



SLO County Workforce Development Board &
Paso Robles Chamber of Commerce

State of the North County

Agenda



1 **Regional Demographics and Characteristics**

2 **Economic, Industry, & Occupational Analysis**

3 **Things to Consider**

North County Region Region



Zip Codes

Paso Robles	93446
Atascadero	93422
Templeton	93465
Shandon	93461
Creston	93432



1

Regional Demographics and Characteristics

Regional Demographics and Characteristics

Population

Total 2017 Population: 89,572

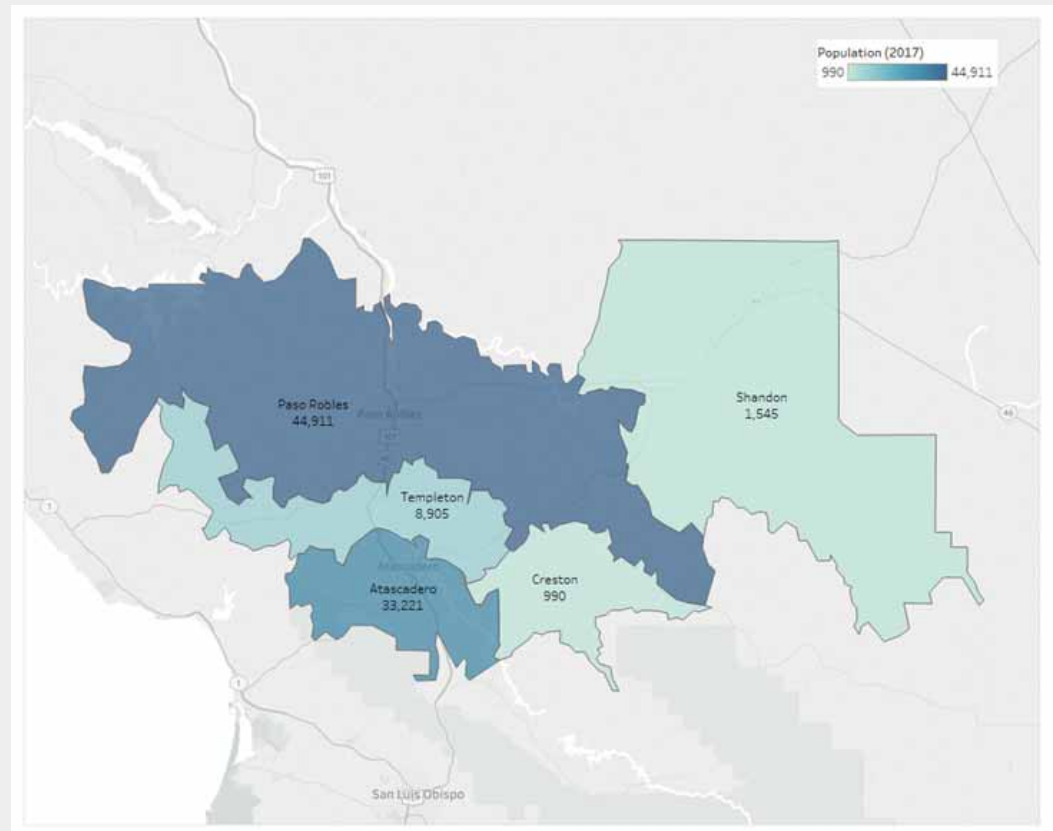
93446 (Paso Robles) **44,911**

93422 (Atascadero) **33,221**

93465 (Templeton) **8,905**

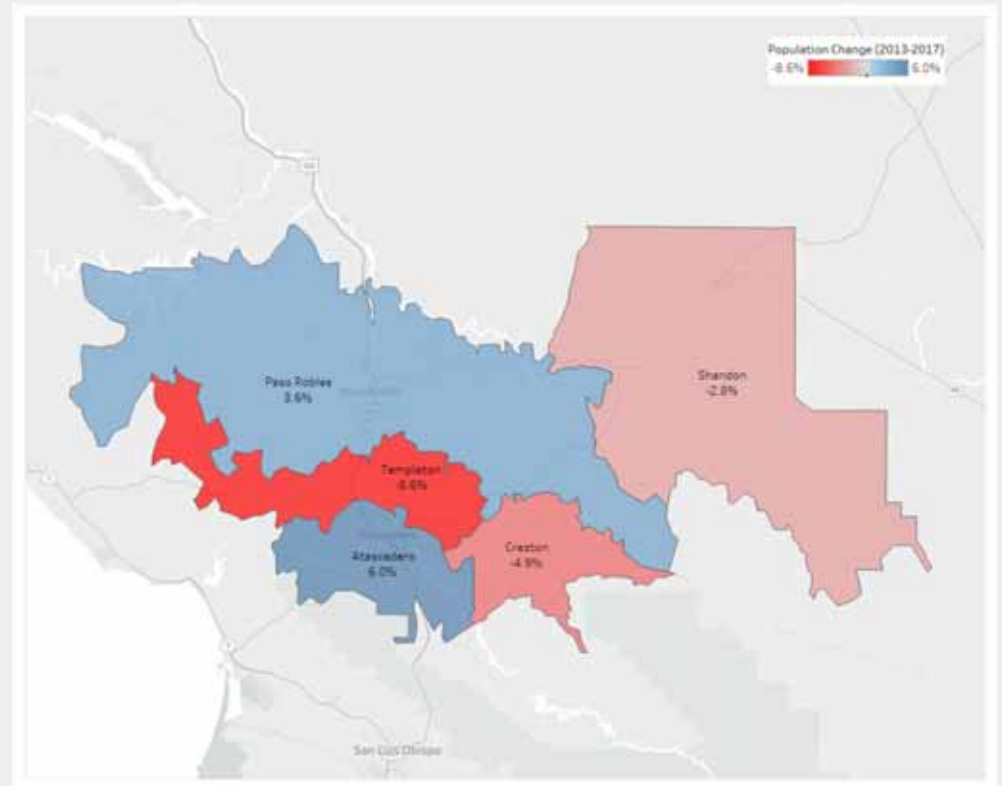
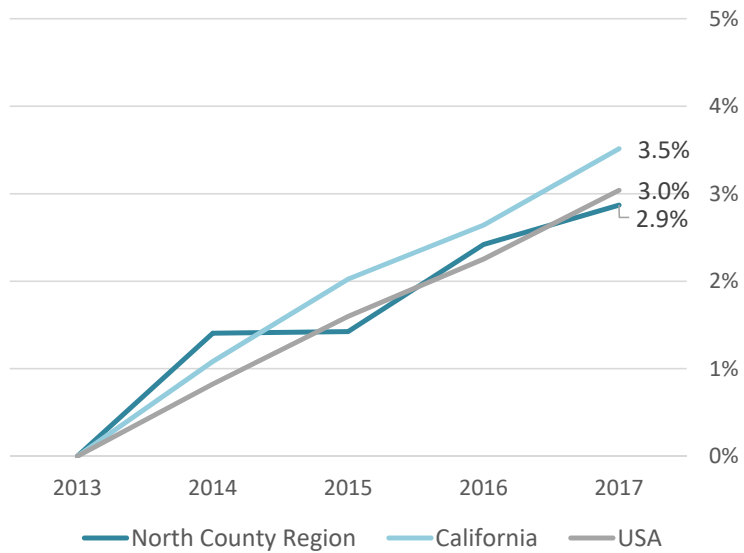
93461 (Shandon) **1,545**

93432 (Creston) **990**



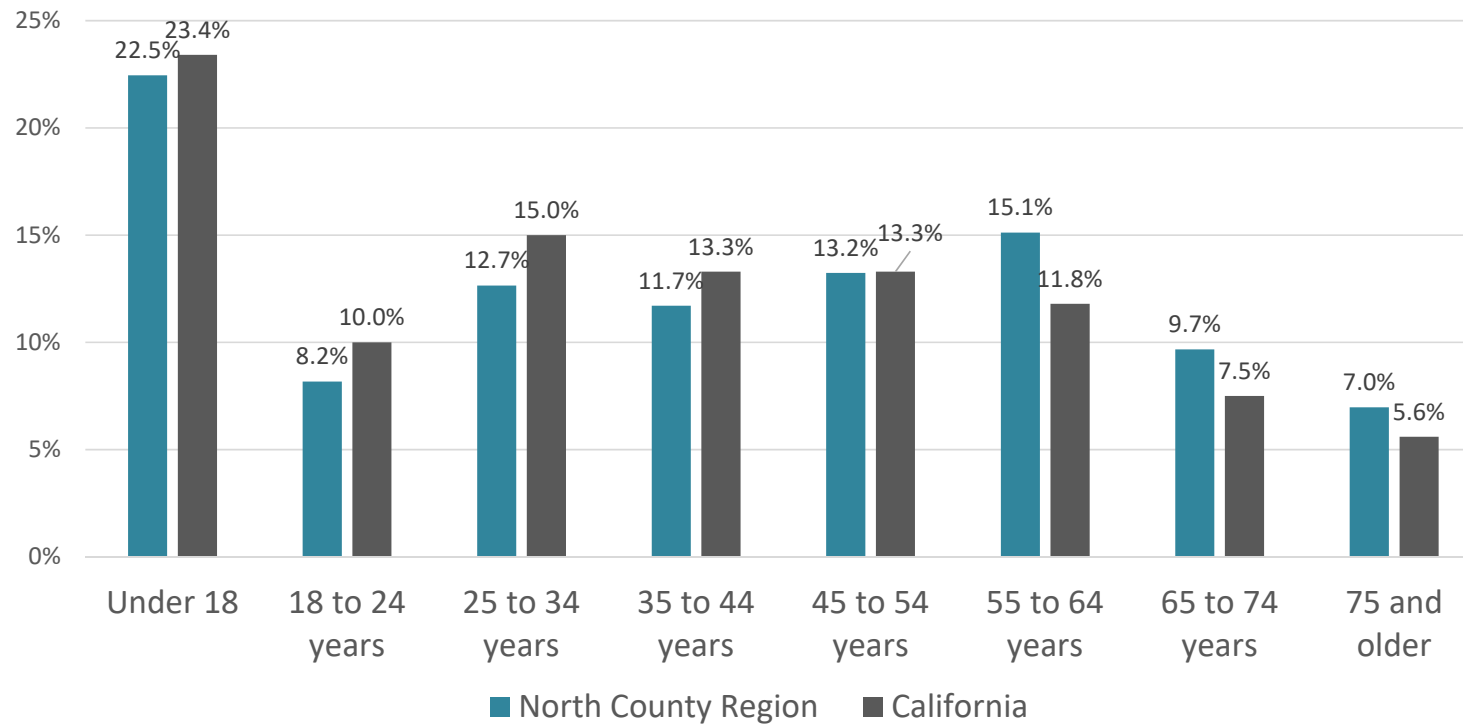
Regional Demographics and Characteristics

Population Change



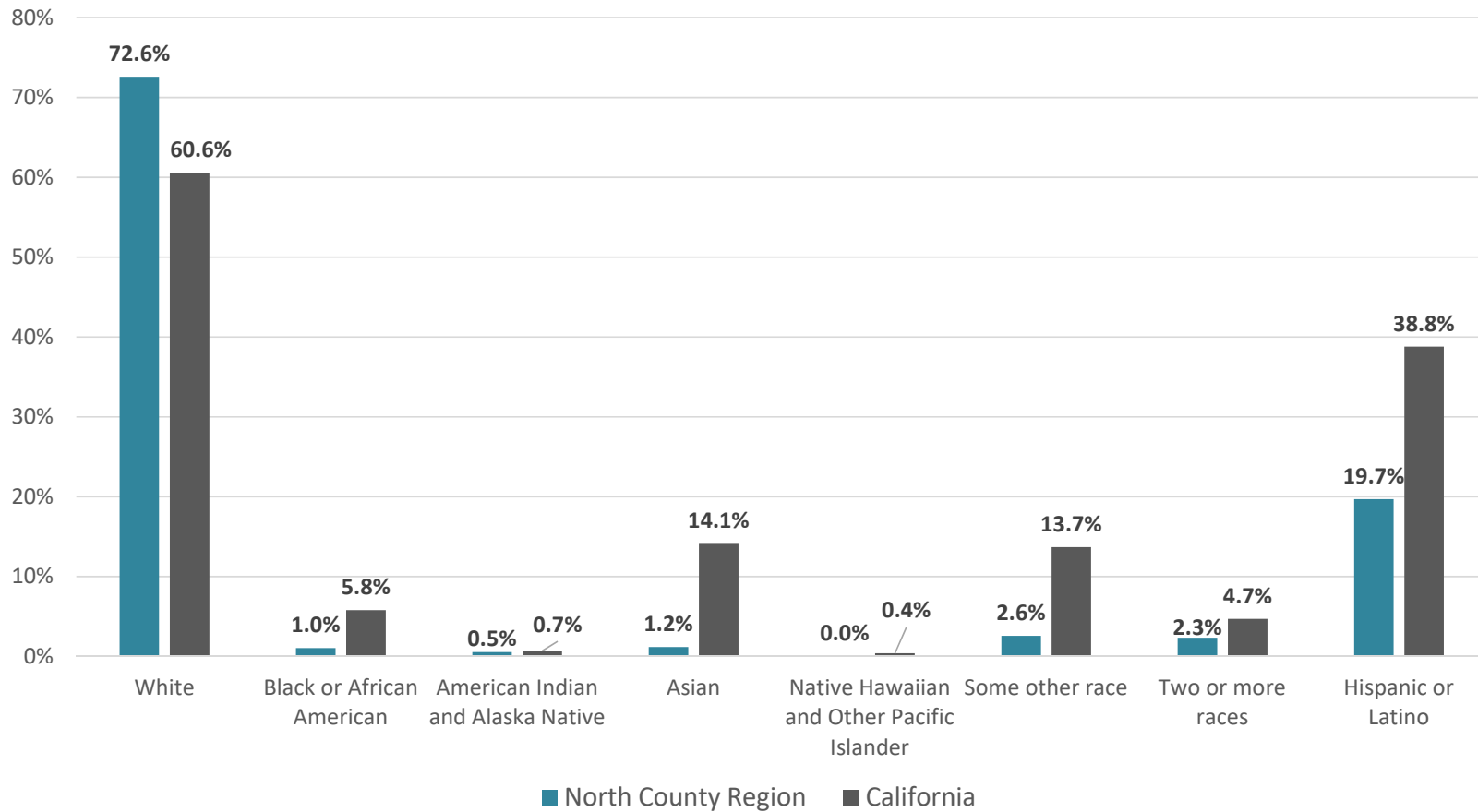
Regional Demographics and Characteristics

Age Distribution



Regional Demographics and Characteristics

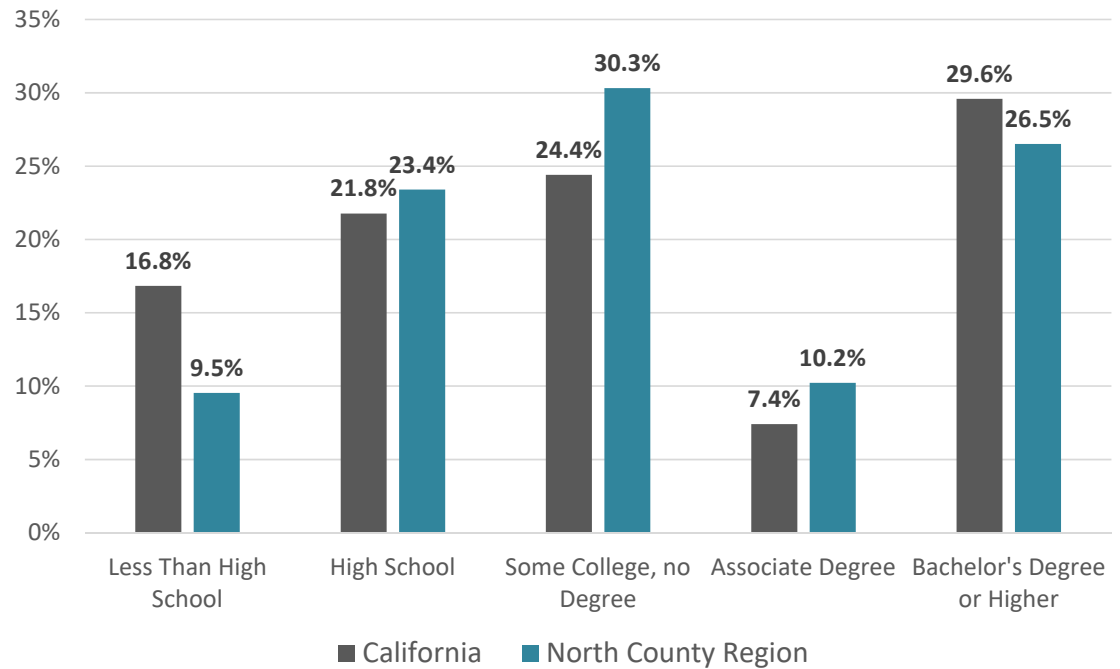
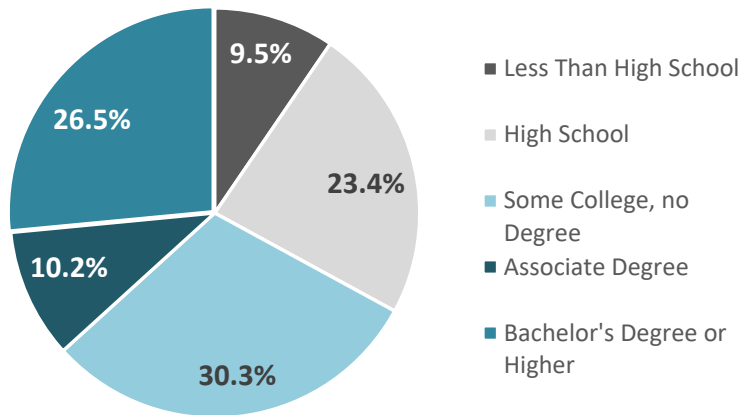
Race and Ethnicity



Regional Demographics and Characteristics

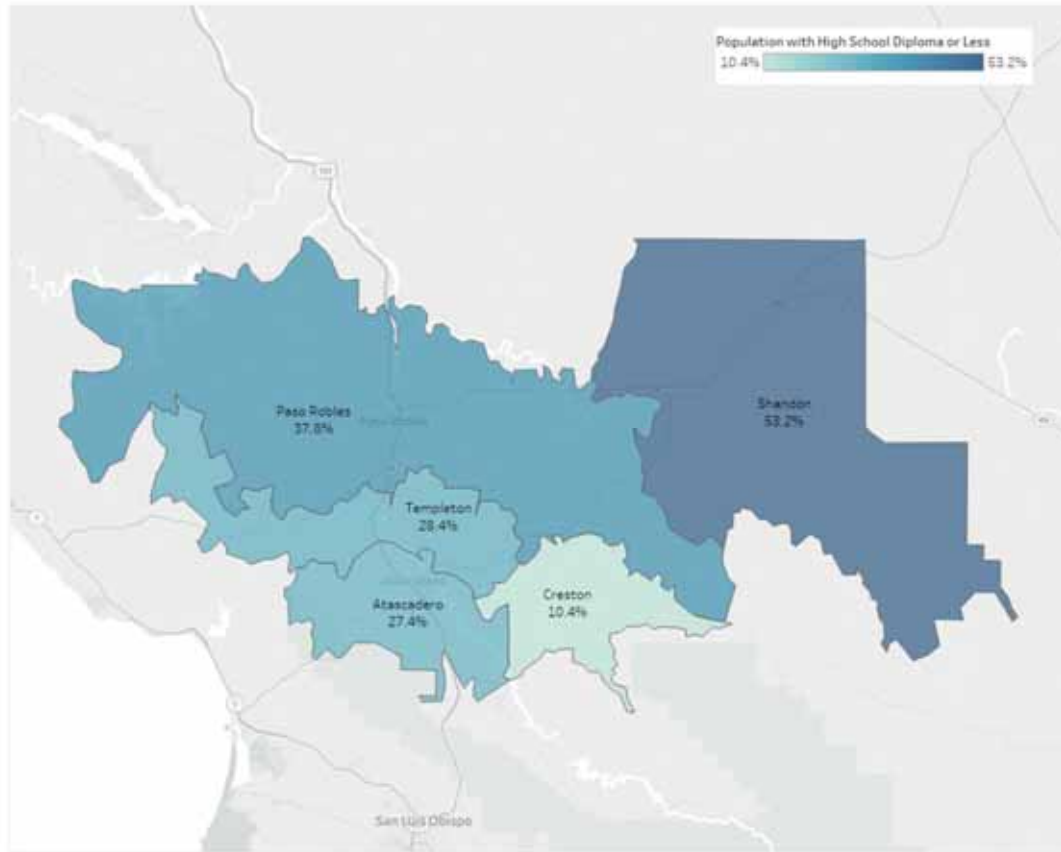
Educational Attainment

North County Region



Regional Demographics and Characteristics

Educational Attainment



Regional Demographics and Characteristics

Educational Attainment in SLO County (2017)

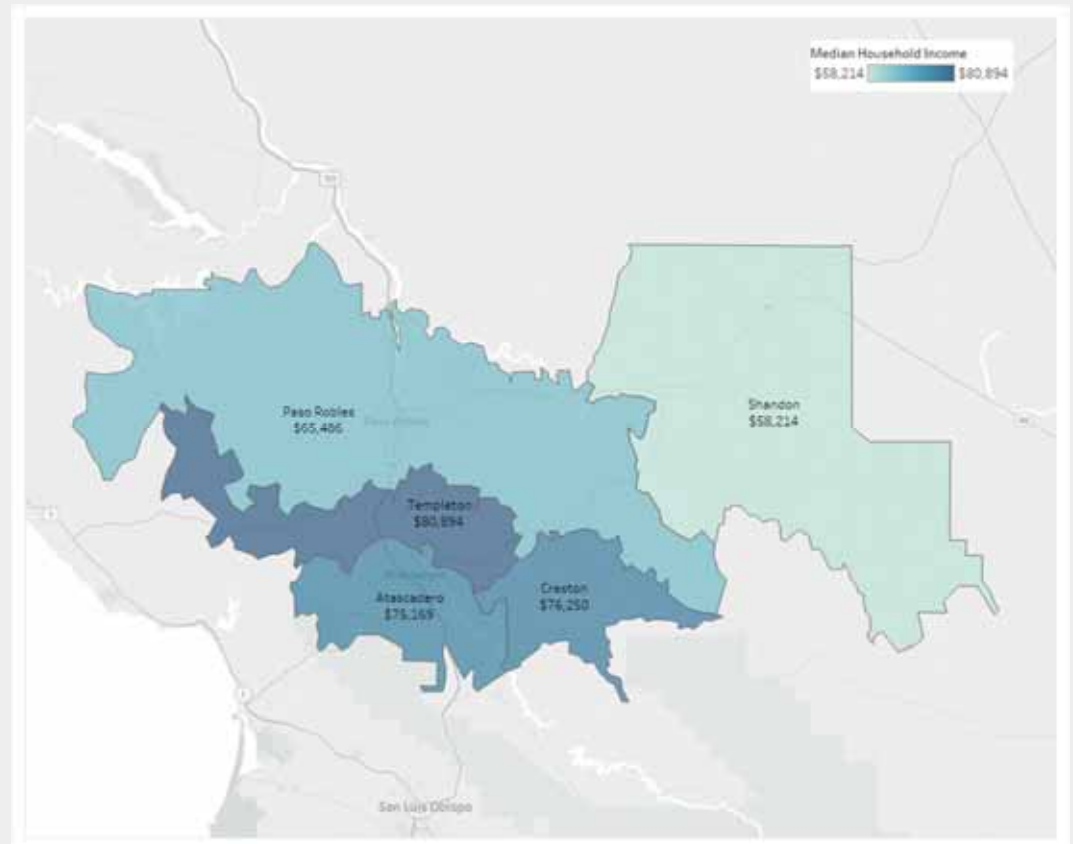
Institution	All Program Completions	Market Share	YOY Growth in Completions
California Polytechnic State University-San Luis Obispo	5,114	72.4%	2.4%
Cuesta College	1,422	20.1%	9.1%
Laurus College	248	3.5%	40.1%
Central California School of Continuing Education	160	2.3%	1.3%
Design's School of Cosmetology	115	1.6%	(14.2%)

Regional Demographics and Characteristics

Median Household Income

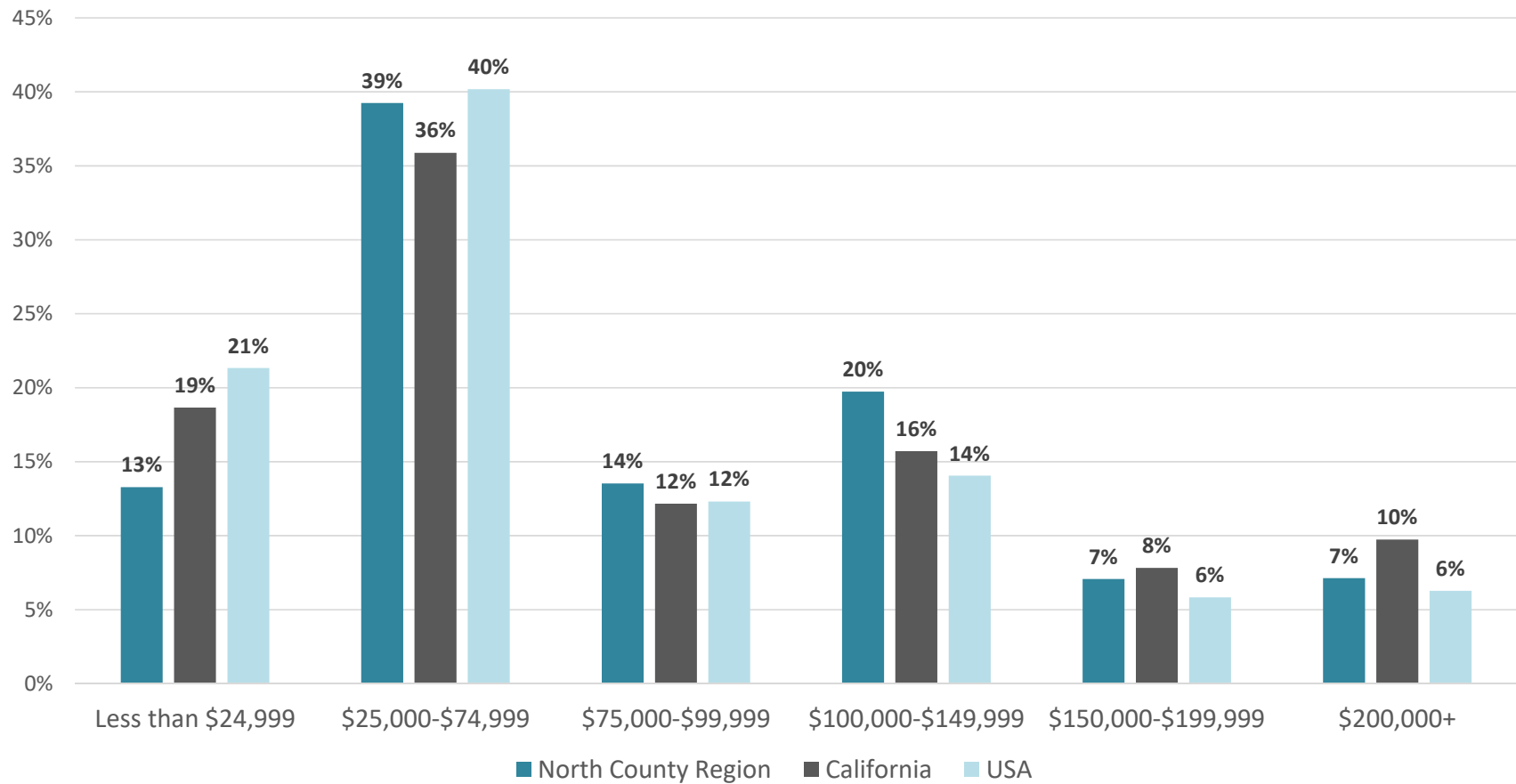
Median Household Income

North County Region	\$71,203
California	\$67,169
USA	\$57,652



Regional Demographics and Characteristics

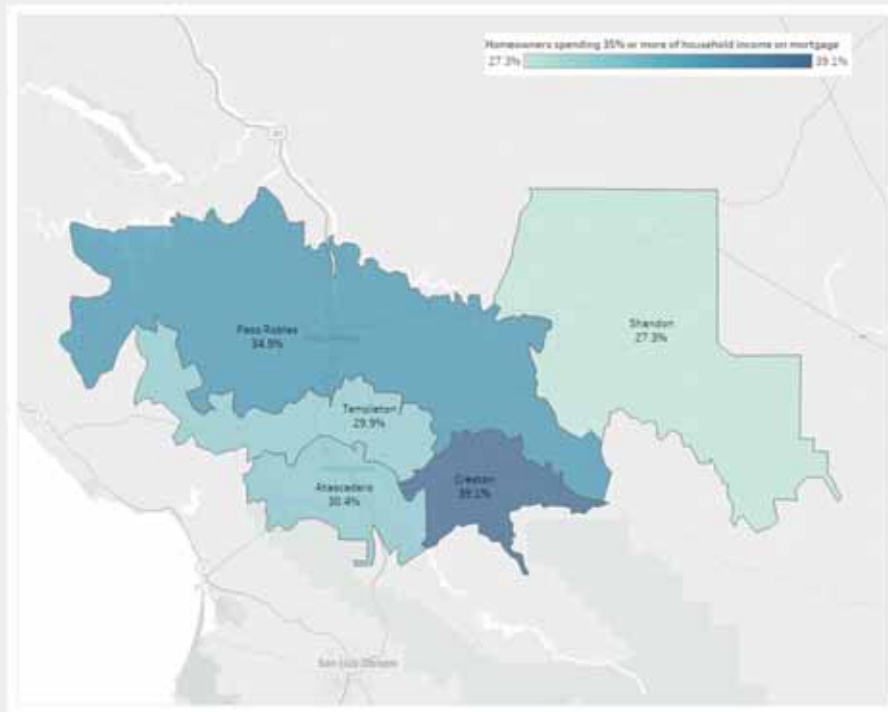
Household Income Distribution



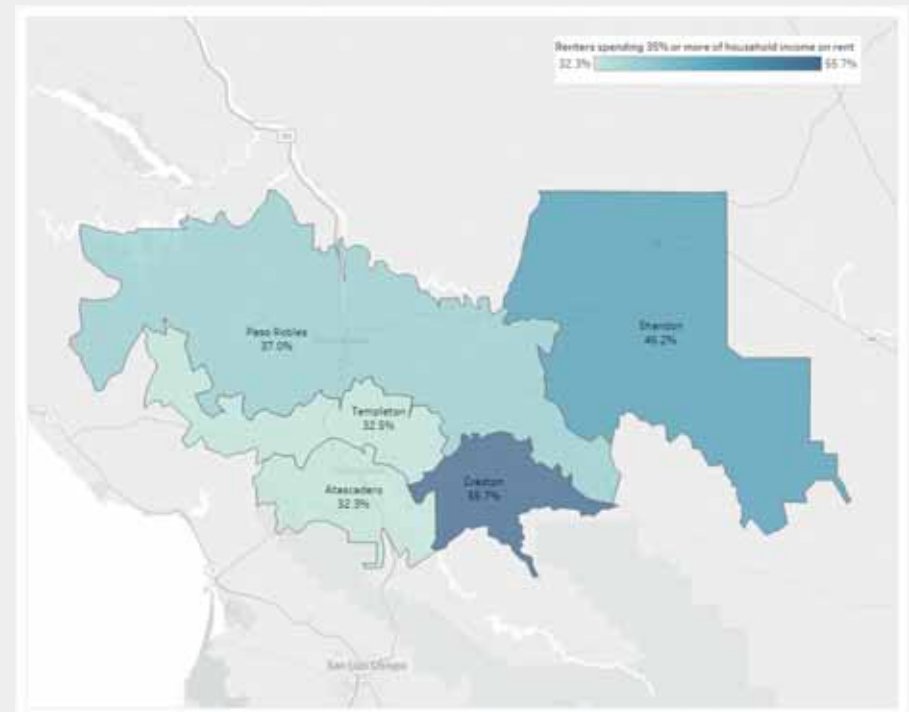
Regional Demographics and Characteristics

Housing Expenditures

Homeowners



Renters

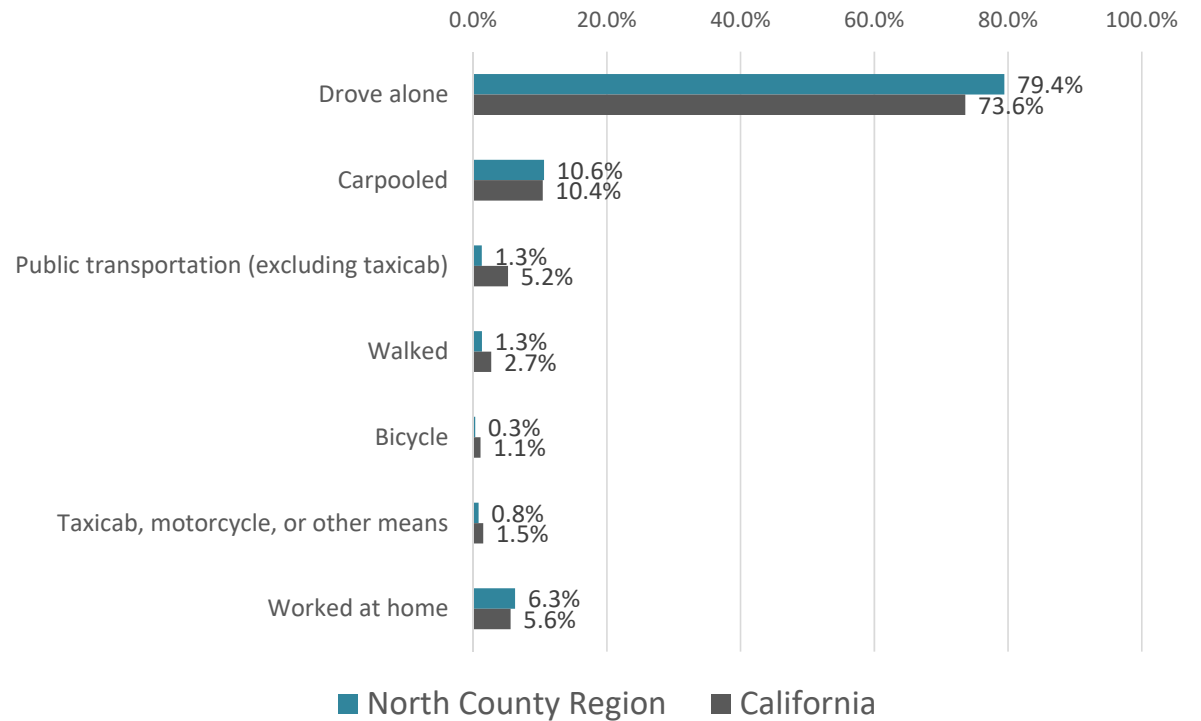


Regional Demographics and Characteristics

Commute Characteristics

Mean Travel Time

North County Region	24.3 minutes
California	28.8 minutes
USA	26.4 minutes





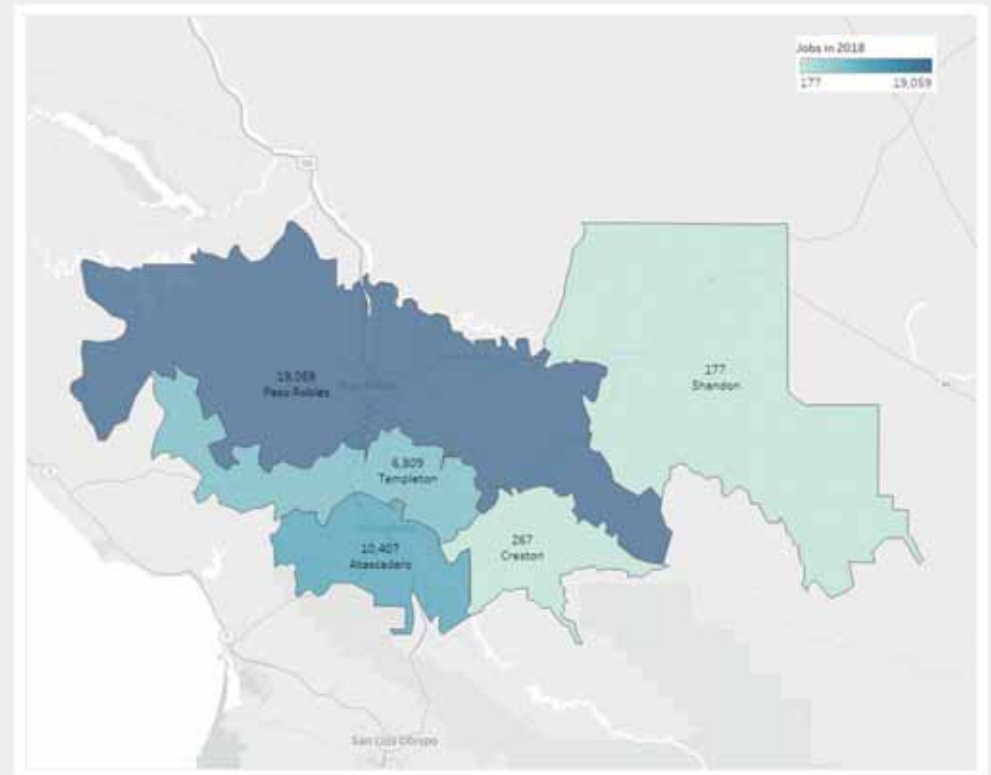
2

Economic, Industry, & Occupational Analysis

Regional Economic Profile

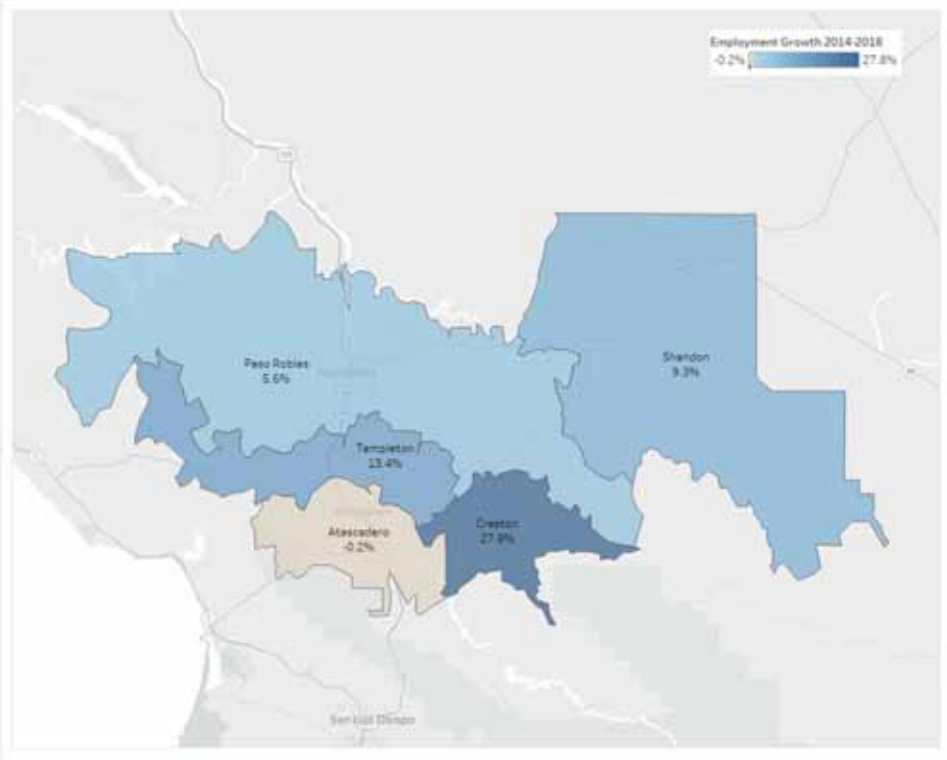
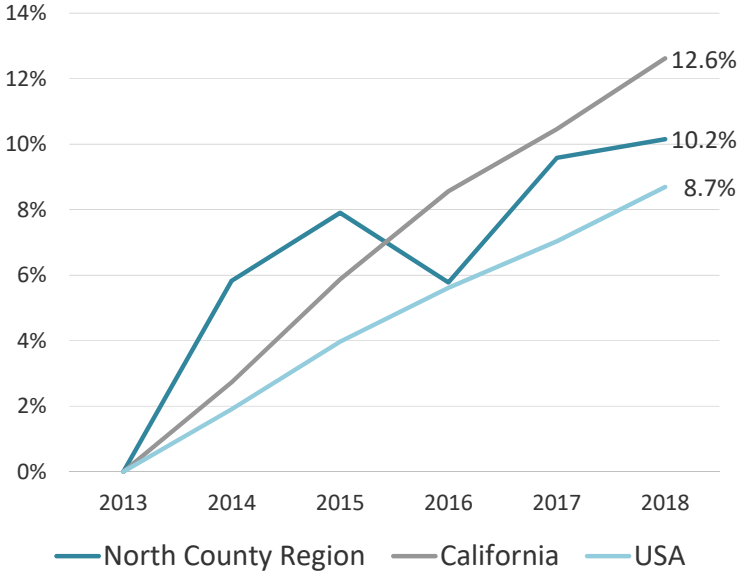
Employment 2018

Paso Robles	19,059	53.1%
Atascadero	10,431	29.1%
Templeton	6,005	16.7%
Creston	209	0.6%
Shandon	162	0.5%
<hr/>		
Overall	35,866	



Regional Economic Profile

Employment Growth (2013-2018)

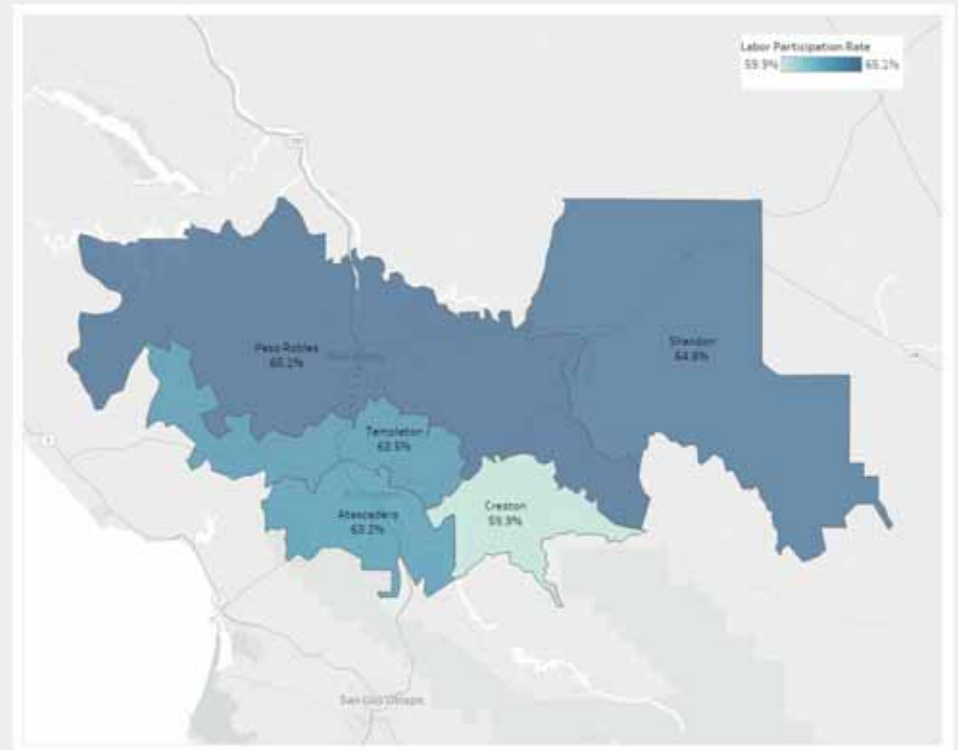


Labor Participation and Unemployment

California unemployment rate was 4.2% in June 2019

Region	June 2019 Unemployment Rate
Atascadero City	2.7%
El Paso de Robles (Paso Robles) City	2.8%
Lake Nacimiento CDP	2.2%
Shandon CDP	4.8%
Templeton CDP	1.4%
Overall	2.6%

North County Region Labor Participation Rate: 64.1% vs 63.5% Statewide

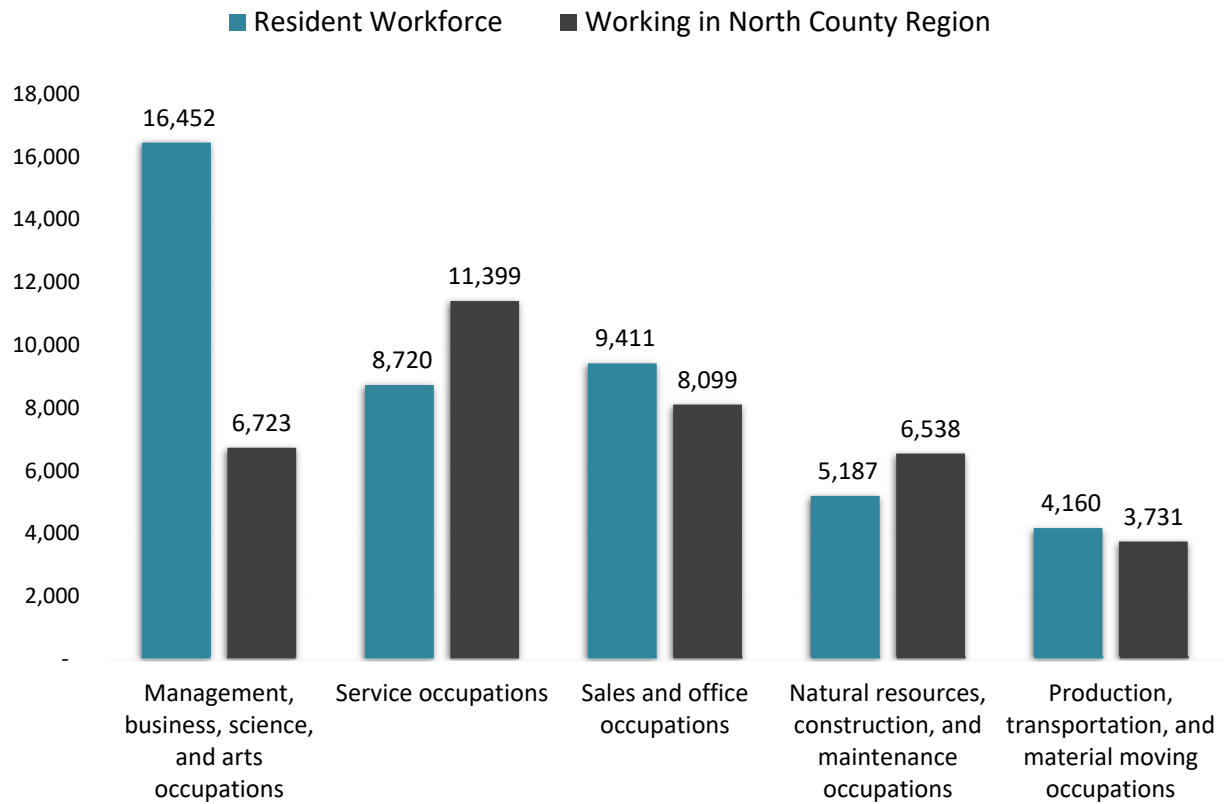


Regional Economic Profile

Regional Workforce

Net export of 7,400 jobs
(20.1%)

Primarily in management,
business, science, and arts
occupations



Regional Economic Profile

Job Quality

Tier 1

- **High-skill, high-wage**
- In 2018, median annual wage \$86,722 a year. The California median annual wage is \$99,280.
- Chief Executives, Sales Managers, Lawyers, Physicians, Scientists, Engineers, Computer Programmers, and Software Developers.

Tier 2

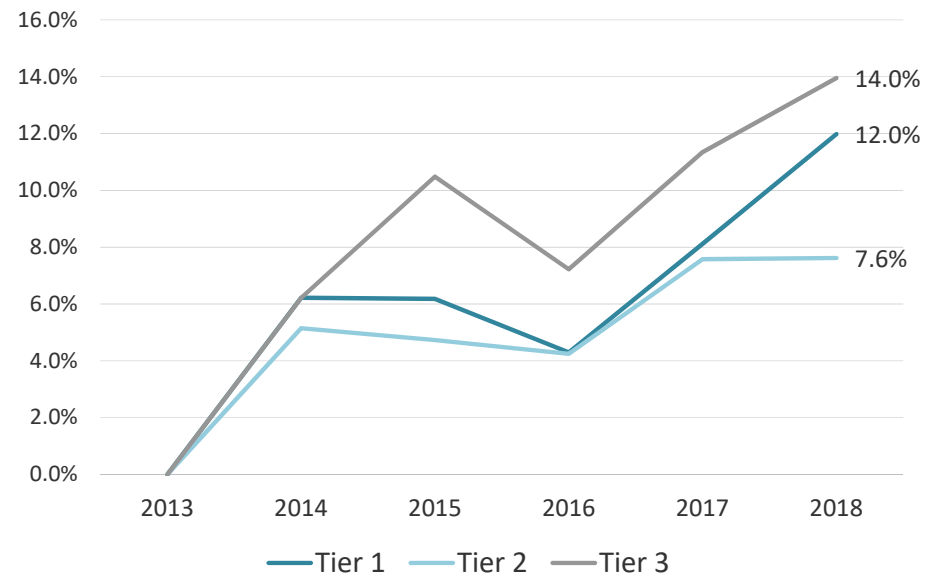
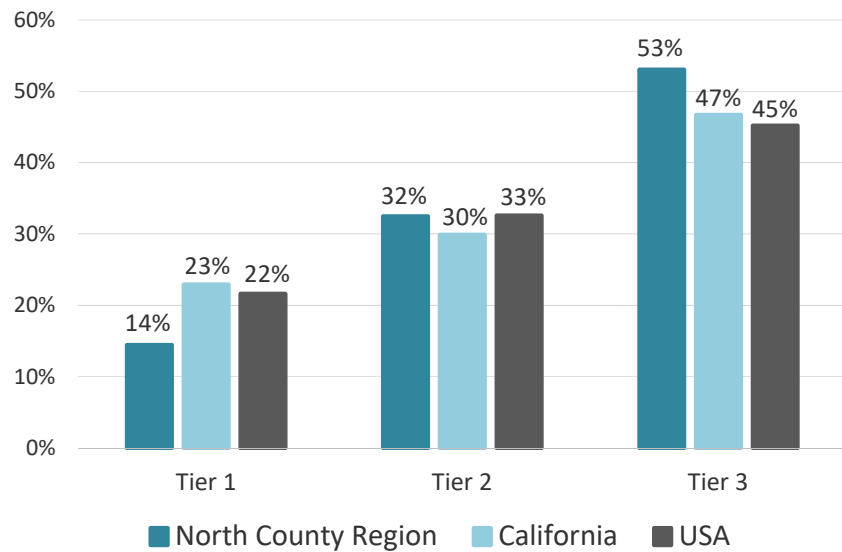
- **Middle-skill, middle-wage**
- In 2018, median annual wage \$51,380 a year. The California median annual wage is \$53,966.
- Technicians, Teachers, Accounting Clerks, Secretaries, Assemblers, Electricians, and Machinists.

Tier 3

- **Low-skill, low-wage**
- In 2018, median annual wage \$28,343 a year. The California median annual wage is \$30,114.
- Security guards, Food Service and Retail positions, Janitors, Home Health Aides, and Child Care Workers.

Regional Economic Profile

Job Quality



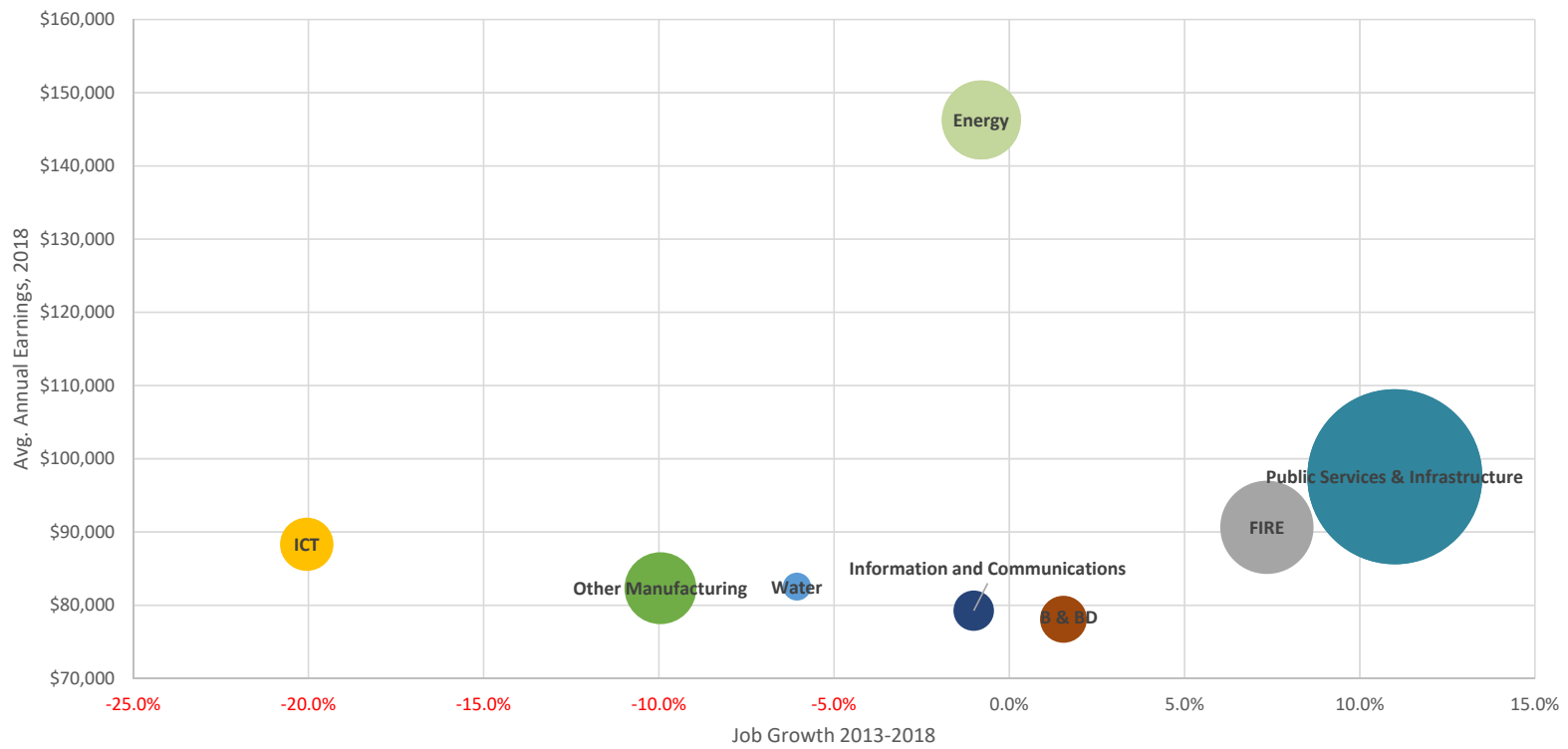
Entrepreneurship Activity in North County Region Region

Entrepreneurship activity in North County (2014 to 2016) is strong.

North County business birth rate was higher (4.2%) than the California or the national average

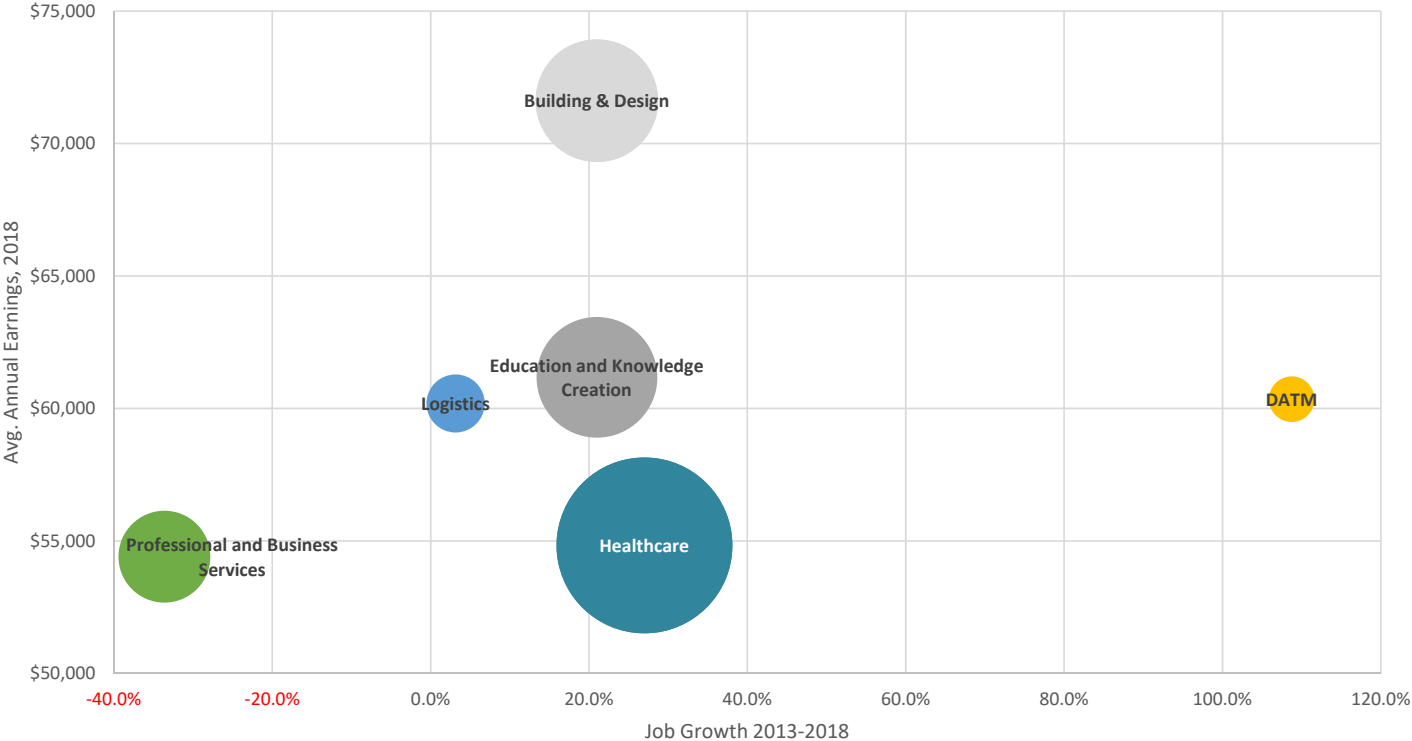
Regional Economic Profile

Higher-Income Industry Clusters



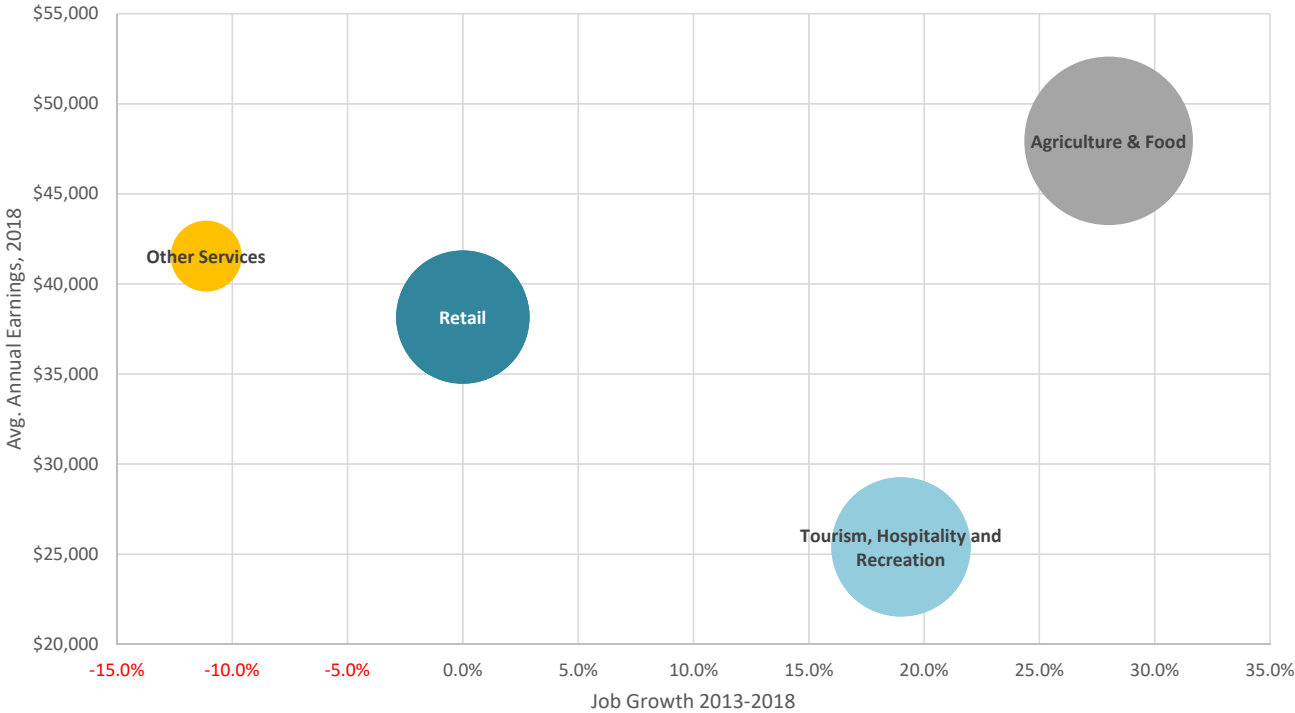
Regional Economic Profile

Middle-Income Industry Clusters



Regional Economic Profile

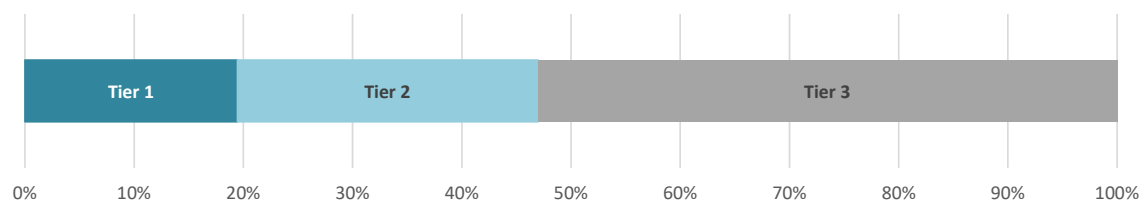
Lower-Income Industry Clusters



Regional Economic Profile

Selected Industry Cluster: Healthcare

Healthcare



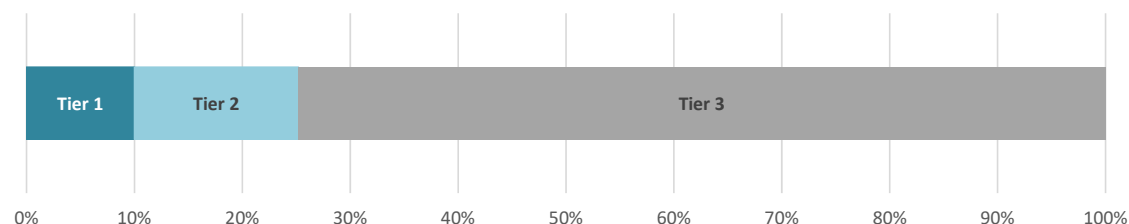
Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Services for the Elderly and Persons with Disabilities	1,845	78%	4.01	\$18,459
Hospitals (State Government)	1,141	9%	12.46	\$86,335
Offices of Physicians (except Mental Health Specialists)	671	9%	1.08	\$96,000
General Medical and Surgical Hospitals	346	18%	0.30	\$94,938
Assisted Living Facilities for the Elderly	287	2%	2.66	\$33,798

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Personal Care Aides	1,918	109%	\$12.09	High school diploma or equivalent	None
Registered Nurses	435	15%	\$50.15	Bachelor's degree	None
Psychiatric Technicians	419	14%	\$33.72	Postsecondary nondegree award	Less than 5 years
Medical Assistants	216	17%	\$18.64	Postsecondary nondegree award	None
Licensed Practical and Licensed Vocational Nurses	208	(5%)	\$26.70	Postsecondary nondegree award	None

Regional Economic Profile

Selected Industry Cluster: Agriculture and Food

Agriculture and Food Job Quality



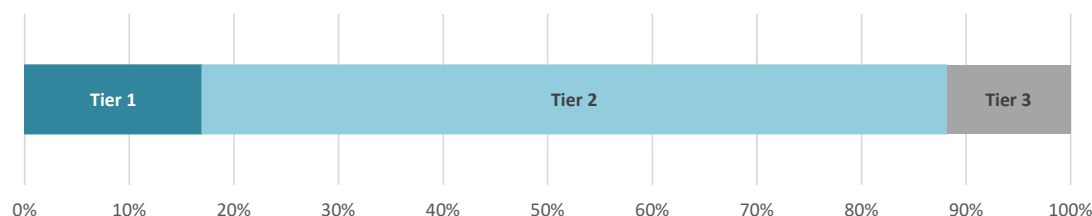
Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Farm Labor Contractors and Crew Leaders	1,940	59%	24.69	\$36,252
Wineries	1,745	54%	105.79	\$60,362
Crop Production	1,445	(15%)	10.81	\$47,990
Farm Management Services	737	73%	153.33	\$49,078
Veterinary Services	154	38%	1.63	\$42,710

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	2,172	24%	\$12.21	No formal educational credential	None
Agricultural Equipment Operators	292	49%	\$14.38	No formal educational credential	None
Farmers, Ranchers, and Other Agricultural Managers	275	(18%)	\$39.18	High school diploma or equivalent	5 years or more
Packaging and Filling Machine Operators and Tenders	271	57%	\$13.93	High school diploma or equivalent	None
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	264	100%	\$14.93	High school diploma or equivalent	None

Regional Economic Profile

Selected Industry Cluster: Building and Design

Building and Design



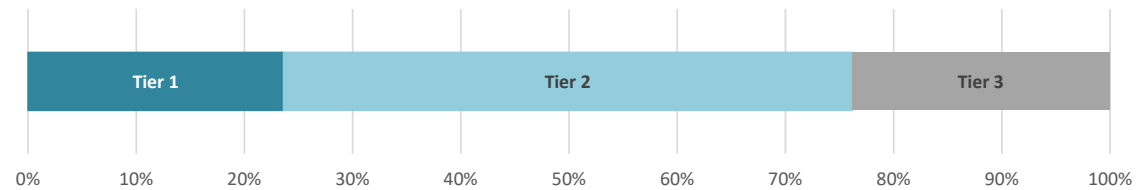
Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Site Preparation Contractors	508	22%	5.97	\$103,550
Plumbing, Heating, and Air-Conditioning Contractors	295	48%	1.08	\$66,774
New Single-Family Housing Construction (except For-Sale Builders)	204	38%	2.26	\$62,163
Drywall and Insulation Contractors	179	57%	2.85	\$48,989
Electrical Contractors and Other Wiring Installation Contractors	151	(2%)	0.66	\$84,141

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Construction Laborers	326	41%	\$19.20	No formal educational credential	None
Carpenters	243	47%	\$25.98	High school diploma or equivalent	None
Painters, Construction and Maintenance	126	(3%)	\$21.10	No formal educational credential	None
First-Line Supervisors of Construction Trades and Extraction Workers	112	38%	\$33.37	High school diploma or equivalent	5 years or more
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	98	63%	\$22.85	Postsecondary nondegree award	None

Regional Economic Profile

Selected Industry Cluster: Public Services & Infrastructure

Public Services & Infrastructure



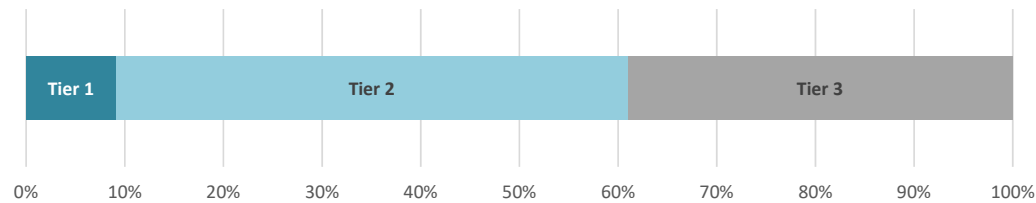
Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Local Government, Excluding Education and Hospitals	1,915	9%	1.37	\$102,142
State Government, Excluding Education and Hospitals	1,341	15%	2.44	\$94,913
Highway, Street, and Bridge Construction	138	331%	1.67	\$99,277
US Postal Service	104	6%	0.70	\$70,401
Federal Government, Civilian, Excluding Postal Service	92	(30%)	0.17	\$93,296

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Correctional Officers and Jailers	335	12%	\$42.35	High school diploma or equivalent	None
Firefighters	198	14%	\$26.31	Postsecondary nondegree award	None
Police and Sheriff's Patrol Officers	196	9%	\$46.82	High school diploma or equivalent	None
Office Clerks, General	88	14%	\$15.48	High school diploma or equivalent	None
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	81	19%	\$20.18	High school diploma or equivalent	None

Regional Economic Profile

Selected Industry Cluster: Education and Knowledge Creation

Education and Knowledge Creation



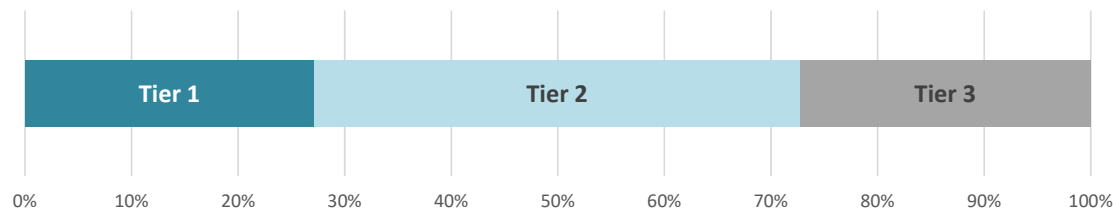
Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Elementary and Secondary Schools (Local Government)	1,984	8%	1.13	\$73,176
Educational Support Services	290	-	7.69	\$15,758
Child Day Care Services	211	35%	0.94	\$30,862
Elementary and Secondary Schools	87	(42%)	0.32	\$38,935
Fine Arts Schools	33	43%	1.37	\$11,884

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Middle School Teachers, Except Special and Career/Technical Education	504	6%	\$29.07	Bachelor's degree	None
Teacher Assistants	363	31%	\$14.14	Some college, no degree	None
Substitute Teachers	264	6%	\$17.21	Bachelor's degree	None
Secondary School Teachers, Except Special and Career/Technical Education	231	14%	\$34.21	Bachelor's degree	None
Elementary School Teachers, Except Special Education	227	5%	\$34.46	Bachelor's degree	None

Regional Economic Profile

Selected Industry Cluster: Finance, Insurance, Banking, and Real Estate (F.I.R.E.)

F.I.R.E.



Industries	2018 Jobs	% Change 2013-2018	Location Quotient	Avg Earnings per Job
Commercial Banking	236	(18%)	0.74	\$120,067
Insurance Agencies and Brokerages	136	18%	0.51	\$77,255
All Other Nondepository Credit Intermediation	85	193%	5.07	\$113,231
Offices of Real Estate Agents and Brokers	83	2%	0.98	\$68,947
Credit Unions	79	39%	1.20	\$70,862

Occupations	2018 Jobs	% Change 2013-2018	Median Hourly Earnings	Typical Entry Level Education	Work Experience
Tellers	115	(14%)	\$15.74	High school diploma or equivalent	None
Securities, Commodities, and Financial Services Sales Agents	97	52%	\$23.71	Bachelor's degree	None
Insurance Sales Agents	92	18%	\$22.18	High school diploma or equivalent	None
Loan Officers	57	12%	\$32.48	Bachelor's degree	None
Counter and Rental Clerks	46	10%	\$14.72	No formal educational credential	None



3

Things to Consider



Key Challenges

1. Economic Insecurity
2. The QoL (Sunshine) Tax
3. Industry Profile

Things to Consider

Economic Insecurity

- Poverty rate in North County region is 9.5% but an incomplete measure for those that are struggling to get by.
- A family of four (2 adults and 2 children, one adult working) living in SLO County requires \$52,720 annually to stay at or above self-sufficiency.

	Median Annual Wage	Number of Jobs to Meet Family Self-Sufficiency
Tier 1	\$86,722	0.61
Tier 2	\$51,380	1.03
Tier 3	\$28,343	1.86

Things to Consider
The QoL Tax

Cost of Living



14%

Above
National Average

Average Wages

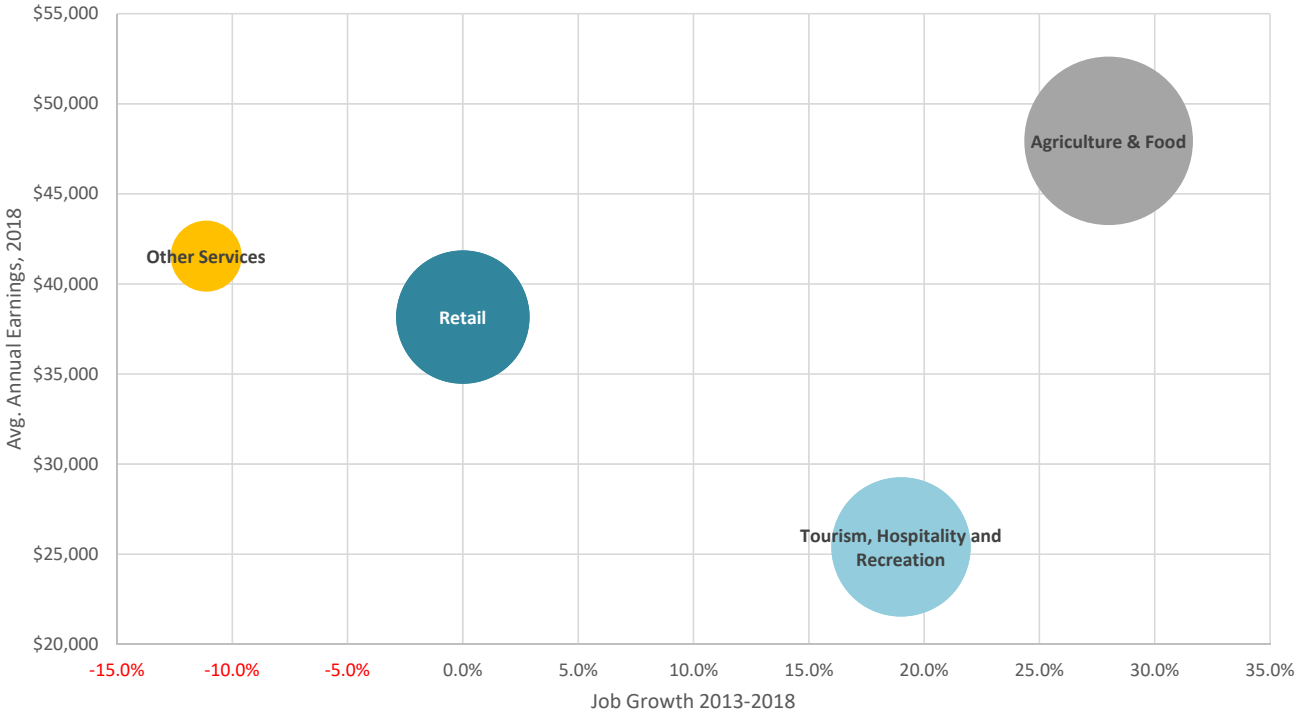


16%

Below
National Average

Regional Economic Profile

Lower-Income Industry Clusters





Key Opportunities

1. Entrepreneurship and growth in Wineries
2. Quality of Life
3. Robust Growth in Key Industry Segments (Building and Design, Healthcare, and Education increased by ~20%)
4. Economic Resiliency & Diversity

Key Industry Cluster Growth in North County

The following industry clusters grew by more than 20% in North County (2013 to 2018) and offer a healthy mix of tier 1, 2, & 3 jobs;

- **Healthcare** (27%, 5,698 jobs, 4.36 LQ)
- **Building & Design** (21%, 2,768, 2.67 LQ)
- **Education & Knowledge Creation** (21%, 2,685, 2.46 LQ)

Things to Consider

Economic Resiliency & Diversity

Regional Economic Resilience (Brookings, GWU & Urban Institute, 2010 & BW Research 2019)

- **Industry structure has an impact on economic resilience** (Healthcare & Education more resilient, Durable manufacturing less resilient).
- **More export-oriented industries** makes a region less likely to experience a downturn
- Regions in which a large share of the **population has low levels of formal schooling** (HS diploma or less) are more susceptible to downturns
- Regions with large income gaps or **higher income inequality** are more susceptible to downturn