

External Environmental Scan

January 28, 2025

Data and Trends

NATIONAL, STATE, REGIONAL



Social

- Public perception of the value of higher education is declining
- Student demographics are changing
- Students are increasingly demanding access to learning anytime, anywhere



Technological

- Concerns about cybersecurity and privacy are increasing
- The use of **learning analytics** continues to rise
- The digital divide persists







Economic

- The demand for and focus on workforce skills is growing
- Challenges for employee retention are growing
- Student debt is increasingly impacting students' enrollment decisions



Environmental

- Higher ed institutions are increasing their commitment to sustainability
- Concerns about the impact of big data tools on the environment are rising
- The demand for green skills in the workforce is increasing







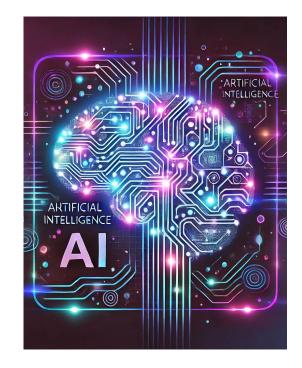
Political

- Political polarization in the United States continues to impact higher education
- Government policy is increasingly influencing education
- The need is growing for policies that address emerging technologies



<u>Artificial Intelligence</u>

- Social: Al is changing the way we **communicate**
- Technological: Al tools have growing potential to reshape pedagogy and student experiences
- Economic: Al is increasingly having an impact on the economy and workforce
- Environmental: All is increasingly being used to address climate change and **sustainability** issues
- Political: The potential for the use of AI in politics is growing









State Trends

California Community Colleges Initiatives

Vision for Success

- Guided Pathways
- Student Centered Funding Formula

Governor's Roadmap for CCCs Vision 2030

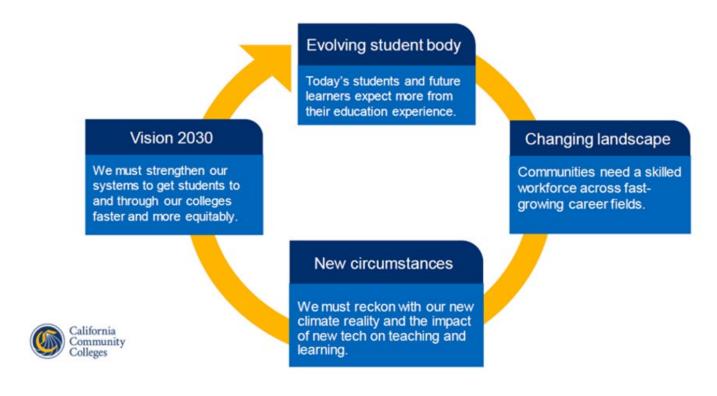


Vision for Success Goals (2017-2022) Governor's Roadmap Goals (2021-2027)

Vision 2030 (2023-2030)



Vision 2030: Meeting the Needs of Today and the Opportunities of Tomorrow



Source: California Community Colleges Chancellor's Office, Vision 2030, October 16, 2023



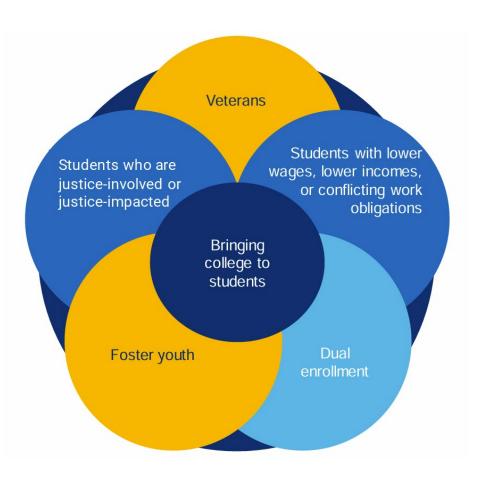
Vision 2030: Goals and Metrics







Vision 2030: New Pathways to Reach Future Learners



Strategic Directions

- 1. Equitable **Baccalaureate** Attainment
- 2. Equitable **Workforce** & Economic Development
- 3. Generative **Artificial Intelligence** and the Future of Learning





California State Plan for Career & Technical Education, 2023

Initial Goals

- Boost data-informed decisionmaking for equity & impact
- 2. Expand **work-based learning** in all regions with a focus on equity
- 3. Grow **dual enrollment** in all regions with a focus on equity
- 4. Understand and plan to address CTE teacher & faculty shortages





Student Centered Funding Formula

Factored into Base Allocation

- Credit Inmates in Correctional Facilities
- CDCP
- Credit Special Admit Students

Supplemental Allocation Metrics

- AB540 Students
- Pell Grant Recipients
- Promise Grant Recipients

Student Success Allocation Metrics

- Associate Degree for Transfer (ADT)
- Associate Degree
- Baccalaureate Degree
- Credit Certificate
- Transfer to a Four-Year University
- Completion of Transfer Level Math and English in Year 1
- Nine or More CTE Units
- Attainment of Regional Living Wage

Source: CCCCO



Strong Workforce Priority Sectors





- Advanced Manufacturing
- Advanced Transportation
- Agriculture, Water and Environmental Tech
- Business and Entrepreneurship
- Energy, Construction and Utilities
- Education
- Health
- Information and Communication Tech and Digital Media
- Life Sciences and Biotechnology
- Public Safety
- Retail Hospitality

Source: South Central Coast Regional Consortium <u>Strong Workforce</u> Program 4-Year Plan 2024



San Luis Obispo County Economic Strategy

Key Industries

- Aerospace + Defense
- Agriculture Technology
- Building + Design + Construction
- Healthcare + Life Sciences
- Precision Manufacturing
- Clean Tech + Renewable Energy
- Technology + Innovation



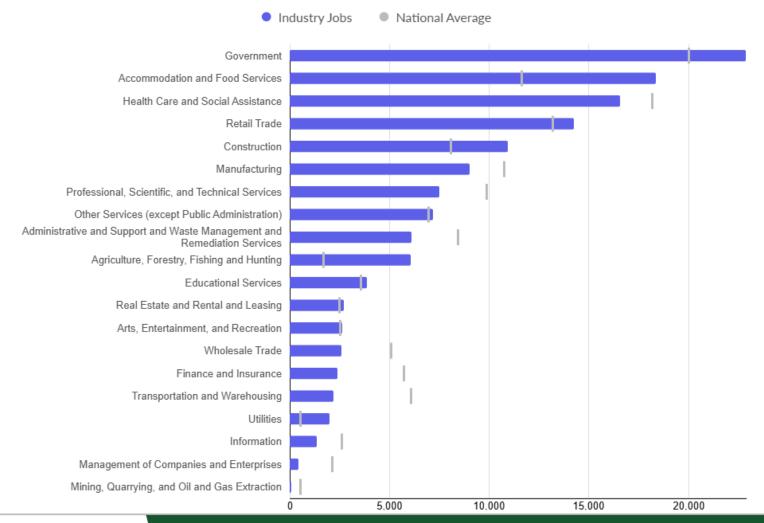
Source: County of San Luis Obispo, and <u>REACH 2030</u>: 10 Year Action Plan for Central Coast job creation (includes both San Luis Obispo and Santa Barbara Counties)

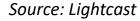






Top Industries, SLO County, 2023







Top Occupations, SLO County, 2023







Jobs Postings, Jan 2023 to Dec 2024

Top Companies	Unique Postings				
State of California	767				
Cal Poly San Luis Obispo	754				
UPMC Mercy School of Nursi	750				
California State University	509				
Cuesta College	494				
County Of San Luis Obispo	483				
Cal Poly State University	461				
California Polytechnic State U	429				
Sierra Vista Regional Medical	416				
Adventist Health	367				

Top Job Titles	Unique Postings				
Medical Assistants	389				
Sales Associates	316				
Registered Nurses	311				
Administrative Assistants	303				
Caregivers	277				
Housekeepers	245				
Retail Sales Associates	237				
Baristas	234				
Servers	213				
Retail Merchandisers	209				



Top Jobs for Associate Degree Earners, San Luis Obispo County

Job Category	2025 Jobs	2023 - 2025 % Change	Avg. Annual Openings	Cuesta College Completions (2023)	Gap	Median Hourly Earnings
Preschool Teachers, Except Special Education	425	3%	52	48	4	\$18.71
Paralegals and Legal Assistants	244	3%	27	16	11	\$27.18
Dental Hygienists	232	4%	19	0	19	\$59.58
Cardiovascular Technologists and Technicians	164	1%	11	0	11	\$48.62
Veterinary Technologists and Technicians	144	6%	17	0	17	\$21.67
Architectural and Civil Drafters	140	1%	14	17	(3)	\$31.41
Magnetic Resonance Imaging Technologists	107	1%	6	0	6	\$37.61
Radiologic Technologists and Technicians	106	3%	7	0	7	\$50.63
Food Science Technicians	103	6%	16	1	15	\$23.95
Forest and Conservation Technicians	98	1%	12	0	12	\$29.40
Physical Therapist Assistants	85	6%	14	0	14	\$39.20
Civil Engineering Technologists and Technicians	82	4%	9	10	(1)	\$36.74
Electrical and Electronic Engineering Techs	71	3%	8	1	7	\$32.29
Computer Network Support Specialists	71	(2%)	5	38	(33)	\$34.27
Life, Physical, and Social Science Technicians, All Other	61	3%	8	21	(13)	\$28.12

Note: Blue denotes above living wage (\$26.45) for one adult no children (Source: MIT) and yellow denotes a gap



Top Jobs for Certificate Earners, San Luis Obispo County

Job Description	2025 Jobs	2023 - 2025 % Change	Avg. Annual Openings	Cuesta College Completions (2023)	Gap	Median Hourly Earnings
Hairdressers, Hairstylists, and Cosmetologists	1,560	6%	249	0	249	\$17.15
Heavy and Tractor-Trailer Truck Drivers	1,089	1%	121	0	121	\$26.42
Automotive Service Technicians and Mechanics	870	4%	91	21	70	\$23.67
Medical Assistants	860	2%	117	7	110	\$22.55
Nursing Assistants	599	4%	95	1	94	\$21.19
Licensed Practical and Licensed Vocational Nurses	504	2%	43	22	21	\$35.96
Firefighters	439	3%	38	167	(129)	\$32.88
Dental Assistants	420	3%	63	0	63	\$23.30
Manicurists and Pedicurists	402	4%	54	0	54	\$15.08
Massage Therapists	392	4%	58	0	58	\$17.42
Psychiatric Technicians	383	(0%)	31	74	(43)	\$44.20
Heating, Air Conditioning, and Refrigeration Mechanics	320	1%	30	0	30	\$27.46
Skincare Specialists	187	6%	29	0	29	\$18.99
Barbers	175	7%	24	0	24	\$15.15
Aircraft Mechanics and Service Technicians	174	9%	19	0	19	\$36.74

Note: Blue denotes above living wage (\$26.45) for one adult no children (Source: MIT) and yellow denotes a gap



Top Jobs for Bachelor Degree Earners, San Luis Obispo County

Job Description	2025 Jobs	2023 - 2025 % Change	Avg. Annual Openings	Cuesta College Completions (2023)	Gap	Median Hourly Earnings
Managers, All Other	2,598	3%	225	2,873	(2,648)	\$29.96
Personal Financial Advisors	2,463	10%	257	0	257	\$56.85
General and Operations Managers	2,177	3%	202	2,563	(2,361)	\$48.12
Registered Nurses	2,132	3%	140	44	96	\$63.57
Management Analysts	1,464	3%	136	1,024	(888)	\$38.83
Accountants and Auditors	1,274	1%	104	312	(208)	\$39.96
Securities, Commodities, and Financial Services Sales Agents	1,250	4%	121	68	53	\$29.84
Business Operations Specialists, All Other	1,065	2%	103	2,658	(2,555)	\$32.89
Elementary School Teachers, Except Special Education	1,015	2%	76	51	25	\$46.67
Property Appraisers and Assessors	943	8%	109	0	109	\$25.97
Construction Managers	856	2%	72	715	(643)	\$38.19
Market Research Analysts and Marketing Specialists	795	4%	84	400	(316)	\$28.94
Chief Executives	760	4%	65	2,557	(2,492)	\$60.43
Civil Engineers	747	3%	55	7	48	\$47.71
Project Management Specialists	724	2%	58	2,635	(2,577)	\$48.45

Note: Blue denotes above living wage (\$26.45) for one adult no children (Source: MIT) and yellow denotes a gap



Remote Work

- One in five workers nationally is working remotely
- **16%** of companies are fully remote, operating without a physical office
- The highest percentage of remote workers are aged 24 to 35 – within this age group, 39% work remotely full-time and 25% do so part time
- The top industries for remote work are Computer & IT, Accounting and Finance, Marketing, Medical & Health, Project Management, Customer Service, Sales, Administrative, HR & Recruiting, and Operations.
- The top remote job titles are Accountant, Executive
 Assistant, Financial Analyst, Product Manager, Customer
 Service Rep, Software Engineer, Customer Success
 Manager, Accounting Manager, Product Designer, and
 Writer.

Source: US Census and other data quoted in <u>Forbes</u>



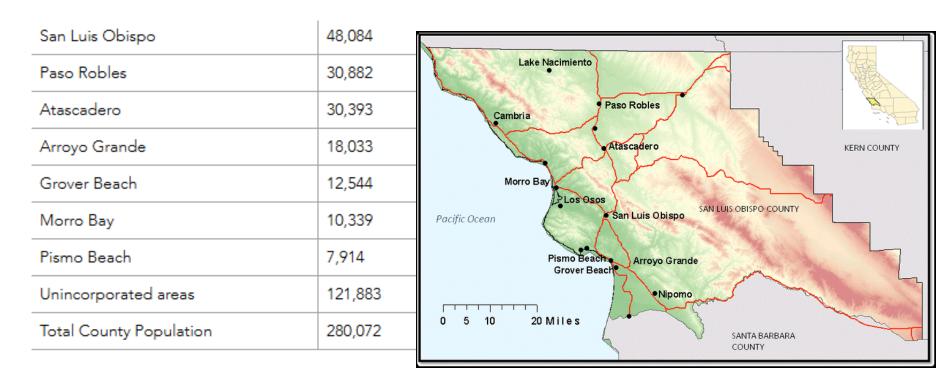




Cuesta College's Service Area: San Luis Obispo County

San Luis Obispo County

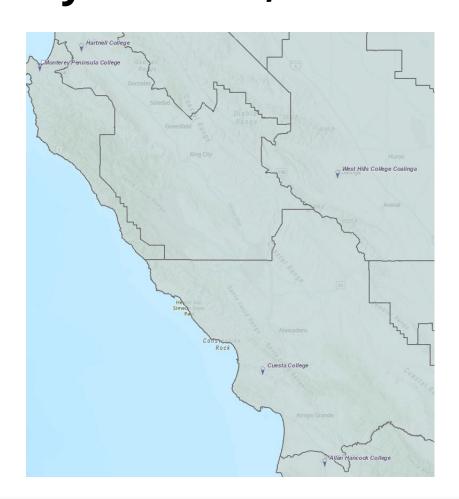
Population



Source: CA Department of Finance, 2023 estimates



Cuesta College Service Area and Enrollment by ZIP Code, Fall 2023



 Paso Robles 	2,014
 San Luis Obispo 	1,963
 Atascadero 	1,310
 Arroyo Grande 	986
 Nipomo 	548
 Los Osos 	511
 Templeton 	466
 Morro Bay 	429
 Grover Beach 	394
 Santa Maria* 	273
 Oceano 	245
 San Miguel 	189
 Cambria 	169
 Pismo/Shell Beach 	162

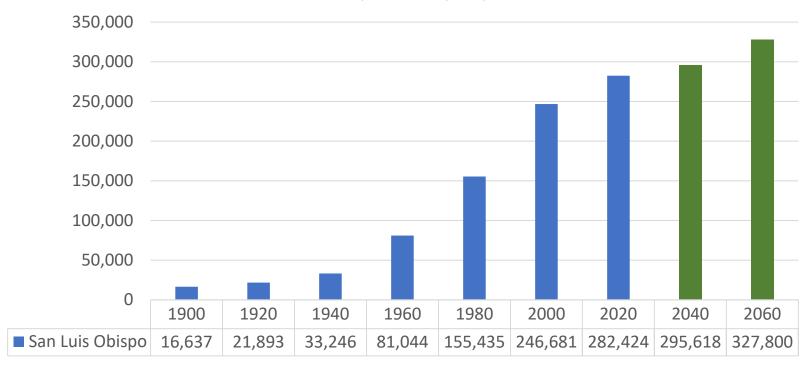
^{*}Outside of SLO County. In addition, Bradley, Lompoc, King City and Hollister all show double digit enrollment.

Data Source: CCCCO and Map: Foundation for CCCs



Population of San Luis Obispo County, Historic and Projected

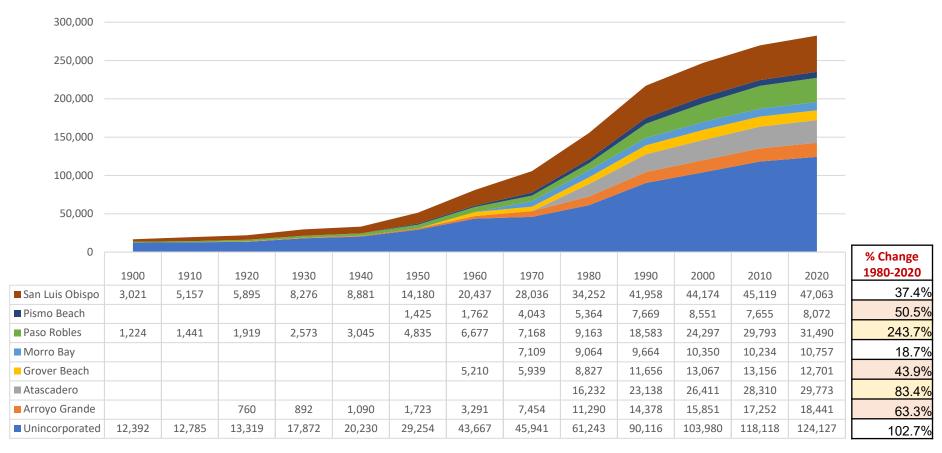




Source: California Department of Finance



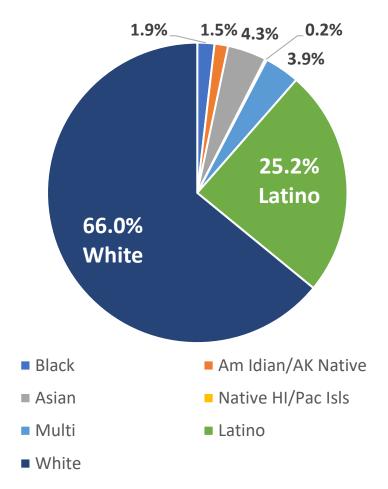
Historic Population of San Luis Obispo County, by Town/City, 1900-2020



Source: <u>CA Department of Finance</u>, Historical Census Populations Notes:



SLO County Population by Ethnicity, 2023



- The majority (approximately two-thirds) of San Luis Obispo County Residents in 2023 were White
 - <u>Down</u> from 81% in 1990
- One-quarter of county residents in 2023 were Latino
 - *Up* from 13% in 1990
- The next largest ethnic groups in 2023 were Asian (4.3%), Multi (3.9%), Black (1.9%) and American Indian (1.5%)

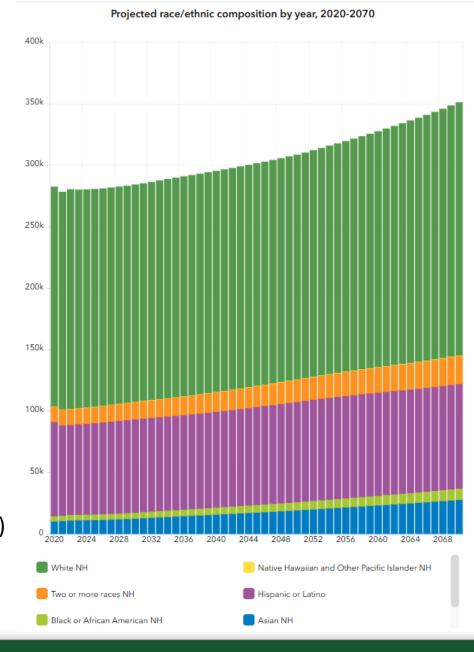
Source: US Census

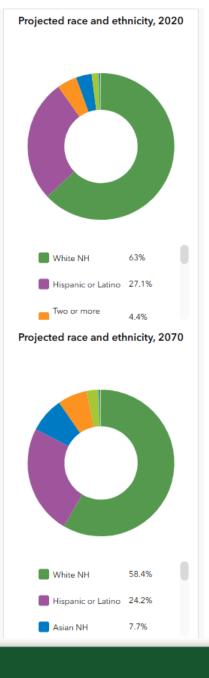


SLO County Population Projections by Ethnicity

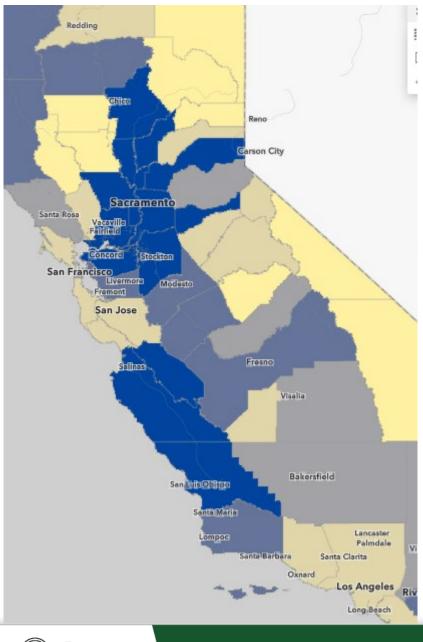
- The SLO population is projected to increase
 26% between 2020
 (278.5K) and 2070
 (351.4K)
- During the same time frame, the population of California is projected to increase
 5.1% (39.2 to 41.2 mil)

<u>Source: CA Department of</u>
<u>Finance, Population Projections</u>
2024









Projected Population Change, 2020-2070

- Counties north of SLO (Monterey, San Benito) are expected to grow significantly in the next 50 years
- Counties south and east of SLO are projected to have more modest growth (Santa Barbara, Kern) or even slightly decrease (Kings)

Projected population change

Percentage change

> 22.1 - 50.7

> 6.7 - 22.1

> 0 - 6.7

> -21.2 - 0

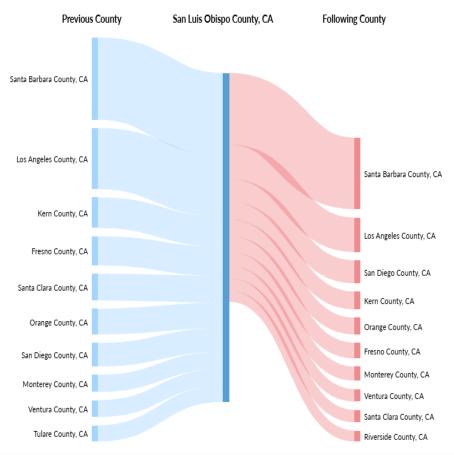
-52.2 - -21.2



Source: CA Department of Finance, Population Projections 2024



Inbound and Outbound Migration, 2022



Top Previous Counties	Migrations	Top Following Counties	Migrations
Santa Barbara County, CA	1,270	Santa Barbara County, CA	1,106
Los Angeles County, CA	943	Los Angeles County, CA	531
Kern County, CA	469	San Diego County, CA	353
Fresno County, CA	449	Kern County, CA	273
Santa Clara County, CA	412	Orange County, CA	257
Orange County, CA	397	Fresno County, CA	242
San Diego County, CA	364	Monterey County, CA	216
Monterey County, CA	265	Ventura County, CA	193
Ventura County, CA	259	Santa Clara County, CA	191
Tulare County, CA	249	Riverside County, CA	168

In 2022, SLO County experienced a net loss of 390 residents



Projected Population by Age, 2020-2070

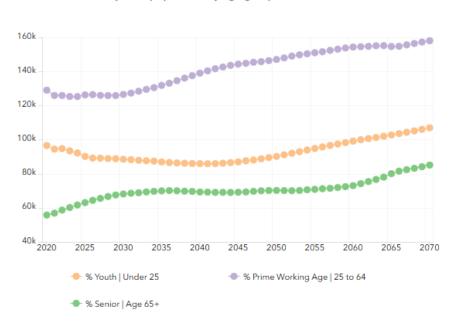
California

Projected population by age group, 2020 to 2070

20M 15M 2020 2025 2030 2035 2040 2045 2050 2055 2060 2065 2070

San Luis Obispo County

Projected population by age group, 2020 to 2070



Source: CA Department of Finance, Population Projections 2024

% Prime Working Age | 25 to 64



% Youth | Under 25

% Senior | Age 65+

Service Area Population Demographics Compared

	Atascadero	El Paso de Robles	San Luis Obispo (city)	San Luis Obispo County	California	United States
Population estimates,						
2023	29,700	31,134	49,244	281,639	38,965,193	334,914,895
Percent Change from						
2010	4.9%	4.5%	9.1%	4.5%	4.6%	8.5%
Percent Change from						
2020	0.2%	-1.1%	4.5%	-0.3%	-1.4%	1.0%
Persons under 18 years,						
percent	21.0%	25.3%	10.8%	17.2%	21.7%	21.7%
Persons 65 years and						
over, percent	17.2%	19.6%	13.7%	22.9%	16.2%	17.7%



Service Area Population Demographics Compared

	Atascadero	El Paso de Robles	San Luis Obispo (city)	San Luis Obispo County	California	United States
Black	0.6%	0.3%	1.2%	1.9%	6.5%	13.7%
American Indian / Alaska Native	0.8%	1.6%	0.6%	1.5%	1.7%	1.3%
Asian	4.2%	3.4%	5.4%	4.3%	16.5%	6.4%
Native HI / Other Pac Islander	0.0%	0.1%	0.2%	0.2%	0.5%	0.3%
Two or More Races	13.9%	18.9%	11.7%	3.9%	4.3%	3.1%
Latino	23.1%	36.6%	17.3%	25.2%	40.4%	19.5%
White, not Hispanic or Latino	66.9%	53.3%	70.5%	66.0%	34.3%	58.4%
Foreign-born persons	7.6%	16.0%	7.8%	9.6%	26.7%	13.9%
Language other than English						
spoken at home	13.1%	26.9%	16.6%	17.2%	44.1%	22.0%



Service Area Population Demographics Compared

		El Paso de	San Luis Obispo	San Luis Obispo		United
	Atascadero	Robles	(city)	County	California	States
Median household income	\$88,830	\$93,098	\$66,711	\$93,398	\$96,334	\$78,538
Per capita income	\$59,728	\$43,615	\$45,462	\$49,581	\$47,977	\$43,289
Median house value	\$673,400	\$648,400	\$896,500	\$777,200	\$695,400	\$303,400
Median gross rent	\$1,855	\$1,947	\$1,906	\$1,899	\$1,956	\$1,348
Persons in poverty	9.9%	12.8%	30.0%	12.8%	12.0%	11.1%



Service Area Population Demographics Compared

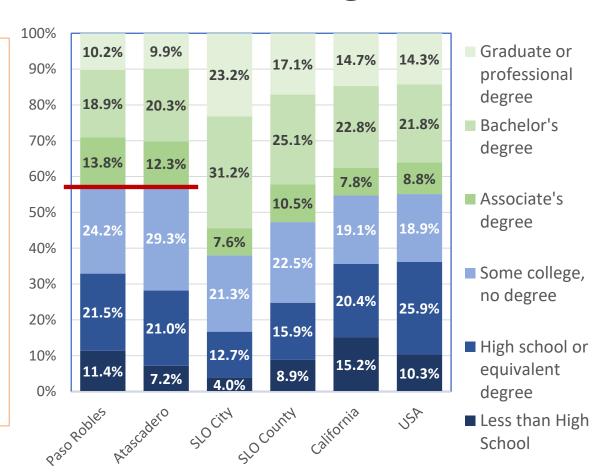
		El Paso de	San Luis Obispo	San Luis Obispo		United
	Atascadero	Robles	(city)	County	California	States
Households with a computer	95.9%	97.0%	96.5%	96.6%	96.4%	94.8%
Households with broadband						
Internet	93.7%	94.2%	92.1%	92.4%	92.5%	89.7%
High school grad+, 25 years or						
older	92.8%	88.7%	96.0%	91.8%	84.6%	89.4%
Bachelor degree+, 25 years or						
older	30.2%	29.1%	54.4%	39.2%	36.5%	35.0%
Mean travel time to work						
(minutes), workers age 16+	21.9	23.9	15.6	21.4	29	26.6



Educational Attainment, Aged 25+

- Overall, SLO County and city post higher educational attainment levels than the state or nation
- 47.3% of SLO County residents have less than an Associate Degree
- The rate is much higher for Paso Robles (57%) and Atascadero (58%)

(Note: "Some College" can include certificate earners)



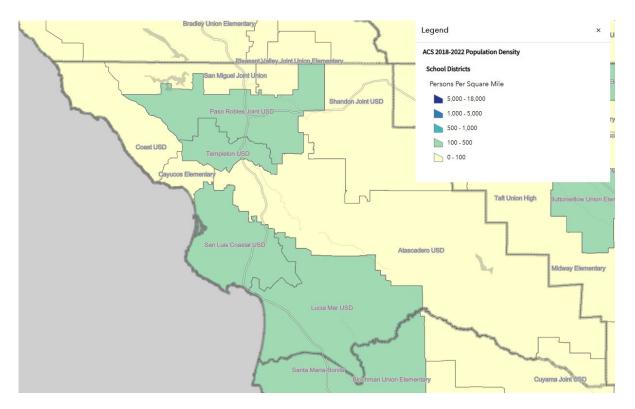
Source: US Census Data Profiles







School Districts within SLO County

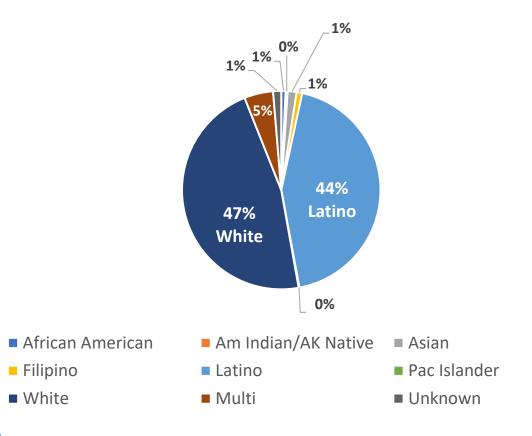


- Atascadero USD
- Cayucos Elementary
- Coast USD
- Cuyama Joint USD
- Lucia Mar USD
- Paso Robles Joint USD
- San Luis Coastal USD
- San Miguel Joint Union
- Shandon Joint Union
- Templeton USD

Source: CA Department of Finance ACS Population Density <u>Map</u> by School Districts



San Luis Obispo County K-12 Enrollment, by Ethnicity, 2023-24



Source: CDE DataQuest



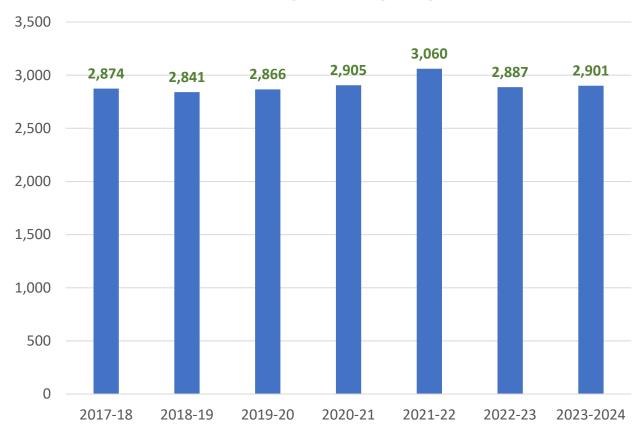
San Luis Obispo County English Language Learners, 2023-24

- 25.7% of K-12 students are currently or were formerly designated ELL
- Of those students, 90.1% speak Spanish as there first language, and 3.2% speak Otomian languages (Mixteco)
- Fifty-two different first languages are reported for ELL and former ELL students, but all besides Spanish and Mixteco are below 1%

Source: CDE DataQuest



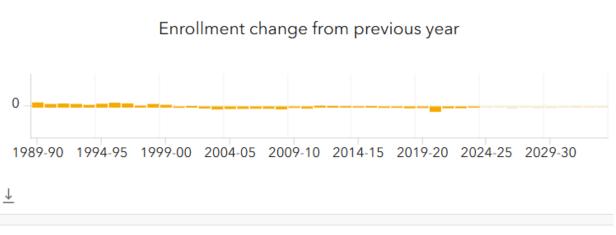
San Luis Obispo County Twelfth Grade Enrollment



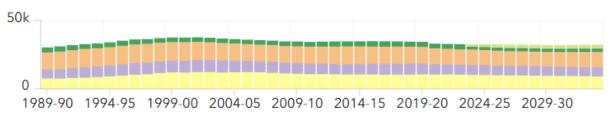
Source: CDE <u>DataQuest</u>



SLO County K-12 Enrollment Projections



Enrollment by grade by school year



- Enrollment in county schools is projected to be relatively flat in the next decade, decreasing 1.3% from 32,607 in 2023-24 to 32,181 in 2033-2034
- Statewide, enrollment is projected to decrease 10.0% in the same time period

Source: <u>CA Department of</u> <u>Finance</u>, School Enrollment Projections



Service Area High Schools, Compared

District	N	Cohort Graduation Rate	% Meeting UC/CSU Requirements	College Going Rate	% of grads going to college choosing a CCC
Atascadero	370	92.2%	54.6%	57.5%	72.3%
Coast	58	98.3%	42.1%	81.0%	61.7%
Lucia Mar	871	94.3%	51.3%	66.1%	63.7%
Paso Robles	619	90.5%	22.5%	55.4%	68.1%
San Luis Coastal	646	95.8%	63.2%	82.6%	53.5%
San Luis County Office of Education	204	83.8%	0%	19.5%	94.9%
Shandon	22	90.9%	5.0%	60.0%	100%
Templeton	206	97.6%	48.8%	71.2%	48.6%
California Statewide Average		87.0%	51.4%	62.0%	52.4%

Notes: **BOLD** indicates higher than the state average; Data from 2021-22

Source: CDE <u>DataQuest</u>



