



San Diego Community College District

Environmental Scan Update

April 15, 2021

Context

- Since March 2020, the COVID-19 pandemic has led to significant business closures, job losses and decrease in students enrollment. The impacts have reshaped the local socio-economic outlook of the region.
- In the past year, the Office of Institutional Research and Planning (OIRP) has presented two updates on the environmental scan pre and during COVID-19.
- This update gathers analysis of our region after a year of the pandemic.



Topics

1. Regional Economic Impact
2. Enrollment trends
3. Basic Needs
4. Looking Ahead

Regional Economic Impact



San Diego Historical Economic Composition

1940's

- Pre-WWII military, retail, manuf. and FI/Prof make up 70% of the local economy
- Population ~ **300,000**

1960's

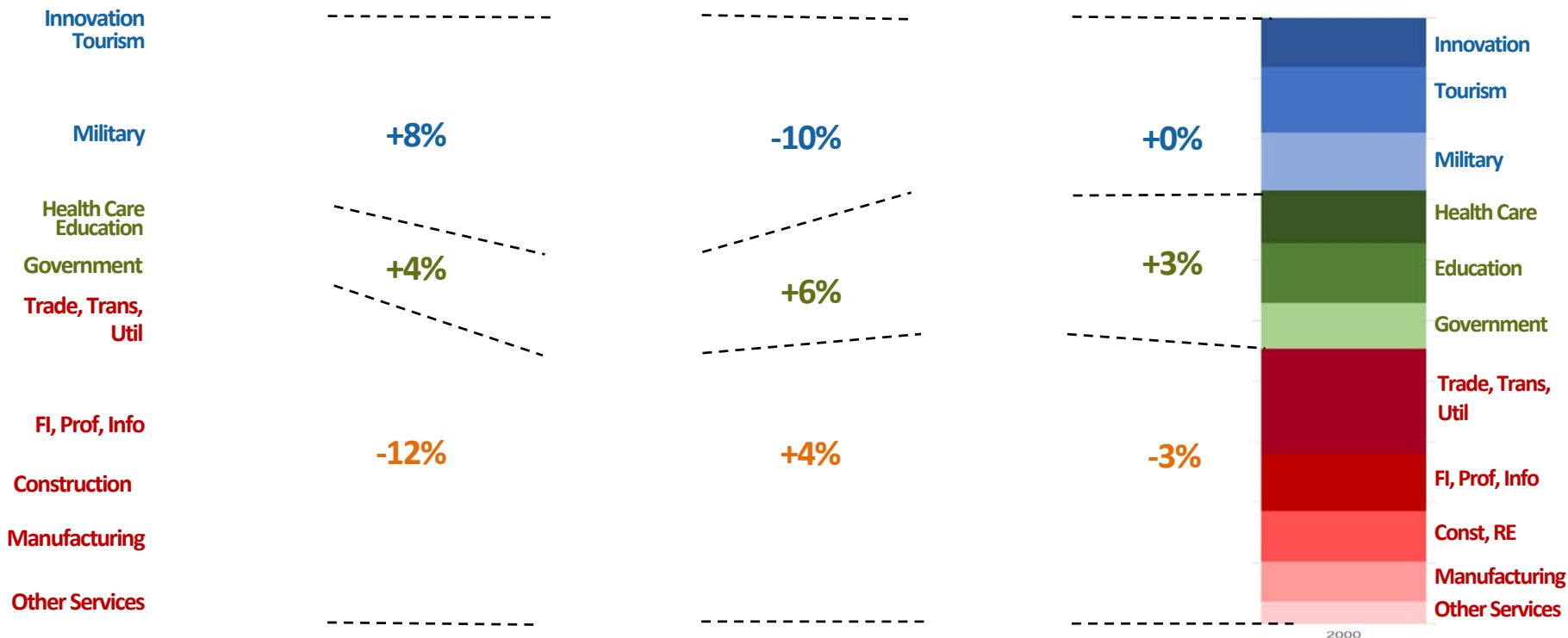
- Vietnam War
- UCSD opens campus ('64)
- Sea World opens ('64)
- Mexico approves maquiladoras ('65)
- Population ~ **1,000,000**

1980's

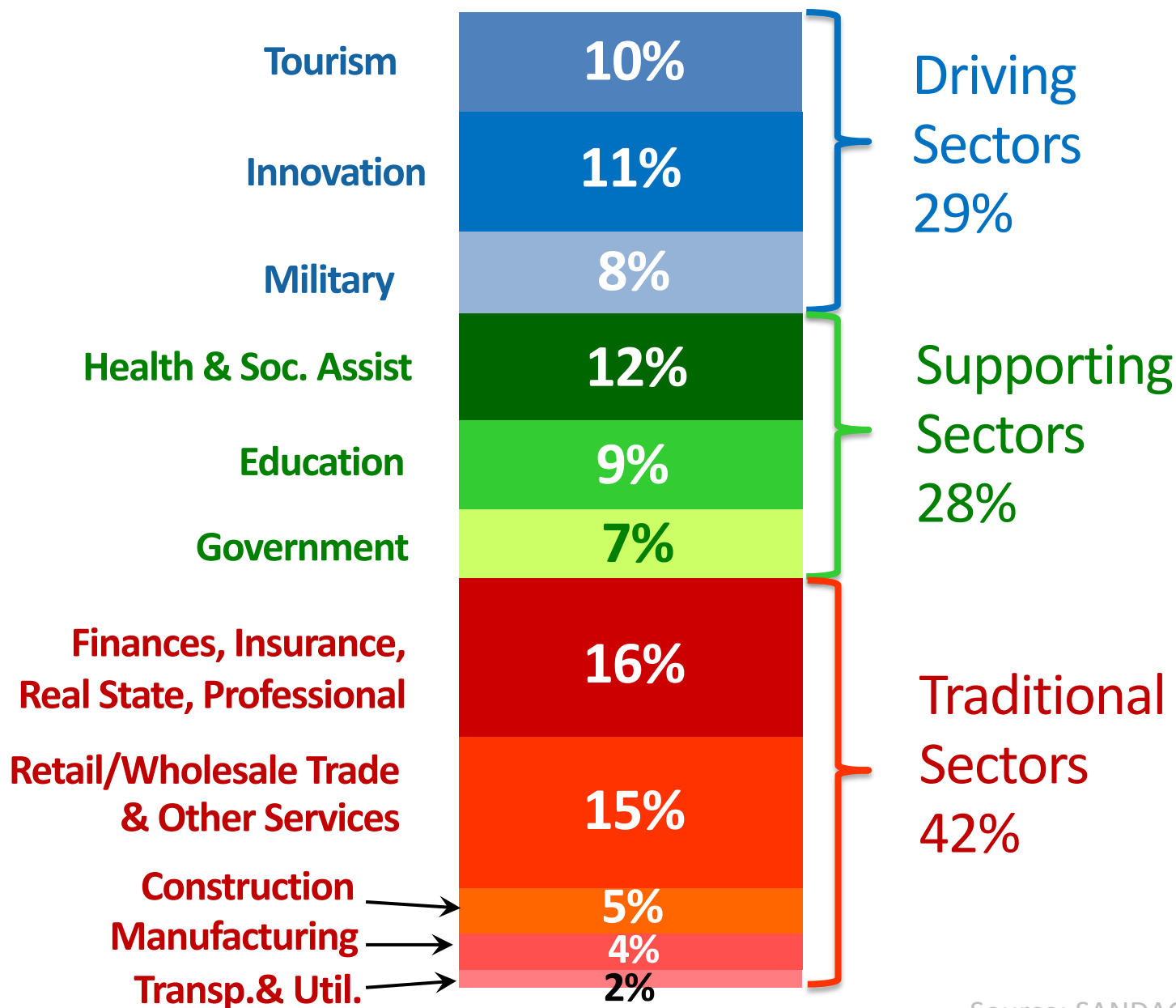
- Hybritech ('78)
- BRAC closes NTC ('93)
- Tourism begins to grow
- Population ~ **2,000,000**

2000's

- Dot-Com bust
- 2000 Recession
- 9/11
- Population ~ **3,000,000**



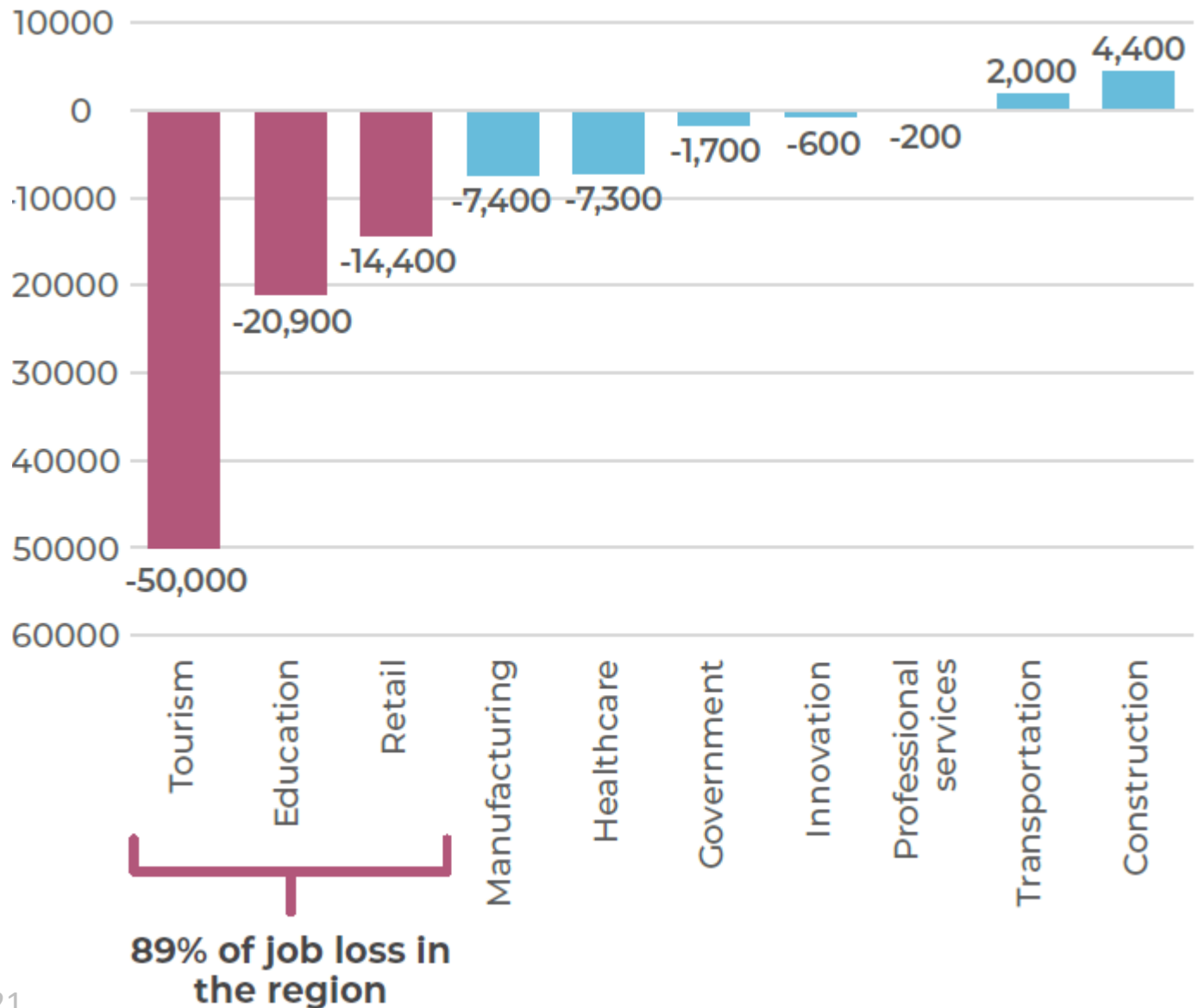
San Diego Economic Composition 2020



Job loss by Economic Sector

Visitor spending in the San Diego region fell from **\$11.6 billion** in 2019 to **\$5.2 billion** in 2020

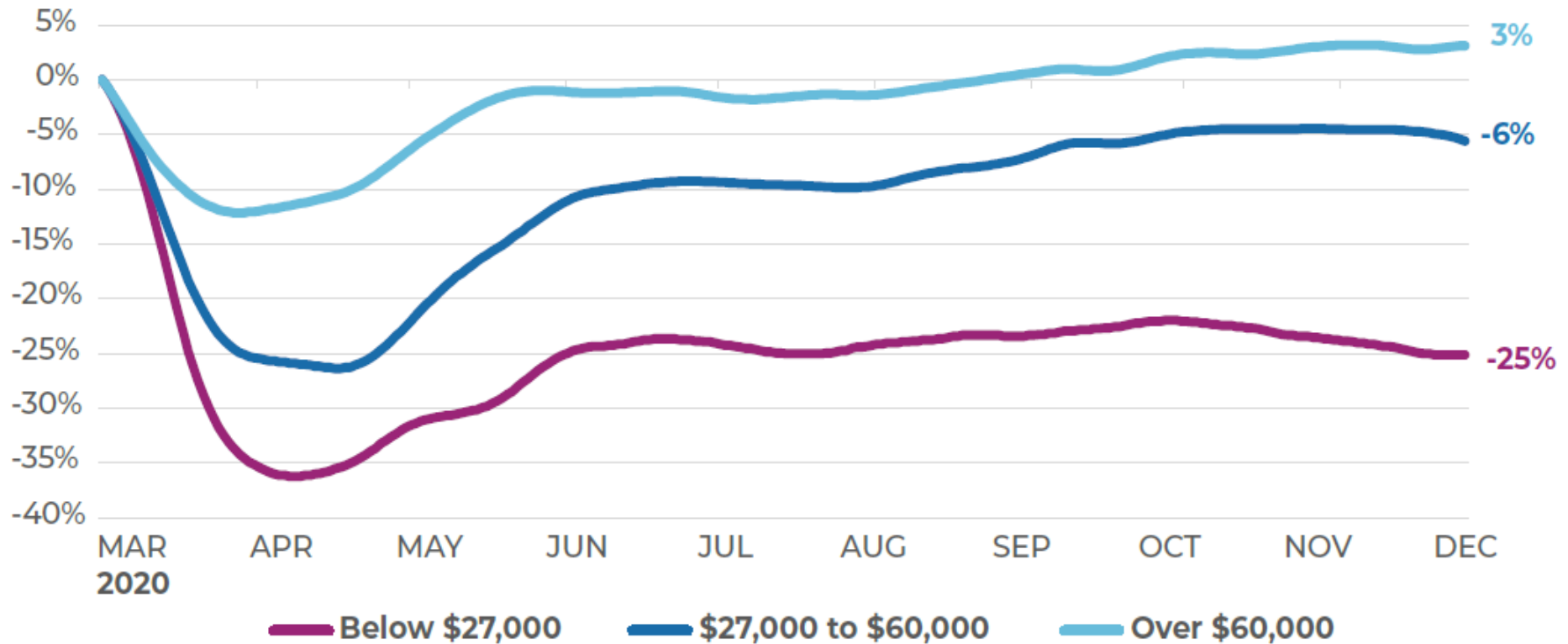
Visitor industry lost **20 years of economic gain** in 2020 and expects a **five-year recovery horizon**



Effect on Employment

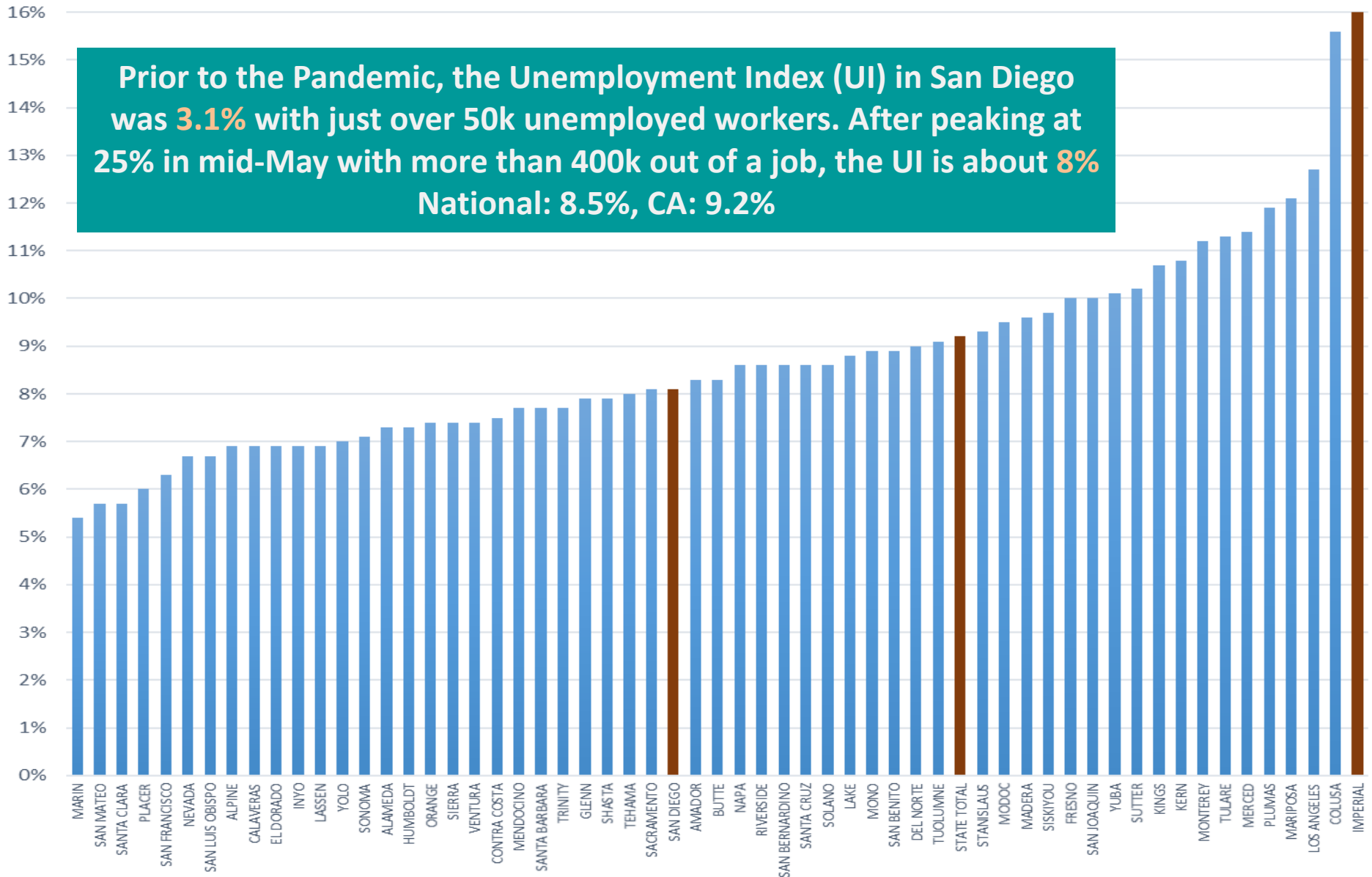


The pandemic has disproportionately impacted low-wage workers. As of December 2020, there were 25% fewer people employed in the lowest income category.



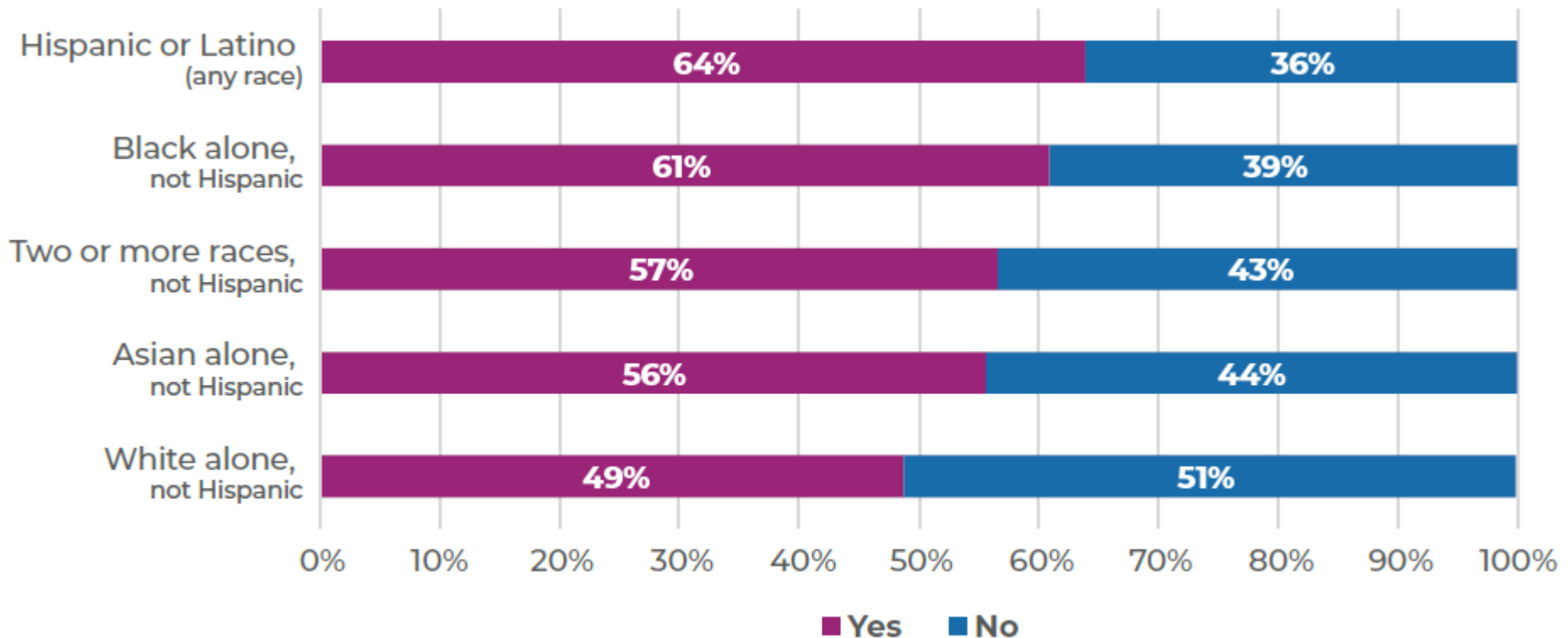
Unemployment in CA

Prior to the Pandemic, the Unemployment Index (UI) in San Diego was **3.1%** with just over 50k unemployed workers. After peaking at **25%** in mid-May with more than 400k out of a job, the UI is about **8%**
 National: 8.5%, CA: 9.2%



Loss of Employment by Race/Ethnicity

64% Of Hispanic/Latinx individuals and 61% of those who identified as Black reported that they or someone in their household had been negatively impacted economically as a result of the pandemic



Enrollment

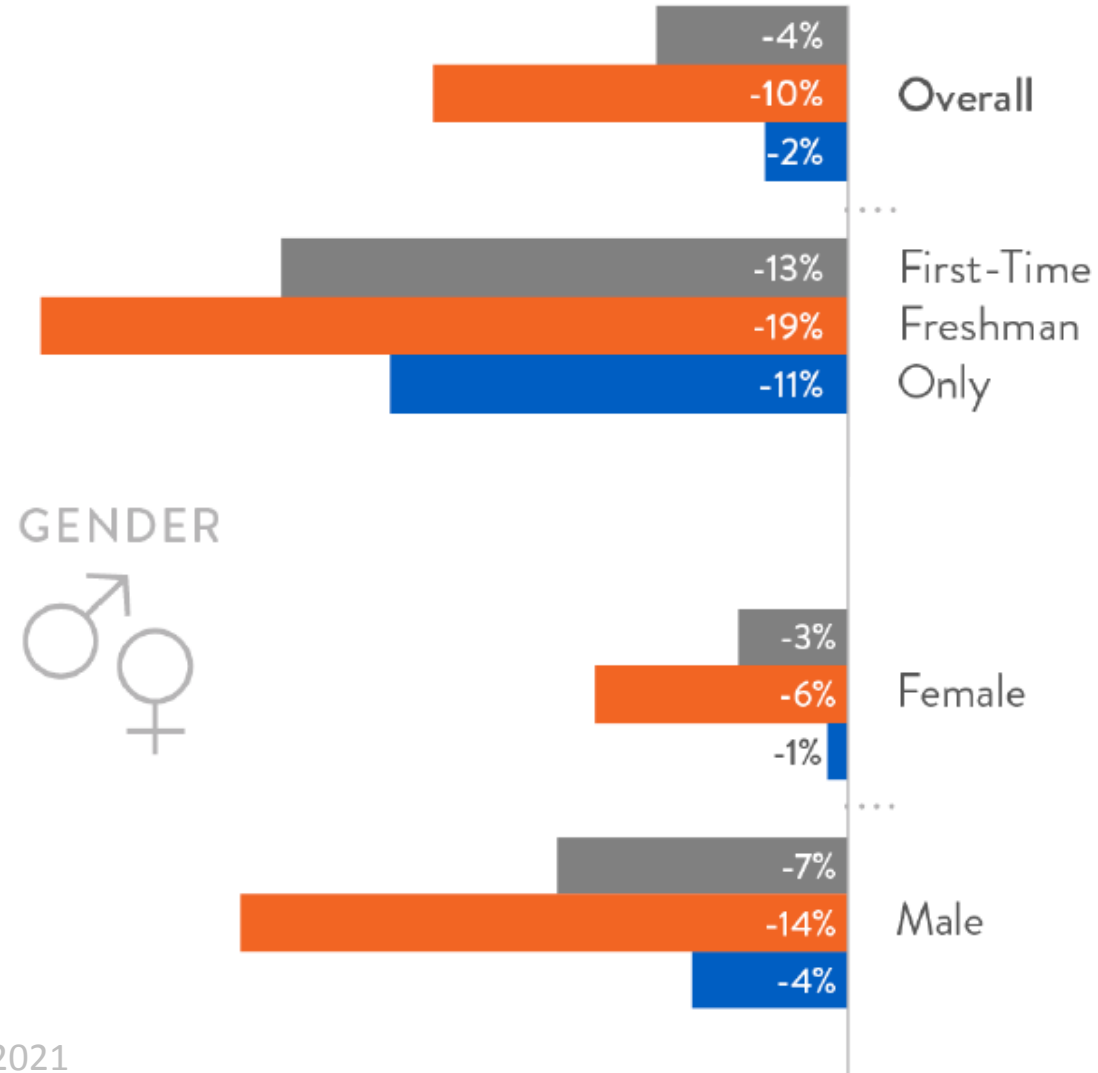


Enrollment changes from previous year

The gap in enrollment is higher for Black (-13%), Hispanic (-11%) and Native American (-13%) students (not shown)

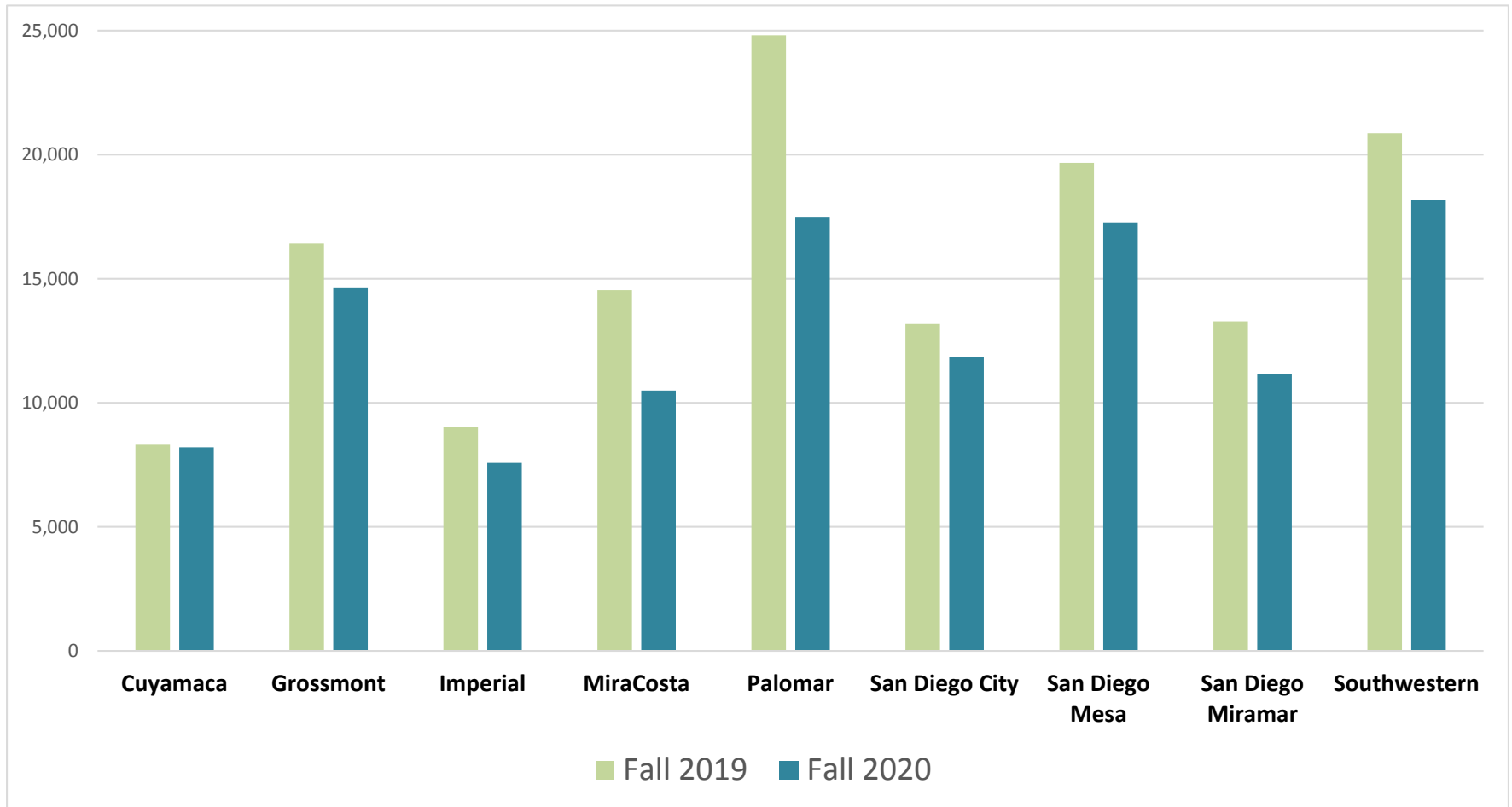


Overall Two-Year Four-Year



Headcount changes

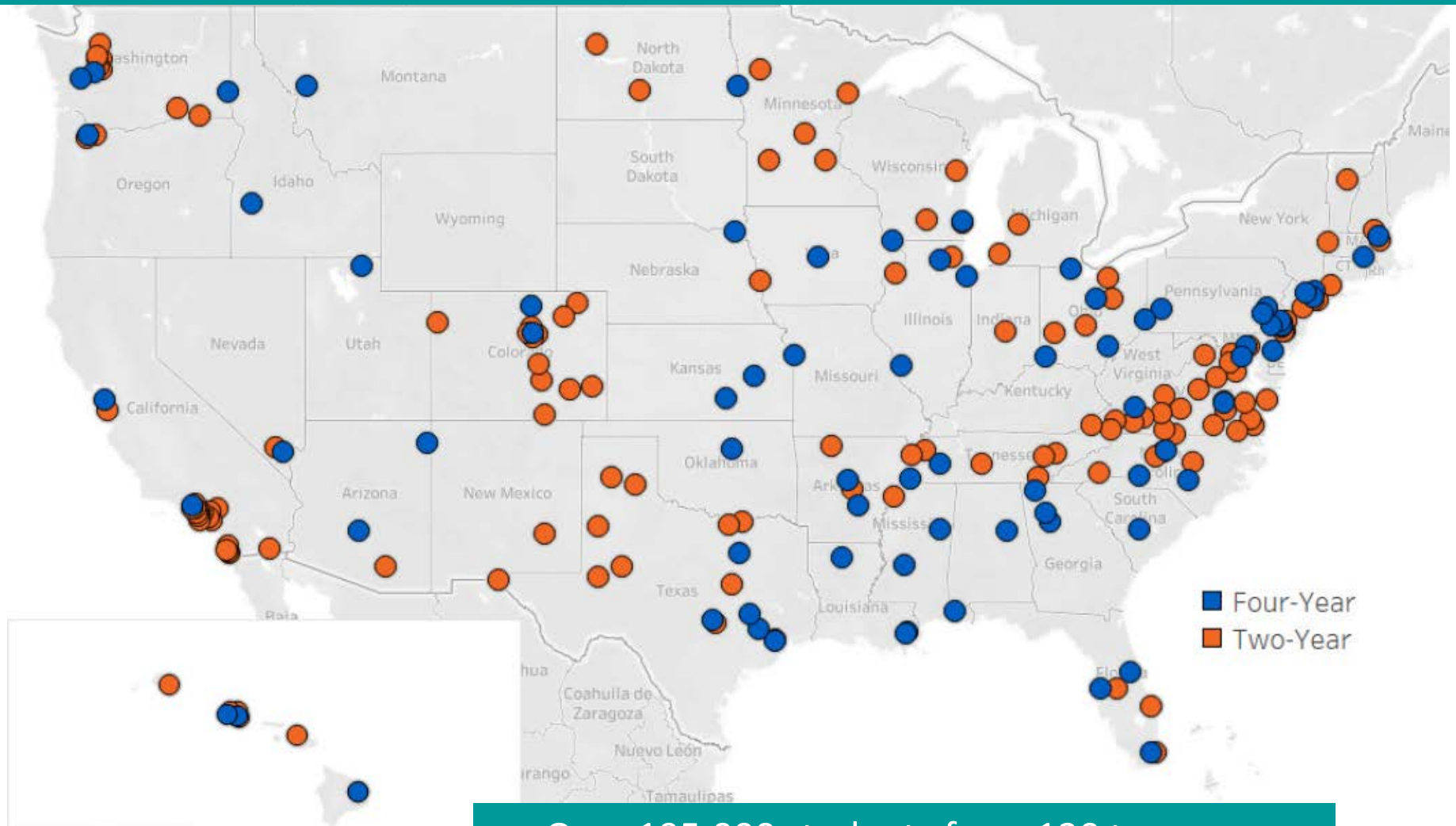
Statewide there has been a decrease in the headcount of students enrolled at community colleges. Statewide headcount decreased 17% (264,132) from Fall 2019 to Fall 2020. Some colleges in the region have seen decreases close to the 30%. Shown below are the colleges in San Diego-Imperial County area.



Basic Needs



Basic Needs HOPE Survey



Over 195,000 students from 130 two-year colleges and 72 four-year colleges and universities responded to the 2020 #RealCollege Survey.

Basic Needs

Last Fall, the #Real College Survey by the HOPE Center had **10,596** respondents districtwide among SDCCD students. This is a 102% increase from the Fall 2019 survey.

 THE
BLACK/WHITE GAP
IN BASIC NEEDS
INSECURITY WAS
16 percentage
points

Nationwide

SDCCD Districtwide

Approx. Volume

48%



of respondents were
HOUSING INSECURE
in the prior 12 months

6,200

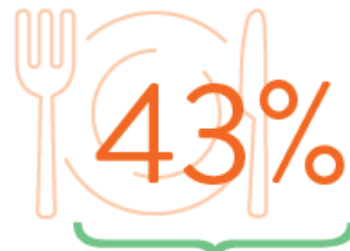
14%



of respondents experienced
HOMELESSNESS
in the prior 12 months

1,900

39%



of respondents were
FOOD INSECURE
in the prior 30 days

4,500

Basic Needs

Nationwide

41%

had a close friend or family member who was sick with **COVID-19**, while

7%

were sick with **COVID-19** themselves

SDCCD Districtwide

40%

Approx. Volume

4,200

6%



635



35% of students exhibited at least moderate anxiety

34%

3,700

Basic Needs

According to a recent survey, the top 3 ways Californians reported spending their stimulus checks included:



Nationwide



SDCCD Districtwide

55%

Looking Ahead



U.S. Personal savings rate

While consumption has been partly limited by the business shutdowns (fewer opportunities to spend due to access restrictions), several other factors have contributed to the increase in the savings rate including the **time it took to be able to spend stimulus money** and **precautionary saving behaviors** due to concerns about **future economic disruption** and **income losses**.



Pandemic Resilient Jobs

The San Diego-Imperial Center of Excellence for Labor Market Research (COE) analyzed jobs that appeared resilient during the pandemic. These are the with the most online job postings during the pandemic. New data (July through December 2020) revealed 8 pandemic-resilient jobs that did not appear between March and June 2020:

1. Automotive Service Technicians and Mechanics
2. Financial Analysts
3. Medical and Clinical Laboratory Technicians
4. Nursing Assistants
5. Preschool Teachers
6. Real Estate Agents
7. Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
8. Teacher and Instructors



Looking Ahead

1. Business sectors that fared well during the pandemic should continue to grow at a steady pace. These include **innovation, manufacturing, construction, finance, insurance**, and military.
2. Sectors that were hardest hit, such as **tourism, retail, and education**, should quickly return to normal as the economy reopens. Full recovery can take years.
3. Savings expending will support the economic recovery. This will lead to part time jobs and **skill based** knowledge learning.
4. The American Rescue Plan Act of 2021 \$1.9 trillion bill, along with other Federal support, will continue to bolster the economy in 2021.

Hierarchy of Needs

Colleges must prepare to support the aftermath of COVID-19 as students and their support systems face challenges that lay along all hierarchy of needs.



Questions to:

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