

Project Report

**Long Range Socio-Economic  
Projections (Year 2030)**

**San Luis Obispo County, CA**

Prepared for

**San Luis Obispo Council of  
Governments**

Submitted by

**Economics Research Associates**

**May 2006**

**Revised July 2006**

**ERA Project No. 16401**

10990 Wilshire Boulevard Suite 1500  
Los Angeles, CA 90024  
310.477.9585 FAX 310.478.1950 www.econres.com  
**Los Angeles San Francisco San Diego**  
**Chicago Washington DC New York London**



## Table of Contents

---

<b>Section I.</b>	<b>Population Projection</b>	<b>1</b>
	Introduction	1
	County Population Trends - Historic	1
	Projected Population Growth in California	6
	Sub-County Population Growth – Historic	8
	Sub-County Population Growth – Projected	12
<b>Section II.</b>	<b>Employment Projection</b>	<b>16</b>
	Introduction	16
	County Employment Trends - Historic	16
	Projected Industry Changes and Employment Shares	18
	Projected Employment Growth in California	21
	County Employment Growth – Projected	23



## Appendices

- Appendix 1 – Population Growth 1970 – 1980
- Appendix 2 – Population Growth 1980 – 1990
- Appendix 3 – Population Growth 1990 – 2000
- Appendix 4 – Population Growth 1970 – 2005
- Appendix 5 – Population Growth 1990 – 2005
- Appendix 6 – Population Growth 1995 – 2005
- Appendix 7 – Population Growth 2000 – 2005
- Appendix 8 – SLO Annual Numeric Change as Percentage of California Numeric Change
- Appendix 9 – Central Coast Population Growth
- Appendix 10 – SLO Population Growth as Percentage of Central Coast
- Appendix 11 – SLO population as Percentage of California Population
- Appendix 12 – SLO Population Change by Year
- Appendix 13 – SLO Percentage of Population by Year
- Appendix 14 – SLO Population Growth Indexed to 1970 as Percentage of California Total Population
- Appendix 15 – SLO Age Distribution
- Appendix 16 – SLO Age-Sex Pyramid
- Appendix 17 – Income Distribution by Region
- Appendix 18 – SLO Income Distribution Comparison by Census
- Appendix 19 – Education Levels by Region
- Appendix 20 – Education Levels in SLO
- Appendix 21 – SLO Households
- Appendix 22 – Household Growth by Region
- Appendix 23 – Persons Per Household by Region
- Appendix 24 – Housing Units by Region
- Appendix 25 – Housing Unit Growth by Region
- Appendix 26 – SLO Residential Building Activity
- Appendix 27 – Residential Building Activity (Unincorporated vs. Incorporated)
- Appendix 28 – Residential Building Activity by City
- Appendix 29 – Residential Building Activity (Single Family vs. Multifamily) Data
- Appendix 30 – Housing Prices by Region
- Appendix 31 – Median Home Value Comparison by Region
- Appendix 32 – Housing Prices Comparison by Region
- Appendix 33 – City Level Real Estate
- Appendix 34 – Non-Farm Employment by Region
- Appendix 35 – Shift Share Analysis
- Appendix 36 – Non Farm Employment by Sector
- Appendix 37 – Retail Sales by Type
- Appendix 38 – All Retail Sales

## List of Figures

---

Figure 1 Comparison of Compound Annual Growth Rates.....	2
Figure 2 Comparison of Average Numeric Growth Rates .....	3
Figure 3 Comparison of Regional Shares .....	3
Figure 4 Natural Increase presented as Annual Growth in SLO County.....	5
Figure 5 Population Growth – Net Migration vs. Natural Increase .....	5
Figure 6 SLO Percent of Population by Age Group – 1990 and 2000.....	6
Figure 7 California Growth Projections - Actual.....	7
Figure 8 California Growth Projections - Implied.....	7
Figure 9 SLO County’s Projected Growth as Fair Share of Projected California State Growth .....	8
Figure 10 Population and Shares of County Total Population .....	9
Figure 11 City Population as Share of County Total Population (1980 – 2005) .....	9
Figure 12 Compound Annual Growth Rates for Sub-County Areas .....	10
Figure 13 City Population Growth Indexed to 1980 .....	11
Figure 14 Average Five-Year Population Growth for Sub-County Areas .....	12
Figure 15 Low Population Projection by Area (2030).....	13
Figure 16 Medium Population Projection by Area (2030) .....	14
Figure 17 High Population Projection by Area (2030).....	15
Figure 18 Comparison of Compound Annual Growth Rates.....	17
Figure 19 Comparison of Average Numeric Growth Rates .....	17
Figure 20 Comparison of Relative Regional Shares.....	18
Figure 21 Projected Changes in Non-Farm Employment by Industry .....	19
Figure 22 Comparison of Employment Shares by Industry (2005) .....	20
Figure 23 Location Quotient Analysis for SLO County vs. California .....	21
Figure 24 California Growth Projections - Actual.....	22
Figure 25 California Growth Projections – Implied .....	22
Figure 26 SLO County Employment Growth Projections (Non-Farm) .....	23
Figure 27 Low County Employment Projection (2030) .....	24
Figure 28 Medium County Employment Projection (2030).....	25
Figure 29 High County Employment Projection (2030).....	26
Figure 30 Low Sub-Region Employment Projection (2030).....	28
Figure 31 Medium Sub-Region Employment Projection (2030) .....	29
Figure 32 High Sub-Region Employment Projection (2030).....	30

## **General Limiting Conditions**

Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible, and they are believed to be reliable.

This study is based on estimates, assumptions and other information reviewed and evaluated by Economics Research Associates from its consultations with the client and the client's representatives and within its general knowledge of the industry. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives or any other data source used in preparing or presenting this study.

This report is based on information that was current as of *May 2006* or as noted in the report, and Economics Research Associates has not undertaken any update of its research effort since such date.

No warranty or representation is made by Economics Research Associates that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "Economics Research Associates" in any manner without first obtaining the prior written consent of Economics Research Associates. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of Economics Research Associates. This report is not to be used in conjunction with any public or private offering of securities or other similar purpose where it may be relied upon to any degree by any person other than the client without first obtaining the prior written consent of Economics Research Associates. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from Economics Research Associates.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.



## **Preface**

Client has commissioned Economics Research Associates (ERA) to perform long-range socio-economic projections for San Luis Obispo County.

### **Project overview**

In order for the San Luis Obispo Council of Governments (SLOCOG) to develop a reasonably accurate Regional Traffic Model for the year 2030 it is important to prepare a carefully considered estimate of future population and employment for the region. This report provides a top-down forecast of growth that provides control totals for population and job growth with the bottom-up forecast that is derived from aggregating data from various local jurisdictions. ERA presents three alternative growth scenarios (low, medium, and high) in five-year increments for both population and employment projections through 2030.

### **Organization of the Report**

Following the attached Executive Summary, this report is organized into two sections as follows.

**Section I.      Population**

**Section II.     Employment**

Every reasonable effort has been made to present information that is most current as of the time of writing this report.

## **Executive Summary**

ERA's projected population and employment growth for 2030 in San Luis Obispo County is based on the following methodology: First, we collected and analyzed the most recent and thorough population and employment projections for the State of California. Utilizing this "top-down" approach, we established controls for predicted growth within the region based on a low, medium, and high growth scenario. Using a variety of data sources, we established projected future shares of the County growth based on historic trends and projected changes within the region. Using the established "fair share" of population and employment growth that the County can expect to experience in relation to the State, projections were established by five-year time period until 2030.

Second, ERA interviewed planners from incorporated areas within SLO as well as planners from the unincorporated County areas to discuss areas where population and employment growth is expected to occur. The representatives interviewed during this process also provided ERA with general timeframes for when the aforementioned growth is predicted to take place. Finally, the information collected was analyzed and compared against historical findings presented throughout this report. The results of this effort are presented on the following page at the County level in summary format.

We believe this "fair share" analysis tied to macro changes within the State is the most appropriate methodology to establish estimates for both population and employment growth within the County for 2030. Implicit in the researched statewide forecasts are projected changes for numerous variables that will affect both the State and county in the future (e.g. economy, immigration, death rates, changes in technology, etc.).



## County Projections 2005 - 2030

Projected Population Growth			
Year	Low	Medium	High
2005	260,727	260,727	260,727
2010	273,101	274,860	276,671
2015	284,875	288,426	293,856
2020	299,668	304,899	314,897
2025	314,567	318,980	331,496
2030	329,759	335,326	352,087
CAGR	0.9%	1.0%	1.2%
Numeric Growth	69,032	74,599	91,360
Annual Average	2,761	2,984	3,654

Projected Employment Growth (Non-Farm)			
Year	Low	Medium	High
2005	100,700	100,700	100,700
2010	107,082	110,079	112,031
2015	116,258	120,480	124,559
2020	126,198	131,834	138,410
2025	136,965	144,230	153,723
2030	148,630	157,764	170,653
CAGR	1.57%	1.81%	2.13%
Numeric Growth	47,930	57,064	69,953
Average Annual	1,917	2,283	2,798

Source: ERA

## **Section I. Population Projection**

### ***Introduction***

The following section presents the process in which the low, medium, and high population growth scenarios for San Luis Obispo County (SLO County or County) were determined. The purpose of this analysis is to establish a broad “top-down” countywide forecast of growth that will act as a control for comparison with the later “bottom-up” forecast based on levels of predicted growth tied to community planning and existing land use entitlements for jurisdictions within SLO County.

### ***County Population Trends - Historic***

The California Department of Finance’s (DOF) Demographic Research Unit and the U.S. Census Bureau provide historic population estimates in SLO County, the tri-county area that includes SLO County, Monterey County, and Santa Barbara County (collectively defined as the “Central Coast”), and the state of California. All DOF statistical information is taken from E-4 (Population Estimates) and E-6 (Revised County Population Estimates) data sets. The data provided herein also includes census counts based on the decennial survey results for 1970 to 2000.

The DOF population estimates come from administrative records of several state and federal government departments and agencies, as well as numerous local jurisdictions. Since timeliness and coverage in these series vary, corrections, smoothing, and other adjustments are applied. The data and models used to produce DOF population estimates are subject to measurement and nonmeasurement errors. The data and estimating models are thoroughly tested with decennial census results that provide benchmarks for the estimates series. According to the DOF, the total state estimate was within one-half of one percent (0.5%) of the 2000 census count; county estimates varied by an average of 1.9 percent, and city estimates varied by an average of 5.6 percent. It is also important to note that the data provided herein represents the total population for the county since 1970, which includes both the household and “group quarters” population. In the later analysis, the group quarter population will be held constant so the population projections are not artificially inflated.

Population change is examined on numerous levels, including: compound annual growth rates (CAGR) between specific time intervals, numeric changes in population from the previous year, relative share between regions (i.e., SLO County share of the Central Coast), and indexed growth rates to compare and chart relative growth trends between study areas (as presented in the Appendix). By examining these basic factors, many trends become evident.

First, between 1970 and 1990 SLO County experienced relative population growth at a much higher rate than both the Central Coast and California. During this 20-year time period, the CAGR for SLO County was 3.64 percent. In comparison the Central Coast and California had a CAGR of 2.12 and 2.01 percent, respectively. However, since 1990, SLO County population’s CAGR has changed dramatically. While still 0.23 percentage points higher than the Central Coast, SLO County’s 1.29 percent CAGR is 2.35 percentage points below the growth rate experienced between 1970 and 1990. During the last 15 years (since 1990), SLO County was 0.12 percentage points below the California average. Analyzing the 10-year period since 1995, SLO County grew at 1.38 percent, slightly higher than the 15 year average. During the last five years (since 2000), however, SLO County’s population growth rates declined from previous levels, averaging a 1.26 percent CAGR. Following a similar trend since 1990, the County is 0.29 percentage points above the Central Coast’s CAGR and 0.28 percent below the California average. A summary of this information is presented in Figure 1. A detailed comparison of population growth indexed to specific years for various time-periods are presented in Appendix Tables 1-7.

**Figure 1**  
**Comparison of Compound Annual Growth Rates**

Year	Rate of Growth			SLO County vs. Other Regions	
	SLO County	Central Coast	California	SLO County /Central Coast	SLO County /California
1970-1990	3.64%	2.12%	2.01%	+1.48%	+2.16%
1990-2005	1.29%	1.06%	1.41%	+0.23%	-0.12%
1995-2005	1.38%	1.27%	1.50%	+0.11%	-0.12%
2000-2005	1.26%	0.97%	1.54%	+0.29%	-0.28%

Source: US Census and DOF

Second, the numeric change of population was analyzed for each region (Figure 2). The data suggests that during the high growth period of 1970 to 1990, SLO County averaged a population increase of approximately 5,500 per year. This represents 34.4 percent of the Central Coast’s average annual population change of 16,100 during the same time period. Examining the last 15 years, SLO County average annual numeric growth slowed considerably, averaging a population increase of approximately 3,000 per year. This represents approximately 29 percent of the new population growth in the Central Growth region. Over the last ten and five-year time period, the average annual numeric growth has ranged between 3,400 to 3,200 representing approximately 26 percent and 31 percent of the average numeric growth in the Central Coast, respectively.

**Figure 2**  
**Comparison of Average Numeric Growth Rates**

Year	Persons		SLO County vs. Other Regions
	SLO County	Central Coast	SLO County /Central Coast
1970-1990	5,560	16,168	34.4%
1990-2005	3,087	10,769	28.7%
1995-2005	3,389	13,080	25.9%
2000-2005	3,201	10,422	30.7%

Source: US Census and DOF

Third, each region was analyzed as a share of the larger region or regions that it is a part of. For example, in 1970 the SLO County population represented 17.19 percent of the Central Coast population and 0.53 percent of the California population. In 2005, the SLO County population represents 23.90 percent of the Central Coast population and 0.72 percent of the California population. Figure 3 presents a comparison of the regional shares of total population. Since 1990, SLO County has ranged from 23.48 to 23.64 percent of the Central Coast population, on average, over the 15 year, 10 year, and 5 year time reference periods. Over each analyzed time period during the last 15 years, SLO County has consistently averaged approximately 0.72 percent of the California population. A detailed comparison of SLO County population growth (numeric) in contrast to shares of regions and State growth are presented in Appendix Tables 8-14.

**Figure 3**  
**Comparison of Regional Shares**

Year	SLO County /Central Coast	SLO County /California	Central Coast/California
1970-1990	20.41%	0.65%	3.17%
1990-2005	23.48%	0.72%	3.08%
1995-2005	23.64%	0.72%	3.06%
2000-2005	23.62%	0.72%	3.04%

Source: US Census and DOF

There are many other important factors when examining historic population changes over time. However, we have presented two that appear to have had a dramatic effect on population growth within SLO County . The rate of natural increase (births minus deaths) has decreased dramatically since 1970. Figure 4

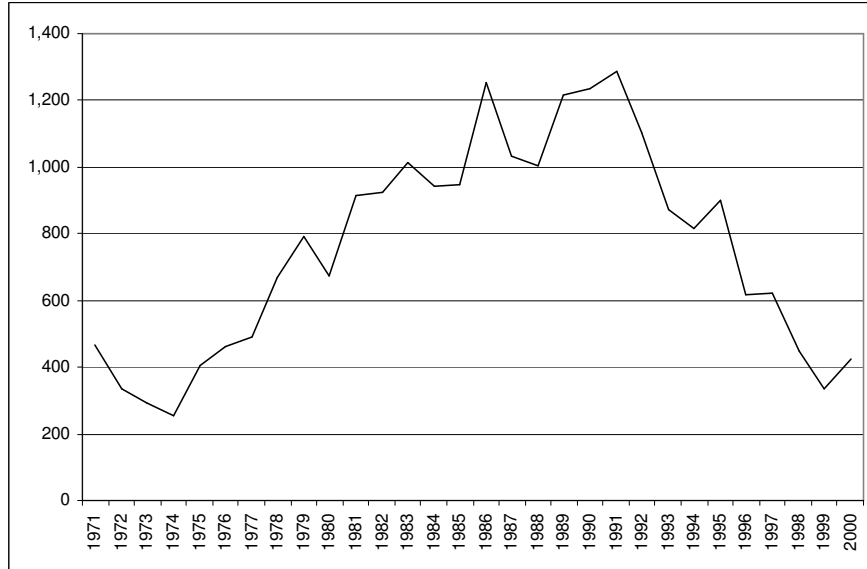
shows how the annual natural increase peaked around 1991 and has been declining since that time.

Figure 5 presents the total numeric annual growth for the years 1990 to 2000, as shares of the natural increase and net migration. The data further suggests that as the natural increase has declined, net migration has accounted for the majority of population growth in the region since the early 1990s. This is contrast to most parts of the state where natural increase accounts for more than half of local population growth. In SLO County, net migration is consistently accounting for between 60 and 80 percent of total population growth in any given year.

By examining Census data from 1990 and 2000, it becomes clear that the population in SLO County is becoming older (Figure 6) As a result, it is assumed that domestic in-migration will continue to change the demographic composition of the County (as opposed to natural increase). According to the Economic Outlook 2006 report, SLO County's median age has risen from 35.2 years to 38.5 years in the last 10 years. Other important information regarding age, income, and education levels in SLO County are presented in Appendix Tables 15-20.

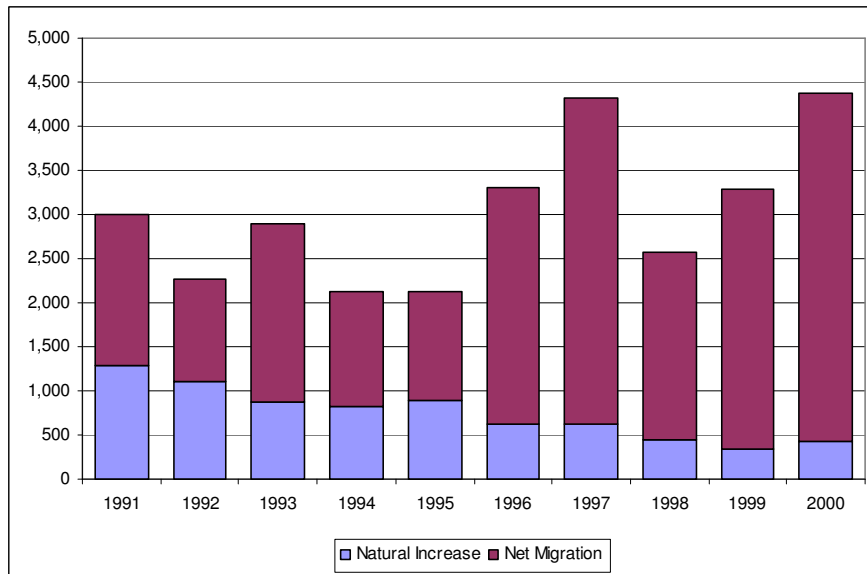
As suggested in the Economic Outlook 2006 report (from the University of California Santa Barbara), changes within these population cohorts will affect future dynamics of growth patterns in the County. Moreover, the household size has continued to decline in SLO County since 2000. Currently it is well below the Central Coast and State level (Appendix Tables 21-23). Finally, if it is assumed that growth will be fueled by on older populous, arriving via in-migration, then available housing units, future construction activity, and housing prices will have a significant affect on determining the rate of future population growth within the County. For more information regarding housing units, residential building activity, and housing prices please see Appendix Tables 26-31.

**Figure 4**  
**Natural Increase presented as Annual Growth in SLO County**



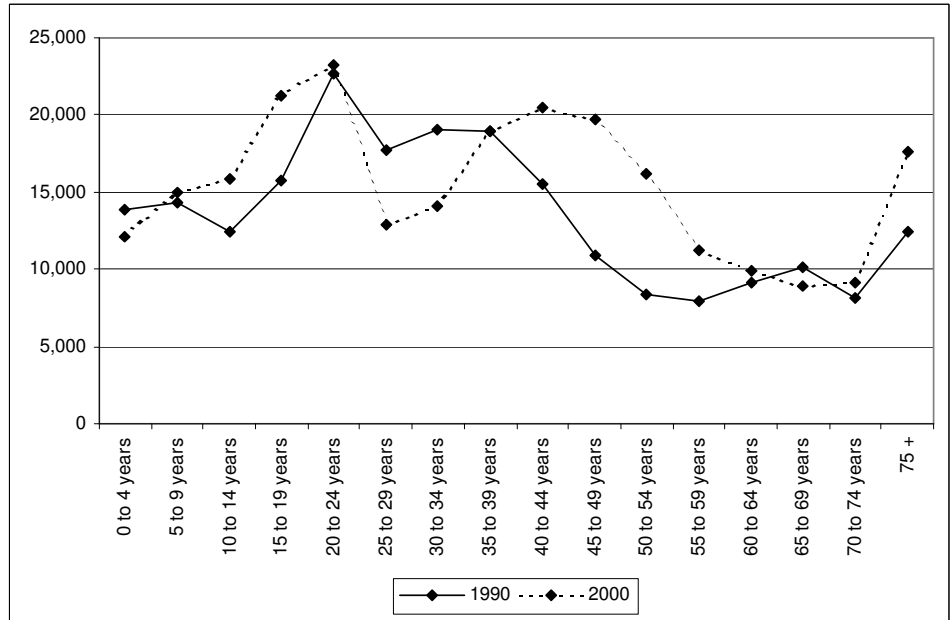
Source: DOF

**Figure 5**  
**Population Growth – Net Migration vs. Natural Increase**



Source: DOF

**Figure 6**  
**SLO Percent of Population by Age Group – 1990 and 2000**



Source: US Census

### ***Projected Population Growth in California***

Using a variety of data sources, ERA has collected five of the most recent and thorough population projections for the State of California. Along with the US Census Bureau and DOF reports by the University of Southern California (USC) and the Public Policy Institute of California (PPIC) were utilized. Data presented in Figure 7 represent the actual population forecasts. Figure 8 presents the implied numerical growth in 5-year increments to make the data compatible with the desired time frame of the regional traffic model.

**Figure 7**  
**California Growth Projections - Actual**

Year	DOF	Census	USC	PPIC High	PPIC Low
2005	36,688,807	36,688,807	36,688,807	37,000,000	37,000,000
2010	39,246,767	38,464,953	-	-	-
2015	-	40,123,232	-	-	-
2020	43,851,741	42,206,743	44,351,650	-	-
2025	-	44,305,177	-	-	-
2030	48,110,671	46,444,861	49,589,749	48,000,000	44,000,000
<i>CAGR</i>	<i>1.09%</i>	<i>0.95%</i>	<i>1.21%</i>	<i>1.05%</i>	<i>0.70%</i>

Source: DOF, US Census, PPIC, USC, and ERA

**Figure 8**  
**California Growth Projections - Implied**

Year	DOF	Census	USC	PPIC High	PPIC Low	Average
2005	36,688,807	36,688,807	36,688,807	37,000,000	37,000,000	36,688,807
2010	39,246,767	38,464,953	38,967,743	38,977,109	38,304,687	39,291,250
2015	40,889,963	40,123,232	41,388,236	41,059,866	39,655,379	41,206,369
2020	43,851,741	42,206,743	44,351,650	43,253,916	41,053,699	43,533,628
2025	45,572,185	44,305,177	46,689,610	45,565,206	42,501,327	44,926,701
2030	48,110,671	46,444,861	49,589,749	48,000,000	44,000,000	47,229,056
<i>CAGR</i>	<i>1.09%</i>	<i>0.95%</i>	<i>1.21%</i>	<i>1.05%</i>	<i>0.70%</i>	<i>1.02%</i>

Source: DOF, US Census, PPIC, USC, and ERA

As noted above, SLO County’s population has remained at 0.72 percent of the total California population over the last 15 years. Combining statistical trends of growth patterns within the County and State, ERA estimates that it is appropriate to use a fair share estimate of 0.71 percent of future state population growth. The medium growth rate is the average projected implied growth for all studies by five-year time periods. The low state growth scenario was taken from Census projections while the high state growth scenario was taken from USC’s projections. Using SLO County’s fair share of projected California population growth yields the various levels of future population as presented in Figure 9. These assumptions suggest that over the next 25 years SLO County can expect to add a population between approximately 70,000 and 90,000 or between 2,700 to 3,600 people annually.

**Figure 9**  
**SLO County’s Projected Growth as Fair Share of Projected California State Growth**

Year	Low	Medium	High
2005	260,727	260,727	260,727
2010	273,101	274,860	276,671
2015	284,875	288,426	293,856
2020	299,668	304,899	314,897
2025	314,567	318,980	331,496
2030	329,759	335,326	352,087
<i>CAGR</i>	<i>0.9%</i>	<i>1.0%</i>	<i>1.2%</i>
Numeric Growth	69,032	74,599	91,360
Annual Average	2,761	2,984	3,654

Source: ERA

We believe this “fair share” analysis tied to macro changes within the state is most appropriate to establish controls for population growth within the County. Implicit in statewide forecasts are projected changes for numerous variables that will affect both the state and county in the future (e.g. economy, immigration, etc.).

***Sub-County Population Growth – Historic***

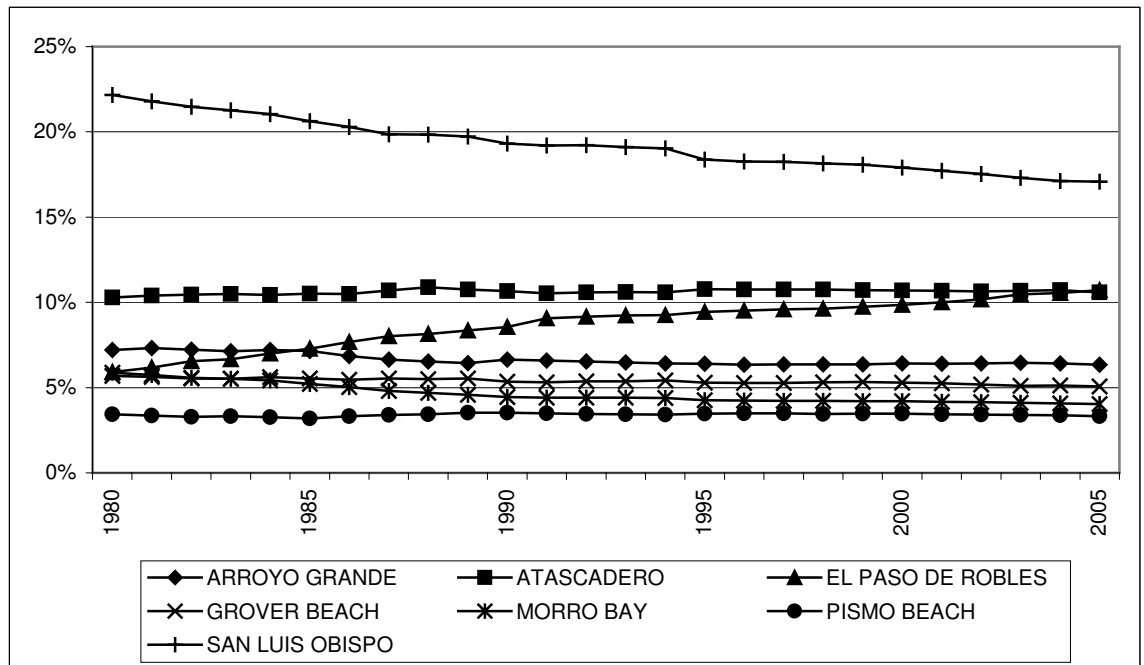
Using historical data from the DOF, Figure 10 presents the population and shares of the county’s total population by incorporated and unincorporated areas. As noted in the table, the city’s shares have remained relatively consistent with a few notable exceptions. Arroyo Grande, Atascadero, Grover Beach, Morro Bay, and Pismo Beach have experienced the most consistent growth in relation to the County.

**Figure 10**  
**Population and Shares of County Total Population**

County/City	1990		1995		2000		2005	
	Pop	%/Total	Pop	%/Total	Pop	%/Total	Pop	%/Total
Arroyo Grande	14,432	6.6%	14,650	6.4%	15,851	6.4%	16,537	6.3%
Atascadero	23,138	10.7%	24,700	10.8%	26,411	10.7%	27,596	10.6%
El Paso De Robles	18,583	8.6%	21,650	9.4%	24,297	9.8%	27,964	10.7%
Grover Beach	11,602	5.3%	12,150	5.3%	13,067	5.3%	13,228	5.1%
Morro Bay	9,664	4.5%	9,750	4.3%	10,350	4.2%	10,511	4.0%
Pismo Beach	7,669	3.5%	7,975	3.5%	8,551	3.5%	8,644	3.3%
San Luis Obispo	41,958	19.3%	42,100	18.4%	44,179	17.9%	44,519	17.1%
Incorporated Total	127,046	58.5%	132,975	58.0%	142,706	57.9%	148,999	57.1%
Unincorporated Total	90,116	41.5%	96,225	42.0%	103,975	42.1%	111,728	42.9%
County Total	217,162	100.0%	229,200	100.0%	246,681	100.0%	260,727	100.0%

Source: DOF

**Figure 11**  
**City Population as Share of County Total Population (1980 – 2005)**



Source: DOF

Over the last 15 years Paso Robles and the unincorporated areas of the County have gained in their respective population shares. In particular, Paso Robles has jumped from 8.6 Percent of the total SLO County population in 1990 to approximately 10.7 percent in 2005. Figure 11 presents the incorporated city population trends, as shares of SLO, since 1980 in a graphical format.

The CAGR for the cities within SLO County vary. As noted, the largest growth since 1990 has occurred in Paso Robles. During the last 15-years the city has experienced an annual population increase of approximately 2.76 percent. The second largest annual growth occurred in the unincorporated areas of the County. Overall, these two areas drove SLO County’s population growth. The largest growth within the other incorporated areas occurred in Atascadero. All other areas were below the average 1.07 percent growth for the incorporated areas as a whole. Similar trends occurred in the 10-year period between 1995 and 2005. One notable exception was increased growth in Arroyo Grande. Since 2000, the overall CAGR have been down in all areas with the exception of Paso Robles and the unincorporated areas of the County.

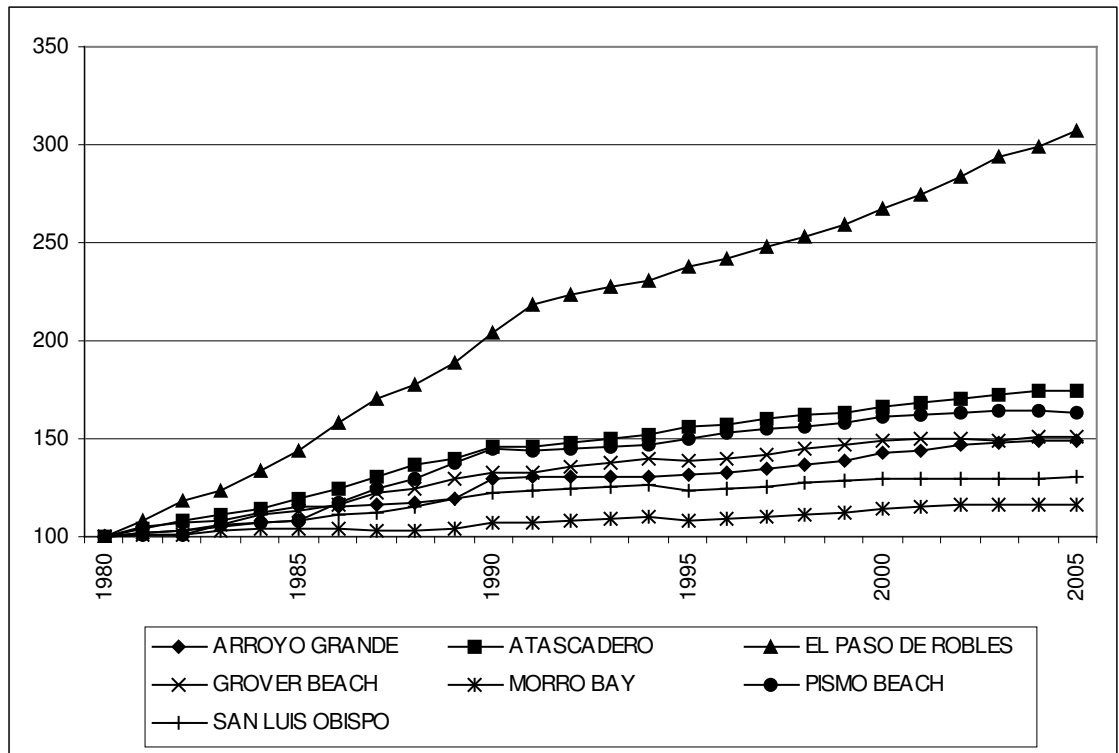
**Figure 12**  
**Compound Annual Growth Rates for Sub-County Areas**

County/City	1990-2005	1995-2005	2000-2005
Arroyo Grande	0.91%	1.22%	0.85%
Atascadero	1.18%	1.11%	0.88%
El Paso De Robles	2.76%	2.59%	2.85%
Grover Beach	0.88%	0.85%	0.25%
Morro Bay	0.56%	0.75%	0.31%
Pismo Beach	0.80%	0.81%	0.22%
San Luis Obispo	0.40%	0.56%	0.15%
Incorporated Total	1.07%	1.14%	0.87%
Unincorporated Total	1.44%	1.50%	1.45%
County Total	1.23%	1.30%	1.11%

Source: DOF

Figure 13 presents SLO County’s incorporated areas growth since 1980. Once again, while all areas have shown consistent increases in population, Paso Robles is the area in which the most significant growth has occurred. The data indexed all growth to 1980 (benchmarked at 100) and presents the growth relative to the percent increase, rather than the numeric population gains. Paso Robles has the largest numeric share of population growth and it also has the largest relative growth among all areas in SLO County. The population since 1990 alone has increased by 50 percent.

**Figure 13**  
**City Population Growth Indexed to 1980**  
 Indexed to 1990 = 100



Source: DOF

As presented in Figure 14, SLO has averaged approximately 14,500 in population growth, per five-year time period, since 1990. The largest growth, by average five-year period, occurred between 1995 and 2005. The areas with their respective gains are presented to give historical context to population growth by incorporated area. Some areas have shown variance, while others have remained consistent. Each areas historic performance has been incorporated into the projected population growth.

**Figure 14**  
**Average Five-Year Population Growth for Sub-County Areas**

County/City	1990-2005	1995-2005	2000-2005
Arroyo Grande	702	944	686
Atascadero	1,486	1,448	1,185
El Paso De Robles	3,127	3,157	3,667
Grover Beach	542	539	161
Morro Bay	282	381	161
Pismo Beach	325	335	93
San Luis Obispo	854	1,210	340
Incorporated Total	7,318	8,012	6,293
Unincorporated Total	7,204	7,752	7,753
Total	14,522	15,764	14,046

Source: DOF

***Sub-County Population Growth – Projected***

The ERA projected growth in SLO County is based on the following methodology. First, using the previously discussed “top-down” countywide forecast of growth we established a control for predicted growth within the region based on a low, medium, and high growth scenario. Second, ERA interviewed planners from incorporated areas within the County as well as planners from the unincorporated County areas to discuss areas where population growth is expected to occur. The representatives also provided ERA with general timeframes for when the population growth is expected to take place. Third, the information collected was analyzed and compared against the historical findings previously presented as well as data presented in the Appendix of this report. The results of this effort are presented in Figures 15-17. It is important to note that due to rounding totals do not add.



**Figure 15**  
**Low Population Projection by Area (2030)**

Planning Area or Community	2005 2010 2015 2020 2025 2030						CAGR	2010 2015 2020 2025 2030					Total	Percent of Total Growth	
	2005	2010	2015	2020	2025	2030		2010	2015	2020	2025	2030			
<b>Incorporated Cities</b>															
Arroyo Grande	16,330	17,050	17,800	18,600	19,200	20,000	0.81%	730	750	800	600	800	3,680	5.3%	
Atascadero	25,940	27,040	28,090	29,590	30,980	32,480	0.90%	1,100	1,050	1,500	1,390	1,500	6,540	9.5%	
Grover Beach	13,100	13,500	13,880	14,330	14,630	14,880	0.51%	400	380	450	300	250	1,780	2.6%	
Morro Bay	10,310	10,660	10,910	11,210	11,560	11,910	0.58%	350	250	300	350	350	1,600	2.3%	
Paso Robles	27,580	29,490	31,480	33,460	36,520	38,920	1.39%	1,910	1,990	1,970	3,070	2,400	11,340	16.4%	
Pismo Beach	8,620	8,870	9,220	9,620	10,020	10,370	0.74%	250	350	400	400	350	1,750	2.5%	
SLO City	42,660	43,750	44,650	45,800	46,700	47,800	0.46%	1,090	900	1,150	900	1,100	5,140	7.4%	
<b>Total</b>	<b>144,540</b>	<b>150,360</b>	<b>156,030</b>	<b>162,610</b>	<b>169,610</b>	<b>176,360</b>	<b>0.80%</b>	<b>5,830</b>	<b>5,670</b>	<b>6,570</b>	<b>7,010</b>	<b>6,750</b>	<b>31,830</b>	<b>46.1%</b>	
<b>Unincorporated Area</b>															
<b>North Coast</b>															
Cambria	6,500	6,690	6,900	7,110	7,320	7,750	0.71%	200	200	210	220	430	1,260	1.8%	
Cayucos	3,070	3,220	3,310	3,420	3,460	3,560	0.59%	150	90	120	40	100	500	0.7%	
Estero (Rural)	1,190	1,240	1,260	1,290	1,290	1,320	0.42%	50	20	30	0	30	130	0.2%	
Los Osos	14,160	15,060	15,710	16,460	17,210	17,710	0.90%	900	650	750	750	500	3,550	5.1%	
North Coast (Rural)	850	880	900	920	920	940	0.40%	30	20	20	0	20	90	0.1%	
<b>Total</b>	<b>25,770</b>	<b>27,090</b>	<b>28,080</b>	<b>29,200</b>	<b>30,200</b>	<b>31,280</b>	<b>0.78%</b>	<b>1,330</b>	<b>980</b>	<b>1,130</b>	<b>1,010</b>	<b>1,080</b>	<b>5,530</b>	<b>8.0%</b>	
<b>North County</b>															
Adelaida	3,200	3,600	4,050	4,550	5,050	5,550	2.23%	400	450	500	500	500	2,350	3.4%	
El Pomar / Esrella	8,150	8,650	9,460	11,560	13,120	14,300	2.27%	500	810	2,100	1,560	1,180	6,150	8.9%	
Lake Nacimiento	3,150	3,250	3,550	4,050	4,160	4,350	1.30%	100	300	500	110	190	1,200	1.7%	
Las Pilitas	1,380	1,440	1,480	1,520	1,530	1,570	0.52%	60	30	50	10	40	190	0.3%	
Los Padres	320	340	360	380	400	420	1.09%	20	20	20	20	20	100	0.1%	
Salinas River (Rural)	4,920	5,100	5,190	5,320	5,330	5,430	0.40%	190	90	130	10	100	520	0.8%	
San Miguel	1,720	2,320	2,720	3,120	3,620	4,160	3.60%	600	400	400	500	540	2,440	3.5%	
Santa Margarita	1,330	1,680	2,030	2,380	2,900	3,700	4.18%	350	350	350	530	800	2,380	3.4%	
Shandon	1,030	1,230	1,380	1,580	1,880	2,380	3.41%	200	150	200	300	500	1,350	2.0%	
Shandon - Carrizo (Rural)	1,490	1,540	1,570	1,610	1,610	1,640	0.38%	60	30	40	0	30	160	0.2%	
Templeton	7,230	7,480	7,980	8,580	9,480	10,380	1.46%	250	500	600	900	900	3,150	4.6%	
<b>Total</b>	<b>33,920</b>	<b>36,630</b>	<b>39,770</b>	<b>44,650</b>	<b>49,080</b>	<b>53,880</b>	<b>1.87%</b>	<b>2,730</b>	<b>3,130</b>	<b>4,890</b>	<b>4,440</b>	<b>4,800</b>	<b>19,990</b>	<b>29.0%</b>	
<b>Central County</b>															
SLO (Rural)	3,630	3,880	4,050	4,250	4,750	5,060	1.34%	250	180	200	500	310	1,440	2.1%	
<b>Total</b>	<b>3,630</b>	<b>3,880</b>	<b>4,050</b>	<b>4,250</b>	<b>4,750</b>	<b>5,060</b>	<b>1.34%</b>	<b>250</b>	<b>180</b>	<b>200</b>	<b>500</b>	<b>310</b>	<b>1,440</b>	<b>2.1%</b>	
<b>South County</b>															
Avila Beach / Avila Valley	1,180	1,240	1,280	1,320	1,340	1,380	0.63%	60	40	50	10	40	190	0.3%	
Huasna - Lopez	900	1,000	1,100	1,220	1,320	1,400	1.78%	100	100	130	100	80	500	0.7%	
Nipomo	14,540	15,540	16,540	17,490	18,960	20,430	1.37%	1,000	1,000	950	1,480	1,460	6,140	8.9%	
Oceano	7,450	7,810	8,020	8,310	8,400	8,650	0.60%	360	220	280	90	250	1,200	1.7%	
San Luis Bay (Rural)	3,830	4,020	4,130	4,270	4,320	4,330	0.49%	190	110	150	50	10	500	0.7%	
South County (Rural)	9,170	9,710	10,080	10,540	10,760	11,190	0.80%	540	370	460	220	430	2,020	2.9%	
<b>Total</b>	<b>37,070</b>	<b>39,320</b>	<b>41,150</b>	<b>43,150</b>	<b>45,100</b>	<b>47,380</b>	<b>0.99%</b>	<b>2,250</b>	<b>1,840</b>	<b>2,020</b>	<b>1,950</b>	<b>2,270</b>	<b>10,550</b>	<b>15.3%</b>	
<b>Unincorporated Area Total</b>															
	100,390	106,920	113,050	121,250	129,130	137,600	1.27%	6,560	6,130	8,240	7,900	8,460	37,510	54.3%	
<b>Summary</b>															
	2005	2010	2015	2020	2025	2030	Change								
Incorporated Total	144,540	150,360	156,030	162,610	169,610	176,360	31,820								
Unincorporated Total	100,390	106,920	113,050	121,250	129,130	137,600	37,210								
Group Quarters	15,840	15,840	15,840	15,840	15,840	15,840	-								
County Total	260,770	273,120	284,920	299,700	314,580	329,800	69,030								
Numeric Growth Per Year		2,470	2,360	2,960	2,980	3,040									
Average Growth Per Year		2,760													

Source: ERA



**Figure 16**  
**Medium Population Projection by Area (2030)**

Planning Area or Community	2005						CAGR	2010						Total	Percent of Total Growth
	2005	2010	2015	2020	2025	2030		2010	2015	2020	2025	2030			
<b>Incorporated Cities</b>															
Arroyo Grande	16,330	17,100	17,930	18,730	19,330	20,300	0.87%	780	830	800	600	1,000	4,010	5.4%	
Atascadero	25,940	27,110	28,330	29,830	31,220	33,000	0.97%	1,160	1,220	1,500	1,390	1,750	7,020	9.4%	
Grover Beach	13,100	13,550	13,950	14,400	14,700	15,000	0.54%	450	400	450	300	300	1,900	2.5%	
Morro Bay	10,310	10,710	11,010	11,310	11,660	12,100	0.64%	400	300	300	350	400	1,750	2.3%	
Paso Robles	27,580	30,380	32,880	35,750	38,000	40,900	1.59%	2,800	2,500	2,880	2,250	2,850	13,280	17.8%	
Pismo Beach	8,620	8,920	9,220	9,770	10,170	10,600	0.83%	300	300	550	400	400	1,950	2.6%	
SLO City	42,660	43,910	44,910	46,110	47,010	48,200	0.49%	1,250	1,000	1,200	900	1,200	5,550	7.4%	
<b>Total</b>	<b>144,540</b>	<b>151,680</b>	<b>158,230</b>	<b>165,900</b>	<b>172,090</b>	<b>180,100</b>	<b>0.88%</b>	<b>7,140</b>	<b>6,550</b>	<b>7,680</b>	<b>6,190</b>	<b>7,900</b>	<b>35,460</b>	<b>47.5%</b>	
<b>Unincorporated Area</b>															
<b>North Coast</b>															
Cambria	6,500	6,690	6,900	7,110	7,320	7,750	0.71%	200	200	210	220	430	1,260	1.7%	
Cayucos	3,070	3,220	3,310	3,420	3,460	3,560	0.59%	150	90	120	40	100	500	0.7%	
Estero (Rural)	1,190	1,240	1,260	1,290	1,290	1,320	0.42%	50	20	30	0	30	130	0.2%	
Los Osos	14,160	15,160	15,910	16,660	17,410	17,910	0.94%	1,000	750	750	750	500	3,750	5.0%	
North Coast (Rural)	850	880	900	920	920	940	0.40%	30	20	20	0	20	90	0.1%	
<b>Total</b>	<b>25,770</b>	<b>27,190</b>	<b>28,280</b>	<b>29,400</b>	<b>30,400</b>	<b>31,480</b>	<b>0.80%</b>	<b>1,430</b>	<b>1,080</b>	<b>1,130</b>	<b>1,010</b>	<b>1,080</b>	<b>5,730</b>	<b>7.7%</b>	
<b>North County</b>															
Adelaida	3,200	3,600	4,050	4,550	5,050	5,550	2.23%	400	450	500	500	500	2,350	3.1%	
El Pomar / Esrella	8,150	8,650	9,480	11,580	13,140	14,320	2.28%	500	830	2,100	1,560	1,180	6,170	8.3%	
Lake Nacimiento	3,150	3,250	3,550	4,050	4,160	4,350	1.30%	100	300	500	110	190	1,200	1.6%	
Las Pilitas	1,380	1,440	1,480	1,520	1,530	1,570	0.52%	60	30	50	10	40	190	0.3%	
Los Padres	320	340	360	380	400	420	1.09%	20	20	20	20	20	100	0.1%	
Salinas River (Rural)	4,920	5,100	5,190	5,320	5,330	5,430	0.40%	190	90	130	10	100	520	0.7%	
San Miguel	1,720	2,420	2,970	3,470	3,970	4,510	3.93%	700	550	500	500	540	2,790	3.7%	
Santa Margarita	1,330	1,680	2,180	2,680	3,200	4,000	4.50%	350	500	500	530	800	2,680	3.6%	
Shandon	1,030	1,280	1,480	1,730	2,030	2,530	3.66%	250	200	250	300	500	1,500	2.0%	
Shandon - Carrizo (Rural)	1,490	1,540	1,570	1,610	1,610	1,640	0.38%	60	30	40	0	30	160	0.2%	
Templeton	7,230	7,480	8,300	9,200	10,100	11,000	1.69%	250	830	900	900	900	3,780	5.1%	
<b>Total</b>	<b>33,920</b>	<b>36,780</b>	<b>40,610</b>	<b>46,090</b>	<b>50,520</b>	<b>55,320</b>	<b>1.98%</b>	<b>2,880</b>	<b>3,830</b>	<b>5,490</b>	<b>4,440</b>	<b>4,800</b>	<b>21,440</b>	<b>28.7%</b>	
<b>Central County</b>															
SLO (Rural)	3,630	3,880	4,070	4,290	4,790	5,100	1.37%	250	190	230	500	310	1,480	2.0%	
<b>Total</b>	<b>3,630</b>	<b>3,880</b>	<b>4,070</b>	<b>4,290</b>	<b>4,790</b>	<b>5,100</b>	<b>1.37%</b>	<b>250</b>	<b>190</b>	<b>230</b>	<b>500</b>	<b>310</b>	<b>1,480</b>	<b>2.0%</b>	
<b>South County</b>															
Avila Beach / Avila Valley	1,180	1,240	1,280	1,320	1,340	1,380	0.63%	60	40	50	10	40	190	0.3%	
Huasna - Lopez	900	1,000	1,100	1,220	1,320	1,400	1.78%	100	100	130	100	80	500	0.7%	
Nipomo	14,540	15,740	16,840	17,740	19,210	20,680	1.42%	1,200	1,100	900	1,480	1,460	6,140	8.2%	
Oceano	7,450	7,810	8,020	8,310	8,400	8,650	0.60%	360	220	280	90	250	1,200	1.6%	
San Luis Bay (Rural)	3,830	4,020	4,130	4,270	4,320	4,330	0.49%	190	110	150	50	10	500	0.7%	
South County (Rural)	9,170	9,710	10,080	10,540	10,760	11,190	0.80%	540	370	460	220	430	2,020	2.7%	
<b>Total</b>	<b>37,070</b>	<b>39,520</b>	<b>41,450</b>	<b>43,400</b>	<b>45,350</b>	<b>47,630</b>	<b>1.01%</b>	<b>2,450</b>	<b>1,940</b>	<b>1,970</b>	<b>1,950</b>	<b>2,270</b>	<b>10,550</b>	<b>14.1%</b>	
<b>Unincorporated Area Total</b>															
<b>Total</b>	<b>100,390</b>	<b>107,370</b>	<b>114,410</b>	<b>123,180</b>	<b>131,060</b>	<b>139,530</b>	<b>1.33%</b>	<b>7,010</b>	<b>7,040</b>	<b>8,820</b>	<b>7,900</b>	<b>8,460</b>	<b>39,200</b>	<b>52.5%</b>	
<b>Change</b>															
Incorporated Total	144,540	151,680	158,230	165,900	172,090	180,100							35,560		
Unincorporated Total	100,390	107,370	114,410	123,180	131,060	139,530							39,140		
Group Quarters	15,840	15,840	15,840	15,840	15,840	15,840							-		
County Total	260,770	274,890	288,480	304,920	318,990	335,470							74,700		
Numeric Growth Per Year		2,820	2,720	3,290	2,810	3,300									
Average Growth Per Year		2,990													

Source: ERA



**Figure 17**  
**High Population Projection by Area (2030)**

Planning Area or Community	2005 2010 2015 2020 2025 2030						CAGR	2010 2015 2020 2025 2030						Total	Percent of Total Growth
	2005	2010	2015	2020	2025	2030		2010	2015	2020	2025	2030			
<b>Incorporated Cities</b>															
Arroyo Grande	16,330	17,230	18,180	19,180	19,880	20,930	1.00%	900	950	1,000	700	1,050	4,600	5.0%	
Atascadero	25,940	27,140	28,440	30,040	31,430	33,230	1.00%	1,200	1,300	1,600	1,390	1,800	7,290	8.0%	
Grover Beach	13,100	13,550	14,100	14,600	14,900	15,350	0.64%	450	550	500	300	450	2,250	2.5%	
Morro Bay	10,310	10,760	11,260	11,710	12,060	12,610	0.81%	450	500	450	350	550	2,300	2.5%	
Paso Robles	27,580	30,670	34,270	38,290	40,110	42,440	1.74%	3,100	3,600	4,020	1,830	2,330	14,880	16.3%	
Pismo Beach	8,620	8,970	9,420	10,020	10,420	11,220	1.06%	350	450	600	400	800	2,600	2.8%	
SLO City	42,660	44,560	46,860	49,370	51,450	53,830	0.93%	1,900	2,300	2,510	2,090	2,380	11,180	12.2%	
<b>Total</b>	<b>144,540</b>	<b>152,880</b>	<b>162,530</b>	<b>173,210</b>	<b>180,250</b>	<b>189,610</b>	<b>1.09%</b>	<b>8,350</b>	<b>9,650</b>	<b>10,680</b>	<b>7,060</b>	<b>9,360</b>	<b>45,100</b>	<b>49.4%</b>	
<b>Unincorporated Area</b>															
<b>North Coast</b>															
Cambria	6,500	6,690	6,900	7,110	7,320	7,750	0.71%	200	200	210	220	430	1,260	1.4%	
Cayucos	3,070	3,220	3,310	3,420	3,460	3,560	0.59%	150	90	120	40	100	500	0.5%	
Estero (Rural)	1,190	1,240	1,260	1,290	1,290	1,320	0.42%	50	20	30	0	30	130	0.1%	
Los Osos	14,160	15,060	15,710	16,500	17,250	18,170	1.00%	900	650	790	750	920	4,010	4.4%	
North Coast (Rural)	850	880	900	920	920	940	0.40%	30	20	20	0	20	90	0.1%	
<b>Total</b>	<b>25,770</b>	<b>27,090</b>	<b>28,080</b>	<b>29,240</b>	<b>30,240</b>	<b>31,740</b>	<b>0.84%</b>	<b>1,330</b>	<b>980</b>	<b>1,170</b>	<b>1,010</b>	<b>1,500</b>	<b>5,990</b>	<b>6.6%</b>	
<b>North County</b>															
Adelaida	3,200	3,600	4,050	4,550	5,050	5,550	2.23%	400	450	500	500	500	2,350	2.6%	
El Pomar / Esrella	8,150	8,650	9,480	11,680	13,480	15,480	2.60%	500	830	2,200	1,800	2,000	7,330	8.0%	
Lake Nacimiento	3,150	3,250	3,550	4,050	4,160	4,350	1.30%	100	300	500	110	190	1,200	1.3%	
Las Pilitas	1,380	1,440	1,480	1,520	1,530	1,570	0.52%	60	30	50	10	40	190	0.2%	
Los Padres	320	340	360	380	400	420	1.09%	20	20	20	20	20	100	0.1%	
Salinas River (Rural)	4,920	5,100	5,190	5,320	5,330	5,430	0.40%	190	90	130	10	100	520	0.6%	
San Miguel	1,720	2,420	3,020	3,720	4,340	5,000	4.36%	700	600	700	630	660	3,290	3.6%	
Santa Margarita	1,330	1,680	2,180	2,680	3,780	5,000	5.44%	350	500	500	1,100	1,230	3,680	4.0%	
Shandon	1,030	1,280	1,480	1,830	2,180	2,730	3.98%	250	200	350	350	550	1,700	1.9%	
Shandon - Carrizo (Rural)	1,490	1,540	1,570	1,610	1,610	1,640	0.38%	60	30	40	0	30	160	0.2%	
Templeton	7,230	7,580	8,530	9,550	10,600	12,000	2.05%	350	950	1,020	1,050	1,410	4,780	5.2%	
<b>Total</b>	<b>33,920</b>	<b>36,880</b>	<b>40,890</b>	<b>46,890</b>	<b>52,460</b>	<b>59,170</b>	<b>2.25%</b>	<b>2,980</b>	<b>4,000</b>	<b>6,010</b>	<b>5,580</b>	<b>6,730</b>	<b>25,300</b>	<b>27.7%</b>	
<b>Central County</b>															
SLO (Rural)	3,630	3,880	4,070	4,290	4,790	5,100	1.37%	250	190	230	500	310	1,480	1.6%	
<b>Total</b>	<b>3,630</b>	<b>3,880</b>	<b>4,070</b>	<b>4,290</b>	<b>4,790</b>	<b>5,100</b>	<b>1.37%</b>	<b>250</b>	<b>190</b>	<b>230</b>	<b>500</b>	<b>310</b>	<b>1,480</b>	<b>1.6%</b>	
<b>South County</b>															
Avila Beach / Avila Valley	1,180	1,240	1,280	1,320	1,340	1,380	0.63%	60	40	50	10	40	190	0.2%	
Huasna - Lopez	900	1,000	1,100	1,220	1,320	1,400	1.78%	100	100	130	100	80	500	0.5%	
Nipomo	14,540	16,340	17,890	19,790	21,790	23,700	1.97%	1,800	1,560	1,900	2,000	1,910	6,140	6.7%	
Oceano	7,450	7,810	8,020	8,310	8,400	8,650	0.60%	360	220	280	90	250	1,200	1.3%	
San Luis Bay (Rural)	3,830	4,020	4,130	4,270	4,320	4,330	0.49%	190	110	150	50	10	500	0.5%	
South County (Rural)	9,170	9,710	10,080	10,540	10,760	11,190	0.80%	540	370	460	220	430	2,020	2.2%	
<b>Total</b>	<b>37,070</b>	<b>40,120</b>	<b>42,500</b>	<b>45,450</b>	<b>47,930</b>	<b>50,650</b>	<b>1.26%</b>	<b>3,050</b>	<b>2,400</b>	<b>2,970</b>	<b>2,470</b>	<b>2,720</b>	<b>10,550</b>	<b>11.6%</b>	
<b>Unincorporated Area Total</b>															
<b>Total</b>	<b>100,390</b>	<b>107,970</b>	<b>115,540</b>	<b>125,870</b>	<b>135,420</b>	<b>146,660</b>	<b>1.53%</b>	<b>7,610</b>	<b>7,570</b>	<b>10,380</b>	<b>9,560</b>	<b>11,260</b>	<b>43,320</b>	<b>47.4%</b>	
<b>Change</b>															
Incorporated Total	144,540	152,880	162,530	173,210	180,250	189,610	45,070								
Unincorporated Total	100,390	107,970	115,540	125,870	135,420	146,660	46,270								
Group Quarters	15,840	15,840	15,840	15,840	15,840	15,840	-								
County Total	260,770	276,690	293,910	314,920	331,510	352,110	91,340								
Numeric Growth Per Year		3,180	3,440	4,200	3,320	4,120									
Average Growth Per Year		3,650													

Source: ERA

## Section II. Employment Projection

### ***Introduction***

The following section presents the process in which the low, medium, and high employment growth scenarios SLO County were determined. Unlike long-term population forecasting, which is more reliable because there is a deterministic element to the process (e.g. forecasters can predict with a high level of certainty how many people will die during the next 20-years), long-term employment projections are more unreliable because of the uncertainty involved in accurately predicting future economic trends. Most long-term economic forecasts simply assume that present growth rates will continue at a set rate into the future. However, widespread changes in technology, politics, and foreign economic development, for example, may have a profound impact on the local, state and national economy.

Once again, the purpose of this analysis is to establish a “top-down” countywide target for employment growth in SLO County through 2030 linked to projected employment in California. In this section we will report past employment trends in the County, discuss economic issues that appear most likely to affect the local economy in the future, and discuss predicted employment growth on the State level. Finally, we will establish a rate of employment growth that is likely for the County. Other relevant historical socioeconomic demographic data and supporting information that informed this analysis is presented in a tabular or graphical format in the Appendix.

### ***County Employment Trends - Historic***

The California Employment Development Department (EDD) provides historic employment estimates in SLO County, Central Coast, and the state of California. All EDD statistical information is taken from Labor Market Information (LMI) data sets. It is important to note that for this analysis, all employment counts are from the perspective of jobs within SLO County (or what is sometimes referred to as “in place employment”). All figures report the total non-farm employment for industries for the County.

Employment change within the County is examined on numerous levels, including: CAGR between specific time intervals, numeric changes in employment from the previous year, relative share between regions (i.e., SLO County share of the Central Coast), and indexed growth rates to compare and chart relative growth trends between study areas (as presented in the Appendix). By examining these basic factors, many trends become evident

During the last five, ten, and 15 year time period, the County experienced relative employment growth at a higher rate than both the Central Coast and California.

During the 15-year time period, the CAGR for SLO County was 1.97 percent. In comparison the Central Coast and California had a CAGR of 1.21 and 1.13 percent, respectively. Since 1995, the County employment CAGR reached 2.75 percent annually. During the last five years (since 2000), however, SLO County’s employment growth rate declined from previous levels, averaging a 1.34 percent CAGR. Following a similar trend since 1990, the County remained 0.65 percentage points above the Central Coast’s CAGR and 0.94 percent above the California average over the last five years. A summary of this information is presented in Figure 18.

**Figure 18**  
**Comparison of Compound Annual Growth Rates**

Year	Rate of Growth			SLO County vs. Other Regions	
	SLO County	Central Coast	California	SLO County /Central Coast	SLO County /California
1990 - 2005	1.97%	1.21%	1.13%	+0.75%	+0.84%
1995 - 2005	2.75%	1.95%	1.76%	+0.79%	+0.99%
2000 - 2005	1.34%	0.69%	0.41%	+0.65%	+0.94%

Source: EDD

The average annual numeric change of non-farm employment in SLO County was analyzed for each region (Figure 19). The data suggests that during the employment period of 1995 to 2005, SLO averaged an employment increase of approximately 2,400 per year. This represents 34 percent of the Central Coast’s average annual employment change of 7,000 during the same time period. Examining the last 15 years, SLO County average annual numeric growth is lower, averaging an employment increase of approximately 1,700 per year. This represents approximately 38.5 percent of the new job growth in the Central Growth region over the historic 15-year time period. Over the last five-year time period, the average annual numeric growth is even lower (1,300). However, the share represented (48 percent of Central Coast) is the highest of each time period analyzed.

**Figure 19**  
**Comparison of Average Numeric Growth Rates**

Year	Non-Farm Jobs		SLO County vs. Other Regions
	SLO County	Central Coast	SLO County/Central Coast
1990 - 2005	1,700	4,413	38.52%
1995 - 2005	2,390	7,030	34.00%
2000 - 2005	1,300	2,720	47.79%

Source: EDD

Finally, each region was analyzed as a share of the larger region or regions that it is apart of. For example, between 1990 and 2005 the SLO County employment base averaged 23.73 percent of the Central Coast total employment and 0.64 percent of the California employment. During the last five years, the SLO County total employment averaged 24.91 percent of the Central Coast’s total employment and 0.67 percent of the California population. Since 1990, the share of SLO County’s employment has been steadily increasing at a slow rate. Figure 20 presents a comparison of the regional shares of total employment. For detailed data regarding non-farm employment in the County please refer to Appendix 34.

**Figure 20**  
**Comparison of Relative Regional Shares**

Year	SLO County /Central Coast	Central Coast/California	SLO County /California
1990 - 2005	23.73%	2.68%	0.64%
1995 - 2005	24.34%	2.68%	0.65%
2000 - 2005	24.91%	2.70%	0.67%

Source: EDD

***Projected Industry Changes and Employment Shares***

In an “Occasional Paper” titled “California’s Economic Future and Infrastructure Challenges” published by the Public Policy Institute of California (PPIC) on June 2, 2005, the author, David Neumark examines employment forecasts by the EDD, UCLA-Anderson (UCLA), and the Department of Transportation (Caltrans). Two of the forecasts, the UCLA and Caltrans, extend to 2020, with the EDD forecast extends only to 2010. The industry projections across all three forecasts have some common features.

Most noteworthy is the forecasted decline in manufacturing jobs, with the share of jobs in manufacturing predicted to decline 15 to 24 percent as of 2010, and 29 to 36 percent by 2020 (Figure 21). It is important to note that these are predicted shares of employment, rather than the level of employment. In contrast, the projections suggest sharp increases in employment services, with the share growing by 7 to 11 percent by 2010, and 15 to 17 percent by 2020. Aside from these major changes, the forecasts tend to point to declining employment shares of mining, construction, and transportation, communications, and public utilities. The projected trends in trade, government, and for finance, insurance and real estate are predicted to remain constant (center around zero percent change).

**Figure 21**  
**Projected Changes in Non-Farm Employment by Industry**

	Shares of Employment				% Change in Share, 1990 - 2000	% Change in Share, 2000 - 2010	% Change in Share, 2000 - 2020
	1990	2000	2010	2020			
<b>UCLA - Anderson (2002)</b>							
Mining	0.3	0.2	0.1	0.1	-47.8	-9.8	-25.9
Construction	4.5	5.0	4.8	4.3	11.6	-4.9	-15.1
Manufacturing	16.5	13.4	11.0	9.6	-18.7	-18.1	-28.6
Transportation, Communication, and Utilities	4.9	5.1	4.7	4.7	4.9	-8.6	-8.9
Trade	23.9	22.7	22.8	22.5	-5.0	0.3	-1.2
Finance, Insurance, Real Estate	6.5	5.7	5.7	5.9	-12.5	0.5	3.9
Services	26.7	31.8	34.9	37.4	19.1	9.7	17.3
Federal	2.9	1.9	1.6	1.6	-34.9	-12.5	-17.3
State and Local Government	13.7	14.1	14.3	14.1	3.0	1.4	-0.3
<b>California EDD (2003)</b>							
Mining		0.2	0.1			-15.2	
Construction		5.0	5.0			0.2	
Manufacturing		13.4	11.4			-15.2	
Transportation, Communication, and Utilities		5.1	4.8			-6.6	
Wholesale Trade		5.6	5.5			-2.5	
Retail Trade		17.1	16.8			-1.6	
Finance, Insurance, Real Estate		5.7	5.5			-3.8	
Services		31.9	35.4			11.0	
Government		16.0	15.5			-3.6	
<b>Caltrans Aggregated Counties (2004)</b>							
Mining and Construction		5.1	5.2	4.7		1.7	-8.0
Manufacturing		13.2	10.0	8.4		-23.8	-36.4
Transportation, Communication, and Utilities		4.9	4.7	4.4		-5.3	-9.9
Trade		22.0	22.5	23.1		2.0	4.8
Finance, Insurance, Real Estate		5.5	5.4	5.0		-0.8	-8.2
Services		30.6	32.9	35.3		7.4	15.3
Government		15.9	17.1	17.1		7.7	7.8

Source: PPIC

In order to determine how these changes might affect SLO County, we analyzed industry growth patterns since 1994. Using data provided by EDD, the relative shares of employment were determined. For comparison purposes, the total number of jobs in 2000 was aggregated by similar categories as the PPIC report. The results are presented in Figure 22.

**Figure 22**  
**Comparison of Employment Shares by Industry (2005)**

Industry	SLO County	CA	SLO/CA
Natural Resources, Mining and Construction	7.6%	6.3%	1.4%
Manufacturing	6.2%	10.2%	-4.1%
Wholesale Trade	2.6%	4.6%	-2.0%
Retail Trade	13.7%	11.2%	2.5%
Transportation, Warehousing and Utilities	3.7%	3.3%	0.4%
Information	1.6%	3.2%	-1.6%
Financial Activities	4.8%	6.3%	-1.5%
Professional and Business Services	8.7%	14.5%	-5.8%
Educational and Health Services	10.7%	10.7%	0.0%
Leisure and Hospitality	14.6%	10.0%	4.6%
Other Services	4.3%	3.5%	0.8%
Federal Government	0.6%	1.7%	-1.1%
State and Local Government	21.0%	14.6%	6.4%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>0.0%</b>

Source: EDD

The 2000 data suggests that by examining the percentage of jobs by industry, SLO is not especially susceptible to future slow downs by mix of industry type. The largest sectors, Services and Government, are predicted to experience growth and a non-declining share of employment, respectively. Similarly, manufacturing, which is predicted to experience the most significant declines, provides fewer jobs by share than the average mix of the State. One significant potential threat would be a dramatic decrease in the tourism business. With leisure and hospitality comprising such a large portion of the County’s employment, any significant declines in the tourism industry would adversely affect the SLO County job base.

To further this comparative analysis, ERA analyzed the County’s economic base characteristics by performing a location quotient. A location quotient for a particular industry is a ratio that compares the percentage of employment in a particular industry in a local economy (in this case SLO County) to the percentage of employment that same industry constitutes in a reference economy (in this case California).

The analysis indicates which industries have a comparatively larger or smaller presence in the County economy. A location quotient equal to 1.0 suggests that the share of employment in a particular industry in SLO is exactly the same as the share of employment in the same industry in the State. If the location quotient is greater than one, the County share of employment in a particular industry exceeds the State. If it is less than one, the County share of employment in an industry is less than the State. The results of the location quotient for the years 1990, 2000, and 2005 are presented below in Figure 23.

**Figure 23**  
**Location Quotient Analysis for SLO County vs. California**

	1990	2000	2005
Natural Resources, Mining and Construction	1.34	1.24	1.22
Manufacturing	0.46	0.61	0.60
Wholesale Trade	0.42	0.57	0.57
Retail Trade	1.28	1.24	1.22
Transportation, Warehousing and Utilities	1.17	0.95	1.11
Information	0.64	0.48	0.49
Financial Activities	0.73	0.71	0.76
Professional and Business Services	0.61	0.60	0.60
Educational and Health Services	0.94	0.96	1.00
Leisure and Hospitality	1.59	1.50	1.46
Other Services	1.76	1.36	1.24
Federal Government	0.32	0.45	0.35
State and Local Government	1.57	1.62	1.44

Source: EDD

The location quotient analysis suggests that the share of employment within the sectors categorized as Natural Resources, Mining and Construction, Retail Trade, Transportation, Warehousing and Utilities, Leisure and Hospitality, Other Services, and State and Local Government have a relative share that exceeds the State. In contrast, the Sectors categorized by Manufacturing, Wholesale Trade, Information, Financial Activities, and Professional and Business Services have a relative share less than the State. It appears that employment within Education and Health Services has been approximately equal to the State during the last 15 years. A shift-share examination of employment trends between 1990 and 2005 is presented in Appendix Table 35.

### ***Projected Employment Growth in California***

Using the PPIC report as our primary data source, ERA has examined three of the most recent and thorough long-term employment projections for the State of California. Data presented in Figure 24 represent the actual employment forecasts for the State. Figure 25 presents the implied numerical growth in 5-year increments to make the data compatible with the desired time frame of the regional traffic model.

**Figure 24**  
**California Growth Projections - Actual**

Year	Caltrans (Payroll Employment)	CCSCE (Total Employment)	EDD (Payroll Employment)	UCLA (Payroll Employment)
2000	14,590,000	16,300,000	14,488,000	14,488,000
2005	-	-	-	-
2010	16,440,000	20,100,000	17,709,000	17,461,000
2015	-	-	-	-
2020	19,293,000	21,800,000	-	20,412,000
2025	-	-	-	-
2030	-	-	-	-

Source: PPIC, Caltrans, CCSCE, and EDD

**Figure 25**  
**California Growth Projections – Implied**

Year	Caltrans (Payroll Employment)	CCSCE (Total Employment)	EDD (Payroll Employment)	UCLA (Payroll Employment)
2000	14,590,000	16,300,000	14,488,000	14,488,000
2005	15,487,401	18,100,552	16,017,740	15,905,187
2010	16,440,000	20,100,000	17,709,000	17,461,000
2015	17,809,462	20,932,749	19,578,835	18,878,928
2020	19,293,000	21,800,000	21,646,099	20,412,000
2025	20,900,118	22,703,181	23,931,639	22,069,566
2030	22,641,110	23,643,781	26,458,501	23,861,734
CAGR	1.48%	1.25%	2.03%	1.68%

Source: PPIC, Caltrans, CCSCE, and EDD

Consistent with the “top-down” approach, we utilized the estimates to set controls for the low, medium, and high growth scenarios in the County. The projections provided by CCSCE were not included because they provide total employment, which includes self-employed, unpaid workers, and household workers. Based on the historical data examined over the last 15 years, we expect that SLO County will continue to average 0.67 percent of the total employment for all non-farm industries in California. The employment projections utilized in this analysis include the total payroll (non-farm) employment. In order to adjust the projections to the County level, adjusted the projections to match the 2005 non-farm employment with SLO. The low, medium, and high growth scenarios are presented in Figure 26.

**Figure 26**  
**SLO County Employment Growth Projections (Non-Farm)**

Year	Low	Medium	High
2005	100,700	100,700	100,700
2010	107,082	110,079	112,031
2015	116,258	120,480	124,559
2020	126,198	131,834	138,410
2025	136,965	144,230	153,723
2030	148,630	157,764	170,653
<i>CAGR</i>	<i>1.57%</i>	<i>1.81%</i>	<i>2.13%</i>
Numeric Growth	47,930	57,064	69,953
Average Annual	1,917	2,283	2,798

Source: ERA

The low state growth scenario was taken from the Caltrans projection, the medium growth rate is the average projected implied growth for the studies by five-year time periods, while the high state growth scenario was taken from EDD’s projections. These assumptions suggest that over the next 25 years SLO could add between approximately 48,000 and 70,000 jobs or between 1,900 to 2,800 new jobs annually.

**County Employment Growth – Projected**

Using the 2005 employment shares for non-farm employment and adjusted by the projected changes in the shares of employment sectors, we have established the projected jobs by industry for each five-year study period (as presented in Figures 27 – 29). The data is presented at the County level. Without ES-202 data from EDD, the broad categories of employment by industrial classification cannot be tied to specific levels of geography. As a result, the data is allocated into TAZ by existing implied shares for each category, as it currently exists in the model. Specific areas of growth will be targeted based on conversations with regional planners from the County. Appendix Tables 36 – 38 provide additional context to the employment forecast.



**Figure 27**  
**Low County Employment Projection (2030)**

Industry	2000	2005	2010	2015	2020	2025	2030	Numeric Change	CAGR
Natural Resources, Mining and Construction	6,100	7,700	8,000	8,500	9,000	9,600	10,200	2,500	1.7%
Manufacturing	7,400	6,200	6,000	6,000	5,900	5,900	5,800	-400	-0.8%
Wholesale Trade	2,400	2,600	2,800	3,000	3,300	3,500	3,800	1,200	1.5%
Retail Trade	12,600	13,800	14,700	15,900	17,300	18,800	20,300	6,500	1.6%
Transportation, Warehousing and Utilities	3,200	3,700	3,800	4,100	4,300	4,600	4,900	1,200	1.4%
Information	1,800	1,600	1,700	1,900	2,100	2,300	2,600	1,000	1.2%
Financial Activities	3,700	4,800	5,100	5,600	6,100	6,700	7,300	2,500	2.3%
Professional and Business Services	8,800	8,800	9,600	10,800	12,000	13,400	15,000	6,200	1.8%
Educational and Health Services	8,700	10,800	11,600	12,800	14,000	15,400	16,900	6,100	2.2%
Leisure and Hospitality	13,000	14,700	15,900	17,700	19,600	21,700	24,100	9,400	2.1%
Other Services	4,300	4,300	4,600	5,000	5,400	5,900	6,400	2,100	1.3%
Government	22,400	21,800	23,000	24,800	26,800	28,900	31,200	9,400	1.1%
All Industries	94,400	100,800	106,800	116,100	125,800	136,700	148,500	47,700	1.6%
<i>Change Per 5-Year Period</i>		6,400	6,000	9,300	9,700	10,900	11,800		
<i>Change Per Year</i>		1,280	1,200	1,860	1,940	2,180	2,360		

Source: ERA



**Figure 28**  
**Medium County Employment Projection (2030)**

Industry	2000	2005	2010	2015	2020	2025	2030	Numeric Change	CAGR
Natural Resources, Mining and Construction	6,100	7,700	8,200	8,800	9,500	10,100	10,800	3,100	1.9%
Manufacturing	7,400	6,200	6,200	6,200	6,200	6,200	6,200	0	-0.6%
Wholesale Trade	2,400	2,600	2,800	3,100	3,400	3,700	4,100	1,500	1.8%
Retail Trade	12,600	13,800	15,100	16,500	18,000	19,700	21,600	7,800	1.8%
Transportation, Warehousing and Utilities	3,200	3,700	4,000	4,200	4,500	4,900	5,200	1,500	1.6%
Information	1,800	1,600	1,800	2,000	2,200	2,500	2,800	1,200	1.5%
Financial Activities	3,700	4,800	5,300	5,800	6,400	7,000	7,700	2,900	2.5%
Professional and Business Services	8,800	8,800	9,900	11,100	12,600	14,100	15,900	7,100	2.0%
Educational and Health Services	8,700	10,800	11,900	13,200	14,700	16,200	18,000	7,200	2.5%
Leisure and Hospitality	13,000	14,700	16,400	18,300	20,500	22,900	25,600	10,900	2.3%
Other Services	4,300	4,300	4,700	5,200	5,700	6,200	6,800	2,500	1.5%
Government	22,400	21,800	23,700	25,800	28,000	30,500	33,100	11,300	1.3%
All Industries *	94,400	100,800	110,000	120,200	131,700	144,000	157,800	57,000	1.8%
<i>Change Per 5-Year Period</i>		6,400	9,200	10,200	11,500	12,300	13,800		
<i>Change Per Year</i>		1,280	1,840	2,040	2,300	2,460	2,760		

Source: ERA



**Figure 29**  
**High County Employment Projection (2030)**

Industry	2000	2005	2010	2015	2020	2025	2030	Numeric Change	CAGR
Natural Resources, Mining and Construction	6,100	7,700	8,400	9,100	9,900	10,800	11,700	4,000	2.2%
Manufacturing	7,400	6,200	6,300	6,400	6,500	6,600	6,700	500	-0.3%
Wholesale Trade	2,400	2,600	2,900	3,200	3,600	4,000	4,400	1,800	2.0%
Retail Trade	12,600	13,800	15,300	17,100	18,900	21,000	23,400	9,600	2.1%
Transportation, Warehousing and Utilities	3,200	3,700	4,000	4,400	4,800	5,200	5,600	1,900	1.9%
Information	1,800	1,600	1,800	2,100	2,300	2,600	3,000	1,400	1.7%
Financial Activities	3,700	4,800	5,400	6,000	6,700	7,500	8,400	3,600	2.8%
Professional and Business Services	8,800	8,800	10,100	11,500	13,200	15,100	17,200	8,400	2.3%
Educational and Health Services	8,700	10,800	12,200	13,700	15,400	17,300	19,500	8,700	2.7%
Leisure and Hospitality	13,000	14,700	16,700	18,900	21,500	24,400	27,600	12,900	2.5%
Other Services	4,300	4,300	4,800	5,300	5,900	6,600	7,300	3,000	1.8%
Government	22,400	21,800	24,100	26,600	29,400	32,500	35,800	14,000	1.6%
All Industries *	94,400	100,800	112,000	124,300	138,100	153,600	170,600	69,800	2.1%
<i>Change Per 5-Year Period</i>		6,400	11,200	12,300	13,800	15,500	17,000		
<i>Change Per Year</i>		1,280	2,240	2,460	2,760	3,100	3,400		

Source: ERA

### ***Sub-County Employment Growth – Projected***

In order to estimate the employment growth at a sub-county, ERA used historical ES-202 data from 1990 to 2000 to determine relative shares of employment concentrations and land use information as presented in the current transportation model. Specifically, the ES-202 data was used to examine the historic shares of employment by sub-county area. This information allowed ERA to establish estimates for employment totals for incorporated as well as select unincorporated areas based on historical data. Information from the traffic model was utilized establish the implied pro rata employment based on the current land use within SLO County. Finally, ERA adjusted the employment figures based on both the ES-202 and land use information to establish the job estimates presented herein.

ERA once again interviewed planners from incorporated areas within the County as well as planners from the unincorporated County areas to discuss areas where employment growth is expected to occur. The representatives provided ERA with general timeframes for when intensification of employment land uses is expected to occur. The results of this effort are presented in Figures 30-32. It is important to note that due to rounding totals do not add.



**Figure 30**  
**Low Sub-Region Employment Projection (2030)**

Planning Area or Community	2005	2010	2015	2020	2025	2030	CAGR	2010	2015	2020	2025	2030	Total
<b><u>Incorporated Cities</u></b>													
Arroyo Grande	7,940	8,500	9,330	10,220	11,210	12,300	1.8%	560	830	890	990	1,090	4,360
Atascadero	8,550	8,990	9,700	10,460	11,300	12,210	1.4%	440	710	760	840	910	3,660
Grover Beach	3,160	3,280	3,510	3,730	3,990	4,260	1.2%	120	230	220	260	270	1,100
Morro Bay	3,390	3,610	3,950	4,300	4,700	5,130	1.7%	220	340	350	400	430	1,740
Paso Robles	14,270	15,160	16,590	18,100	19,820	21,720	1.7%	890	1,430	1,510	1,720	1,900	7,450
Pismo Beach	3,160	3,390	3,730	4,090	4,500	4,940	1.8%	230	340	360	410	440	1,780
SLO City	42,010	44,490	48,460	52,530	57,060	61,900	1.6%	2,480	3,970	4,070	4,530	4,840	19,890
<b>Total</b>	<b>82,500</b>	<b>87,400</b>	<b>95,300</b>	<b>103,400</b>	<b>112,600</b>	<b>122,500</b>	<b>1.6%</b>	<b>4,900</b>	<b>7,900</b>	<b>8,200</b>	<b>9,200</b>	<b>9,900</b>	<b>40,000</b>
<b><u>Unincorporated Areas</u></b>													
Rural County	4,370	4,430	4,650	4,850	5,120	5,360	0.8%	60	220	200	270	240	990
Avila Beach/Avila Valley	450	490	560	590	650	710	1.8%	40	70	30	60	60	260
Cambria	1,890	2,020	2,220	2,430	2,670	2,920	1.8%	130	200	210	240	250	1,030
Cayucos	60	70	70	80	80	90	1.6%	10	0	10	0	10	30
Los Osos	1,240	1,310	1,440	1,580	1,730	1,890	1.7%	70	130	140	150	160	650
Lake Nacimiento	30	30	40	40	40	50	2.1%	0	10	0	0	10	20
Nipomo	2,420	2,560	2,800	3,050	3,330	3,640	1.6%	140	240	250	280	310	1,220
Oceano	510	540	590	640	690	750	1.6%	30	50	50	50	60	240
San Miguel	400	420	460	500	540	590	1.6%	20	40	40	40	50	190
Santa Margarita	540	580	630	690	740	810	1.6%	40	50	60	50	70	270
Templeton	3,100	3,420	3,910	4,430	5,040	5,730	2.5%	320	490	520	610	690	2,630
<b>Total</b>	<b>15,000</b>	<b>15,900</b>	<b>17,400</b>	<b>18,900</b>	<b>20,600</b>	<b>22,500</b>	<b>1.6%</b>	<b>900</b>	<b>1,500</b>	<b>1,500</b>	<b>1,800</b>	<b>1,900</b>	<b>7,500</b>
<b>Total</b>	<b>97,500</b>	<b>103,300</b>	<b>112,600</b>	<b>122,300</b>	<b>133,200</b>	<b>145,000</b>	<b>1.6%</b>	<b>5,800</b>	<b>9,400</b>	<b>9,700</b>	<b>11,000</b>	<b>11,800</b>	<b>47,500</b>

Note 1: Total does not include jobs related to secondary or non K-12 related education professions

Note 2: Estimates rounded, total may not add

Source: ERA



**Figure 31**  
**Medium Sub-Region Employment Projection (2030)**

Planning Area or Community	2005	2010	2015	2020	2025	2030	CAGR	2010	2015	2020	2025	2030	Total
<u>Incorporated Cities</u>													
Arroyo Grande	7,940	8,760	9,670	10,690	11,790	13,040	2.0%	820	910	1,020	1,100	1,250	5,100
Atascadero	8,550	9,250	10,050	10,930	11,890	12,950	1.7%	700	800	880	960	1,060	4,400
Grover Beach	3,160	3,380	3,620	3,900	4,200	4,530	1.5%	220	240	280	300	330	1,370
Morro Bay	3,390	3,720	4,080	4,500	4,940	5,450	1.9%	330	360	420	440	510	2,060
Paso Robles	14,270	15,610	17,150	18,920	20,870	23,060	1.9%	1,340	1,540	1,770	1,950	2,190	8,790
Pismo Beach	3,160	3,490	3,850	4,270	4,740	5,260	2.1%	330	360	420	470	520	2,100
SLO City	42,010	45,950	50,360	55,230	60,360	66,040	1.8%	3,940	4,410	4,870	5,130	5,680	24,030
<i>Total</i>	82,500	90,200	98,800	108,400	118,800	130,300	1.8%	7,700	8,600	9,700	10,400	11,500	47,900
<u>Unincorporated Areas</u>													
Rural County	4,370	4,550	4,800	5,090	5,380	5,690	1.1%	180	250	290	290	310	1,320
Avila Beach/Avila Valley	450	500	550	620	680	760	2.1%	50	50	70	60	80	310
Cambria	1,890	2,080	2,300	2,540	2,810	3,100	2.0%	190	220	240	270	290	1,210
Cayucos	60	70	70	80	80	90	1.6%	10	0	10	0	10	30
Los Osos	1,240	1,350	1,490	1,650	1,810	2,010	2.0%	110	140	160	160	200	770
Lake Nacimiento	30	30	40	40	50	50	2.1%	0	10	0	10	0	20
Nipomo	2,420	2,630	2,890	3,180	3,490	3,850	1.9%	210	260	290	310	360	1,430
Oceano	510	560	610	670	730	800	1.8%	50	50	60	60	70	290
San Miguel	400	430	470	520	570	620	1.8%	30	40	50	50	50	220
Santa Margarita	540	590	650	710	790	860	1.9%	50	60	60	80	70	320
Templeton	3,100	3,540	4,060	4,680	5,340	6,140	2.8%	440	520	620	660	800	3,040
<i>Total</i>	15,000	16,300	17,900	19,800	21,700	24,000	1.9%	1,300	1,600	1,900	2,000	2,200	9,000
<i>Total</i>	97,500	106,500	116,700	128,200	140,500	154,300	1.9%	9,000	10,200	11,600	12,400	13,700	56,900

Note 1: Total does not include jobs related to secondary or non K-12 related education professions

Note 2: Estimates rounded, total may not add

Source: ERA



**Figure 32**  
**High Sub-Region Employment Projection (2030)**

Planning Area or Community	2005	2010	2015	2020	2025	2030	CAGR	2010	2015	2020	2025	2030	Total
<b><u>Incorporated Cities</u></b>													
Arroyo Grande	7,940	8,910	9,990	11,200	12,570	14,100	2.3%	970	1,080	1,210	1,370	1,530	6,160
Atascadero	8,550	9,410	10,380	11,450	12,660	13,970	2.0%	860	970	1,070	1,210	1,310	5,420
Grover Beach	3,160	3,440	3,750	4,090	4,480	4,890	1.8%	280	310	340	390	410	1,730
Morro Bay	3,390	3,780	4,220	4,710	5,260	5,880	2.2%	390	440	490	550	620	2,490
Paso Robles	14,270	15,880	17,740	19,860	22,250	24,890	2.3%	1,610	1,860	2,120	2,390	2,640	10,620
Pismo Beach	3,160	3,530	3,970	4,470	5,040	5,660	2.4%	370	440	500	570	620	2,500
SLO City	42,010	46,910	52,220	58,120	64,680	71,790	2.2%	4,900	5,310	5,900	6,560	7,110	29,780
<b>Total</b>	<b>82,480</b>	<b>91,860</b>	<b>102,270</b>	<b>113,900</b>	<b>126,940</b>	<b>141,180</b>	<b>2.2%</b>	<b>9,400</b>	<b>10,400</b>	<b>11,600</b>	<b>13,000</b>	<b>14,200</b>	<b>58,700</b>
<b><u>Unincorporated Areas</u></b>													
Rural County	4,370	4,630	4,940	5,300	5,710	6,120	1.4%	260	310	360	410	410	1,750
Avila Beach/Avila Valley	450	510	570	640	730	820	2.4%	60	60	70	90	90	370
Cambria	1,890	2,120	2,370	2,660	2,990	3,350	2.3%	230	250	290	330	360	1,460
Cayucos	60	70	70	80	90	100	2.1%	10	0	10	10	10	40
Los Osos	1,240	1,380	1,540	1,720	1,930	2,160	2.2%	140	160	180	210	230	920
Lake Nacimiento	30	30	40	40	50	50	2.1%	0	10	0	10	0	20
Nipomo	2,420	2,670	2,990	3,330	3,720	4,150	2.2%	250	320	340	390	430	1,730
Oceano	510	570	630	700	780	860	2.1%	60	60	70	80	80	350
San Miguel	400	440	490	540	600	670	2.1%	40	50	50	60	70	270
Santa Margarita	540	610	680	750	840	930	2.2%	70	70	70	90	90	390
Templeton	3,100	3,620	4,220	4,930	5,750	6,710	3.1%	520	600	710	820	960	3,610
<b>Total</b>	<b>15,010</b>	<b>16,650</b>	<b>18,540</b>	<b>20,690</b>	<b>23,190</b>	<b>25,920</b>	<b>2.2%</b>	<b>1,600</b>	<b>1,900</b>	<b>2,200</b>	<b>2,500</b>	<b>2,700</b>	<b>10,900</b>
<b>Total</b>	<b>97,500</b>	<b>108,500</b>	<b>120,800</b>	<b>134,600</b>	<b>150,100</b>	<b>167,100</b>	<b>2.2%</b>	<b>11,000</b>	<b>12,300</b>	<b>13,800</b>	<b>15,500</b>	<b>16,900</b>	<b>69,600</b>

Note 1: Total does not include jobs related to secondary or non K-12 related education professions

Note 2: Estimates rounded, total may not add

Source: ERA



## Appendices

The following appendices contain additional relevant information concerning this project.

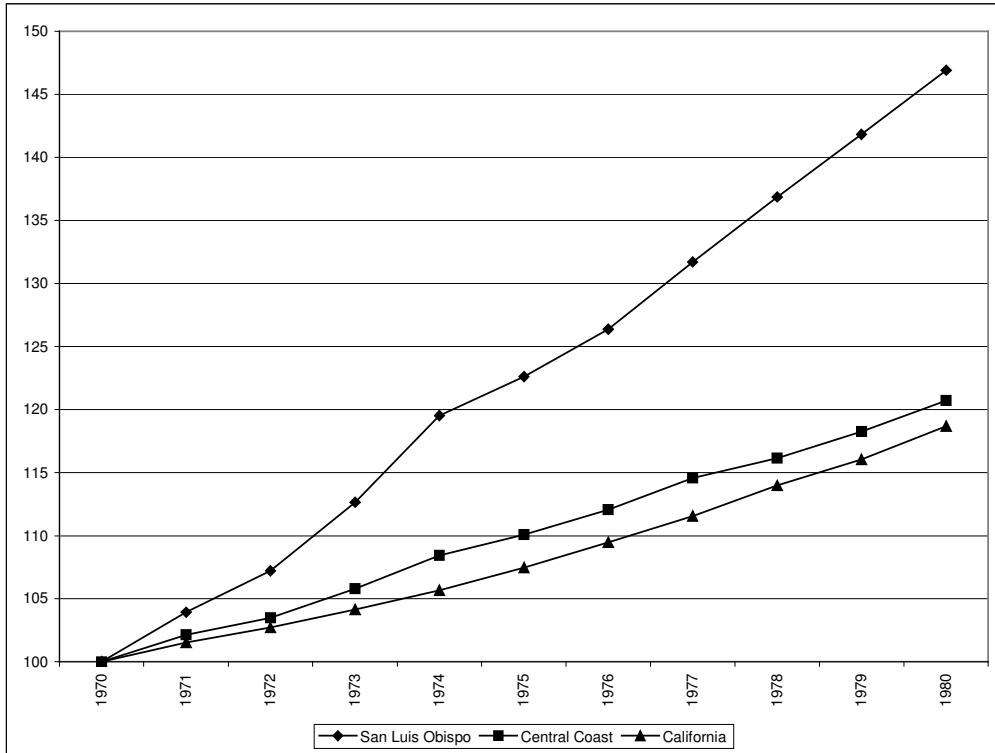
### List of Appendices

- Appendix 1 – Population Growth 1970 – 1980
- Appendix 2 – Population Growth 1980 – 1990
- Appendix 3 – Population Growth 1990 – 2000
- Appendix 4 – Population Growth 1970 – 2005
- Appendix 5 – Population Growth 1990 – 2005
- Appendix 6 – Population Growth 1995 – 2005
- Appendix 7 – Population Growth 2000 – 2005
- Appendix 8 – SLO Annual Numeric Change as Percentage of California Numeric Change
- Appendix 9 – Central Coast Population Growth
- Appendix 10 – SLO Population Growth as Percentage of Central Coast
- Appendix 11 – SLO population as Percentage of California Population
- Appendix 12 – SLO Population Change by Year
- Appendix 13 – SLO Percentage of Population by Year
- Appendix 14 – SLO Population Growth Indexed to 1970 as Percentage of California Total Population
- Appendix 15 – SLO Age Distribution
- Appendix 16 – SLO Age-Sex Pyramid
- Appendix 17 – Income Distribution by Region
- Appendix 18 – SLO Income Distribution Comparison by Census
- Appendix 19 – Education Levels by Region
- Appendix 20 – Education Levels in SLO
- Appendix 21 – SLO Households
- Appendix 22 – Household Growth by Region
- Appendix 23 – Persons Per Household by Region
- Appendix 24 – Housing Units by Region
- Appendix 25 – Housing Unit Growth by Region
- Appendix 26 – SLO Residential Building Activity
- Appendix 27 – Residential Building Activity (Unincorporated vs. Incorporated)
- Appendix 28 – Residential Building Activity by City
- Appendix 29 – Residential Building Activity (Single Family vs. Multifamily) Data
- Appendix 30 – Housing Prices by Region
- Appendix 31 – Median Home Value Comparison by Region
- Appendix 32 – Housing Prices Comparison by Region
- Appendix 33 – City Level Real Estate
- Appendix 34 – Non-Farm Employment by Region
- Appendix 35 – Shift Share Analysis
- Appendix 36 – Non Farm Employment by Sector
- Appendix 37 – Retail Sales by Type
- Appendix 38 – All Retail Sales

### Appendix 1 – Population Growth 1970 – 1980

Indexed to 1970 = 100

Source: DOF and ERA

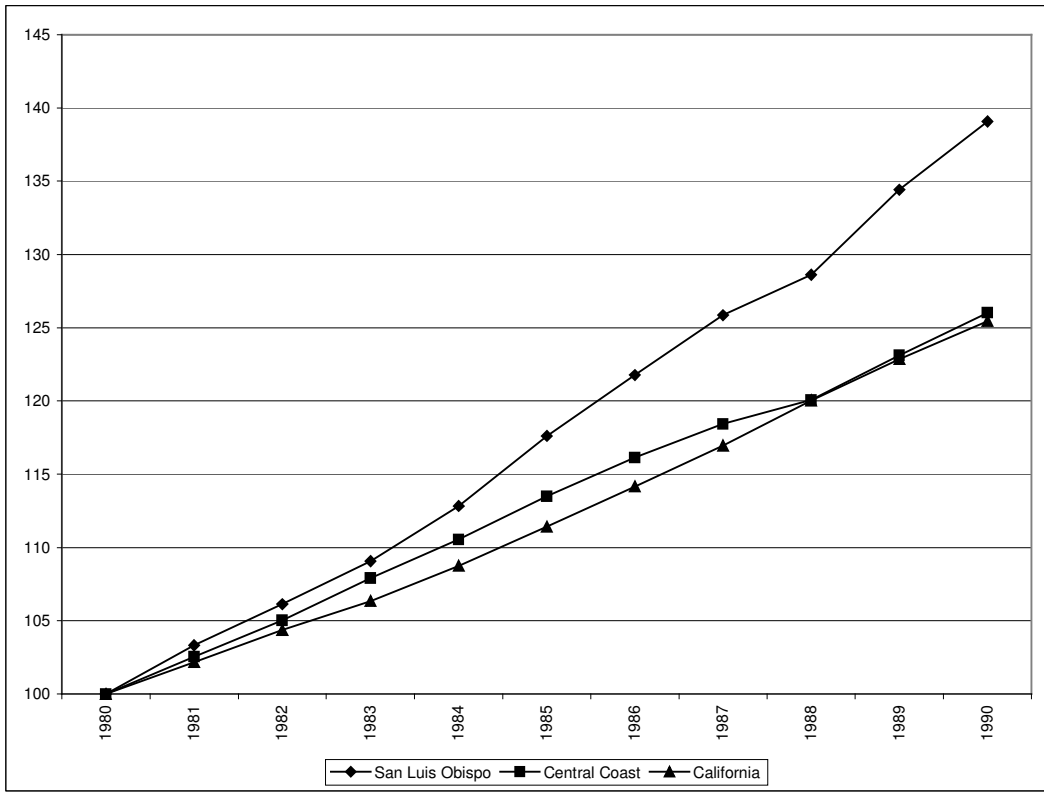


	CAGR
SLO	3.92%
CC	1.90%
CA	1.73%

## Appendix 2 – Population Growth 1980 – 1990

Indexed to 1980 = 100

Source: DOF and ERA

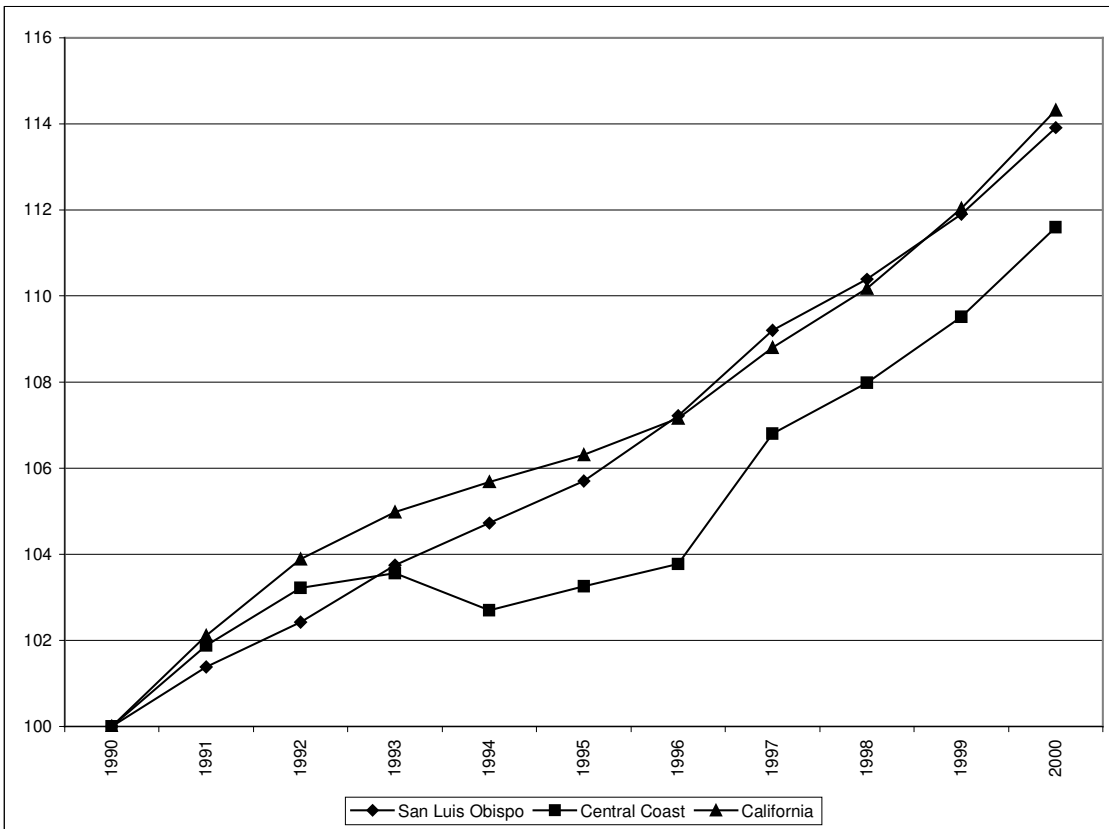


	CAGR
SLO	3.35%
CC	2.34%
CA	2.29%

### Appendix 3 – Population Growth 1990 – 2000

Indexed to 1990 = 100

Source: DOF and ERA



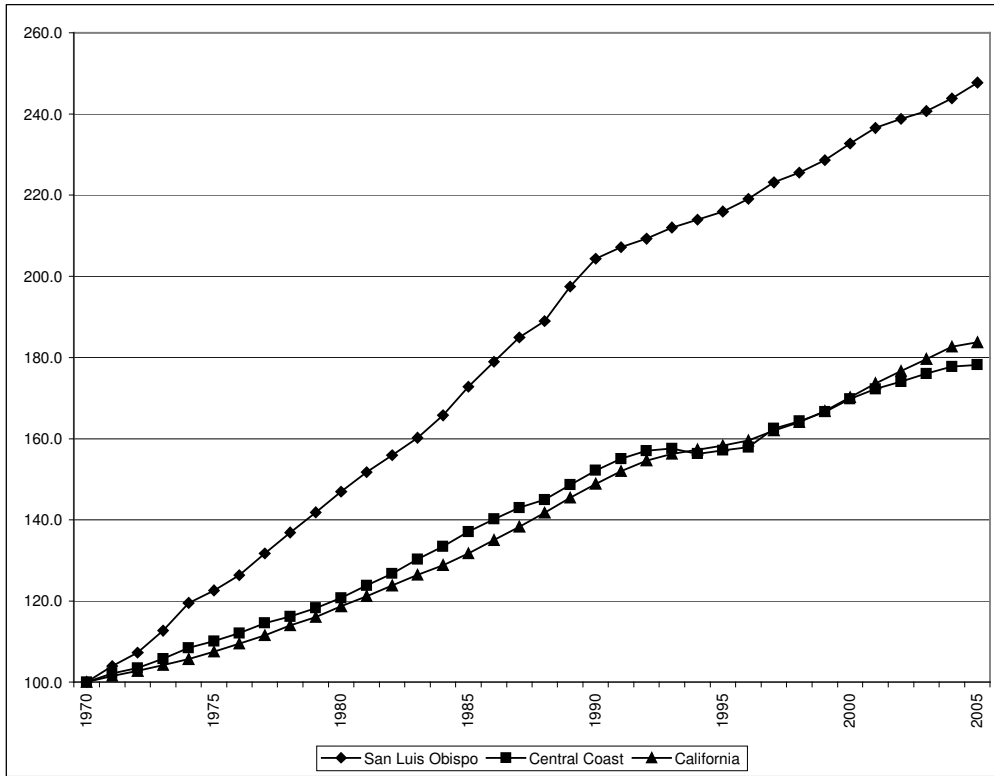
	CAGR
SLO	1.31%
CC	1.10%
CA	1.35%



### Appendix 4 – Population Growth 1970 – 2005

Indexed to 1970 = 100

Source: DOF and ERA

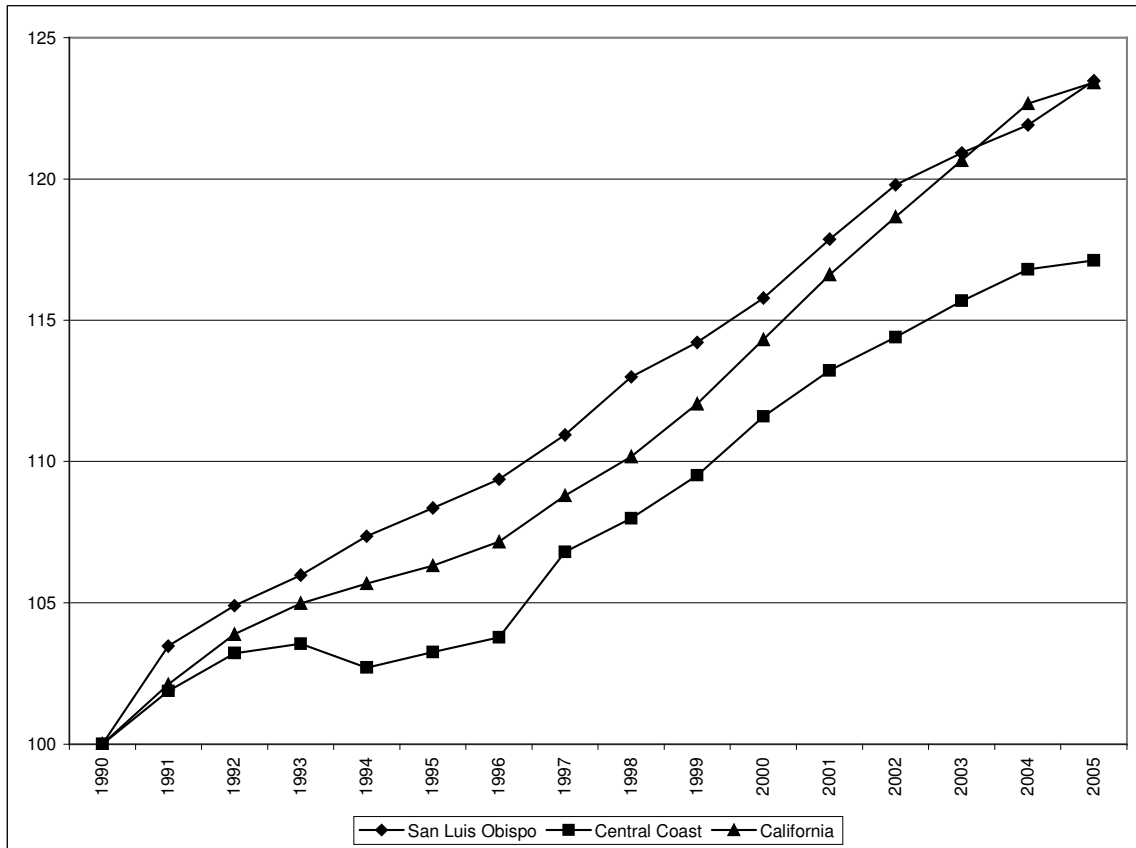


	CAGR
SLO	2.63%
CC	1.66%
CA	1.75%

### Appendix 5 – Population Growth 1990 – 2005

Indexed to 1990 = 100

Source: DOF and ERA

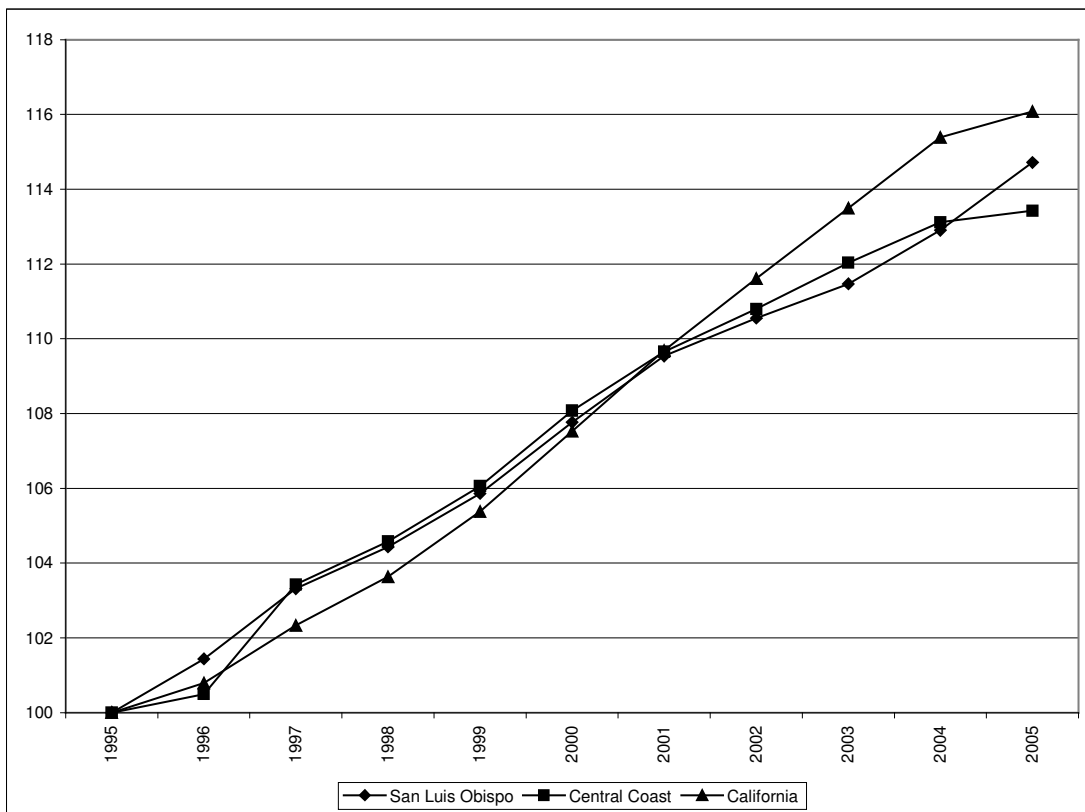


	CAGR
SLO	1.29%
CC	1.06%
CA	1.14%

### Appendix 6 – Population Growth 1995 – 2005

Indexed to 1995 = 100

Source: DOF and ERA

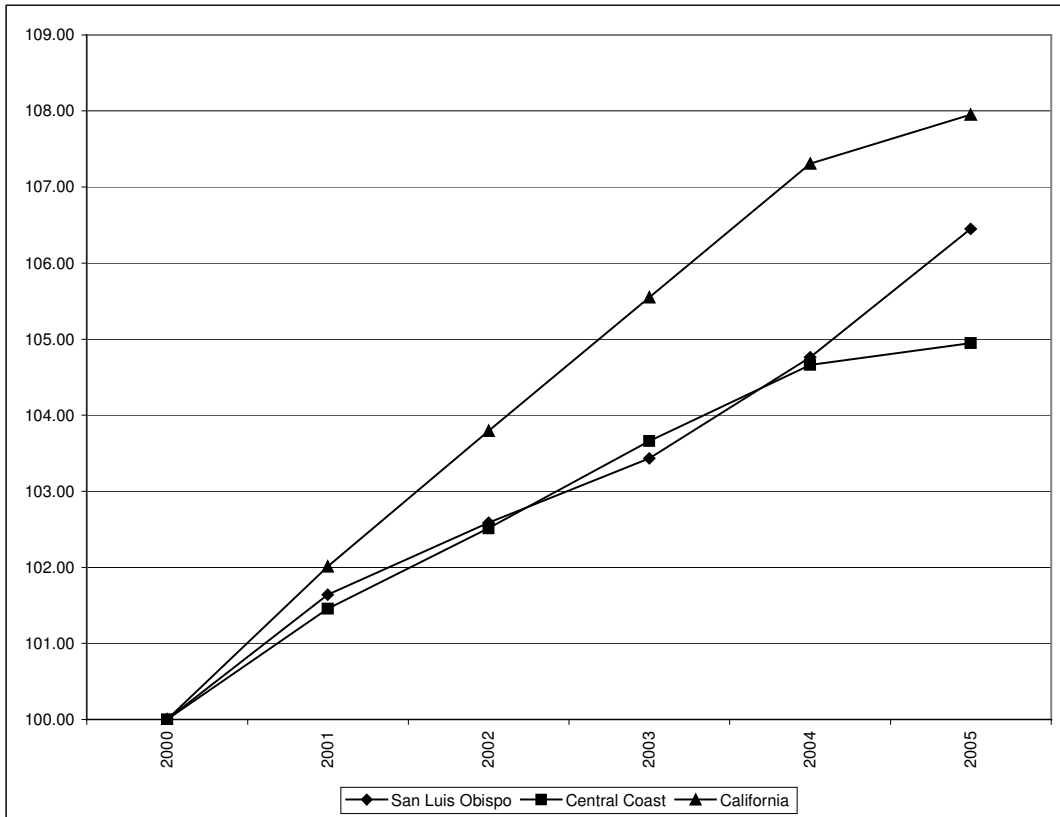


	CAGR
SLO	1.38%
CC	1.27%
CA	1.50%

### Appendix 7 – Population Growth 2000 – 2005

Indexed to 2000 = 100

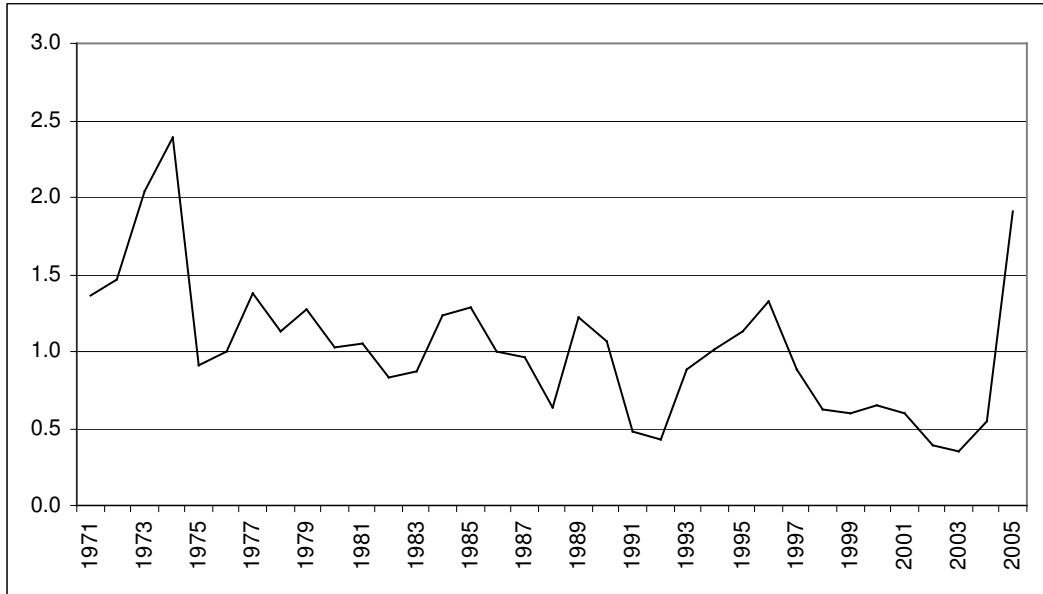
Source: DOF and ERA



	CAGR
SLO	1.26%
CC	0.97%
CA	1.54%

**Appendix 8 – SLO County Annual Numeric Change as Percentage of California Numeric Change**

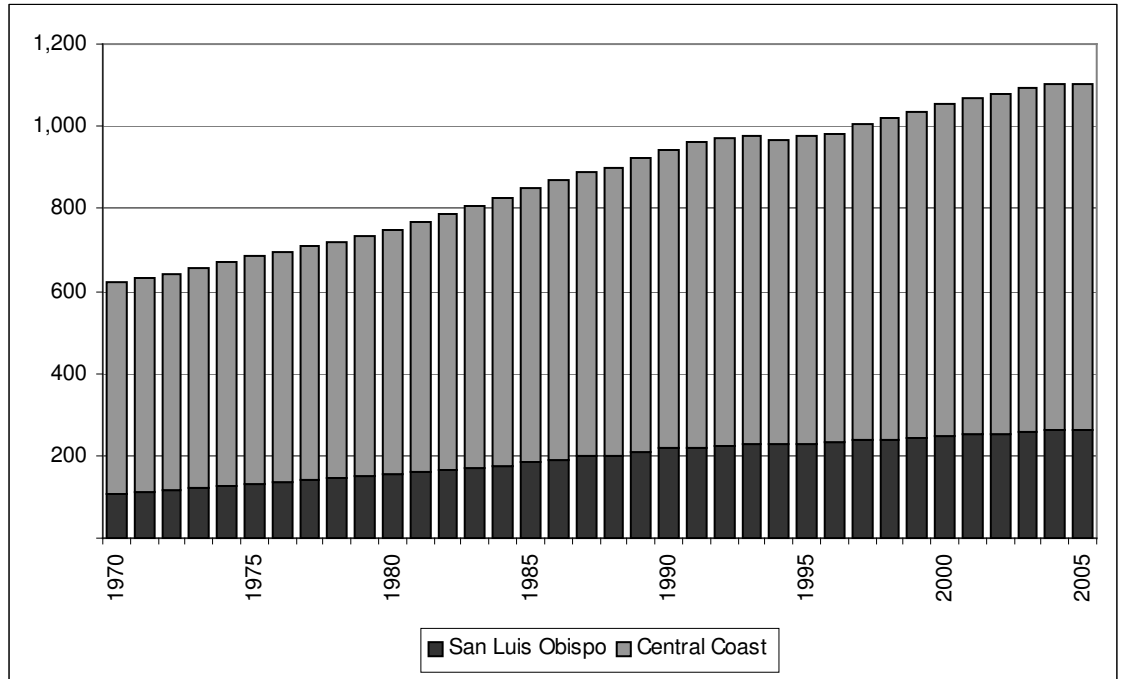
Source: DOF and ERA



**Appendix 9 – Central Coast Population Growth**

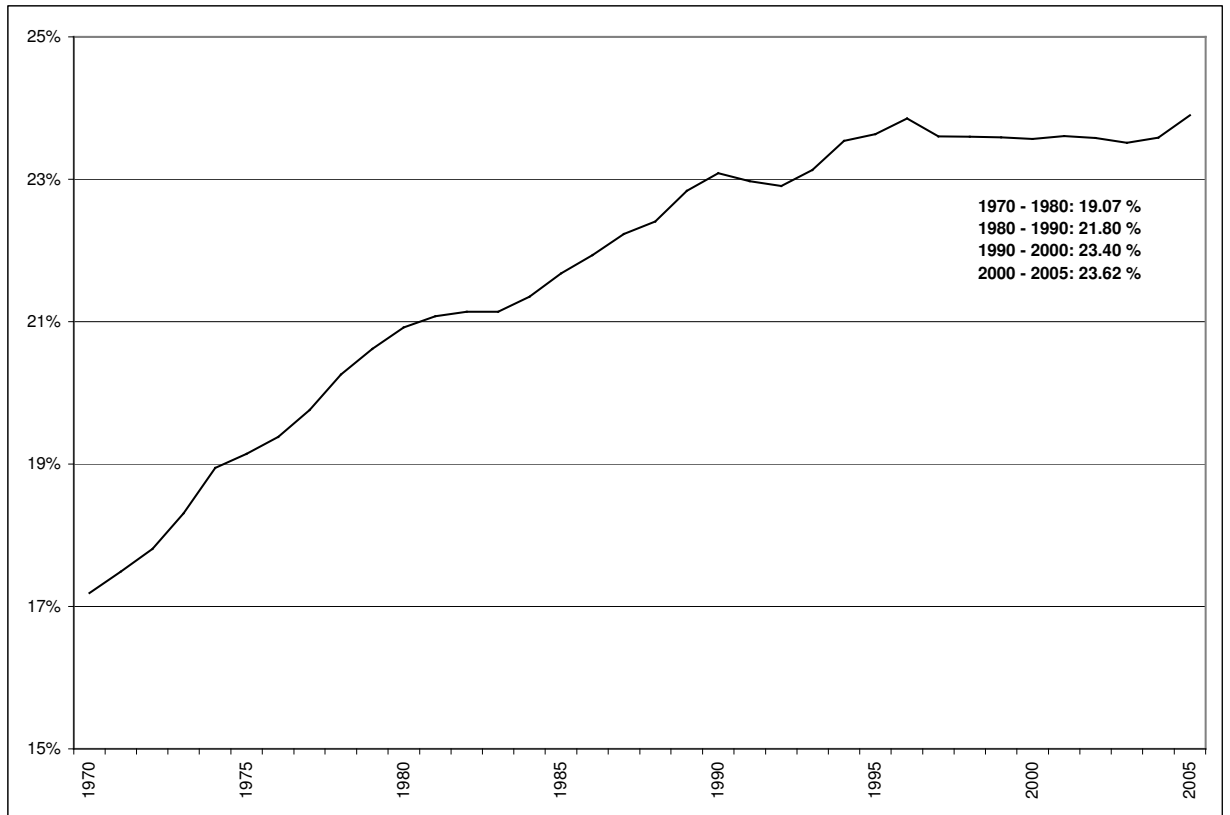
1970 – 2005 (Thousands)

Source: DOF and ERA



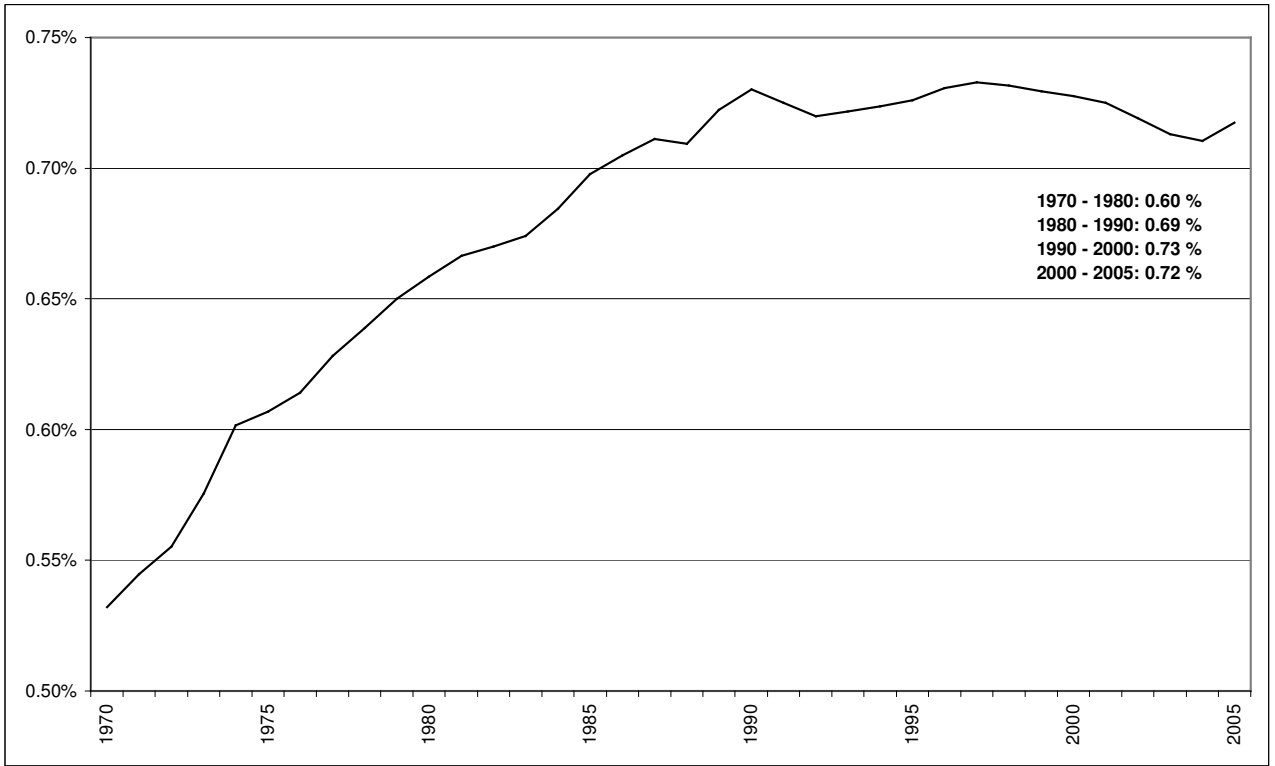
## Appendix 10 – SLO County Population Growth as Percentage of Central Coast

Source: DOF and ERA

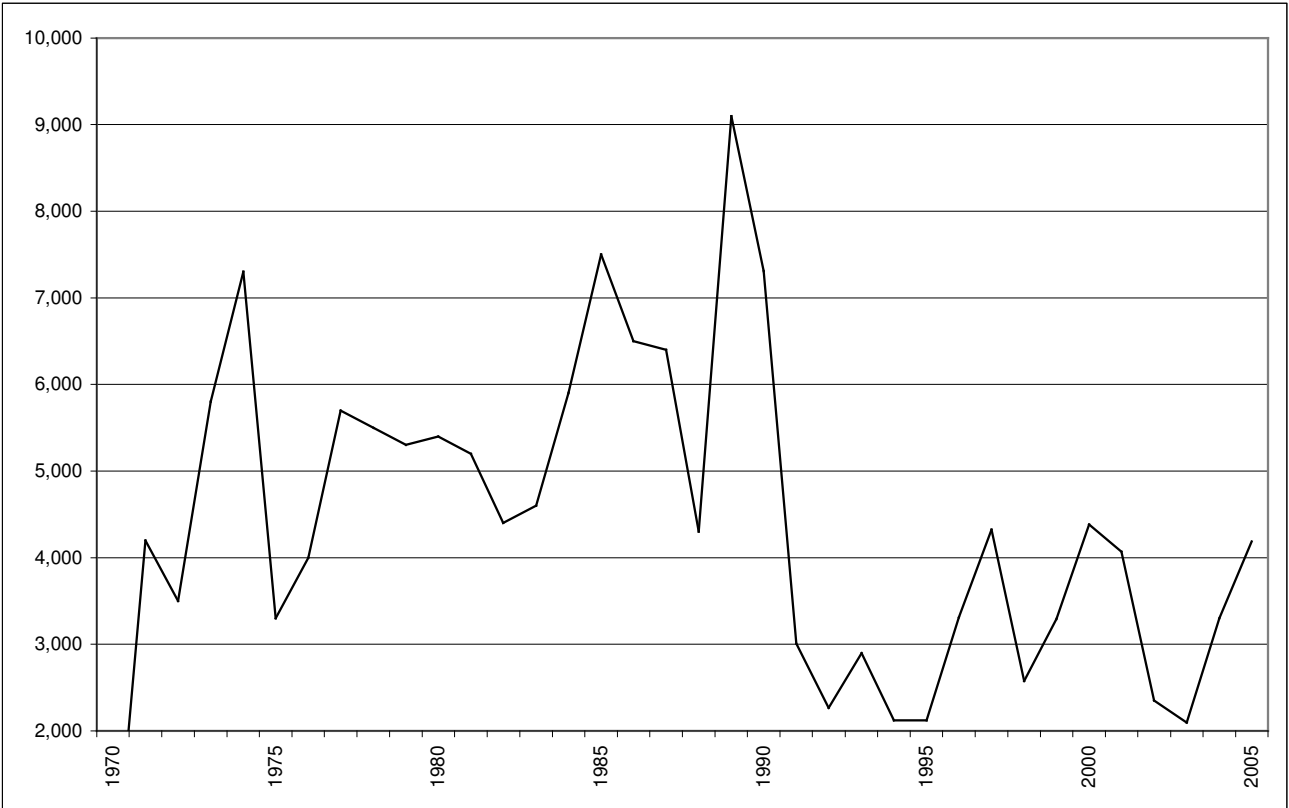


### Appendix 11 – SLO County population as Percentage of California Population

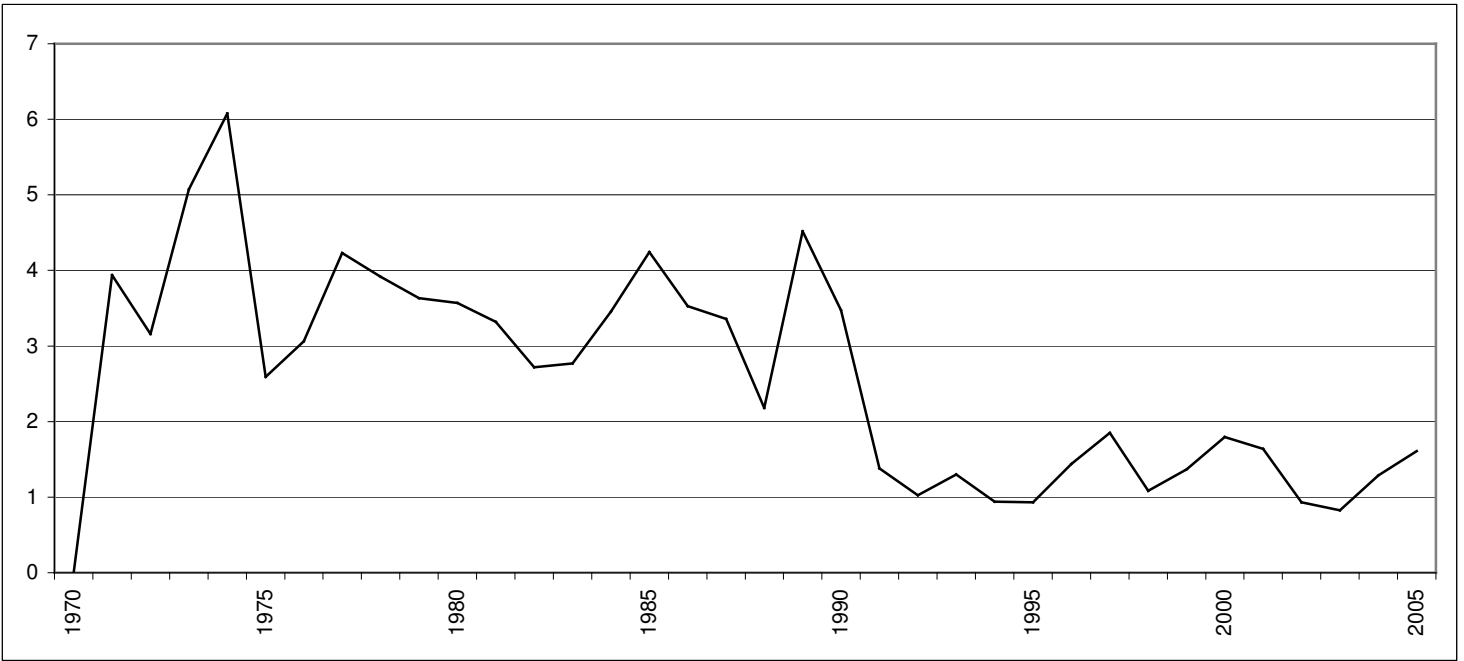
Source: DOF and ERA



**Appendix 12 – SLO County Population Change by Year**  
1970 – 2005  
Source: DOF and ERA



**Appendix 13 – SLO County Percentage of Population by Year**  
1970 – 2005  
Source: DOF and ERA



### Appendix 14 – SLO County Population Growth Indexed to 1970 as Percentage of California Total Population

Source: DOF and ERA





## Appendix 15 – SLO County Age Distribution

1990 & 2000

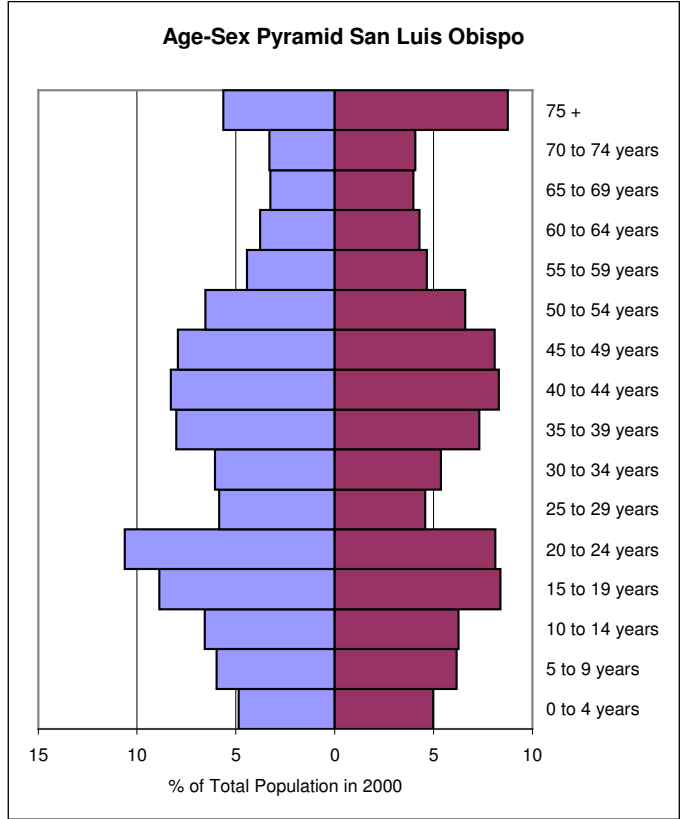
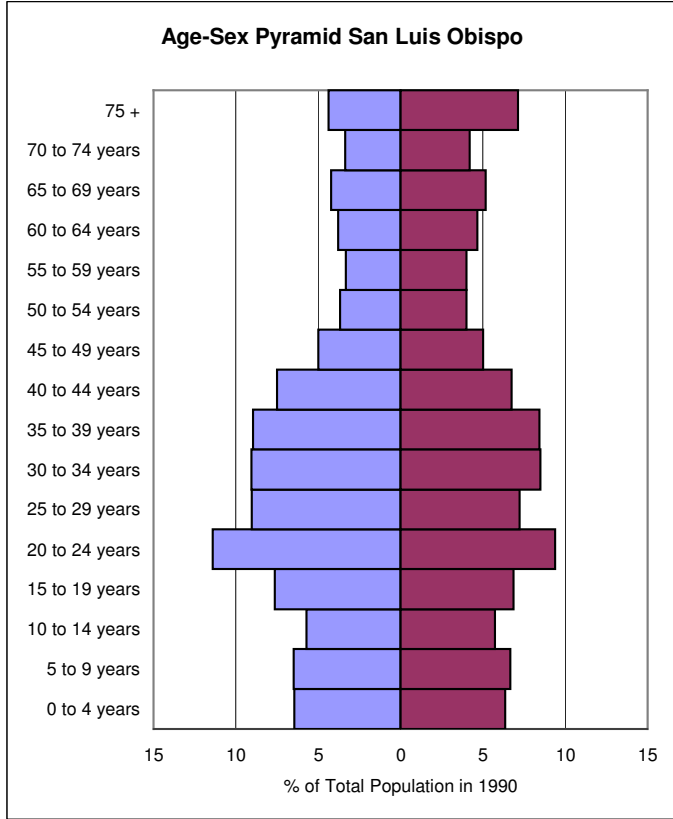
Source: US Census and ERA

	1990					2000				
	Male	Female	Total	% of Total	Ratio P/HH	Male	Female	Total	% of Total	Ratio P/HH
<b>SAN LUIS OBISPO</b>										
0 to 4 years	7,233	6,669	13,902	6.40	0.17	6,156	6,001	12,157	4.93	0.13
5 to 9 years	7,259	7,009	14,268	6.57	0.18	7,558	7,406	14,964	6.07	0.16
10 to 14 years	6,396	6,018	12,414	5.72	0.15	8,324	7,531	15,855	6.43	0.17
15 to 19 years	8,552	7,203	15,755	7.25	0.20	11,218	10,090	21,308	8.64	0.23
20 to 24 years	12,782	9,875	22,657	10.43	0.28	13,432	9,769	23,201	9.41	0.25
25 to 29 years	10,123	7,583	17,706	8.15	0.22	7,394	5,516	12,910	5.23	0.14
30 to 34 years	10,144	8,919	19,063	8.78	0.24	7,647	6,471	14,118	5.72	0.15
35 to 39 years	10,053	8,857	18,910	8.71	0.24	10,138	8,803	18,941	7.68	0.20
40 to 44 years	8,419	7,080	15,499	7.14	0.19	10,477	9,973	20,450	8.29	0.22
45 to 49 years	5,593	5,272	10,865	5.00	0.14	10,031	9,729	19,760	8.01	0.21
50 to 54 years	4,131	4,195	8,326	3.83	0.10	8,265	7,953	16,218	6.57	0.17
55 to 59 years	3,731	4,188	7,919	3.65	0.10	5,597	5,608	11,205	4.54	0.12
60 to 64 years	4,243	4,890	9,133	4.21	0.11	4,768	5,147	9,915	4.02	0.11
65 to 69 years	4,720	5,436	10,156	4.68	0.13	4,123	4,800	8,923	3.62	0.10
70 to 74 years	3,756	4,412	8,168	3.76	0.10	4,193	4,904	9,097	3.69	0.10
75 +	4,914	7,507	12,421	5.72	0.15	7,128	10,531	17,659	7.16	0.19
	112,049	105,113	217,162	100	2.71	126,449	120,232	246,681	100	2.66
<b>CENTRAL COAST</b>										
0 to 4 years	37,136	35,052	72,188	7.66	0.22	35,281	33,173	68,454	6.53	0.21
5 to 9 years	34,809	32,895	67,704	7.18	0.21	40,085	38,053	78,138	7.46	0.24
10 to 14 years	29,784	28,523	58,307	6.19	0.18	39,521	36,318	75,839	7.24	0.23
15 to 19 years	37,228	32,382	69,610	7.39	0.22	43,549	40,393	83,942	8.01	0.26
20 to 24 years	53,973	41,858	95,831	10.17	0.30	50,301	41,063	91,364	8.72	0.28
25 to 29 years	48,328	38,960	87,288	9.26	0.27	39,197	31,991	71,188	6.79	0.22
30 to 34 years	45,644	40,430	86,074	9.13	0.27	39,946	34,011	73,957	7.06	0.23
35 to 39 years	40,682	36,413	77,095	8.18	0.24	43,883	39,331	83,214	7.94	0.26
40 to 44 years	33,159	30,192	63,351	6.72	0.20	42,055	39,508	81,563	7.78	0.25
45 to 49 years	23,349	22,768	46,117	4.89	0.14	36,819	36,016	72,835	6.95	0.23
50 to 54 years	18,307	18,822	37,129	3.94	0.11	30,639	29,925	60,564	5.78	0.19
55 to 59 years	16,663	18,060	34,723	3.68	0.11	21,479	22,385	43,864	4.19	0.14
60 to 64 years	16,702	19,254	35,956	3.82	0.11	17,262	19,196	36,458	3.48	0.11
65 to 69 years	16,449	19,827	36,276	3.85	0.11	15,064	18,006	33,070	3.16	0.10
70 to 74 years	12,711	15,597	28,308	3.00	0.09	14,602	17,173	31,775	3.03	0.10
75 +	17,483	28,990	46,473	4.93	0.14	24,131	37,434	61,565	5.88	0.19
	482,407	460,023	942,430	100	2.92	533,814	513,976	1,047,790	100	3.24
<b>CALIFORNIA</b>										
0 to 4 years	1,227,593	1,170,122	2,397,715	8.06	0.23	1,259,679	1,195,340	2,455,019	7.25	0.21
5 to 9 years	1,138,181	1,085,801	2,223,982	7.47	0.21	1,407,456	1,339,673	2,747,129	8.11	0.24
10 to 14 years	1,013,849	963,494	1,977,343	6.64	0.19	1,331,258	1,262,079	2,593,337	7.66	0.23
15 to 19 years	1,077,682	975,466	2,053,148	6.90	0.20	1,247,379	1,158,119	2,405,498	7.10	0.21
20 to 24 years	1,348,808	1,161,986	2,510,794	8.44	0.24	1,240,533	1,131,232	2,371,765	7.00	0.21
25 to 29 years	1,494,692	1,359,365	2,854,057	9.59	0.27	1,285,818	1,214,422	2,500,240	7.38	0.22
30 to 34 years	1,455,070	1,377,244	2,832,314	9.52	0.27	1,365,833	1,302,695	2,668,528	7.88	0.23
35 to 39 years	1,267,705	1,233,244	2,500,949	8.40	0.24	1,462,751	1,432,526	2,895,277	8.55	0.25
40 to 44 years	1,071,416	1,066,956	2,138,372	7.19	0.21	1,376,950	1,370,841	2,747,791	8.11	0.24
45 to 49 years	807,467	813,061	1,620,528	5.45	0.16	1,158,666	1,185,970	2,344,636	6.92	0.20
50 to 54 years	633,482	648,559	1,282,041	4.31	0.12	962,830	1,005,372	1,968,202	5.81	0.17
55 to 59 years	551,968	581,939	1,133,907	3.81	0.11	697,338	747,688	1,445,026	4.27	0.13
60 to 64 years	513,915	585,404	1,099,319	3.69	0.11	542,216	600,190	1,142,406	3.37	0.10
65 to 69 years	476,557	578,617	1,055,174	3.55	0.10	453,126	533,154	986,280	2.91	0.09
70 to 74 years	350,804	451,243	802,047	2.70	0.08	402,092	509,354	911,446	2.69	0.08
75 +	468,438	809,893	1,278,331	4.30	0.12	649,137	1,039,931	1,689,068	4.99	0.15
	14,897,627	14,862,394	29,760,021	100	2.87	16,843,062	17,028,586	33,871,648	100	2.94

### Appendix 16 – SLO County Age-Sex Pyramid

1990 & 2000

Source: US Census and ERA





## Appendix 17 –Income Distribution by Region

1990 & 2000

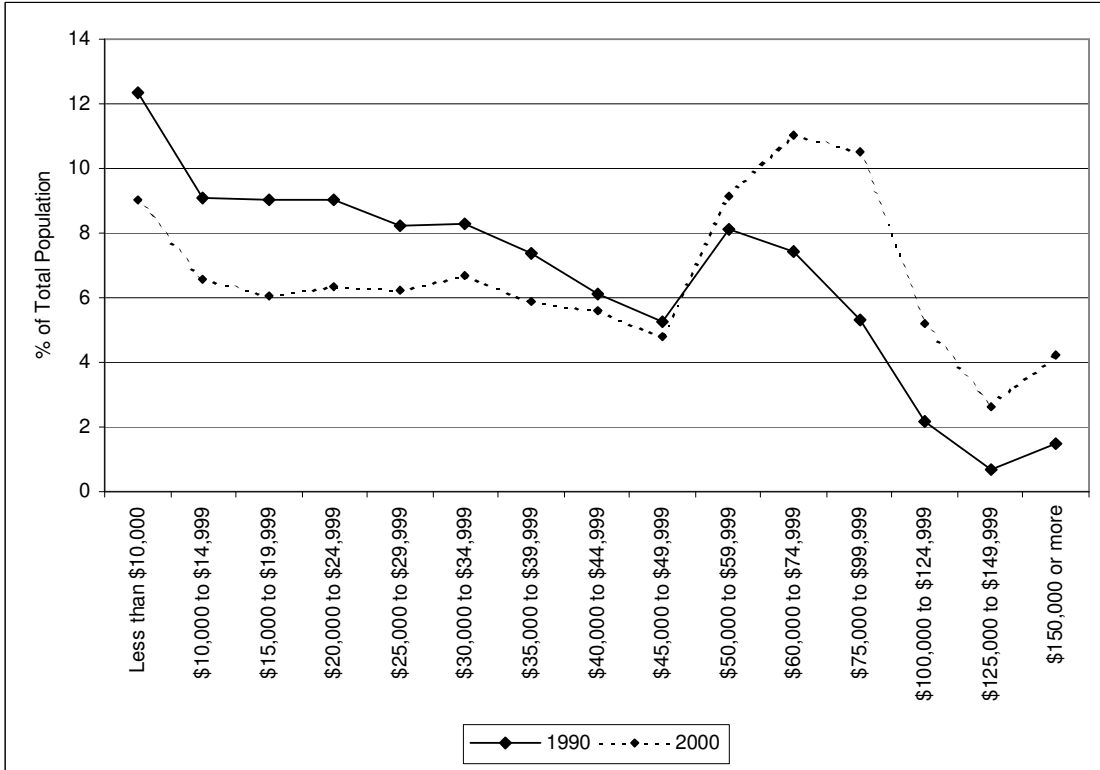
Source: US Census and ERA

	Number		Percent of Total		Change 1990 - 2000	
	1990	2000	1990	2000	Number	% of Pop
<b>SAN LUIS OBISPO</b>						
Less than \$10,000	9,909	8,382	12.36	9.04	-1,527	-3.32
\$10,000 to \$14,999	7,292	6,115	9.09	6.59	-1,177	-2.50
\$15,000 to \$19,999	7,222	5,636	9.01	6.08	-1,586	-2.93
\$20,000 to \$24,999	7,260	5,879	9.05	6.34	-1,381	-2.71
\$25,000 to \$29,999	6,587	5,796	8.21	6.25	-791	-1.96
\$30,000 to \$34,999	6,639	6,174	8.28	6.66	-465	-1.62
\$35,000 to \$39,999	5,906	5,457	7.36	5.88	-449	-1.48
\$40,000 to \$44,999	4,908	5,199	6.12	5.61	291	-0.51
\$45,000 to \$49,999	4,232	4,477	5.28	4.83	245	-0.45
\$50,000 to \$59,999	6,491	8,500	8.09	9.17	2,009	1.07
\$60,000 to \$74,999	5,970	10,218	7.44	11.02	4,248	3.57
\$75,000 to \$99,999	4,277	9,735	5.33	10.50	5,458	5.16
\$100,000 to \$124,999	1,735	4,817	2.16	5.19	3,082	3.03
\$125,000 to \$149,999	560	2,441	0.70	2.63	1,881	1.93
\$150,000 or more	1,207	3,906	1.51	4.21	2,699	2.71
<b>Total</b>	<b>80,195</b>	<b>92,732</b>	<b>100</b>	<b>100</b>	<b>12,537</b>	<b>0.00</b>
<b>CENTRAL COAST</b>						
Less than \$10,000	34,119	26,651	10.53	7.60	-7,468	-2.93
\$10,000 to \$14,999	25,667	19,809	7.92	5.65	-5,858	-2.28
\$15,000 to \$19,999	26,617	19,661	8.22	5.61	-6,956	-2.61
\$20,000 to \$24,999	28,453	20,949	8.78	5.97	-7,504	-2.81
\$25,000 to \$29,999	26,143	21,484	8.07	6.13	-4,659	-1.94
\$30,000 to \$34,999	26,954	22,053	8.32	6.29	-4,901	-2.03
\$35,000 to \$39,999	23,546	20,488	7.27	5.84	-3,058	-1.43
\$40,000 to \$44,999	20,733	19,458	6.40	5.55	-1,275	-0.85
\$45,000 to \$49,999	17,025	17,914	5.26	5.11	889	-0.15
\$50,000 to \$59,999	28,478	32,960	8.79	9.40	4,482	0.61
\$60,000 to \$74,999	27,095	37,659	8.36	10.74	10,564	2.37
\$75,000 to \$99,999	20,015	40,060	6.18	11.42	20,045	5.24
\$100,000 to \$124,999	8,130	21,217	2.51	6.05	13,087	3.54
\$125,000 to \$149,999	3,592	10,860	1.11	3.10	7,268	1.99
\$150,000 or more	7,346	19,477	2.27	5.55	12,131	3.29
<b>Total</b>	<b>323,913</b>	<b>350,700</b>	<b>100.00</b>	<b>100.00</b>		
<b>CALIFORNIA</b>						
Less than \$10,000	1,197,503	967,089	11.51	8.40	-230,414	-3.11
\$10,000 to \$14,999	771,755	648,780	7.42	5.64	-122,975	-1.79
\$15,000 to \$19,999	774,321	645,181	7.45	5.60	-129,140	-1.84
\$20,000 to \$24,999	802,199	673,065	7.71	5.85	-129,134	-1.87
\$25,000 to \$29,999	762,170	653,245	7.33	5.67	-108,925	-1.65
\$30,000 to \$34,999	768,063	661,840	7.39	5.75	-106,223	-1.64
\$35,000 to \$39,999	681,912	619,875	6.56	5.38	-62,037	-1.17
\$40,000 to \$44,999	652,773	595,943	6.28	5.18	-56,830	-1.10
\$45,000 to \$49,999	553,462	530,143	5.32	4.61	-23,319	-0.72
\$50,000 to \$59,999	943,146	984,798	9.07	8.55	41,652	-0.51
\$60,000 to \$74,999	965,926	1,218,075	9.29	10.58	252,149	1.29
\$75,000 to \$99,999	792,419	1,326,569	7.62	11.52	534,150	3.90
\$100,000 to \$124,999	335,271	780,489	3.22	6.78	445,218	3.56
\$125,000 to \$149,999	140,613	412,129	1.35	3.58	271,516	2.23
\$150,000 or more	258,167	794,799	2.48	6.90	536,632	4.42
<b>Total</b>	<b>10,399,700</b>	<b>11,512,020</b>	<b>100.00</b>	<b>100.00</b>		

### Appendix 18 – SLO Income Distribution Comparison by Census

1990 & 2000

Source: US Census and ERA





## Appendix 19 – Education Levels by Region

1990 & 2000 – Age 18 and above

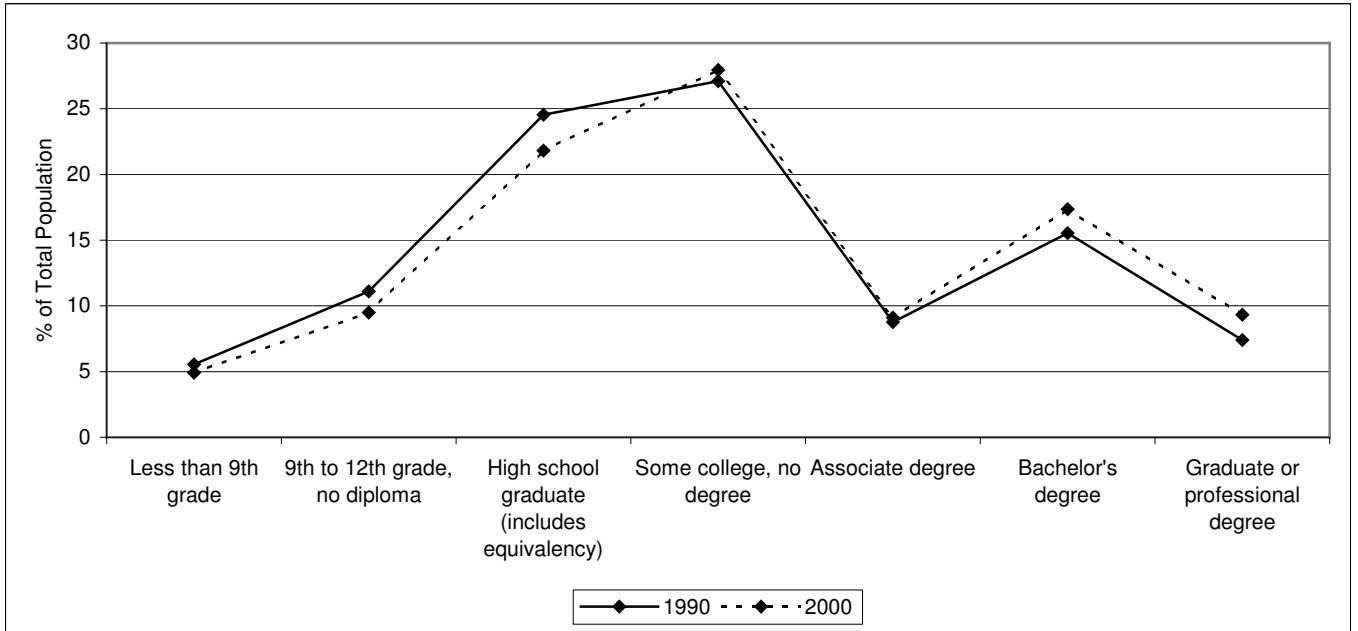
Source: US Census and ERA

	Number		% of Population		Change 1990 - 2000	
	1990	2000	1990	2000	Number	% of Pop
<b>SAN LUIS OBISPO</b>						
Less than 9th grade	7,732	7,836	5.56	4.92	104	-0.64
9th to 12th grade, no diploma	15,424	15,128	11.10	9.50	-296	-1.59
High school graduate (includes equivalency)	34,099	34,728	24.53	21.81	629	-2.72
Some college, no degree	37,664	44,514	27.10	27.96	6,850	0.86
Associate degree	12,184	14,483	8.77	9.10	2,299	0.33
Bachelor's degree	21,586	27,648	15.53	17.37	6,062	1.84
Graduate or professional degree	10,297	14,859	7.41	9.33	4,562	1.93
Total	138,986	159,196	100.00	100.00		
<b>CENTRAL COAST</b>						
Less than 9th grade	62,813	80,772	10.79	12.43	17,959	1.64
9th to 12th grade, no diploma	64,019	70,473	10.99	10.84	6,454	-0.15
High school graduate (includes equivalency)	127,836	127,023	21.95	19.54	-813	-2.41
Some college, no degree	141,421	152,490	24.29	23.46	11,069	-0.83
Associate degree	47,069	49,253	8.08	7.58	2,184	-0.51
Bachelor's degree	89,586	105,742	15.38	16.27	16,156	0.88
Graduate or professional degree	49,593	64,300	8.52	9.89	14,707	1.38
Total	582,337	650,053	100.00	100.00		
<b>CALIFORNIA</b>						
Less than 9th grade	2,085,905	2,446,324	11.16	11.49	360,419	0.33
9th to 12th grade, no diploma	2,364,623	2,496,419	12.65	11.72	131,796	-0.93
High school graduate (includes equivalency)	4,167,897	4,288,452	22.29	20.13	120,555	-2.16
Some college, no degree	4,225,911	4,879,336	22.60	22.91	653,425	0.30
Associate degree	1,484,489	1,518,403	7.94	7.13	33,914	-0.81
Bachelor's degree	2,858,107	3,640,157	15.29	17.09	782,050	1.80
Graduate or professional degree	1,508,567	2,029,809	8.07	9.53	521,242	1.46
Total	18,695,499	21,298,900	100.00	100.00		

**Appendix 20 – Education Levels in SLO County**

1990 & 2000 – Age 18 and above

Source: US Census and ERA





**Appendix 21 – SLO County Households**  
1990 – 2005

**SLO County**

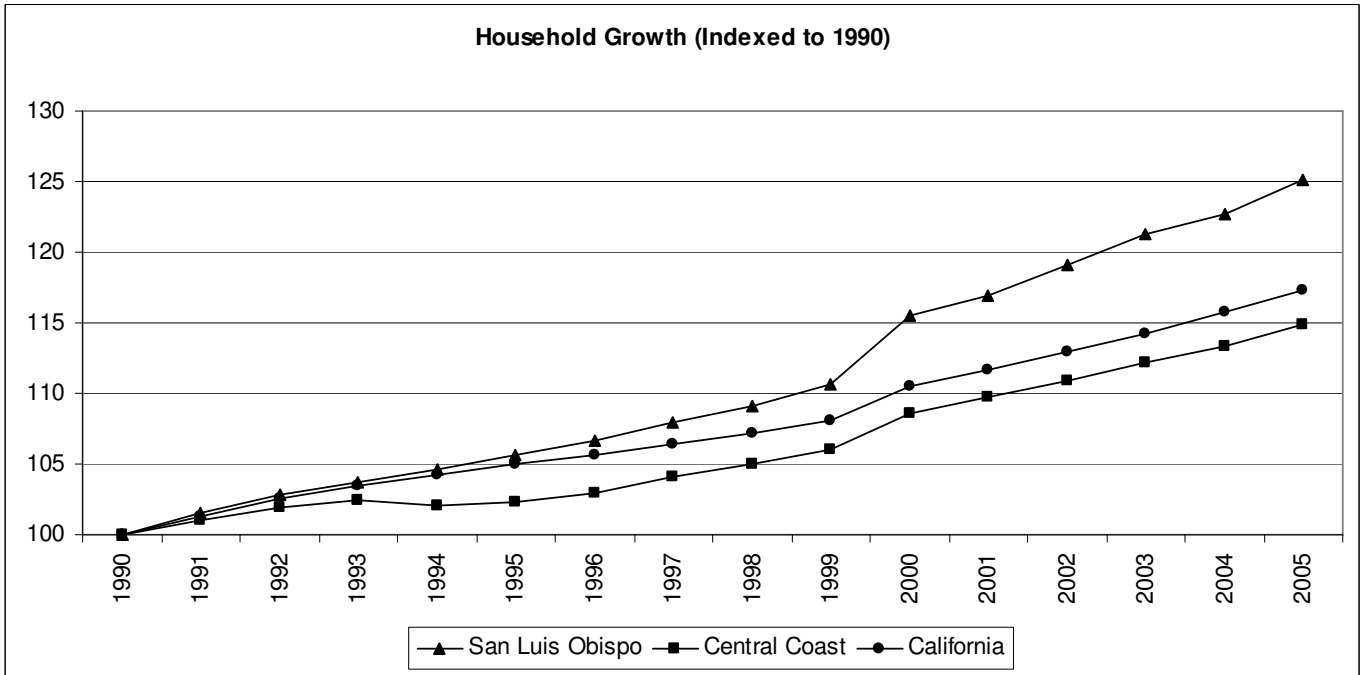
	HHs	Percent Change	Numeric Change	Persons/ HHs	Percent Change	Numeric Change	Percent CC	Percent CA	HH Index	P/HH Index
2005	100,487	2.00	1,967	2.437	-0.81	-0.020	0.271	0.0082	125.18	96.21
2004	98,520	1.23	1,197	2.457	-0.45	-0.011	0.269	0.0082	122.73	97.00
2003	97,323	1.82	1,739	2.468	-0.80	-0.020	0.269	0.0082	121.24	97.43
2002	95,584	1.80	1,686	2.488	-0.28	-0.007	0.267	0.0082	119.07	98.22
2001	93,898	1.25	1,157	2.495	0.12	0.003	0.265	0.0081	116.97	98.50
2000	92,741	4.44	3,944	2.492	-1.27	-0.032	0.265	0.0081	115.53	98.38
1999	88,796	1.40	1,225	2.524	-0.08	-0.002	0.259	0.0079	110.61	99.64
1998	87,571	1.09	947	2.526	0.52	0.013	0.258	0.0079	109.09	99.72
1997	86,624	1.18	1,010	2.513	0.24	0.006	0.258	0.0078	107.91	99.21
1996	85,614	0.99	837	2.507	-0.08	-0.002	0.257	0.0078	106.65	98.97
1995	84,777	1.00	842	2.509	-0.12	-0.003	0.257	0.0078	105.61	99.05
1994	83,935	0.80	666	2.512	0.16	0.004	0.255	0.0078	104.56	99.17
1993	83,270	0.82	678	2.508	0.40	0.010	0.252	0.0078	103.73	99.01
1992	82,591	1.29	1,051	2.498	-0.36	-0.009	0.251	0.0078	102.88	98.62
1991	81,540	1.57	1,264	2.507	-1.03	-0.026	0.250	0.0078	101.57	98.97
1990	80,276	-	-	2.533	-	-	0.249	0.0077	100.00	100.00

Source: DOF and ERA

### Appendix 22 – Household Growth by Region

Indexed to 1990 = 100

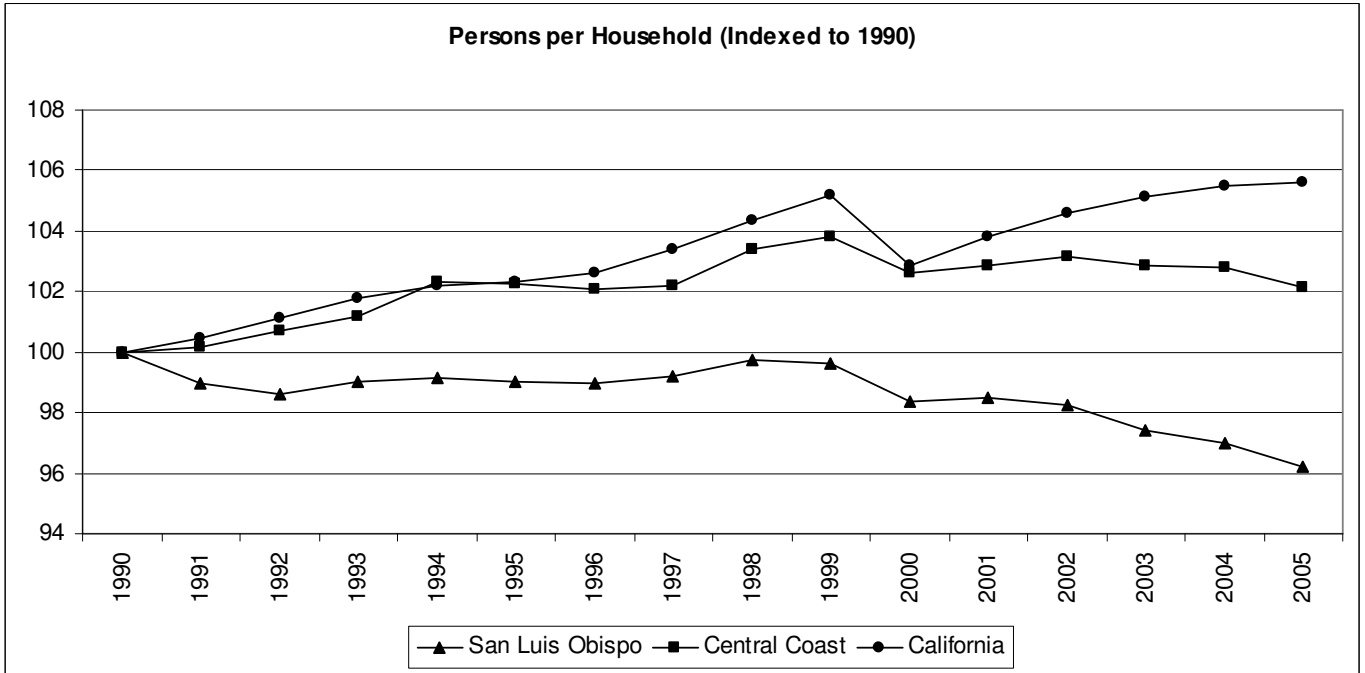
Source: DOF and ERA



### Appendix 23 – Persons Per Household by Region

Indexed to 1990 = 100

Source: DOF and ERA





## Appendix 24 – Housing Units by Region

1990 – 2005

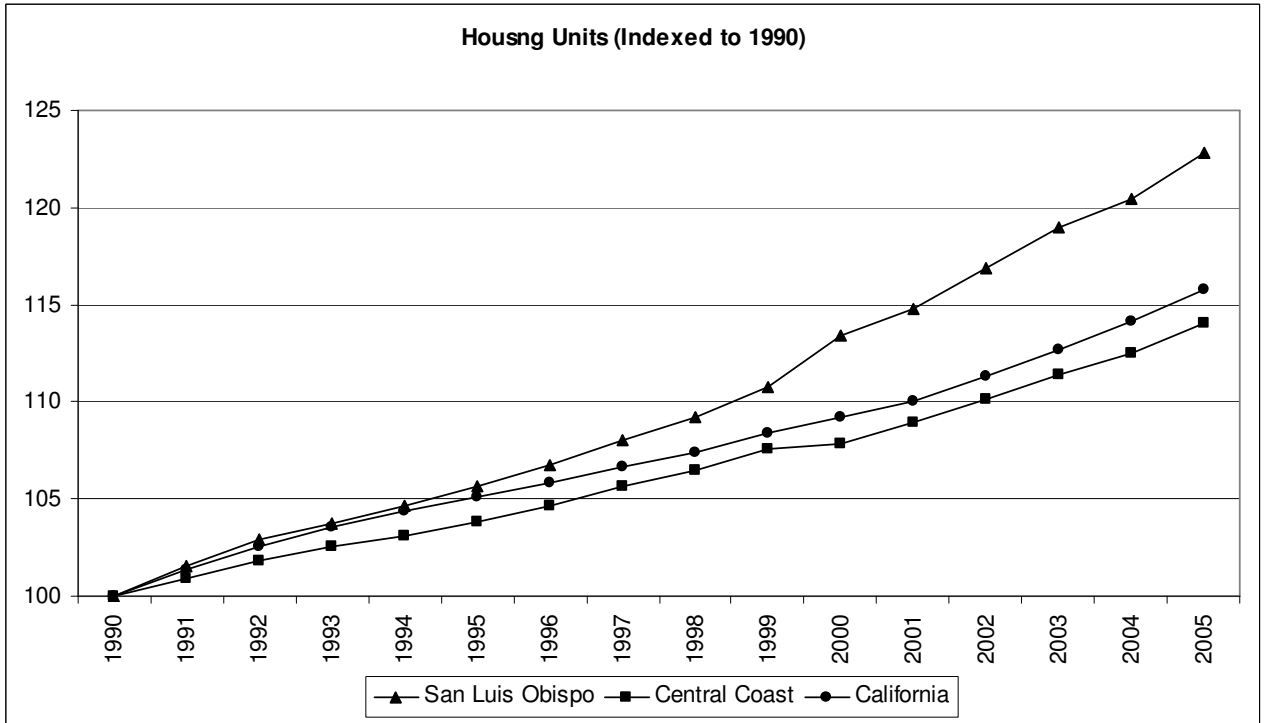
Source: DOF and ERA

San Luis Obispo							Central Coast					California						
	Percent	Numeric		Percent	Percent	Index		Percent	Numeric		Percent	Index		Percent	Numeric		Index	
	HUs	Change	Change	Vacancy	CC	CA	SLO	HUs	Change	Change	Vacancy	State	CC	HUs	Change	Change	Vacancy	CA
2005	110,793	2.01	2,185	9.30	27.80	0.86	122.83	398,555	1.33	5,231	7.09	3.08	114.01	12,945,237	1.45	184,911	5.87	115.76
2004	108,608	1.22	1,309	9.31	27.61	0.85	120.41	393,324	1.03	4,007	7.19	3.08	112.52	12,760,326	1.27	160,182	5.84	114.11
2003	107,299	1.77	1,864	9.31	27.56	0.85	118.96	389,317	1.14	4,395	7.16	3.09	111.37	12,600,144	1.20	149,956	5.83	112.68
2002	105,435	1.82	1,887	9.33	27.39	0.85	116.89	384,922	1.07	4,091	7.19	3.09	110.11	12,450,188	1.15	142,150	5.82	111.34
2001	103,548	1.24	1,273	9.32	27.19	0.84	114.80	380,831	1.05	3,947	7.20	3.09	108.94	12,308,038	0.77	93,488	5.81	110.07
2000	102,275	2.37	2,370	9.32	27.14	0.84	113.39	376,884	0.24	920	7.22	3.09	107.81	12,214,550	0.81	97,725	5.83	109.23
1999	99,905	1.41	1,393	11.11	26.57	0.82	110.76	375,964	0.98	3,663	9.19	3.10	107.55	12,116,825	0.86	103,788	7.40	108.36
1998	98,512	1.11	1,080	11.10	26.46	0.82	109.22	372,301	0.83	3,049	9.18	3.10	106.50	12,013,037	0.76	90,393	7.41	107.43
1997	97,432	1.21	1,165	11.09	26.39	0.82	108.02	369,252	0.91	3,332	9.22	3.10	105.63	11,922,644	0.70	83,433	7.39	106.62
1996	96,267	1.01	959	11.08	26.31	0.81	106.73	365,920	0.78	2,848	9.36	3.09	104.68	11,839,211	0.69	80,690	7.36	105.87
1995	95,308	1.01	949	11.07	26.25	0.81	105.66	363,072	0.73	2,625	9.27	3.09	103.86	11,758,521	0.77	90,254	7.34	105.15
1994	94,359	0.82	772	11.05	26.18	0.81	104.61	360,447	0.55	1,988	8.88	3.09	103.11	11,668,267	0.79	91,132	7.31	104.34
1993	93,587	0.82	763	11.04	26.11	0.81	103.75	358,459	0.66	2,355	8.03	3.10	102.54	11,577,135	0.95	109,226	7.25	103.53
1992	92,824	1.31	1,198	11.02	26.07	0.81	102.91	356,104	0.96	3,373	7.94	3.11	101.87	11,467,909	1.15	130,877	7.20	102.55
1991	91,626	1.58	1,426	11.00	25.98	0.81	101.58	352,731	0.90	3,158	7.90	3.11	100.90	11,337,032	1.38	154,519	7.18	101.38
1990	90,200	-	-	11.00	25.80	0.81	100.00	349,573	-	-	7.95	3.13	100.00	11,182,513	-	-	7.17	100.00

**Appendix 25 – Housing Unit Growth by Region**

Indexed to 1990 = 100

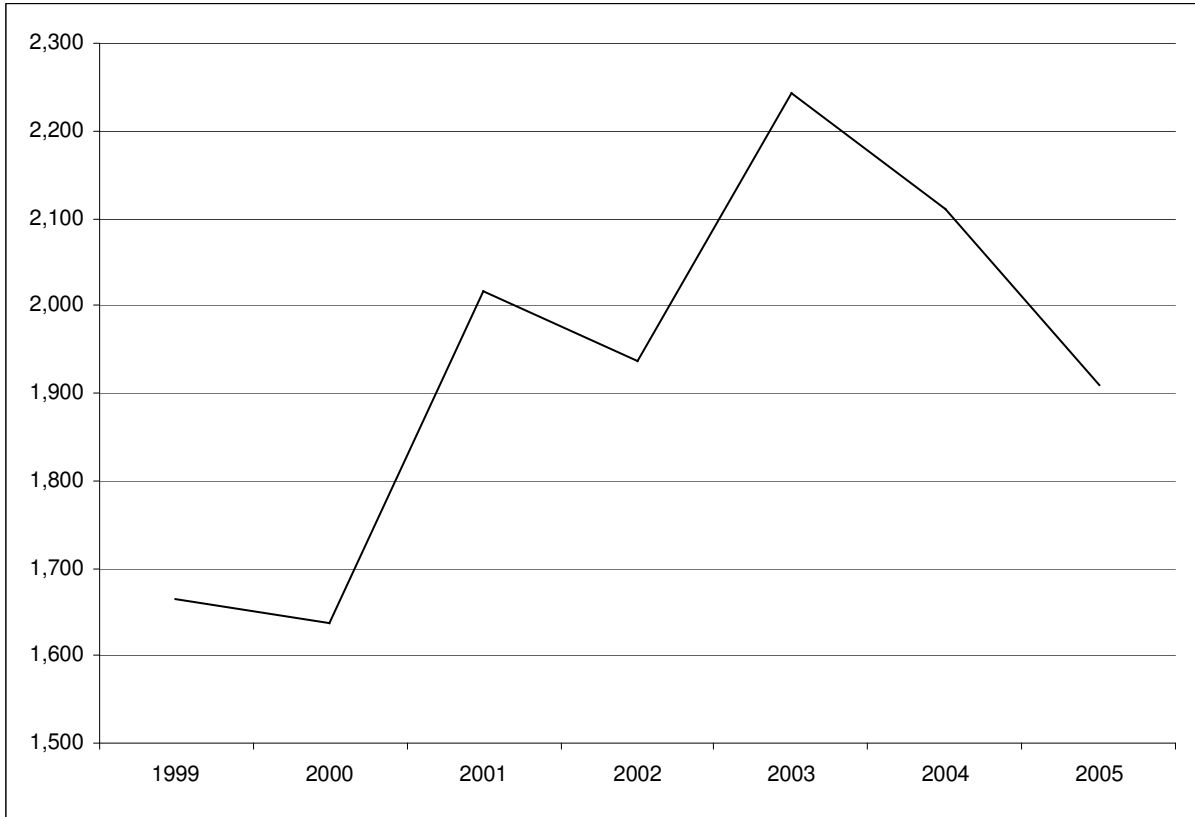
Source: DOF and ERA



### Appendix 26 – SLO County Residential Building Activity

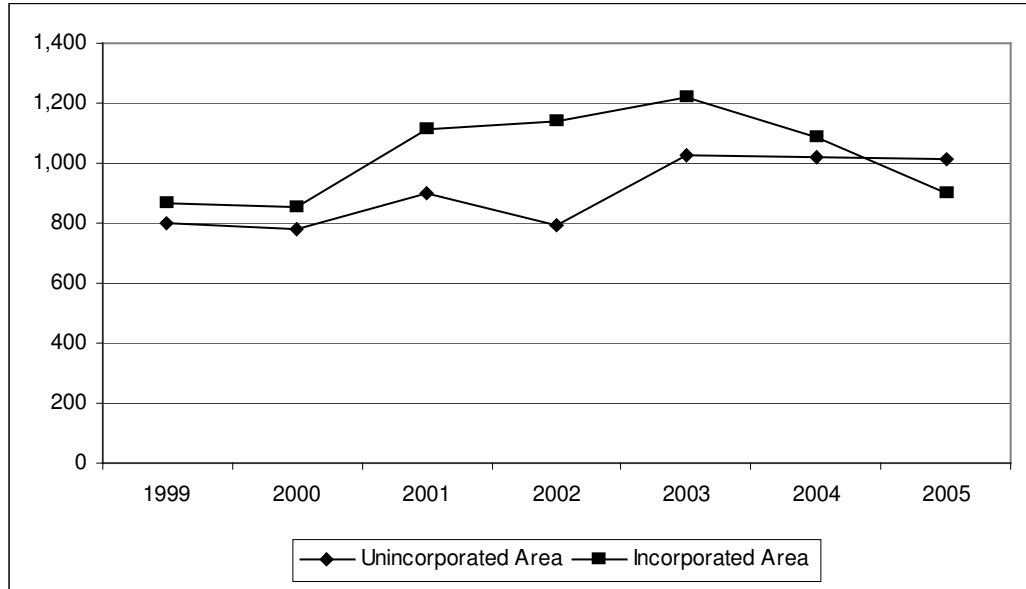
1999 – 2005

Source: Construction Industry Research Board and ERA



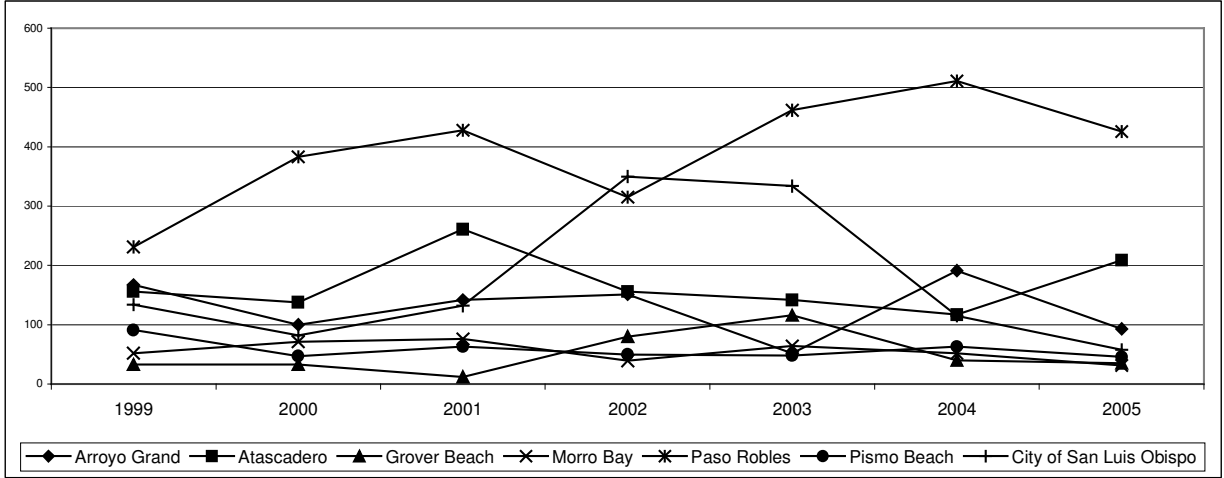
### Appendix 27 – Residential Building Activity (Unincorporated vs. Incorporated)

Source: Construction Industry Research Board and ERA



### Appendix 28 – Residential Building Activity by City

Source: Construction Industry Research Board and ERA





## Appendix 29 – Residential Building Activity (Single Family vs. Multifamily) Data

Source: Construction Industry Research Board and ERA

City/County	1999			2000			2001			2002			2003			2004			2005		
	SF	MF	Total	SF	MF	Total	SF	MF	Total	SF	MF	Total	SF	MF	Total	SF	MF	Total	SF	MF	Total
Arroyo Grand	153	14	167	100	0	100	142	0	142	151	0	151	52	0	52	79	112	191	93	0	93
Atascadero	132	24	156	127	11	138	151	110	261	156	0	156	136	6	142	103	14	117	164	45	209
Grover Beach	33	0	33	30	3	33	10	2	12	70	10	80	90	26	116	35	5	40	33	2	35
Morro Bay	52	0	52	64	7	71	67	9	76	28	11	39	58	6	64	35	17	52	23	8	31
Paso Robles	231	0	231	371	12	383	419	9	428	305	10	315	416	46	462	431	80	511	332	94	426
Pismo Beach	89	2	91	41	6	47	49	14	63	40	10	50	46	2	48	60	3	63	32	14	46
City of San Luis Obispo	100	34	134	49	33	82	109	23	132	180	170	350	191	143	334	59	56	115	45	13	58
Unincorporated Area	788	12	800	752	31	783	738	165	903	774	22	796	983	42	1,025	935	86	1,021	915	97	1,012
San Luis Obispo County	1,578	86	1,664	1,534	103	1,637	1,685	332	2,017	1,704	233	1,937	1,972	271	2,243	1,737	373	2,110	1,637	273	1,910



## Appendix 30 – Housing Prices by Region

1990 – 2005

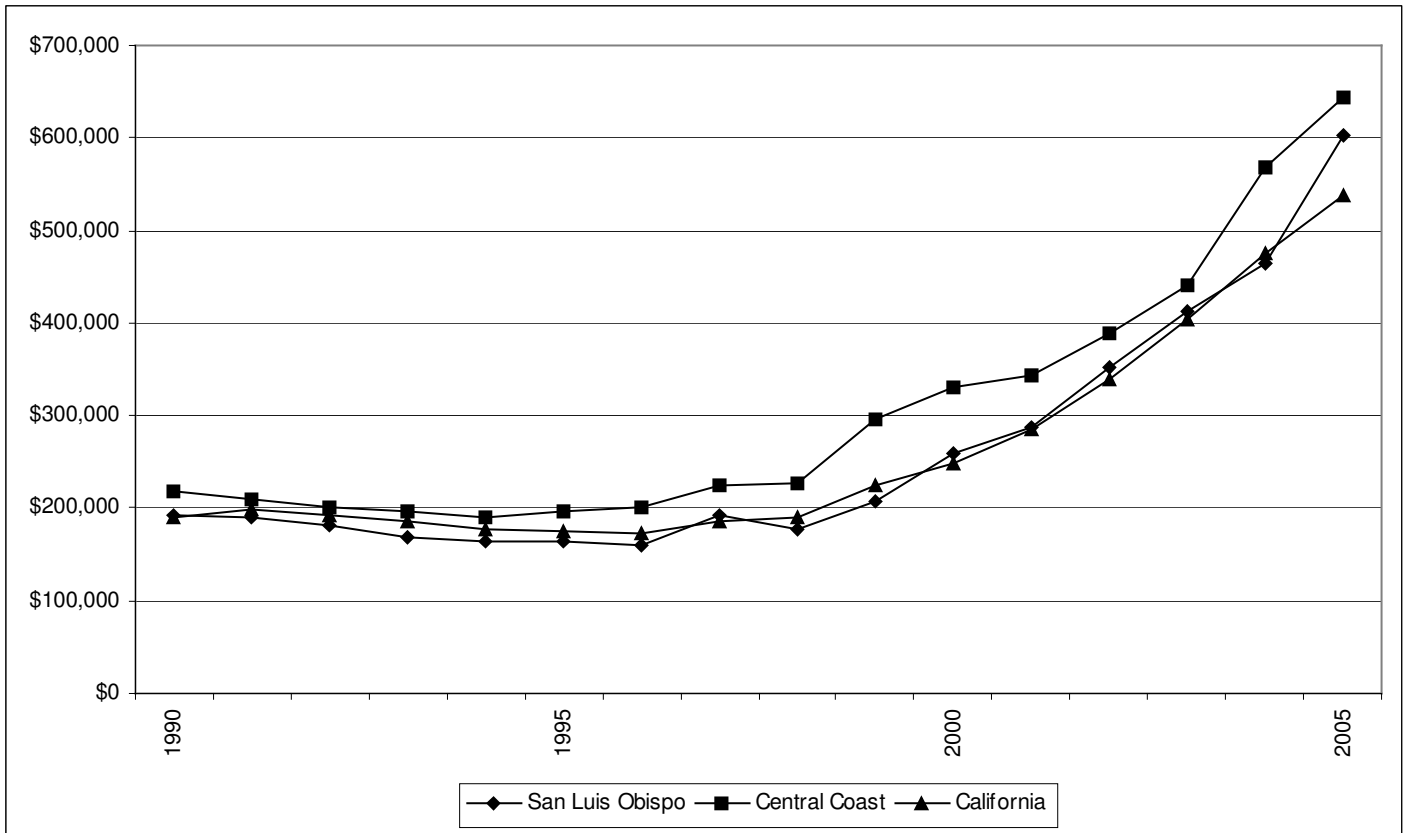
Source: California Association of Realtors and ERA

December	San Luis Obispo		Central Coast		California	
	Median Price	Index	Median Price	Index	Median Price	Index
1990	\$192,860	100.00	\$217,203	100.00	\$190,380	100.00
1991	\$190,000	98.52	\$210,590	96.96	\$199,450	104.76
1992	\$181,670	94.20	\$201,860	92.94	\$193,330	101.55
1993	\$169,550	87.91	\$197,053	90.72	\$184,980	97.16
1994	\$164,620	85.36	\$191,170	88.01	\$177,420	93.19
1995	\$163,750	84.91	\$196,510	90.47	\$175,370	92.12
1996	\$159,370	82.64	\$201,693	92.86	\$171,940	90.31
1997	\$191,430	99.26	\$225,703	103.91	\$186,550	97.99
1998	\$177,370	91.97	\$227,457	104.72	\$190,120	99.86
1999	\$207,758	107.72	\$296,953	136.72	\$225,260	118.32
2000	\$258,695	134.14	\$331,008	152.40	\$248,350	130.45
2001	\$286,538	148.57	\$343,345	158.08	\$285,110	149.76
2002	\$352,325	182.68	\$388,372	178.81	\$338,840	177.98
2003	\$413,636	214.47	\$441,252	203.15	\$404,520	212.48
2004	\$465,555	241.40	\$569,071	262.00	\$474,280	249.12
2005	\$603,125	312.73	\$643,335	296.19	\$538,770	283.00

**Appendix 31 – Median Home Value Comparison by Region**

1990 – 2005

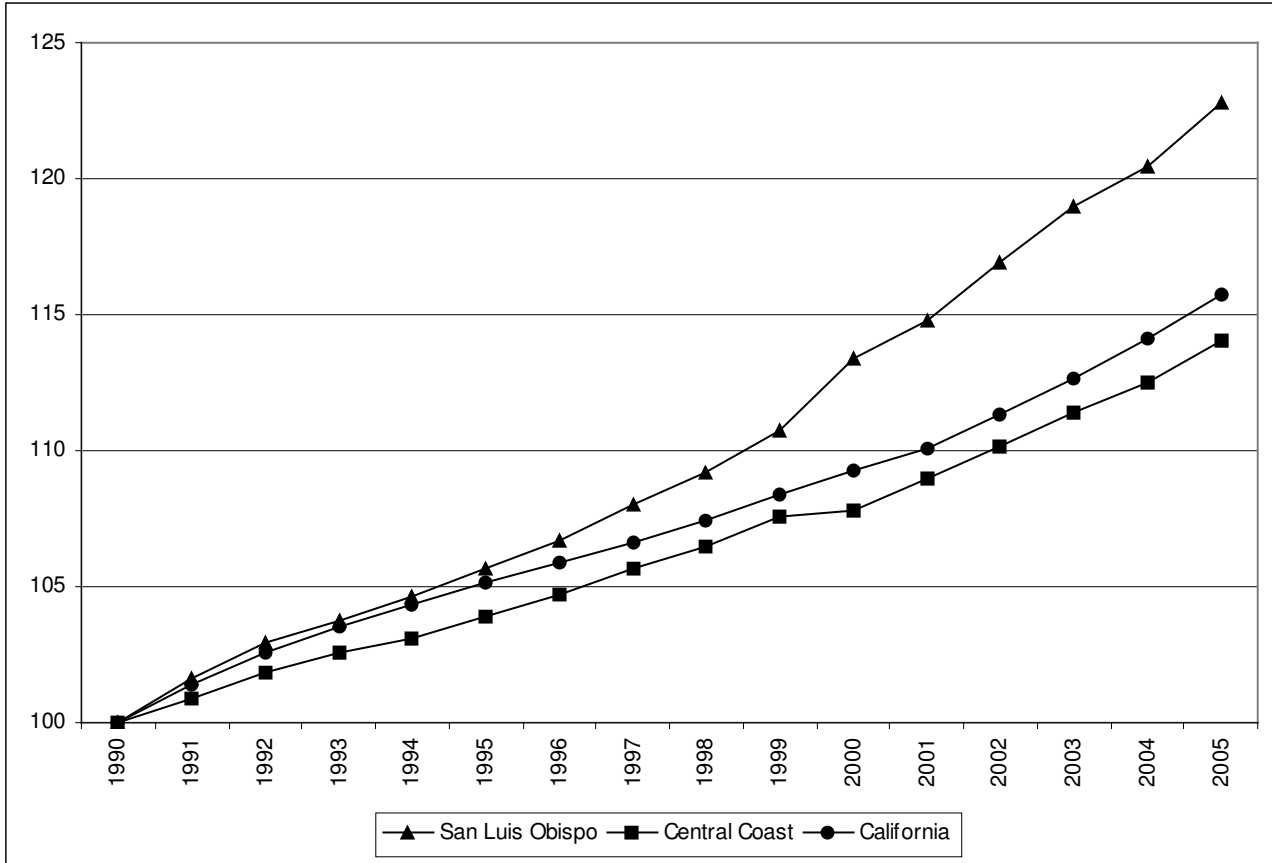
Source: California Association of Realtors and ERA



**Appendix 32 – Housing Prices Comparison by Region**

Indexed to 1990 = 100

Source: California Association of Realtors and ERA





## Appendix 33 – City Level Real Estate

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
<b>Arroyo Grande</b>											
Median Home Price (\$ thousands)	160.7	150.7	159.0	166.6	195.6	198.6	293.5	296.9	356.6	445.9	522.0
Median Home Price (\$ 2000 thousands)	180.9	167.1	173.4	178.7	206.8	205.2	293.5	287.2	335.7	409.2	465.8
percent change	-10.3	-7.7	3.8	3.1	15.7	-0.8	43.1	-2.1	16.9	21.9	13.8
Number of Home Sales	390	324	423	451	494	452	403	357	423	361	391
<b>Atascadero</b>											
Median Home Price (\$ thousands)	138.6	133.6	144.5	144.7	148.0	160.7	196.1	244.9	291.1	336.5	399.2
Median Home Price (\$ 2000 thousands)	156.1	148.2	157.5	155.1	156.5	166.0	196.1	236.9	274.0	308.8	356.3
percent change	-5.5	-5.0	6.3	-1.5	0.9	6.1	18.1	20.8	15.7	12.7	15.4
Number of Home Sales	558	441	432	479	610	608	493	434	401	387	418
<b>Grover Beach</b>											
Median Home Price (\$ thousands)	133.6	122.6	124.2	140.7	143.3	158.1	178.6	229.9	277.0	358.4	428.8
Median Home Price (\$ 2000 thousands)	150.5	136.0	135.4	150.9	151.5	163.3	178.6	222.4	260.7	328.8	382.7
percent change	3.3	-9.7	-0.4	11.4	0.4	7.8	9.4	24.5	17.2	26.1	16.4
Number of Home Sales	195	154	187	171	214	225	195	180	192	164	206
<b>Morro Bay</b>											
Median Home Price (\$ thousands)	145.9	150.5	146.7	162.7	172.5	194.6	242.8	307.0	361.4	416.2	508.8
Median Home Price (\$ 2000 thousands)	164.3	166.9	160.0	174.4	182.3	201.0	242.8	297.0	340.2	381.9	454.1
percent change	-10.4	1.5	-4.1	9.1	4.5	10.3	20.8	22.4	14.5	12.2	18.9
Number of Home Sales	144	133	167	201	229	202	181	182	185	206	218
<b>Nipomo</b>											
Median Home Price (\$ thousands)	156.6	154.0	154.4	177.3	160.4	188.0	221.7	286.7	322.6	400.5	461.0
Median Home Price (\$ 2000 thousands)	176.3	170.7	168.4	190.1	169.6	194.2	221.7	277.4	303.7	367.5	411.4
percent change	-55.3	-3.2	-1.4	12.9	-10.8	14.5	14.2	25.1	9.5	21.0	12.0
Number of Home Sales	267	210	224	231	316	252	138	173	211	227	264
<b>Paso Robles</b>											
Median Home Price (\$ thousands)	124.0	122.7	130.9	131.4	142.0	151.1	176.9	214.3	251.1	306.4	354.3
Median Home Price (\$ 2000 thousands)	139.6	136.1	142.7	140.9	150.1	156.1	176.9	207.3	236.4	281.2	316.2
percent change	-4.1	-2.5	4.9	-1.3	6.5	4.0	13.3	17.2	14.0	19.0	12.4
Number of Home Sales	664	656	650	740	746	675	580	522	606	568	679
<b>Pismo Beach</b>											
Median Home Price (\$ thousands)	199.7	213.8	281.9	220.4	220.7	241.3	318.1	404.5	440.5	514.9	611.4
Median Home Price (\$ 2000 thousands)	224.9	237.1	307.4	236.4	233.3	249.2	318.1	391.3	414.7	472.5	545.7
percent change	0.4	5.4	29.6	-23.1	-1.3	6.8	27.6	23.0	6.0	13.9	15.5
Number of Home Sales	137	177	206	181	167	216	185	151	162	175	172
<b>City of San Luis Obispo</b>											
Median Home Price (\$ thousands)	173.4	176.7	176.9	197.1	197.8	221.3	267.8	331.6	397.0	442.9	500.5
Median Home Price (\$ 2000 thousands)	195.3	195.9	192.9	211.4	209.2	228.6	267.8	320.8	373.7	406.4	446.6
percent change	-10.4	0.3	-1.5	9.6	-1.1	9.3	17.2	19.8	16.5	8.8	9.9
Number of Home Sales	613	502	498	577	677	676	595	535	552	501	545

Source: First American Real Estate Solutions



## Appendix 34 – Non-Farm Employment by Region

Source: EDD and ERA

	San Luis Obispo						Central Coast					California			
	Employment (July 1)	Percent Change	Numeric Change	Index 1990	% of CC	% of CA	Employment (July 1)	Percent Change	Numeric Change	Index 1990	% of CA	Employment (July 1)	Percent Change	Numeric Change	Index 1990
2005	100,700	1.63	1,600	133.91	25.19	0.68	399,800	1.24	4,900	119.84	2.70	14,785,200	1.75	254,800	118.28
2004	99,100	1.02	1,000	131.78	25.09	0.68	394,900	0.77	3,000	118.38	2.72	14,530,400	0.96	138,100	116.25
2003	98,100	-0.30	-300	130.45	25.03	0.68	391,900	-0.38	-1,500	117.48	2.72	14,392,300	-0.45	-65,500	115.14
2002	98,400	1.12	1,100	130.85	25.01	0.68	393,400	-0.03	-100	117.93	2.72	14,457,800	-0.99	-144,200	115.66
2001	97,300	3.15	3,100	129.39	24.73	0.67	393,500	1.89	7,300	117.96	2.69	14,602,000	0.79	113,800	116.82
2000	94,200	3.76	3,700	125.27	24.39	0.65	386,200	3.40	12,700	115.77	2.67	14,488,200	3.55	496,400	115.91
1999	90,500	4.47	4,400	120.35	24.23	0.65	373,500	3.58	12,900	111.96	2.67	13,991,800	2.91	395,700	111.94
1998	86,100	4.07	4,000	114.49	23.88	0.63	360,600	3.09	10,800	108.09	2.65	13,596,100	3.55	466,400	108.77
1997	82,100	3.35	3,300	109.18	23.47	0.63	349,800	3.95	13,300	104.86	2.66	13,129,700	3.03	386,300	105.04
1996	78,800	2.03	2,000	104.79	23.42	0.62	336,500	2.12	7,000	100.87	2.64	12,743,400	2.59	321,400	101.95
1995	76,800	2.54	2,500	102.13	23.31	0.62	329,500	1.26	4,100	98.77	2.65	12,422,000	2.16	262,500	99.38
1994	74,300	2.95	2,900	98.80	22.83	0.61	325,400	0.84	2,700	97.54	2.68	12,159,500	0.95	114,100	97.28
1993	71,400	-1.83	-1,800	94.95	22.13	0.59	322,700	-1.13	-3,700	96.73	2.68	12,045,400	-0.89	-108,100	96.36
1992	73,200	0.30	300	97.34	22.43	0.60	326,400	-1.36	-4,500	97.84	2.69	12,153,500	-1.66	-205,400	97.23
1991	72,900	-2.34	-2,300	96.94	22.03	0.59	330,900	-0.81	-2,700	99.19	2.68	12,358,900	-1.13	-140,900	98.87
1990	75,200	-	-	100.00	22.54	0.60	333,600	-	-	100.00	2.67	12,499,800	-	-	100.00



## Appendix 35 – Shift Share Analysis

Source: EDD and ERA

Industry	SLO				California				Absolute Change		
	Employment 1990	Employment 2005	Employment Growth 1990-2005	Employment Growth Rate 1990-2005	Employment 1990	Employment 2005	Employment Growth 1990-2005	Employment Growth Rate 1990-2005	Share Effect	Industry Mix	Industry Competitive Effect
Natural Resources, Mining and Construction	5,500	7,700	2,200	0.40	680,800	925,100	244,300	0.36	1,006	968	226
Manufacturing	5,400	6,200	800	0.15	1,959,800	1,512,700	-447,100	-0.23	987	-2,219	2,032
Wholesale Trade	1,400	2,600	1,200	0.86	550,400	673,100	122,700	0.22	256	56	888
Retail Trade	11,100	13,800	2,700	0.24	1,444,000	1,654,200	210,200	0.15	2,029	-414	1,084
Transportation, Warehousing and Utilities	3,000	3,700	700	0.23	425,200	487,100	61,900	0.15	548	-112	263
Information	1,500	1,600	100	0.07	390,600	475,000	84,400	0.22	274	50	-224
Financial Activities	3,600	4,800	1,200	0.33	821,900	926,800	104,900	0.13	658	-199	741
Professional and Business Services	5,600	8,800	3,200	0.57	1,516,000	2,147,700	631,700	0.42	1,024	1,310	867
Educational and Health Services	6,300	10,800	4,500	0.71	1,116,300	1,584,500	468,200	0.42	1,152	1,491	1,858
Leisure and Hospitality	10,600	14,700	4,100	0.39	1,104,500	1,474,400	369,900	0.33	1,938	1,612	550
Other Services	4,400	4,300	-100	-0.02	415,600	510,700	95,100	0.23	804	202	-1,107
Federal Government	700	600	-100	-0.14	362,100	249,100	-113,000	-0.31	128	-346	118
State and Local Government	16,200	21,200	5,000	0.31	1,712,700	2,164,800	452,100	0.26	2,962	1,315	724
<b>Total</b>	<b>75,300</b>	<b>100,800</b>	<b>25,500</b>	<b>0.34</b>	<b>12,499,900</b>	<b>14,785,200</b>	<b>2,285,300</b>	<b>0.18</b>	<b>13,767</b>	<b>3,714</b>	<b>8,020</b>



## Appendix 36 – Non Farm Employment by Sector (SLO County)

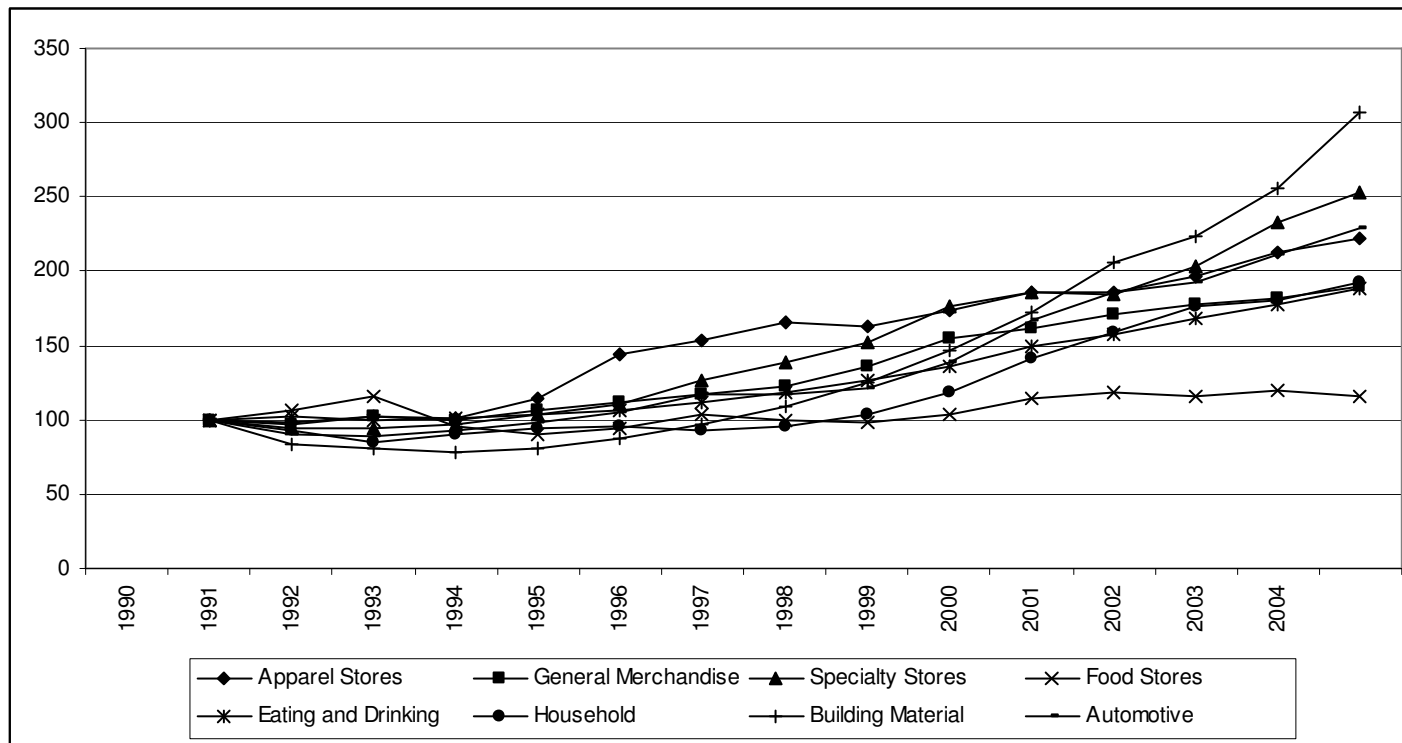
Source: EDD and ERA

TITLE	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Total, All Industries	77,800	75,600	75,800	74,400	77,500	79,900	82,700	87,000	90,800	94,800	99,000	102,200	103,000	102,000	103,100	104,800
Total Farm	2,700	2,700	2,600	3,100	3,300	3,000	3,900	4,800	4,600	4,300	4,800	4,900	4,600	3,900	4,000	4,200
Total Nonfarm	75,200	72,900	73,200	71,400	74,300	76,800	78,800	82,100	86,100	90,500	94,200	97,300	98,400	98,100	99,100	100,700
Total Private	57,900	58,500	57,600	55,100	57,000	58,600	59,700	62,800	67,000	70,500	71,200	74,600	75,400	75,700	77,200	78,800
Goods Producing	10,800	10,000	9,200	8,500	8,800	9,800	10,400	11,200	12,000	13,800	13,500	14,000	13,700	13,400	13,600	13,900
Natural Resources, Mining and Construction	5,500	4,300	3,800	3,300	3,500	4,100	4,200	4,400	5,000	6,500	6,100	6,700	6,800	6,900	7,200	7,700
Manufacturing	5,400	5,700	5,400	5,200	5,300	5,800	6,200	6,800	7,100	7,300	7,400	7,400	6,900	6,500	6,400	6,200
Durable Goods	3,200	3,600	3,400	3,200	3,100	3,300	3,500	3,900	4,200	4,100	4,200	4,200	4,000	3,700	3,500	3,100
Machinery Manufacturing	200	400	400	400	500	700	800	900	900	900	700	900	800	700	800	800
Computer and Electronic Product Manufacturing	1,300	1,300	1,000	800	600	600	500	600	700	600	700	700	700	600	500	200
Residual-Miscellaneous Manufacturing	1,700	1,900	2,000	2,000	2,000	2,100	2,200	2,400	2,600	2,600	2,800	2,700	2,500	2,400	2,300	2,200
Nondurable Goods	2,200	2,100	2,000	2,000	2,200	2,400	2,700	2,900	2,900	3,100	3,200	3,100	3,000	2,800	2,900	3,000
Food Man & Beverage & Tobacco	700	600	500	500	600	700	700	800	800	900	1,000	1,100	1,200	1,200	1,300	1,400
Residual-Textile Mills	1,500	1,500	1,600	1,500	1,600	1,700	2,000	2,100	2,100	2,200	2,200	2,100	1,800	1,600	1,600	1,600
Service Providing	64,300	63,000	64,000	62,900	65,500	67,000	68,400	70,900	74,100	76,700	80,800	83,300	84,700	84,700	85,600	86,800
Private Service Producing	47,100	48,600	48,400	46,700	48,200	48,700	49,300	51,600	55,000	56,700	57,700	60,600	61,700	62,300	63,600	64,900
Trade, Transportation and Utilities	15,500	15,000	15,000	14,300	14,400	15,000	15,200	15,600	16,400	17,100	18,100	18,800	18,900	19,100	19,600	20,000
Wholesale Trade	1,400	1,500	1,500	1,400	1,400	1,500	1,600	1,700	1,800	2,000	2,400	2,500	2,300	2,200	2,500	2,600
Retail Trade	11,100	10,400	10,200	9,700	10,100	10,500	10,400	10,700	11,400	12,000	12,600	13,100	13,300	13,300	13,500	13,800
Food and Beverage Stores	2,800	2,800	2,700	2,200	2,100	2,200	2,300	2,400	2,600	2,600	2,600	2,900	3,000	3,000	3,000	3,000
General Merchandise Stores	1,400	1,300	1,100	1,100	1,200	1,300	1,200	1,400	1,500	1,500	1,500	1,600	1,600	1,400	1,500	1,600
Residual-Miscellaneous Store Retailers	6,900	6,400	6,300	6,400	6,800	7,000	6,900	7,100	7,400	7,900	8,500	8,800	8,800	8,800	9,000	9,300
Transportation, Warehousing and Utilities	3,000	3,100	3,400	3,300	3,000	3,100	3,200	3,300	3,200	3,100	3,200	3,200	3,300	3,500	3,700	3,700
Utilities	2,100	2,100	2,100	2,100	1,900	2,000	2,000	2,100	2,000	1,900	1,800	1,700	1,800	1,900	2,100	2,100
Transportation and Warehousing	900	1,000	1,200	1,200	1,100	1,100	1,200	1,200	1,200	1,400	1,500	1,500	1,600	1,600	1,600	1,600
Information	1,500	1,300	1,300	1,300	1,300	1,300	1,400	1,400	1,300	1,600	1,800	1,800	1,500	1,400	1,500	1,600
Financial Activities	3,600	3,400	3,400	3,300	3,300	3,200	3,200	3,300	3,600	3,700	3,700	3,800	4,300	4,400	4,700	4,800
Finance and Insurance	2,500	2,200	2,200	2,100	2,000	1,900	1,900	1,800	2,000	2,100	2,100	2,200	2,500	2,600	2,600	2,600
Real Estate and Rental and Leasing	1,100	1,100	1,200	1,200	1,300	1,300	1,400	1,500	1,700	1,600	1,600	1,600	1,700	1,800	2,000	2,200
Professional and Business Services	5,600	5,700	5,800	5,800	6,000	5,800	6,400	6,900	7,600	8,300	8,800	9,000	8,900	8,500	8,800	8,800
Educational and Health Services	6,300	6,800	6,700	6,900	7,500	7,700	8,000	8,200	8,500	8,500	8,700	9,600	10,000	10,300	10,500	10,800
Leisure and Hospitality	10,600	10,200	10,300	10,200	11,100	11,800	11,300	11,300	11,900	12,300	13,000	13,200	13,800	14,300	14,400	14,700
Arts, Entertainment, and Recreation	1,000	1,000	1,000	900	900	1,000	1,100	1,000	1,100	1,000	1,100	1,000	1,200	1,300	1,400	1,400
Accommodation and Food Service	9,600	9,100	9,300	9,300	10,200	10,800	10,300	10,300	10,800	11,200	11,800	12,100	12,500	12,900	13,100	13,300
Accommodation	2,400	2,000	1,900	1,900	2,400	2,500	1,900	2,100	2,300	2,600	2,800	2,900	3,100	3,000	3,200	3,400
Food Services and Drinking Places	7,300	7,200	7,400	7,400	7,800	8,400	8,300	8,200	8,500	8,700	9,100	9,200	9,500	9,900	9,900	10,000
Other Services	4,400	4,000	3,600	3,500	3,700	3,700	3,700	3,800	3,600	3,700	4,300	4,400	4,400	4,300	4,100	4,300
Government	16,900	16,700	18,000	17,600	18,100	18,600	19,300	20,300	21,200	21,600	22,400	22,800	23,000	22,400	22,000	21,800
Federal Government	700	700	700	700	700	700	700	700	700	700	800	700	700	700	600	600
State and Local Government	16,200	16,000	17,300	16,800	17,300	17,900	18,600	19,600	20,500	20,800	21,600	22,100	22,300	21,800	21,300	21,200
State Government			8,200	7,800	8,100	8,400	8,700	8,800	8,800	9,000	9,200	9,400	9,500	9,600	9,300	9,300
State Government Education			3,100	2,900	3,000	3,200	3,300	3,500	3,500	3,600	3,700	3,700	3,700	3,800	3,500	3,500
Other State Government			5,100	4,900	5,100	5,200	5,300	5,300	5,300	5,400	5,500	5,600	5,800	5,800	5,800	5,800
Local Government			9,100	9,000	9,200	9,500	9,900	10,800	11,700	11,800	12,500	12,700	12,800	12,200	12,000	11,900

**Appendix 37 – Retail Sales by Type (SLO County)**

Indexed to 1990 = 100

Source: California Board of Equalization and ERA



### Appendix 38 – All Retail Sales

Indexed to 1990 = 100

Source: California Board of Equalization and ERA

