



GOLETA VALLEY
CHAMBER OF COMMERCE

Goleta Economic Summit: Santa Barbara's Workforce In a Changing Economic Environment

September 17, 2009

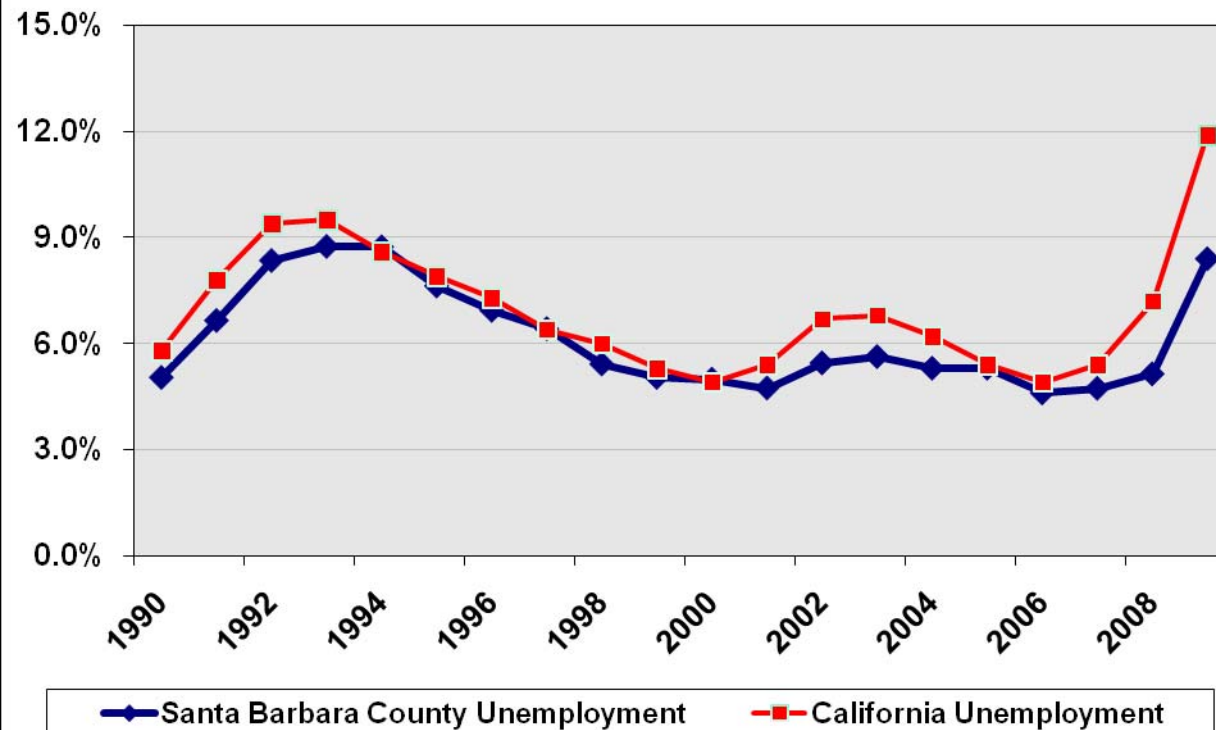
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1. Santa Barbara's Workforce & the County's Economy
2. Employer's Perspective in a Time of Change
3. What is the **Green Economy** & What Does it Mean for Santa Barbara?

Historical Unemployment

As of July 2009, **18,900** of the County's labor force of 225,200 were **unemployed**.



Comparatives:

Santa Barbara County
8.3% / 8.4%

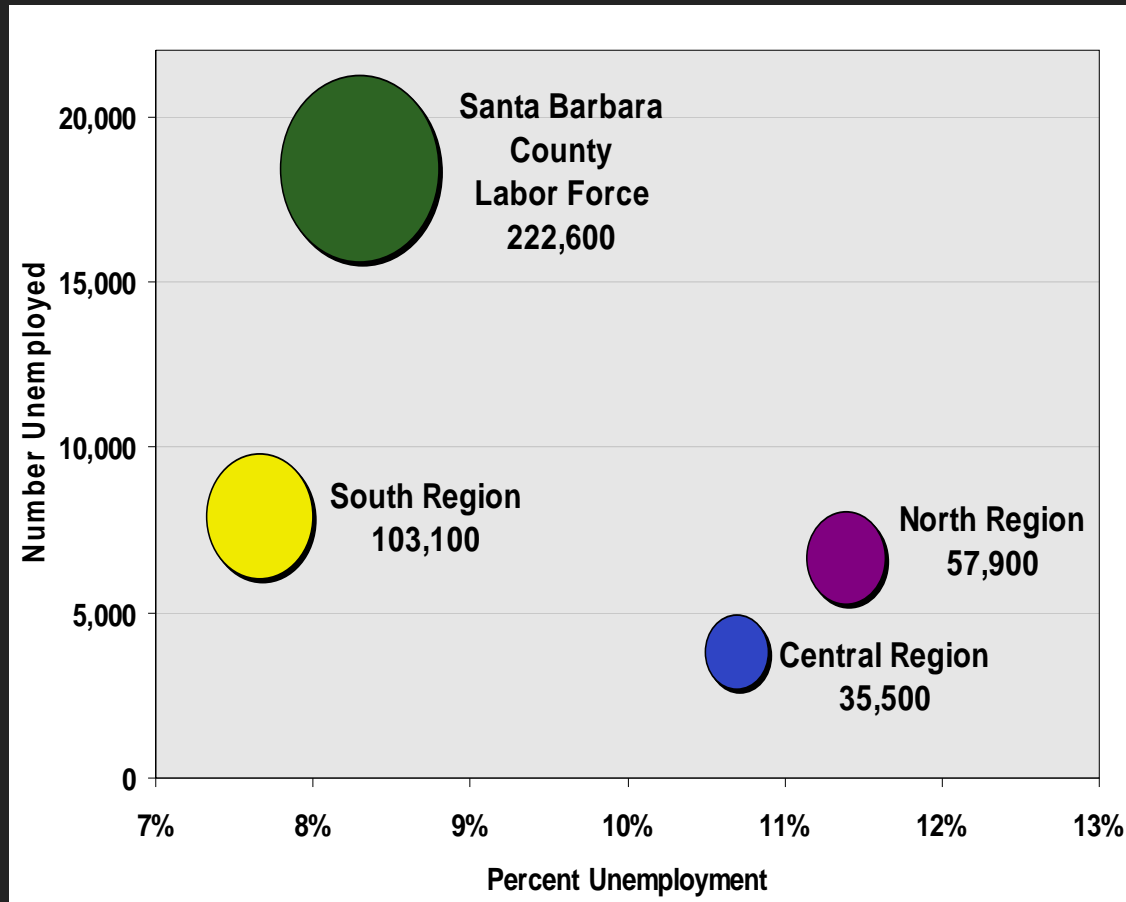
San Luis Obispo County
8.1% / 9.5%

Ventura County
9.2% / 10.9%

California
10.9% / 11.9%

Source: CA EDD LMID

Santa Barbara County Labor Force: February 2009



Highest Unemployment:

Montecito CDP

20.9% unemployment
1,200 unemployed

Isla Vista CDP

19.3% unemployment
2,400 unemployed

Lompoc City

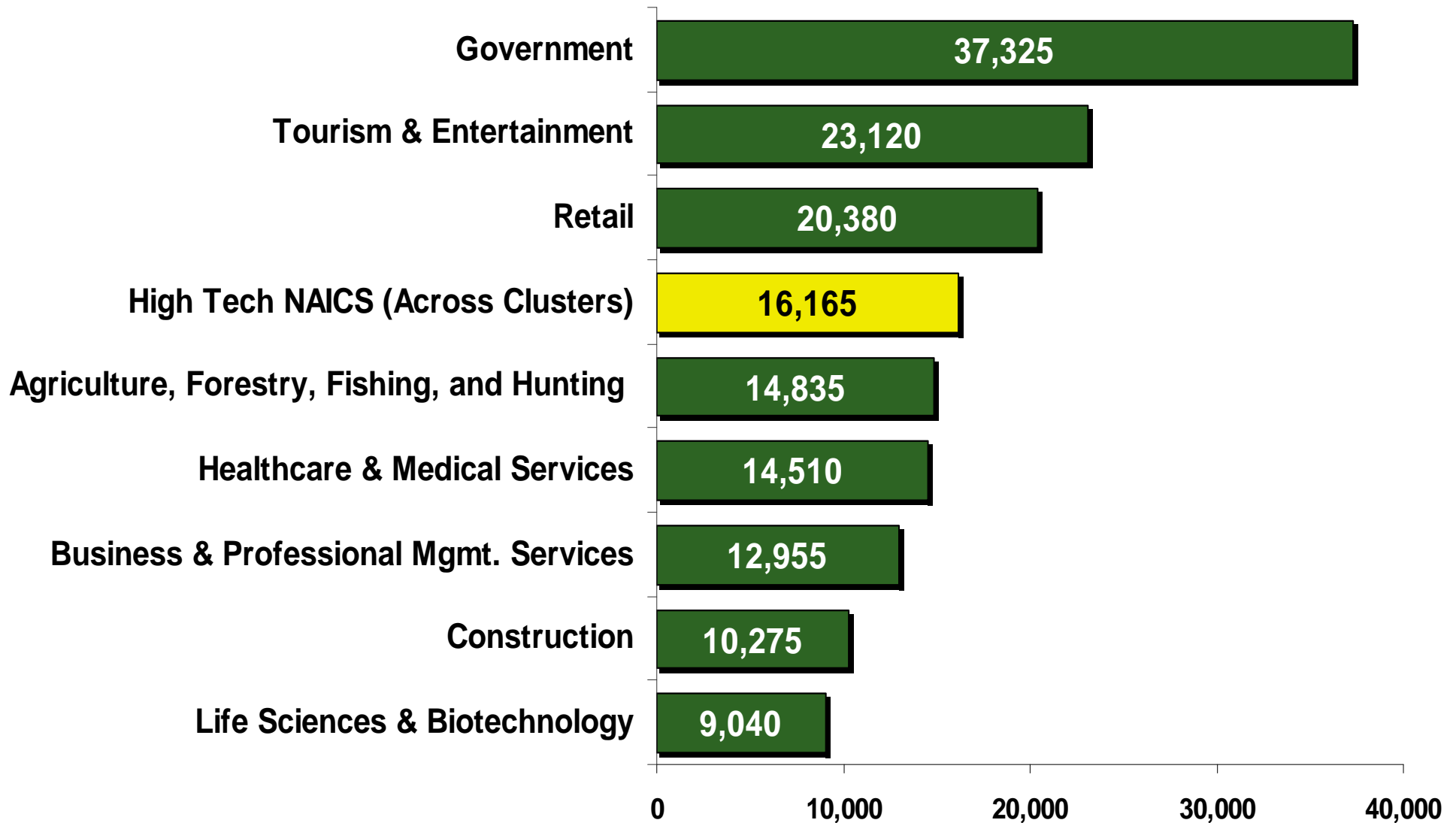
14.8% unemployment
3,000 unemployed

Santa Maria City

13.1% unemployment
5,400 unemployed

CDP: Census Designated Place
Source: CA EDD LMID, February 2009
Data

Largest Industry Clusters



Source: Moody's Economy.com December 2008 Employment Data

2005 - 2008: Industry Clusters Hardest Hit

	Jobs Lost	Percent Decline
Agriculture, Forestry, Fishing and Hunting	-1,950	-11.6%
Finance, Insurance & Real Estate	-620	-8.0%
Software & Computer Services	-515	-16.1%
Durable Goods Manufacturing	-425	-16.2%

Source: Moody's Economy.com Data

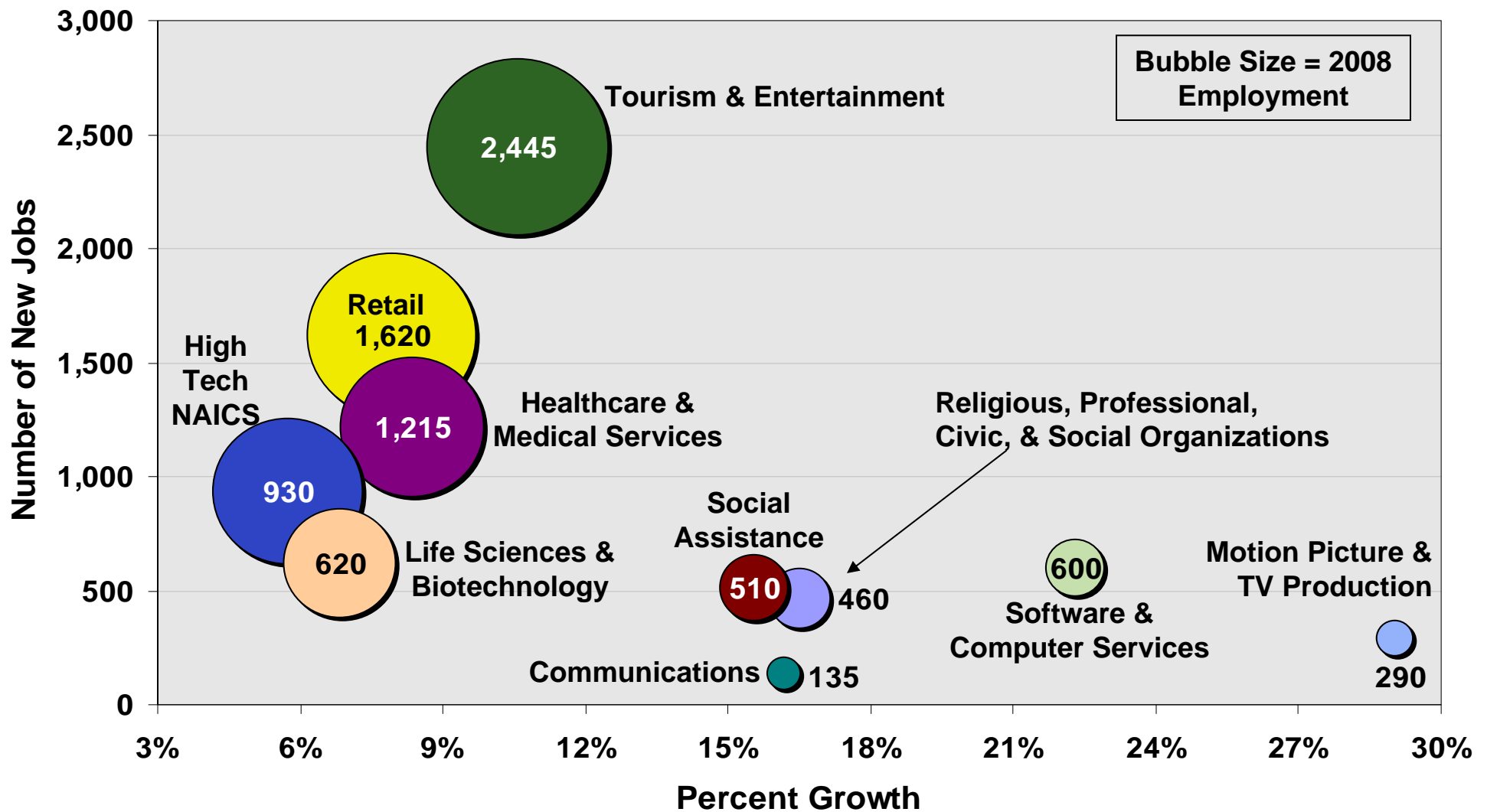
2005 - 2008: Industry Clusters that Gained

By Jobs Gained	
Healthcare & Medical Services	+1,200
Government	+945
Life Sciences & Biotechnology	+455
By Percent Increase	
Energy & the Environment	+9.7%
Healthcare & Medical Services	+9.0%
Personal Services, including Repair & Maintenance	+6.8%
Education	+6.7%

Source: Moody's Economy.com Data

Projected Growth 2008 - 2013:

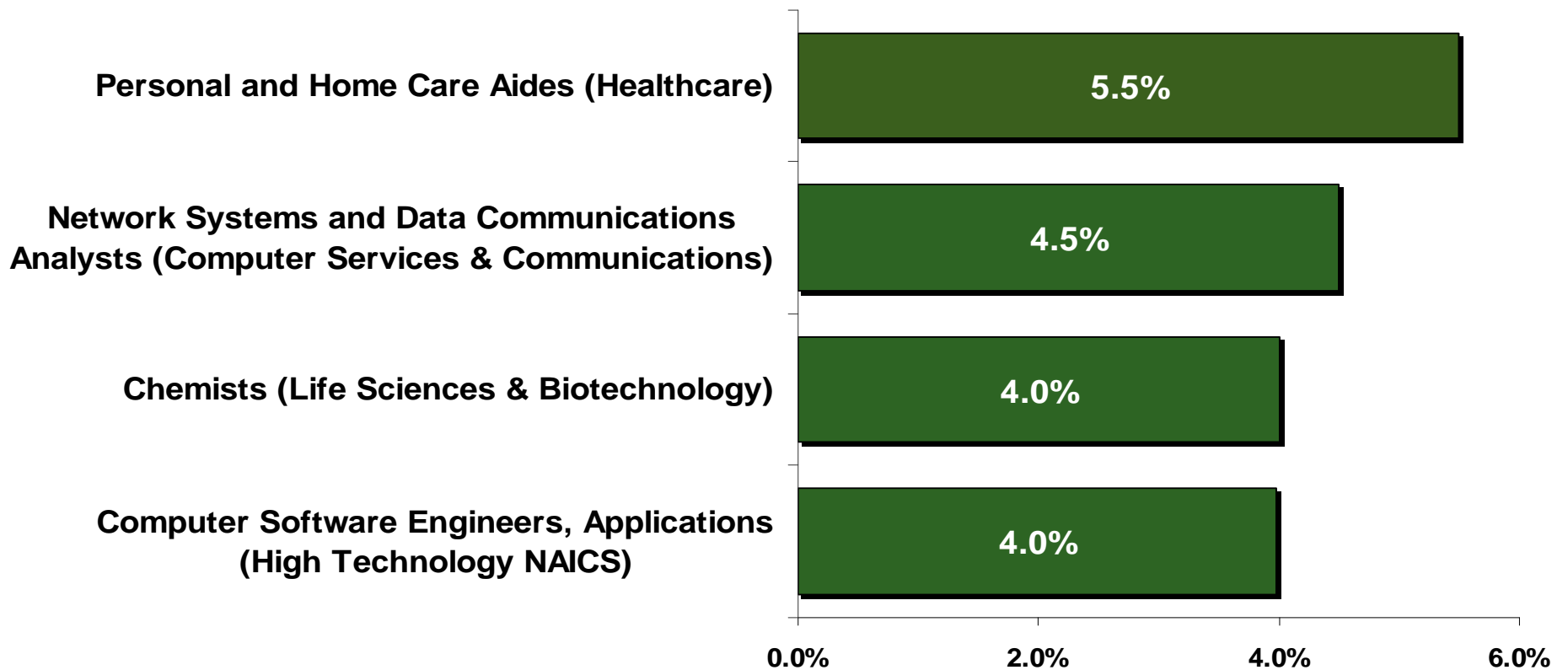
Clusters with the **Most New Jobs** or **Highest Growth %**



Source: Moody's Economy.com Data

Occupational Growth

Four out of the Five **Fastest Growing Occupations** were largely found in **Healthcare & High Technology**



Occupational Profile for Santa Barbara

Tier One Occupations

Higher paying, higher skilled occupations that typically require at least a 4 year degree.

- » **26% of occupations** with a **median wage of \$66k**
- » **Education** (7%) & **Management** (5%) occupations

Occupational Profile for Santa Barbara

Tier Two Occupations

Middle wage positions that typically require some formal education & training beyond high school.

- » 34% of occupations with a median wage of \$37k
- » Office & Admin. support (18%), construction (6%), install, maintain & repair (3%) and healthcare support (3%)

Key occupations include:

- Office clerks & administrative assistants
- Carpenters
- Maintenance & repair workers
- Medical assistants

Occupational Profile for Santa Barbara

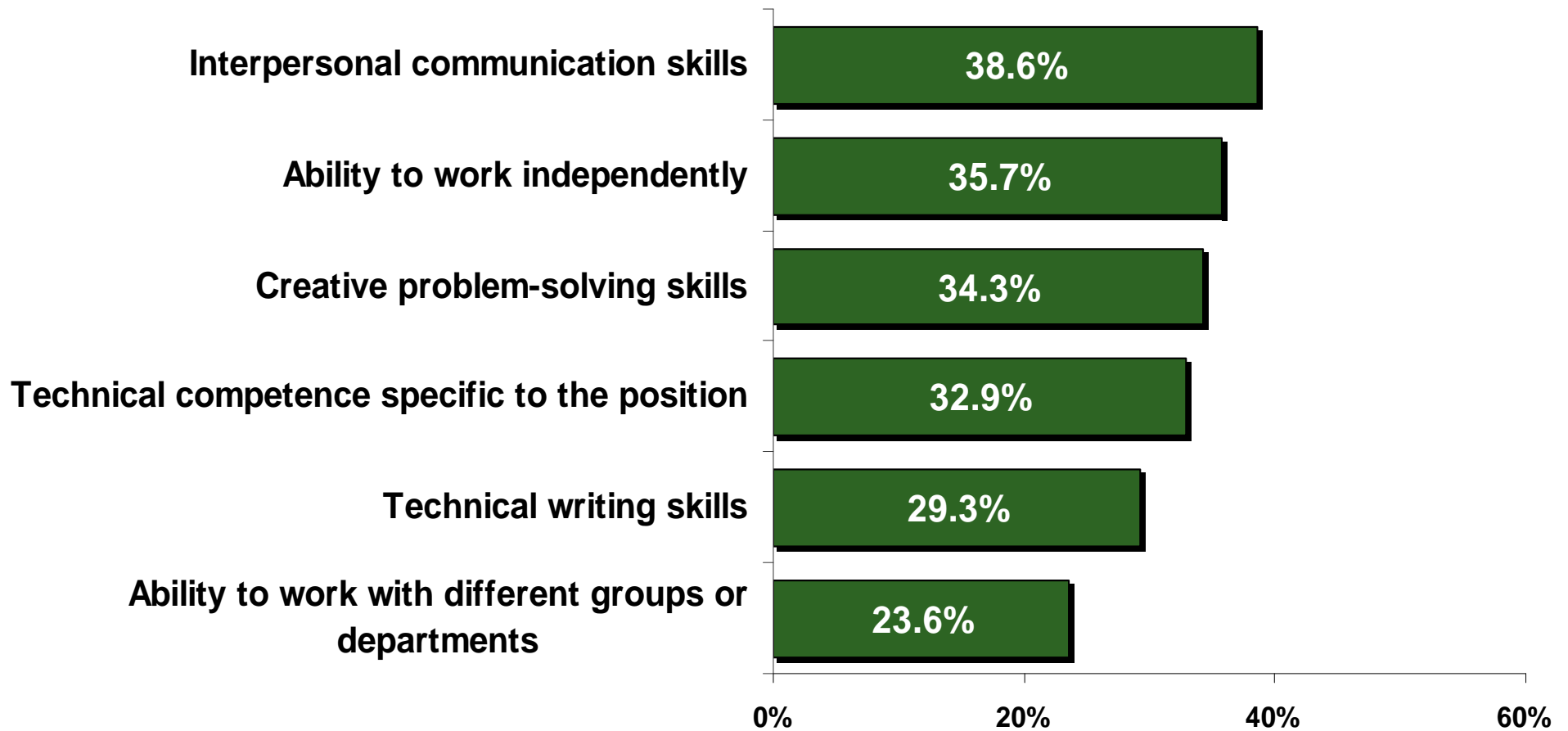
Tier Three Occupations

Low wage positions that typically require little to no formal education & training beyond high school.

- » **41% of occupations** with a **median wage of \$23k**
- » **Food service & preparation (11%) & Sales/Retail (11%)** occupations

Employer Survey: Skill Deficiencies

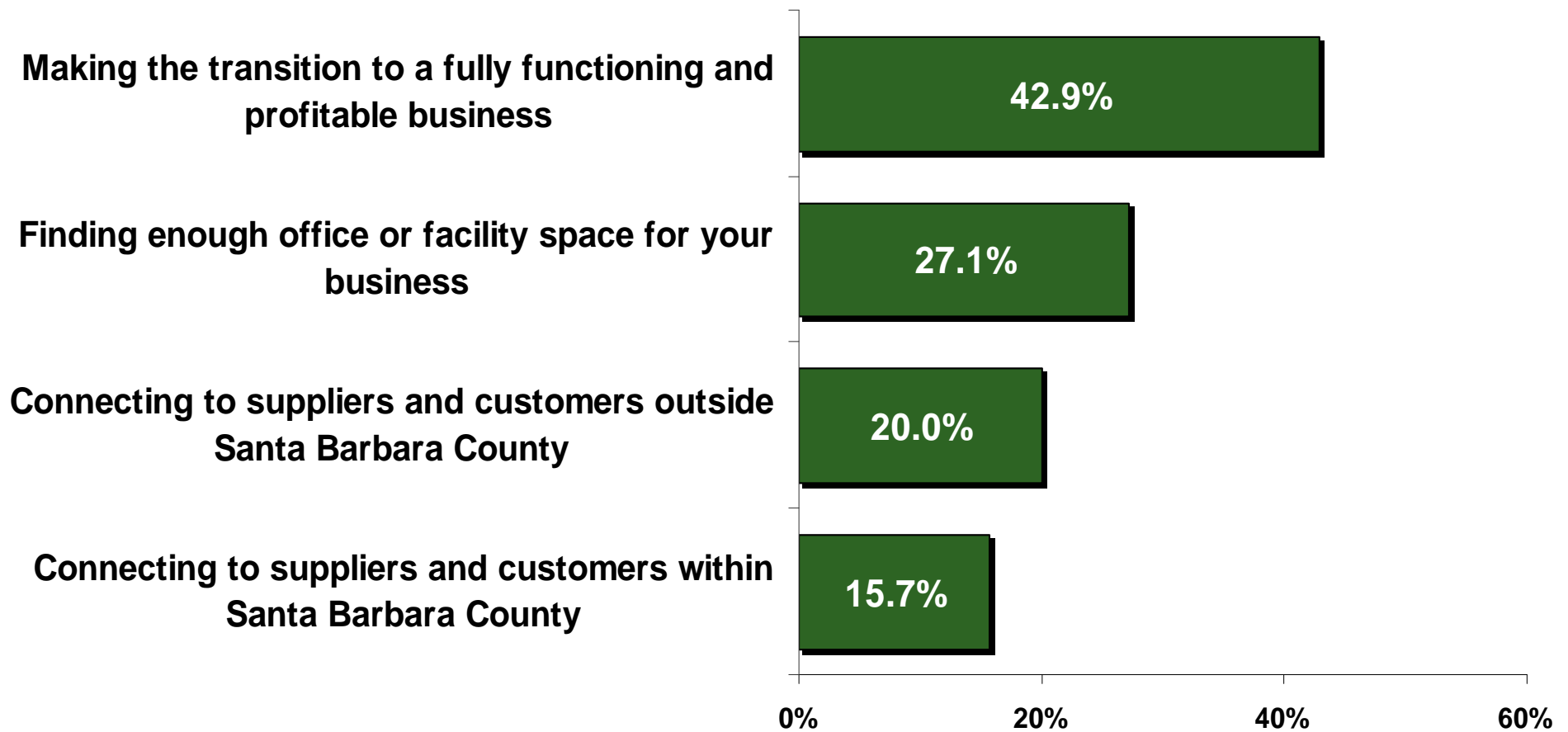
General skills new hires tend to be **most deficient** in:



Source: BW Research Santa Barbara County Employer Survey (n=140)

Employer Survey: Current Challenges

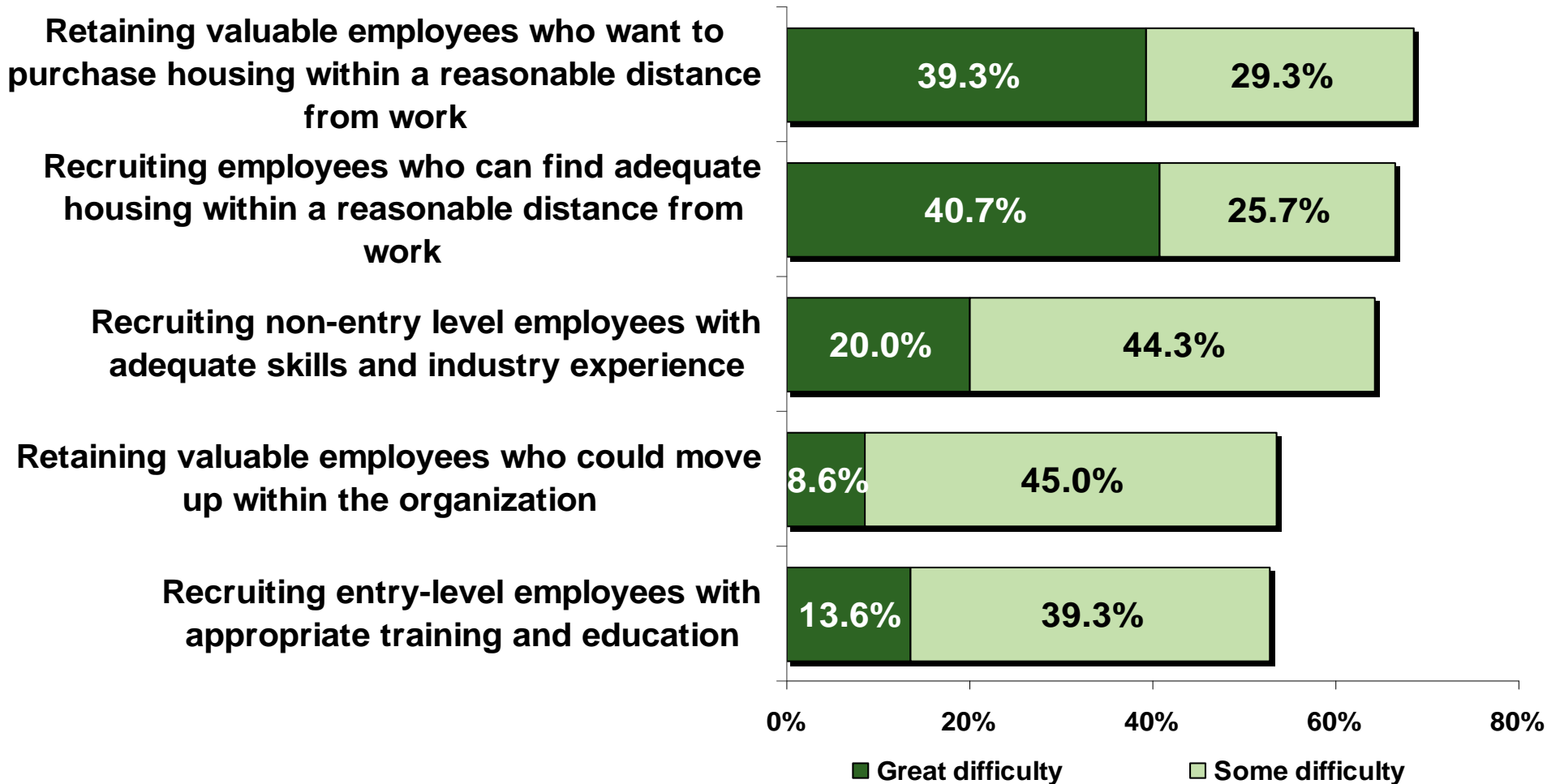
Percentage of firms with at least **some difficulty**:



Source: BW Research Santa Barbara County Employer Survey (n=140)

Employer Survey: Workforce Needs

The majority of **employers expressed difficulty** with:



Source: BW Research Santa Barbara County Survey (n=140)

Workforce Challenges & Opportunities

- **Skill Building:** Partnering with education for faster, flexible adult education programs
- **Supporting Entrepreneurship & Self-Employment:** Small Emerging Businesses are key source of new jobs in the region
- **Industry cluster strategies and partnerships** are critical for effective workforce and economic development

What is the **Green Economy**?

GREEN or **CLEAN** is any activity or service that performs at least one of the following:

- **Generating and storing renewable energy;**
- **Recycling existing materials;**
- **Energy efficient product manufacturing distribution, construction, installation and maintenance;**
- **Education, compliance and awareness;**
- **Natural and sustainable product manufacturing.**

Green Economy (continued)

From a workforce perspective, the **Green Economy** spans all levels of education and skill sets including those used for:

- **Research and development of alternative energies**
- **Building new efficient homes and facilities**
- **Operating cleaner, more efficient utilities**

*39% of the 140 Santa Barbara County firms surveyed indicated that **clean or green products or services** accounted for at least 25 percent of their firm's current or future business revenue plan.*

Green Opportunities in Santa Barbara

Green Workforce Opportunities

Energy & Technology

Renewable Energy (wind, solar, geothermal)

Energy Efficiency

Energy Storage & Transportation

Building & Design

Architecture & Engineering

Construction

Building Materials

Products & Materials

Agriculture

Electronics

Research

Public Sector & Utilities

Planning

Water & Wastewater

Recycling & Waste

Examples of Re-Skilling into **Green Jobs**

Green Occupation	Re-Skilling Occupations
Energy Auditors, Commercial and Residential	Construction Managers Loan Officers Loan Interviewers and Clerks Management Analysts Real Estate Brokers
Insulation and Weatherization Workers	Carpenters Construction Trades, Helpers Glaziers
Solar PV Panel Installers and Technicians	Carpenters Electricians Heating and Air Conditioning Technicians/Installers Plumbers Roofers Sheet Metal Workers

The Green Workforce in Santa Barbara

- **Industry Profile:** Santa Barbara's concentration in scientific research organizations, engineering & architecture services and agriculture are industries with substantial green jobs.
- **Diversity of Training & Skills Development:** No single occupation or industry is likely to dominate green workforce needs (solar installers) and opportunities.



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