

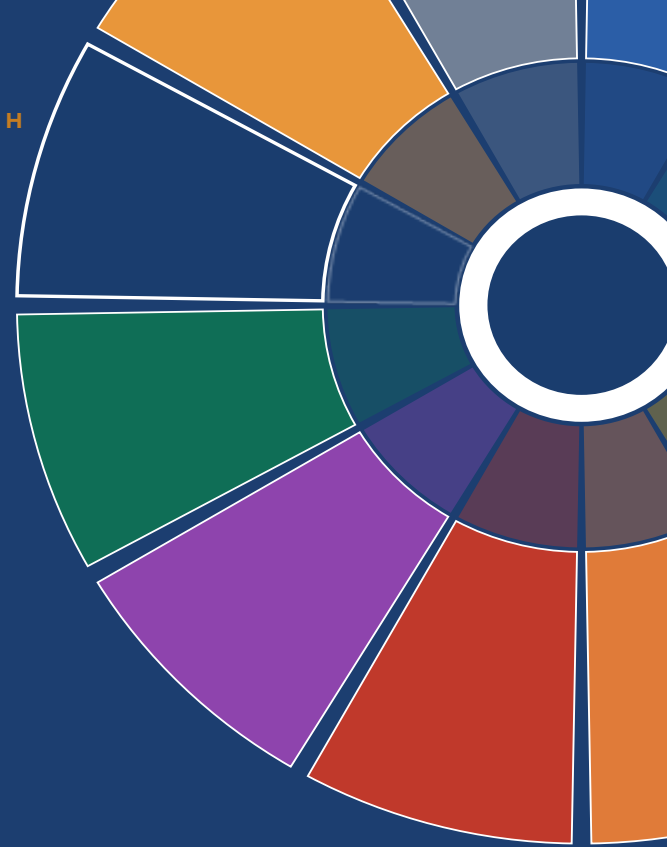
ORANGE COUNTY CENTER OF EXCELLENCE FOR LABOR MARKET RESEARCH

2026 Orange County Labor Market Overview

A Strategic Resource for Workforce and Career Education Planning

Release Webinar · Thursday, May 21, 2026 · 11:30 AM – 12:30 PM

Jesse Crete, Ed.D · Diego Mosquera, MPP · Ashlie Garcia, MS · Jennica Power, Ph.D



FOR LABOR MARKET RESEARCH

ORANGE COUNTY

TODAY'S FOCUS

01

Orange County Profile

Demographics, housing, income & the cost of living reality

02

Economic Forecast

Near-term headwinds and long-term opportunity signals

03

Our Approach

How we selected 243 occupations from 796

04

Sector Comparisons

Growth, wages, demand, supply gaps across 12 sectors

05

Best-and-Better

31 occupations that clear “almost” every bar

06

What This Means for You

Implications for educators and workforce partners

ORANGE COUNTY AT A GLANCE

The region we serve — shaped by scale, diversity, and cost

3.2M

Residents
(8% of California)

3,974

People per sq. mi.
Denser than LA County

\$348B

Gross Regional
Product
(larger than 26 states!)

9.1%

Residents live
in poverty

96.4%

of employers are
small businesses (< 50
employees)

3.8%

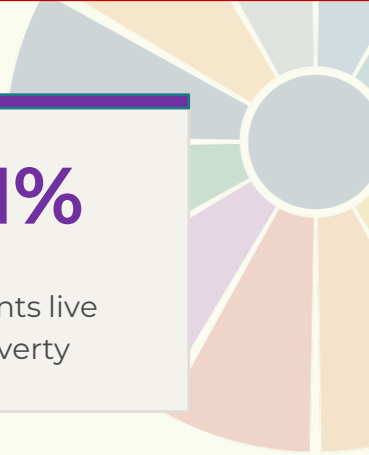
Unemployment rate
(Mar. 2026)

>60%

Adults hold a
bachelor's or higher

\$110k

Median household
income



THE COST OF LIVING REALITY

Why affordability shapes everything we do in education

HOMEOWNERSHIP

3rd least affordable county in California

Entry-level home (1st-time buyer)

\$1.22M

\$241,800/yr income needed

Traditional median home

\$1.43M

\$367,600/yr income needed

RENTING OFFERS NO RELIEF

3-Year Rent Increase

~27%

Fair Market Rent (1-BR)

\$2,454/mo

Hourly wage to avoid cost-burden

\$47.19/hr

Hours at min. wage to afford rent

114 hrs/week

ECONOMIC FORECAST · WHAT'S AHEAD

NEAR-TERM (2025-2027)

Modest, steady growth

Jobs added (2025) ~6,500

Jobs added (2026) ~6,000

Jobs added (2027) ~9,300

Unemployment rate 4.2-4.4%

Annual growth rate ~0.38%

LONG-TERM BRIGHT SPOTS: INNOVATIVE ECONOMY

Decade-long growth sectors

Life Sciences +12.1%

Creative Economy +6.6%

Aerospace & Defense +6.0%

Venture Capital (2025 YTD)

AI & Machine Learning \$2.62B · Robotics & Drones \$2.6B

HOW WE BUILT 2026 LMO



56% of all OC jobs

54% of all annual openings

8 CRITERIA FOR EACH OCCUPATION

SCALE & MOMENTUM

- Job count above median (553+)
- 5-yr growth above median (2.92%+)
- Annual openings above median (55.5+)

WAGE ADEQUACY

- Self-Sufficiency Wage (\$27.13/hr+)
- MIT Living Wage (\$36.53/hr+)

QUALITY SIGNAL

- Recession resilience designation
- U.S. News 100 Best Jobs 2026

LOCAL RELEVANCE

- Location Quotient ≥ 1.0
(more concentrated in OC than nationally)

THE MOST IMPORTANT FINDING:

Our wages haven't kept pace with what it costs to live here.



MIT Living Wage Threshold Rose

+54%

2023: \$23.66 → 2026: \$36.53/hr

Qualifying occupations dropped 51%
(326 → 160)

Self-Sufficiency Wage Rose

+32%

2023: \$20.63 → 2026: \$27.13/hr

Qualifying occupations dropped 25%
(421 → 316)

Automation Index Replaced by LQ

-100

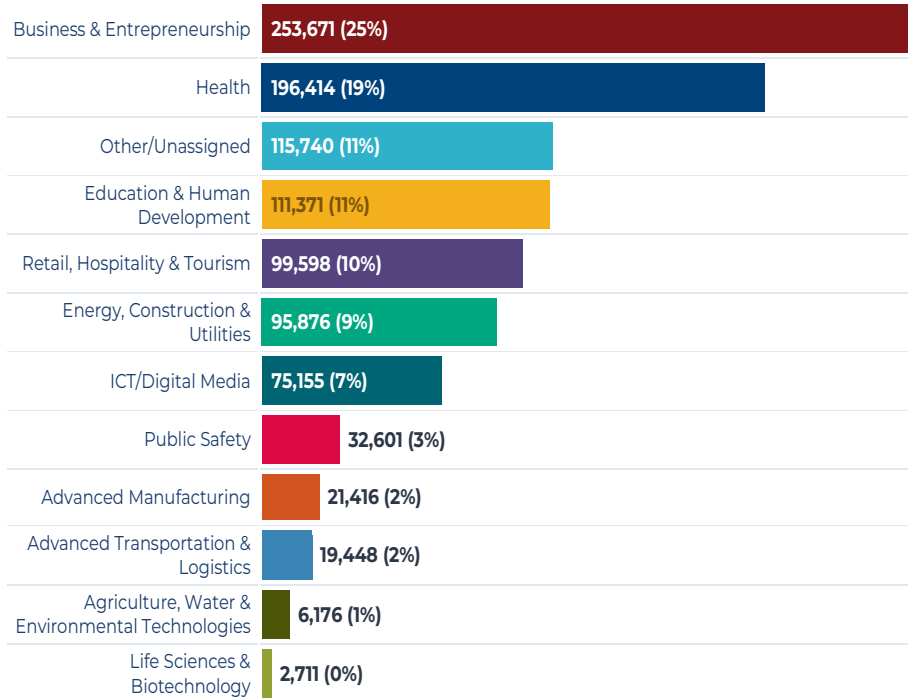
Data availability decision

Qualifying occupations dropped 23%
(438 → 338)

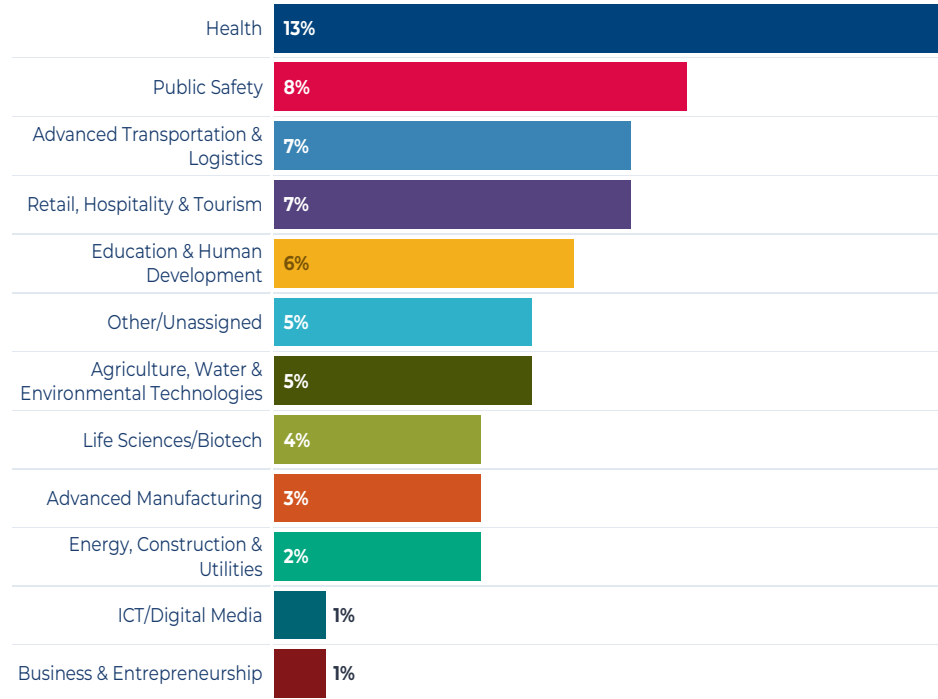
338 qualifying occupations in 2023 → 243 in 2026 (not a weaker labor market — a more demanding standard)

SECTOR OVERVIEW · JOBS & PROJECTED GROWTH

2024 Jobs (243 Occupations)



Projected 5-Year Growth by Sector

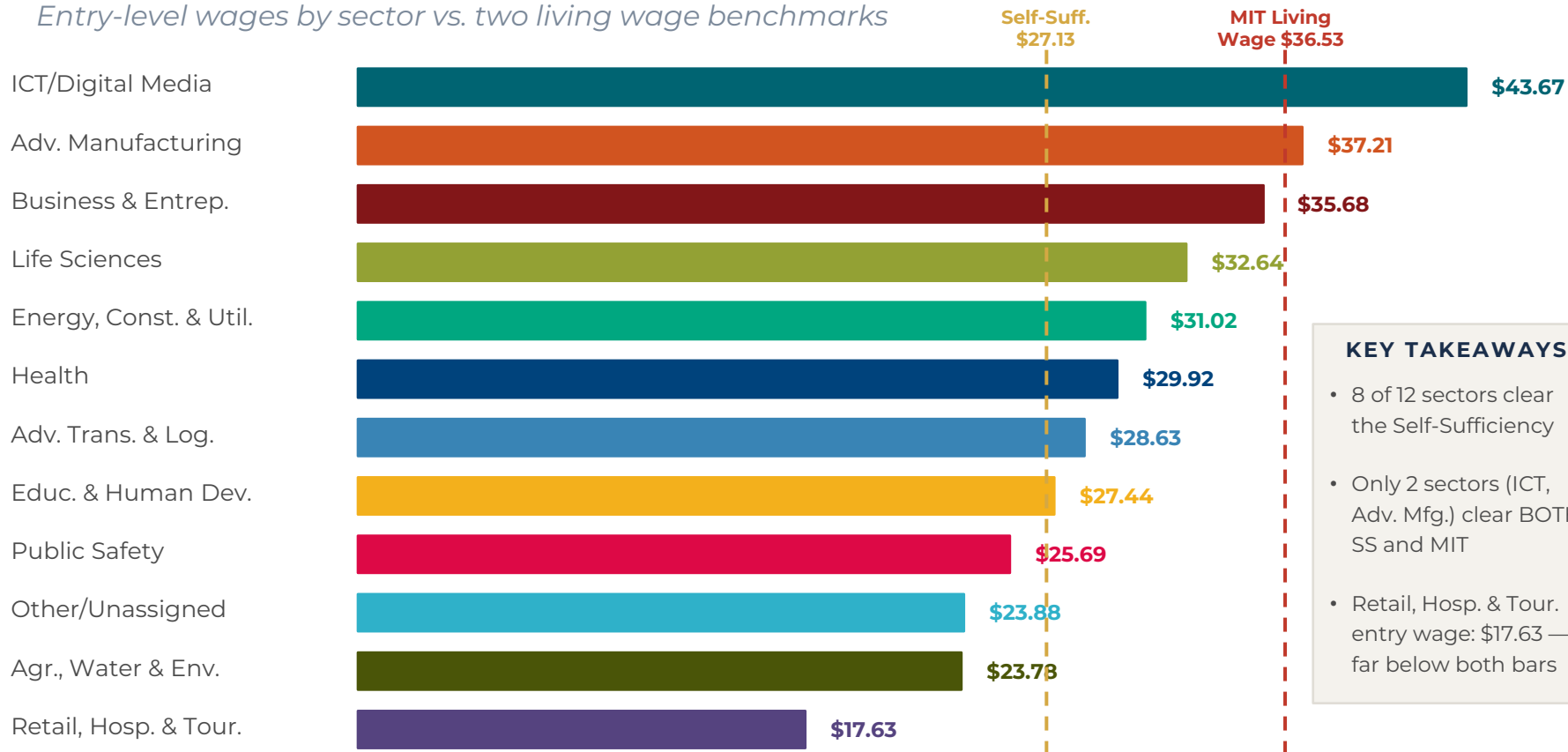


3 largest sectors = 56% of all jobs in LMO

All 12 sectors projected to grow · All outpace 2.92% baseline for all 775 OC occupations

CAN THESE CAREERS SUPPORT A LIFE IN ORANGE COUNTY?

Entry-level wages by sector vs. two living wage benchmarks



KEY TAKEAWAYS

- 8 of 12 sectors clear the Self-Sufficiency
- Only 2 sectors (ICT, Adv. Mfg.) clear BOTH SS and MIT
- Retail, Hosp. & Tour. entry wage: \$17.63 — far below both bars

DEMAND vs. SUPPLY · WHERE ARE THE GAPS?

Annual Openings

117,978

(Demand)

Educational Awards

65,851

(Supply)

Labor Gap

52,127

(Unmet Demand)

9 OF 12 SECTORS HAVE A LABOR GAP · 3 SHOW APPARENT OVERSUPPLY (DRIVEN BY NON-CC AWARDS)

Sector	Openings	Supply	Gap	Note
Retail, Hospitality & Tourism	19,950	431	+19,520	CC-only supply
Health	25,387	11,290	+14,097	Largest gap
Other/Unassigned	16,452	4,475	+11,977	
Education & Human Development	12,133	4,902	+7,231	
Business & Entrepreneurship	20,999	14,101	+6,898	
Energy, Construction & Utilities	8,120	1,735	+6,385	
Public Safety	5,152	1,488	+3,665	CC dominant
Agriculture, Water & Environ. Technologies	776	158	+618	No CC awards
Advanced Manufacturing	1,743	1,182	+561	Non-CC surplus
ICT/Digital Media	4,896	6,073	-1,177	Non-CC surplus
Advanced Transportation & Logistics	2,091	5,375	-3,284	Non-CC surplus
Life Sciences & Biotechnology	278	918	-640	Non-CC surplus

SKILL LEVELS · WHERE DO COMMUNITY COLLEGES FIT?



53% Above Middle-Skill

35% Middle-Skill

12% Below Middle-Skill

Above Middle-Skill
130 occupations (53%)

Middle-Skill
85 occupations (35%)

Below Middle-Skill
28 occupations (12%)

SECTORS MOST ALIGNED WITH CC PATHWAYS (Middle-Skill majority)

77%

Adv. Transportation & Logistics

73%

Public Safety

63%

Energy, Construction & Utilities

60%

Life Sciences & Biotechnology

85 middle-skill occupations = CC program opportunity · These are the careers your students can reach without a 4-year degree

BEST-OF-THE-BEST

31 Occupations That Cleared “Almost” Every Bar

9%
of all OC
employment

4%
5-yr projected
growth

SCALE & MOMENTUM

2,612 openings

Highest avg. annual openings: *General & Operations Managers* (Middle-skill)

WAGE ADEQUACY

28 of 31

Exceed MIT Living Wage (\$36.53) · *CIS Managers*[^] have the highest entry-level hourly wage (\$73.01)

SCALE & MOMENTUM

1,573 openings

2nd highest avg. annual openings: *Registered Nurses* (Middle-skill)

QUALITY SIGNAL

29 of 31

Recession resilient · 2 exceptions: *Respiratory Therapists & Dietitians and Nutritionists*[^]

SCALE & MOMENTUM

+29%

Strongest 5-year job growth: *Nurse Practitioners*[^] · Lowest LQ in group (LQ 0.5)

QUALITY SIGNAL

29 of 31

On U.S. News Best Jobs 2026 · 2 exceptions: *Facilities Managers and Clinical & Counseling Psychologists*[^]

WAGE ADEQUACY

\$28–\$73 /hr

Entry-level wage range · *Dental Hygienists* (\$28.22) → *CIS Managers*[^] (\$73.01) · All 31 exceed Self-Sufficiency Standard

LOCAL RELEVANCE

18 of 31

High concentration in OC (LQ ≥ 1.0) · Avg. LQ of 1.0 across all 31, led by *Sales Managers*[^] (LQ 1.7) and *Civil Engineers*[^] (LQ 1.6)

\$47.07
Weighted avg
entry-level wage

SECTORS REPRESENTED ACROSS BEST-OF-THE-BEST OCCUPATIONS

6 of 12 sectors

Health leads with 14 occupations (45%) · **Business & Entrepreneurship** follows with 8 (26%) · Only 3 sectors account for all 7 middle-skill Best-of-the-Best occupations: **Health** (4), **Business & Entrepreneurship** (2), and **ICT/Digital Media** (1)

BEST-OF-THE-BEST

★ 5 perfect scores (8/8 points):

Occupation	2024 Jobs	5-Yr Growth	Openings/yr	Entry Wage	LQ	Sector
★ Financial Managers	11,083	3%	818	\$60.33	1.2	Business & Entrep.
★ Lawyers	12,714	4%	567	\$51.75	1.3	Other/Unassigned
★ CIS Managers	7,516	4%	539	\$73.01	1.1	ICT/Digital Media
★ Data Scientists	2,982	11%	233	\$38.67	1.2	ICT/Digital Media
★ Dentists, General	1,879	4%	70	\$61.37	1.3	Health



BESTish-OF-THE-BEST · 7-POINT OCCUPATIONS (26 of 31)

Occupation	2024 Jobs	5-Yr Growth	Openings/yr	Entry Wage	LQ	Sector
General & Operations Managers	30,843	3%	2,612	\$40.33	0.77	Business & Entrep.
Registered Nurses	25,346	6%	1,573	\$51.69	0.70	Health
Project Mgmt. Specialists	13,051	1%	921	\$38.17	1.17	Business & Entrep.
Sales Managers	11,527	-2%	833	\$40.62	1.73	Business & Entrep.
Construction Managers	6,120	3%	494	\$37.86	0.97	Energy, Const. & Util.
Civil Engineers	6,507	0%	388	\$39.72	1.57	Energy, Const. & Util.
Chief Executives	4,664	1%	320	\$52.22	1.44	Business & Entrep.
Social & Community Svc. Managers	3,030	10%	298	\$30.33	1.29	Business & Entrep.
Industrial Engineers	3,246	6%	234	\$45.68	0.87	Adv. Manufacturing
Dental Hygienists	2,727	8%	210	\$28.22	1.13	Health
HR Managers	2,667	1%	207	\$58.04	1.09	Business & Entrep.
Nurse Practitioners	1,848	29%	196	\$67.25	0.54	Health
Electrical Engineers	2,867	1%	159	\$49.41	1.39	Adv. Manufacturing
Facilities Managers	1,650	4%	150	\$38.23	1.05	Business & Entrep.

Orange bar = middle-skill occupation · highlighted = criterion not met (if no highlight then it missed with the Resilient Job or USNWR metric)

BEST-OF-THE-BEST · 7-POINT OCCUPATIONS (cont.)

Occupation	2024 Jobs	5-Yr Growth	Openings/yr	Entry Wage	LQ	Sector
Pharmacists	3,153	3%	138	\$62.17	0.89	Health
Radiologic Technologists & Techs.	1,730	6%	110	\$38.00	0.71	Health
Information Security Analysts	1,479	10%	110	\$45.72	0.70	ICT/Digital Media
Physical Therapists	2,380	4%	109	\$45.94	0.83	Health
Physician Assistants	1,331	14%	106	\$61.13	0.76	Health
Clinical & Counseling Psychologists	1,099	21%	104	\$37.23	1.21	Health
Respiratory Therapists	1,673	5%	101	\$45.05	1.13	Health
Speech-Language Pathologists	1,337	10%	101	\$39.85	0.65	Health
Psychologists, All Other	1,103	11%	99	\$32.74	1.27	Health
Computer Network Architects	1,569	3%	88	\$53.65	0.81	ICT/Digital Media
Occupational Therapists	1,249	8%	81	\$46.87	0.73	Health
Dietitians and Nutritionists	945	11%	81	\$37.05	1.03	Health

Orange bar = middle-skill occupation · highlighted = criterion not met (if no highlight then it missed with the Resilient Job or USNWR metric)

WHAT THIS MEANS FOR YOU · EDUCATORS & WORKFORCE PARTNERS

01

Wage is the filter, not growth

Many growing occupations don't pay enough for students to live here. When advising students, lead with wage benchmarks. An OC job that doesn't clear \$36.53/hr (MIT living wage) needs to be part of a career pathway that does.

03

Health is the dominant opportunity — but the gap is huge

Health leads in jobs, growth, and openings — with a labor gap. CC programs produce only 1,872 of 11,290 total awards. There's significant room to expand enrollment and credential production in this sector.

05

Agriculture & Environmental Technology = an untapped CC opportunity

There's a labor gap of 618 positions, two veterinary-related middle-skill occupations accounting for 440 openings annually — and zero CC awards in this analysis. This is a direct signal for program development.

02

CC programs are uniquely positioned

85 middle-skill occupations — Registered Nurses, Dental Hygienists, Radiologic Techs, General & Operations Managers, Respiratory Therapists and more — are reachable through CC pathways.

04

Look beyond the oversupply headline

ICT, Adv. Trans. & Logistics, and Life Sciences appear oversupplied — but that's driven by 4-year degrees. CC programs in these sectors remain underrepresented. The 'oversupply' isn't ours.

06

Build the regional pipeline together

The 65,851-position labor gap is too large for any single institution to close. Closing it requires connected pipelines: dual enrollment and articulation between K-12/ROP and CCs, co-investment from workforce development boards, and aligned program priorities across partners. This report gives everyone in this room a common data foundation to plan from — together.

THANK YOU

Let's Connect

Full Report + Data Appendix

<https://bit.ly/2026OCLMO>

Presentation Deck

<https://bit.ly/2026OCLMO-deck>



Jesse Crete, Ed.D.
Regional Director
crete_jesse@rscdd.edu



Ashlie Garcia
Research Analyst
garcia_ashlie@rscdd.edu



Jennica Power, Ph.D.
Research Analyst
power_jennica@rscdd.edu



Diego Mosquera
Interim Research
Coordinator
mosquera_diego@rscdd.edu



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