

AMERICAN COMMUNITY SURVEY 2021 1-YEAR ESTIMATES

A FIRST LOOK AT POST-COVID SOUTHERN CALIFORNIA

SEPTEMBER 15, 2022





ABOUT SCAG

SCAG is the nation's largest metropolitan planning organization (MPO), representing six counties, 191 cities and more than 19 million residents. SCAG undertakes a variety of planning and policy initiatives to encourage a more sustainable Southern California now and in the future.

VISION

Southern California's Catalyst for a Brighter Future

MISSION

To foster innovative regional solutions that improve the lives of Southern Californians through inclusive collaboration, visionary planning, regional advocacy, information sharing, and promoting best practices.

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The COVID-19 pandemic not only impacted trends, it impacted the ability to generate data. The venerable American Community Survey's 2020 1-year estimates were severely pared down due to sampling challenges, meaning that it was only possible to get state-level data on a limited set of topics.

A variety of alternatives have been used such as U.S. Postal Service address changes to track migration and location-based services (i.e., cell phone tracking) to monitor changes to commuting and telework. But the ACS' consistency of measurement across time and space (available each year since 2006 and in a range of geographies covering the entire United States) is a major strength when assessing the magnitude of a change.

Currently the only available Census 2020 data product is the so-called PL-94 file used for congressional redistricting, which lacks core details such as age. We do not anticipate the 2020 Census' Demographics and Housing Characteristics file to be available until May 2023. SCAG reported on the [ACS 2016-2020 5-year upon its release in March 2022](#); however, the vast majority of that sample was collected prior to the pandemic.

This report focuses on and highlights the differences between 2019 and 2021 in order to compare pre- and post-pandemic. We also include 2006 and 2012 to compare against the first year ACS was available and the low-point of the Great Recession in terms of household income.

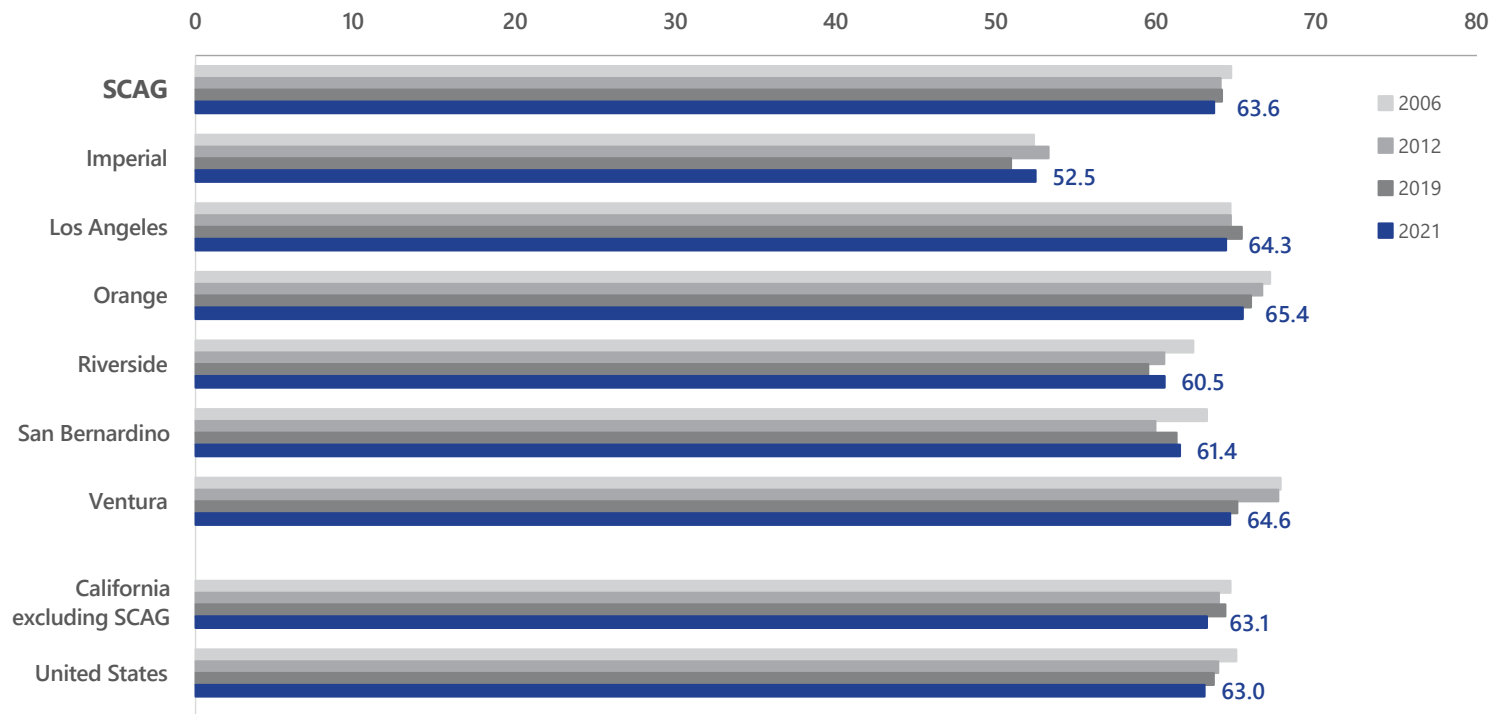
This report compares several topics of interest across the United States, California, the SCAG Region, and its six counties including:

- Labor force and self-employment
- Income and home values
- Housing tenure and crowding
- Vehicle ownership
- Commute mode, including work-from-home
- Geographic mobility

LABOR FORCE PARTICIPATION

Post-pandemic declines in labor force participation are modest and uneven.

Percentage of Population 16 Years and Over in the Labor Force



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP03.

As in much of the rest of the world, the SCAG Region experienced record-breaking unemployment rates due to the COVID pandemic. The region's unemployment rate, however, recovered quickly. One hypothesis for the rapid decrease in the unemployment rate is that people left the labor force, and are therefore not counted in the unemployment rate. However, the 2021 ACS 1-year data show that the labor force participation rate decreased only modestly in most places from 2019-2021.

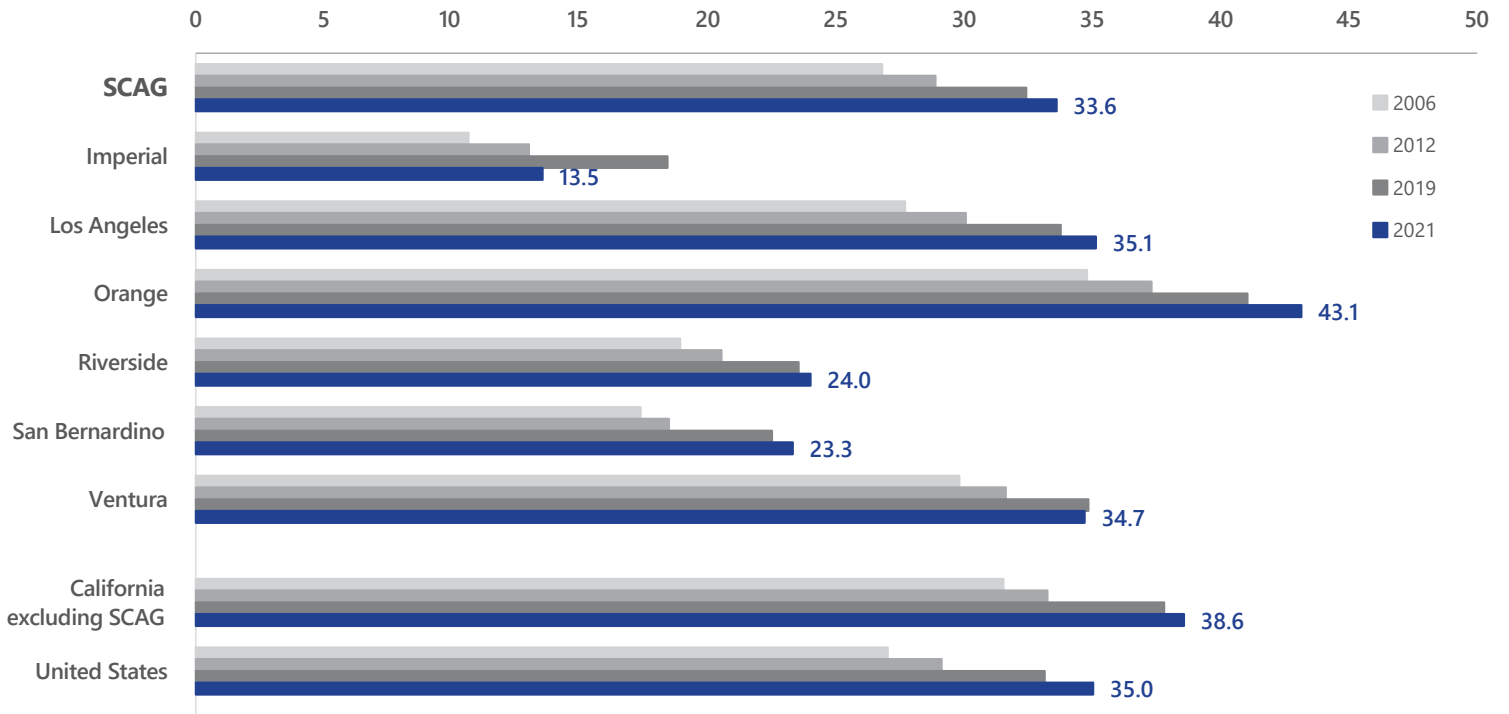
In the SCAG Region this decrease was from 64.1 percent to 63.6 percent. Decreases were greatest in Los Angeles County and in the non-SCAG portions of California. In Riverside County, the labor force participation rate actually increased a full percentage point.

Southern California's labor force participation remains about 0.5 percent above the national level and is higher in the coastal counties of Los Angeles, Orange, and Ventura.

COLLEGE EDUCATION RATES

College education rates continued their longstanding rise.

Percentage of Population 25 Years and Over with at Least a Bachelor's Degree



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table C15002.

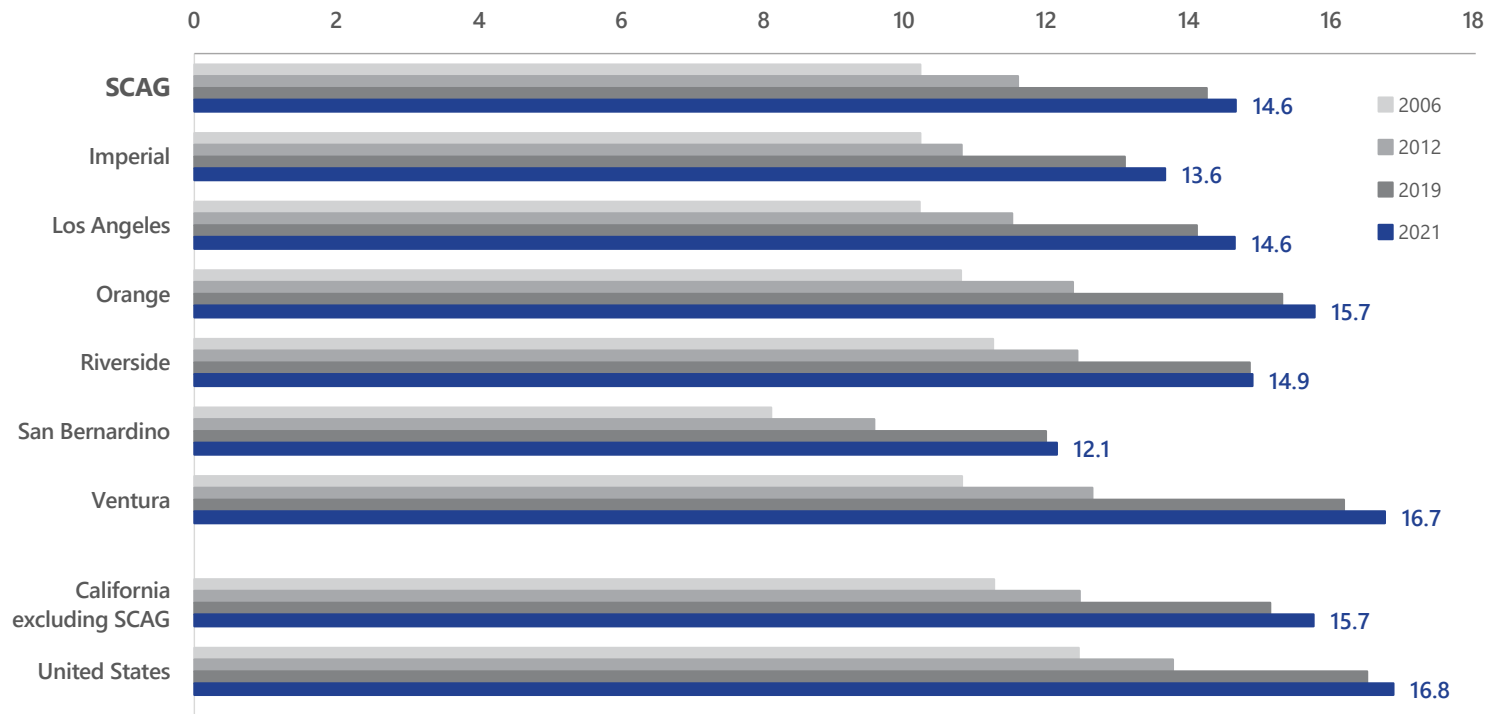
Education is a key component of regional economic development. This chart shows that college education rates continued to increase in most areas from 2019 to 2021. In the SCAG Region, overall, 33.6 percent of SCAG residents over age 25 have at least a bachelor's degree, up from 26.8 percent in 2006. This mirrors a similar increase nationwide, though the region's college education rates lag the nation by 1.4 percentage points and lag the rest of the state by 5 percentage points.

Within the SCAG Region, the share of the college-educated population in Orange County exceeds the U.S. rate of college education by over 8 percentage points.

POPULATION AGE 65 AND OVER

Despite higher mortality rates from COVID, the share of the population over age 65 keeps rising.

Percentage of Total Population Age 65 and Over



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table B01001.

While mortality from COVID was higher among older adults, adults 65 and older continue to make up an increasing share of the population in all areas. This is not surprising because COVID was also associated with lower fertility rates and its impact on the age distribution may be minimal.

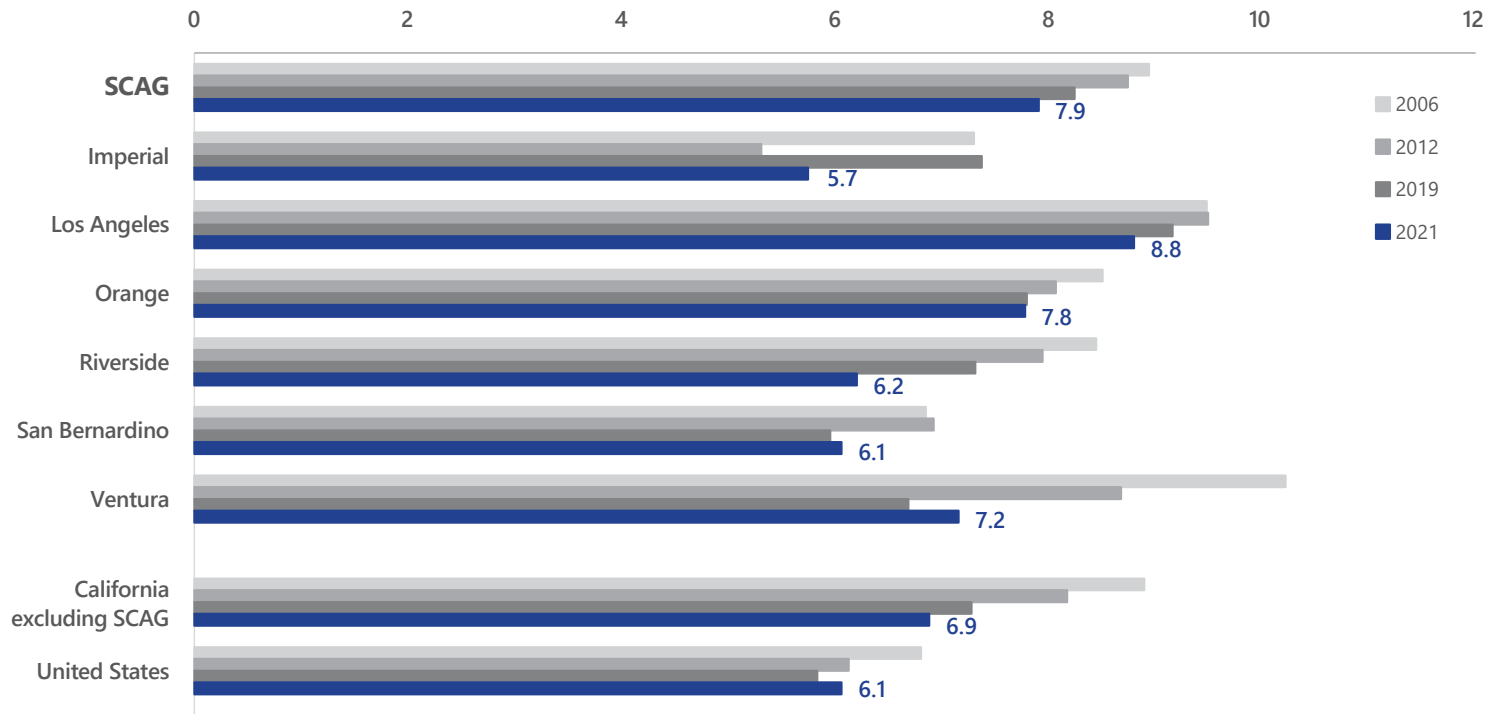
The share of the population age 65 and over in the SCAG Region was 14.6 percent in 2021, over 2 percentage points lower than in the U.S. as a whole and 1 percentage point below the rest of California.

The distribution of older adults in the region varies widely across the SCAG counties: In 2021, San Bernardino County had the “youngest” population with 12.1 percent of the population 65 and older. Ventura County is at the other extreme and closer to the U.S. with 16.7 percent of the population age 65 and older.

SELF EMPLOYMENT

The rate of self-employment dropped across California but increased nationally.

Percentage of Employed Population 16 Years and Over that is Self-Employed



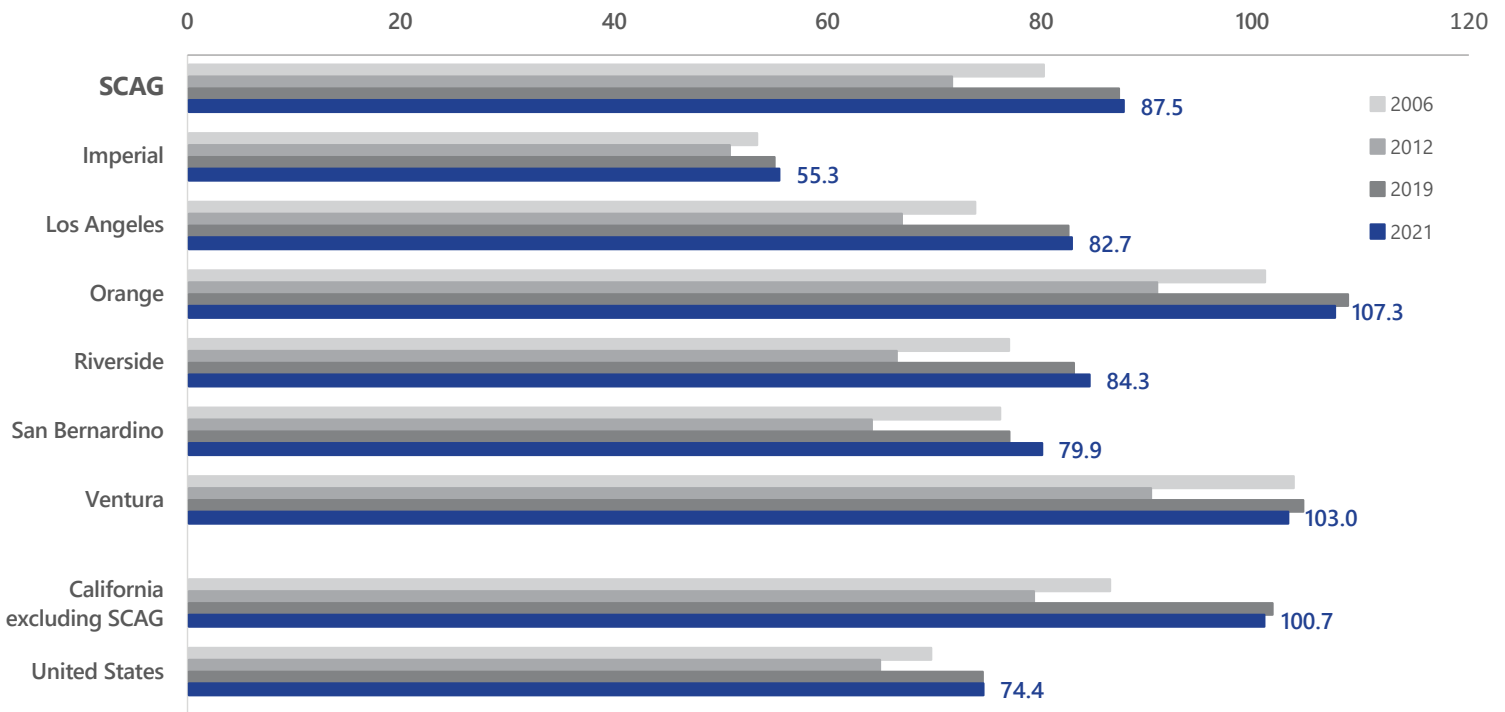
Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table B24080.

Historically, self-employment has been a larger share of employment in the SCAG Region than the rest of the U.S. Between 2019 and 2021, self-employment shares dropped precipitously in Los Angeles and Riverside Counties, resulting in a decrease in self-employment share region-wide from 8.2 percent to 7.9 percent. The rest of California also reported a decrease in self-employment, which contrasts with the increase in self-employment nationally.

MEDIAN HOUSEHOLD INCOME

Real median incomes increased by less than 1 percent in most areas, suggesting that on the whole wage gains merely kept pace with inflation.

Median Household Income in Thousands of 2022 U.S. Dollars



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP03. Dollar values inflated to 2022 dollars using the July 2022 CPI (All Urban Consumers), Federal Reserve Economic Data, <https://fred.stlouisfed.org>. For SCAG and the rest of

Adjusted for inflation, real median household incomes increased very slightly between 2019 and 2021 in most Southern California counties, region-wide, and nationally between 2019 and 2021. This suggests that average wage gains were barely able to match the pace of inflation.

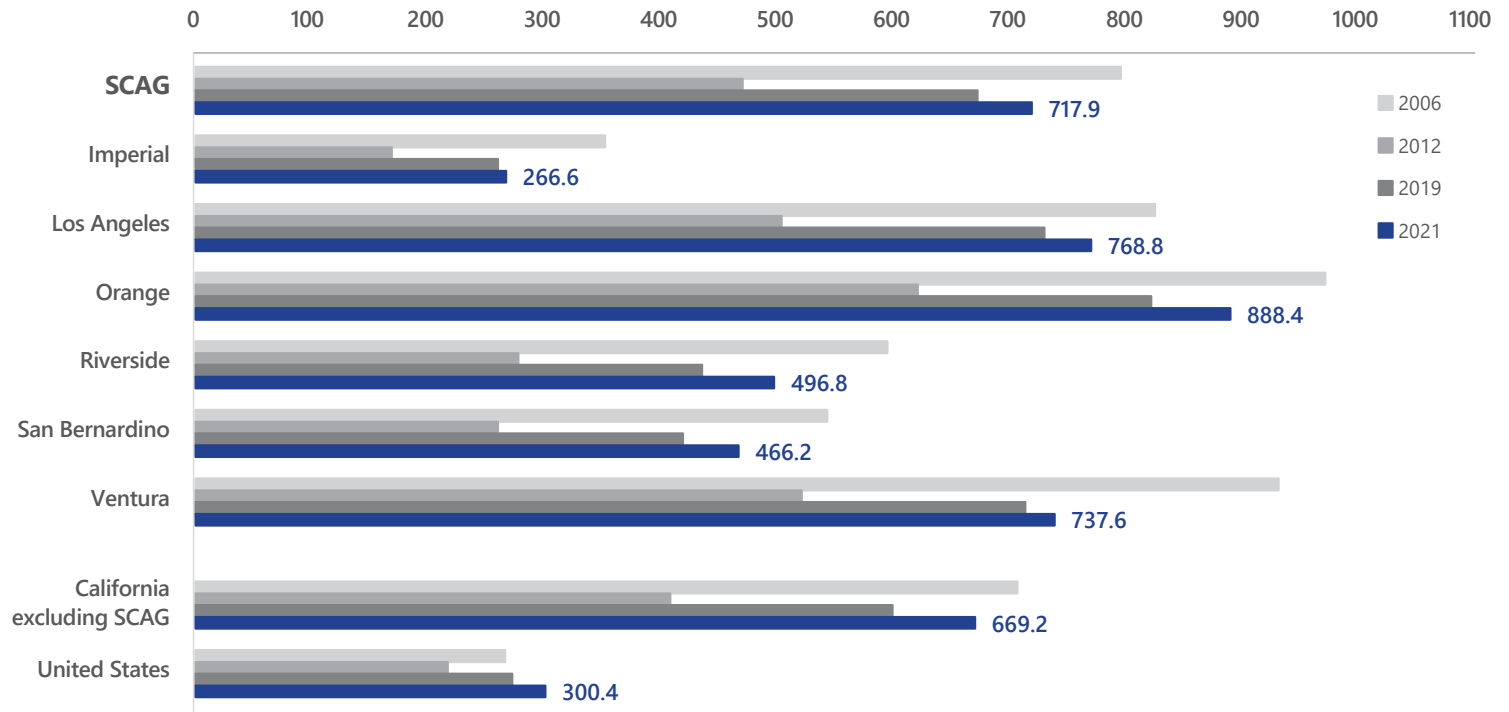
The region's real median household income of \$87,547 is well above its Great Recession low point of \$71,450. However, it has only increased 9.3 percent since 2006 in real dollars (from \$80,069). This increase in income in the SCAG Region is greater than the 7.0 percent increase nationwide over the last sixteen years, but lower than the 16.8 percent increase in the rest of California.

Real median household income in Orange and Ventura Counties dropped slightly from 2019 to 2021, with income in Ventura County now below 2006 levels.

MEDIAN HOME VALUES

Inflation-adjusted median home values rise in the SCAG region, but less than elsewhere in the country.

Median Home Value in Thousands of 2022 U.S. Dollars



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP03. Dollar values inflated to 2022 dollars using the July 2022 CPI (All Urban Consumers), Federal Reserve Economic Data, <https://fred.stlouisfed.org>. For SCAG and the rest of California, we report the household-weighted average median home value.

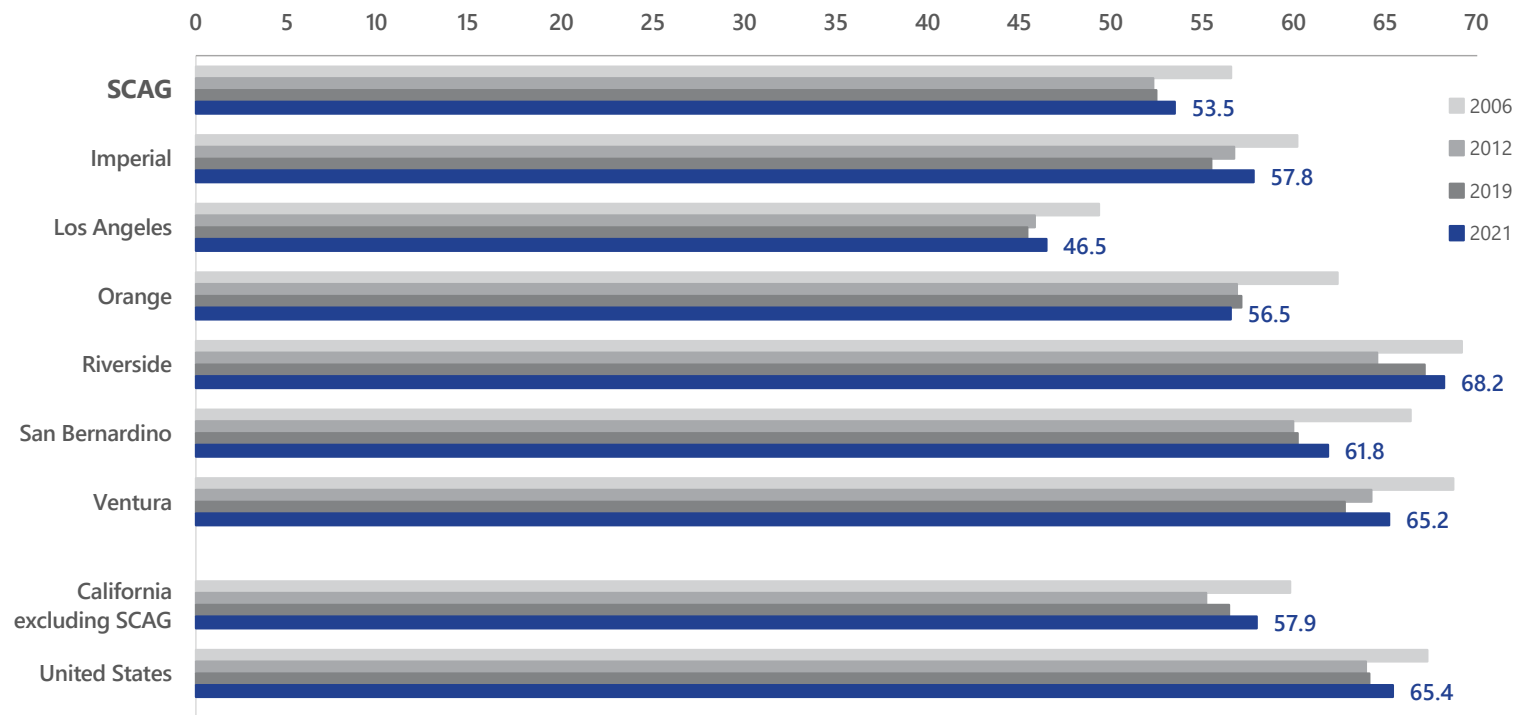
Several forces influenced real home values in the SCAG Region between 2019 and 2021. These factors include supply shortages, eviction protections, aging Millennials, lockdowns, and interest rate fluctuation, which may have counter-balancing effects. The net effect has been an increase in the inflation-adjusted median home value in the SCAG Region from \$671,479 in 2019 to \$717,905. This is a 6.9 increase, which is well below the 10.4 percent increase seen nationally. This has the effect of slightly reducing the price gap between Southern California and other regions.

Changes were uneven within the SCAG region from 2019-2021, ranging from a 14.2 percent increase in real median home prices in Riverside County to a 2.7 percent increase in Imperial County.

HOME OWNERSHIP

Home ownership rises modestly, nearly everywhere.

Percentage of Housing Units Occupied by Owners



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table B25014.

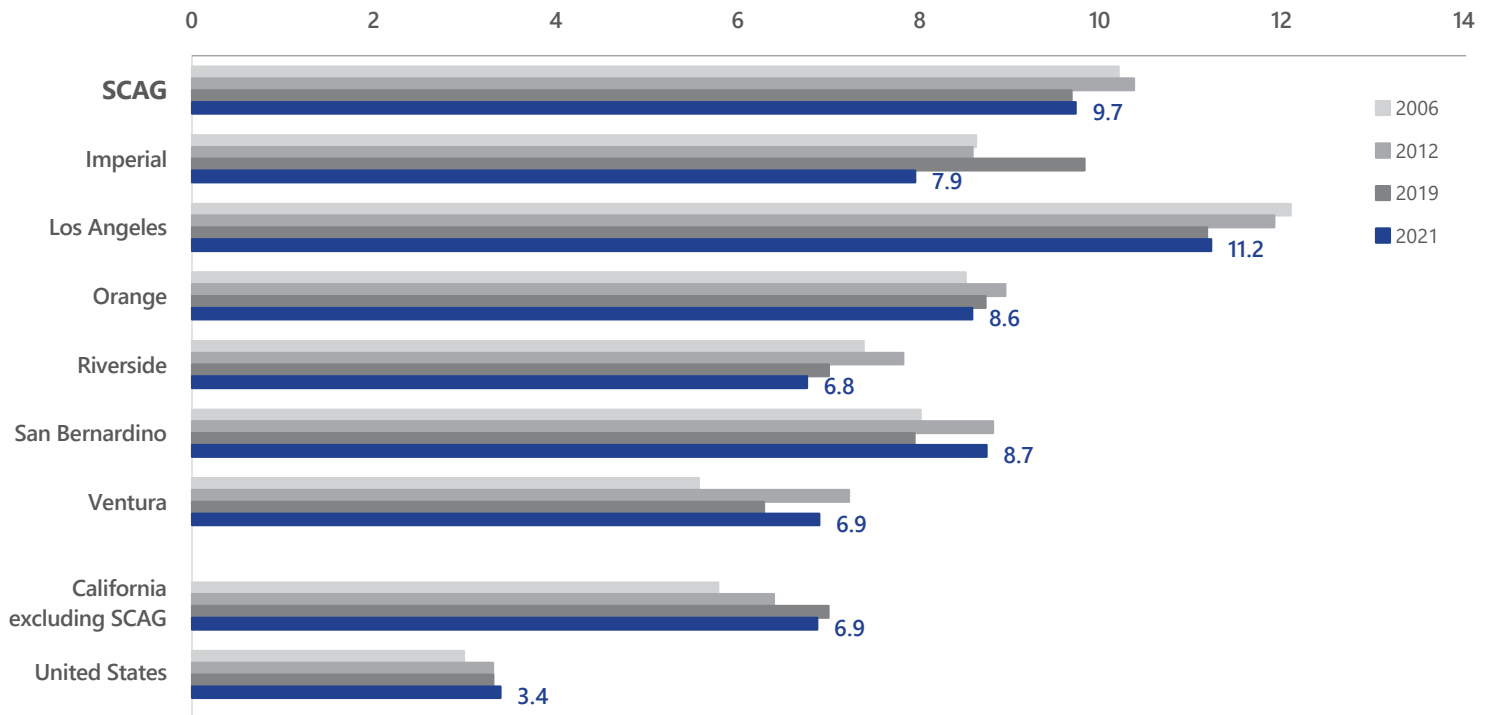
Home ownership increased modestly in most places but is still below 2006 levels. SCAG Region home ownership increased from 52.5 percent to 53.5 percent between 2019 and 2021, increasing most in Ventura County (2.4 percent). However, the home ownership rate decreased slightly in Orange County (0.58 percent).

Historically Southern California's home ownership rates have been lower than the rest of the state and nation. Home ownership nationwide also rose slightly to 65.4 percent.

HOUSEHOLD OVERCROWDING – TOTAL

Southern California’s household overcrowding stable; continues to exceed state and nation.

Percentage of Owner-Occupied Housing Units with Overcrowding (1+ Persons per Room)



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table B25014. Overcrowding defined as housing units with 1 or more persons per room, U.S. Dept. of Housing and Urban Development, 2007.

Housing overcrowding has been an increasing focus of state and regional housing planning efforts. Overcrowding in the SCAG Region remained stable between 2019 and 2021 at 9.7 percent, after dropping from a high of 10.4 percent in 2012. This compares to a 0.1 percent decrease in the rest of California and a 0.1 percent increase nationwide. San Bernardino County’s overcrowding rate increased the most, from 7.9 percent to 8.7 percent. SCAG Region housing overcrowding continues to exceed the rest of the state and nation by a wide margin.

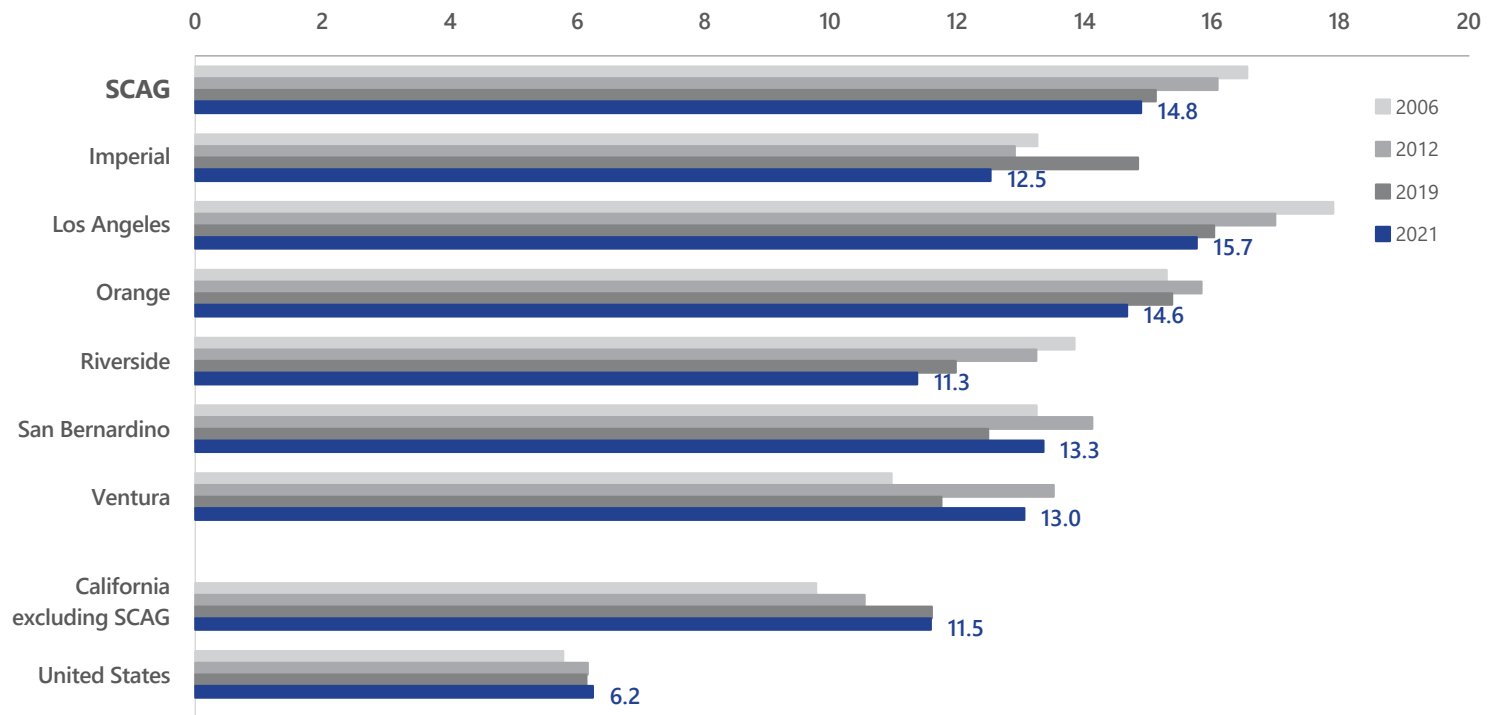
We define overcrowding as housing units with 1 or more persons per room.*

* Blake, K. S., Kellerson, R. L., & Simic, A. (2007). Measuring Overcrowding in Housing, U.S. Dept. of Housing and Urban Development
https://www.huduser.gov/publications/pdf/measuring_overcrowding_in_hsg.pdf

HOUSEHOLD OVERCROWDING – RENTER

Renter overcrowding dropped modestly in the region.

Percentage of Renter-Occupied Housing Units with Overcrowding (1+ Persons per Room)



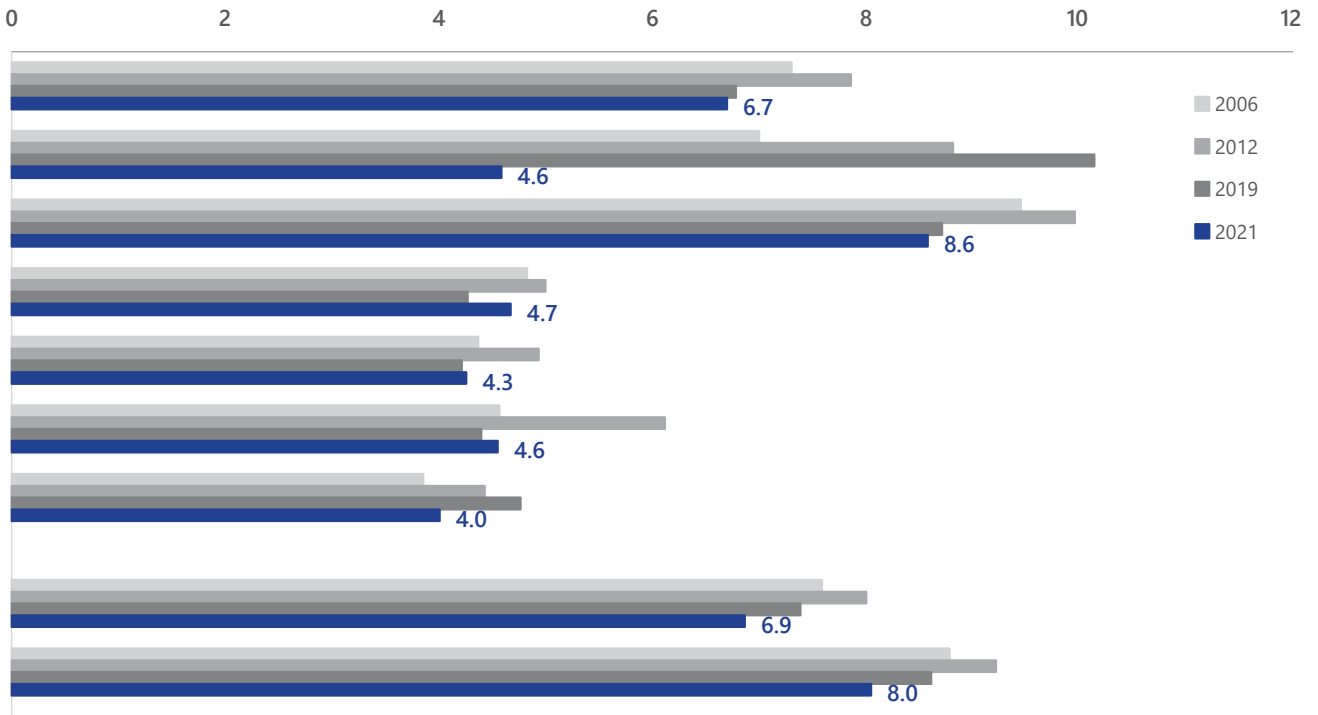
Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table B25014. Overcrowding defined as housing units with 1 or more persons per room, U.S. Dept. of Housing and Urban Development, 2007.

Rental unit overcrowding is a more acute indicator of housing insecurity and it dropped by 0.3 percent in the region between 2019 and 2021. This contrasts with a 0.1 percent increase in rental overcrowding nationwide from 2019-2021.

HOUSEHOLDS WITH NO VEHICLES

The share of households with no vehicles continues a modest decline and remains a rarity in Southern California.

Percentage of Households with No Vehicles



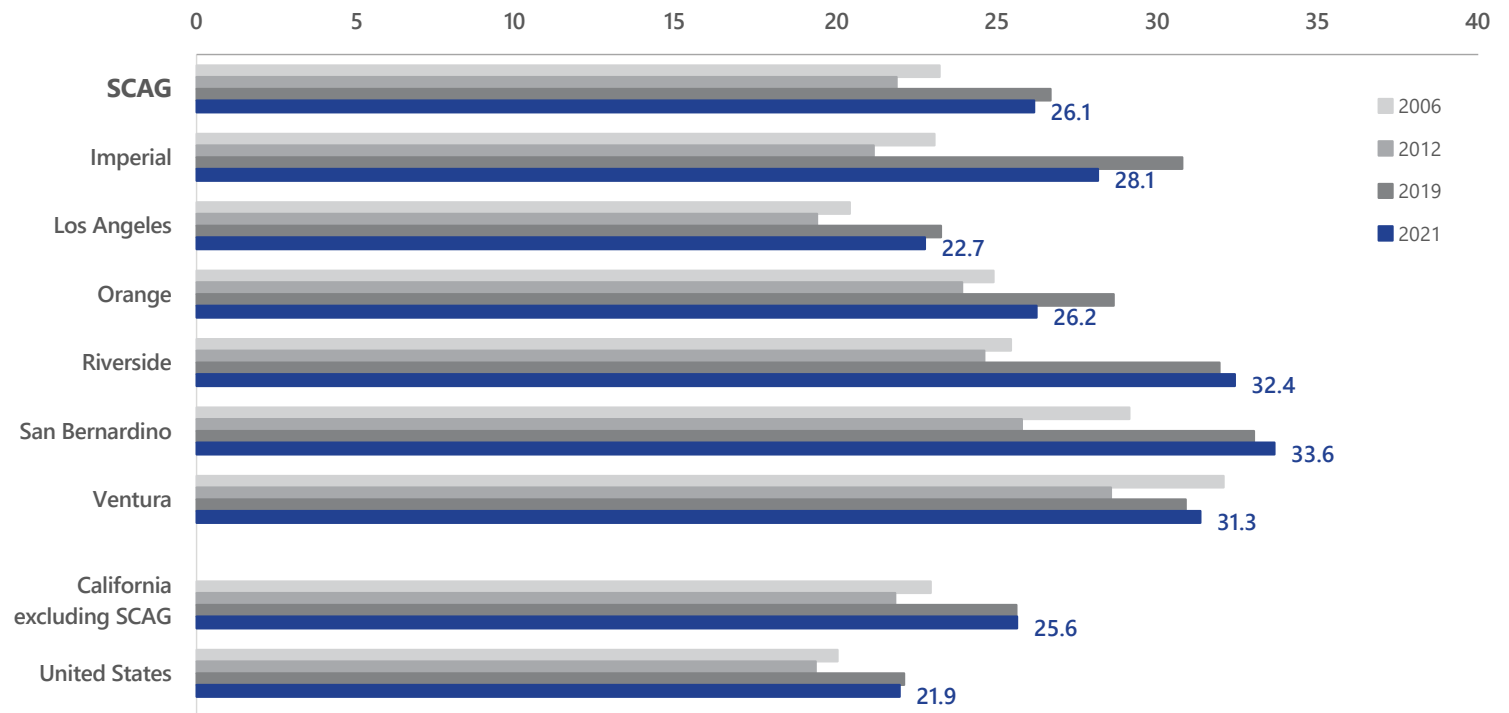
Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP04.

In most places, the share of households without access to a vehicle continued its modest decline from the high of 2012. In Imperial County, the share of households without a vehicle dropped from 10.1 to 4.6 percent from 2019 to 2021, while in Orange County, the share of households without a vehicle increased from 4.3 to 4.7 percent. Overall, 6.7 percent of SCAG Region households are without a vehicle, compared to 8.0 percent nationwide.

HOUSEHOLDS WITH THREE OR MORE VEHICLES

The trend toward owning three or more vehicles has plateaued, except in the Inland Empire.

Percentage of Households with 3 or More Vehicles



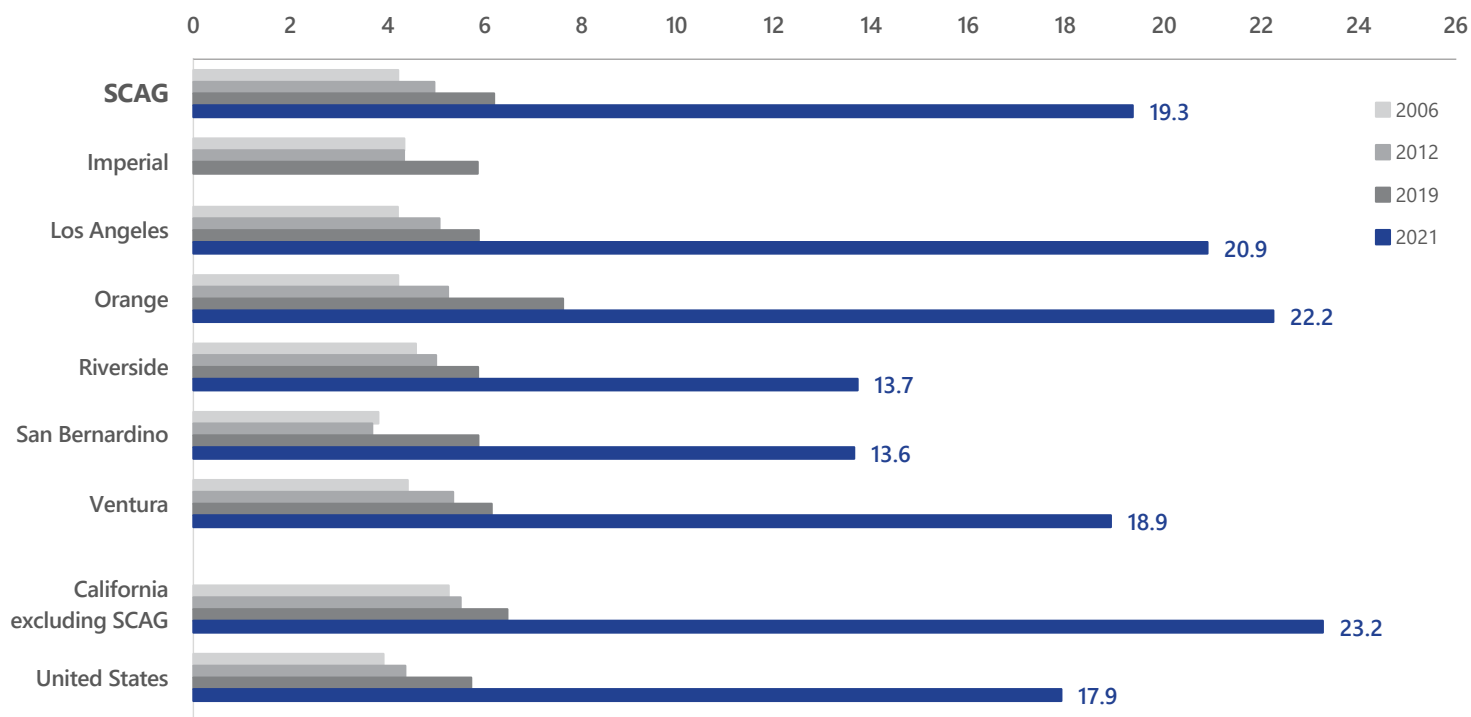
Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP04. Data for Imperial County is from the 5-year American Community Survey sample.

The trend of owning three or more vehicles, which had been rising up to 2019, reversed modestly in most areas. However, the share of households in Riverside, San Bernardino, and Ventura Counties with three or more vehicles increased by nearly 1 percentage point from 2019 to 2021. High automobile ownership households dropped by over 2 percentage points in Orange County.

WORK FROM HOME

The increase in working from home was dramatic and universal – increasing more than threefold regionally and nationally, with the largest increase in Los Angeles County.

Percentage of Workers Age 16 and Over Who Work from Home



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP04. Data for this variable are incomplete for Imperial County. Data for Imperial County are from the 5-year sample, if available.

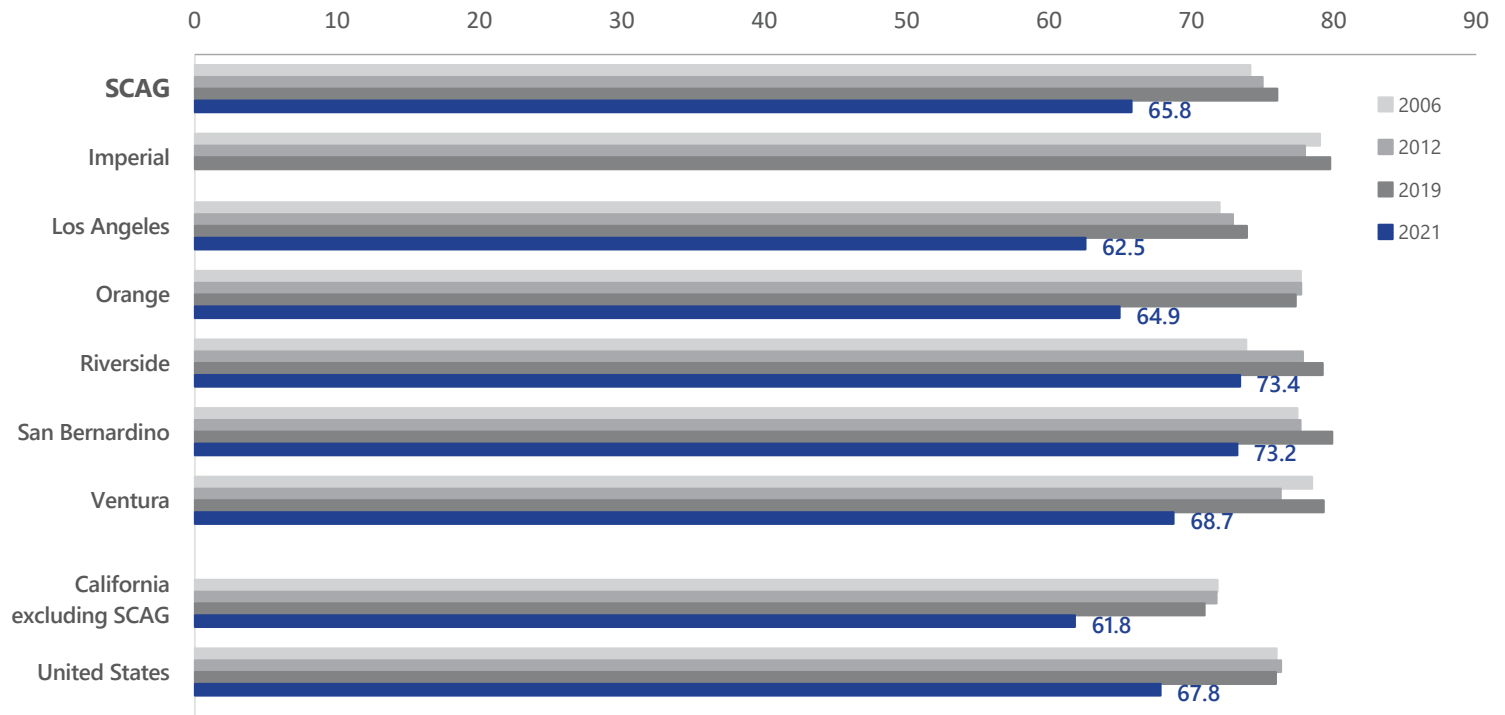
The increase in workers who report their commute mode as “working from home” was dramatic and universal. The work-from-home share, which grew in the SCAG Region from 4 percent in 2006 to 6 percent in 2019, grew to 19 percent by 2021. The SCAG Region’s work-at-home share is 1.5 percentage points higher than the U.S., but 3.9 percentage points lower than the rest of California.

Work-from-home shares vary widely across the region, with rates of 13.6 percent to 13.7 percent in Riverside and San Bernardino Counties, and rates of 20.9 percent and 22.2 percent in Los Angeles and Orange Counties, respectively. The ACS conducts sampling throughout each calendar year, so the impact of specific portions of the pandemic is not clearly known from these data.

SINGLE-OCCUPANT VEHICLE COMMUTING

The share of workers who drive alone to work dropped substantially in all places.

Percentage of Workers Age 16 and Over Who Drive Alone to Work



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP04. Data for this variable are incomplete for Imperial County. Data for Imperial County are from the 5-year sample, if available.

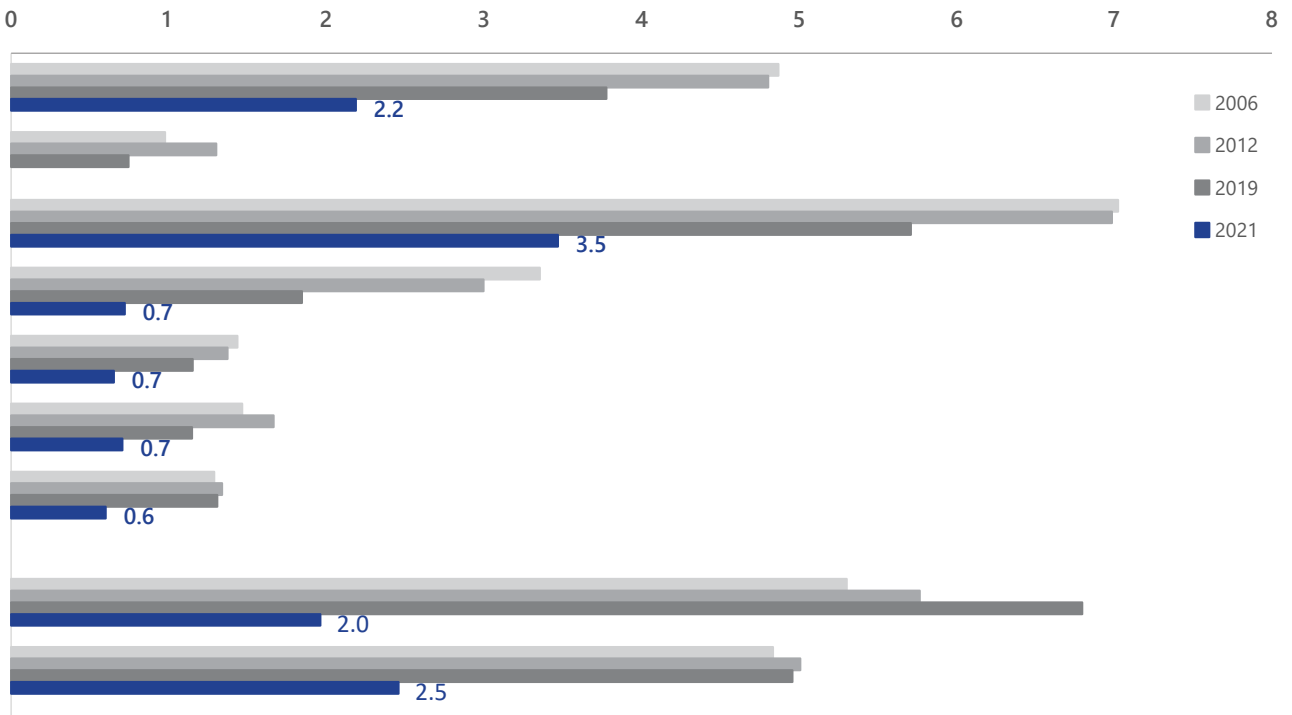
The share of workers who drive alone dropped substantially in all places, being replaced by home-based work. In the SCAG Region, this share dropped from 76 percent in 2019 to 65.8 percent in 2021. This follows a gradual increase in single-occupant commuting observed in the last decade.

The share of workers driving alone to work in the SCAG Region is higher than the rest of California, where transit commuting shares had been higher historically. 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

Transit use for commuting dropped by about half; Los Angeles is the only SCAG county where transit commute share remains above 1 percent.

Percentage of Workers Age 16 and Over Who Take Public Transit to Work



Notes: Chart reports data from the American Community Survey 1-year samples for 2006, 2012, 2019, and 2021, Table DP04. Data for this variable are incomplete for Imperial County. Data for Imperial County are from the 5-year sample, if available.

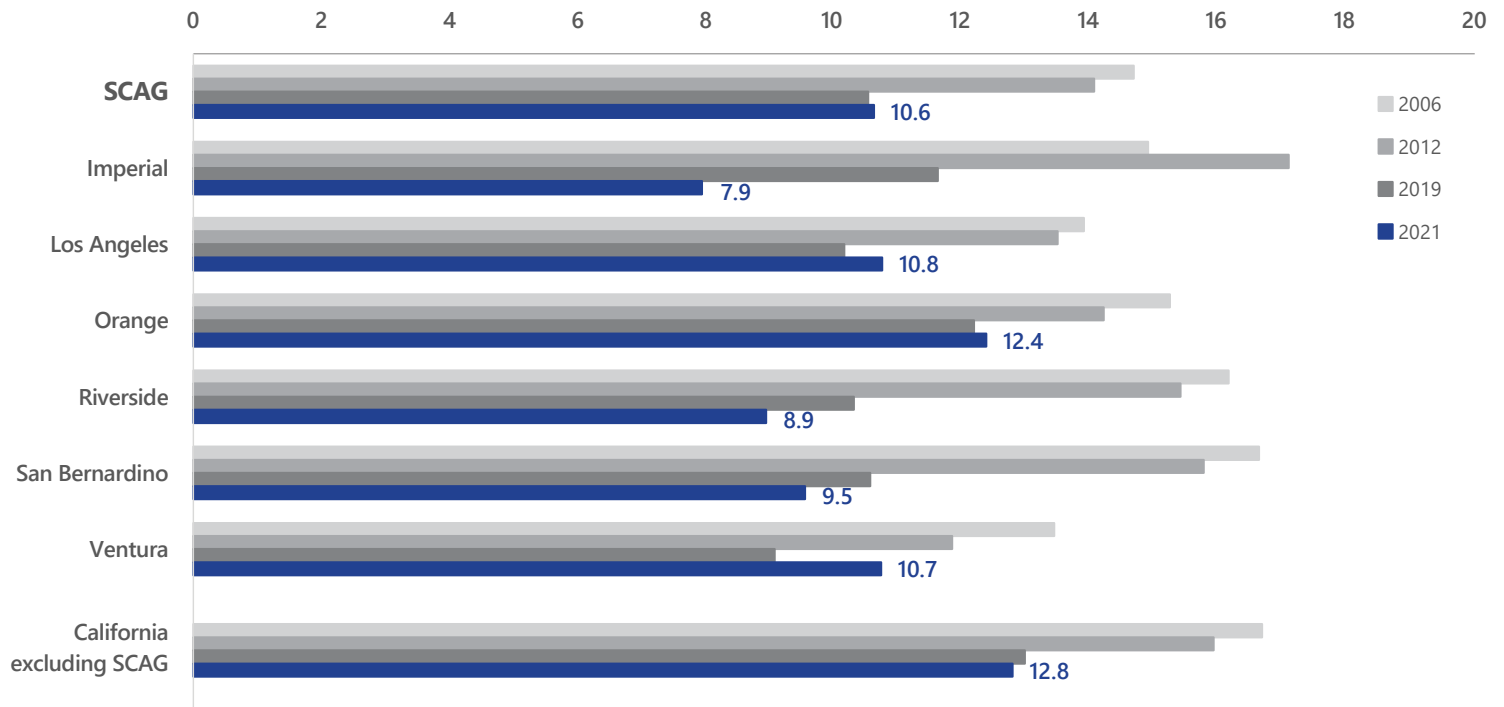
The share of workers using public transportation to get to work dropped by nearly half between 2019 and 2021. In the SCAG Region, this share dropped from 3.8 percent in 2019 to 2.2 percent in 2021. This rapid drop-off follows a modest decline between 2012-2019 in most places, with the exception of the areas of California outside the SCAG Region.

Los Angeles County's transit mode share of 3.5 percent is now half of its peak of 7.0 percent which was observed in 2012. The U.S. transit commute share also declined from 5.0 percent to 2.5 percent. Outside Los Angeles County, no SCAG county had a transit mode share exceeding 1 percent.

GEOGRAPHIC MOBILITY – OVERALL

Geographic mobility slightly up in the region's coastal counties and slightly down inland.

Percentage of Households that Moved in the Past Year



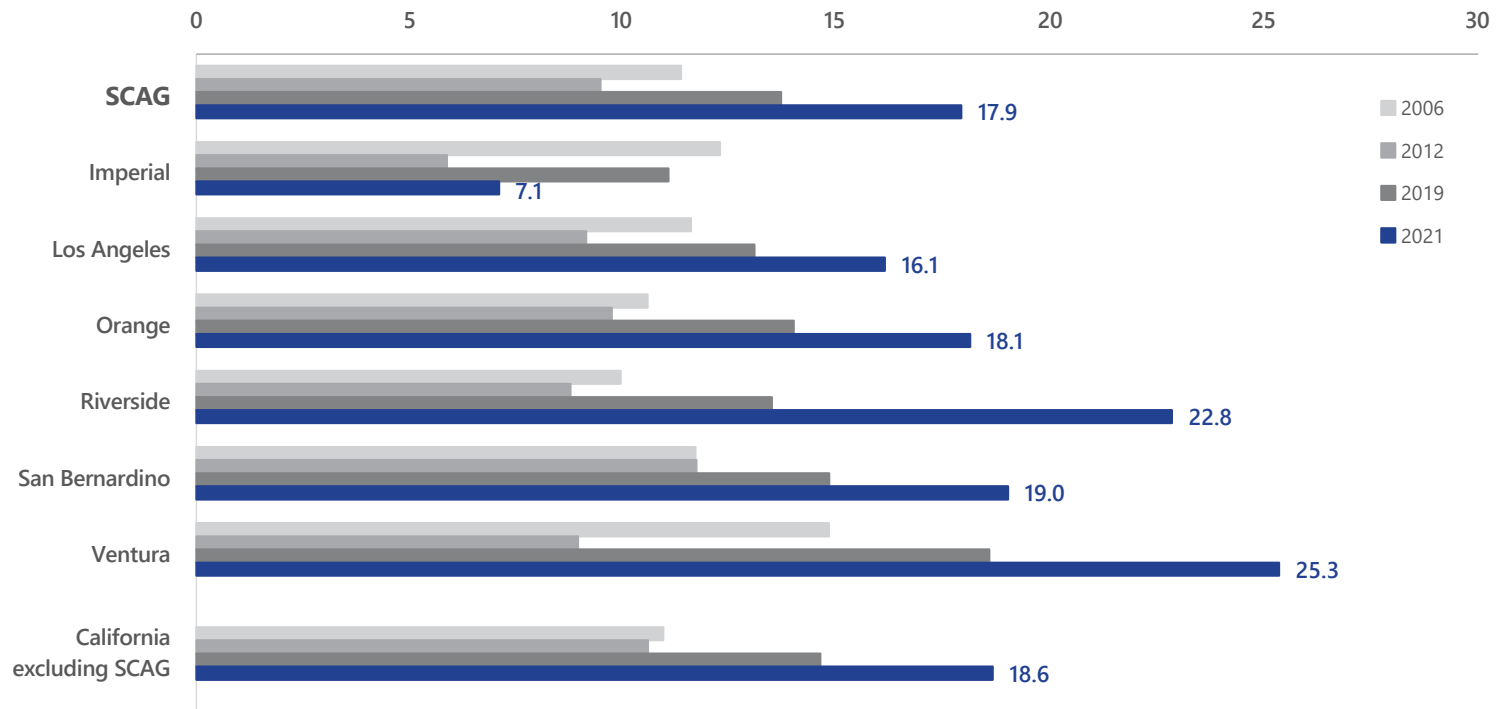
Notes: Chart reports data from the American Community Survey 1-year samples for 2012, 2019, and 2021, Table B07403. Data for 2006 is from the 2006-2010 5-year American Community Survey sample.

Residential moves have been dropping fairly consistently over the last two decades. In 2006, 14.7 percent of Southern Californians lived in a different home than in the prior year; in 2021 this was down to 10.6 percent. Mobility in the coastal counties of Los Angeles, Orange, and Ventura reversed their previous declines and increased from 2019 to 2021. However, mobility in the inland counties of Imperial, Riverside, and San Bernardino continued to decrease between 2019 and 2021. Moves in the rest of California were higher than the SCAG Region as a whole.

GEOGRAPHIC MOBILITY – INTERSTATE

A far higher share of households who moved are now choosing an out-of-state destination.

Percentage of Households that Moved Out of State



Notes: Chart reports data from the American Community Survey 1-year samples for 2012, 2019, and 2021, Table B07403. Data for 2006 is from the 2006-2010 5-year American Community Survey sample.

While the share of people moving changed little between 2019 and 2021, where they moved changed dramatically. This series shows the percent of movers who crossed state lines. The share of Southern California movers who left the state increased from 13.7 percent in 2019 to 17.9 percent in 2021. The rise in the share of movers who left California entirely was substantially higher in Riverside and Ventura counties than elsewhere in the region.





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