SOUTH COAST HOUSING & ITS IMPACTS REPORT ON EMPLOYER & EMPLOYEE SURVEYS

PREPARED FOR THE COASTAL HOUSING COALITION



APRIL 2015



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TABLE OF CONTENTS

Table of Contents	
List of Tables	. iv
List of Figures	. v
Introduction.	. 1
Motivation for Research	. 1
Methodology Overview	
Organization of Report	
Acknowledgements	
Disclaimer	
About True North	
Key Findings	
Perceptions of South Coast Business Climate	
Business Climate	
Question 2	
Beneficial Features of South Coast	
Question 3	
Question 4	
Challenges	
Question 5	
Question 6	
Attracting & Retaining Employees	
Difficulty Hiring Quality Employees?	
Question 7	
Biggest Barrier/Challenge to Hiring Quality Employees	13
Question 8	13
From Where Do You Recruit Employees?	13
Question 9	14
Reason for Not Recruiting from Outside South Coast	14
Question 10	
Biggest Challenge to Hiring Employees from Outside South Coast	
Question 11	
Housing	
Does Lack of Housing/Cost of Housing Negatively Impact Your Business?	
Question 12	
Question 13	
Specific Impacts of Housing on South Coast Businesses	
Question 14	
Relocating in Next Five Years?	
Question 15	
Is Housing a Main Reason You May Relocate Business?	
Question 16	
Housing & Commute Benefits	
	21
~	21
Current Employment	
Employment Status, Tenure & Educational Requirements of Position	
	22
Question 3	
Question 4	22

Current Housing & Commute Situation	. 25
Ownership Status	
Question 5	25
Length of Residence at Current Location	27
Question 6	
Housing Type	
Question 7	
Location of Residence & Work	
Question 8	
Question 9	
Commute Distance & Duration	
Question 10	
Question 11	
Primary Commute Mode.	
Question 12	
Adequacy of Housing	
Assessment of Current Residence.	
Question 13	
Can you Afford to Purchase a Suitable Home with <25-minute Commute?	0 ⊿1
Question 14	42
Question 15	45
Question 16	
Searching for Home to Purchase or Rent?	
Question 17	
Were You Able to Locate Suitable Housing Closer to Employer?	
Question 18	
Impacts	
Negative Impacts of Commute	
Question 19	
Have You Considered Changing Employers to Reduce Commute?	
Question 20	
Having You Considered Leaving the South Coast?	
Question 21	61
Affordable Housing Options	. 65
Single Family Home, 1800 Square Feet	65
Question 22a/22b	66
Townhome, 1450 Square Feet	70
Question 23a/23b	71
Condominium, 800 Square Feet	75
Question 24a/24b	76
Condominium, 675 Square Feet	
Question 25	
Ability to Purchase Affordable Townhome Option	
Question 26	
Question 27	
Background & Demographics	
Methodology	
Questionnaire Development	
Programming & Testing	
Sample, Recruiting & Data Collection	
Data Processing	
Rounding	
Koununig	09

Questionnaires & Toplines	90
Phase 1: Employer Survey	90
Phase 2: Employee Survey	98

LIST OF TABLES

Table 1	Impacts of Housing Cost, Availability on Business by Overall Business Climate
	Rating
Table 2	Current Employment Status
Table 3	Area of Residence by Area of Work - All Employees
Table 4	Area of Residence by Area of Work - Owners Who have Worked in South
	Coast < 10 Years
Table 5	Background Information for Employer Sample
Table 6	Demographics of Employee Sample

LIST OF FIGURES

Figure 1	Overall Business Climate Rating	. 8
Figure 2	Overall Business Climate Rating by Number of Employees at South Coast	
	Worksite, Years in South Coast Area & Notable/VIP Employers	. 8
Figure 3	Beneficial Aspects of South Coast Area	. 9
Figure 4	Aspects of South Coast Area That Benefit Business	. 9
Figure 5	Challenges With Doing Business in South Coast Area	10
Figure 6	Challenges With Doing Business in South Coast Area	11
Figure 7	Ease of Hiring & Retaining Employees	12
Figure 8	Ease of Hiring & Retaining Employees by Number of Employees at South	
2	Coast Worksite, Years in South Coast Area & Notable/VIP Employers	12
Figure 9	Barriers to Hiring, Retaining Quality Employees.	
Figure 10	Employee Recruit Area	
Figure 11	Employee Recruit Area by Number of Employees at South Coast Worksite &	
<u>J</u>	Notable/VIP Employers	14
Figure 12		
•	Barriers to Hiring Quality Employees Who Live Outside South Coast Area	
	Business Impacted by Lack & Cost of Housing.	
•	Business Impacted by Lack & Cost of Housing by Number of Employees at	
rigure i s	South Coast Worksite, Employee Recruit Area & Notable/VIP Employees	17
Figure 16	Negative Impacts on Business Due to Lack of Available Housing, Cost of Living	• •
rigure ro	in Area	17
Figure 17	Impacts of Housing Cost, Availability on Business	
	Business Relocating Outside Area Within 5 Years	
	Business Relocating Outside Area Within 5 Years by Number of Employees at	19
ligule 19	South Coast Worksite, Overall Business Climate Rating & Notable/VIP	
	Employers	20
Eiguro 20	Relocation Due to Lack & Cost of Housing.	
Figure 20	Willingness to Offer Benefit in Next 12Months	
	Current Employment Status by Age & Household Income	
		25
Figure 25	Current Employment Status by Education Requirement, Education & Commute	22
	Distance Miles	
	Education Requirement by Age & Household Income.	
	Education Requirement by Rent or Own Residence, Education & Area of Work	
•	Rent or Own Residence	
	Rent or Own by Years in South Coast Area & Age	
	Rent or Own by Commute Duration in Minutes & Can Afford \$3,900/Month	
	Rent or Own by Household Income & Can Afford & \$60K Down Payment.	
	Rent or Own by Area of Residence & Area of Work	
	Years Living in Current Residence	27
Figure 32	Years Living in Current Residence by Years in South Coast Area, Rent or Own	
	Residence & Area of Residence	
	Type of Residence.	
	Type of Residence by Years in Residence & Age	
	Type of Residence by Household Income & Can Afford \$3,900/Month	29
Figure 36	Type of Residence by Area or Residence, Rent or Own Residence & Can	
	Afford \$60K Down Payment	
	Area of Residence & City of Work	
•	Commute Distance in Miles.	
	Commute in Minutes.	32
Figure 40	Average Commute in Miles & Minutes by Overall, Type of Residence &	
	Commute Mode	32

Figure 41	Average Commute in MIles & Minutes by Employment Status, Area of Residence & Satisfied With Residence	33
Figure 42	Average Commute in Miles & Minutes by Rent or Own Residence & Household	
E		33
Figure 43 Figure 44	Mode of Transportation When Commuting	34
Figure 44		34
Figure 45	Mode of Transportation When Commuting by Household Income & Employment	-
		35
Figure 46		
E: 47	Residence	
	Agreement With Statements About Residence	36
Figure 46	Overall Satisfaction With Residence by Years in South Coast Area, Years in Residence & Rent or Own Residence	27
Figure 49		
	Overall Satisfaction With Residence by Age & Commute Duration in Minutes	
Figure 51		50
ligure 51	Residence	38
Figure 52		50
inguie se	Education	38
Figure 53	Average Housing Adequacy Score by Overall, Years in South Coast Area,	
J	Years in Residence & Rent or Own Residence	39
Figure 54	Average Housing Adequacy Score by Age & Commute Duration in Minutes	
Figure 55	Average Housing Adequacy Score by Hsld Income & Type of Residence.	40
Figure 56	Average Housing Adequacy Score by Commute Distance in Miles & Area of	
		41
	Average Housing Adequacy Score by Area of Work, Child in Hsld & Education	
	Afford to Purchase Adequate Home With 25-min Commute	42
Figure 59	Afford to Purchase Adequate Home With 25-min Commute by Overall, Years	
		42
Figure 60	Afford to Purchase Adequate Home With 25-min Commute by Age &	
		43
Figure 61	Afford to Purchase Adequate Home With 25-min Commute by Hsld Income &	42
E :		43
Figure 62	Afford to Purchase Adequate Home With 25-min Commute by Commute Distance in Miles & Area of Residence	44
Eiguro 63	Afford to Purchase Adequate Home With 25-min Commute by Area of Work,	44
Figure 05	Child in Hsld & Education	11
Figure 64	Afford to Rent Adequate Home With 25-min Commute	
	Afford to Rent Adequate Home With 25 min Commute by Overall, Years in	75
rigure of		45
Figure 66	Afford to Rent Adequate Home With 25-min Commute by Age & Commute	
		46
Figure 67	Afford to Rent Adequate Home With 25-min Commute by Hsld Income & Type	
5		46
Figure 68	Afford to Rent Adequate Home With 25-min Commute by Commute Distance	
-	in Miles & Area of Residence	46
Figure 69	Afford to Rent Adequate Home With 25-min Commute by Area of Work, Child	
		47
	5	47
Figure 71		
		48
Figure 72	Searched for Housing Closer to Work by Age & Type of Residence	48

Figure	73	Searched for Housing Closer to Work by Marital Status, Commute Duration in Mins & Rent or Own Residence	49
Figure	74	Searched for Housing Closer to Work by Employment Status & Area of	
Figure	75	Residence	49 50
Figure			
Figure		Searched For Home to Purchase or Rent Closer to Work a Clinia in Fisher Control of Searched For Home to Purchase or Rent Closer to Work	
Figure		Searched For Home to Purchase or Rent Closer to Work by Years in South	
Figure	79	Coast Area & Years in Residence Searched For Home to Purchase or Rent Closer to Work by Age & Type of	51
		Residence	52
Figure	80	Searched For Home to Purchase or Rent Closer to Work by Marital Status, Commute Duration in Mins & Rent or Own Residence	52
Figure	81	Searched For Home to Purchase or Rent Closer to Work by Employment Status	
		& Area of Residence	53
Figure	82	Searched For Home to Purchase or Rent Closer to Work by Hsld Income	53
Figure	83	Searched For Home to Purchase or Rent Closer to Work by Area of Work & Child in Hsld	54
Figure	84	Able to Find Suitable, Affordable Home	
Figure		Impacts of 25+ Min Commute	
		Average Commute Impact Score by Overall, Rent or Own Residence & Age	
Figure		Average Commute Impact Score by Commute Duration in Mins & Hsld	
2		Income	56
Figure	88	Average Commute Impact Score by Type of Residence & Marital Status	57
Figure	89	Average Commute Impact Score by Spouse/Sig Other Work & People in Hsld	57
Figure	90	Average Commute Impact Score by Area of Residence, Child in Hsld & Satisfied With Residence	58
Figure	91	Considered Changing Employers	
Figure			
Figure		Considered Changing Employers by Commute Duration in Mins & Hsld	59
Figuro	04	Income	29
rigule	94	Considered Changing Employers by Area of Residence, Child in Hsld & Rent or Own Residence	60
Figuro	05		60
rigure	95	Considered Changing Employers by Commute Reduces Overall Quality of Life, Education Requirement & Satisfied With Res	60
Figuro	06	Considered Leaving South Coast Area	
Figure		-	
•		Home and Commute Status With Considered Leaving South Coast Area	01
rigure	90	Years in South Coast Area, Years in Residence & Rent or Own Residence	62
Figure	٥٥	Home and Commute Status With Considered Leaving South Coast Area by	02
riguic	55	- · · · ·	62
Figure	100	Home and Commute Status With Considered Leaving South Coast Area by	02
rigare	100		63
Figure	101	Home and Commute Status With Considered Leaving South Coast Area by	05
		Commute Distance in Miles & Area of Residence	63
Figure	102	Home and Commute Status With Considered Leaving South Coast Area by	
			64
Figure	103	Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft	
		Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by	
<u> </u>			66
Figure	105	Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by	-
5 -	-		67
Figure	106	Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by	
-		Commute Duration in Mins & Satisfied With Res	67

Figure 107 Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by	60
Hsld Income & Home and Commute Status	68
Type of Residence & Area of Work	68
Figure 109 Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by Marital Status & Area of Residence	69
Figure 110 Interest in Renting or Purchasing Single Family Home, 3-4 Br, 1,800 Sqft by People in Hsld, Adults in Hsld & Child in Hsld	60
Figure 111 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft	
Figure 112 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Years in	
South Coast Area & Years in Residence	71
Figure 113 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Rent or Own Residence & Age	72
Figure 114 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Commute	12
Duration in Mins & Satisfied With Res	72
Figure 115 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Hsld	
Income & Home and Commute Status	73
Figure 116 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Type of	
Residence & Area of Work	73
Figure 117 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by Marital Status & Area of Residence	74
Figure 118 Interest in Renting or Purchasing Townhome, 2-3 Br, 1,450 Sqft by People in	74
Hsld, Adults in Hsld & Child in Hsld	74
Figure 119 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft	
Figure 120 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Years in South	
Coast Area & Years in Residence	76
Figure 121 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Rent or Own	
Residence & Age	77
Figure 122 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Commute Duration in Mins & Satisfied With Res	77
Figure 123 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Hsld Income &	//
Home and Commute Status.	78
Figure 124 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Type of Residence	
& Area of Work	78
Figure 125 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by Marital Status &	
Area of Residence	79
Figure 126 Interest in Renting or Purchasing Condo, 2 Br, 905 Sqft by People in Hsld,	70
Adults in Hsld & Child in Hsld	
Figure 128 Interest in Renting Condo, 1 Br, 675 Sqft by Years in South Coast Area &	80
Years in Residence	81
Figure 129 Interest in Renting Condo, 1 Br, 675 Sqft by Rent or Own Residence & Age	
Figure 130 Interest in Renting Condo, 1 Br, 675 Sqft by Commute Duration in Mins & Satisfied With Res	
Figure 131 Interest in Renting Condo, 1 Br, 675 Sqft by Hsld Income & Home and	01
Commute Status	82
Figure 132 Interest in Renting Condo, 1 Br, 675 Sqft by Type of Residence & Area of	-
Work	82
Figure 133 Interest in Renting Condo, 1 Br, 675 Sqft by Marital Status & Area of	_
Residence	82
Figure 134 Interest in Renting Condo, 1 Br, 675 Sqft by People in Hsld, Adults in Hsld & Child in Hsld	QO
Child in Hsld Figure 135 Able to Afford \$3,900 per Month & \$60K Down Payment	
	05



Figure 136 Able to Afford \$3,900 per Month & \$60K Down Payment by Rent or Own	
Residence, Age & Satisfied With Res	84
Figure 137 Able to Afford \$3,900 per Month & \$60K Down Payment by Type of Residence	
& Commute Duration in Mins	84
Figure 138 Able to Afford \$3,900 per Month & \$60K Down Payment by Home and	
Commute Status & Hsld Income	85
Figure 139 Able to Afford \$3,900 per Month & \$60K Down Payment by Area of Residence	
& Area of Work	85



I N T R O D U C T I O N

The Coastal Housing Coalition (Coalition) is a non-profit organization dedicated to educating the public and policymakers about the lack of available housing within financial reach of our local workforce and the impact this has on the South Coast community. The Coalition also advocates for polices and projects that result in the production of more affordable housing for local workers and their families. To fulfill its mission, the Coalition periodically conducts primary and secondary research on the state of housing along the South Coast, affordability and inventory trends, demographics, public opinion, as well as patterns in employment, commuting, and other topics. In addition to profiling the nature and extent of the jobs/housing imbalance and its many impacts on the quality of life in the region, the research can also help the Coalition identify effective and affordable housing solutions that will be attractive to local workers and their families.

MOTIVATION FOR RESEARCH The purpose of the research presented in this report was to gather statistically reliable information on the state of the jobs/housing imbalance in the South Coast region, profile its impacts on various aspects of our job market, community and quality of life, as well as identify marketable housing solutions. To what extent are local workers being forced to rent or purchase housing outside of the South Coast due to lack of affordable housing? Do these workers tend to cluster in certain demographic, socio-economic, and employment subgroups? Looking to the near future, what percentage of workers who currently reside locally have considered leaving Santa Barbara to acquire an affordable home and/or change their employment? Do local employers struggle to find and retain talented workers due to the lack of affordable housing options in Santa Barbara? What types of affordable housing solutions are most marketable to employees in the South Coast? Answers to these and related questions will help the Coastal Housing Coalition and local policymakers better understand the nature of the jobs/housing imbalance and develop effective, marketable strategies to mitigate the problem in the future.

METHODOLOGY OVERVIEW A full description of the methodology used for this study is included later in this report (see *Methodology* on page 88). To adequately address the Coalition's research interests, a two-part study was conducted that first involved surveying employers on the South Coast from a diverse array of industries, then surveying employees of these same companies. In Phase 1, 126 South Coast employers were recruited to participate in a secure, password-protected online survey that profiled the extent to which local housing issues have affected their business operations—including their ability to hire and retain talented workers, wage escalation, and their competitiveness within their respective industries. Having measured employers' perspectives, Phase 2 involved surveying 2,912 employees from these same South Coast companies regarding their current housing situation, commute patterns, the types of trade-offs they perceive they are currently making with respect to their job/housing situation, and related issues. In addition to profiling the nature of the *problem*, the Phase 2 online survey also explored employees' interest in several affordable housing *solutions* that are feasible on the South Coast. All survey data for the study was collected between May 2014 and November 2014.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It pro-

vides a summary of the most important factual findings of the survey and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-byquestion discussion of the results from the surveys by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaires used for the interview are contained at the back of this report (see *Questionnaires & Toplines* on page 90) and a complete set of crosstabulations for the Employer Survey and Employee Survey can be found in Appendices A and B, respectively.

ACKNOWLEDGEMENTS True North Research thanks Lisa Plowman, John Campanella, Julia Ullemeyer and others at the Coastal Housing Coalition who participated in the design and implementation of this study. Their expertise, local knowledge, and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors at True North Research, Inc. (Dr. Timothy McLarney and Richard Sarles) and not necessarily those of the Coastal Housing Coalition. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North Research is a full-service survey research firm that is dedicated to providing public, private and not-for-profit organizations with a clear understanding of the opinions, perceptions, priorities and concerns of their constituents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, and developing effective public information campaigns. During their careers, the principals at True North (Dr. McLarney and Mr. Sarles) have designed and conducted over 800 survey research studies, including dozens that have focused on employment, housing, commuting, congestion, emissions, and the quality of life impacts associated with an imbalance between jobs and housing.

KEY FINDINGS

As noted in the *Introduction*, this study was designed to provide the Coastal Housing Coalition with statistically reliable information on the state of the jobs/housing imbalance in the South Coast region, profile its impacts on various aspects of the local job market, community and quality of life, as well as identify marketable housing solutions. Whereas subsequent sections of this report are devoted to conveying the detailed results of the surveys, in this section we attempt to 'see the forest through the trees' and note how the collective results of the surveys answer some of the key questions that motivated the research.

To what extent are South Coast employees priced-out of the local housing market? According to a recent nationwide study of housing markets in 1,586 counties, Santa Barbara County ranks among the least affordable markets nationwide. When one considers the average monthly mortgage payment relative to the median household income, Santa Barbara County ranks in the top 35 *least* affordable housing markets in the nation. The situation is even more bleak when viewed from a renter's perspective, as the ratio of average fair-market rent to median household income places Santa Barbara County in the top 25 least affordable housing markets nationwide.¹

The patterns noted above at the countywide level are especially pronounced in the South Coast communities of Santa Barbara, Goleta and Carpinteria. Not only are housing costs and rental rates 100% to 200% higher in these communities when compared to outlying areas in Santa Barbara County or neighboring Ventura County, the South Coast is also comparatively job-rich.² This spatial mismatch between jobs and affordable housing is known as a jobs/housing imbalance, and it has a variety of negative impacts at the individual, local, and regional levels (for more on the impacts, see below).

Although secondary data sources on the distribution of housing, housing costs, and jobs paint a picture of the jobs/housing imbalance in broad brush, one of the goals of the study presented in this report was to provide a more detailed picture of the jobs/housing imbalance from the perspective of South County employers and employees. The first and most fundamental question: To what extent are South Coast employees effectively priced-out of the current South Coast housing market?

Based on personal interviews with over 2,900 South Coast employees, just 30% of South Coast employees currently own a suitable home that is less than a 25-minute commute (one-way) to their place of employment *or* can afford to do so—meaning that 70% of South Coast employees can't afford to purchase a home that fits this criteria. One-third of South Coast employees also indicated that they were effectively priced-out of

^{1.} Study conducted by RealtyTrac, Daren Blomquist, posted April 23, 2014.

^{2.} Source: Santa Barbara County State of the Commute, report prepared by SBCAG, November 2014.

the South Coast rental market being unable to afford a suitable rental property within a 25-minute commute of their current employer.

The perception of many South Coast employees' that they can't afford suitable housing within a 25-minute commute of their employer is one grounded in first-hand experiences. More than half (56%) of South Coast employees who currently commute at least 25 minutes to work (one-way) indicated that they had searched for housing closer to their work location. Just 2% indicated that their search was a success.

Which employee subgroups are most impacted by the high cost of housing? The ability to purchase a suitable home within a 25-minute one-way commute of their place of employment was widely perceived by South Coast employees to be an impossibility in the current housing market (see above), although it was especially pronounced in certain segments. At the risk of oversimplifying, the South Coast housing narrative is a tale of two workforces: those that entered the South Coast job market *prior* to the housing boom 15 years ago, and those that entered after.

> Older employees who were fortunate to enter the South Coast job market at least 15 years ago were able to become established in the South Coast prior to the housing boom. As a result, they are far more likely to own their home (60%), live in the most desirable single-family type of housing (65%), and report that their current housing meets their needs in a variety of aspects including being located in a good school district (63%) and being sufficiently sized (75%). They are also more likely to state that the amount they pay for housing is reasonable (58%) and that they are satisfied with their current housing (79%).

> The tale of employees who began working in the South Coast *after* the start of the housing boom is a much different story. Not only is their rate of home ownership substantially lower (30%) and their tendency to live in multi-family housing higher (54%), they also express less positive views of their current housing situation in terms of location, size and overall satisfaction. Combining home ownership and location, just 20% of employees who began working in the South Coast since the year 2000 own a home within a 25-minute of their place of employment or can afford to do so. The comparable figure for those who have worked on the South Coast for 15 years or longer is more than double at 45%.

From a demographic perspective, employees who entered the South Coast job market less than 15 years ago and who have been most negatively impacted by the escalation of housing prices during this time are better educated (94% are college graduates) and much younger (70% under 45 years of age) than their counterparts. They make up just over half (58%) of the South Coast's current workforce, although this percentage is steadily increasing as older employees who arrived prior to the housing boom retire. The implication is that local employers, the tax base for public services, and the entire South Coast economy will become increasingly dependent on talent and skills of employees who entered the job market post 2000. Yet, just one-in-five can afford to own a home in the South Coast.

How does the housing market impact South Coast employees?

The lack of affordable housing in the South Coast impacts employees in a variety of ways. Most who choose to live in the South Coast are forced to pay housing costs they perceive to be unreasonable, few can afford to purchase and thus rates of home ownership are much lower, and they are generally less satisfied with the condition and quality of housing in which they reside.

One the other hand, those who respond to the high cost of housing by moving to outlying areas and commuting to their South Coast place of employment face a different set of challenges. Although they are generally much more positive about their *housing* situation, most confess that their commute significantly reduces the time they would otherwise spend with family (72%), reduces their involvement with their local community (64%), causes them stress (53%), and reduces their overall quality of life (54%). Employees who commute at least 25 minutes one-way to work also reported negative impacts of the commute on their job performance, including reduced productivity (32%) and a substantial reduction in the time they have to collaborate and network with other employees (59%).

For some employees, the pressures created by the South Coast housing market are unsustainable. Forty percent (40%) of South Coast employees who commute at least 25 minutes to work (one-way) reported that they have considered changing employers so they can work closer to their current residence. Even more striking, approximately 44% of *all* South Coast employees indicated that they've considered leaving the South Coast entirely to live and work in a region where housing is more affordable. As the reader might expect, the percentage of those considering leaving the South Coast to live and work in a more affordable region was even higher (54%) among those expected to be the future of the South Coast's workforce (employees under 45 and those who have worked in the South Coast less than 15 years).

How does the housing market impact local employers? The South Coast housing market is not just a challenge for employees it affects local businesses as well. Whether in response to unprompted open-ended questions or structured questions, the vast majority of South Coast employers reported that the lack of affordable housing in the South Coast negatively impacts their businesses in a variety of ways. In fact, when asked to name the biggest challenge to doing business in the South Coast, the high cost of the South Coast real estate market was the most frequent response (37%), followed by cost of living in general (34%), and workforce availability (29%).

From the employer's perspective, the most obvious impact of the South Coast housing market is its negative influence on their ability to hire and retain quality employees. More than two-thirds of South Coast employers indicated they have substantial difficulty retaining employees who want to rent or purchase a quality home, and more than half find it difficult to attract employees from outside the South Coast area to work for their organization due to the high cost of housing.

South Coast employers also frequently cited other negative impacts of the housing market on their businesses, including wage escalation (57%), reduced profitability (42%), reduced employee morale (52%), and negative impacts on productivity (45%) and employee collaboration/networking opportunities (42%) caused by employees needing to commute and being stuck in traffic.

More than one-third of South Coast employers have responded to the challenges the housing market poses to their recruiting efforts by limiting their recruiting efforts to those who already live in the South Coast, dramatically shrinking the talent pool from which they can draw. A small but significant percentage (8%) also expect that there is a reasonable chance they will relocate their business away from the South Coast in the next five years as a direct result of the high cost of housing and the difficulties it creates for their business.

Is there a market for affordable, workforce housing solutions? In addition to profiling the housing problem in the South Coast and the extent that its impacts are felt by South Coast businesses and employees alike, this study also explored potential solutions that would help mitigate the jobs/housing imbalance in the region. In the Employee Survey, this took the form of presenting respondents with several workforce housing options that could be built in the South Coast, gauging their interest in renting and/or purchasing each option, as well as determining their ability to afford the solutions. It is important to emphasize that these were workforce housing solutions (not low-income housing), designed to be affordable to those who make above-average incomes yet are nevertheless priced-out of the existing South Coast housing market.

> The housing solutions tested did not appeal to all South Coast employees. Some employees were already satisfied with their current housing situation, especially those fortunate to have moved to the South Coast prior to the dramatic escalation in housing values that began in the early 2000s. Others were unable to afford the types of workforce housing solutions tested, even if they were designed to be more affordable than the current housing stock on the South Coast.

> Nevertheless, this study reveals that there is a significant and sizeable market among current South Coast employees for affordable, workforce housing solutions. Indeed, more than half (52%) of South Coast employ-

ees expressed interest in living in at least one of the affordable townhome or condominium housing solutions tested,³ with 11% being *very* interested in one or more of the housing options.⁴ Moreover, 5% were both interested *and* could afford a \$60,000 down payment and a combined mortgage/property tax payment of \$3,900 monthly, which would suffice for three of the four affordable housing options tested.

^{3.} This figure does not include the \$800,000 single family residence option.

^{4.} The percentage of South Coast employees who expressed interest in renting and/or purchasing any single option ranged from 13% to 25% depending on the size, type and cost of the housing tested (see Affordable Housing Options on page 65).

PERCEPTIONS OF SOUTH COAST BUSINESS CLIMATE

The opening series of questions in the Employer Survey were designed to measure local employers' perceptions of the business climate in South Coast area, identify aspects of the South Coast that are beneficial to local businesses, as well as profile perceived challenges to operating a business in the South Coast.

BUSINESS CLIMATE Respondents in the Employer Survey were first asked to rate the business climate in the South Coast area using a five point scale of excellent, good, fair, poor, or very poor.

Question 2 Overall, how would you rate the business climate in the South Coast area?

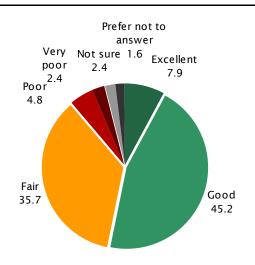


FIGURE 1 OVERALL BUSINESS CLIMATE RATING

As shown in Figure 1, local employers were mixed in their assessments of the South Coast business climate, with 8% reporting that it is excellent, 45% stating it is good, and 36% offering that it is fair. Approximately 7% of employers indicated that the business climate in the South Coast area is either poor or very poor, whereas 4% were unsure or unwilling to answer the question. Figure 2 shows how opinions regarding the South Coast business climate varied by number of employees, years of operating in South Coast area, and whether the company was identified by the Coalition as a notable or VIP employer.

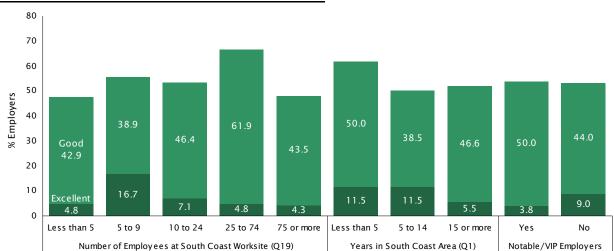
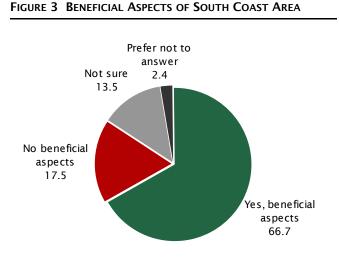


FIGURE 2 OVERALL BUSINESS CLIMATE RATING BY NUMBER OF EMPLOYEES AT SOUTH COAST WORKSITE, YEARS IN SOUTH COAST AREA & NOTABLE/VIP EMPLOYERS

BENEFICIAL FEATURES OF SOUTH COAST All employers were next asked whether there is a particular aspect or feature of the South Coast that is beneficial to their business. Two-thirds (67%) of respondents indicated that there are indeed aspects of the South Coast that benefit their business, whereas 18% did not perceive a particular benefit to being located in the South Coast and 16% were unsure or preferred to not answer the question (Figure 3).

Question 3 Is there a particular aspect or feature of the South Coast that is beneficial to your business?



Among the 67% of businesses that indicated there was an aspect or feature of the South Coast that benefits their business, the survey next asked that they describe the aspect or feature that *most* benefits their business. Question 4 was administered in an openended manner, allowing respondents to mention any particular aspect or feature of the South Coast that came to mind without being prompted by, or restricted to, a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 4.

Question 4 Please briefly describe the aspects or features of the South Coast that most benefit your business

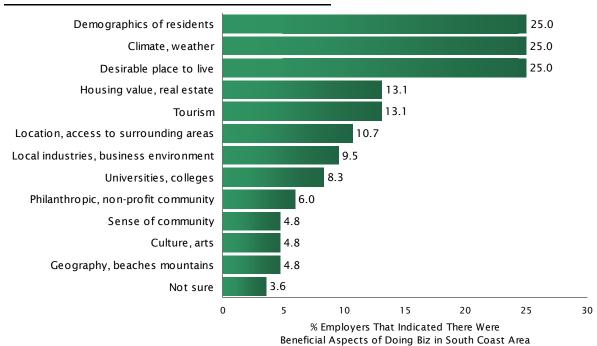
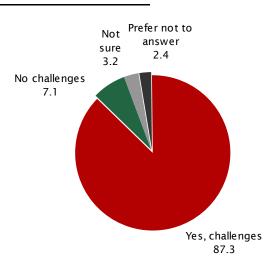


FIGURE 4 ASPECTS OF SOUTH COAST AREA THAT BENEFIT BUSINESS

Local employers were most apt to cite the demographics of local residents (25%), climate/ weather (25%), and it being a desirable place to live (25%) as the aspect of the South Coast that most benefits their business, followed by housing values/value of real estate (13%), tourism (13%), and location relative to surrounding areas (11%).

CHALLENGES In a manner similar to that described above for benefits of being located in the South Coast, Question 5 transitioned to asking respondents about any particular challenges associated with doing business in the South Coast area. Overall, nearly nine-in-ten employers (87%) indicated that there are specific challenges associated with doing business in the South Coast, whereas 7% did not perceive any challenges, and another 6% were unsure or unwilling to answer the question (Figure 5).

Question 5 Are there any particular challenges associated with doing business in the South Coast area?





When employers that noted particular challenges associated with doing business in the South Coast area were asked to describe those challenges (see Figure 6 on the next page) in an openended manner, the most common responses were the cost and/or availability of real estate (37%), cost of living in general (34%), availability of workforce/workforce limited by cost of living (29%), and government fees/taxes/regulations (22%).

Question 6 Please briefly describe the particular challenges associated with doing business in the South Coast.

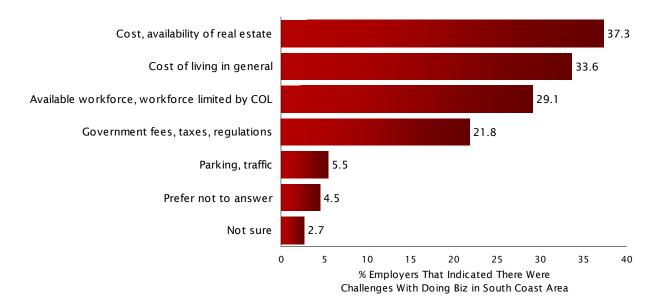


FIGURE 6 CHALLENGES WITH DOING BUSINESS IN SOUTH COAST AREA

ATTRACTING & RETAINING EMPLOYEES

Having measured their perceptions of the South Coast business climate in general, the survey transitioned to the topic of attracting and retaining quality employees to work in the South Coast area.

DIFFICULTY HIRING QUALITY EMPLOYEES? The initial question in this series simply asked respondents to rate how easy or difficult it is to hire and retain quality employees to work at their business in the South Coast area. As shown in Figure 7, the majority of employers indicated that it is either very (14%) or somewhat difficult (48%) attracting and retaining quality employees to work at their South Coast business. Less than one-third of respondents indicated it is somewhat (25%) or very easy (4%) to attract and retain quality employees, whereas 9% indicated the question did not apply to their business and 1% preferred to not answer the question.

Question 7 In general, how easy or difficult is it to hire and retain quality employees to work at your business in the South Coast area?

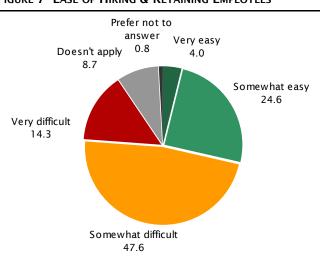


FIGURE 7 EASE OF HIRING & RETAINING EMPLOYEES

For the interested reader, Figure 8 shows how employers' experiences attracting and retaining quality employees to work at their South Coast businesses varied by the number of employees working at their South Coast site, years of operating on the South Coast, and whether the company was identified by the Coalition as a notable or VIP employer based on their being members of the Coastal Housing Partnership (CHC's affiliated organization) and/or a business that was large in size/number of employees.

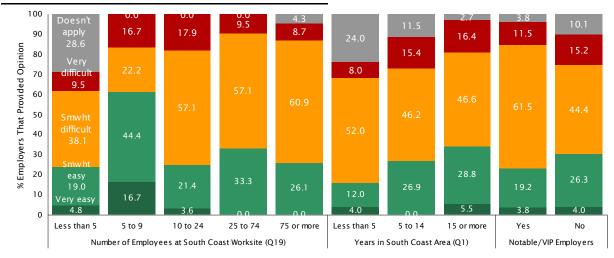


FIGURE 8 EASE OF HIRING & RETAINING EMPLOYEES BY NUMBER OF EMPLOYEES AT SOUTH COAST WORKSITE, YEARS IN SOUTH COAST AREA & NOTABLE/VIP EMPLOYERS

BIGGEST BARRIER/CHALLENGE TO HIRING QUALITY EMPLOYEES Employers

were next asked to identify the biggest barriers or challenges to hiring and retaining quality employees to work at their South Coast business. Question 8 was presented in an open-ended manner, thereby allowing employers to cite any barriers or challenges that came to mind without being prompted by—or constrained to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 9 below.

Overall, the availability/cost of housing was the most frequently cited barrier to hiring and retaining quality employees (34%), followed by a reference to the cost of living in general (33%). Other challenges included the ability to offer competitive salaries and benefits (21%), a lack of qualified workers (19%), and commuting/transportation challenges (9%).

Question 8 What would you say are the biggest barriers or challenges to hiring and retaining quality employees to work at your business?

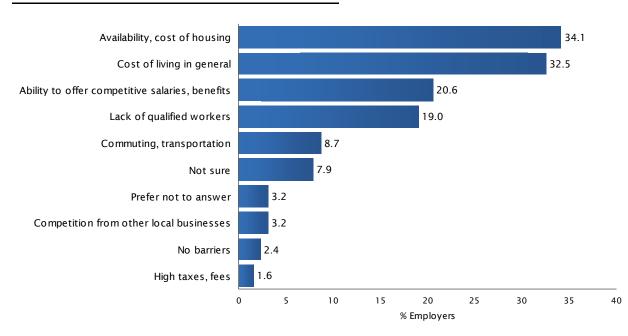
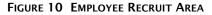
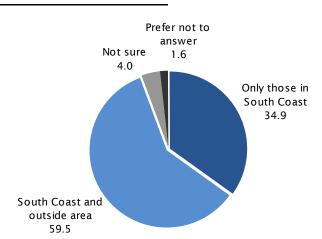


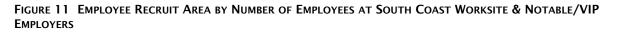
FIGURE 9 BARRIERS TO HIRING, RETAINING QUALITY EMPLOYEES

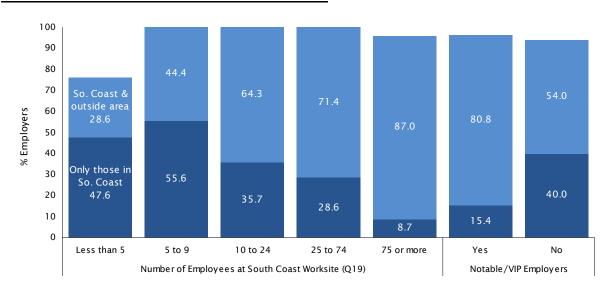
FROM WHERE DO YOU RECRUIT EMPLOYEES? All employers were next asked if they only recruit employees who already live in the South Coast area, or if they also recruit from outside the area. More than one-third (35%) of employers surveyed stated that they only recruit locally from South Coast residents, whereas 60% indicated they recruit from a broader geographic area and 6% were unsure or preferred to not answer the question (Figure 10). When compared to their respective counterparts, companies with less than 10 employees and those not flagged by the Coalition as a notable/VIP employer were substantially more likely to report recruiting only from the South Coast area (see Figure 11).

Question 9 Does your business only recruit employees who already live in the South Coast area, or do you also recruit employees from outside of the area?









REASON FOR NOT RECRUITING FROM OUTSIDE SOUTH COAST The 35% of companies that indicated they only recruit employees who already live in the South Coast were subsequently asked to describe the reason their business does not recruit from outside the South Coast area. Question 10 was posed in an open-ended manner, which allowed respondents to provide any reason(s) that came to mind without being prompted or constrained by a list of options. As shown in Figure 12 on the next page, the two dominant reasons for only recruiting employees who already live in the South Coast were a perception that the local workforce is sufficient/no need to look outside the South Coast (36%) and that employee relocation is too expensive (34%).

Question 10 Is there a particular reason your business does not recruit employees from outside of the South Coast area?

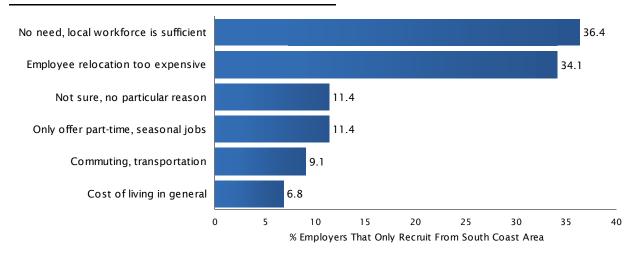


FIGURE 12 REASONS FOR NOT RECRUITING EMPLOYEES FROM OUTSIDE SOUTH COAST AREA

BIGGEST CHALLENGE TO HIRING EMPLOYEES FROM OUTSIDE SOUTH

COAST As noted above, approximately 60% of South Coast employers indicated they recruit employees from outside the South Coast. Among these employers, Question 11 asked in an open-ended manner that they describe the biggest barriers or challenges to hiring quality employees who live outside the South Coast to come work for their business. Overall, the availability/cost of housing was the most frequently mentioned barrier to hiring quality employees who do not already live in the South Coast (38%), followed by the cost of living in general (34%), and commuting/transportation issues (25%).

Question 11 What are the biggest barriers or challenges to hiring quality employees who live outside of the South Coast to come work for your business?

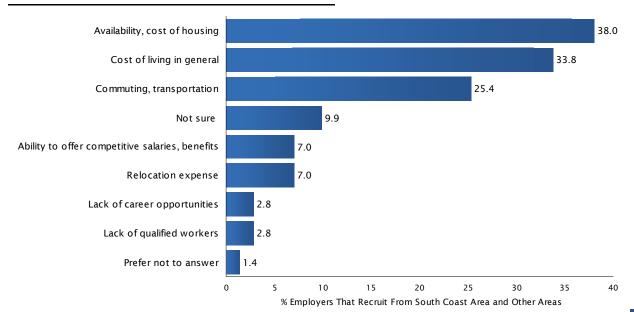


FIGURE 13 BARRIERS TO HIRING QUALITY EMPLOYEES WHO LIVE OUTSIDE SOUTH COAST AREA

ΗΟυSING

As discussed in the prior sections, the Employer Survey opened with questions about the challenges businesses face in the South Coast—both in general, as well as in hiring and retaining quality employees. These questions were purposely structured to allow employers the opportunity to mention any issues that came to mind *without prompting*. The questions did not mention housing (specifically) in order to determine the extent to which housing issues are *naturally* on the minds of South Coast employers. Having gauged the saliency of housing issues in general, the final substantive section of the Employer Survey focused on the perceived impacts of housing availability and/or cost of housing on local South Coast businesses.

DOES LACK OF HOUSING/COST OF HOUSING NEGATIVELY IMPACT YOUR

BUSINESS? When asked if a lack of available housing and/or the cost of housing in the South Coast negatively impacts their business in any way, 82% of local employers answered in the affirmative (Figure 14). Just 8% of South Coast businesses indicated that they aren't negatively impacted by a lack of available housing/cost of housing, whereas 10% were unsure or unwilling to share their opinion. Although more than two-thirds of employers in *all* categories indicated that their business is negatively impacted by a lack of available housing and/or the cost of housing in the South Coast area, large employers (75 or more employees) and those that recruit employees from outside the South Coast area were especially likely to feel impacted by housing issues (see Figure 15 on the next page).

Question 12 Next are several questions about housing in the South Coast area and how it may affect your business. Does a lack of available housing and/or the cost of housing in the South Coast area negatively impact your business in any way?

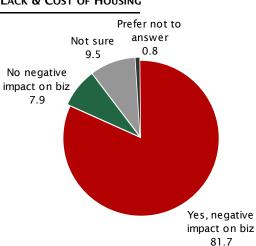
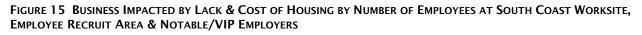
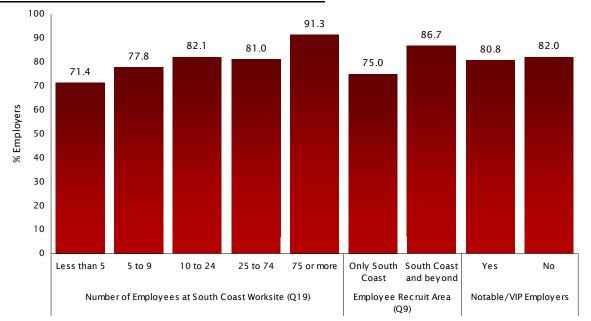


FIGURE 14 BUSINESS IMPACTED BY LACK & COST OF HOUSING

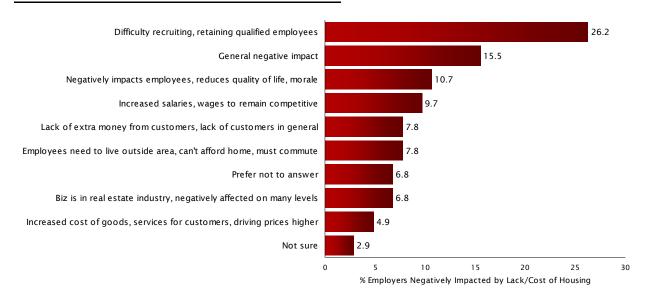
When employers that indicated their business is negatively impacted by a lack of housing and/or cost of housing were subsequently asked in an open-ended manner to describe the ways in which their business is negatively impacted, 26% cited difficulty hiring/retaining quality employees, 16% cited a negative impact in general, 11% indicated that a lack of housing/high cost of housing reduces employee morale and quality of life, and an additional 10% stated that the South Coast housing market forces their business to offer higher salaries and benefits to be competitive (see Figure 16).





Question 13 In what ways is your business negatively affected by a lack of available housing and/or the cost of housing in the South Coast?





SPECIFIC IMPACTS OF HOUSING ON SOUTH COAST BUSINESSES Whereas Question 13 provided employers with an open-ended opportunity to describe in their own words the ways in which the South Coast housing market negatively impacts their business, Question 14 provided the specific list of potential impacts shown in Figure 17 on the next page and simply asked respondents to indicate the extent to which a lack of available housing and/or the cost of housing impacts their business in each way.

Question 14 Please indicate whether a lack of available housing and/or the cost of housing in the South Coast area affects your business in the following ways.

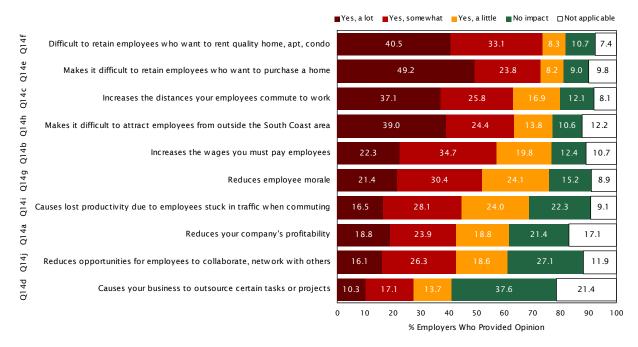


FIGURE 17 IMPACTS OF HOUSING COST, AVAILABILITY ON BUSINESS

More than half of South Coast employers indicated that their business is *at least* somewhat impacted by a lack of housing and/or the cost of housing in the South Coast in the following ways: Makes it difficult to retain employees who want to rent a quality home, apartment or condo (74%) or purchase a home (73%), Increases the distance their employees must commute to work (63%), Makes it difficult to attract employees from outside the South Coast area (63%), Increases the wages they must pay employees (57%), and Reduces employee morale (52%).

More than one-third of South Coast employers also stated that their business is at least somewhat affected by a lack of housing and/or the cost of housing in the South Coast because it causes lost productivity due to employees being stuck in traffic on their commute to work (45%), reduces their company's profitability (43%), and reduces opportunities for employees to collaborate and network with others since many commute from out of the area (42%). More than one-infour South Coast businesses (27%) indicated that their business is at least somewhat impacted by a lack of housing and/or the cost of housing in the South Coast in that it causes them to outsource certain tasks or projects they would otherwise manage internally.

Table 1 on the next page shows how the percentage of employers who indicated their business was impacted on each dimension by a lack of housing/cost of housing varied according to their overall assessment of the South Coast business climate. On every dimension tested, businesses that rated the overall business climate in the South Coast as fair, poor or very poor were more likely than their counterparts to indicate that their business was impacted by a lack of housing/ cost of housing.

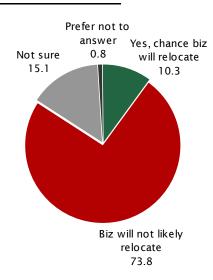
	Overall Business Climate Rating (Q2)	
	Excellent, good	Fair, poor, very poor
Difficult to retain employees who want to rent quality home, apt, condo	73.8	92.3
Makes it difficult to retain employees who want to purchase a home	78.8	84.9
Increases the distances your employees commute to work	73.1	88.5
Makes it difficult to attract employees from outside the South Coast area	74.2	80.8
Increases the wages you must pay employees	75.0	80.8
Reduces employee morale	70.0	83.7
Causes lost productivity due to employees stuck in traffic when commuting	63.1	75.5
Reduces your company's profitability	49.2	78.0
Reduces opportunities for employees to collaborate, network with others	56.3	68.0
Causes your business to outsource certain tasks or projects	34.9	52.0

TABLE 1 IMPACTS OF HOUSING COST, AVAILABILITY ON BUSINESS BY OVERALL BUSINESS CLIMATE RATING

RELOCATING IN NEXT FIVE YEARS? All employers were next asked whether—in the next five years—there is a reasonable chance that their business will move to a location outside of the South Coast. As shown in Figure 18 below, just 10% of employers anticipated that there was a reasonable chance their business would relocate out of the South Coast during the period of interest, whereas 74% did not foresee a reasonable chance of relocating and 16% were unsure or unwilling to answer the question. When compared to their respective counterparts, businesses with 25 to 74 employees and those that rated the South Coast business climate as fair, poor or very poor were the most likely to anticipate relocating outside the South Coast in five years time (see Figure 19 on the next page).

Question 15 Looking forward to the next five years, is there a reasonable chance your business will move to a location outside of the South Coast?

FIGURE 18 BUSINESS RELOCATING OUTSIDE AREA WITHIN 5 YEARS



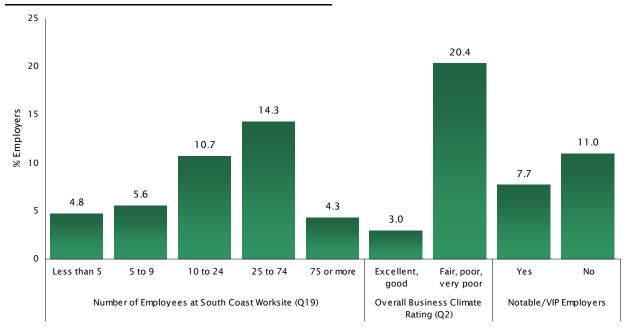


FIGURE 19 BUSINESS RELOCATING OUTSIDE AREA WITHIN 5 YEARS BY NUMBER OF EMPLOYEES AT SOUTH COAST WORKSITE, OVERALL BUSINESS CLIMATE RATING & NOTABLE/VIP EMPLOYERS

IS HOUSING A MAIN REASON YOU MAY RELOCATE BUSINESS? As noted above, 10% of South Coast businesses surveyed indicated that there is a reasonable chance their business will relocate outside of the South Coast area within the next five years. More than threequarters (77%) of these businesses indicated that the cost of housing and/or lack of available housing in the South Coast area was one of the main reasons they are considering relocating their business (Figure 20).

Question 16 Is the cost of housing and/or lack of available housing in the South Coast area one of the main reasons why your business may move out of the area?

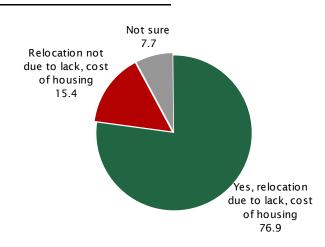


FIGURE 20 RELOCATION DUE TO LACK & COST OF HOUSING

HOUSING & COMMUTE BENEFITS The final substantive questions of the Employer Survey sought to profile the types of housing and commute-related benefits *currently* offered by South Coast businesses (Question 17), as well as the types of benefits they would be *willing* to offer in the near future (Question 18). Figure 21 combines the answers to both questions in a single graphic.

Among the benefits tested, free or discounted transit passes were the most common *currently* offered by South Coast businesses (16%). Very few South Coast businesses indicated they currently offer employer-provided housing (5%), subsidized housing loans (2%), or subsidies for rental housing (2%). Combining those businesses that currently offer a benefit with those that would probably/definitely be willing to offer the benefit in the next 12 months in the interest of offsetting the cost of employee housing, one-third (34%) of South Coast businesses were willing to offer free or discounted transit passes. Less than one-in-ten South Coast businesses indicated they'd be willing to offer employer-provided housing (7%), subsidies for rental housing (6%), or subsidized housing loans (3%) to employees in the next 12 months.

Question 17 Please indicate whether your business currently offers the following benefits to employees.

Question 18 In the next 12 months, would your business be willing to offer the following programs to help offset the cost of employee housing?

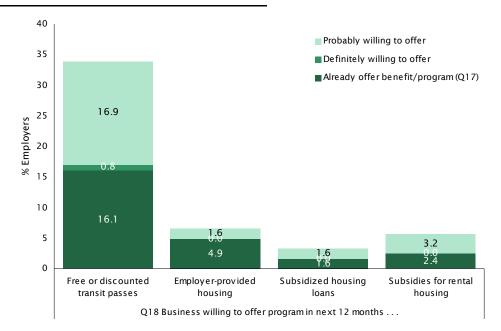


FIGURE 21 WILLINGNESS TO OFFER BENEFIT IN NEXT 12MONTHS

CURRENT EMPLOYMENT

The prior sections of this report conveyed the results of the Employer Survey. Beginning with this section and carrying through the remainder of this report, the discussion centers on the results of the Employee Survey. The initial questions in the Employee Survey profiled respondents' current employment status, tenure of employment, and the educational requirements of their position.

EMPLOYMENT STATUS, TENURE & EDUCATIONAL REQUIREMENTS OF POSI-

TION Table 1 profiles employment status, tenure, and the educational requirements of the more than 2900 employees surveyed who work in the South Coast. The vast majority (90%) of those surveyed work on a full-time basis, although the amount of time they had been employed in the South Coast area was quite mixed with one-quarter (26%) working in the South Coast less than five years, one-third (32%) between five and 14 years, and the remainder (42%) having been employed in the South Coast at least 15 years. The majority of employees surveyed (58%) indicated that their current position requires a four-year college degree, although just 15% indicated that their current position requires a graduate degree such as a Masters Degree, M.B.A., Ph.D., or J.D.

Question 1 To begin, how long have you been employed in the South Coast area?

Question 2 Are you currently employed full-time or part-time?

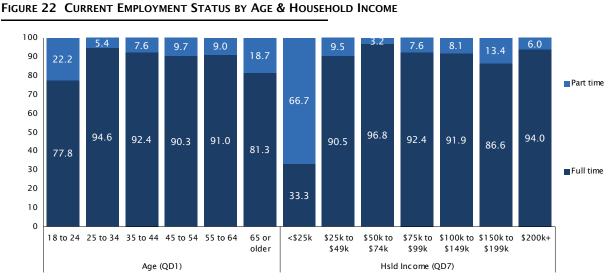
Question 3 Does your current position require a four-year college degree?

Question 4 Does your current position require a graduate degree such as an MBA, M.A., M.S, JD or Ph.D.?

Q1 Years in South Coast Area	
Less than 2	11.6
2 to 4	14.2
5 to 9	15.5
10 to 14	16.2
15 to 19	11.3
20 to 29	15.9
30+	15.1
Not sure / Refused	0.2
Q2 Employment status	
Full time	90.4
Part time	9.2
Not sure / Prefer not to answer	0.4
Q3 Position requires 4 year college degree	
Yes	58.0
No	35.5
Not sure / Prefer not to answer	6.5
Q4 Position requires graduate degree	
Yes	15.4
No	76.4
Not sure / Prefer not to answer	8.1

TABLE 2	CURRENT	EMPLOYMENT	STATUS
	CONNENT	ENH LOTHERT	31/1103

For the interested reader, Figures 22-25 show how employment status and the educational requirements of their current position varied across key subgroups of South Coast employees. As one might expect, there was a positive relationship between household income and the educational requirements of their current position, with those in the upper income brackets being much more likely to hold positions that require a graduate degree (see Figure 24). Nevertheless, it is striking that even among households earning less than \$50,000 annually, approximately four-in-ten indicated that their position requires a four-year college degree.





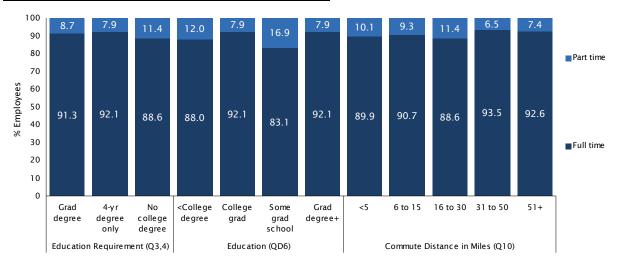




FIGURE 24 EDUCATION REQUIREMENT BY AGE & HOUSEHOLD INCOME

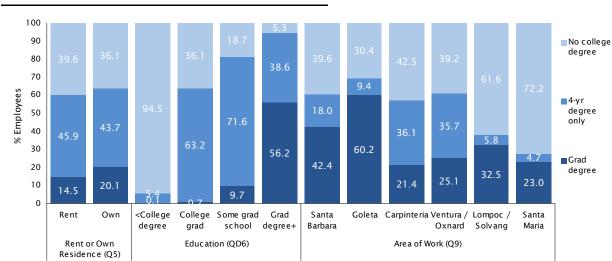


FIGURE 25 EDUCATION REQUIREMENT BY RENT OR OWN RESIDENCE, EDUCATION & AREA OF WORK

CURRENT HOUSING & COMMUTE SITUATION

Having captured basic information about their employment status, the Employee Survey next turned to profiling the respondent's current *housing* situation including ownership status, housing type, location, and length of residence, as well as *commute* characteristics including distance, length and primary mode.

OWNERSHIP STATUS Overall, less than half (43%) of South Coast employees surveyed indicated that they own their current residence (Figure 26), with the majority indicating that they rent their residence (53%) or live rent free with someone (4%).

Question 5 Do you rent or own your current residence?

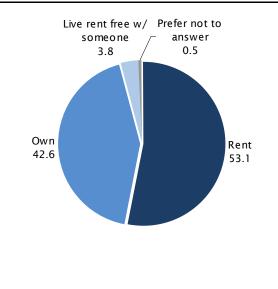


FIGURE 26 RENT OR OWN RESIDENCE

Home ownership status among South Coast employees was strongly related to certain demographic characteristics including the length of time they've worked in the South Coast, age, household income, and location of residence (see Figures 27-30). At the extremes, for example, 78% of employees who have worked in the South Coast less than five years indicated that they rent their home, whereas the corresponding figure among those who have worked in the South Coast at least 30 years was 23%. Similarly, 92% of employees enjoying household incomes of \$200,000 or more annually owned their home, whereas less than 4% of those earning less than \$25,000 per year owned their home.

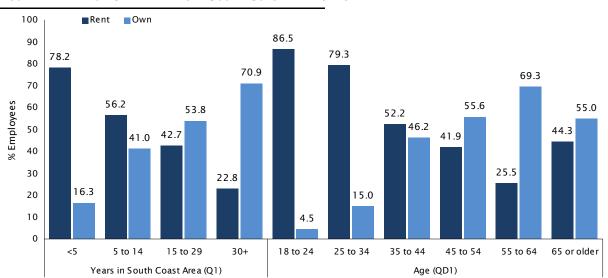
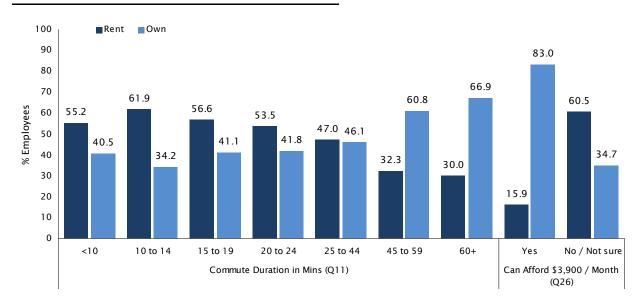
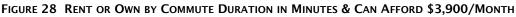


FIGURE 27 RENT OR OWN BY YEARS IN SOUTH COAST AREA & AGE

Several other patterns are noteworthy, including the relationship between home ownership and location of residence. Employees who work on the South Coast but commute from outside areas were much more likely to be home owners when compared to those who work and live in the South Coast. For example, just 36% of employees who live in the City of Santa Barbara reported that they own their current home, whereas more than two-thirds of those that commute from Ventura for their South Coast job stated they own their home (see Figure 30).





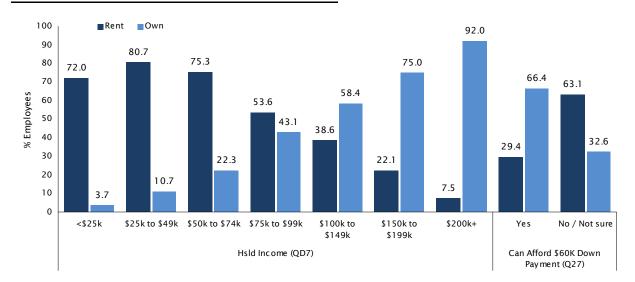


FIGURE 29 RENT OR OWN BY HOUSEHOLD INCOME & CAN AFFORD & \$60K DOWN PAYMENT

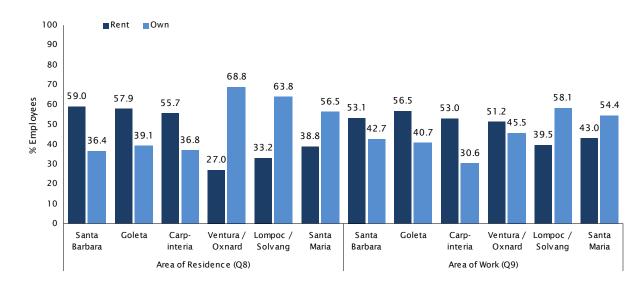


FIGURE 30 RENT OR OWN BY AREA OF RESIDENCE & AREA OF WORK

LENGTH OF RESIDENCE AT CURRENT LOCATION South Coast employees are quite diverse in terms of the length of time they have resided at their current residence (see Figure 31). The majority of those surveyed (54%) indicated that they had lived in their current home four years or less, with nearly one-third (31%) indicating that they had lived in their current residence less than two years. Approximately one-quarter (26%) of South Coast employees offered that they had resided at the current residence between five and 14 years, whereas 19% had lived at their current residence for 15 years or longer.

Question 6 How long have you lived in your current residence?

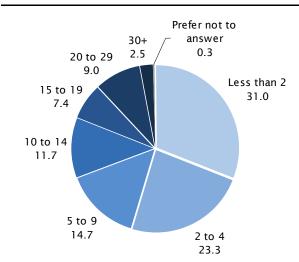
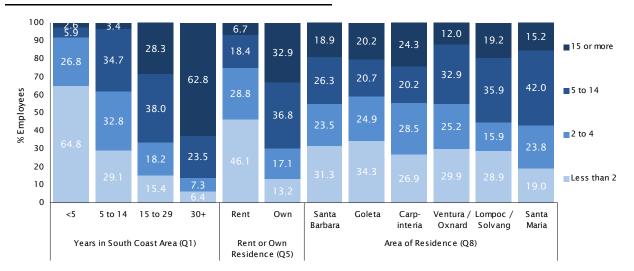


FIGURE 31 YEARS LIVING IN CURRENT RESIDENCE

Length of residence in their current location and years of employment in the South Coast were positively correlated as one would expect (see Figure 32). The relationship between home ownership status and length of residence in their current location was also consistent with expectations, with more than twothirds of renters living in their current location *less* than five years, compared to two-thirds of home owners living in their current location *at least* five years. FIGURE 32 YEARS LIVING IN CURRENT RESIDENCE BY YEARS IN SOUTH COAST AREA, RENT OR OWN RESIDENCE & AREA OF RESIDENCE



HOUSING TYPE Turning now to the *type* of housing utilized by South Coast employees, just over half (53%) offered that they currently live in a single family residence, with the remainder living in an apartment (26%), condominium (10%), townhome (9%), or mobile home (2%). As was the case with home ownership status, there are strong relationships between housing type and employee demographics (see Figures 34-36). The longer one had worked in the South Coast and the greater one's household income, the more likely an employee was to live in a single family residence. Similarly, employees 35 years of age or older, home owners, and those living outside the South Coast were substantially more likely than their respective counterparts to live in a single family residence.

Question 7 Which of the following best describes your current residence?

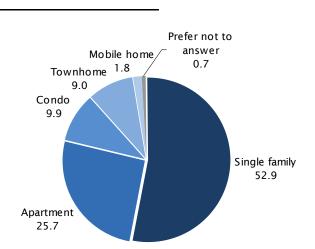
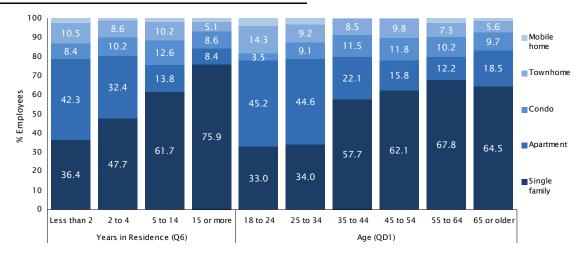


FIGURE 33 TYPE OF RESIDENCE







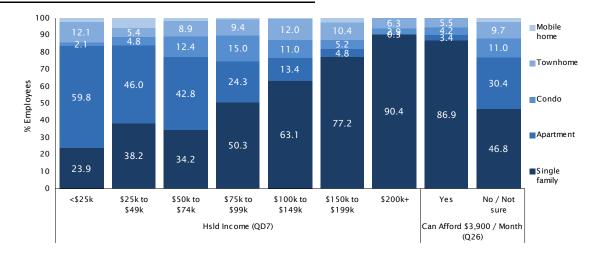
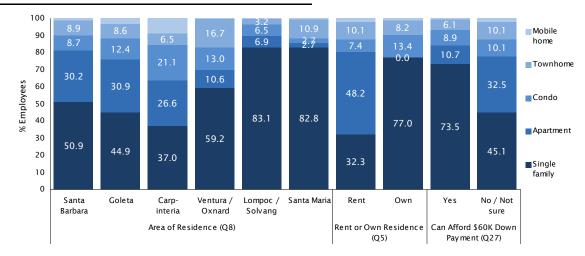


FIGURE 36 TYPE OF RESIDENCE BY AREA OR RESIDENCE, RENT OR OWN RESIDENCE & CAN AFFORD \$60K DOWN PAYMENT



LOCATION OF RESIDENCE & WORK Questions 8 and 9 in the Employee Survey inquired as to the location of an employee's residence and place of work, respectively. Figure 37 presents the results to these two questions in a side-by-side format as it makes the extent of the jobs/housing imbalance in the South Coast region quite clear. The City of Santa Barbara accounts for 76% of employees' work places, but just 52% of South Coast employees live in the City of Santa Barbara. Adding the City of Santa Barbara and the City of Goleta together, one accounts for 94% of employees' work locations, but a smaller percentage (75%) of employees' residences.

Question 8 What is the Zip Code of your current residence?

Question 9 What is the Zip Code of your current place of work?

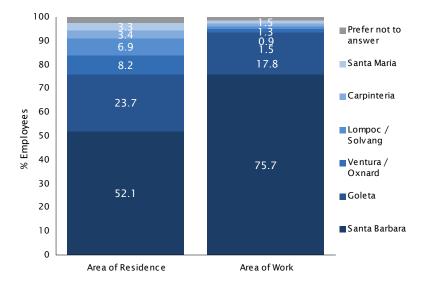


FIGURE 37 AREA OF RESIDENCE & CITY OF WORK

Table 3 presents the distribution of all employees' surveyed according to their area of residence *and* area of work. The percentages in each cell denote the percentage of all employees who indicated they live and work in a particular combination of areas. Thus, for example, 43% of South Coast employees indicated that they live *and* work in the City of Santa Barbara. Overall, just under half (49%) of employees who work in the South Coast live in the same city as they work. Approximately 80% of South Coast employees live in a South Coast community, whereas the remainder commute into the South Coast from outlying areas including Ventura, Oxnard, Lompoc, Solvang, and Santa Maria.

		Area of Work (Q9)						
		Santa Barbara	Goleta	Carpinteria	Ventura / Oxnard	Lompoc / Solvang	Santa Maria	
(8)	Santa Barbara	43.1	8.8	1.0	0.4	0.0	0.0	
of e (Q8)	Goleta	18.6	5.5	0.1	0.0	0.0	0.0	
Area c Residence	Carpinteria	2.6	0.5	0.1	0.3	0.0	0.0	
	Ventura / Oxnard	5.8	1.9	0.1	0.5	0.0	0.0	
	Lompoc / Solvang	5.0	1.0	0.0	0.2	0.8	0.1	
	Santa Maria	1.6	0.3	0.0	0.0	0.1	1.4	

Table 4 presents the same analysis for home owners who have worked in the South Coast less than 10 years. When compared to employees in general, substantially fewer home owners who have worked in the South Coast less than 10 years live in the same South Coast community where they work (40%) or live in the South Coast at all (64%).

-							
		Area of Work (Q9)					
					Ventura /	Lompoc /	
		Santa Barbara	Goleta	Carpinteria	Oxnard	Solvang	Santa Maria
á	😥 🛛 Santa Barbara	30.6	5.9	0.5	0.3	0.0	0.0
Area of Residence (Q8)	Ϋ Goleta	16.5	9.2	0.0	0.0	0.0	0.0
	ပ္မီ Carpinteria	1.7	0.1	0.0	0.1	0.0	0.0
	yentura / Oxnard	10.1	5.5	0.1	1.6	0.0	0.0
	ی Lompoc / Solvang	9.5	1.4	0.1	0.0	0.7	0.3
	≚ Santa Maria	2.2	1.3	0.1	0.0	0.0	2.3

COMMUTE DISTANCE & DURATION All employees were next asked to describe their commute in terms of distance (miles) and duration. With respect to commute distance (see Figure 38), more than three-quarters of employees (79%) indicated that their commute was 15 miles or less, with 42% commuting less than five miles. The remaining employees reported one-way commute distances of 16 to 30 miles (5%), 31 to 50 miles (11%), or greater than 50 miles (4%).

Question 10 In miles, what is the approximate distance between your residence and your place of work?

Question 11 If you don't make any stops along the way, how long does it typically take you to commute to work, one way?

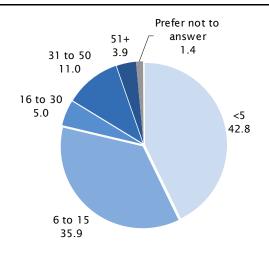
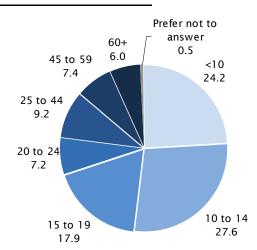


FIGURE 38 COMMUTE DISTANCE IN MILES

If they don't make stops along the way, approximately half (52%) of employees surveyed reported that their commute to work takes less than 15 minutes, and an additional quarter (25%) offered that their commute typically takes between 15 and 24 minutes. Longer commute times of 25 to 44 minutes (9%), 45 to 59 minutes (7%), and one hour or greater (6%) were reported by more than one-in-five South Coast employees (see Figure 39)

Overall, the average one-way commute distance and duration were 13.4 miles and 21.2 minutes, respectively.

FIGURE 39 COMMUTE IN MINUTES



Figures 40-42 show the average commute distance and duration across a variety of employee subgroups. It is noteworthy that the average commute distance and duration were substantially higher for home owners when compared to renters, which supports the notion that South Coast employees are generally having to choose homes further away from their place of work and endure longer commutes if they wish own their residence. Moreover, South Coast employees who reside outside the South Coast reported average one-way commute distances of at least 40 miles, meaning that they are commuting at least 80 miles each day when they travel to and from work.

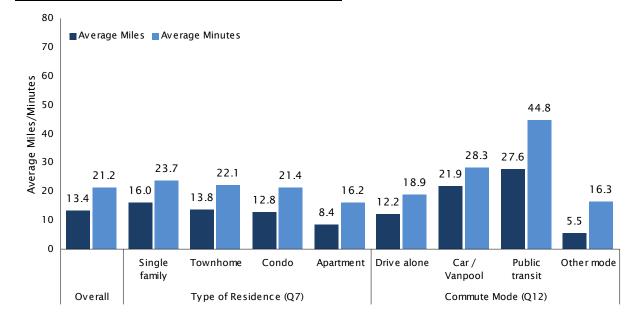


FIGURE 40 AVERAGE COMMUTE IN MILES & MINUTES BY OVERALL, TYPE OF RESIDENCE & COMMUTE MODE

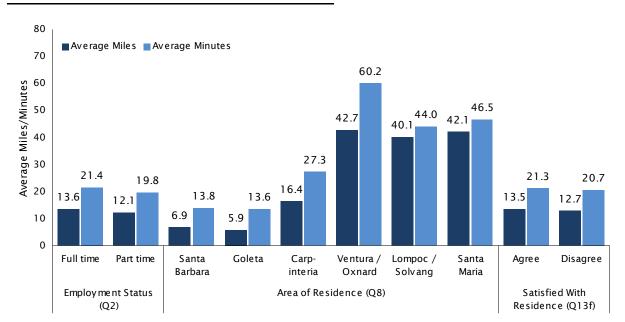
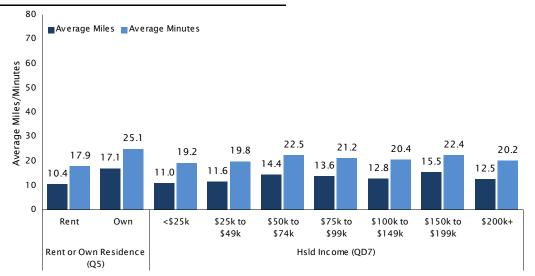


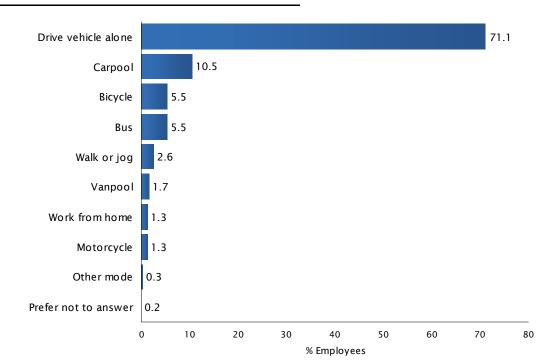
FIGURE 41 AVERAGE COMMUTE IN MILES & MINUTES BY EMPLOYMENT STATUS, AREA OF RESIDENCE & SATISFIED WITH RESIDENCE

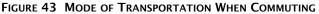
FIGURE 42 AVERAGE COMMUTE IN MILES & MINUTES BY RENT OR OWN RESIDENCE & HOUSEHOLD INCOME



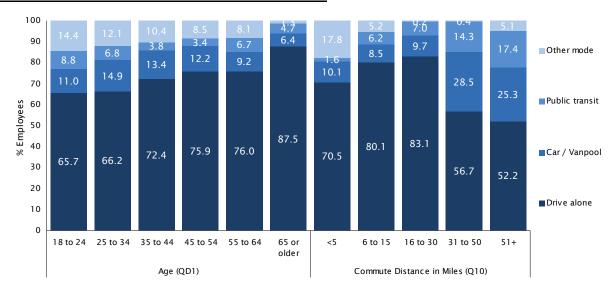
PRIMARY COMMUTE MODE The final question in this series asked employees to identify the method of transportation (mode) they use most of the time when commuting to work (see Figure 43). More than eight-in-ten South Coast employees indicated that they *primarily* use a personal vehicle when commuting to work, either by driving alone (71%) or carpooling with one or more individuals (11%). Other primary modes used by South Coast employees when commuting to work included bicycling (6%), riding the bus (6%), walking/jogging (3%), vanpooling (2%), and riding a motorcycle (1%). Just 1% of South Coast employees surveyed indicated that they primarily telecommute. Figures 44-46 show how primary commute mode varies across subgroups of South Coast employees.

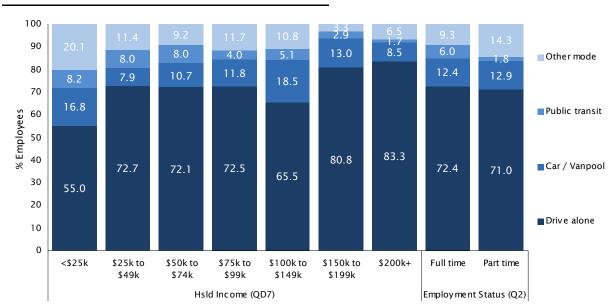
Question 12 Which one of the following methods of transportation do you use most of the time when commuting to work?





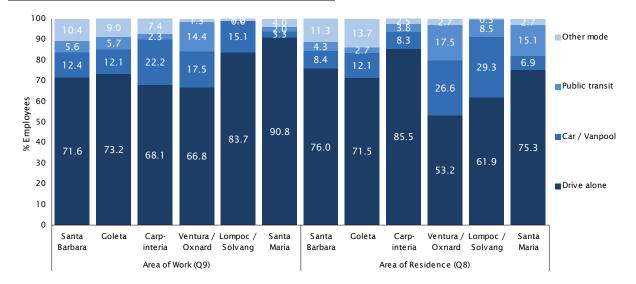












3

A DEQUACY OF HOUSING

As noted in the *Introduction*, one of the primary purposes of this study was to identify the extent to which the housing market in the South Coast is simply out-of-reach of employees who work in the area. In other words, what percentage of South Coast employees are unable to rent or own a suitable home within a reasonable commute distance from their current work location? The questions presented in this section of the report form the basis for answering this and related questions.

ASSESSMENT OF CURRENT RESIDENCE The first question in this section asked South Coast employees to characterize their current home on dimensions that individuals generally take into consideration when selecting a home. The nature of Question 13 was straightforward— employees were simply asked the degree to which they agreed or disagreed that their current residence met each of the standards shown on the left of Figure 47. To allow for an apples-to-apples comparison of the results across each standard, only those who held an opinion are factored into the percentage results represented in the bars. The percentage who held an opinion for a dimension is shown in the brackets to the right of the standard description.

Question 13 For each of the following statements, please indicate if you agree or disagree that the statement matches your opinion.

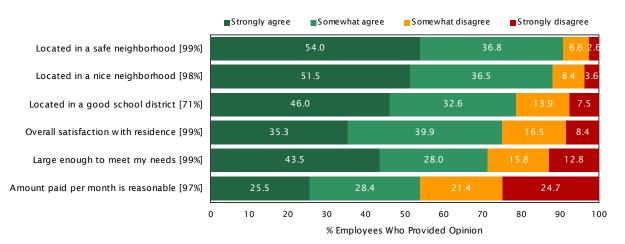


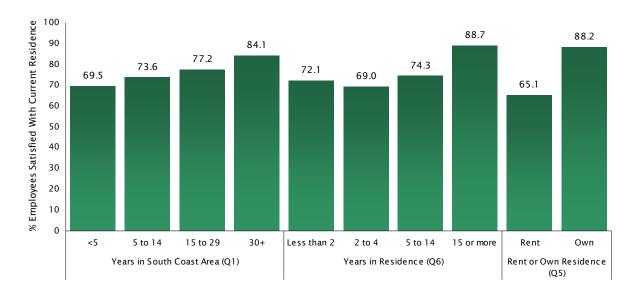
FIGURE 47 AGREEMENT WITH STATEMENTS ABOUT RESIDENCE

Overall, the vast majority of South Coast employees indicated that their current home is located in a safe (91%) and nice (88%) neighborhood with a good school district (79%). More than twothirds (72%) also indicated that their current home is large enough to meet their needs, although a bare majority (54%) felt that the amount they pay per month to have their current home is reasonable. Approximately three-quarters (75%) of South Coast employees offered that—overall they were satisfied with their current residence, whereas 25% were unsatisfied.

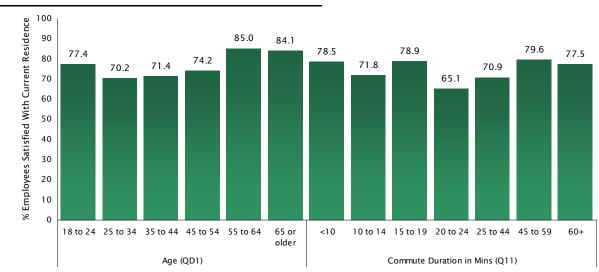
Figures 48-52 present the percentage of South Coast employees who indicated that they were satisfied, overall, with their current residence across a variety of subgroups. Several patterns are noteworthy, with the most obvious being that employees who are long-time South Coast employees (30+ years), have lived in the region 15 years or longer, currently own their residence, are

Adequacy of Housing

older (55+), and live in a single family home or condominium were the most likely to report being satisfied with their current residence. At the other end of the spectrum, those who moved to the South Coast after the start of the housing market boom in early 2000, renters, apartment dwellers, and those earning between \$25,000 and \$49,999 annually were much less likely to report being satisfied with their current residence.









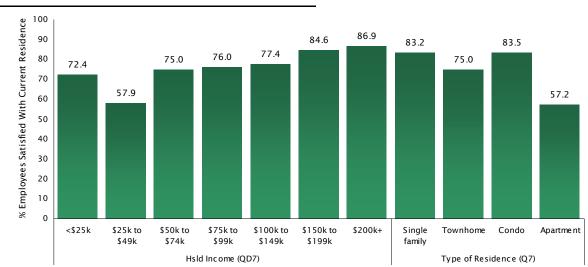
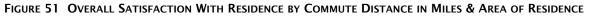
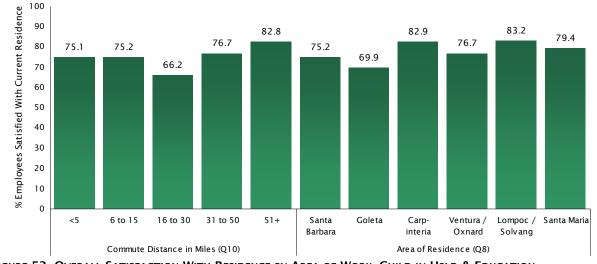
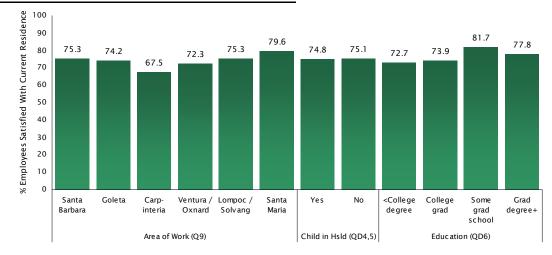


FIGURE 50 OVERALL SATISFACTION WITH RESIDENCE BY HSLD INCOME & TYPE OF RESIDENCE









Figures 53-57 examine the results to Question 13 using a more inclusive *index* approach, where the response to each standard tested in Question 13 is assigned a value (strongly agree +2; somewhat agree +1; somewhat disagree -1; strongly disagree -2) and the scores are summed to create an *Adequacy Index* score. The Adequacy Index score has a possible range from -12 to +12. The higher the score, the better the current residence meets the needs of the employee on the dimensions tested.

Among all South Coast employees, the average Adequacy Index score was 4.79—although it ranged substantially across subgroups. Consistent with the findings noted above, employees who have worked in the South Coast at least 30 years, those who have lived in their current residence 15 years or longer, home owners, older employees, high income households, and those living in single family homes and condominiums exhibited Adequacy Index scores that were substantially higher than average. Renters, those who have lived in the South Coast at their current residence less than five years, those under 45 years of age, households earning less than \$100,000 annually, and employees who live in an apartment exhibited below-average Adequacy Index scores.

One of the other striking patterns in the figures is the relationship between geographic area of residence, commute distance, and employees' opinions about their current residence. South Coast employees who live outside the South Coast and commute longer distances to work provided much more positive assessments of their current residence when compared to their respective counterparts. Those who choose to endure longer commutes do so because they are able to afford a much nicer home in outlying areas when compared to what is within their budget in the South Coast, whereas those who choose to live in the South Coast are generally not as satisfied with the home they can afford.

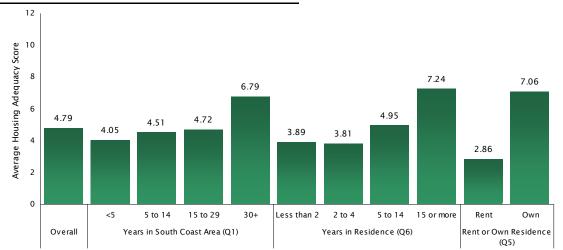


FIGURE 53 AVERAGE HOUSING ADEQUACY SCORE BY OVERALL, YEARS IN SOUTH COAST AREA, YEARS IN RESIDENCE & RENT OR OWN RESIDENCE

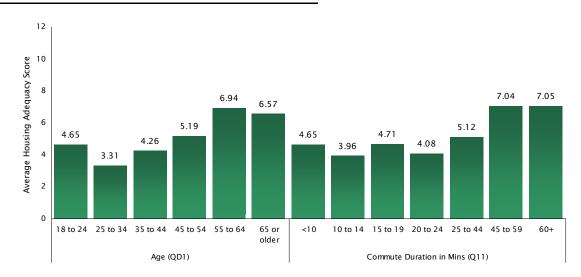
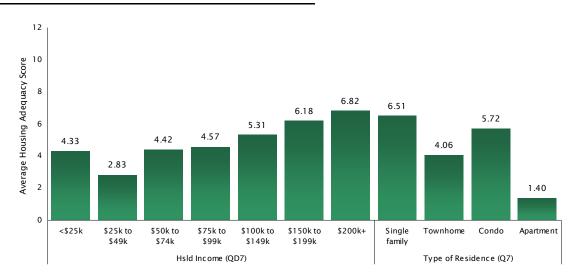


FIGURE 54 AVERAGE HOUSING ADEQUACY SCORE BY AGE & COMMUTE DURATION IN MINUTES





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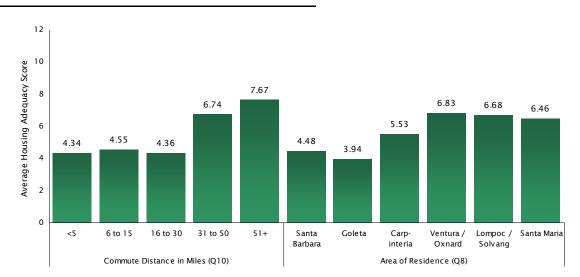
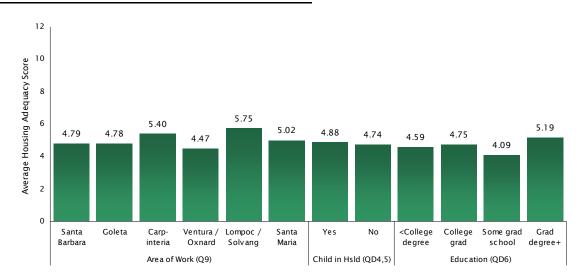


FIGURE 56 AVERAGE HOUSING ADEQUACY SCORE BY COMMUTE DISTANCE IN MILES & AREA OF RESIDENCE

FIGURE 57 AVERAGE HOUSING ADEQUACY SCORE BY AREA OF WORK, CHILD IN HSLD & EDUCATION



CAN YOU AFFORD TO PURCHASE A SUITABLE HOME WITH <25-MINUTE COM-MUTE? Whereas the prior questions focused on profiling employees' current housing situation, beginning with Question 14 the survey transitioned to exploring employees' perceptions of the affordability of the South Coast housing market. Question 14 was only asked of employees who currently rent their residence (57% of all employees), own their residence but commute greater than 25 minutes one-way to work (13%), or own their residence but were dissatisfied with it overall (3%). Employees who own their residence, live within a 25-minute commute of their place of work, and were satisfied with their home overall (27%) were not asked Question 14.

Among employees who met the criteria noted above, nearly nine-in-ten (88%) stated that they cannot afford to purchase a residence that would adequately meet their needs within a 25-minute drive of their current work location, whereas 7% were unsure. Just 4% of South Coast employees who met the criteria for Question 14 indicated that they could afford to purchase an adequate home within a 25-minute commute of their place of employment. **Question 14** In the current housing market, can you afford to purchase a residence that would adequately meet your needs within a 25-minute drive of your current work location?

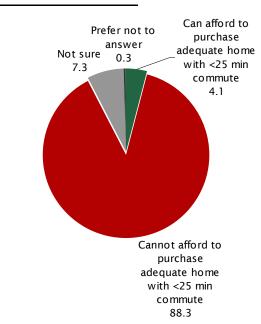


FIGURE 58 AFFORD TO PURCHASE ADEQUATE HOME WITH 25-MIN COMMUTE

Figures 59-63 place the results of Question 14 in the context of *all* employees, showing the percentage who are already in the position of interest (own home within 25-minute commute and are satisfied) or can afford to purchase a home that meets this condition. Overall, 30% of South Coast employees currently own a suitable home that is less than a 25-minute commute to their place of employment (27%) or can afford to do so (3%). As shown in the figures below, the ability to purchase an adequate home with a commute of less than 25 minutes varied dramatically by length of employment in the South Coast, years of residing at their current location, current home ownership status, age, current commute distance and duration, and household income.

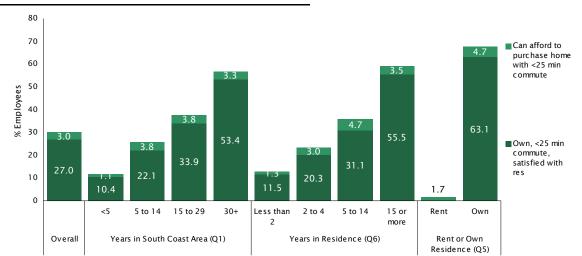
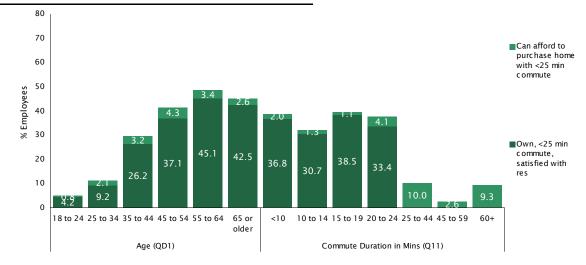


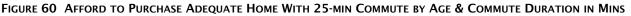
FIGURE 59 AFFORD TO PURCHASE ADEQUATE HOME WITH 25-MIN COMMUTE BY OVERALL, YEARS IN SOUTH COAST AREA, YEARS IN RESIDENCE & RENT OR OWN RESIDENCE



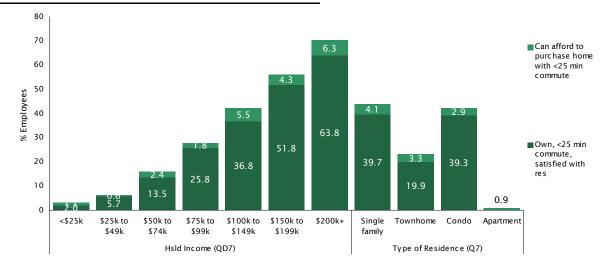
Adequacy of Housing

The ability to purchase a suitable home within a 25-minute commute of their current place of employment was widely perceived by South Coast employees to be an impossibility in the current housing market, although it was especially pronounced in certain segments. Indeed, employees under the age of 35, those currently commuting at least 25 minutes to work, employees from households earning less than \$50,000 annually, apartment dwellers, those commuting at least 30 miles to work, and employees who currently reside in Ventura, Oxnard, Lompoc or Solvang all had less than 12% of respondents indicate that they could afford to purchase a suitable home with less than a 25-minute commute to their current employer.









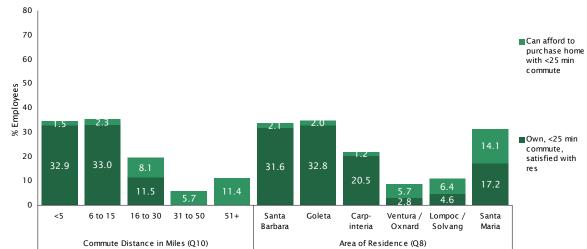
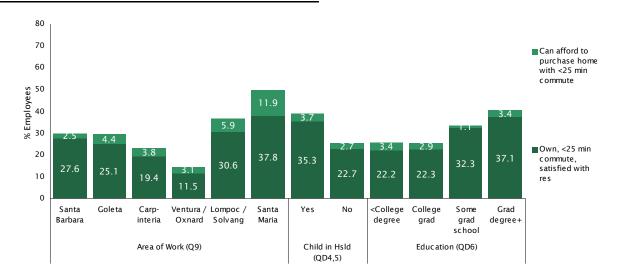


FIGURE 62 AFFORD TO PURCHASE ADEQUATE HOME WITH 25-MIN COMMUTE BY COMMUTE DISTANCE IN MILES & AREA OF RESIDENCE

FIGURE 63 AFFORD TO PURCHASE ADEQUATE HOME WITH 25-MIN COMMUTE BY AREA OF WORK, CHILD IN HSLD & EDUCATION



CAN YOU AFFORD TO RENT A SUITABLE HOME WITH <25-MINUTE COM-

MUTE? Similar to Question 14, Question 15 asked employees if they can afford to *rent* a residence that would adequately meet their needs within a 25-minute drive of their current work location. Question 15 was only asked of employees whose existing commute was 25 minutes or longer (23% of all employees) or those whose commute was shorter than 25 minutes, but they were dissatisfied with their current housing situation (19%). Employees with commutes shorter than 25 minutes and who were satisfied with their current residence (58%) were not asked Question 15.

Among those eligible to receive Question 15, 25% stated they could afford to rent an adequate residence within a 25-minute drive of their current work location, whereas 59% stated they could not afford to rent such a residence, and 16% were unsure or unwilling to answer the question (see Figure 64 on the next page).

Question 15 In the current housing market, can you afford to rent a residence that would adequately meet your needs within a 25-minute drive of your current work location?

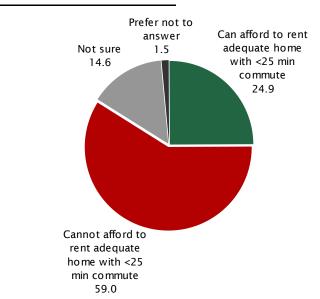


FIGURE 64 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE

Figures 65-69 place the results of Question 15 in the context of *all* employees, showing the percentage who are already in the position of interest (live within 25-minute commute and are satisfied with residence) or can afford to *rent* a home that meets this condition. Overall, 69% of South Coast employees currently live in a suitable home that is less than a 25-minute commute to their place of employment (58%) or can afford to rent such a property (10%). The ability to rent a suitable home with less than a 25-minute commute to work was strongly related to location of current residence, commute distance, and commute time, with those living in outlying communities with longer commutes being far less likely to report having the ability to afford a suitable residence with less than a 25-minute commute to their current place of work in the South Coast.

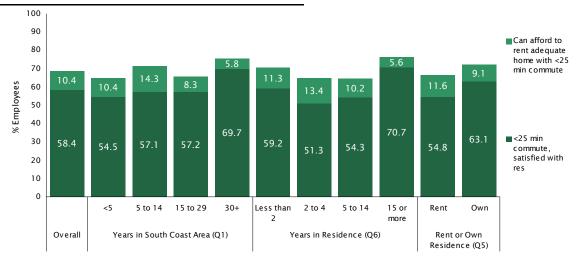


FIGURE 65 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE BY OVERALL, YEARS IN SOUTH COAST AREA, YEARS IN RESIDENCE & RENT OR OWN RESIDENCE



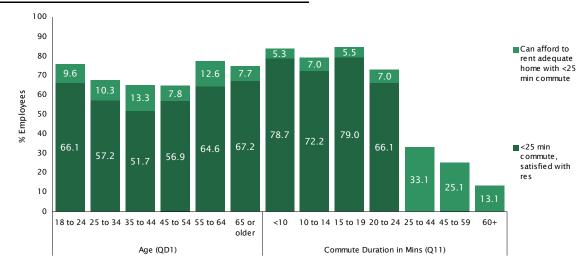


FIGURE 66 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE BY AGE & COMMUTE DURATION IN MINS

FIGURE 67 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE BY HSLD INCOME & TYPE OF RESIDENCE

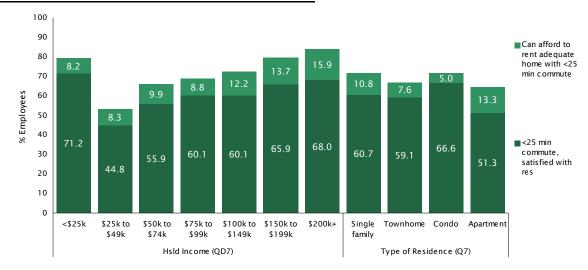
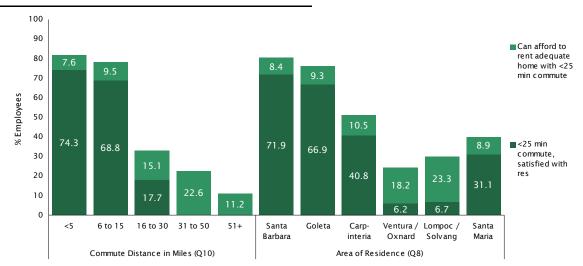


FIGURE 68 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE BY COMMUTE DISTANCE IN MILES & AREA OF RESIDENCE



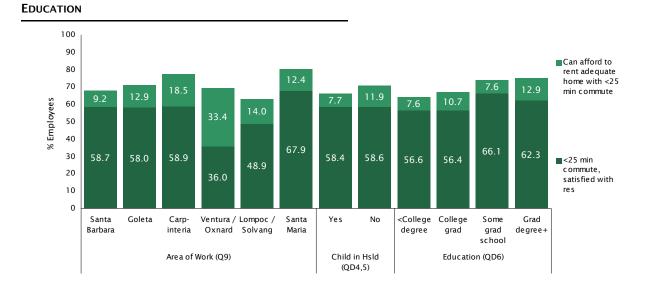


FIGURE 69 AFFORD TO RENT ADEQUATE HOME WITH 25-MIN COMMUTE BY AREA OF WORK, CHILD IN HSLD &

HAVE YOU SEARCHED FOR A RESIDENCE CLOSER TO WORK? South Coast employees who reported having a commute of 25 minutes or longer (one-way) were subsequently asked several questions regarding their search for a home closer to their place of employment. The first question in this series simply asked whether they have actively searched for suitable housing closer to their current work location. More than half (56%) of South Coast employees with commutes longer than 25 minutes offered that they had actively searched for housing closer to their place of employment, whereas 41% had not and 2% were unsure or preferred not to answer the question (Figure 70).

Question 16 You previously indicated that your commute to work is at least 25 minutes, one way. Have you actively searched for suitable housing closer to your current work location?

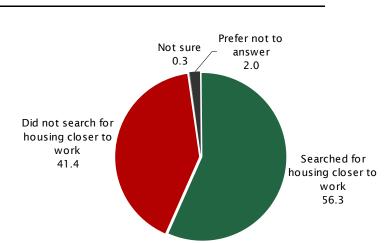


FIGURE 70 SEARCHED FOR HOUSING CLOSER TO WORK

In general, the tendency to have actively searched for suitable housing closer to one's work declined with years working in the South Coast, years living in one's current location, age, and income (see Figures 71-76).

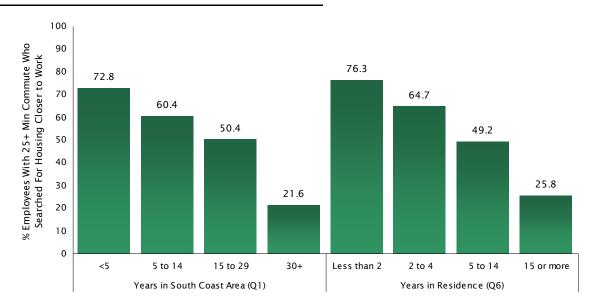
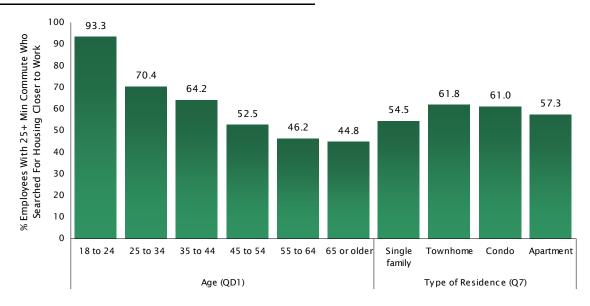


FIGURE 71 SEARCHED FOR HOUSING CLOSER TO WORK BY YEARS IN SOUTH COAST AREA & YEARS IN RESIDENCE





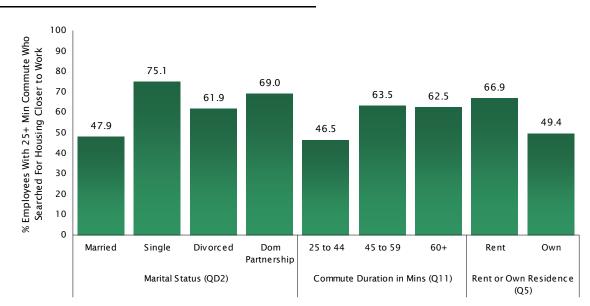
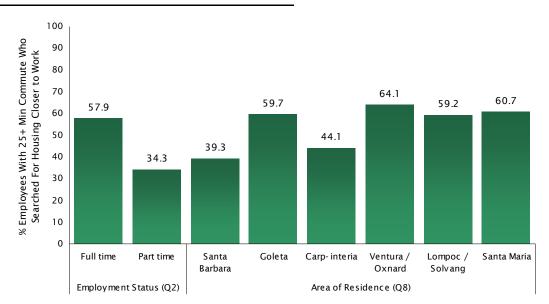


FIGURE 73 SEARCHED FOR HOUSING CLOSER TO WORK BY MARITAL STATUS, COMMUTE DURATION IN MINS & RENT OR OWN RESIDENCE









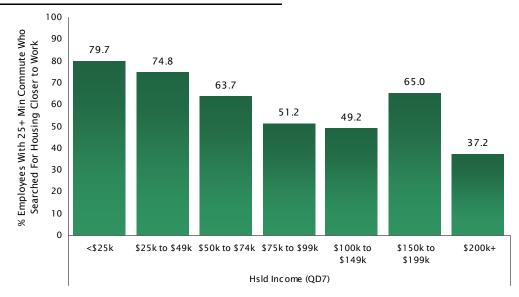
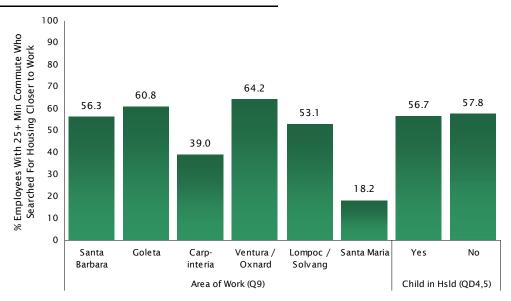


FIGURE 76 SEARCHED FOR HOUSING CLOSER TO WORK BY AREA OF WORK & CHILD IN HSLD



SEARCHING FOR HOME TO PURCHASE OR RENT? South Coast employees who commute at least 25 minutes to work *and* reported that they had searched for suitable housing closer to their employer were also asked whether they were seeking rental housing or a home to purchase. Figure 77 on the next page combines the answers to Question 16 and 17 and places them in the context of *all* South Coast employees with a commute of 25 minutes or longer. Among South Coast employees who currently commute at least 25 minutes to work, 18% had only searched for suitable rental housing closer to their place of employment, 17% had only searched for a home to purchase, 19% reported searching for both rental housing and a home to purchase, whereas 41% had not searched for suitable housing closer to their employer and 4% were unsure or preferred to not answer the question. Figures 78-83 show the percentage of South Coast employees (by subgroup) with commutes of 25 minutes or more that actively searched for rental housing closer to their employer, a home to purchase, or both.

Coastal Housing Coalition

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Question 17 Were you searching for rental housing or a house to purchase?

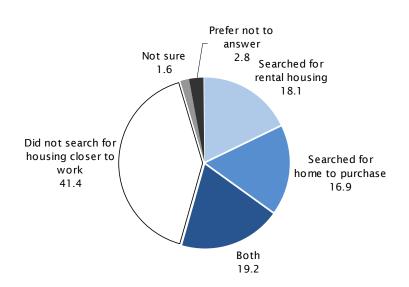
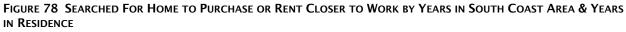
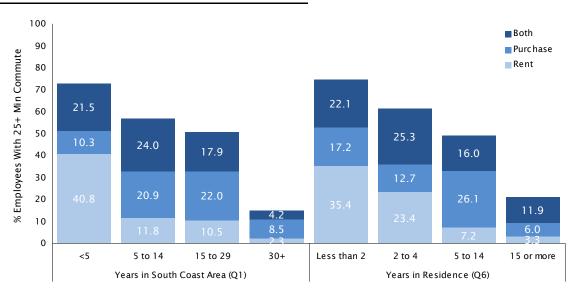


FIGURE 77 SEARCHED FOR HOME TO PURCHASE OR RENT CLOSER TO WORK





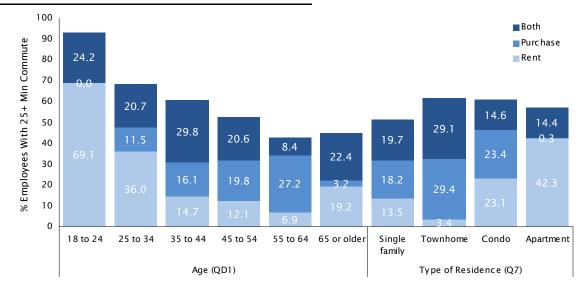
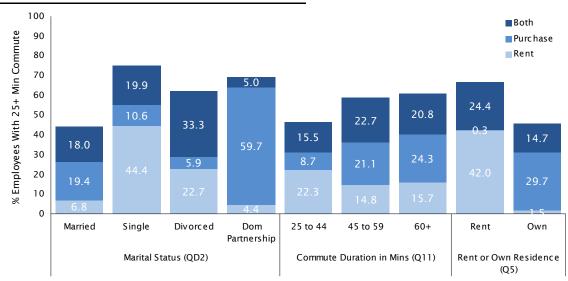


FIGURE 79 SEARCHED FOR HOME TO PURCHASE OR RENT CLOSER TO WORK BY AGE & TYPE OF RESIDENCE





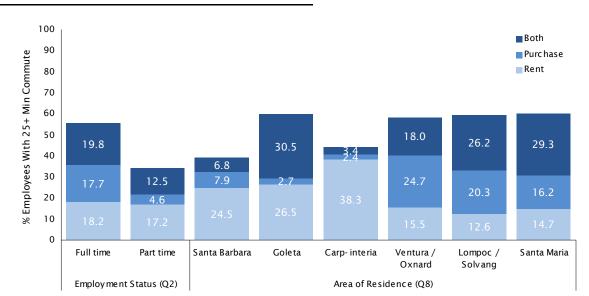
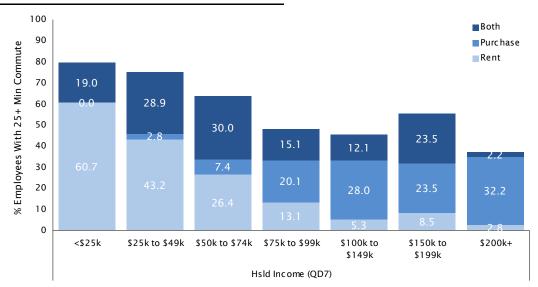


FIGURE 81 SEARCHED FOR HOME TO PURCHASE OR RENT CLOSER TO WORK BY EMPLOYMENT STATUS & AREA OF RESIDENCE





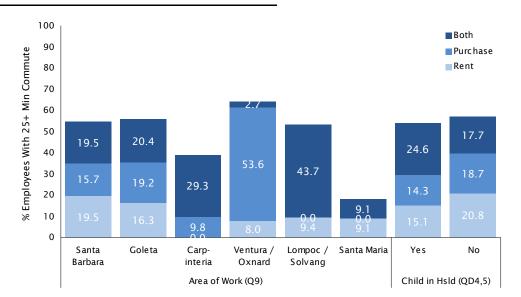


FIGURE 83 SEARCHED FOR HOME TO PURCHASE OR RENT CLOSER TO WORK BY AREA OF WORK & CHILD IN HSLD

WERE YOU ABLE TO LOCATE SUITABLE HOUSING CLOSER TO EMPLOYER?

The final question in this series asked those who had actively searched for housing closer to their employer whether they were able to find any suitable residences they could afford. Figure 84 places the results of Question 18 in the context of all South Coast employees with a one-way commute of 25 minutes or longer. Overall, just 2% of South Coast employees in this group actively searched for and found suitable housing they could afford within a 25-minute commute of their current employer, whereas 53% were unable to find suitable housing they could afford closer to their employer, 41% did not search for housing closer to their work, and 3% were unsure or unwilling to answer the question.

Question 18 Were you able to locate any suitable residences that you could afford?

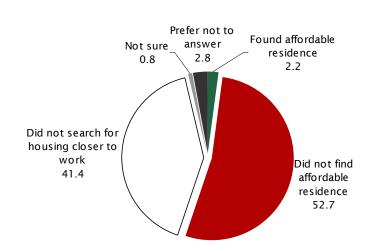


FIGURE 84 ABLE TO FIND SUITABLE, AFFORDABLE HOME



ΙΜΡΑϹΤS

The jobs/housing imbalance in the South Coast and the associated lack of affordable housing is more than an economic issue. On a regional level it contributes to traffic congestion, wear-and-tear on infrastructure, and environmental impacts. It also has the potential to impact employees' productivity, lifestyles, community engagement, and overall quality of life. For South Coast employees who currently commute at least 25 minutes to work (one-way), the survey explored how their commute impacts their quality of life, as well as the trade-offs they've considered making to reduce their commute given the lack of affordable housing closer to their employer.

NEGATIVE IMPACTS OF COMMUTE The first question in this series asked employees the extent to which their work commute impacts them in the ways described on the left of Figure 85. Approximately two-thirds of South Coast employees with a one-way commute of 25 minutes or more indicated that their commute significantly reduces the amount of time they would otherwise spend with their family (72% a lot or somewhat) and their involvement in their local community (64%). Most South Coast employees with a one-way commute of 25 minutes or longer also indicated that their commute reduces opportunities to collaborate and network with other employees (59% a lot or somewhat), reduces their overall quality of life (54%), and causes them stress (53%). Approximately one-third of employees (32%) also stated their commute of 25 minutes or longer reduces their productivity at work a lot or somewhat.

Question 19 Please indicate whether your work commute has the following impacts...

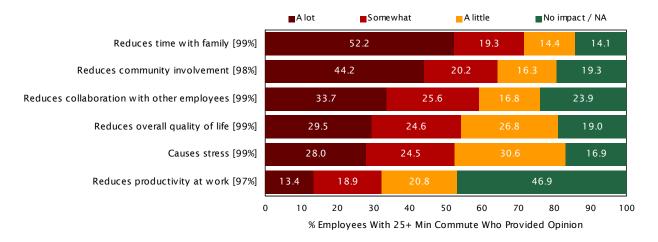


FIGURE 85 IMPACTS OF 25+ MIN COMMUTE

Figures 86-90 examine the results to Question 19 by deriving a *Commute Impacts Index*, where the response to each item tested in Question 19 is assigned a value (A Lot +3; Somewhat +2; A Little +1; None/NA 0) and the scores are summed. The Commute Impacts Index has a possible range from 0 to +18. The higher the score, the greater the negative impacts of an employee's commute. Overall, the average *Commute Impacts Index* score for South Coast employees was 9.82, although naturally it was somewhat higher among employees' whose one-way commute was 45 minutes or longer.

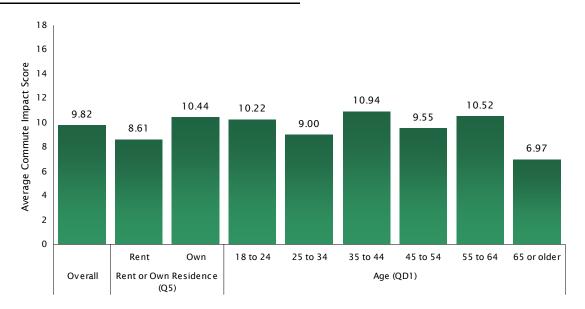
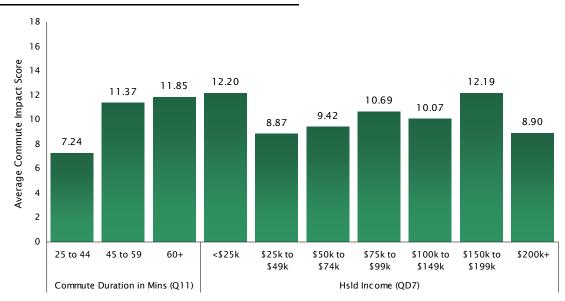


FIGURE 86 AVERAGE COMMUTE IMPACT SCORE BY OVERALL, RENT OR OWN RESIDENCE & AGE





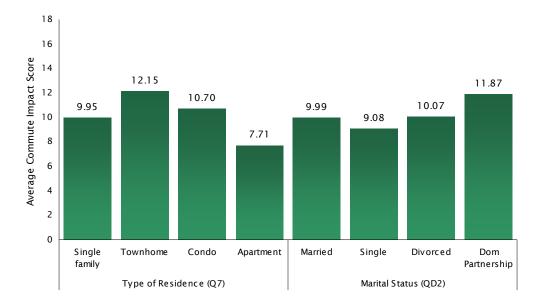
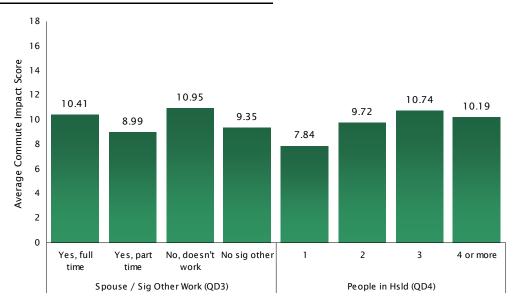


FIGURE 88 AVERAGE COMMUTE IMPACT SCORE BY TYPE OF RESIDENCE & MARITAL STATUS





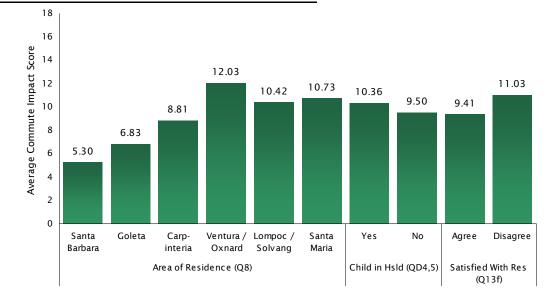


FIGURE 90 AVERAGE COMMUTE IMPACT SCORE BY AREA OF RESIDENCE, CHILD IN HSLD & SATISFIED WITH RES

HAVE YOU CONSIDERED CHANGING EMPLOYERS TO REDUCE COMMUTE? In

the Employer Survey, it was discovered that most South Coast employers find it difficult to retain quality employees due to the lack of affordable housing in the South Coast (see *Specific Impacts of Housing on South Coast Businesses* on page 17). One way in which an organization can lose a quality employee is by the employee choosing to work for another company closer to their current home. Among South Coast employees with commutes of 25 minutes or more, 40% indicated that they have considered changing employers so they can work closer to their current residence (Figure 91). A willingness to consider changing employers to work closer to home was especially pronounced among 35 to 44 year olds, those earning less than \$25,000 annually, and those who indicated their commute reduces their quality of life a lot or somewhat (see Figures 92-96).

Question 20 Have you considered changing employers so that you can work closer to your current residence?

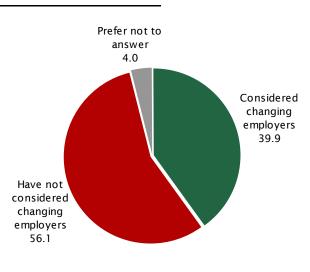


FIGURE 91 CONSIDERED CHANGING EMPLOYERS

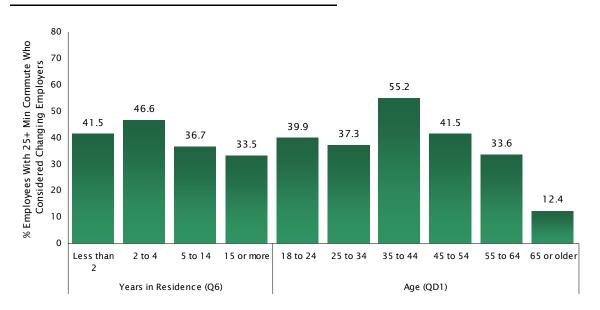
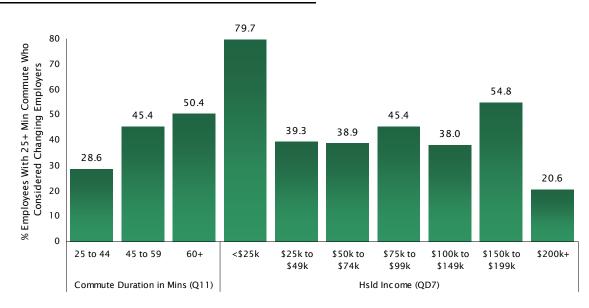


FIGURE 92 CONSIDERED CHANGING EMPLOYERS BY YEARS IN RESIDENCE & AGE





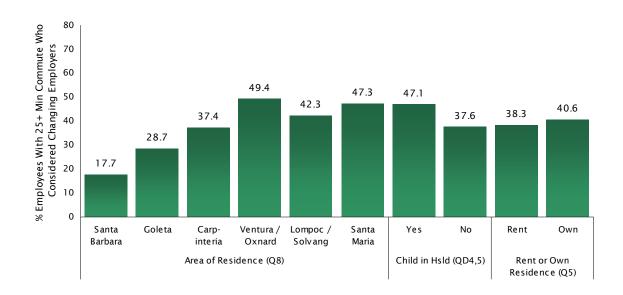
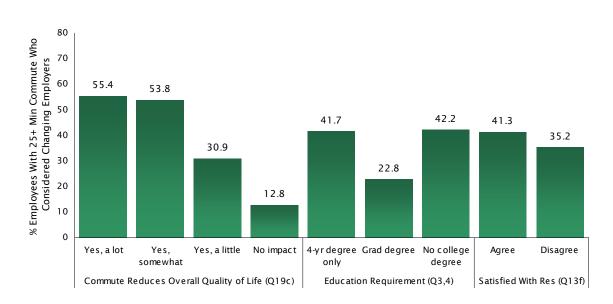


FIGURE 94 CONSIDERED CHANGING EMPLOYERS BY AREA OF RESIDENCE, CHILD IN HSLD & RENT OR OWN RESIDENCE

FIGURE 95 CONSIDERED CHANGING EMPLOYERS BY COMMUTE REDUCES OVERALL QUALITY OF LIFE, EDUCATION REQUIREMENT & SATISFIED WITH RES



HAVING YOU CONSIDERED LEAVING THE SOUTH COAST? A lack of affordable housing within a reasonable commute to one's employer can also create pressure to relocate to a region where housing is more affordable. Among the 70% of South Coast employees that could not afford to purchase a home with less than a 25-minute commute to their current employer, two-thirds (68%) indicated they have considered leaving the South Coast entirely so they can work and live in a region where housing is more affordable (see Figure 96). Among *all* South Coast employees (see Figure 97), this translates to more than four-in-ten employees (44%) having considered leaving the South Coast to live and work in a region where housing is more affordable.

Question 21 Have you considered leaving the South Coast so you can work and live in a region where housing is more affordable?

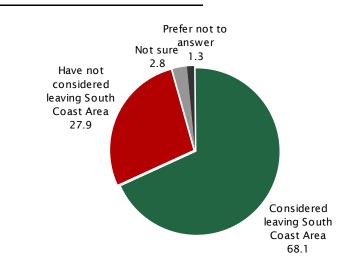
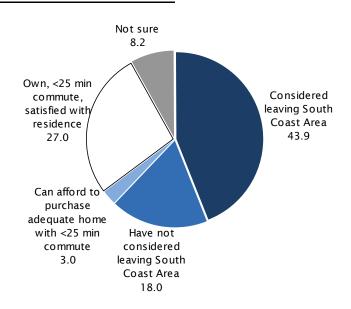


FIGURE 96 CONSIDERED LEAVING SOUTH COAST AREA





Figures 98-102 display the percentage of all South Coast employees (by subgroup) who have considered leaving the South Coast to live and work in a region where housing is more affordable. As one might expect, the tendency to consider leaving the South Coast entirely was inversely related to how long one had worked on the South Coast, lived in their current location, and annual household income. Renters, employees under 35 years of age, and those living in apartments were also much more likely than their respective counterparts to have considered leaving the South Coast to live and work in a region where housing is more affordable.

FIGURE 98 HOME AND COMMUTE STATUS WITH CONSIDERED LEAVING SOUTH COAST AREA BY YEARS IN SOUTH COAST AREA, YEARS IN RESIDENCE & RENT OR OWN RESIDENCE

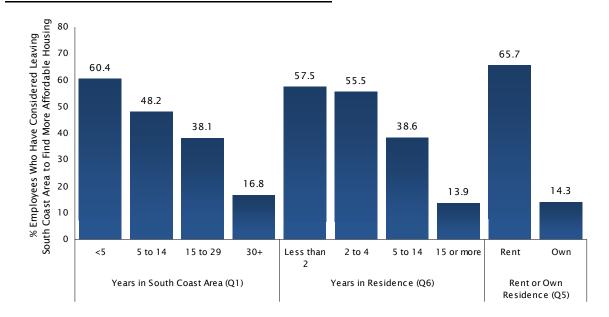
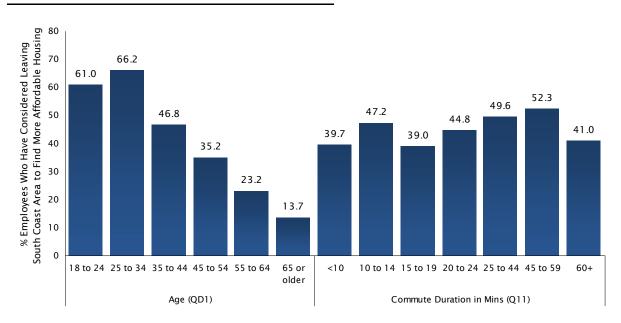


FIGURE 99 HOME AND COMMUTE STATUS WITH CONSIDERED LEAVING SOUTH COAST AREA BY AGE & COMMUTE DURATION IN MINS



67

FIGURE 100 HOME AND COMMUTE STATUS WITH CONSIDERED LEAVING SOUTH COAST AREA BY HSLD INCOME & TYPE OF RESIDENCE

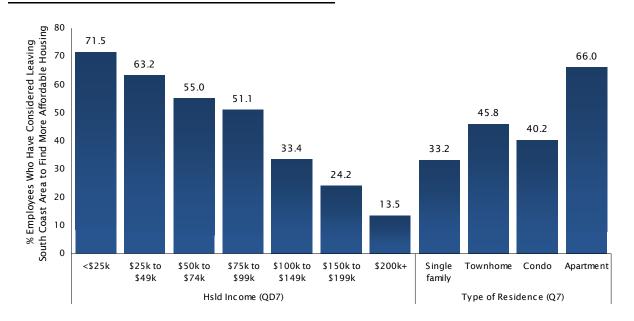
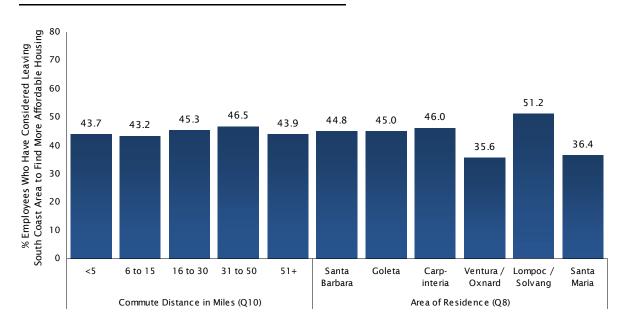


FIGURE 101 HOME AND COMMUTE STATUS WITH CONSIDERED LEAVING SOUTH COAST AREA BY COMMUTE DISTANCE IN MILES & AREA OF RESIDENCE



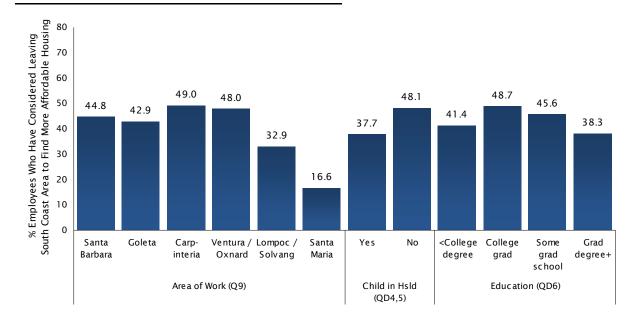


FIGURE 102 HOME AND COMMUTE STATUS WITH CONSIDERED LEAVING SOUTH COAST AREA BY AREA OF WORK, CHILD IN HSLD & EDUCATION



AFFORDABLE HOUSING OPTIONS

In addition to profiling the housing *problem* in the South Coast and the extent that its impacts are felt by South Coast businesses and employees alike, the study also explored potential *solutions* that would help mitigate the jobs/housing imbalance in the region. In the Employee Survey, this took the form of presenting respondents with several workforce housing options that could be built in the South Coast, gauging their interest in renting and/or purchasing each option, as well as determining their ability to afford the solution.

SINGLE FAMILY HOME, 1800 SQUARE FEET

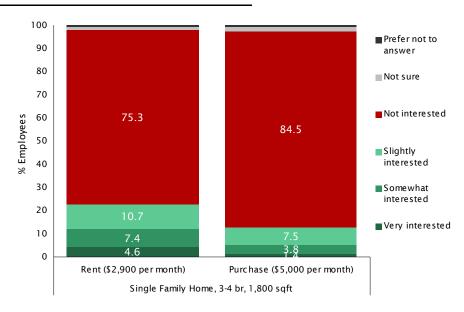


The first residence tested (shown above) was described as an 1800 square foot, single family home with three to four bedrooms priced at \$800,000. If it were available within a 25-minute commute of their current employer, approximately 13% of South Coast employees indicated they would be interested in purchasing the home if the combined monthly mortgage and property tax bill were \$5,000 per month. Approximately 1% indicated they would be *very* interested in purchasing the home (see Figure 103).

The percentage of South Coast employees interested in renting the same house at a rate of \$2900 per month was somewhat greater (23%), with approximately 5% indicating that they were *very* interested in renting the property at this rate. Figures 104-110 show how interest in renting and purchasing this single family residence varied across subgroups of South Coast employees. Like all other figures presented in this section, these figures are based on *all* South Coast employees including those already satisfied with their current housing situation.

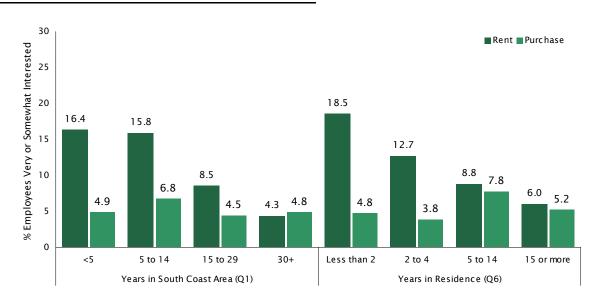
Affordable Housing Options

Question 22a/22b A.If it were located within a 25-minute drive of your current employer, how interested would you be in renting this home on the South Coast if the monthly rent were \$2900? B. If it were located within a 25-minute drive of your current employer, how interested would you be in purchasing this home on the South Coast if the combined monthly mortgage and property tax bill were \$5000?









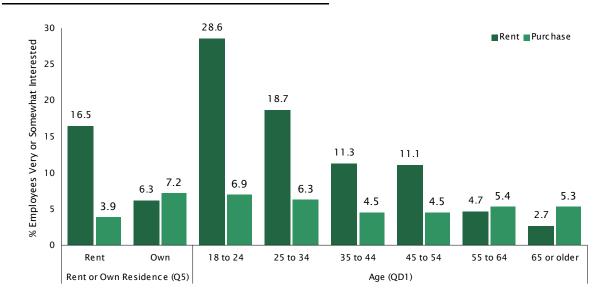
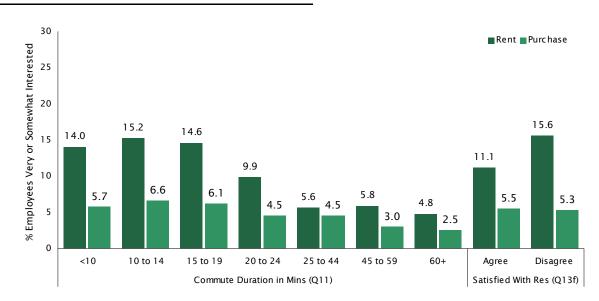


FIGURE 105 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY RENT OR OWN RESIDENCE & AGE

FIGURE 106 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY COMMUTE DURATION IN MINS & SATISFIED WITH RES



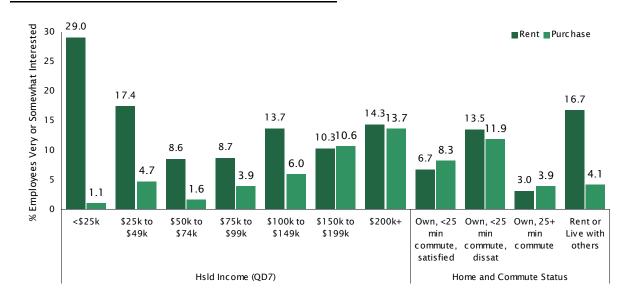
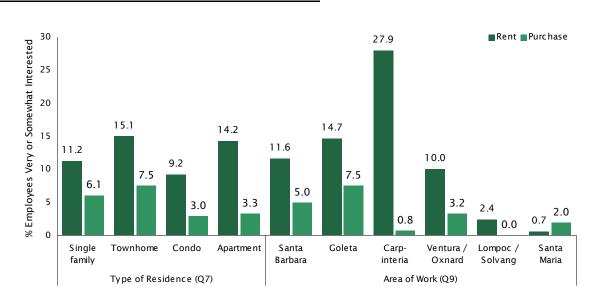


FIGURE 107 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY HSLD INCOME & HOME AND COMMUTE STATUS

FIGURE 108 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY TYPE OF RESIDENCE & AREA OF WORK



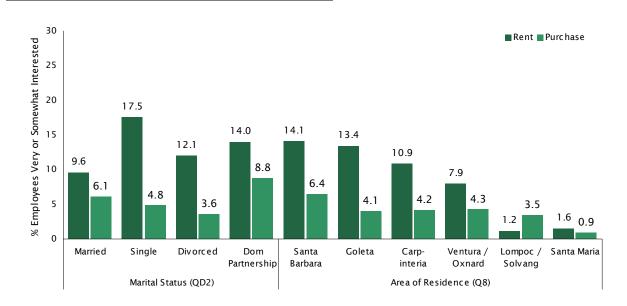
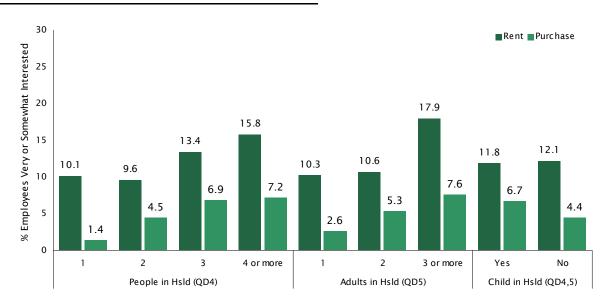


FIGURE 109 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY MARITAL STATUS & AREA OF RESIDENCE

FIGURE 110 INTEREST IN RENTING OR PURCHASING SINGLE FAMILY HOME, 3-4 BR, 1,800 SQFT BY PEOPLE IN HSLD, ADULTS IN HSLD & CHILD IN HSLD



TOWNHOME, 1450 SQUARE FEET



The next residence tested (shown above) was described as a 1450 square foot townhome with two to three bedrooms priced at \$600,000. If it were available within a 25-minute commute of their current employer, approximately 25% of South Coast employees indicated they would be interested in purchasing the home if the combined monthly mortgage and property tax bill were \$3900, with 4% stating they would be *very* interested (see Figure 111 on the next page).

The percentage of South Coast employees interested in renting the same townhome at a rate of \$2750 per month was slightly greater (28%), with approximately 5% indicating that they were *very* interested in renting the property at this rate. Figures 112-118 show how interest in renting and purchasing this townhome residence varied across subgroups of South Coast employees.

Affordable Housing Options

Question 23a/23b A. If it were located within a 25-minute drive of your current employer, how interested would you be in renting this home on the South Coast if the monthly rent were \$2750? B. If it were located within a 25-minute drive of your current employer, how interested would you be in purchasing this home on the South Coast if the combined monthly mortgage and property tax bill were \$3900?

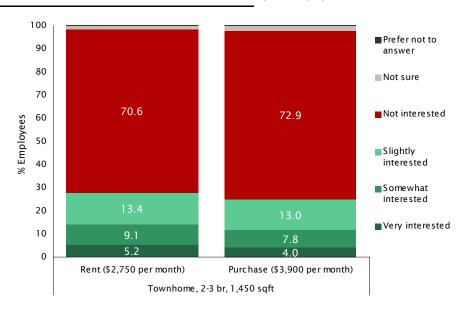
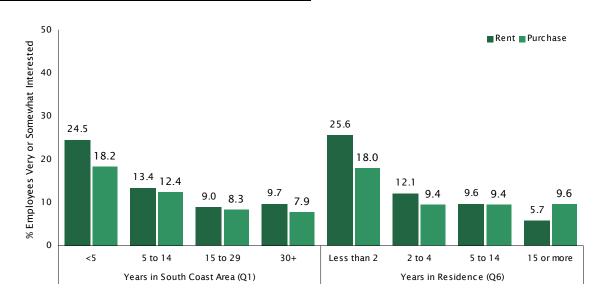




FIGURE 112 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY YEARS IN SOUTH COAST AREA & YEARS IN RESIDENCE



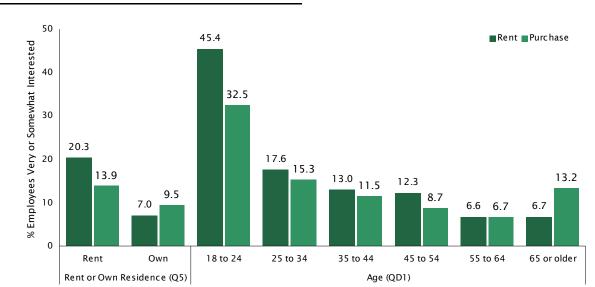
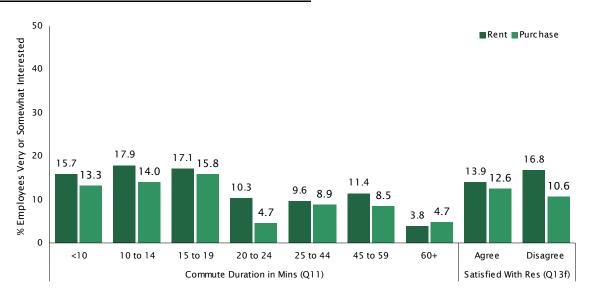


FIGURE 113 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY RENT OR OWN RESIDENCE & AGE





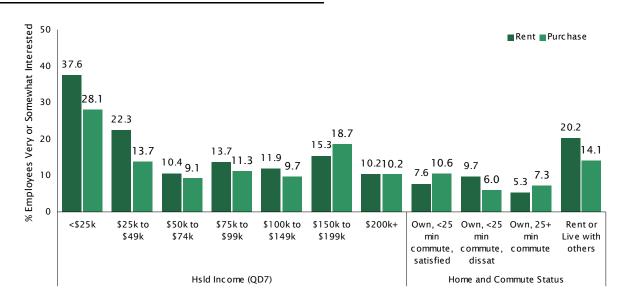
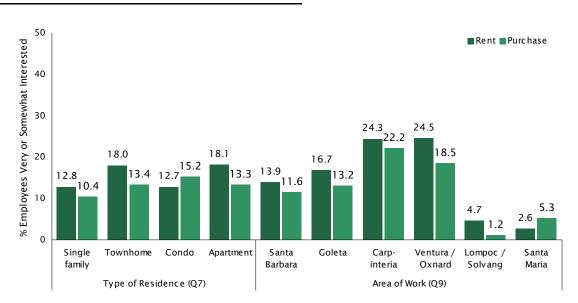


FIGURE 115 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY HSLD INCOME & HOME AND COMMUTE STATUS

FIGURE 116 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY TYPE OF RESIDENCE & AREA OF WORK



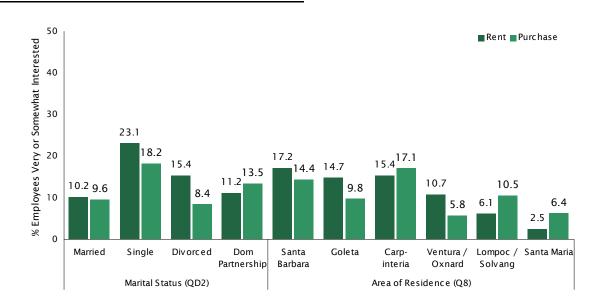
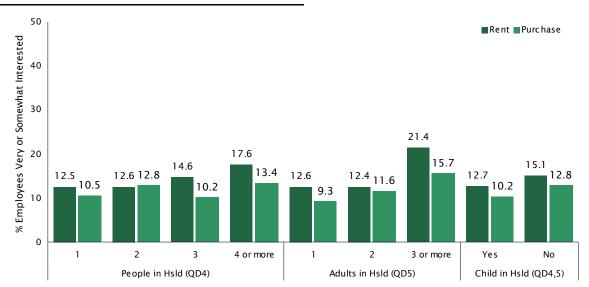


FIGURE 117 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY MARITAL STATUS & AREA OF RESIDENCE

FIGURE 118 INTEREST IN RENTING OR PURCHASING TOWNHOME, 2-3 BR, 1,450 SQFT BY PEOPLE IN HSLD, ADULTS IN HSLD & CHILD IN HSLD



CONDOMINIUM, 800 SQUARE FEET



The next residence tested (shown above) was described as a 905 square foot condominium with two bedrooms priced at \$500,000. If it were available within a 25-minute commute of their current employer, approximately 21% of South Coast employees indicated they would be interested in purchasing the home if the combined monthly mortgage and property tax bill were \$3,200, with 2% stating they would be *very* interested (see Figure 119 on the next page).

The percentage of South Coast employees interested in renting the condominium at a rate of \$2,228 per month was similar (22%), with approximately 4% indicating that they were *very* interested in renting the property at this rate. Figures 120-126 show how interest in renting and purchasing this condominium residence varied across subgroups of South Coast employees.

Affordable Housing Options

Question 24a/24b A. If it were located within a 25-minute drive of your current employer, how interested would you be in renting this home on the South Coast if the monthly rent were \$2228? B. If it were located within a 25-minute drive of your current employer, how interested would you be in purchasing this home on the South Coast if the combined monthly mortgage and property tax bill were \$3200?

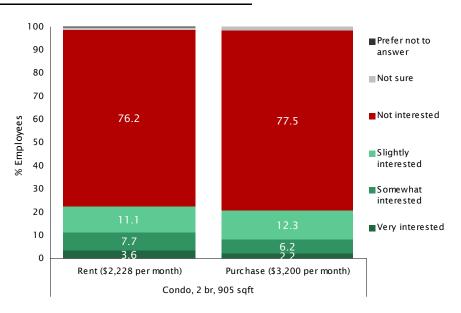
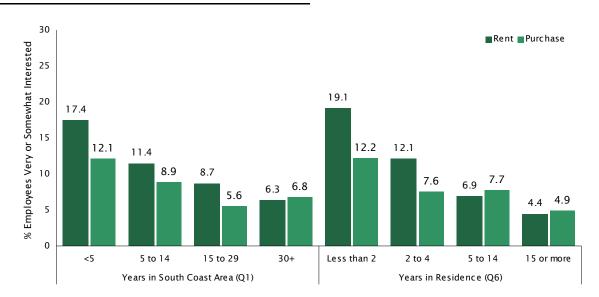




FIGURE 120 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY YEARS IN SOUTH COAST AREA & YEARS IN RESIDENCE



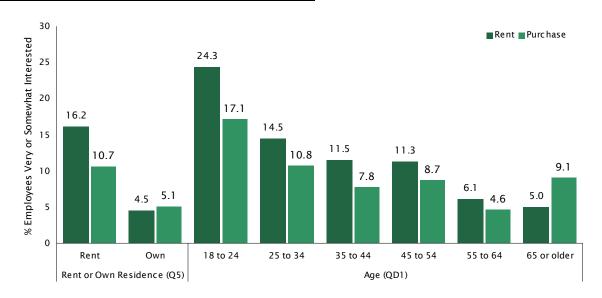
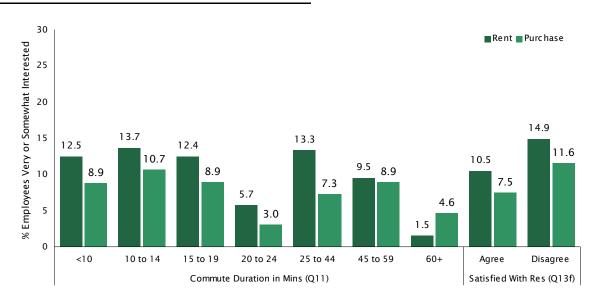


FIGURE 121 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY RENT OR OWN RESIDENCE & AGE

FIGURE 122 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY COMMUTE DURATION IN MINS & SATISFIED WITH RES



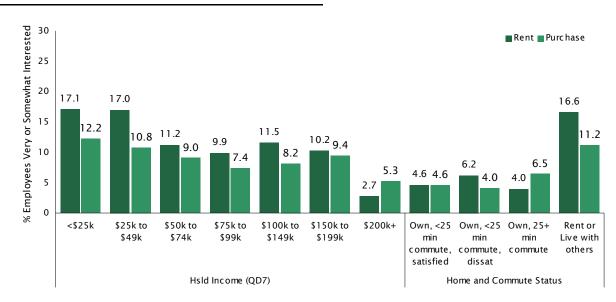
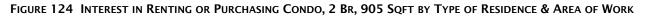
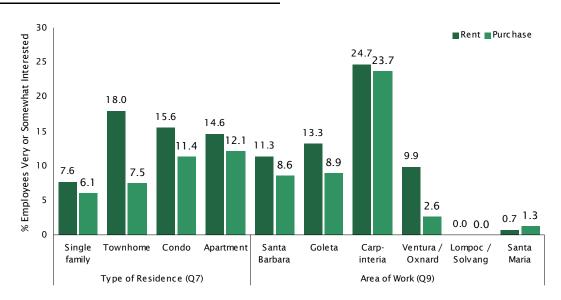


FIGURE 123 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY HSLD INCOME & HOME AND COMMUTE STATUS





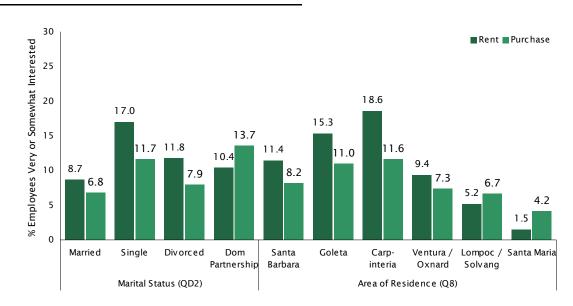
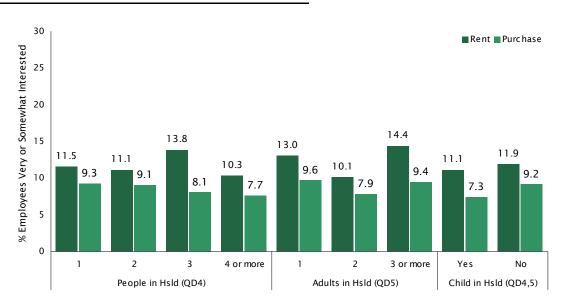


FIGURE 125 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY MARITAL STATUS & AREA OF RESIDENCE

FIGURE 126 INTEREST IN RENTING OR PURCHASING CONDO, 2 BR, 905 SQFT BY PEOPLE IN HSLD, ADULTS IN HSLD & CHILD IN HSLD



CONDOMINIUM, 675 SQUARE FEET



The final residence tested (shown above) was described as a 675 square foot condominium with one bedroom, and was presented as a rental-only option at \$1,710 monthly. If it were available within a 25-minute commute of their current employer, one-in-five South Coast employees (20%) indicated they would be interested in renting the condominium as described, with 3% stating that they would be *very* interested in renting this type of property.

Question 25 If it were located within a 25-minute drive of your current employer, how interested would you be in renting this home on the South Coast if the monthly rent were \$1710?

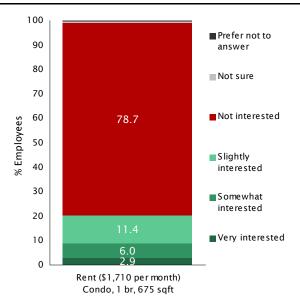


FIGURE 127 INTEREST IN RENTING CONDO, 1 BEDROOM, 675 SQFT

Figures 128-134 beginning on the next page show how interest in renting the one-bedroom condominium described in Question 25 varied across subgroups of South Coast employees.

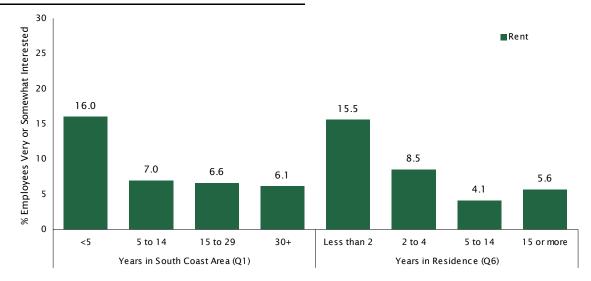
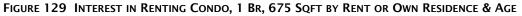
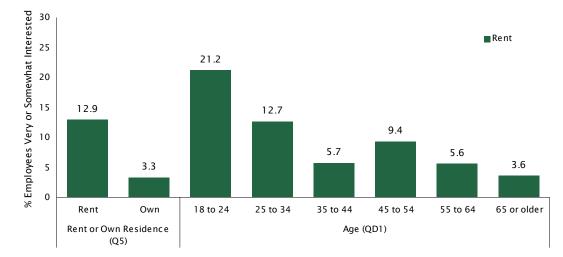


FIGURE 128 INTEREST IN RENTING CONDO, 1 BR, 675 SQFT BY YEARS IN SOUTH COAST AREA & YEARS IN RESIDENCE





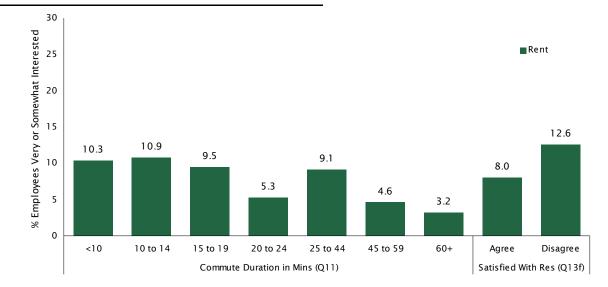


FIGURE 130 INTEREST IN RENTING CONDO, 1 BR, 675 SQFT BY COMMUTE DURATION IN MINS & SATISFIED WITH RES

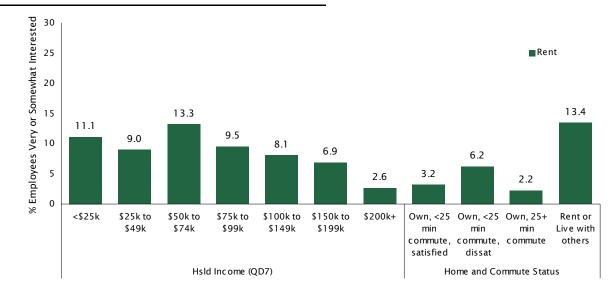
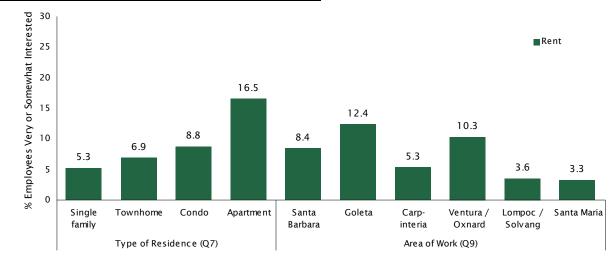
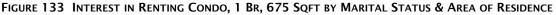
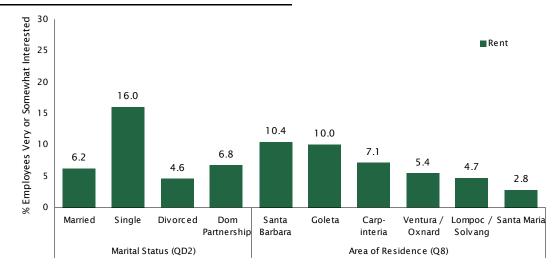


FIGURE 131 INTEREST IN RENTING CONDO, 1 BR, 675 SQFT BY HSLD INCOME & HOME AND COMMUTE STATUS

FIGURE 132 INTEREST IN RENTING CONDO, 1 BR, 675 SQFT BY TYPE OF RESIDENCE & AREA OF WORK







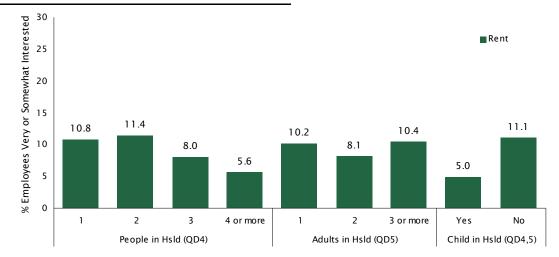


FIGURE 134 INTEREST IN RENTING CONDO, 1 BR, 675 SQFT BY PEOPLE IN HSLD, ADULTS IN HSLD & CHILD IN HSLD

ABILITY TO PURCHASE AFFORDABLE TOWNHOME OPTION The second affordable housing option presented to respondents (see *Townhome, 1450 Square Feet* on page 70) was offered at \$600,000 and would require a combined mortgage bill and property tax payment of \$3,900 per month. In today's mortgage market, it would also likely require a 10% down payment of \$60,000 to purchase the home. Although not all employees were interested in purchasing this particular housing solution, Questions 26 and 27 sought to identify whether they could *afford* to do so.

Question 26 Thinking of your present financial position, could you afford a combined mortgage and property tax bill of \$3,900 per month?

Question 27 Thinking of your present financial position, could you afford a down payment of \$60,000 to purchase a home? This is based on a down payment of 10% on a \$600,000 home.

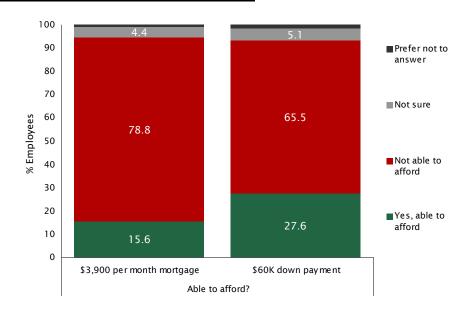


FIGURE 135 ABLE TO AFFORD \$3,900 PER MONTH & \$60K DOWN PAYMENT

In their current financial position, just over one-quarter of South Coast employees (28%) indicated they could afford a down payment of \$60,000 to purchase a home (see Figure 135). The monthly payment of \$3,900, however, was a bigger barrier. Less than 16% of South Coast employees indicated they could afford to pay \$3,900 per month for a combined mortgage and property tax payment. Although not shown in the figure, approximately 11% of South Coast employees indicated they could afford *both* conditions for purchase: a down payment of \$60,000 and a combined mortgage and property tax payment of \$3,900 monthly. Figures 136-139 display the percentage of South Coast employees (by subgroup) that could meet each condition.

Figure 136 Able to Afford \$3,900 per Month & \$60K Down Payment by Rent or Own Residence, Age & Satisfied With Res

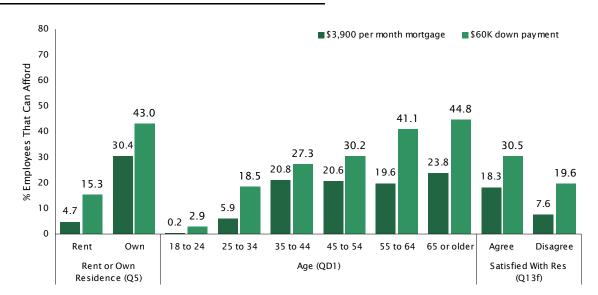
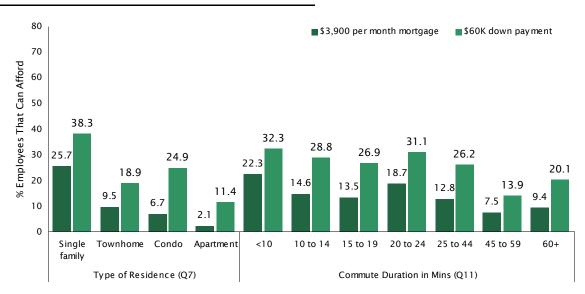


FIGURE 137 ABLE TO AFFORD \$3,900 PER MONTH & \$60K DOWN PAYMENT BY TYPE OF RESIDENCE & COMMUTE DURATION IN MINS





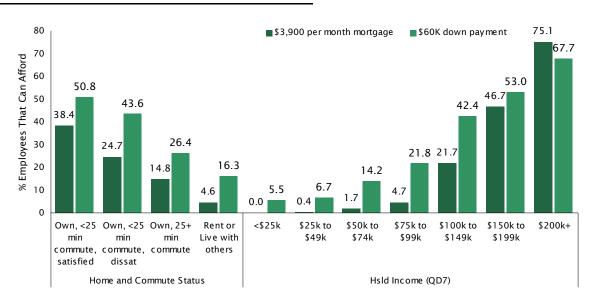
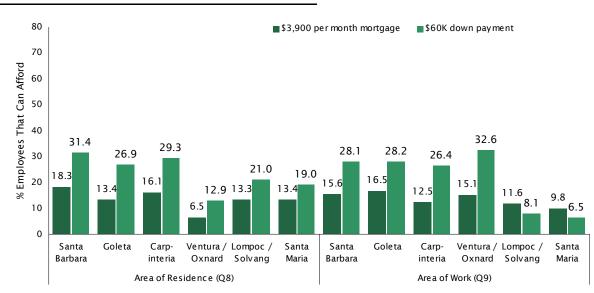


FIGURE 138 ABLE TO AFFORD \$3,900 PER MONTH & \$60K DOWN PAYMENT BY HOME AND COMMUTE STATUS & HSLD INCOME

FIGURE 139 ABLE TO AFFORD \$3,900 PER MONTH & \$60K DOWN PAYMENT BY AREA OF RESIDENCE & AREA OF WORK



BACKGROUND & DEMOGRAPHICS

For the interested reader, Table 5 presented addition background information collected from organizations that participated in the Employer Survey, whereas Table 6 on the next page presents demographic information collected from South Coast employees who participated in the Employee Survey.

TABLE 5	BACKGROUND	INFORMATION FOR	EMPLOYER SAMPLE
---------	------------	------------------------	-----------------

Total Respondents	126
Years in South Coast Area (Q1)	
Less than 5	20.6
5 to 14	20.6
15 or more	57.9
Refused	0.8
Overall Business Climate Rating (Q2)	
Excellent, good	53.2
Fair, poor, very poor	42.9
Refused	4.0
Employee Recruit Area (Q9)	
Only South Coast	34.9
South Coast and beyond	59.5
Refused	5.6
Number of Employees at South Coast Worksite (Q19)	
Less than 5	16.7
5 to 9	14.3
10 to 24	22.2
25 to 74	16.7
75 or more	18.3
Refused	11.9
Invite to Participate on Survey (Q23)	
Yes	47.6
No, not sure	46.8
Refused	5.6
Notable/VIP Employers	
Yes	20.6
No	79.4

87

TABLE 6 DEMOGRAPHICS OF EMPLOYEE SAMPLE

Total Respondents	2,912
QD1 Age	
18 to 24	4.7
25 to 34	26.2
35 to 44	18.4
45 to 54	19.8
55 to 64	19.0
65 or older	2.9
Prefer not to answer	9.0
QD2 Marital status	
Married	52.9
Single	30.5
Divor ced	8.8
Widow / Widower	1.5
Domestic partnership	3.9
Prefer not to answer	2.4
QD3 Spouse / Sig Other Work	
Yes, full time	38.6
Yes, part time	9.2
No, doesn't work	7.9
No sig other	40.8
Prefer not to answer	3.5
QD4 People in hsld	
1	15.8
2	35.9
3	20.6
4 or more	24.5
Prefer not to answer	3.1
QD5 Adults in hsld	
1	20.3
2	56.3
3 or more	19.9
Prefer not to answer	3.4
QD6 Education	
Elementary	0.0
Some high school	0.1
High school graduate	2.3
Technical / Vocational	2.1
Some college	16.5
College graduate	43.9
Some graduate school	6.4
Graduate, professional, doctorate degree	27.5
Not sure	0.0
Prefer not to answer	1.3
QD7 Household annual income	1
Less than \$25k	1.8
\$25k to \$49k	16.6
\$50k to \$74k	20.3
\$75k to \$99k	16.2
\$100k to \$149k	21.3
\$150k to \$199k	7.9
\$200k or more	6.0
Not sure	1.9 8.1

METHODOLOGY

The following sections outline the methodologies used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the Coastal Housing Coalition to develop questionnaires that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking items in a set order can lead to a systematic position bias in responses, the items were asked in random order for each respondent.

Some of the questions asked in this study were presented only to a subset of respondents. For example, only employers who indicated that a lack of affordable housing and/or the cost of housing on the South Coast negatively impacts their business (Question 12) were subsequently asked to describe the specific ways in which their business is negatively impacted (Question 13). The questionnaires included with this report (see *Questionnaires & Toplines* on page 90) identify the skip patterns that were used in the surveys to ensure that each respondent received the appropriate questions.

PROGRAMMING & TESTING Prior to fielding the surveys, the questionnaires were programmed to operate online and be accessed by a web browser. The online survey automatically navigated skip patterns, randomized appropriate question items, and alerted the respondent to certain types of keypunching mistakes should they occur. The integrity of the programming and skip patterns was pre-tested internally by True North prior to fielding. True North and the Coastal Housing Coalition also pre-tested the invitation emails and hyperlinks prior to launch.

SAMPLE, RECRUITING & DATA COLLECTION In Phase 1, South Coast employers were recruited from a database of 2747 employers using a combination of mailed and emailed invitations. Employers with a viable email address were sent email invitations with a hyperlink that would take them directly to the online survey. Each hyperlink contained a unique embedded passcode, which ensured that only South Coast employers who were sent an invitation could participate and ensured that those who did choose to participate could complete the survey just one time. Similarly, approximately 500 employers that lacked a viable email address on the database were sent a mailed invitation that briefly explained the purpose of the survey and provided a URL and their specific passcode to use when entering the site. Targeted phone calls were also used, as needed, to encourage participation and complete interviews. A total of 126 South Coast employers completed the Phase 1 survey during the data collection period which spanned from May 28 to August 19, 2014.

From the list of 126 organizations that completed the Phase 1 survey, 41 agreed to participate in the Phase 2 survey which involved inviting their employees to take a survey that focused on their current housing situation, commute patterns, the types of trade-offs they perceive they are currently making with respect to their job/housing situation, and related issues. Each company was provided a unique invitation email and URL to pass through to their employees. During the data

collection period which lasted from September 22 to November 21, 2014, a total of 2,912 employees completed the Phase 2 survey.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and crosstabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

QUESTIONNAIRES & TOPLINES

PHASE 1: EMPLOYER SURVEY

No.	RUENORTH Research	Employer S Final Toplines (126 respon August
Sectio	n 1: Welcome Page	
Coast uninco CONFI	area, which includes the cities of Sant	survey of employers in Santa Barbara's South a Barbara, Goleta and Carpinteria, as well as bur individual responses will be kept strictly
During) the survey, please do not use your b	rowser's 'Forward' and 'Back' buttons. To move ' buttons at the bottom of each page.
When	you have finished the survey click the	'Done' button to submit your survey.
To see	the survey most clearly, MAXIMIZE th	is browser screen.
	rt the survey, please enter in the box you received and then push the 'begir	below the password that was provided in the 1' button.
Sectio	n 2: Perceptions of South Coast Busine	ess Climate
	st set of questions in the survey focu Coast area.	s on what it is like to conduct business in the
Q1 1	o begin, how long has your business	operated in the South Coast area?
	1 Less than 5 years	21%
_	 Less than 5 years 5 years to less than 10 years 	21% 12%
	···· · · · · · · · · · · · · · · · · ·	
_	2 5 years to less than 10 years	12%
	2 5 years to less than 10 years 3 10 years to less than 15 years	12% 9%
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 	12% 9% 58% 1%
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 9 Not Sure/ Prefer not to answer 	12% 9% 58% 1%
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 9 Not Sure/ Prefer not to answer Overall, how would you rate the busine 	12% 9% 58% 1% ess climate in the South Coast area?
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 99 Not Sure/ Prefer not to answer Overall, how would you rate the busine 1 Excellent 	12% 9% 58% 1% ess climate in the South Coast area? 8%
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 69 Not Sure/ Prefer not to answer 60 Overall, how would you rate the busine 1 Excellent 2 Good 	12% 9% 58% 1% ess climate in the South Coast area? 8% 45%
	 2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 9 Not Sure/ Prefer not to answer Overall, how would you rate the busine 1 Excellent 2 Good 3 Fair 	12% 9% 58% 1% ess climate in the South Coast area? 8% 45% 36%
Q2 (2 5 years to less than 10 years 3 10 years to less than 15 years 4 15 or more years 69 Not Sure/ Prefer not to answer 60 Overall, how would you rate the busine 1 Excellent 2 Good 3 Fair 4 Poor 	12% 9% 58% 1% ess climate in the South Coast area? 8% 45% 36% 5%

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Page 1

90

August 2014

	1	Yes	67%	Ask Q4	
	2	No	17%	Skip to Q5	
	3	Not sure	13%	Skip to Q5	
	99	Prefer not to answer	2%	Skip to Q5	
Q4	busi	se briefly describe the aspects or features ness. <i>Please type your response in the text</i> grouped into categories shown below			
	Desi	rable place to live		25%	
	Clim	ate, weather		25%	
	Dem	ographics of residents		25%	
	Tou	rism		13%	
	Hou	sing value, real estate	13%		
	Loca	tion, access to surrounding areas	11%		
	Loca	l industries, business environment	10%		
	Univ	ersities, colleges	8%		
	Philanthropic, non-profit community		6%		
	Geog	graphy, beaches mountains	5%		
	Cult	ure, arts	5%		
	Sens	e of community	5%		
	Not	sure	4%		
	Prefe	er not to answer		2%	
Q5	Are area	there any particular challenges associated ?	with doing busine	ss in the South Coast	
	1	Yes	87%	Ask Q6	
	2	No	7%	Skip to Q7	
	3	Not sure	3%	Skip to Q7	
	99	Prefer not to answer	2%	Skip to Q7	

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Page 2

August 2014

Q6	Please briefly describe the particular challenges South Coast. <i>Please type your response in the t</i> and grouped into categories shown below.	
	Cost, availability of real estate	37%
	Cost of living in general	34%
	Available workforce, workforce limited by COL	29%
	Government fees, taxes, regulations	22%
	Parking, traffic	5%
	Prefer not to answer	5%
	Not sure	3%

Sect	ion 3:	Attracting & Retaining Employees	
Q7		eneral, how easy or difficult is it to hire an ness in the South Coast area?	d retain quality employees to work at your
	1	Very easy	4%
	2	Somewhat easy	25%
	3	Somewhat difficult	48%
	4	Very difficult	1 4%
	97	Doesn't apply	9%
	98	Not Sure	0%
	99	Prefer not to answer	1%
Q8	emp	t would you say are the biggest barriers or loyees to work at your business? <i>Please ty</i> atim responses recorded and grouped into cate	
	Avai	lability, cost of housing	34%
	Cost	of living in general	33%
	Abili	ity to offer competitive salaries, benefits	21%
	Lack	of qualified workers	1 9%
	Com	muting, transportation	9%
	Not	sure	8%
	Com	petition from other local businesses	3%
	Prefe	er not to answer	3%
	High	n taxes, fees	2%
	No b	parriers	2%

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August 2014

	Dee		ماييم ماير انبرم نيم فامم	South Coost area or	
Q9		s your business only recruit employees who ou also recruit employees from outside of		South Coast area, or	
	1	Only recruit employees who already live in the South Coast	35%	Ask Q10	
	2	Recruit employees from outside the South Coast as well as local residents	60%	Skip to Q11	
	3	Not sure	4%	Skip to Q12	
	99	Prefer not to answer	2%	Skip to Q12	
Q10	the S	ere a particular reason your business does South Coast area? <i>Please type your respons</i> rded and grouped into categories shown below.			
	No r	need, local workforce is sufficient		36%	
	Emp	loyee relocation too expensive		34%	
	Only	offer part-time, seasonal jobs		11%	
	Not	sure		11%	
	Com	imuting, transportation		9%	
	Cost	of living in general		7%	
Q11	of th	t are the biggest barriers or challenges to h ne South Coast to come work for your busir box below. Verbatim responses recorded and g	ness? Please type y	our response in the	
	Avai	lability, cost of housing		38%	
	Cost	of living in general	34%		
	Com	imuting, transportation	25%		
	Not	sure	10%		
	Relo	cation expense		7%	
	Abili	ty to offer competitive salaries, benefits		7%	
	Lack	of qualified workers		3%	
	Lack	of career opportunities		3%	

Section 4: Housing

Next are several questions about housing in the South Coast area and how it may affect your business.

Q12	Does a lack of available housing and/or the cost of housing in the South Coast area negatively impact your business in any way?					
	1	Yes	82%	Ask Q13		
	2	No	8%	Skip to Q14		
	3	Not sure	10%	Skip to Q14		
	99	Prefer not to answer	1%	Skip to Q14		

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August 2014

	Difficulty recruiting, retaining qualified employees				26%			
	General negative impact	16%						
	Negatively impacts employees, reduces	11%						
	quality of life, morale Increased salaries, wages to remain	11%						
	competitive	1 0%						
	Need for employees to live outside area, can't 8% 8%							
	Lack of extra money from customers, lack of customers in general Biz is in real estate industry, negatively	8%						
	affected on many level	7%						
	Prefer not to answer				7%			
	Increased cost of goods, services for customers, driving prices higher				5%			
	Not sure	3%						
	South Coast area affects your business in the fi		<i>,</i>			ot cable	bure	not to
	South Coast area affects your business in the fo	Yes, A Lot	Yes, Somewhat		No Impact	Not applicable	Not Sure	Prefer not to
	South Coast area affects your business in the fi		<i>,</i>	′s.		Not applicable	Not Sure	
Ran	domize	Yes, A Lot	Yes, Somewhat	Yes, a Little	No Impact		_	29
Ran A	domize Reduces your company's profitability	Yes, A Lot 12%	Somewhat Somewhat	vs. Aes, a Little 17%	No Impact %02	16%	6%	29 19
Ran A B	Sour Coast area anects your business in the indomize domize Increases the wages you must pay employees Increases the distances your employees commute to work Causes your business to outsource certain tasks or projects	Aes, A Lot 17% 21%	, Kes, Somewhat 22% 33%	rs. Little 17%	No Impact 802 802	16%	6% 3%	29 19 29
Ran A B C	domize Reduces your company's profitability Increases the wages you must pay employees Increases the distances your employees commute to work Causes your business to outsource certain tasks or projects Makes it difficult to retain employees who want to purchase a home	Les' A Lot 17% 21% 37%	, tes, 22% 33% 25%	rs.	No Impact 90 20% 12%	16% 10% 8%	6% 3% 0%	29 19 29 19
Ran A B C D	domize Reduces your company's profitability Increases the wages you must pay employees Increases the distances your employees commute to work Causes your business to outsource certain tasks or projects Makes it difficult to retain employees who	17% 21% 37%	200 Kes, som Kes, 22% 25% 25% 25% 26% 26% 26% 26% 26% 26% 26% 26% 26% 26	rs. I 17% I 29% I 3%	Unit of the second seco	16% 10% 8% 20%	6% 3% 0% 6%	29 19 29 19 19
Ran A B C D E	domize Reduces your company's profitability Increases the wages you must pay employees Increases the distances your employees commute to work Causes your business to outsource certain tasks or projects Makes it difficult to retain employees who want to purchase a home Makes it difficult to retain employees who want to rent a quality home, apartment or	ton V (1978) 17% 21% 37% 10% 48%	22% 33% 25% 16% 23%	rs. 117% 19% 13% 8%	20% 12% 12% 35% 9%	16% 10% 8% 20% 10%	6% 3% 0% 6% 2%	29 19 29 19 19 19
Ran A B C D E F	South Coast area anects your business in the indext of	17% 21% 37% 10% 48% 39%	22% 33% 25% 16% 23% 32%	rs. I 7% 17% 19% 17% 13% 8% 8%	20% 12% 12% 35% 9% 10%	16% 10% 8% 20% 10% 7%	6% 3% 0% 6% 2% 3%	299 199 299 199 199 199
A B C D E F G	domize Reduces your company's profitability Increases the wages you must pay employees Increases the distances your employees commute to work Causes your business to outsource certain tasks or projects Makes it difficult to retain employees who want to purchase a home Makes it difficult to retain employees who want to rent a quality home, apartment or condo Reduces employee morale Makes it difficult to attract employees from	toj k 37% 21% 37% 10% 48% 39% 19%	22% 33% 25% 16% 23% 32% 27%	rs. approximate and a second	United States of the states of	16% 10% 8% 20% 10% 7% 8%	6% 3% 0% 6% 2% 3% 10%	01 Jan 200 199 199 199 199 199 199 199 1

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August 2014

	1	Yes	10)%	Ask Q16			
	2	No	74	1%	Skip to Q17 Skip to Q17			
	3	Not sure	15	5%				
	99	Prefer not to answer	1	%	Skip to Q	17		
Q16 Is the cost of housing and/or lack of available housing in the South Coast area on the main reasons why your business may move out of the area?								
	1 Yes 77%							
	2 No 15%							
	3	Not sure		8	3%			
	99	Prefer not to answer		()%			
Q17		se indicate whether your business currently loyees.	/ offers the	following	benefits to	I		
Rand	domiz	re	Yes	No	Not Sure	Prefer not to answer		
А	Free	or discounted transit passes	16%	81%	2%	2%		
В	Emp	loyer-provided housing	5%	91%	2%	2%		
	Subs	sidized housing loans	2%	94%	2%	2%		
С	Sube	sidies for rental housing	2%	94%	2%	2%		
C D	Subs							

	to help offset the cost of employee housing?						
Ran	domize	Definitely Yes	Probably Yes	Probably No	Definitely No	Not Sure	Prefer not to answer
А	Free or discounted transit passes	1%	20%	28%	33%	13%	5%
В	Employer-provided housing	0%	2%	28%	60%	6%	4%
С	Subsidized housing loans	0%	2%	28%	57%	9%	4%
D	Subsidies for rental housing	0%	3%	26%	55%	12%	4%

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Section 6: Background

Thank you so much for your participation – this final section of questions collects background information for statistical purposes.

Q19	In total, how many people are currently employed at your worksite(s) in the South Coast? Number of employees recorded and later grouped into categories shown below.		
	Less than 5	17%	
	5 to 9	14%	
	10 to 24	22%	
	25 to 74	17%	
	75 or more	18%	
	Not sure	5%	
	Prefer not to answer	7%	
Q20	Below are shown six salary categories. Please indicate the percentage of employees at your worksite(s) in the South Coast that are in each salary/compensation bracket. Percentages shown below are averages among those who provided responses to this question (75% of all respondents).		
	Less than \$25,000 per year	22%	
	\$25,000 to \$49,999 per year	32%	
	\$50,000 to \$74,999 per year	21%	
	\$75,000 to \$99,999 per year	11%	
	\$100,000 to \$149,999 per year	9%	
	\$150,000 or more per year	5%	
Q21	Of the <insert #="" from="" q19="">, approximately how many positions require a college degree? Percentage shown below is the average among those who provided a response to this question (65% of all respondents).</insert>		
	Average % of positions that require college degree	52%	
Q22	Below are shown four age categories. Please indicate the percentage of employees at		
	25 years or younger	15%	
	26 to 40 years	41%	
	41 to 55 years	27%	
	56 years or older	18%	

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Page 7

survey.

August 2014

 Q23
 In a few weeks, the Coastal Housing Coalition is planning to conduct an online survey of employees who work for local businesses. The survey will be short and will focus on employees' housing and commute experiences.

 Where the survey is ready, would your company be willing to forward an email to your employees that invited them to participate in the survey?

 1
 Yes
 48%

 2
 No
 29%

 98
 Not sure
 18%

 99
 Prefer not to answer
 6%

 Thank you for sharing your opinions with us! Please click the button below to submit your

Post-Interview & Sample Items				
S 1	Notables / VIP Employers			
	1	Yes	21%	
	0	No	79%	

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PHASE 2: EMPLOYEE SURVEY

-		JENCRTH ESEARCH	Fir	Coastal Housing Coali Employee Su nal Toplines (2,912 Employ		
Sec	tion 1	: Introduction to Study		December 2		
Coa unir <u>CON</u> Sur Duri	st area corpo IFIDEN vey In ing th	to the Coastal Housing Coalition's survey a, which includes the cities of Santa Barba orated areas of the South Coast. Your indiv NTIAL. Instructions: e survey, please do not use your browser' he survey, use the 'Next' button at the bot	ira, Goleta and Carj vidual responses w s 'Forward' and 'Bac	pinteria, as well as ill be kept strictly ck' buttons. To move		
Whe	n you	have finished the survey click the 'Done'	button to submit y	our survey.		
Tos	ee the	e survey most clearly, MAXIMIZE this brow	vser screen.			
Sec	tion 2	: Current Employment				
The	first s	set of questions in the survey focus on you	ur current employn	nent situation.		
	1	· · ·				
Q1	To b	egin, how long have you been employed	in the South Coast	area?		
	1	Less than 2 years		12%		
	2	2 years to less than 5 years		14%		
	3	5 years to less than 10 years		15%		
	4	10 years to less than 15 years		16%		
	5	15 years to less than 20 years		11%		
	6	20 years to less than 30 years		16%		
	7	30 or more years		15%		
	99	Not sure / Prefer not to answer		0%		
Q2	Are	you currently employed full-time or part-t	ime?			
	1	Full-time		90%		
	2	Part-time		9%		
	99	Not sure / Prefer not to answer		0%		
	Does your current position require a four-year college degree?					
Q3	Doe		58%	Ask Q4		
Q3	Doe:	Yes	/ -			
Q3		Yes No	35%	Skip to Q5		
Q3	1			Skip to Q5 Skip to Q5		

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Q4	Does your current position require a graduate degree such as an MBA, M.A., M.S, JD or Ph.D.?					
	1	Yes	27%			
	2	No	71%			
	99	Not sure / Prefer not to answer	3%			

Section 3: Current Housing & Commute Situation

The next set of questions in the survey focus on your current housing situation and commute.

Q5	5 Do you rent or own your current residence?			
	1	Rent	53%	
	2	Own	43%	
	3	Live rent free at home owned by someone else	4%	
	99	Prefer not to answer	0%	
Q6	How	long have you lived in your current reside	ence?	
	1	Less than 2 years	31%	
	2	2 years to less than 5 years	23%	
	3	5 years to less than 10 years	15%	
	4	10 years to less than 15 years	12%	
	5	15 years to less than 20 years	7%	
	6	20 years to less than 30 years	9%	
	7	30 or more years	2%	
	99	Not sure / Prefer not to answer	0%	
Q7	Whie	ch of the following best describes your <u>cu</u>	<u>rrent</u> residence?	
	1	Detached, single-family home	53%	
	2	Townhome	9%	
	3	Condominium	1 0%	
	4	Apartment	26%	
	5	Mobile home	2%	
	99	Prefer not to answer	1%	

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Q8	What is the Zip Code of your current residence grouped into categories shown below.	? Verbatim responses	recorded and later				
	Santa Barbara	5	2%				
	Goleta	24	4%				
	Carpinteria / Summerland / Ojai	4	!%				
	Ventura	4	!%				
	Lompoc	3	3%				
	Oxnard	3	3%				
	Santa Maria / Guadalupe	3	3%				
	Buellton / Los Alamos	2	2%				
	Santa Ynez / Solvang	2	2%				
	Prefer not to answer	2	2%				
	Camarillo / Thousand Oaks	1	%				
Q9	What is the Zip Code of your current place of work? Verbatim responses recorded and later grouped into categories shown below.						
	Santa Barbara	77%					
	Goleta	18%					
	Camarillo / Fillmore / Carpinteria / Ventura	2%					
	Santa Maria	2%					
	Lompoc / Buellton / Santa Ynez	1%					
	Prefer not to answer	1	%				
Q10	In miles, what is the approximate distance between your residence and your place of work? <i>Enter miles in text box or check appropriate box.</i> Miles recorded and later groupe into categories shown below.						
	I work from home/telework every day	1%	Skip to Q13				
	Less than 5	42%	Ask Q11				
	6 to 15	36%	Ask Q11				
	16 to 30	5%	Ask Q11				
	31 to 50	11%	Ask Q11				
	51 or more	4%	Ask Q11				
	Prefer not to answer	1%	Ask Q11				

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Q11	If you don't make any stops along the way, how long does it typically take you to commute to work, one way? Minutes recorded and later grouped into categories below.				
	1 to 4	4%			
	5 to 9	19%			
	10 to 14	28%			
	15 to 19	18%			
	20 to 24	7%			
	25 to 44	9%			
	45 to 69	11%			
	70 or more	3%			
	Prefer not to answer	1%			
Q12	commuting to work?				
Q12	commuting to work? 1 Drive vehicle alone	72%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle)	72% 11%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in	72% 11%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) Vanpool (ride together with others in a vehicle owned by a private company or	72% 11%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) 3 Vanpool (ride together with others in a vehicle owned by a private company or the school)	72% 11% 2%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) Vanpool (ride together with others in a vehicle owned by a private company or the school) 4 Bus	72% 11% 2% 6%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) 3 Vanpool (ride together with others in a vehicle owned by a private company or the school) 4 Bus 5 Train	72% 11% 2% 6% 0%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) Vanpool (ride together with others in a vehicle owned by a private company or the school) 4 Bus 5 Train 6 Other public transit	72% 11% 2% 6% 0% 0%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) Vanpool (ride together with others in a vehicle owned by a private company or the school) 4 Bus 5 Train 6 Other public transit 7 Motorcycle	72% 11% 2% 6% 0% 0% 1%			
Q12	commuting to work? 1 Drive vehicle alone 2 Carpool (ride together with others in personally-owned vehicle) 3 Vanpool (ride together with others in a vehicle owned by a private company or the school) 4 Bus 5 Train 6 Other public transit 7 Motorcycle 8 Bicycle	72% 11% 2% 6% 0% 1% 6%			

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Page 4

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Q13		each of the following statements, please ement matches your opinion.	indicate	if you a	gree or	disagre	e that t	he		
	Ran	domize, but always show F last	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	No Opinion	Prefer not to		
А	my r	amount of money I pay per month for esidence is reasonable	25%	27%	21%	24%	2%	29		
В	need		43%	28%	16%	13%	0%	19		
С	neig	esidence is located in a nice hborhood	51%	36%	8%	4%	1%	0%		
D	néig	esidence is located in a safe hborhood	53%	36%	6%	3%	1%	09		
Ε	distr		33%	23%	10%	5%	28%	19		
F	resid	rall, I am satisfied with my current lence	35%	39%	16%	8%	1%	19		
As	K Q14	if Q5 = (1,3) OR (Q5 = 2 AND Q11 = 25 Q13F = (3		er) OR [Q5 = 2	AND Q	11 < 25	ANL		
Q14		e current housing market, can you afford quately meet your needs within a 25 min						?		
	1	Yes			4	%				
	2	No			88	88%				
	98	Not sure	7%							
	99	Prefer not to answer	0%							
		Ask Q15 if (Q11 = 25 or greater) OR	[Q11 <	25 AND	Q13F =	= (3,4)].				
		e current housing market, can you afford					d adequ	ately		
Q15		t your needs within a 25 minute drive of	,		21	5%				
Q15			, ea. ea.		23) /0				
Q15	mee	t your needs within a 25 minute drive of	,			9%				
Q15	mee 1	t your needs within a 25 minute drive of Yes			59					

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Q16		You previously indicated that your commute to work is at least 25 minutes, one way. Have you actively searched for suitable housing closer to your current work location?								
	1	Yes		56%	6	A	sk Q17			
	2	No		41%	6	Sk	cip to C	Q19		
	98	Not sure		0%		Sk	cip to C	219		
	99	Prefer not to answer		2%		Sk	cip to C	219		
Q17	Were	e you searching for rental housing or a h	iouse to	purch	ase?					
	1	Rental housing				32%				
	2	House to purchase				30%				
	3	Both				34%				
	98	Not sure				2%				
	99	Prefer not to answer				1%				
	1 2 98 99	Yes No Not sure Prefer not to answer				4% 94% 1% 1%				
	4	: Impacts Ask Q19 if Q11 = 25 or greater. Otherwis se indicate whether your work commute					ding Q.	21.		
Ran	domiz	e	Yes, A Lot	Yes, Somewhat	Yes, a Little	No Impact	Not Applicable	Not Sure	Prefer not to	
А		ices your productivity at work	13%	18%	20%	45%	1%	2%	1%	
В		uces opportunities to collaborate and work with other employees	33%	25%	17%	23%	1%	0%	1%	
~	Redu	uces your quality of life overall	29%	24%	27%	19%	0%	1%	0%	
С				. –	30%	16%	1%	0%		

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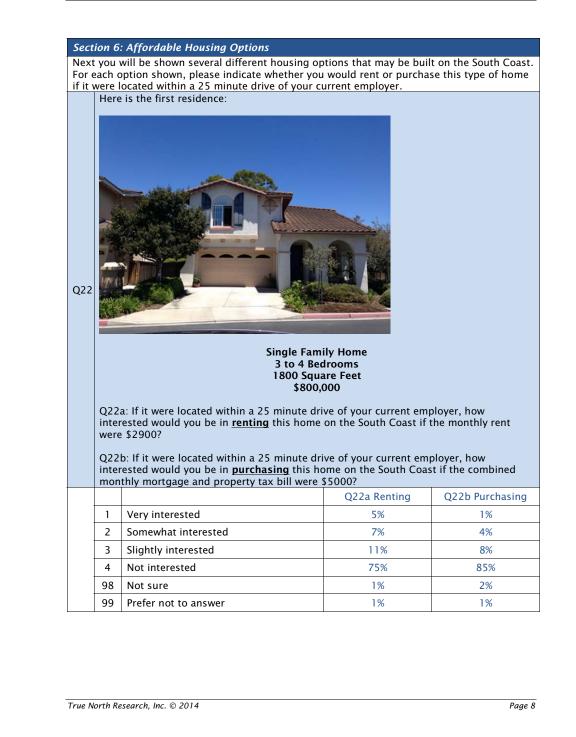
Ε		uces the amount of time you would erwise spend with your family	52% 19% 14% 11% 3% 0%				0%	0%	
F	Reduces your involvement in your local community			20%	16%	18%	1%	1%	1%
Q20	Have you considered changing employers so that you can work closer to your current residence?					it			
	1 Yes					40%			
	2	2 No 56%							
	98	Not sure	0%						
	99	Prefer not to answer				4%			
		Ask Q21 if Q	14 = 2.						
Q21		e you considered leaving the South Coast sing is more affordable?	so you	can w	ork an	d live i	n a reg	gion w	here
	1	Yes				68%			
	2	No	28%						
	98	Not sure				3%			
			1%						

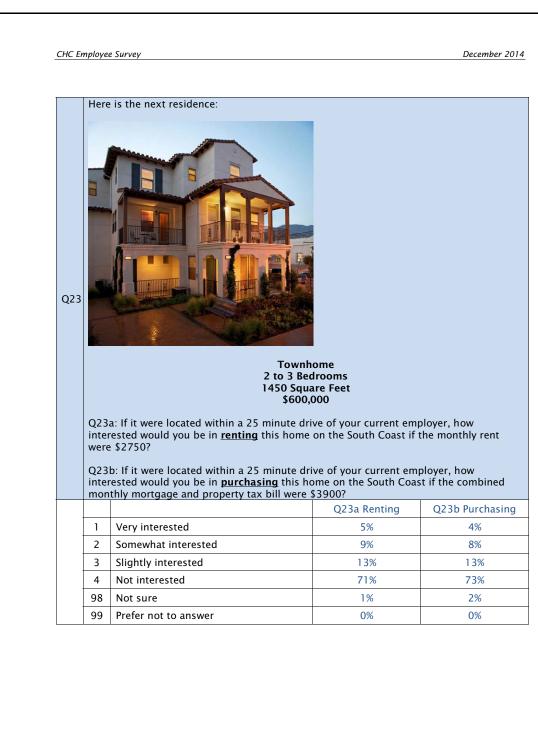
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Page 7

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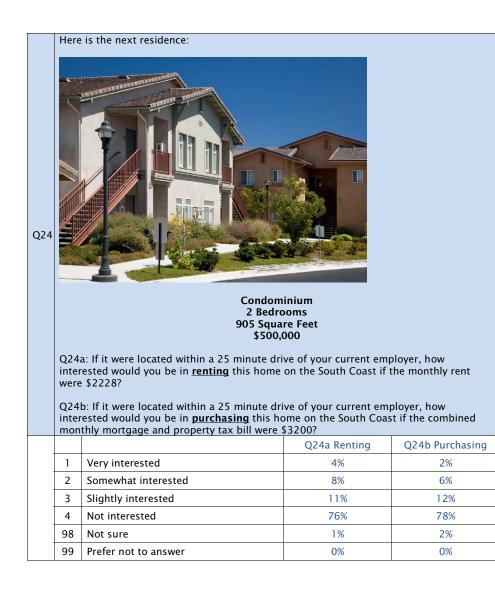
December 2014



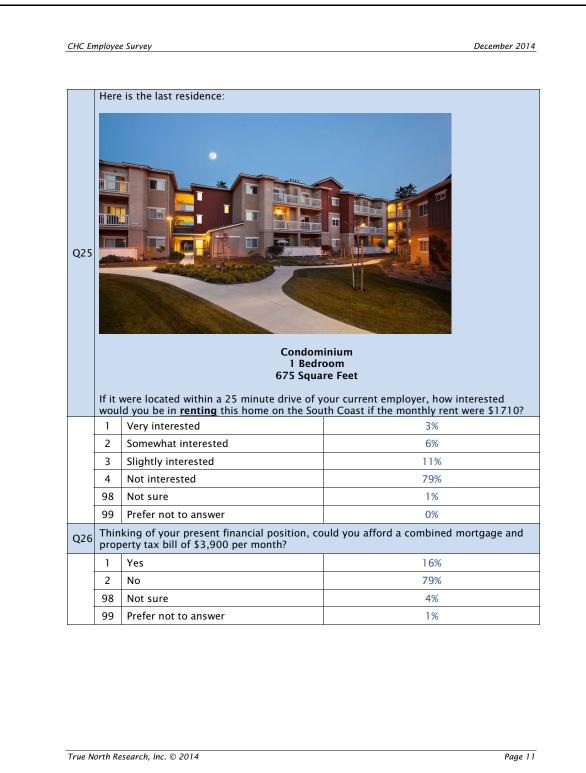


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Q27	Thinking of your present financial position, could you afford a down payment of \$60,000 to purchase a home? This is based on a down payment of 10% on a \$600,000 home.						
	1	Yes	28%				
	2	No	65%				
	98	Not sure	5%				
	99	Prefer not to answer	2%				

Section 7: Background & Demographics

Thank you so much for your participation. I have just a few demographic questions for statistical purposes.

D1	In what year were you born? Year recorded and grouped into categories shown below.						
	18 t	o 24		5%			
	25 t	o 34		26%			
	35 to 44			18%			
	45 t	o 54		20%			
	55 t	o 64		19%			
	65 c	or older		3%			
	Pref	er not to answer		9%			
D2	What is your marital status?						
	1	Married	53%	Ask D3			
	2	Single	31%	Skip to D4			
	3	Divorced	9%	Skip to D4			
	4	Widow/Widower	1%	Skip to D4			
	5	Domestic partnership	4%	Ask D3			
	99	Prefer not to answer	2%	Skip to D4			
D3	Doe	s your spouse/significant other work	?				
	1	Yes, full-time		68%			
	2	Yes, part-time		16%			
	3	No, doesn't work		14%			
	99	Prefer not to answer		2%			

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CHC Employee Survey

December 2014

	51100	vn below.					
	1		16%				
	2		36%				
	3		21%				
	4 or	more	24%				
	Prefe	er not to answer	3%				
D5		many adults 18 or older live in your hous gories shown below.	ehold? Number recorded and grouped int				
	1		20%				
	2		56%				
	3 or	more	20%				
	Prefe	er not to answer	3%				
D6	What is the last grade or level you completed in school?						
	1	Elementary (8 or fewer years)	0%				
	2	Some high school (9 to 11 years)	0%				
	3	High school graduate (12 years)	2%				
	4	Technical / Vocational school	2%				
	5	Some college	17%				
	6	College graduate	44%				
	7	Some graduate school	6%				
	8	Graduate, professional, doctorate degree (DDS, DVM, JD, LLM, MA, MS, MBA, MD, PhD)	28%				
	98	Not Sure	0%				
	99	Prefer not to answer	1%				
D7	This last question is for statistical purposes only and is completely confidential. Please select the category that best represents your household's total annual income before taxes. This would include your income plus your spouse's/partner's, if applicable.						
	1	Less than \$25,000	2%				
	2	\$25,000 to \$49,999	17%				
	3	\$50,000 to \$74,999	20%				
	4	\$75,000 to \$99,999	16%				
	5	\$100,000 to \$149,999	21%				
	6	\$150,000 to \$199,999	8%				
	7	\$200,000 or more	6%				

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1

11

 CHC Employee Survey
 December 2014

 98
 Not sure
 2%

 99
 Prefer not to answer
 8%

 1
 If you would like to be entered into the sweepstakes to win one of five \$100 gift certificates to Paseo Nuevo for participating in this survey, please provide your name and contact information below. This information will only be used to contact you if you are selected for a prize.

 0
 Data on file

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