



External Environmental Scan

January 28, 2025

Data and Trends

NATIONAL, STATE, REGIONAL



National Trends



Social

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

*Excerpted from 2024 EDUCAUSE Horizon Report:
Teaching and Learning Edition*

National Trends

Technological

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

*Excerpted from 2024 EDUCAUSE Horizon Report:
Teaching and Learning Edition*



National Trends



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

*Excerpted from 2024 EDUCAUSE Horizon Report:
Teaching and Learning Edition*

National Trends

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



*Excerpted from 2024 EDUCAUSE Horizon Report:
Teaching and Learning Edition*

National Trends



Political

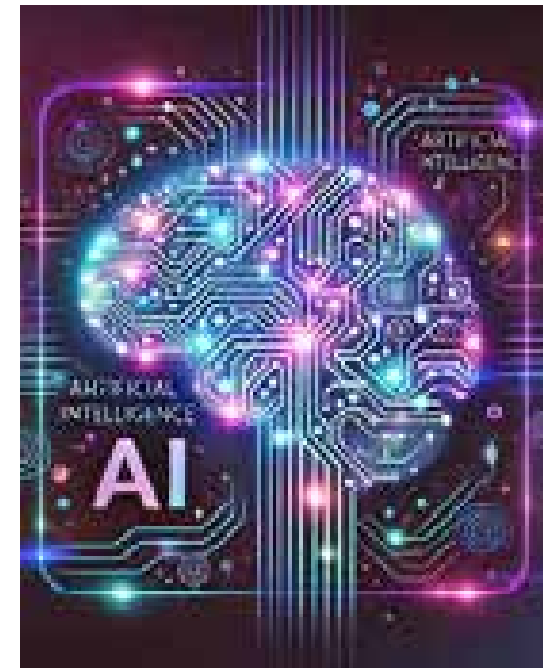
- Political **polarization** in the United States continues to impact higher education
- Government **policy** is increasingly influencing education
- The need is growing for policies that address **emerging technologies**

*Excerpted from 2024 EDUCAUSE Horizon Report:
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National Trends

Artificial Intelligence

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



*Excerpted from 2024 EDUCAUSE Horizon Report:
Teaching and Learning Edition*

An aerial photograph of a town, likely in the San Francisco Peninsula, with prominent mountains in the background. The town features a mix of residential and commercial buildings, green spaces, and a large parking lot in the foreground. The word "Thoughts?" is overlaid in the center.

Thoughts?



External Initiatives

State Trends

California Community Colleges Initiatives

Vision for Success

- Guided Pathways
- Student Centered Funding Formula

Governor's Roadmap for CCCs

Vision 2030



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

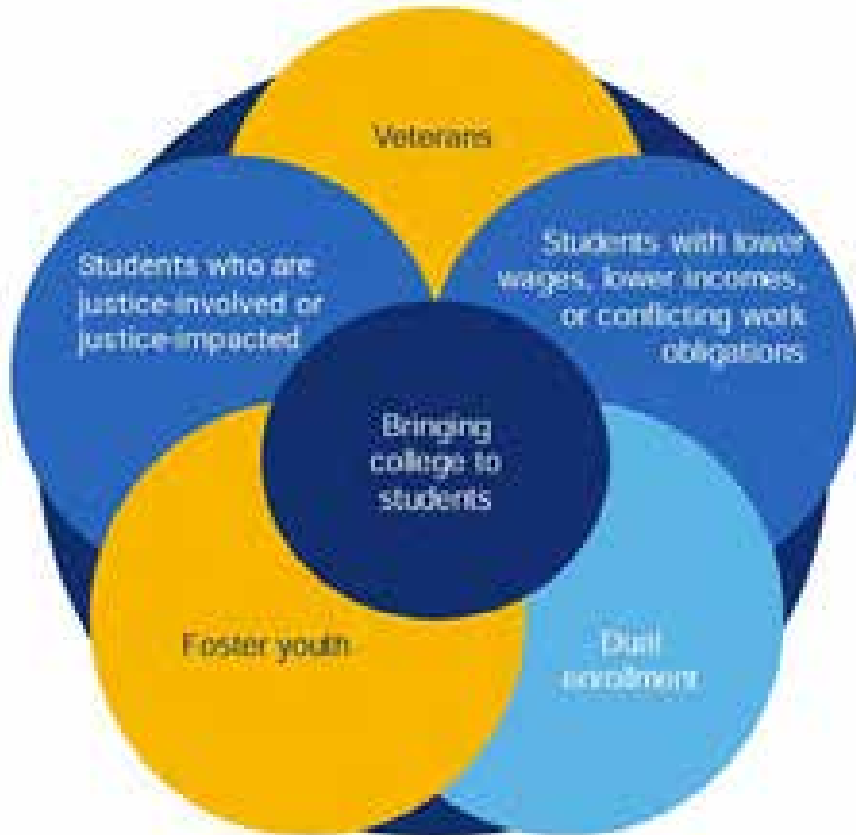


Source: California Community Colleges Chancellor's Office, Vision 2030, October 16, 2023

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

1. Boost **data-informed decision-making** 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: CCCCCO

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 [Strong Workforce 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 [REACH 2030](#): 10 Year Action Plan for Central Coast job creation (includes both San Luis Obispo and Santa Barbara Counties)

REACH
Ideas + Action for a Thriving Central Coast



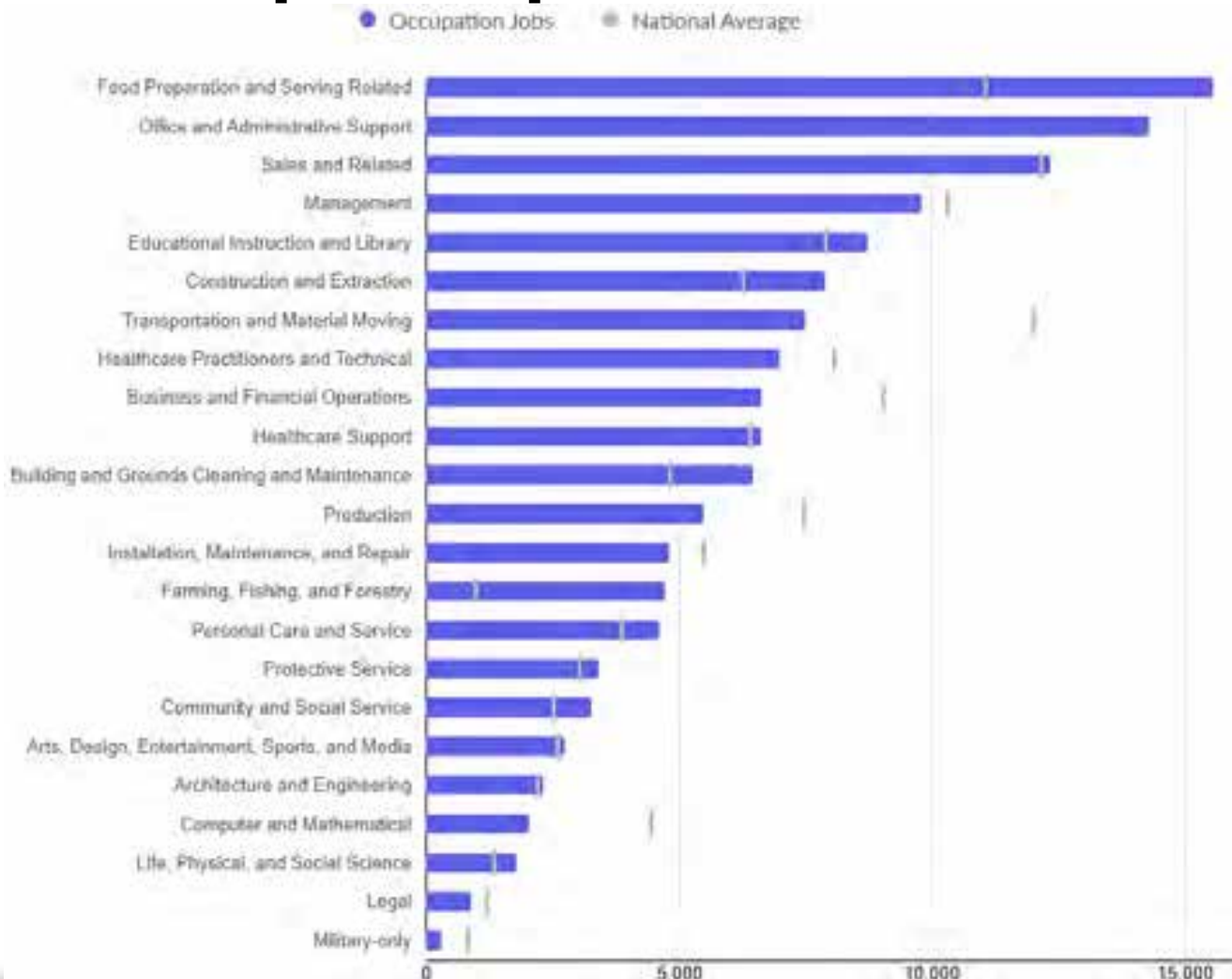
Labor Market Information

Top Industries, SLO County, 2023



Source: Lightcast

Top Occupations, SLO County, 2023



Source: Lightcast

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 Nursing	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 C	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

Source: Lightcast

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

Source: Lightcast

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

Source: Lightcast

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

Source: Lightcast

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 [Forbes](#)



Thoughts?



Cuesta College's Service Area: San Luis Obispo County

San Luis Obispo County

Population

San Luis Obispo	48,084
Paso Robles	30,882
Atascadero	30,393
Arroyo Grande	18,033
Grover Beach	12,544
Morro Bay	10,339
Pismo Beach	7,914
Unincorporated areas	121,883
Total County Population	280,072



Source: CA Department of Finance, 2023 estimates

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

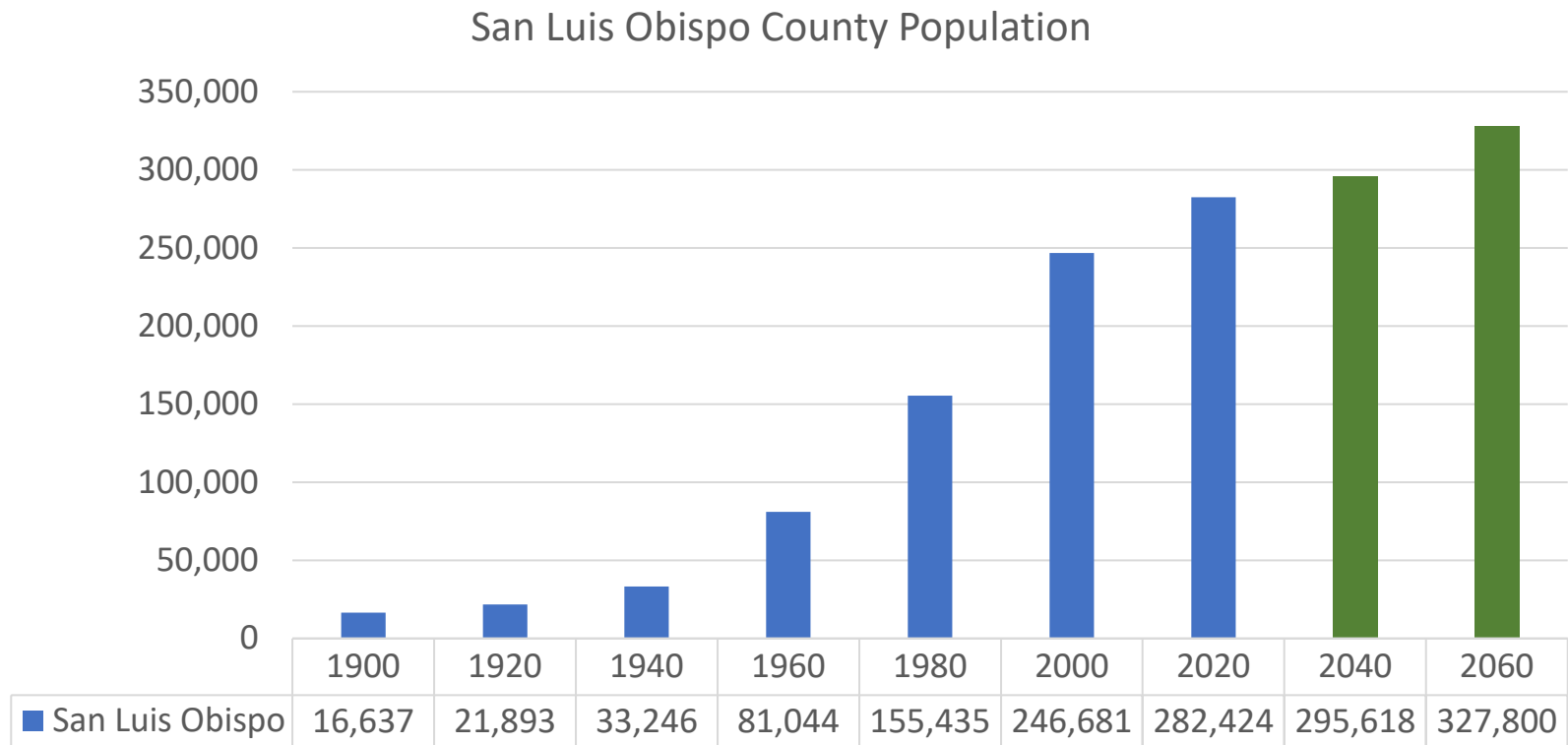


• Paso Robles	2,014
• San Luis Obispo	1,963
• Atascadero	1,310
• Arroyo Grande	986
• Nipomo	548
• Los Osos	511
• Templeton	466
• Morro Bay	429
• Grover Beach	394
• Santa Maria*	273
• Oceano	245
• San Miguel	189
• Cambria	169
• Pismo/Shell Beach	162

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

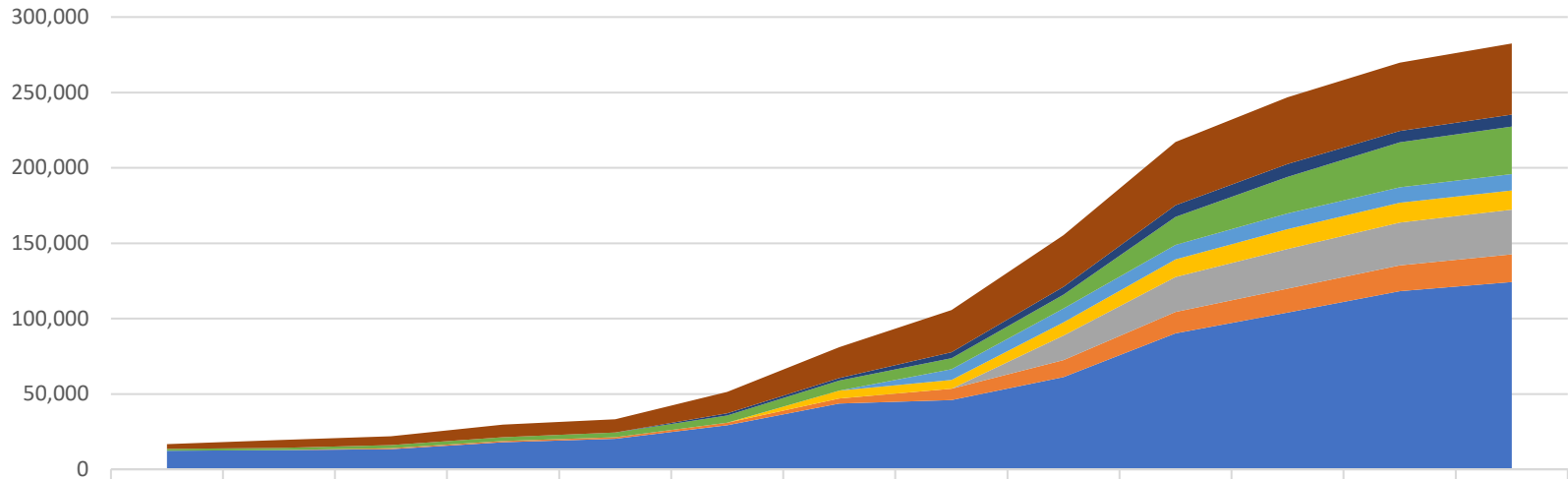
Data Source: [CCCCO](#) and [Map](#): Foundation for CCCs

Population of San Luis Obispo County, Historic and Projected



Source: California Department of Finance

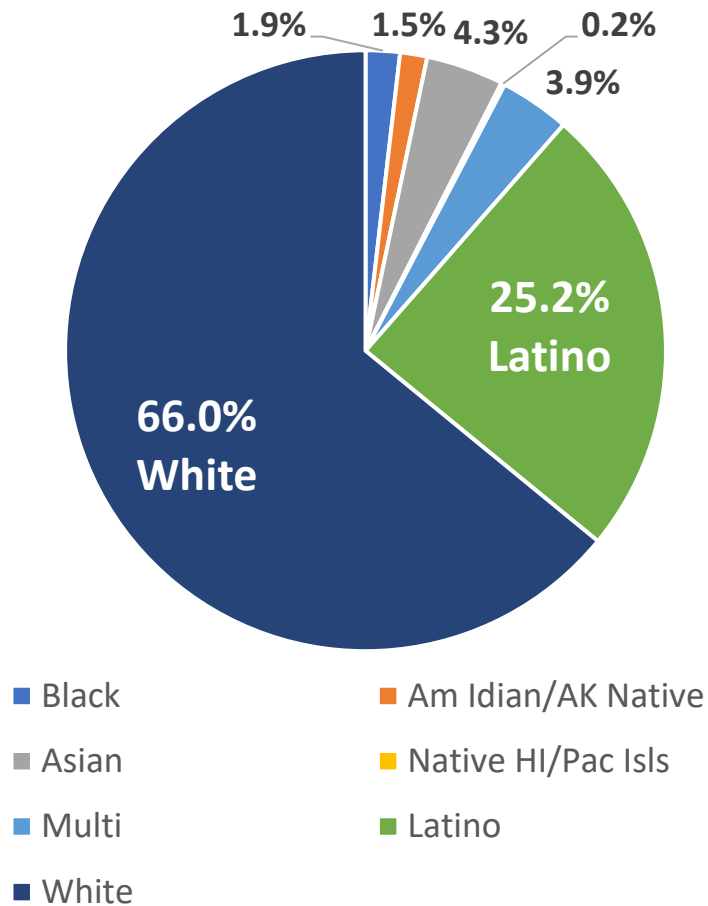
Historic Population of San Luis Obispo County, by Town/City, 1900-2020



	1900	1910	1920	1930	1940	1950	1960	1970	1980	1990	2000	2010	2020	% Change 1980-2020
San Luis Obispo	3,021	5,157	5,895	8,276	8,881	14,180	20,437	28,036	34,252	41,958	44,174	45,119	47,063	37.4%
Pismo Beach						1,425	1,762	4,043	5,364	7,669	8,551	7,655	8,072	50.5%
Paso Robles	1,224	1,441	1,919	2,573	3,045	4,835	6,677	7,168	9,163	18,583	24,297	29,793	31,490	243.7%
Morro Bay								7,109	9,064	9,664	10,350	10,234	10,757	18.7%
Grover Beach							5,210	5,939	8,827	11,656	13,067	13,156	12,701	43.9%
Atascadero									16,232	23,138	26,411	28,310	29,773	83.4%
Arroyo Grande			760	892	1,090	1,723	3,291	7,454	11,290	14,378	15,851	17,252	18,441	63.3%
Unincorporated	12,392	12,785	13,319	17,872	20,230	29,254	43,667	45,941	61,243	90,116	103,980	118,118	124,127	102.7%

Source: [CA Department of Finance](#), Historical Census Populations Notes:

SLO County Population by Ethnicity, 2023



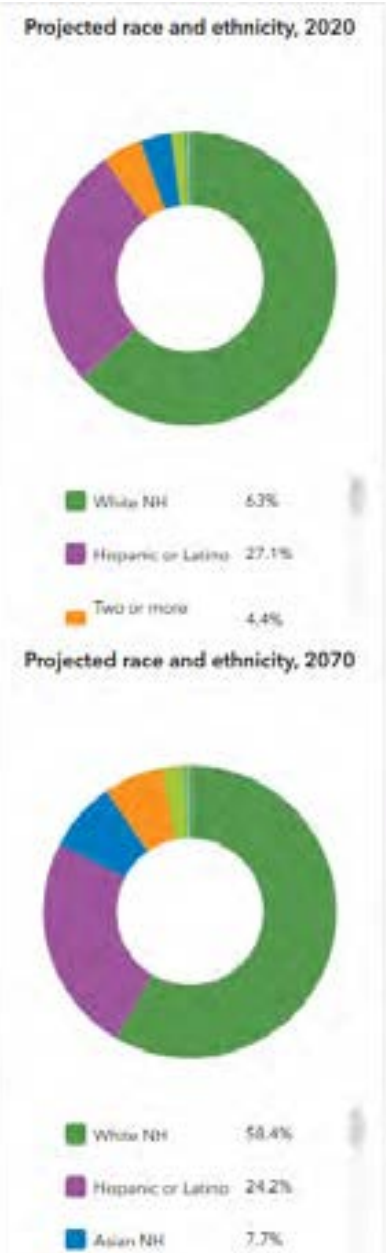
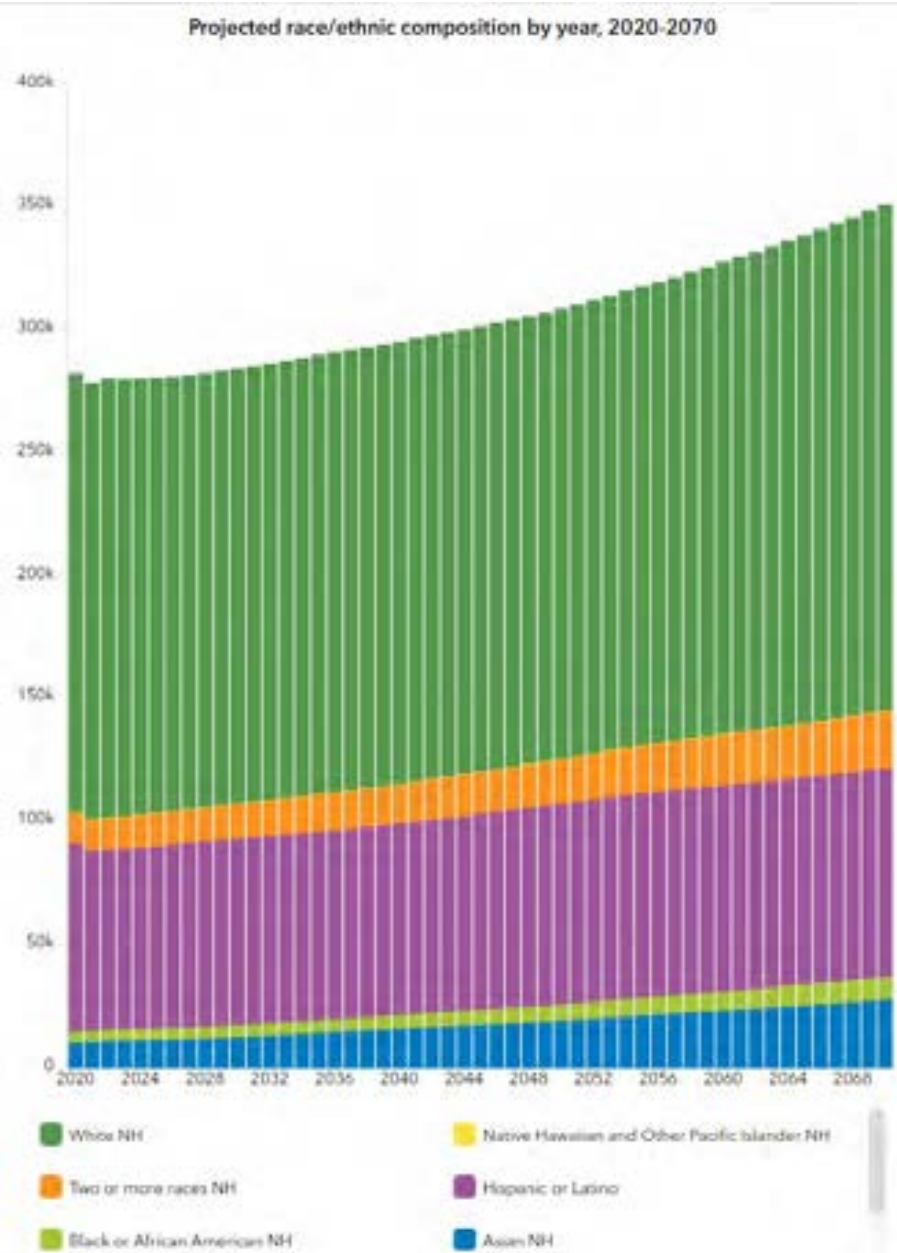
- The majority (approximately two-thirds) of San Luis Obispo County Residents in 2023 were **White**
 - Down from 81% in 1990
- One-quarter of county residents in 2023 were **Latino**
 - Up from 13% in 1990
- The next largest ethnic groups in 2023 were Asian (4.3%), Multi (3.9%), Black (1.9%) and American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

Source: CA Department of Finance, Population Projections 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

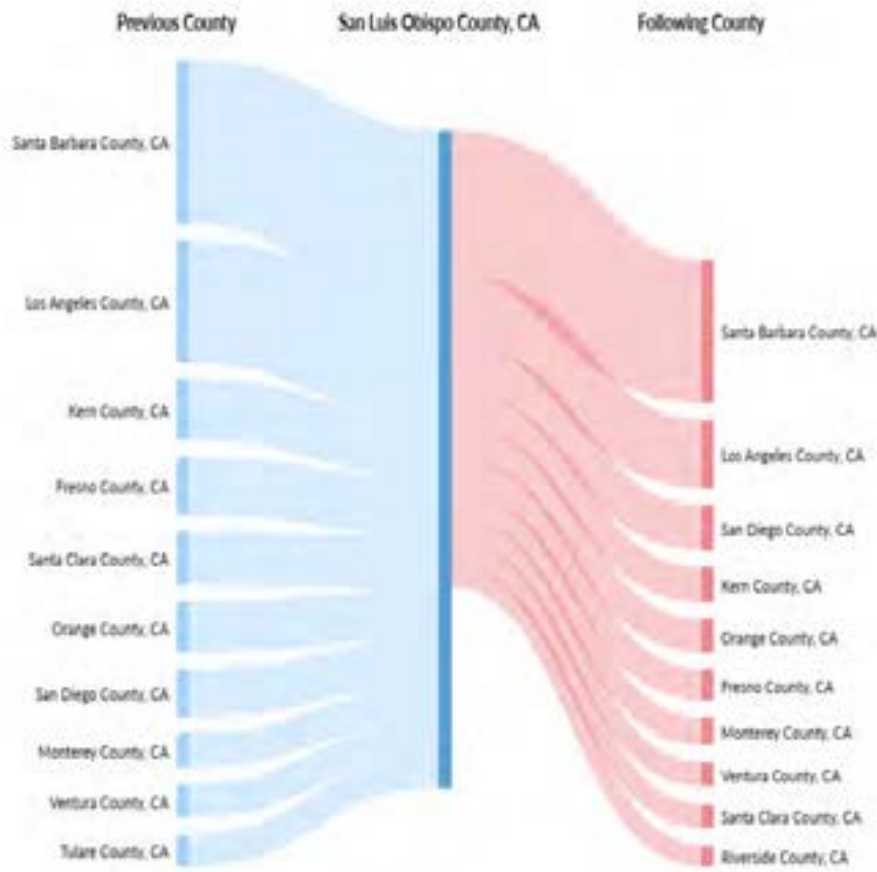
< -21.2 - 0

-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

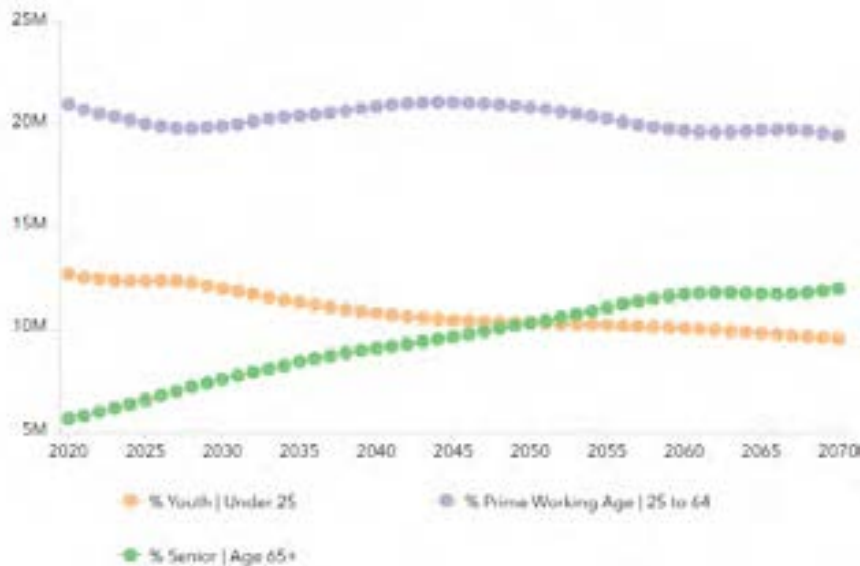
In 2022, SLO County experienced a net loss of **390** residents

Source: Lightcast

Projected Population by Age, 2020-2070

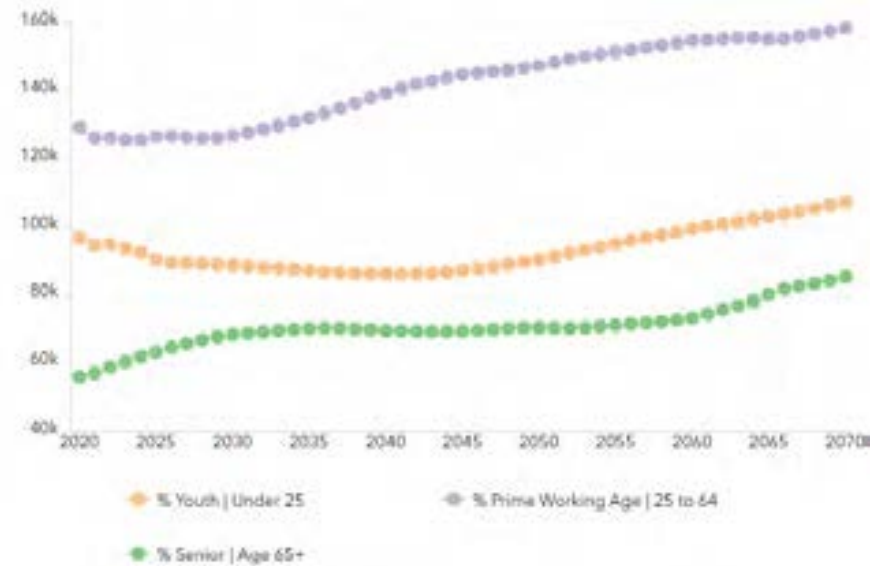
California

Projected population by age group, 2020 to 2070



San Luis Obispo County

Projected population by age group, 2020 to 2070



Source: CA Department of Finance, Population Projections 2024

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%

Source: US Census

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%

Source: US Census

Service Area Population Demographics Compared

	Atascadero	El Paso de Robles	San Luis Obispo (city)	San Luis Obispo County	California	United 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%

Source: US Census

Service Area Population Demographics Compared

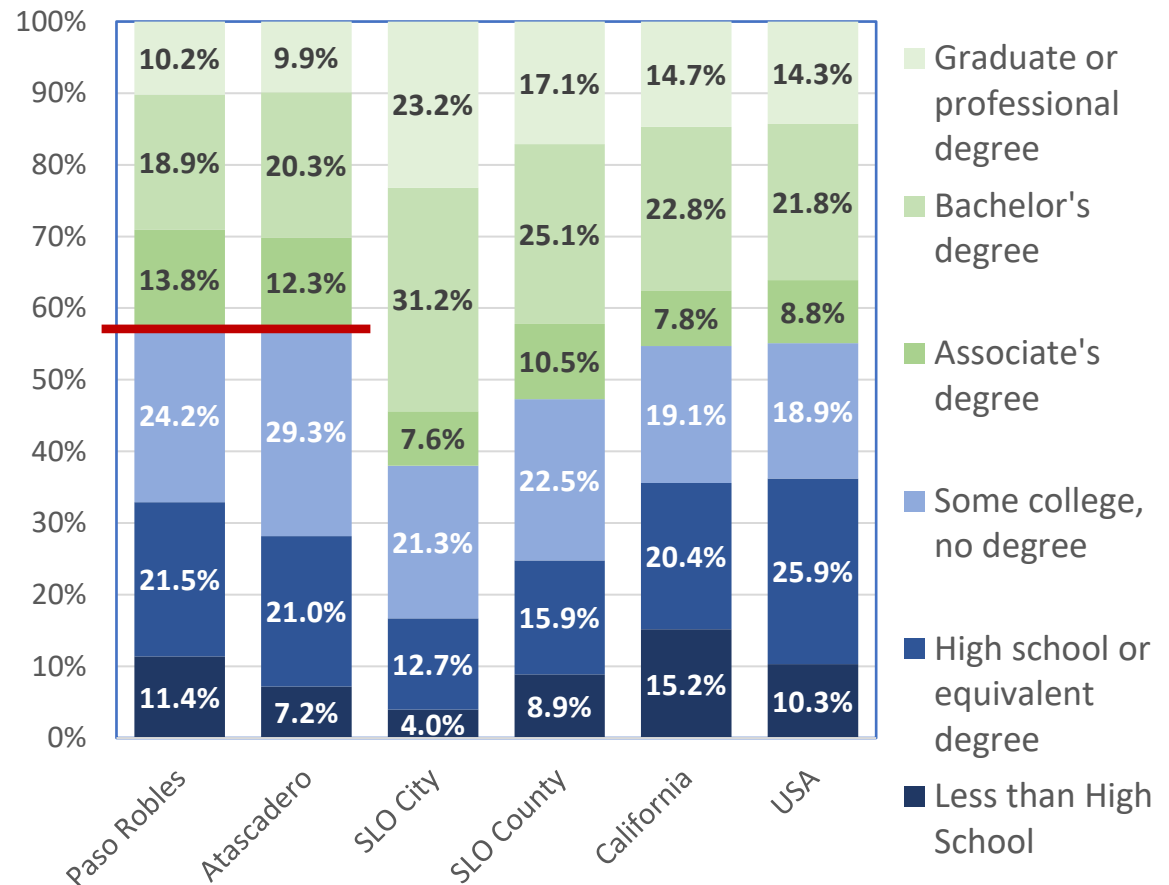
	Atascadero	El Paso de Robles	San Luis Obispo (city)	San Luis Obispo County	California	United States
Households with a computer	95.9%	97.0%	96.5%	96.6%	96.4%	94.8%
Households with broadband Internet	93.7%	94.2%	92.1%	92.4%	92.5%	89.7%
High school grad+, 25 years or older	92.8%	88.7%	96.0%	91.8%	84.6%	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

Source: US Census

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](#)

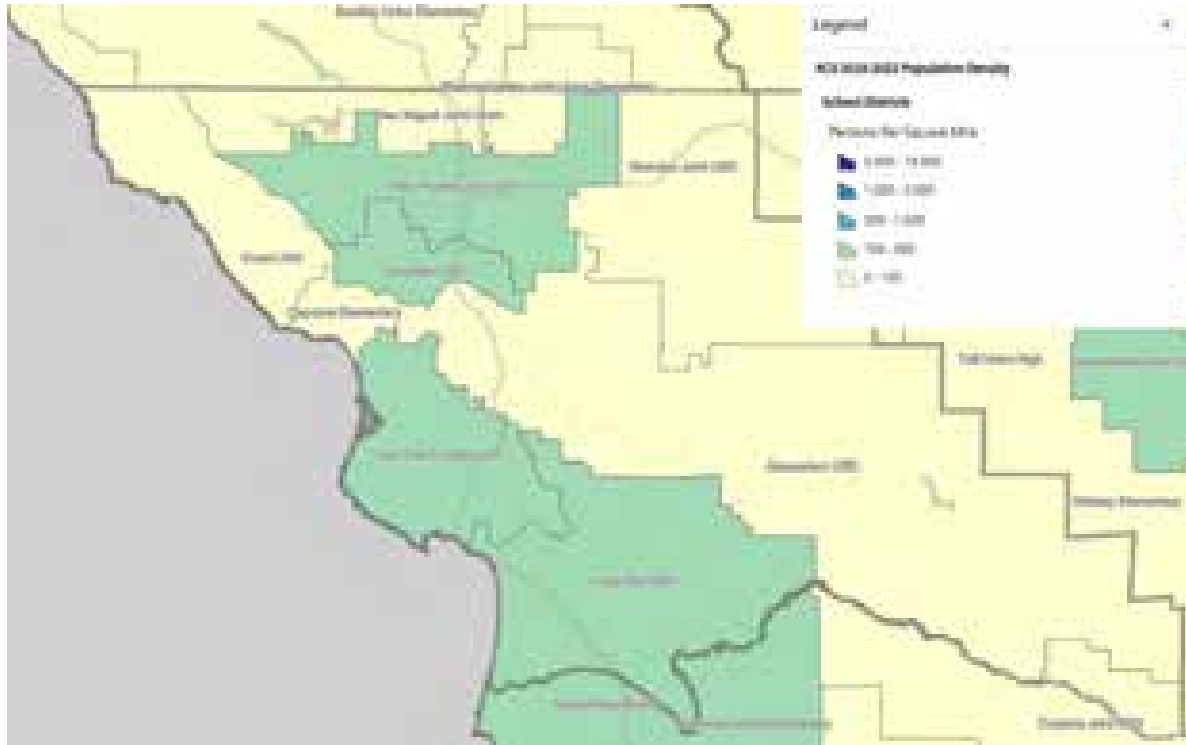
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Thoughts?

K-12 Feeder Schools



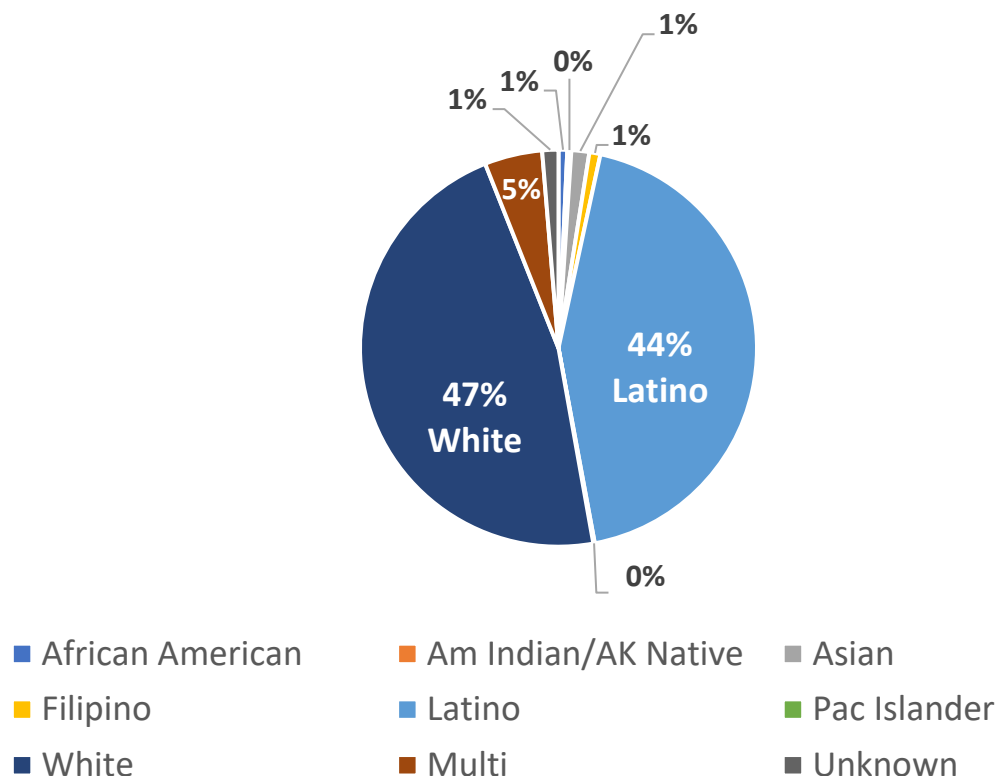
School Districts within SLO County



- 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 [Map](#) by School Districts

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



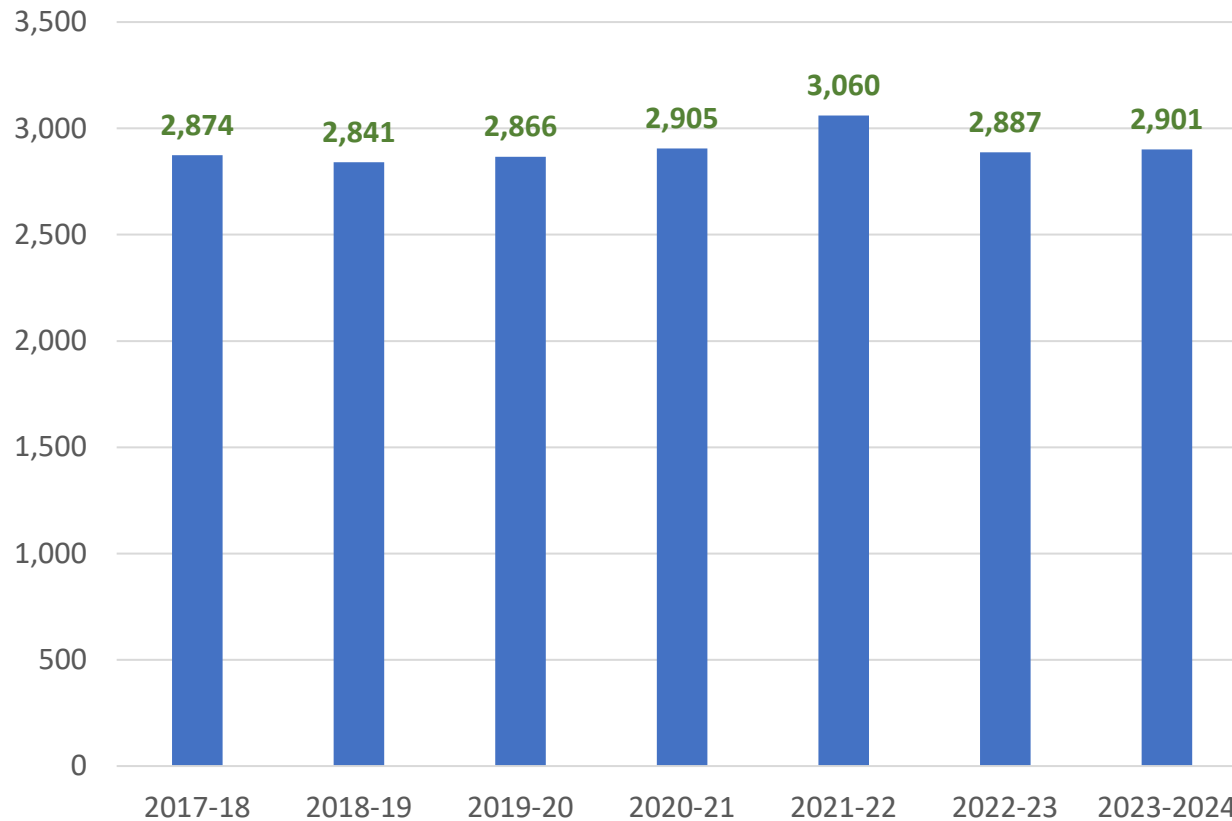
Source: CDE [DataQuest](#)

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 their 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



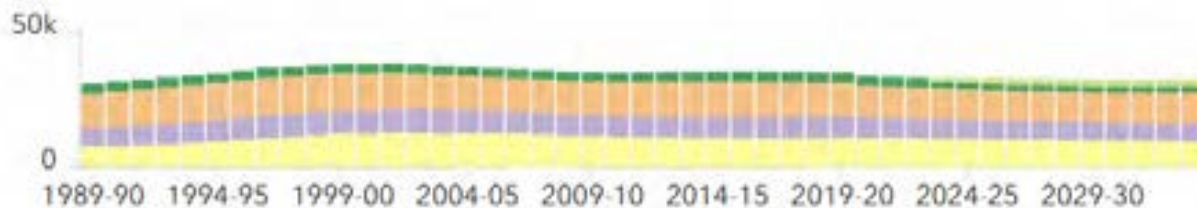
Source: CDE [DataQuest](#)

SLO County K-12 Enrollment Projections

Enrollment change from previous year



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: [CA Department of Finance](#), 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%
<i>California Statewide Average</i>		<i>87.0%</i>	<i>51.4%</i>	<i>62.0%</i>	<i>52.4%</i>

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

Source: CDE [DataQuest](#)



Thoughts?