SANTA CLARITA VALLEY
LABOR MARKET STUDY – 2012

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Prepared for:

SANTA CLARITA VALLEY

ECONOMIC DEVELOPMENT CORP.

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Introduction

This 2012 labor market study assesses the workforce of Santa Clarita Valley (SCV) based on a survey of resident households. The purpose of the labor market study is to assist the Santa Clarita Valley Economic Development Corporation identify local workforce skills that can be utilized to support future business growth and expansion in this area of Los Angeles County. The labor market study also compares selected characteristics that distinguish the workforce in Santa Clarita Valley from the workforce that resides in the San Fernando Valley (SFV) and throughout Los Angeles County. Finally, the labor market study is supplemented by a survey of area businesses to determine labor skills most needed to support business growth over the next couple of years.

The approach underlying the labor market study and related findings consisted of three basic research components.

- A random digit-dial phone survey of 600 SCV households was conducted in March. Many key study findings are based on the results of the survey.
- A multitude of published data sources were assessed in order to compare business, workforce, and population characteristics describing households and workers residing in the SCV, SFV, and throughout Los Angeles County.
- Mail invitations were delivered to more than 1,500 SCV businesses. The survey focused on factors expected to benefit-challenge business growth and labor skills most demanded over the next couple of years.

Key Study Findings

The following study findings highlight factors the Santa Clarita Valley Economic Development Corporation should consider in the context of current economic programming activities and the future programs intended to stimulate business relocation and expansion and related employment growth.

- The SCV hosts a highly-educated, well-trained and motivated workforce of nearly 130,000 workers. Over half the local workforce is college educated and employed in occupations that require at least 4 years of college education. Workforce participation among SCV households is also high at 1.55 workers per household (payroll and self-employed workers), compared to an average of 1.43 per household for all of Los Angeles County.
- The SCV area has seen rapid population and business growth over the past 10 years. Despite its vibrancy, the SCV is still too small to function as an isolated labor market. Local business and employment growth will be best served if the

SCV can leverage its role as an important but component part of a larger labor market that extends into the SFV.

- Estimates based on Census data, EDD employment data, and the 2012 survey of area households suggest that at least 35% of the local workforce (or roughly 45,000 workers) must travel to jobs located outside the SCV. Many of the workers that work outside the SCV are employed in high-skill occupations.
- Wages reported by SCV workers in high-skill occupations represent a cost advantage for businesses seeking to locate or expand in the local area that will also need workers in skilled positions.
- The high skill profile of the SCV workforce presents opportunities and challenges for rapid business expansion over the mid-term. Occupation employment projections indicate workers with experience-based skills (vocational training, on-the-job training, etc.) will account for two-thirds of employment demand throughout the region over the next several years.
- The SCV should be promoted as an attractive commute option for many workers with experience-based skills that currently live in the SFV or the Antelope Valley as part of a larger business growth strategy. An expanded employment base in the SCV would significantly shorten the work commute for a minimum of 1 out of 5 of the 750,000 workers that now reside in the SFV.
- About 2 out of every 5 workers living in the SCV indicate they are willing to accept a reduction in pay if offered a similar job that substantially reduces their work commute and related travel cost. The acceptable limit of a wage reduction varies from 3% to 12% on average, with the largest share of workers identifying a 10% reduction as acceptable.
- Top labor skills in demand by local area businesses vary by industry group and largely reflect specific operating requirements of a given enterprise. Overall, about 45% of area businesses identify training-based skills as most in demand; 40% identify existing job-related skills; and 15% identify education-based skills.
- Labor skills most in demand also vary by size of firm. Businesses with 50 or more employees cite a strong interest in workers with related vocational training—36%, and workers with education based skills—23%. By comparison, 50% of businesses with 10 to 49 employees identify workers with existing job-related skills as being most in demand.

Regional-Geographic Setting

The SCV is part of a larger regional labor market that stretches across the SFV and through central portions of Los Angeles County (Figure 1). Due to the immense geographic scale and population base that describes Los Angeles County, the SCV functions as an important but component part of a larger economic region.

- Los Angeles County covers more than 4,080 square miles; hosts 88 incorporated cities, and is host to more than 9.8 million residents and 4.2 million workers. The resident population of Los Angeles County would rank it as the eighth most populated state in the U.S.

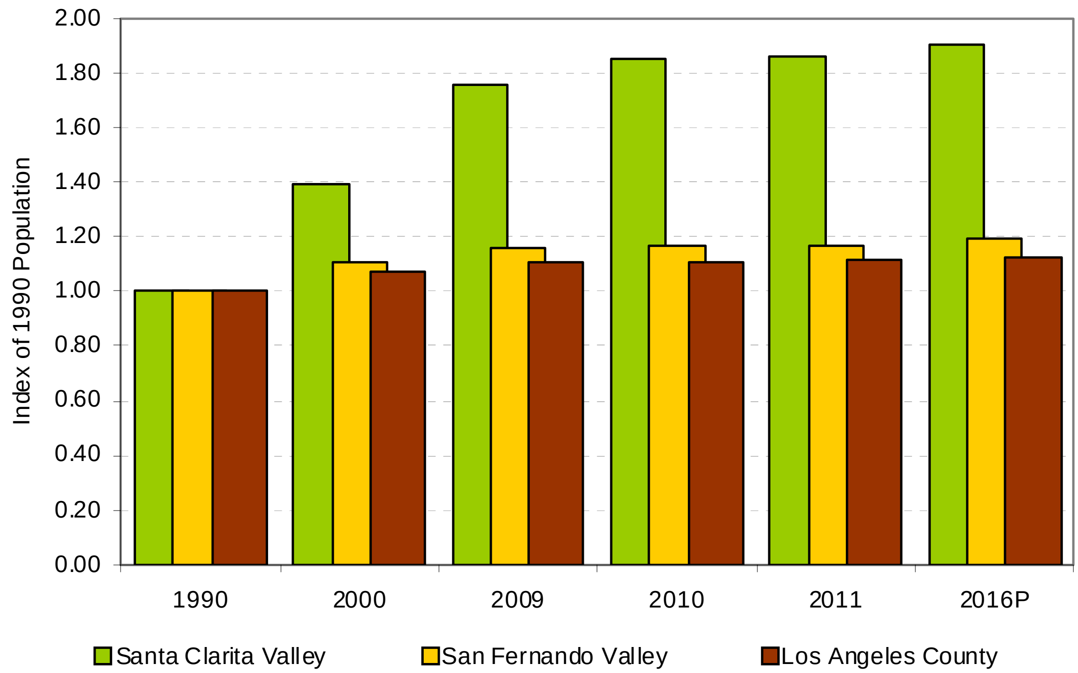
- The San Fernando Valley (SFV) is a long-established population and business area within Los Angeles County. The eastern and western portions of the SFV only encompass about 295 square miles but host over 1.5 million residents and 0.75 million workers. The SFV is a largely urbanized area with a population density of about 5,200 persons per square mile.
- The SCV is a relatively new and growing area within Los Angeles County. The Santa Clarita Valley Planning Area encompasses 520 square miles but less than 3.0% of the total population in Los Angeles County at 275,000 residents. The City of Santa Clarita is the only incorporated city in the SCV, but with 177,000 residents is the fourth largest city in Los Angeles County. Most developed portions of the SCV reflect a master planned suburban setting with an overall population density of about 3,300 persons per square mile.

Figure 1
Labor Market Region

Source: ESRI; AGA

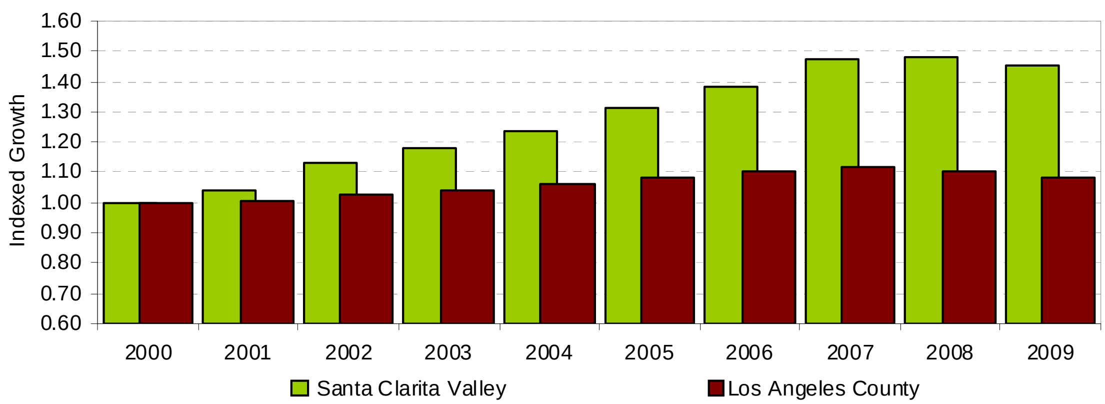
- Although SCV presently accounts for less than 3.0% of the total population of Los Angeles County, the relative pace of population growth has been significantly faster than in the adjoining SFV and the County as a whole (Figure 2). Between 2000 and 2010, total SCV population increased by nearly one-third.
- The pace of new business growth in the SCV has been even more rapid than population growth (Figure 3). The number of businesses in the SCV increased more than one-half over a 10-year period, with 5,870 payroll establishments reported during the first half of 2010.

Figure 2
Population Growth Trends - Selected Areas



Source: ESRI ACS 2005-09 Population Report; US Census; ESRI 2011 Demographic Profile; AGA.

Figure 3
Payroll Establishment Growth Trends



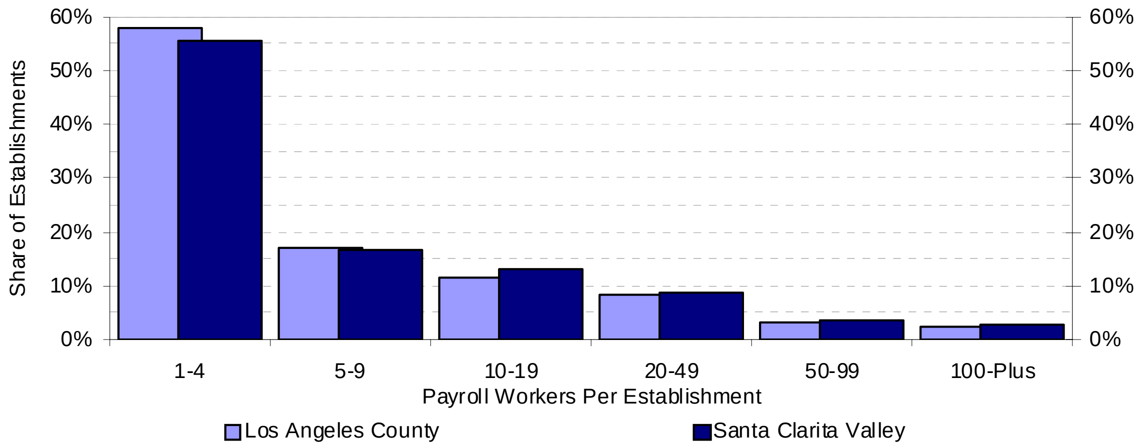
Geographic Area	Total Number of Payroll Establishments									
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Santa Clarita Valley	3,883	4,044	4,386	4,569	4,789	5,093	5,382	5,727	5,750	5,634
Los Angeles Co	226,282	227,941	231,948	235,085	239,571	244,859	249,977	253,004	250,255	245,523

Note: Santa Clarita Valley includes ZIP Codes: 91321, 91350, 91351, 91354, 91355, 91381, 91384, 91387, & 91390.

Source: U.S. Census Bureau - County Business Patterns; California Employment Development Department; AGA.

- SCV business growth has not been driven by a handful of large localized businesses or amassed around a single industry. SCV business growth reflects a diverse mix of production and service activities as indicated by the size distribution of payroll establishments (Figure 4) and corresponding industry mix (Figure 5) which compares favorably with Los Angeles County.

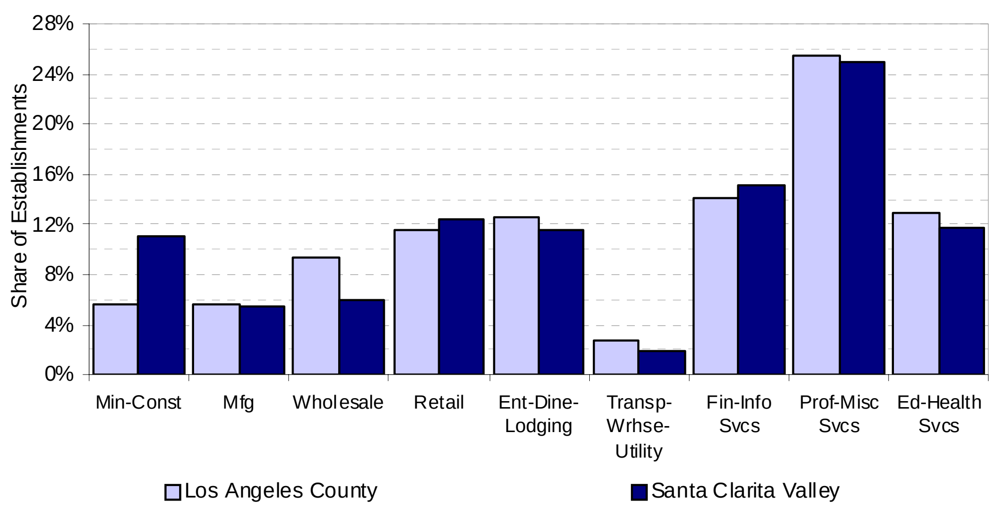
Figure 4
Size Range Mix Of Payroll Establishments



Note: Santa Clarita Valley includes ZIP Codes: 91321, 91350, 91351, 91354, 91355, 91381, 91384, 91387, & 91390

Source: U.S. Census Bureau - County Business Patterns; California Employment Development Department; AGA.

Figure 5
Industry Mix Of Private Payroll Establishments - 2009

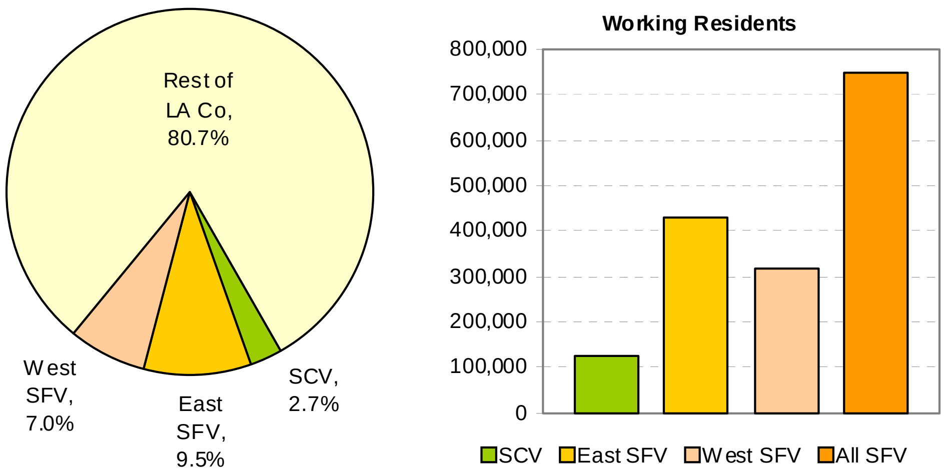


Santa Clarita Valley includes ZIP Codes: 91321, 91350, 91351, 91354, 91355, 91381, 91384, 91387, & 91390.

Source: U.S. Census Bureau - 2009 County Business Patterns; AGA.

- While vibrant and diverse, the business and industrial complex that describes the SCV is not large enough to exist as an isolated and independent labor market (Figure 6). Sustained economic and business growth over the mid-term will be greatly influenced by the ability to attract workers residing in adjacent sub-market locations such as the SFV and the Antelope Valley.

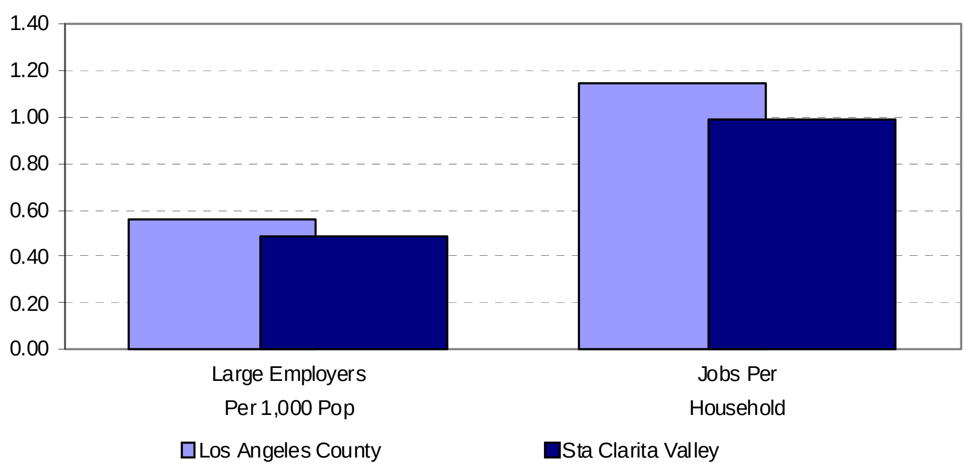
Figure 6
Workforce Employment - Selected Comparisons



Source: ESRI ACS 2005-09 Population Report; AGA.

- Despite strong business growth and expansion over the past 10 years, the SCV remains relatively undersupplied in terms of larger business representation and supply of local payroll jobs available to area households (Figure 7).

Figure 7
Santa Clarita Valley Local Business & Employment Representation



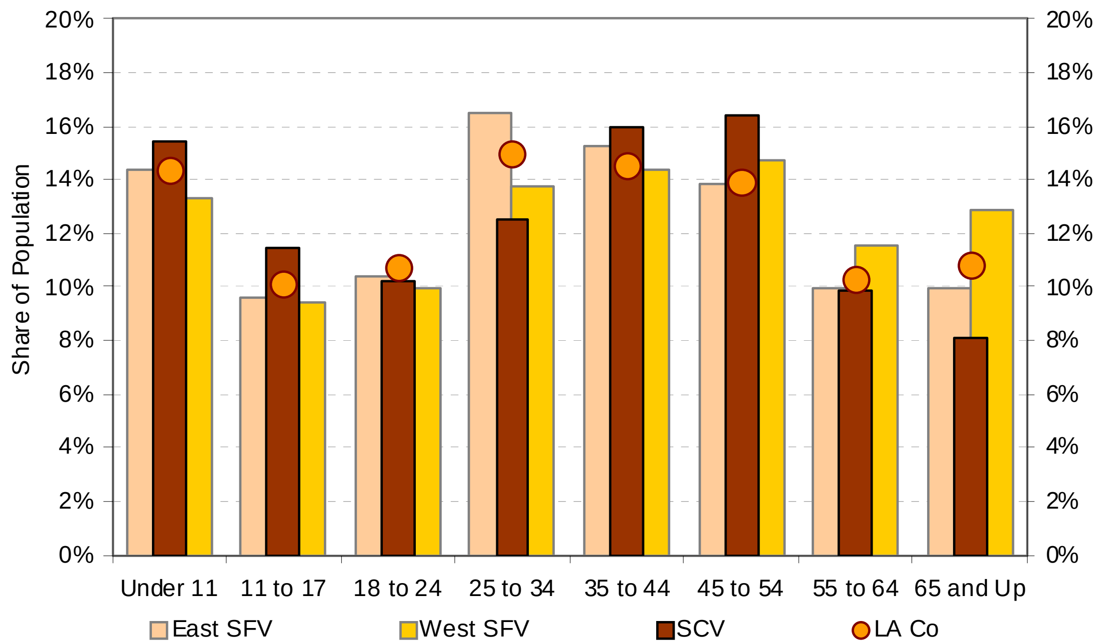
Note: Large employers include businesses with 100 plus payroll employees

Source: U.S. Census Bureau - 2009 County Business Patterns; AGA.

Labor Market Area Comparisons

A number of demographic characteristics that distinguish the SCV from the adjoining SFV area underscore the SCV as an attractive pool of highly-qualified workers available to businesses over the near- to mid-term. Selected comparisons of household survey data describing the SCV and Census Bureau-America Community Survey data describing the SFV and Los Angeles County are summarized below.

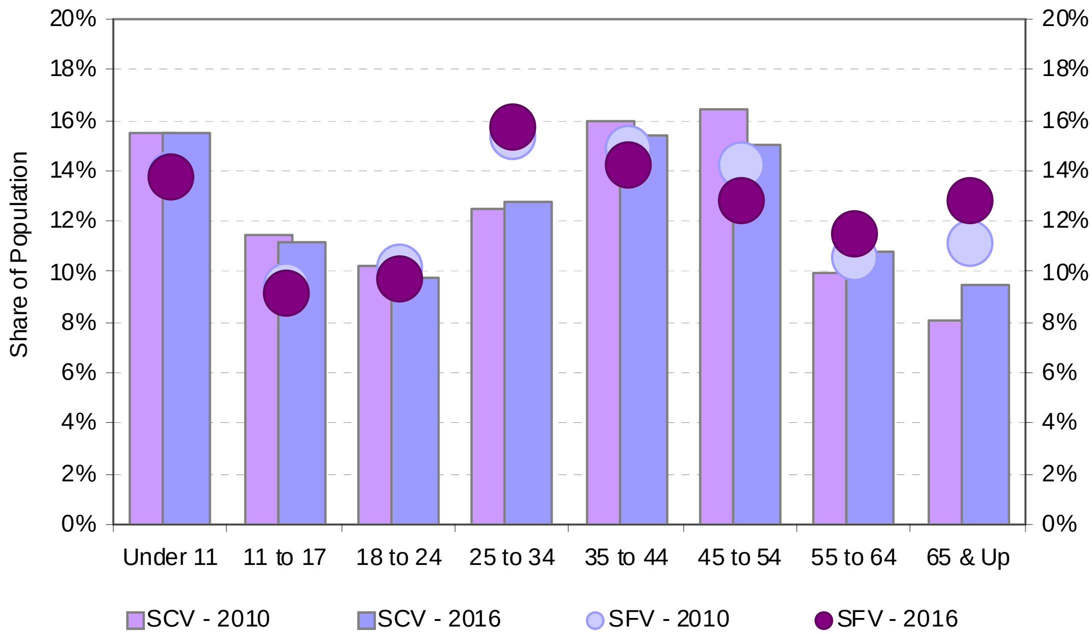
Figure 8
Santa Clarita-San Fernando Valley Age Distribution - 2010



Source: ESRI Demographic Summary of 2010 Census; AGA.

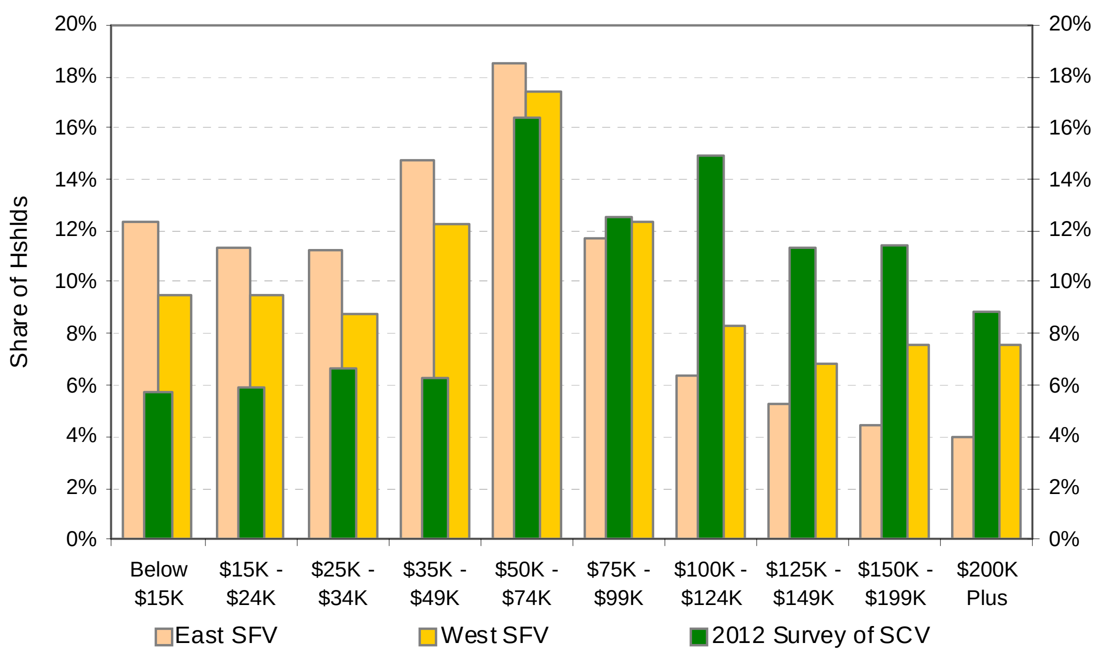
- The SCV includes a relatively large share of residents between 35 and 54 years of age, an age range typified by a high rate of advancement in work skills and earnings potential (Figure 8).
- The SCV also includes a relatively high proportion of youth ages 11 to 17 that will be entering the workforce over the next 3 to 6 years (Figure 8).
- Over the next several years, an increased number of workers throughout the SCV and SFV with extensive job experience and related job skills will be leaving the workforce for retirement (Figure 9).
- Over the next several years, however, the SCV will continue to be characterized by a relatively high share of workers with extensive job experience and related job skills (Figure 9).

Figure 9
Santa Clarita-San Fernando Valley Age Distribution Change



Source: ESRI 2010-11-16 Demographic Estimates; AGA.

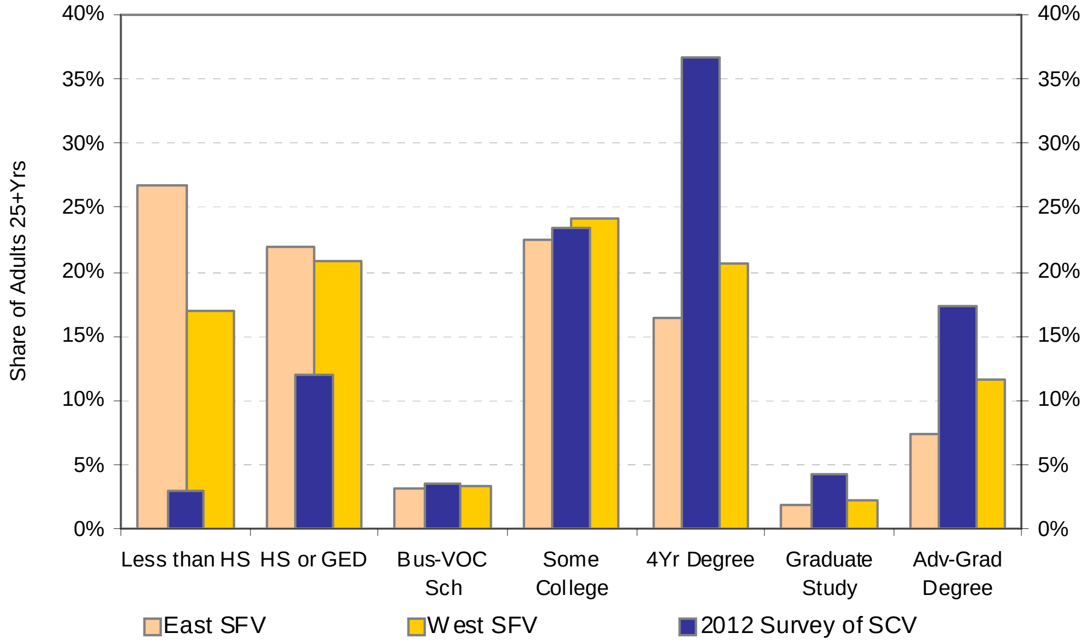
Figure 10
Santa Clarita-San Fernando Valley Household Income Distribution



Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

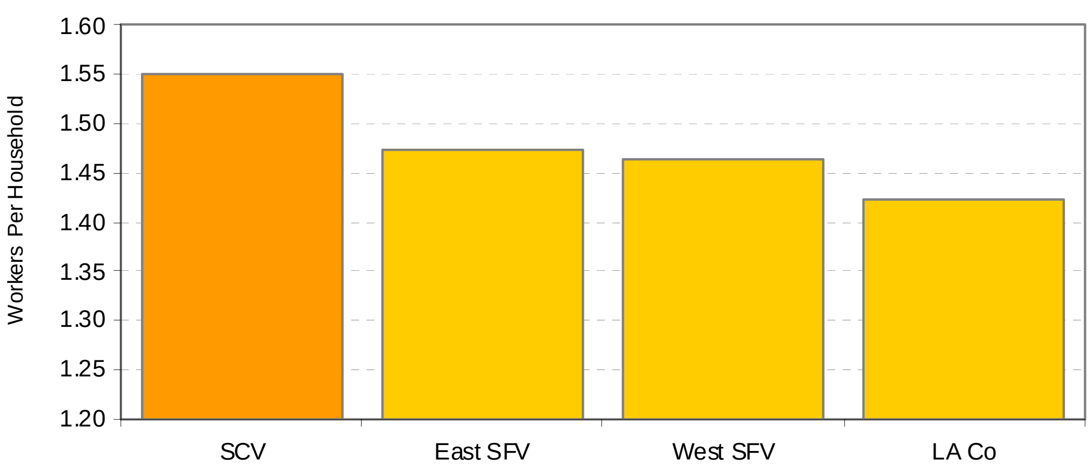
- A relatively large number of adults in their top wage earning years is a likely factor contributing to a significantly high share of households with total annual income exceeding $100,000 per year (Figure 10).

Figure 11
Santa Clarita-San Fernando Valley Educational Acheivement



Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

Figure 12
Santa Clarita-San Fernando Valley Workforce Participation

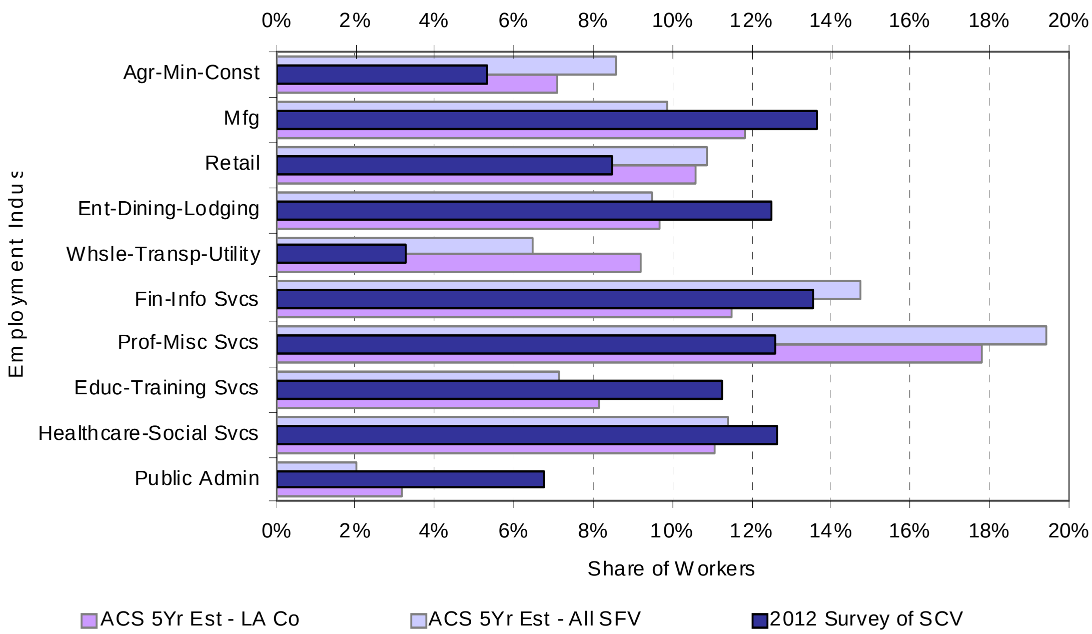


Note: Describes payroll & non-payroll workers including self-employed and non-paid family workers.

Source: American Community Survey 2005-09 Population Estimates; AGA.

- Over 58% of SCV adults have a four-year degree or higher level of academic achievement compared to 26% for the East SFV and 36% for the West SFV. By comparison, less than 15% of SCV adults have a high school or lower level of education compared to nearly 50% for the East SFV and 36% for West SFV (Figure 11).
- SCV households are characterized by a high level of workforce participation equal to 1.55 workers per household (Figure 12), a factor contributing to a substantial share of high-income households.
- The high ratio of workers per household in SCV also increases the structural demand for rapid expansion of local business and employment in order to reduce the number of resident workers who now leave SCV to work (Figure 12).

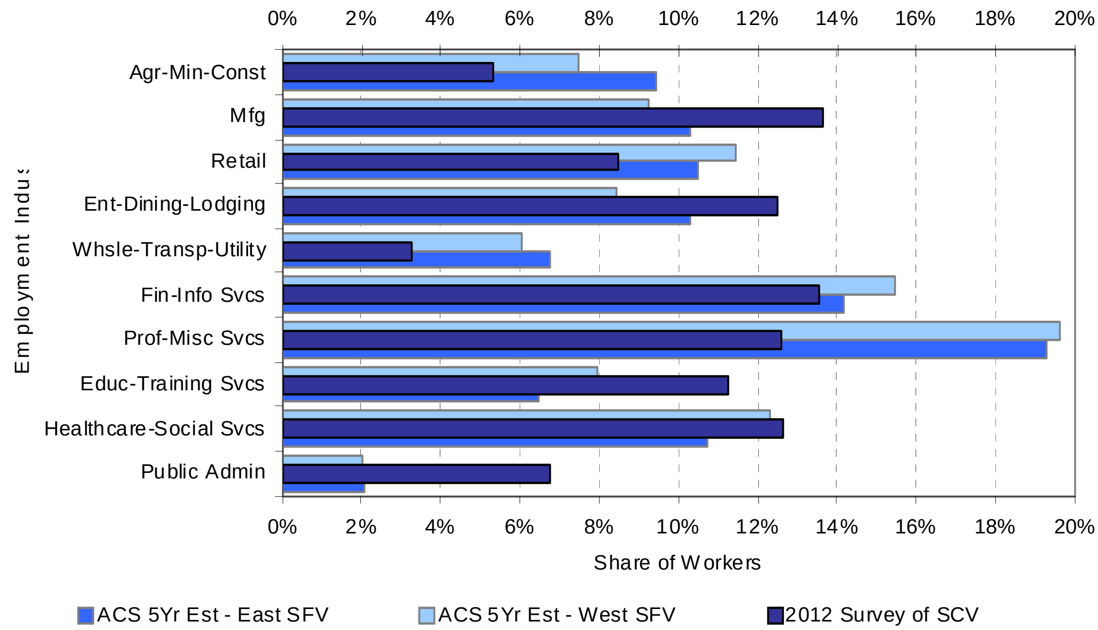
Figure 13
Selected Comparisons of Workforce Employment Industry



Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

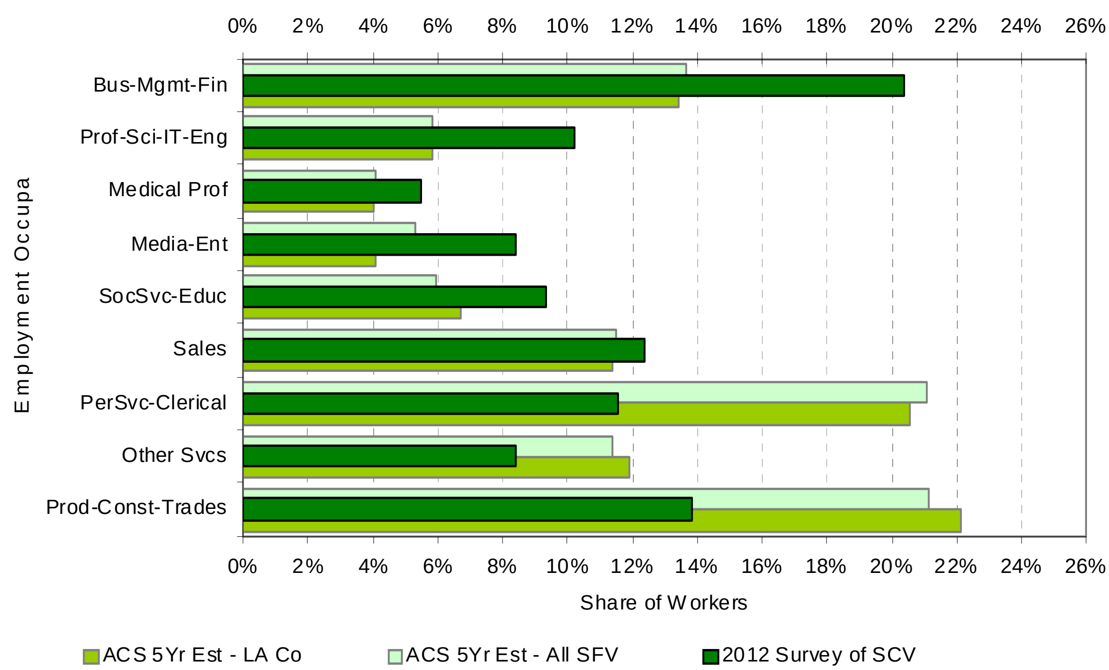
- SCV workers are employed in a diverse range of industries (Figure 13). A unique mix of industry experience also distinguishes SCV workers from East SFV and West SFV and throughout all of Los Angeles County (Figure 14).
- An underlying factor contributing to the industry mix of workers that reside in the SCV is the mix of worker occupations (Figure 15). A high share of SCV workers have occupations that require advance degrees, 4-year college education, and academic-based technical training compared to a high share of SFV workers with occupations that require experience-based skills associated with sales, personal service, clerical, and trades (Figure 16).

Figure 14
Santa Clarita-San Fernando Valley Industry Employment Comparisons



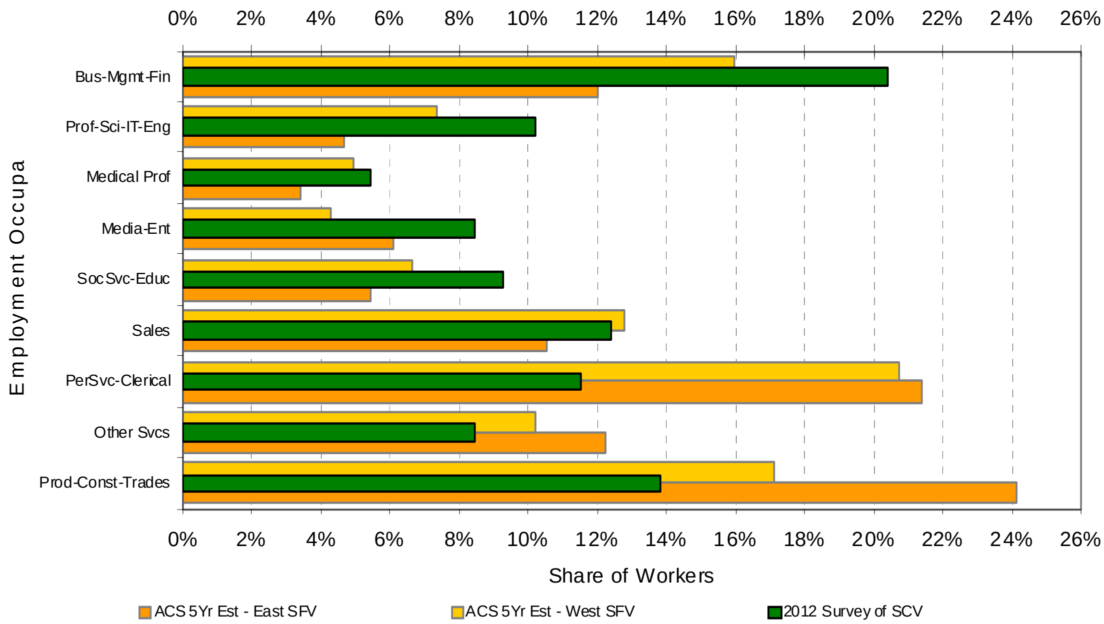
Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

Figure 15
Selected Comparisons of Workforce Employment Occupation



Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

Figure 16
Santa Clarita-San Fernando Valley Occupation Employment Comparisons

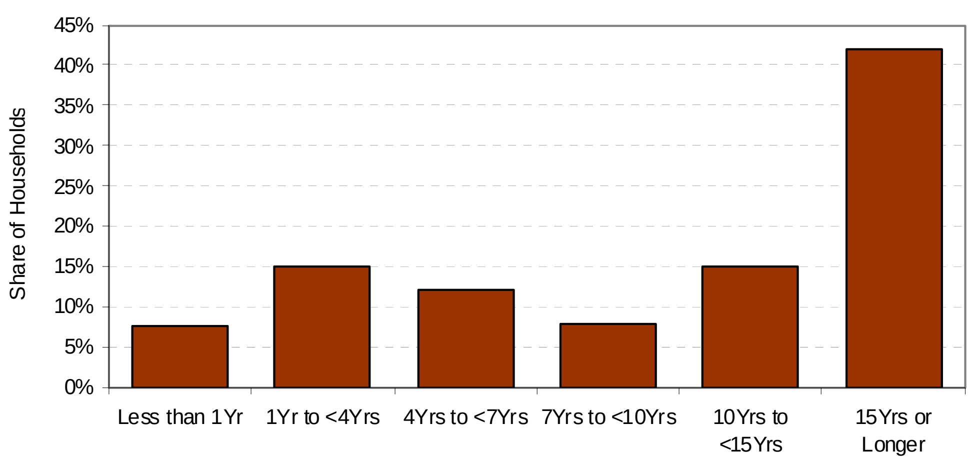


Source: Santa Clarita Valley EDC - 2012 Labor Market Survey; American Community Survey 5Yr Population Est.

General Workforce Characteristics

The survey of SCV households identified general workforce characteristics useful in assessing the employment status and work habits of adult household members.

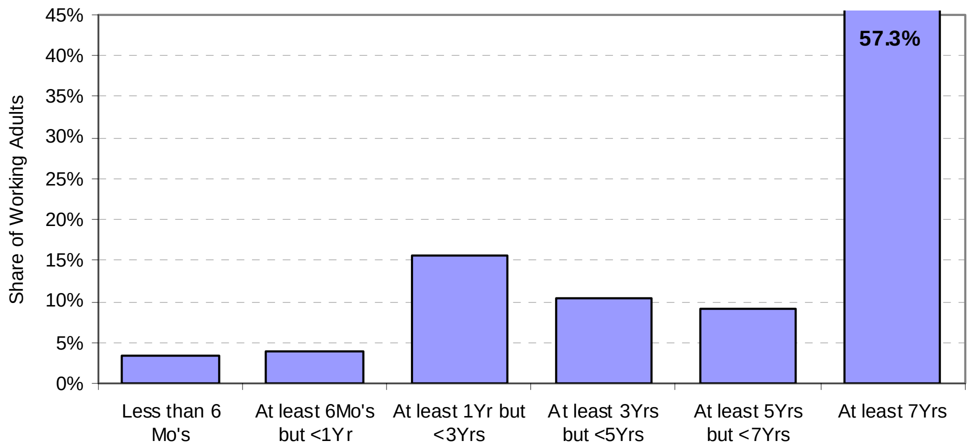
Figure 17
Household Time Living in Santa Clarita Valley



Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=600]

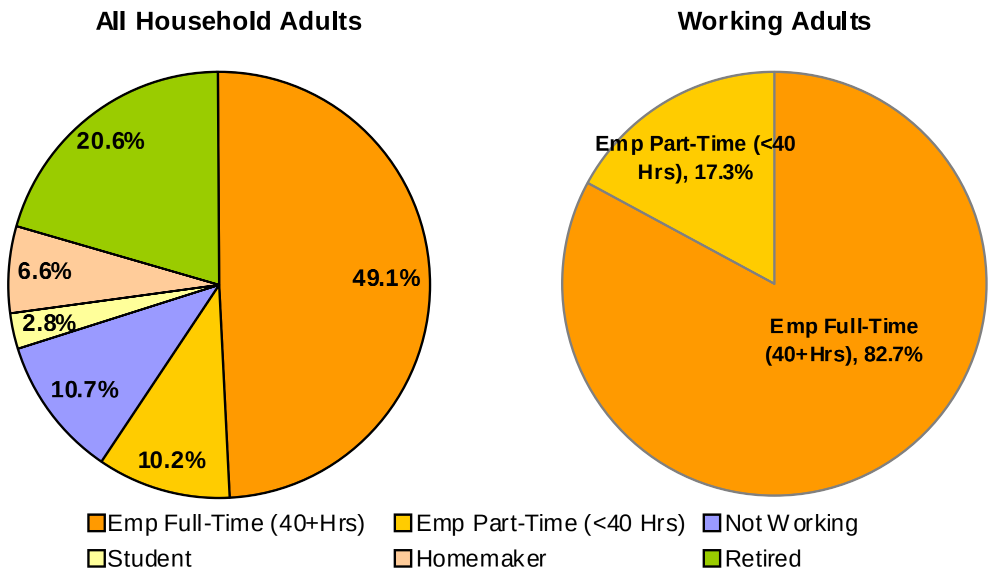
Figure 18
Working Adult Time on Job



Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=336]

- While the SCV is a relatively new and rapidly-growing area of Los Angeles County, more than 4 out of 10 households surveyed have lived in the area at least 15 years, an indication of household stability, while less than 10% report living in the area less than 1 year (Figure 17).
- SCV workers are characterized by a similarly high degree of job stability. About 57% of all working householders have been in their current job for at least 7 years, while less than 10% report being in their current job less than 1 year (Figure 18).

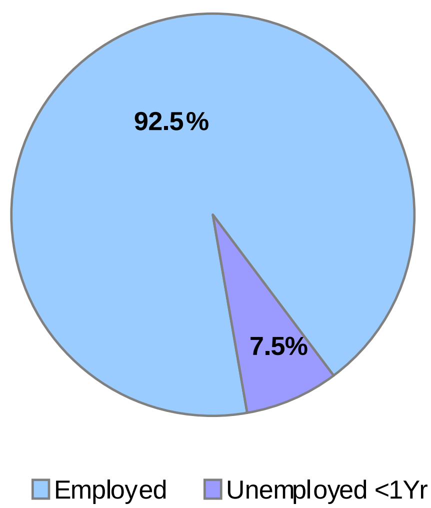
Figure 19
Workforce-Employment Status of Adults

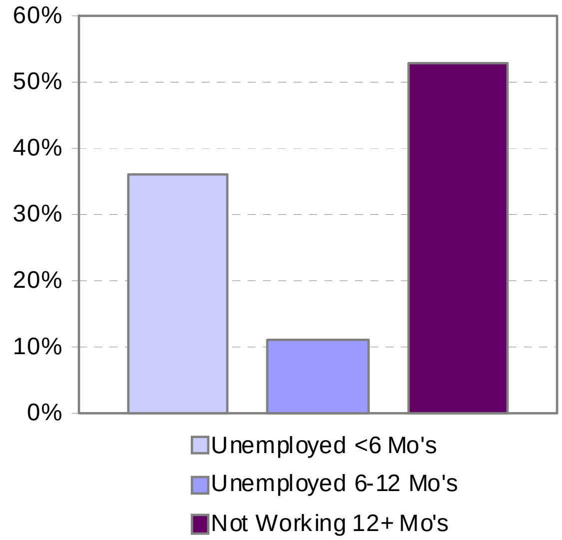


Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=1238]

- Roughly 60% of all household adults are actively working (Figure 19), which underscores the relatively high rate of workforce participation (1.55 workers per household) that characterizes the SCV.
- The household survey indicates that 1 out of 5 adult household members claim to be retired (Figure 19). By comparison, Census-based data indicates roughly 1 out of 8 adults are 65 years of age or older. In short, the household survey suggests some working-age adults in the SCV may be claiming to be retired as a consequence of The Great Recession.
- Nearly 83% of adults that are currently working indicate working on a full-time basis, while about 17% indicate working on a part-time basis (Figure 19).
- Nearly 11% of adult household members indicate being unemployed and looking for work (Figure 19). Those claiming to be unemployed include a high number of adults out of work for more than 12 months (Figure 20).

Figure 20
Unemployment Characterisitcs of Adult Workforce



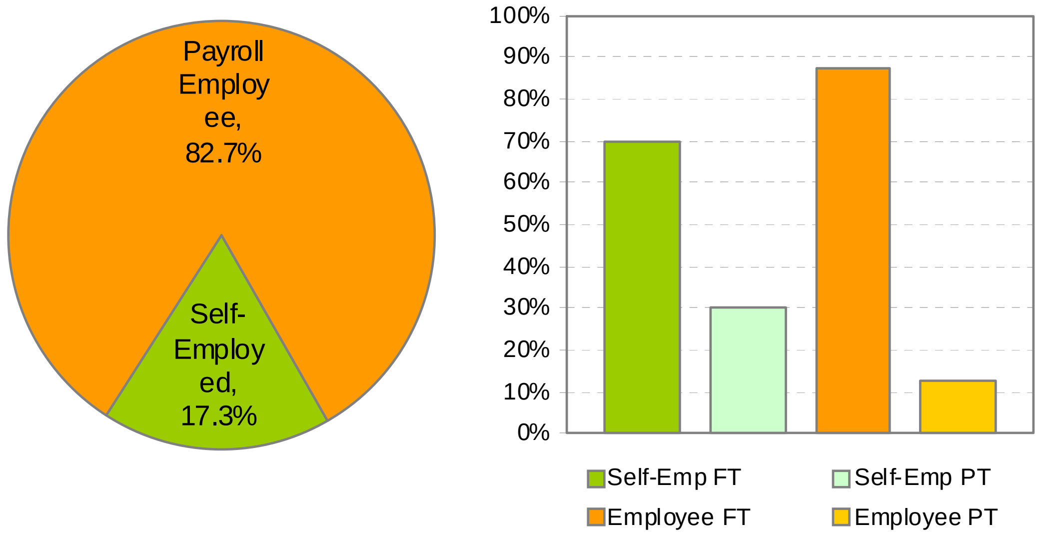


Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=920]

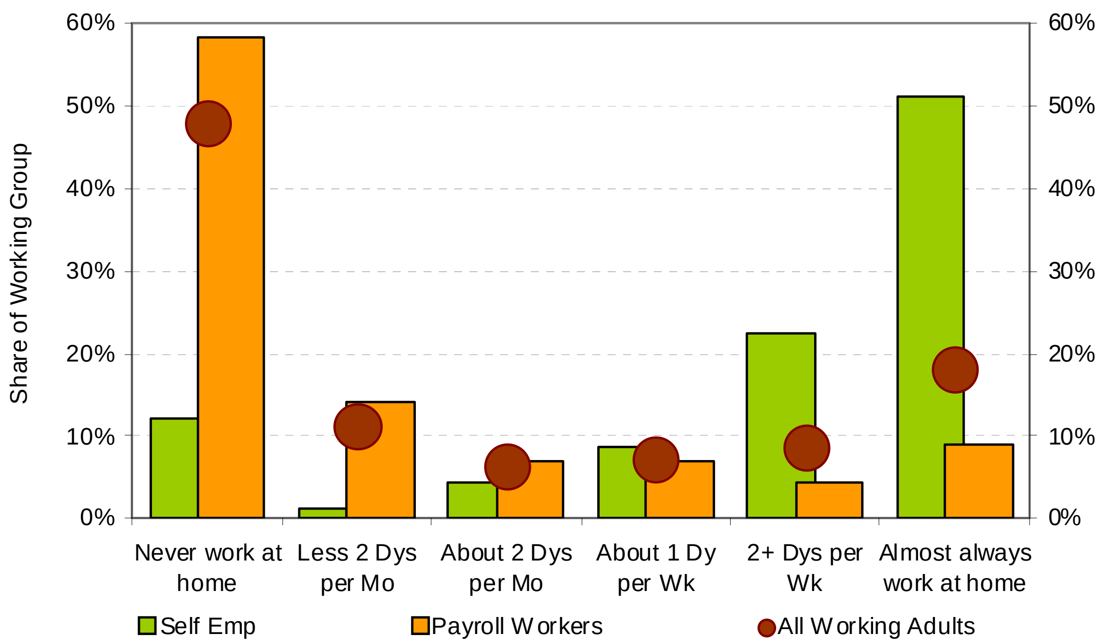
- Official unemployment figures are based on unemployment claims for people out of work less than 12 months. Based on a 12-month reporting limit, about 7.5% of the adult workforce in the SCV is unemployed (Figure 20).
- Working adults include those who are on a company payroll and those who may be self-employed, business owners, or work without regular pay for a family business (Figure 21). Within the SCV, about 83% of working adults are payroll employees working for an employer and about 17% are not on a company payroll (identified as self-employed).
- Among self-employed adults, about 70% work full-time and 30% work part-time. By comparison, 87% of payroll employee residing in the SCV work full-time and 13% work part-time (Figure 21).

Figure 21
Self-Employment & Full-Time Status of Working Adults



Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=734]

Figure 22
Frequency of Adults Working at Home



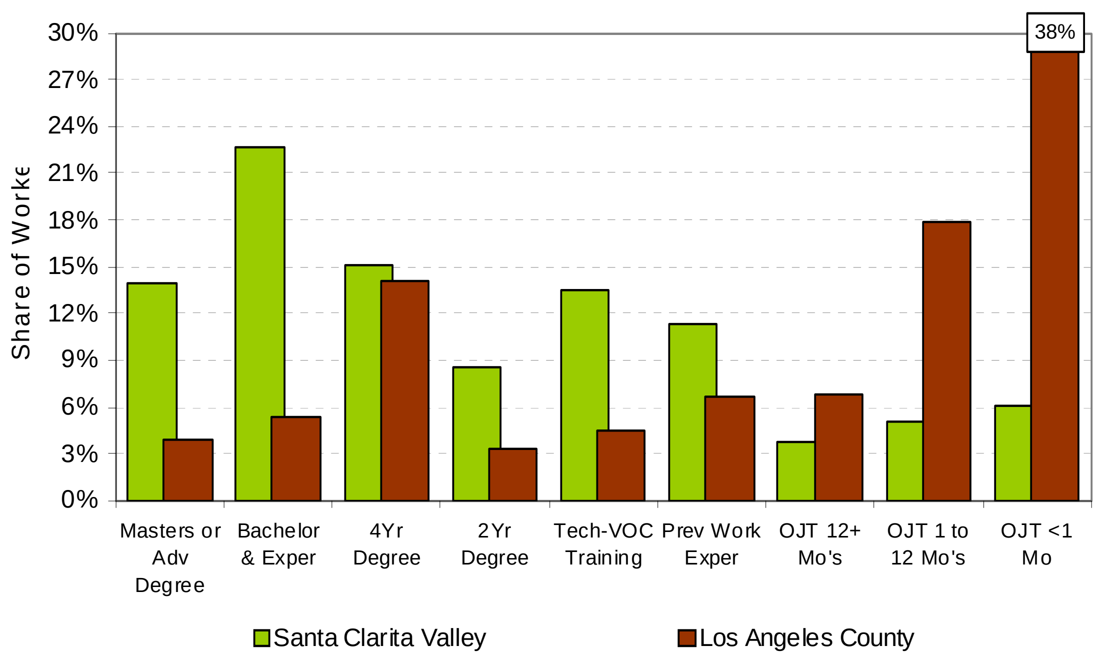
Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=333]

- Less than 10% of payroll employees that live in the SCV identify "home" as their primary work location. By comparison, over 50% of self-employed workers identify "home" as their primary place of work (Figure 22).

Workforce Education-Training

Worker employment industry and employment occupation offer the most widely-recognized metrics to assess workforce capacity. Within any given industry, a wide variety of occupations are required to fulfill business operating objectives. While useful, industry and occupation employment data does not identify the corresponding level of education, experience, or training required to effectively perform a job. To better assess workforce needs and abilities, the Bureau of Labor developed a system for classifying threshold levels of education and skills training (ranging from advance degrees to on-the-job training) recommended for distinct job occupations.

Figure 23
Santa Clarita Valley-Los Angeles County Worker Education-Skills Profile

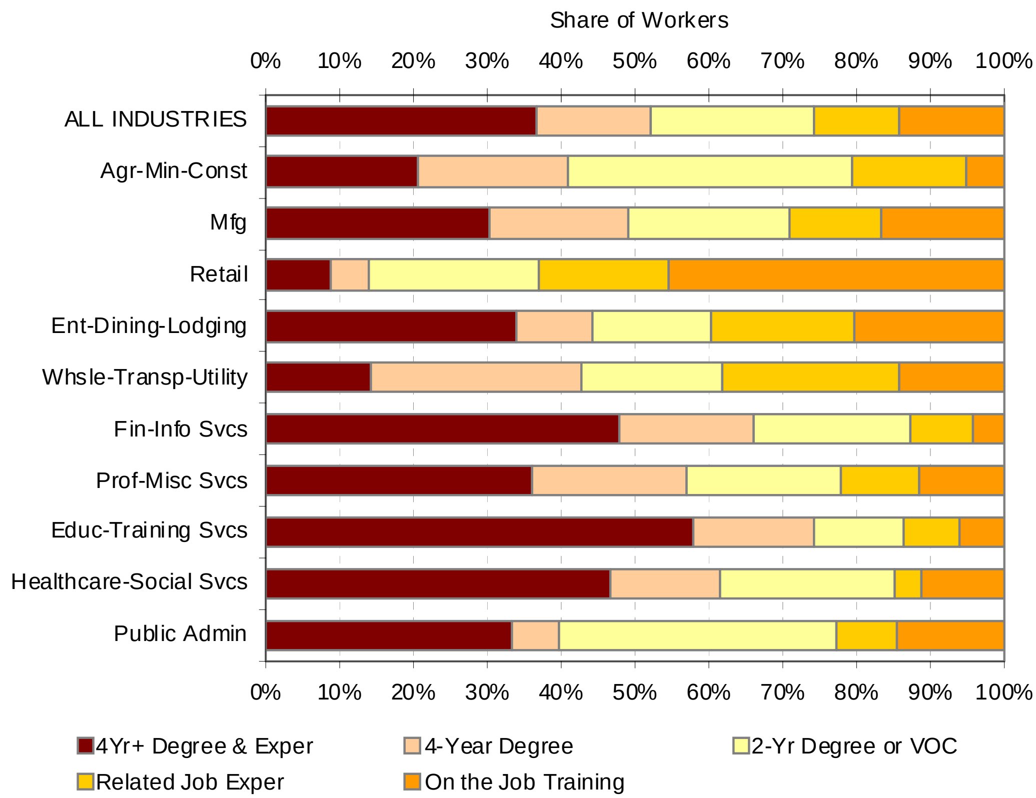


Source: CA-EDD Labor Market Projections LA County; SCV-EDC Labor Market Survey - 2012.

- Results of the household survey indicate that more than 50% of SCV workers are employed in occupations that, at a minimum, require a bachelors degree or an advance degree and related work experience in order to effectively do their job (Figure 23)
- In contrast to the high skill focus of SCV workers, over 60% of the existing and projected employment occupations describing Los Angeles County can be effectively performed with varying levels of on-the-job training. By comparison, only about 25% of all employment occupations throughout Los Angeles County require at least a 4-year degree or higher level of education and skill (Figure 23).

- The superior level of education and training that characterizes SCV workers presents opportunities and challenges. High-skill workers can readily fill positions critical to the relocation or expansion of area businesses. Even with rapid business growth in the SCV, however, there is not likely to be enough high-skill positions demanded within the local area for all resident workers who currently possess such skills (Figure 23).
- Not all work occupations demanded require extensive academic-based skills. The vast majority of occupations demanded across a multitude of industries throughout the region rely on experienced-based skills acquired through vocational training, on-the-job training, or related work experience (Figure 23).

Figure 24
Worker Education-Skills By Industry

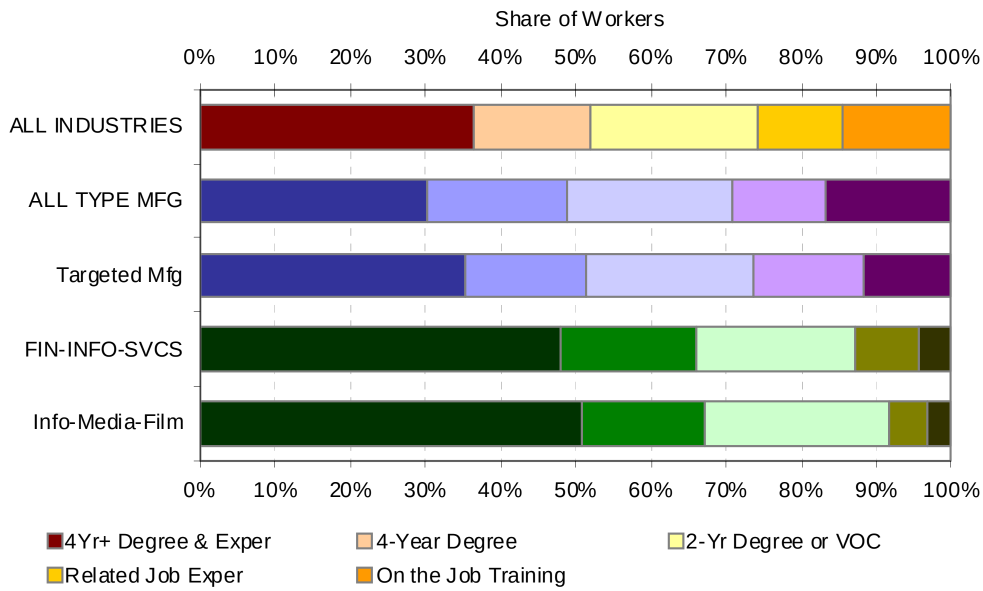


Source: SCV-EDC 2012 Labor Market Survey. Note: Survey Respone [n=698]

- Across all industries, more than half of SCV workers are employed in jobs that require academic-based skills—college-level education. By comparison, nearly one-half are employed in jobs that require experience-based skills—some college, vocational training, and on-the-job training (Figure 24).
- Industries that rely most extensively on the academic-based skills of SCV workers include education & training—74%; financial & information—66%; and healthcare & social services—61% (Figure 24).
- Worker education and training skills required by SCV target industries—aerospace-defense, medical devices, advanced manufacturing, digital media, and

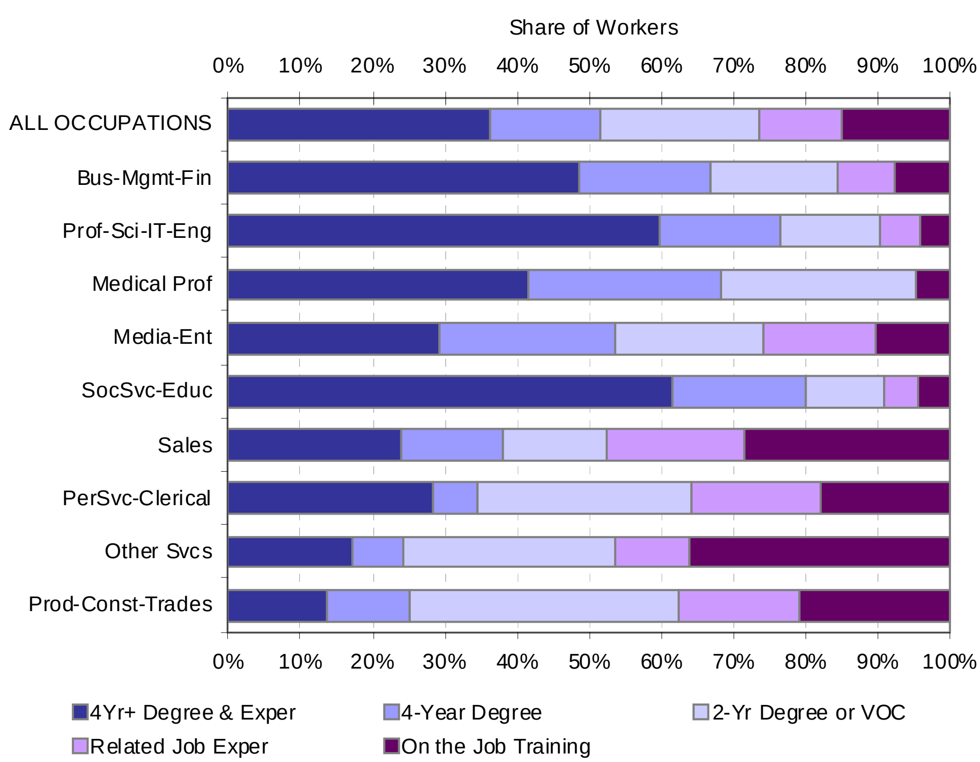
information technology is consistent with the larger industry group of which they are a part (Figure 25).

Figure 25
Worker Education-Skills for Selected Industries



Source: SCV-EDC 2012 Labor Market Survey. Note: Survey Respone [n=698]

Figure 26
Worker Education-Skills By Occupation



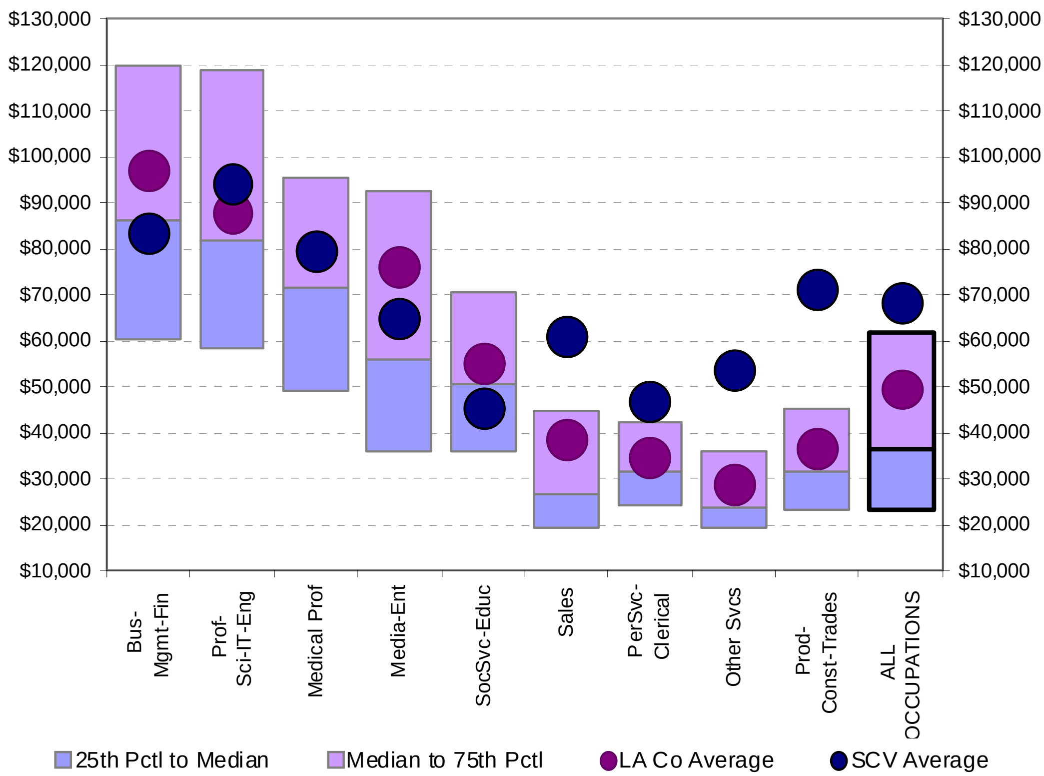
Source: SCV-EDC 2012 Labor Market Survey. Note: Survey Respone [n=694]

- Across all occupations, more than half of SCV workers are employed in jobs that require academic-based skills—college level education; and nearly one-half are employed in jobs that require experience-based skills—some college, vocational training, and on-the-job training (Figure 26).
- Employment occupations where the academic-based skills of SCV workers are most represented include social service & education—80%; scientific, information technology & engineering—76%; medical practices—68%; and business, management & finance—67% (Figure 26).

Workforce Wage Compensation

Labor compensation accounts for the single largest operating expense for the vast majority of businesses. Businesses face the dual challenge to having to offer competitive wages in order to attract qualified workers but also controlling labor cost in order to offer competitively-priced products and services. Workforce areas that deliver qualified labor at a cost-competitive wage represent an attractive opportunity for successful business operations.

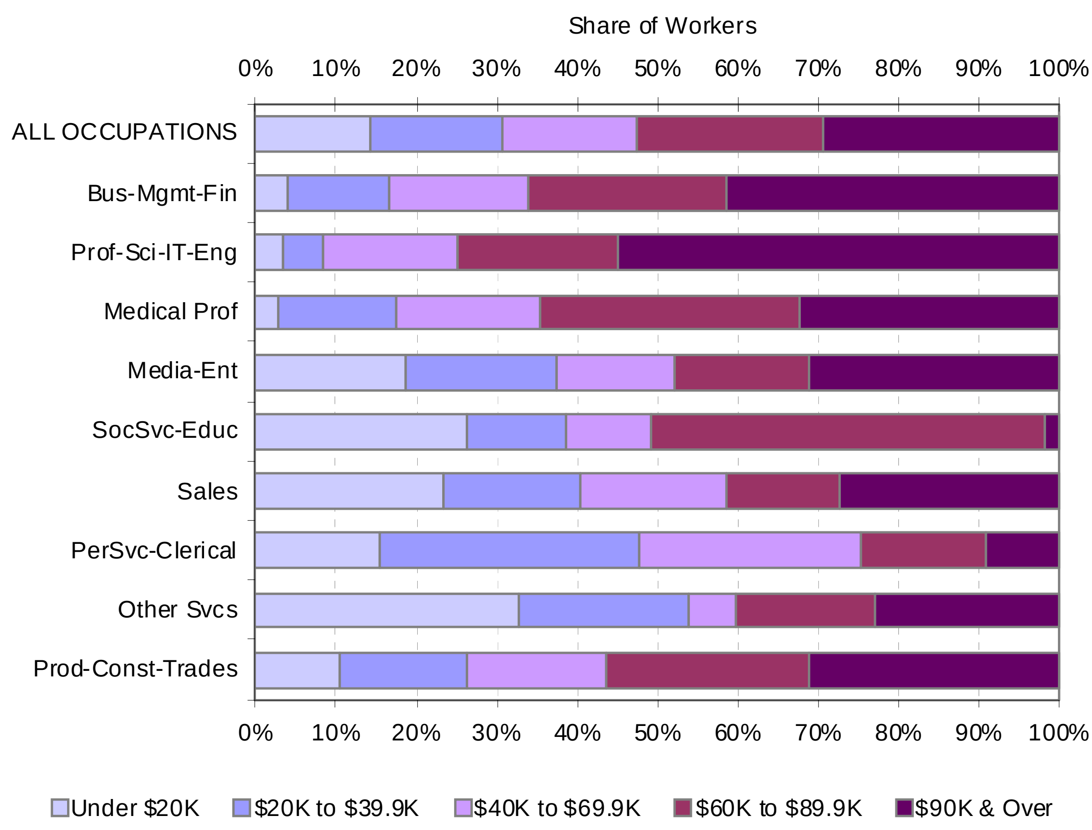
Figure 27
Santa Clarita Valley - Los Angeles County Wage Profile by Occupation



Source: CA-EDD Occupational Employment Statistics, 2010 Survey; SCV-EDC 2012 Labor Market Survey.

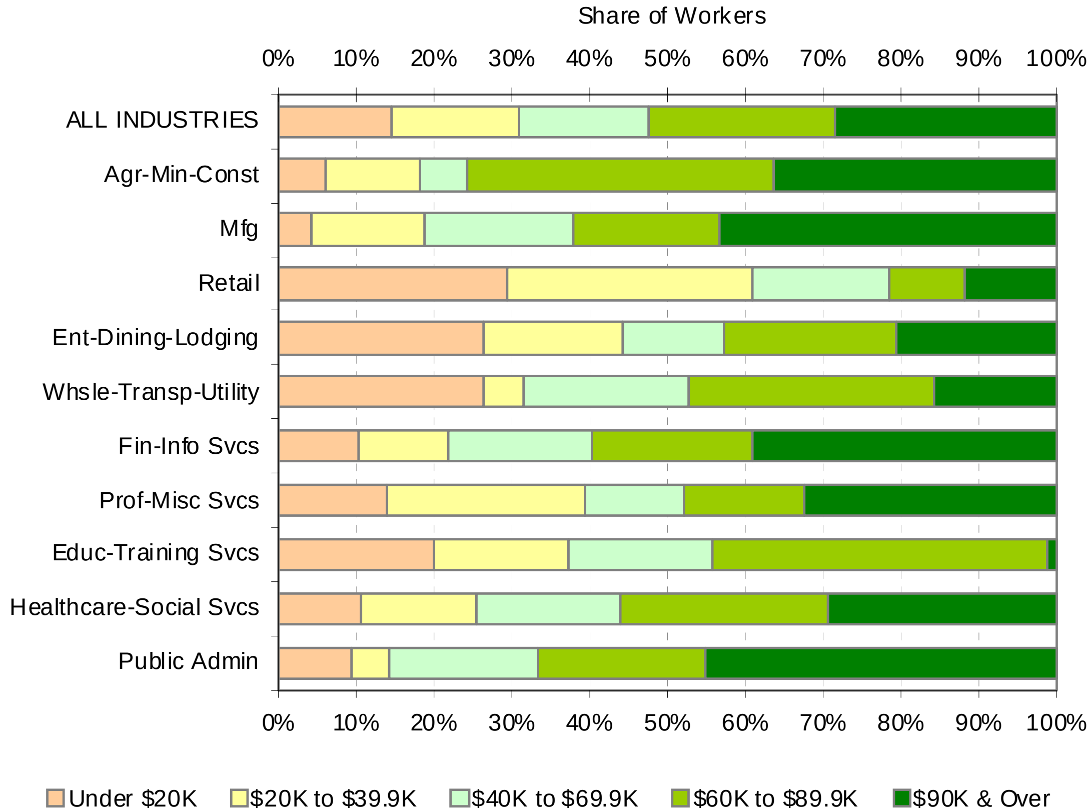
- For all occupations combined, the average annual wage of full-time SCV workers equates to roughly $68,200 per year (Figure 27). By comparison, the latest available occupation wage data for Los Angeles County indicates the average annual wage of all full-time workers was $49,600 in 2010. The high overall wage level that describes SCV workers is due to the very high share of workers employed in high-skill occupations.
- Average annual wages reported by SCV workers employed in academic-based skill occupations (management-finance, science-engineering, media, education, etc.) are actually very cost-competitive in relation to the corresponding wage level describing all of Los Angeles County (Figure 27).
- Average annual wages reported by SCV workers in experience-based skill occupations are relatively high in comparison to Los Angeles County and likely reflect high levels of job performance made possible with many years of job tenure and related work experience (Figure 27).
- For all occupations combined, about 30% of SCV workers earn more than $90,000 per year and an equal share earn less than $40,000 per year (Figure 28).
- Employment occupations that include the highest proportion of SCV workers earning over $90,000 per year reflect academic-based skill occupations, with the notable exception of social service and education jobs (Figure 28).

Figure 28
Worker Wage Range by Occupation



Source: SCV-EDC 2012 Labor Market Survey. Note: Survey Respone [n=601]

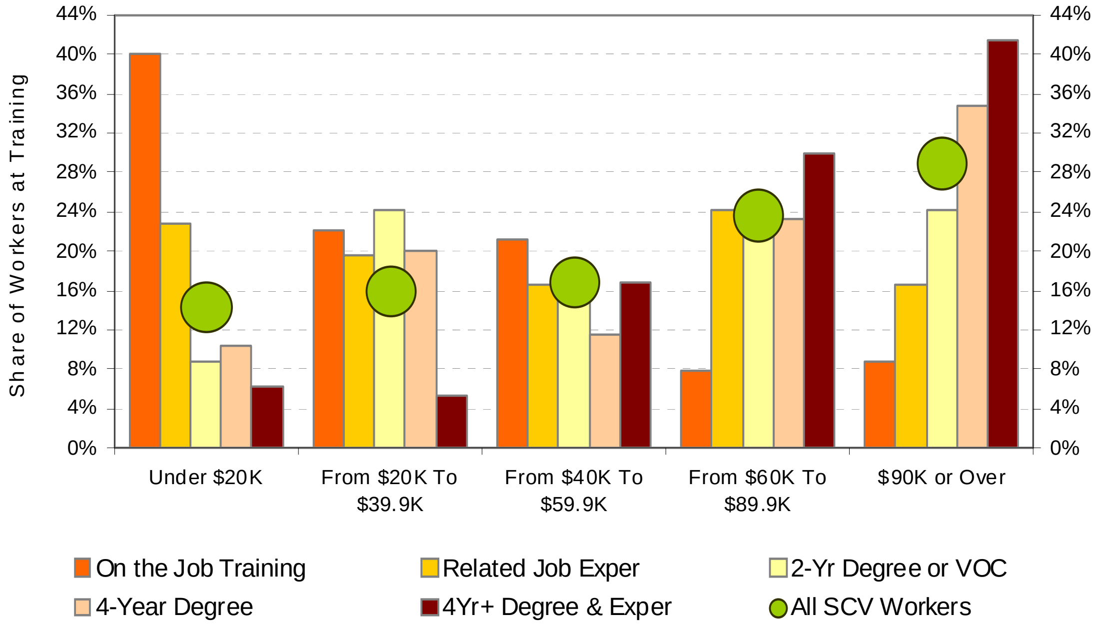
Figure 29
Worker Wage Range by Industry



Source: SCV-EDC 2012 Labor Market Survey. Note: Survey Respone [n=606]

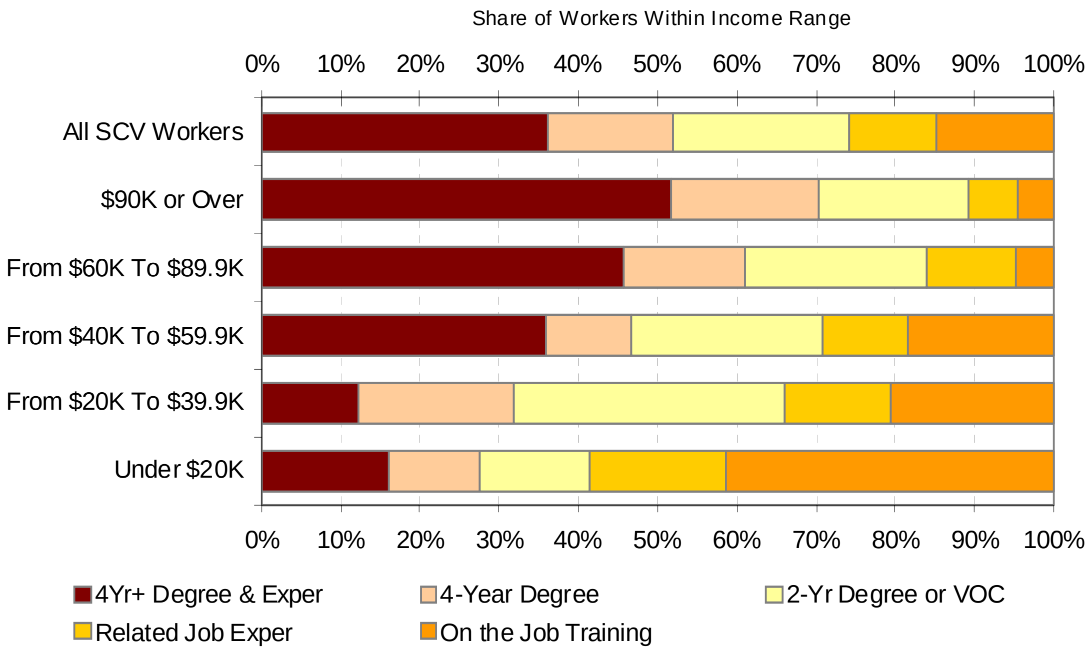
- Across all industries combined, about 30% of SCV workers are employed in full-time jobs that pay $90,000 per year and about 30% are employed in jobs that pay less than $40,000 per year (Figure 29).
- Industries that include the highest proportion of SCV workers that earn $90,000 per year or more include public administration—45%; manufacturing—43%, finance & information—39%; and construction trades—36% (Figure 29).
- A high proportion of SCV workers with a high level of academic training can be expected to fill jobs that pay $90,000 or more per year, and a high proportion of workers employed in jobs that only require on-the-job training can be expected to earn less than $20,000 per year (Figure 30 and Figure 31).

Figure 30
Worker Wage Range by Education-Skill Level



Source: SCV-EDC Labor Market Survey - 2012.   Note: Survey Respone [n=607]

Figure 31
Worker Education-Skill Level by Annual Wage Range

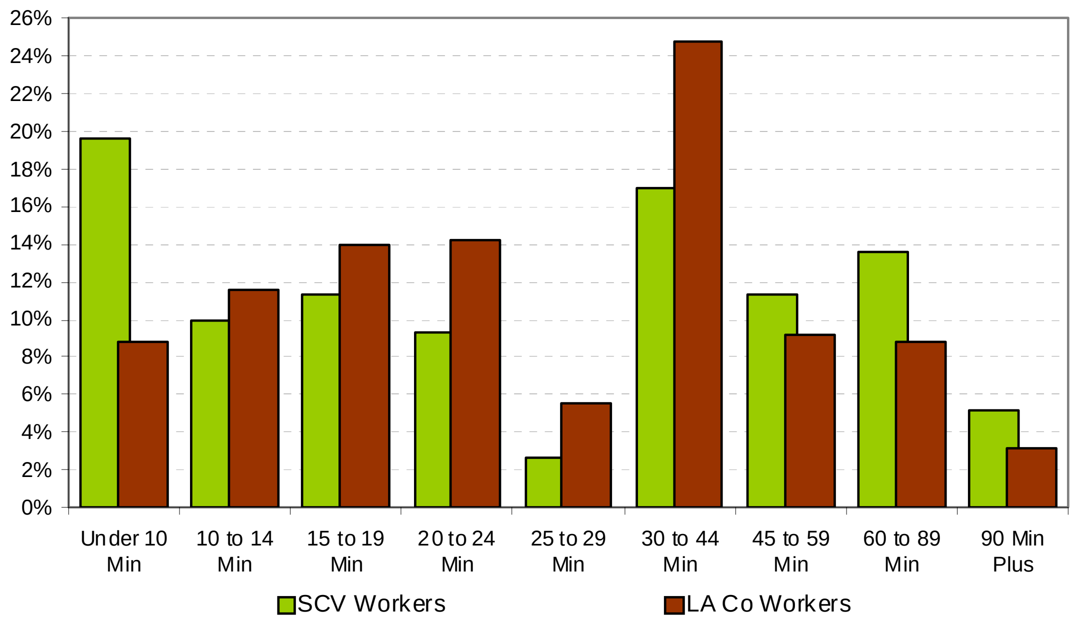


Source: SCV-EDC 2012 Labor Market Survey.   Note: Survey Respone [n=607]

Workforce Commuting

Commuters are recognized as workers who leave the SCV to travel to work. Workforce commuting is often viewed as a quality of life issue most commonly evaluated in term of jobs-housing balance. Theoretically, enough local area jobs should exist to employ the vast majority of workers residing in a given area. In reality, individual workers possess unique skills not uniformly demanded in all areas of a region. In short, some workforce commuting is inevitable if workers are to optimize earnings potential for the skill set they possess. Expanding the local base of employment through business growth serves to reduce inordinate levels of workforce commuting. In this regard, the commuting workforce itself represents a ready available resource that can fuel business relocation and expansion.

Figure 32
Santa Clarita Valley-Los Angeles County Work Commute Profile



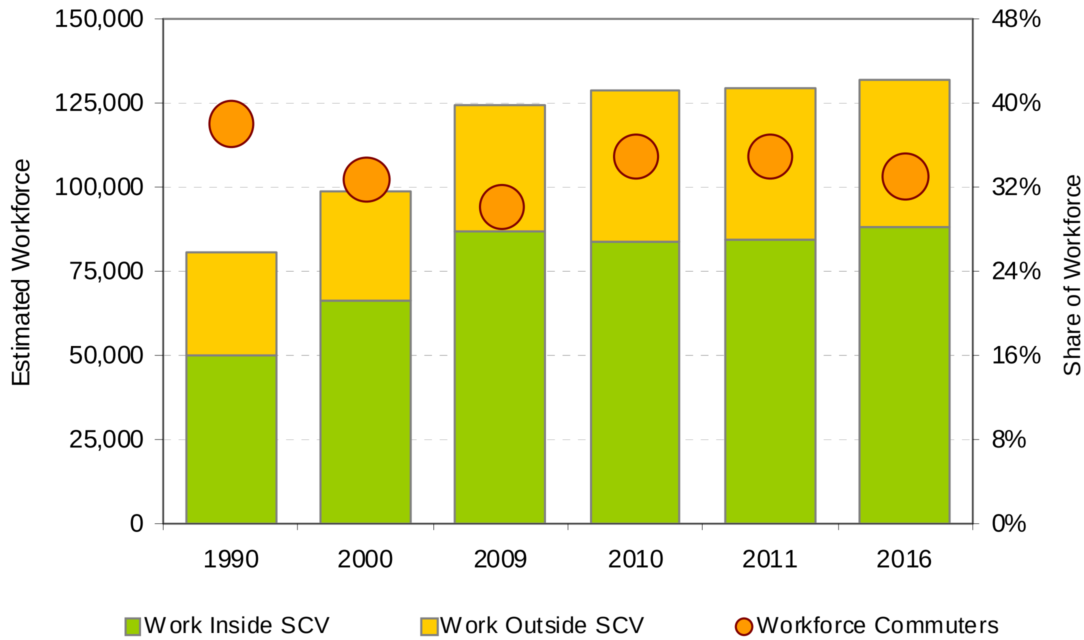
Source: American Community Survey 2005-09 Population Estimates; SCV-EDC Labor Market Survey - 2012.

- The travel time distribution that characterizes SCV and Los Angeles County can be generally divided into two groupings that include workers that travel less than 30 minutes and workers that travel 30 minutes or more to work (Figure 32).
- The 2012 survey of SCV households and Census based estimates for Los Angeles County, East SFV, and West SFV all reflect a consistent pattern where about 47% of workers travel less than 30 minutes and 53% of workers travel 30

minutes or longer (Figure 32). In this regard, the SCV is no different that the larger regional labor market of which it is a part.

- SCV worker travel times are most distinguished from surrounding areas such as East SFV and West SFV by a relatively large share of workers that travel less than 10 minutes but a relatively large share must endure travel times of 60 minutes or more (Figure 32).
- Results from the household survey suggest that roughly one-half of adult workers travel to a job location outside of SCV. Estimates based on American Community Survey data and special tabulations from the California Employment Development Department suggest the share of payroll and self-employed workers that travel to a job outside of the SCV is lower at roughly 35% in 2011 (Figure 33).

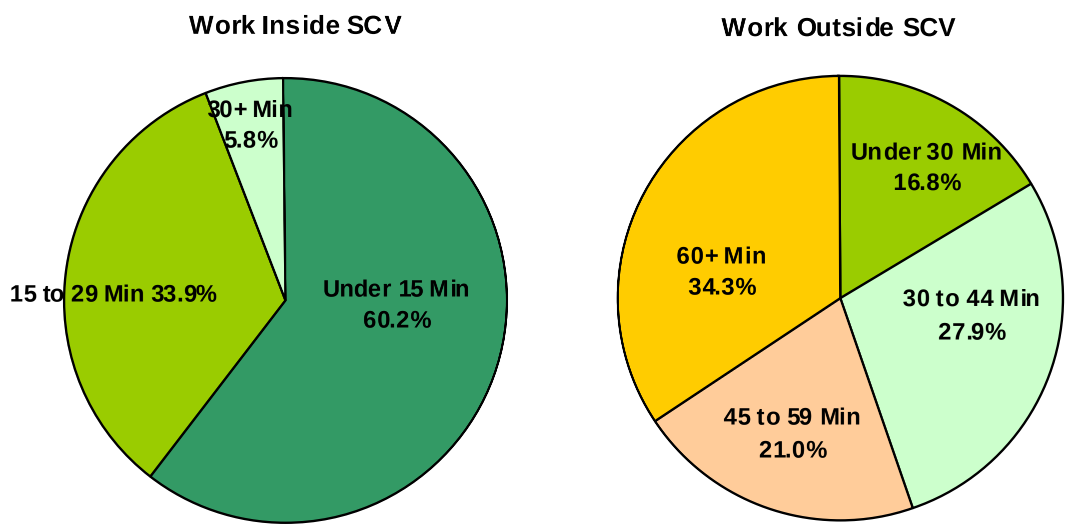
Figure 33
Simulation of Santa Clarita Valley Workforce Commuters



Source: ESRI ACS 2005-09 Pop-Report; ESRI 2010-11-16 Pop-Est; SCV-EDC Labor Market Survey-2012; SCV-EDC Monthly Economic Snapshots; AGA

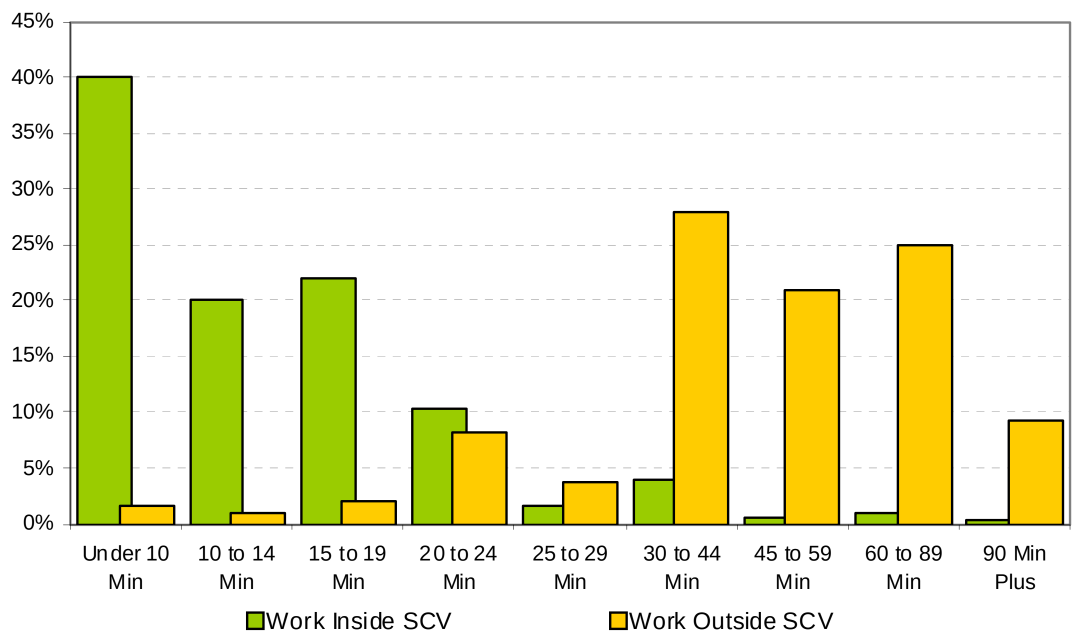
- Time spent traveling to work is distinctly different for adults that work inside the SCV and workforce commuters (Figure 34). Only 1 in 20 adults that work in the SCV must travel 30 minutes or more. By comparison, only 1 in 6 workforce commuters can reach their job in less than 30 minutes.
- About 60% of adults that work within the SCV spend less than 15 minutes traveling to work, while about 35% of workforce commuters spend at least 60 minutes traveling to work each way (Figure 35).

Figure 34
Worker Travel Time Comparison



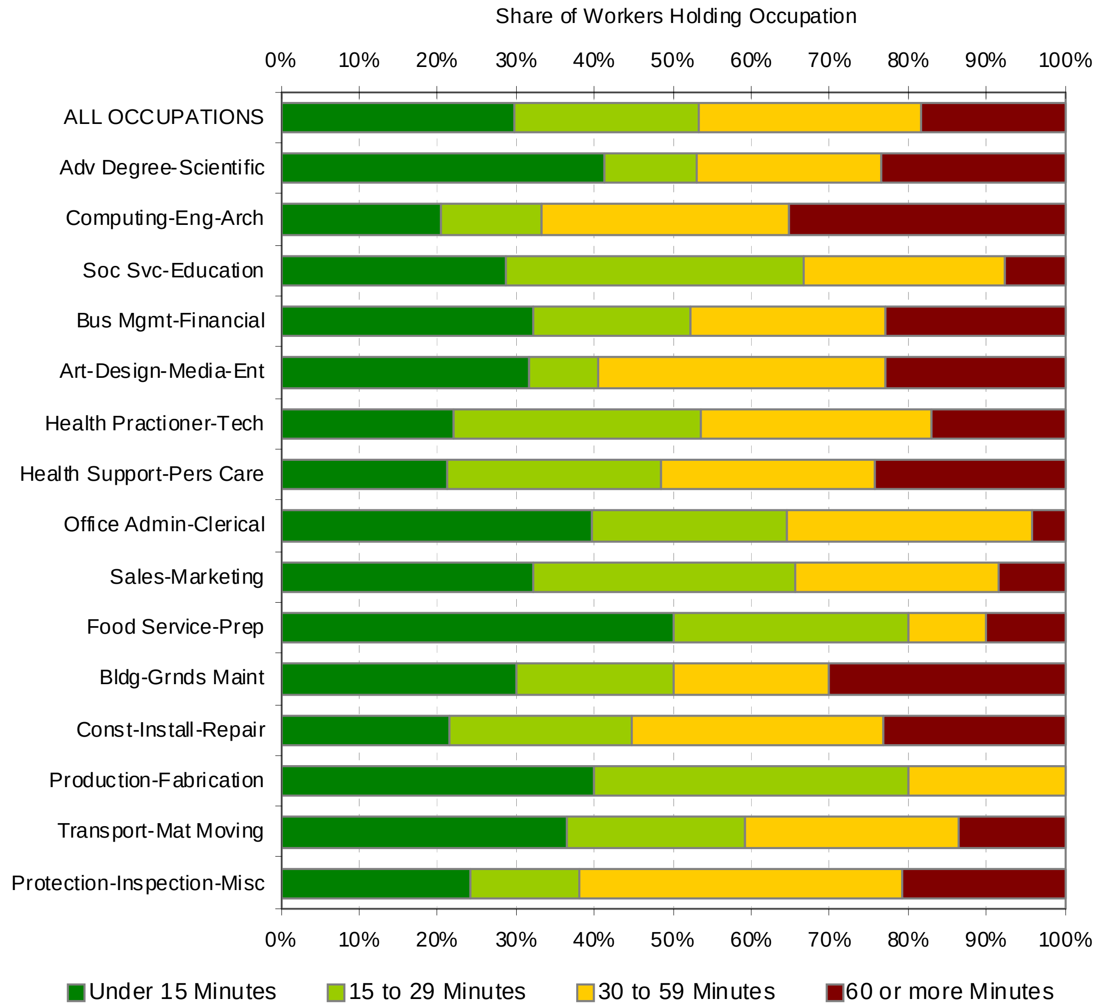
Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=713]

Figure 35
Worker Travel Time Distribution



Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=713]

Figure 36
Worker Commute Time (One-Way) By Occcupation

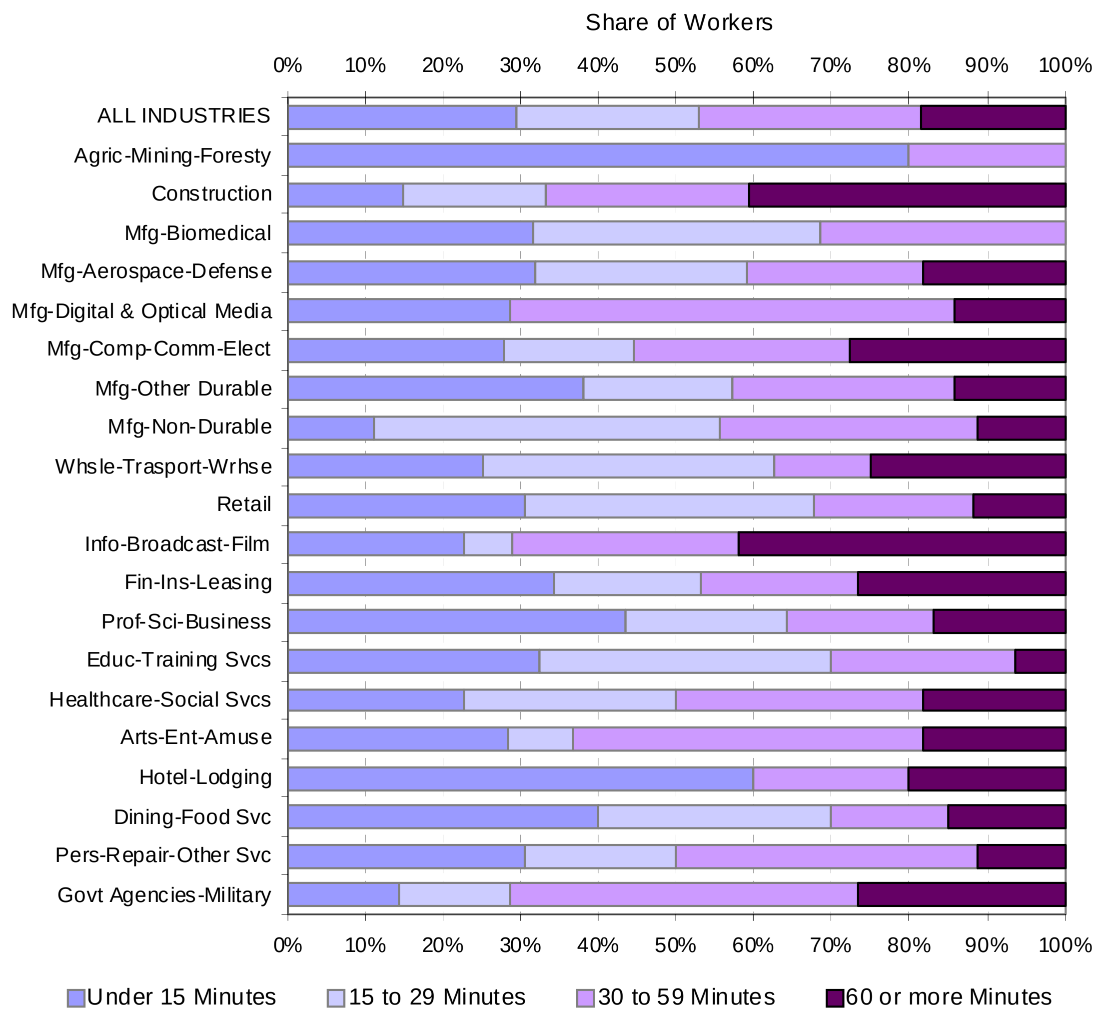


Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=691]

- Time spent traveling to work varies by worker employment occupation (Figure 36). Employment occupations where a large share of workers must commute 60 minutes or more include: computing, engineering, and architecture jobs—35%; buildings & grounds maintenance jobs—30%; health support & personal service jobs—24%; advance degree & scientific jobs—24%; and construction, installation, and repair jobs—23%.
- Time spent traveling to work varies by industry of employment (Figure 37). Industries that required a large share of SCV workers to commute 60 minutes or more include information, broadcasting, and film jobs—42%; construction jobs—41%; computer & electronics manufacturing jobs—28%; finance, insurance, and leasing jobs—27%; government agency jobs—27%; and warehouse & transportation jobs—25%.

Figure 37
Worker Commute Time (One-Way) By Industry



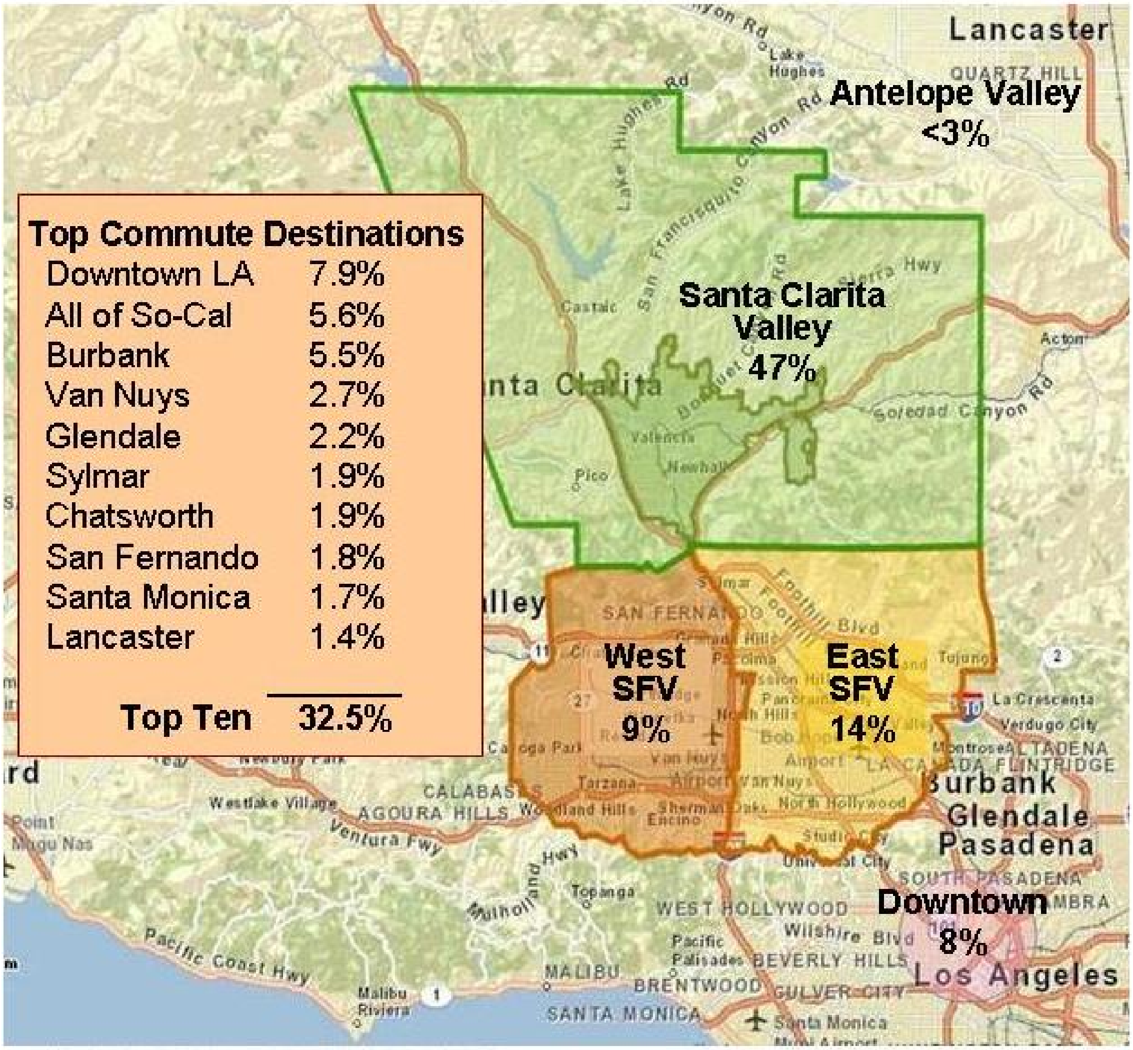
Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=697]

- Based on results from the household survey, roughly one-half of the workforce must travel to job locations outside of the SCV (Figure 38).
- Roughly one-half of workforce commuters travel to a job location in either the East SFV or the West SFV (Figure 38). The vast majority of these workforce commuters report overall travel times of less than 60 minutes (Figure 38).
- Beyond the San Fernando Valley, the travel destination identified by workforce commuters is widely dispersed throughout the greater Los Angeles County area, with the exception of Downtown Los Angeles (Figure 38).

- The top ten work destinations outside of the SCV account for about one-third of all working adults and about two-thirds of workforce commuters (Figure 38).

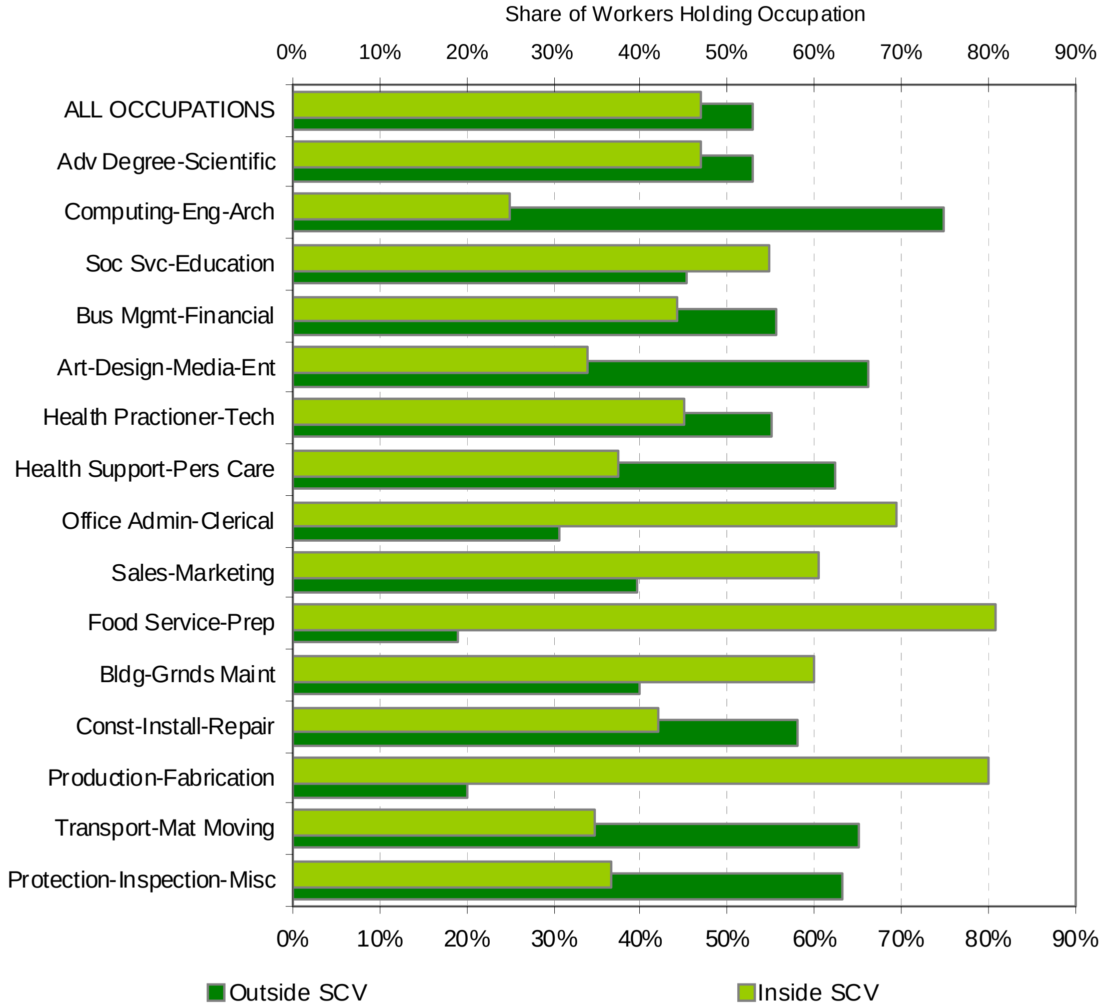
Figure 38
Santa Clarita Valley Worker Travel Destinations



Source: ESRI;; SCV-EDC Labor Market Study - 2012

- Work commuters represent labor skills that leave the SCV but could provide immediate and near-term support for business relocation and growth. Several employment occupations are characterized by a relatively large share of adults working outside of the SCV (Figure 39).
- Employment occupations that include a high share of workforce commuters include: computing, engineering, and architecture jobs—75%; art, design, digital media, and entertainment jobs—66%; transport and materials moving jobs—65%; public protection and inspection jobs—63%; health support and personal service jobs—63%; and construction, installation, and repair jobs—58% (Figure 39).

Figure 39
Worker Commute Destination by Employment Occupation

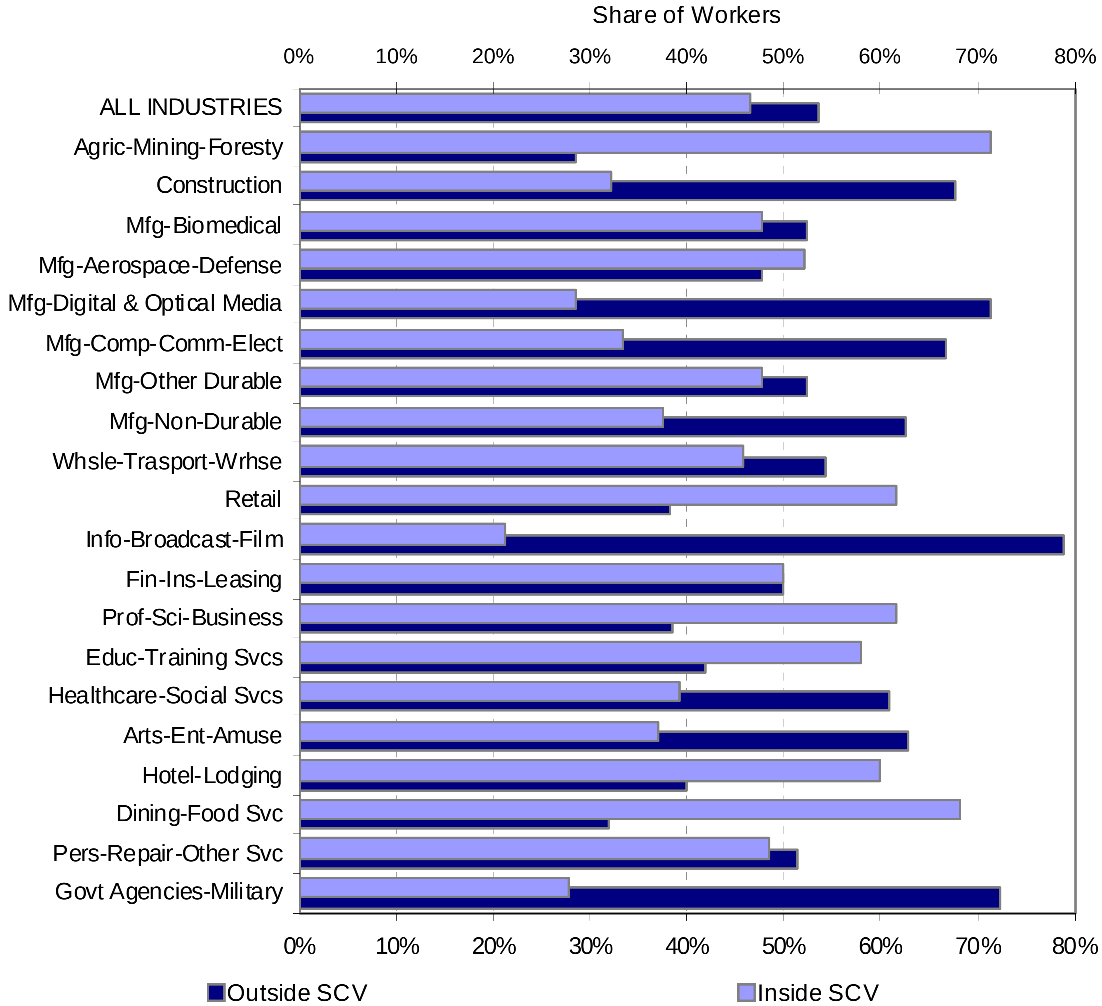


Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=703]

- Work commuters also represent industry experience that leaves the SCV but could provide immediate and near-term support for business relocation and growth. Several industries employ a relatively large share of adults working outside of the SCV (Figure 40).
- Industries that employ a high share of SCV workforce commuters include: information, broadcast, and film companies—79%; government agencies—72%; digital & optical media manufacturing firms—71%; construction firms—68%; art, media, and entertainment firms—63%; non-durable manufacturing firms—63%; and healthcare and social service firms—61% (Figure 40).

Figure 40
Worker Commute Destination by Employment Industry

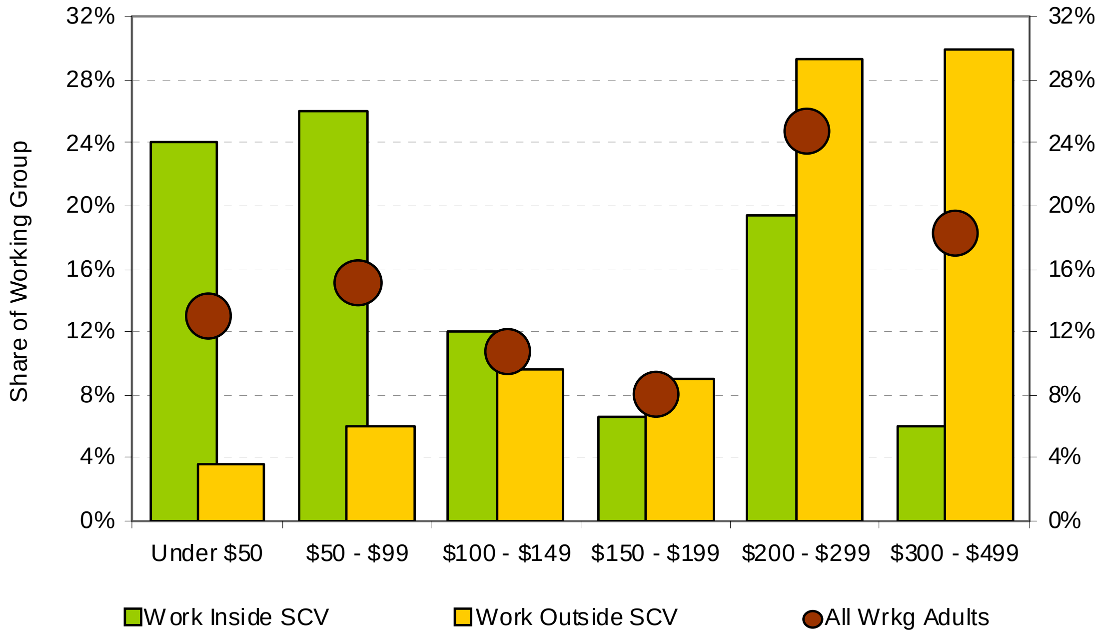


Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=708]

- SCV workforce commuters not only endure protracted periods away from home but also incur added costs associated with travel to work (Figure 41).
- Nearly 30% of workforce commuters report spending $300 to $500 per month in travel cost, including fuel, tolls, and/or parking (Figure 41). By comparison, less than 6% of adults working within the SCV report the same level of work-related travel cost.
- About 50% of adults that work in the SCV report spending less than $100 per month in travel cost to and from work, while nearly 60% of workforce commuters spend $200 or more per month in travel cost (Figure 41).

Figure 41
Monthly Commute Cost for Working Adults



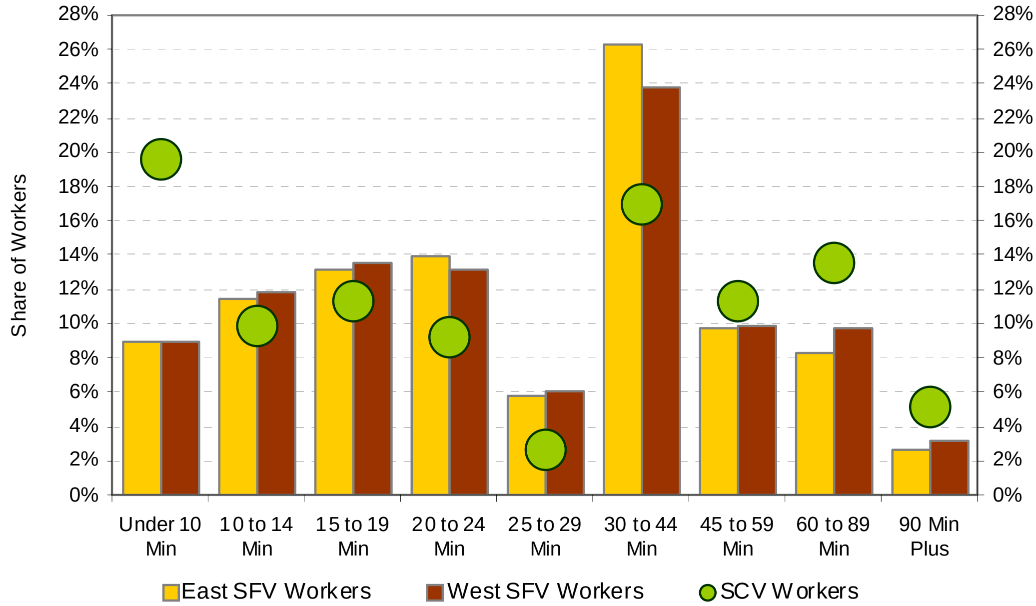
Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=322]

San Fernando Valley Commuter Potential

Rapid and sustained business growth within the SCV is not only dependent on providing workforce commuters with local job opportunities but also attracting workers that currently reside outside of the SCV. The relatively modest size of the labor pool in the SCV (roughly 130,000 workers) and the academic-skill focus of existing workers provide a good indication not all labor requirements of business growth can be completely satisfied from within the SCV. Future demand will exist for experienced-based work skills strongly represented in surrounding areas such as the SFV.

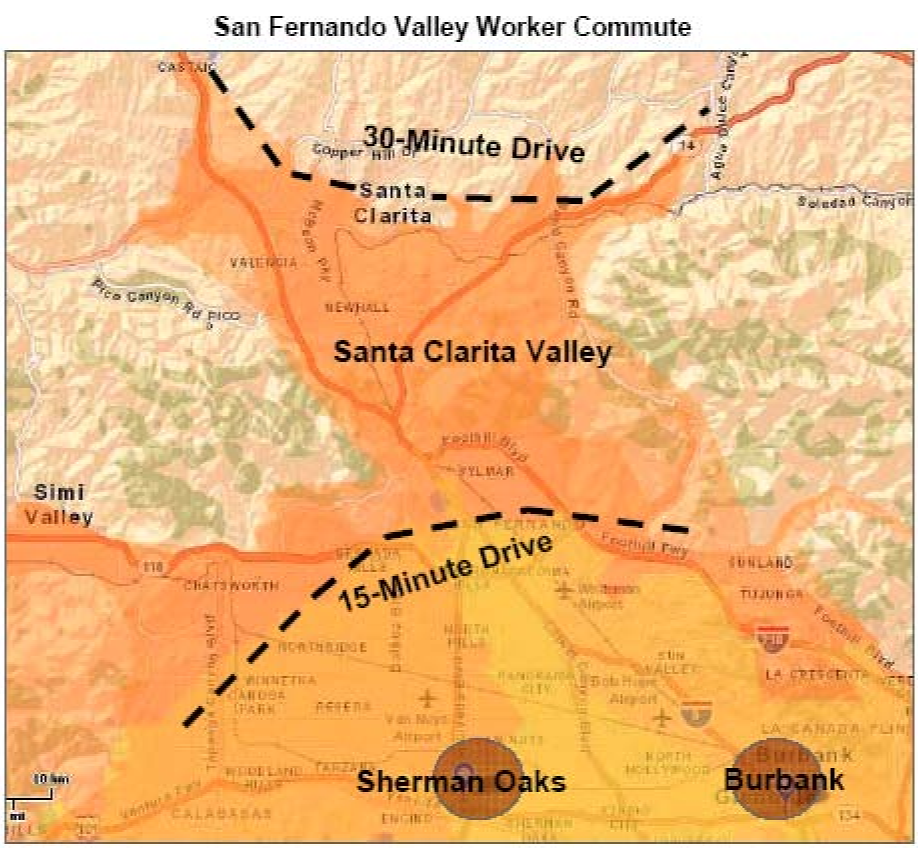
- About 47% of all workers that reside in East SFV or West SFV travel at least 30 minutes to get to work, which compares directly with the SCV (Figure 42). In addition, roughly 20% of workers throughout the SFV travel at least 45 minutes to get to work.
- The maximum travel time from most locations throughout the SFV to all locations within the urbanized portion of the SCV ranges from 15 to 30 minutes (Figure 43).
- Future employment opportunities in the SCV represent a significant reduction in overall work travel for a minimum of 1 out of every 5 of the 750,000 workers that reside in the SFV (Figure 42 and Figure 43).

Figure 42
Santa Clarita Valley-San Fernando Valley Work Travel Time



Source: American Community Survey 2005-09 Population Estimates; SCV-EDC Labor Market Survey - 2012.

Figure 43

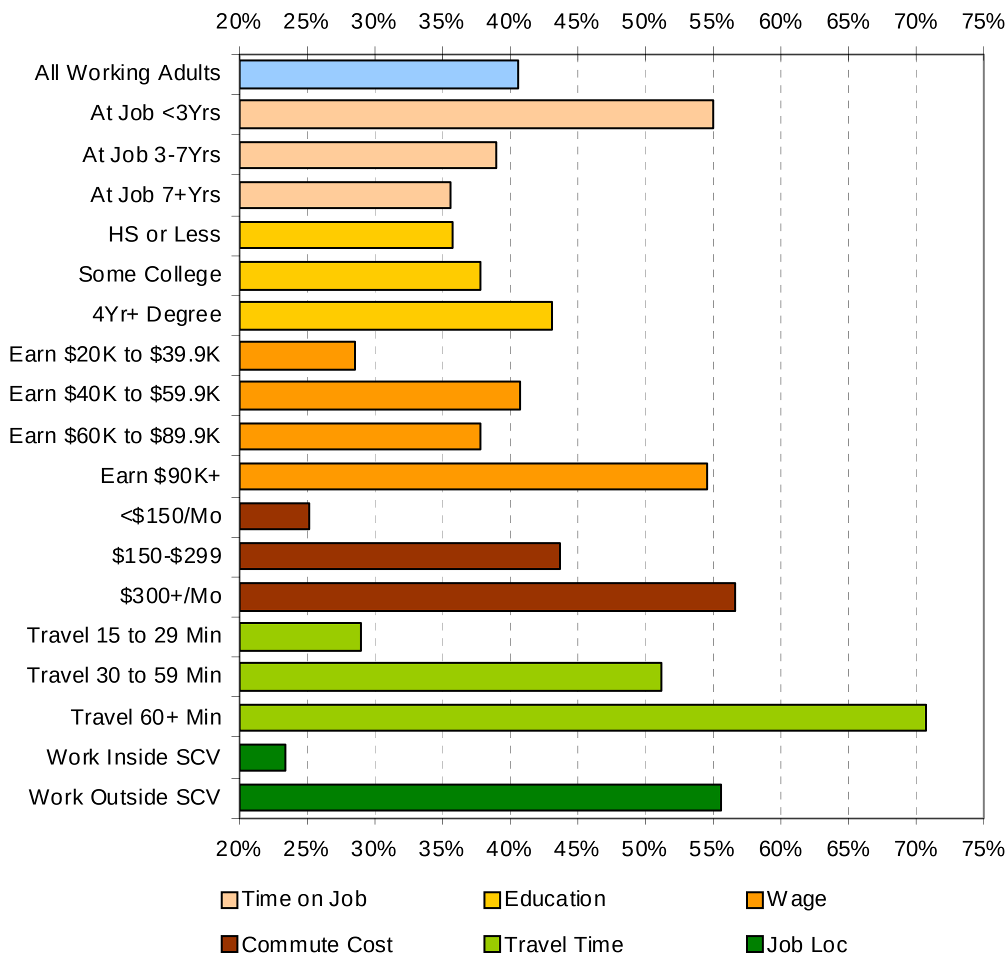


Source: ESRI Drive Time Analysis; AGA

Workforce Pay Sensitivity

To optimize earning potential, about 30% of SCV workers must endure long work commutes requiring a minimum of 45 minutes of one-way travel to get to work. About 30% of SCV workers also incur a minimum of $200 per month in work-related travel cost. By comparison, SCV business growth is dependent on providing an ample supply of well-qualified and competitively-priced workers. To test the potential for reducing workforce commuting and providing operating advantages to prospective businesses, household survey respondents were asked to identify the share of current wages they would be willing to forego if offered a similar job that greatly reduced work travel time and associated cost.

Figure 44
Worker Acceptance of Pay Reduction for Local Employment

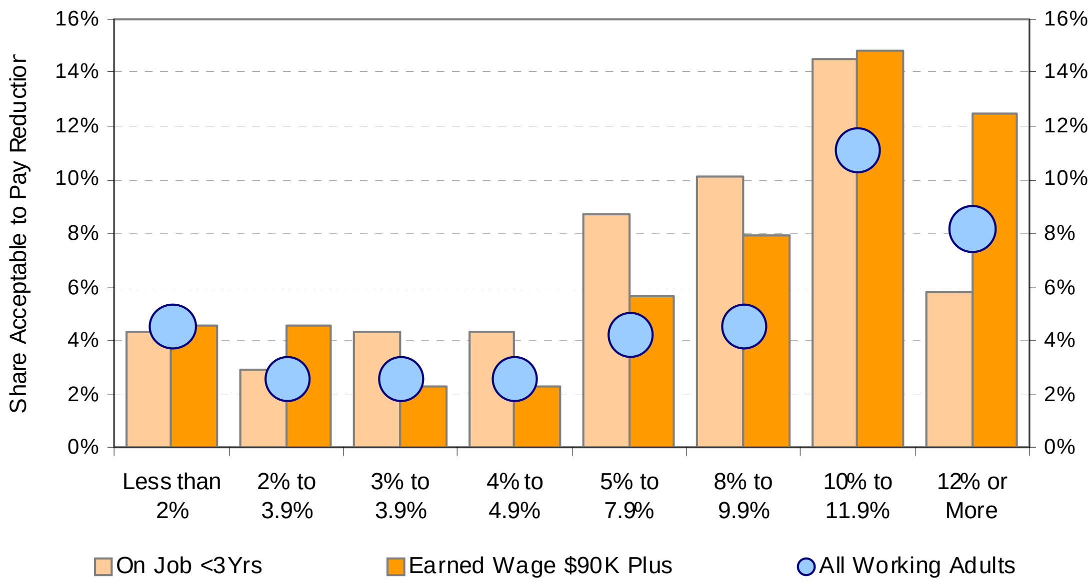


Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=305]

- Overall, only 2 out of every 5 SCV workers indicate any willingness to accept a lower wage in return for a shorter commute and lower commute cost (Figure 44).
- Expressed willingness to accept a lower wage is most prevalent among workers that have been on their current job less than 3 years—55%; workers earning $90,000 or more per year—55%; workers whose job is located outside of the SCV—56%; workers spending a minimum of $300 per month in travel cost—57%; and workers that spend 60 minutes or more traveling to work—71% (Figure 44).

Figure 45
Limits of Pay Reduction By Selected Job Tenure-Wage Characteristics

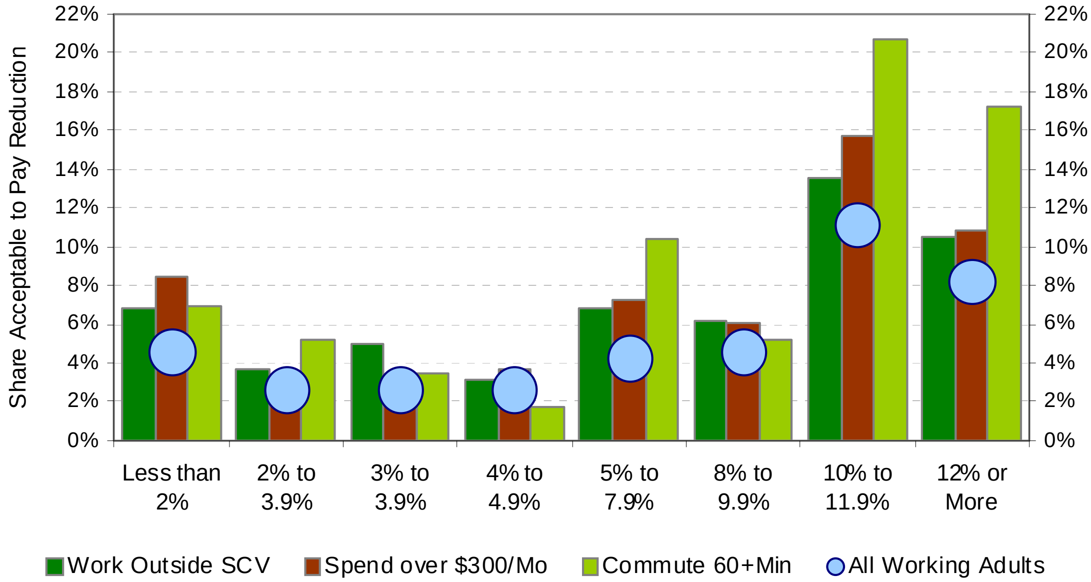


Note: Share only describes workers indicating a willingness to accept lower pay to reduce commute.

Source: SCV-EDC Labor Market Survey - 2012. Note: Survey Respone [n=124]

- Worker sensitivity regarding the maximum wage reduction that is acceptable varies among workers sharing similar work or travel experience (Figure 45). A wage reduction in the 10% to 12% range appears to be acceptable to the largest share of workers (about 1 out of 7) on the job less than 3 years or earning at least $90,000 per year. Workers who earn at least $90,000 per year are more willing to accept a wage reduction in excess of 12% than is true for workers on the job less than 3 years.
- A wage reduction in the 10% to 12% range appears to be acceptable to the largest share of workers that travel to a job outside the SCV, spend at least $300 per month in travel cost, or travel a minimum of 60 minutes each way to work (Figure 46).
- Overall, about 33% of workers who commute to jobs outside of the SCV and are willing to accept a wage reduction also indicate the 1% to 5% range as the maximum acceptable reduction; 23% indicate the 5% to 10% range as the maximum acceptable; but 40% indicate a reduction exceeding 10% as acceptable if work travel time and commute cost are significantly reduced (Figure 47).

Figure 46
Limits of Pay Reduction By Selected Commute Characteristics

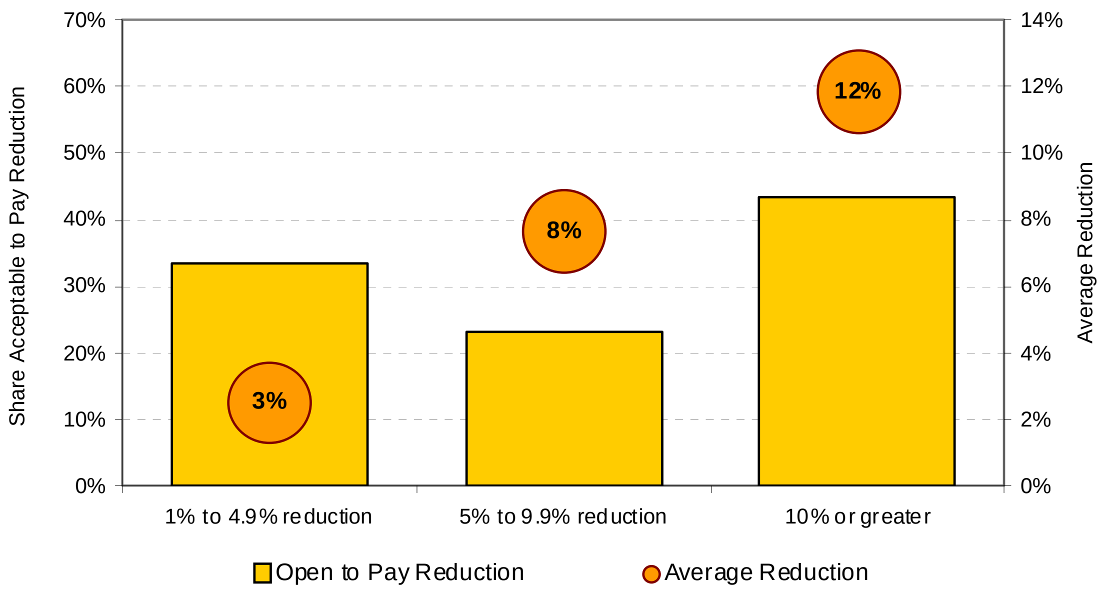


Note: Share only describes workers indicating a willingness to accept lower pay to reduce commute.

Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=124]

Figure 47
Share Working Outside SCV Open to Pay Reduction



Note: Share only describes workers indicating a willingness to accept lower pay to reduce commute.

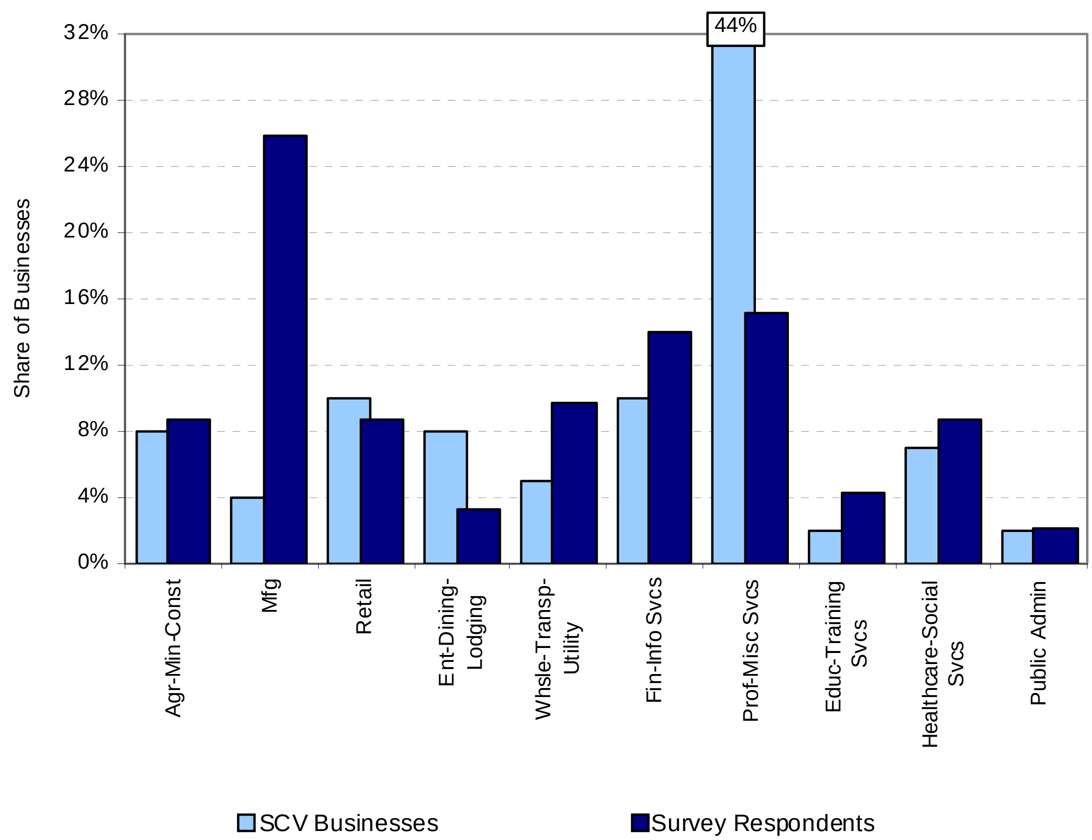
Source: SCV-EDC Labor Market Survey - 2012.

Note: Survey Respone [n=124]

Business Perspectives and Skill Demands

As a complement to the survey of SCV households, area businesses were also invited to participate in a web-based survey. The survey solicited input about factors expected to significantly benefit or challenge business growth over the next two years and also labor skills that would be most beneficial to business operations. A series of follow-up face-to-face interviews were also conducted to solicit qualitative input related to the survey results.

Figure 48
Santa Clarita Valley Business Mix and Survey Response Mix

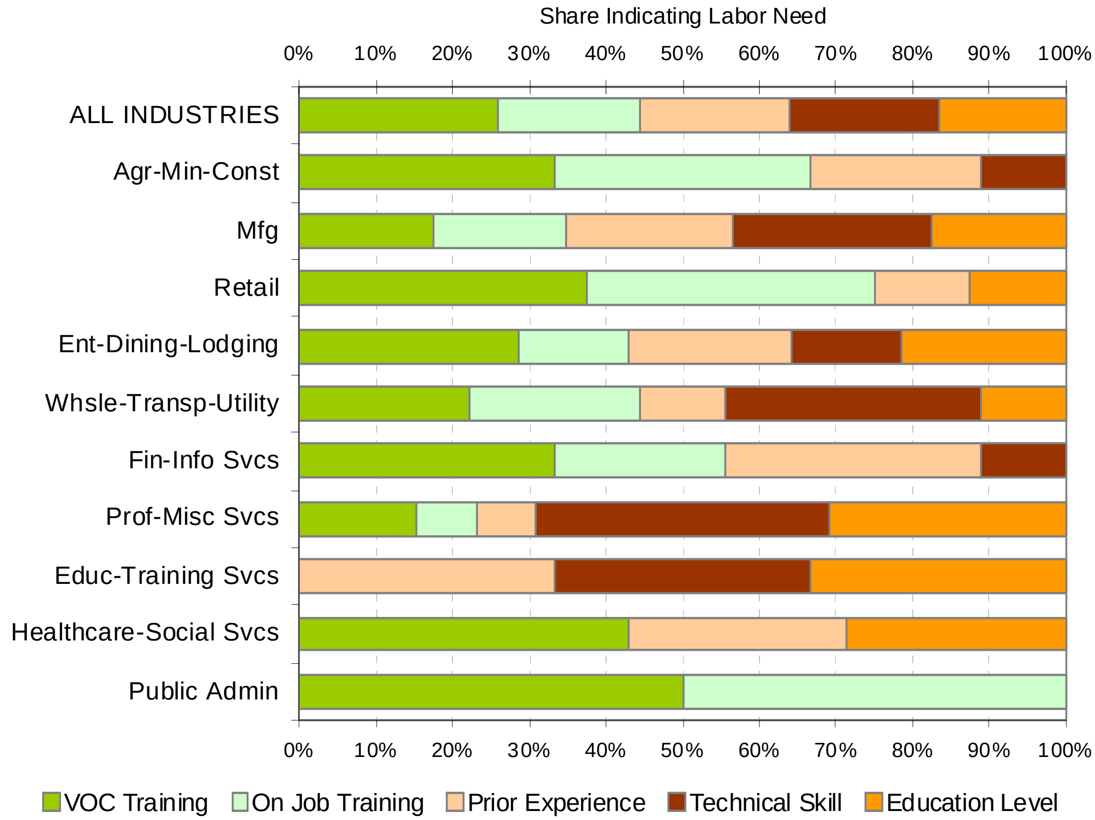


Source: SCV-EDC Monthly Economic Snapshot; 2012 Business Survey. Note: Survey Response [n=108]

- The mix of businesses participating in the web-based survey generally reflects the mix of SCV businesses except that manufacturing firms accounted for an relatively large share of responses and professional-business firms (law firms, engineering firms, etc.) and personal service firms (hair salons, repair shops, etc.) accounted for a relatively small share of responses (Figure 48).

The availability of qualified workers is integral to business relocation and expansion within the SCV. Businesses were asked to identify the labor skill that would most benefit their organization over the next two years.

Figure 49
Type of Labor Training-Skill In Demand by Industry

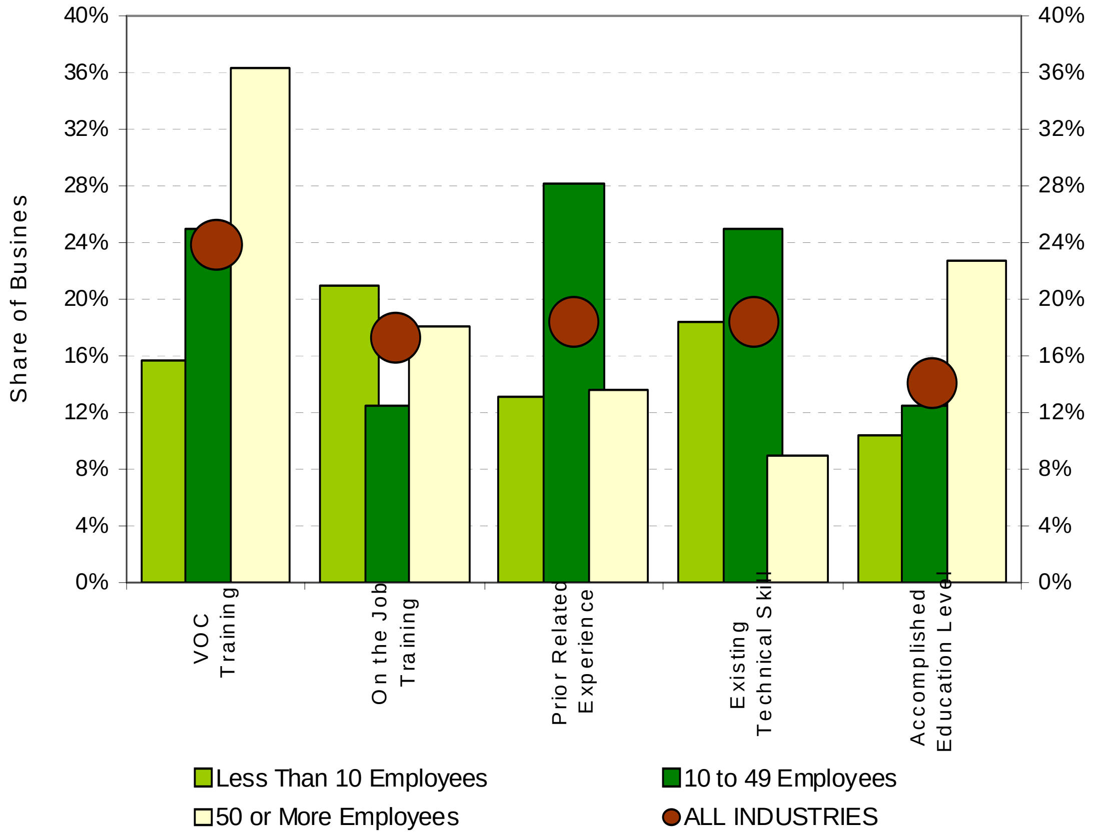


Source: SCV-EDC 2012 Business Labor Survey

Note: Survey Respone [n=93]

- The mix of labor skills identified as being most beneficial to a given business over the next two years generally falls into three general classifications—training-based skills (vocational or on-the-job); job-related existing skills (prior related experience or job-related technical skill); and education (ranging from basic literacy to a college education). For all industries combined, about 45% of labor skills in demand are training-based skills; about 40% are job-related existing skills; and about 15% are education-based skills (Figure 49).
- Education-based skills are most in demand by firms involved in education & training—33%; professional services—31%; and healthcare & social services—29% (Figure 49). By comparison, training-based skills are most in demand by firms involved in public administration—100%; retailing—75%; construction—67%; and financial & information services—55%.

Figure 50
Type of Labor Training-Skill In Demand by Size of Business



Source: SCV-EDC 2012 Business Labor Survey

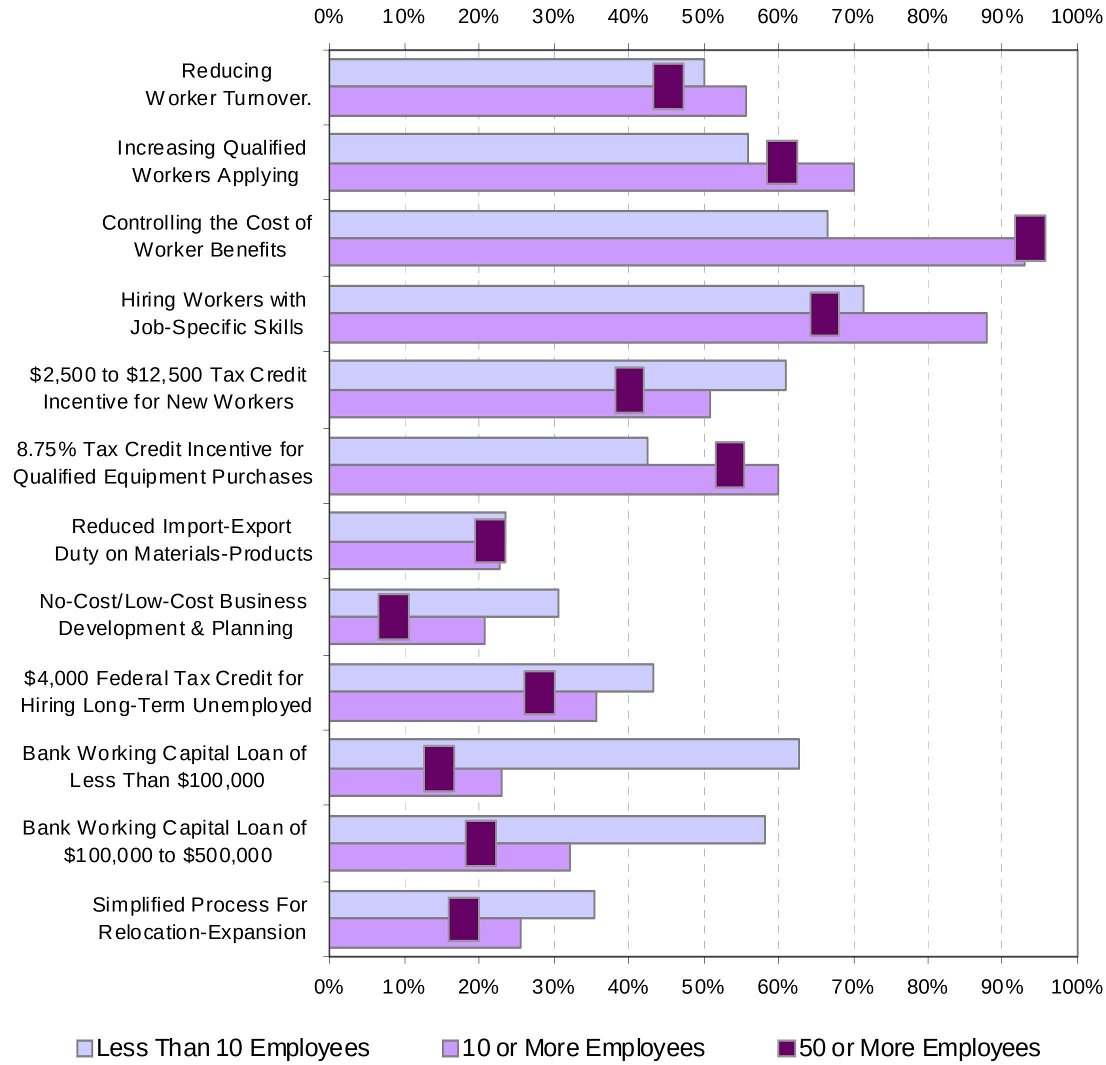
Note: Survey Respone [n=93]

- Labor skills that are in demand vary by industry group and by size of firm (Figure 50). Vocational training represents the kind of labor skill most often identified by all survey respondents regardless of business size—24% of all respondents.
- Vocational training is most in demand among larger firms employing 50 or more workers—36%, as is demand for education based skills—23% (Figure 50).
- Over 50% of businesses with 10 to 49 employees identify prospective workers that already have job-related skills as being most in demand (Figure 50).

Area businesses must contend with a multitude of operating factors in order to successfully compete and grow. Area businesses were asked to identify the relevance and importance of several operating factors and the effect on their respective organization in order to gauge the extent labor and non-labor issues merit careful consideration and program planning on the part of the Santa Clarita Valley Economic Development Corporation.

Figure 51
Factors Benefiting Smaller and Larger Businesses Over Next Two Years

Business Operating Factor	Businesses Ranking Factor As Significant or Crucial Benefit



Survey Question:

How would you rank each of the following factors as an operating benefit to the growth of your business over the next 2 years?

Note: Survey Respone [n=108]

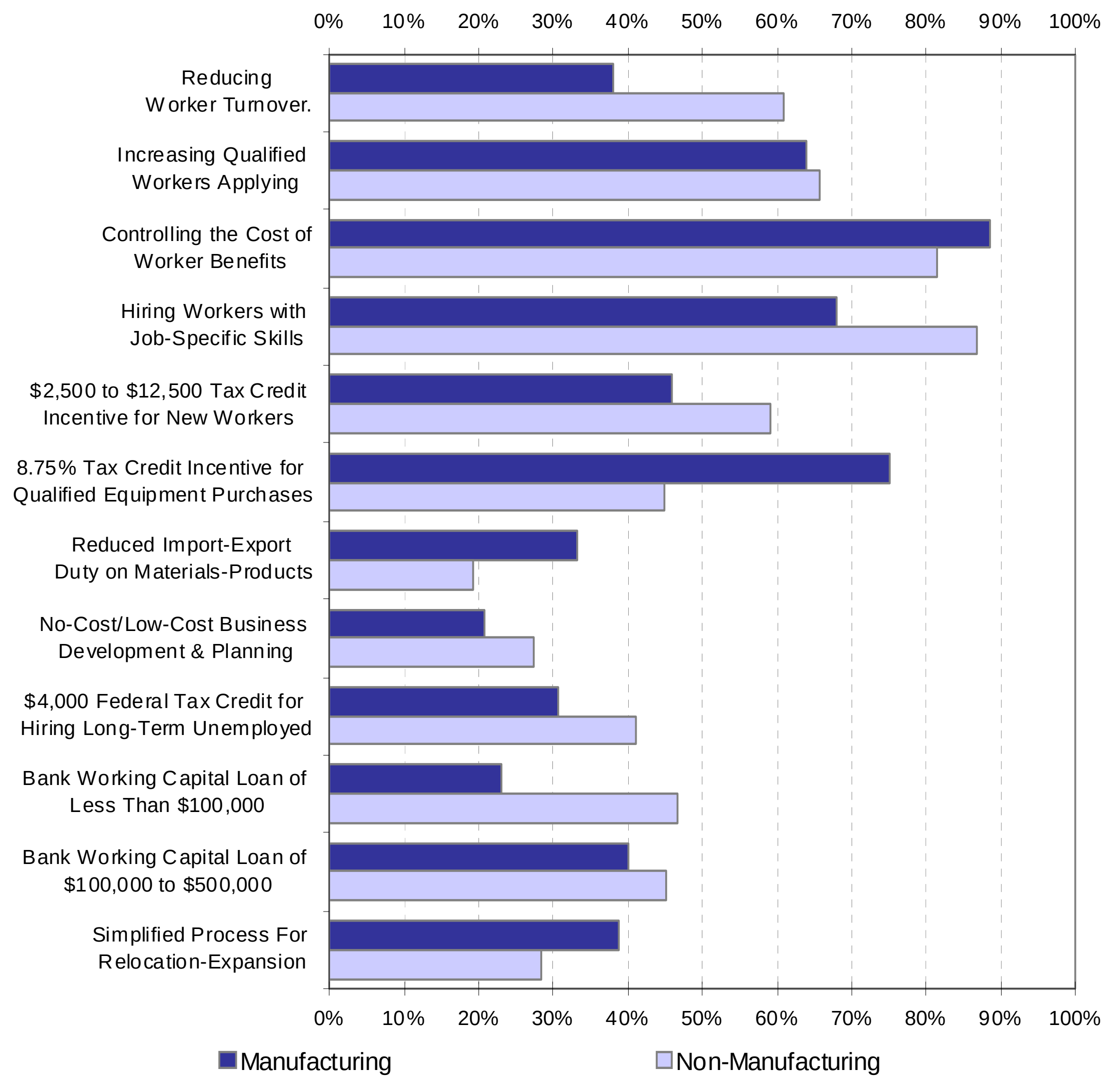
- Area businesses were asked to rank a variety of factors as either providing: no real benefit; limited benefit, significant benefit, or a crucial benefit to operating growth over the next two years. The relative importance assigned to numerous operating factors varied according to the size of the firm (Figure 51).
- Labor-related factors such as reducing worker turnover, increasing the supply of qualified applicants, finding workers with relevant job skills, and controlling the cost of worker benefits represented a significant or crucial benefit for a majority of businesses regardless of size (Figure 51).

- Being able to control the cost of worker benefits ranked as a significant or crucial benefit for more than 90% of firms employing 50 or more workers. By comparison, getting access to working capital ranked as a significant or crucial benefit for 60% of firms with fewer than 10 employees (Figure 51).
- Manufacturing firms tend to assign different relevance and import to non-labor factors than is true of all area businesses in general (Figure 52). About 75% of manufacturing firms ranked sales and use tax credits for qualified capital equipment purchases as a significant or crucial benefit.

Figure 52

Factors Benefiting Mfg & Non-Mfg Businesses Over Next Two Years

Business Operating Factor	Businesses Ranking Factor As Significant or Crucial Benefit



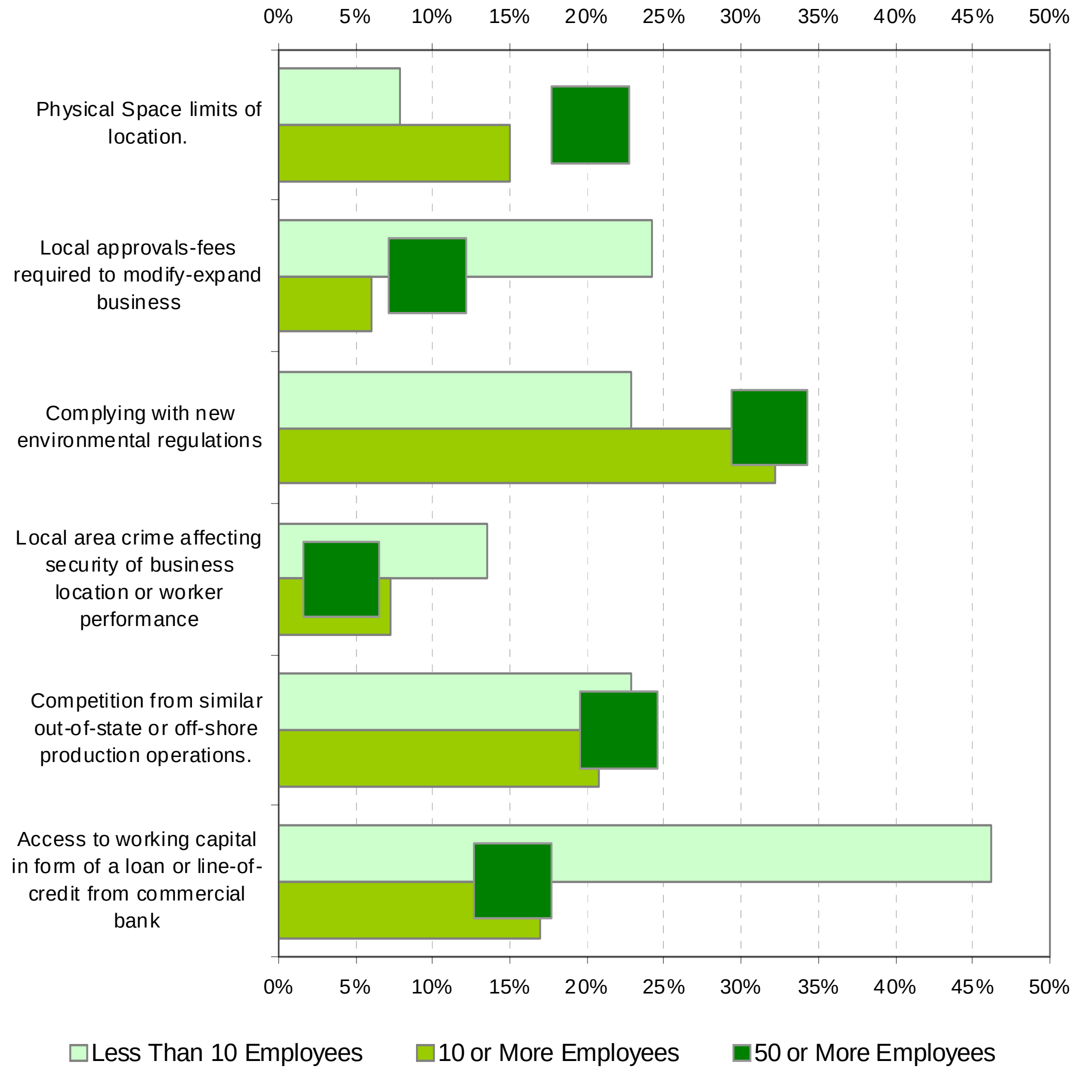
Survey Question:

How would you rank each of the following factors as an operating benefit to the growth of your business over the next 2 years?

Note: Survey Respone [n=108]

Figure 53
Factors Challenging Smaller and Larger Businesses Over Next Two Years

Business Operating Factor	Businesses Ranking Factor As Critical-External Threat



Survey Question:
How would you rank each of the following factors as an operating challenge to the growth of your business over the next 2 years?

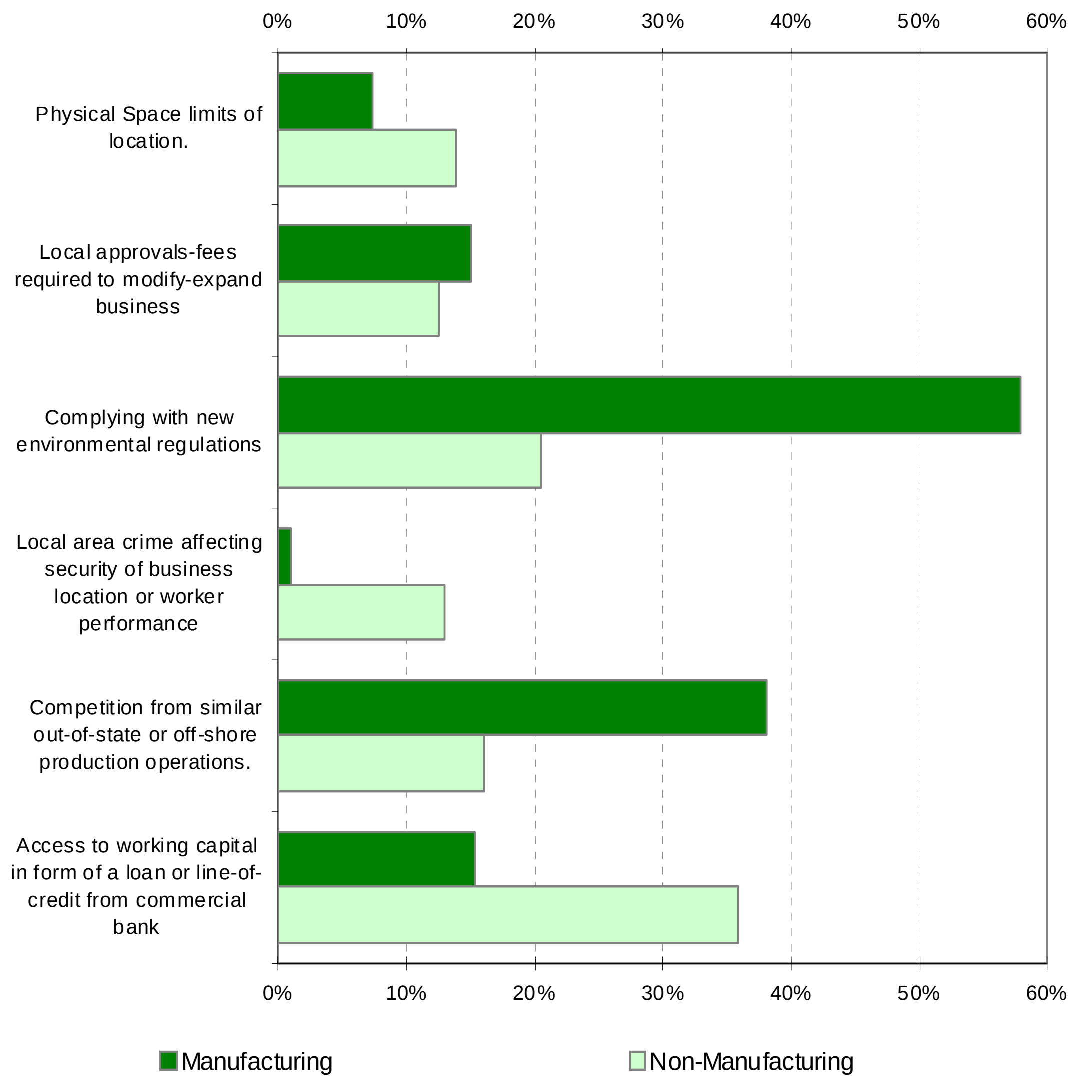
Note: Survey Respone [n=106]

- Area businesses were asked to rank a variety of factors as either representing: no real challenge; a manageable challenge, a costly but manageable challenge, or a critical challenge-external threat to operations over the next two years (Figure 53).
- About one-third of all firms with 10 or more employees identified compliance with environmental regulations as a critical challenge-external threat to operations (Figure 53). Nearly one-half of smaller firms with less than 10 employees consistently identified the lack of access to working capital as a critical challenge-external threat to operations primarily due to the cash-flow burden created.

- Nearly 60% of manufacturing firms identified compliance with new environmental regulations as a critical challenge-external threat, while about 40% of manufacturing firms identified competition from offshore operations as a critical challenge-external threat.
- Independently, most businesses identify the general state of the economy and high corporate tax structure in California as serious challenges to business growth over the next two years.

Figure 54
Factors Challenging Mfg & Non-Mfg Businesses Over Next Two Years

Business Operating Factor	Businesses Ranking Factor As Critical-External Threat



Survey Question:
How would you rank each of the following factors as an operating challenge to the growth of your business over the next 2 years?

Note: Survey Respone [n=106]

Strengths-Weaknesses-Opportunities-Threats

Labor Market Strengths

- The SCV area is a fast growing sub-market within the larger Los Angeles County region. The number of payroll establishments within the SCV increased by more than 50% over the past 10 years, and local employment increased by more than 25% over the same period.
- The SCV area hosts a highly-educated, well-trained workforce of nearly 130,000 workers. Over half of the local workforce is college educated.
- The local workforce represents competitive wage opportunities for businesses seeking to locate in the SCV that also need high-skill workers.
- SCV business growth has not been limited to just a few large employers or concentrated in a single industry. The SCV hosts a diverse mix of businesses.

Labor Market Weaknesses

- Despite its vibrancy, the size of the local workforce in the SCV is too small to function as an isolated sub-market area.
- Presently, at least 35% of the local workforce, including high-skill workers, travels out of the SCV area to jobs in other locations of the Los Angeles region.
- The highly-skilled workforce means there is a relative shortage of local workers with the experienced-based skills needed to support significant business growth.
- Extensive work experience and long job tenure also contribute to relatively high wages among local workers with vocational and on-the-job training skills.

Labor Market Opportunities

- The SCV offers a high-quality living environment with modern infrastructure.
- The SCV offers value opportunities for businesses needing to modernize or customize plants and facilities.
- The SCV represents a significant reduction in travel time to work for a minimum of 1 out of every 5 of the 750,000 workers residing in the San Fernando Valley.

Labor Market Threats

- The SCV has been unduly stigmatized as a small-outlying business and employment market.
- The high cost of doing business within California is an impediment to business attraction and growth.
- Small start-up firms are threatened by a lack of access to working capital needed to deliver products to market and manage operating cash flow.

Appendix
Selected Survey Tables

Table A-1
Population and Household Growth Trends for Selected Reference Areas

Geographic Reference	1990	2000	2009	2010	2011	2016P
Population						
Santa Clarita Valley	146,891	204,688	257,574	272,277	273,618	279,218
East SFV	773,075	863,661	887,005	897,212	902,926	923,636
West SFV	558,236	615,486	650,511	654,216	656,586	670,571
SFV Total	1,331,311	1,479,147	1,537,516	1,551,428	1,559,512	1,594,207
Los Angeles County	8,863,164	9,519,338	9,785,295	9,818,605	9,854,218	10,003,982
Households						
Santa Clarita Valley	50,339	66,250	80,049	87,369	87,720	89,323
East SFV	272,971	289,053	291,911	296,769	298,497	304,633
West SFV	204,151	215,448	217,669	223,301	224,191	228,366
SFV Total	477,122	504,501	509,580	520,070	522,688	532,999
Los Angeles County	2,989,552	3,133,774	3,178,266	3,241,204	3,253,169	3,304,979

Source: ESRI ACS 2005-09 Population Report; US Census; ESRI 2011 Demographic Profile; AGA

Table A-2
Santa Clarita Valley Workforce Commuting Simulation

Workforce Criteria	1990	2000	2009	2010	2011	2016P
Demographic Characteristics						
Population	146,891	204,688	257,574	272,277	273,618	279,218
Households	50,339	66,250	80,049	87,369	87,720	89,323
Avg Hshld Size	2.87	2.95	3.07	3.01	3.02	3.03
Workforce Characteristics						
Participation Rate	55.0%	48.2%	48.2%	47.2%	47.2%	47.2%
Civillian Employed	**80,746**	**98,744**	**124,182**	**128,645**	**129,279**	**131,925**
Payroll Workers	68,826	82,548	102,742	106,434	106,958	109,831
Non-Payroll Workers	11,920	16,196	21,440	22,211	22,320	22,094
Workers/Household	1.60	1.49	1.55	1.47	1.47	1.48
Civillian Emp Ratios						
Payroll	85.2%	83.6%	82.7%	82.7%	82.7%	83.3%
Non-Payroll	14.8%	16.4%	17.3%	17.3%	17.3%	16.7%
Employed Within SCV	**50,000**	**66,344**	**86,715**	**83,669**	**84,085**	**88,275**
Payroll Workers	41,461	55,253	72,389	68,827	69,170	73,145
Non-Payroll Workers	8,538	11,091	14,327	14,842	14,915	15,130
Local Emp Ratios	**62%**	**67%**	**70%**	**65%**	**65%**	**67%**
Payroll	60%	67%	70%	65%	65%	67%
Non-Payroll	72%	68%	67%	67%	67%	68%
Employed Outside SCV	**30,746**	**32,400**	**37,467**	**44,976**	**45,194**	**43,650**
Payroll Workers	27,365	27,295	30,353	37,607	37,788	36,686
Non-Payroll Workers	3,381	5,105	7,113	7,369	7,405	6,964
Non-Local Emp Ratios	**38%**	**33%**	**30%**	**35%**	**35%**	**33%**
Payroll	40%	33%	30%	35%	35%	33%
Non-Payroll	28%	32%	33%	33%	33%	32%

Note: Non-Payroll workers include self-employed and non-paid family business members.

Source: ESRI ACS 2005-09 Pop-Report; ESRI 2010-11-16 Pop-Est; SCV-EDC Labor Market Survey-2012; SCV-EDC Monthly Economic Snapshots; AGA

Table A-3
Demographic Comparisons for Selected Geographic Areas

	SCV	East SFV	West SFV	All of SFV	LA Co
Total Population					
2009	257,574	887,005	650,511	1,537,516	9,785,295
2010	272,277	897,212	654,216	1,551,428	9,818,605
2011	273,618	902,926	656,586	1,559,512	9,854,218
2016P	279,218	923,636	670,571	1,594,207	10,003,982
Age Distribution					
0 to 5	7.9%	8.0%	7.2%	7.7%	7.9%
6 to 10	7.5%	6.4%	6.1%	6.2%	6.5%
11 to 17	11.4%	9.6%	9.4%	9.5%	10.1%
18 to 24	10.2%	10.4%	9.9%	10.2%	10.7%
25 to 34	12.5%	16.5%	13.7%	15.4%	15.0%
35 to 44	16.0%	15.3%	14.4%	14.9%	14.6%
45 to 54	16.4%	13.8%	14.8%	14.2%	13.9%
55 to 64	9.9%	10.0%	11.5%	10.6%	10.3%
65 to 74	4.8%	5.3%	6.5%	5.8%	5.8%
75 to 84	2.4%	3.1%	4.4%	3.7%	3.5%
85 & older	1.0%	1.5%	2.0%	1.7%	1.5%
Educational Acheivement					
Less than HS	2.9%	26.7%	17.0%	22.6%	24.5%
HS or GED	12.0%	22.0%	20.9%	21.5%	21.7%
Bus-VOC Sch	3.5%	3.2%	3.4%	3.3%	3.2%
Some College	23.4%	22.5%	24.1%	23.2%	22.2%
4Yr Degree	36.6%	16.4%	20.6%	18.2%	16.8%
Graduate Study	4.3%	1.8%	2.3%	2.0%	1.9%
Adv-Grad Degree	17.3%	7.4%	11.7%	9.2%	9.7%
Household Income					
Below $15K	5.7%	12.4%	9.5%	11.1%	14.0%
$15K - $24K	5.9%	11.4%	9.5%	10.6%	11.2%
$25K - $34K	6.6%	11.2%	8.8%	10.2%	10.4%
$35K - $49K	6.3%	14.7%	12.2%	13.7%	13.4%
$50K - $74K	16.4%	18.5%	17.4%	18.0%	16.9%
$75K - $99K	12.5%	11.7%	12.4%	12.0%	11.3%
$100K - $124K	14.9%	6.4%	8.3%	7.2%	6.8%
$125K - $149K	11.3%	5.2%	6.8%	5.9%	5.6%
$150K - $199K	11.4%	4.5%	7.5%	5.8%	5.2%
$200K Plus	8.9%	4.0%	7.6%	5.5%	5.4%

Note SCV data reflects responses to the 2012 household survey except for age distribution

Source: ESRI ACS 2005-09 Pop-Report; ESRI 2010-11-16 Pop-Est; SCV-EDC Labor Market Survey-2012

Table A-4
Workforce Comparisons for Selected Geographic Areas

	SCV	East SFV	West SFV	All of SFV	LA Co
Worker Employment Occupation					
Adv Degree-Scientific	2.4%	1.9%	2.7%	2.2%	2.2%
Computing-Eng-Arch	7.8%	2.8%	4.7%	3.6%	3.6%
Soc Svc-Education	9.3%	5.4%	6.6%	6.0%	6.7%
Bus Mgmt-Financial	20.4%	12.0%	15.9%	13.7%	13.4%
Art-Design-Media-Ent	8.4%	6.1%	4.3%	5.3%	4.1%
Health Practioner-Tech	5.5%	3.4%	4.9%	4.1%	4.0%
Health Support-Pers Care	4.7%	6.6%	5.7%	6.2%	5.9%
Office Admin-Clerical	6.8%	14.8%	15.0%	14.9%	14.7%
Sales-Marketing	12.4%	10.6%	12.8%	11.5%	11.4%
Food Service-Prep	3.0%	4.7%	4.2%	4.5%	5.0%
Bldg-Grnds Maint	1.4%	5.9%	4.5%	5.3%	4.7%
Const-Install-Repair	9.8%	11.4%	8.3%	10.1%	8.7%
Production-Fabrication	0.7%	7.3%	5.0%	6.3%	7.2%
Transport-Mat Moving	3.3%	5.4%	3.8%	4.7%	6.2%
Protection-Inspection-Misc	4.1%	1.7%	1.6%	1.6%	2.2%
Worker Employment Industry					
Agr-Min-Const	5.3%	9.4%	7.5%	8.6%	7.1%
Mfg	13.7%	10.3%	9.3%	9.9%	11.8%
Retail	8.5%	10.5%	11.4%	10.9%	10.6%
Ent-Dining-Lodging	12.5%	10.3%	8.4%	9.5%	9.7%
Whsle-Transp-Utility	3.3%	6.8%	6.1%	6.5%	9.2%
Fin-Info Svcs	13.6%	14.2%	15.5%	14.7%	11.5%
Prof-Misc Svcs	12.6%	19.3%	19.6%	19.4%	17.8%
Educ-Training Svcs	11.3%	6.5%	8.0%	7.1%	8.2%
Healthcare-Social Svcs	12.6%	10.7%	12.3%	11.4%	11.1%
Public Admin	6.8%	2.1%	2.0%	2.0%	3.2%
Work Travel Time					
Under 10 Min	19.6%	8.9%	9.0%	8.9%	8.8%
10 to 14 Min	10.0%	11.4%	11.8%	11.6%	11.6%
15 to 19 Min	11.4%	13.1%	13.5%	13.3%	13.9%
20 to 24 Min	9.3%	13.9%	13.2%	13.6%	14.2%
25 to 29 Min	2.7%	5.8%	6.0%	5.9%	5.6%
30 to 44 Min	17.0%	26.3%	23.8%	25.2%	24.8%
45 to 59 Min	11.4%	9.7%	9.9%	9.8%	9.2%
60 to 89 Min	13.6%	8.3%	9.7%	8.9%	8.7%
90 Min Plus	5.2%	2.6%	3.2%	2.9%	3.1%

Note SCV data reflects responses to the 2012 household survey except for age distribution

Source: ESRI ACS 2005-09 Pop-Report; ESRI 2010-11-16 Pop-Est; SCV-EDC Labor Market Survey-2012

Table A-5
Santa Clarita Workforce Comparisons by Industry

Industry Sub-Group	All Wrkg Adults	Work Location: Inside SCV	Work Location: Outside SCV	Travel Time To Work: Under 15 Minutes	15 to 29 Minutes	30 to 59 Minutes	60 or more Minutes
Agric-Mining-Foresty	1%	71%	29%	80%	0%	20%	0%
Construction	4%	32%	68%	15%	19%	26%	41%
Mfg-Biomedical	3%	48%	52%	32%	37%	32%	0%
Mfg-Aerospace-Defense	3%	52%	48%	32%	27%	23%	18%
Mfg-Digital & Optical Media	1%	29%	71%	29%	0%	57%	14%
Mfg-Comp-Comm-Elect	2%	33%	67%	28%	17%	28%	28%
Mfg-Other Durable	3%	48%	52%	38%	19%	29%	14%
Mfg-Non-Durable	1%	38%	63%	11%	44%	33%	11%
Whsle-Trasport-Wrhse	3%	46%	54%	25%	38%	13%	25%
Retail	8%	62%	38%	31%	37%	20%	12%
Info-Broadcast-Film	5%	21%	79%	23%	6%	29%	42%
Fin-Ins-Leasing	9%	50%	50%	34%	19%	20%	27%
Prof-Sci-Business	7%	62%	38%	43%	21%	19%	17%
Educ-Training Svcs	11%	58%	42%	33%	38%	24%	6%
Healthcare-Social Svcs	13%	39%	61%	23%	27%	32%	18%
Arts-Ent-Amuse	9%	37%	63%	28%	8%	45%	18%
Hotel-Lodging	1%	60%	40%	60%	0%	20%	20%
Dining-Food Svc	3%	68%	32%	40%	30%	15%	15%
Pers-Repair-Other Svc	5%	49%	51%	31%	19%	39%	11%
Govt Agencies-Military	7%	28%	72%	14%	14%	45%	27%
ALL INDUSTRIES	**100%**	**46%**	**54%**	**29%**	**24%**	**28%**	**19%**

Source: SCV-EDC Labor Market Survey - 2012

Table A-6
Santa Clarita Workforce Comparisons by Occupation

Industry Sub-Group	All Wrkg Adults	Work Location: Inside SCV	Work Location: Outside SCV	Travel Time To Work: Under 15 Minutes	15 to 29 Minutes	30 to 59 Minutes	60 or more Minutes
Adv Degree-Scientific	2%	47%	53%	41%	12%	24%	24%
Computing-Eng-Arch	8%	25%	75%	20%	13%	31%	35%
Soc Svc-Education	9%	55%	45%	29%	38%	26%	8%
Bus Mgmt-Financial	20%	44%	56%	32%	20%	25%	23%
Art-Design-Media-Ent	8%	34%	66%	32%	9%	37%	23%
Health Practioner-Tech	5%	45%	55%	22%	32%	29%	17%
Health Support-Pers Care	5%	38%	63%	21%	27%	27%	24%
Office Admin-Clerical	7%	69%	31%	40%	25%	31%	4%
Sales-Marketing	12%	60%	40%	32%	33%	26%	8%
Food Service-Prep	3%	81%	19%	50%	30%	10%	10%
Bldg-Grnds Maint	1%	60%	40%	30%	20%	20%	30%
Const-Install-Repair	10%	42%	58%	22%	23%	32%	23%
Production-Fabrication	1%	80%	20%	40%	40%	20%	0%
Transport-Mat Moving	3%	35%	65%	36%	23%	27%	14%
Protection-Inspection-Misc	4%	37%	63%	24%	14%	41%	21%
Sum-Total	**100%**	**47%**	**53%**	**30%**	**24%**	**28%**	**18%**

Source: SCV-EDC Labor Market Survey - 2012