



CONNECT SOCIAL 2050

PRELIMINARY REGIONAL GROWTH PROJECTIONS

Kevin Kane, PhD

Program Manager, Demographics & Growth Vision

April 2026

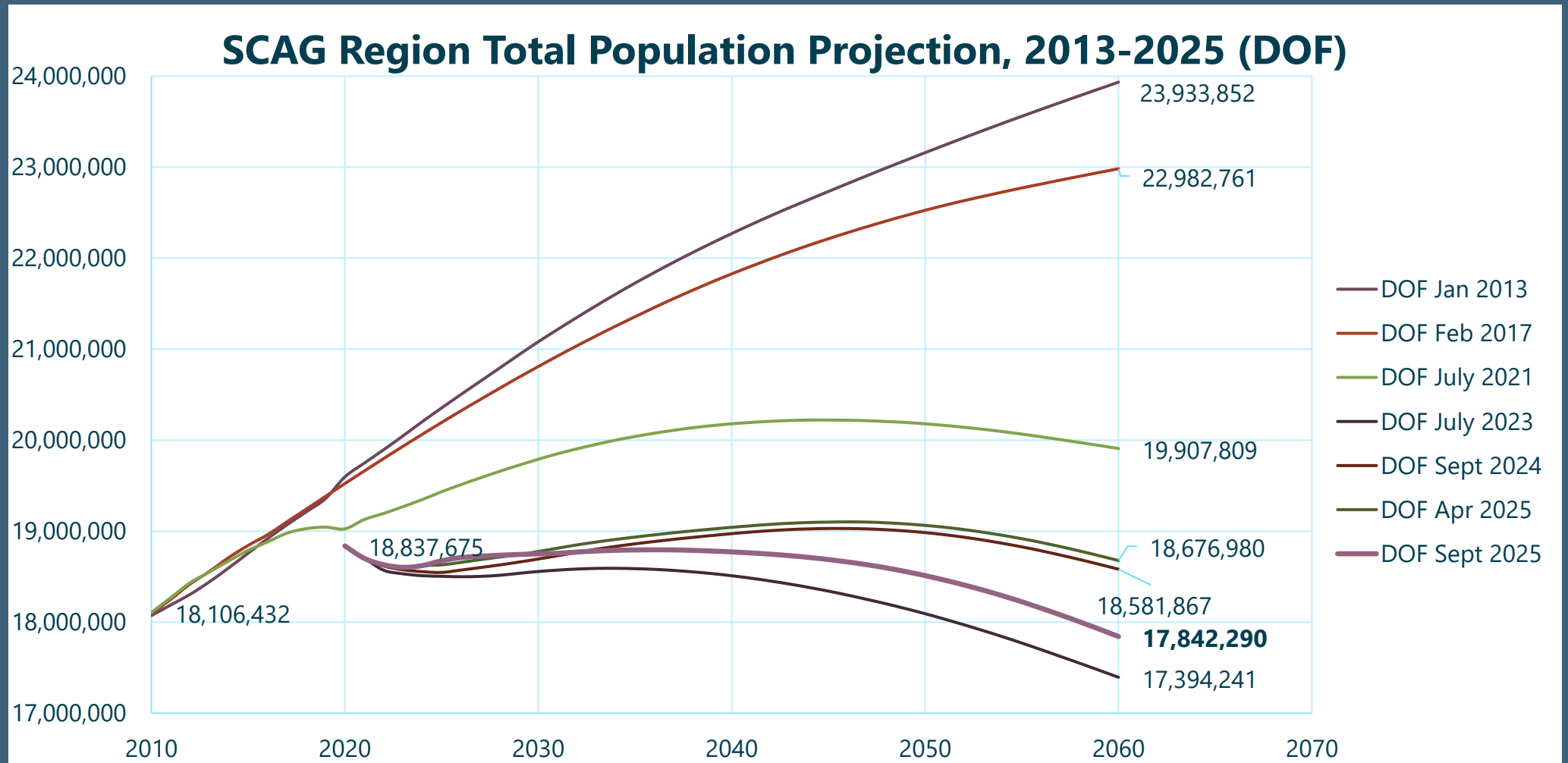


Envisioning 2050

- 7 main forecast assumptions:
 - Births and deaths
 - Migration and immigration
 - Household formation
 - Job growth
 - Labor force participation
- Panel of Experts
- Technical Modeling
- Basis for Subsequent Policy & Strategy Development

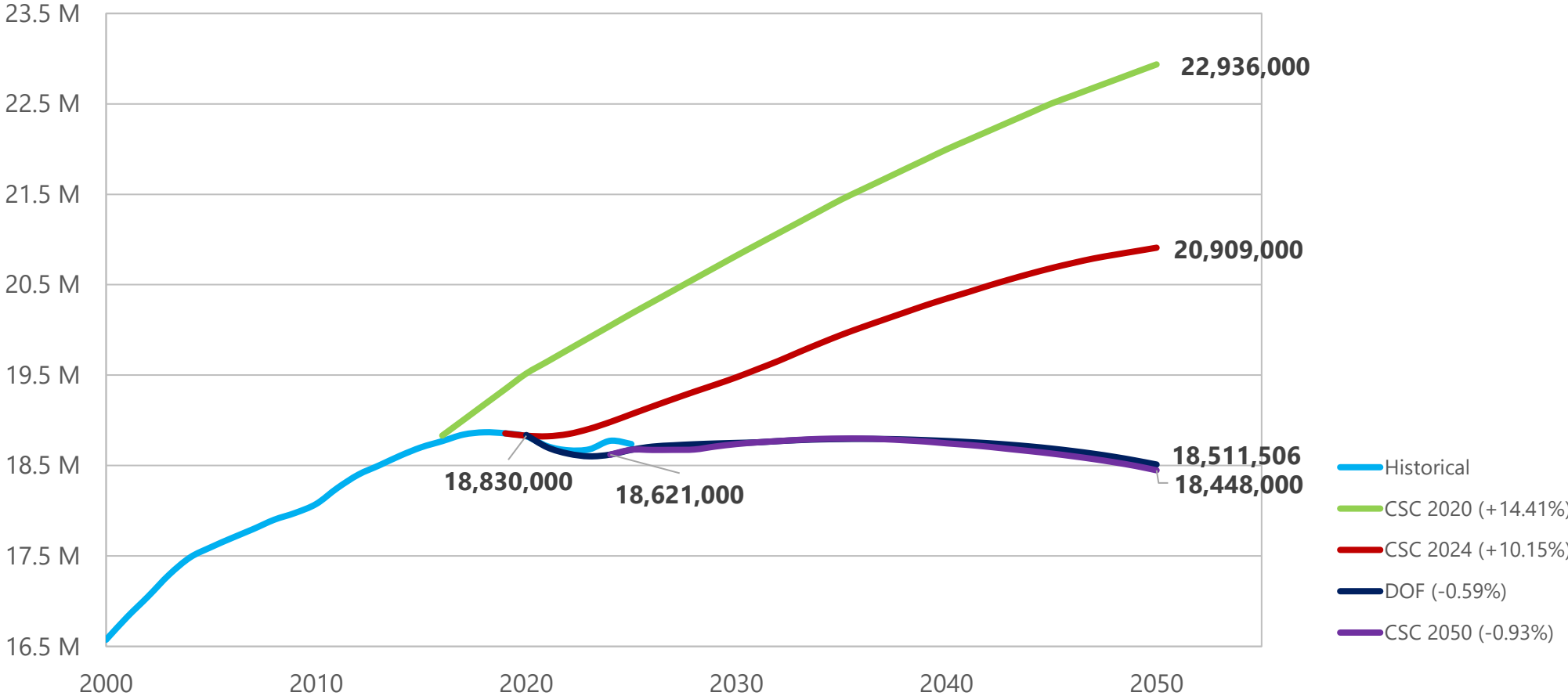


Expectation for population growth has consistently slowed



Source: State of California, Department of Finance, P-3 Projections, collected by SCAG from 2013 through Vintage 2024 (2025.9.30)

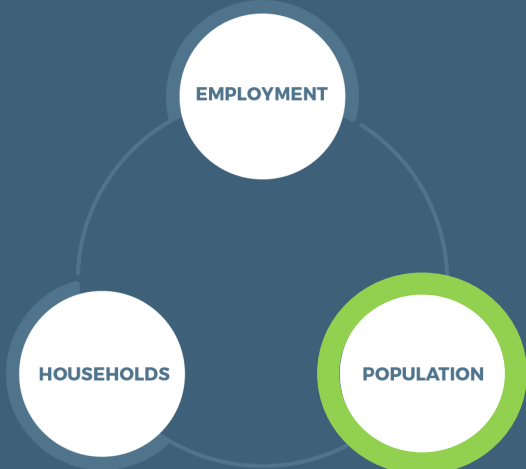
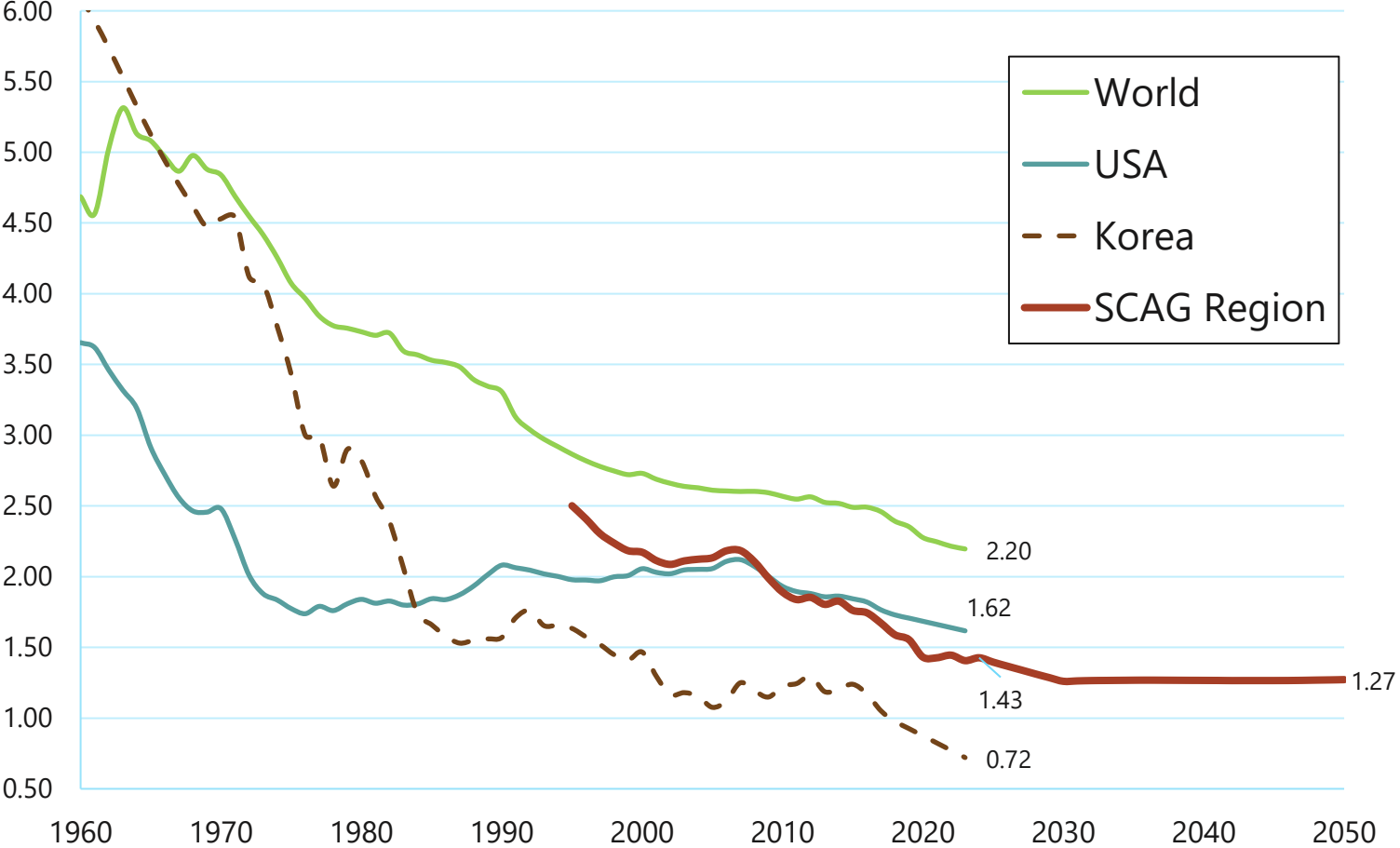
Preliminary Connect SoCal 2050 Population Projection



Notes: Percentage increases reflect 2024-2050. Historical data is CA DOF E-2 estimates, reflecting July 1. 2020 RTP/SCS plan horizon was 2016-2045, though preliminary projections were conducted through 2050. 2024 RTP/SCS plan horizon was 2019-2050.

Global Growth and Planning Context

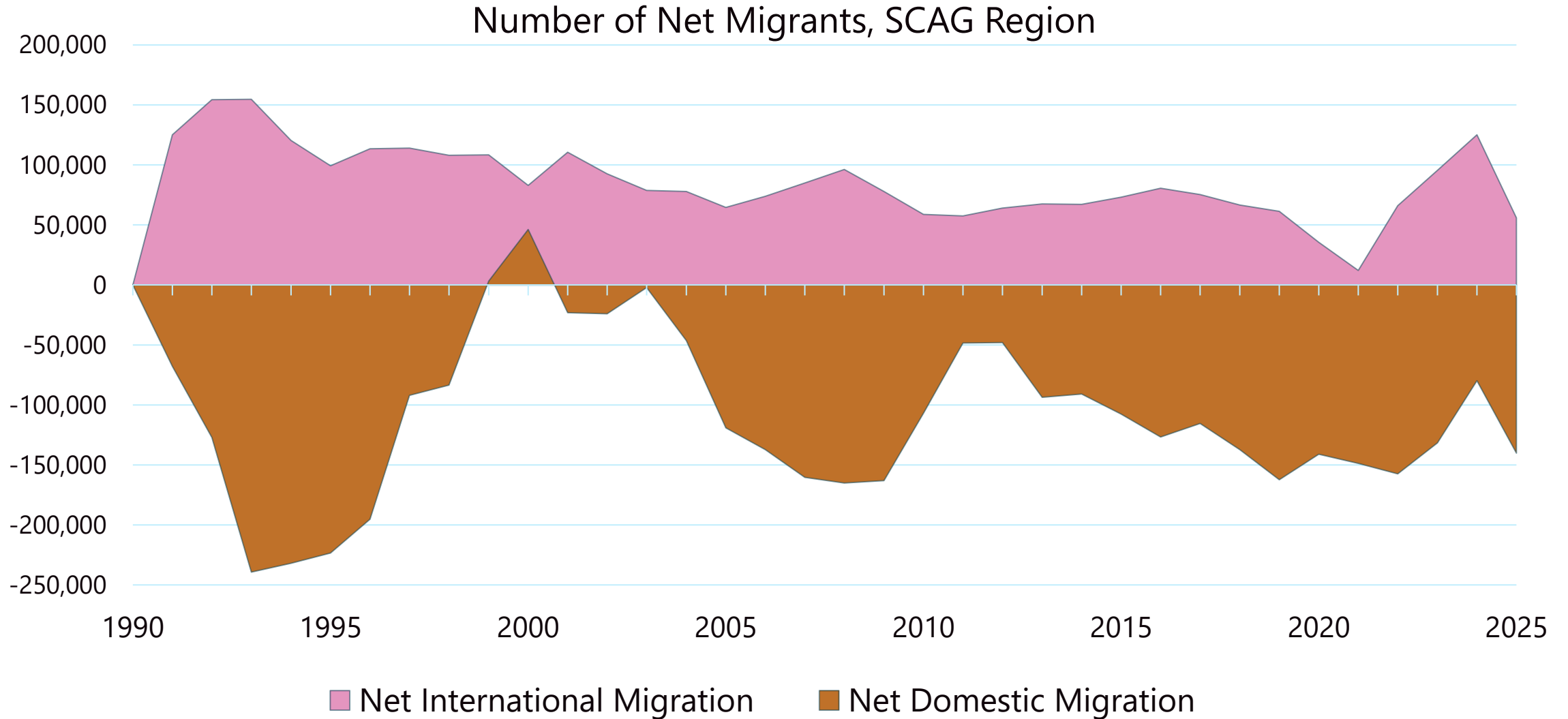
Comparison of Total Fertility Rates, 1960 – 2050 (Projected)



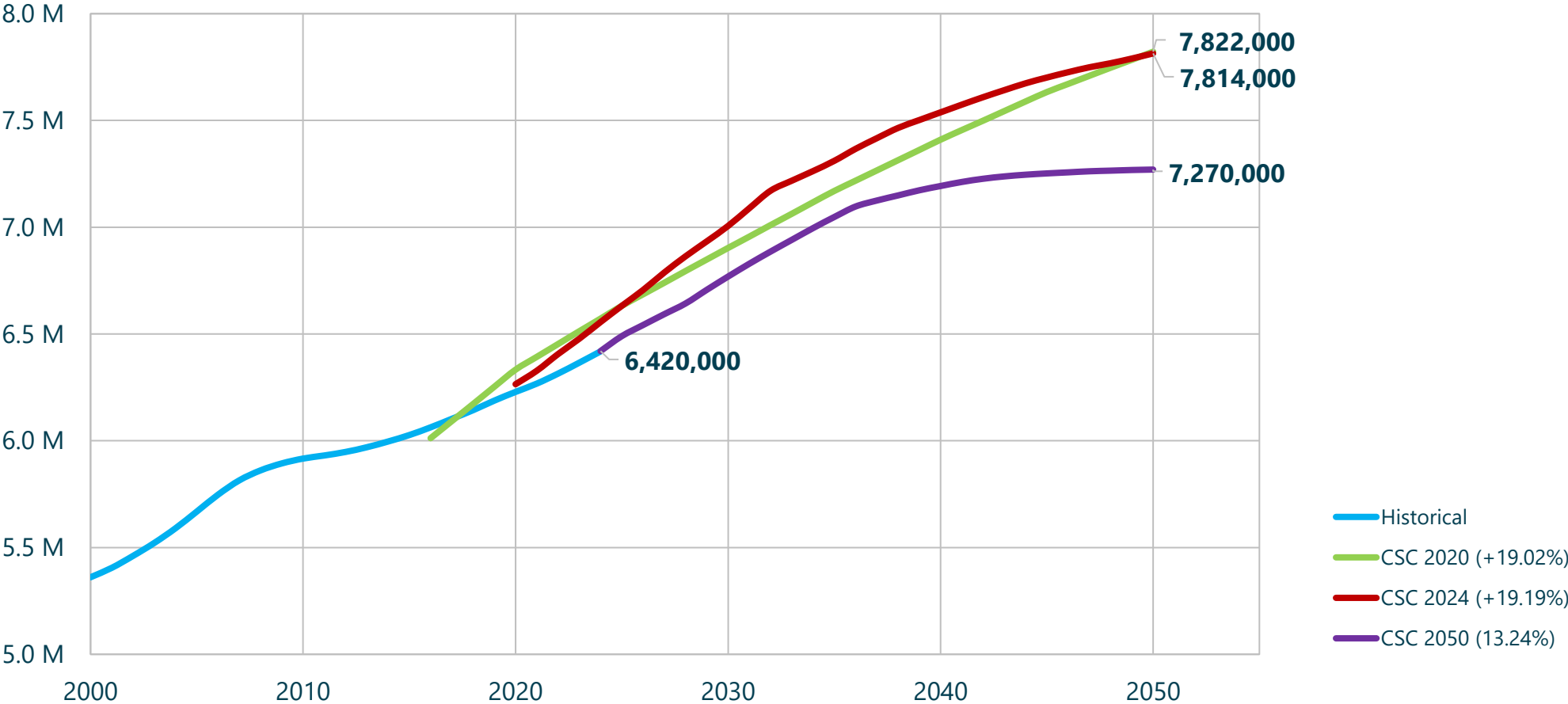
Slower growth is becoming universal.
 A new future to adapt to for **Regional Planning... and Global Economies.**

Fertility data sources: World Bank (Global and Korea), Population Reference Bureau (USA), SCAG past (RAND state statistics), SCAG projection (Connect SOCal 2050 Preliminary Projection).

SCAG Region Migration – Long Term



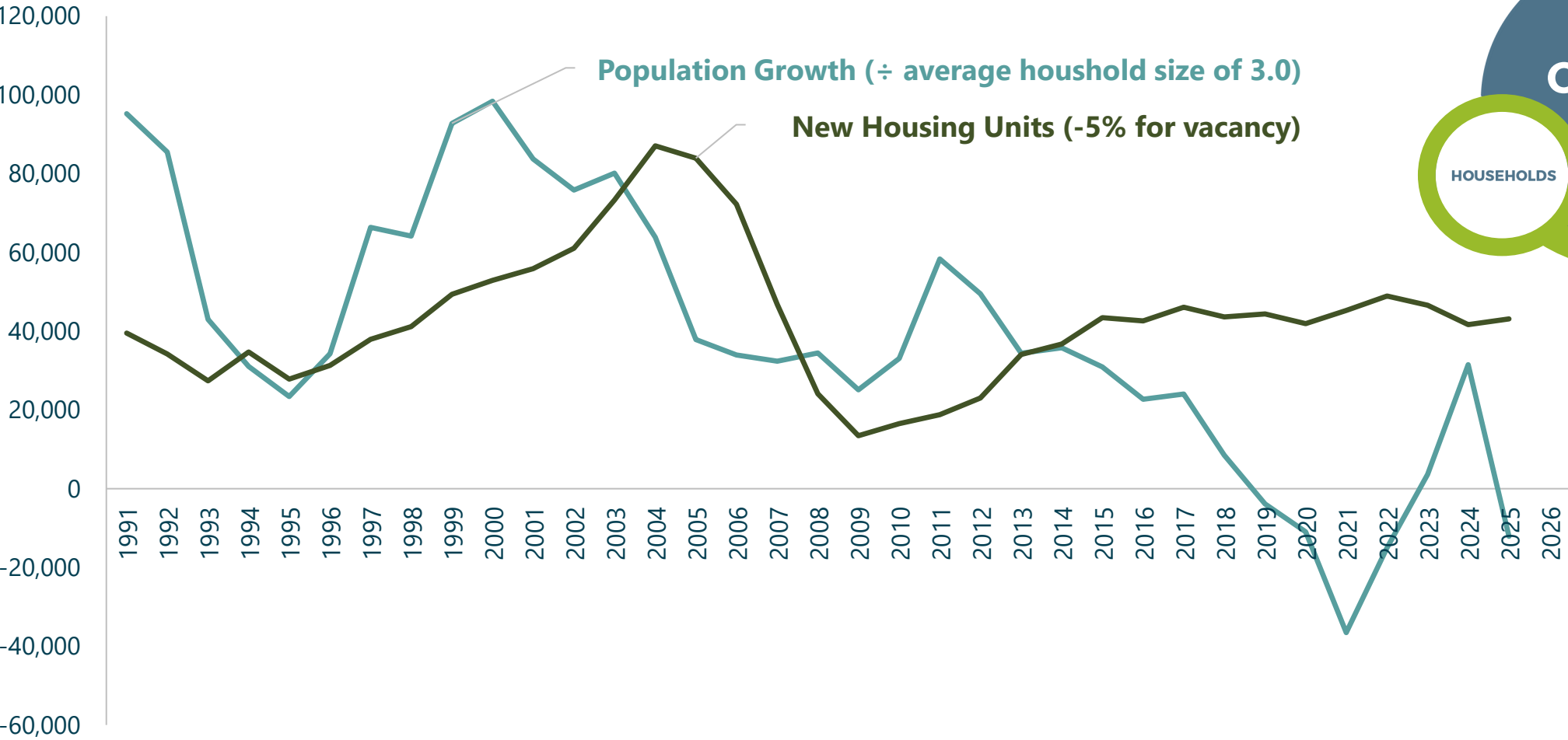
Preliminary Connect SoCal 2050 Household Projection



Sources: Percentage increases reflect 2024-2050. Historical series averages CA DOF E5 series to approximate July 1 totals. Connect SoCal 2020 (CSC 2020) plan horizon was 2016-2045, though preliminary projections were conducted through 2050. Connect SoCal 2024 (CSC 2024) plan horizon was 2019-2050. Plan horizon of under-development Connect SoCal 2050 (CSC 2050) is 2024 – 2050.
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS

Comparison of Population vs. Housing Growth

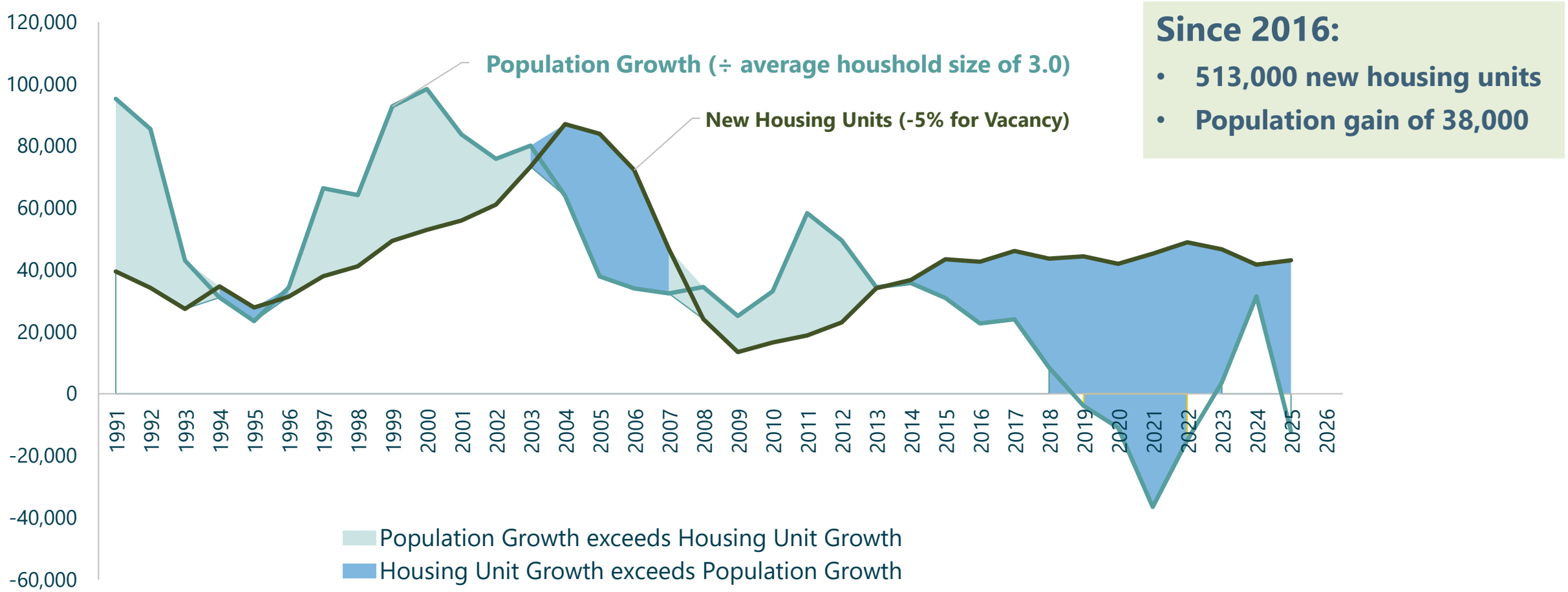
SCAG Region, 1991-2025



Source: CA DOF DRU E-2 July 2023 population estimates and U.S. Census Building Permit Survey, "New Residential Units from Building Permits Issued"

Comparison of Population vs. Housing Growth

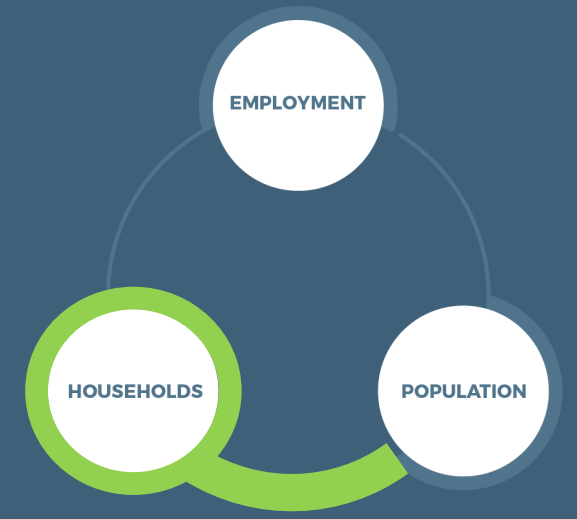
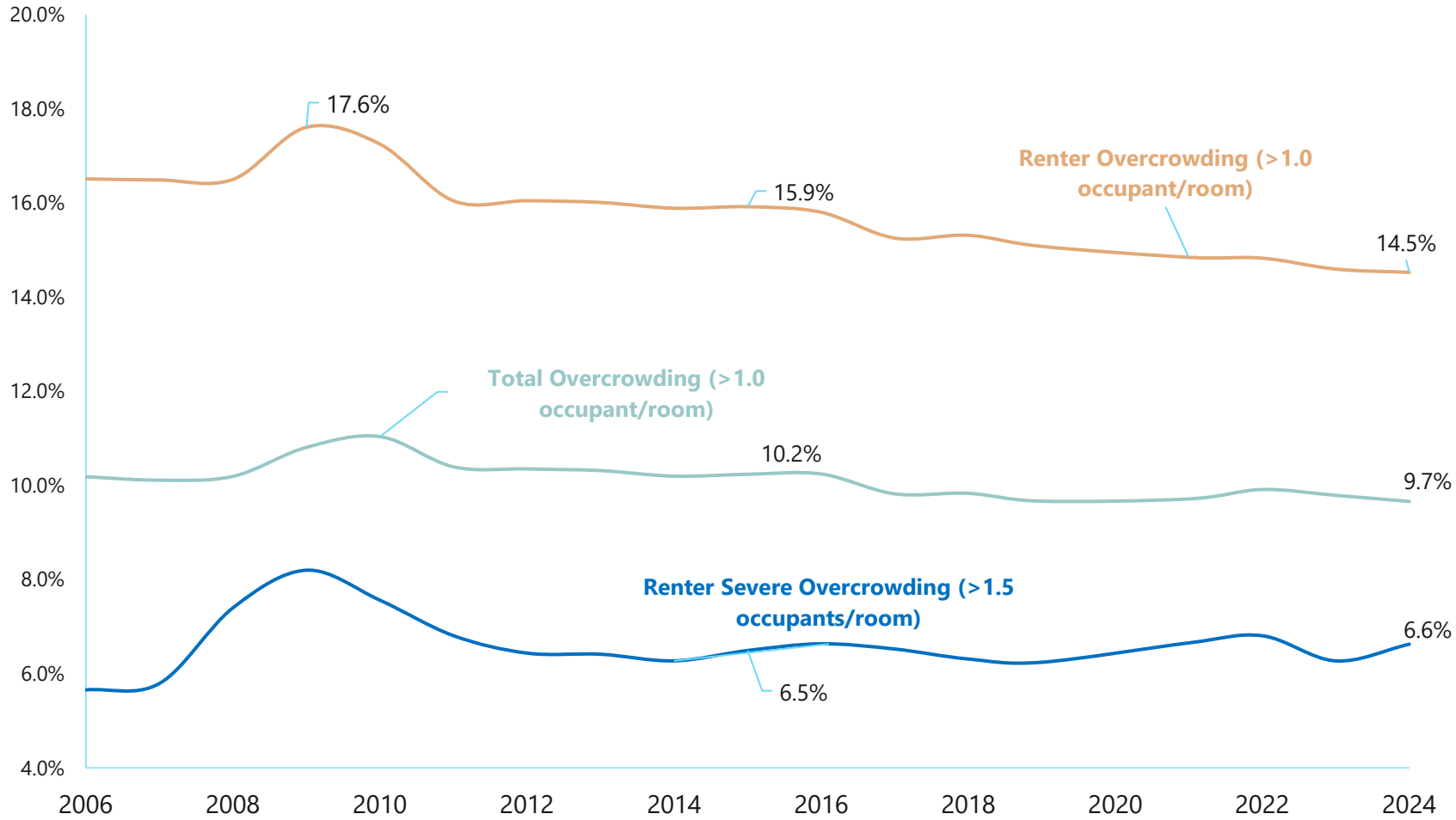
SCAG Region, 1991-2025



Source: CA DOF DRU E-2 July 2023 population estimates and U.S. Census Building Permit Survey, "New Residential Units from Building Permits Issued"

But, are we housing more people?

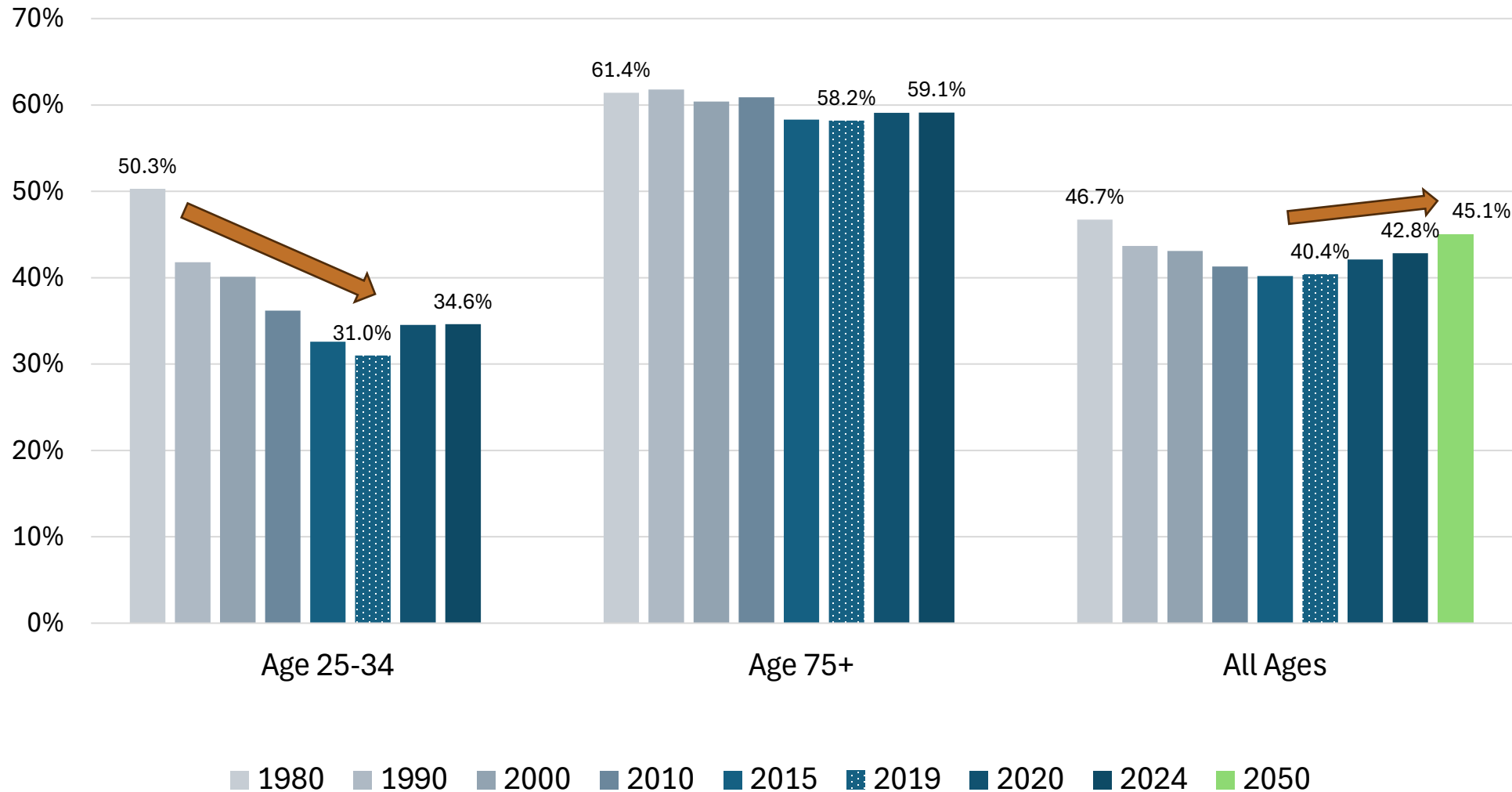
SCAG Region household overcrowding rates



Overcrowding source: American Community Survey 1-year Estimates.

Through the lens of a forecaster: *What percent of the population is a “head of household?”*

Household Formation Rates (%), SCAG Region, 1980-2050

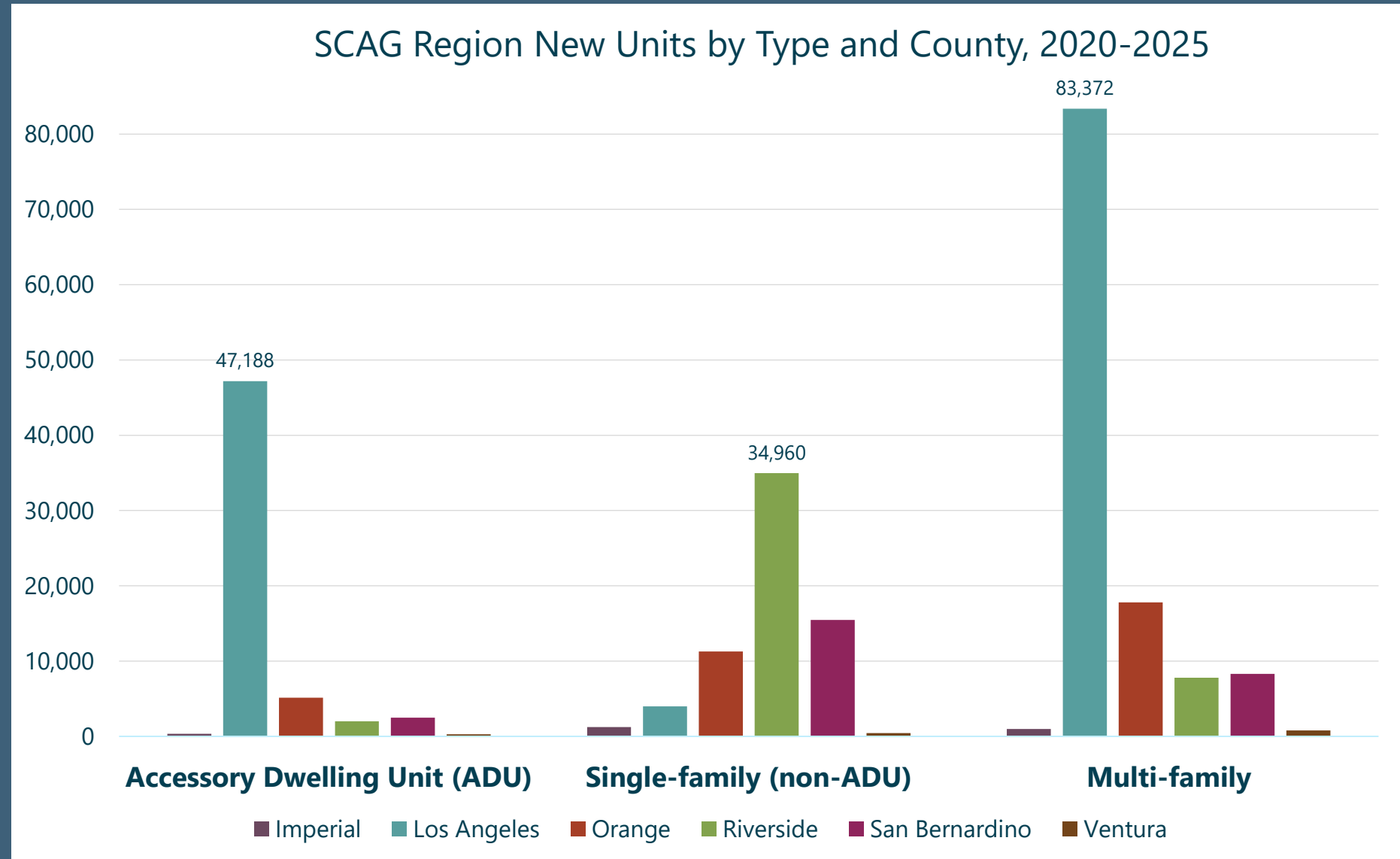
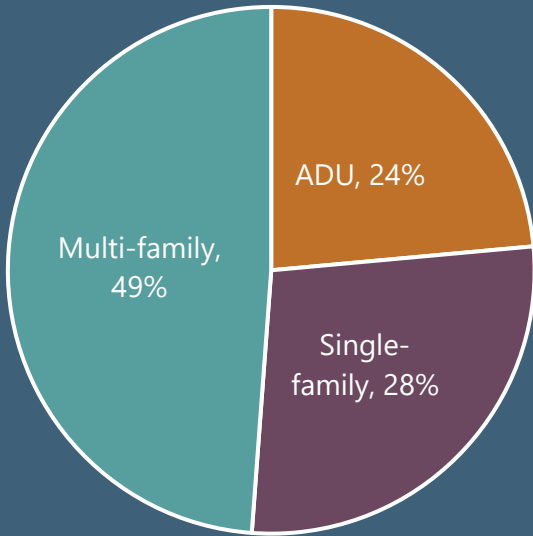
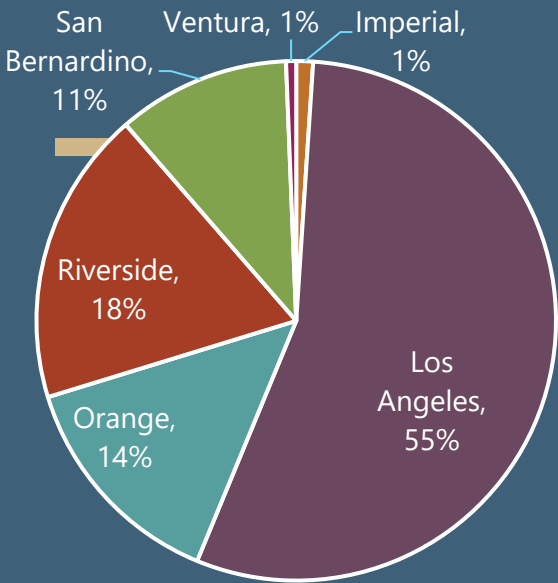


Older people consume more housing.

Historical trend appears to be reversing gradually.

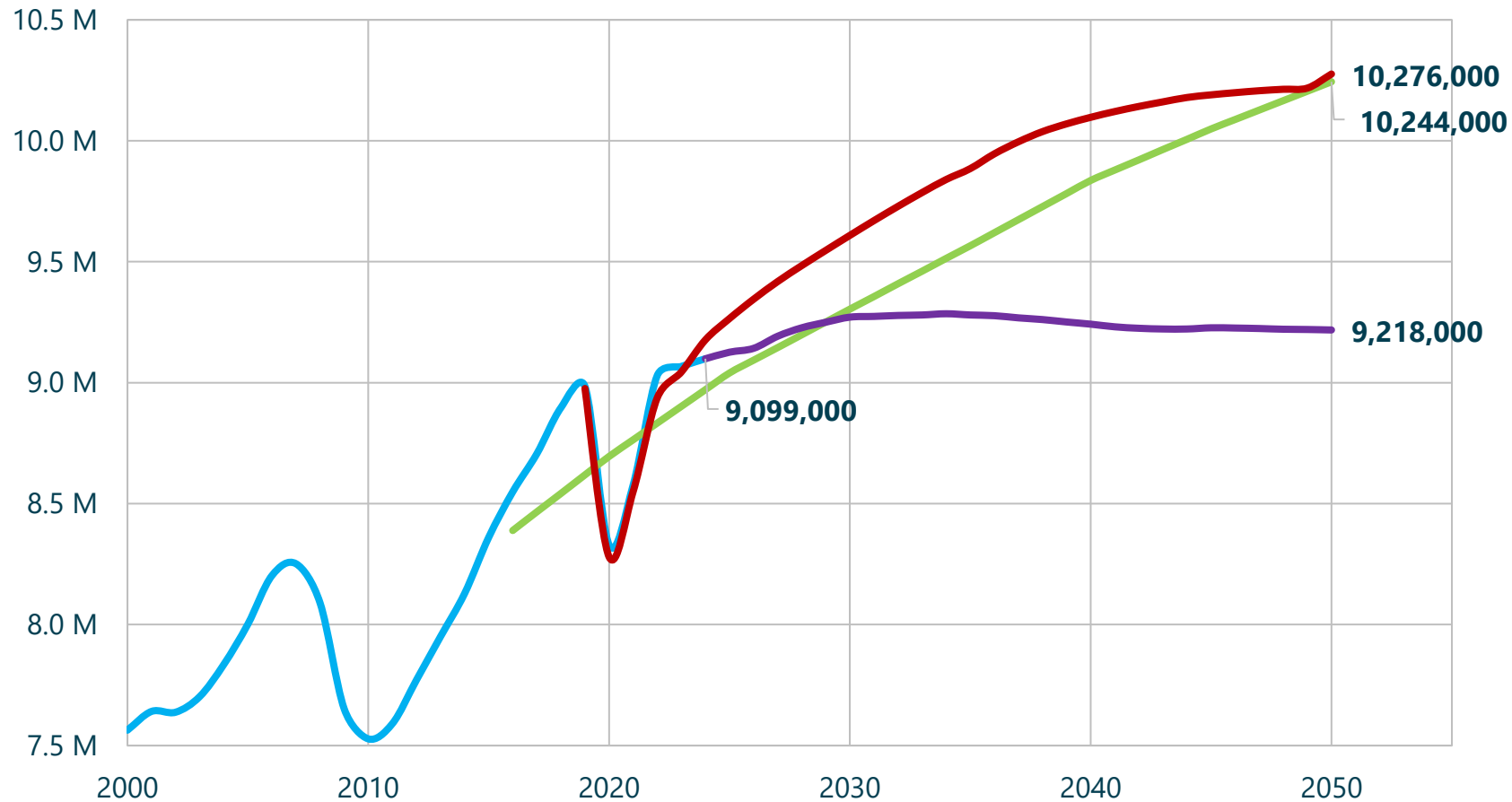
New housing can house more people.

Total housing production by type, 2020-2025



Sources: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2025. ADU counts are retrieved from DOF Demographic Research Unit Data Hub. ADUs from 2020 through 2021 reflect a nine-month estimate using the decennial census data from April 1, 2020. Residential permits come from the Census Building Permit Survey.

Preliminary Connect SoCal 2050 Employment Projection



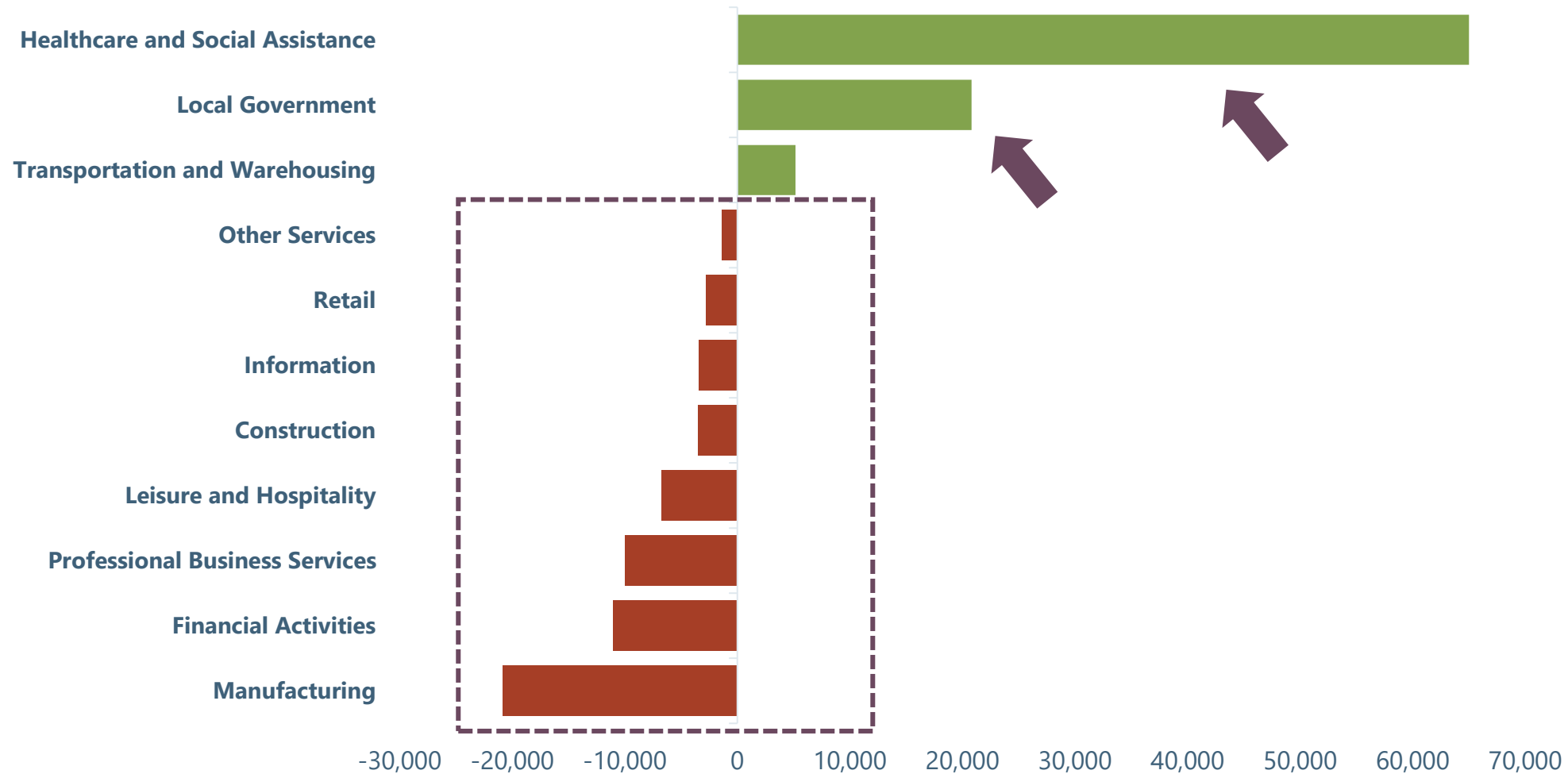
- Job growth follows population growth—flat beginning in 2030s
- AI and automation expected to impact nearly all industries

— Historical
— CSC 2020 (+14.19%)
— CSC 2024 (+12.98%)
— CSC 2050 (1.31%)

Sources: Percentage increases reflect 2024-2050. 2020 RTP/SCS plan horizon was 2016-2045, though preliminary projections were conducted through 2050. 2024 RTP/SCS plan horizon was 2019-2050.

Recent SCAG region job creation limited to healthcare and the public sector

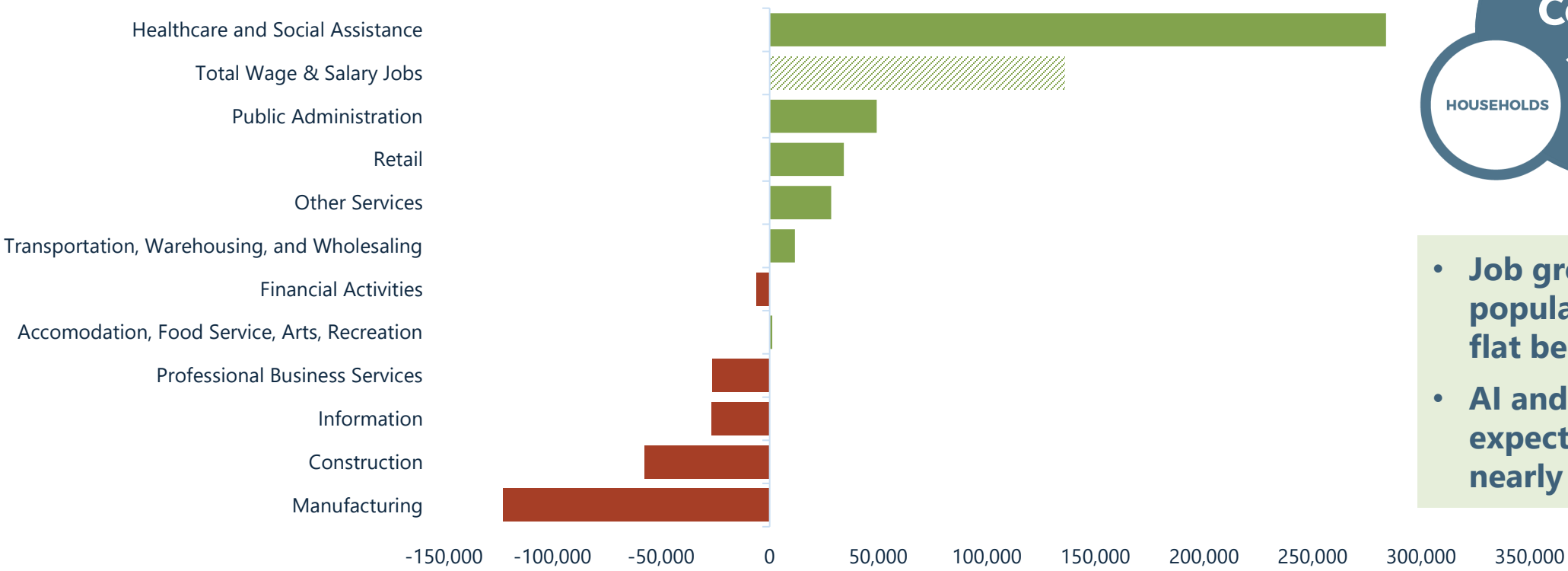
Jobs Created in 2025 by Sector, SCAG Region



Source: California Employment Development Department. Data for 2025 is annualized based on year-to-date performance relative to the same period in 2024.

Healthcare and Social Assistance Dominate Future Job Growth

Projected Job Growth by Major Sector, SCAG Region, 2024-2050

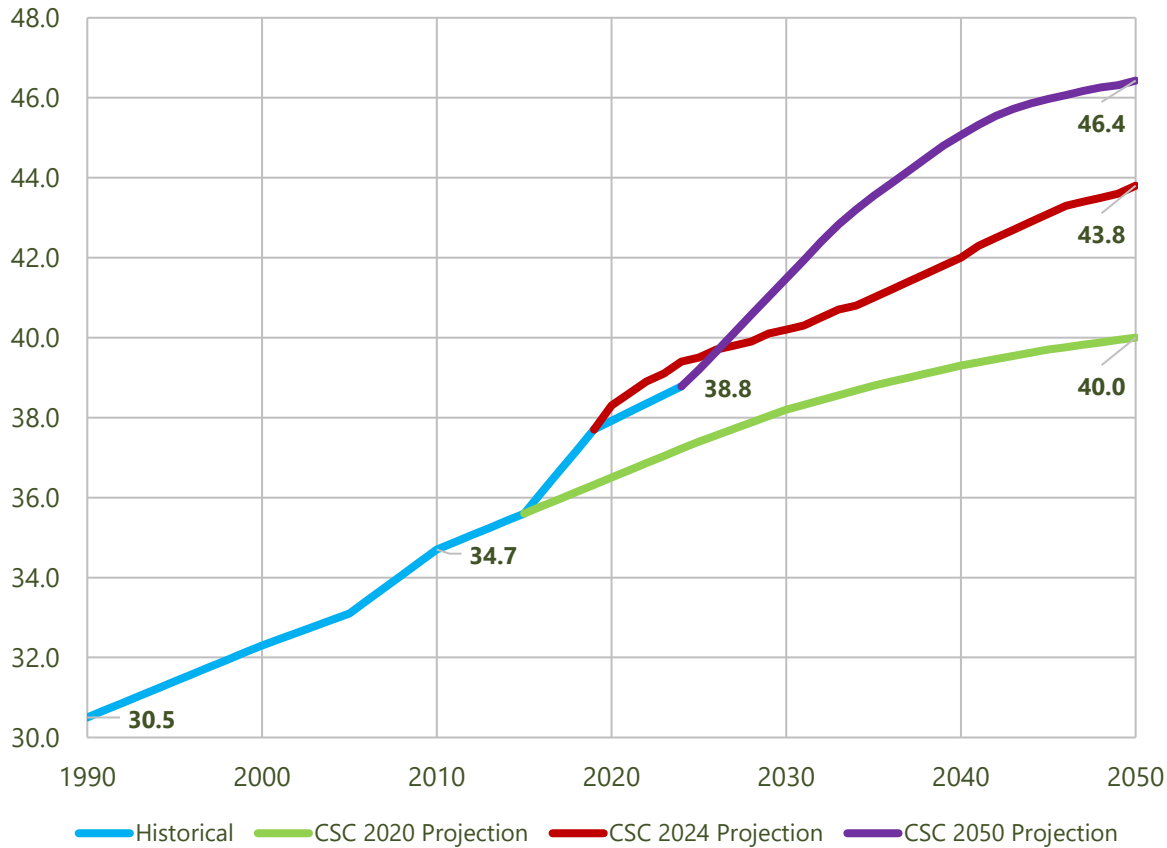


- **Job growth follows population growth—flat beginning in 2030s**
- **AI and automation expected to impact nearly all industries**

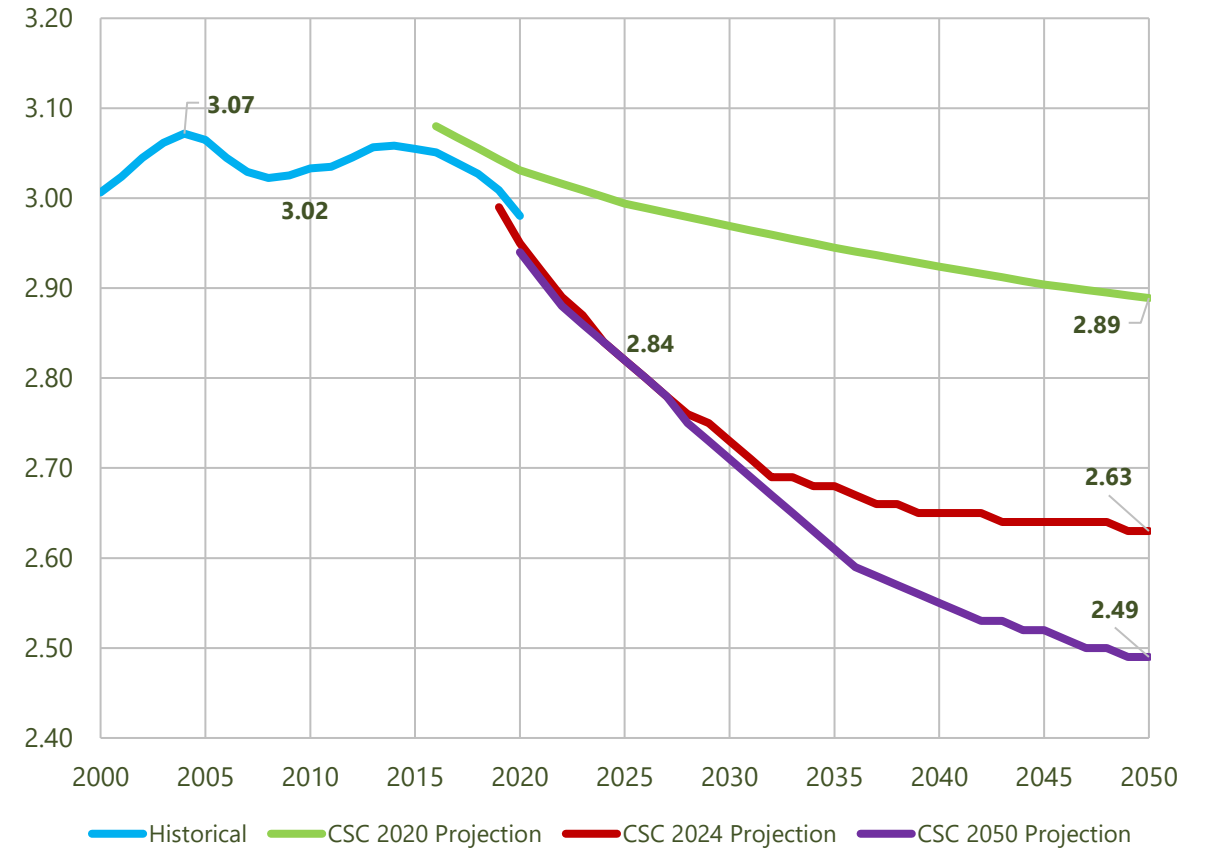
Source: Preliminary Connect SoCal 2050 projections. Aggregates of 2-digit NAICS sectors of wage & salary jobs shown.

Key Implications of Forecast Updates

SCAG Region Median Age



SCAG Region Average Household Size



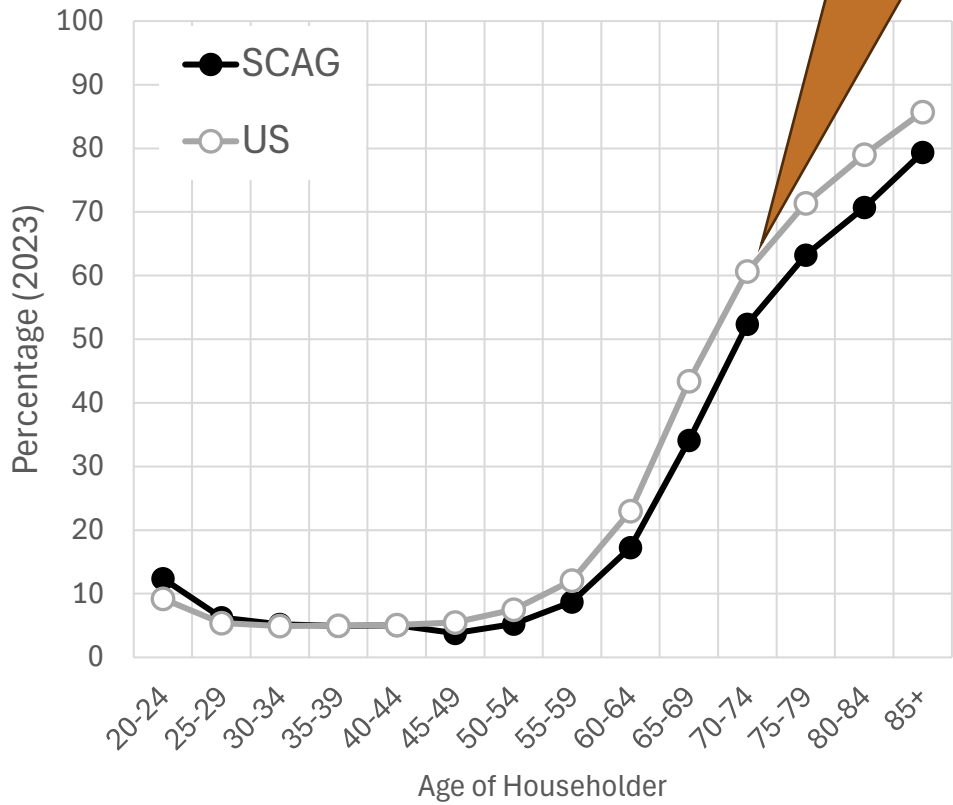
Note: Historical values interpolated from 5-year intervals.

How will workers be distributed across the available housing?

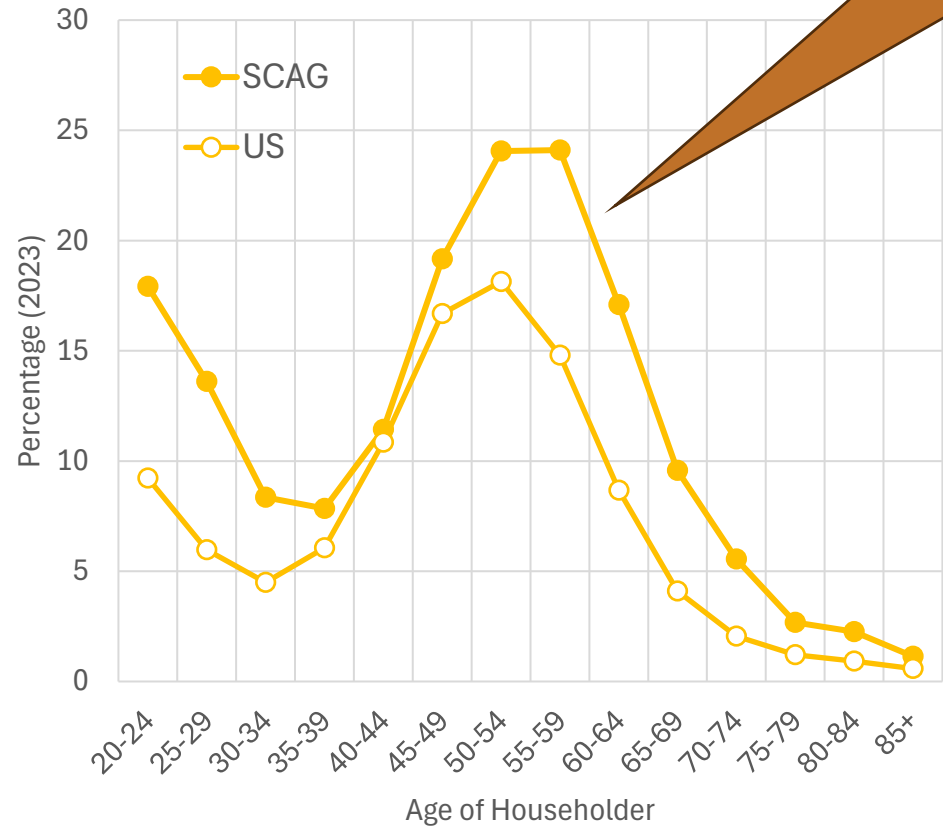
Most older households do not house a worker.

Many householders aged 45-65 provide housing for 3 or more workers in SoCal.

Households with no workers, by age



Households with 3 or more workers, by age



Recap

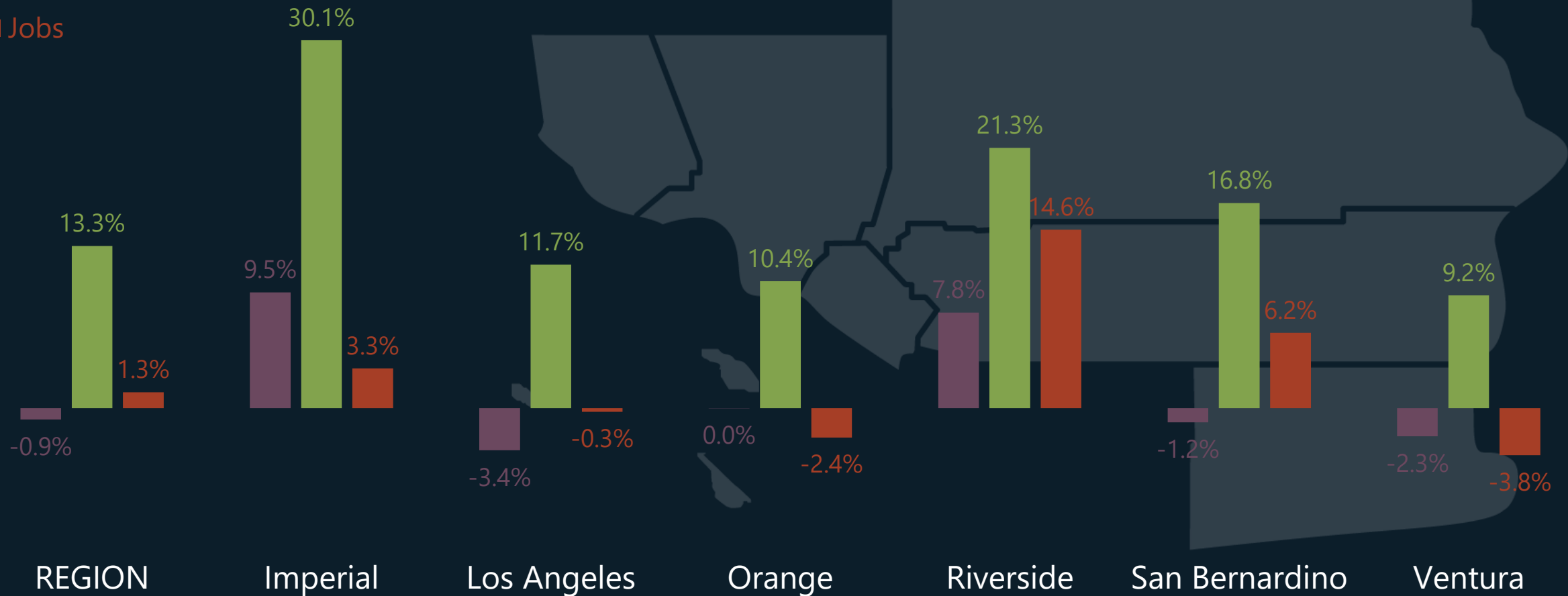
- Population will remain stable or decline slightly, and age substantially
- Housing growth will be slower than previously expected, but will continue to exceed population growth
 - Assumption: new units & supportive policy will help alleviate underhousing
- Job outlook flat, following low population growth and AI dispersion, and will be concentrated in Healthcare and Social Assistance
- Average household sizes will be much smaller;
 - Assumption: new units & supportive policy will help house workers, too



Preliminary Connect SoCal 2050 County Projections

Percent Change 2024-2050

- Population
- Households
- Jobs



For more information, please visit:

<https://scag.ca.gov/economic-insights-data-resources>

**Kevin Kane, PhD, Program Manager
Demographics and Growth Vision**

kane@scag.ca.gov

