

AMERICAN COMMUNITY SURVEY 2022 1-YEAR ESTIMATES

SHIFTS & CONSTANTS IN POST-COVID
SOUTHERN CALIFORNIA

SEPTEMBER 20, 2023

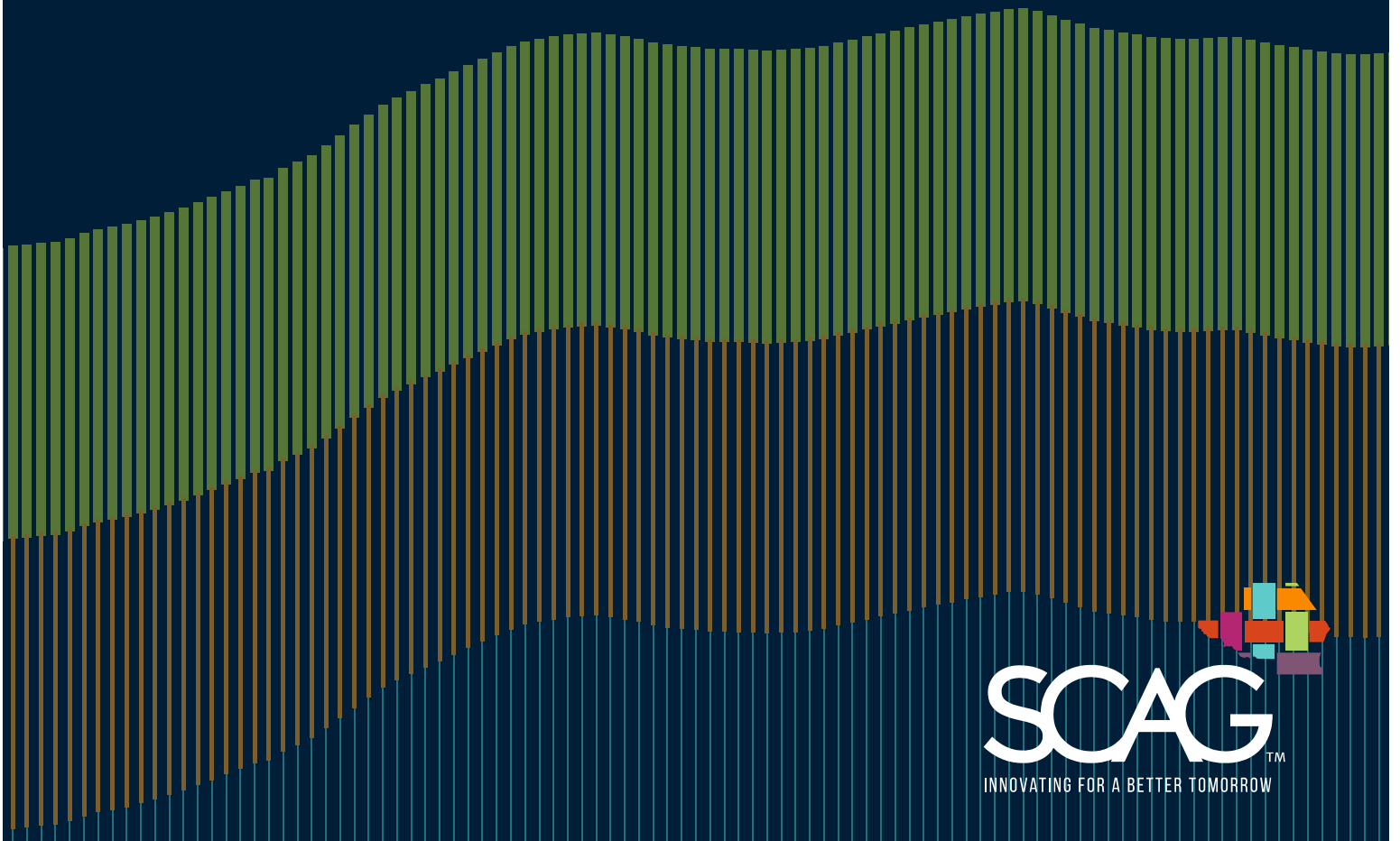


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American Community Survey 2022 1-Year Estimates: Shifts and Constants in Post-COVID Southern California

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The extent of the changes brought on by the COVID-19 pandemic are still becoming clear. This report examines new data from the American Community Survey (ACS) to provide insights into how demographic, economic and housing trends in Southern California have changed between 2019 and 2022 – and what has stayed the same.

This report compares several topics in demographic, economic, and housing conditions across the United States, California, the SCAG region, and each of its six counties. The topics include:

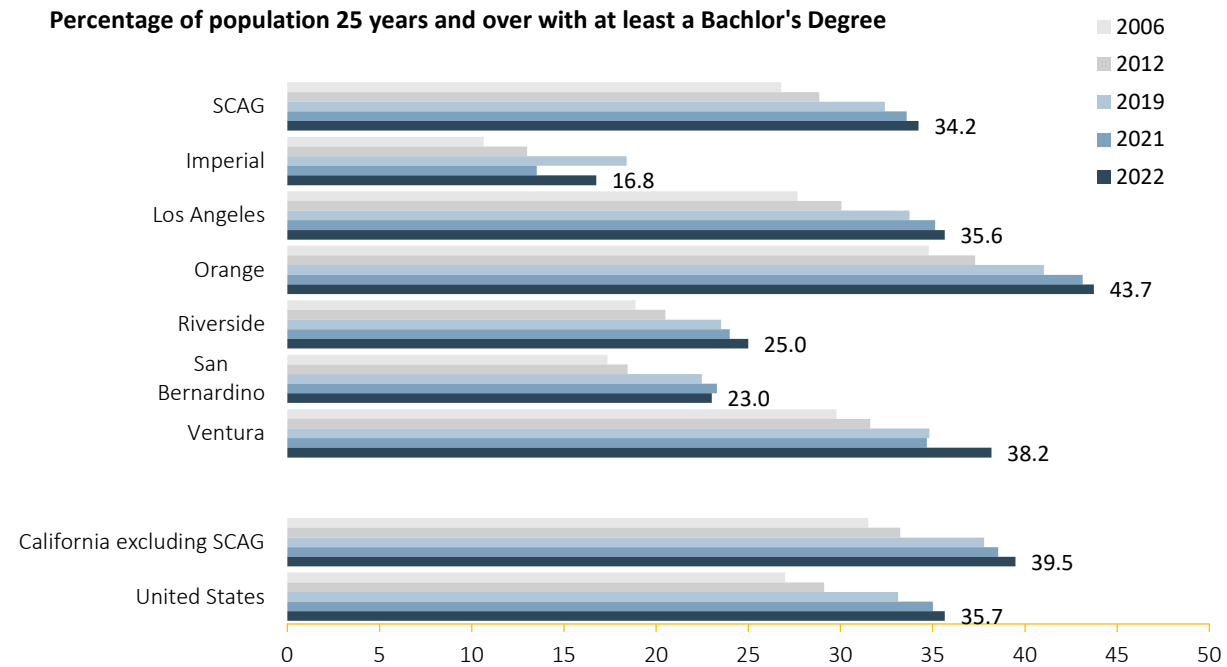
- Demographic and socioeconomic characteristics
- Labor force participation and self-employment
- Commute mode, including work-from-home
- Geographic mobility
- Housing cost burden, tenure, and crowding
- Healthcare coverage and broadband access

The American Community Survey (ACS) is the nation’s most current and accessible data source for local statistics on critical planning topics. The ACS one-year estimates provide consistent measures across time and space and have been released annually since 2006 (with the exception of 2020, due to sampling challenges caused by the COVID-19 pandemic). ACS one-year estimates are available for geographies of 65,000+ population, which includes all Southern California counties.

This report compares the newest available data, from 2022, against both 2021 and pre-pandemic levels; it also includes 2006 and 2012 to assess longer-term change.

College Education Rates

College education rates have continued to gradually increase, though San Bernardino County remains a unique outlier.



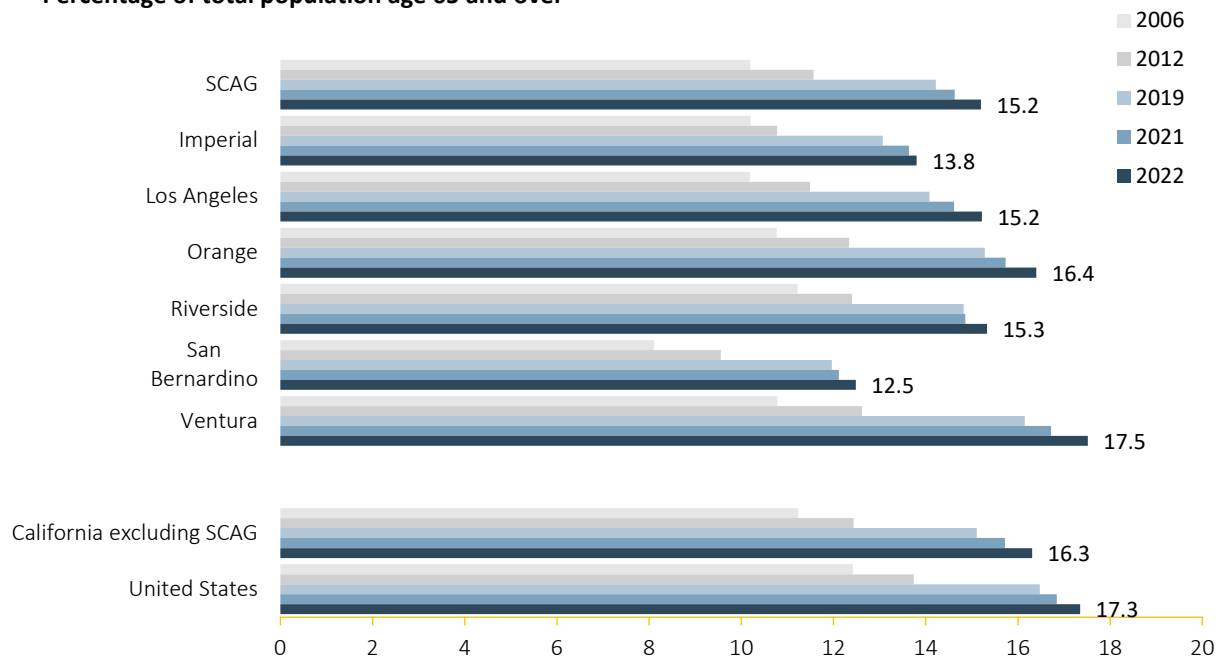
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table C15002

College education rates continued to increase in Southern California in the past year. In the SCAG region, 34.2 percent of the residents age 25 and over had at least a bachelor’s degree in 2022. The region faces notable disparities in educational attainment. College education rates have been considerably higher in the coastal counties of Orange (43.7 percent), Ventura (38.2 percent), and Los Angeles (35.6 percent) than the rest of the region. San Bernardino County not only had the lowest college education rate in 2022 (23.0 percent), but it is also the only place where college education rates declined in the past year – a trend unmatched by any other large county in this data. In 2022, Southern California’s college education rate lagged the nation by 1.5 percentage points and the rest of the state by more than 5 percentage points.

Population Age 65 and Over

Southern California’s population continued to age in all areas, with an acceleration in the population crossing the traditional threshold of senior citizenship.

Percentage of total population age 65 and over



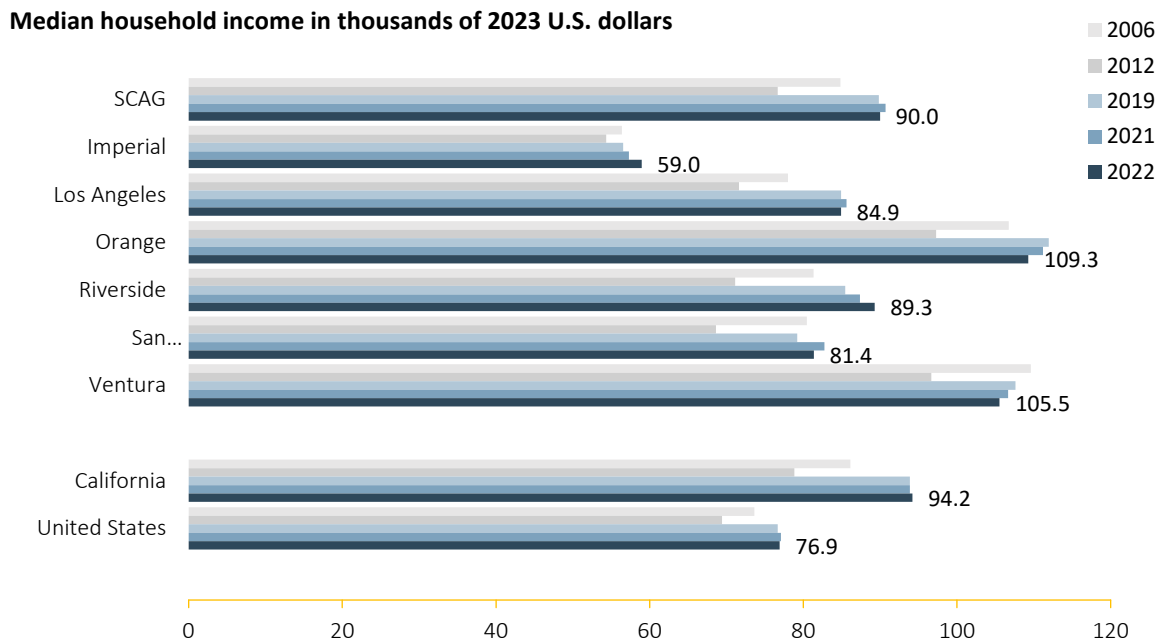
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B01001

Southern California continued to experience an aging population trend but remained slightly younger than the U.S. and the rest of the state. This is not surprising, as the majority of the large baby boomer generation has now crossed the traditional threshold for retirement age. The share of the population age 65 and over in the SCAG region was 15.2 percent in 2022. This is 0.6 percentage points higher than 2021 and 1.0 percentage points higher than 2019, suggesting an acceleration of senior citizen population share. However, senior citizen population share in the SCAG region is more than 2 percentage points lower than in the U.S. and 1 percentage point below the rest of California.

The coastal counties of Ventura and Orange continued to have higher shares of senior population, with 17.5 percent and 16.4 percent of the population age 65 and older, respectively. San Bernardino County had the smallest share of population age 65 and over (12.5 percent). Nonetheless, with the large and growing aging population, Southern California would need to address challenges related to healthcare access and affordable housing for senior residents.

Median Household Income

Real median incomes decreased in Southern California and nationally, suggesting that inflation outpaced income growth.



Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B19013

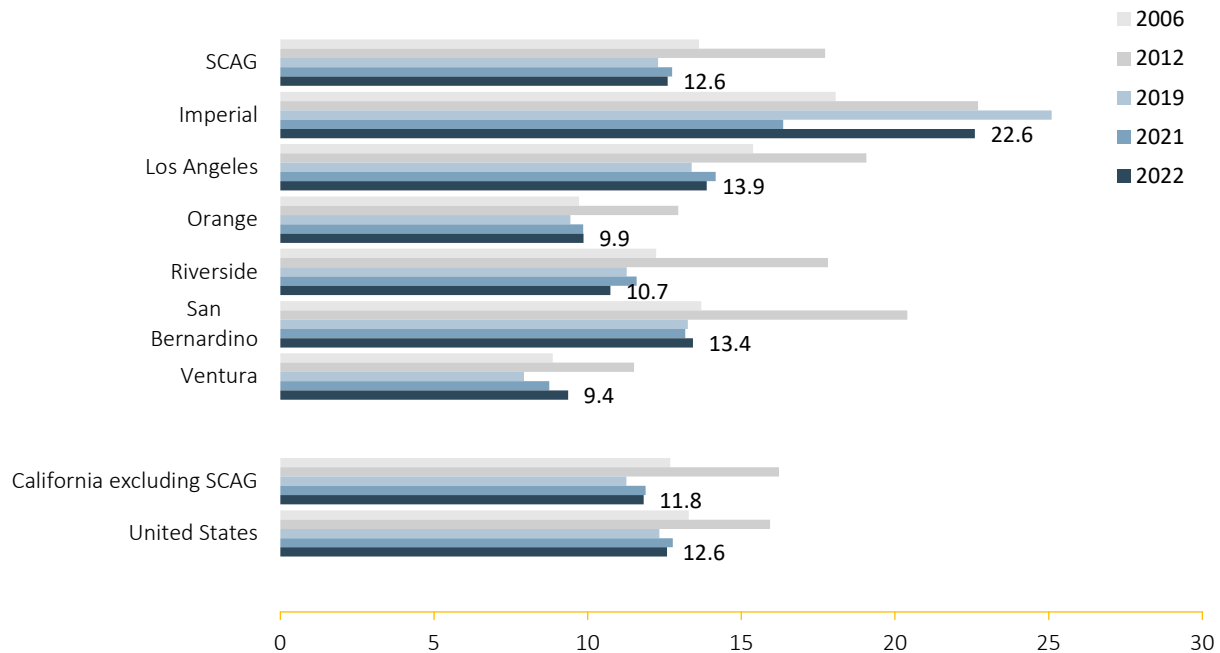
Real median household incomes decreased in most Southern California counties, region-wide, and nationally between 2021 and 2022. This suggests that inflation outpaced income growth in most places. The region’s real median household income in constant 2023 dollars (\$89,990) was slightly lower than in 2021 (\$90,686). The nationwide real median household income of \$76,925 also dropped slightly in the past year (from \$77,083); however, California’s real median household income exceeded inflation modestly, rising from \$93,878 to \$94,209. Within the SCAG region, only Imperial and Riverside Counties saw increases in real median incomes in the past year.

When adjusting for inflation, the region’s median household income increased by only 6.1 percent (\$5,175) in the 16 years since the ACS began collecting data in 2006. This increase is smaller than the long-run increase of 9.4 percent statewide, but greater than the 4.5 percent increase nationwide.

Poverty Rate

Poverty rates changed little in the SCAG region, statewide and nationally.

Percentage of people with income below poverty level

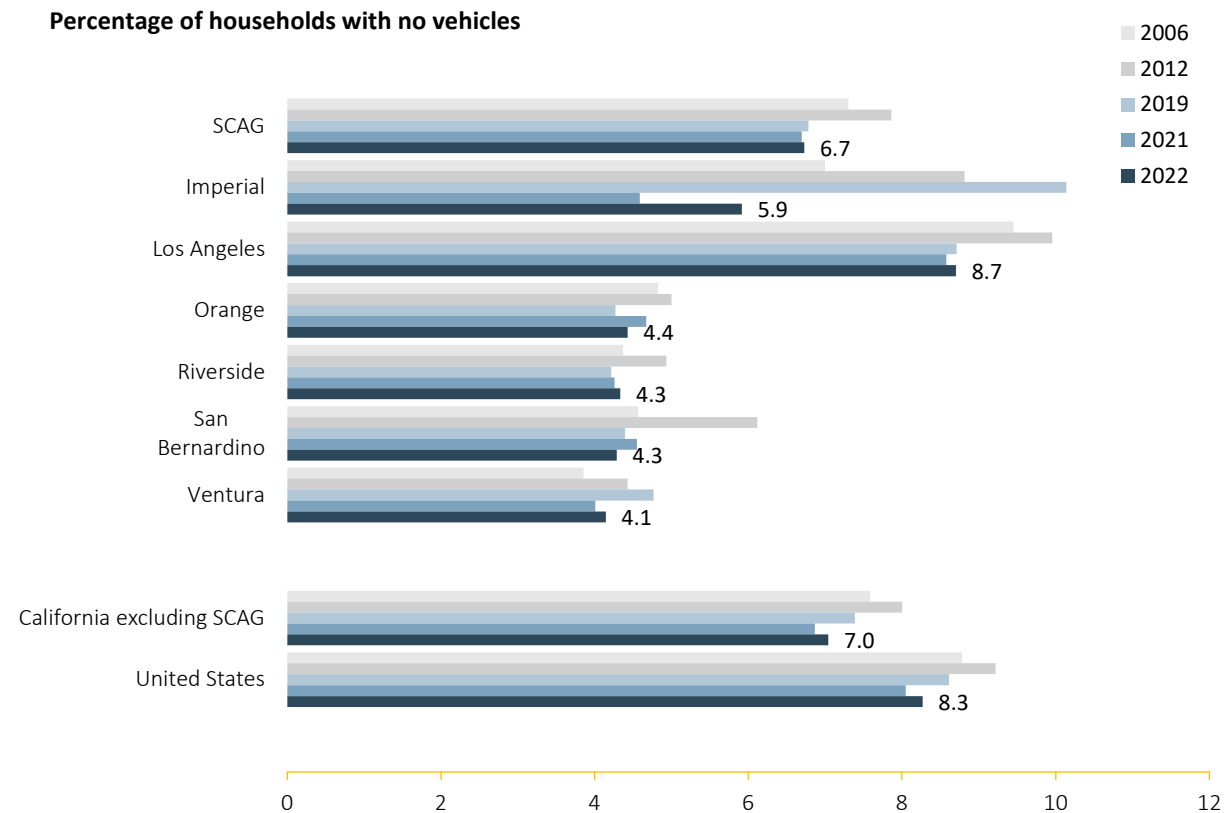


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table S1701

Poverty rate is a key indicator of economic well-being. Between 2021 and 2022, poverty rates changed little regionwide, statewide, and nationally. This may be in part due to the fact that the calculation of poverty rate only takes into account cash income and does not reflect noncash governmental aid, including some of the safety net programs during the pandemic. Poverty rates were at 12.6 percent in the SCAG region and nationally, slightly above the non-SCAG portion of California (11.8 percent). The most drastic change in poverty rate occurred in Imperial County, up from 16.4 percent in 2021 to 22.6 percent in 2022. The rise in poverty rate in Imperial County, coupled with the increases in household incomes, suggest that income inequality may be an increasing concern.

Households with No Vehicles

The share of households with no vehicles remained stable in the SCAG region, but saw a modest increase nationally.



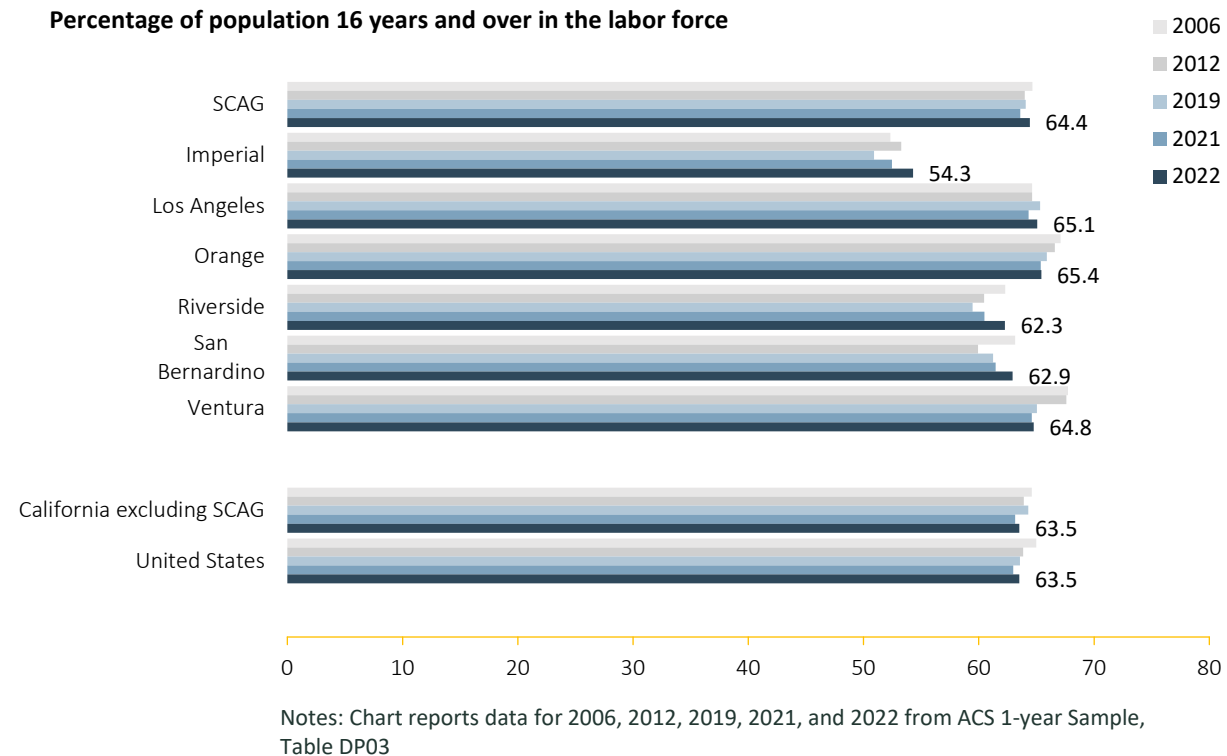
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table DP04

The share of households not owning a vehicle is influenced by various factors such as transit infrastructure, economic conditions, and lifestyle preferences. Households with no vehicles accounted for 6.7 percent of all households in the SCAG region. This compares to 7.0 percent in the rest of California and 8.3 percent nationwide.

Within the SCAG region, the share of households with no vehicles was highest in Los Angeles County, at 8.7 percent in 2022, but below 5 percent in the counties of Orange, Riverside, San Bernardino, and Ventura.

Labor Force Participation

Despite the aging population, labor force participation increased in all areas in the past year.



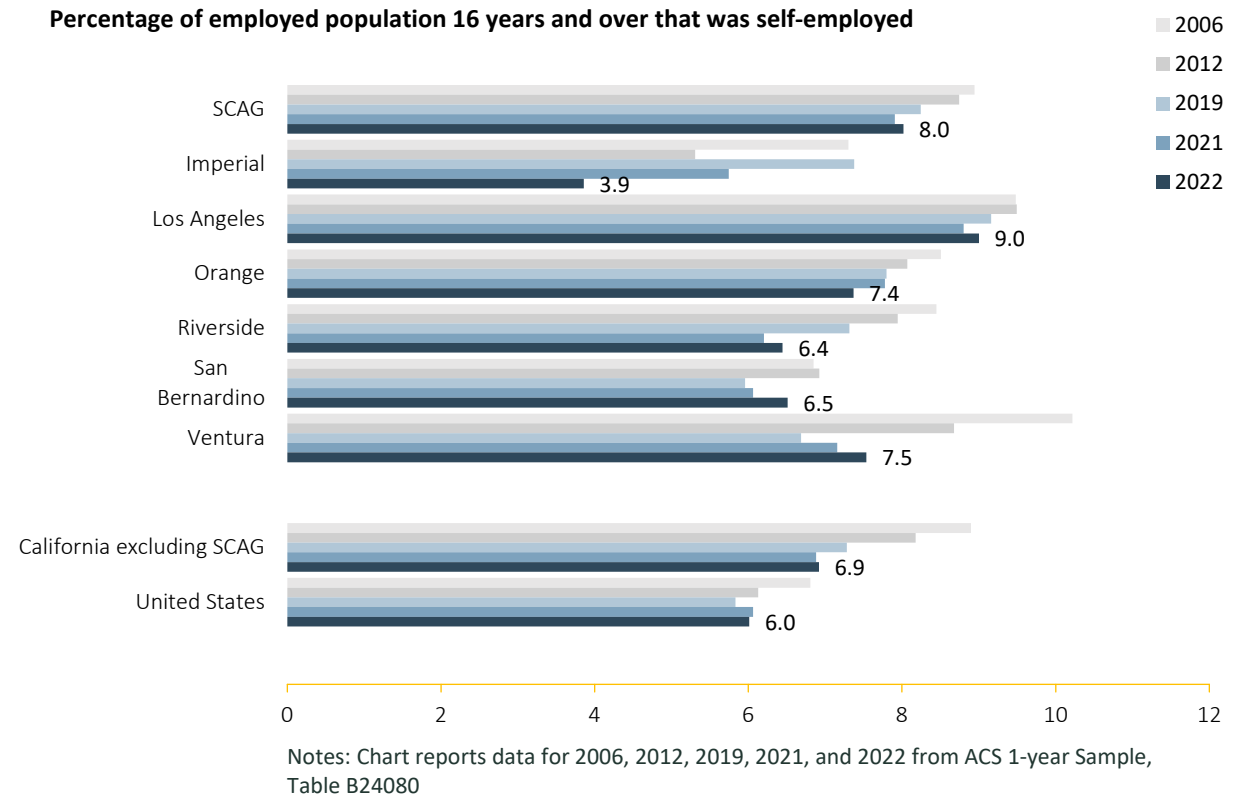
Southern California’s unemployment rate returned to its pre-COVID watermark of below 5 percent during early 2022. Many businesses reported difficulty finding workers and wages rose in general, leading to a hypothesis that this may be due to a decrease in labor force participation.

While labor force participation rates were modestly lower in 2021 than before the pandemic in 2019, they rose universally across the region, statewide, and nationally between 2021 and 2022, with the rate in the SCAG region increasing from 63.6 percent to 64.4 percent. This increase is more noteworthy considering that the share of the population age 65 and over in the region, which is included in the labor force calculation, is a full percentage point higher than it was in 2019.

Southern California’s labor force participation rate remains nearly a full percent higher than in the rest of the state and nation (both 63.5 percent). While rates are slightly higher in coastal counties (a high of 65.42 percent in Orange County), the biggest increases in labor force participation in the last year occurred in inland counties (Riverside County increased from 60.5 to 62.3 percent).

Self-Employment

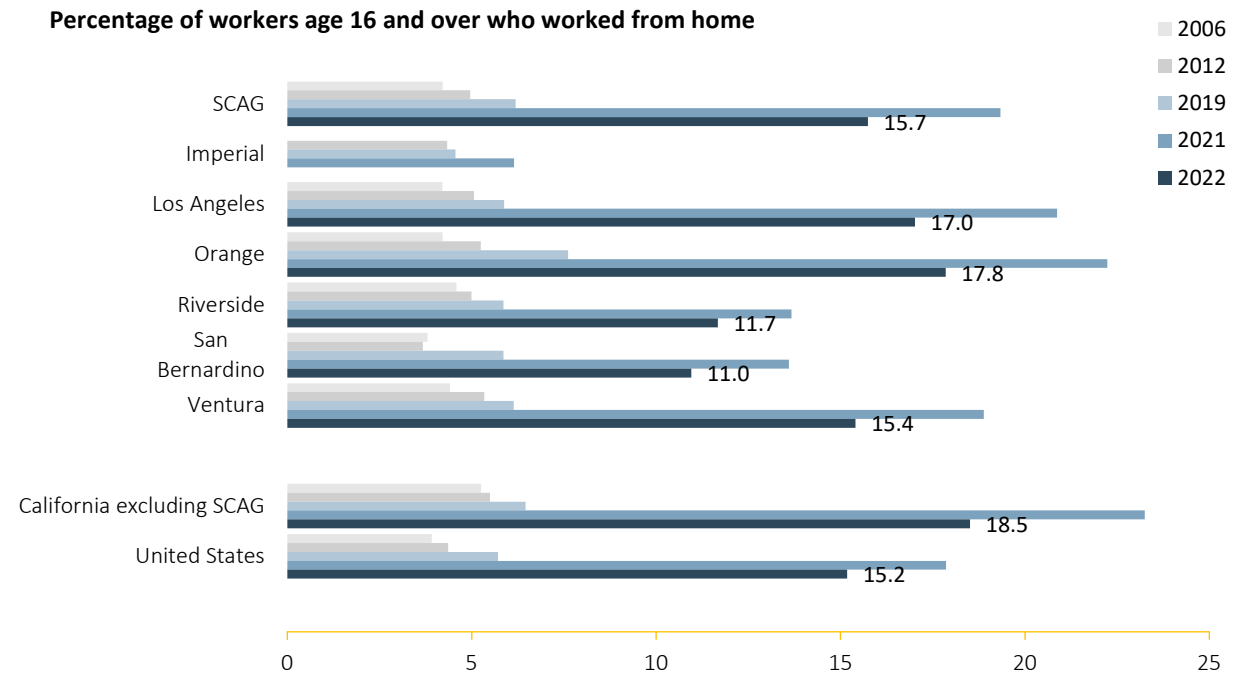
Self-employment rates increased slightly across California, but dropped nationally.



SCAG region’s self-employment rate increased slightly from 7.9 percent in 2021 to 8.0 percent in 2022. Self-employment remained a larger share of employment in the SCAG region than the rest of the state and nation (6.9 and 6.0 percent, respectively). Trends in self-employment between 2019 and 2022 varied widely across the SCAG counties. Self-employment rates have increased gradually in the counties of San Bernardino and Ventura but decreased in Imperial and Orange Counties. In Los Angeles and Riverside Counties, self-employment rates took a dip in 2021 and slightly recovered in 2022, though still lower than their pre-pandemic levels. These trends are reflective of the different industry compositions across the region and the varying degree of resilience to economic challenges brought by the COVID-19 pandemic. Nationally, the self-employment rate slightly declined in the past year but remained above its 2019 level of 5.8 percent.

Work from Home

Work-from-home shares declined substantially in the past year, but were still more than double pre-pandemic levels.



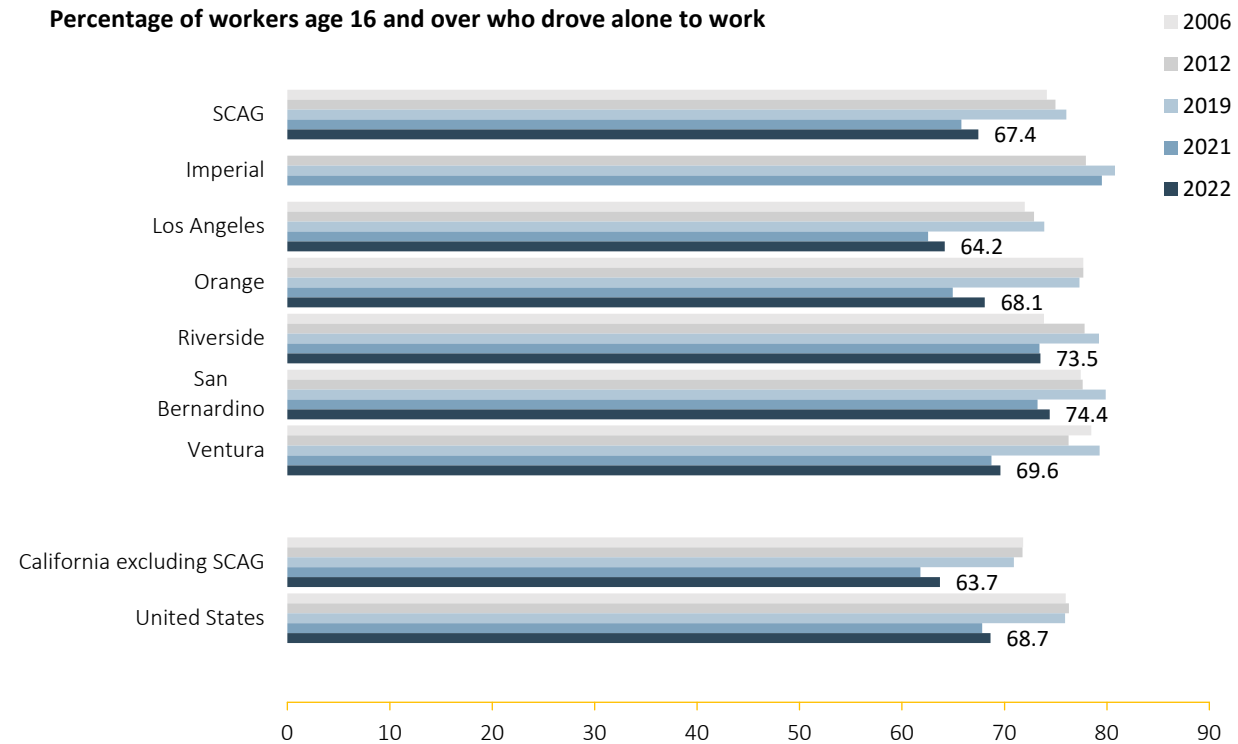
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B08006. Data for Imperial County are from the 5-year sample, if available.

The share of workers who report their commute mode as “working from home” declined from 19.3 percent to 15.7 percent between 2021 and 2022 in the SCAG region. The region’s work-from-home share remains lower than in the rest of the state, though the difference is shrinking (3.9 percentage points lower in 2021 and 2.8 percentage points lower in 2022). The sharp decline in the region’s work-from-home share is expected as people have begun returning to the office or shifting from fully remote work to hybrid work arrangements, which are not adequately captured by the current ACS questionnaire.

Despite the decline, the work-from-home share in 2022 was more than double the pre-pandemic level in most Southern California counties, statewide, and nationally (in 2019, the SCAG region work-from-home share was 6.2 percent). Work-from-home shares vary widely across the region, with rates of 11.7 percent to 11.0 percent in Riverside and San Bernardino Counties, and rates of 17.0 percent and 17.8 percent in Los Angeles and Orange Counties, respectively, reflecting differences in the composition of industries and occupations across the region.

Drive Alone to Work

Single-occupant vehicle commuting increased in all places as telework declined, but remained well below pre-pandemic levels.



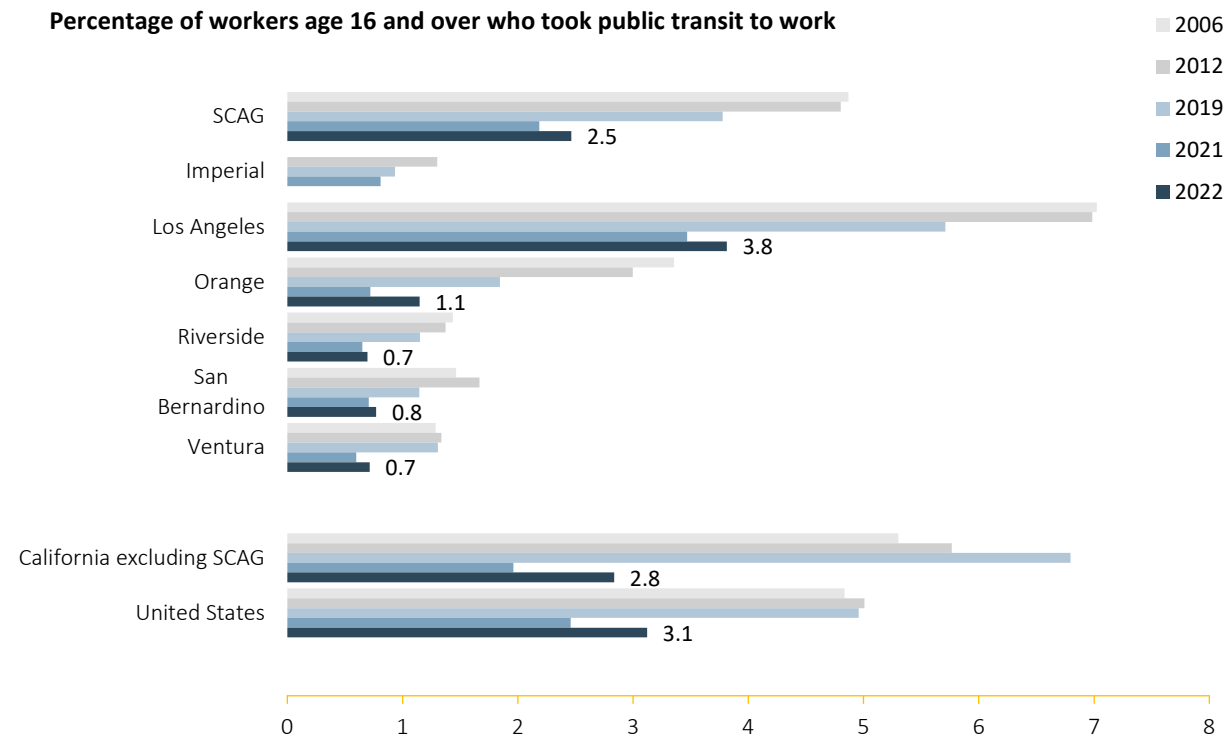
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B08006. Data for Imperial County are from the 5-year sample, if available.

After dropping from 76.0 percent in 2019 to 65.8 percent in 2021, the share of workers in Southern California who drove alone to work increased slightly to 67.4 percent in 2022. Within the SCAG region, driving alone shares were highest in the counties of San Bernardino (74.4 percent) and Riverside (73.5 percent), but increased the most in Orange and Los Angeles Counties.

The share of workers driving alone to work in the SCAG region was higher than the rest of California (63.7 percent) but slightly lower than the nation (68.7 percent). The ACS questionnaire does not include information about non-work travel patterns, thus this data does not inform on single-occupant vehicle use for all trip types.

Transit Commuting

Commuting via transit increased in all places as telework declined, but remained well below pre-pandemic levels.



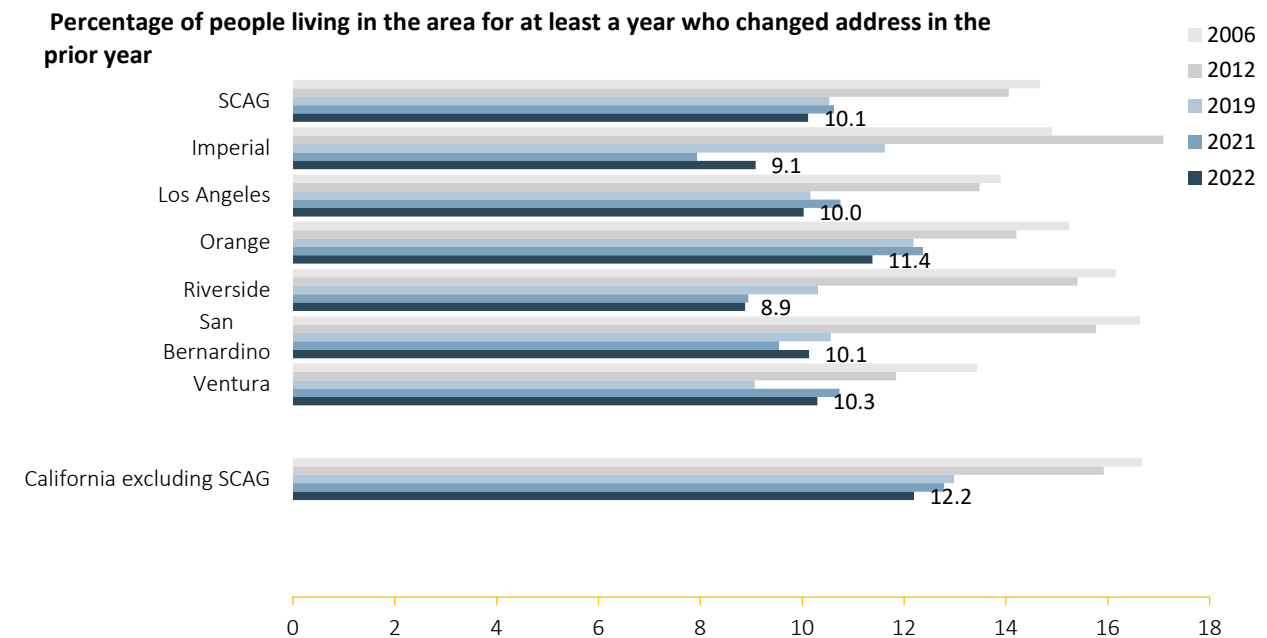
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B08006. Data for Imperial County are from the 5-year sample, if available.

After dropping from 4.8 percent in 2012 to 3.8 percent in 2019 and 2.2 percent in 2021, the share of workers commuting to work via transit in the region increased modestly to 2.5 percent in 2022. However, the rest of California and the U.S. saw a larger increase in the share of transit commute in the past year (0.9 and 0.7 percentage points, respectively).

Within the SCAG region, transit mode share remained below 1 percent in Riverside, San Bernardino, and Ventura Counties in 2022. The share of workers using transit to commute was highest in Los Angeles County (3.8 percent) but was still well below its 2019 level (5.7 percent).

Overall Geographic Mobility

Geographic mobility continued its longstanding decline in most of Southern California and statewide, and a pandemic-affected trend of increasing mobility in coastal counties has subsided.

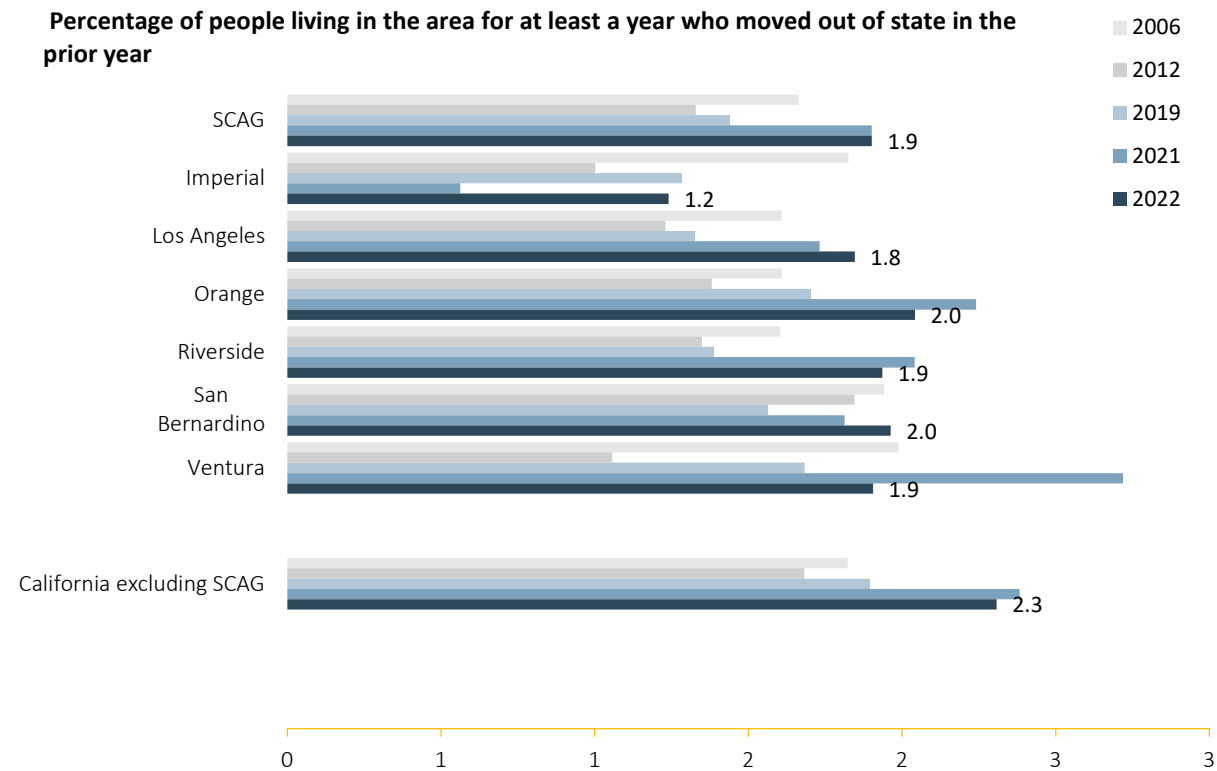


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B07403

Residential mobility dropped over the period of 2006-2019 in most places. Between 2019 and 2021, mobility increased slightly in the coastal counties Los Angeles, Orange, and Ventura while decreasing in the three inland counties. Between 2021 and 2022 the trends were reversed again, with mobility decreasing in coastal counties and increasing in inland counties, suggesting a rebound back from a temporary effect of the pandemic. In 2022, 10.1 percent of Southern Californians changed addresses. This compares to 14.7 percent in 2006 and 10.6 percent in 2021, reflecting a continuation of the longstanding decline. The rest of California has been on a similar long-run trajectory; in 2022 the share of movers in the rest of the state was 2.1 percentage points higher than the SCAG region.

Out-of-State Moves

The share of Southern Californians leaving the state rose substantially in 2021, but stayed the same in 2022.

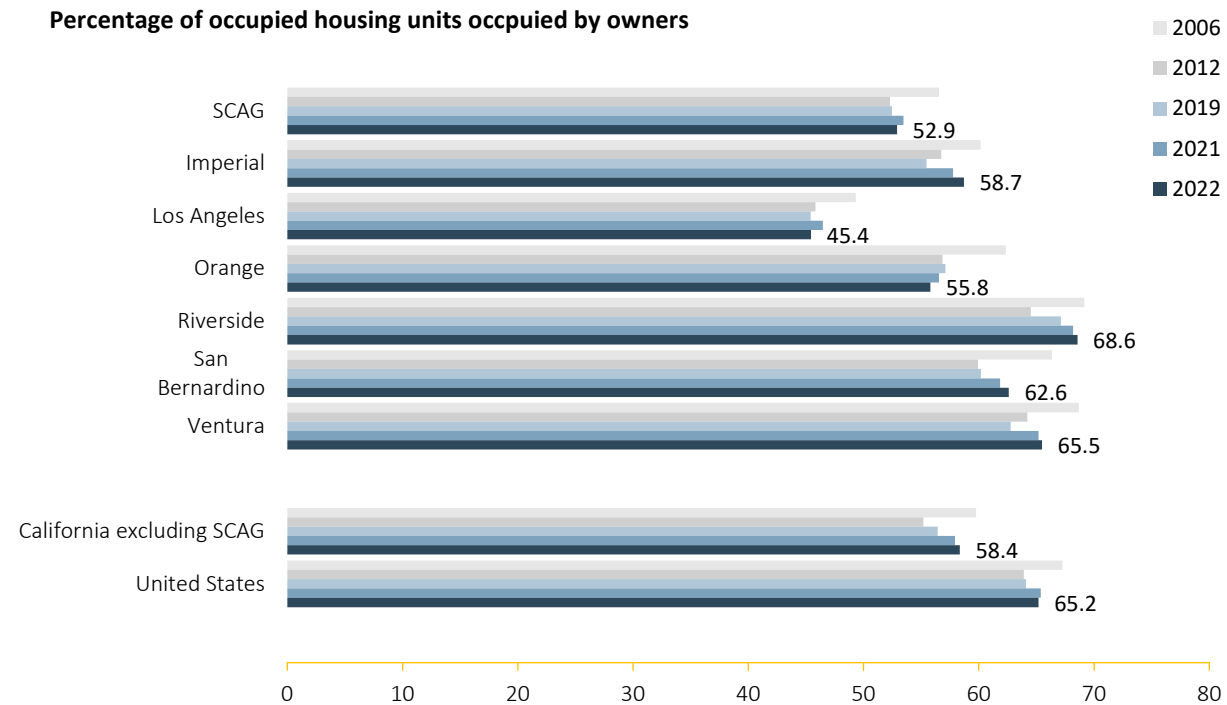


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B07403

The share of Southern California residents who left the region for another state in the prior year went up during the pandemic, from 1.4 percent in 2019 to 1.9 percent in 2021. This increase was seen in all SCAG counties except Imperial County. Residents of the rest of California also left the state in higher numbers in 2021 than 2019. Out-of-state moves in 2022 are very similar to 2021, with 1.9 percent of SCAG region residents leaving the state and all other areas (except Imperial County) remaining at an elevated level compared to pre-pandemic.

Homeownership

Homeownership went down slightly region-wide and nationally but increased in the rest of California.



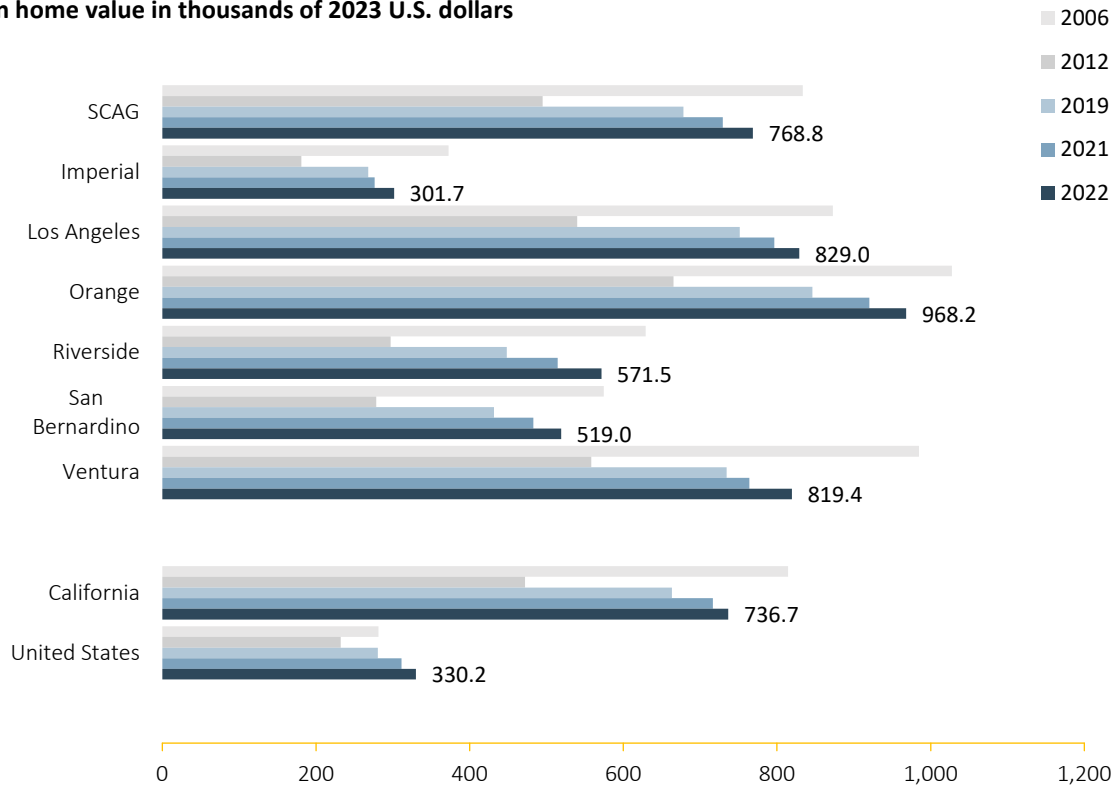
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25014

The homeownership rate in the SCAG region decreased slightly from 53.5 percent in 2021 to 52.9 percent in 2022 and remained well below the nation (65.2 percent) and the rest of the state (58.4 percent). Within the SCAG region, homeownership varied widely, ranging from 45.4 percent in Los Angeles County to 68.6 percent in Riverside County. The slight drop in region-wide homeownership reflects the drop in the larger counties of Los Angeles and Orange (1.0 and 0.7 percentage points, respectively) despite modest increases elsewhere in the region. The homeownership rate also increased modestly in the rest of California and decreased modestly nationwide. Homeownership in all places was still well below 2006 levels, during which time 56.5 percent of the SCAG region’s households were homeowners.

Median Home Value

Real median home values increased at varying rates across the SCAG counties.

Median home value in thousands of 2023 U.S. dollars

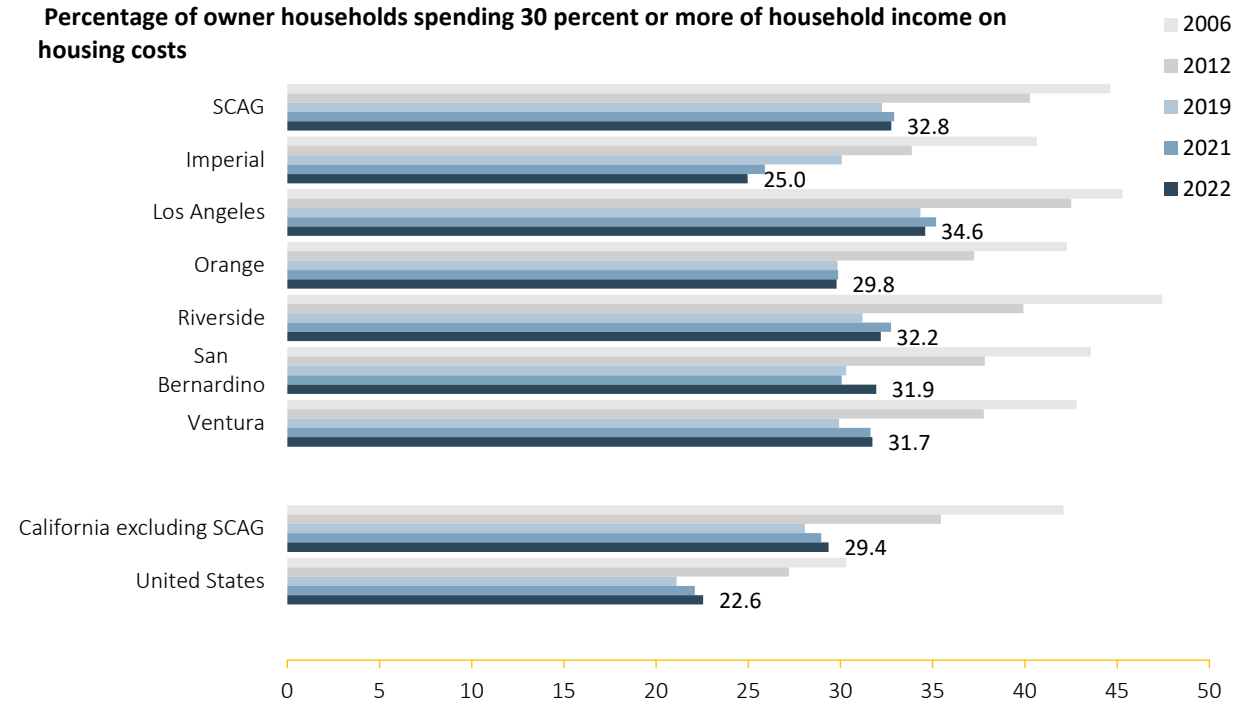


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25077

Inflation-adjusted median home value in the SCAG region increased by 5.4 percent to \$768,790 between 2021 and 2022. This is slightly below the 6.1 percent increase nationally but well above the 2.8 percent increase statewide. Within the SCAG region, real home values increased most drastically in the counties of Riverside (+11.1 percent), Imperial (+9.2 percent), and San Bernardino (+7.5 percent). This suggests that the relatively low-cost inland counties are becoming less affordable. Changes in real median home values were uneven within the coastal counties, ranging from a 7.3 percent increase in Ventura County to a 4.1 percent increase in Los Angeles County.

Housing Cost Burden – Homeowners

Cost burden rates among homeowners remained stable in most of Southern California.



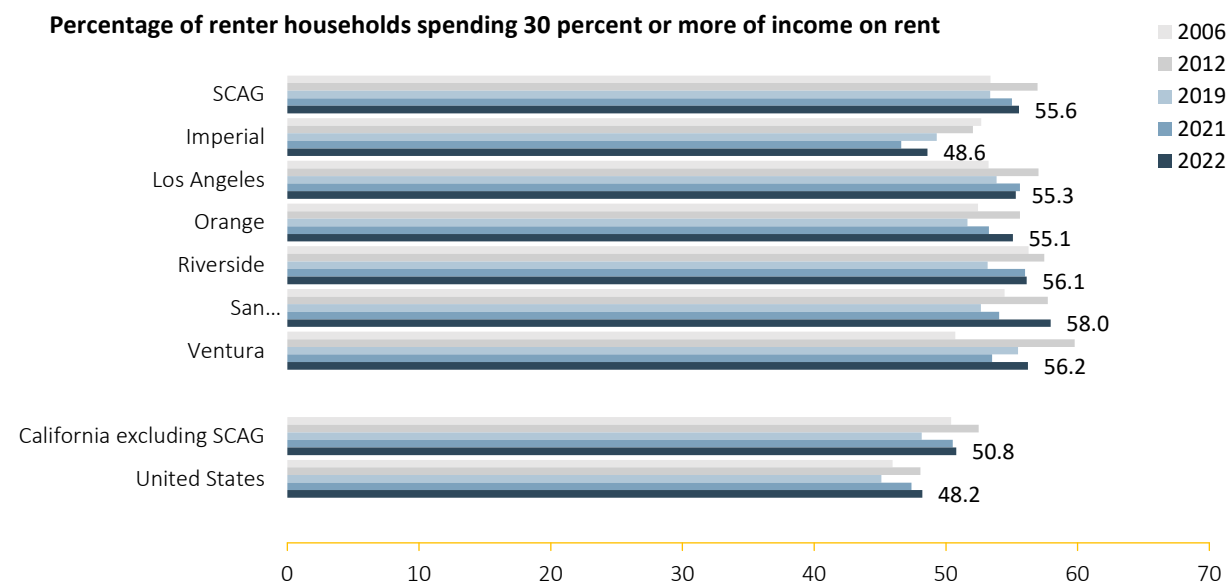
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25106

High housing cost burdens reflect tradeoffs that households make between housing and non-housing consumptions and could contribute to a larger sense of precarity particularly for lower-income households. The share of homeowners that were cost-burdened in the SCAG region have decreased substantially since 2012 but remained stable over the period of 2019-2022. Most Southern California counties saw little change in the cost burden rate among homeowners between 2021 and 2022. San Bernardino County’s cost burden share of homeowners increased the most, from 30.1 percent to 31.9 percent. SCAG region housing cost burden among homeowners (32.8 percent) continues to exceed the rest of the state and nation by a wide margin (29.4 and 22.6 percent, respectively).

Cost-burdened homeowners are defined as owner households spending 30 percent or more of household income on housing costs.

Housing Cost Burden – Renters

Housing cost burden among renters continued to increase in Southern California – more than half of the region’s renter households were cost-burdened in 2022.



Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25070

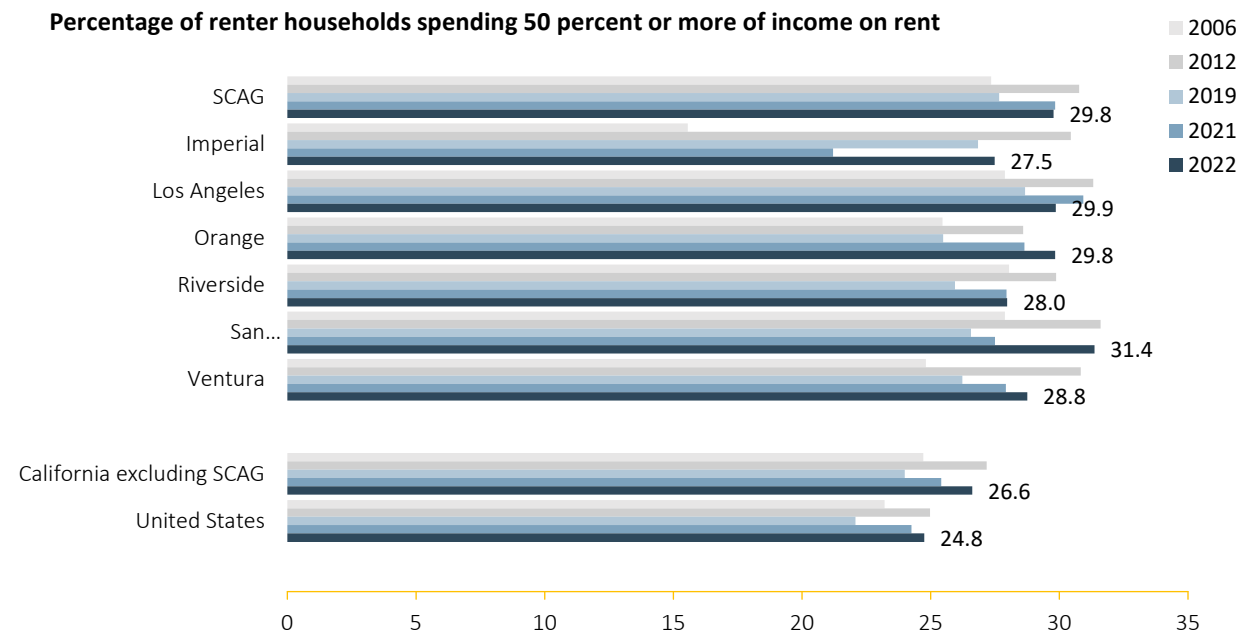
While the share of owner households that were cost-burdened changed little, renter cost burden has increased since 2019 in most of Southern California. While the recent increase in interest rates appears to have had little effect on existing homeowners’ cost burden, it could keep more households in the rental market and affect renter cost burden.

The share of renter households that were cost-burdened remained stable in Los Angeles County but increased by more than 2 percentage points in the counties of Imperial, San Bernardino, and Ventura between 2021 and 2022. Renter cost-burden rates in San Bernardino County were both the highest in 2022 (58.0 percent) and increased the most in the past year (by 3.9 percentage points). The SCAG region’s renter cost burden rate, while just up slightly at 55.6 percent in 2022, was well above the rates in the rest of California (50.8 percent) and nationwide (48.2 percent). In all counties in the SCAG region except Imperial County, more than half of the households were cost burdened in 2022.

Cost-burdened renters are defined as renter households spending 30 percent or more of household income on gross rents.

Severe Housing Cost Burden – Renters

Severe cost burden among renters was higher in Southern California than the rest of the state and nationally; increased in most places except Los Angeles County.



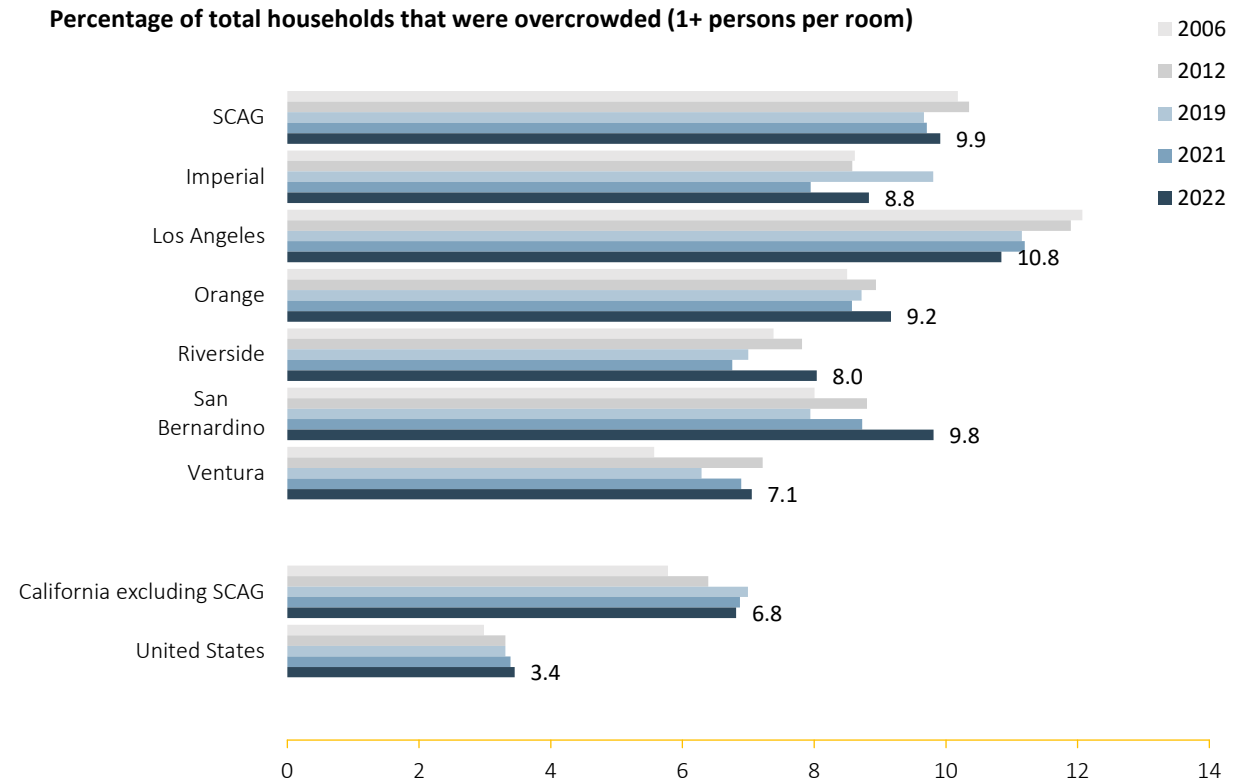
Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25070

The ACS also tracks renters that are severely cost-burdened (defined as those spending 50 percent or more of their household income on rent). Severely cost-burdened renters are particularly susceptible to the risk of displacement and other kinds of housing stress. The region’s severe cost burden rate among renters changed little between 2021 and 2022 but remained 2 percentage points higher than the pre-pandemic level. The share of renters that were severely cost-burdened increased most substantially in Imperial and San Bernardino Counties, up by over 6 percentage points and 3 percentage points, respectively. Contrasting the rest of the SCAG region, Los Angeles County saw a full percentage point decrease in renter severe cost burden rate. This decline could reflect the relocation of severely cost-burdened renters out of the county, which could put upward pressure on rents in other parts of the region.

The SCAG region’s severe cost burden rate among renters was at 29.8 percent in 2022, considerably higher than the rest of the state (26.6 percent) and the nation (24.8 percent).

Household Crowding – Total

Southern California households’ overcrowding increased slightly and continued to exceed the state and nation by a wide margin.

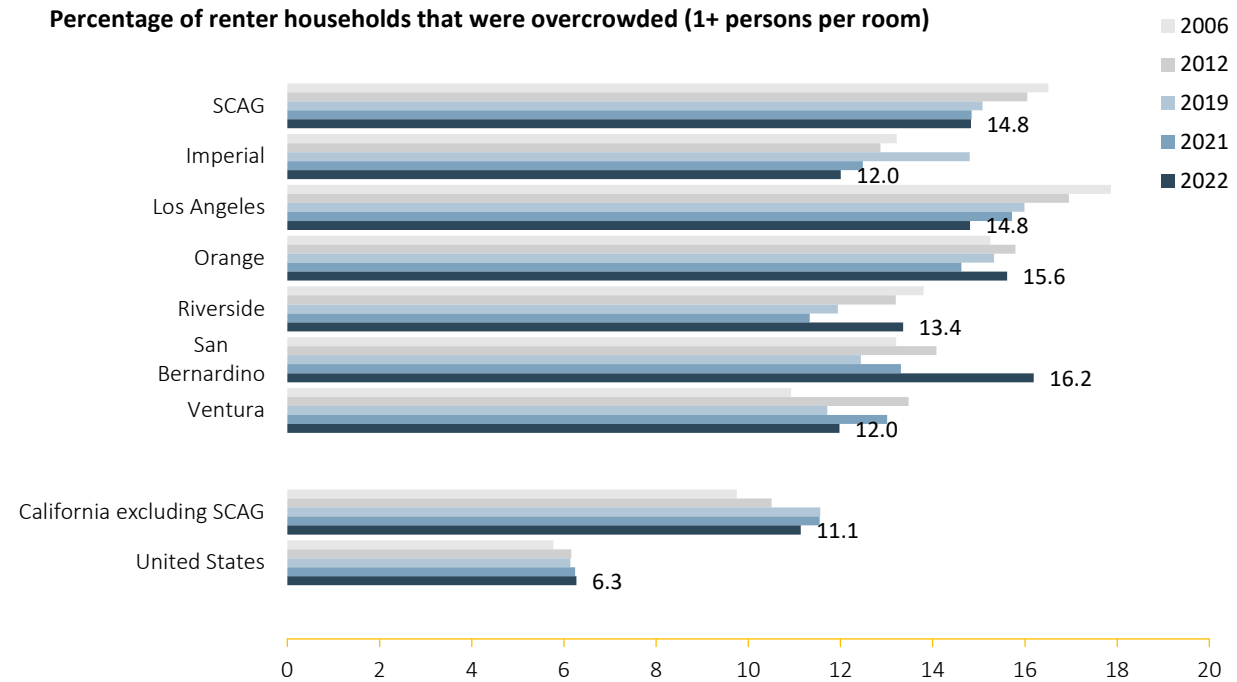


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25014

Addressing overcrowding, which is defined as occupied housing units with 1 or more persons per room, is essential for ensuring housing stability and reducing homelessness. During the 2010s the SCAG region’s overcrowding rate dropped modestly to a low of 9.7 percent in 2019; however, it has increased slightly over the past two years, reaching 9.9 percent in 2022. Los Angeles County has the region’s highest overcrowding rate at 10.8 percent but also its largest decrease in the past year (having declined from 11.2 percent in 2021). However, this decline in the region’s largest county was smaller than the increases seen in the region’s other five counties. Both Riverside and San Bernardino Counties had increases in overcrowding above 1 percentage point in the past year. SCAG region household overcrowding continues to exceed the rest of the state (6.8 percent) and nation (3.4 percent) by a wide margin.

Household Crowding – Renters

Renter overcrowding remained stable in Southern California but dropped modestly in the rest of the state.

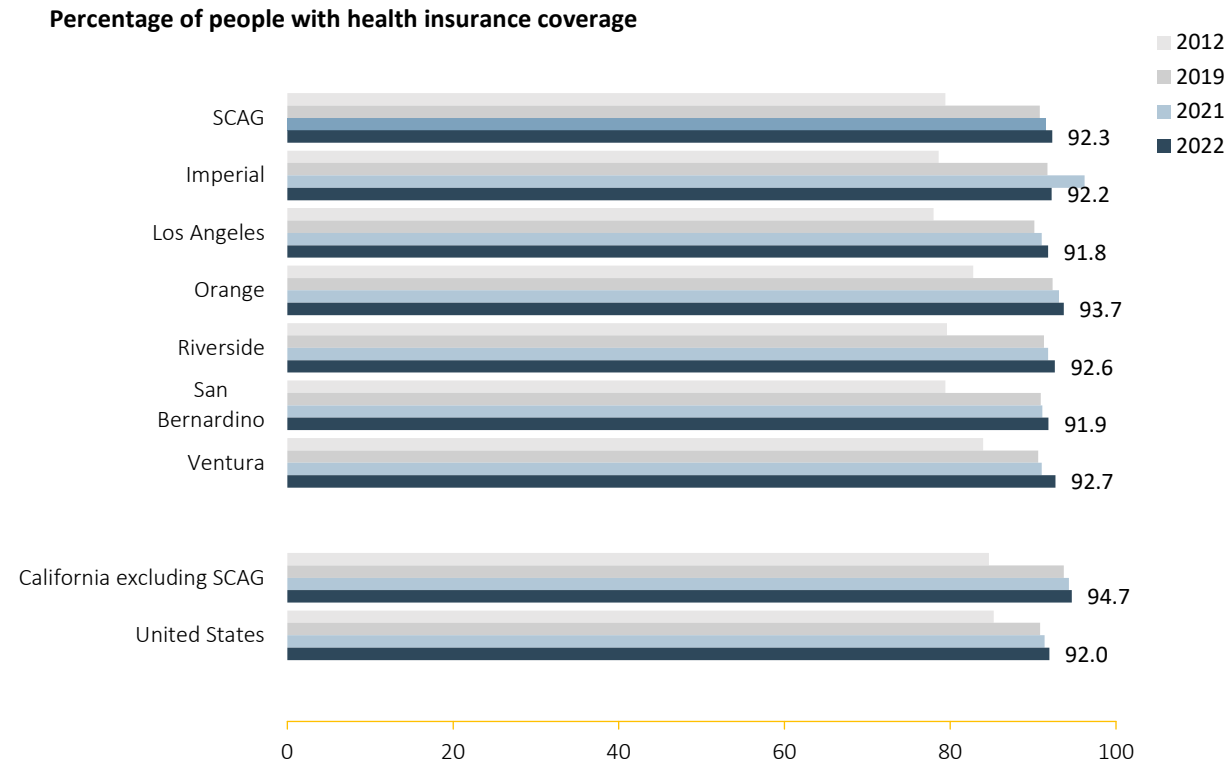


Notes: Chart reports data for 2006, 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B25014

The share of renter households in the SCAG region that were overcrowded – defined as occupied housing units with 1 or more persons per room – was at 14.8 percent in 2022. This compares to 11.1 percent in the rest of the state and 6.3 percent nationwide. Within the SCAG region, renter overcrowding increased by more than 2 percentage points in the inland counties of Riverside and San Bernardino between 2021 and 2022. This contrasts a roughly 1 percentage point decrease in Los Angeles and Ventura Counties. Despite a persistent decline regionally since 2006, renter overcrowding in San Bernardino County was 2.9 percentage points higher than its 2006 level.

Health Insurance Coverage

Health insurance coverage continued to increase in most areas.

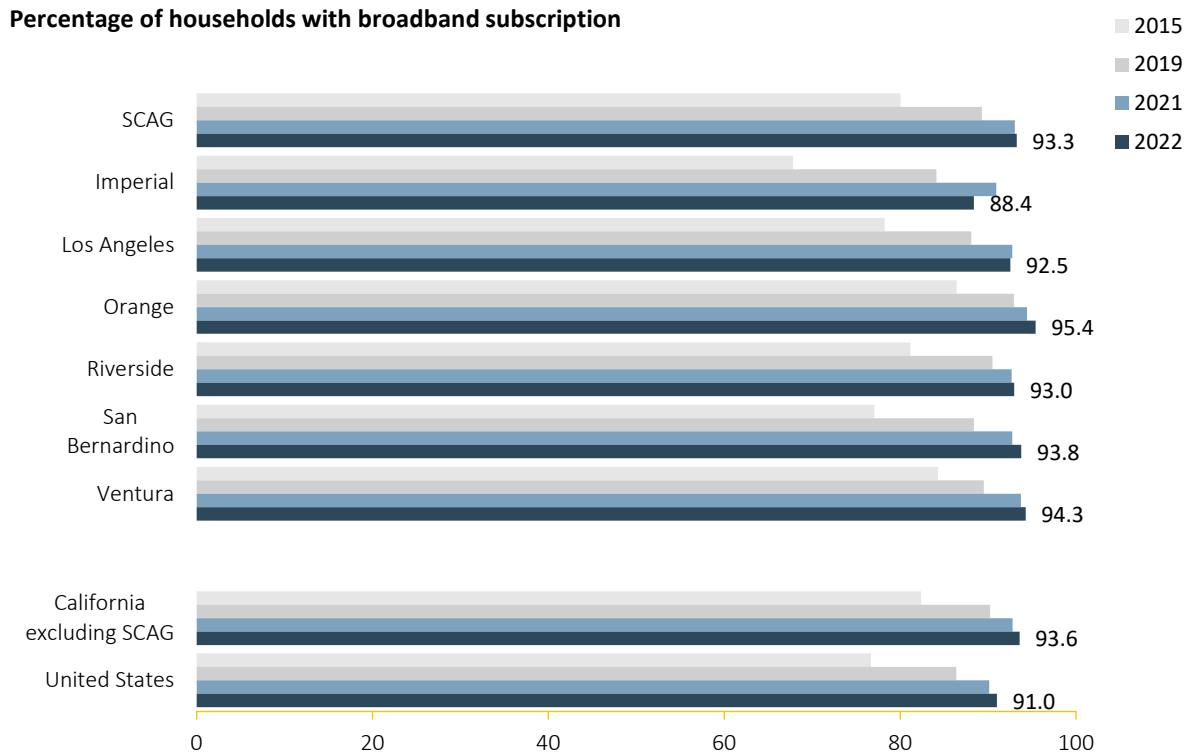


Notes: Chart reports data for 2012, 2019, 2021, and 2022 from ACS 1-year Sample, Table B18135

Health insurance coverage rates in all places have increased since 2019. This follows a substantial increase in coverage rates from 2012 as the Affordable Care Act expanded affordable health insurance options and Medicaid coverage in early 2010s. Health coverage rate was highest in Imperial County in 2021 (96.2 percent) but dropped to 92.2 percent in 2022. Other SCAG counties saw slight increases between 2021 and 2022. The region’s health insurance coverage increased from 91.6 percent in 2021 to 92.3 percent in 2022, which was over 2 percentage points lower than the rest of California (94.7 percent) but slightly higher than the nation (92.0 percent).

Broadband Access

Broadband access continued to increase in nearly all places.



Notes: Chart reports data for 2015, 2019, 2021, and 2022 from ACS 1-year Sample, Table S2801

Broadband is essential infrastructure for the 21st century, offering people significant time savings and a digital avenue for economic prosperity, largely through the ability to telework. In 2022, broadband access in the SCAG region (93.2 percent of households) was comparable with the rest of the state (93.6 percent) and slightly higher than the nation (91.0 percent). Broadband access rates have steadily risen since 2015 – the first year of data available – when 80.0 percent of the region’s households had access. All areas except Imperial County saw continued marginal increases in broadband access between 2021 and 2022.



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