

2019-20 ORANGE COUNTY COMMUNITY INDICATORS



Tracking Orange County's economy, health, education, workforce, housing, and more.

BROUGHT TO YOU BY



TABLE OF CONTENTS

ORANGE COUNTY PROFILE	5	HEALTH	
2020 CENSUS	26	Health care access.....	89
ECONOMY		Health & fitness	92
Employment	38	Chronic disease.....	95
High-tech diversity and growth.....	43	Mental health and substance abuse	97
Innovation	46	SAFETY	
International marketplace.....	50	Crime rate.....	100
HOUSING		INFRASTRUCTURE	
Housing landscape	52	Transportation.....	102
Housing affordability	54	Water use and supply	105
Rental affordability	58	GOVERNANCE & CIVIC ENGAGEMENT	
Housing security.....	62	Voter participation.....	109
INCOME		Civic engagement	111
Household income.....	65	Media and information.....	114
Family financial stability	69	ARTS & CULTURE	
EDUCATION		Creative economy	116
Kindergarten readiness	71	Cultural engagement.....	117
Academic performance: literacy	74		
Academic performance: mathematics	76		
High school graduation rate	78		
College and career readiness.....	80		
STEM-related degrees	86		

DEAR COMMUNITY PARTNER,

On behalf of title sponsor Bank of America, along with contributing partners, Orange County Business Council, First 5 Orange County, Orange County United Way, CalOptima and the Orange County Community Foundation, we are pleased to present the *2019-20 Orange County Community Indicators* report.

A good indicator reflects a region's performance, showing whether key areas are improving, worsening or remaining constant. The indicators in this report, released annually since 2000, track a broad range of issues important to the county's long-term health and prosperity, highlighting areas where the county is performing well and making progress as well as those areas where improvement is needed and community efforts could positively influence the future. We also compare Orange County to "peer" counties within California and across the nation based on the many characteristics we have in common.

This report largely reflects Orange County's continued growth and progress. Once a rural community of ranches and orange groves, Orange County has grown into the nation's sixth largest county — a diverse regional, national and international powerhouse, and an economic engine of Southern California. In addition, Orange County residents enjoy a world-renowned quality of life, a thriving economy, low unemployment, world-class educational resources and one of the nation's lowest crime rates.

At the same time, Orange County faces some challenges that require attention. Its lack of affordable workforce housing is a chronic issue that pushes many families farther away from their place of employment, increasing traffic congestion and putting additional pressure on transportation infrastructure. Furthermore, the county's residents are aging faster than the rest of the nation. This is partly due to the county's high cost of living, which prices many younger residents out of the region.

This year's report also includes a special feature on the importance of the 2020 Census, an unprecedented opportunity for Orange County to come together to make sure every resident is accurately counted. A fair and accurate Census is especially important because Orange County stands to lose significant federal funds and political representation if residents are undercounted.

As always, the findings in the report are intended to serve as a starting point for further dialogue and collaboration. We hope you will use the *2019-20 Orange County Community Indicators* report as a thought-provoking resource and guide that sets the stage for regional leaders to work together toward ensuring Orange County's continued upward trajectory. Please share the report with others interested in sustaining our county's long-term health and quality of life.

Sincerely,



Susan B. Parks

Susan B. Parks
President and CEO
Orange County United Way



Lucy Dunn

Lucy Dunn
President and CEO
Orange County
Business Council



Shelley M. Hoss

Shelley M. Hoss
President and CEO
Orange County
Community Foundation



Kimberly Goll

Kimberly Goll
Executive Director
First 5 Orange County



Michael Schrader

Michael Schrader
Chief Executive Officer
Cal Optima

ACKNOWLEDGEMENTS

CONTRIBUTING PARTNERS



ORANGE COUNTY COMMUNITY INDICATORS PROJECT SPONSORS

TITLE SPONSOR



PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS

CHEVRON
SOUTHERN CALIFORNIA EDISON

SUPPORTER SPONSORS

CHOC CHILDREN'S
RANCHO SANTIAGO COMMUNITY
COLLEGE DISTRICT
SOCALGAS/SDG&E

2019-2020 ORANGE COUNTY COMMUNITY INDICATORS TEAM

Dr. Wallace Walrod, OCBC
Benjamin Palmer, OCBC
Catherine Harper, OCBC
Kari Parsons, Parsons Consulting
Lisa Burke, Burke Consulting
Robert Walrod, OCBC

Jennifer Bell, Esri
Kurt Brotcke, Orange County Transportation Authority
Curt Condon, Orange County Health Care Agency
Lauren Duran, Orange County Department of Education
Diane Ehrle, Orange County Department of Education
Charlie Frye, Esri
Georgia Funnell, California Association of Realtors
Charles Harris, Visit Anaheim
Jim Herries, Esri
Kevin Hostert, Municipal Water District of Orange County

REPORT CONTRIBUTORS

Debra Kegel, CalOptima
John Kennedy, Orange County Water District
Sarah Middleton, Mission Up
Tiffany Nevarez, Orange County Registrar of Voters
Bao Nguyen, U.S. Census Bureau
Amber Nowak, County of Orange, Social Services Agency
Anne Olin, Charitable Ventures of Orange County
Saul Viramontes, County of Orange
First 5 Orange County and Orange County Elementary School Districts



ORANGE COUNTY PROFILE

PLACE

799

Square miles (land area)

42

Miles of coastline

4,033

Persons per square mile

34

Cities and several large unincorporated areas

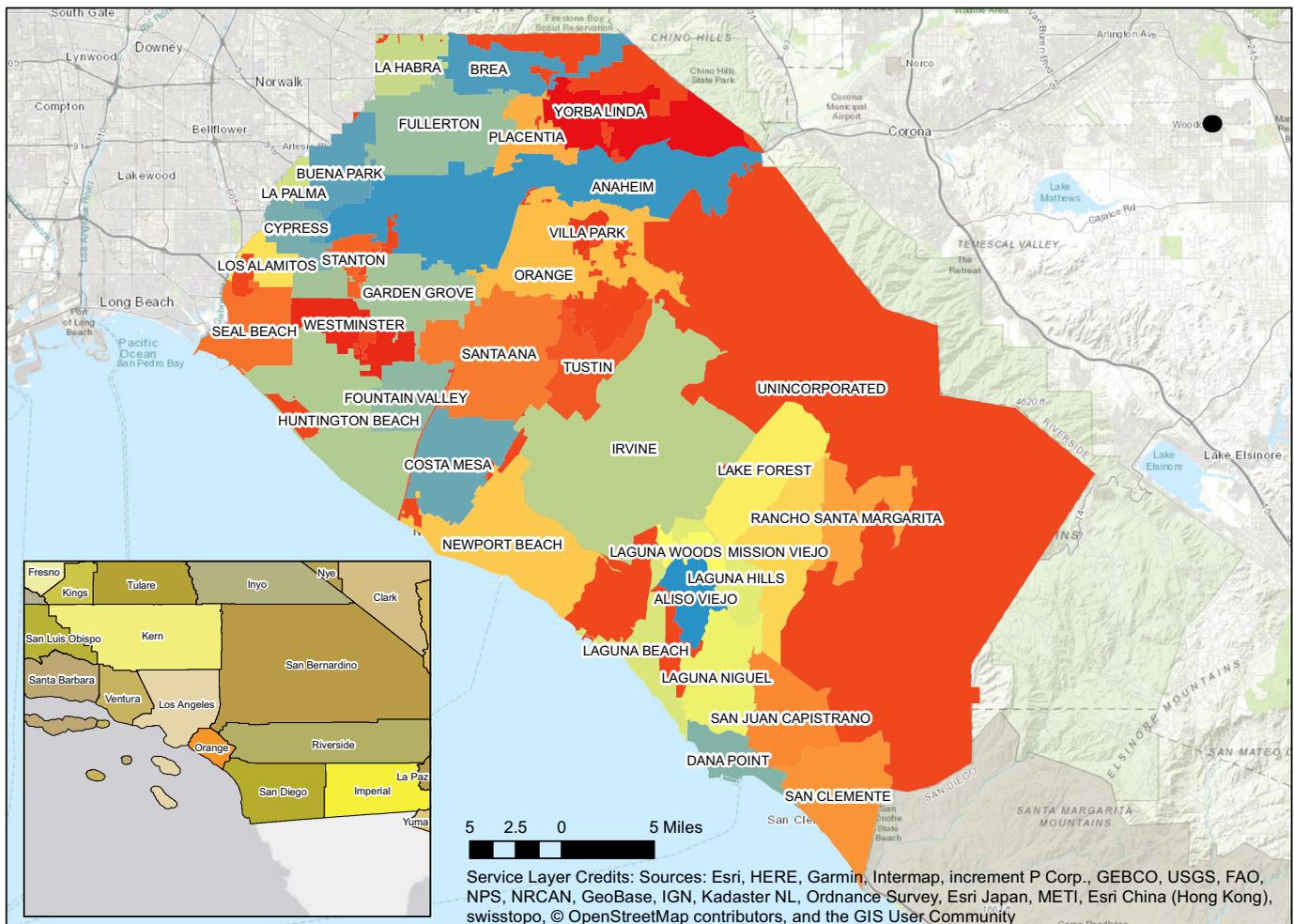
ORANGE COUNTY HAS

8% of California's population but only

0.5% of its land area

Orange County is at the very heart of the Southern California region—one of the largest and most diverse regions in the world, with a notable variety of languages, ethnicities, and cultures represented. The seven-county Southern California region spans over 42,000 square miles, has 209 cities, and is home to over 22 million people — a population figure that, if Southern California was a state, would make it the country's 3rd largest (after California and Texas).

Southern California and Orange County, 2019





ORANGE COUNTY PROFILE

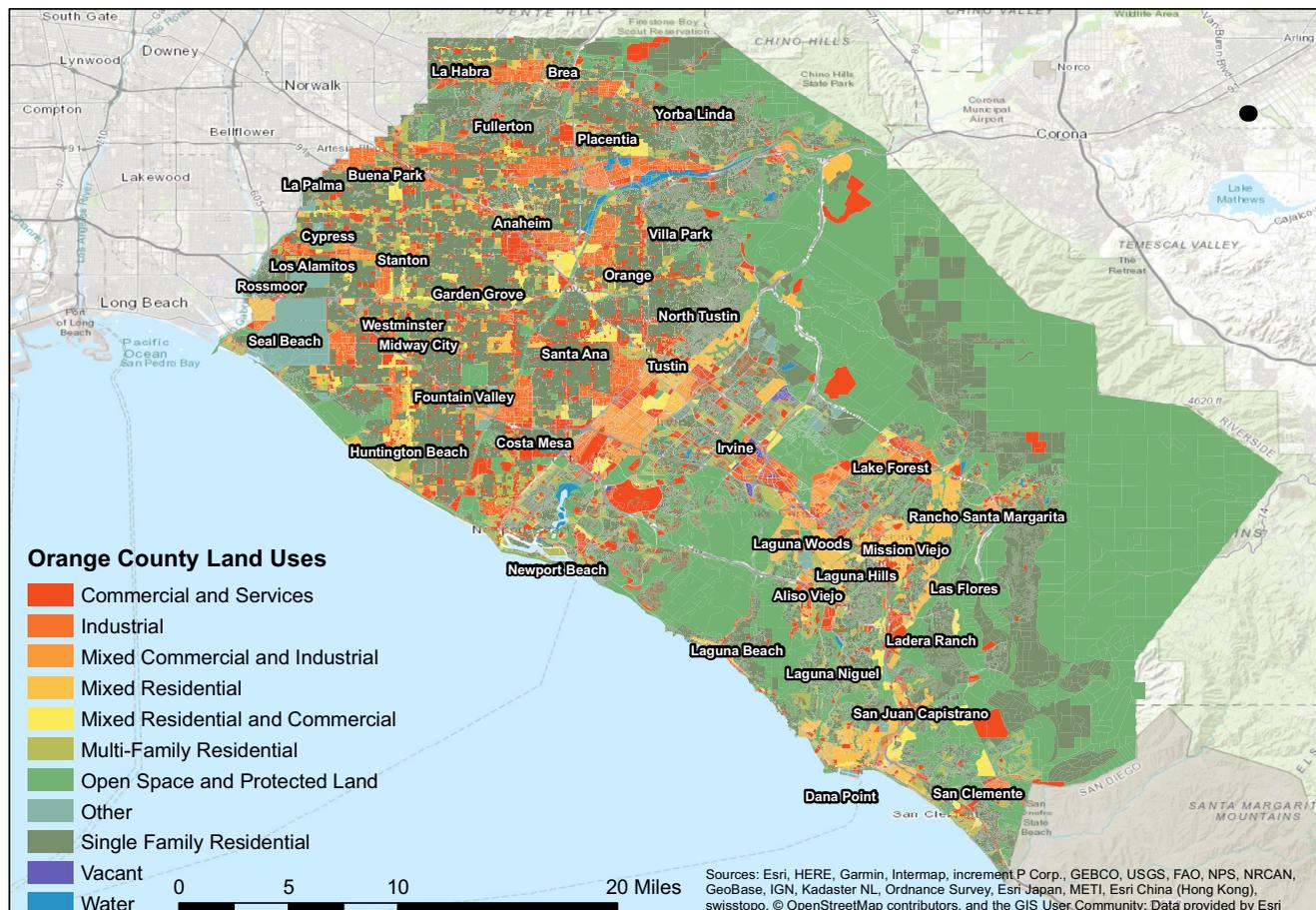
Orange County has grown from a rural home of ranches and orange groves to a regional, national and international powerhouse. The county's economy, fueled by a variety of thriving sectors from Hospitality and Tourism to Biotech and Medical Device Manufacturing, currently employs 1,675,000 workers. It has gained international fame as a world-class place to live and visit due to its quality of life and variety of amenities, from tourist destinations such as Disneyland to 42 miles of coastline, featuring the world's most iconic beaches — Laguna, Newport, and Huntington—plus 39,000 acres in 25 urban and wilderness parks, and plenty of open space for outdoor activities.

POPULATION DENSITY

In 2019, Orange County averaged 4,033 residents per square mile, a 5.9 percent increase from 2010. As seen below, Orange County's population density is significantly higher than any surrounding county and the state average.

County	Population per Square Mile
Orange	4,033
Los Angeles	2,527
Riverside	339
San Bernardino	109
San Diego	797
California (Statewide)	163

Orange County Land Use Map, 2019



PEOPLE | DEMOGRAPHICS | DIVERSITY

3,222,498
Population 2019

3,622,988
Population 2060

12% Percent growth

ORANGE COUNTY - 6TH LARGEST COUNTY IN THE U.S.

In terms of population, Orange County is large and growing. It is the third largest county in California and the sixth largest in the nation. It has more residents than 21 states, including Utah, Iowa, Nevada, Arkansas and Mississippi.

BECOMING OLDER

Orange County's median age has risen steadily over the past several years, from 35.9 in 2007 to 37.9 in 2017. Its 2017 median age was lower than the national average (38.1 years) but higher than the state average (36.5 years).

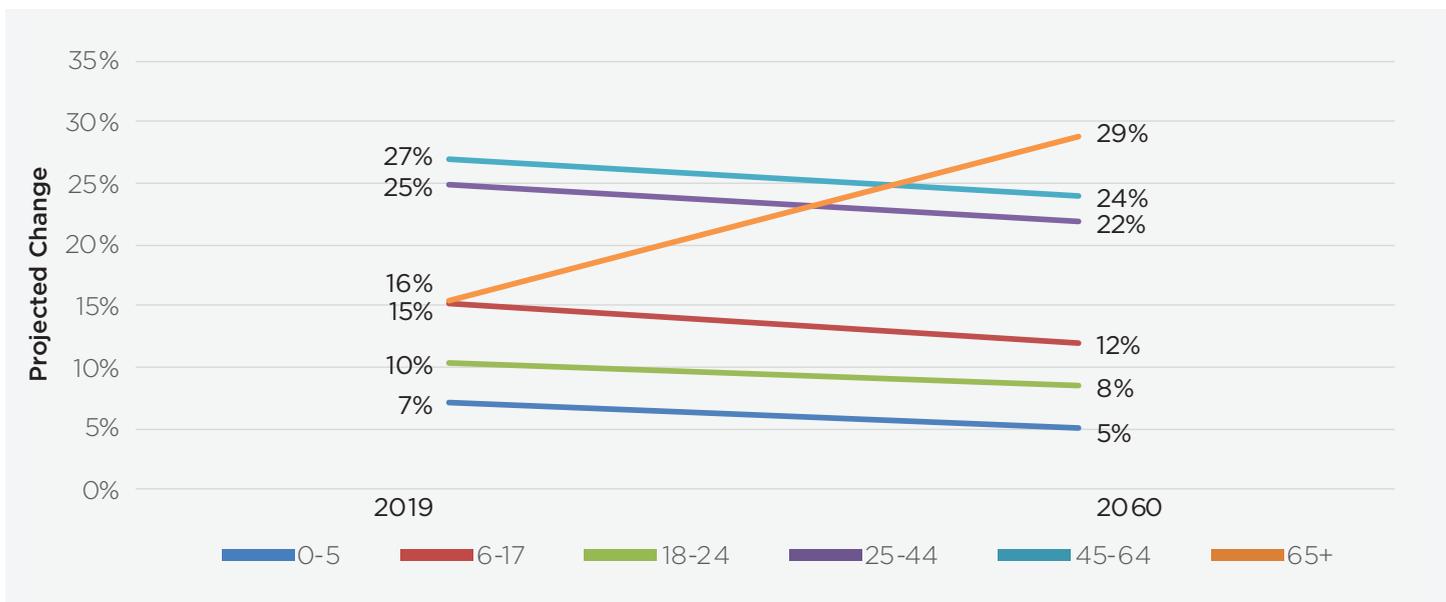
NEW BIRTHS, INTERNATIONAL MIGRATION FUELING GROWTH

Orange County's population growth has averaged 22,954 per year since 2010. Natural increase — births minus deaths — accounted for more than three quarters of this growth, while net foreign immigration has averaged 13,824 annually since 2010. With steady international immigration, Orange County's proportion of foreign-born residents has increased from 6 percent in 1970 to 30 percent in 2017.

OLDER POPULATION SET TO EXPAND

Orange County residents aged 65 and older are the only age group expected to account for a larger percent of the county population in 2060 than in 2019; they will represent an estimated 29 percent of all county residents in 2060.

Projected Change in Age Group Proportions of Total Orange County Population, 2019 and 2060



Source: Projections Prepared by Demographic Research Unit, California Department of Finance, May 2019



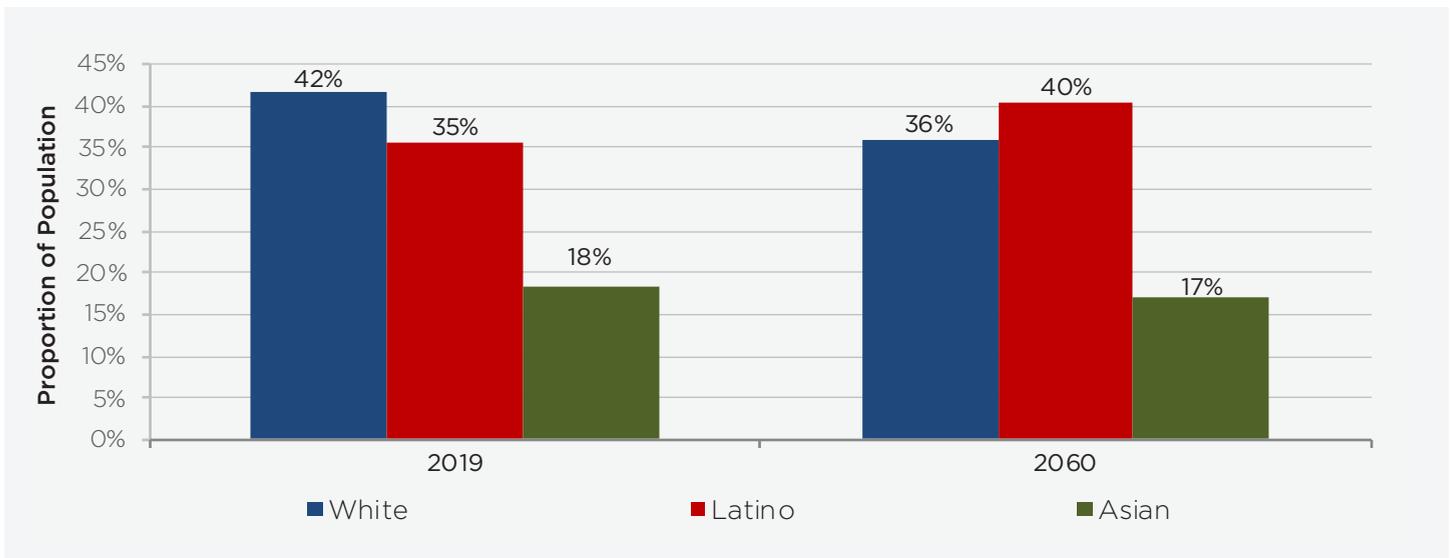
ORANGE COUNTY PROFILE

ORANGE COUNTY'S DIVERSE COMMUNITIES ARE A KEY STRENGTH

Orange County is becoming increasingly diverse, which allows for the exchange of ideas and strategies from individuals with different backgrounds and viewpoints, fueling the innovation and entrepreneurial spirit necessary for sustained economic success in the global economy.

ORANGE COUNTY WILL BECOME INCREASINGLY DIVERSE IN THE FUTURE

Racial and Ethnic Groups as Proportions of the Total Orange County Population, 2019 and 2060



Source: Projections Prepared by Demographic Research Unit, California Department of Finance, May 2019

INTERNATIONAL RESIDENTS

30% of county residents were born in other countries

46% of all residents over age five speak a language other than English at home

Orange County has the 4th largest international population in the nation with approximately 980,532 foreign-born residents. Overall, Orange County is home to 2.2 percent of the nation's international population and 9.1 percent of the state's international population.

Source: U.S. Census Bureau, American Community Survey, Table B05006

ORANGE COUNTY RANKS HIGHLY IN INTERNATIONAL POPULATION

Foreign-Born Population Metrics by Southern California County, 2017

	Foreign-Born Population	% Foreign-Born Population
Los Angeles	3,478,879	34.4%
Orange	954,709	30.3%
Riverside	512,517	21.8%
San Bernardino	443,910	20.9%
San Diego	774,362	23.6%

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table B05006

Top 10 Countries of Origin for Foreign-Born Populations, 2017

	Population in Orange County
Mexico	345,637
Vietnam	146,672
Korea	65,579
China	61,288
Philippines	53,707
India	31,063
Iran	27,718
Taiwan	22,918
El Salvador	17,785
Canada	14,179

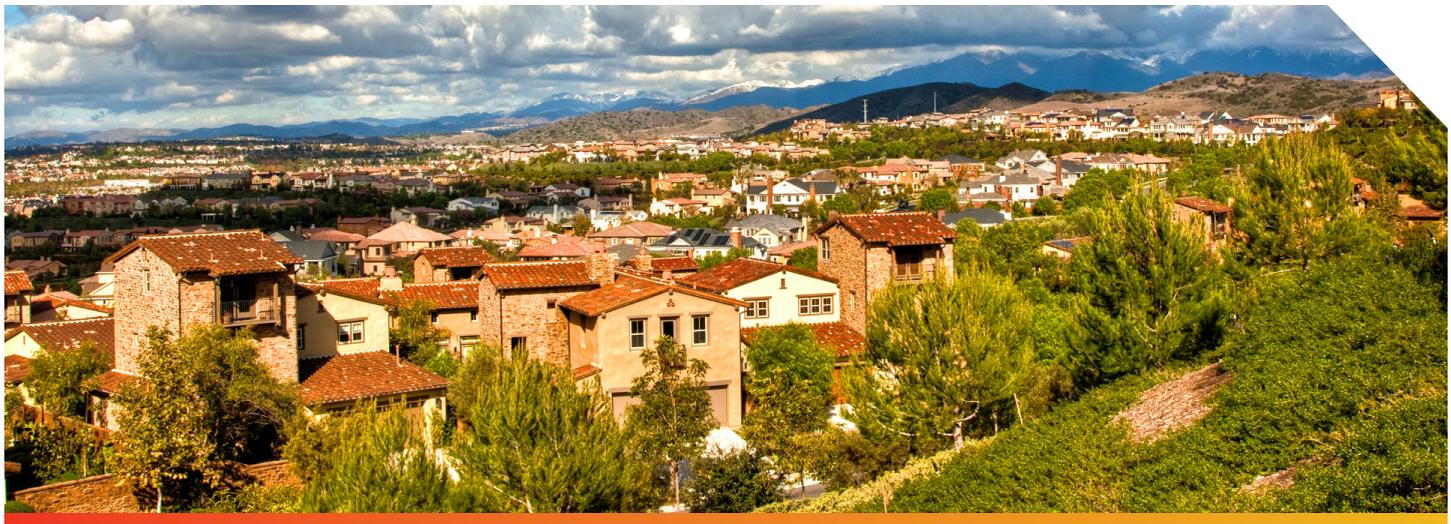
Source: U.S. Census Bureau, American Community Survey, 1-year Estimates, Table B05006

ORANGE COUNTY HAS LOWEST POVERTY LEVEL AND HIGHEST MEDIAN HOUSEHOLD INCOME WHEN COMPARED TO REGIONAL PEERS

By the Numbers Snapshot: Orange County Characteristics Compared to Regional Peers, 2019

County	Median Household Income	Median Age	Poverty Level (%)	Mean Commute Time	Foreign-Born Population (%)
Orange	\$86,217	37.5	8.4%	27.4	30.3%
San Diego	\$76,207	35.4	9.5%	25.7	23.6%
Los Angeles	\$65,006	36.0	13.1%	30.9	34.4%
Riverside	\$63,944	35.0	12.0%	33.1	21.8%
San Bernardino	\$60,420	32.9	14.5%	30.9	20.9%
California (Statewide)	\$71,805	36.1	11.1%	28.8	27.0%

Source: Economic Modeling Specialists International





ORANGE COUNTY PROFILE

EDUCATION | STEM | COLLEGES & UNIVERSITIES: ORANGE COUNTY IS HIGHLY EDUCATED

40% of adults over age 25 have a Bachelor's degree or higher

15% of adults over age 25 have less than a high school diploma

One of Orange County's primary competitive advantages is a deep talent pool of highly educated, qualified residents. In 2017, approximately 27 percent of all Bachelor's degrees granted in Orange County were STEM-related and 33 percent of all Master's and Professional or Doctorate degrees were STEM-related.

	Bachelor's Degree or Higher	Percent Graduate or Professional Degree
Orange County	40.3%	14.2%
Los Angeles County	32.2%	11.1%
San Diego County	38.7%	15.0%
San Bernardino County	20.5%	6.9%
Riverside County	22.2%	7.9%



Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table S1501

ORANGE COUNTY DEPARTMENT OF EDUCATION HIGHLIGHT

Orange County Department of Education (OCDE) is a public education organization offering support services to 27 school districts and more than 600 schools and 20,000 educators serving over 500,000 students in Orange County. Our vision is that "Orange County students will lead the nation in college and career readiness and success." OCDE plays a supportive role in the fulfillment of this vision in collaboration with educators at all levels of student development, from early childhood through higher education, and in partnership with families, businesses, and community organizations, believing that to lead the nation in college and career readiness and success is a high ambition, but within the reach of Orange County students.

ORANGE COUNTY MAJOR UNIVERSITY HIGHLIGHT

UNIVERSITY OF CALIFORNIA, IRVINE (UCI)

Founded in 1965, UCI is the youngest member of the prestigious Association of American Universities. The campus has produced three Nobel laureates and is known for its academic achievement, premier research, innovation and anteater mascot. Led by Chancellor Howard Gillman, UCI has more than 36,000 students and offers 222 degree programs. It's located in one of the world's safest and most economically vibrant communities and is Orange County's second-largest employer, contributing \$5 billion annually to the local economy. UCI tops *Money's* annual list of best colleges which is based on graduation rates, affordability, and alumni salaries. *Forbes* magazine's 2019 roundup of "America's Best Value Colleges" rated UCI the No. 1 public university in the country. The *New York Times'* College Access Index has crowned UCI No. 1 as the university doing the most for the American dream. UCI has consistently ranked as a top 10 public university in *U.S. News & World Report's* college survey.

CALIFORNIA STATE UNIVERSITY, FULLERTON (CSUF)

California State University, Fullerton is a leading provider of the workforce in Orange County having graduated 13,000 students in Spring 2019 in high-demand fields such as engineering, healthcare, and the sciences. CSUF is a leader in educating the residents of Orange County; of our almost 300,000 alumni, 45 percent live in Orange County. In other words, one out of every 21 residents of Orange County are CSUF alumni. CSUF is nationally recognized for excellent academic programs at 33 percent below the national average cost of attendance. With almost 60 percent of CSUF students being the first in their family to graduate from College, the campus is a model for social mobility and economic development. CSUF is an economic engine for Orange County. For every \$1 the state of California invests in CSUF, the campus returns \$13.40 to the California economy. Overall, \$4.3 billion annually is attributed to our alumni having earned a CSUF degree. Cal State Fullerton is the leading destination for community college students having been the No. 1 destination for community college transfer students for 16 of the last 20 years.

CHAPMAN UNIVERSITY

Chapman University's mission is to offer a forward-looking personalized approach to each student's journey, preparing students to rise to the world's challenges and become catalysts for global impact. This mission is expressed through: a rigorous, student-centered and interdisciplinary approach to education; a supportive, inclusive, diverse, and empowering community; making the most of the unique entrepreneurial attributes of Southern California. The University offers over 100 areas of study, including a top 10 ranked film school, undergraduate business program, law school and teaching program. Chapman reached R2 status in the Carnegie Classification of Institutions of Higher Education, indicating the university's growth in research (particularly undergraduate student/faculty research), doctoral and professional practice degree programs. With an alumni network of more than 50,000 worldwide, Chapman graduates join a large cohort of active citizens and industry professionals making an impact, inventing new technologies and solving problems locally, nationally and throughout the global community.

ORANGE COUNTY COMMUNITY COLLEGES

Orange County's four community college districts - Coast, North Orange County, Rancho Santiago, and South Orange County - and nine community colleges, as well as North Orange Continuing Education (NOCE), form the cornerstone of education and skills training in the region, creating college and career advancement opportunities for students while providing employers with the well-prepared, skilled labor force they need to grow and thrive. Taught by instructors and expert professionals, more than 100 community college programs provide hands-on training for almost any industry imaginable, from high-tech to healthcare, creative design to business, and beyond; Orange County's community colleges educate approximately 310,000 students in credit and non-credit courses each year. They supported 82,551 jobs and contributed \$6.4 billion to the county's economy, amounting to 2.6 percent of Orange County's gross regional product in 2017.

ECONOMY | BUSINESS COMMUNITY | LABOR MARKET

ORANGE COUNTY IS THE ECONOMIC ENGINE AND JOB CENTER OF SOUTHERN CALIFORNIA

\$86,217

Median household income (2017)

3.0%

Unemployment rate (June 2019)

\$842,000

Median existing single-family home price (June 2019)

EMPLOYMENT

ORANGE COUNTY HAS THE HIGHEST MEDIAN INCOME AND LOWEST UNEMPLOYMENT RATE IN THE REGION

	Median Household Income	Unemployment Rate (June 2019)
Orange	\$86,217	3.0%
Los Angeles	\$65,006	4.6%
Riverside	\$63,944	4.4%
San Bernardino	\$60,420	4.1%
San Diego	\$76,207	3.3%

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table B19013; California Employment Development Department



ORANGE COUNTY PROFILE

ORANGE COUNTY IS A NET IMPORTER OF WORKERS FROM ALL SURROUNDING COUNTIES WITH OVER 167,000 WORKERS COMMUTING IN EVERY DAY

Intercounty Commuting Patterns between Orange and Neighboring Counties, 2015



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

DISNEY AND UC IRVINE LEAD IN EMPLOYMENT

Largest Employers in Orange County, 2019

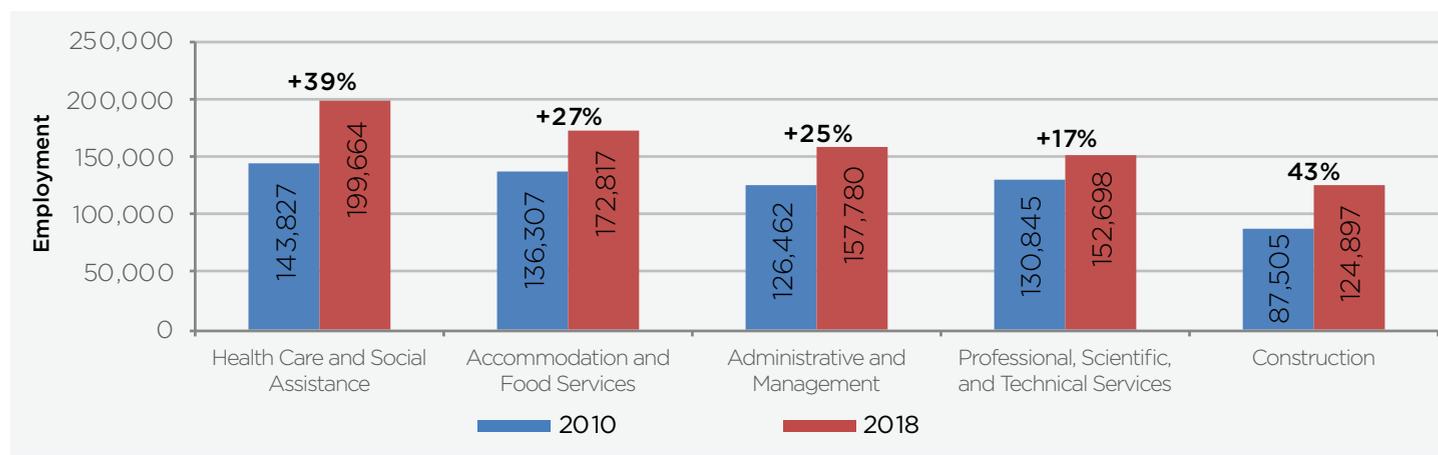
Company	Employment in Orange County
The Walt Disney Co.	30,000
University of California, Irvine	23,884
County of Orange	17,271
St. Joseph Health	14,000
Kaiser Permanente	8,178
Albertsons Southern California Division	7,670
Target Corporation	6,300
Walmart Inc.	6,200
Hoag Memorial Hospital Presbyterian	6,100
Boeing Co.	6,000
MemorialCare Health System	5,400
California State University, Fullerton	5,044
Bank of America Corporation	4,800
Edwards Lifesciences Corporation	4,652
Parker Aerospace	4,582
Allied Universal	4,187
Home Depot Inc.	4,084
Irvine Company	4,038
Cedar Fair LP	4,000
UnitedHealth Group Inc.	3,900

Source: Orange County Business Journal, 2019 Book of Lists

KEY INDUSTRIES CONTINUE TO GROW

The following key sectors together represented almost two thirds of Orange County's job growth between 2010 and 2018.

Orange County Industries with Employment Growth of 20,000+ Since 2010



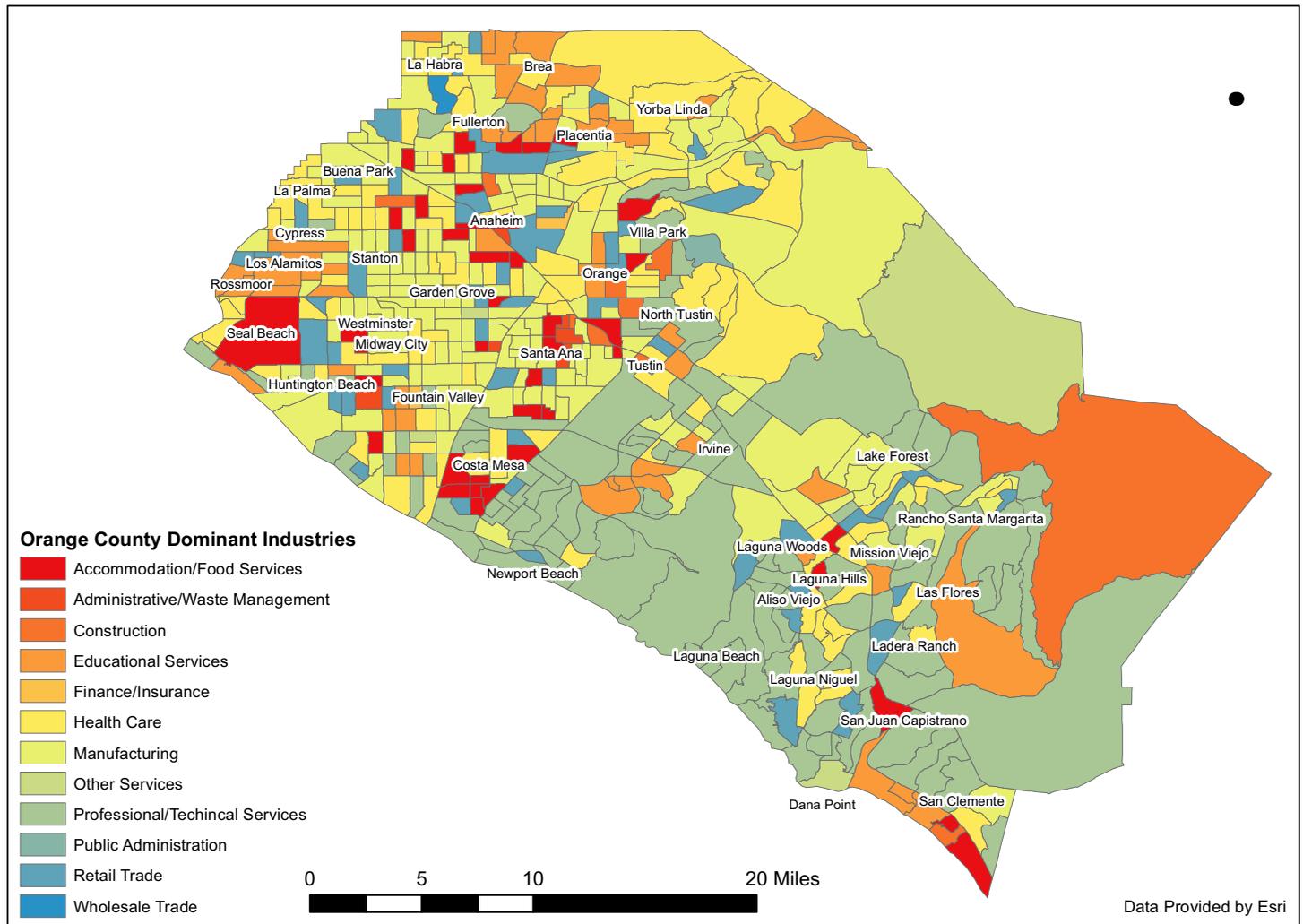
Source: Economic Modeling Specialists International



ORANGE COUNTY PROFILE

INDUSTRIES VARY ACROSS THE COUNTY: FOCUS ON MANUFACTURING IN CENTRAL OC, PROFESSIONAL AND TECHNICAL SERVICES IN SOUTH OC AND ALONG THE COAST

Dominant Industries in Orange County by Census Tract, 2019



ORANGE COUNTY'S INDUSTRY CLUSTERS ARE REMARKABLY DIVERSE

The region's industry clusters include medical devices, diversified technology, computers and peripherals, aerospace, financial services, electronics manufacturing (semiconductors), and real estate development. Orange County ranked 2nd in the number of industries with location quotients over 1, highlighting the broad diversity of the region's high-tech sector.

Top Orange County Industries by Location Quotient, 2019

	Location Quotient
Amusement Parks and Arcades	12.20
Medical Equipment and Supplies Manufacturing	5.44
Apparel Knitting Mills	5.16
Land Subdivision	4.92
Audio and Video Equipment Manufacturing	4.73
Cut and Sew Apparel Manufacturing	4.16
Manufacturing and Reproducing Magnetic and Optical Media	3.10
Semiconductor and Other Electronic Component Manufacturing	2.98
Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	2.97
Nondepository Credit Intermediation	2.63
Electric Lighting Equipment Manufacturing	2.59
Computer and Peripheral Equipment Manufacturing	2.50
Offices of Real Estate Agents and Brokers	2.42
Activities Related to Credit Intermediation	2.33
Aerospace Product and Parts Manufacturing	2.32

Source: Economic Modeling Specialists International

U.S. Cluster Mapping Project — A Different Look at Orange County Industry Clusters

The U.S. Cluster Mapping Project is a collaboration between the U.S. Economic Development Administration and the Institute for Strategy and Competitiveness at Harvard Business School. Providing a robust database of economic indicators at various geographic levels, including labor force productivity, job creation, prosperity, and specialization (location quotient), this database enables users to gain a better understanding of the business environment across the nation.

A Location Quotient measures an industry's employment concentration, with a score of 1.0 as the national average. Orange County's Medical Device sector, for example, has a Location Quotient of 5.3, which means that it is more than five times as concentrated in Orange County as in the nation as a whole. The county's most concentrated industry clusters are listed in the accompanying table.

Orange County Nationally Leading Industry Clusters, 2016

	Employment	National Rank	Location Quotient
Medical Devices	17,355	1	5.30
Apparel	3,532	3	2.32
Biopharmaceuticals	6,504	6	2.04
Lighting	7,073	3	1.90
Information Technology	27,634	5	1.87
Communications Equipment and Services	9,697	4	1.73

Source: U.S. Cluster Mapping, U.S. Department of Commerce, Economic Development Administration, Harvard Business School

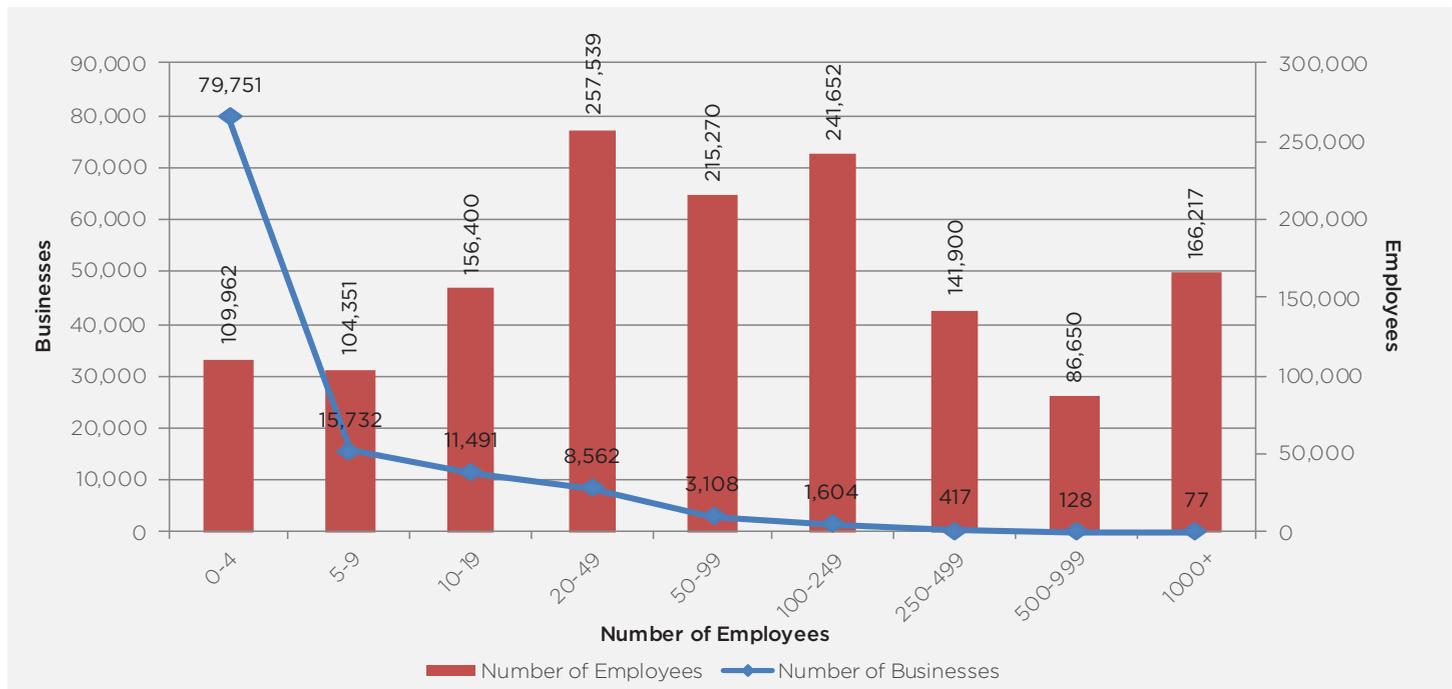


ORANGE COUNTY PROFILE

BUSINESSES OF ALL SIZES THRIVE IN ORANGE COUNTY: 95 PERCENT OF ALL OC BUSINESSES ARE CONSIDERED SMALL BUSINESSES

Small businesses employing under 50 people account for over 95 percent of total businesses in the area, while larger businesses employing over 50 people account for 66 percent of total sales revenue in the region. The largest employers in the region included The Walt Disney Co., University of California, Irvine, and the County of Orange. Collectively these three employers represented over 70,000 jobs or nearly 5 percent of total Orange County employment.

Number of Businesses and Employees, By Size of Business, 2018



Source: California Employment Development Department, Size of Business Data 2018



ORANGE COUNTY COMPARED: OC IS HIGHLY PRODUCTIVE AND CONCENTRATED

GROSS REGIONAL PRODUCT GROWING STRONGLY

Researchers at California State University, Fullerton estimate that Orange County's gross regional product (GRP), a regional-level version of GDP, was \$296 billion in 2018. This number is forecasted to reach \$309 billion in 2019, representing an increase of 5.2 percent.

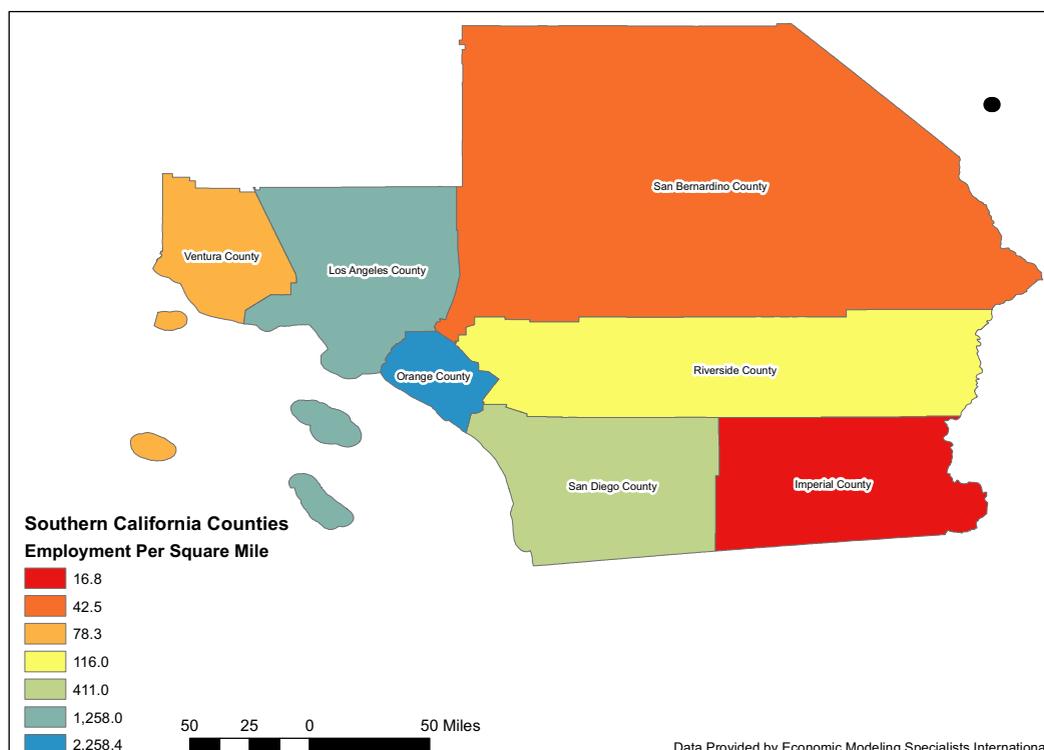
If Orange County was a state, it would be the 23rd largest state by GRP output, just behind Arizona, Wisconsin, and Missouri, while ahead of 27 other states including Connecticut, Louisiana, Oregon and South Carolina.

Gross Regional Product and Employment Comparison by Southern California County, 2018

County	Total Population	Total Employment	Total Regional Product (GRP, \$ in Billions)	Employment Per Capita	GRP Per Capita	GRP Per Square Mile	Employment Per Square Mile	Median Household Income
Orange	3,221,103	1,804,433	\$296	0.56	\$91,894	\$370,463,079	2,258	\$86,217
Los Angeles	10,283,729	5,104,459	\$727	0.50	\$70,727	\$179,236,570	1,258	\$65,006
San Diego	3,337,456	1,727,592	\$235	0.52	\$70,420	\$55,864,749	411	\$76,207
San Bernardino	2,174,938	852,269	\$88	0.39	\$40,295	\$4,369,481	42	\$60,420
Riverside	2,415,955	835,612	\$82	0.35	\$34,103	\$11,433,750	116	\$63,944

Source: Economic Modeling Specialists International; California State University, Fullerton

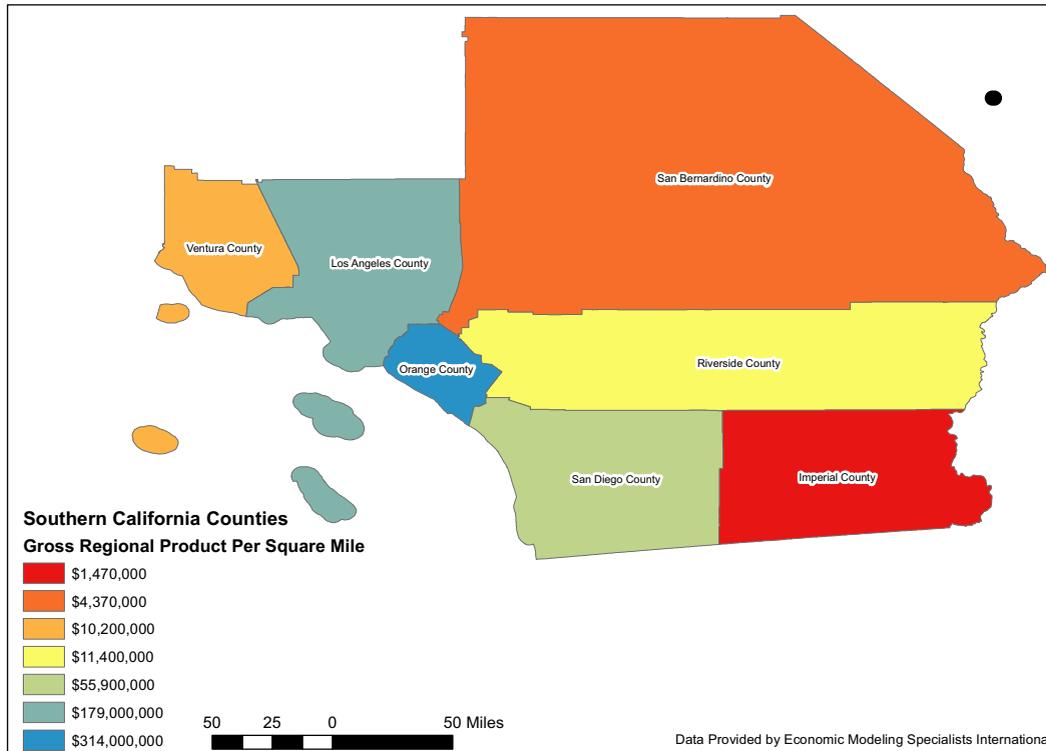
Employment Per Square Mile by Southern California County



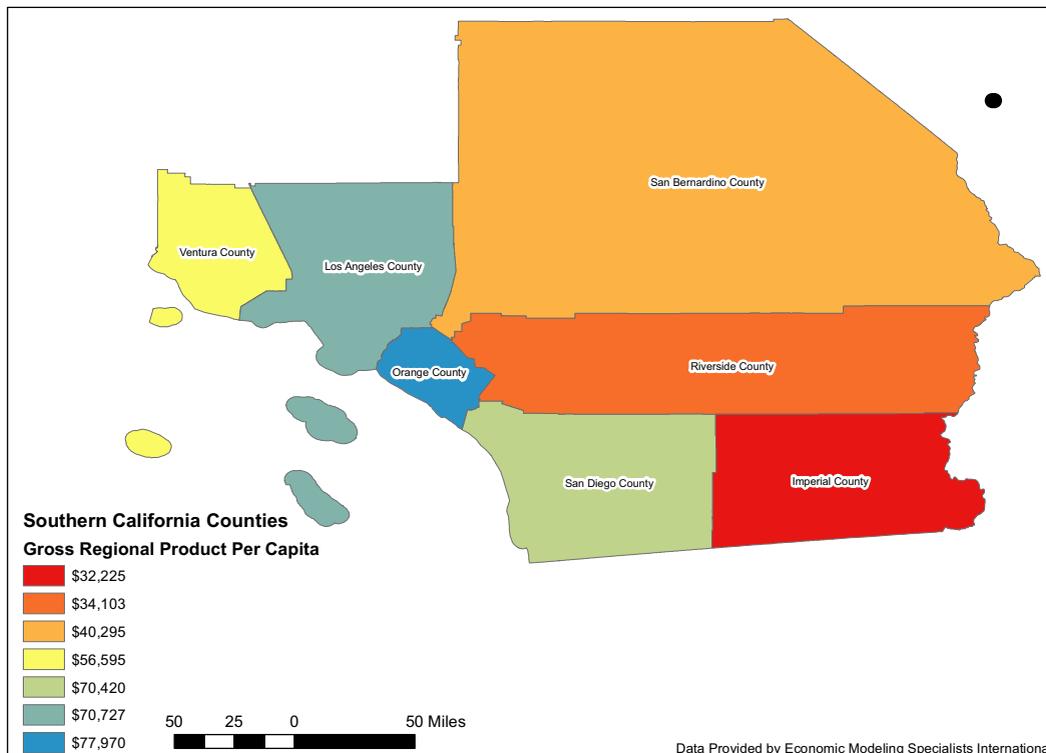


ORANGE COUNTY PROFILE

Gross Regional Product (GRP) Per Square Mile by Southern California County



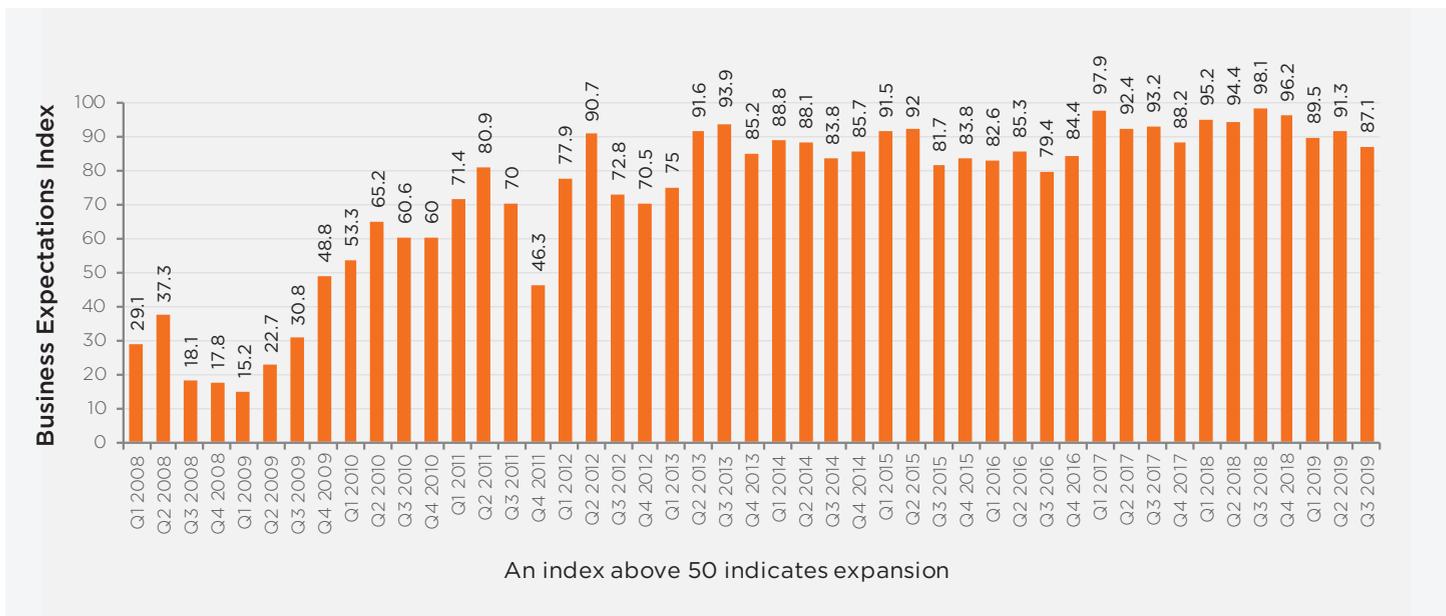
Gross Regional Product (GRP) Per Capita by Southern California County



ORANGE COUNTY EXECUTIVES ARE OVERWHELMINGLY POSITIVE ABOUT THE CURRENT AND FUTURE ORANGE COUNTY ECONOMY

The Orange County Business Expectations Index, a measure of local business executives' confidence in current and future business trends in the county, stood at 87.1 in the third quarter of 2019. The index has remained in the 80-98 range since the second quarter of 2013, indicating a very high level of sustained optimism in the local economy. As any reading above 50 indicates an expectation of future growth by local business leaders, local executives are extremely positive about the future of Orange County's economy and business climate.

Orange County Business Expectations Index, Q1 2008 - Q3 2019



Source: California State University, Fullerton

LABOR MARKET OVERVIEW

STRONG REGIONAL JOB MARKET SUPPORTS SALARY GROWTH, TOURISM CONTINUES TO CLIMB

Orange County's strong labor market provides a variety of jobs at every salary level and contributes to significant economic advantages, such as higher than average wages and a strong business climate. Employment and earnings statistics for specific industries offer major indicators of the county's overall economic health. Orange County's most in-demand occupations are extremely varied in terms of industries, salaries, and required educational levels, highlighting the region's diverse labor market and strength in a variety of sectors.

Average county salaries increased from \$47,705 in 2001 to \$74,284 in 2018.

Industries with the largest average salaries in 2018 included:

- Utilities — \$160,148
- Finance and Insurance — \$128,449
- Management of Companies — \$126,582

Industries with largest year-over-year salary increases in 2018:

- Management of Companies (+\$7,032)
- Manufacturing (+\$3,074)
- Information Technology (+\$2,427)



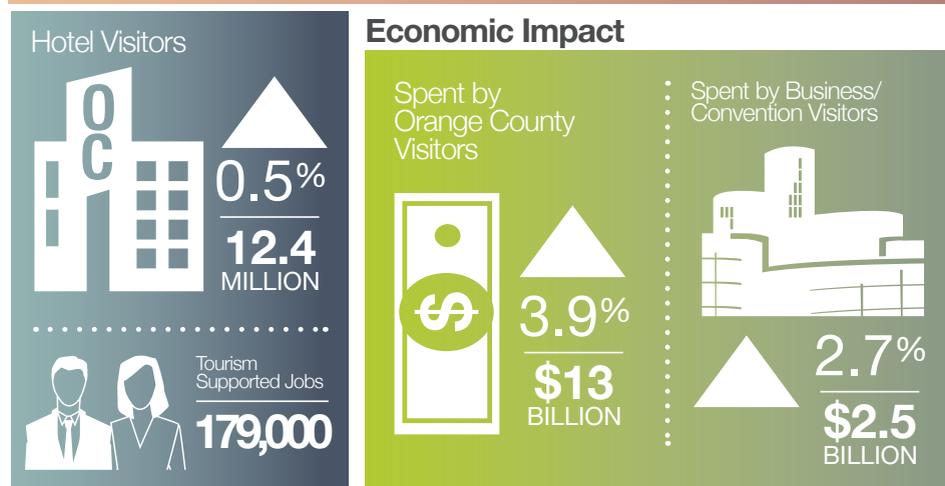
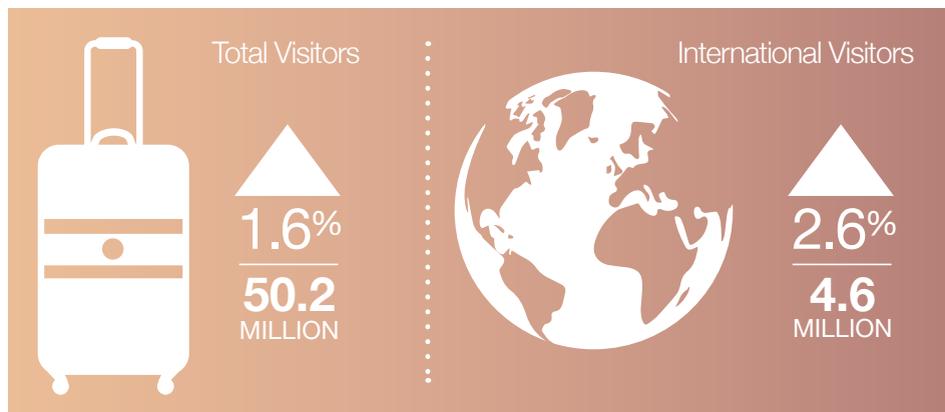
ORANGE COUNTY PROFILE

TOURISM THRIVES IN ORANGE COUNTY, REACHES NEW ALL-TIME HIGHS



ORANGE COUNTY VISITOR **20**
GROWTH 18
★ ★ 5TH RECORD YEAR IN A ROW ★ ★

Domestic & International Visitor Growth



visitanaheim.org | 714.765.2800

Source: VisitAnaheim

Approximately 50.2 million travelers visited Orange County in 2018, a 1.6 percent increase from the previous year and representing a record high for the region. Visitor spending in Orange County reached \$13.0 billion in 2018, representing an increase of 3.9 percent over 2017. Tourism-related employment in Orange County reached 220,093 in 2018 and is expected to hit 225,609 in 2019, an increase of 2.5 percent. Tourism-related employment is expected to rise to 247,816 by 2029.

Source: VisitAnaheim; Economic Modeling Specialists International

INTERNATIONAL MARKETPLACE

Thanks to its prime location on the Pacific Rim at the heart of the Southern California market, including strong global transportation and logistical links due to its central location near major trade ports such as Port of Los Angeles and Port of Long Beach, Orange County has long attracted workers and businesses from around the world. International trade also thrives in Orange County.

The region's largest trade partners in 2018 included:



The largest exports from Orange County in 2018 included:

- Computer and Electronic Product Manufacturing
- Transportation Equipment Manufacturing
- Chemical Manufacturing

The table below highlights the county's largest foreign-owned companies, showing their sector and total county employment. These companies represent a wide variety of sectors, from aerospace to banking to consumer electronics.

Largest Foreign-Owned Companies in Orange County, 2019

Company	Sector	Employment in Orange County	Parent Company	Country of Origin
Panasonic Avionics Corp.	Inflight Entertainment Systems	2,306	Panasonic Corp.	Japan
B. Braun Medical Inc.	Medical Product Manufacturing	1,709	B. Braun Holding GmbH	Germany
Oakley Inc.	Eyewear and Apparel	1,700	Luxottica Group SpA	Italy
Zodiac Aerospace	Aircraft Interiors	1,650	Safran	France
Broadcom Inc.	Semiconductor Products	1,630	Avago Technologies	Singapore
Pacific Investment Management Company	Investment Management	1,380	Allianz SE	Germany
Experian	Information Services	1,300	Experian PLC	Ireland
Thales Avionics Inc.	In-Flight Entertainment Systems	1,300	Thales Group	France
MUFG Union Bank	Bank	1,225	MUFG	Japan
Alcon Research Ltd.	R&D	1,100	Novartis	Switzerland
Canon U.S.A. Inc.	Office Products	1,032	Canon	Japan
MicroVention Inc.	Medical Device Manufacturer	1,000	Terumo Corp.	Japan
Schneider Electric	Energy Management	976	Schneider Electric SE	France
Ingram Micro Inc.	Technology Products	900	HNA Technology	China
Medtronic Neurovascular	Medical Device Manufacturer	900	Medtronic PLC	Ireland
T-Mobile USA Inc.	Cellphones	900	Deutsche Telekom	Germany
Karma Automotive	Electric Plug-In Vehicles	878	Wanxiang Group	China
TowerJazz	Water Foundry	820	Tower Semiconductor	Israel
Toshiba	Consumer Electronics	700	Toshiba Corporation	Japan
Meggitt PLC	Defense Services	681	Meggitt PLC	United Kingdom

Source: Orange County Business Journal, 2019 Book of Lists



ORANGE COUNTY PROFILE

QUALITY OF LIFE

ORANGE COUNTY ENJOYS ONE OF THE NATION'S LOWEST CRIME RATES

Regional Comparison of Violent and Property Crime Rates

IRVINE Safest Major City in America

20% lower crime in Orange County than the state and nation

Orange County and Regional Crime Indexes, 2019

	Total Crime	Violent Crime	Property Crime
Orange County	77	58	80
San Diego	77	85	76
San Jose Metro	90	72	92
Sacramento	99	117	97
Los Angeles County	101	129	97
Riverside County	105	86	108
Boston Metro	106	189	94
San Bernardino County	107	118	105
Minneapolis Metro	114	112	114
Austin	127	89	132
Dallas Metro	128	124	128
Seattle Metro	150	88	159
San Francisco	212	192	215
California	103	111	101
United States	100	100	100

Source: Esri Crime Index Data

Note: An index value of 100 represents the national average



ORANGE COUNTY
GRANTMAKERS

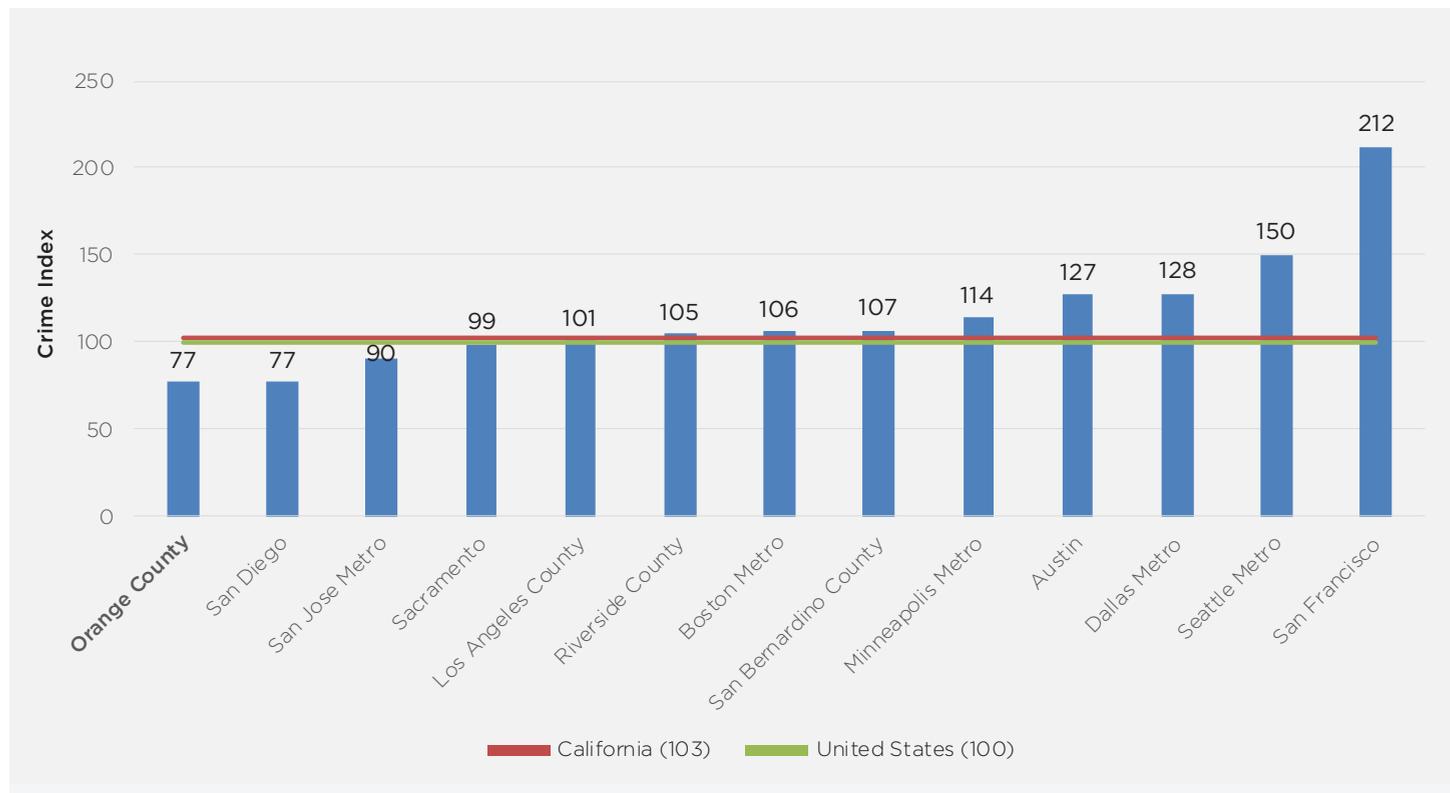
Advancing social impact
by supporting, strengthening,
and building adaptive leadership
across our nonprofit and philanthropic
community.

Find out more at:

<https://www.ocgrantmakers.org>

Orange County Grantmakers is proud to support the 2019-2020 Orange County Community Indicators Report.

Regional Total Crime Indexes, 2019





ORANGE COUNTY PROFILE

SOCIAL PROGRESS INDEX: ORANGE COUNTY HIGHEST RANKED LARGE METRO COUNTY IN CALIFORNIA

The Social Progress Index is designed to capture how well a society provides its people with the things they really care about, including health, safety, shelter, education, rights, and freedom. Orange County scored 64.4 out of 100, which placed it 6th highest among California counties, and is by far the largest metropolitan county in terms of population to rank so high.

The index, developed by a scientific team led by Professors Michael E. Porter of Harvard Business School and Scott Stern of MIT, focuses on social and environmental outcomes such as health, literacy, rights, and tolerance. It is a complement to, not a replacement for, GDP and other economic measures and aggregates measurements across three broad dimensions: Basic Human Needs, Foundations of Well-being and Opportunity. It answers 12 important questions, listed below, that are unanswered by conventional economic indices.

Basic Human Needs	Foundations of Wellbeing	Opportunity
<p>Nutrition & Basic Medical Care Do people have enough food to eat and are they receiving basic medical care?</p> <p>Water & Sanitation Can people drink water and keep themselves clean without getting sick?</p> <p>Shelter Do people have adequate housing with basic utilities?</p> <p>Personal Safety Do people feel safe?</p>	<p>Access to Basic Knowledge Do people have access to an educational foundation?</p> <p>Access to Information & Communication Can people freely access ideas and information from anywhere in the world?</p> <p>Health & Wellness Do people live long and healthy lives?</p> <p>Environmental Quality Is this society using its resources so they will be available to future generations?</p>	<p>Personal Rights Are people's rights as individuals protected?</p> <p>Personal Freedom & Choice Are people free to make their own choices?</p> <p>Tolerance & Inclusion Is no one excluded from the opportunity to be a contributing member of society?</p> <p>Access to Advanced Education Do people have the opportunity to access the world's most advanced knowledge?</p>

California Social Progress Index, 2018

Rank	County	Population
1	Marin	262,879
2	Placer	396,691
3	Contra Costa	1,155,879
4	San Mateo	774,485
5	El Dorado	191,848
6	Orange County	3,222,498
7	San Luis Obispo	280,393
8	San Francisco	883,869
9	Santa Clara	1,954,286
10	Ventura	856,598
13	San Diego	3,351,786
28	Los Angeles	10,253,716
29	Riverside	2,440,124
36	San Bernardino	2,192,203

Social Progress Index for California Counties, 2018

Note: Two California counties, Alpine and Sierra, were excluded due to a lack of sufficient data.

California Social Progress Index, 2018

	Orange County Ranking
Basic Human Needs	3
<i>Nutrition and Basic Medical Care</i>	2
<i>Water and Sanitation</i>	5
<i>Shelter</i>	35
<i>Personal Safety</i>	14
Foundations of Well-being	9
<i>Access to Basic Knowledge</i>	6
<i>Access to Information and Communications</i>	10
<i>Health and Wellness</i>	6
<i>Environmental Quality</i>	45
Opportunity	12
<i>Personal Rights</i>	26
<i>Personal Freedom and Choice</i>	11
<i>Inclusiveness</i>	40
<i>Access to Advanced Education</i>	7

Social Progress Index for California Counties, 2018

Data Notes

The racial and ethnic categories presented are the three largest in Orange County and are not mutually exclusive. Latino includes children of any race who are of Hispanic or Latino ethnicity. Asian includes the race Asian alone and includes both Hispanic and non-Hispanic. White, non-Hispanic includes only White alone and non-Hispanic. Projection data by race/ethnicity and age have been updated by the source.

The Social Progress Index for California Counties represents a similar analysis as the overarching Social Progress Index at the state-level yet providing a detailed assessment of California counties. As such, the "Orange County Ranking" provided in the tables above ranks Orange County against other California counties.

Sources:

Place – Land Area: County of Orange Public Works; Density: U.S. Census Bureau, GHT-PHI-R: Population, Housing Units, Area, and Density, Census 2010 (land area) and State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State – January 1, 2011-2019, Sacramento, California, May 2019.

People – Population 2019 and 2060: California Department of Finance, Table P-2; Race/Ethnicity and Age: California Department of Finance, Table P-2; Foreign Born, Language: U.S. Census Bureau, 2017 American Community Survey, 1-Year Estimates, Table DP02;

Education – Educational Attainment: U.S. Census Bureau, 2017 American Community Survey, 1-Year Estimates, Table S1501

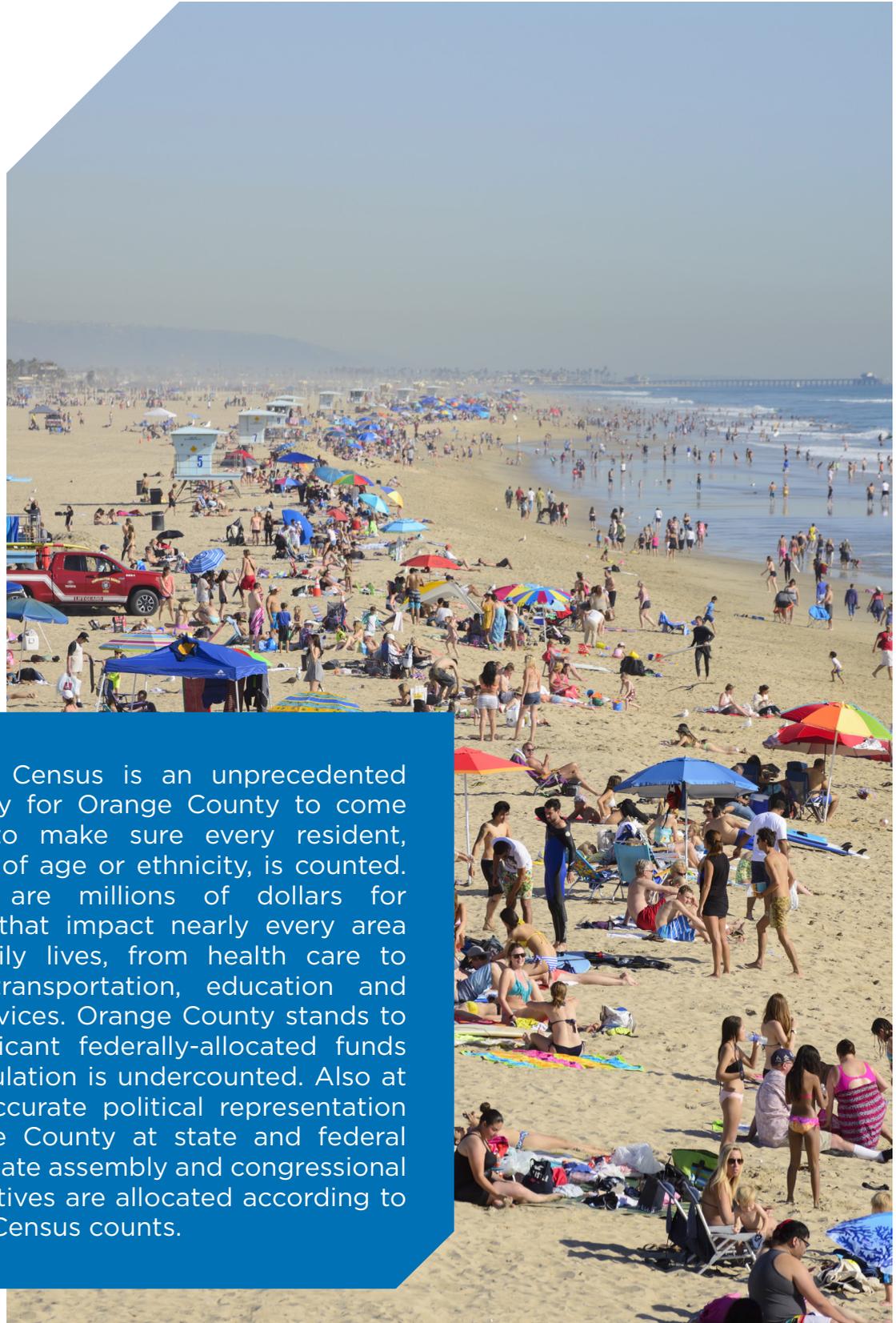
Economy – Median Household Income: U.S. Census Bureau, 2017 American Community Survey, 1-Year Estimates, Table B19013; Unemployment Rate: California Employment Development Department Labor Market Information, May 2019; Median Existing Single-Family Home Price: California Association of Realtors, Current Sales and Price Statistics

International Marketplace – Top Trading Partners and Largest Orange County Exports: California State University, Fullerton, International Trade Forecast

Quality of Life – Crime Statistics: Federal Bureau of Investigation, Uniform Crime Reporting Program



2020 CENSUS



The 2020 Census is an unprecedented opportunity for Orange County to come together to make sure every resident, regardless of age or ethnicity, is counted. At stake are millions of dollars for programs that impact nearly every area of our daily lives, from health care to housing, transportation, education and human services. Orange County stands to lose significant federally-allocated funds if our population is undercounted. Also at stake is accurate political representation for Orange County at state and federal levels, as state assembly and congressional representatives are allocated according to decennial Census counts.

INTRODUCTION

As mandated by the Constitution, the United States Census Bureau conducts a nationwide count of its population every 10 years. With a budget of approximately \$12.5 billion, the 2020 Census will gather key demographic information, including population figures, the number of people per household, and age, gender and ethnicity data.

WHAT'S AT STAKE?

The 2020 Census will have three important consequences for California and Orange County.

01 CALIFORNIA IS AT RISK OF LOSING A CONGRESSIONAL SEAT

Each state is apportioned two senators, while seats in the House of Representatives are apportioned to states based on population size. Since overall membership for the House of Representatives is capped at 435, California is in danger of losing a seat after the Census if there is an undercount of its population. According to the state Legislative Analyst's Office, California "gained one fewer seat in Congress than it was entitled to receive and was estimated to have lost over \$200 million of federal funds in a single fiscal year" due to an undercount of approximately 835,000 residents in the 2010 Census.

States with the Most U.S. House of Representatives Seats

California	53
Texas	36
Florida	27
New York	27
Illinois	18
Pennsylvania	18

Source: U.S. Census Bureau, 2010 Census Briefs, Congressional Apportionment

02 BILLIONS OF DOLLARS ARE AT STAKE

Census data is used to allocate funding for many federal programs. The George Washington Institute of Public Policy estimates that 300 federal programs allocate \$800 billion in funding each year based on census results. In 2016, the state of California received approximately \$115 billion in Census-related funding, 80 percent of its total federal funding. Of that \$115 billion, Orange County received over \$9 billion - in a single year - in Census-related funding, highlighting the significant impact Census-related funding has on the region and, the significant potential loss should an inaccurate Census count occur.

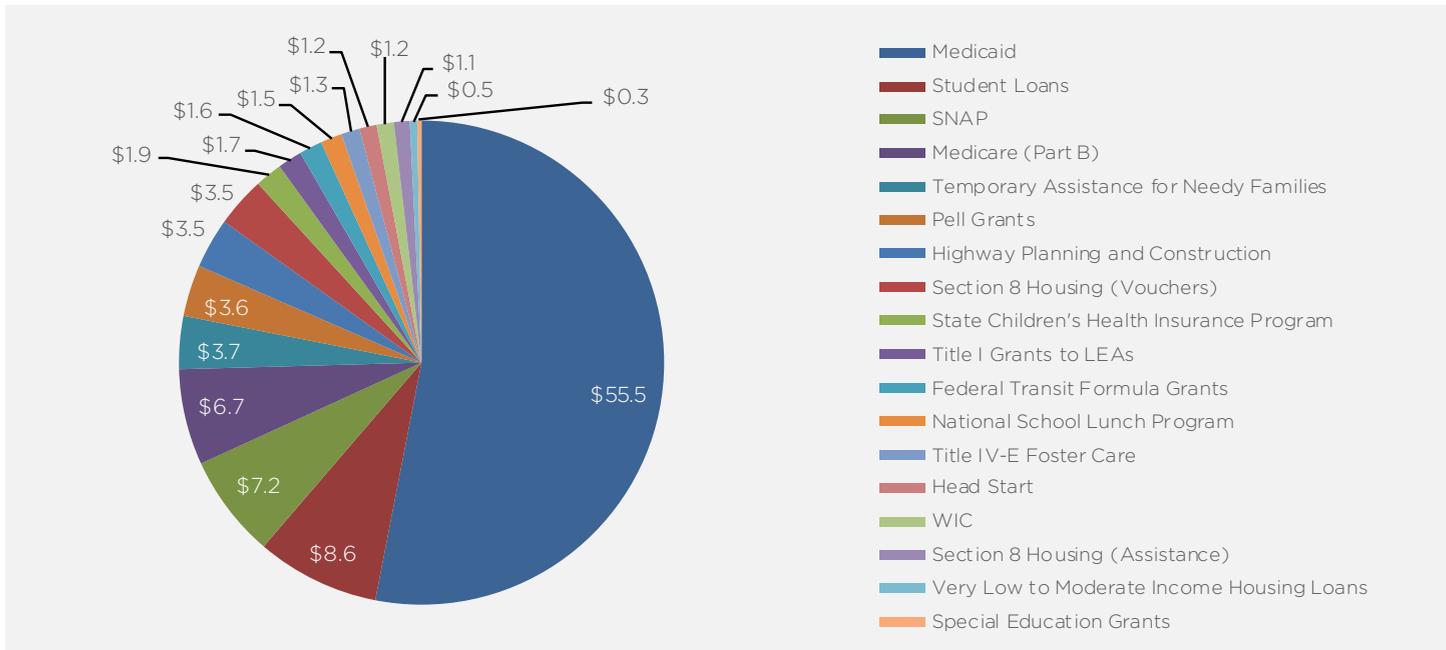
Key census-related federal programs include:

- Medicaid
- Children's Health Insurance Program
- Supplemental Nutrition Assistance Program (SNAP)
- Title IV-E Foster Care
- Title IV-E Adoption Assistance
- The Child Care and Development Fund
- Pell Grants (college financial aid)
- Highway Planning and Construction
- Temporary Assistance for Needy Families



2020 CENSUS

California Funds Allocated Using Census Data (2016, \$ in Billions)



Source: The George Washington University Institute of Public Policy - Counting for Dollars 2020

03 LOCAL PLANNING EFFORTS DEPEND ON AN ACCURATE CENSUS

Census data is the basis for market analysis and strategic planning for a variety of state and local-level organizations, businesses, nonprofits, and others; an inaccurate Census could make it much more difficult for these organizations to plan for the future. For example, this data helps cities and counties decide where to put the next fire station and how to staff it. It helps educators know where schools need to be located and to hire the right number of teachers. If our teenagers are undercounted, our county will not get a fair allotment for Pell Grants or federal student loans for college. The business community uses Census-related data to perform business strategic planning to determine actions such as expansion plans and where their future workforce will come from.

Organizations also use Census data for planning health care services for veterans, seniors, and people with disabilities. In short, Census data impacts nearly every aspect of our daily lives.



The Census is the cornerstone of our democracy. An accurate count ensures that we: direct appropriate resources to underrepresented communities; capture and produce better business data; make sure children thrive; and create equitable opportunities in the communities in which we live and work. We live in one of the most diverse regions of the United States — let's make sure we celebrate our diversity and accurately account for it.



Jack Toan, Vice President, Community Relations, Wells Fargo

ORANGE COUNTY: IN DANGER OF AN UNDERCOUNT

ONE-THIRD OF ORANGE COUNTY’S RESIDENTS ARE “HARD TO COUNT”

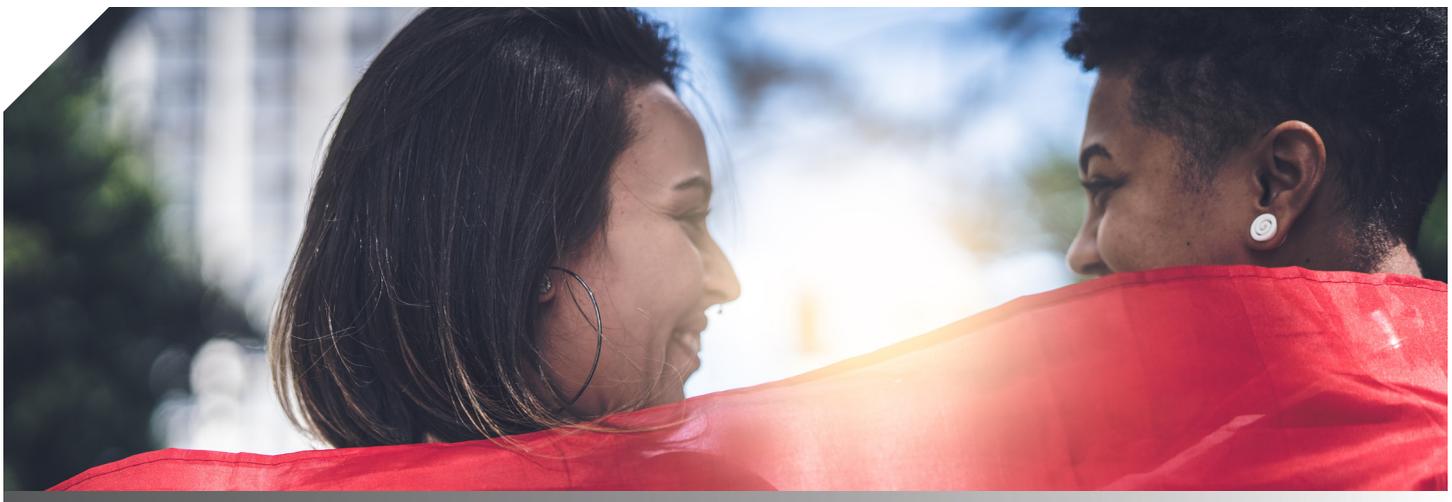
It is estimated that more than one-third of Orange County’s residents fall into one of the “hard to count” categories. Hard-to-Count (HTC) residents are those who have historically been shown to have been undercounted, including young children, impoverished residents, certain ethnic groups, seniors, people with disabilities, and renters. In the 2010 Census, young children were the group least likely to be counted accurately, and evidence suggests that this is even more of an issue in California than in other states. An undercount of these groups – leading to lower federal funding – would have particularly severe consequences because many in these groups are already underserved by state and federal programs.

Hard-to-Count (HTC) Communities, as defined by the State of California

Latinos	Seniors/Older Adults
African-Americans	Homeless Individuals and Families
Native Americans and Tribal Communities	Children Ages 0 – 5
Asian-Americans & Pacific Islanders	Veterans
Middle-Eastern North Africans	Areas with low broadband subscription rates and limited or no access
Immigrants and Refugees	Households with limited English proficiency
Farm Workers	People with Disabilities
Lesbian, Gay, Bisexual, Transgender, and Queer/Questioning (LGBTQ)	

Source: State of California, CA Census 2020

According to analysis by the Advancement Project, Orange County’s over 1.4 million HTC residents represent approximately 7.4% of the state’s estimated 19 million total HTC population. The U.S. Census Bureau uses the Low Response Score (LRS) metric, which aggregates multiple factors – including age, poverty status, population density, and 2010 Census nonresponse rate – to predict which groups will likely be hard to count in 2020. The graph on the next page highlights the HTC populations living in High and Very High LRS Tracts by ethnicity.





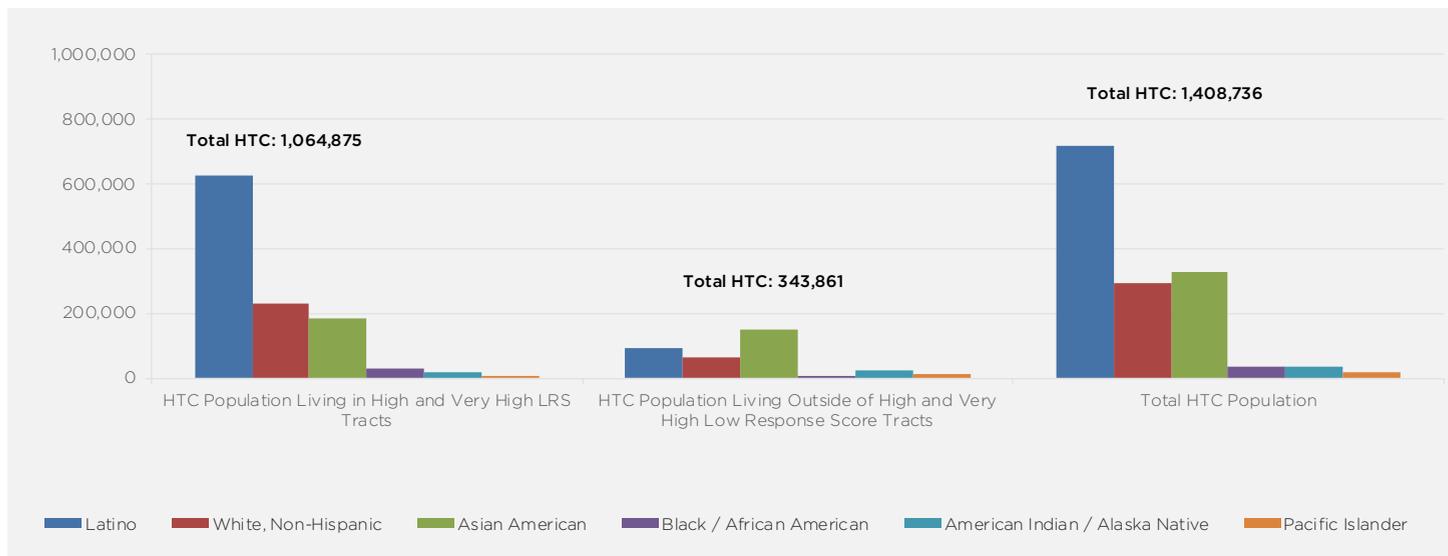
2020 CENSUS

WHO ARE ORANGE COUNTY'S HARD-TO-COUNT?

While the State of California has identified 15 populations that are considered HTC (named previously), there are several populations in Orange County that are at greater risk of being undercounted, including:

- Residents living 200% below the poverty line: this encompasses nearly 28% of Orange County's population, or 838,000 people;
- Foreign-born residents: 32%, or 963,000 people;
- Seniors: 15%, or 458,000 people;
- Limited English Proficiency (LEP) Spanish speakers: more than 10%, or 318,000 people;
- Children ages 0 to 5: 7.4%, or 223,000+ people;
- LEP Vietnamese: almost 4%, or more than 117,000 residents; and
- Middle-Eastern North Africans (MENA): 3%, or more than 96,000 residents.

Orange County HTC Estimates by High and Very High Low Response Scores (LRS) and Ethnicity



Source: Advancement Project, 2020 Census Webinar Series - Orange County



To achieve a fair and accurate Census count in Orange County, we need participation from all sectors. We need to educate and motivate. We need coordination and collaboration. A significant percentage of our region's population is considered Hard-to-Count -- these are our historically undercounted and underrepresented neighbors. To ensure their voices are heard, we need to count them. It's an all-hands-on-deck moment.



**Miguel Hernandez; Executive Director,
Orange County Congregation Community Organization (OCCCO)**

THE DIGITAL DIVIDE AND ITS IMPACT ON AN ACCURATE COUNT

2020 will see the first-ever fully digital Census, most likely exacerbating the problem of undercounting. While the U.S. Census Bureau estimates that this switch will save more than \$5 billion in administrative costs, it does have several drawbacks, including concerns about privacy and cybersecurity. Additionally, not all residents have reliable high-speed Internet access, which could prevent them from filling out the Census. Approximately 10 percent of Orange County residents, for example, either lack Internet access or only have access to dial-up connections; as with Hard-to-Count communities, these residents tend to already be underprivileged and would see a disproportionate impact from an undercount.

Public Policy Institute of California has estimated the likelihood of low response for each individual Census tract in California. More than one in 10 (10.9 percent) of Orange County Census tracts fall into this category. Orange County has the lowest percentage of HTC communities compared to neighboring counties. However, with nearly 11 percent of Orange County Census tracts considered likely to not respond to the Census, there remains a significant HTC population, making it imperative that agencies and stakeholders support efforts aimed at reaching our HTC communities.

The likelihood of no response score is based on a number of factors including ethnic groups, citizenship and the proportion of young children in a region; groups which are typically hard to count. The hard-to-count housing score takes into account the percentage of occupied rental units, percent of overcrowded rental units, and the percent of occupied mobile homes in a region – all segments which tend to move around, adding to the potential for an undercount. Finally, the high-speed Internet connection score is based on the number of average number of households with a high-speed Internet connection for every 1,000 households in a Census tract, scaled up to the county level. As the first digital census, access to high-speed Internet is a crucial amenity to ensure a proper count. Together, these metrics help highlight the difficulties Orange County and other regions may have in minimizing a potential undercount for the 2020 Census.

Hard-to-Count Indexes by Southern California County

	Likelihood of No Response	African Americans, Latinos and Native Americans	Non-Citizens	Young Children	Hard-to-Count Housing Score	High Speed Internet Connections
Orange County	10.9%	35.9%	14.7%	6.1%	4	600-800
Riverside	16.9%	53.8%	11.8%	6.8%	3	600-800
San Diego	17.5%	38.2%	11.7%	6.5%	3	600-800
San Bernardino	28.8%	60.1%	11.1%	7.3%	4	600-800
Los Angeles	33.4%	56.5%	17.3%	6.3%	5	600-800

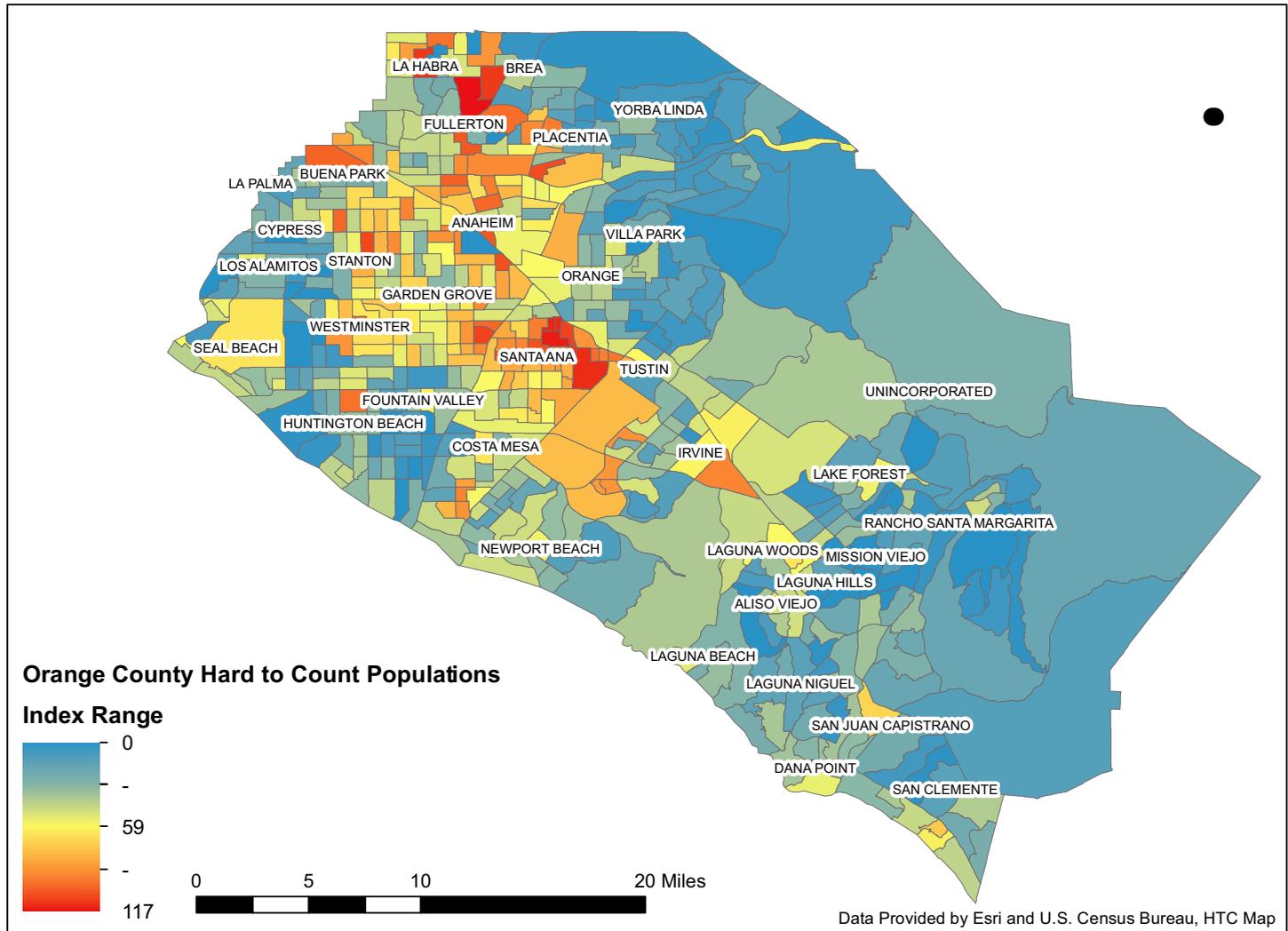
Source: The Public Policy Institute of California, 2020 Census Maps: California's Hard-to-Count Communities



2020 CENSUS

The following graph uses data from the California Department of Finance, which has partnered with the California Census Office to create a California Hard-to-Count Index based on multiple demographic, housing and socioeconomic variables, such as broadband internet access, number of occupants per room, and percentage of households receiving public assistance income. The majority of Orange County's HTC residents, as seen in the map below, live in the northern part of the county.

Orange County's Hard to Count (HTC) Census Tracts by HTC Index (Lower Index = Easier to Count; Higher Index = Harder to Count)



Orange County has a total of 42 census tracts with High and Very High LRS (Low Response Scores), mainly in:

- Santa Ana (17 tracts)
- Anaheim (9)
- Fullerton (6)

These cities have a much higher percentage of both renters and overcrowded housing units than the county as a whole, which could compound the difficulties in counting their residents because renters tend to move more frequently than homeowners and overcrowded units often provide inaccurate information. They also have relatively high proportions of non-English speakers, which could pose another difficulty for Census takers.

A ONCE IN A DECADE OPPORTUNITY

This Census is a chance to mobilize residents, businesses, government, and nonprofits to change the way dollars are allocated and bring a fair share of federal funds into Orange County. Orange County had a 75 percent response rate to the 2010 census, compared to 80 percent in 2000 and 69 percent in 1990.

In order to avoid both a potential undercount and an expensive, time-consuming follow-up process, the State of California is doubling down on outreach about the importance of the Census. It has allocated:

Nearly **\$100 million** in 2018-2019

an additional **\$87 million** proposed for 2019-2020

Approximately \$129.2 million is earmarked to fund outreach contracts and implement a comprehensive media strategy. The state government has also created the California Complete Count Committee, a 25-member committee that will guide funding and outreach for the 2020 census. Of this funding, approximately \$26.7 million has been allocated to county contracts. In order to receive funding, counties must opt in, provide a board resolution, establish a local Complete Count Committee, and submit a plan for state approval. Orange County has currently received \$1.5 million in funding, tied with San Diego County for the second highest in the state; Los Angeles County received \$9.4 million, more than a third of the total.

REGIONAL COLLABORATION IN ORANGE COUNTY AND COUNTY-LED COORDINATION: EDUCATING, MOTIVATING AND ACTIVATING RESIDENTS TO PARTICIPATE

The County of Orange was awarded \$1.5M to lead the OC Complete Count Committee enumeration and outreach efforts, which is being managed by the County's Executive Office. The OC Complete Count Committee's (OCCCC) goal is to count every resident in Orange County by leveraging existing County and city resources to increase census awareness, funding trusted messengers who will engage with over 300,000 households in HTC Census tracts and block-groups, and launching a robust media and advertising campaign that will try to reach every local ethnic digital, print, and social media outlet in Orange County. As of July 2019, the OCCCC consists of more than 200 representatives from 106 organizations.

To maximize collaboration among these stakeholder groups, the County created five subcommittees under the OCCCC: Government Agencies & Cities; Media, Communication & Advertising; Immigrant, Limited English & Language Access; Homeless, Unconventional Housing & Low-income; and Outreach, Recruitment, Data Protection & Technology subcommittees. Each group has been tasked with educating, motivating, and activating HTC residents to increase participation in the 2020 Census.

OCCCC Goals:

1. Educate county residents on the Census timeline and purpose with a particular emphasis on the HTC populations;
2. Identify HTC populations and best strategies to educate them on the Census;
3. Reduce the HTC populations' fear and distrust of government;
4. Build trust around the Census;
5. Motivate HTC populations to participate in the Census; and
6. Reduce barriers for HTC populations to participate in the Census.



2020 CENSUS

GOALS FOR EACH SUBCOMMITTEE:

GOVERNMENT & CITIES

1. Leverage existing infrastructure/outlets to maximize Census efforts
2. Reach out to other cities and government groups to assist with the Census effort through social media, events and marketing
3. Message the Census timeline and Census Action Centers/Kiosks

MEDIA, COMMUNICATION & ADVERTISING

1. Create messaging for County Census effort
2. Manage media efforts – earned, paid and social
3. Identify and recommend ad buys
4. Create and manage social media campaigns
5. Design, print and distribute posters, banners and promotional items

IMMIGRANTS, LIMITED ENGLISH & LANGUAGE ACCESS

1. Establish, maintain and distribute language access tools
2. Establish and maintain language access solutions
3. Identify opportunities to reach immigrants and individuals who speak limited English
4. Provide feedback on best outlets and messages for immigrants and individuals who speak limited English

HOMELESS, UNCONVENTIONAL HOUSING & LOW-INCOME

1. Outreach to homeless individuals and shelters
2. Provide feedback on best outlets and messages for individuals experiencing homelessness and living in unconventional housing
3. Educate families living in unconventional housing about the proper way to complete the Census form (+9 members)

OUTREACH, RECRUITMENT, DATA PROTECTION, & TECHNOLOGY

1. Educate and motivate seniors, renters, veterans, college students and parents of children under five (HTC groups)
2. Establish, identify and promote Census Action Centers/Kiosks
3. Cross promote strategies to other groups
4. Promote U.S. Census Bureau enumerator recruitments
5. Identify technology solutions for educating and motivating HTC populations

For additional information about the County of Orange's 2020 Census outreach efforts, please visit www.ocgov.com/census2020.

CITY-LED OUTREACH EFFORTS

Several Orange County cities have also established Complete Count Committees (CCCs), including Anaheim, Costa Mesa, Garden Grove, Huntington Beach, Irvine, Santa Ana, and Stanton (as of the printing of this report). City CCCs are significant contributors to Census promotion by bringing diverse representation and stakeholders together; city CCCs also ensure a coordinated effort from and within a city.

A fair, accurate and complete Census is essential to our democracy. The Census impacts all of us — data compiled from these decennial surveys are a public good and vital for building healthy, vibrant communities. Over these next several months, it's vital that we raise awareness about the Census, make plans, coordinate efforts, and understand community needs and gaps that need to be addressed for a full Census count. Getting an accurate count is critical for Orange County and all of California.

*Mary Anne Foo, MPH; Executive Director,
Orange County Asian Pacific Islander Community Alliance (OCAPICA)*

COMMUNITY-BASED COLLABORATION: EQUIPPING TRUSTED MESSENGERS TO REACH THE HARD TO COUNT

Charitable Ventures of Orange County, a fiscal sponsor and nonprofit incubator launched in 2007, was awarded \$1.4M to serve as the Orange County Regional Administrative Community-Based Organization (Admin CBO), which is part of the California Complete Count - the statewide effort to increase Census participation. As the Admin CBO, Charitable Ventures is specifically working to engage the HTC communities in the Census, in partnership with the County of Orange and other nonprofits.

Charitable Ventures facilitates the OC Census Community Table, a cross-sector and multi-sector hub for coordination among nonprofits, foundations, government, service providers, academia, businesses and others to achieve a complete and accurate 2020 Census count for Orange County. As of July 2019, the Community Table numbered nearly 200 members representing 180+ different organizations.

The Community Table's Executive Team, in early 2019, constructed a State-approved, targeted strategy for use of public funds, using past Census data to identify exactly where Orange County's hardest HTC populations reside, and which nonprofit partners are best positioned to reach them with clear and culturally-competent messaging. In addition, part of the strategy is to seek out and retain in-kind and other resources being generated by the State and other stakeholders for specific HTC populations, including technical assistance, materials, messaging plans, and more. Charitable Ventures is also working with local, regional, and statewide philanthropic partners to raise an additional \$1 million to leverage both the regional plan and allocated State funds by enhancing outreach efforts and expanding community partnerships.

The Community Table Executive Team is comprised of the following organizations:

1. Access California Services
2. Community Action Partnership of Orange County
3. First 5 Orange County
4. NALEO (National Association of Latino Elected and Appointed Officials) Educational Fund
5. Orange County Asian and Pacific Islander Community Alliance (OCAPICA)
6. Orange County Congregation Community Organization (OCCCO)
7. Orange County Community Foundation
8. Orange County Grantmakers
9. Orange County Human Relations
10. Orange County United Way
11. The California Endowment



2020 CENSUS

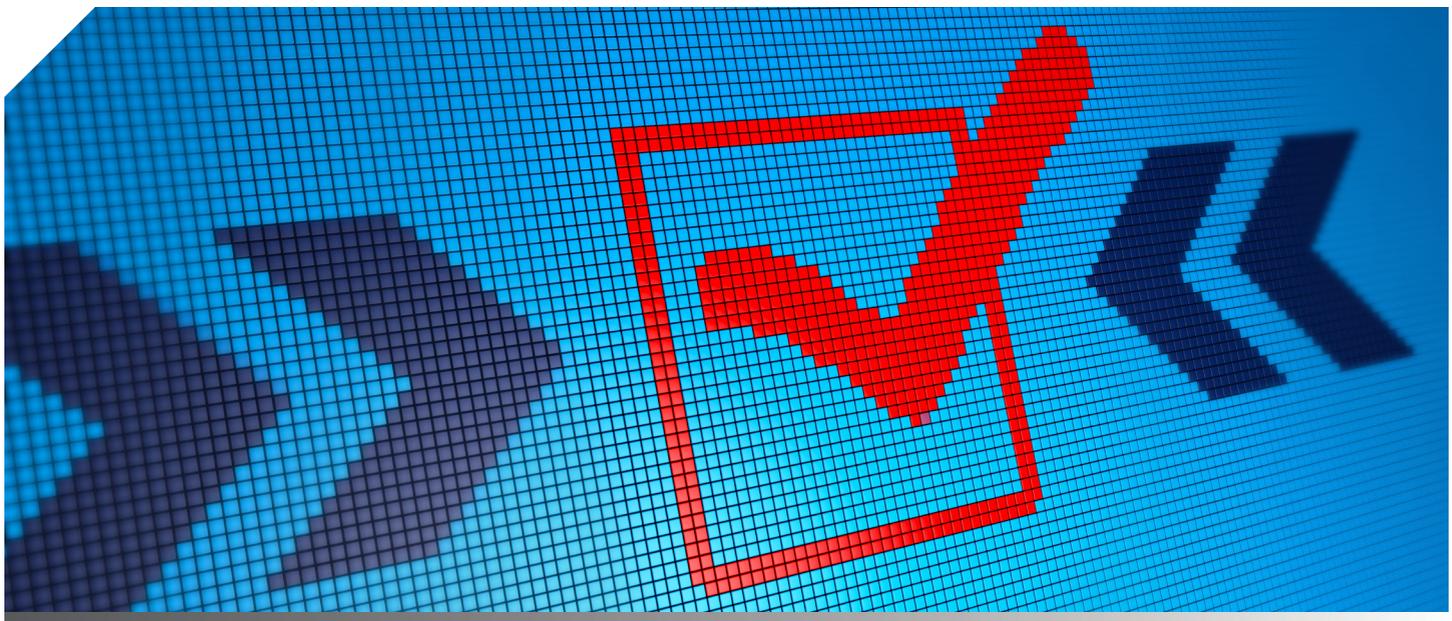
COMMUNITY-BASED STRATEGIES FOR INCREASING CENSUS PARTICIPATION

Charitable Ventures and the OC Census Community Table will build a communication network, provide resources to educate partners across the County on the importance of the Census, and promote active involvement to ensure a complete count. For example, to train and provide technical assistance to the collaborative, Charitable Ventures and the OC Census Executive Team have selected Asian Americans Advancing Justice - Los Angeles and the NALEO Educational Fund to work with the collaborative from fall 2019 through early 2020. Other strategic activities include the following:

- Recruit, train and deploy trusted messengers, in-language, for one-on-one conversations with HTC populations as well as a “Get-Out-The-Count Campaign”;
- Develop and disseminate regional Census promotional materials with culturally and linguistically appropriate messages;
- Plan and execute a media launch in diverse markets and a public education strategy;
- Raise funds to support a philanthropic collaborative that will give grants to CBOs performing Census outreach;
- Provide technical assistance via Questionnaire Assistance Programs (QACs), Census Assistance Kiosks (CAKs), sub-contractors and partners;
- Set up special events or partner with other organizations’ events, such as community events/fairs and presentations, education events, and other community forums;
- Develop a 2020 Census community activity calendar, in which CBOs choose a month in which they will sponsor Census activities or promote Census awareness;
- During the Non-Response Follow-Up period, the group will perform all of the above activities on a targeted, rapid-fire basis to those that have not responded; and
- Repurpose outreach materials developed for the HTC communities for countywide distribution through leveraged, in-kind partnerships.

The overall marketing strategy has four main priorities:

- Encouraging HTC residents, especially those lacking Internet access, to use kiosks set up at community centers and other locations;
- Building awareness of the 2020 Census and its value to Californians;
- Outreach to HTC communities, especially non-English speakers, via paid and non-paid media; and
- Supporting and promoting key national, state and county-level Census messages.





MOBILIZING TO MAKE A DIFFERENCE

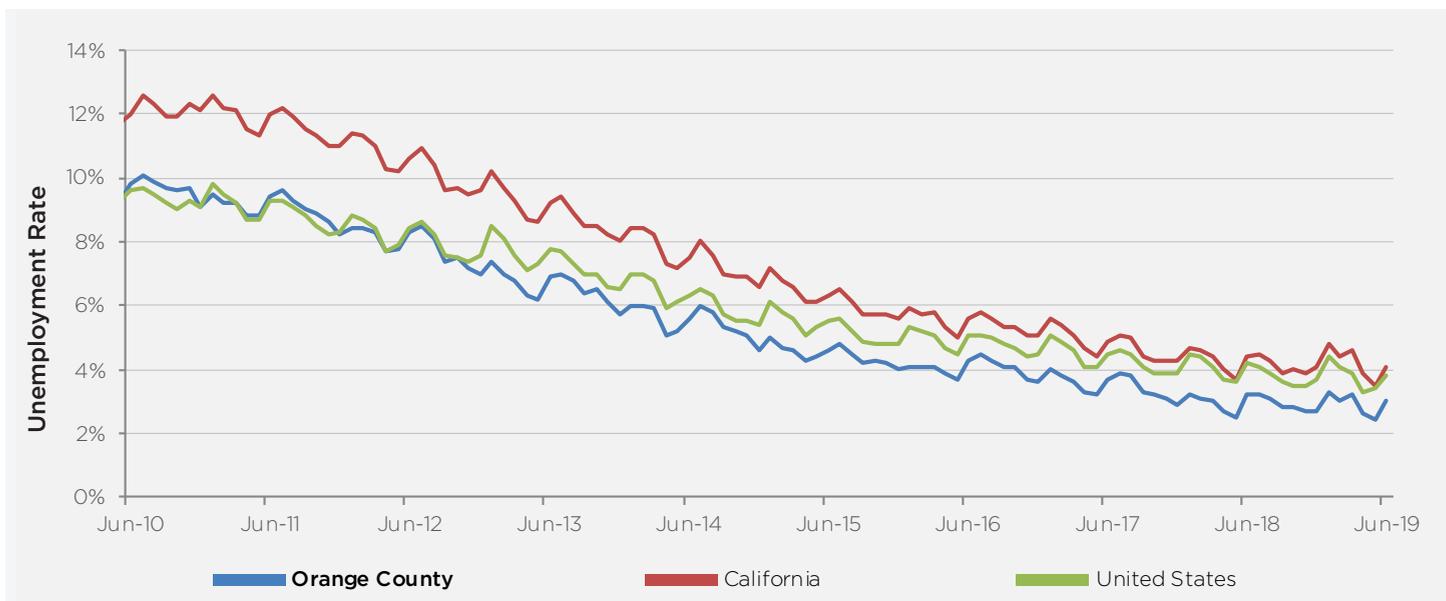
Census 2020 provides Orange County with a once-a-decade opportunity for collaboration – an opportunity to obtain the most accurate demographic data on the county and increased federal funding for vital programs, especially for the county’s least privileged residents. When people are asked what issues they care most about, accurately counting people may not rise above things like education, the economy, or the environment. But, as this feature has illuminated, an accurate count deeply impacts all these issues and more. This is why state, county, cities, and community organizations are mobilizing to ensure we do not miss this tremendous opportunity, and responsibility, to count all residents. By doing so, we can help the county take an important step towards a bright future.

EMPLOYMENT

Orange County's unemployment rate was 3.0 percent in June 2019, a year-over-year decrease of 0.2 percent but an increase of 0.6 percent over the previous month. This latest monthly increase was largely due to decreases in education employment for summer recess, a seasonal factor which happens annually. Orange County continues to outperform state and national unemployment rates of 4.2 percent and 3.8 percent, respectively. Total nonfarm employment rose to 1,673,100, an increase of 24,100 jobs compared to June 2018.

UNEMPLOYMENT RATES NEAR HISTORIC LOWS AS LABOR MARKET REMAINS STRONG

Unemployment Rate in Orange County, California and United States, 2010-2019



Source: California Employment Development Department, Bureau of Labor Statistics

Building a better future for Orange County

At UCI we transform science into solutions, spur job growth, improve health and wellness, and illuminate the power of the arts – all while providing bright students from all backgrounds the opportunity to *Shine Brighter*.

UCI is proud to be a part of this thriving community and to be considered one of the world's premier universities, generating \$5 billion in annual economic impact for Orange County and helping create a brilliant future for all.

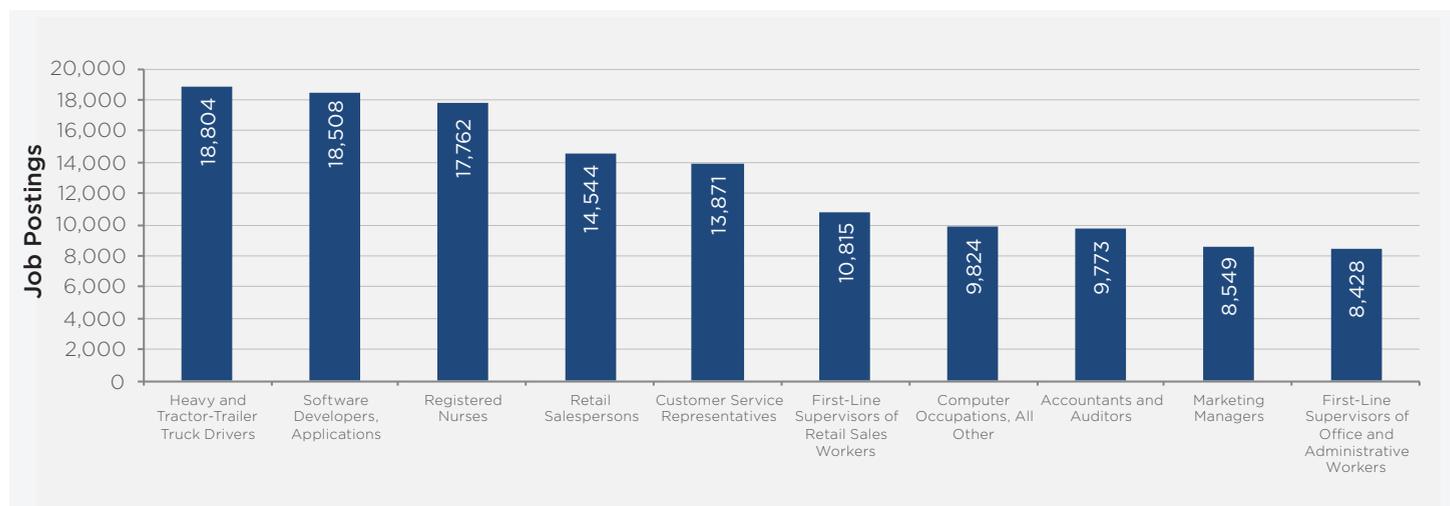
University of California, Irvine
uci.edu



Orange County had approximately 563,588 unique job postings between April 2018 and April 2019, with a median posting duration of 32 days. These job postings were concentrated in major job centers such as Irvine (129,828), Santa Ana (60,945) and Anaheim (55,680) and employers with the most postings included Anthem, Inc. (13,082), the University of California (7,244), and Allied Universal (6,273). The most in-demand occupations, measured by the number of job postings, reflect Orange County's growing industries including Information Technology and Healthcare, with Software Developers, Applications and Registered Nurses being highly sought after by regional employers, as seen in each profession's significant number of job postings between April 2018 and April 2019.

INFORMATION TECHNOLOGY AND HEALTHCARE WORKERS ARE IN-DEMAND

Most In-Demand Occupations in Orange County by Job Postings, April 2018 – April 2019



Source: California Employment Development Department, Bureau of Labor Statistics

\$ ECONOMY

Ten Orange County industry clusters tracked by the Community Indicators Report account for approximately half of all county jobs. The four largest industry sectors all saw significant growth between 2010 and 2018:

- Construction (+ 44.0 percent);
- Hospitality and Tourism (+ 30.2 percent);
- Health Services (+ 22.5 percent); and
- Business and Professional Services (+ 22.2 percent).

Two smaller industry clusters, Biomedical and Computer Software, saw growth between 2010 and 2018. These sectors grew by 29.4 percent and 41.1 percent, respectively.

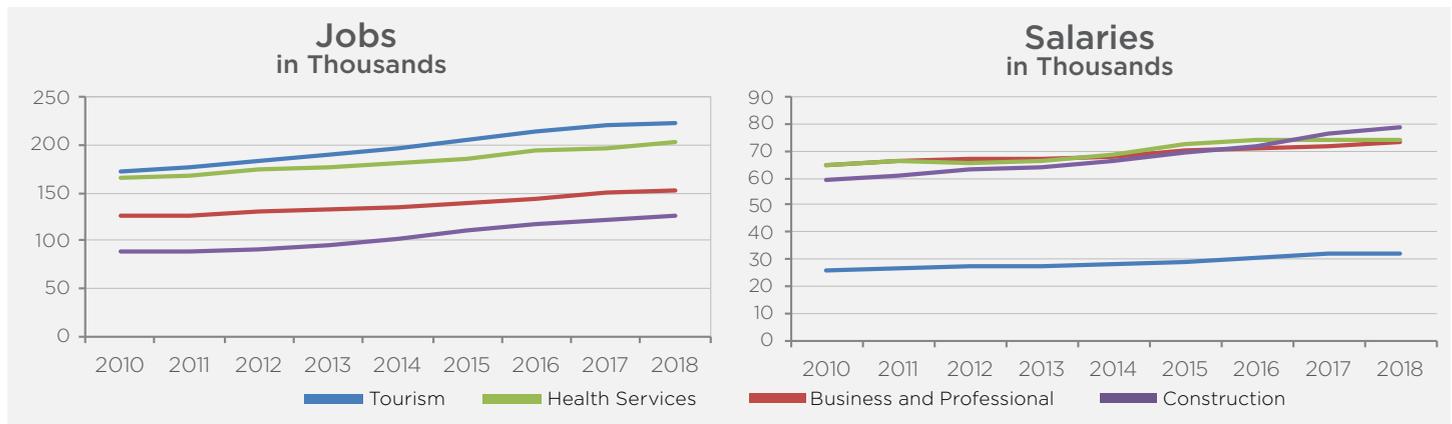
All sectors saw salary growth between 2010 and 2018. The fastest growth occurred in Computer Hardware (34.6 percent), Construction (32.8 percent) and Tourism (26.2 percent).

Over the past year, industries with the fastest salary growth included:

- Computer Hardware, which saw the fastest salary growth (8.7 percent);
- Defense and Aerospace (3.7 percent);
- Construction (3.3 percent); and
- Business and Professional (2.4 percent).

JOB AND SALARY GROWTH CONTINUES IN FOUR LARGE SECTORS

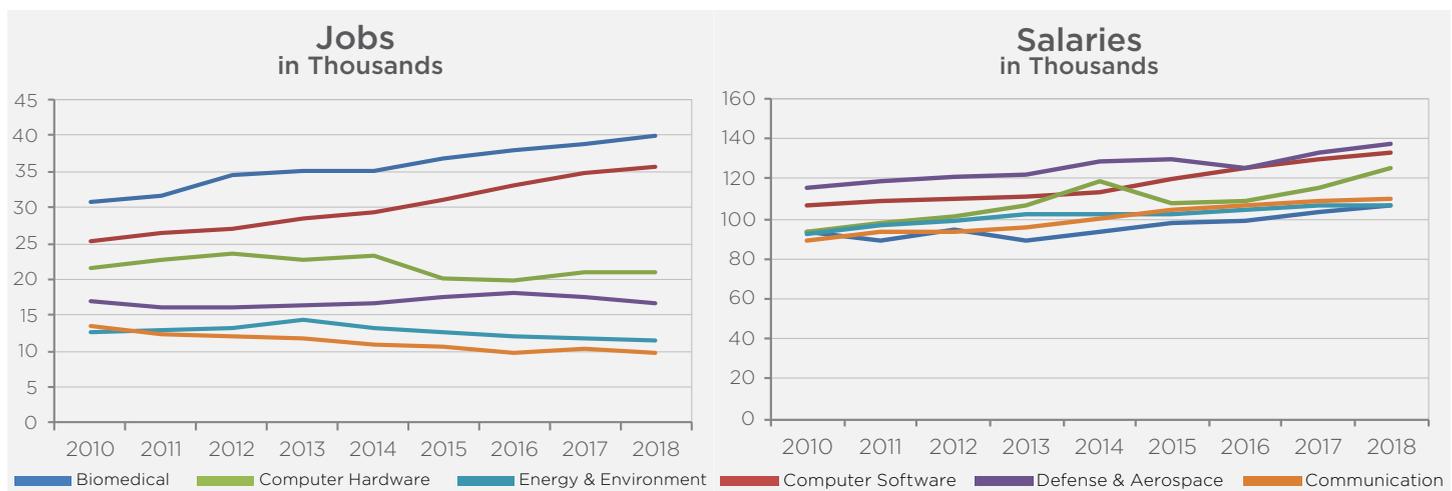
Employment and Average Salaries in Orange County Clusters with More than 40,000 Jobs, 2010-2018



Sources: California Employment Development Department; U.S. Inflation Calculator, reporting Consumer Price Index (CPI-U) data provided by the U.S. Department of Labor, Bureau of Labor Statistics

AMONG SMALLER SECTORS, BIOMED AND SOFTWARE DRIVE JOB GROWTH; SALARY GROWTH OUTPACES INFLATION

Employment and Average Salaries, Orange County Clusters with 40,000 Jobs or Fewer, 2010-2018

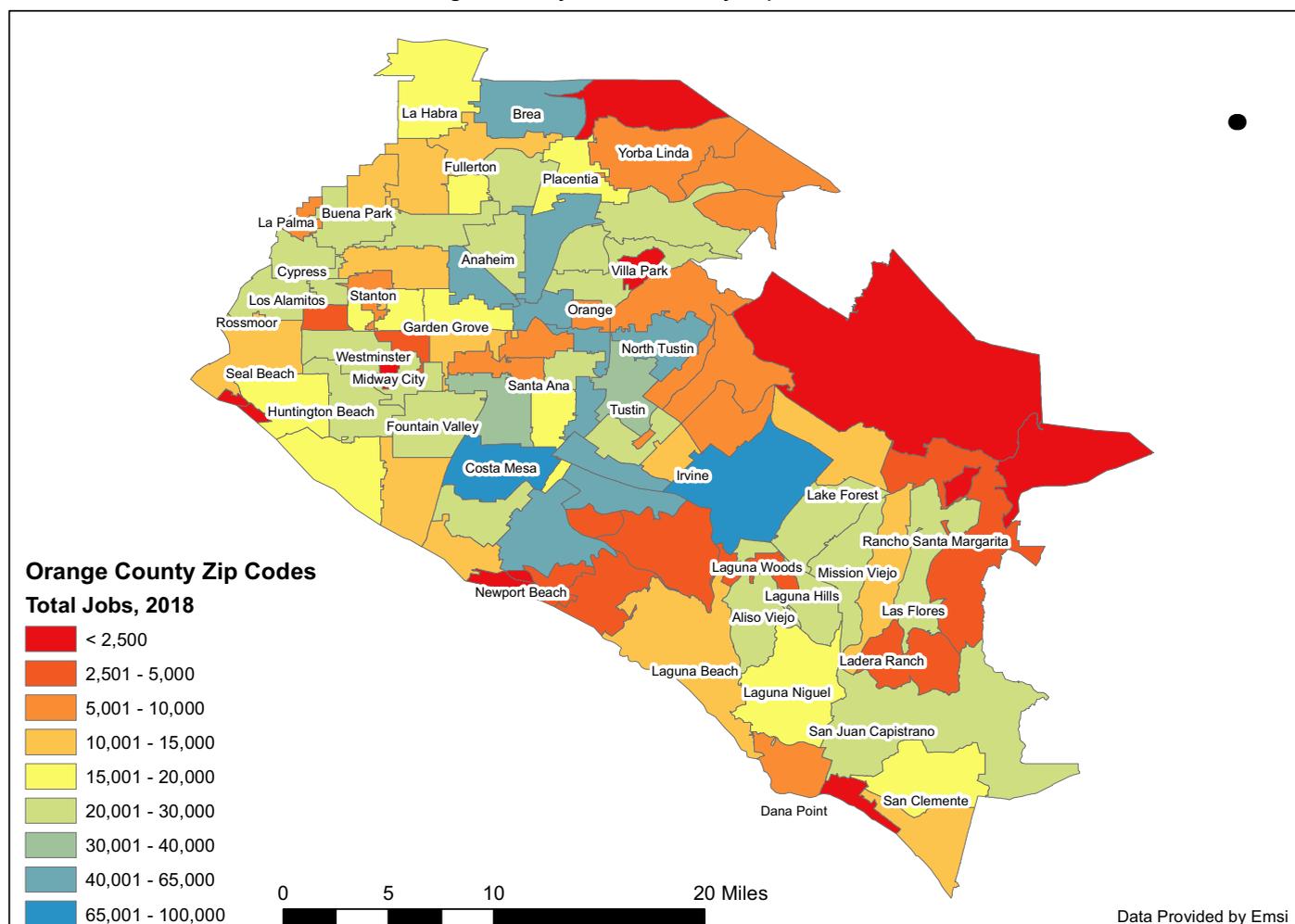


Sources: California Employment Development Department; U.S. Inflation Calculator, reporting Consumer Price Index (CPI-U) data provided by the U.S. Department of Labor, Bureau of Labor Statistics

JOBS CONCENTRATED IN IRVINE, SANTA ANA, AND ANAHEIM

Orange County's labor market is concentrated in central cities such as Irvine, Costa Mesa and Anaheim, leading to a large mismatch between employment opportunities and available housing units. This, in turn, means that not all workers are able to live where they work, an issue that creates further problems such as traffic congestion. Many workers in Orange County commute from less expensive areas such as Riverside and San Bernardino counties. Orange County's largest job centers include Irvine (161,257 commuters), Orange (46,695 commuters), Newport Beach (42,804 commuters), Costa Mesa (38,053 commuters) and Brea (25,692 commuters). A high number of commuters increases traffic congestion, which, in turn, reduces the overall quality of life, increases vehicle maintenance costs, and puts additional pressure on transportation infrastructure. Commuter patterns are further explored in the Transportation section of this report. Anaheim notably only had 4,103 commuters in 2018, suggesting the city has a good balance between workforce housing and job opportunities.

Orange County Total Jobs by Zip Code, 2018



\$ ECONOMY

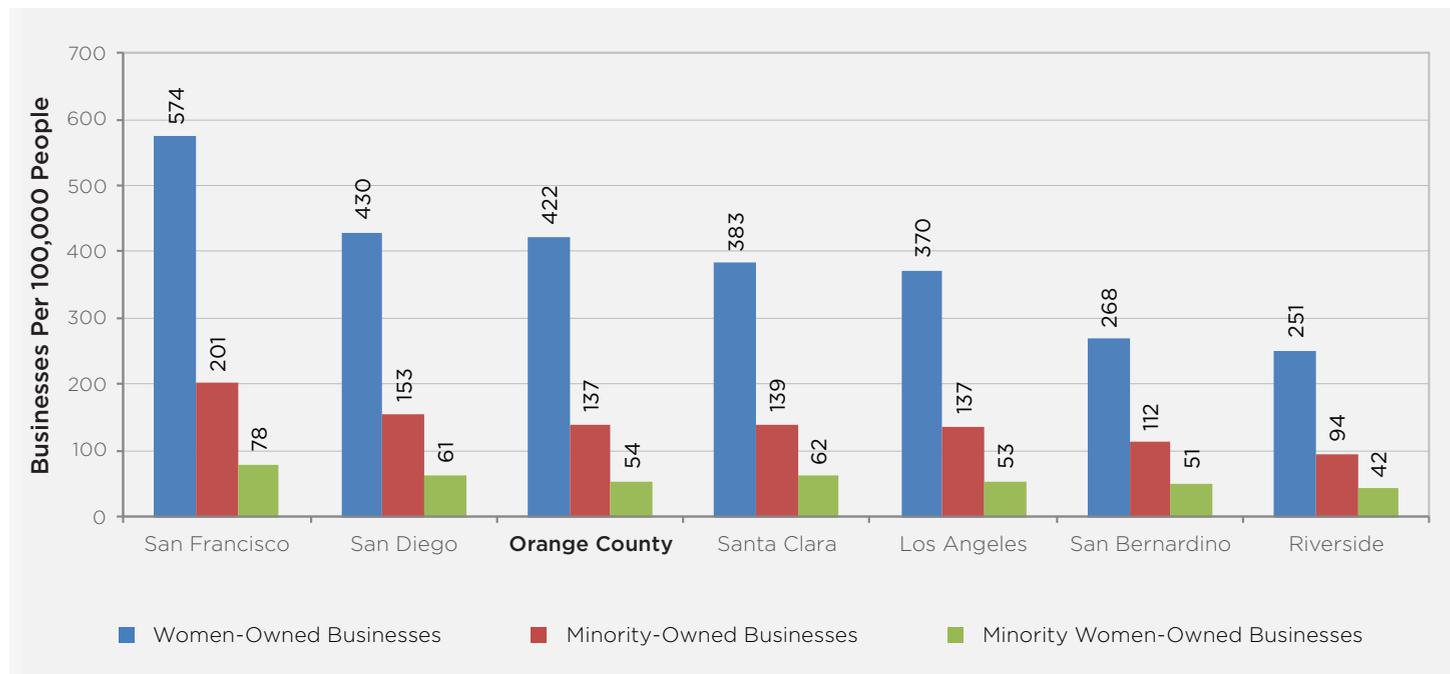
DIVERSITY IN BUSINESS

Orange County is second among its neighbors, behind only San Diego County, for the number of women- and minority-owned businesses per capita. While trailing Santa Clara in minority- and minority women-owned businesses, Orange County had significantly more women-owned businesses per 100,000 people in 2019.



WOMEN AND MINORITY-OWNED BUSINESSES HAVE A STRONG PRESENCE IN OC

Regional Comparison of Women-Owned, Minority-Owned and Minority Women-Owned Businesses per 100,000 People, 2019



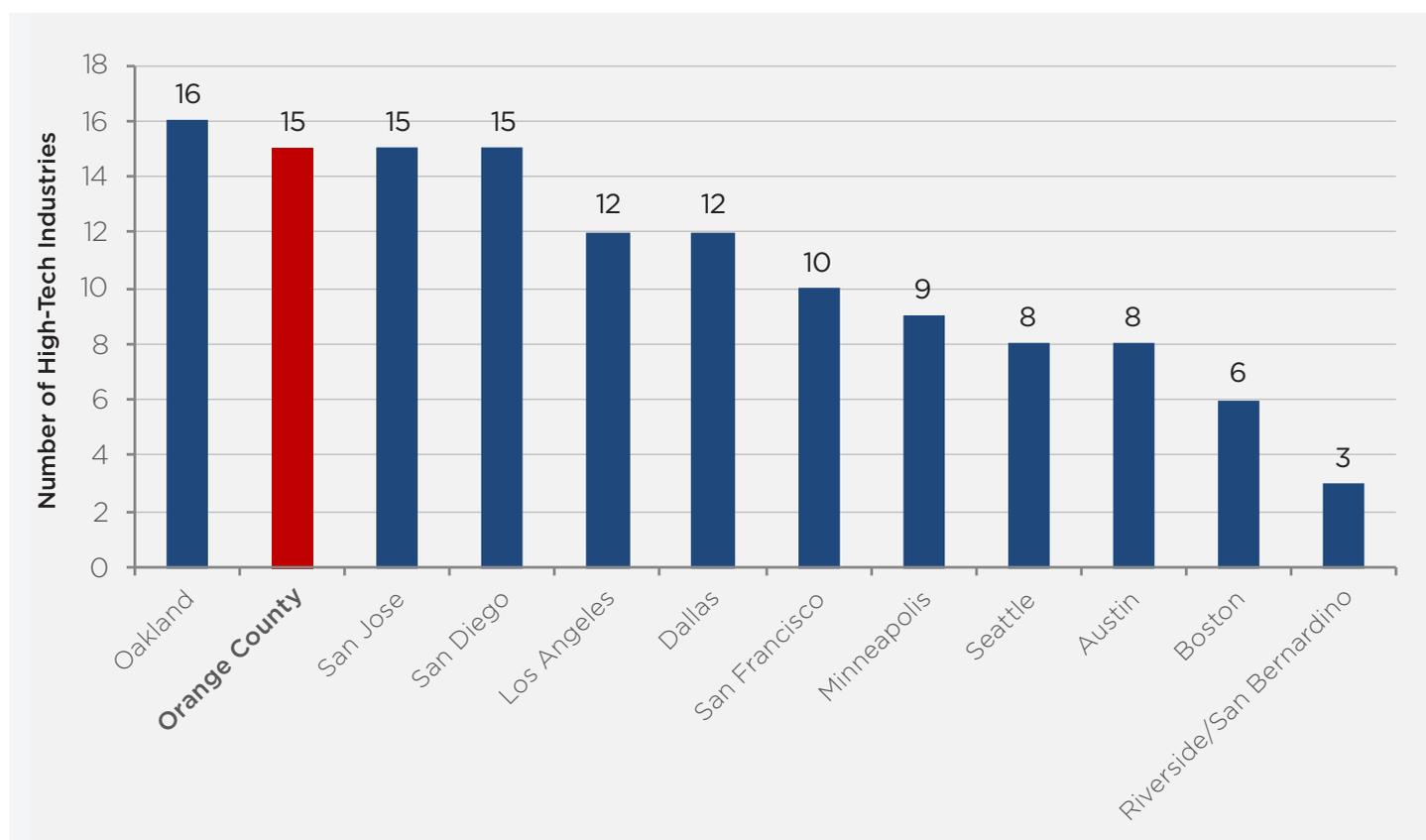
Source: Dun and Bradstreet, Market Insight

HIGH-TECH DIVERSITY AND GROWTH

Orange County has higher-than-average employment concentration in 15 out of 19 high-tech industries, second only to Oakland and tied with tech hubs such as Boston and San Jose. Orange County's high-tech sector had a one-year output growth rate of 102.5 and a five-year output growth rate of 105.3, both well above the national average of 100.0 for both time periods.

ORANGE COUNTY REMAINS TIED AT 2ND WITH SAN JOSE AND SAN DIEGO FOR MOST DIVERSE HIGH-TECH SECTOR

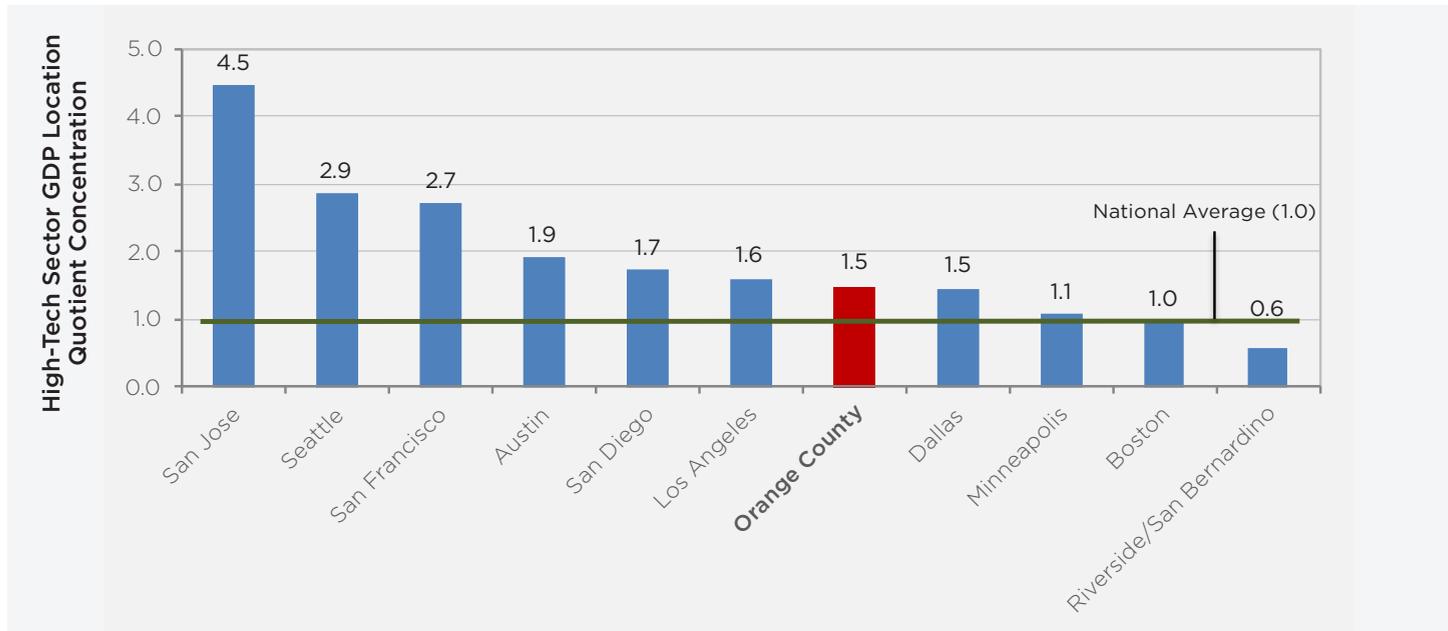
Number of High-Tech Industries with Employment Above the National Average (out of 19 total industries) in Orange County Compared to 200 Metro Areas (Top Ranked and Selected Peers Shown), 2018



Source: Milken Institute, Best Performing Cities Report

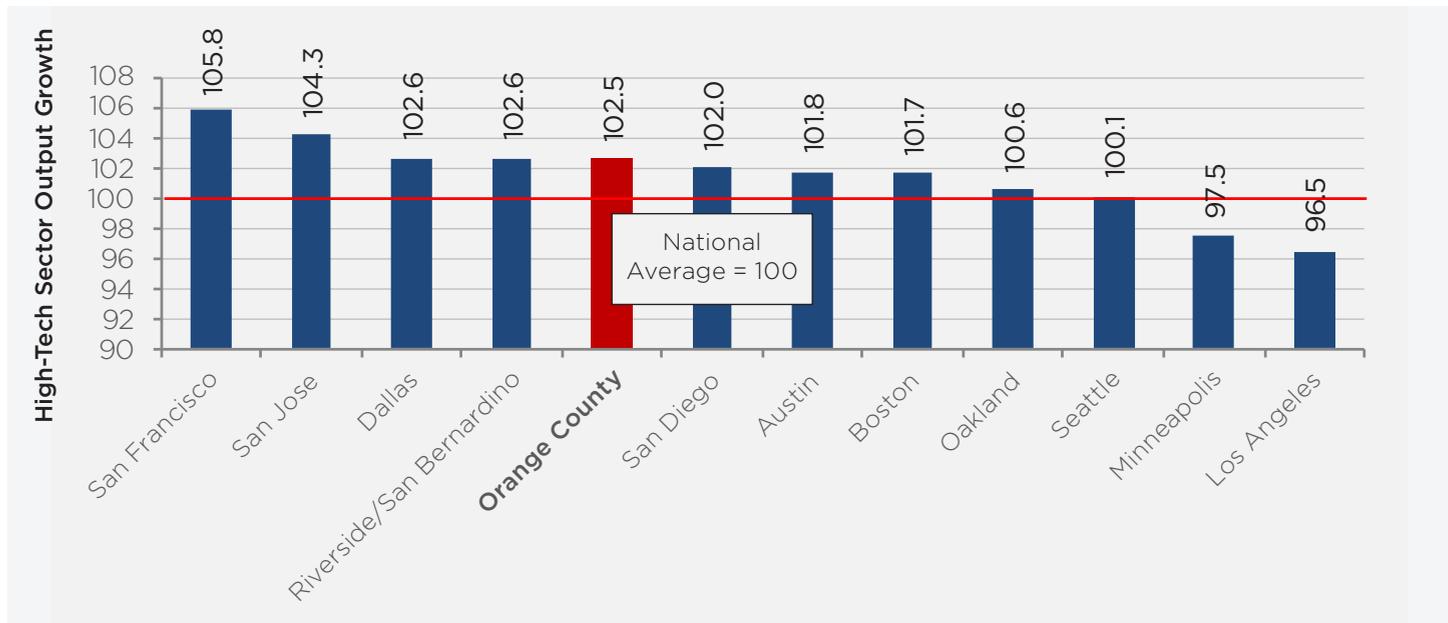
ORANGE COUNTY OUTPERFORMS NATION IN HIGH-TECH GDP GROWTH

1-Year Relative High-Tech Sector GDP Location Quotient Concentration in Orange County compared to Peer Metro Areas, 2018



Source: Milken Institute, Best Performing Cities Report

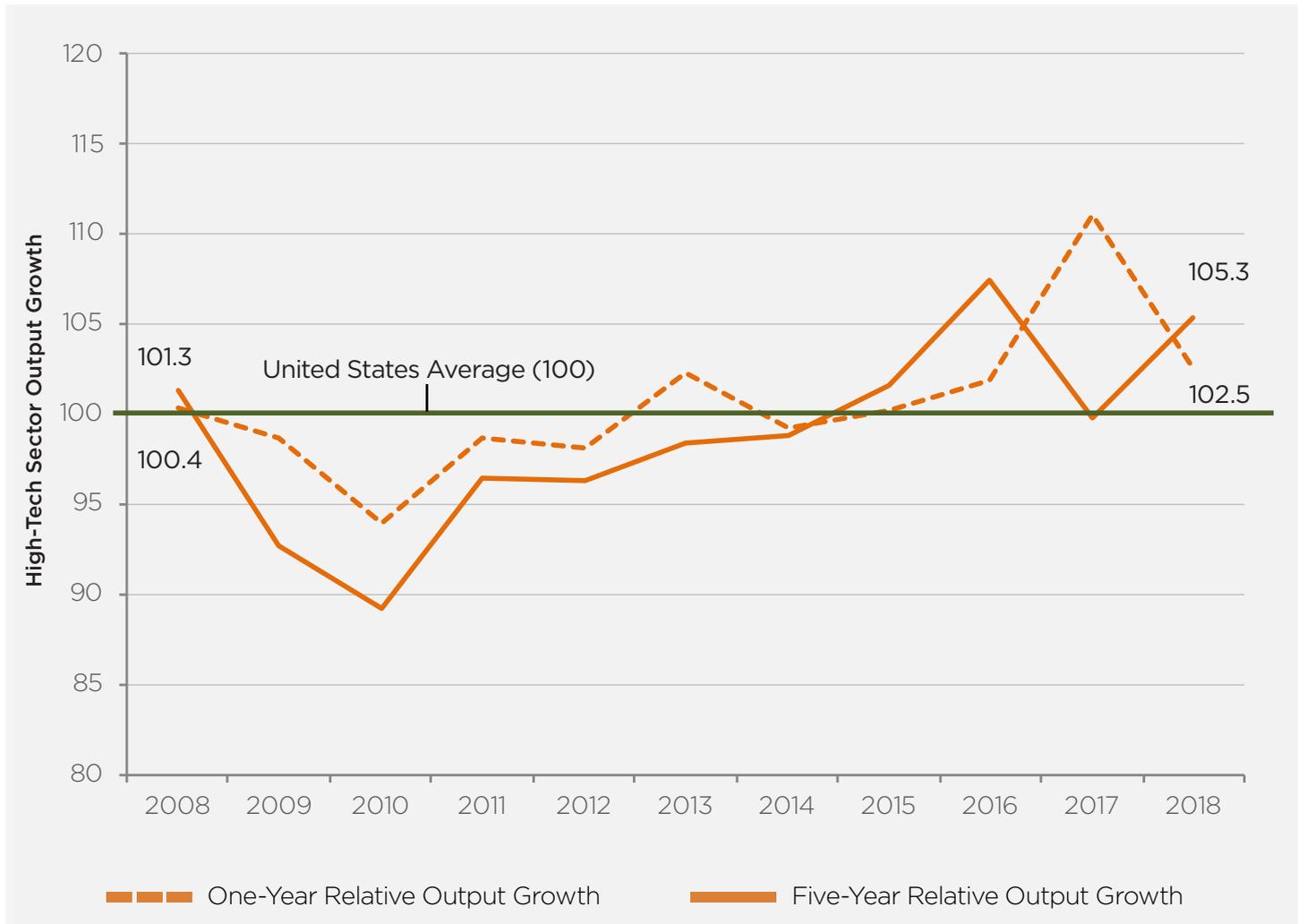
Regional Comparison of High-Tech Sector Output Growth Relative to National Average, 2018



Source: Milken Institute, Best Performing Cities Report

ORANGE COUNTY'S ONE-YEAR AND FIVE-YEAR GROWTH OUTPACES THE NATION

High-Tech Sector Output Growth in Orange County Relative to the National Average, 2008-2018



Source: Milken Institute, Best Performing Cities Report

Data Notes

The diversity of Orange County's high-tech economy is measured by counting the number of high-tech sector industries out of 19 that have employment concentrations above the national average. Employment concentration is relative to a national average of 1.0, where results below 1.0 signal lower employment in a particular industry than the national average and results above 1.0 signal greater employment in a particular industry than the national average. High-tech sector output growth is relative to the national average of 100.0.

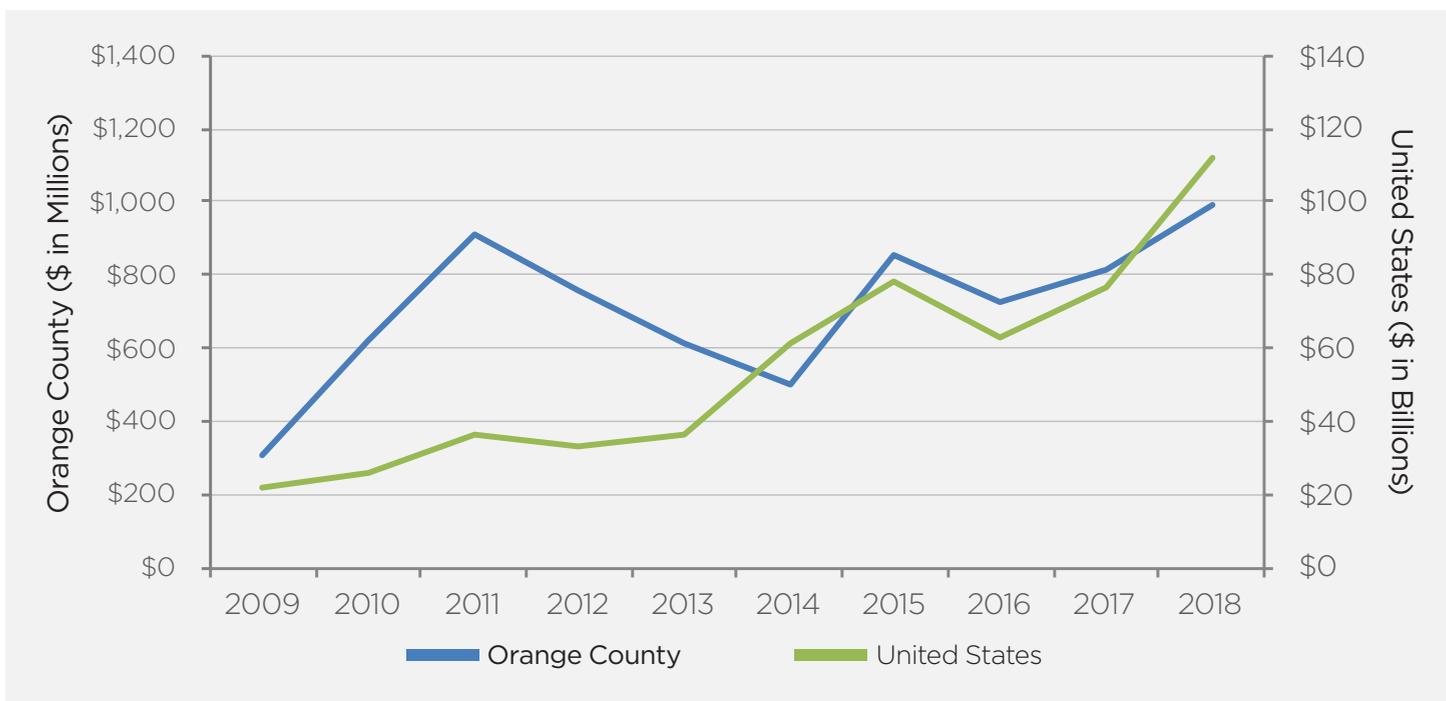
INNOVATION

Orange County businesses received \$987 million in venture capital (VC) funding in 2018, nearly \$171 million or 21 percent more than the previous year's total. US venture capital funding increased by \$35 billion or 46 percent over the same time period, reaching a total of \$112.1 billion. Since 2009, when Orange County VC funding totaled \$308 million, county investments have increased by \$679 million or by 221 percent.

The county's Business Products and Services sector received the most VC investment at \$250 million, followed by Internet Software and Services at \$154 million and Aerospace and Defense at \$140 million. Irvine had the highest funding totals at \$356 million, followed by Aliso Viejo at \$302 million and Huntington Beach with \$140 million. The presence of UST Global, an IT services consultant and provider, boosted funding in Aliso Viejo; 22 deals, primarily focused in Internet Software and Healthcare, helped keep Irvine the region's top destination for VC funding.

ORANGE COUNTY VENTURE CAPITAL INVESTMENTS REACH DECADE HIGH

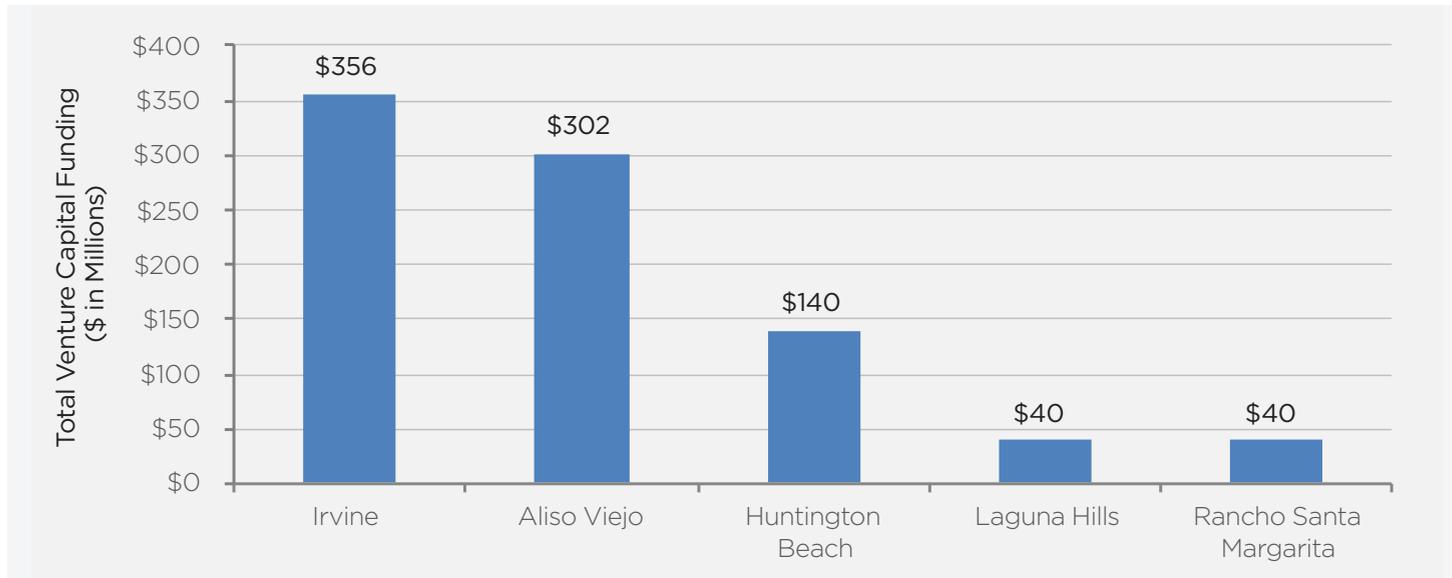
Total Venture Capital Investment in Orange County and United States, 2009-2018



Source: OCBC analysis of CB Insights database; Includes only private, VC-backed funding. Does not include debt or grant financing

IRVINE AND ALISO VIEJO EACH DRAW OVER \$300 MILLION IN PRIVATE INVESTMENTS

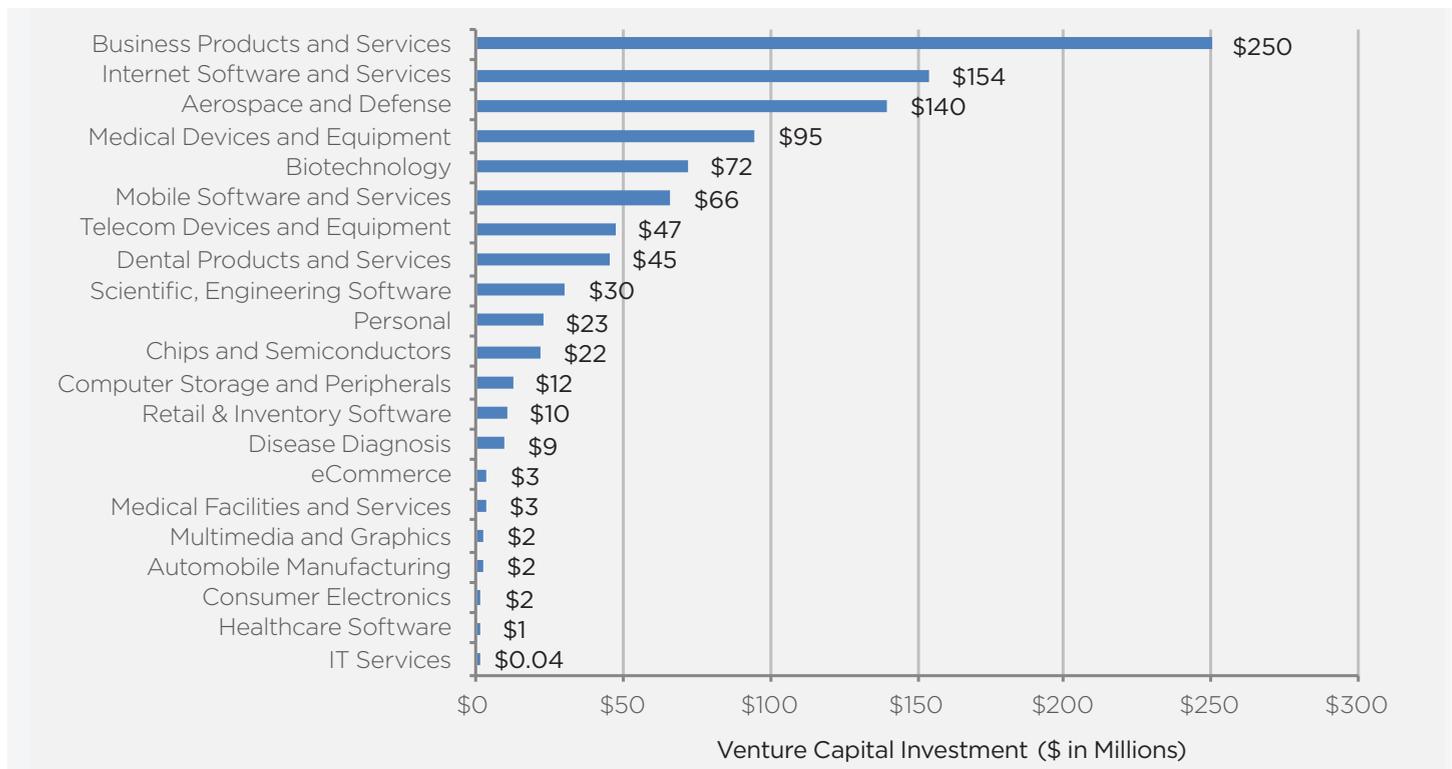
Top 5 Orange County Cities by Venture Capital Funding, 2018



Source: OCBC analysis of CB Insights database; Includes only private, VC-backed funding. Does not include debt or grant financing

VC FUNDING FOCUSED IN BUSINESS PRODUCTS, INTERNET, AEROSPACE, MEDICAL DEVICES AND BIOTECHNOLOGY

Venture Capital Investment in Orange County by Industry Sector, 2018



Source: OCBC analysis of CB Insights database; Includes only private, VC-backed funding. Does not include debt or grant financing.

\$ ECONOMY

Orange County's fastest growing companies included Nexem Corporation, a privately-owned staffing company providing workforce solutions located in Newport Beach, and ICU Medical Incorporated, a publicly-owned medical technology company located in San Clemente. The largest and fastest growing private company in the region was Allied Universal which employed 4,015 residents while expanding by 155 percent over the past two years. The county's largest and fastest growing public company was Edwards Lifesciences Corporation, which employed over 4,500 residents while increasing revenue by 29 percent over the last two years.

2,000% TWO-YEAR GROWTH IN ORANGE COUNTY'S FASTEST-GROWING PRIVATE COMPANY

Fastest-Growing Private Companies in Orange County by Two-Year Revenue Growth, 2019

Company Name	Two-Year Revenue Growth	Revenue in the Past 12 Months	Orange County Employees
Nexem Corp.	1933%	\$122 Million	64
Rand Technology	160%	\$112.1 Million	43
Allied Universal	155%	\$5.4 Billion	4,015
SA Recycling	152%	\$1.6 Billion	332
Alignment Healthcare	116%	\$533.8 Million	434
Passco Companies	87%	\$900.5 Million	53
Warmington Group of Companies	55%	\$203.3 Million	101
CoolSys	52%	\$350 Million	325
Accurate Background	48%	\$114 Million	349
Alliant Insurance Services Inc.	37%	\$1.2 Billion	307

Source: Orange County Business Journal, 2019 Book of Lists

FASTEST-GROWING PUBLIC COMPANIES REFLECT REGIONAL SPECIALTIES - HEALTHCARE, CONSTRUCTION AND MEDICAL DEVICES

Fastest-Growing Public Companies in Orange County by Two-Year Revenue Growth, 2019

Company Name	Two-Year Revenue Growth	Market Capitalization	Orange County Employees
ICU Medical Inc.	301%	\$5.4 Billion	225
William Lyon Homes Inc.	62%	\$485.7 Million	284
The New Home Co.	60%	\$143.1 Million	183
Edwards Lifesciences Corp.	29%	\$31.1 Billion	4,652
Ensign Group Inc.	28%	\$2 Billion	1,100
Masimo Corp.	28%	\$6 Billion	690
TRI Pointe Group Inc.	24%	\$26.6 Billion	224
Boot Barn Holdings Inc.	16%	\$785.8 Million	243
Chipotle Mexican Grill Inc.	15%	\$12.1 Billion	1,123

Source: Orange County Business Journal, 2019 Book of Lists



Thanks for making a difference in our community

Bank of America recognizes Orange County Business Council. Community leaders like you are a vital resource and inspiration to us all. Thanks to you, progress is being made and our community is becoming a better place to live and work.

Visit us at [bankofamerica.com/local](https://www.bankofamerica.com/local).

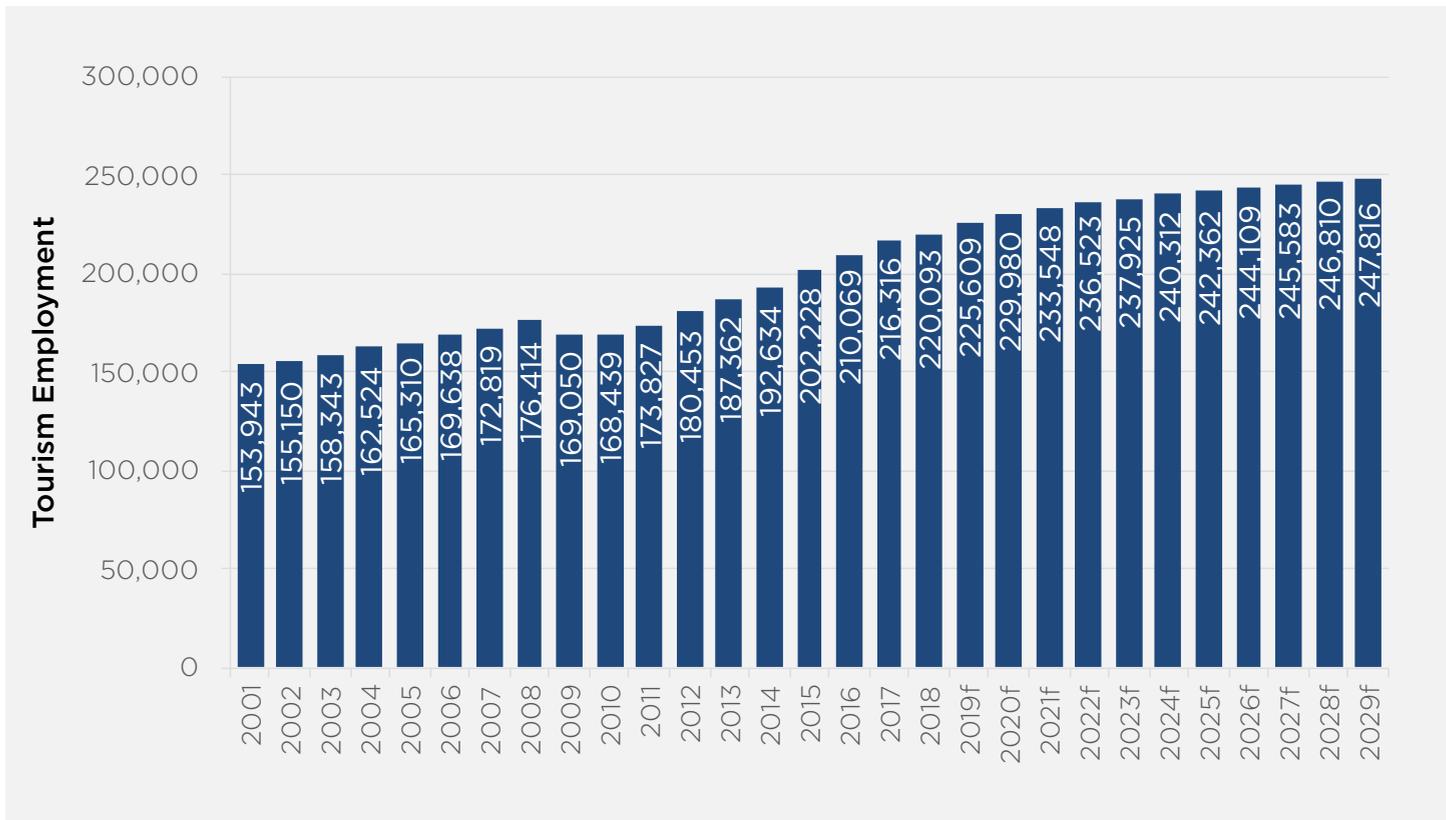


INTERNATIONAL MARKETPLACE

Tourism, one of the county's largest sectors, employed just over 220,000 workers in 2018, a 1.7 percent increase from the previous year; sector employment is expected to reach almost 248,000 by 2029.

TOURISM EMPLOYMENT CONTINUES TO CLIMB ALONGSIDE WAGES

Orange County Tourism Employment, 2001 - 2029f

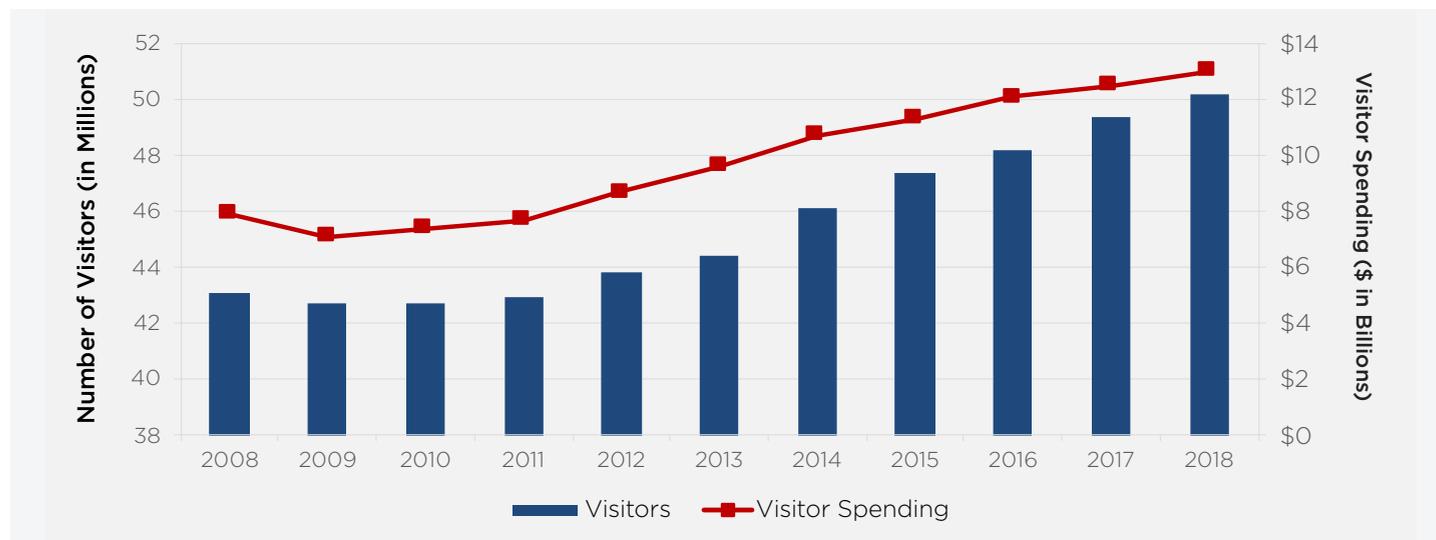


Source: Orange County Business Journal, 2019 Book of Lists

More than 50 million travelers visited Orange County in 2018, spending over \$13 billion, which represents a 4.2 percent increase from the year before. The county's tourism industry has been a consistent economic engine; according to CIC Research, visitor volume over the past ten years in Orange County has increased by 16.4 percent while visitor spending has increased by 64.5 percent. Anaheim is the county's tourism hub with popular attractions such as Disneyland, the Los Angeles Angels at Angel Stadium, and the Anaheim Ducks at the Honda Center. Orange County also boasts world-class shopping destinations such as South Coast Plaza, which has the nation's second highest sales per square foot ratio, 42 miles of famous coastline, music and arts festivals and other attractions.

ANNUAL VISITOR SPENDING TOPS \$13 BILLION

Orange County Total Visitors and Visitor Spending, 2008-2018



Source: CIC Research, Inc., 2018 Anaheim and Orange County Visitor Profile

Thanks to its incredible amenities and strong transportation links, Orange County has long attracted workers and businesses from around the world. The table below highlights the county's largest foreign-owned companies, showing their sector and total county employment. Orange County's largest foreign-owned companies represent a wide variety of sectors, from Aerospace to Banking to Consumer Electronics.

ORANGE COUNTY DRAWS BROAD RANGE OF FOREIGN COMPANIES

Foreign-Owned Companies in Orange County by Employment in Orange County, 2019

Company	Sector	Employment in Orange County	Parent Company	Country of Origin
Panasonic Avionics Corp.	Inflight Entertainment Systems	2,306	Panasonic Corp.	Japan
B. Braun Medical Inc.	Medical Product Manufacturing	1,709	B. Braun Holding GmbH & Co. KG	Germany
Oakley Inc.	Eyewear and Apparel	1,700	Luxottica Group SpA	Italy
Zodiac Aerospace	Aircraft Interiors	1,650	Safran	France
Broadcom Inc.	Semiconductor Products	1,630	Avago Technologies	Singapore
Pacific Investment Management Company	Investment Management	1,380	Allianz SE	Germany
Experian	Information Services	1,300	Experian PLC	Ireland
Thales Avionics Inc.	In-Flight Entertainment Systems	1,300	Thales Group	France
MUFG Union Bank	Bank	1,225	MUFG	Japan
Alcon Research Ltd.	R&D	1,100	Novartis	Switzerland
Canon U.S.A. Inc.	Office Products	1,032	Canon	Japan
MicroVention Inc.	Medical Device Manufacturer	1,000	Terumo Corp.	Japan
Schneider Electric	Energy Management	976	Schneider Electric SE	France
Ingram Micro Inc.	Technology Products	900	HNA Technology	China
Medtronic Neurovascular	Medical Device Manufacturer	900	Medtronic PLC	Ireland
T-Mobile USA Inc.	Cellphones	900	Deutsche Telekom	Germany
Karma Automotive	Electric Plug-In Vehicles	878	Wanxiang Group	China
TowerJazz	Water Foundry	820	Tower Semiconductor Ltd.	Israel
Toshiba	Consumer Electronics	700	Toshiba Corporation	Japan
Meggitt PLC	Defense Services	681	Meggitt PLC	United Kingdom

Source: CIC Research, Inc., 2018 Anaheim and Orange County Visitor Profile



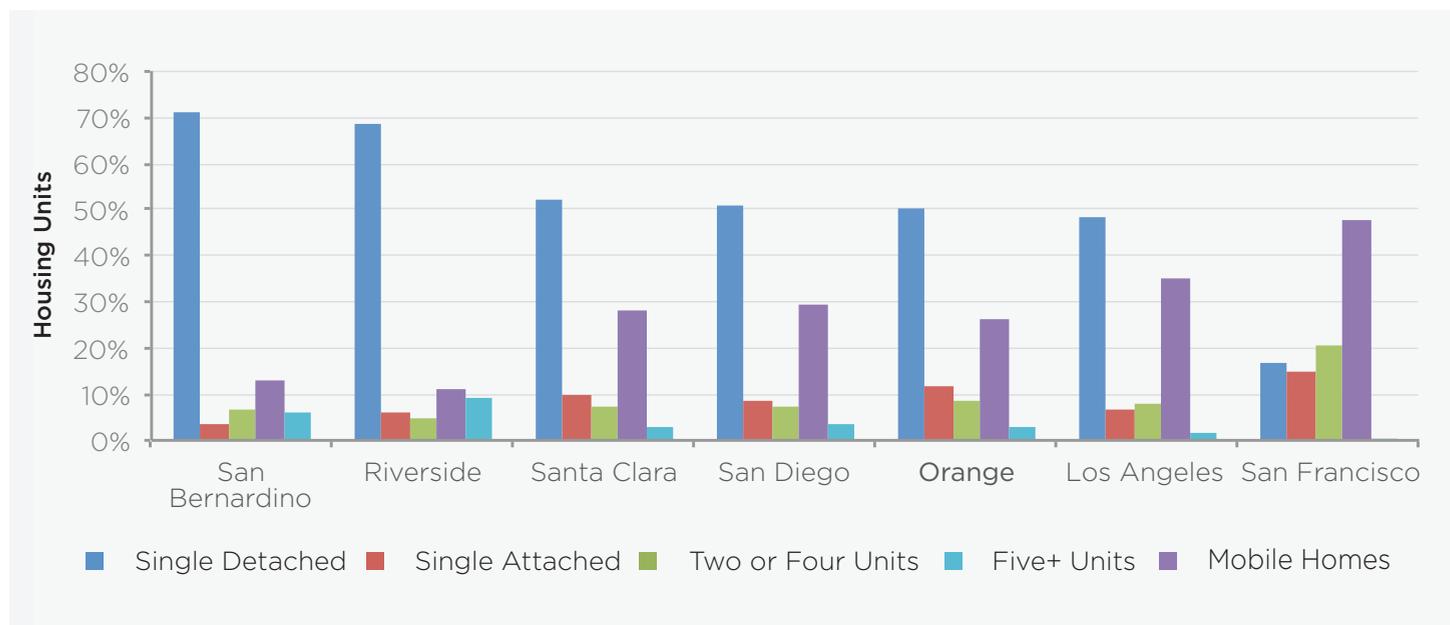
HOUSING

HOUSING LANDSCAPE

More than half (50.2 percent) of Orange County’s housing consists of single-family homes, the result of a trend stretching back decades; multiple-unit housing accounts for only 34.8 percent of the county’s housing structures. Similar trends are seen in all peer regions compared except San Francisco.

SINGLE DETACHED HOMES DOMINATE IN ORANGE COUNTY

Housing Structures by Type for Peer California Regions, 2019

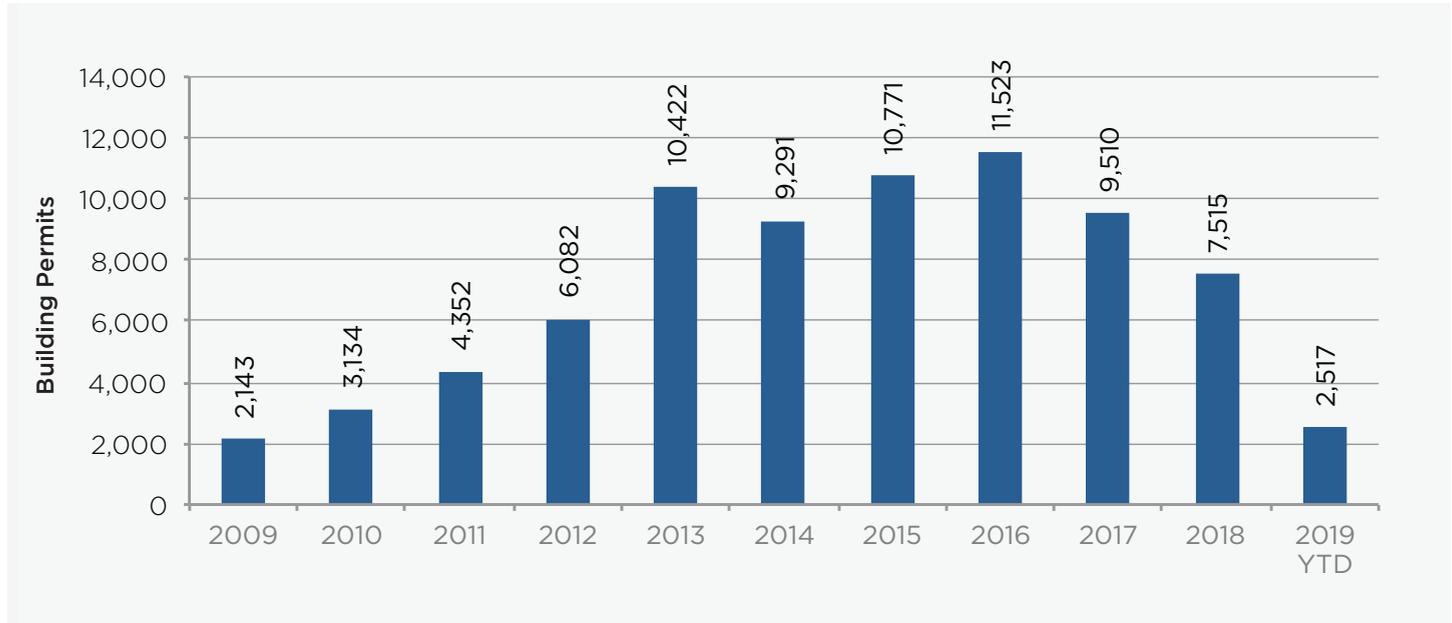


Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2011-2019. Sacramento, California, May 2019.

The dramatic effects of the Great Recession resulted in building permits dropping and staying low between 2008 and the beginning of 2010 before rising dramatically for the following six years. While home prices have continued to climb, building permits began to decrease on a monthly basis starting in 2017 as construction costs increased and moving housing projects through the local development review and approval process began to prove more difficult.

BUILDING PERMIT GROWTH SLOWS AFTER PEAKING IN 2016

Orange County Building Permit Monthly Trends, 2007-2019

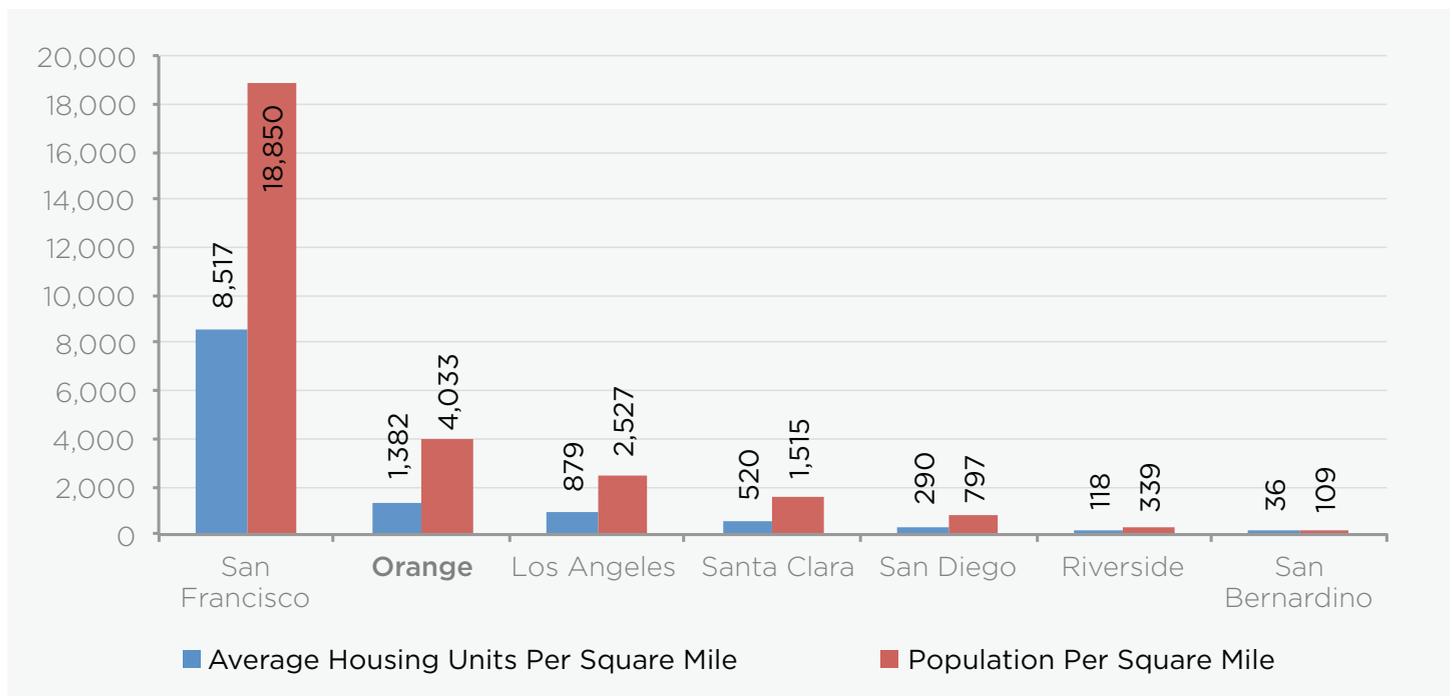


Source: U.S. Census Bureau's Building Permits Survey

Except for San Francisco, Orange County has the highest housing and population density of comparable regions. Overall, the county has approximately 1,382 housing units per square mile and 4,033 residents per square mile.

AMONG PEER COUNTIES, ORANGE COUNTY SECOND ONLY TO SAN FRANCISCO ON KEY DENSITY METRICS

Housing Unit and Population per Square Mile in Peer California Counties, 2019



Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2011-2019. Sacramento, California, May 2019.



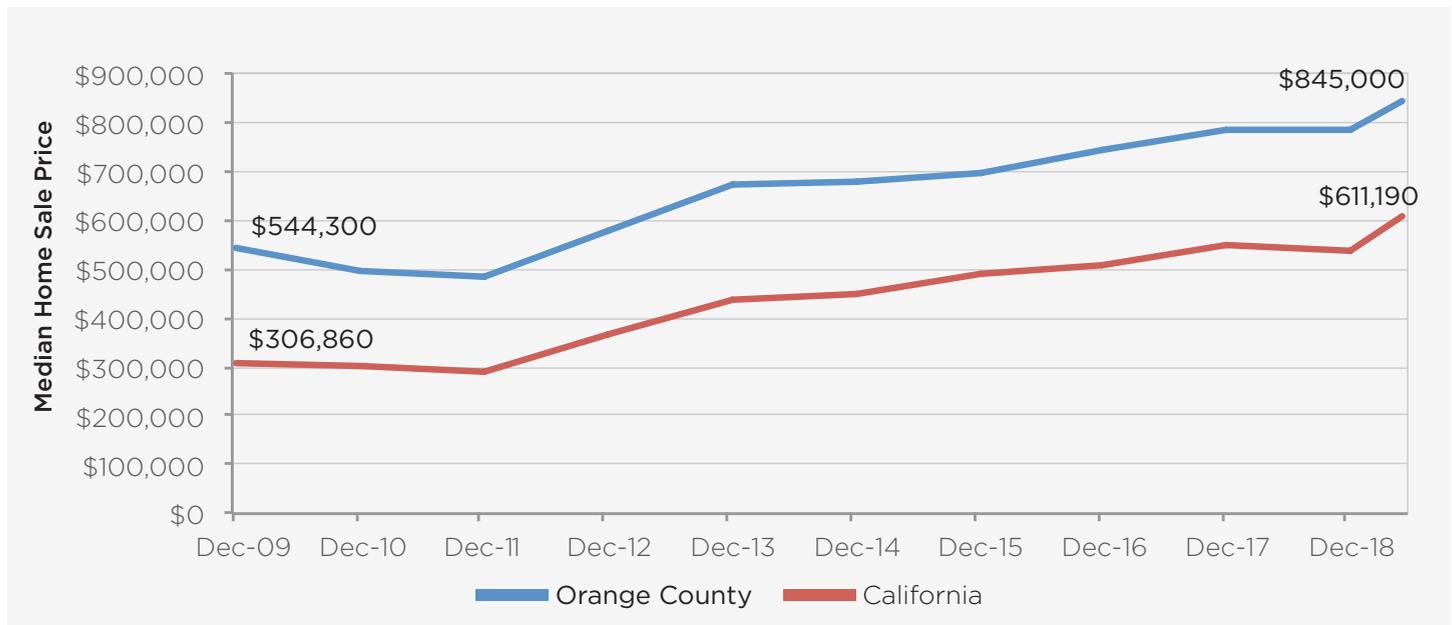
HOUSING

HOUSING AFFORDABILITY

Orange County’s median single family home price increased 44 percent in 10 years between December 2009 and December 2018, reaching a new high of \$845,000 in May 2019. A first-time home buyer would need a minimum qualifying income of approximately \$110,160 to afford an entry-level home (estimated at \$680,000) in 2019. Despite the recent jump in home prices, the percentage of first-time home buyers who can afford an entry-level home increased from 38 percent in the fourth quarter of 2018 to 42 percent in the first quarter of 2019. Still, the long-term trend is toward less affordable housing: only 42 percent of first-time buyers can afford an entry level home in 2019, compared with 50 percent 10 years ago.

LARGE FIRST-QUARTER JUMP IN HOME PRICES

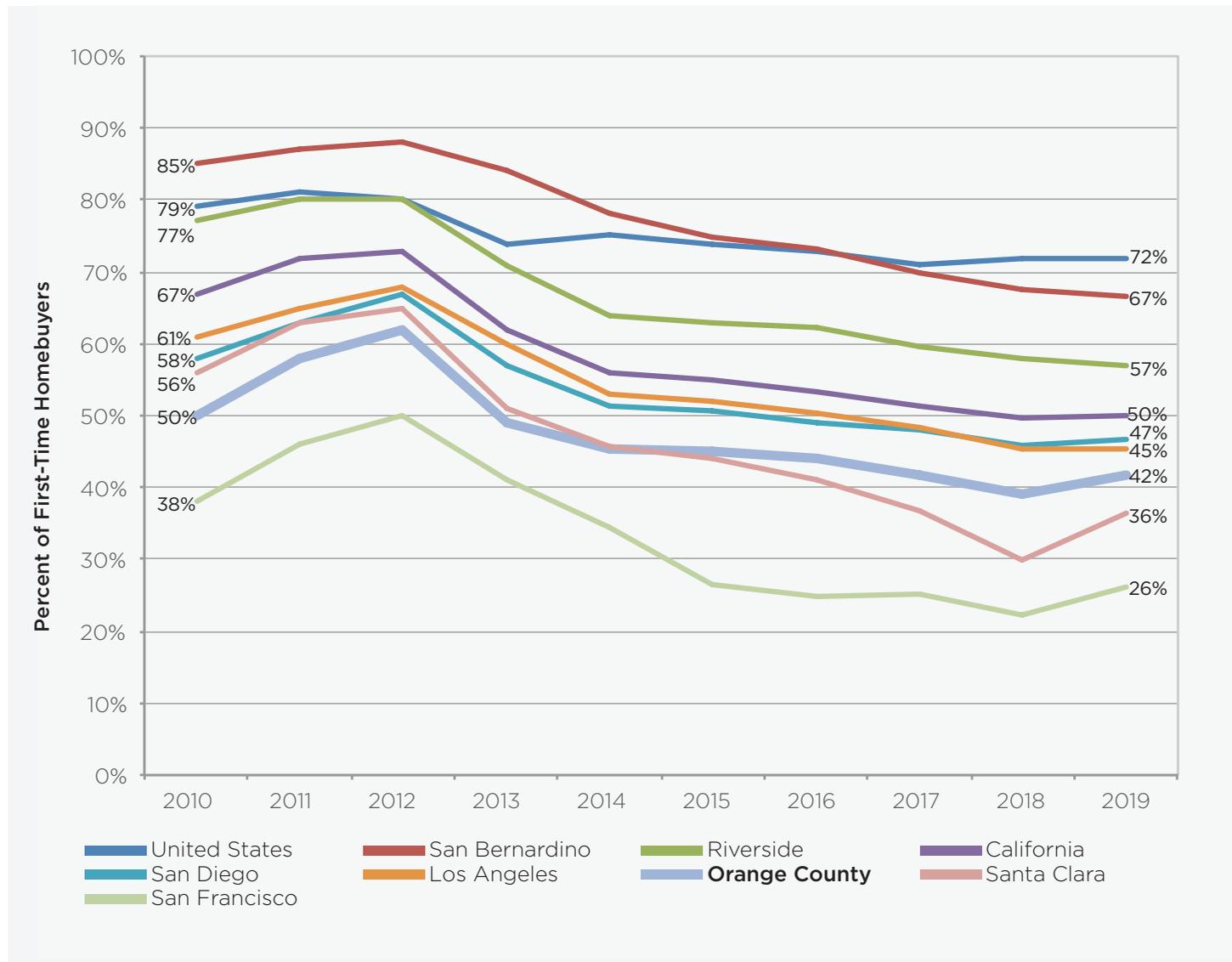
Median Existing Single-Family Home Sale Price in Orange County and California, December 2009-May 2019



Source: California Association of Realtors, Current Sales & Price Statistics

RECENT IMPROVEMENT IN OC'S HOUSING AFFORDABILITY; LONG-TERM CHALLENGE REMAINS

Regional Comparison of the Percentage of First-Time Homebuyers Able to Afford an Entry-Level Home, Q1 2010-Q1 2019



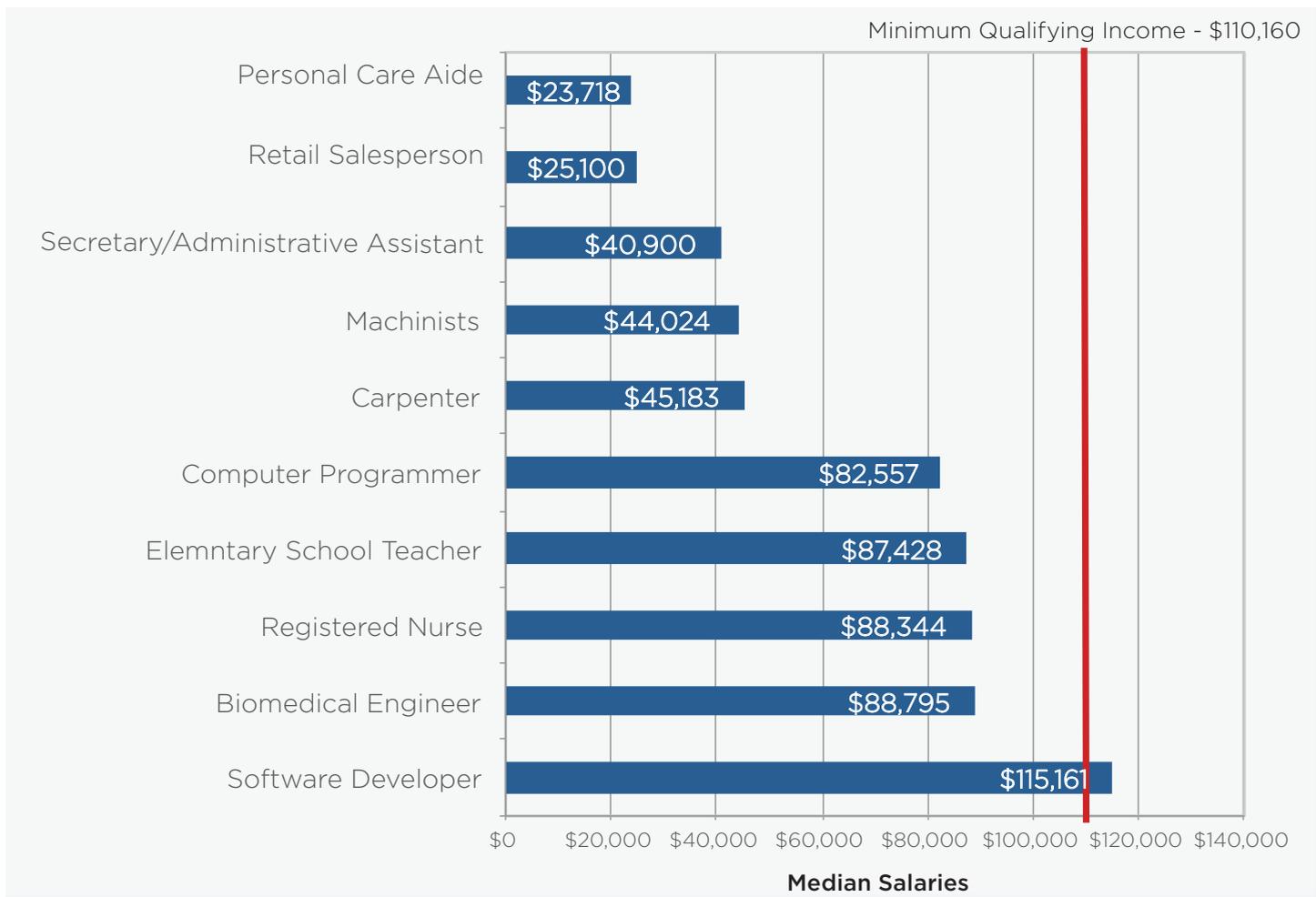
Source: California Association of Realtors, First-Time Home Buyer Affordability Index

HOUSING

Orange County's housing costs are rising faster than wages. While the median annual wage for all Orange County occupations increased by \$2,278, or 4 percent, between 2017 and 2018, the minimum qualifying income to purchase an entry level home increased by \$8,190, or 8 percent. The following chart shows median salaries for 10 of the county's largest occupations; only one, Software Developers, earns sufficient income to afford an entry level home.

DESPITE RECENT SALARY GROWTH, BUYING A HOME IS OUT OF REACH FOR MOST OCCUPATIONS

Minimum Income Needed to Afford an Entry-Level Home Compared to Median Salaries in Selected Occupations in Orange County, First Quarter 2019

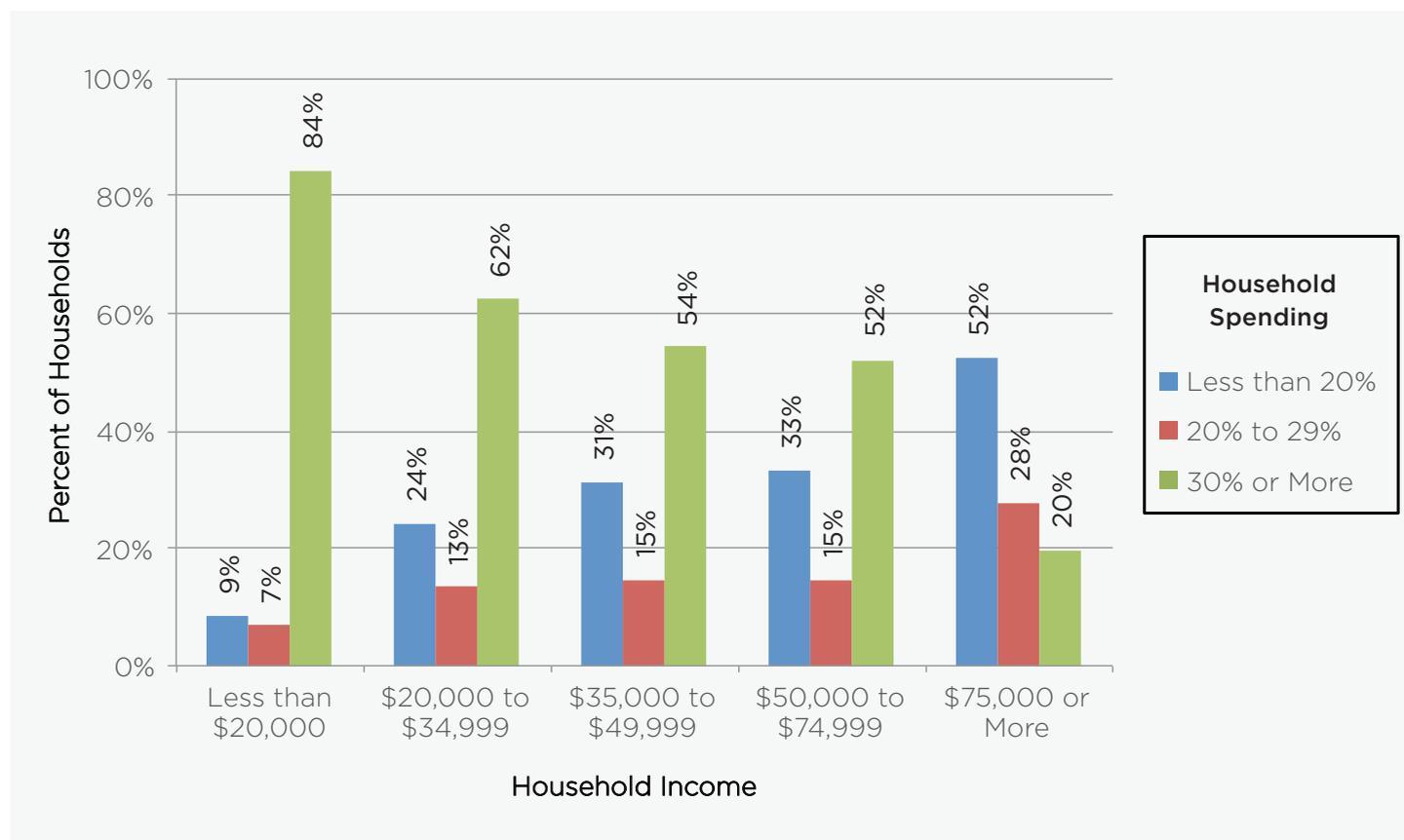


Sources: California Association of Realtors; Economic Modeling Specialists International; California Employment Development Department

Lower-income residents have a significantly higher housing burden than higher-income individuals in Orange County. Most households making under \$74,999 a year spend 30 percent or more of their incomes on housing, while the majority of residents making over \$75,000 a year spend less than 20 percent on housing costs. The lack of affordable workforce housing remains a stubborn problem, pushing many families further away from their place of employment.

HOUSING COSTS HIT LOW-INCOME RESIDENTS HARDEST

Orange County Owner-Occupied Housing Costs as a Percent of Income, 2017



Source: U.S. Census Bureau, 2017 American Community Survey 5-Year Estimates, Table B25106



HOUSING

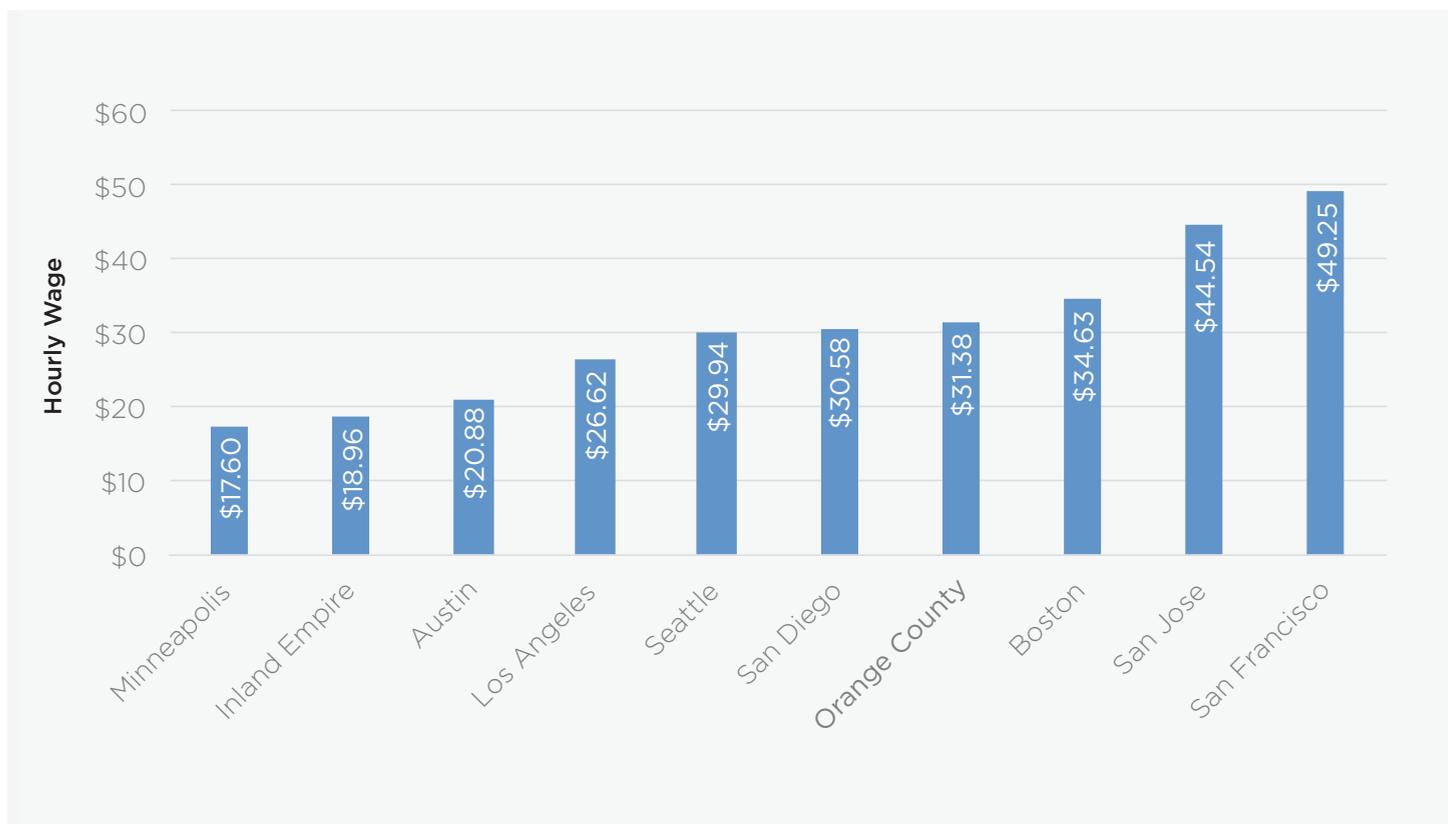
RENTAL AFFORDABILITY

To afford a median-priced one-bedroom apartment in 2019, an Orange County resident would need to make \$31.38 per hour – equivalent to an annual income of \$66,310 per year. This “housing wage” increased by a staggering 9 percent in a single year, and is up 27 percent since 2015. As rental prices continue to increase, workers earning above the minimum wage but below the housing wage of \$31.38 will see a greater proportion of their incomes go towards housing costs, reducing economic security and limiting consumer spending on a variety of other products and services.

A minimum wage worker in Orange County would have to work 105 hours a week to afford a one-bedroom apartment, 131 hours to afford a two-bedroom unit, and 183 hours to afford a three-bedroom. While Orange County has experienced recent wage increases, especially in 2018, the rising cost of housing in the region remains a significant concern for many households.

ORANGE COUNTY: MOST EXPENSIVE RENTAL MARKET IN SOUTHERN CALIFORNIA

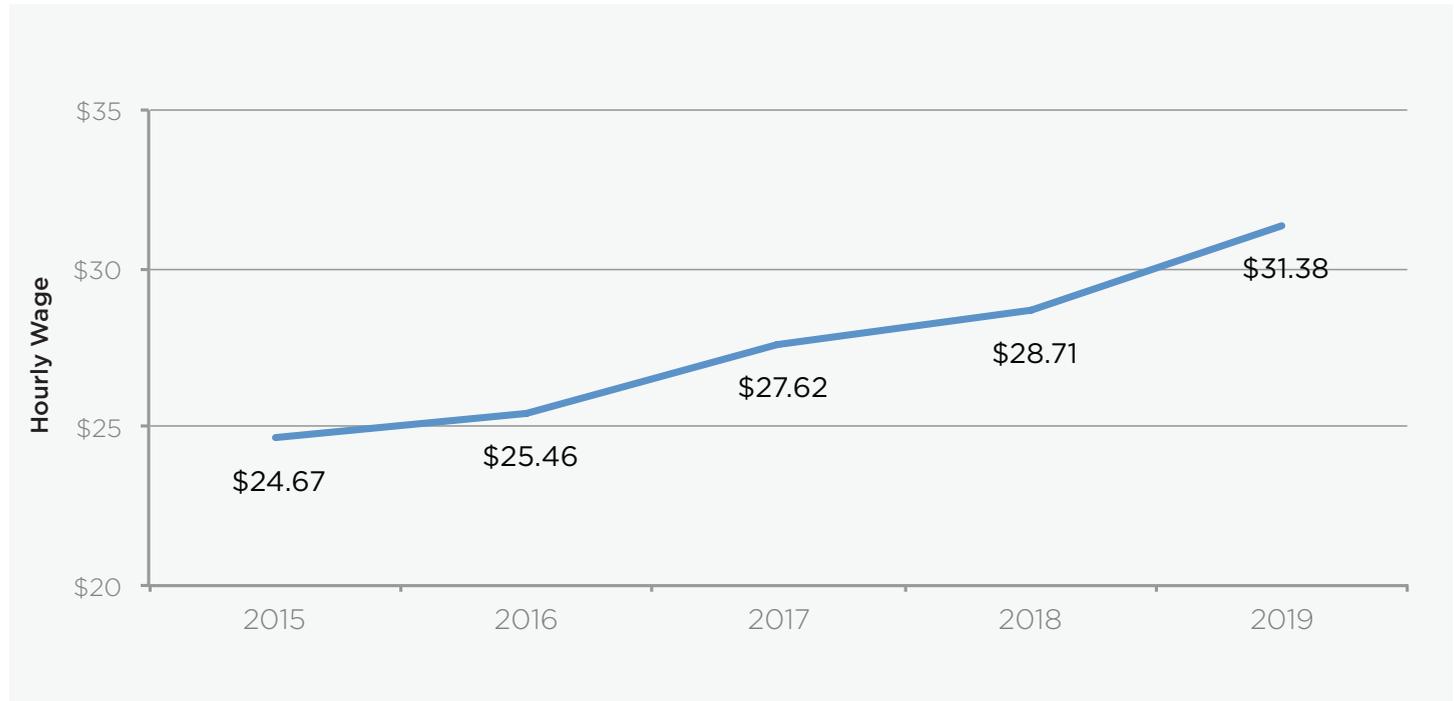
Regional Comparison of the Hourly Wage Needed to Afford a One-Bedroom Unit, 2019



Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition

WAGE OF \$31.38 AN HOUR NEEDED TO AFFORD ONE-BEDROOM RENT

Hourly Wage Needed to Afford a One-Bedroom Unit in Orange County, 2015-2019



Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition

MINIMUM WAGE EARNER MUST WORK 105 HOURS/WEEK TO AFFORD MEDIAN RENT

Rental Market Affordability in Orange County, 2017-2019

	2017	2018	2019
Fair Market Rent (Monthly) One Bedroom	\$1,436	\$1,493	\$1,632
Two Bedroom	\$1,813	\$1,876	\$2,037
Three Bedroom	\$2,531	\$2,626	\$2,862
Amount a Household with One Minimum Wage Earner Can Afford to Pay in Rent (Monthly)	\$546	\$572	\$624
Number of Hours per Week a Minimum Wage Earner Must Work to Afford One-Bedroom Fair Market Rent	105	104	105

Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition

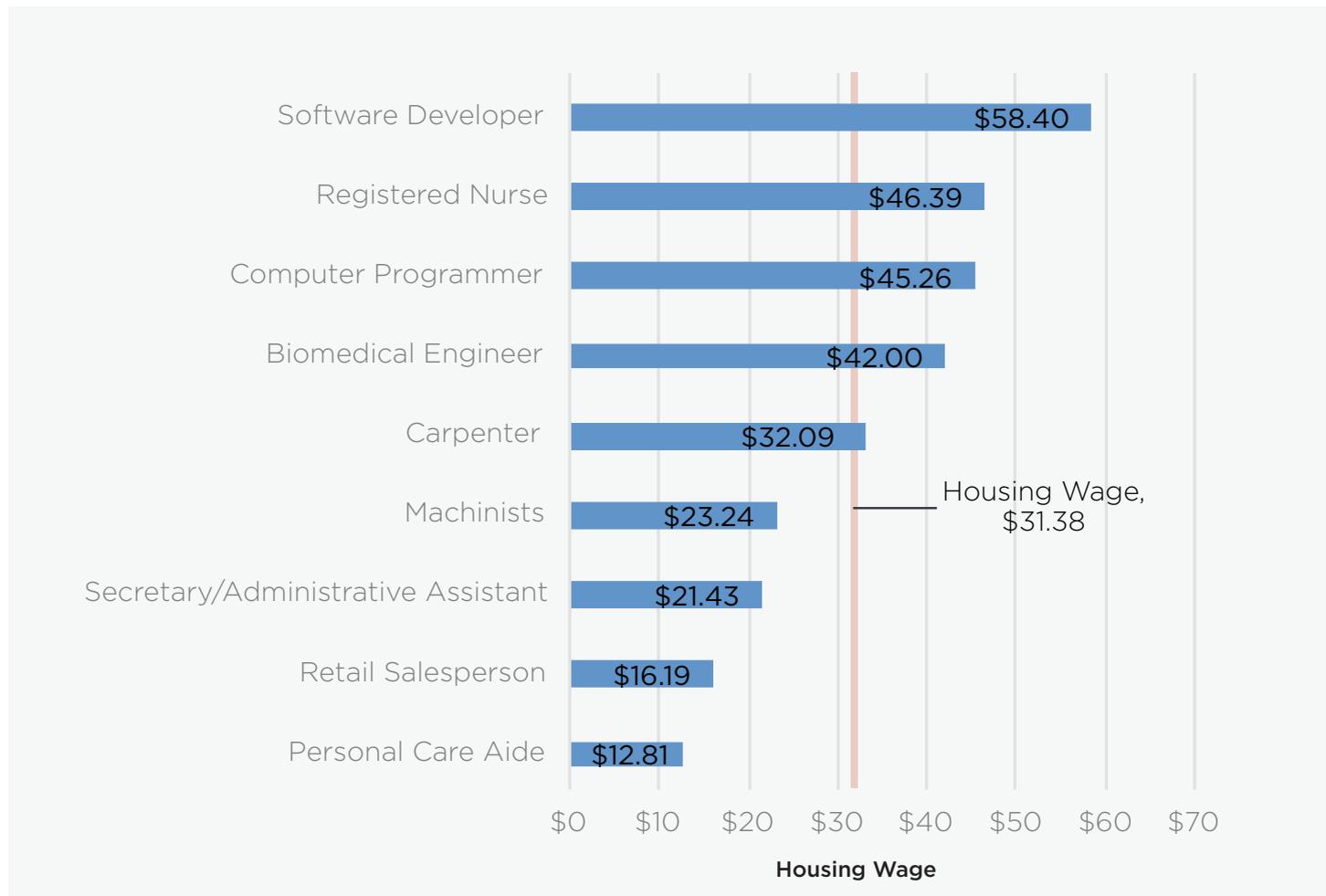


HOUSING

Four of nine common occupations – machinists, administrative assistants, salespersons, and personal care aids – earn less than Orange County’s housing wage of \$31.38/hour. This suggests that individuals in these occupations will have to seek out shared housing arrangements such as roommates or living with family members in order to be able to live in the county. Such trends can lead to overcrowding or homelessness. Additionally, as larger proportions of wages are steered towards rent, individuals are less able to afford medical care or vehicle maintenance costs while also unable to invest in education or retirement – primary tools for improving one’s economic standing.

RENT BURDEN IS HIGH FOR MANY LOWER-WAGE WORKERS

Hourly Wage Needed to Afford a Median One-Bedroom Unit in Orange County (2019) Compared to Median Local Wages in Selected Occupations (1st Quarter 2019)

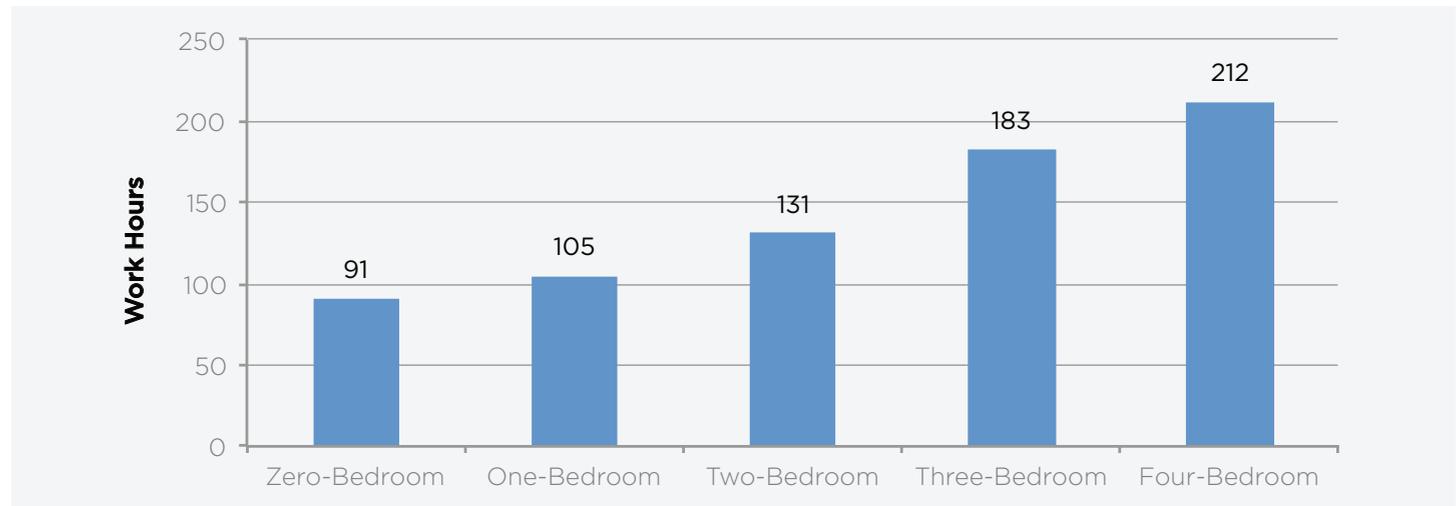


Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition (2019 housing wage); California Employment Development Department Occupational Employment Statistics (1st Quarter 2019)

As rental prices continue their upward march, workers in Orange County must increasingly work more hours in order to afford even a one-bedroom in the region. This problem only increases for workers earning minimum wage, where they would need 105 hours per week in order to afford a one-bedroom in the region. While these numbers seem dire, it should be noted that many minimum wage workers typically live with roommates helping them spread the cost of living between two or more individuals, serving to mitigate the cost of living in the county.

WORK HOURS REQUIRED BY HOUSING SIZE FOR MINIMUM AND RENTER WAGES

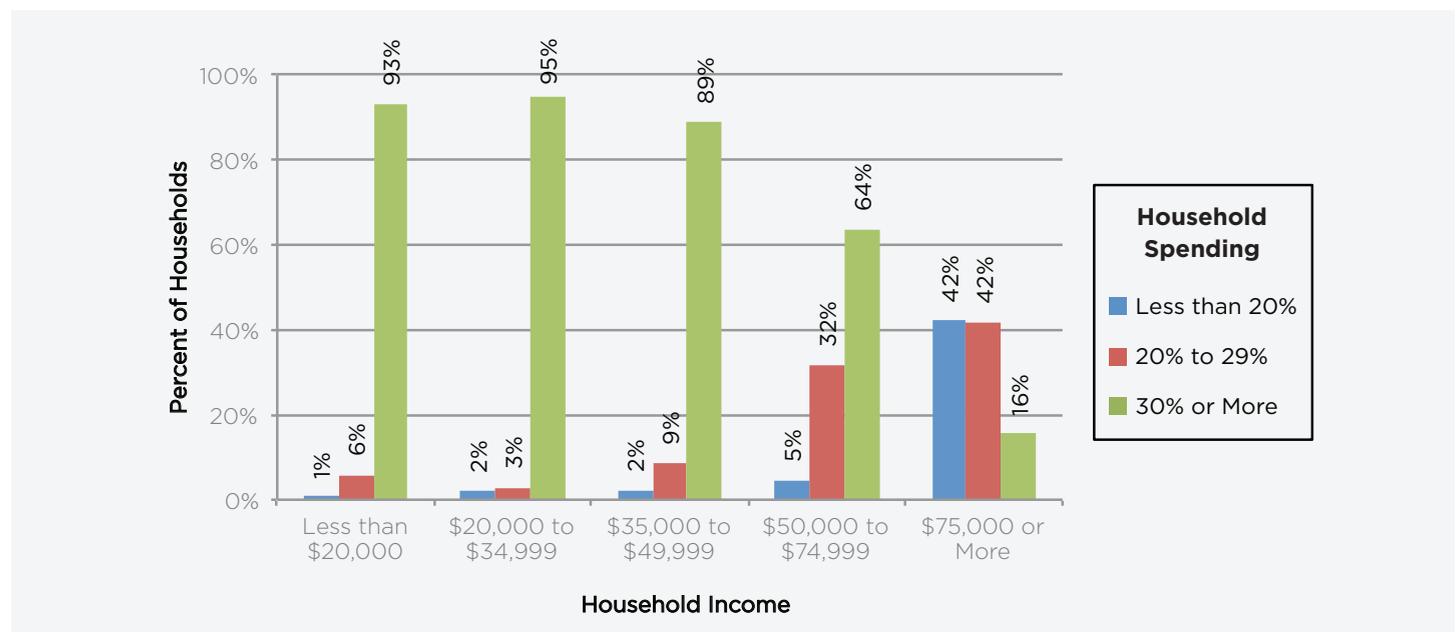
Orange County Work Hours Required by Housing Size for Minimum Wage Workers, 2019



Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition

MOST LOW-INCOME RENTERS SPEND MORE THAN 30 PERCENT OF THEIR INCOME ON HOUSING

Orange County Renter-Occupied Housing Costs as a Percent of Income, 2017



Source: U.S. Census Bureau, 2017 American Community Survey 5-Year Estimate, Table B25I06



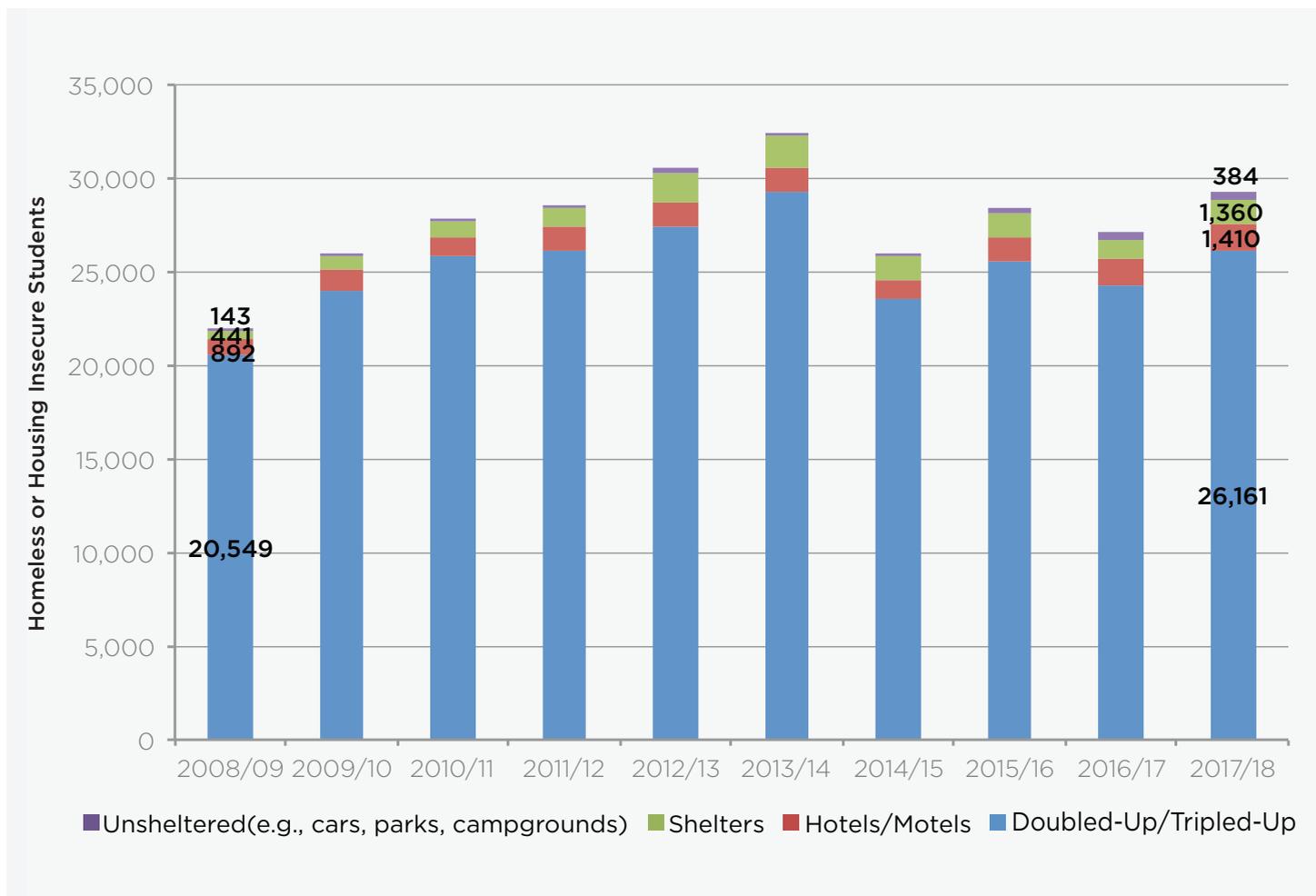
HOUSING

HOUSING SECURITY

During the 2017/18 school year, approximately 29,315 Pre-K through 12th grade students in Orange County were homeless or living in unstable housing situations, an 8 percent increase from the previous year. The majority of these students (26,161) were “doubled up” or “tripled up” with other families. The number of students living in shelters (1,360) increased by 29 percent, while those living unsheltered (384) increased 5 percent, and students living in motels (1,410) decreased less than 1 percent. While the current number of students in risky housing situations (29,315) increased by 33 percent since 2008/09, it remains well below the peak of 32,510 in 2013/14.

29,315 ORANGE COUNTY STUDENTS ARE DOUBLED-UP WITH ANOTHER FAMILY OR HOMELESS

Homeless and Housing Insecure Students in Orange County by Primary Nighttime Residence, 2008/09-2017/18

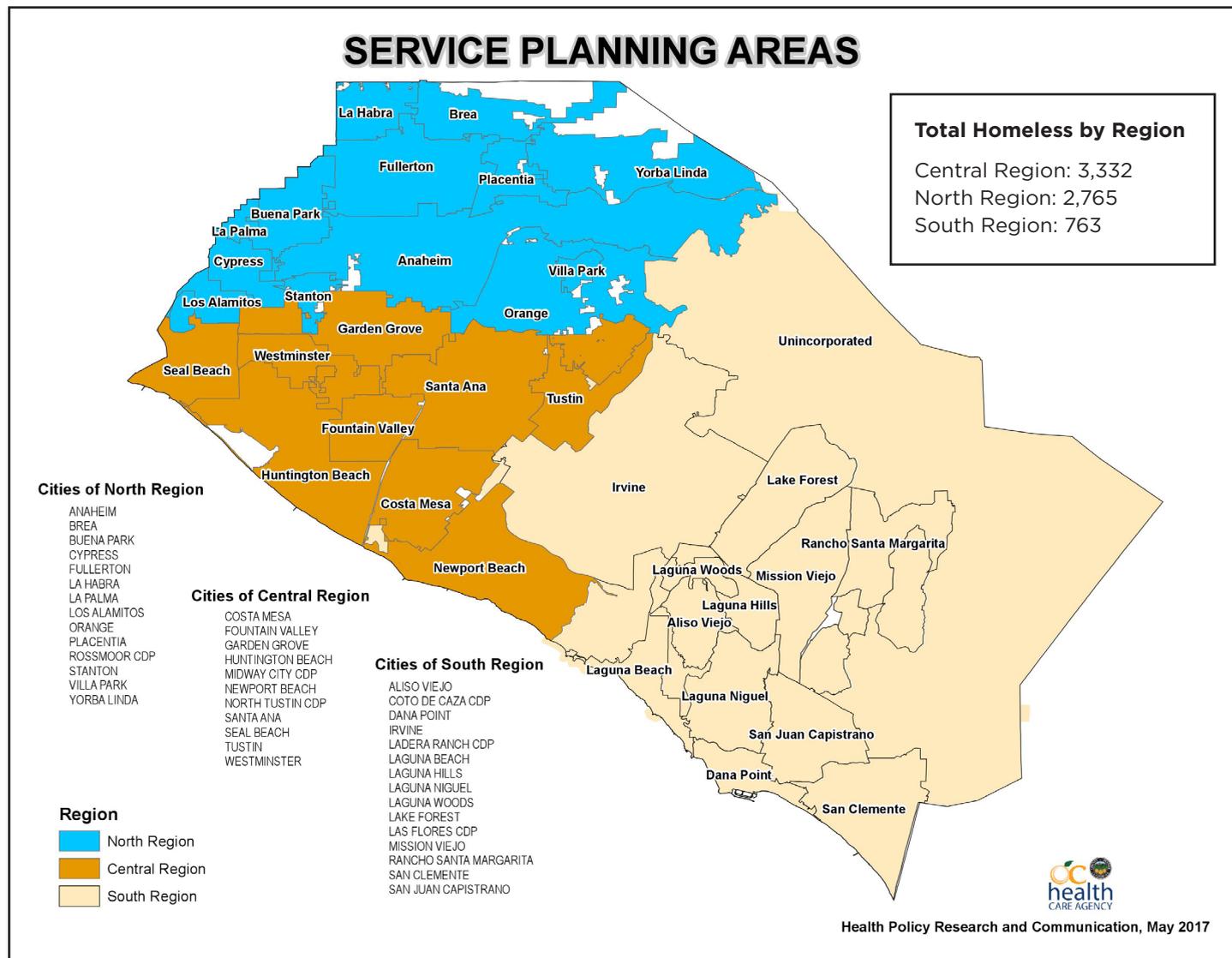


Source: California Department of Education and Orange County Department of Education

Data Notes

Lower student homeless figures in 2014/15 are attributed to an issue with the California Department of Education student data collection system, CALPADS, where a student’s homeless status did not automatically transfer from 2013/14 to 2014/15, resulting in a temporary decline in the official number of students identified as homeless in 2014/15.

The April 25, 2019 Point-In-Time (PIT) survey of Orange County's homeless population found that approximately 6,860 residents are experiencing homelessness. This survey uses teams of volunteers to count people who are homeless on a particular day in January, in contrast to Department of Education data that relies on school administrators annually identifying a student as housing insecure. The overall PIT count in 2019 is 43 percent higher than the 2017 estimate, which is largely attributed to steps taken to get a more accurate count rather than shifts in the homeless population. Nearly 60 percent of Orange County's homeless population is unsheltered, while less than 10 percent are veterans and 14 percent are children and youth (17 and under).



The report specifically states it used improved processes and methodology:

The change in methodology allowed the count teams to collect unique ID data points that were used to de-duplicate records for the two day street count process. The survey data was collected with ArcGIS Survey 123, a phone application that captures GIS locations and provides vital information that guides the way the County responds to homelessness in Orange County. The results for the 2019 Everyone Counts process provide the most accurate data on the scope of homelessness in the County. Because of this improved process, methodology and data quality from the use of GIS technology, Orange County's 2019 Point In Time Count results ensure that Everyone Counts.



HOUSING

2019 Point-in-Time Count Results

NUMBER OF HOMELESS ON ANY GIVEN NIGHT

6,860

PERCENT OF HOMELESS LIVING UNSHELTERED

58%

PERCENT CHANGE IN UNSHELTERED HOMELESS SINCE 2017

+53%

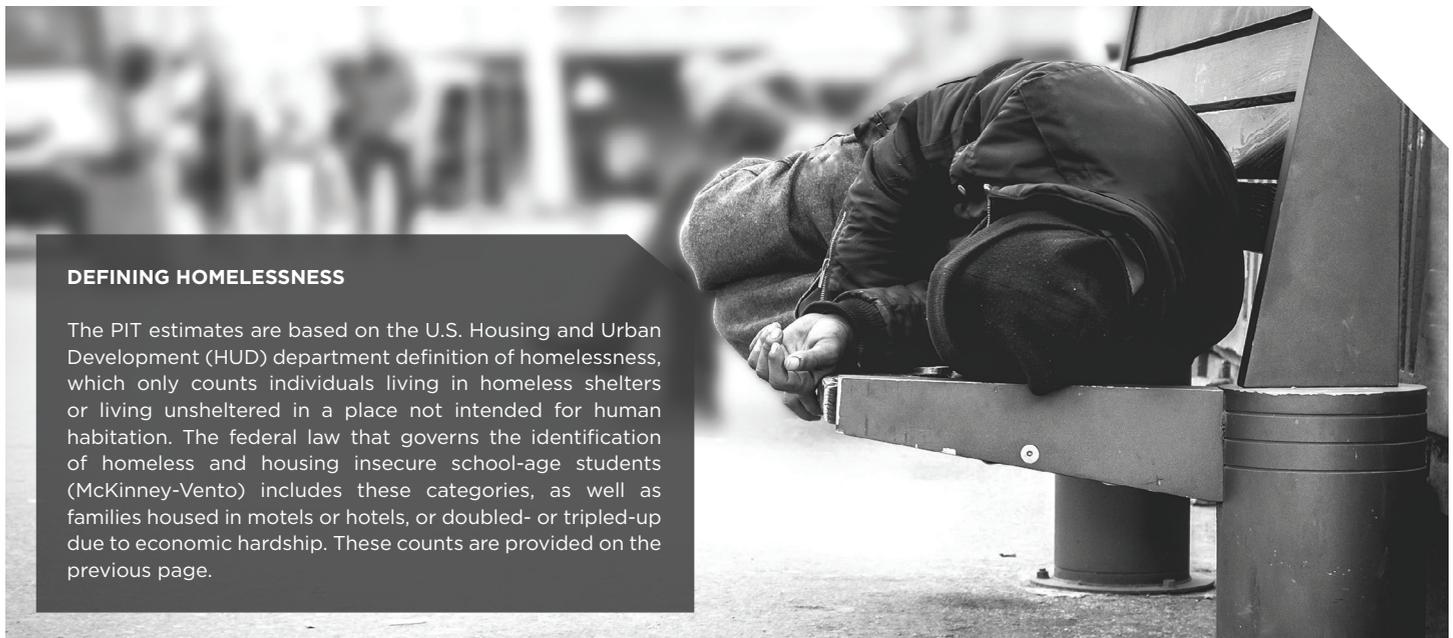
PERCENT OF ALL HOMELESS THAT ARE VETERANS

6%

NUMBER OF HOMELESS CHILDREN

980

Source: Orange County 2-1-1, April 25, 2019 Point-in-Time County and Survey (www.ocpartnership.net)



DEFINING HOMELESSNESS

The PIT estimates are based on the U.S. Housing and Urban Development (HUD) department definition of homelessness, which only counts individuals living in homeless shelters or living unsheltered in a place not intended for human habitation. The federal law that governs the identification of homeless and housing insecure school-age students (McKinney-Vento) includes these categories, as well as families housed in motels or hotels, or doubled- or tripled-up due to economic hardship. These counts are provided on the previous page.



INCOME

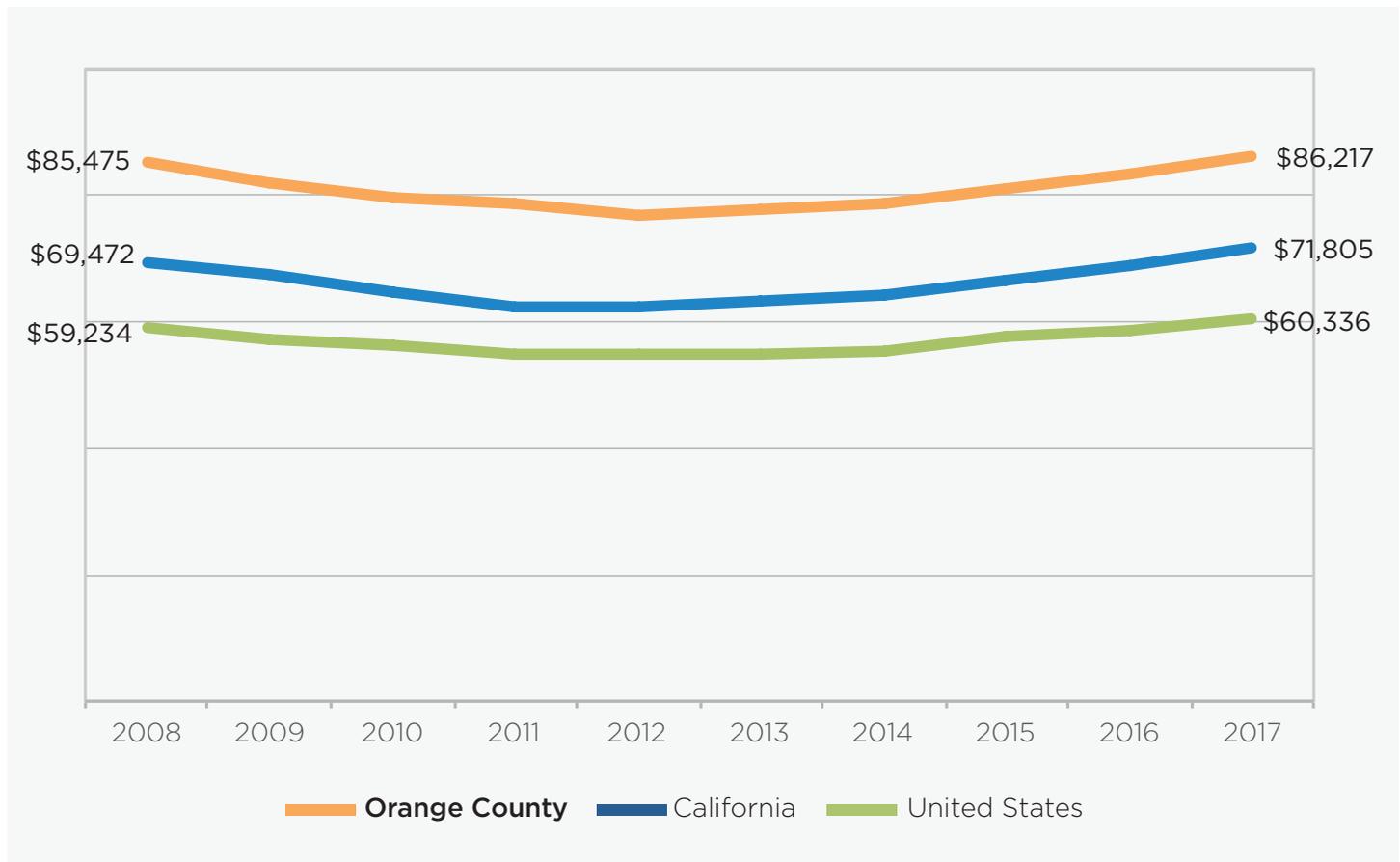
HOUSEHOLD INCOME

Orange County’s median household income increased for the fifth consecutive year, rising to \$86,217 in 2017. Robust income growth in the past few years, including an inflation-adjusted income growth rate of 3.2 percent between 2016 and 2017 (5.4 percent unadjusted), propelled median income to approximate the pre-recession median income high.

Orange County has more high earners and fewer low earners compared to state and national averages. This is likely due in part to the higher cost of living in Orange County relative to the national average, which can drive up wages (see inset). Still, nearly 45,000 Orange County households earn less than \$10,000 annually and another 98,000 households earn \$10,000 to \$24,999. For context, the poverty level for a four-person household is approximately \$25,000

ROBUST GROWTH PROPELS RISE IN MEDIAN HOUSEHOLD INCOME

Median Household Income (Inflation Adjusted to 2017 Dollars) in Orange County, California and United States



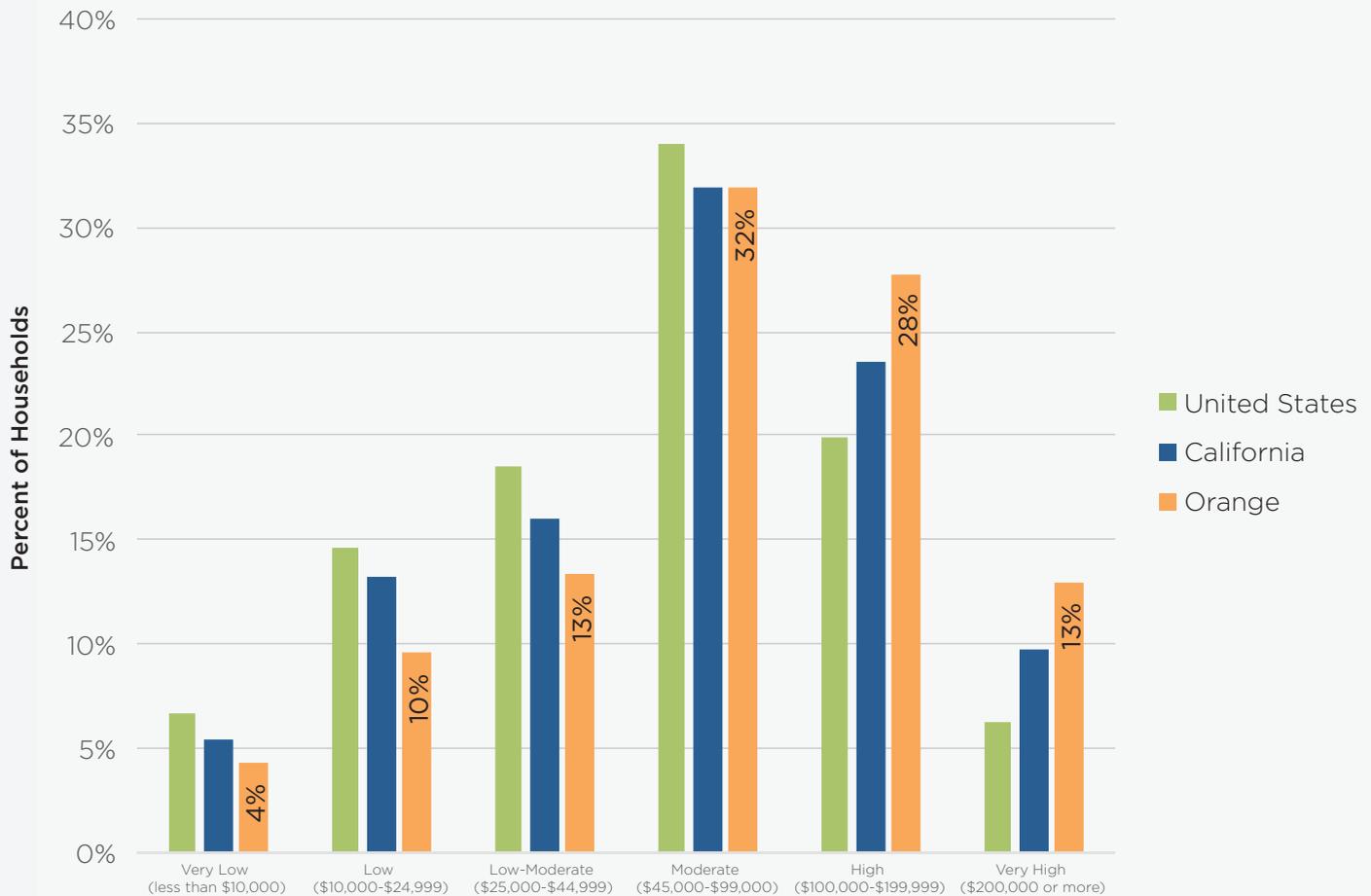
Sources: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table B19013 (<http://factfinder.census.gov/>); U.S. Inflation Calculator, reporting Consumer Price Index (CPI-U) data provided by the U.S. Department of Labor, Bureau of Labor Statistics



INCOME

13% OF ORANGE COUNTY HOUSEHOLDS EARN \$200,000 OR MORE; 14% EARN LESS THAN \$25,000

Distribution of Households by Median Household Income in Orange County, California and the United States, 2017



Number of Orange County households in the "Very Low" income group: 44,811

Approximate 2017 U.S. poverty threshold for a 4-person household: \$25,000

Eligibility for many support services begins at <185% of poverty, or roughly \$46,500 for a 4-person household

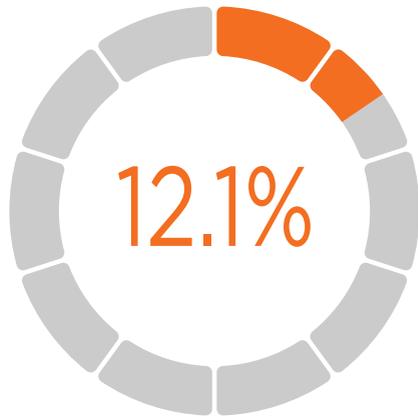
2017 median household income in Orange County: \$86,217

Minimum qualifying income for a first-time homebuyer in Orange County in 2017: \$102,000

The number of Orange County households grew 5% between 2009 and 2017, while the number of households in the "Very High" group grew 51%. In contrast, the number of households in the "Very Low" group grew 21%.

Sources: U.S. Census Bureau, American Community Survey, 5-Year Estimates (Table B19001), 2009 through 2017; U.S. Census Bureau, Poverty Thresholds for 2017; California Association of Realtors, First-Time Buyer Housing Affordability Index

Percentage of Orange County residents living in poverty



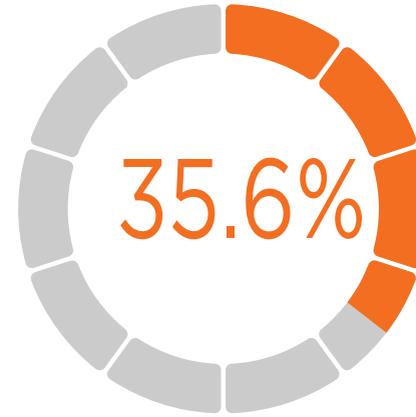
Percentage of Orange County children living in poverty



Working poor: percentage of residents living in poverty who work full-time



or part-time



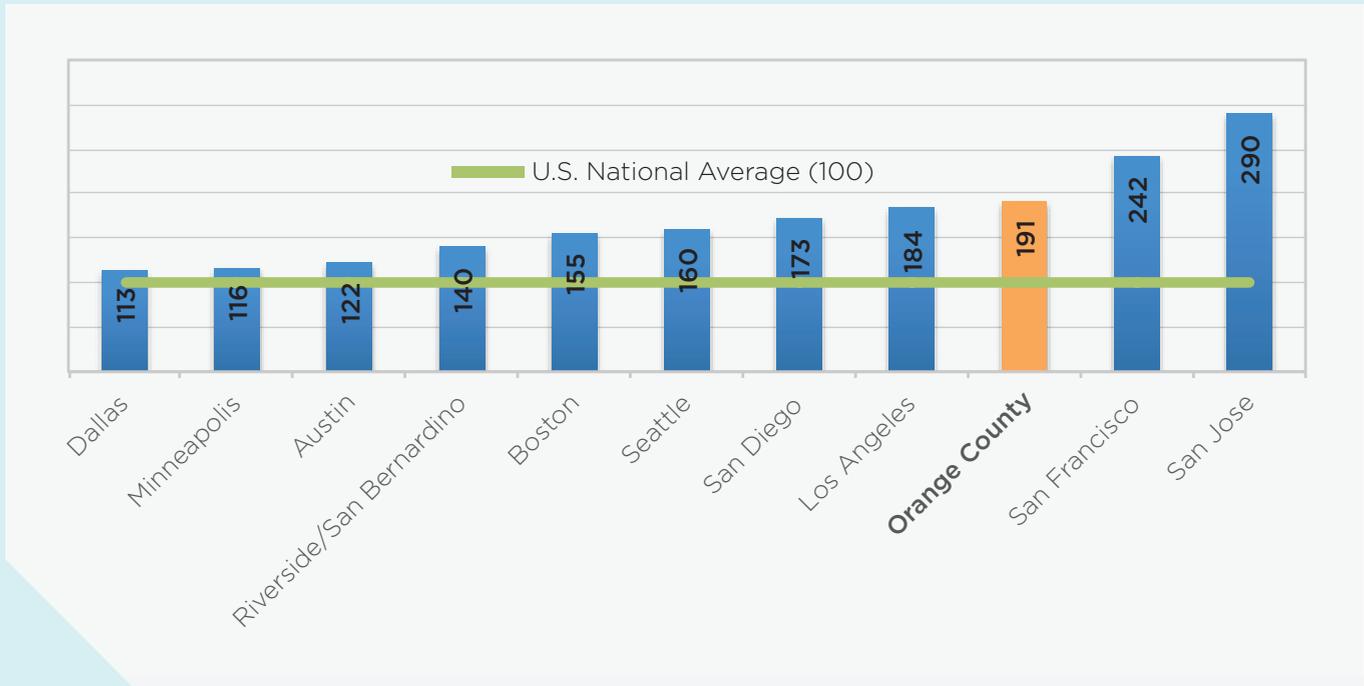
Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates (Table S1701)



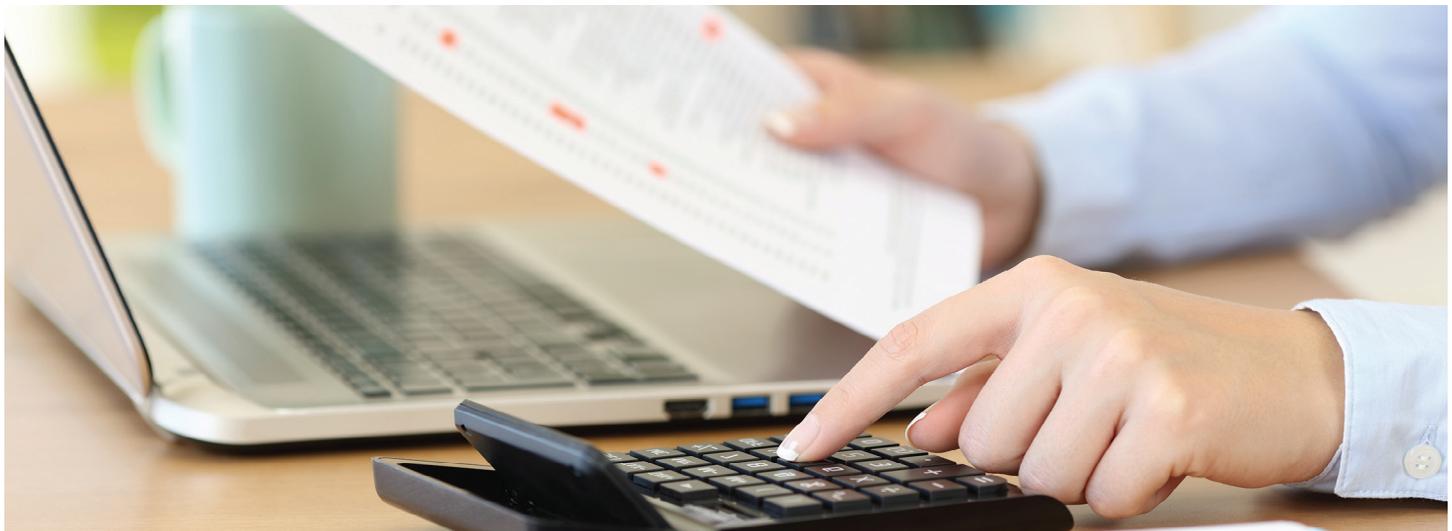
INCOME

Cost of Living in Orange County is 91% Higher than National Average

Orange County’s cost of living index (191) was the third highest among peer markets and 91 percent higher than the national average (100). The county’s high cost of living is driven by high housing costs, which account for 30 percent of the index and are estimated to be 385 percent higher than the national average. The cost of living calculation also includes food and groceries, transportation, utilities, health care, and miscellaneous expenses.



Source: Sperling’s Best Places



FAMILY FINANCIAL STABILITY

The 2017 Family Financial Stability Index for Orange County (FFSI-OC) shows that 26 percent of county neighborhoods had high levels of family financial instability (scores of 1, 2, 3, and 4 out of a maximum score of 10). The FFSI-OC measures the financial stability of families with children under 18 by Orange County neighborhood and is a composite of three metrics: family income, employment status, and the proportion of household income spent on rent. FFSI-OC tracking began in 2012, when 39 percent of neighborhoods received “unstable” FFSI-OC scores of 4 or less. While this level of instability rose to include 41 percent of neighborhoods in 2013, family financial stability has steadily improved each year since then. The improvement in overall financial stability since 2013 appears to be mostly driven by:

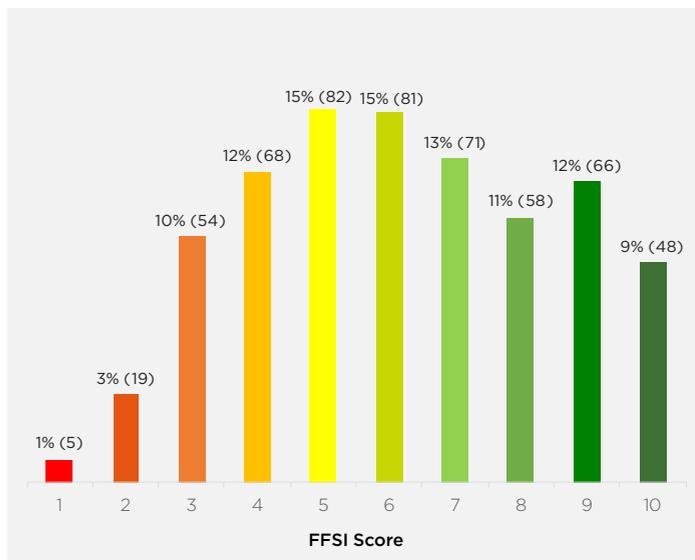
- Increased employment levels of families in the neighborhood;
- An increase in income among neighborhood families; and
- A slight easing of rent burden.

Cities with the highest concentrations of family financial instability all had scores of 4 on the 2017 FFSI-OC and included Anaheim, La Habra, Santa Ana, Stanton and Westminster.



MOST NEIGHBORHOODS RELATIVELY FINANCIALLY STABLE

FFSI-OC Scores: Percent and Count of Orange County Neighborhoods, 2017

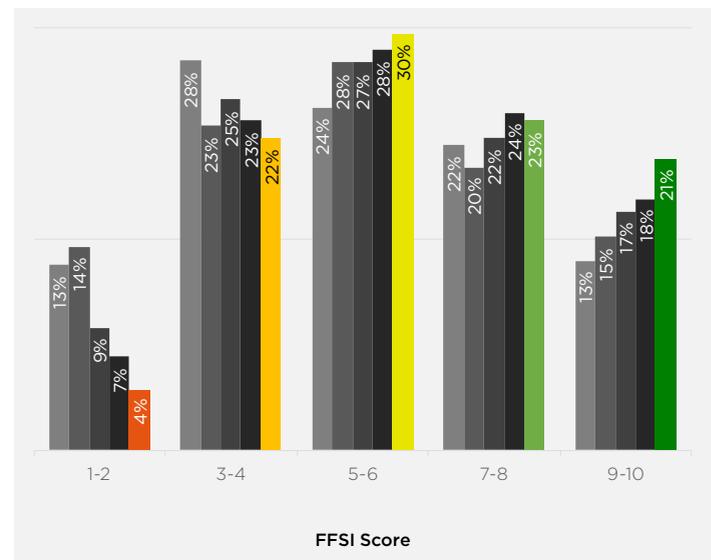


Note: Percentages have been rounded. The number of neighborhoods falling within each FFSI-OC index score is provided in the parentheses following the percentage.

Source: Parsons Consulting, Inc. for Orange County United Way

FEWER NEIGHBORHOODS WITH HIGH CONCENTRATIONS OF FAMILY FINANCIAL INSTABILITY

Percent of Orange County Neighborhoods by FFSI-OC Score, 2013-2017



Source: Parsons Consulting, Inc. for Orange County United Way

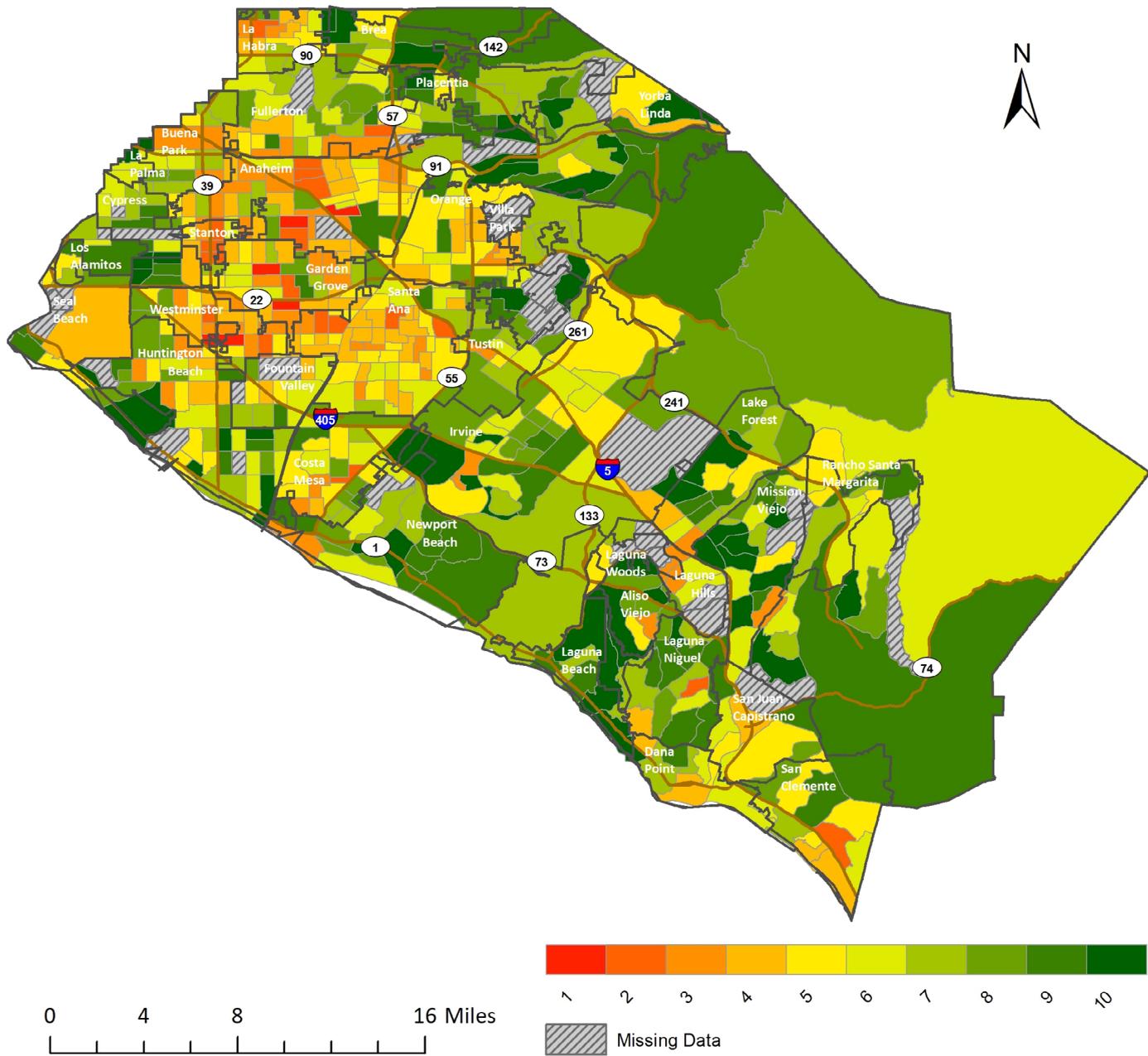




INCOME

26 PERCENT OF NEIGHBORHOODS HAVE HIGH CONCENTRATIONS OF FAMILY FINANCIAL INSTABILITY

Family Financial Stability Index - Orange County: 2017 Neighborhood-Level Results



Red or dark orange areas on the map represent neighborhoods with low levels of family financial stability. Families in these neighborhoods are more likely to have a low income, spend more than 50 percent of household income on rent, and/or have one or more unemployed adults seeking employment. Green areas, on the other hand, have a higher proportion of families that are financially stable. Gaps in data are due to small neighborhoods where data has been suppressed to protect privacy.



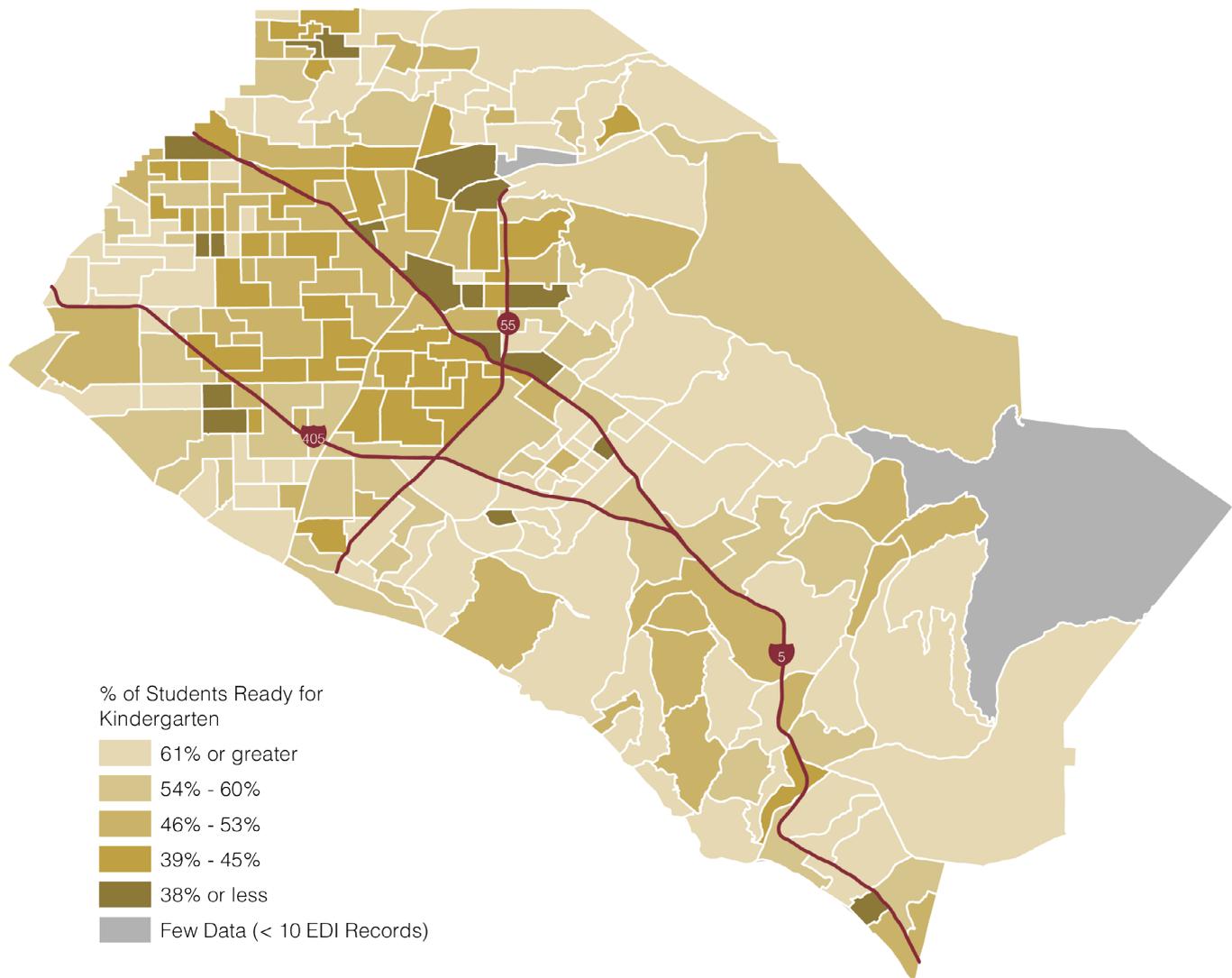
EDUCATION

KINDERGARTEN READINESS

In 2019, 53 percent of children in Orange County were developmentally ready for kindergarten. Orange County measures children’s readiness for school through the Early Development Index (EDI). Using the EDI tool, public school teachers assess their kindergarten students based on the EDI’s five areas of development: physical health and well-being, communication skills and general knowledge, social competence, emotional maturity, and language and cognitive development. Children are considered developmentally ready for school if they are on track on all five areas, or on all four areas if only four were completed.

CHILDREN’S SCHOOL READINESS VARIES BY COMMUNITY

Children on Track on All Developmental Areas, Orange County, 2019



Source: Orange County Early Development Index, 2019



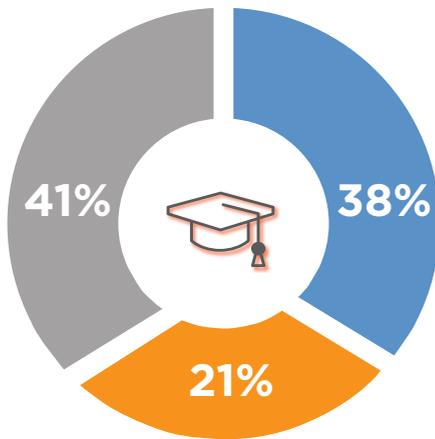
EDUCATION

The five areas of a child's development are divided into 16 sub-areas, as listed below. EDI data from 2019 indicate that Orange County children are most ready in the sub-areas of physical readiness for the school day (97 percent) and physical independence (89 percent). Orange County children are least ready in the sub-areas of communication skills and general knowledge (38 percent not ready), gross and fine motor skills (34 percent not ready), and prosocial and helping behavior (29 percent not ready). Children who are "somewhat ready" could benefit from developmentally appropriate activities and interventions to help them become ready for kindergarten.

CHILDREN ARE LAGGING MOST IN COMMUNICATION, MOTOR, AND SOCIAL SKILLS

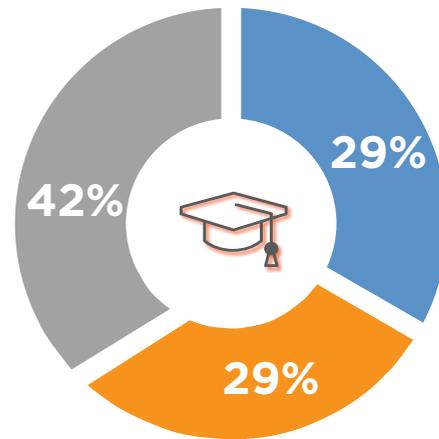
Readiness in the Four (out of 16) Sub-areas where Children are Least Ready, Orange County, 2019

COMMUNICATION SKILLS AND GENERAL KNOWLEDGE



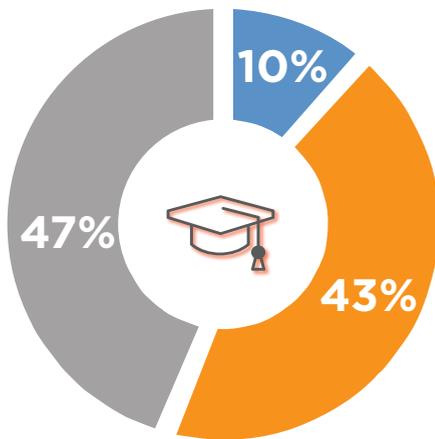
■ Not Ready ■ Somewhat Ready ■ Ready

PROSOCIAL AND HELPING BEHAVIOR



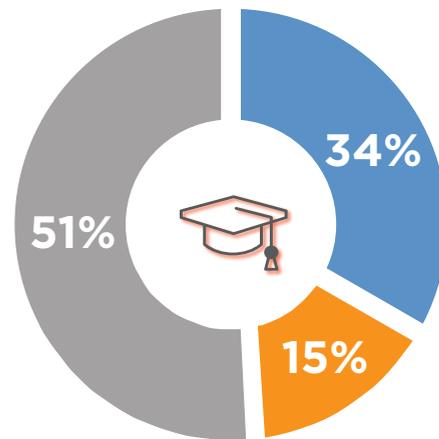
■ Not Ready ■ Somewhat Ready ■ Ready

OVERALL SOCIAL COMPETENCE



■ Not Ready ■ Somewhat Ready ■ Ready

GROSS AND FINE MOTOR SKILLS



■ Not Ready ■ Somewhat Ready ■ Ready

Source: Orange County Early Development Index, 2019

KINDERGARTEN READINESS

Language and Cognitive Development

- Basic numeracy skills
- Advanced literary skills
- Interest in literacy/numeracy and memory
- Basic literacy skills

Communication Skills and General Knowledge

Social Competence

- Readiness to explore new things
- Responsibility and respect
- Approaches to learning
- Overall social competence

Physical Health and Well-being

- Physical readiness for school day
- Physical independence
- Gross and fine motor skills

Emotional Maturity

- Anxious and fearful behavior
- Aggressive behavior
- Hyperactive and inattentive behavior
- Prosocial and helping behavior

Data Notes

The EDI is a measure of Orange County children's readiness for school, which is implemented through a partnership of First 5 Orange County and the UCLA Center for Healthier Children, Families and Communities, under license from McMaster University. It assesses children's development using a 120-item questionnaire filled out by kindergarten teachers on every child in their class. The EDI does not label or identify individual children with specific problems. Instead, it looks at how well children are prepared for kindergarten, which can be strongly influenced by their experiences at home and in the community prior to kindergarten entry. In 2015, comprehensive school readiness (EDI) data were available for the first time in Orange County. The EDI is the copyright of McMaster University and must not be copied, distributed, or used in any way without the prior consent of First 5 Orange County, UCLA, or McMaster.



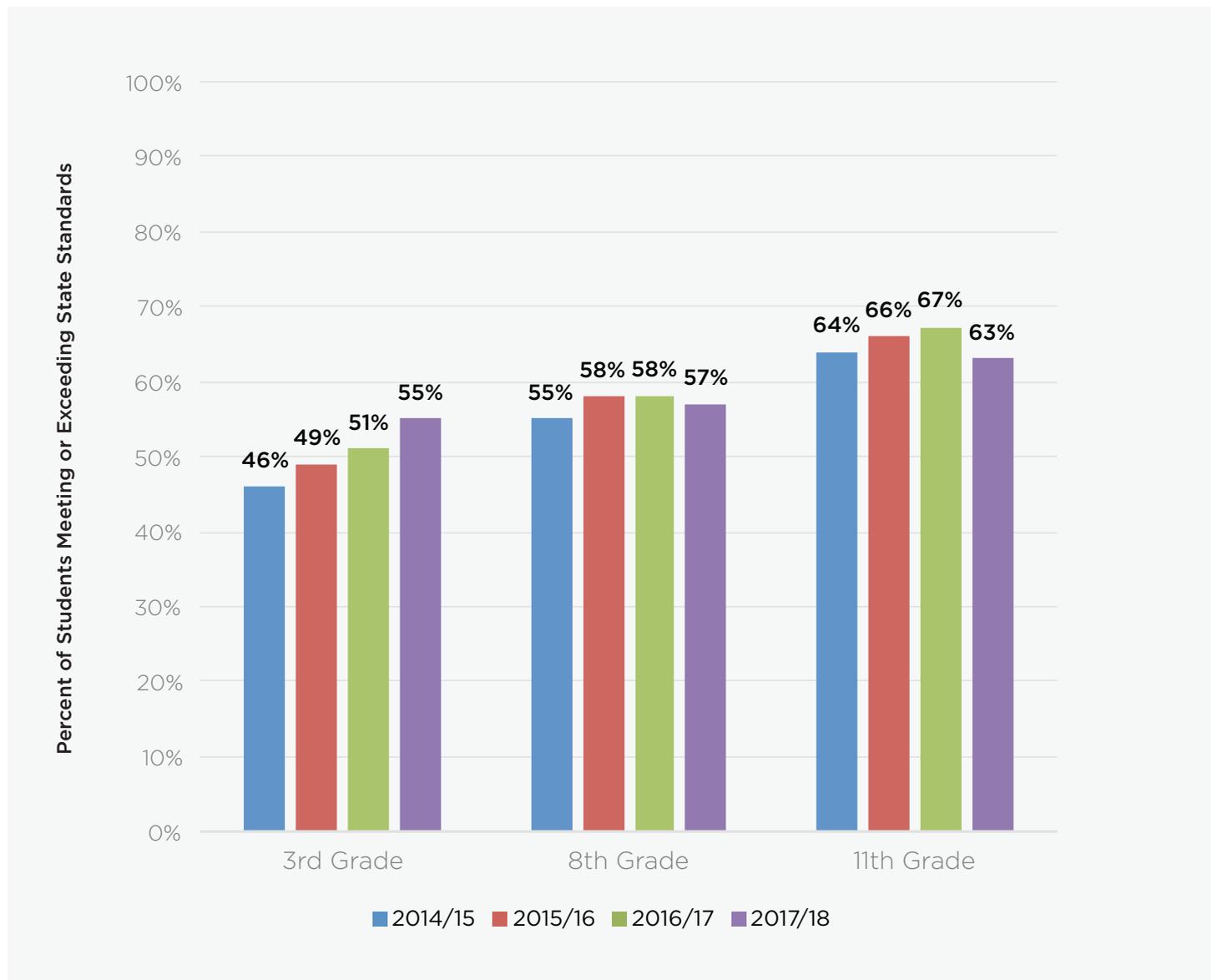
EDUCATION

ACADEMIC PERFORMANCE: LITERACY

In 2017/18, 55 percent of Orange County 3rd grade students met or exceeded the statewide grade level standard for English language arts and literacy (ELA). Third grade student performance improved for the third consecutive year and remained higher than the state average of 48 percent. Academic performance decreased slightly for 8th grade students, falling to 57 percent, and dropped to the lowest percentage for 11th grade students (63 percent) since Smarter Balanced testing began.

3RD GRADE LITERACY SCORES IMPROVE; 8TH AND 11TH GRADE SCORES DROP

Orange County Students Meeting or Exceeding State Standards in English Language Arts and Literacy by Selected Grade Level, 2014/15-2017/18

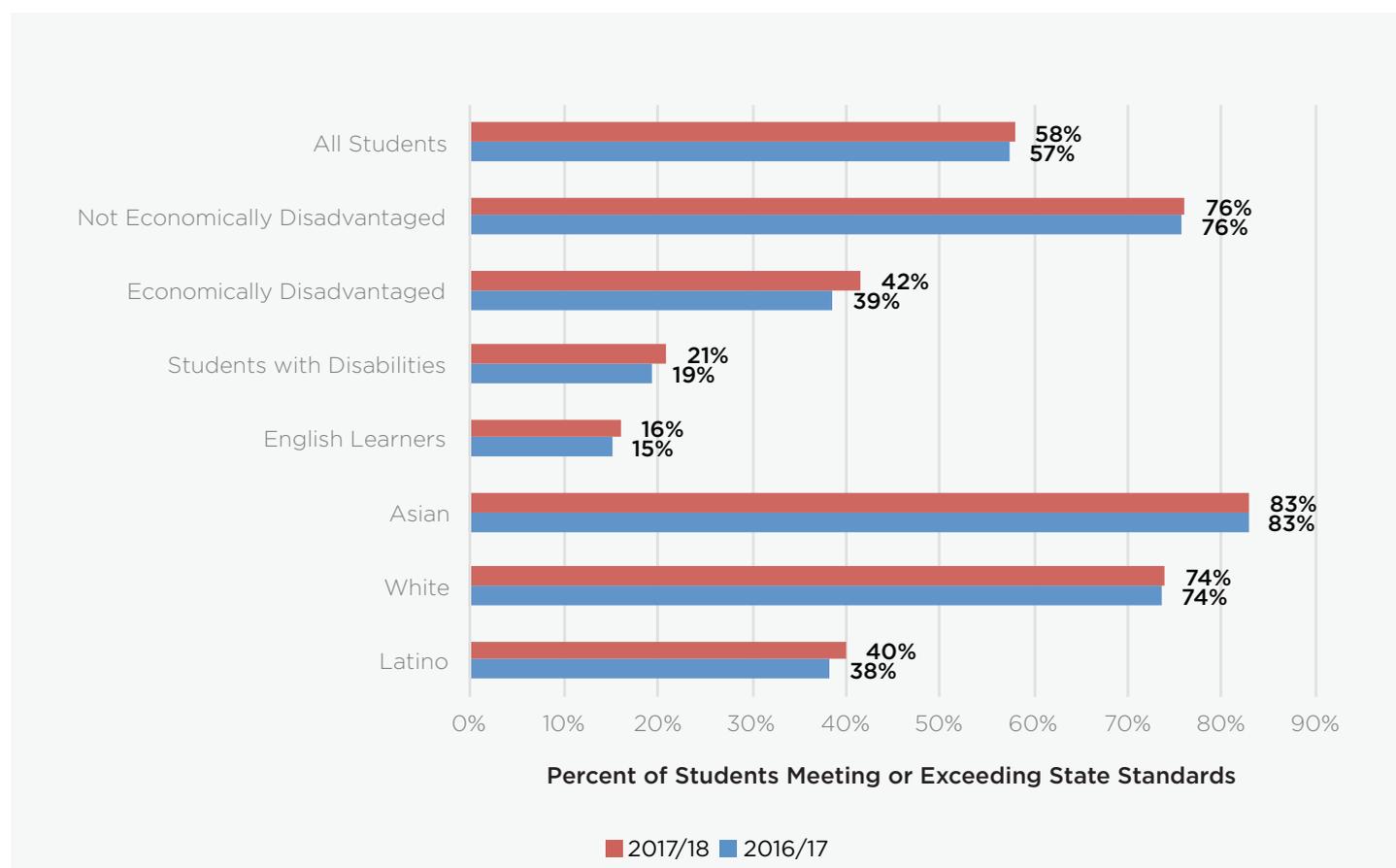


Source: California Department of Education

Among all Orange County students tested, 58 percent met or exceeded grade level standards for ELA in 2017/18, one percentage point more than the previous year. In comparison, 42 percent of economically disadvantaged students, 21 percent of students with a disability, and 16 percent of English learners met or exceeded the performance standard for ELA. Asian students had the highest percentage of students at or above the standard (83 percent), compared to 74 percent of White students and 40 percent of Latino students.

ABOUT ONE IN FIVE “ENGLISH LEARNERS” ACHIEVE STANDARDS

Orange County Students Meeting or Exceeding State Standards in English Language Arts and Literacy by Subgroup, 2016/17 and 2017/18



Source: California Department of Education

Data Notes

This is the fourth year that students in 3rd through 8th grade and 11th grade have taken the “Smarter Balanced Assessment,” referred to as the California Assessment of Student Performance and Progress (CAASPP), with published results. This assessment, designed to demonstrate progress toward mastery of the knowledge and skills needed for likely success in future coursework, is not comparable to assessments prior to 2014/15.



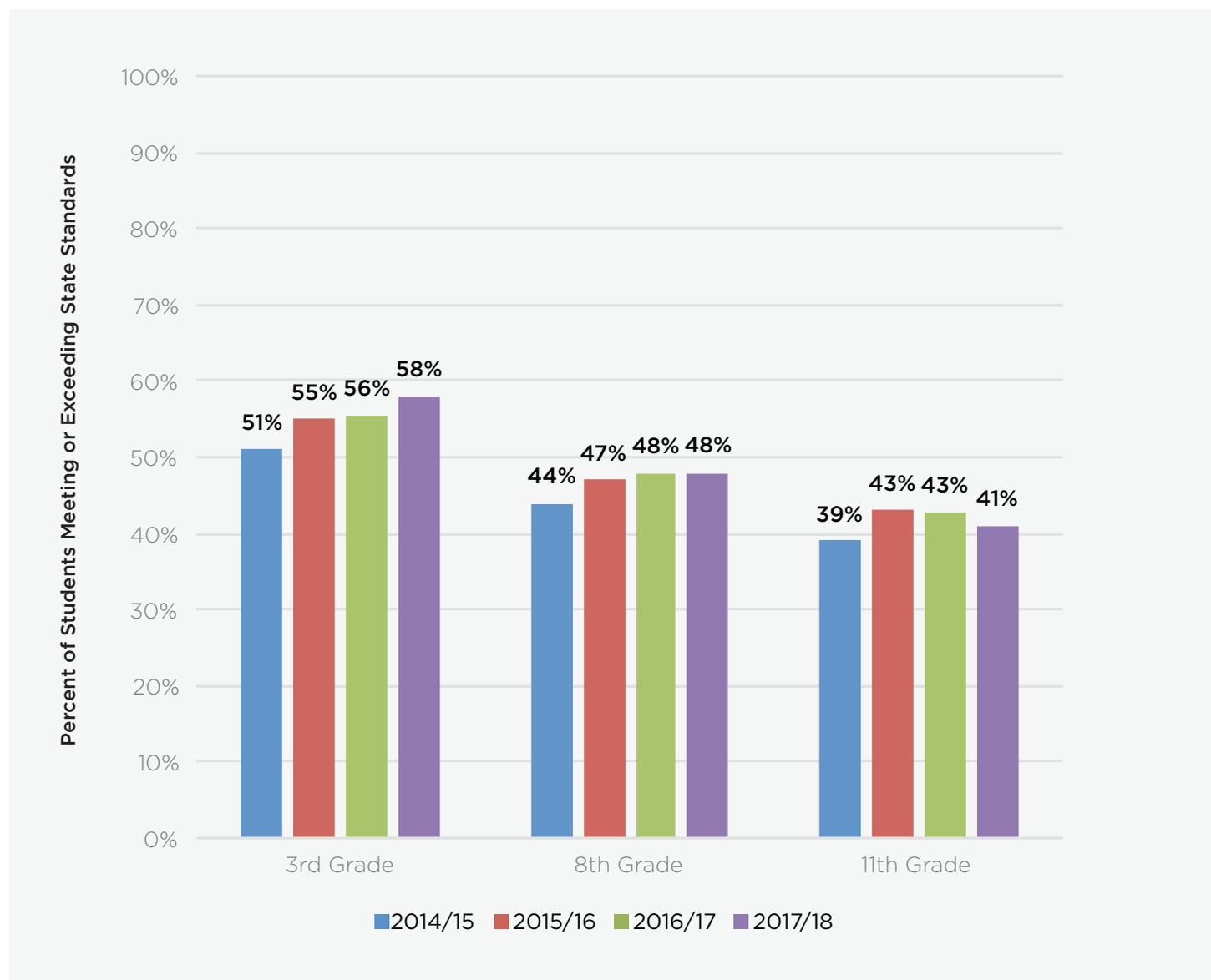
EDUCATION

ACADEMIC PERFORMANCE: MATHEMATICS

In 2017/18, 58 percent of Orange County 3rd grade students met or exceeded the statewide grade level standard for mathematics, a higher rate than the previous year (56 percent) and higher than the state average (49 percent). Academic performance stayed the same in the past year for 8th grade students but slightly declined for 11th grade students. Orange County 8th and 11th grade students both outperformed state averages. Unlike student performance in literacy, student performance in mathematics decreases as grade level increases.

MATH SCORES IMPROVE FOR 3RD GRADE STUDENTS AND DROP FOR 11TH GRADE STUDENTS

Orange County Students Meeting or Exceeding State Standards in Mathematics by Selected Grade Level, 2014/15-2017/18

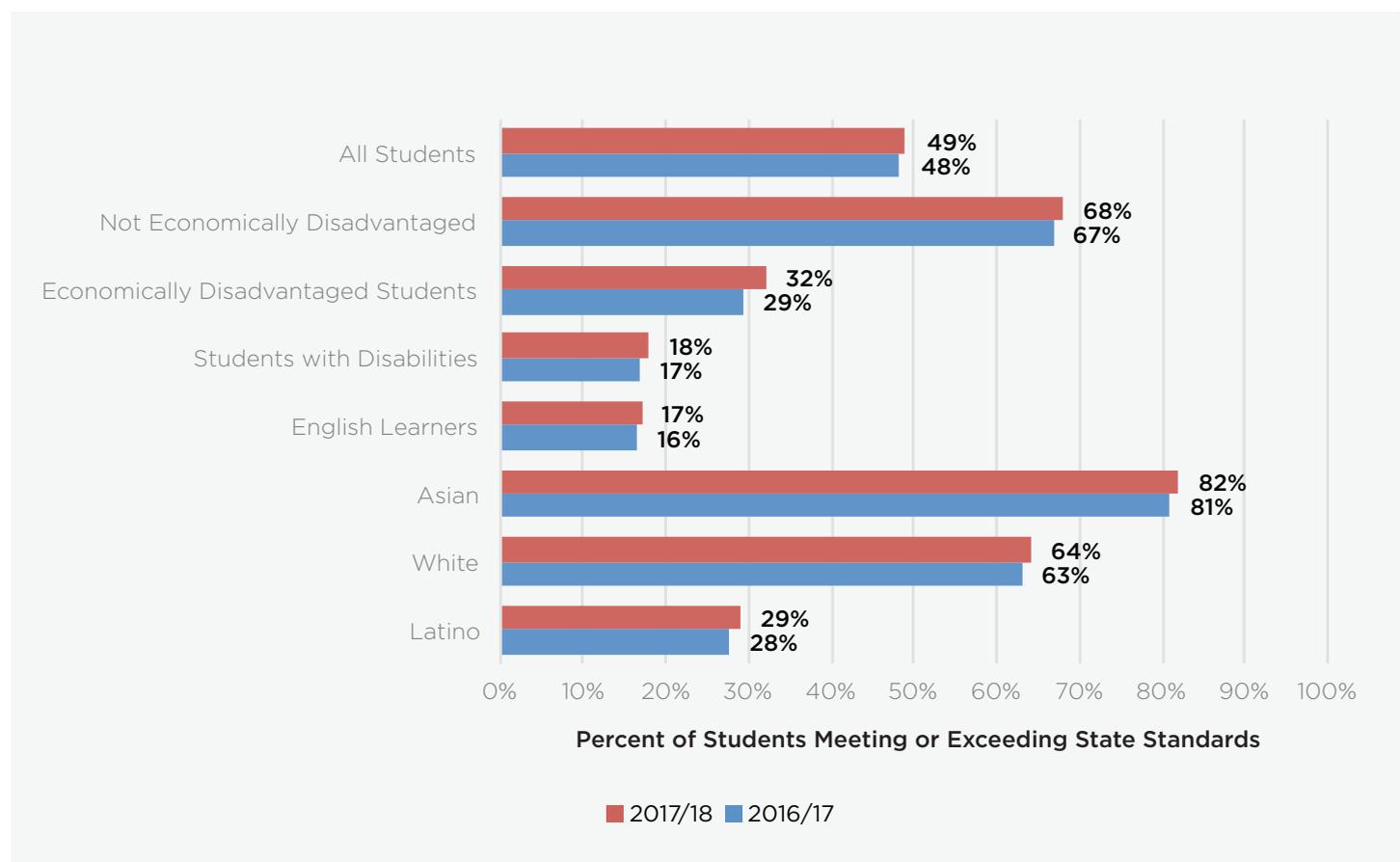


Source: California Department of Education Source: California Department of Education

Less than half of all Orange County students in the grades tested met or exceeded grade level standards for mathematics in 2017/18. In comparison, 32 percent of economically disadvantaged students, 18 percent of students with a disability, and 17 percent of English learners met or exceeded the performance standard for mathematics. Asian students had the highest rate (82 percent), compared to 64 percent of White students, and 29 percent of Latino students.

LESS THAN ONE-THIRD OF ECONOMICALLY DISADVANTAGED STUDENTS MEET OR EXCEED STANDARDS

Orange County Students Meeting or Exceeding State Standards in Mathematics by Subgroup, 2016/17 and 2017/18



Source: California Department of Education

Data Notes

This is the fourth year that students in 3rd through 8th grade and 11th grade have taken the “Smarter Balanced Assessment,” referred to as the California Assessment of Student Performance and Progress (CAASPP), with published results. This assessment, designed to demonstrate progress toward mastery of the knowledge and skills needed for likely success in future coursework, is not comparable to assessments prior to 2014/15.



EDUCATION

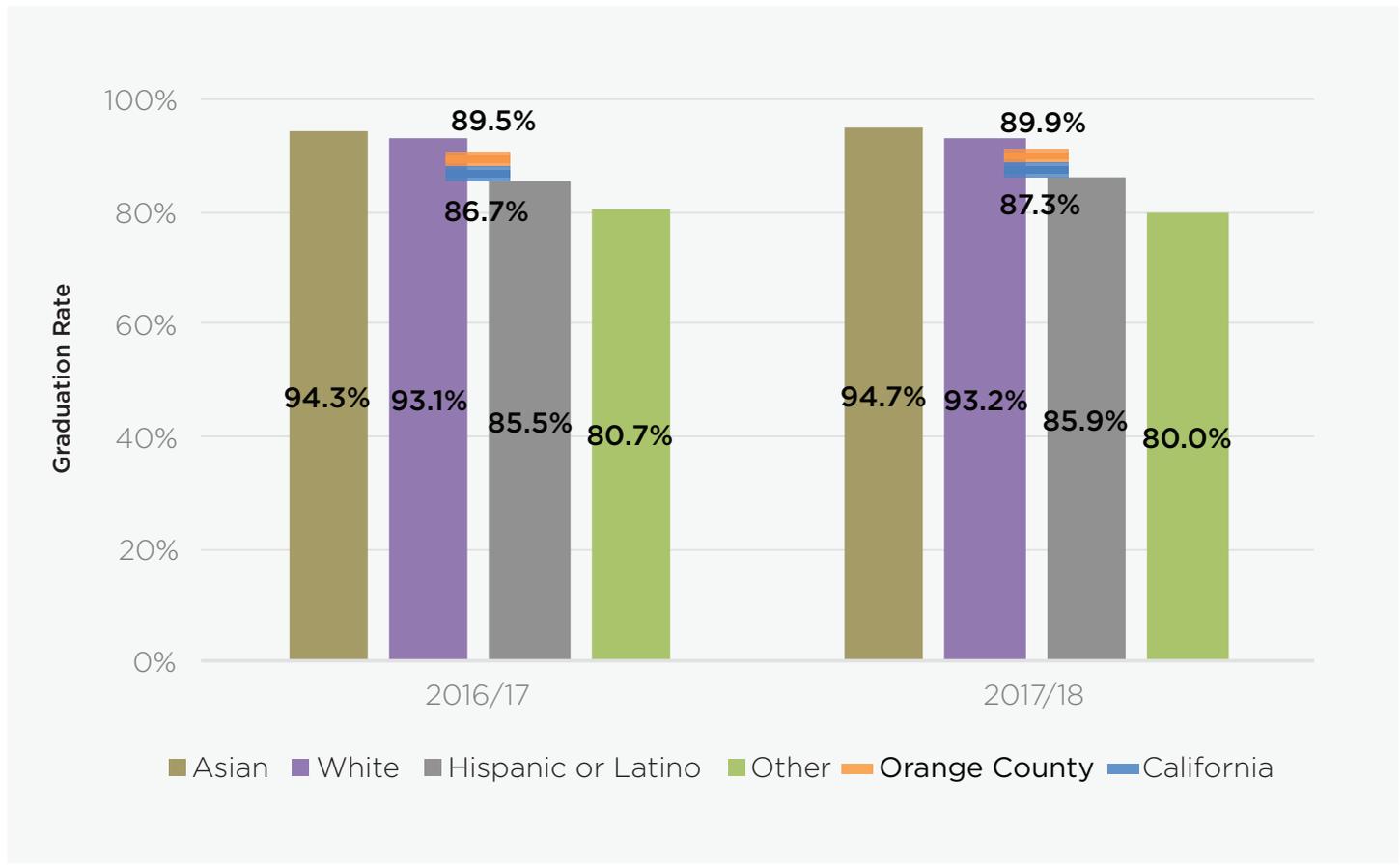
HIGH SCHOOL GRADUATION RATE

In Orange County, 89.9 percent of students who entered 9th grade in 2014 graduated on time four years later in 2018. This is higher than the statewide 2017/18 graduation rate of 87.3 percent and a slight improvement over Orange County's 2016/17 graduation rate of 89.5 percent.

In 2017/18, Asian students posted the highest graduation rate (94.7 percent) among the county's three largest racial/ethnic groups, followed by White students (93.2 percent) and Latino students (85.9 percent). Rates for all three groups improved since the prior year.

GRADUATION RATE IMPROVES SLIGHTLY

Graduation Rate by Race/Ethnicity in Orange County, 2016/17-2017/18



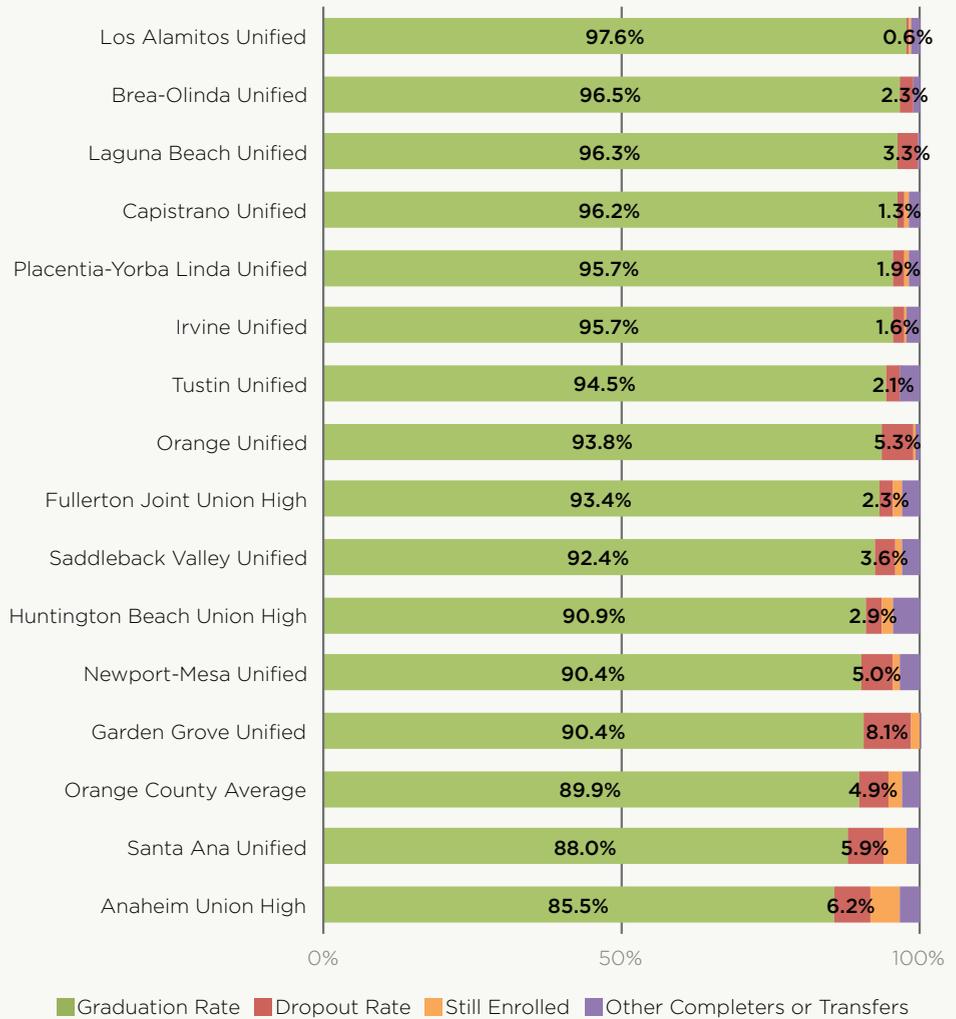
Source: California Department of Education, DataQuest

Data Notes

The graduation rate measures the percentage of students who receive a diploma in four years. Due to changes in methodology, four-year adjusted cohort graduation rate data are only available for the 2016/17 and 2017/18 school years. Data are for non-charter schools only, with the exception of the analysis by socio-economic status, which includes all schools. "Asian" includes Asian, Pacific Islander, and Filipino. "Other" includes Native American/Alaskan Native, African American, two or more races, or not reported. A student is considered socioeconomically disadvantaged if they are eligible for free or reduced-price school meals and neither of the student's parents received a high school diploma.

LOS ALAMITOS HAS THE HIGHEST GRAD RATE IN THE COUNTY

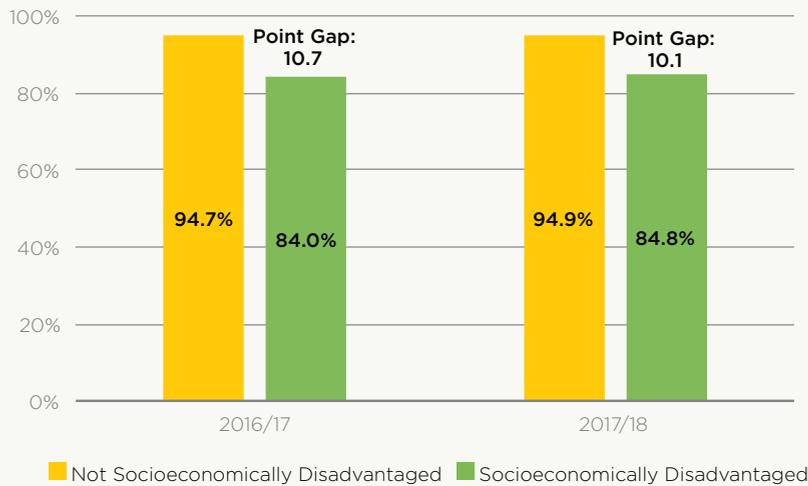
High School Student Outcomes by Orange County School District, 2017/18



The graduation rate among Orange County school districts ranged from a high of 97.6 percent in Los Alamitos Unified to a low of 85.5 percent in Anaheim Union High. The dropout rate ranged from less than one percent in Los Alamitos Unified (0.6 percent) to a high of 8.1 percent in Garden Grove Unified. The countywide average dropout rate was 4.9 percent, which was nearly the same as the 2016/17 dropout rate of 5.0 percent.

SOCIOECONOMIC STATUS GAP NARROWS SLIGHTLY

Four-Year Adjusted Cohort Graduation Rate by Socioeconomic Status, 2016/17-2017/18



In 2017/18, there was a 10.1 percentage point gap between the graduation rate of students who are not socioeconomically disadvantaged and those that are (94.9 percent and 84.8 percent, respectively). This gap is a slight improvement over the previous year, when there was a 10.7 percentage point gap.

Source: California Department of Education, DataQuest



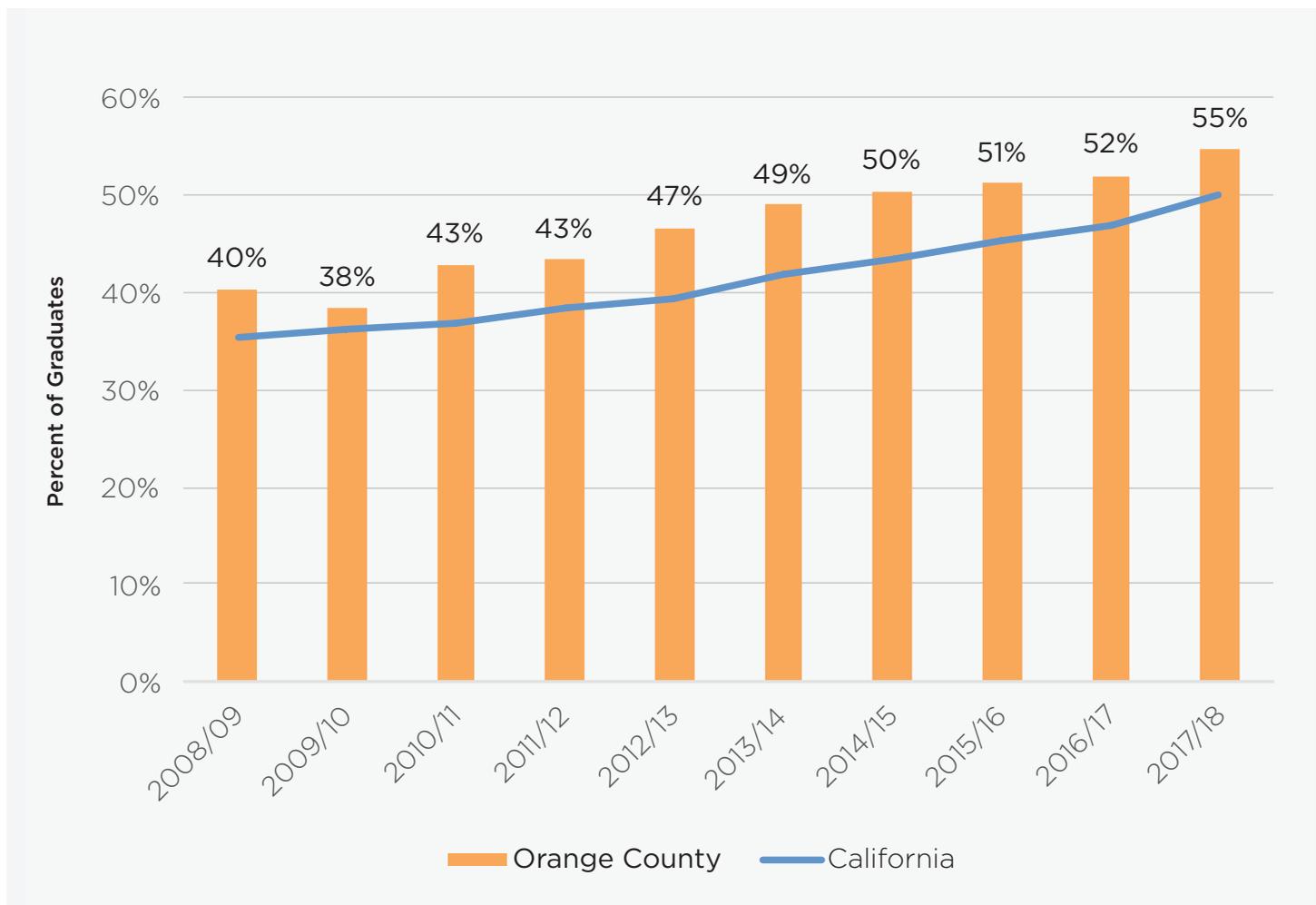
EDUCATION

COLLEGE AND CAREER READINESS

In 2017/18, more than half (55 percent) of Orange County students completed the necessary coursework to be eligible for admission to University of California (UC) or California State University (CSU) campuses. This rate is 11 percentage points higher than 10 years ago and surpasses the statewide rate of 50 percent.

UC/CSU ELIGIBILITY UP 11 PERCENTAGE POINTS OVER 10 YEARS

Percentage of High School Graduates that are UC/CSU Eligible in Orange County, 2008/09-2017/18

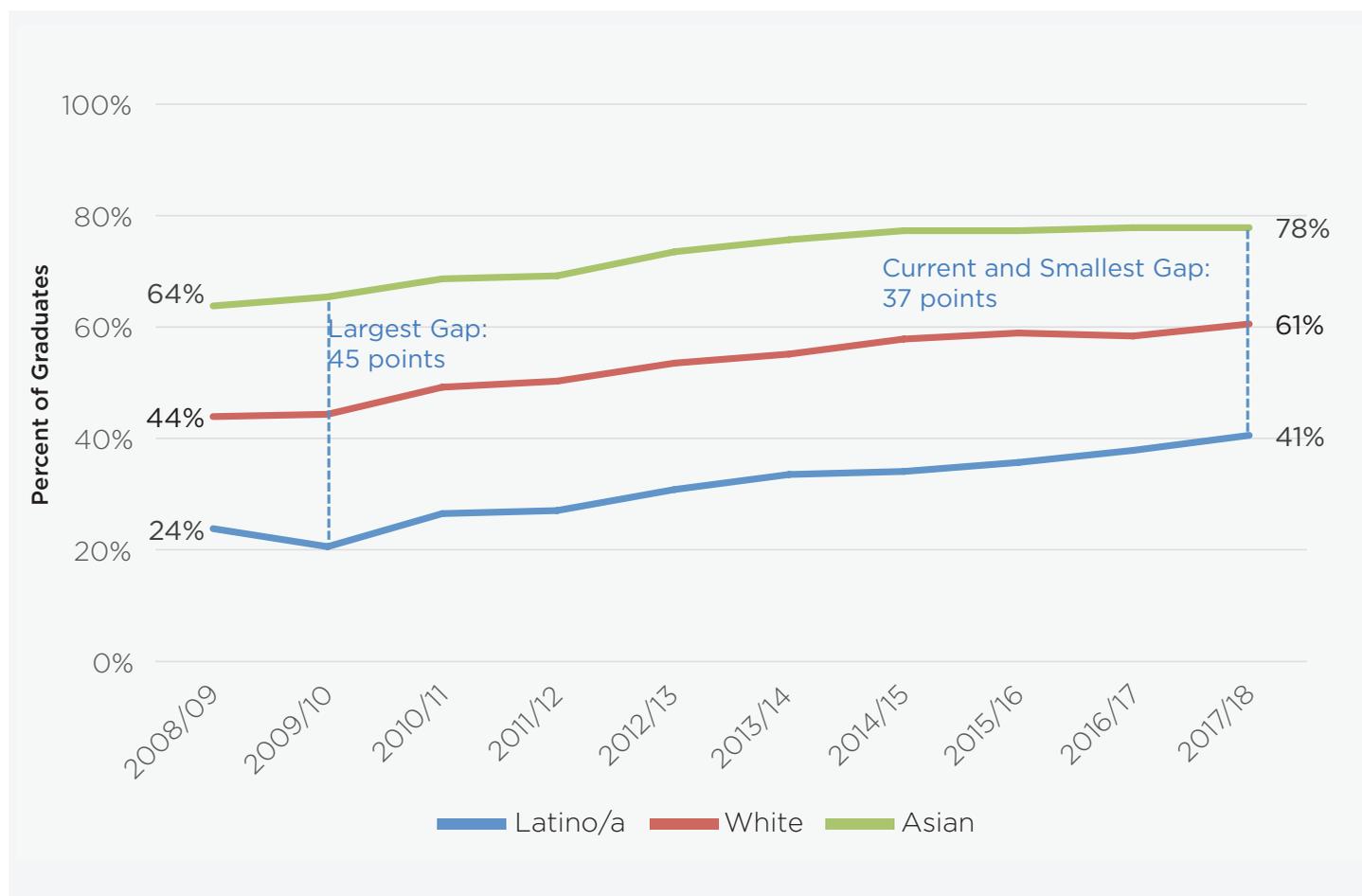


Source: California Department of Education, DataQuest

The long-term trend in college readiness for all races and ethnicities is gradual improvement, with Latino/a students making the largest gains. Among the county's three largest racial or ethnic groups - Latino, White, and Asian - Asian students graduating in 2017/18 were the most likely to be UC/CSU eligible (78 percent), followed by 61 percent of White students, and 41 percent of Latino/a students. The eligibility gap between Asian and Latino/a students narrowed by eight percentage points since the high of a 45-point gap in 2009/10 and the low of a 37-point gap in 2017/18.

GAP BETWEEN LATINO AND ASIAN STUDENTS NARROWS AGAIN IN 2017/18

Percentage of High School Graduates Eligible for UC/CSU by Race/Ethnicity in Orange County, 2008/09-2017/18



Source: California Department of Education, DataQuest



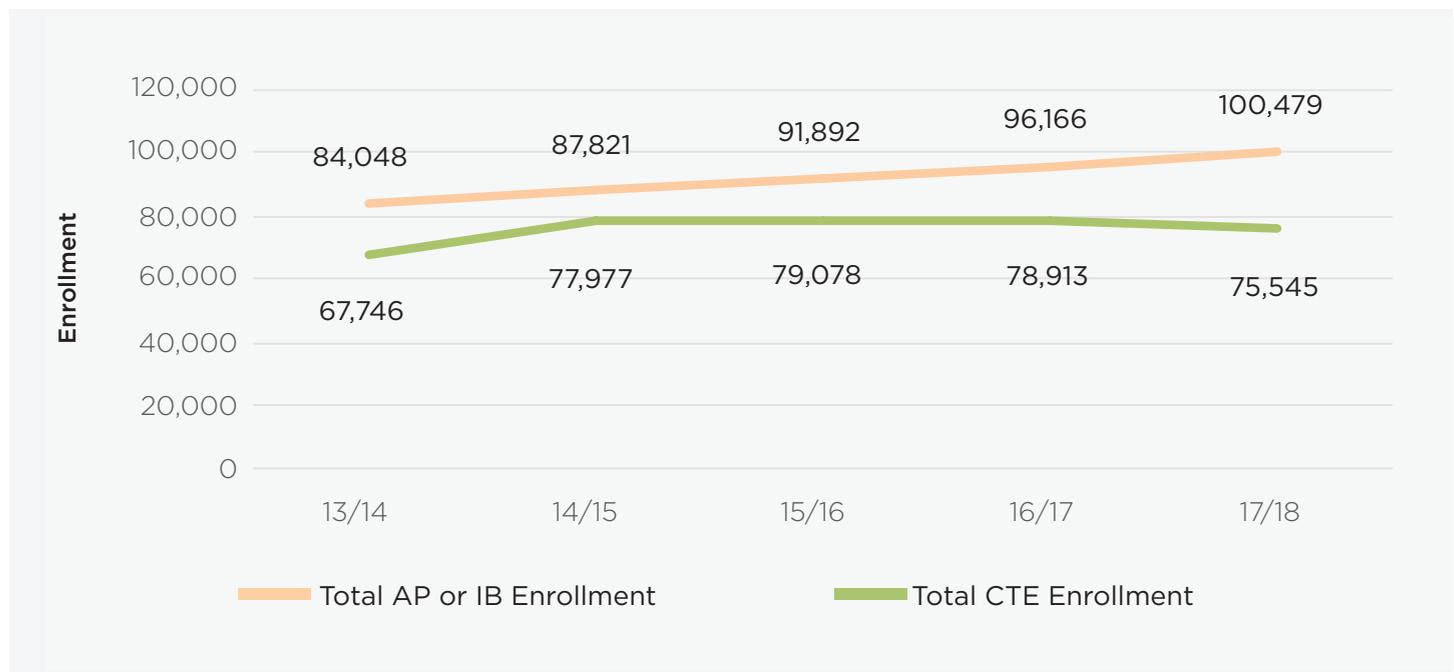
EDUCATION

Advanced Placement (AP) and International Baccalaureate (IB) course enrollment in Orange County high schools grew 20 percent in the five-year period between 2013/14 and 2017/18. While there are fewer enrollments in AP or IB drama than other subjects (604 in 2017/18), these courses saw the fastest 5-year growth (+266 percent), followed by 124 percent growth in computer education.

Since 2013/14, Orange County high school student enrollment in Career-Technical Education (CTE) courses grew by 12 percent, driven by substantial growth in several STEM-related industry sectors, including 217 percent growth in Engineering and Architecture, 176 percent growth in Information and Communication Technologies, and 126 percent growth in Health Science and Medical Technology. However, declines in other fields contributed to an overall year-over-year decline of 4 percent between 2016/17 and 2017/18.

RECENT DECLINE IN CTE ENROLLMENT; AP/IB ENROLLMENTS GROW STEADILY

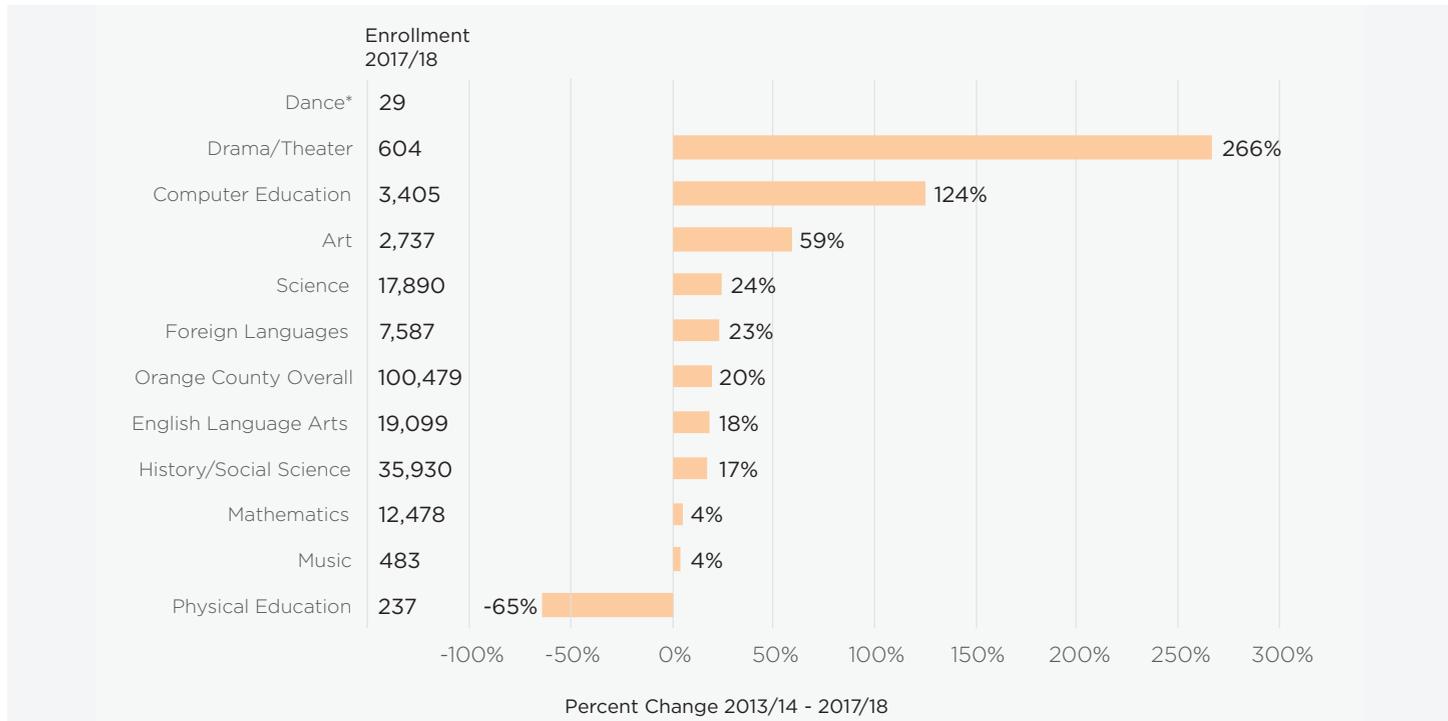
Enrollment in Career-Technical Education (CTE) and IB or AP Courses in Orange County High Schools, 2013/14-2017/18



Source: California Department of Education, DataQuest

AP/IB ENROLLMENTS IN IN DRAMA AND COMPUTERS GROW RAPIDLY

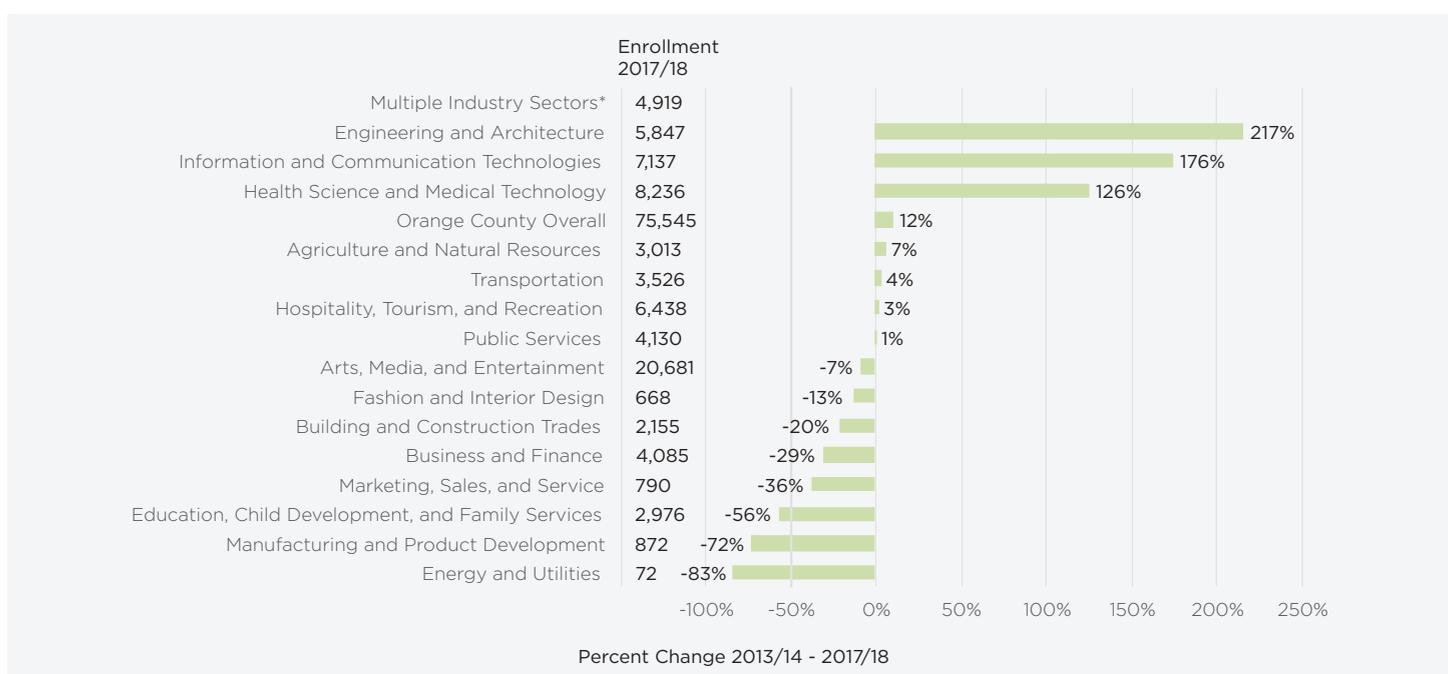
Enrollment (2017/18) and Change in Enrollment (2013/14 - 2017/18) in AP or IB Courses in Orange County High Schools by Subject



*Dance is a new subject as of 2017/18 therefore a percent change cannot be calculated. Source: California Department of Education, DataQuest

STEM-RELATED CTE COURSE ENROLLMENTS GROW SUBSTANTIALLY

Enrollment (2017/18) and Change in Enrollment (2013/14 - 2017/18) in Career-Technical Education (CTE) in Orange County High Schools by Industry Sector



*Multiple Industry Sectors is a new category as of 2017/18 therefore a percent change cannot be calculated. Source: California Department of Education, DataQuest

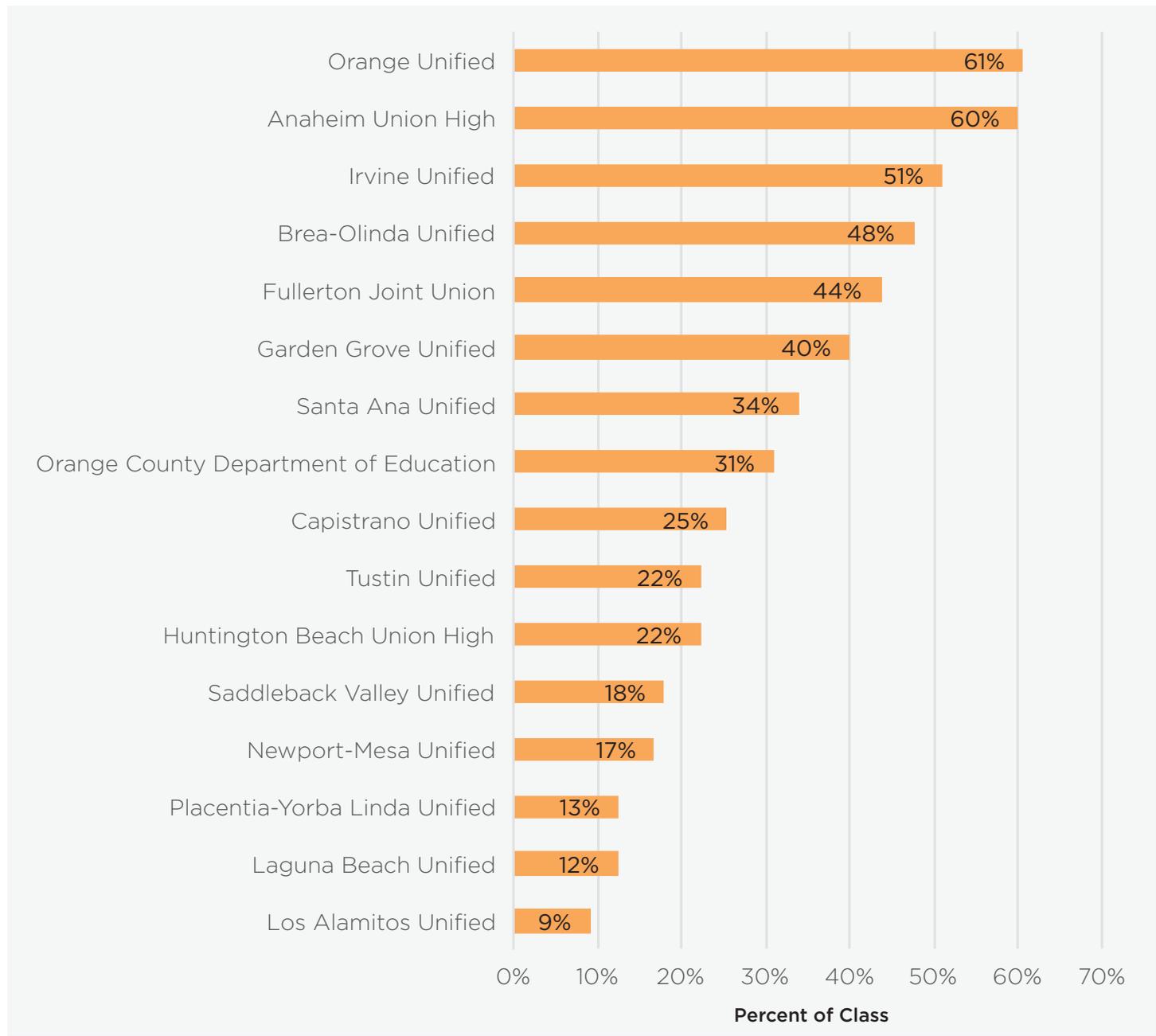


EDUCATION

Among students graduating from high school in 2018, Orange Unified and Anaheim Union High districts led the county in the proportion of graduates completing a Career-Technical Education (CTE) pathway – 61 percent and 60 percent, respectively. CTE Pathway completion requires the successful completion of a series of courses in an industry sector with a grade of a C minus or better in the last class of the series.

ORANGE AND ANAHEIM LEAD IN CTE PATHWAYS COMPLETIONS

Percentage of Class of 2018 Completing a CTE Pathway by District

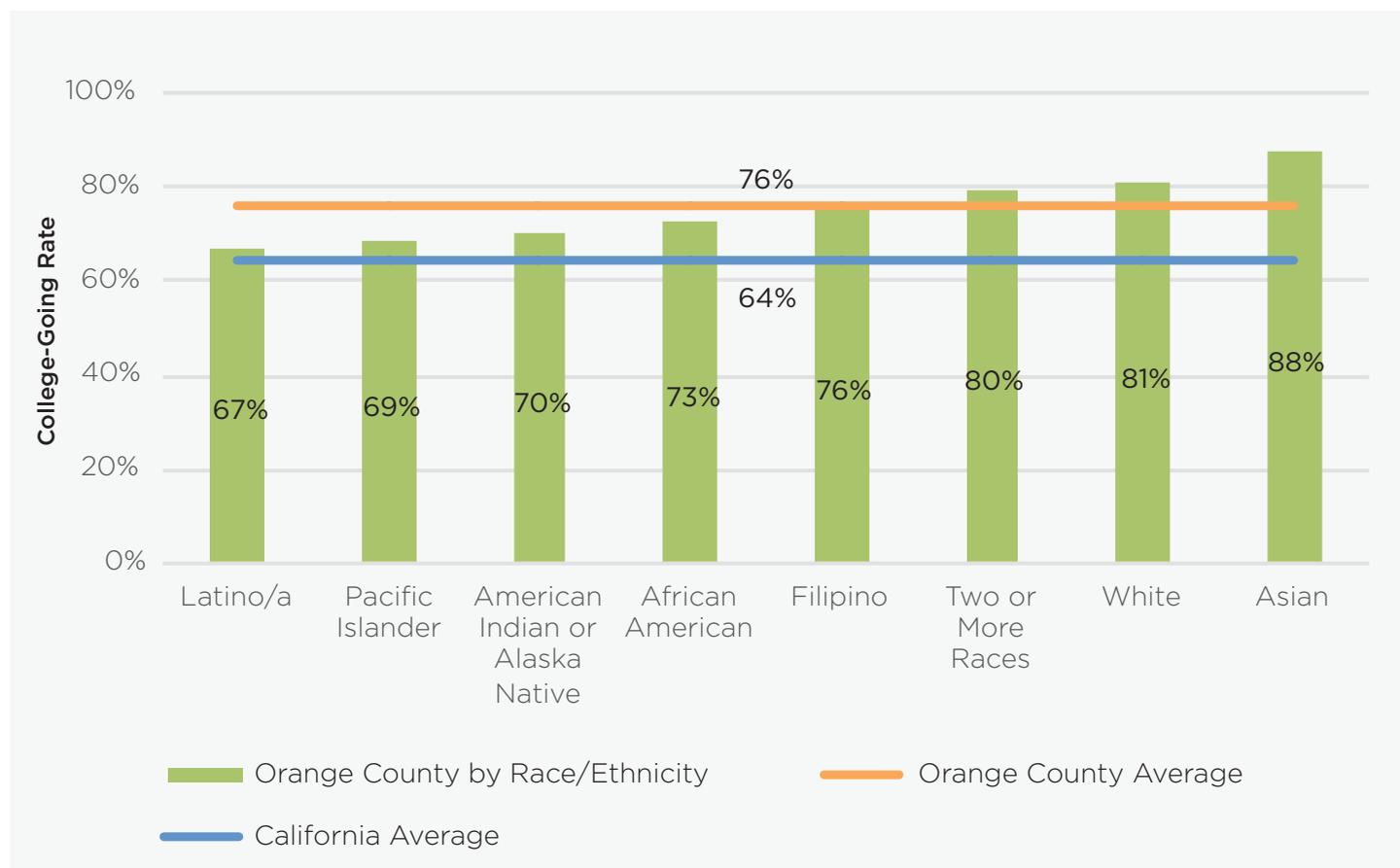


Source: California Department of Education, DataQuest

More than three-quarters (76 percent) of Orange County public high school graduates in 2017/18 enrolled in college within 12 months of completing high school, outpacing the statewide rate of 64 percent. Asian students had the highest rate at 88 percent, while Latino/a students had the lowest rate at 67 percent. Orange County's college-going rates have not changed substantially since tracking began in 2013/14.

76 PERCENT OF OC HIGH SCHOOL GRADS ATTEND COLLEGE

College-Going Rates Among Orange County Public High School Graduates by Race/Ethnicity, 2017/18



Source: California Department of Education, DataQuest

Data Notes

UC/CSU data presented by race/ethnicity have been revised since previously reported. UC/CSU data are for public high school graduates who have fulfilled minimum course requirements to be eligible for admission to University of California (UC) or California State University (CSU) campuses. "STEM" courses are in the fields of science, technology, engineering, and mathematics. College-going rates include attendance at public or private, 2- or 4-year colleges, and in-state or out-of-state.



EDUCATION

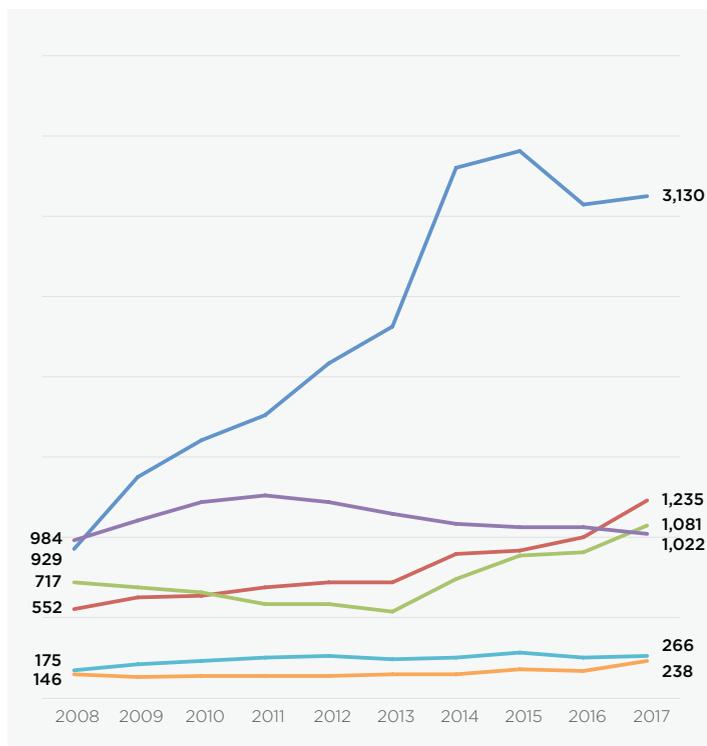
STEM-RELATED DEGREES

STEM-related degrees conferred by Orange County colleges and universities increased by 8 percent between 2016 and 2017, compared to only 3 percent growth for all degrees (STEM and non-STEM). The highest percent growth of STEM-related degrees occurred in the fields of mathematics and statistics (+26 percent) and engineering (+17 percent).

Over the past 10 years, all STEM-related fields experienced growth, with engineering and health degrees posting triple-digit growth rates between 2008 and 2017. STEM-related degrees accounted for 29 percent of all Orange County degrees in 2017, which is 8 percentage points higher than a decade earlier.

HEALTH PROFESSIONS AND ENGINEERING LEAD GROWTH IN STEM-DEGREES GRANTED

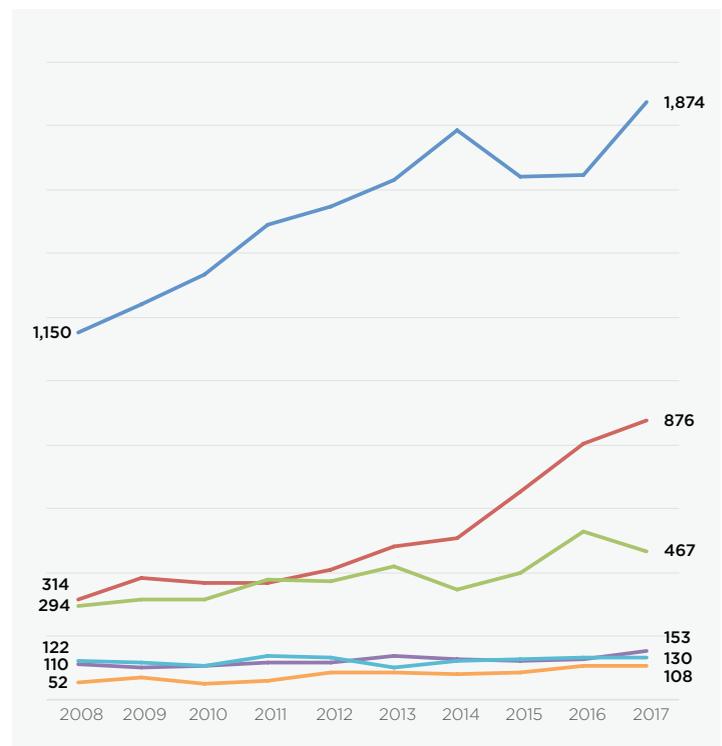
STEM-Related Bachelor's Degrees Conferred at Orange County Colleges and Universities, 2008-2017



Source: Economic Modeling Specialists International

- Health Professions
- Computer and Information Sciences
- Physical Sciences

STEM-Related Graduate Degrees Conferred at Orange County Colleges and Universities, 2008-2017

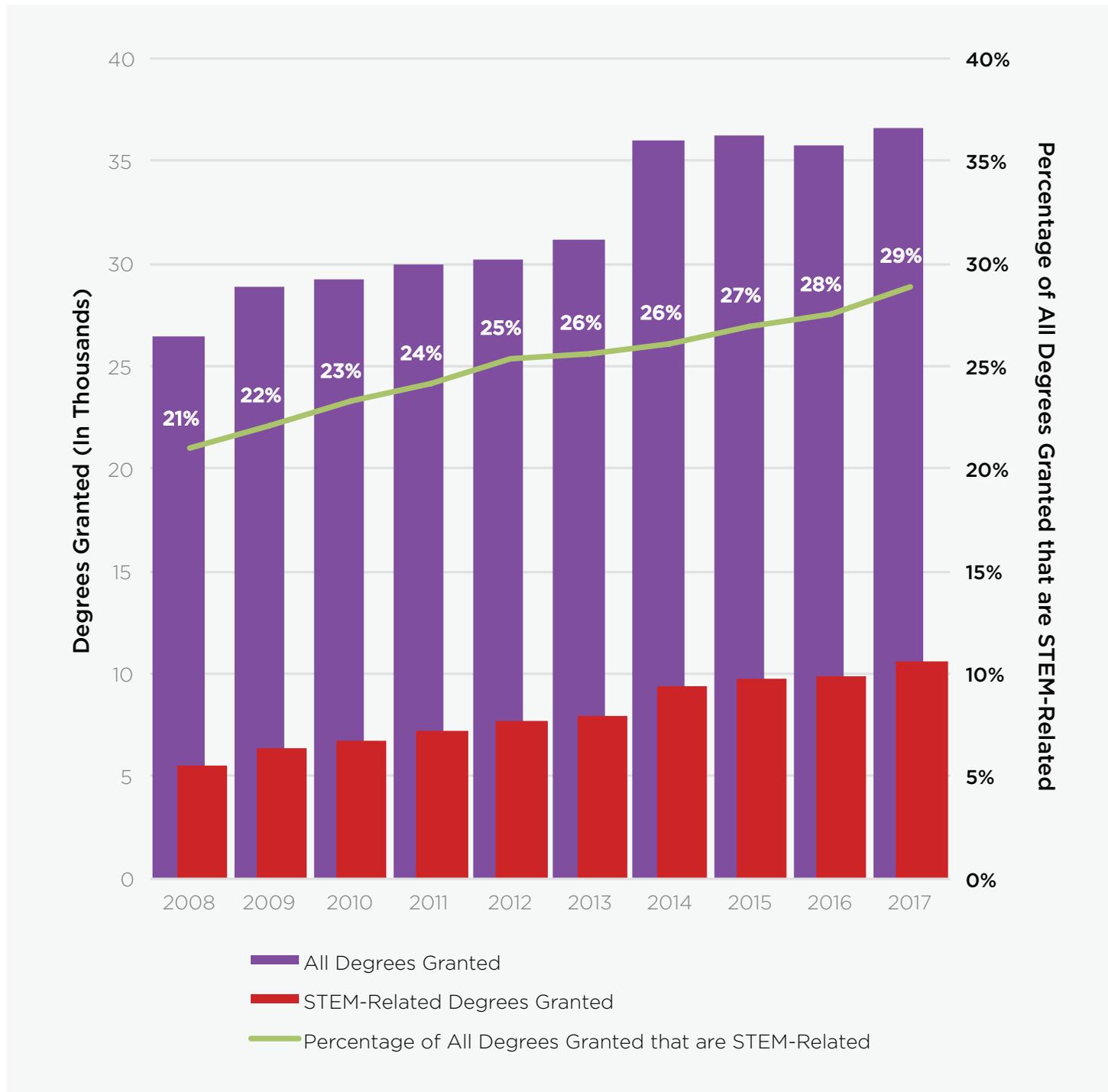


Source: Economic Modeling Specialists International

- Engineering
- Biological and Biomedical Sciences
- Computer and Information Sciences
- Health Professions
- Mathematics and Statistics

MORE DEGREES GRANTED COUNTYWIDE ARE STEM-RELATED

Bachelor's and Graduate Degrees Granted and Proportion that are STEM-Related in Orange County, 2008-2017



Source: Economic Modeling Specialists International

Data Notes

"STEM" degrees are those granted in the fields of science, technology, engineering, and mathematics. Data presented in this year's indicator should not be compared to data presented in previous Indicators Reports due to a data source change. Data are inclusive of Bachelor's, Master's, and Doctorate degrees granted at public, private, and for-profit 4-year degree granting institutions in Orange County. Data reflect degrees granted in a given school year, where 2017 represents degrees granted in the 2016/17 school year, for example.



**WHEN IT COMES TO BUILDING CAPITAL,
A TITAN EDUCATION YIELDS OPTIMAL RETURNS.**

CSUF'S Titan Capital Management center engages business majors in a high-tech, interactive environment that mirrors the trading floor of global financial institutions. Titans gain a competitive advantage with firsthand experience in portfolio management using real capital in real time. In this immersive experience, Titans gain applied knowledge — growth far greater than dollars.

TITANS REACH HIGHER

reachhigher.fullerton.edu/experience



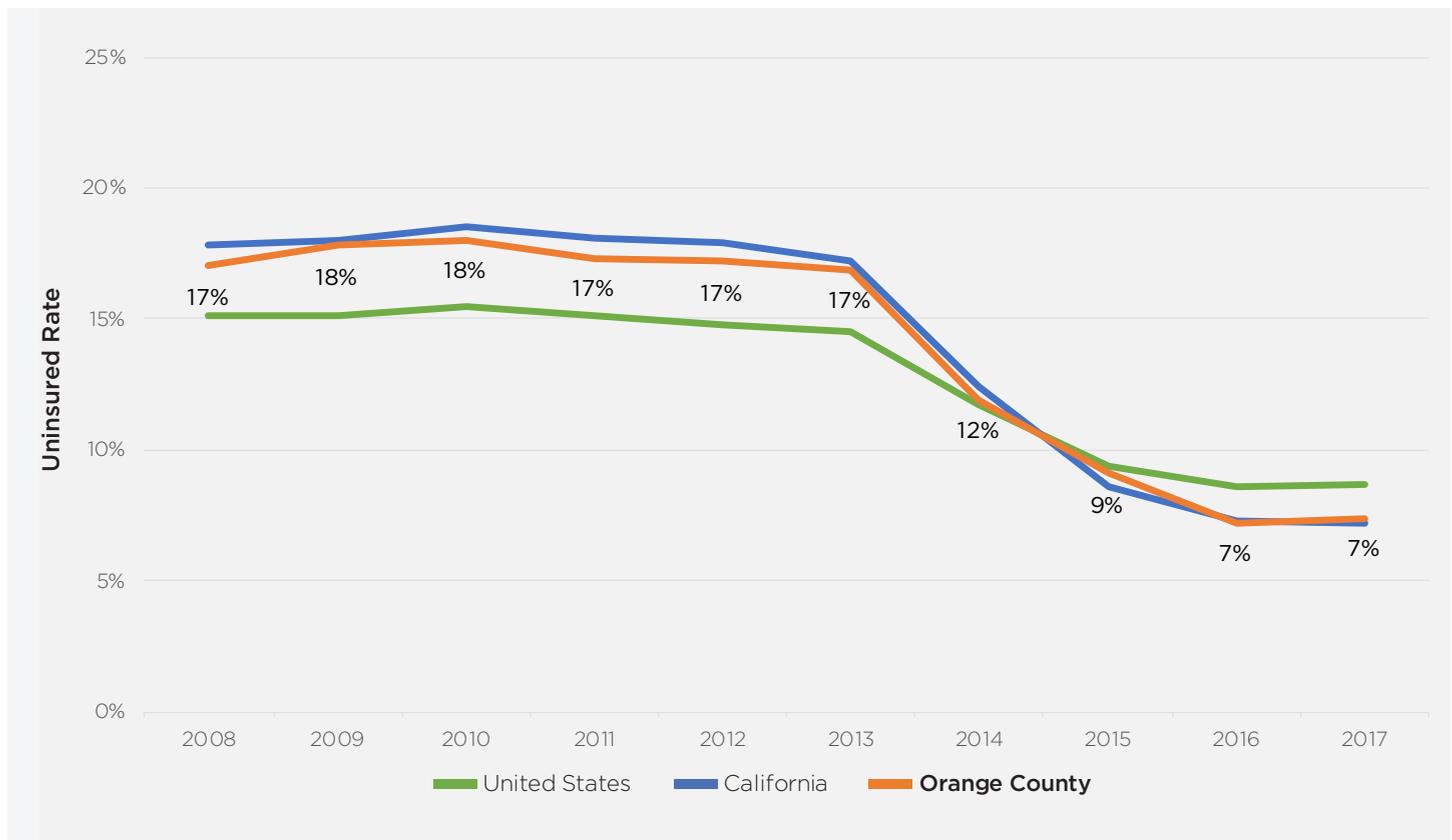
HEALTH

HEALTH CARE ACCESS

The percentage of uninsured Orange County residents remained relatively stable at 7 percent in both 2016 and 2017, after the Affordable Care Act drove a 10 point decrease between 2013 and 2016. Orange County's rate was on par with the state average and below the national rate of 9 percent.

RATE OF UNINSURED STEADY AT 7%

Uninsured (All Ages) in Orange County, California, and United States, 2008-2017



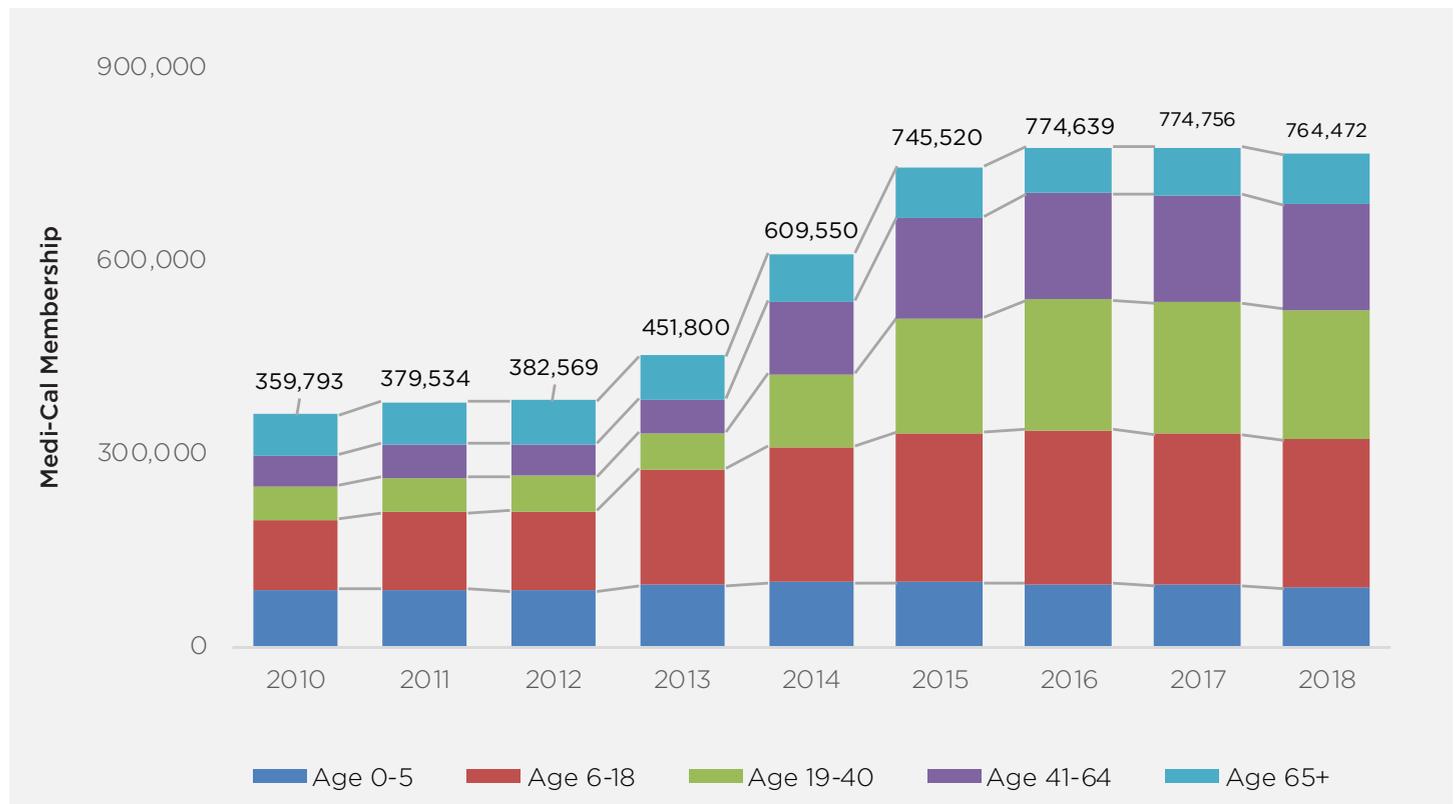
Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table S2701

Largely driven by the adoption of the federal Affordable Care Act (ACA) and the state Medi-Cal for All Children law, Orange County Medi-Cal enrollment increased 71 percent between 2013 (before ACA implementation) and its peak in 2017. During this period, adults ages 19-40 witnessed the sharpest increase in enrollment, growing 265 percent, followed by adults ages 41-64 (221 percent).

Since 2017, membership has tapered off, decreasing 1 percent between 2017 and 2018. The sharpest decline in membership since 2017 was among children ages 0-5, falling 4 percent on top of an identical decline the previous year; some of this decline can be attributed to declining birth rates. Only 3 percent of county children under six were uninsured in 2017, a lower proportion than other age groups. Overall, 764,472 county residents were enrolled in Medi-Cal in 2018.

MEDI-CAL MEMBERSHIP DIPS IN 2018

Medi-Cal Membership in Orange County, 2010-2018

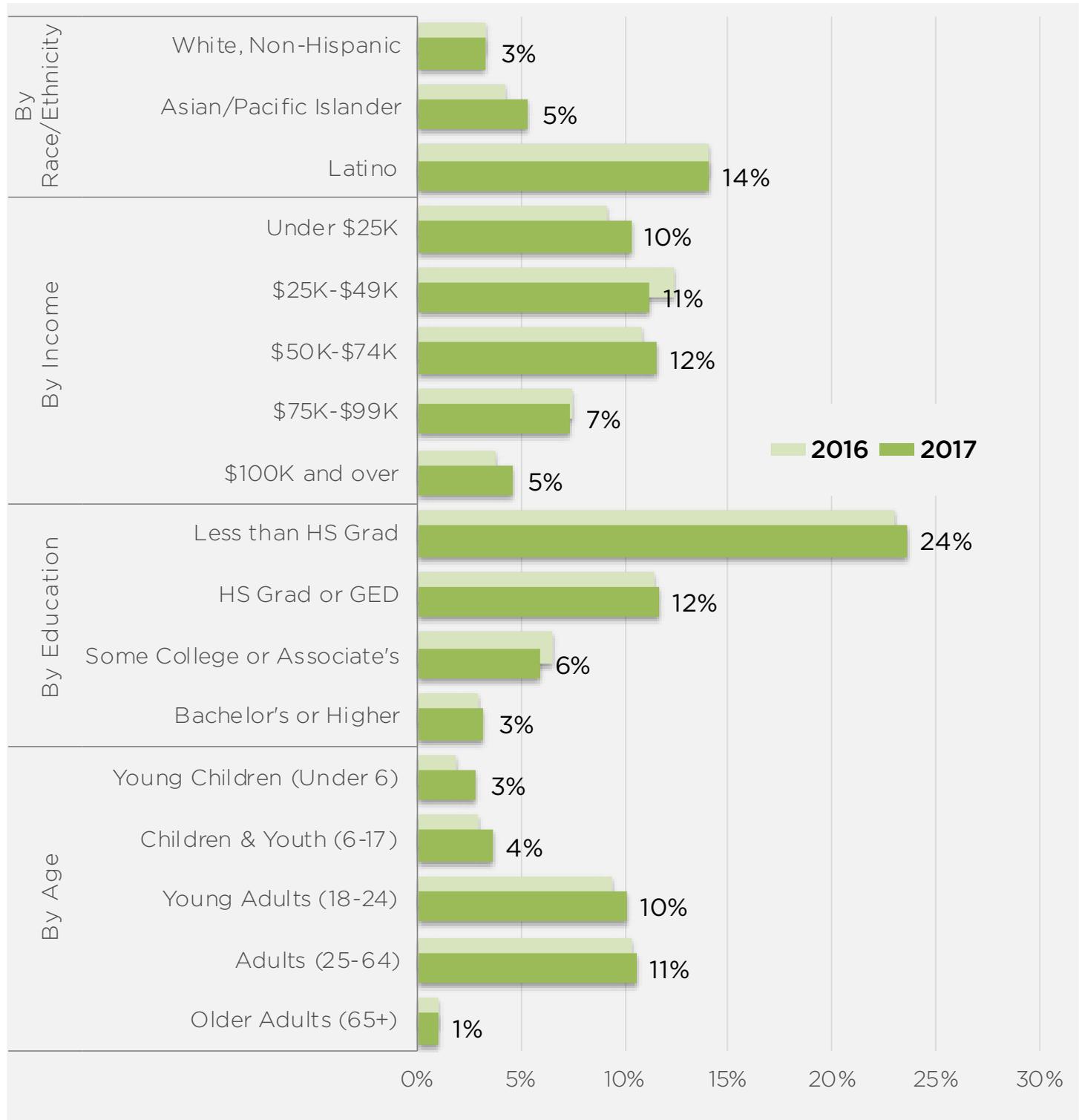


Source: CalOptima

When viewing insurance coverage by race and ethnicity, income level, educational status, and age, many groups experienced slight increases in the percentage of uninsured between 2016 and 2017. Nearly one-quarter of residents who did not complete high school lacked insurance in 2017 while 14 percent of Latino residents were uninsured. Adults ages 25-64 comprised the age group with the greatest proportion of uninsured (11 percent) and middle-income individuals (earning \$50,000-\$74,000) were most likely to be uninsured (12 percent).

1-IN-4 RESIDENTS WITHOUT A HIGH SCHOOL DIPLOMA AND 1-IN-7 LATINO RESIDENTS LACK INSURANCE

Uninsured in Orange County by Race/Ethnicity, Income, Education, and Age, 2016 and 2017



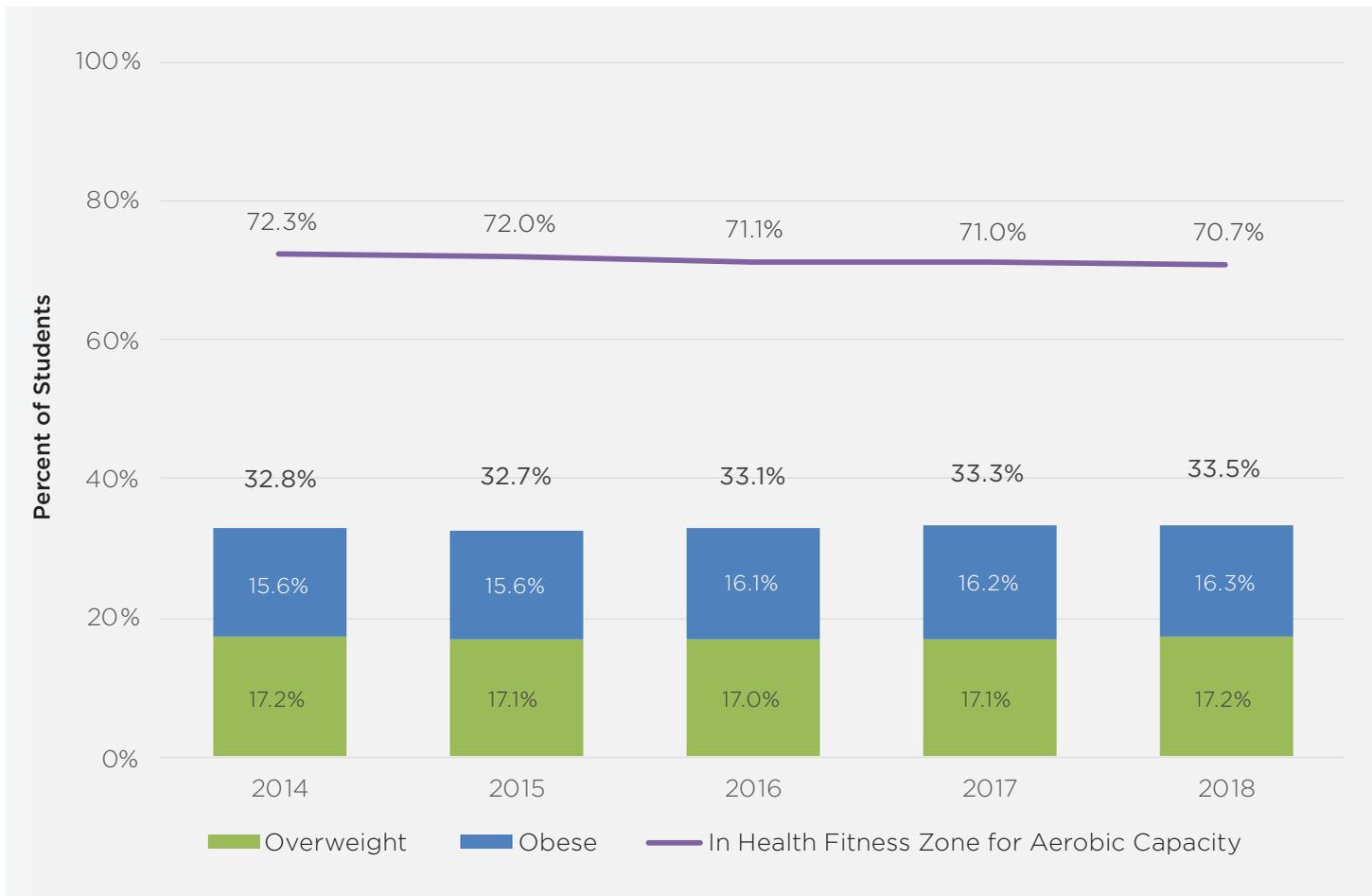
Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates, Table S2701

HEALTH & FITNESS

Two key health and fitness indicators for students point to gradually poorer health status. The proportion of students with obesity has increased 0.7 percentage points since 2014, while the proportion of students who are considered aerobically fit has declined 1.6 percentage points. In 2018, an average of 33.5 percent of Orange County students in 5th, 7th and 9th grades were overweight or obese and 70.7 percent were aerobically fit. Orange County's student weight status and aerobic capacity health indicators outperform the statewide rates (38.9 percent overweight or obese and 62.4 percent aerobically fit). Of the 33.5 percent of Orange County students who were overweight or obese in 2018, 16.3 percent were considered to be obese, while 17.2 percent were considered to be overweight. Santa Ana and Anaheim school districts had the highest proportion of overweight youth in 2018, while Irvine and Laguna Beach school districts had the lowest proportion.

STUDENT OBESITY UP; AEROBIC FITNESS DOWN

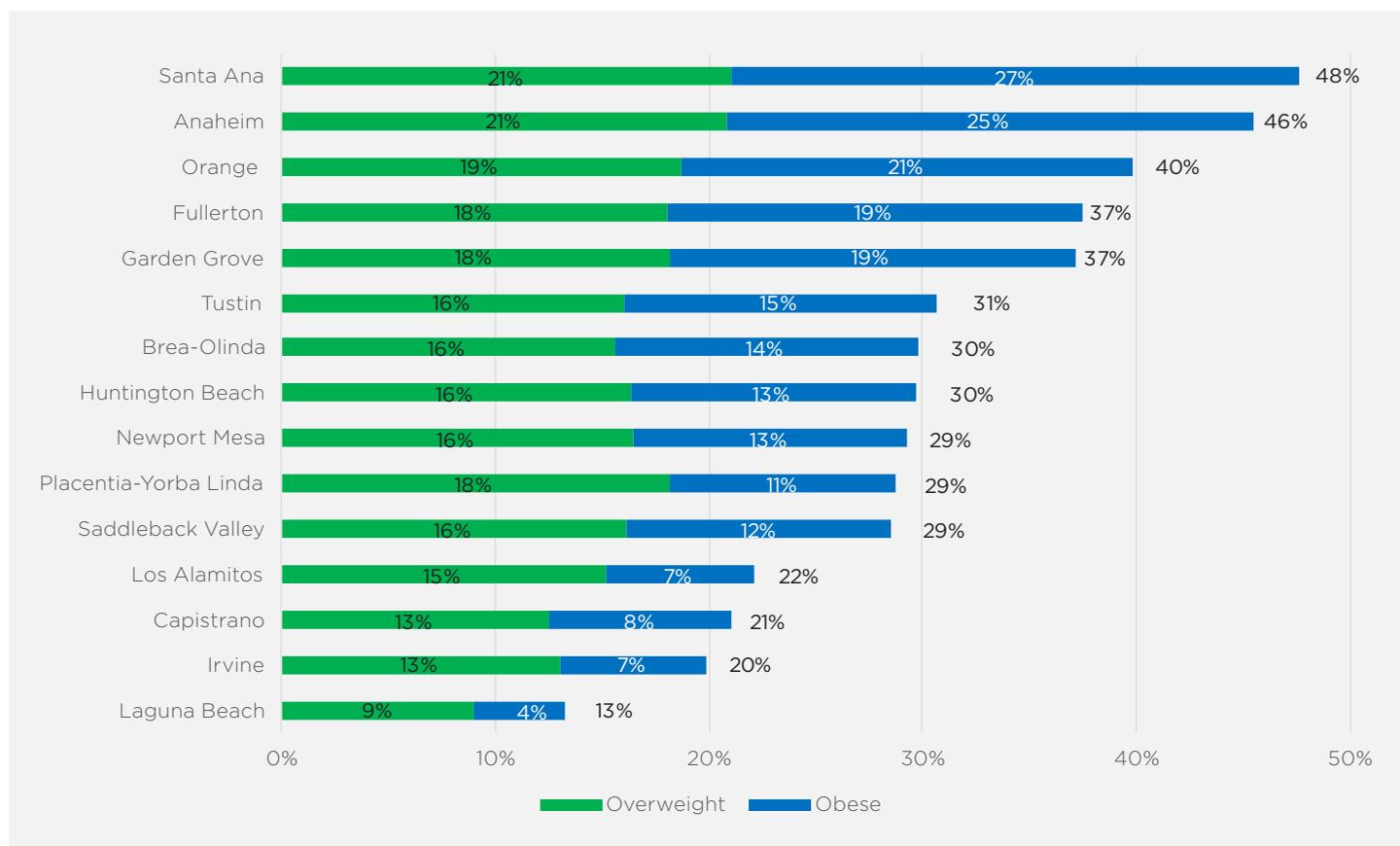
Percent of Orange County Students who are Overweight or Obese and Percent of Orange County Students in the Health Fitness Zone for Aerobic Capacity, 2014-2018



Source: California Department of Education Physical Fitness Test

CENTRAL ORANGE COUNTY DISTRICTS HAVE HIGHEST PROPORTION OF OVERWEIGHT OR OBESE STUDENTS

Percent of Students with Overweight or Obesity by School District in Orange County, 2018

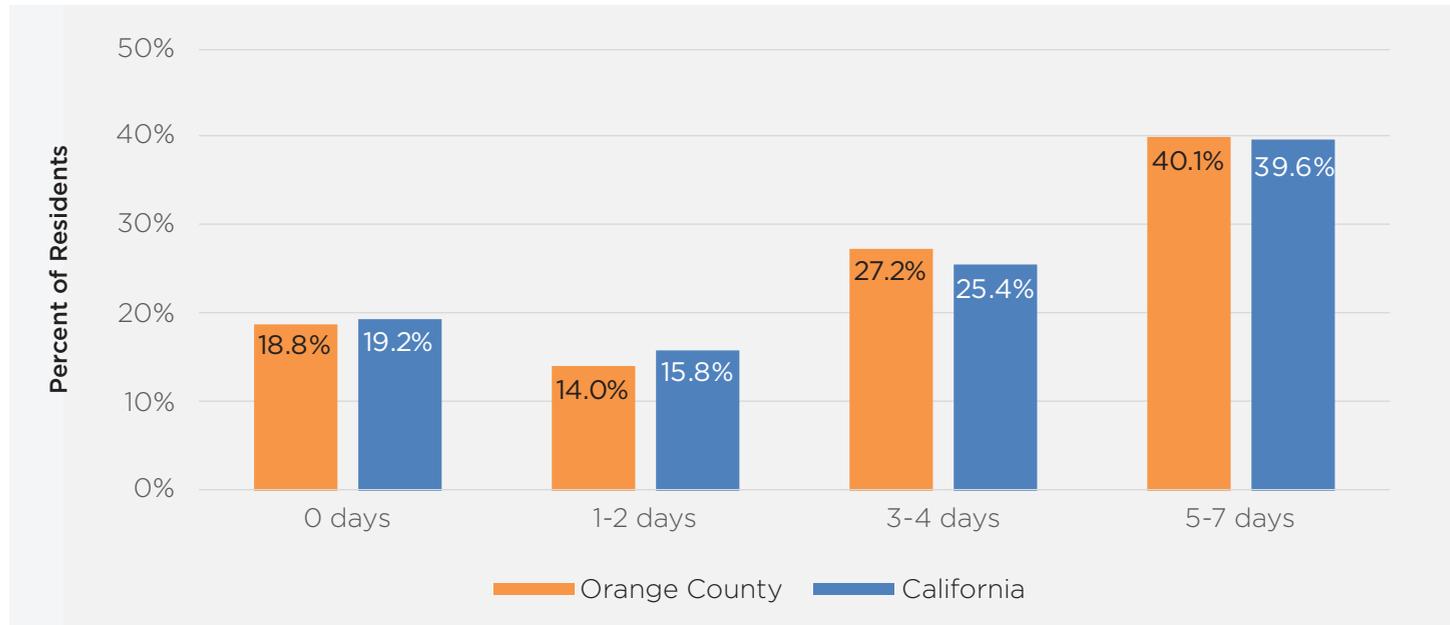


Source: California Department of Education Physical Fitness Test

Health and fitness indicators for adults are mixed. Data from 2017 reveal that most Orange County residents are physically active, with 40 percent getting at least 20 minutes of physical activity 5-7 days per week and 27 percent getting active 3-4 days per week. However, 19 percent (or approximately 1-in-5) are completely sedentary, getting no physical activity during the week. Orange County's physical activity indicators are slightly above statewide rates. Only 43 percent of Orange County adult residents are considered to have a healthy weight, while nearly one-third (34 percent) are considered overweight and 20 percent are obese. Statewide, the proportion of residents with a healthy weight in 2017 was 38 percent, compared to the nationwide proportion of 34 percent. Orange County, California, and the nation had the same proportion of overweight residents in 2017 (34 percent), while the rate of obesity was higher in the nation (30 percent) than in California (26 percent) and Orange County (20 percent). Since 2011, the weight status of county adults has fluctuated without a discernable trend emerging.

MOST RESIDENTS ARE ACTIVE, BUT 1 IN 5 ARE SEDENTARY

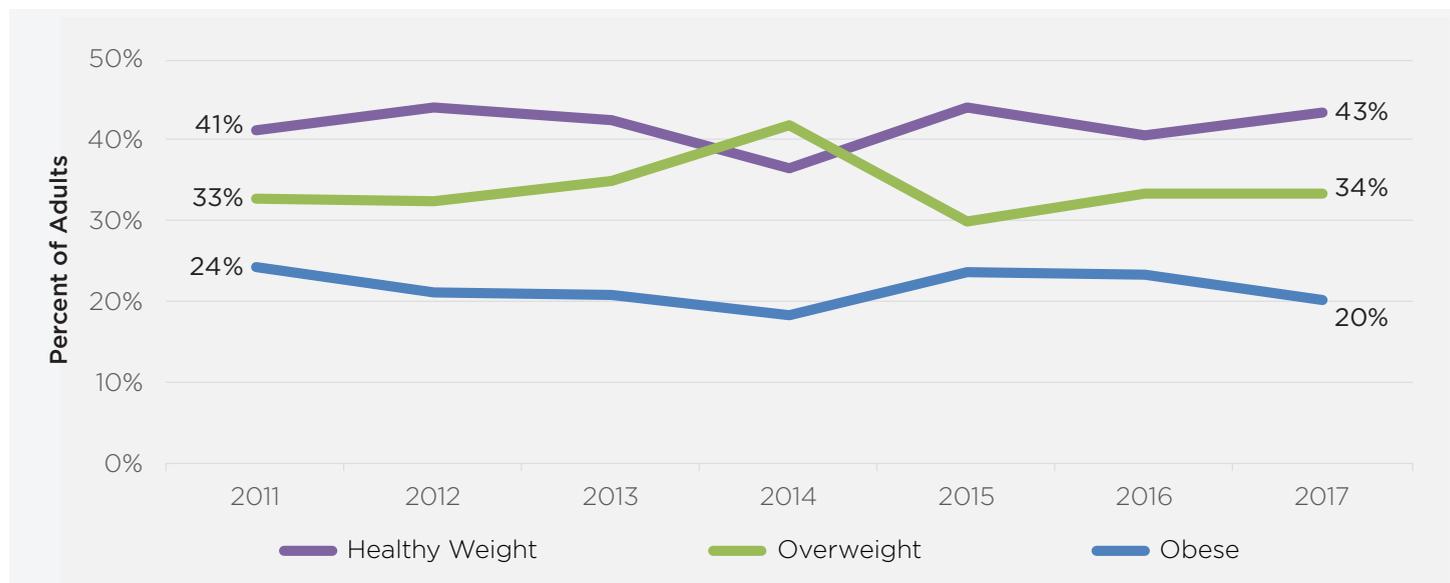
Number of Days Physically Active at Least 20 Minutes at a Time in the Past Seven Days for Adults in Orange County, 2017



Source: California Health Interview Survey

SINCE 2011 WEIGHT STATUS OF ADULTS HAS FLUCTUATED WITH NO DISCERNABLE TREND EMERGING

Weight Status of Adults in Orange County, 2011-2017



Source: California Health Interview Survey

Data Notes

Overweight and obesity data for students is determined by skinfold measurements, bioelectric impedance analyzer, and/or body mass index; data for adults is determined by body mass index. Aerobic capacity for students is determined by 20-meter PACER (Progressive Aerobic Cardiovascular Endurance Run), one-mile run, and/or walk test (only for ages 13 or older). For the physical activity measure for adults, survey respondents (who could walk) were asked "In the past 7 days, on how many days did you exercise for at least 20 minutes at a time?" Anaheim, Fullerton and Huntington Beach represent combined data of the high school districts and their feeder elementary school districts. Charter schools and Orange County Department of Education alternative programs are not included. National weight status data are sourced to the National Health Interview Survey. State and county weight status data are sourced to the California Health Interview Survey.

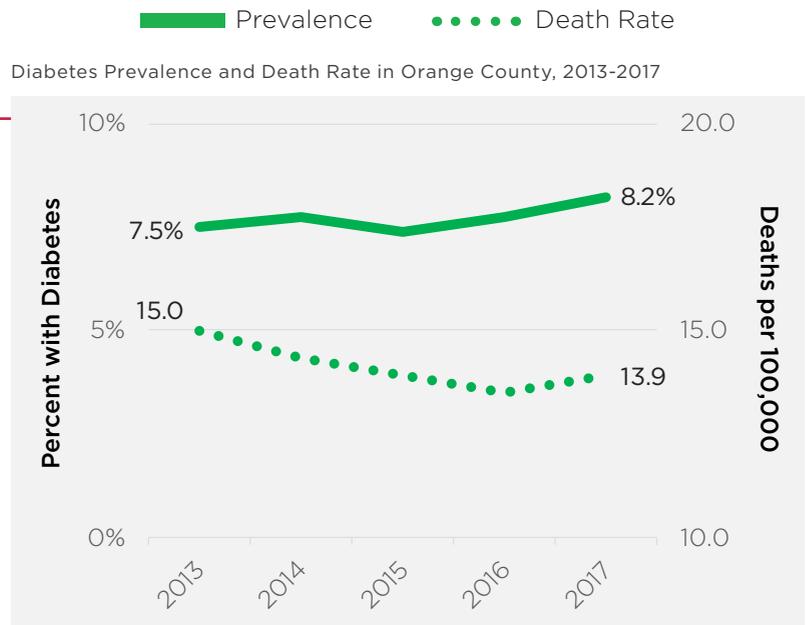
CHRONIC DISEASE

According to the Orange County Health Care Agency, chronic diseases contribute to approximately 60 percent of deaths in Orange County each year. Nationwide, the Centers for Disease Control and Prevention reports that chronic diseases account for about 86 percent of health-related costs. Four modifiable health risk behaviors – a sedentary lifestyle, poor nutrition, tobacco use, and excessive alcohol consumption – contribute to much of the illness, suffering, and early death related to chronic diseases. In Orange County, deaths due to diabetes, heart disease, and asthma continued to decline while stroke deaths increased. Over the past five years, prevalence rates (the percentage of residents living with a given condition) for heart disease, high blood pressure, and asthma do not show a clear trend, while the prevalence rate for diabetes appears to be trending upwards.

STROKE DEATHS INCREASE, WHILE TREND REMAINS DOWNWARD FOR DIABETES, HEART DISEASE, AND ASTHMA DEATHS

DIABETES

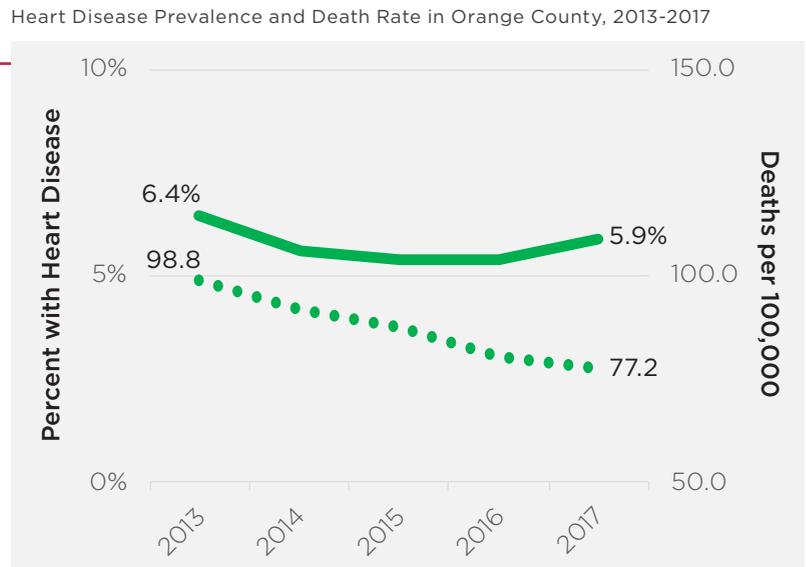
More adults had been diagnosed with diabetes in their lifetimes in 2017 (8.2 percent) than in 2013 (7.5 percent). There was a 7 percent decline in the diabetes death rate over the same period.



Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles

HEART DISEASE

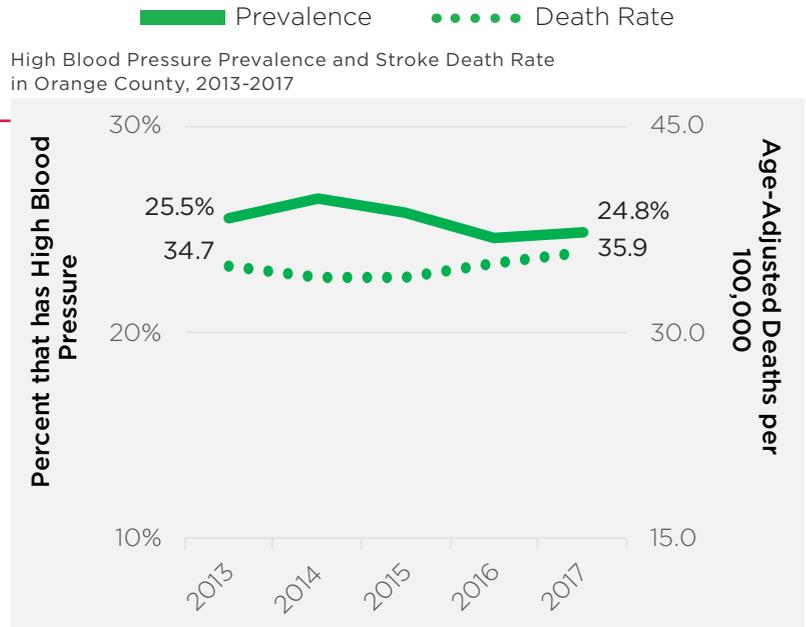
The percentage of Orange County adults with heart disease declined from 6.4 percent in 2013 to 5.9 percent in 2017. Meanwhile, medical advances have led to a 22 percent decline in the death rate for heart disease over the same period.



Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles

HIGH BLOOD PRESSURE/STROKE

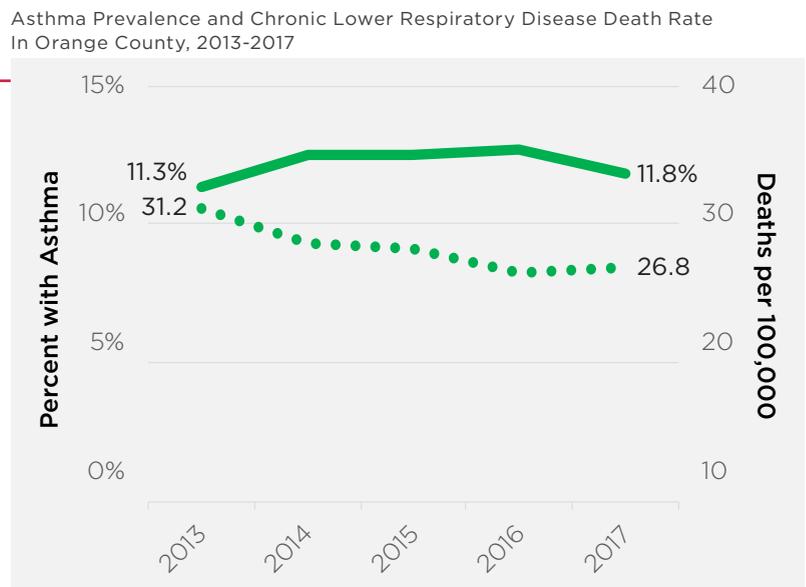
The percentage of Orange County adults who have high blood pressure (the most important treatable risk factor for stroke) fell slightly between 2013 and 2017. Over the same period, the death rate for stroke rose 3 percent.



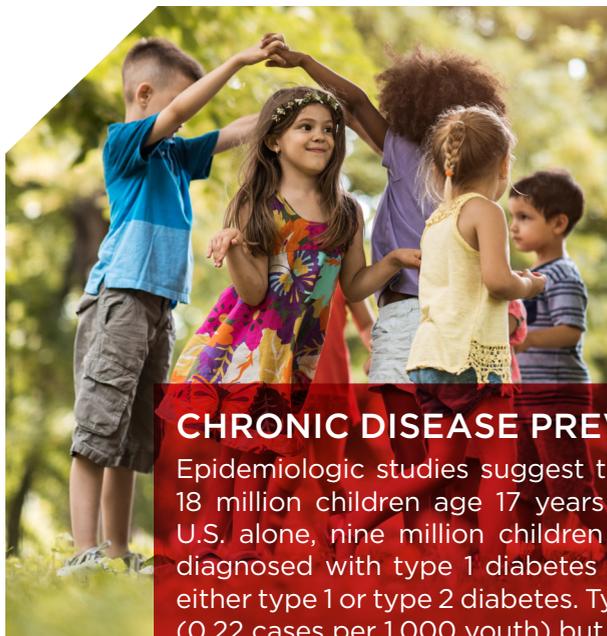
Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles

ASTHMA/CHRONIC LOWER RESPIRATORY DISEASE

Asthma prevalence was slightly higher in 2017 than five years prior. However, deaths due to chronic lower respiratory disease (which includes asthma) declined 14 percent.



Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles



CHRONIC DISEASE PREVALENCE IN CHILDREN

Epidemiologic studies suggest that as many as one out of four children in the U.S., or 15 to 18 million children age 17 years and younger, suffer from a chronic health problem. In the U.S. alone, nine million children suffer from asthma and approximately 13,000 children are diagnosed with type 1 diabetes annually. As many as 200,000 children nationwide live with either type 1 or type 2 diabetes. Type 2 diabetes is still extremely rare in children and adolescents (0.22 cases per 1,000 youth) but these rates are increasing rapidly with rising obesity rates.

Data Notes

Prevalence and death data reflect rolling (overlapping) three-year averages. For example, "2015" is an average of 2013, 2014 and 2015 data, and "2014" is an average of 2012, 2013 and 2014 data. The death data shown are age-adjusted rates, which controls for regional variability in age composition.

MENTAL HEALTH AND SUBSTANCE ABUSE

While the hospitalization rate for mental health concerns has remained relatively steady over the past decade, two groups - older adults and youth - have experienced significant shifts. The hospitalization rate among adults age 65 and older declined 32 percent since 2008. Conversely, the hospitalization rate among children and youth (0-17) increased by 85 percent since 2008. These trends were driven by a 160 percent rise in depression and mood disorder hospitalizations among youth and a 44 percent decline among older adults.

There was a 14 percent increase in substance abuse-related hospitalizations since 2008. Hospitalization rates for adults ages 18-64 rose 16 percent, while rates fell by 71 percent for youth and 2 percent for older adults. Meanwhile, deaths due to substance abuse have increased. Between 2008 and 2017, the drug-induced death rate grew by 33 percent while deaths due to chronic liver disease and cirrhosis, which is associated with alcohol abuse, rose 15 percent.

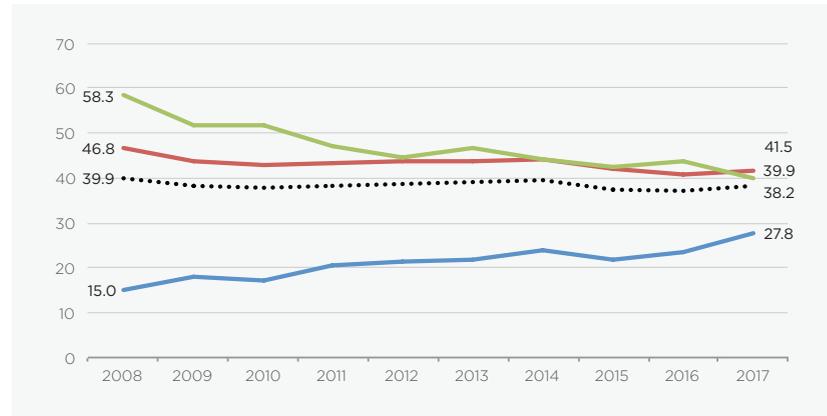
Collectively, mental health and substance abuse-related hospital admissions made up 6 percent of all Orange County hospitalizations in 2017, in line with the past decade's average. Compared to California, Orange County's mental health and substance abuse-related admission rate of 51.3 per 10,000 residents in 2017 is less than the statewide rate of 64.5 per 10,000.

Suicide deaths - an extreme indicator of untreated major depression or mood disorders - fell for the third consecutive year to 9.3 deaths per 100,000 in 2017. Over the past 10 years, however, the suicide death rate has increased 5 percent.

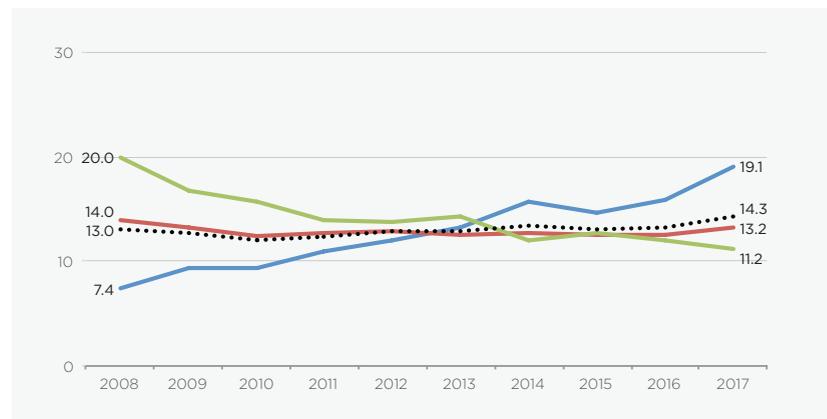
YOUTH DEPRESSION HOSPITALIZATIONS CONTINUE TO RISE

Children and Youth Adults Older Adults All

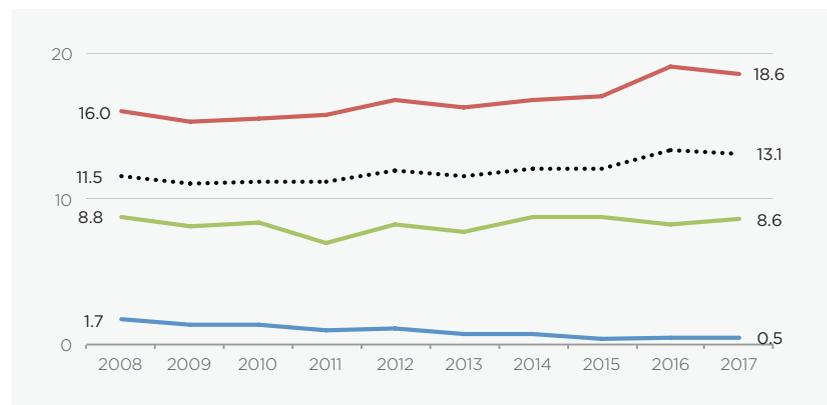
Overall Mental Illness Hospitalizations per 10,000 by Age in Orange County, 2008-2017



Major Depression and Mood Disorders Hospitalizations per 10,000 by Age in Orange County, 2008-2017



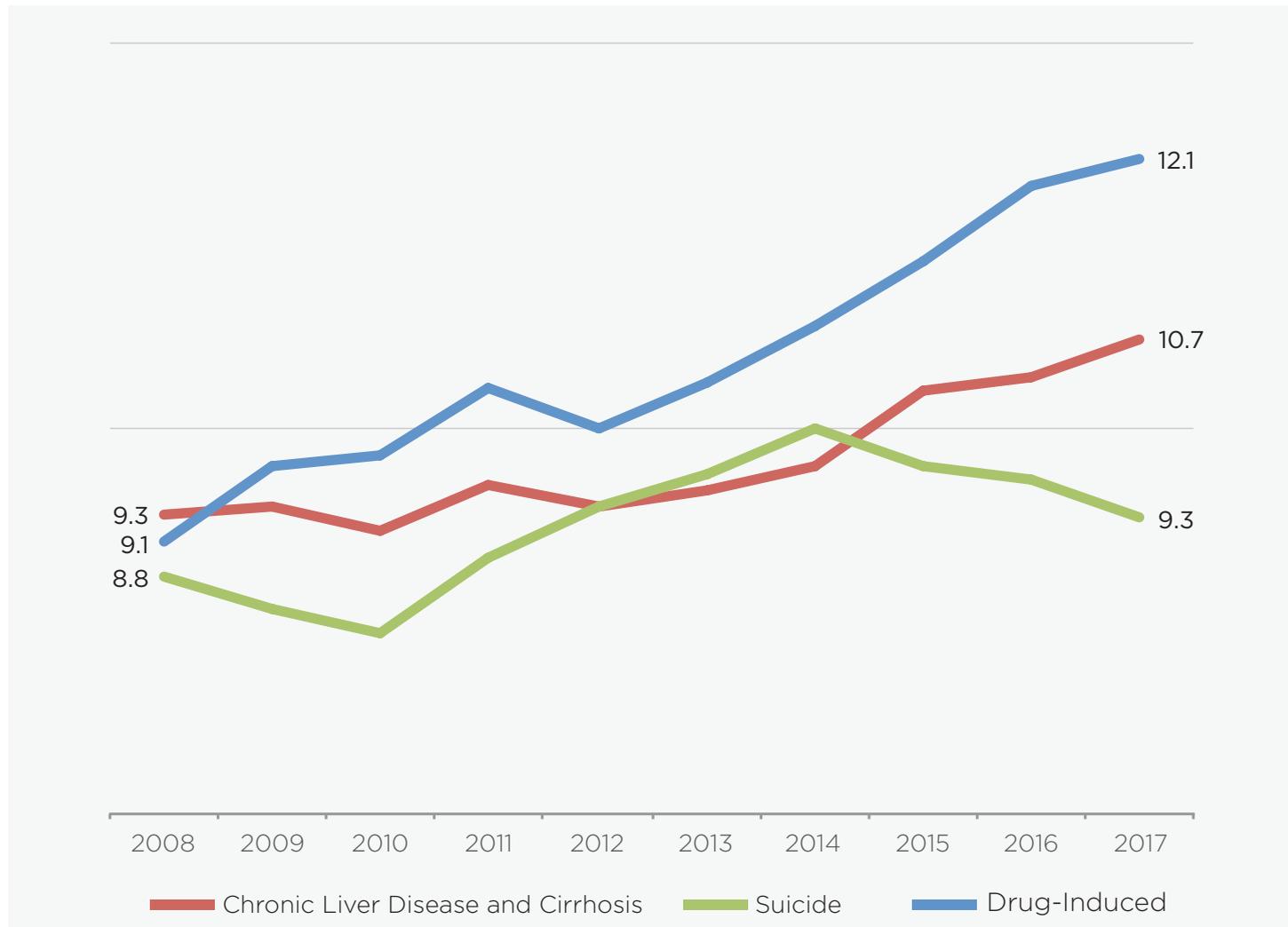
Substance Abuse Hospitalizations per 10,000 by Age in Orange County, 2008-2017



Sources: Office of Statewide Health Planning & Development Patient Discharge Data prepared by Orange County Health Care Agency, Research and Planning; California Department of Finance; U.S. Census Bureau, American Community Survey

SUBSTANCE-RELATED DEATH RATES CONTINUE TO RISE

Mental Health and Substance Abuse-Related Deaths per 100,000 in Orange County, 2008-2017



Source: California Department of Public Health, County Health Status Profiles

ORANGE COUNTY DOUBLES DOWN ON MENTAL HEALTH TREATMENT AND SUICIDE PREVENTION

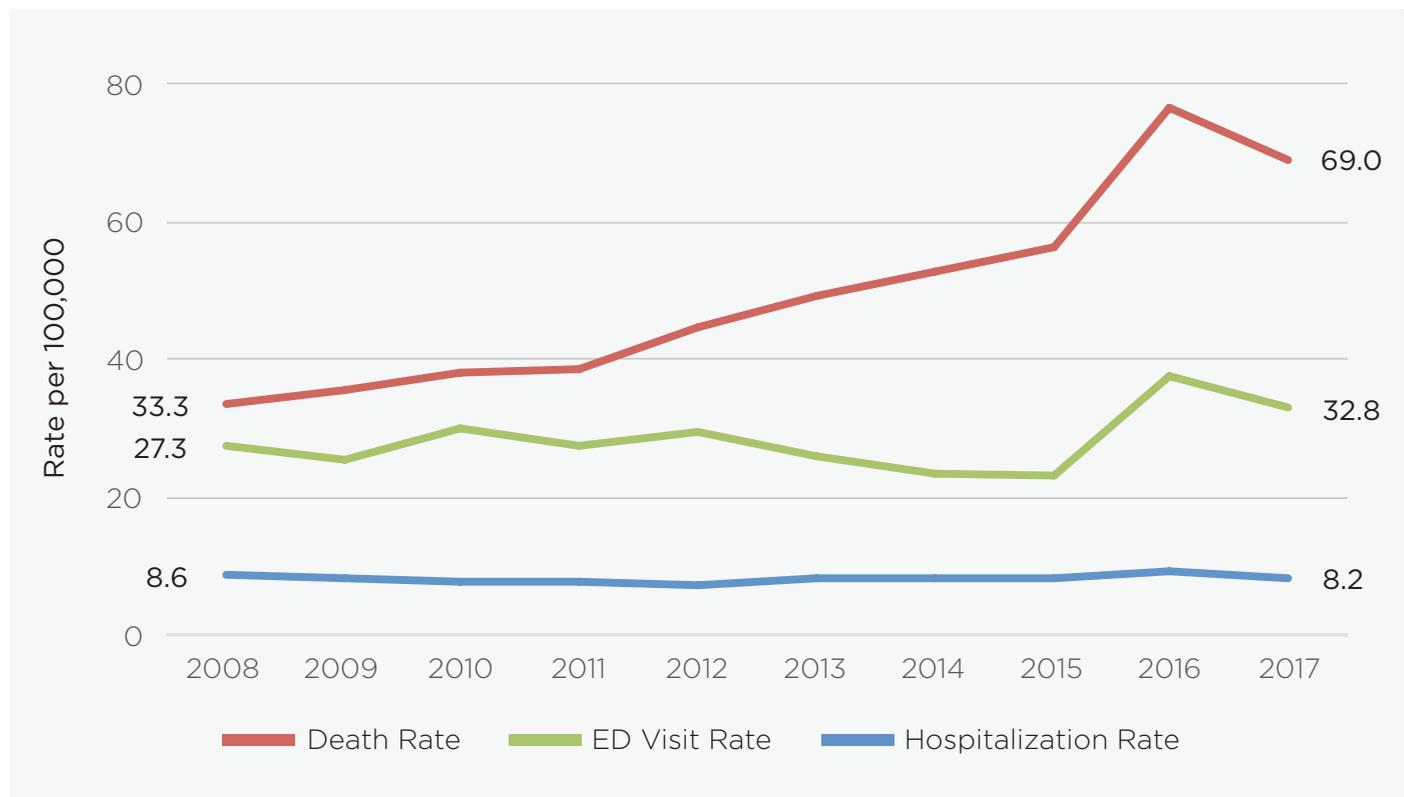
In response to the troubling trends in mental health in Orange County, the County of Orange, CalOptima, Kaiser Permanente, and St. Joseph Hoag Hospital are partnering to build the 60,000 square foot Be Well Orange County Regional Mental Health and Wellness Campus, a mental health center and psychiatric emergency room slated to open in 2020 in Orange. This important investment in mental health treatment comes on the heels of another groundbreaking recent addition to Orange County’s mental health treatment landscape – the CHOC Children’s mental health inpatient center for children under 12, the first of its kind in Orange County. The County of Orange also recently devoted funds for the first countywide suicide prevention program operated by MindOC, which seeks to increase awareness, provide resources to those in need, and support existing programs.

Source: LA Times/Daily Pilot, March 12, 2019

OPIOIDS IN ORANGE COUNTY

- Nationwide, deaths due to opioids increased 11 percent between 2016 and 2017.
- Currently (2017), the national opioid death rate is nearly double (1.8 times higher) Orange County's opioid death rate.
- Orange County's emergency department (ED) visit rate for opioid overdose or abuse increased 107 percent since 2008, while hospitalizations increased 20 percent.
- Accidental overdose of prescription opioids is a major driver of injury and death in Orange County.
- Opioid-related emergency visits, hospitalizations, and overdose deaths in Orange County experienced a sharp decrease from 2016 to 2017.
- Although natural/semi-synthetic opioids are the majority type of opioids involved in opioid-related overdose deaths (54.8 percent), the trend has decreased 28 percent since 2011.
- Heroin-related overdose deaths have increased 159 percent since 2012 in Orange County.
- Narcotic prescription data from the California Department of Justice show that opioids account for nearly half (43 percent) of all reported prescriptions in Orange County.
- Over 1.67 million opioid prescriptions were dispensed in 2017 to Orange County residents, a 5 percent decrease over the previous year.
- Areas of Orange County with the highest opioid prescription rates also tended to have highest rates of ED visits for opioid poisoning or abuse.

Rate of Opioid-Related Emergency Department (ED) Visits, Hospitalizations, and Deaths in Orange County, 2008-2017



Sources: California's Office of Statewide Health Planning and Development Emergency Department and Patient Discharge Data (ED/hospitalization data); CDC Wonder (death data)



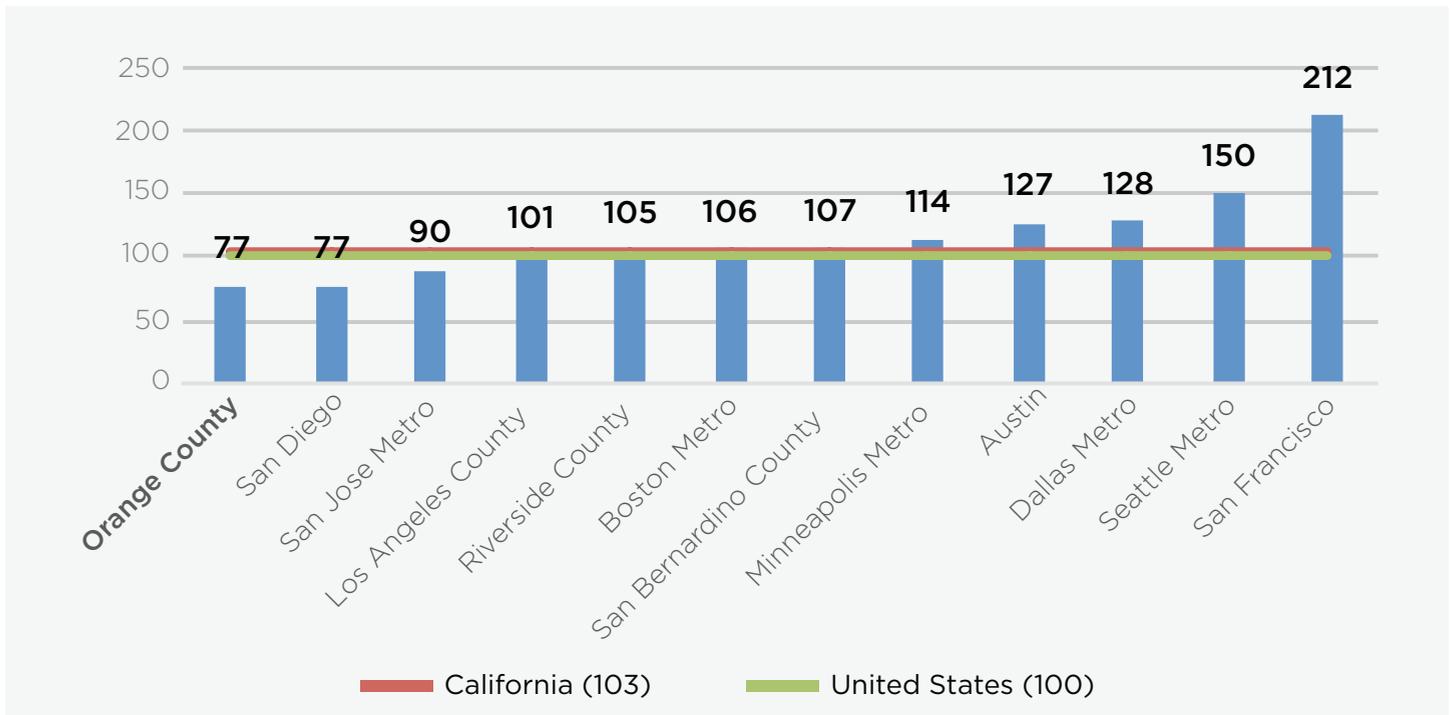
SAFETY

CRIME RATE

Overall, Orange County's crime index score of 77 is lower than the state, nation, and all other peer regions compared with the exception of San Diego, which also had a crime index score of 77. The crime index includes violent crimes (homicide, rape, robbery, and aggravated assault) and property crimes (burglary, larceny-theft, and motor vehicle theft). As illustrated in the map on the next page, most Orange County communities' crime index scores also fall below the national average.

CRIME IN ORANGE COUNTY IS MORE THAN 20 PERCENT LOWER THAN THE STATE AND NATION

Regional Comparison of Crime Index Scores, 2019

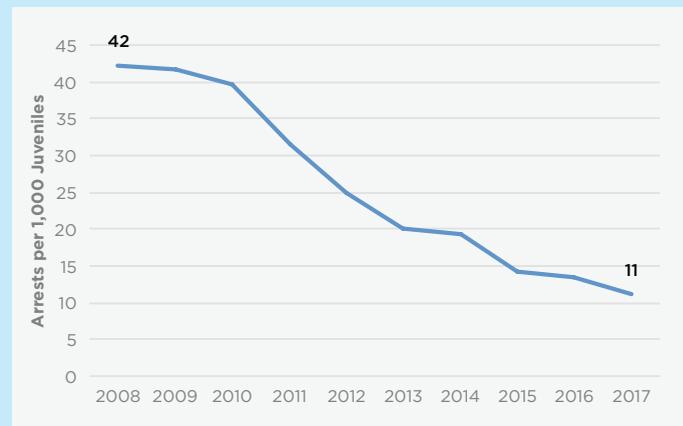


Note: An index value of 100 represents the national average. The crime index is a compilation and analysis of the FBI Uniform Crime Report 2010-2017 databases, prepared by Applied Geographic Solutions (AGS). Source: Esri Crime Index, 2019

DRAMATIC 10-YEAR DECLINE IN JUVENILE ARRESTS

Juvenile (Ages 10-17) Arrest Rate in Orange County, 2008-2017

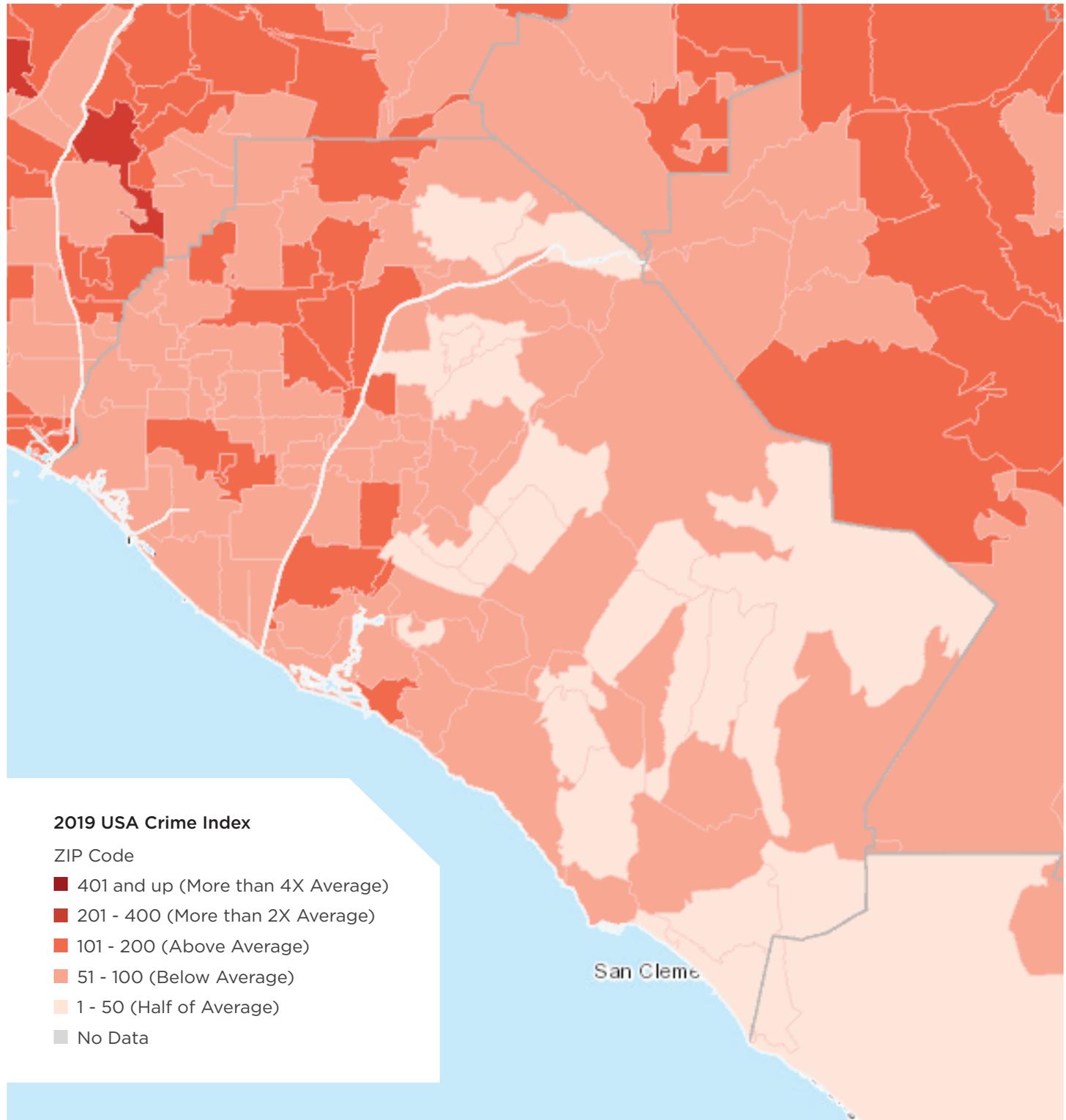
In 2017, there were 11 arrests per 1,000 juveniles in Orange County, less than the statewide rate of 13 arrests per 1,000 juveniles. Orange County's juvenile arrest rate equates to a total of 3,772 juvenile arrests in 2017, down significantly from the 14,927 juvenile arrests 10 years earlier in 2008. Juvenile arrests comprised 4.6 percent of all county arrests.



Sources: California Department of Justice, Criminal Justice Statistics Center; California Department of Finance

MOST ORANGE COUNTY COMMUNITIES' CRIME LEVEL IS BELOW THE NATIONAL AVERAGE

Orange County Crime Index by Zip Code, 2019



Source: Esri, 2019 Crime Index

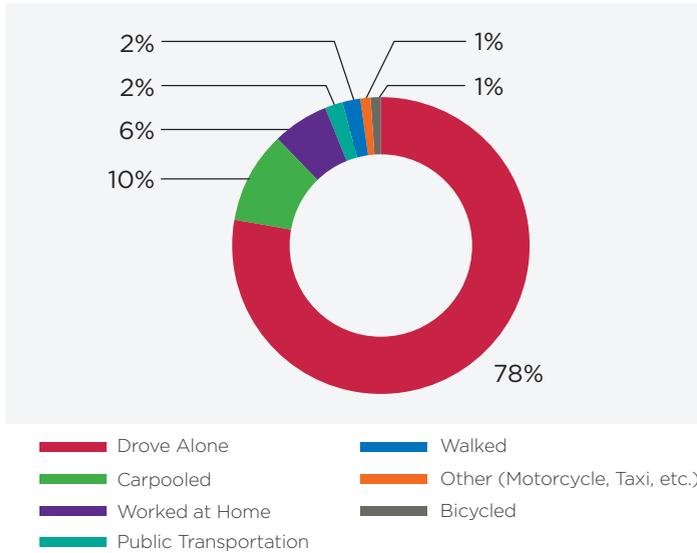


TRANSPORTATION

In 2017, 78 percent of Orange County residents age 16 and over drove to work alone, the same as the year before; this figure has not changed significantly in more than a decade. Carpooling rates held steady from the previous year at 10 percent, as did the percentage of those working at home (6 percent). All other means of commuting, including public transportation, make up approximately 6 percent of all commuters.

MOST COMMUTERS DRIVE ALONE

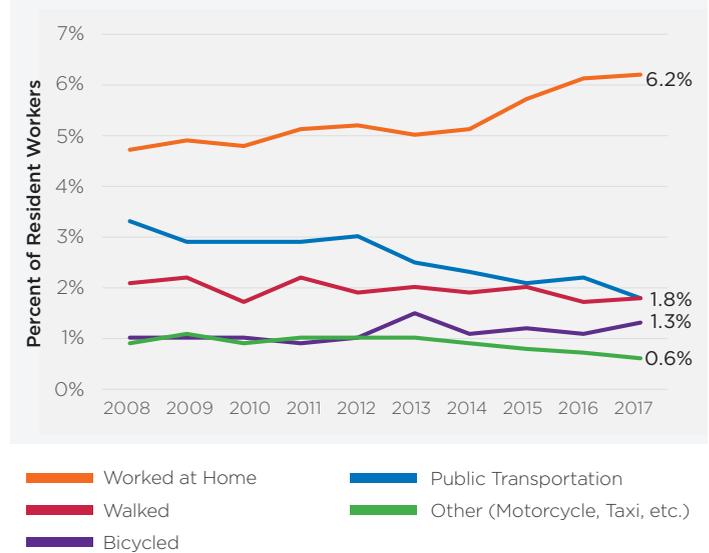
Mode of Travel to Work in Orange County, 2017



Source: U.S. Census Bureau, 2017 American Community Survey, 1-Year Estimates

MORE RESIDENTS WORK FROM HOME

Selected Modes of Travel to Work in Orange County, 2008-2017

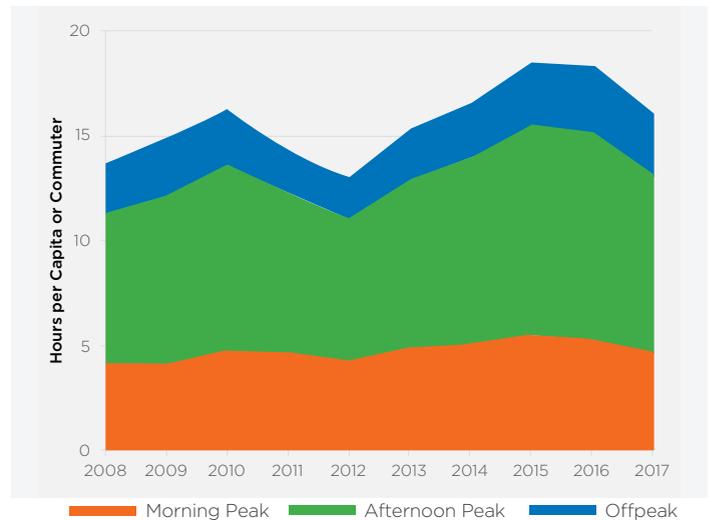


Source: U.S. Census Bureau, 2017 American Community Survey, 1-Year Estimates

Orange County freeways have experienced a reduction in congestion in recent years, most notably between 2016 and 2017. The average Orange County traveler spent 16.0 hours in freeway traffic congestion in 2017, mostly during the afternoon and evening peak hours of travel, compared with 18.3 hours in 2015; this 12 percent drop brought the county back to 2014 levels of congestion. In 2017, Orange County posted less traffic delay than the peers compared, except for the Inland Empire. Similar to reduced congestion in unmanaged lanes, the flow of traffic in Orange County's carpool lanes has improved since hitting a peak in 2015. According to Caltrans, 77 percent of Orange County's carpool lanes were congested in 2017, down from 81 percent in 2015. After remaining relatively flat through the Great Recession, car ownership in Orange County began to rise in 2012, growing 15 percent between 2012 and 2016, but has since leveled off. County car ownership grew by only one percent between 2016 and 2018.

FREEWAY DELAY DECLINING IN RECENT YEARS

Annual Hours of Freeway Delay per Capita or Commuter in Orange County, 2008-2017

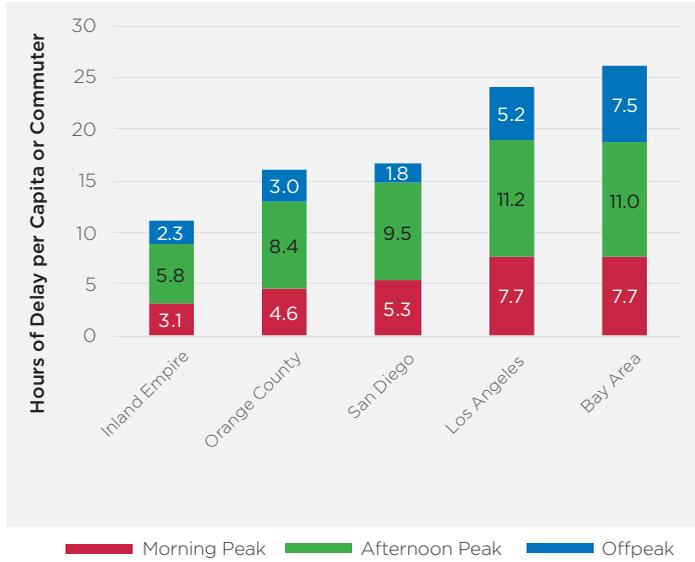


Note: Data for peak hours reflect annual hours of delay per commuter at speeds less than 60 miles per hour on freeways in Orange County. Data for offpeak hours are per capita.

Source: Caltrans, Performance Measurement System; U.S. Census Bureau, American Community Survey, 1-Year Estimates; California Department of Finance, Population Estimates, Table E-2

ORANGE COUNTY HAS LESS CONGESTION THAN SAN DIEGO, L.A., AND THE BAY AREA

Regional Comparison of Annual Hours of Freeway Delay per Capita or Commuter, 2017

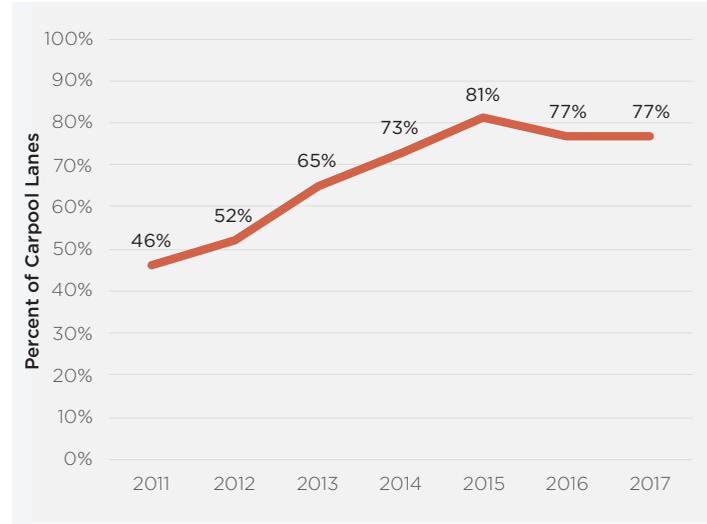


Note: Data for peak hours reflect annual hours of delay per commuter at speeds less than 60 miles per hour on freeways in Orange County. Data for offpeak hours are per capita.

Source: Caltrans, Performance Measurement System; U.S. Census Bureau, American Community Survey, 1-Year Estimates; California Department of Finance, Population Estimates, Table E-2

CARPOOL LANE CONGESTION IMPROVES

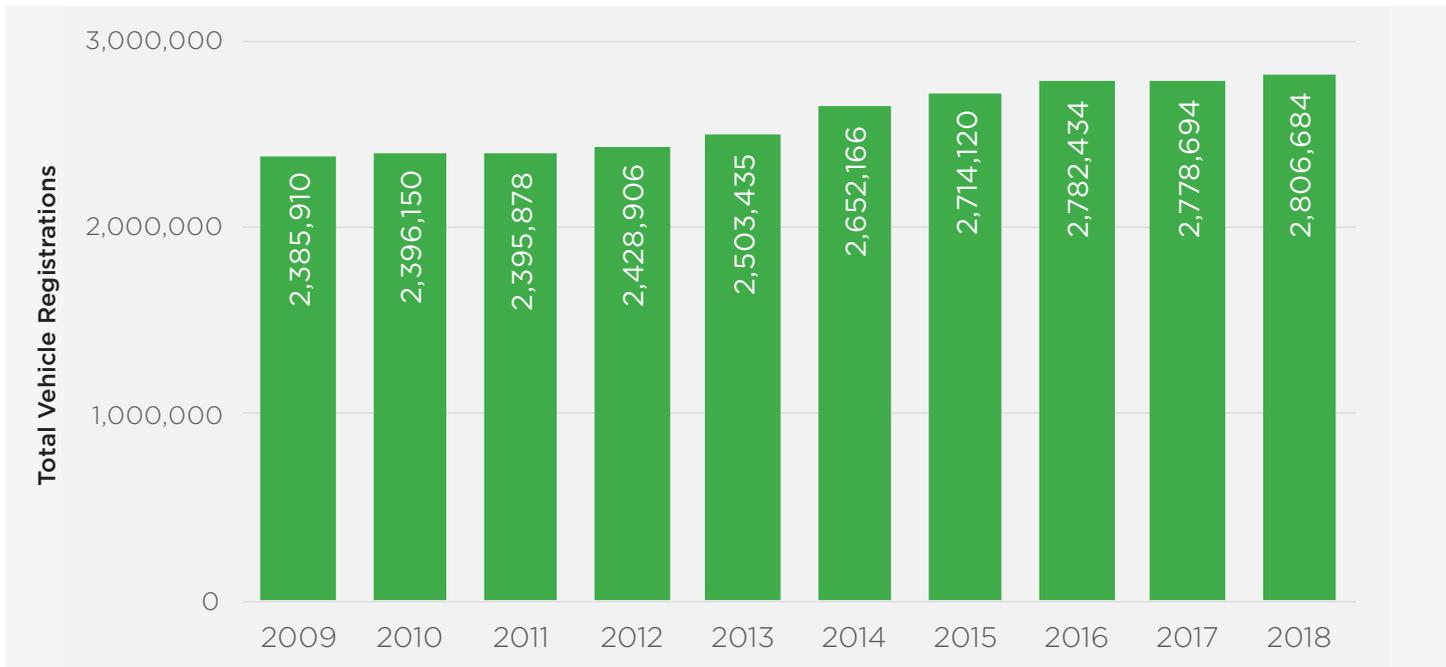
Percentage of Carpool Lanes that are Congested in Orange County, 2011- 2017



Source: Caltrans, 2011 through 2017 California High-Occupancy Vehicle Lane Degradation Determination Reports

CAR OWNERSHIP BEGINNING TO LEVEL

Vehicle Registration in Orange County, 2009-2018



Source: California Department of Motor Vehicles, Forecasting Unit



INFRASTRUCTURE

Most working residents live and work within Orange County (a total of 921,445 people in 2015). A substantial number of people, however, live in neighboring counties and commute to work in Orange County. A smaller number of people live in Orange County but work outside the county. In 2015, a net of about 167,000 non-resident commuters traveled to Orange County to work.

The largest volume of traffic flow is between Orange County and Los Angeles County, with about 14,000 more commuters coming into Orange County than going into Los Angeles. While the volume of traffic flow is smaller, the differences between inflow and outflow are more pronounced between Orange County and the Inland Empire, as well as San Diego County. In each case, there are more commuters coming into Orange County than flowing into other counties.

MORE PEOPLE COMMUTE IN THAN OUT

Intercounty Commuting Patterns Between Orange and Neighboring Counties, 2015



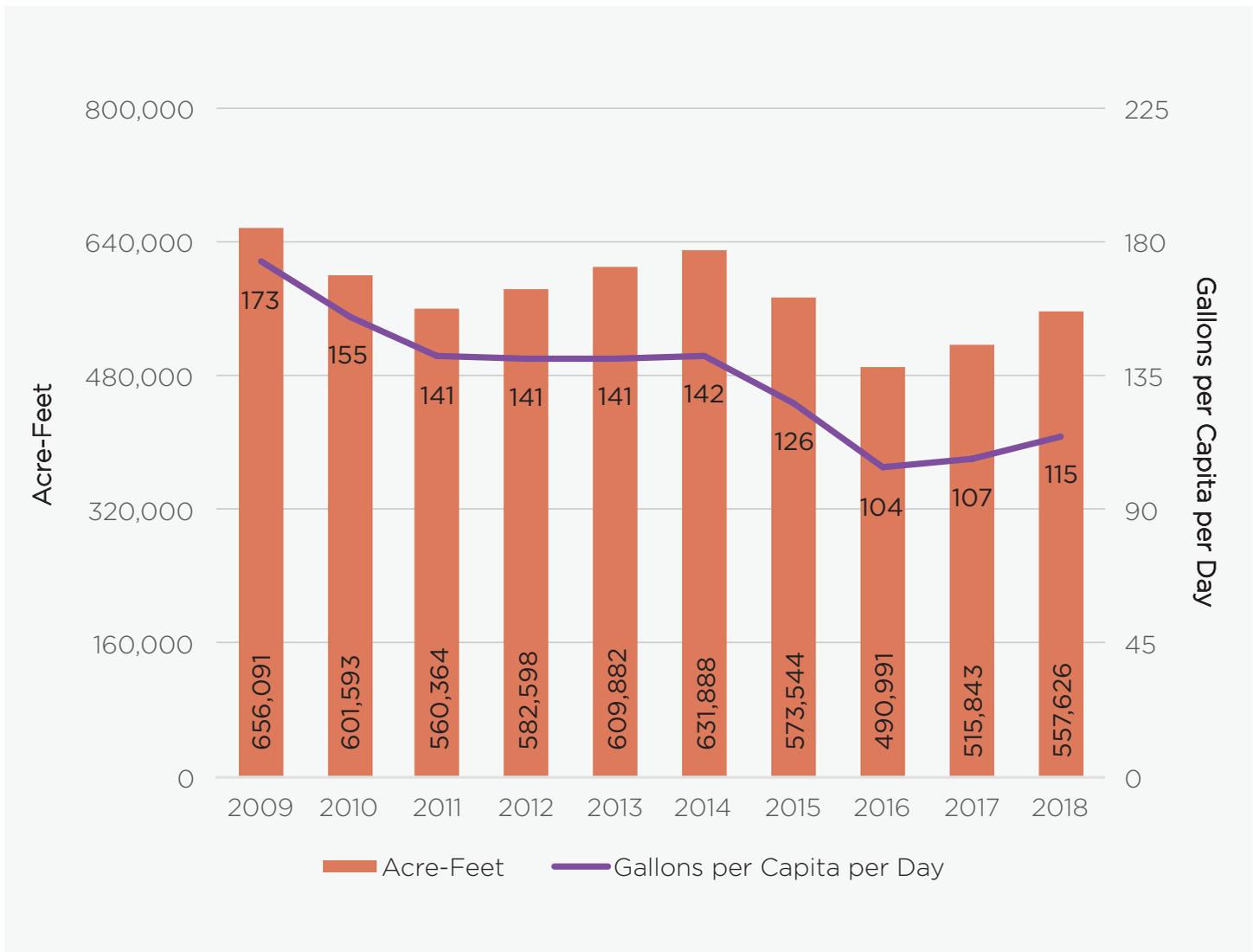
Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

WATER USE AND SUPPLY

Orange County’s urban water usage has increased since the statewide mandatory water restrictions were lifted in April 2017. Countywide potable water consumption averaged 115 gallons per capita per day (GPCD) in 2018, up from 107 the year before and the 10-year low of 104 in 2016; Orange County’s GPCD averages remain well below the county’s SB X7-7 target of 158 GPCD by 2020. Over the past 10 years, per capita potable water consumption in Orange County has fallen 15 percent.

AS DROUGHT FEARS LIFT, WATER USAGE INCREASES

Urban Water Usage in Acre-Feet and Gallons per Capita Per Day in Orange County, 2009-2018



Source: Municipal Water District of Orange County

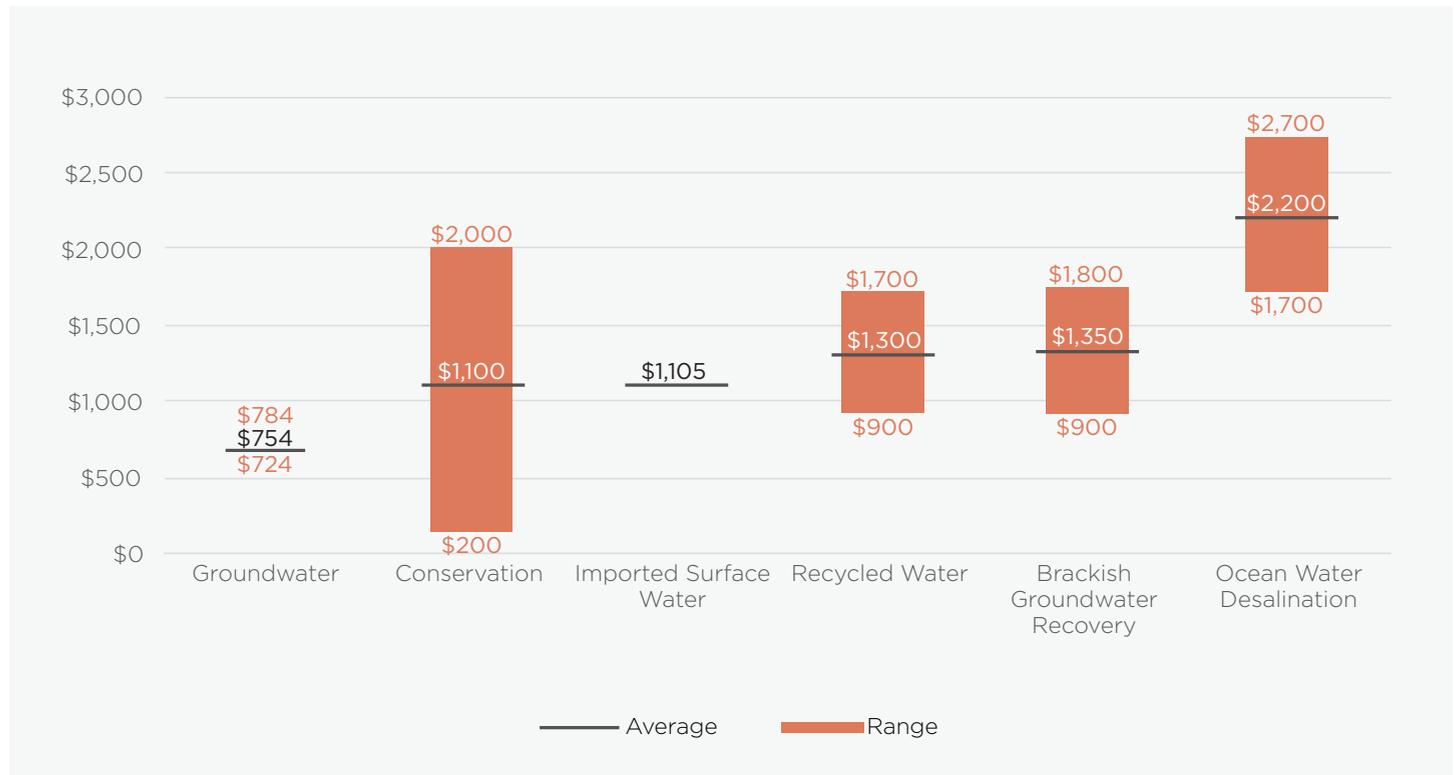


INFRASTRUCTURE

The cost of water varies by source. On average, ocean water desalination and brackish groundwater recovery are the costliest sources, while groundwater and conservation are the least costly sources. The cost of groundwater has increased 79 percent over the past 10 years while the cost of imported surface water for direct use has increased 36 percent. Orange County’s water supply does not currently include desalinated ocean water.

GROUNDWATER AND CONSERVATION ARE THE LEAST COSTLY SOURCES OF WATER

High, Low, and Average Costs of Water by Source in Orange County, 2019

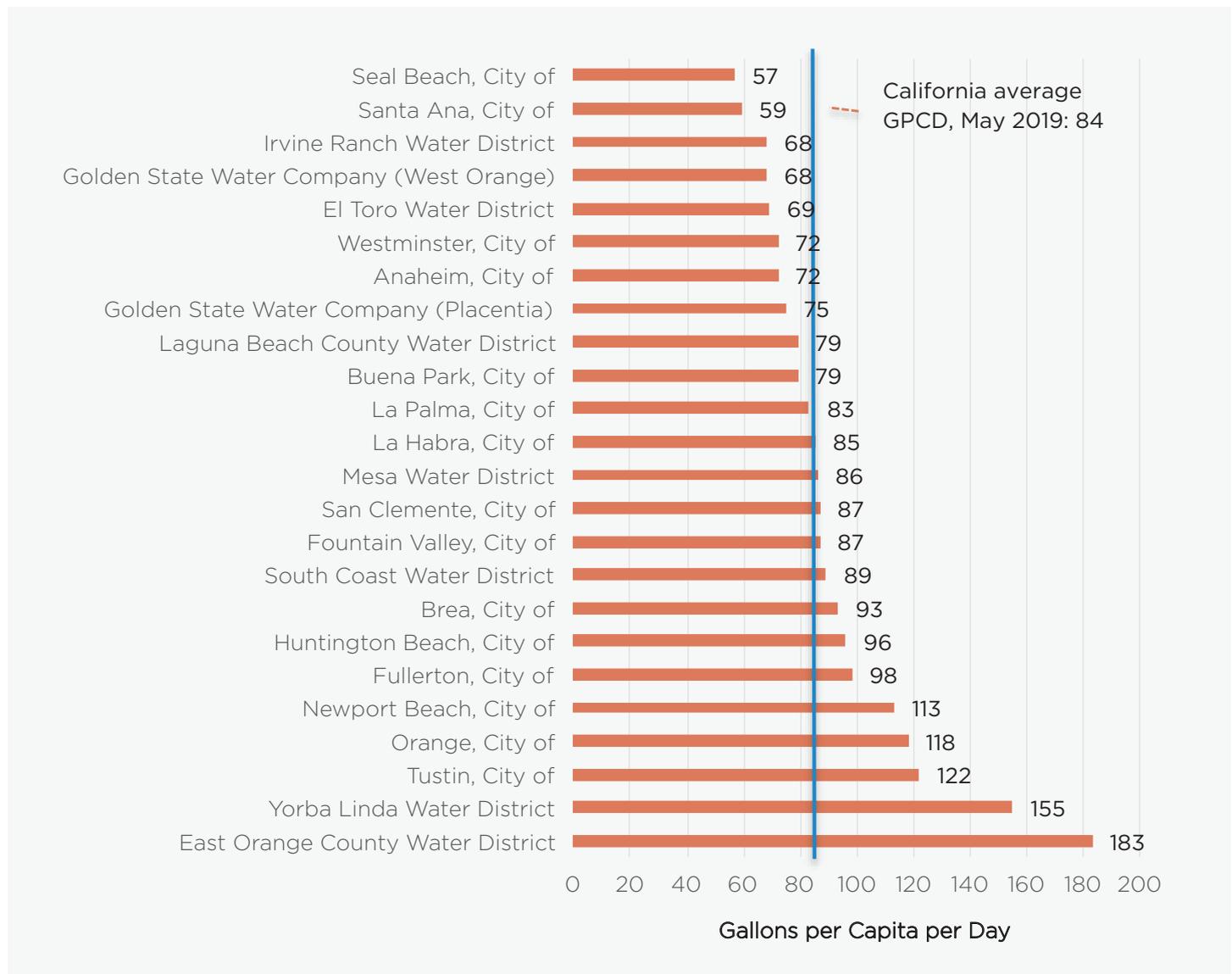


Sources: Municipal Water District of Orange County; Orange County Water District

According to residential water consumption data from May 2019, approximately one-third of Orange County water retailers (11) reported lower per capita water consumption than the statewide average of 84 gallons per capita per day (GPCD). The remaining 18 reported GPCD above the statewide average and five water retailers serving Orange County did not report usage for May 2019.

11 OUT OF 29 ORANGE COUNTY WATER RETAILERS HAVE LOWER PER CAPITA CONSUMPTION THAN THE STATEWIDE AVERAGE

Water Consumption in Gallons per Capita per Day by Orange County Water Retailer, May 2019



Source: State Water Resources Control Board



INFRASTRUCTURE



DROUGHT STATUS

The 2018/19 water year (October 1 to September 30) has been a good one in terms of snowpack, posting 144 percent of normal as of the year's last snow survey in May 2019. As of July 2019, remaining snowpack statewide is 71 percent of normal. Thirty percent of California's water supply comes from Sierra Nevada snow, while another third of California's water supply comes from groundwater. Precipitation, which helps recharge groundwater basins, is above average statewide in water year 2018/19 and, as of July 2019, most California reservoirs are above average capacity.

According to the U.S. Drought Monitor, as of June 2019, Orange County has "abnormally dry" drought status in all but the northern portion of the county, where there is currently no drought indicated. "Abnormally dry" is lowest level on the drought scale.

Given California's extreme swings from drought to flood and back to drought, state officials recommend that ongoing conservation and a long-term solution to the state's water needs are necessary.

Source: California Department of Water Resources; U.S. Drought Monitor, 6/27/2019; U.S. Geological Survey, Runoff Estimates for California

Data Notes

"Brackish groundwater recovery" is the process of treating pockets of slightly salty (brackish) groundwater and returning it to the overall water supply. Urban water usage data in acre-feet includes residential, industrial, and commercial water use in a fiscal year (July- June); data identified as 2018, for example, reflects water use in FY 2017/18. The gallons per capita per day (GPCD) calculations for Orange County overall, provided by the Municipal Water District of Orange County, are calculated to comply with SB X7-7, a 2009 water conservation law that sets an overall goal of reducing per capita urban water use by 20% by December 31, 2020. These GPCD calculations include potable water, less recycled water and indirect potable reuse water for the entire fiscal year. This measure of GPCD differs from GPCD reported in Community Indicators Reports prior to 2017. The GPCD figures by water supplier from the State Water Resource Control Board reflect residential water use only and report water usage for a single month. Reporting to the state is currently voluntary for water suppliers; the following water suppliers serving Orange County did not file water conservation reports for May 2019: City of Garden Grove, Moulton Niguel Water District, City of San Juan Capistrano, Santa Margarita Water District, and Trabuco Canyon Water District. For 2040 water supply projections by source, please see the 2018 Orange County Community Indicators Report at www.ocgov.com/about/infooc/facts/indicators.



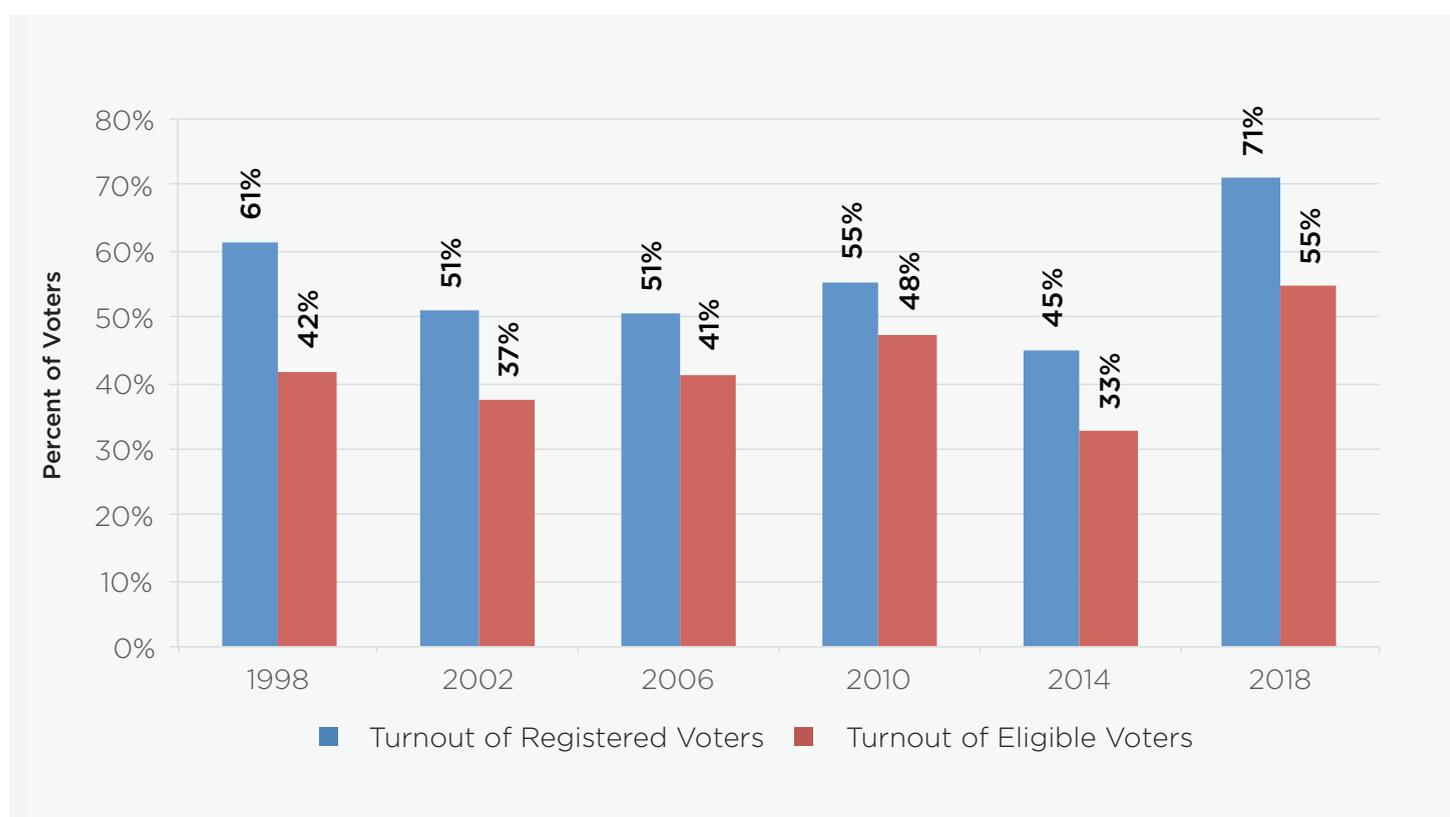
VOTER PARTICIPATION

In the 2018 midterm election, 71 percent of all registered voters turned out to vote. The 2018 midterm turnout rate among all people eligible to vote (registered or not) was 55 percent. Both of these turnout rates surpass not only turnout in the last midterm election in 2014, but they represent the highest voter participation rates in the past two decades. Similar increases in midterm election voter turnout were seen in counties across California, with turnout at the state level increasing from 31 percent in 2014 to 50 percent in 2018.



2018 MIDTERM ELECTION TURNOUT NEARLY DOUBLE 2014 MIDTERM TURNOUT

Orange County Midterm Election Turnout Among Registered Voters and Voting-Eligible Population, 1998-2018

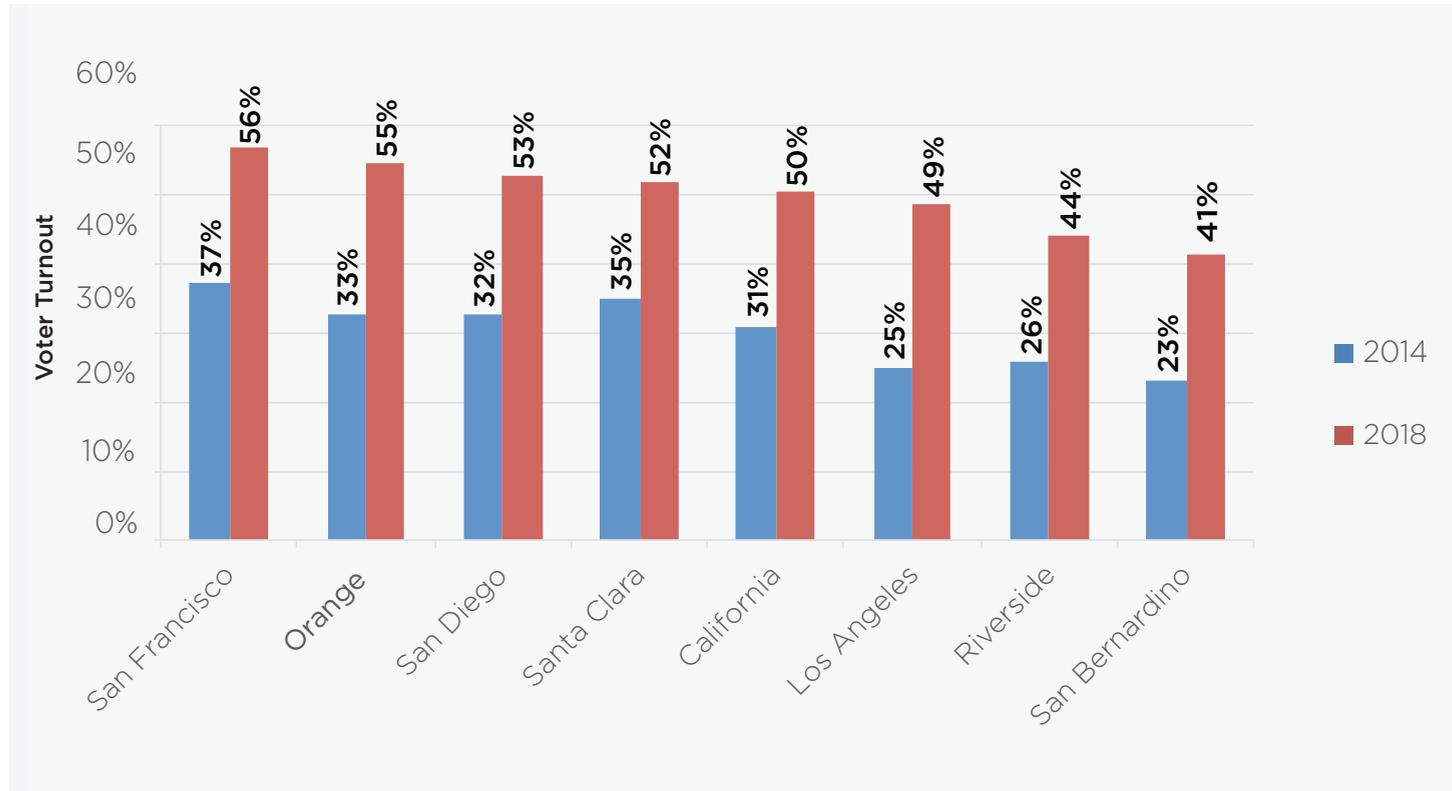


Source: California Registrar of Voters, California Secretary of State



DRAMATIC INCREASE STATEWIDE IN VOTING-ELIGIBLE POPULATION WHO VOTED IN 2018

County Comparison of Voter Turnout for Midterm Elections among Voting-Eligible Residents, 2014 and 2018



Source: California Registrar of Voters, California Secretary of State

IRVINE RANKS FIRST IN CITY FINANCES

For the 3rd year in a row, truth in Accounting's 2019 *Financial State of the Cities* report ranked Irvine first among the nation's 75 most populous cities, based on comprehensive annual financial reports for the 2017 fiscal year. With a financial grade of "B," Irvine had a net \$377 million surplus, which equates to a surplus of \$4,400 per taxpayer. In comparison, 63 of the 75 cities had taxpayer burdens or deficits, largely a result of unfunded pensions and debt from healthcare costs, underfunded pensions and other expenses.

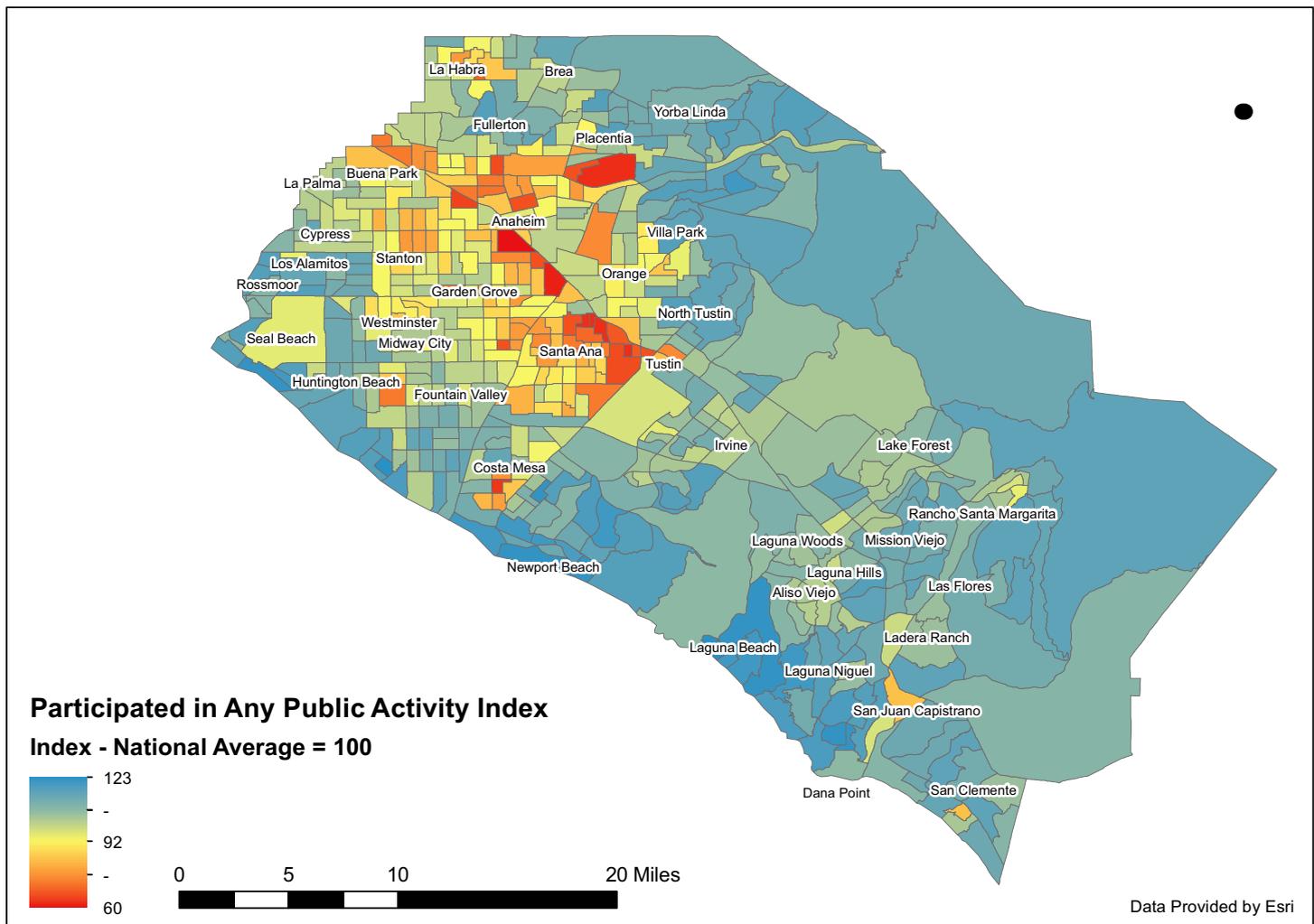


CIVIC ENGAGEMENT

Many Orange County residents engage in their communities through participation in public activities and meetings. In the last 12 months, Orange County residents were more likely to participate in public activities, including political and non-political community activities, than the national average. Those most likely to participate in any public activity were concentrated in southern and coastal portions of the county, while less active residents were more likely to live in central Orange County cities

MOST OC RESIDENTS MORE LIKELY TO PARTICIPATE IN PUBLIC ACTIVITIES THAN NATIONAL AVERAGE

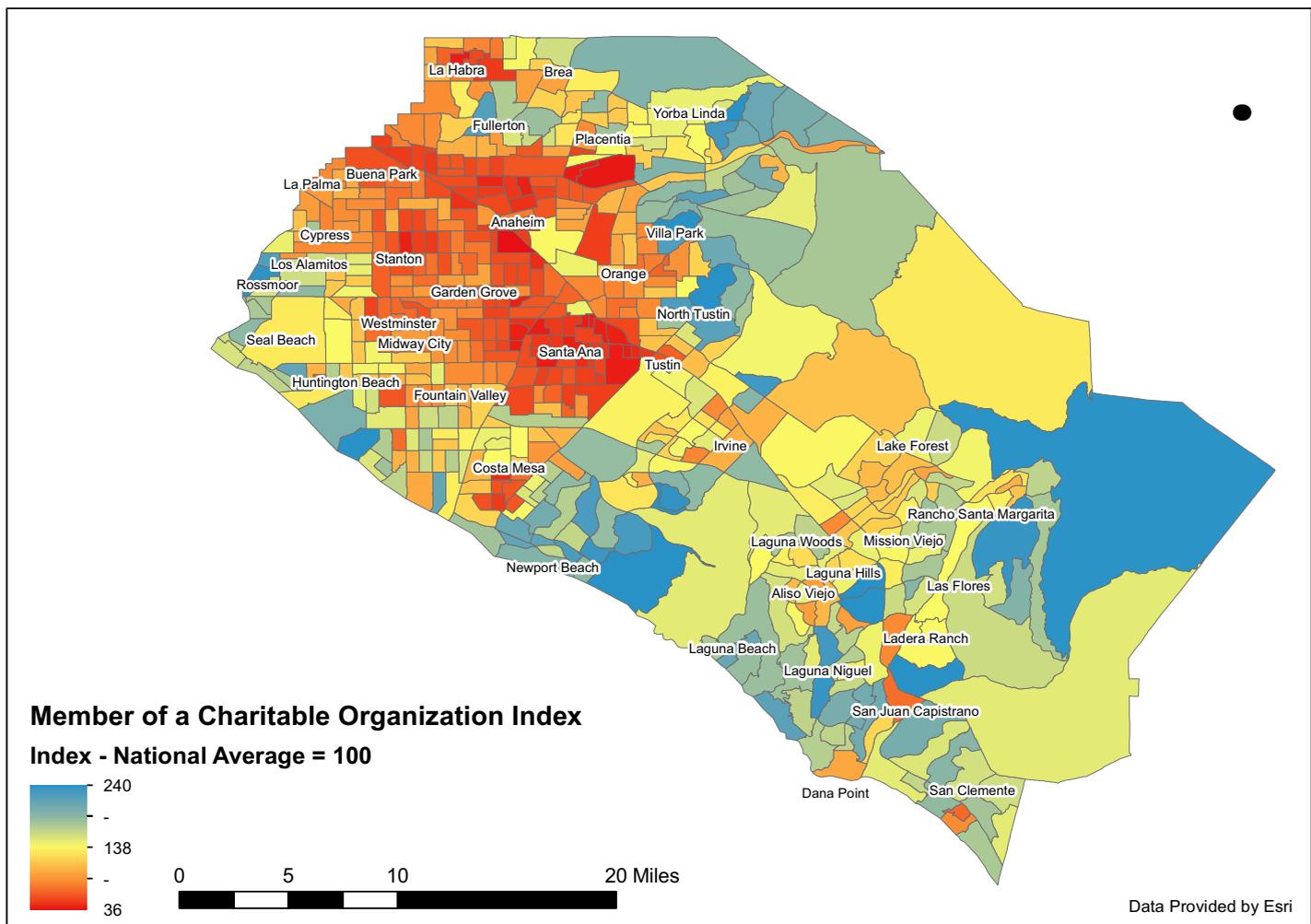
Index of Participation in Any Public Activity in the Last 12 Months in Orange County by Census Tract, 2019



Many Orange County residents are also significantly more involved in charitable activities than the national average. Membership in a charitable organization demonstrates the likelihood of individuals volunteering their time and attention to important causes which impact their lives. Membership is concentrated in coastal and southern parts of Orange County such as Newport Beach and Laguna Beach.

CHARITABLE ORGANIZATION MEMBERSHIP GREATER THAN NATIONAL AVERAGE IN MANY ORANGE COUNTY CITIES

Index of Member of a Charitable Organization in Orange County by Census Tract, 2019





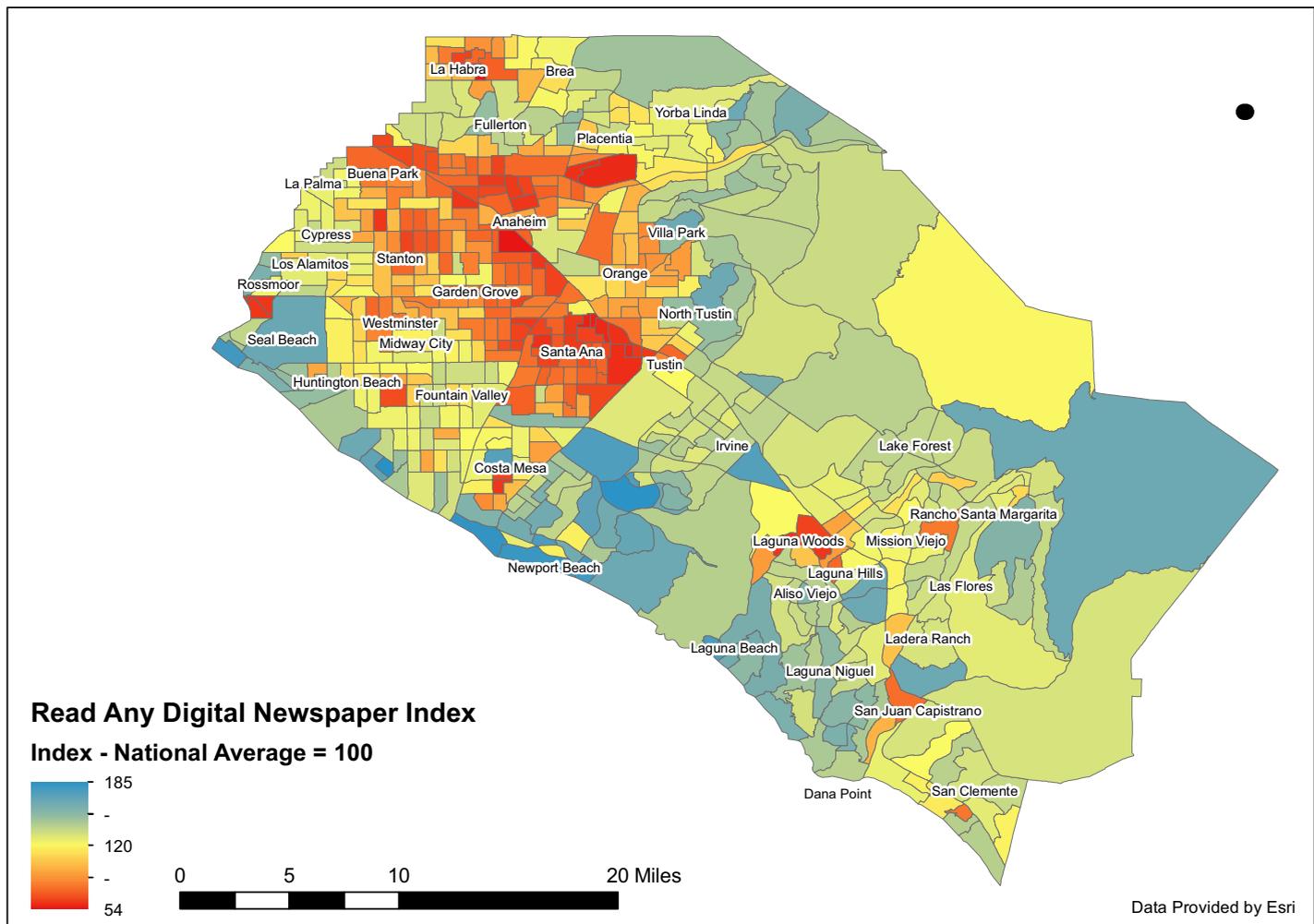
MEDIA AND INFORMATION

According to Pew Research, newspaper readership has experienced declines since 2007, when new technologies such as smart phones and social media began gaining in popularity.

Digital newspapers are much more popular in Orange County than physical newspapers, especially near universities and in the business hub of Irvine. Low levels of paper newspaper reading are concentrated near colleges and universities as well as in less affluent cities, while higher levels of paper newspaper reading are seen in older, more affluent communities such as Villa Park, Newport Beach and Laguna Niguel. North-central Orange County has low levels of both digital and paper readership.

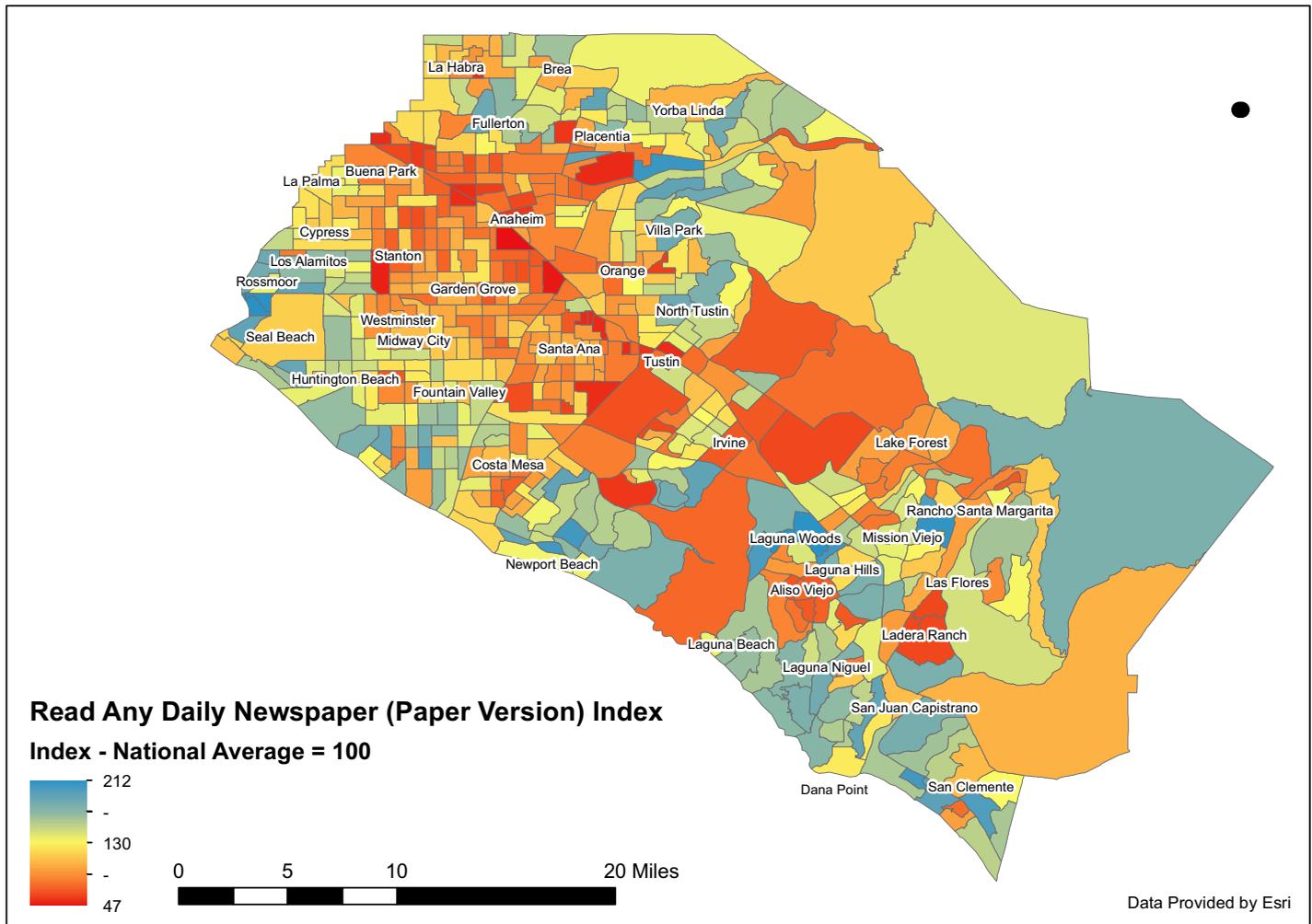
DIGITAL NEWSPAPERS REPLACING PAPER

Index of Read Any Digital Newspaper in the Last 30 Days in Orange County by Census Tract, 2019



More Paper Newspaper Readers in Coastal Communities

Index of Read Any Daily Newspaper (Paper Version) in Orange County by Census Tract, 2019



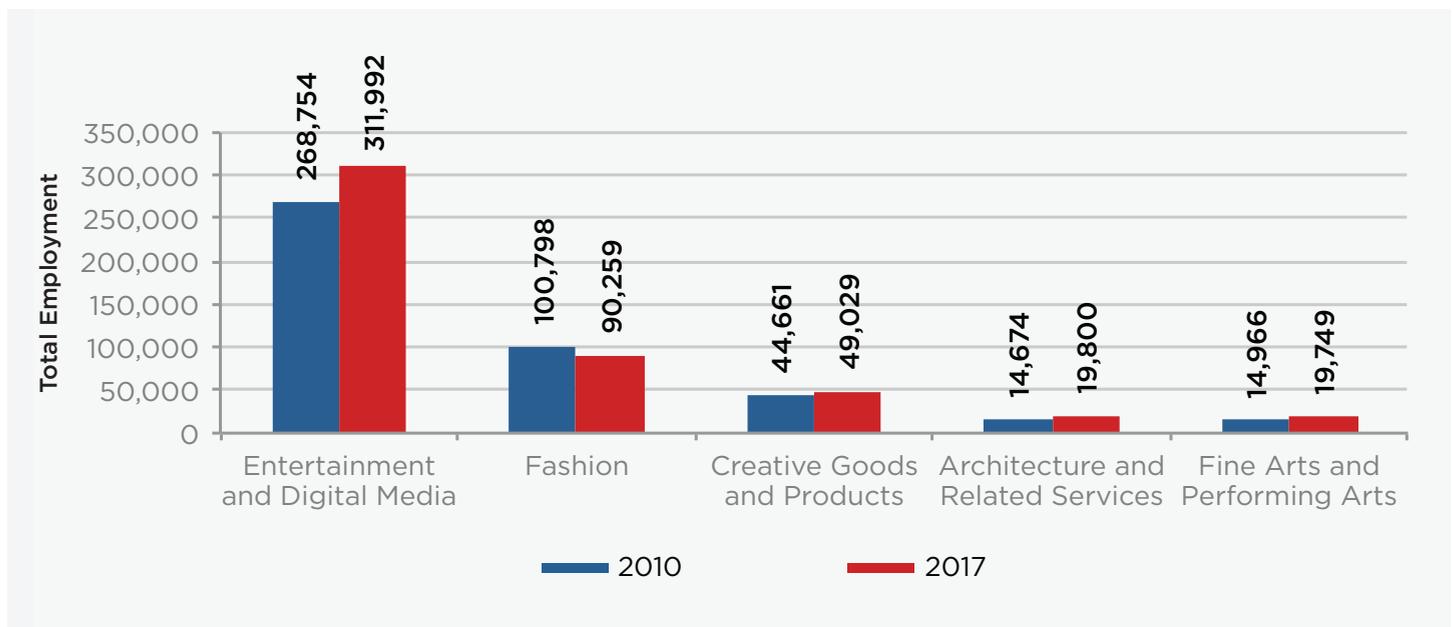


CREATIVE ECONOMY

In 2017, Southern California’s creative sector employed approximately 490,830 workers across Los Angeles and Orange counties. The creative sector includes five industries: Entertainment and Digital Media; Fashion; Creative Goods and Products; Fine Arts and Performing Arts; and Architecture and Related Services. Since 2010, the creative sector in Southern California grew 10.6 percent, adding about 47,000 employees. The largest market segment in the creative subsector, Entertainment and Digital Media, has accounted for the majority of employment growth since 2010, adding 43,238 jobs. The second largest market segment, Fashion, was the only industry to experience a decline in employment, losing 10,539 jobs.

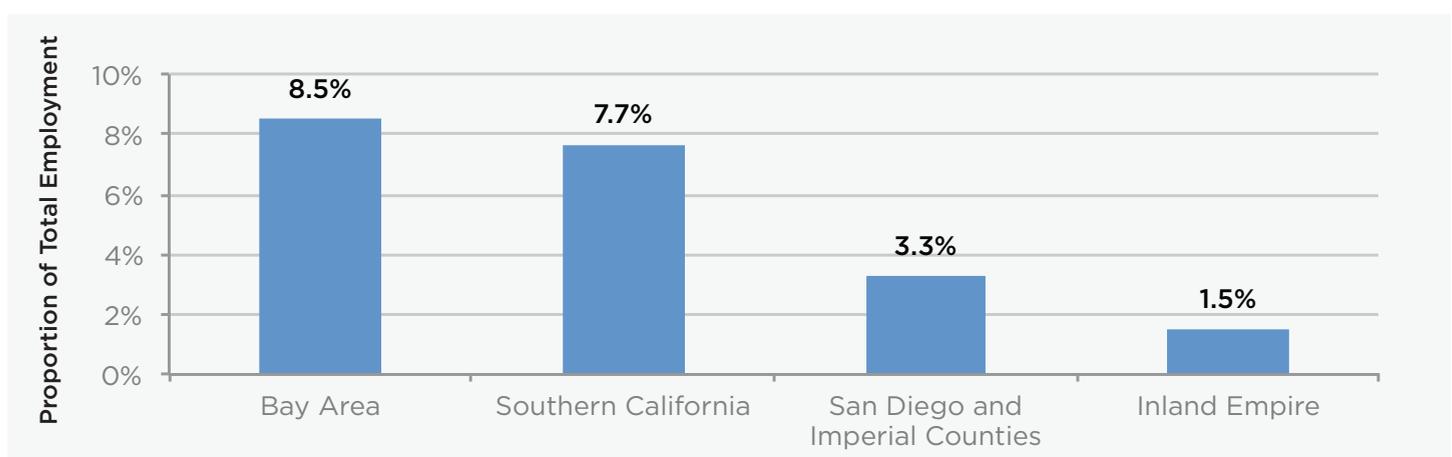
ALL CREATIVE INDUSTRIES EXPERIENCE GROWTH EXCEPT FASHION

Total Employment by Creative Sector in Southern California, 2010-2017



Source: 2019 Otis Report on the Creative Economy

Proportion of Creative Sector Employment by California Region, 2017



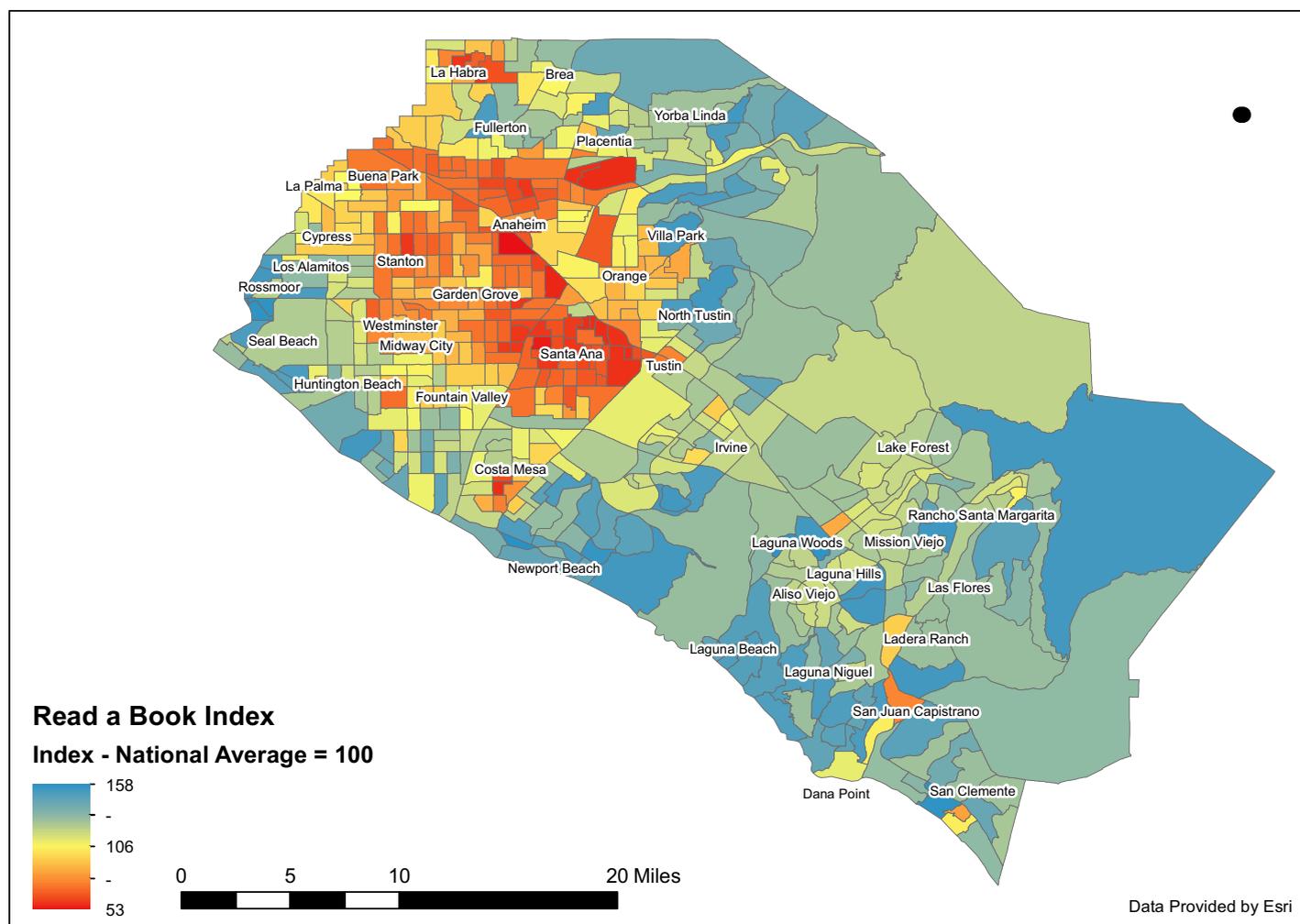
Source: 2019 Otis Report on the Creative Economy

CULTURAL ENGAGEMENT

A variety of measures of involvement in arts and culture activities – painting or drawing, playing musical instruments, reading books, visiting a museum, attending live theatre, and visiting an art gallery – display a common theme: generally higher than average involvement in more affluent areas of the county and less than average involvement in lower income areas. Compared to the national averages, Orange County residents enjoy painting or drawing, playing musical instruments, reading books, and visiting museums at higher rates.

READING REMAINS A PRIORITY FOR MANY ORANGE COUNTY RESIDENTS

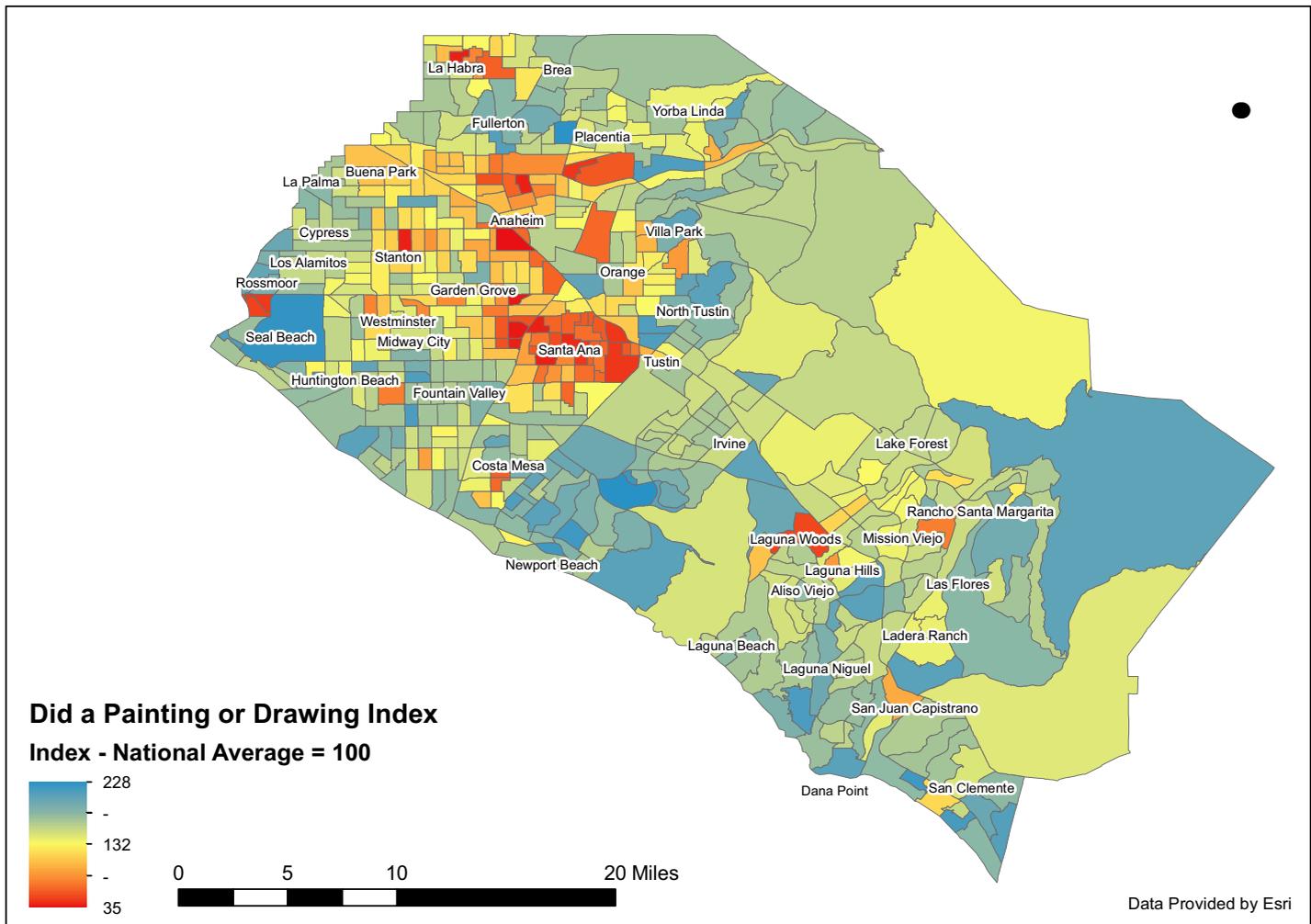
Index of Read a Book in the Last 12 Months in Orange County by Census Tract, 2019



Laguna Beach, with an artistic history stretching back more than a century, continues to have some of the county's highest rates of participation in visual arts-related activities such as painting, drawing, or visiting a museum.

ARTISTS ARE SCATTERED THROUGHOUT ORANGE COUNTY

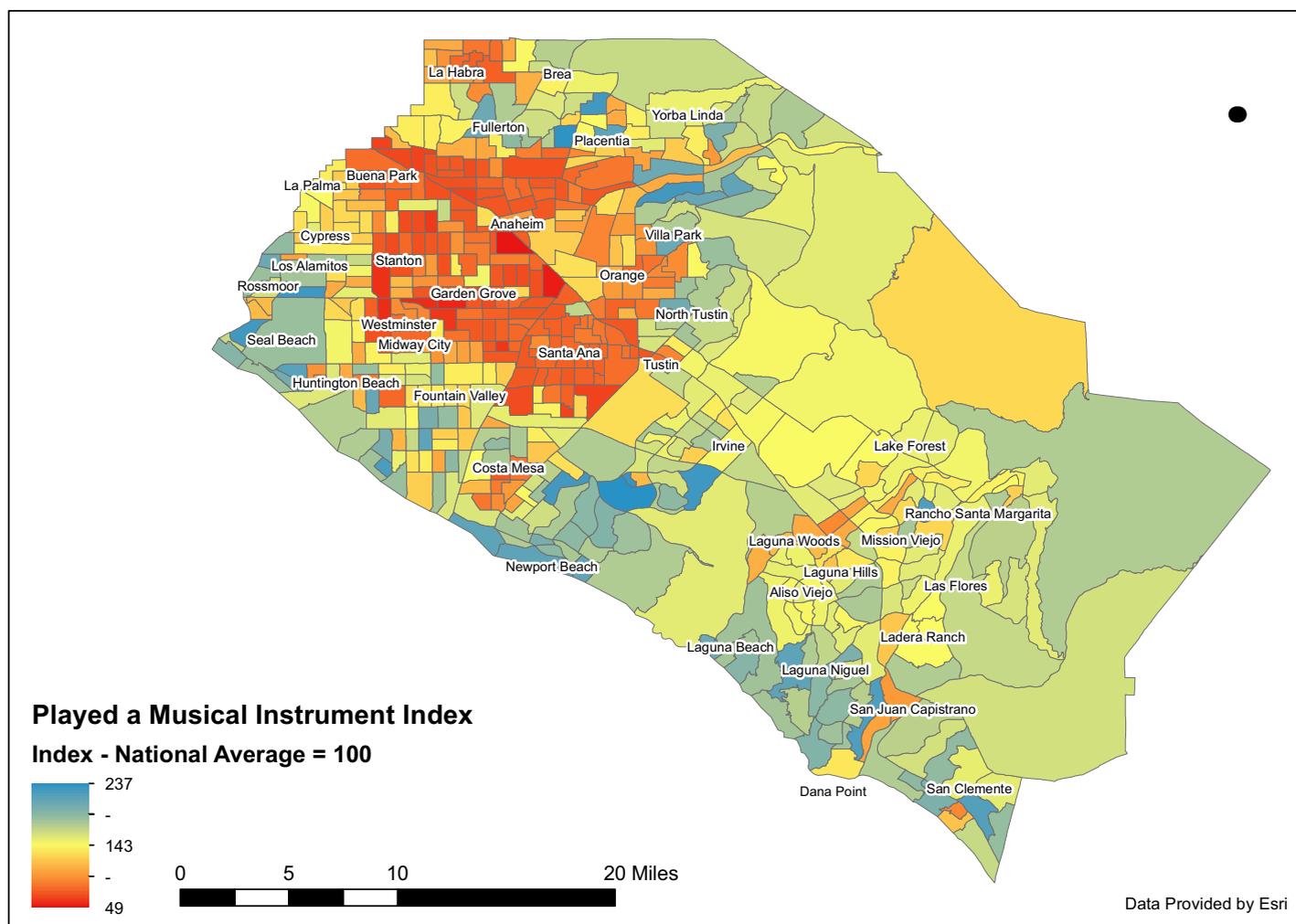
Index of Did a Painting or Drawing in the Last 12 Months in Orange County by Census Tract, 2019



Painting and drawing is an extremely popular activity across the region, while playing musical instruments is primarily focused in more coastal communities. Reading books, also fairly prevalent across the area, is concentrated in coastal communities and in northern portions of the region such as Yorba Linda, Villa Park and North Tustin.

MANY ORANGE COUNTY RESIDENTS ARE MORE MUSICALLY INCLINED THAN THE NATIONAL AVERAGE

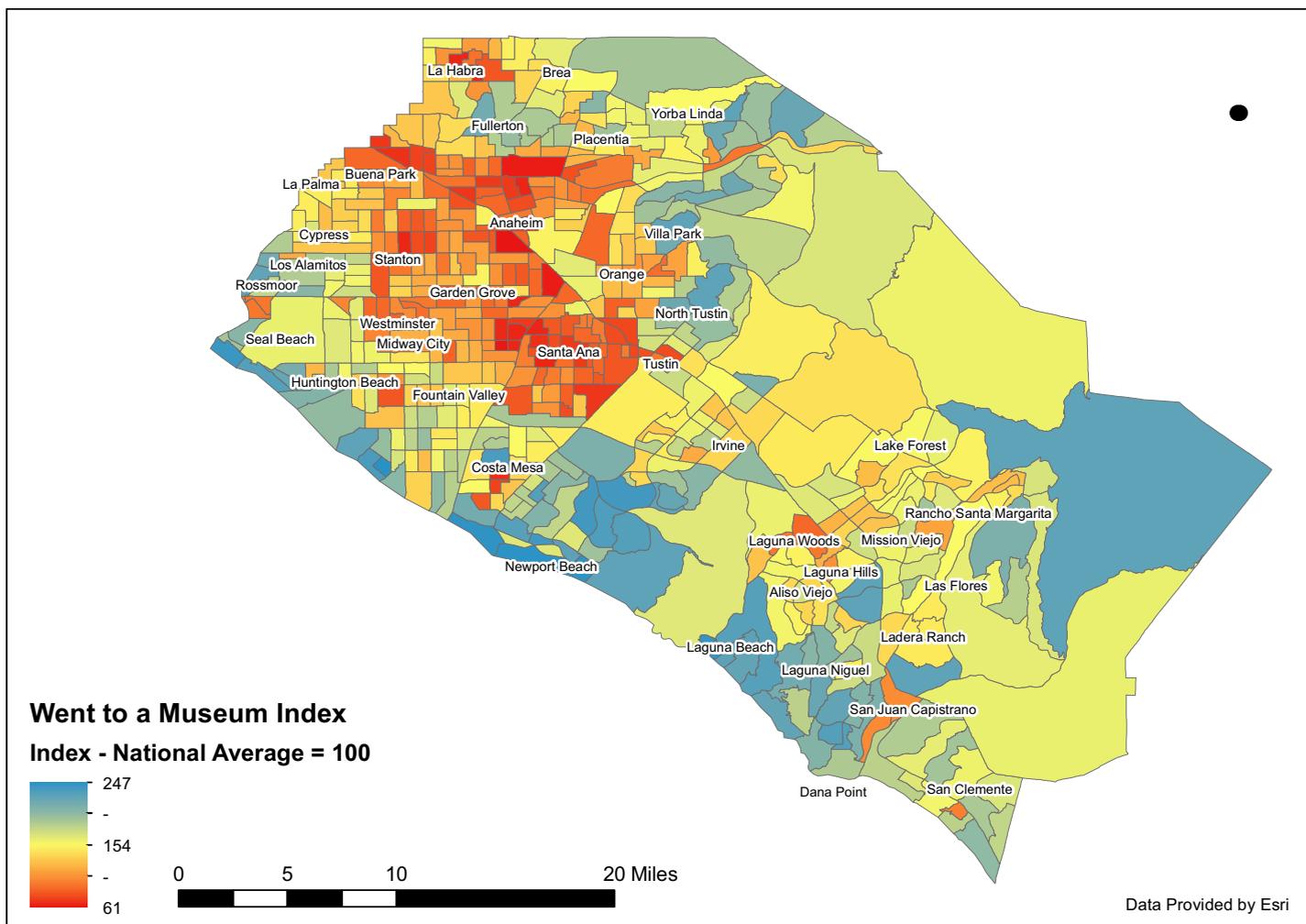
Index of Played a Musical Instrument in the Last 12 Months in Orange County by Census Tract, 2019



Visiting museums showed higher rates of popularity in coastal regions and lower rates in more central portions of the county. Museum visits were higher than national averages, boosted by amenities such as the presence of the Discovery Cube Orange County, Bowers Museum and the Orange County Museum of Art.

MUSEUM ATTENDANCE AMONG MANY ORANGE COUNTY RESIDENTS REMAINS HIGH

Index of Went to a Museum in the Last 12 Months in Orange County by Census Tract, 2019



DOING MORE™ BECAUSE...

A better education can lead to a better life.



A full stomach and healthy food are essential for optimal living.



A community where everyone is financially stable helps all of us.



Everyone should have a place to call home.

Last year we served 765,556 people in Orange County, delivering 50+ programs in education, health, housing and financial stability. But we didn't do it alone.

Caring individuals like you joined with us.

This year, we need your help to Do More.

Learn more at UnitedWayOC.org





LISA BARTLETT

CHAIRWOMAN, ORANGE COUNTY BOARD OF SUPERVISORS
SUPERVISOR, FIFTH DISTRICT

ORANGE COUNTY HALL OF ADMINISTRATION
333 W. SANTA ANA BLVD., P.O. BOX 687, SANTA ANA, CALIFORNIA 92702-0687
PHONE: (714) 834-3550 FAX (714) 834-2670

September 19, 2019

Dear Friends,

On behalf of the Orange County Board of Supervisors, I am pleased to announce the release of the *2019-20 Orange County Community Indicators* report and welcome you to the 2019 Community Indicators Summit. The Orange County Community Indicators Report celebrates its 20th year of publication this year, developed through a long-standing partnership between First 5 Orange County and regional organizations to bring attention to issues that we all need to work together on to address.

The *2019-20 Orange County Community Indicators* report presents a comprehensive analysis of Orange County's health and prosperity, including indicators that track where the county is performing and making progress, as well as challenges facing this dynamic region. This report provides invaluable tools and data for business, government, and community leaders to shape future policies, services and investments in the region. This examination of regional trends – including cost of living and household income, health care access and overall wellbeing, governance and civic engagement, economic indicators, and more – provides data and information about the Orange County region that will inform choices made, and priorities set, by today's education, workforce, and business community leaders that may determine the fate of the county for decades to come.

The County of Orange is proud to support First 5 Orange County's ongoing efforts to strengthen and grow our region's economy. Congratulations to First 5 Orange County, Orange County United Way, CalOptima, Orange County Business Council, and Orange County Community Foundation on the *2019-20 Orange County Community Indicators* report.

Sincerely,

A handwritten signature in black ink that reads "Lisa A. Bartlett".

Lisa A. Bartlett Chairwoman,
Board of Supervisors
Orange County Supervisor, 5th District

TOGETHER, WE HAVE THE POWER TO KEEP THE FUTURE BRIGHT

We are proud to sponsor the Orange County Business Council **2019 Community Indicators Summit**





WE AGREE.

A strong economy is good for everyone's business. So at Chevron, we help to support the economy where we operate. We purchase goods and services locally. And we're committed to supporting the businesses around us. We're making investments where we work that will benefit the whole community – including us.

Learn more at chevron.com



Human Energy®

CHEVRON, the CHEVRON Hallmark and HUMAN ENERGY are registered trademarks of Chevron Intellectual Property LLC. © 2015 Chevron U.S.A. Inc. All rights reserved.



Our Communities.

Did you know that Orange County has more people than twenty-one U.S. states? Dynamically diverse, we are a blend of cultures and communities. We ought to know — we live and work here. And we'll keep bringing you stories about OC and the people who make it special.

THE ORANGE COUNTY
REGISTER
Nobody Beats Our Coverage
ocregister.com/subscribe

FivePoint is a
proud sponsor of the

*2019
Orange County
Community
Indicators
Summit*

We are honored to join thought-leading institutions in identifying challenges and implementing solutions for housing, education and other issues facing this dynamic place we call home.

At FivePoint, our purpose is to create communities where people want to live, work, play, learn and **connect**.

FIVEPOINT™





City of Hope is ranked the best cancer hospital
in California by U.S. News & World Report
and, most important, by cancer survivor Nicole Schulz.

© 2019 City of Hope

We're honored by the recognition from U.S. News, but we don't let it make us complacent. Instead, we use it as inspiration.

Because our patients' health is what propels us forward. Their well-being is at the forefront of every decision we make. For us, remission is our only rest point. A full cure, the only goal.

We're dedicated to delivering the best clinical care to our communities through relentless research, innovative treatments and unparalleled compassion for every City of Hope patient.

At City of Hope, we'll continue to put cancer patients, like Nicole, first. That's the only ranking that matters.

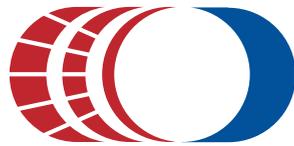
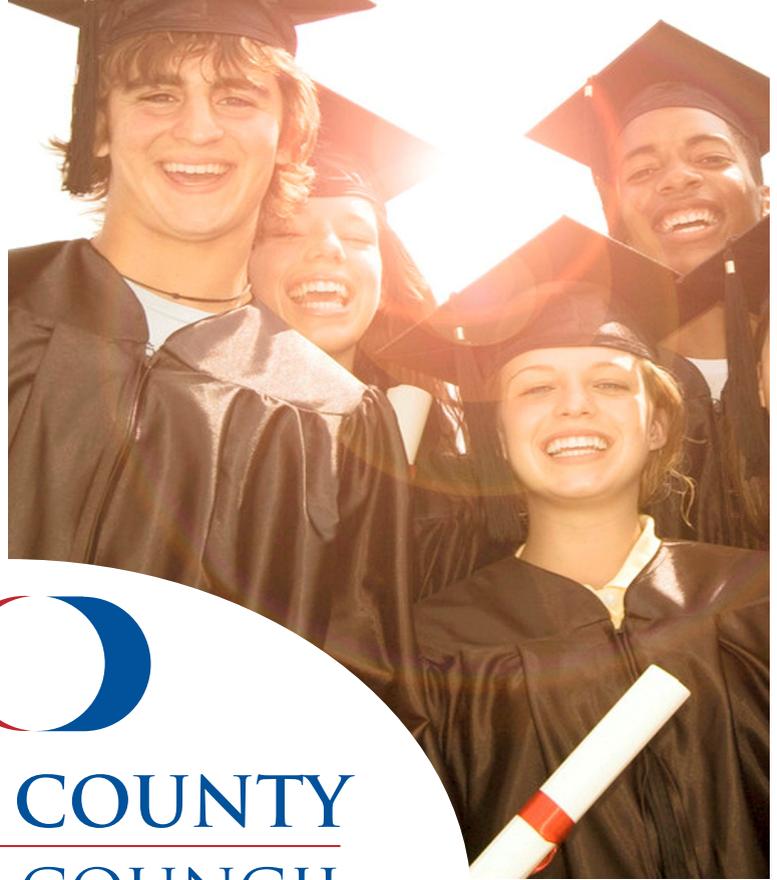
Discover more at CityofHope.org



ECONOMIC DEVELOPMENT



WORKFORCE DEVELOPMENT



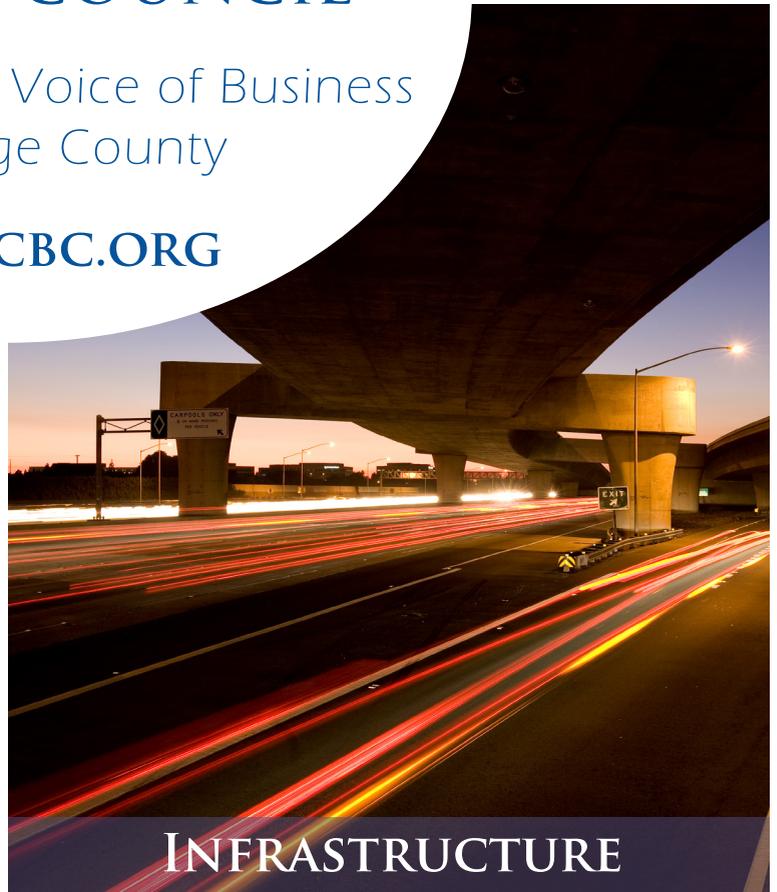
**ORANGE COUNTY
BUSINESS COUNCIL**

Join the Leading Voice of Business
in Orange County

WWW.OCBC.ORG



WORKFORCE HOUSING



INFRASTRUCTURE

2019-20 ORANGE COUNTY
**COMMUNITY
INDICATORS**

