



TheRPGroup

Research, Planning & Professional Development
for California Community Colleges

SM

Santa Barbara City College

Regional Scan

October 2023

www.rpgroup.org

Table of Contents

Table of Contents	2
Overview	3
Reader’s Guide	3
Methodology	3
Highlights from the Regional Scan	4
Key Implications	5
Population and Demographic Trends	5
How has the population changed over time in the region?	5
How has the distribution of race/ethnicity changed in the population over time?	6
How has the distribution of age changed in the population over time?	7
How has the distribution of gender changed in the population over time?	9
K-12 Enrollment and High School Graduation Patterns	10
How have K-12 enrollments changed over time?	10
How has the number of high school graduates changed over time?	10
How has the number of high school graduates meeting UC/CSU requirements changed over time?	11
Workforce and Labor Market Information	12
How has the unemployment rate changed over time?	12
How has employment growth changed over time?	13
How has employment changed across industries?	14
Which occupations have experienced the most growth over time?	15
Socioeconomic Indicators	18
How has the level of educational attainment changed over time?	18
How has the average household income changed over time?	19
Data Definitions	21
Data Sources	22
Research and Planning Group for California Community Colleges	23
Project Team	23
www.rpgroup.org	23

Overview

This report contains regional data and information to support the development of Santa Barbara City College’s (SBCC) Education Vision Plan. The data included in this scan provide a longitudinal look of the region based on a five-year historical review. The external scan is intended to provide a high-level summary of the following key areas:

- [Population and Demographic Trends](#)
- [K-12 Enrollment and Graduation Patterns](#)
- [Workforce Information and Labor Market Information](#)
- [Socioeconomic Indicators](#)

Reader’s Guide

This report provides insights into the local community surrounding SBCC and how it has changed in recent years. It begins with an overview of the methodology used to compile and synthesize the data, followed by highlights from the regional scan. Next, the report summarizes the key areas examined in the scan, which include: Population and Demographic Trends, K-12 Enrollment and Graduation Patterns, Workforce Information and Labor Market Information, and Socioeconomic Indicators. The report concludes with implications for the college to consider based on the observed trends and recommendations on how the information can be used to support and inform the educational vision planning process at SBCC.

Methodology

The majority of the trends captured in this external scan are based on a five-year period from 2017 to 2021, but some areas in the report may reflect different timeframes based on the data source used in the analysis. Efforts were made to ensure consistency in the timeframe, unit of measurement, and geographic unit reported across sections of the report; however, given that multiple data sources were integrated into this scan, some natural variation in how the regional trends are reported is to be expected. Trends are primarily reported at the county level, but SBCC service area data are included where possible.¹

County: Santa Barbara County is bordered by San Luis Obispo County, Ventura County, and Kern County. It is the 21st largest county in California by total area and spans 2,733 square miles of land.

Service Area: The SBCC service area is the South County, or South Coast, region of Santa Barbara County. It is comprised of ten Census-designated ZIP code tabulation areas from

¹ Refer to this [link](#) for the methodological notes and limitations for the regional data sources.

Carpinteria to Gaviota. It includes the cities of Carpinteria, Santa Barbara, Goleta, and other unincorporated communities.

Highlights from the Regional Scan

The following highlights provide a snapshot of the key trends and observations that emerged from the examination of the regional data. They offer a holistic outlook on the landscape and shifting characteristics of Santa Barbara County during the five-year reporting period included in this report.

Population Growth: The total population in Santa Barbara County has **experienced sustained, incremental growth**. The county population grew each year in the reporting period, with the greatest increase occurring between 2020 and 2021. The county population is expected to expand at an annual average rate of 0.4% per year from 2021 to 2026, reaching approximately 460,000 residents.

Diversity in the Region: The demographic profile of the county has **remained relatively unchanged** with only slight shifts in the underlying population characteristics. The Hispanic/Latino population and the White (non-Hispanic) population continue to make up the two largest ethnic groups in the county, and the 19 and under age group remains the largest segment of the population.

High School Pipeline: K-12 **enrollments continue to decline**; however, the number of high school **graduates in the county is on the rise**, as is the number of graduates who meet UC/CSU requirements.

Unemployment: Unemployment rates in Santa Barbara County were starting to drop, but jumped back up in 2020 due to economic uncertainty and job loss during the pandemic. Unemployment rates are trending downward once again, but still **remain higher than pre-pandemic rates**.

Industry Clusters: Following the pandemic, there has been general **employment growth in all industries** and most have returned to pre-pandemic employment with **Professional and Business Services** growing beyond pre-pandemic numbers. The greatest growth was observed across the **Leisure and Hospitality** sector.

Income and Educational Attainment: The county has a **high level of educational attainment and household income**, but there are **pockets of poverty** and economic uncertainty that are particularly challenging given the high cost of living in the area.

Housing Affordability: Santa Barbara County continues to face **challenges related to housing affordability and availability**, particularly for low- and middle-income residents. Since the pandemic, the average cost of rent has increased 41%.

Key Implications

Based on the highlights above, we have identified the following key implications for the three divisions to consider:

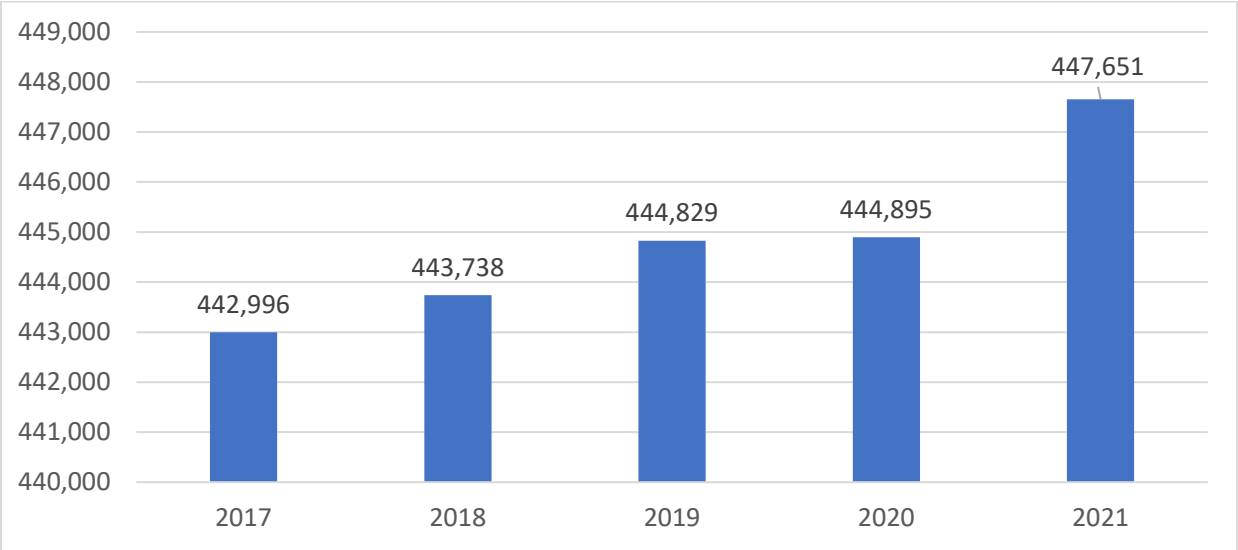
- The challenges students face around housing, transportation, and meeting basic needs extend to SBCC staff.
- Adult learners will become a greater focus as the high school population declines and employment opportunities in the region change.
- Need to balance growth in low-wage jobs with equitable employment outcomes (i.e., living wage).

Population and Demographic Trends

How has the population changed over time in the region?

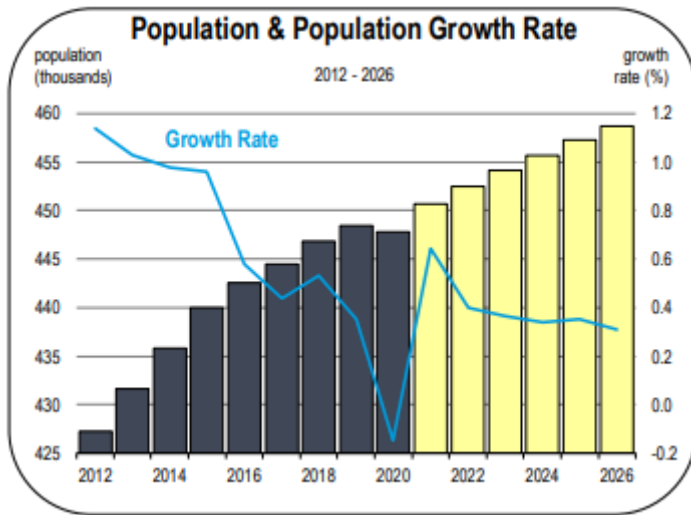
County: Santa Barbara County's population experienced continued growth every year from 2017 to 2021 (Figure 1). Its largest annual population increase occurred between 2020 and 2021 with a 0.6% rise, going from 444,895 to 447,651 residents. The Santa Barbara County population is expected to expand slowly between 2021 and 2026, at an annual average rate of 0.4%, approaching 460,000 residents (Figure 2).

Figure 1. Population of Santa Barbara County, 2017 to 2021



Source: ACS 5-Year Estimates Data Profiles

Figure 2. Projected Population of Santa Barbara County, 2021-2026

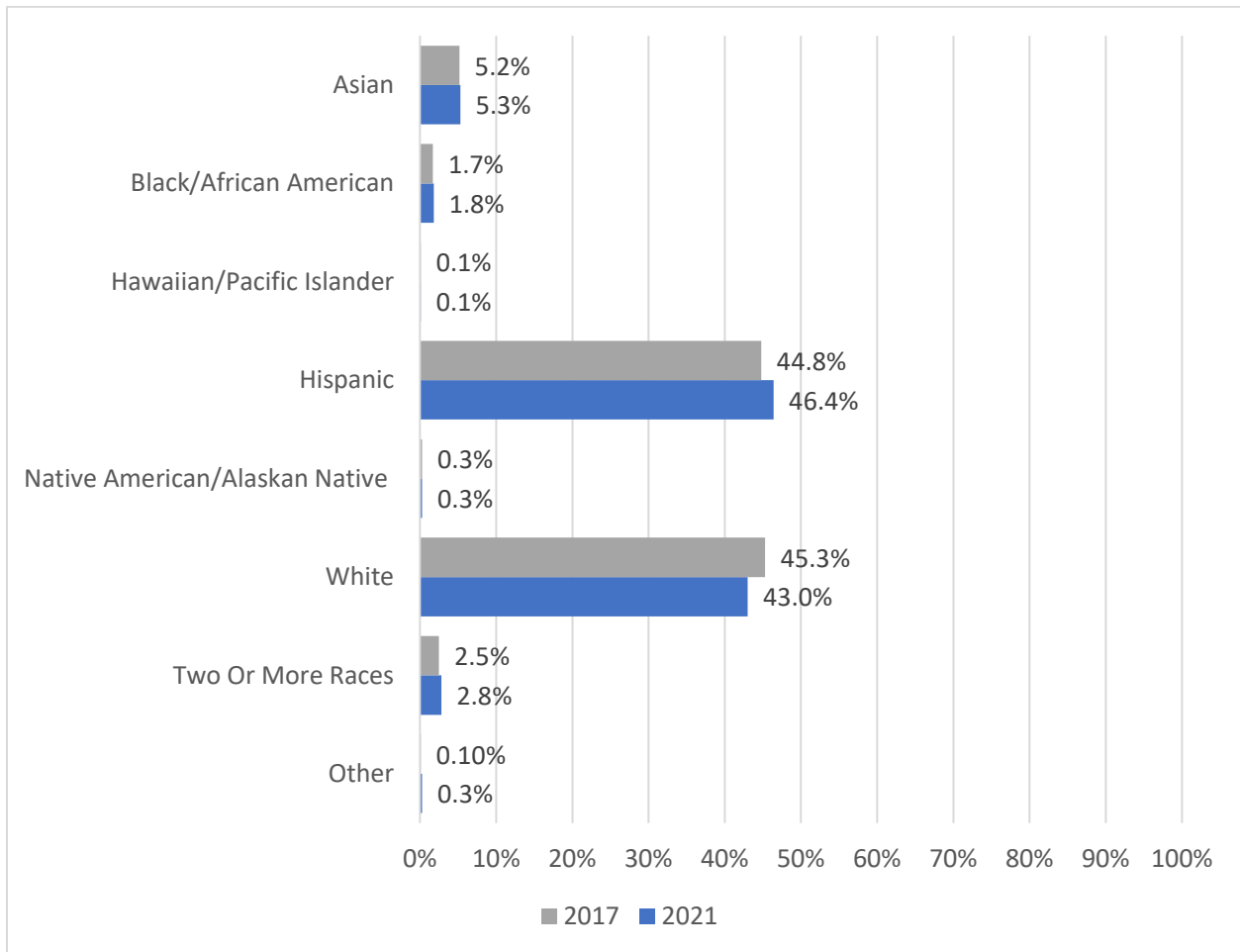


Source: Department of Transportation County-Level Economic Forecast

How has the distribution of race/ethnicity changed in the population over time?

County: In 2021, the two largest ethnic groups in the county were the Hispanic/Latino population (46.4%) and the White (non-Hispanic) population (43.0%) (Figure 3). Combined, these two ethnic groups accounted for 89.4% of the ethnic diversity in the county. The Hispanic/Latino population experienced the largest growth of any ethnic group, increasing 1.6% between 2017 and 2021, while the White (non-Hispanic) population had the largest decrease of any ethnic group, dropping 2.3% in that same time period.

Figure 3. Population Distribution of Santa Barbara County by Race/Ethnicity, 2017 to 2021

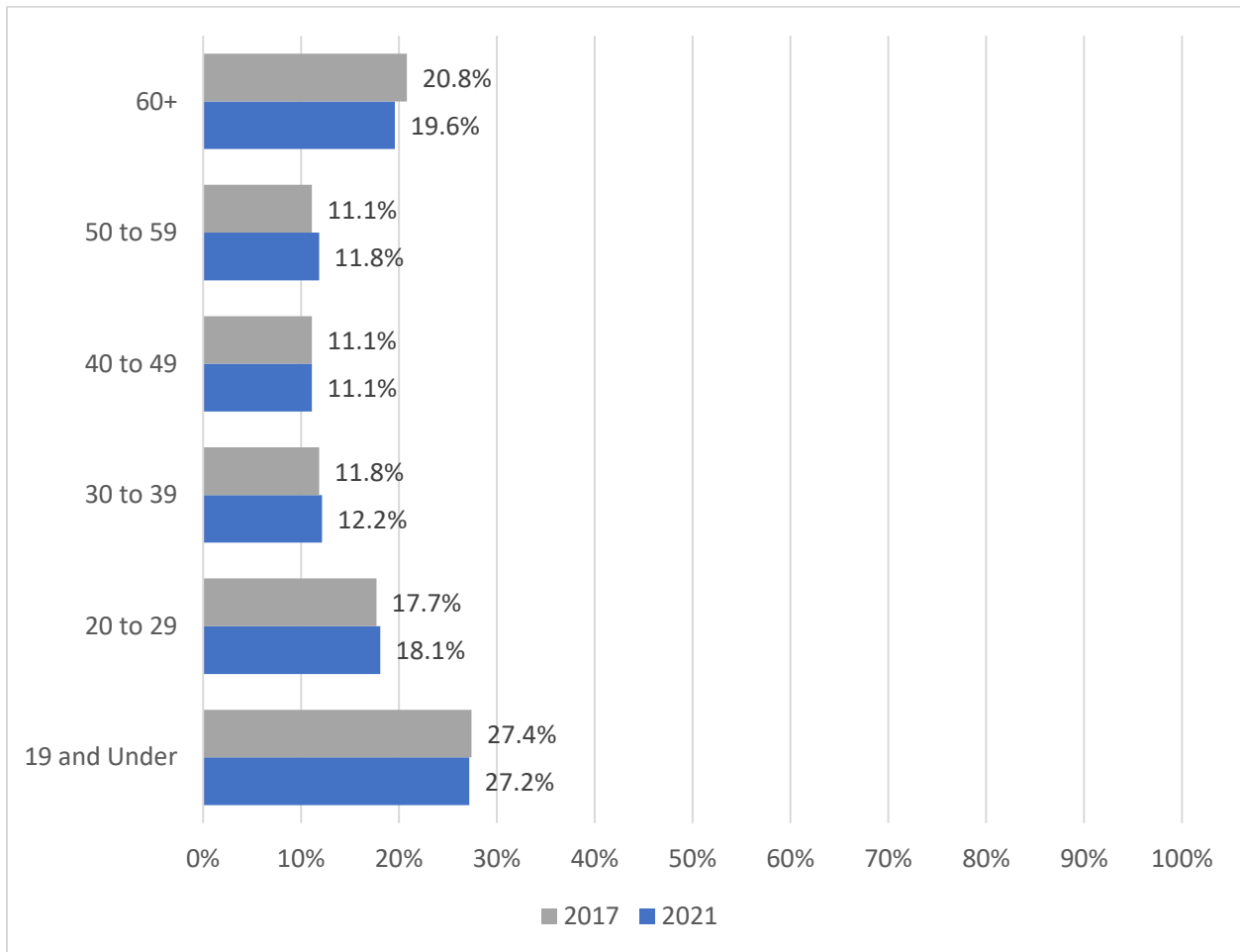


Source: ACS 5-Year Estimates Data Profiles

How has the distribution of age changed in the population over time?

County: The proportion of individuals within each age group remained relatively unchanged between 2017 and 2021 (Figure 4). There was a slight increase (0.4%) in the 20 to 29 age group and a slight decrease (1.2%) in the 60+ age group. The 19 and under age group continued to make up the largest segment of the population and comprised 27.2% of the county in 2021.

Figure 4. Population Distribution of Santa Barbara County by Age, 2017 to 2021

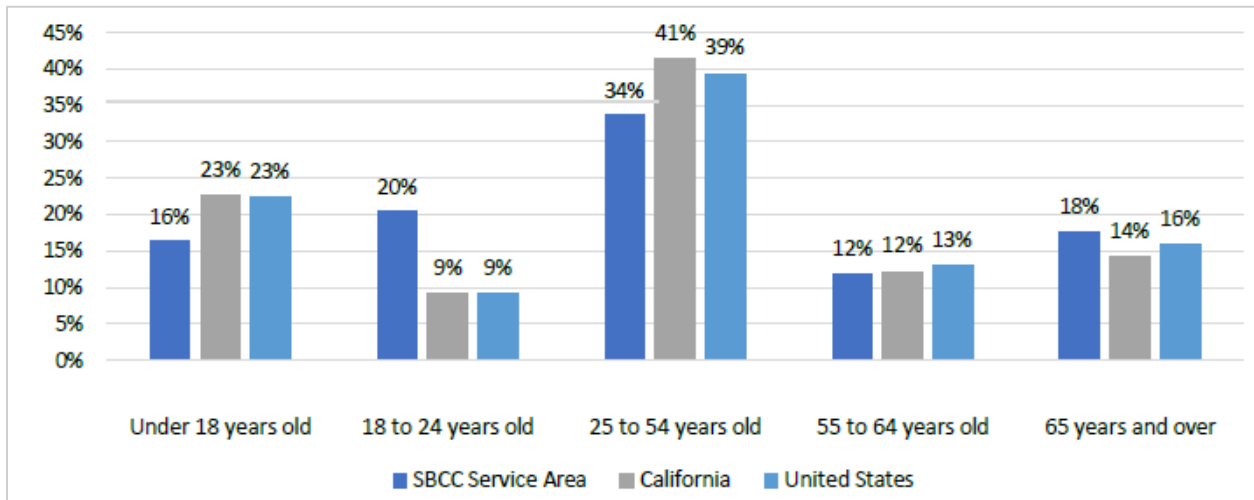


Source: ACS 5-Year Estimates Data Profiles

Service Area: In 2021, the 25 to 54 age group² made up the largest proportion of the population comprising 34% of the service area, followed by the 18 to 24 age group, which accounted for 20% of the service area (Figure 5). With the high number of educational institutions in the area, the proportion of individuals between the ages of 18 and 24 was larger than the state and national averages.

² The distribution of age in the service area is grouped differently than that of the county. Since the age range included within each category differs, the trends listed for the service area may not align with what was observed for the county.

Figure 5. Population Distribution of the Service Area by Age, 2021

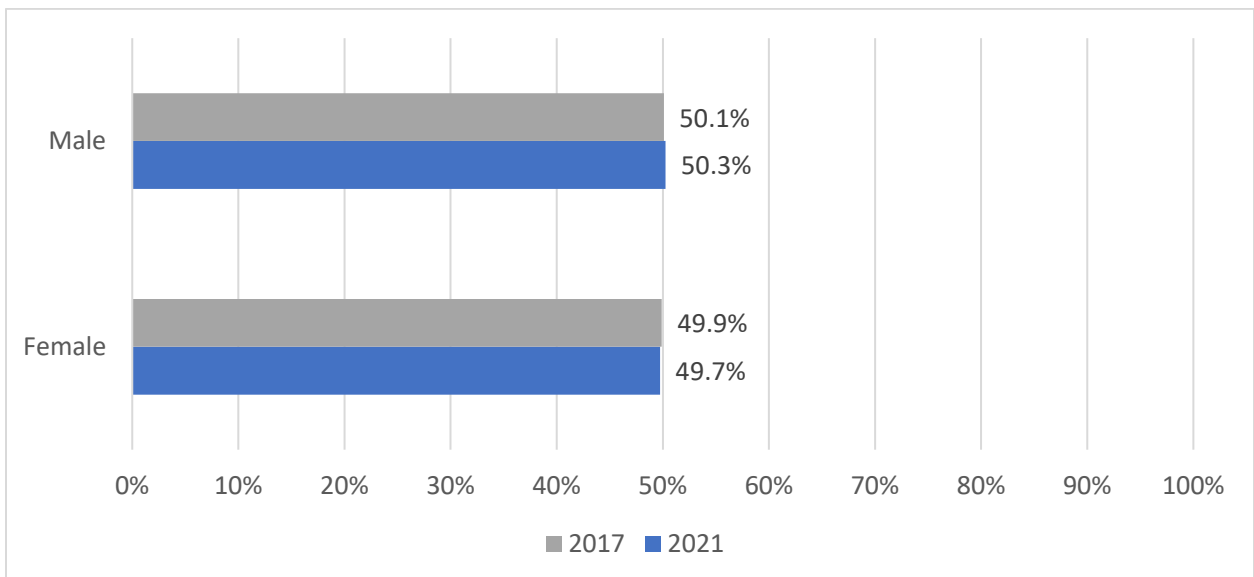


Source: BW Research Partnership

How has the distribution of gender changed in the population over time?

County: The distribution of gender in the county was stable between 2017 and 2021, with only a slight increase of 0.2% amongst the male population in that timeframe (Figure 6).

Figure 6. Population Distribution of the County by Gender, 2021



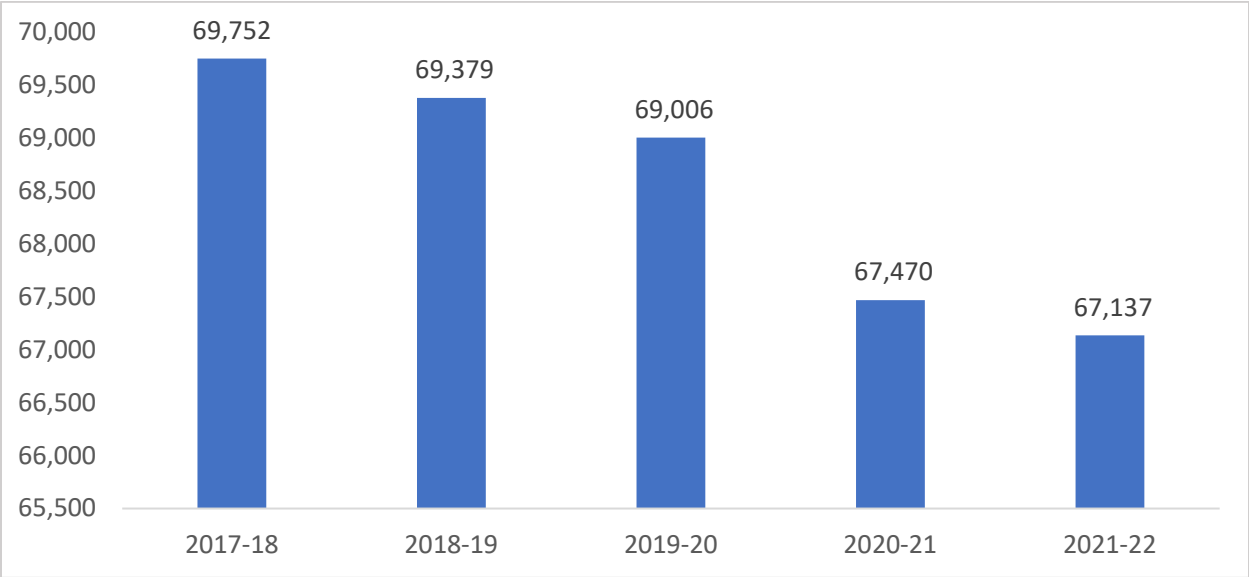
Source: ACS 5-Year Estimates Data Profiles

K-12 Enrollment and High School Graduation Patterns

How have K-12 enrollments changed over time?

County: Public K-12 enrollments declined each academic year from 2017-18 to 2021-22, decreasing 3.9% in that five-year timeframe and amounting to a loss of 2,615 enrollments (Figure 7). The largest decrease occurred in 2020-21 with a 2.8% decline resulting in a loss of 1,536 enrollments from the previous year.

Figure 7. K-12 Enrollments in Santa Barbara County, 2017-18 to 2021-22

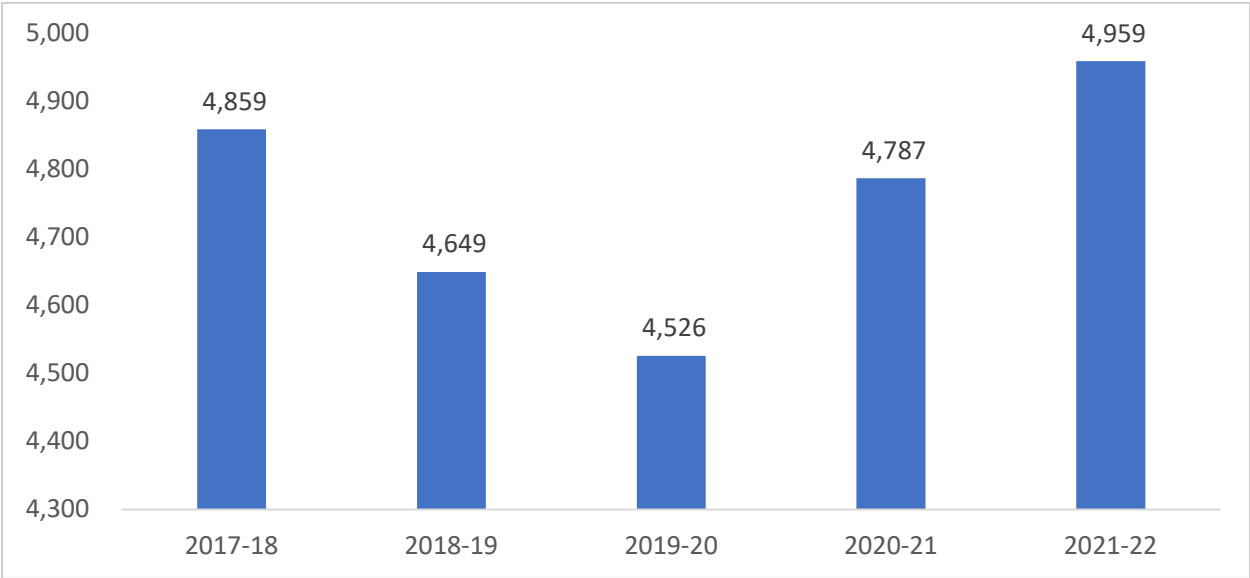


Source: California Department of Education

How has the number of high school graduates changed over time?

County: The number of students graduating high school in the county declined from 2017-18 to 2019-20, decreasing by 7.3% in that three-year period; however, this trend turned around in 2020-21 with a 5.8% increase from the previous year (Figure 8). The number of high school graduates continued to increase through 2021-22, jumping up 3.6% from the prior year. Overall, the number of high school graduates increased 2.0% in the five-year reporting period.

Figure 8. High School Graduate Counts in Santa Barbara County, 2017-18 to 2021-22

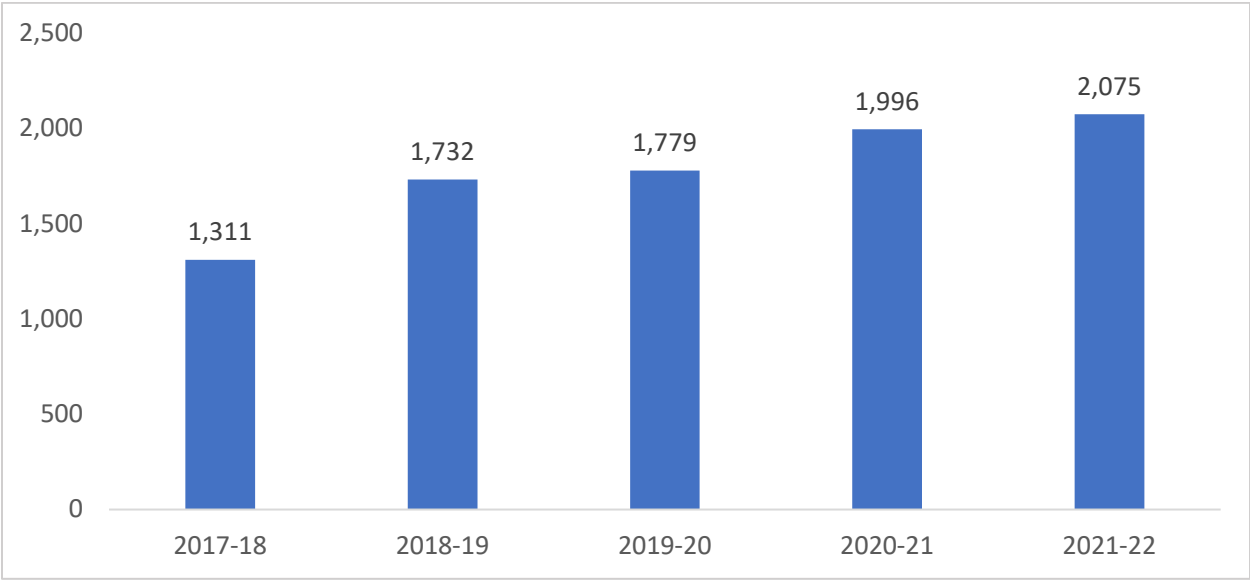


Source: California Department of Education

How has the number of high school graduates meeting UC/CSU requirements changed over time?

County: The number of high school graduates meeting UC/CSU requirements increased incrementally each year from 2017-18 to 2021-22 (Figure 9). Over the five-year reporting period, the number of high school graduates meeting UC/CSU requirements grew 58.2%, amounting to an increase of 764 students.

Figure 9. High School Graduates in Santa Barbara County Meeting UC/CSU Requirements, 2017-18 to 2021-22



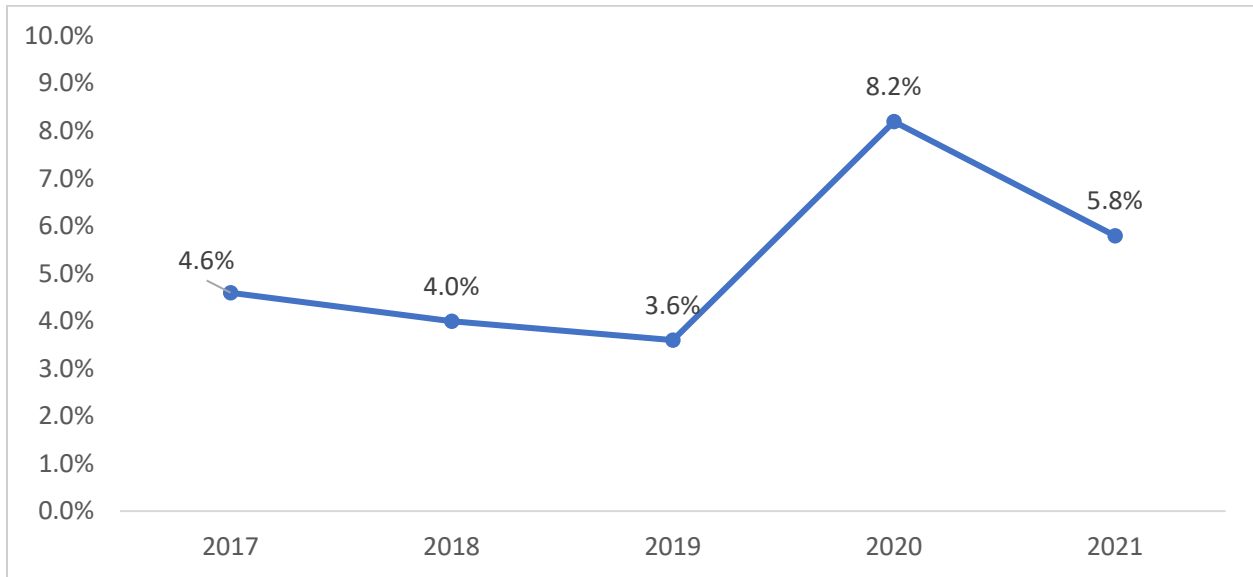
Source: California Department of Education

Workforce and Labor Market Information

How has the unemployment rate changed over time?

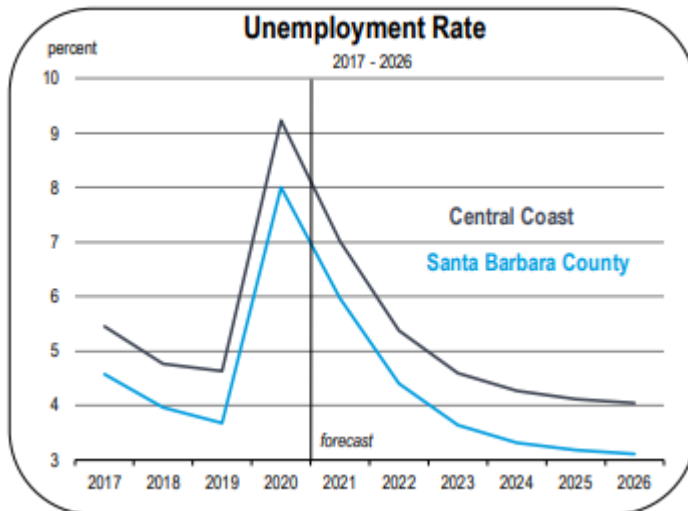
County: The unemployment rate in Santa Barbara County fluctuated over the five-year reporting period. From 2017 to 2019, the unemployment rate trended downward with incremental decreases occurring each year, going from 4.6% to 3.6% in that three-year timeframe (Figure 10). In 2020, the unemployment rate spiked to 8.2%, likely due to the pandemic, and then dropped down somewhat in 2021 to 5.8%. The unemployment rate in Santa Barbara County is expected to decrease further over the foreseeable future (Figure 11).

Figure 10. Unemployment Rates in Santa Barbara County, 2017 to 2021



Source: US Bureau of Labor Statistics

Figure 11. Projected Unemployment Rate for Santa Barbara County, 2021-2026

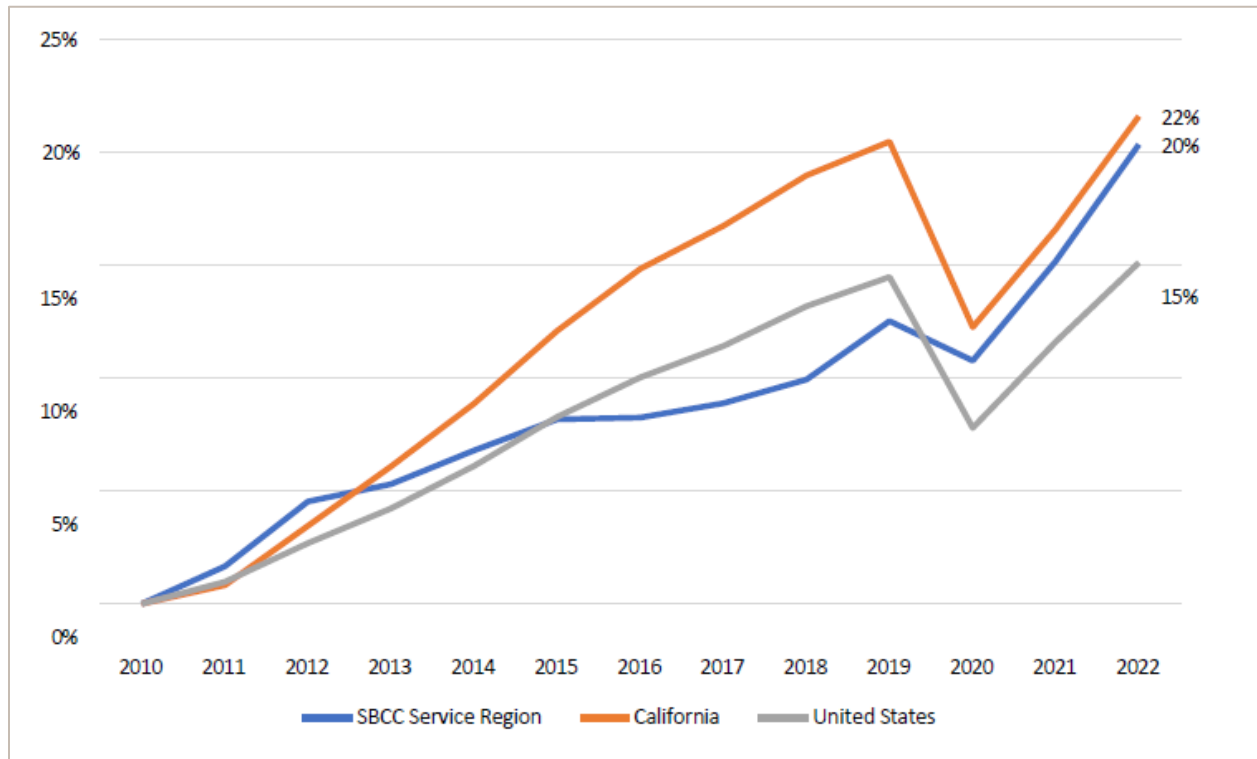


Source: Department of Transportation County-Level Economic Forecast

How has employment growth changed over time?

Service Area: In 2022, there were approximately 133,000 jobs within the service area. Since 2010, employment in the region has increased by approximately 20%, while the state has grown by 22% and the nation by 15% (Figure 12).

Figure 12. Total Employment Growth in the Service Area, 2010 to 2022

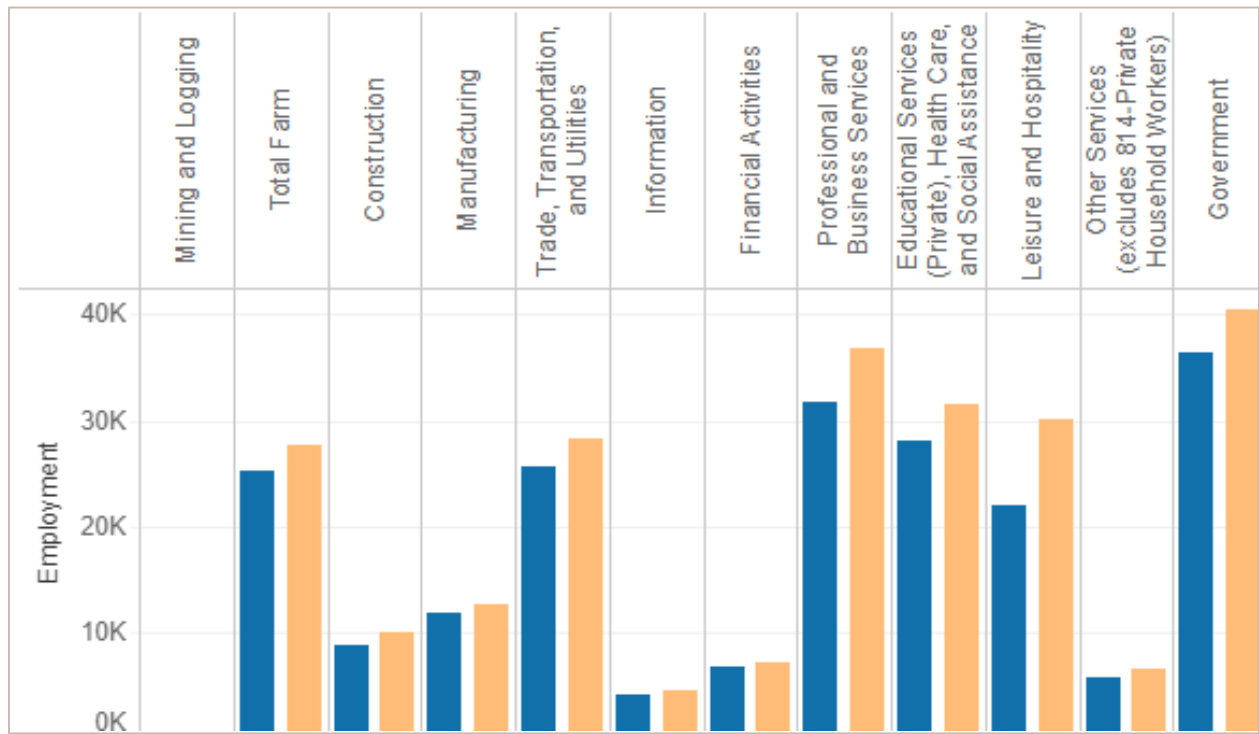


Source: BW Research Partnership

How has employment changed across industries?

County: Following the pandemic, there has been general employment growth in all industries with most industries returning to pre-pandemic employment. *Professional and Business Services*' employment is anticipated to grow beyond pre-pandemic numbers, while *Leisure and Hospitality* has will experience the most rapid growth in the county (Figure 13). Overall job growth across all industries in Santa Barbara County is projected to increase 13.4% between 2020 and 2030.

Figure 13. Employment by Industry in Santa Barbara County, 2020-2030

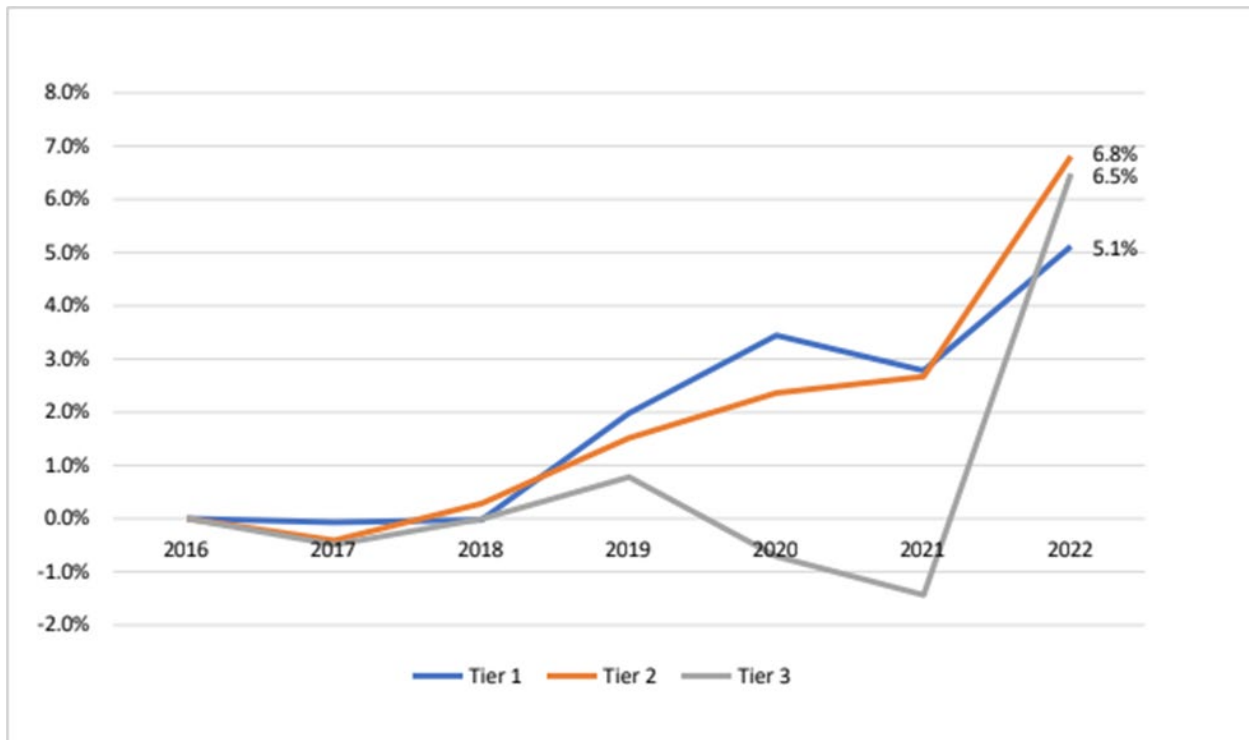


Source: Employment Development Department (EDD)

Which occupations have experienced the most growth over time?

Service Area: Since 2016, median-wage jobs (Tier 2) have seen the most employment growth (6.8%), while jobs in high-wage (Tier 1) occupations have seen the least growth (5.1%) (Figure 14). Low-wage jobs (Tier 3) were trending downward prior to the pandemic and continued to decline through 2021; however, they rebounded quickly and employment growth close matches median-wage jobs (6.5%).

Figure 14. Employment Growth in the Service Area by Occupational Tier, 2016 to 2022



Source: BW Research Partnership

Service Area: The industry clusters that experienced the greatest growth since 2016 include employment in *Professional and Business Services* with a 66% increase (Table 2) and *Finance, Insurance & Real Estate* with a 10% increase (Table 1). The service area has close to 13% of its workforce in the *Tourism, Hospitality, and Recreation* industry cluster—a cluster that, on average, has lower rates of compensation (Table 3). The tourism workforce used to be larger in the region but took a hit during the pandemic.

Table 1. High-Wage (Tier 1) Industry Cluster in the Service Area, 2016 to 2021

Industry Clusters	2021 Employment	Percent Growth since 2016	Earnings per Worker (2021)	2021 LQ
Information and Communication Technologies (ICT)	5,318	2%	\$161,949	1.38
Defense, Aerospace, and Transportation Manufacturing (DATM)	2,062	-1%	\$111,899	1.10
Biotechnology and Biomedical Devices (B&BD)	2,394	-12%	\$102,361	1.30
Energy and Environment	967	-10%	\$98,184	0.87
Finance and Banking, Insurance, Real Estate (FIRE)	5,354	10%	\$97,772	0.74
Public Services and Infrastructure	2,549	-3%	\$96,926	0.80

Source: BW Research Partnership

Table 2. Medium-Wage (Tier 2) Industry Cluster in the Service Area, 2016 to 2021

Industry Clusters	2021 Employment	percent Growth since 2016	Earnings per Worker (2021)	2021 LQ
Building and Design	9,047	11%	\$71,631	1.00
Professional and Business Services	19,821	66%	\$71,215	1.40
Education and Knowledge Creation	14,724	-1%	\$70,012	1.17
Logistics	2,958	8%	\$68,306	0.43
Other Manufacturing	1,857	-4%	\$65,392	0.40

Source: BW Research Partnership

Table 3. Low-Wage (Tier 3) Industry Cluster in the Service Area, 2016 to 2021

Industry Clusters	2021 Employment	percent Growth since 2016	Earnings per Worker	2021 LQ
Healthcare	15,626	9%	\$63,230	0.91
Other Services	6,424	-1%	\$44,120	1.04
Retail	9,655	-9%	\$40,266	0.71
Tourism, Hospitality, and Recreation	19,041	-9%	\$33,072	1.39

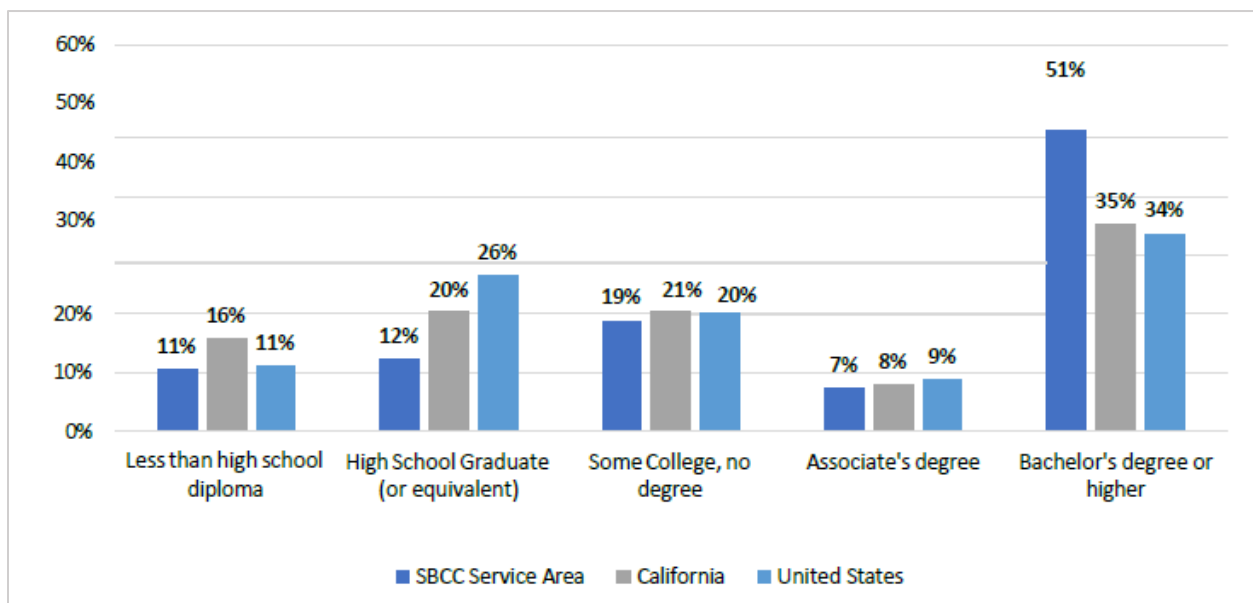
Source: BW Research Partnership

Socioeconomic Indicators

How has the level of educational attainment changed over time?

Service Area: The SBCC service area has a relatively high level of educational attainment. As of 2021, 58% of residents over the age of 25 have a Bachelor’s degree or higher, compared to 43% in California and 42% nationally (Figure 15).

Figure 15. Educational Attainment Distribution in the Service Area, 2021

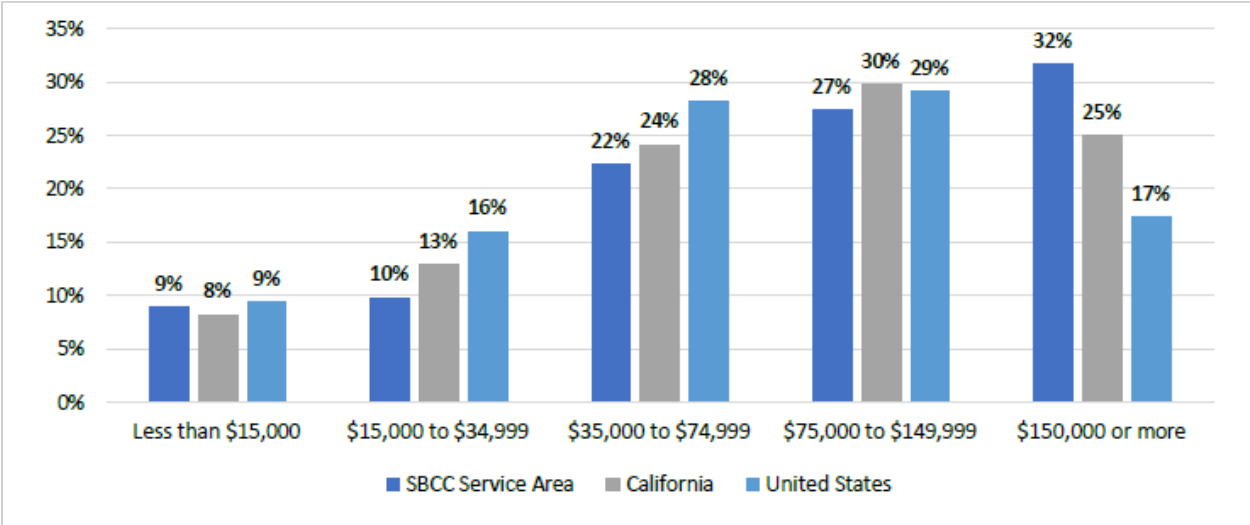


Source: BW Research Partnership

How has the average household income changed over time?

Service Area: The SBCC service area has a greater proportion of higher-income individuals and a lower proportion of lower-income individuals than state and national averages (Figure 16). More than half (59%) of the SBCC service area earns \$75,000 or more annually.

Figure 16. Household Income Distribution in the Service Area, 2021

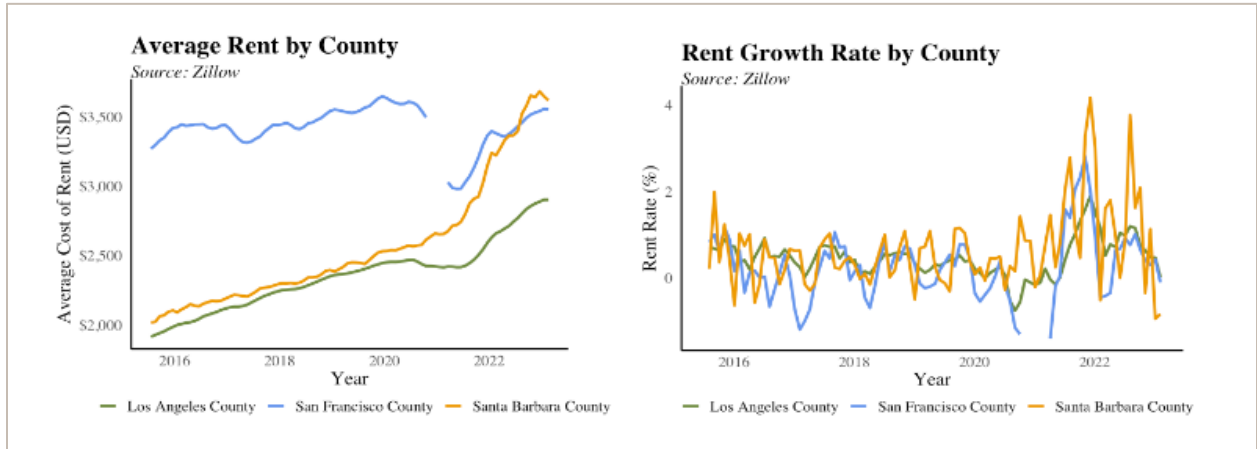


Source: BW Research Partnership

How has the cost of housing changed over time?

County: Rental rates throughout Santa Barbara County had the sharpest increase in 2021 at 4.2%, the highest growth rate increase of all three counties (i.e., Los Angeles County, San Francisco County, and Santa Barbara County) observed since 2015 (Figure 17). The sharpest decline in rental price for Santa Barbara County was in 2022 at 0.9%. Since the onset of the pandemic, median rent grew from \$2,566.20 to \$3,619.75, a 41% increase.

Figure 17. Average Rent by County and Rent Growth Rate by County, 2016 to 2022



Source: UCSB Economic Forecast

Data Definitions

Average Cost of Rent: Similar to the housing affordability index, the cost of renting apartments is a major component of the cost of living in Santa Barbara County. (UCSB Economic Forecast)

Average Household Income: This is the best measure of income in the context of the standard of living for households because it controls for changes in household size. It measures the ability of families to make necessary and discretionary expenditures on goods and services. (UCSD Economic Forecast)

Employment by Industry: Employment in Santa Barbara County disaggregated by industry. (UCSD Economic Forecast)

Employment Growth by Industry: Employers reporting employment growth over the past three years by industry based on an online survey conducted with employers in Santa Barbara County in the summer of 2022. (BW Research Partnership)

Industry Clusters: Industry clusters are geographic concentrations of businesses that typically share a common market and exchange supporting goods and services. Unlike traditional industry sectors, clusters are comprised of interrelated industries complementing various elements of a supply chain, creating a local ecosystem of businesses. Industry clusters outline local economic drivers, emphasizing job growth and quality. (BW Research Partnership)

Occupational Tiers: Most occupations can be categorized into one of three occupational tiers that provide more insight into job quality. The three-tiered system used in this study is largely defined by current wage data, general educational attainment, and skills requirements. (BW Research Partnership)

Rent Growth: The percentage change in apartment rental rates can be compared against measures of family income to determine if wages are keeping pace with rising rents. (UCSB Economic Forecast)

Total Enrollment Growth: Total enrollment growth is a general indicator of the economic health of a region. Understanding the region's employment trends can help support efforts to effectively grow the economy. (BW Research Partnership)

Data Sources

- American Community Survey (ACS) 5-Year survey data from the US Census Bureau, which is accurate up to 2021 retrieved from U.S. Population: <https://uspopulation.org/california/santa-barbara-county/>
- BW Research Partnership, Santa Barbara City College: School of Extended Learning Economic and Workforce Gap Analysis for Adult Education Students: https://drive.google.com/file/d/1ZqaMmFxBZG4BwpAXFOTEK3IW39DAKT5X/view?usp=drive_link
- California Department of Education DataQuest: <https://dq.cde.ca.gov/dataquest/>
- Department of Transportation, 2021 County-level Economic Forecast for Santa Barbara County, retrieved from: <https://dot.ca.gov/-/media/dot-media/programs/transportation-planning/documents/data-analytics-services/transportation-economics/socioeconomic-forecasts/2021/2021-pdf/santa-barbara-profile-a11y.pdf>
- Employment Development Department (EDD), Employment Projections, retrieved from <https://labormarketinfo.edd.ca.gov/data/employment-projections.html>
- US Bureau of Labor Statistics, Unemployment Rate in Santa Barbara County, CA [CASANT1URN], retrieved from FRED, Federal Reserve Bank of St. Louis: <https://fred.stlouisfed.org/series/CASANT1URN>
- US Census Demographic Profile: https://data.census.gov/profile/Santa_Barbara_County,_California?g=050XX00US06083
- UCSB Economic Forecast Report: <https://book.efp.ucsb.edu/Update/employment.html>

Research and Planning Group for California Community Colleges

The RP Group strengthens the ability of California community colleges to discover and undertake high-quality research, planning, and assessments that improve evidence-based decision-making, institutional effectiveness, and success for all students.

Project Team

Dr. Darla Cooper

Alyssa Nguyen

Michelle White

www.rpgroup.org