



Employment Migration: A Study of Job Flow Changes in the San Diego Region

U.S. Census Local Employment Dynamics Partnership Workshop

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Agenda



Introduction



Objective



SANDAG Employment Centers



Methodology



Findings

About SANDAG

Metropolitan Planning Organization (MPO)

- Federal Designation: Transportation funding – Regional Plan

Regional Transportation Planning Agency

- State Designation: Transportation funding – Regional Plan

Council of Governments

- State Designation: Regional Housing Needs Assessment (RHNA)

Consolidated Agency

- State Law: Plan and build transportation projects

Regional Transportation Commission

- TransNet Program: Oversight and funding



San Diego Region Overview



3,290,423
total population



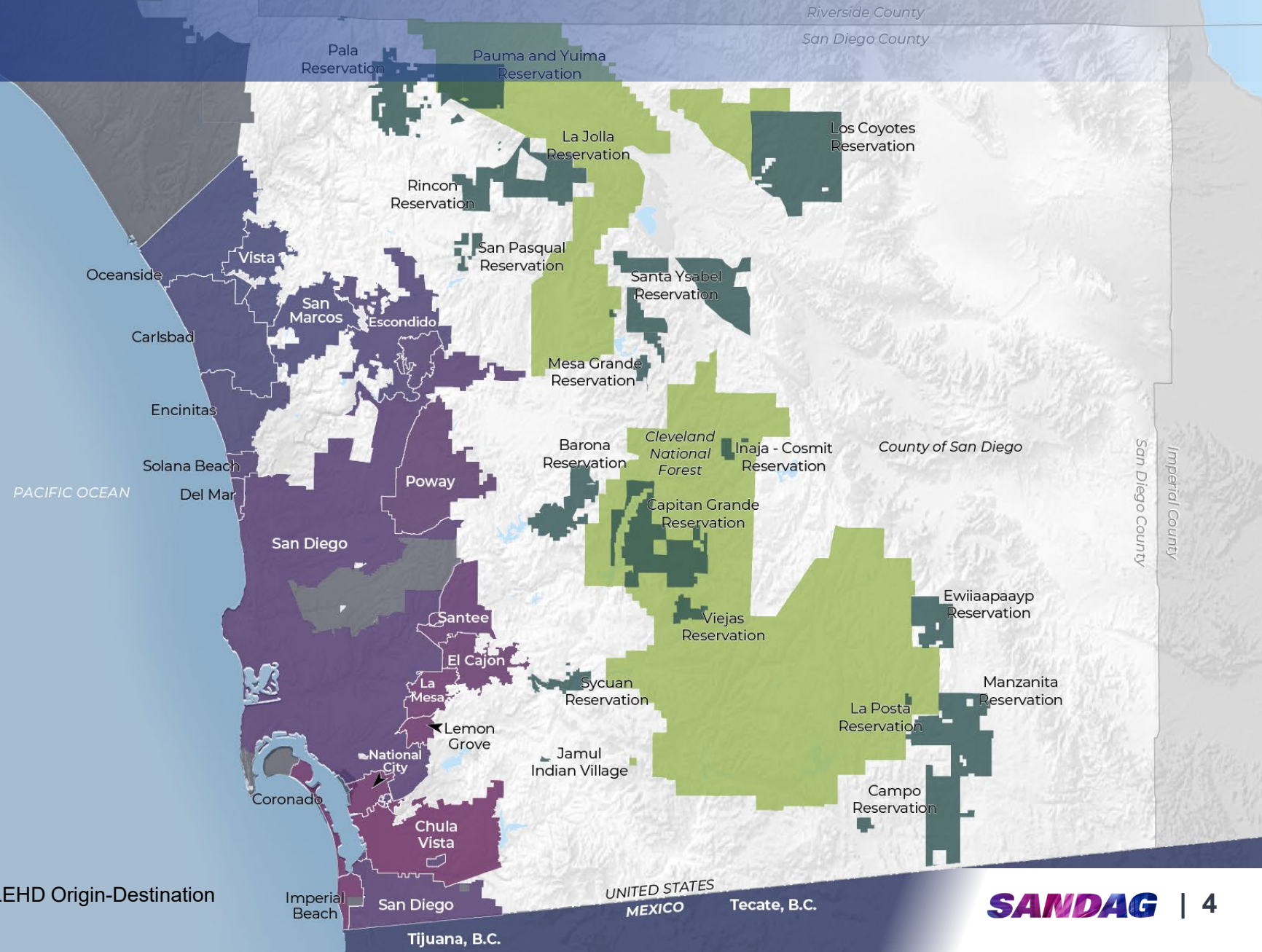
1,490,981
full-time and part-time jobs



1,244,496
housing units



\$98,241
median household income



Objective

How has employment changed in the San Diego Region from 2018 to 2022?

- We will answer this through the lens of Employment Centers (ECs)
- Analyze changes in high-density employment clusters and compare them to the overall region

Employment Centers 2.0

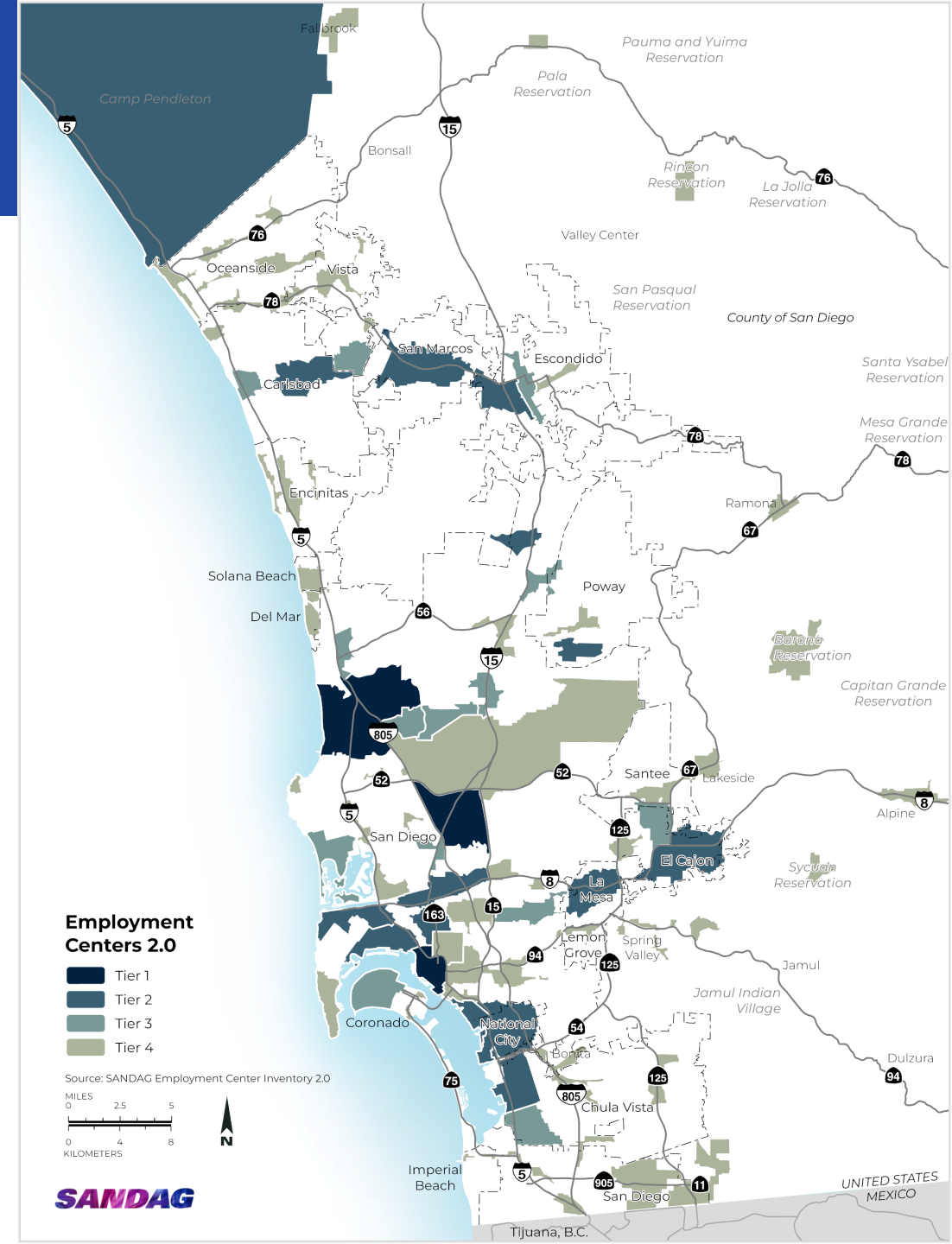
Employment Centers are areas with high densities of employment. There are **91 centers** in **four tiers**.

Tier	Count	# Employees	% of Region's Jobs
1	3	100K+	18.7%
2	15	25-100K	25.7%
3	14	15-25K	12.7%
4	59	2-15K	20.8%

[SANDAG Employment Centers 2.0](#)

[SANDAG infobits: Employment Centers in the San Diego Region 2.0](#)

[SANDAG Employment Centers Resources](#)



Methodology and Research Findings

Data Sources

- SANDAG Employment Centers 2.0 Boundaries
- LEHD Origin-Destination Employment Statistics (LODES) Version 8.0
 - Employment and residential areas
 - Census block level
 - 2018-2022 time period
 - Origin-Destination (OD)
 - Work Area Characteristics (WAC)
 - Job Types
 - JT03 – Private Primary Jobs



Analysis Process

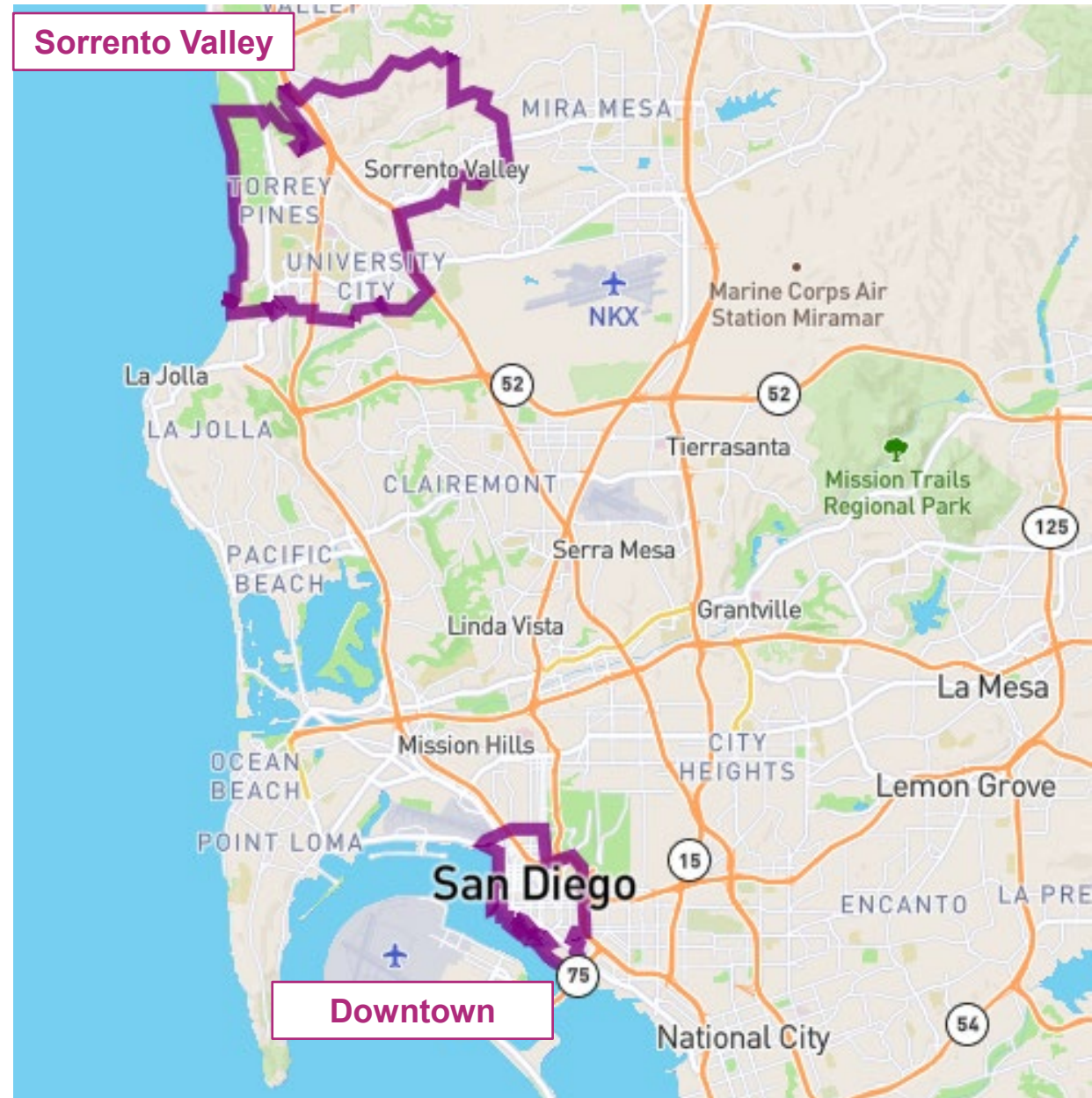
Select Employment Centers that have gone through major **job growth/loss**

To be consistent with EC methodology, we analyze **changes in primary characteristics** (Private Primary Jobs) for jobs and workers:

- Job growth/loss
- Industry Sector
- Job Earnings
- Worker Age
- Worker Origin

Selected Employment Centers

- LODES8 Work Area Characteristics (WAC) data in 2018-2022 timeframe
- Largest Increase in jobs – **Sorrento Valley**
- Largest Decrease in jobs – **Downtown**



Selected Employment Centers



Sorrento Valley



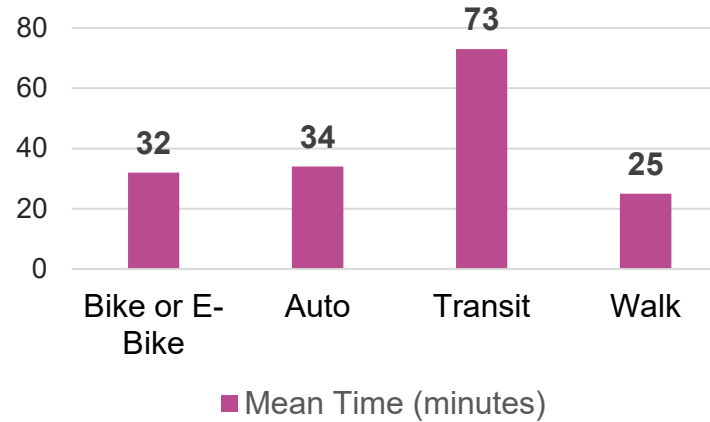
Downtown

Sorrento Valley Transportation Facts

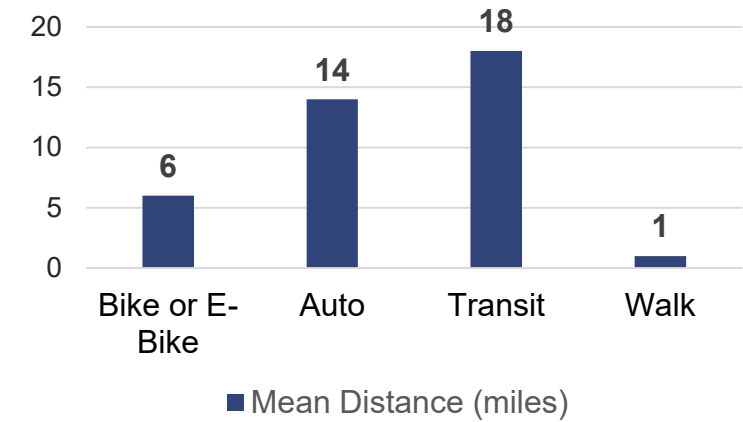


Sorrento Valley

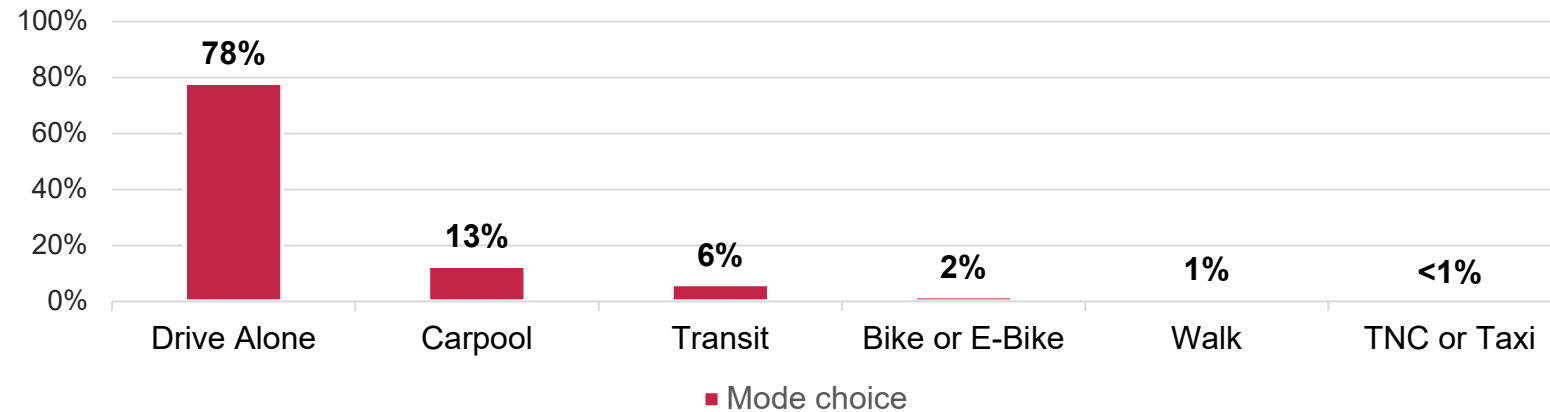
Average Travel Time During Peak Period



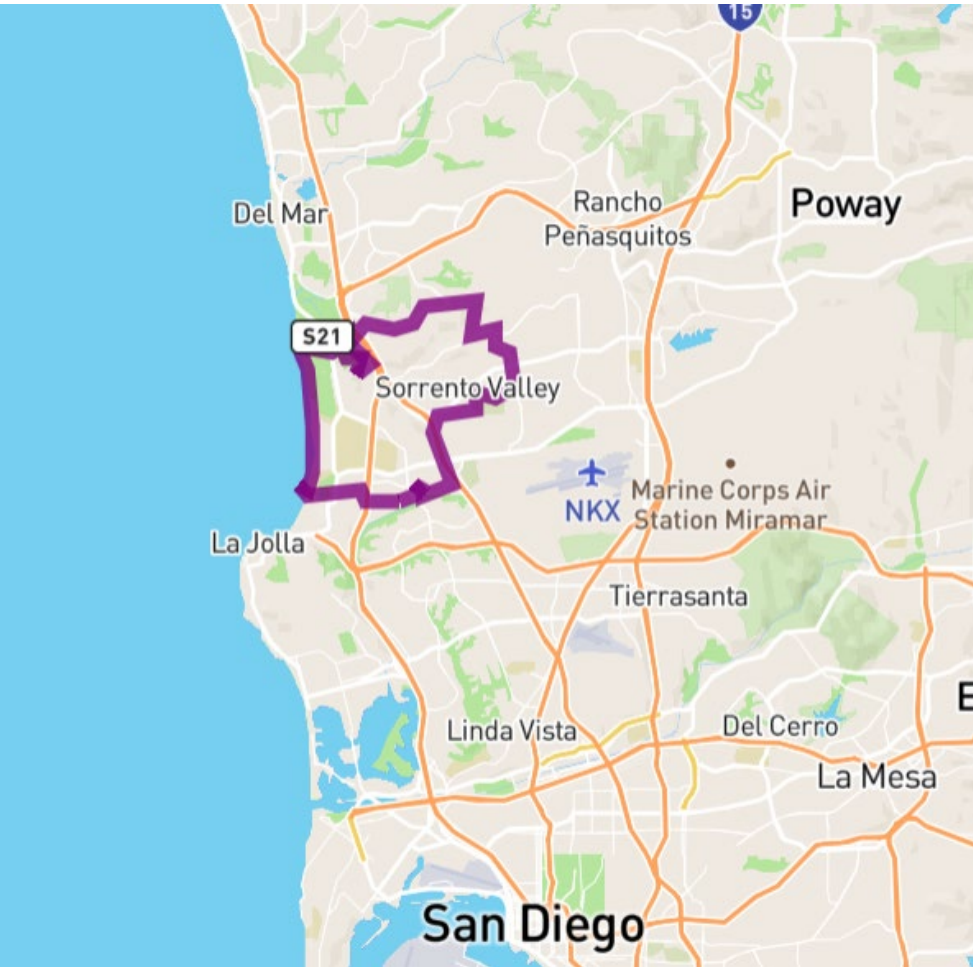
Average Travel Distance During Peak Period



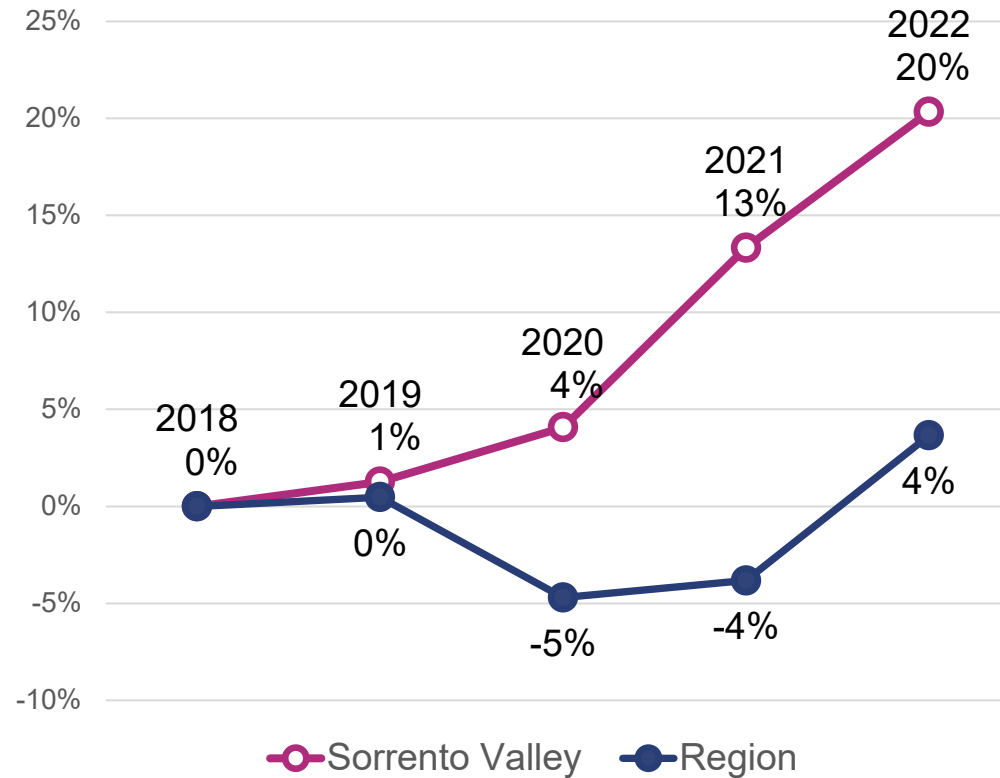
Mode of Transportation During Peak Period



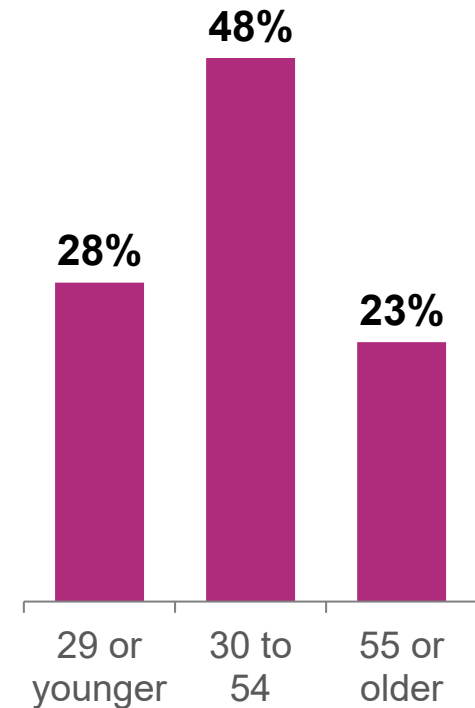
Sorrento Valley had Accelerated Job Growth Compared to the Region



Job gains in **Sorrento Valley** compared the **region**



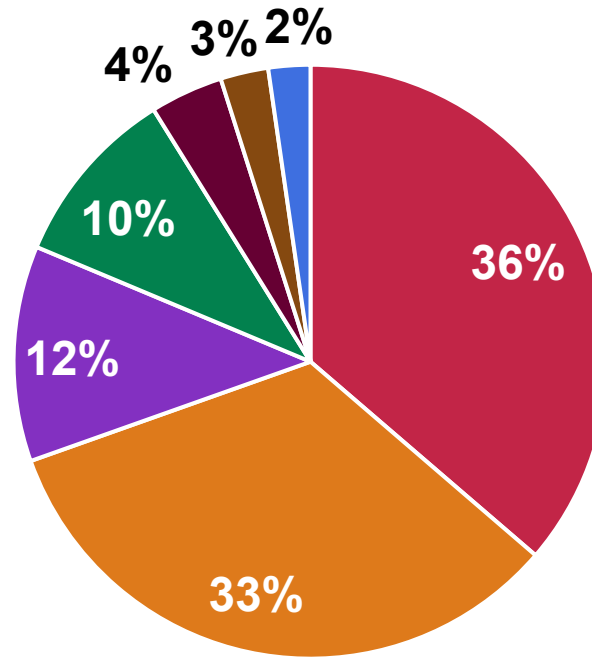
Sorrento Valley share of job gains by age, 2018 to 2022



Jobs Gained by Industry Sector

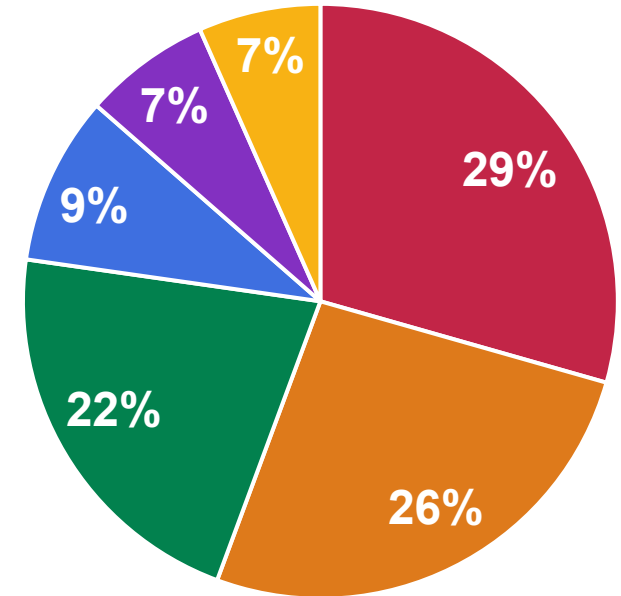
The majority of jobs gained in Sorrento Valley belonged to Tech, Administration, and Manufacturing sectors.

Sorrento Valley



- Professional, Scientific, and Technical Services
- Health Care and Social Assistance
- Manufacturing
- Information

Regional



- Administrative and Support and Waste Management
- Construction
- Transportation and Warehousing
- Wholesale Trade

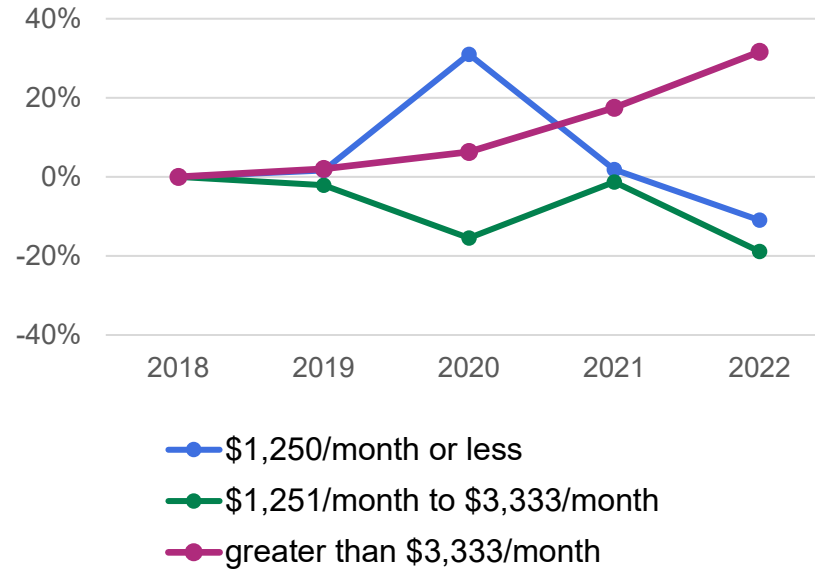
Note: Industry sectors with less than 2% increase not shown.

Earnings Over Time Compared to 2018

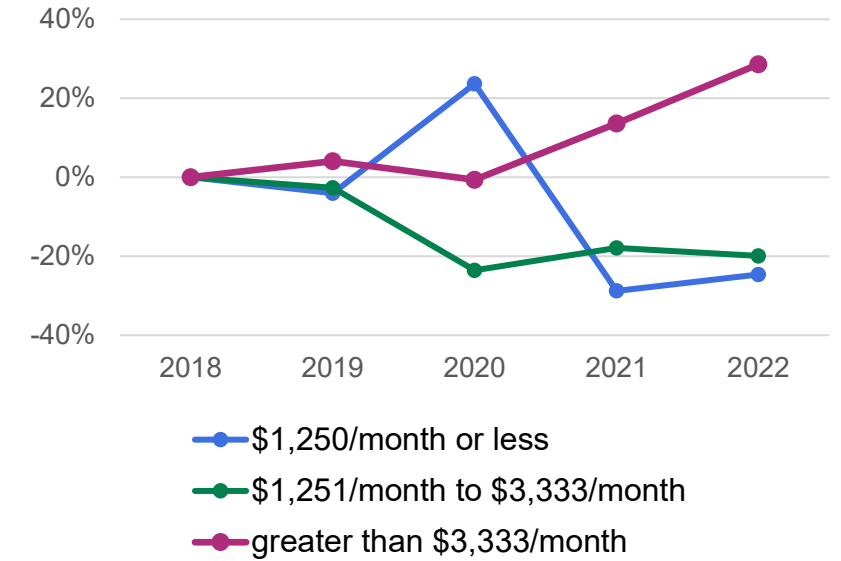
Sorrento Valley

- Only jobs earning more than \$3,333/month has had steady increase from 2018 to 2022.
- Jobs paying more than \$3,333/month account for more than 80% of jobs in 2022.

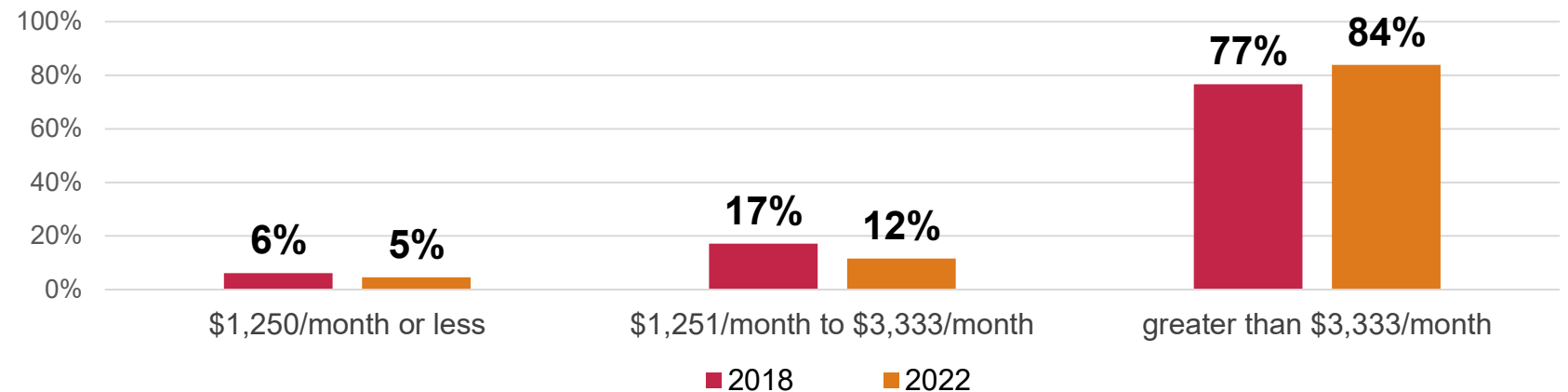
Sorrento Valley



Regional

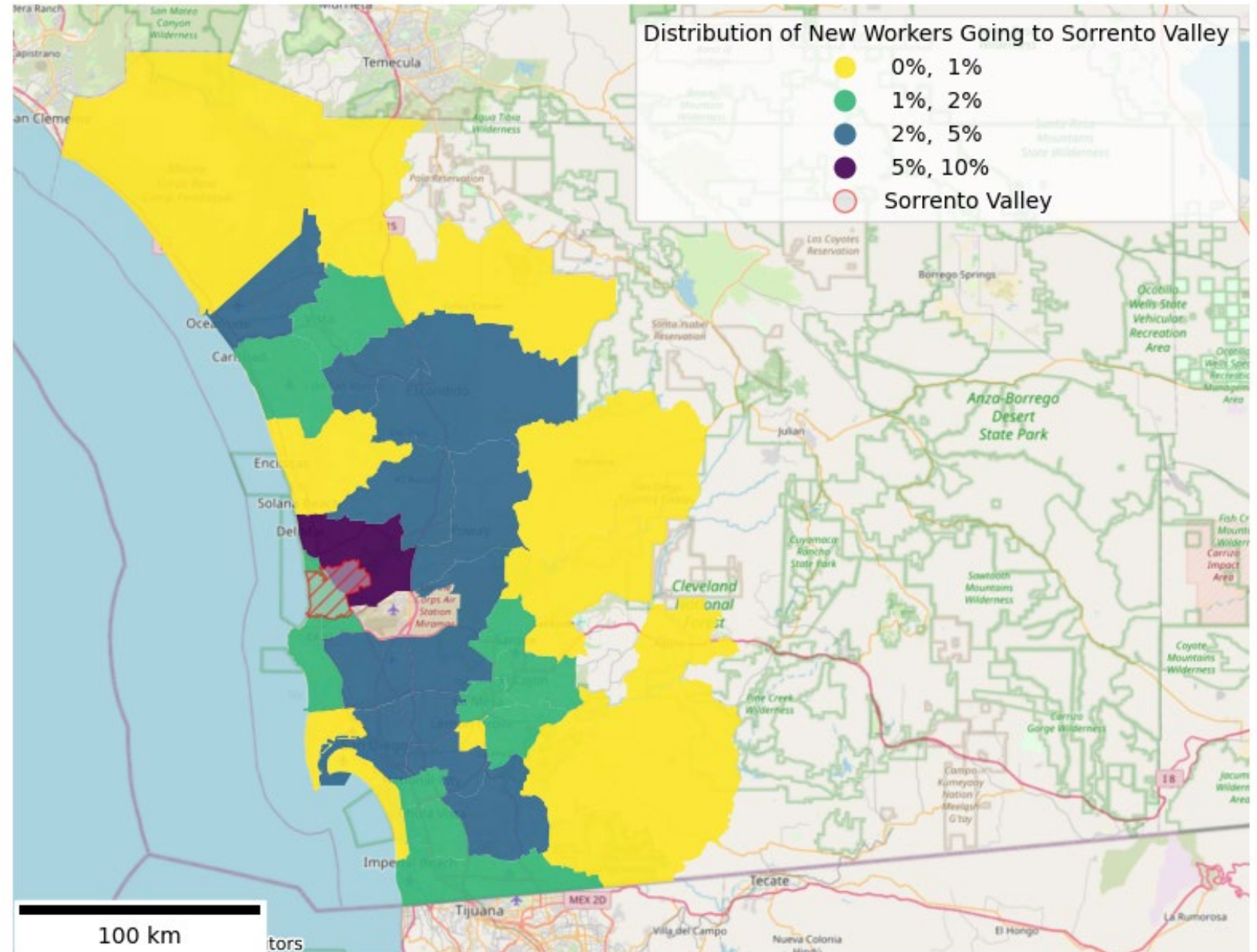


Percentage of Jobs by Earnings in Sorrento Valley, 2018 to 2022



Origin-Destination

- Largest portion (6%) of new workers in the SD region going to Sorrento Valley are located around the Del Mar-Mira Mesa area.
- The Del Mar-Mira Mesa area only contributed to 2% of new workers going to the region overall.
- Outside of San Diego, large portion of new workers also live in Los Angeles County.

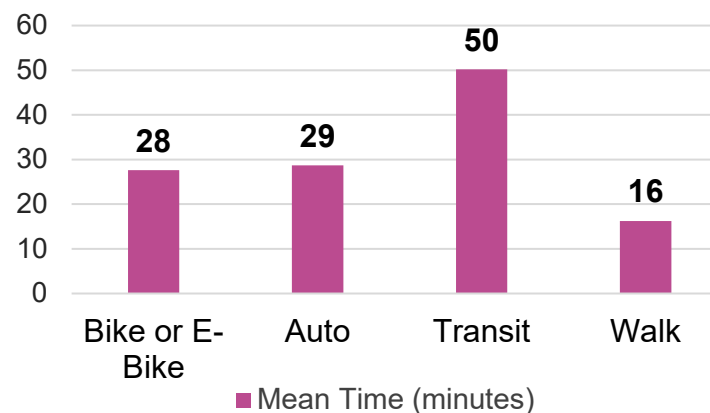


Downtown Transportation Facts

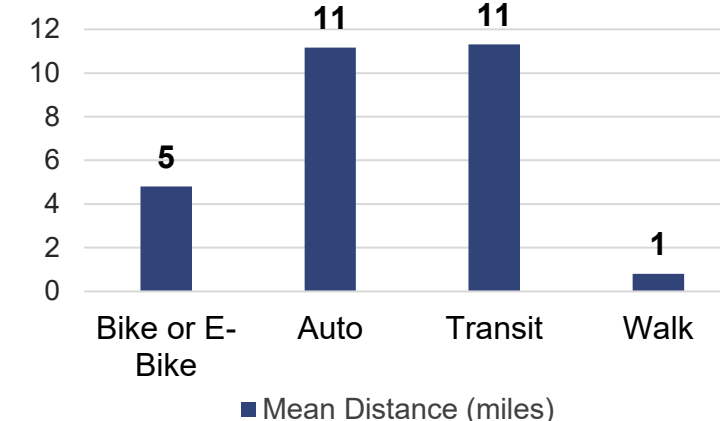


Downtown

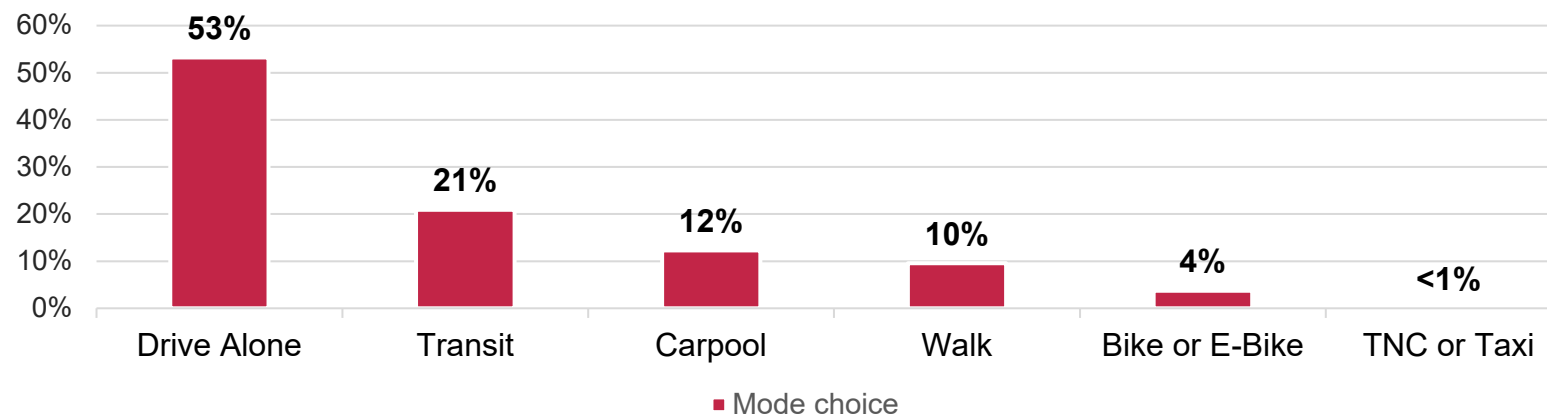
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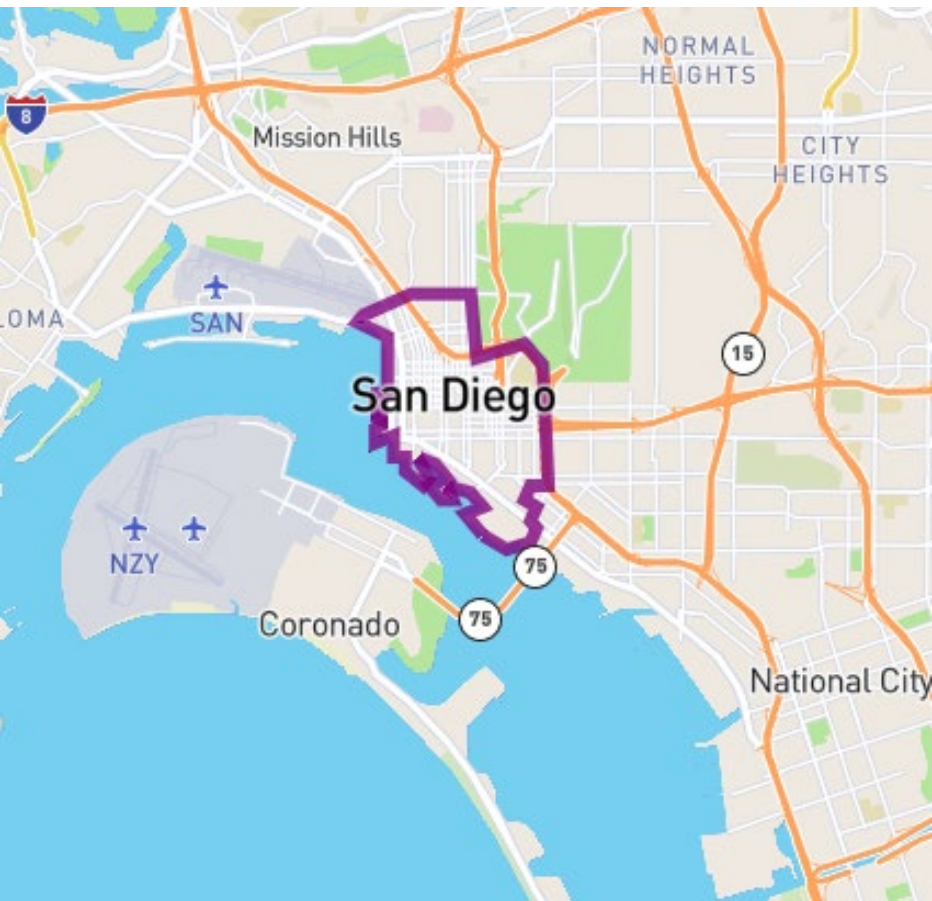
Average Travel Distance During Peak Period



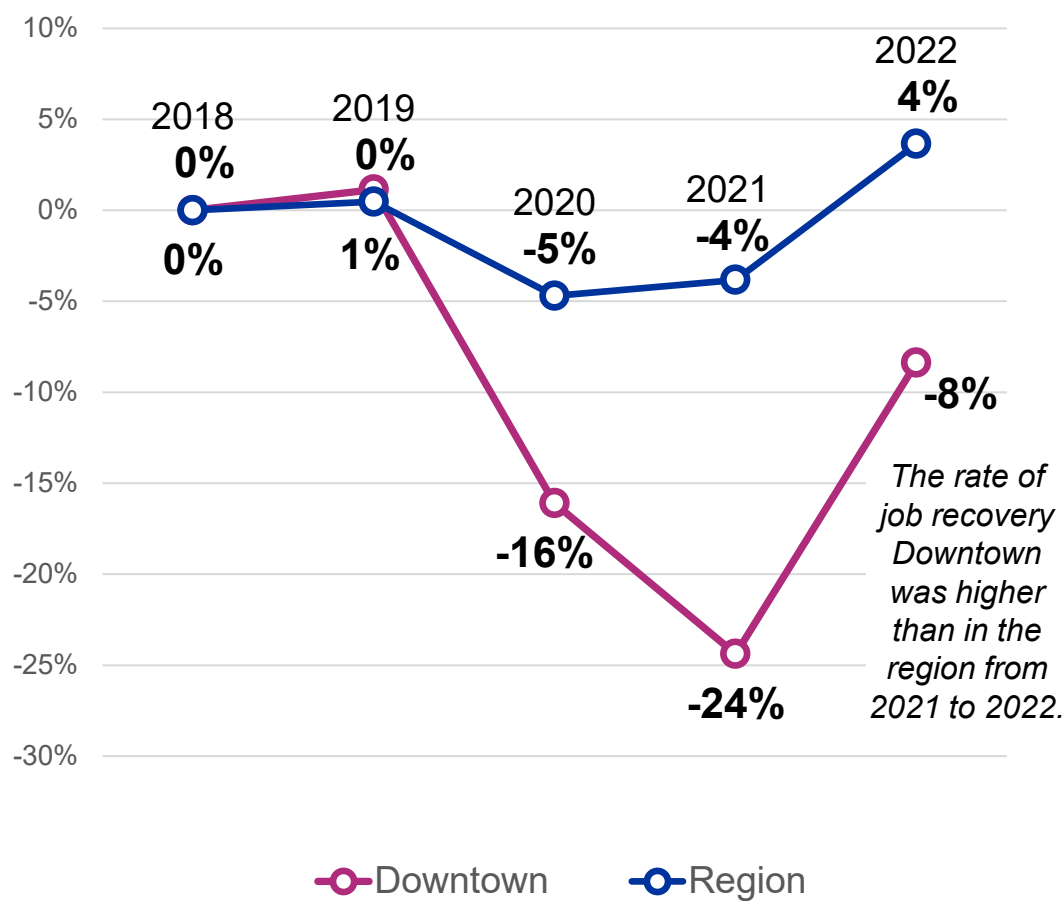
Mode of Transportation During Peak Period



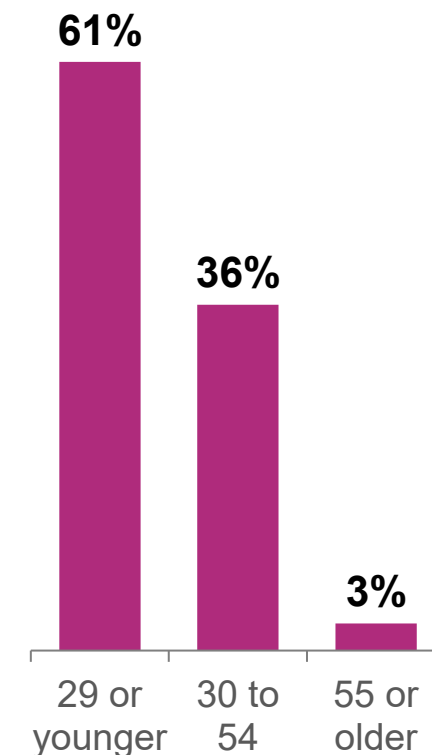
Downtown Jobs Recovered Faster Compared to the Region



Job losses in **Downtown** compared to the **region**



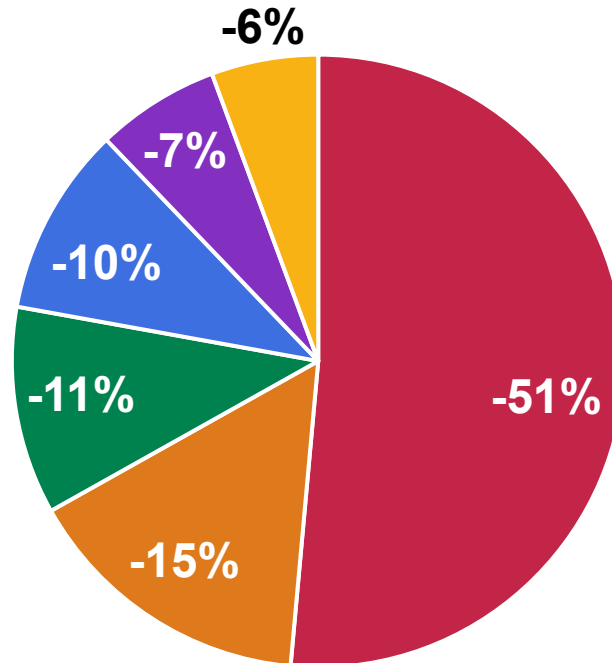
Downtown share of job losses by age, 2018 to 2022



Job Losses by Industry Sector

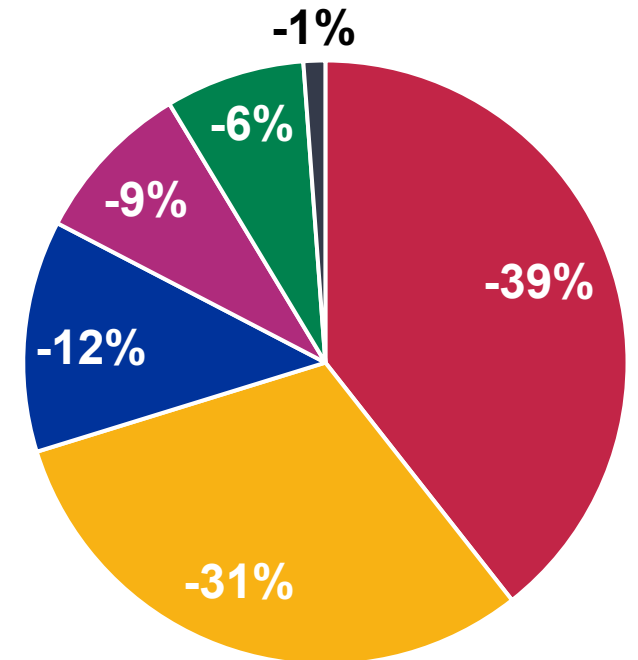
- Accommodation and Food Services had the majority of job losses in Downtown, **51% overall**

Downtown



- Accommodation and Food Services
- Retail Trade
- Educational Services
- Manufacturing
- Wholesale Trade

Regional

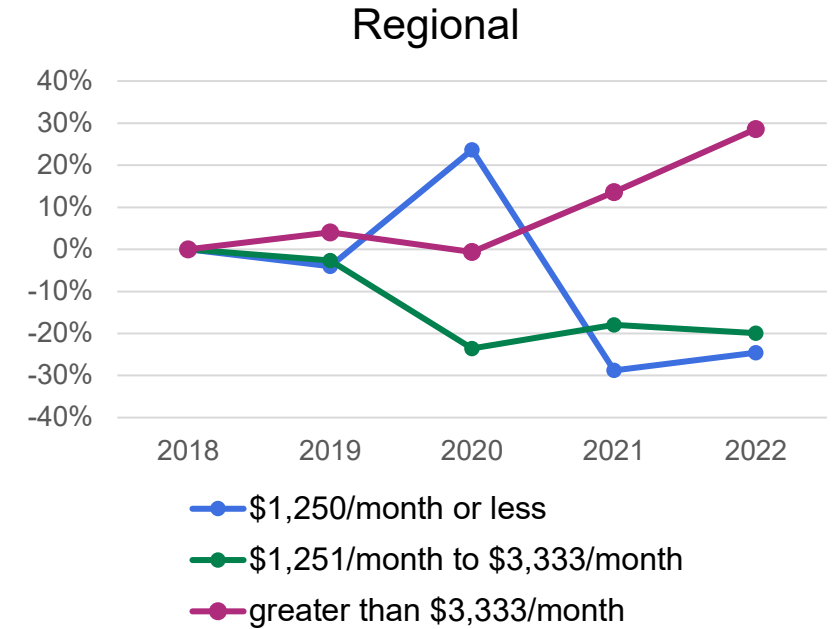
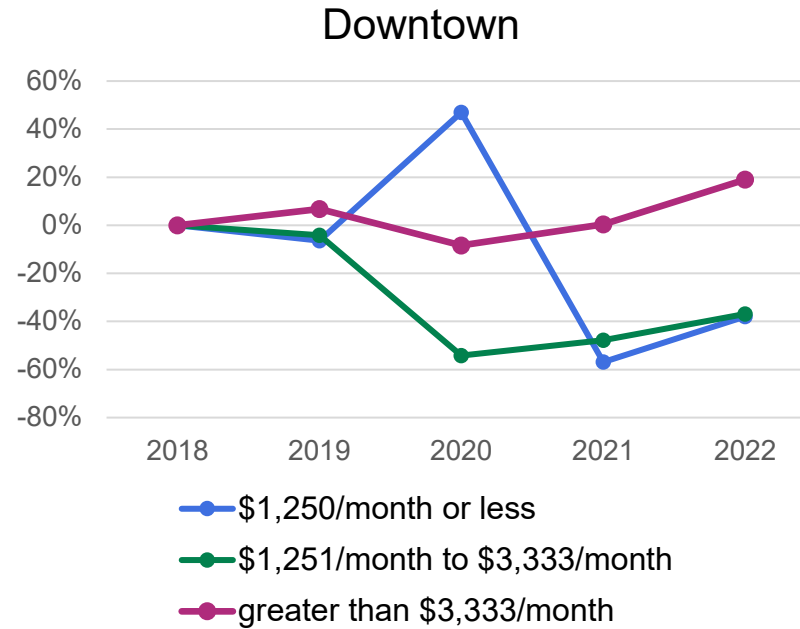


- Administrative and Support and Waste Management
- Arts, Entertainment, and Recreation
- Other Services [except Public Administration]
- Transportation and Warehousing

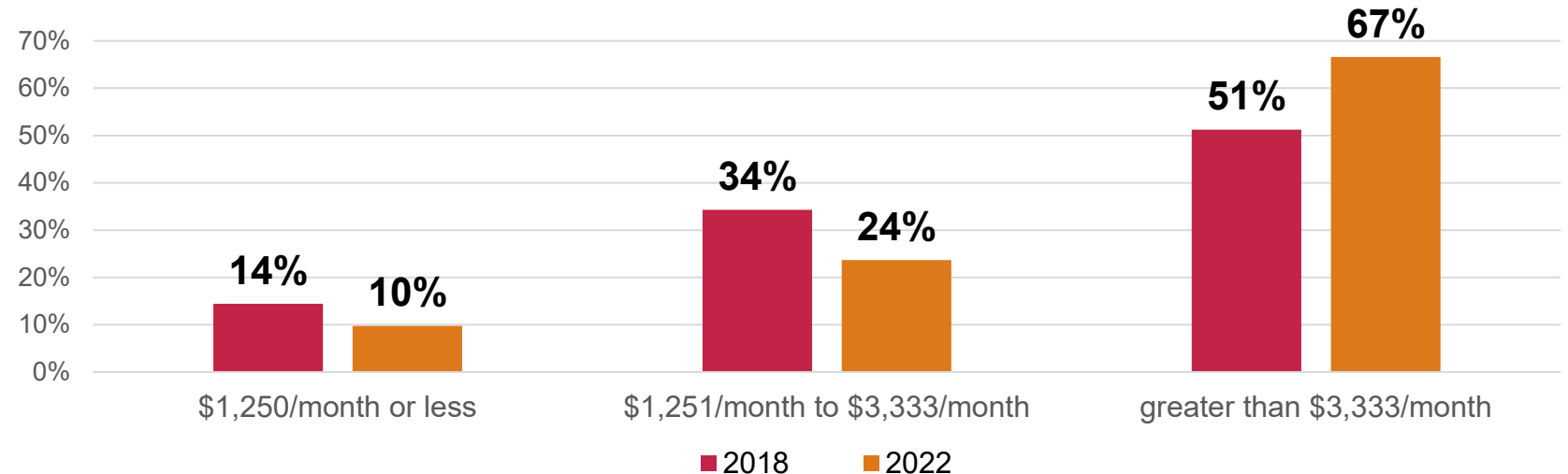
Earnings Over Time Compared to 2018

Downtown

- Jobs paying more than \$3,333/month had the largest gain, **19%** from 2018 to 2022.
- Jobs earning \$1,250/month or less had the largest loss, **-37.9%** from 2018 to 2022.

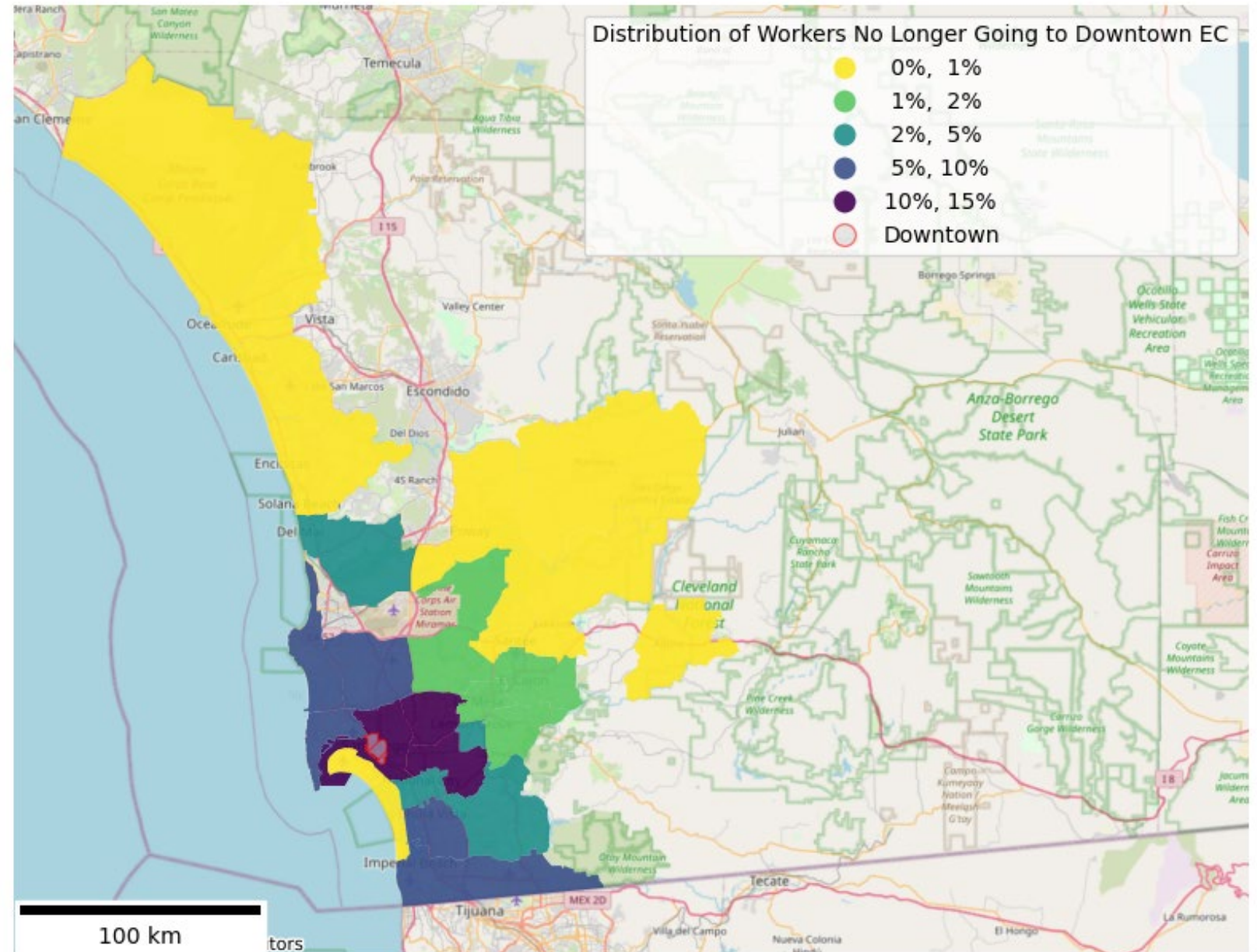


Percentage of Jobs by Earnings in Downtown, 2018 to 2022



Origin-Destination

- Loss in workers going to Downtown concentrated around central San Diego.
- Similarly, the loss of workers in the region is located around central San Diego and along the coast.



Findings

Overall

- Sorrento Valley leads the region with large gains in employment
- Downtown followed regional trends with a dip during COVID but faster recovery

Age

- Downtown followed regional trends with a drop in jobs for younger people

Industry Sector

- Both selected ECs had gains in Technology and Administration jobs
- Downtown followed regional trends with a drop in Accommodations and Food Service jobs.

Findings – Cont'd

Earnings

- Rise of jobs that pay more than \$3,333/month
- Drop of jobs in both other brackets, especially \$1,250/month or less.

Worker Origin

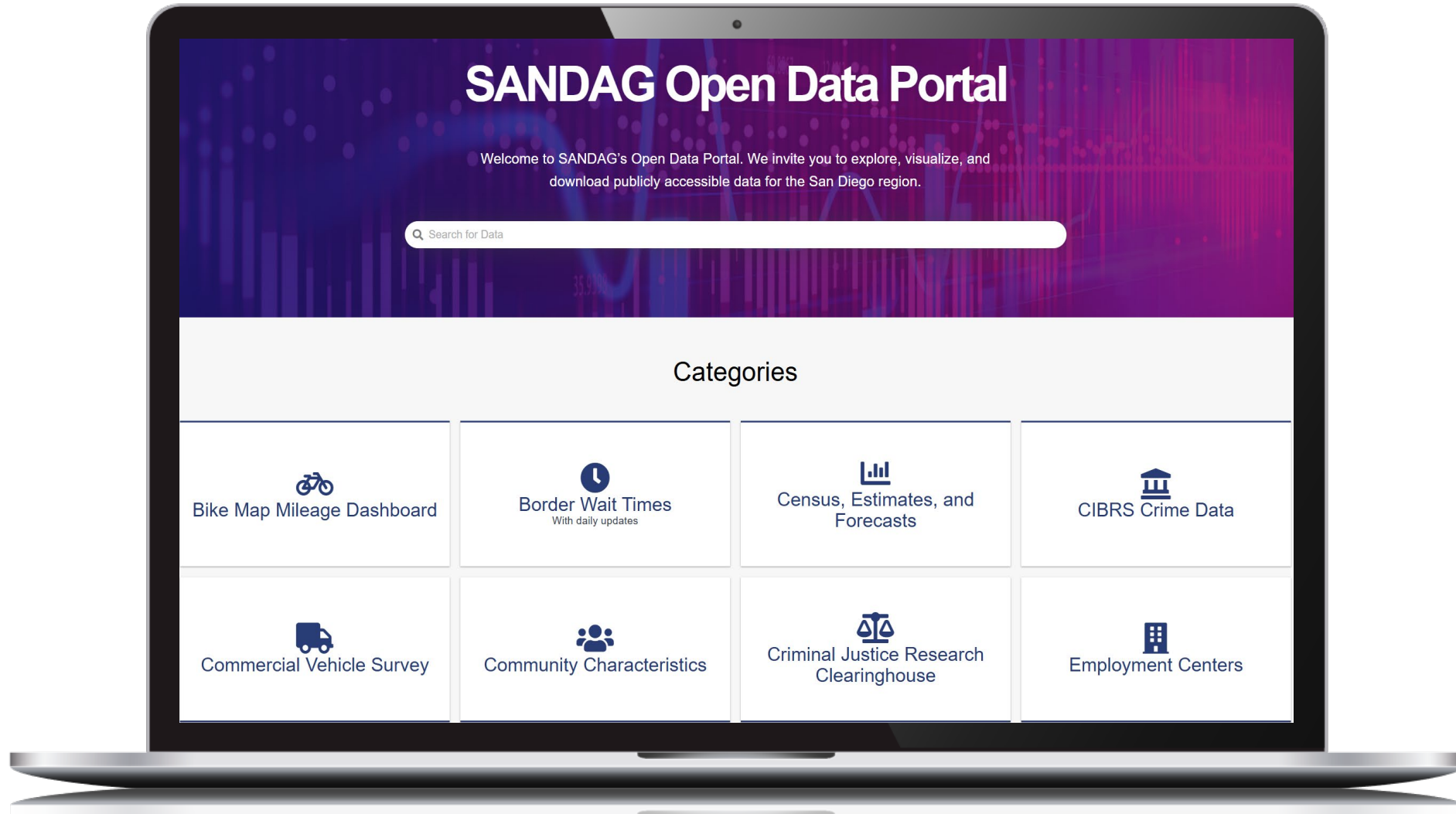
- Sorrento Valley had new workers living across the region
- Downtown had lost workers living around central San Diego

Next Steps

- Enhance SANDAG data products
- Inform transportation planning strategies
- Promote sustainable transportation
- Serve our diverse communities with options

Resources on Data, Research, and Products

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