



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

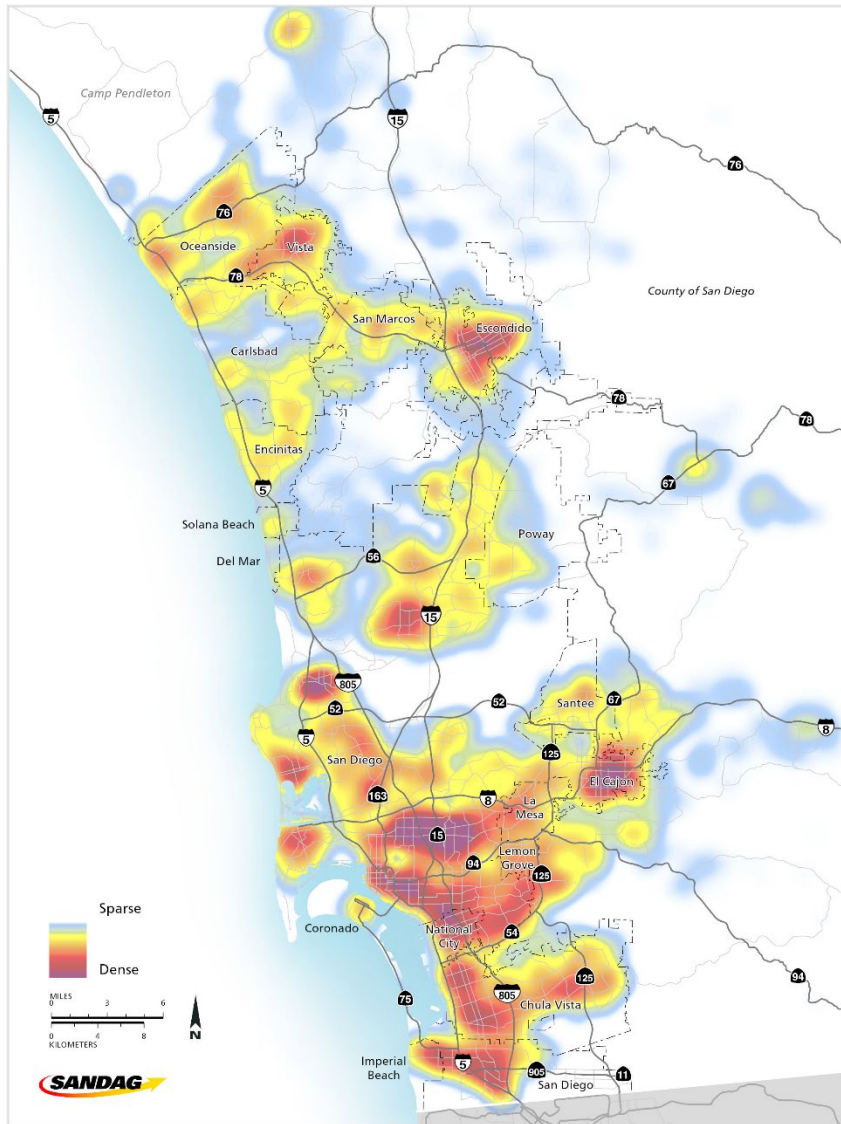
12.2 mile

average commute
to work

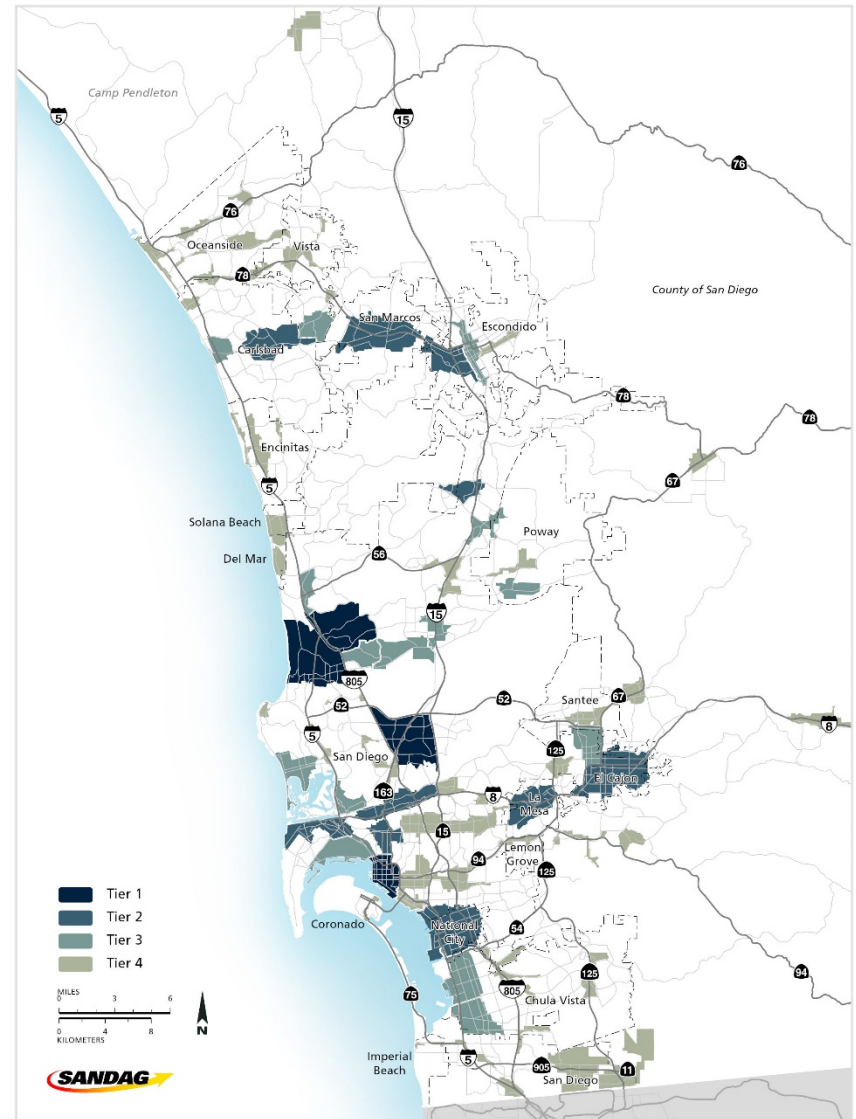


Where People Live and Work

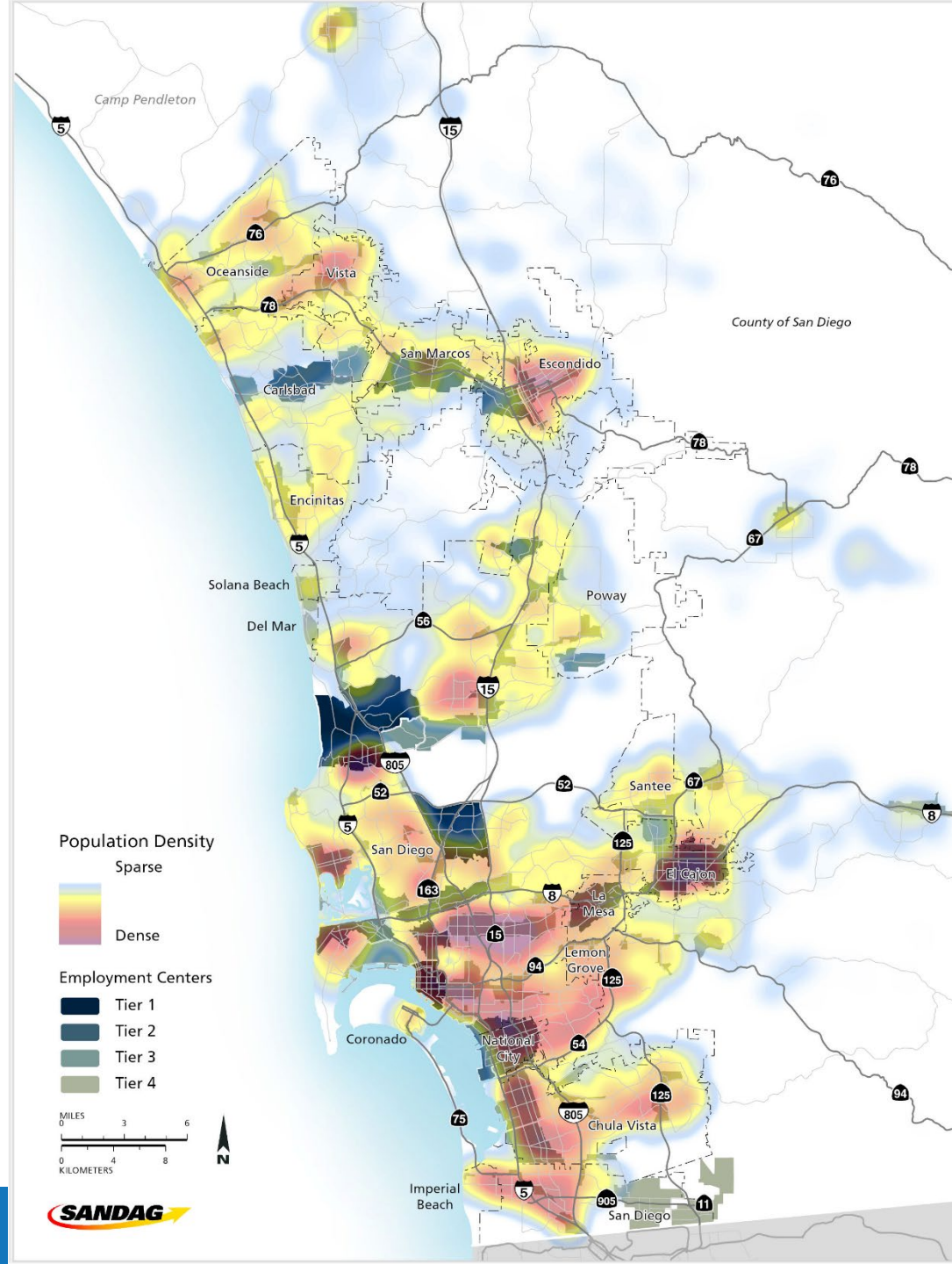
Population Densities



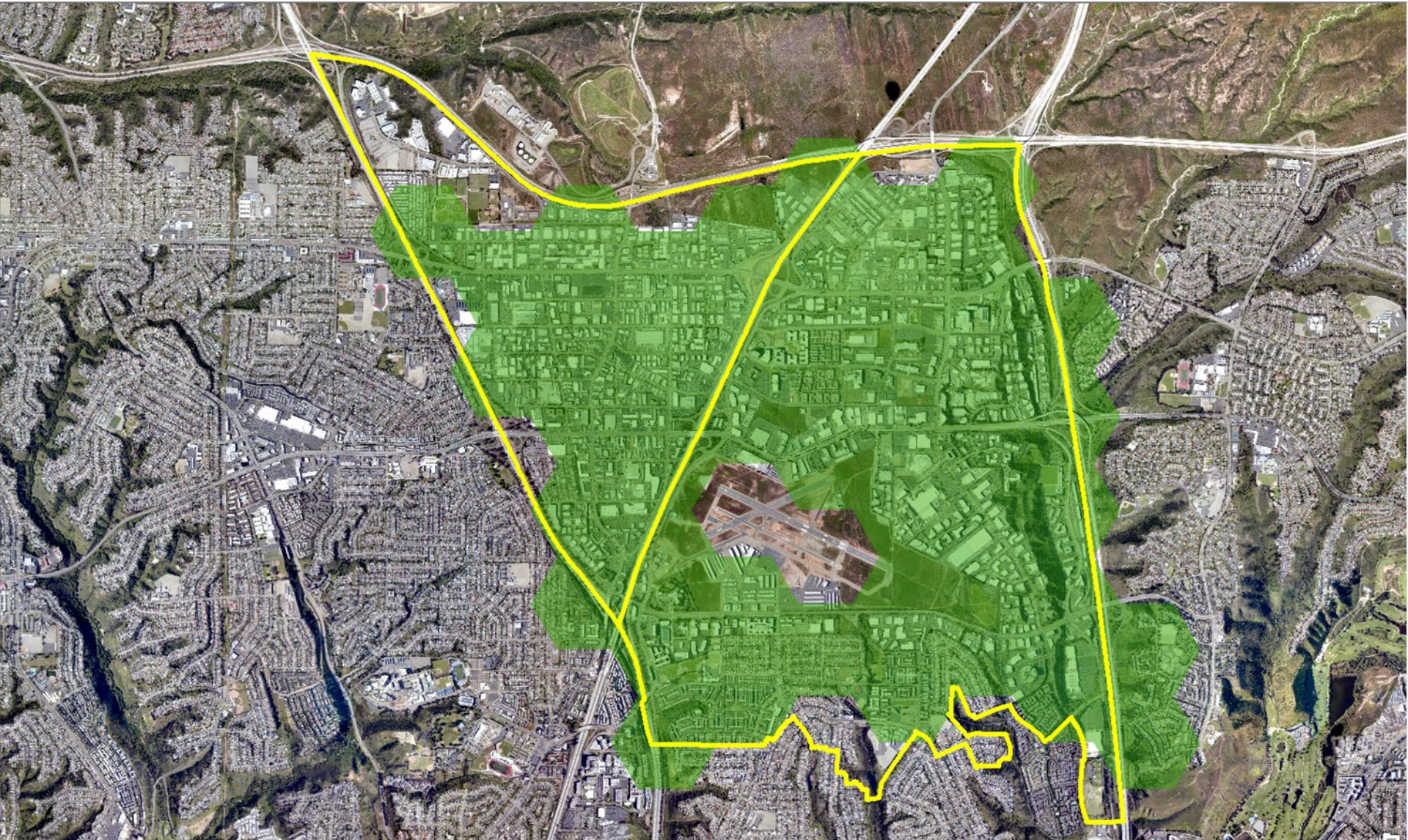
Employment Densities



Where People Live and Work



Employment Center Development

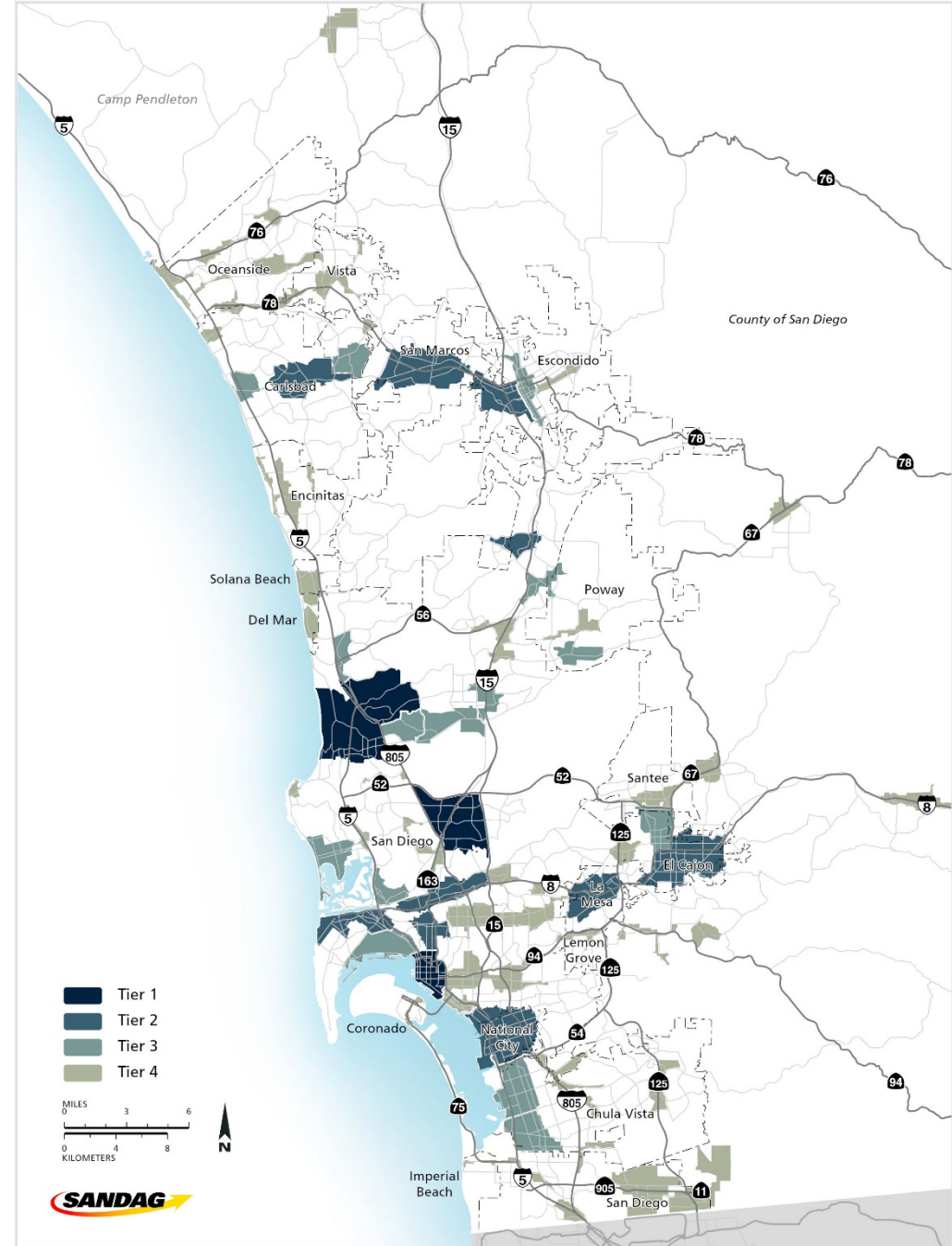


Employment Center Development



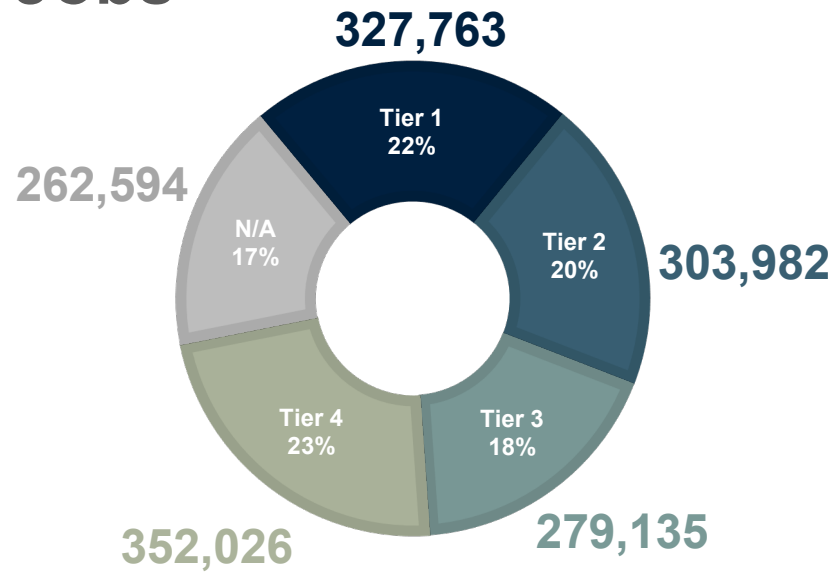
Employment Centers

Tier 1	3	75,000 +
Tier 2	10	25,000 – 75,000
Tier 3	15	15,000 – 25,000
Tier 4	51	2,500 – 15,000

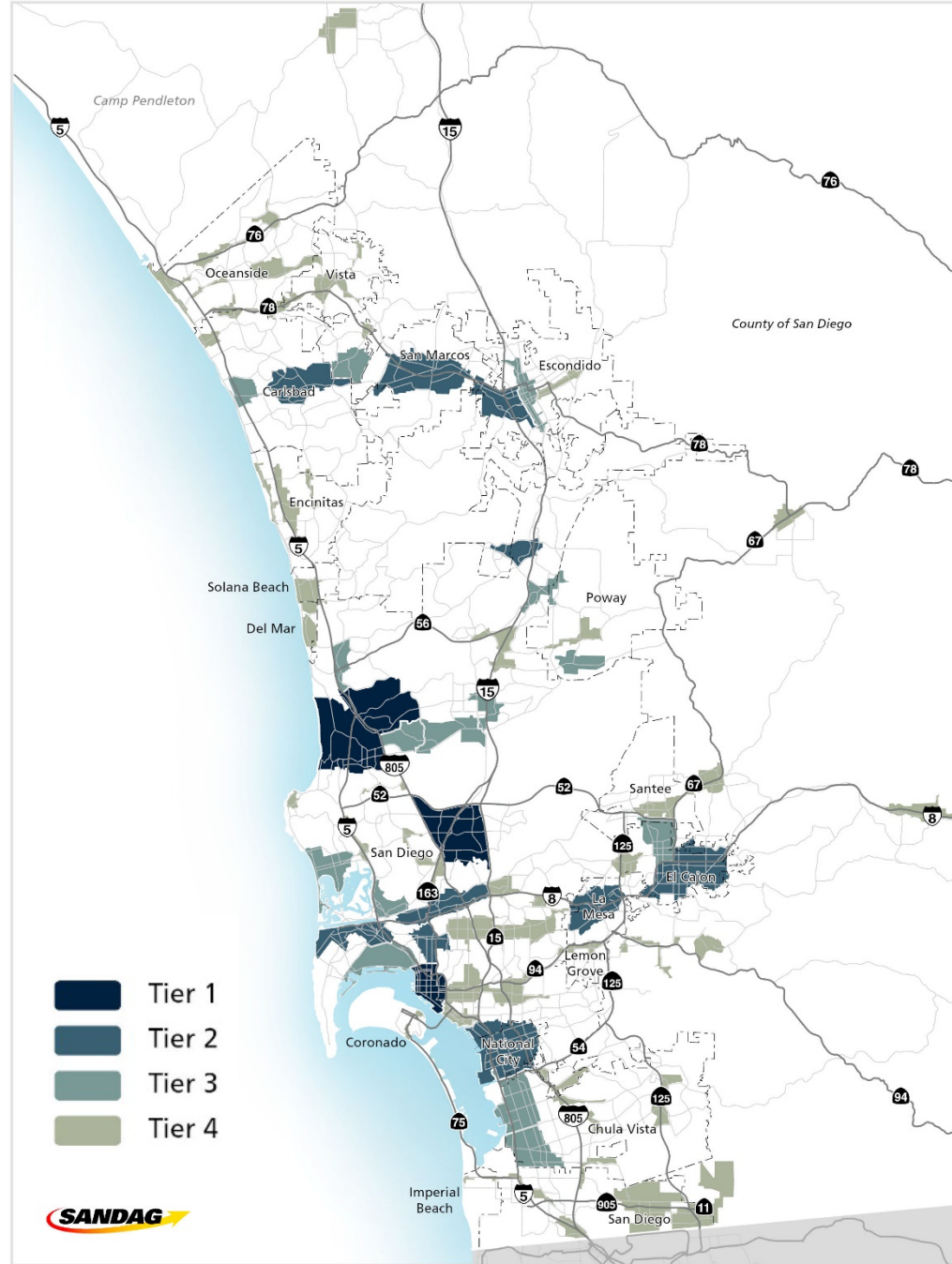


Employment Centers

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

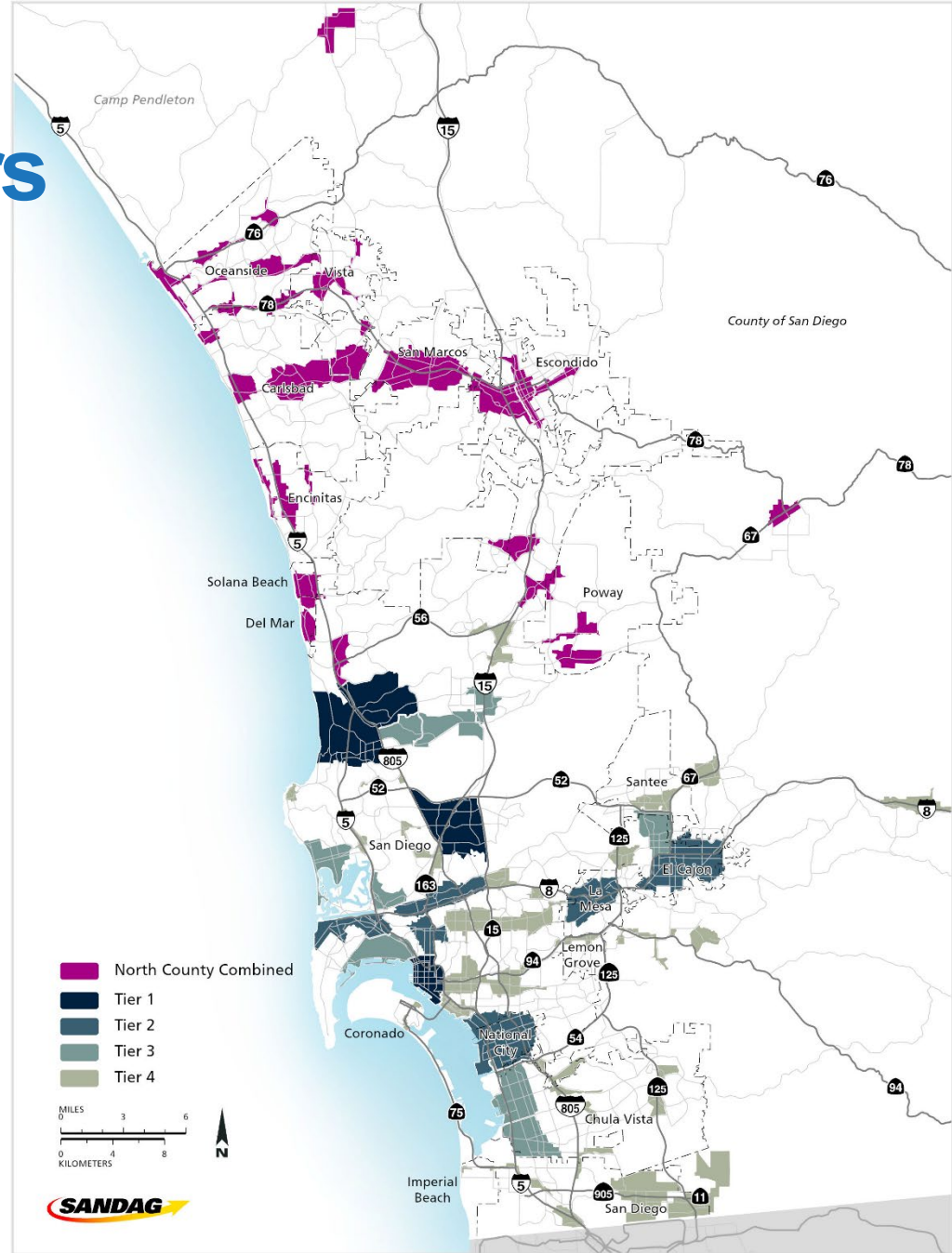
14,000 Businesses

350,000 Jobs

\$57,000 Avg. Salary

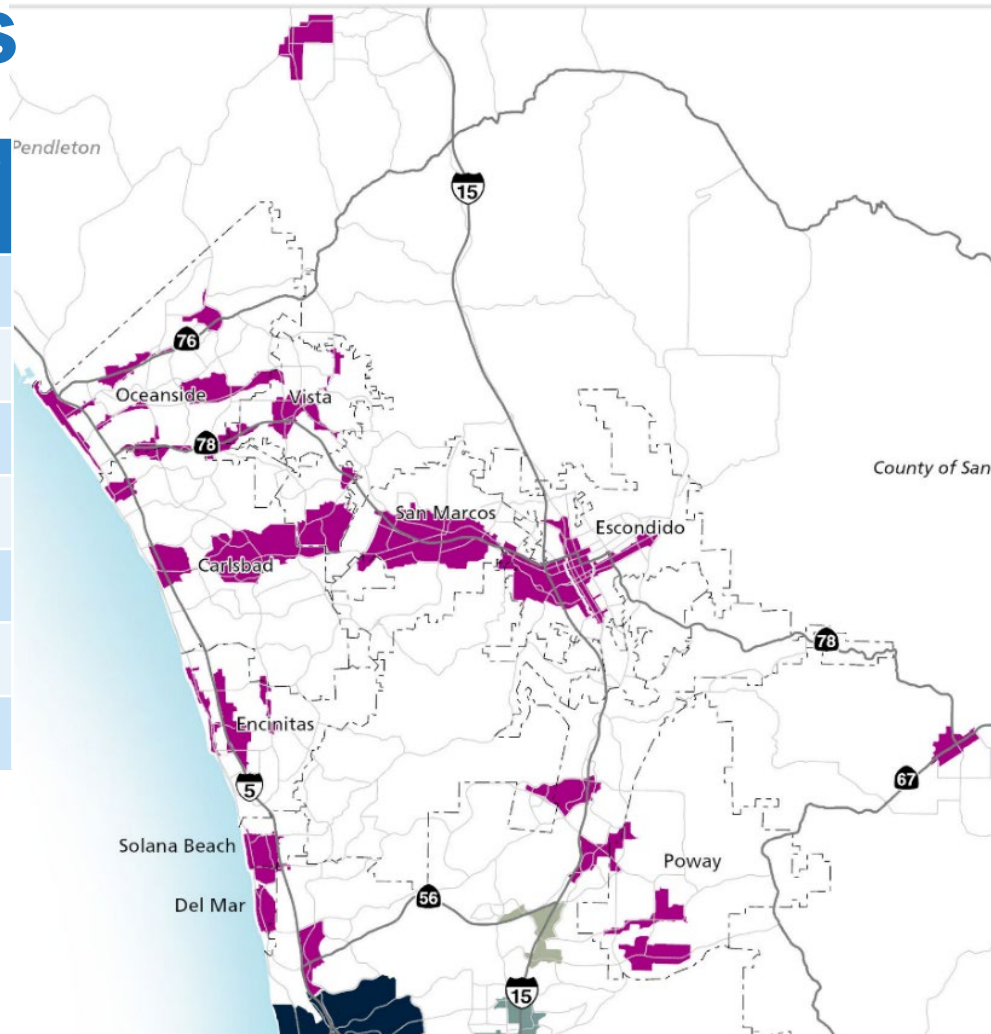
7.5 million Daily VMT

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
Total	352,462	7,470,827	10.6



1 out of 2 businesses

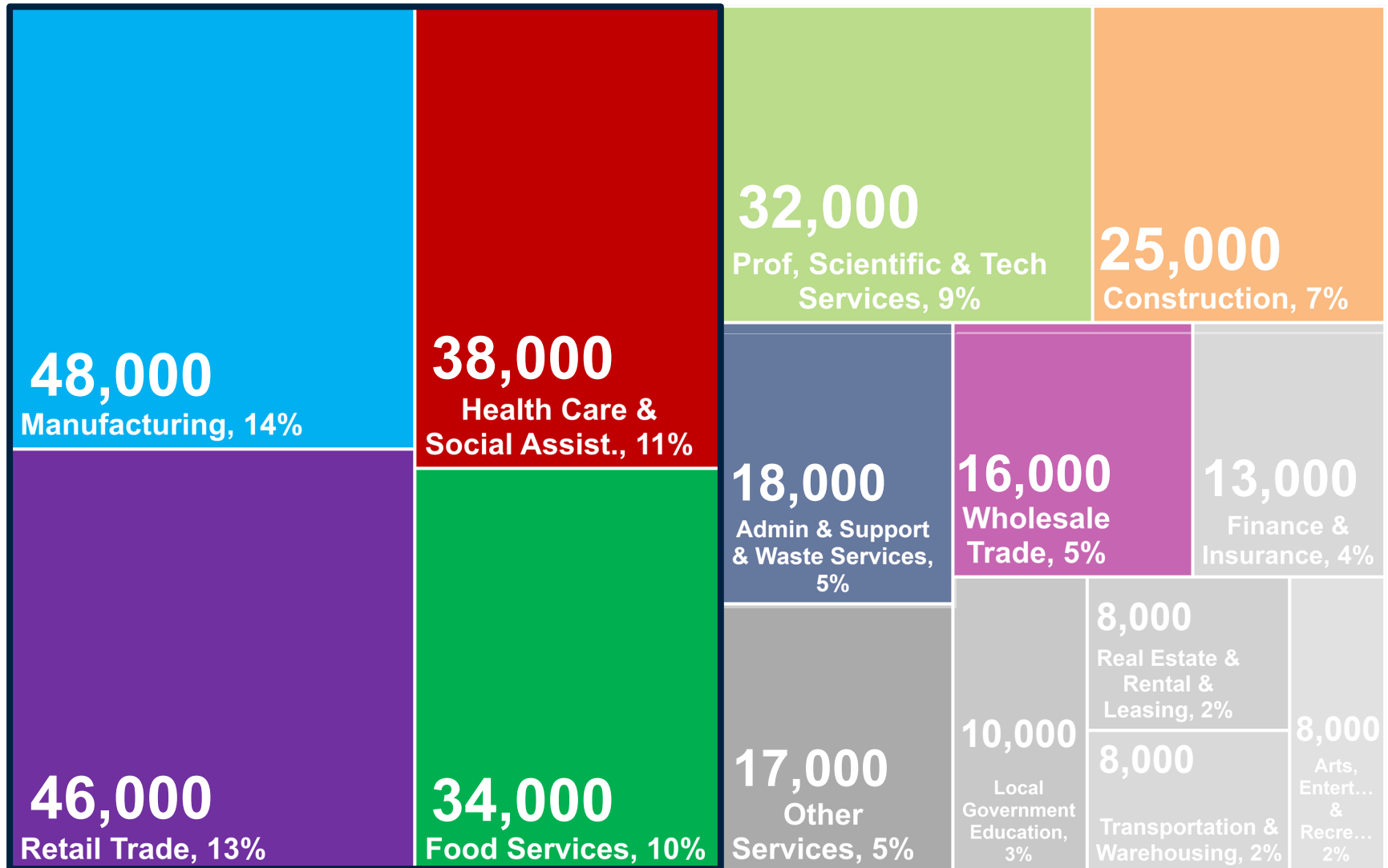
(14,000 out of 25,000)

78% of jobs

(352K out of 456K)

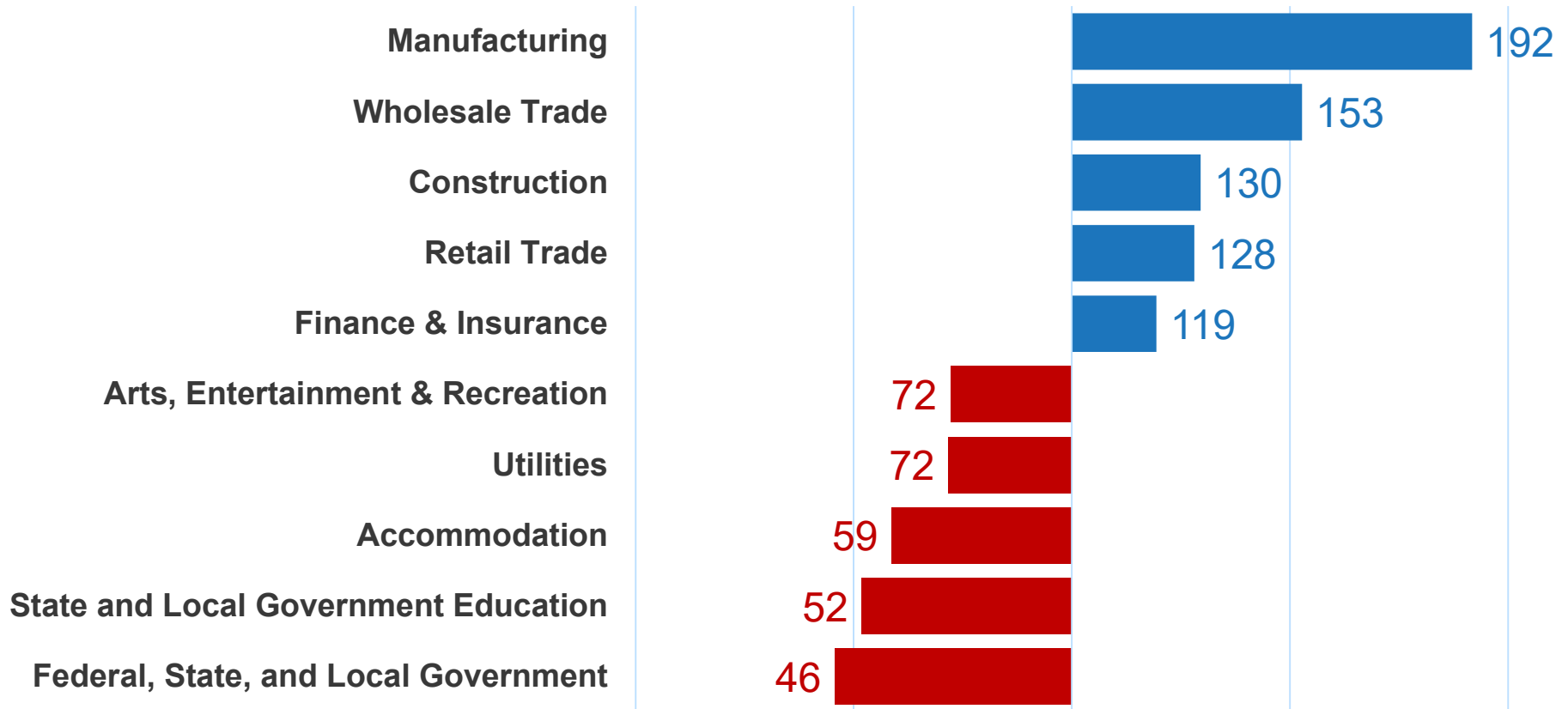
North County Employment Centers

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

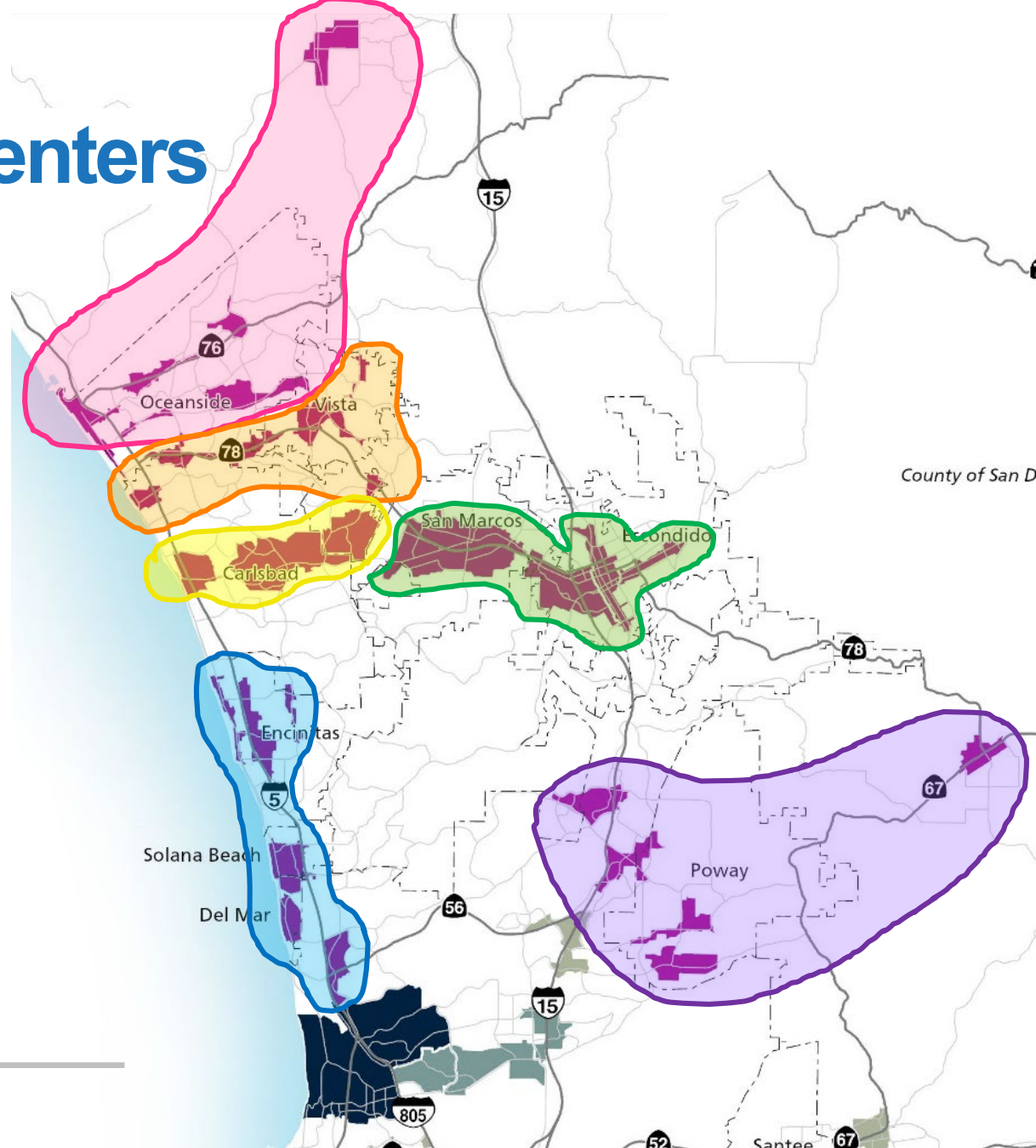
(Green)

Coastal

(Blue)

I-15

(Purple)



Oceanside Area

Count: 6

Food Services; Manufacturing; Retail

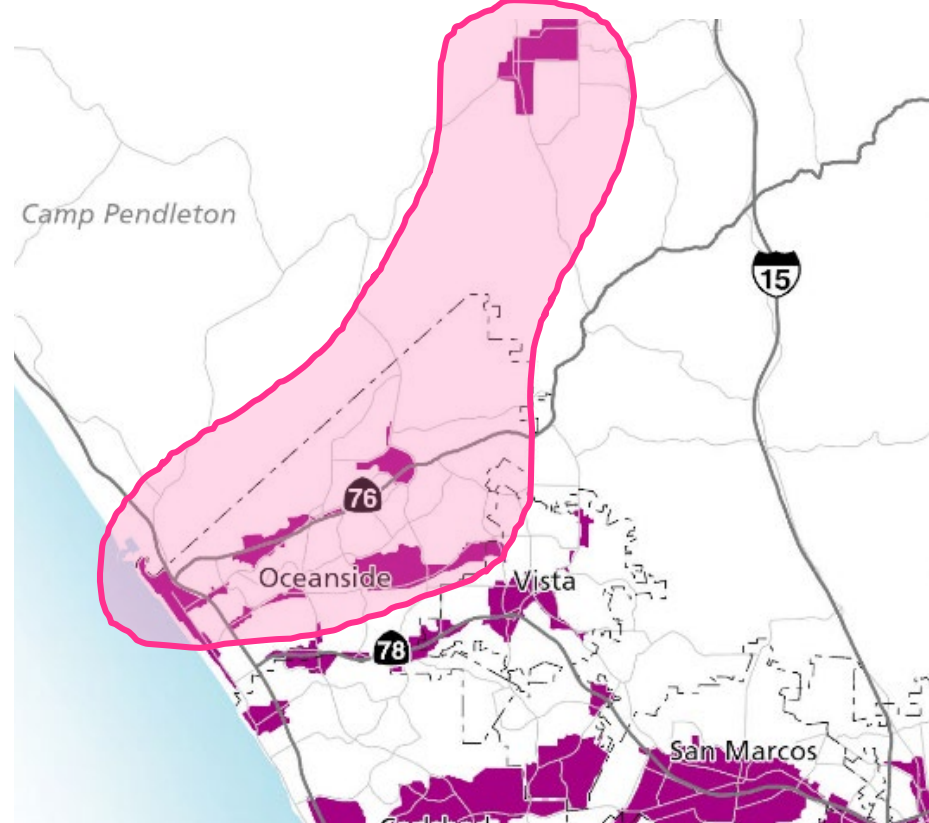
1,700 Businesses

34,000 Jobs

\$42,000 Average Salary

600,000 Daily VMT

8.5 miles Average Trip Length



13%	Food Services
13%	Manufacturing
13%	Retail Trade
8%	Health Care & Social Assist
53%	All Other

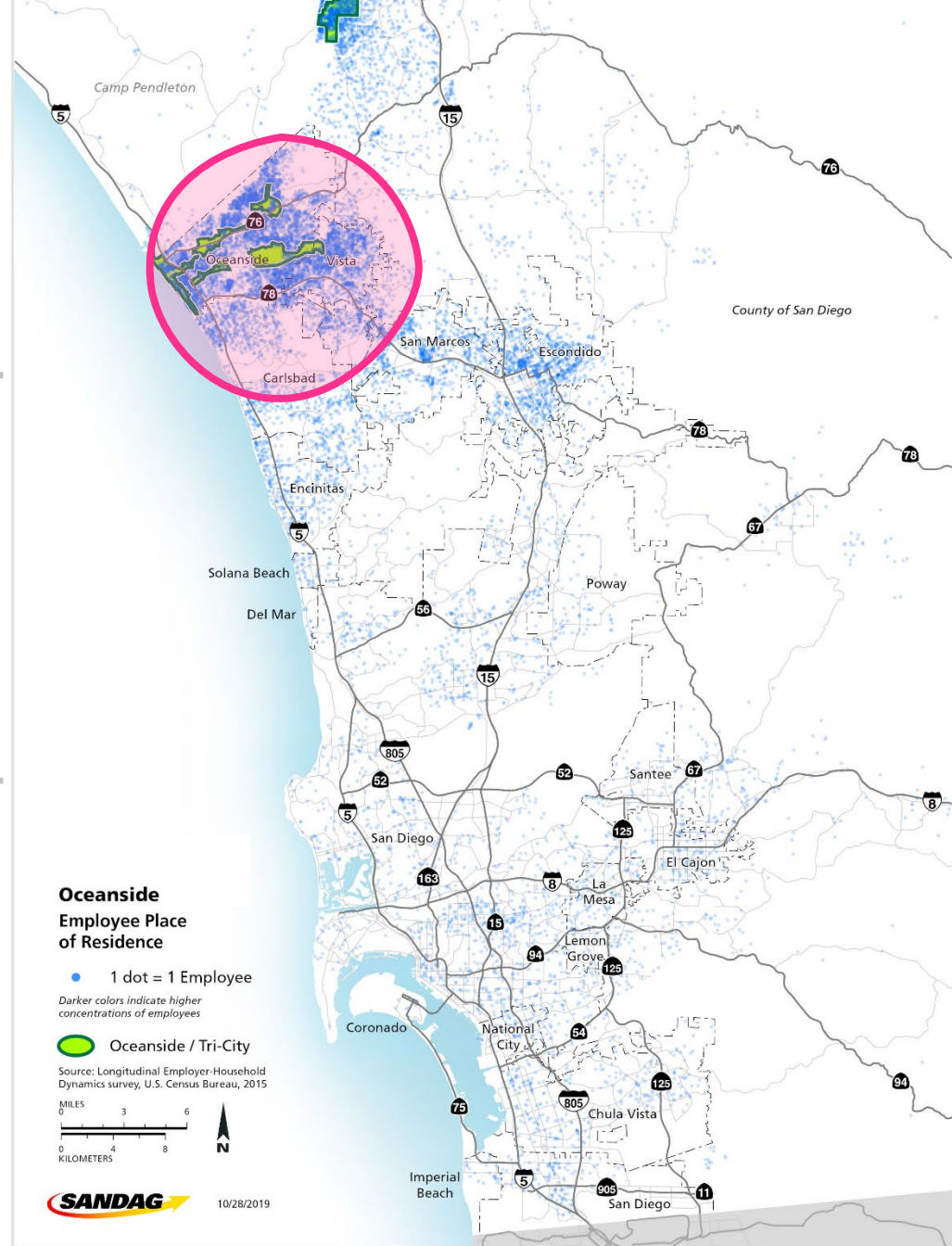
Oceanside Area	Jobs	Vehicle Miles Traveled	Average Trip Length
Fallbrook	5,960	96,973	8.1
Oceanside – Oceanside Blvd	2,583	44,853	8.7
Oceanside - Mission	5,249	97,333	9.3
Oceanside - Old Grove	2,325	33,206	7.1
Oceanside - Rancho Del Oro	9,785	151,569	7.7
Oceanside Civic Center	8,300	156,120	9.4
Total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

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

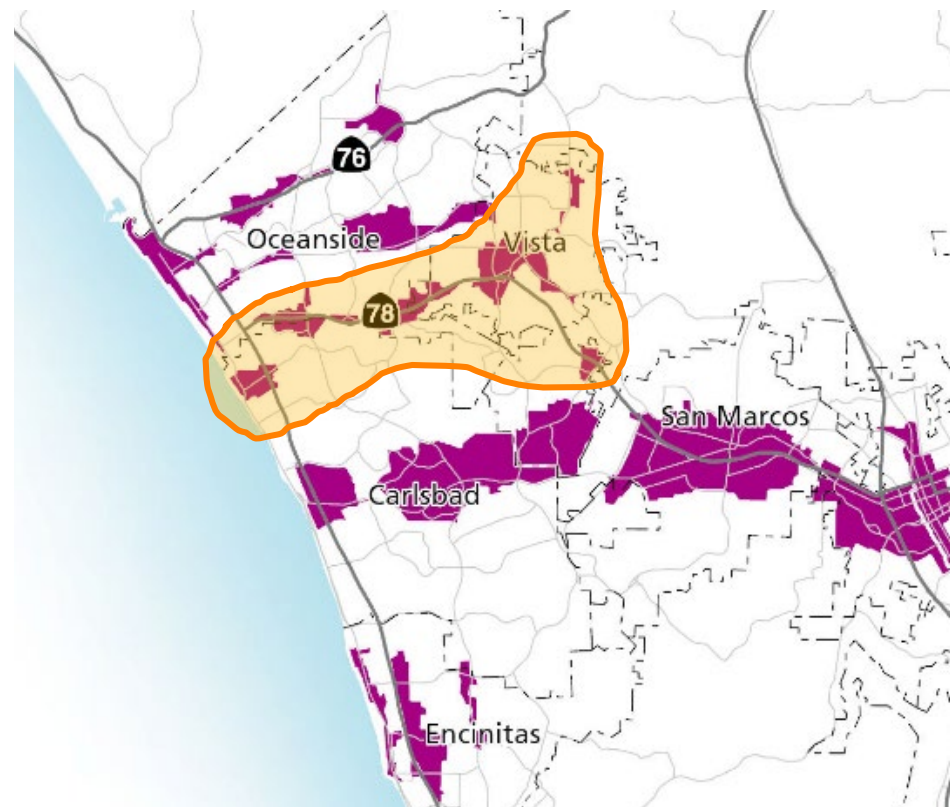
1,800 Businesses

37,000 Jobs

\$37,000 Average Salary

600,000 Daily VMT

8.4 miles Average Trip Length



23%

Health Care and Social Assist

23%

Retail Trade

54%

All Other

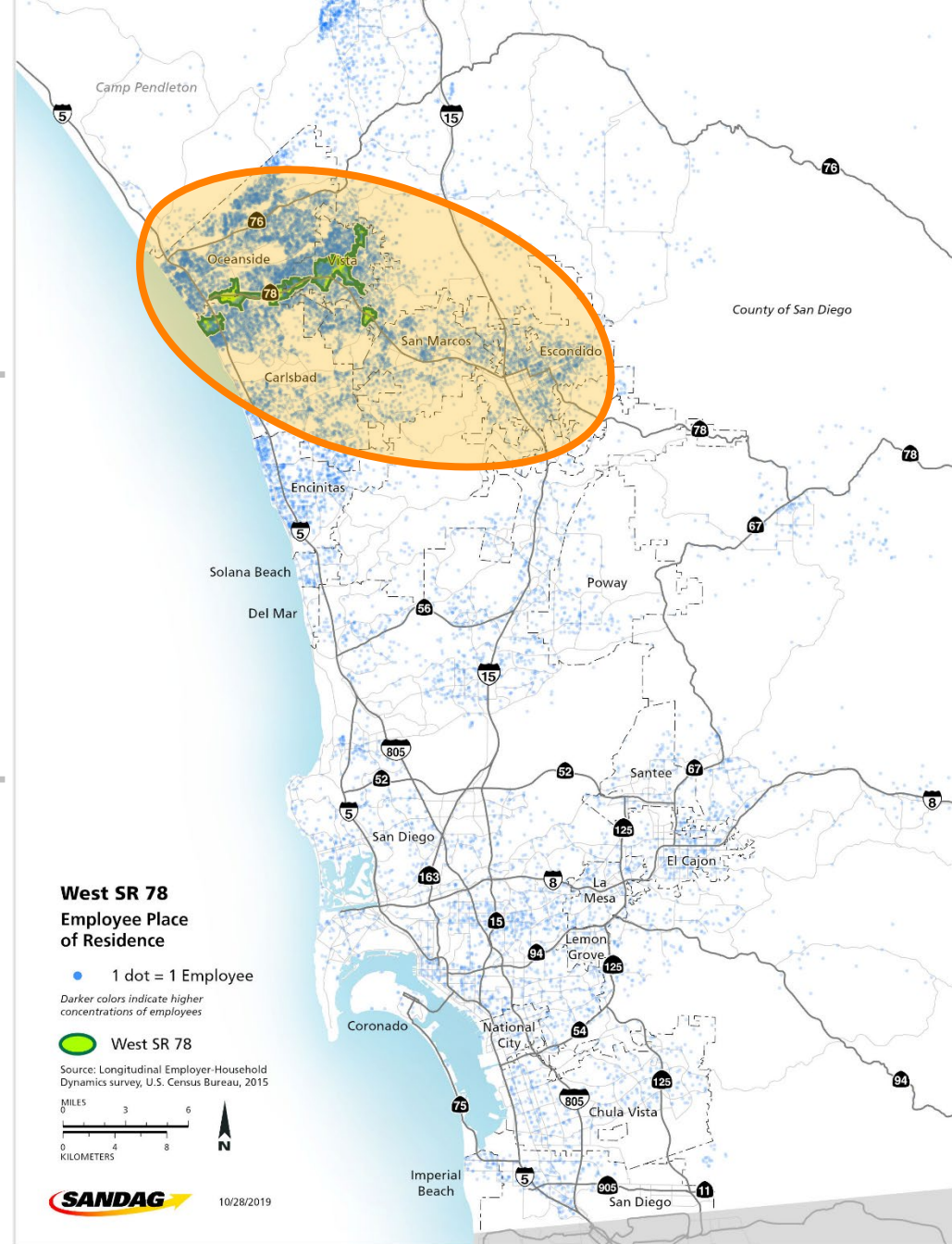
West 78	Jobs	Vehicle Miles Traveled	Average Trip Length
Carlsbad Village	7,684	147,082	9.6
El Camino	6,816	112,292	8.2
Oceanside Tri-city	8,377	133,208	8.0
Vista Guajome	2,877	49,998	8.7
Vista Sycamore	2,631	47,528	9.0
Vista Village	8,072	123,713	7.7
Total	36,457	613,821	8.4

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

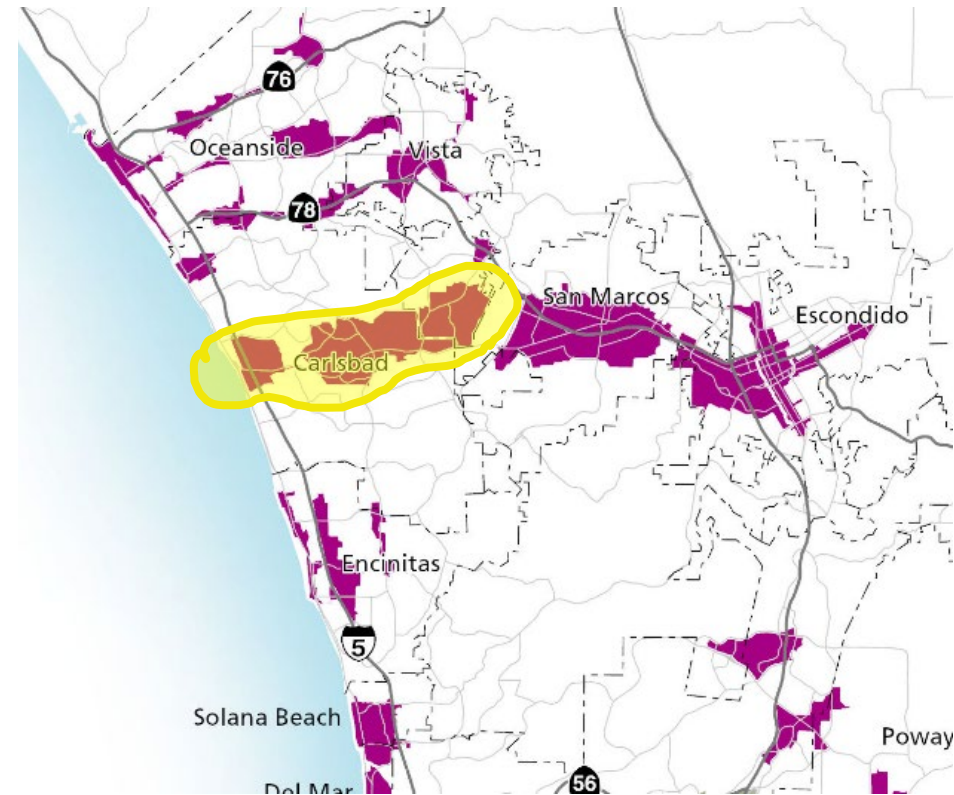
2,000 Businesses

73,000 Jobs

\$67,000 Average Salary

1.4 million Daily VMT

9.8 miles Average Trip Length



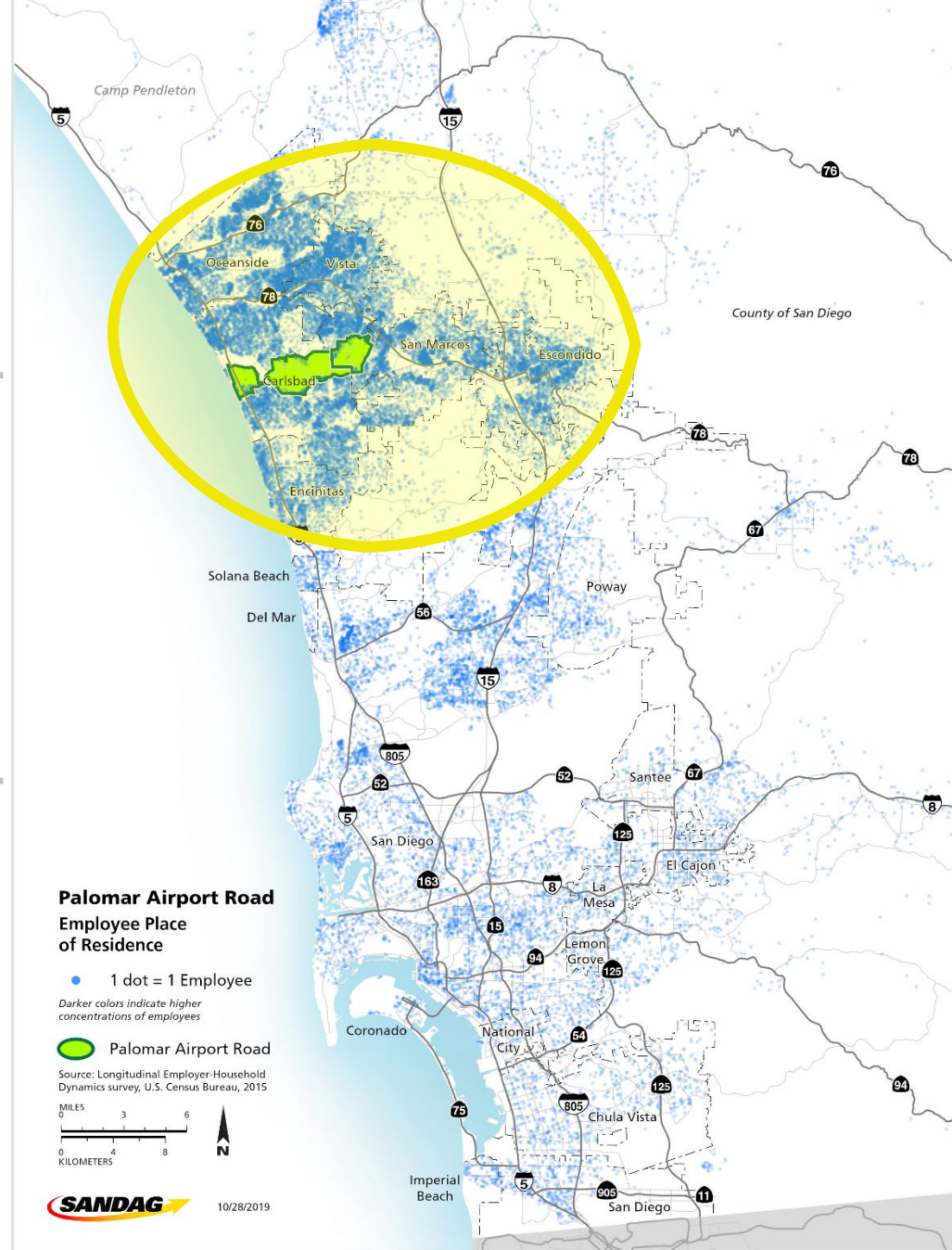
Palomar Airport Road	Jobs	Vehicle Miles Traveled	Average Trip Length
Carlsbad Palomar Airport	36,055	702,426	9.7
Vista Tech Park	20,943	388,391	9.3
Carlsbad State Beach	15,648	335,248	10.7
Total	72,646	1,426,065	9.8

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

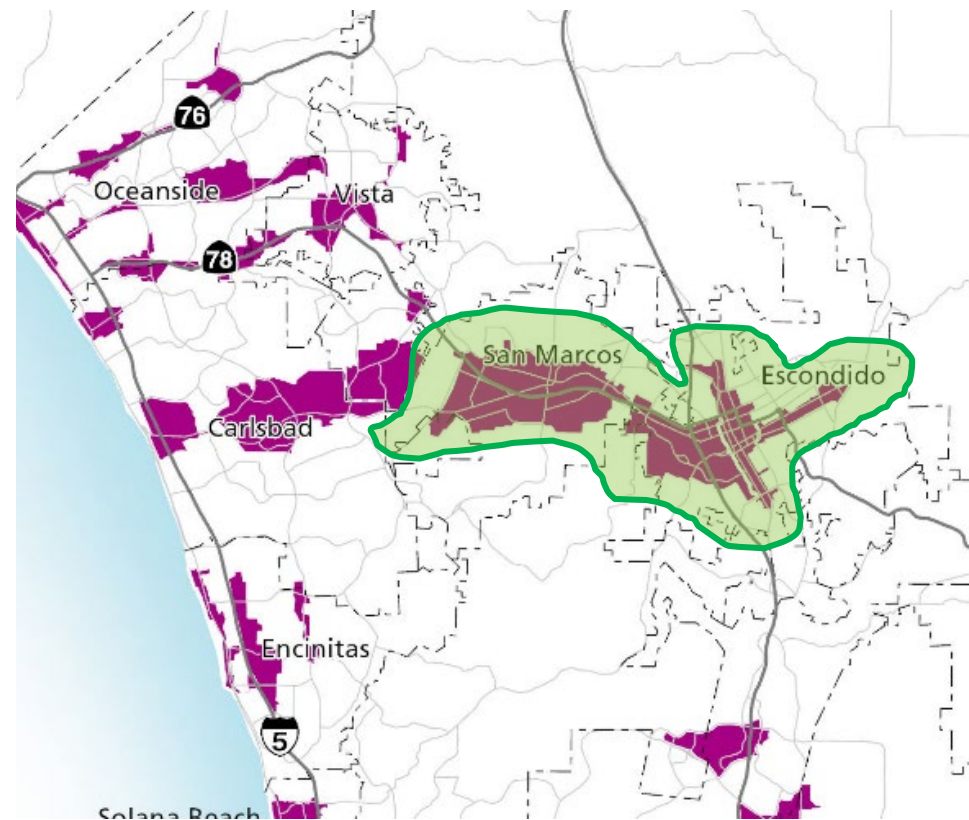
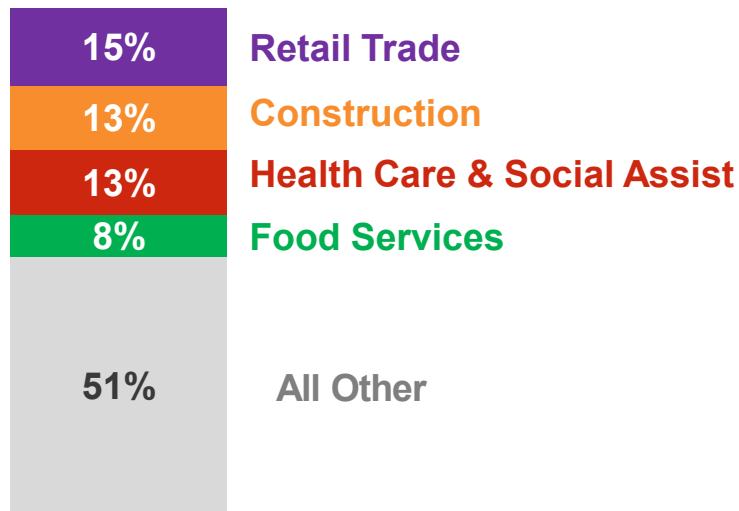
3,500 Businesses

86,000 Jobs

\$48,000 Average Salary

1.6 million Daily VMT

9.7 miles Average Trip Length



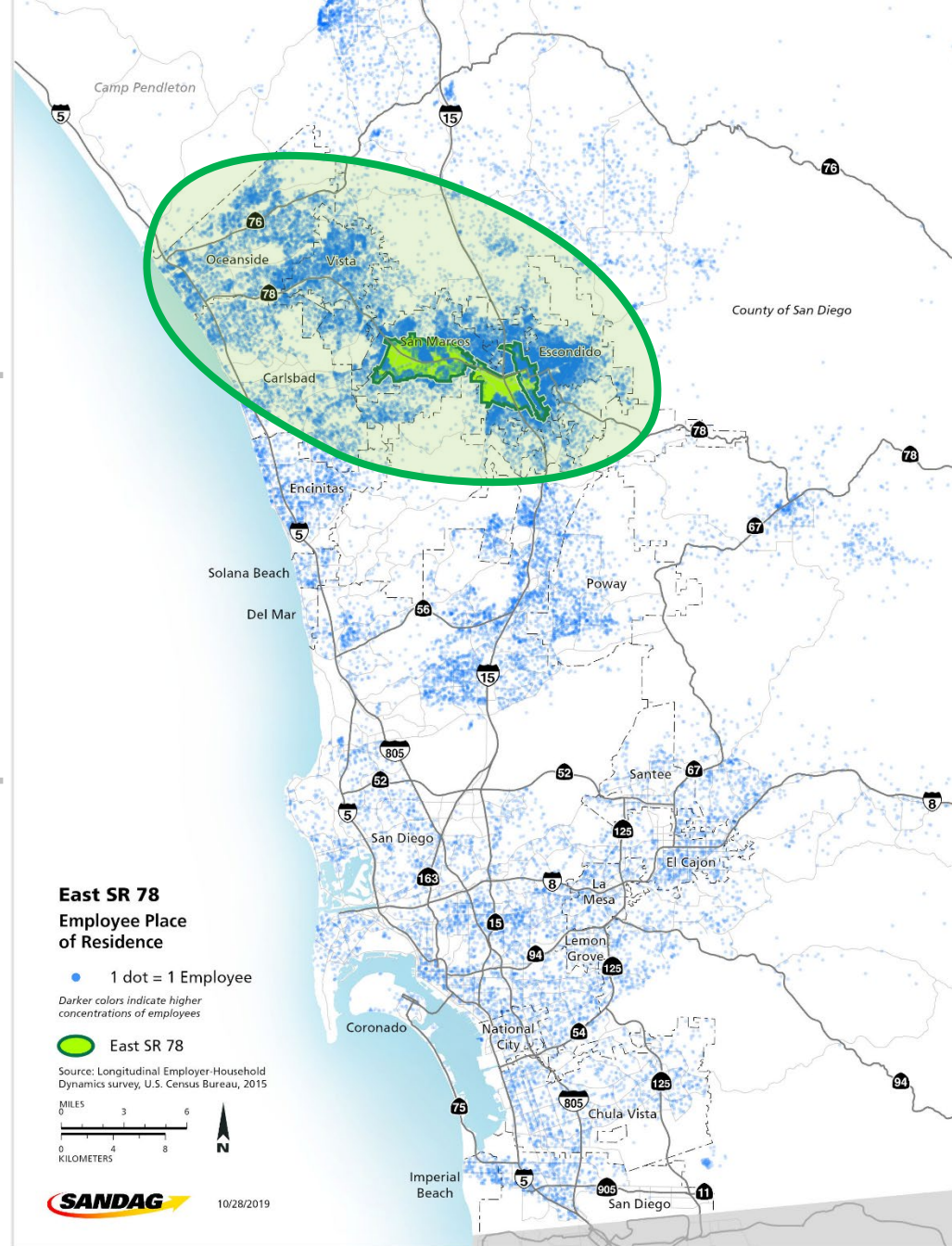
East 78	Jobs	Vehicle Miles Traveled	Average Trip Length
Escondido - Midway	6,725	125,990	9.4
Escondido - Palomar	30,644	639,037	10.4
Escondido Centre City	15,130	293,076	9.7
San Marcos Civic Center	33,016	607,284	9.2
Total	85,515	1,665,387	9.7

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

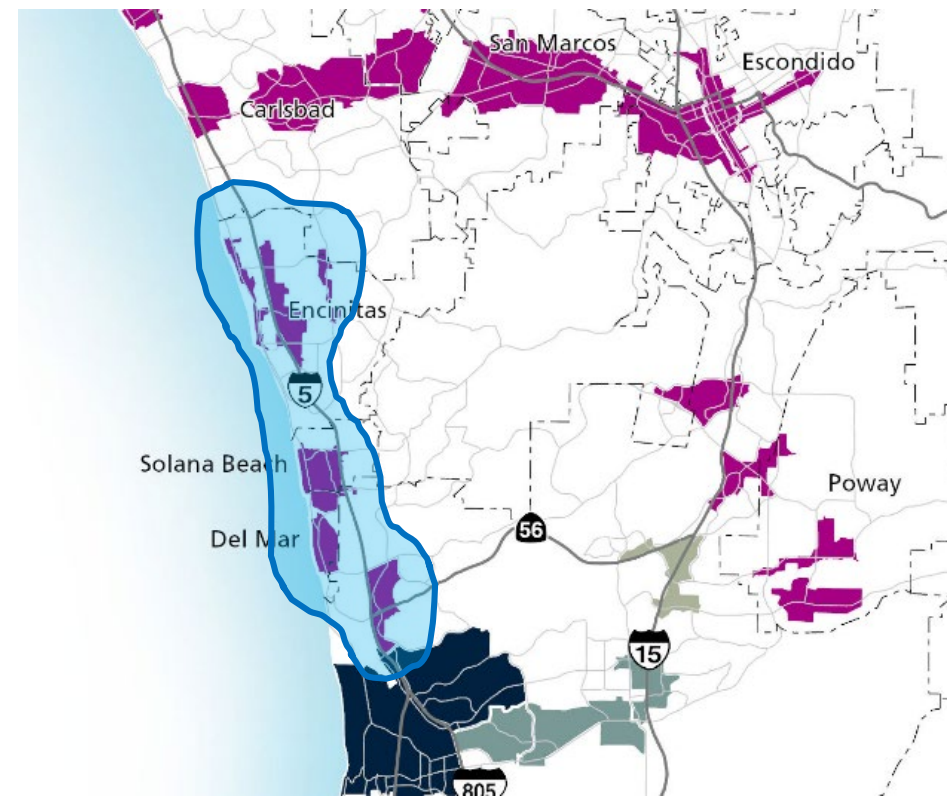
3,000 Businesses

50,000 Jobs

\$65,000 Average Salary

1.3 million Daily VMT

13.0 miles Average Trip Length



17%

Food Service

13%

Prof, Scientific & Tech Services

12%

Retail Trade

10%

Health Care and Social Assist

48%

All Other

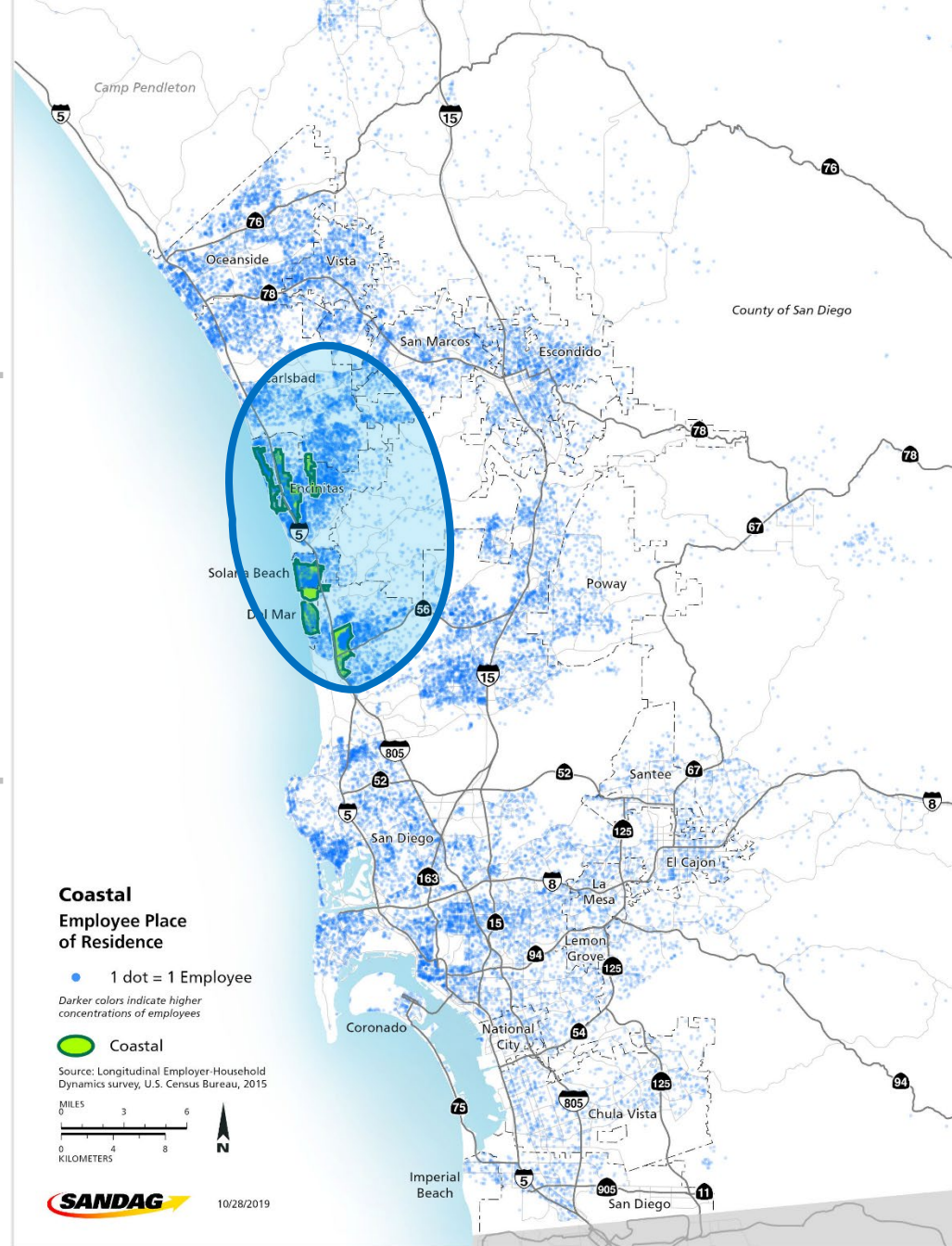
Coastal	Jobs	Vehicle Miles Traveled	Average Trip Length
Carmel Valley	15,188	400,629	13.2
Del Mar	3,128	89,497	14.3
Encinitas - I-5 Eastward	5,857	143,711	12.3
Encinitas - La Costa	6,524	145,835	11.2
Encinitas Beach	7,369	182,605	12.4
Solana Beach	11,813	332,190	14.1
Total	49,879	1,294,466	13.0

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

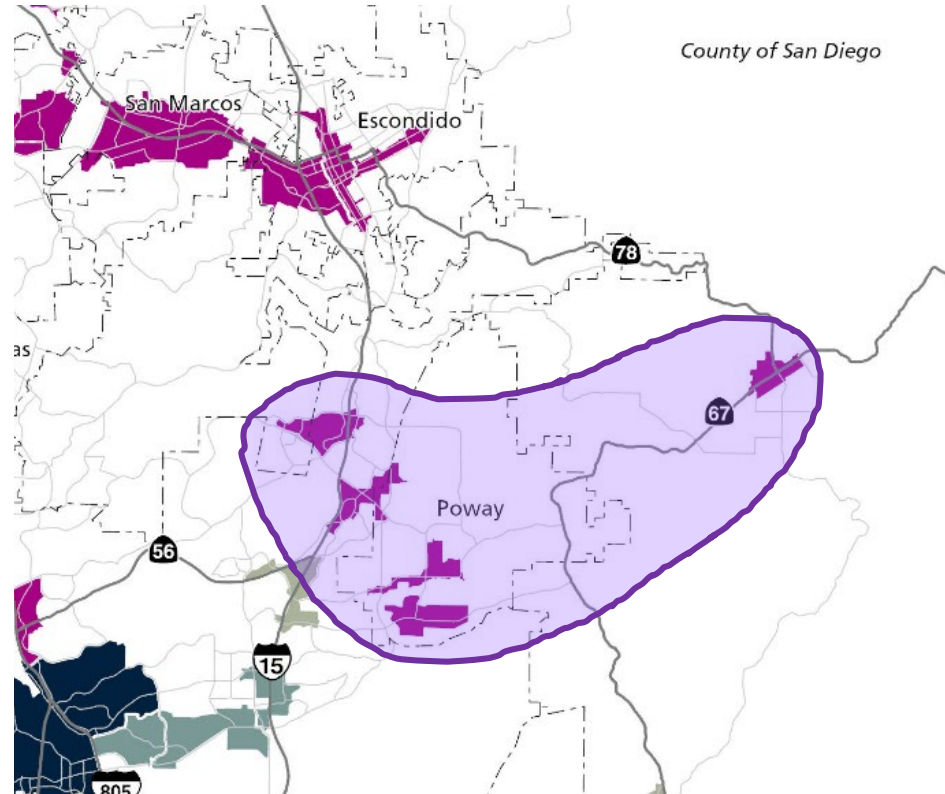
2,200 Businesses

74,000 Jobs

\$68,000 Average Salary

1.9 million Daily VMT

12.8 miles Average Trip Length



24%	Manufacturing
12%	Prof, Scientific, and Tech Services
12%	Health Care & Social Assist
52%	All Other

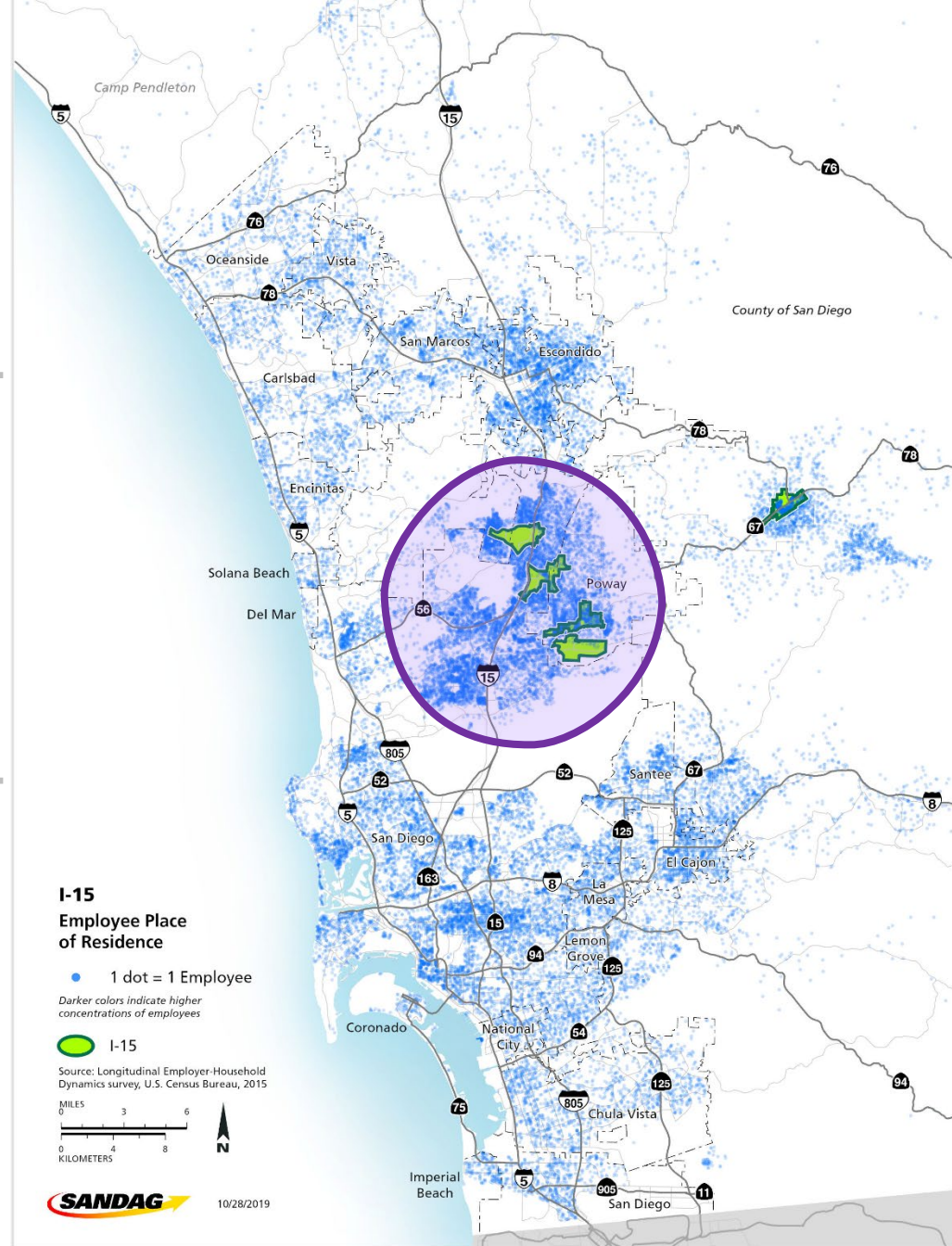
I-15	Jobs	Vehicle Miles Traveled	Average Trip Length
Poway	6,609	171,367	13.0
Ramona	3,930	89,925	11.4
Rancho Bernardo	16,542	414,844	12.5
Scripps Poway	21,575	600,390	13.9
West Bernardo	25,107	614,506	12.2
Total	73,763	1,891,033	12.8

I-15

Employees Place of Residence

74,000 Total employees

31% Live in the area around I-15



Learn More

sandag.org/EmploymentCenters



Contact

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