Environmental Scan

A summary of findings from our external environment

March 2017

Gregory M. Stoup
District Office of Research and Planning
1. County Demographics
   • Age distribution
   • Ethnicity profile
   • Origin of Birth / Language spoken
   • Educational Attainment

2. Market for High School Graduates
   • Feeder school performance and trends
   • Capture rates

3. Workforce & Income Summary
   • Labor market trends
   • Income and housing market strength
CCCD Fall Headcount since 1978

- Peak of Recession
- Prop 13
- Enrollment Fees begin
- Brentwood Campus opens
- San Ramon Campus opens
- Fee Increase

Graph shows headcount from 1978 to 2016, with notable events such as the peak of recession and the opening of new campuses.
CCCDD Fall Headcount since 1978

- **Period of decline**
- **Period of growth**
- Twenty year period of mostly flat growth with episodes of punctuated enrollment

- Peak of Recession
- San Ramon Campus opens
- Brentwood Campus opens
Contra Costa county was broken up into three regions using census tracks associated with each college’s service area.
Contra Costa County

Demographic Trends
Contra Costa County
Demographic Profile (2015)

<table>
<thead>
<tr>
<th>Size</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>1,096,068</td>
</tr>
<tr>
<td>Growth Rate</td>
<td>10.6% per decade</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age Distribution</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18 yrs old</td>
<td>24%</td>
</tr>
<tr>
<td>18 to 19 yrs old</td>
<td>2%</td>
</tr>
<tr>
<td>20-24 yrs old</td>
<td>6%</td>
</tr>
<tr>
<td>25-44 yrs old</td>
<td>26%</td>
</tr>
<tr>
<td>45-64 yrs old</td>
<td>28%</td>
</tr>
<tr>
<td>65+ yrs old</td>
<td>14%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ethnicity Distribution</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian</td>
<td>0.3%</td>
</tr>
<tr>
<td>Asian / Pac Is.</td>
<td>15%</td>
</tr>
<tr>
<td>Black / Af. Am.</td>
<td>9%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>24%</td>
</tr>
<tr>
<td>Two or More races</td>
<td>4%</td>
</tr>
<tr>
<td>White</td>
<td>48%</td>
</tr>
<tr>
<td>Other race</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>51%</td>
</tr>
<tr>
<td>Male</td>
<td>49%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Foreign Born</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>US Native Born</td>
<td>76%</td>
</tr>
<tr>
<td>Foreign Born</td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Language Spoken at Home</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>English Only</td>
<td>66%</td>
</tr>
<tr>
<td>Other than English</td>
<td>34%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education Attainment</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>High School or less</td>
<td>30%</td>
</tr>
<tr>
<td>AA/AS Degree or some college</td>
<td>31%</td>
</tr>
<tr>
<td>Bachelors Degree</td>
<td>25%</td>
</tr>
<tr>
<td>Graduate or Prof Degree</td>
<td>14%</td>
</tr>
</tbody>
</table>

Note: Fastest growing groups by volume highlighted in orange
Contra Costa County’s Regions

Overall population

West County

Third largest region
• Home to roughly a quarter of a million residents

Slow growth
• Growing at a slower rate than other regions in the county

Central County

Largest region
• Houses more than half the county’s roughly one million residents

Modest growth
• Growing slightly slower than the county average

East County

Second largest region
• Slightly larger than the West county with 284K residents

Rapid growth
• Fastest growing region in the county

Data source: 2010 U.S. Decennial Census and 2015 5-Yr. American Community Survey (ACS). Note: Growth rates are derived from recorded population growth from 2010 to 2015.
Age Distribution

West County
Most diverse by age
• Most balanced age distribution in county

Aging by decline in youth
• Net decline in residents 19 and under and rapid growth of those 65 yrs and older

Central County
Deepest age pool
• Has more residents in every age group than either the West or East County

Aging by growth in elderly
• Has the highest concentration of county residents 65+ yrs old
• Only region experiencing growth in all age groups

East County
Youngest
• Highest concentration of those 19 and under (30%) in county

U-Shaped growth
• Strong growth in both the younger & older age groups.

Note: Growth rates are derived from recoded growth from 2010 to 2015.
Ethnicity Narrative

**West County**
- **Ethnically diverse**
  - Highest concentration of residents of Asian African Americans decent.
- **Rapid decline of African-Americans**
  - Rapid decline in African American population (-9%)
  - Slowest growth in Asian residents
  - Only area to experience a significant increase in White residents

**Central County**
- **Least diverse**
  - Nearly two of every three residents are White; all remaining ethnic groups having lower concentrations than the county average
- **Growing more diverse**
  - Rapid growth among Asian/Pac. Is African American and Two or More Races

**East County**
- **Bimodal population**
  - Three of every four residents are either White or Hispanic
- **Rapid growth among minorities**
  - Growth in residents of Two or More Races outpaced all other ethnic groups combined
  - Fastest growing region among Asian/Pac. Is.

Note: Growth rates are derived from recoded growth from 2010 to 2015.
Distribution of Racial and Ethnicity Groups in Contra Costa and Alameda Counties


Map source data come from the Census Bureau's American Community Survey, based on samples from 2005 to 2009. Because these figures are based on samples, they are subject to a margin of error, particularly in places with a low population, and are best regarded as estimates.
## Origin of Birth and Language Spoken

<table>
<thead>
<tr>
<th>West County</th>
<th>Central County</th>
<th>East County</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Origin of Birth</strong></td>
<td><strong>Origin of Birth</strong></td>
<td><strong>Origin of Birth</strong></td>
</tr>
<tr>
<td>High and growing density of foreign born residents</td>
<td>Low density but fast growth among foreign born residents</td>
<td>Growth of foreign born pushing region toward parity with the county</td>
</tr>
<tr>
<td>• Highest concentration of foreign born residents (32%) and growing.</td>
<td>• Roughly four in five residents are Native US born</td>
<td>• Roughly three of four residents are Native US born</td>
</tr>
<tr>
<td><strong>Language Spoken</strong></td>
<td><strong>Language Spoken</strong></td>
<td><strong>Language Spoken</strong></td>
</tr>
<tr>
<td>English speakers soon to be the minority</td>
<td>Highest density of English speakers but transforming</td>
<td>Fastest growth among non-English speakers</td>
</tr>
<tr>
<td>• Nearly half (47%) of residents don’t speak English at home and this group is growing at seven times the rate of the rest of the region</td>
<td>• With roughly three in four residents speaking English at home the Central county has a higher concentration of English speakers than the county overall</td>
<td>• One in three resident speak a language other than English at home and the non-English speaking group is growing faster here than the rest of the county</td>
</tr>
</tbody>
</table>

**Note:** Growth rates are derived from recoded growth from 2010 to 2015. Data sources: 2010 U.S. Decennial Census and 2015 5-Yr American Community Survey.
Education Attainment

West County
- Slightly less educated than the county overall
  - Nearly 39% of the population has no more than a High School diploma
- But growing more educated
  - 31% of residents have a Bachelors degree or higher

Central County
- Home to the most educated population
  - Over 50% of the population has a Bachelors and/or graduate degree
- And growing still more educated
  - The most growth is occurring among people with Bachelors and graduate degrees

East County
- Least educated region
  - Less than 20% of the population has bachelors or graduate degree
- Strong growth in community college credentials
  - The fastest growing segment are among residents with an Associates Degree or having some college

Note: Growth rates are derived from recoded growth from 2010 to 2015.
The market for high school graduates
Contra Costa County
The market for high school graduates

**Size**
Graduates = 12,366 (2014)
Growth Rate = 9% (2014/15-2025/26)
Projected = 13,441 (2025)

**College-going Rates**
- CCCs = Less than 25%
- CSUs = 9% to 11.9%
- UCs = Greater than 6.5%

**CCCCCD HS Graduate Capture Rate**
- 3,456 of 12,366 = 28%

**Overall Remediation Rate**
- Placement into dev ed = 80%
- Enrolling in dev ed = 45%

Contra Costa County
The market for High School Graduates

**CCC**
Weak growth
- Graduates of feeder High Schools growing at one-fourth the rate of the county

Capture rates stable
- CCC capture rates of feeder high school graduates remains stable at 26%, slightly below the county average of 28%

**LMC**
Booming HS graduate population
- Graduation rate at feeder HS over the rate of the county

Rising capture rates
- LMC capture rates of feeder high school is improving, moving from below the county average in 2000/01 to 5% above in 2015/16

**DVC**
Moderate growth
- Graduation rate at feeder HS is slightly less than the county average

Capture rates stable
- DVC capture rates of feeder high school graduates remains stable at 26%, slightly below the county average of 28%

Data sources: California Dept of Education and Colleague.
### CCC
**Feeder high schools are midlevel performers**
- As a group four all of CCC’s seven feeder high schools are below the state average.
- Two of the high schools have the lowest performance.

### DVC
**Feeder high schools are home to the most academically prepared**
- Of the District’s 29 primary feeder high schools, the 12 highest ACT scores belong to DVC feeder schools.
- All but two of DVC’s feeder high schools score above the statewide average of 57.45.

### LMC
**Service area contains some of the lowest performing high schools**
- All but one of LMC’s seven feeder high schools score below the state average.

Source: California Department of Education: [http://dq.cde.ca.gov/Dataquest](http://dq.cde.ca.gov/Dataquest). ACT scores range from 1 to 36 points. The percentage of scores >=21 is used as a benchmark. This percentage is calculated by dividing the "Number of Scores >=21" by the "Number Tested." For more information on ACT, go to: [http://www.cde.ca.gov/ds/sp/ai/glossaryact2014.asp](http://www.cde.ca.gov/ds/sp/ai/glossaryact2014.asp)
Contra Costa County

Workforce & Income
Contra Costa County
Workforce & Income Profile

**Labor Market**
- Jobs = 530,221
- Proj Job Growth (2010-2016) = 13.4%
- Unemployment Rate (2017) = 4.3%

**Industries adding most jobs**
- Services for the Elderly and Persons with Disabilities
- Corporate, Subsidiary, and Regional Managing Offices
- Limited-Service Restaurants

**Fastest growing Occupations**
- Taxi Drivers and Chauffeurs
- Personal Care Aides
- Food Preparation & Serving

**Household Income**
- Median Income = $80,185 (2015)
- Income Growth = 2.3% (2010-2015)

**Poverty**
- Individual Poverty Rate = 10.9%
- All families = 11.4%
- Families w/ children = 17.3%
- Female Head of Household = 24.8%

**Median Home Value**
- In 2015 = $439,000
- Growth (2010-2015) = (-19.8)

Data sources: U.S. Census Bureau; American Community Survey; EMSI Data reports.
Map source data come from the Census Bureau's American Community Survey, based on samples from 2005 to 2009. Because these figures are based on samples, they are subject to a margin of error, particularly in places with a low population, and are best regarded as estimates.
Contra Costa County
Workforce & Income Profile

West County
Pockets of unemployment & high poverty
- At 4.1% the unemployment rate is slightly lower than the county average overall
- The poverty rate (14.5%) is higher than the county average of 10.9%

Stagnant income growth & struggling housing market
- Household incomes ($62.9K) are below the county average of 80.1K.
- Likewise, housing values are declining faster than the county average.

Central County
Strong labor market & low levels of poverty
- The unemployment rate (4.0%) and poverty rates (7.5%) remain below the county average

High income & high home valuations
- At $95.1K household incomes are the highest in the county and growing three times faster than the county average.
- Housing values are the highest in the county at $615K

East County
Higher unemployment, weak job growth & growing poverty
- Unemployment rates are highest in the county at 5.4%
- At 19.8% the poverty rate is nearly double the county average but the rate of growth is fastest in the county

Low income & declining housing market
- Household incomes are lowest in the county ($55K).
- Median house values have dropped faster than other areas in the county.

Data sources: U.S. Census Bureau; 2010 and 2015 5-Yr. American Community Surveys.
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<td>Education Attainment</td>
<td>Slightly less educated but growing more so</td>
<td>Most educated and growing more so</td>
<td>Least educated; strong growth in AA degrees</td>
</tr>
<tr>
<td>HS Graduate Market</td>
<td>Weak growth; stable capture rates</td>
<td>Moderate growth; stable capture rates</td>
<td>Booming growth; rising capture rates</td>
</tr>
<tr>
<td>Feeder HS ACT Profile</td>
<td>Midlevel performing</td>
<td>Highest performing</td>
<td>Lowest performance</td>
</tr>
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<td>Labor Market</td>
<td>Pockets of unemployment; high poverty</td>
<td>Strong labor market; low levels of poverty</td>
<td>Weak job growth; growing poverty</td>
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<td>Income &amp; Housing Market</td>
<td>Stagnant income; declining housing value</td>
<td>High income and high home valuations</td>
<td>Low income &amp; declining housing market</td>
</tr>
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THANK YOU!

And special thanks to the Contra Costa District research staff who demonstrated outstanding data collection and research in support of the findings included in this report.