Southern California Wine Country | Economic Development Coalition

August 2026

2026
Outbound Labor Analysis

Southern California Wine Country Commuting Patterns to San Diego and Los Angeles Metro Areas

Focus Industries:
Aerospace - Advanced Manufacturing - Life Sciences - Clean Technology

Next Move Group
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1. Executive Summary

This report quantifies outbound commuting from the five-city Temecula Valley (Temecula, Murrieta, Wildomar, Lake Elsinore, and Menifee) with particular focus on skilled occupations supporting aerospace, advanced manufacturing, life sciences, and clean technology industries concentrated in San Diego and Los Angeles counties.

The Temecula Valley functions as a major bedroom community for Southern California's coastal innovation and manufacturing corridors. High housing costs in San Diego and Los Angeles, combined with relatively more affordable housing and quality of life in Southwest Riverside County, drive significant daily and hybrid commuting along the I-15 corridor.

Key Findings

- Combined employed residents across the five cities: **~200,800**.
- Approximately **84%** of these workers are employed outside their home city (≈168,700).
- A substantial share of "outside city" commuting is intra-Valley; true coastal (San Diego + LA/Orange) physical commuting is estimated in the 25,000–40,000+ range overall.
- Target-sector occupations account for an estimated **~10,080** outbound workers from the Valley.
- Destination split: roughly **60–70% San Diego County** and **30–40% Los Angeles / Orange County**, varying by industry.
- Average annual wages (mean of San Diego and Los Angeles) range from ~$51k for production roles to $203k for engineering managers.

These patterns create both opportunities and challenges for local economic development: a large, skilled resident workforce already connected to high-value coastal industries, yet limited local capture of those jobs and long average commute times.

2. Geographic and Labor Force Context

The five cities form a contiguous corridor along and near I-15 in Southwest Riverside County. Temecula and Murrieta have the largest employment bases and somewhat stronger local job markets; Lake Elsinore and Menifee show the highest rates of out-commuting and longer average travel times. Menifee stands out with 12.2% of its workforce reporting super-commutes exceeding 90 minutes.

Table 1. Employed Residents and Outbound Commuting by City

City	Employed Residents	% Outside City	Est. Outbound	Avg Commute (min)
Temecula	52,322	77%	40,288	36.3
Murrieta	50,717	85%	43,109	~38
Menifee	46,981	87%	40,873	41.5
Lake Elsinore	33,973	95%	32,274	~40
Wildomar	16,825	86%	14,470	38.4
TOTAL	200,818	~84%	171,014	~39

Source: ACS / local labor market estimates; WRCOG Resident & Worker Tabulations.

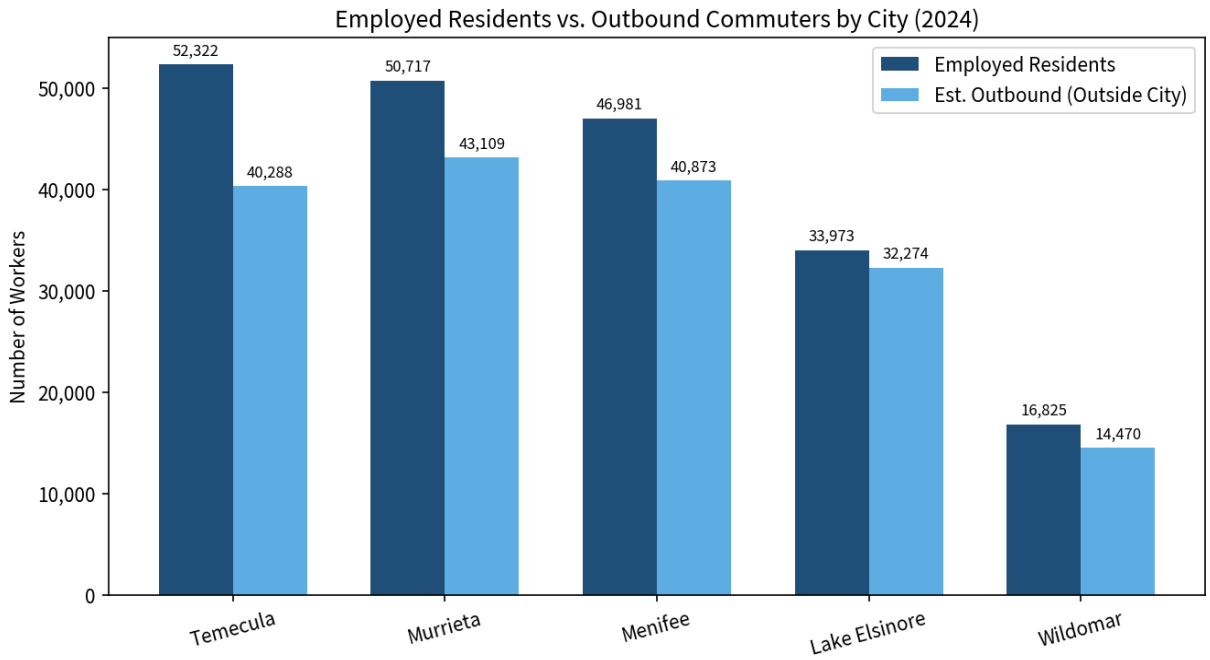

Figure 1. Employed Residents vs. Estimated Outbound Commuters by City

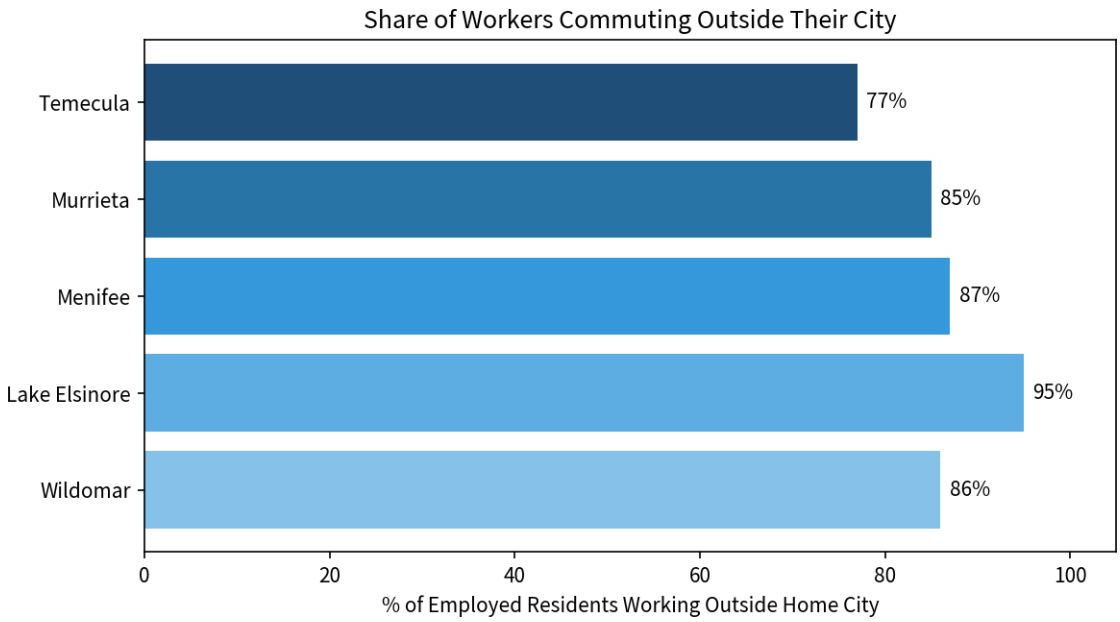

Figure 2. Percentage of Employed Residents Working Outside Their Home City

Important caveat: The “outside city” figures include substantial intra-Valley commuting. True out-of-area flows to San Diego and Los Angeles counties are a smaller but still significant subset of the total.

3. Target Industry Focus

The analysis concentrates on four industry clusters that draw skilled workers from the Temecula Valley to coastal job centers. Section 4 organizes the available outbound labor by these industries so that companies in each sector can quickly identify the relevant talent pool.

Aerospace & Defense — Strong presence in San Diego and broader Southern California supply chains.

Advanced Manufacturing — Precision components, electronics assembly, CNC machining, and production support.

Clean Technology — Overlaps with advanced manufacturing and electronics; energy systems and materials roles.

Life Sciences / Biotech — San Diego ranks among the top U.S. life-sciences clusters.

4. Available Outbound Labor by Target Industry

Occupations are grouped by the industry they most directly support. Some roles (especially engineers, managers, software developers, and certain trades) appear in more than one industry because they serve multiple sectors. Outbound counts are midpoint estimates; wages are the average of San Diego and Los Angeles figures. Overall destination patterns are discussed in Section 5.

4.1 Aerospace & Defense

San Diego has a substantial aerospace and defense cluster. Temecula Valley residents already working in these roles represent a ready talent pipeline for firms expanding or locating in the region.

Occupation	Est. Outbound	Avg Annual Wage
Aerospace Engineers	600	$157,400
Aerospace Eng. Technologists/Technicians	375	$100,600
Computer Hardware Engineers	225	$176,200
Electronics Engineers (exc. Computer)	350	$156,700
Electrical Engineers	425	$142,600

Mechanical Engineers	700	$127,850
Engineering Managers	225	$203,300
Welders, Cutters, Solderers, Brazers	700	$64,200
Team Assemblers	850	$51,250
Electrical/Electronic Assemblers	350	$52,500
Machinists	425	$62,250
CNC Tool Operators	300	$58,100
CNC Tool Programmers	115	$87,300
Electrical & Electronics Repairers	150	$88,900
Software Developers	600	$167,400

Table 2. Aerospace & Defense – Estimated Outbound Labor from Temecula Valley

4.2 Advanced Manufacturing

Advanced manufacturing roles support aerospace, medical devices, electronics, and industrial production. These occupations form the core production and process-engineering talent base commuting from the Valley.

Occupation	Est. Outbound	Avg Annual Wage
Mechanical Engineers	700	$127,850
Industrial Engineers	500	$124,400
Electrical Engineers	425	$142,600
Electronics Engineers (exc. Computer)	350	$156,700
Industrial Production Managers	215	$146,150
Engineering Managers	225	$203,300
First-Line Supervisors of Production	275	$83,500
Welders, Cutters, Solderers, Brazers	700	$64,200
Team Assemblers	850	$51,250
Machinists	425	$62,250
Electrical/Electronic Assemblers	350	$52,500
CNC Tool Operators	300	$58,100
CNC Tool Programmers	115	$87,300
Industrial Machinery Mechanics	225	$75,050
Electrical & Electronics Repairers	150	$88,900
Mechanical Eng. Technologists/Technicians	215	$85,950
Mechanical Drafters	115	$90,800
Electricians	300	$84,600
Software Developers	600	$167,400

Table 3. Advanced Manufacturing – Estimated Outbound Labor from Temecula Valley

4.3 Clean Technology

Clean technology draws on many of the same engineering, technician, and production skills as advanced manufacturing, with additional emphasis on materials, electrical systems, and energy-related roles.

Occupation	Est. Outbound	Avg Annual Wage
Electrical Engineers	425	$142,600
Electronics Engineers (exc. Computer)	350	$156,700
Mechanical Engineers	700	$127,850
Chemists	225	$103,150
Materials-related / Chemical Technicians	215	$64,000
Engineering Managers	225	$203,300
Industrial Engineers	500	$124,400
Electrical & Electronics Repairers	150	$88,900
Electricians	300	$84,600
CNC Tool Operators	300	$58,100

CNC Tool Programmers	115	$87,300
Software Developers	600	$167,400

Table 4. Clean Technology – Estimated Outbound Labor from Temecula Valley

4.4 Life Sciences / Biotech

San Diego is one of the strongest life-sciences markets in the United States. Temecula Valley residents already working in biomedical engineering, laboratory, and related scientific roles form a high-value commuting talent pool with a clear San Diego destination preference.

Occupation	Est. Outbound	Avg Annual Wage
Bioengineers & Biomedical Engineers	450	$132,550
Biochemists & Biophysicists	225	$137,100
Chemists	225	$103,150
Biological Technicians	300	$72,250
Chemical Technicians	215	$64,000
Medical/Clinical Lab Technologists	215	$76,800
Medical/Clinical Lab Technicians	215	$76,800
Software Developers	600	$167,400
Engineering Managers	225	$203,300

Table 5. Life Sciences / Biotech – Estimated Outbound Labor from Temecula Valley

Note: Some occupations appear under multiple industries because they support more than one sector. The combined unique outbound estimate across all target occupations remains approximately **10,080**.

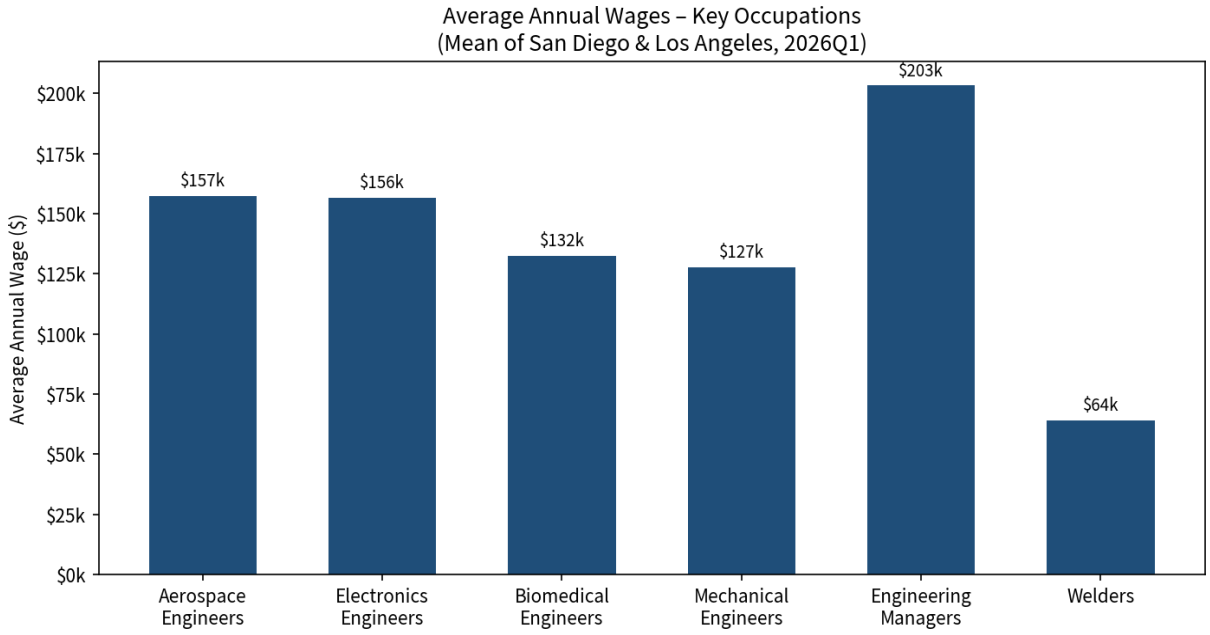

Figure 3. Average Annual Wage – Selected Key Occupations (Mean of San Diego & Los Angeles)

5. Destination Patterns: San Diego vs. Los Angeles

San Diego County is the stronger single destination for Temecula Valley residents in the target sectors, driven by the region's dense life-sciences cluster, significant aerospace/defense presence, and the relatively direct I-15 corridor. Los Angeles County draws workers especially for certain advanced manufacturing and supply-chain roles.

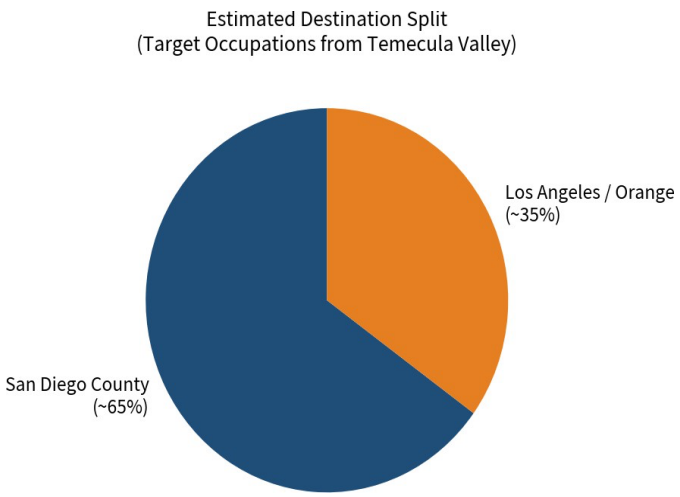

Figure 4. Estimated Destination Split for Target Occupations from the Temecula Valley

Life-sciences roles show the clearest San Diego preference. Aerospace engineering and technician roles also lean towards San Diego. Production trades and certain electronics/mechanical roles are more balanced between San Diego and Los Angeles counties.

6. Implications for Economic Development

The scale of outbound skilled commuting represents both a latent workforce asset and a retention challenge for the Temecula Valley.

Opportunities

- A large, experienced talent pool already working in high-value coastal industries is available for local attraction or expansion of aerospace, medical-device, advanced manufacturing, and clean-tech employers.
- Wage differentials and housing-cost advantages can be marketed to firms seeking lower-cost locations while retaining access to the broader Southern California ecosystem.
- The 10,080 outbound commuters represent a ready made pool of experienced, skilled talent that local employers can recruit, providing access to workers already trained in high value industries.
- Employers can benefit from recruiting this workforce at a more competitive labor cost than in Los Angelos or San Diego while offering employees the opportunity to work closer to home, improving retention and quality of life.

Challenges

- Infrastructure pressure on I-15 continues to grow with population and employment in the corridor.

Targeted business attraction focused on the four industry clusters, combined with workforce development aligned to the occupations listed by industry in Section 4, offers the highest probability of converting outbound commuting into local employment growth.

7. Data Sources and Methodology Notes

- **Employed residents**: American Community Survey and local labor market estimates for each of the five cities.
- **Percent working outside city**: Western Riverside Council of Governments / City of Temecula Resident and Worker Tabulations and Commute Patterns.
- **Wages**: Current occupation wage data for San Diego County and Los Angeles County. The single wage shown is the simple average of the two county means.
- **Outbound volume estimates**: Midpoint estimates scaled from the combined employment base of the five cities and known industry location patterns. These are informed estimates, not direct OnTheMap extracts.
- **Industry grouping**: Occupations are assigned to the industry (or industries) they most commonly support so that sector-specific employers can quickly identify relevant talent.

For precise origin-destination counts by SOC or NAICS, a custom OnTheMap (LEHD) analysis selecting the five cities as residence geography and filtering to relevant industry and occupation codes is recommended.

This report is intended for economic development planning and workforce strategy use. Estimates should be refined with primary data collection or custom LEHD extracts as needed for investment or site-selection decisions.