



SANTA CRUZ COUNTY
WORKFORCE
DEVELOPMENT



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Industry, Economic & Workforce Research of Santa Cruz County

Produced for the Santa Cruz County Workforce Development Board

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PARTNERSHIP

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Introduction

The Santa Cruz County Workforce Development Board (WDB) partnered with BW Research to examine the region's changing economic and workforce landscape. The research highlights key industry clusters, job quality, talent and educational characteristics, and commute patterns. As markets emerge and decline, the research evaluates new opportunities and challenges for workforce development in Santa Cruz County. Some of the questions that drive this research include:

- How is the world of work changing in Santa Cruz County and its two sub-regions (North and South)?
- What industry clusters are healthy and growing and which ones are in decline?
- What is Santa Cruz County's current job quality profile?
- What type of workers is the County importing and exporting and are there opportunities to develop job prospects for local workers?
- How can the Workforce Development Board work with its partners across the County to facilitate countywide workforce and economic development strategies that connect with the needs and objectives of local job-seekers and businesses?
- How can the Workforce Development Board best support regional employers who are looking for talent?

Data for this report were mainly extrapolated from the Economic Modelling Specialists Intl. (Emsi), the Bureau of Labor Statistics, California Employment Development Department, and the U.S. Census Bureau.

Contributors and Acknowledgements

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Executive Summary

Key Findings

Despite steady job growth over the last several years, there are not enough jobs in Santa Cruz County to support the region’s working age population. Between 2007 and 2017, Santa Cruz County’s businesses created almost 6,300 new jobs, for a growth rate of six percent; this is comparable to the nationwide average, though slightly lower than California overall. At the same time, the countywide unemployment rate sits at six percent—higher than both state and national averages—indicating that the region has a “loose” labor market, and there are more residents seeking jobs than the region’s businesses can provide. Because of this, Santa Cruz County overall is a net exporter of talent across all skill levels; roughly 25,000 resident workers leave the County every day, commuting to jobs in neighboring regions.

In addition to a limited overall job supply, employment growth in Santa Cruz County is concentrated in low-skill, low-wage work. Over the last decade, Tier Three (as described on page 8) jobs have seen remarkably high growth, rapidly outpacing the rest of the labor market. These jobs include protective services, food service and retail, building and groundskeeping work, and personal care positions, and the median wage for a Tier 3 worker in Santa Cruz County is roughly \$25,000 per year. Low-skill, low-wage jobs have grown by almost 10 percent since 2007, compared to a three percent growth rate each for Tier 1 and Tier 2 jobs. In general, 52 percent of the workforce in Santa Cruz County is in a Tier 3 job compared to the statewide average of 46 percent.

Low-wage job prospects and above-average cost of living is affecting economic self-sufficiency. The average wage for Santa Cruz County sits at \$60,166 per year; this is a respective 30 percent and 10 percent lower than state- and nationwide averages. A Tier 3 worker in Santa Cruz County earns a median annual wage of roughly \$25,000 per year, while the living wage for a single adult is almost \$34,000 a year. The living wage for a family with one working adult and two children is roughly \$65,541 per year—a wage that is achievable only for a Tier 1 worker. In order to support a family of two children, a Tier 3 employee would have to work almost three jobs.

There are significant differences in economic opportunity for South County Santa Cruz residents compared to North County Santa Cruz residents. Job growth in South County was six points lower compared to North County and four points lower than the overall countywide average. Furthermore, the unemployment rate in the southern region hit 14 percent in March 2018. At the same time, South County has lower educational attainment and household incomes, and is thus disproportionately affected by the cost of housing compared to their northern neighbors. Six in ten adults 25 years of age or older in South County have only a high school diploma or less; this is double the countywide proportion and 40 percentage points higher than North County. Almost a third (31 percent) of residents in South County have a combined household income of less than \$35,000. Only eight percent earn \$150,000 or more, compared to just over 21 percent for North County. As a result, 51 percent of South County residents have to spend more than a third of their household income on rent.

The region has valuable opportunities for career pathway and workforce development programs that focus on four promising industry clusters in Santa Cruz County. The following industry clusters, (a) Information and Communications Technologies, (b) Finance and Banking, Insurance, and Real estate, (c) Healthcare, and (d) Biotechnology and Biomedical Devices have all grown by at least 10 percent between 2012 and 2017 and offer above average wages as well as strong career pathway opportunities for new skill development and career progression.

Conclusions and Next Steps

The research in this report profiles several economic and social indicators for Santa Cruz County to properly identify community strengths, opportunities, and challenges. To improve both security and equality within the County, the research team has identified the following next steps or areas of focus for Santa Cruz County's Workforce Development Board. The following recommendations seek to foster sustainable employment growth, expand access to education, and improve quality of life for residents across Santa Cruz County.

Engage relevant stakeholders to develop an education network that reaches out to underutilized potential. There are barriers to educational attainment or entering the workforce in general that have led to regional inequality in Santa Cruz County. In particular, there is untapped talent potential in the youth and young adults of South County, yet these individuals lack the education or training to enter into one of the region's high-wage, high-skill industry clusters. In order to prepare South County's large youth population for the world of work, the County needs a regionally-coordinated program or strategy that supports both technical and non-technical skill attainment; this could also include expansion of access not only to higher education, but more importantly internships, apprenticeships, and on-the-job training opportunities. Such a strategy would ideally link up with early childhood education providers and engage other stakeholders to develop a partnership across the region with the business community, educators, and workforce development programs.

Support local job creation by attracting new businesses to the region. With the region's high costs of living and limited supply of high quality jobs, it is important for Santa Cruz County to not only recruit high-wage businesses to the region but also support current industry clusters to grow and create more jobs. Expansion of free business planning infrastructure and resources that support businessowners and entrepreneurs will be vital to fostering healthy firm growth in Santa Cruz County; this would also include increasing business awareness and connectivity to such resources.

Understand the challenges of Santa Cruz County residents. The region faces high turnover and low retention rates due to cost of living. In fact, many employers invest in training workers for higher-skill, higher-wage positions, but once these workers have gained experience and training, they often leave the region. The Workforce Development Board may consider surveying residents to understand specific challenges such as housing and other costs of living, commuting, or job availability. Such a metric could help develop strategic plans to retain more talent in the region.

Economic and Workforce Profile

Employment and Economic Activity

Businesses across Santa Cruz County support a total of nearly 108,400 jobs. Between 2007 and 2017, the region's job market grew by six percent, or almost 6,300 new jobs. In fact, the region has seen an even increase in employment since 2011 (Figure 1). Overall countywide employment growth falls between the national average of 5.8 percent and the statewide average of 8.7 percent. Within the region, North County has seen greater-than-average job growth (eight percent) compared to South County (two percent). In fact, South County was four points below the countywide average and six points below North County for job growth over the last decade (Table 1).¹

Given significantly slower job growth in South County, this region also has a much higher unemployment rate compared to the rest of the county as well as the state and national average. The unemployment rate across both California and the United States sits at roughly four percent, compared to about two points higher, or 6.3 percent, in Santa Cruz County. In North County, unemployment is equivalent to the state and nationwide average of roughly four percent, while South County sits at a 13.7 percent rate of unemployment (Table 2). The lowest level of sustainable unemployment, also referred to as the natural rate of unemployment, for the U.S. economy in general is approximately 4.5 to six percent.² A low unemployment rate typically indicates a "tight" labor market, where there are more jobs than there are workers—demand outpaces supply and employers face hiring difficulties as they are unable to find employees to fill open positions. In Santa Cruz County, and particularly for South County, the labor market is "loose", and there are more individuals seeking work than the region's businesses can provide.

Economic Profile Summary

Overall employment growth in Santa Cruz is comparable to the nationwide average. In general, North County has seen jobs grow at a much faster rate compared to South County. As a result, Southern Santa Cruz County suffers from a significantly higher unemployment rate.

Despite positive job growth since 2011, unemployment remains above average and there are more workers seeking jobs than the region's businesses are able to provide.

Why is this Important?

Total job growth is a general indicator of economic health—how are businesses supporting regional population growth by creating jobs for new residents moving to Santa Cruz or young adults just entering the workforce. At the same time, **unemployment** metrics highlight over- or undersupply of workers for a region's economy. For Santa Cruz County, the labor market is considered "loose", and there are more workers than available jobs.

¹ For a zip code definition of North and South Santa Cruz County, please refer to Appendix A.

² Federal Reserve, 21 March 2018. Can be accessed at: https://www.federalreserve.gov/faqs/economy_14424.htm.

Another measure of regional economic health, the civilian labor force participation rate (LFPR) examines the total number of civilians actively employed in the labor force or seeking work compared to total individuals 16 years of age or older. Santa Cruz County and its sub-regions have an above-average labor force participation rate compared to the state- and nationwide average of 63 percent. Overall, the County’s LFPR is 64.1 percent, with North County slightly lower at 63.7 percent and South County higher at 65.3 percent (Table 2).

The above metrics are overall indicators of a region’s economic health, highlighting the extent to which businesses in Santa Cruz County are creating enough jobs to support the region’s current and future population. The following section will examine to what extent these jobs support sustainable wages and careers for residents across the region.

Figure 1. Overall Employment Growth in Santa Cruz County, 2007-2017³



Table 1. Overall Employment Growth by Region, 2007-2017⁴

Region	Employment Growth
Santa Cruz County	6.1%
North County	8.0%
South County	2.0%
California	8.7%
United States	5.8%

³ Emsi 2018.1 QCEW and Non-QCEW Employees. Extracted April 2018.

⁴ Emsi 2018.1 QCEW and Non-QCEW Employees. Extracted April 2018.

Table 2. Labor Force Participation (2016) and Unemployment Rates (2017) by Region⁵

Region	Labor Force Participation Rate	Unemployment Rate
Santa Cruz County	64.1%	5.7%
North County	63.7%	5.4%
South County	65.3%	6.4%
California	63.4%	4.8%
United States	63.5%	4.4%

Job Quality

While the above metrics are important general indicators of economic health, overall job growth provides no detail on skill requirements and compensation levels for the predominant industries and occupations within a region. To that end, BW Research has developed an occupational segmentation technique to delineate jobs into one of three tiers based on wages and skill requirements. Nearly all occupations can be delineated into one of the following three occupational tiers:

Tier 1 Occupations

include managers, professional positions (lawyers, accountants, physicians), and high-skill technical occupations (scientists, programmers, engineers). These are typically higher-paying occupations. In Santa Cruz County, the **median wage for a Tier 1 worker is \$82,300 a year.**

Tier 2 Occupations

include sales positions, teachers, librarians, office and administrative positions, as well as manufacturing, operations, and production occupations. These can be considered middle-skill, middle-wage position. In Santa Cruz County, the **median wage for a Tier 2 worker is \$44,165 a year.**

Tier 3 Occupations

include protective services, food service and retail, building and grounds keeping, and personal care positions. These are typically lower-paying occupations. In Santa Cruz County, the **median wage for a Tier 3 worker is \$25,006 a year.**

⁵ Labor Force Participation Rates: U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018; Unemployment Rates in California: California Economic Development Department, 2017 Annual Average. Extracted April 2018; Unemployment Rate for US: Bureau of Labor Statistics, Current Population Survey. March 2018. Extracted April 2018.

Job Quality Summary

Low-skill, low-wage occupations have been growing the fastest in Santa Cruz County, rapidly outpacing the rest of the job market. These jobs do not pay sustainable wages to support a family, let alone a single adult. In order to support a family of two children, a Tier 3 employee would have to work almost three jobs.

Why is this Important?

Job quality is one of the most important indicators for a region's long-term economic sustainability. High-quality, high-wage jobs in a region not only have a large employment multiplier, but also allow provide opportunity for the local workforce to live, work, and play in a high-cost region like Santa Cruz County.

Not only are these low-paying jobs insufficient at supporting the region's cost of living, many low-skill occupations are also subject to technology automation; this could lead to a feedback loop in which individuals with low educational attainment are at risk of losing their jobs yet unable to find work in higher-skill positions.

In Santa Cruz County, growth in Tier 3 (lower skill, lower wage) occupations is rapidly outpacing the rest of the labor market. Between 2007 through 2017, low-skill, low-wage occupations grew by 10 percent, while medium- and high-skill occupations grew by roughly three percent (Figure 2). The region's growth in Tier 3 jobs is roughly comparable to the statewide growth rate of 9.7 percent over the same time, but both Tier 1 (12.8 percent) and Tier 2 jobs (five percent) are growing at a faster rate in California compared to Santa Cruz County, meaning there is a more even distribution of occupational growth. Not only are residents in Santa Cruz County faced with insufficient job opportunities, but many of the jobs that are being created are low-paying positions with fewer opportunities for career advancement.

Figure 2. Change in Job Quality for Santa Cruz County, 2007-2017⁶



In general, Santa Cruz County has a higher proportion of Tier 3 workers compared to both state and national averages—about six points above the average. Over half of the workforce (52 percent) across the County is in a low-wage, low-skill position, while less than a third (30 percent) are in Tier 2 jobs; about two in ten individuals work in high-paying, high-skill jobs (Table 3).

Table 3. Job Quality Distribution by Region, 2017⁷

	Tier 1	Tier 2	Tier 3
Santa Cruz County	18.6%	29.5%	51.7%
North County	19.8%	28.9%	51.2%
South County	15.0%	30.9%	53.0%
California	22.4%	30.3%	46.2%
United States	20.8%	32.4%	45.4%

Furthermore, there are not enough jobs providing sustainable wages to support a family, let alone a single adult living alone. The average annual wage for a single adult with no children working in food service or retail (a Tier 3 occupation) is roughly \$25,000 per year; this is lower than the minimum living wage of \$14.67 per hour or \$30,514 a year for one adult in Santa Cruz County. Even more, the living wage for two adults, one working, with two children—\$31.51 per hour or roughly \$65,541 a year—is

⁶ Emsi 2018.1 QCEW and Non-QCEW Employees. Extracted April 2018.

⁷ Emsi 2018.1 QCEW and Non-QCEW Employees. Extracted April 2018. It should be noted that percentages will not sum to 100, as not all occupations can be delineated into one of the three tiers.

achievable only for a Tier 1 worker.⁸ In order to support a family of two children, a Tier 3 employee would have to work almost three jobs (Table 4).

Table 4. Number of Jobs Required to Meet Family Self-Sufficiency⁹

	Median Annual Wage	Number of Jobs to Meet Family Self-Sufficiency
Tier 1	\$82,300	0.80
Tier 2	\$44,165	1.48
Tier 3	\$25,006	2.62

Job Volatility

The world of work is continually changing and many of the jobs of today will not be found in the jobs of tomorrow. BW Research recently (2017 data) completed a national analysis of job volatility by occupational segment and industry to better understand how the world of work could change over the next five to 10 years. The analysis focused more specifically on the impact that technology and automation can have on employment opportunities into the future. The analysis looked to:

- Assess occupations and industry employment patterns based on current job skills and the likelihood that those skills could be replaced by technology or some related advancement in automation;
- Evaluate and better understand the magnitude of change that is likely to occur in employment composition by industry and occupational segment over the next five to 10 years; and,
- Measure the potential job volatility within a given region, such as Santa Cruz County, and the impact it could have on the County’s industry clusters.

The national job volatility analysis included a review of historical industry and occupational trends from 2010 to 2016 as well as an examination into the skills and abilities that are required in today’s occupations. The examination of occupational skills was built upon an assessment of the likelihood of that skill being automated and its relative importance for the position.¹⁰

From an occupational perspective, Santa Cruz County has slightly less highly volatile jobs than the national average. Nationally, 22 percent of employment is currently found in positions that are considered highly volatile according to our national analysis. Approximately 20 percent of current Santa

⁸ MIT Living Wage Calculator, 2018. Annual salary calculation assumes a full-time worker—40 hours per week and 52 weeks per year, or 2,080 hours per year.

⁹ Family self-sufficiency is defined as the living wage for two adults, one working, with two children—\$31.51 per hour, or \$65,541 per year.

¹⁰ Automation Assessment included information and analysis from the following study:
https://www.oxfordmartin.ox.ac.uk/downloads/academic/The_Future_of_Employment.pdf

Cruz County employment would fall into the highly volatility category. These findings still indicate that approximately one in five jobs in Santa Cruz County will likely be impacted by automation and technology in the next five to 10 years, changing the skills and training required for the position or changing the position and title altogether.

Occupationally, Santa Cruz County has a relatively low concentration of:

- Transportation and material movement positions
- Production positions

This contributes to the region's just below average proportion of highly volatility jobs. However, Santa Cruz County does have a relatively high concentration of food preparation and service positions, which have the second highest job volatility score.

Industry Clusters

Industry clusters are geographic concentrations of labor and capital that share a common market and exchange supporting goods and services. Unlike the classical industry sectors, clusters are comprised of interrelated industries complementing various elements of the supply chain, creating a local ecosystem of industries. Industry clusters are also a useful framework to identify relevant focal points for workforce and economic development. Industry cluster analyses outline local economic drivers, emphasizing job growth and quality allowing Santa Cruz County's Workforce Development Board to:

1. **Engage with employers** that are central to countywide economic growth. Regional markets may be less connected to the overall labor market trend. A focus on industry clusters provides insight into how local employers collaborate to drive the County's economic growth.
2. **Provide valuable information to current workers and job-seekers** looking to develop new skills and career pathways. Workforce development focused on key areas of growth will capitalize on the region's job opportunities, guide individuals to sectors with strong employer demand, and grow the local economy.
3. **Design programs that best support the current and projected regional workforce demand.** Industry cluster analysis helps understand regional employer demand to create valuable workforce development programs.
4. Ensure that job-seekers can **transition into employment with sustainable wages** and strong career opportunities because most industry clusters are targeted towards high-quality employment within the County.

Industry Cluster Summary

The four targeted industry clusters for focus in Santa Cruz County include (a) Information and Communications Technologies, (b) Finance and Banking, Insurance, and Real Estate, (c) Healthcare, and (d) Biotechnology and Biomedical Devices. Collectively, these clusters accounted for almost 22,000 workers in 2017 and have all grown between 10 to 27 percent over the last six years. The average annual wage for these four clusters is between \$67,000 and \$148,000 a year.

Why is this Important?

Industry clusters provide a framework to help identify opportunities for workforce development. This analysis highlights Santa Cruz's specific areas of strength both currently and likely into the future, allowing for appropriate planning and investments to be made that best support the region's jobseekers and employers.

The following section profiles 18 standard industry clusters as they relate to Santa Cruz County's economy. For ease of understanding and analysis, the clusters are divided into three categories based on average wage; high-wage clusters provide an average annual wage of more than \$100,000, mid-wage clusters offer wages between \$65,000 and \$80,000, and low-wage industry clusters have an average annual wage that is roughly \$27,000 to \$53,000 per year.

Export-Oriented vs. Population-Serving Clusters

Not all industry clusters have the same impact on North County’s workforce and the regional economy. Export-oriented clusters that draw revenue from markets outside the region result in a multiplier effect that generates additional employment within the region. This is an important consideration for economic and workforce developers looking at training and education programs that will have the highest return on investment for the county. These export-oriented clusters are also likely to drive innovation as they typically face competitive global markets.

Santa Cruz County Industry Cluster Overview

The following tables provide an overview of total employment, average wage, job growth, and location quotient for each of the 18 industry clusters in Santa Cruz County. The largest employers in Santa Cruz County, in terms of total jobs, include Healthcare; Retail; Agriculture and Food; and, Tourism, Hospitality, and Recreation. Together, these clusters account for almost 50,000 workers across the County.¹¹

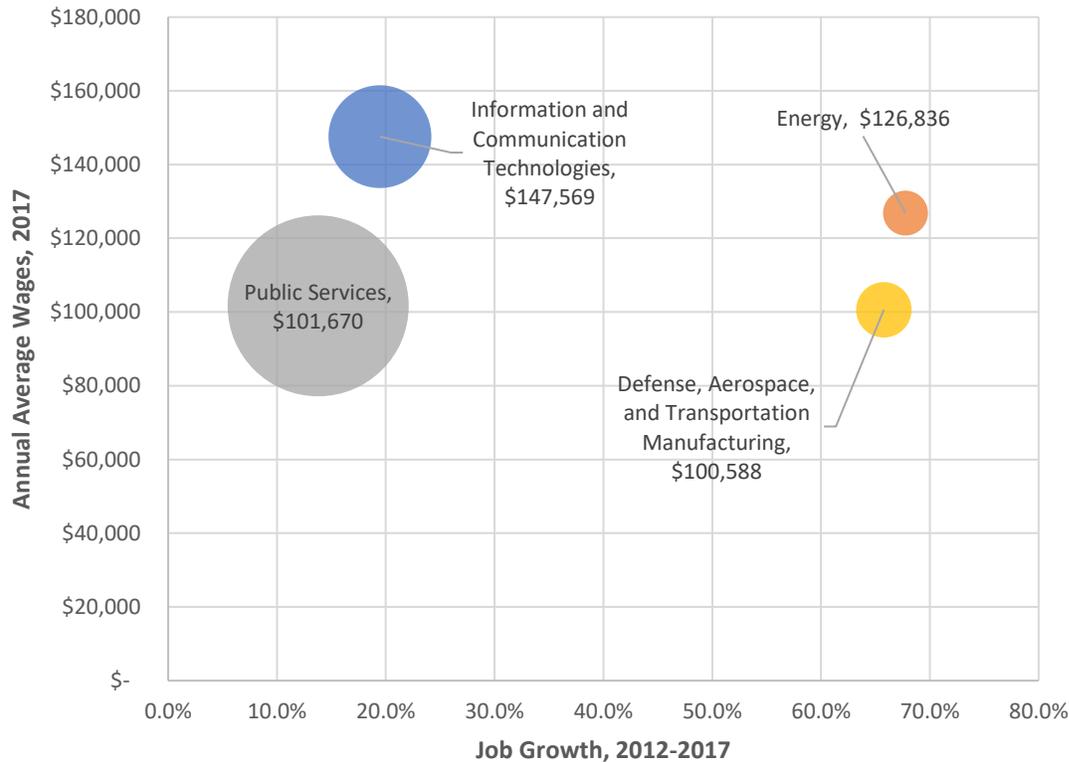
For Santa Cruz County, the highest-wage industry clusters include Information and Communication Technologies, Energy, Public Services, as well as Defense, Aerospace, and Transportation Manufacturing. Not only do these clusters provide an annual average wage that is greater than \$100,000 per year, they have also exhibited above-average job growth. Between 2012 and 2017, these four industry clusters have grown between 14 and 68 percent. While Energy is the fastest growing industry cluster, it is important to note that because it is a relatively small segment, 68 percent job growth translates to an additional 164 jobs (Table 5, Figure 3).

Table 5. Industry Cluster Overview – High-Wage Clusters

	2017 Jobs	2017 Average Wage	Growth 2012-17	LQ
Information and Communication Technologies	2,130	\$ 147,569	19.5%	0.69
Energy	406	\$ 126,836	67.8%	0.29
Public Services	6,596	\$ 101,670	13.8%	0.85
Defense, Aerospace, and Transportation Manufacturing	620	\$ 100,588	65.8%	0.38

¹¹ Emsi 2018.1 QCEW and Non-QCEW Employees. Extracted April 2018.

Figure 3. High-Wage Industry Clusters

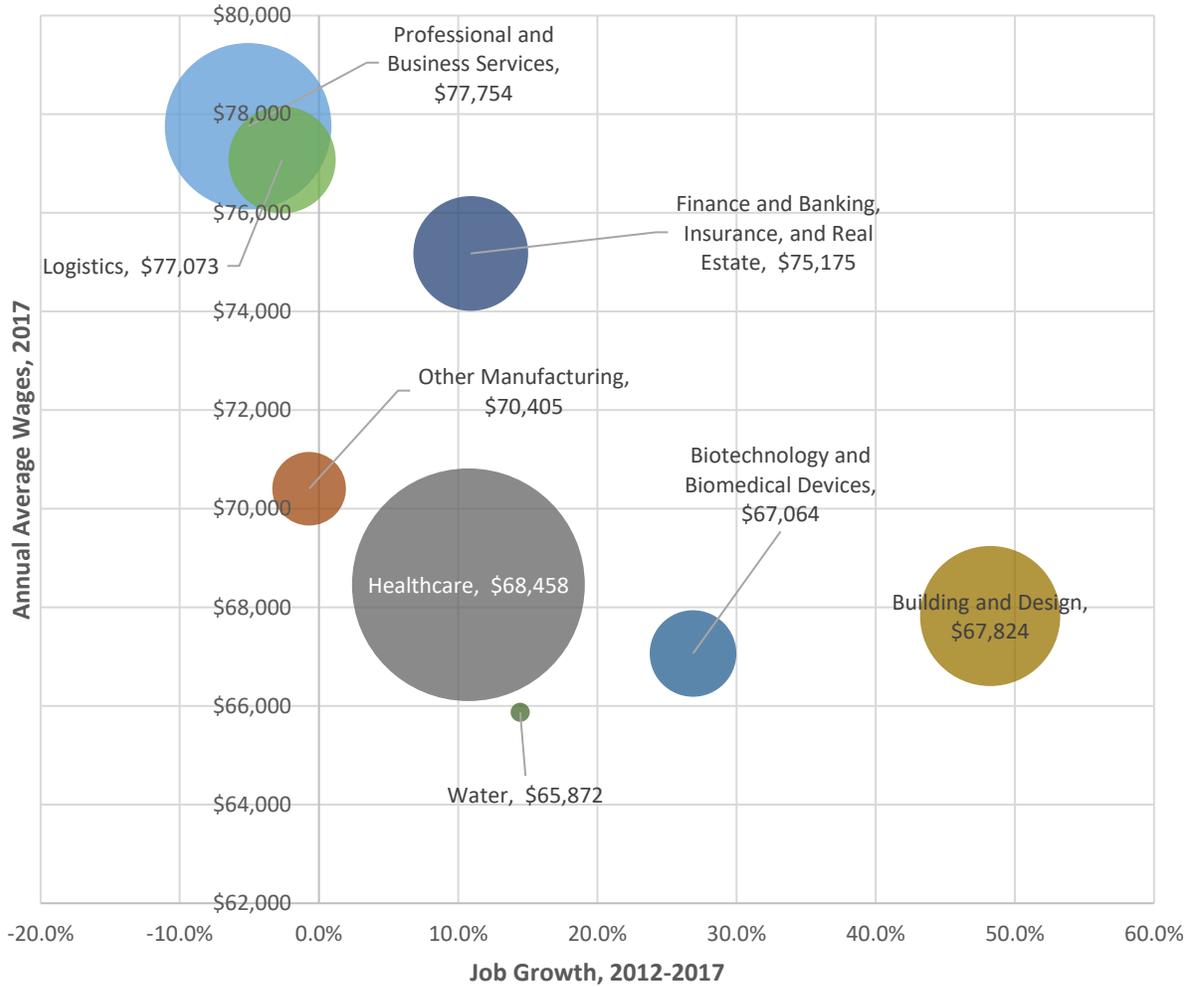


The following table and bubble chart highlight the region’s mid-wage industry clusters, nearly all of which have experienced significant growth, with the exception of Professional and Business Services (-5 percent), Logistics (-3 percent), and Other Manufacturing (-1 percent). Building and Design firms employ just over 5,000 workers and have grown by almost 50 percent over the last six years; these businesses are also 33 percent concentrated in Santa Cruz County compared to the national average (Table 6, Figure 4).

Table 6. Industry Cluster Overview – Middle-Wage Clusters

	2017 Jobs	2017 Average Wage	Growth 2012-17	LQ
Professional and Business Services	7,199	\$ 77,754	-5.1%	0.66
Logistics	2,979	\$ 77,073	-2.6%	0.61
Finance and Banking, Insurance, and Real Estate	3,417	\$ 75,175	10.9%	0.6
Other Manufacturing	1,406	\$ 70,405	-0.7%	0.36
Healthcare	14,056	\$ 68,458	10.7%	1.09
Building and Design	5,096	\$ 67,824	48.2%	0.82
Biotechnology and Biomedical Devices	1,945	\$ 67,064	26.9%	1.33
Water	95	\$ 65,872	14.5%	0.58

Figure 4. Middle-Wage Industry Clusters

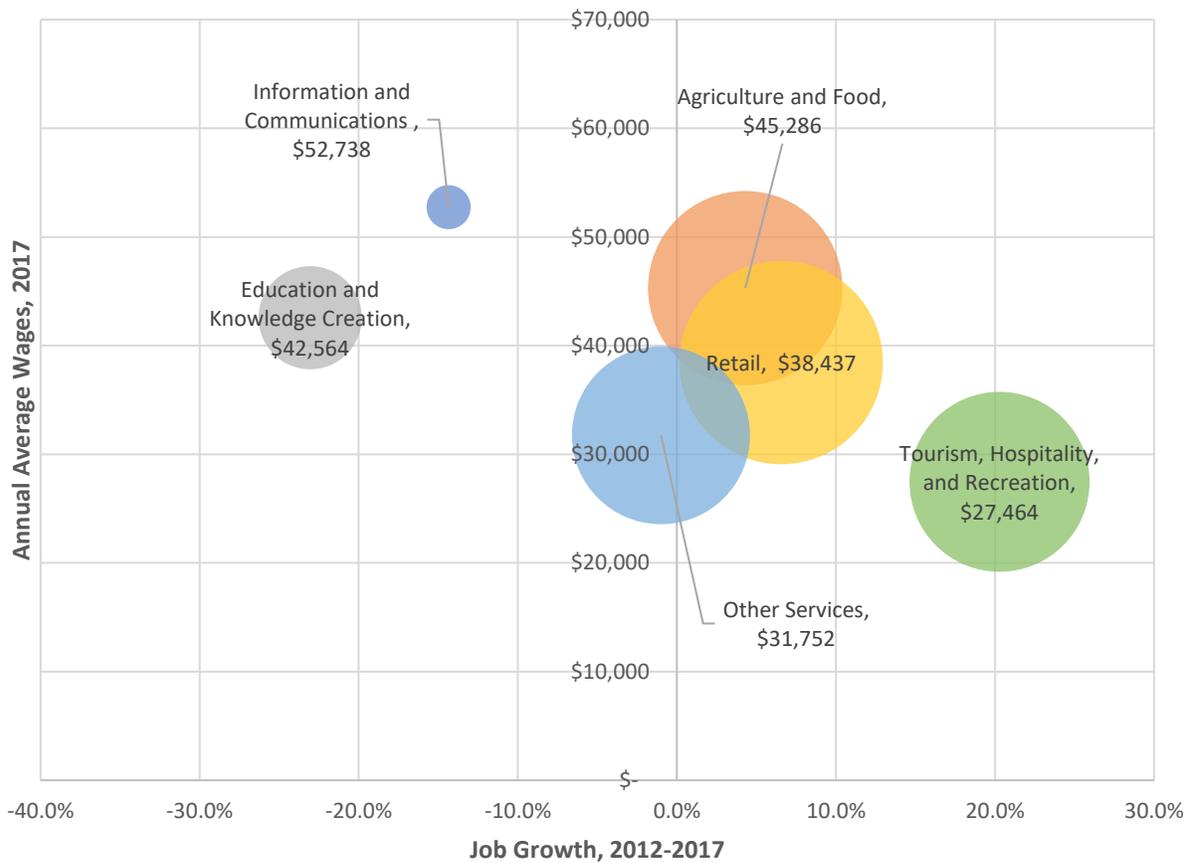


The low-wage industry clusters in Santa Cruz County include Information and Communications, Agriculture and Food, Education and Knowledge Creation, Retail, Other Services, and Tourism, Hospitality, and Recreation. In addition to providing an annual average wage that is below \$53,000 per year, many clusters have seen employment decline by one to 23 percent between 2012 and 2017 (Table 7, Figure 5).

Table 7. Industry Cluster Overview – Low-Wage Clusters

	2017 Jobs	2017 Average Wage	Growth 2012-17	LQ
Information and Communications	585	\$ 52,738	-14.3%	0.45
Agriculture and Food	11,350	\$ 45,286	4.3%	4.06
Education and Knowledge Creation	3,198	\$ 42,564	-23.1%	0.8
Retail	12,431	\$ 38,437	6.6%	1.02
Other Services	9,517	\$ 31,752	-1.0%	1.14
Tourism, Hospitality, and Recreation	9,736	\$ 27,464	20.3%	1.12

Figure 5. Low-Wage Industry Clusters



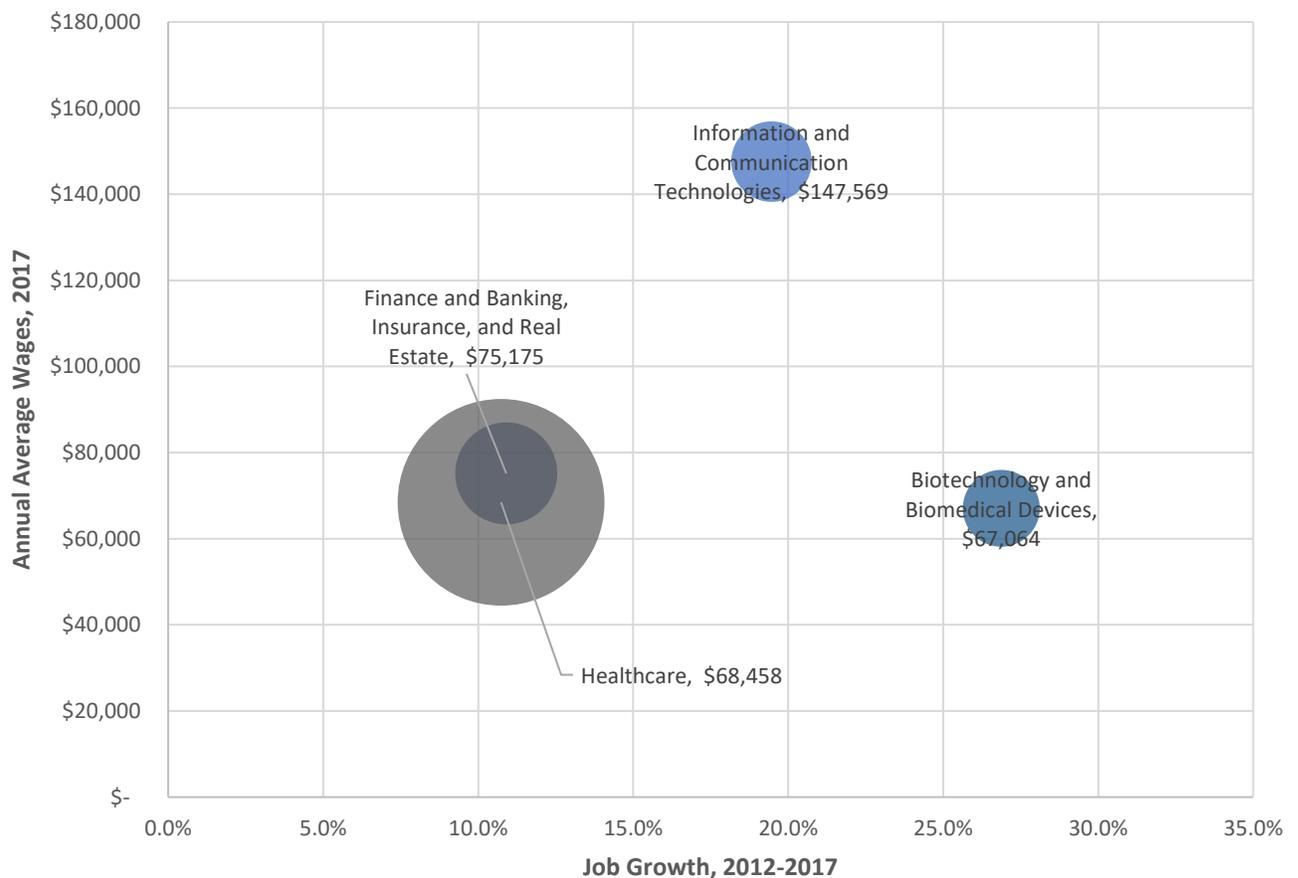
Targeted Industry Clusters

Out of the above 18 industry clusters, the research team selected the following four clusters due to growth, training, and career pathway opportunities for jobseekers in Santa Cruz County. Altogether, the targeted industry clusters employed a total of almost 22,000 workers in 2017, providing an average annual wage that is higher than \$100,000 per year. In addition to high annual wages, these clusters have grown employment by 14 to 68 percent since 2012 (Table 8, Figure 6).

Table 8. Targeted Industry Clusters

	2017 Jobs	2017 Average Wage	Growth 2012-17	LQ
Information and Communication Technologies	2,130	\$ 147,569	19.5%	0.69
Energy	406	\$ 126,836	67.8%	0.29
Public Services	6,596	\$ 101,670	13.8%	0.85
Defense, Aerospace, and Transportation Manufacturing	620	\$ 100,588	65.8%	0.38

Figure 6. Targeted Industry Clusters



Job Quality by Industry Cluster

The following tables illustrate the distribution of jobs by their respective occupational tier within each industry cluster in Santa Cruz County. A majority of employment in Information and Communication Technologies, Biotechnology and Biomedical Devices, and Energy can be found in Tier 1 and Tier 2 positions, while over 70 percent of employment in Tourism, Hospitality & Recreation, Retail, as well as Agriculture and Food is found in Tier 3 occupations.

The four highlighted industry clusters of focus below are all mostly concentrated in either Tier 1 or Tier 2 occupations, with the majority of Information and Communication Technologies jobs (58 percent) in Tier 1, followed by Biotechnology and Biomedical Devices (33 percent).

Figure 7. Industry Cluster Job Quality, 2017 – High-Wage Clusters

	Tier 1	Tier 2	Tier 3
Information and Communication Technologies	58.4%	23.8%	17.8%
Energy	35.8%	39.1%	25.2%
Public Services	24.6%	49.7%	25.7%
Defense, Aerospace, and Transportation Manufacturing	23.4%	39.1%	37.6%

Figure 8. Industry Cluster Job Quality, 2017 – Mid-Wage Clusters

	Tier 1	Tier 2	Tier 3
Biotechnology and Biomedical Devices	32.9%	28.6%	38.6%
Professional and Business Services	31.0%	24.4%	44.6%
Finance and Banking, Insurance, and Real Estate	27.0%	43.7%	29.3%
Healthcare	26.6%	33.4%	40.1%
Building and Design	19.2%	69.3%	11.5%
Water	15.8%	74.7%	9.8%
Other Manufacturing	12.5%	35.2%	52.3%
Logistics	11.9%	43.6%	44.4%

Figure 9. Industry Cluster Job Quality, 2017 – Low-Wage Clusters

	Tier 1	Tier 2	Tier 3
Education and Knowledge Creation	21.1%	38.2%	40.7%
Information and Communications	14.0%	44.4%	41.7%
Agriculture and Food	11.0%	17.1%	71.9%
Other Services	8.6%	21.7%	69.7%
Tourism, Hospitality, and Recreation	5.1%	7.7%	87.2%
Retail	5.0%	20.4%	74.6%

Growth Forecast by Industry Cluster

Santa Cruz County has several economic drivers that will provide momentum to propel the economy forward. The region has seen about 65 percent growth each in the high-skill and high-wage industries of Defense, Aerospace, and Transportation Manufacturing as well as Energy over the past five years. The County has a below average exposure to high volatility and generally lower-wage occupations, particularly the production and transportation and material movement professions. Additionally, the Northern region has an above-average educated workforce; more than 80 percent of the population has completed some college, and nearly three-quarters (72 percent) of those have a bachelor's degree or higher. This higher-than-average household education also corresponds to a higher-than-average median household income. Santa Cruz County's relatively high labor force participation rate and generally high quality of life, as evidenced through higher-income household distributions, indicate that the region's working age population is economically active.

The County also faces a number of headwinds that may hamper economic vitality. Most notably, a disproportionately high percentage of the County's jobs are lower-paying Tier 3 jobs (51.7 percent vs 45.4 percent nationally). When coupled with the higher-than-statewide-average cost of living, it is evident that lower-income residents find it exceptionally difficult to make ends meet. The average earnings in the County are below the median household income, indicating that many of the County's higher-wage residents live in Santa Cruz, but work outside the County—likely in neighboring Santa Clara County. Another considerable risk is that Santa Cruz County has an extremely high concentration of food service and agricultural jobs—four times that of the national average. Over 70 percent of occupations in this industry are Tier 3 jobs and may also face volatility and risk through automation in the near future.

Given the considerations outlined above, a three to four percent growth in employment over the next 24 months is forecasted and is comparable to statewide expectations. Industries like Healthcare, Finance and Banking, Insurance, Real Estate, and Information and Communication Technologies will continue to see strong growth in the region, resulting in increased demand for nursing, financial sales, and software engineering occupations. Growth in these industries will lead to a modest increase of two to five percent in average earnings in the region. Considerable opportunities lie in persuading these industries to move closer to their workforce in Santa Cruz and developing educational and technical programming, particularly in South County. South County's large youth population presents opportunity if the appropriate educational and technical programs are in place, but present challenges if otherwise overlooked. The agricultural and food manufacturing economy could achieve significant windfall through value-added production efforts such as organic production and marketing, and preparing or otherwise transforming the product from wholesale status to a more finished and profitable product. Such advancements would also serve to hedge the industry against some of the more immediate threats of automation.

Occupational Clusters and Career Pathways

Targeted Occupational Clusters

The following occupational clusters are highlighted as general areas of focus for jobseekers and potential workforce development programs in Santa Cruz County. These clusters were selected for their high concentration in the region within each industry cluster as well as the supply of a sustainable living wage for residents in Santa Cruz County. Furthermore, many skillsets attained through working in each of these clusters allows for transferability across the various industry clusters either inside or outside of the region.

Occupations and Career Pathways Summary

Long-term occupational outlook for Santa Cruz County jobseekers includes Office and Administrative, Healthcare, Business and Finance, and Sales Positions. These occupational clusters are largely represented in the four targeted industry clusters for the region, indicating opportunity for training and skill transferability across the region's industry segments.

Why is this Important?

Occupational clusters by industry cluster are important for understanding industry-specific wages and jobs potential in the region. For example, a sales representative in Retail compared to a sales representative in Biotechnology will have different skill requirements and average wages.

As the nation's job market continues to shift towards high-skilled occupations, sustainable career pathway models are becoming increasingly important, particularly for lower-skill workers who are less able to invest in educational attainment. **Career pathways** provide the opportunity for skill development through on-the-job training and outline potential steps to transition into higher-paying positions over time.

Table 9. Occupational Clusters – Information and Communication Technologies

	2017 Jobs	Average Wage
Computer, Math, and Quantitative Analysts	670	\$ 85,488
Business and Finance Positions	313	\$ 84,365
Office and Administrative Positions	294	\$ 40,061
Architecture and Engineering	228	\$ 87,901

Table 10. Occupational Clusters – Finance and Banking, Insurance, and Real Estate

	2017 Jobs	Average Wage
Office and Administrative Positions	629	\$ 40,061
Business and Finance Positions	549	\$ 84,365
Management Positions	156	\$ 122,054
Sales Positions	147	\$ 40,227

Table 11. Occupational Clusters – Healthcare

	2017 Jobs	Average Wage
Healthcare Positions	6,451	\$ 84,032
Office and Administrative Positions	2,387	\$ 40,061
Community and Social Service Positions	1,538	\$ 54,558

Table 12. Occupational Clusters – Biotechnology and Biomedical Devices

	2017 Jobs	Average Wage
Office and Administrative Positions	298	\$ 40,061
Scientists	207	\$ 65,957
Business and Finance Positions	181	\$ 84,365
Healthcare Positions	137	\$ 84,032
Sales Positions	129	\$ 40,227

Career Pathways for Targeted Industry Clusters

The following tables dig deeper into the occupational clusters and profile potential career pathways within each of four the targeted industry clusters. The specific occupations selected were based on overall positive job growth for the region. Each pathway progresses from entry-level positions with low education requirements—high school diploma or some college—to higher-skill, higher-wage positions that require a college degree.

For example, a jobseeker interested in the information and communication technologies sector could land an entry-level job as a customer service representative in order to gain experience and on-the-job training within the industry. During this time, with additional training, education, or certifications, a worker could move on to becoming a computer user support specialist and then eventually into software development or information systems management (Table 13).

Table 13. Potential Career Pathway – Information and Communication Technologies

	2017 Jobs	Median Hourly	Growth 2016-17	Typical Entry-level Education
Customer Service Representatives	49	\$18.97	9%	High school diploma or equivalent
Computer User Support Specialists	79	\$23.69	11%	Some college, no degree
Computer Systems Analysts	69	\$44.02	15%	Bachelor's degree
Software Developers, Systems Software	143	\$53.49	6%	Bachelor's degree
Computer and Information Systems Managers	60	\$57.38	9%	Bachelor's degree

Table 14. Potential Career Pathway – Finance and Banking, Insurance, and Real Estate

	2017 Jobs	Median Hourly	Growth 2016-17	Typical Entry-level Education
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	89	\$19.09	1%	High school diploma or equivalent
Customer Service Representatives	116	\$18.97	1%	High school diploma or equivalent
Property, Real Estate, and Community Association Managers	106	\$29.66	2%	High school diploma or equivalent
Personal Financial Advisors	69	\$37.87	1%	Bachelor's degree
General and Operations Managers	69	\$46.11	1%	Bachelor's degree

Table 15. Potential Career Pathway – Healthcare

	2017 Jobs	Median Hourly	Growth 2016-17	Typical Entry-level Education
Personal Care Aides	1,429	\$11.87	2%	High school diploma or equivalent
Medical Secretaries	403	\$18.86	3%	High school diploma or equivalent
Dental Assistants	351	\$17.83	1%	Postsecondary nondegree award
Medical Assistants	539	\$18.90	3%	Postsecondary nondegree award
Registered Nurses	1,421	\$67.18	2%	Bachelor's degree

Table 16. Potential Career Pathway – Biotechnology and Biomedical Services

	2017 Jobs	Median Hourly	Growth 2016-17	Typical Entry-level Education
Pharmacy Technicians	19	\$19.90	6%	High school diploma or equivalent
Phlebotomists	25	\$17.36	9%	Postsecondary nondegree award
Medical and Clinical Laboratory Technicians	23	\$26.47	5%	Associate's degree
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	48	\$30.16	4%	Bachelor's degree

Demographic Profile

The following sections examine population growth, age distribution, ethnicity, and educational attainment across Santa Cruz County and within its two sub-regions. Age and population growth are key to understanding the employment or training needs of the region's working age population as well as the overall labor supply available for the region's businesses. An additional profile of differences by ethnicity and educational attainment, particularly across North and South County, help to identify where strategic planning and workforce development initiatives should be targeted depending on the needs of specific populations within Santa Cruz County.

Population Demographics: Growth and Age Distribution

Population growth in Santa Cruz County has been linear—roughly one percent growth each year over the last seven years. Between 2010 and 2016, the region's population, including North and South County, grew by roughly five to six percent. South County saw explosive growth from 2010 through 2014 before leveling out; the total population in South County has declined slightly by about 122 individuals between 2014 and 2016 (Figure 10).

About 22 percent of the population is under the age of 18, this is slightly higher for South County (29 percent) and lower for North County (19 percent). Over half, or 51 percent, of the countywide population are of working age, roughly 18 to 54 years old; this is comparable to both the state and nationwide averages. North County has a higher proportion of older residents over the age of 54 (30 percent), compared to both South County (20 percent) and the overall countywide average (28 percent) (Figure 11). In general, the population has become slightly older, as the proportion of residents over the age of 54 increased by five points from 23 percent in 2010 to 28 percent in 2016.

Population Demographics Summary

Overall population growth for the County has been linear, while South County saw exceptionally fast growth from 2010 through 2014. Just over half the countywide population is working age, but South County has a much higher proportion of residents under the age of 18.

Why is this Important?

Examining population dynamics and how they vary within the region provides an understanding of the County's potential student, workforce, and senior populations. These populations impact regional workforce availability as well as demand for education and training.

Figure 10. Population Growth by Sub-Region, 2010-2016¹²

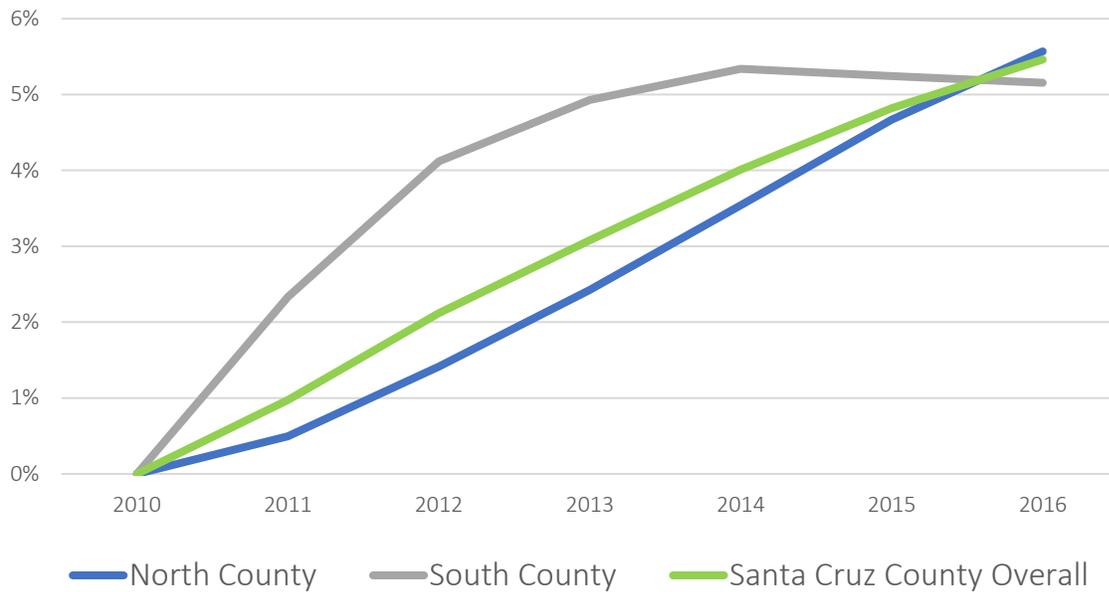
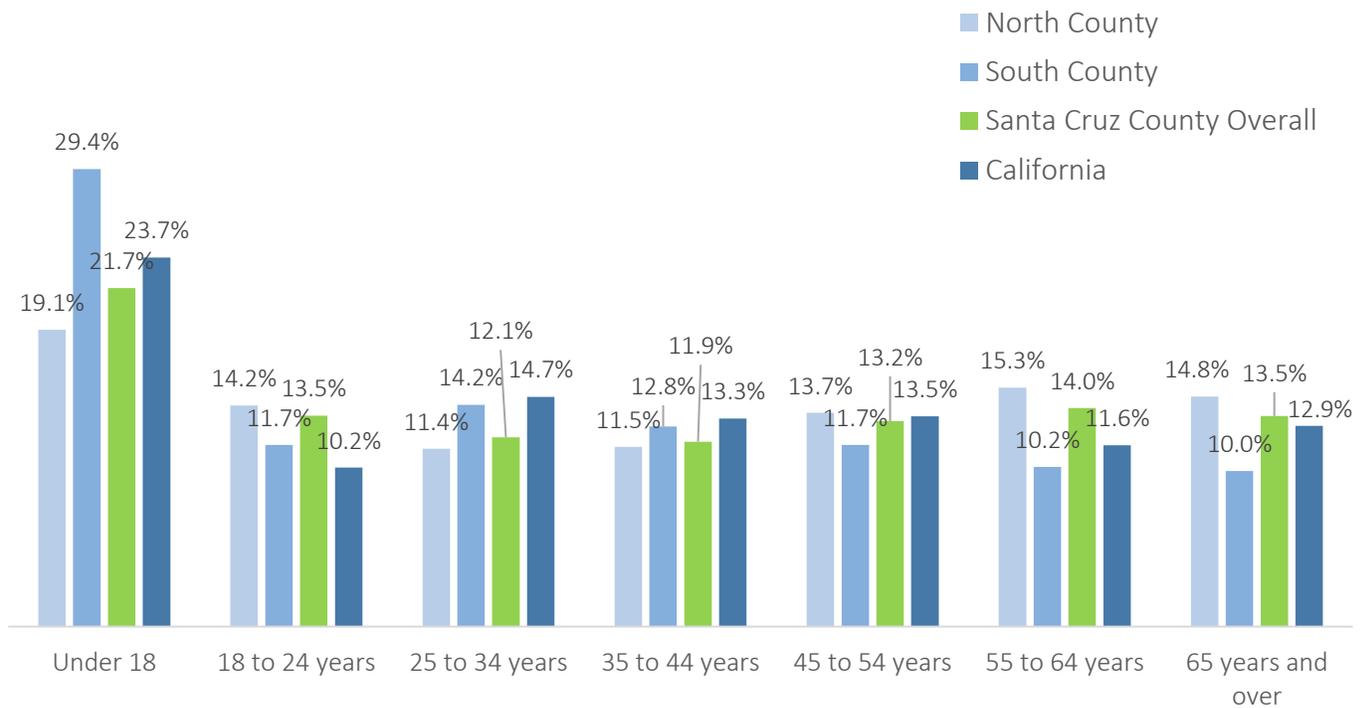


Figure 11. Age Distribution by Sub-Region, 2016¹³



¹² U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

¹³ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Educational Attainment, Language, and Ethnicity

Overall, Santa Cruz County has more highly-educated adults (25 years and older) and fewer individuals with a high school degree or less compared to the state and nationwide averages. About two in five (39 percent) adults age 25 or older in Santa Cruz County have a Bachelor's degree or more; this is higher than both the respective state and nationwide averages of 33 and 30 percent.

However, by sub-region, South County has a significantly higher proportion of adults with a high school education or lower—about two times the proportion of total adults compared to the countywide average (Figure 12). It is important to note that South County's population is also largely comprised of individuals under 25 years of age. Forty-one percent of the sub-region is 24 years old or younger; this is significantly higher compared to North County (33 percent) and the County overall (35 percent) (Figure 11).

Santa Cruz County has a higher proportion of White residents compared to the statewide average of 38 percent. In Santa Cruz, 58 percent of residents are White and another 33 percent are of Hispanic or Latino background (Figure 14). Ethnicity varies greatly across the Northern and Southern regions. North County is predominantly White (72 percent) while South County is predominantly Hispanic (77 percent); these distributions are significantly different from the overall regional average (Table 17).

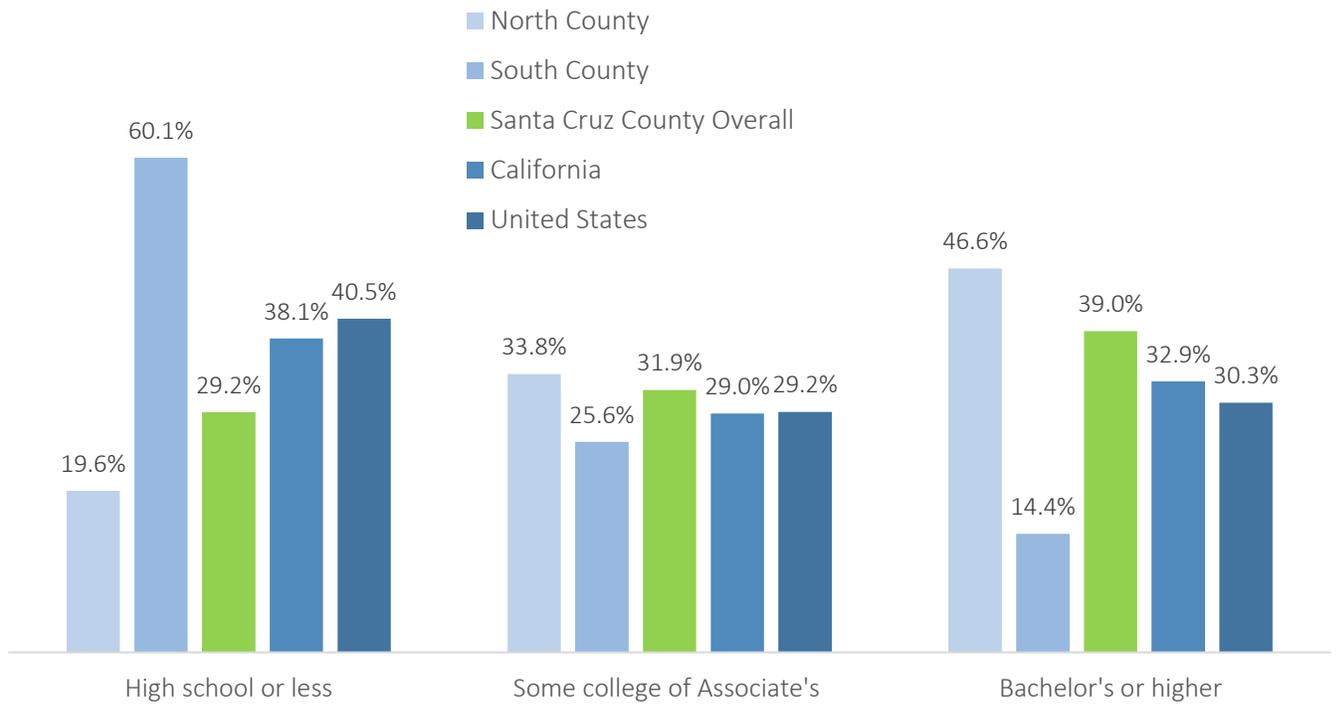
Education and Ethnicity Summary

In general, Santa Cruz County has a highly-educated workforce with at least a Bachelor's degree or more—six to nine points higher than state or nationwide averages. However, educational attainment varies significantly within the County, as six in ten adults in South County have only a high school diploma or less; this is double the countywide proportion. Ethnicity also varies greatly by sub-region. Overall, the proportion of White residents in the County is 20 points higher than the statewide average. In North County, almost three-quarters of the population is White while in South County just over three-quarters of the population is Hispanic or Latino.

Why is this Important?

Educational attainment provides an assessment of the overall talent and skill base that is available for a region's businesses. Differences in educational attainment by region also identify where populations might require more targeted training and education programs. In the same way, sub-county differences in ethnicity highlight areas that might require different workforce development initiatives and training programs to better support the population's needs.

Figure 12. Educational Attainment for Population 25 Years and Over by Sub-Region, 2016¹⁴



¹⁴ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Figure 13. Percent of Population 25 Years and Over with High School Diploma or Less by Zip Code, 2016

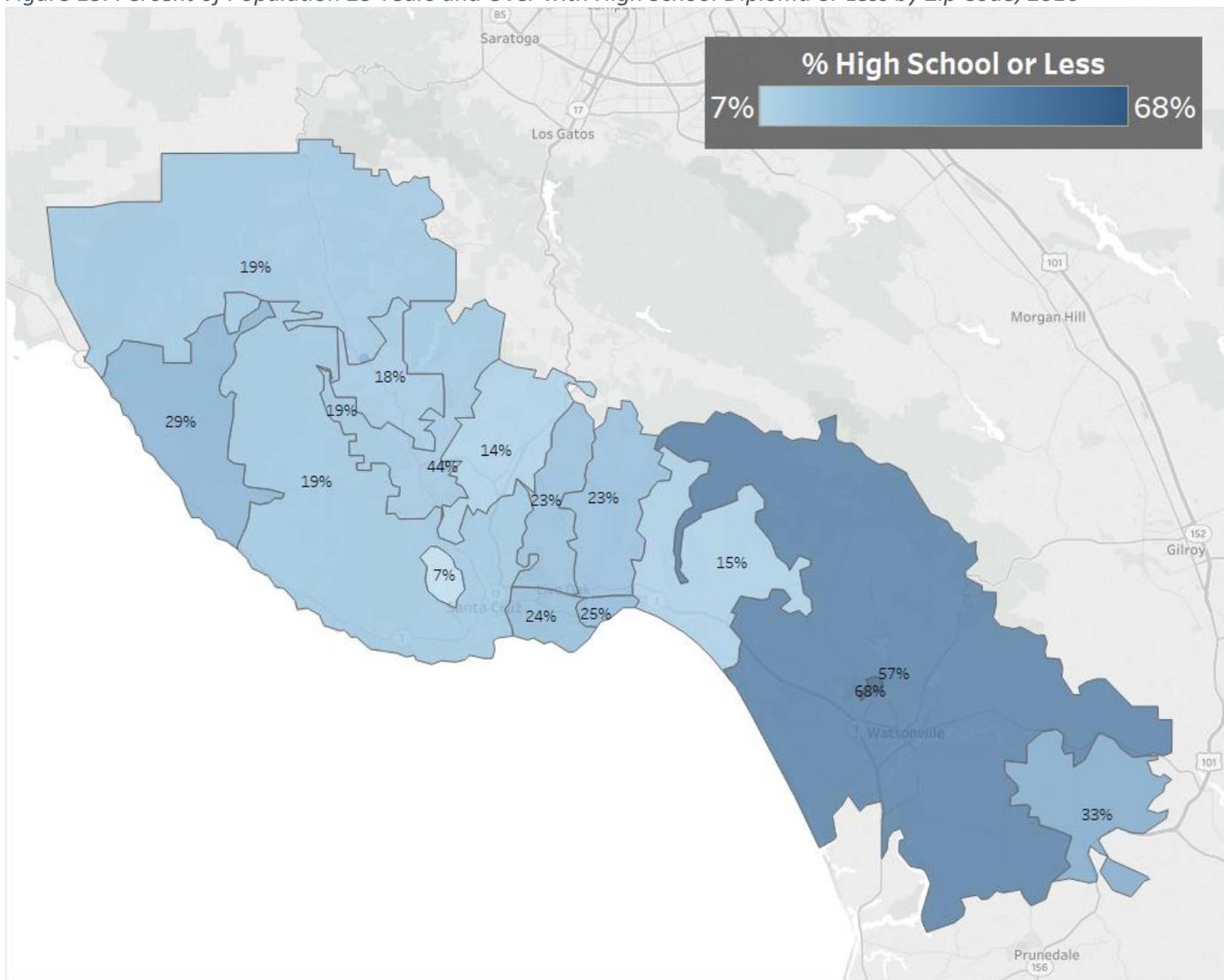


Figure 14. Ethnicity in Santa Cruz County, 2016¹⁵

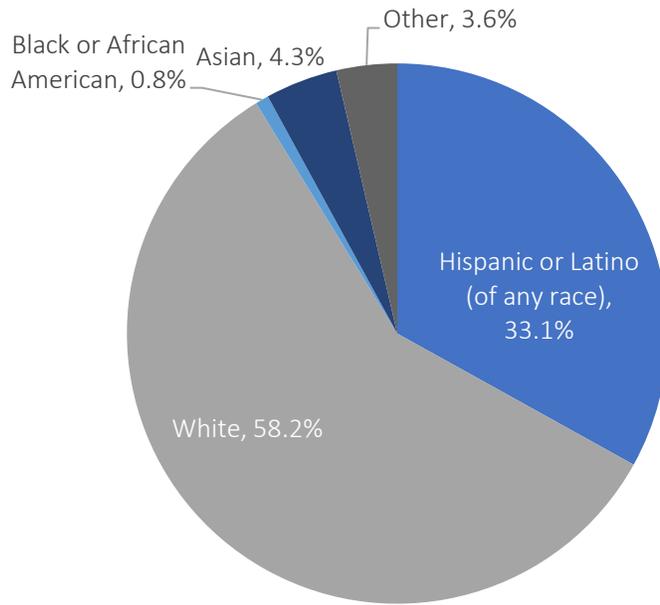


Table 17. Ethnicity by Sub-Region, 2016¹⁶

	Santa Cruz County	North Santa Cruz	South Santa Cruz	California
White	58.2%	72.0%	18.8%	38.4%
Hispanic or Latino (of any race)	33.1%	17.9%	76.5%	38.6%
Asian	4.3%	4.9%	2.8%	13.7%
Black or African American	0.8%	0.9%	0.4%	5.6%
Other	3.6%	4.3%	1.6%	3.8%

¹⁵ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

¹⁶ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Socioeconomic Profile

The following section highlights income distribution as well as the proportion of household income that must be spent on rent or mortgage payments for residents across Santa Cruz County. Examining household incomes indicates what proportion of residents in the County are able to sustainably afford the higher-than-average costs of living. Exploring this metric for sub-county segments also provides a measure of the level of income inequality in Santa Cruz County. In the same way, identifying the proportion of homes that must spend more than a third of their household income on rents or mortgage payments is an indicator of the region's ability to supply affordable housing for residents.

Housing and Income Distribution

The household income distribution in Santa Cruz County is roughly similar to the statewide average, with a slightly higher proportion of homes that earn \$150,000 a more or more—19 percent in the County compared to 16 percent for the state. About three-quarters of households across the County earn at least \$35,000 per year or more, and almost half earn at least \$75,000 a year (Figure 15). Household income distributions vary slightly by sub-county regions. In general, 26 percent of households in Santa Cruz County make less than \$35,000 annually; this is lower for North County residents (24.7 percent) but higher for South County residents (30.8 percent). By the same token, the proportion of North County residents earning \$150,000 or more is almost 14 points higher than South County (Table 18).

The uneven household income distribution within the County is also reflected in regional housing affordability. In general, residents in Santa Cruz County face higher housing costs than the statewide average. In fact, the County has been identified as the fourth least affordable housing market in the world.¹⁷ The median price of a home as of April 2018 was \$920,600 in Santa Cruz County compared to \$542,900 for California. And while median rent is only slightly higher than the California average—\$3,000 in the County compared to \$2,700 across the

Housing and Income Summary

Almost half of households in Santa Cruz County make at least \$75,000 per year or more—about 3.4 points higher than the statewide average. This varies by region, as South County has a higher proportion of homes that earn less than \$35,000 compared to countywide average and North County. With one of the most unaffordable housing markets in the world, South County residents are most likely to spend more than a third of their income on rent.

Why is this Important?

Affordable housing is an indicator of regional economic vitality. Housing costs are most often the primary expense for a household, and the cost of housing impacts not only quality of life, but also labor supply for businesses—higher costs might drive residents out of the region while deterring potential jobseekers from moving in. Furthermore, if unaffordable housing prompts workers to move to more out and commute to the City of [?] Santa Cruz for work, this can have the adverse effect of increasing traffic, commute times, and wear on roads. Long commutes affect both quality of life and productivity; workers that spend more time in traffic have less time to dedicate to both work and other activities such as family time, community work, or on mental and physical health and well-being.

¹⁷ KSBW. *Santa Cruz: 4th least affordable real estate in the world?* 13 December 2017.

state—renters are still much more likely to spend more than a third of their household income on rents.¹⁸ Over half of renters (51 percent) spend 35 percent or more of household income on rent, and roughly 35 percent of homeowners do the same for a monthly mortgage (Figure 16). In South County, the proportion of residents who spend more than a third of household income on rent and mortgage payments is slightly higher compared to the countywide average—roughly two to three percentage points.

Figure 15. Household Income Distribution by Region, 2016¹⁹

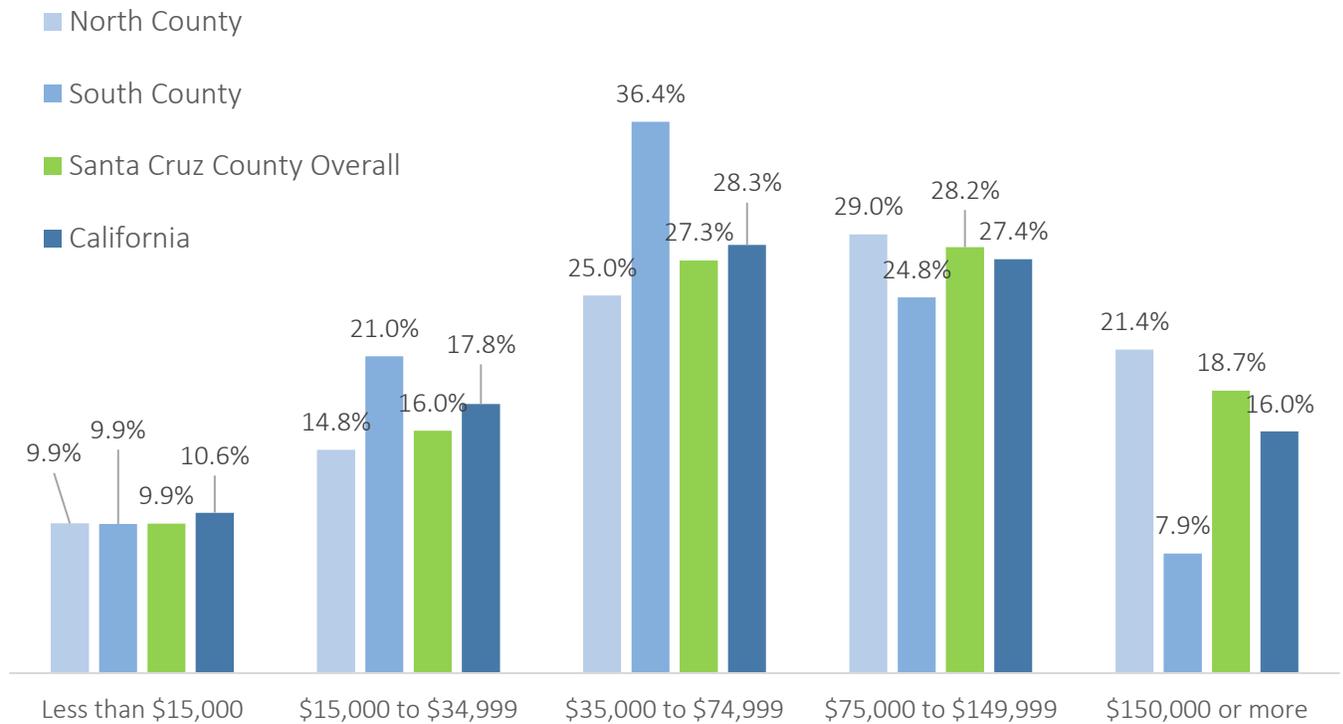


Table 18. Household Income Distribution by Region, 2016²⁰

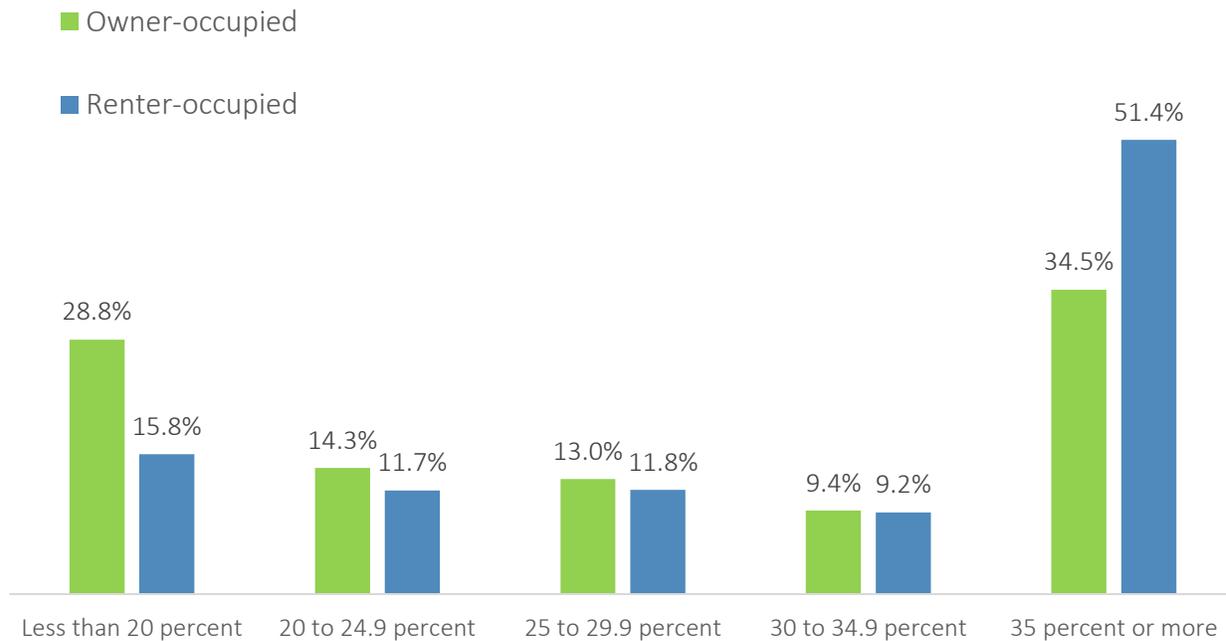
	Less than \$35,000	\$150,000 or more
Santa Cruz County	25.9%	18.7%
North County	24.7%	21.4%
South County	30.8%	7.9%
California	28.4%	16.0%
United States	32.2%	11.1%

¹⁸ Zillow Home Value Index (ZHVI), measures median valuation for a given geographic area on a given day. Data through 30 April 2018.

¹⁹ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

²⁰ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Figure 16. Monthly Housing Costs as a Percentage of Household Income, 2016²¹



²¹ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Resident Commute Patterns

Seven in ten workers across Santa Cruz County drove to work alone in 2016, while another nine percent carpoolled to work. The proportion of workers that utilized public transportation is low—about three percent—but eight percent of workers did report either walking or biking to work. By sub-region the distribution is roughly similar, though South County has more workers that carpool or use a taxicab or motorcycle to get to work (Figure 17).

Travel time for Santa Cruz County workers is largely under 30 minutes. Just under a third of workers report that their total commute to work is under 15 minutes, and an additional third note that their travel time is 15 to 29 minutes. Compared to the statewide average, Santa Cruz County workers generally face shorter commute times (Figure 18).

Commute Summary

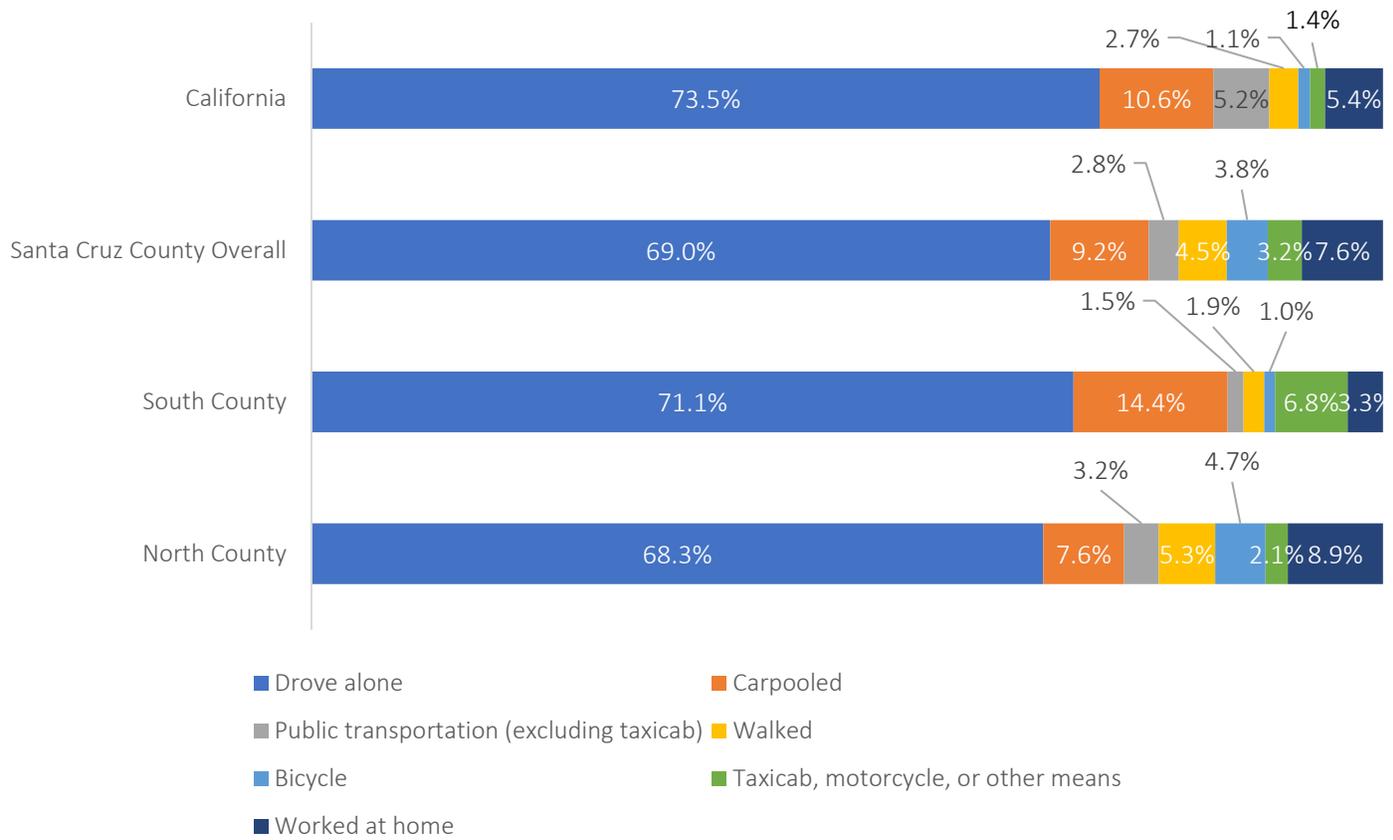
The majority of residents drive alone to get to work. South County residents are more likely to carpool or take a taxicab or motorcycle to get to work.

Santa Cruz County residents have shorter commute times on average compared to California residents overall.

Why is this Important?

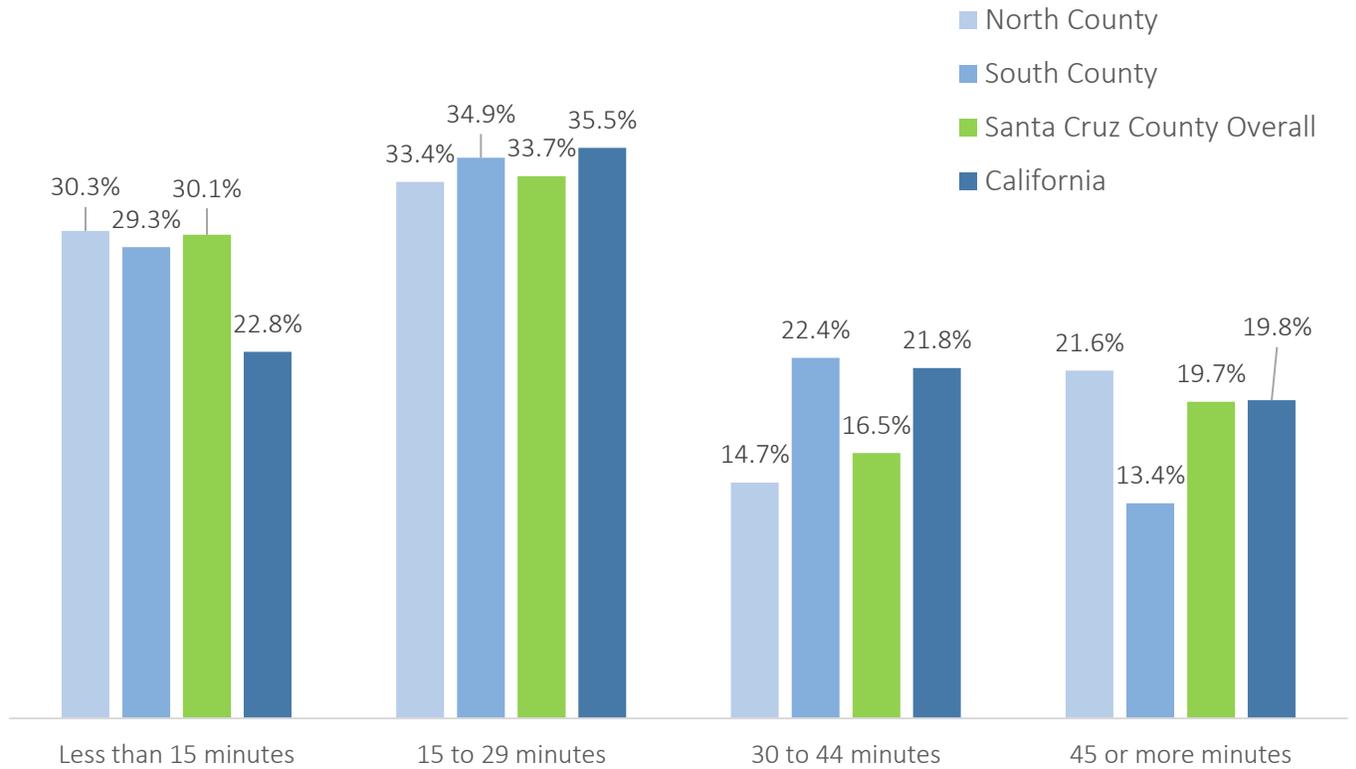
Commute times and behavior have a considerable impact on residents' perceived quality of life. As mentioned above in the housing affordability section, inefficient or lengthy commuting can affect both productivity at work and the overall health and well-being of a community's residents.

Figure 17. Means of Transportation to Work for Workers 16 Years and Over, 2016²²



²² U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Figure 18. Travel Time to Work for Workers 16 Years and Over by Region, 2016²³



²³ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Resident versus Regional Workforce

The following section examines the gap in Santa Cruz County’s resident workforce against the number of individuals working in the County—regardless of residence. This analysis provides insight as to how the region is either a net importer or exporter of specific talents and skillsets by occupational categories.

Santa Cruz County’s resident workforce—those individuals that live in Santa Cruz County and work either in the region or outside of it—is larger than the number of individuals working in Santa Cruz County alone. There are a total of 132,206 resident workers who live in Santa Cruz County compared to 107,617 individuals that work in Santa Cruz County. The difference of almost 25,000 workers indicates that the region is a net exporter of talent to neighboring economies, meaning 25,000 workers in Santa Cruz County leave the region for work every day. The region is a net exporter for workers at all skill levels. While there are almost 54,000 residents employed in management, business, science, and arts occupations, there are only 32,067 such jobs in the County. The same is true for service, sales and office, construction, and transportation occupations, meaning the region is a net exporter of both high-skill, high-wage talent as well as lower-skill, lower-wage occupations (Figure 19).

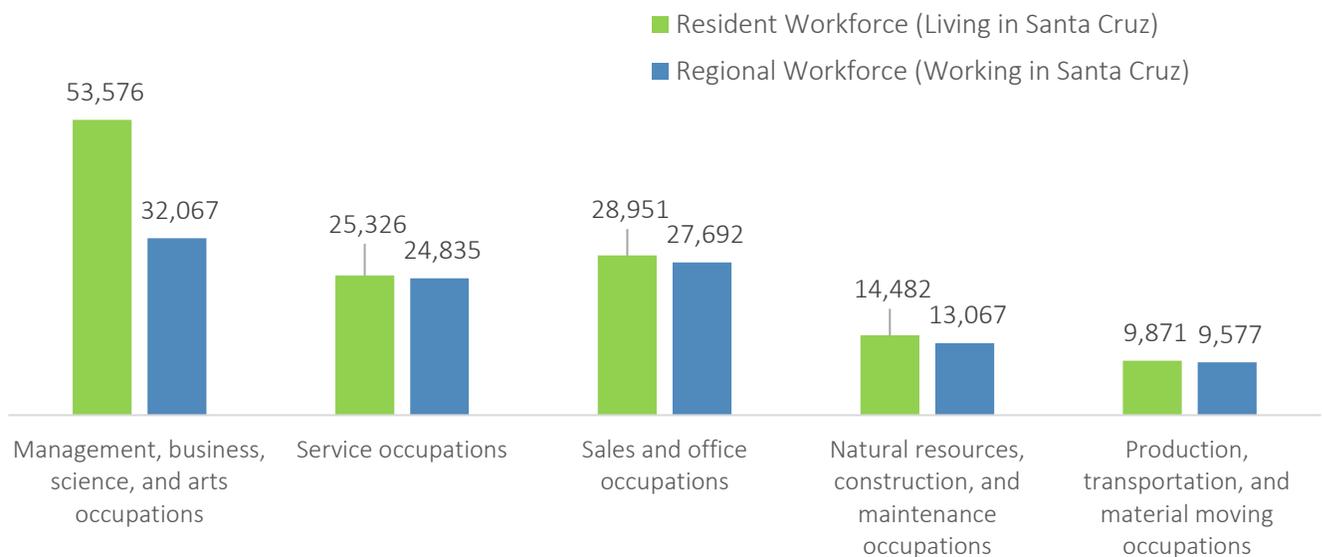
Talent Summary

Santa Cruz County is a net exporter of workers at all skill levels to neighboring regions.

Why is this Important?

This metric measures how a region’s workforce overlays with available jobs in the area. More residents leaving the region for work further highlights Santa Cruz County’s challenge of supplying enough jobs for the region’s workers.

Figure 19. Resident versus Regional Workforce, 2016²⁴



²⁴ U.S. Census Bureau, American Community Survey. 2016 5-Year Estimates. Extracted April 2018.

Conclusions and Next Steps Summary

The data presented in this report provides an overview of Santa Cruz County's economic and workforce landscape, with particular attention to industry clusters, job quality and cost of living, talent and educational characteristics, and career pathway opportunities. In general, countywide job growth has been positive over the last several years and there are significant opportunities for career pathway and workforce development initiatives surrounding four primary industry clusters in the region. However, jobseekers in Santa Cruz County do face some headwinds, as the majority of employment opportunities remain concentrated in low-skill, low-wage occupations and there are generally not enough jobs to support the region's population. These low-wage job prospects combined with above-average costs of living are affecting economic self-sufficiency for residents across the County. In particular, South County residents face more barriers to economic opportunity compared to their northern neighbors. With slower job growth, higher unemployment rates, and low educational attainment and average earnings, the region requires additional workforce development support.

To improve both economic security and equality in Santa Cruz County, the research team identified the following next steps or areas of focus for Santa Cruz County's Workforce Development Board. These recommendations seek to foster sustainable employment growth, expand access to education, and improve quality of life for residents across the county.

Engage relevant stakeholders to develop an education network that reaches out to underutilized potential. There is untapped talent potential in the youth and young adults of South County, yet these individuals lack the education or training to enter into one of the region's high-wage industry clusters. A regionally coordinated program or strategy that supports both technical and non-technical skill attainment could prepare young adults for the world of work. This could also include expansion of access not only to higher education, but more importantly internships, apprenticeships, and on-the-job training opportunities. Such a strategy would ideally link up with early childhood education providers and engage other stakeholders to develop a partnership across the region with the business community, educators, and workforce development programs.

Support local job creation by attracting new businesses to the region. With the region's high costs of living and limited supply of high quality jobs, it is important for Santa Cruz County to not only recruit high-wage businesses to the region but also support current industry clusters to grow and create more jobs. Expansion of free business planning infrastructure and resources that support business owners and entrepreneurs will be vital to fostering healthy firm growth in Santa Cruz County; this would also include increasing business awareness and connectivity to such resources.

Understand the challenges of Santa Cruz County residents. The region faces high turnover and low retention rates due to cost of living. In fact, many employers invest in training workers for higher-skill, higher-wage positions, but once these workers have gained experience and training, they often leave the region. The Workforce Development Board may consider surveying residents to understand specific challenges such as housing and other costs of living, commuting, or job availability. Such a metric could help develop strategic plans to retain more talent in the region.

Appendix A: Regional Definition

City	Zip	Location
Aptos	95001	North County
Aptos	95003	North County
Aromas	95004	South County
Ben Lomond	95005	North County
Boulder Creek	95006	North County
Brookdale	95007	North County
Capitola	95010	North County
Davenport	95017	North County
Felton	95018	North County
Freedom	95019	South County
Mount Hermon	95041	North County
Santa Cruz	95060	North County
Santa Cruz	95061	North County
Santa Cruz	95062	North County
Santa Cruz	95063	North County
Santa Cruz	95064	North County
Santa Cruz	95065	North County
Scotts Valley	95066	North County
Santa Cruz	95067	North County
Soquel	95073	North County
Watsonville	95076	South County
Watsonville	95077	South County