SCAG

INNOVATING FOR A BETTER TOMORROW

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MEETING OF THE

TECHNICAL WORKING GROUP

Thursday, November 20, 2025
10:00 a.m. – 12:00 p.m.

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If members of the public wish to review the attachments or have any questions on any of the agenda items, please contact Kevin Kane at (213) 236-1828 or via email at kane@scag.ca.gov. Agendas & Minutes for the Technical Working Group are also available at: https://scag.ca.gov/technical-working-group

In accordance with the Americans with Disabilities Act (ADA), SCAG provides accommodations for persons who require them to participate in public meetings. SCAG also provides translations of its documents upon request in accordance with Title VI. Both services can be requested with at least 72 hours (three days) notice in advance of the meetings by calling (213) 630-1410.

1. County control totals for population, household, and employment
   Celena Mijares (PRB) & Kevin Kane (SCAG)
   30 minutes
   Packet Page 5

2. Local Data Exchange (LDX) update: communication and outreach
   Echo Zheng
   10 minutes
   Packet Page 30

3. Priority Development Areas (PDA) – detailed methodology
   Lyle Janicek
   15 minutes
   Packet Page 33

4. Green Region Resource Areas (GRRA) – detailed methodology
   Kim Clark
   15 minutes
   Packet Page 40

5. SCAG Public Participation Plan Update
   Ana Vallianatos
   10 minutes
   Packet Page 50

6. Draft LDX Survey
   Amanda McDaniel
   10 minutes
   Packet Page 53

Meeting Minutes (Abridged)

September 18, 2025
10 a.m. – 12 p.m.

The meeting was held via Zoom teleconferencing.

Meeting Attendance

MEMBERS

Anderson, Kelsie	TCA	Jenkins, Matt	City of Fountain Valley
Cortez, Joanna	City of Huntington Beach	Kadakia, Ruchita	County of Ventura
Craig, Crystal	Riverside LAFO	Kim, Susan	City of La Habra
Diep, Deborah	CDR/CSUF	Masters, Martha	RCTC
Emery, Edward	RCTC	Oliver, Tom	City of Los Alamitos
Gable, Emily	City of Los Angeles	Shiomoto-Lohr, Gail	City of Mission Viejo
Galicia, Omar	City of Los Angeles	Tendick, Jennifer	CARB
Glesne, Matt	City of Los Angeles	Tso, Kristin	OCTA
Guiaim, Charles	City of Anaheim	Werner, Joy	County of Ventura
Huddleston, Lori	LA Metro	Wikstrom, Alexander	City of Los Angeles

ALTERNATES & PUBLIC ATTENDEES

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Meeting Summary

1. CONNECT SOCAL 2050 LOCAL DATA EXCHANGE: OVERVIEW AND TIMELINE

Echo Zheng (SCAG) presented an overview on the Local Data Exchange (LDX) for Connect SoCal 2050. The overview included the LDX's purpose, Connect SoCal 2050 milestones, data categories and proposed changes, and timeline. Deborah Diep (CDR/CSUF), Kevin Kane (SCAG), Alexis Murillo-Felix (SCAG), and Gail Shiomoto-Lohr (City of Mission Viejo) participated in discussion.

2. CONNECT SOCAL 2050 GROWTH FORECAST & GROWTH VISION: A HIGH-LEVEL OVERVIEW

Kevin Kane and Kimberly Clark (SCAG) presented a high-level overview of the Connect SoCal 2050 Growth Forecast and Growth Vision. The overview included a look at region and county projections from the Sep. 9 panel of experts, preliminary small area household methodology, SB 375 and green region resource areas, and priority development areas. Gail Shiomoto-Lohr and Deborah Diep participated in discussion.

3. CARB'S EVALUATION OF CONNECT SOCAL 2024

Camille Guiriba (SCAG) presented on CARB's Sustainable Communities Strategy (SCS) evaluation of Connect SoCal 2024, mainly CARB's acceptance of SCAG 2024 SCS. Gail Shiomoto-Lohr, Philip Law (SCAG), and Emily Gable (City of Los Angeles) participated in discussion.

4. SCAG'S AI WHITE PAPER

Amanda McDaniel (SCAG) presented on the research SCAG conducted to explore and leverage artificial intelligence and big data, including the survey findings and resulting white paper.

SCAG 2028 RTP/SCS Forecast Panel of Experts: Motivating Facts, Discussion Questions, and Key Assumptions Made

Program Agenda

September 9, 2025

Noon-3pm

Schedule:

Noon	Welcome/Introductions	Beth Jarosz, PRB
12:10	Overview	Kevin Kane, SCAG
12:20	Births	Beth Jarosz, PRB / All
12:40	Deaths	Beth Jarosz, PRB / All
1:00	Migration	Beth Jarosz, PRB / All
1:20	Jobs	Mark Schniepp, CA Economic Forecast / All
1:50	Break (10 min)	
2:00	Labor Force Participation	Beth Jarosz, PRB / All
2:20	Households and Housing	Beth Jarosz, PRB / All
2:40	Wrap up	All
3:00	Adjourn	

Panelists

| Name	Affiliation
Billy Leung	Regional Economic Models, Inc.
David Swanson	UC Riverside
Deborah Diep	Cal State Fullerton, Center for Demographic Research
Dowell Myers	University of Southern California
Hans Johnson	Public Policy Institute of California
Jerry Nickelsburg	UCLA Anderson Forecast
Linda Wheaton	California Housing Policy Specialist (Emeritus)
Manfred Keil	Claremont McKenna College
Mary Prichard	Los Angeles Unified School District
Michael Lens	UCLA Luskin School of Public Affairs - Housing
Shannon Sedgwick	Los Angeles Economic Development Corporation
Somjita Mitra	California Department of Finance
Tina Kim	Los Angeles County, Department of Public Health
Wallace Walrod	Orange County Business Council
Walter Schwarm	California Department of Finance

Memorandum to Panelists

Date: September 3, 2025

From: Beth Jarosz, PRB

To: SCAG Forecast Panel of Experts

Subject: Background Information for SCAG Regional Growth Forecast Discussion

Even before the onset of the COVID-19 pandemic, population growth had been slowing in the SCAG Region, California, and nationwide. During our Panel of Experts meeting, we will discuss whether that trend will accelerate, continue at a similar pace, or reverse. Because a region's population changes through births, deaths, and net migration, these factors—and their effect on population growth—will be the focus of our demographic discussion.

The following sections provide historical context on age structure, births, deaths, and migration to describe the trends that have resulted in slowing population growth to date. Projections from the U.S. Census Bureau and California Department of Finance (DOF) are provided as context.

*Figure 1: All Projections Show Slowing Rate of Population Growth 2020-2060*
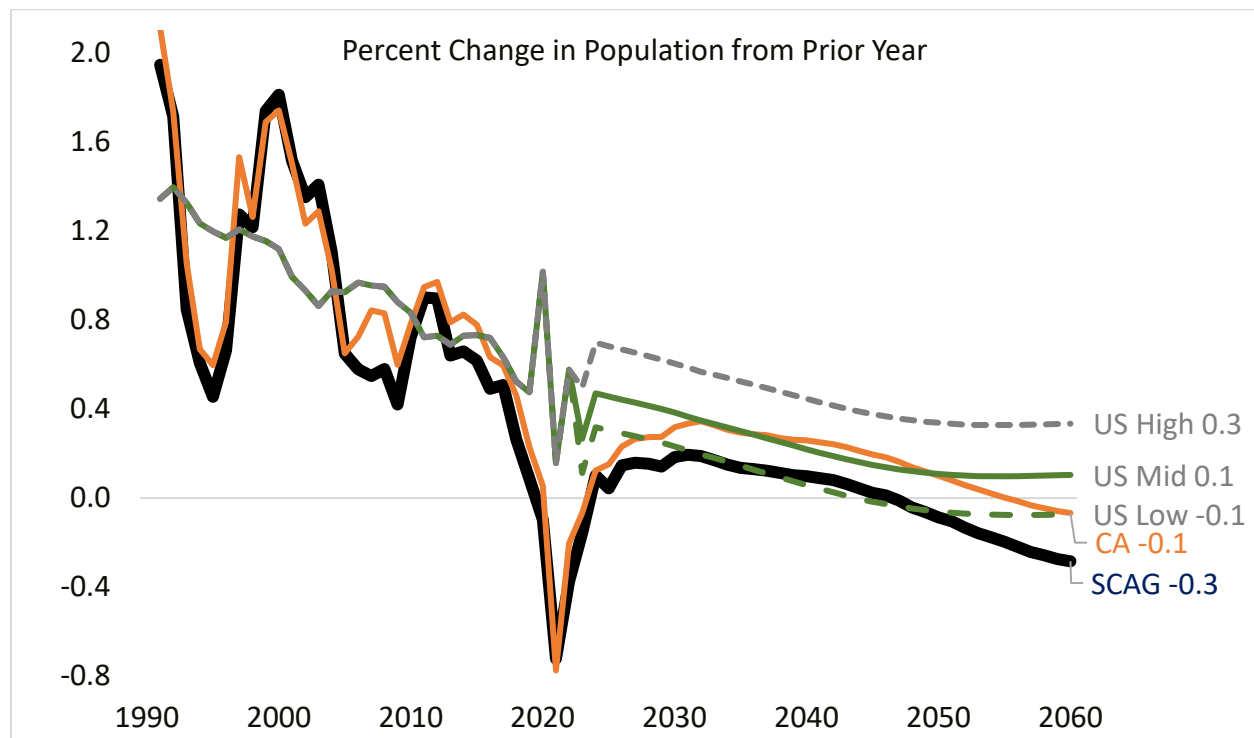
Sources: U.S. Census Bureau, Population Projections (Vintage 2023); California Department of Finance, Population Projections (Vintage 2025).

The SCAG region population is expected to age considerably in the coming decades. Figure 2 shows the age structure in 2020, and a comparison with 2010, based on estimates from DOF. The bottom of the population pyramid is reflective of a declining child population (for example the population ages 0-4 in 2020 is smaller than that of ages 5-9 (who were the children ages 0-4 in 2015). This structure is consistent with falling birth rates that have been seen in the region, and nationwide, for more than a decade.

Another key feature of the population pyramid in 2020 is the relatively small share of women ages 20-24 (and younger), relative to those ages 25-29 and 30-34. This is notable because birth rates are highest between the ages of 25 and 34. Even if birth rates were to stabilize for the next ten years, there will be fewer women ages 25-29 and 30-34 by 2030 (barring major shifts in migration), and that will result in a substantial decrease in the number of births in the region.

Age structure will also be an important consideration for migration, mortality, labor force participation, and household formation. Each will be described in detail below.

Figure 2: SCAG Region Population Age Structure Suggests Continued Population Aging
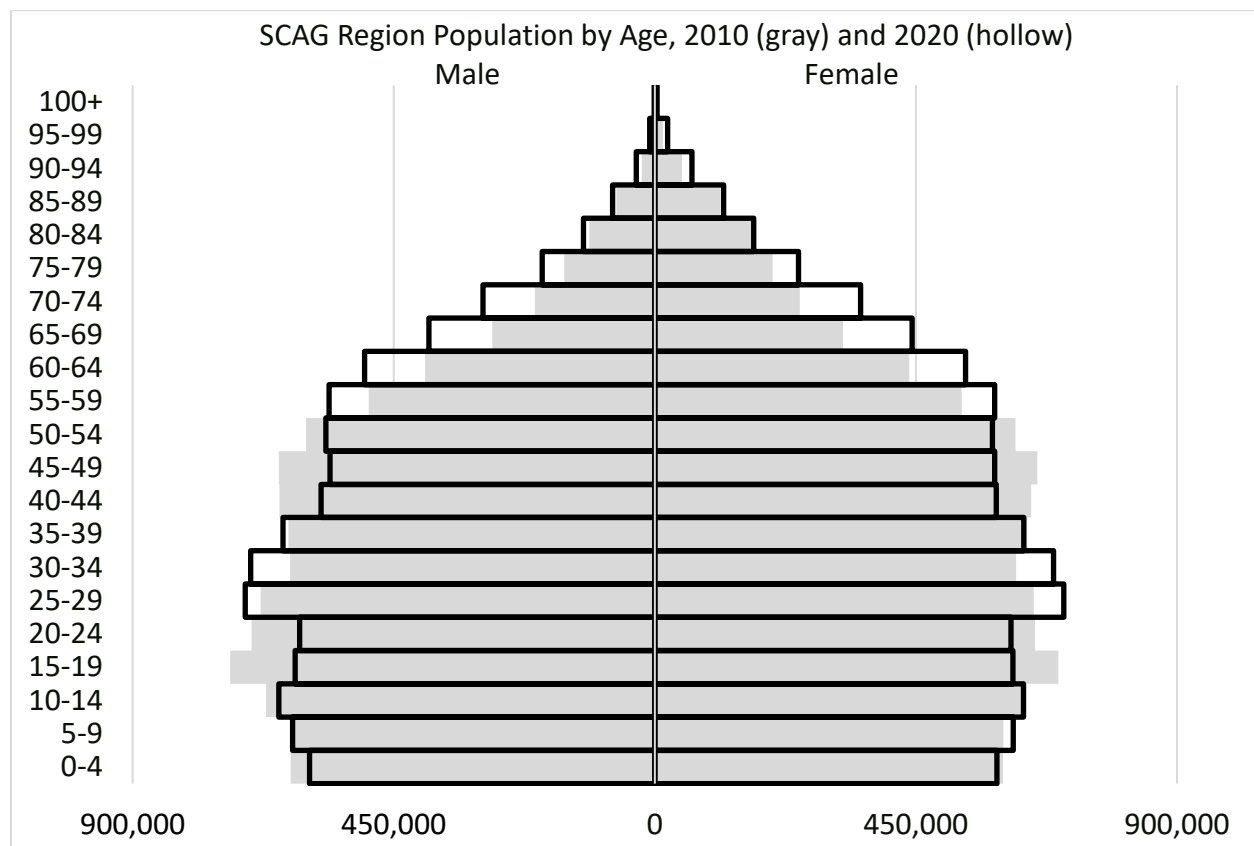

Source: California Department of Finance.

Births

Birth rates in the SCAG region, California, and the U.S. have been falling for more than a decade—especially at the younger ages. (See Figure 3 for SCAG region rates.) Some of the most dramatic declines have been at ages 20-24, which fell from more than 100 births per 1,000 women in 2007 to approximately 50 in 2019, and ages 25-29 which was the age group with the highest birth rate until 2011, when it fell below the rate for ages 30-34. Even the rate for ages 30-34, which had been stable or slightly increasing, has fallen every year since 2016.

Figure 3: Birth Rates at Younger Ages Have Been Falling For More Than a Decade
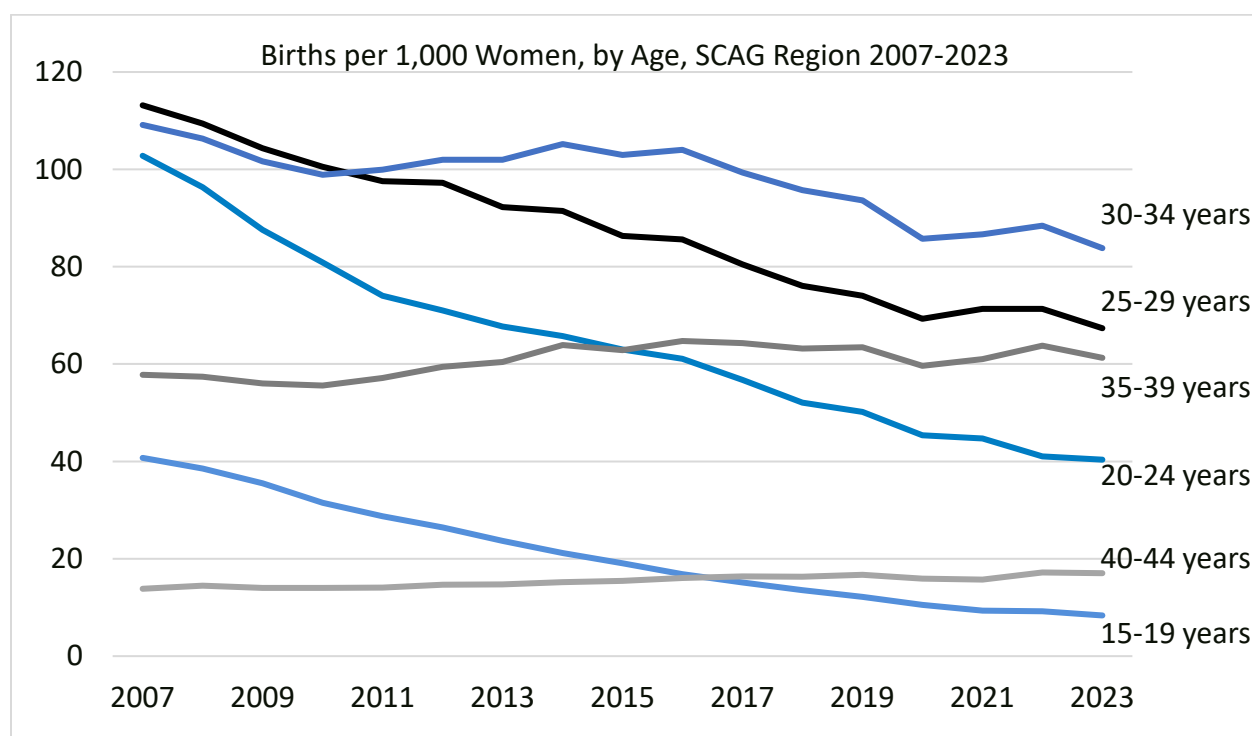
Source: CDC WONDER

This pattern, coupled with expected declines in the young adult population, is expected to reduce the total number of births in the region.

Questions for Panel Discussion:
- What factors may increase or decrease fertility rates?
- How might those trends vary by demographic subgroup?
- Which trend (increase or decrease) will prevail?

Highlights from the Panel of Experts:
"Birthrates in counties across America, not limited to CA, are falling."

"Nativity foreign-born birth rates have fallen to match Mexico's rate. Current immigrants come from a lower birth rate regime."

"There is no international evidence that policy can bring TFR to replacement levels."

"Evidence shows that bumps from pronatalist policies may have a small bump, but it does not last."

Summary and Assumptions:

In a survey sent to the experts prior to the panel, respondents expect SCAG birthrates to fall over the next 30 years for across all age groups. At the convening, experts cited low birthrates across the U.S. and globally. Lower birth rates in sending countries, mean fewer immigrants to come over. Furthermore, those that do are likely to have fewer children when they settle. Based on expert comments, the forecast assumes birth rates will continue to fall for the next decade after which rates are held constant.

Deaths

Mortality rates rose for all groups during the COVID-19 pandemic and by 2023 still had not returned to pre-pandemic levels. In the pre-pandemic period, the SCAG region trend had been toward declining mortality at most ages. However, starting in the mid-2010s rates began rising for ages 20-34 and 35-54. (See Table 1. Bold shows the lowest rate for each age group.) In 2019 the death rate for young adults ages 20-34 was higher than the rate at the end of the 1990s. And rates for ages 55-64 showed only modest improvement in the 5 years preceding the pandemic. A growing body of research suggests this mortality trend is driven by increasing rates of substance abuse, suicide, and rising cardiometabolic mortality. While overdose prevention efforts have shown promise in reducing deaths, it is unclear what the long-term trend will be.

Table 1: SCAG Region Death Rates Had Been Rising for Ages 20-34 and 35-54 Before the COVID-19 Pandemic
SCAG Region Deaths per 100,000 Population, by Age Group (Lowest Rate in Bold Text)

Year \ Age Group	0-19	20-34	35-54	55-64	65 and older
1999	56	82	259	896	5,339
2004	54	83	253	792	4,974
2009	48	74	240	719	4,555
2014	39	**71**	**216**	701	4,061
2019	**34**	88	221	**696**	**3,423**
2023	37	116	257	718	3,487

Source: CDC WONDER

Questions for Panel Discussion:
- What factors may increase or decrease mortality rates?
- How might those trends vary by demographic subgroup?
- Which trend (increase or decrease) will prevail?

Highlights from the Panel of Experts:

"65+ mortality is declining because of a large wave of young baby boomers aged into that category."

"Another pandemic-like event within the next ten to 20 years will cause mortality to increase. "

"Dismantling of social safety nets create headwinds for mortality at least in the next 5-10 years if not longer."

"Roberts and Hummer's research indicate risks to young adult mortality are expected to persist post-pandemic."

"We've never experienced the size of this dependency ratio—there's no financing or workforce available for older adult's care."

"Given the current climate in funding, advances in medical care are looking unlikely."

"To add to the pessimism, health costs are increasing as a share of state budget, personal budget, etc. What can we afford?"

"On the rising budget share….. there has to be a limit, beyond which mortality rises more."

Summary and Assumptions:

Recent data show that mortality trends remain elevated after the COVID-19 pandemic. Based on survey responses, most experts predict death rates to remain constant or fall slightly over the next 30 years. Discussion during the panel of experts centered around apprehension that medical advancements and longevity gains will happen in the future due to recent cuts in research and the financial burden governments face a large dependency ratio. Based on expert feedback, the forecast holds death rates constant.
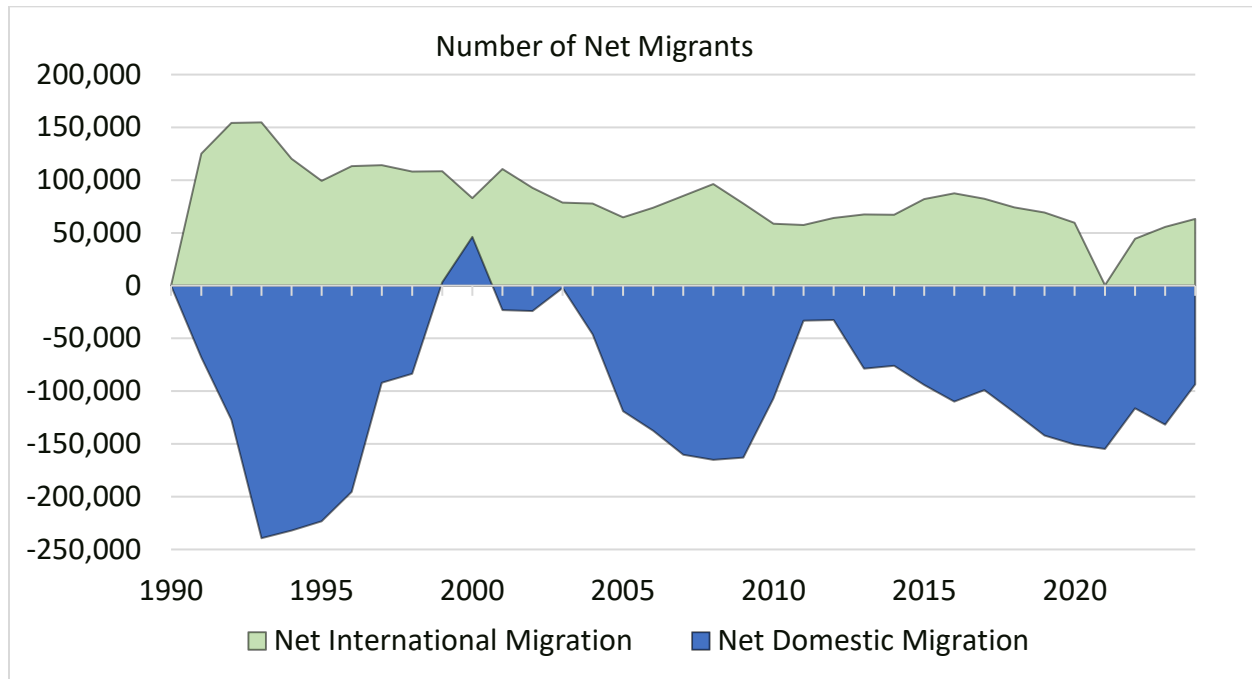
Net Migration

Over the past 30 years (with the exception public health emergency period during the COVID-19 pandemic), net international migration has seen net in-flows to the SCAG region, while net domestic migration has been a net out-flow for all years except a brief period at the end of the 1990s. (See Figure 6) Some sources are suggesting that the immigrant population in the U.S. declined in the first half of 2025, suggesting that there may be an international net outflow underway.[1]

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[1] Pew Research Center. 2025. "What the data says about immigrants in the U.S."
https://www.pewresearch.org/short-reads/2025/08/21/key-findings-about-us-immigrants/

Figure 4: Since 1990 SCAG Region Has Typically Seen Net International In-flows and Net Domestic Out-flows

Source: California Department of Finance.

Questions for Panel Discussion:
- What are some domestic in/out migration factors that may affect future migration levels differently than they have in the past (e.g., climate, water)?
- What should we expect U.S. immigration levels to be in the next 5 years? 10 years? 30 years?
- How will the U.S. share of immigrants to the SCAG region change?
- How might the demographic characteristics of international migrants (age, country of origin, permanence) change?

Highlights from the Panel of Experts on Domestic Migration:
"Could in-migration due to climate change account for loss of young people?"

"It's our one saving grace. I don't see it affecting birth rates directly, but people who move to California will be wealthy. This type of migrant has lower fertility, but better health outcomes."

"California had out-migration when we accounted for insurance and cost of housing."

"I expect larger forced migration due to climate change."

"18-40 are the most prolific movers in the data. AI is affecting entry level jobs, so young people might not be able to move to find jobs in the future."

"Education is an important factor; Dallas is targeting middle management. Migrants trained in California early in their career move once they have families."

"Older adults with home equity may seek larger housing outside the of the SCAG region. Average housing prices in CA are 1.1 million, compared to 450K Dallas and 420K in Arizona."

"Taxes will limit older adults cashing out."

"Does Prop 13 or the lock-in effect play a role?"

"I am skeptical people would leave sunny, temperate California with a fully paid-off home. Base it on the data—have we seen that trend?"

"65+ moving has increased, but long term 20-30 years fewer people will be affected as the proportion of renters in the population increases."

"My research found return migration within ten years especially by women who live longer than their male partners at older ages."

"There is a limit on how low out-migration can go. I don't see LA having large swaths of land being empty like in Detroit."

"CA has always been a premium because of its amenities."

Summary and Assumptions:

As part of the discussion on domestic migration, PRB polled panelists on the most important factors for domestic migration. The number next to the factor indicates how many experts considered it important.

"What factors are most important to push/pull factors to the SCAG Region?"

- Affordable housing – 6
- Education resources - 1
- Socioeconomic policies - 2
- Climate - 4
- Job opportunities -5
- Cost of living –2

The SCAG Region has had a net outflow of domestic migration for the past 20 years. Expert survey responses predict a moderate outflow of residents across all age groups. The Panel of Experts discussed a wide range of factors that could affect domestic migration: climate change, housing affordability in California and other states, Prop 13, and job availability given AI. Given the wide range of factors, panelists did not come to a consensus on the extent of the outflow. The forecast assumption made generally followed DOF's September 2025 projection series and gradually drops domestic out-migration from 2025-2029, holding constant after 2030 and making minor adjustments based on job balance.

Highlights from the Panel of Experts on International Migration:

"This is out of our purview. It's a matter of diplomacy. China and India are huge and we are relatively close by. Mexico is dried up [in terms of a major source of in-migrants]."

"We need magnets for international migration (jobs, affordability). California doesn't have many of those left."

"SoCal colleges are magnets that become anchors. I think they will be larger and more global/ diverse in 2060, but it's hard to be sure with the recent attacks on higher education."

"International migrants are more adaptable at handling housing affordability." ▨
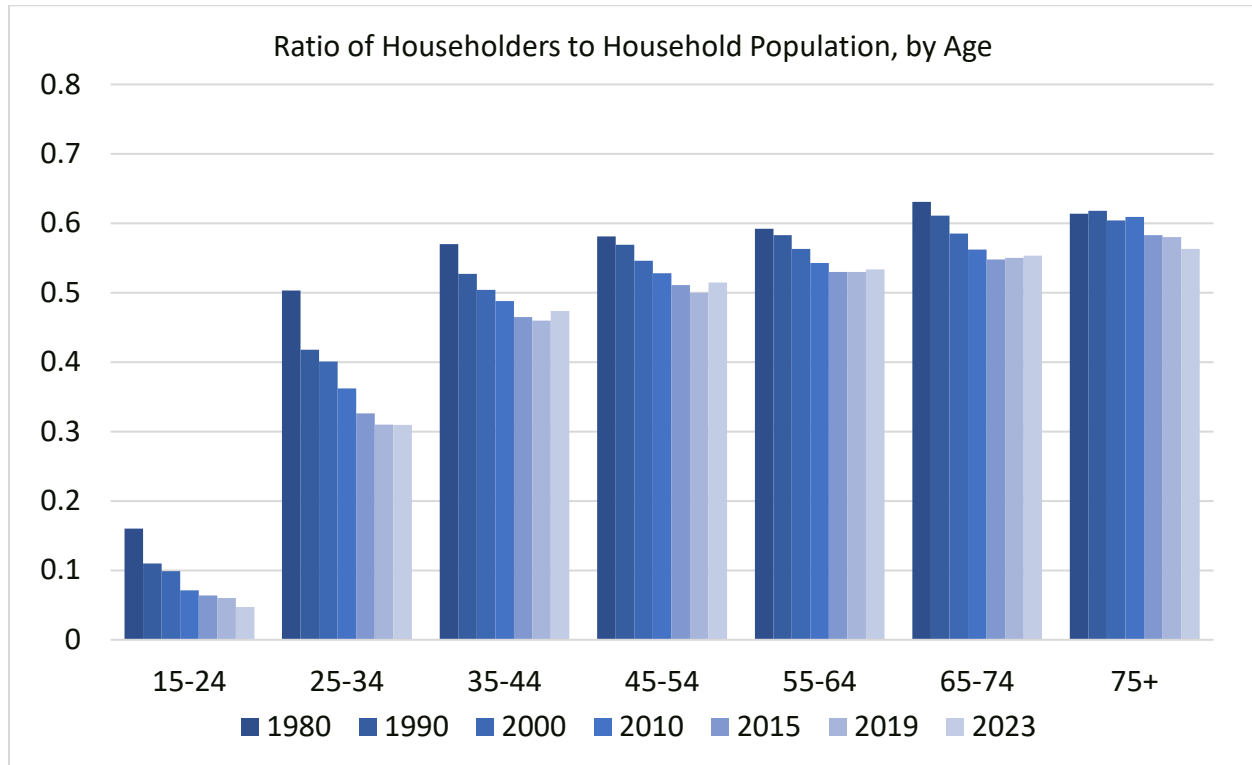
Summary and Assumptions:

Apart from the first year COVID-19 pandemic during which international migration was nearly zero, the SCAG region has maintained a net positive international migration since 1990. Survey responses from most experts anticipate this trend to continue among children and young adults. Survey responses about older adults were equally split among some out, net zero, and some in. The Panel of Experts pointed to federal policy being the driving source of international migration trends. For this reason, the forecast tied international migration to U.S. Census Bureau population projections. Historically, the SCAG region has accounted for 7% of total U.S. immigration. From 2030 onward, the forecast assumes the SCAG region will receive 7% of the main series' immigrants. Given current federal government policies on immigration, from 2025 to 2029, the forecast assumes immigration levels slighlty below the Census Bureau's low series projection.

Households

Household demand is affected by a wide variety of factors, but some basic patterns of household headship vary throughout the life course. (See Figure 7.) Rates tend to be lowest at youngest ages, as youth and young adults stay with their families or live with roommates—and those rates have been falling for decades as markers of the "transition to adulthood" (completing schooling, beginning full-time work, becoming financially independent, getting married, and becoming a parent) have been shifting to older ages. Rates tend to be highest at the oldest ages. Rates also vary by race/ethnicity.

Over time, rates had been falling for most ages (with dramatic declines in rates for teens and young adults since the 1980s and 1990s), but have plateaued or risen slightly across many age groups since the mid 2010s.

Figure 5: Headship Has Been Falling at the Youngest Ages, Trends Mixed at Other Ages

Ratio of Householders to Household Population, by Age

Legend: 1980, 1990, 2000, 2010, 2015, 2019, 2023

Source: U.S. Census Bureau

Household formation is also affected by the supply and cost of housing. Housing construction dropped considerably in the wake of the Great Recession, and while it has rebounded somewhat in more recent years, it remains well below historic peaks. (See Figure 8.)

Figure 6: Number of Housing Units Permitted Per Year Varied Greatly in the Past But Has Been Stable In the Most Recent Decade.
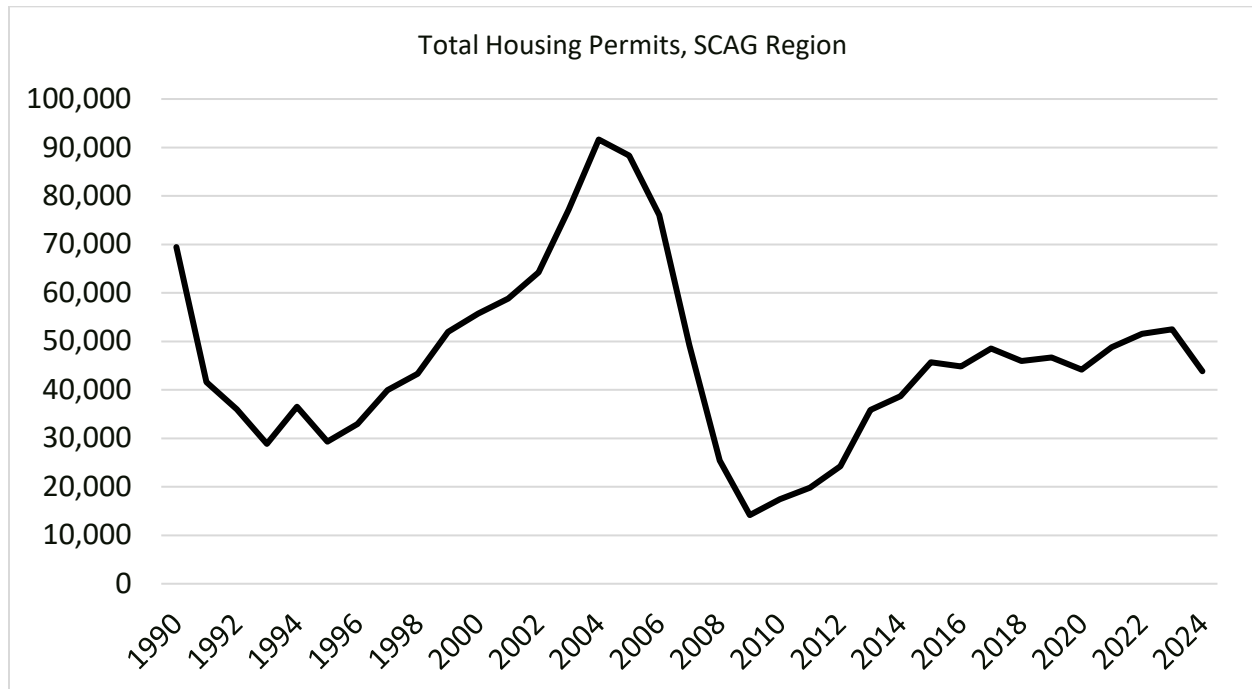
Source: Analysis by SCAG of CIRB Building Permit Data

Questions for Panel Discussion:
- What factors may increase or decrease household headship rates?
- Which trend (increase or decrease) will prevail?
- How might those trends vary by demographic subgroup?
- What factors may increase or decrease housing production?
- Will housing supply (mix of unit types) affect net migration?

Highlights from the Panel of Experts on Households:

"In the past 30 years housing production did not keep pace with population. The future outlook suggests production will catch up. ADUs are not always actual housing—many are treated more like an addition to the main house."

"San Diego survey of detached ADUs showed that 85% went onto rental market."

"Average household size went down recently (but vacancy didn't change). Most ADUs are 1 bed (or less) and nearly all are 2 or less. They don't fit many people. Places with population increase are those that are adding larger SF units with more bedrooms."

"I am not optimistic about addressing the housing problem. Barriers are more than state legislation can overcome. (Have been trying to change developer patterns for 20 years and still quite difficult to do infill.) The uptick was due, at least in part, to increased subsidies."

"Unless you have major rewrite of CEQA, coastal housing, etc... the impact of policies from Sacramento are marginal. There appears to be some modest CEQA reform coming on-line in the near-term."

"Stability for permitting over past decade may at least in part be the marginal benefit of new state policies."

"... another of the housing supply constraints that pro-housing policies are unlikely to overcome is the major contraction of the housing industry that has occurred and is only exacerbated by the anti-immigrant actions of the Trump administration."

Summary and Assumptions:
Headship rates for ages 25-74 have begun to increase after 30 years of decline. Headship rates for 15 to 24-year-olds and those 75 and older continue to fall. Survey responses indicate that the majority of experts predict a slowing household growth rate, the only questions to have 75% of respondents in the same category. Similarly, most experts anticipate housing growth to be the same as the 2015-2025 average. Regarding the housing supply, experts expect housing types with smaller footprints (multifamily, ADUs, and single family attached) to grow in share of the overall supply.

During the panel, discussion mostly centered on housing supply. Experts were split on the role of accessory dwelling units (ADUs) in addressing market needs. They were also split if recent housing policy changes were enough to spur enough new housing development. Given the lack of consensus of the panel of experts, the forecast assumes that the modest increase in headship rates observed between approximately 2019 and 2023 continues for the next decade, after which rates are held constant.

Jobs

In 2025, California's unemployment rate was 5.5%, the highest in the nation. Only 66,000 jobs were created, nearly half that of the previous year. Only three industries added jobs: healthcare, the public sector, transportation and warehousing. A. I. investment is at a record high, coinciding with significant layoffs in information technology, software development, and advanced manufacturing sectors.

Figure 9: Job Creation in California is Slowing.
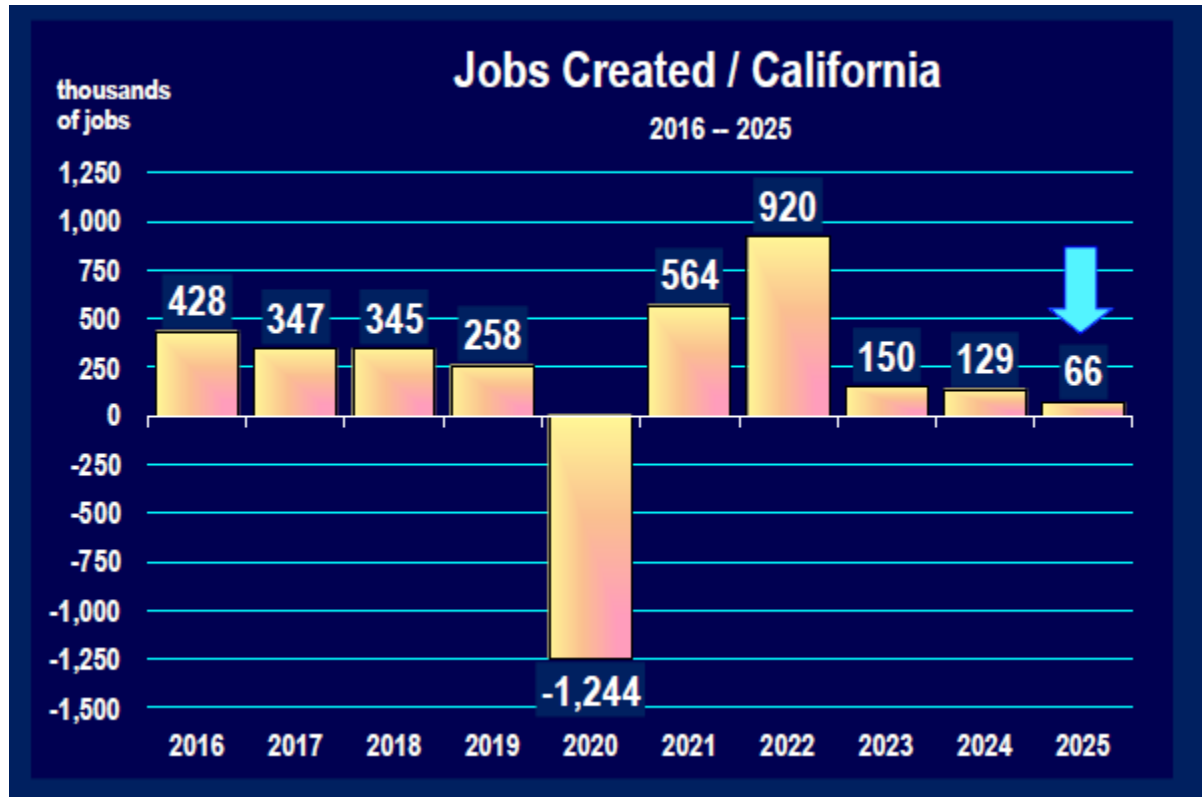
Source: CA EDD

Questions for Panel Discussion:
- What factors may increase or decrease job creation?
- Which trend (increase or decrease) will prevail?

Highlights from the Panel of Experts on Households:
"These numbers are optimistic. We have A.I. adoption affecting healthcare also."

"In healthcare, there are bifurcation tastes and preferences. Boomers want the old way, but younger generations want technology. [Lack of] immigration will speed up tech adoption and job loss."

"Technology replacing labor will increase in later years of the forecast, as population ages"

Summary and Assumptions:
Forecasted jobs are based on UCLA Anderson's Economic short-run forecast and constrained by working age population. Preliminary projections anticipate decreases in manufacturing and information jobs, due

in part to A.I. adoption. Population serving industries like health care, leisure and hospitality, and state and local government will continue to grow until a point in the 2030s, after which they will begin to decline, following the trend in population. Experts commented that this initial long-range outlook may be somewhat optimistic.

Labor Force

Historically, labor force participation rates in the SCAG region have been somewhat higher than national averages, but have followed similar demographic patterns. For both men and women, rates have been falling for teens and young adults. Trends at other ages are more complex. For men, rates for ages 25-54 rates fell until the mid 2010s then rose slightly in more recent years. Rates for ages 55-64 have been rising, and rates for ages 65-74 and 75+ were rising, but dipped during the pandemic. For women, rates for ages 25-54 dipped in the mid 2010s and have been rising since. Rates for ages 55-64 have been rising, but slowly in recent years. Rates for ages 65-74 and 75+ were rising but dipped slightly during the pandemic.

Figure 10: U.S. Bureau of Labor Statistics Projects Rising Labor Force Participation Rates at Older Ages by 2033.
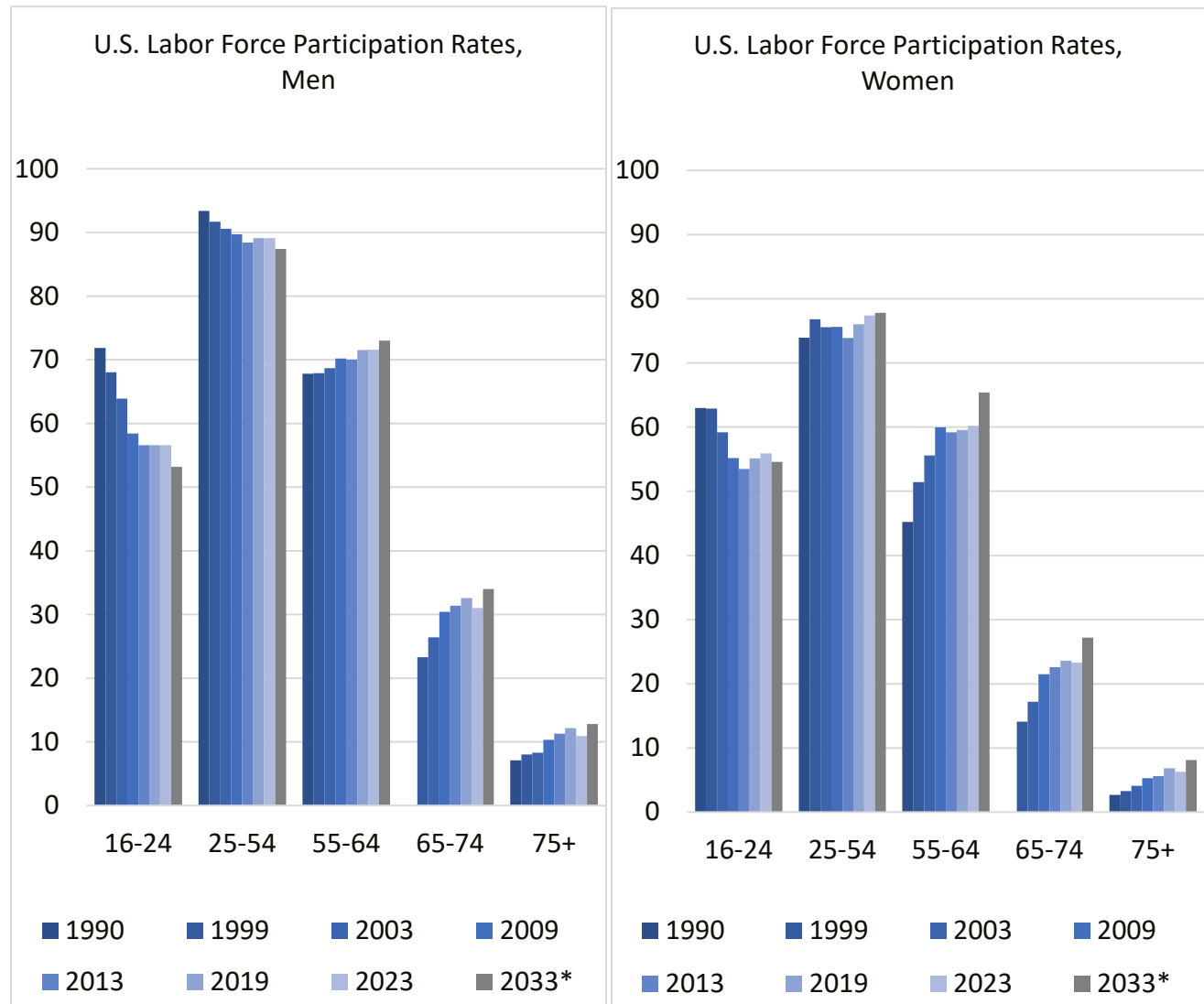
Source: U.S. Bureau of Labor Statistics

Questions for Panel Discussion:
- What factors may increase or decrease labor force participation rates?
- How might those trends vary by demographic subgroup?
- Which trend (increase or decrease) will prevail?
- Will SCAG region LFPR's remain considerably higher than national?

Highlights from the Panel of Experts:
"Bureau of Labor Statistics projections look about right."

"Are gig and part-time workers included as equivalent to full-time participation? To sustain LFPR, should there be investment in older-worker training and healthcare?"

"I look at cohort rates. Women's rates are changing. If jobs hit the population downturn, the rubber meets the road, and older people will be laid off. They are more expensive."

"I agree with the likelihood that the older cohorts will still be attached to the labor force, due to financial concerns/considerations"

Summary and Assumptions:
The Bureau of Labor Statistics (BLS) anticipates labor force participation rates to continue to fall for those 16-24 and increase for those 55 and older. Survey responses anticipate rates to stay the same. Experts voiced that labor participation rates for older ages may rise due to financial considerations. However, in the event of an economic downturn, they would be the first to be let go. The forecast uses age, sex, and race/ethnicity-specific labor force participation rates based on REMI projections for the SCAG region with additional adjustments for specific age and race/ethnicity categories in line with BLS trends.
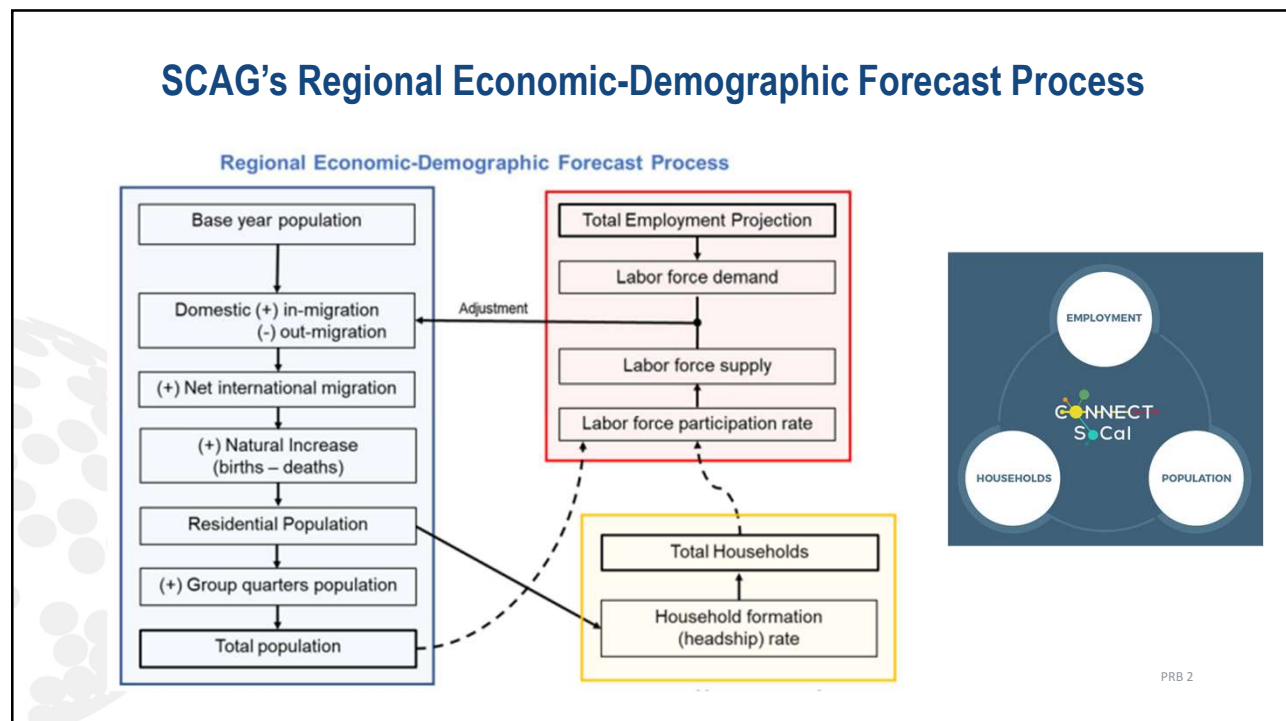
Slide 1

2025 SCAG Technical Working Group

Demographic Trends and SCAG Connect SoCal 2050 Forecast
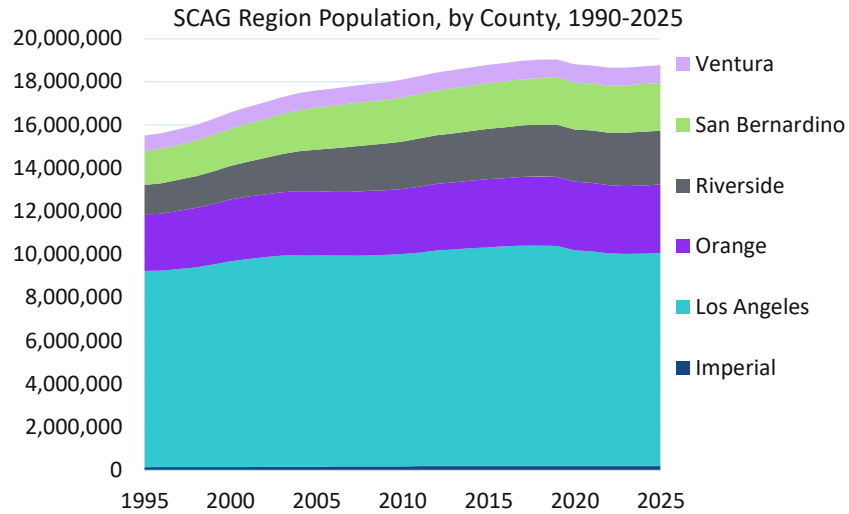
November 2025 TWG Discussion Draft

November 2025

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1

Slide 2

SCAG's Regional Economic-Demographic Forecast Process

Regional Economic-Demographic Forecast Process

2

Population growth has slowed.

SCAG Region Population, by County, 1990-2025

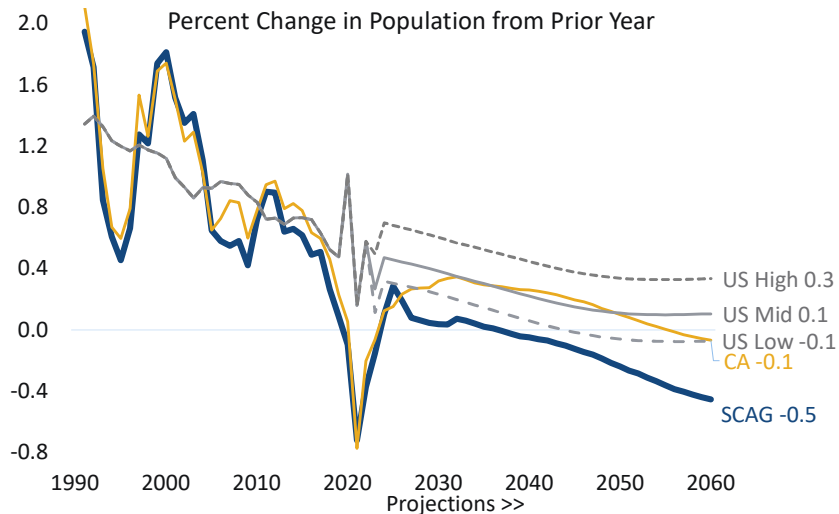Legend: Ventura, San Bernardino, Riverside, Orange, Los Angeles, Imperial

Source: California Department of Finance

PRB 3

3

What will population growth rates be in the future?
CA DOF and U.S. Census Bureau projections show slowing growth.

Percent Change in Population from Prior Year

US High 0.3
US Mid 0.1
US Low -0.1
CA -0.1
SCAG -0.5

Projections >>

Sources: California Department of Finance, U.S. Census Bureau

PRB 4

4

Expert Panel Survey Results: Over the next 30 years what trend do you expect for SCAG region…

…relative to historical SCAG region trends?
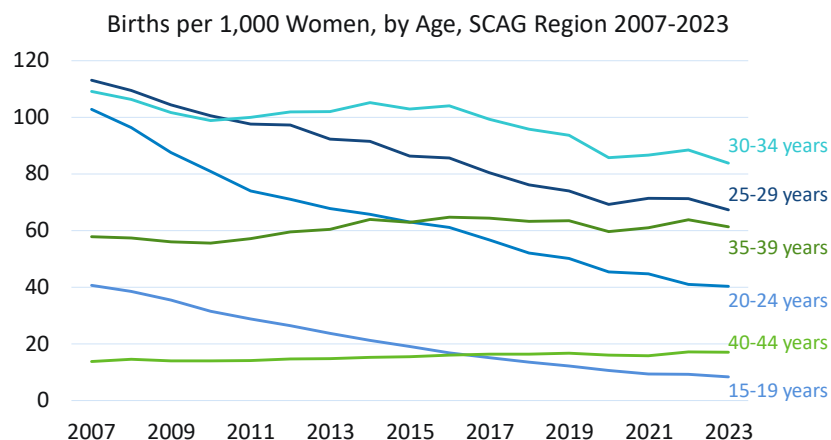
	Slower	Equal/No Change	Faster	?
Population	77	15	8	0

	Slower	Equal/No Change	Faster	?
Households	58	33	8	0

Note: Results rounded to nearest whole number and may not sum to 100%.

PRB 5

5

Birth rates have been falling for younger age groups for more than a decade.

Births per 1,000 Women, by Age, SCAG Region 2007-2023

- 30-34 years
- 25-29 years
- 35-39 years
- 20-24 years
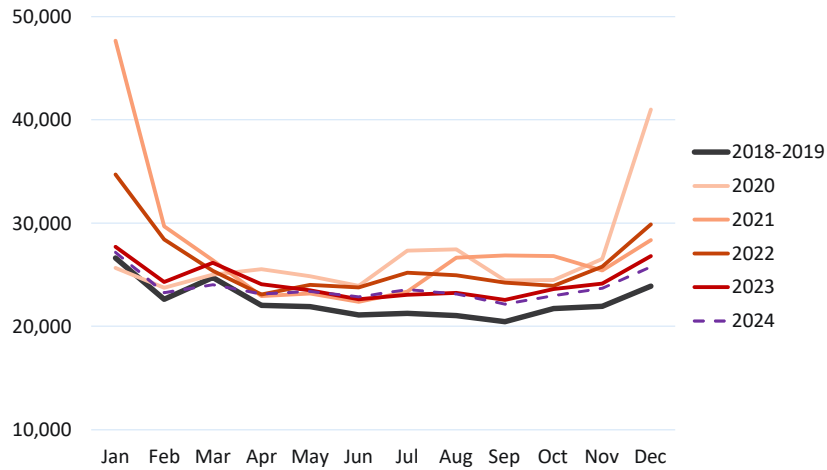- 40-44 years
- 15-19 years

Source: National Center for Health Statistics, U.S. Centers for Disease Control and Prevention

PRB 6

6

Mortality still has not returned to pre-pandemic levels.
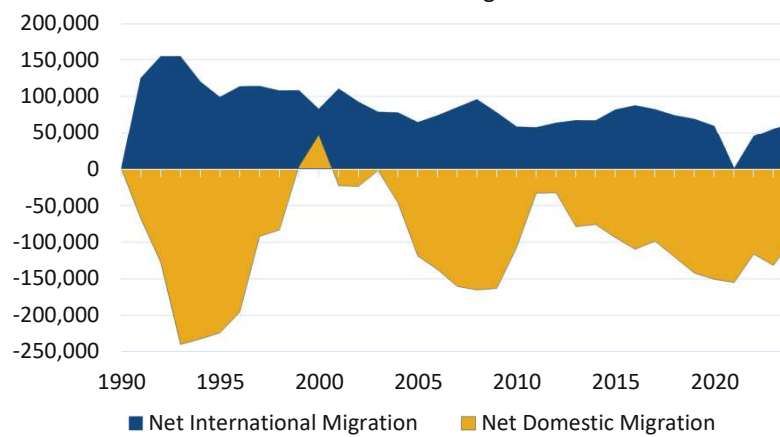
Deaths per Month in California

Source: California Dept. of Public Health

PRB 7

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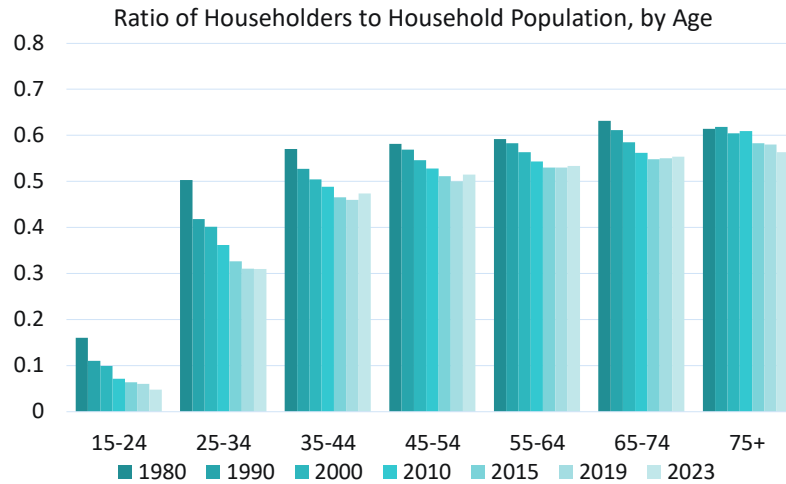## SCAG Region Net Migration: Domestic and International

Number of Net Migrants

Source: California Department of Finance Estimates

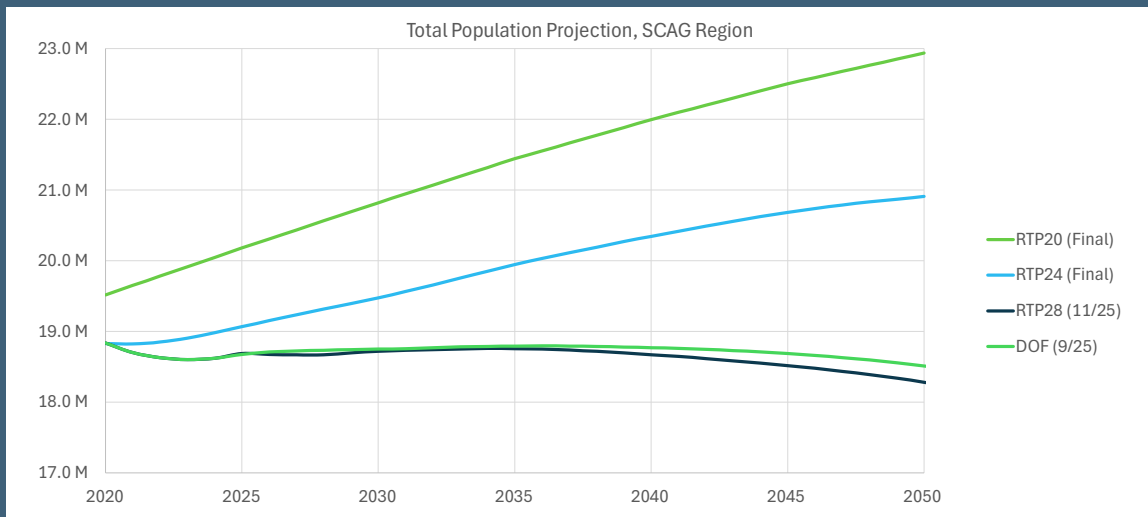PRB 8

8

SCAG Region Household Headship Rates

Ratio of Householders to Household Population, by Age

Legend: 1980 · 1990 · 2000 · 2010 · 2015 · 2019 · 2023

Source: U.S. Census Bureau

PRB 9

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Discussion Draft – Total Population Projection
### *and comparison with DOF and prior SCAG RTP/SCS'*

Total Population Projection, SCAG Region

Legend: RTP20 (Final) · RTP24 (Final) · RTP28 (11/25) · DOF (9/25)

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Discussion Draft – Total Household Projection
and comparison with prior SCAG RTP/SCS'

Total Household Projection, SCAG Region
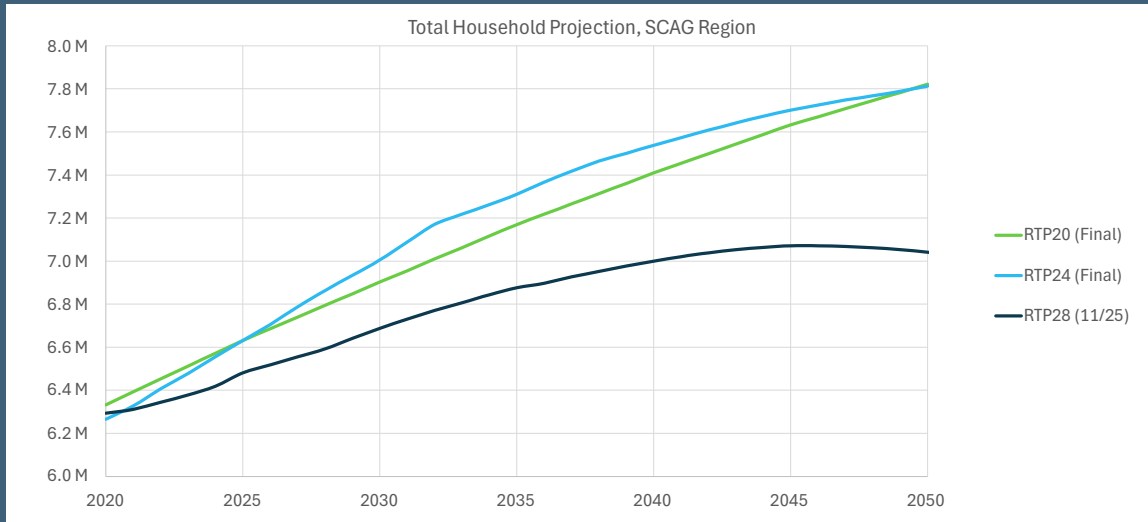
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Discussion Draft – Total Employment Projection
and comparison with prior SCAG RTP/SCS'

Total Employment Projection, SCAG Region
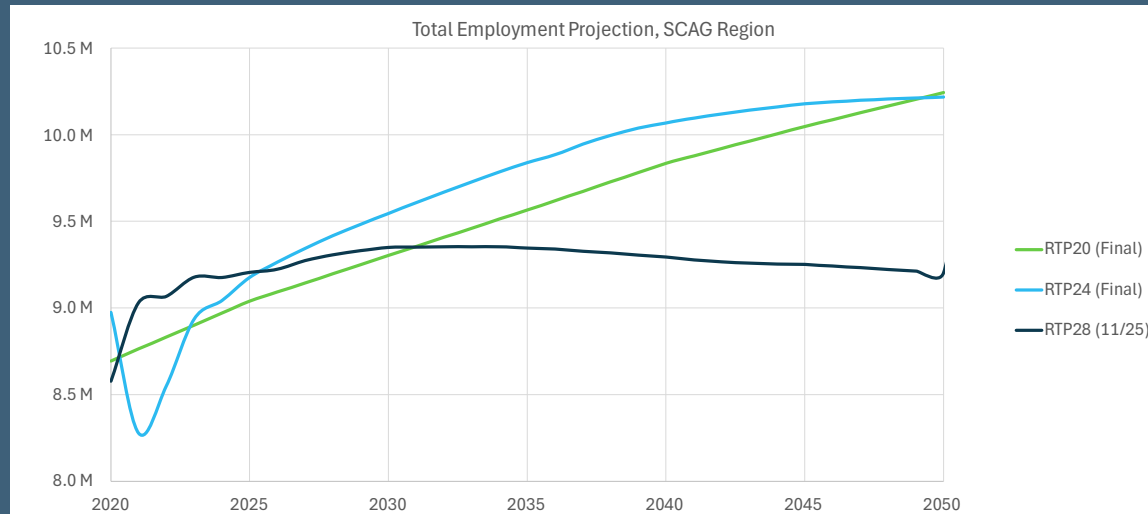
12

Discussion Draft – County Projections
and relationship between population, households, and employment

Total Population (Millions)				Total Employment (Millions)			
	2024	2050	*Pct Change*		2024	2050	*Pct Change*
Imperial	0.2	0.2	*11%*	Imperial	0.1	0.1	*25%*
Los Angeles	9.8	9.3	*-5%*	Los Angeles	5.0	5.0	*-1%*
Orange	3.2	3.2	*1%*	Orange	1.8	1.7	*-4%*
Riverside	2.5	2.6	*7%*	Riverside	0.9	1.1	*13%*
San Bernardino	2.2	2.2	*-1%*	San Bernardino	0.9	1.0	*5%*
Ventura	0.8	0.8	*-7%*	Ventura	0.4	0.3	*-6%*
SCAG	18.6	18.3	*-2%*	SCAG	9.2	9.2	*0%*

Total Households (Millions)				Avg. household size		Pop : Emp Ratio	
	2024	2050	*Pct Change*	2024	2050	2024	2050
Imperial	0.1	0.1	*29%*	3.3	2.8	2.4	2.2
Los Angeles	3.5	3.7	*6%*	2.7	2.4	1.9	1.8
Orange	1.1	1.2	*13%*	2.8	2.5	1.7	1.8
Riverside	0.8	0.9	*18%*	3.1	2.8	2.6	2.5
San Bernardino	0.7	0.8	*14%*	3.2	2.7	2.3	2.2
Ventura	0.3	0.3	*3%*	2.9	2.6	2.2	2.2
SCAG	6.4	7.0	*10%*	2.8	2.5	2.0	1.9

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Next Steps

- Final refinement

- Joint Policy Committee – Spring 2026

- Disaggregation to Jurisdiction and City/Split Tier2 TAZ-level
  - *Methodology forthcoming to TWG*

- Review through Local Data Exchange

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THANK YOU!

For more information, please visit:

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

Celena Mijares, Research Analyst, Population Reference Bureau
cmijares@prb.org
Kevin Kane, PhD, Planning Supervisor, Demographics and Growth Vision
kane@scag.ca.gov

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Connect SoCal 2050
Local Data Exchange (LDX)

Communication and Outreach
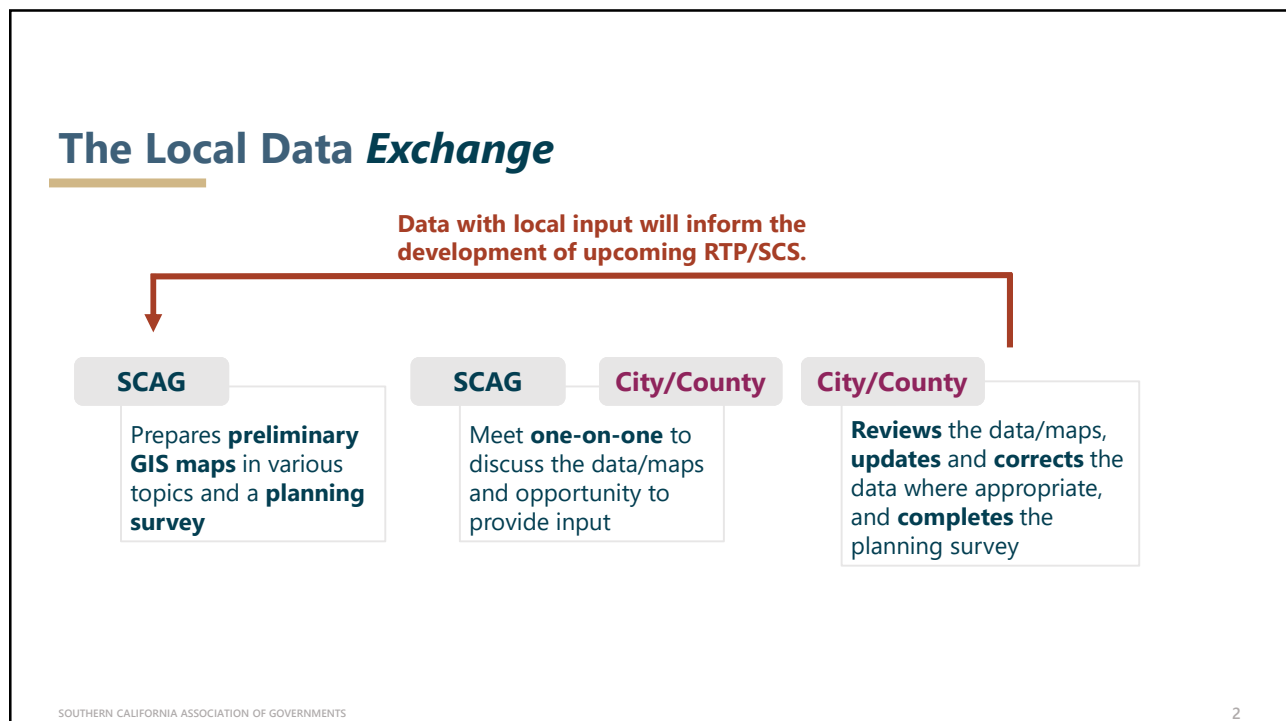
Echo Zheng, PhD
Forecasting & Spatial Analytics, SCAG
November 2025

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1

The Local Data *Exchange*

Data with local input will inform the development of upcoming RTP/SCS.

SCAG	SCAG	City/County	City/County
Prepares **preliminary GIS maps** in various topics and a **planning survey**	Meet **one-on-one** to discuss the data/maps and opportunity to provide input		**Reviews** the data/maps, **updates** and **corrects** the data where appropriate, and **completes** the planning survey

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Proposed Data Changes for Connect SoCal 2050

Update (U)	Reference (R)		Update	Update	Reference
Land Use	**Geographic Boundary**	**Transportation**	**Growth Forecast**	**Priority Development Area**	**Green Region Resource Area**
General Plan land use	City boundary	**Update as data becomes available:** Major transit stops Transit Priority Areas (TPA) High Quality Transit Corridors (HQTC) Regional bikeways Regional truck routes **Add:** Mobility Hubs Dedicated Transit Lanes California Road System	Households 2024-2050 Employment 2024-2050	Exploring a singular-layer approach	Climate Hazards Habitat & Open Space Administrative Areas
Specific Plan land use	Sphere of influence				
Existing land use	Census tract				
Zoning code	TAZ geography				
Residential pipeline projects					

Update data and/or methodology

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Timeline

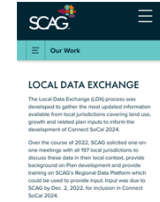| EVENT	ANTICIPATED DATE
Schedule meetings and begin subregion-level outreach	February 2026
Finalize and complete LDX data	March 2026
Launch Local Data Exchange. Data made available for local review through Data/Map Books	March/April 2026
Begin one-on-one meetings with local jurisdictions to review the data package and feedback opportunity	April 2026
Deadline for local jurisdictions to provide feedback for possible inclusion in Connect SoCal	December 2026
Regional collaboration on plan development. Continued development of Connect SoCal strategies with stakeholders, working groups, and the public	2027
Draft RTP/SCS release	Fall 2027
Final RTP/SCS adoption	April 2028

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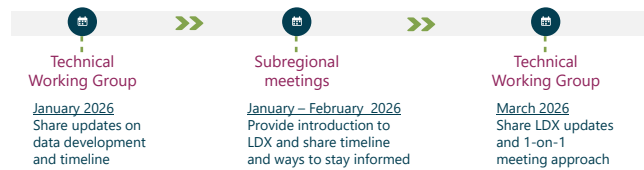
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Communication and Outreach: Goals and Plan

- Inform local jurisdictions about the LDX goal, components, process, and timeline

- Consult on technical approaches for data development (e.g., growth visions)

- Identify points of contact from local jurisdictions

- Facilitate the scheduling of 1-on-1 meetings beginning in April 2026

❑ Webpage update (January 2026): scag.ca.gov/local-data-exchange

❑ "Stay informed" link

❑ Technical working group meetings

❑ Presentations at subregional meetings

Key touch points:

Technical Working Group	Subregional meetings	Technical Working Group
January 2026	January – February 2026	March 2026
Share updates on data development and timeline	Provide introduction to LDX and share timeline and ways to stay informed	Share LDX updates and 1-on-1 meeting approach

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Connect SoCal 2050
Priority Development Areas

November 20, 2025 – Technical Working Group Meeting

Lyle Janicek, Planning Supervisor

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1

Priority Development Areas (PDAs)

- Generally reflect areas in the region where people have access to multiple modes of transportation, certain types of sustainable transportation infrastructure is planned, or that trip origins and destinations are closer together, allowing for shorter trips.

- PDAs are a technical tool to facilitate plan development and analysis and are used for different purposes in the Plan, such as growth visioning, performance measurement or grant applications.

- In Connect SoCal 2024, SCAG's PDAs included: Transit Priority Areas (TPAs), Neighborhood Mobility Areas (NMAs), Livable Corridors, Spheres of Influence

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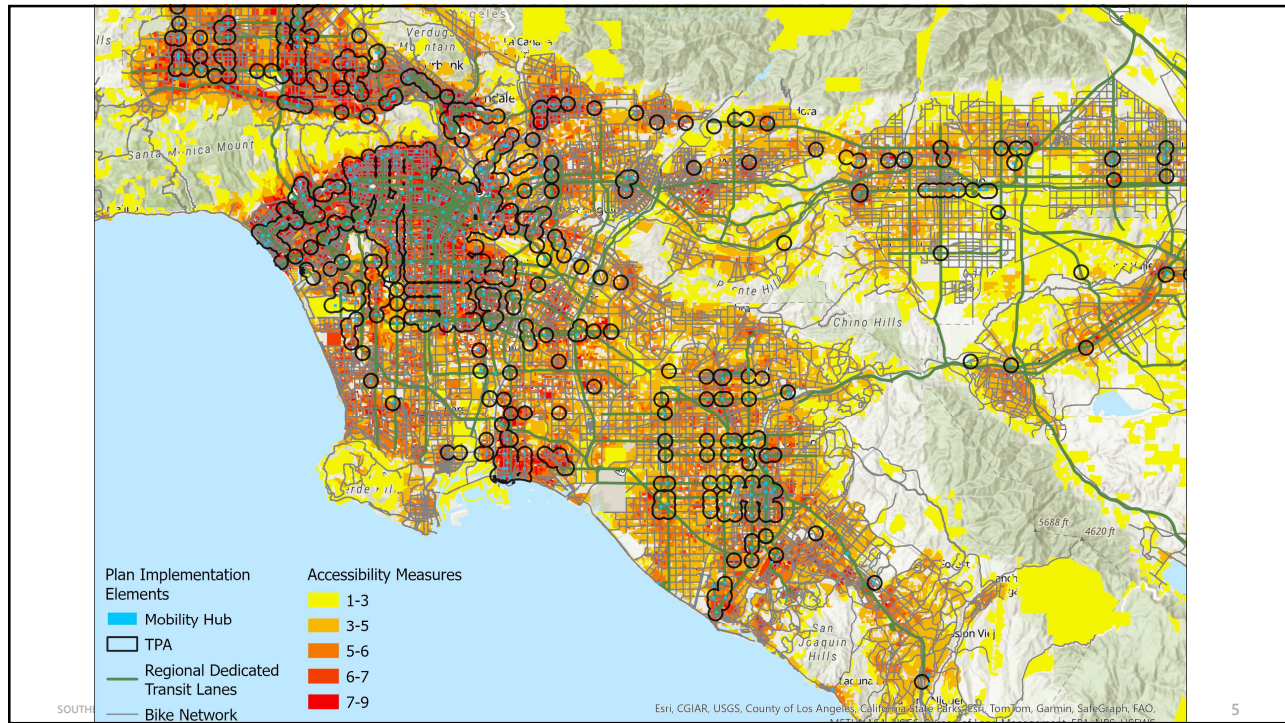
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Considerations for Connect SoCal 2050 PDAs

SCENARIO PLANNING MODEL

Component	Description	Source	Weight
Walkable destinations	Everyday destinations within 15 minutes walking	External/ SPM	TBD
Intersection density	Reflects improved walkability that may not be captured by a time threshold	External/ SPM	TBD
Bikeable destinations	Everyday destinations within 15 minutes on bike	External/ SPM	TBD
Transit access	Regional jobs within 45 minutes during AM peak (2019 base year and 2050 plan year)	Prior Plan/ SPM	TBD
Transit Priority Areas	Major transit stops + ½-mi. buffer	Prior Plan/ Polygon	TBD
Mobility hubs	At least two transportation modes that connect and interact with one another	2025 Study /Point	TBD
Bike network	Regional existing and planned bike network (excluding Class III)	Prior Plan/ Line	TBD
Dedicated transit lanes	Regional dedicated transit lanes network	2023 Study /Line	TBD

- **Components** of priority development that can be assessed individually or as a whole

- A single, smaller geographic scale: Scenario Planning Zones (SPZs)

- Per-capita VMT closely linked to:
  - presence of everyday destinations,
  - their accessibility via multiple modes, and
  - local or regional plan implementation strategies

- Weight components into a single measure → *ArcGIS suitability surface*

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Plan Implementation Elements
- Mobility Hub
- TPA
- Regional Dedicated Transit Lanes
- Bike Network

Accessibility Measures
- 1-3
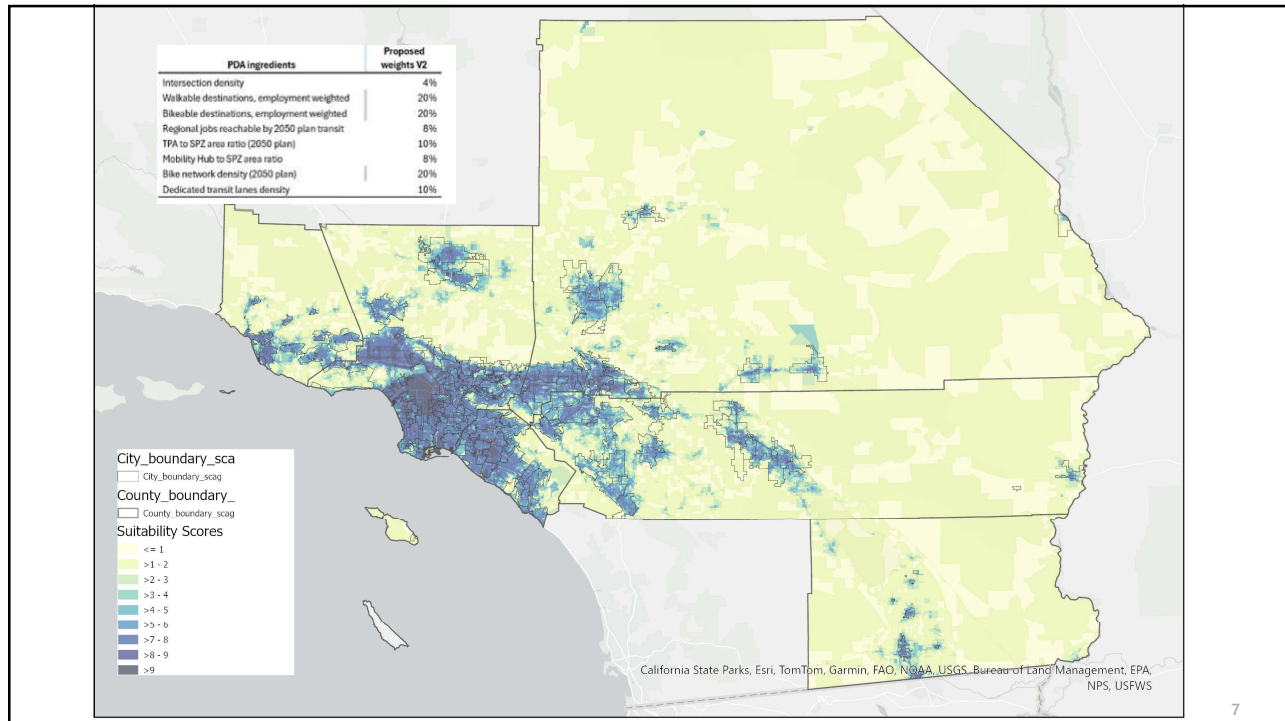- 3-5
- 5-6
- 6-7
- 7-9
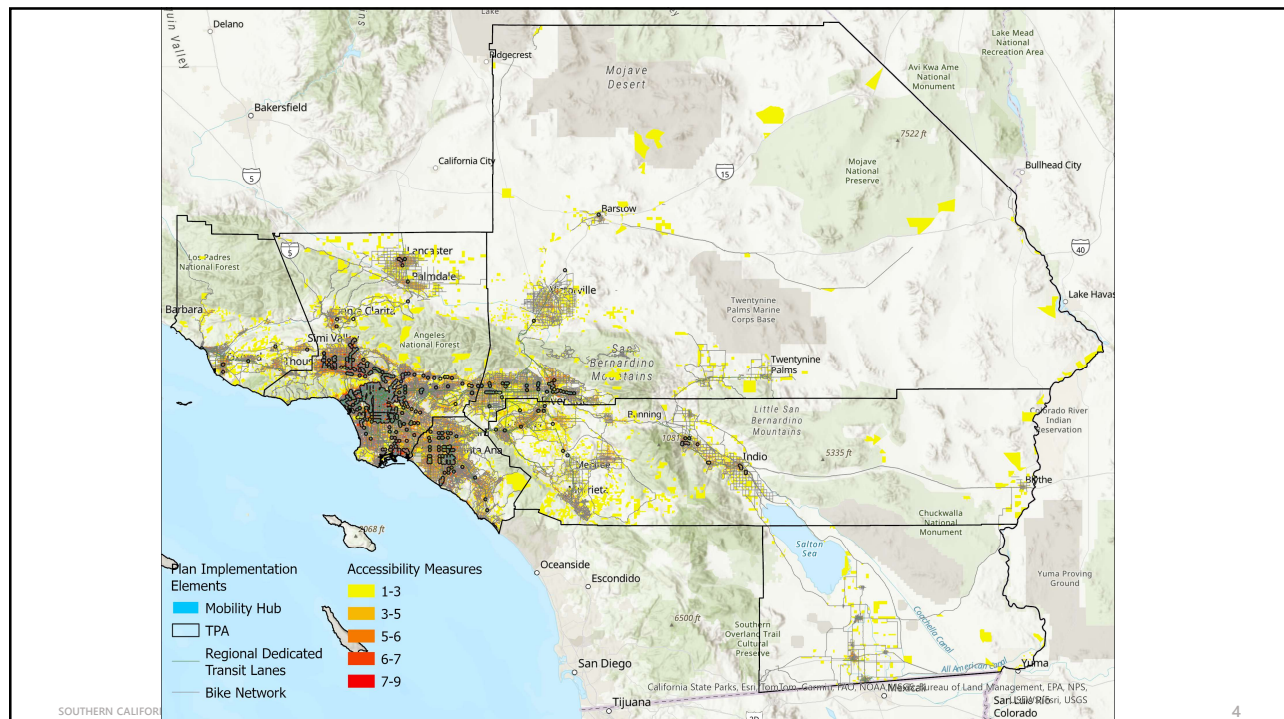
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Growth Visioning

- For Connect SoCal 2050 **growth visioning**, all eight PDA components are mathematically combined with the objective of minimizing the per-capita Vehicle Miles Traveled (VMT) of residents in a PDA.

- Using a regression analysis and an ArcGIS suitability surface, each SPZ in the region receives a *suitability score* of 1-10 to reflect, in general, the degree to which residents in a PDA might be expected to have lower per-capita VMT.

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PDA ingredients	Proposed weights V2
Intersection density	4%
Walkable destinations, employment weighted	20%
Bikeable destinations, employment weighted	20%
Regional jobs reachable by 2050 plan transit	8%
TPA to SPZ area ratio (2050 plan)	10%
Mobility Hub to SPZ area ratio	8%
Bike network density (2050 plan)	20%
Dedicated transit lanes density	10%

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Slide 11
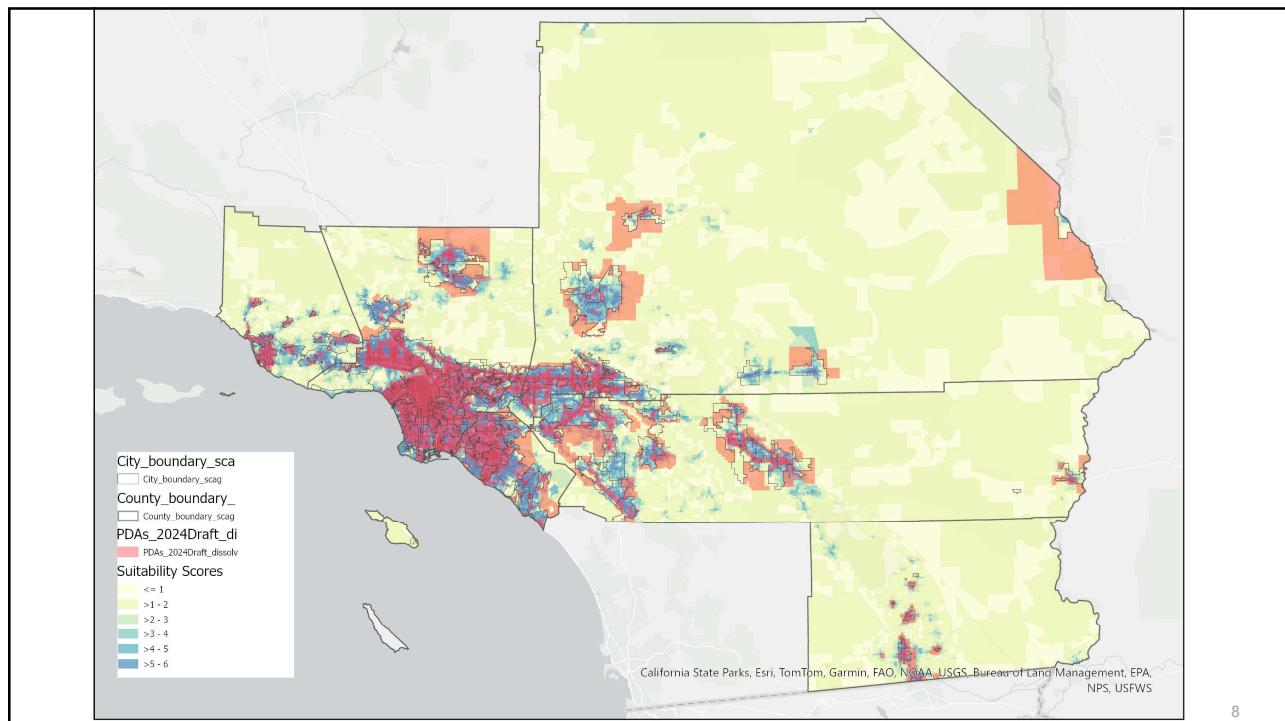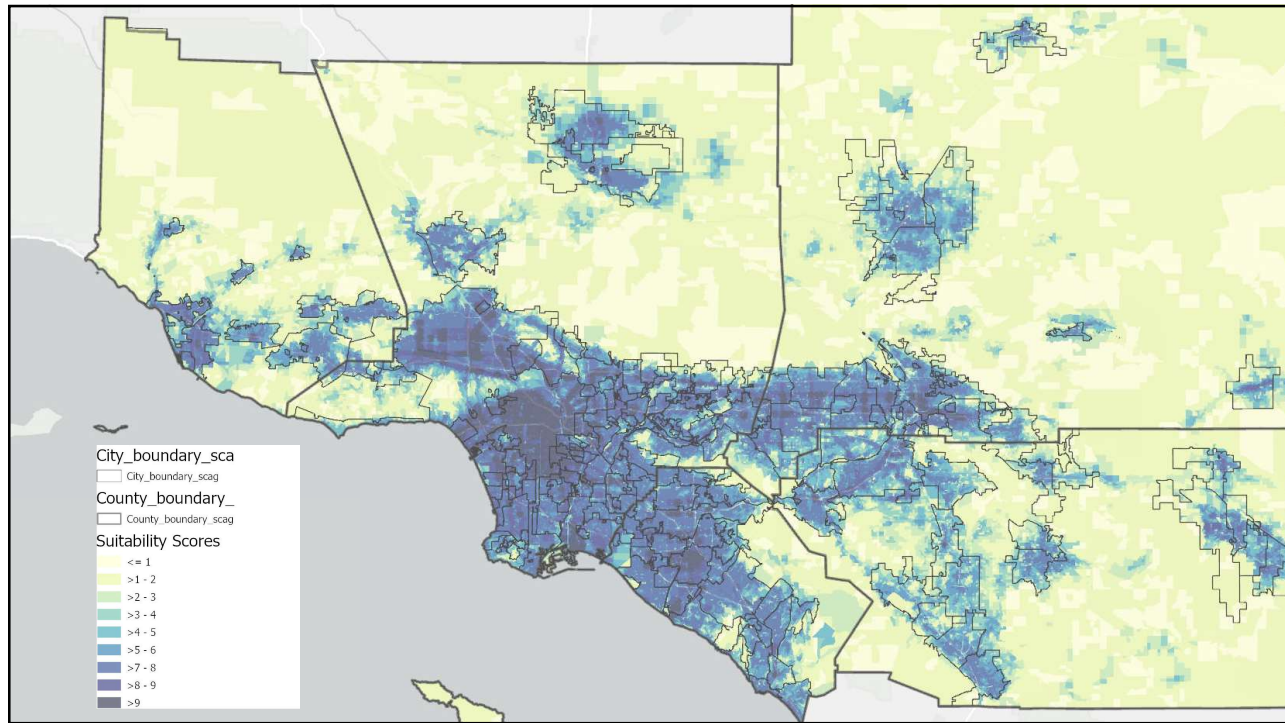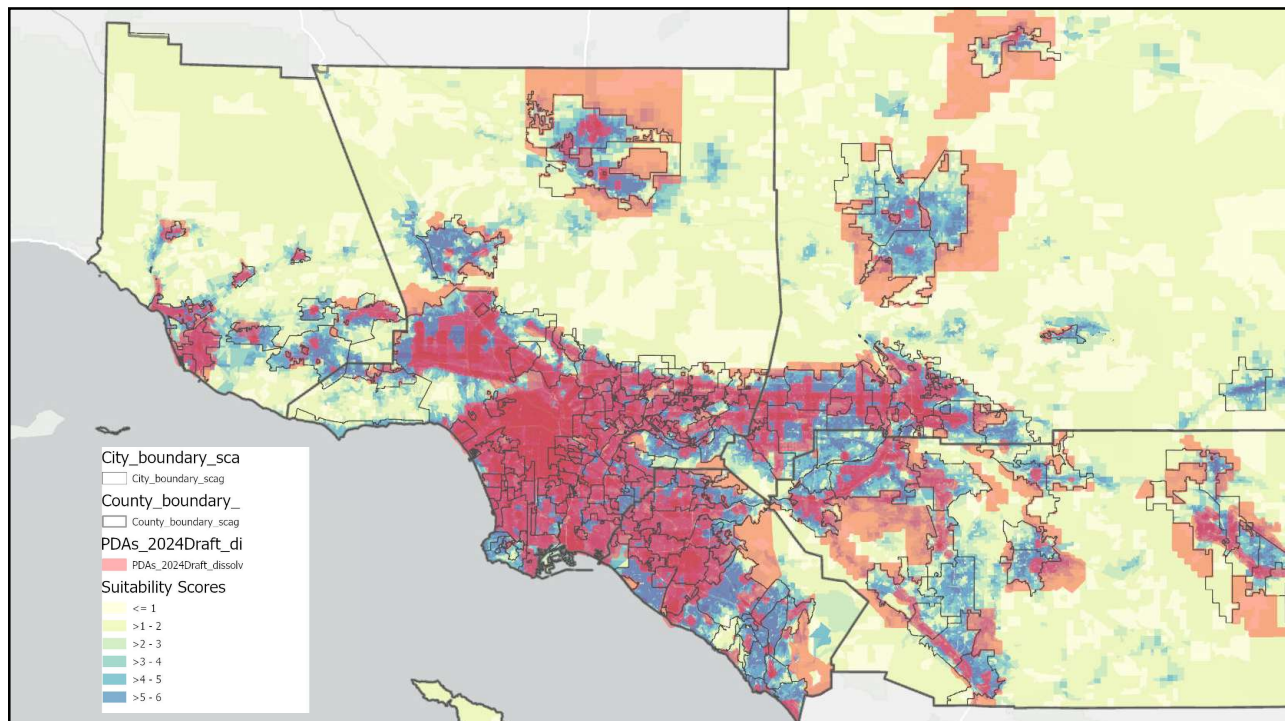
Average Per Capita VMT by Suitability Score

Average per capita VMT by suitability score

	average pc VMT		average pc VMT	% area
<= 1	44.43			
> 1-2	38.37	<= 2	39.37	85.89%
> 2-3	28.93	> 2	22.55	14.11%
> 3-4	27.21	> 3	21.86	10.51%
> 4-5	25.10	> 4	21.42	8.42%
> 5-6	23.37	> 5	20.86	6.64%
> 6-7	21.59	> 6	20.22	4.86%
> 7-8	19.45	> 7	18.13	1.71%
> 8-9	17.04	> 8	16.51	0.72%
> 9	15.19	> 9	15.19	0.19%

SCAG region per capita VMT for Light Duty Vehicles
- 2019: 21.99
- 2050: 19.44

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Slide 12

Table 2. Plan Outcomes for Residential Population in Priority Development Areas

	Land Area	
	Acres	Percent
SCAG Region Total	25,468,372	-
Livable Corridors (LC)	577,236	2.27%
Neighborhood Mobility Areas (NMA)	453,415	1.78%
Transit Priority Areas (TPA)	224,523	0.88%
Spheres of Influence (SOI)*	1,266,803	4.97%
Any Priority Development Areas (PDA)	2,085,438	8.19%
2 or more PDAs and no GRRAs	320,348	1.26%
*0 or only 1 GRRA**	9,040,199	35.50%

Average per capita VMT by suitability score

	average pc VMT		average pc VMT	% area
<= 1	44.43			
> 1-2	38.37	<= 2	39.37	85.89%
> 2-3	28.93	> 2	22.55	14.11%
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> 9	15.19	> 9	15.19	0.19%

SCAG region per capita VMT for Light Duty Vehicles
- 2019: 21.99
- 2050: 19.44

* Reflects areas in SOI only, excluding any areas overlapping with other PDAs (this subset represents 96.5% of the SOI land area). SOIs exist only in the region's 6 county unincorporated areas. Growth totals for the region's 6 county unincorporated areas can be found in Table 13 of the Demographics and Growth Forecast Technical Report.
**Total, unweighted.

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For Discussion

- Suitability scores provide a continuous score that can be adapted to the growth visioning purpose of PDAs

- Do we need to specifically determine whether an SPZ is or isn't a PDA?

- Do we want to establish a cutoff threshold of the suitability score to specifically call out SPZs that are PDAs and those that are not?

- Or should our SPZs be programmed based on a range of suitability for growth purposes?

- For example, breaking the range of 0-9 into sub-ranges
  - 7 or greater = (High Suitability PDA)
  - 3-6.99 = (Moderate Suitability PDA)
  - 0-2.99 = (Low Suitability PDA)

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THANK YOU!

For more information, please visit:

Lyle Janicek, Planning Supervisor – Janicek@scag.ca.gov

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Green Region Resources Areas Data Update for Connect SoCal 2050

Refining Datasets and Scoring Methods

November, 2025
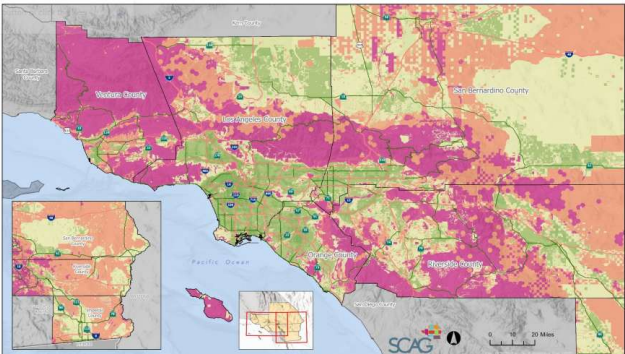
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Objective: Forecasted Regional Development Pattern

"set forth a forecasted development pattern for the region, which, when integrated with the transportation network, and other transportation measures and policies, will reduce the greenhouse gas emissions from automobiles and light trucks to achieve, if there is a feasible way to do so, the greenhouse gas emission reduction targets approved by the state board, and (viii) allow the regional transportation plan to comply with Section 176 of the federal Clean Air Act (42 U.S.C. Sec. 7506)." California Government Code 65080(b)(vii)

Connect SoCal 2024 - Growth Prioritization Scale

"Gather and consider the best practically available scientific information regarding resource areas and farmland in the region" California Government Code 65080(b)(v).

2

Overview

1 Data Update

- Identifying updated version of datasets utilized in the 2024 cycle

- Reviewing updated policy guidance to identify additional datasets to be included in analysis

2 Methodology Update

- Review of Connect SoCal 2024 GRRA methods

- Proposal of new approach for Connect SoCal 2050

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DATA UPDATE

Updating datasets from the 2024 cycle and exploring additional datasets to be included in analysis

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Updated Datasets Required by SB 375

Category	2024 RTP/SCS Dataset	2050 Proposed Update
Open Space and Parks	California Protected Areas Database (CPAD), 2021	CPAD, 2024b
	Save Open Space and Agricultural Resources (SOAR), 2017	SOAR, 2017
	California Conservation Easement Database (CCED), 2021	CCED, 2024
Rare, Threatened, and Endangered Species*	California Natural Diversity Database (CNDDB), 2017	CNDDB, 2019
Sensitive Habitat Areas	Areas of Conservation Emphasis (ACE), 2015	ACE, 2018
	Habitat Essential Connectivity Project, 2010	Essential Habitat Connectivity Vector Data, 2021
	National Wetlands Inventory, 2020	National Wetlands Inventory, California Aquatic Resource Inventory (CARI), 2024
Natural Community and Habitat Conservation Plans	Natural Community Conservation Plan (NCCP) and Habitat Conservation Plan (HCP) boundaries, 2021	NCCP and HCP Reserve Designs, 2025
Farmland	Farmland Mapping and Monitoring Program (FMMP), 2018	FMMP, 2021; Williamson Act Parcels

SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS * CNDDB data is not spatially accurate enough to the parcel level and will be provided to jurisdictions as reference (i.e. not in GRRAs) 5

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Updated Hazard and Climate Risk Datasets

Category	2024 RTP/SCS Dataset	2028 Proposed Update
Flood Areas*	Digital Flood Insurance Rate Map, 2017 (DFIRM)	Digital Flood Insurance Rate Map, 2020 (DFIRM)
Coastal Inundation	CoSMoS for Southern California, v3.0, Phase 2, 2018 (3.3 Feet)	NOAA Office of Coastal Management Sea Level Rise Data, 2025 (3.5 Feet)
Fire Hazard	FHSZ: Local (2008) and State Responsibility Area Maps (2007);	FHSZ: Local Maps (2025) and State Responsibility Area Maps (2024)
	CalFIRE Wildland Urban Interface & Intermix, 2018	CalFIRE Wildland Urban Interface & Intermix, 2018

* Flood Areas are also required for consideration under SB 379

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Recommended Additional Datasets for GRRA Analysis

Fire Risk and Vegetation Management

Cal Fire Priority Landscape: Reduce Wildfire Risk to Forest Ecosystem Services

Cal Fire Priority Landscape: Reduce Wildfire Risk to Communities

Reserve Design and "No Growth" Areas from NCCPs/HCPs

Western Riverside Reserve Design – Conserved Lands + Criteria Cells

Orange County Reserve Design – Central/Coastal NCCP

Orange County Transportation Authority NCCP HCP

Coachella Valley Conservation Areas – CVMSHCP

Biodiversity and Ecosystem Services Datasets

Critical Coastal Areas (CCA)

California Aquatic Resource Inventory (CARI)

South Coast Missing Linkages

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METHODOLOGY UPDATE

Proposed Connect SoCal 2050 Green Region Resource Areas Methodology

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RW1

Connect SoCal 2024 - GRRA Calculation Method

Parcels scored based on the number of overlapping GRRA layers. Those with more overlaps are more sensitive and less desirable for growth.

- **It treats all constraints as equal**, regardless of whether they reflect a legal protection, a hazard risk, or an ecological value
- It relies on the **number of layers** in a topic area, not the topic area itself. Topics with more layers get weighted more.
- It does not distinguish between **temporary risks and permanent restrictions**
  - A parcel subject to periodic wildfire exposure may be scored similarly to one within a permanently protected reserve

Overall, this scoring system provides a multidimensional understanding of areas where development can occur, but may be constrained by various factors.

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Connect SoCal 2024 - GRRA Weighting
Individual Datasets Counted

CLIMATE HAZARDS
- Flood
  - 100 Year
- Fire Hazard
  - Very High/High
  - WUI/Intermix
- Sea Level Rise
  - 3.3 feet

Count = 4
31%

+

HABITAT & OPEN SPACE
- Aquatic
  - Wetlands
- Wildlife Corridors
  - Habitat Connectivity
- Open Space
  - CPAD
  - CCED
  - SOAR
- Habitat Value
  - Areas of Conservation Emphasis

Count = 6
46%

+

ADMIN AREAS
- Farmland & Grazing Land
  - California Farmland Mapping & Monitoring Program (FMMP)
- Tribal Nations
- Military Installations

Count = 3
23%

=

TOTAL COUNT

(ranges from 1 to 13)

Admin Areas 23%
Climate Hazards 31%
Habitat and Open Space 46%

Count = 13
100%

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Connect SoCal 2050 - Proposed GRRA Calculation Model

Proposed changes to the GRRA Calculation Model include:

- Prioritize areas that have **combined climate hazards and habitat value**

- **Group datasets by category** to reduce double counting (instead of counting the datasets themselves)

- **Identify and remove "conserved" areas** that are mostly <u>legally protected </u>from growth:

  - Conservation easements
  - Protected open space areas
  - Military bases

  - Tribal nations
  - HCP/NCCP reserve designs

  - Ventura County Save Open Space and Agricultural Resources (SOAR)

Overall, this scoring simplifies the approach and addresses some limitations of GRRAs in Connect SoCal 2024.

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Connect SoCal 2050 Conserved Areas

- **"Conserved" areas** are mostly <u>legally protected</u> from growth:

  - Conservation Easements
  - Protected Open Space Areas
  - Military Bases
  - Tribal Nations
  - HCP/NCCP Reserve Designs
  - Ventura County Save Open Space and Agricultural Resources (SOAR)

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Connect SoCal 2050 - Proposed GRRA Weighting
Subject Area Categories Counted

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Connect SoCal 2024 Green Region Resource Areas (GRRAs) *Parcel Level*

Note: Conserved areas *are* counted in GRRAs for 2024

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Connect SoCal 2024
Green Region Resource Areas
(GRRAs)
With Conserved Areas

Green Region Resource Areas
Connect SoCal 2024

- 0
- 1
- 2
- 3
- 4
- 5
- 6 - 8
- Conserved Areas

0   20   40
Miles

15

Proposed
Connect SoCal 2050
Green Region Resource Areas
(GRRAs)
With Conserved Areas

Green Region Resource Areas
Proposed Connect SoCal 2050

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- Conserved Areas

0   20   40
Miles

16

Unconserved Parcels by GRRA Area

Unconserved Parcels by GRRA Classification
Connect SoCal 2024

Score	Parcels
0	3,191,567
1	1,224,663
2	133,237
3	185,218
4	19,094
5	1,869
6	44

Unconserved Parcels by GRRA Classification
Draft Connect SoCal 2050

Score	Parcels
0	2,328,980
1	1,953,630
2	390,448
3	74,896
4	7,241
5	434
6	7

97% of parcels are unconserved

* Note – "Conserved" areas have protected status (conservation easements, protected open space, military bases, tribal nations, HCCP/NCP reserve designs, SOAR)

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RW1

Comparison of 2024 GRRAs vs. 2050 GRRAs

- Unconserved areas represent 97% of parcels, and most parcels fall in the "0" or "1" score. Importantly, parcels vary in size substantially across the region.

- 2050 GRRAs have more parcels in mid-level classifications due to:
  - Inclusion of new layers, primarily Moderate Wildfire Hazard Risk Zones in the high desert areas of Los Angeles and San Bernardino Counties

- Some areas for 2050 GRRAs score lower than 2024 GRRAs due to:
  - Removal of conserved areas from scoring
  - Truncation of counting for habitat layers from six to three categories
  - Use of the highest levels of sensitivity for Areas of Conservation Emphasis (ACE)

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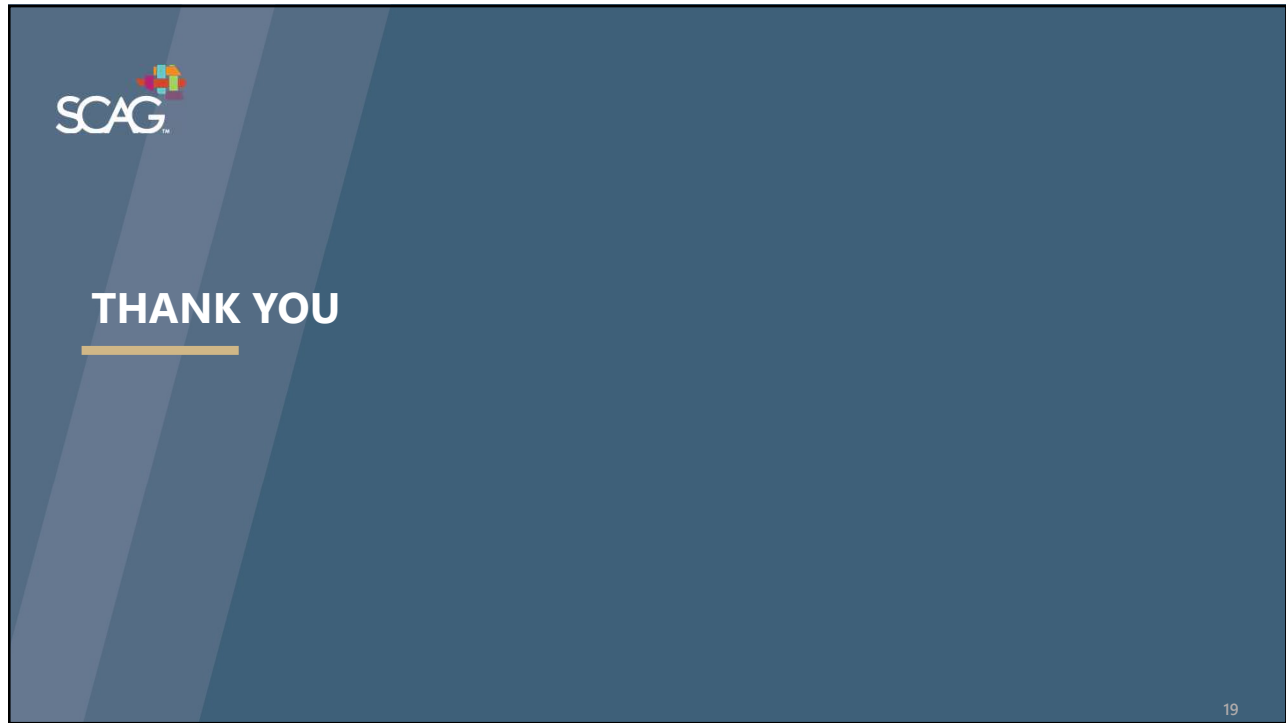
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Public Participation Plan Update

November 20, 2025

SCAG

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Public Participation Plan Update

Public Participation Plan Overview

- A Public Participation Plan (PPP) is a required document for organizations receiving federal funding, which outlines approaches for meeting requirements for public participation, stakeholder engagement, and interagency coordination.

- SCAG's PPP also reviews approaches for meeting state requirements for participation on efforts under state jurisdiction.

- PPPs also act as guidance for staff in planning and implementing stakeholder, public, and interagency participation activities.

- SCAG's PPP was last updated in 2022 ahead of the last Connect SoCal RTP/SCS development cycle.

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2

Public Participation Plan Update

Changes in this Proposed Draft PPP Update

- Coalesces participation approaches into "SCAG's Participation Standards," a methodology for participation in alignment with SCAG's 2024 Strategic Plan:
  - Strategic Priority 2: "Be a cohesive and influential voice for the region."
    - Objective 2.1: "Build a deep understanding of the needs of all our communities and stakeholders to inform our work."
- Participation Standards rooted in strategic priorities, legal requirements, and recognition that meaningful public input leads to better planning outcomes:
  - Representative input
  - Federal and state compliance
  - Communication best practices

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Public Participation Plan Update

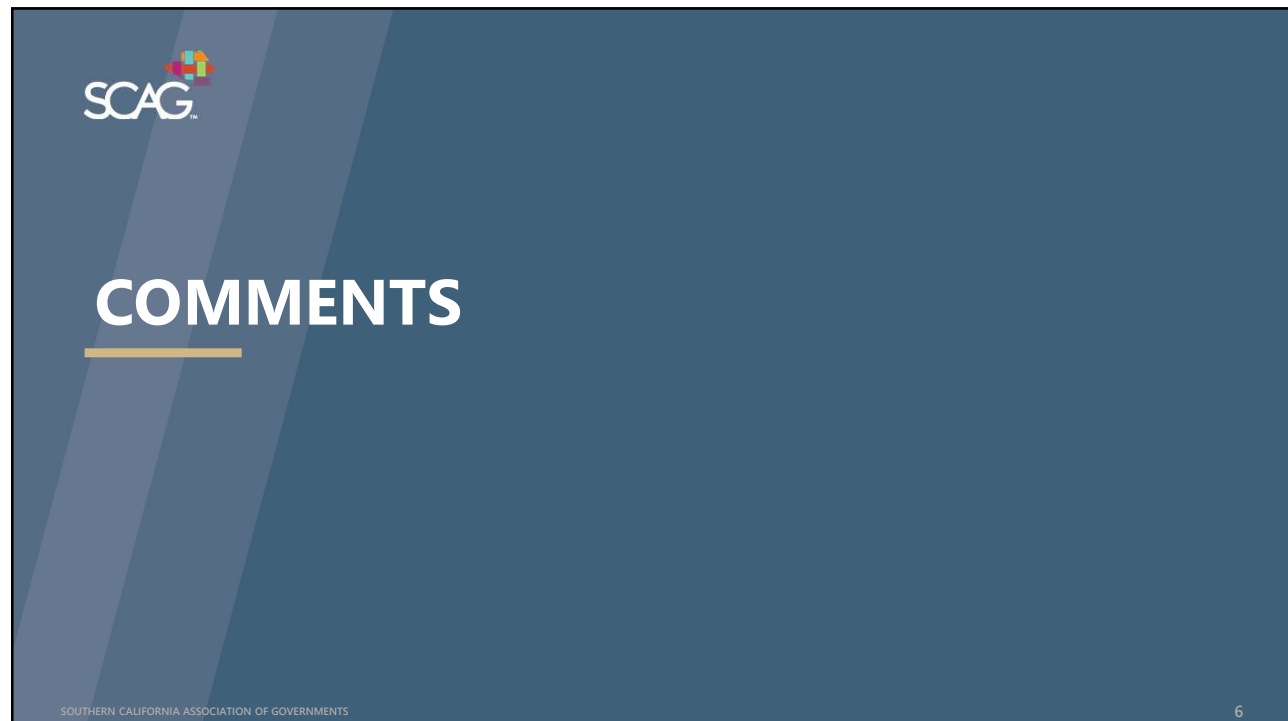# Changes in this Proposed Draft PPP Update

- Creates broad categories of audiences to guide planning and execution of participation work:
  - Public entities
  - Stakeholders
  - General Public
- Organizes participation activities into Participation Tactics Toolbox according to resources and level of effort:
  - Owned tactics
  - Partnership tactics
  - Paid tactics

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Public Participation Plan Update

Process and Next Steps

- LCMC approved draft to be released for public comment in September 2025.

- Draft PPP was posted for public comment for 45 days between September 22 and November 7, 2025.

- Staff receive public comments on Draft PPP at the November 2025 meeting of the Technical Working Group.

- Proposed Final PPP goes before the Executive/Administration Committee and Regional Council in February 2026 for adoption.

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COMMENTS

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LDX Survey for Connect SoCal 2050

Amanda McDaniel, AICP
Forecasting & Spatial Analytics
November 2025

WWW.SCAG.CA.GOV

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Agenda

1 LDX Survey Overview

2 Audience

3 Alignment with LDX Process

4 Process and Next Steps

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What is the LDX Survey?

- Component of the LDX process.

- Collecting feedback from local jurisdictions to refine established Connect SoCal **Sustainable Communities Strategies** (SCS).

- Understanding opportunities and constraints facing local governments in implementing the SCS.

- Version used for Connect SoCal 2024 needs to be updated to capture any new programs or work areas that have emerged since last planning cycle and remove any that are no longer relevant.

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What is the LDX Survey?

- Online (Survey Monkey) submittal + Word document due to length.

- 41 questions across 5 sections:
  - Land Use & Housing (23)
  - Transportation (6)
  - Environmental (5)
  - Public Health & Equity (5)
  - Data (1)

10. Does the most recently adopted general plan update support any of the following Sustainable Communities Strategies (SCS) (See pages 25-32)?

Strategies	N/A	Does Not Support	Supports	Supports and Includes Strategies
Center Focused Placemaking	☐	☐	☐	☐
Focus Growth Near Destinations and Mobility Options	☐	☐	☐	☐
High Quality Transit Areas	☐	☐	☐	☐
Infill	☐	☐	☐	☐
Job Centers	☐	☐	☐	☐
Leverage Technology Innovations	☐	☐	☐	☐
Livable Corridors	☐	☐	☐	☐
Neighborhood Mobility Areas	☐	☐	☐	☐
Priority Growth Areas	☐	☐	☐	☐
Promote Diverse Housing Choices	☐	☐	☐	☐
Promote Green Region	☐	☐	☐	☐
Regional Advance Mitigation	☐	☐	☐	☐
Support Implementation of Sustainability Policies	☐	☐	☐	☐
Transfer of Development Rights	☐	☐	☐	☐
Transit oriented development (TOD)	☐	☐	☐	☐
Transit Priority Areas	☐	☐	☐	☐
Urban Greening	☐	☐	☐	☐
Other [Other]	☐	☐	☐	☐

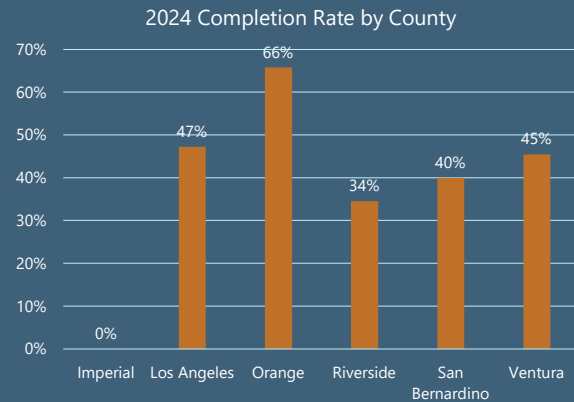What are barriers and/or opportunities to implementing or supporting these strategies?

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Who is the Intended Audience?

- Distributed to all 197 **local jurisdictions** and open during the LDX process.

- Not required, but completion is highly encouraged.

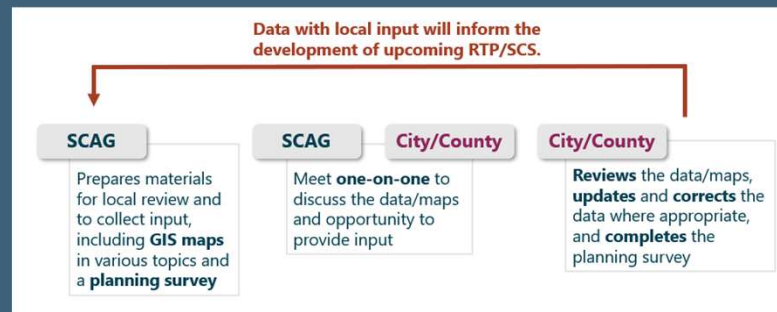- Completed by **90** local jurisdictions (**46%**) for Connect SoCal 2024.

2024 Completion Rate by County

County	Rate
Imperial	0%
Los Angeles	47%
Orange	66%
Riverside	34%
San Bernardino	40%
Ventura	45%

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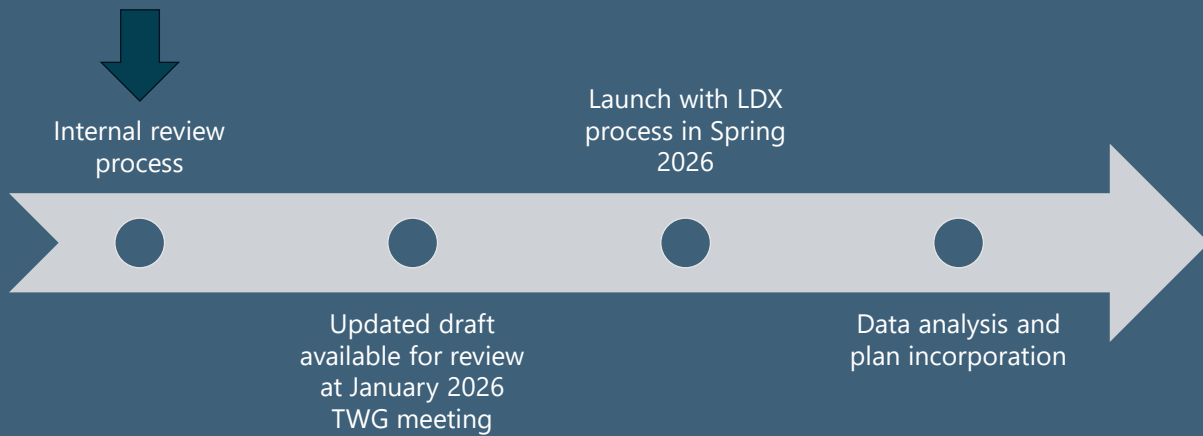## How Does the Survey Align with the LDX Process?

- A component of the larger LDX process.

- Occurs concurrently with one-on-one meeting process, but collects different information that is used in different ways during RTP/SCS development.

Data with local input will inform the development of upcoming RTP/SCS.

SCAG — Prepares materials for local review and to collect input, including **GIS maps** in various topics and a **planning survey**

SCAG **City/County** — Meet **one-on-one** to discuss the data/maps and opportunity to provide input

City/County — **Reviews** the data/maps, **updates** and **corrects** the data where appropriate, and **completes** the planning survey

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Process and Next Steps

Internal review process

Launch with LDX process in Spring 2026

Updated draft available for review at January 2026 TWG meeting

Data analysis and plan incorporation

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THANK YOU

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