2024
2025

ORANGE COUNTY
COMMUNITY
INDICATORS

25TH ANNIVERSARY REPORT

ORANGE COUNTY
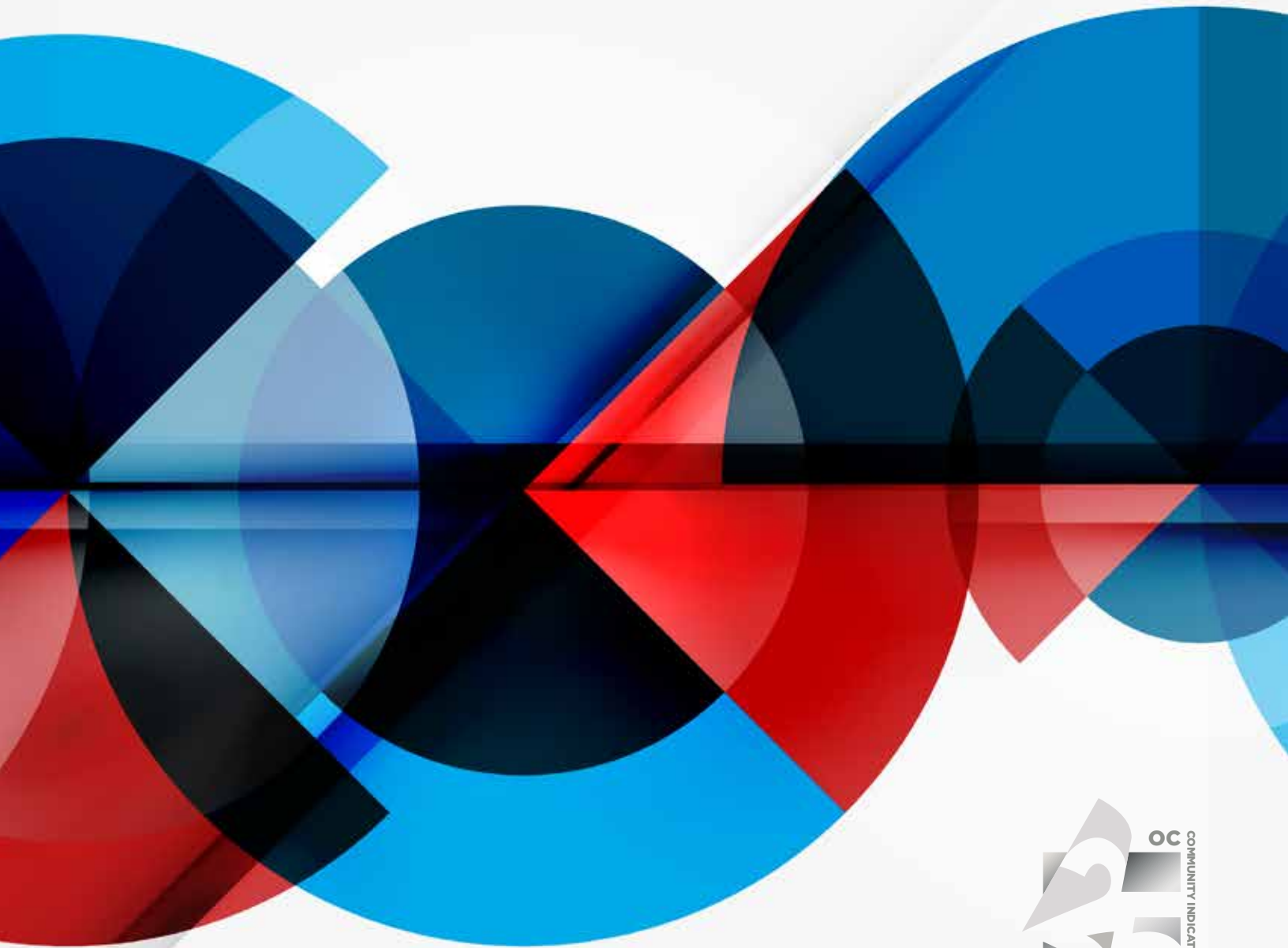BUSINESS COUNCIL

CalOptima Health

United Way
Orange County United Way

FIRST 5
ORANGE COUNTY

Orange County
Community
Foundation

OC
25
years

COMMUNITY INDICATORS REPORT

TABLE OF CONTENTS

Cover of the first Orange County
Indicators Report in 1999.
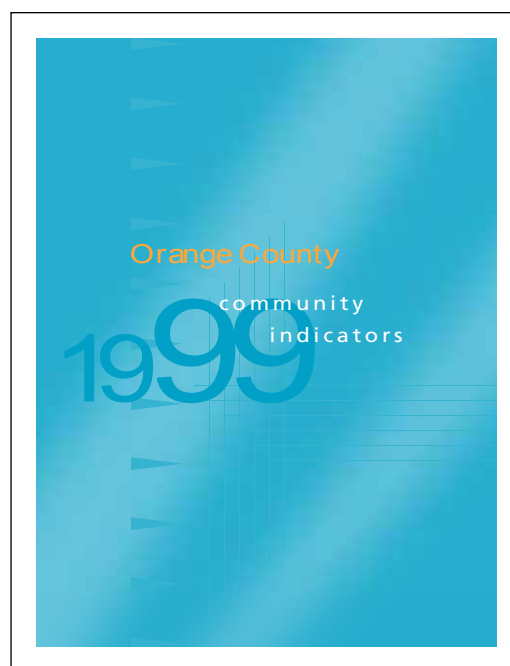
DEAR COMMUNITY PARTNER,

Welcome to the 25th anniversary of the *Orange County Community Indicators* report!

Orange County Business Council, in collaboration with CalOptima Health, First 5 Orange County, Orange County Community Foundation, and Orange County United Way, is pleased to present the *2024–25 Orange County Community Indicators* report.

Through the years, the report has become a reliable source for the economic, governmental, social, and environmental underpinnings of the nation's sixth most populous county—Orange County, California. Its comprehensive content has become a resource for business, government, nonprofits, and community leaders to help shape public policy.

An informed indicator reveals a region's performance, showing whether key areas are improving, declining, or maintaining. The indicators in this report track a comprehensive range of issues important to the stability of the region. The report highlights areas where the county is performing well and making progress, as well as areas where improvement is needed. We also compare Orange County to "peer" counties in California and across the nation based on shared characteristics.

This year's special section takes a look back at the last 25 years of our county's progress through a variety of changes and challenges: Y2K, the aftermath of 9/11, the Great Recession, the rise of e-commerce, the COVID-19 pandemic, supply chain issues, the skills gap, and a long-term housing shortage. While the county has experienced tremendous economic growth since 1999, it also faces some of the same challenges that it did in that year; fortunately, it also retains some of the key strengths that were already fueling prosperity and growth before the turn of the millennium.

It is our earnest desire that the insights of this report help shape informed responses and highlight areas where Orange County can best focus its resources and efforts.

As always, the findings in the report are intended to serve as a starting point for further dialogue and collaboration. We hope that you will use the *2024–25 Orange County Community Indicators* report as an engaging resource and guide, ultimately positioning Orange County as a leader in addressing the challenges facing communities across the country. We encourage you to share it with others who call Orange County home and who are committed to its future.

Sincerely,

JEFFREY BALL
President and CEO
Orange County Business Council

KIMBERLY GOLL
President and CEO
First 5 Orange County

SHELLEY M. HOSS
Chief Executive Officer
Orange County Community Foundation

MICHAEL HUNN
Chief Executive Officer
CalOptima Health

SUSAN B. PARKS
President and CEO
Orange County United Way

ACKNOWLEDGEMENTS

ORANGE COUNTY PROFILE

PLACE/LAND USE

799 land area (square miles)

42 miles of coastline

3,943 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.

At the heart of Southern California, Orange County encompasses an incredible amount of geographical, cultural, and economic diversity, with a landscape encompassing 799 square miles of land including 42 miles of coastline and 12 miles set aside as Marine Protected Areas (MPAs). The county's population is one of the most diverse in the United States; it has, for instance, the second highest proportion of foreign-born residents in Southern California. Over the years, Orange County has separated itself from other counties in the region by registering the highest educational attainment and median household incomes, supported by both an interconnected, collaborative academic system and a well-educated workforce able to fill open positions across a diversified industry cluster base.

Despite declining inflation trends, Orange County's cost of living — especially the cost of housing — remains high. For instance, only 17 percent of first-time homebuyers can afford an entry-level home. While cities and regions across the state and nation have affordability concerns, these concerns are especially severe in Orange County.

While high demand and low supply have made Orange County's housing market historically unaffordable, the county's commercial real estate market has the exact opposite problem; as of Q2 2024, overall vacancy rates had risen to 14.7 percent (a ten-year high) while asking rates had fallen to $2.85 per square foot, a seven-year low. Annual net absorption fell to -561,981 square feet, and office property investment sales in the region declined 41.5 percent year-over-year.[1] Orange County is not alone in these struggles. At the national level, over $38 billion worth of office buildings face defaults or foreclosures, the most since 2012.[2] Despite these residential and commercial real estate trends, Orange County's labor market remains especially resilient with an unemployment rate of 4.0 percent as of June 2024. This rate is well below that of neighboring peer counties, the state, and nation.

Nationwide, the U.S. Bureau of Labor Statistics reports slower hiring across the nation with total nonfarm employment averaging 222,000 per month so far in 2024, compared to 289,000 in 2023 and 431,000

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[1] https://mktgdocs.cbre.com/2299/9f94e7d6-82ce-4ed1-8af7-aedadecd8299-1679500925/v032024/orange-county-office-figures-q2-2024.pdf

[2] https://www.wsj.com/real-estate/commercial/office-buildings-past-due-loans-record-51a373a6

in 2022. Hiring rates remain significantly higher than the pre-pandemic average of 173,000 in 2019.[3,4] While a gradually rising unemployment rate was a consequence of increased interest rates from the Federal Reserve, it is important that policymakers and stakeholders keep an eye on labor market trends to help ensure market stability. Many executives expect the Fed to begin cutting interest rates as inflation trends continue to fall, increasing the likelihood of a 'soft' landing. Some indicators, however, suggest that the economy may be weaker than perceived, as indicated by Cal State Fullerton's declining Orange County Business Expectations Index for the last two quarters, detailed later in this section.
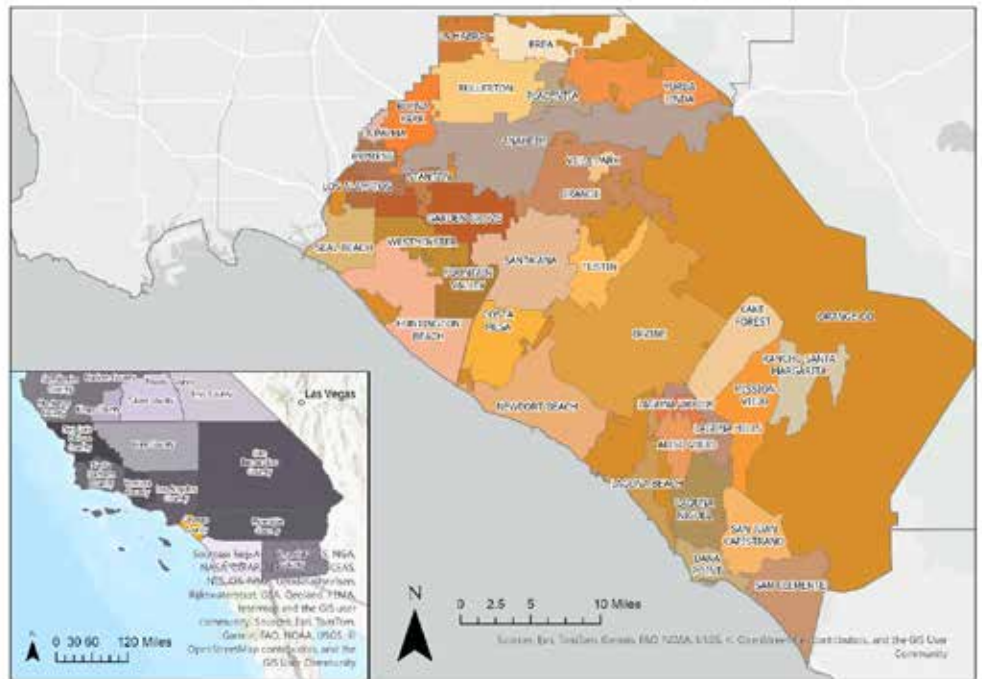
After three years of population decline, Orange County's population saw a marginal increase, going from 3,142,277 in 2023 to 3,142,387 in 2024. A similar trend occurred at the state level, with California's population increasing by 0.03 percent after a 1.1 percent decline over the previous three years. Despite some of the nation's most expensive housing, the state and county's strong labor market, growing economies, and overall quality of life continue to attract new residents.

Orange County remains the third most populated county in California, behind Los Angeles and San Diego counties and ahead of Riverside County. It is the nation's sixth largest county with a population larger than nineteen states.

POPULATION DENSITY

Orange County has an average population density of 3,933 residents per square mile, 4.7 percent more than in 2010 and only a slight increase over 2023. Orange County remains significantly denser than neighboring counties.

COUNTY POPULATION PER SQUARE MILE, 2024	
COUNTY	POPULATION PER SQUARE MILE
Orange	**3,933**
Los Angeles	2,421
San Diego	835
Riverside	339
California (Statewide)	239
San Bernardino	109

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2023. Sacramento, California, May 2024. Esri.

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[3] https://data.bls.gov/timeseries/CES0000000001&output_view=net_1mth

[4] https://www.cnbc.com/2024/07/05/jobs-report-june-2024.html#:~:text=U.S.%20economy%20added%20206%2C000%20jobs,unemployment%20rate%20rises%20to%204.1%25&text=Nonfarm%20payrolls%20increased%20by%20206%2C000,gain%20of%20218%2C000%20in%20May.

DEMOGRAPHICS/ DIVERSITY

— **3,142,387** 2024 Population

— **3,144,158** 2060 Population

— **0.06%** Percent Growth

ORANGE COUNTY CONTINUES TO GROW OLDER

From 2021 to 2022, Orange County's median age increased from 39.2 to 39.5 years. The state-level median age also increased, from 37.6 to 37.9. Since 2012, the county's median age has increased by 2.8 years while the state's median age has increased by 2.4 years. The proportion of the county population aged 19 and under has declined from 26.6 percent to 23.6 percent while the proportion of the population aged 65 years and over has increased from 12.3 percent to 16.4 percent. As seen in the graph below, the proportion of county residents aged between 25 and 44 years is expected to decline from 26 percent of the population to 21 percent of the population over the next 36 years. The percentage of residents aged 65 and older, on the other hand, is expected to increase from 17 percent of the county population to 31 percent by 2060.

PROJECTED CHANGE IN AGE GROUP PROPORTIONS OF TOTAL ORANGE COUNTY POPULATION, 2024 AND 2060
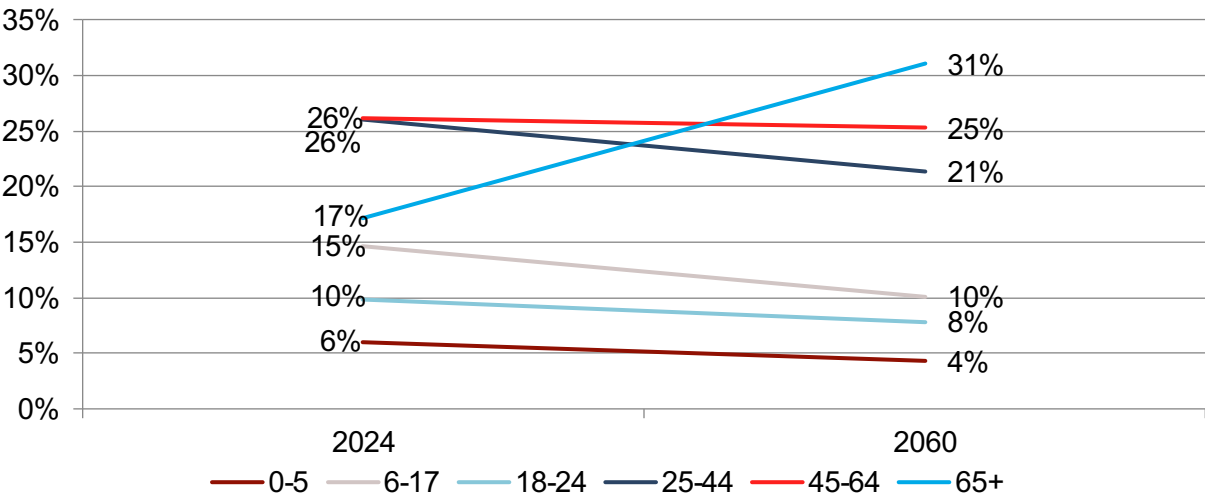
Legend: 0-5, 6-17, 18-24, 25-44, 45-64, 65+

Source: California Department of Finance. Demographic Research Unit. Report P-2B: Total Population Projections by Single Year of Age, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

OC RACIAL/ETHNIC DIVERSITY EXPECTED TO CONTINUE TO INCREASE

PROJECTED CHANGE BY RACIAL AND ETHNIC GROUPS AS PROPORTIONS OF THE TOTAL ORANGE COUNTY POPULATION, 2024 AND 2060
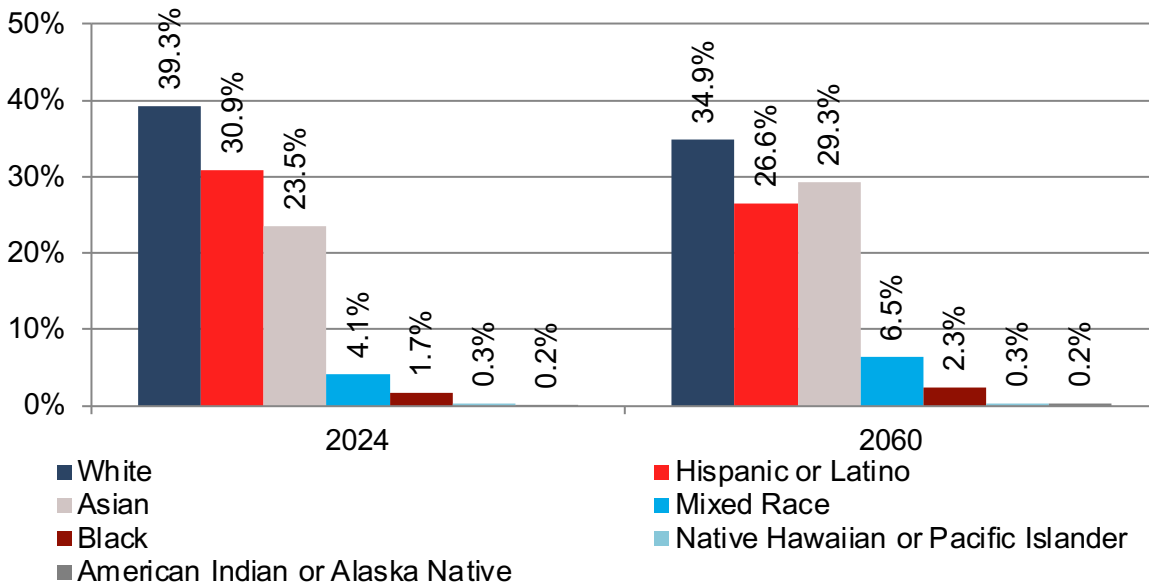
Source: California Department of Finance. Demographic Research Unit. Report P-2D: Population by Race and Ethnicity, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024. All racial/ethnicities besides Hispanic or Latino are non-Hispanic or Latino.

In terms of race or ethnicity, Orange County's White and Hispanic or Latino communities are expected to decline while Asian, Mixed Race and Black communities are expected to grow between 2024 and 2060. While the proportion of White residents will shrink from 39.3 percent to 34.9 percent, alongside a decline from 30.9 percent to 26.6 percent in the proportion of Hispanic or Latino residents; the proportion of Asian residents is expected to grow from 23.5 percent to 29.3 percent, Mixed Raced residents from 4.1 percent to 6.5 percent, and Black residents from 1.7 percent to 2.3 percent. The proportion of Native Hawaiian or Pacific Islander and American Indian or Alaska Native residents are expected to remain unchanged.

INTERNATIONAL RESIDENTS

30.2% of county residents were born in other countries

47.0% of all residents over age five speak a language other than English at home

The number of foreign-born residents in Orange County declined from 961,638 in 2021 to 953,096 in 2022, a decrease of 8,542 or almost 1 percent. In 2022, Orange County accounted for 2.1 percent of all foreign-born American residents and 9.1 percent of foreign-born California residents.

FOREIGN-BORN POPULATION IN ORANGE COUNTY SEES RARE DECLINE YEAR-OVER-YEAR

FOREIGN-BORN POPULATION METRICS BY SOUTHERN CALIFORNIA COUNTY, 2022		
COUNTY	FOREIGN-BORN POPULATION	% FOREIGN-BORN POPULATION
Los Angeles	3,220,852	33.1%
Orange	**953,096**	**30.2%**
San Diego	731,450	22.3%
San Bernardino	472,505	21.5%
Riverside	543,792	22.0%

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

TOP 10 COUNTRIES OF ORIGIN, 2022	
COUNTRY	POPULATION IN ORANGE COUNTY
Mexico	291,205
Vietnam	154,776
Korea	63,702
Philippines	57,089
China*	46,531
India	42,178
Iran	38,397
Taiwan	20,338
El Salvador	15,904
Canada	14,890

*Note - Foreign-born population from China excludes residents from Hong Kong and Taiwan.
Source: U.S. Census Bureau, American Community Survey, 1-year Estimates

ORANGE COUNTY POPULATION INCREASES FOR THE FIRST TIME SINCE 2019

After several years of population decline, Orange County's population increased from 3,142,277 in 2023 to 3,142,387 in 2024.

From 2022 to 2023, Orange County's population fell by 11,765, a decline of 0.4 percent. While natural increase (births minus deaths) added 7,241 residents and net immigration added 12,069 residents, net domestic migration was a loss of 31,075 residents, resulting in a net migration total of -19,006. For decades, negative net domestic migration has slowed overall population growth; between 2020 and 2023, more than 84,000 county residents moved from Orange County to other areas in the state and across the nation, an average of more than 28,000 per year. These declines reflect the county's high cost of living, especially higher housing costs.

ORANGE COUNTY INCOMES HIGHER, POVERTY LOWER THAN REGIONAL PEERS

BY THE NUMBERS SNAPSHOT

ORANGE COUNTY CHARACTERISTICS COMPARED TO REGIONAL PEERS, 2024					
COUNTY	MEDIAN HOUSEHOLD INCOME	MEDIAN AGE	POVERTY LEVEL (%)	MEAN COMMUTE TIME (IN MINUTES)	FOREIGN-BORN POPULATION (%)
Orange	**$106,209**	**39.5**	**9.9%**	**26.7**	**30.2%**
San Diego	$98,928	37.3	10.6%	25.5	22.3%
Los Angeles	$82,516	38.2	13.9%	30.1	33.1%
Riverside	$86,748	36.8	10.7%	33.1	22.0%
San Bernardino	$79,091	34.4	13.4%	32.1	21.5%
California (Statewide)	$91,551	37.9	12.2%	28.3	26.7%

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

PERCENT OF HOUSEHOLDS STRUGGLING TO MAKE ENDS MEET BY RACE/ETHNICITY, 2023
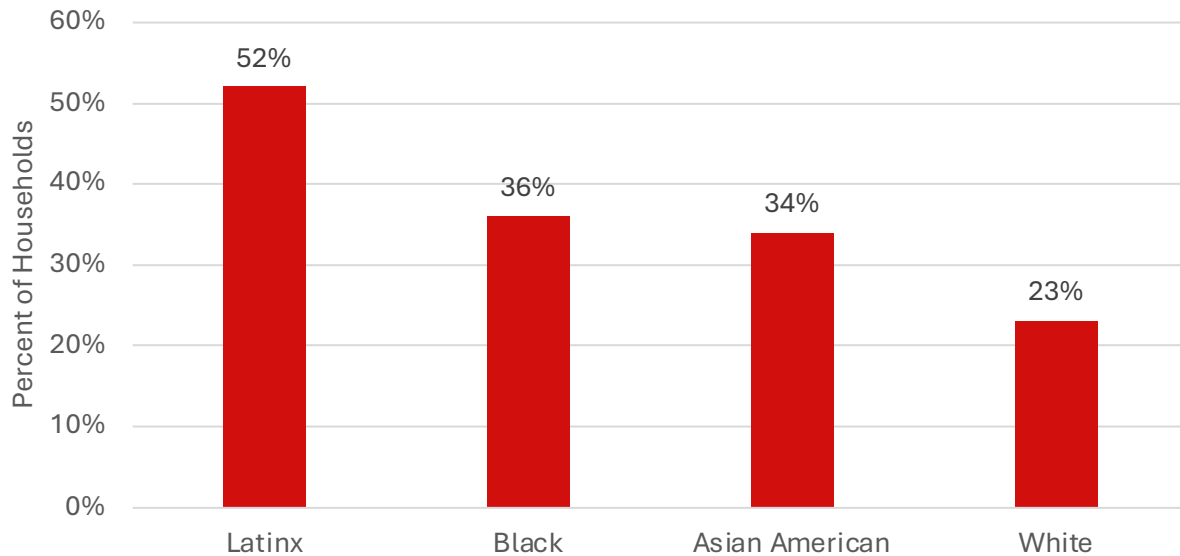
Source: Orange County United Way, How Much It Costs to Struggle: The Real Cost Measure in California 2023

However, the Orange County United Way's Real Cost Measure study found that 33 percent of Orange County households (approximately 302,844 total households) fell below the poverty line. This includes 52 percent of Orange County Latinx households and 36 percent of Black households but only 23 percent of White households, an illustration of disparities. This data also speaks to the importance of education, as 71 percent of households without a high school diploma or equivalent fall under that line, compared to only 19 percent of families with a bachelor's degree or above.[5]

[5] Orange County United Way, How Much It Costs to Struggle: The Real Cost Measure in California, 2023. https://unitedwaysca.org/realcost/

EDUCATIONAL ATTAINMENT

13.5% of adults over age 25 have less than a high school diploma

43.7% of adults over age 25 have a bachelor's degree or higher

ORANGE COUNTY REMAINS A LEADER IN EDUCATIONAL ATTAINMENT

ORANGE COUNTY EDUCATIONAL ATTAINMENT COMPARED TO PEER REGIONS		
COUNTY	BACHELOR'S DEGREE OR HIGHER	PERCENT GRADUATE OR PROFESSIONAL DEGREE
Orange County	**43.7%**	**16.2%**
San Diego County	43.0%	17.0%
California	37.0%	14.4%
Los Angeles County	35.6%	12.9%
United States	35.7%	14.0%
Riverside County	25.0%	9.2%
San Bernardino County	23.0%	8.5%

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

LABOR MARKET/BUSINESS COMMUNITY

OC MEDIAN HOUSEHOLD INCOMES 16 PERCENT ABOVE STATE, 42 PERCENT ABOVE NATION

LABOR MARKETS REMAIN STRONG ACROSS THE COUNTY

$106,209 Median household income (2022)

$1,450,000 Median existing single-family home price (June 2024)

4.0% Unemployment rate (June 2024)

EMPLOYMENT

ORANGE COUNTY HAS LOWEST UNEMPLOYMENT RATE IN THE REGION

ORANGE COUNTY INCOME AND UNEMPLOYMENT RATE REGIONAL COMPARISON		
COUNTY	MEDIAN HOUSEHOLD INCOME (2022)	UNEMPLOYMENT RATE (JUNE 2024)
Orange	**$106,209**	**4.0%**
Los Angeles	$82,516	5.9%
Riverside	$86,748	5.4%
San Bernardino	$79,091	5.2%
San Diego	$98,928	4.5%
California	$91,551	5.3%
United States	$74,755	4.3%

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

DISNEY, UCI, AND PROVIDENCE ARE OC'S LARGEST EMPLOYERS

LARGEST EMPLOYERS IN ORANGE COUNTY, 2024	
COMPANY	EMPLOYMENT IN ORANGE COUNTY
The Walt Disney Co.	34,000
University of California, Irvine	26,072
Providence Southern California	23,632
County of Orange	18,000
Kaiser Permanente	10,293
Hoag Memorial Hospital Presbyterian	8,081
Albertsons Southern California Division	7,222
Allied Universal	6,145
MemorialCare	5,800
CHOC (Children's Hospital of Orange County)	5,462
Cedar Fair LP	5,400
Boeing Co.	5,280
Edwards Lifesciences	4,894
Costco Wholesale Corp.	4,654
California State University, Fullerton	4,211
Applied Medical Resources Corp.	3,648
Automobile Club of Southern California	3,425
Tenet Healthcare Corp.	3,400
In-N-Out Burger Inc.	2,658
Blizzard Entertainment	2,450

Source: Orange County Business Journal, 2024 Book of Lists

HEALTHCARE AND MANUFACTURING HEAVY IN CENTRAL AND NORTH OC; PROFESSIONAL AND TECHNICAL SERVICES DOMINANT IN SOUTH OC

DOMINANT INDUSTRY BY CENSUS TRACT IN ORANGE COUNTY, 2024

Orange County's thriving, diverse economy — fueled by world-class industry clusters ranging from Tourism to Medical Device Manufacturing — both encourages entrepreneurship and innovation and ensures that the county is more resilient to economic shocks than other regions dependent on a single industry due to strong diversity of businesses. This economy's foundation is of course the county's highly educated population, which in turn is a product of its strong educational system.
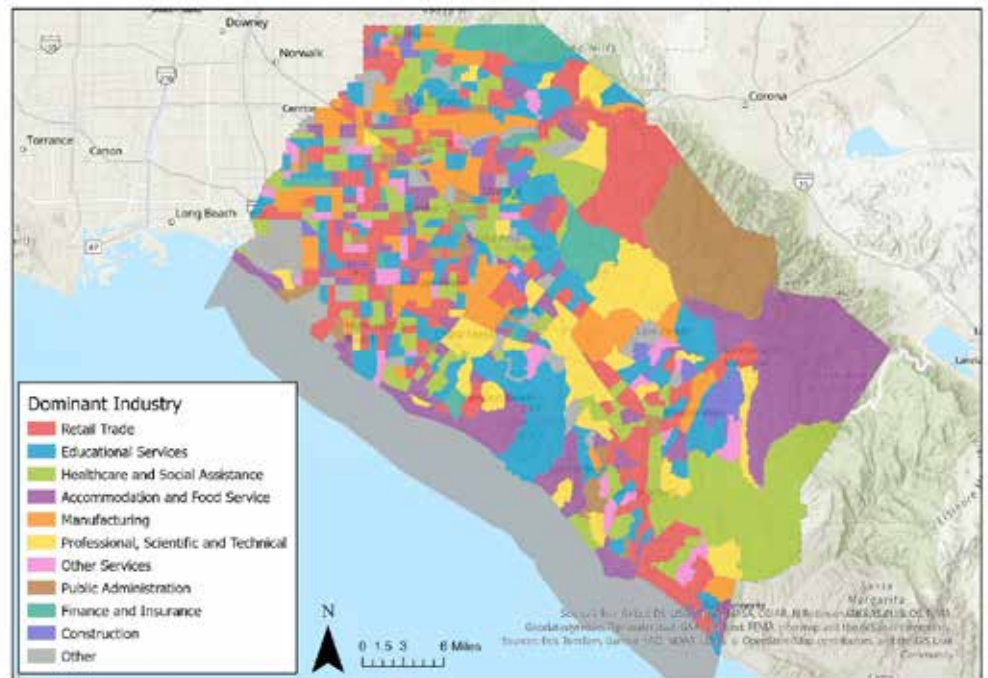
World-class industry clusters are significant because they fuel innovation and growth; they involve high concentrations of complementary and supplementary business and industries which accelerate economic activity through increased collaboration and competition. Further supporting these industry clusters — especially through targeted workforce training programs — would continue to benefit the entire county's economy.

While industry clusters will be explored in more depth later in this report, the following table provides the top county industries by employment concentration. Employment concentrations indicate how sizable an industry is in a given geographic region compared to the national average. For example, an industry with an employment concentration of '2' is twice as represented in that region compared to the national average, helping:

• identify regional specializations and industry sectors of opportunity for leaders to better leverage local advantages, workforce talent, and investments; and

• identify industries that are most resilient to economic shocks.

16

TOP ORANGE COUNTY INDUSTRIES BY EMPLOYMENT CONCENTRATION, 2024	
INDUSTRY	EMPLOYMENT CONCENTRATION
Amusement and Theme Parks	14.64
Dental Laboratories	10.53
Electromedical and Electrotherapeutic Apparatus Manufacturing	9.69
Nonferrous Forging	9.12
Computer Storage Device Manufacturing	8.32
Bare Printed Circuit Board Manufacturing	7.52
Surgical and Medical Instrument Manufacturing	7.33
Fluid Power Pump and Motor Manufacturing	6.77
Plumbing Fixture Fitting and Trim Manufacturing	6.76
Dental Equipment and Supplies Manufacturing	6.61
Electronic Connector Manufacturing	5.49
Ophthalmic Goods Manufacturing	5.34
Bolt, Nut, Screw, Rivet, and Washer Manufacturing	5.28
Audio and Video Equipment Manufacturing	5.20
Electric Lamp Bulb and Other Lighting Equipment Manufacturing	5.10
Computer Terminal and Other Computer Peripheral Equipment Manufacturing	4.92
Exam Preparation and Tutoring	4.87
Other Aircraft Parts and Auxiliary Equipment Manufacturing	4.84
Guided Missile and Space Vehicle Manufacturing	4.67
Apparel Knitting Mills	4.61

Source: Lightcast

BUSINESSES OF ALL SIZES THRIVE IN ORANGE COUNTY

96 PERCENT OF ALL OC BUSINESSES EMPLOY LESS THAN 50 WORKERS, ACCOUNT FOR 44 PERCENT OF ALL WORKERS

NUMBER OF BUSINESSES AND EMPLOYEES, BY SIZE OF BUSINESS, 2023
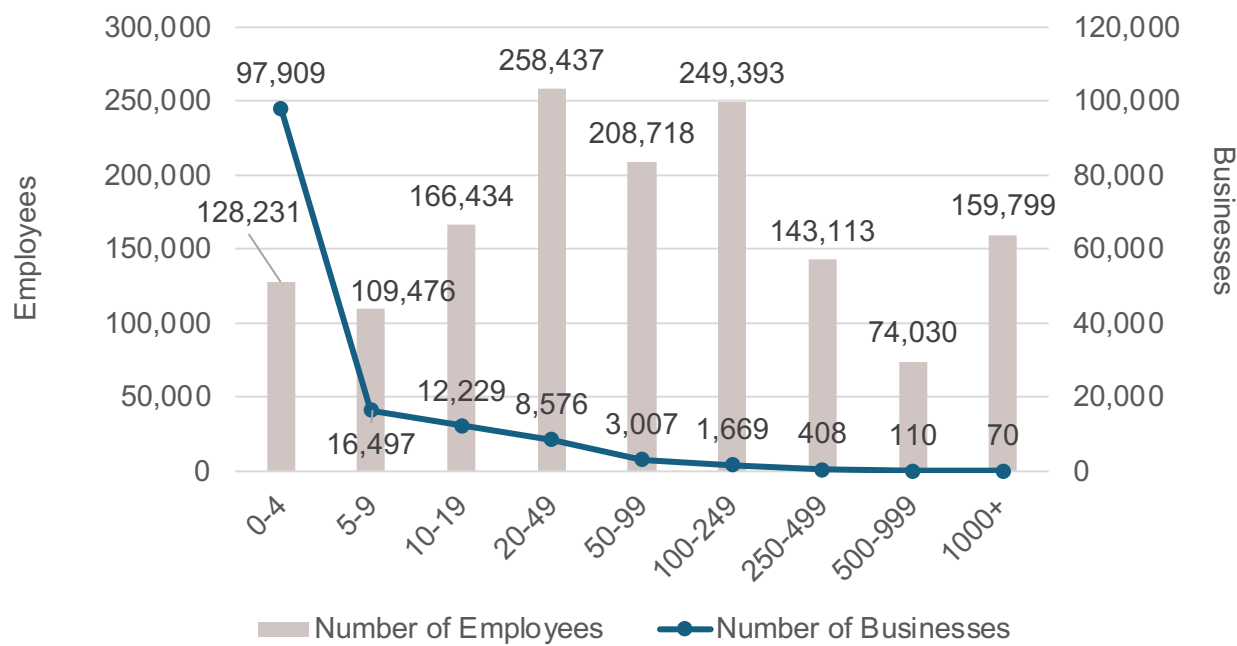
Source: California Employment Development Department, Size of Business Data 2023

Small businesses — defined as those with 50 or fewer employees — represent the vast majority (96.3 percent) of Orange County businesses. These predominately family-owned businesses employed 662,578 workers in 2023, accounting for 44.2 percent of the county's workforce.

While the number of businesses with over 500 employees declined from 187 in 2022 to 180 in 2023, the number of businesses with more than 1,000 employees increased from 67 to 70.

ORANGE COUNTY GRP GREATER THAN THAT OF 26 STATES

GROSS REGIONAL PRODUCT IN OC INCREASES BY 3.5 PERCENT SINCE LAST YEAR

Orange County's gross regional product (GRP), a county-level equivalent of gross domestic product (GDP), jumped from $316 billion in 2022 to $327 billion, an increase of 3.5 percent. The county's GRP remains larger than that of 26 states, including Oregon, South Carolina, and Louisiana.

GROSS REGIONAL PRODUCT AND EMPLOYMENT COMPARISON BY SOUTHERN CALIFORNIA COUNTY							
COUNTY	TOTAL POP. (2024)	TOTAL EMP. (JUNE 2024)	TOTAL GRP ($ IN B)	EMP. PER SQUARE MILE	EMP. PER CAPITA	GRP PER SQUARE MILE	GRP PER CAPITA
Orange	**3,142,387**	**1,512,700**	**$327**	**1,893**	**0.49**	**$409,169,180**	**$104,038**
San Diego	3,310,718	1,509,400	$309	383	0.46	$78,313,253	$93,246
Los Angeles	9,784,023	4,767,000	$904	1,175	0.49	$222,777,988	$92,399
San Bernardino	2,180,503	955,100	$124	48	0.44	$6,161,846	$56,679
Riverside	2,441,474	1,089,900	$116	151	0.45	$16,125,517	$47,594

Source: Lightcast; California Department of Finance. Demographic Research Unit. Report P-2A: Total Population Projections, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

EMPLOYMENT PER SQUARE MILE BY SOUTHERN CALIFORNIA COUNTY, 2024

Southern California Counties
Employment Per Square Mile
- 15
- 48
- 151
- 213
- 383
- 1,175
- 1,893
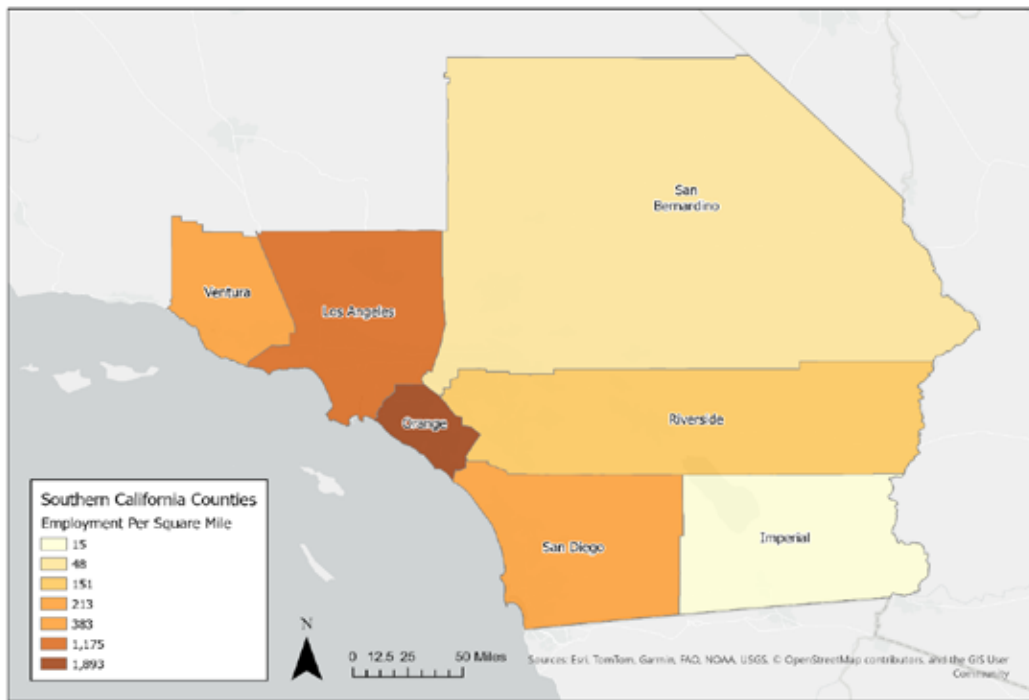
GROSS REGIONAL PRODUCT (GRP) PER SQUARE MILE BY SOUTHERN CALIFORNIA COUNTY, 2024

Southern California Counties
GRP Per Square Mile
- $2,144,538
- $6,161,846
- $16,125,517
- $35,106,212
- $78,313,253
- $222,777,988
- $409,169,180

OC BUSINESS EXPECTATIONS SEE DECLINE IN Q3 2024

ORANGE COUNTY BUSINESS EXPECTATIONS INDEX, Q1 2014 – Q3 2024
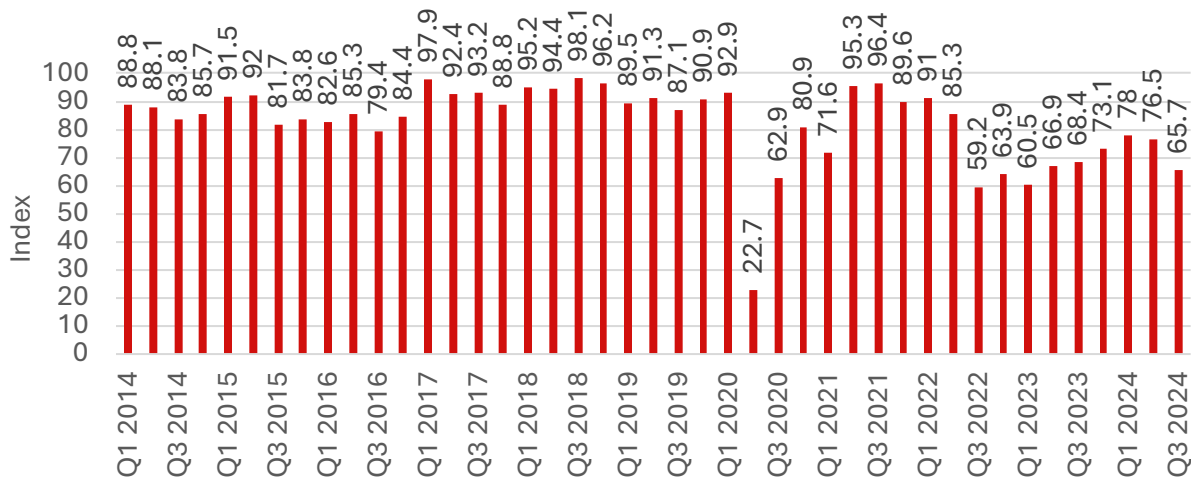
An index above 50 indicates expansion

Source: California State University, Fullerton

California State University Fullerton's (CSUF) Orange County Business Expectations Index (OCBX) dropped in Q3 2024, falling from 76.5 in Q2 2024 to Q3 65.7. This marks the second consecutive quarterly decline in the OCBX, indicating that business sentiment and expectations are softening. Among Orange County executives surveyed, 28.3 percent identified interest rates as their most important concern, while 26.4 percent pointed to inflation.

Looking forward, 67.9 percent of executives plan to keep hiring stable while 22.6 percent expect hiring to increase and 9.4 percent expect a decline. Expectations for economic growth are fairly evenly split at this point; approximately a third of business executives expect increased activity, while another third expect stability and a final third expect decreased activity.[6]

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[6] https://business.fullerton.edu/engagement/economic-analysis-and-forecasting/assets/pdf/Q3-2024-OCBX-Report.pdf

TRAVEL/TOURISM

PASSENGER VOLUME STEADY AS TRAVEL COSTS RISE

TOTAL MONTHLY PASSENGERS SERVED AT JOHN WAYNE AIRPORT, MAY 2019 – MAY 2024
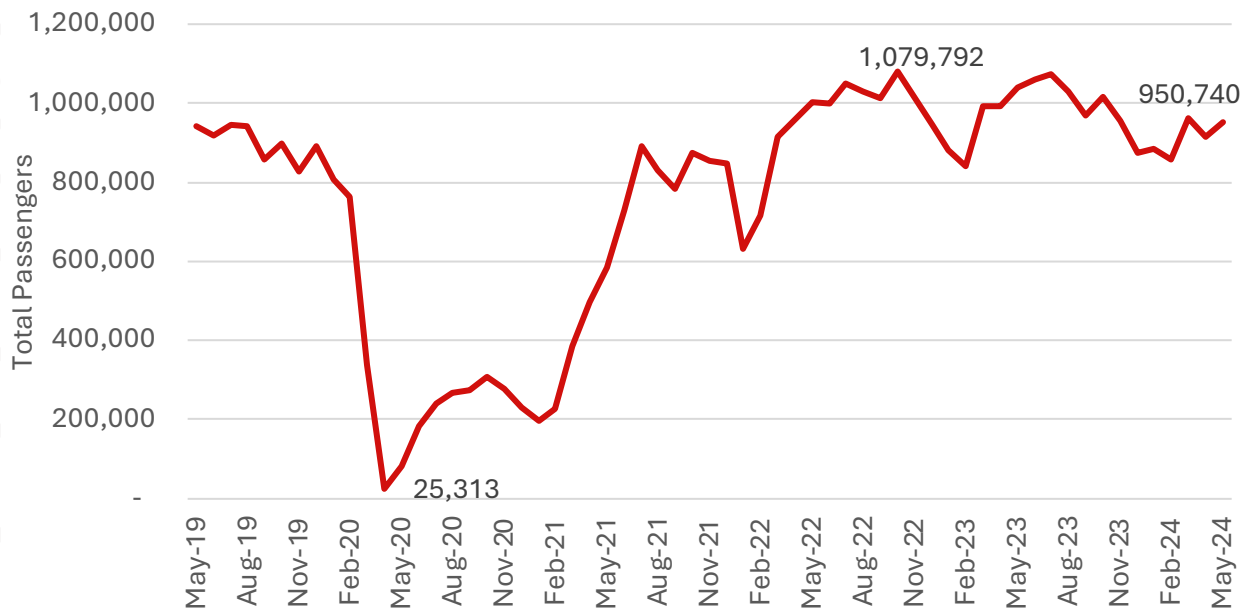
Source: OCair.com

Total monthly passenger volume at John Wayne Airport (JWA) was 950,740 in May 2024, a year-over-year decrease of 8.7 percent. After peaking at 1,079,792 in October 2022, monthly traffic has plateaued at a slightly lower level, with an average of 914,583 thus far in 2024. While Orange County remains a key tourist destination, rising travel costs due to inflationary trends may have decreased demand.

ORANGE COUNTY TRAVEL SPENDING, 2013–2023
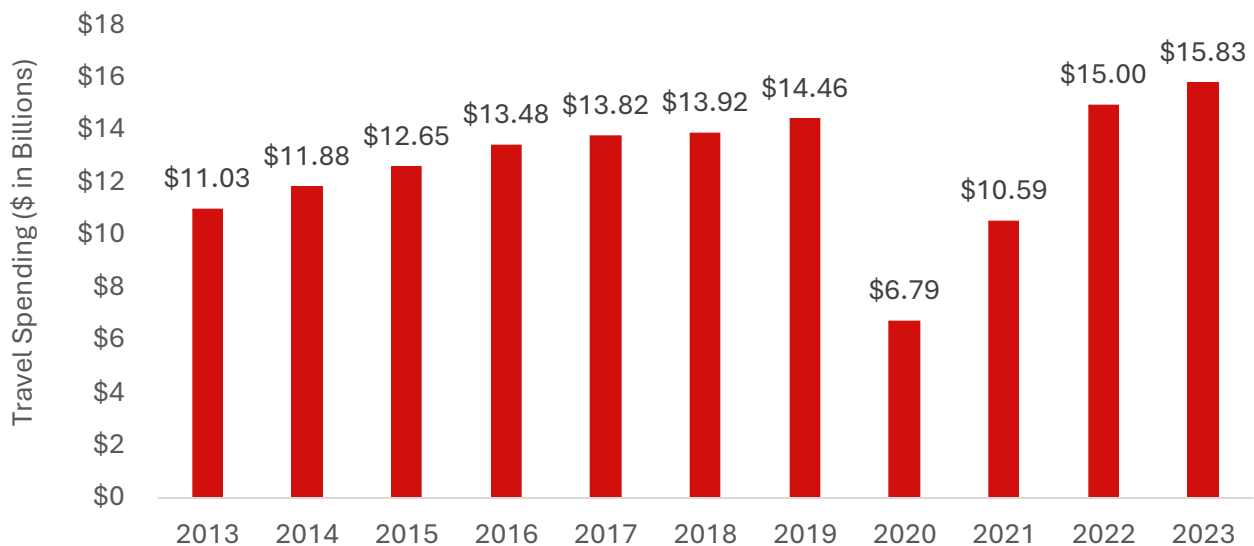
Source: VisitCalifornia.com, Economic Impact of Travel in California, 2013-2023

Visitor spending in Orange County increased by 5.5 percent between 2022 and 2023: from $15 billion to $15.8 billion. After hitting a low of $6.8 billion in 2020 due to the pandemic, visitor spending rebounded by 56.1 percent in 2021 and 4.2 percent in 2022 and has now exceeded pre-pandemic highs. Even with the pandemic, Orange County visitor spending has increased by an average of 7.8 percent each year since 2013.

ORANGE COUNTY TRAVEL SPENDING BY INDUSTRY, 2023

Industry	Travel Spending ($ in Millions)
Food Service	$ 3,805
Accommodations	$ 3,746
Arts, Entertainment, & Recreation	$ 2,891
Retail Sales	$ 2,280
Food Stores	$ 623
Visitor Air	$ 465
Local Transportation & Gas	$ 358
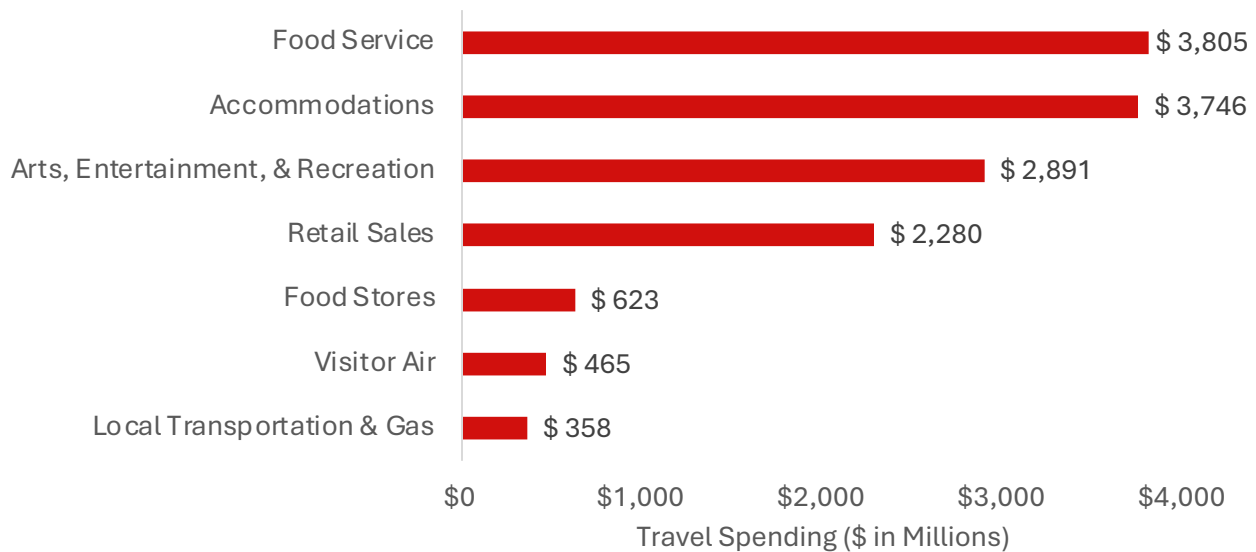
Source: VisitCalifornia.com, Economic Impact of Travel in California, 2014-2023

The largest areas of visitor spending in Orange County were:

• Food Service ($3.8 billion);

• Accommodations ($3.7 billion); and

• Arts, Entertainment and Recreation ($2.9 billion).

Over the past year, Visitor Air spending saw the largest increase, growing by 8.7 percent beating out Arts, Entertainment and Recreation (+6.8 percent) and Accommodations (+6.7 percent). Growth in Visitor Air spending was likely driven by the increasing cost to travel, primarily airfares.[7] Overall, visitor spending generated $1.3 billion in local and state tax receipts.

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[7] Airline Ticket Prices Are Outpacing Inflation. Here's How You Can Save (cnbc.com)

QUALITY OF LIFE

STATE CRIME INDEX RISES, ORANGE COUNTY FALLS

OC SEES PERSONAL AND PROPERTY CRIME FALL, TOTAL CRIME INDEX WELL BELOW STATE AVERAGE

Orange County's Total Crime Index registered a welcomed decline, falling from 107 in 2023 to 95 in 2024; on the ranked list, it fell from 5th place among peers and neighbors to 2nd, behind only San Diego County. Except for Orange, San Diego, and Los Angeles counties, which all registered lower crime levels compared to last year, crime levels increased throughout California. This was especially true of San Francisco County, which had the highest Total Crime Index among peer regions. As seen below, Orange County's Total Crime Index of 95 was below both the state average of 113 and the national average of 100.

ORANGE COUNTY AND REGIONAL CRIME INDEXES, 2024			
COUNTY	TOTAL CRIME INDEX	PERSONAL CRIME INDEX	PROPERTY CRIME INDEX
San Diego County	81	86	81
Orange County	**95**	**70**	**99**
Boston (Suffolk County)	103	165	92
Santa Clara County	105	82	109
Sacramento County	106	117	104
Riverside County	110	93	114
San Bernardino County	110	134	105
California	113	117	113
Los Angeles County	119	143	115
Austin (Travis County)	131	95	137
Minneapolis (Hennepin County)	135	121	138
Dallas County	135	132	136
Seattle (King County)	169	96	183
San Francisco	240	165	254

Note: An index value of 100 represents the national average.
Source: Esri Crime Index Data

CRIME INDEX COUNTY COMPARISON, 2024

County	Crime Index
San Francisco	240
Seattle (King County)	169
Minneapolis (Hennepin County)	135
Dallas County	135
Austin (Travis County)	131
Los Angeles County	119
California	113
Riverside County	110
San Bernardino County	110
Sacramento County	106
Santa Clara County	105
Boston (Suffolk County)	103
Orange County	95
San Diego County	81
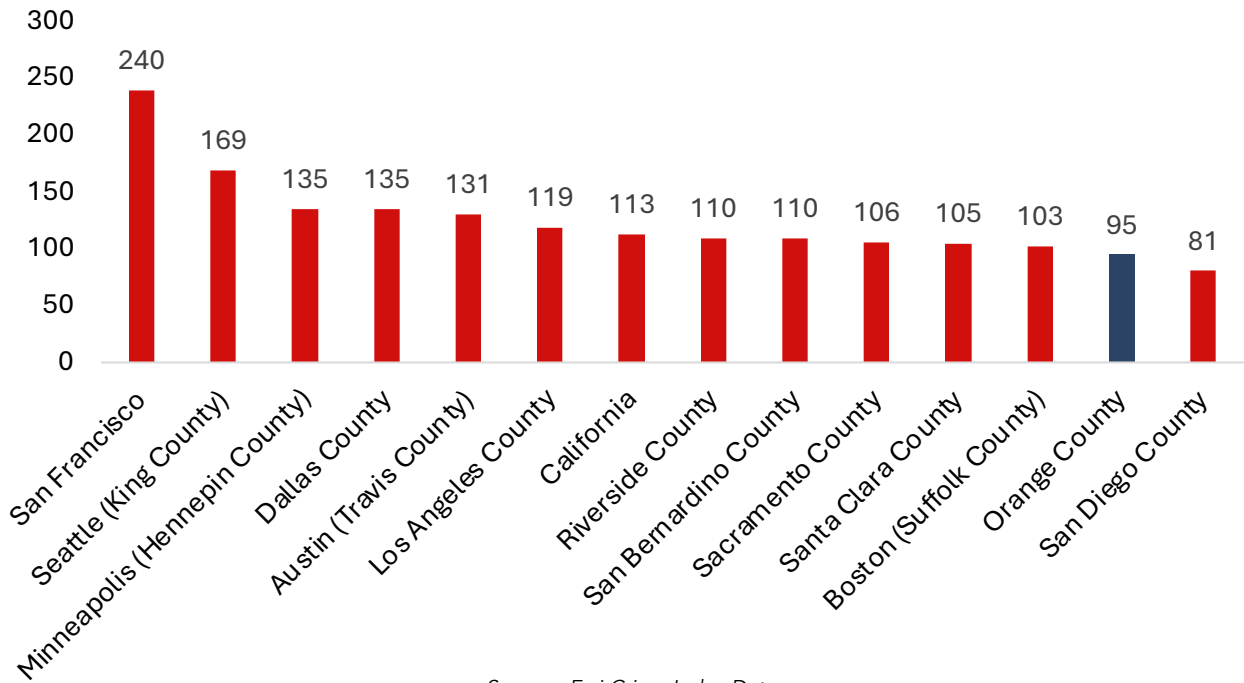
Source: Esri Crime Index Data

WALLETHUB'S BEST PLACES TO RAISE A FAMILY - ORANGE COUNTY CITIES AND SCORES, 2024						
RANK	CITY	FAMILY FUN	HEALTH & SAFETY	EDUCATION & CHILD CARE	AFFORD-ABILITY	SOCIO-ECONOMICS
3	Irvine, CA	21	1	2	49	13
10	Huntington Beach, CA	84	18	4	81	8
56	Garden Grove, CA	47	19	14	171	53
104	Anaheim, CA	38	59	75	172	46
124	Santa Ana, CA	102	28	69	180	35

Source: WalletHub

Irvine held on to its 3rd place rank in WalletHub's ranking of the *Best Places to Raise a Family* in 2024; it finished 1st in Health & Safety, 2nd in Education & Child Care, and 13th in Socioeconomics. While Irvine saw improvements to its Family Fun rank (22nd to 21st), it fell slightly in Affordability (48th to 49th) and saw its Socioeconomics rank drop as well (from 5th to 13th). Behind Irvine, Huntington Beach rose in the rankings from 14th to 10th, from 31st in Health & Safety to 18th, from 9th to 8th in Socioeconomics, and from 82nd to 81st in Affordability, while its Family Fun ranking fell from 79th to 84th.

Both Garden Grove and Santa Ana also saw improvements in their rankings with Garden Grove climbing from 72nd to 56th and Santa Ana from 144th to 124th. Meanwhile, Anaheim was the only Orange County city to fall down the rankings (from 95th to 104th) due to declines in Health & Safety (47th to 59th), Education & Child Care (65th to 75th), and Socioeconomics (37th to 46th).

SPECIAL FEATURE

25TH ANNIVERSARY OF THE ORANGE COUNTY COMMUNITY INDICATORS REPORT

"As Orange County enters the 21st century," to quote the beginning of the *1999 Orange County Community Indicators*, "it is critical to annually measure regional progress through a full range of social, economic, and environmental indicators." *The Orange County Community Indicators Report* (OCCIR) initiative has done just this since 1999, tracking Orange County's progress through a variety of changes and challenges: Y2K, the dot-com bubble, the aftermath of 9/11, the Great Recession, the rise of e-commerce and subsequent "retail apocalypse," the COVID-19 pandemic, post-pandemic supply chain issues, continuing inflation, the skills gap, and a long-term housing shortage. In doing so, the OCCIR has created a trusted resource for business leaders, policy makers, local educators, and others interested in a well-rounded look at Orange County and its communities. The annual launches of the *Community Indicators* report have become part of the calendar for the county's business and nonprofit communities. The report itself has consistently offered a comprehensive, accessible overview of the county's economy, providing an annual checkup for its economic, community, and educational health.

In addition to providing this overview, the 25th anniversary edition of the *Community Indicators* will look back at the past quarter-century, focusing on both Orange County's incredible transformation over that period and on what has stayed the same. While the county has experienced tremendous economic growth since 1999, it also faces some of the same challenges that it did in that year; fortunately, it also retains some of the key strengths that were already fueling prosperity and growth before the turn of the millennium. These strengths, as seen both in this section and throughout this report, will likely serve as foundations for continued growth and prosperity over the next 25 years.

One perspective on Orange County's recent history comes from the *Community Indicators* themselves, specifically the various special sections included in each report. As seen below, the titles of these sections speak to many of the key challenges — and opportunities — faced by the county since 1999. From the impact of historical events such as the subprime mortgage crisis and the COVID-19 pandemic to ongoing challenges such as homelessness and land use, the *Community Indicators* reports have reflected the key trends affecting Orange County over the past 25 years.

OC COMMUNITY INDICATORS SPECIAL SECTIONS OVER TIME

- 2001: OC Image Survey, Census Participation, Senior Well-being
- 2002: Electric Power and 2000 Census
- 2003: OC's Workforce, Infrastructure Conditions, Pediatric Asthma
- 2004: Public Sector Finances and School Capacity
- 2005: Perception vs. Reality and Land Use Efficiency
- 2006: Arts and Culture and Homelessness in Orange County
- 2007: Income Polarization, Nonprofit Sector Capacity and Migration Trends: A Young Adult Exodus
- 2008: Special Education and Housing Trends
- 2009: High School Dropout Rates, Home Value Stability and Orange County Sustainability Index
- 2010: OC Community Indicators: A Decade in Review, OC Sustainability, Renewable Energy and Green Jobs
- 2011: Well-being Index
- 2012: Population Growth Trends and Emerging Trends in Real Estate
- 2013: Wireless Connectivity and Collaborative Community Solutions
- 2015-2018: Housing, Opportunity Gap, Children's Health and Well-being Pivot Points
- 2019: US Census
- 2020–2021: US Census, COVID Impacts
- 2021–2022: Future of Work, COVID Demographic, Remote Work and Housing
- 2022–2023: Remote Work – Trends and Implications
- 2023–2024: Housing

The rest of this special section will provide a high-level overview of the county's history over the past 25 years, focusing on the most important economic and demographic trends, as well as thoughts on where Orange County may be in 25 years. It will cover both the most important changes, the most important aspects of the county that have largely remained the same, and where the county may be going as it closes in on 2050.

ORANGE COUNTY IN 1999

Like the rest of the world, Orange County has changed significantly over the past 25 years. Orange County had a population of approximately 2.78 million in 1999, with a median household income of $58,820 and a median home price of $275,556. Its largest cities were Santa Ana (population 331,323) and Anaheim (population 319,727). It had an unemployment rate of 2.7 percent with a total of 1,423,800 employees and 39,400 unemployed residents, giving a total labor force of 1,463,200. The county's largest industries were:

- Durable Goods Manufacturing (152,300 jobs);
- Retail Trade (144,300 jobs); and
- Government (141,100).

ORANGE COUNTY INDUSTRY EMPLOYMENT, 1999

Industry	Employment
Durable Goods	152,300
Retail Trade	144,300
Government	141,100
Administrative, Support, Waste Remediation	112,700
Accommodation and Food Services	109,100
Health Care and Social Assistance	94,900
Professional, Scientific, Technical Services	88,200
Wholesale Trade	80,500
Construction	72,500
Finance and Insurance	70,300
Non-Durable Goods	62,200
Other Services	43,000
Management of Companies and Enterprises	37,300
Information	36,900
Real Estate and Rental and Leasing	30,800
Arts, Entertainment, and Recreation	29,000
Transportation, Warehousing, and Utilities	28,600
Private Educational Services	17,100
Mining and Logging	700

Source: California Employment Development Department

The first *Community Indicators* report came out years before smartphones, streaming video, mainstream social media, the gig economy, widespread remote work, and generative AI — and, indeed, before the internet itself became quite as mainstream as it is today. According to the 1999 *Community Indicators* report, for instance,

The internet is rapidly becoming a mainstream medium with far-reaching impacts on every aspect of our lives. Reaching the 50 percent usage threshold means greater acceptance of this new communications and business tool.

In that year, Orange County had the third highest internet connectivity (approximately 54 percent) among major US metropolitan areas. This slim majority of Orange County adults who were online in 1999 would have experienced a very different internet: one without Facebook (or even Myspace), Twitter/X, YouTube, or Reddit.

It also came just months before the turn of the millennium, in the era of Y2K: fears that the switch from 1999 to 2000 would lead to devastating computer bugs. In the months leading up to New Year's Eve, discussions about Y2K and its potential impacts dominated news segments and water cooler conversations. While these particular concerns turned out to be overblown, hindsight makes the Y2K phenomenon a foreshadowing of the very real challenges posed by digital technology, from the e-commerce-fueled "Retail Apocalypse" to ongoing automation and the disruptive potential of AI, machine learning, and robotics. Then as now, long-term planning will help Orange County — and its economy — navigate through technological transitions.

In addition to the internet, other key technologies have also transformed Orange County and the wider world: smartphones, Bluetooth connections, blockchain and cryptocurrency, mainstream electric vehicles and, of course, machine learning and AI. The development of Internet of Things (IoT) and related technologies, for instance, have combined with other technological developments to fuel growth and innovation in the county's Medical Device Manufacturing subsector.

While Orange County does not have the high-tech hotspot reputation of Silicon Valley or North Carolina's Research Triangle, it has boasted a successful, diverse tech industry for the past 25 years. The 1999 *Community Indicators,* for instance, notes that "Orange County is one of the most diverse high-tech economies in the U.S." In that year, Orange County's high-tech sector included ten of twelve possible high-tech industry clusters, tying it with New Haven, CT, and Santa Clara for second place behind Boston.

Twenty-five years later, the county's high-tech sector remains both diverse and successful. As of 2024, Orange County ranked 4th in Location Quotient (LQ) Count in Milken Institute's *Best Performing Cities Report,* beating out areas like Austin, TX; San Jose, CA; and San Diego, CA. While Orange County did slip from ranking 1st in LQ Counts in 2023 to 4th as of 2024, its Broadband Access rank rose from 10th to 2nd. (The county now trails Oakland, CA; Cambridge-Newton-Framingham, MA; and Santa Maria-Santa Barbara in LQ.) Broadband, as discussed elsewhere in this report, is absolutely essential in a world where more and more daily activities happen online; Orange County's nation-leading broadband access will continue to be a competitive advantage.

Another section of this report explores the county's high-tech sector in more detail.

While Orange County has grown significantly more diverse over the past 25 years, as explored elsewhere in this section (and this report), it is important to note that the county was already quite diverse in 1999. In that year, the county's largest population groups were Whites (61 percent of the population), Hispanics or Latinos (26 percent), and Asians (12 percent); another section of this report will cover these demographic changes in more detail.

CHANGE AND PERMANENCE

The county's physical and cultural landscape has also changed significantly, as many county landmarks opened over the past 25 years, including Disney California Adventure Park, Orange County Great Park, The Anaheim Regional Transportation Intermodal Center (ARTIC), Chapman University's Hilbert Museum of California Art, and the University of California, Irvine School of Law. The same period also saw several key Orange County open spaces officially designated as National Natural Landmarks or other types of protected spaces, including Irvine Ranch Open Space, the Dana Point State Marine Conservation Area, and the Laguna Beach State Marine Reserve.

At the same time, many strengths, weaknesses, and other aspects of the county have remained consistent over the past 25 years. The 1999 *Community Indicators,* for instance, refers to tourism as a pillar of the Orange County economy, which is equally true of the county in 2024. It also notes that the county had a significantly lower unemployment rate than its neighbors (as well as state and national averages). With a few exceptions, such as during the depths of the COVID-19 pandemic, this has remained consistently true.

Some challenges have also endured. Consider the following paragraph from the first *Community Indicators* report:

> A shortage of affordable housing (particularly for first-time buyers) may discourage young families from moving to Orange County or staying here after graduating from local colleges and universities. The high cost of housing ranks as the second highest barrier to doing business in Orange County (1999 Orange County Executive Survey) and was the most often cited barrier with a "severe impact".

A lack of affordable housing remains a significant challenge; as in 1999, the county's median home price is significantly higher than those of neighboring counties. The county's current median home sales price is approximately $1.45 million (as of June 2024), for instance, compared to much lower prices in the rest of Southern California:

- San Diego County: $1,054,180
- Los Angeles County: $889,180
- Ventura County: $964,500
- Riverside County: $643,500
- San Bernardino County: $522,500
- California: $900,720

Orange County doesn't just have the highest median home price in Southern California; it also had the fastest year-over-year home price growth over the past year. Orange County's home prices increased by 15.1 percent between June 2023 and June 2024. San Bernardino and San Diego counties had the second and third fastest year-over-year growth at 11.2 percent and 10 percent, respectively, with no other Southern California county experiencing regional growth rates of over 8 percent. While county developers have made progress toward increasing the housing supply, especially by converting former retail space, much work remains to be done in order to mitigate this trend's continuing severe impact.

It's equally important to note that Orange County has also maintained many strengths over the past quarter-century, such as its previously mentioned strong tourist industry. Much of the 1999 *Orange County Community Indicators* Highlights section, for instance, echoes the strengths of Orange County in 2024. Then, as now, the county boasts a higher-than-average per capita income, a relatively low unemployment rate, a diverse high-tech economy, and strong K-12 academic performance.

While the county's extremely high home prices represent a significant challenge, they also reflect the county's famous quality of life, which creates an extremely high demand to live here. This demand is also fueled by the county's strong job market, which in turn reflects the incredible success of its entrepreneurs and business leaders.

This job market is another strength that Orange County has retained over the past 25 years. In 1999, for instance, Orange County had an unemployment rate of 2.7 percent, significantly lower than its Southern California neighbors. With a few exceptions, this has been consistently true of the county since the very first *Community Indicators* report was published.

DEMOGRAPHIC CHANGE

Between 1999 and 2024, Orange County's population grew by approximately 13 percent, from about 2.74 million to about 3.1 million; this represents a slower growth rate than at the national (20.6 percent) and state (18.0 percent) levels. As noted in previous editions of the *Community Indicators* report, recent years have seen net population declines in Orange County. In 2020, for instance, the county's population declined by more than 24,500.

ORANGE COUNTY AND NEIGHBORING COUNTY POPULATION GROWTH, 1999–2024
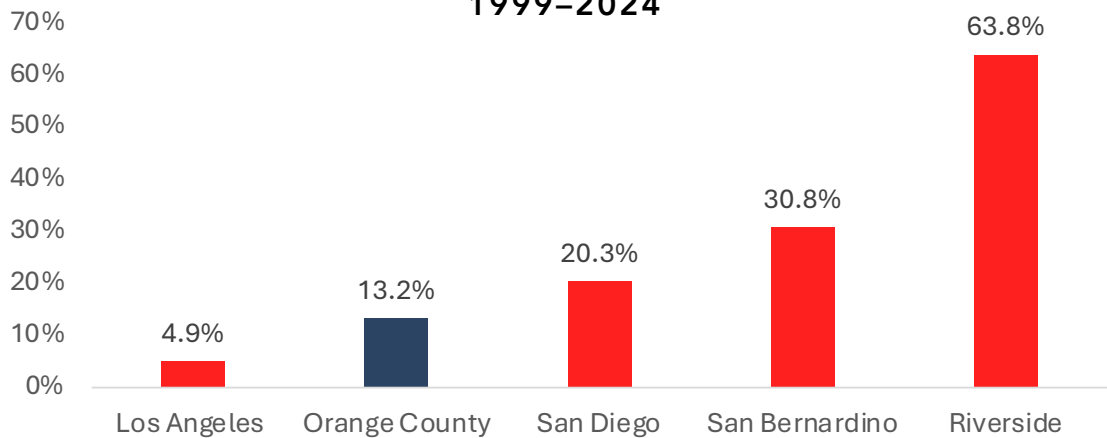
County	Growth
Los Angeles	4.9%
Orange County	13.2%
San Diego	20.3%
San Bernardino	30.8%
Riverside	63.8%

Source: California Department of Finance. Demographic Research Unit. Report P-2A: Total Population Projections, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

Orange County has grown significantly older over the past 25 years; the 65+ age group now makes up 16.4 percent of the county population, compared to 9.8 in 2000. The 45–64 age group also grew as a proportion of the county population, while the proportion of every age group aged 44 and under decreased.

ORANGE COUNTY PROPORTION OF POPULATION BY AGE GROUP, 2000–2022

Age Group	2000	2022
Under 5	7.5%	5.2%
5-14	15.5%	11.7%
15-24	13.3%	13.2%
25-44	33.4%	27.2%
45-64	20.5%	26.3%
65+	9.8%	16.4%
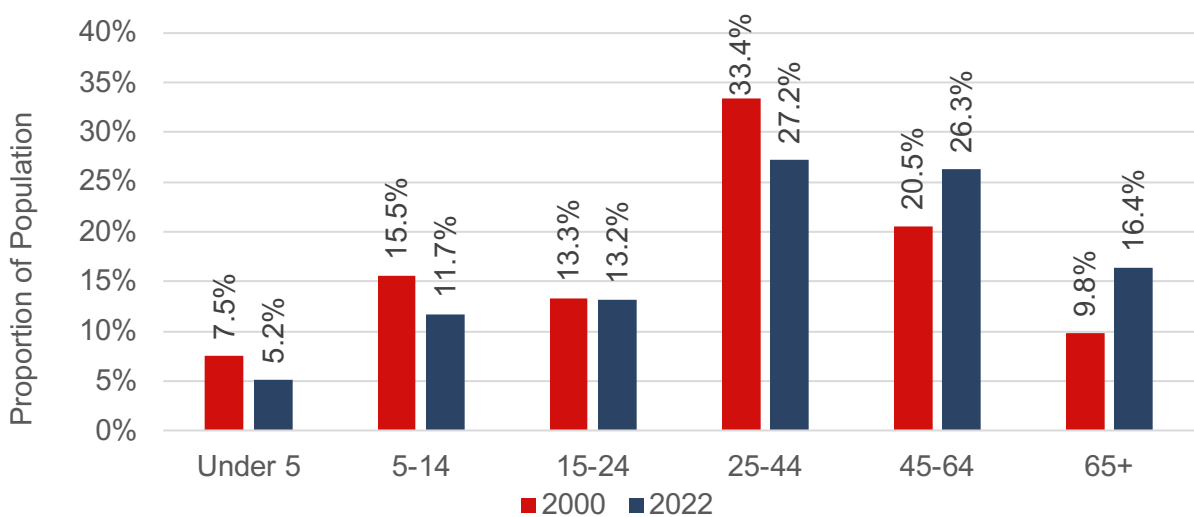
Source: U.S. Census Bureau, American Community Survey

This demographic shift has several potential consequences for the county, some of which include:

- First and most obviously, an older population will require additional Healthcare services.

- Second, this trend has implications for the county's housing market because older homeowners are less likely to sell their homes.

- Third, an aging population has already led to declining enrollments at Orange County public schools. If this trend continues, it could lead to a shallower talent pool and a higher dependency ratio.

Orange County's population has also become significantly more diverse — in fact, it has become one of the most diverse counties in the United States. According to the most recent US Census Bureau statistics, for instance, approximately 29.5 percent of the county's population was born outside the United States, compared to 13.7 percent at the national level. White non-Hispanics' share of the population decreased from 51.1 percent to 37.1 percent from 2000 to 2022 while the populations of Hispanic, Asian, and residents who identify as 'two or more' races have all increased as a percentage of the county's population.

ORANGE COUNTY PROPORTION OF POPULATION BY RACE OR ETHNICITY, 2000–2022
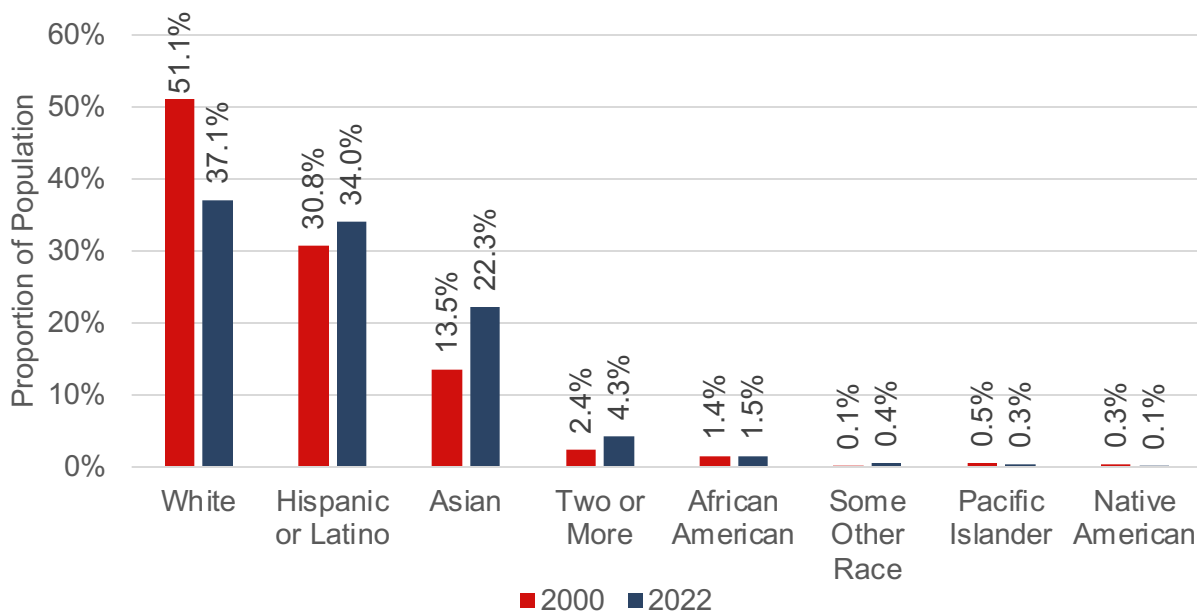
Source: U.S. Census Bureau, American Community Survey

The county's increasingly diverse population has made a significant impact on the county's physical fabric over the past 15 years; for instance, contemporary county landmarks such as Soka University of America, Pao Fa Temple, and the Islamic Center of Irvine have all opened since.

One major factor in this demographic shift is the magnetic pull that Orange County's strong job market, world-class educational system, and famous quality of life exert on immigrants — including students and entrepreneurs — from around the world.

As of 2021, the largest immigrant populations in Orange County included people from the following countries:

- Mexico 294,594
- Vietnam 159,887
- Korea 65,486
- Philippines 53,288

- China* 45,529
- India 34,692
- Iran 28,638
- El Salvador 26,046

- Taiwan 23,002
- Canada 13,519

Note - Foreign-born population from China excludes residents from Hong Kong and Taiwan.

These immigrant communities have made significant contributions to Orange County's culture and economy. Thousands of immigrant entrepreneurs, for instance, have started businesses across Orange County, from local cafes and restaurants to national and even international businesses such as Linksys and Yogurtland. Their presence has greatly increased the county's cultural diversity in multiple ways, from its cuisine to its multilingual media environment to annual cultural events such as the Lunar New Year. While Orange County was once stereotyped as a homogenous Los Angeles suburb, it is the exact opposite of that in 2024.

One final demographic shift worth mentioning is the county's increasing population density. Orange County, according to the 1999 *Community Indicators*, "is also one of the most densely populated areas in the United States. It is 2.5 times denser than Contra Costa and Santa Clara counties and 5 times denser than San Diego County, which has roughly the same population."

25 years later, Orange County's current population density is approximately 4,000 residents per square mile, significantly higher than Los Angeles County (approximately 2,500) and San Diego County (approximately 830). It is, in other words, clearly no longer a bedroom community for Los Angeles — it has become an urban area in its own right. Because of this, Orange County faces many of the same problems as any other urban area, such as high home prices, a lack of available open land for new development, and traffic congestion.

ORANGE COUNTY POPULATION PER SQUARE MILE, 2024	
COUNTY	POPULATION PER SQUARE MILE
Orange	**3,933**
Los Angeles	2,421
San Diego	835
Riverside	339
California (Statewide)	239
San Bernardino	109

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2023. Sacramento, California, May 2024. Esri.

EDUCATION

Education has been an equally essential part of Orange County's thriving economy over the past 25 years. Fortunately, Orange County educational institutions — at both the K-12 and postsecondary levels — have consistently responded to conditions and prepared county students for career success. One key example of this comes from the most challenging stress test the county's educational system faced in recent years, the COVID-19 pandemic. When in-person education ended, seemingly overnight, county educators — from kindergarten teachers to college professors — had to immediately transition to virtual learning.

While they might not be quite as dramatic as a global pandemic, Orange County and its educational system will undoubtedly face significant challenges in the future. The continuing development of AI, for instance, will likely transform skills demand in the labor market. Fortunately, they have clearly already demonstrated major resilience.

Looking at the bigger picture, it becomes clear that the county's educational system has made significant progress over the past 25 years. In 1999, fewer than 40 percent of Orange County's high school graduates were eligible to attend UC/CSU schools, a figure that has increased to 57.4 percent as of 2022/2023. Only 29.6 percent of county residents had a bachelor's degree or higher in 1999, compared to a current figure of 41.2 percent.

ORANGE COUNTY UC/CSU ELIGIBILITY AND EDUCATIONAL ATTAINMENT GROWTH
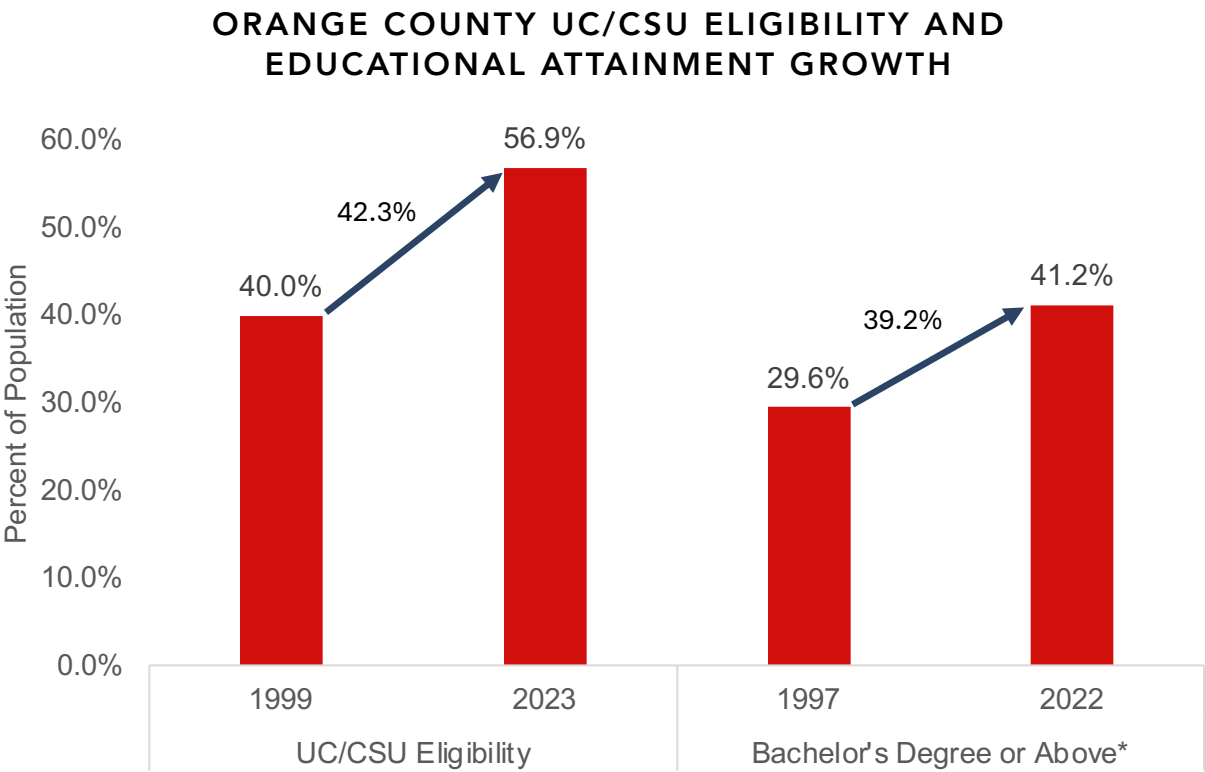
Source: California Department of Education, DataQuest; U.S. Census Bureau, American Community Survey, 1-year estimates.
Includes all residents aged 25 years and older.

This highly educated population remains one of the county's key strengths, one with several significant benefits: a deep talent pool for employers in a variety of industries; employees and business leaders with the specialized knowledge necessary for innovation and the expertise necessary for entrepreneurship.

Between 2003, the earliest year for which degree data is available, and 2023, the total number of degrees granted in Orange County increased from 26,264 to 59,108, an increase of 32,844 degrees or 125 percent. (STEM-related degree conferral will be discussed later in the report.) Despite continued growth from 2003 to 2019, traditional four-year degrees have since begun to slowly decline due in large part to the rapidly increasing cost of attending a four-year college; the average annual tuition increased from $3,349 in 1999 to $27,146, or $108,584 over 4 years, in 2024.[8] As the popularity of four-year colleges has declined, there has been a corresponding increase in the demand for trade schools, as entrants are able to quickly learn, either through training programs or on-the-job training, and start making money, with much less of a monetary or time investment. This has led to a resurgence in trade school attendance and in apprenticeships across the state and county.

TOTAL DEGREES GRANTED IN ORANGE COUNTY, 2003–2023

2003–2023 Change: 32,844
2003–2023 Percent Change: 125%
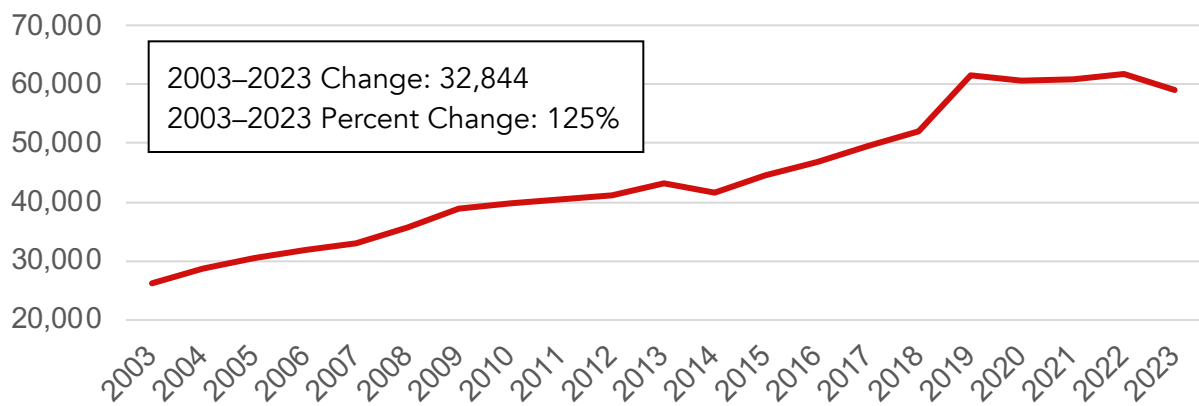
Source: Lightcast

Among Orange County colleges and universities, the University of California, Irvine granted the most degrees in 2023: 11,208, followed by California State University, Fullerton (10,686) and Chapman University (2,850). Despite conferring fewer degrees, Chapman University saw the highest growth in degree conferral between 2003 and 2023 at 165.9 percent.

While the table below does not include degree data for all regional community colleges, the county's top colleges (by total degrees conferred) included Saddleback College with 5,036 degrees in 2023, followed by Golden West College (3,344 degrees) and Irvine Valley College (3,253 degrees). In terms of degree growth since 2003, Coastline Community College leads with 569.7 percent, followed by Irvine Valley College (511.5 percent) and Saddleback College (474.9 percent).

DEGREE CONFERRAL BY FOUR-YEAR UNIVERSITY AND COMMUNITY COLLEGE IN ORANGE COUNTY, 2003–2023*			
SCHOOL	2003	2023	PERCENT CHANGE
Concordia University Irvine	284	1,357	377.8%
Chapman University	1,072	2,850	165.9%
University of California, Irvine	5,351	11,208	109.5%
California State University, Fullerton	6,282	10,686	70.1%
Vanguard University	436	560	28.4%
Coastline Community College	195	1,306	569.7%
Irvine Valley College	532	3,253	511.5%
Saddleback College	876	5,036	474.9%
Golden West College	771	3,344	333.7%
Fullerton College	752	3,101	312.4%
Santiago Canyon College	486	1,643	238.1%
Cypress College	609	1,555	155.3%
Santa Ana College	1,390	2,436	75.3%
Orange Coast College	1,359	2,247	65.3%
West Coast University-Orange County	-	1,527	-

Source: Lightcast
*Includes institutions that conferred 1,000 degrees or more in 2023; does not include online universities or other online academic institutions.

The third and final key factor in the county's strong economic growth over the past 25 years is the county's ability to both attract and retain established, thriving, world-class businesses. As previously mentioned, the county's high levels of educational attainment provide a strong foundation for this. Orange County is currently home to 30 businesses with a net worth of more than $1 billion, including Alteryx, Disney, CoreLogic, Masimo Corporation, Edwards Lifesciences Corporation, Vizio, and Viant Technologies.

THREE OF TOP 10 CALIFORNIA COMMUNITY COLLEGES ARE IN ORANGE COUNTY

ORANGE COUNTY COMMUNITY COLLEGE RANKS, 2024			
COMMUNITY COLLEGE	CITY	STATE RANK	NATIONAL RANK
Irvine Valley College	Irvine	1	6
Saddleback College	Mission Viejo	5	14
Orange Coast College	Costa Mesa	10	50
Golden West College	Huntington Beach	11	52
Coastline Community College	Garden Grove, Westminster, Newport Beach	25	153
Fullerton College	Fullerton	41	274

Source: WalletHub;
https://ktla.com/news/california/here-are-californias-top-77-community-colleges-study/

Six Orange County community colleges appeared near the top of WalletHub's Best and Worst Community Colleges of 2024. This study evaluated 653 community colleges across the nation based on three primary categories: Cost and Financing, Education Outcomes, and Career Outcomes. These three categories aggregate 18 different metrics ranging from cost of in-state tuition & fees and faculty salary to graduation rates and median salaries after attending.

Three Orange County community colleges finished in the top ten for California, with Irvine Valley College in first place. The table above highlights these community colleges with both their state and national ranks.

ECONOMIC GROWTH

According to the 1999 *Orange County Community Indicators,* Orange County had a Gross County Product (the county-level equivalent of GDP, also known as Gross Regional Product) of $102.7 billion in 1997; this number totaled $327 billion in 2023. This is the most obvious indicator of the county's tremendous economic growth over the past quarter-century. Additionally, the county's median household income increased from an inflation-adjusted $90,409 in 1997 to $106,209 as of 2022. Median household income peaked in 2020 before declining due to inflation, the Fed's increased interest rates in response to that inflation, and the general post-COVID economic downturn, all of which ate into wage increases. As inflation falls further in line with the Fed's 2 percent target, inflation-adjusted median household incomes are likely to reverse this trend.

INFLATION-ADJUSTED MEDIAN HOUSEHOLD INCOME IN ORANGE COUNTY, 1997–2022
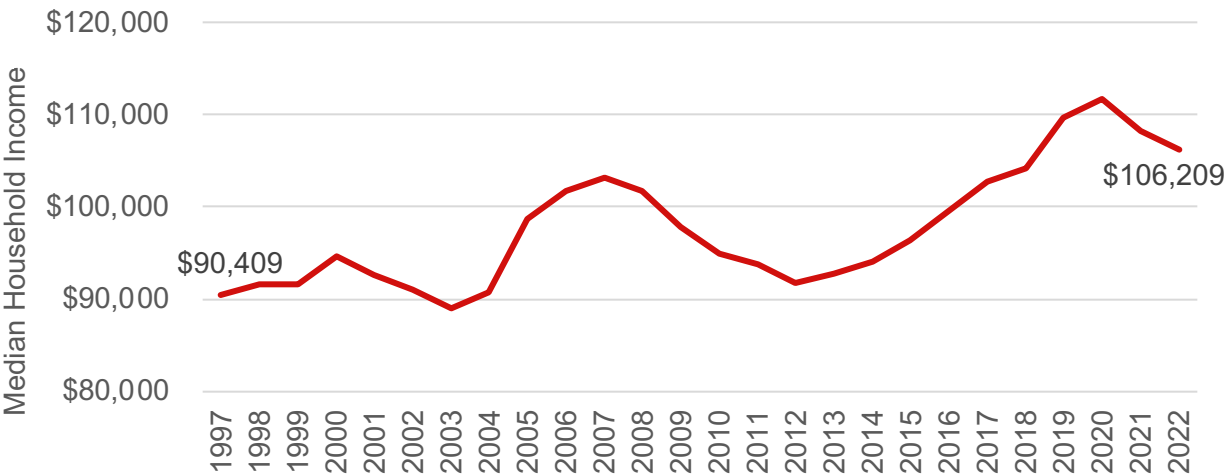
Source: Federal Reserve of St. Louis (FRED); U.S. Census Bureau, American Community Survey, 1-year estimates; U.S. Inflation Calculator.

Since 1999, county employment has increased from 1,423,800 to 1,512,700, an increase of 88,900 jobs or 6.2 percent. The total number of unemployed residents also increased, from 39,400 to 63,600. Overall, Orange County's labor force has expanded from 1,463,200 to 1,576,300, an increase of 7.7 percent. Despite the increase in total unemployed workers, which pushed the unemployed rate from 2.7 percent in 1999 to 4.0 percent in June 2024, the increase in labor force highlights how well the region has been able to attract and retain workers.

The chart below illustrates the strength and resilience of Orange County's labor market, which recovered after spikes of unemployment during the Great Recession and COVID-19 pandemic. The county's innovative industry clusters, well-educated workforce, and other key, long-term strengths fueled these recoveries. Looking forward, increasing the county's supply of affordable housing will be key to long-term economic growth and resilience in the face of future downturns.

ORANGE COUNTY LABOR MARKET OVERVIEW, 1999–2024
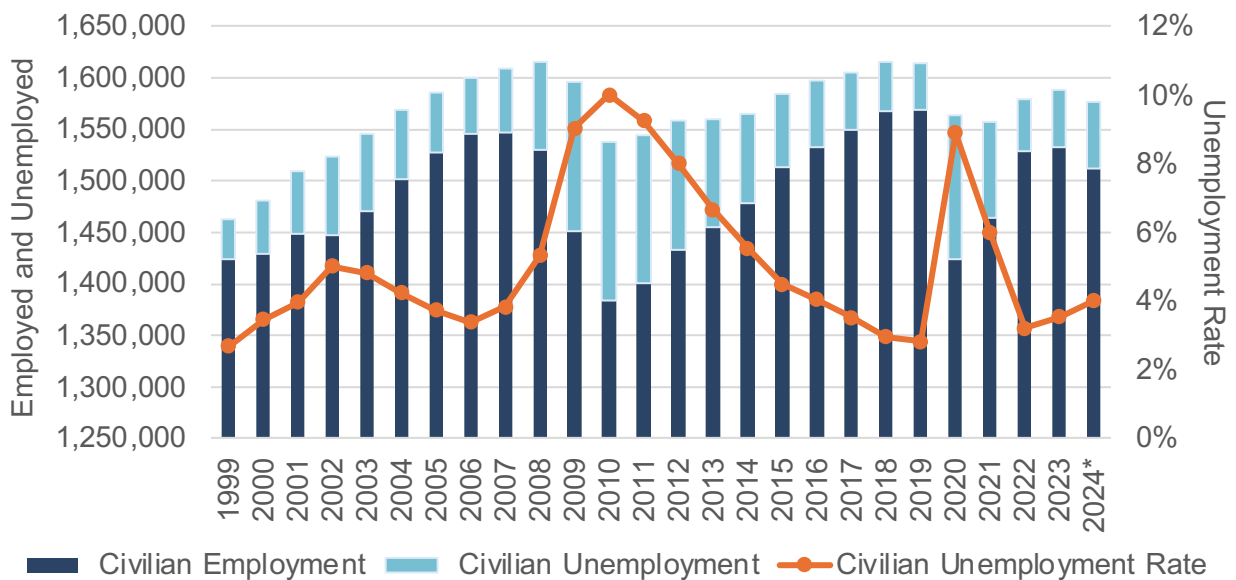
Source: California Employment Development Department
*Data is for June 2024

Orange County's largest industries have seen uneven growth since 1999. Retail Trade, with 144,300 employees in 1999, increased by 1.2 percent by 2024; Durable Goods Manufacturing, which employed 152,300 employees in 1999, shrank by -37.9 percent. At the same time, Health Care and Social Assistance has exploded by 149.6 percent, adding 142,000 employees since 1999 and totaling 236,900 in 2024.

As of 2024, the county's largest industries include Health Care and Social Assistance with 236,900 jobs, followed by Accommodation and Food Services with 178,000 jobs and Retail Trade at 146,000. Over the past quarter century, these industries have grown by 149.6 percent, 63.2 percent, and 1.2 percent, respectively. Other industries with more than 50 percent growth included Private Educational Services; Arts, Entertainment, and Recreation; and Professional, Scientific, and Technical Services.

ORANGE COUNTY LABOR FORCE AND INDUSTRY EMPLOYMENT OVERVIEW, 1999–2024				
	1999	2024	CHANGE	PERCENT CHANGE
Civilian Labor Force	1,463,200	1,576,300	113,100	7.7%
Civilian Employment	1,423,800	1,512,700	88,900	6.2%
Civilian Unemployment	39,400	63,600	24,200	61.4%
Civilian Unemployment Rate	2.7%	4.0%	-	-
Total Nonfarm	1,351,300	1,708,800	357,500	26.5%
Mining and Logging	700	300	(400)	-57.1%
Construction	72,500	106,100	33,600	46.3%
Durable Goods	152,300	115,300	(37,000)	-24.3%
Non-Durable Goods	62,200	38,600	(23,600)	-37.9%
Wholesale Trade	80,500	81,900	1,400	1.7%
Retail Trade	144,300	146,000	1,700	1.2%
Transportation, Warehousing, and Utilities	28,600	35,000	6,400	22.4%
Information	36,900	21,500	(15,400)	-41.7%
Finance and Insurance	70,300	62,400	(7,900)	-11.2%
Real Estate and Rental and Leasing	30,800	41,500	10,700	34.7%
Professional, Scientific, Technical Services	**88,200**	**141,400**	**53,200**	**60.3%**
Management of Companies and Enterprises	37,300	37,800	500	1.3%
Administrative, Support, Waste Remediation	112,700	142,400	29,700	26.4%
Private Educational Services	**17,100**	**39,300**	**22,200**	**129.8%**
Health Care and Social Assistance	**94,900**	**236,900**	**142,000**	**149.6%**
Arts, Entertainment, and Recreation	**29,000**	**60,400**	**31,400**	**108.3%**
Accommodation and Food Services	**109,100**	**178,000**	**68,900**	**63.2%**
Other Services	43,000	57,700	14,700	34.2%
Government	141,100	166,300	25,200	17.9%

Source: California Employment Development Department

Entrepreneurship has been an essential part of this story. Key Orange County stakeholders have recognized the importance of entrepreneurship and created incubators and other resources for the county's young entrepreneurs. In 2014, for instance, UCI's Beall Applied Innovation opened The Cove, an incubator located in the University Research Park. Five years later, Beall Applied Innovation and the Beall Family Foundation created University Lab Partners: a nonprofit incubator, accelerator, and lab space.

VENTURE CAPITAL

One illustration of Orange County's strong entrepreneurial ecosystem is venture capital investment, which totaled $38.3 million in 2023, a significant increase over the previous year. As seen below, county venture capital funding peaked in 2015 at over $85 million. Orange County is home to several venture and angel investors including TCA Venture Group, Cove Fund, and Tech Coast Angels.

ORANGE COUNTY VENTURE CAPITAL INVESTMENTS, 1998–2023
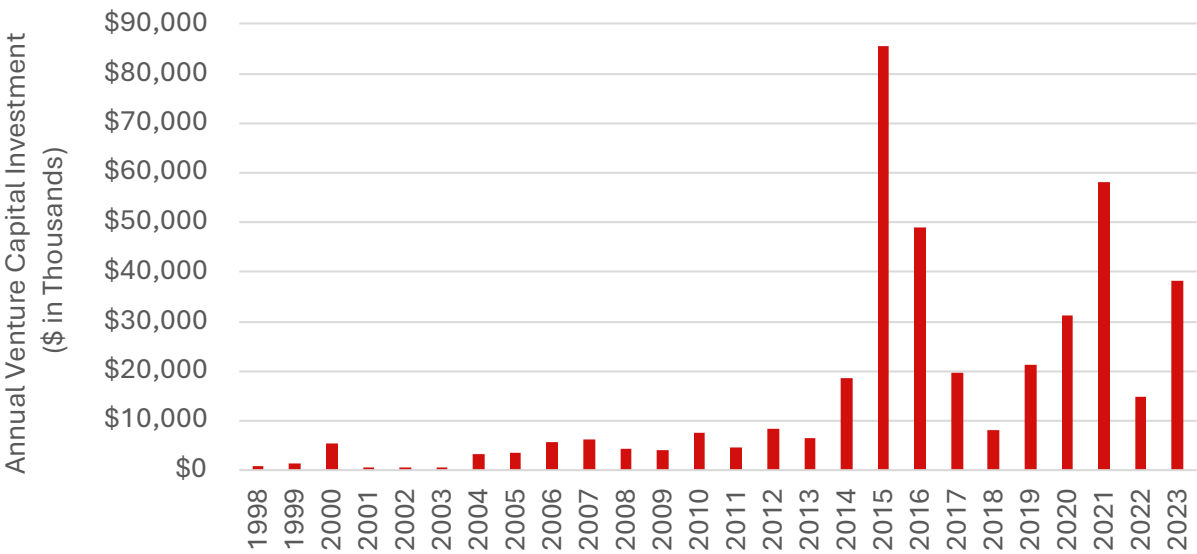
Source: Pitchbook

A look at funding targets over the past 25 years shows that the verticals with largest investment shifted from TMT, Mobile, and Manufacturing in 1998 to Mobility Tech, Clean Tech, and Climate Tech in 2023. This shift, as seen below, reflects wider shifts in the American economy. In 1999, manufacturing and fossil fuels ruled the landscape. In 2023, transportation and climate change-related technologies saw the largest investments.

TOP 5 VERTICALS BY VENTURE CAPITAL INVESTMENTS, 1998 AND 2023			
	1998 ($ IN 000s)		2023 ($ IN 000s)
Tech, Media, Telecom (TMT)	$2,510	Mobility Tech	$17,550
Mobile	$1,760	Clean Tech	$17,140
Manufacturing	$516	Climate Tech	$16,970
Oil & Gas	$139	Industrials	$16,570
Industrials	$68	Autonomous Cars	$16,520

Source: Pitchbook

ORANGE COUNTY CITIES

Individual Orange County cities have seen significant transformations since 1999. Three new cities, for instance, were incorporated between 1999 and 2001: Laguna Woods, Rancho Santa Margarita, and Aliso Viejo.

While the total population has grown from 2.78 million to 3.15 million from 1999 to 2024, an increase of just under 375,000 or 13 percent, total housing units have increased by 203,197 units or by 21 percent. This growth has been driven in large part by the city of Irvine, a master-planned community which has attracted a lion's share of families and workers due to its strong economy, quality of life, and famously safe environment. Irvine has consistently ranked 3rd in WalletHub's annual Best Places to Raise a Family ranking, taking 1st place in Health & Safety and 2nd in Education & Child Care in the most recent report.

Irvine's population has more than doubled over the past 25 years; it grew from 133,945 in 1999 to 314,550 in 2024. This is by far the fastest and most significant growth of any Orange County city. Other Orange County cities with significant population growth over the past 25 years include:

- Lake Forest (+28,925 or 50 percent);
- Brea (+12,958 or 37 percent);
- San Clemente (+13,724 or 28 percent);
- Newport Beach (+14,654 or 22 percent); and
- Tustin (+12,319 or 19 percent).

Some Orange County cities saw population decline over that same period, including:

- Santa Ana (-20,526 or -6 percent);
- Dana Point (-1,996 or -6 percent);
- Laguna Beach (-997 or -4 percent);
- La Palma (-273 or -2 percent); and
- Villa Park (-173 or -3 percent).

HOUSING

Of the 203,197 housing units built in Orange County between 1999 and 2024, approximately 75,983 of those units (37.4 percent of the total) were in Irvine. The total number of Irvine housing units increased from 50,541 in 1999 to 126,524 in 2024, a growth rate of 150 percent compared to just 21 percent for the county as a whole. Other cities with significant gains in housing supply included Lake Forest (+56 percent), Brea (+42 percent), and San Clemente (+32 percent).

The considerable demand to live and work in Orange County pushed the county's median home price from $282,648 in June 1999 to $1,450,000 as of June 2024, an increase of 413 percent, which is more than in any peer region. (California as a whole saw a 301 percent increase in home prices.)

While Orange County has the highest median home prices in Southern California, these prices remain well below median prices in more northern counties including San Francisco ($1,650,000) and Santa Clara ($1,955,000). As the demand to both live and work in Orange County remains strong, housing supply has failed to keep pace, which, when combined with recent increases in interest rates, pushes home prices to new highs and affordability to new lows.

ORANGE COUNTY AND PEER REGIONS MEDIAN HOME SALES PRICE, 1999–2024
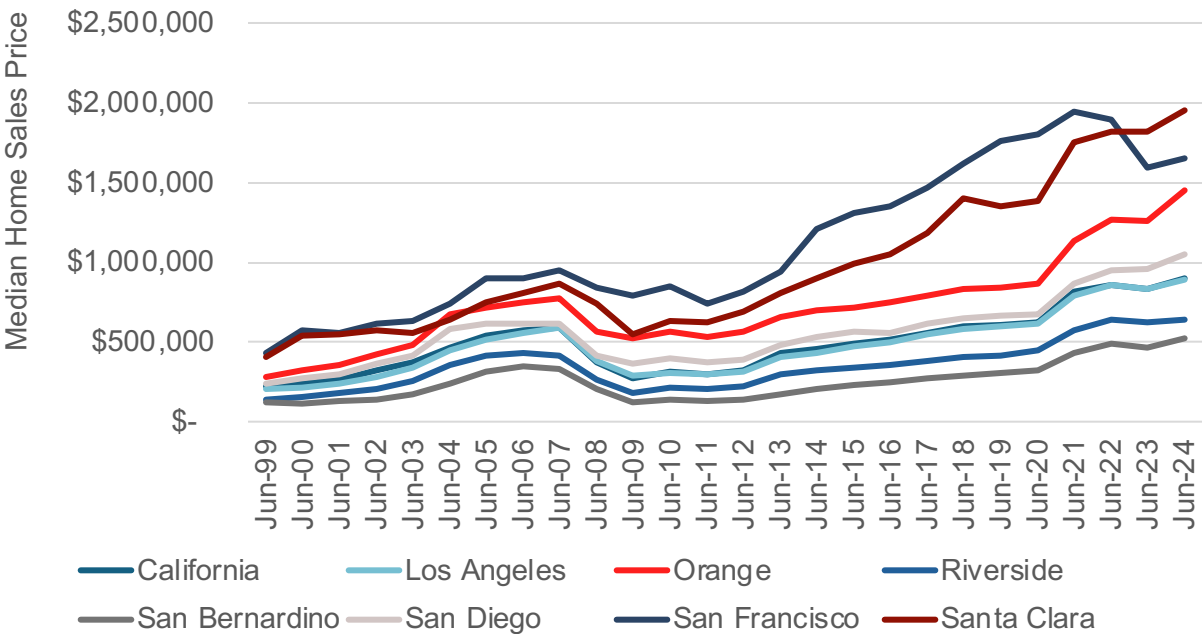
Source: California Association of Realtors

ORANGE COUNTY AND PEER REGION MEDIAN HOME SALES PRICE PERCENT CHANGE, 1999–2024

Percent Change

Region	Percent Change
San Francisco	282%
California	301%
Los Angeles	335%
San Bernardino	338%
San Diego	344%
Riverside	364%
Santa Clara	377%
Orange	413%
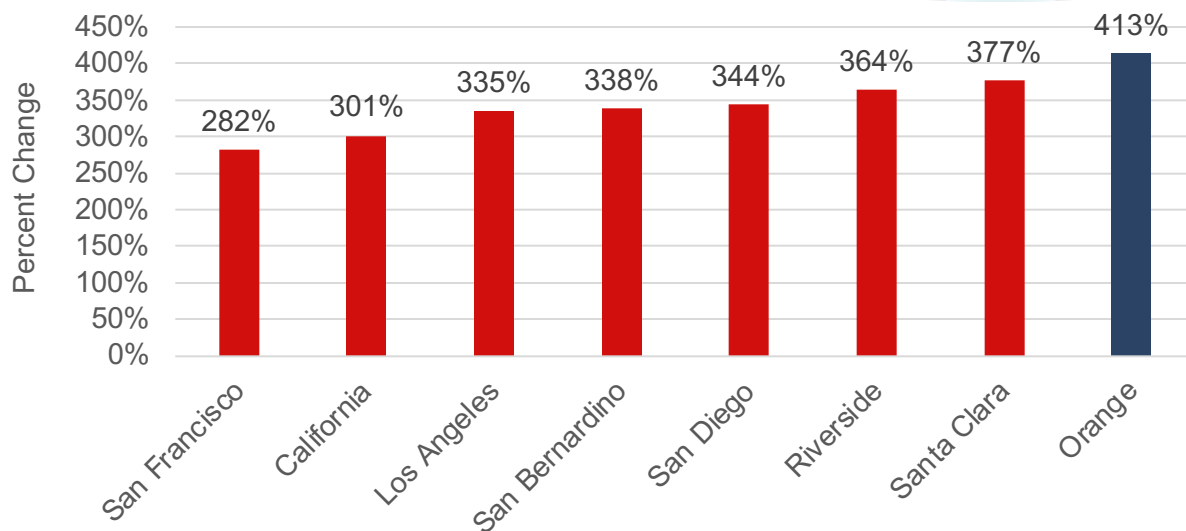
Source: California Association of Realtors

As of June 2024, Orange County's most expensive housing markets are Newport Beach (average home price of $3.4 million), Laguna Beach ($3.0 million), and Villa Park ($2.3 million). As seen below, cities with the largest price increases over the past 25 years included Stanton (+386 percent), San Clemente (+382 percent), and Santa Ana (+373 percent). While the rapidly rising home values indicates strong demand to live in Orange County, declining affordability has led to population declines in the post-pandemic era. While 2024 reversed these declines, as discussed elsewhere in this report, high housing prices and their consequences — especially the pricing out of young talent and workers — remain major concerns.

ZILLOW HOME VALUE INDEX FOR ORANGE COUNTY CITIES, 2000–2024			
	HOME VALUES		
	JUNE 2000	JUNE 2024	PERCENT CHANGE
Stanton	$157,639	$766,791	386.4%
San Clemente	$350,417	$1,690,221	382.3%
Santa Ana	$174,852	$827,134	373.0%
Garden Grove	$204,464	$959,824	369.4%
Irvine	$331,151	$1,540,620	365.2%
Costa Mesa	$287,221	$1,326,946	362.0%
Newport Beach	$732,491	$3,368,078	359.8%
Dana Point	$357,948	$1,644,802	359.5%
Fountain Valley	$294,778	$1,342,120	355.3%
Tustin	$255,706	$1,138,156	345.1%
Lake Forest	$269,238	$1,195,117	343.9%
Los Alamitos	$353,704	$1,556,343	340.0%
Laguna Niguel	$335,429	$1,443,838	330.4%
La Palma	$272,424	$1,172,254	330.3%
Buena Park	$214,030	$919,320	329.5%
La Habra	$204,010	$872,373	327.6%
Laguna Hills	$284,033	$1,209,895	326.0%
Placentia	$254,601	$1,074,721	322.1%
Laguna Beach	$705,093	$2,969,104	321.1%
Rancho Santa Margarita	$244,741	$1,025,656	319.1%
San Juan Capistrano	$305,516	$1,273,798	316.9%
North Tustin	$412,926	$1,721,317	316.9%
Mission Viejo	$288,915	$1,200,731	315.6%
Anaheim	$221,864	$919,781	314.6%
Westminster	$253,973	$1,052,688	314.5%
Huntington Beach	$318,333	$1,310,448	311.7%
Orange	$268,522	$1,100,987	310.0%
Cypress	$258,486	$1,048,227	305.5%
Aliso Viejo	$252,148	$988,387	292.0%
Fullerton	$259,333	$1,015,963	291.8%
Yorba Linda	$355,625	$1,375,552	286.8%
Brea	$288,362	$1,105,421	283.3%
Seal Beach	$237,815	$898,865	278.0%
Silverado	$260,697	$981,924	276.7%
Villa Park	$723,933	$2,288,739	216.2%
Laguna Woods	N/A	$447,372	N/A

Source: Zillow Research, Zillow Home Value Index (ZHVI)

LOOKING FORWARD

Orange County's next 25 years could see a transformation as profound as in the past 25 years — an era of demographic change, entrepreneurship, economic growth and resilience in the face of global and local challenges. Some long-term trends over the past few decades will likely continue, such as the county's aging population.

Orange County's population is expected to increase by 3.1 percent (approximately 97,631 residents) by 2049. Among its neighbors, Riverside, San Bernardino, and San Diego counties are expected to see the largest population growth while Ventura and Los Angeles counties are expected to see population declines. A lack of affordability in coastal areas will continue to push residents toward more affordable inland regions, fueling population growth — and economic growth — in the Inland Empire. Orange County's lack of housing is a primary concern, likely to cause slower population growth over the next few decades.

PROJECTED POPULATION CHANGE BY COUNTY IN SOUTHERN CALIFORNIA, 2024–2049
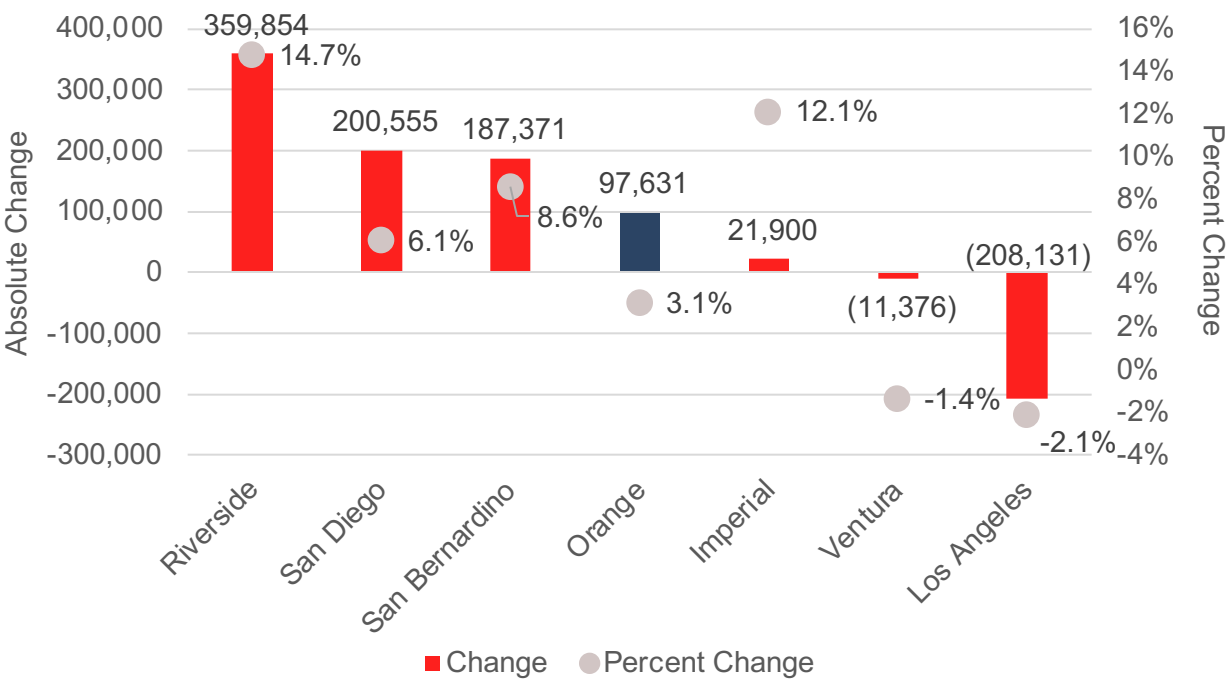
California Department of Finance. Demographic Research Unit. Report P-2A: Total Population Projections, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

As discussed elsewhere in this report, Orange County's population will grow increasingly older over the next 25 years.

As seen below, the 65+ age group is the only age group in Orange County that's expected to increase, jumping by 66.4 percent or by 359,464 residents. At the same time, the three youngest age groups are expected to see large declines led by the 6–17 age group which is expected to decline by 138,055 residents or by 29.9 percent.

PROJECTED CHANGE BY AGE GROUP IN ORANGE COUNTY, 2024–2049		
AGE GROUP	2024–2049 CHANGE	2024–2049 PERCENT CHANGE
0-5 Years	-29,834	-15.8%
6-17 Years	-138,055	-29.9%
18-24 Years	-56,444	-18.2%
25-44 Years	-11,488	-1.4%
45-64 Years	-26,012	-3.2%
65+ Years	359,464	66.4%
Total	97,631	3.1%

Source: California Department of Finance. Demographic Research Unit. Report P-2B: Total Population Projections by Single Year of Age, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

The following chart illustrates the projected change in age groups as a proportion of the county's population. The 65+ age group, which currently represents 17.2 percent of the county population, is the only group expected to increase as a proportion of the county's total population; all other age groups are expected to decline, as seen below.

PROPORTION OF POPULATION BY AGE GROUP IN ORANGE COUNTY, 2024–2049
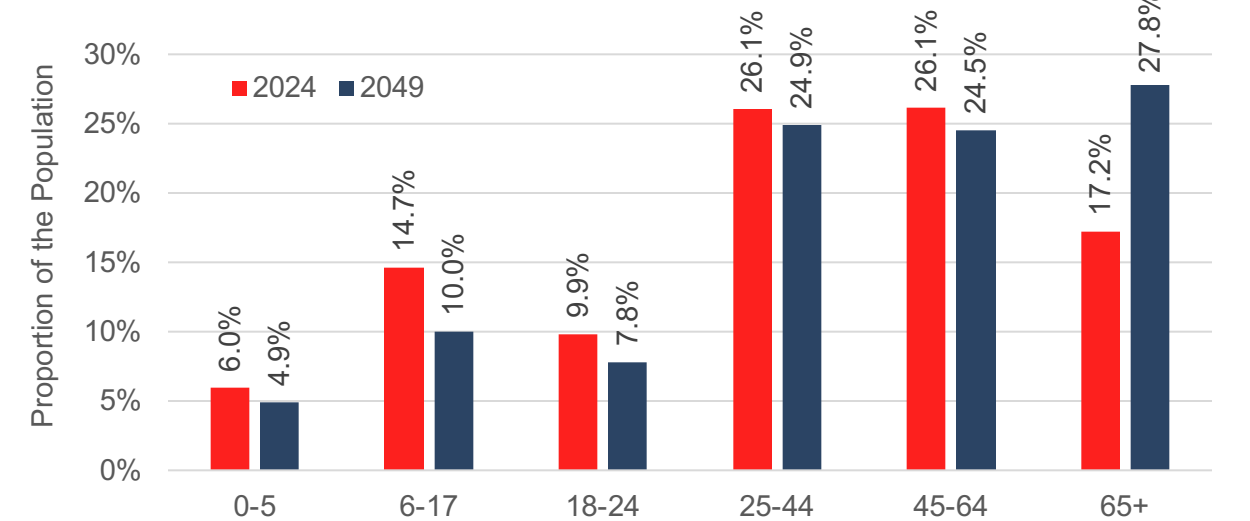
Source: California Department of Finance. Demographic Research Unit. Report P-2B: Total Population Projections by Single Year of Age, California Counties, 2020-2070 (Baseline 2023 Population Projections; Vintage 2024 Release). Sacramento, California, September 2024.

If not properly addressed through outreach efforts aimed at attracting and retaining young families or professionals, this increasing unsustainable dependency ratio could seriously affect the health of Orange County's labor market and overall economy. For one, it would mean even more reliance on out-of-county workers commuting into Orange County and spending their wages outside of it. An aging population would also necessitate further investment in Healthcare and related Social Assistance industries, and impact K-12 and higher education enrollment.

When it comes to housing, Orange County is expected to add 95,575 units by 2050, representing an increase of 8.3 percent over 2024 totals. This is ahead of other Southern California counties like Ventura and Imperial but well behind Los Angeles, Riverside, and San Bernardino counties. As seen below, Orange County is expected to see the second-lowest percentage growth in the region, a problem for a county already facing a chronic housing shortage.
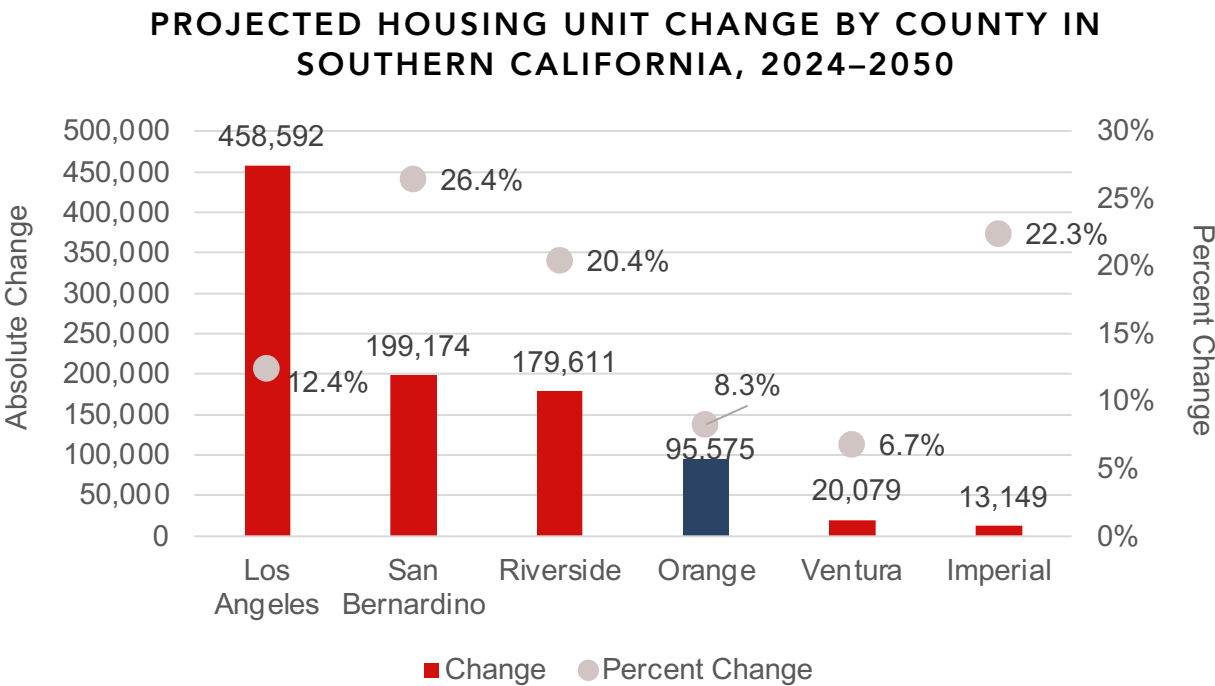
PROJECTED HOUSING UNIT CHANGE BY COUNTY IN SOUTHERN CALIFORNIA, 2024–2050

Source: Southern California Association of Governments; Demographic and Growth Forecast Technical Report

Among Orange County cities, Anaheim is expected to add the most housing units between 2024 and 2050, 17,028, followed by Costa Mesa (10,080 housing units) and Fullerton (9,596 housing units). The largest percentage growth is expected to occur in Fountain Valley (27.2 percent), Costa Mesa (22.7 percent), and Buena Park (21.2 percent).

One likely trend for increasing Orange County's housing supply is the creation of new mixed-use development and/or the conversion of formerly retail-only centers into mixed-use developments. Recent examples include OCVIBE in Anaheim, a 95-acre project including 1,500 apartments, 2 hotels, 35 restaurants, and 1.2 million square feet of office space located next to the Honda Center[9] which will come online in the next few years and help to attract young workers and families. Housing demand in Orange County will likely continue to outpace supply, keeping prices high.

[9] https://www.anaheim.net/DocumentCenter/View/32441/OCVibe-Fact-Sheet

TOP 20 CITIES BY PROJECTED HOUSING UNITS GROWTH IN ORANGE COUNTY, 2024–2050

City	Housing Unit Change
Anaheim	17,028
Costa Mesa	10,080
Fullerton	9,596
Irvine	8,476
Garden Grove	7,728
Buena Park	5,501
Santa Ana	5,439
Fountain Valley	5,439
Tustin	5,351
Cypress	3,212
Placentia	2,873
Orange	2,135
San Juan Capistrano	1,642
Laguna Hills	1,566
La Habra	1,304
Yorba Linda	1,299
Brea	1,189
Stanton	1,008
Westminster	880
Los Alamitos	548

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2024. Sacramento, California, May 2024; Southern California Association of Governments; Demographic and Growth Forecast Technical Report.
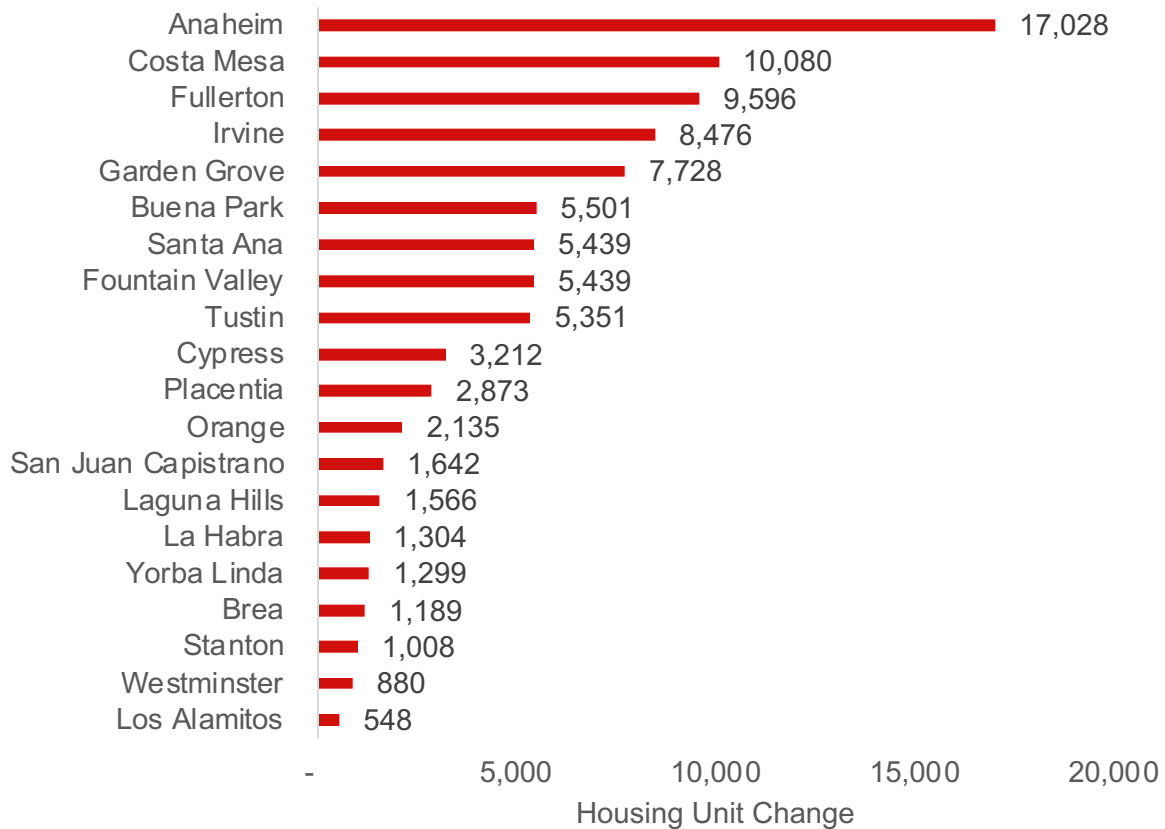
Orange County is expected to add the second highest number of workers in Southern California (308,500), behind only Los Angeles County. While Orange County ranks 4th in absolute population and housing unit growth in Southern California, it ranks 2nd in absolute employment growth, a reflection of its labor market's long-term strength.

PROJECTED EMPLOYMENT CHANGE BY COUNTY IN SOUTHERN CALIFORNIA, 2024–2050
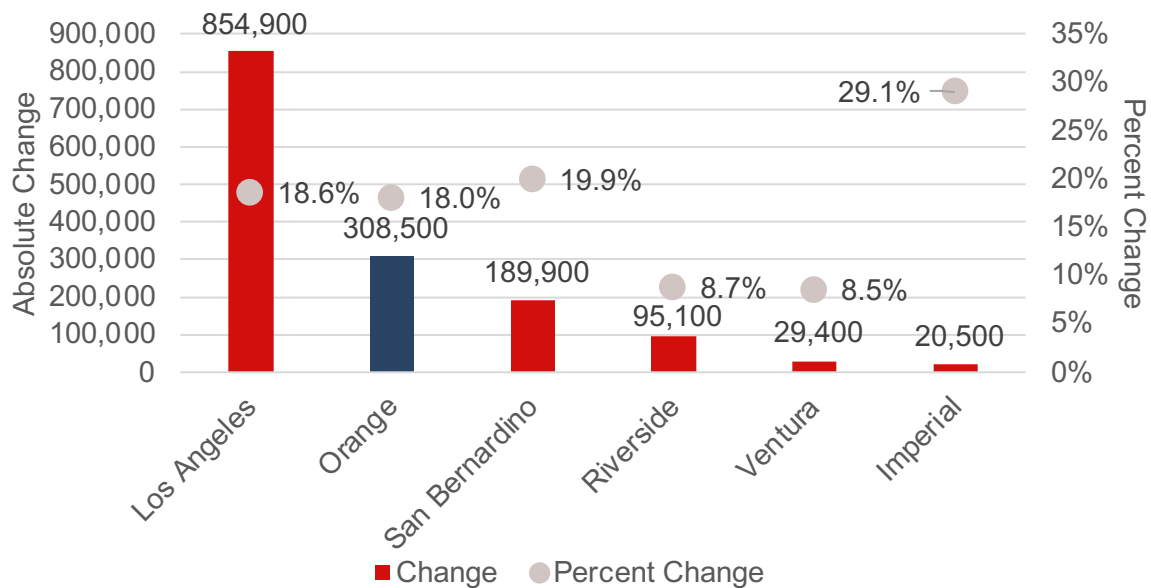
Source: Southern California Association of Governments; Demographic and Growth Forecast Technical Report

OCCUPATIONAL EMPLOYMENT PROJECTIONS

Orange County's economy will evolve over the next 25 years alongside its demographics, especially its aging population, and alongside new technologies such as AI and machine learning. These technologies will both replace some jobs — service, blue- and white-collar — and fuel the creation of new jobs. Fortunately, Orange County's world-class employers, strong industry clusters, and highly educated population will provide strong foundations during this changing time.

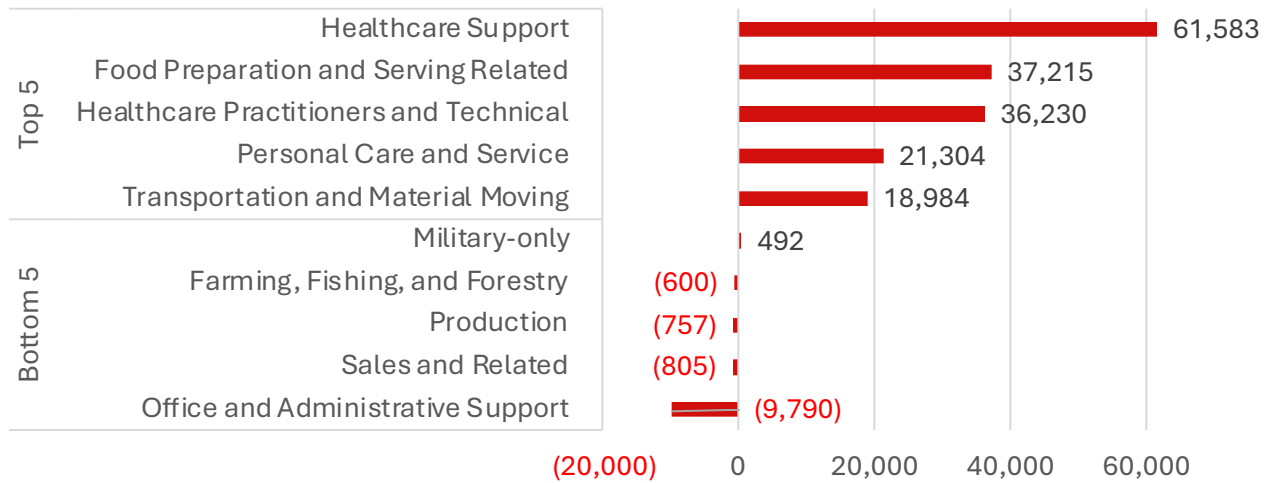In Orange County, Healthcare Support occupations are expected to see the highest absolute and percent growth between 2024 and 2049; they are expected to add 61,583 jobs, a 60.3 percent increase. Food Preparation and Serving Related occupations, Healthcare Practitioners and Technical occupations, and Community and Social Service occupations (such as barbers, hairstylists, manicurists, and massage therapists) are also expected to see significant growth by 2049, as seen in the chart below. While many of these jobs are relatively low-paying and often entry-level, they do all involve customer service skills, skills which will likely prove defensible to automation in the foreseeable future.

At the occupational group level, automation is expected to have the largest impact on Office and Administrative Support, which is expected to lose 9,790 jobs, 4.6 percent of its current total. While the threat of automation is generally associated with blue-collar jobs, it has already begun to affect white-collar jobs as well, and this trend will likely continue. In terms of percentage decrease, as seen in chart on next page, Farming, Fishing, and Forestry is expected to see the largest decline over the next 25 years.

TOP AND BOTTOM 5 OCCUPATIONAL GROUPS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT ABSOLUTE GROWTH, 2024–2049

	Occupational Group	Value
Top 5	Healthcare Support	61,583
	Food Preparation and Serving Related	37,215
	Healthcare Practitioners and Technical	36,230
	Personal Care and Service	21,304
	Transportation and Material Moving	18,984
Bottom 5	Military-only	492
	Farming, Fishing, and Forestry	(600)
	Production	(757)
	Sales and Related	(805)
	Office and Administrative Support	(9,790)

Source: Lightcast, OCBC projections

TOP AND BOTTOM 5 OCCUPATIONAL GROUPS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT PERCENT GROWTH, 2024–2049

	Occupational Group	Value
Top 5	Healthcare Support	60.3%
	Healthcare Practitioners and Technical	37.7%
	Community and Social Service	34.2%
	Personal Care and Service	32.0%
	Protective Service	30.3%
Bottom 5	Business and Financial Operations	5.5%
	Sales and Related	-0.5%
	Production	-0.8%
	Office and Administrative Support	-4.6%
	Farming, Fishing, and Forestry	-26.2%
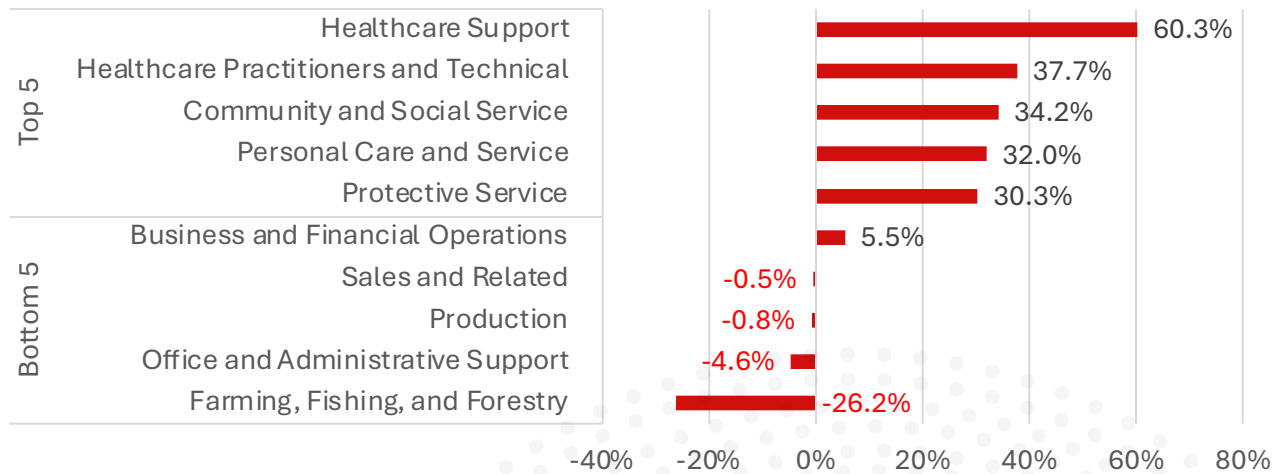
Source: Lightcast, OCBC projections

When looking at the projected growth of specific occupations, Orange County's unique trends become even more clear. Due to the county's aging population, Home Health and Personal Care Aides are expected to see the largest occupational growth, adding 46,131 jobs, an increase of 76.5 percent. In fact, 5 of the 15 fastest growing occupations fall under this category, including Registered Nurses (+10,201 jobs), Medical Assistants (+4,505 jobs), Nursing Assistants (+4,306 jobs), and Medical and Health Services Managers (+4,124 jobs).

Orange County's Tourism sector is also projected to expand. One major factor will be the $1.9 billion Disneyland Forward project, which is expected to add 8,960 new construction jobs during development and 4,584 new jobs for operations, with significant contributions to affordable housing projects ($30 million), park improvements outside of the resort area ($8 million), and traffic flow and pedestrian safety ($85 million).[10] Alongside Disneyland, Orange County's luxury retail destinations, world-renown coastline and shore break, and cultural landmarks will continue to attract visitors from across the country and globe. This is reflected in the expected growth of Fast Food and Counter Workers, Cooks, and Amusement and Recreation Attendants.

Alongside Healthcare and Tourism, new technologies will drive employment growth for Orange County Software Developers; this category is projected to add 5,973 workers from 2024 to 2049, an increase of 30.7 percent. The growing adoption of AI chatbots and other AIs will increase the demand for software developers and IT workers to support the implementation and adoption of these technologies. While AI and automation stand to replace a broad number of occupations, it also stands to create new, sometimes more technical and lucrative positions. Adapting to these changes should be a crucial priority for Orange County educators and policymakers.

TOP 15 OCCUPATIONS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT ABSOLUTE CHANGE, 2024–2049				
DESCRIPTION	2024 JOBS	2049 JOBS	CHANGE	PERCENT CHANGE
Home Health and Personal Care Aides	60,282	106,413	46,131	76.5%
Fast Food and Counter Workers	43,860	56,044	12,184	27.8%
Registered Nurses	29,668	39,870	10,202	34.4%
Cooks, Restaurant	16,057	25,792	9,735	60.6%
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	31,956	39,112	7,156	22.4%
Software Developers	19,446	25,419	5,973	30.7%
Security Guards	16,175	21,143	4,968	30.7%
Amusement and Recreation Attendants	15,320	20,020	4,700	30.7%
General and Operations Managers	28,051	32,732	4,681	16.7%
Stockers and Order Fillers	24,919	29,486	4,567	18.3%
Medical Assistants	9,963	14,469	4,506	45.2%
Nursing Assistants	10,053	14,359	4,306	42.8%
First-Line Supervisors of Food Preparation and Serving Workers	11,863	16,028	4,165	35.1%
Medical and Health Services Managers	5,197	9,321	4,124	79.3%
Maids and Housekeeping Cleaners	18,088	22,162	4,074	22.5%

Source: Lightcast, OCBC projections

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[10] https://www.forbes.com/sites/megandubois/2024/05/20/disneylandforward-approved-by-city-of-anaheim-launches-disney-into-next-chapter/

In another illustration of AI impacts, Secretaries and Administrative Assistants are expected to see the most significant employment decline over the next quarter century, falling by 2,556 jobs or by 12.9 percent, followed by Loan Officers (-2,457 jobs) and Securities Sales Agents (-2,130 jobs). Overall, nearly all the occupations expected to see the largest actual drop in jobs are clerks, sales representatives, or assistants. These occupations have a high degree of administrative tasks, repetitive functions, or established guidelines and processes which can be easily replaced by automated software applications.

BOTTOM 15 OCCUPATIONS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT ABSOLUTE CHANGE, 2024–2049				
DESCRIPTION	2024 JOBS	2049 JOBS	CHANGE	PERCENT CHANGE
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	19,794	17,238	(2,556)	-12.9%
Loan Officers	4,436	1,979	(2,457)	-55.4%
Securities, Commodities, and Financial Services Sales Agents	7,313	5,184	(2,130)	-29.1%
Shipping, Receiving, and Inventory Clerks	10,842	9,034	(1,808)	-16.7%
Office Clerks, General	31,482	29,797	(1,684)	-5.4%
Executive Secretaries and Executive Administrative Assistants	5,353	3,720	(1,633)	-30.5%
Cooks, Fast Food	17,905	16,335	(1,571)	-8.8%
Tellers	2,440	891	(1,548)	-63.5%
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	17,804	16,370	(1,434)	-8.1%
Customer Service Representatives	22,868	21,456	(1,412)	-6.2%
Loan Interviewers and Clerks	2,433	1,071	(1,363)	-56.0%
Claims Adjusters, Examiners, and Investigators	2,810	1,656	(1,154)	-41.1%
Bookkeeping, Accounting, and Auditing Clerks	19,648	18,589	(1,058)	-5.4%
Cashiers	34,462	33,421	(1,042)	-3.0%
Sewing Machine Operators	2,484	1,533	(951)	-38.3%

Source: Lightcast, OCBC projections

On a percentage basis, Orange County's most concentrated industry clusters and emerging sectors will fuel employment growth over the next 25 years. While 3 of the top 5 projected fastest growing occupations deal in nuclear power, they are potentially related to the closing and mitigation activities at the San Onofre Nuclear Generating Station in San Clemente. Nine of the 15 fasting growing occupations are in Healthcare, including Nurse Practitioners (expected growth of 123.3 percent), Surgical Assistants (+90.8 percent), and Orthotists and Prosthetists (+87.7 percent). The expected growth of Orthotists and Prosthetists also serves to highlight the region's concentration and specialization of medical devices, of which Orange County has long been a nationwide industry leader.

TOP 15 OCCUPATIONS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT PERCENT CHANGE, 2024–2049				
DESCRIPTION	2024 JOBS	2049 JOBS	CHANGE	PERCENT CHANGE
Nuclear Engineers	55	171	117	212.3%
Nurse Practitioners	2,358	5,266	2,908	123.3%
Nuclear Technicians	89	192	103	115.6%
Nuclear Power Reactor Operators	165	318	153	92.8%
Surgical Assistants	54	103	49	90.8%
Orthotists and Prosthetists	193	362	169	87.7%
Veterinary Technologists and Technicians	1,090	2,036	946	86.7%
Physician Assistants	1,058	1,955	896	84.7%
Paramedics	505	928	423	83.8%
Medical and Health Services Managers	5,197	9,321	4,124	79.3%
Home Health and Personal Care Aides	60,282	106,413	46,131	76.5%
Solar Photovoltaic Installers	391	684	293	75.0%
Animal Breeders	11	20	8	74.9%
Psychiatric Technicians	777	1,351	574	73.8%
Genetic Counselors	24	42	18	71.9%

Source: Lightcast, OCBC projections

Occupations expected to see the highest degree of decline between 2024 and 2049 were a mix of farm-related occupations and occupations under threat from AI. Orange County farm industry employment has seen consistent declines over the past several decades, falling from 7,000 in 1999 to 1,700 as of June 2024. This trend is expected to continue with Farmers shrinking by 70.0 percent and Agricultural Workers falling by 54.4 percent.

Following trends highlighted above, many white-collar occupations with repetitive tasks or highly structured processes are under threat from AI chatbots and automation. Tellers are expected to shed 1,548 jobs, a decline of 63.5 percent, Loan Interviewers by 56.0 percent, and Loan Officers by 55.4 percent. Due to the structured process of mortgage applications and underwriting standards, the application of AI allows nearly all tasks to be automated, requiring little, if any, human interaction. Because of this, this sector and others like it could see significant impacts due to AI. While AI may not be able to easily replace valuable customer-agent interactions or relationships, it stands to significantly improve efficiency and reduce the necessary head counts.[11]

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[11] https://www.forbes.com/sites/forbesfinancecouncil/2023/03/09/the-future-of-mortgage-lending-how-ai-and-humans-can-coexist/#:~:text=The%20Lending%20Process%20Will%20Still%20Need%20Humans&text=However%2C%20the%20human%20touch%2C%20rapport,strong%20relationships%20with%20their%20customers.

BOTTOM 15 OCCUPATIONS IN ORANGE COUNTY BY PROJECTED EMPLOYMENT PERCENT CHANGE, 2024–2049				
DESCRIPTION	2024 JOBS	2049 JOBS	CHANGE	PERCENT CHANGE
Farmers, Ranchers, and Other Agricultural Managers	378	113	(265)	-70.0%
Tellers	2,440	891	(1,548)	-63.5%
Slaughterers and Meat Packers	118	47	(71)	-60.4%
Loan Interviewers and Clerks	2,433	1,071	(1,363)	-56.0%
Textile Bleaching and Dyeing Machine Operators and Tenders	163	72	(91)	-55.7%
Loan Officers	4,436	1,979	(2,457)	-55.4%
Agricultural Workers, All Other	122	56	(66)	-54.4%
New Accounts Clerks	113	54	(59)	-52.1%
Word Processors and Typists	1,405	684	(720)	-51.3%
Tire Builders	135	68	(66)	-49.3%
Sewers, Hand	75	38	(37)	-49.0%
Agents and Business Managers of Artists, Performers, and Athletes	220	116	(104)	-47.3%
Textile Knitting and Weaving Machine Setters, Operators, and Tenders	181	97	(84)	-46.3%
Watch and Clock Repairers	58	33	(26)	-44.0%
Pressers, Textile, Garment, and Related Materials	482	272	(210)	-43.6%

Source: Lightcast, OCBC projections

Overall, while new and emerging technologies will continue to shift and disrupt many industries and occupations, long-established demographic trends and industry specializations will serve to guide projected industry and occupational employment trends over the next 25 years.

MEDIA IN ORANGE COUNTY, 1999–2024

Orange County was home to a truly diverse media landscape back in 1999, with print and broadcast media in not just English and Spanish, but also in Vietnamese, Farsi, and Korean. As an example, the county remains the largest Vietnamese population outside of Vietnam, making Orange County home to multiple Vietnamese-language newspapers and radio stations, as well as Little Saigon TV. In newspapers, the rivalry between long-running publications *The Orange County Register* and *Los Angeles Times* (with its Times Orange County Edition) spiked in the 1990s. As the industry changed with significant declines in print subscriptions, internet-based news outlets gained traction and readership. Today, with the *Los Angeles Times* dropping their Times Orange County Edition, *The Orange County Register* remains the largest county-based news outlet. Non-English language media outlets continue to publish in print and digitally which reflects the cultural diversity in Orange County.

Despite being the sixth most populous county in the nation, Orange County does not have its own network television stations, relying on Los Angeles-based broadcast outlets for evening news and programming. In 2010, Orange County-based KOCE-TV did become Southern California's primary PBS station after Los Angeles-based KCET left PBS to go independent. Like the rest of the nation, Orange County has seen a tremendous shift from traditional to digital media. At the national level, total newspaper readership declined from approximately 60 million in 1990 to approximately 21 million in 2022; almost 1,800 newspapers across the United States have gone out of business since 2004.

ORANGE COUNTY TIMELINE, 1999–2024

Some notable events in Orange County from the last 25 years include:

1999
- RVCA founded in Costa Mesa
- Newport Beach Film Festival established

2000
- City of Rancho Santa Margarita incorporated

2001
- Disney California Adventure Park opens, alongside Downtown Disney and the Grand Californian Hotel
- Soka University of America opens in Aliso Viejo

2002
- The Angels win the World Series
- Pao Fa Temple opens in Irvine
- The Donald Bren School of Information and Computer Sciences opens at UCI

2004
- Islamic Center of Irvine opens

2005
- The Newport Beach California Temple opens

2007
- The Anaheim Ducks win the Stanley Cup
- Orange County Great Park opens
- The University of California, Irvine School of Law opens

2008
- Parts of the Irvine Ranch Open Space are designated a National Natural Landmark
- Anaheim GardenWalk opens
- Radio station KOCI begins broadcasting

2009
- The Lyon Air Museum opens near John Wayne Airport

2010
- The California Fish and Game Commission's Marine Life Protection Act Initiative creates several new protected spaces in Orange County, including the Dana Point State Marine Conservation Area and the Laguna Beach State Marine Reserve

2011
- KOCE becomes SoCal's primary PBS station

2012
- Airwolf 3D founded in Costa Mesa

2014
- The Anaheim Regional Transportation Intermodal Center (ARTIC) opens
- Anaheim Packing House opens

2015
- Hilbert Museum of California Art opens at Chapman University

2017
- The Jack & Shanaz Langson Institute & Museum of California Art opens at UCI

2018
- Anduril Industries moves to Orange County
- Chipotle moves headquarters to Orange County

2019
- *Star Wars:* Galaxy's Edge opens at Disneyland Resort
- Hana Re and Taco Maria become the first OC restaurants to receive Michelin stars

2021
- The Disneyland Resort reopens after by far the longest closure in its history due to the COVID-19 pandemic

2023
- OCVIBE construction begins

2024
- Disneyland Forward is approved

EQUITY PROFILE OF ORANGE COUNTY

In early 2025, Orange County Grantmakers in collaboration with USC Equity Research Institute will release an updated version of the 2019 Equity Profile of Orange County that will be available in an online, interactive format. Aligned with many of the same indicators from the *Community Indicators* report, the 2025 Equity Profile of Orange County will present demographic data reflecting the population across the county by race, gender, and immigration status and compare these shifting dynamics over time. Economic data on these communities includes data on both economic growth and inequalities that persist across the county including data on wage growth, poverty, and estimated GDP gains that can be attained through increasing equity across the county. Data on educational attainment and health outcomes will also be included, adding more context to how prepared our residents are for evolving economic conditions. Additionally, data on regional issues such as affordable housing, exposure to air pollution, and civic engagement, provide additional insights on how Orange County's residents and neighborhoods are interconnected and linked to the region's diverse economy.

Taken together, the OC Equity Profile will add additional equity focused context to the *Community Indicators* report. For more information visit www.ocgrantmakers.org.

FINAL THOUGHTS

While many surprises undoubtedly await Orange County in the next several decades, including potential global socioeconomic disruptions, some things will likely stay the same. The county has demonstrated incredible strengths — resilience to economic shocks, a strong educational system, an internationally known quality of life and strong tourism industry — that will likely continue for the next 25 years and beyond.

To retain Orange County's status as a regional economic powerhouse with a famous quality of life, county policymakers, business executives, and other stakeholders need reliable, accurate, and comprehensive information. The Orange County *Community Indicators* team intends to continue filling this need well beyond the report's 25th anniversary.
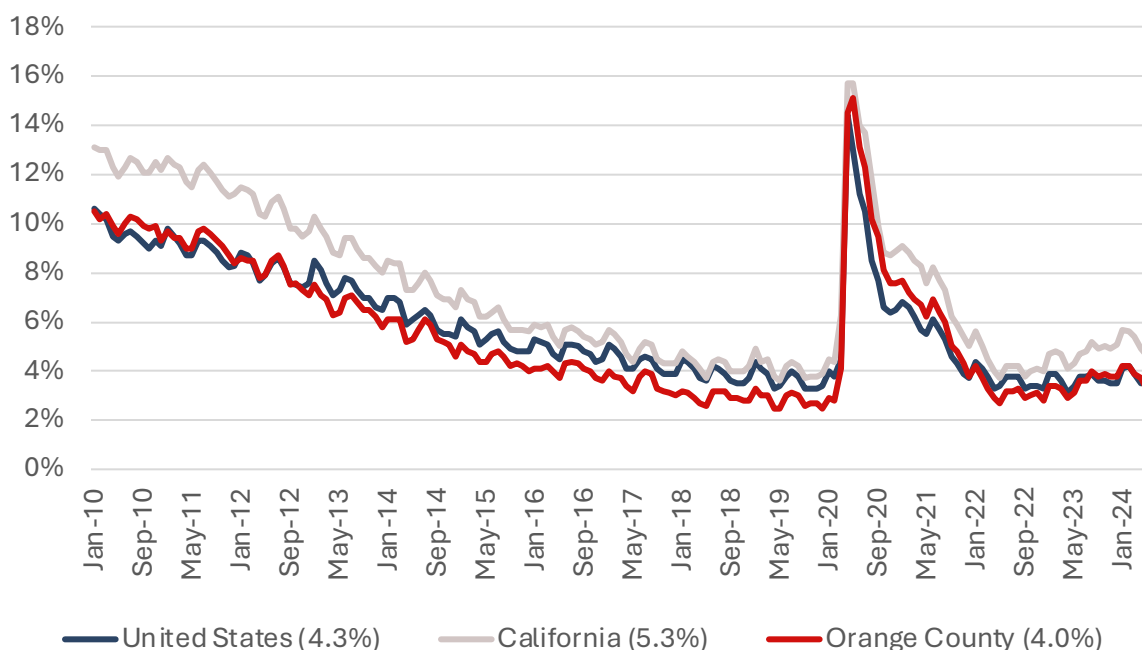
ECONOMY
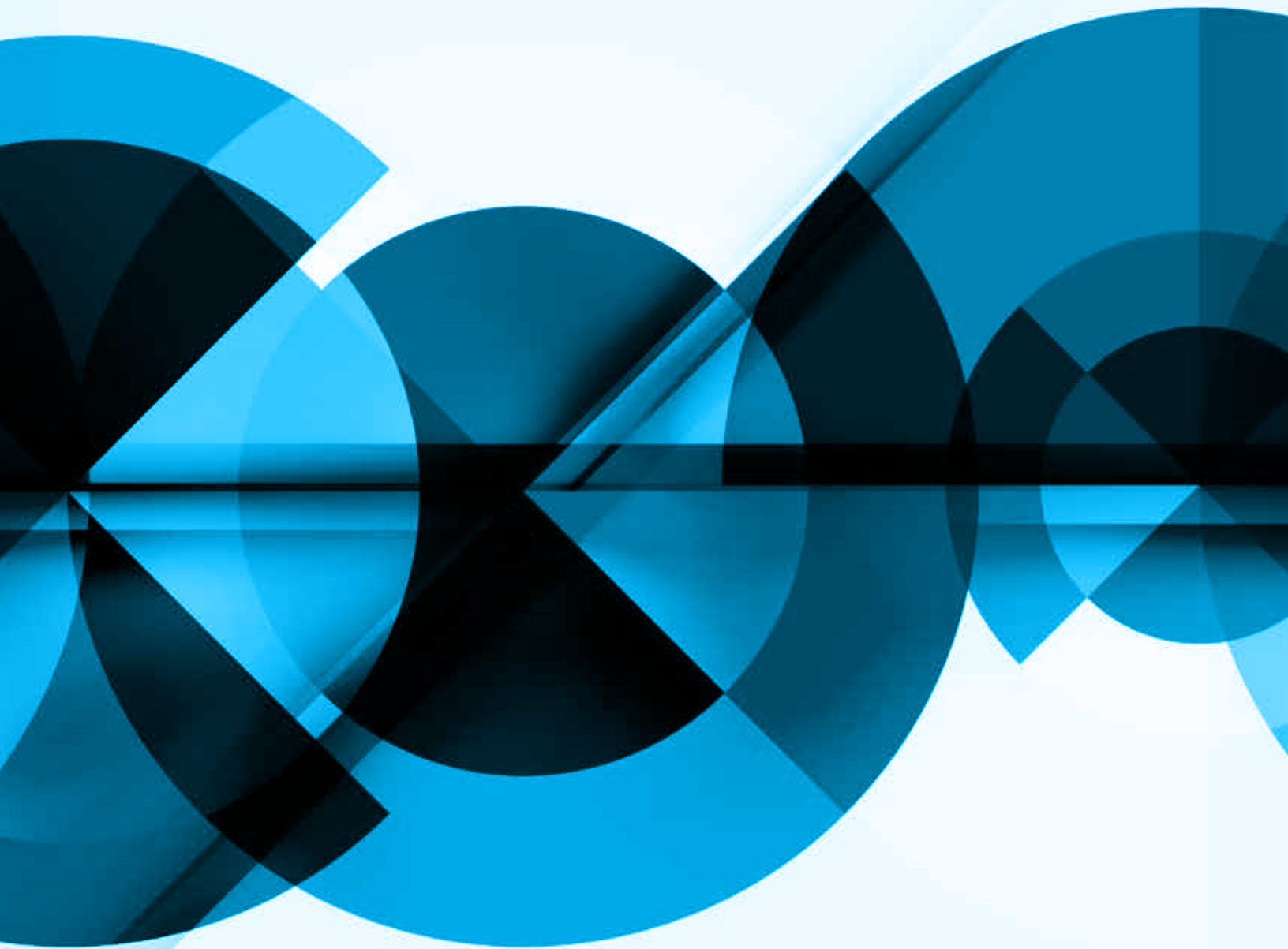
EMPLOYMENT

COUNTY UNEMPLOYMENT RATE BEGINS TO RISE IN SECOND HALF OF 2024

UNEMPLOYMENT RATE IN ORANGE COUNTY, CALIFORNIA, AND UNITED STATES, 2010–JUNE 2024

United States (4.3%)   California (5.3%)   Orange County (4.0%)

Source: California Employment Development Department, Bureau of Labor Statistics
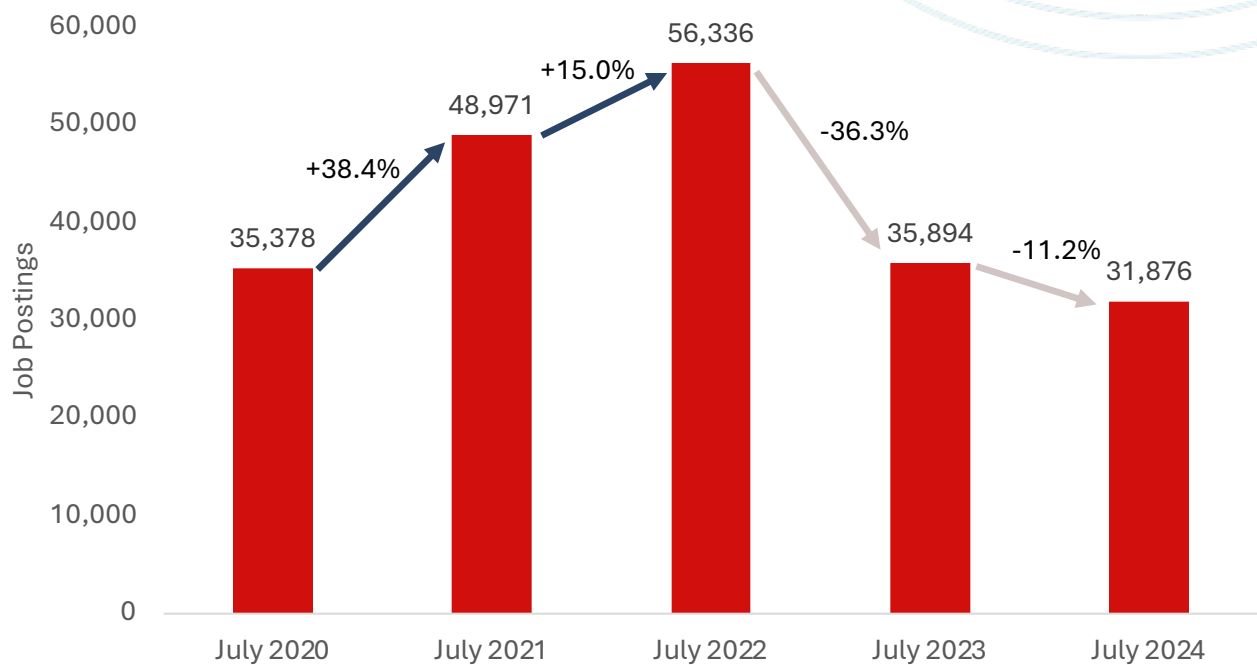
Orange County had an unemployment rate of 4.0 percent in June 2024, lower than state (5.3 percent) and national (4.3 percent) averages. While Orange County had seen continued progress since the beginning of 2024, this latest unemployment rate represents an increase of 0.8 percentage points over the previous month and 0.4 percentage points over the past year. This trend is mirrored at the state and national levels, with national unemployment rates jumping by 0.8 percentage points over the past month and the state level unemployment rate jumping 0.7 percentage points over the same time period.

Between June 2023 and June 2024, Orange County's Education and Health Services sector saw the highest job growth, adding 14,600 jobs, followed by Leisure and Hospitality at 5,700 jobs and Government at 3,400 jobs. Four sectors saw employment declines including Manufacturing which lost 3,200 jobs, Information which lost 1,300 jobs, and Financial Activities and Professional and Business Services which both lost 400 jobs each.

Overall, total nonfarm employment in Orange County increased by 23,800 from June 2023 to June 2024, an increase of 1.4 percent reaching a total of 1,708,800. At the same time, total unemployment increased from 56,700 to 63,600, a 12.2 percent jump, and the civilian labor force increased slightly from 1,574,800 to 1,576,300. While Orange County's labor market remains one of the leaders in Southern California, a broader national economic slowdown in the 2nd half of 2024 could create headwinds for future employment growth.

EMPLOYMENT DEMAND WEAKENS FURTHER IN 2024

TOTAL JOB POSTINGS IN ORANGE COUNTY, JULY 2020–JULY 2024

Job Postings

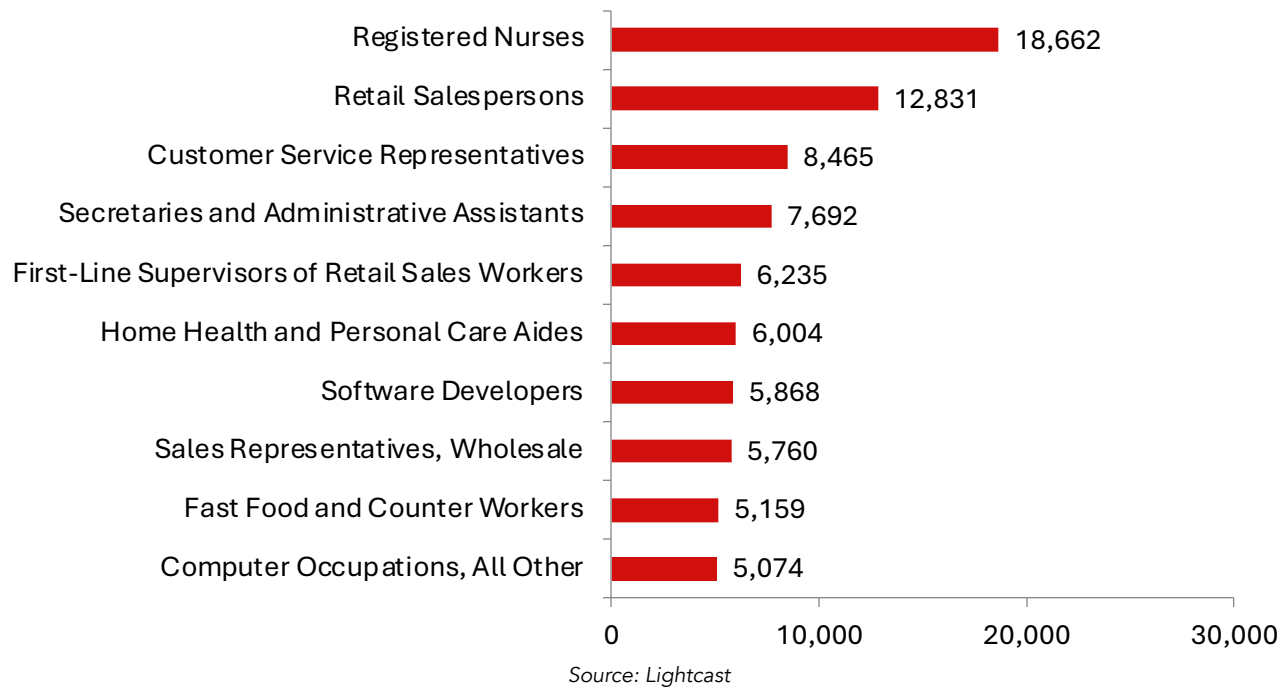|				
35,378	48,971	56,336	35,894	31,876
July 2020	July 2021	July 2022	July 2023	July 2024

+38.4% +15.0% -36.3% -11.2%

Source: Lightcast

The first half of 2024 had clear signs of a slowing labor market. Orange County had 31,876 job postings in July 2024, a year-over-year decline of 11.2 percent from July 2023's total of 35,894. Between July 2023 and July 2024, the county saw a total of 418,505 unique job postings with a median post duration of 25 days and an advertised average annual salary of $56,200. While 50 percent of job postings had no required education level listed, 26 percent required a bachelor's degree, 22 percent required a high school diploma or GED, and only 11 percent required a graduate or professional degree.

The University of California, Irvine had 8,247 unique job postings between July 2023 and July 2024, more than any other county employer. Second place Providence had 4,317 postings, while third place Aerotek had 3,106. Irvine employers had the most unique job postings at 85,660, followed by Anaheim with 40,777 job postings and Orange with 34,435 job postings.

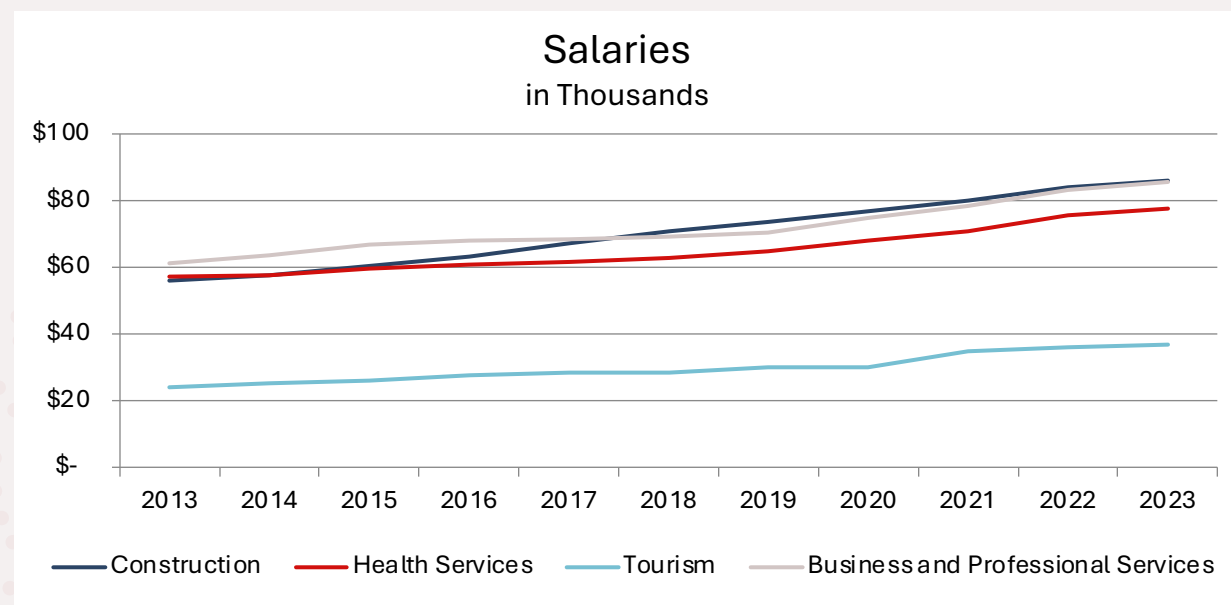# SOFTWARE DEVELOPERS SEE A DECLINE IN DEMAND; REGISTERED NURSES STILL MOST IN-DEMAND OCCUPATION

MOST IN-DEMAND OCCUPATIONS IN ORANGE COUNTY BY JOB POSTINGS, JULY 2023–JULY 2024

Occupation	Job Postings
Registered Nurses	18,662
Retail Salespersons	12,831
Customer Service Representatives	8,465
Secretaries and Administrative Assistants	7,692
First-Line Supervisors of Retail Sales Workers	6,235
Home Health and Personal Care Aides	6,004
Software Developers	5,868
Sales Representatives, Wholesale	5,760
Fast Food and Counter Workers	5,159
Computer Occupations, All Other	5,074

Source: Lightcast

Registered Nurses continued to be the most in-demand occupation in Orange County with 18,662 unique job postings from July 2023 to July 2024, followed by Retail Salespersons with 12,831 job postings and Customer Service Representatives with 8,465 job postings.

TOURISM AND HEALTH SERVICES CLUSTERS RISE; BUSINESS AND PROFESSIONAL SERVICES FALL

EMPLOYMENT AND AVERAGE SALARIES IN ORANGE COUNTY CLUSTERS WITH MORE THAN 50,000 JOBS, Q4 2013–2023
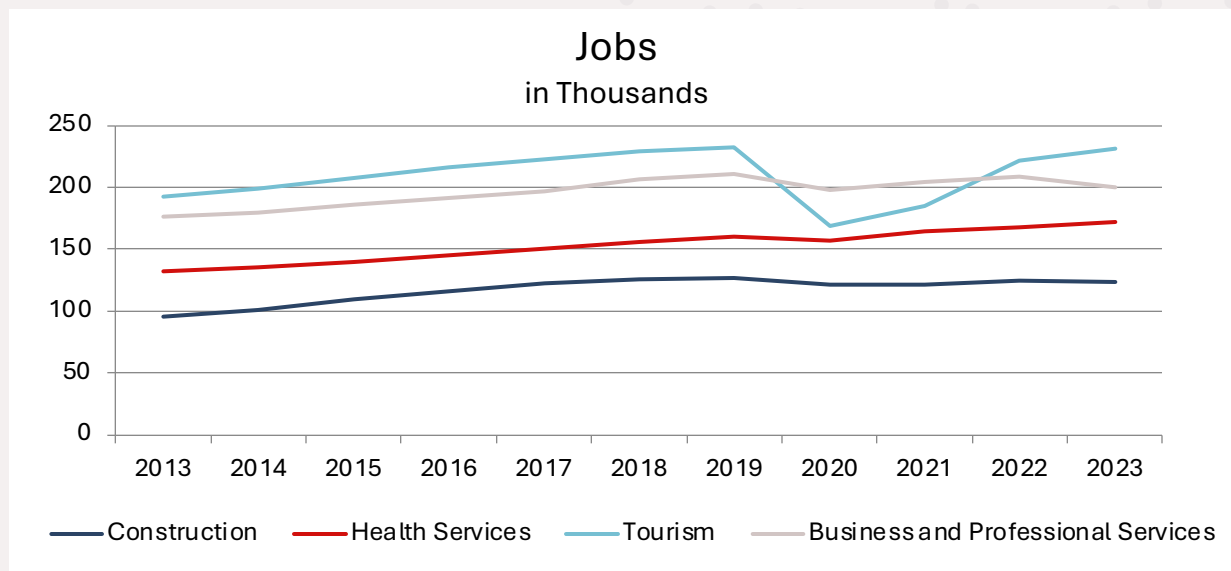
Jobs
in Thousands

Construction — Health Services — Tourism — Business and Professional Services

Salaries
in Thousands

Construction — Health Services — Tourism — Business and Professional Services

Sources: Data has been updated from California Employment Development Department to Lightcast and, as such, should not be compared to previous years' data.

INDUSTRY SALARIES SEE HEALTHY GAINS

EMPLOYMENT AND AVERAGE SALARIES IN ORANGE COUNTY CLUSTERS WITH 50,000 JOBS OR FEWER, 2013–2023
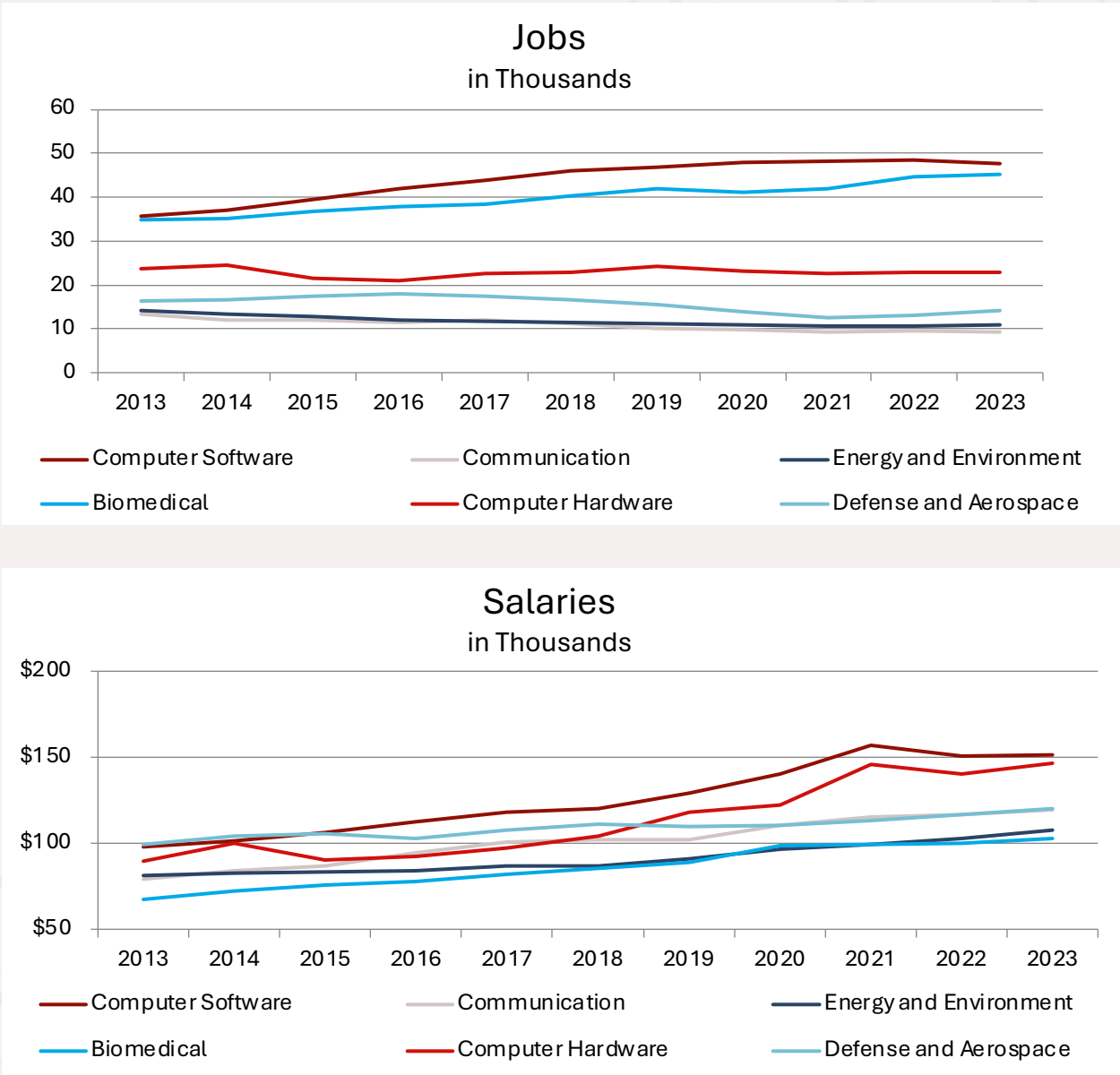
Jobs
in Thousands

Legend:
- Computer Software
- Communication
- Energy and Environment
- Biomedical
- Computer Hardware
- Defense and Aerospace

Salaries
in Thousands

Legend:
- Computer Software
- Communication
- Energy and Environment
- Biomedical
- Computer Hardware
- Defense and Aerospace

Sources: Data has been updated from California Employment Development Department to Lightcast and, as such, should not be compared to previous years' data.

After dropping to 790,697 in 2020, Orange County industry cluster employment rebounded to 819,077 in 2021 and to 871,701 by 2022, representing an increase of 10.2 percent over 2020 totals. Cluster employment reached 875,580 in 2023, a year-over-year increase of 0.4 percent. While total cluster employment remains below its pre-pandemic peak of 880,085 in 2019, this recent growth is a strong sign of the county's overall economic health.

The following industry clusters saw the largest growth from 2022 to 2023:

Defense and Aerospace	Tourism	Health Services	Energy and Environment	Biomedical	Computer Hardware
+7.4%	+4.1%	+2.8%	+2.6%	+0.9%	+0.6%

Four industry clusters have seen employment declines from 2022 to 2023:

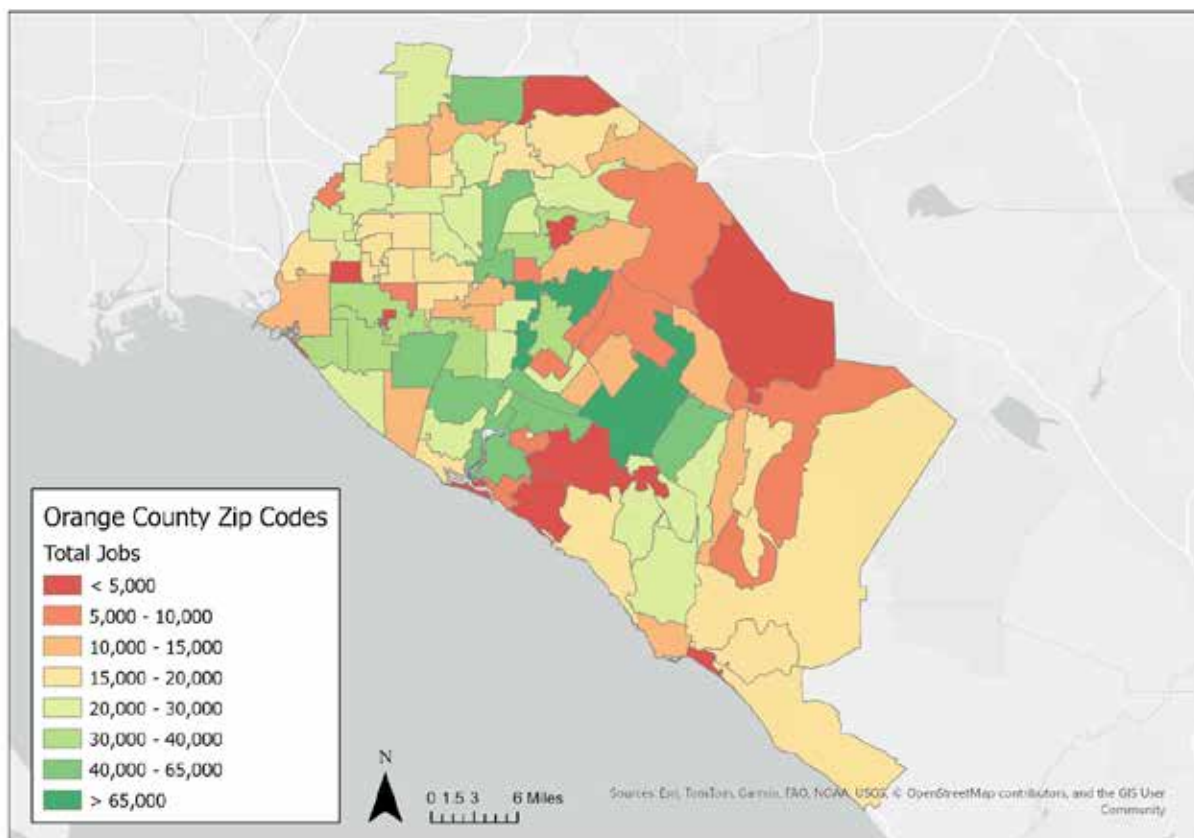| Business and Professional Services	Communications	Computer Software	Construction
-4.4%	-2.6%	-1.7%	-1.2%

All of Orange County's industry clusters saw wage growth between 2022 and 2023. The top 5 industry clusters by wage growth included:

Energy and Environment	Computer Hardware	Defense and Aerospace	Business and Professional Services	Biomedical
+4.4%	+4.1%	+3.0%	+3.0%	+2.6%

IRVINE REMAINS THE JOBS HUB OF ORANGE COUNTY

ORANGE COUNTY TOTAL JOBS BY ZIP CODE, 2024

Orange County Zip Codes
Total Jobs

- < 5,000
- 5,000 - 10,000
- 10,000 - 15,000
- 15,000 - 20,000
- 20,000 - 30,000
- 30,000 - 40,000
- 40,000 - 65,000
- > 65,000

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

Irvine continues to be the jobs hotspot in Orange County with 311,212 jobs in 2024, followed by Anaheim (183,954 jobs) and Santa Ana (164,661 jobs). Looking at resident workers against commuters, Irvine was fairly evenly split with 52.5 percent of workers being residents and 47.4 percent of workers being commuters. This compares to Santa Ana, which was 59.2 percent resident workers, or Newport Beach with commuters representing 55.5 percent of jobs in the region.

HIGH-TECH DIVERSITY AND GROWTH

MANY CALIFORNIA REGIONS FALL IN MILKEN INSTITUTE RANKINGS

RANKINGS FOR LOCATION QUOTIENT COUNT IN ORANGE COUNTY COMPARED TO PEER METRO AREAS, 2023–2024			
METRO REGIONS	2023 RANK	2024 RANK	CHANGE IN RANK
Oakland, CA	2	1	1
Orange County, CA	**1**	**4**	**-3**
Austin, TX	12	4	8
San Jose, CA	5	7	-2
San Diego, CA	2	9	-7
San Francisco, CA	11	12	-1
Los Angeles, CA	7	14	-7
Dallas, TX	33	23	10
Seattle, WA	49	51	-2
Boston, MA	49	51	-2
Minneapolis, MN	76	51	25
Riverside/San Bernardino, CA	106	111	-5

Source: Milken Institute, 2024 Best Performing Cities Report

OC RISES TO 32ND ON JOB GROWTH RANKINGS, FALLS TO 171ST ON HIGH-TECH GDP RANKING

RANKINGS OF HIGH-TECH GDP OUTPUT IN 2020–2021 FOR ORANGE COUNTY AND PEER REGIONS, 2023–2024			
METRO REGIONS	2023 RANK	2024 RANK	CHANGE IN RANK
Austin, TX	18	12	6
Dallas, TX	82	39	43
Seattle, WA	73	73	0
San Francisco, CA	12	90	-78
Minneapolis, MN	168	103	65
Boston, MA	89	136	-47
Los Angeles, CA	39	161	-122
Orange County, CA	**76**	**171**	**-95**
Riverside/San Bernardino, CA	60	172	-112
San Diego, CA	47	175	-128
San Jose, CA	34	176	-142
Oakland, CA	75	181	-106

Source: Milken Institute, 2024 Best Performing Cities Report

Most California cities have declined in the Milken Institute's Best Performing Cities rankings. Orange County is no exception, falling 22 places from 56th on the 2023 list to 78th in 2024. Riverside/San Bernardino (-53 places) and Los Angeles (-54) saw more precipitous declines, while San Diego (rising from 38th to 37th) and San Francisco (35th to 27th) were the only California cities with higher rankings in 2024.

Orange County lost its 1st place ranking for Location Quotient Count to Oakland, falling to 4th place. It also fell from 76th to 171st place in High-Tech GDP, as did many other California cities; San Jose, for example, fell from 34th to 176th.

OC HIGH-TECH CONCENTRATION RANK DROPS TO 23RD

| REGIONAL RANKINGS FOR HIGH-TECH INDUSTRY CONCENTRATION FOR ORANGE COUNTY AND PEER REGIONS, 2023–2024			
METRO REGIONS	2023 RANK	2024 RANK	CHANGE IN RANK
San Jose, CA	1	1	0
San Francisco, CA	2	2	0
Seattle, WA	3	3	0
Austin, TX	12	7	5
Oakland, CA	9	10	-1
San Diego, CA	7	11	-4
Dallas, TX	25	18	7
Orange County, CA	**15**	**23**	**-8**
Boston, MA	39	38	1
Minneapolis, MN	58	41	17
Los Angeles, CA	17	49	-32
Riverside/San Bernardino, CA	105	159	-54

Source: Milken Institute, 2024 Best Performing Cities Report

Orange County also declined in the High-Tech Concentration rankings, falling from 15th to 23rd, as well as in Wage Growth (from 58th to 175th) and Housing Affordability (191st to 192nd). However, Orange County's Job Growth ranking jumped significantly by almost 100 places, from 123rd to 32nd, with Broadband Access rankings also rising sharply from 10th to 2nd place.

DIVERSITY IN BUSINESS

ONLY OC AND RIVERSIDE COUNTIES SEE INCREASE IN WOMEN-OWNED BUSINESSES

REGIONAL WOMAN-OWNED, MINORITY-OWNED, AND MINORITY WOMAN-OWNED BUSINESSES PER 100,000 PEOPLE, 2024
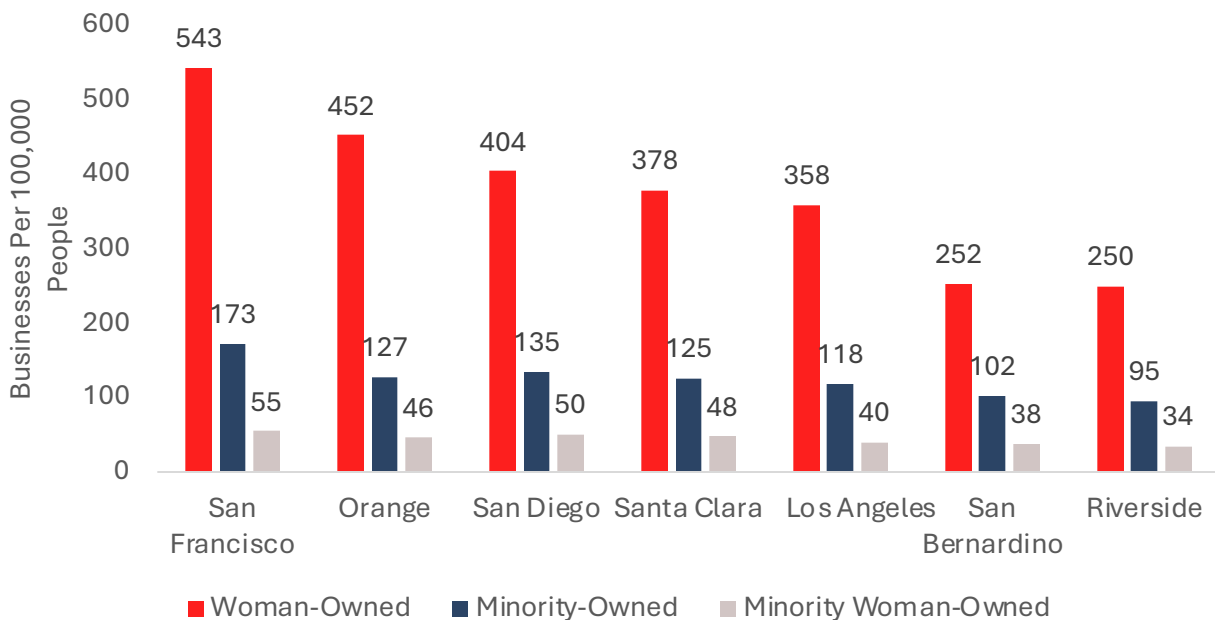
Source: Dun and Bradstreet, Market Insight

The number of women-owned businesses per 100,000 residents in Orange County increased for the second year in a row, from 448 in 2023 to 452 in 2024. The per capita number of minority-owned businesses in the county, however, declined by 0.2 percent over the past year. The number of minority women-owned businesses also declined by 0.8 percent.

Among Orange County's peers and neighbors, Riverside County saw the largest increase in women-owned businesses (+1.4 percent from 2023 to 2024) while Los Angeles saw the largest decline, a drop of 3.1 percent over the same period. San Diego County saw the largest declines in both minority-owned businesses (-1.5 percent) and minority women-owned businesses (-2.2 percent). Riverside County saw the largest increase in minority-owned businesses (+0.7 percent) while San Francisco County saw the largest increase in minority women-owned businesses (+0.2 percent).

# Happy, healthy neighbors. That's our mission.

Kaiser Permanente is a proud investor of the Orange County Business Council.

At Kaiser Permanente, we continuously strive to improve the conditions for health and equity in our communities. Our doors, hearts and minds are always open to help you thrive. Learn more at

kp.org/community
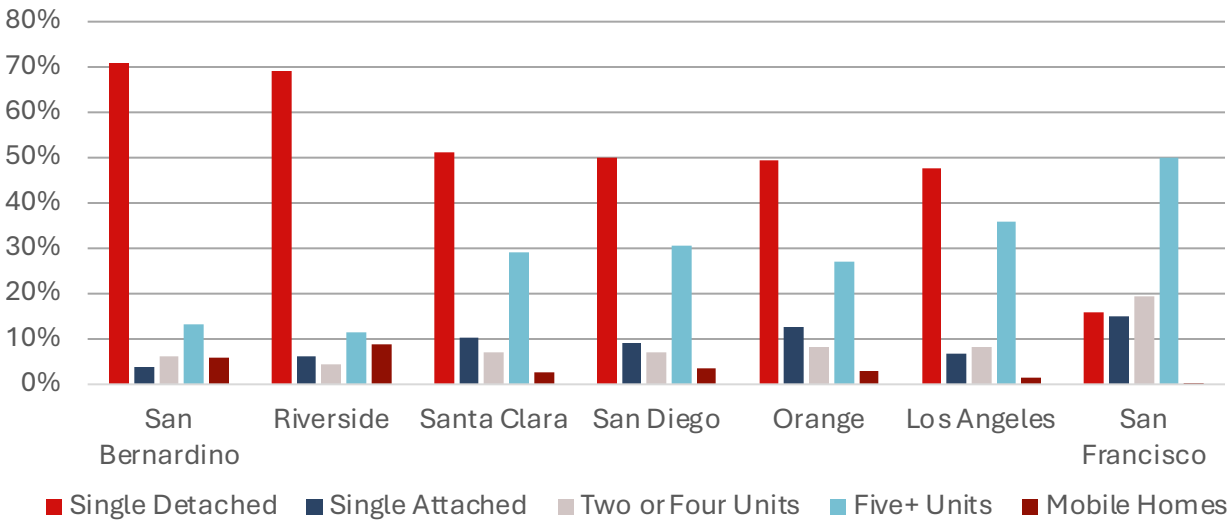
**For all that is Orange County.
For all that is you.**

 KAISER PERMANENTE®
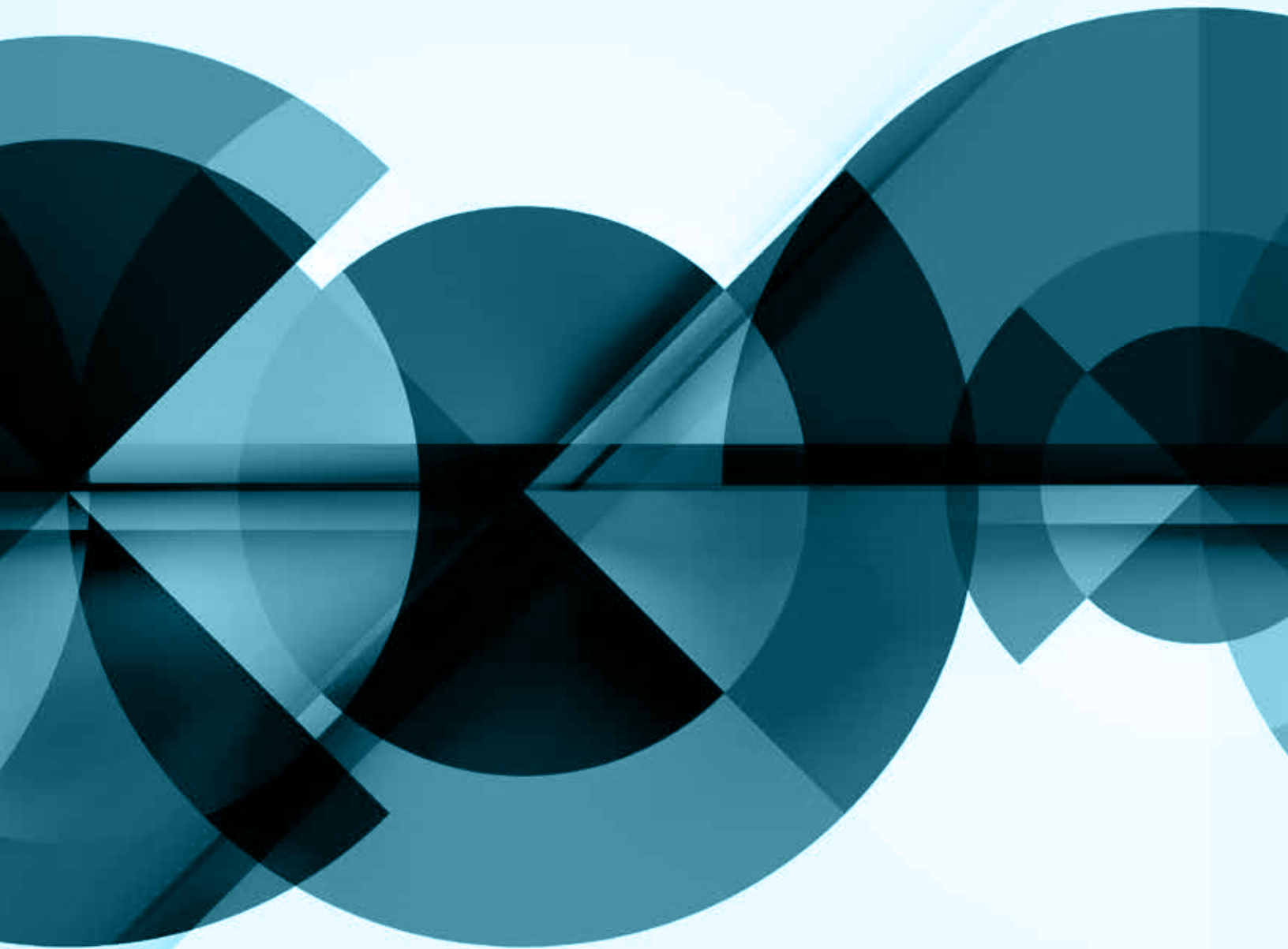
HOUSING

HOUSING LANDSCAPE

PROPORTION OF SINGLE-DETACHED UNITS DECLINES WHILE MULTIFAMILY UNITS INCREASE

HOUSING STRUCTURES BY TYPE FOR PEER CALIFORNIA REGIONS, 2024

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2024. Sacramento, California, May 2024.

Orange County added 7,482 housing units between 2023 and 2024, a 0.7 percent increase; the county now has a total of 1,157,425 housing units. Housing structures with 5+ units per structure saw the largest increase over the past year, from 309,290 in 2023 to 312,718 in 2024, a jump of 3,428 units or 1.1 percent. As of 2024, 5+ unit structures make up 27.0 percent of all housing units in Orange County, a slight increase over 26.9 percent in 2023.

The number of single detached housing units increased by 2,423 or by 0.4 percent while the number of single attached housing units increased by 1,588 or 1.1 percent. Single detached housing units account for almost half (49.5 percent) of all Orange County housing units, compared to 12.5 percent for single attached housing units.

Orange County currently has a housing vacancy rate of 4.9 percent, the exact same rate as in 2023. This is significantly lower than the state-level rate of 6.4 percent and reflects the extremely high demand to live in the county.

COMMUNITY INDICATORS: OC IN THE STATE OF THE NATION'S HOUSING

According to The State of the Nation's Housing 2024, a report by the Joint Center for Housing Studies of Harvard University, the Los Angeles-Long Beach-Anaheim metro area had the fourth highest median income-housing cost ratio out of 385 US metro areas; only San Jose-Sunnyvale-Santa Clara, Santa Maria-Santa Barbara, and Santa Cruz-Watsonville had higher ratios. In comparison, neighboring San Diego County had the 11th highest ratio while the Inland Empire had the 37th highest ratio.

As of 2024, the region's median home price was 10.4 times its median income. This figure has doubled over the past forty years.

While all four of the nation's highest income-housing ratio areas are in California, declining home affordability is a national issue. As the report notes, national home prices have risen by approximately 47 percent since 2020. As of March 2024, 97 of the nation's 100 largest metro areas had seen a year-over-year home price increase.
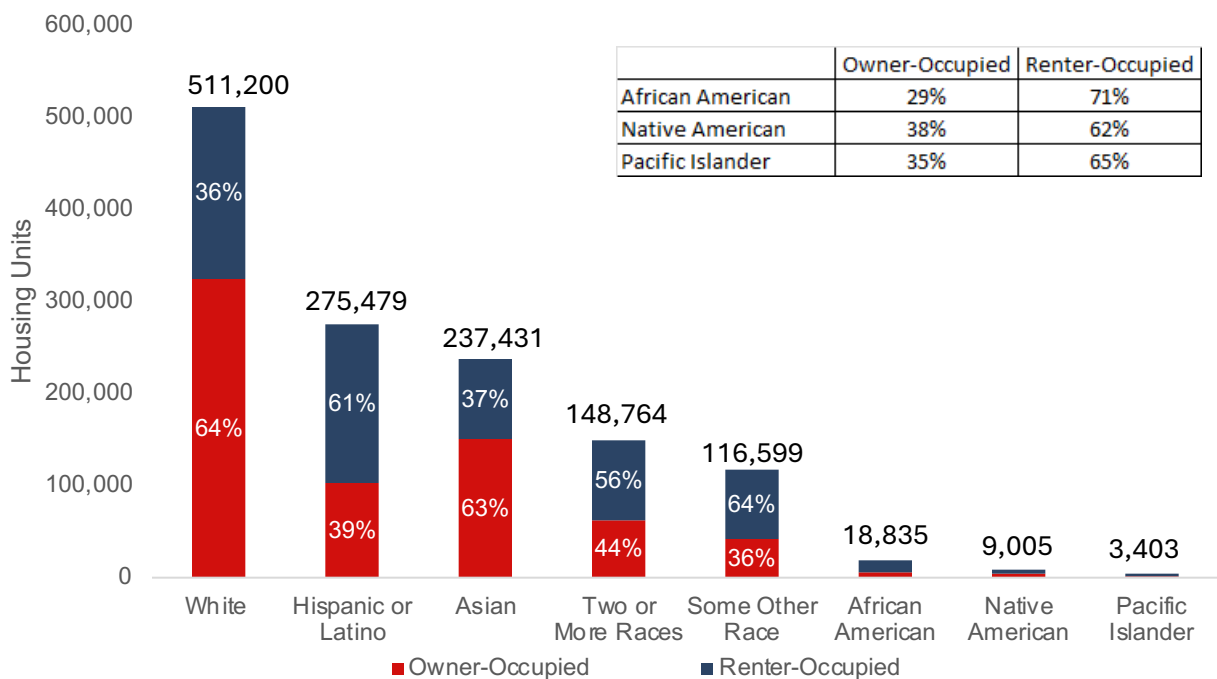
HOMEOWNERSHIP RATE IN ORANGE COUNTY AND PEER REGIONS, 2022
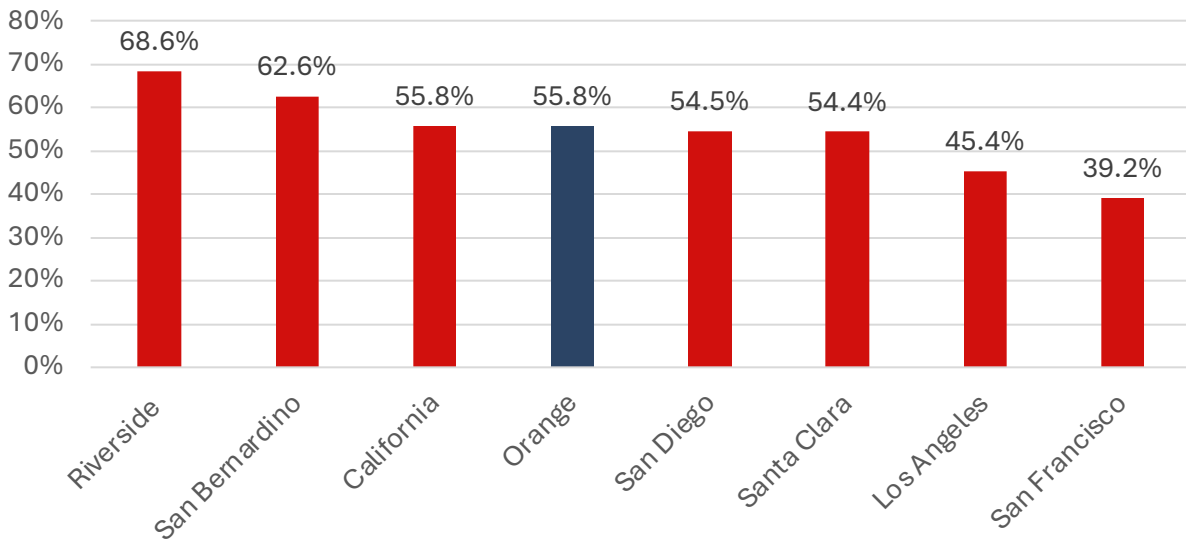
Source: U.S. Census Bureau, American Community Survey

Orange County's high home prices have driven a decrease in homeownership rates by encouraging residents to rent or even relocate to more affordable areas. The county's overall homeownership rate fell from 56.5 percent in 2021 to 55.8 in 2022, a decline of 0.7 percentage points. Rental rates had a corresponding increase from 44.2 percent to 43.5 percent. While Orange County matches the state homeownership rate and is higher than other coastal counties including San Diego and Los Angeles, it remains below lower-cost, more inland regions such as Riverside and San Bernardino counties.

OWNER- AND RENTER-OCCUPIED RATES OF HOMEOWNERSHIP BY MAJOR ETHNIC GROUPS IN ORANGE COUNTY, 2022

	Owner-Occupied	Renter-Occupied
African American	29%	71%
Native American	38%	62%
Pacific Islander	35%	65%

Housing Units

- White: 511,200 — 64% Owner-Occupied, 36% Renter-Occupied
- Hispanic or Latino: 275,479 — 39% Owner-Occupied, 61% Renter-Occupied
- Asian: 237,431 — 63% Owner-Occupied, 37% Renter-Occupied
- Two or More Races: 148,764 — 44% Owner-Occupied, 56% Renter-Occupied
- Some Other Race: 116,599 — 36% Owner-Occupied, 64% Renter-Occupied
- African American: 18,835
- Native American: 9,005
- Pacific Islander: 3,403

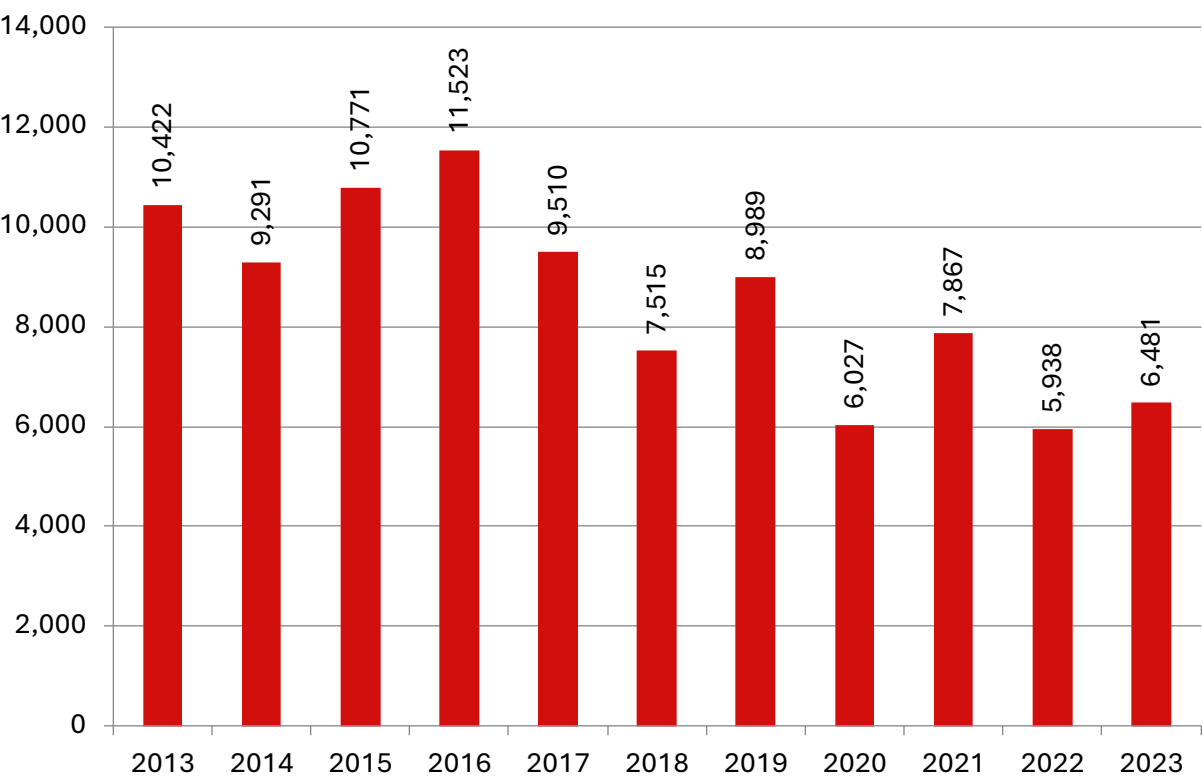■ Owner-Occupied   ■ Renter-Occupied

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

White residents had the county's highest homeownership rate in 2022 at 63.5 percent followed by Asian residents at 63.3 percent and residents who identify as 'two or more' races at 42.1 percent. African American residents had the highest rate of renter-occupied units at 71.1 percent, followed by Pacific Islander residents at 64.9 percent, and residents who identify as 'some other race' at 64.4 percent. The importance of homeownership for long-term wealth generation underscores the need to increase overall housing supply and thus create homeownership for all Orange County communities.

BUILDING PERMITS SEE SMALL JUMP IN 2023

ORANGE COUNTY BUILDING PERMIT ANNUAL TRENDS, 2013–2023

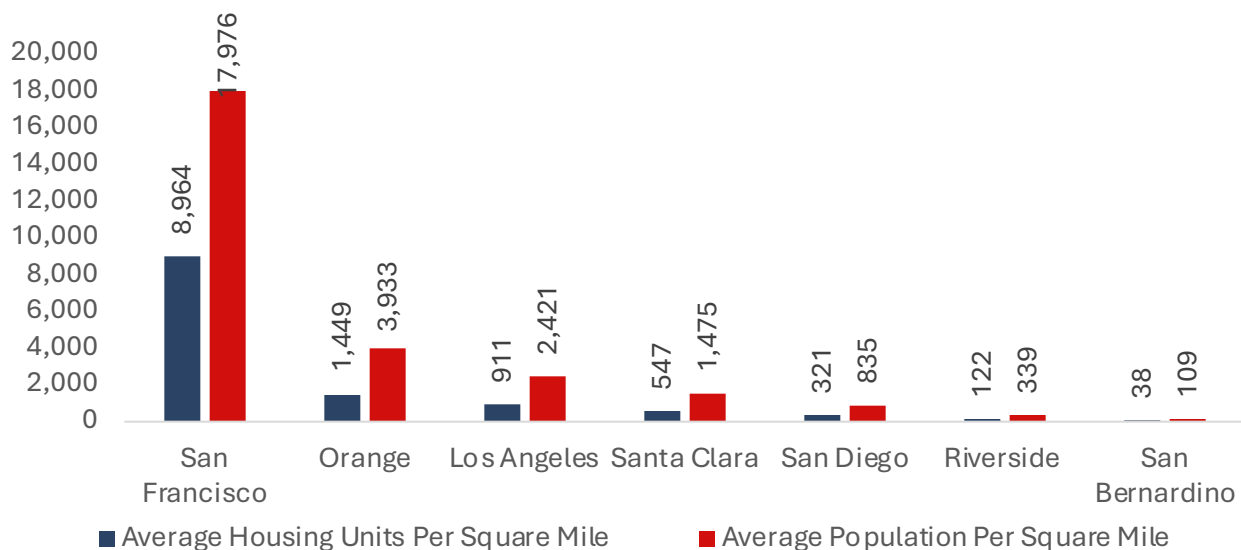| Year	Permits
2013	10,422
2014	9,291
2015	10,771
2016	11,523
2017	9,510
2018	7,515
2019	8,989
2020	6,027
2021	7,867
2022	5,938
2023	6,481

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

After several consecutive years of declining total building permits (from 7,867 in 2021 to 5,938 in 2022, for instance), Orange County saw an increase of 9.1 percent in 2023 for a total of 6,481 permits. Despite this increase, Orange County has a long way to go before new housing construction keeps pace with rising housing demand, which is primarily driven by employment growth.

POPULATION AND HOUSING DENSITY INCREASES IN 2024

HOUSING UNIT AND POPULATION PER SQUARE MILE IN PEER CALIFORNIA COUNTIES, 2024

Legend: ■ Average Housing Units Per Square Mile ■ Average Population Per Square Mile

Data:
- San Francisco: 8,964 / 17,976
- Orange: 1,449 / 3,933
- Los Angeles: 911 / 2,421
- Santa Clara: 547 / 1,475
- San Diego: 321 / 835
- Riverside: 122 / 339
- San Bernardino: 38 / 109

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2024. Sacramento, California, May 2024.

The incredible demand to live in Southern California — especially in Orange County — has led to increased population and housing density. San Bernardino experienced the largest increase in housing density over the past year, 1.6 percent. Orange County's housing density per square mile increased from 1,439 to 1,449, an increase of 0.7 percent. San Francisco County saw the largest increase in population density per square mile over the past year, increasing by 1.4 percent. At the same time, Orange County's population density increased from 3,926 to 3,933, an increase of 0.002 percent.

HOUSING AFFORDABILITY

OC HOME PRICES HIT NEW HIGHS

MEDIAN EXISTING SINGLE-FAMILY HOME SALE PRICE IN ORANGE COUNTY AND CALIFORNIA, JUNE 2014 – JUNE 2024
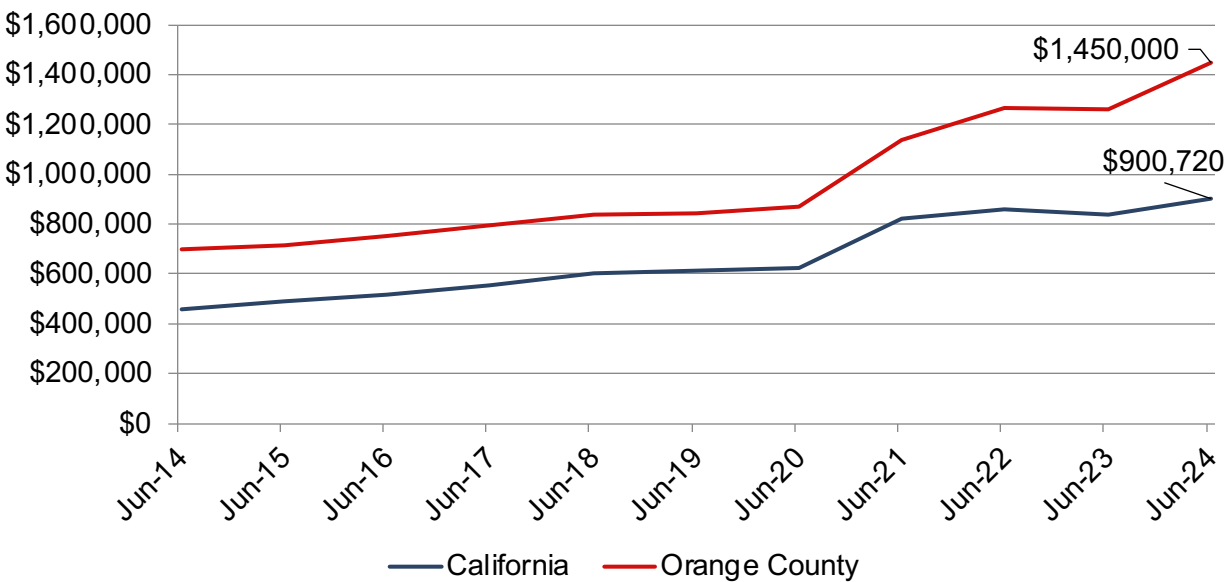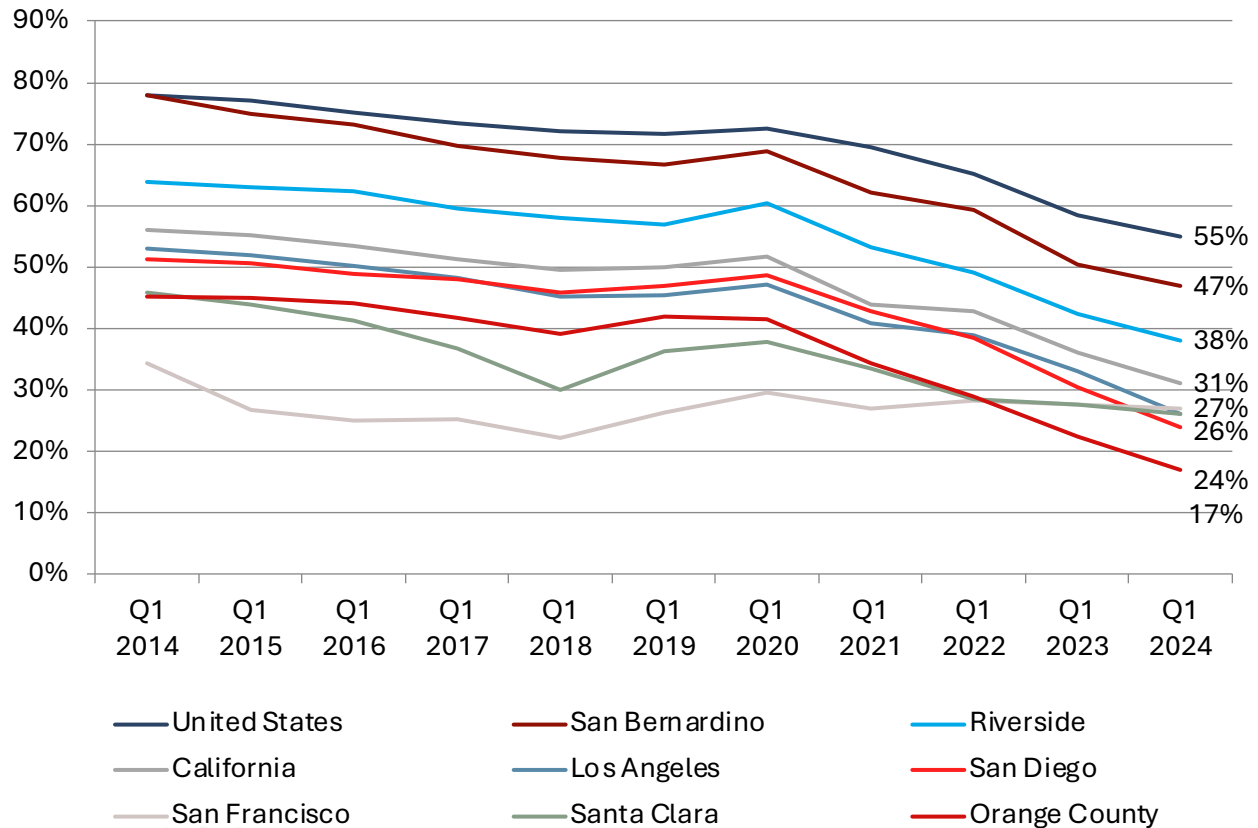
Source: California Association of Realtors, Current Sales & Price Statistics

Orange County home prices continue to rise due to high demand, a lack of adequate housing supply, and relatively high mortgage rates. The county's median home price is $1,450,000 as of June 2024, compared to $1,260,000 in June 2023. This 15.1 percent year-over-year increase was significantly higher than the 7.5 percent increase at the state level, a trend also true of the past decade; county home prices have increased by 108.1 percent over the past 10 years compared to 96.8 percent in California as a whole. Orange County's median home price remains significantly higher than the state average of $900,720 as of June 2024.

FIRST-TIME HOME BUYER AFFORDABILITY HITS RECORD LOW

REGIONAL COMPARISON OF THE PERCENTAGE OF FIRST-TIME HOMEBUYERS ABLE TO AFFORD AN ENTRY-LEVEL HOME, Q1 2014 – Q1 2024
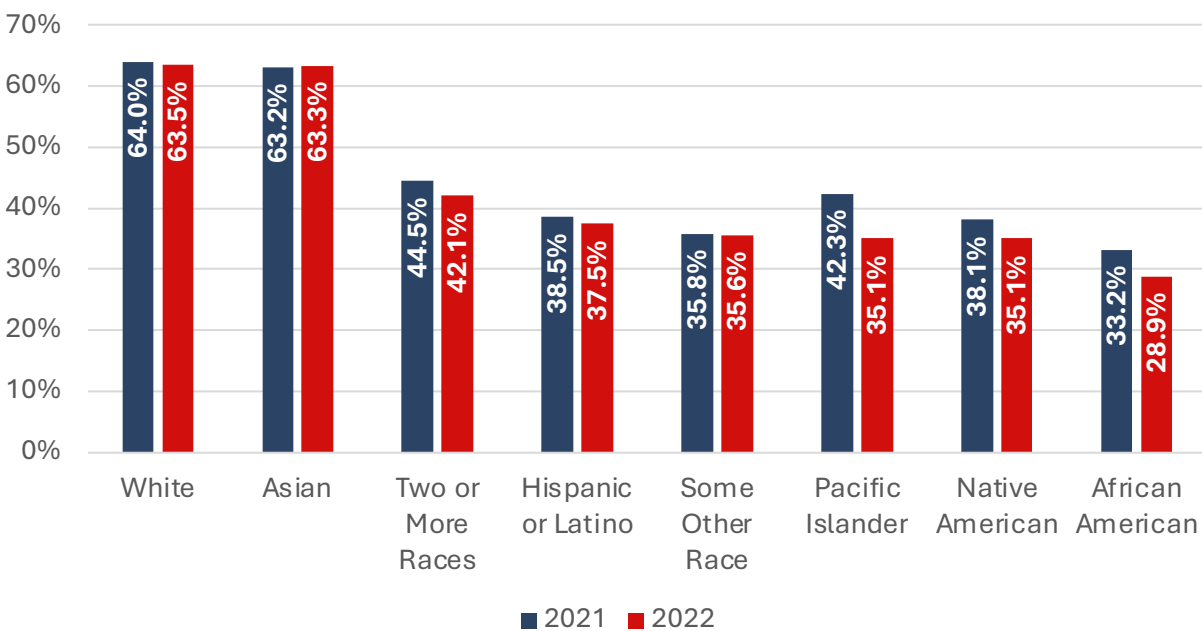

Source: California Association of Realtors, First-Time Home Buyer Affordability Index

As of Q1 2024, Orange County homebuyers would need a minimum qualifying income of $349,200 for a 'traditional' median priced home of $1,365,000. This represents a year-over-year increase of 17.8 percent over Q1 2023's minimum qualifying income of $296,400. Only 11 percent of county residents could afford a median priced home in Q1 2024, a slight year-over-year decline of a single percentage point. The percentage of first-time homebuyers who could afford a home decreased over the same period, from 22 percent to 17 percent. Orange County remains California's second least affordable county for first-time buyers, trailing only Mono County.

While affordability concerns are a statewide issue, these statistics show that they are particularly acute in Orange County. As the Federal Reserve continues to leverage interest rate policy to tame inflation, mortgage rates remain elevated. Future Fed rate decreases, and as a result, future home prices, remain uncertain. As a result, Orange County stakeholders should make increasing housing supply a priority moving forward, specifically housing supply across a range of wage and income levels.

ONLY OC ASIAN RESIDENTS SEE IMPROVEMENT IN HOMEOWNERSHIP

ORANGE COUNTY HOMEOWNERSHIP RATE BY RACE OR ETHNICITY, 2021 AND 2022

| Race or Ethnicity	2021	2022
White	64.0%	63.5%
Asian	63.2%	63.3%
Two or More Races	44.5%	42.1%
Hispanic or Latino	38.5%	37.5%
Some Other Race	35.8%	35.6%
Pacific Islander	42.3%	35.1%
Native American	38.1%	35.1%
African American	33.2%	28.9%

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

Declining affordability rates have caused a corresponding decline in homeownership rates. Only one Orange County ethnic group — Asian residents — saw a slight increase in homeownership rates between 2021 (63.2 percent) and 2022 (63.3 percent). Homeownership rates declined for all other groups. Pacific Islanders saw the largest decline, from 42.3 percent to 35.1 percent. African American residents (-4.3 percent) and Native American residents (-3.0 percent) saw the second and third highest declines, respectively.

Homeownership rates among White residents — the group with the county's highest overall rate — also declined from 64.0 percent to 63.5 percent.

LOW-INCOME RESIDENTS SEE DISPROPORTIONATE IMPACT FROM HIGH COSTS

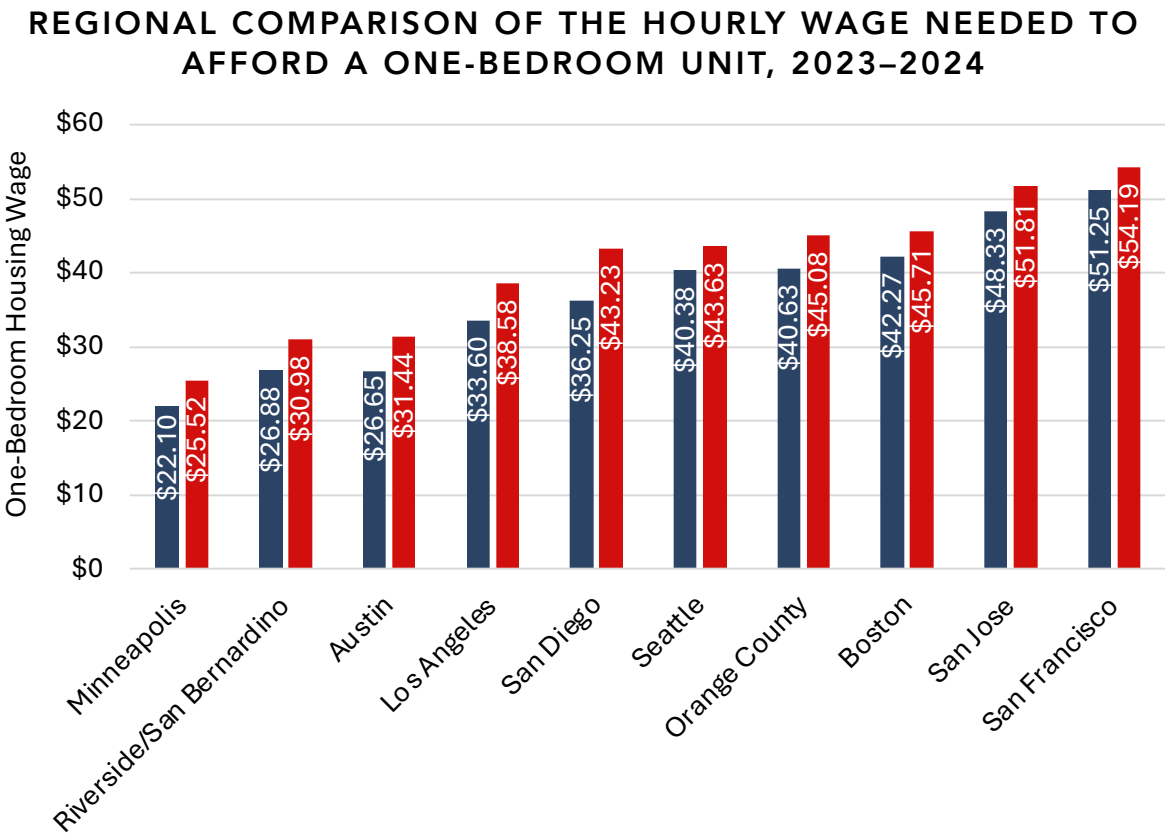## ORANGE COUNTY OWNER-OCCUPIED HOUSING COSTS AS A PERCENT OF INCOME, 2022
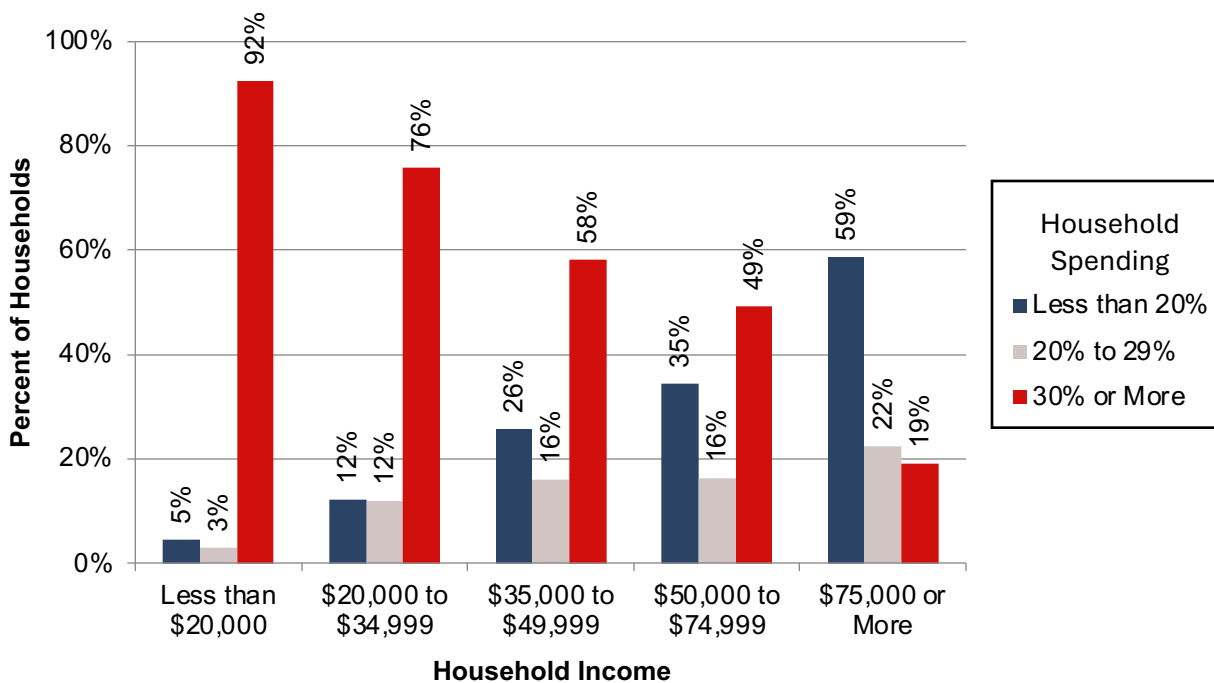
Source: U.S. Census Bureau, American Community Survey 1-Year Estimates

Approximately 92 percent of owner-occupied households making under $20,000 per year spend over 30 percent of their incomes on housing costs, compared to 76 percent of households making between $20,000 and $34,999 and 58 percent of households making between $35,000 and $49,999. This compares to only 19 percent of households making $75,000 or more. As housing costs continue to rise, low-income residents will have to spend an increasingly large portion of their incomes on housing, thereby limiting their ability to save and to make other major discretionary and non-discretionary purchases. These trends will likely limit both economic and population growth by pricing out residents and encouraging them to relocate to more affordable areas; this will have a disproportionate impact on young workers and families, the most important people for the future of Orange County's economy.

RENTAL AFFORDABILITY

ORANGE COUNTY'S HOUSING WAGE HIGHEST IN SOUTHERN CALIFORNIA

REGIONAL COMPARISON OF THE HOURLY WAGE NEEDED TO AFFORD A ONE-BEDROOM UNIT, 2023–2024

One-Bedroom Housing Wage

| City	2023	2024
Minneapolis	$22.10	$25.52
Riverside/San Bernardino	$26.88	$30.98
Austin	$26.65	$31.44
Los Angeles	$33.60	$38.58
San Diego	$36.25	$43.23
Seattle	$40.38	$43.63
Orange County	$40.63	$45.08
Boston	$42.27	$45.71
San Jose	$48.33	$51.81
San Francisco	$51.25	$54.19

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

The hourly wage needed to afford a one-bedroom apartment in Orange County rose from $40.63 in 2023 to $45.08 in 2024, an 11.0 percent increase on top of a previous 10.9 percent increase between 2022 and 2023. As of 2024, despite the minimum wage increasing to $16 per hour in the state of California and reflecting the rapid rise in rental rates, a minimum wage employee would need to work 113 hours per week to afford a one-bedroom apartment, compared to 105 hours in 2023 and 98 hours in 2022. Orange County's rental market, in other words, is experiencing the same decline in affordability as its housing market.

REQUIRED WAGE FOR ONE-BEDROOM SURPASSES $45 PER HOUR

HOURLY WAGE NEEDED TO AFFORD A ONE-BEDROOM UNIT IN ORANGE COUNTY, 2016–2024
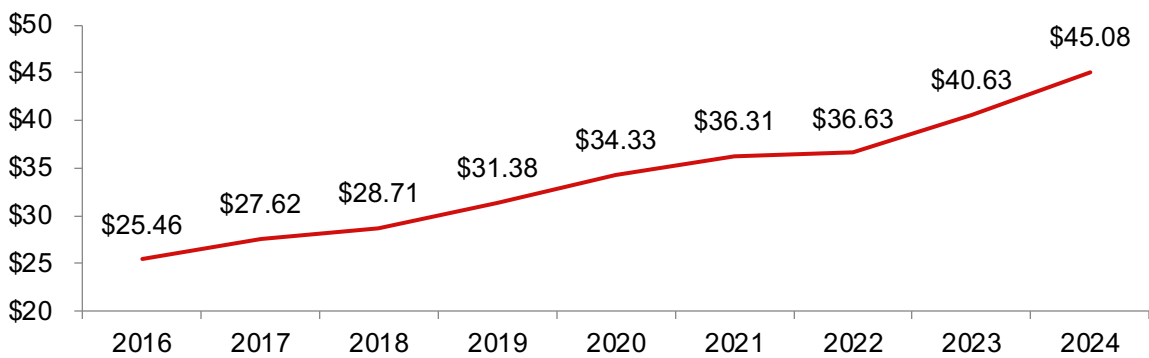
Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development using the methodology of the National Low Income Housing Coalition

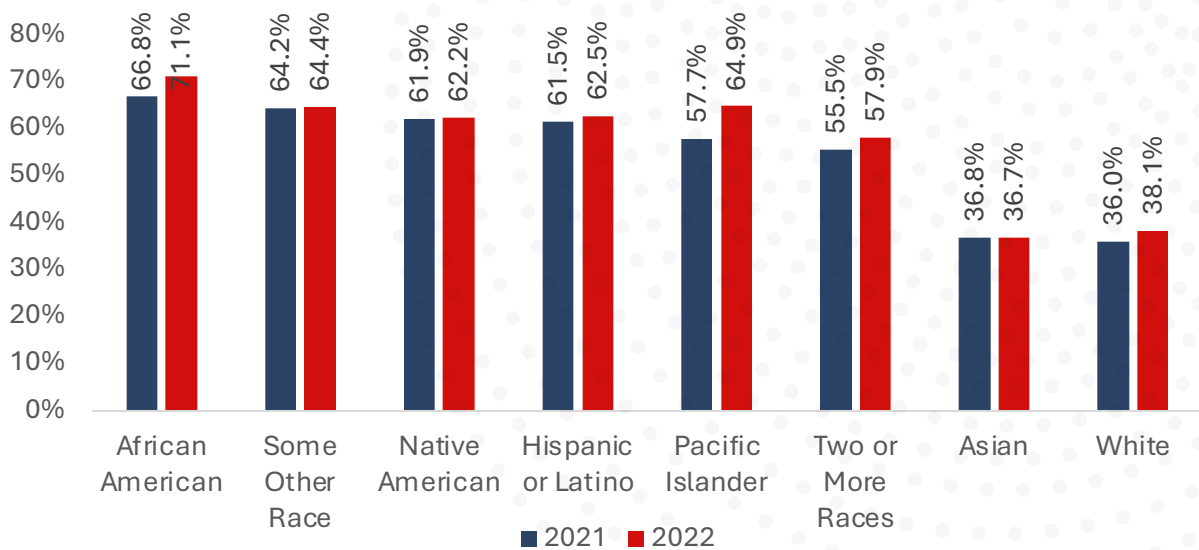# MINIMUM WAGE WORK HOURS REQUIRED PER WEEK JUMPS TO 113

RENTAL MARKET AFFORDABILITY IN ORANGE COUNTY, 2017–2024								
FAIR MARKET RENT (MONTHLY)	2017	2018	2019	2020	2021	2022	2023	2024
One Bedroom	$1,436	$1,493	$1,632	$1,785	$1,888	$1,905	$2,113	$2,344
Two Bedroom	$1,813	$1,876	$2,037	$2,216	$2,331	$2,324	$2,539	$2,783
Three Bedroom	$2,531	$2,626	$2,862	$3,098	$3,227	$3,178	$3,448	$3,769
Amount a household with one minimum wage earner can afford to pay in rent (monthly)	$546	$572	$624	$676	$728	$780	$806	$832
Number of hours per week a minimum wage earner must work to afford a one-bedroom apartment	105	104	105	106	104	98	105	113

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

Fair market rent for a one-bedroom in Orange County also saw a sizeable increase, jumping from $2,113 in 2023 to $2,344 in 2024, an increase of 10.9 percent; the county's fair market rent also increased by 10.9 percent between 2022 and 2023. The fair market rent for two- and three-bedroom units increased by 9.6 percent and 9.4 percent, respectively, over the same period, providing another indication of the county's hot rental market and lack of adequate supply.

HIGH HOUSING COSTS INCREASE RENTAL RATES

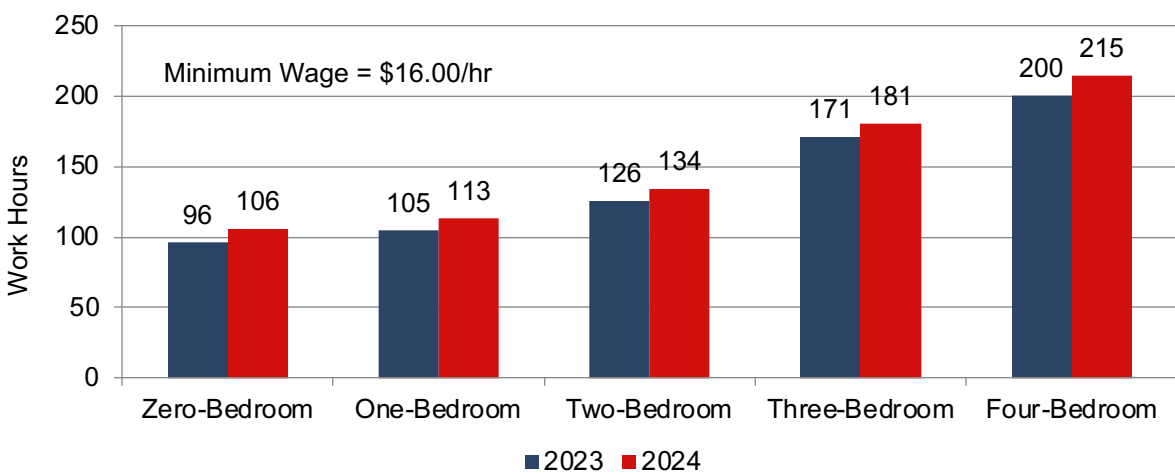## RENTER-OCCUPIED HOUSING RATES BY RACE OR ETHNICITY IN ORANGE COUNTY, 2021 AND 2022

	African American	Some Other Race	Native American	Hispanic or Latino	Pacific Islander	Two or More Races	Asian	White
2021	66.8%	64.2%	61.9%	61.5%	57.7%	55.5%	36.8%	36.0%
2022	71.1%	64.4%	62.2%	62.5%	64.9%	57.9%	36.7%	38.1%

■ 2021　■ 2022

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

Orange County's high housing prices have caused both declining homeownership rates and a corresponding increase in rental rates; the county's overall renter-occupied housing rate has increased growing from 43.5 percent in 2021 to 44.2 percent in 2022, an increase of 0.7 percentage points. Pacific Islanders saw the largest increase in rental rates (+7.2 percent, to a total of 64.9 percent) while African American residents currently have the county's highest rental rate (71.1 percent, a 4.3 percent year-over-year increase). Asians were the only group to see a declining rental rate over the past year, as seen in the chart above.

WORK HOURS FOR ONE-BEDROOM CLIMBS TO 113

ORANGE COUNTY WORK HOURS REQUIRED BY HOUSING SIZE FOR MINIMUM WAGE WORKERS, 2023–2024

Minimum Wage = $16.00/hr

	Zero-Bedroom	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
2023	96	105	126	171	200
2024	106	113	134	181	215

■ 2023　■ 2024

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

INCREASED HOUSING COSTS IMPACT RENTERS AT ALL INCOME LEVELS

ORANGE COUNTY RENTER-OCCUPIED HOUSING COSTS AS A PERCENT OF INCOME, 2022
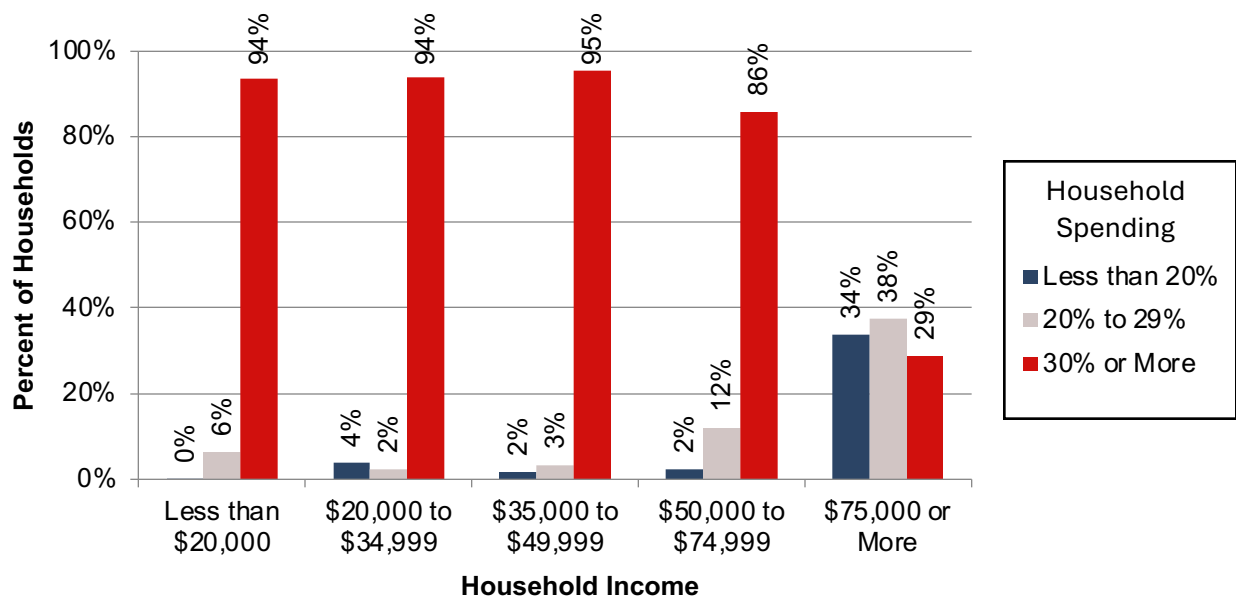

Source: U.S. Census Bureau, American Community Survey 1-Year Estimate

The county's rising housing costs have a clear, disproportionate impact on Orange County's lower-income residents. Ninety-four percent of renter-occupied households in Orange County making less than $35,000 per year spend at least 30 percent of their income on housing, compared to just 29 percent of residents making $75,000 or more. This lack of affordability, however, has started to affect county residents at all income levels. Between 2021 and 2022, for instance, the proportion of renter-occupied households making between $50,000 and $74,999 and renter-occupied households making $75,000 or more who spent 30 percent or more of incomes on housing increased from 81 percent to 86 percent and 24 percent to 29 percent, respectively.

HOUSING SECURITY

PROPORTION OF SHELTERED POINT-IN-TIME HOMELESS BY RACE/ETHNICITY IN ORANGE COUNTY, 2024*

- White
- African American
- Native American
- Asian
- Multiple Races
- Pacific Islander
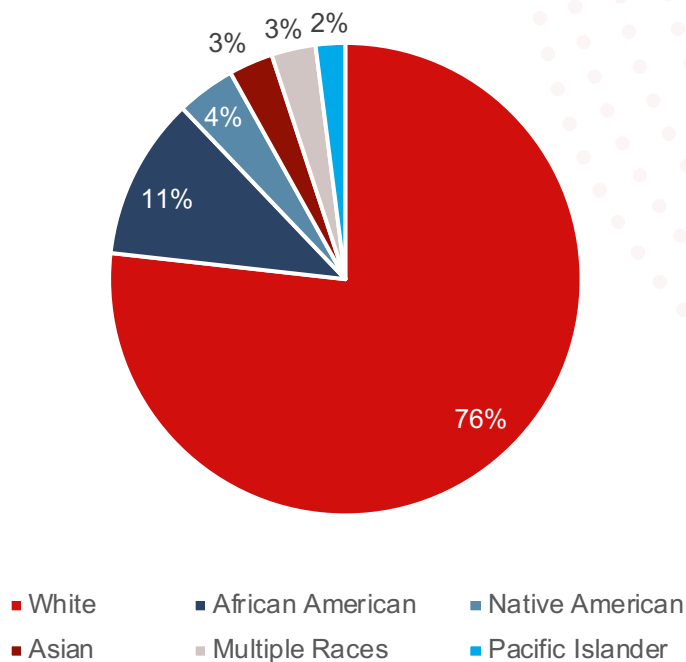
Source: Orange County 2-1-1, 2024 Sheltered Point in Time Count
*Each race/ethnicity contains both Hispanic- and non-Hispanic populations.

One consequence of the county's high and still rising housing costs is an increase in homelessness. The number of county residents living in sheltered homeless arrangements increased from 2,993 in 2023 to 3,149 in 2024, an increase of 5.2 percent. While this does represent a slower increase than the previous year, when the number of sheltered homeless residents rose by 12.5 percent, it still speaks to a significant challenge faced by the county.

Of the county's 3,149 sheltered homeless residents, approximately 30 percent (948) were 'adults and children,' a slight decrease over 2023's total of 953. The number of sheltered homeless adults, on the other hand, increased from 2,029 in 2023 to 2,195 in 2024, illustrating one consequence of the county's limited housing supply.

The majority (76 percent) of Orange County's sheltered homeless residents are White. A disproportionate number (11 percent) of sheltered homeless residents are African American, a group that represents only 1.5 percent of the county's overall population; this points to the need for additional investment into resources and opportunities for all Orange County communities.

SHELTERED HOMELESS COUNTS BY SPECIAL POPULATIONS IN ORANGE COUNTY, 2020–2024
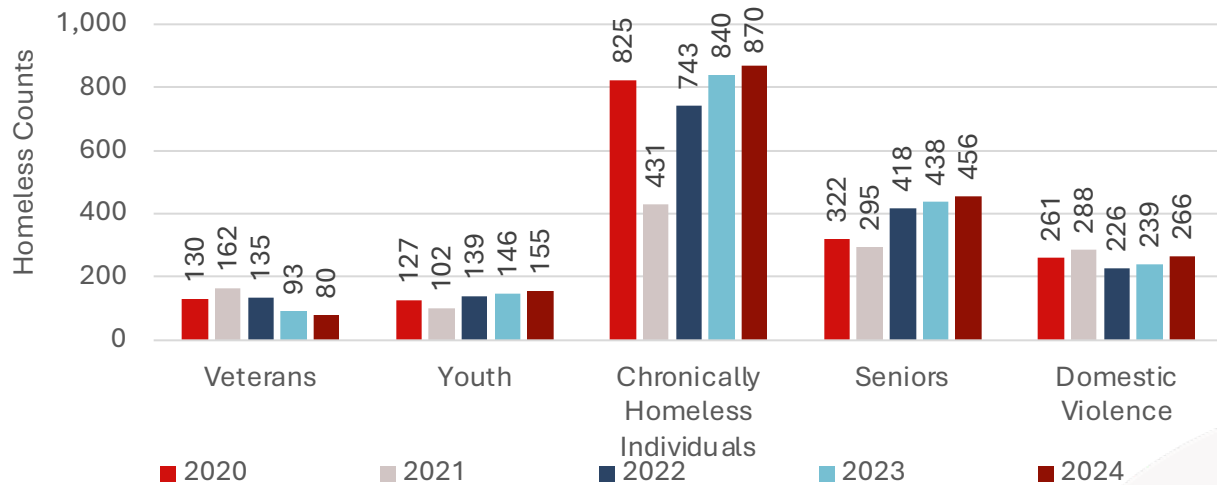
*Source: Orange County 2-1-1, 2024 Sheltered Point in Time Count*

The number of sheltered homeless veterans in Orange County decreased by 14 percent over the past year, from 93 in 2023 to 80 in 2024. Unfortunately, other groups experienced increases. The number of sheltered domestic violence victims, for instance, increased by 11.3 percent, to a total of 266. Chronically homeless individuals were the largest sheltered homeless group in Orange County at 870, representing an increase of 30 individuals or 3.6 percent between 2023 and 2024.

DISABILITIES REPORTED BY PERSONS SHELTERED IN ORANGE COUNTY, 2023–2024
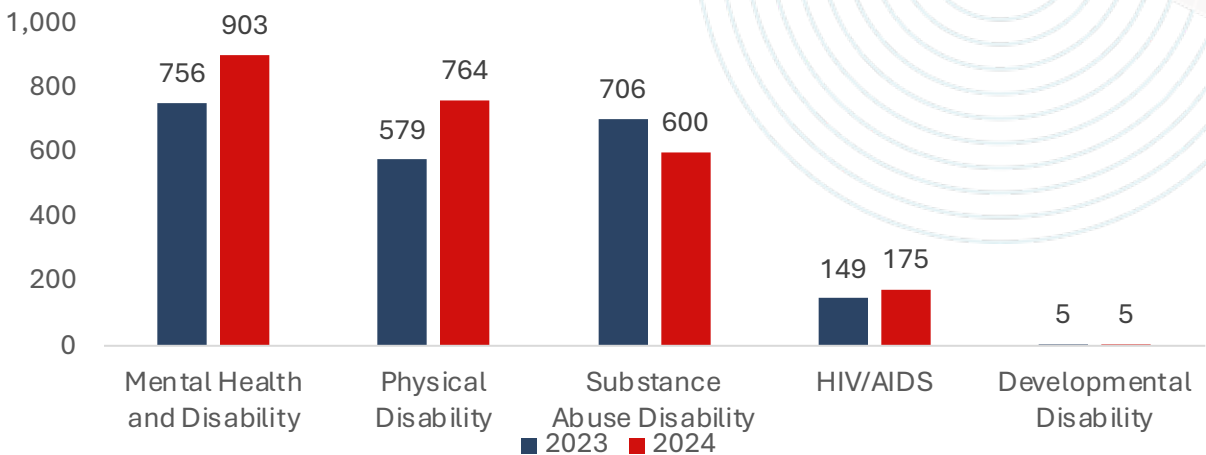
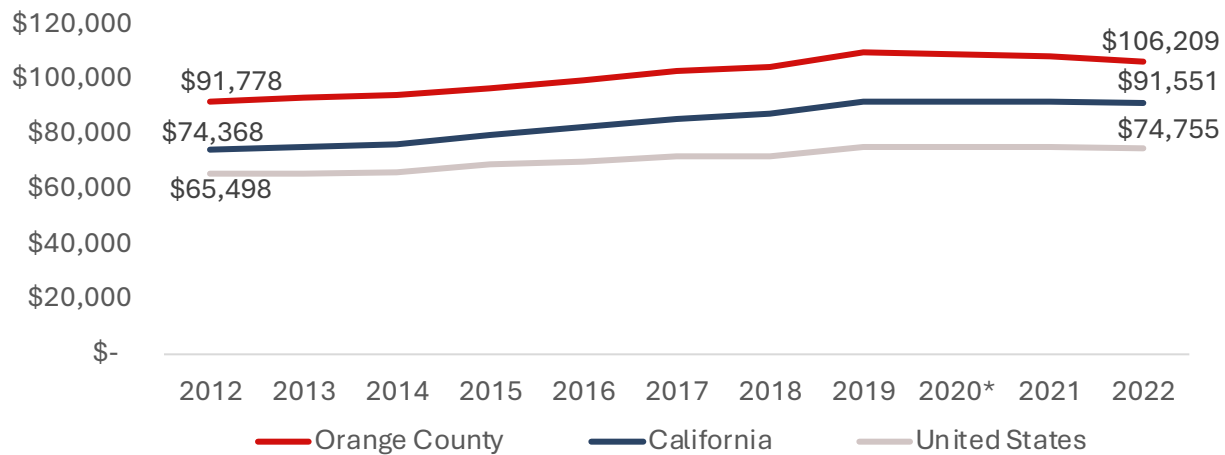*Source: Orange County 2-1-1, 2024 Sheltered Point in Time Count*

INCOME
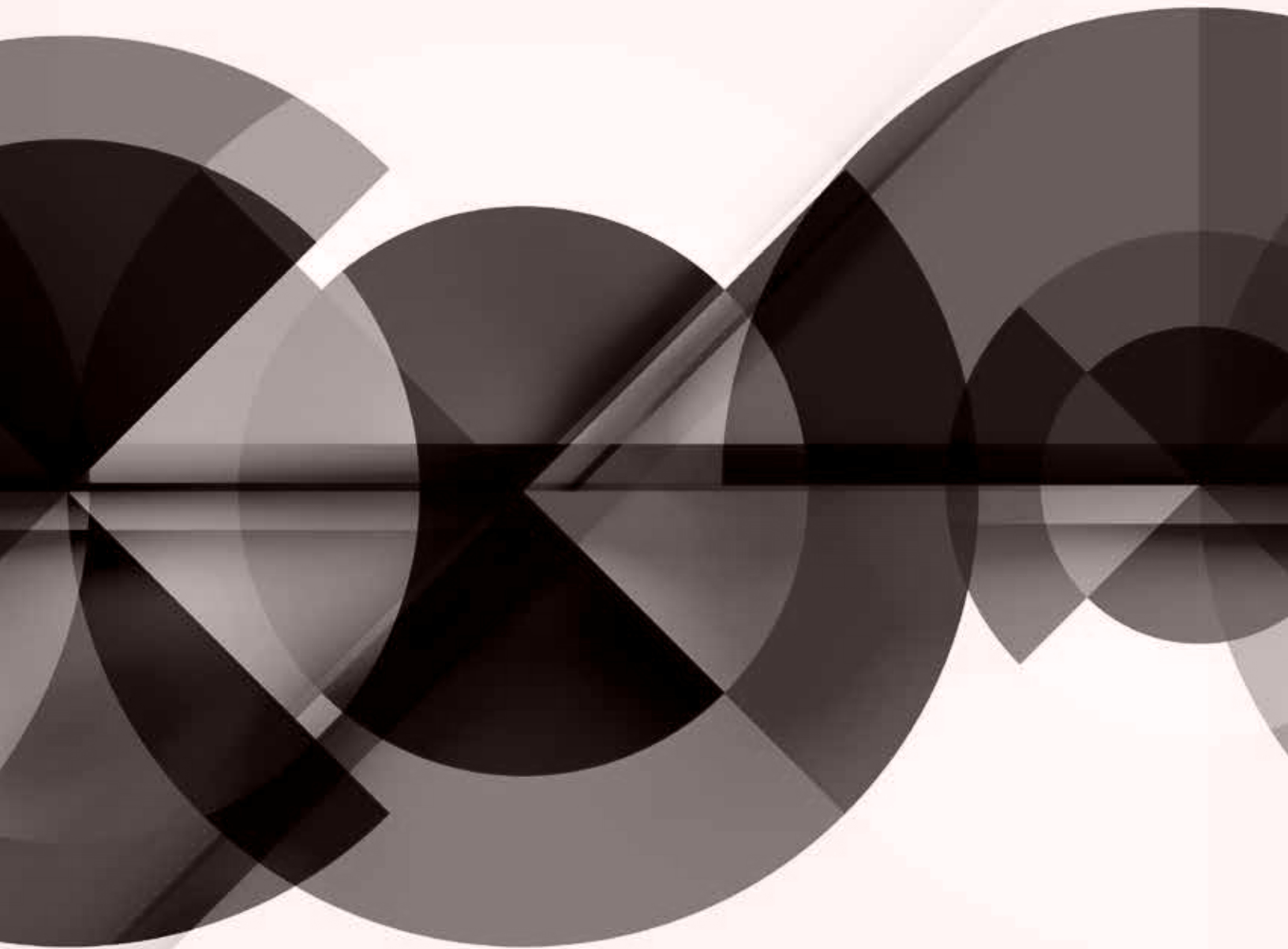
HOUSEHOLD INCOME

INFLATION-ADJUSTED WAGES DECLINED SLIGHTLY IN 2022

MEDIAN HOUSEHOLD INCOME (INFLATION ADJUSTED TO 2022 DOLLARS), ORANGE COUNTY, CALIFORNIA, AND UNITED STATES

Sources: U.S. Census Bureau, American Community Survey, 1-Year Estimates; U.S. Inflation Calculator, reporting Consumer Price Index (CPI-U) data provided by the U.S. Department of Labor, Bureau of Labor Statistics. Data not available for 2020 due to COVID-19-related impacts.

Orange County's median household income fell to $106,209 in 2022, a decline of 2.2 percent from the previous year. While this decline was steeper than those at the state (-0.2 percent) and national (-0.7 percent) levels, Orange County's median income remains significantly higher than state ($91,551) and national ($74,755) averages.

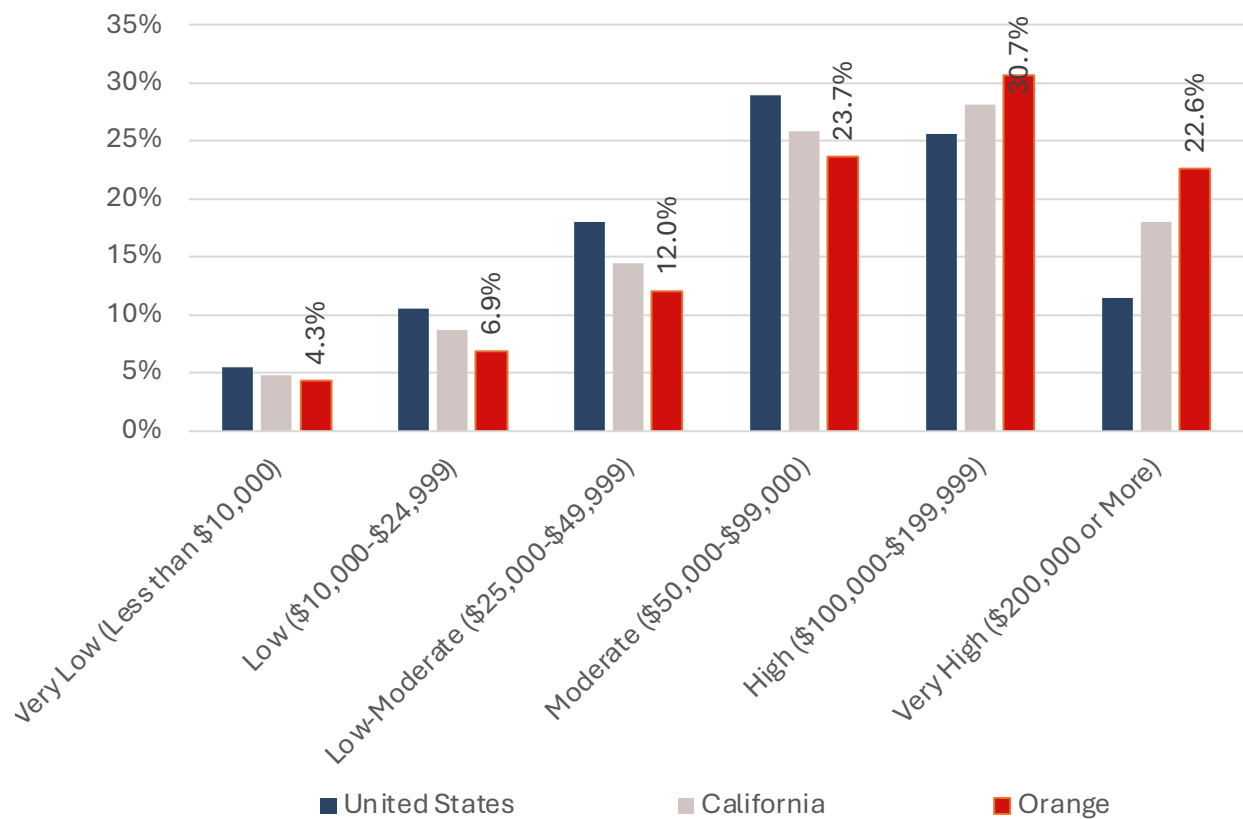|		
Percentage of Orange County residents living in poverty **9.9%**	Percentage of Orange County children living in poverty **10.7%**	Working poor: percentage of residents living in poverty who work full-time **1.8%** or part-time **11.9%**

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

PERCENTAGE OF HIGH-INCOME HOUSEHOLDS INCREASES; LOW-INCOME HOUSEHOLDS DECREASE

DISTRIBUTION OF HOUSEHOLDS BY MEDIAN HOUSEHOLD INCOME, ORANGE COUNTY, CALIFORNIA, AND THE UNITED STATES, 2022

Orange County values (red bars):
- Very Low (Less than $10,000): 4.3%
- Low ($10,000-$24,999): 6.9%
- Low-Moderate ($25,000-$49,999): 12.0%
- Moderate ($50,000-$99,000): 23.7%
- High ($100,000-$199,999): 30.7%
- Very High ($200,000 or More): 22.6%

Legend: United States | California | Orange

Sources: U.S. Census Bureau, American Community Survey, 1-Year Estimates, 2010 through 2022; U.S. Census Bureau, Poverty Thresholds for 2024; California Association of Realtors, First-Time Buyer Housing Affordability Index

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

46,665

Approximate 2024 U.S. poverty threshold for a 4-person household:

$31,200

Eligibility for many support services begins at

<185%

of poverty, or roughly

$57,720

for a 4-person household

2022 median household income in Orange County:

$106,209

Minimum qualifying income for a first-time homebuyer in Orange County in 2024:

$233,700

The number of Orange County households grew

10%

between 2010 & 2022, while the number of households in the "Very High" group grew

196%

The proportion of county households in the 'very low' income category (annual income of $10,000 or less) declined from 4.9 percent in 2021 to 4.3 percent in 2022. While this is lower than both the state average of 4.8 percent and the national average of 5.5 percent, it still represents approximately 46,665 county households and thus a significant number of Orange County residents living in poverty.

At the opposite extreme, the proportion of Orange County households making at least $200,000 per year reached 22.6 percent in 2022, a 3.4 percent year-over-year increase. Orange County has a much higher proportion of these households than the state (18 percent) and nation as a whole (11.5 percent). Approximately 53.3 percent of county households make over $100,000 per year, a much higher figure than state (46.2 percent) and national (37.1 percent) averages.

OC MEDIAN HOUSEHOLD INCOMES REVEAL DISPARITIES

MEDIAN HOUSEHOLD INCOME BY RACE/ETHNICITY IN ORANGE COUNTY, 2022
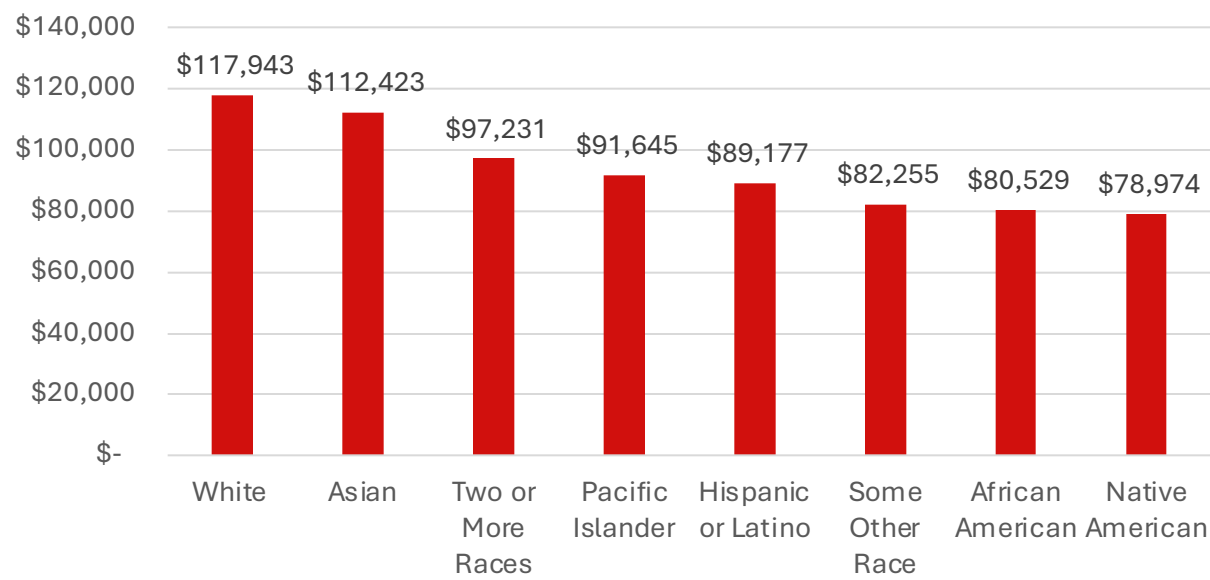
Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates

The chart above illustrates the significant racial and ethnic disparities in Orange County household income. While White and Asian households make, on average, well over $100,000 per year, many other ethnic groups make significantly less. Economic development, workforce development, and entrepreneurial programs tailored at helping close this gap by assisting disadvantaged county residents should be a priority. If successful, these programs will help boost Orange County households, communities, and elevate countywide economic growth.

FAMILY FINANCIAL STABILITY

Only Modest Changes in Family Financial Stability Between 2021 and 2022, but 51% Improvement Since 2012

The Family Financial Stability Index for Orange County (FFSI-OC) measures the financial stability of families with children under age 18 years by Orange County neighborhood. It is a composite of three metrics: family income, employment status, and the proportion of household income spent on rent. Results for the most recent year of data available (2022) are provided in this summary.

MOST RECENT YEAR

The 2022 Family Financial Stability Index for Orange County (FFSI-OC) shows that 19 percent of neighborhoods had low levels of family financial stability (scores of 1, 2, 3, and 4 out of a maximum score of 10, where 1 is the least stable and 10 is the most stable).

1	2	3	4	5	6	7	8	9	10
Least Stable		Unstable		Moderately Stable		Stable		Most Stable	
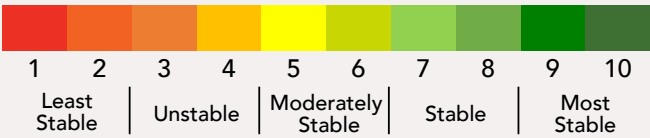
MAJORITY OF OC NEIGHBORHOODS MODERATELY STABLE OR STABLE

Figure 1: FFSI-OC Scores, Percent (and Count) of Orange County Neighborhoods, 2022
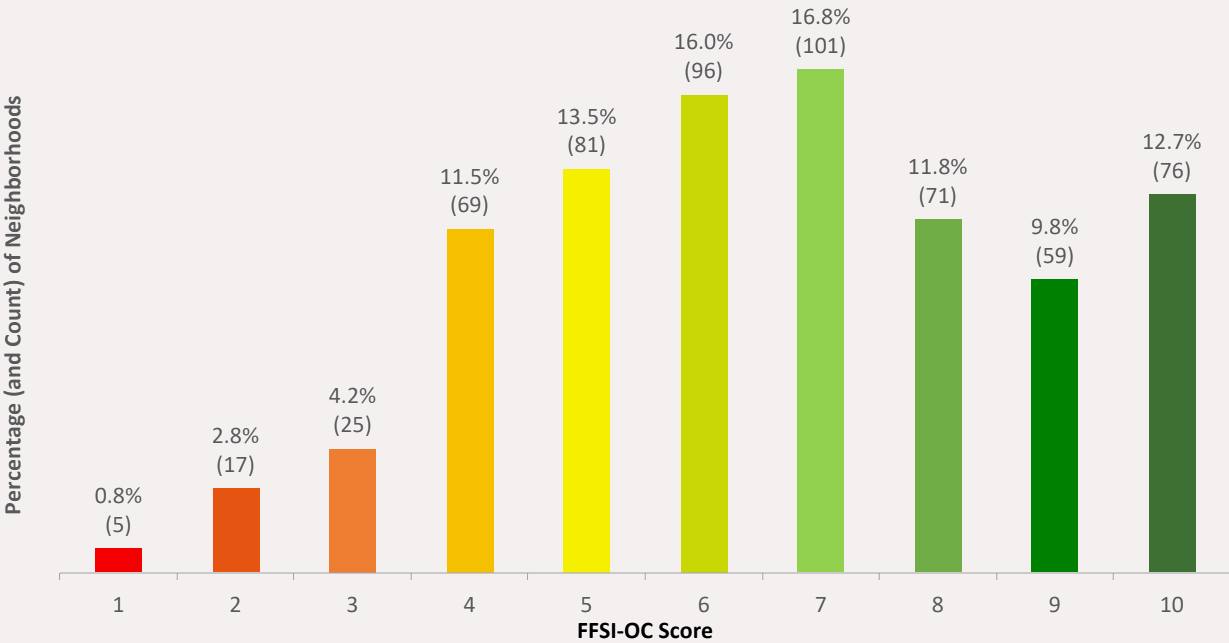
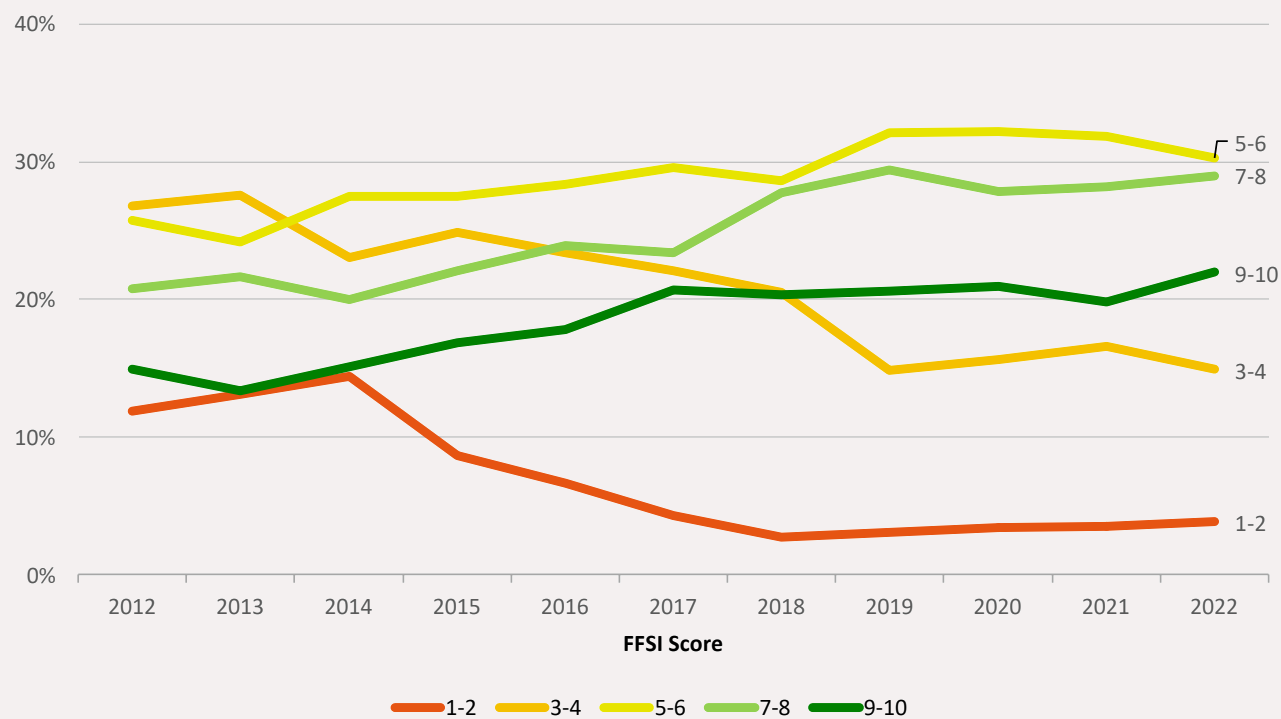Source: Parsons Consulting, Inc. for Orange County United Way

NOTE

Data displayed in Figure 1 are based on 2020 census tract boundaries. Percentages have been rounded. The number of neighborhoods falling within each FFSI-OC index score is provided in the parentheses following the percentage.

TRENDS

While scores have fluctuated from year to year, the long-term trend since 2012 has been one of increasing financial stability in Orange County. The year 2022 marked the highest proportion of stable neighborhoods (scores of 9 or 10); 22 percent of neighborhoods were a part of this category in 2022, compared to only 13 percent in 2012. As seen below, the percentage of neighborhoods at the lowest levels of financial stability plateaued at between three and four percent of all county neighborhoods over the past five years. The proportion of neighborhoods in the next category (scores of 3 or 4) also stabilized in recent years at between 15 and 17 percent.

ORANGE COUNTY FAMILY FINANCIAL STABILITY INCREASES OVER TIME

Figure 2: Percentage of Orange County Neighborhoods by FFSI-OC Score, 2012–2022

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

NOTE

Data displayed in Figure 2 are based on 2010 census tract boundaries.

DATA NOTES

Data for the FFSI are derived from the U.S. Census Bureau American Community Survey 5-Year Estimates. The 2022 results are estimates based on samples of the Orange County population surveyed between 2018 and 2022. As with all sample data, results have a margin of error where the true result is highly likely to be within the margin of error.

For the 2020 Census, the U.S. Census Bureau revised census tract boundaries, creating 30 additional tracts in Orange County as population increases necessitated the splitting of certain tracts. The single year displays of FFSI results (Figures 1 and 3) are based on the analysis of data using the new 2020 census tract boundaries; however, to enable ongoing trend analysis, trend displays (Figures 2 and 4) are based on recombining data to estimate findings for the previous 2010 census tract boundaries. As a consequence, percentages displayed or referenced in Figures 1 and 3 will differ from percentages in Figures 2 and 4.

GEOGRAPHIC ANALYSIS

While neighborhoods with the lowest levels of financial stability (scores of 1 or 2) can be found throughout Orange County, the central part of Orange County represents the greatest concentration of these neighborhoods.

19 PERCENT OF NEIGHBORHOODS HAVE LOW LEVELS OF FAMILY FINANCIAL STABILITY

Figure 3: Family Financial Stability Index – Orange County, 2022 Neighborhood-Level Results
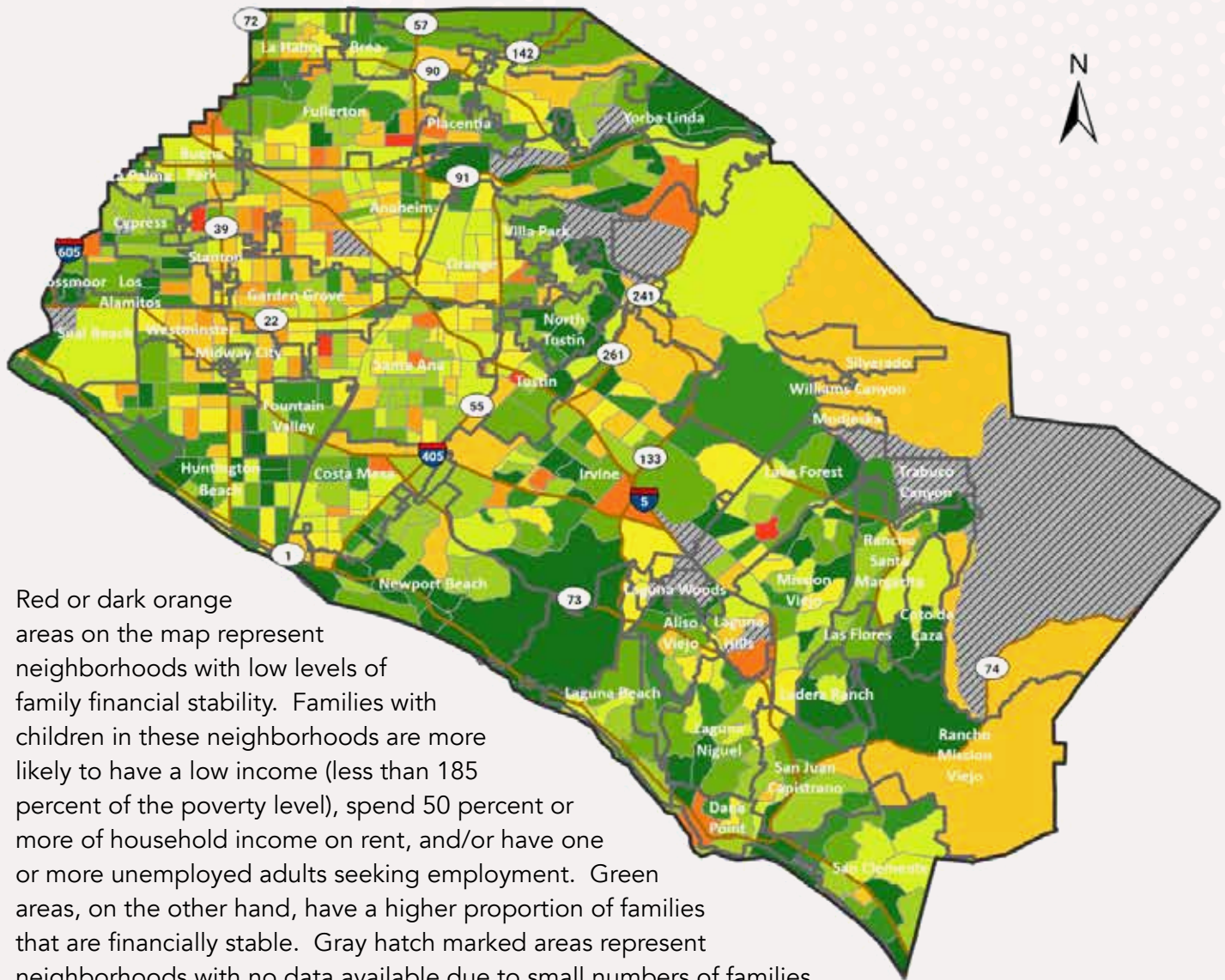
Red or dark orange areas on the map represent neighborhoods with low levels of family financial stability. Families with children in these neighborhoods are more likely to have a low income (less than 185 percent of the poverty level), spend 50 percent or more of household income on rent, and/or have one or more unemployed adults seeking employment. Green areas, on the other hand, have a higher proportion of families that are financially stable. Gray hatch marked areas represent neighborhoods with no data available due to small numbers of families with children in those neighborhoods and thus data have been suppressed to protect privacy.

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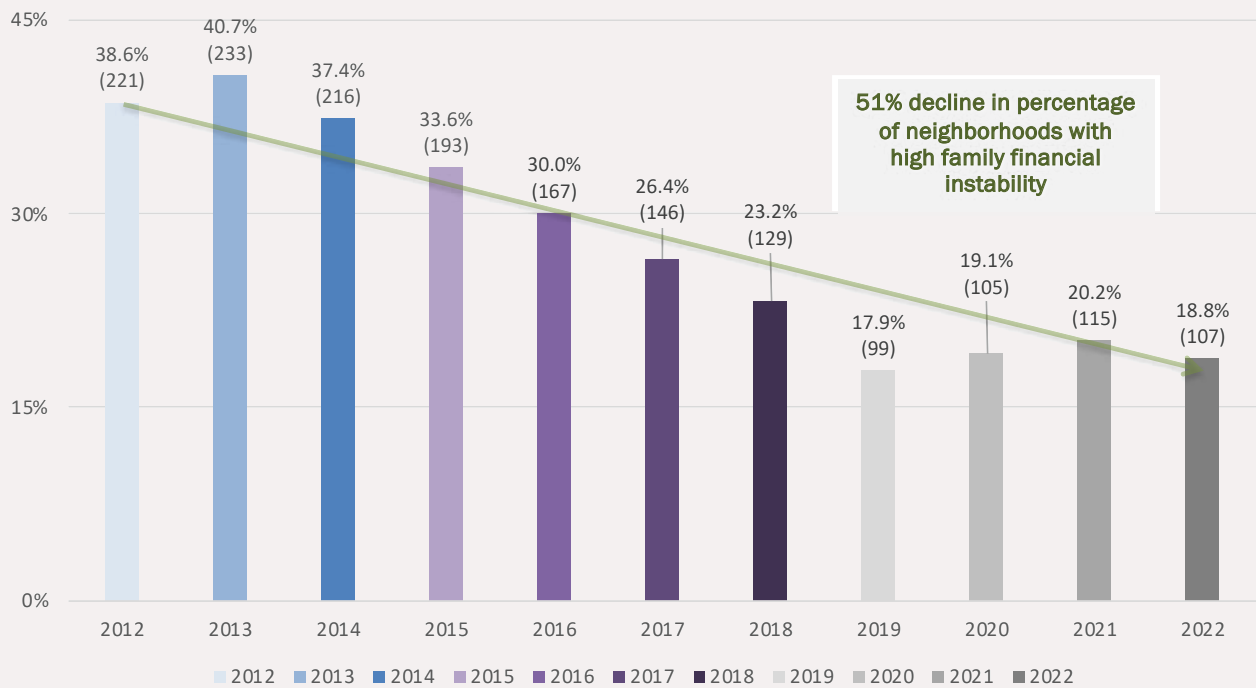
NOTE

Data displayed in Figure 3 are based on 2020 boundaries.

PROGRESS TOWARD *FACE 2024* GOAL

The FFSI-OC is used as a proxy to track Orange County United Way's (OCUW) progress toward their Funding, Advocating, Collaborating, and Educating (FACE) 2024 goal, which is to "reduce the percentage of financially unstable families by 25 percent."[12] For this purpose, "financially unstable" is defined at the neighborhood level as a FFSI-OC score of 4 or lower for a census tract. Between 2012 and 2022, the proportion of financially unstable neighborhoods declined by 51 percent.[13]

OCUW ON TRACK TO DOUBLE *FACE 2024* GOAL

Figure 4: Progress Toward Orange County United Way FACE 2024 Goal; Change in Percentage of Neighborhoods with FFSI-OC Scores of 1 through 4, 2012–2022

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

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NOTE

Data displayed in Figure 4 are based on 2010 census tract boundaries. Numbers of census tracts with FFSI-OC scores of 4 or less are displayed in parentheses. The total number of census tracts included in the analysis changes from year to year due to variation in Census Bureau data suppression to protect confidentiality in tracts with small numbers of households.

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[12] The OCUW FACE 2024 goal aims to reduce the percentage of financially unstable *families*, while the FFSI-OC measures the percentage of *neighborhoods* that have high (or low) concentrations of families experiencing financial instability. The FFSI-OC does not provide a family count, so it cannot provide a precise calculation of change in the number of families that are financially unstable. However, the change in count and percentage of neighborhoods experiencing family financial instability acts as a proxy for a family count.

[13] Due to the variable number of census tracts with data in each year, and because the overall number of census tracts has declined over time due to data suppression on the part of the U.S. Census Bureau to protect privacy, change is calculated on the percentage of neighborhoods scoring 1-4 rather than the count of neighborhoods scoring 1-4.
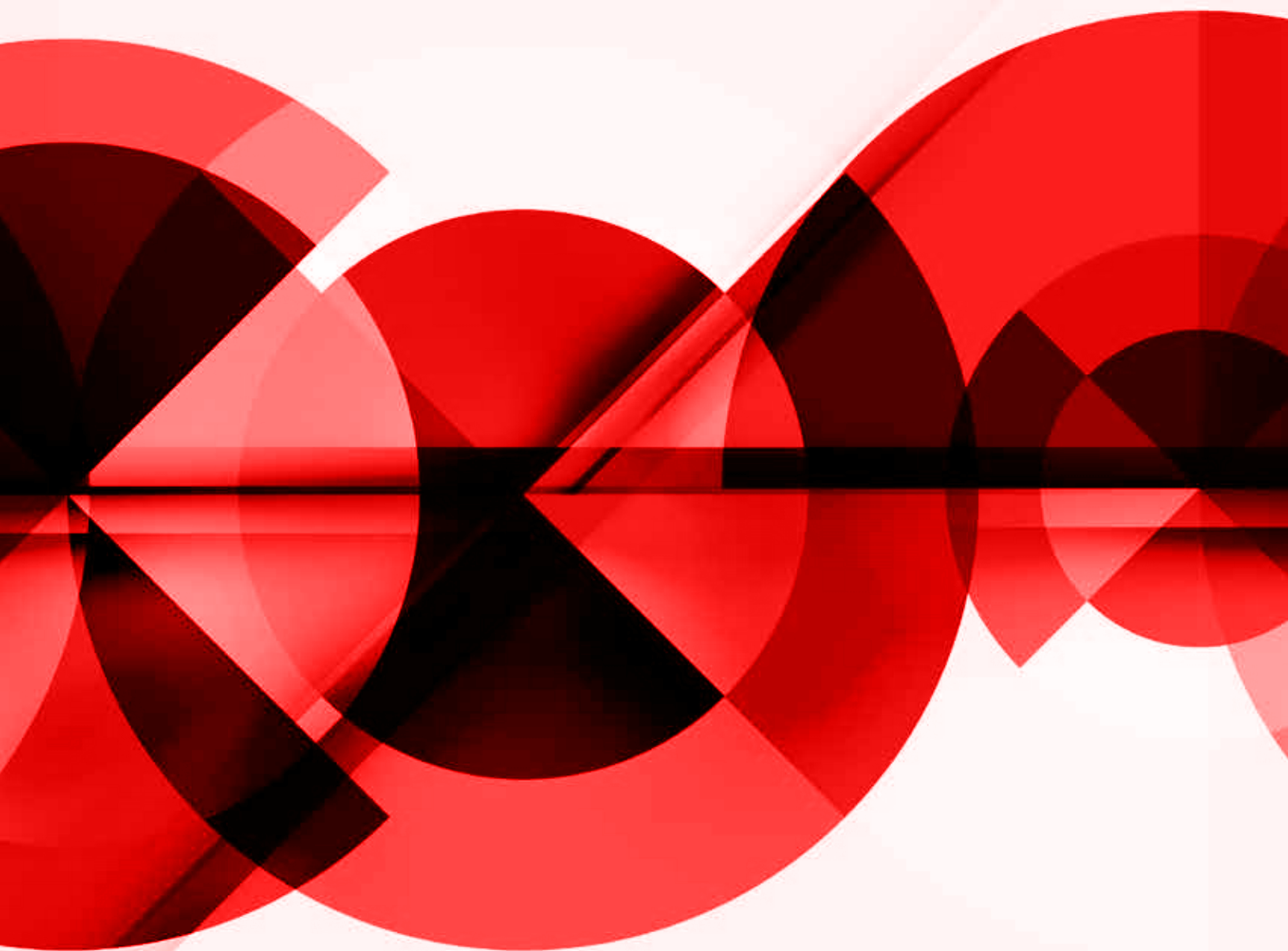
experian.

At Experian, we believe every consumer deserves access to fair and affordable credit. We empower people worldwide to build their credit profiles and take control of their finances, help them access financial services and transform their lives.

experian.com

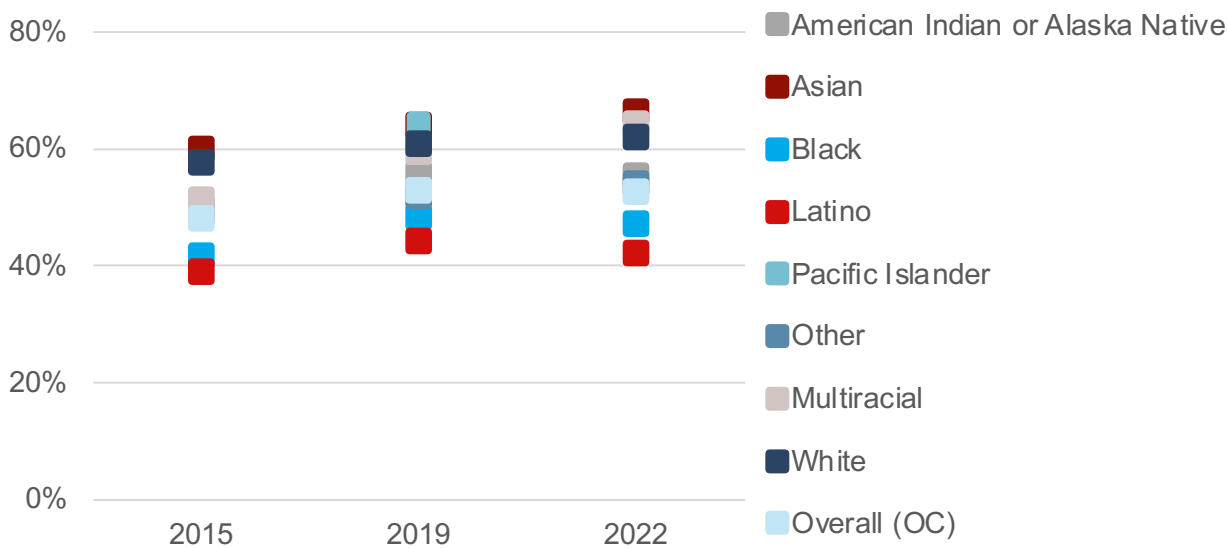# EDUCATION

KINDERGARTEN READINESS

PERCENTAGE OF STUDENTS READY FOR KINDERGARTEN REMAINS STEADY

Supported by First 5 Orange County, the Early Development Index (EDI) measures five areas of children's 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 in all five areas, or on all four areas if only four were completed.

Kindergarten readiness serves as a predictor of future performance as it provides a strong foundation for academic and career growth. In addition, the EDI data shows how our communities are supporting children in getting them ready for school and life. It helps us understand what programs and opportunities are helping and where additional resources are needed to ensure the success of the entire community.

The chart below shows EDI scores by race and ethnicity for the 2015, 2019, and 2022 data collection waves.[14] While overall, 52.7 percent of students were considered ready for kindergarten in 2022, there are significant disparities when the data are disaggregated. At 66.4 percent, Asian students had the highest rate of kindergarten readiness, followed by Multiracial students at 64.2 percent, and White students at 61.9 percent. Approximately 42.2 percent of Hispanic/Latino/a students were considered ready for kindergarten in 2022. This reflects a gap of 24 percentage points between the highest and lowest scores, which has persisted since 2015.

24 PERCENTAGE POINT GAP IN STUDENTS READY FOR KINDERGARTEN BY RACE AND ETHNICITY, 2015, 2019, AND 2022

Legend:
- American Indian or Alaska Native
- Asian
- Black
- Latino
- Pacific Islander
- Other
- Multiracial
- White
- Overall (OC)

Source: First 5 Orange County, Early Development Index

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[14] 2015 data collection includes data collected in 2013, 2014, and 2015; 2019 data collection includes data collected in 2018 and 2019. In 2022, EDI data were collected in one "wave," meaning all the districts and schools participated in the same year. 2015, 2019, and 2022 data waves reflect 100% school participation.

DIFFERENCES IN KINDERGARTEN READINESS EXIST ACROSS ORANGE COUNTY NEIGHBORHOODS

In 2022, over half (52.7 percent) of young children in Orange County were considered ready for kindergarten. This rate varies across the county, with neighborhoods in central Orange County having fewer children considered ready for kindergarten overall.

PERCENTAGE OF STUDENTS READY FOR KINDERGARTEN, EARLY DEVELOPMENT INDEX, 2022
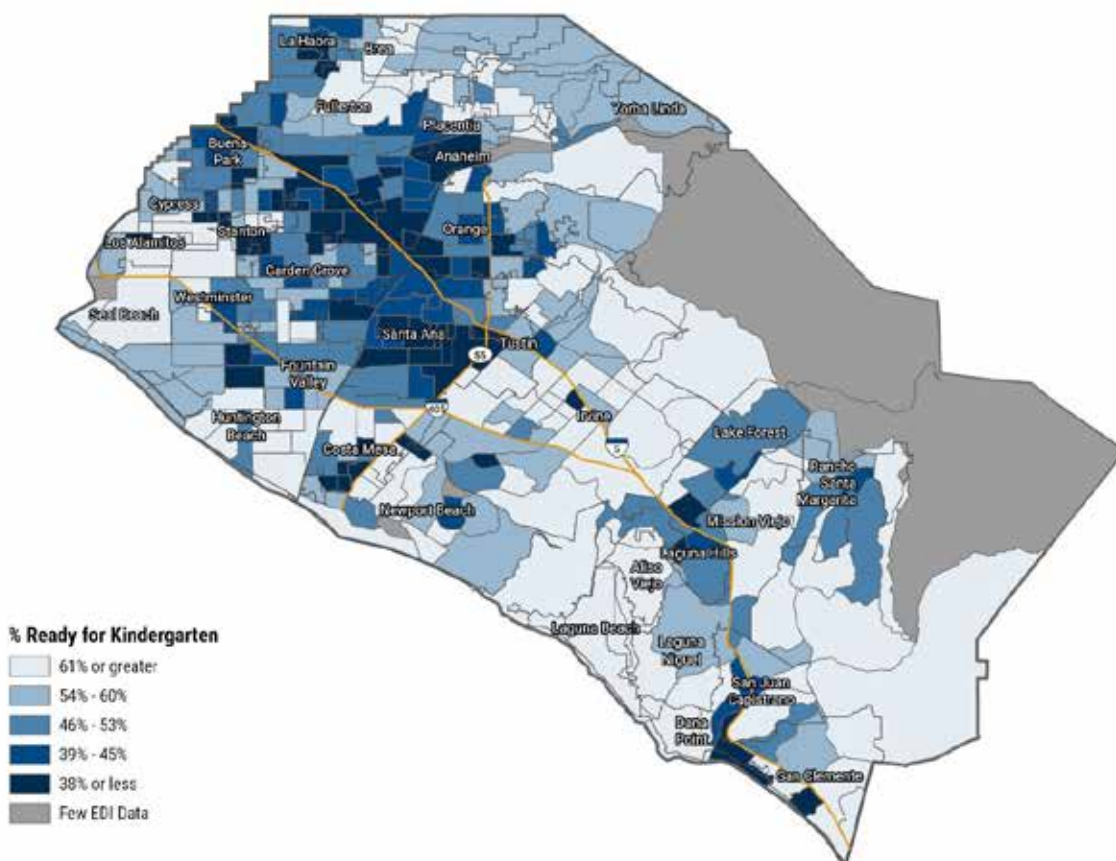
Source: First 5 Orange County, Early Development Index


NOTE

The EDI assists stakeholders in identifying how children are faring developmentally as they enter school. Therefore, data in this map is based on where children live rather than the school (and district) where their data is collected.

The five areas of a child's development are divided into sixteen sub-areas, as listed below. Orange County EDI data from 2022 indicates that communication skills and general knowledge and gross and fine motor skills had the highest percentage of children "not ready for school" at 36.1 percent and 31.8 percent, respectively. While only 10.9 percent of children were not ready on overall social competence with peers, 42.9 percent of the children were somewhat ready on this sub-area.

Children who are "somewhat ready" could benefit from developmentally appropriate activities and interventions to help them become ready for kindergarten. In addition, providing young children with additional support in these sub-areas through developmentally appropriate activities can help maximize the number of students who are developmentally ready for kindergarten.

PERCENT OF STUDENTS READY FOR KINDERGARTEN BY FIVE MAJOR SUB-AREAS, 2022
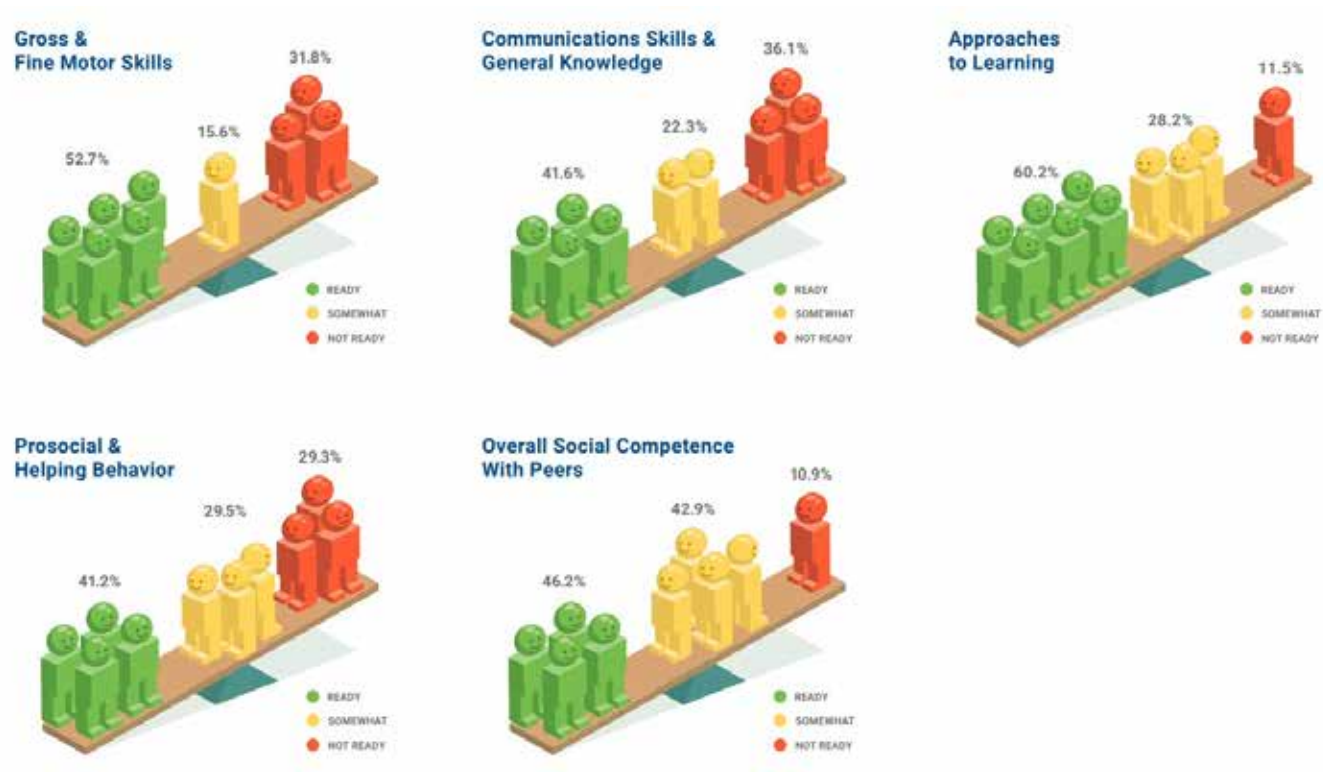
Source: First 5 Orange County, Early Development Index

BELOW IS A GRAPHIC HIGHLIGHTING THE 5 MAJOR AREAS AND 16 SUB-AREAS WHICH HELP TO ASSESS HOW READY STUDENTS ARE FOR KINDERGARTEN

Language & 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 & 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

HIGH SCHOOL GRADUATION RATE

GRADUATION RATES SLIP

GRADUATION RATE BY RACE/ETHNICITY IN ORANGE COUNTY, 2020/2021–2022/2023

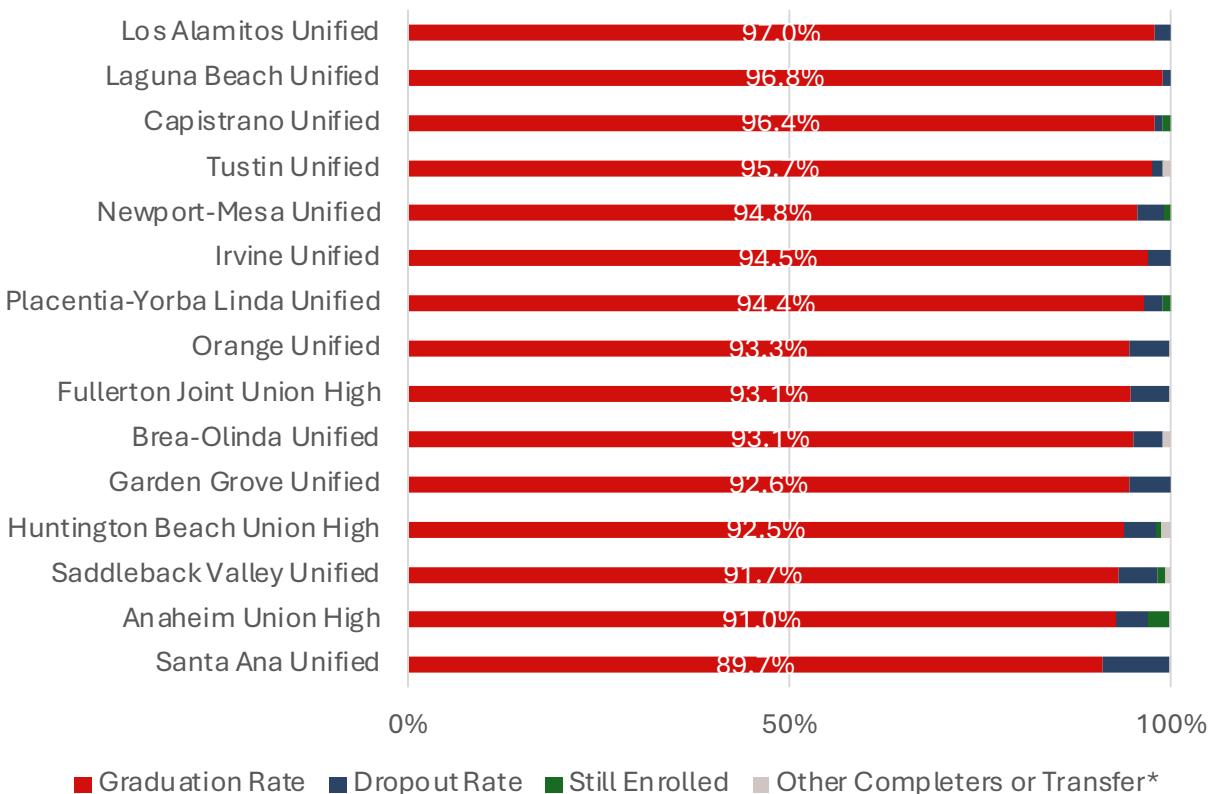|	2020/2021	2021/2022	2022/2023
African American	90.2%	89.2%	87.0%
Asian	95.3%	96.1%	95.5%
Filipino	95.5%	96.1%	95.5%
Hispanic or Latino	87.9%	90.3%	89.5%
Native American	88.2%	88.5%	88.5%
Not Reported	86.3%	83.1%	80.4%
Pacific Islander	88.0%	90.4%	89.3%
Two or More Races	94.3%	94.5%	94.7%
White	94.4%	94.7%	94.1%
Orange County	91.4%	92.7%	91.9%
California	87.7%	90.4%	89.1%
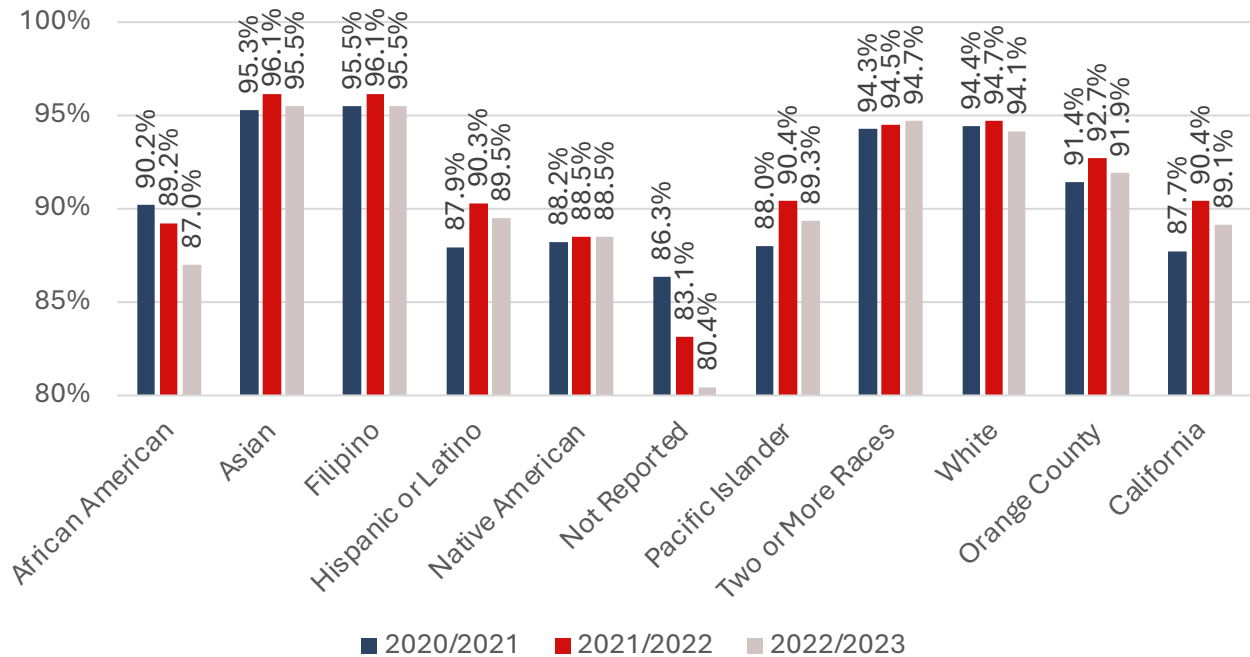
Source: California Department of Education, DataQuest

Approximately 91.9 percent of Orange County students who entered 9th grade in 2019 graduated on time four years later in 2023, a 0.8 percentage point decline compared to the previous school year. Graduation rates declined across nearly all racial and ethnic groups in the county except for students of two or more races, whose performance increased by 0.2 percentage points, and Native American students, whose graduation rates remained the same. The largest declines occurred in students who did not report their race or ethnicity (-2.7 percentage points) and African American students (-2.2 percentage points).

While Orange County's graduation rate remains higher than the state average (89.1 percent in 2022/2023), it does have significant ethnic and racial disparities, as seen above. Working to reverse the county's recent decline in graduation rates as well as addressing these disparities would create a strong educational foundation for the Orange County students' future success.

LOS ALAMITOS UNIFIED GRADUATION RATES TOP OC

HIGH SCHOOL STUDENT OUTCOMES BY ORANGE COUNTY SCHOOL DISTRICT, 2022/2023

District	Graduation Rate
Los Alamitos Unified	97.0%
Laguna Beach Unified	96.8%
Capistrano Unified	96.4%
Tustin Unified	95.7%
Newport-Mesa Unified	94.8%
Irvine Unified	94.5%
Placentia-Yorba Linda Unified	94.4%
Orange Unified	93.3%
Fullerton Joint Union High	93.1%
Brea-Olinda Unified	93.1%
Garden Grove Unified	92.6%
Huntington Beach Union High	92.5%
Saddleback Valley Unified	91.7%
Anaheim Union High	91.0%
Santa Ana Unified	89.7%

Legend: ■ Graduation Rate ■ Dropout Rate ■ Still Enrolled ■ Other Completers or Transfer*

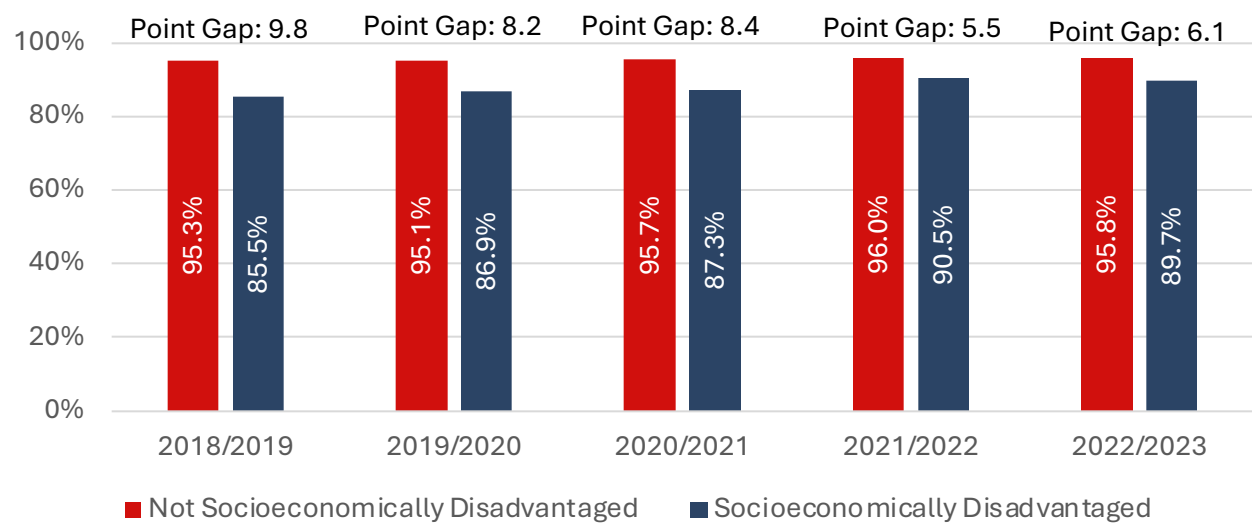Source: California Department of Education, DataQuest
*Includes GED Completers, Other Transfers, Adult H.S. Diploma, Special Education Certificate of Completion, and California High School Proficiency Exam (CHSPE) Completers.

Los Alamitos Unified overtook Laguna Beach Unified as the Orange County school district with the highest graduation rate (97.0 percent). Laguna Beach Unified finished in second at 96.8 percent, followed by Capistrano Unified and Tustin Unified.

Santa Ana Unified had both the county's lowest graduation rate (89.7 percent) and its highest dropout rate (8.6 percent). Garden Grove Unified (5.3 percent), Saddleback Valley Unified (5.0 percent), and Fullerton Joint Union High (5.0 percent) also had relatively high dropout rates. The districts with the largest improvement in graduation rates over the past year included Fullerton Joint Union High (+4.2 percentage points), followed by Newport-Mesa Unified (+3.1 percentage points), and Santa Ana Unified (+1.6 percent). The county's overall dropout rate was 4.8 percent in 2022/2023, well below the state rate of 8.2 percent, but an increase over the previous year's rate of 4.0 percent.

SOCIOECONOMIC STATUS GAP SEES SMALL INCREASE

FOUR-YEAR ADJUSTED COHORT GRADUATION RATE BY SOCIOECONOMIC STATUS, 2018/2019–2022/2023

Point Gap: 9.8   Point Gap: 8.2   Point Gap: 8.4   Point Gap: 5.5   Point Gap: 6.1

Year	Not Socioeconomically Disadvantaged	Socioeconomically Disadvantaged
2018/2019	95.3%	85.5%
2019/2020	95.1%	86.9%
2020/2021	95.7%	87.3%
2021/2022	96.0%	90.5%
2022/2023	95.8%	89.7%

■ Not Socioeconomically Disadvantaged   ■ Socioeconomically Disadvantaged

Source: California Department of Education, DataQuest

After sharply declining 5.5 percentage points in the 2021/2022 school year, the gap in graduation rates between socioeconomically disadvantaged students rose slightly to 6.1 percentage points the next year. Graduation rates declined for both groups, as seen in the chart above.

DATA NOTES

The graduation rate measures the percentage of students who receive a diploma in four years. Data are for non-charter schools only, with the exception of the analysis by socioeconomic status, which includes all schools. A student is considered socioeconomically disadvantaged if both parents have not received a high school diploma, the student is eligible for Free or Reduced-Price Meals, or the student is a migrant, homeless, or foster youth.

COLLEGE READINESS

UC/CSU ELIGIBILITY SEES SMALL IMPROVEMENT

PERCENTAGE OF HIGH SCHOOL GRADUATES THAT ARE UC/CSU ELIGIBLE IN ORANGE COUNTY, 2012/2013–2022/2023
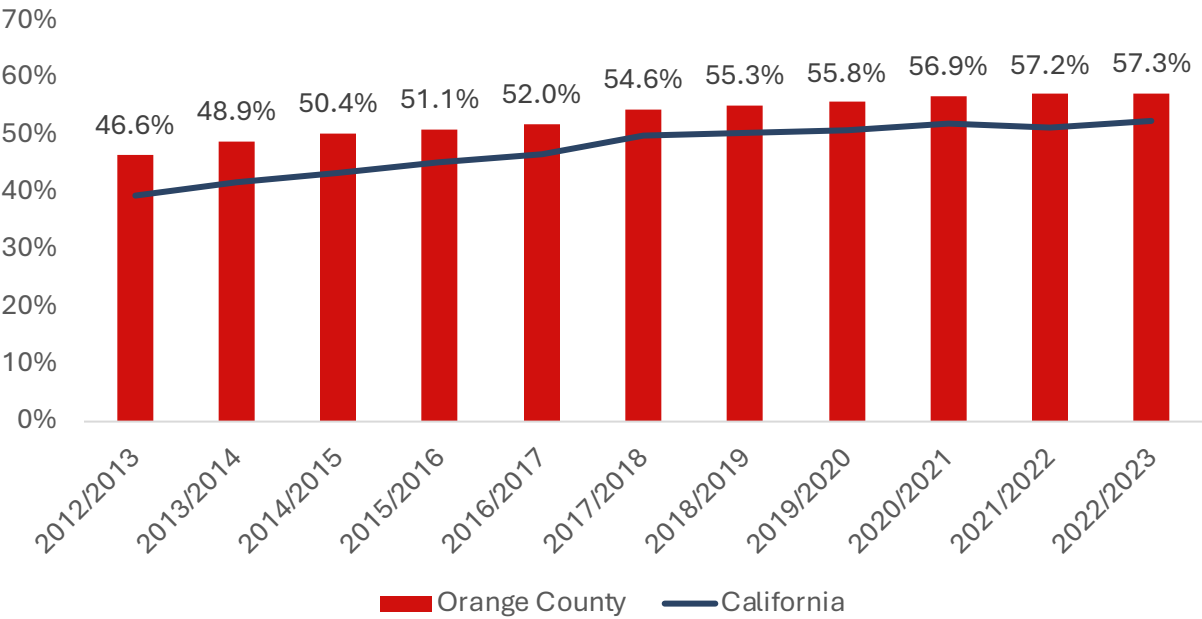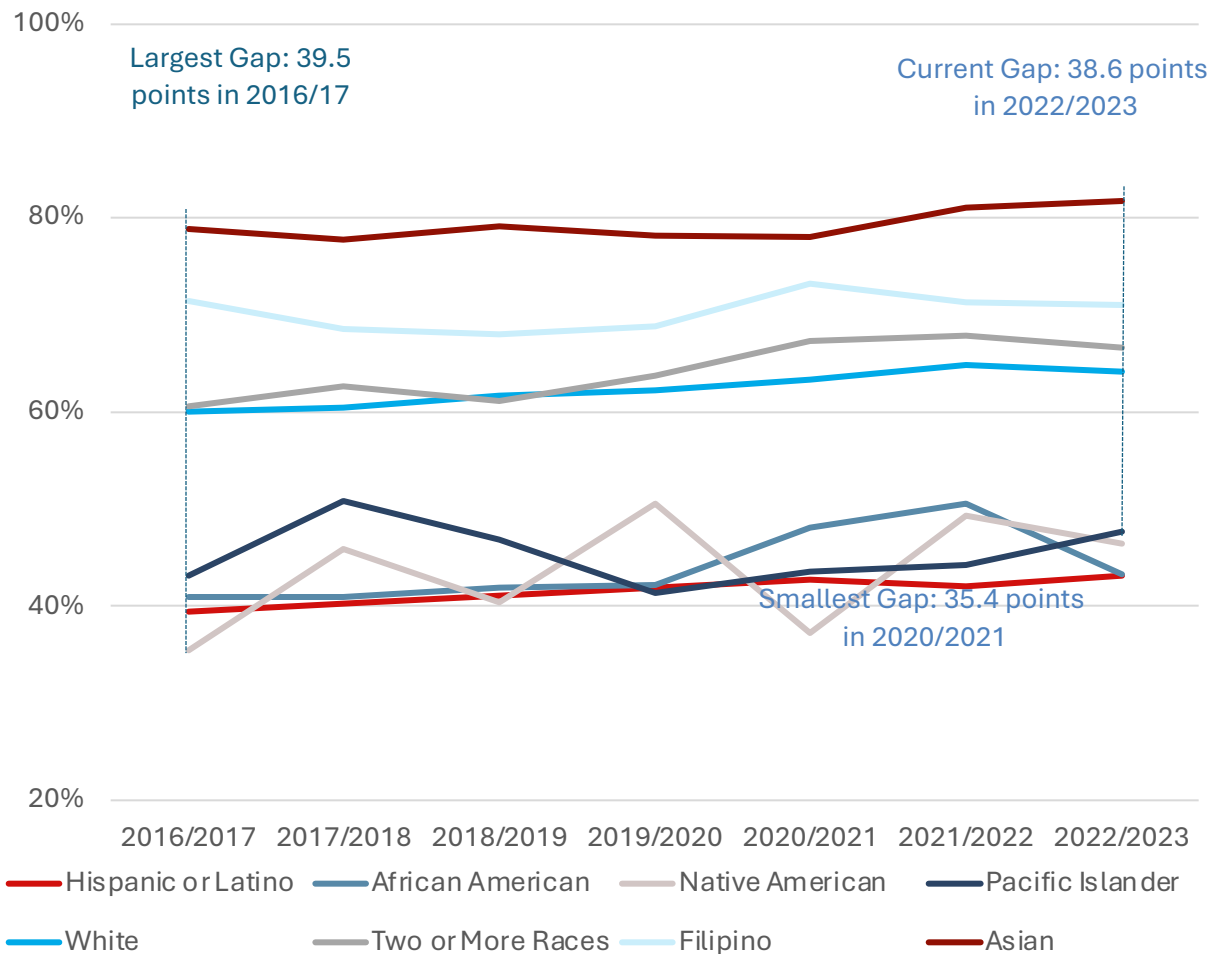

Source: California Department of Education, DataQuest

Orange County's long-term economic success depends on a talent pool of skilled, educated workers, which in turn depends on K-12 education preparing the county's students for success at colleges, universities, and in their careers. The percentage of Orange County high school graduates eligible for entry into University of California (UC) or California State University (CSU) institutions increased slightly from 57.2 percent in 2021/2022 to 57.3 percent in 2022/2023. At the state-level, UC/CSU eligibility saw a larger increase, jumping from 51.4 percent to 52.4 percent year-over-year.

UC/CSU ELIGIBILITY GAP INCREASES

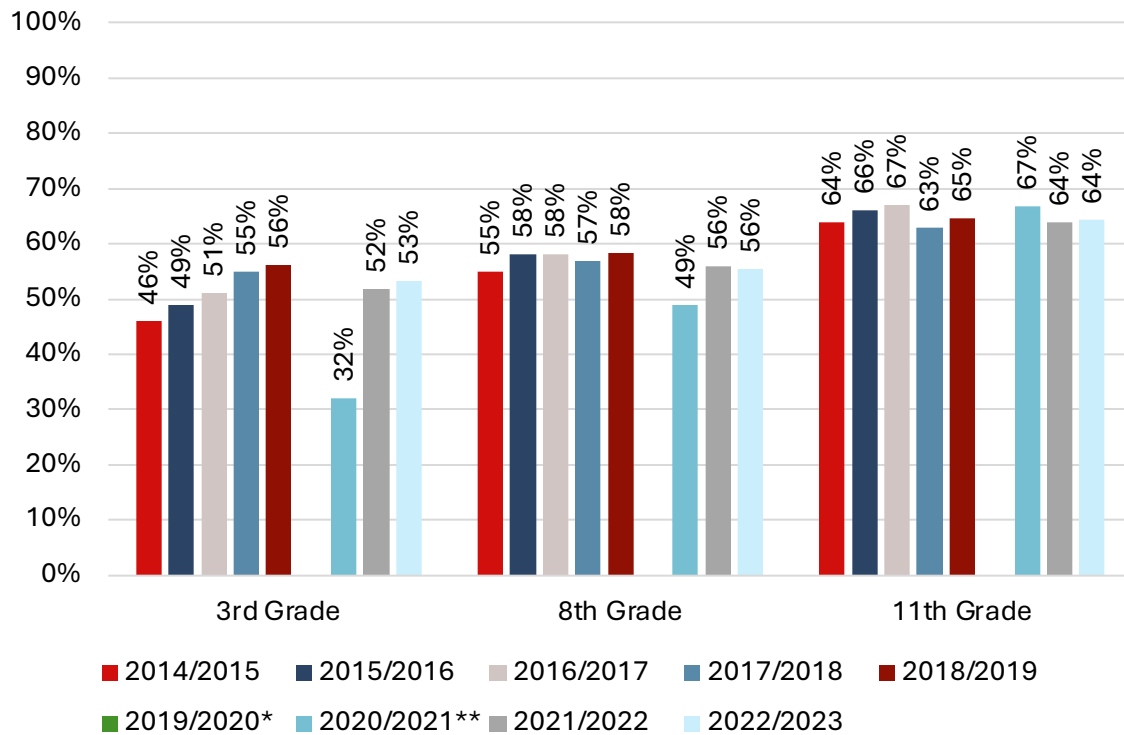## PERCENTAGE OF HIGH SCHOOL GRADUATES ELIGIBLE FOR UC/CSU BY RACE/ETHNICITY IN ORANGE COUNTY, 2016/2017–2022/2023

Largest Gap: 39.5 points in 2016/17

Current Gap: 38.6 points in 2022/2023

Smallest Gap: 35.4 points in 2020/2021

Legend:
- Hispanic or Latino
- African American
- Native American
- Pacific Islander
- White
- Two or More Races
- Filipino
- Asian

Source: California Department of Education, DataQuest

As with socioeconomic gaps in high school graduation rates, Orange County must also work to close gaps in UC/CSU eligibility in order to improve educational equity. In 2022/2023, there was a significant disparity between Asian students, the county's highest performing group at 81.7 percent, and Hispanic or Latino students, who had an eligibility rate of 43.1 percent; this gap grew by 3.2 percentage points over the previous year.

ACADEMIC PERFORMANCE: LITERACY

LITERACY IMPROVES FOR 3RD GRADERS; 8TH AND 11TH GRADERS SEE NO CHANGE

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING ELA STANDARDS, 2014/2015–2022/2023

Legend:
- 2014/2015
- 2015/2016
- 2016/2017
- 2017/2018
- 2018/2019
- 2019/2020*
- 2020/2021**
- 2021/2022
- 2022/2023

3rd Grade: 46%, 49%, 51%, 55%, 56%, 32%, 52%, 53%
8th Grade: 55%, 58%, 58%, 57%, 58%, 49%, 56%, 56%
11th Grade: 64%, 66%, 67%, 63%, 65%, 67%, 64%, 64%

* 2019/2020 results are not available due to the suspension of testing as a result of the novel coronavirus disease 2019 (COVID-19).
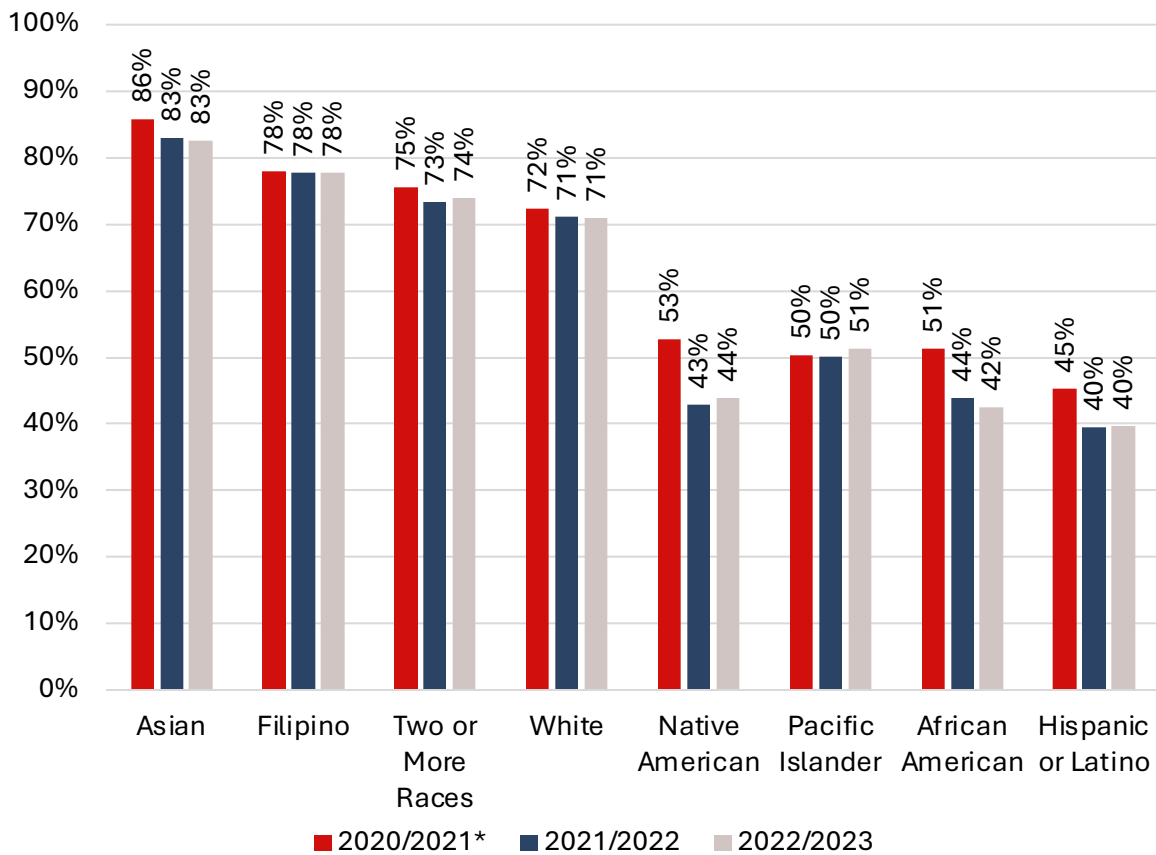
** Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020/2021 varied. Care should be used when interpreting results.
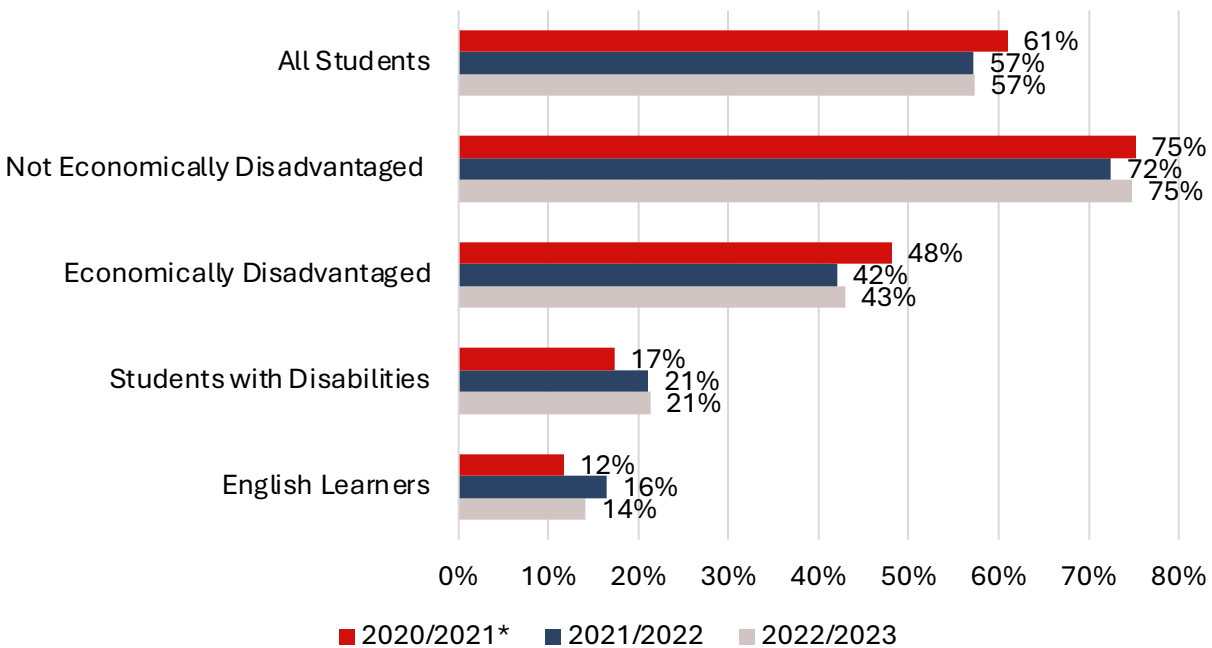
Source: California Department of Education; California Assessment of Student Performance and Progress (CAASPP)

The proportion of Orange County 3rd graders meeting or exceeding state standards in English Language Arts (ELA) marginally improved over the past year, from 55 percent in 2021/2022 to 56 percent in 2022/2023. As seen above, the performances of both 8th and 11th graders remained steady over that same time period, as did the percentage (57 percent) of all surveyed students.

ELA PERFORMANCE UNEVEN ACROSS RACIAL/ETHNIC GROUPS

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING ELA STANDARDS BY RACE/ETHNICITY, 2020/2021–2022/2023

Race/Ethnicity	2020/2021*	2021/2022	2022/2023
Asian	86%	83%	83%
Filipino	78%	78%	78%
Two or More Races	75%	73%	74%
White	72%	71%	71%
Native American	53%	43%	44%
Pacific Islander	50%	50%	51%
African American	51%	44%	42%
Hispanic or Latino	45%	40%	40%

■ 2020/2021*   ■ 2021/2022   ■ 2022/2023

Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020/2021 varied. Care should be used when interpreting results.
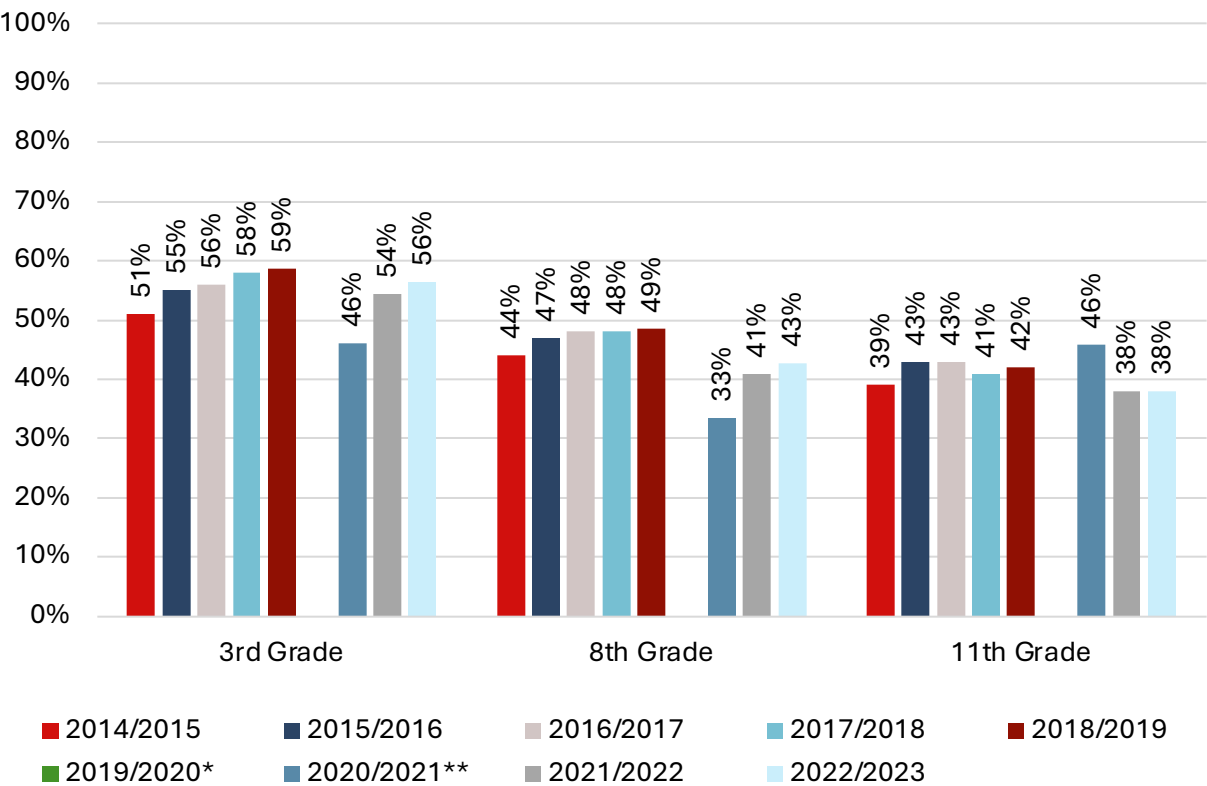*Source: California Department of Education;*
California Assessment of Student Performance and Progress (CAASPP); data is for all grades.

Orange County's Asian and Filipino students have the highest ELA performance, while Pacific Islander, Native American, and students who identify as 'two or more races' saw year-over-year improvements. All other ethnic groups were either stable or declined slightly.

ENGLISH LEARNERS SEE DROP IN PERFORMANCE

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING ELA STANDARDS BY ECONOMIC STATUS, DISABILITY, AND ENGLISH LEARNERS, 2020/2021–2022/2023

All Students
- 61% (2020/2021*)
- 57% (2021/2022)
- 57% (2022/2023)

Not Economically Disadvantaged
- 75% (2020/2021*)
- 72% (2021/2022)
- 75% (2022/2023)

Economically Disadvantaged
- 48% (2020/2021*)
- 42% (2021/2022)
- 43% (2022/2023)

Students with Disabilities
- 17% (2020/2021*)
- 21% (2021/2022)
- 21% (2022/2023)

English Learners
- 12% (2020/2021*)
- 16% (2021/2022)
- 14% (2022/2023)

Legend: ■ 2020/2021* ■ 2021/2022 ■ 2022/2023

* Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020/2021 varied.
Care should be used when interpreting results.
Source: California Department of Education;
California Assessment of Student Performance and Progress (CAASPP)

Overall ELA performance remained largely unchanged: 57 percent of county students met or exceeded state standards in 2021/2022 and in 2022/2023. Rates increased for both socioeconomically disadvantaged students (from 42 percent to 43 percent) and non-disadvantaged students (from 72 percent to 75 percent). The performance of students with disabilities remained consistent at 21 percent while the performance of English Learners declined from 16 percent to 14 percent. The gaps between these figures, as illustrated above, speak to the need for additional investment into programs and services for underserved Orange County students.

ACADEMIC PERFORMANCE: MATHEMATICS

ORANGE COUNTY 3RD AND 8TH GRADERS PERFORM BETTER IN MATH; 11TH GRADERS REMAIN CONSISTENT

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING MATHEMATICS STANDARDS, 2014/2015–2022/2023
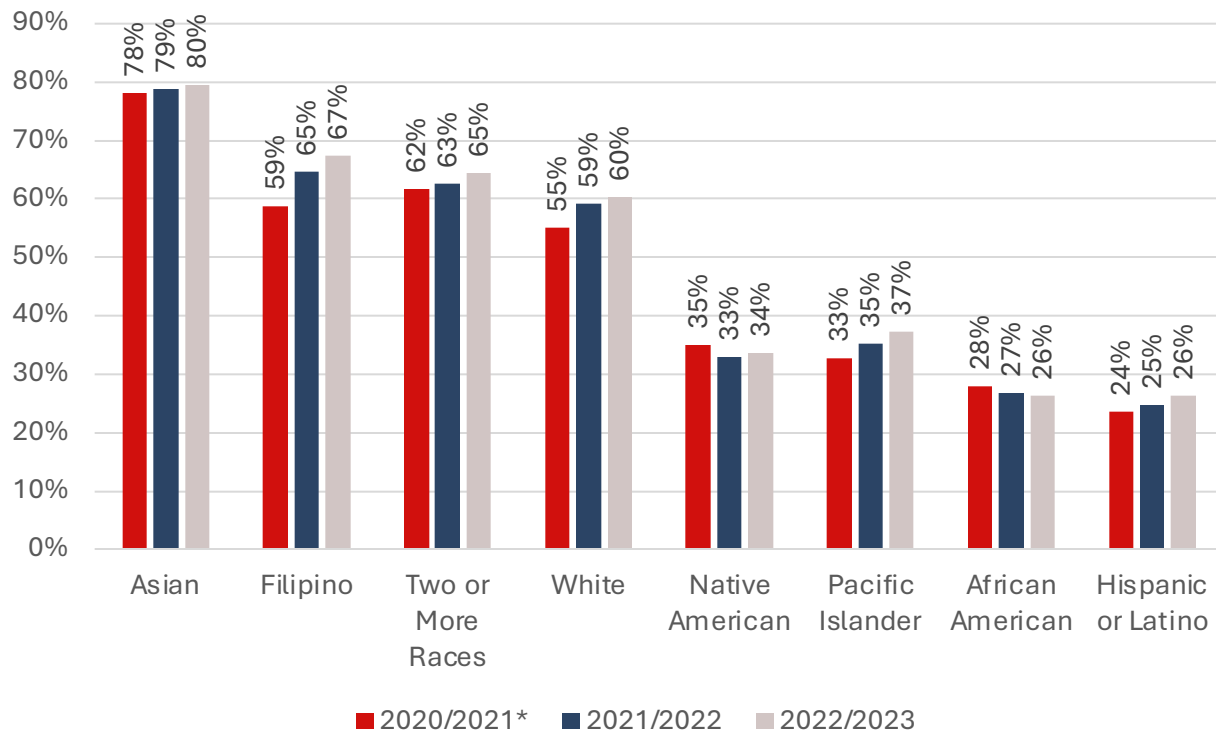

Legend:
- 2014/2015
- 2015/2016
- 2016/2017
- 2017/2018
- 2018/2019
- 2019/2020*
- 2020/2021**
- 2021/2022
- 2022/2023

3rd Grade: 51%, 55%, 56%, 58%, 59%, 46%, 54%, 56%
8th Grade: 44%, 47%, 48%, 48%, 49%, 33%, 41%, 43%
11th Grade: 39%, 43%, 43%, 41%, 42%, 46%, 38%, 38%

* 2019/2020 results are not available due to the suspension of testing as a result of the novel coronavirus disease 2019 (COVID-19).
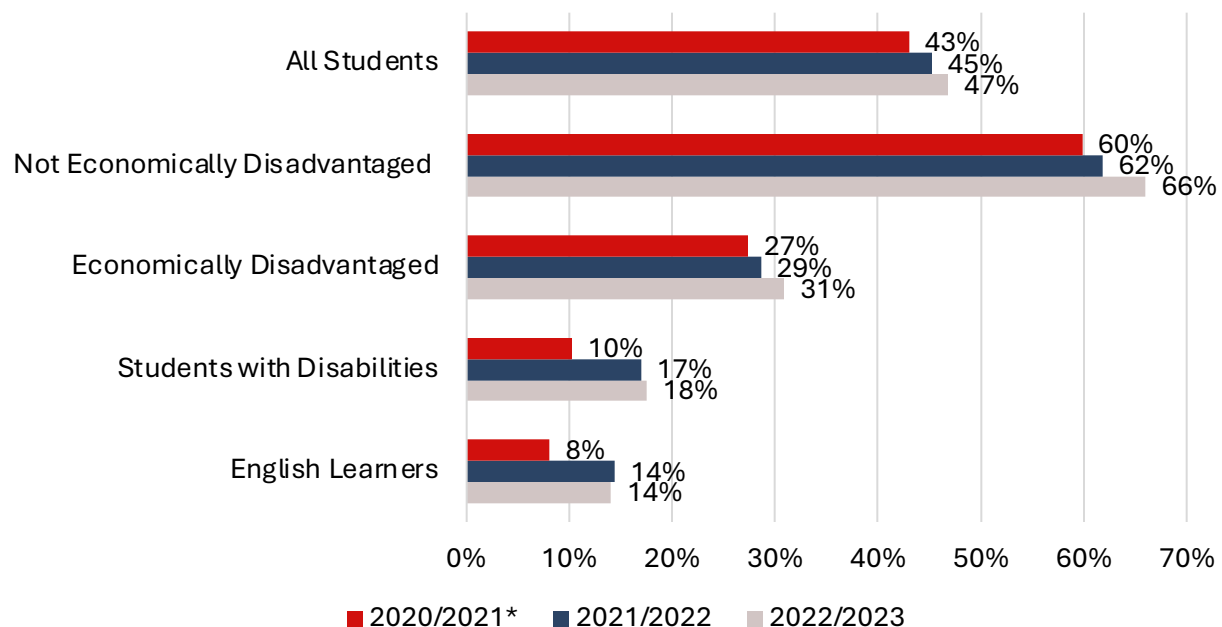*** Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020/2021 varied. Care should be used when interpreting results.*
Source: California Department of Education; California Assessment of Student Performance and Progress (CAASPP)
.

Orange County students made progress between 2021/2022 and 2022/2023. The percentage of 3rd graders meeting or exceeding Mathematics standards increased from 54 percent to 56 percent while the percentage of 8th graders increased from 41 percent to 43 percent. 11th graders' performance remained consistent at 38 percent. Overall, 47 percent of all students in Orange County met or exceeded state standards in Mathematics.

NEARLY ALL ETHNIC GROUPS SEE IMPROVED MATH PERFORMANCE

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING MATHEMATICS STANDARDS BY RACE/ETHNICITY, 2020/2021–2022/2023

Race/Ethnicity	2020/2021*	2021/2022	2022/2023
Asian	78%	79%	80%
Filipino	59%	65%	67%
Two or More Races	62%	63%	65%
White	55%	59%	60%
Native American	35%	33%	34%
Pacific Islander	33%	35%	37%
African American	28%	27%	26%
Hispanic or Latino	24%	25%	26%

* Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020-2021 varied.
*Care should be used when interpreting results.*
Source: California Department of Education;
California Assessment of Student Performance and Progress (CAASPP); data is for all grades.

As seen above, the Mathematics performances of all racial and ethnic groups improved, except for African American students which saw performance decline from 27 percent to 26 percent. Filipino students saw the largest improvement, with 67 percent of students meeting or exceeding standards in 2022/2023 compared to 65 percent in the previous school year. Pacific Islander students saw the second largest performance improvement, followed by students of two or more races.

ALL GROUPS SEE EITHER IMPROVED OR STABLE PERFORMANCE

PERCENTAGE OF ORANGE COUNTY STUDENTS MEETING OR EXCEEDING MATHEMATICS STANDARDS BY ECONOMIC STATUS AND ENGLISH LEARNERS, 2020/2021–2022/2023

All Students
- 2020/2021*: 43%
- 2021/2022: 45%
- 2022/2023: 47%

Not Economically Disadvantaged
- 2020/2021*: 60%
- 2021/2022: 62%
- 2022/2023: 66%

Economically Disadvantaged
- 2020/2021*: 27%
- 2021/2022: 29%
- 2022/2023: 31%

Students with Disabilities
- 2020/2021*: 10%
- 2021/2022: 17%
- 2022/2023: 18%

English Learners
- 2020/2021*: 8%
- 2021/2022: 14%
- 2022/2023: 14%

■ 2020/2021*   ■ 2021/2022   ■ 2022/2023

* Due to factors surrounding the novel coronavirus (COVID-19) pandemic, testing participation in 2020/2021 varied. Care should be used when interpreting results.
Source: California Department of Education; California Assessment of Student Performance and Progress (CAASPP)

The performance of non-socioeconomically disadvantaged students increased from 62 percent to 66 percent; the percentage of socioeconomically disadvantaged students meeting or exceeding standards also increased, from 29 percent to 31 percent. Performance on mathematics standards of English Learners remained steady at 14 percent.

STEM-RELATED DEGREES

TOTAL NUMBER OF STEM DEGREES DECLINES IN 2023

STEM-RELATED BACHELOR'S DEGREES CONFERRED AT ORANGE COUNTY COLLEGES AND UNIVERSITIES, 2013–2023
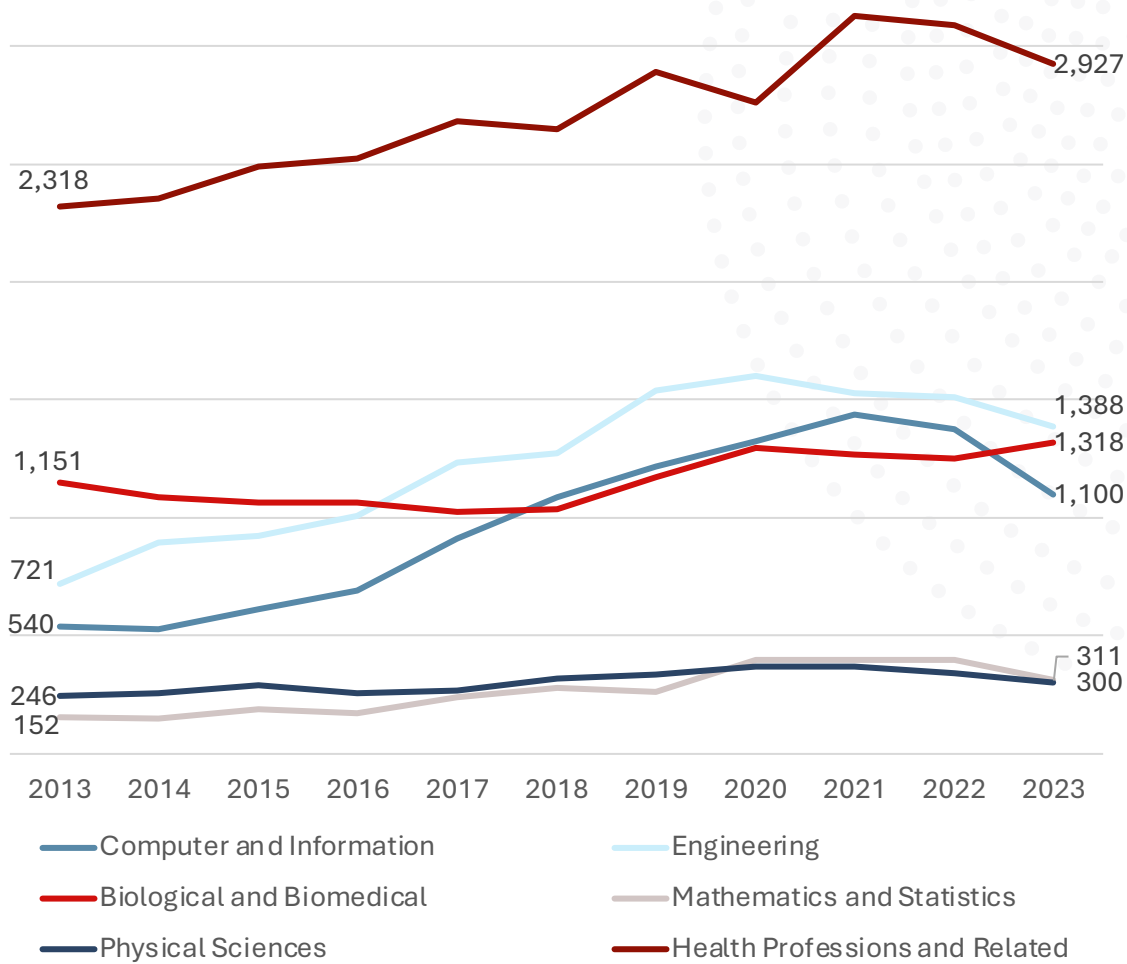
Source: Lightcast

The total number of STEM-related degrees granted by Orange County academic institutions declined by 1.7 percent, from 2022's total of 15,742 to 2023's total of 15,471. This mirrors a similar but even larger decline in total degrees granted in Orange County, which fell from 61,826 to 59,108 (a drop of 4.4 percent) over the same period. Because STEM degrees declined at a slower rate, they actually increased as a proportion of total degrees granted in the county, from 25.5 percent in 2022 to 26.2 in 2023; this was the largest proportional increase in over a decade.

STEM-related bachelor's degrees in Orange County declined by 5.3 percent from 2022 to 2023. The largest decline occurred in Computer and Information degrees, which fell by 275 or 20 percent. Health Professions and Related degrees also saw a significant decline, by 164 or 5.3 percent. Biological and Biomedical was the only category to see a year-over-year increase; its total rose from 1,250 in 2022 to 1,318 in 2023, a 5.4 percent increase.

STEM-RELATED GRADUATE DEGREES CONFERRED AT ORANGE COUNTY COLLEGES AND UNIVERSITIES, 2013–2023
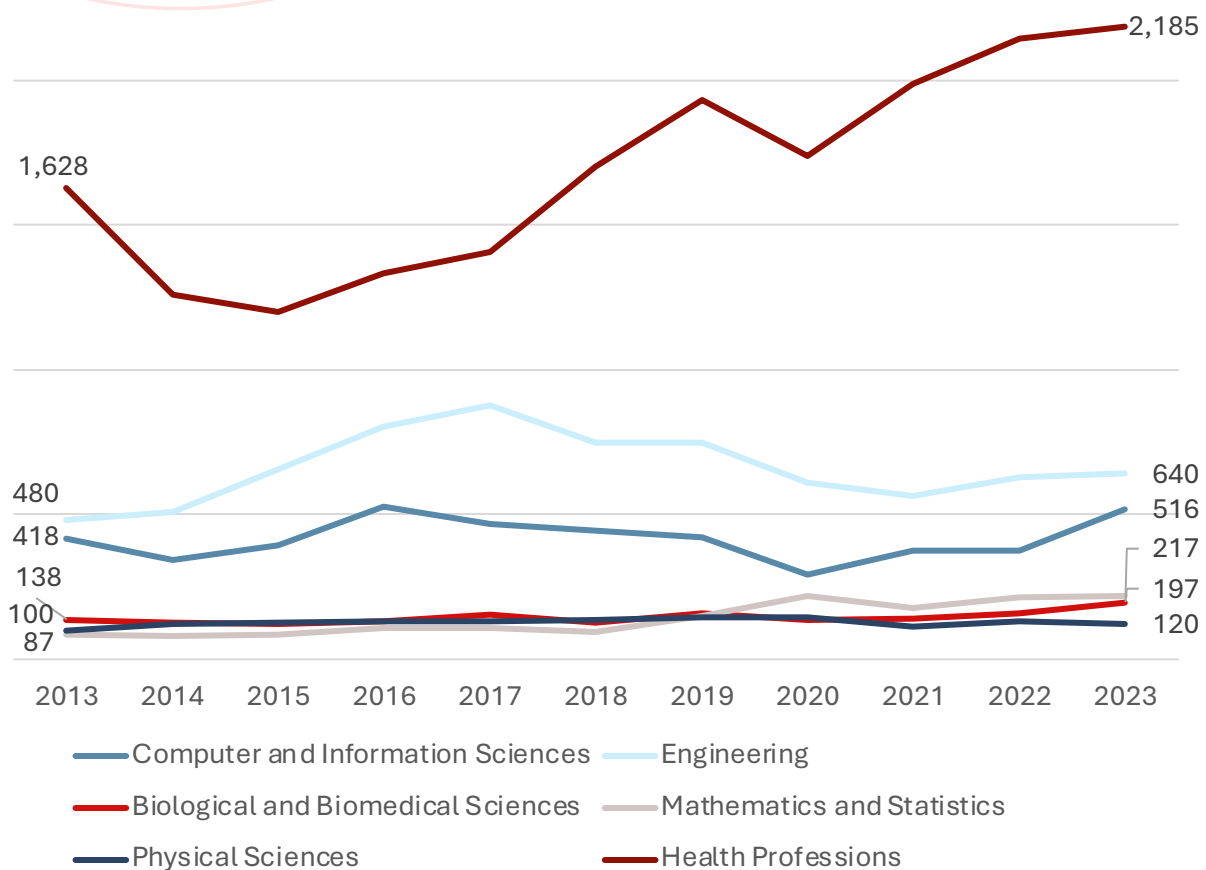
Source: Lightcast

The number of graduate and professional degrees, on the other hand, increased from 2022 to 2023. Only two fields saw declines: Mathematics and Statistics (-5.5 percent) and Physical Sciences (-6.0 percent). Computer and Information saw the largest increase in graduate degrees, as its total rose by 19.1 percent to 516 in 2023.

Overall, the number of STEM-related bachelor's degrees has increased by 43.2 percent since 2013; the number of STEM-related graduate degrees has increased by 35.9 percent.

OC SCHOOLS GRANTED FEWER DEGREES IN 2023

BACHELOR'S AND GRADUATE DEGREES GRANTED AND PROPORTION THAT ARE STEM-RELATED IN ORANGE COUNTY, 2013–2023
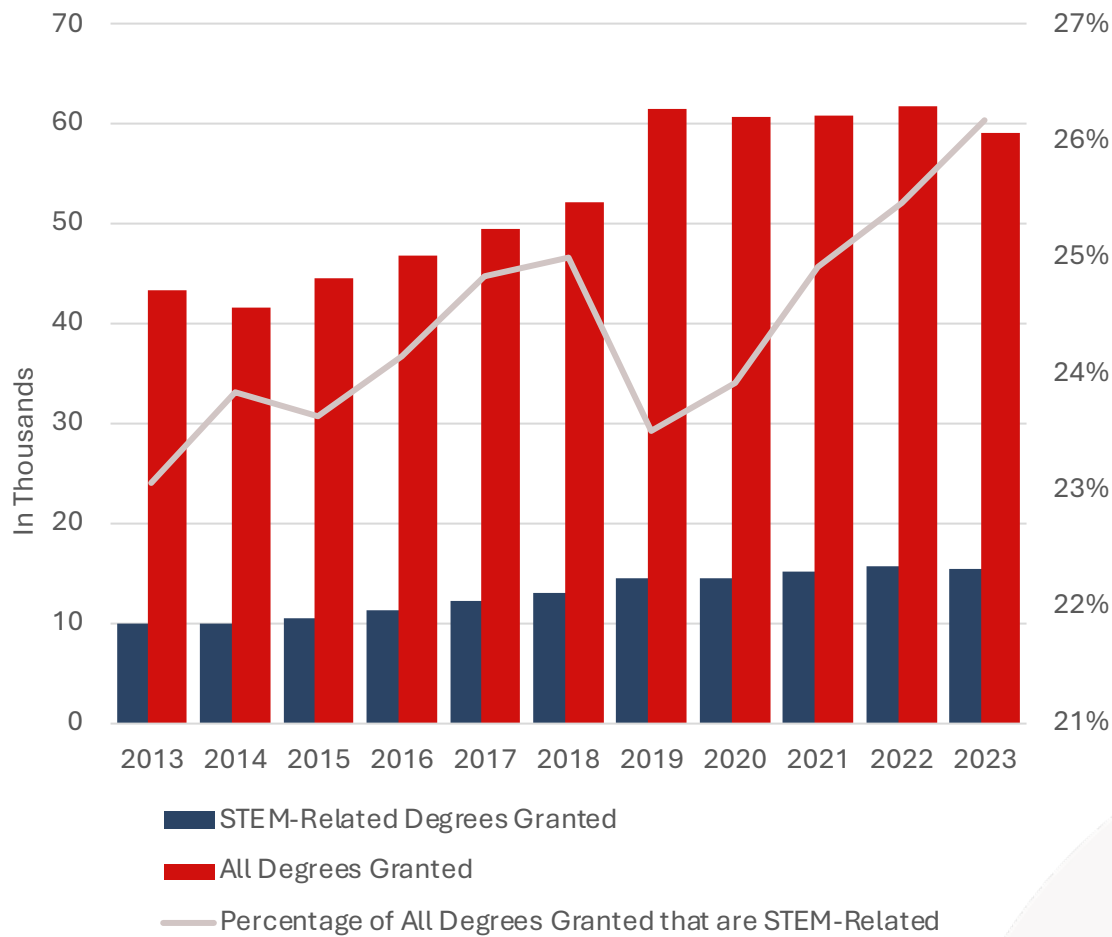
Source: Lightcast

DATA NOTES

"STEM" degrees are those granted in the fields of science, technology, engineering, and mathematics. Data are inclusive of associate's, bachelor's, master's, and doctorate degrees granted at public, private, and for-profit 4-year degree granting institutions in Orange County. Data for 2019 and 2020 should be interpreted with caution due to the impact of COVID-19.
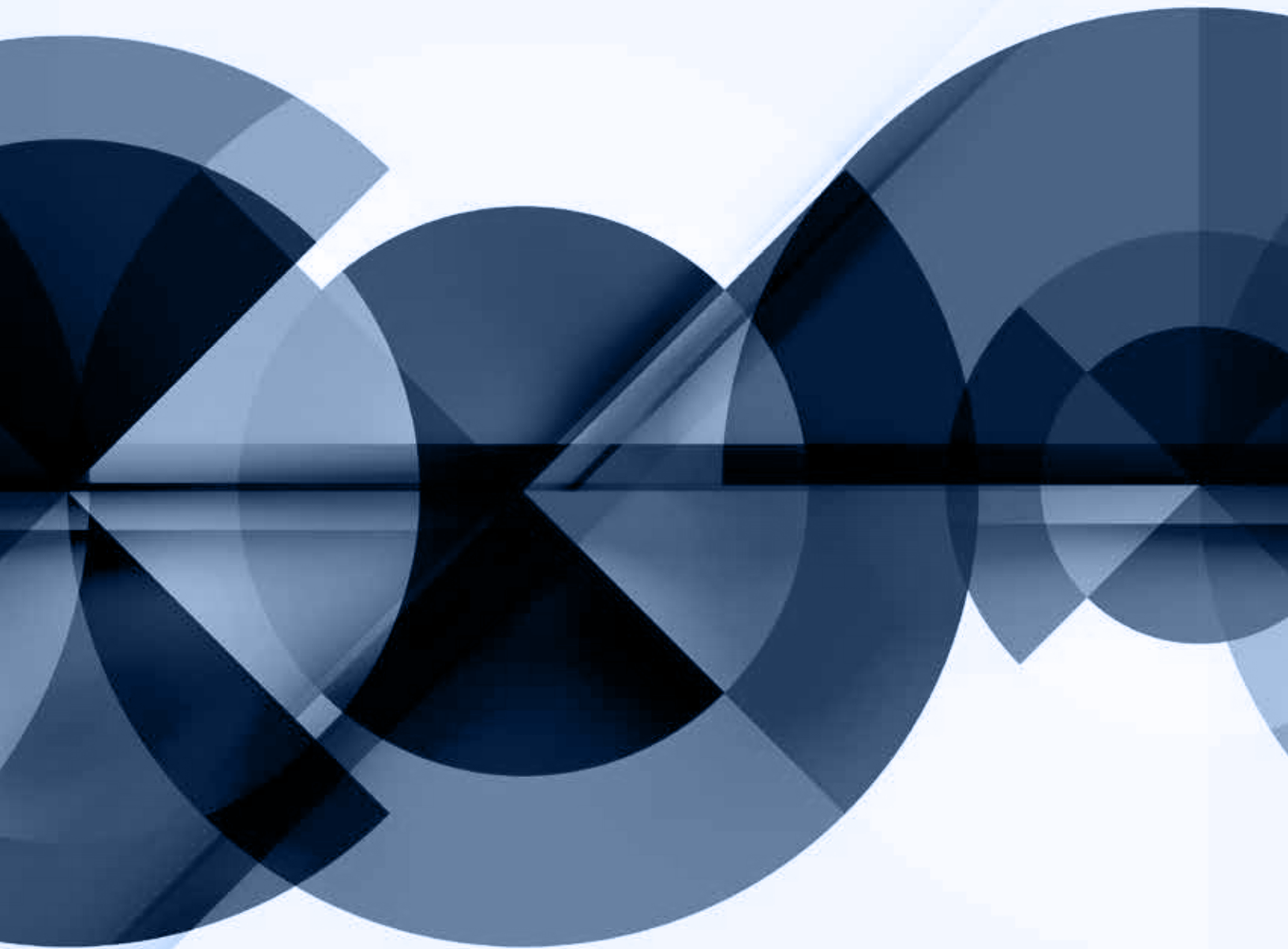
HEALTH CARE ACCESS

OC UNINSURED RATE HITS NEW LOW

UNINSURED (ALL AGES) IN ORANGE COUNTY, CALIFORNIA, AND UNITED STATES, 2012–2022
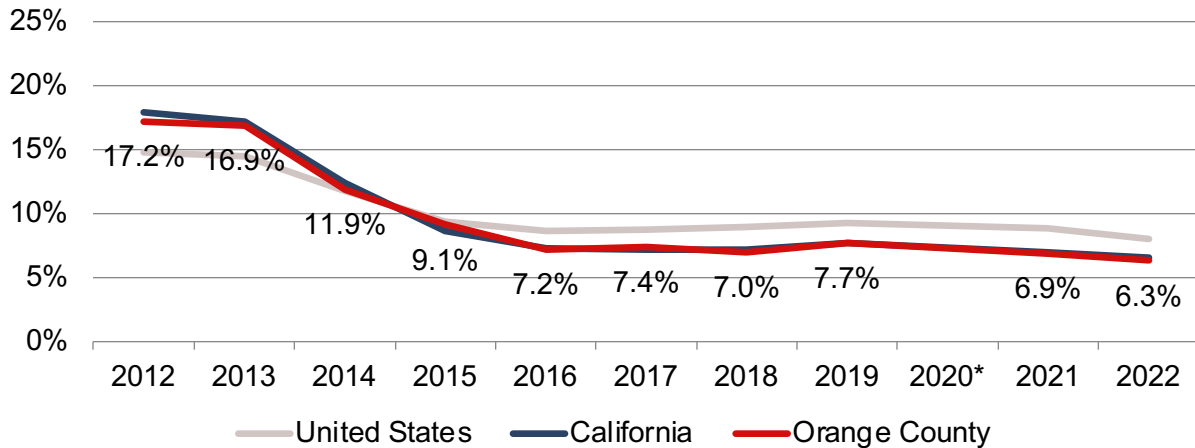
Legend: United States — California — Orange County

Data labels (Orange County): 17.2% (2012), 16.9% (2013), 11.9% (2014), 9.1% (2015), 7.2% (2016), 7.4% (2017), 7.0% (2018), 7.7% (2019), 6.9% (2021), 6.3% (2022)

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates; data for 2020 is unavailable due to COVID-19-related impacts.

The proportion of Orange County residents without health insurance declined from 6.9 percent in 2021 to 6.3 percent in 2022; this rate remains below state and national averages, which are 6.5 percent and 8.0 percent, respectively.

UNINSURED (ALL AGES) IN ORANGE COUNTY AND PEER REGIONS, 2021 AND 2022

County	2021	2022
San Francisco County	3.1%	3.0%
Santa Clara County	3.7%	3.3%
San Diego County	6.7%	6.4%
Orange County	6.9%	6.3%
Riverside County	8.2%	7.4%
San Bernardino County	8.9%	8.1%
Los Angeles County	9.0%	8.2%
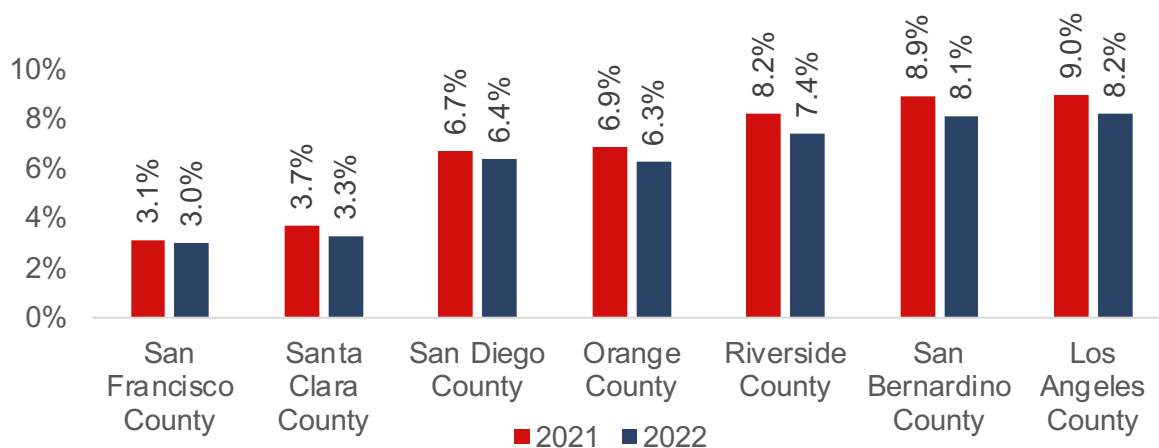
Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates

Orange County's uninsured rate was higher than some neighbors and peers, such as San Francisco County (3.0 percent), Santa Clara County (3.3 percent), and San Diego County (6.4 percent). Other neighboring counties had higher uninsured rates, including Riverside County (7.4 percent), San Bernardino County (8.1 percent), and Los Angeles County (8.2 percent).

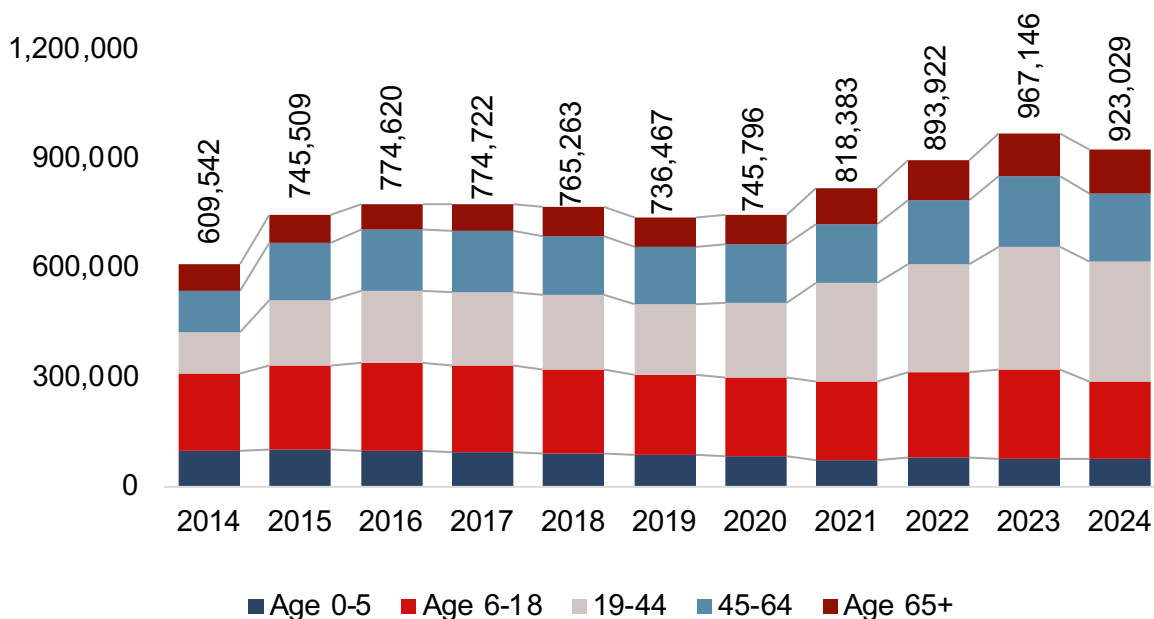## PERCENT UNINSURED IN ORANGE COUNTY BY RACE/ETHNICITY, 2021 AND 2022

	White	African American	Asian	Pacific Islander	Two or More Races	Native American	Hispanic or Latino	Some Other Race
2021	2.9%	3.0%	4.2%	5.0%	9.6%	11.9%	13.4%	17.2%
2022	3.3%	4.9%	3.7%	13.4%	8.5%	9.2%	11.5%	14.4%
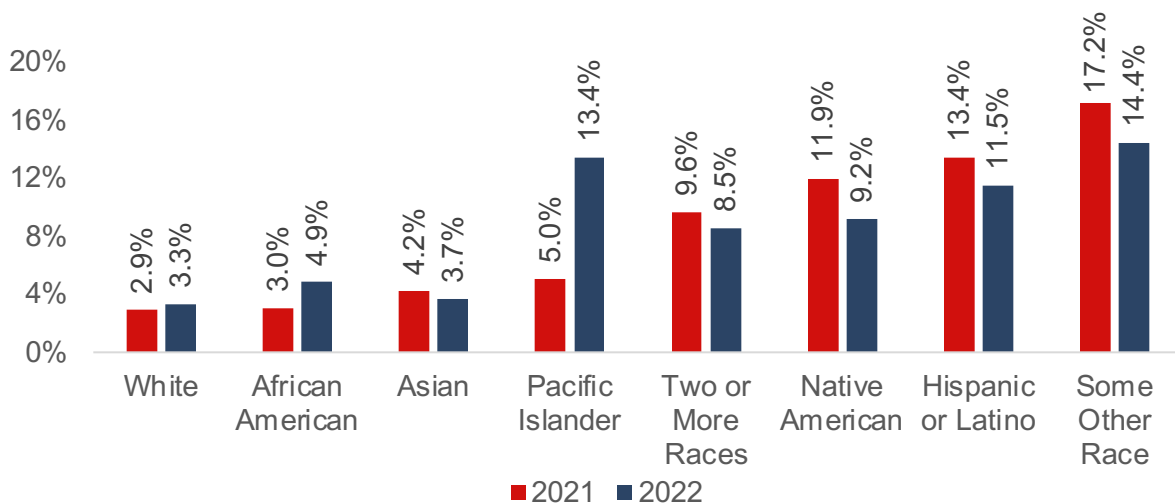
Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates

Within Orange County, White residents had the lowest rate of uninsured residents at 3.3 percent, followed by Asian residents at 3.7 percent, and African American residents at 4.9 percent. Residents identifying as 'some other race' had the highest rate of uninsured residents at 14.4 percent. Pacific Islanders saw the largest increase in the proportion of uninsured residents, growing from 5.0 percent in 2021 to 13.4 percent in 2022. The gap of uninsured residents between White residents and residents who identify as 'some other race' highlights the need for additional efforts and strategies aimed at improving access to health insurance across all races and ethnicities in Orange County.

MEDI-CAL MEMBERSHIP DROPS IN 2024

MEDI-CAL MEMBERSHIP IN ORANGE COUNTY, 2014–2024

Legend: ■ Age 0-5 ■ Age 6-18 ■ 19-44 ■ 45-64 ■ Age 65+

Values: 609,542 | 745,509 | 774,620 | 774,722 | 765,263 | 736,467 | 745,796 | 818,383 | 893,922 | 967,146 | 923,029
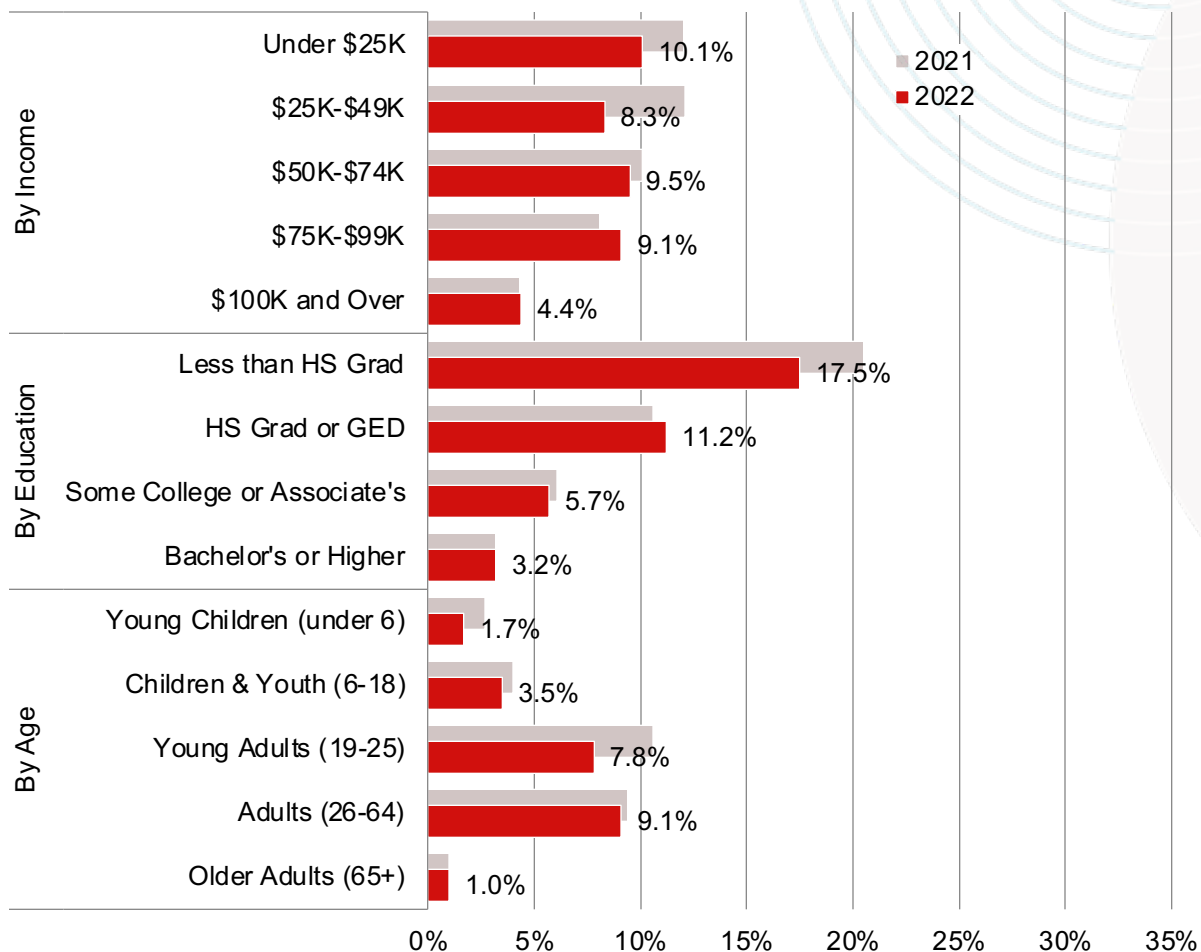
Source: CalOptima Health, Monthly Fast Facts, July 2024

As of July 2024, Orange County Medi-Cal membership from CalOptima Health totaled 923,029, a decline of 44,117 members or 4.6 percent compared to the year before. The 6–18 year-old age group represented the largest decline in members, falling by 29,489 or 2.2 percent over the previous year, followed by the 45–64 age group which declined by 4.6 percent and the 19–44 age group which fell by 1.8 percent. One age group, 65 and above, increased by 3.4 percent.

LOW-INCOME GROUPS SEE UNINSURED RATE FALL

UNINSURED IN ORANGE COUNTY BY INCOME, EDUCATION, AND AGE, 2021 AND 2022

By Income

- Under $25K — 10.1%
- $25K-$49K — 8.3%
- $50K-$74K — 9.5%
- $75K-$99K — 9.1%
- $100K and Over — 4.4%

By Education

- Less than HS Grad — 17.5%
- HS Grad or GED — 11.2%
- Some College or Associate's — 5.7%
- Bachelor's or Higher — 3.2%

By Age

- Young Children (under 6) — 1.7%
- Children & Youth (6-18) — 3.5%
- Young Adults (19-25) — 7.8%
- Adults (26-64) — 9.1%
- Older Adults (65+) — 1.0%

Legend: 2021, 2022

X-axis: 0% 5% 10% 15% 20% 25% 30% 35%

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates; data for 2020 is unavailable due to COVID-19-related impacts.

Uninsured rates increased for multiple Orange County resident cohorts:

- Residents making between $75,000 and $99,999 (from 8.1 percent to 9.1 percent);
- Residents making over $100,000 (from 4.3 percent to 4.4 percent); and
- Residents with at least a high school diploma (from 10.6 percent to 11.2 percent).

Uninsured rates declined for almost every other group, with the largest declines among residents making between $25,000 and $49,999 (from 12.1 percent to 8.3 percent) and those without a high school diploma (from 20.5 percent to 17.5 percent). Rates remained the same for residents with a bachelor's degree or higher (at 3.2 percent) and residents aged 65 and older (at 1.0 percent).

CHRONIC DISEASE

In Orange County, as across the country, sedentary lifestyles, poor nutrition, and tobacco, alcohol, and substance use cause and exacerbate chronic disease. Heart disease, diabetes, and other chronic conditions are some of the most pressing public health issues facing the country, which means that preventing and treating these conditions — and further supporting the county's world-class healthcare system — should be a major short-, medium-, and long-term priority.

Between 2021 and 2022, the prevalence of all chronic diseases increased in Orange County. The death rates of these conditions, however, all decreased except for diabetes. This decrease in death rates speaks to the effectiveness of the county's healthcare system in successfully treating these diseases, but the underlying root causes are causing rising rates of incidence over time.

DIABETES DEATHS INCREASE; HEART DISEASE, STROKE, AND ASTHMA DEATHS DECLINE

DIABETES

DIABETES PREVALENCE AND DEATH RATE IN ORANGE COUNTY, 2014–2022
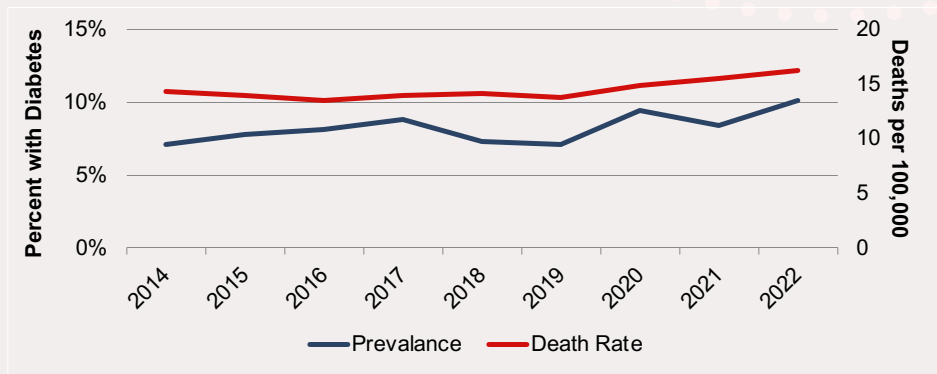
Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles

Reversing last year's decline, the prevalence of diabetes among adult residents in Orange County increased from 8.4 percent in 2021 to 10.1 percent in 2022, an increase of 20.2 percent. The death rate rose from 15.5 per 10,000 residents to 16.2 per 10,000 residents, an increase of 4.5 percent.

HEART DISEASE

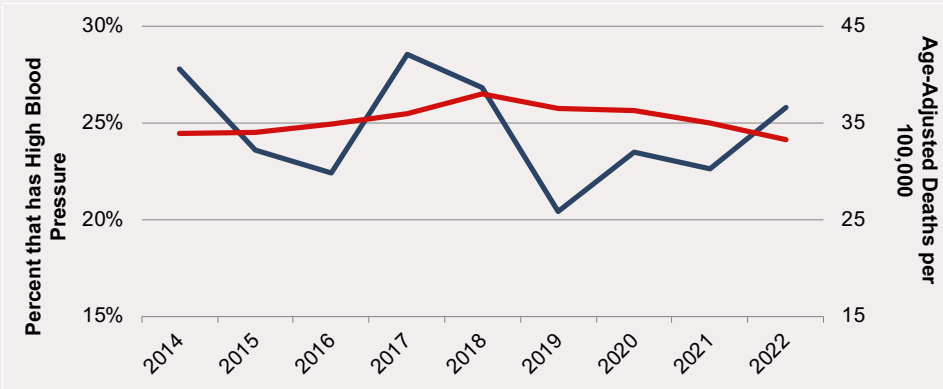**HEART DISEASE PREVALENCE AND DEATH RATE IN ORANGE COUNTY, 2014–2022**
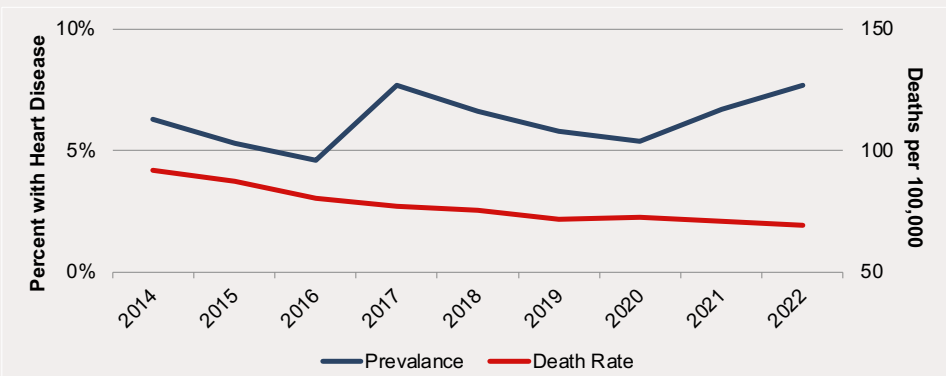
Sources: California Health Interview Survey; California Department of Public Health, County Health Status Profiles

The prevalence of heart disease in Orange County adults increased from 6.7 percent to 7.7 percent from 2021 to 2022, while the death rate of heart disease saw a welcome decline of 2.3 percent from 71.1 to 69.5 per 10,000 residents.

126

HIGH BLOOD PRESSURE/STROKE

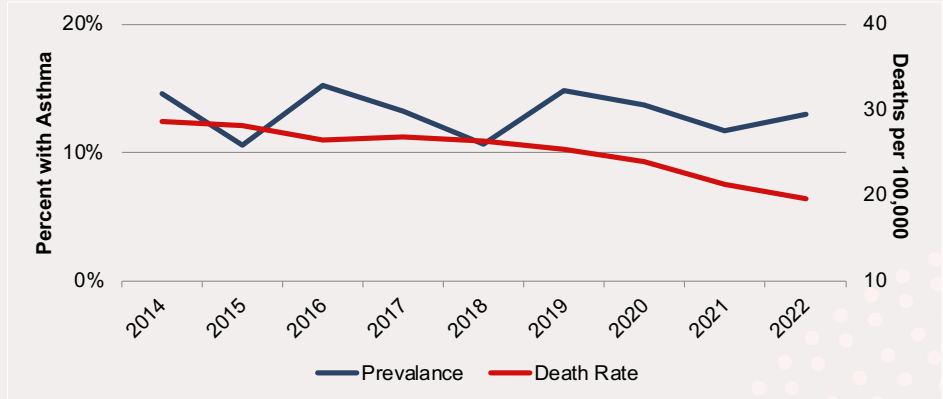## HIGH BLOOD PRESSURE PREVALENCE AND STROKE DEATH RATE IN ORANGE COUNTY, 2014–2022

As with heart disease, the incidence of high blood pressure and strokes increased from 2021 to 2022: from 22.6 percent of residents to 25.8 percent. The death rate declined meaningfully from 35.0 to 33.2 per 10,000 residents.

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

ASTHMA/CHRONIC LOWER RESPIRATORY DISEASE

ASTHMA PREVALENCE AND CHRONIC LOWER RESPIRATORY DISEASE DEATH RATE IN ORANGE COUNTY, 2014–2022

The prevalence of asthma or chronic lower respiratory disease increased from 11.7 percent in 2021 to 13.0 percent in 2022 while the death rate declined from 21.3 to 19.6 per 10,000 residents.

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

DATA NOTES

Asthma prevalence and death data reflect rolling (overlapping) three-year averages. For example, "2020" is an average of 2018, 2019, and 2020 data, and "2019" is an average of 2017, 2018, and 2019 data. The death data shown are age-adjusted rates, which controls for regional variability in age composition. Data points from 2014 to 2020 have been revised and as such should not be compared to data points from previous reports. Due to the disruptions caused by the COVID-19 pandemic, healthcare data may undergo future revisions. Death rates are age-adjusted.
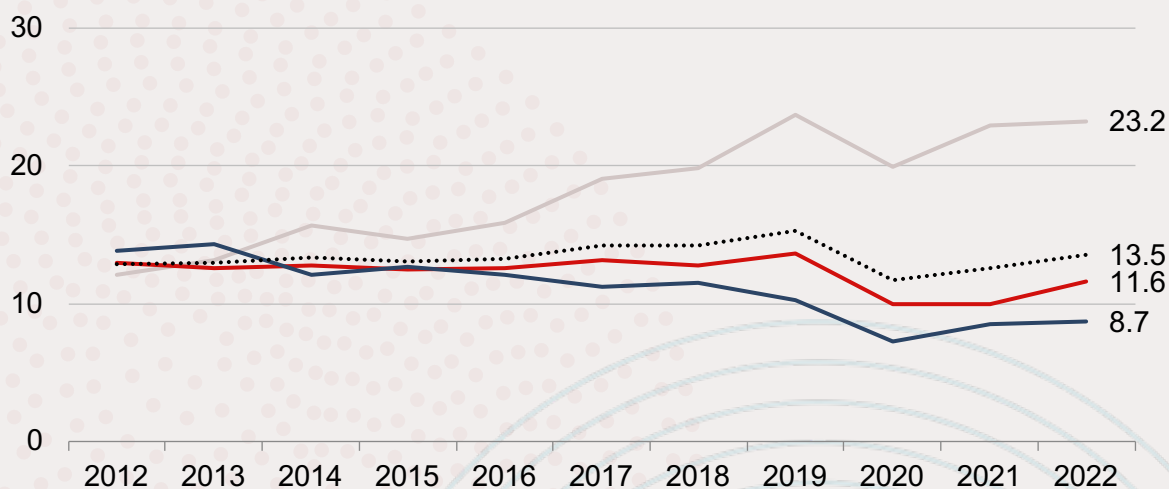
MENTAL HEALTH AND SUBSTANCE USE

HOSPITALIZATIONS FOR MENTAL HEALTH AND MAJOR DEPRESSION INCREASE WHILE SUBSTANCE USE HOSPITALIZATIONS DECLINE

—— Children and Youth   —— Adults   —— Older Adults   ········ All

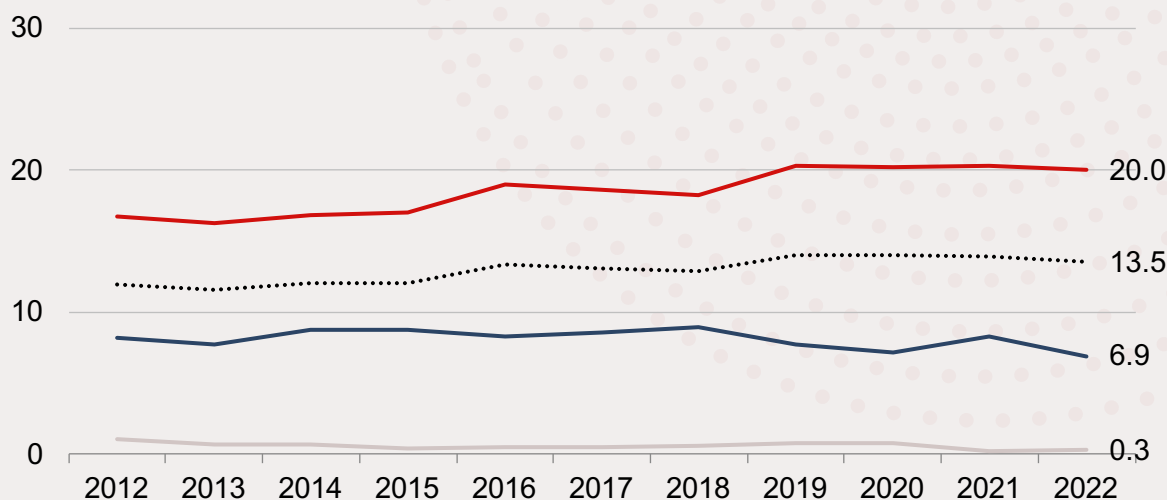### OVERALL MENTAL HEALTH AND SUBSTANCE USE HOSPITALIZATIONS PER 10,000 BY AGE IN ORANGE COUNTY, 2012–2022
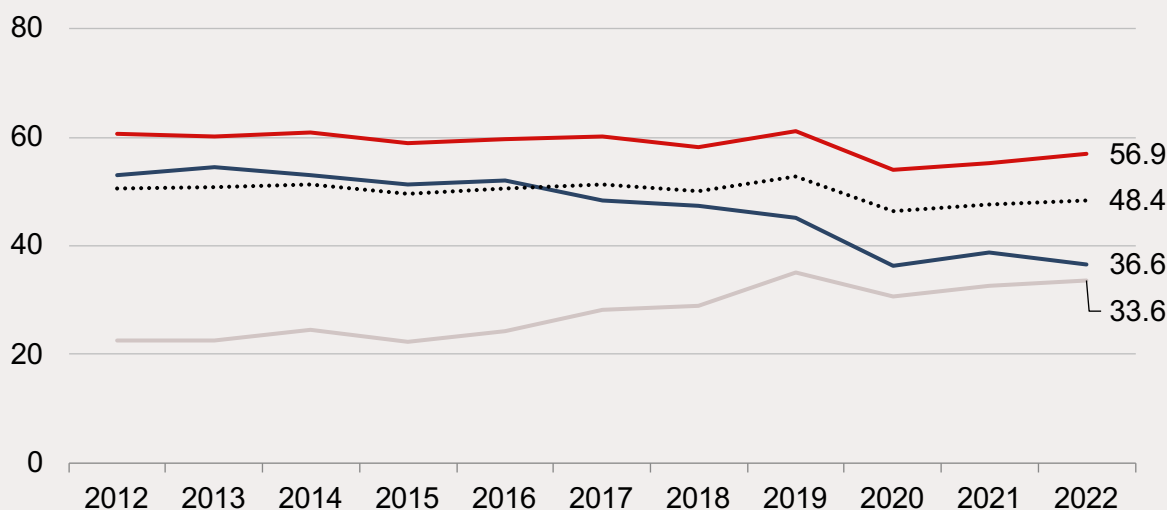
MAJOR DEPRESSION AND MOOD DISORDERS HOSPITALIZATIONS PER 10,000 BY AGE IN ORANGE COUNTY, 2012–2022
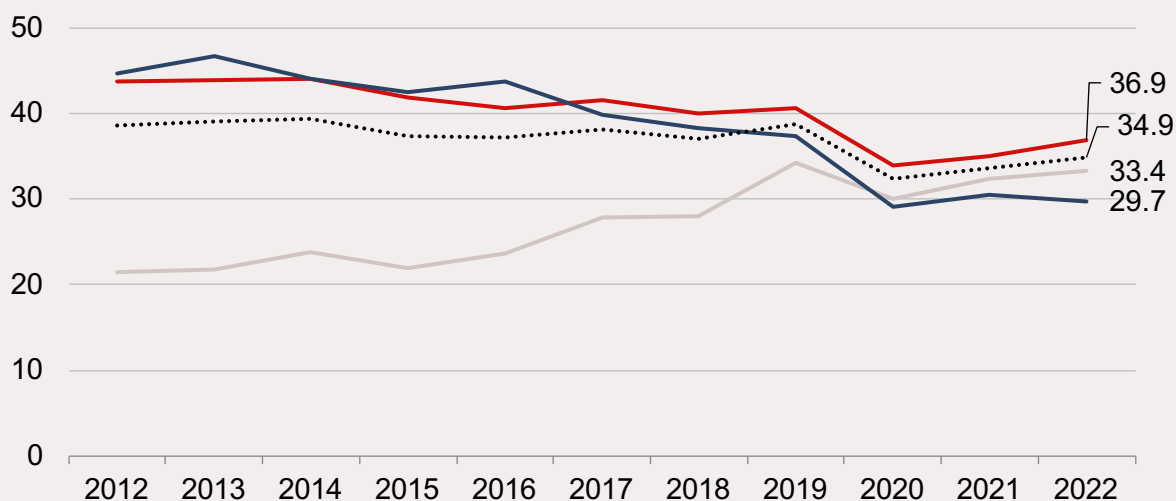
Legend: Children and Youth · Adults · Older Adults · All

SUBSTANCE USE HOSPITALIZATIONS PER 10,000 BY AGE IN ORANGE COUNTY, 2012–2022

Adults	20.0
All	13.5
Older Adults	6.9
Children and Youth	0.3

Years: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022
Y-axis: 0, 10, 20, 30

MENTAL HEALTH-RELATED HOSPITALIZATIONS PER 10,000 BY AGE IN ORANGE COUNTY, 2012–2022

	36.9
	34.9
	33.4
	29.7

Years: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022
Y-axis: 0, 10, 20, 30, 40, 50

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 use-related hospitalization fell from 13.9 per 10,000 residents in 2021 to 13.5 in 2022, a welcome decline of 2.9 percent. Hospitalizations for children and youths under seventeen remained consistent at 0.3 per 100,000 residents while hospitalizations for adults aged 18 to 64 decreased by 1.5 percent and hospitalizations for adults aged 65 and older decreased by 16.9 percent.

Mental health-related hospitalizations, on the other hand, increased from 33.7 per 10,000 residents in 2021 to 34.9 in 2022. While hospitalization rates fell for residents aged 65 and older, they increased for younger residents: by 3.1 percent for children and youths 17 and younger, and by 5.4 percent for adults aged 18 to 64.

Hospitalizations related to major depression or mood disorders increased across all age groups, from 12.6 per 10,000 to 13.5, an alarming 7.1 percent increase. Adults aged 18 to 64 had the highest increase in major depression hospitalizations, registering an increase of 16.0 percent as the hospitalization rate increased from 10 in 2021 to 11.6 in 2022.

Overall, mental health and substance use hospitalizations per 10,000 residents in Orange County increased from 47.6 in 2021 to 48.4 in 2022, a 1.7 percent increase. These rates fell by 5.7 percent for county residents aged 65 and older but increased for both those aged 18 to 64 (by 2.9 percent) and for children and youths aged 17 and under (by 2.8 percent).

PARENT COMPANY OF CHILDREN'S HOSPITAL OF ORANGE COUNTY TO MERGE WITH RADY CHILDREN'S HOSPITAL AND HEALTH CENTER

Two nationally recognized pediatric health systems recently entered into an agreement to merge into a single parent entity to help advance children's health and outcomes across Southern California. Children's Healthcare of California, the parent company of Children's Hospital of Orange County, and the Rady Children's Hospital and Health Center in San Diego, recently announced plans to merge in order to create an advanced pediatric health system for the Southern California region. Building upon years of collaboration, this merger will aim to improve patient care, accelerate research and innovation, retain and attract talent, increase access to care, and promote health equity. While these hospitals will continue to serve their respective communities while maintaining separate staff and boards, they will put together a shared vision while continuing to build on relationships and affiliations with UC Irvine and UC San Diego which are crucial in research, training, and education. The merger is expected to close in late 2024.

Source: Children's Hospital of Orange County; Press Release, December 20, 2023
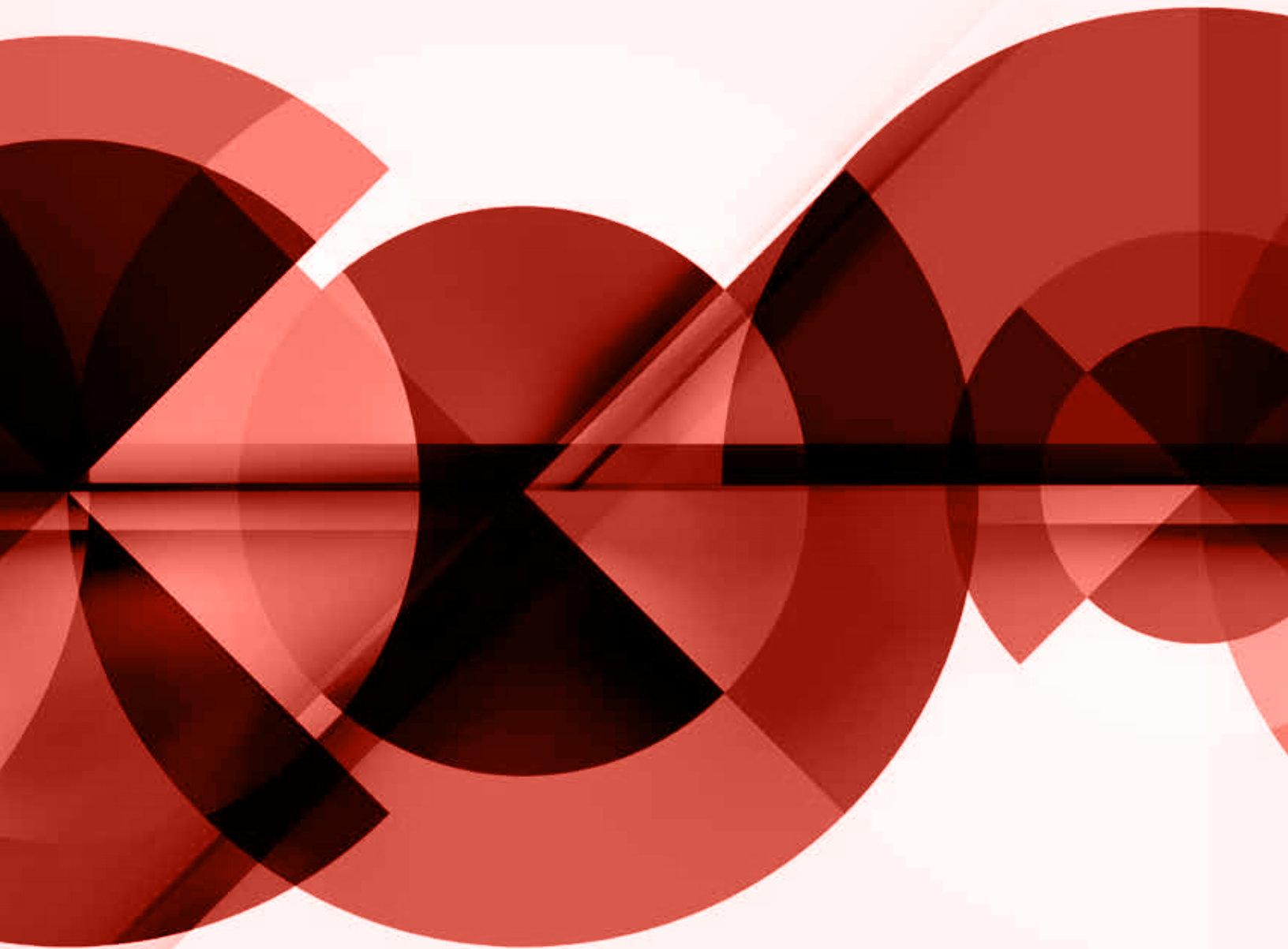
OPIOIDS IN ORANGE COUNTY

- Orange County's opioid-related hospitalization rate declined from 40.1 per 100,000 residents in 2021 to 35.1 in 2022, a decline of 12.5 percent.

- Opioid-related emergency department (ED) visits fell from 92.5 to 87.5, representing a decline of 5.4 percent over the past year.

- Between 2021 and 2022, Orange County's opioid-related death rate fell from 23.2 to 20.2, a decline of 12.9 percent.

- Despite these improvements over the past year, Orange County's opioid-related death rate has increased by 188.6 percent over the past decade, its ED visitation rate by 96.6 percent, and hospitalization rate by 19 percent.

RATE OF OPIOID-RELATED EMERGENCY DEPARTMENT (ED) VISITS, HOSPITALIZATIONS, AND DEATHS IN ORANGE COUNTY PER 100,000 RESIDENTS, 2012–2022
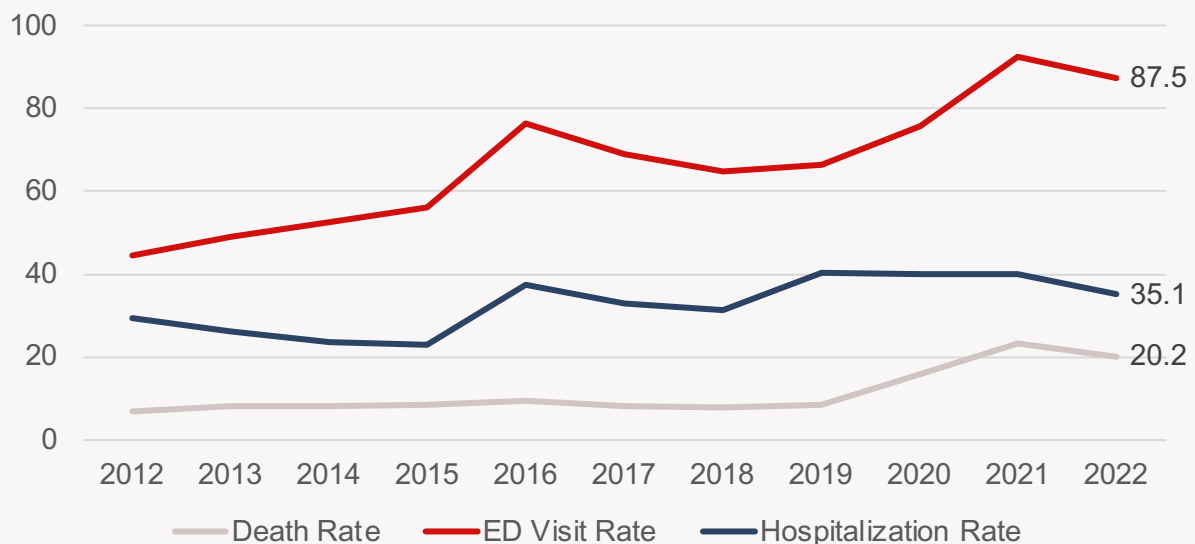
Sources: California's Office of Statewide Health Planning and Development Emergency Department and Patient Discharge Data (ED/hospitalization data); CDC Wonder (death data)
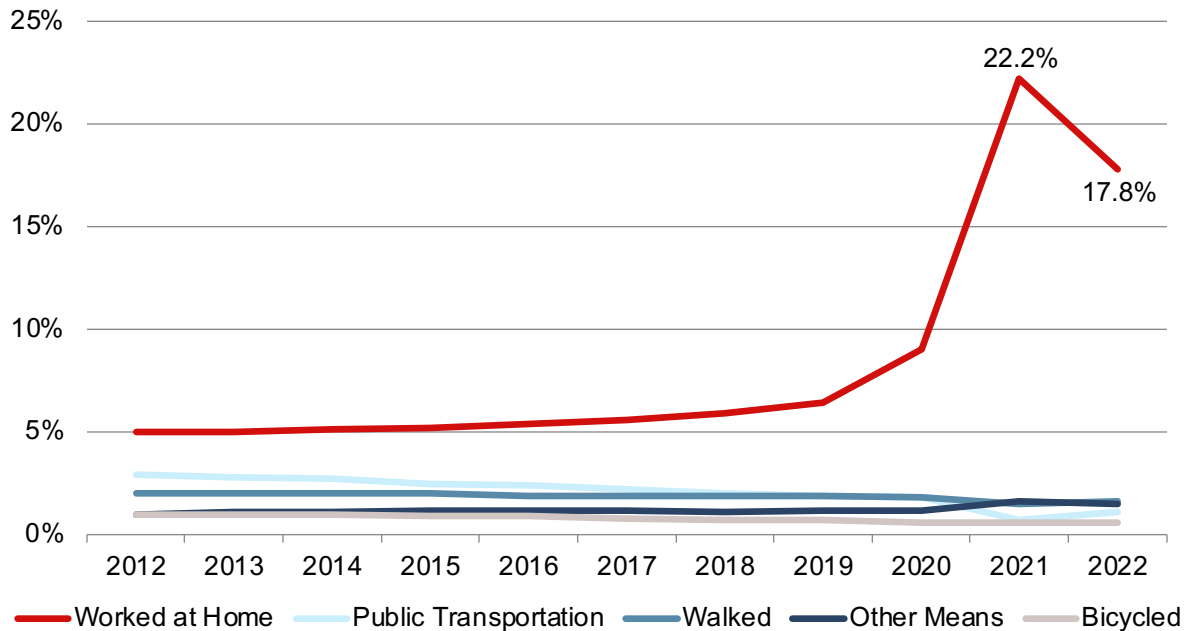
INFRASTRUCTURE

TRANSPORTATION

REMOTE WORK DECLINES IN 2022

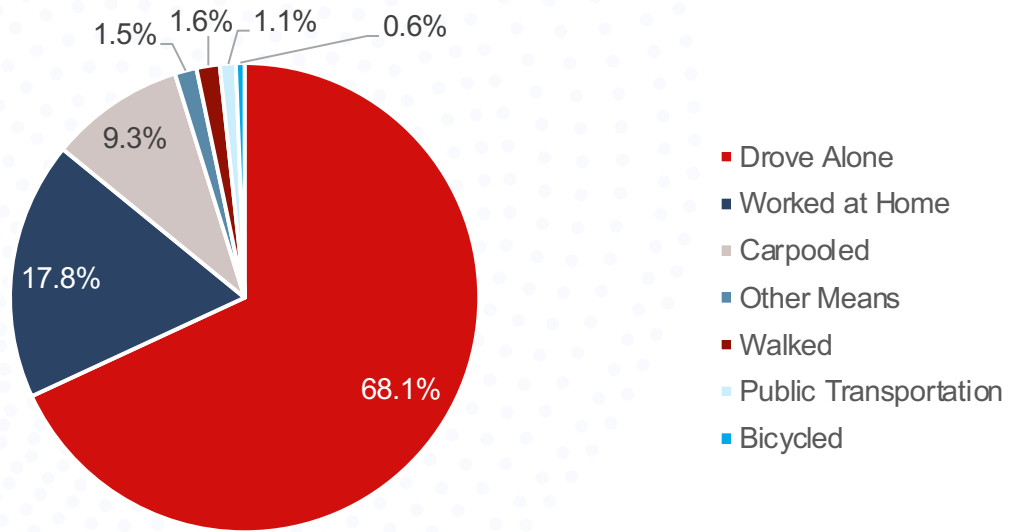### SELECTED MODES OF TRAVEL TO WORK IN ORANGE COUNTY, 2012–2022

After rapidly increasing in the wake of the COVID-19 pandemic, the percentage of Orange County residents working from home declined from 22.2 percent in 2021 to 17.8 percent in 2022. The proportion of county workers driving alone saw a corresponding increase, from 64.9 percent in 2021 to 68.1 percent in 2022; the proportion of workers carpooling also increased from 8.4 percent to 9.3 percent.

While some employers — both in Orange County and across the nation — are pushing for a return to the office, many employees prefer remote or hybrid work, which is likely here to stay at much higher levels than pre-pandemic. Another section of this report discusses the impact of long-term remote work on the county's commercial real estate market.
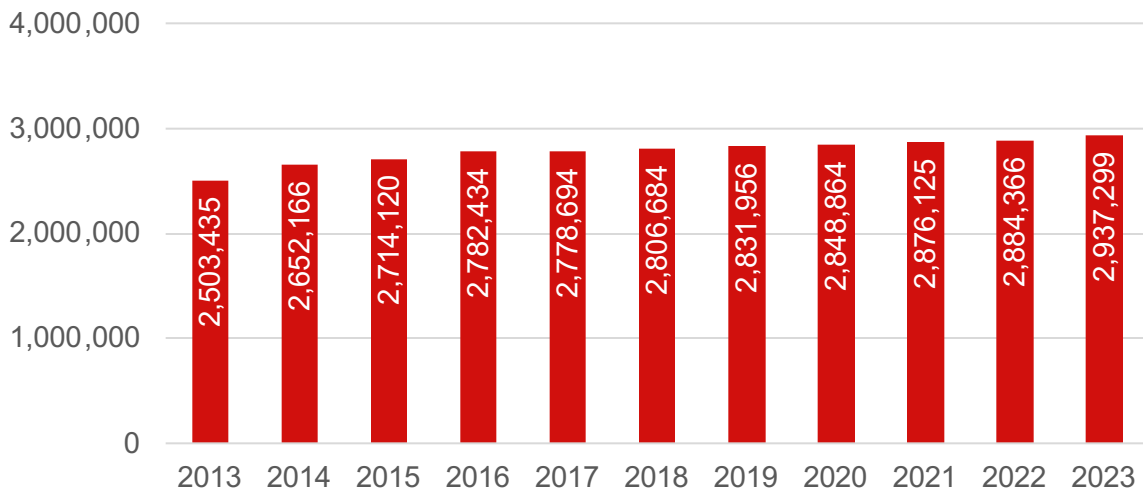
WORKERS USING ROADS & HIGHWAYS INCREASES

MODE OF TRAVEL TO WORK IN ORANGE COUNTY, 2022

Drove Alone — 68.1%
Worked at Home — 17.8%
Carpooled — 9.3%
Other Means — 1.5%
Walked — 1.6%
Public Transportation — 1.1%
Bicycled — 0.6%

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

VEHICLE REGISTRATIONS CLIMB TO JUST UNDER 3 MILLION

VEHICLE REGISTRATIONS IN ORANGE COUNTY, 2013–2023

| Year	Registrations
2013	2,503,435
2014	2,652,166
2015	2,714,120
2016	2,782,434
2017	2,778,694
2018	2,806,684
2019	2,831,956
2020	2,848,864
2021	2,876,125
2022	2,884,366
2023	2,937,299

Source: California Department of Motor Vehicles

Over the past decade, vehicle registrations in Orange County have increased by 433,864 or 17.3 percent. Vehicle registrations increased by 52,933 or 2 percent over the past year.

FREEWAY DELAYS DECLINE IN 2023

ANNUAL HOURS OF FREEWAY DELAY PER CAPITA OR COMMUTER IN ORANGE COUNTY, 2013–2023
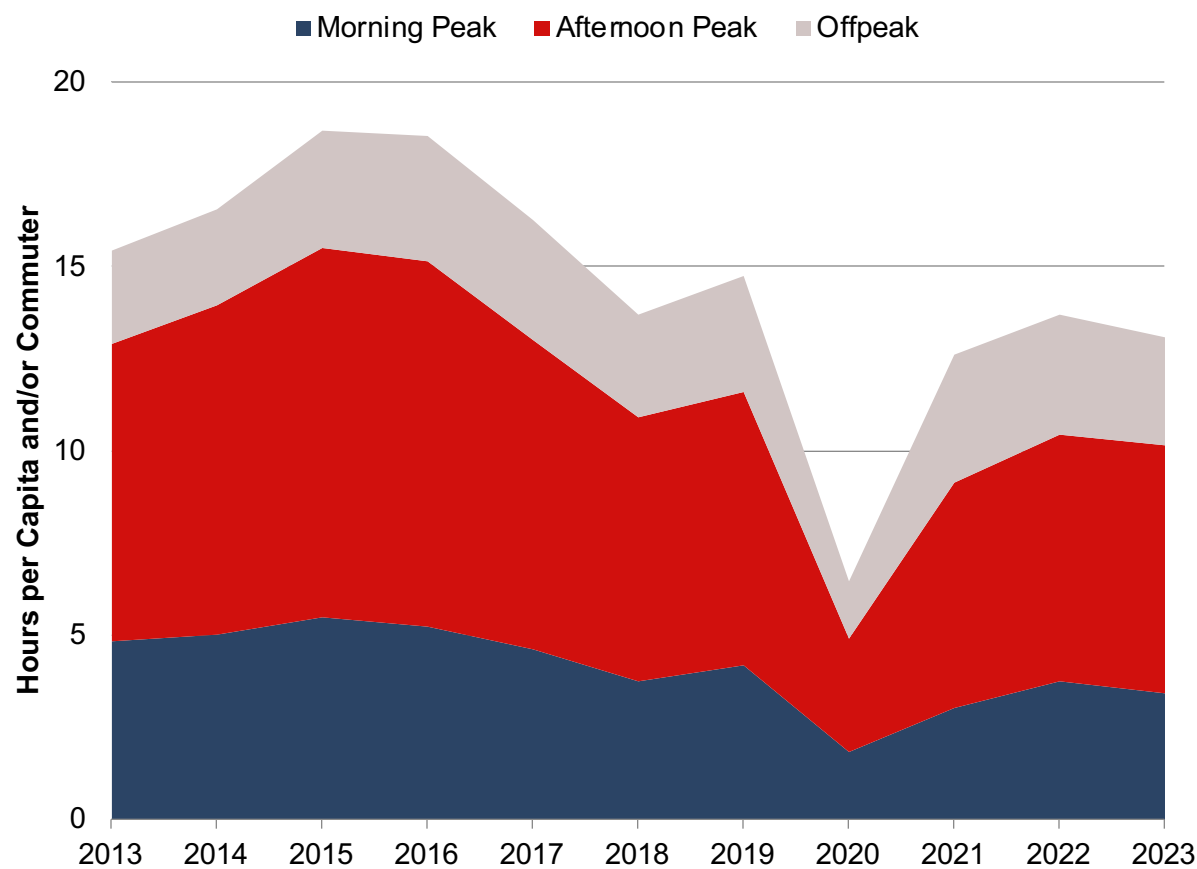
■ Morning Peak   ■ Afternoon Peak   ■ Offpeak

Source: Caltrans, Performance Measurement System; U.S. Census Bureau, American Community Survey, 1-Year Estimates

Despite an increased percentage of county residents commuting to work in 2023, freeway congestion actually declined: from 13.7 hours in 2022 to 13.1 in 2023, likely due to an improved, optimized transportation system that has received significant investment recently.

NOTE

Data for peak hours reflect annual hours of delay per commuter at speeds of 60 miles per hour on freeways in Orange County. Commuter data uses U.S. Census Bureau American Community Survey estimates of residents 16 and over who 'drove alone' and, as such, should not be compared to prior years.

OC HAS LOWEST TRAFFIC CONGESTION IN SOCAL

REGIONAL COMPARISON OF ANNUAL HOURS OF FREEWAY DELAY PER COMMUTER, 2023
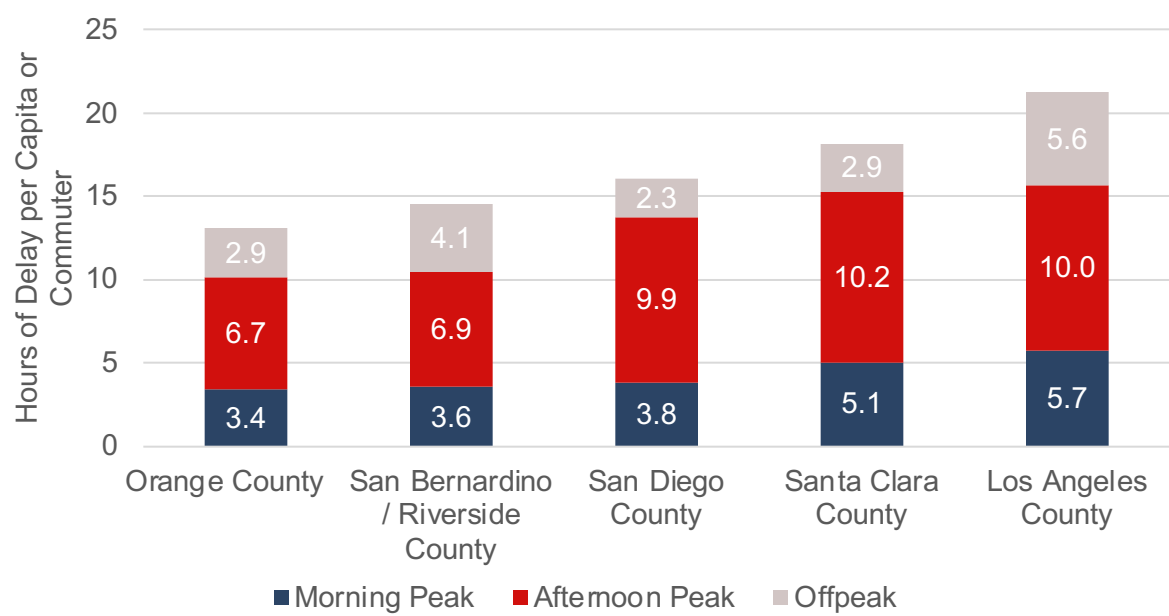
Source: Caltrans, Performance Measurement System; U.S. Census Bureau, American Community Survey, 1-Year Estimates

Average congestion in Orange County was lower than in any of its regional neighbors:

- San Bernardino/Riverside County (14.6 hours)
- San Diego (16.0 hours)
- Los Angeles (21.3 hours)

Congestion decreased in Orange, Los Angeles, Riverside, and San Bernardino counties over the past year while increasing in San Diego and Santa Clara counties.

NOTE

Data for peak hours reflect annual hours of delay per commuter at speeds of 60 miles per hour on freeways in Orange County. Commuter data uses U.S. Census Bureau American Community Survey estimates of residents 16 and over who 'drove alone' and, as such, should not be compared to prior years.

PUBLIC TRANSPORTATION CRUCIAL FOR HISPANIC/LATINO RESIDENTS

PROPORTION OF RESIDENTS BY RACE OR ETHNICITY BY MODE OF TRANSPORTATION TO WORK, 2022
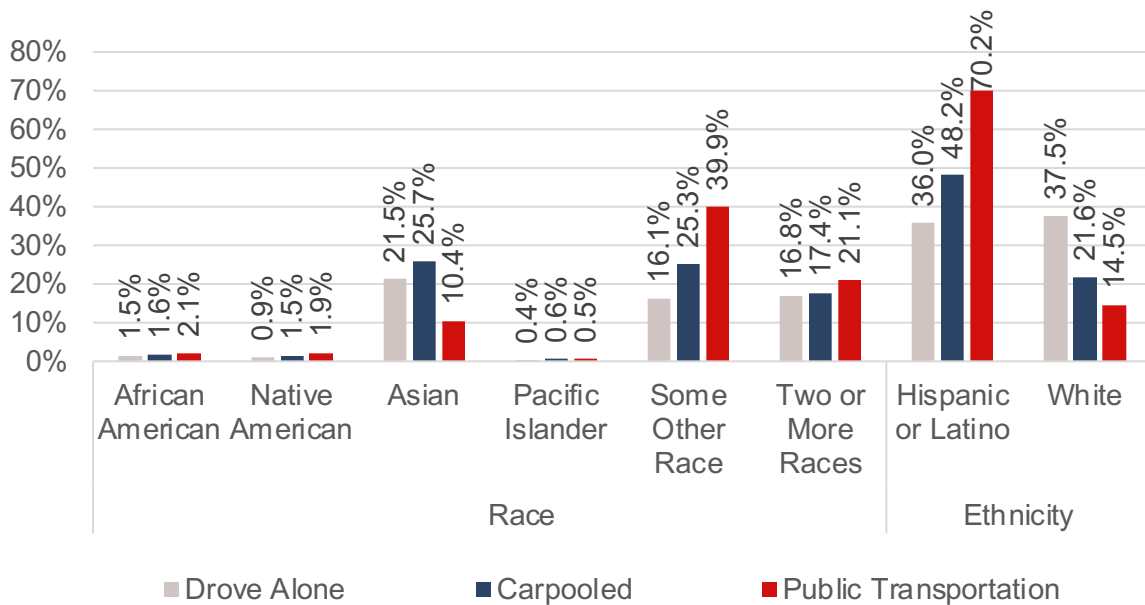

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates; Totals may not sum to 100 due to how the U.S. Census Bureau breaks down racial and ethnic groups.

Within Orange County, racial and ethnic groups have very different commuting patterns. For instance, approximately 70.2 percent of Hispanic or Latino residents used public transportation in 2022, compared to only 14.5 percent of White residents and only 10.4 percent of Asian residents. Looking at specific races, 39.9 percent of residents who identify as 'some other race' used public transportation followed by 21.1 percent of residents who identified as 'two or more races.' As remote work trends have declined slightly from their pandemic-related highs, public transportation becomes even more important, especially in more diverse communities or in disinvested communities.

OC HAS A NET INFLOW OF MORE THAN 160,000 WORKERS

INTERCOUNTY COMMUTING PATTERNS BETWEEN ORANGE AND NEIGHBORING COUNTIES, 2021
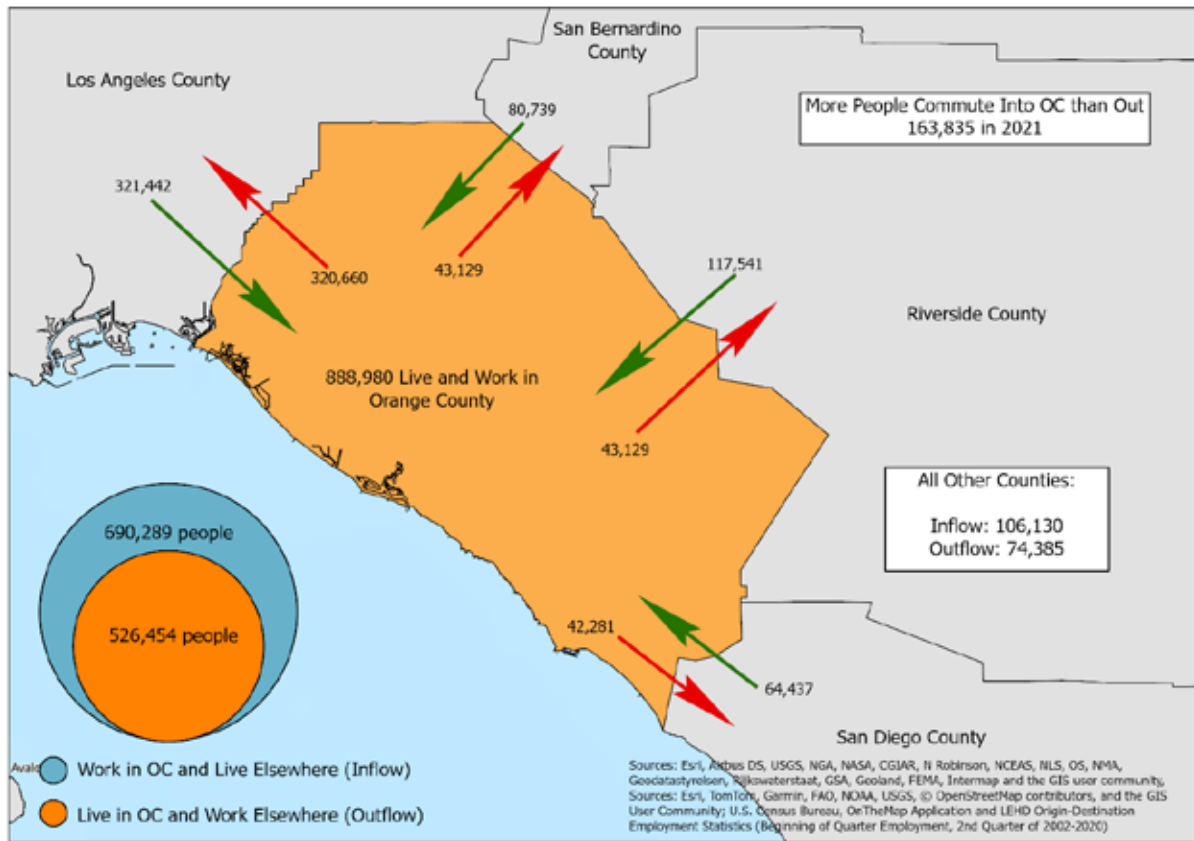
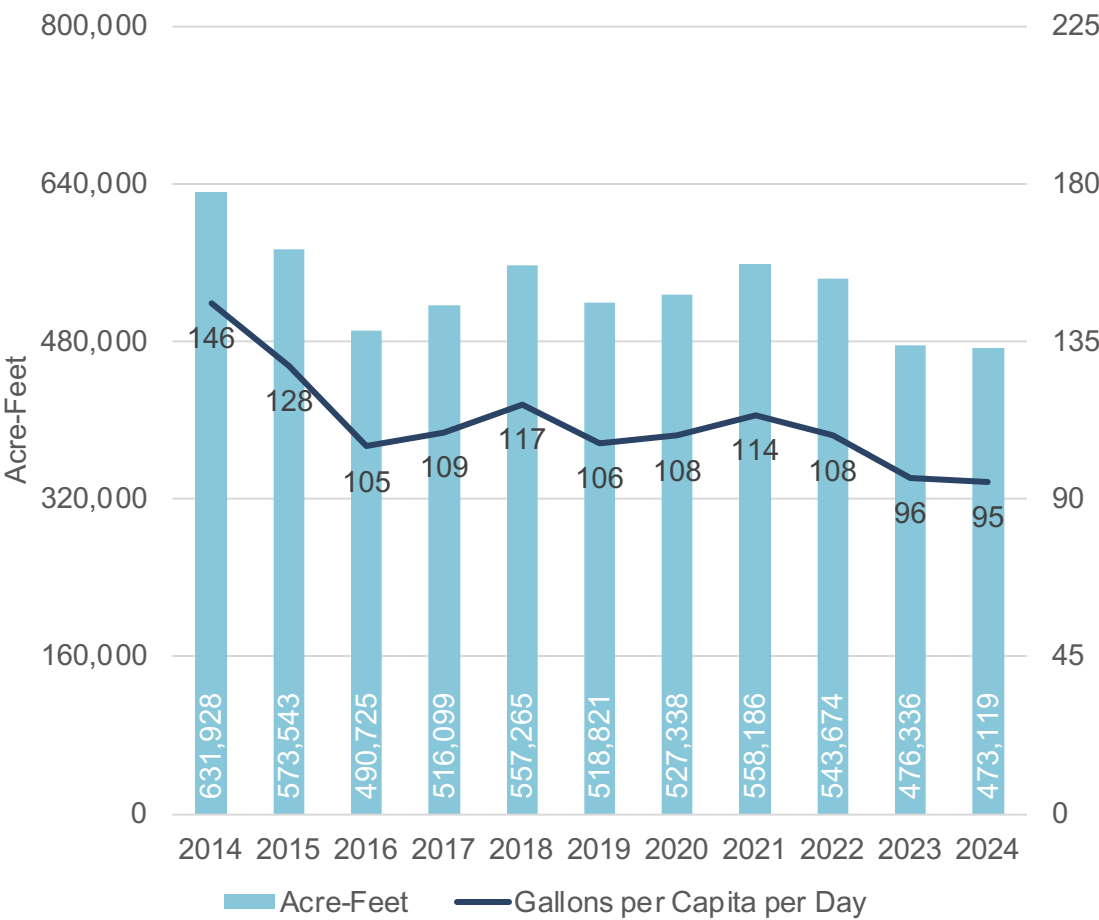*Source: U.S. Census, OnTheMap, Includes all public and private-sector jobs*

In 2021, 888,980 county residents both lived and worked in Orange County, while 690,289 workers commuted into the county from other areas and 526,454 county residents commuted to other counties for work. Orange County therefore had a net surplus of 163,835 commuters, an illustration of both its role as an economic engine and employment center for Southern California and its expensive housing market.

Los Angeles had the largest flow of commuters in and out of Orange County: 321,442 from Los Angeles to Orange County and 320,660 going the opposite direction. 117,541 Riverside County residents commuted to Orange County, with only 43,129 Orange County workers commuting to Riverside County; this was the largest gap among any of Orange County's neighbors.

WATER USE AND SUPPLY

WATER USAGE DECLINES SLIGHTLY

URBAN WATER USAGE IN ACRE-FEET AND GALLONS PER CAPITA PER DAY IN ORANGE COUNTY, 2014–2024

Year	Acre-Feet	GPCD
2014	631,928	146
2015	573,543	128
2016	490,725	105
2017	516,099	109
2018	557,265	117
2019	518,821	106
2020	527,338	108
2021	558,186	114
2022	543,674	108
2023	476,336	96
2024	473,119	95

■ Acre-Feet   — Gallons per Capita per Day

Source: Municipal Water District of Orange County; data for 2023 has been revised

Orange County's water usage has trended downward since 2021. Gallons per capita per day (GPCD) fell from 96 in 2023 to 95 in 2024 as did total consumption, which fell from 476,336 acre-feet to 473,119 acre-feet. Over the past decade, total GPCD has declined by 34.9 percent, an illustration of how effective the county's water-saving strategies have been. Overall, consumption remains well below both pre-2015 levels and the Water Conservation Act of 2009 (SB X7-7) target of 158 GPCD.

CONSERVATION EFFORTS IMPROVE BY 8.4 PERCENT

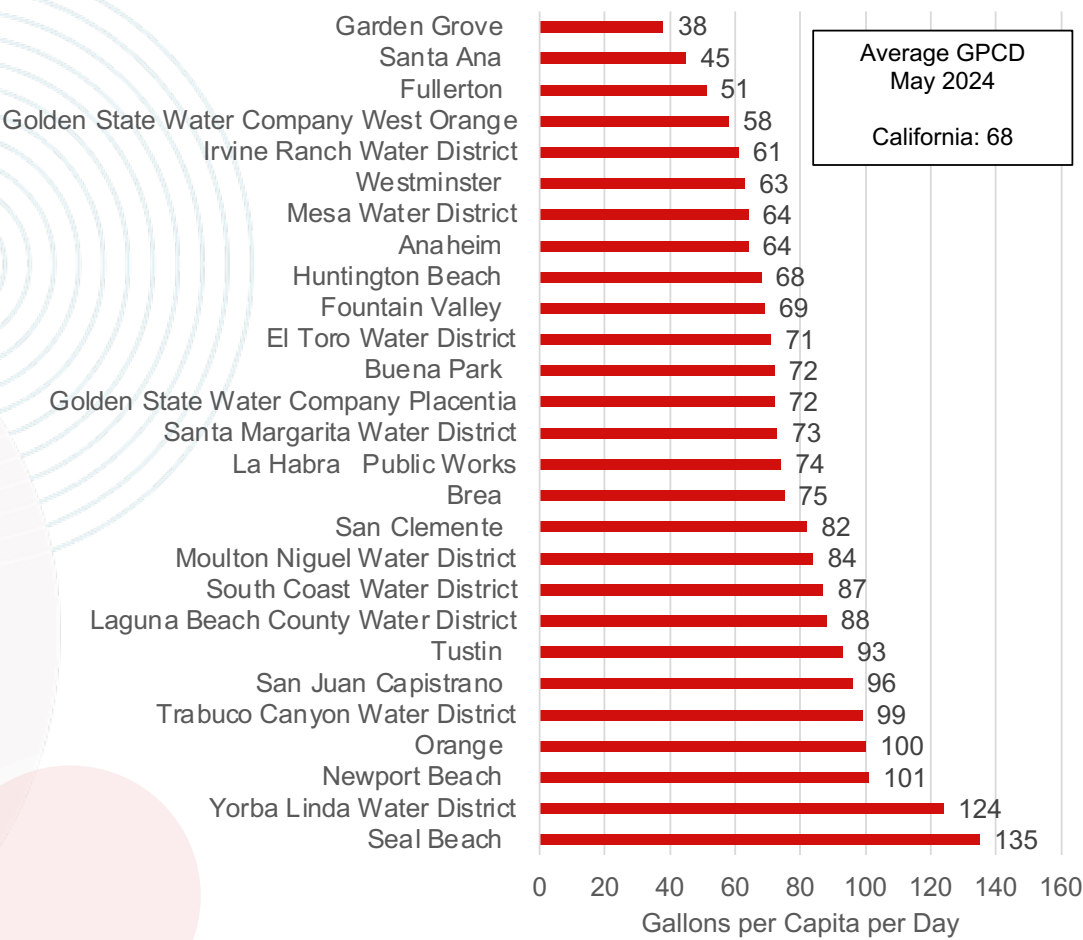## ORANGE COUNTY WATER SOURCES PROJECTIONS, 2024–2040
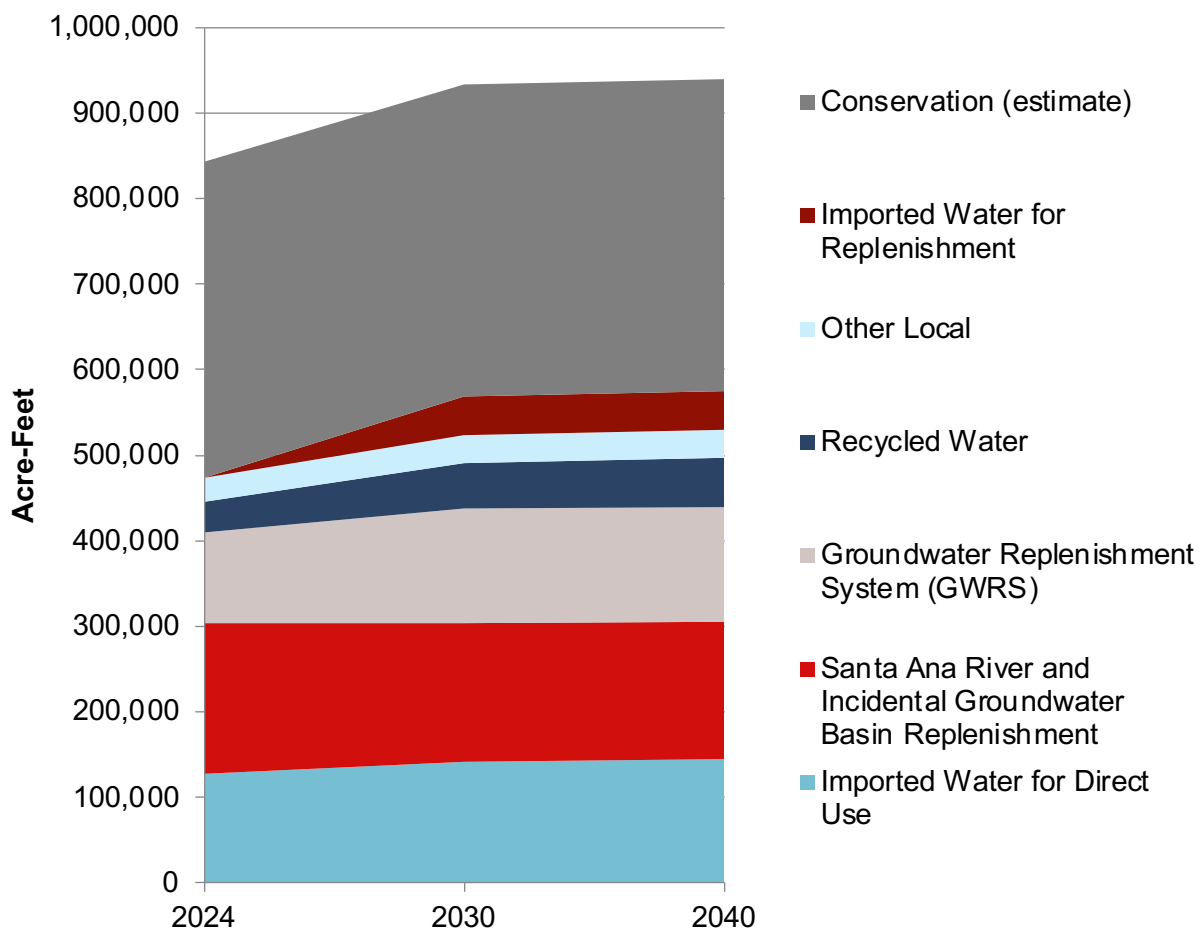
Sources: Municipal Water District of Orange County; Orange County Water District

Water conservation efforts in Orange County saved 370,584 acre-feet of water, representing a significant year-over-year increase; water conservation efforts had previously increased from 306,806 in 2022 to 341,908 in 2023. These figures are expected to fall slightly over the next decade and a half: to 365,277 acre-feet by 2030 and 364,360 acre-feet by 2040.

MOST OC WATER RETAILERS SEE HIGHER WATER USAGE THAN STATEWIDE AVERAGE IN MAY

WATER USAGE IN GALLONS PER CAPITA PER DAY (GPCD) BY ORANGE COUNTY WATER RETAILER, MAY 2024

Average GPCD
May 2024

California: 68

Water Retailer	GPCD
Garden Grove	38
Santa Ana	45
Fullerton	51
Golden State Water Company West Orange	58
Irvine Ranch Water District	61
Westminster	63
Mesa Water District	64
Anaheim	64
Huntington Beach	68
Fountain Valley	69
El Toro Water District	71
Buena Park	72
Golden State Water Company Placentia	72
Santa Margarita Water District	73
La Habra Public Works	74
Brea	75
San Clemente	82
Moulton Niguel Water District	84
South Coast Water District	87
Laguna Beach County Water District	88
Tustin	93
San Juan Capistrano	96
Trabuco Canyon Water District	99
Orange	100
Newport Beach	101
Yorba Linda Water District	124
Seal Beach	135

Gallons per Capita per Day

Source: State Water Resources Control Board

During May 2024, eight of Orange County's 27 water districts had lower usage than the state's 68 GPCD target. Within Orange County, Garden Grove, Santa Ana, and Fullerton had the lowest consumption rates at 38, 45, and 51 GPCD, respectively, while Seal Beach (135 GPCD), Yorba Linda Water District (124 GPCD), and Newport Beach (101 GPCD) had the highest consumption.
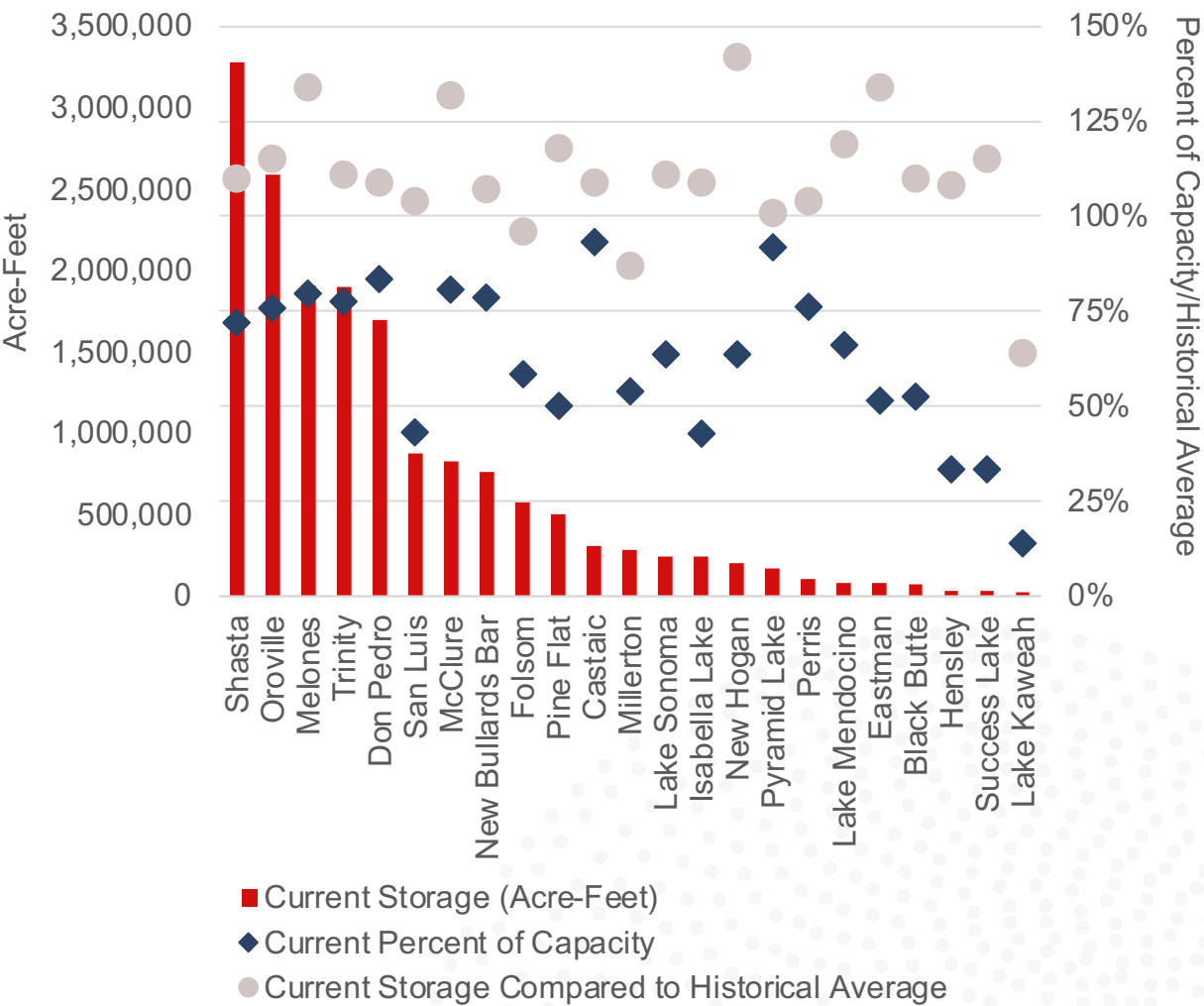

DATA NOTES

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. 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. Water conservation savings are calculated based on annual difference between the 240 average GPCD between the year 1980 to 1989 vs the present year [ex.(240 GPCD X – FY 2021 GPCD) X 365 Days X 325851 Gallons = Annual Savings in Acre Feet)].

DROUGHT STATUS

HEAVY RAINS FILL CALIFORNIA RESERVOIRS

As of April 1, 2024, based on 130 ground stations throughout the state, California snowpack was measured to be 110 percent of its historical average, a large improvement over the 28 percent measured earlier in the year.[15] Heavy storms in March served to improve snowpack, and as of August 8, 2024, 77.3 percent of the state was under no drought intensity.[16] Despite rainfall and runoff, water storage at major state reservoirs has declined compared to last year. Shasta, the largest reservoir in the state, currently stands at 72 percent full with approximately 3.3 million acre feet, followed by Oroville with 2.6 million acre feet or 75.6 percent of capacity, and Melones with 1.9 million acre feet or 79.6 percent of capacity. Nearly all reservoirs' current storage capacity was above historical averages of storage with the exception of Folsom (96 percent of historical average), Millerton (87 percent of historical average), and Lake Kaweah (64 percent of historical average).

CURRENT TOTAL STORAGE AND CAPACITY FOR MAJOR RESERVOIRS IN CALIFORNIA, AUGUST 11, 2024


■ Current Storage (Acre-Feet)
◆ Current Percent of Capacity
● Current Storage Compared to Historical Average

Source: California Department of Water Resources, Current Conditions for Major Reservoirs

[15] https://water.ca.gov/News/News-Releases/2024/Apr-24/April-Snow-Survey-Shows-Above-Average-Snowpack-for-Second-Straight-Season

[16] https://droughtmonitor.unl.edu/CurrentMap/StateDroughtMonitor.aspx?CA

PERCENT OF HISTORIC AVERAGE PRECIPITATION BY HYDROLOGICAL REGION IN CALIFORNIA, OCTOBER 2023 – JULY 2024 WATER YEAR
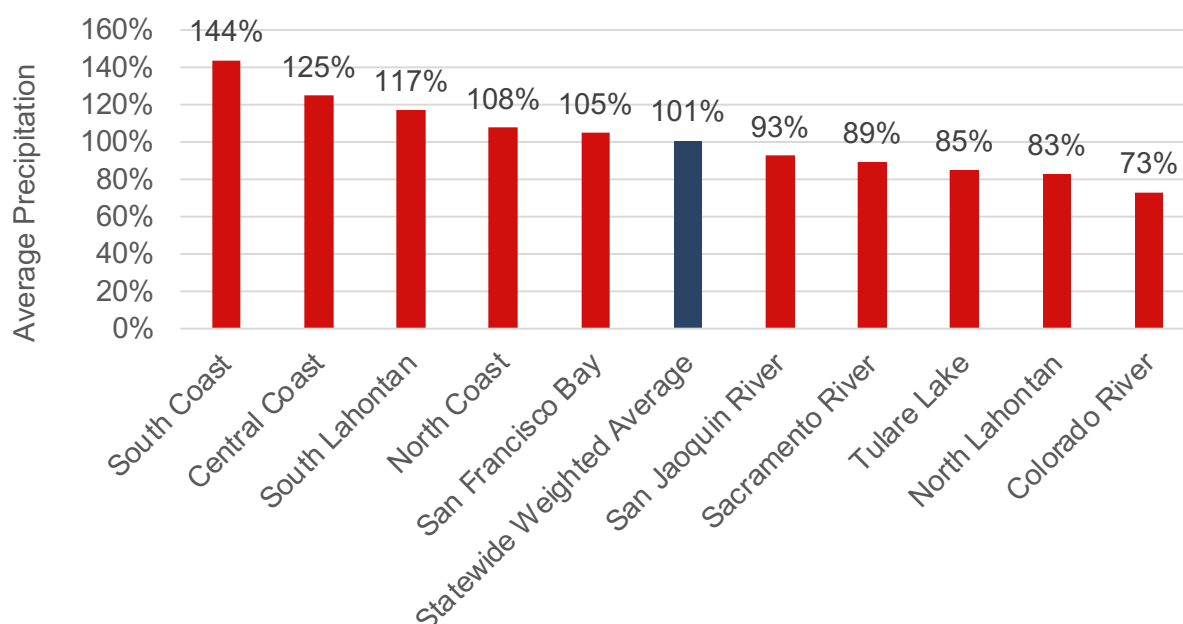
Source: California Department of Water Resources, Statewide Precipitation Data

While the statewide weighted average for precipitation remained above average for the 2023/2024 water year, at 101 percent, it also represents a significant decline compared to the 141 percent measured in last year's report. South Coast (144 percent), Central Coast (125 percent), and South Lahontan (117 percent) hydrologic regions saw the highest rates of precipitation compared to historical averages.

While this year's snowpack and precipitation failed to keep pace with the record-breaking year experienced in 2022/2023, they continue to keep potential droughts at bay across most of the state. Continuing to properly manage snowpack and water storage will remain an important priority for stakeholders across the state. Orange County already has a strong history of smart water management highlighted by the Groundwater Replenishment System (GWRS). A joint program between Orange County Water District (OCWD) and Orange County Sanitation District (OC San), the GWRS remains the world's largest advanced water purification system for potable reuse capable of providing 130 million gallons of water per day serving 1 million residents. Thanks to the completion of the GWRS final expansion, purified recycled water totaled 112,038 acre-feet in 2023, greater than any previous years.[17]

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[17] https://www.ocwd.com/wp-content/uploads/2023-GWRS-Annual-Report-revised.pdf

BROADBAND INTERNET ACCESS

## OC TIED WITH SANTA CLARA IN HOUSEHOLDS WITH AN INTERNET CONNECTION

TYPES OF COMPUTERS IN HOUSEHOLDS BY COUNTY, 2022
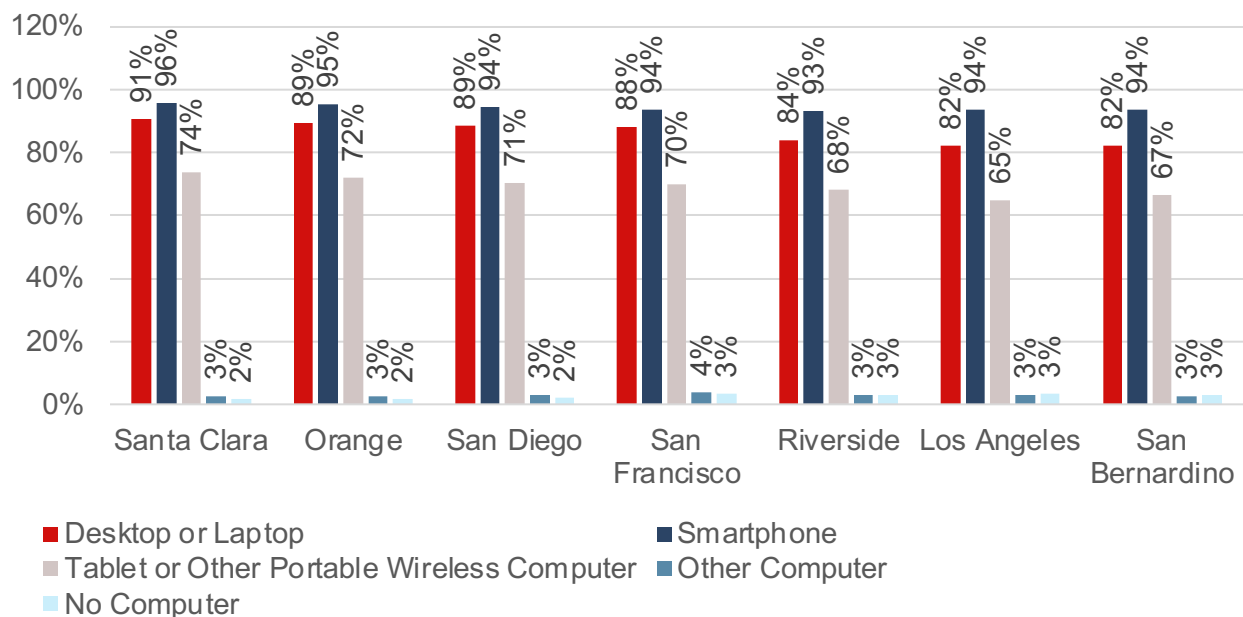
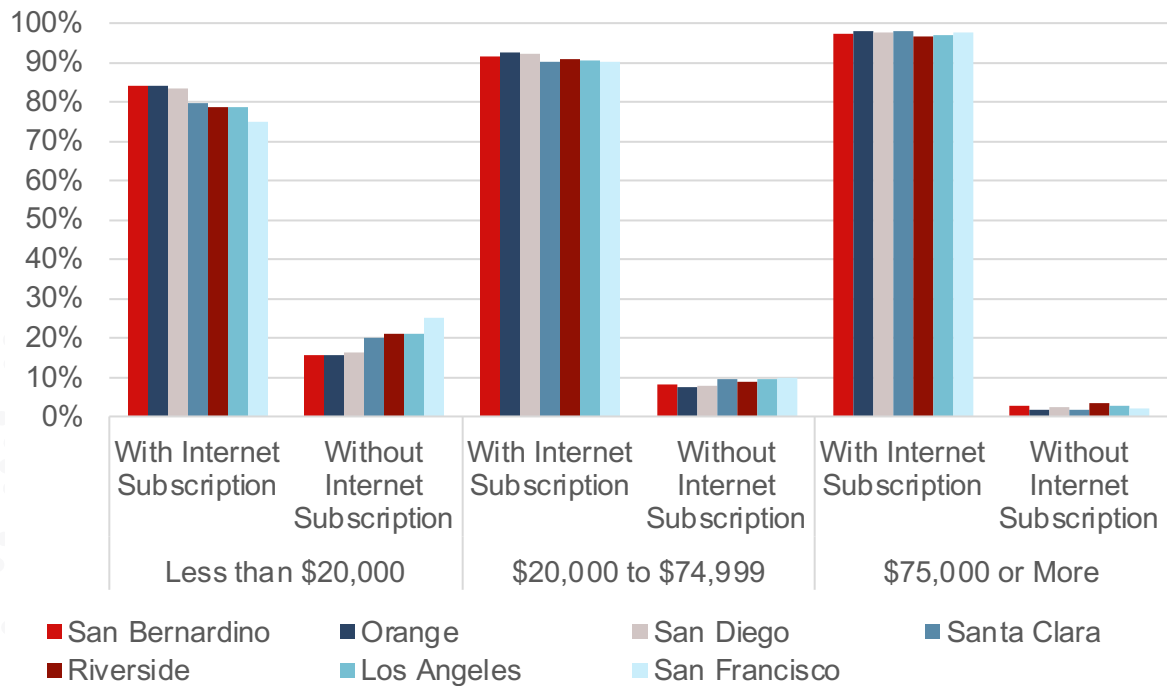*Source U.S. Census Bureau, American Community Survey, 1-Year Estimates*

Despite a year-over-year decline in remote workers/work from home, broadband internet remains a core infrastructure and economic development asset for Orange County residents, workers, businesses, and municipalities. Smartphones remain the primary method of internet access; 95 percent of Orange County households have smartphones, while 89 percent have a desktop or laptop and 72 percent have a tablet. Overall, 98.1 percent of Orange County households have one or more computing devices while 95.5 percent of households have a broadband internet connection. As new technologies continue to emerge, workplace trends evolve, and consumer preferences shift, uninterrupted access will remain an essential utility, a way to access information, entertainment, education, and job opportunities.

PERCENTAGE OF HOUSEHOLDS WITH AND WITHOUT INTERNET SUBSCRIPTIONS BY COUNTY, 2022
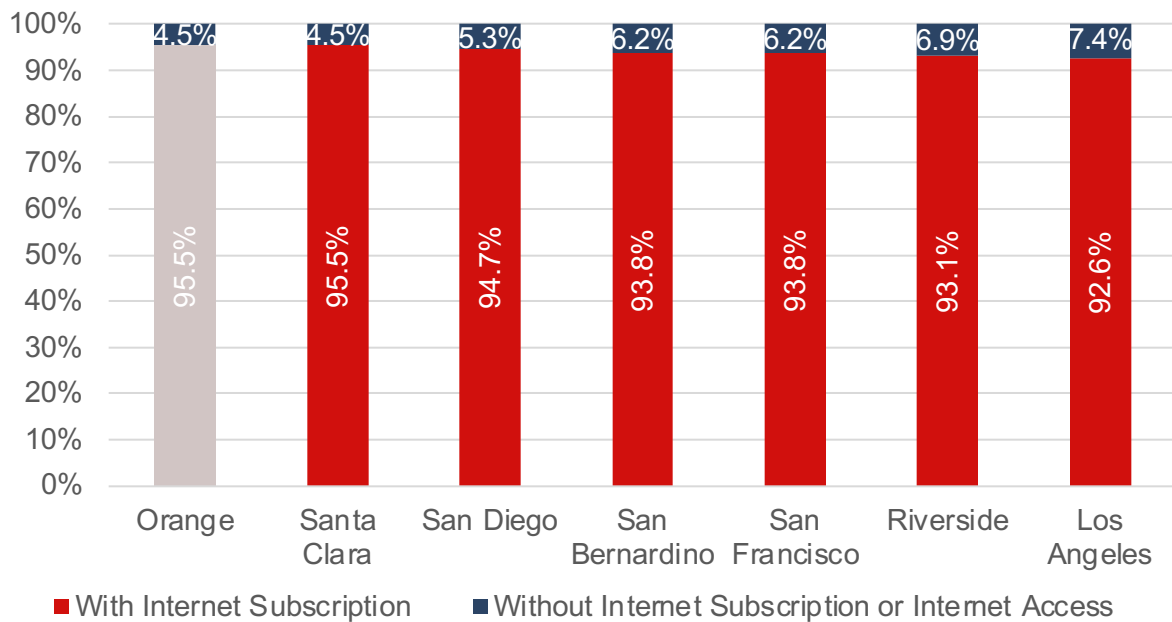
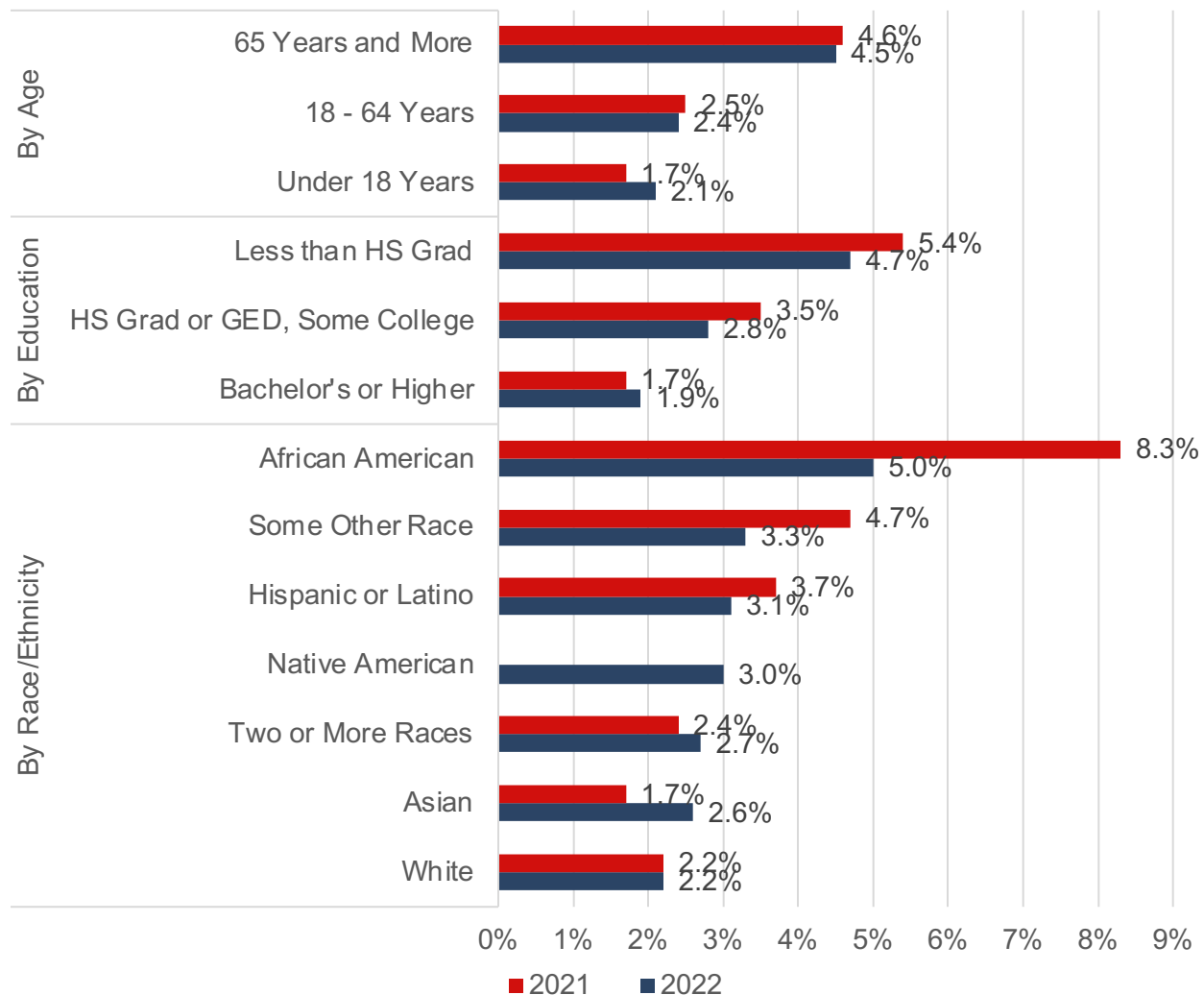*Source U.S. Census Bureau, American Community Survey, 1-Year Estimates*

INTERNET SUBSCRIPTION ACCESS BY INCOME LEVEL BY COUNTY, 2022

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

Internet access varied significantly within Orange County. For instance, only 84.1 percent of households making less than $20,000 had an internet subscription compared to 98.1 percent of households making $75,000 or more. At 92.5 percent, Orange County has the highest access rate amongst peers in the $20,000–$74,999 household group. Income disparities in internet access hold true across all peer regions, highlighting the need to improve broadband internet access for lower-income households across the state. As all of our lives become increasingly digital, ensuring residents can effectively access online services and programs, especially online education and workforce training resources, remains a priority.

PERCENTAGE OF HOUSEHOLDS WITHOUT INTERNET SUBSCRIPTION BY AGE, EDUCATION, AND ETHNICITY, 2021 AND 2022
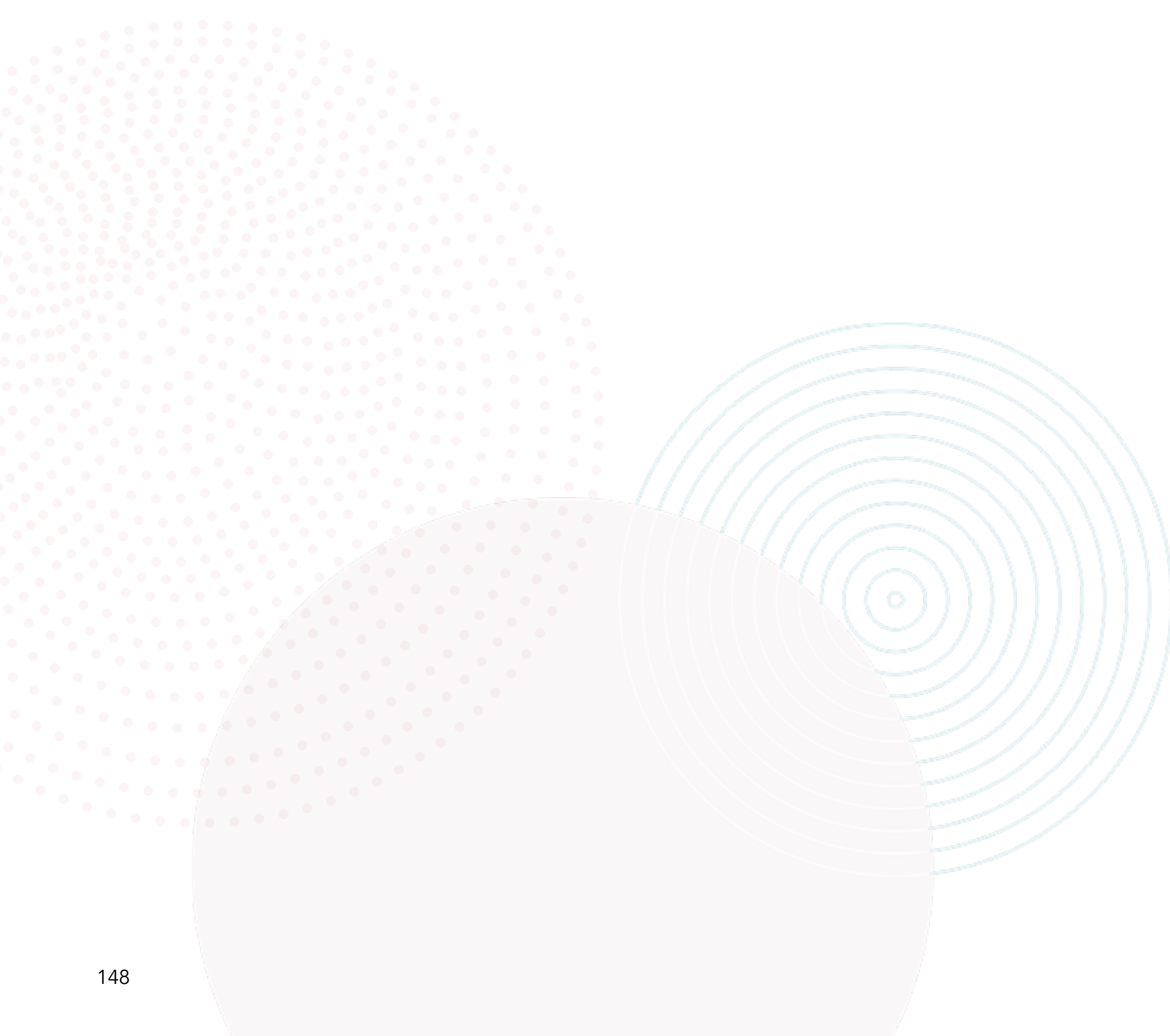

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates; data not available for Pacific Islander for 2021 or 2022 while Native American populations in Orange County only had data for 2022.

Internet access has improved for Orange County's working age (18 to 64 years) and senior (65 years and over) populations from 2021 to 2022, rising from 97.5 percent to 97.6 percent and from 95.4 percent to 95.5 percent, respectively. The internet access of residents under 18 decreased, from 98.3 percent to 97.9 percent.

As seen above, the percentage of households with a bachelor's degree who lacked internet access rose from 1.7 percent to 1.9 percent; these rates also declined for residents with only a high school diploma (from 3.5 percent to 2.8 percent) and those without a high school diploma (from 5.4 percent to 4.7 percent).

African American households in Orange County saw the largest improvement in internet access; only 5.0 percent lacked internet access in 2022 compared to 8.3 percent in 2021. Residents identifying as 'some other race' also saw increased access, as seen above, as did Hispanic or Latino residents. The percentage of Asian households lacking an internet subscription, on the other hand, increased from 1.7 percent to 2.6 percent and the percentage of residents who identify as 'two or more races' increased from 2.4 percent to 2.7 percent. The proportion of White residents without an internet subscription remained constant at 2.2 percent.

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