

Taxable Transactions in Orange County

INTRODUCTION

Taxable transactions are of vital importance to the economy of Orange County for a number of reasons. First, taxable transactions directly create and sustain jobs. There is wealth in the sale of goods and products. Today in Orange County, there are 231,400 jobs in the retail sector alone. In addition, many jobs in the construction and service sectors also involve taxable transactions. Second, the sale of consumer goods and products supports jobs in the wholesale trade and manufacturing sectors. Employment in the wholesale trade sector in Orange County stands at 102,000 and in the manufacturing sector at 231,300. Finally, sales tax revenues are a major source of revenue for municipal governments. Many of the essential services provided to Orange County residents could not be provided at their current levels or not at all without this important source of revenue.

This *Orange County Profiles* will focus on taxable transactions in Orange County during the period of 1989 through 1998. This period of time represents the most current ten years of data made available by the California State Franchise Tax Board. Aside from the availability of the data, this time period is also very interesting and dynamic. On one hand, this is an era that has been marked by the most severe economic downturn in the region since the Great Depression. On the other hand, this period has been marked by the longest period of economic growth in over fifty years. There has also been major changes in the retail sales industry. The retail industry, like other sectors, has also been subject to takeovers. Food, department and drug store chains that were commonplace ten years ago no longer exist. The "big box" retail outlets have also become major players in the retail sector. The "big box" store has brought together a very broad array of goods under one roof such as furniture, appli-

ances, office supplies, food, soft drinks, alcoholic beverages, clothing, books, over the counter drugs, beauty items, and garden supplies which are sold at discount prices and frequently in bulk. Gas stations have also become convenience stores. Not only can you gas up at the station, but you can purchase milk and bread. In addition, there is "E-Commerce." All evidence suggests that consumers are turning to "E-Commerce" in growing numbers. Its impact on traditional retail establishments is unknown, but it seems to be extremely successful in certain markets such as books.

TAXABLE TRANSACTIONS

Taxable transactions in Orange County totaled \$37.1 billion during 1998, an increase of nearly \$10 billion or 35.3% over 1989 (See Table 1). However, the trend during this ten year period was not always upward. There was an absolute decline between 1990 and 1991, and real declines through 1992 and 1993 when adjusting for inflation. There are some important trends revealed when looking at the transactions by category. When interpreting this data it is important to note that the categories reflect the primary goods or products. A service stations primary item is gasoline, but it may also sell food and beverages. The sale of taxable food and beverages is included in the total taxable transactions.

CDR HAS MOVED

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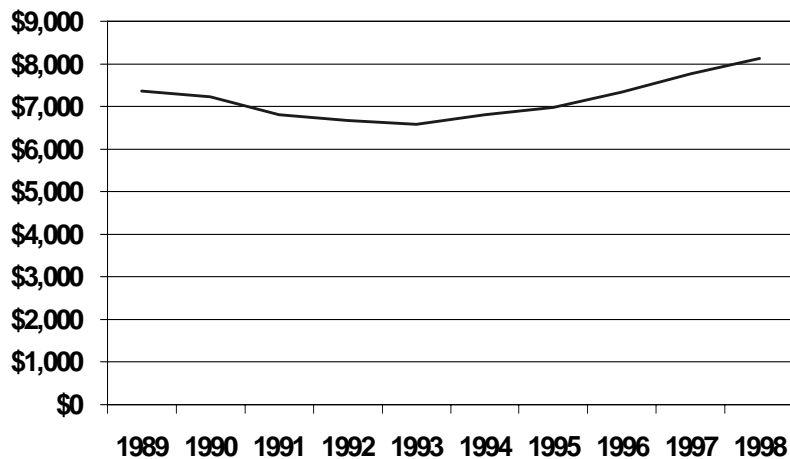
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Table 1
Taxable Transactions

<u>Type of Business</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>Change</u> <u>1989-1998</u>
Retail Stores:											
Apparel Stores:	\$1,082,141	\$1,142,821	\$1,152,107	\$1,142,096	\$1,165,259	\$1,204,183	\$1,195,474	\$1,284,769	\$1,346,631	\$1,361,470	25.8%
General Merchandise:	\$2,488,975	\$2,525,652	\$2,480,034	\$2,603,430	\$2,596,498	\$2,690,472	\$2,768,740	\$3,226,425	\$2,994,257	\$3,251,595	30.6%
Drug Stores:	\$324,672	\$344,561	\$363,387	\$412,178	\$390,406	\$395,410	\$387,581	\$391,198	\$407,701	\$399,311	23.0%
Food Stores:	\$1,191,882	\$1,237,585	\$1,356,367	\$1,447,061	\$1,184,804	\$1,148,808	\$1,172,306	\$1,237,789	\$1,322,157	\$1,359,193	14.0%
Packaged Liquor Stores:	\$168,370	\$166,879	\$157,247	\$155,915	\$142,484	\$138,814	\$142,568	\$146,706	\$145,285	\$149,048	-11.5%
Eating & Drinking Places:	\$2,199,758	\$2,296,063	\$2,288,942	\$2,270,637	\$2,306,451	\$2,387,239	\$2,476,906	\$2,616,560	\$2,790,135	\$2,990,871	36.0%
Home Furnishings & Appliances:	\$1,018,036	\$1,011,909	\$953,486	\$910,094	\$915,425	\$1,015,489	\$1,079,539	\$1,070,614	\$1,081,546	\$1,206,212	18.5%
Building Material & Farm Implements:	\$1,611,743	\$1,474,020	\$1,289,144	\$2,025,319	\$1,232,543	\$1,258,256	\$1,294,104	\$1,387,068	\$1,585,873	\$1,581,890	-1.9%
Auto Dealers & Supplies:	\$3,406,954	\$3,103,937	\$2,599,207	\$2,530,496	\$2,644,039	\$2,798,413	\$3,045,130	\$3,248,558	\$3,524,060	\$4,004,318	17.5%
Service Stations:	\$1,197,932	\$1,337,463	\$1,256,014	\$1,359,988	\$1,360,261	\$1,356,198	\$1,393,452	\$1,554,504	\$1,708,092	\$1,528,266	27.6%
Other Retail Stores:	\$2,757,086	\$2,845,543	\$2,825,135	\$1,961,980	\$2,874,540	\$3,161,053	\$3,313,362	\$3,286,606	\$4,077,586	\$4,623,933	67.7%
Retail Stores Total:	\$17,447,549	\$17,486,433	\$16,721,070	\$16,819,194	\$16,812,710	\$17,554,335	\$18,269,162	\$19,450,797	\$20,983,323	\$22,456,107	28.7%
Percent Change Retail		0.2%	-4.4%	0.6%	-0.0%	4.4%	4.1%	6.5%	7.9%	7.0%	
Business & Personal Services:	\$1,389,521	\$1,471,572	\$1,370,375	\$1,327,606	\$1,600,917	\$1,688,848	\$1,831,284	\$2,028,437	\$2,127,762	\$2,338,242	68.3%
Percent Change		5.9%	-6.9%	-3.1%	20.6%	5.5%	8.4%	10.8%	4.9%	9.9%	
All Other Outlets:	\$8,583,472	\$8,809,312	\$8,383,487	\$8,377,466	\$8,423,484	\$10,721,924	\$11,677,369	\$11,053,972	\$13,938,034	\$12,314,001	43.5%
Percent Change Other Outlets		2.6%	-4.8%	-0.1%	0.5%	27.3%	8.9%	-5.3%	26.1%	-11.7%	
Total All Outlets:	\$27,420,542	\$27,767,317	\$26,474,932	\$26,524,266	\$26,837,111	\$33,126,160	\$35,091,177	\$32,533,206	\$34,921,357	\$37,108,350	35.3%
Percent Change All Outlets		1.3%	-4.7%	0.2%	1.2%	23.4%	5.9%	-7.3%	7.3%	6.3%	

Source: California State Board of Equalization and Center for Demographic Research

CHART 1
PER CAPITA RETAIL SALES



Taxable transactions in retail stores were virtually flat between 1989 and 1994. The total volume of taxable transactions was \$17.4 billion in 1989 and \$17.6 in 1994. When you include building inflation into the equation, it indicates that the real dollar volume of retail sales actually declined. Chart 1 displays the per capita retail sales between 1989 and 1998. It is clear that retail spending declined between 1989 and 1993. During this period there were some overall notable big losers. These include food stores, packaged liquor stores, home furnishings and appliance stores, building material and farm implements, and auto dealers. Declines in the sale of motor vehicles, building materials, and home furnishings and appliances can be attributed directly to the recession. But the decline in food stores and packaged liquor stores is probably more attributable to changes in retail marketing practices, because both the general population and the adult population grew during this period and prices did not decline.

There were some notable exceptions to this 1989 to 1994 downward trend. These exceptions include apparel stores, general merchandise, drug stores, eating and drinking places, service stations and other retail stores. Growth in stores specializing in these types of merchandise can probably be attributed to shifts in retailing practices, continued population growth, and growth in licensed drivers. The other retail stores include a wide range of specialty stores, such as sporting goods, jewelry, and office supplies, and other products such as mobile homes, campers, planes and boats.

There was also a strong growth in Business and Personal Services. Although there were declines in 1991 and 1992, establishments in this area experienced a near 25% increase in taxable transactions between 1989 and 1994. This category is made up of businesses whose sales tax liability is based on the sales of materials and parts, while most of their revenue is from nontaxable services. An example would be a computer repair business that also includes the cost of parts used in the repair.

Taxable sales during the period between 1994 and 1998 reflects the turnaround in the local economy and the sustained growth. Almost across the board, each category registered a turnaround or a higher rate of growth. An exception would be the drug store category where taxable transactions in 1998 were virtually the same as in 1994. The flattening of the growth in sales at drug stores can possibly be attributed to the growth of the smaller, more specialized drug stores, combining drug stores with food stores, and the sale of over-the-counter prescription drugs at the “big box” stores. There was a drop in the price of gasoline in 1998 which could account for the drop in service station sales. Taxable transactions in building materials and farm implements have not reached the 1989 level yet. Although new home construction had not fully recovered by 1989, the 1999 and 2000 picture should be more favorable in this category.

SALES TAX PERMITS

Table 2 presents the number of sales tax permits for 1989 through 1998 by category. This is also graphically depicted in Chart 2. There was an 8.1 percent increase during this ten year period. The largest gains were in the general merchandise category (26.0%), drug stores (17.5%), food stores (37.1%), eating and drinking places (17.1%), auto dealers and supplies (47.4%), and other retail stores (42.3%). There was an overall 23.1 percent increase in retail store sales permits. The number of permits for packaged liquor stores, home furnishings and appliances, building material and farm implements, and service stations declined. The number of permits added in the categories of business and personal services and all other outlets was very modest and below the average, at 3.0 percent and 2.2 percent respectively. Both of these categories experienced large increases in taxable sales during this period. This highlights the trend that the average volume of taxable transactions is increasing, as illustrated in Chart 3.

Table 2
Sales Tax Permits

Type of Business	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	Change 1989-1998
Retail Stores:											
Apparel Stores:	2,209	2,314	2,339	2,363	2,430	2,358	2,357	2,286	2,225	2,246	1.7%
General Merchandise:	396	408	408	435	461	495	501	529	517	499	26.0%
Drug Stores:	383	395	385	423	436	448	434	463	450	450	17.5%
Food Stores:	1,168	1,515	1,497	1,531	1,519	1,494	1,558	1,578	1,616	1,601	37.1%
Packaged Liquor Stores:	450	469	477	475	454	456	437	423	423	407	-9.6%
Eating & Drinking Places:	5,407	5,541	5,610	5,925	5,928	5,969	6,059	6,103	6,254	6,332	17.1%
Home Furnishings & Appliances:	2,094	2,126	2,029	1,968	1,927	1,886	1,966	1,975	2,003	2,014	-3.8%
Building Material & Farm Implements:	927	946	969	968	934	873	867	856	869	888	-4.2%
Auto Dealers & Supplies:	1,293	1,314	1,294	1,339	1,432	1,539	1,609	1,700	1,722	1,906	47.4%
Service Stations:	893	868	858	844	771	778	752	743	725	736	-17.6%
Other Retail Stores:	8,575	8,957	9,007	9,503	10,098	10,425	10,904	11,627	12,126	12,205	42.3%
Retail Stores Total:	23,795	24,853	24,873	25,774	26,390	26,721	27,444	28,283	28,930	29,284	23.1%
Business and Personal Services:	8,481	8,557	8,497	8,732	8,886	8,844	8,948	8,870	8,715	8,738	3.0%
All Other Outlets:	52,707	54,188	53,207	54,846	55,560	55,945	56,781	55,652	55,121	53,845	2.2%
Total All Outlets:	84,983	87,598	86,577	89,352	90,836	91,510	93,173	92,805	92,766	91,867	8.1%

Chart 2
Sales Tax Permits

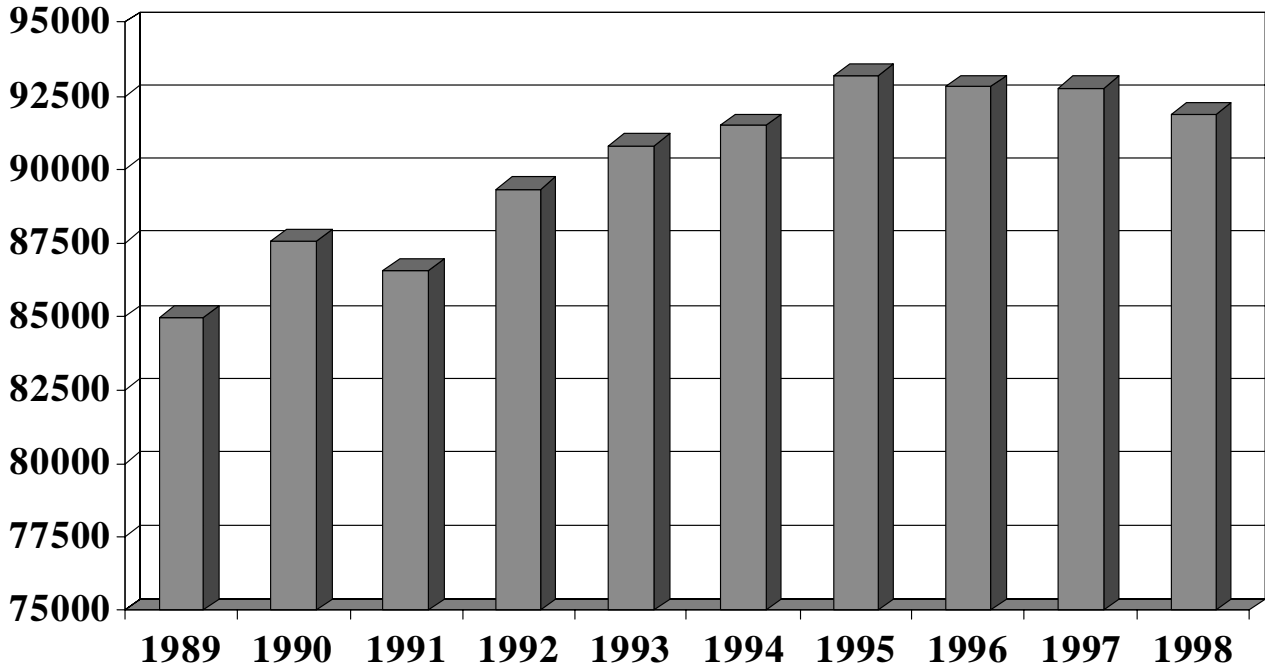
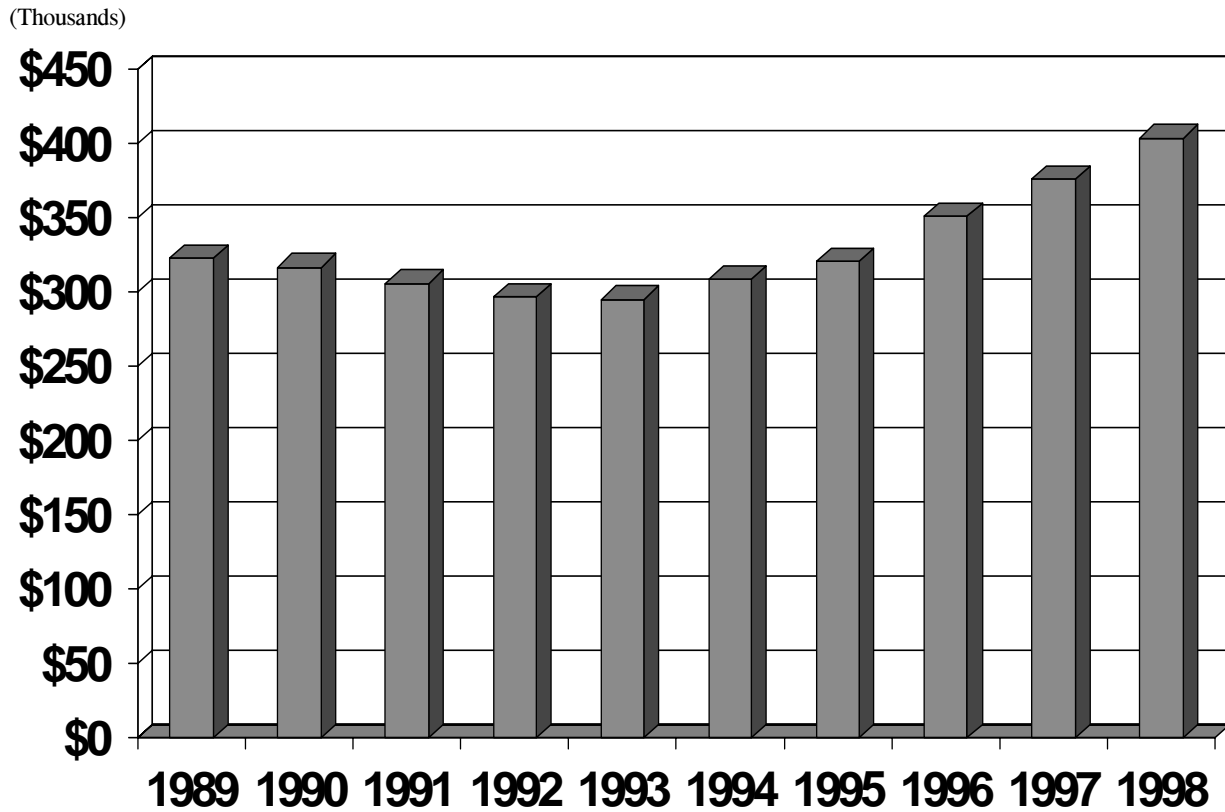


Chart 3
Taxable Transactions Per Sales Tax Permit



TAXABLE TRASACTIONS BY JURISDICTION

Tables 3 and 4 present both the total retail transactions and taxable transactions by jurisdiction. The general patterns discussed above are followed within each of the jurisdictions. That is, there was a drop during the recession and growth from mid-decade through 1998. Three exceptions to this pattern are Mission Viejo, Tustin and Yorba Linda. Each of these jurisdictions experienced growth in taxable transactions and retail transactions each year. The common thread shared by each of these jurisdictions is that they are all growth areas. The levels of population growth in these communities may have been sufficient to offset declines brought about by the recession.

Table 3
Taxable Sales by Jurisdiction

<u>Jurisdiction</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>
Anaheim	\$3,130,406	\$3,005,793	\$2,729,513	\$2,750,245	\$2,772,152	\$2,805,122	\$3,048,087	\$3,366,752	\$3,547,715	\$3,710,181
Brea	\$604,933	\$677,524	\$700,977	\$748,090	\$799,213	\$885,977	\$951,245	\$975,821	\$1,375,586	\$1,118,747
Buena Park	\$910,125	\$882,813	\$787,176	\$732,216	\$721,320	\$772,812	\$774,348	\$857,408	\$939,282	\$990,534
Costa Mesa	\$2,280,333	\$2,203,103	\$2,059,859	\$2,113,730	\$2,160,102	\$2,271,293	\$2,210,537	\$2,357,142	\$2,528,479	\$2,656,273
Cypress	\$271,313	\$297,352	\$323,253	\$305,823	\$315,139	\$337,191	\$502,341	\$637,271	\$641,848	\$643,560
Dana Point	#	\$202,466	\$189,926	\$185,987	\$184,803	\$190,356	\$195,271	\$215,513	\$235,748	\$256,932
Fountain Valley	\$444,536	\$623,393	\$612,765	\$648,717	\$641,937	\$729,650	\$728,698	\$741,413	\$747,375	\$779,984
Fullerton	\$1,217,264	\$1,187,141	\$1,120,552	\$1,141,786	\$1,079,256	\$1,105,183	\$1,143,532	\$1,191,617	\$1,225,763	\$1,248,945
Garden Grove	\$1,190,077	\$1,142,952	\$1,046,437	\$999,671	\$992,258	\$989,806	\$1,011,249	\$1,130,057	\$1,196,316	\$1,263,701
Huntington Beach	\$1,629,149	\$1,519,635	\$1,454,920	\$1,433,818	\$1,437,388	\$1,457,852	\$1,465,238	\$1,582,927	\$1,675,185	\$1,813,622
Irvine	\$1,997,294	\$1,948,010	\$1,959,566	\$2,031,364	\$2,151,115	\$2,354,695	\$2,515,921	\$2,736,725	\$3,041,923	\$3,302,804
Laguna Beach	\$197,501	\$200,499	\$192,628	\$191,202	\$180,742	\$190,675	\$199,357	\$217,767	\$231,511	\$243,121
Laguna Hills	#	#	#	\$326,349	\$309,817	\$339,250	\$344,412	\$460,097	\$588,741	\$626,117
Laguna Niguel	#	#	\$280,064	\$314,318	\$313,495	\$329,924	\$368,954	\$412,385	\$445,527	\$502,995
La Habra	\$391,407	\$396,812	\$368,748	\$358,122	\$356,533	\$360,558	\$387,905	\$406,858	\$422,751	\$436,413
Lake Forest	#	#	#	\$385,037	\$362,996	\$390,757	\$379,020	\$381,076	\$407,744	\$419,418
La Palma	\$57,181	\$83,671	\$103,206	\$102,011	\$99,511	\$94,475	\$110,999	\$127,424	\$202,820	\$207,054
Los Alamitos	\$179,969	\$185,224	\$173,719	\$169,490	\$178,323	\$171,419	\$173,935	\$180,530	\$188,841	\$188,814
Mission Viejo	\$504,851	\$512,275	\$514,015	\$526,865	\$578,411	\$652,417	\$751,051	\$801,497	\$853,283	\$908,679
Newport Beach	\$1,063,011	\$1,025,977	\$953,732	\$875,785	\$918,021	\$1,021,939	\$1,073,186	\$1,187,127	\$1,372,867	\$1,490,995
Orange	\$1,938,501	\$1,793,501	\$1,698,135	\$1,663,631	\$1,587,490	\$1,588,194	\$1,644,078	\$1,695,227	\$1,808,828	\$1,915,421
Placentia	\$254,416	\$258,448	\$240,093	\$242,505	\$239,895	\$253,387	\$278,660	\$308,314	\$347,481	\$377,141
San Clemente	\$226,583	\$249,178	\$224,399	\$239,462	\$240,778	\$252,007	\$256,976	\$276,503	\$291,514	\$307,536
San Juan Capistrano	\$291,518	\$299,188	\$269,775	\$270,867	\$255,072	\$245,907	\$286,037	\$318,946	\$364,317	\$434,206
Santa Ana	\$2,676,423	\$2,519,262	\$2,494,842	\$2,565,827	\$2,562,440	\$2,640,757	\$2,737,071	\$2,882,103	\$3,085,946	\$3,230,668
Seal Beach	\$103,231	\$111,749	\$113,874	\$115,877	\$113,485	\$133,501	\$121,956	\$136,300	\$126,953	\$132,762
Stanton	\$248,463	\$244,725	\$226,946	\$213,894	\$203,432	\$200,076	\$211,514	\$221,437	\$249,270	\$261,737
Tustin	\$718,001	\$794,675	\$807,211	\$830,728	\$918,110	\$1,020,345	\$1,073,786	\$1,185,542	\$1,324,601	\$1,413,033
Unincorporated	\$4,306,798	\$4,499,258	\$3,957,499	\$3,105,202	\$3,198,097	\$3,497,977	\$3,937,344	\$4,333,100	\$4,735,944	\$5,181,235
Villa Park	\$13,106	\$14,872	\$14,385	\$14,523	\$12,182	\$14,616	\$13,021	\$12,842	\$12,987	\$13,517
Westminster	\$763,689	\$801,284	\$759,761	\$767,430	\$737,369	\$760,614	\$813,286	\$882,175	\$935,281	\$1,055,472
Yorba Linda	\$142,750	\$185,080	\$214,547	\$270,228	\$262,441	\$266,914	\$284,796	\$313,310	\$331,756	\$386,118

Source: California State Board of Equalization

Table 4
Retail Sales by Jurisdiction

<u>Jurisdiction</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>
Anaheim	\$1,647,261	\$1,558,755	\$1,506,296	\$1,483,251	\$1,441,500	\$1,483,835	\$1,603,821	\$1,699,108	\$1,780,222	\$1,813,378
Brea	\$393,991	\$445,334	\$493,616	\$519,347	\$528,127	\$575,737	\$610,894	\$656,660	\$681,548	\$773,317
Buena Park	\$659,304	\$645,595	\$576,060	\$541,830	\$538,293	\$583,429	\$574,761	\$618,352	\$659,102	\$699,060
Costa Mesa	\$1,819,457	\$1,722,577	\$1,564,938	\$1,591,735	\$1,629,794	\$1,737,547	\$1,768,659	\$1,855,735	\$1,954,721	\$2,029,756
Cypress	\$170,428	\$176,404	\$182,816	\$181,674	\$175,914	\$175,356	\$179,178	\$193,027	\$198,804	\$222,687
Dana Point	#	\$145,902	\$138,508	\$137,933	\$134,414	\$139,739	\$141,683	\$152,653	\$167,066	\$184,344
Fountain Valley	\$334,347	\$494,649	\$491,041	\$524,471	\$515,975	\$548,207	\$530,612	\$542,799	\$539,180	\$560,216
Fullerton	\$936,816	\$916,764	\$865,379	\$856,124	\$806,846	\$794,986	\$799,852	\$867,138	\$899,402	\$900,349
Garden Grove	\$910,609	\$882,514	\$799,697	\$795,459	\$799,357	\$781,291	\$789,475	\$808,291	\$850,673	\$879,739
Huntington Beach	\$1,331,553	\$1,225,477	\$1,155,145	\$1,135,441	\$1,150,635	\$1,154,417	\$1,156,396	\$1,214,347	\$1,262,807	\$1,341,259
Irvine	\$967,898	\$956,447	\$962,507	\$980,979	\$1,027,664	\$1,111,552	\$1,190,732	\$1,289,558	\$1,502,763	\$1,676,310
Laguna Beach	\$160,355	\$161,976	\$157,594	\$156,358	\$146,653	\$153,019	\$158,729	\$173,569	\$182,940	\$188,652
Laguna Hills	#	#	#	\$303,799	\$288,022	\$318,446	\$310,934	\$367,943	\$462,318	\$503,426
Laguna Niguel	#	#	\$235,928	\$276,707	\$276,942	\$293,689	\$329,796	\$368,761	\$392,881	\$439,976
La Habra	\$320,302	\$331,378	\$310,026	\$298,614	\$286,795	\$294,583	\$321,467	\$334,693	\$350,613	\$350,413
Lake Forest	#	#	#	\$321,999	\$297,745	\$312,102	\$303,950	\$289,971	\$304,920	\$303,305
La Palma	\$34,570	\$37,889	\$35,316	\$32,240	\$36,007	\$37,511	\$36,986	\$37,729	\$110,819	\$111,291
Los Alamitos	\$104,910	\$112,998	\$100,774	\$95,811	\$99,518	\$96,257	\$91,868	\$91,362	\$152,163	\$96,149
Mission Viejo	\$433,496	\$431,533	\$432,280	\$445,326	\$487,987	\$559,223	\$650,124	\$684,989	\$721,501	\$764,720
Newport Beach	\$790,444	\$773,089	\$678,533	\$664,322	\$681,135	\$739,506	\$801,862	\$878,593	\$1,011,661	\$1,108,961
Orange	\$1,209,486	\$1,192,377	\$1,099,231	\$1,094,994	\$1,064,126	\$1,067,119	\$1,057,479	\$1,081,984	\$1,119,475	\$1,214,255
Placentia	\$187,777	\$180,049	\$163,697	\$161,026	\$162,749	\$174,834	\$195,953	\$218,980	\$235,252	\$249,858
San Clemente	\$170,302	\$191,114	\$172,079	\$184,556	\$180,492	\$180,620	\$175,627	\$185,321	\$200,178	\$206,819
San Juan Capistrano	\$238,104	\$242,489	\$221,833	\$220,485	\$204,622	\$202,837	\$243,657	\$270,115	\$303,240	\$347,041
Santa Ana	\$1,717,152	\$1,606,956	\$1,569,701	\$1,569,964	\$1,544,396	\$1,567,424	\$1,590,879	\$1,650,875	\$1,744,459	\$1,874,796
Seal Beach	\$86,815	\$96,497	\$99,240	\$101,351	\$98,565	\$99,425	\$105,661	\$106,685	\$111,924	\$112,337
Stanton	\$168,065	\$170,952	\$169,433	\$163,033	\$150,942	\$143,005	\$145,940	\$159,810	\$187,533	\$199,436
Tustin	\$507,285	\$599,950	\$615,733	\$643,360	\$714,857	\$807,031	\$836,728	\$899,270	\$984,334	\$1,043,517
Unincorporated	\$1,394,964	\$1,375,211	\$1,131,404	\$501,548	\$543,769	\$611,194	\$698,316	\$494,964	\$960,985	\$1,895,234
Villa Park	\$10,867	\$11,344	\$11,567	\$11,982	\$10,169	\$11,876	\$10,294	\$10,615	\$11,004	\$10,780
Westminster	\$673,796	\$714,234	\$675,722	\$684,965	\$661,059	\$676,284	\$725,093	\$779,822	\$823,422	\$933,855
Yorba Linda	\$112,632	\$135,212	\$151,859	\$182,732	\$173,853	\$171,641	\$179,036	\$195,351	\$237,236	\$291,296
Westminster	\$763,689	\$801,284	\$759,761	\$767,430	\$737,369	\$760,614	\$813,286	\$882,175	\$935,281	\$1,055,472
Yorba Linda	\$142,750	\$185,080	\$214,547	\$270,228	\$262,441	\$266,914	\$284,796	\$313,310	\$331,756	\$386,118

Source: California State Board of Equalization

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