

ECONOMY

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Economy Summary

Indicator	Measurement	California	San Luis Obispo County	County Trend
Economic Well-Being	Percentage of telephone survey respondents who felt they were economically better off this year than last year	NA	38.8%	↔
Household Income	Median household income	\$58,328	\$60,264	↔
Concern About Employment Opportunities	Percentage of telephone survey respondents who were “very concerned” about employment opportunities in their community	NA	42.3%	↓
Annual Average Unemployment	Unemployment rate	10.5%	8.1%	↔
Net Job Change	Total employment, all industries	NA	107,100	↔
Pay for Selected Occupations	Median hourly pay, real estate agents	\$25.14	\$27.10	↓
Child Care Supply	Percentage of children with parents in the labor force with licensed child care available	25.0%	36.6%	↔
Government Assistance Recipients	CalWORKS average caseload - continuing	NA	1,954	↓
Building Permits	Residential Building Permits – Regional total	NA	366	↓
Travel Spending and Related Impacts	Total direct travel spending <i>(in millions of dollars)</i>	NA	\$1,228.4	↑
Retail Sales	Per capita annual taxable sales	NA	\$14,865	↔

↑ Increasing (Upward) trend; ↓ Declining (Downward) trend; ↔ Inconclusive; variable; no clear trend; **NA** Not applicable or data unavailable.
 Green colored arrow indicates positive trend; Red colored arrow indicates negative trend.
 Note: Data presented in table are the most recent data available.

Economic Well-being

More residents are feeling better off economically this year than last year. Nearly 39% of respondents felt better this year compared to 28% in 2010. However, not having enough money was a “major problem” for 40% of Spanish-Speaking parents in 2013, as compared to 24% in 2010. While 77% of overall ACTION telephone survey respondents had at least \$300 in a savings account in 2013, only 37% of Spanish-Speaking parents had at least \$300 in a savings account.

Do you feel you are better off this year than last year economically?

Response	2006	2010	2013
Yes	32.4%	28.0%	38.8%
No	22.7%	47.6%	25.9%
About the Same	44.9%	24.4%	35.3%
Total Respondents	499	1,083	1,087

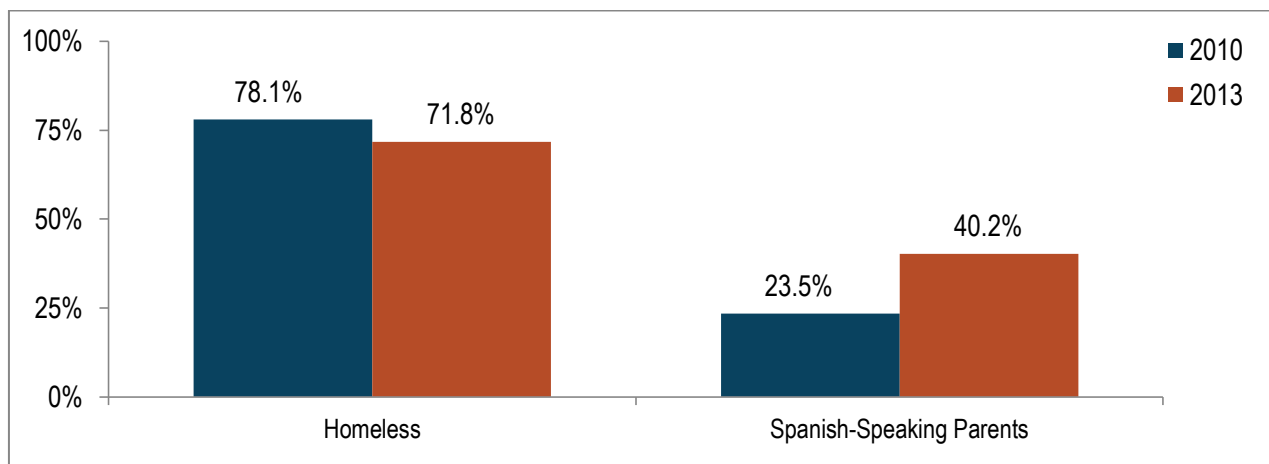
Source: ACTION for Healthy Communities, Telephone Survey, 2006, 2010 and 2013.

Do you feel you are better off this year than last year economically? By Region

Response	North Coast		North County		San Luis Obispo		South County	
	2010	2013	2010	2013	2010	2013	2010	2013
Yes	26.6%	41.5%	36.4%	46.3%	23.5%	34.9%	29.1%	31.9%
No	47.8%	27.2%	44.9%	24.9%	48.6%	25.5%	49.3%	27.3%
About the Same	25.6%	31.3%	18.7%	28.8%	27.9%	39.6%	21.7%	40.8%
Total Respondents	255	248	306	289	244	292	279	259

Source: ACTION for Healthy Communities, Telephone Survey, 2010 and 2013.

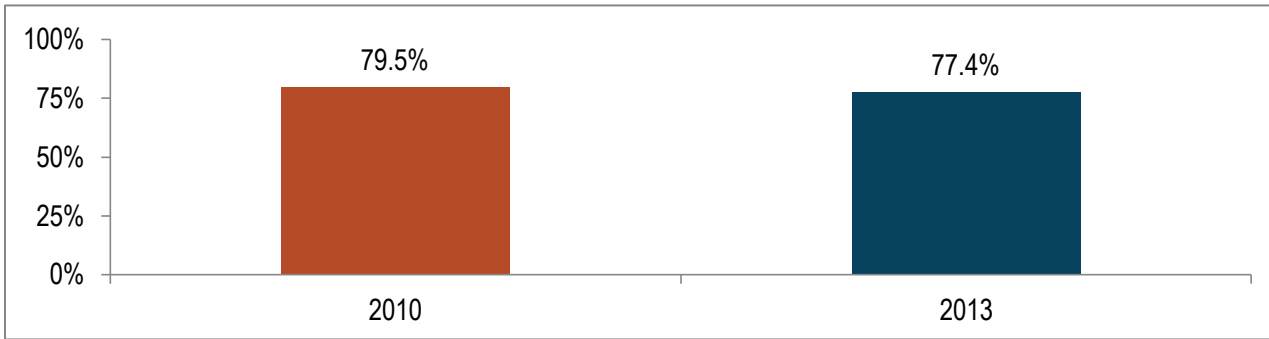
Please indicate if not having enough money is a problem for you personally: (Respondents Answering “Major Problem”)



2010 n: Homeless=114, Spanish-Speaking Parents=85; 2013 n: Homeless=117, Spanish-Speaking Parents=107

Source: ACTION for Healthy Communities, Face-to-Face Survey, 2010 and 2013.

☎ Do you have at least \$300 in a savings account? (Respondents Answering “Yes”)

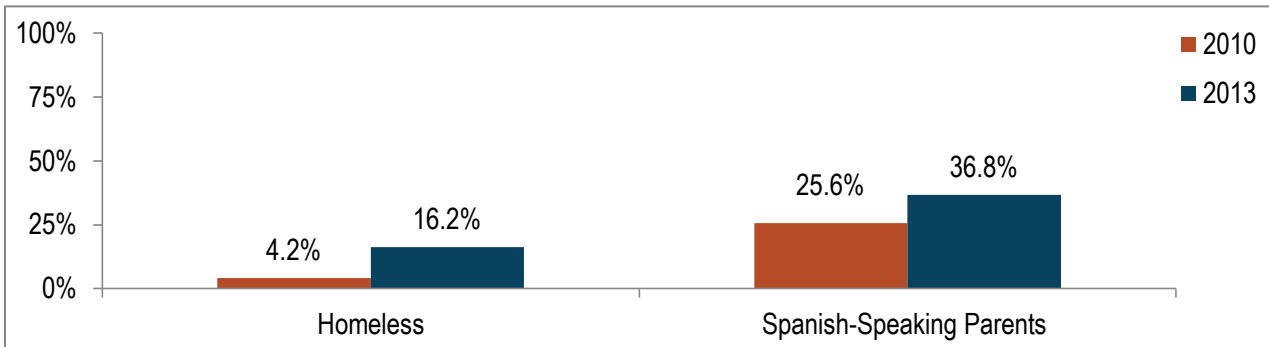


2010 n: 1058; 2013 n: 1054

Source: ACTION for Healthy Communities, Telephone Survey, 2010 and 2013.

Note: For additional information on regional breakdowns, please see Appendix D.

👤 Do you have at least \$300 in a savings account? (Respondents Answering “Yes”)



2010 n: Homeless=118, Spanish-Speaking Parents=86; 2013 n: Homeless=117, Spanish-Speaking Parents=106

Source: ACTION for Healthy Communities, Face-to-Face Survey, 2010 and 2013.

Business Sentiment Survey: Is your firm better off or worse than one year ago?

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much Better	1.8%	10.0%	2.3%	9.0%
Better	25.0%	35.0%	27.4%	46.1%
No Change	39.3%	30.0%	32.6%	29.2%
Worse	32.1%	25.0%	33.7%	12.4%
Much Worse	1.8%	0.0%	4.1%	3.4%

Source: UC Santa Barbara Economic Forecast Project, The San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Business Sentiment Survey: *In six months, do you expect your firm to be better or worse off?*

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much Better	0.0%	5.0%	0.4%	4.5%
Better	26.8%	50.0%	31.9%	62.9%
No Change	44.6%	25.0%	35.4%	19.1%
Worse	28.6%	20.0%	31.5%	11.2%
Much Worse	0.0%	0.0%	0.8%	2.2%

Source: UC Santa Barbara Economic Forecast Project, The 2012 San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Business Sentiment Survey: *Are present business conditions better or worse than a year ago?*

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much Better	0.0%	0.0%	0.0%	1.1%
Better	3.6%	40.0%	4.0%	58.4%
No Change	30.4%	30.0%	24.0%	23.6%
Worse	62.5%	30.0%	66.5%	13.5%
Much Worse	3.6%	0.0%	5.5%	3.4%

Source: UC Santa Barbara Economic Forecast Project, The 2012 San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Business Sentiment Survey: *Do you expect in the next six months to show improved or deteriorated local business conditions?*

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much Improvement	0.0%	0.0%	0.0%	1.1%
Some Improvement	21.4%	45.0%	19.3%	60.7%
No Change	33.9%	45.0%	32.6%	28.1%
Some Decline	39.3%	0.0%	41.4%	4.5%
More Deterioration	5.4%	10.0%	6.7%	5.6%

Source: UC Santa Barbara Economic Forecast Project, The 2012 San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Business Sentiment Survey: Do you expect the local economy to have better or worse conditions in the next five years?

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much Improvement	10.9%	15.0%	7.1%	11.2%
Some Improvement	60.0%	65.0%	56.8%	70.8%
No Change	18.2%	5.0%	13.9%	7.9%
Some Decline	10.9%	15.0%	21.4%	9.0%
More Deterioration	0.0%	0.0%	0.8%	1.1%

Source: UC Santa Barbara Economic Forecast Project, The 2012 San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Household Income

Personal and household incomes are two ways to assess the economic vitality of San Luis Obispo County and the spending power of individuals. Per capita personal income and median household income both increased over the years in San Luis Obispo County. In 2012, median household income was \$60,264 in San Luis Obispo County, higher than both the state (\$58,328) and the nation (\$51,371). In 2012, median household income was \$60,264 in San Luis Obispo County, higher than both the state (\$58,328) and the nation (\$51,371). One-third of ACTION telephone respondents earned \$35,000 or less in household income in 2013.

Per Capita Personal Income

Area	2005	2006	2007	2008	2009	2010	2011	05-11 % Change
San Luis Obispo County	\$35,601	\$38,556	\$40,372	\$40,635	\$37,777	\$38,636	\$40,322	13.3%
California	\$38,767	\$41,567	\$43,402	\$43,852	\$41,034	\$41,893	\$43,647	12.6%
United States	\$35,424	\$37,698	\$39,392	\$40,166	\$38,637	\$39,791	\$41,560	17.3%

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Accounts, 2013.

Note: Per capita personal income (PCPI) is calculated by dividing the total personal income by the total population for a given county. Total personal income (TPI) includes the earnings (wages and salaries, other labor income, proprietors' income); dividends, interest, and rent; and transfer payments received by the residents of San Luis Obispo County.

Median Household Income

Area	2007	2008	2009	2010	2011	2012	07-12 % Change
San Luis Obispo County	\$56,952	\$60,534	\$56,661	\$58,978	\$54,195	\$60,264	5.8%
California	\$59,948	\$61,021	\$58,931	\$57,708	\$57,287	\$58,328	-2.7%
United States	\$50,740	\$52,029	\$50,221	\$50,046	\$50,502	\$51,371	1.2%

Source: United States Census Bureau, American Community Survey 2013. Table B19013, 1-year Estimates, 2007-2012.

Which income range best describes your household income?

Response	2006	2010	2013
Less than \$15,000 per Year	9.2%	9.9%	9.0%
\$15,000 to \$24,999 per Year	12.8%	11.6%	11.5%
\$25,000 to \$34,999 per Year	8.1%	7.8%	12.9%
\$35,000 to \$44,999 per Year	9.7%	8.9%	10.3%
\$45,000 to \$64,999 per Year	18.6%	12.7%	14.7%
\$65,000 to \$79,999 per Year	12.8%	15.8%	10.6%
\$80,000 to \$99,999 per Year	11.2%	11.4%	9.9%
\$100,000 to \$124,999 per Year	7.5%	10.5%	9.6%
\$125,000 to \$150,000 per Year	3.6%	5.0%	4.2%
Over \$150,000 per Year	6.5%	6.2%	7.5%
Total Respondents	424	965	950

Source: ACTION for Healthy Communities, Telephone Survey, 2006, 2010 and 2013.

Note: For additional information on regional breakdowns, please see Appendix D.

Concern about Employment Opportunities

Concern about employment opportunities is dropping. In 2010, slightly over half of ACTION telephone survey respondents (52%) were “very concerned” about employment opportunities in their communities; that percentage dropped to 42% in 2013. In 2013, 45% of respondents were employed full-time, 18% were retired, 11% were employed part-time, and 11% were self-employed. Nearly 8% reported being unemployed.

How concerned are you about employment opportunities in your community?

Response	2010	2013
Very Concerned	52.3%	42.3%
Somewhat Concerned	32.8%	41.3%
Not at All Concerned	14.9%	16.4%
Total Respondents	1,089	1,086

Source: ACTION for Healthy Communities, Telephone Survey, 2010 and 2013.

 **How concerned are you about employment opportunities in your community? By Region**

Response	North Coast		North County		San Luis Obispo		South County	
	2010	2013	2010	2013	2010	2013	2010	2013
Very Concerned	47.5%	48.3%	56.8%	44.1%	48.7%	38.0%	58.0%	41.0%
Somewhat Concerned	37.9%	34.5%	30.7%	41.6%	32.5%	44.7%	28.6%	41.0%
Not at All Concerned	14.6%	17.2%	12.5%	14.3%	18.7%	17.3%	13.4%	18.0%
Total Respondents	255	249	308	290	242	290	284	259

Source: ACTION for Healthy Communities, Telephone Survey, 2010 and 2013.

 **How concerned are you about employment opportunities in your community?**

Response	Homeless			Spanish-Speaking Parents		
	2006	2010	2013	2006	2010	2013
Very Concerned	61.5%	65.0%	60.0%	63.1%	46.5%	36.8%
Somewhat Concerned	26.3%	18.3%	26.7%	21.3%	37.2%	45.3%
Not at All concerned	12.2%	16.7%	13.3%	15.6%	16.3%	17.9%
Total Respondents	213	120	120	160	86	117

Source: ACTION for Healthy Communities, Face-to-Face Survey, 2006, 2010 and 2013.

 **What is your employment status?**

Response	2006	2010	2013
Employed Full-Time	34.3%	39.8%	44.6%
Retired	33.1%	21.2%	17.6%
Employed Part-Time	10.7%	11.2%	10.7%
Self-Employed	9.9%	10.5%	11.1%
Unemployed	6.3%	9.1%	7.6%
Homemaker	6.2%	6.3%	6.2%
Disabled	4.3%	5.9%	3.8%
Student	2.9%	2.5%	5.4%
Casual or Temporary Labor	0.0%	1.8%	1.1%
Total Respondents	500	1,097	1,101
Total Responses	539	1,189	1,189

Source: ACTION for Healthy Communities, Telephone Survey, 2006, 2010 and 2013.

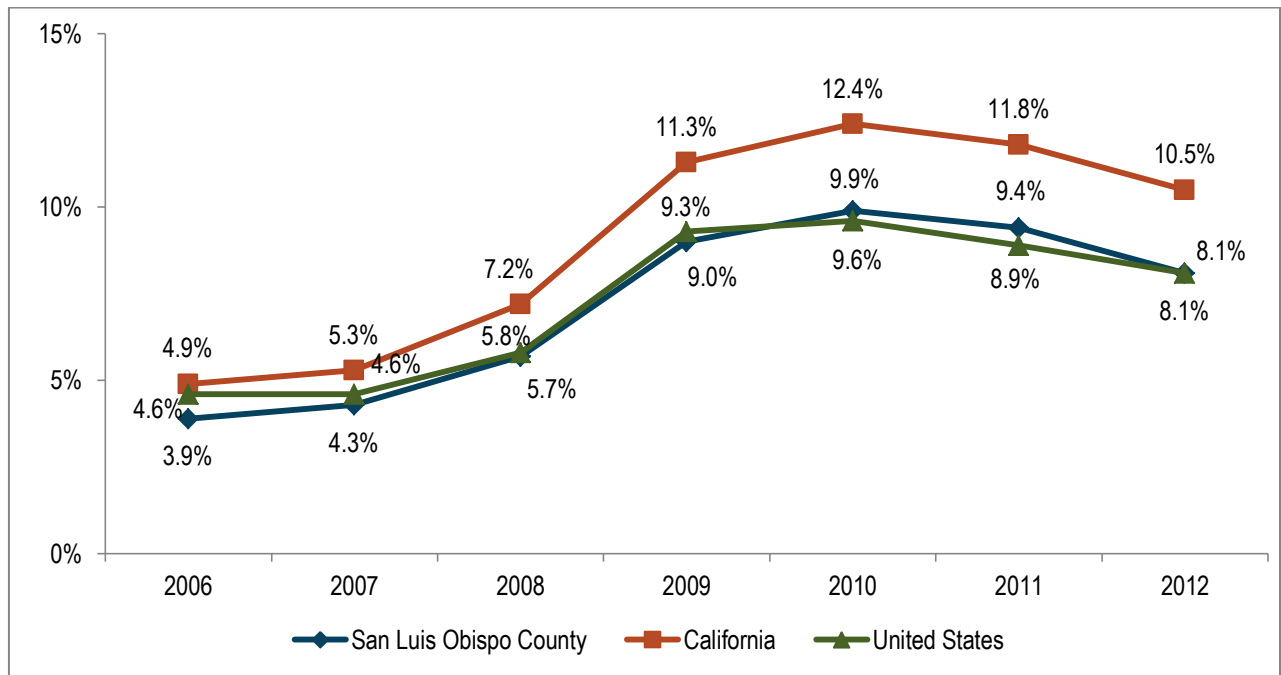
Note: This was a multiple response question which enabled respondents to select more than one response.

Note: For additional information on regional breakdowns, please see Appendix D.

Annual Average Unemployment

The unemployment rate was 8% in San Luis Obispo County in 2012, up from 4% in 2006, but down from a high of 10% in 2010. The highest unemployment rate in 2012 was in Oceano at 15%. Many residents continue to be optimistic about employment, with 70% of San Luis Obispo County residents expecting the “same as now” or “less” unemployment in the coming 12 months, an increase from 55% in 2008.

Unemployment Rate



Source: State of California Employment Development Department, Labor Market Information Division, 2012. U.S. Department of Labor, Bureau of Labor Statistics, U.S. Annual Average Labor Force Data 1948-2009, 2013.

Note: Data not seasonally adjusted.

Unemployment Rate, by Community

Area	2006	2007	2008	2009	2010	2011	2012	06-12 Net Change
Arroyo Grande	4.0%	4.4%	5.9%	9.2%	10.1%	9.6%	8.2%	4.2
Atascadero	3.2%	3.5%	4.7%	7.4%	8.1%	7.7%	6.6%	3.4
Los Osos/Baywood	3.0%	3.3%	4.4%	6.9%	7.7%	7.3%	6.2%	3.2
Cambria	2.7%	3.0%	4.0%	6.3%	7.0%	6.6%	5.7%	3.0
Cayucos	2.2%	2.4%	3.3%	5.2%	5.8%	5.5%	4.7%	2.5
Grover Beach	3.9%	4.2%	5.6%	8.8%	9.7%	9.2%	7.9%	4.0
Lake Nacimiento	4.0%	4.3%	5.8%	9.1%	10.1%	9.6%	8.2%	4.2
Morro Bay	3.1%	3.3%	4.5%	7.1%	7.9%	7.5%	6.4%	3.3
Nipomo	5.3%	5.8%	7.7%	11.9%	13.1%	12.4%	10.7%	5.4
Oceano	7.7%	8.3%	10.9%	16.6%	18.2%	17.4%	15.1%	7.4
Paso Robles	4.7%	5.1%	6.8%	10.7%	11.7%	11.2%	9.6%	4.9
Pismo Beach	4.0%	4.4%	5.9%	9.2%	10.2%	9.6%	8.3%	4.3
San Luis Obispo	4.3%	4.7%	6.3%	9.9%	10.9%	10.3%	8.9%	4.6
San Miguel	4.2%	4.6%	6.2%	9.7%	10.7%	10.2%	8.8%	4.6
Shandon	1.8%	2.0%	2.8%	4.4%	5.0%	4.6%	4.0%	2.2
Templeton	2.8%	3.0%	4.1%	6.4%	7.1%	6.8%	5.8%	3.0

Source: State of California Employment Development Department, Labor Market Information Division, 2012. U.S. Department of Labor, Bureau of Labor Statistics, U.S. Annual Average Labor Force Data 1948-2009, 2013

Note: Data not seasonally adjusted.

Business Sentiment Survey: Do you expect there will be more or less unemployment in the coming 12 months?

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Much More	0.0%	0.0%	2.6%	1.1%
More	44.6%	30.0%	52.9%	46.1%
Same as Now	41.1%	60.0%	28.7%	44.9%
Less	14.3%	10.0%	15.4%	7.9%
Much Less	0.0%	0.0%	0.4%	0.0%

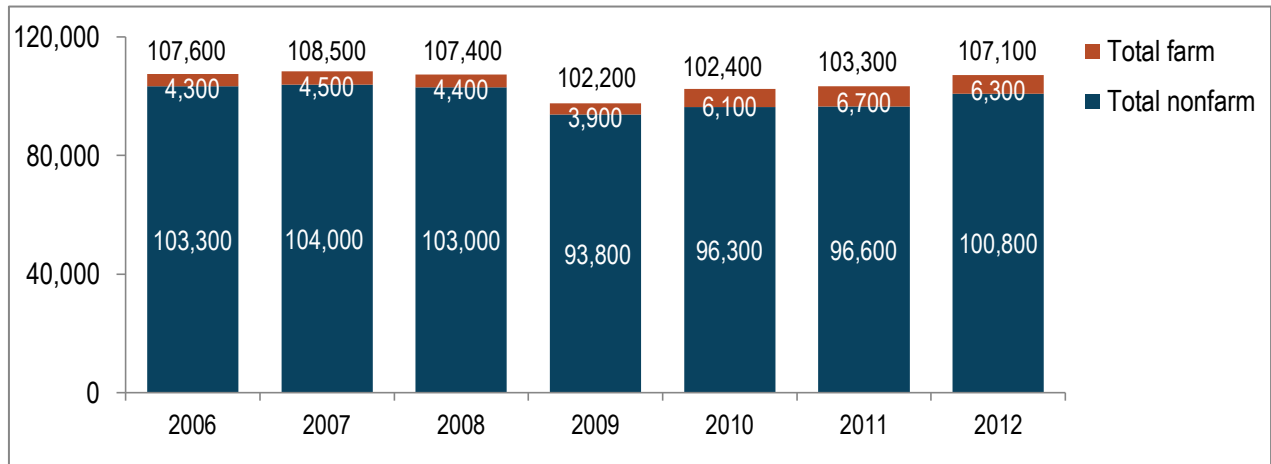
Source: UC Santa Barbara Economic Forecast Project, The 2012 San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Net Job Change

The number of persons currently employed for all industries fluctuated between 2006 and 2012, peaking at 108,500 persons employed in 2007 but falling to 107,100 in 2012. The fastest growing occupation in San Luis Obispo County is Electrical Power-line Installer and Repairer with an estimated 110 new jobs to be created between 2010 and 2020.

Number of Persons Currently Employed by Industry, San Luis Obispo County



Source: State of California Employment Development Department, Labor Market Information, 2006-2012.

Number of Persons Currently Employed in Nonfarm Industry by Type, San Luis Obispo County

Area	2006	2007	2008	2009	2010	2011	2012	06-12 Net Change
Mining, Natural Resources, and Construction	8,200	7,600	6,600	5,300	4,800	5,300	5,300	-2,900
Manufacturing	6,300	6,100	6,200	5,500	6,000	6,100	6,500	200
Wholesale and Retail Trade	16,900	16,900	16,400	15,200	15,700	16,100	16,300	-600
Transportation, Warehousing, and Utilities	3,800	4,100	3,900	3,800	3,600	3,500	3,800	0
Information	1,500	1,400	1,400	1,300	1,200	1,100	1,200	-300
Financial Activities	4,900	4,600	4,200	4,000	3,900	4,100	4,300	-600
Professional and Business Services	9,500	9,800	9,700	8,900	10,000	10,300	11,700	2,200
Educational and Health Services	10,800	11,100	11,400	11,300	11,500	11,400	11,700	900
Leisure and Hospitality	15,000	15,700	15,400	14,900	15,500	15,900	16,300	1,300
Government	22,200	22,300	23,300	23,600	19,600	18,300	19,300	-2,900

Source: State of California Employment Development Department, Labor Market Information, 2006-2012.

Note: Data is of July of each year.

Top 25 Fastest Growing Occupations, San Luis Obispo County

Occupation	2010 Estimated Average Number of Jobs	2020 Projected Average Number of Jobs	2010-20 Projected % Change
Electrical Power-line Installers and Repairers	190	300	57.9%
Home Health Aides	460	700	52.2%
Cost Estimators	180	270	50.0%
Market Research Analysts and Marketing Specialists	180	270	50.0%
Veterinary Technologists and Technicians	200	300	50.0%
Nonfarm Animal Caretakers	200	290	45.0%
Operating Engineers and Other Construction Equipment Operators	300	430	43.3%
Software Developers, Systems Software	120	170	41.7%
Insurance Sales Agents	170	240	41.2%
Construction Laborers	730	1,030	41.1%

Occupation	2010 Estimated Average Number of Jobs	2020 Projected Average Number of Jobs	Projected % Change 2010-20
Carpenters	750	1,050	40.0%
Bus Drivers, Transit and Intercity	260	360	38.5%
Information Security Analysts, Web Developers, and Computer Network Architects	210	290	38.1%
Software Developers, Applications	250	340	36.0%
Retail Salespersons	3,970	5,360	35.0%
Network and Computer Systems Administrators	180	240	33.3%
First-Line Supervisors of Construction Trades and Extraction Workers	430	570	32.6%
Personal Care Aides	1,570	2,080	32.5%
Plumbers, Pipefitters, and Steamfitters	190	250	31.6%
Personal Financial Advisors	160	210	31.3%
Hairdressers, Hairstylists, and Cosmetologists	130	170	30.8%
Construction Managers	510	660	29.4%
Refuse and Recyclable Material Collectors	140	180	28.6%
Pharmacy Technicians	210	270	28.6%
Welders, Cutters, Solderers, and Brazers	180	230	27.8%

Source: State of California Employment Development Department, California Labor Market Information, 2013.

Business Sentiment Survey: Will you be expanding or downsizing your firm in the next twelve months?

Response	San Luis Obispo County		Tri-Counties	
	2008	2011	2008	2011
Expanding More than 10%	7.1%	5.0%	4.9%	7.7%
Expanding 1-9%	12.5%	35.0%	13.8%	29.2%
No Change	64.3%	55.0%	62.0%	50.6%
Downsizing 1-9%	12.5%	0.0%	14.9%	7.9%
Downsizing 10% or More	3.6%	5.0%	4.5%	4.5%

Source: UC Santa Barbara Economic Forecast Project, The San Luis Obispo County Economic Outlook. 2008 and 2011.

Note: Tri-Counties include San Luis Obispo, Santa Barbara, and Ventura Counties.

Pay for Selected Occupations

Among selected occupations, office clerks in San Luis Obispo County saw the largest increase (29%) in median hourly pay between 2005 and 2012 (when they were paid \$14.57 an hour), whereas real estate agents saw the largest decrease (51%) to \$27.10 an hour.

Mean Hourly Pay for Selected Occupations

Occupation	2005	2009	2012	2012 Yearly Salary	05-12 % Change Hourly Salary
Dental Hygienists					
San Luis Obispo County	NA	\$40.48	\$42.85	\$89,128	NA
California	\$39.51	\$41.66	\$44.32	\$92,192	12.2%
Computer Software Engineers (Applications)					
San Luis Obispo County	\$32.73	\$37.02	\$40.92	\$85,114	25.0%
California	\$41.76	\$47.84	\$50.86	\$105,806	21.8%
Carpenters					
San Luis Obispo County	\$22.57	\$23.77	\$26.70	\$55,536	18.3%
California	\$22.22	\$25.30	\$27.38	\$56,946	23.2%
Accountants and Auditors					
San Luis Obispo County	\$28.38	\$34.08	\$30.65	\$63,752	8.0%
California	\$30.40	\$34.79	\$36.43	\$75,763	19.8%
Landscaping and Grounds Keeping Workers					
San Luis Obispo County	\$12.50	\$12.64	\$14.57	\$30,306	16.6%
California	\$11.73	\$13.14	\$13.79	\$28,692	17.6%
Truck Drivers (Heavy and Tractor-Trailer)					
San Luis Obispo County	\$17.06	\$18.37	\$20.81	\$43,284	22.0%
California	\$17.81	\$20.12	\$20.48	\$42,594	15.0%
Secretaries (Except Legal, Medical, and Executive)					
San Luis Obispo County	\$14.01	\$15.49	\$16.53	\$34,382	18.0%
California	\$15.65	\$17.03	\$18.31	\$38,081	17.0%
Office Clerks (General)					
San Luis Obispo County	\$12.47	\$13.62	\$16.09	\$33,467	29.0%
California	\$12.93	\$14.49	\$15.77	\$32,800	22.0%
Restaurant Cooks					
San Luis Obispo County	\$10.85	\$12.10	\$12.27	\$25,522	13.1%
California	\$10.34	\$11.96	\$12.09	\$25,147	16.9%
Cashiers					
San Luis Obispo County	\$10.49	\$10.38	\$11.41	\$23,733	8.8%
California	\$10.05	\$10.61	\$11.51	\$23,934	14.5%

Occupation	2005	2009	2012	2012 Yearly Salary	05-12 % Change Hourly Salary
Financial Analysts					
San Luis Obispo County	\$43.93	\$37.28	\$37.43	\$77,854	-14.8%
California	\$38.17	\$46.62	\$49.13	\$102,186	28.7%
Real Estate Sales Agents					
San Luis Obispo County	\$55.19	\$24.06	\$27.10	\$56,368	-50.9%
California	\$31.10	\$31.85	\$25.14	\$52,299	-19.2%
Retail Salespersons					
San Luis Obispo County	\$10.70	\$11.65	\$12.83	\$26,686	19.9%
California	\$12.42	\$12.27	\$12.75	\$26,521	2.7%

Source: State of California Employment Development Department, California Labor Market Information, 2012.

Note: Median hourly pay data are as of the 1st quarter of each year.

Note: Median yearly salary is calculated by multiplying the median hourly wage by 2,080, or 52 weeks at hours.

Child Care Supply

Just over one-third (37%) of children with working parents in San Luis Obispo County have the option of licensed child care. In addition to this lack of licensed child care, the cost of child care can have an impact on families and their financial stability. A single parent earning minimum wage would spend about half of his or her income on child care for one child.⁸ In San Luis Obispo County, 1,562 children received subsidized child care in 2012. It is estimated that subsidized child care only covers 60% of those in need.⁹ In 2010 there were 646 children in San Luis Obispo County on a waiting list for subsidized care.

⁸ California Child Care Resource & Referral Network. (2011). *The California Child Care Portfolio*.

⁹ *Ibid.*

Child Care Need and Availability, San Luis Obispo County

Child Care Indicator	2006	2008	2010	06-10 % Change
Children with Parents in the Labor Force ¹	23,159	21,054	23,139	-0.1%
Number of Licensed Child Care Slots	8,176	8,979	8,471	3.6%
San Luis Obispo County: Percent of Children with Parents in the Labor Force with Licensed Child Care Available	35.3%	42.6%	36.6%	-
California: Percent of Children with Parents in the Labor Force with Licensed Child Care Available	26.7%	26.9%	25.0%	-

Source: California Child Care Resource and Network, Child Care Portfolio, 2011.

¹ This reflects children with either two parents or single head of household in the labor force.

Note: Data presented are the most recent available.

Estimated Number of Children¹ Ages 0-12 Years Needing Care by Region, San Luis Obispo County (2006-2011)

Region	Children 0-2 Years	Children 3-5 Years	Children 6-12 Years	Total Children 0- 12 Years
North County	628	1,409	2,252	4,289
South County	570	1,027	2,814	4,411
San Luis Obispo	258	558	678	1,494
Coastal	331	859	1,315	2,505
Total number of children	1,787	3,853	7,059	12,699

Source: San Luis Obispo County Child Care Planning Council, 2006 – 2011 Child Care/Learning Program Needs Assessment, 2010.

¹ This reflects children with either two parents or single head of household in the labor force.

Number of Licensed Child Care Centers and Family Child Care Homes by Region, San Luis Obispo County

Region	2005	2007	2009	2011	05-11 % Change
Licensed Child Care Centers	107	111	109	110	2.8%
North County	43	45	42	41	-4.7%
South County	25	25	27	25	0.0%
San Luis Obispo	23	26	22	25	8.7%
North Coast	16	15	18	19	^
Licensed Family Child Care Homes	336	348	335	341	1.5%
North County	133	140	150	147	10.5%
South County	132	126	118	125	-5.3%
San Luis Obispo	43	49	44	42	-2.3%
North Coast	28	33	23	27	-3.6%
Total number of facilities	443	459	444	451	1.8%

Source: Community Action Partnership of San Luis Obispo County, Inc. (CAPSLO), Child Care Resource Connection, 2013.

^: Due to small numbers, data are unstable and subject to misinterpretation.

Number of Child Care Slots by Region, San Luis Obispo County

Region	2005	2007	2009	2011	05-11 % Change
Licensed Child Care Centers	4,601	4,633	4,974	5,191	12.8%
North County	1,620	1,650	1,707	1,861	14.9%
South County	1,285	1,086	1,287	1,236	-3.8%
San Luis Obispo	1,169	1,360	1,336	1,401	19.8%
North Coast	527	537	644	693	31.5%
Licensed Family Child Care Homes	2,741	3,027	3,480	3,398	24.0%
North County	1,166	1,452	1,586	1,594	36.7%
South County	1,073	991	1,262	1,138	6.1%
San Luis Obispo	274	319	406	390	42.3%
North Coast	228	265	226	276	21.1%
Total number of slots	7,342	7,660	8,454	8,589	17.0%

Source: Community Action Partnership of San Luis Obispo County, Inc. (CAPSLO), Child Care Resource Connection, 2013.

Number of Subsidized Child Care Recipients, San Luis Obispo County

Recipient	2006	2007	2008	2009	2010	2011	2012	06-12 % Change
Children	2,665	2,788	2,703	2,369	1,963	1,777	1,562	-41.4%

Source: Economic Opportunity Commission, Child Care Resource Connection, 2013.

Government Assistance Recipients

The average number of new CalWORKs applications decreased from 500 in fiscal year 2009-10 to 258 in fiscal year 2012-13. Continuing or ongoing active cases also decreased during the same time period. The North Region had the highest number of CalWORKs continuing cases in fiscal year 2012-13 with 801. The average number of new General Assistance applications decreased from 168 in fiscal year 2009-10 to 142 in fiscal year 2012-13. Continuing or ongoing active cases increased during the same time period from 210 to 291. The Central Region had the highest number of General Assistance continuing cases in fiscal year 2012-13 with 195.

Average CalWORKs Caseload

Response	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	09-13 % Change
Intake ¹	500	765	921	258	-48.4%
Continuing ²	2,104	2,183	2,089	1,954	-7.1%

Source: San Luis Obispo County, Department of Social Services, 2013.

¹ New CalWORKs applications processed.

² Ongoing active CalWORKs cases.

Average CalWORKs Continuing¹ Caseload, by Region

Region	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	09-13 % Change
North Region – Paso Robles	853	867	841	801	-6.1%
North Region - Atascadero	412	418	438	391	-5.1%
Central Region	219	240	234	198	-9.6%
Coastal Region	151	164	171	163	7.9%
South Region – Arroyo Grande	528	524	510	481	-8.9%
South Region - Nipomo	255	261	245	224	-12.2%

Source: San Luis Obispo County, Department of Social Services, 2013.

¹ Ongoing active CalWORKs cases.

Average General Assistance Caseload, San Luis Obispo County

Response	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	09-13 % Change
Intake ¹	168	179	153	142	-15.5%
Continuing ²	210	213	237	291	38.6%

Source: San Luis Obispo County, Department of Social Services, 2013.

¹ New General Assistance applications processed.

² Ongoing active General Assistance cases.

Average General Assistance Continuing¹ Caseload, by Region

Region	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	09-13 % Change
North Region	89	92	95	114	28.1%
Central Region	131	128	145	195	48.9%
Coastal Region	38	33	42	42	10.5%
South Region	106	113	109	131	23.6%

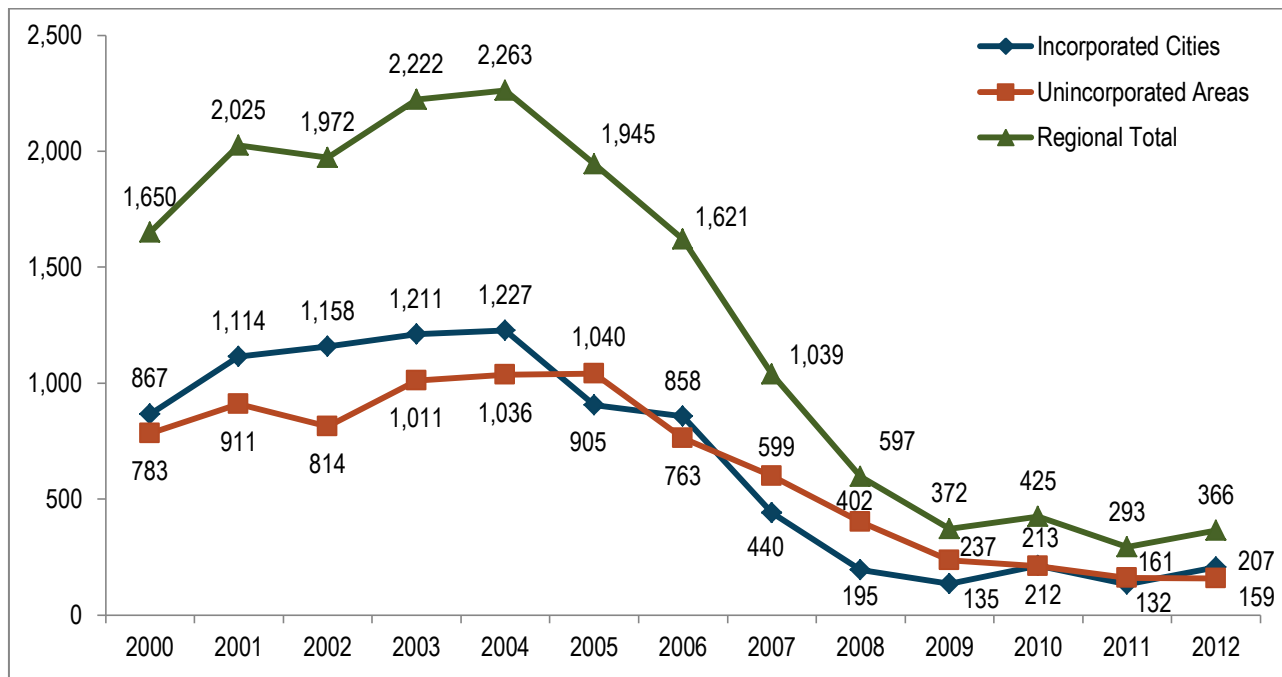
Source: San Luis Obispo County, Department of Social Services, 2013.

¹ Ongoing active General Assistance cases.

Building Permits

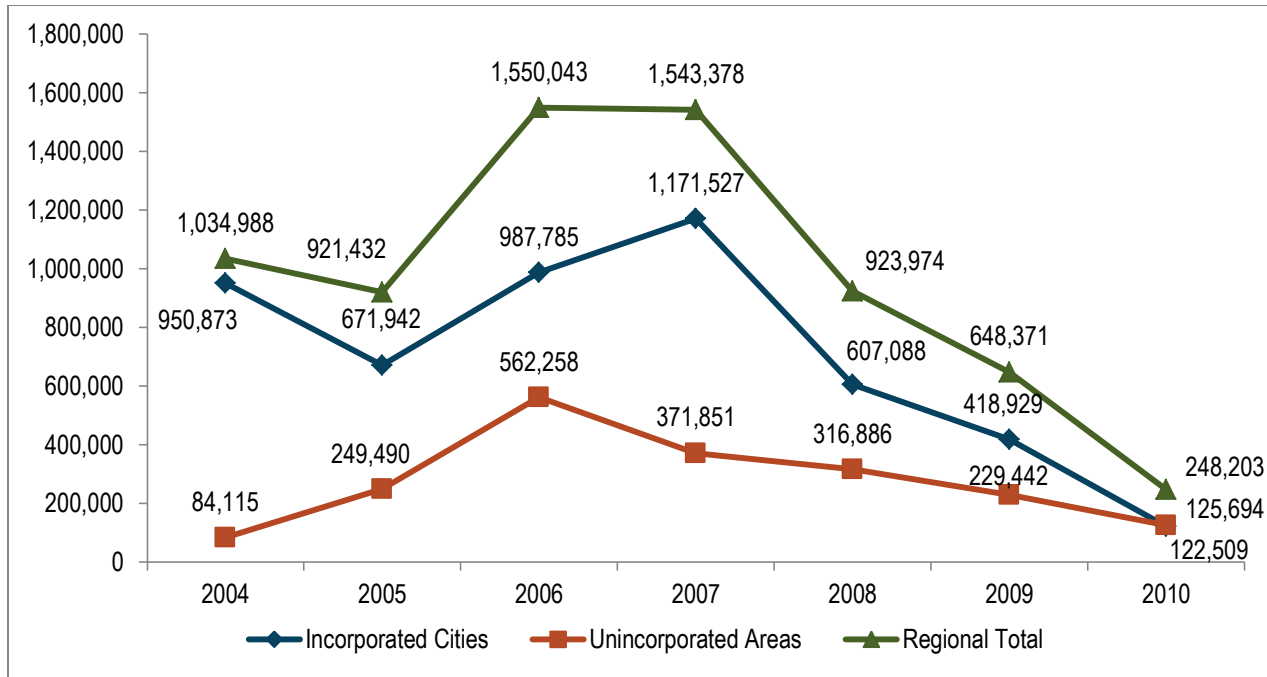
Since 2000, the number of residential building permits in San Luis Obispo County has dropped dramatically. From a high of nearly 2,300 building permits in 2004 across the region, the number of permits has fallen to an annual average of less than 400 for the years 2009 to 2012. On a similar note, square footage of non-residential building permits has seen a drastic decrease since 2007, and reached its lowest point in 2010.

Number of Residential Building Permits, San Luis Obispo County



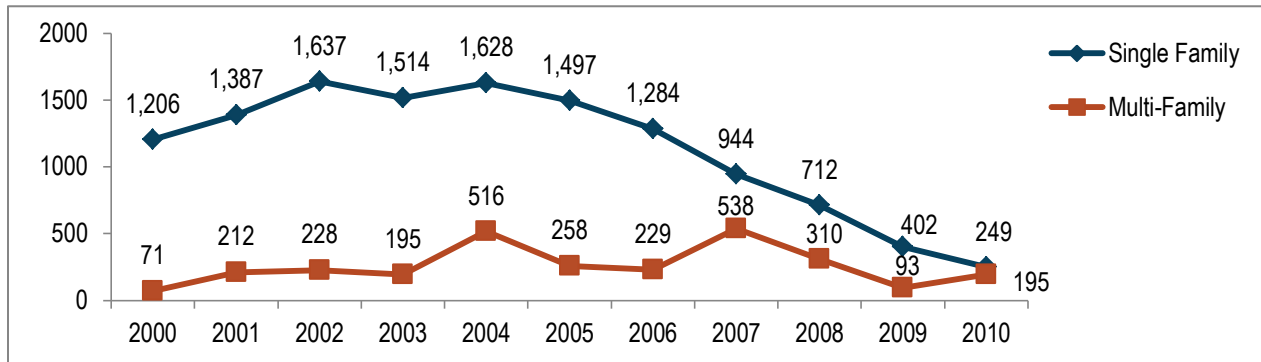
Source: Construction Industry Research Board, (2012) Personal Correspondence with program representative.

Non-Residential Building Permits in Square Footage, San Luis Obispo County



Source: San Luis Obispo Regional Building Permit Survey, SLO Council of Governments and SLO Air Pollution Control District (building permit activity: 2004 to 2010)

Residential Building Permits by Building Type, San Luis Obispo County (2000-2013)



Source: San Luis Obispo Regional Building Permit Survey, SLO Council of Governments and SLO Air Pollution Control District (building permit activity: 2000 to 2010).

Travel Spending and Related Impacts

Travel spending throughout San Luis Obispo County has been consistently increasing over the last seven years. The impact this spending has on the economy in terms of earnings, employment, and tax revenue is positive, as it infuses the community and local businesses with money. In total, the amount of direct travel spending in San Luis Obispo County has increased considerably, from \$1.0 billion in 2005 to \$1.2 billion in 2011.

Travel Spending (in Millions of Dollars) and Related Impacts, San Luis Obispo County

Category	2005	2006	2007	2008	2009	2010	2011	05-11 % Change
Total Direct Spending	\$1,024.3	\$1,083.6	\$1,139.0	\$1,138.2	\$1,092.1	\$1,158.3	\$1,228.4	19.9%
Local Tax Receipts	\$22.3	\$24.3	\$26.2	\$25.4	\$23.7	\$25.8	\$27.6	23.8%
State Tax Receipts	\$40.3	\$42.1	\$43.9	\$43.9	\$46.1	\$50.5	\$51.5	27.8%
Employment Generated by Visitor Spending (Number of Jobs)	16,460	16,610	16,890	16,170	15,610	15,470	15,570	-5.4%

Source: Dean Runyan and Associates, California Travel Impacts by County, 2013

Transient Occupancy Tax (TOT) ¹ by Jurisdiction (in Thousands of Dollars)

Jurisdiction	2006	2007	2008	2009	2010	2011	2012	06-12 % Change
Arroyo Grande	\$435.0	\$449.0	\$437.2	\$388.5	\$348.0	\$390.2	\$630.4	44.9%
Atascadero	\$479.5	\$478.6	\$407.6	\$418.6	\$409.2	\$525.5	\$638.1	33.1%
Grover Beach	\$220.0	\$238.1	\$232.9	\$230.8	\$220.4	\$219.1	\$260.6	18.5%
Morro Bay	\$1,800.3	\$1,897.8	\$1,961.7	\$1,602.3	\$1,818.5	\$1,868.3	\$2,026.2	12.5%
Paso Robles	\$1,612.7	\$2,031.5	\$2,549.9	\$2,710.3	\$2,735.7	\$3,023.3	\$3,230.0	100.3%
Pismo Beach	\$5,290.4	\$5,908.2	\$6,175.0	\$6,164.9	\$5,779.3	\$6,268.9	\$6,931.2	31.0%
San Luis Obispo	\$4,539.2	\$4,788.9	\$5,064.1	\$4,720.0	\$4,478.3	\$4,859.4	\$5,249.8	15.7%
Un-incorporated	\$5,410.7	\$5,975.5	\$6,474.3	\$6,796.6	\$6,428.9	\$6,162.2	\$6,392.0	18.1%
Regional Totals	\$19,787.8	\$21,767.6	\$23,302.7	\$23,032.0	\$22,218.3	\$23,316.9	\$25,358.3	23.2%

Source: Dean Runyan and Associates, California Travel Impacts by County, 2012.

Note: Since 2001, the Transient Occupancy Tax (TOT) rate for Grover Beach, Morro Bay, Paso Robles, and Pismo Beach have remained constant at 10%. The TOT rate for unincorporated areas of San Luis Obispo County has also stayed the same since 2001 at 9%. The TOT rate for Arroyo Grande increased from 6% in 2001 to 10% in 2003, and has stayed the same since. As for Atascadero and San Luis Obispo, the TOT rate increased from 9% in 2001 to 10% in 2003, and has stayed the same since.

¹ TOT is levied for the privilege of occupying a room or rooms or other living space in a hotel, inn, tourist home or house, motel or other lodging for a period of 30 days or less.

Retail Sales

Taxable sales are a measure of consumer spending and confidence because it is quick to react to decreases in consumer confidence and spending power. From 2005 to 2011, San Luis Obispo County experienced a decrease in annual taxable sales in all jurisdictions, except for Pismo Beach, San Luis Obispo and the unincorporated areas of the county.

Per Capita Taxable Sales by Type of Business

Type of Business	San Luis Obispo County			California		
	2010	2011	10-11 % Change	2010	2011	10-11 % Change
Retail stores total						
Motor Vehicle and Parts Dealers	\$1,214	\$1,374	13.2%	\$1,269	\$1,419	11.8%
Furniture and Home Furnishings Stores	\$229	\$251	9.6%	\$234	\$247	5.6%
Electronics and Appliance Store	\$259	\$257	-0.8%	\$369	\$381	3.3%
Building Material and Garden Equipment and Supplies	\$931	\$997	7.1%	\$663	\$694	4.7%
Food and Beverage Stores	\$814	\$840	3.2%	\$611	\$628	2.8%
Health and Personal Care Stores	\$284	\$299	5.3%	\$255	\$274	7.5%
Gasoline Stations	\$1,456	\$1,797	23.4%	\$1,212	\$1,470	21.3%
Clothing and Clothing Accessories Stores	\$691	\$700	1.3%	\$731	\$788	7.8%
Sporting Goods, Hobby, Book and Music Stores	\$355	\$371	4.5%	\$278	\$282	1.4%
General Merchandise Stores	\$1,187	\$1,262	6.3%	\$1,242	\$1,283	3.3%
Miscellaneous Store Retailers	\$525	\$532	1.3%	\$444	\$457	2.9%
Nonstore Retailers	\$58	\$57	-1.7%	\$76	\$82	7.9%
Food Services and Drinking Places	\$1,622	\$1,712	5.5%	\$1,375	\$1,457	6.0%
Total Retail and Food Services	\$9,626	\$10,448	8.6%	\$8,759	\$9,463	8.0%
Total All Outlets	\$13,405	\$14,865	11.0%	\$12,794	\$13,856	8.3%

Source: California State Board of Equalization, *Taxable Sales in California (Sales & Use Tax)*, 2011. California Department of Finance, *Demographic Research Unit, 2013 Table 2: E-4 California County Population Estimates for Cities, Counties and State, 2001-2010, with 2000 Benchmark, 2011.*

Note: Per capita taxable sales figures are for each calendar year and are derived by dividing taxable sales by the total population for a given area.

Annual Taxable Sales (in Thousands of Dollars) by Jurisdiction, San Luis Obispo County

Jurisdiction	2005	2006	2007	2008	2009	2010	2011	05-11 % Change
Arroyo Grande	\$314,837	\$308,612	\$297,743	\$279,047	\$251,965	\$255,395	\$270,288	-14.1%
Atascadero	\$351,538	\$349,215	\$325,558	\$295,766	\$251,316	\$253,351	\$275,298	-21.7%
Grover Beach	\$92,409	\$96,053	\$95,733	\$92,190	\$81,295	\$85,740	\$91,318	-1.2%
Morro Bay	\$128,570	\$133,624	\$137,583	\$133,694	\$118,788	\$119,777	\$125,451	-2.4%
Paso Robles	\$681,878	\$719,733	\$692,867	\$637,471	\$571,661	\$613,616	\$664,255	-2.6%
Pismo Beach	\$185,061	\$196,592	\$204,784	\$206,945	\$189,350	\$190,624	\$209,086	13.0%
San Luis Obispo	\$1,140,163	\$1,228,079	\$1,226,170	\$1,163,793	\$1,032,297	\$1,080,237	\$1,188,454	4.2%
Un-incorporated Areas ¹	\$1,042,002	\$1,188,528	\$1,287,201	\$1,165,320	\$945,759	\$1,015,615	\$1,193,839	14.6%
San Luis Obispo County Total	\$3,936,458	\$4,220,436	\$4,267,639	\$3,974,226	\$3,442,431	\$3,614,355	\$4,017,989	2.1%

Source: California State Board of Equalization, Taxable Sales by City, 2013.

¹ Unincorporated figures found by subtracting the county total from the sub-total of listed jurisdictions.

Per Capita Taxable Sales by Jurisdiction, San Luis Obispo County

Jurisdiction	2005	2006	2007	2008	2009	2010	2011	05-11 % Change
Arroyo Grande	\$18,964	\$18,541	\$17,687	\$16,424	\$14,648	\$14,804	\$15,618	-17.6%
Atascadero	\$12,691	\$12,593	\$11,669	\$10,373	\$8,898	\$8,949	\$9,625	-24.2%
Grover Beach	\$6,959	\$7,249	\$7,283	\$6,996	\$6,174	\$6,517	\$6,919	-0.6%
Morro Bay	\$12,183	\$12,701	\$13,122	\$12,707	\$11,602	\$11,704	\$12,187	0.0%
Paso Robles	\$24,288	\$24,775	\$23,370	\$21,353	\$19,223	\$20,596	\$22,203	-8.6%
Pismo Beach	\$21,330	\$22,748	\$23,862	\$24,119	\$24,407	\$24,902	\$27,218	27.6%
San Luis Obispo	\$25,514	\$27,561	\$27,596	\$26,106	\$22,972	\$23,942	\$26,253	2.9%
Unincorporated areas	\$9,293	\$10,468	\$11,191	\$10,010	\$8,136	\$8,598	\$10,114	8.8%
San Luis Obispo County Total	\$15,042	\$15,990	\$16,041	\$14,794	\$12,867	\$13,405	\$14,865	-1.2%

Source: California State Board of Equalization, Taxable Sales by City, 2011. California Department of Finance, Demographic Research Unit, Table 2: E-4 California County Population Estimates for Cities, Counties and State, 2001-2011, with 2010 Benchmark, 2013.

