



# WORKER COMMUTING PATTERNS IN NORTH COUNTY

**A COMPLEMENTARY CORRIDOR IN ACTION**

# EXECUTIVE SUMMARY

**The majority of workers do not live and work in the same SR 78 City.**

- 43,860 workers live and work in the same City
- 63,829 live in one SR 78 City and commute to another



**Nearly two-thirds (63%) of workers live and work within North County, rather than commuting in or leaving the area for employment.**

**SR78 is busier than most state highways and rivals interstates as measured by Annual Average Daily Trips.**





# **COMMUTING & THE SR 78 CORRIDOR**

The freeway portion of the State Route 78 stretches about 18 miles from North of downtown Escondido to Interstate 5 at the border of Oceanside and Carlsbad. The five cities along the route have a total population of 631,525\* and a total workforce of 294,900.\*\*

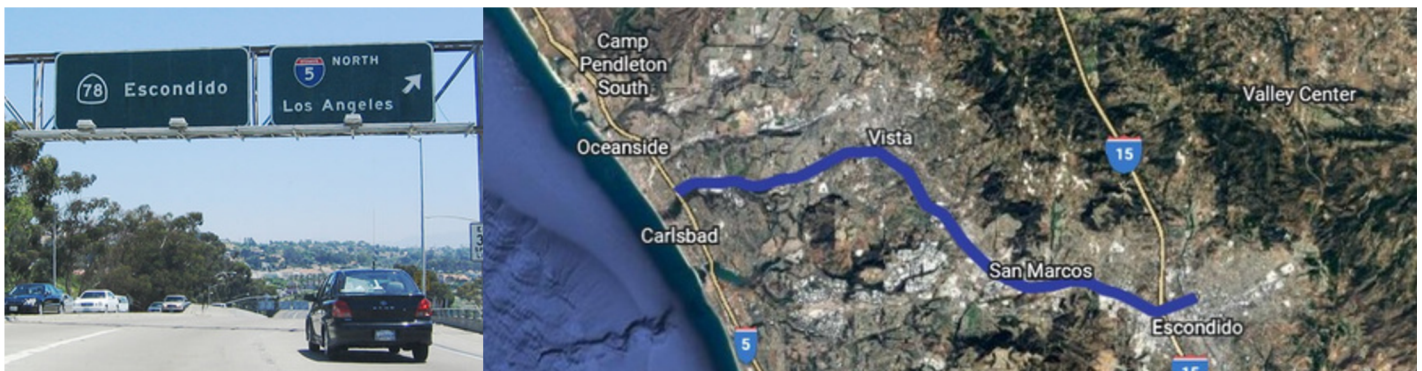
If the cities along SR 78 were a single municipality, they would be the state's fifth-largest, just behind San Francisco, San Jose, San Diego, and Los Angeles. Decades of growth have blurred their borders, with arterial roads supplementing SR 78 to provide key connections for work and recreation.

***SDNEDC is committed to the idea that North County does better when these cities work together to create a better economic climate for North County businesses and residents as a whole.***

To explore these synergies, SDNEDC analyzed U.S. Census Bureau data from the Longitudinal Employer-Household Dynamics (LEHD) program, which integrates state-shared Unemployment Insurance earnings and Quarterly Census of Employment and Wages (QCEW).

This tool allowed us to examine employment patterns by linking workers' home and workplace locations. Job numbers may appear lower because they include only W-2 workers for whom the Census Bureau could establish both a home and workplace address.

Additionally, this analysis considers only "primary" jobs—defined as the job where an individual earns the most income—ensuring that workers with multiple jobs are not double-counted. This methodology provides a clearer picture of employment trends and workforce distribution within the region.



\* Ca Department of Finance, E-5 Estimate    \*\* California Employment Development Department  
Data includes all 2022 jobs; generated 01/13/2025.

# **SUMMARY TABLE**

The chart below details how many primary jobs are available in each SR 78 City, how many workers reside in each SR 78 City, and where those residents commute for work.

City	Live & Work within the Same City	Work in another SR 78 City	Total Workers in the SR 78 Corridor	Total Primary Jobs
Oceanside	12,209	19,913	32,122	42,318
Carlsbad	10,145	6,671	16,816	73,515
Vista	5,194	14,293	19,487	32,138
San Marcos	5,270	10,925	16,195	35,549
Escondido	11,042	12,027	23,069	49,101
TOTAL	43,860	63,829	107,689	171,518

## **Key Takeaways from This Chart:**

- 26% of all primary jobholders live and work within the same city
- 37% of all primary jobholders live in one SR 78 City but work in another
- 63% of all workers live and work in the SR 78 Corridor
- 37% work live along the SR 78 Corridor but work outside of it

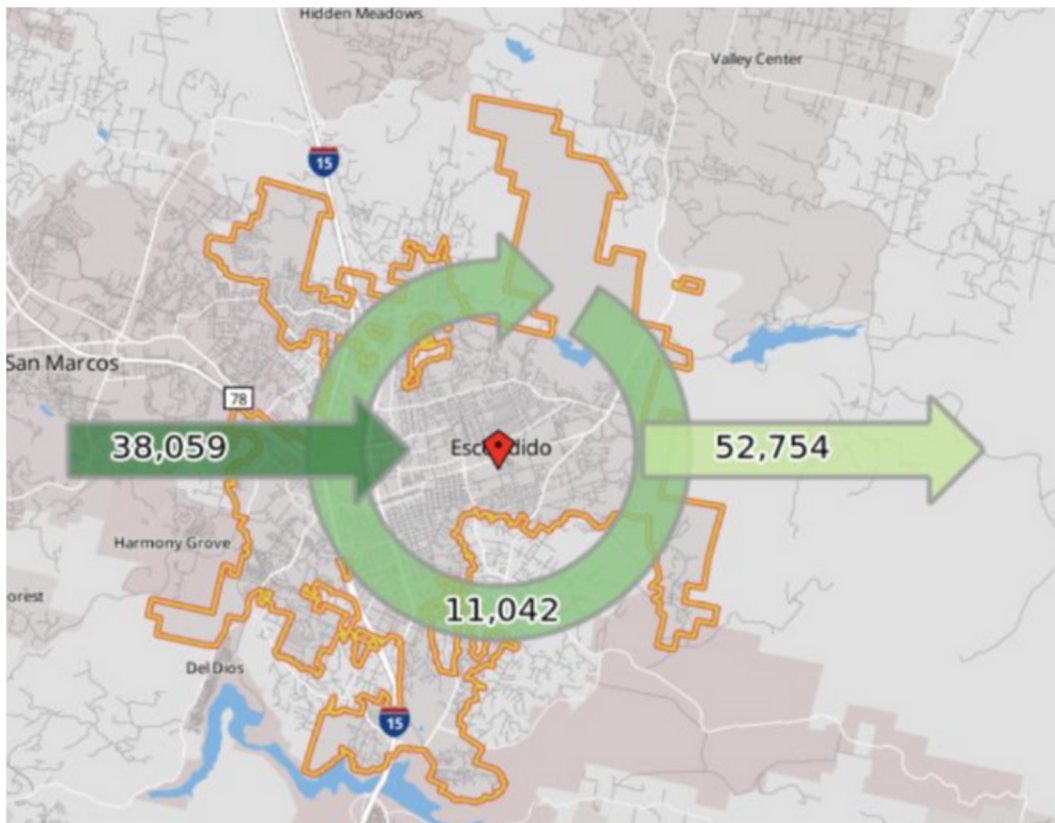


## CORRIDOR TALENT REPORT

**TOTAL PRIMARY JOBS: 49,101**

THE CITY OF ESCONDIDO CONTRIBUTES **19,487 WORKERS** TO THE WORKFORCE ALONG THE SR 78 CORRIDOR.

OF THOSE WORKERS, **48%** BOTH LIVE AND WORK WITHIN ESCONDIDO CITY LIMITS, WHILE **52%** LIVE IN ESCONDIDO AND COMMUTE TO WORK IN ANOTHER SR 78 CITY.



- 11,042 RESIDENTS WORK AND LIVE IN THE CITY OF ESCONDIDO
- 52,754 LIVE IN ESCONDIDO BUT WORK ELSEWHERE
- 38,059 LIVE ELSEWHERE BUT COMMUTE INTO ESCONDIDO



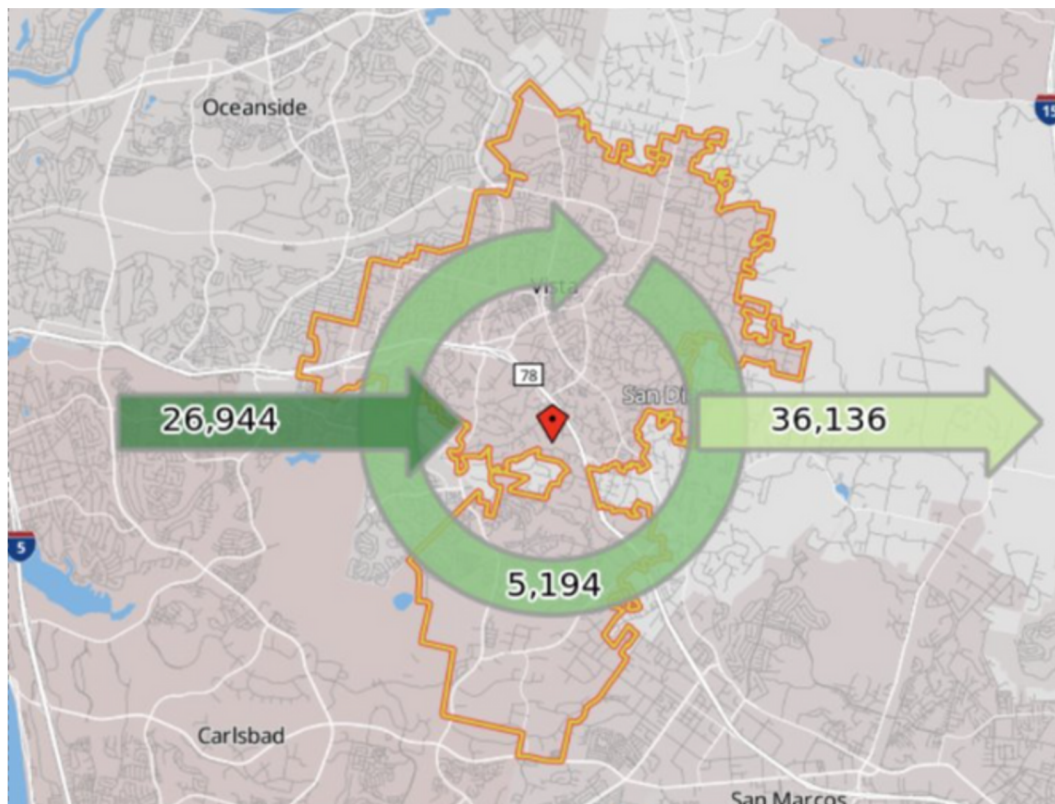


## CORRIDOR TALENT REPORT

**TOTAL PRIMARY JOBS: 32,138**

THE CITY OF VISTA CONTRIBUTES **23,069 WORKERS** TO THE WORKFORCE ALONG THE SR 78 CORRIDOR.

OF THOSE WORKERS, **27%** BOTH LIVE AND WORK WITHIN VISTA CITY LIMITS, WHILE **73%** LIVE IN VISTA AND COMMUTE TO WORK IN ANOTHER SR 78 CITY.



- 5,194 RESIDENTS WORK AND LIVE IN THE CITY OF VISTA
- 36,136 LIVE IN VISTA BUT WORK ELSEWHERE
- 26,944 LIVE ELSEWHERE BUT COMMUTE INTO VISTA

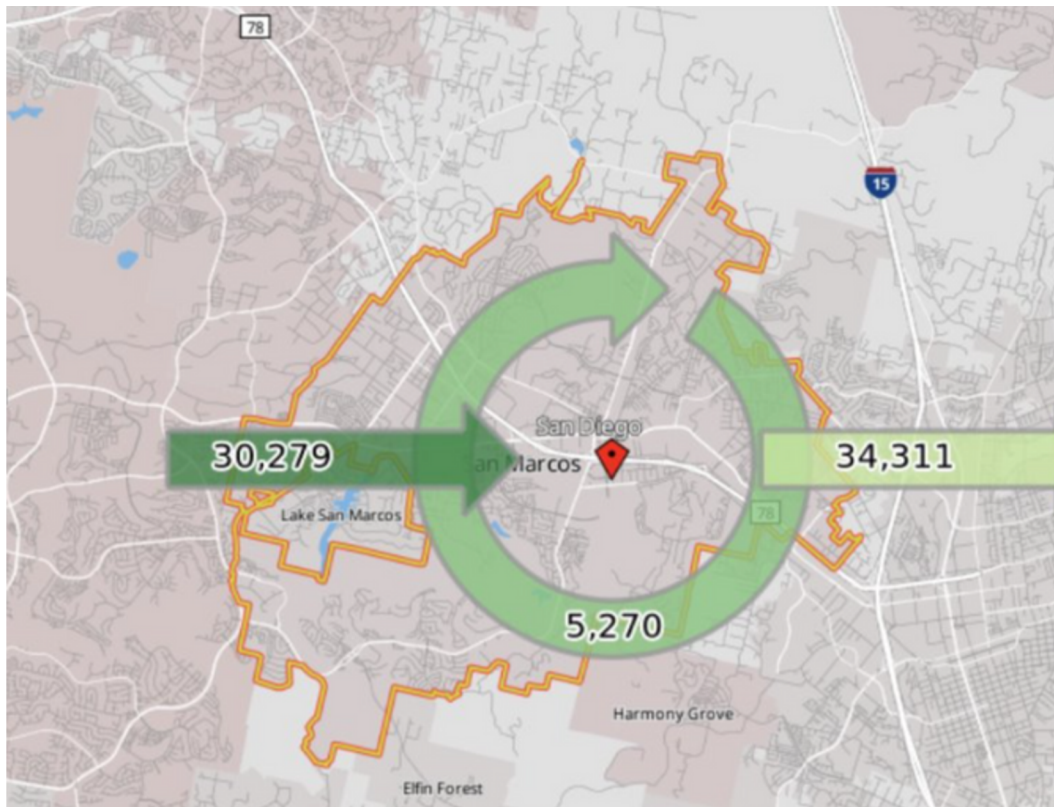
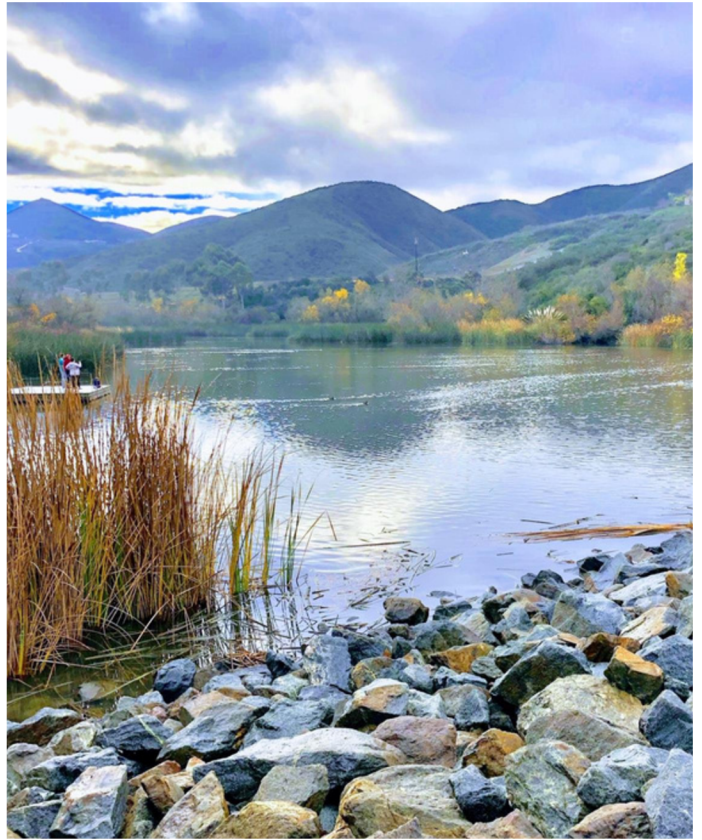


## CORRIDOR TALENT REPORT

**TOTAL PRIMARY JOBS: 35,549**

THE CITY OF SAN MARCOS CONTRIBUTES **16,195 WORKERS** TO THE WORKFORCE ALONG THE SR 78 CORRIDOR.

OF THOSE WORKERS, **33%** BOTH LIVE AND WORK WITHIN SAN MARCOS CITY LIMITS, WHILE **67%** LIVE IN SAN MARCOS AND COMMUTE TO WORK IN ANOTHER SR 78 CITY.



- 5,270 RESIDENTS WORK AND LIVE IN THE CITY OF SAN MARCOS
- 34,311 LIVE IN SAN MARCOS BUT WORK ELSEWHERE
- 30,279 LIVE ELSEWHERE BUT COMMUTE INTO SAN MARCOS



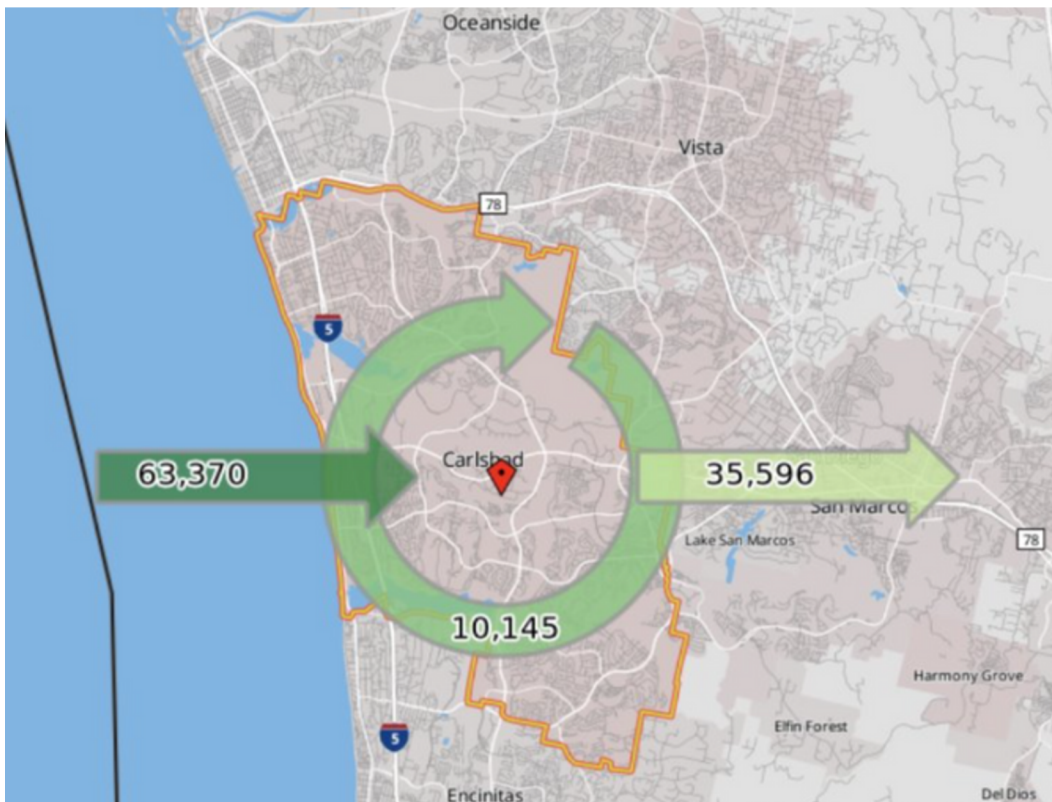
# City of Carlsbad

## CORRIDOR TALENT REPORT

**TOTAL PRIMARY JOBS: 73,515**

THE CITY OF CARLSBAD CONTRIBUTES **16,816 WORKERS** TO THE WORKFORCE ALONG THE SR 78 CORRIDOR.

OF THOSE WORKERS, **60% BOTH LIVE AND WORK WITHIN CARLSBAD CITY LIMITS**, WHILE **40% LIVE IN CARLSBAD AND COMMUTE TO WORK IN ANOTHER SR 78 CITY**.



- 10,145 RESIDENTS WORK AND LIVE IN THE CITY OF CARLSBAD
- 35,596 LIVE IN CARLSBAD BUT WORK ELSEWHERE
- 63,370 LIVE ELSEWHERE BUT COMMUTE INTO CARLSBAD



## CORRIDOR TALENT REPORT

**TOTAL PRIMARY JOBS: 42,318**

THE CITY OF OCEANSIDE CONTRIBUTES **32,122 WORKERS** TO THE WORKFORCE ALONG THE SR 78 CORRIDOR.

OF THOSE WORKERS, **38%** BOTH LIVE AND WORK WITHIN OCEANSIDE CITY LIMITS, WHILE **62%** LIVE IN OCEANSIDE AND COMMUTE TO WORK IN ANOTHER SR 78 CITY.



- 12,209 RESIDENTS WORK AND LIVE IN THE CITY OF OCEANSIDE
- 56,193 LIVE IN OCEANSIDE BUT WORK ELSEWHERE
- 30,109 LIVE ELSEWHERE BUT COMMUTE INTO OCEANSIDE



# **SR 78 TRAFFIC IN PERSPECTIVE**

The SR 78 corridor plays a critical role in regional talent migration, facilitating the movement of thousands of workers across North County. As shown in the data below, SR 78 at Nordahl Road sees an Annual Average Daily Trip (AADT) count of 160,000—higher than many state highways and rivaling traffic levels on major interstates. This heavy volume underscores the corridor’s importance as a workforce connector, linking residents to jobs both within and outside their home cities.

Compared to other state highways, such as SR 163 (96,000 AADT) and SR 56 (67,000 AADT), SR 78 experiences significantly higher usage, reflecting the intense economic activity and commuter reliance in the area. While interstates like I-5 and I-15 still carry greater volumes, SR 78’s traffic levels suggest that it functions similarly to an interstate in terms of workforce mobility.

Given the corridor’s status as a talent migration hub, investment in infrastructure improvements and alternative transit options could help sustain economic growth while improving the ease of workforce movement within the region.

\*All figures represent the highest Average Annual Daily Count figures

## **2022 traffic count (in Annual Average Daily Trips):**

- State Highways:
  - SR 78 at Nordahl Rd: 160,000
  - SR 163 at Robinson Ave (Balboa Park): 96,000
  - SR 56 at Rancho Penasquitos Blvd: 67,000
  - SR 52 at Mast Blvd (Santee): 86,000
  
- Interstates
  - I-805 at Claremont Mesa Blvd: 199,000
  - I-5 at Del Mar Heights: 235,000
  - I-15 at Miramar Way: 259,000

## **KEY TAKEAWAYS**

- The fate of companies and the economic well-being of residents within each city are highly impacted by *sub-regional* and *regional* trends.
- Quality of life in neighboring cities is important. Currently, every SR 78 city sources more talent from other SR 78 cities than from within their own.
- SDNEDC recognizes that conditions along the SR 78 Corridor are pertinent to each of the five cities and is committed to helping the sub-region work together as a whole to develop their economies.