

Poway, California

Indicators Report

by
The National Economic Education Delegation (NEED)

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Exploring the economics, demographics, and well-being of Poway and its residents through indicators.

This report was produced by the:

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Executive Summary

Assessing the City with Indicators

About this Report

This report provides background or summary information for the city of Poway (the City) in the form of indicators.

Using this Report

Indicators are measures of various aspects of a regional economy. They help to provide an indication of the quality of life in a region and progress toward improving conditions in the local economy. This report focuses on indicators

for changing demographics, incomes, housing markets, commute patterns, and employment in Poway. These indicators are compared to San Diego County (the County) as a whole, a broader region where one is well defined, California, and the United States.

This report is vital for understanding trends in the underlying economy. It does not provide forecasts, but Rob Eyler and Jon Haveman at Economic Forensics and Analytics are available to provide them if that is of interest.

Topics Covered:

- **Demographics:** A detailed snapshot of Poway demographics is presented. This provides evidence on the size, age and sex, income and poverty status, race and ethnicity, housing status, living arrangements, education, health, and transportation choices of the population. Beyond the current population level, data on trends in local population growth, in comparison with other broader regions is presented, in both tabular and graphical form.
- **Employment Report:** Here, we provide a brief snapshot of employment and unemployment in Poway and how the City's experience differs from broader regions.
- **Income and Earnings:** Vital to understanding the prosperity of a city relative to its surrounding area is information on income and earnings. We provide a ranking of the City's income relative to all cities in California as well as growth relative to local regions. Inequality and poverty status are also important indicators for the level of equity in the community. We provide evidence of trends in both, not only for all residents, but also for children separately.
- **Housing:** This section provides evidence on the cost and availability of housing. Both median home values and rental costs are included, along with detailed information on home ownership, by age and income, in particular. Further, evidence is provided on the housing burden in the City, again, in comparison with other broader regions. We also provide evidence on the rate at which new buildings and units are permitted along with a broader housing picture. Finally, we provide evidence on the age of the housing stock in Poway, along with information on how long the City's residents have been in place.
- **Transportation:** Increasingly important, in the wake of the pandemic, is an understanding of the transportation patterns and choices of local residents. We provide detailed evidence on the proportion of residents who work from home and on the various transportation choices of those who head to the office. This information is also provided for those who work in Poway, but do not necessarily live in Poway.
- **Migration:** Population changes comes primarily through organic causes: births and deaths. Migration between regions also plays a significant role in population growth. A final section of the report provides evidence on migration into and out of the City.

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Demographics

Definition:

Data on the demographics of a city indicate the nature of the population, with a focus on age, gender, race and ethnicity, as well as household composition.

Why is it important?

The characteristics and growth of Poway's population are fundamental indicators of the city's growth potential.

A Demographic Snapshot

Statistic	2022	2019
POPULATION		
Population Estimate (#, 5yr)	48,737.0	49,701.0
Veterans (#, 5yr)	3,471.0	3,993.0
Foreign born persons (% , 5yr)	19.6	20.0
Population age 25+ (#, 5yr)	34,599.0	34,329.0
AGE AND SEX		
Persons under 5 years (% , 5yr)	5.8	5.9
Persons under 18 years (% , 5yr)	22.2	23.7
Persons 65 years and over (% , 5yr)	19.2	16.9
Female persons (% , 5yr)	48.8	51.2
INCOME AND POVERTY		
Median household income (\$, 5yr)	135,605.0	107,902.0
Per capita income in past 12 months (\$, 5yr)	58,325.0	45,689.0
Persons in poverty (% , 5yr)	5.9	6.0
Children age less than 18 in poverty (#, 5yr)	823.0	745.0
Children age less than 18 in poverty (% , 5yr)	7.7	6.4
RACE AND ETHNICITY		
White alone (% , 5yr)	62.7	74.1
African American alone (% , 5yr)	2.9	1.6
American Indian or Alaska Native alone (% , 5yr)	0.5	0.9
Asian alone (% , 5yr)	13.4	11.6
Native Hawaiian and Other Pacific Islander alone (% , 5yr)	0.6	0.1
Two or More Races (% , 5yr)	11.5	5.6
Hispanic or Latino (% , 5yr)	16.6	17.4
White alone, not Hispanic or Latino (% , 5yr)	59.4	64.6
HOUSING		
Housing units (#, 5yr)	16,757.0	16,595.0
Owner-occupied housing units (% , 5yr)	75.4	74.3
Median value of owner-occupied housing units (\$, 5yr)	911,500.0	686,400.0
Median selected monthly owner costs-with a mortgage (\$, 5yr)	3,339.0	2,903.0
Median selected monthly owner costs-without a mortgage (\$, 5yr)	903.0	725.0
Median gross rent (\$, 5yr)	2,165.0	1,627.0
FAMILIES AND LIVING ARRANGEMENTS		
Households (#, 5yr)	16,159.0	15,946.0
Persons per household (#, 5yr)	3.0	3.1
Living in same house 1 year ago, % of persons age 1+ (5yr)	89.8	86.5
EDUCATION		
High school graduate or higher, % of persons age 25+ (5yr)	92.5	91.3
Bachelor's degree or higher, % of persons age 25+ (5yr)	53.5	48.2
HEALTH		
With a disability, under age 65 years (#, 5yr)	2,161.0	2,571.0
Persons without health insurance, under age 65 years (% , 5yr)	3.7	3.7
LABOR FORCE		
In civilian labor force, persons age 16+ (% , 5yr)	63.3	62.7
In civilian labor force, women age 16+ (% , 5yr)	56.1	56.5
Employed, persons age 16+ (% , 5yr)	56.9	56.8
Self employed (% , 5yr)	12.0	13.1
TRANSPORTATION		
Mean travel time to work, workers age 16+ (Mins., 5yr)	21.5	24.9
Drive alone in private vehicle (% , 5yr)	71.2	80.5
Using public transportation (% , 5yr)	1.3	1.8
Worked from home (% , 5yr)	18.0	7.4

Source: American Community Survey, Summary Files

Note: Data are from the 1-year files unless indicated by the notation 5yr.

Current Population

The data in these two tables and the following two graphs are from the CA Department of Finance (DOF). The DOF produces population estimates for geographies around California twice a year: January and July. As estimates for cities are only available in January, these two tables are based on the January data. The remaining figures are from the American Community Survey (ACS), provided annually by the U.S. Bureau of the Census.

Table 1. Population Change by Region
(Thousands, January to January)

Region	2023 Population	% Change		
		1 Year	3 Year	5 Year
City				
Poway	48,483	-0.04	-1.25	-3.44
County and Broader Regions				
San Diego County	3,269,755	-0.17	-1.85	-1.90
Southern California	21,794,548	-0.41	-2.24	-2.84
California	38,940,231	-0.35	-1.79	-2.01

Source: CA DOF; Calculations by National Economic Education Delegation

Table 2. County Population Change by City
(Thousands, January to January)

City	2022	2023	% Change		
			Local	Southern California	California
San Diego County	3,275.4	3,269.8	-0.17	-0.41	-0.35
San Diego	1,372.8	1,368.4	-0.32		
Chula Vista	274.1	274.8	0.26		
Oceanside	171.8	171.1	-0.41		
Escondido	150.1	149.8	-0.17		
Carlsbad	114.9	114.5	-0.28		
El Cajon	105.3	104.6	-0.61		
Vista	100.0	99.8	-0.14		
San Marcos	93.8	94.5	0.75		
Encinitas	61.3	61.1	-0.32		
National City	61.3	61.0	-0.54		
La Mesa	60.2	60.4	0.30		
Santee	58.7	59.2	0.88		
Poway	48.5	48.5	-0.04		
Lemon Grove	27.1	27.4	1.22		
Imperial Beach	26.0	25.9	-0.43		
Coronado	22.0	22.1	0.65		
Solana Beach	12.8	12.8	0.05		
Del Mar	3.9	3.9	0.00		

Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)

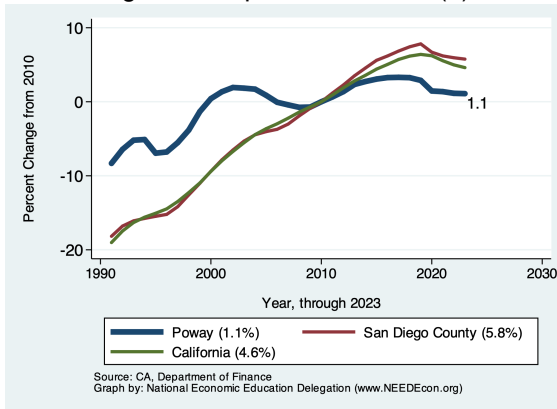


Figure 2: Population Growth (2)

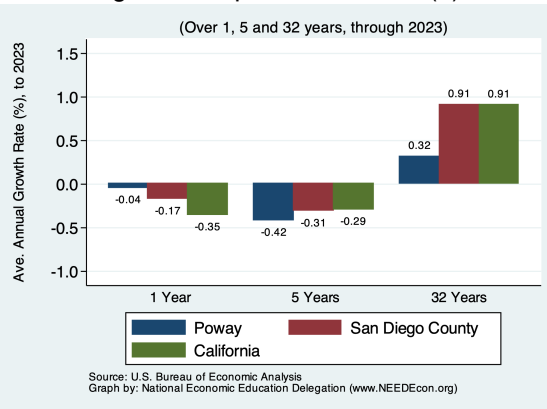


Figure 3: Population by Age - Detailed Age Categories

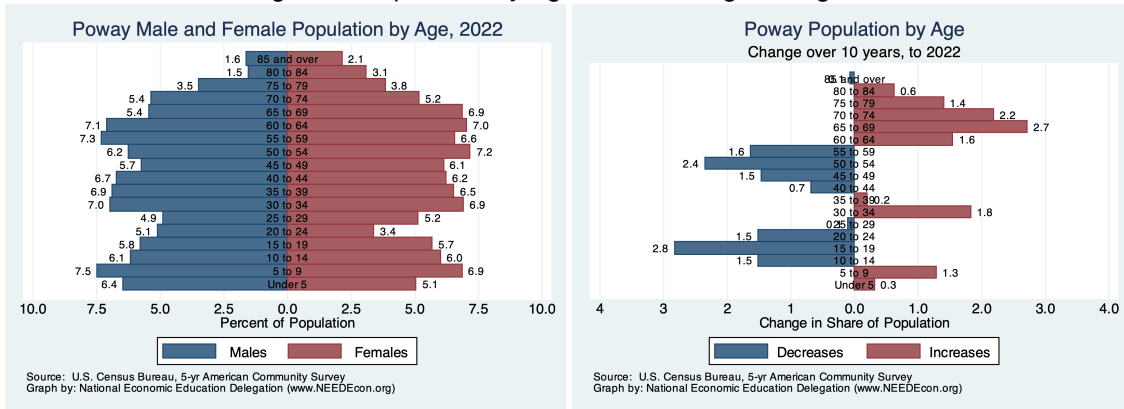


Figure 4: Population by Age - Broad Age Categories

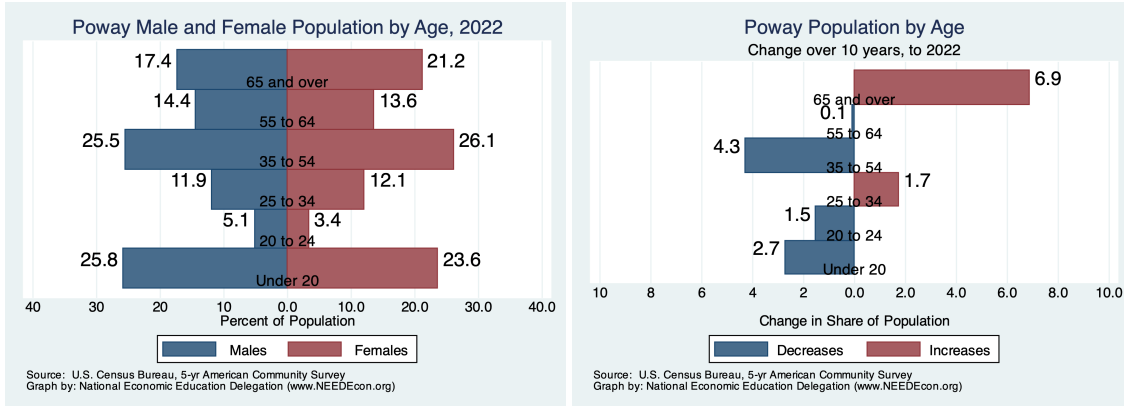


Figure 5: Population by Educational Attainment

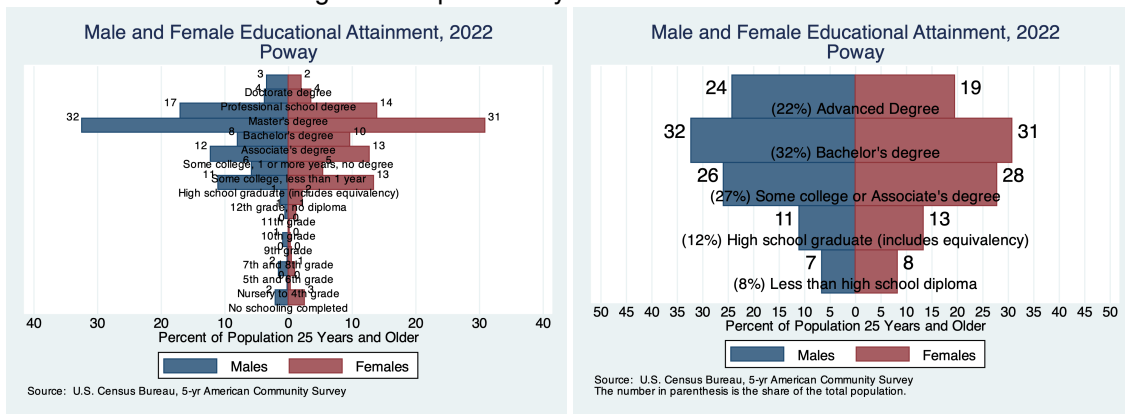


Figure 6: Population by Race/Ethnicity

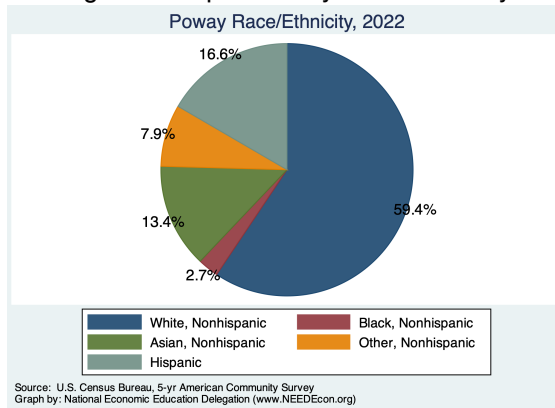
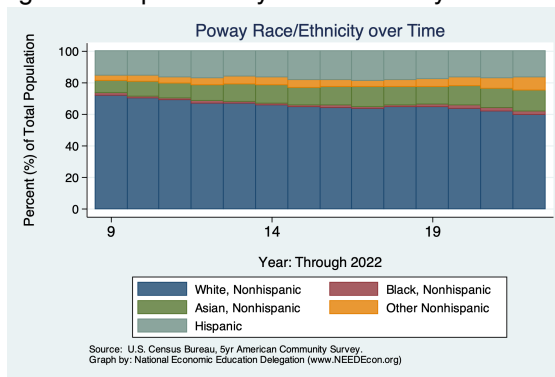


Figure 7: Population by Race/Ethnicity Over Time



Employment Report

Citywide Employment and Unemployment

Definition:

Each month, California's Employment Development Division (EDD) publishes an update on employment in California and in MSAs, counties, and cities all across the state. The report focuses primarily on non-farm employment, providing estimates of changes in em-

ployment by industry as well as unemployment in each region. Data for cities is limited to aggregate employment, labor force, and unemployment data. Those are reported below.

Why is it important?

Employment growth is a fundamental indicator of the health of an economy.

Table 3. Poway Summary for March, 2024

Category	Current Value	Change From:		
		Last Month	2 Months Ago	Last Year
Employment	8,924	-30	-53	-103
Labor Force	9,644	9	15	96
Number Unemployed	678	-4	21	97
Unemployment Rate	7.0	-0.0	0.2	0.9

Source: EDD, National Economic Education Delegation

Figure 8: Historical Employment and Unemployment - Last 12 Months

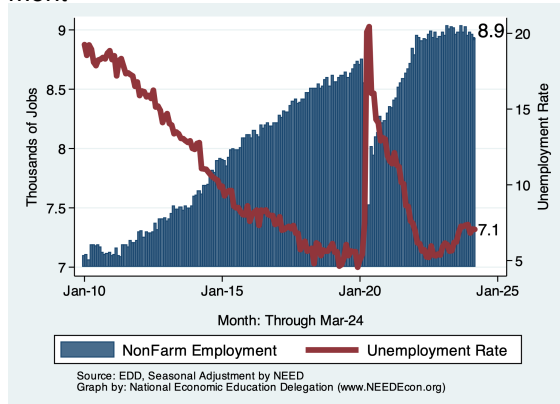


Figure 9: Employment and Unemployment - Last 12 Months

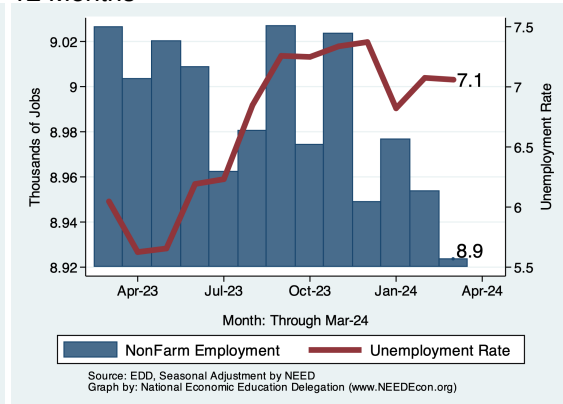


Figure 10: Relative Employment Growth Across Regions - since 2010

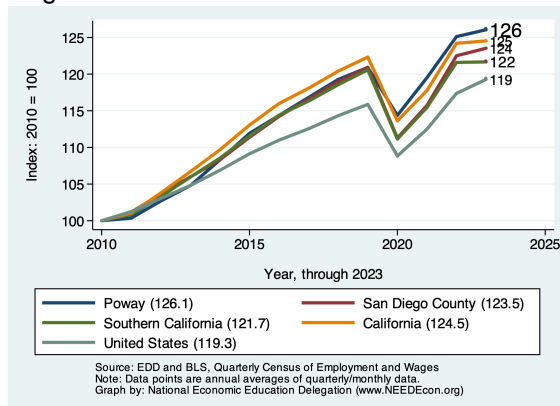
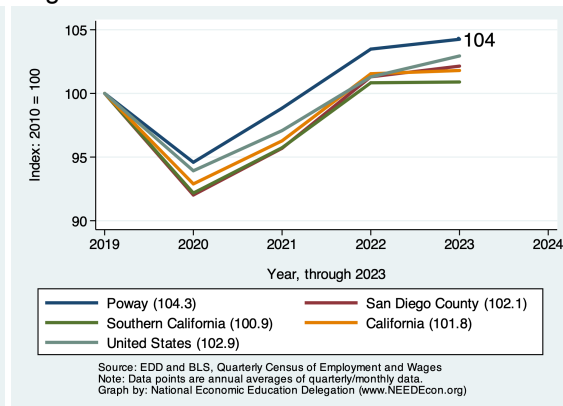


Figure 11: Relative Employment Growth Across Regions - since 2019



County Employment by Industry

California's Employment Development Division (EDD) does not regularly produce data on employment by industry for cities. However, we are able to report industry-level employment data for San Diego County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in San Diego County for March, 2024

Industry	Employment	Share	Empl Growth	% Growth - Annualized Rate					
				Month	Qtr	6mo	1yr	3yr	5yr
Total Nonfarm	1,562,672	100.0	1,044.9	0.8	0.9	1.2	0.9	3.8	0.9
Total Private	1,307,241	83.7	578.9	0.5	0.5	1.1	0.6	3.9	1.0
Goods Producing	204,267	13.1	1,175.9	7.2	-2.9	-1.1	-0.1	1.3	0.7
Mining, Logging and Construction	91,648	5.9	1,376.4	19.9	0.5	1.4	3.2	3.5	1.9
Mining and Logging	400	0.0	0.0	0.0	0.0	0.0	33.3	11.1	6.7
Construction	91,237	5.8	1,280.2	18.5	0.4	1.5	3.0	3.5	1.8
Manufacturing	112,600	7.2	-248.4	-2.6	-5.1	-3.3	-2.7	-0.4	-0.3
Durable Goods	82,107	5.3	-140.2	-2.0	-5.7	-3.7	-2.6	-0.9	-0.7
Non-Durable Goods	30,572	2.0	-20.8	-0.8	-3.1	-1.5	-2.9	1.1	1.1
Service Providing	1,358,608	86.9	598.0	0.5	1.7	1.5	1.1	4.2	0.9
Trade, Trans & Utilities	222,862	14.3	734.9	4.0	-0.3	-0.1	-0.1	1.1	-0.1
Wholesale Trade	42,238	2.7	45.1	1.3	-4.8	-3.8	-3.1	0.7	-0.9
Retail Trade	139,705	8.9	392.1	3.4	0.8	0.9	0.6	0.4	-0.9
Trans & Warehousing	34,755	2.2	140.0	5.0	-0.2	-1.6	0.1	3.6	3.9
Utilities	6,113	0.4	26.9	5.4	0.7	3.3	5.2	8.2	6.6
Information	21,190	1.4	186.3	11.2	-1.9	-4.6	-4.5	-0.6	-2.0
Financial Activities	71,664	4.6	-13.6	-0.2	-1.4	-0.7	-2.6	-1.7	-1.1
Finance & Insurance	41,316	2.6	8.0	0.2	-2.8	-2.4	-4.4	-3.9	-2.0
Real Estate & Rental & Leasing	30,356	1.9	47.6	1.9	2.1	1.9	-0.1	2.2	0.4
Professional & Business Svcs	269,563	17.3	-1,232.7	-5.3	-2.3	-1.9	-3.8	1.3	1.3
Prof, Sci, & Tech	153,258	9.8	-819.0	-6.2	-3.9	-2.7	-4.2	1.3	1.3
Admin & Support Svcs	90,260	5.8	-413.4	-5.3	0.3	0.7	-3.4	2.7	2.4
Employment Svcs	35,707	2.3	44.4	1.5	1.7	-2.6	-8.4	1.8	4.9
Educational & Health Svcs	253,835	16.2	1,047.7	5.1	7.1	6.0	6.5	6.1	3.6
Education Svcs	30,035	1.9	69.4	2.8	1.5	5.1	5.2	6.5	0.2
Health Care & Social Assistance	223,627	14.3	936.5	5.2	8.0	5.9	6.7	6.1	4.2
Leisure & Hospitality	205,387	13.1	-186.7	-1.1	0.3	2.6	2.8	14.9	0.4
Arts, Entertainment & Recreation	32,811	2.1	8.9	0.3	5.7	13.0	9.4	26.7	1.4
Accommodation & Food Svcs	173,029	11.1	-278.3	-1.9	0.1	1.5	1.5	13.2	0.2
Other Svcs	58,049	3.7	19.8	0.4	2.2	0.4	2.5	10.2	0.7
Government	255,691	16.4	522.3	2.5	3.6	2.8	2.5	3.2	0.4
Federal	47,317	3.0	136.1	3.5	2.2	2.4	-0.0	-0.4	-0.1
State	59,492	3.8	116.8	2.4	2.8	2.3	4.3	7.3	3.0
Local	149,100	9.5	276.0	2.2	5.6	3.3	2.6	3.0	-0.2
County	21,763	1.4	154.6	8.9	12.9	7.4	6.8	1.3	1.7
City	19,757	1.3	75.0	4.7	0.2	2.3	1.6	1.6	0.6
Local Government Education	79,213	5.1	144.5	2.2	2.1	0.9	1.8	4.6	-0.4

Source: EDD, National Economic Education Delegation (NEED)

Some Employee Detail

Employed in Poway

Figure 12: Employment by Occupation

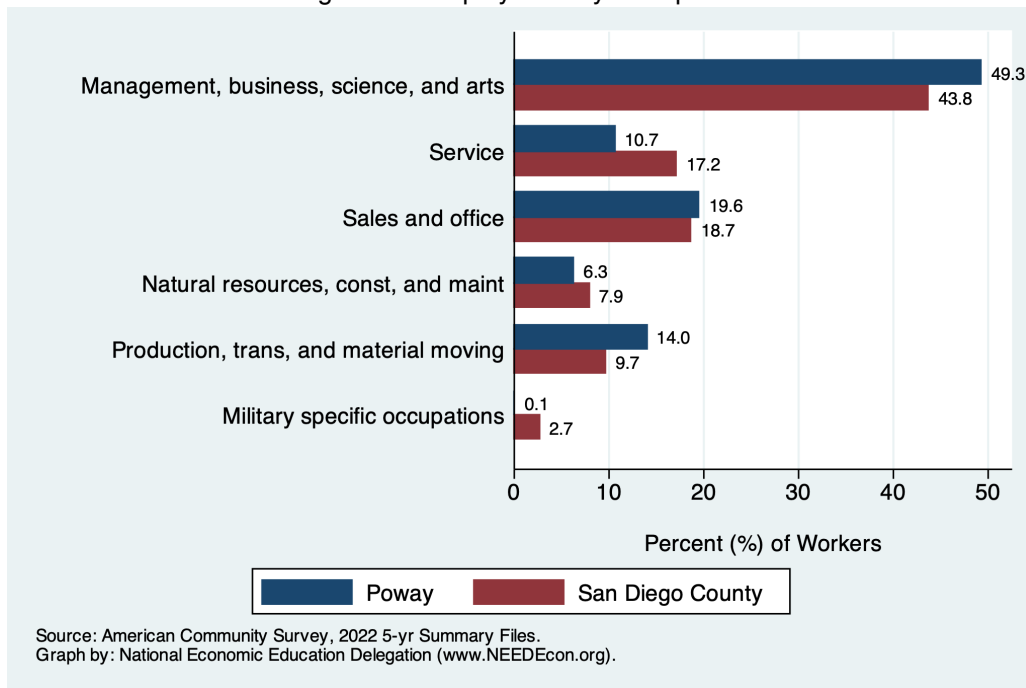


Figure 13: Employment by Industry

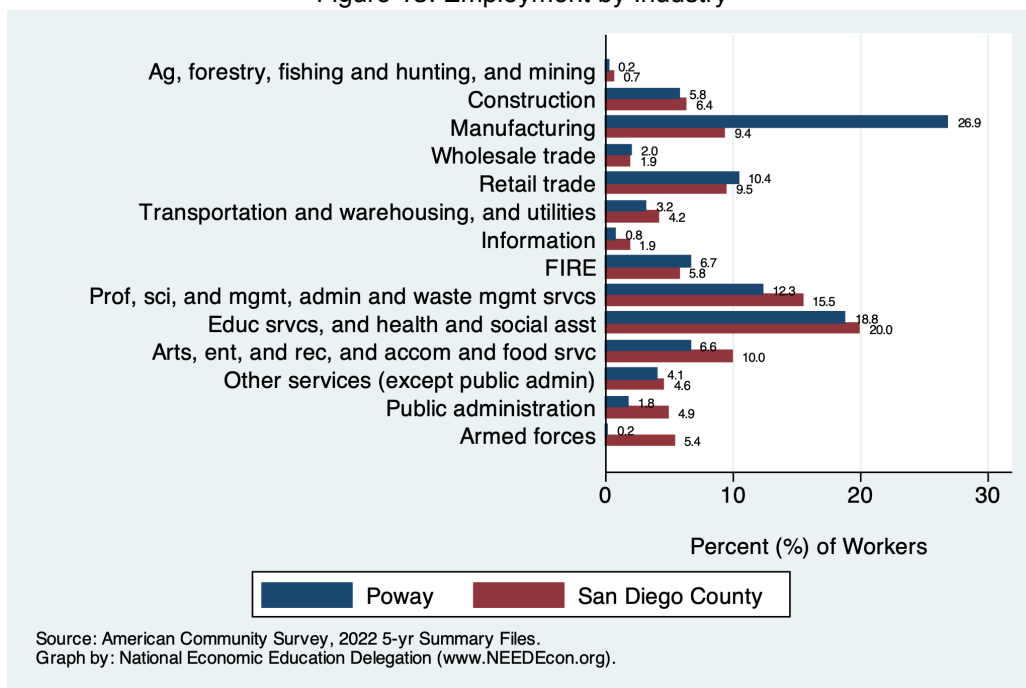


Figure 14: Language Spoken at Home

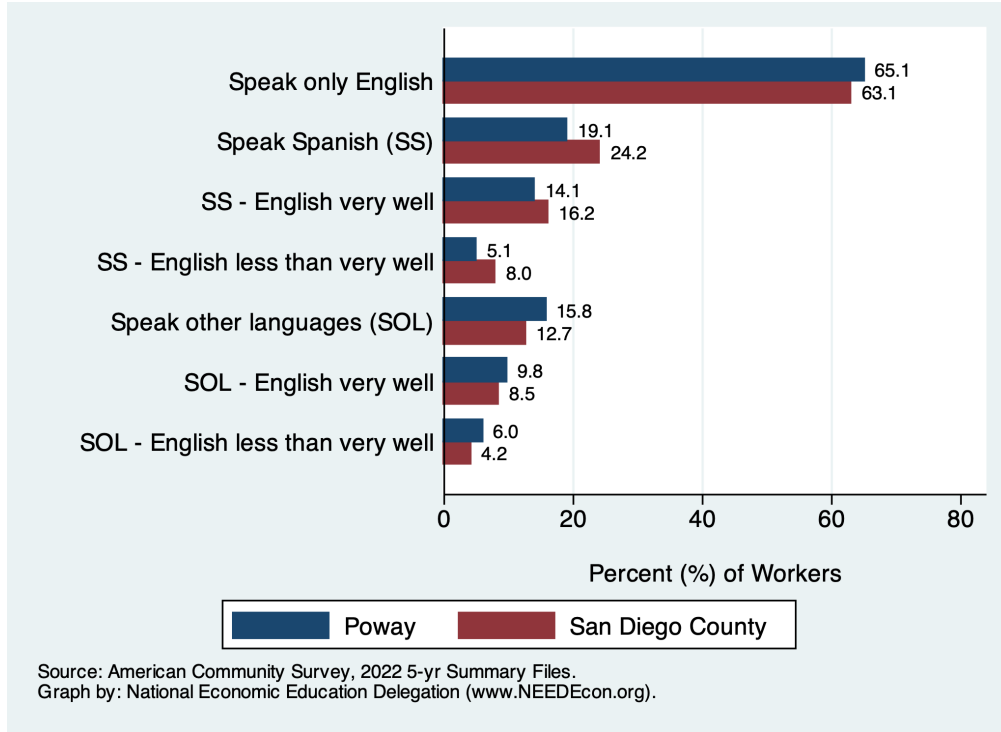
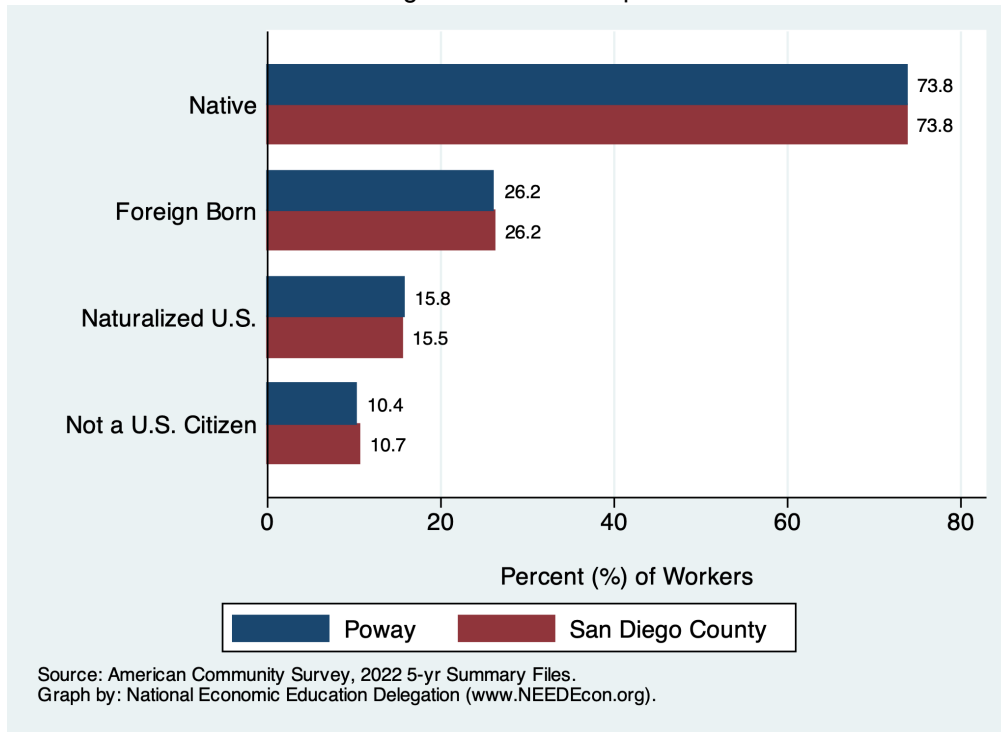


Figure 15: Citizenship



Employed Residents of Poway

Figure 16: Employment by Occupation

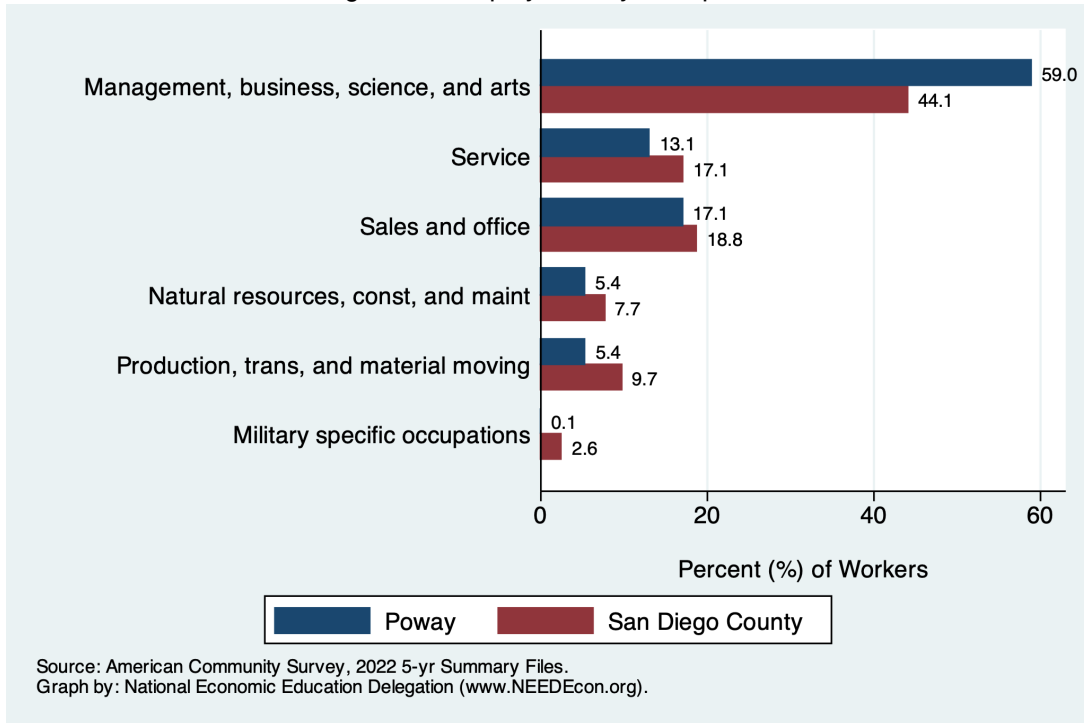


Figure 17: Employment by Industry

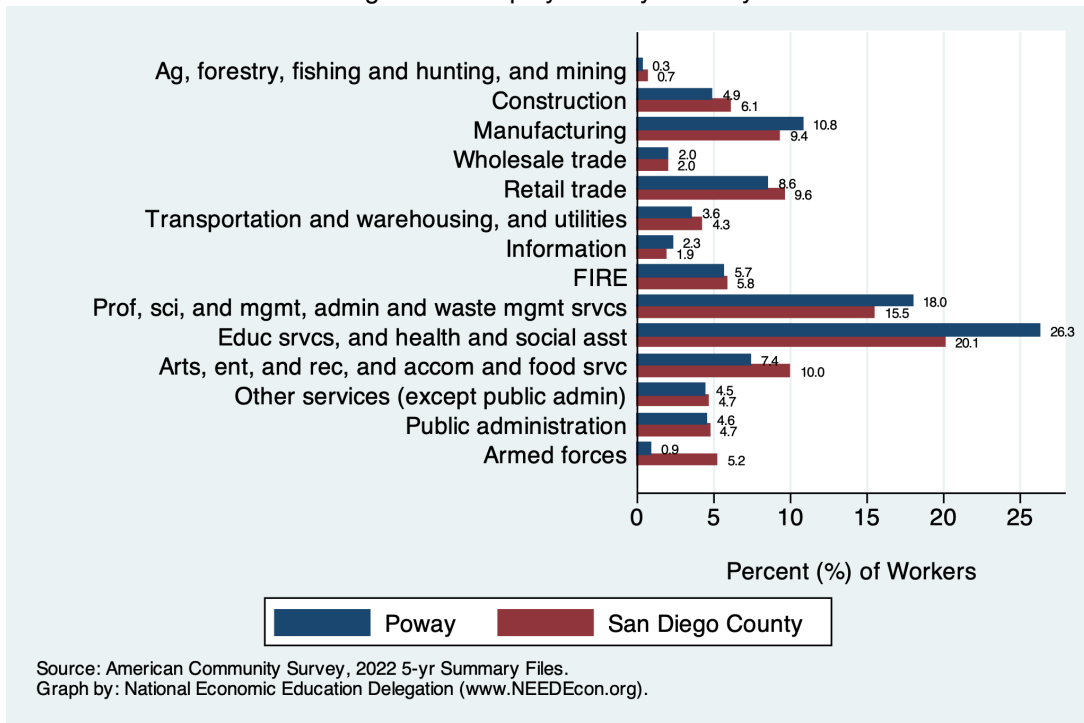
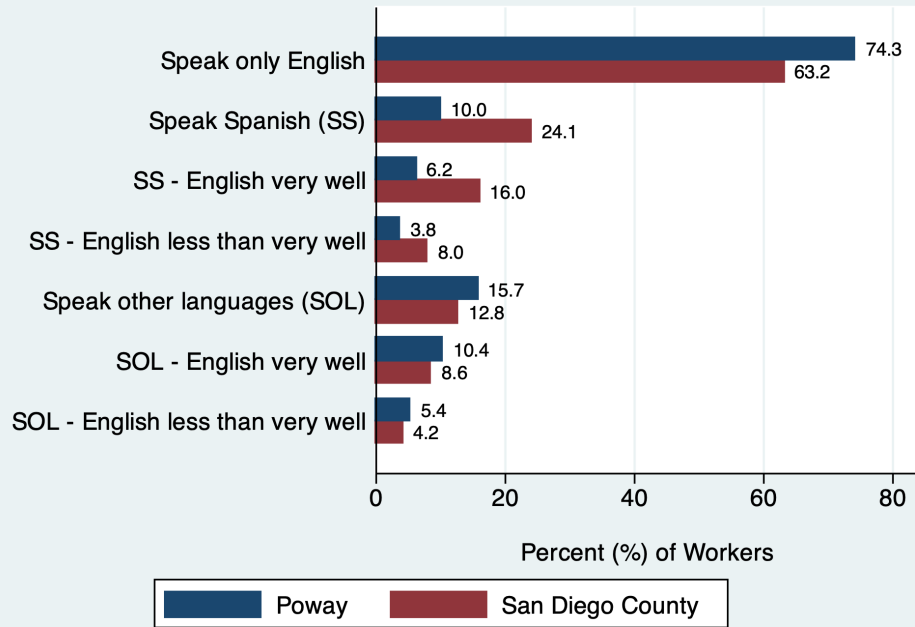
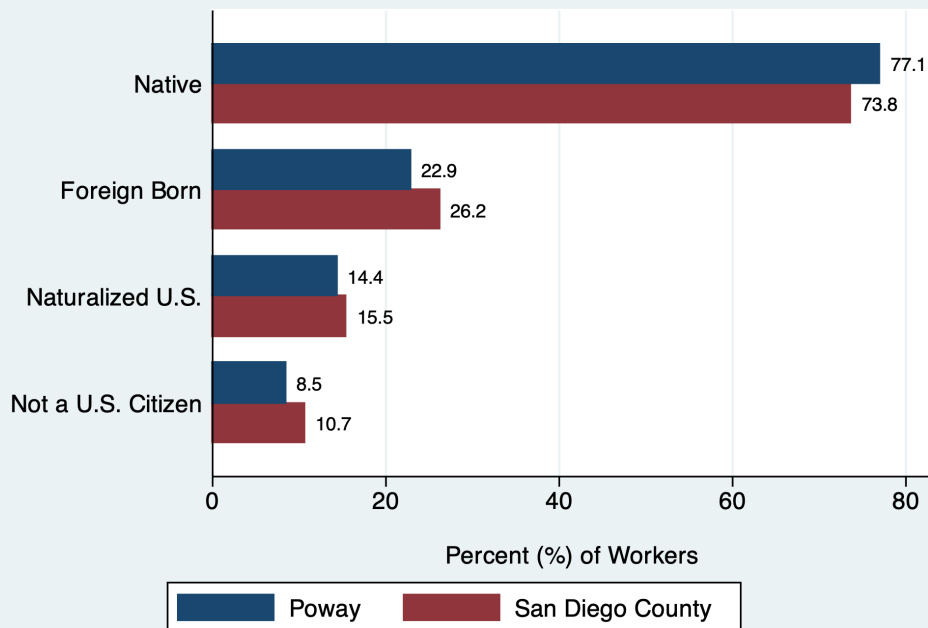


Figure 18: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
 Graph by: National Economic Education Delegation (www.NEEDecon.org).

Figure 19: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
 Graph by: National Economic Education Delegation (www.NEEDecon.org).

Employed Residents vs Workers in Poway

Figure 20: Employment by Occupation

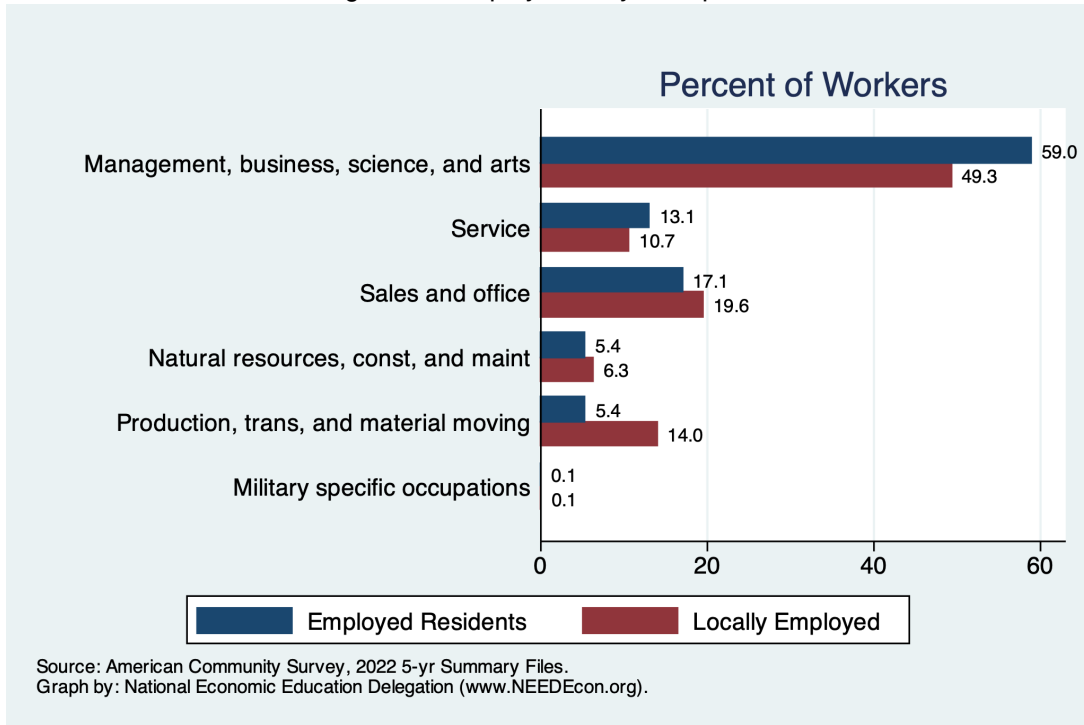


Figure 21: Employment by Industry

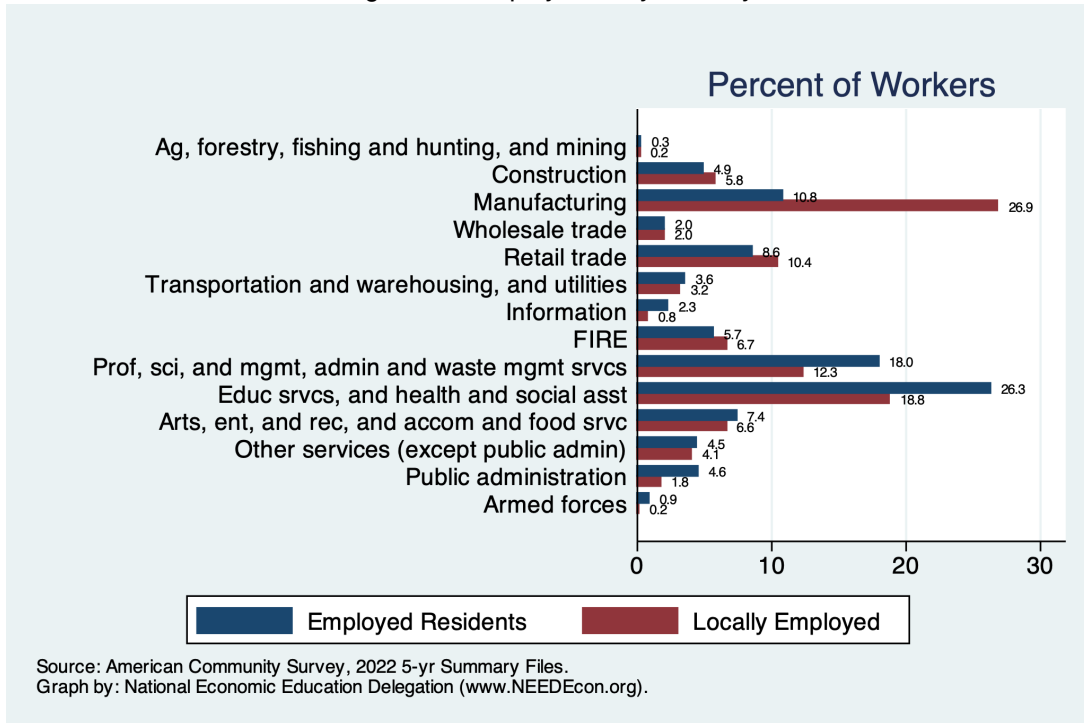


Figure 22: Language Spoken at Home

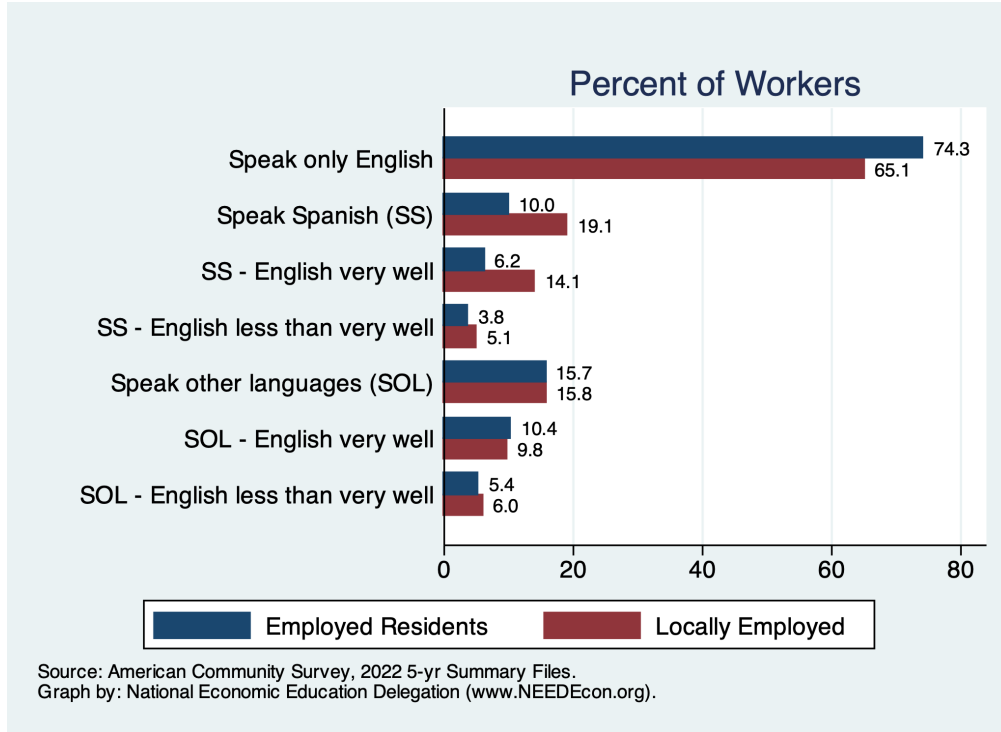
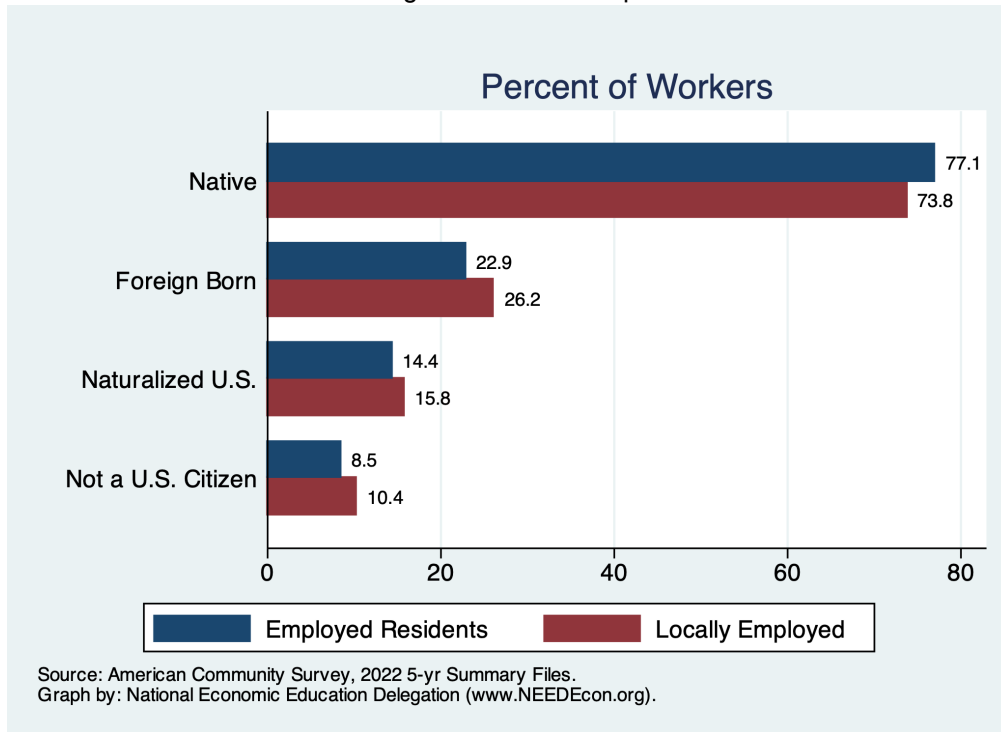


Figure 23: Citizenship



Income and Earnings

Per Capita Income Growth

Definition:

Per capita income is the average income per person in Poway. Personal income is the income received by, or on behalf of, all persons from all sources: from participation as laborers in production, from owning a home or unincorporated business, from the ownership of financial assets, and from government and business

in the form of transfer receipts. Noncash government benefits are not included.

Why is it important?

Income is the money that is available to persons for consumption expenditures, taxes, interest payments, transfer payments to governments and the rest of the world, or for saving. As such, it is an important indicator of economic well-being in a community.

Figure 24: Real Per Capita Income Ranking Among California Cities

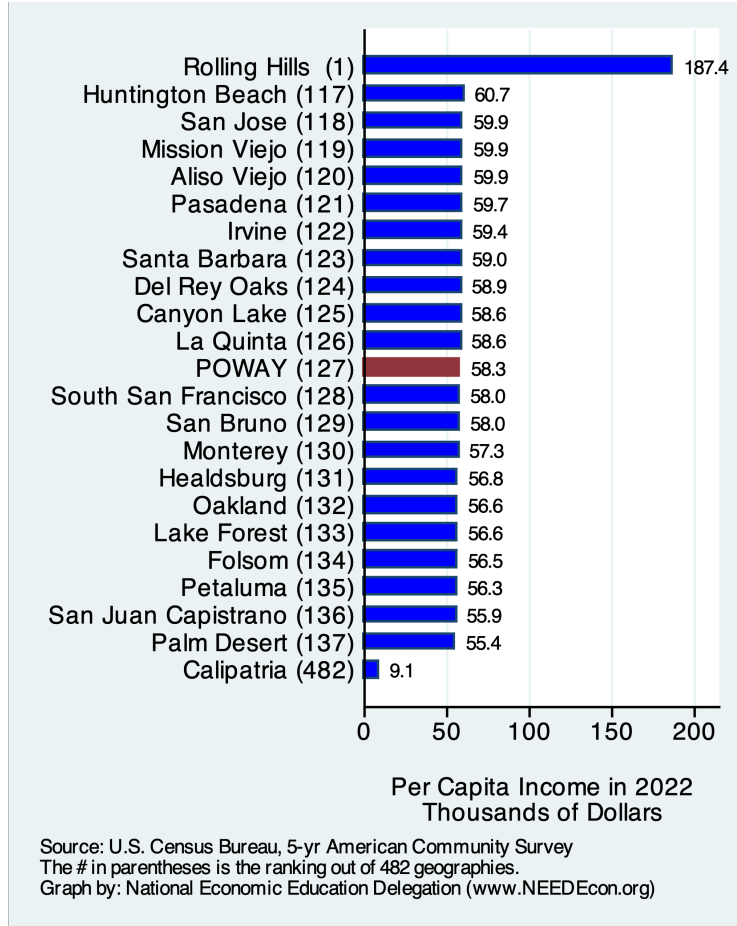
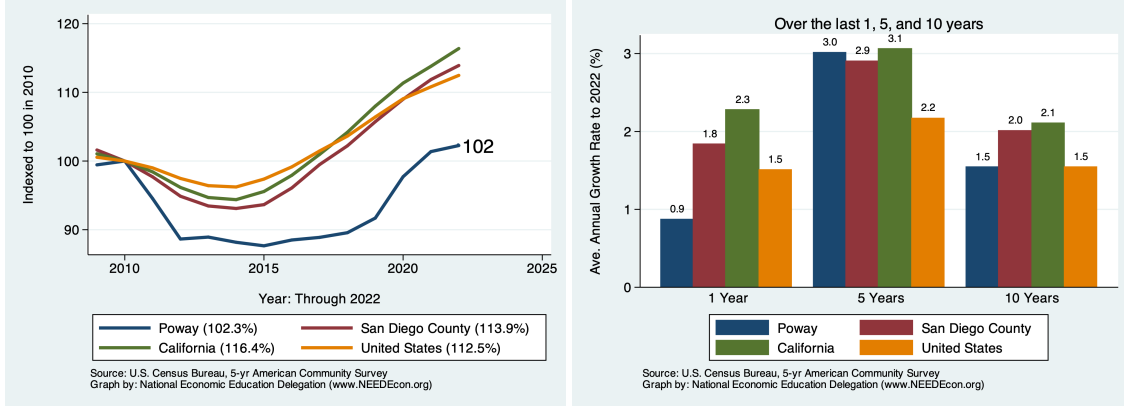


Figure 25: Regional Comparison of Growth over Time



Real Per Capita Income Ranking Among California Cities - w/Comparable Populations

Figure 26: Income Levels

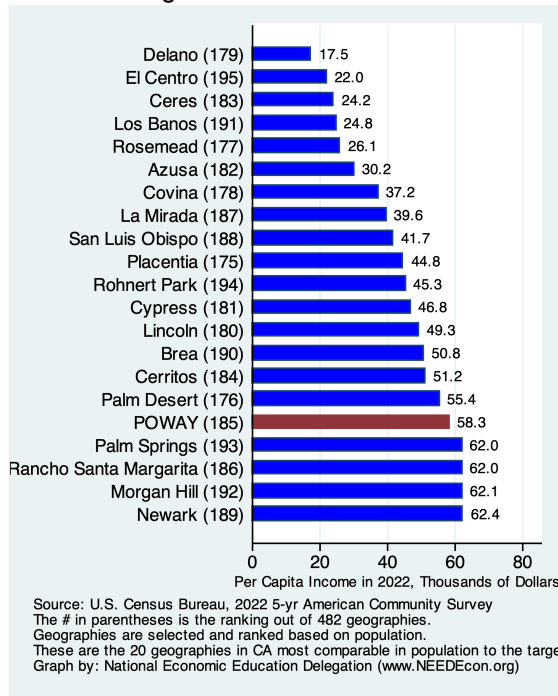
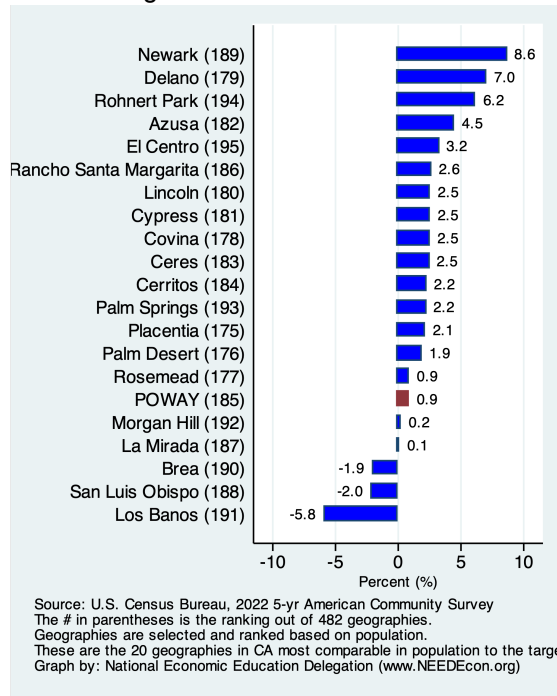


Figure 27: Growth over Time



Real Per Capita Income Ranking Among Cities in San Diego County

Figure 28: Income Levels

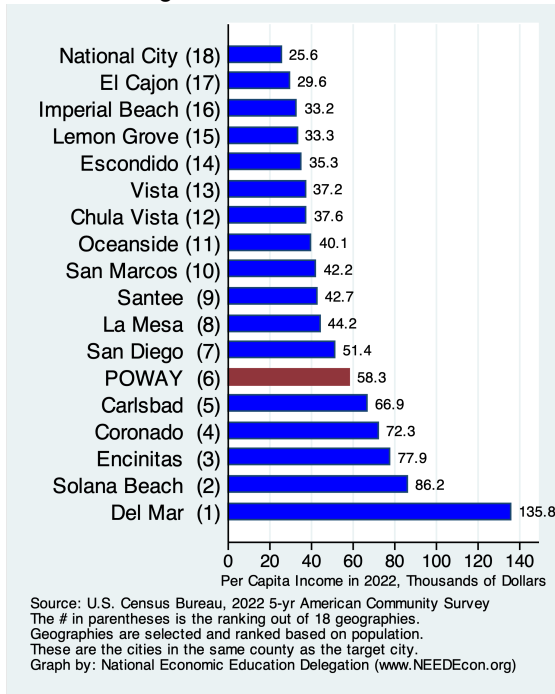


Figure 29: Growth over Time

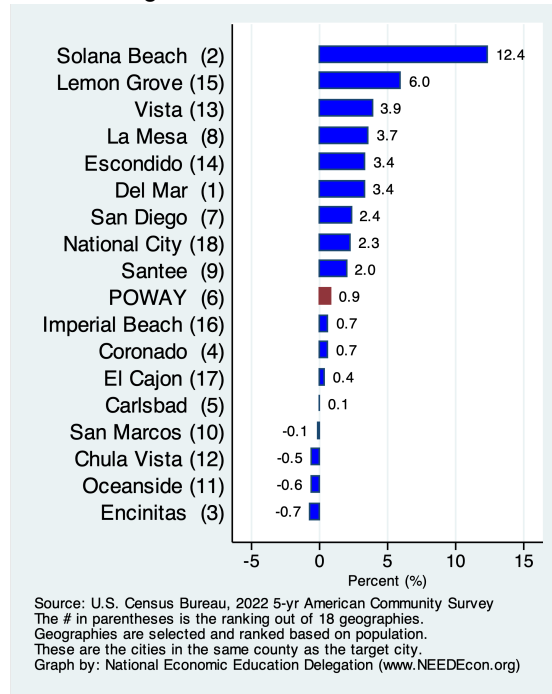
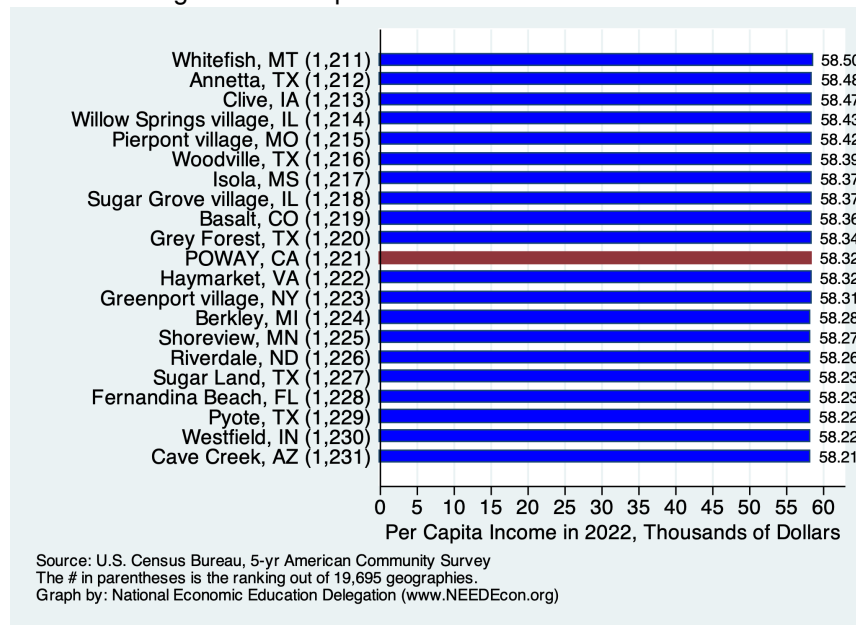


Figure 30: Comparison with All Cities Nationwide



Poverty and Inequality

Definition:

The local poverty rate provides an indication of the well-being of those at the bottom of the income distribution. The federal poverty rate measures the proportion of households in the region that are classified as living in poverty. Also included are measures of the extent to which the City's children are impoverished. Measures of the income distribution provide

further evidence on disparities in income in the region and how those disparities have changed over time.

Why is it important?

It is important to track measures of poverty and inequality to assess the extent of income disparities in the region, with an eye toward understanding how well the local economy is performing for all of its citizens.

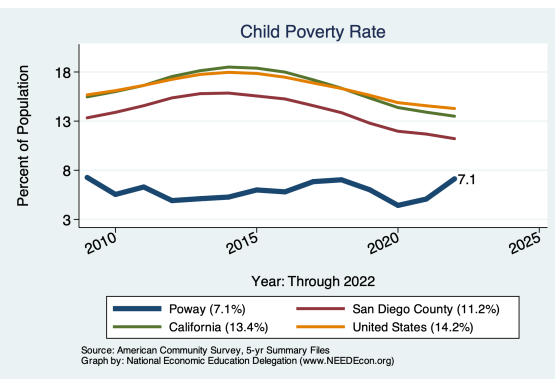
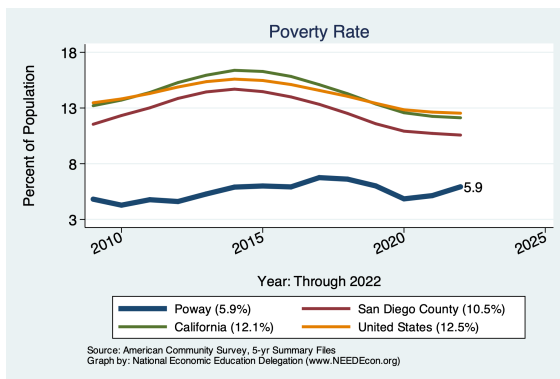


Figure 31: Inequality

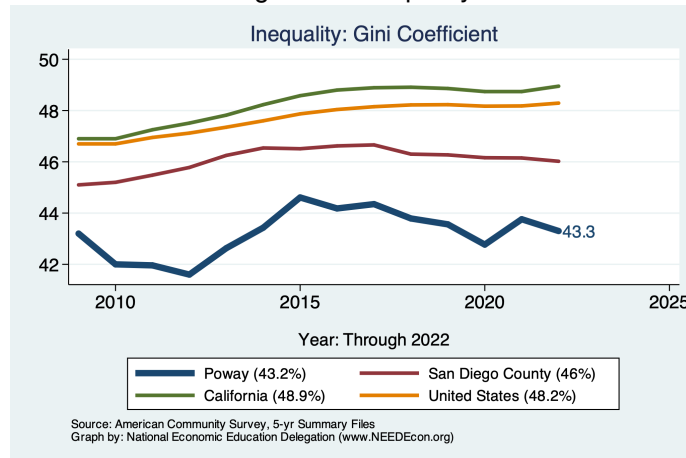


Figure 32: Shares Across the Income Distribution

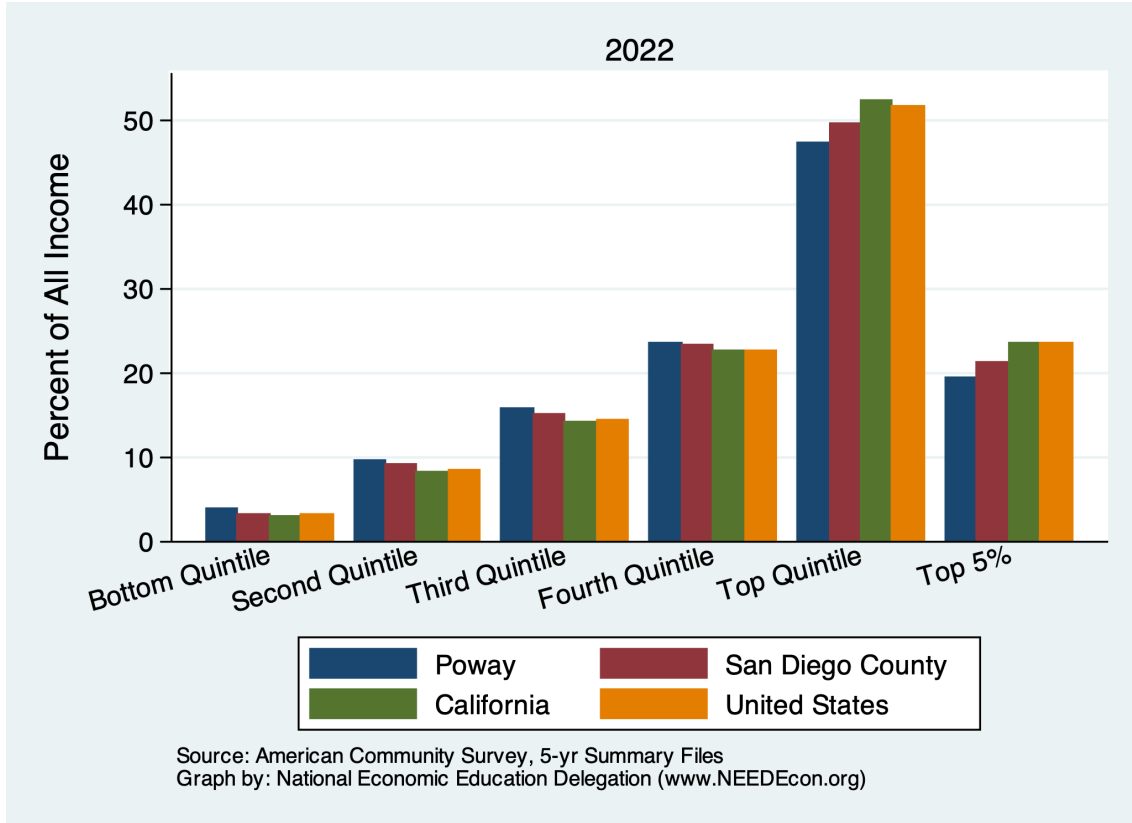
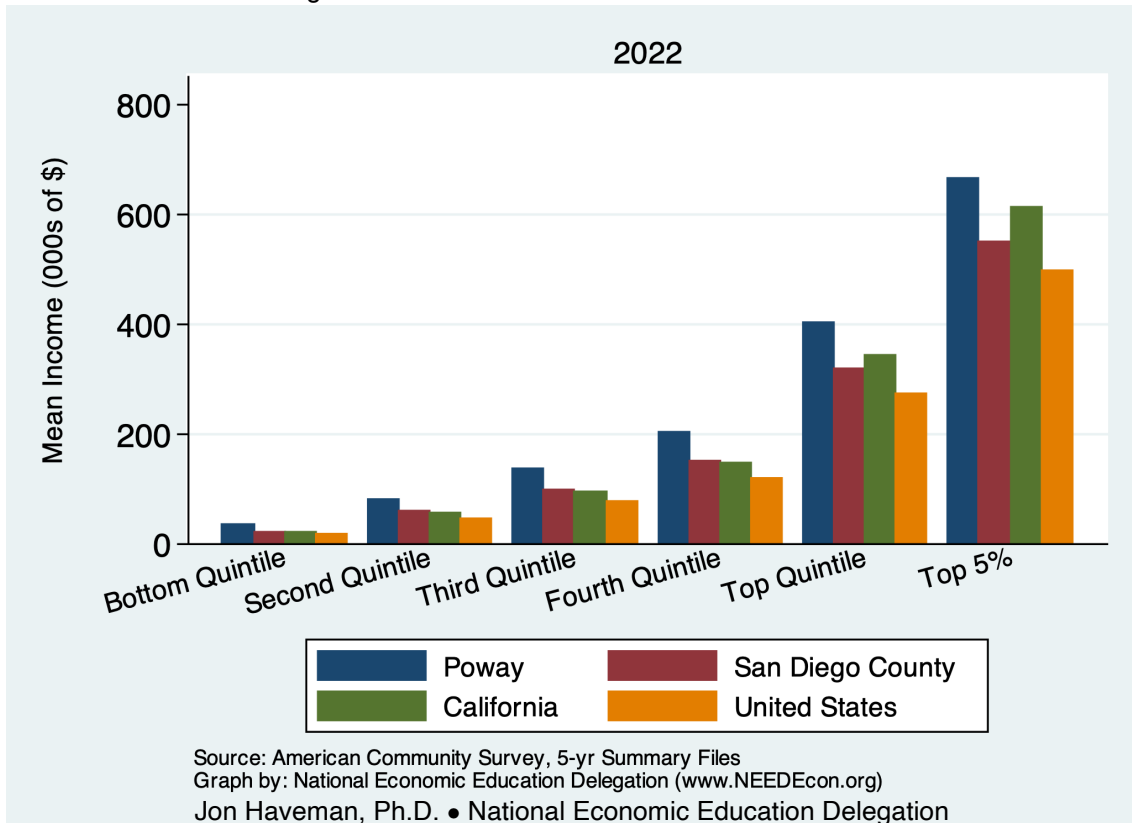


Figure 33: Means Across the Income Distribution



Housing

Housing Costs and Affordability

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. Housing burden is defined as a household needing to commit more than 30% of their household income toward housing costs. The median value is the amount in the middle. Fifty

percent of units are above the median and 50 percent are below.

Why is it important?

Housing is one of three fundamental necessities, along with food and clothing. A measure of the cost of housing is an integral part of the measurement of the cost of living in a specific community. This is particularly true in cities and regions throughout the Bay Area, where housing costs are high relative to income.

Cost of Housing in Poway and Broader Regions

Figure 34: Median Home Prices

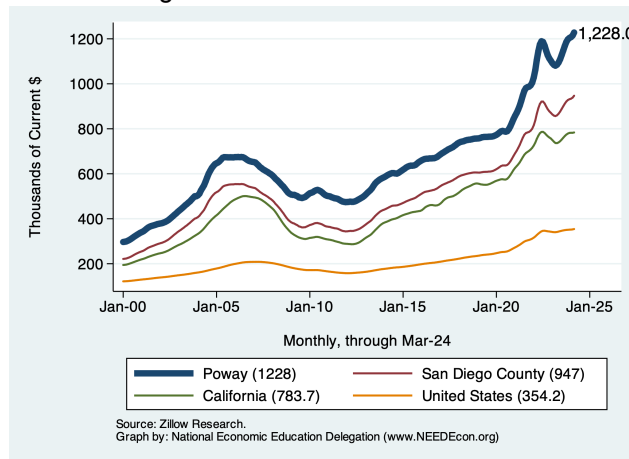
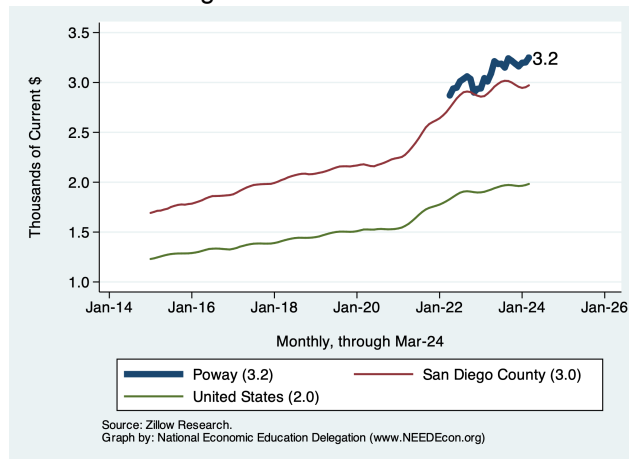


Figure 35: Median Rents



Housing Ownership in Poway and Broader Regions

Figure 36: Home Ownership Rates

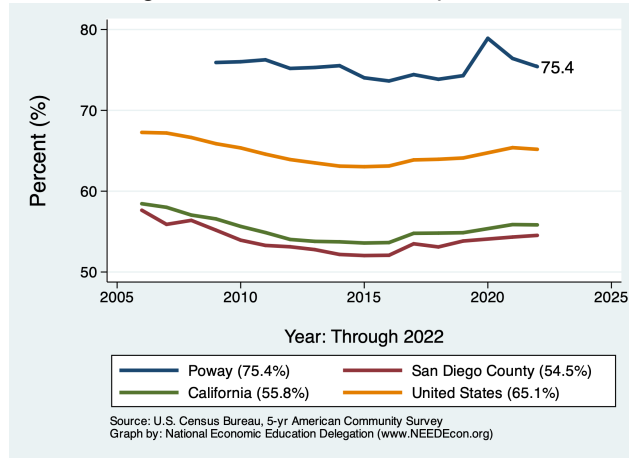


Figure 37: Home Ownership by Age

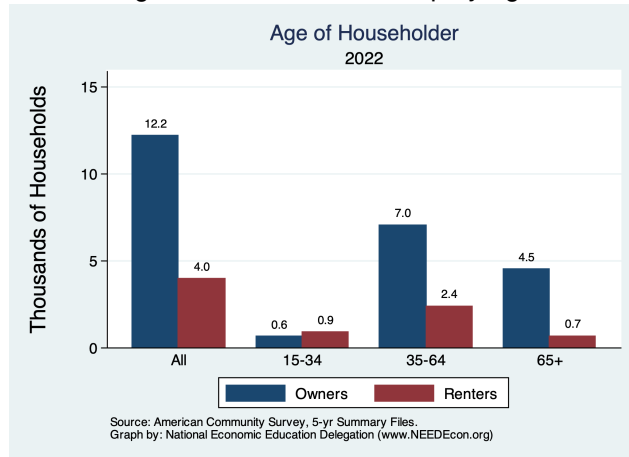


Figure 38: Income by Tenure

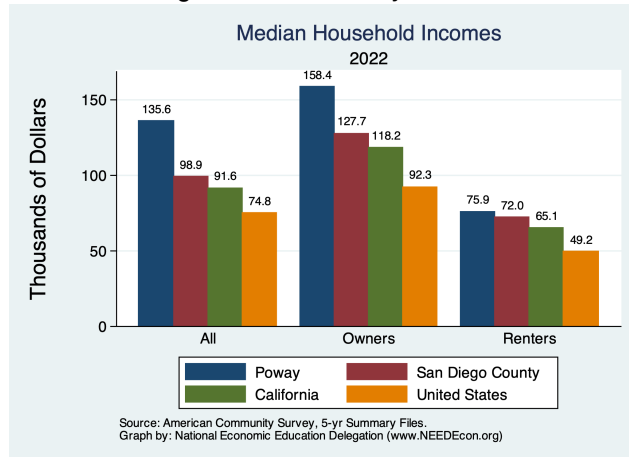


Figure 39: Income Distribution by Tenure

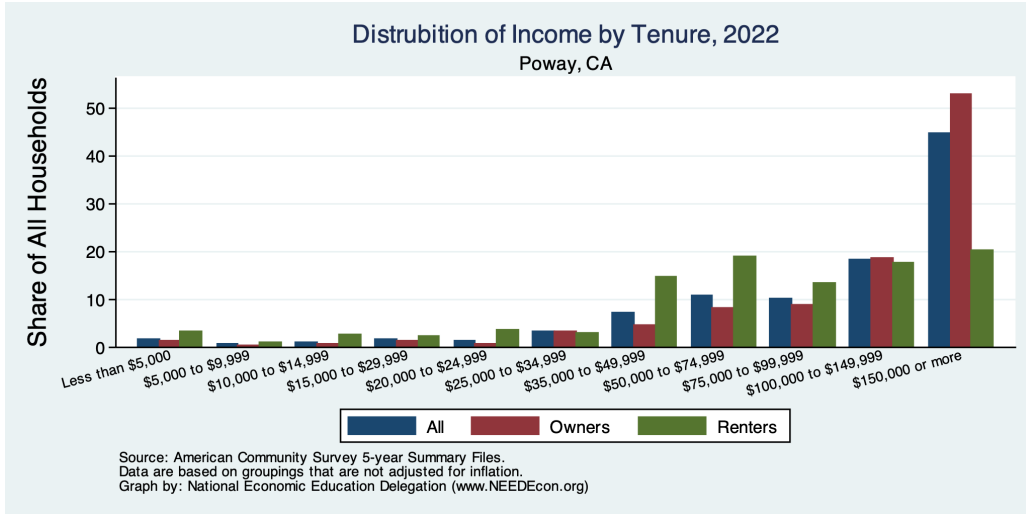


Figure 40: Income Distribution of Home Owners

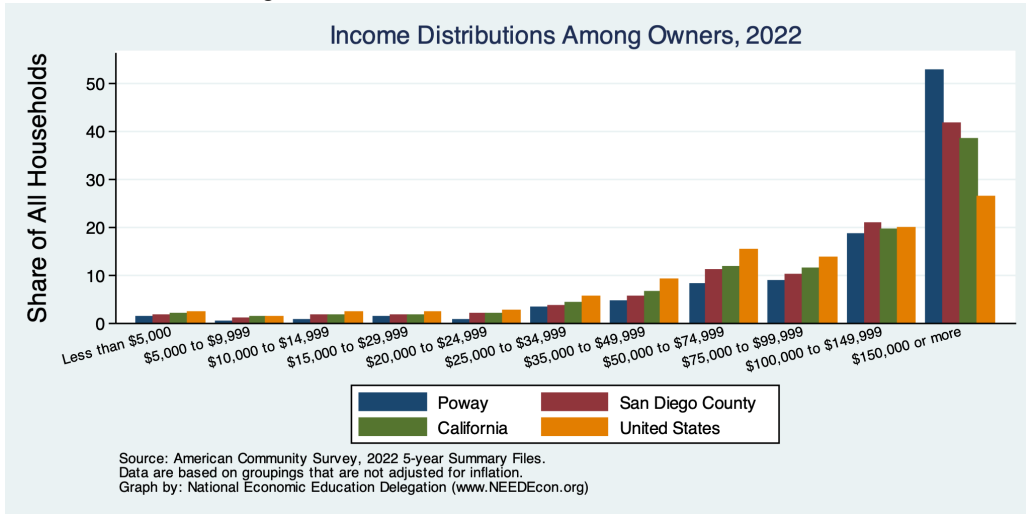
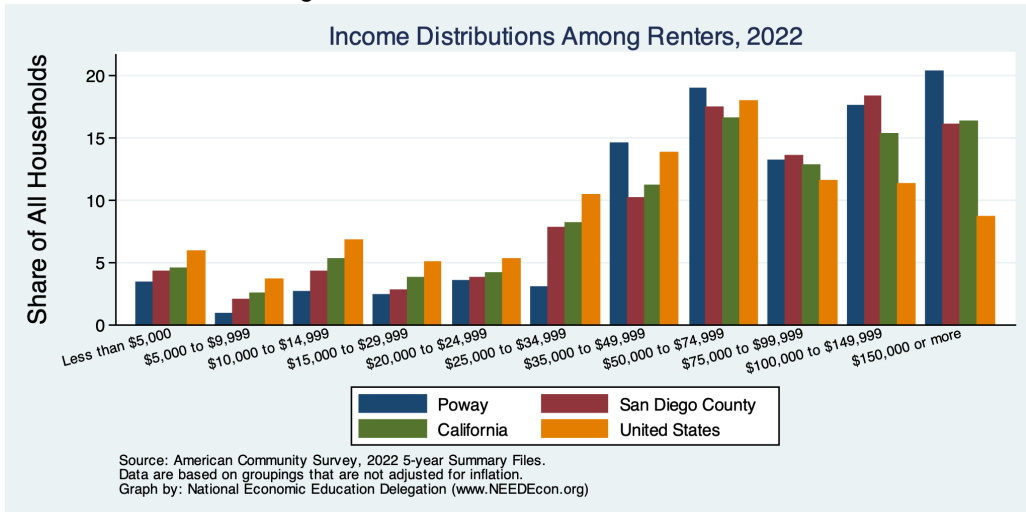


Figure 41: Income Distribution of Renters



Housing Burden in Poway and Broader Regions

Figure 42: Home Owners w/ A Mortgage

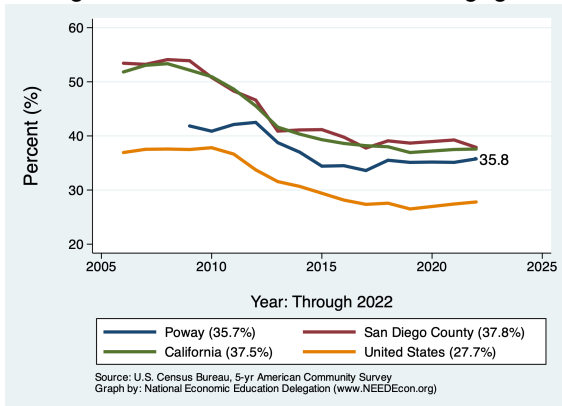


Figure 43: Home Owners w/o A Mortgage

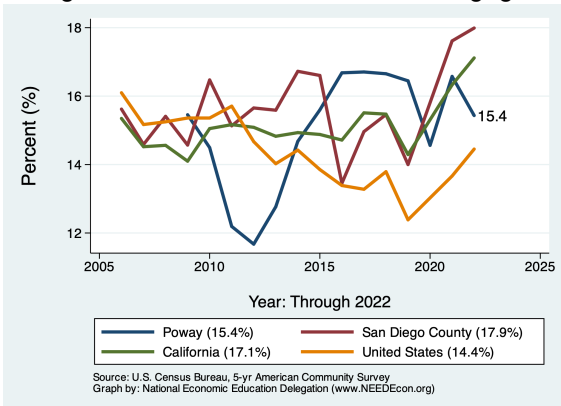


Figure 44: Renters

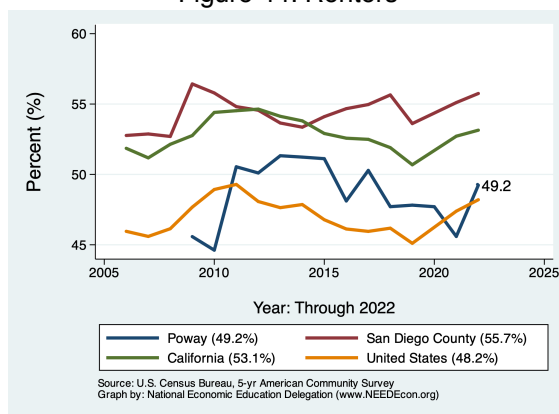
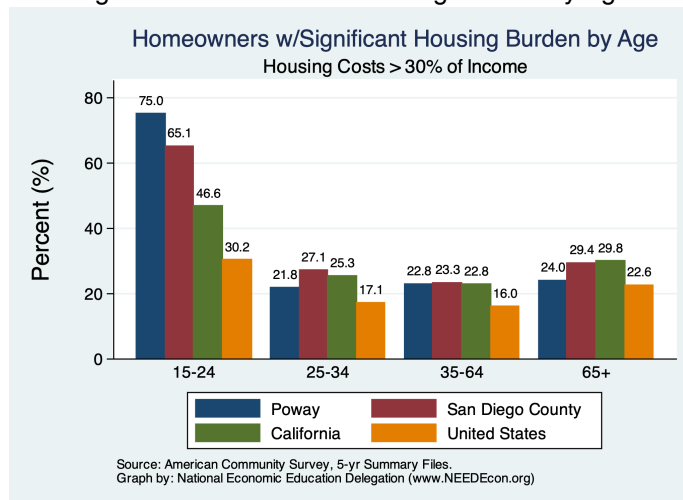


Figure 45: Homeowner Housing Burden by Age



Housing Picture

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

In areas where the rate of population growth exceeds the rate of housing growth, this is likely to reflect a tightening housing market. A tightening housing market will also likely be reflected in lower vacancy rates and higher occupancy rates. It may also be reflected in higher numbers of people per household.

Table 5. Housing Market Indicators

Indicator	2023	2019	2010	% Change from	
				2019	2010
Total Population	48,483.0	49,298.0	47,811.0	-1.7	1.4
Total # of Homes	17,129.0	16,917.0	16,715.0	1.3	2.5
# Occupied Units	16,628.0	16,280.0	16,128.0	2.1	3.1
Persons per Household	2.9	3.0	2.9	-3.8	-1.7
Vacancy Rate (%)	2.9	3.8	3.5	-22.3	-16.7

Source: CA DOF; Calculations by the National Economic Education Delegation

Figure 46: Housing Growth

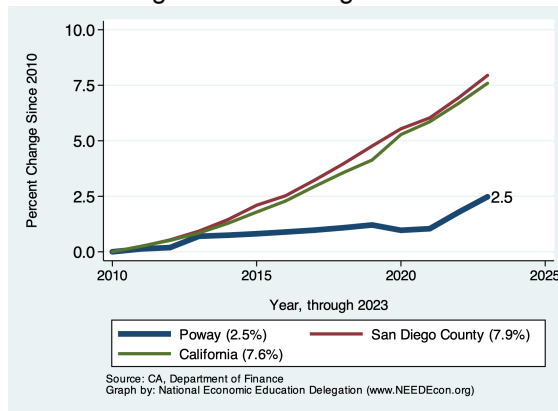


Figure 47: Persons per Household

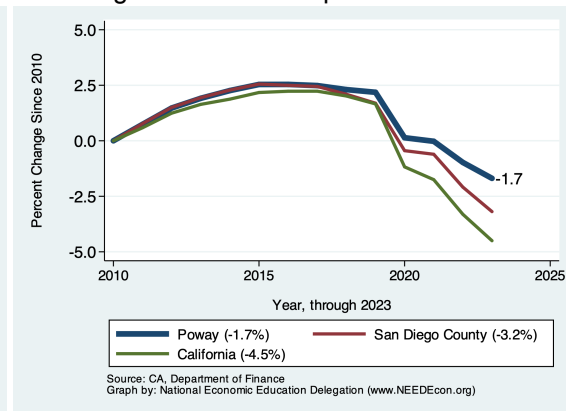


Figure 48: Vacancy Rates

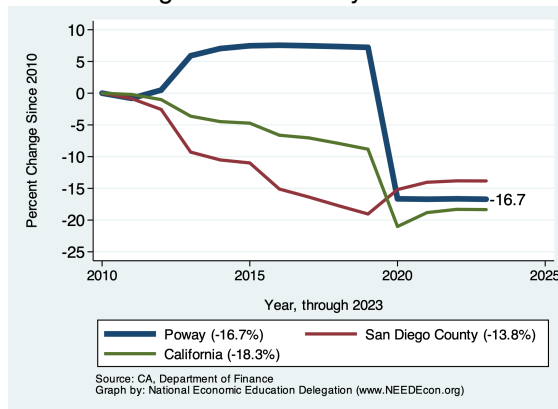
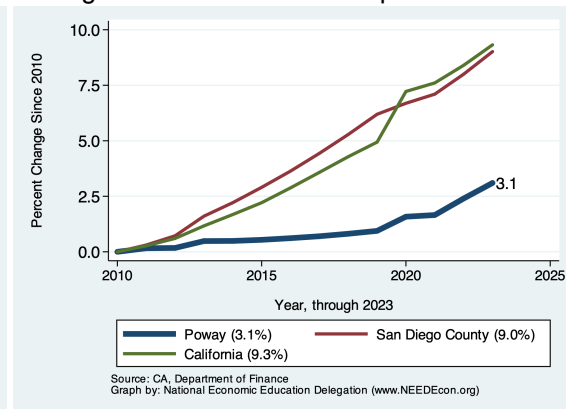


Figure 49: Number of Occupanied Units



Trends in the Growth of Housing by Housing Type

Figure 50: Single Detached Homes

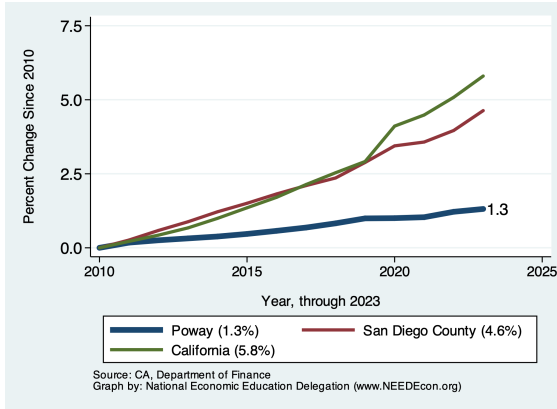


Figure 51: Single Attached Homes

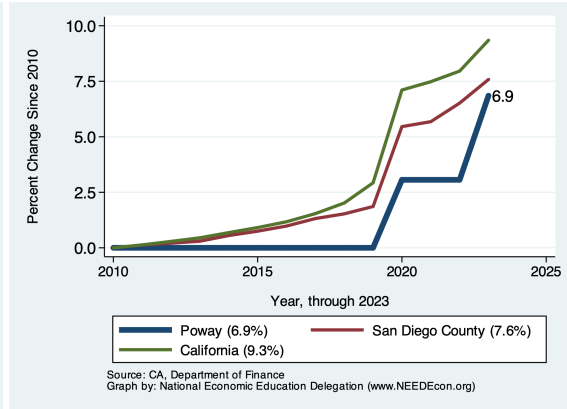


Figure 52: Housing in Buildings with Two to Four Units

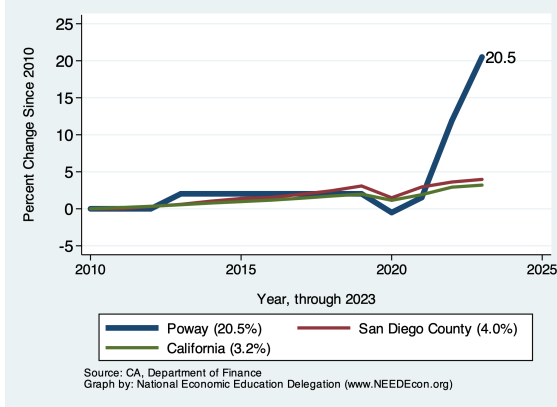
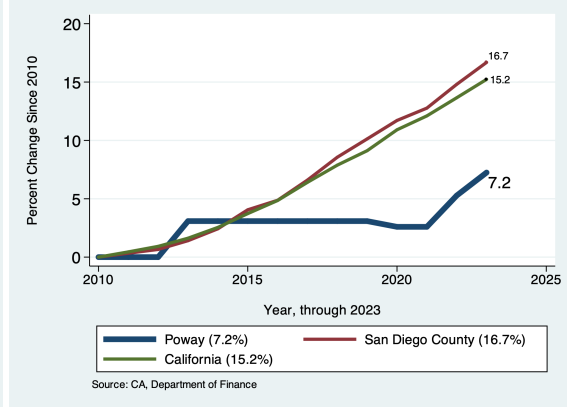


Figure 53: Housing in Buildings with Five or More Units



Vintage of Residential Housing

Why is it important?

This section provides evidence on the year in which residential housing in Poway was built. We break it down into owned versus rented residences and provide a comparison across San Diego County and broader regions. A sense of the age of housing in a region provides an indication of the urgency with which a region might pursue additional housing. As the

housing stock ages, an urgency with which renovations and rebuilds are permitted might result. All things equal, more recently constructed housing will be more likely to meet current codes and standards. Remodeling of existing units will be more desirable when existing units are, on average, older.

Figure 54: Distribution of Housing Construction

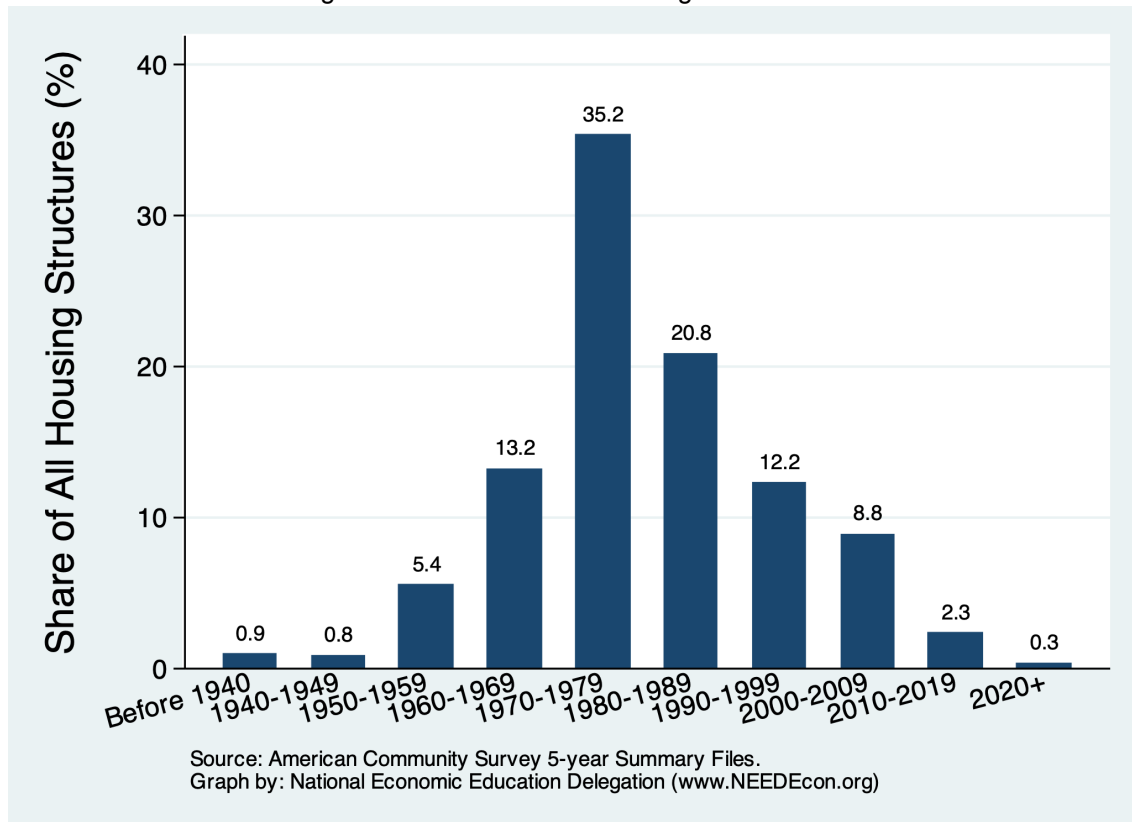


Figure 55: Housing Vintage across Regions

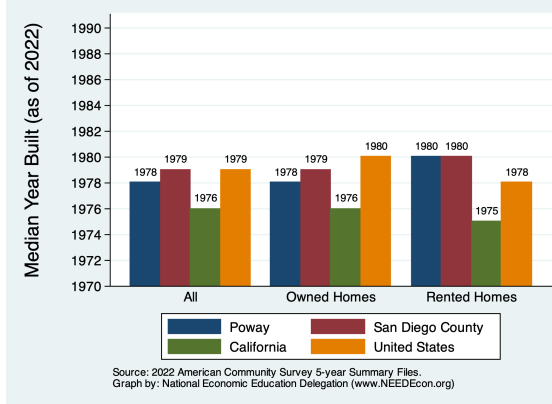


Figure 56: Housing Vintage by Tenure

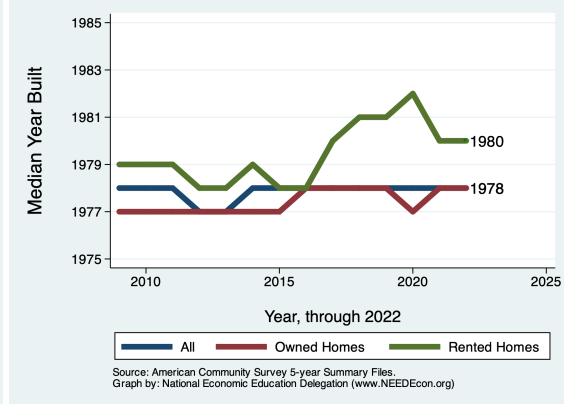


Figure 57: Vintage of Owned Residences

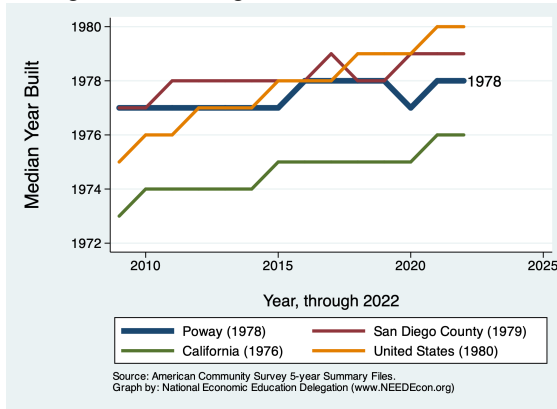


Figure 58: Vintage of Rented Residences

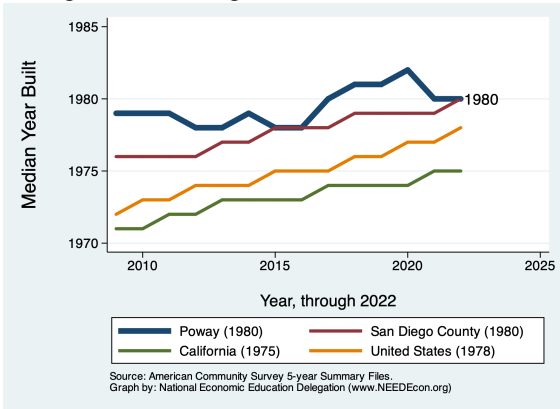
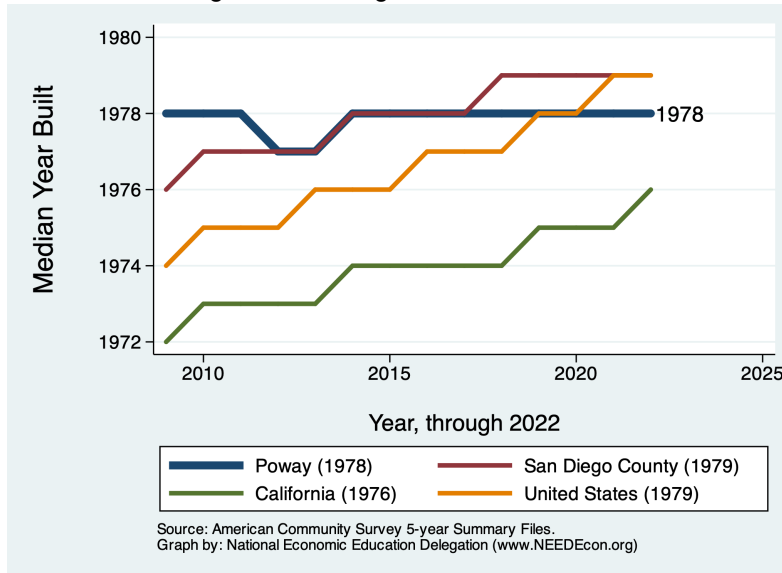


Figure 59: Vintage of All Residences



Occupation of Residential Housing

Why is it important?

The duration of residence in a city is important for developing future policies regarding growing the local population. If a region is highly mobile, evidenced by most residences having

been recently occupied, a city might propose policies to reduce that mobility, or ask why the mobility happens. Policies could be put in place to either reduce or increase migration.

Figure 60: Year Current Occupant Moved In

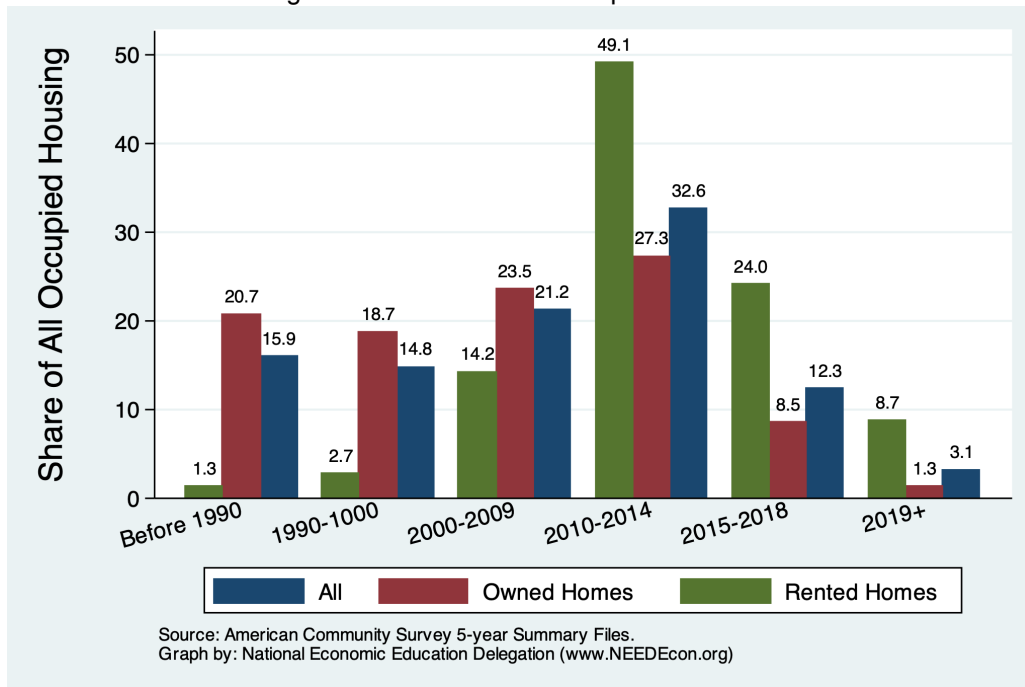


Figure 61: Year Occupied by Current Residents across Regions

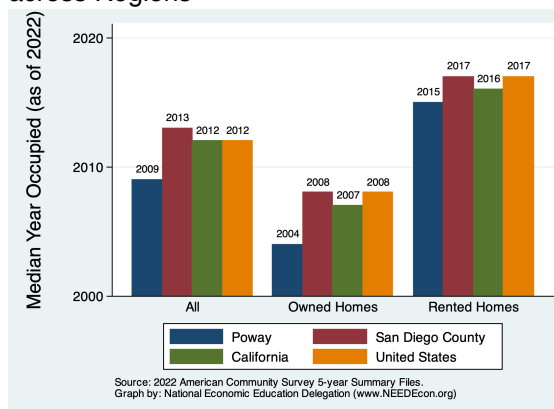


Figure 62: Year Occupied by Current Residents by Tenure

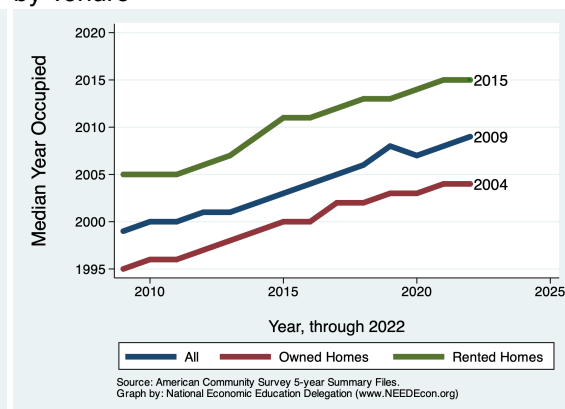


Figure 63: Year Occupied by Current Residents for Owned Housing

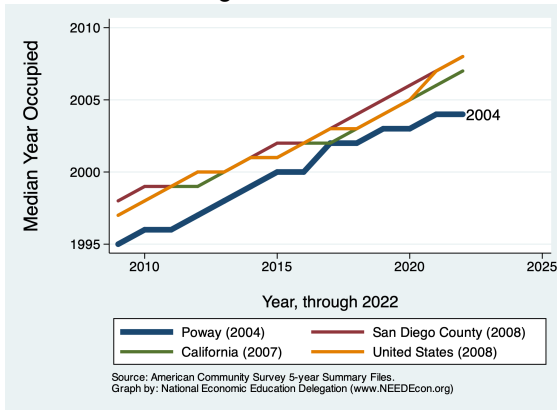


Figure 64: Year Occupied by Current Residents for Rented Housing

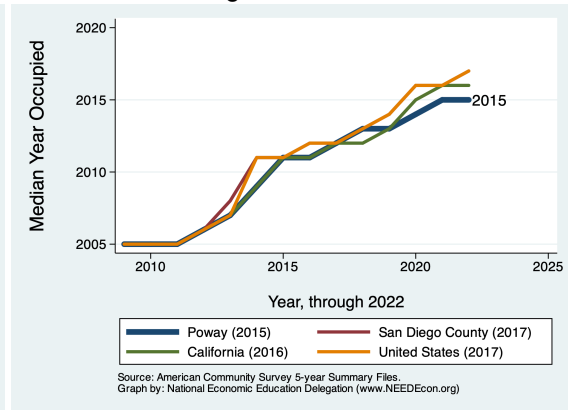
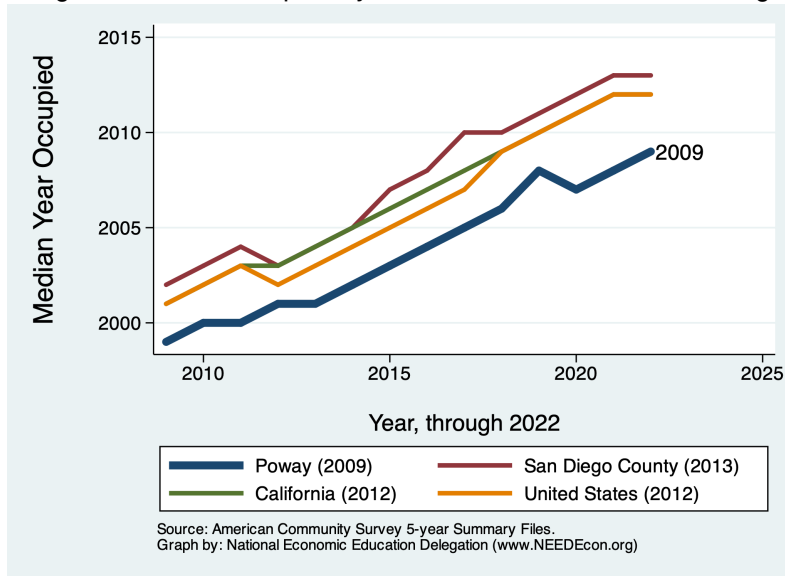


Figure 65: Year Occupied by Current Residents for All Housing



Residential Permitting

Definition:

This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for Poway is compared with data from San Diego County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to facilitate comparisons across regions.

Why is it important?

Building permits are the best indicator available of new units coming on the market. In order for a region's population to grow and flourish, new residential properties must be added to the existing stock. Building, both in the City and in the County more generally, is an indication of the extent to which new residences accommodate new residents or are affecting prices through increased supply.

Poway - Ranking Among Comparables

Figure 66: Number of Units Permitted - Nationwide Comparables (Rank)

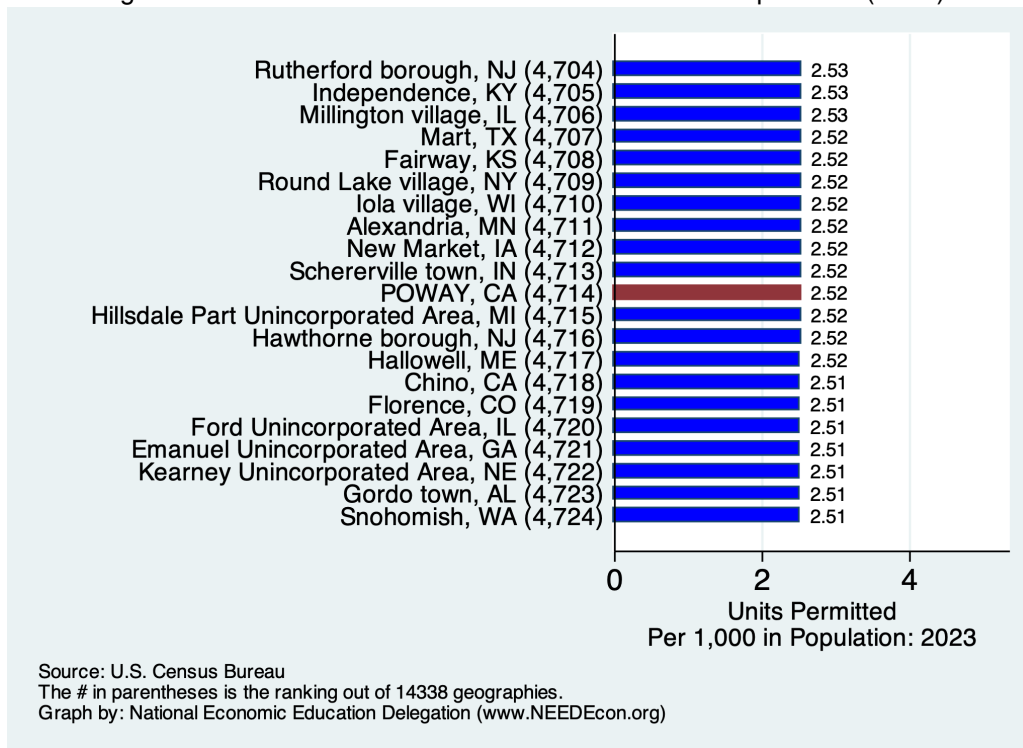
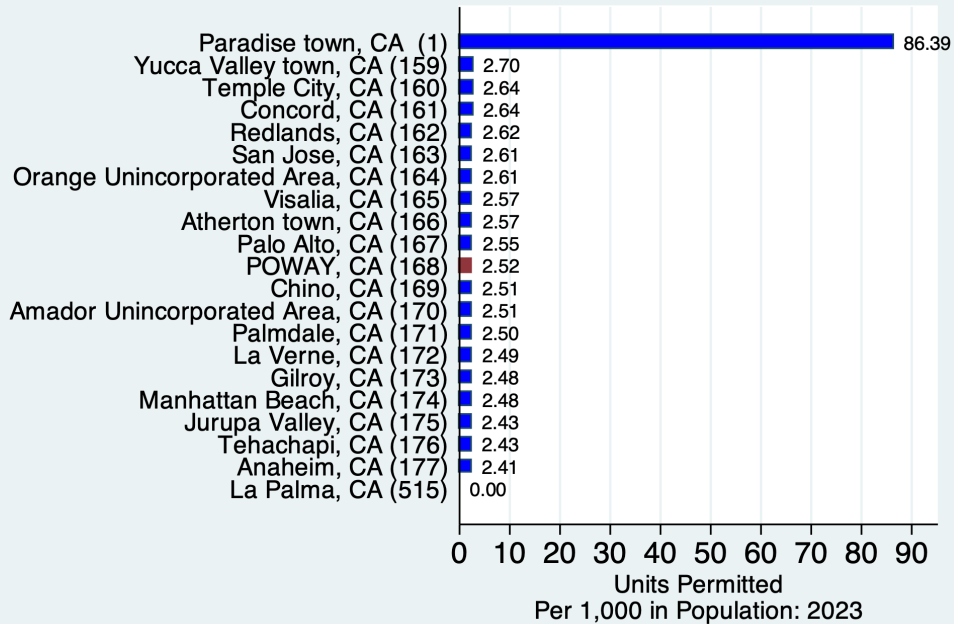
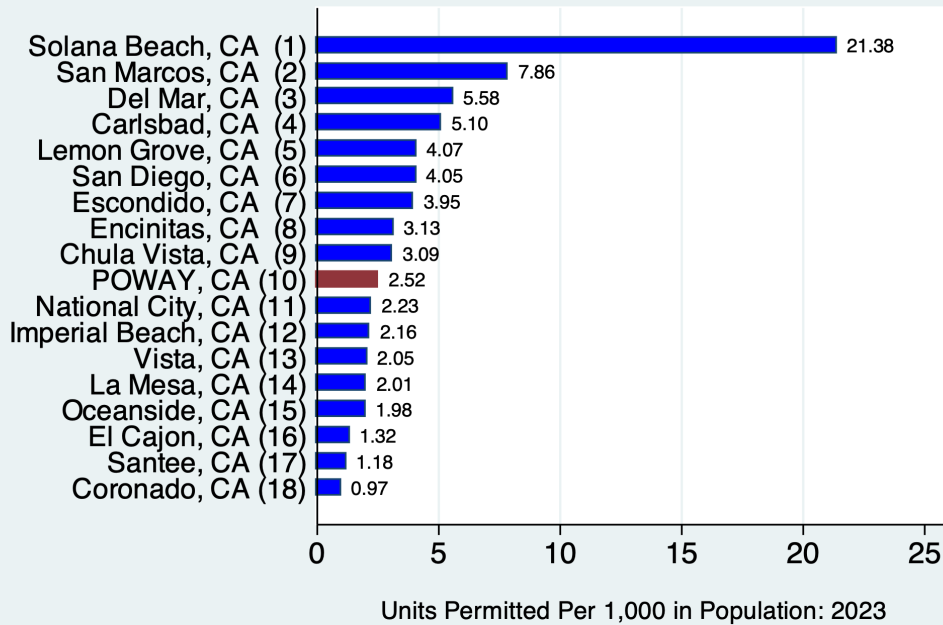


Figure 67: Number of Units Permitted - California Comparables (Rank)



Source: U.S. Census Bureau.
 The # in parentheses is the ranking out of 515 geographies.
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

Figure 68: Number of Units Permitted - Cities in San Diego County (Rank)



Source: U.S. Census Bureau,
 The # in parentheses is the ranking out of 18 geographies.
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

Poway - Permitting Activity

Annual Units Permitted - Per Capita in Poway

Figure 69: Units Permitted Each Year

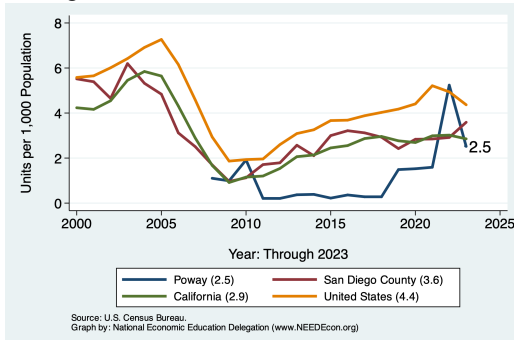
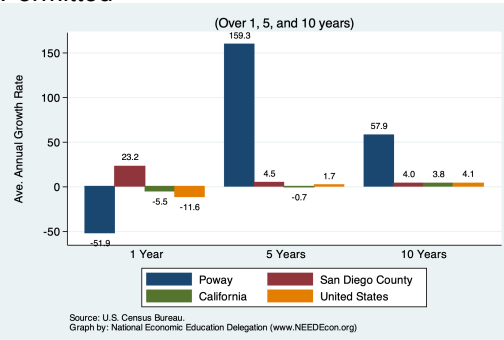


Figure 70: Average Annual Growth in Units Permitted



Annual Number of Buildings Permitted - Per Capita in Poway

Figure 71: Units Permitted Each Year

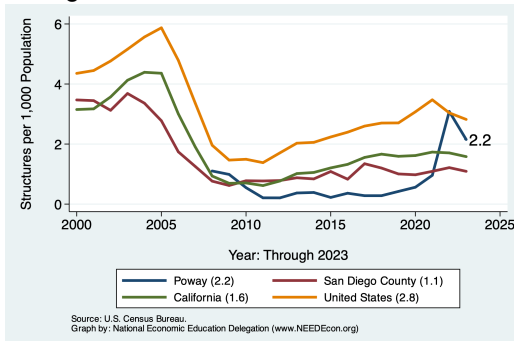
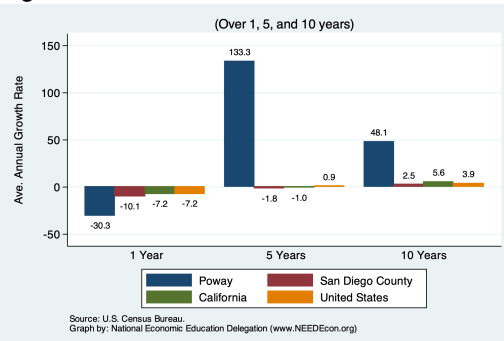


Figure 72: Average Annual Growth in Buildings Permitted



Annual Value of Property Permitted - Per Capita in Poway

Figure 73: Value Permitted Each Year

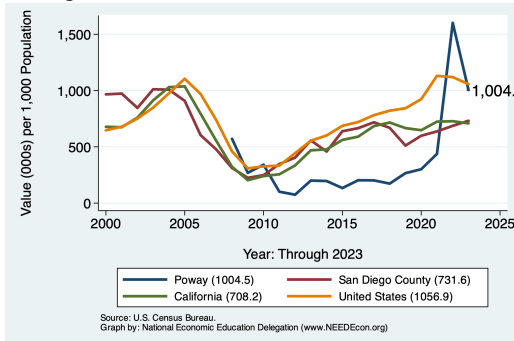
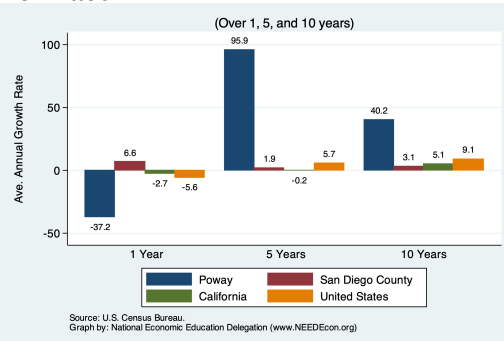


Figure 74: Average Annual Growth in Value Permitted



Commute Patterns

During the recovery from the Great Recession, the period from 2010 to 2019, the Bay Area economy, and Silicon Valley in particular, has been growing at a pace roughly double that of the state as a whole and triple that of the nation. This growth has precipitated a tight hous-

ing market and also brought about some significant changes in commute patterns, many of which have been reversed by the pandemic. Recent years have seen significant changes in both the mode of transportation and commute times.

Mode of Transportation

Figure 75: Percent of Workers Commuting by Car Alone

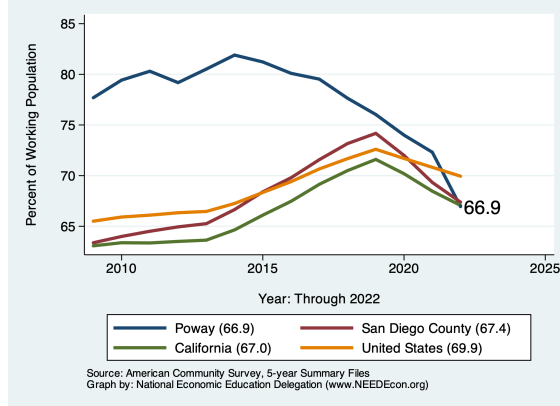


Figure 76: Percent of Workers Commuting by Carpool

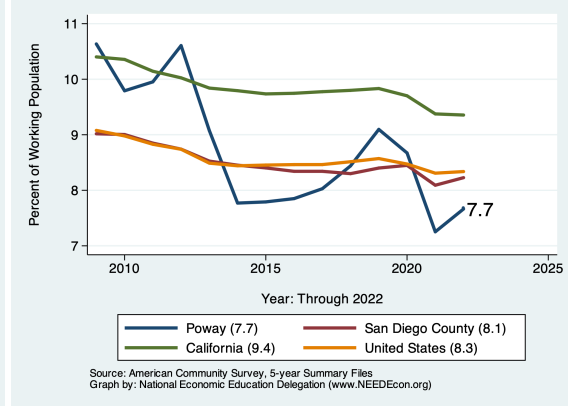


Figure 77: Percent of Workers using Public Transportation

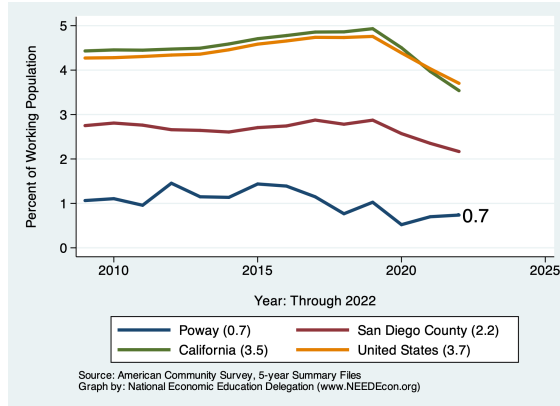
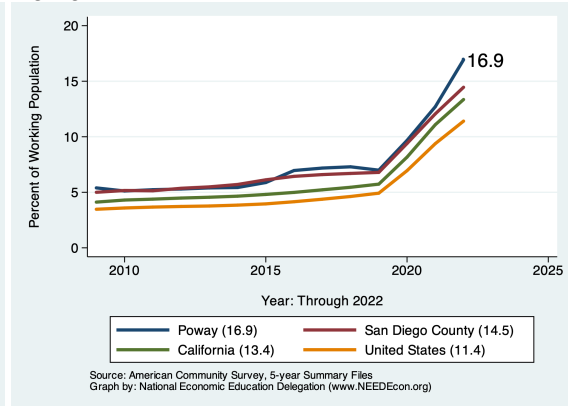


Figure 78: Percent of Workers Who Work From Home



The first table on this page presents data for those who LIVE in Poway. The second provides data on those who work, but do not necessarily live in Poway. The final two columns provide for a comparison of commute mode choices of people locally with those in California more broadly.

Table 6. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van:	9,917	74.6	7,684	69.5	17,601	74.6	78.0
Drove Alone	9,016	67.9	6,777	61.3	15,793	66.9	68.4
Carpooled:	901	6.8	907	8.2	1,808	7.7	9.5
In 2-person carpool	706	5.3	668	6.0	1,374	5.8	6.9
In 3-person carpool	157	1.2	126	1.1	283	1.2	1.5
In 4-or-more-person carpool	38	0.3	113	1.0	151	0.6	1.1
Public Transportation (excl Taxi):	106	0.8	68	0.6	174	0.7	3.6
Bus or Trolley Bus	79	0.6	68	0.6	147	0.6	2.3
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.8
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	27	0.2	0	0.0	27	0.1	0.1
Bicycle	111	0.8	7	0.1	118	0.5	0.7
Walked	224	1.7	96	0.9	320	1.4	2.4
Taxicab, Motorcycle, or other	290	2.2	150	1.4	440	1.9	1.7
Worked at Home	2,131	16.0	1,863	16.8	3,994	16.9	13.6
Total:	12,779	96.2	9,868	89.2	22,647	96.0	

Source: 2022 5-year American Community Survey, Summary File

Table 7. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van:	17,499	85.5	11,998	80.1	29,497	84.5	78.0
Drove Alone	16,143	78.9	10,080	67.3	26,223	75.1	68.5
Carpooled:	1,356	6.6	1,918	12.8	3,274	9.4	9.5
In 2-person carpool	950	4.6	1,427	9.5	2,377	6.8	6.9
In 3-person carpool	224	1.1	243	1.6	467	1.3	1.5
In 4-or-more-person carpool	182	0.9	248	1.7	430	1.2	1.1
Public Transportation (excl Taxi):	17	0.1	82	0.5	99	0.3	3.6
Bus or Trolley Bus	17	0.1	82	0.5	99	0.3	2.3
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.8
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	50	0.2	9	0.1	59	0.2	0.7
Walked	310	1.5	173	1.2	483	1.4	2.4
Taxicab, Motorcycle, or other	388	1.9	66	0.4	454	1.3	1.7
Worked at Home	2,131	10.4	1,863	12.4	3,994	11.4	13.6
Total:	20,395	99.6	14,191	94.8	34,586	99.1	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Times for Employed Residents

Table 8. SEX OF WORKERS BY TRAVEL TIME TO WORK

Mode of Transit	Male		Female		All Workers		All of CA
	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	83	0.7	151	1.5	234	1.0	2.0
5 to 9 minutes	917	7.2	678	6.6	1,595	7.1	7.5
10 to 14 minutes	1,520	12.0	897	8.8	2,417	10.8	12.2
15 to 19 minutes	1,450	11.4	1,160	11.4	2,610	11.7	15.0
20 to 24 minutes	1,024	8.1	1,243	12.2	2,267	10.1	14.3
25 to 29 minutes	1,044	8.2	668	6.5	1,712	7.7	6.3
30 to 34 minutes	2,209	17.4	1,586	15.6	3,795	17.0	15.0
35 to 39 minutes	721	5.7	401	3.9	1,122	5.0	2.9
40 to 44 minutes	483	3.8	460	4.5	943	4.2	4.3
45 to 59 minutes	814	6.4	525	5.1	1,339	6.0	8.6
60 to 89 minutes	150	1.2	87	0.9	237	1.1	7.9
90 or more minutes	233	1.8	149	1.5	382	1.7	4.0
Total:	10,648	83.8	8,005	78.5	18,653	83.5	

Source: 2022 5-year American Community Survey, Summary File

Figure 79: Percent of Employed Population With Commutes of More than 30 Minutes

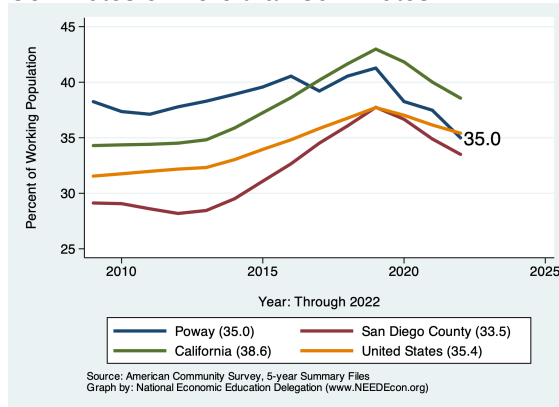


Figure 80: Percent of Employed Population With Commutes of More than 90 Minutes

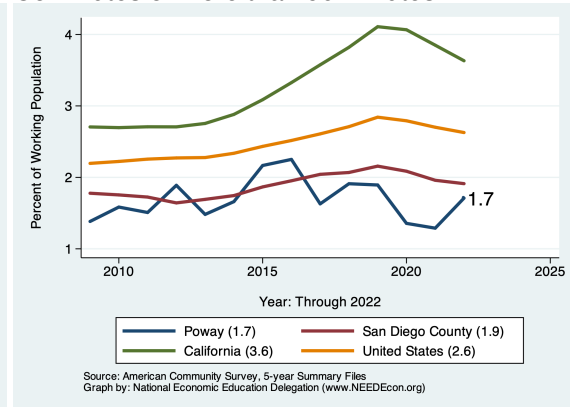
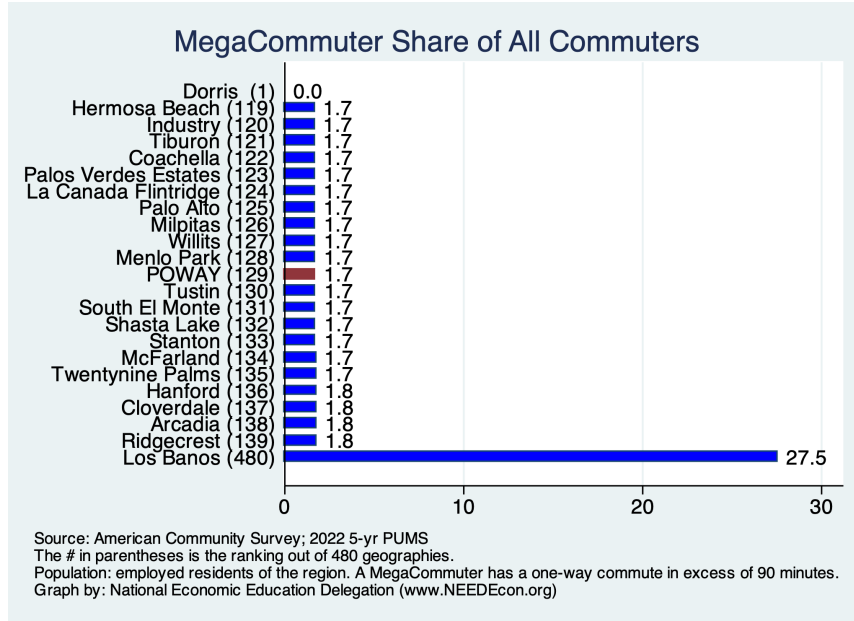


Figure 81: Rank: Share of MegaCommuters Across Similar Geographies



Commute Times for Those Employed in the City

Table 9. SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Less than 5 minutes	201	1.1	234	1.7	435	1.3	2.0
5 to 9 minutes	1,094	5.8	848	6.1	1,942	6.0	7.5
10 to 14 minutes	1,632	8.6	1,248	8.9	2,880	8.8	12.2
15 to 19 minutes	2,352	12.4	2,008	14.4	4,360	13.4	15.0
20 to 24 minutes	2,498	13.2	1,941	13.9	4,439	13.6	14.3
25 to 29 minutes	1,882	9.9	972	7.0	2,854	8.7	6.3
30 to 34 minutes	3,018	15.9	1,844	13.2	4,862	14.9	15.0
35 to 39 minutes	832	4.4	576	4.1	1,408	4.3	2.9
40 to 44 minutes	1,011	5.3	828	5.9	1,839	5.6	4.3
45 to 59 minutes	1,910	10.1	1,189	8.5	3,099	9.5	8.6
60 to 89 minutes	1,145	6.0	418	3.0	1,563	4.8	7.9
90 or more minutes	689	3.6	222	1.6	911	2.8	4.0
Total:	18,264	96.3	12,328	88.4	30,592	93.8	

Source: 2022 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Figure 82: Percent of Local Employees With Commutes of More than 30 Minutes

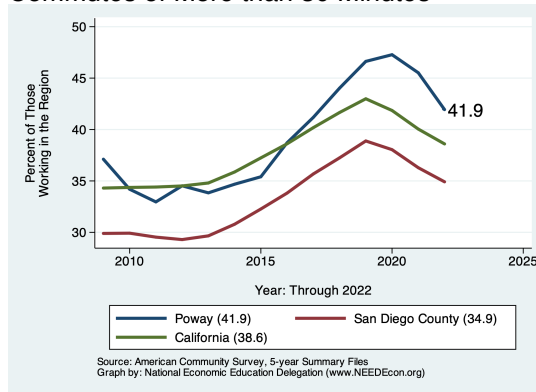


Figure 83: Percent of Local Employees With Commutes of More than 90 Minutes

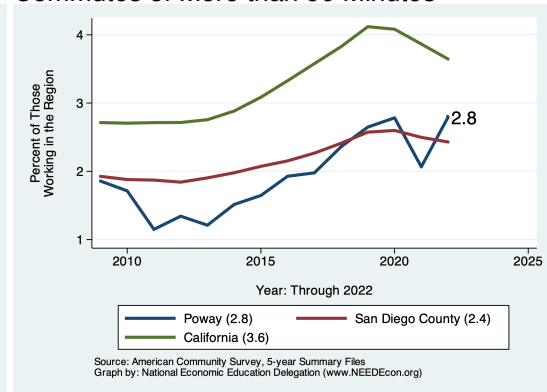
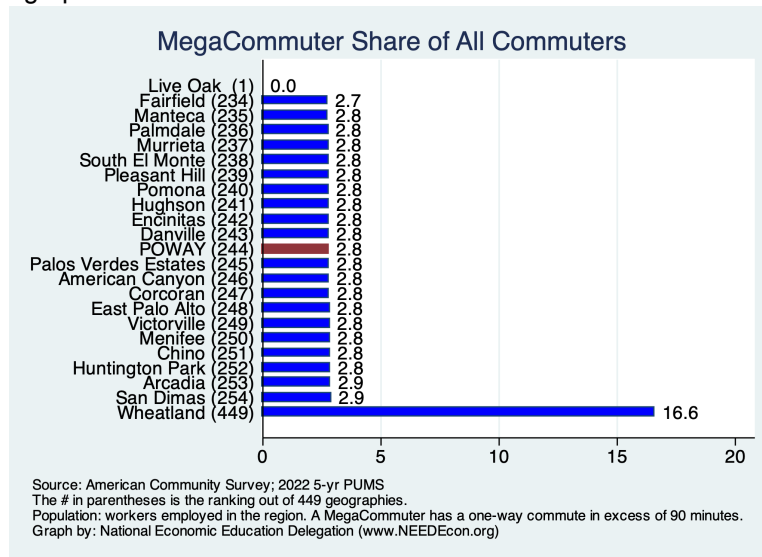


Figure 84: Rank: Share of MegaCommuters Across Similar Geographies



Place of Work

This section provides evidence on where workers living in Poway work. As evidenced in the first table, some of Poway’s employed workers work in the City, but many do not. The first table and graph pair provide evidence at the county level while the second provide evidence with regard to working outside of the Poway city boundary.

Table 10. SEX OF WORKERS BY PLACE OF WORK—STATE AND COUNTY LEVEL

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Worked in state of residence:	12,713	95.7	9,868	89.2	22,581	95.7	99.6
Worked in county of residence	12,531	94.3	9,741	88.1	22,272	94.4	84.1
worked outside of county of residence	182	1.4	127	1.1	309	1.3	15.4
Worked outside state of residence	66	0.5	0	0.0	66	0.3	0.4
Total:	12,779	96.2	9,868	89.2	22,647	96.0	

Source: 2022 5-year American Community Survey, Summary File

Figure 85: Percent of Workers Employed Outside of Their County of Residence

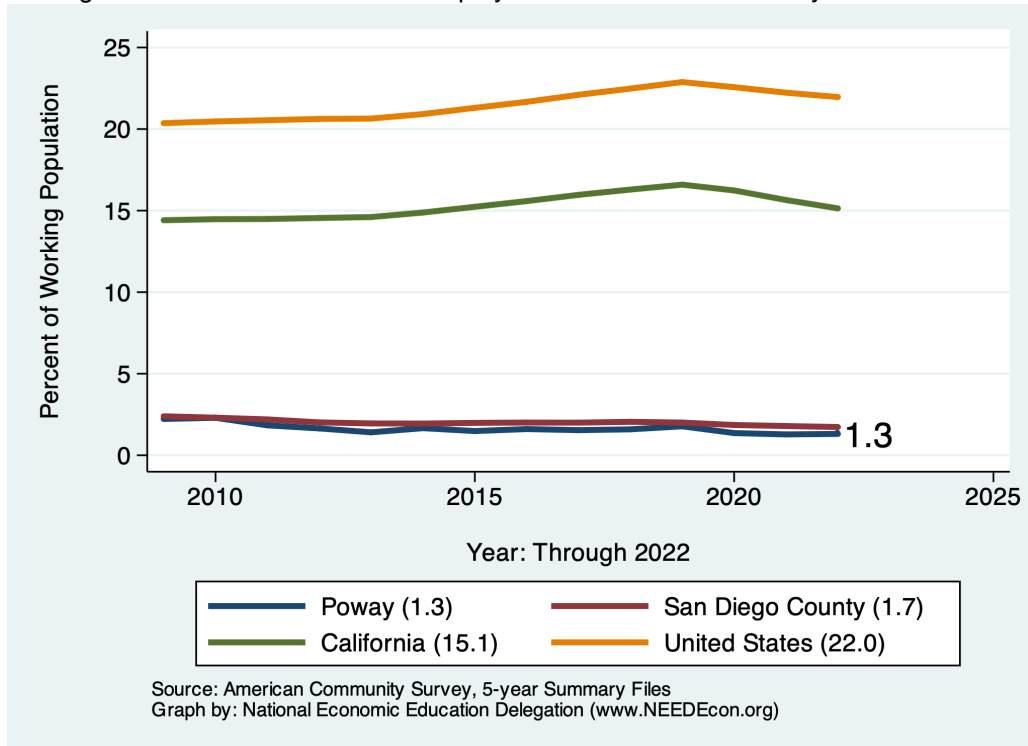
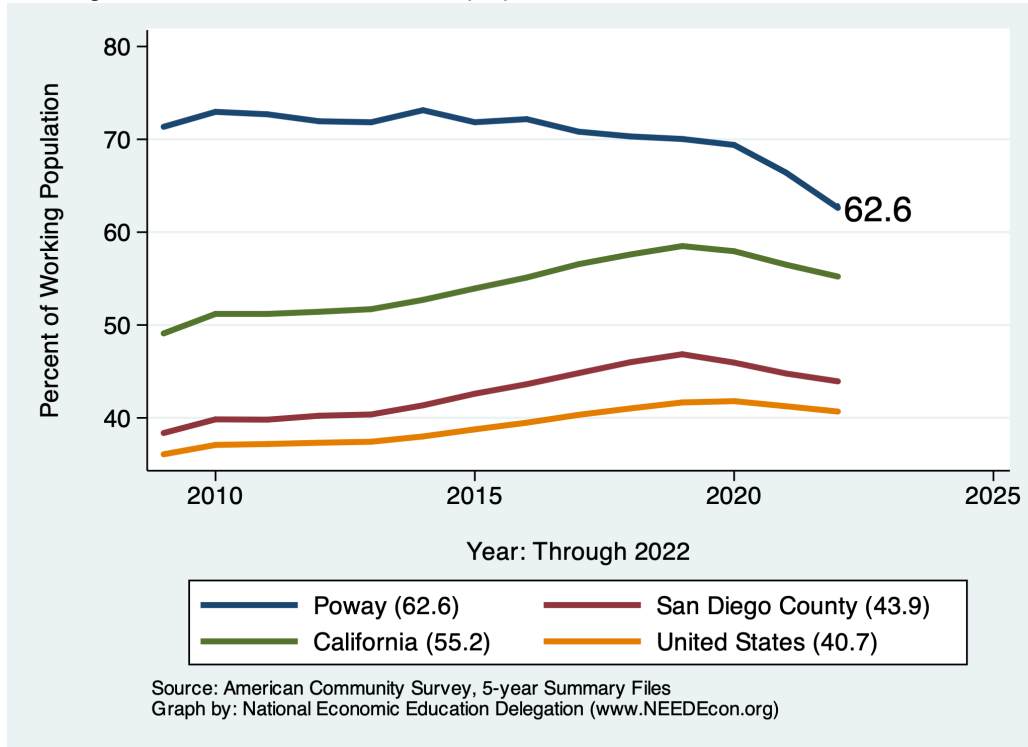


Table 11. SEX OF WORKERS BY PLACE OF WORK-PLACE LEVEL

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Living in a place:	12,779	96.2	9,868	89.2	22,647	96.0	95.9
Worked in place of residence	4,283	32.2	3,591	32.5	7,874	33.4	39.5
Worked outside place of residence	8,496	63.9	6,277	56.7	14,773	62.6	56.4
Not living in a place	0	0.0	0	0.0	0	0.0	4.1
Total:	12,779	96.2	9,868	89.2	22,647	96.0	

Source: 2022 5-year American Community Survey, Summary File

Figure 86: Percent of Workers Employed Outside of Their Place of Residence



Commute Mode by Income

**Table 12. MEDIAN EARNINGS IN THE PAST 12 MONTHS
BY MEANS OF TRANSPORTATION TO WORK**

	City	California	Ratio	United States	
	Median	Median		Median	Ratio
Car, truck, or van - drove alone	63,681	48,566	96.3	46,171	95.8
Car, truck, or van - carpooled	52,609	36,463	106.0	34,487	106.0
Public transportation (excluding taxicab)	52,222	40,179	95.5	45,100	80.4
Walked		29,366		27,142	
Taxicab, motorcycle, bicycle, or other means	115,553	40,433	209.9	36,140	222.1
Worked from home	85,630	75,153	83.7	67,180	88.5
Total:	66,358	48,747	136.1	46,099	143.9

Source: 2022 5-year American Community Survey, Summary File

Notes: 1) Ratio = the ratio of the regional median to either the CA or US median, relative to the Total ratio.

Values above 100 imply a high local median. Values below 100 imply a low local median.

For example, a value of 200 means that the local mean is 2x higher than would be expected.

For "Total:", ratio is simply the ratio of the medians.

2) For regions with more than one geography, the medians are averages weighted by working population.

Table 13. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	3,346	46.7	4,433	60.2	6,839	66.7	15,789	66.9	68.4
Car, Truck, or Van: Carpooled	461	6.4	468	6.4	669	6.5	1,808	7.7	9.5
Public Transportation (excl Taxi)	39	0.5	77	1.0	58	0.6	174	0.7	3.6
Walked	108	1.5	52	0.7	148	1.4	320	1.4	2.4
Taxicab, Motorcycle, or other	146	2.0	76	1.0	330	3.2	558	2.4	2.4
Worked at Home	477	6.7	1,156	15.7	2,208	21.5	3,994	16.9	13.6
Total:	4,577	63.8	6,262	85.1	10,252		22,643	96.0	100.0

Source: 2022 5-year American Community Survey, Summary File

**Table 14. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS FOR
WORKPLACE GEOGRAPHY**

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	4,464	48.1	9,638	77.1	9,185	75.1	26,223	75.1	68.5
Car, Truck, or Van: Carpooled	946	10.2	1,144	9.2	516	4.2	3,274	9.4	9.5
Public Transportation (excl Taxi)	77	0.8	5	0.0	17	0.1	99	0.3	3.6
Walked	174	1.9	61	0.5	132	1.1	483	1.4	2.4
Taxicab, Motorcycle, or other	83	0.9	227	1.8	172	1.4	513	1.5	2.4
Worked at Home	477	5.1	1,156	9.2	2,208	18.1	3,994	11.4	13.6
Total:	6,221	67.1	12,231	97.9	12,230		34,586	99.1	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Mode by Poverty Status

Table 15. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	316	36.5	420	37.3	15,057	66.8	15,793	66.9	68.7
Car, Truck, or Van: Carpooled	77	8.9	39	3.5	1,692	7.5	1,808	7.7	9.5
Public Transportation (excl Taxi)	4	0.5	0	0.0	170	0.8	174	0.7	3.6
Walked	0	0.0	0	0.0	320	1.4	320	1.4	2.1
Taxicab, Motorcycle, or other	3	0.3	0	0.0	555	2.5	558	2.4	2.4
Worked at Home	49	5.7	41	3.6	3,904	17.3	3,994	16.9	13.6
Total:	449	51.8	500	44.4	21,698	96.2	22,647	96.0	

Source: 2022 5-year American Community Survey, Summary File

Table 16. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS FOR WORKPLACE GEOGRAPHY

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	858	55.0	914	50.2	24,451	75.7	26,223	75.1	68.7
Car, Truck, or Van: Carpooled	175	11.2	168	9.2	2,931	9.1	3,274	9.4	9.5
Public Transportation (excl Taxi)	0	0.0	0	0.0	99	0.3	99	0.3	3.6
Walked	34	2.2	0	0.0	449	1.4	483	1.4	2.1
Taxicab, Motorcycle, or other	10	0.6	55	3.0	448	1.4	513	1.5	2.4
Worked at Home	49	3.1	41	2.3	3,904	12.1	3,994	11.4	13.6
Total:	1,126	72.1	1,178	64.7	32,282		34,586	99.1	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Migration

Overall Migration Flows

Definition:

The United States is a country with an increasingly mobile population. People move, migrate, from one place to another with increasing frequency.

Why is it important?

Having a handle on whether or not Poway is a net recipient (migration inflows) or donor (mi-

gration outflows) of population is very important for understanding trends in the City's development. This section outlines migration patterns by age, education, income, marital status, and housing tenure. Understanding recent trends is very important for making policy, investment, and other decisions about the future. Also, understanding the extent to which the population is stable, or experiences significant turnover each year is helpful for planning purposes.

Figure 87: Overall Movements of Residents

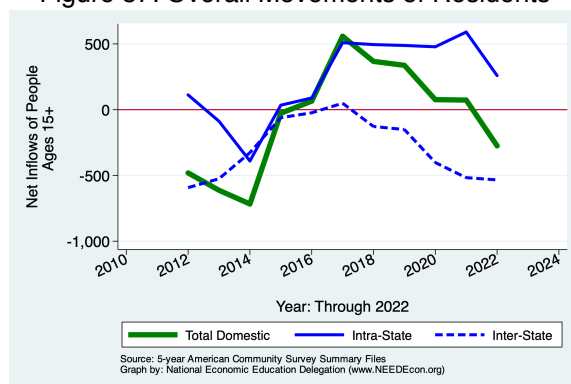


Table 17: Migration by Income

Category	Population	Net Inflows				
		All Migration	Same State			From Abroad
			W/in County	Between Counties	Across States	
No income	5,100	67	58	37	-168	140
With income	34,368	-145	285	-121	-366	57
\$1 to \$9,999 or less	4,462	-121	25	-113	-83	50
\$10,000 to \$14,999	2,323	-74	56	-67	-63	0
\$15,000 to \$24,999	3,407	-51	-18	-27	-13	7
\$25,000 to \$34,999	2,389	-39	-43	8	-4	0
\$35,000 to \$49,999	3,746	199	161	14	24	0
\$50,000 to \$64,999	3,355	145	64	76	5	0
\$65,000 to \$74,999	1,612	0	29	-10	-19	0
\$75,000 or more	13,074	-204	11	-2	-213	0
All:	39,468	-78	343	-84	-534	197

Source: 2022 5-year American Community Survey, Summary File

Note: The data in this and other tables in this section are limited in that there is no information on the City's population that has moved abroad.

The "From Abroad" column is gross movements into the City from abroad.

Figure 88: Overall Movements of Low Income Residents

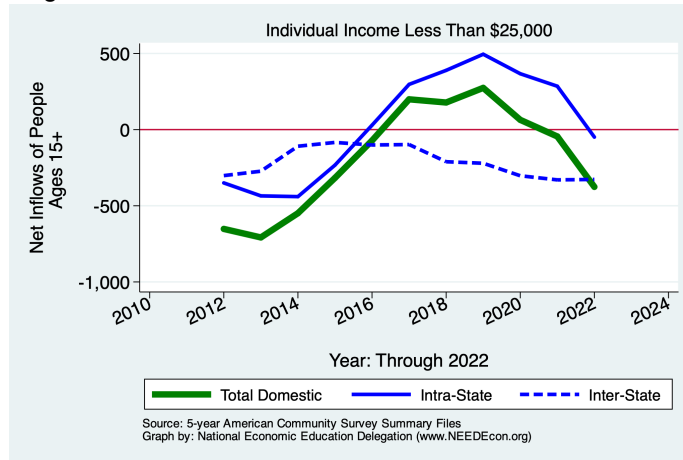


Figure 89: Overall Movements of Middle Income Residents

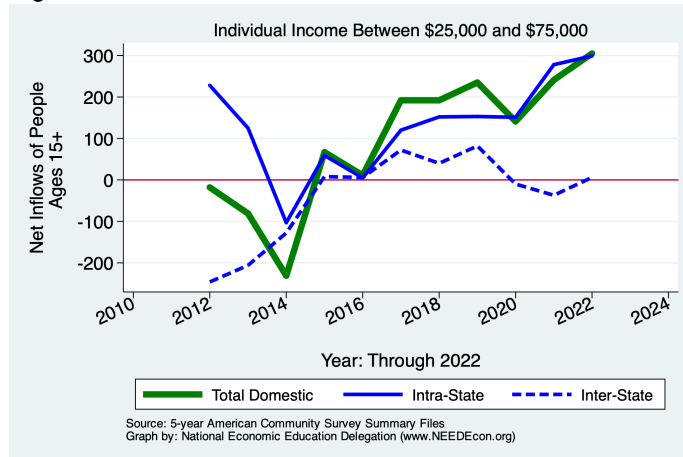
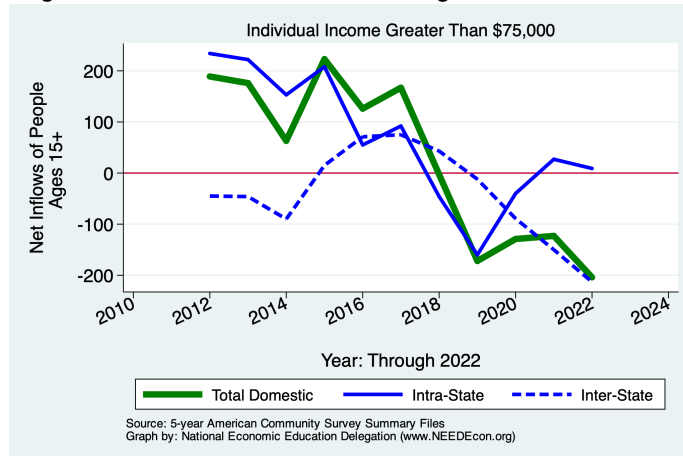


Figure 90: Overall Movements of High Income Residents



Demographics of Migration Flows

Table 18: Migration by Marital Status

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
Never married	10,906	-323	-78	-56	-258	69
Now married, except separated	23,017	563	536	68	-169	128
Divorced	3,177	-200	-70	-58	-72	0
Separated	529	-103	-73	0	-30	0
Widowed	1,839	-15	28	-38	-5	0
Total:	39,468	-78	343	-84	-534	197

Source: 2022 5-year American Community Survey, Summary File

Table 19: Migration by Tenure

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
Householder lived in owner-occupied housing units	36,024	569	672	74	-306	129
Householder lived in renter-occupied housing units	11,492	-473	-264	-65	-212	68
Total:	47,516	96	408	9	-518	197

Source: 2022 5-year American Community Survey, Summary File

Figure 91: Domestic Movements of Residents by Tenure

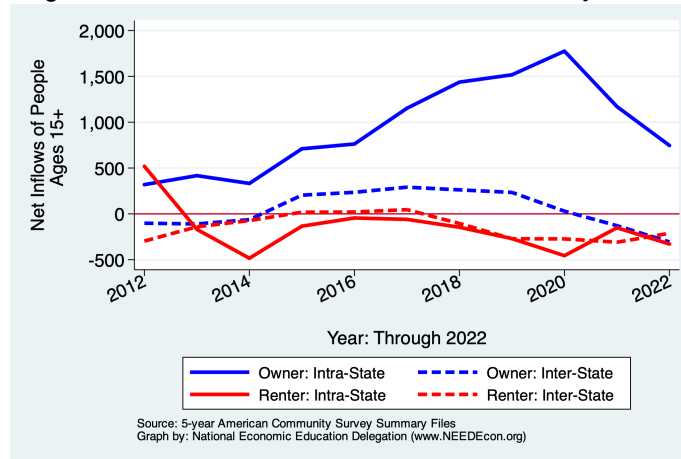


Table 20: Migration by Age

Category	Population	Net Inflows					
		All Migration	Same State			Across States	From Abroad
			W/in County	Between Counties	Between Counties		
1 to 4 years	2,296	77	59	49	-31	0	
5 to 17 years	8,009	-83	-1	-31	-51	0	
18 and 19 years	1,237	-328	-62	-122	-144	0	
20 to 24 years	2,080	-109	-38	3	-92	18	
25 to 29 years	2,448	271	208	-38	44	57	
30 to 34 years	3,382	202	-69	93	68	110	
35 to 39 years	3,268	161	177	68	-84	0	
40 to 44 years	3,151	-58	-33	-12	-13	0	
45 to 49 years	2,888	-35	53	13	-113	12	
50 to 54 years	3,265	15	22	14	-21	0	
55 to 59 years	3,384	-166	-82	-56	-28	0	
60 to 64 years	3,441	-39	56	-24	-71	0	
65 to 69 years	2,994	-40	30	-21	-49	0	
70 to 74 years	2,568	3	17	-14	0	0	
75 years and over	3,810	70	77	0	-7	0	
Total Population:	48,221	-59	414	-78	-592	197	

Source: 2022 5-year American Community Survey, Summary File

Table 21: Migration by Educational Attainment

Category	Population	Net Inflows					
		All Migration	Same State			Across States	From Abroad
			W/in County	Between Counties	Between Counties		
Less than high school graduate	2,596	213	113	-16	6	110	
High school graduate (includes equiv)	4,211	41	127	-3	-83	0	
Some college or assoc. degree	9,297	106	127	-5	-16	0	
Bachelor's degree	10,941	76	91	-92	20	57	
Graduate or professional degree	7,554	-52	-2	139	-201	12	
Total:	34,599	384	456	23	-274	179	

Source: 2022 5-year American Community Survey, Summary File

Table 22: Median Income of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	54,608	54,608
Moved Within Same County	48,170	49,425
Moved to Different County, Same State	54,200	17,315
Moved Between States	60,122	58,291
Total Population:	53,580	53,711

Source: 2022 5-year American Community Survey, Summary File

Table 23: Median Age of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	44.0	44.0
Moved Within Same County	33.5	32.2
Moved to Different County, Same State	32.8	26.1
Moved Between States	32.8	34.8
Moved from Abroad	30.2	
Total Population:	42.1	42.2

Source: 2022 5-year American Community Survey, Summary File

References and Sources

The majority of the data presented in this report are from the American Community Survey (ACS). For larger geographies, the 1-year Summary Files provide the data. For smaller communities, roughly those with less than 65,000 in population in 2021, the 5-year Summary Files provide the data.

The ACS data are supplemented by building permit data from the U.S. Census Bureau, population and housing data from the California Department of Finance, and home price and rental rates from Zillow.

U.S. Census Bureau. American Community Survey 1-year and 5-year Summary Files. <https://www.census.gov/programs-surveys/acs/data/data-via-ftp.html>. The 1-year data are released in September each year and the 5-year data are released in January.

Zillow Research Data <https://www.zillow.com/research/data/>

U.S. Census Bureau. Building Permits Data, updated annually in February. <https://www.census.gov/construction/bps/current.html>

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