



SANTA BARBARA COUNTY WORKFORCE DEVELOPMENT BOARD & SANTA BARBARA FOUNDATION

Santa Barbara County COVID-19 Impact Report

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Executive Summary

INTRODUCTION

The Santa Barbara County Workforce Development Board and the Santa Barbara Foundation engaged BW Research to develop a better understanding of the economic and workforce impacts of the COVID-19 pandemic on the county's economy and residents. The data in this report highlight the impacts of the pandemic and provide early clues into the speed and shape of the recovery. This data supplies stakeholders and policy makers with a data-supported viewpoint and features several opportunities to support an expedited and equitable recovery.

This research was produced through data collected via surveys of residents and non-profit employers in Santa Barbara County, as well as a range of public and proprietary data sources. Several datasets used in this report were produced specifically for tracking the impacts and outcomes of the pandemic. The analyses and discussion around the survey and secondary data are contextualized by executive interviews with local stakeholders.

KEY FINDINGS

1

The county's businesses appear to be at an inflection point, as leading indicators suggest the recovery is underway. Several leading indicators in this report suggest that a recovery is already in progress and accelerating in Santa Barbara County. Metrics such as job postings, consumer spending, and new business formations suggest that businesses and consumers are preparing to ramp up their economic activity. It will be important to continue tracking these metrics, particularly within specific industry clusters, to monitor rate and duration of the return in activity and how the economy is likely to emerge from the pandemic.

2

Higher-paying industry clusters in Santa Barbara County experienced a minor recession through the pandemic, while lower-paying industry clusters went through an economic earthquake. Between February of 2020 and February of 2021, industry clusters in Santa Barbara County, like Information and Communication Technologies (ICT) and Finance, Insurance, and Real Estate (FIRE) with average annual earnings greater than \$90,000, saw a decline in employment between one and two percent—roughly what is expected in a minor recession. Lower paying industries, like Tourism, Hospitality and Recreation and Other Services (which includes services such as hair salons, spas, and dry cleaners) with average annual earnings below \$45,000, experienced a drop in employment between 15 and 40 percent. For more information on the impact the pandemic had on Santa Barbara County's industry clusters, please see page 15.

3

Several key industry clusters will help provide a robust and equitable recovery in the county. This report focuses on several target industry clusters, including Healthcare; Building and Design; Finance, Insurance, Banking, and Real Estate; and Professional and Business Services. These clusters demonstrated resiliency during the pandemic and are well-positioned to see substantial growth over the course of the recovery. Crucially, these industry clusters offer a range of career pathways that provide living wages and upward mobility so that workers of all backgrounds may begin careers that offer economic security and career satisfaction. For more information on career pathways in these industry clusters, please see page 31

4

The impacts of disruption to schools and childcare are substantial and are continuing to affect the Santa Barbara County economy. Of households with children that require adult supervision, four out of five (79%) reported at least one adult had taken on additional childcare duties. As a consequence of additional child-related duties, these parents and guardians—75% of which are women—faced work disruptions. Forty-two percent reported altering their work schedule and another 25% reported leaving their job entirely. More than half (56%) report that these impacts are still ongoing, as of April 2021. These data suggest substantial portions of the workforce are reducing their hour or leaving the labor force entirely, diminishing the pool of potential workers in the region, decreasing household incomes, and lowering the economic appetite for regional spending.

5

The labor market is experiencing an exceptional level of churn, which presents both challenges and opportunities to the local economy. High levels of unemployment, disruption due to childcare needs, health concerns, bolstered unemployment insurance, and a nationwide reexamination of what work looks like have contributed to a frothy labor market. This tumult offers both a challenge and opportunity for the county; if workers remain displaced for long periods of time, they may struggle to re-enter the labor market. Conversely, a re-sorting of workers has potential to promote upward mobility and erode barriers that otherwise propagate systemic inequalities.

6

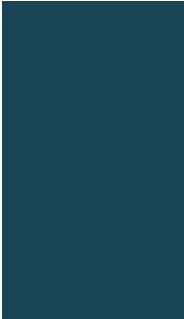
The unprecedented scale and breadth of stimulus spending likely prevented greater economic pain. Roughly 8,100 Santa Barbara businesses that employ nearly 90,700 people received a total of \$967 million in PPP loans during the first round. This means that about 43% of the Santa Barbara County workforce is employed at businesses that received PPP loans. Stimulus payments to individuals—providing up to \$3,200 in direct cash payments among other benefits—likely had substantial impact on the financial security of many Santa Barbara County households. Sixty percent of residents reported that at least one member of their household received stimulus checks. When asked about the impact of a surprise \$500 household expense, 25% of respondents reported it would have “considerable impact” and another 35% reported it would have ‘some impact.’ It is likely that these figures would have been even higher if these questions had been asked before the stimulus checks had arrived.

7

The county’s high costs of living drive the greatest hiring challenges that non-profit organizations face. Eight-in-ten non-profit employers stated they had at least ‘some difficulty’ attracting and retaining employees due to the inability to find affordable housing within a reasonable distance from work. Furthermore, limited talent pools—which is likely a symptom of high housing costs—was cited as the most common challenge for both entry-level and non-entry-level workers alike. Non-profit employers also cited, through open ended responses, an inability to meet the wage demands of potential talent. High wage demands are likely another symptom of high costs of living in the county.

8

Despite the dawning of an economic recovery, most households have moderate to negative outlooks on the immediate future and a more negative outlook for next generation. More than four-in-ten (43%) of respondents feel that job opportunities in



Santa Barbara County for people like themselves will stay the same over the next 3 to 5 years. When asked about the job opportunities for their children or the next generation, respondents' sentiment changed, with 41% predicting that job opportunities would be worse. While some of the detailed drivers of this negative long-term sentiment are not clear, the most common financial concerns for households are high housing costs and not enough income or savings, suggesting that the costs of living and accessibility of living wage careers are considerable factors as Santa Barbara County residents consider the future for the next generation.

CONCLUSIONS & RECOMMENDATIONS

BW Research offers the following conclusions and recommendations to the Santa Barbara County Workforce Development Board, based on the research findings.

1. **Workforce development needs in Santa Barbara County are changing and will continue to change in a post-pandemic economy.** From 2010 through 2019, the Santa Barbara County economy was generally characterized as having low unemployment, but with too many of those jobs in the county being lower paying without enough opportunities to move into higher paying positions. The focus for workforce development was helping workers move into positions that could pay higher wages. The pandemic has had a considerable impact on reducing tier 3 (lower paying) occupations, changing the employment landscape by industry and occupational employment, as well as altering where people are required to be during their workday. These changes have three key implications for workforce development moving forward.
 - a. **Getting people back to work quickly will become a top priority.** While government stimulus programs have provided some buffers for the region's lowest-paid workers, those buffers will diminish over the next three to six months. About one-in-four Santa Barbara County households, according to the resident survey, indicated an unexpected \$500 household expenditure would have a considerable impact on the household budget, and one-in-three households have delayed or deferred payments for household expenses over the last 12 months. These findings indicate that a relatively large portion of Santa Barbara County households will not be able to go extended periods of time without work and the income that it provides.
 - b. **Educate students and transitioning jobseekers on growing employment opportunities and foundational skills.** In a turbulent labor market, labor market information and career navigation services grow in importance, and it is likely that the unsteady state of the economy, additional unemployment insurance, and the continued health risks, are keeping workers on the sidelines, longer. Providing labor market information and guidance to job seekers will help facilitate the matchmaking process, expedite workers' transitions into new jobs and new industries, and lead to better long-term matches between employers and employees. Training programs that assist workers' transitions to roles outside of their current industry will also be important in settling the current labor market. These programs may be developed in partnership with employers who are looking for employees and that are willing to onboard qualified talent that may have less direct industry expertise.
 - c. **Continue to upskill workers and connect them into sustainable career pathways.** Data and interviews with stakeholders suggest that there is also opportunity to increase the upward

mobility of workers within their current industries and companies. These efforts may include increasing upskilling opportunities that provide workers with new skillsets or supplement workers' existing levels of education. Accessibility is a crucial component to these upskilling opportunities, as workers may be unable or unwilling to reduce their working hours to participate in training. Offering courses on nights or weekends, or collaborating with employers to offer paid training time, will ensure that workers do not have to decide between short term financial security and long-term advancement of their careers.

2. **Consider initiatives that will help get workers back to work and that will increase livability of the county.** The closure of schools and childcare facilities disrupted and dislocated hundreds of workers. Of the Santa Barbara County parents that took on additional childcare duties during the pandemic, 42% altered their work schedule and another 25% ended up leaving their job altogether. The reopening of schools and safe and accessible childcare is a key component in helping these parents and guardians return to the workforce. Efforts that increase the financial and geographic accessibility of quality childcare—while also guaranteeing thorough health and safety measures are followed—has the potential to allow hundreds back into the workforce and improve the quality of life for residents.

The high cost of living is another barrier for workers and their prospective employers as well. High costs of living can deter potential talent from entering the region or taking jobs that do not offer the maximum financial compensation. Housing—the primary driver in high costs of living in the county—has been transformed over the course of the pandemic. On one hand, the growing abundance of remote work means that many employers may be able to retain talent that lives outside the region. Simultaneously, Santa Barbara County is an area renowned for its quality of life, and workers who can work remotely, and are financially able to do so, may move into the county from elsewhere, increasing the demand for housing and driving prices upward. Another pertinent factor introduced through the rise of remote work is a decreased demand for commercial real estate. While many regional employers relayed an interest in retaining at least some in-person capacity, the demand for commercial office space is likely to decline. Should there be a surplus of commercial space, the county should be prepared to rezone these spaces into housing.

3. **Connect and communicate with local businesses and entrepreneurs as they work to re-open, re-imagine, and recover in the post-pandemic economy.** Leading indicators, such as job postings, suggest that many employers are preparing for a rapid increase in demand for their goods and services. Working with employers—particularly those who may be struggling to onboard new talent amidst an unsettled labor market—will help keep businesses who made it through the worst of the pandemic rebuild and recover. Employers will also have to begin making decisions around remote work. Providing resources around best practices may help employers navigate these novel problems and help drive informed decision making that will result in happier employers and employees alike.

The closure of many businesses also provides fertile ground for the creation of new businesses, and some early data suggests that entrepreneurial activity has flourished over the course of the pandemic. Working with new business owners and entrepreneurs to help meet their talent needs and connect with any additional supports they may need will be important in helping these businesses keep their doors open.

4. **Continue to track and learn as the Santa Barbara County economy responds and recovers from the pandemic.** The recovery from the pandemic is only just beginning. While we can see most of the negative impacts from the COVID-19 economy, we do not have a lot of evidence to better understand how

industries, businesses, and households will respond and rebuild in the wake of the economic wreckage and the restructured employment landscape. Here are four questions we will want to track and continue to learn from over the next 6 to 12 months as Santa Barbara County recovers from the pandemic:

- a. **How will employment and entrepreneurship evolve in Santa Barbara’s Tourism, Hospitality, and Recreation industry?** Santa Barbara’s tourism and hospitality industry has, for some time, been one of the county’s largest employers and, as it evolves, it will have a considerable impact on the employment landscape. While the county is expected to see a considerable return and even growth in domestic leisure travelers, the international and business travelers are likely to be further delayed in returning to the region.
- b. **How much office work will return to the office and what does it mean for working, living, and commuting in Santa Barbara County?** Housing affordability continues to be a defining challenge for Santa Barbara County. The post-pandemic economy could provide an opportunity to begin to solve this challenge as more workers are able to work from home and office space is converted to residential living space.
- c. **How do Santa Barbara County’s high-wage industry clusters recover and expand in the post-pandemic economy?** High-wage industry clusters—like Information & Communication Technologies (ICT), Biotechnology & Biomedical Devices, and Defense, Aerospace & Transportation Manufacturing (DATM)—all provide average annual earnings above \$100,000 and have relatively high employment multipliers, meaning for every job they create in the county, more jobs are created to support it. These industry clusters, at the national level, all look ready to recover and grow, but tracking their recovery and growth in the county should be a workforce and economic development priority for Santa Barbara County.
- d. **How will new technologies, increased automation, and a volatile employment landscape change the demand for workers’ technical skills and career pathway opportunities?** The employment landscape in the last 14 months has changed more than it has during the ten years preceding it. These changes will need to be continually examined in Santa Barbara County as industries, businesses, and households respond to the post-pandemic economy, and we track what it means for the regional world of work.

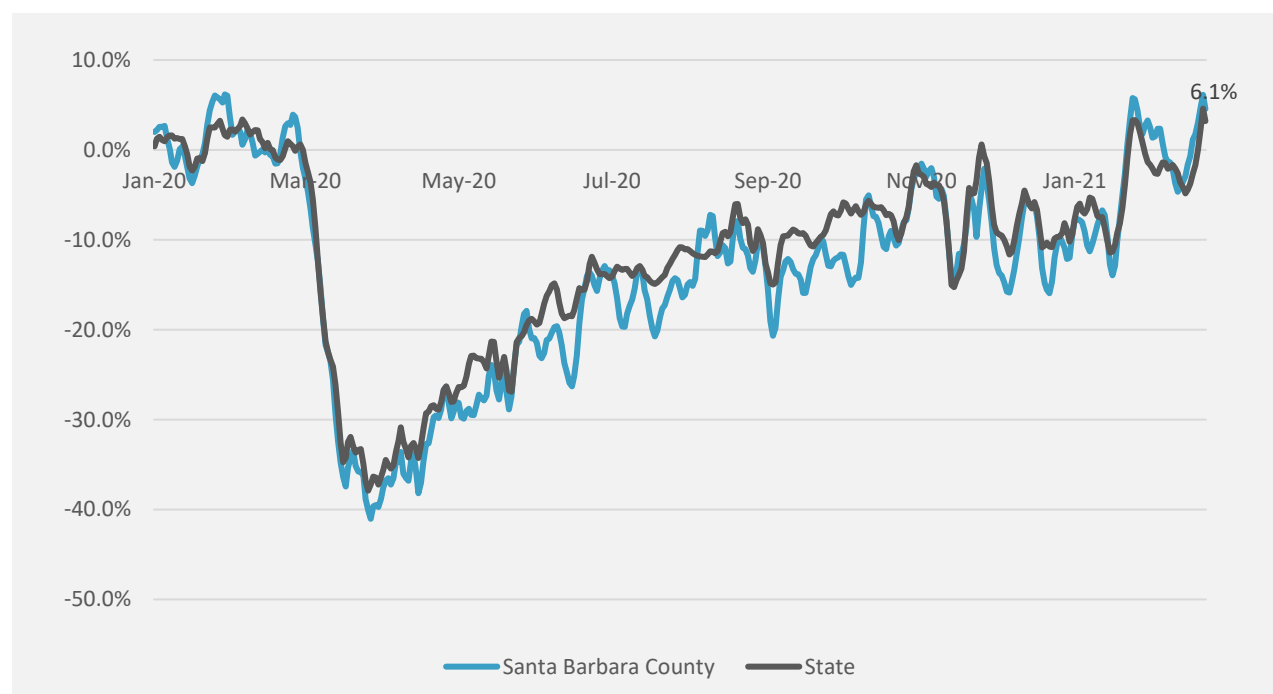
Business Impact

The COVID-19 pandemic and the accompanying public health measures have had unprecedented impacts on businesses and their workers. This section provides a range of metrics and datapoints that tracked the impacts of the pandemic across time. Examining these changes through 2020 and into early 2021 provide a detailed picture of the scale of impacts, the resiliency of businesses, and an early glimpse into the recovery ahead.

COVID-19 IMPACTS ON LOCAL BUSINESSES

A little less than a year after the first impacts of the pandemic were felt, consumer spending has returned to pre-pandemic levels. Consumer spending first returned surpassed pre-pandemic baseline levels in early February of 2021 and has again peaked over baseline levels in early March (Figure 1). Continued tracking of consumer spending will provide crucial insight into consumer confidence and financial stability. While the return of consumer spending is a welcomed normal, it is important to consider where this spending is taking place. An increasingly online world could leave brick-and-mortar retailers struggling long after consumer spending has returned.

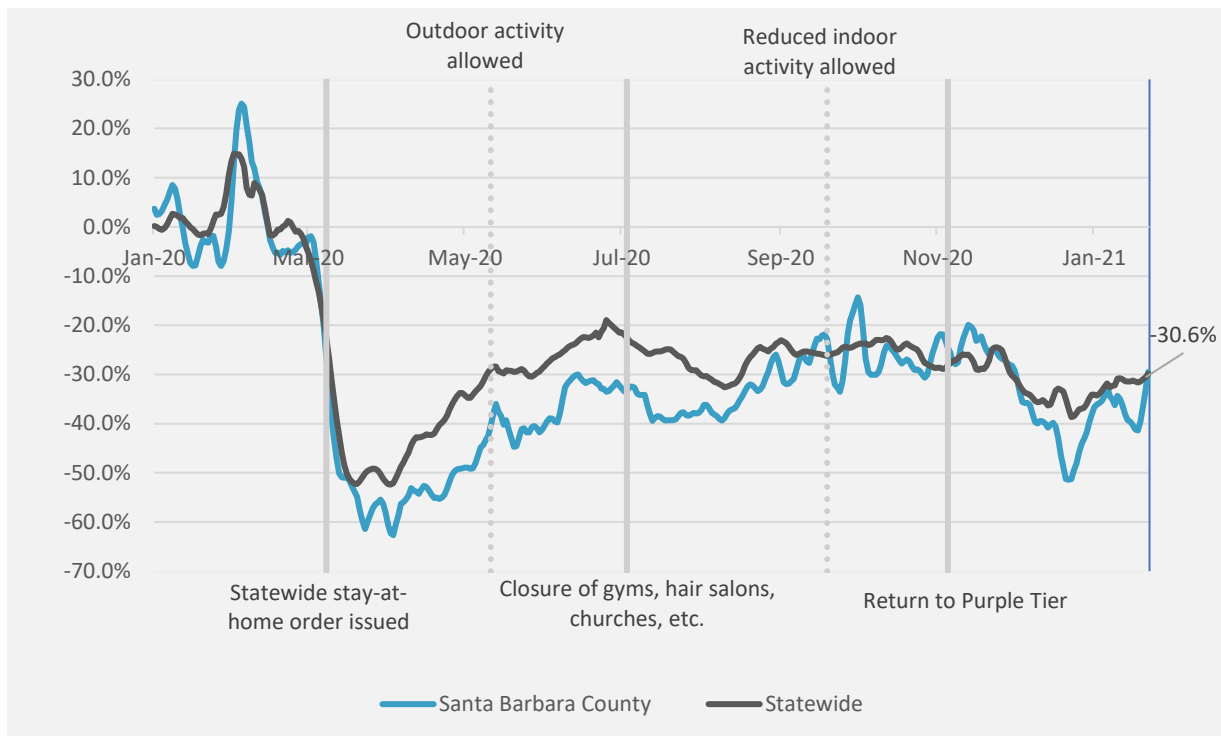
Figure 1. Change in Consumer Spending¹



Santa Barbara business revenues in February 2021 remain lower than pre-pandemic levels. Figure 2 highlights the change in revenues and the public health measures that likely impacted them. While business restrictions strongly coincide with respective increases and decreases in revenues, the gradual increase and decrease of trends suggest that case rates and the public's concern for safety were substantial factors in quelling local activity.

¹ "The Economic Impacts of COVID-19: Evidence from a New Public Database Built Using Private Sector Data", by Raj Chetty, John Friedman, Nathaniel Hendren, Michael Stepner, and the Opportunity Insights Team. November 2020. Available at: https://opportunityinsights.org/wp-content/uploads/2020/05/tracker_paper.pdf

Figure 2. Change in Business² Revenues in Santa Barbara County³

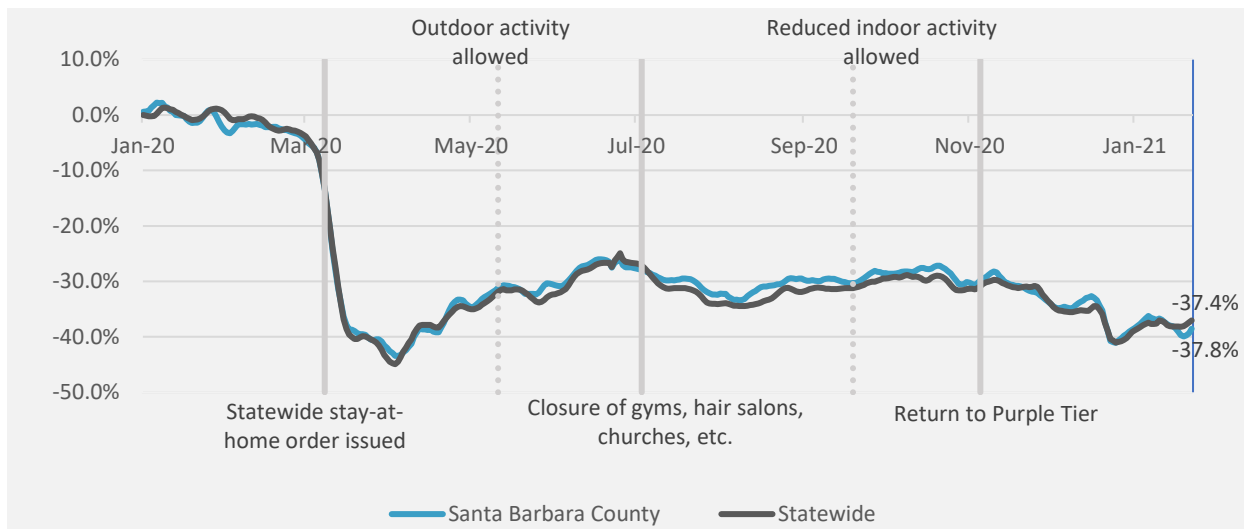


As revenues have remained suppressed, so has the number of open businesses in Santa Barbara County. More than one-third (38%) of businesses in the county remained closed as of early February 2021 (Figure 3). The longer that these businesses remain closed, the less likely they will be to re-open.

² This analysis uses the SBA definition of a small business and varies by industry. Generally speaking, these are firms with less than 1,200 employees or less than \$45 million in annual revenue, which account for a majority of firms in Santa Barbara County. For more information about this definition, please visit <https://www.sba.gov/document/support--table-size-standards>

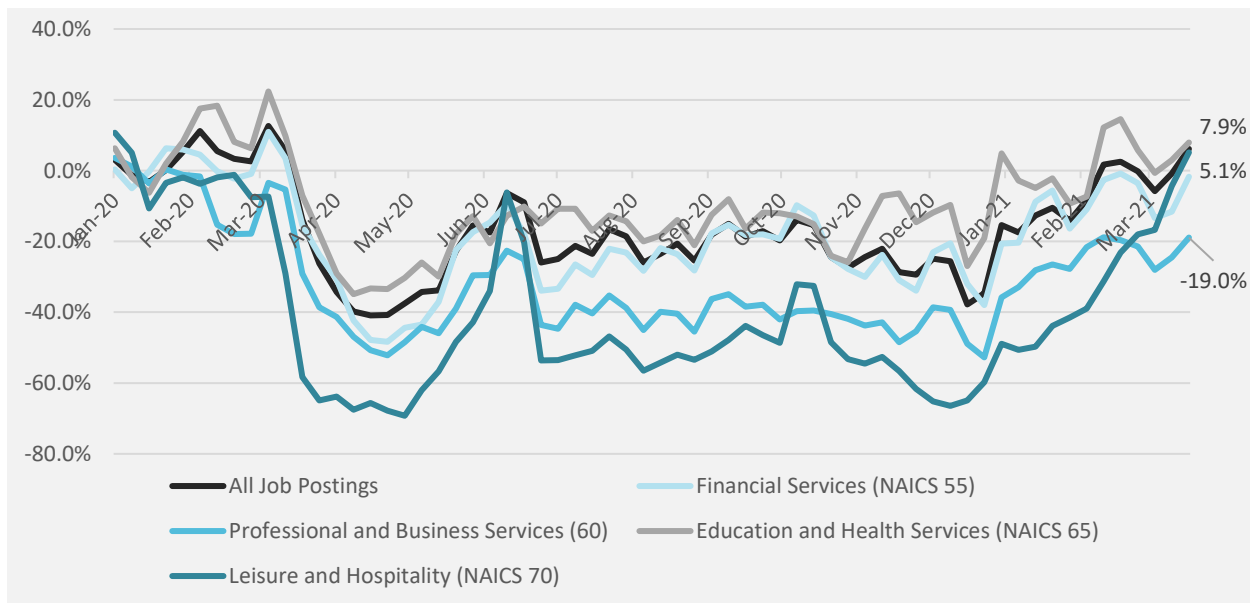
³ "Tracking the Recovery." Opportunity Insights.

Figure 3. Change in Open Businesses in Santa Barbara County⁴



Despite lower openings and revenues, hiring statewide has largely returned to pre-pandemic levels. This is notable because the economy heading into the pandemic was quite strong, and a return to prior levels of hiring suggests that economic optimism has returned. New job postings in the Leisure and Hospitality industries have largely returned to baseline rates, though hiring for Professional and Business Services remains subdued (Figure 4).

Figure 4. Change in Online Statewide Job Postings⁵



⁴ "Tracking the Recovery." Opportunity Insights.

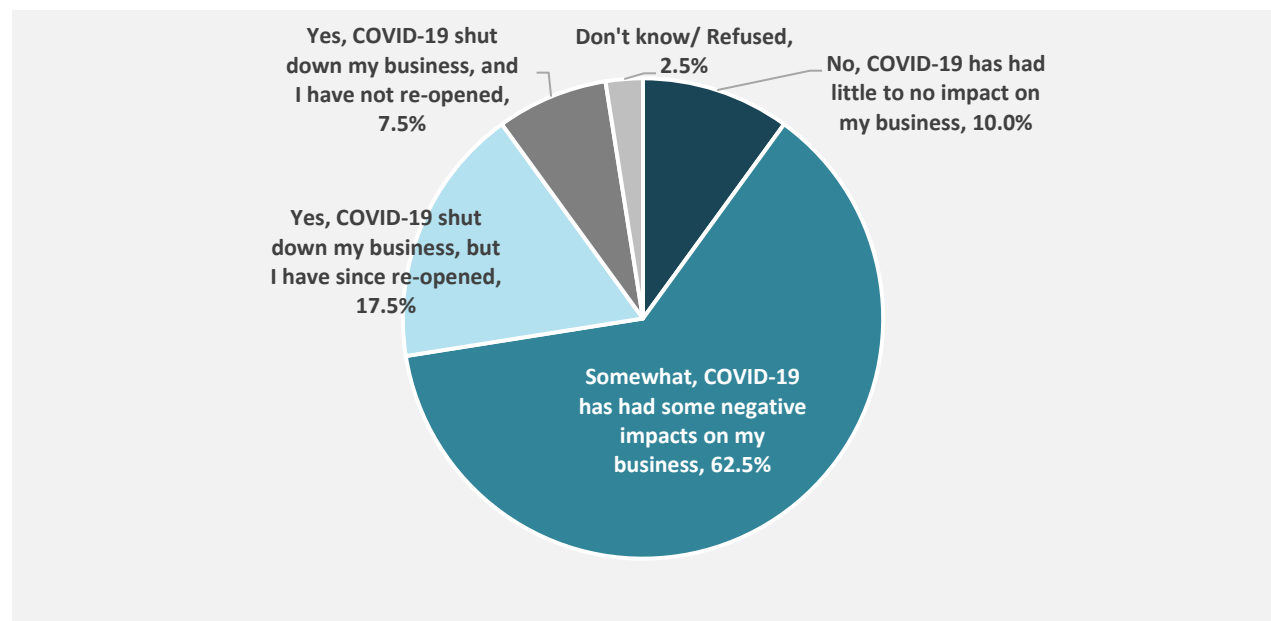
⁵ "Tracking the Recovery." Opportunity Insights.

IMPACTS ON NON-PROFITS, CHILDCARE, EDUCATION, AND HUMAN SERVICE PROVIDERS

The research team surveyed 40 non-profits, education, childcare, and human service providers, offering a snapshot of these businesses across Santa Barbara County. Eighty percent of these organizations are non-profits, and the remaining 20% work in childcare, education, and human services. In the interest of simplicity, these organizations will be referred to collectively as “non-profit organizations” throughout the report.

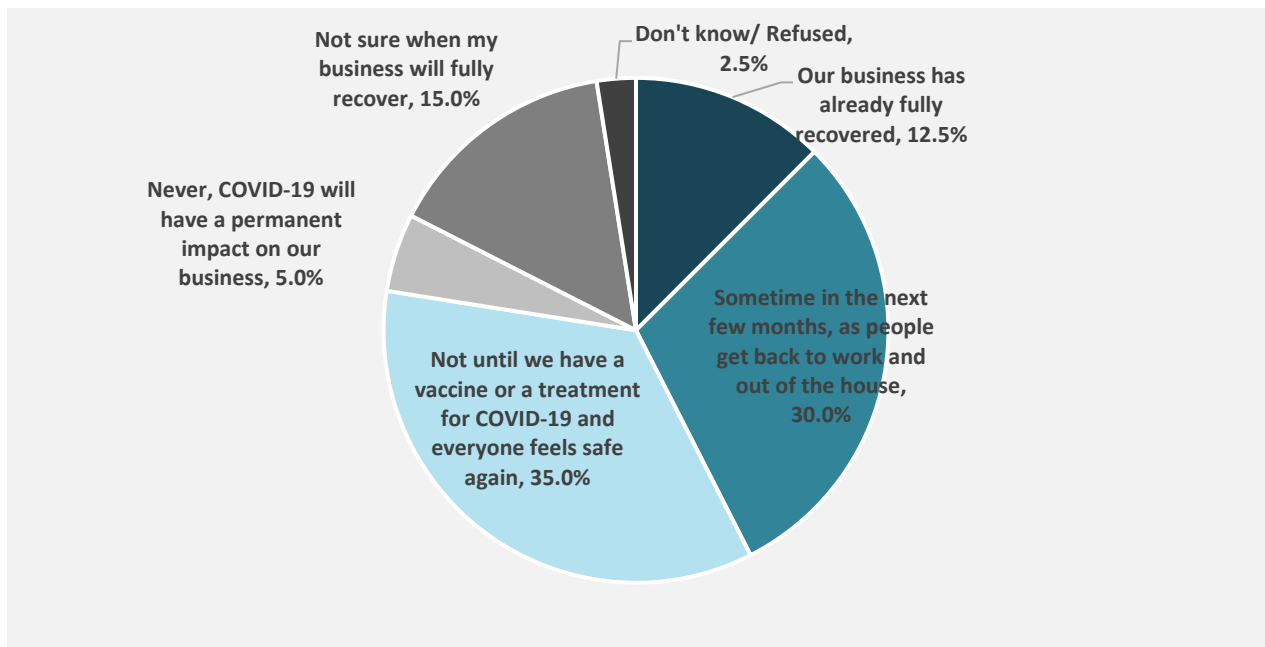
Most (63%) non-profit organizations reported moderate negative impacts from the pandemic. Fewer than one-in-five (18%) shut down temporarily but have since re-opened, and another 8% reported not re-opening since closing. One-in-ten organizations reported little to no impact on their operations (Figure 5).

Figure 5. Impacts of COVID-19 on Business



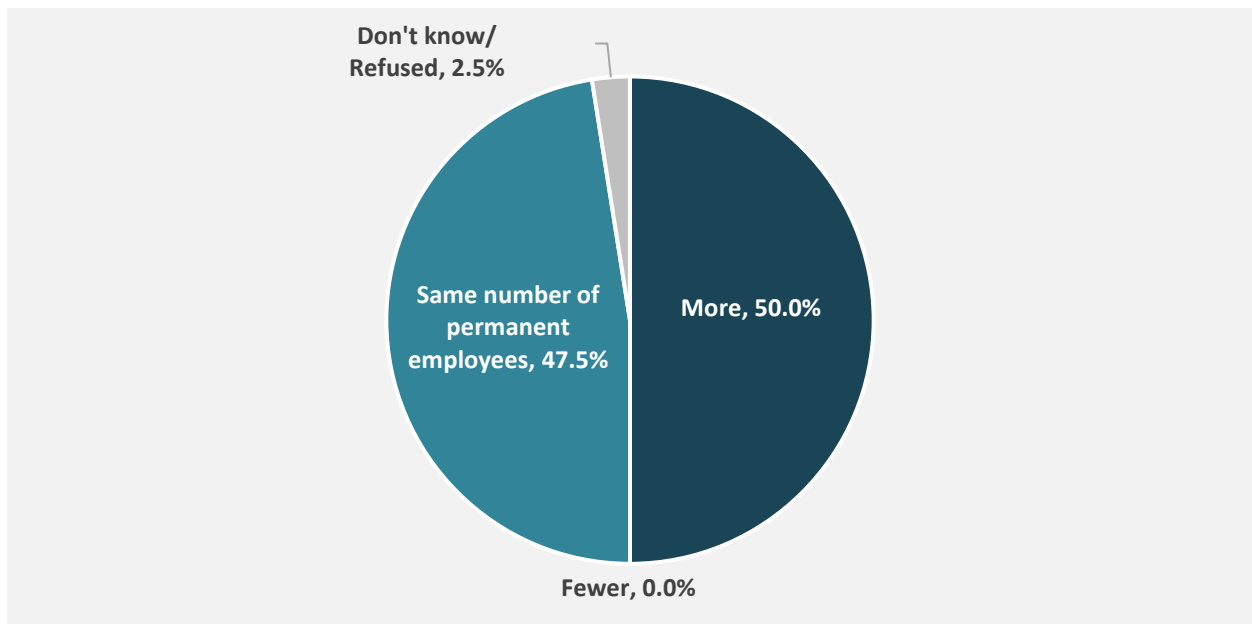
Nearly third (30%) of organizations expect to get back to normal in the next few months as people begin to feel more comfortable, and another 35% feel that this may be delayed until vaccinations are more widespread. Only 13% reported already fully recovering, while 15% remain unsure when their organization will fully recover (Figure 6).

Figure 6. Recovery Expectations



In line with trends observed among overall job postings, half of non-profit employers surveyed expected to onboard more staff in the coming 12 months. Another 48% expect to maintain the same number of employees, and no organizations expected to reduce headcount (Figure 7).

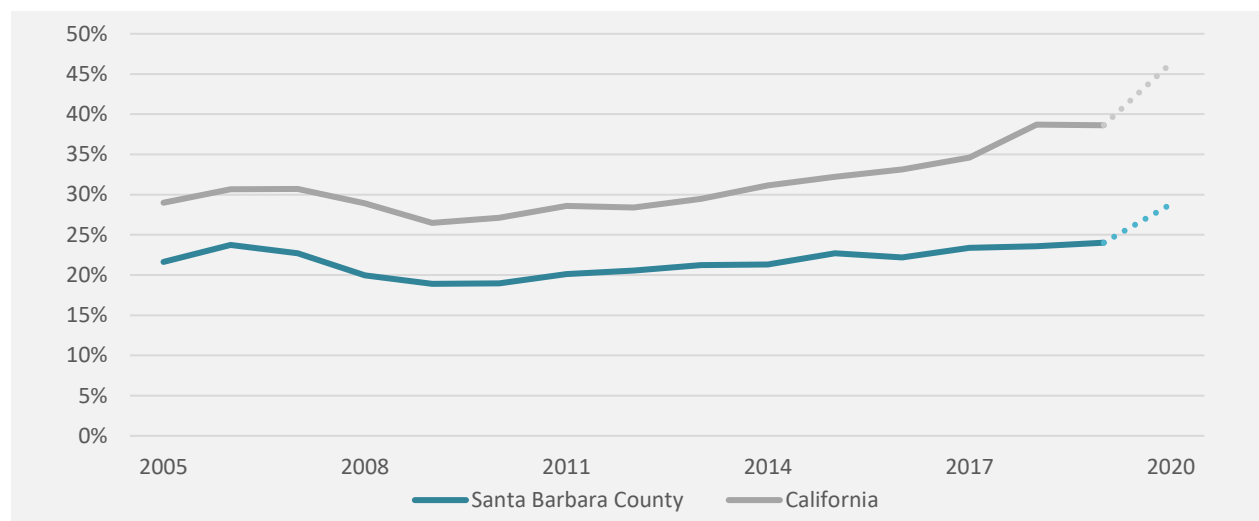
Figure 7. Expected Number of Employees 12 Months from Now



NEW BUSINESS AND VENTURE CAPITAL

In 2019, new business formations in Santa Barbara reached levels not seen since 2006. Importantly, early data suggest that new business formations statewide in 2020 far exceeded pre-pandemic levels. If Santa Barbara County continues to trend with the broader state as it historically has, the county will have also seen a substantial influx of new business formations (Figure 8). The business formations not only reflect economic optimism but help propel the economy into innovative and groundbreaking new spaces, attracting and onboarding new talent.

Figure 8. New Business Formation as a Share of Overall Business Establishments^{6 7}



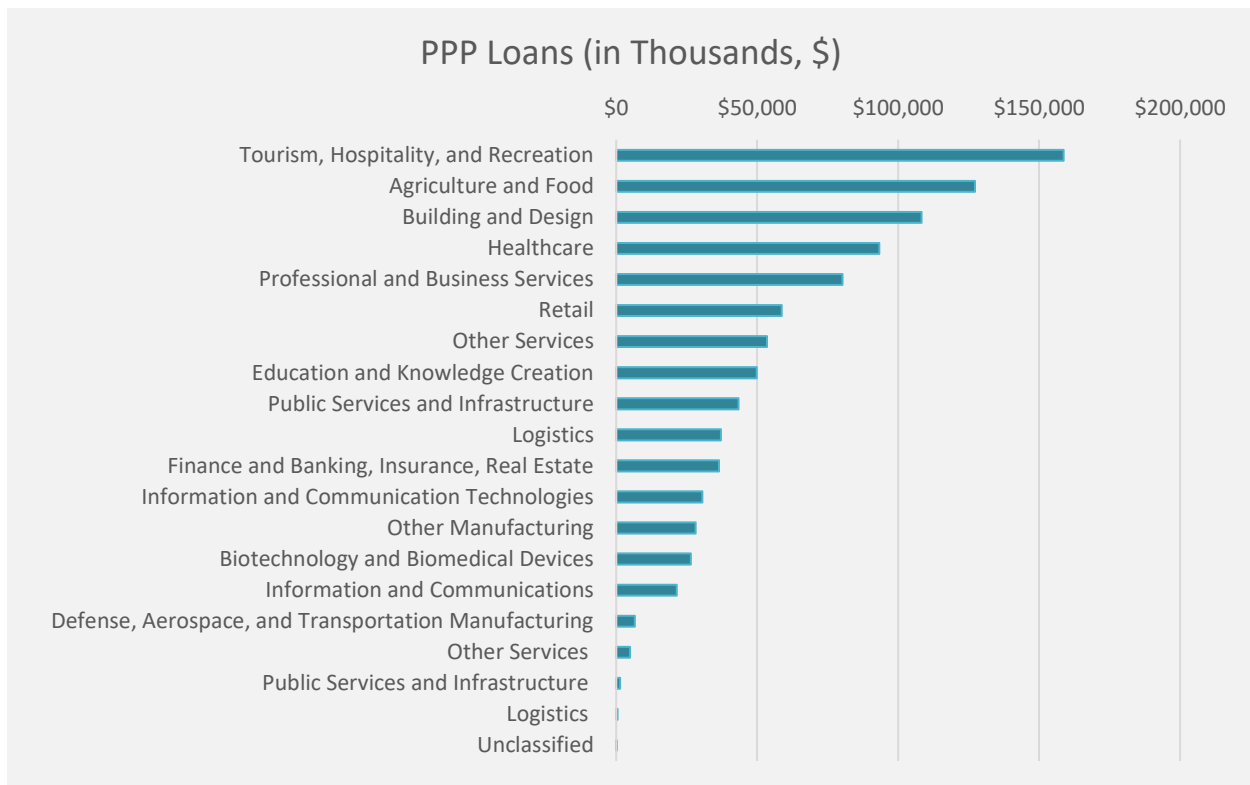
PAYCHECK PROTECTION PROGRAM

The Paycheck Protection Program (PPP) passed as a part of the COVID-Relief CARES Act disbursed \$678.7 billion across 7.3 million loans in the United States. About 8,100 businesses in Santa Barbara County received a PPP loan during the first round, amounting to \$967 million in loans. The 8,120 businesses reported employing nearly 90,700 workers, or about 43% of the total workforce in the county. Businesses in Tourism, Hospitality, and Recreation and Agriculture and Food Received the greatest proportion of funds, receiving more than \$127 million in loans, each (Figure 9).

⁶ Data from U.S. Census Bureau Business Formation Statistics Experimental Data.

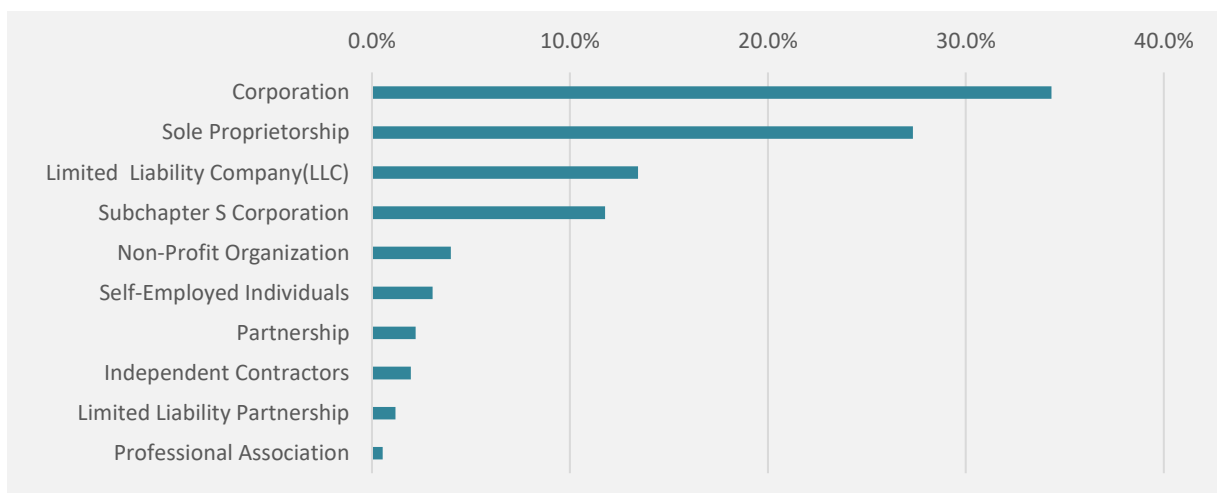
⁷ 2020 and 2021 Projection are based on annual statewide estimates. These projections present the possible rate of new business formations at the local level but were developed using preliminary statewide data and local base rates.

Figure 9. Paycheck Protection Program (PPP) Loans by Industry Cluster (First Round)⁸



Corporations and Sole Proprietorships accounted for 62% of all first-round PPP loans disbursed in Santa Barbara County. S-Corporations and Limited Liability Companies (LLCs) were also common loan recipients (Figure 10).

Figure 10. Number of PPP Loans by Business Type⁹

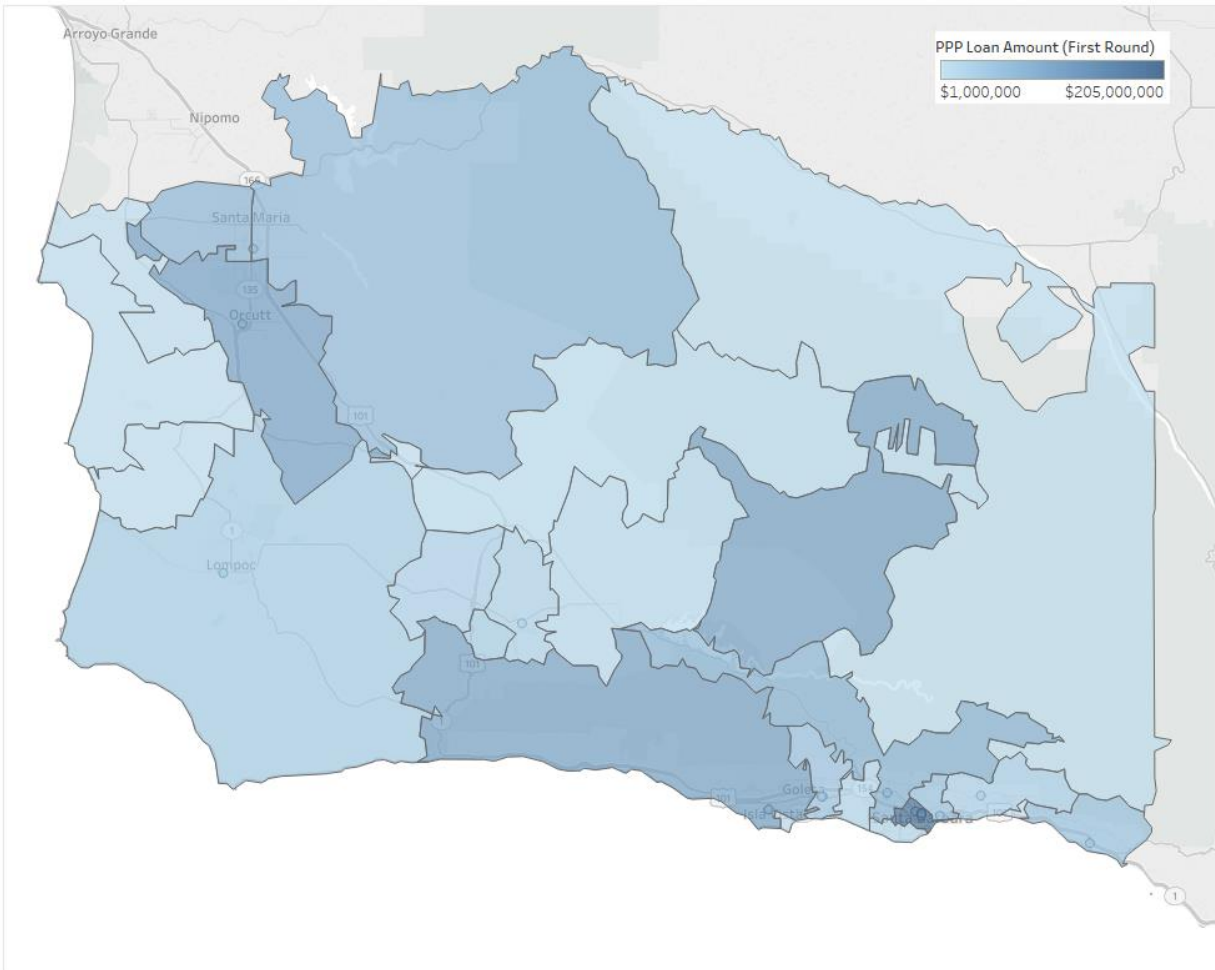


⁸ Data from the U.S. Small Business Administration

⁹ Top Ten Business Types reported. Data from U.S. Small Business Administration.

The zip codes that received the greatest amounts of PPP loans in the first round were 93101 (city of Santa Barbara), 93455 (Orcutt), and 93117 (Isla Vista). Zip codes inland and on the western part of the county tended to receive less funding in aggregate (Figure 11).

Figure 11. Total Amount of PPP Loans Received by Zip Code (First Round)¹⁰

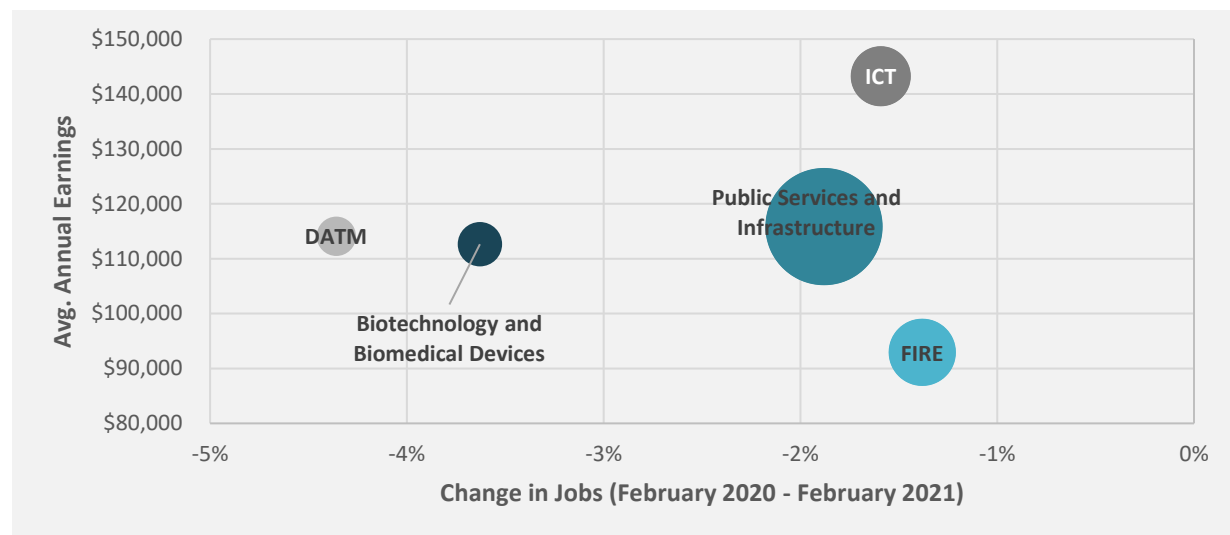


¹⁰ U.S. Small Business Administration

Industry Cluster Analysis

The COVID-19 pandemic has had different impacts on different industry clusters within Santa Barbara County. Generally speaking, industry clusters with the highest-average earnings experienced the lowest declines in employment. Figure 12 highlights these highest-earning industry clusters. In contrast, the lowest-paying industry clusters tended to bear the brunt of the economic devastation, particularly among industries like Tourism, Hospitality, and Recreation (Figure 14).

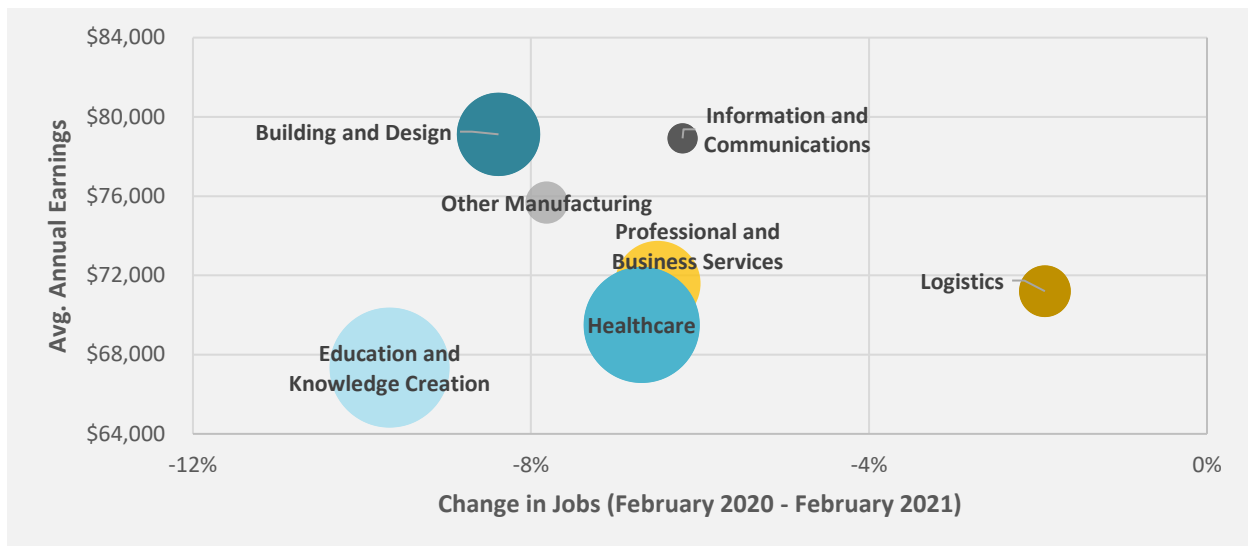
Figure 12. Highest-Earning Industry Clusters¹¹



Mid-earning industry clusters have generally seen more severe losses than the highest-earning industry clusters but lower losses than the lowest-earning industry clusters. Education and Knowledge Creation and Building and Design saw employment decline 10% and 8%, respectively, between February 2020 and February 2021. Even employment in Healthcare has seen layoffs as medical providers tighten budgets following the decline in elective surgeries (Figure 13). Many of these industry clusters are primed to spring back once COVID-19 subsides and more typical activities and schedules can resume.

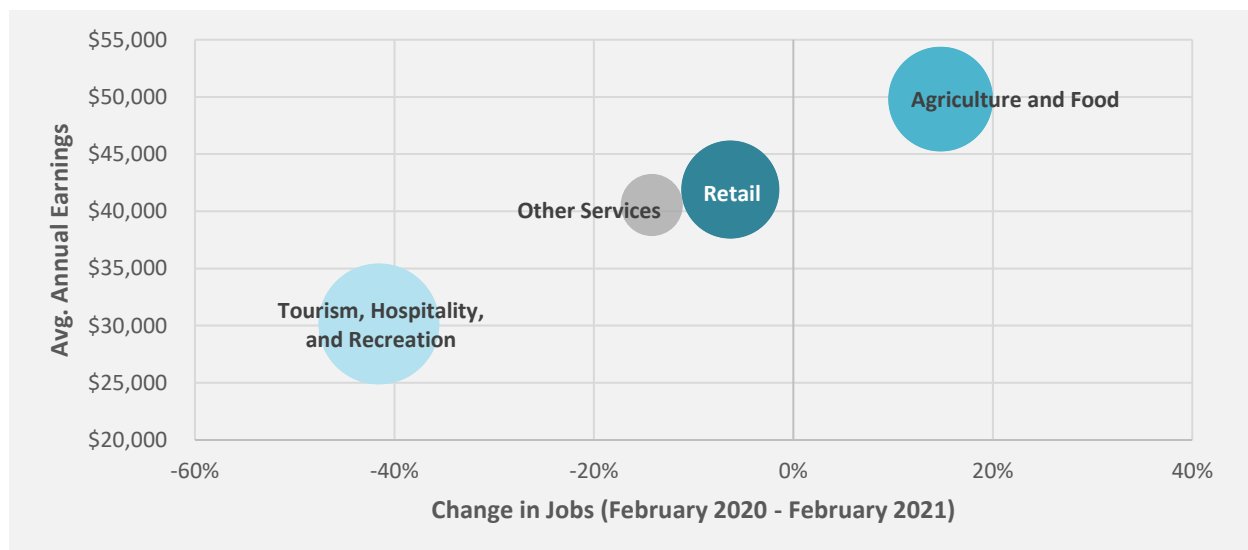
¹¹ Emsi 2020.4

Figure 13. Mid-Earning Industry Clusters¹²



The industry clusters with the lowest average earnings have generally seen the most volatility. Tourism, Hospitality, and Recreation has seen employment decline by 42%. Industry clusters like Retail and Other Services (which includes businesses such as nail and hair salons) have seen notable declines in employment as well (Figure 14), though different industries within this cluster have felt differing impacts. For example, nail salons have been hit particularly hard while home improvement retailers saw record sales.

Figure 14. Lowest-Earning Industry Clusters¹³



¹² Emsi 2020.4

¹³ Emsi 2020.4

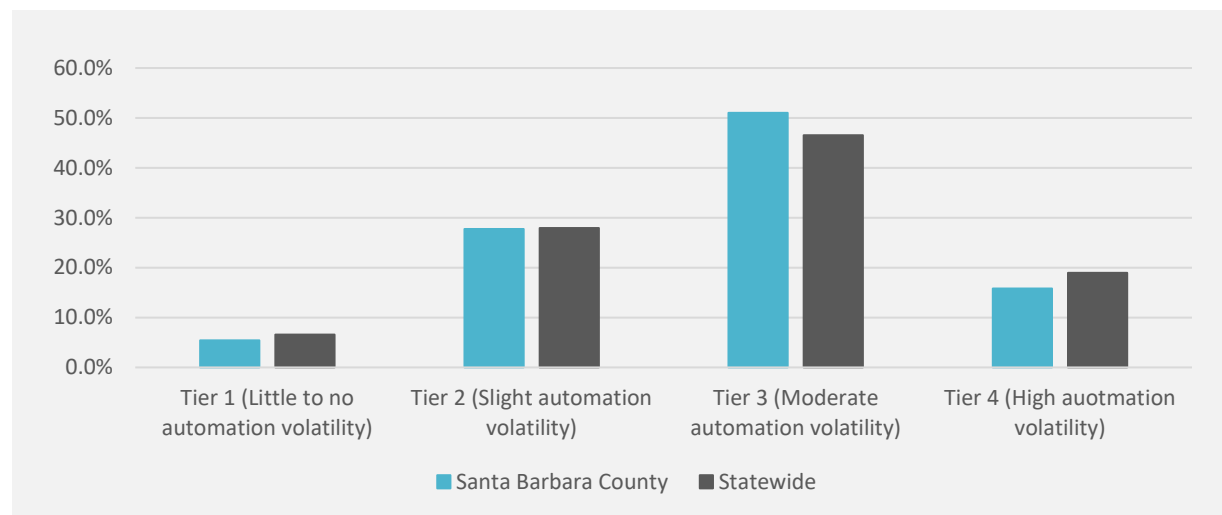
JOB VOLATILITY

BW Research has developed a job volatility index that ranks occupations based on the share of their skills and abilities that can be replaced by modern technology. To do this, the research team examined O*NET data that contains occupation-level survey data on 26 different skills. These skills were examined on their relative importance to the job and their complexity. The scores for each of these skills were then aggregated within each occupation, resulting in a metric that demonstrates the relative risk an occupation has of change due to technological advancement.

Tier 1 Automation Volatility	Tier 2 Automation Volatility	Tier 3 Automation Volatility	Tier 4 Automation Volatility
<p>Tier 1 occupations have a very low share of activities that can be replaced or heavily augmented by technology within five years. These occupations include Coaches and Scouts, Surgeons, and Chief Executives.</p>	<p>Tier 2 occupations have some tasks that can be automated, though automation will likely expand these roles rather than replace them. These occupations include Pest Control Workers, Graphic Designers, and Energy Auditors.</p>	<p>Tier 3 occupations have a moderate share of work that can be replaced by technology. These occupations include Landscaping and Groundskeeping Workers, Dishwashers, and Travel Agents.</p>	<p>Tier 4 occupations are the most at risk of automation. A large share of work activities can be replaced or heavily augmented by technology within five years. These occupations include Slaughterers and Meat Packers, and Sewing Machine Operators.</p>

Santa Barbara County has a greater share of workers that are at moderate risk of volatility due to automation than the state. Challenges finding workers and public health measures have led employers to increasingly consider automation of tasks and roles. This could mean that workers return to jobs that have changed requirements or skillsets. Roughly 16% of workers in Santa Barbara County have jobs that are at the greatest risk of automation-related volatility (Figure 15).

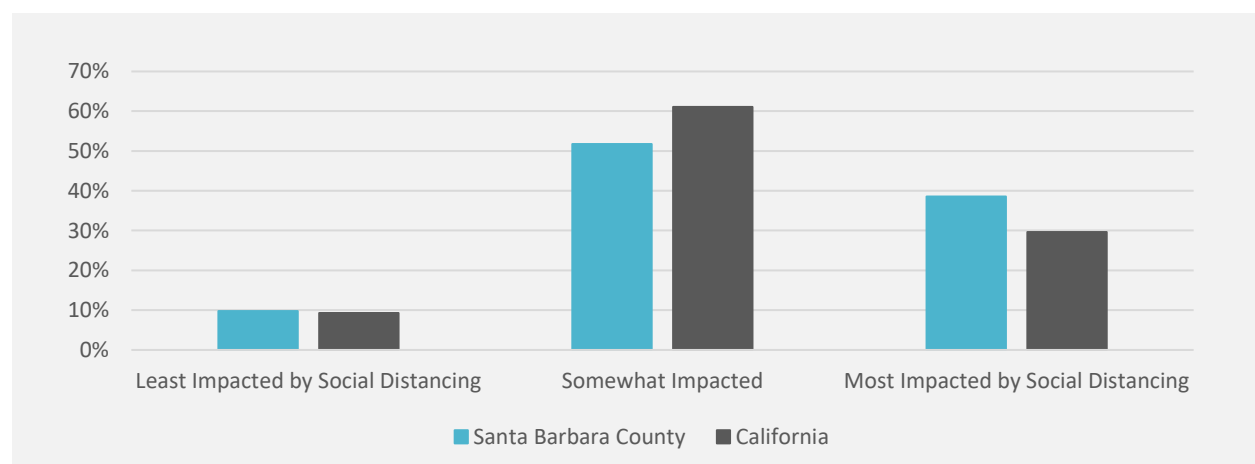
Figure 15. Job Volatility Due to Automatability of Tasks



BW Research developed an occupation-level volatility index based on an occupation's physical proximity score in O*NET occupation data. This analysis classifies jobs into three tiers. Occupations where physical proximity to others is most important are classified as Tier 3. Tier 3 occupations, including Waitresses and Teachers, have likely seen notable volatility or disruption as a consequence of social distancing and public health mandates. Occupations with middling human-proximity needs, such as Advertising Agents and Real Estate Agents, needs are classified as Tier 2 and have likely seen some volatility and disruption but remain largely unchanged. Tier 1 jobs are occupations, ranging from Graphic Designers to Loggers, with the lowest need for physical proximity to others. These jobs have been least affected by social distancing requirements.

Nearly four-in-ten workers before the pandemic were employed in jobs that fall under the category that is most impacted by social distancing requirements (Figure 16). While suggests that these workers were particularly challenged by the pandemic in the short term, these roles may more quickly rebound as the virus recedes in prevalence and people feel safe.

Figure 16. Job Volatility Due to Social Distancing Requirements



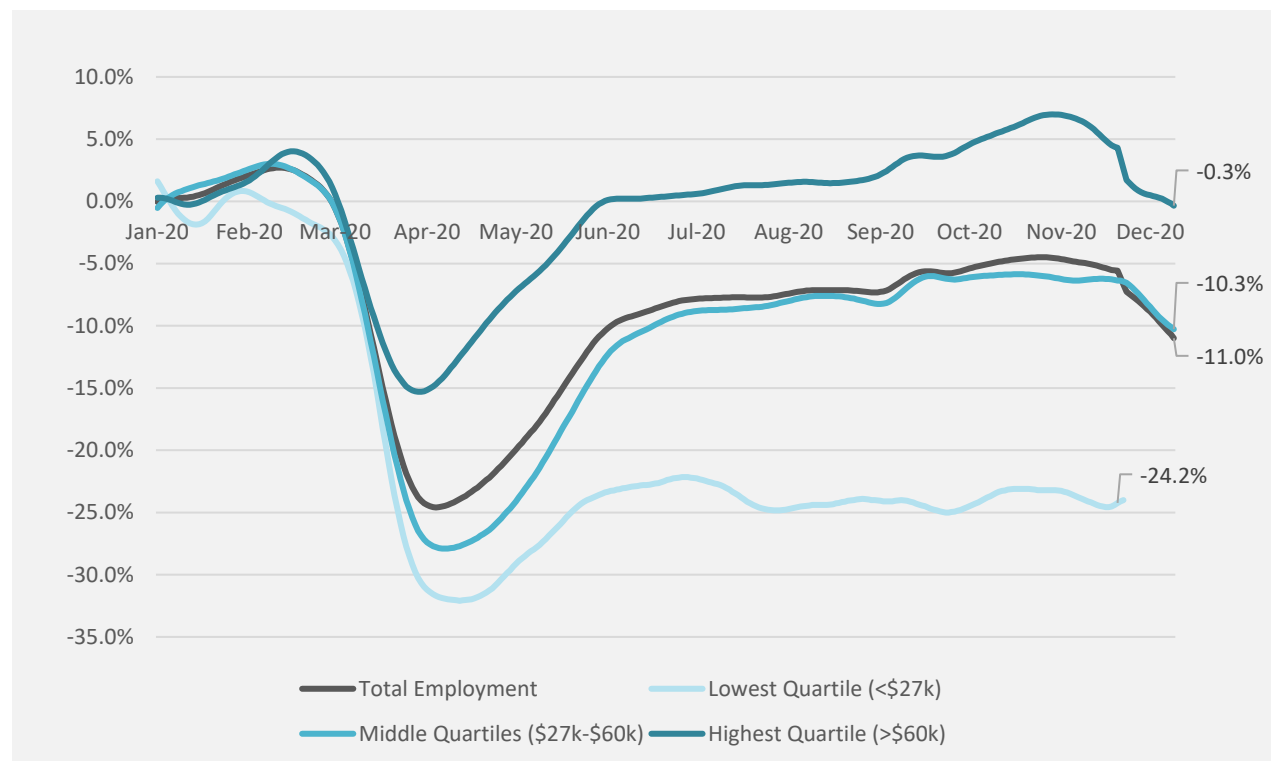
Employment Analysis

The employment landscape has changed drastically over the course of the pandemic and will likely continue to see significant changes as the recovery continues. This section highlights several datapoints that provide detail into specific elements of the labor force. Continuing to track these metrics will help decisionmakers better understand the dynamics of the recovery.

COVID-19 CHANGES IN EMPLOYMENT

One-in-four of the lowest-earning jobs in Santa Barbara County have yet to return. Workers in the lowest-earning quartile (those earning less than \$27,000 per year) have yet to see any meaningful recovery while jobs in the highest-earning quartile (those making more than \$60,000 per year) started to increase from pre-pandemic levels in early summer of 2020 (Figure 17). Jobs among the two median quartiles of earnings began to decline again during December 2020. As other indicators have since moved in a positive direction, it is anticipated that these rates will have returned to an upward trend in spring of 2021.

Figure 17. Change in Employment by Income Quartiles¹⁴

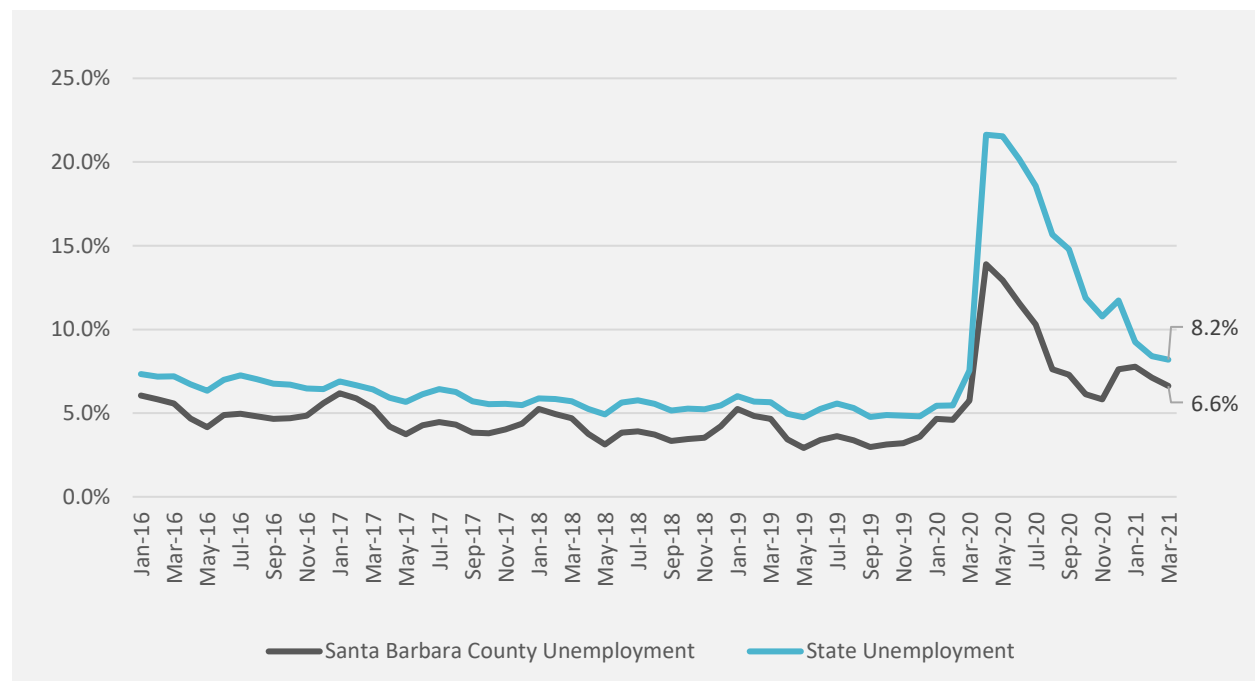


¹⁴ "Tracking the Recovery." Opportunity Insights.

Displaced workers may be looking for a change. About one quarter (24%) of respondents currently out of work but looking for a new job in the near future reported they'd look for jobs that were not similar to the ones they most recently held. This suggests substantial turnover in the labor market, as workers have reevaluated their jobs and are seeking new opportunities.

Though unemployment in Santa Barbara County has fallen substantially from its peak in May 2020, unemployment has remained high (6.6%) as of March 2021. It is also notable that the Santa Barbara County unemployment rate has trended lower than the statewide average, but the two have recently become closer to converging, suggesting that the recovery in Santa Barbara County may be slowing relative to the statewide recovery (Figure 18).

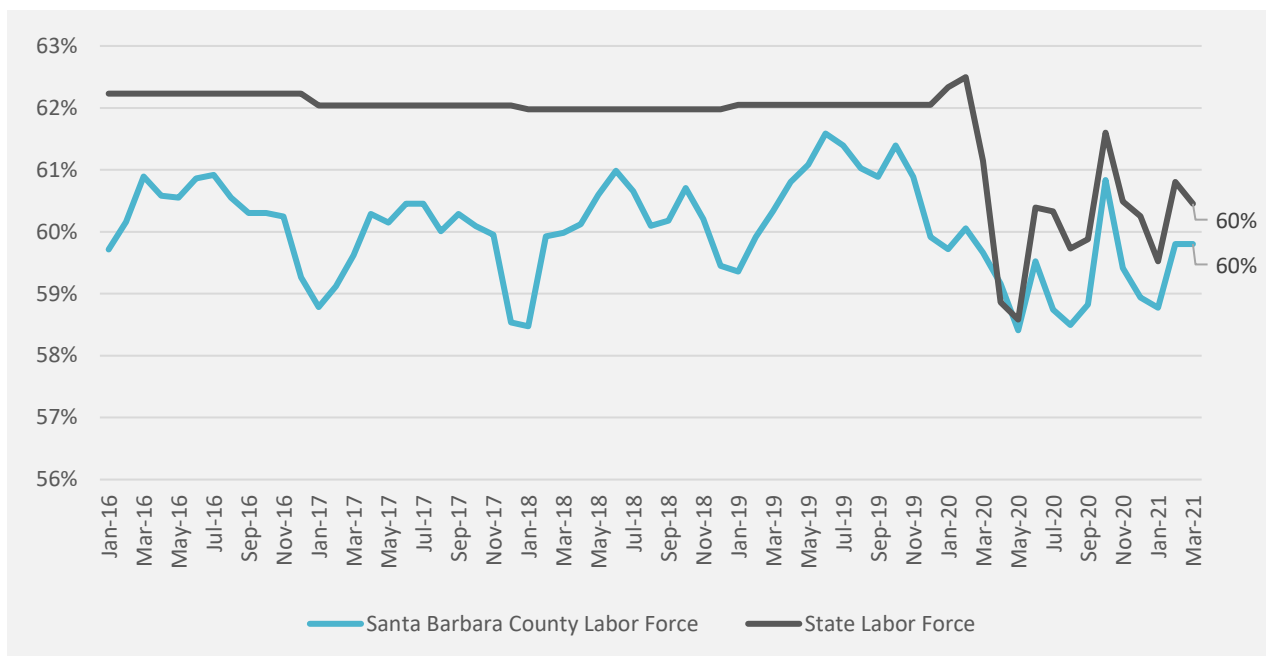
Figure 18. Unemployment Rate (2016-2020)¹⁵



The labor force participation rate in Santa Barbara County has fallen over the course of the pandemic and remains lower than the statewide average. Thousands of workers in the county have left the workforce (Figure 19). Lower labor force participation may suggest that workers are increasingly unable, discouraged, or uninterested in looking for work. Evidence from the Great Recession highlights that these discouraged workers are among the hardest to get to re-enter the workforce.

¹⁵ California Employment Development Department

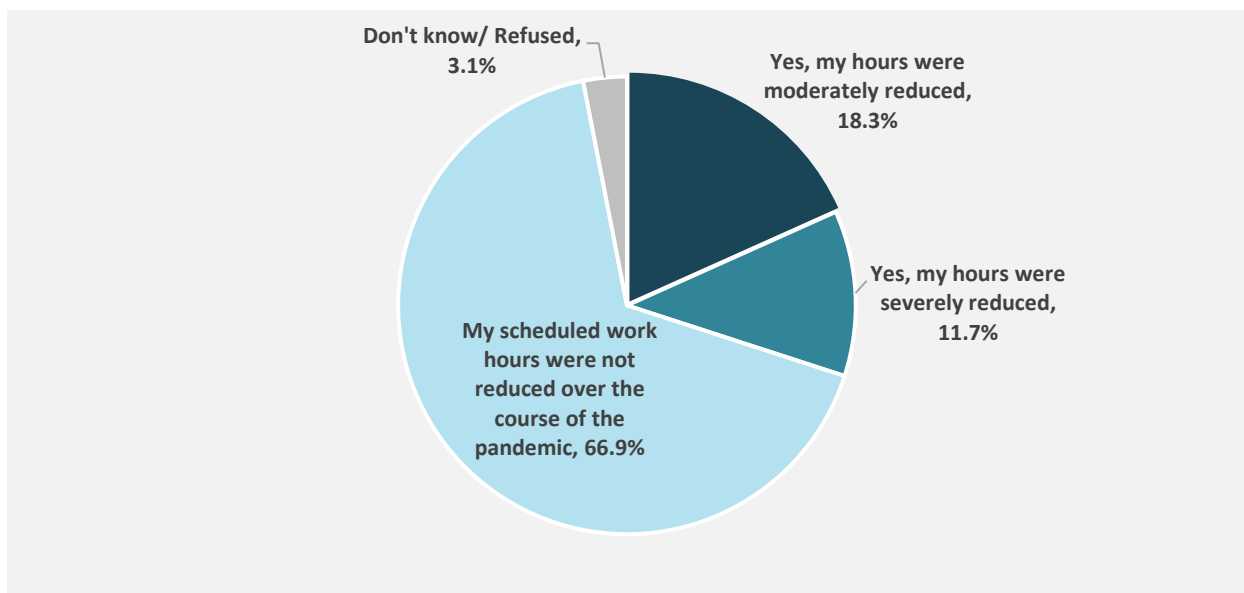
Figure 19. Change in Labor Force Participation¹⁶



COVID-19 HOUSEHOLD CHANGES

Of those currently working, most (67%) respondents did not see a reduction in their work hours over the course of the pandemic. Nearly one-in-five (18%) saw their hours moderately reduced, and another one-in-ten (12%) saw their hours severely reduced (Figure 20).

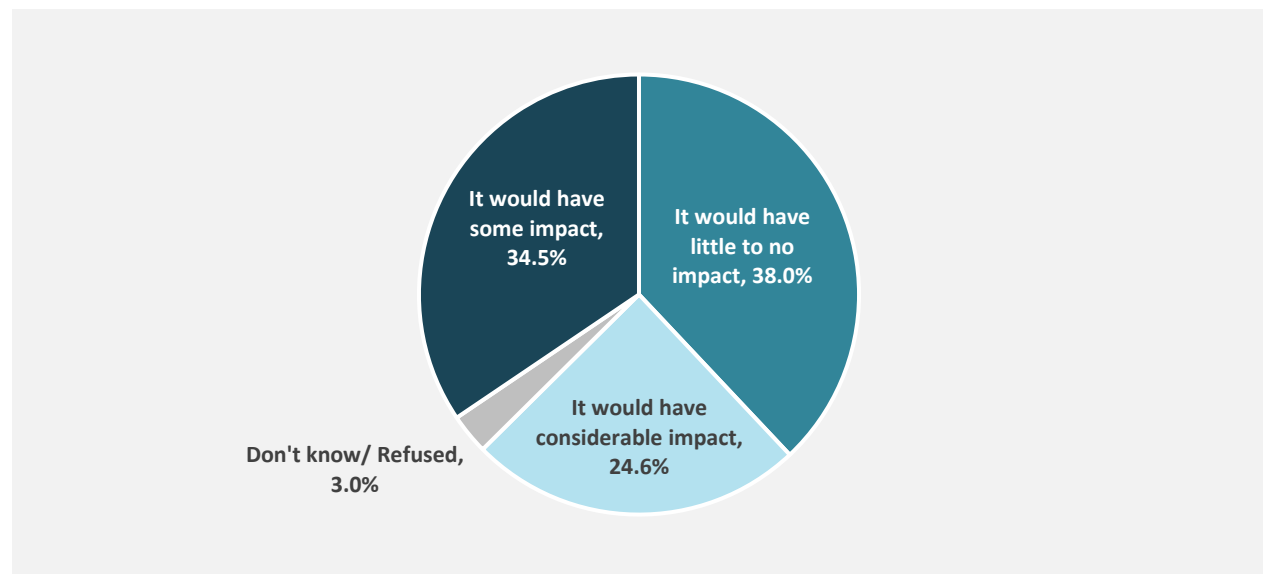
Figure 20. Changes to Working Hours Due to the Pandemic



¹⁶ California Employment Development Department

Sixty percent of respondents reported that at least one person in their household received stimulus checks as part of the CARES Act. To consider the relative impact of these stimulus checks, the survey asked what the impact of a surprise \$500 expense would have on their household. Roughly a third (34%) of respondents stated that an unexpected \$500 expenditure would have ‘some impact.’ Another quarter (25%) of respondents stated that it would have a considerable impact. Additionally, a third (33%) of respondents reported delaying or deferring paying expenses over the past 12 months (over the course of the pandemic). These figures highlight the substantial impact that the stimulus payments likely had on household finances.

Figure 21. Impact of an Unexpected \$500 Household Expenditure



THE IMPACTS OF CHILDCARE

More than three-quarters (79%) of households with children requiring adult supervision had an adult take on additional childcare responsibilities over the course of the pandemic. These adults were overwhelmingly women (75%) (Figure 22). These parents and guardians also faced substantial impacts to their ability to work; four-in-ten (42%) respondents reported altering their work schedule, 13% reduced their working hours, and a quarter (25%) left their job altogether (Figure 23). Perhaps most damaging is that these changes have been lasting. More than half (56%) of those who faced work disruptions due to childcare needs are still dealing with these disruptions (Figure 24). These survey findings suggest that additional childcare responsibilities have had substantial impacts on the county’s labor market, resulting in workers leaving or diminishing participation in the labor force, with many yet to return.

Figure 22. Gender of Adult Primarily Responsible for Additional Childcare Duties

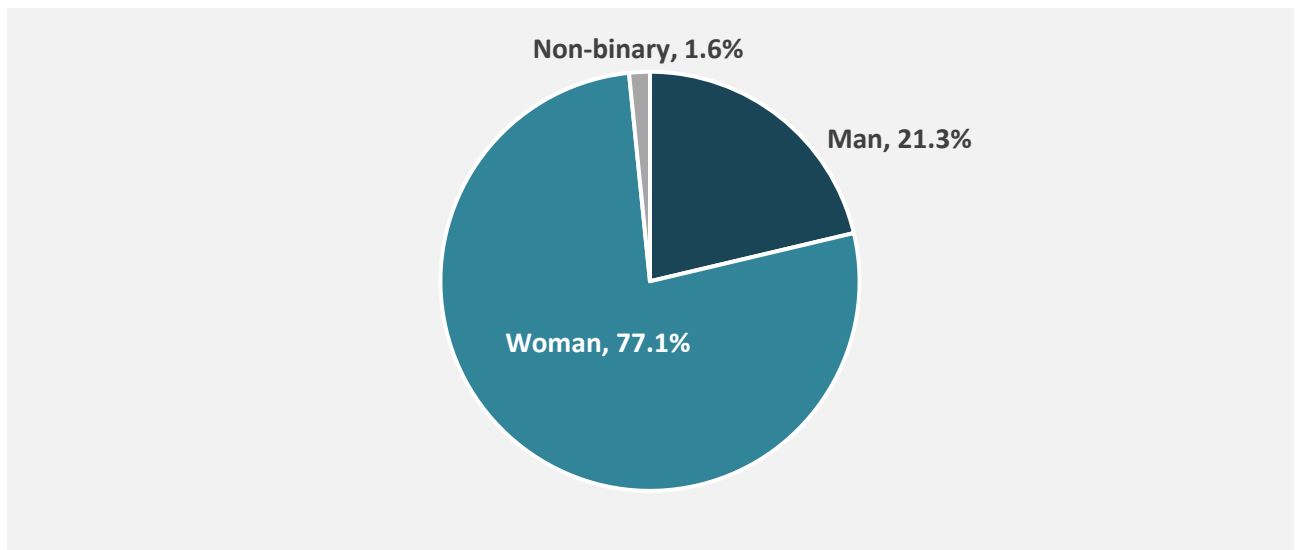


Figure 23. Impact to Adult's Work Schedule or Ability to Work

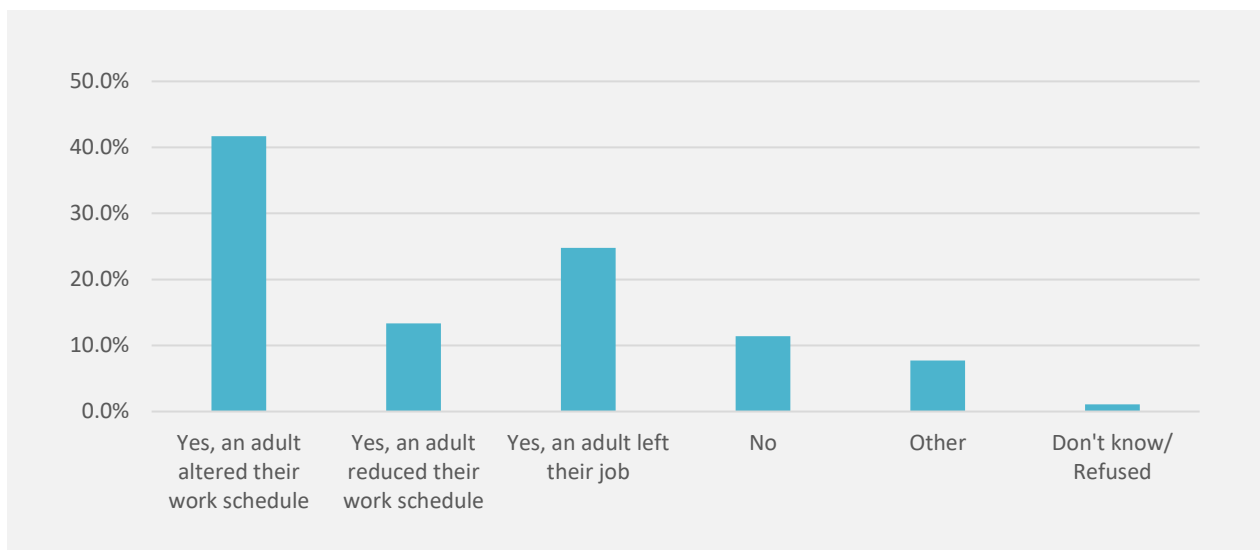
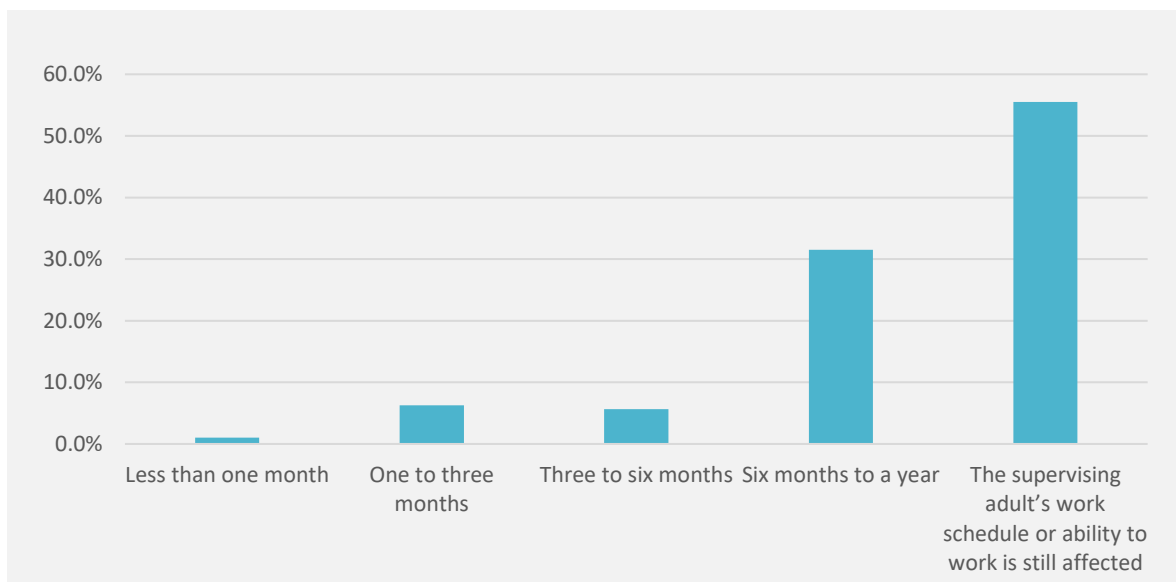


Figure 24. Duration of Childcare-Related Changes to Work Schedules and Ability to Work



Access to childcare and safety concerns were likely exacerbating factors for the increased child-related responsibilities of parents and guardians. One quarter (24%) of respondents with children requiring adult supervision reported they did not have access to childcare during the pandemic, and 53% reported they were not interested in childcare (Figure 25). Safety concerns may have played a role in lack of interest, as more than half (55%) of respondents stated that they had concerns related to COVID-19 and childcare. Another third (31%) reported a lack of affordability of childcare (Figure 26).

Figure 25. Access to Childcare During the Pandemic

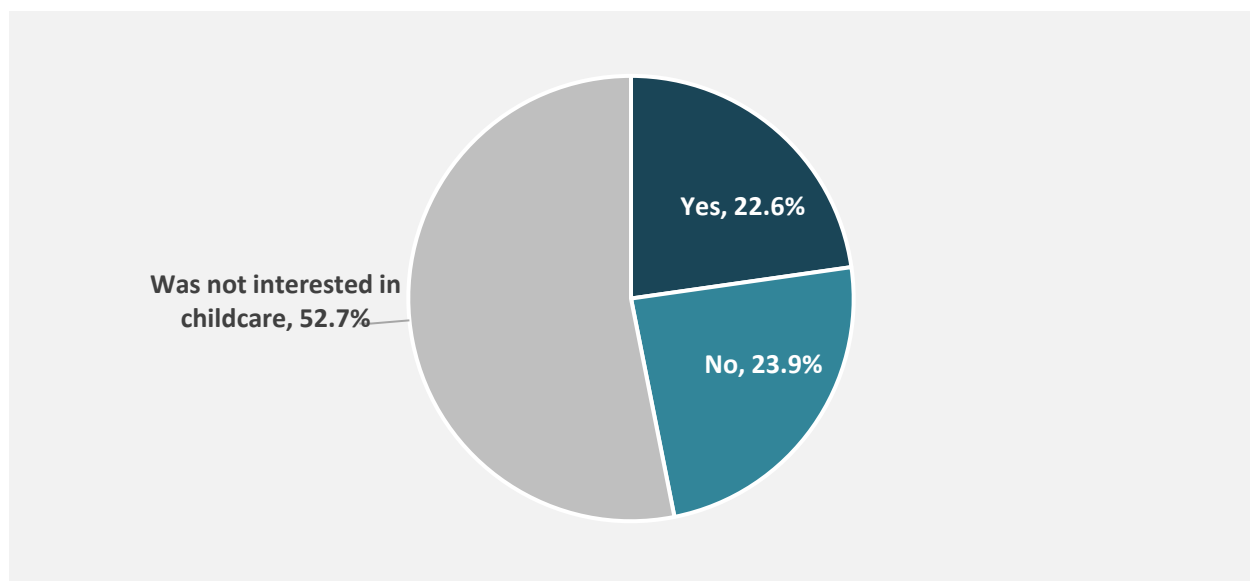
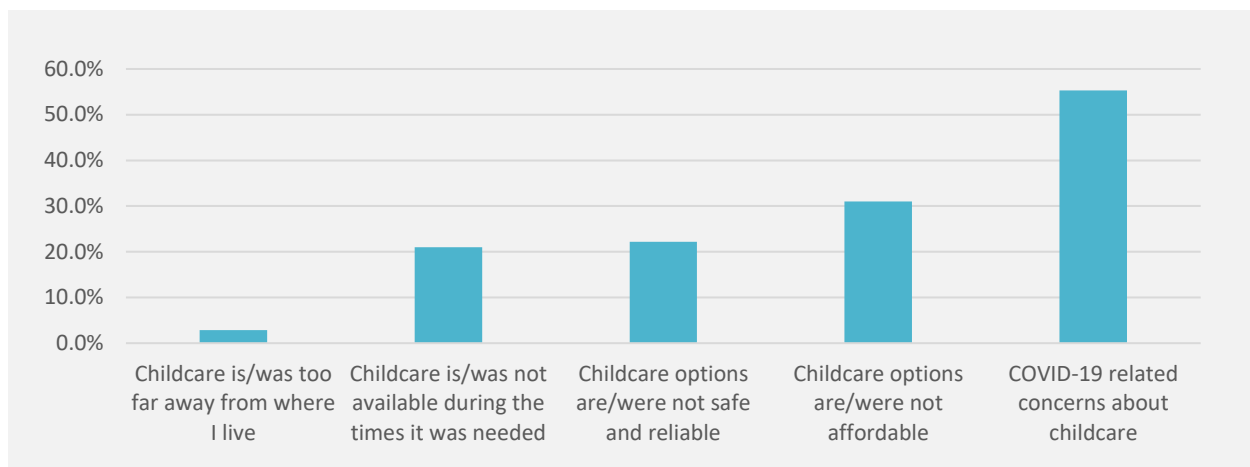


Figure 26. Key Challenges When Considering Childcare During the Pandemic



Satisfaction with childcare in communities is relatively low. Only four-in-ten adults with children requiring supervision reported they were at least ‘somewhat satisfied’ with the affordability of childcare in their community, and only 42% reported satisfaction with the number of childcare options. Respondents had more positive perceptions of the quality of childcare and the distance to childcare in their communities, though only 54% and 51% of respondents reported being at least ‘somewhat satisfied’ with these aspects, respectively (Figure 27). On average, respondents in the South sub-region of the county tended to have higher rates of strong satisfaction regarding different aspects of childcare. Residents in the North sub-region tended to report the lowest satisfaction rates, though Central sub-region respondents seem particularly unhappy with the affordability and number of childcare options in their community (Figure 28).

Figure 27. Satisfaction with Childcare in the Community

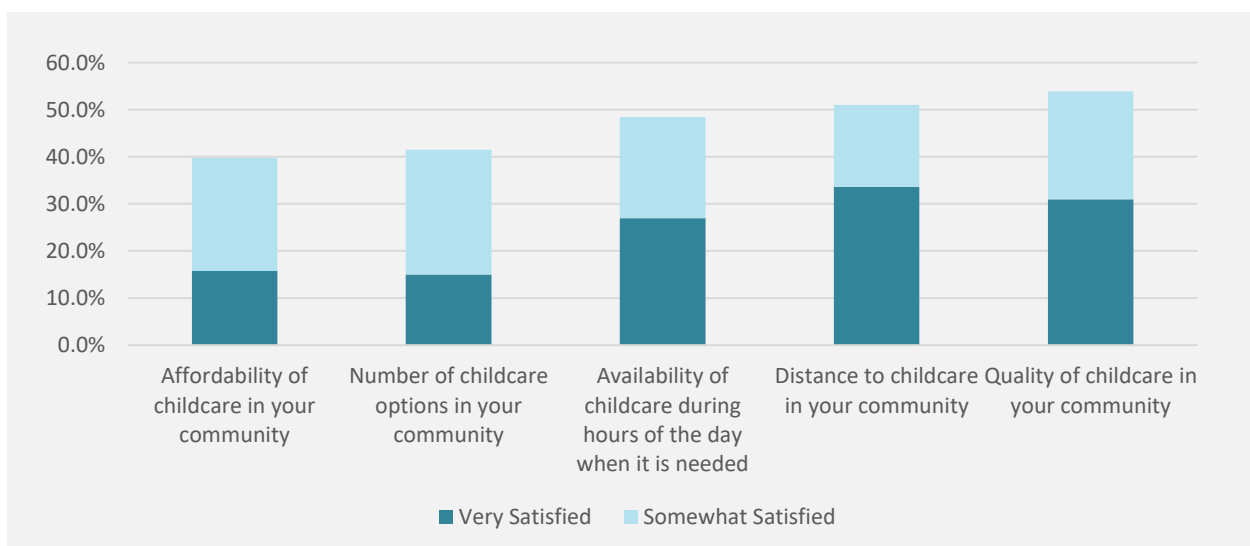
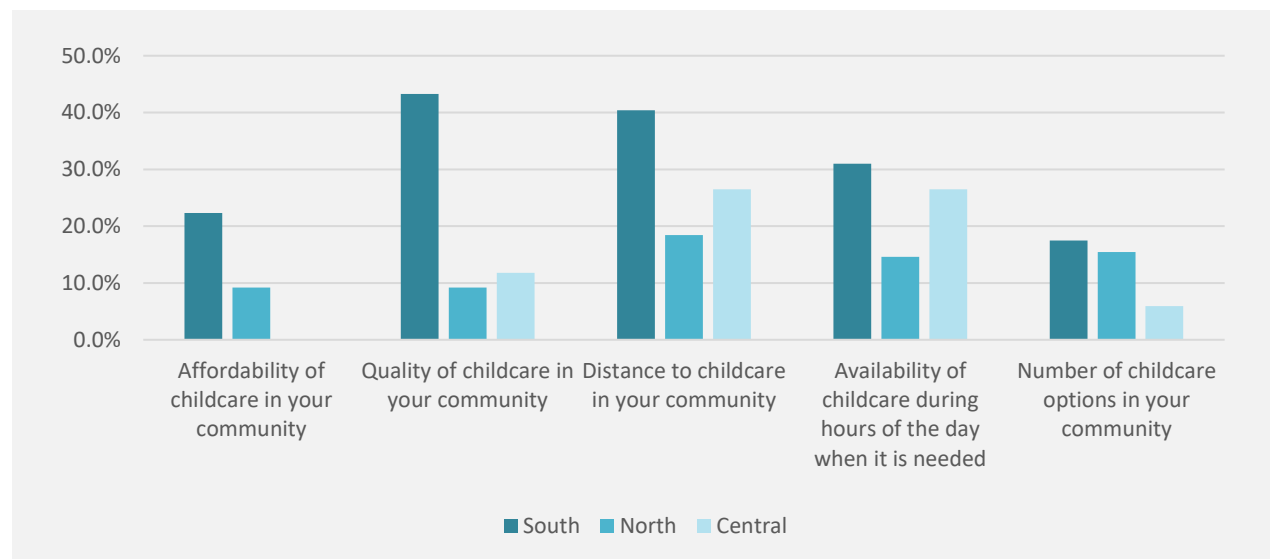


Figure 28. Respondents 'Very Satisfied' with Childcare in the Community by Sub-Region



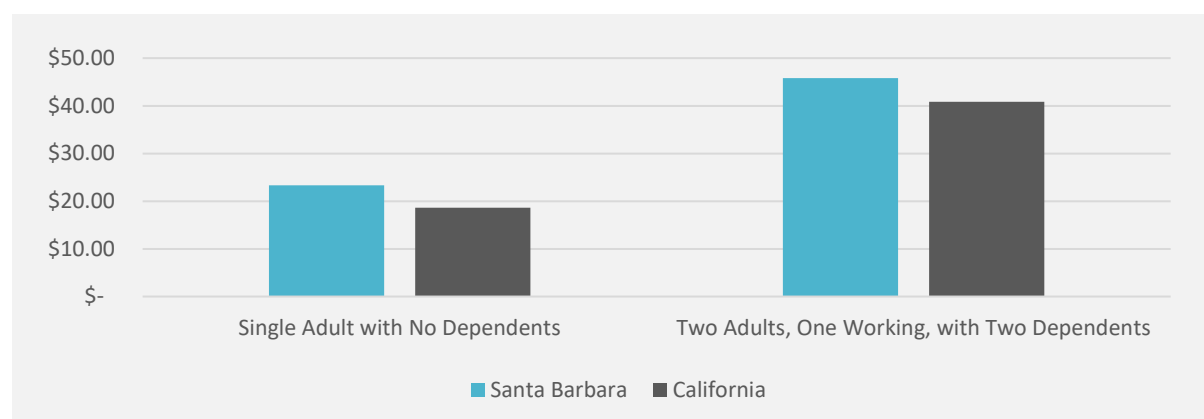
JOB QUALITY

The growth of jobs in a region can have little positive impact on workers if the new jobs are low-quality. This is particularly true in a place with high costs of living, such as Santa Barbara County. To account for regional costs of living it is important to look at living wages. Living wages are similar in concept to the poverty line, but include regionally-specific costs such as housing, insurance, and childcare. This provides a clearer picture into the true cost of living in a region and the economic well-being of its residents.

Figure 29 highlights the relatively high cost of living in Santa Barbara County according to the M.I.T. Living Wage Calculator.¹⁷ For a single adult with no dependents, the living wage in Santa Barbara County is \$23.33. For a family of four and one working parent, the hourly rate doubles to \$45.80. These rates are higher than California's notoriously high cost of living. Tracking metrics like living wages is important when discussing jobs and job quality in the region. If residents cannot afford to live in the region through the wages that employers provide, employers will eventually face challenges finding and retaining talent.

¹⁷ <https://livingwage.mit.edu/>

Figure 29. Hourly Living Wages¹⁸



Job quality is an important measure of a region's labor market. A region may have a lot of jobs, but if most of those jobs are pay low wages and require relatively little skill and education, the regional workforce and economy are likely to suffer. BW Research examined wage data from the Bureau of Labor Statistics' Occupational Employment Statistics (OES) to determine job quality. Occupations within 3-digit NAICS industries were assigned tiers based on median annual earnings. Looking at occupations within specific industries allows for differentiation between occupations across industries. This captures the difference between, for example, a medical equipment sales representative and a clothing retail sales representative. Since wages are strongly correlated with a job's skill, education, and experience requirements, wages provide an intuitive metric to assess job quality.

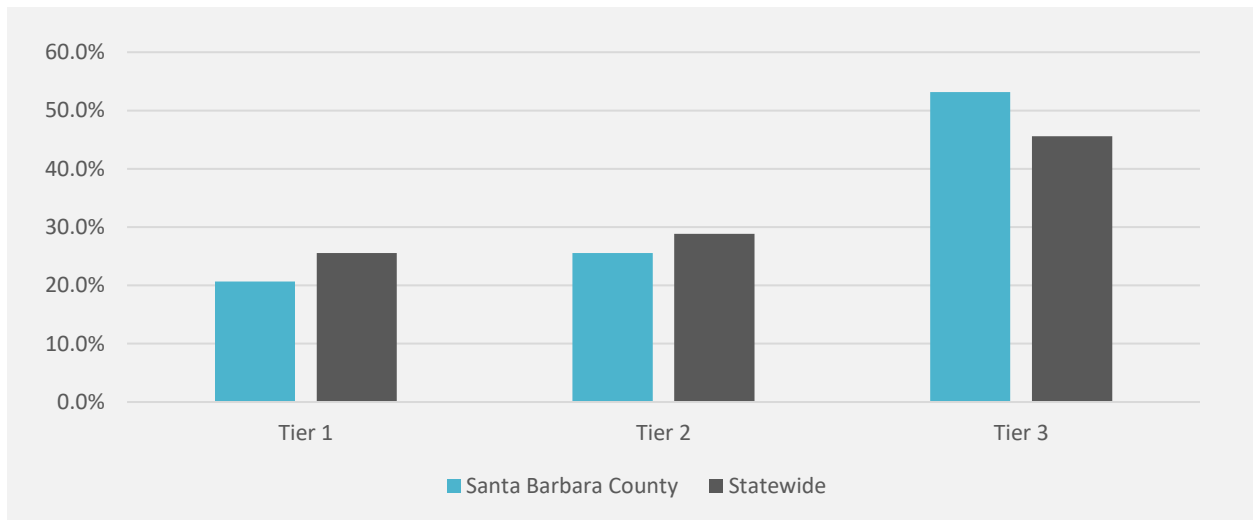
Tier 1 Occupations	Tier 2 Occupations	Tier 3 Occupations
<p>Tier 1 occupations are typically the highest-paying, highest-skilled occupations in the economy. This occupational category includes positions such as managers (e.g., Chief Executives and Sales Managers), professional positions (e.g., Lawyers and Physicians), and highly skilled technology occupations, such as scientists, engineers, computer programmers, and software developers.</p>	<p>Tier 2 occupations are typically the middle-skill, middle-wage occupations. This occupational category includes positions such as technicians, teachers, office and administrative positions (e.g., Accounting Clerks and Secretaries), and manufacturing, operations, and production positions (e.g., Assemblers, Electricians, and Machinists).</p>	<p>Tier 3 occupations are typically the lowest-paying, lowest-skilled occupations that have historically provided the largest portion of employment in the region. These occupations include positions such as security guards, food service and retail positions, building and grounds cleaning positions (e.g., Janitors), and personal care positions (e.g., Home Health Aides and Child Care Workers).</p>

Santa Barbara County has relatively lower job quality than the state average. Fifty-three percent of jobs in the county are Tier 3 jobs, which are the lowest-paying and lowest-skilled occupations. Santa Barbara County also lags behind the state in share of Tier 1 jobs by roughly five percentage-points (Figure 30). Lower job quality means that

¹⁸ M.I.T. Living Wage Calculator.

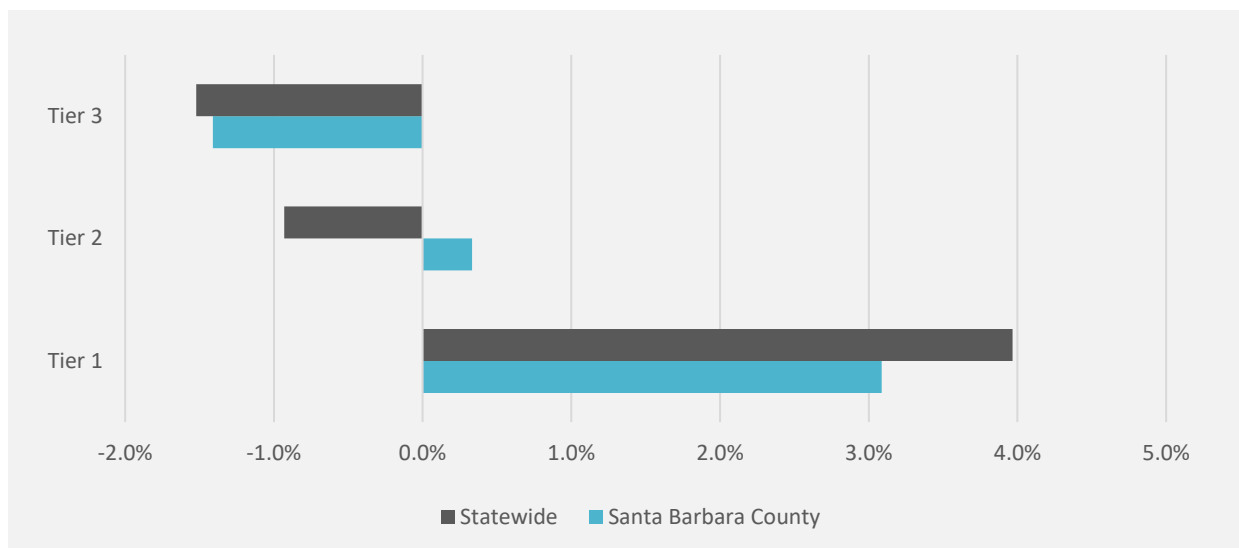
there is generally less opportunity for upward mobility or career advancement and a greater share of the population likely struggles to make ends meet.

Figure 30. Job Quality



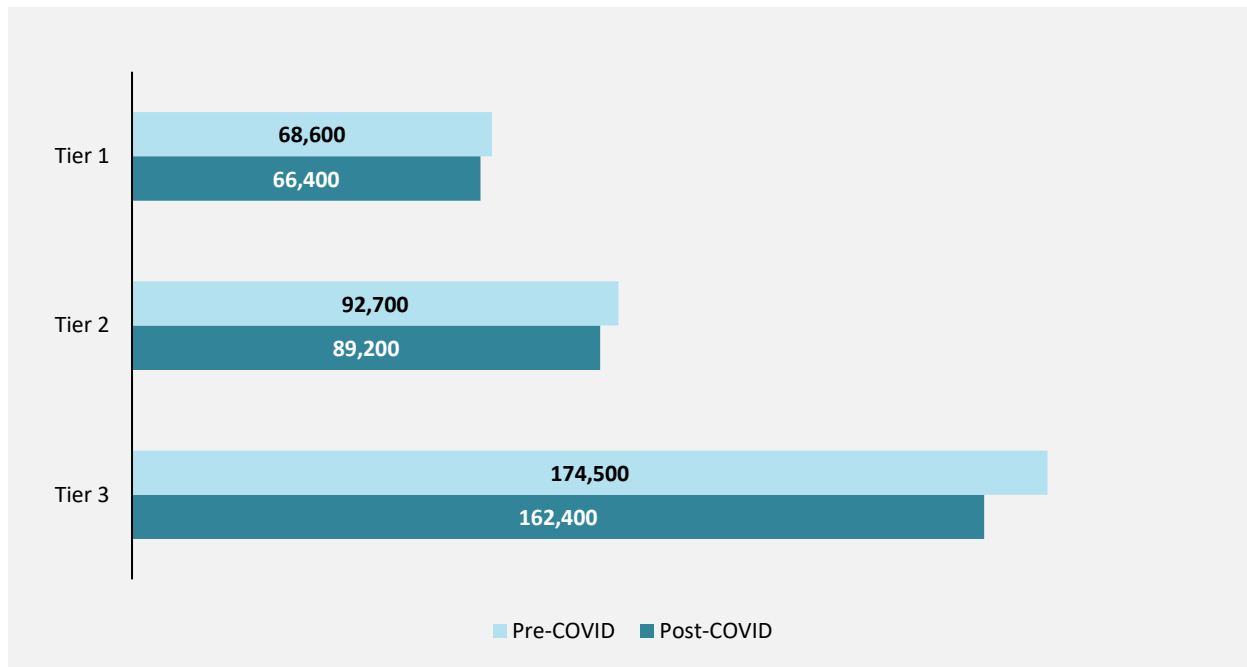
Fortunately, job quality in Santa Barbara County has improved over the past five years. Between 2014 and 2019, the proportion of Tier 1 jobs increased by 3% while the share of Tier 3 jobs declined. The share of Tier 2 jobs also increased during this time (Figure 31).

Figure 31. Change in Job Quality (2014-2019)



Tier 3 has lost twice as many jobs as Tier 1 and Tier 2 combined. Job losses among Tier 3 occupations account for two-thirds (68%) of all jobs lost in Santa Barbara County (Figure 32). Workers with Tier 3 jobs are also less likely to have substantial savings to fall back on, suggesting that without the added unemployment benefits these workers may have faced severe financial hardship.

Figure 32. COVID-19 Changes in Employment by Job Quality





Career Pathways

The disruption of the COVID-19 pandemic has left some industry clusters in stronger positions for a robust recovery than others. Optimal pathways within these industry clusters may have shifted as well.

The pathways listed below highlight key opportunities for workers looking to enter and advance within the Healthcare; Building and Design; Finance, Insurance, Banking, and Real Estate; and Professional and Business Services industry clusters. This section also includes two growth industry clusters. These growth clusters currently employ relatively few workers within the county but exhibit strong growth potential. The industries in this section were selected because of their relatively high average earnings, with entry-level roles typically providing living wages and strong potential for upward mobility as well as input from regional stakeholders.



BUILDING & DESIGN

The Building & Design industry cluster consists of firms and industries that design, construct, and repair buildings and infrastructure.

Table 2 illustrates three prominent career pathways within Building and Design in Santa Barbara County. Importantly, these pathways have entry-points that are accessible with a high school or community college diploma and have strong earning potential as individuals advance their careers. Table 1 showcases the program completions relevant to each of these occupations in the county, along with the estimated demand for these occupations. This data suggests that Construction Managers and General Operations Managers may be under-supplied in the county.

6,900

Number of Jobs in Santa
Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Most Common in Building and Design¹⁹

	AWARDS	TARGET RANGE
General and Operations Managers	128	218 – 245
Civil Engineers	0	50 – 55
Construction Managers	18	32 – 41
Electricians	0	10 – 75
First-line Supervisors of Mechanics, Installers, and Repairers	0	4 – 39
Architectural and Civil Drafters	15	17 – 20
Maintenance and Repair Workers, General	0	2 – 174
Project Management Specialists and Business Operations Specialists, All Other	0	0 – 218
Construction Laborers	0	0 – 171

¹⁹ Data from JobsEQ and the National Center for Education Statistics.
Target Range includes county-specific demand and national averages.

Table 2. Building and Design Career Pathways ²⁰

	ENTRY-LEVEL	MID-LEVEL	SENIOR LEVEL
Design and Pre-Construction <i>This segment includes the drafting, designing, and planning stages of the construction process</i>	Architectural and Civil Drafters Median Hourly Earnings \$29.98 Typical Education Associate's degree	Project Management Specialists Median Hourly Earnings \$31.00	Civil Engineer Median Hourly Earnings \$54.04 Typical Education: Bachelor's degree
Construction <i>This segment includes the foundation work, wiring, and building process</i>	Construction Laborers Median Hourly Earnings \$22.57 Typical Education No formal education credential	Electrician Median Hourly Earnings \$28.36	Construction Managers Median Hourly Earnings \$47.37 Typical Education Bachelor's degree
Maintenance & Operations <i>This segment includes maintenance, repair, and operational activities required to maintain facilities and infrastructure</i>	General Maintenance and Repair Workers Median Hourly Earnings \$20.59 Typical Education High school diploma or equivalent	First-Line Supervisors of Mechanics, Installers, and Repairers Median Hourly Earnings \$35.78	General and Operations Managers Median Hourly Earnings \$46.95 Typical Education Bachelor's degree

²⁰ EMSI 2020.3



HEALTHCARE

The Healthcare industry cluster includes industries and firms that provide medical diagnoses and treatment and includes allied health roles.

Table 2 showcases several pathways within the healthcare industry. All of these pathways offer accessible entry-points and strong opportunities to increase earnings. Data in Table 2 suggests that the number of Registered Nurses, Medical Secretaries, and Facilities Managers may be under-supplied in Santa Barbara County.

25,800

Number of Jobs in Santa
Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Most Common in Healthcare²¹

	AWARDS	TARGET RANGE
Registered Nurses	94	198 – 250
Medical Secretaries and Administrative Assistants	6	34 – 125
Facilities Managers	15	27 – 30
Administrative Services Managers	2	3 – 4
Nursing Assistants	86	38 – 148
Licensed Practical and Licensed Vocational Nurses	102	48 – 64
Medical Dosimetrists, Medical Records Specialists, and Health Technologists and Technicians, All Other	78	22 – 28

²¹ Data from JobsEQ and the National Center for Education Statistics.
Target Range includes county-specific demand and national averages.

Table 2. Healthcare Career Pathways ²²

	ENTRY-LEVEL	MID-LEVEL	SENIOR LEVEL
Patient Services <i>This segment includes workers who attend and provide medical care to patients</i>	Certified Nurse Assistant CNA Median Hourly Earnings \$17.73 Typical Education Postsecondary nondegree award	Licensed Practical and Licensed Vocational Nurses Median Hourly Earnings \$28.64	Registered Nurse Median Hourly Earnings \$50.99 Typical Education Bachelor's degree
Medical Administration <i>This segment includes activities centered around the administration of healthcare activities</i>	Medical Secretaries and Administrative Assistant Median Hourly Earnings \$19.76 Typical Education High school diploma or equivalent	Health Technologists and Technicians Median Hourly Earnings \$22.90	Administrative Services and Facilities Managers Median Hourly Earnings \$44.62 Typical Education Bachelor's degree
Diagnostic Services <i>This segment works to find and diagnose the root causes of medical ailments</i>	Medical Assistants Median Hourly Earnings \$19.76 Typical Education Postsecondary nondegree award	Radiological Technologists and Technicians Median Hourly Earnings \$42.68	Physician's Assistant Median Hourly Earnings \$56.80 Typical Education Master's degree

²² EMSI 2020.3



PROFESSIONAL & BUSINESS SERVICES

Firms in Professional and Business Services industries provide a range of services, including legal, accounting, landscaping, consulting, and other specialty services.

Each of the career pathways listed below in Table 2 has entry-points that are accessible with a high school diploma or community college certificate. Each pathway also has an opportunity for specialization and advancement, so workers entering the pathway can advance their careers as they develop their education and skillset. Data on relevant educational program completions suggests that the number of Accountants and Auditors, Lawyers, and Paralegals and Legal Assistants may be undersupplied in the county (Table 1Table 1).

17,800

Number of Jobs in Santa
Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Essential to Professional and Business Services²³

	AWARDS	TARGET RANGE
General and Operations Managers	128	218 – 245
Accountants and Auditors	0	83 – 162
Lawyers	13	41 – 41
Project Management Specialists and Business Operations Specialists, All Other	0	0 – 218
Paralegals and Legal Assistants	7	7 – 32
Billing and Posting Clerks	0	0 – 59
Bookkeeping, Accounting, and Auditing Clerks	34	22 – 223
Legal Secretaries and Administrative Assistants	2	0 – 13

Table 2. Professional and Business Services Career Pathways ²⁴

²³ Data from JobsEQ and the National Center for Education Statistics. Target Range includes county-specific demand and national averages.

²⁴ EMSI 2020.3

	ENTRY-LEVEL	MID-LEVEL	SENIOR LEVEL
Legal <i>This segment includes careers that provide legal services to individuals and organizations</i>	Legal Secretaries and Administrative Assistants Median Hourly Earnings \$22.33 Typical Education High school diploma or equivalent	Paralegals and Legal Assistants Median Hourly Earnings \$26.71 	Lawyers Median Hourly Earnings \$53.54 Typical Education Doctoral or professional degree
Administrative <i>This segment includes the support and administrative services provided to a wide range of companies</i>	Billing and Posting Clerk Median Hourly Earnings \$20.78 Typical Education: High school diploma or equivalent	Project Management Specialist Median Hourly Earnings \$31.00 	General and Operations Managers Median Hourly Earnings \$46.95 Typical Education Bachelor's degree
Accounting <i>This segment includes accounting, bookkeeping, and auditing services</i>	Bookkeeping, Accounting, and Auditing Clerks Median Hourly Earnings \$23.93 Typical Education High school diploma or equivalent	Project Management Specialists Median Hourly Earnings \$31.00 	Accountants and Auditors Median Hourly Earnings \$36.27 Typical Education Bachelor's degree



FINANCE, BANKING, INSURANCE & REAL ESTATE

The Finance, Insurance, Banking, and Real Estate industry cluster includes industries and firms that specialize in financial management and transactions, insurance and actuarial activities, and real estate transactions.

The pathways presented in Table 22 offer a range of entry-points to interested job seekers and offer strong advancement opportunities. Program completion data from 2018-2019 suggest that Loan Officers; Property, Real Estate, and Community Association Managers; Real Estate Sales Agents; and Claims Adjusters, Examiners, and Investigators may be undersupplied in the county (Table 1).

7,300

Number of Jobs in Santa
Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Essential to FIRE²⁵

	AWARDS	TARGET RANGE
GENERAL AND OPERATIONS MANAGERS	128	218 – 245
LOAN OFFICERS	1	8 – 21
PROPERTY, REAL ESTATE, AND COMMUNITY ASSOCIATION MANAGERS	2	3 – 44
REAL ESTATE SALES AGENTS	2	3 – 38
CLAIMS ADJUSTERS, EXAMINERS, AND INVESTIGATORS	0	1 – 13
INSURANCE SALES AGENTS	0	1 – 36
REAL ESTATE BROKERS	1	1 – 14
INSURANCE APPRAISERS, AUTO DAMAGE	0	0 – 1
TELLERS	1	0 – 30
INSURANCE CLAIMS AND POLICY PROCESSING CLERKS	0	0 – 23

²⁵ Data from JobsEQ and the National Center for Education Statistics. Target Range includes county-specific demand and national averages.

Table 2. Finance, Banking, Insurance, and Real Estate (FIRE) Career Pathways ²⁶

	ENTRY-LEVEL	MID-LEVEL	SENIOR LEVEL
Banking <i>This segment includes the staff that work at banks, credit unions, and other financial institutions available to the public</i>	Tellers Median Hourly Earnings \$16.90 Typical Education High school diploma or equivalent	Loan Officer Median Hourly Earnings \$32.57	General and Operations Manager Median Hourly Earnings \$49.95 Typical Education Bachelor's degree
Real Estate <i>This segment includes activities centered around real estate transactions</i>	Property, Real Estate, and Community Association Managers Median Hourly Earnings \$28.77 Typical Education: High school diploma or equivalent	Real Estate Sales Agent Median Hourly Earnings \$28.52	Real Estate Brokers Median Hourly Earnings \$31.08 Typical Education High school diploma or equivalent
Insurance <i>This segment includes roles within the insurance industry</i>	Insurance Claims and Policy Processing Clerks Median Hourly Earnings \$20.47 Typical Education High school diploma or equivalent	Insurance Sales Agents Median Hourly Earnings \$25.37	Claims Adjusters, Examiners, and Investigators Median Hourly Earnings: \$31.19 Typical Education Bachelor's degree

²⁶ EMSI 2020.3



Growth Industries and Pathways

The following industry clusters and career pathways are highlighted because they currently employ a relatively small share of the workforce, but their recent growth, wages, and innovative fields make these industry clusters potential growth opportunities for Santa Barbara County.



INFORMATION & COMMUNICATION TECHNOLOGY

While the Information and Communications Technology (ICT) industry cluster has seen an overall employment decline in recent years, specific industries within the cluster have seen strong growth and offer opportunities for niche specialization. The growth in ICT has primarily been driven by Custom Computer Programming and Services as well as Software Publishing. Sales Managers and Computer User Support Specialists may be undersupplied by accredited talent pipelines in the county (Table 1Table).

6,100

Number of Jobs in Santa Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Essential to ICT²⁷

	AWARDS	TARGET RANGE
Sales Managers	42	71 – 71
Computer User Support Specialists	13	38 – 77
Securities, Commodities, and Financial Services Sales Agents	0	3 – 45
Customer Service Representatives	0	2 – 241
Software Developers and Software Quality Assurance Analysts and Testers	133	133 – 226
Web Developers and Digital Interface Designers	11	11 – 20
Sales Representatives of Services, except Advertising, Insurance, Financial Services, and Travel	2	2 – 165

²⁷ Data from JobsEQ and the National Center for Education Statistics. Target Range includes county-specific demand and national averages.

Table 3. Information and Communications Technology Career Pathways²⁸

	ENTRY-LEVEL	MID-LEVEL	SENIOR LEVEL
Computer Systems <i>This sector includes the design, testing, creation, and support for various computer systems.</i>	Computer User Support Specialists Median Hourly Earnings \$27.02 Typical Education Some college, no degree	Web Developers and Digital Interface Designers Median Hourly Earnings \$41.53	Software Developers and Software Quality Assurance Analysts and Testers Median Hourly Earnings \$51.10 Typical Education Bachelor's Degree
Sales <i>This segment includes the sales and support services provided to the computer service providers</i>	Customer Service Representatives Median Hourly Earnings \$18.44 Typical Education High school diploma or equivalent	Sales Representatives of Services Median Hourly Earnings \$22.16	Sales Managers Median Hourly Earnings \$58.71 Typical Education Bachelor's Degree

²⁸ EMSI 2020.3



OTHER MANUFACTURING

Other Manufacturing is an industry cluster that includes a range of manufacturing activities, from plastics and metals production to textile and fabric finishing. Machine Shops, Other Industrial machinery Manufacturing, and Sporting and Athletic Goods Manufacturing are among the top industries within the county.

Qualified talent for positions such as Sales Managers and Shipping, Receiving, and Inventory Clerks may be in short supply relative to the number of workers demanded by firms across the county (Table 1Table).

3,200

Number of Jobs in Santa
Barbara County

Table 1. Program Completions and Regional Demand (2018-2019) for Occupations Essential to Other Manufacturing²⁹

	AWARDS	TARGET RANGE
SALES MANAGERS	42	71 – 71
SHIPPING, RECEIVING, AND INVENTORY CLERKS	0	4 – 61
FIRST-LINE SUPERVISORS OF PRODUCTION AND OPERATING WORKERS	0	4 – 49
SALES REPRESENTATIVES, WHOLESALE AND MANUFACTURING, TECHNICAL AND SCIENTIFIC PRODUCTS	0	0 – 40
SALES REPRESENTATIVES, WHOLESALE AND MANUFACTURING, EXCEPT TECHNICAL AND SCIENTIFIC PRODUCTS	57	7 – 141
MACHINISTS	6	4 – 39
PLATING MACHINE SETTERS, OPERATORS, AND TENDERS, METAL AND PLASTIC	0	0 – 2

²⁹ Data from JobsEQ and the National Center for Education Statistics. Target Range includes county-specific demand and national averages.

Table 2. Other Manufacturing Career Pathways³⁰

	Entry-Level	Mid-Level	Senior Level
Production <i>This sector includes the design, prototyping, and production of industrial goods, such as farm equipment</i>	Plating Machine Setters, Operators, and Tenders Median Hourly Earnings \$17.02 Typical Education High school diploma or equivalent	Machinists Median Hourly Earnings \$20.25	First-Line Supervisors of Production and Operating Workers Median Hourly Earnings \$33.38 Typical Education: High School Diploma
Sales <i>This segment includes the sales and support services provided to the manufacturers</i>	Shipping, Receiving, and Inventory Clerks Median Hourly Earnings \$17.80 Typical Education No formal education required	Sales Representatives Median Hourly Earnings \$40.94	Sales Managers Median Hourly Earnings \$58.71 Typical Education Bachelor's degree

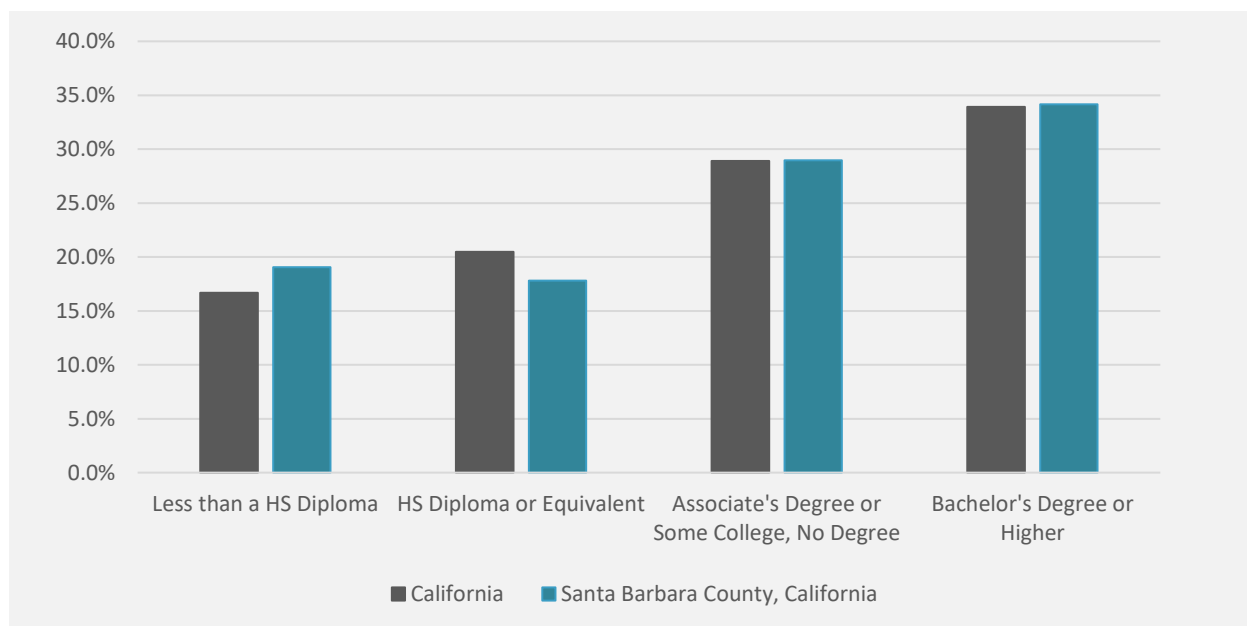
³⁰ EMSI 2020.3

The Underlying Workforce

This section of the report discusses some characteristics of the Santa Barbara County workforce. Understanding these characteristics can help inform strategies to remediate systemic gaps or barriers to employment success.

Education rates in Santa Barbara County are roughly equivalent to the broader state. Roughly one-third (34%) of the adult population (25 years and older) have a Bachelor's degree or more in Santa Barbara County. However, the county also has a greater proportion of residents who have less than a high school diploma (19%) compared to the state (17%) (Figure 33). These workers without a high school degree have the least opportunities to achieve living wages and career mobility, so minimizing the number of residents without a high school diploma is an important goal.

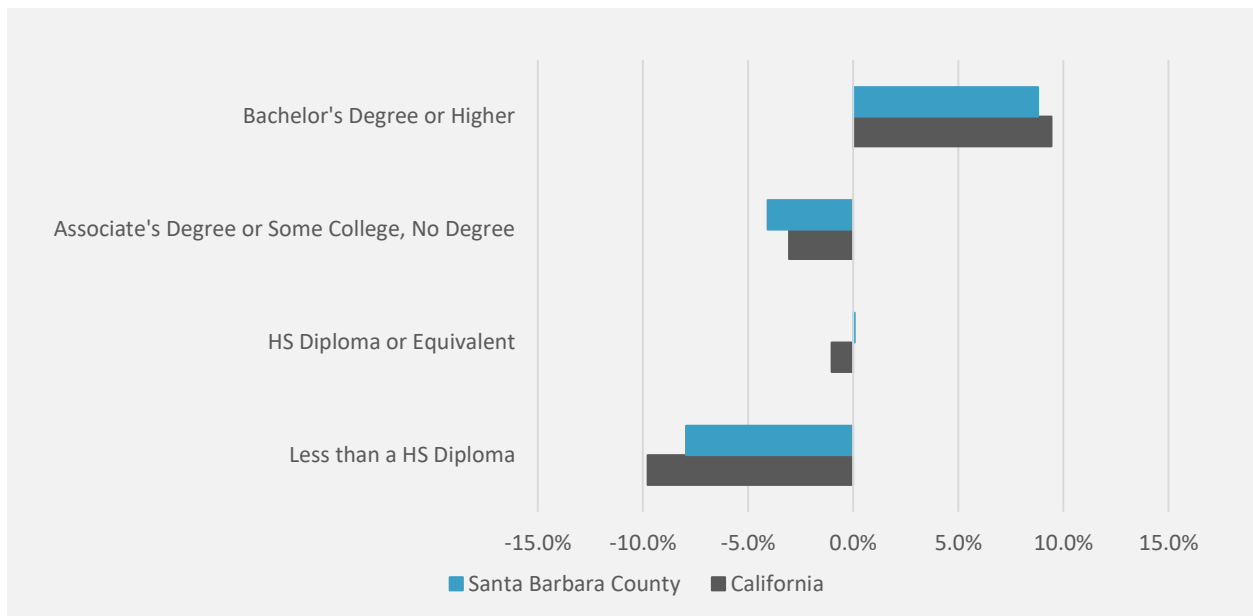
Figure 33. Educational Attainment of Residents 25 Years and Older³¹



Santa Barbara County has been making progress towards decreasing the share of residents without a high school diploma. Between 2014 and 2019, the share of residents without a high school diploma or equivalent fell by 8%. At the same time, the share of residents with a Bachelor's degree or higher increased by 9%. Developing a better educated workforce is a crucial step towards advancing the region's workforce, quality of life, and ability to attract and retain employers (Figure 34).

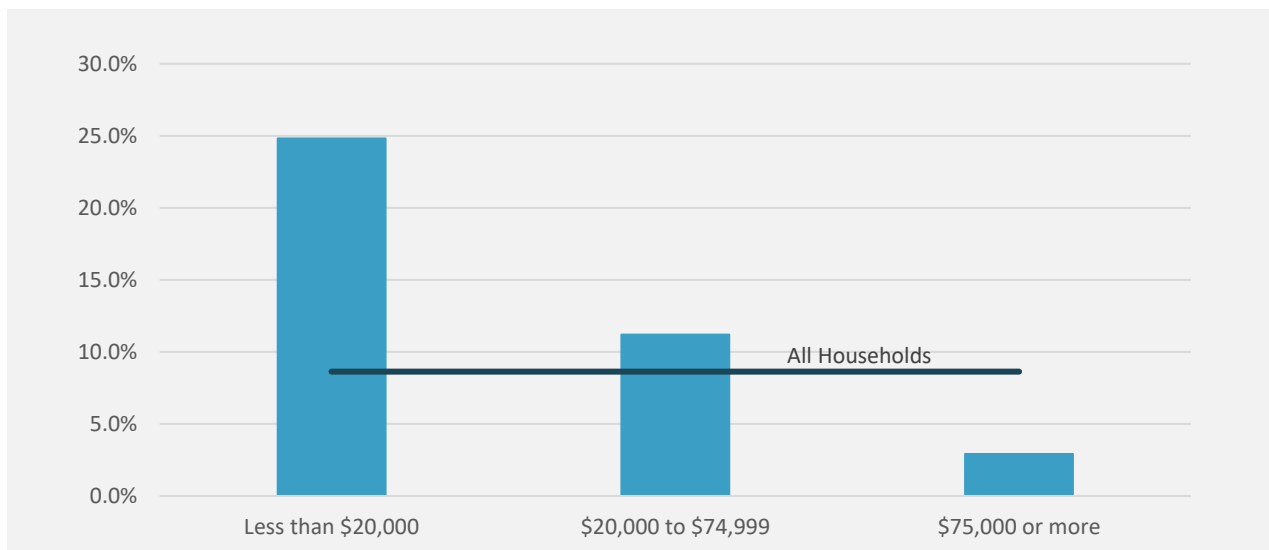
³¹ U.S. Census Bureau, 2014-2019 American Community Survey 5-Year Estimates.

Figure 34. Change in Educational Attainment (2014-2019)³²



The pandemic has brought internet access to the forefront of attention. Roughly 9% of households in Santa Barbara County do not have internet access, though this rate is much higher among lower-income households. In fact, one-in-four households with incomes lower than \$20,000 per year do not have internet access (Figure 35). As the world of work becomes increasingly digital, internet access is increasingly an equity issue that perpetuates inequalities in its absence.

Figure 35. No Internet Access and Annual Household Income³³

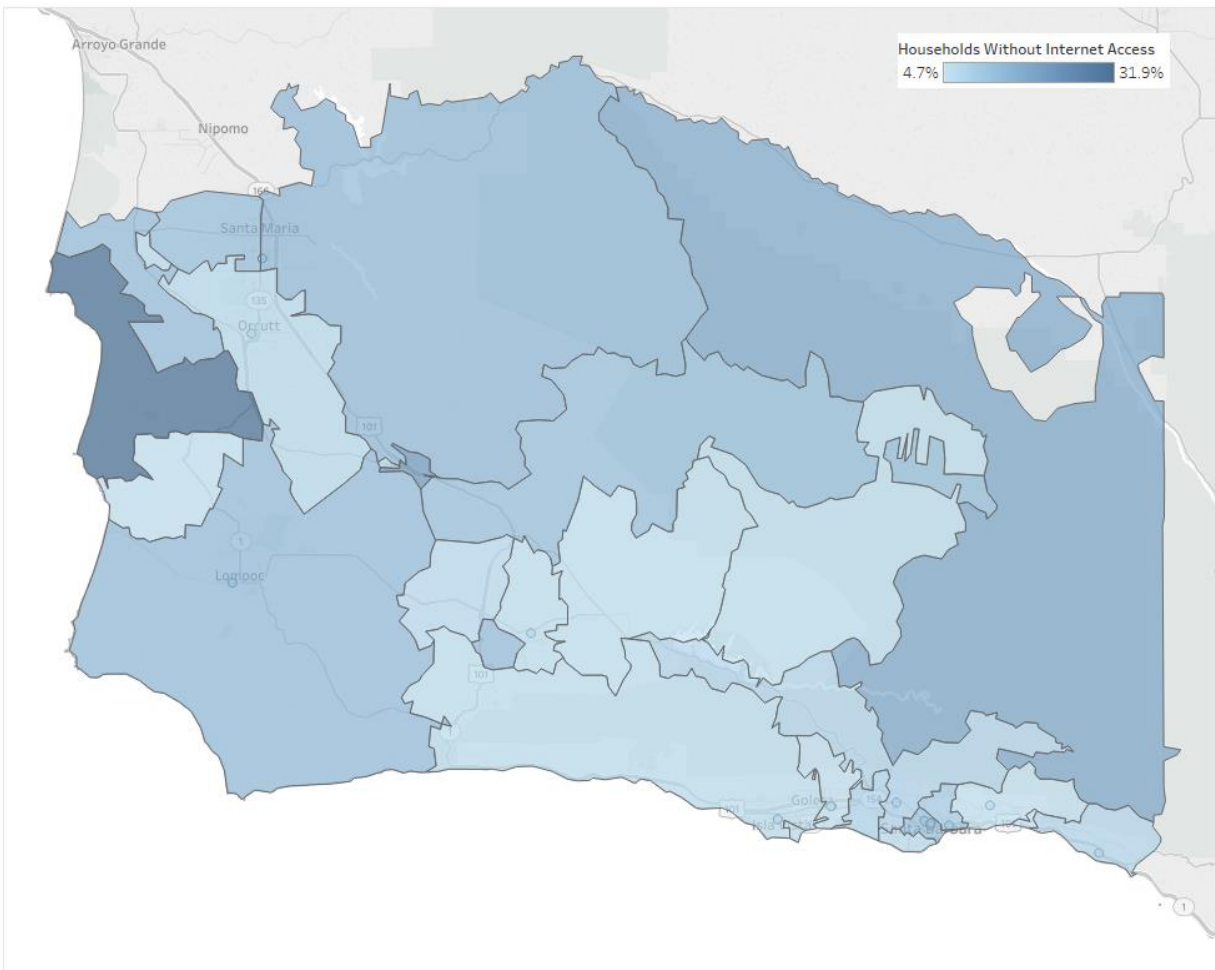


³² U.S. Census Bureau, 2014-2019 American Community Survey 5-Year Estimates.

³³ U.S. Census Bureau, 2014-2019 American Community Survey 5-Year Estimates.

Lack of internet access among households is also geographically concentrated. Figure 36 highlights that more rural and westward zip codes tend to have higher rates of households lacking internet access. Roughly a third (32%) of households in the zip code 93429 did not have internet access as of 2019.

Figure 36. Share of Households Without Internet Access (2019)³⁴



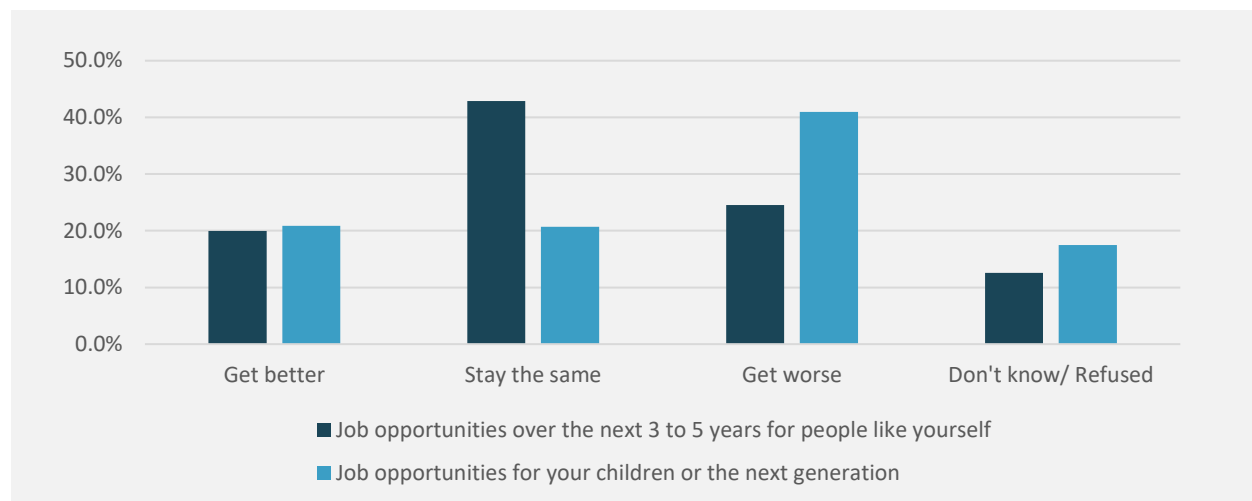
PERCEPTIONS OF FUTURE CHALLENGES AND OPPORTUNITIES IN SANTA BARBARA COUNTY

Most residents feel mixed about short-term employment prospects for themselves and relatively negative for their children or future generations. A plurality (43%) of respondents reported they feel job prospects for people like themselves will remain the same over the next 3 to 5 years. In the longer term, expectations trend more negatively. More than four-in-ten (41%) feel that their children or the next generation will face worse job opportunities (Figure 37). It is also notable that Hispanic or Latino respondents are more likely to feel optimistic about the long-term future while respondents who identify as American Indian, Alaskan Native, Pacific Islander, or some other race are more likely to be pessimistic. Respondents under the age of 35 also tended to be more

³⁴ U.S. Census Bureau, 2014-2019 American Community Survey 5-Year Estimates.

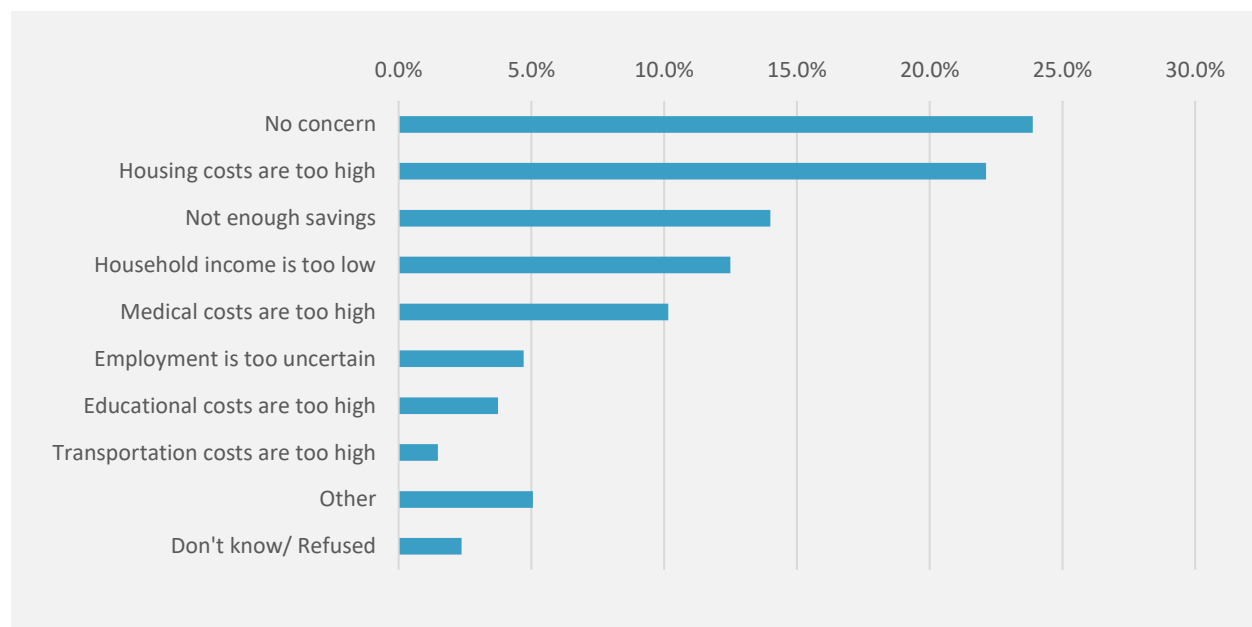
optimistic about the long term future than older respondents. Lower income residents also tended to have more pessimistic expectations of their job prospects in the next 3 to 5 years.

Figure 37. Expectations for Future Employment Opportunities



The greatest financial concerns centered around high housing costs and relatively low incomes and savings. The greatest financial concerns reported were high housing costs (22%), not enough savings (14%) and low household incomes (13%). Roughly one-in-four (24%) respondents reported no immediate financial concerns for their households (Figure 38).

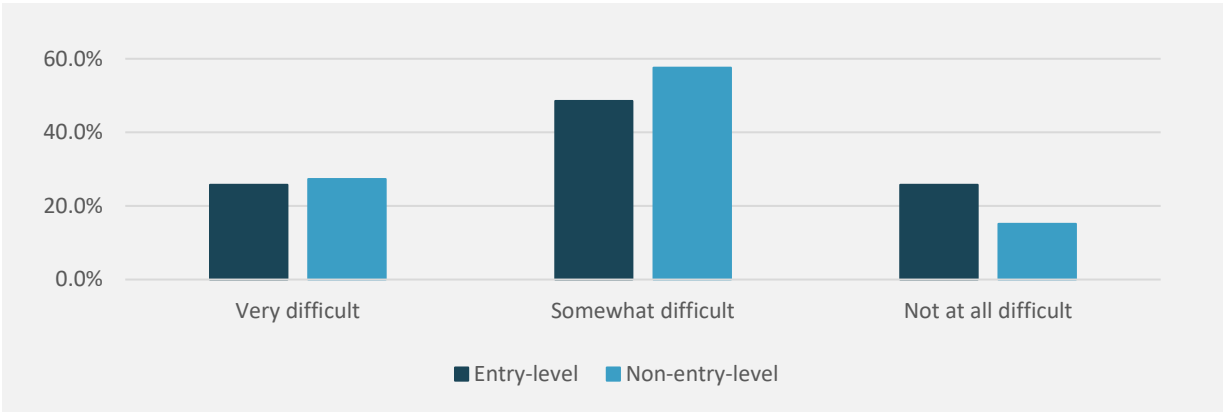
Figure 38. Greatest Financial Concerns



Non-Profit Employer Challenges and Perceptions

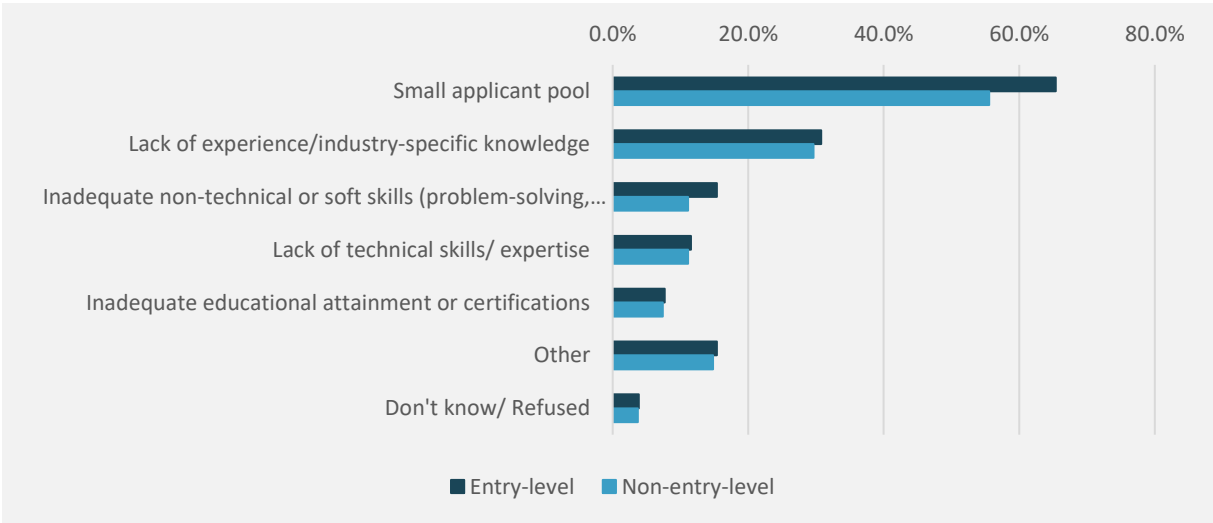
Non-profit employers tend to find hiring entry-level talent somewhat easier than non-entry-level talent. While roughly a quarter (26%) of employers stated that hiring entry-level talent was ‘not at all difficult,’ only 15% said the same for non-entry-level workers (Figure 39).

Figure 39. Hiring Challenges



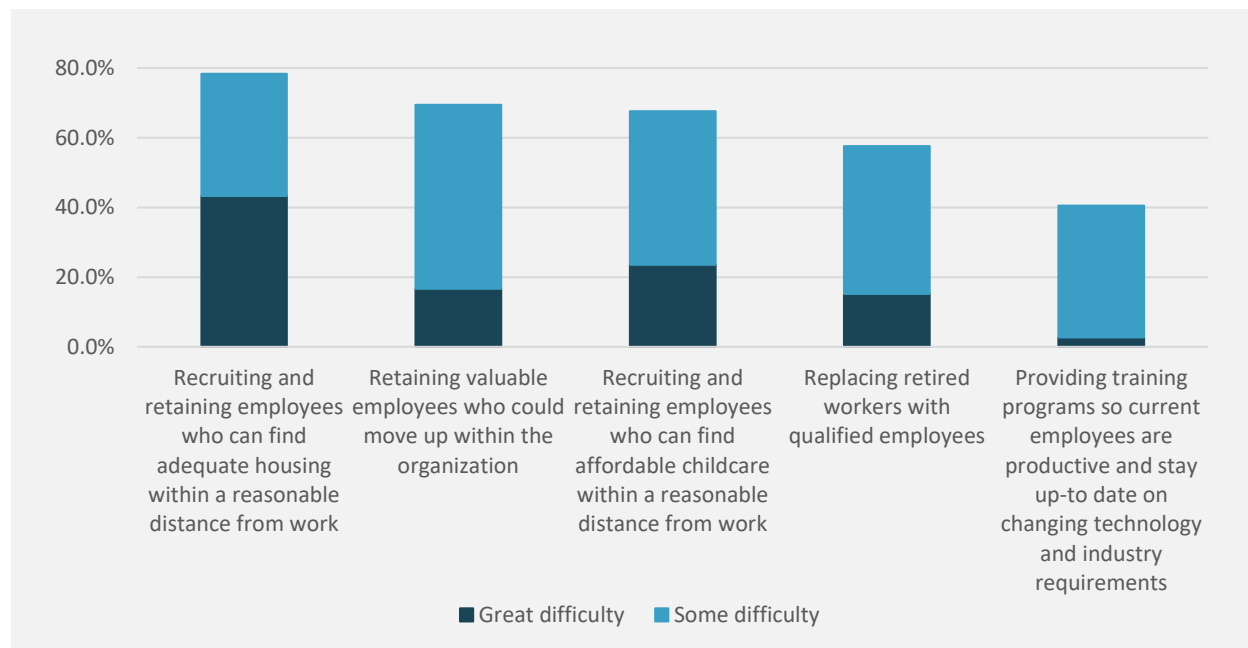
More than six-in-ten (62%) non-profit organizations reported there are particular occupations they struggle to find qualified applicants for, though these occupations ranged from infant care workers to nurse practitioners and office assistants. A small applicant pool was the most common reason for hiring difficulty for both experienced and entry-level workers. A lack of experience or industry-specific knowledge and inadequate non-technical or soft skills were the other most-common reasons cited for hiring difficulty (Figure 40). High compensation expectations were the most commonly mentioned ‘Other’ reason given.

Figure 40. Reasons for Hiring Difficulty



Recruiting and retaining employees who can find adequate housing within a reasonable distance from work was by far the most challenging workforce issue non-profit organizations face. Forty-three percent of non-profit respondents reported ‘great difficulty’ with this issue and another 35% reported ‘some difficulty.’ Other common issues are retaining valuable employees who could move up within the organization and recruiting and retaining employees who can find affordable childcare within a reasonable distance from work (Figure 41).

Figure 41. Key Workforce Issues



TALENT SOURCING

Non-profit organizations often rely on a mix of internal and external talent for non-entry-level roles, but most talent is already living within Santa Barbara County. Non-profit employers rely on a mixture of internal promotion and external hires to fill experienced non-entry-level positions (Figure 42). When looking for new talent, non-profits tend to look within Santa Barbara County (Figure 43). High satisfaction levels with education and training institutions within the county (Figure 44) likely play a role in high rates of talent sourcing from within the county. Non-profit organizations also generally consider Santa Barbara County as a good place to do business; nearly two-thirds (64%) reported it is an ‘excellent’ or ‘good’ place to do business (Figure 45).

Figure 42. Source of Non-Entry-Level Talent

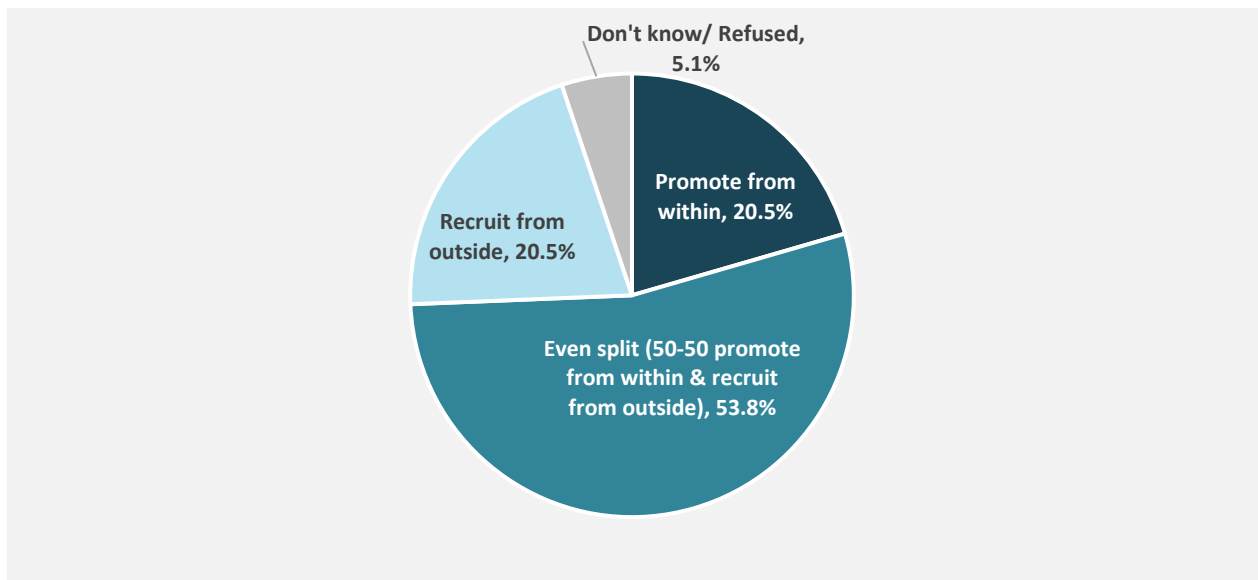


Figure 43. Frequency of Recruiting Talent from Outside Santa Barbara County

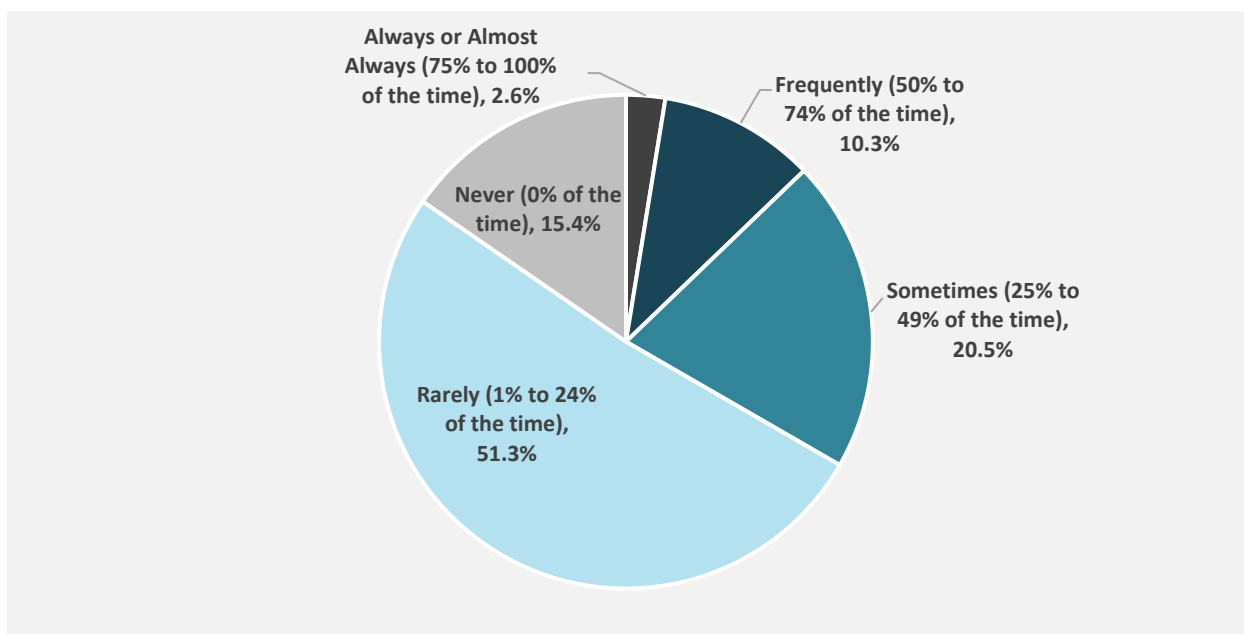


Figure 44. Satisfaction with Santa Barbara County Education and Training Institutions

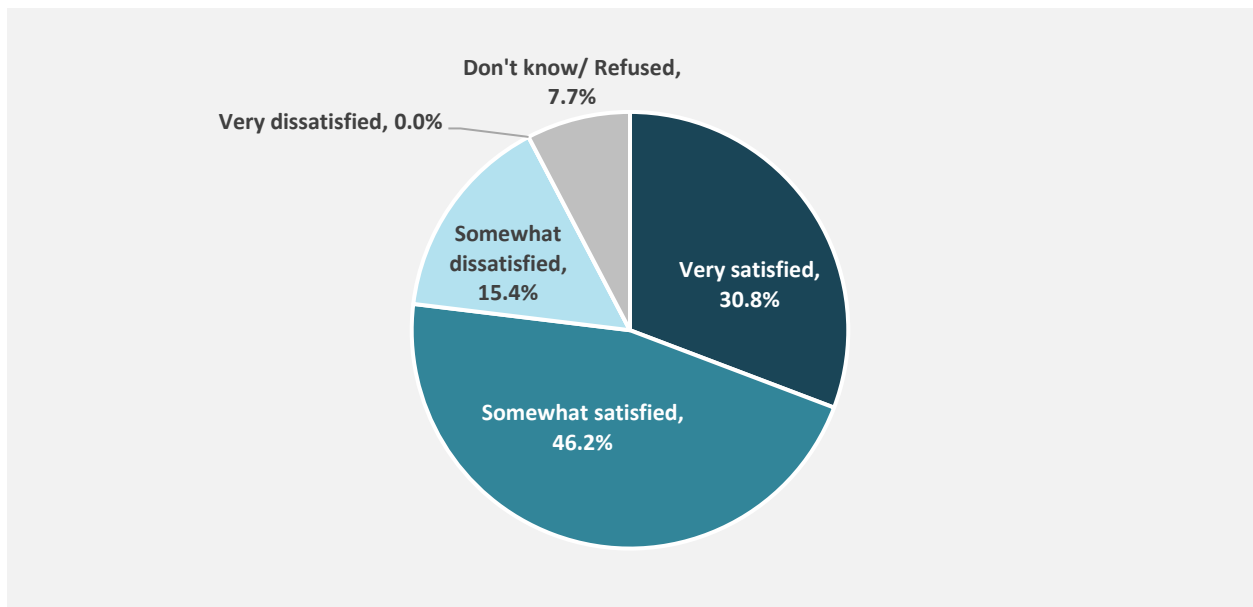
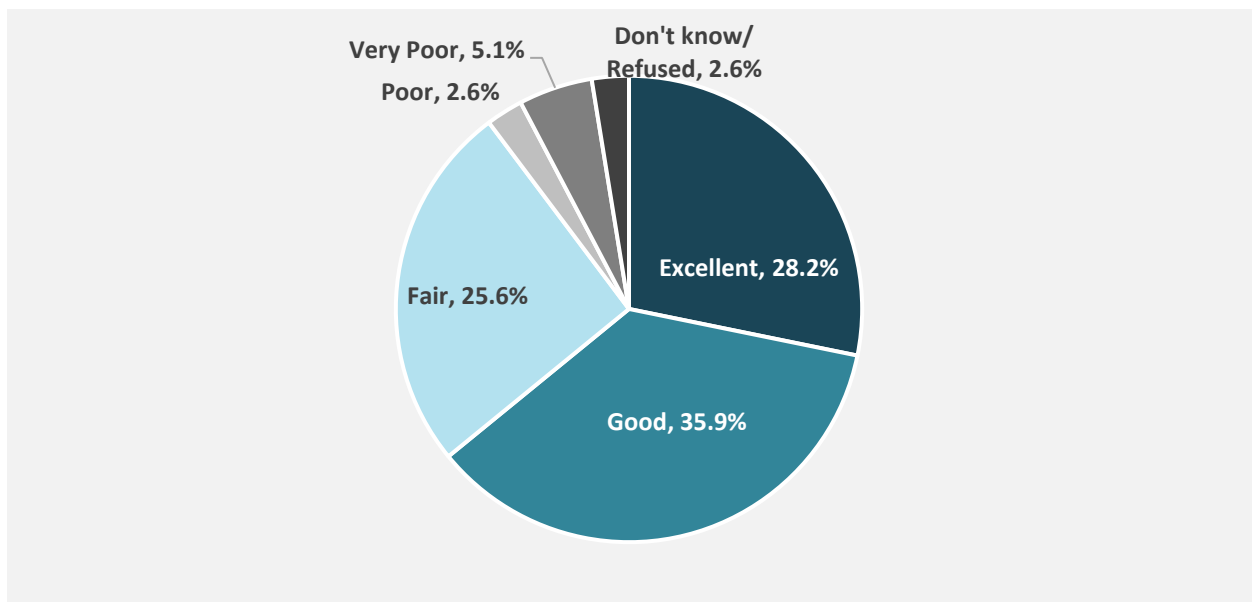


Figure 45. Satisfaction with Santa Barbara County as a Place to do Business



Appendix A: Research Methodology

Population and demographic figures at the zip code and County level were obtained from the U.S. Census Bureau, 2014-2019 American Community Survey 5-Year Estimates.

BW Research utilized EMSI and JobsEQ for baseline employment figures. EMSI updates data quarterly. The 2020.3 dataset was used for this report.

To capture the most up-to-date data available on the impacts of the COVID-19 pandemic, BW Research drew from a range of data sources. Employment and unemployment claims data were collected from the California Employment Development Department, and small business loan data retrieved from the U.S. Department of the Treasury. Another substantial source of COVID-19 impact data was retrieved from Opportunity Insights, a team of researchers at Harvard University led by Raj Chetty. The Opportunity Insights data is compiled from a range of private sources, which provide a near real-time picture of national and local economies. For more information about the Opportunity Insights data and methodology, please visit <https://www.tracktherecovery.org/>.

Survey Methodology

BW Research conducted online (email) surveys with residents 18 years of age or older in Santa Barbara County. A total of 463 residents completed the survey representing a margin of error of +/- 4.55 percent. The online survey was programmed in-house by BW Research. Quotas were created in order to be representative by age, gender, and region (North, Central, and South Santa Barbara County).

Additionally, BW Research conducted an online survey of non-profit, childcare, education, and human services employers in Santa Barbara County. This survey aimed to provide a qualitative assessment or snapshot of the challenges and needs of these organizations a year after the beginning of the pandemic. The survey was fielded to a list of 368 non-profit, childcare, education, or human services providers organizations provided by the Santa Barbara Foundation. A total of 40 organizations completed the survey. The online survey was programmed in-house by BW Research.

Appendix B: Resident Survey Toplines



Santa Barbara Foundation & WDB
General Population Survey Toplines

March 2021

n = 463

.....

Introduction:

Hello, may I please speak to _____. Hi, my name is _____ and I'm with an independent research firm calling on behalf of the Santa Barbara Workforce Development Board. They are working with the Santa Barbara Foundation and would value your participation in a brief survey about the region's talent.

(If needed): This should only take a few minutes of your time.

(If needed): I assure you that we are an independent research agency and that all of your responses will remain strictly confidential.

(If needed): This is a study about issues of importance in your community – it is a survey only and we are not selling anything.

(If needed): This survey should only take 10-15 minutes of your time.

(If respondent indicates that he/she is a city employee, council member, or elected official, thank him/her for his/her time and end the interview.)

(If the individual mentions the national do not call list, respond according to American Marketing Association guidelines): "Most types of opinion and marketing research studies are exempt under the law that congress recently passed. That law was passed to regulate the activities of the telemarketing industry. This is a legitimate research call. Your opinions count!")

~~~~~

## Screenener Questions

SA. What is your home zip code? (USE ZIP CODES FROM SANTA BARBARA COUNTY)

|        |                         |
|--------|-------------------------|
| 100.0% | In Santa Barbara County |
|--------|-------------------------|

|      |                              |
|------|------------------------------|
| 0.0% | Outside Santa Barbara County |
|------|------------------------------|

SB. What year were you born?

|       |            |
|-------|------------|
| 6.2%  | Ages 18-24 |
| 9.9%  | Ages 25-34 |
| 14.8% | Ages 35-44 |
| 16.7% | Ages 45-54 |
| 22.7% | Ages 55-64 |
| 29.7% | Ages 65+   |

.....

## I. Introduction

1. To begin, how long have you lived in Santa Barbara County?

|       |                     |
|-------|---------------------|
| 1.7%  | Less than 1 year    |
| 5.8%  | 1 to 4 years        |
| 8.8%  | 5 to 9 years        |
| 7.2%  | 10 to 14 years      |
| 76.0% | 15 or more years    |
| 0.5%  | Don't know/ Refused |

Next, I would like to ask you about work in the region.

2. Are you currently working, either part-time or full-time for pay?

|       |                                                                                                                               |
|-------|-------------------------------------------------------------------------------------------------------------------------------|
| 45.7% | Yes, full-time                                                                                                                |
| 13.2% | Yes, part-time                                                                                                                |
| 29.3% | No                                                                                                                            |
| 11.8% | I have recently stopped working or have been furloughed because of regulations or decreased business associated with COVID-19 |

[IF Q2 = 3 OR 4, SKIP TO Q11]

3. Are you currently working at more than one job for pay? (n=271)

|       |     |
|-------|-----|
| 15.1% | Yes |
|-------|-----|

|       |                     |
|-------|---------------------|
| 84.2% | No                  |
| 0.7%  | Don't know/ Refused |

IF Q3=1 THEN READ "When we ask about a current job, please talk about the one where you typically work the most hours a week."

[ASK Q4 IF Q2=2, OTHERWISE SKIP TO Q5]

4. Would you prefer to have a full-time job? (n=68)

|       |                     |
|-------|---------------------|
| 36.1% | Yes                 |
| 50.7% | No                  |
| 13.3% | Depends             |
| 0.0%  | Don't know/ Refused |

5. Are you currently working in a permanent position or one that is temporary, contract, or seasonal?

|       |                        |
|-------|------------------------|
| 81.8% | Permanent              |
| 7.0%  | Temporary, or seasonal |
| 7.9%  | Contract               |
| 3.2%  | Don't know/ Refused    |

[ASK Q6 IF Q5= 2 OR 3, OTHERWISE SKIP]

6. Would you prefer to have a permanent position? (n=41)

|       |                     |
|-------|---------------------|
| 40.6% | Yes                 |
| 20.0% | No                  |
| 32.6% | Depends             |
| 6.8%  | Don't know/ Refused |

7. Were your scheduled working hours reduced over the course of the pandemic?

|       |                                                                          |
|-------|--------------------------------------------------------------------------|
| 18.3% | Yes, my hours were moderately reduced                                    |
| 11.7% | Yes, my hours were severely reduced                                      |
| 66.9% | My scheduled work hours were not reduced over the course of the pandemic |
| 3.1%  | Don't know/ Refused                                                      |

8. Does your employer pay for healthcare benefits for you and your family?

|       |                           |
|-------|---------------------------|
| 37.2% | Yes, but just for myself  |
| 28.5% | Yes, for me and my family |



|       |                     |
|-------|---------------------|
| 31.3% | No                  |
| 3.0%  | Don't know/ Refused |

9. What industry are you currently working in?

|       |                                                                                     |
|-------|-------------------------------------------------------------------------------------|
| 13.8% | Technology or Information & Communications Technologies                             |
| 13.5% | Education                                                                           |
| 13.4% | Healthcare (including Dental)                                                       |
| 6.5%  | Professional or Business Services                                                   |
| 6.5%  | Finance, Business, Insurance, or Real Estate                                        |
| 5.4%  | Retail or Food Service                                                              |
| 5.0%  | Public Sector                                                                       |
| 5.0%  | Manufacturing                                                                       |
| 5.0%  | Non-Profit                                                                          |
| 4.0%  | Construction (Building & Design)                                                    |
| 3.9%  | Criminal Justice and Fire Technology                                                |
| 3.1%  | Childcare Services                                                                  |
| 1.9%  | Human services (such as addiction treatment services, family service workers, etc.) |
| 1.8%  | Automotive Technology                                                               |
| 24.7% | Other                                                                               |
| 0.4%  | Don't know/ Refused                                                                 |

10. What is your occupation or positional title?

*See verbatim responses.*

## II. Unemployment Profile

[ASK Q11 IF Q2 = 3 OR 4, OTHERWISE SKIP TO Q16]

11. Which of the following descriptions is closest to your current situation? (n=77)

|       |                                                                    |
|-------|--------------------------------------------------------------------|
| 51.4% | Retired and no longer looking for paid employment                  |
| 15.3% | Unemployed (includes those looking for work and those not looking) |
| 9.9%  | Laid-off because of COVID-19 Pandemic                              |
| 7.4%  | Homemaker or stay at home parent                                   |
| 4.1%  | Furloughed because of COVID-19 Pandemic                            |
| 2.0%  | Part-time student who is not looking for paid employment           |
| 9.9%  | Other                                                              |
| 0.0%  | Don't know/ Refused                                                |

[ASK Q12 IF Q11 = 5, OTHERWISE SKIP]

12. Do you hope to return to your previous job once the COVID-19 Pandemic is under control? (n=3)

|        |                     |
|--------|---------------------|
| 100.0% | Yes                 |
| 0.0%   | No                  |
| 0.0%   | Don't know/ Refused |

13. How long have you been out of work? (n=77)

|       |                                       |
|-------|---------------------------------------|
| 2.2%  | Up to 4 weeks                         |
| 4.1%  | More than 4 weeks and up to 12 weeks  |
| 4.1%  | More than 12 weeks and up to 6 months |
| 11.0% | More than 6 months and up to 1 year   |
| 73.5% | More than 1 year                      |
| 5.1%  | Don't know/ Refused                   |

14. Will you be looking for a new job within the next 3-4 months? (n=193)

|       |                     |
|-------|---------------------|
| 28.5% | Yes                 |
| 58.4% | No                  |
| 13.1% | Don't know/ Refused |

[ASK Q15 IF Q14 = 1 OTHERWISE SKIP]

15. Will this job be similar to the job you had most recently? (n=51)

|       |                     |
|-------|---------------------|
| 60.8% | Yes                 |
| 24.0% | No                  |
| 15.3% | Don't know/ Refused |

### III. Childcare Assessment

16. Are there any children 18 years of age or younger that live in your household?

|       |     |
|-------|-----|
| 28.4% | Yes |
| 71.6% | No  |

[IF Q16 = 2 OR 3 SKIP TO Q26]

17. Do any of the children in your household require adult supervision when they are at home? (n=129)

|       |     |
|-------|-----|
| 71.5% | Yes |
| 28.5% | No  |

[IF Q17 = 2 OR 3 SKIP TO Q26]

18. Due to virtual schooling or closure of childcare centers due to COVID-19, did an adult take new or additional responsibility for supervising one or more children in the household? (n=87)

|       |     |
|-------|-----|
| 78.9% | Yes |
| 21.1% | No  |

[IF Q18 = 'NO,' SKIP TO Q22]

19. To supervise the child or children, did the adult have to change their work schedule or did it affect their ability to work? (n=68)

|       |                                           |
|-------|-------------------------------------------|
| 41.7% | Yes, an adult altered their work schedule |
| 13.3% | Yes, an adult reduced their work schedule |
| 24.8% | Yes, an adult left their job              |
| 11.4% | No                                        |
| 7.7%  | Other                                     |
| 1.1%  | Don't know/ Refused                       |

[ASK Q20 IF Q19 = 'YES,' OTHERWISE SKIP]

20. How long did these disruptions to work schedules last? (n=60)

|       |                                                                            |
|-------|----------------------------------------------------------------------------|
| 1.0%  | Less than one month                                                        |
| 6.3%  | One to three months                                                        |
| 5.7%  | Three to six months                                                        |
| 31.5% | Six months to a year                                                       |
| 55.5% | The supervising adult's work schedule or ability to work is still affected |
| 0.0%  | Don't know/ Refused                                                        |

21. Was the adult who primarily supervised children during working hours a man, woman, or gender non-binary?

|       |                     |
|-------|---------------------|
| 20.6% | Man                 |
| 74.5% | Woman               |
| 1.6%  | Non-binary          |
| 3.3%  | Don't know/ Refused |

22. Over the course of the pandemic, was your household able to access childcare when desired?

|       |                                 |
|-------|---------------------------------|
| 22.6% | Yes                             |
| 23.9% | No                              |
| 52.7% | Was not interested in childcare |
| 0.8%  | Don't know/ Refused             |

[IF Q22 = 3, SKIP TO Q26]

23. Please tell us about your satisfaction with various characteristics of the current state of childcare in your community (n=58):

|                                                                        | <b>Very satisfied</b> | <b>Somewhat Satisfied</b> | <b>Neither satisfied nor dissatisfied</b> | <b>Somewhat unsatisfied</b> | <b>Very unsatisfied</b> | <b>Don't know/ Refused</b> |
|------------------------------------------------------------------------|-----------------------|---------------------------|-------------------------------------------|-----------------------------|-------------------------|----------------------------|
| A. affordability of childcare in your community                        | 15.8%                 | 23.9%                     | 11.8%                                     | 16.8%                       | 28.8%                   | 2.9%                       |
| B. quality of childcare in your community                              | 31.0%                 | 22.9%                     | 19.4%                                     | 13.8%                       | 10.0%                   | 2.9%                       |
| C. distance to childcare in your community                             | 33.6%                 | 17.4%                     | 28.3%                                     | 8.9%                        | 8.2%                    | 3.7%                       |
| D. availability of childcare during hours of the day when it is needed | 27.0%                 | 21.5%                     | 22.0%                                     | 13.1%                       | 13.5%                   | 2.9%                       |
| E. number of childcare options in your community                       | 15.0%                 | 26.5%                     | 15.9%                                     | 20.7%                       | 14.2%                   | 7.7%                       |

24. What challenges have you faced when considering childcare during the pandemic? [SELECT ALL THAT APPLY]

|       |                                                               |
|-------|---------------------------------------------------------------|
| 2.9%  | Childcare is/was too far away from where I live               |
| 21.0% | Childcare is/was not available during the times it was needed |
| 22.2% | Childcare options are/were not safe and reliable              |
| 31.0% | Childcare options are/were not affordable                     |
| 55.3% | COVID-19 related concerns about childcare                     |
| 13.9% | Don't know/ Refused                                           |

25. Did your household experience any other challenges related to childcare over the course of the pandemic?

*See verbatim responses.*

#### IV. Economic Prospects

Next, we would like to ask a few brief questions about your career preferences.

26. Has there been specific careers or positions that you wanted to find employment in that needed education or training beyond High School, if yes please identify the career or position?

|       |                                                                                                                           |
|-------|---------------------------------------------------------------------------------------------------------------------------|
| 51.3% | Yes                                                                                                                       |
| 35.6% | No, there has not been a specific career or position that I wanted that required education or training beyond high school |
| 13.1% | Don't know/ Refused                                                                                                       |

[IF Q26 = 2 OR 3 SKIP TO Q28]

27. Are you currently working in that career or position, or do you expect to in the future? (n=245)

|       |                                                                       |
|-------|-----------------------------------------------------------------------|
| 37.4% | Yes, I am currently working in that field                             |
| 15.5% | Yes, I expect to be working in that field in the future               |
| 26.8% | No, I am not working in that field and do not expect to in the future |
| 19.1% | Not sure if I will be working in that field in the future             |
| 1.2%  | Don't know/ Refused                                                   |

28. What has been the biggest challenge in getting employed in the career or positions that you are interested in?

|       |                                                             |
|-------|-------------------------------------------------------------|
| 33.2% | None, I have the career or position that I am interested in |
| 14.7% | Finding employment opportunities                            |
| 12.1% | Getting the right degree or formal educational background   |
| 9.8%  | Getting work or industry experience                         |
| 5.5%  | Meeting or getting in contact with those that could hire me |
| 2.1%  | Developing a good resume or interview                       |
| 1.8%  | Getting to work, transportation                             |
| 1.5%  | Finding or paying for daycare                               |
| 13.1% | Other:                                                      |
| 6.1%  | Don't know/ Refused                                         |

29. Has the COVID-19 pandemic made you more or less likely to continue your education?

|       |                      |
|-------|----------------------|
| 6.9%  | Much more likely     |
| 10.9% | Somewhat more likely |
| 63.9% | No change            |
| 7.6%  | Somewhat less likely |
| 6.6%  | Much less likely     |
| 4.1%  | Don't know/ Refused  |

30. Do you feel job opportunities in Santa Barbara County over the next 3 to 5 years for people like yourself will get better, stay the same, or get worse?

|       |                     |
|-------|---------------------|
| 19.9% | Get better          |
| 42.9% | Stay the same       |
| 24.6% | Get worse           |
| 12.6% | Don't know/ Refused |

31. Do you feel job opportunities in Santa Barbara County for your children or the next generation, will get better, stay the same or get worse?

|       |                     |
|-------|---------------------|
| 20.8% | Get better          |
| 20.7% | Stay the same       |
| 41.0% | Get worse           |
| 17.5% | Don't know/ Refused |

32. Did anyone in your household receive stimulus checks from the CARES Act?

|       |                     |
|-------|---------------------|
| 60.1% | Yes                 |
| 28.5% | No                  |
| 8.2%  | Not sure            |
| 3.1%  | Don't know/ Refused |

33. If your household received an unexpected bill of \$500, what impact would it have on your household?

|       |                                   |
|-------|-----------------------------------|
| 38.0% | It would have little to no impact |
| 24.6% | It would have considerable impact |
| 34.5% | It would have some impact         |
| 3.0%  | Don't know/ Refused               |

34. In the last year or 12 months, have you delayed or deferred paying off expenses because of the impact it would have on your monthly household budget?

|       |                     |
|-------|---------------------|
| 32.7% | Yes                 |
| 63.1% | No                  |
| 4.2%  | Don't know/ Refused |

35. What is your biggest concern about your household's current financial situation? [DO NOT READ, ALLOW TWO RESPONSE]

|       |                                |
|-------|--------------------------------|
| 23.9% | No concern                     |
| 22.1% | Housing costs are too high     |
| 14.0% | Not enough savings             |
| 12.5% | Household income is too low    |
| 10.2% | Medical costs are too high     |
| 3.7%  | Educational costs are too high |

|      |                                   |
|------|-----------------------------------|
| 1.5% | Transportation costs are too high |
| 4.7% | Employment is too uncertain       |
| 2.4% | Don't know/ Refused               |
| 5.1% | Other:                            |

**To wrap things up, we just have a few background questions for statistical purposes only.**

SC. What is the last grade you completed in school?

|       |                                                                 |
|-------|-----------------------------------------------------------------|
| 1.6%  | Less than high school                                           |
| 10.9% | High school diploma or GED                                      |
| 20.3% | Some college                                                    |
| 8.9%  | Post high school certificate or Associate Degree (A.A. or A.S.) |
| 33.5% | Four-year Bachelor's Degree (B.A. or B.S.)                      |
| 24.5% | Graduate school (M.S., MBA, M.A., Ph.D, M.D., J.D...)           |
| 0.3%  | Don't know/Refused                                              |

SD. Are there any languages spoken in your home other than English? (If yes, which ones?)

|       |                     |
|-------|---------------------|
| 21.3% | Yes                 |
| 77.1% | No                  |
| 1.5%  | Don't know/ Refused |

SE. What ethnic group do you consider yourself a part of or feel closest to? (IF HESITATE, READ):

|       |                                 |
|-------|---------------------------------|
| 68.9% | White                           |
| 21.8% | Hispanic or Latinx              |
| 5.3%  | Asian                           |
| 3.2%  | Black or African American       |
| 1.9%  | American Indian/ Alaskan Native |
| 0.2%  | Pacific Islander                |
| 3.8%  | Other                           |
| 5.5%  | Don't know/ Refused             |

SF. What is your Gender?

|       |            |
|-------|------------|
| 47.6% | Male       |
| 51.5% | Female     |
| 0.9%  | Non-Binary |

SG. Do you own or rent the unit in which you live or do you neither own or rent where you currently reside?

|       |      |
|-------|------|
| 31.5% | Rent |
|-------|------|

|       |                      |
|-------|----------------------|
| 57.1% | Own                  |
| 2.0%  | Refused              |
| 9.4%  | Neither rent nor own |

SH. Including yourself, please tell me how many adults 19 years of age or older live in your household?

*See verbatim responses.*

SI. Last few questions for statistical purposes. I am going to read some income categories. Please stop me when I reach the one that best describes how much **gross** income (If needed: total amount earned without taxes taken out) **you personally** earned last year from working. (IF HESITATE, READ):

|       |                       |
|-------|-----------------------|
| 9.2%  | Below \$10,000        |
| 13.0% | \$10,001 - \$25,000   |
| 11.6% | \$25,001 - \$50,000   |
| 16.1% | \$50,001 - \$75,000   |
| 14.2% | \$75,001 - \$100,000  |
| 11.0% | \$100,001 - \$150,000 |
| 12.2% | More than \$150,000   |
| 12.8% | Don't know/ Refused   |

SJ. Now I am going to ask about the total income for your household. Please stop me when I reach the one that best describes **your total household income** before taxes from last year. (IF HESITATE, READ):

|       |                       |
|-------|-----------------------|
| 4.1%  | Below \$10,000        |
| 7.6%  | \$10,001 - \$25,000   |
| 11.3% | \$25,001 - \$50,000   |
| 11.8% | \$50,001 - \$75,000   |
| 13.3% | \$75,001 - \$100,000  |
| 18.5% | \$100,001 - \$150,000 |
| 18.3% | More than \$150,000   |
| 15.2% | Don't know/ Refused   |

**Those are all of the questions we have for you. Thank you very much for participating!**

First Name of Respondent \_\_\_\_\_

Phone \_\_\_\_\_

Date of Interview \_\_\_\_\_

Name of Interviewer \_\_\_\_\_

Time of Interview \_\_\_\_\_

Type of Interview

- 1 Online Panel (Potential)
- 2 Online email-invite from adult school (Current)
- 3 Phone (Potential)
- 4 Paper



# Appendix C: Non-Profit Organization Toplines



Santa Barbara County

Organization Survey

March 2021

Toplines

n = 40

## Santa Barbara County – Educator, Childcare, Non-Profit Organization Survey

.....

### Introduction:

[ORGANIZATIONS WITH LESS THAN 25 EMPLOYEES]

Hello, my name is \_\_\_\_\_. May I please speak to a senior manager or someone involved with staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

[ORGANIZATIONS WITH MORE THAN 25 EMPLOYEES]

Hello, my name is \_\_\_\_\_. May I please speak to someone involved in Human Resources or staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of the Santa Barbara County Workforce Development Board. They are working with the Santa Barbara Foundation and would value your participation in a brief survey about the region's talent.

**(If needed):** This survey has been commissioned by the Santa Barbara Foundation and Workforce Development Board, who are committed to supporting the County's businesses and job-seekers.

**(If needed):** The survey is being conducted by BW Research, an independent research organization, and should take approximately ten minutes of your time.

**(If needed):** Your individual responses will **not** be published; only aggregate information will be used in the reporting of the survey results.

.....

## Section 1. Screener Questions

---

- A. Are you involved in staffing or hiring decisions at your organization? (If not, could you please connect me to the appropriate person?)

|        |                                                               |
|--------|---------------------------------------------------------------|
| 100.0% | Yes, I am involved in staffing or hiring decisions at my firm |
| 0.0%   | I can connect you to the appropriate person                   |
| 0.0%   | No                                                            |
| 0.0%   | Not sure                                                      |

- B. What is the zip code of your organization's location at which you spend most of your time?

|       |         |
|-------|---------|
| 64.9% | South   |
| 21.6% | Central |
| 13.5% | North   |

- C. At the start of 2021, did your business location have two or more employees (including yourself)?

|        |     |
|--------|-----|
| 100.0% | Yes |
| 0.0%   | No  |

## Section 2. Organization Profile & Hiring Expectations

---

I'd like to begin by asking you a few general questions about your organization and your current employees. For this survey, **please only answer for your current business location**. If your organization has other locations, please do not include their data.

1. Including yourself and all full-time and part-time employees, how many **permanent** employees currently work at your location? [DO NOT ACCEPT 0 AS A RESPONSE] [IF NEEDED: THIS DOES NOT INCLUDE ANY WORKERS FURLOUGHED DUE TO COVID-19 – WE WILL ASK ABOUT THOSE EMPLOYEES LATER IN THE SURVEY]

|        |                                                          |
|--------|----------------------------------------------------------|
| 100.0% | Provided number of permanent employees                   |
| 0.0%   | We have shut-down due to COVID-19 and have not re-opened |
| 0.0%   | Don't know/Refused                                       |

2. If you currently have [INSERT Q1] full-time and part-time **permanent** employees at your location, how many more or fewer employees do you expect to have at your location 12 months from now?

|       |                                    |
|-------|------------------------------------|
| 50.0% | More                               |
| 0.0%  | Fewer                              |
| 47.5% | Same number of permanent employees |
| 2.5%  | Don't know/ Refused                |

[If amount differs by 10% or more in either direction, ask: ]

Just to confirm, you currently have \_\_\_\_ **permanent** employees and you expect to have \_\_\_\_ (more/fewer) employees, for a total of \_\_\_\_ **permanent** employees 12 months from now.

3. Including all full-time and part-time employees, how many **temporary** [IF NEEDED: this includes seasonal, contract and any other temporary employees] employees currently work at your location?

|       |                                        |
|-------|----------------------------------------|
| 57.5% | No temporary employees                 |
| 37.5% | Provided number of temporary employees |
| 5.0%  | Don't know/ Refused                    |

4. What industry or industries best describe the work your organization is engaged in? [DO NOT READ, ALLOW MULTIPLE RESPONSES].

|       |                |
|-------|----------------|
| 80.0% | Non-Profit     |
| 22.5% | Human Services |
| 10.0% | Education      |
| 2.5%  | Childcare      |
| 0.0%  | Other          |

### Section 3. COVID-19 Profile

---

Next, I want to ask a few questions about how COVID-19 has impacted your business?

5. Has COVID-19 had a negative impact on your organization?

|       |                                                                 |
|-------|-----------------------------------------------------------------|
| 10.0% | No, COVID-19 has had little to no impact on my business         |
| 62.5% | Somewhat, COVID-19 has had some negative impacts on my business |
| 17.5% | Yes, COVID-19 shut down my business, but I have since re-opened |
| 7.5%  | Yes, COVID-19 shut down my business, and I have not re-opened   |
| 2.5%  | Don't know/ Refused                                             |

6. Do you have any furloughed employees that you expect to bring back as the region re-opens? If yes, how many employees do you expect to bring back? [IF NEEDED: This would just be for your current location.]

|       |                                                                                                    |
|-------|----------------------------------------------------------------------------------------------------|
| 77.5% | No, we did not furlough any of our employees.                                                      |
| 12.5% | Yes, we furloughed employees but do not expect to bring any of them back.                          |
| 10.0% | Yes, we expect to bring back [please enter number] of furloughed employees as the region re-opens. |

7. When do you expect your organization to fully recover from the impacts of COVID-19?

|       |                                                                                       |
|-------|---------------------------------------------------------------------------------------|
| 12.5% | Our business has already fully recovered                                              |
| 30.0% | Sometime in the next few months, as people get back to work and out of the house      |
| 35.0% | Not until we have a vaccine or a treatment for COVID-19 and everyone feels safe again |
| 5.0%  | Never, COVID-19 will have a permanent impact on our business                          |
| 15.0% | Not sure when my business will fully recover                                          |
| 2.5%  | Don't know/ Refused                                                                   |

#### Section 4. General Hiring Profile

---

Next, I would like to ask you about your general talent and hiring needs.

8. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **entry-level** applicants to fill these positions.

|       |                      |
|-------|----------------------|
| 25.7% | Very difficult       |
| 48.6% | Somewhat difficult   |
| 25.7% | Not at all difficult |

[IF SELECTED '1' OR '2' AT Q8, ASK Q9, OTHERWISE SKIP]

9. What are the two biggest reasons for the hiring difficulty of entry-level applicants? [ALLOW UP TO TWO RESPONSES] (n=26)

|       |                                                                                                           |
|-------|-----------------------------------------------------------------------------------------------------------|
| 65.4% | Small applicant pool                                                                                      |
| 30.8% | Lack of experience/industry-specific knowledge                                                            |
| 15.4% | Inadequate non-technical or soft skills (problem-solving, critical thinking, communication, or team work) |
| 11.5% | Lack of technical skills/ expertise                                                                       |
| 7.7%  | Inadequate educational attainment or certifications                                                       |
| 15.4% | Other                                                                                                     |
| 3.8%  | Don't know/ Refused                                                                                       |

**RANDOMIZE**

10. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **non-entry-level/experienced** applicants to fill these positions.

|       |                |
|-------|----------------|
| 27.3% | Very difficult |
|-------|----------------|

|       |                      |
|-------|----------------------|
| 57.6% | Somewhat difficult   |
| 15.2% | Not at all difficult |

**[IF SELECTED '1' OR '2' AT Q10, ASK Q 11, OTHERWISE SKIP]**

11. What are the two biggest reasons for the reported hiring difficulty of non-entry-level/experienced applicants?  
[ALLOW UP TO TWO RESPONSES] (n=27)

|       |                                                                                                           |
|-------|-----------------------------------------------------------------------------------------------------------|
| 55.6% | Small applicant pool                                                                                      |
| 29.6% | Lack of experience/industry-specific knowledge                                                            |
| 11.1% | Lack of technical skills/ expertise                                                                       |
| 11.1% | Inadequate non-technical or soft skills (problem-solving, critical thinking, communication, or team work) |
| 7.4%  | Inadequate educational attainment or certifications                                                       |
| 14.8% | Other                                                                                                     |
| 3.7%  | Don't know/ Refused                                                                                       |

12. When a non-entry-level position becomes available in your firm, do you more often promote from within, hire from outside the company, or is it an even split between the two?

|       |                                                               |
|-------|---------------------------------------------------------------|
| 53.8% | Even split (50-50 promote from within & recruit from outside) |
| 20.5% | Recruit from outside                                          |
| 20.5% | Promote from within                                           |
| 5.1%  | Don't know/ Refused                                           |

13. How often does your business recruit individuals from outside of Santa Barbara County?

|       |                                                   |
|-------|---------------------------------------------------|
| 2.6%  | Always or Almost Always (75% to 100% of the time) |
| 10.3% | Frequently (50% to 74% of the time)               |
| 20.5% | Sometimes (25% to 49% of the time)                |
| 51.3% | Rarely (1% to 24% of the time)                    |
| 15.4% | Never (0% of the time)                            |
| 0.0%  | Don't know/ Refused                               |

14. Are there any specific occupations that you are having difficulty finding qualified applicants for?

|       |                      |
|-------|----------------------|
| 61.5% | Yes (please specify) |
| 28.2% | No                   |
| 10.3% | Don't know/ Refused  |

15. Now, we're going to present a list of issues facing the region's workforce in the coming years. Please tell me how much difficulty your organization faces in addressing each of these.

Here's the (first/next) one \_\_\_\_\_ (READ ITEM): Please tell me whether your organization has no difficulty, some difficulty, or great difficulty in dealing with this issue.

| No difficult y | Some difficult y | Great difficult y |                                                                                                                                      |
|----------------|------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| 59.5%          | 37.8%            | 2.7%              | Providing training programs so current employees are productive and stay up-to date on changing technology and industry requirements |
| 21.6%          | 35.1%            | 43.2%             | Recruiting and retaining employees who can find adequate housing within a reasonable distance from work                              |
| 32.4%          | 44.1%            | 23.5%             | Recruiting and retaining employees who can find affordable childcare within a reasonable distance from work                          |
| 30.6%          | 52.8%            | 16.7%             | Retaining valuable employees who could move up within the organization                                                               |
| 42.4%          | 42.4%            | 15.2%             | Replacing retired workers with qualified employees                                                                                   |

## Section 5. Training Providers & Hiring Channels

16. How satisfied are you with the education and training institutions in and around Santa Barbara County and their ability to provide qualified workers for your firm?

|       |                       |
|-------|-----------------------|
| 30.8% | Very satisfied        |
| 46.2% | Somewhat satisfied    |
| 15.4% | Somewhat dissatisfied |
| 0.0%  | Very dissatisfied     |
| 7.7%  | Don't know/ Refused   |

17. Where do you typically search for qualified talent when hiring for new or open positions at your company?  
**RANDOMIZE**

|       |                                                          |
|-------|----------------------------------------------------------|
| 79.5% | General online job sites (Indeed, Monster, etc.)         |
| 56.4% | Word of mouth or asking current employees to recruit     |
| 35.9% | Social media sites (Facebook, Instagram, LinkedIn, etc.) |
| 33.3% | Local community college job boards                       |
| 20.5% | Other                                                    |
| 0.0%  | Don't know/ Refused                                      |

Next I want to ask about Santa Barbara County as a place to do business for organization like yours.

18. How would you rate Santa Barbara County as a place to do business?

|       |                     |
|-------|---------------------|
| 28.2% | Excellent           |
| 35.9% | Good                |
| 25.6% | Fair                |
| 2.6%  | Poor                |
| 5.1%  | Very Poor           |
| 2.6%  | Don't know/ Refused |

19. Are there any other issues or concerns that we have not discussed today, that are currently impacting your organizations?

*See verbatim responses.*

20. Is there anything else you feel we should know to better help your organization succeed in Santa Barbara County?

*See verbatim responses.*

## Section 7. Closing Questions

---

21. May we contact you with any additional questions regarding this research?

|       |     |
|-------|-----|
| 53.8% | Yes |
| 46.2% | No  |

**Thank you for completing the survey. Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.**

- C. First and Last Name of Respondent \_\_\_\_\_
- D. Position of Respondent \_\_\_\_\_
- E. Phone of Respondent \_\_\_\_\_
- F. Email of Respondent \_\_\_\_\_
- G. Name of Company \_\_\_\_\_
- H. Company Address (including City) \_\_\_\_\_

**Those are all the questions I have.  
Thank you very much for your time.**

# Appendix D: Non-Profit & Other Businesses

## Toplines



Santa Barbara County

Organization Survey

March 2021

Toplines

n = 49

### Santa Barbara County – Overall Employer Organization Survey

.....

#### Introduction:

[ORGANIZATIONS WITH LESS THAN 25 EMPLOYEES]

Hello, my name is \_\_\_\_\_. May I please speak to a senior manager or someone involved with staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

[ORGANIZATIONS WITH MORE THAN 25 EMPLOYEES]

Hello, my name is \_\_\_\_\_. May I please speak to someone involved in Human Resources or staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of the Santa Barbara County Workforce Development Board. They are working with the Santa Barbara Foundation and would value your participation in a brief survey about the region's talent.

**(If needed):** This survey has been commissioned by the Santa Barbara Foundation and Workforce Development Board, who are committed to supporting the County's businesses and job-seekers.

**(If needed):** The survey is being conducted by BW Research, an independent research organization, and should take approximately ten minutes of your time.



**(If needed):** Your individual responses will **not** be published; only aggregate information will be used in the reporting of the survey results.

---

## Section 1. Screener Questions

---

- A. Are you involved in staffing or hiring decisions at your organization? (If not, could you please connect me to the appropriate person?)

|        |                                                               |
|--------|---------------------------------------------------------------|
| 100.0% | Yes, I am involved in staffing or hiring decisions at my firm |
| 0.0%   | I can connect you to the appropriate person                   |
| 0.0%   | No                                                            |
| 0.0%   | Not sure                                                      |

- B. What is the zip code of your organization's location at which you spend most of your time?

|       |         |
|-------|---------|
| 64.2% | South   |
| 20.8% | North   |
| 15.1% | Central |

- C. At the start of 2021, did your business location have two or more employees (including yourself)?

|        |     |
|--------|-----|
| 100.0% | Yes |
| 0.0%   | No  |

---

## Section 2. Organization Profile & Hiring Expectations

---

I'd like to begin by asking you a few general questions about your organization and your current employees. For this survey, **please only answer for your current business location**. If your organization has other locations, please do not include their data.

1. Including yourself and all full-time and part-time employees, how many **permanent** employees currently work at your location? [DO NOT ACCEPT 0 AS A RESPONSE] [IF NEEDED: THIS DOES NOT INCLUDE ANY WORKERS FURLOUGHED DUE TO COVID-19 – WE WILL ASK ABOUT THOSE EMPLOYEES LATER IN THE SURVEY]

|       |                                                          |
|-------|----------------------------------------------------------|
| 98.0% | Provided number of permanent employees                   |
| 2.0%  | We have shut-down due to COVID-19 and have not re-opened |
| 0.0%  | Don't know/Refused                                       |

2. If you currently have [INSERT Q1] full-time and part-time **permanent** employees at your location, how many more or fewer employees do you expect to have at your location 12 months from now?

|       |      |
|-------|------|
| 52.1% | More |
|-------|------|

|       |                                    |
|-------|------------------------------------|
| 2.1%  | Fewer                              |
| 43.8% | Same number of permanent employees |
| 2.1%  | Don't know/ Refused                |

[If amount differs by 10% or more in either direction, ask: ]

Just to confirm, you currently have \_\_\_\_ **permanent** employees and you expect to have \_\_\_\_ (more/fewer) employees, for a total of \_\_\_\_ **permanent** employees 12 months from now.

3. Including all full-time and part-time employees, how many **temporary** [IF NEEDED: this includes seasonal, contract and any other temporary employees] employees currently work at your location?

|       |                                        |
|-------|----------------------------------------|
| 37.5% | Provided number of temporary employees |
| 4.2%  | Don't know/ Refused                    |
| 58.3% | No temporary employees                 |

4. What industry or industries best describe the work your organization is engaged in? [DO NOT READ, ALLOW MULTIPLE RESPONSES].

|       |                |
|-------|----------------|
| 65.3% | Non-Profit     |
| 18.4% | Human Services |
| 8.2%  | Education      |
| 2.0%  | Childcare      |
| 18.4% | Other          |

### Section 3. COVID-19 Profile

---

Next, I want to ask a few questions about how COVID-19 has impacted your business?

5. Has COVID-19 had a negative impact on your organization?

|       |                                                                 |
|-------|-----------------------------------------------------------------|
| 10.2% | No, COVID-19 has had little to no impact on my business         |
| 57.1% | Somewhat, COVID-19 has had some negative impacts on my business |
| 22.4% | Yes, COVID-19 shut down my business, but I have since re-opened |
| 8.2%  | Yes, COVID-19 shut down my business, and I have not re-opened   |
| 2.0%  | Don't know/ Refused                                             |

6. Do you have any furloughed employees that you expect to bring back as the region re-opens? If yes, how many employees do you expect to bring back? [IF NEEDED: This would just be for your current location.]

|       |                                                                                                    |
|-------|----------------------------------------------------------------------------------------------------|
| 71.4% | No, we did not furlough any of our employees.                                                      |
| 10.2% | Yes, we furloughed employees but do not expect to bring any of them back.                          |
| 18.4% | Yes, we expect to bring back [please enter number] of furloughed employees as the region re-opens. |

7. When do you expect your organization to fully recover from the impacts of COVID-19?

|       |                                                                                       |
|-------|---------------------------------------------------------------------------------------|
| 12.2% | Our business has already fully recovered                                              |
| 32.7% | Sometime in the next few months, as people get back to work and out of the house      |
| 30.6% | Not until we have a vaccine or a treatment for COVID-19 and everyone feels safe again |
| 4.1%  | Never, COVID-19 will have a permanent impact on our business                          |
| 18.4% | Not sure when my business will fully recover                                          |
| 2.0%  | Don't know/ Refused                                                                   |

#### Section 4. General Hiring Profile

---

Next, I would like to ask you about your general talent and hiring needs.

8. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **entry-level** applicants to fill these positions.

|       |                      |
|-------|----------------------|
| 24.5% | Very difficult       |
| 40.8% | Somewhat difficult   |
| 22.4% | Not at all difficult |
| 12.2% | Don't know/ Refused  |

[IF SELECTED '1' OR '2' AT Q8, ASK Q9, OTHERWISE SKIP]

9. What are the two biggest reasons for the hiring difficulty of entry-level applicants? [ALLOW UP TO TWO RESPONSES] (n=32)

|       |                                                                                                           |
|-------|-----------------------------------------------------------------------------------------------------------|
| 71.9% | Small applicant pool                                                                                      |
| 28.1% | Lack of experience/industry-specific knowledge                                                            |
| 15.6% | Inadequate non-technical or soft skills (problem-solving, critical thinking, communication, or team work) |
| 9.4%  | Inadequate educational attainment or certifications                                                       |
| 9.4%  | Lack of technical skills/ expertise                                                                       |
| 12.5% | Other                                                                                                     |
| 3.1%  | Don't know/ Refused                                                                                       |

#### RANDOMIZE

10. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **non-entry-level/experienced** applicants to fill these positions.

|       |                      |
|-------|----------------------|
| 24.5% | Very difficult       |
| 42.9% | Somewhat difficult   |
| 16.3% | Not at all difficult |
| 16.3% | Don't know/ Refused  |

[IF SELECTED '1' OR '2' AT Q10, ASK Q 11, OTHERWISE SKIP]

11. What are the two biggest reasons for the reported hiring difficulty of non-entry-level/experienced applicants?  
[ALLOW UP TO TWO RESPONSES] (n=32)

|       |                                                                                                           |
|-------|-----------------------------------------------------------------------------------------------------------|
| 62.5% | Small applicant pool                                                                                      |
| 31.3% | Lack of experience/industry-specific knowledge                                                            |
| 12.5% | Inadequate non-technical or soft skills (problem-solving, critical thinking, communication, or team work) |
| 9.4%  | Lack of technical skills/ expertise                                                                       |
| 6.3%  | Inadequate educational attainment or certifications                                                       |
| 12.5% | Other                                                                                                     |
| 3.1%  | Don't know/ Refused                                                                                       |

#### RANDOMIZE

12. When a non-entry-level position becomes available in your firm, do you more often promote from within, hire from outside the company, or is it an even split between the two?

|       |                                                               |
|-------|---------------------------------------------------------------|
| 52.1% | Even split (50-50 promote from within & recruit from outside) |
| 22.9% | Promote from within                                           |
| 18.8% | Recruit from outside                                          |
| 6.3%  | Don't know/ Refused                                           |

13. How often does your business recruit individuals from outside of Santa Barbara County?

|       |                                                   |
|-------|---------------------------------------------------|
| 4.2%  | Always or Almost Always (75% to 100% of the time) |
| 8.3%  | Frequently (50% to 74% of the time)               |
| 16.7% | Sometimes (25% to 49% of the time)                |
| 47.9% | Rarely (1% to 24% of the time)                    |
| 22.9% | Never (0% of the time)                            |
| 0.0%  | Don't know/ Refused                               |

14. Are there any specific occupations that you are having difficulty finding qualified applicants for?

|       |                     |
|-------|---------------------|
| 58.3% | Yes                 |
| 33.3% | No                  |
| 8.3%  | Don't know/ Refused |

15. Now, we're going to present a list of issues facing the region's workforce in the coming years. Please tell me how much difficulty your organization faces in addressing each of these.

Here's the (first/next) one \_\_\_\_\_ (READ ITEM): Please tell me whether your organization has no difficulty, some difficulty, or great difficulty in dealing with this issue.

|               |                 |                  |                     |  |
|---------------|-----------------|------------------|---------------------|--|
| No difficulty | Some difficulty | Great difficulty | Don't know/ Refused |  |
|---------------|-----------------|------------------|---------------------|--|

|       |       |       |       |                                                                                                                                      |
|-------|-------|-------|-------|--------------------------------------------------------------------------------------------------------------------------------------|
| 58.3% | 31.3% | 4.2%  | 6.3%  | Providing training programs so current employees are productive and stay up-to date on changing technology and industry requirements |
| 22.9% | 35.4% | 37.5% | 4.2%  | Recruiting and retaining employees who can find adequate housing within a reasonable distance from work                              |
| 27.1% | 37.5% | 18.8% | 16.7% | Recruiting and retaining employees who can find affordable childcare within a reasonable distance from work                          |
| 31.3% | 41.7% | 18.8% | 8.3%  | Retaining valuable employees who could move up within the organization                                                               |
| 33.3% | 37.5% | 12.5% | 16.7% | Replacing retired workers with qualified employees                                                                                   |

## Section 5. Training Providers & Hiring Channels

---

16. How satisfied are you with the education and training institutions in and around Santa Barbara County and their ability to provide qualified workers for your firm?

|       |                       |
|-------|-----------------------|
| 29.2% | Very satisfied        |
| 43.8% | Somewhat satisfied    |
| 16.7% | Somewhat dissatisfied |
| 2.1%  | Very dissatisfied     |
| 8.3%  | Don't know/ Refused   |

17. Where do you typically search for qualified talent when hiring for new or open positions at your company?

|       |                                                          |
|-------|----------------------------------------------------------|
| 75.0% | General online job sites (Indeed, Monster, etc.)         |
| 52.1% | Word of mouth or asking current employees to recruit     |
| 39.6% | Social media sites (Facebook, Instagram, LinkedIn, etc.) |
| 33.3% | Local community college job boards                       |
| 20.8% | Other                                                    |
| 2.1%  | Don't know/ Refused                                      |

Next I want to ask about Santa Barbara County as a place to do business for organization like yours.

---

18. How would you rate Santa Barbara County as a place to do business?

|       |                     |
|-------|---------------------|
| 27.1% | Excellent           |
| 35.4% | Good                |
| 29.2% | Fair                |
| 2.1%  | Poor                |
| 4.2%  | Very Poor           |
| 2.1%  | Don't know/ Refused |

19. Are there any other issues or concerns that we have not discussed today, that are currently impacting your organizations?

*See verbatim responses.*

20. Is there anything else you feel we should know to better help your organization succeed in Santa Barbara County?

*See verbatim responses.*

## Section 7. Closing Questions

---

21. May we contact you with any additional questions regarding this research?

|       |     |
|-------|-----|
| 56.3% | Yes |
| 43.8% | No  |

**Thank you for completing the survey. Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.**

- I. First and Last Name of Respondent \_\_\_\_\_
- J. Position of Respondent \_\_\_\_\_
- K. Phone of Respondent \_\_\_\_\_
- L. Email of Respondent \_\_\_\_\_
- M. Name of Company \_\_\_\_\_
- N. Company Address (including City) \_\_\_\_\_

**Those are all the questions I have.  
Thank you very much for your time.**