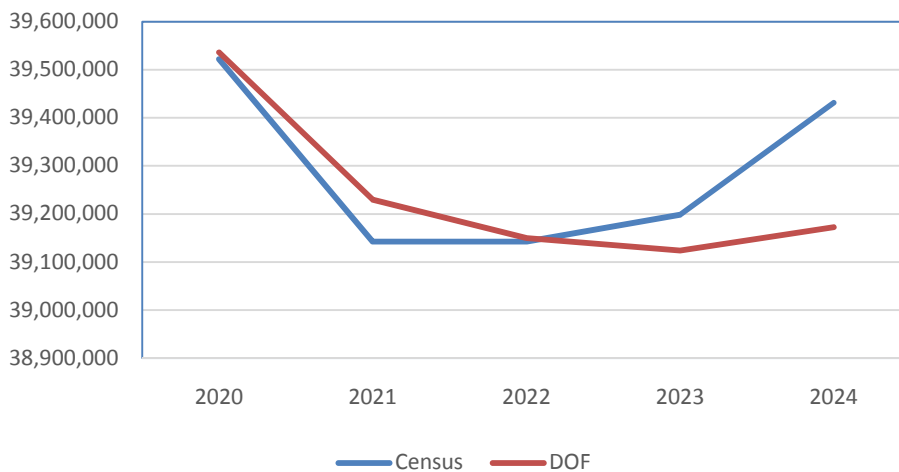


December 2024

## New State and Regional Population Estimates

In December 2024 both the Census Bureau and the California Department of Finance (DOF) issued new population estimates through June 30, 2024. Both sets of estimates show growth in state population for the year ending June 30, 2024, **though the Census Bureau estimates were much higher than those from DOF as shown below.**

### Total Population in California



The Census Bureau estimates show a sharp increase in immigration nationally and in California in the past three years while domestic outmigration decreased slightly but remained high.

#### California Population Components of Change

	2020-21	2021-22	2022-23	2023-24
Natural Increase	67,222	105,352	106,644	110,466
Immigration	44,127	234,953	292,721	361,057
Domestic Migration	-477,586	-336,707	-344,029	-239,575
Net Migration	-433,459	-101,754	-51,308	121,482
Total Change	-379,393	-151	56,279	232,570

Source: Census Bureau

The DOF estimates have much lower immigration levels, but also lower domestic outmigration estimates compared to the Census Bureau. The contribution of natural increase in the estimates is similar between the two sources. The lower DOF immigration estimates are the reason for the lower population estimates.

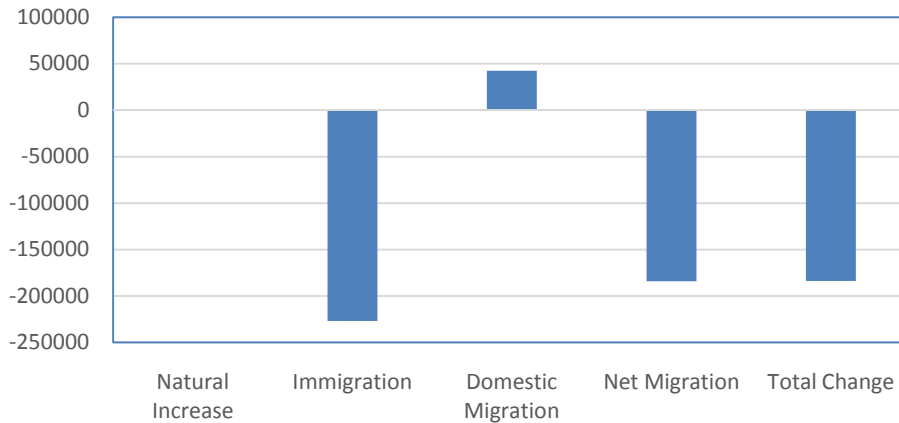
### California Population Components of Change

	2020-21	2021-22	2022-23	2023-24
Natural Increase	67,423	105,524	107,424	111,527
Immigration	-523	90,314	115,936	134,370
Domestic Migration	-373,083	-275,572	-249,308	-197,016
Net Migration	-373,606	-185,258	-133,372	-62,646
Total Change	-306,183	-79,734	-25,948	48,881

Source: DOF

The sources of difference for 2023-24 (the largest gap between the two estimates) are shown below.

### Difference Between DOF and Census 2023-24



The Census Bureau made adjustments to immigration estimates to account for the almost 2.3 million administratively released asylum seekers over the past two years. These would be those who presented themselves at the border, asked for asylum and were given a future court date and the right to work temporarily. This number is only available at the national level, so the Bureau distributed these asylum seekers to the states using a modification of the ACS recent migrant pool method. DOF believes that this method assigned too many of these individuals to California based on analysis of school enrollment and other data. The Bureau has said that it will revisit the methods for the next set of population estimates.

Future population trends will depend on national immigration policies for both legal and unauthorized immigrants (including potential deportations) and on state and regional success in building housing affordable to all income groups. Both sets of policies come with great uncertainty as to success and timing.

## Regional Population Trends

**Regional Population (Thousands)**

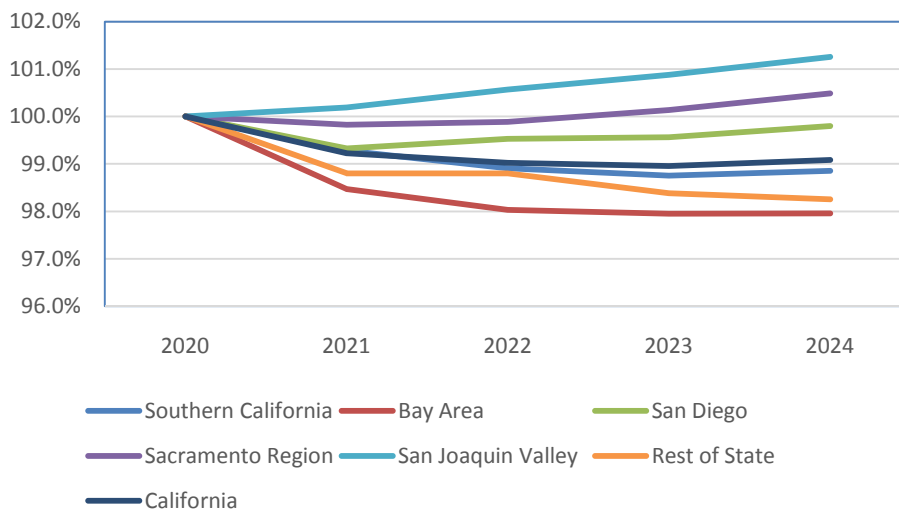
	2020	2021	2022	2023	2024
Southern California	18,837.7	18,701.6	18,631.6	18,602.4	18,621.4
Bay Area	7,747.4	7,628.8	7,594.7	7,588.4	7,589.1
San Diego	3,304.3	3,282.0	3,288.8	3,289.9	3,297.5
Sacramento Region	2,582.8	2,578.3	2,579.9	2,586.3	2,595.4
San Joaquin Valley	4,307.7	4,316.0	4,332.2	4,345.6	4,361.7
Rest of State	2,755.8	2,722.8	2,722.7	2,711.2	2,707.6
California	39,535.7	39,229.5	39,149.8	39,123.9	39,172.7

Source: DOF

**Regional Population Change (Thousands)**

	2020-21	2021-22	2022-23	2023-24
Southern California	-136.0	-70.0	-29.2	19.0
Bay Area	-118.7	-34.0	-6.3	0.7
San Diego	-22.3	6.8	1.1	7.7
Sacramento Region	-4.5	1.6	6.5	9.1
San Joaquin Valley	8.3	16.1	13.4	16.2
Rest of State	-33.0	-0.2	-11.4	-3.6
California	-306.2	-79.7	-25.9	48.9

## Population Compared to 2020



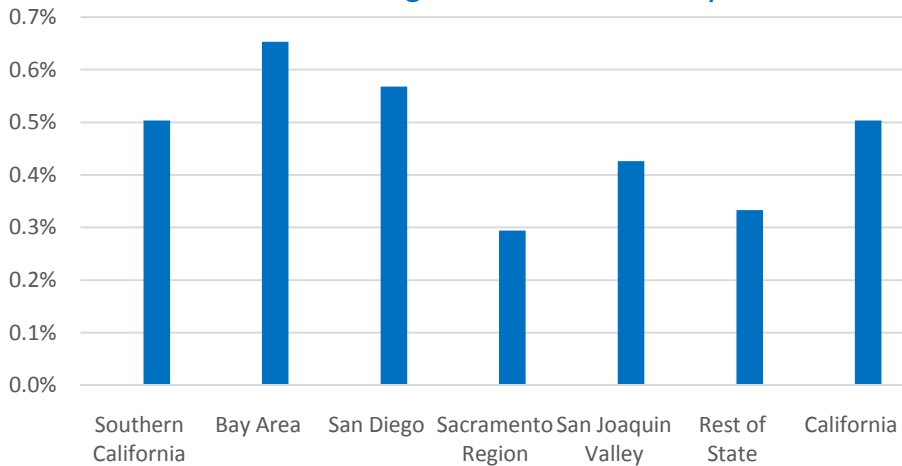
Domestic outmigration continues at a high level in many regions but also has slowly declined over the past three years. Domestic outmigration is largely the result of residents moving to find more affordable housing. However, the recent declines are also the result of workers increasingly being required to live near their work instead of remote work from other states.

### Domestic Migration

	2020-21	2021-22	2022-23	2023-24
Southern California	-154,847	-161,130	-131,874	-93,595
Bay Area	-136,502	-76,861	-53,500	-49,570
San Diego	-31,469	-13,454	-20,883	-18,685
Sacramento Region	-9,092	-9,353	-7,758	-7,611
San Joaquin Valley	-9,957	-11,279	-19,675	-18,518
Rest of State	-31,216	-3,495	-15,618	-9,037
California	-373,083	-275,572	-249,308	-197,016

Outmigration is largest in Southern California, the Bay Area and San Diego. However, when calculated as a % of the regional and state population, it equals just 0.5% of population overall, though slightly higher in Southern California, the Bay Area and San Diego. Still, housing affordability is a major challenge throughout the state. The San Joaquin Valley is the only region where outmigration was higher in 2023-24 than in 2020-21.

### Domestic Out-Migration as % of Population



Immigration level estimates include estimates of immigration into the country and regions and emigration (people leaving to live in another country). As a result in the 2020-21 period, net immigration was slightly negative in some areas. In recent years, net immigration has been positive and increasing though below levels estimated by the Census Bureau.

	<b>Immigration</b>			
	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>
Southern California	607	44,570	55,517	63,120
Bay Area	-582	21,387	28,624	30,850
San Diego	-736	7,651	9,521	13,340
Sacramento Region	125	6,330	8,839	11,660
San Joaquin Valley	1,674	7,643	10,272	11,670
Rest of State	-1,611	2,733	3,163	3,730
California	-523	90,314	115,936	134,370

## Conclusions

Future population trends will depend on trends that are uncertain and for which future policies rather than recent trends will drive the level of growth.

One future trend **is relatively certain**. The contribution to population growth from natural increase will decline as birth rates are expected to remain low and an aging population will produce more deaths over time.

Legal immigration levels will depend on policies but the worker shortages resulting from the continuing decline in labor force growth will create great pressure to increase skill-based immigration, particularly if we look out 5 to 20 years.

The possible level of deportations is a wild card without knowing what if any policies and implementation tools will be adopted.

The one factor that is somewhat in the control of the state and regions is housing affordability and production, which will affect domestic migration trends. In addition, companies and workers will negotiate how much further decline in remote work will occur and how that will affect local populations.

Outmigration levels could continue to decline, especially as rising housing costs and climate events in other states reduce the competitive disadvantage California has been experiencing.

## Notes

### Sources

The Census Bureau estimates and methodology can be viewed in the two links below to the data tables and press release.

- <https://www.census.gov/programs-surveys/popest/data/tables.html>
- <https://www.census.gov/newsroom/press-releases/2024/population-estimates-international-migration.html>

The DOF press release and links to the data tables are shown below. All regional data and resulting tables and charts are based on the DOF estimates cited below.

- [https://dof.ca.gov/wp-content/uploads/sites/352/2024/12/PressRelease\\_July2024-1.pdf](https://dof.ca.gov/wp-content/uploads/sites/352/2024/12/PressRelease_July2024-1.pdf)
- <https://dof.ca.gov/forecasting/demographics/estimates/E-2/>
- <https://dof.ca.gov/forecasting/demographics/estimates/E-6/> This link shows the components of change for each county 2020-2024.

## Regional Structure

The Southern California, Bay Area, San Diego and Sacramento region boundaries match the related regional planning agencies—SCAG, ABAG, SANDAG and SACOG. The San Joaquin Valley region includes multiple regional planning agencies.

### Southern California Counties

Imperial  
Los Angeles  
Orange  
Riverside  
San Bernardino  
Ventura

### Bay Area Counties

Alameda  
Contra Costa  
Marín

Napa  
San Francisco  
San Mateo  
Santa Clara  
Solano  
Sonoma

## **San Diego Region**

San Diego

## **Sacramento Region Counties**

El Dorado  
Placer  
Sacramento  
Sutter  
Yolo  
Yuba

## **San Joaquin Valley Counties**

Fresno  
Kern  
Kings  
Madera  
Merced  
San Joaquin  
Stanislaus  
Tulare