



**SAN DIEGO NORTH**  
Economic Development Council

# Where do North County employees work and live?

November 5, 2019

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Chief Analytics Officer and Chief Economist



## Population

2050 4.0 million

20%  
↑

2018 3.3 million

## VMT

2050 103 million

24%  
↑

2018 84 million

64%

of trips are considered  
“mandatory”

1 of 3

trips are for work or  
work related

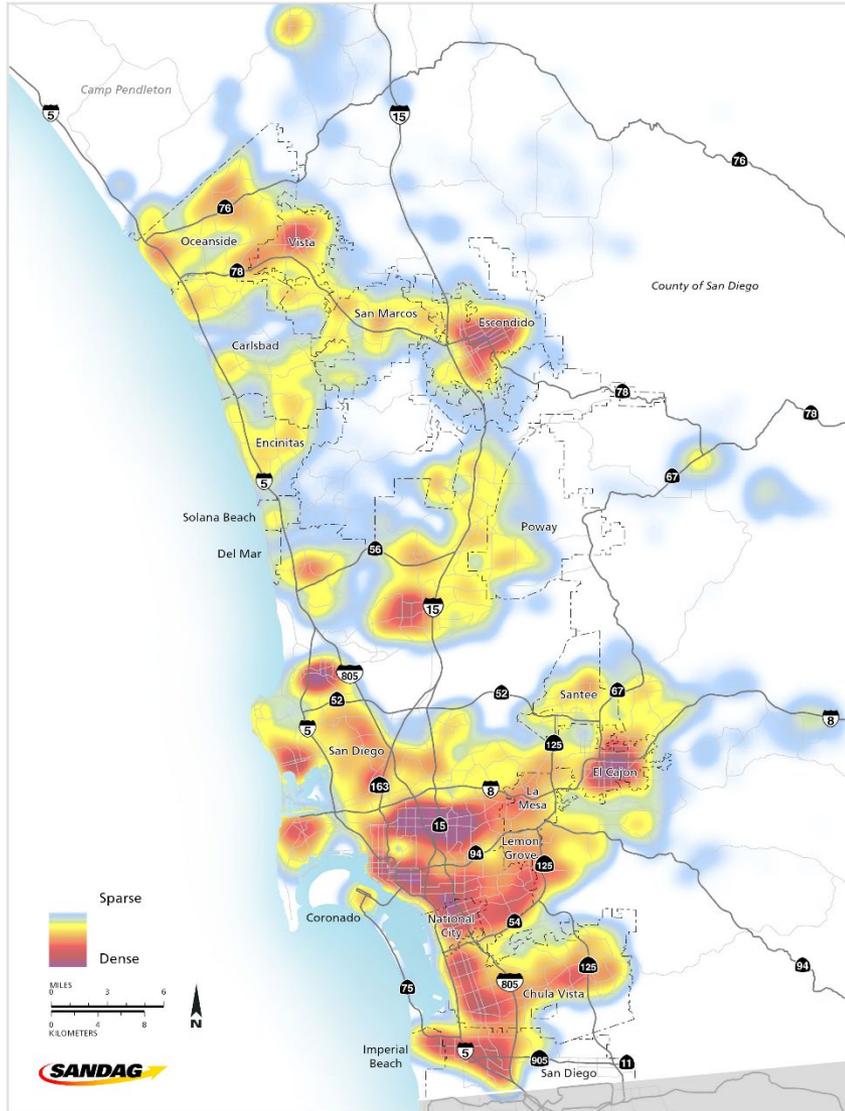
12.2 mile

average commute  
to work

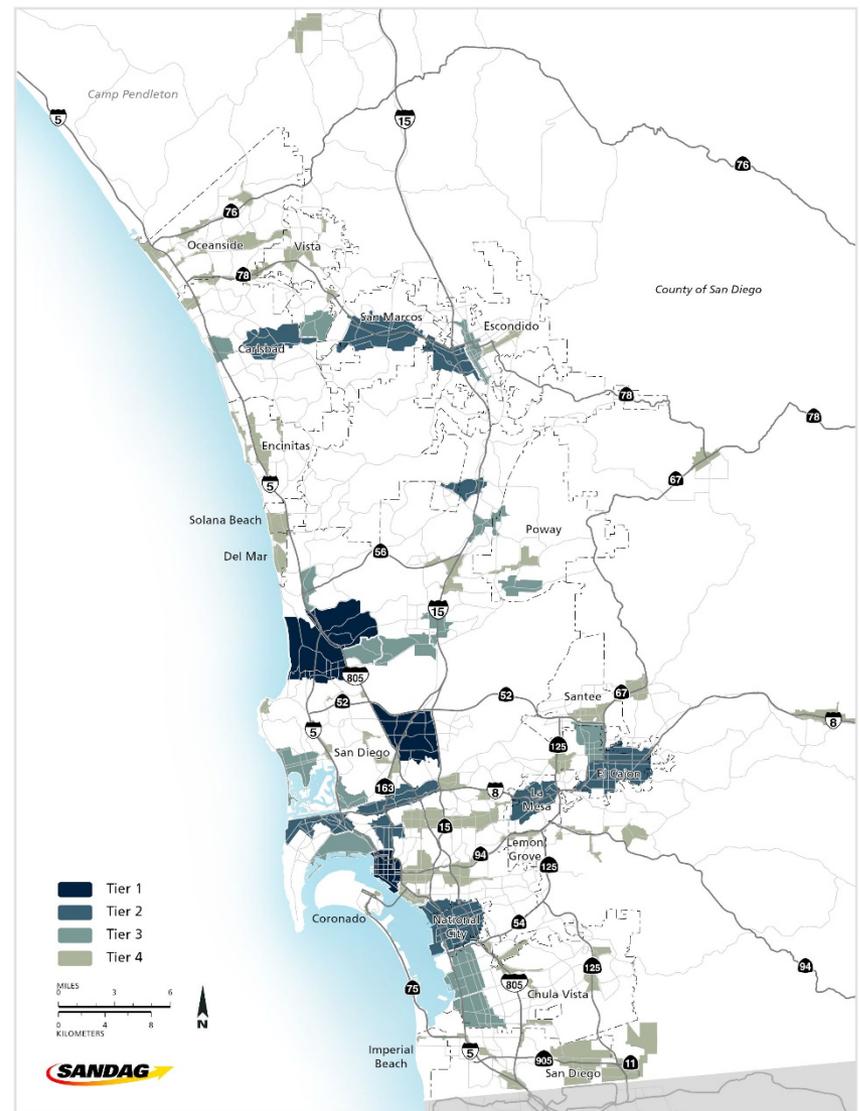


# Where People Live and Work

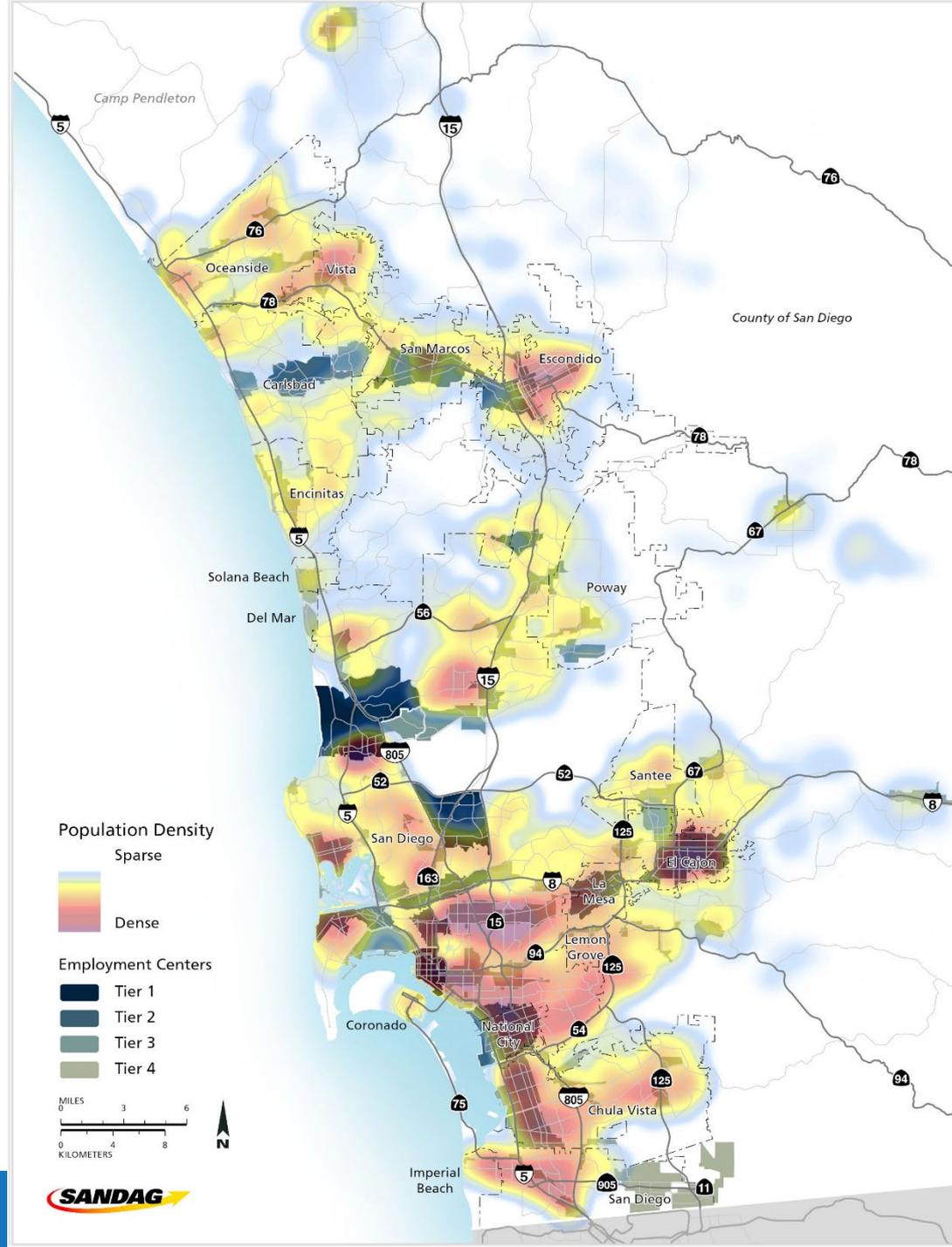
## Population Densities



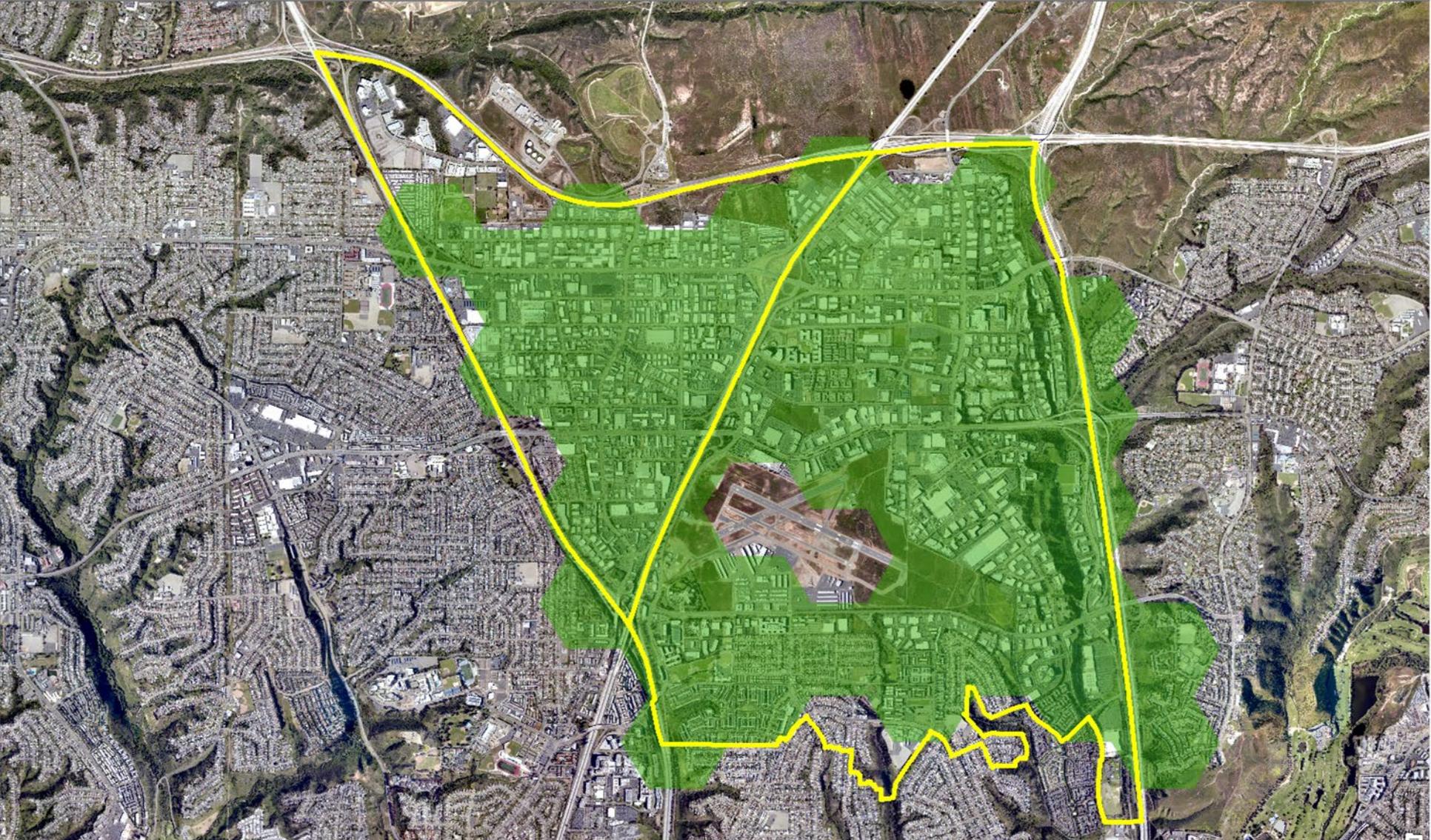
## Employment Densities



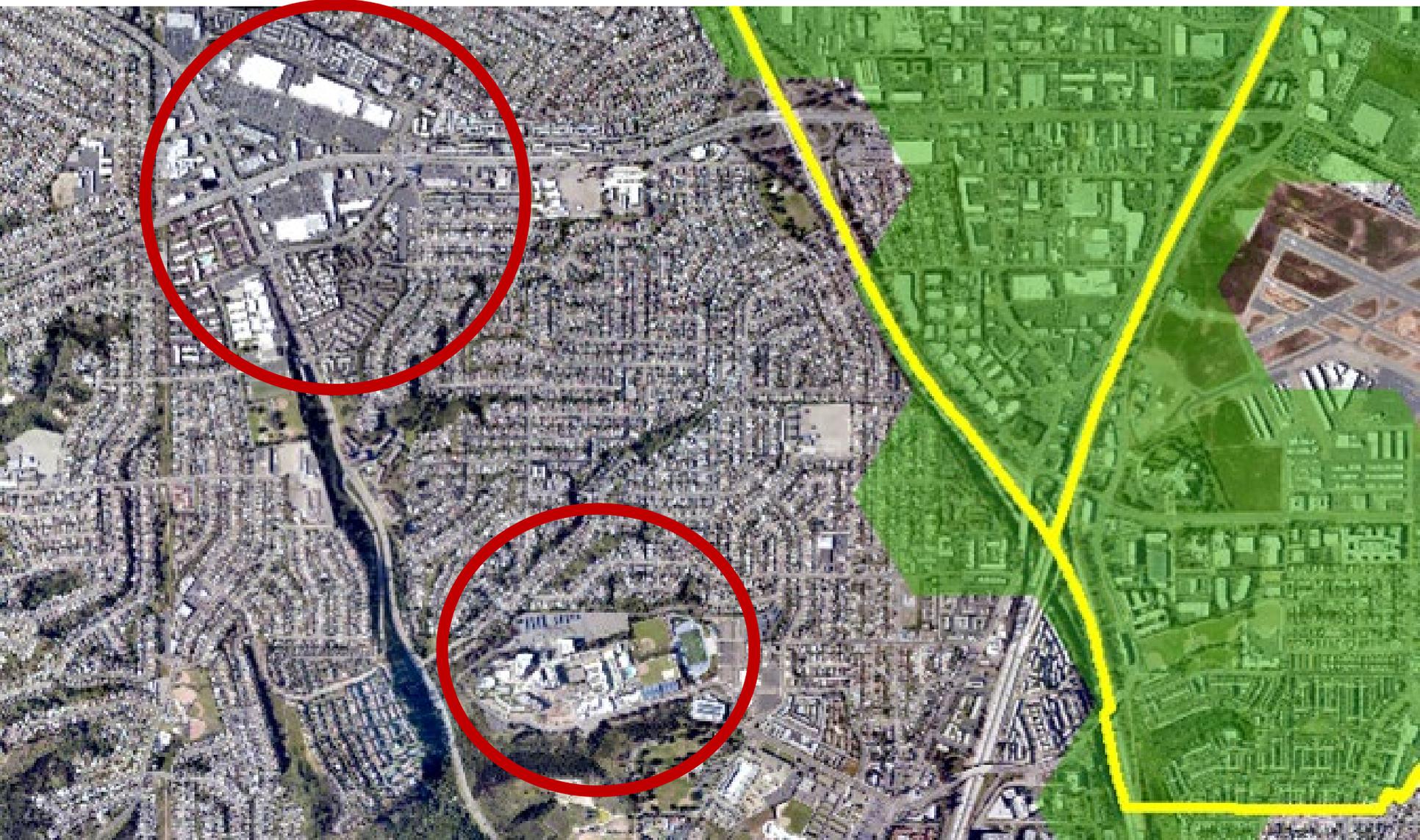
# Where People Live and Work



# Employment Center Development



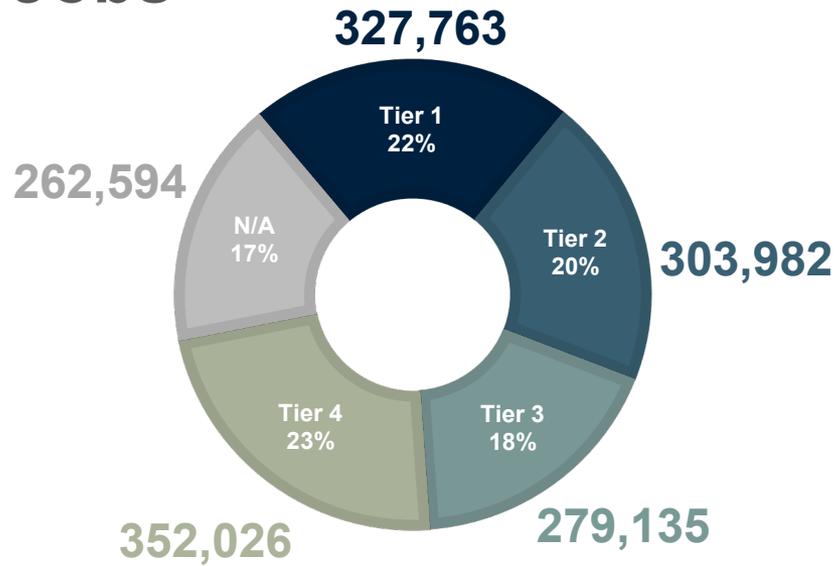
# Employment Center Development



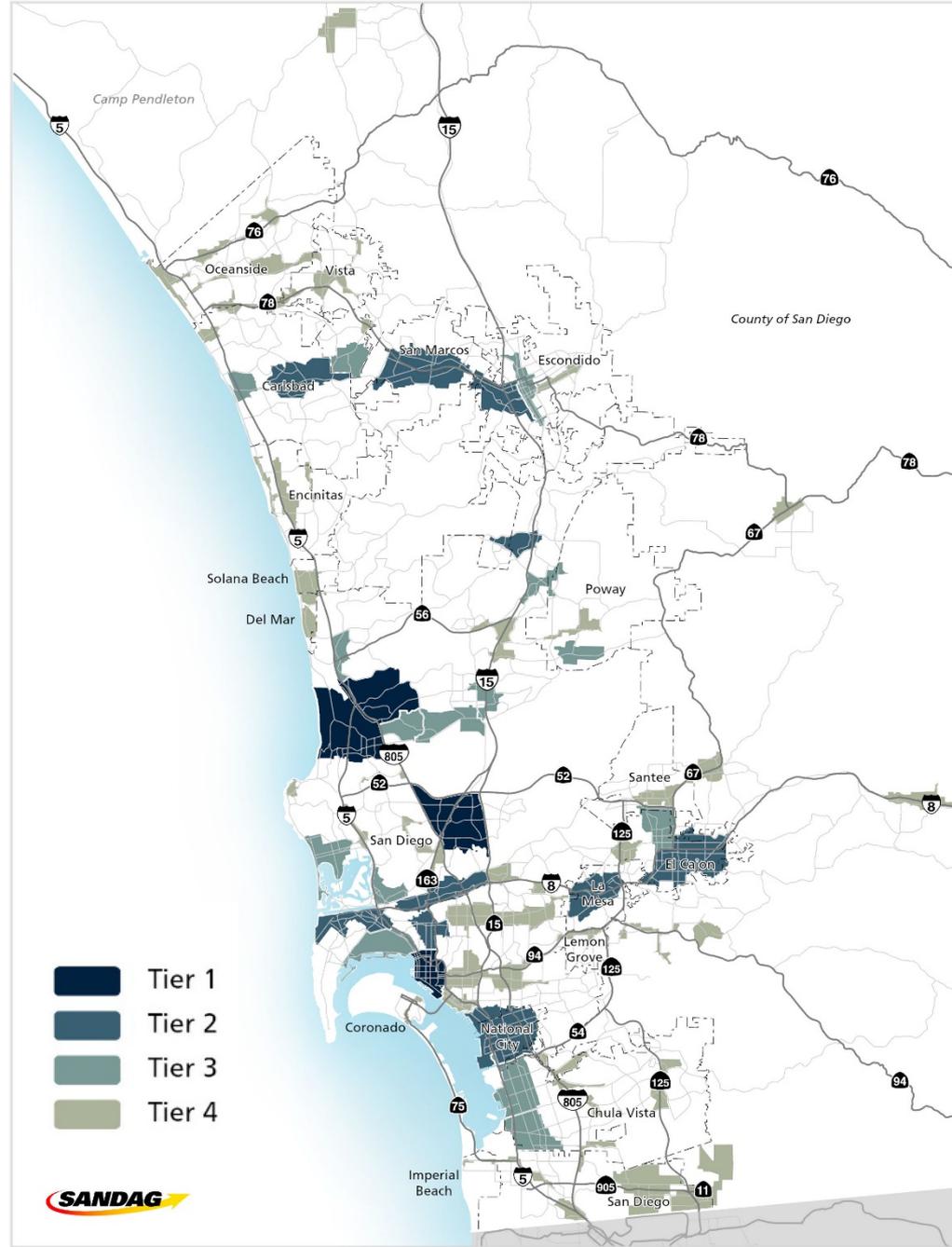


# Employment Centers

## Jobs



- 1,525,500 civilian jobs
- 83% represented in an employment center



# North County Employment Centers

Count: 30

Manufacturing, Retail Trade, and Health Care/Social Assistance

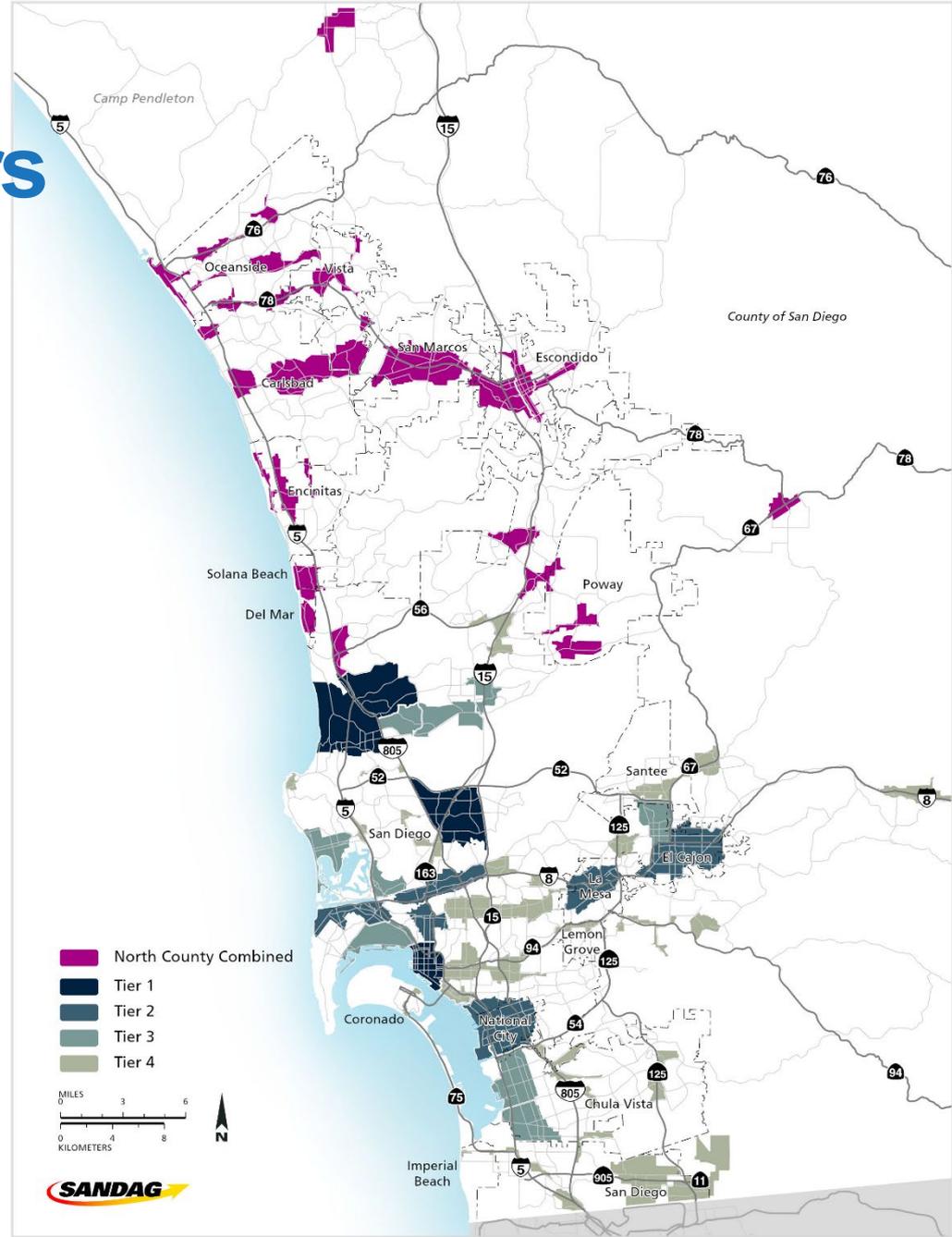
**14,000** Businesses

**350,000** Jobs

**\$57,000** Avg. Salary

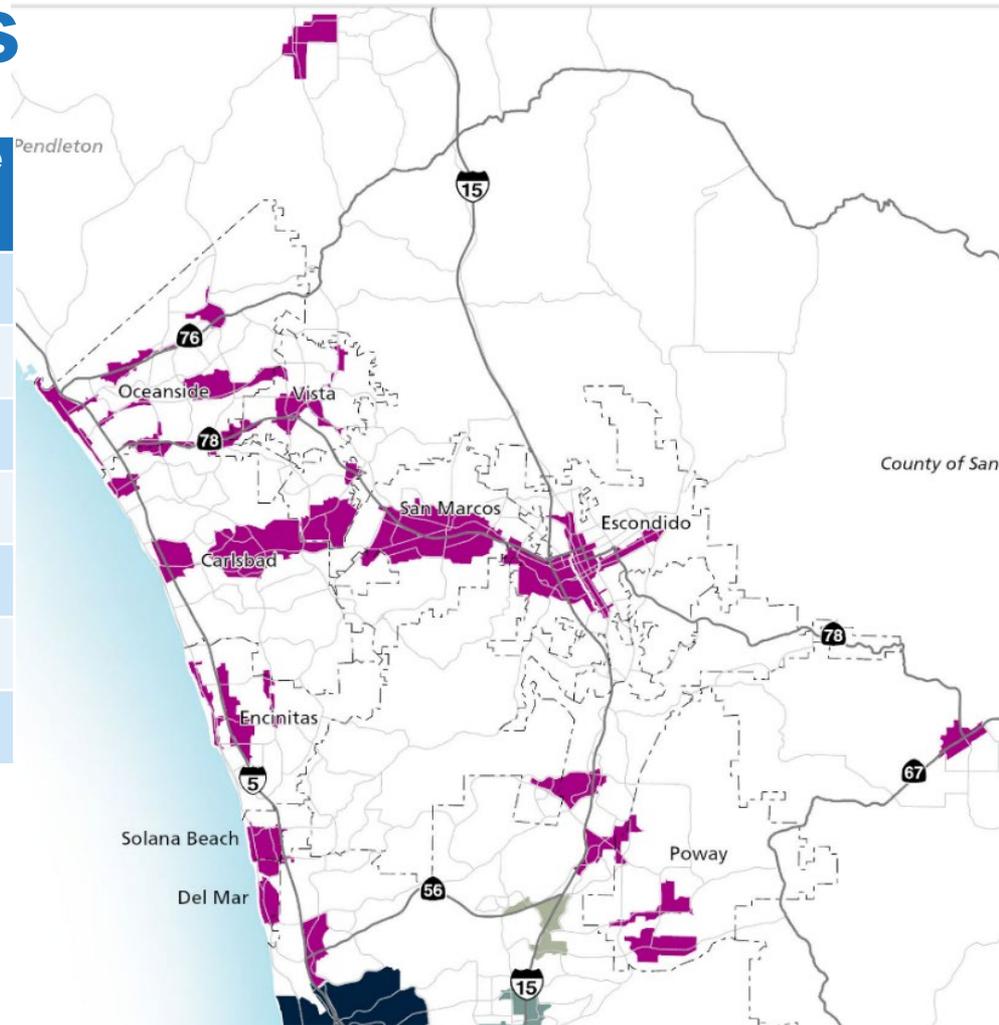
**7.5 million** Daily VMT

**10.6** Miles Average Trip Length



# North County Employment Centers

North County Subareas	Jobs	Vehicle Miles Traveled	Average Trip Length
East 78	85,515	1,665,387	9.7
I-15	73,763	1,891,033	12.8
Palomar Airport Road	72,646	1,426,065	9.8
Coastal	49,879	1,294,466	13.0
West 78	36,457	613,821	8.4
Oceanside Area	34,202	580,055	8.5
<b>Total</b>	<b>352,462</b>	<b>7,470,827</b>	<b>10.6</b>



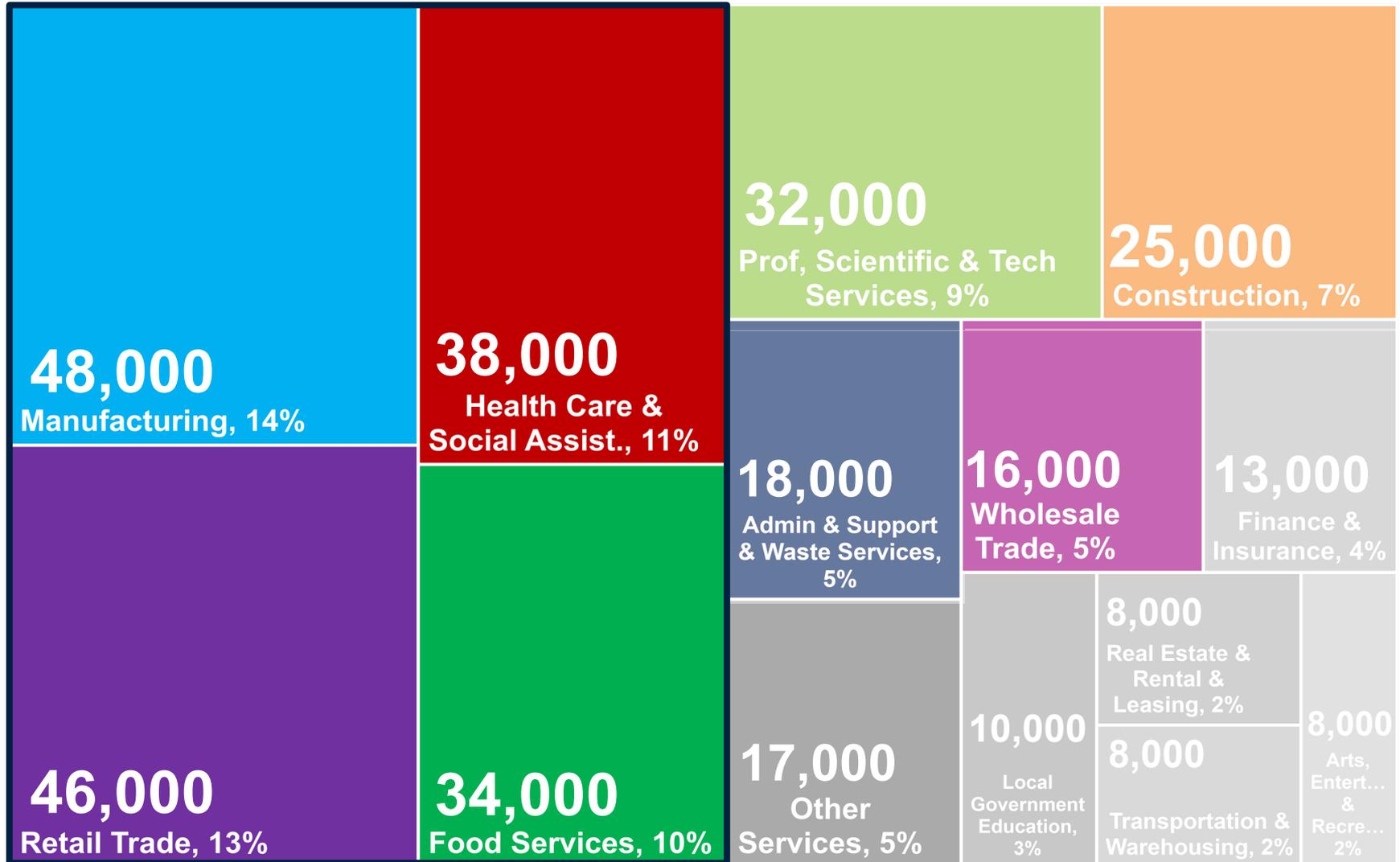
**1 out of 2 businesses**

(14,000 out of 25,000)

**78% of jobs**

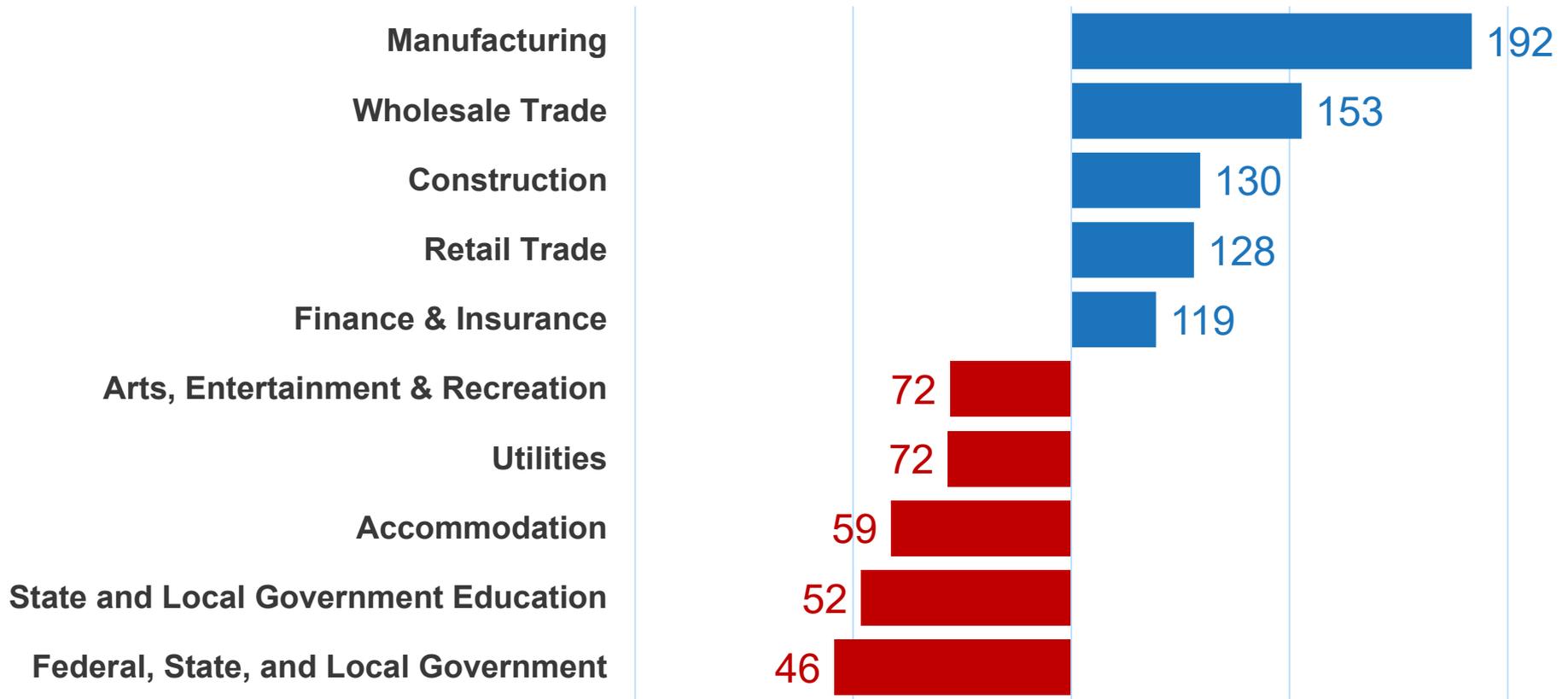
(352K out of 456K)

# North County Employment Centers Employment by Sector



# North County Employment Centers Relative Job Penetration

Region = 100 (INDEX)



# North County Employment Centers

Count: 30

Oceanside Area  
(Pink)

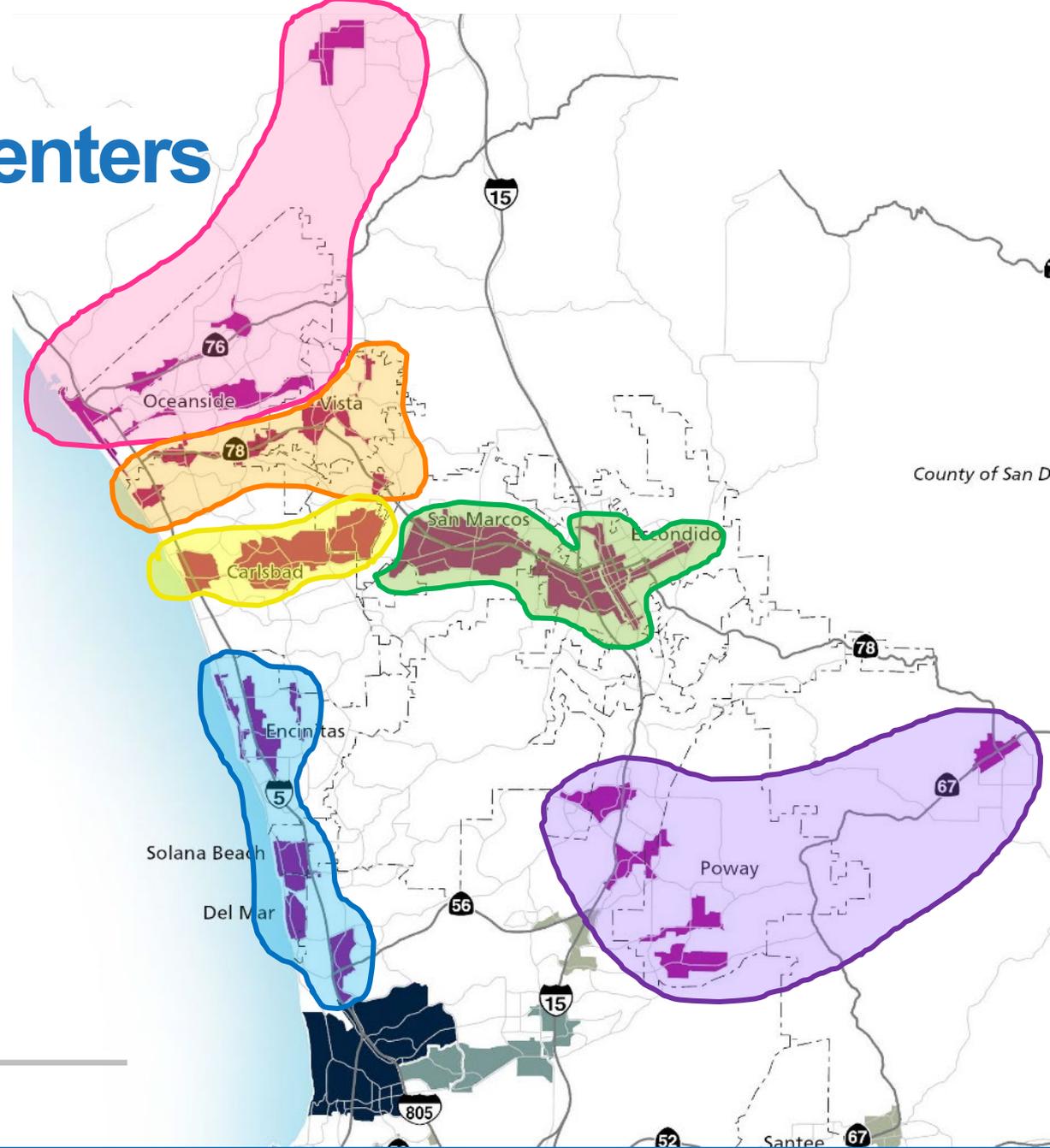
West 78  
(Orange)

Palomar Airport Road  
(Yellow)

East 78  
(Green)

Coastal  
(Blue)

I-15  
(Purple)



# Oceanside Area

Count: 6

Food Services; Manufacturing; Retail

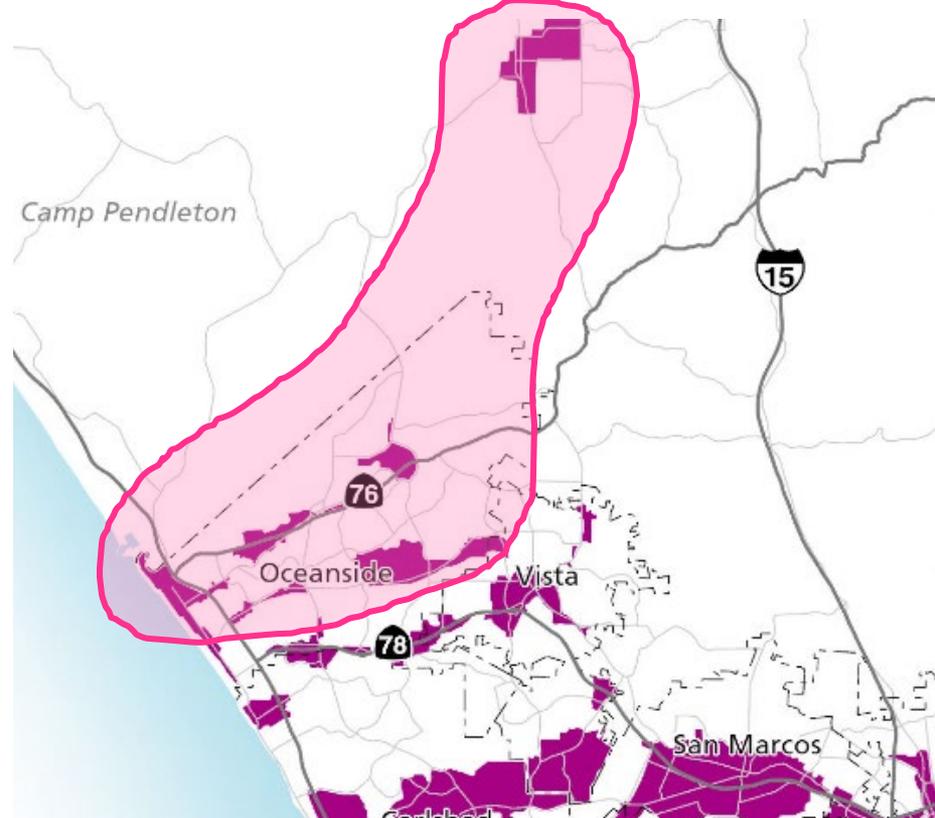
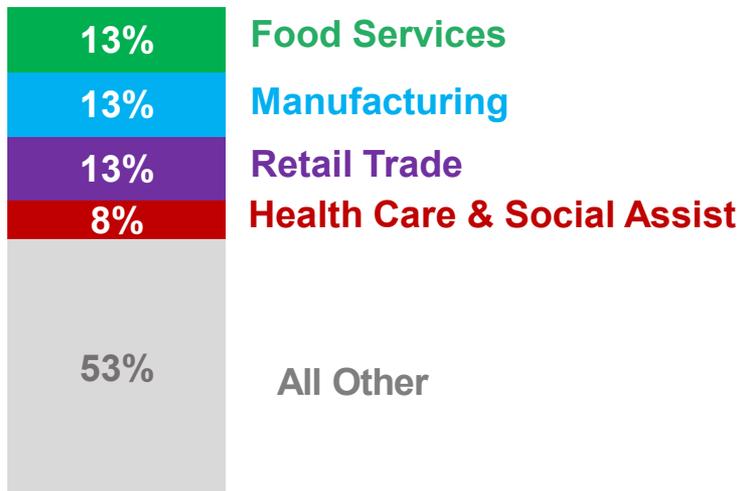
**1,700** Businesses

**34,000** Jobs

**\$42,000** Average Salary

**600,000** Daily VMT

**8.5 miles** Average Trip Length



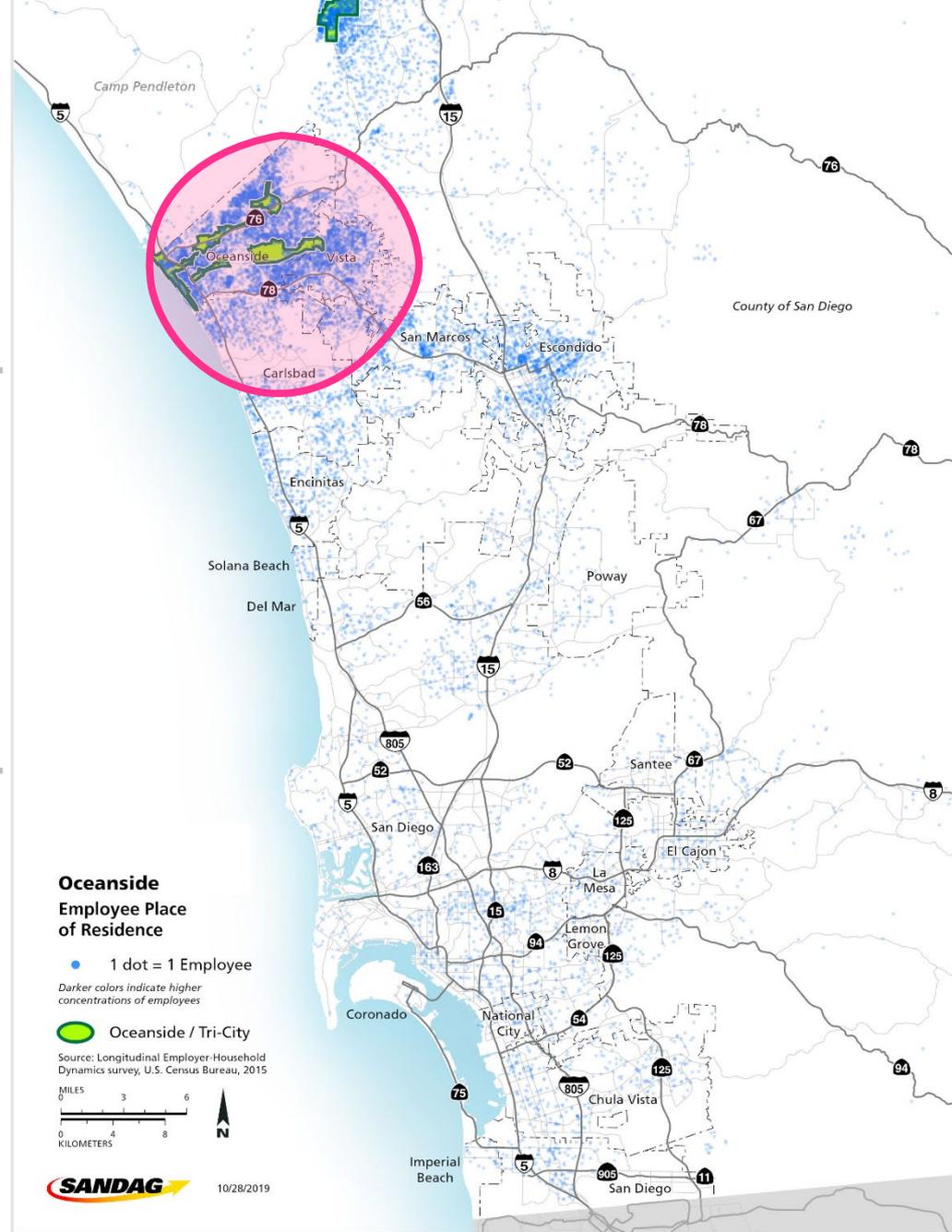
Oceanside Area	Jobs	Vehicle Miles Traveled	Average Trip Length
Fallbrook	5,960	96,973	8.1
Oceanside – Oceanside Blvd	2,583	44,853	8.7
Oceanside - Mission	5,249	97,333	9.3
Oceanside - Old Grove	2,325	33,206	7.1
Oceanside - Rancho Del Oro	9,785	151,569	7.7
Oceanside Civic Center	8,300	156,120	9.4
<b>Total</b>	<b>34,202</b>	<b>580,055</b>	<b>8.5</b>

# Oceanside Area

## Employees Place of Residence

**34,000** Total employees

**56%** Live in the area around Oceanside Area



# West 78

Count: 6

Health Care and Social Assist; Retail Trade;  
Food Services

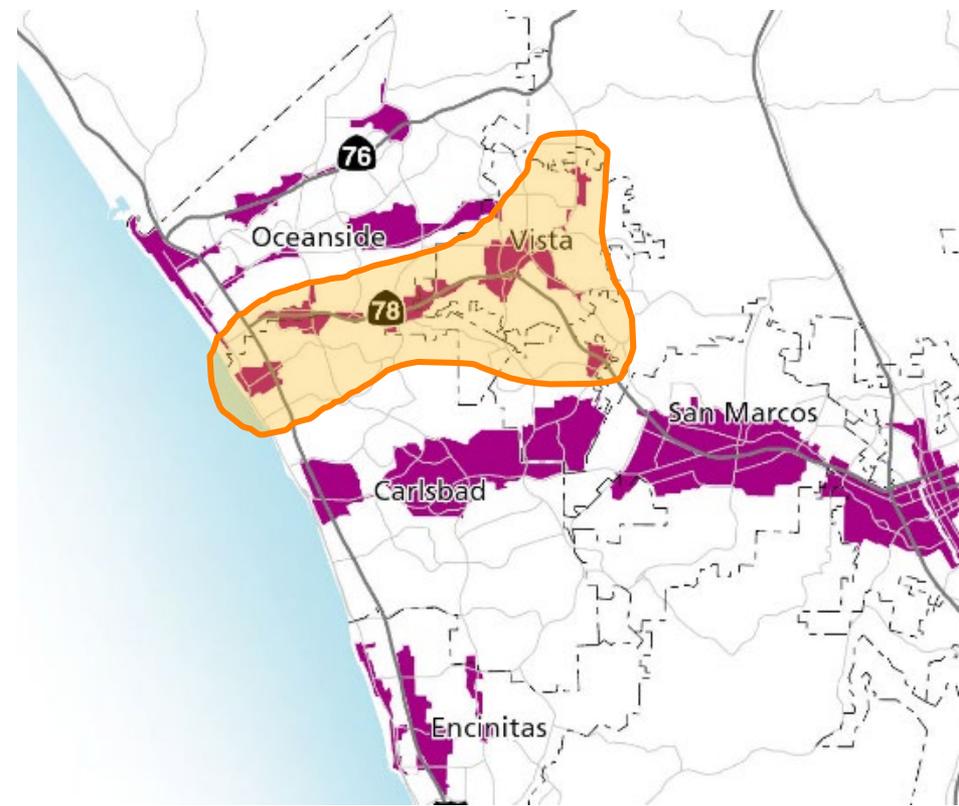
**1,800** Businesses

**37,000** Jobs

**\$37,000** Average Salary

**600,000** Daily VMT

**8.4 miles** Average Trip Length



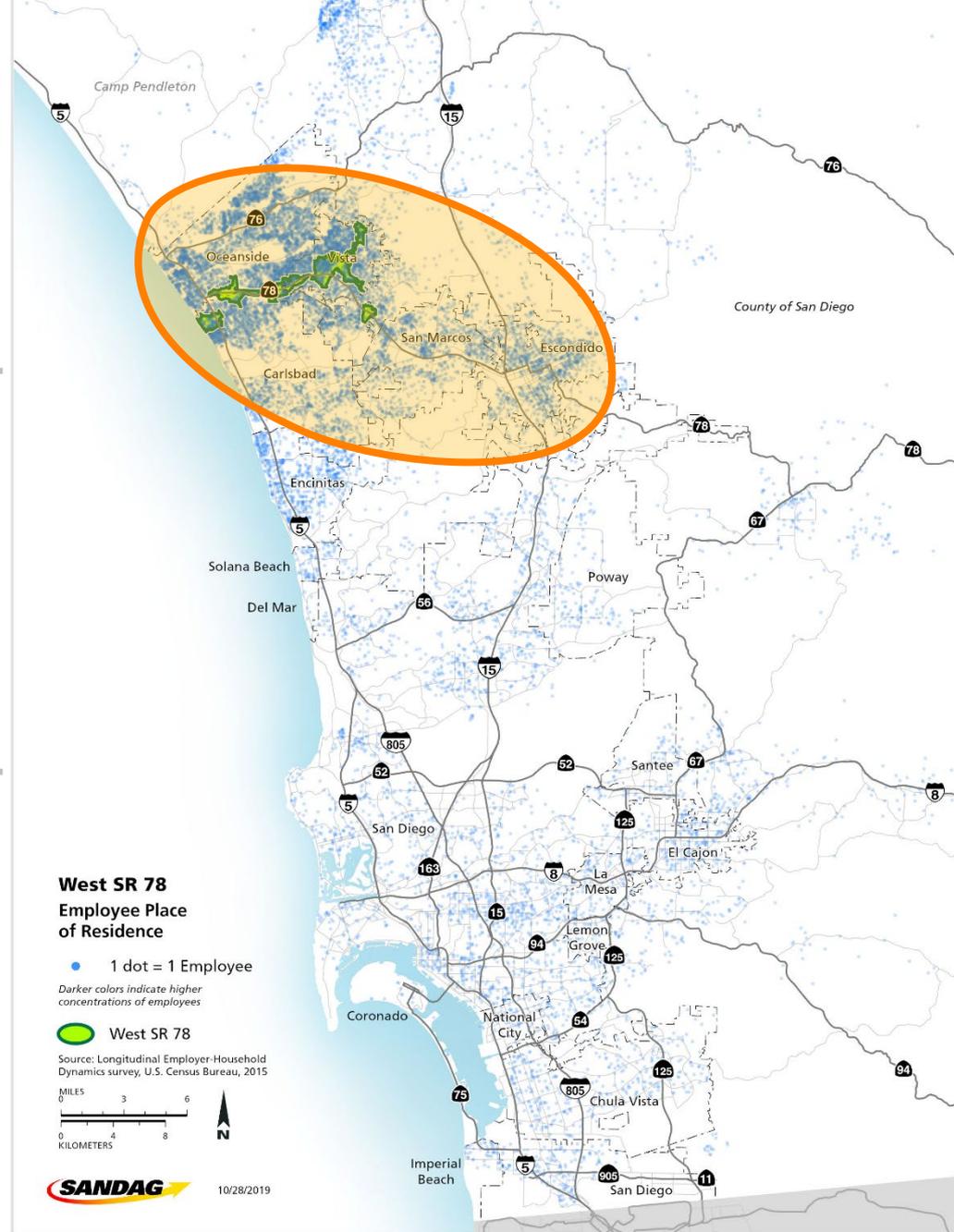
West 78	Jobs	Vehicle Miles Traveled	Average Trip Length
Carlsbad Village	7,684	147,082	9.6
El Camino	6,816	112,292	8.2
Oceanside Tri-city	8,377	133,208	8.0
Vista Guajome	2,877	49,998	8.7
Vista Sycamore	2,631	47,528	9.0
Vista Village	8,072	123,713	7.7
<b>Total</b>	<b>36,457</b>	<b>613,821</b>	<b>8.4</b>

# West 78

## Employees Place of Residence

**32,000** Total employees

**72%** Live in the area around West 78



# Palomar Airport Road

Count: 3

Manufacturing; Prof, Scientific & Tech Services;  
Wholesale Trade

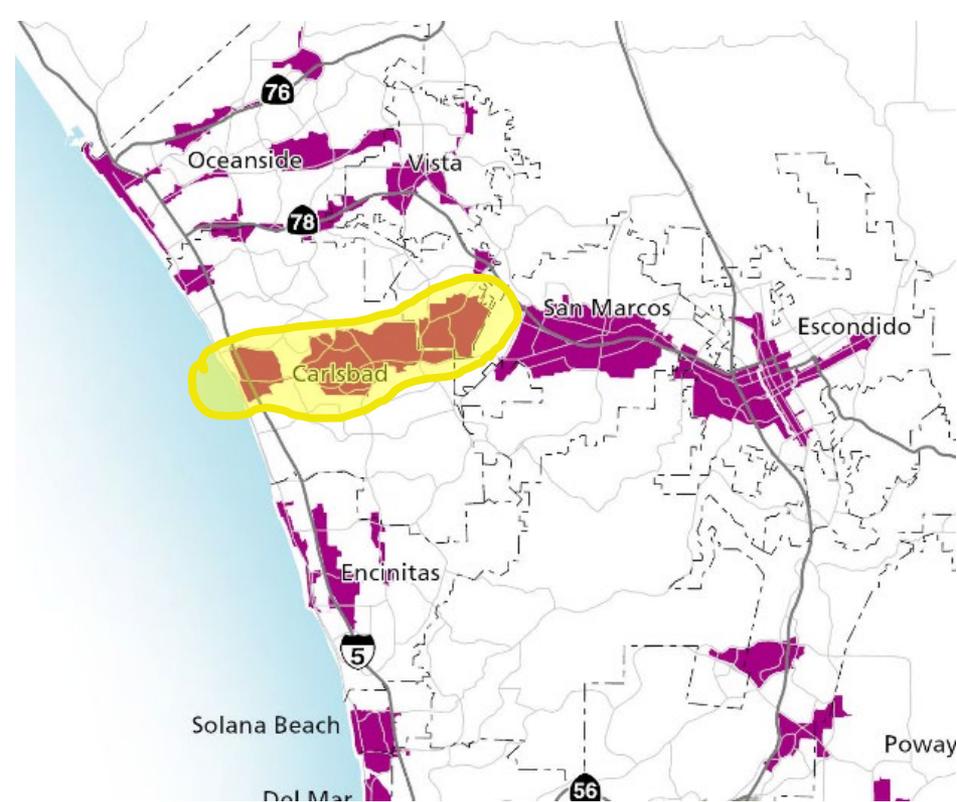
**2,000** Businesses

**73,000** Jobs

**\$67,000** Average Salary

**1.4 million** Daily VMT

**9.8 miles** Average Trip Length



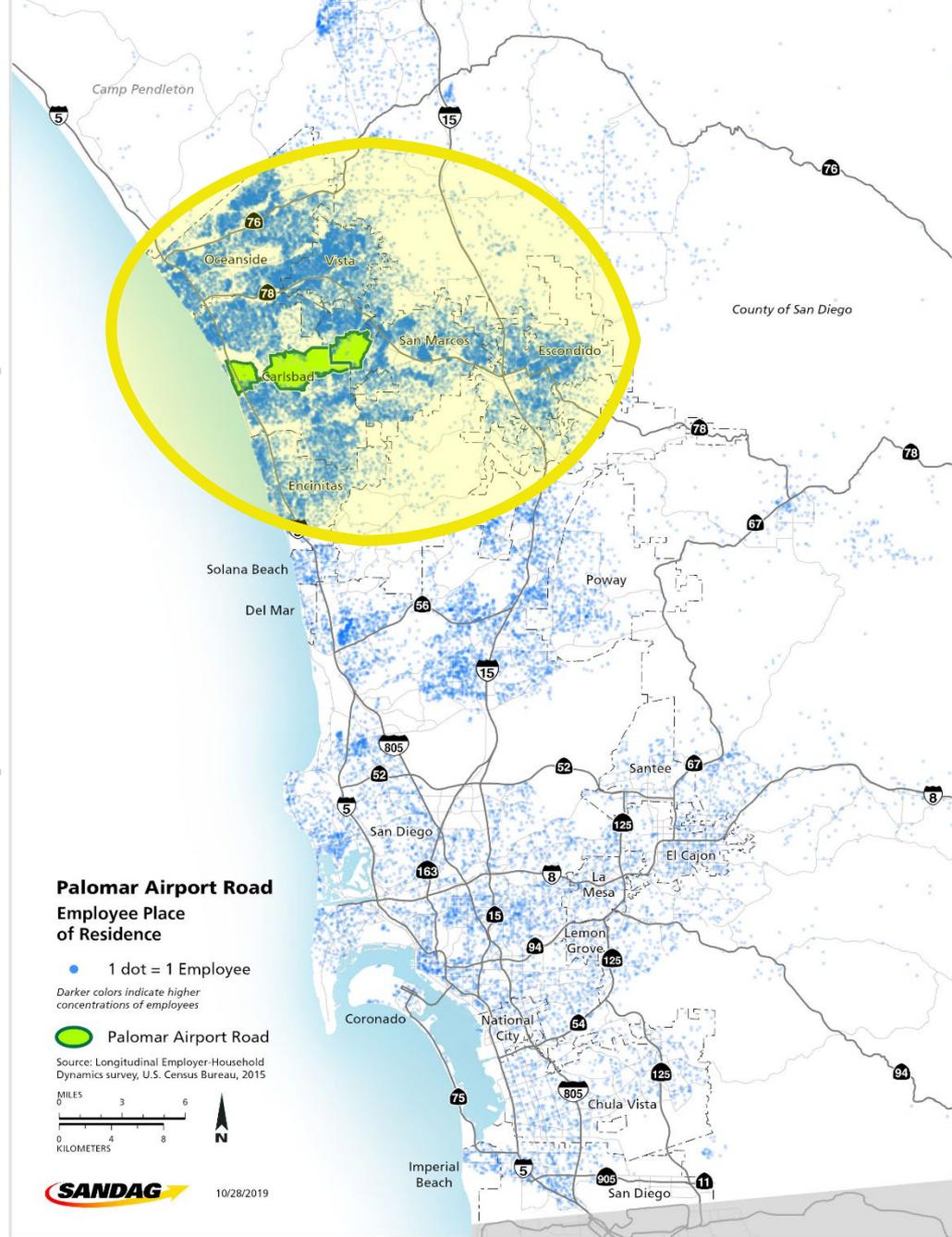
Palomar Airport Road	Jobs	Vehicle Miles Traveled	Average Trip Length
Carlsbad Palomar Airport	36,055	702,426	9.7
Vista Tech Park	20,943	388,391	9.3
Carlsbad State Beach	15,648	335,248	10.7
<b>Total</b>	<b>72,646</b>	<b>1,426,065</b>	<b>9.8</b>

# Palomar Airport Road

## Employees Place of Residence

**73,000** Total employees

**71%** Live in the area around the Palomar Airport Road



# East 78

Count: 4

Retail Trade; Construction; Health Care & Social Assistance

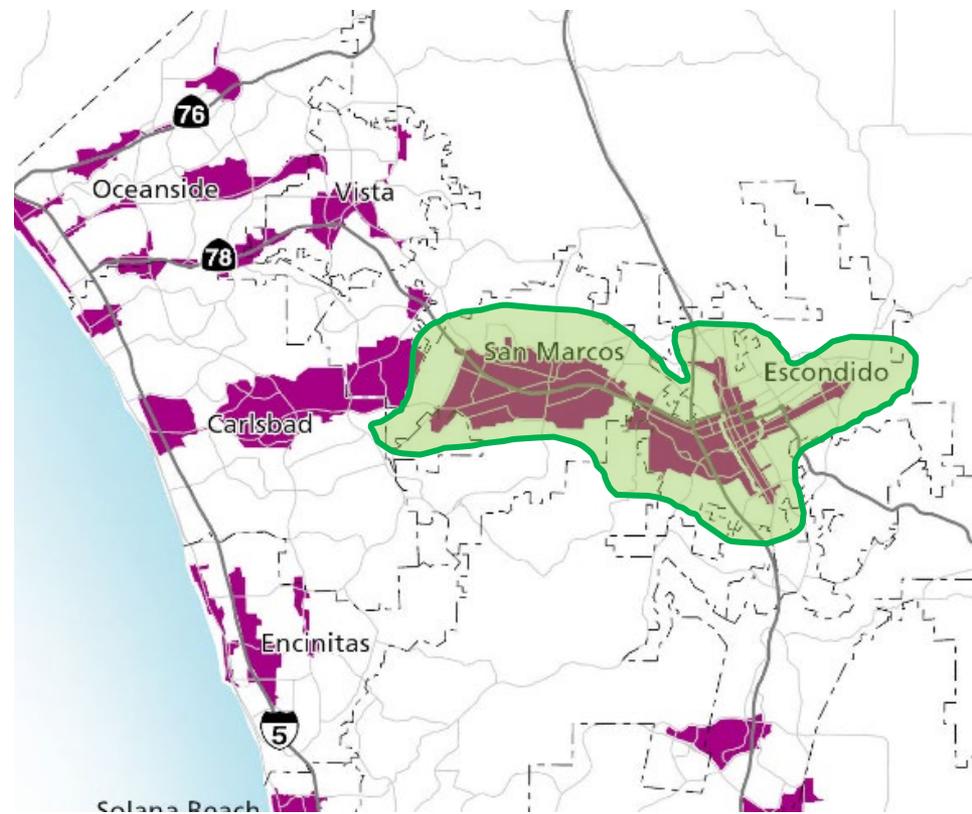
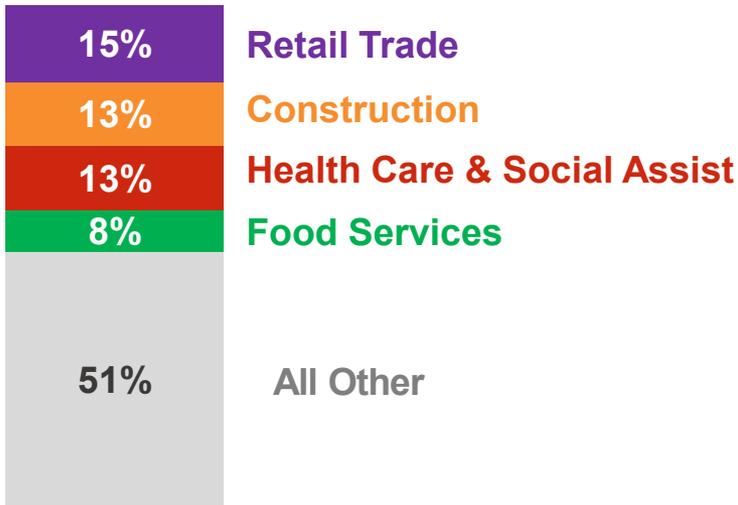
**3,500** Businesses

**86,000** Jobs

**\$48,000** Average Salary

**1.6 million** Daily VMT

**9.7 miles** Average Trip Length



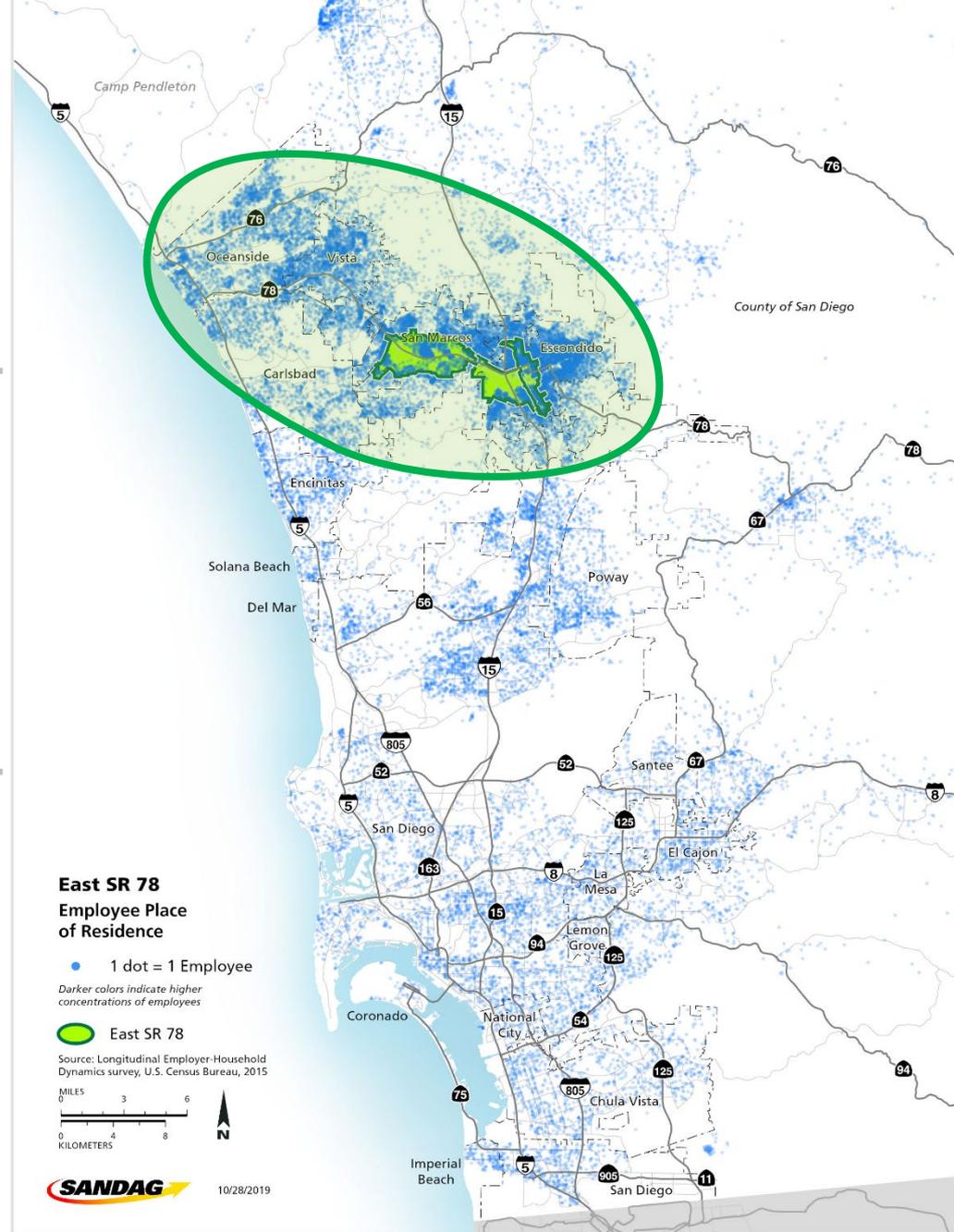
East 78	Jobs	Vehicle Miles Traveled	Average Trip Length
Escondido - Midway	6,725	125,990	9.4
Escondido - Palomar	30,644	639,037	10.4
Escondido Centre City	15,130	293,076	9.7
San Marcos Civic Center	33,016	607,284	9.2
<b>Total</b>	<b>85,515</b>	<b>1,665,387</b>	<b>9.7</b>

# East 78

## Employees Place of Residence

86,000 Total employees

65% Live in the area around East 78



# Coastal

Count: 6

Food Services; Prof, Scientific & Tech Services;  
Retail Trade

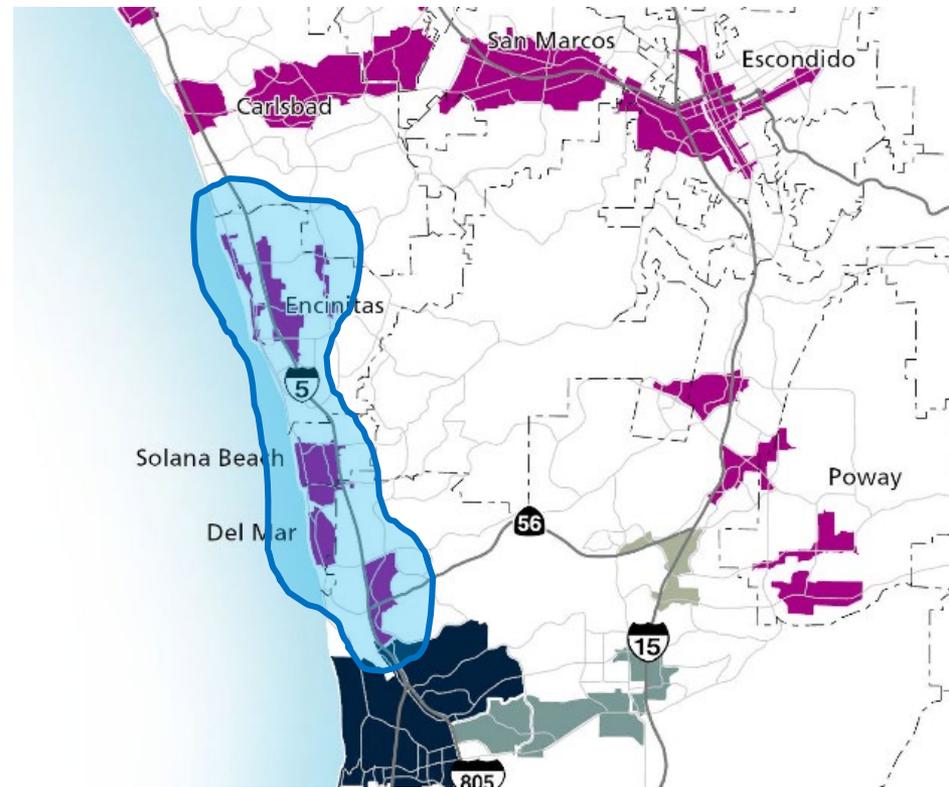
**3,000** Businesses

**50,000** Jobs

**\$65,000** Average Salary

**1.3 million** Daily VMT

**13.0 miles** Average Trip Length



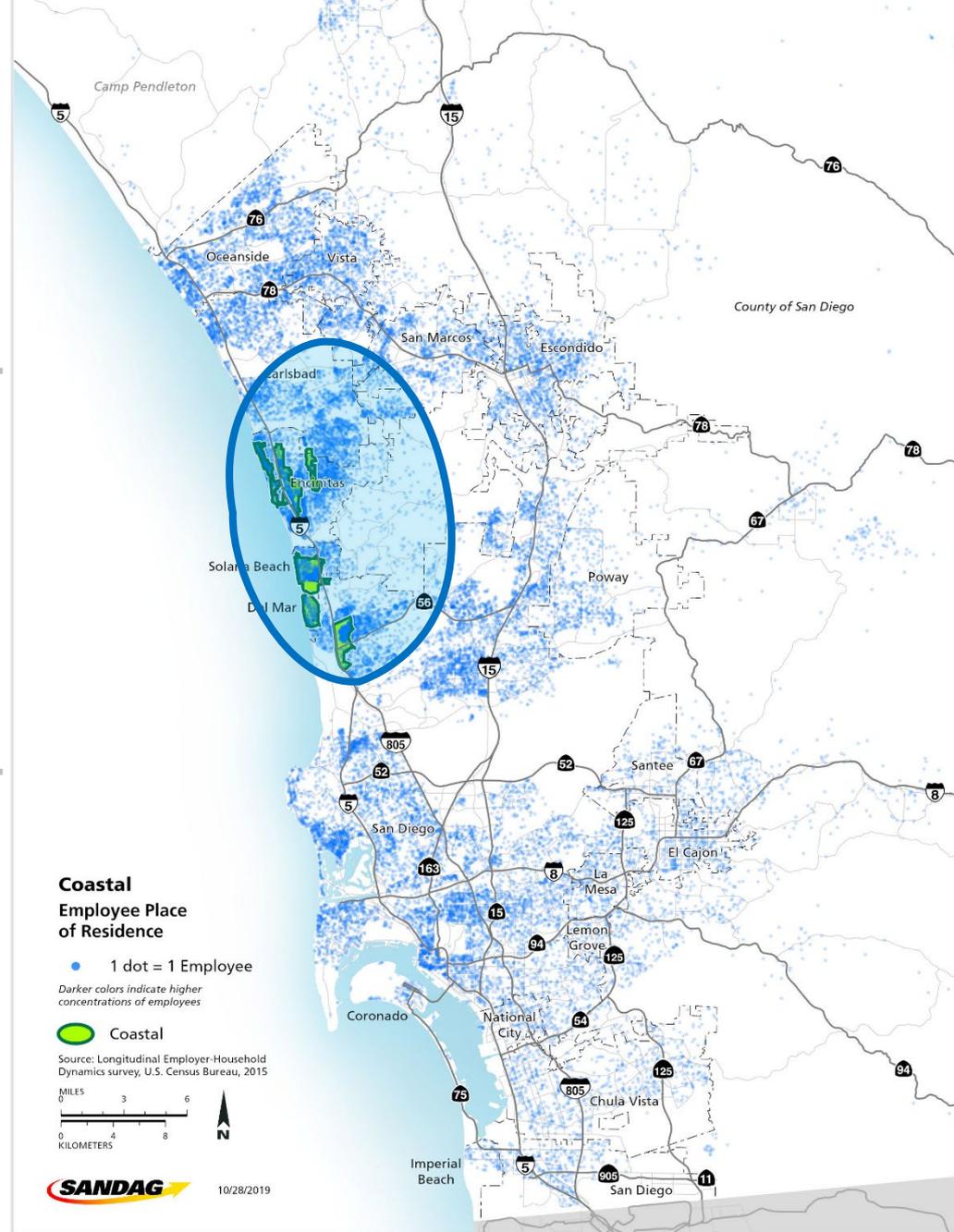
Coastal	Jobs	Vehicle Miles Traveled	Average Trip Length
Carmel Valley	15,188	400,629	13.2
Del Mar	3,128	89,497	14.3
Encinitas - I-5 Eastward	5,857	143,711	12.3
Encinitas - La Costa	6,524	145,835	11.2
Encinitas Beach	7,369	182,605	12.4
Solana Beach	11,813	332,190	14.1
<b>Total</b>	<b>49,879</b>	<b>1,294,466</b>	<b>13.0</b>

# Coastal

## Employees Place of Residence

**50,000** Total employees

**30%** Live in the area around Coastal



# I-15

Count: 5

Manufacturing; Prof, Scientific & Tech Services;  
Health Care & Social Assist

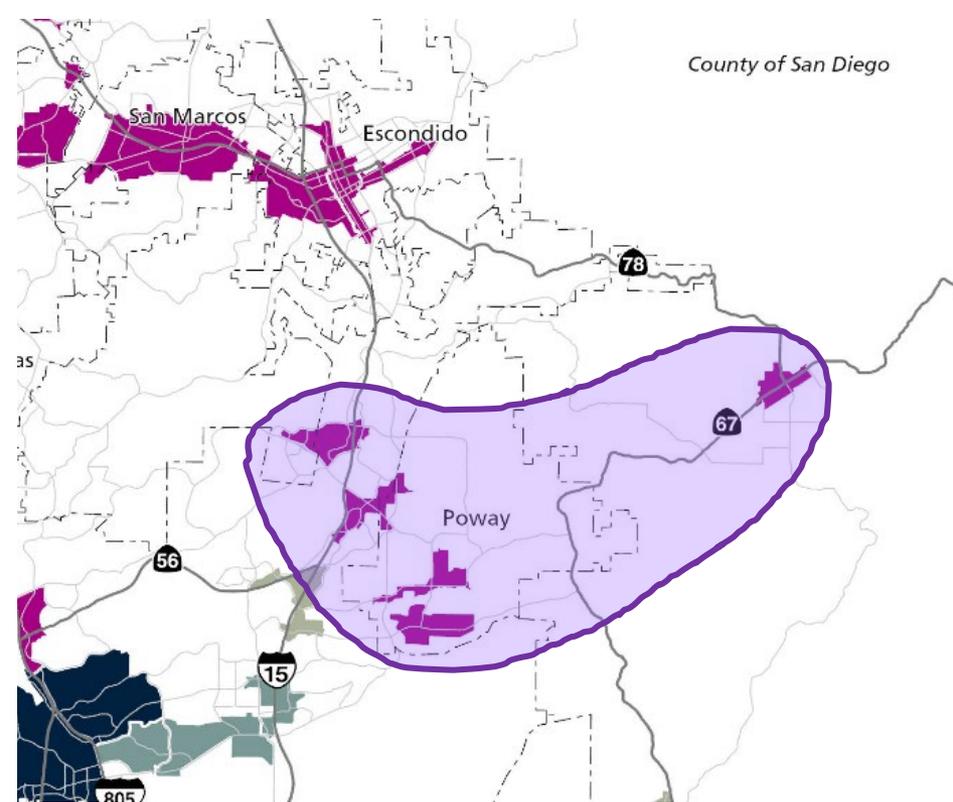
**2,200** Businesses

**74,000** Jobs

**\$68,000** Average Salary

**1.9 million** Daily VMT

**12.8 miles** Average Trip Length



I-15	Jobs	Vehicle Miles Traveled	Average Trip Length
Poway	6,609	171,367	13.0
Ramona	3,930	89,925	11.4
Rancho Bernardo	16,542	414,844	12.5
Scripps Poway	21,575	600,390	13.9
West Bernardo	25,107	614,506	12.2
<b>Total</b>	<b>73,763</b>	<b>1,891,033</b>	<b>12.8</b>



# Learn More

sandag.org/EmploymentCenters

**Employment centers in the San Diego region:**  
An analysis of where people live and work

**Downtown San Diego employment center**



**Key contact**  
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**Updated May 2019**

**Fast facts**

76,218	employees
5.0%	region's employees
2nd	largest of 7 employment centers
2.82	land area (square miles)
27,081	employees per square mile
48,758	residents
23,284	households

**SANDAG**

Please note the employment center pack represents location 2. As these analyses are finalized there may be minor adjustments to the data presented here as census and data elements are refined.

**Employment centers in the San Diego region:**  
An analysis of where people live and work

**Sorrento Valley employment center**



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**Updated May 2019**

**Fast facts**

129,242	employees
8.5%	region's employees
1st	largest of 7 employment centers
15.13	land area (square miles)
8,542	employees per square mile
57,548	residents
15,105	households

**SANDAG**

Please note the employment center pack represents location 2. As these analyses are finalized there may be minor adjustments to the data presented here as census and data elements are refined.

**Employment centers in the San Diego region:**  
An analysis of where people live and work

**Kearny Mesa employment center**



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**Updated May 2019**

**Fast facts**

122,103	employees
8.0%	region's employees
2nd	largest of 7 employment centers
7.23	land area (square miles)
16,915	employees per square mile
17,326	residents
8,478	households

**SANDAG**

Please note the employment center pack represents location 2. As these analyses are finalized there may be minor adjustments to the data presented here as census and data elements are refined.

# Contact

## Ray Major

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