



# **Monterey County: The Great Transition & the New World of Work**

PRODUCED FOR THE MONTEREY COUNTY WORKFORCE DEVELOPMENT BOARD

**November 2022**

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## Introduction

The Monterey County Workforce Development Board partnered with BW Research to evaluate how labor force participation and the world of work is changing in the region and the impact it could have on the county. The research examined the broader national and international labor force participation trends and what they mean for Monterey County. Most of the study is focused squarely on Monterey County, developing a deeper understanding of how residents and workers in the county are changing their work preferences, how local businesses are being impacted, and how they could respond in the future to the evolving landscape around the world of work. Lastly, the project examines how Monterey County could be impacted by these workforce changes in the future and some potential strategies to support both workers and businesses throughout the region.

To complete the study, BW Research completed an extensive analysis of labor market research of Monterey County, California, the U.S., and across the globe. The research also included executive interviews with leaders and stakeholders from the county, a stratified and random survey of Monterey County resident adults, and a qualitative survey of Monterey County businesses.

The report is organized into the following sections that are meant to tell the story of labor force participation and the evolving world of work in Monterey County.

- **Executive Summary** – Begins the discussion of the Labor Force Participation Rate (LFPR), its importance in the regional economy, and some of the myths that have begun to grow around it. The executive summary also includes the key findings from the study, and the recommendations for the Monterey County Workforce Development Board, based on the research findings.
- **Part 1: Examining LFPR and the New World of Work** – Examines the broader trends that have impacted the world of work across the U.S. and why it matters for regions like Monterey County.
- **Part 2: The Evolving World of Work in Monterey County** – Examines the specific data and information for Monterey County and the County’s evolving world of work.
- **Part 3: Monterey County’s Workforce Cohorts** – Examines how different groups have responded to changing work priorities over the last 3 years and what it means for Monterey County.

The end of the report also includes several appendices which provide the results of the both the resident and business surveys as well as a description of the research methodologies used in this study.

The Monterey County Workforce Development Board and BW Research would like to thank Cindy Merzon, Clint Cowden, Mayor Kimbley Craig, Kristin Horton, Norm Groot, and the individual members and staff of the Monterey County Workforce Development Board for their insights in support of this research.

# Executive Summary

## The world of work in Monterey County

The world of work in Monterey County is changing and creating new challenges for local businesses, who are trying to find qualified workers, and workers who are trying to find employment that provides them enough income to live, work, and thrive in the county. The three biggest challenges in this evolving world of work for Monterey County are connected to, one, finding enough people who are willing to work (Labor Force Participation Rate or LFPR), two, keeping enough people living in the county who are able to work (working age population), and three, developing workers in the county who are able to change jobs and develop new skills as the demand for skills and work changes over time (labor fluidity). This study examines the dynamics of this evolving world of work in Monterey County and identifies those opportunities to better support the county's businesses as they look to find and/or develop qualified workers *and* those residents that are looking to find new employment opportunities that allow them to live, work and thrive within the county.

## What is the LFPR

For too long the unemployment rate has been identified as the single most important measure of economic health within a given regional or national economy. The unemployment rate—which measures those who are looking for work and able to find work—does not include those that are not actively looking or those that have decided they no longer want to work. The last 12 months have shown us that being able to measure how many people are willing and able to work may be just as important as understanding who can find work. People's willingness and desire to work, or its more formal metric, the Labor Force Participation Rate (LFPR), is becoming an increasingly important variable in understanding the current and potential economic vitality within a region or a nation and the challenges associated with the tightening of the labor market.

### WHAT IS THE LFPR AND WHY IT MATTERS

LFPR represents the percentage of the population that is available *and* wants to work to produce goods and services, making it a key metric to determine potential economic activity. Technically, the equation for LFPR is the proportion of employed and unemployed individuals in a population that are able *and* willing to work over the total civilian non-institutionalized<sup>1</sup> working age population (16 years and older). This measure of LFPR informs us of the percentage of the working age population who want to work.

Labor force participation is critically important in every regional economy for several reasons:

- **Economic Resilience & Recovery:** As the Monterey County economy has moved out from under the challenges brought on by the pandemic, a new real challenge has emerged: the ability to find and hire qualified workers who are willing and able to work. As economic regions become more dynamic, the need for agile, available talent to support new or growing businesses only grows in importance.
- **Dependency Ratio:** From a traditional macroeconomic perspective, this has always been a central challenge of a low LFPR: too few workers who are bringing in tax revenues relative to the number of non-workers who are typically being supported by government expenditures. This can

be both a national and local problem that can lead to higher taxes, greater deficits, and/or the cutting of government support programs.

- **Long-Term Productivity of Talent:** If workers leave the labor force (stop working) and are not attending school or training programs where they are developing marketable skills for a sustained period, they can find that their ability to find comparable employment with similar wages has often declined. One example of this that has been cited is the research<sup>1</sup> that shows a pay gap between men and women and the role that leaving the workforce due to childcare needs plays in that disparity for women. It is believed that a decline in labor force participation, particularly over a longer period, can diminish labor fluidity, which is the rate at which workers move into and out of unemployment, switch jobs, and/or move to different regions for new employment opportunities.

### THREE MYTHS ABOUT LFPR

As interest in LFPR has risen, so have explanations that describe why it is declining. The following stories about labor force participation create a compelling narrative but are largely no longer supported by the evidence.

1. **The Great Resignation is driving a lower LFPR:** While this may have been true at some point during the pandemic, it is largely false now. The idea that young people are dropping out of the workforce and older people are all retiring early is largely not supported by the data. Primary working aged Americans (25 to 54 years old) had a higher labor force participation rate at the end of 2021 (82.1%) than they did 4 years earlier at the end of 2017 (81.7%). While younger adults (20 to 24 years old) saw a small decline over the same time period (71.9% in 2017 to 71.4% in 2021), older Americans (55 to 59 years old) that would be most likely to retire early, have also increased their labor participation from 2017 (56.5%) to the end of 2021 (57.1%).
2. **Declining Labor Force Participation is the same issue in every industry and every state:** However, like the impact of the pandemic, not all industries and regions are feeling the pain of reduced LFPR. Industries that typically offer lower pay and/or have a higher level of in-person customer contact have had a harder time finding workers (hospitality, retail, and parts of healthcare) compared to those industries that offer more remote work and typically provide higher wages (technology, finance, and life sciences). Examining LFPR by state, it is observed in 2022 that states like Minnesota (69%) and Nebraska (71%) have a LFPR around 70 percent, while Mississippi (53%) and West Virginia (54%) are below 55 percent.
3. **The pandemic was primarily responsible for the decline in the LFPR:** While the pandemic had an impact on how people view their work opportunities and assess their willingness to work, the overall trend in declining LFPR started long before anyone heard of COVID-19. The overall decline in LFPR is largely driven by the demographic composition of the population, the educational attainment level of our working-age population, and both the culture and support mechanisms for workers in our region and the country.

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<sup>1</sup> Source: <https://www.nytimes.com/2017/05/13/upshot/the-gender-pay-gap-is-largely-because-of-motherhood.html>

## Key Findings from the Study

- 1. The labor force participation rate in Monterey County declined by over five points from 2010 to 2021 but started to recover in 2022 as the total population in the county has declined.** As infection rates and deaths have declined, labor force participation rate has rebounded in the county to match the pre-pandemic rate, hovering around 66.9 percent. Despite this rebound, the LFPR is approximately 3 percentage points lower than it was in 2010. This has coincided with a national decline in labor force participation driven largely by an aging population. With 26 percent of the county's population under 18 years of age, there is great potential to increase the size of the labor pool once this population begins to enter working age.
- 2. Monterey County's high proportion of lower-education workers is likely weighing on labor force participation and labor fluidity within the county.** National trends show that individuals without a high school diploma are more than 25 percent less likely to be in the workforce than those with a diploma. It is also notable that educational attainment varies greatly by race and ethnicity; only 53 percent of Hispanic or Latino residents have a high school diploma or more, compared to 94 percent of the White non-Hispanic population. Improving educational attainment in the county will likely boost individual's willingness to enter the workforce, while also improving equity of opportunity within the county and improve labor fluidity.
- 3. The great transition better describes the current employment environment in Monterey County than the great resignation.** In Monterey County, overall labor force participation is starting to recover and over half of resident workers indicated they are no longer willing to work in a job they do not see a good future in, and over one-third are actively looking for a new career or industry so they can better afford to live in the county. This is consistent with national data that shows more people are changing employers and often finding higher pay as a result<sup>2</sup>. These results indicate that people are not just resigning from their jobs, but instead are looking for and in most cases finding new jobs that pay better and presumably provide a better future.
- 4. Monterey residents who have changed jobs during the pandemic (17% of respondents) tend to be younger and have lower household incomes than the overall county. Inability to find higher paid jobs for these job changers may eventually lead to moving out of the county, lowering the LFPR as more prime-working aged individuals leave the county.** These "job changers" also were disproportionately likely to have left jobs in Retail or Wholesale Trade, or Restaurants and Food Services. Most (46%) left for better pay or benefits, though more than a quarter (27%) reported also leaving for a more fulfilling career or one that is closer to their long-term goals. Fourteen percent reported leaving for better company culture. This cohort was also more likely to report that "housing costs are too high", they have "not enough savings", or that their "household income is too low."
- 5. Labor participation may also be struggling due to a mismatch in skills with available jobs: of the survey respondents who are currently unemployed but looking for work (10%), the majority are "unable to find work that fits their skills" or near where they live.** These "Potential

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<sup>2</sup> Source: [https://www.pewresearch.org/social-trends/2022/07/28/majority-of-u-s-workers-changing-jobs-are-seeing-real-wage-gains/pst\\_2022-07-28\\_labor-market\\_00-01/](https://www.pewresearch.org/social-trends/2022/07/28/majority-of-u-s-workers-changing-jobs-are-seeing-real-wage-gains/pst_2022-07-28_labor-market_00-01/)

returners” are mostly under the age of 34, are likely to have a high school education or some college and tend to have household incomes on the lower end of the distribution. Nearly a quarter (24%) are students, and 16 percent and 15 percent respectively reported they have a short-term injury or disability or are homemakers or caretakers for family members. Most (47%) expected to return within six months, but longer than two weeks.

6. **Almost half (44%) of survey respondents are working for the same employer today that they were before the pandemic. These “consistent workers” are the foundation of the county’s current workforce.** “Consistent workers” tended to be more educated, have higher household incomes, and be more in the “prime working age” range of 25 to 54 years old. As with the general population of respondents, a majority (81%) feel it is getting harder to live and work in Monterey County, and 75% feel that rent and housing costs have made it hard to live and work in their community. Given these response rates among even the highest-earning cohort, housing costs are a key impediment for most residents in the county.
7. **Potential returners—those that are currently not working but indicated they are looking for work or could at some point in the future—represented about one in ten survey respondents.** This is a key segment in thinking about how to increase the available workforce in Monterey County. The majority (61%) of respondents in this cohort, were 18 to 34 years old, were most likely to have a High School Diploma or equivalency or some college (61%) as their highest level of education and had a below average household income (54% have less than \$75,000 annual household income). The biggest employment or career challenges for this segment were “finding the right employment opportunities” and “getting work or industry experience”. Potential returners were likely to agree that the pandemic and housing costs were making harder to live and work in the county, and they were no longer willing to work in a job they did not see a good future in.

## Recommendations

BW Research presents the following recommendations to the Monterey County Workforce Development Board, based on the research findings.

### I. SHORT TERM STRATEGIES FOR THE WDB

1. **Identify and educate jobseekers and transitioning workers on career pathways in higher paying industries or higher paying occupations within their industry.** Three in ten (30%) Potential Returners do not think that their current education level will allow them to find meaningful and well-paid employment in the future. Monterey residents are hungry for career pathways that can provide them with a sustainable wage in the county. The Workforce Development Board could assist these efforts by working with employers to identify the career pathways that are available in the county and sharing this information to job seekers and potential labor market entrants. Employment opportunities in healthcare, building and construction, and information and communications technologies (ICT) all provide robust career pathways with in-demand occupations.

2. **Work with SBDC to make co-enrollment with workforce development board services a pre-requisite to access SBDC services.** Increase coordination between SBDC and workforce development board programs to link aspiring entrepreneurs to workforce resources and supports. Develop programmatic efforts around entrepreneurship to ensure support networks for small businesses and technology enablement for non-technology businesses. This is particularly relevant at this time as we have seen an increase of businesses that have died from the pandemic and an opportunity for new businesses to be born.
3. **Expand and support programs to increase digital literacy and online job-searching tools and skills among jobseekers and potential workers.** Continued resources and training through the WDB should include instruction on how to search for employment through different online sources and how to develop online tools (resumes, letters of reference, etc.) to find and apply for attractive employment options.
4. **Identify and educate jobseekers and transitioning workers on available childcare resources within their community.** Seven percent of unemployed respondents said that affordable childcare would make them more likely to start working again. Nationally, women with younger children have been the slowest to re-enter the workforce as childcare remains a challenge in the post-pandemic economy. The Workforce Development Board could work closely with childcare facilities and non-profit partners to share information with current and potential workers about costs and availability of childcare resources in the region.

## II. SHORT TERM STRATEGIES FOR MONTEREY COUNTY

1. **Expand the pool of potential workers and develop cohort specific strategies for this objective.** As unemployment rates approach the pre-pandemic lows seen in 2019, expanding the labor force is an important potential remedy for talent shortages. There are several populations that typically have lower labor force participation rates because of barriers they face. Removing those barriers may help those workers enter the workforce. **These populations include parents with young children, those with lower educational attainment, formerly incarcerated, and long-term unemployed and discouraged workers, among others.** Working to help these individuals overcome their barriers to work is the first step which will require close partnership with community-based organizations (CBOs) and other support systems. Of residents surveyed, nearly 49 percent said that getting the right degree or formal education background was a challenge when trying to advance their career. Over 34 percent of all respondents responded that finding or paying for daycare is a challenge when trying to advance their career. The second step will be attracting these individuals into the workforce. Close partnerships between CBOs and training providers may assist individuals in accessing training that is best suited to their needs and goals.
2. **Consider efforts to collaborate with and reinforce employment support services like childcare, transportation, and senior care.** Seven in ten parents with children under the age of 18 stated that it is at least somewhat difficult to find affordable quality childcare. Only eight percent of parents reported it was “not difficult to find.” Housing is also a significant factor for everyone in the county. Thirty-seven percent cited housing costs as their household’s biggest concern. Working closely, and advertising these close relationships, with these resources can be an



important attraction and retention factor for participant engagement with workforce development.

3. **Support entrepreneurship and business expansion efforts across the county.** The economic churn brought on by the pandemic is only now starting to be understood, and the death of older businesses will also provide opportunity for new and expanding businesses across the county. Supporting new businesses as they seek to expand into new markets and onboard new talent will be important in reviving the entrepreneurial activity in the county.
4. **Expand access to broadband services in homes and increase bandwidth in remote and satellite offices.** Over half (59.1%) of unemployed respondents said that a more flexible work schedule would make them more likely to start working again. The pandemic has changed how and where people work, with more people working online and remotely, at least part time, from their home. To ensure more residents have the ability to work from home and access jobs that are at least partly online, the county should bolster residential broadband while also ensuring that local offices and commercial spaces have enough bandwidth to participate in this evolving world of work.

### III. LONG TERM STRATEGIES FOR THE WDB & MONTEREY COUNTY

1. **Work with employers and educators to develop career pathway programs that allow current entry and mid-level employees to continue work and begin education and/or training programs that move them towards higher skill and higher paying positions.** The survey of workers demonstrated that Job Changers were most interested in higher wages and upward career trajectory. In a tight labor market, workers need to be able to continue working while also developing the skills and knowledge they need to move to the next rung of their career ladder. The Workforce Development Board may consider developing programs that connect current employers and workers with the training and educational providers that will allow them the flexibility to complete a certificate, a degree, or specialized training while they work. This would support a workforce that is sufficient in quantity and quality.
2. **Identify and communicate the economic and employment opportunities and success stories in Monterey County.** An overwhelming majority of both business decision makers (78%) and county residents (74%) who responded to the survey agreed it is getting harder to live and work in Monterey County. Almost half (48%) of resident respondents believe job opportunities in Monterey County for their children will “get worse” in the next generation. This sort of economic pessimism can become a self-fulfilling prophecy as younger families leave the region in search of “greener” economic pastures. To counter this pessimism, the WDB could begin to highlight the employment and economic success stories that occur in Monterey County. Sharing these success stories in online and print media may be helpful in changing the narrative around economic mobility in the region.

3. **Support efforts to increase educational attainment rates of high school diploma and certificates.** When possible, these efforts should be available with English Second-Language (ESL) components, as well as paid work or apprenticeship opportunities. The systemic lower rates of education—particularly among Hispanic or Latino residents—presents a significant barrier to labor force participation and economic advancement. Addressing this gap can simultaneously boost equity and economic vitality in the county.
4. **Support expanded housing options in work centers with better access to transit hubs across the county.** Nearly 80 percent of Potential Returners agree that rent and housing costs have made it hard to live and work in the community. The results of both the resident and business survey are clear; the lack of affordable housing is one of the most significant obstacles for regional economic development and labor force participation.

## Part 1: Examining LFPR & The New World of Work

This initial section of the study is meant to provide the foundation for a deeper understanding of the evolving world of work in Monterey County by understanding what LFPR is, what drives variability in LFPR, how LFPR is determined, and the potential effects of a low LFPR. The section also briefly examines the national and international LFPRs.

### LFPR DEFINED

LFPR represents the percentage of the population that is available **and** willing to work to produce goods and services, making it a key metric to determine potential economic activity. LFPR measures the percentage of employed and unemployed population that are able **and** willing to work—the civilian labor force—as a percentage of the civilian non-institutionalized population, that is of working age, 16 years and older (Equation 1).

#### EQUATION 1. LABOR FORCE PARTICIPATION RATE (LFPR)

$$\text{Labor Force Participation Rate (LFPR)} = \frac{\text{Labor Force (Employed and Unemployed Individuals)}}{\text{Civilian Non-Institutionalized Population (16 Years and Older)}}$$

Multiple conditions qualify an individual as an employed person, namely: they must be doing any paid or profitable work; or must complete at least 15 hours of weekly unpaid work in a family-owned business; or were temporarily absent from their regular job because of various reasons. Likewise, multiple conditions qualify an individual as unemployed, namely: must not have a job, be actively searching for employment and be available for work.

Desire for and availability to work are important distinctions between those who are in the labor force (employed and unemployed) and those who are not in the labor force (a category which includes but is not limited to unpaid family and child caregivers, students, and retirees). A change in the LFPR, therefore, signals changes in the fraction of the population that is either gainfully employed or actively seeking employment. It is vastly different from changes in measures of labor underutilization; of particular interest in this report are the unemployment rate and underemployment.

The unemployment rate—one of the most recognizable measures of underutilized labor—is the number of unemployed people as a percentage of the civilian labor force. The unemployment rate, unlike the LFPR, measures individuals who are not able to find work but are actively searching. In other words, it reflects to unavailable employment for people with the desire and availability to work but are not doing so.

On the other hand, underemployment occurs when an employed person is willing and available to work additional hours if given the opportunity to find an additional job(s) or increase their total hours of work. For example, an individual with part time employment is underemployed if they are willing and available to find another part time job or increase their hours in their current job.

## WHY LFPR MATTERS

A county, region, state, or nation with a low LFPR can experience a variety of rippling effects. At the ground level, businesses have a smaller worker pool to potentially hire new applicants from. This effect can stunt business growth, economic resilience, and recovery from challenges like the COVID-19 pandemic. The decrease of individuals in the labor force also leads to a decline in gross regional product, as there are fewer individuals producing goods and services. This is especially critical for Monterey County which has relatively large labor-intensive industries like hospitality, healthcare, and agriculture.

Low LFPR also decreases the tax base of working individuals that provide revenue for local, state, and federal government programs. A narrower tax base from which the government can pull revenue can lead to higher tax rates. Additionally, a low LFPR can potentially increase the dependency ratio i.e., the number of people of non-working age as a percentage of the civilian non-institutionalized population. The combination of higher dependency ratios and narrower tax bases could lead to an increase in the number of individuals that need social assistance programs as the non-working population increases its dependence on the working population.

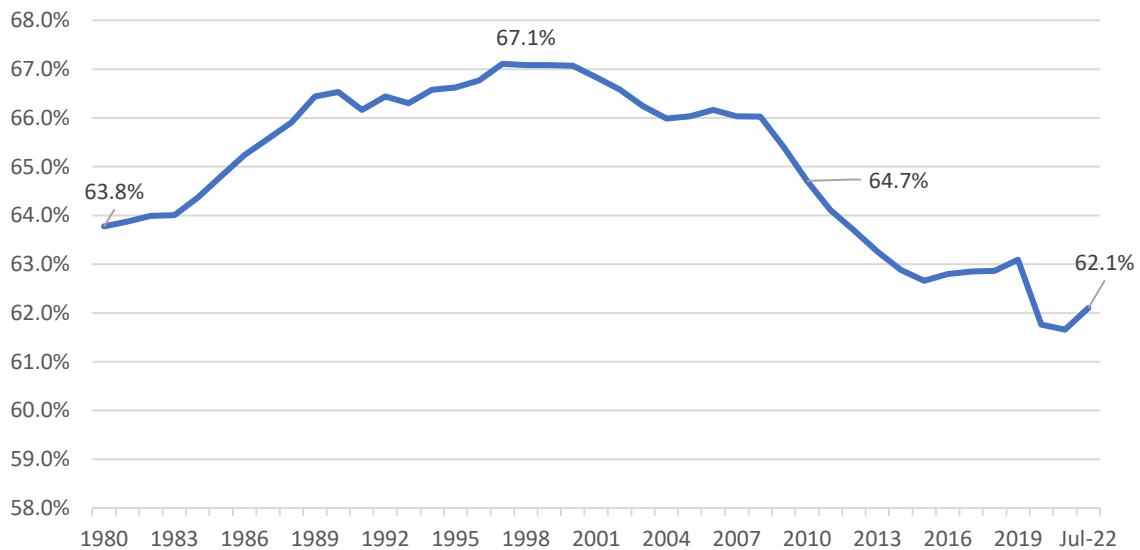
The prolonged absence of workers in the labor force can cause declines to workforce development. There are multiple reasons that may cause workers to exit the workforce which include retirement, enrollment in school, childcare, or family care. Workers who exit the workforce tend to find that their skills and abilities relevant to the workplace diminish unless they are exiting for training or education purposes.

## NATIONAL LFPR TRENDS

### National Labor Force Participation was declining long before the pandemic reached the United States.

In 1980, the annual LFPR for the U.S. was 63.8 percent and it continued to trend upward until it hit its peak at 67.1 percent in 2000. At the onset of the COVID-19 pandemic, the LFPR decreased from 63.4 percent in February 2020 to 62.7 percent in March. The U.S. LFPR began recovering after April 2020, when it hit its lowest point since 1973 (60.2%). Though the recovery began soon after the initial drop in the LFPR, it was slow—the annual LFPR was 61.8 percent in 2020 and 61.7 percent in 2021. Between June of 2020 and December of 2021, the LFPR only increased by 0.5 percent despite slackening COVID-19 restrictions. Even as of April 2022 it has not fully bounced back to pre-pandemic levels—the annual LFPR was 63.1 percent in 2019 before the pandemic started and sat at 62.2 percent in April 2022.

FIGURE 1. UNITED STATES ANNUAL LABOR FORCE PARTICIPATION RATE<sup>3</sup>

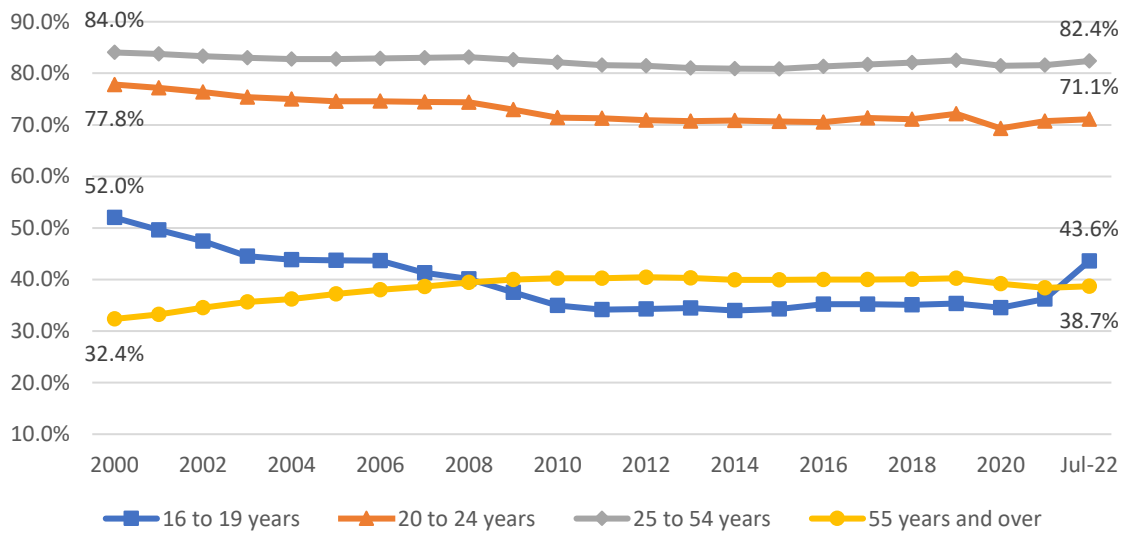


<sup>3</sup> Bureau of Labor Statistics, Labor Force Participation Rate [CIVPART], retrieved from FRED, Federal Reserve Bank of St. Louis.

## IMPACTS OF AGE ON NATIONAL LFPR

**Age plays a significant role in labor force participation; the national LFPR was highest for individuals 25 to 54 years old (82.4 percent as of April 2022).** Individuals between ages 20 and 24 had the next highest LFPR (70.4%). LFPR was lowest for individuals over 55 (38.7%) and individuals between 16 and 19 years old (34.5%), as people begin to think about retirement and postsecondary education, respectively. All age groups experienced declining LFPR between 2019 to 2020 due in large part to the pandemic. In fact, individuals who were 20 to 24 years old experienced the largest decrease of 2.8 percentage points. The LFPR for the 16 to 19-year-old cohort hit an 11-year high of 36.2 percent in 2021 but fell back to pre-pandemic levels in 2022.

FIGURE 2. UNITED STATES ANNUAL LABOR FORCE PARTICIPATION RATE BY AGE GROUP<sup>4</sup>



<sup>4</sup> Bureau of Labor Statistics: Current Population Survey (2000 to April 2022).

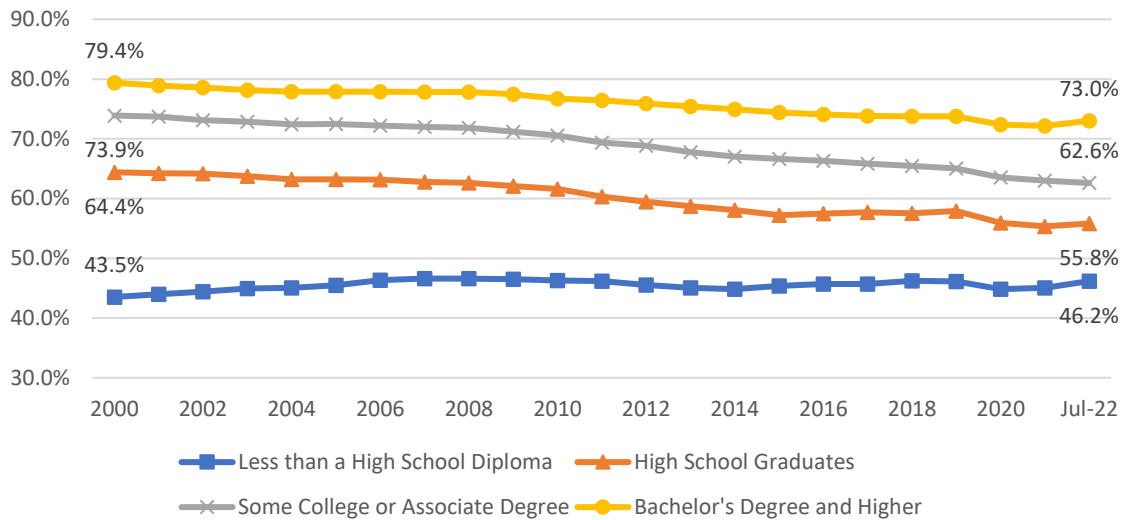
### IMPACTS OF EDUCATIONAL ATTAINMENT ON NATIONAL LFPR

**Labor force participation rates also vary among various levels of educational attainment; LFPR increases as educational attainment increases.** Individuals with a bachelor’s degree and higher historically have the highest LFPR among all the educational attainment groups in the United States. In April 2022, LFPR was 72.9 percent for those with a bachelor’s degree or higher, 63.4 percent for those with some college or an associate degree, 56.8 percent for those with a high school diploma, and 44.4 percent for those who did not complete high school.

This trend is likely driven in part by what economists refer to as “opportunity cost”, or the lost benefit of what someone could otherwise be doing. For example, someone without a high school diploma may face a decision of whether to stay at home to take care of an elderly parent or to work at a job that pays \$17 per hour, but which requires them to hire professional help for their parent at \$16 per hour. This makes taking the job an unappealing prospect. Conversely, someone with a bachelor's degree may be in the same situation but be offered a job that pays \$32 per hour, making employment look like a much more appealing option.

LFPR have been declining for all levels of educational attainment since 2000 except for those with less than a high school diploma. Individuals who completed some college or earned an associate degree have experienced the largest decline in LFPR between 2000 and 2021. Conversely, LFPR for individuals with less than a high school diploma had an average annual increase of 0.2 percent between 2000 and 2021. (Figure 3)

**FIGURE 3. UNITED STATES LABOR FORCE PARTICIPATION RATE BY EDUCATIONAL ATTAINMENT, 25 YEARS AND OVER<sup>5</sup>**



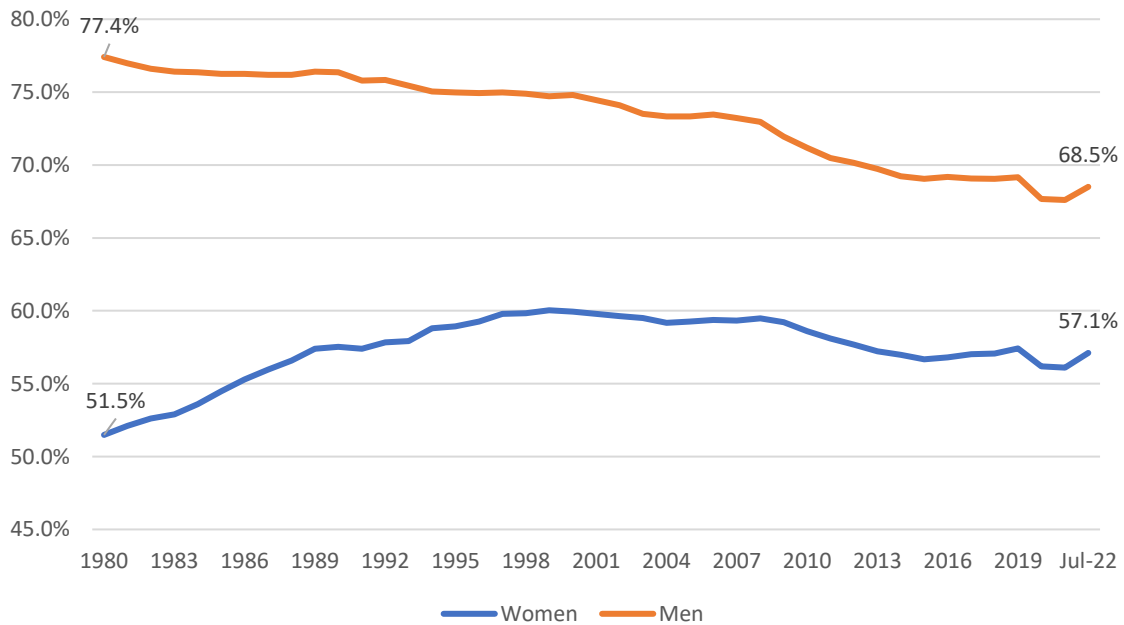
<sup>5</sup> Bureau of Labor Statistics: Current Population Survey.

### IMPACTS OF GENDER ON NATIONAL LFPR

The trend of labor force participation rates varies by gender as well; LFPR for men has trended lower since 1980, while the LFPR for women has increased since that time.

- The LFPR of men has decreased since 1980, with rates at 77 percent in 1980, 76 percent in 1990, 75 percent in 2000, 71 percent in 2010, and 68 percent in 2021.
- The LFPR among women has increased significantly between 1980 to 2000. LFPR for women in 1980 was 52 percent and had an average annual percentage increase of 0.8 percent, or an increase of 8.4 percent by 2000. Since 2000, however, LFPR among women started to decline, with an average annual decrease of 0.3 percent between 2000 to 2021.
- Though women’s LFPR has declined over the past two decades, the gap between men’s and women’s LFPR has narrowed during this time frame. As of April 2022, men’s LFPR was 67.8 percent and women’s was 56.5 percent.

FIGURE 4. UNITED STATES ANNUAL LABOR FORCE PARTICIPATION RATE BY GENDER<sup>6</sup>



<sup>6</sup> Bureau of Labor Statistics: Current Population Survey (1980 to April 2022).



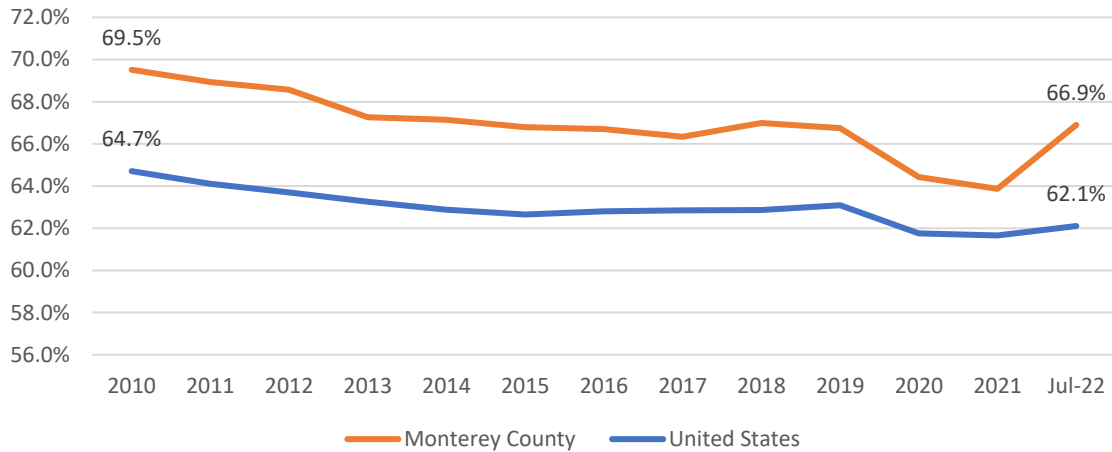
## Part 2: The Evolving World of Work in Monterey County

**Labor force participation in Monterey County has largely mirrored national trends.** As with the United States, labor force participation in Monterey County was declining well before the pandemic began. Monterey County’s annual LFPR was 69.5 percent in 2010 and steadily decreased until 2017, when it reached 66.3 percent. The annual LFPR in the county briefly increased in the years leading up to the pandemic, reaching about 67 percent in 2018 and 2019, before falling to 64.4 percent in 2020.

Monterey County’s LFPR was about 4 to 5 percent higher than U.S. LFPR for much of the last decade. It was not until the onset of the COVID-19 pandemic in 2020 that the gap began to narrow. The pandemic had a larger effect on the LFPR in Monterey County than it did on the LFPR in the United States. Between 2019 and 2020, Monterey County’s LFPR decreased by 2.3 percent, while the LFPR in the U.S. decreased by 1.3 percent. Additionally, the annual LFPR decreased by another 0.5 percent in Monterey County and 0.1 percent in the U.S. between 2020 and 2021. As of July 2022, Monterey County’s LFPR sits at almost 67 percent while the U.S. sits at about 62 percent.<sup>7</sup>

Although the effects of the pandemic impacted the county’s 2020 and 2021 LFPR, other factors, like an aging population or low educational attainment, could have contributed to its pre-pandemic decline.

FIGURE 5. MONTEREY COUNTY ANNUAL LABOR FORCE PARTICIPATION RATE<sup>8</sup>



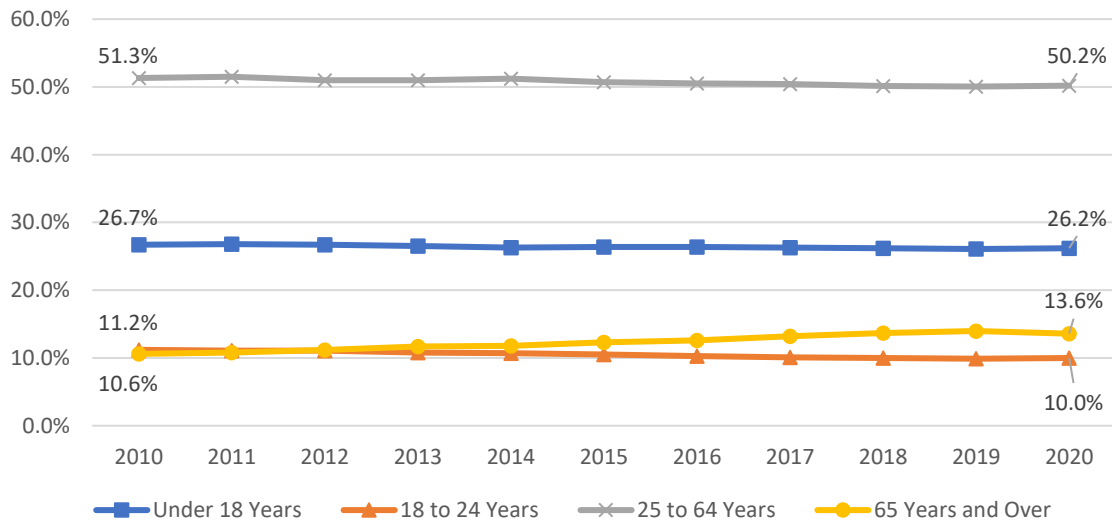
<sup>7</sup> Monterey County’s 2021 and 2022 LFPR were calculated using a three-year population growth average to determine the population in 2021 and 2022, all other population data from the American Community Survey.

<sup>8</sup> Bureau of Labor Statistics, Labor Force Participation Rate [CIVPART], retrieved from FRED, Federal Reserve Bank of St. Louis; State of California Employment Development Department, Monterey County Historical Civilian Labor Force; Bureau of Labor Statistics: ACS 5-Year Estimates, 2010-2020.

IMPACTS OF AGE ON MONTEREY LFPR

Half of Monterey County’s population is either under the prime working age or over it. As of April 2022, about half (50.1%) of Monterey County’s population is comprised of residents aged 25 to 64 years old. The next largest group in the county is residents under 18, making up 26.1 percent of the population. The two smallest groups are residents aged 65 and older (14%) and residents aged 18 to 24 (9.9%). The cohort of residents aged 65 and older has seen an uptick in its numbers between 2012 and 2019, increasing from 11.2 percent of the population to 14.0 percent. Between 2010 and 2019, the proportion of all other age groups in Monterey County decreased slightly (around 1%) but otherwise remained stable.

FIGURE 6. MONTEREY COUNTY POPULATION BY AGE GROUP, 2010-2019<sup>9</sup>

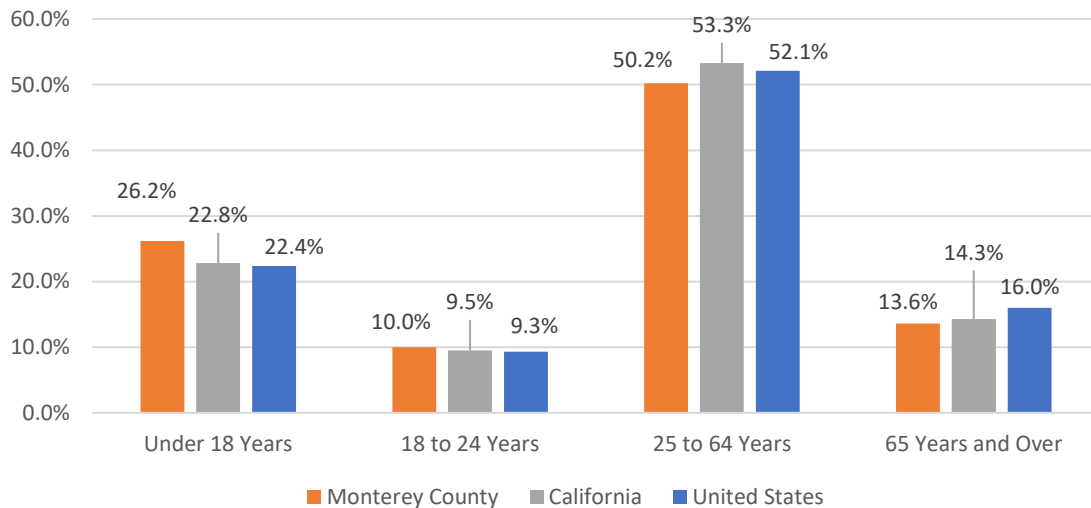


<sup>9</sup> Bureau of Labor Statistics: ACS 1-Year Estimates, 2010-2020.

**Though Monterey County’s population has gotten older over the last decade, its population is still younger than that of California or the United States.** In 2020, the median age was 38.2 years in the United States, 36.7 in California, and 34.7 in Monterey County. This trend continues as the data is broken down into individual age groups. Over 26 percent of Monterey County’s population is under 18 years old—about 4 points higher than California and the United States. The 18- to 24-year-old cohort makes up between 9 and 10 percent of the population in Monterey County, California, and the United States. Monterey County trails behind California and the U.S. in the percent of its population that falls into the two oldest age cohorts. California has the highest percentage of its population between 25 and 64 years old (about 53%), followed by the United States (about 52%) and Monterey County (about 50%). While 16 percent of the population in the U.S. is age 65 or older, only 14.3 percent of California’s population and 13.6 percent of Monterey County’s population fall into this cohort.

**Though Monterey’s population is younger on average than the population of the United States, over a quarter of its population is under age 18. This means that a significant portion of its population may be too young to enter the workforce or still be in school.** Additionally, while Monterey County has a smaller percentage of residents at or around retirement age compared to the U.S., its population is getting older. These conflicting factors make it difficult to analyze the impact of age on Monterey County’s LFPR and suggest that age is not the largest contributor to the county’s decreasing LFPR.

FIGURE 7. POPULATION BY AGE GROUP, MONTEREY COUNTY, CALIFORNIA, UNITED STATES, 2020<sup>10</sup>

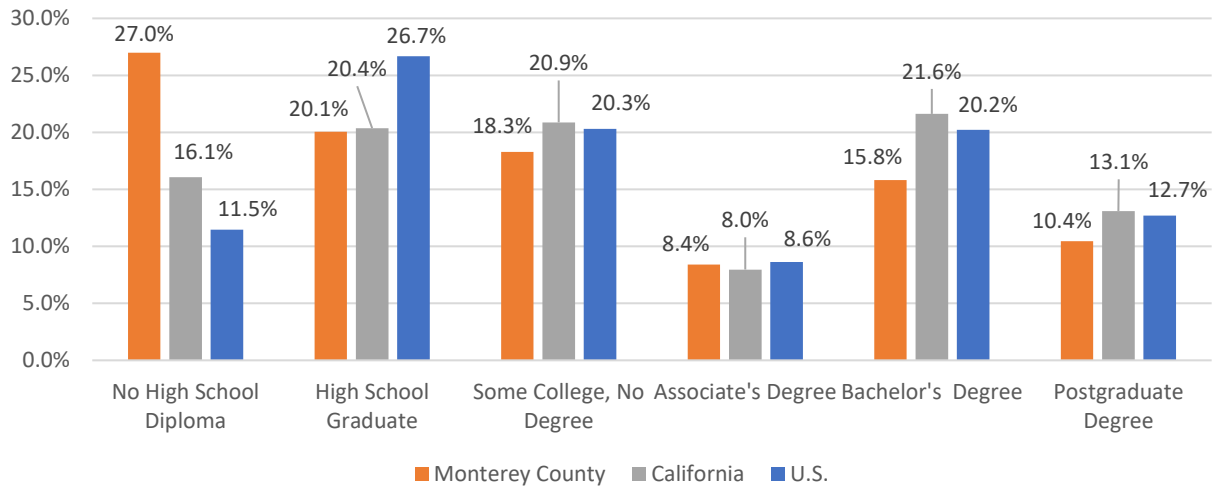


<sup>10</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

### IMPACTS OF EDUCATIONAL ATTAINMENT ON MONTEREY LFPR

**On average, Monterey County residents aged 25 and over exhibit lower rates of educational attainment than the rest of California and the United States.** One in four (27%) Monterey County residents do not have a high school diploma—well over double the percentage of individuals in the United States that do not have a high school diploma (11.5%). Monterey County (20.1%) and California (20.4%) have a similar percentage of residents who have a high school diploma as their highest level of educational attainment, however, both are lower than the U.S. as a whole (26.7%). Monterey County (18.3%) trails behind California (20.9%) and the U.S. (20.3%) when it comes to the number of residents who have completed some college but received no degree. Figures for people with an associate degree in Monterey County, the United States, and California are almost comparable; each has approximately 8 percent of residents who fit into this category. Just over one in four people in Monterey County have a bachelor’s degree or higher (26.2%) compared to around one in three in both California (34.7%) and the U.S. (32.9%).

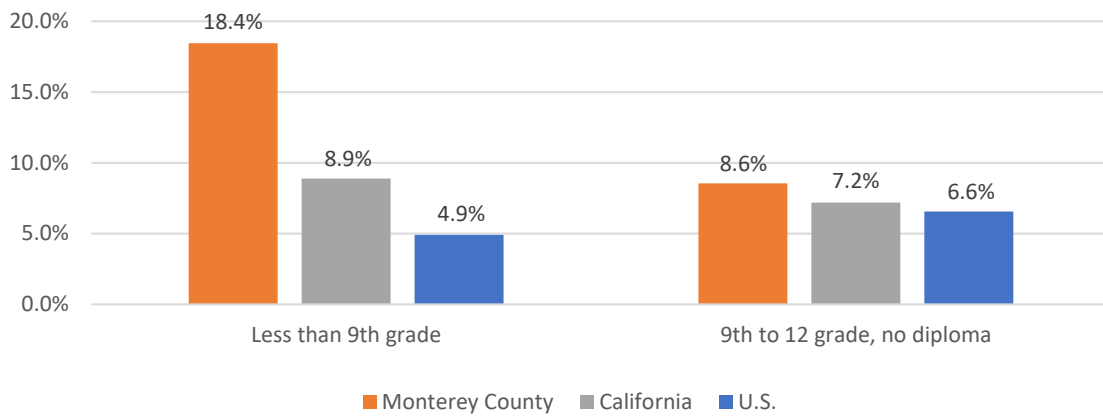
FIGURE 8. MONTEREY COUNTY EDUCATIONAL ATTAINMENT, 2020, 25 YEARS AND OVER<sup>11</sup>



<sup>11</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

**Over two thirds (68.3%) of those in Monterey County over age 25 who do not have a high school diploma received less than a 9<sup>th</sup> grade education.** This means that 18.4 percent of residents over age 25 in Monterey County did not make it to high school. This statistic is much lower for California and the U.S.—8.9 percent of residents over age 25 in California and 4.9 percent of residents over age 25 in the U.S. received less than a 9<sup>th</sup> grade education. The percentage of residents over age 25 who completed some high school but received no diploma is similar in all three regions, though Monterey County (8.6%) leads California (7.2%) and the U.S. (6.6%) in this group too. It is important to note that because the data is based on those age 25 and over, recent changes in middle and high school retention is not reflected in the data.

FIGURE 9. BREAKDOWN OF RESIDENTS WITHOUT HIGH SCHOOL DIPLOMA, 2020, 25 YEARS AND OVER<sup>12</sup>

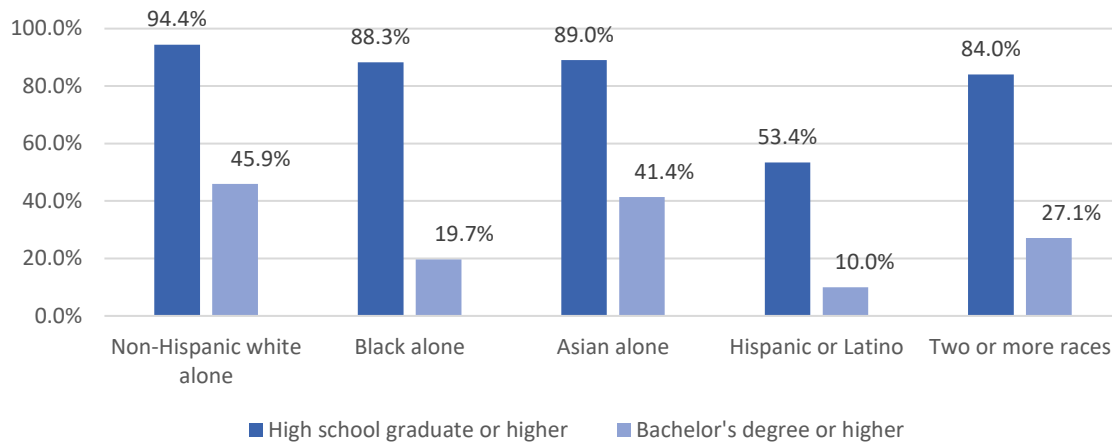


<sup>12</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

**Monterey County’s White residents have the highest overall educational attainment in the county.** They have the highest percentage of high school completion (94.4%), followed by Asian residents (89.0%) and Black residents (88.3%). Although Black residents trail behind white residents in their high school completion level about 6 percent, the gap between the two groups’ educational attainment widens at the collegiate level. About 46 percent of White residents in Monterey County have completed a bachelor’s degree or more, whereas only about 20 percent of Black residents have received the same level of education. Monterey County’s Asian residents have a similar level of educational achievement compared to the county’s White residents. Asian residents only trail about 5 percent behind White residents in their high school completion level and 4.5 percent behind in their completion of a bachelor’s degree or higher.

**Hispanic and Latino residents have the lowest educational attainment out of all racial and ethnic groups in Monterey County by far—only 53.4 percent of Hispanic or Latino residents have graduated from high school and only 10 percent have a bachelor’s degree or higher.** Hispanic and Latino residents are the largest racial or ethnic group in Monterey County, making up about 60 percent of the population. With a majority of the population falling behind academically, it is understandable that Monterey County’s educational attainment level is lower than that of California or the United States.

FIGURE 10. MONTEREY COUNTY EDUCATIONAL ATTAINMENT BY RACE, 2020<sup>13</sup>

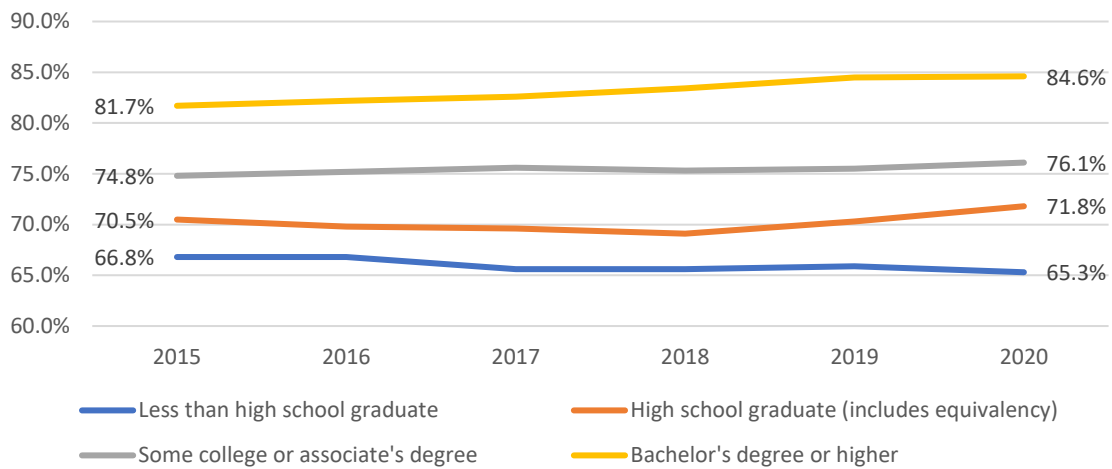


<sup>13</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

**Educational attainment is a key factor in a region’s labor force participation.** Between 2015 and 2020, there was a strong positive relationship between educational attainment level and labor force participation rate in Monterey County, meaning the higher the educational attainment level, the higher the LFPR. The gap in LFPR between those with less than a high school diploma and those with a high school diploma or higher widened between 2015 and 2020 as the LFPR for those with less than a high school diploma decreased while the LFPR for all other groups increased. With 27 percent of the population dropping out before receiving their high school diploma (

Figure 8), low educational attainment may play a key role in Monterey County’s decreasing LFPR.

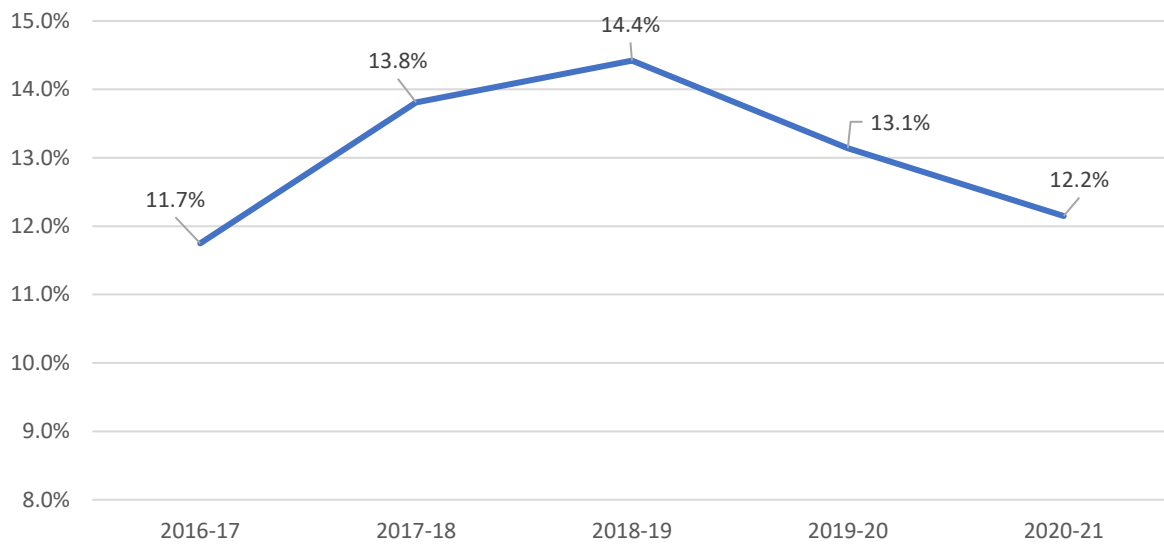
**FIGURE 11. MONTEREY COUNTY LABOR FORCE PARTICIPATION RATE BY EDUCATIONAL ATTAINMENT, 2015-2020, 25 YEARS AND OVER<sup>14</sup>**



<sup>14</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2015-2020.

Using four-year adjusted cohort data from the California Department of Education, the average dropout rate for high schools in Monterey County was 11.7 percent during the 2016 to 2017 school year. This statistic increased to 13.8 percent during the 2017 to 2018 school year and reached 14.4 percent during the 2018 to 2019 school year before falling to 13.1 percent during the 2019 to 2020 school year and 12.2 percent during the 2020 to 2021 school year. This data does not include the 18.4 percent of Monterey County residents who dropped out before entering high school. Additionally, without information about the 2021-2022 school year this data may not encompass the change in dropout rates caused by the COVID-19 pandemic. However, it does show a 2 percent decrease in dropout rates over the past two school years.

FIGURE 12. MONTEREY COUNTY AVERAGE ANNUAL DROPOUT RATE<sup>15</sup>



<sup>15</sup> California Department of Education: Four-Year Adjusted Cohort Graduation Rate and Outcome Data (2016-2021).



## Part 3: Monterey County's LFPR Cohorts

Below is a definition of how survey respondents were divided into cohorts to better understand the labor market in Monterey.

- **Job Changers:** respondents that changed employers during the pandemic
- **Potential Returners:** respondents that are not currently working, but anticipate rejoining the workforce
- **Consistent workers:** respondents that were working before the pandemic and are still working for the same employer
- **Non-workers:** respondents who were not working before the pandemic, did not work during the pandemic, and do not anticipate working in the future

### Key Characteristics of Cohorts

#### Job Changers

- Most job changers (58%) are between 18 to 34 years old, and more than half (54%) have some college but less than a four-year degree as their highest educational attainment.
- Among the job changers that are now working in a different industry than the one they were in before the pandemic started, retail or wholesale trade (22%), restaurants and food services (15%), and the public sector or education (10%) are the top three industries that job changers left. Conversely, public sector or education (15%), professional or business services (15%) and retail or wholesale trade (14%) were the top three industries that job changers moved into.
- Better pay or benefits was the most cited reason (46%) for job changers who changed employers.
- Three-quarters (76%) of job changers generally agreed that they are no longer willing to work in a job that they do not see a good future in, the largest proportion among all cohorts.

#### Potential Returners

- A third (31%) of the Returner respondents are unemployed and actively looking for work.
- The largest proportion (34%) of Potential Returners were between 18 and 24 years old.
- Two in five (38%) Potential Returners expect to go back to work in the next two months.
- A quarter (26%) of Potential Returners reported an inability to find work that fits their skills or within their location as their primary reason for unemployment.

#### Consistent workers

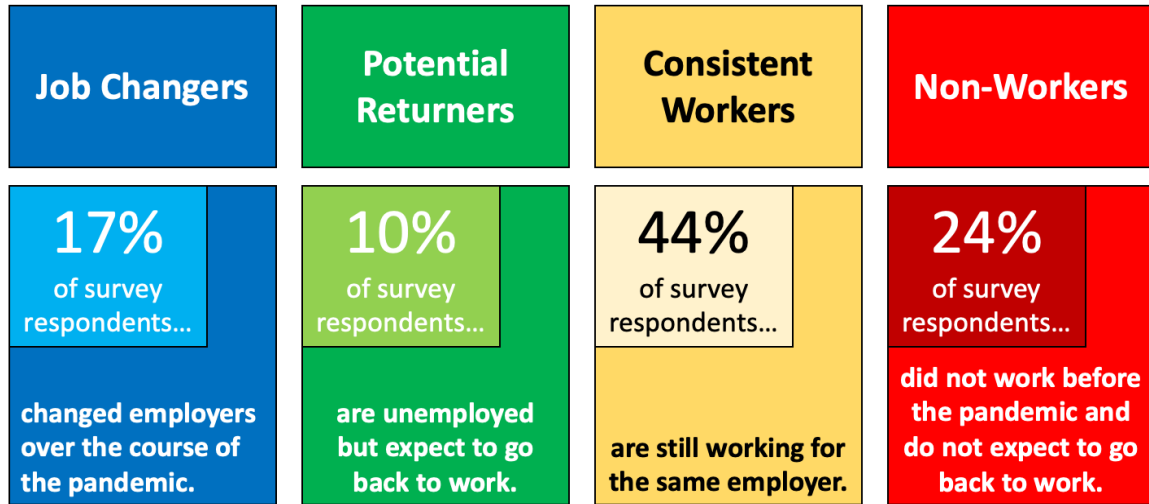
- Most consistent workers are between 25 to 54 years old (71%), also known as the “prime working age” group. Just over four-in-five (82%) consistent-workers are employed full time.
- Consistent workers have high levels of educational attainment with half (51%) having a bachelor's degree or higher. Consistent workers also have a relatively high household income, with nearly half (49%) earning a household income of \$100,00 or higher.
- Consistent workers are mostly concentrated in the public sector or education (24%) or healthcare (20%) industries.
- One quarter (26%) of consistent workers reported that finding or paying for day care as very challenging when trying to advance their career, the highest proportion of all cohorts.

### Non-Workers

- Most non-workers are 65 years or older (79%), the age group with the lowest LFPR. About nine in ten (88%) of these non-workers are retired or no longer looking for paid employment, and another 6% are homemakers or other responsibilities and not looking for paid employment.
- Over a third (35%) of non-workers have a graduate school degree—the largest proportion among all cohorts. Close to two-thirds (64%) had at least a four-year bachelor's degree.
- About one-third (32%) of non-workers have a household income of \$100,000 or more.
- Four in ten (39%) non-workers reported high medical costs as their biggest concern regarding their household's current financial situation.

## Cohort-Level Analysis

FIGURE 13. DISTRIBUTION OF FOUR RESIDENT GROUPS



\*5% of respondents did not fall in one of the four resident groups

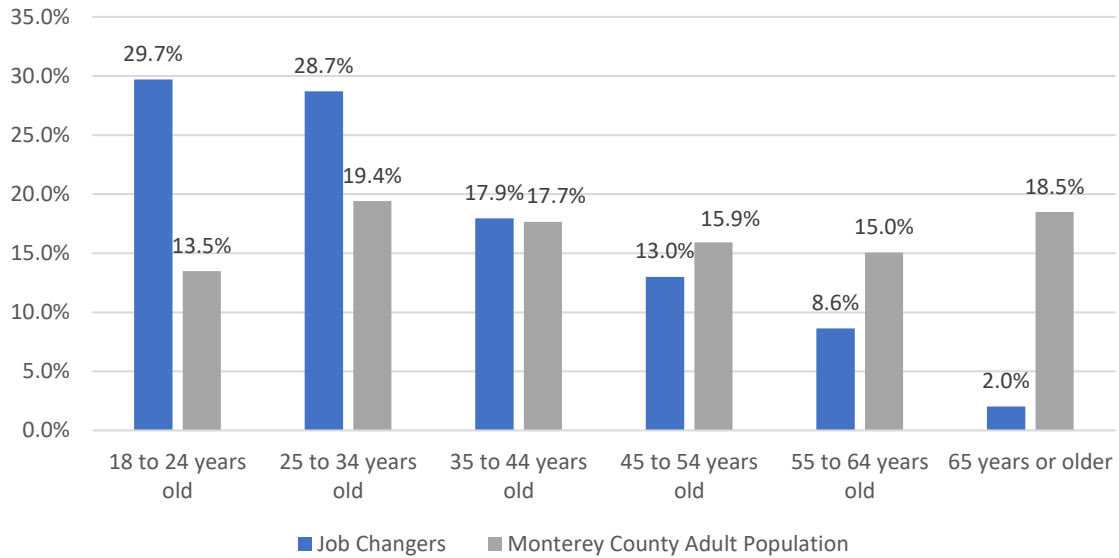
## JOB CHANGERS

### Key Takeaways

- Job changers are relatively young with three-in-five (58%) between 18 to 34 years old.
- Among the job changers that changed industries during the pandemic, retail or wholesale trade, restaurants and food services, and public sector or education were the top three industries that job changers exited from.
- Better pay or benefits and a more fulfilling career or a career more related to respondent’s long-term goals were the top two reasons for changing employers.
- More than three-quarters (76%) of job changers either strongly agreed or somewhat agreed that they are no longer willing to work in a job that they do not see a good future in, the largest proportion among all cohorts

Job Changers are individuals who changed employers throughout the pandemic but did not stop working. These respondents accounted for 17 percent of all survey respondents. Just under three-in-five (58%) of job changers were between 18 to 34 years old. Three-in-ten (31%) job changers were between 35 and 54 years old, and only 11% were in or near retirement age (55 or older). (Figure 14)

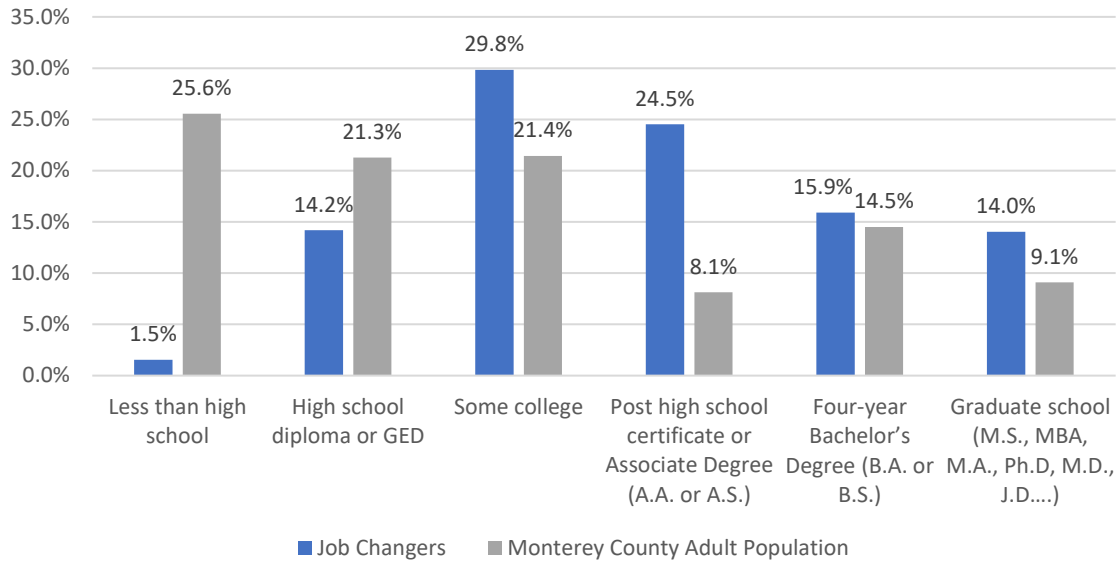
FIGURE 14. AGE COHORTS FOR JOB CHANGERS AND MONTEREY COUNTY<sup>16</sup>



One-in-three (30%) job changers had some college but no degree as their highest level of educational attainment. Another quarter (25%) of job changer respondents had a post high school certificate or an associate degree as their highest level of educational attainment. Close to one in six (16%) job changers had a less than a high school diploma or had a high school diploma or GED as their highest level of educational attainment. (Figure 15)

<sup>16</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020. “Don’t know/ Refused” was excluded for job changers and accounted for the missing 10%.

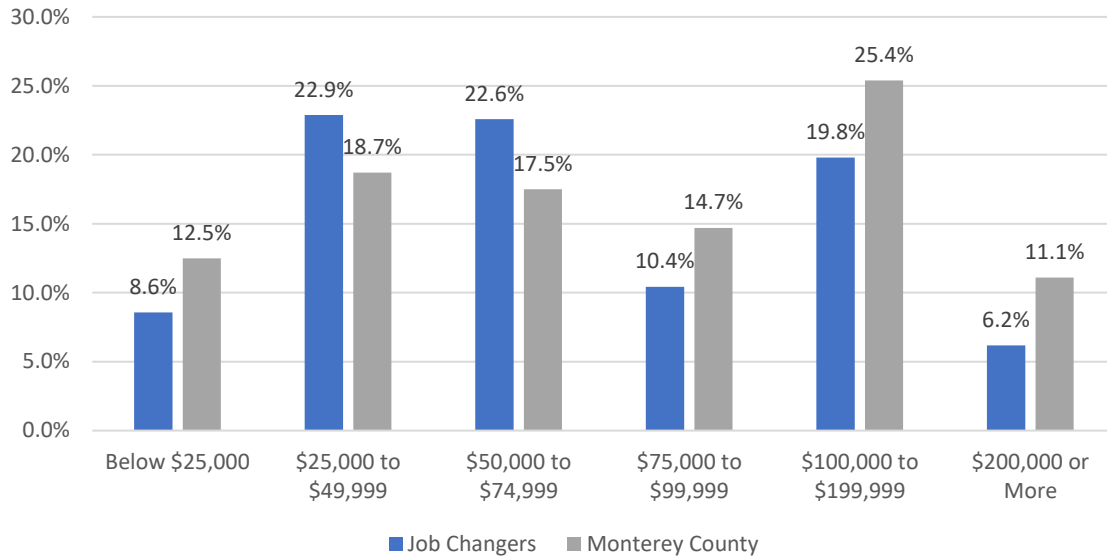
FIGURE 15. EDUCATIONAL ATTAINMENT FOR JOB CHANGERS AND MONTEREY COUNTY<sup>17</sup>



One-in-three (36%) job changers had a household income of \$75,000 or higher, compared to Monterey County where half (51%) of all residents have a household income of \$75,000 or higher. Nearly half (46%) of job changer respondents had a household income between \$25,000 and \$75,000. Just under one-in-ten (9%) of job changers had a household income below \$25,000. (Figure 16)

<sup>17</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

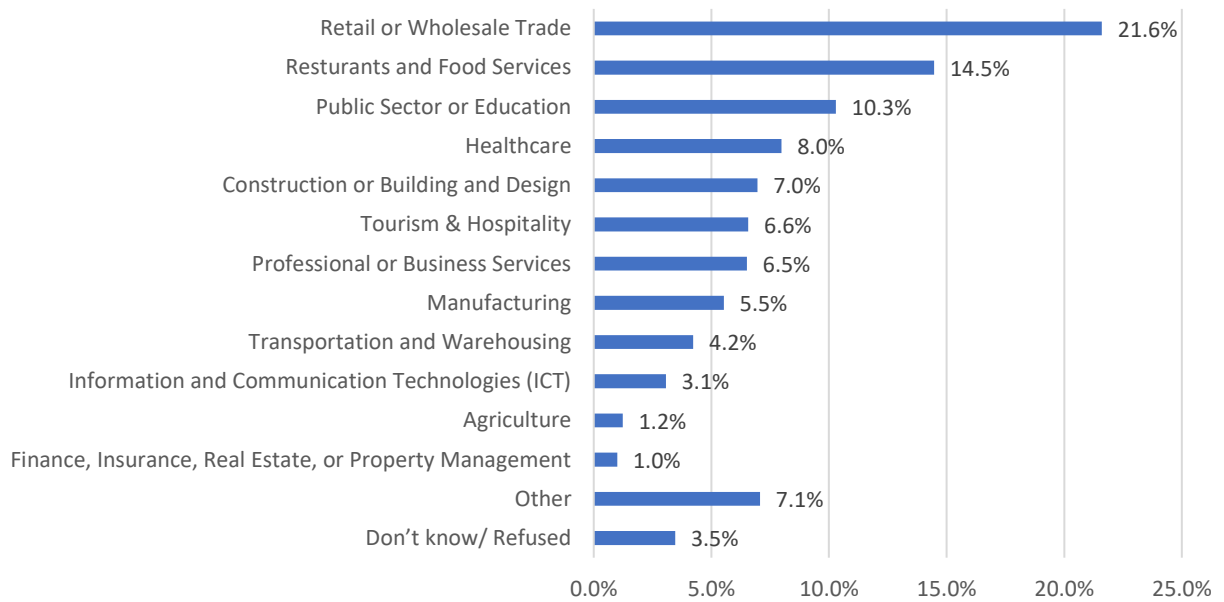
FIGURE 16. HOUSEHOLD INCOME FOR JOB CHANGERS AND MONTEREY COUNTY<sup>18</sup>



**Nearly half (48%) of job changers are currently working in a different industry from the one they worked before the pandemic.** Close to two-in-ten (22%) job changers who are working in a different industry from their pre-pandemic industry were in retail or wholesale trade. That is the industry that saw most job changer respondents leave. The restaurants and food services industry is the second most abandoned industry—about 15% of job changers left. (Figure 17)

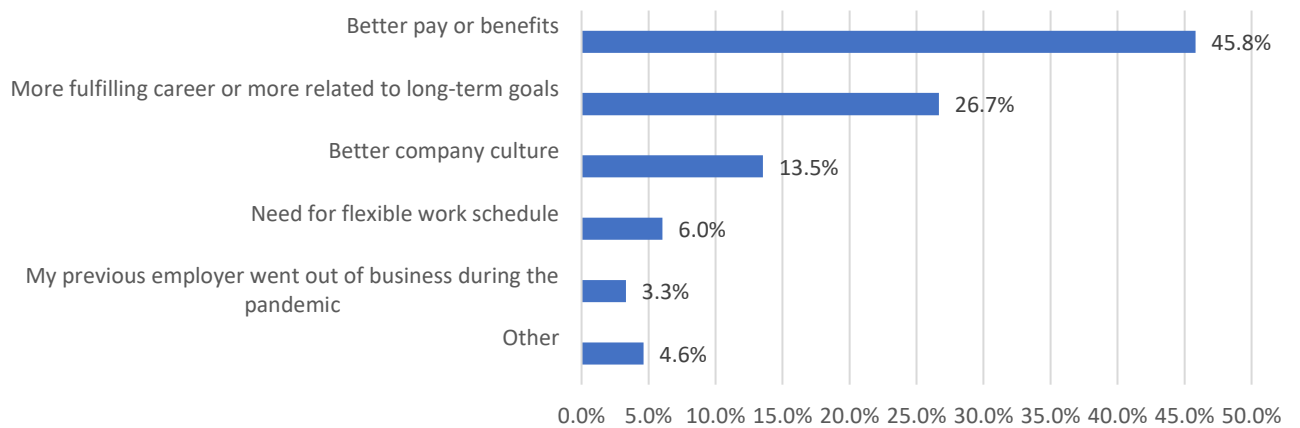
<sup>18</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

FIGURE 17. INDUSTRIES JOB CHANGERS LEFT



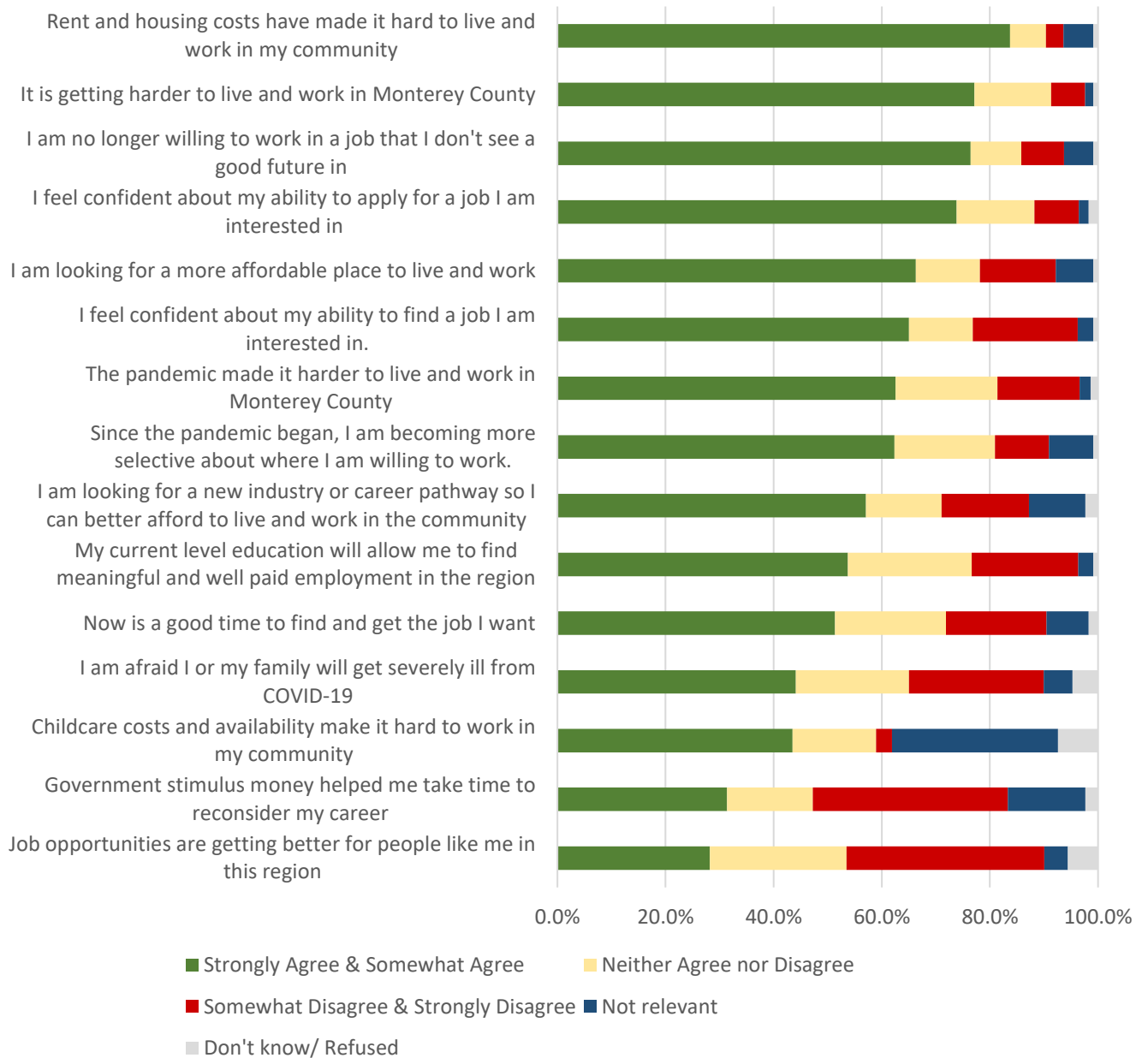
Just under half (46%) of job changers cited better pay or benefits as the primary reason for changing employers. One in four (27%) job changer respondents cited looking for a more fulfilling career or a career more related to their long-term goals as their primary reason for changing employers. Less than one in ten (6%) job changers cited the need for a flexible work schedule as their primary reason for changing employers (Figure 18).

FIGURE 18. PRIMARY REASON FOR CHANGING EMPLOYERS



**More than four-in-five (83%) job changers generally agree that rent and housing costs have made it hard to live and work in Monterey County.** More than three-quarters (76%) of job changers either strongly agreed or somewhat agreed that they are no longer willing to work in a job that they do not see a good future in, the largest proportion among all cohorts. Over one-in-three (37%) job changers generally disagree (either strongly disagree or somewhat disagree) that job opportunities are getting better for people like themselves in the region. (Figure 19)

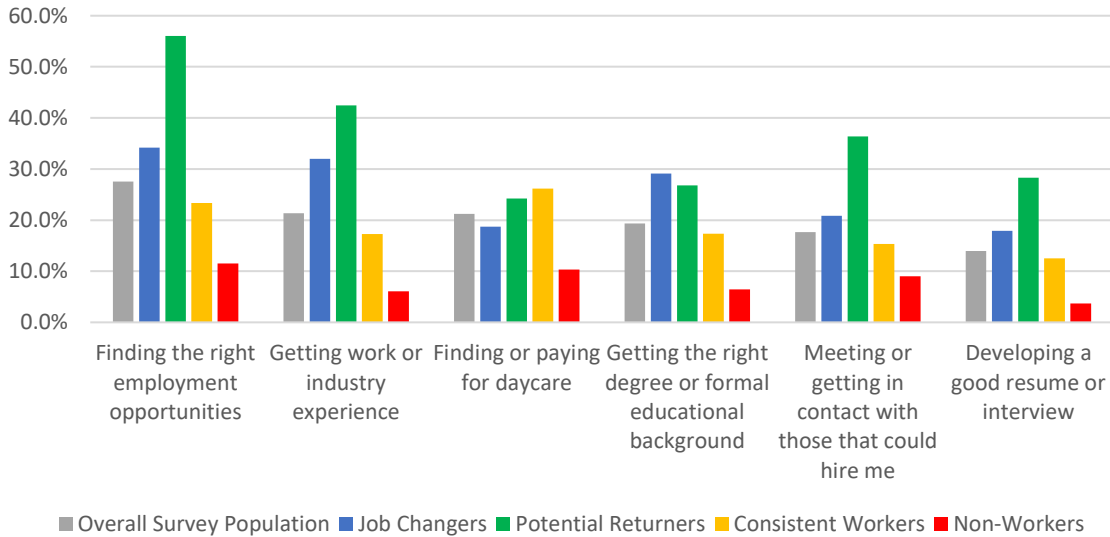
FIGURE 19. AGREEMENT WITH STATEMENTS ABOUT WORK IN THE REGION – JOB CHANGERS





**Finding the right employment opportunities was most cited as very challenging among job changers when trying to advance their career at 34 percent.** Getting work or industry experience followed with 32% of job changers citing this as very challenging. Job changers had the highest proportion of respondents citing getting the right degree or formal educational background (29%) as very challenging. Job changers had the highest proportion of respondents citing getting the right degree or formal educational background (29%) as very challenging. (Figure 20)

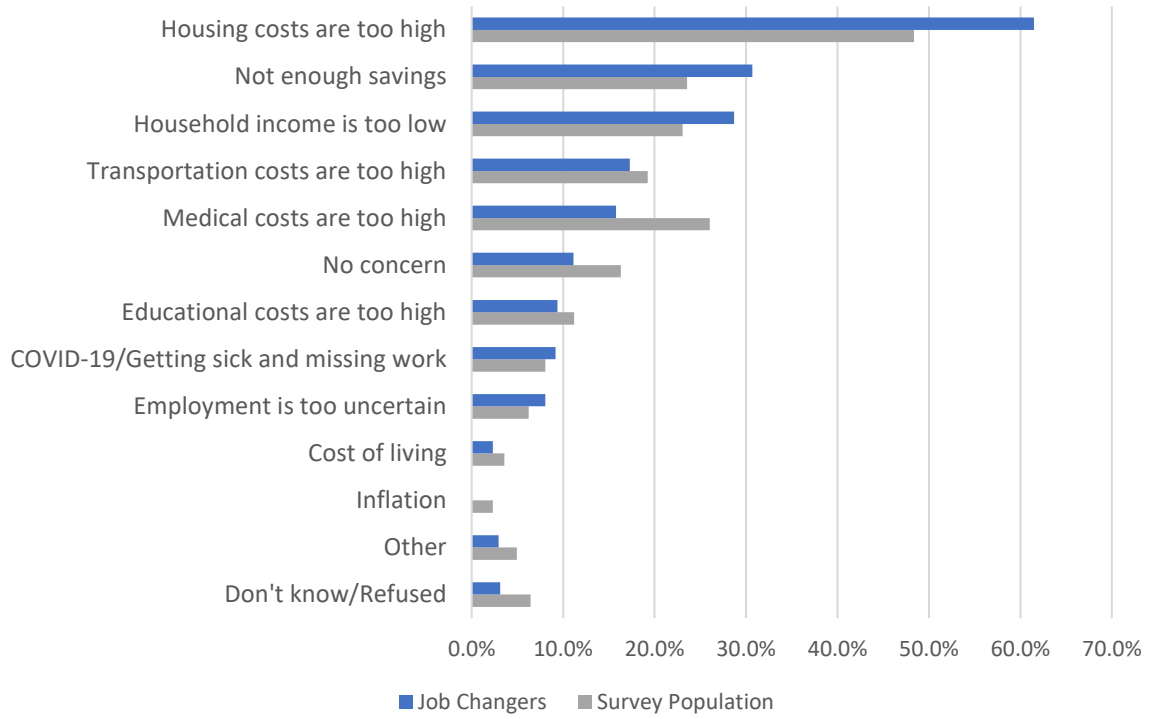
FIGURE 20. PROPORTION OF “VERY CHALLENGING” OBSTACLES WHEN TRYING TO ADVANCE CAREER



**Just over three-in-five (62%) job changers cited housing costs are too high as their biggest concern about their household’s financial situation.** Not enough savings (31%) and household income is too low

(29%) followed as the biggest concern among job changers household's financial situation. Only 11% of job changers reported having no concern with their household's current financial situation. (Figure 21)

FIGURE 21. JOB CHANGERS BIGGEST CONCERN ABOUT HOUSEHOLD'S FINANCIAL SITUATION



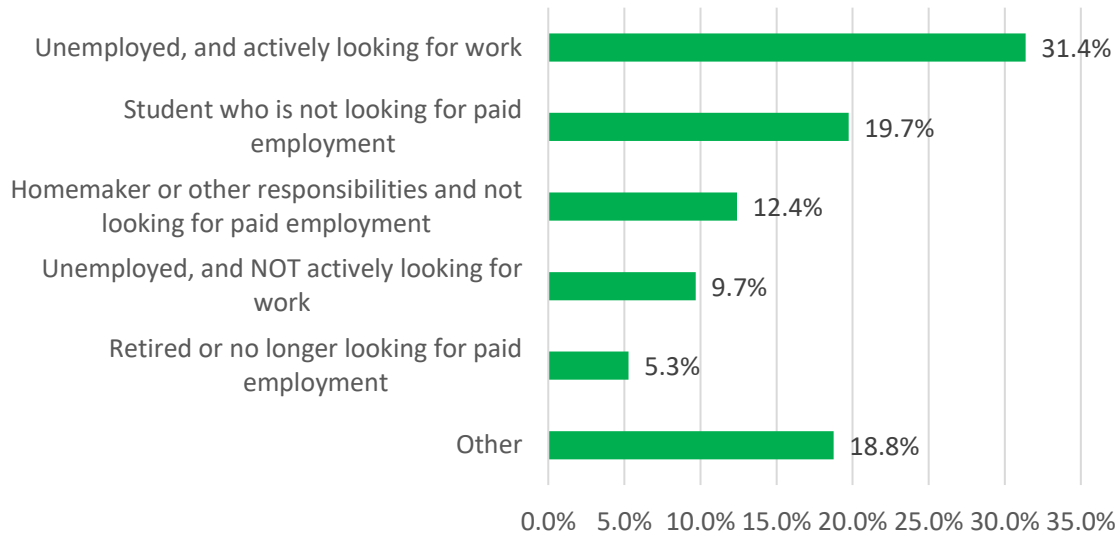
## POTENTIAL RETURNERS

### Key Takeaways

- A third (31%) of the Returner respondents are unemployed and actively looking for work.
- The largest proportion (34%) of Potential Returners were between 18 and 24 years old.
- Two in five (38%) of Potential Returners expect to go back to work in the next two months.
- About three-quarters (73%) of Potential Returners have less than a four-year bachelor’s degree.
- A quarter (26%) of Potential Returners reported an inability to find work that fits their skills or within their location as their primary reason for unemployment.

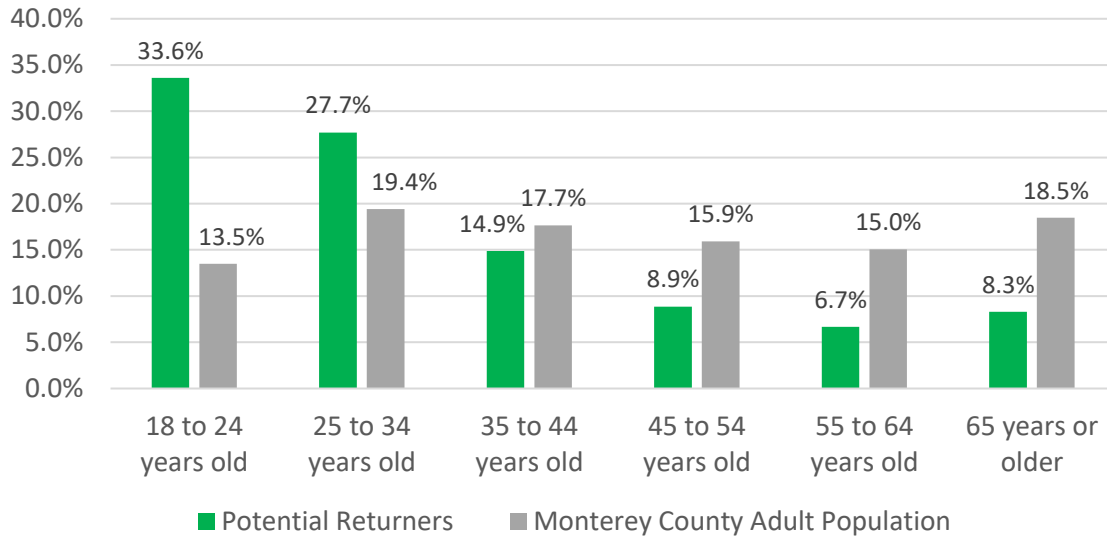
Potential Returners consisted of respondents that were unemployed but expect to go back to work or look for paid employment in the future. Potential Returners accounted for 10% of all respondents. Close to one-third (31%) of Potential Returners are unemployed and actively looking for work. Of the unemployed Potential Returners, more than half (55%) were working full-time when the pandemic started in February or March of 2020, and about 18% were not working or looking for work at the start of the pandemic. (Figure 22)

FIGURE 22. POTENTIAL RETURNERS’ CURRENT EMPLOYMENT SITUATION



The majority of Returner respondents were in the 18 to 34 age range. One-third (34%) of Potential Returners were between 18 to 24 years old, and more than a quarter (28%) were 25 to 34 years old. Potential Returners between 35 and 44 years old were the third largest group (15%), and the near-retirement age cohort of 56 to 64 years old was the smallest with less than one in ten (7%) of Returner respondents. (Figure 23)

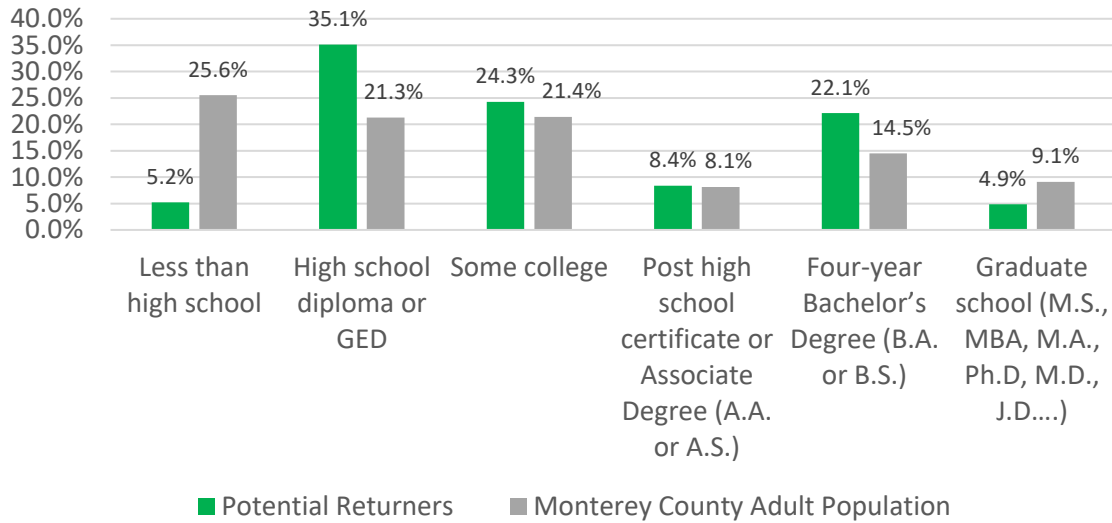
FIGURE 23. AGE COHORTS FOR POTENTIAL RETURNERS AND MONTEREY COUNTY<sup>19</sup>



Close to three in five (59%) Returner respondents have between a high school diploma or GED and some college but no degree as their highest level of educational attainment. About one in every twenty (5%) Returner respondents has a graduate school degree, below the Monterey County average of 9%. (Figure 24)

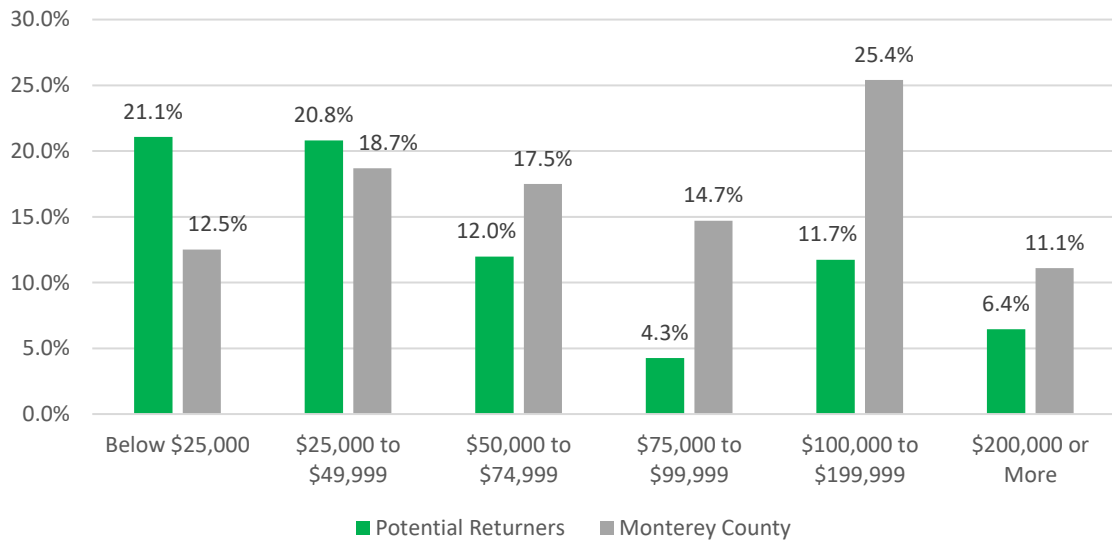
<sup>19</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

FIGURE 24. EDUCATIONAL ATTAINMENT FOR POTENTIAL RETURNERS AND MONTEREY COUNTY<sup>20</sup>



Over four in ten (42%) Returner respondents have a household income below \$50,000. One-fifth (21%) of Potential Returners had a household income below \$25,000, the largest proportion of all household income levels. In contrast, one in every eight (13%) Monterey County households have an income below \$25,000. Slightly less than a quarter (22%) of Potential Returners have a household income of \$75,000 or more. (Figure 25)

FIGURE 25. RETURNER AND MONTEREY COUNTY HOUSEHOLD INCOME<sup>21</sup>

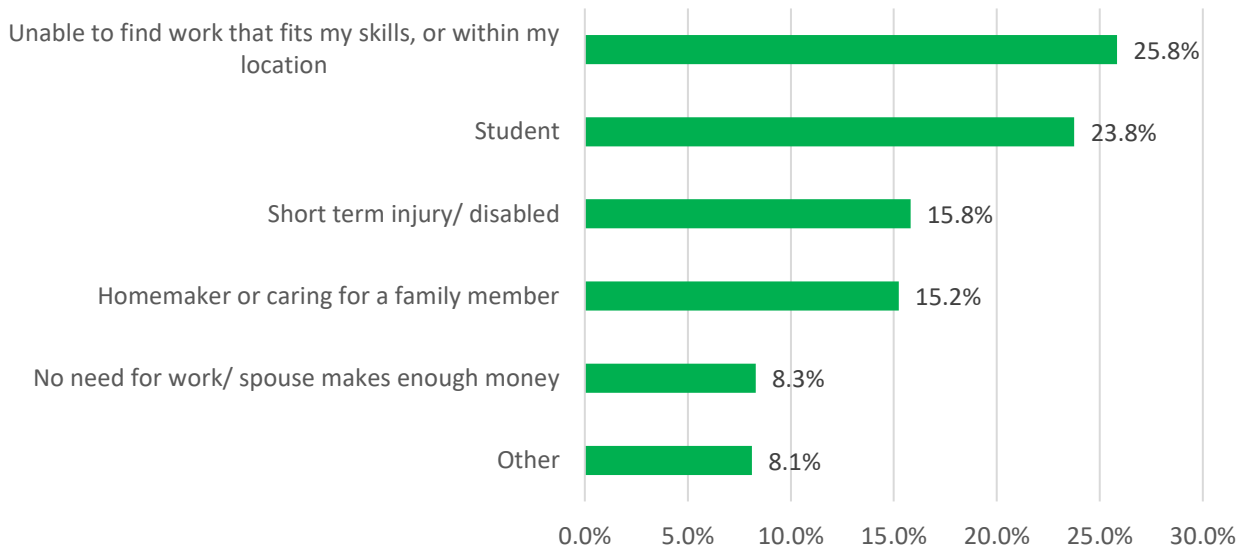


<sup>20</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

<sup>21</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

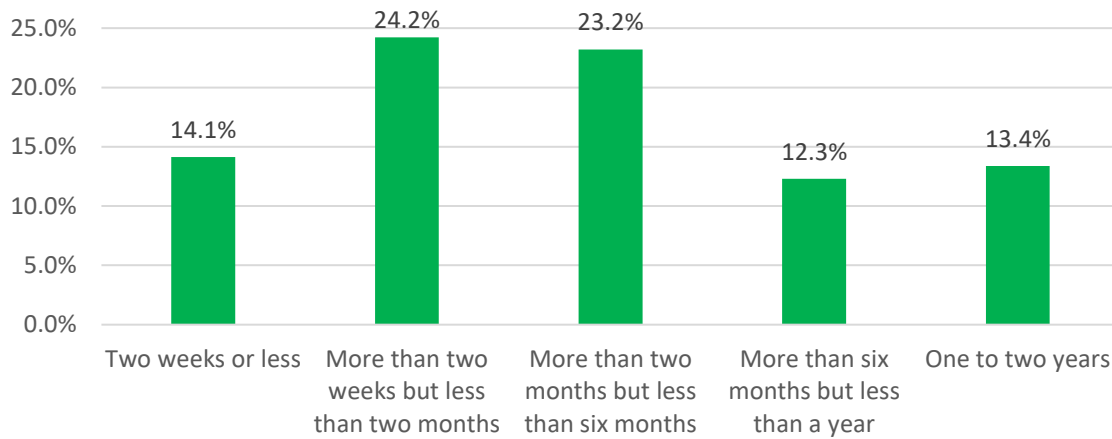
Respondents were asked about the primary reason for their unemployment, and over a quarter (26%) of Returner respondents cited that they are unable to find work that fits their skills or that is within their location. The second most cited reason for unemployment came from Potential Returners that were students, about a quarter (24%) cited their studies as the primary reason for unemployment. Close to one in six (16%) Potential Returners cited short term injury or disability as their primary reason for unemployment. Another 15% of Potential Returners cited being homemakers or caring for family members as their reason for unemployment. (Figure 26)

FIGURE 26. PRIMARY REASON FOR UNEMPLOYMENT



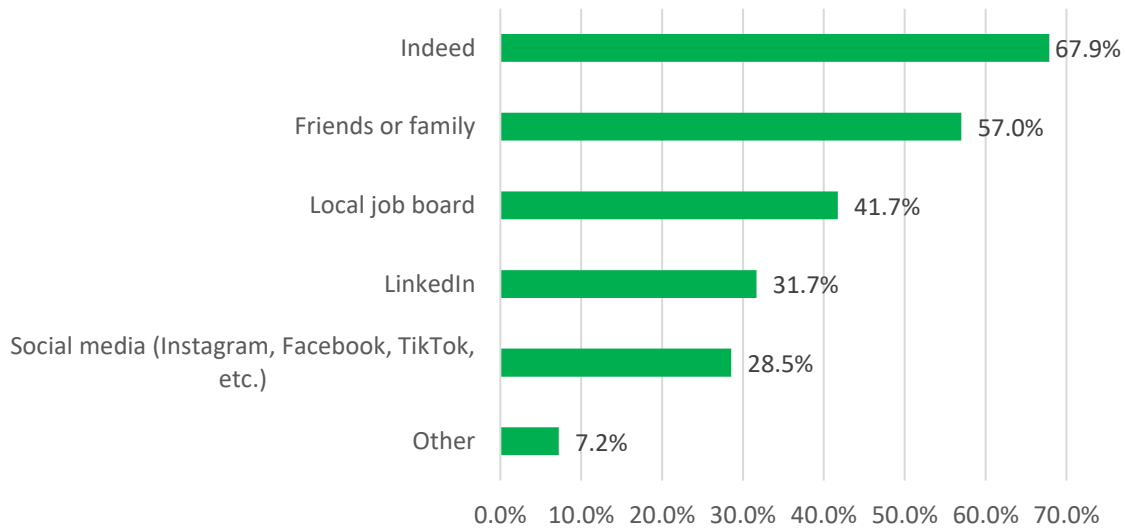
About six in ten (62%) Returner respondents expect to get back to work within six months. Almost one quarter (24%) of Potential Returners expect to go back to work in more than two weeks, but within the next two months. Another quarter (23%) of Potential Returners expect to go back to work in more than two months, but within the next six months. About 14% of Potential Returners expect to return to work in two weeks or less (Figure 27). Of all Returner respondents, more than four in five (83%) expect to go back to work in Monterey County.

FIGURE 27. EXPECTED TIMEFRAME TO RETURN TO WORK



Over two in three (68%) Returner respondents reported Indeed as a resource to look for a new job, and more than half (57%) have friends or family as a resource to look for a new job. Local job boards are used by two-fifths (42%) and LinkedIn is used by almost a third (32%) of Returner respondents. (Figure 28)

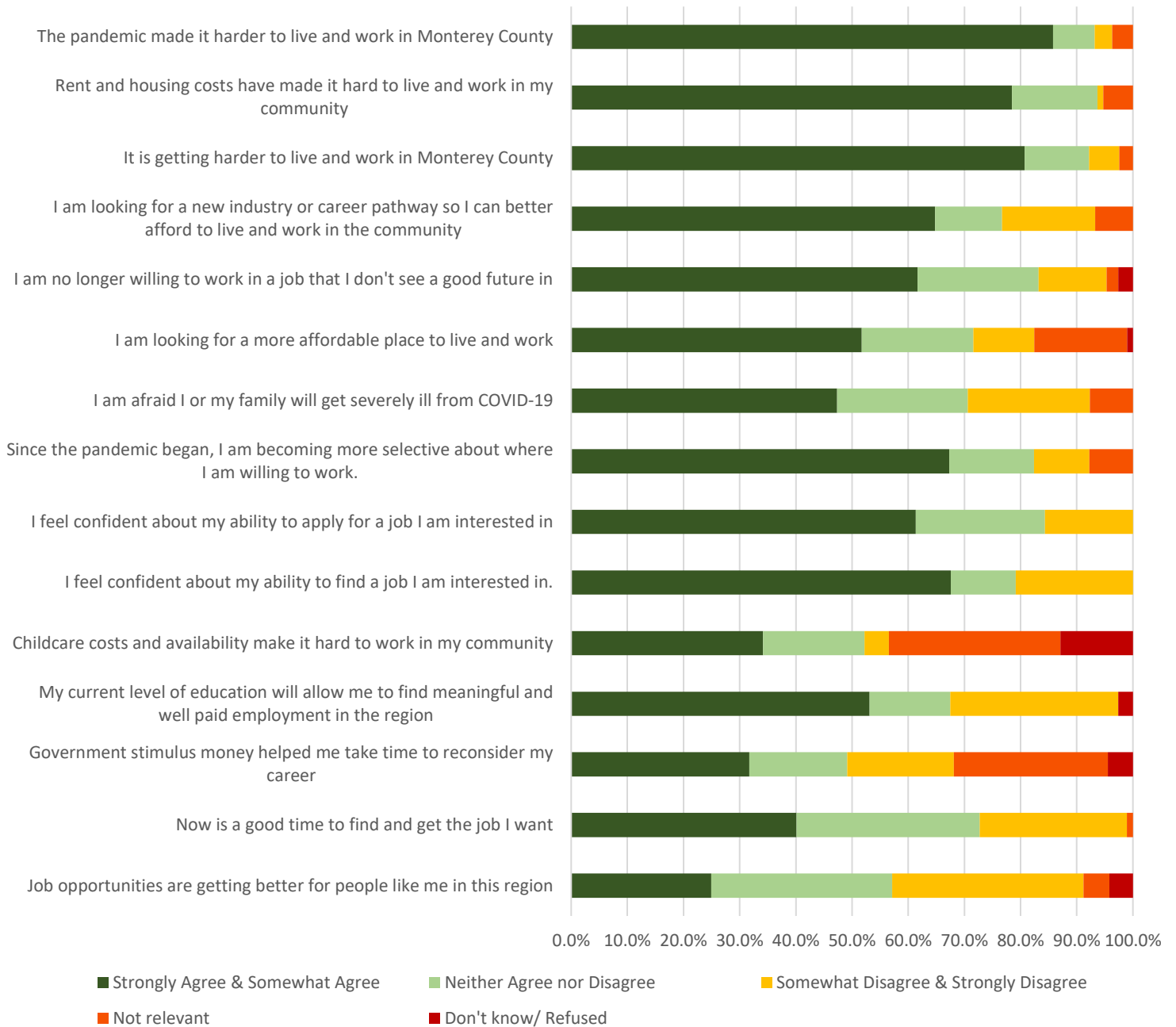
FIGURE 28. RESOURCES USED TO LOOK FOR A NEW JOB



**When prompted to state their level of agreement with a series of statements, Potential Returner respondents strongly agreed that the pandemic and housing costs were considerable challenges.** Close to nine in ten (86%) Potential Returners agreed that the pandemic made it harder to live and work in Monterey County. More than a third (34%) of Returner respondents disagreed that job opportunities are getting better in the region, almost 14% strongly disagreed. Three in ten (30%) Potential Returners

disagree that their current education level will allow them to find meaningful and well-paid employment in the future. (Figure 29)

FIGURE 29. AGREEMENT WITH STATEMENTS ABOUT WORK IN THE REGION





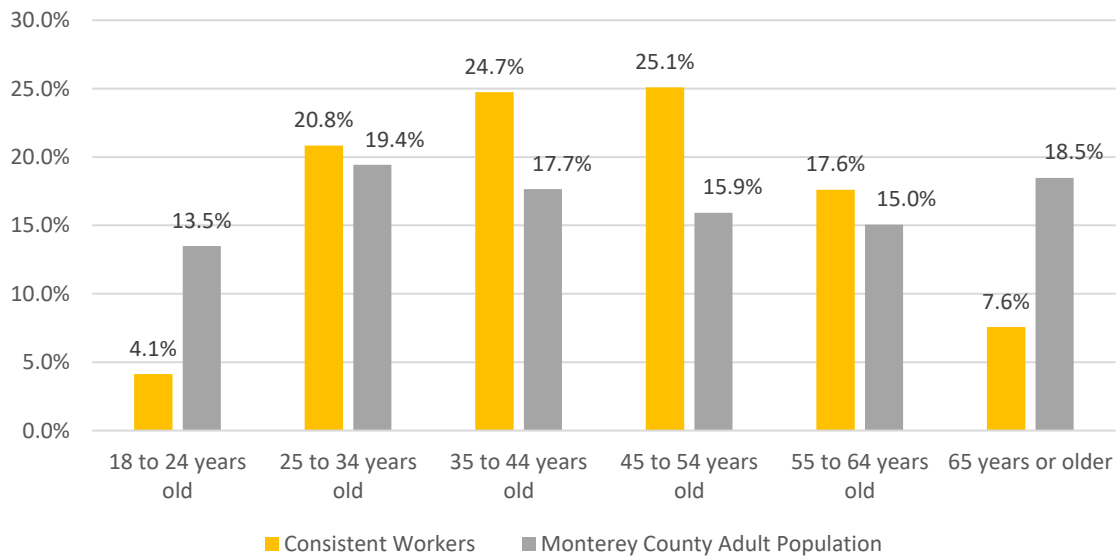
## CONSISTENT WORKERS

### Key Takeaways

- Most consistent workers are between 25 to 54 years old (71%). This age range is also known as the “prime working age” group. Just over four-in-five (82%) consistent-workers are employed full time.
- Consistent workers had high levels of educational attainment with half (51%) having a bachelor's degree or higher. Consistent workers also had a relatively high household income, with nearly half (49%) earning a household income of \$100,00 or higher.
- Consistent workers were mostly concentrated in the public sector or education (24%) or healthcare (20%) industries.
- One quarter (26%) of consistent workers reported that finding or paying for day care as very challenging when trying to advance their career, the highest proportion of all cohorts.

Consistent workers are individuals who did not stop working throughout the pandemic and are working for the same organization from when the pandemic started. Consistent workers accounted for just under half (44%) of the survey population. Seven-in-ten (71%) consistent workers are in their prime working age (between 25 to 54 years old) compared to half (53%) of the Monterey County adult population. One-quarter (25%) of consistent workers are in or near retirement age (55 years or older), and only 4% are between 18 to 24 years old. (Figure 30)

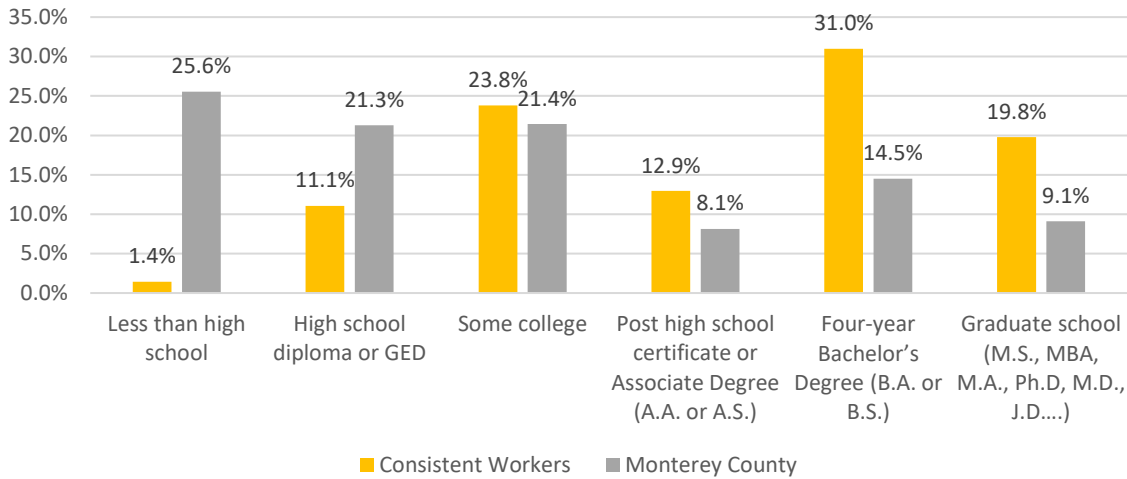
FIGURE 30. AGE COHORTS FOR CONSISTENT WORKERS AND MONTEREY COUNTY<sup>22</sup>



<sup>22</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

Consistent workers are largely educated with half (51%) having a four-year bachelor’s degree and above as their highest educational attainment compared to just under one-quarter (24%) in Monterey County. (Figure 31)

FIGURE 31. EDUCATIONAL ATTAINMENT FOR CONSISTENT WORKERS AND MONTEREY COUNTY<sup>23</sup>

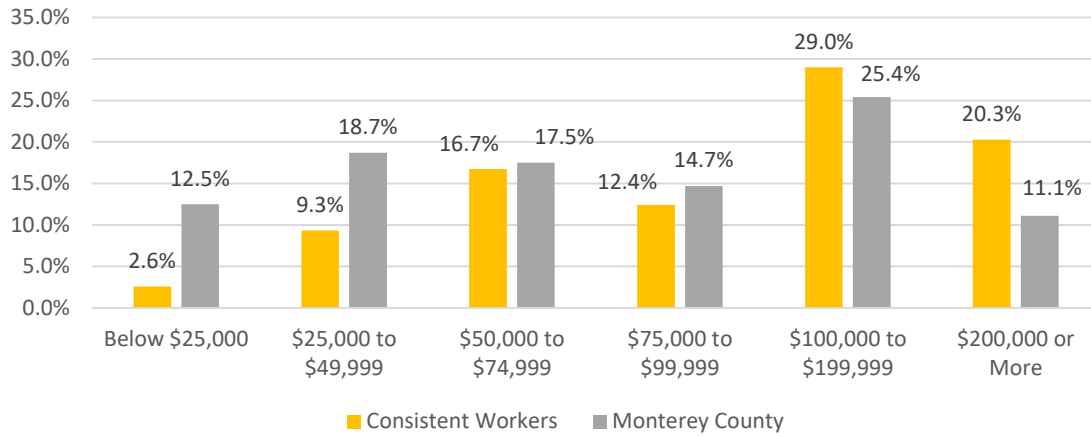


Just under half (49%) of consistent workers had a household income of \$100,000 or more. One-in-three consistent workers had a household income between \$50,000 to \$99,999, and only 12% had a household income below \$50,000. (

Figure 32)

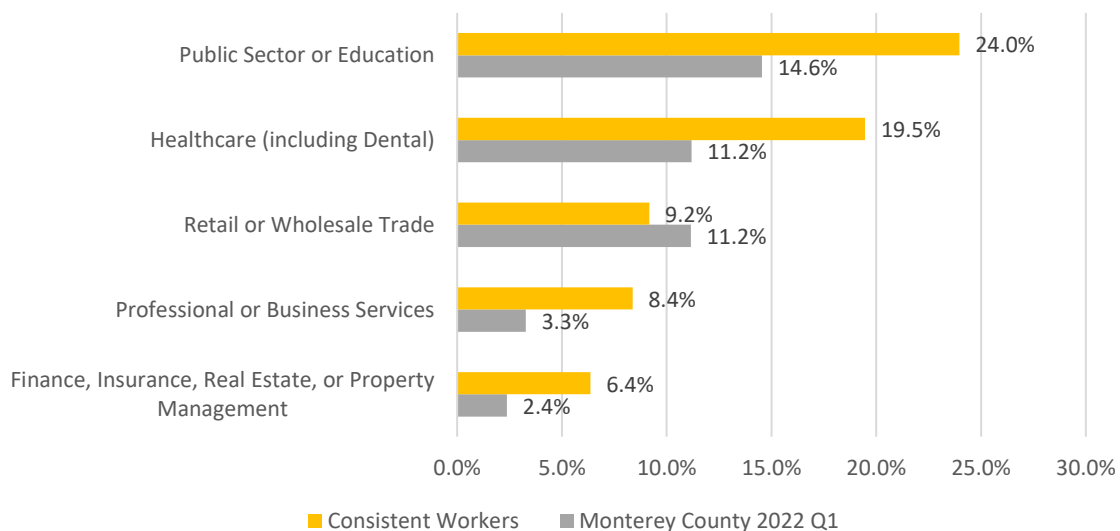
<sup>23</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

FIGURE 32. HOUSEHOLD INCOME FOR CONSISTENT WORKERS AND MONTEREY COUNTY (2020)<sup>24</sup>



Nearly one-quarter of consistent workers were in the public sector or education, the highest proportion of all industries for consistent workers. Healthcare followed with one in five (20%) consistent workers. Retail or wholesale trade (9%), professional or business services (8%), and finance, insurance, real estate, or property management (6%) were the next highest industries in employment for consistent workers. (Figure 33)

FIGURE 33. TOP FIVE INDUSTRIES FOR CONSISTENT WORKERS<sup>25</sup>

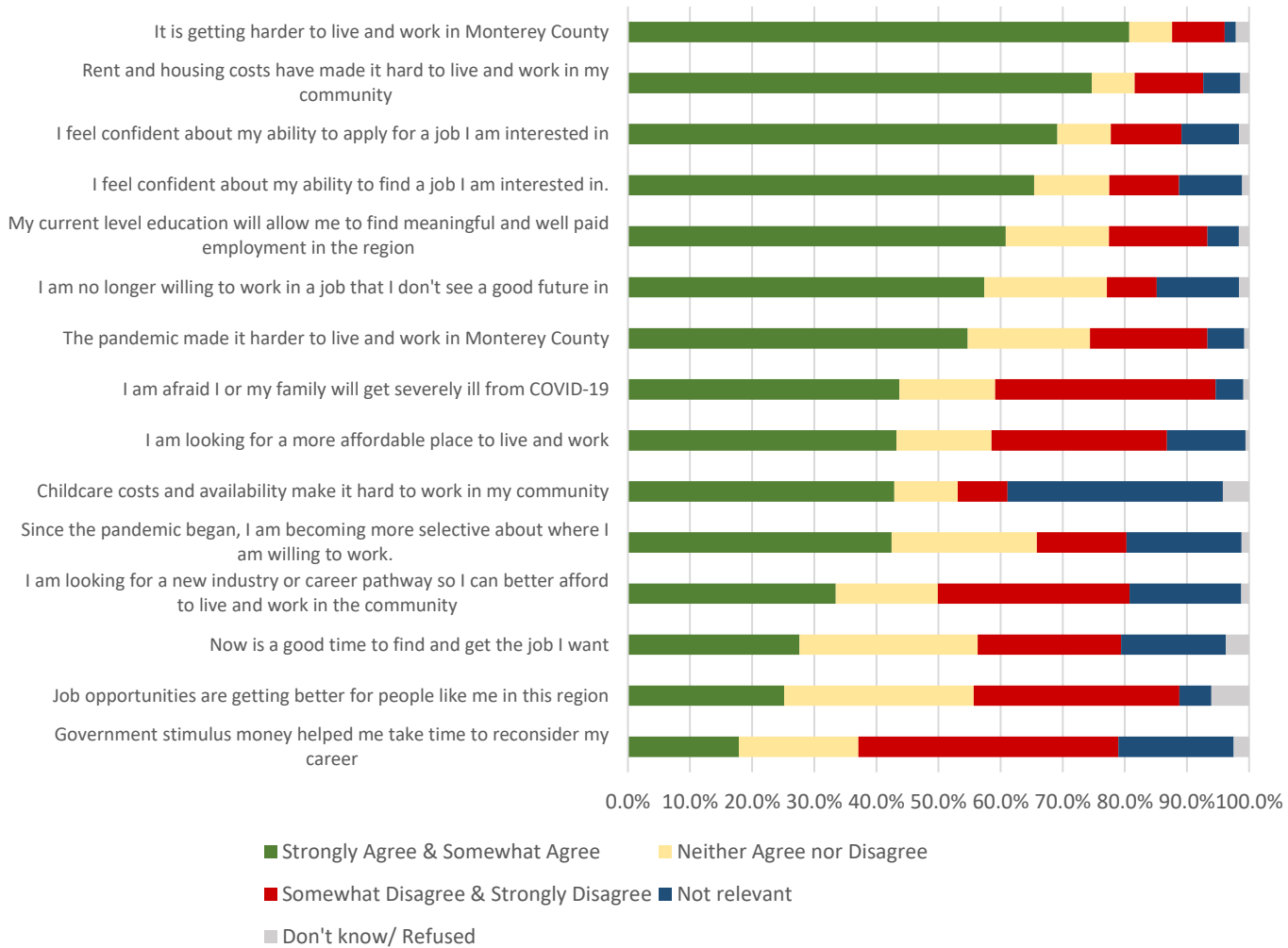


<sup>24</sup> “Don’t know/ Refused” was excluded for consistent workers and accounts for the missing 10%.

<sup>25</sup> Source: JobsEQ®

**Four-in-five consistent (81%) workers generally agree (strongly agree and somewhat agree) that it is getting harder to live and work in Monterey County.** Seven-in-ten (69%) consistent workers generally agree that they feel confident about their ability to apply for a job that they are interested in, the highest proportion among all cohorts. Two-in-five (42%) consistent workers generally disagree that the government stimulus money helped them take time to reconsider their career. One-in-three (34%) consistent workers generally agree that they are looking for a new industry or career pathway so they can better afford to live and work in Monterey County (Figure 34).

FIGURE 34. AGREEMENT WITH STATEMENT ABOUT WORK IN THE REGION – CONSISTENT WORKERS



## NON-WORKERS

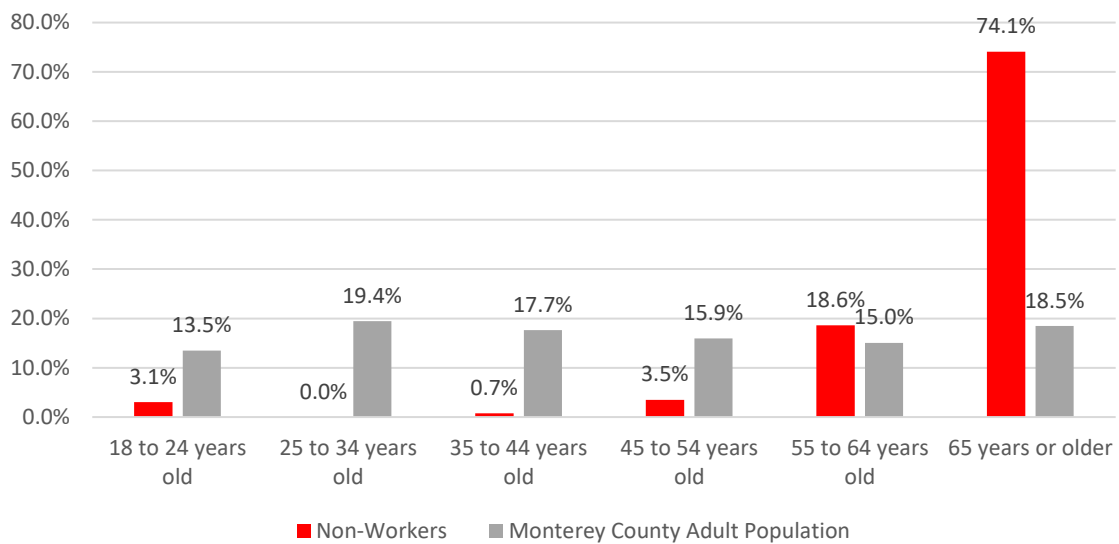
### Key Takeaways

- Most non-workers are 65 years or older (79%), the age group with the lowest LFPR. About nine in ten (88%) of these non-workers are retired or no longer looking for paid employment.
- The largest proportion of non-workers (35%) had a graduate school degree. Close to two-thirds (64%) had at least a four-year bachelor's degree.
- About one-third (32%) of non-workers have a household income of \$100,000 or more.

- Four in ten (39%) non-workers reported high medical costs as their biggest concern regarding their household’s current financial situation.

Non-Workers are individuals who are currently not working and do not expect to go back to work in the future. Non-workers accounted for one-quarter (24%) of survey respondents. Most (93%) of the non-worker respondents are not in their prime working age, 55 years or older. Three in four (74%) non-workers are 65 years or older. Less than 5% of non-workers were in their prime working age, and just under 3% were 18 to 25 years old. (Figure 35)

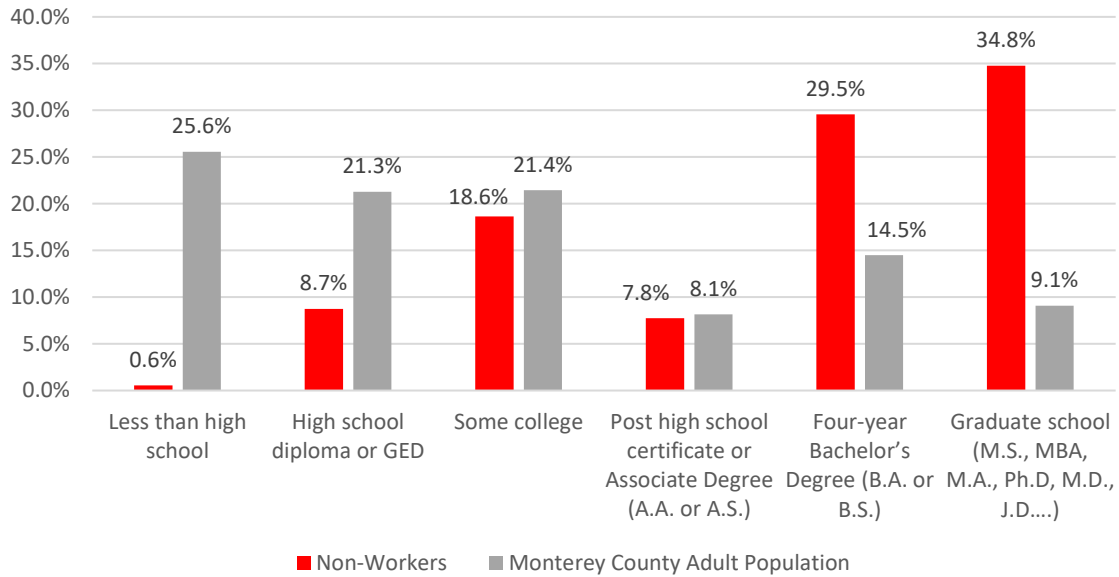
FIGURE 35. AGE COHORTS FOR NON-WORKERS MONTEREY COUNTY<sup>26</sup>



**Close to two-thirds (64%) of the non-workers respondents had at least a four-year bachelor’s degree.** Over one-quarter (26%) of non-workers had either some college, a post-high school certificate, or an associate degree. Almost all non-workers (99%) had at least a high school diploma or GED. (Figure 36)

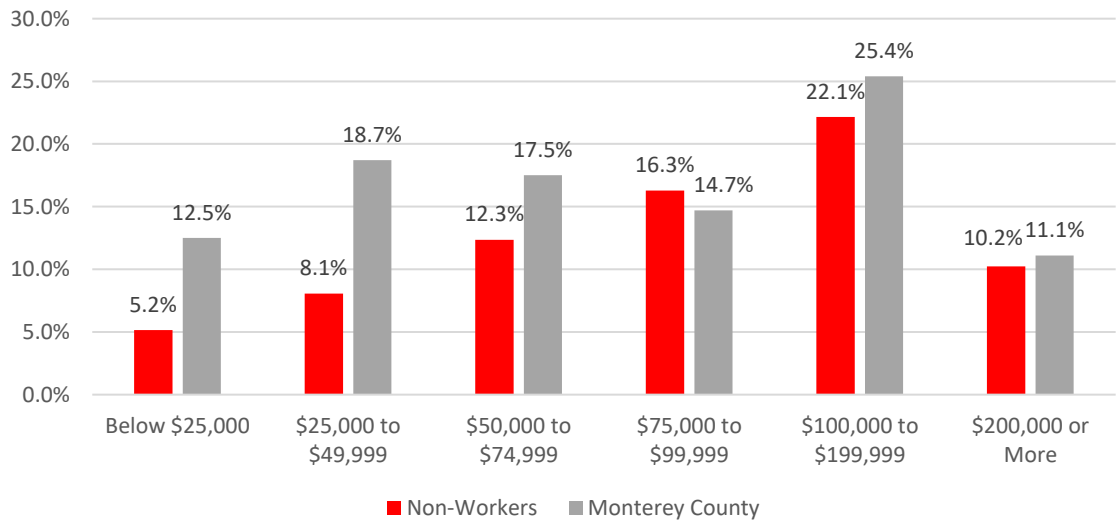
<sup>26</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

FIGURE 36. EDUCATIONAL ATTAINMENT FOR NON-WORKERS AND MONTEREY COUNTY<sup>27</sup>



Over a fifth (22%) of non-workers had a household income between \$100,000 and \$199,000, the largest proportion of all non-workers. Close to half (49%) of all non-workers had a household income above \$75,000. About 5% of non-workers respondents had a household income below \$25,000. (Figure 37)

FIGURE 37. HOUSEHOLD INCOME FOR NON-WORKERS AND ALL RESPONDENTS<sup>28</sup>

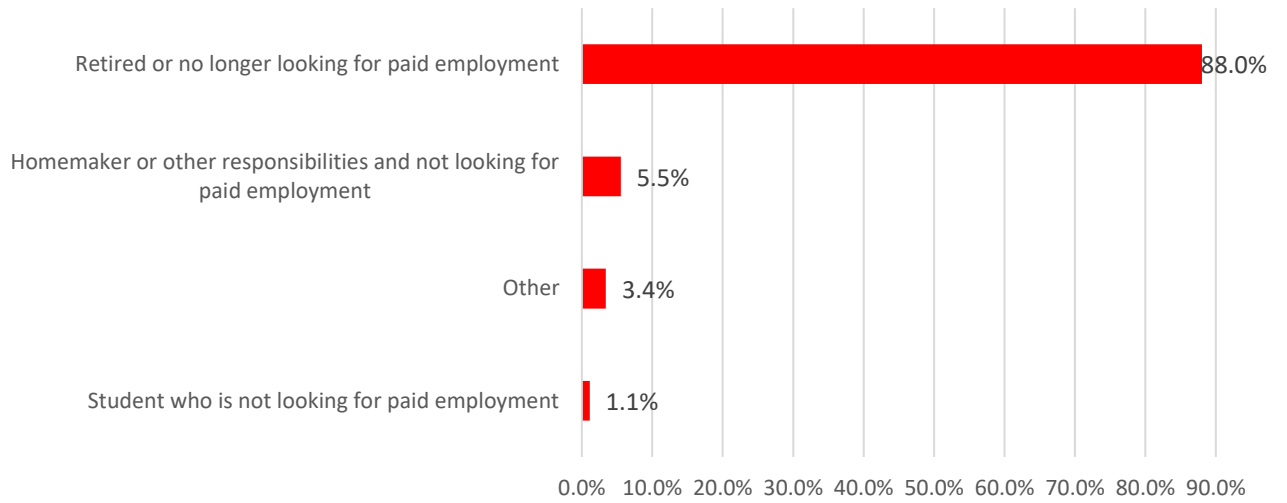


<sup>27</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020.

<sup>28</sup> Bureau of Labor Statistics: ACS 5-Year Estimates, 2020. "Don't know/ Refused" was excluded for non-workers and accounts for the missing 26%.

**Close to nine in ten non-worker respondents (88%) were retired or no longer looking for paid employment.** About one in twenty (6%) respondents were homemakers or had other responsibilities and were not looking for paid employment. (Figure 38)

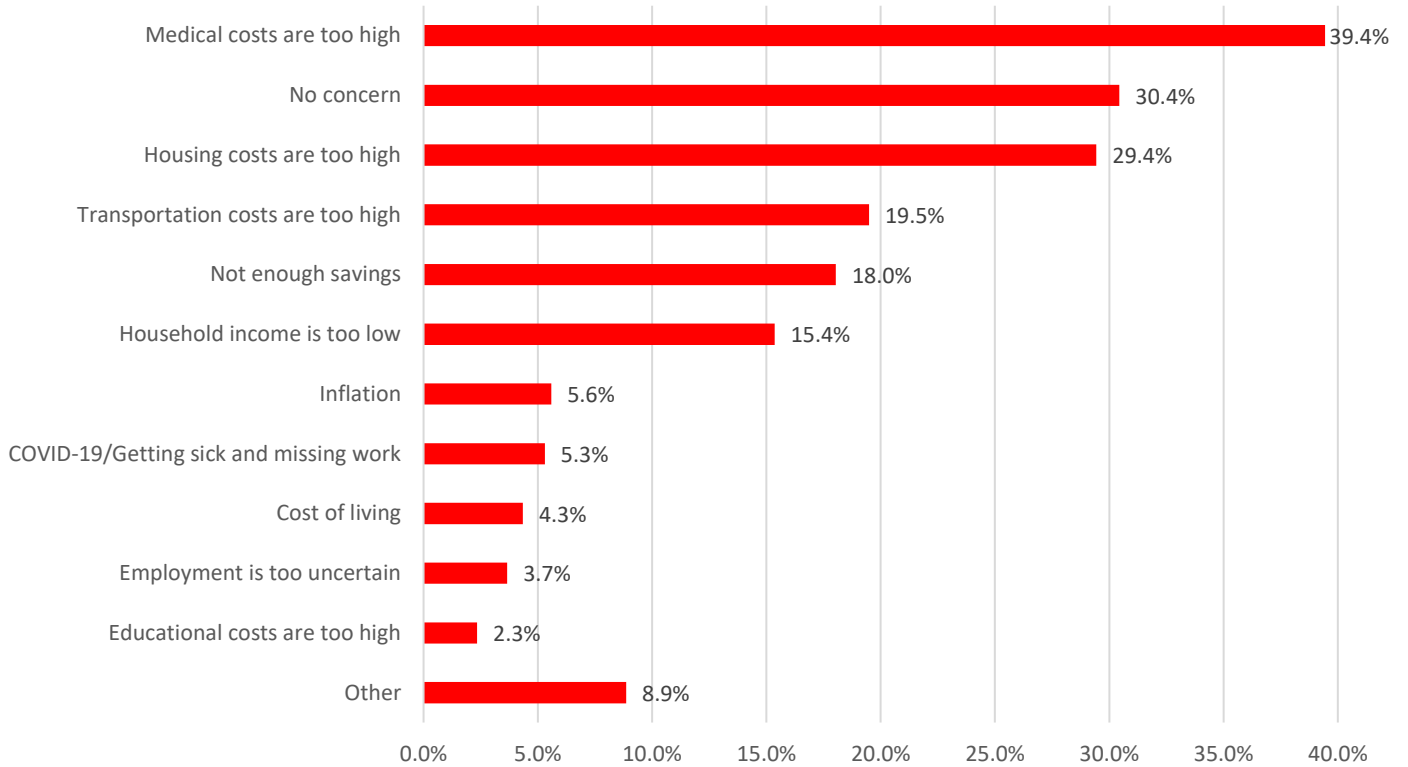
FIGURE 38. NON-WORKERS' CURRENT EMPLOYMENT SITUATION





**Close to four in ten (39%) non-worker respondents reported high medical costs as their biggest concern about their household’s current financial situation.** About three in ten (29%) reported high housing costs as their biggest concern. Thirty percent of non-workers reported no concerns about their household’s current financial situation. Other concerns cited by non-worker respondents included high transportation costs (20%), not enough savings (18%), and low household income (15%). (Figure 39)

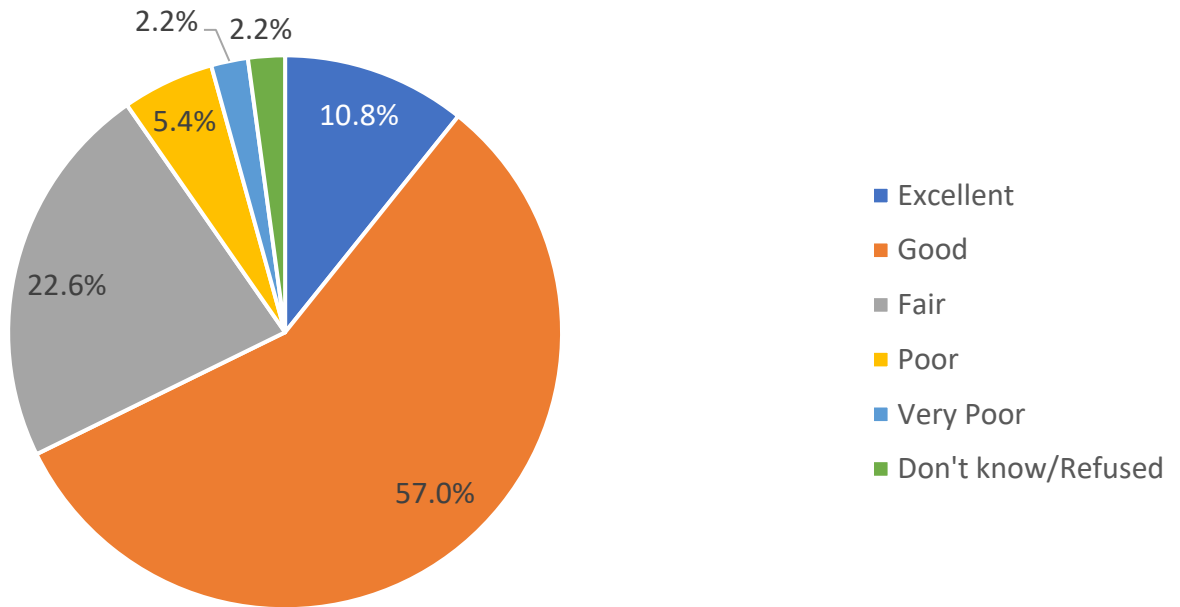
**FIGURE 39. NON-WORKERS' BIGGEST CONCERNS ABOUT THEIR HOUSEHOLD'S CURRENT FINANCIAL SITUATION**



## Monterey County Business Survey

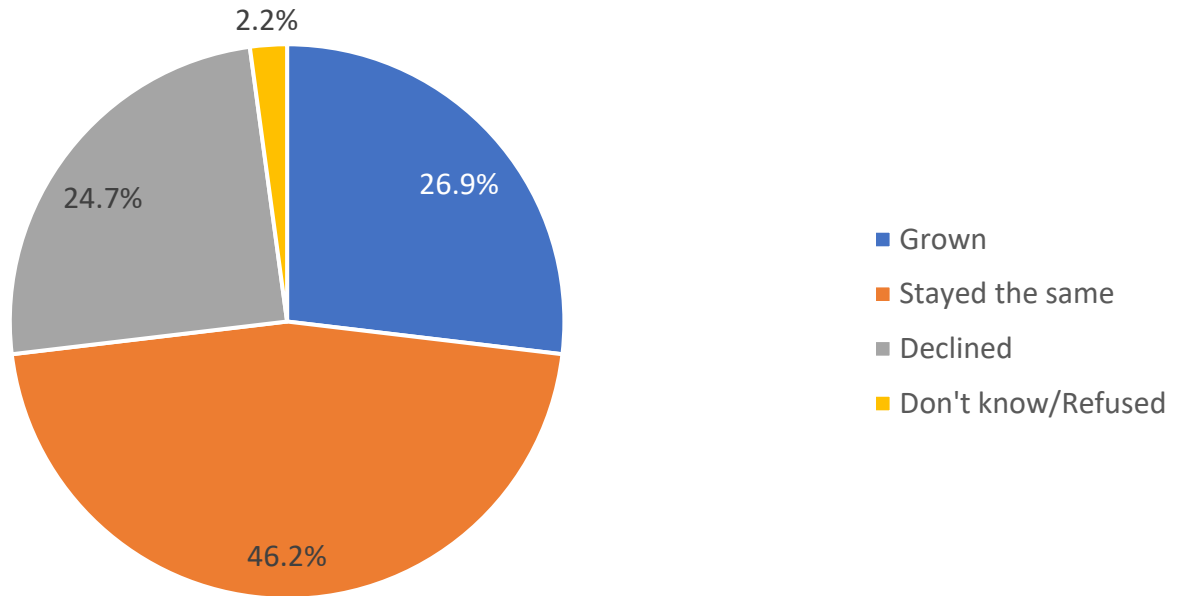
Two in three (68%) business respondents reported that Monterey County is an “excellent” or “good” place to do business, and another 23% of respondents reported the county as a “fair” place to do business. Slightly under one in ten (8%) respondents reported the county as a “poor” or “very poor” place to do business. (Figure 40)

FIGURE 40. MONTEREY COUNTY AS A PLACE TO DO BUSINESS



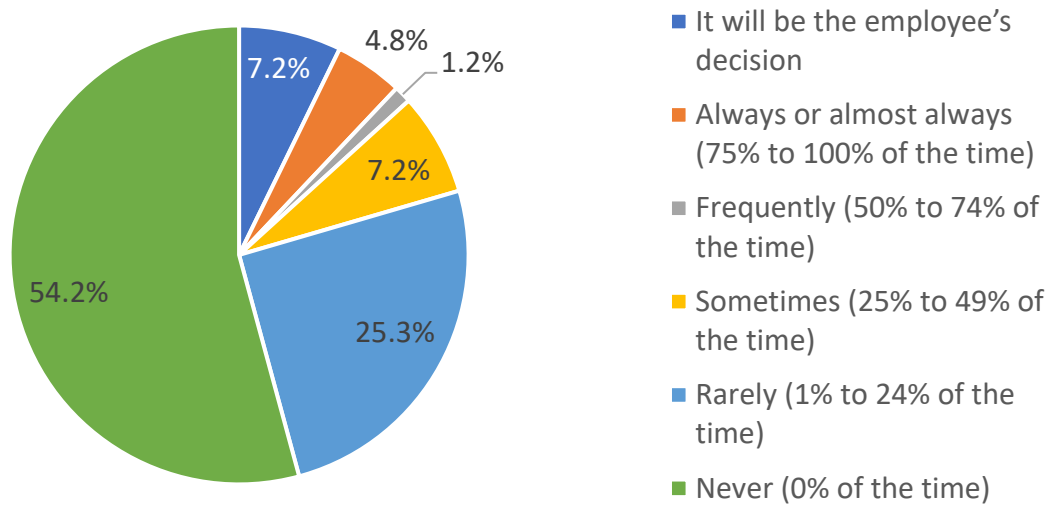
About a quarter (27%) of businesses reported that their business had grown in the number of employees over the last three years, and another quarter (25%) reported that their business declined in number of employees. (Figure 41) Three in four (74%) of the businesses that reported a decline in employment attributed the decline to the COVID-19 pandemic.

FIGURE 41. HAS YOUR BUSINESS GROWN, DECLINED, OR STAYED ABOUT THE SAME IN TERMS OF EMPLOYMENT AT YOU MONTEREY LOCATION?



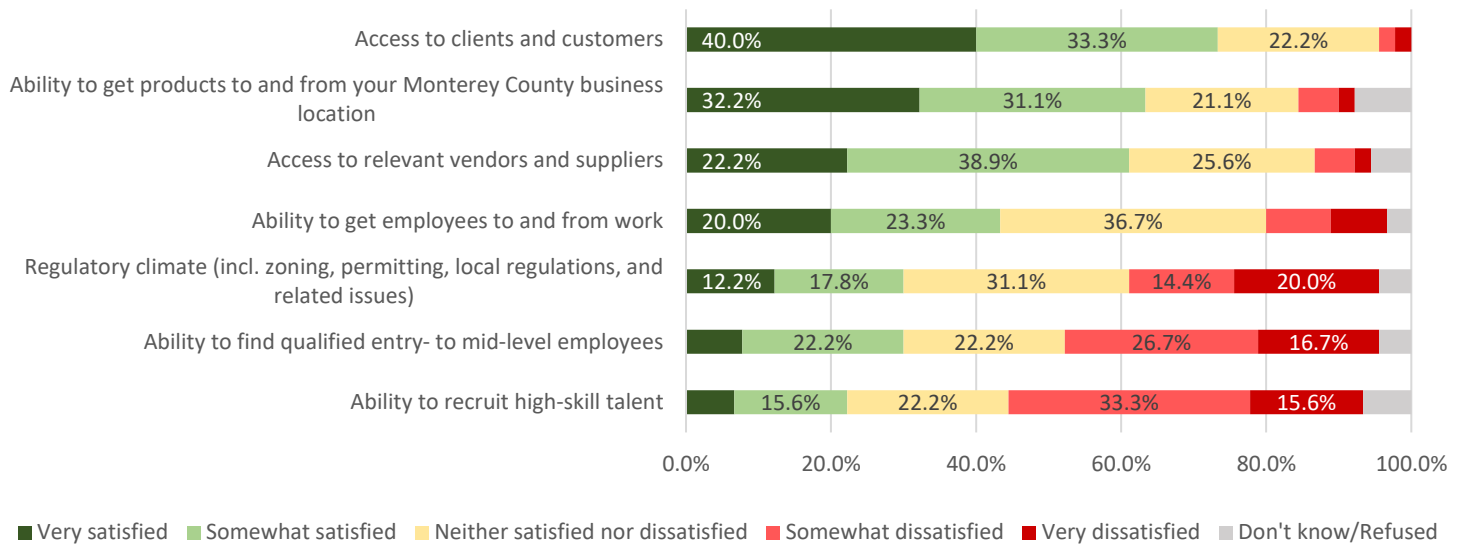
**Most businesses will rarely or never allow their workers to work remotely.** Over half (54%) of the businesses in Monterey County reported that employees will never be able to work remotely. One in four (25%) businesses will allow employees to work remotely between 1 percent and 24 percent of the time, and 13 percent of businesses will allow employees to work remotely more than 25 percent of the time. Slightly under one in ten (7%) of businesses will let employees decide whether to work remotely or in-person. (Figure 42)

FIGURE 42. HOW OFTEN WILL YOUR EMPLOYEES BE ABLE TO WORK REMOTELY



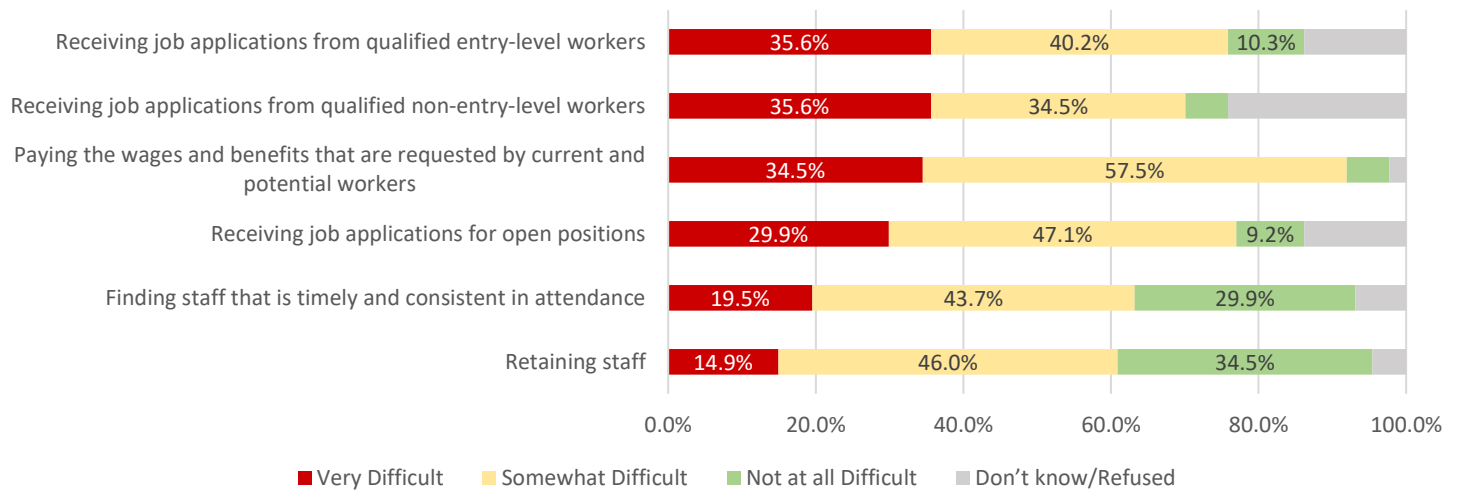
**Monterey County businesses were least satisfied with their ability to find and recruit talent.** Three-in-four (73%) were “Very satisfied” or “Somewhat satisfied” with this aspect of Monterey’s business climate. Businesses were also satisfied with the ability to get products to and from their business location and the access to clients and customers. Businesses were least satisfied with their ability to recruit high-skill talent and to find qualified entry- to mid-level employees in the county. One-in-five businesses were very dissatisfied with Monterey’s regulatory climate i.e., issues related to zoning, permitting, and local regulations (Figure 43).

FIGURE 43. SATISFACTION WITH BUSINESS CLIMATE



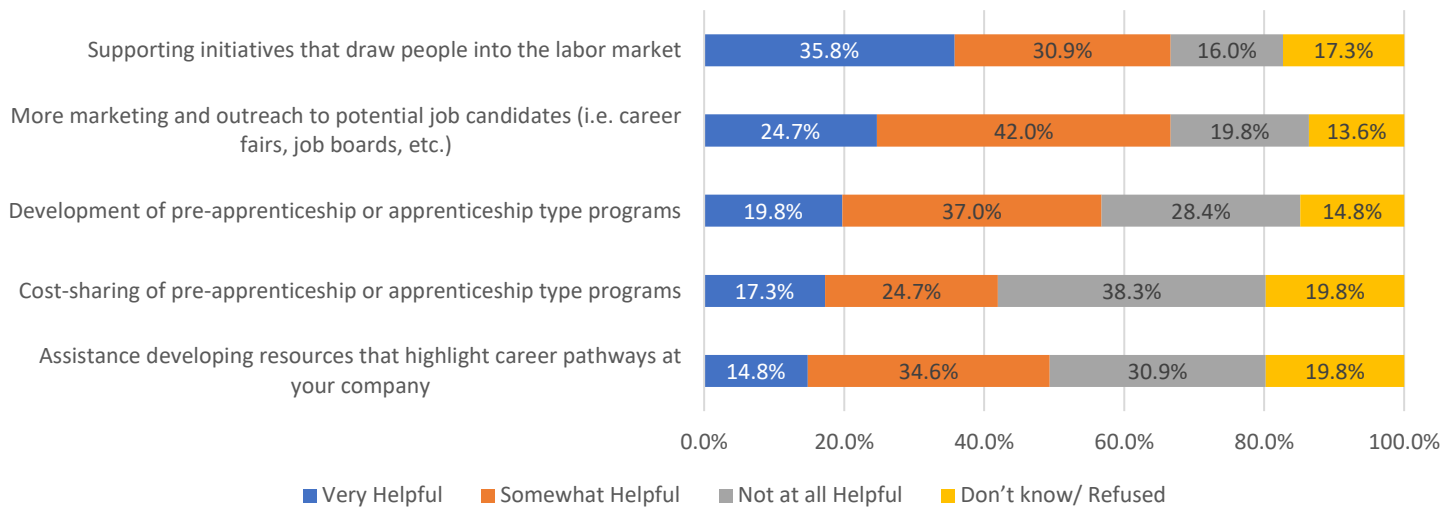
**Receiving applications and paying the requested wages were the greatest workforce-related challenges that businesses reported.** When businesses were asked to state their level of difficulty with the following aspects of the workforce, over a third (36%) of respondents cited receiving job applications from qualified entry-level workers and from non-entry-level workers as “Very difficult”. Paying the wages and benefits requested by current and potential workers was the most difficult workforce aspect to businesses, reported as either “Very difficult” or “Somewhat difficult” by 92% of respondents. Over a third (35%) of businesses reported that retaining their staff was not at all difficult, indicating that Monterey County businesses currently have more difficulty finding new workers rather than retaining current ones. (Figure 44)

FIGURE 44. WORKFORCE DIFFICULTIES



**Assistance in growing the labor market and attracting talent were the most-desired services from the county workforce development board. There is also considerable interest in the development of pre-apprenticeship and apprenticeship programs.** Two in three (67%) businesses reported that more marketing and outreach to potential job candidates and supporting initiatives that draw people to the labor market would be helpful strategies. Over half (57%) of businesses selected the development of pre-apprenticeship or apprenticeship type programs as helpful (very helpful or somewhat helpful). Two in five (38%) businesses described the cost-sharing of pre-apprenticeship or apprenticeship type programs as not at all helpful. (Figure 45)

FIGURE 45. STRATEGIES TO ATTRACT AND RETAIN TALENT



## Appendix A: Survey Methodology

### Business Survey

BW Research conducted employer interviews with businesses throughout Monterey County. The survey sample included known firms in the County as well as online panel through a third party of businesses in Monterey County. The survey instrument was programmed internally by BW Research and each respondent was assigned a unique ID to prevent duplication.

The employer survey was fielded between May 17<sup>th</sup> and June 11<sup>th</sup>, 2022 and resulted in 93 total completes. The average survey duration was 11.2 minutes.

### Resident Survey

BW Research conducted a survey of residents in Monterey County (18 years of age or older). To qualify for the survey, potential respondents had to be residents of Monterey County. The overview of the resident survey methodology is included in the table below. Respondents were recruited through listed sample and online panel of residents 18 years of age or older in Monterey County.

TABLE 1: OVERVIEW OF RESIDENT SURVEY METHODOLOGY

<b>Method</b>	Online Survey (Email & Panel)
<b>Universe</b>	319,627 <sup>29</sup> Residents 18 Years of Age and Older in Monterey County
<b>Number of Respondents</b>	607 Residents Completed a Survey
<b>Average Length</b>	7.2 minutes
<b>Field Dates</b>	May 17 <sup>th</sup> through June 12 <sup>th</sup> , 2022
<b>Margin of Error</b>	The <i>maximum</i> margin of error for questions answered by all 607 respondents was +/-3.97% (95% level of confidence)

<sup>29</sup> American Community Survey (ACS) 2020 5-year estimates



# Appendix B: Resident Survey Toplines



Monterey County WDB

Resident Survey

June 2022

Preliminary Toplines 1.2

n=607

.....

**Introduction:**

Hello, may I please speak to \_\_\_\_\_. Hi, my name is \_\_\_\_\_ and I’m with an independent research firm calling on behalf of the Monterey Workforce Development Board. They would value your participation in a brief survey about the county.

(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!”)

~~~~~

**Screener Questions**

SA. What community do you reside in? [RANDOMIZE]

|              |                            |
|--------------|----------------------------|
| <b>39.8%</b> | <b>Salinas</b>             |
| <b>14.1%</b> | <b>Monterey</b>            |
| <b>6.8%</b>  | <b>Marina</b>              |
| <b>6.0%</b>  | <b>Pacific Grove</b>       |
| <b>5.8%</b>  | <b>Seaside</b>             |
| <b>3.8%</b>  | <b>Carmel-by-the-Sea</b>   |
| <b>3.3%</b>  | <b>Greenfield</b>          |
| <b>3.0%</b>  | <b>Soledad</b>             |
| <b>2.5%</b>  | <b>Carmel Valley</b>       |
| <b>2.1%</b>  | <b>Prunedale</b>           |
| <b>1.8%</b>  | <b>King City</b>           |
| <b>1.2%</b>  | <b>Aromas</b>              |
| <b>1.1%</b>  | <b>Castroville</b>         |
| <b>0.9%</b>  | <b>Pebble Beach</b>        |
| <b>0.8%</b>  | <b>Gonzales</b>            |
| <b>0.7%</b>  | <b>Lockwood</b>            |
| <b>0.6%</b>  | <b>Carmel</b>              |
| <b>0.3%</b>  | <b>Big Sur</b>             |
| <b>0.3%</b>  | <b>Del Rey Oaks</b>        |
| <b>0.1%</b>  | <b>Bradley</b>             |
| <b>0.0%</b>  | <b>Sand City</b>           |
| <b>4.9%</b>  | <b>Other</b>               |
| <b>0.0%</b>  | <b>Don't know/ Refused</b> |

SB. What is your home zip code? (USE ZIP CODES FROM MONTEREY COUNTY)

|               |                                               |
|---------------|-----------------------------------------------|
| <b>100.0%</b> | <b>Please record Monterey County zip code</b> |
| <b>0.0%</b>   | <b>Other</b>                                  |
| <b>0.0%</b>   | <b>Don't know/ refused</b>                    |

SC. What year were you born?

- 0.0%** Less than 18 years old
  - 13.4%** 18 to 24 years old
  - 19.3%** 25 to 34 years old
  - 17.9%** 35 to 44 years old
  - 16.0%** 45 to 54 years old
  - 15.0%** 55 to 64 years old
  - 18.4%** 65 years or older
  - 0.0%** Don't know/ refused
- .....

**I. Introduction**

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

- 2.0%** Less than 1 year
- 7.7%** 1 to 4 years
- 9.0%** 5 to 9 years
- 6.1%** 10 to 14 years
- 75.0%** 15 years or more
- 0.2%** 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?

- 52.7%** Yes, full-time
- 16.1%** Yes, part-time
- 31.2%** No

[IF Q2 = "No" SKIP TO Q16]

3. Are you currently working at more than one job for pay? (n=381)

**19.2% Yes**

**79.5% No**

**1.2% Don't know/ Refused**

IF Q3= "Yes" 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= "Yes, part-time", OTHERWISE SKIP TO Q5]

4. Would you prefer to have a full-time job? (n=93)

**40.7% Yes**

**24.9% No**

**33.2% Depends**

**1.2% Don't know/ Refused**

5. Are you currently working in a permanent position or one that is temporary, contract, or seasonal? (n=381)

**80.2% Permanent**

**9.9% Temporary, or seasonal**

**8.6% Contract**

**1.2% Don't know/ Refused**

[ASK Q6 IF Q5= "Temporary, or seasonal" OR "Contract", OTHERWISE SKIP]

6. Would you prefer to have a permanent position? (n=63)

**51.5% Yes**

**15.5% No**

- 32.1% Depends**
- 1.0% Don't know/ Refused**

7. Over the last two years, when the pandemic began, has your employer changed? (n=381)

- 67.3% No, I am working for the same organization that I did when the pandemic started**
- 16.0% Yes, I changed employers, but I did not stop working during the pandemic**
- 14.9% Yes, I changed employers, and stopped working during at least some of the pandemic**
- 1.8% Don't know/ Refused**

[ASK Q8 IF Q7 = “Yes, I changed employers, but I did not stop working during the pandemic” OR “Yes, I changed employers, and stopped working during at least some of the pandemic”]

8. Have you worked for more than two different employers over the past two years? (n=104)

- 22.9% Yes (please specify how many different employers):**
- 73.6% No**
- 3.5% Don't know/ Refused**

**Yes (please specify how many different employers): (n=24)**

- 61.8% 3 employers**
- 15.3% 4 employers**
- 23.0% 5 employers or more**

[IF Q7 = “Yes, I changed employers, but I did not stop working during the pandemic” OR “Yes, I changed employers, and stopped working during at least some of the pandemic”], ASK Q9, OTHERWISE SKIP]

9. What were your reasons for changing employers? [SELECT ALL THAT APPLY] – *Multiple response permitted; percentages may sum to more than 100%. (n=104)*

- 44.3% More fulfilling career or more related to long-term goals**
- 43.4% Better pay or benefits**
- 31.9% Better company culture**
- 21.8% Need for flexible work schedule**

- 13.3% My previous employer went out of business during the pandemic**
- 6.8% Need for remote work**
- 4.3% Laid off**
- 7.9% Other**
- 3.1% Don't know/refused**

[ASK Q10 IF MORE THAN ONE IS SELECTED IN Q9]

10. What was your primary reason for changing employers? (n=43)

- 45.8% Better pay or benefits**
- 26.7% More fulfilling career or more related to long-term goals**
- 13.5% Better company culture**
- 6.0% Need for flexible work schedule**
- 3.3% My previous employer went out of business during the pandemic**
- 0.0% Need for remote work**
- 4.6% Other (please specify):**
- 0.0% Don't know/ Refused**

11. Does your employer pay for healthcare benefits for you and your family? (n=381)

- 28.4% Yes, but just for myself**
- 34.0% Yes, for me and my family**
- 35.0% No**
- 2.6% Don't know/ Refused**

12. What industry are you currently working in? [ASK OPEN ENDED AND SELECT APPLICABLE PRE-CODE]  
(n=381)

- 21.2% Public Sector or Education**
- 18.9% Healthcare (including Dental)**

- 10.5% Retail or Wholesale Trade**
- 8.3% Professional or Business Services**
- 6.0% Agriculture**
- 5.2% Construction or Building & Design**
- 5.1% Finance, Insurance, Real Estate, or Property Management**
- 4.0% Tourism & Hospitality**
- 2.8% Manufacturing**
- 2.2% Information and Communication Technologies**
- 1.7% Non-Profit**
- 1.7% Sports and Active Lifestyle Manufacturing**
- 1.4% Life Sciences**
- 1.3% Restaurants and Food Services**
- 0.8% Energy or Utilities**
- 0.5% Research and Development**
- 5.7% Other (please specify)**
- 2.6% Don't know/ Refused**

[IF Q7 = “Yes, I changed employers, but I did not stop working during the pandemic” OR “Yes, I changed employers, and stopped working during at least some of the pandemic”], ASK Q13, OTHERWISE SKIP]

13. Is this a different industry than one you were working in before the pandemic? (n=104)

- 47.7% Yes**
- 51.4% No**
- 0.9% Don't know/ Refused**

[Ask Q14 if Q13 = “Yes”]

14. What industry were you previously working in? [ASK OPEN ENDED AND SELECT APPLICABLE PRE-CODE] (n=47)

- 21.6% Retail or Wholesale Trade**
- 14.5% Restaurants and Food Services**

- 10.3% Public Sector or Education**
- 8.0% Healthcare**
- 7.0% Construction or Building and Design**
- 6.6% Tourism & Hospitality**
- 6.5% Professional or Business Services**
- 5.5% Manufacturing**
- 4.2% Transportation and Warehousing**
- 3.1% Information and Communication Technologies (ICT)**
- 1.2% Agriculture**
- 1.0% Finance, Insurance, Real Estate, or Property Management**
- 7.1% Other**
- 3.5% Don't know/ Refused**

15. What is your occupation or positional title? (n=381)

- 18.0% Administrator, Supervisor, Management, Coordinator, or Director**
- 12.4% Medical Assistant, Registered Nurse or Healthcare/therapy provider**
- 10.9% Teacher/professor or work with children/ students**
- 8.1% Assistant, associates, specialist, or administrative support**
- 7.8% Maintenance Technician, Machinery, Carpenter, Inspector, Plumbing, Construction or Contractor**
- 5.5% Accountant, analyst, bookkeeper, or controller**
- 4.2% Sales**
- 4.0% Owner, CEO, or President**
- 3.6% Human Resources or Customer services**
- 3.4% Engineer, Electrician, or Information Technology**
- 3.2% Cook or Food Services**



- 2.8% Cashier or Retail Associate**
- 2.4% Finance or real estate**
- 2.4% First responder, security, or public safety**
- 1.5% Lawyer or paralegal**
- 1.4% Government employee**
- 6.9% Other**
- 1.4% Don't know/ Refused**

## **II. Unemployment Profile**

[ASK Q16 IF Q2 = "No", OTHERWISE SKIP TO Q26]

16. Which of the following descriptions is closest to your current situation? (n=226)

- 54.1% Retired or no longer looking for paid employment**
- 11.9% Unemployed, and actively looking for work**
- 9.6% Homemaker or other responsibilities and not looking for paid employment**
- 8.1% Student who is not looking for paid employment**
- 4.7% Unemployed, and NOT actively looking for work**
- 9.6% Other (Please specify)**
- 2.1% Don't know/ Refused**

[ASK Q17 IF Q16 = "Unemployed, and actively looking for work" OR "Unemployed, and NOT actively looking for work", OTHERWISE SKIP]

17. Were you working or looking for work when the pandemic started to impact the US economy, in February or March of 2020? (n=21)

- 51.5% Yes, I was working full-time when the pandemic started**
- 6.0% Yes, I was working part-time when the pandemic started**
- 16.1% Yes, I was actively looking for work when the pandemic started**

- 22.6%** No, I was not working or looking for work when the pandemic started
- 3.8%** Don't know/ Refused

18. How long have you been out of work? (n=226)

- 2.1%** Two weeks or less
- 4.9%** More than two weeks but less than two months
- 4.4%** More than two months but less than six months
- 5.7%** More than six months but less than a year
- 14.5%** One to two years
- 63.7%** More than two years
- 4.7%** Don't know/ Refused

19. Do you expect to go back to work or look for paid employment at any point in the future? (n=226)

- 37.9%** Yes
- 53.9%** No
- 8.2%** Don't know/ Refused

[IF Q19 = "Yes" OR "Don't know/ Refused", ASK Q20, OTHERWISE SKIP]

20. What factors might make you likely to start working again? [SELECT ALL THAT APPLY] [RANDOMIZE] – Multiple response permitted; percentages may sum to more than 100%. (n=80)

- 59.1%** Flexible work schedule
- 54.6%** Better pay or benefits
- 46.2%** More fulfilling career or more related to long-term goals
- 42.3%** Working remotely
- 26.0%** Better company culture
- 6.7%** Affordable childcare
- 2.2%** None, I will not be going back to work
- 6.5%** Other
- 6.8%** Don't know/refused

[IF Q19 = “Yes” OR “Don’t know/ Refused”, ASK Q21, OTHERWISE SKIP]

21. What resources will you use to look for a new job? [SELECT ALL THAT APPLY] [RANDOMIZE] – *Multiple response permitted; percentages may sum to more than 100%. (n=80)*

- 58.0% Indeed**
- 55.0% Friends or family**
- 38.4% Local job board**
- 28.0% LinkedIn**
- 26.6% Social media (Instagram, Facebook, TikTok, etc.)**
- 7.3% Other**
- 13.4% Don’t know/refused**

[ASK Q22 IF Q19 = “Yes” OR “Don’t know/ Refused” OTHERWISE SKIP]

22. When do you expect to go back to work? (n=80)

- 11.6% Two weeks or less**
- 19.9% More than two weeks but less than two months**
- 19.1% More than two months but less than six months**
- 12.0% More than six months but less than a year**
- 12.3% One to two years**
- 0.0% More than two years**
- 25.0% Don't know/ Refused**

[ASK Q23 IF Q19 = “Yes” OR “Don’t know/ Refused” OTHERWISE SKIP]

23. Do you expect to go back to work or look for paid employment, in Monterey County or somewhere outside of the County? (n=80)

- 76.2% In Monterey County**
- 8.8% Outside Monterey County**
- 15.1% Don't know/ Refused**

[DO NOT ASK IF Q16 = “Retired or no longer looking for paid employment”]

24. What is the primary reason you are not working for pay, now? (n=75)

- 20.9% Unable to find work that fit my skills, or within my location**
- 19.7% Student**
- 19.5% Homemaker or caring for a family member**
- 16.7% Short term injury/ disabled**
- 8.8% No need for work/ spouse makes enough money**
- 7.8% Other**
- 6.7% Don't know/ refused**

25. Now I’m going to read a list of statements that describe different attitudes and opinions regarding current and future work and employment. Please indicate whether you generally agree, disagree, or neither agree nor disagree with the following statements.

Here is the (first/next) one: \_\_\_\_\_ Do you generally agree, disagree or neither agree nor disagree with the statement? (GET ANSWER IF AGREE OR DISAGREE ASK:) Would that be strongly (agree/disagree) or somewhat (agree/disagree)?

**RANDOMIZE**

|                                                                                                                      | <u>Strongly Agree</u> | <u>Somewhat Agree</u> | <u>Neither Agree nor Disagree</u> | <u>Somewhat Disagree</u> | <u>Strongly Disagree</u> | <u>Not relevant</u> | <u>Don't know/ Refused</u> |
|----------------------------------------------------------------------------------------------------------------------|-----------------------|-----------------------|-----------------------------------|--------------------------|--------------------------|---------------------|----------------------------|
| <b>A. The pandemic made it harder to live and work in Monterey County</b>                                            | <b>35.6%</b>          | <b>21.5%</b>          | <b>16.6%</b>                      | <b>6.9%</b>              | <b>8.4%</b>              | <b>8.9%</b>         | <b>2.1%</b>                |
| <b>B. I am looking for a new industry or career pathway so I can better afford to live and work in the community</b> | <b>22.8%</b>          | <b>15.3%</b>          | <b>13.5%</b>                      | <b>6.9%</b>              | <b>14.5%</b>             | <b>24.2%</b>        | <b>2.8%</b>                |
| <b>C. My current level education will allow me to find meaningful and well-paid employment in the region</b>         | <b>27.9%</b>          | <b>24.3%</b>          | <b>16.0%</b>                      | <b>9.9%</b>              | <b>7.8%</b>              | <b>11.4%</b>        | <b>2.8%</b>                |
| <b>D. I am looking for a more affordable place to live and work</b>                                                  | <b>29.2%</b>          | <b>15.1%</b>          | <b>14.1%</b>                      | <b>4.9%</b>              | <b>16.2%</b>             | <b>18.6%</b>        | <b>1.9%</b>                |

|                                                                                             |       |       |       |       |       |       |      |
|---------------------------------------------------------------------------------------------|-------|-------|-------|-------|-------|-------|------|
| E. Rent and housing costs have made it hard to live and work in my community                | 54.2% | 19.4% | 7.5%  | 2.8%  | 4.9%  | 9.4%  | 1.8% |
| F. Childcare costs and availability make it hard to work in my community                    | 29.4% | 8.9%  | 11.9% | 2.6%  | 3.2%  | 36.8% | 7.2% |
| G. Now is a good time to find and get the job I want                                        | 13.4% | 17.0% | 24.4% | 11.4% | 9.5%  | 20.1% | 4.2% |
| H. It is getting harder to live and work in Monterey County                                 | 50.8% | 23.1% | 10.3% | 3.1%  | 4.6%  | 5.7%  | 2.4% |
| I. Job opportunities are getting better for people like me in this region                   | 9.7%  | 13.1% | 26.6% | 13.4% | 17.6% | 12.9% | 6.8% |
| J. I am no longer willing to work in a job that I don't see a good future in                | 39.3% | 16.6% | 15.8% | 3.6%  | 4.1%  | 18.4% | 2.3% |
| K. I am afraid I or my family will get severely ill from COVID-19                           | 17.7% | 21.6% | 17.4% | 13.1% | 19.2% | 8.3%  | 2.7% |
| L. Government stimulus money helped me take time to reconsider my career                    | 9.8%  | 10.6% | 17.2% | 5.9%  | 27.0% | 26.1% | 3.4% |
| M. Since the pandemic began, I am becoming more selective about where I am willing to work. | 26.3% | 18.6% | 18.9% | 3.8%  | 7.7%  | 22.6% | 2.2% |
| N. I feel confident about my ability to find a job I am interested in.                      | 30.4% | 26.4% | 12.4% | 8.7%  | 4.7%  | 15.5% | 2.0% |
| O. I feel confident about my ability to apply for a job I am interested in                  | 34.8% | 25.8% | 11.7% | 7.5%  | 3.0%  | 14.5% | 2.8% |

III. Childcare Assessment

26. Are there any children under 18 years of age that live in your household?

34.4% Yes

65.6% No

[IF Q26 = "No" SKIP TO Q29]

27. Please select the age categories for each of your children under the age of 18 [SELECT ALL THAT APPLY] – Multiple response permitted; percentages may sum to more than 100%. (n=184)

- 19.2% Up to two years old
- 23.2% Older than two years, up to four years old
- 28.9% Older than four years, up to eight years old
- 35.8% Older than eight, up to 14 years old
- 21.7% Older than 14, up to 16 years old
- 20.5% Older than 16, under 18

[IF Q27 = “Up to two years old”, “Older than two years, up to four years old”, “Older than four years, up to eight years old”, OR “Older than eight, up to 14 years old” ASK Q28, OTHERWISE SKIP]

28. Is it difficult to find quality and affordable childcare that allows you and/or your spouse to work?  
(n=140)

- 42.9% Yes, it is very difficult to find
- 27.1% Yes, it is somewhat difficult to find
- 7.5% No, it is not difficult to find
- 5.5% Childcare is not required for my children
- 17.0% Don’t know/ Refused

**IV. Economic Prospects**

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

29. Please tell us how challenging each of the following are when trying to advance your career:  
[RANDOMIZE]

|                                                                       | <u>Very Challenging</u> | <u>Somewhat Challenging</u> | <u>A Little or Not Challenging</u> | <u>Don’t know/ Refused</u> |
|-----------------------------------------------------------------------|-------------------------|-----------------------------|------------------------------------|----------------------------|
| <b>A. Getting the right degree or formal educational background</b>   | 19.3%                   | 29.6%                       | 32.9%                              | 18.1%                      |
| <b>B. Getting work or industry experience</b>                         | 21.4%                   | 30.4%                       | 30.8%                              | 17.5%                      |
| <b>C. Meeting or getting in contact with those that could hire me</b> | 17.6%                   | 36.3%                       | 30.0%                              | 16.0%                      |

|                                                      |              |              |              |              |
|------------------------------------------------------|--------------|--------------|--------------|--------------|
| <b>D. Finding the right employment opportunities</b> | <b>27.5%</b> | <b>35.0%</b> | <b>21.4%</b> | <b>16.1%</b> |
| <b>E. Developing a good resume or interview</b>      | <b>14.0%</b> | <b>27.6%</b> | <b>44.1%</b> | <b>14.3%</b> |
| <b>F. Finding or paying for daycare</b>              | <b>21.2%</b> | <b>13.1%</b> | <b>15.2%</b> | <b>50.5%</b> |

30. Are there any other challenges as you look to advance your career?

- 42.1% None, I have the career or position that I am interested in**
- 14.1% Costs of living or finding a job with sufficient pay/benefits**
- 6.4% Finding employment opportunities that fit background, experience and in location**
- 6.2% Access to formal educational or resources/ technology to perform job**
- 5.9% Retired or looking to retire**
- 4.2% Age**
- 4.2% Limited by personal, physical, or mental ability to work**
- 8.4% Other**
- 8.6% Don't know/Refused**

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

- 10.5% Much more likely**
- 13.4% Somewhat more likely**
- 52.2% No change**
- 6.1% Somewhat less likely**
- 7.8% Much less likely**
- 9.9% Don't know/Refused**

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

- 14.3% Get better**
- 34.9% Stay the same**
- 33.6% Get worse**

**17.2% Don't know/Refused**

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

**17.0% Get better**

**20.2% Stay the same**

**47.5% Get worse**

**15.4% Don't know/Refused**

34. What is your biggest concern about your household's current financial situation? [DO NOT READ, ALLOW TWO RESPONSES] – *Multiple response permitted; percentages may sum to more than 100%.*

**48.4% Housing costs are too high**

**26.0% Medical costs are too high**

**23.6% Not enough savings**

**23.1% Household income is too low**

**19.3% Transportation costs are too high**

**16.3% No concern**

**11.2% Educational costs are too high**

**8.0% COVID-19/Getting sick and missing work**

**6.2% Employment is too uncertain**

**3.6% Cost of living**

**2.3% Inflation**

**4.9% Other**

**6.4% Don't know/Refused**



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

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

- 1.7%** Less than high school
- 14.2%** High school diploma or GED
- 24.8%** Some college
- 13.8%** Post high school certificate or Associate Degree (A.A. or A.S.)
- 26.2%** Four-year Bachelor's Degree (B.A. or B.S.)
- 19.4%** Graduate school (M.S., MBA, M.A., Ph.D., M.D., J.D....)
- 0.0%** Don't know/Refused

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

- 36.7%** Yes (Please specify)
- 61.7%** No
- 1.6%** Don't know/Refused

**Yes (Please specify) (n=193)**

- 80.2%** Spanish
- 4.2%** French
- 3.5%** Tagalog
- 2.2%** Japanese
- 1.3%** Arabic
- 0.9%** German
- 0.6%** Russian
- 7.0%** Other

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

- 50.9% White**
- 32.5% Hispanic or Latino**
- 6.0% Asian**
- 2.9% Pacific Islander**
- 1.7% Black or African American**
- 0.2% American Indian/ Alaskan Native**
- 1.8% Other (Please specify)**
- 4.0% Don't know/Refused**

SD. What is your gender?

- 50.6% Male**
- 48.9% Female**
- 0.5% Other (please specify):**

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

- 59.8% Own**
- 28.0% Rent**
- 9.1% Neither**
- 3.1% Don't know/Refused**

SF. Including yourself, please tell me how many adults 18 years of age or older live in your household?

- 17.6% 1 adult**

- 45.2% 2 adults
- 14.2% 3 adults
- 8.1% 4 adults
- 5.7% 5 adults or more
- 9.2% Don't know/ Refused

SG. 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):

- 6.1% Below \$10,000
- 9.1% \$10,000 to \$24,999
- 16.8% \$25,000 to \$49,999
- 18.4% \$50,000 to \$74,999
- 8.5% \$75,000 to \$99,999
- 14.1% \$100,000 to \$149,999
- 14.5% \$150,000 or more
- 12.6% Don't know/ Refused

SH. 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):

- 7.3% Below \$25,000
- 13.2% \$25,000 to \$49,999
- 17.3% \$50,000 to \$74,999
- 11.4% \$75,000 to \$99,999
- 23.3% \$100,000 to \$199,999
- 13.5% \$200,000 or More
- 14.0% 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: Business Survey Toplines



Monterey County  
Business Survey  
May 2022  
Preliminary Toplines 1.2  
n=93

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**Introduction:**

**[24 employees or less]**

Hello, my name is \_\_\_\_\_. May I please speak to a manager or owner at [firm name]?

**[25 employees or more]**

Hello, my name is \_\_\_\_\_. May I please speak to a manager or a decision maker who is involved in strategic planning or human resources at [firm name]?

I am calling on behalf of BW Research, an independent research organization working on behalf of the Monterey County Workforce Development Board to better understand the needs of businesses in the County.

The survey will take approximately 10 minutes of your time and will help the County better serve those businesses in your community.

**[IF NEEDED]:** The survey is being conducted by BW Research, an independent research organization, and should take approximately 10 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.

### Part 1. Screener Questions

---

A. Are you involved or leading the strategic planning, hiring or location decisions at your firm?

100.0% Yes

- 0.0% No**
- 0.0% Not sure**

B. Please describe your role:

- 67.7% Owner**
- 20.4% Member of executive leadership team**
- 9.7% Manager**
- 2.2% Human resources**
- 0.0% Other**

C. Is your business located in Monterey County? [IF YES] How many business locations does your firm have in Monterey County?

- 80.6% Yes, we have one Monterey County location**
- 19.4% Yes, we have multiple Monterey County location**
- 0.0% No**
- 0.0% Not Sure**

**Yes, we have multiple Monterey County locations (n=18)**

- 72.2% 2 to 5 locations**
- 16.7% 6 to 9 locations**
- 5.6% 10 locations or more**
- 5.6% Don't know/ Refused**

## **Part 2. Profile & Growth Expectations**

---

1. How many years have you had a business location in Monterey County?

- 0.0% Less than a year**
- 0.0% 1 to 2 years**
- 8.6% 2 to 5 years**

- 7.5%** 5 to 10 years
- 24.7%** 10 to 20 years
- 59.1%** 20 years or more
- 0.0%** Don't know/Refused

2. Did you relocate, add an additional location, or start your business in Monterey County?

- 91.4%** Our business started in Monterey County
- 4.3%** Our business relocated to Monterey County
- 3.2%** Our business added a location in Monterey County
- 1.1%** Don't know/Refused

Next, I want to ask a few quick questions about your Monterey County business location(s).

3. What were the main reasons your company located in Monterey County? [RANDOMIZE]

- 60.2%** Founders lived here
- 12.9%** Proximity to customers, collaborators, and vendors
- 7.5%** Quality of life in Monterey County
- 6.5%** Spun-off another company that was already here
- 0.0%** Connection or proximity to university or related institutions
- 0.0%** Proximity to skilled workers/workforce
- 8.6%** Other
- 4.3%** Don't know/Refused

4. What industry or industries best describes the work that your firm is involved in and connected to?

- 16.1%** Professional or Business Services
- 15.1%** Tourism & Hospitality
- 10.8%** Retail or Wholesale Trade
- 8.6%** Healthcare
- 8.6%** Finance, Insurance, Real Estate, or Property Management
- 6.5%** Manufacturing
- 6.5%** Agriculture

- 4.3% Entertainment and Recreation
- 4.3% Information and Communications Technology
- 4.3% Restaurant or Food Services
- 2.2% Construction or Building and Design
- 2.2% Public Sector or Education
- 2.2% Transportation and Warehousing
- 1.1% Energy or Utilities
- 7.5% Other
- 0.0% Don't know/Refused

I'd like to ask a few general questions about your employees at your Monterey County location(s).

5. Including all full-time and part-time employees, how many **permanent and temporary** employees work at your Monterey County location(s)? [DO NOT ACCEPT 0 AS A RESPONSE]

**Number of Employees: (n=89)**

- 15.7% 1 to 2 employees
- 24.7% 3 to 5 employees
- 11.2% 6 to 9 employees
- 30.3% 10 to 25 employees
- 5.6% 25 to 49 employees
- 12.4% 50 employees or more

6. If you currently have [INSERT Q5 #] **permanent and temporary** employees at your location(s), how many more or how many fewer employees do you expect to have at your Monterey County location(s) 12 months from now?

- 41.9% More
- 6.5% Fewer
- 46.2% Same Number of Employees
- 5.4% Don't know/Refused



**More (n=39)**

- 48.7% 1 to 2 employees**
- 28.2% 3 to 5 employees**
- 7.7% 6 to 9 employees**
- 5.1% 10 to 25 employees**
- 5.1% 25 to 49 employees**
- 5.1% 50 employees or more**

**Fewer (=6)**

- 16.7% 1 to 2 employees**
- 16.7% 3 to 5 employees**
- 33.3% 6 to 9 employees**
- 16.7% 10 to 25 employees**
- 0.0% 25 to 49 employees**
- 16.7% 50 employees or more**

**Employer Projected Growth = 1.2%**

[IF AMOUNT DIFFERS BY 10% OR MORE IN EITHER DIRECTION, ASK]

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

**[IF Q6 = "More", ASK Q7, OTHERWISE SKIP]**

7. Which types of positions does your firm expect to add over the next 12 months? (n=39)

- 10.3% Entry-level**
- 20.5% Experienced**
- 69.2% A mix of both entry-level and experienced**

**0.0% Don't know/Refused**

8. Over the last three years, has your company grown, declined or stayed about the same, in terms of employment at your Monterey location(s).

**26.9% Grown**

**46.2% Stayed the same**

**24.7% Declined**

**2.2% Don't know/Refused**

**[IF Q8 = "Declined", ASK Q9, OTHERWISE SKIP]**

9. Is the decline a result of the impacts of COVID-19? (n=23)

**73.9% Yes**

**17.4% No**

**8.7% Don't know/Refused**

## Part 3. Business Climate

---

Now, I would like to ask you about the general business climate in the Monterey County.

10. Overall, how would you rate the Monterey County as a place to do business?

- 10.8% Excellent
- 57.0% Good
- 22.6% Fair
- 5.4% Poor
- 2.2% Very Poor
- 2.2% Don't know/Refused

11. Please tell me how satisfied your company is with the following issues and attributes regarding Monterey County's business climate. (n=90)

### RANDOMIZE

|                                                                               | <u>Very satisfied</u> | <u>Somewhat satisfied</u> | <u>Neither satisfied nor dissatisfied</u> | <u>Somewhat dissatisfied</u> | <u>Very dissatisfied</u> | <u>Don't know/Refused</u> |
|-------------------------------------------------------------------------------|-----------------------|---------------------------|-------------------------------------------|------------------------------|--------------------------|---------------------------|
| A. Ability to get employees to and from work                                  | 20.0%                 | 23.3%                     | 36.7%                                     | 8.9%                         | 7.8%                     | 3.3%                      |
| B. Ability to get products to and from your Monterey County business location | 32.2%                 | 31.1%                     | 21.1%                                     | 5.6%                         | 2.2%                     | 7.8%                      |
| C. Access to clients and customers                                            | 40.0%                 | 33.3%                     | 22.2%                                     | 2.2%                         | 2.2%                     | 0.0%                      |
| D. Ability to recruit high-skill talent                                       | 6.7%                  | 15.6%                     | 22.2%                                     | 33.3%                        | 15.6%                    | 6.7%                      |
| E. Ability to find qualified entry to mid-level employees                     | 7.8%                  | 22.2%                     | 22.2%                                     | 26.7%                        | 16.7%                    | 4.4%                      |
| F. Access to relevant vendors and suppliers                                   | 22.2%                 | 38.9%                     | 25.6%                                     | 5.6%                         | 2.2%                     | 5.6%                      |

---

|                                                                                                |              |              |              |              |              |             |
|------------------------------------------------------------------------------------------------|--------------|--------------|--------------|--------------|--------------|-------------|
| <b>G. Regulatory climate (incl. zoning, permitting, local regulations, and related issues)</b> | <b>12.2%</b> | <b>17.8%</b> | <b>31.1%</b> | <b>14.4%</b> | <b>20.0%</b> | <b>4.4%</b> |
|------------------------------------------------------------------------------------------------|--------------|--------------|--------------|--------------|--------------|-------------|

35. Now I'm going to read a list of statements that describe different attitudes and opinions regarding current and future work and employment. Please indicate whether you generally agree, disagree, or neither agree nor disagree with the following statements. (n=89)

Here is the (first/next) one: \_\_\_\_\_ Do you generally agree, disagree or neither agree nor disagree with the statement? (GET ANSWER IF AGREE OR DISAGREE ASK:) Would that be strongly (agree/disagree) or somewhat (agree/disagree)?

RANDOMIZE

|                                                                                              | <u>Strongly Agree</u> | <u>Somewhat Agree</u> | <u>Neither Agree nor Disagree</u> | <u>Somewhat Disagree</u> | <u>Strongly Disagree</u> | <u>Don't know/Not Applicable</u> |
|----------------------------------------------------------------------------------------------|-----------------------|-----------------------|-----------------------------------|--------------------------|--------------------------|----------------------------------|
| <b>A. The pandemic made it harder to live and work in Monterey County</b>                    | 27.0%                 | 29.2%                 | 31.5%                             | 6.7%                     | 5.6%                     | 0.0%                             |
| <b>B. Rent and housing costs have made it hard to live and work in my community</b>          | 65.2%                 | 20.2%                 | 6.7%                              | 4.5%                     | 2.2%                     | 1.1%                             |
| <b>C. Childcare costs and availability make it hard to work in my community</b>              | 27.0%                 | 25.8%                 | 21.3%                             | 1.1%                     | 0.0%                     | 24.7%                            |
| <b>D. It is getting harder to live and work in Monterey County</b>                           | 47.2%                 | 30.3%                 | 12.4%                             | 7.9%                     | 1.1%                     | 1.1%                             |
| <b>E. Job opportunities are getting better for people in this region</b>                     | 5.6%                  | 27.0%                 | 31.5%                             | 19.1%                    | 10.1%                    | 6.7%                             |
| <b>F. I am afraid I or my family will get severely ill from COVID-19</b>                     | 4.5%                  | 13.5%                 | 36.0%                             | 9.0%                     | 33.7%                    | 3.4%                             |
| <b>G. My company has a great work culture and environment</b>                                | 65.2%                 | 24.7%                 | 9.0%                              | 0.0%                     | 0.0%                     | 1.1%                             |
| <b>H. My employees are afraid they or their families will get severely ill from COVID-19</b> | 3.4%                  | 13.5%                 | 39.3%                             | 20.2%                    | 15.7%                    | 7.9%                             |

12. Please tell me how difficult the following workforce aspects are for your company: (n=87)

**RANDOMIZE**

|                                                                                      | <u>Very<br/>Difficult</u> | <u>Somewhat<br/>Difficult</u> | <u>Not at all<br/>Difficult</u> | <u>Don't<br/>know/<br/>Refused</u> |
|--------------------------------------------------------------------------------------|---------------------------|-------------------------------|---------------------------------|------------------------------------|
| A. Receiving job applications for open positions                                     | 29.9%                     | 47.1%                         | 9.2%                            | 13.8%                              |
| B. Receiving job applications from qualified entry-level workers                     | 35.6%                     | 40.2%                         | 10.3%                           | 13.8%                              |
| C. Finding staff that is timely and consistent in attendance                         | 19.5%                     | 43.7%                         | 29.9%                           | 6.9%                               |
| D. Retaining staff                                                                   | 14.9%                     | 46.0%                         | 34.5%                           | 4.6%                               |
| E. Receiving job applications from qualified non-entry-level workers                 | 35.6%                     | 34.5%                         | 5.7%                            | 24.1%                              |
| F. Paying the wages and benefits that are requested by current and potential workers | 34.5%                     | 57.5%                         | 5.7%                            | 2.3%                               |

13. Which of the following is most difficult when it comes to ensuring you have the appropriate number and quality of workers? (n=87)

- 42.5% Getting applications for open positions
- 14.9% Developing new hires
- 14.9% Retaining existing workers
- 13.8% Getting applicants through the application and onboarding process
- 13.8% Don't know/Refused

14. Which resources did you use most often **before the pandemic** to find potential workers? [SELECT ALL THAT APPLY] – Multiple response permitted; percentages may sum to more than 100%. (n=86)

- 60.5% Friends and Family
- 57.0% Craigslist or Indeed
- 29.1% Local college job board
- 19.8% A Staffing Agency
- 12.8% LinkedIn
- 5.8% Social media
- 5.8% A recruiter or headhunter

- 7.0% Other
- 4.7% Don't know/ Refused

15. Which resources do you use most often **now** to find potential workers? [SELECT ALL THAT APPLY] – *Multiple response permitted; percentages may sum to more than 100%. (n=85)*

- 52.9% Craigslist or Indeed
- 50.6% Friends and Family
- 23.5% Local college job board
- 11.8% A Staffing Agency
- 9.4% LinkedIn
- 8.2% A recruiter or headhunter
- 4.7% Social media
- 8.2% Other
- 7.1% Don't know/ Refused

16. What benefits and compensation does your company now offer workers that it did not offer before the pandemic? [SELECT ALL THAT APPLY] [RANDOMIZE] – *Multiple response permitted; percentages may sum to more than 100. (n=84)*

- 47.6% None, we offer the same wages and benefits now as before the pandemic.
- 45.2% Higher wages
- 17.9% 401k or other retirement savings options
- 11.9% In-house career advancement opportunities
- 8.3% Education tuition reimbursement
- 8.3% Health insurance for individuals and their family
- 4.8% Health insurance for individuals
- 3.6% Other

## Part 4. COVID-19 Profile

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

17. **How many** of your employees will be able to work remotely once public health concerns no longer require them to do so? (n=83)

6.0% It will be the employee's decision

6.0% All or most (75% to 100%)

2.4% Many (50% to 74%)

3.6% Some (25% to 49%)

25.3% Few (1% to 24%)

56.6% None (0% of the time)

0.0% Don't know/Refused

18. **How often** will your employees be able to work remotely once public health concerns no longer require them to do so? (n=83)

7.2% It will be the employee's decision

4.8% Always or almost always (75% to 100% of the time)

1.2% Frequently (50% to 74% of the time)

7.2% Sometimes (25% to 49% of the time)

25.3% Rarely (1% to 24% of the time)

54.2% Never (0% of the time)

0.0% Don't know/Refused

19. Has your company moved to a new office since the pandemic began, or is your company looking to move to a new office? (n=82)

90.2% No, we have not moved offices

2.4% Yes, we are looking to move to a new office

2.4% Yes, we have recently moved to a new office

1.2% We will no longer have an office because all workers will be entirely remote

3.7% Don't know/Refused

[IF Q19 = “Yes, we are looking to move to a new office” OR “Yes, we have recently moved to a new office”, ASK Q20]

20. Is the new office smaller, the same size, or larger than your company’s office before the pandemic began? (n=4)

- 50.0% The new office is/will be smaller than the one before it
- 0.0% The new office is/will be the same size as the one before it
- 50.0% The new office is/will be larger than the one before it
- 0.0% Don't know/Refused

21. Please tell me how helpful each of the following strategies would be for your company as it looks to attract and retain talent: (n=81)

**RANDOMIZE**

|                                                                                                  | <u>Very Helpful</u> | <u>Somewhat Helpful</u> | <u>Not at all Helpful</u> | <u>Don't know/Refused</u> |
|--------------------------------------------------------------------------------------------------|---------------------|-------------------------|---------------------------|---------------------------|
| A. More marketing and outreach to potential job candidates (i.e. career fairs, job boards, etc.) | 24.7%               | 42.0%                   | 19.8%                     | 13.6%                     |
| B. Assistance developing resources that highlight career pathways at your company                | 14.8%               | 34.6%                   | 30.9%                     | 19.8%                     |
| C. Development of pre-apprenticeship or apprenticeship type programs                             | 19.8%               | 37.0%                   | 28.4%                     | 14.8%                     |
| D. Cost-sharing of pre-apprenticeship or apprenticeship type programs                            | 17.3%               | 24.7%                   | 38.3%                     | 19.8%                     |
| E. Supporting initiatives that draw people into the labor market                                 | 35.8%               | 30.9%                   | 16.0%                     | 17.3%                     |

22. Are there any other ways in which the County could help your company attract and retain talent? (n=80)

- 51.3% No
- 17.5% Increase affordable housing
- 8.8% Reduce taxes/ Limit government involvement



- 7.5% Capital and training**
- 2.5% Increase public transportation**
- 8.8% Other**
- 3.8% Don't know/ Refused**

## Part 5. Closing & Demographics

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D. Which of the following race(s) do you identify with most? **[MULTIPLE CHOICE - SELECT ALL THAT APPLY]** – *Multiple response permitted; percentages may sum to more than 100. (n=79)*

- 70.9% White**
- 12.7% Asian**
- 6.3% American Indian or Alaskan Native**
- 5.1% Black or African American**
- 3.8% Native Hawaiian or other Pacific Islander**
- 7.6% Other**
- 15.2% Don't know/ Refused**

E. Do you identify as Hispanic or Latino/a/x? (n=79)

**19.0% Yes**

**70.9% No**

**10.1% Don't know/Refused**

F. Do you consider yourself a member of a minority community in Monterey County? (n=79)

**31.6% Yes**

**51.9% No**

**16.5% Don't know/Refused**

G. What is your gender? (n=79)

**48.1% Man**

**43.0% Woman**

**0.0% Other**

**8.9% Don't know/Refused**

H. Please select your highest level of education. (n=79)

**0.0% Less than high school**

**5.1% High school diploma or GED**

**5.1% Vocational technical training or certification**

**11.4% Some college (no degree)**

**6.3% Associate's degree**

**32.9% Bachelor's degree**

**35.4% Master's degree or higher**

I. Would you be willing to participate in follow-up research, focused on better understanding the needs of Monterey County's business community? (n=79)

**35.4% Yes**

**49.4% No**

**15.2% Don't know/Refused**

J. Lastly, do we have your permission to provide your contact information to the County of Monterey, so that they may follow up on any issues or requests brought up during this survey? (n=79)

**44.3% Yes**

**49.4% No**

**6.3% Don't know/Refused**

**Those are all of the questions I have for you.**

**Thank you very much for participating!**

K. Company Name \_\_\_\_\_

L. Company location \_\_\_\_\_

M. Date and time of Interview \_\_\_\_\_

N. Name of Interviewer \_\_\_\_\_

O. Industry cluster \_\_\_\_\_

P. Gender (VOICE) \_\_\_\_\_