

San Luis Obispo County

Industry Clusters of Opportunity

Quarter 4 – October 2016

These Clusters of Opportunity are high regional growth industries within San Luis Obispo County. Local strategy focuses to build prosperity and continued job growth within these clusters. The San Luis Obispo County Industry Clusters of Opportunity analyzed in this report closely follow those identified in previous countywide reports, however in some cases, relevant industries were added to established clusters and cluster definitions were refined to utilize the North American Industry Classification System (NAICS). The six clusters are as follows:

1. Building, Design, & Construction	2. Energy	3. Health Services	4. Knowledge & Innovation	5. Specialized Manufacturing	6. Uniquely SLO County
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1. Building, Design, and Construction

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
9,039	+0.3%	+22.1%	+24.4%	\$54,109
+250 jobs from Q3	30 jobs	1,638 jobs	1,808 jobs	
Total Jobs by SLO County sub-region	Coastal	North County	San Luis Obispo City	South County
	696 jobs	3,139 jobs	3,208 jobs	1,972 jobs

2. Energy

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
1,999	+21.7%	+64.8%	+63.3%	\$157,726
+255 jobs from Q3	357 jobs	786 jobs	768 jobs	
Total Jobs by SLO County sub-region	Coastal	North County	San Luis Obispo City	South County
	238 jobs	618 jobs	650 jobs	476 jobs

3. Health Services

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
13,035	+3.1%	+26.8%	+40.8%	\$46,088
-46 jobs from Q3	398 jobs	2,755 jobs	4,193 jobs	
Total Jobs by SLO County sub-region	Coastal	North County	San Luis Obispo City	South County
	608 jobs	4,224 jobs	5,894 jobs	2,309 jobs

4. Knowledge & Innovation Services

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
6,805	+4.4%	+40.8%	+68.0%	\$41,598
+440 jobs from Q3	286 jobs	1,971 jobs	3,285 jobs	
Total Jobs by SLO County sub-region	Coastal	North County	San Luis Obispo City	South County
	175 jobs	1,113 jobs	4,862 jobs	649 jobs

5. Specialized Manufacturing

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
3,689	-0.2%	+14.5%	+21.7%	\$54,921
+118 from Q3	-7 jobs	468 jobs	585 jobs	
Total Jobs by SLO County sub-region	Coastal 412 jobs	North County 1,684 jobs	San Luis Obispo City 1,105 jobs	South County 480 jobs

6. Uniquely SLO County

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
24,171	+4.5%	+21.6%	+29.3%	\$24,682
+70 from Q3	1,037 jobs	4,289 jobs	5,820 jobs	
Total Jobs by SLO County sub-region	Coastal 3,028 jobs	North County 9,940 jobs	San Luis Obispo City 5,832 jobs	South County 4,862 jobs

Additional Growth Industry Opportunities

7. Information

Main components include publishing industries (software & both traditional publishing & publishing exclusively on the Internet); telecommunications industries; Web search portals, data processing industries, & the information services industries.

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
1,427	-0.3%	+23.5%	+44.5%	\$67,726
-34 from Q3	-4 jobs	272 jobs	514 jobs	
Total Jobs by SLO County sub-region	Coastal 105 jobs	North County 562 jobs	San Luis Obispo City 618 jobs	South County 137 jobs

8. Wineries

Included in the Uniquely SLO County Cluster, the winery industry is the third highest concentrated industry in SLO County meaning it is **38 times more concentrated** (see Location Quotient) in this region than average (third behind Farm Management Services & Nuclear Electric Power Generation due to Diablo Canyon).

Total Jobs SLO County	1 year % Change (2015-2016)	5 year % Change (2011-2016)	Projected % Change (2011-2021)	Current Wages
1,958	+6.7%	+50.2%	+68.8%	\$43,653
-5 jobs from Q3	123 jobs	654 jobs	897 jobs	
Location Quotient 38.79				
Total Jobs by SLO County sub-region	Coastal 15 jobs	North County 1,634 jobs	San Luis Obispo City 162 jobs	South County 135 jobs
Total Jobs by Regional Neighbors	Monterey County 885 jobs	Santa Barbara County 1,575 jobs	Kern County 169 jobs	Santa Cruz County 178 jobs

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Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com / EMSI 2016.3, Employees, V1

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