



## Small Business Survey

Presented to San Diego Workforce Partnership, Inc.

July 2010



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## EXECUTIVE SUMMARY

### INTRODUCTION TO THE STUDY

The San Diego Workforce Partnership commissioned BW Research Partnership, Inc. (BW Research) to conduct a survey of small businesses within the County. Viewed broadly, the main research objectives of the study were to:

- Evaluate awareness (aided, unaided, informed, and uninformed) and perception of San Diego Workforce Partnership;
- Assess awareness of one-stop career centers in San Diego County;
- Identify methods of recruiting new employees and use of outside agencies for assistance with finding and developing qualified workers;
- Understand small businesses' current workforce challenges; and
- Develop a profile of private-sector small businesses in San Diego County.

### METHODOLOGY OVERVIEW

The methodology for this study focused on small businesses in the private sector with 10 to 100 employees in San Diego County. The survey was administered between March 24 and April 14, 2009 and averaged 15 minutes in length. In total, a statistically representative sample of 806 private-sector county businesses with 10 to 100 employees<sup>1</sup> completed a telephone (796) or web (10) version of the survey, resulting in a maximum margin of error +/- 3.31 percent (at the 95 percent level of confidence) for questions answered by all 806 respondents.

The web version of the survey was made available to firms contacted by telephone that indicated a preference for the web and was also distributed by industry partners (Economic Development Corporations and Chambers of Commerce) to their membership. The survey was not identified as coming from the San Diego Workforce Partnership to maintain an accurate read on the awareness questions. During data processing, the results were checked to ensure that no individual firm completed the survey more than once.

On average, firms surveyed had 27.33 total county employees (median 18.00), and 1.53 county locations (median 1.00). Consistent with the distribution of private-sector small businesses within the County, 45 percent of respondents were located in North County, 34 percent in the Metro quadrant, 13 percent in East County, and eight percent in South County.

Also in line with the universe of private-sector small businesses, 21 percent of respondents were classified as Hospitality and Leisure, 20 percent Professional and

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<sup>1</sup> Firms with up to 150 employees were allowed to participate in the telephone survey as long as they were listed in the database from InfoUSA as having 10 to 100 employees. Web surveys distributed by industry partners also accepted firms with up to 150 employees. In total, 18 of the 806 firms surveyed (2%) had between 101 and 150 total county employees.

Business Services, 12 percent Retail, 11 percent Transportation and Trade, eight percent Healthcare and Education, eight percent Construction, seven percent Finance, Insurance, and Real Estate, seven percent Manufacturing, and four percent Other.

For a more complete assessment of respondents, please refer to the Small Business Profile Section of the report beginning on page 38.

## **KEY FINDINGS AND CONCLUSIONS**

Based on the analysis of the survey data, BW Research is pleased to present the following key findings and conclusions to the San Diego Workforce Partnership.

### **Expected Employment Growth in San Diego's Small Business Community**

In the last 12 months, San Diego County has been mired in the highest unemployment it has faced in over 20 years. And while national economic indicators may not agree on the size or even direction of the economic recovery, the latest small business survey commissioned by the San Diego Workforce Partnership provides strong evidence that small business employers in San Diego County will be active in expanding employment and play a valuable role in San Diego's economic recovery over the next 12 months. This evidence includes:

- Over one-third of small businesses in San Diego County expect to increase overall employment in the next 12 months.
- Less than three percent of small businesses in San Diego expect to decrease overall employment in the next 12 months.
- Small businesses in San Diego County overall, expect to increase employment by 8.3% or increase total employment by almost 18,000 jobs across the County.
- Small business employers in healthcare and education (10%) and professional services (9%) expect to increase overall employment by over nine percent in the next 12 months.
- Temporary employment, often cited as an early indicator in expected increases in regional employment, is expected to increase by just over 30 percent in the next 12 months in San Diego's small business community.

These results provide a comprehensive assessment of expected employment growth in San Diego's small business community and reflect relatively consistent employment growth expectations across multiple industries and within each of San Diego's geographic quadrants (north, south, east, and metropolitan sub-regions).

### **San Diego's Workforce Development Challenges and Opportunities**

While the results of the small business survey provide strong evidence for optimism in the County's employment projections, they also reveal important feedback on the region's workforce development system and the overall workforce needs of San Diego's small business community.

In a time with historically high unemployment and a slack labor market, some employers are still facing difficulty finding qualified workers to help grow their businesses. Overall, 43 percent of small business employers indicated at least some difficulty recruiting non-entry level employees with adequate skills and industry experience. Difficulty recruiting employees was even more pronounced among the following types of small business employers:

- Over half of employers in East County indicated at least some difficulty recruiting non-entry level employees.
- Over half of employers with less than 10 employees at their current location indicated at least some difficulty recruiting non-entry level employees.
- Almost half of employers in construction (49%) and healthcare (46%) indicated at least some difficulty recruiting entry-level employees with appropriate training and education.

Small business employers also indicated that recent hires tend to have the most trouble with interpersonal communication skills (34%), creative problem-solving skills (32%), the ability to work independently (29%), technical writing skills (26%), and technical competence specific to the position (26%).

These findings reveal that while small business employers are not facing any overwhelming workforce challenges in the current economic environment, as the employment picture improves they will face more significant workforce challenges finding a qualified workforce as the labor market tightens.

### **Perceptions of the San Diego Workforce Partnership**

Overall awareness of the San Diego Workforce Partnership in the small business community is mixed, with just over one in five small businesses having heard of the Workforce Partnership, but less than one percent of small businesses naming San Diego Workforce Partnership as an organization that provides employer services and just over three percent of small business employers have had some interaction with the Partnership.

- Small business employers in San Diego's southern sub-region (26%) were the most likely to have heard of the San Diego Workforce Partnership and not coincidentally were the most likely to have interacted (5%) with the Partnership.
- From an industry perspective, small business employers in professional and business services (27%), construction (25%), and transportation and trade (25%) were the most likely to have heard of, and interacted with, the Partnership.
- Employers in Manufacturing (13%), Finance, Insurance and Real Estate (17%), and Hospitality and Leisure (17%) were the industries least likely to have heard of or interacted with the Partnership.

While overall awareness of the Workforce Partnership was mixed, overall favorability towards the Partnership was considerably more positive. Among small business aware of the San Diego Workforce Partnership (22% aided awareness), approximately half

offered an opinion - but of those that did, almost all indicated either somewhat favorable (38%) or very favorable (10%). More importantly, the more established the relationship with the Workforce Partnership, the higher the percentage of employers that indicated a very favorable perception of the Partnership. Twenty-three percent of firms that had interacted with the Workforce Partnership had a very favorable opinion of the Partnership whereas those employers that could not identify any of the services provided by the Partnership (uninformed awareness of the Partnership) only had six percent of employers provide a very favorable opinion.

These findings indicate that when the Partnership has had an opportunity to interact with employers they have generally left a favorable impression upon employers. The findings also support the idea of developing strategies that increase interaction with the employer community to increase their support among San Diego's employers.

### **Small Business Employment Development Profile**

In general, small businesses in San Diego were not aware of the organizations that provide employment services and seldom used outside agencies to provide these services. Approximately two out of every three small businesses surveyed could not or would not name an organization that provides employer services. The relatively low awareness of the organizations that provide employer services was consistent with small businesses' relatively low usage of outside agencies to provide those services. Less than 30 percent of small businesses used an outside agency for temporary hiring and that was considerably higher than the other employment services that were examined including pre-screening applicants (18%), recruiting applicants (14%), or job training (13%). Temporary hiring was the one employment service that over a quarter of small businesses had used an outside agency and most (71%) had worked with an outside private agency like Manpower.

For additional detail on the findings and a complete assessment of the survey results, please proceed to the body of the report beginning on the next page.

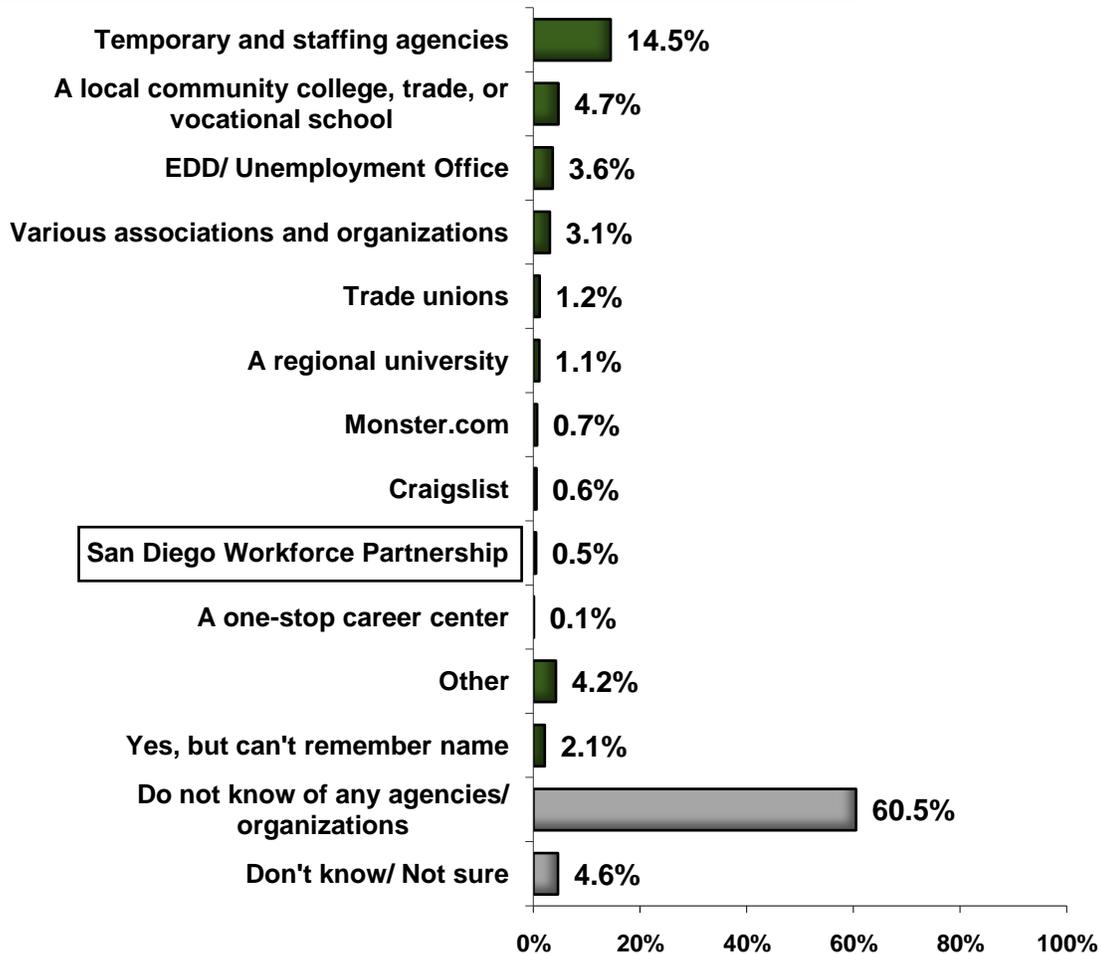
## ORGANIZATIONS THAT PROVIDE EMPLOYER SERVICES

The first substantive question of the survey asked businesses if they knew the name of any agencies or organizations in the County that could assist their firm in finding qualified workers or training and developing their current employees. Asked in an open-ended format, employers were not constrained to choose their response from a list. As such, responses represent top of mind, unaided awareness of organizations that provide these employer services.

Sixty-one percent of respondents did not know the name of any agencies or organizations in the County that could assist their firm in finding qualified workers or training and developing their current employees and an additional five percent did not know or were not sure.

Temporary and staffing agencies were identified the most frequently at 15 percent, with Apple One (3%) and Labor Ready (2%) receiving the most individual responses. The total percentage of unaided awareness for San Diego Workforce Partnership (0.5%) or a one-stop career center (0.1%) at this question was one percent.

**Figure 1 Unaided Awareness of Organizations that Provide Employer Services**



Throughout this report, analyses of small business sub-groups will be presented in text boxes. To follow is an examination of **unaided awareness of agencies or organizations in the County that assist businesses in finding qualified workers or training and developing their current employees** by the many demographic sub-groups examined in the study.

The sub-groups of respondents bulleted below were more likely than their sub-group counterparts to identify San Diego Workforce Partnership as an agency or organization that could assist in finding qualified workers or training and developing current workers.

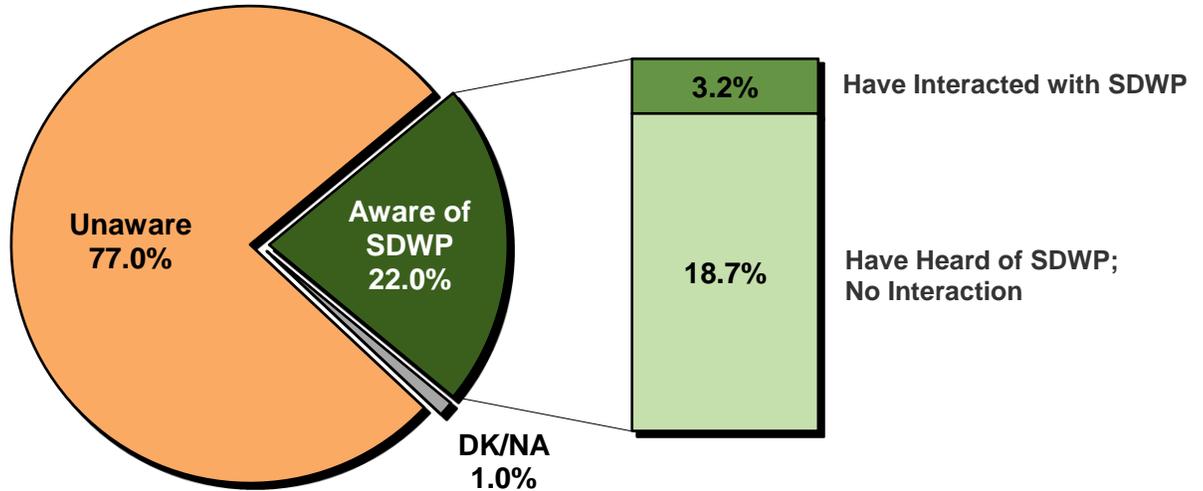
However, it should be noted that the total number of firms that identified San Diego Workforce Partnership was less than one percent and was therefore a very small universe to analyze.

- Respondents from the Professional and Business Services industry were more likely (2%) than respondents from other industries to identify San Diego Workforce Partnership as an organization to assist in recruiting and developing a qualified workforce.
- Respondents in Northern San Diego County were more likely (1%) than respondents from other parts of the County to identify San Diego Workforce Partnership as an organization to assist in workforce development.

## SAN DIEGO WORKFORCE PARTNERSHIP AIDED AWARENESS

When asked directly, 22 percent of small businesses surveyed had heard, read, or seen something about the San Diego Workforce Partnership. Three percent had interacted with the San Diego Workforce Partnership and 19 percent had heard about it but had not interacted with the San Diego Workforce Partnership.

Figure 2 Overall SDWP Awareness



Below is an analysis of San Diego Workforce Partnership aided awareness among the sub-groups examined in the study.

- From a geographic perspective within the County, awareness with San Diego Workforce Partnership can be ranked in the following order:
  - South, 25.8% (interaction: 5%)
  - North, 22.5% (interaction: 4%)
  - Metro, 20.7% (interaction: 2%)
  - East, 19.8% (interaction: 3%).
- From an industry view, awareness with SDWP was more likely to occur in:
  - Professional and Business Services, 27% (interaction: 5%)
  - Construction, 25% (interaction: 5%)
  - Transportation and Trade, 25% (interaction: 5%).

While the industries least likely to be aware of SDWP included:

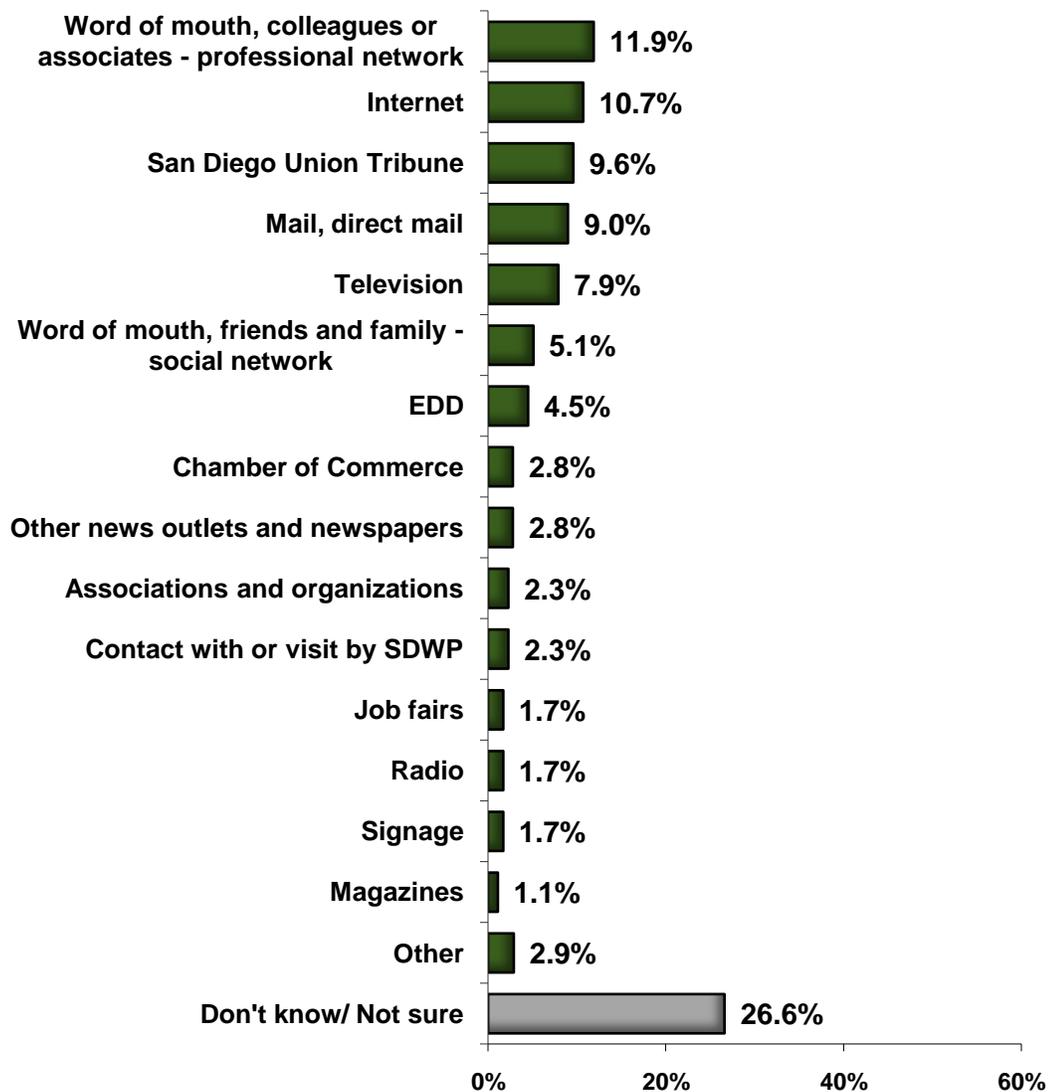
- Manufacturing, 13% (interaction: 2%)
  - Finance, Insurance, and Real Estate, 17% (interaction: 0%)
  - Hospitality and Leisure, 17% (interaction: 3%).
- From an employer size perspective - either looking at annual revenue, the total employees at a location, or the total number of employees in San Diego - **larger firms in our sample were more likely to have interacted with San Diego Workforce Partnership**. It is worth noting that larger firms, in terms of annual revenue (\$10 million plus) were no more aware of San Diego Workforce Partnership than those firms with less annual revenue.

**SAN DIEGO WORKFORCE PARTNERSHIP AWARENESS RECALL:  
SOURCES OF INFORMATION**

Businesses that were aware of the San Diego Workforce Partnership (either with or without interaction) were next asked, in an open-ended format, to detail where they had heard, read, or seen the information about the organization.

Out of the 177 businesses who reported awareness of the Workforce Partnership, 12 percent recalled hearing about the organization through word of mouth in their professional network, 11 percent saw the information online, and 10 percent read about it in the San Diego Union Tribune. Twenty-seven percent of respondents aware of San Diego Workforce Partnership could not recall where they heard about the organization.

**Figure 3 SDWP Awareness Recall: Sources of Information<sup>2</sup>**



<sup>2</sup> Since respondents were free to mention multiple responses, the percentages will total more than 100%.

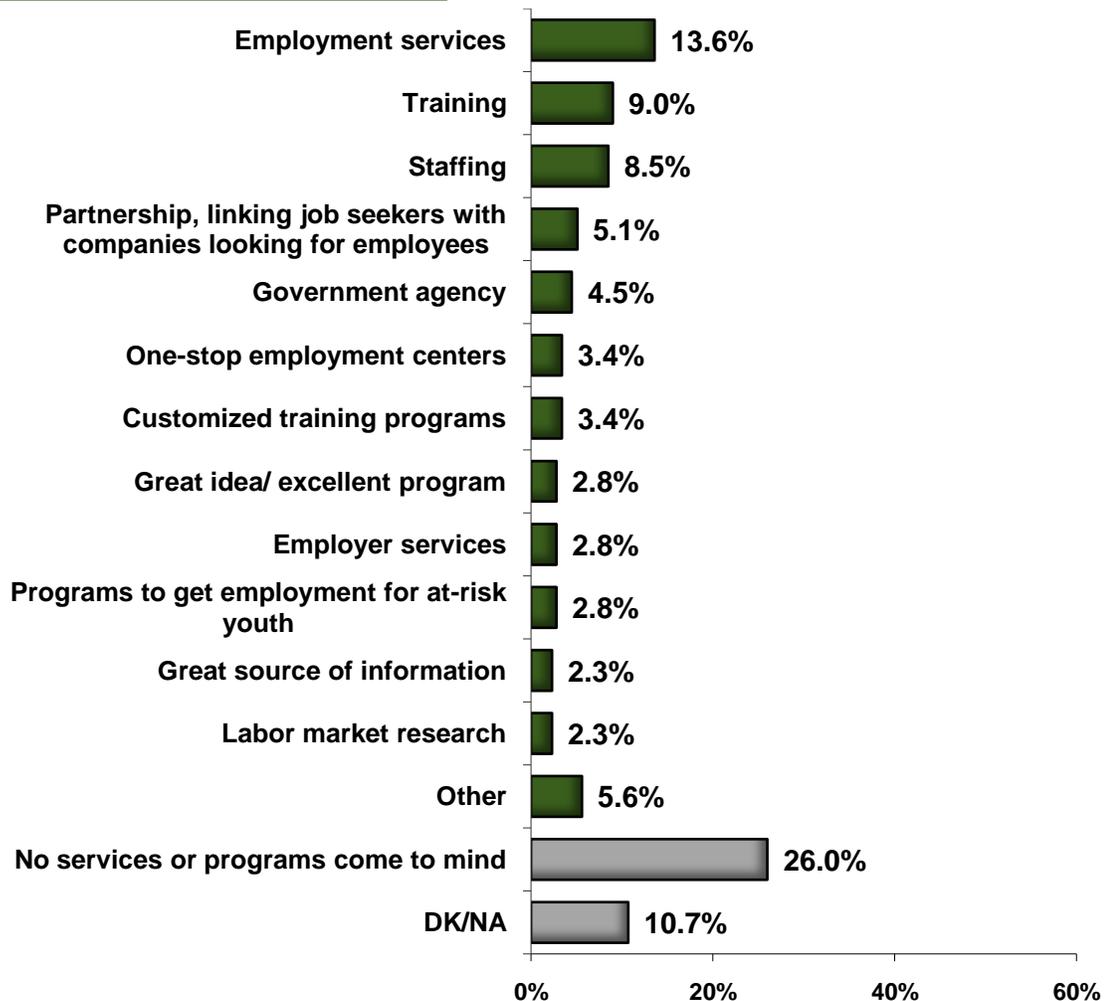
**TOP OF MIND RECALL: SAN DIEGO WORKFORCE PARTNERSHIP**

Small businesses aware of San Diego Workforce Partnership were also asked, in an open-ended format, to reveal what first came to mind when they thought about the organization. Fourteen percent indicated “Employment services,” nine percent mentioned “Training,” and nine percent staffing.

Among respondents aware of San Diego Workforce Partnership, 63 percent had informed awareness, in that they could accurately name a service or had a comment about the organization. The remaining nine percent could not recall any specific services (no services or programs came to mind or they did not know or declined to state).

*Overall, 14 percent of small businesses had informed awareness of San Diego Workforce Partnership, eight percent had uninformed awareness, and 78 percent had no awareness (includes one percent that were unsure).*

**Figure 4 Awareness Recall: SDWP Services<sup>3</sup>**



<sup>3</sup> Since respondents were free to mention multiple responses, the percentages will total more than 100%.

## SAN DIEGO WORKFORCE PARTNERSHIP FAVORABILITY RATING

Small businesses that indicated awareness of San Diego Workforce Partnership were next asked whether they have an overall favorable or unfavorable opinion about the organization.

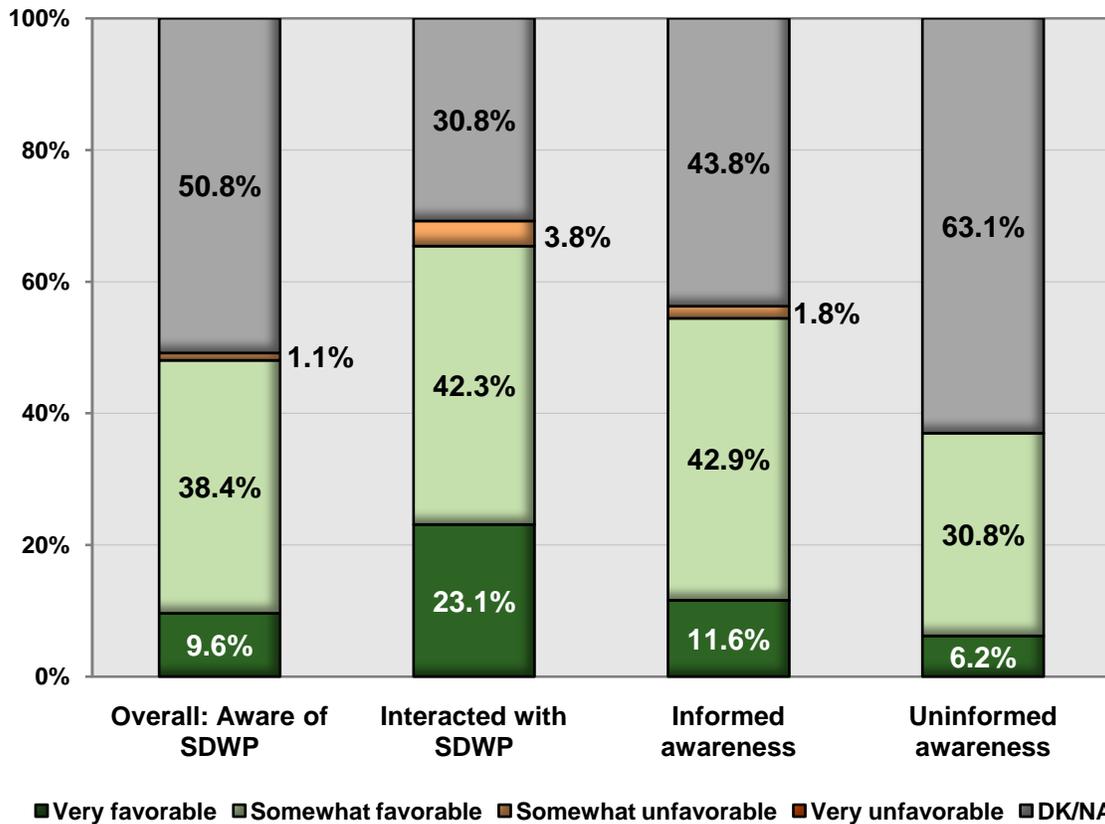
Overall, 48 percent of the firms aware of San Diego Workforce Partnership viewed it favorably; with 10 percent reporting they have a “Very favorable” opinion and 38 percent indicating they have a “Somewhat favorable” opinion. Only one percent indicated an unfavorable opinion and 51 percent indicated that they did not know or declined to state.

*The favorability rating increases to 98 percent when those respondents who declined to state or did not recall enough about San Diego Workforce Partnership to comment are factored out.*

The figure below also shows favorability among awareness sub-groups – specifically, among those who have interacted with San Diego Workforce Partnership and those with informed and uninformed awareness of the organization.

Interestingly, the percentage of respondents who declined to state or did not feel they knew enough to provide a rating was high among all groups – even those that had interacted with San Diego Workforce Partnership.

**Figure 5 Favorability Rating Among those Aware of SDWP**



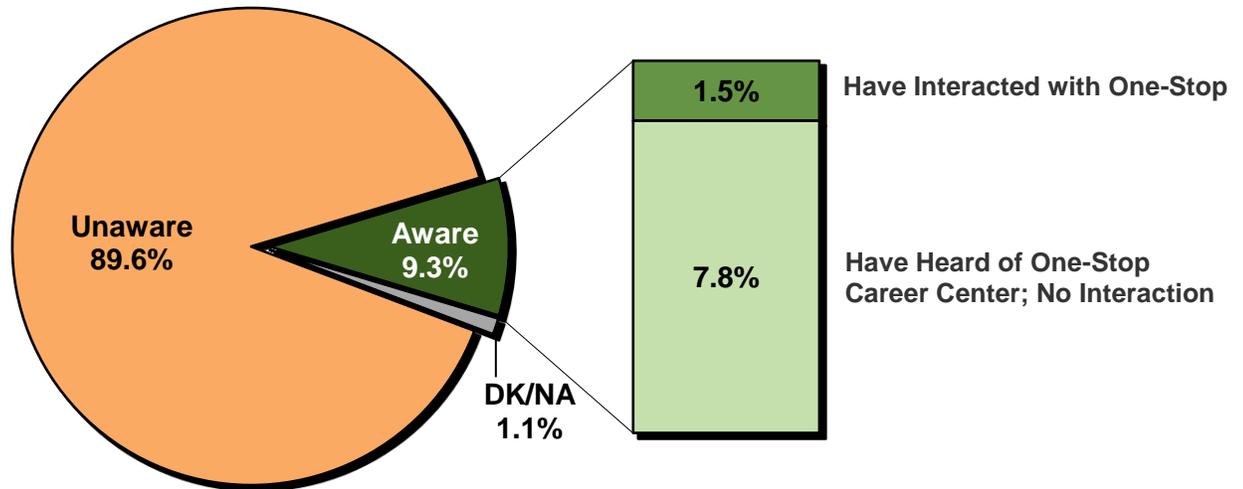
Below is an analysis of the different sub-groups examined in the study that provided their input on the perceived favorability of SDWP (all percentages are among those aware of San Diego Workforce Partnership).

- Respondents from the North (12%) and South (12%) quadrants of the County were more likely than respondents from other areas of the County to indicate they had a **very** favorable opinion of the San Diego Workforce Partnership. Overall favorability (very favorable + somewhat favorable) was highest in East County (57%) followed by North County (49%), South County (47%), and lastly the Metro (41%) quadrant within the County. It is worth noting that only one percent of those firms that responded to this question gave a somewhat unfavorable response and no respondents indicated very unfavorable.
- The industries below were the most likely to provide a very favorable rating:
  - Professional and Business Services; 16% very favorable
  - Transportation and Trade; 14% very favorable
  - Healthcare and Education; 13% very favorable
  - Construction; 12% very favorable.
- Employers that had hired a temporary employee in the last 12 months had a higher overall favorability rating (56% vs. 44%) but a lower very favorable rating (4% vs. 12%).
- Employers expecting to have more permanent and/or temporary employees in the next 12 months indicated higher favorability towards San Diego Workforce Partnership than those firms that were expecting to have less permanent and/or temporary employees in the next 12 months.

## ONE-STOP CAREER CENTER AIDED AWARENESS

Nine percent of small businesses surveyed had heard, read, or seen something about a one-stop career center in San Diego County. Two percent had interacted with a one-stop career center in the County and eight percent had heard about one but had not interacted with a one-stop career center in San Diego County.

**Figure 6 One-Stop Career Center Awareness**



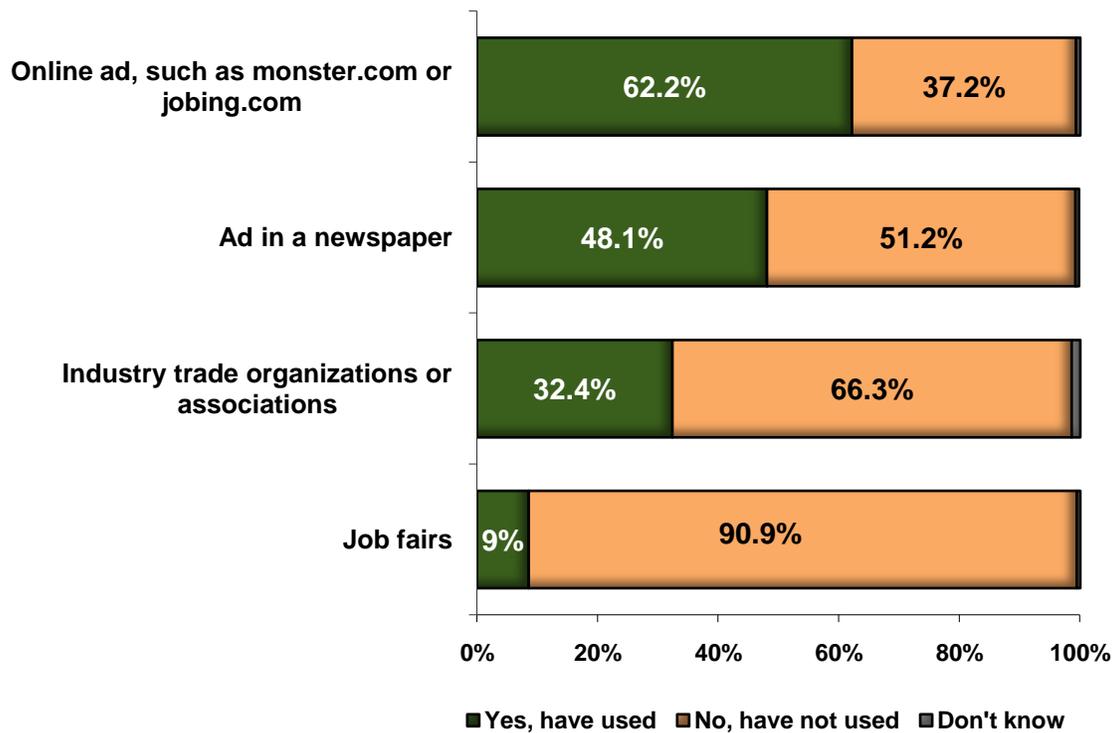
Below is an analysis of one-stop career center aided awareness among the sub-groups examined in the study.

- Respondents from the South County were more likely to have interacted (3%) or have heard of a one-stop career center (14%) than respondents from other areas in the County.
- Employers with 100 to 150 employees in San Diego County were more likely to have interacted with (11%), or heard of (11%), of a one-stop career center.
- As expected, firms that have interacted with or heard of the San Diego Workforce Partnership were more likely to have interacted with or worked with a one-stop career center. It is still worth noting, that 69% of firms that have interacted with San Diego Workforce Partnership have not heard of a one-stop career center.

## USE OF METHODS TO RECRUIT QUALIFIED APPLICANTS

Respondents were next asked about their firm’s hiring practices as they relate to recruiting qualified applicants. Six out of 10 small businesses (62%) have used an online ad, such as monster.com or jobing.com to recruit qualified applicants. Fort-eight percent have placed an ad in a newspaper for recruitment, 32 percent have utilized an industry trade organization or association, and nine percent have utilized job fairs to recruit qualified applicants.

**Figure 7 Use of Methods to Recruit Qualified Applicants**



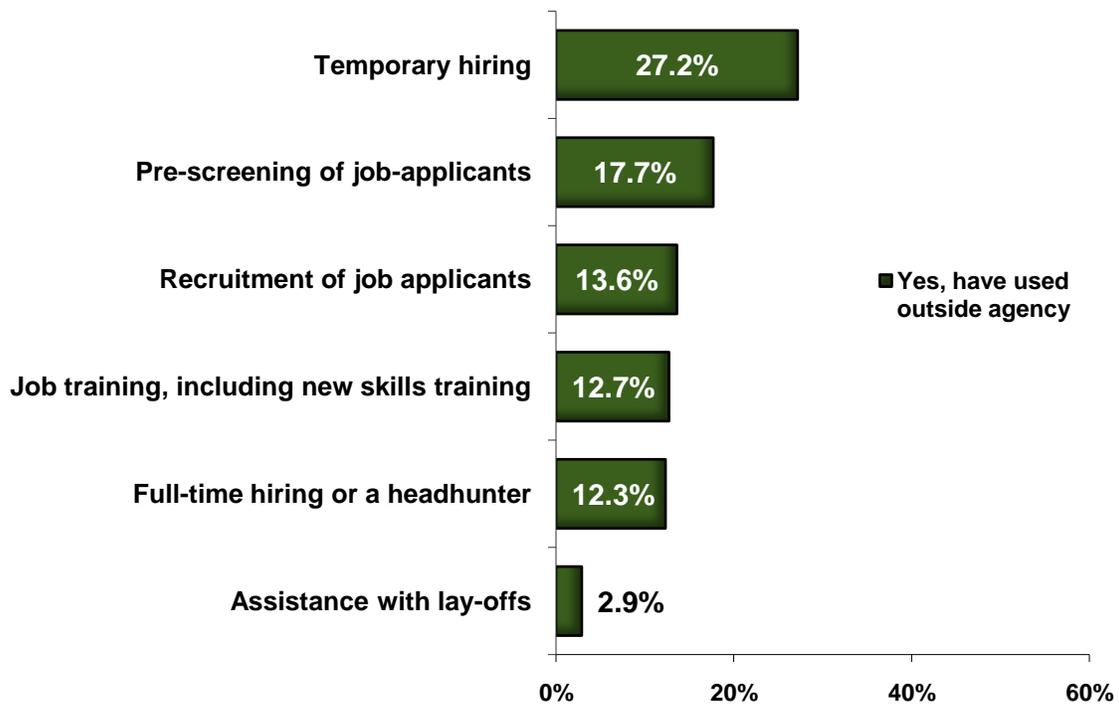
To follow is an analysis of employers' use of recruitment methods to find qualified applicants.

- Respondents from North County were more likely (71%) to use online ads to recruit new employees than respondents from other areas (55%) in the County.
- Employers from Finance, Insurance, and Real Estate (77%), Healthcare and Education (72%), and Professional and Business Services (72%) were more likely to recruit new employees through online ads than employers from other industries.
- Firms with more employees, either in terms of the total employees in San Diego County or at a given location were more likely to use online ads to recruit new employees compared to their smaller counterparts.
- Healthcare and Education employers were more likely (19%) to use job fairs to recruit new employees than any of the comparable industries.
- Professional and Business Services employers were more likely (49%) to use industry trade organizations or associations to recruit new employees than employers from any of the comparable industries.

## USE OF OUTSIDE AGENCY OR ORGANIZATION FOR SERVICES

Small businesses were next asked whether their firm has used an outside agency or organization for a number of services. Approximately one in four (27%) firms utilized an outside agency for temporary hiring, 18 percent used outside help for pre-screening job applicants, 14 percent for recruitment of job applicants, 13 percent for job training (including new skills training), 12 percent utilized an outside agency for full-time hiring or headhunting services, and three percent for assistance with lay-offs.

Figure 8 Use of Outside Agency or Organization for Services



The sub-groups below were much more likely than their counterparts to have utilized an outside agency or organization for at least one of the services.

- Employers from Finance, Insurance, and Real Estate (47%), Manufacturing (43%), and Construction (42%) were more likely than employers from other industries to use an outside agency to assist with temporary hiring.
- Respondents from South County were more likely (29%) to use an outside agency to assist in pre-screening job-applicants than firms from other areas within the County.
- Firms with \$10 million or more in annual revenue were more likely (28%) to use an outside agency to assist in pre-screening job-applicants than their counterparts with less annual revenue.
- Employers from Construction (19%) and Professional and Business Services (18%) were more likely to use an outside agency to assist with job training, including new skills training than employers from other industries.
- Firms with a relatively small (6 to 24 percent) percentage of employees with less than a 4-year degree were more likely (26%) to use an outside agency to assist with job training and new skills training than those firms with more or less employees with less than a four-year degree.
- Employers from Finance, Insurance, and Real Estate (22%) and Manufacturing (20%) were more likely to use an outside agency to assist with full-time hiring or the use of a headhunter than employers from other industries.
- Firms with 50 or more employees at a given location were more likely (22%) to use an outside agency to assist with full-time hiring or the use of a headhunter than employers with less than 50 employees at a given location.

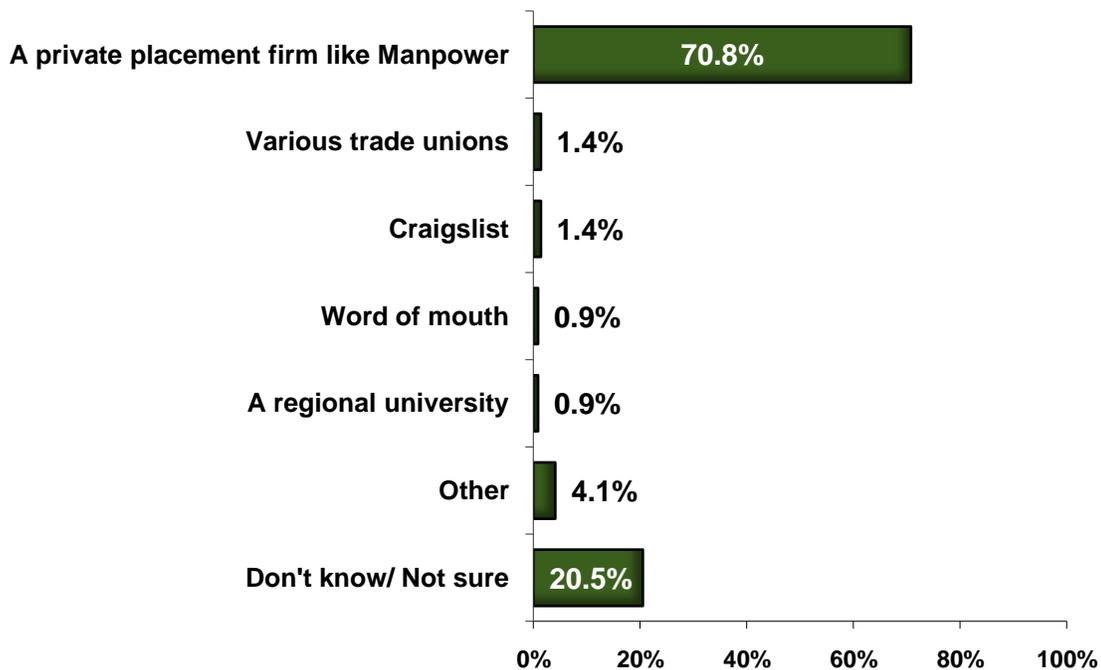
## USE OF OUTSIDE AGENCY FOR TEMPORARY HIRING

Twenty-seven percent of small businesses (219 of 806 respondents) have used an outside agency for temporary hiring.

Among those, private placement firms were the most utilized service provider at 71 percent. Individual providers within this category included Apple One (8%), Labor Ready (5%), Manpower (3%), Express (3%), Aerotek (2%), GoStaff (2%), Labor Finders (2%), Volt (2%), TriStaff (2%), and Robert Half (2%).

Twenty-one percent of firms that had used an outside agency for temporary hiring declined to state or could not recall the name of the firm.

**Figure 9 Service Provider for Temporary Hiring (n=219)<sup>4</sup>**



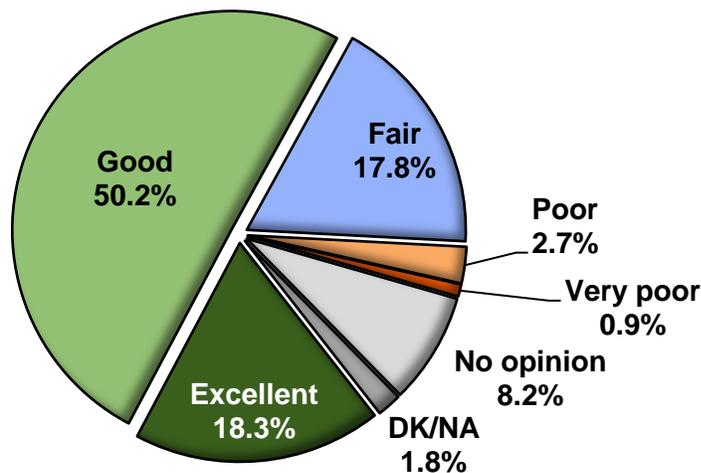
<sup>4</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for temporary hiring were next asked to rate their provider. Sixty-nine percent provided a positive rating of either “Excellent” (18%) or “Good” (50%), 18 percent provided a neutral rating of “Fair,” four percent a negative rating, and 10 percent either had “No opinion” (8%) or did not know or declined to state (2%).

Among the sub-groups of service providers used for temporary hiring, private placement firms was the only sub-group with a large enough sample size for a separate analysis (aside from the group that could not recall the name of their provider).

Private placement firms received a 76 percent positive rating (23% Excellent and 53% Good), 18 percent “Fair,” three percent negative, and three percent of respondents that had used private placement firms for this service did not have an opinion, did not know, or declined to state.

**Figure 10 Service Provider Rating: Temporary Hiring (n=219)**



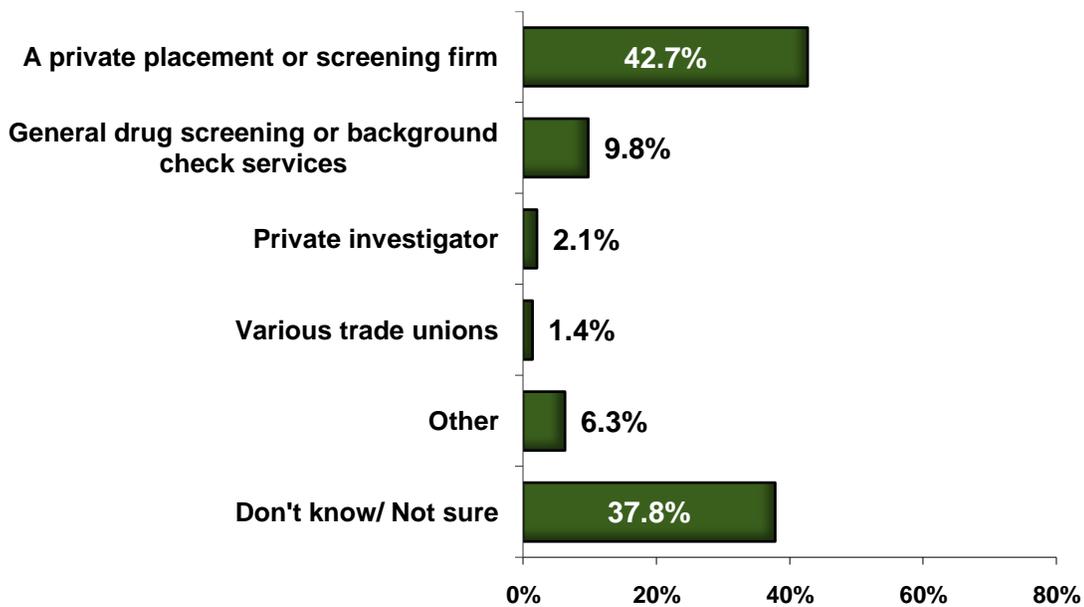
## USE OF OUTSIDE AGENCY FOR PRE-SCREENING JOB APPLICANTS

Eighteen percent of small businesses (143 of 806 respondents) have used an outside agency for pre-screening job applicants.

Among those, private placement or screening firms were the most utilized service provider at 43 percent. Individual providers within this category included ADP (8%), Apple One (3%), Robert Half (2%), and Account Temps (2%).

Thirty-eight percent of firms that had used an outside agency for pre-screening job applicants declined to state or could not recall the name of the firm.

**Figure 11 Service Provider for Pre-Screening Job Applicants (n=143)<sup>5</sup>**



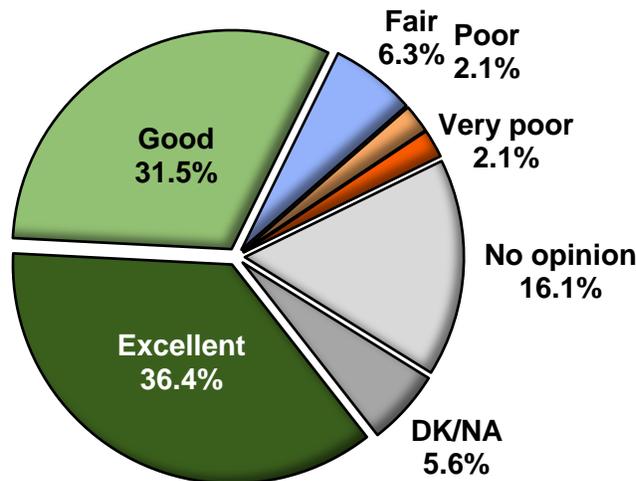
<sup>5</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for pre-screening job applicants were next asked to rate their provider. Sixty-eight percent provided a positive rating of either “Excellent” (36%) or “Good” (32%), six percent provided a neutral rating of “Fair,” four percent a negative rating, and 22 percent either had “No opinion” (16%) or did not know or declined to state (6%).

Among the sub-groups of service providers used for pre-screening job applicants, private placement or screening firms was the only sub-group with a large enough sample size for a separate analysis (aside from the group that could not recall the name of their provider).

Private placement and screening firms received a 79 percent positive rating (43% Excellent and 36% Good), seven percent “Fair,” five percent negative, and 10 percent of respondents that had used private placement firms for this service did not have an opinion, did not know, or declined to state.

**Figure 12 Service Provider Rating: Pre-Screening Job Applicants (n=143)**



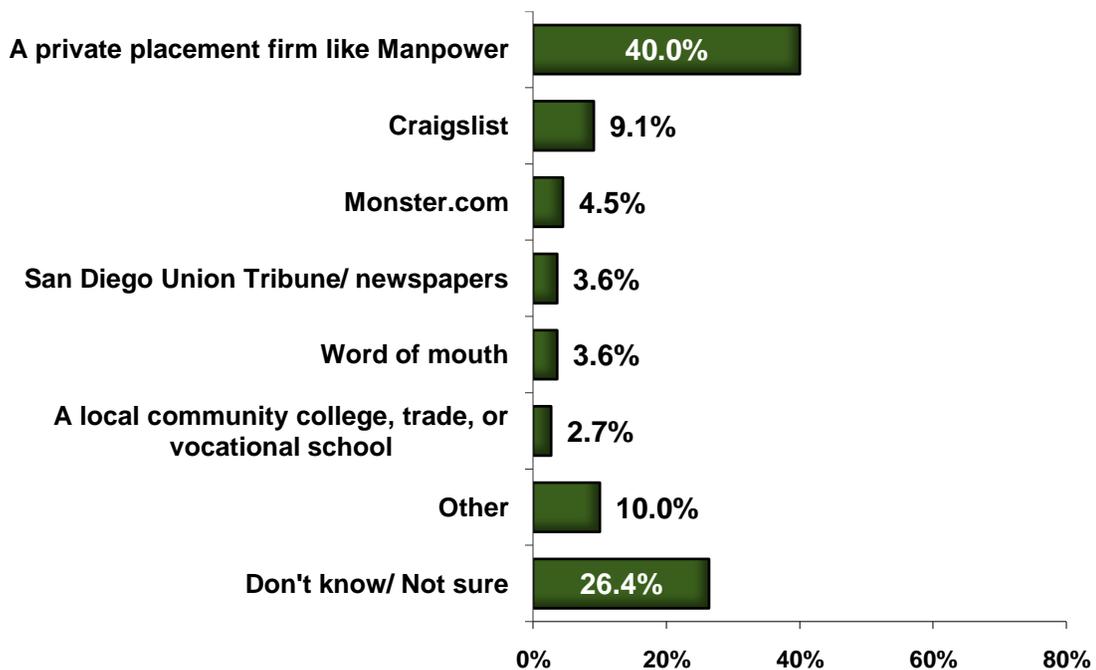
## USE OF OUTSIDE AGENCY FOR RECRUITMENT OF JOB APPLICANTS

Fourteen percent of small businesses (110 of 806 respondents) have used an outside agency for recruitment of job applicants.

Among those, private placement firms were the most utilized service provider at 40 percent. Individual providers within this category included Robert Half (6%), Apple One (5%), Davidson (2%), and Account Temps (2%).

Twenty-six percent of firms that had used an outside agency for recruitment of job applicants declined to state or could not recall the name of the firm.

**Figure 13 Service Provider for Recruitment of Job Applicants (n=110)<sup>6</sup>**



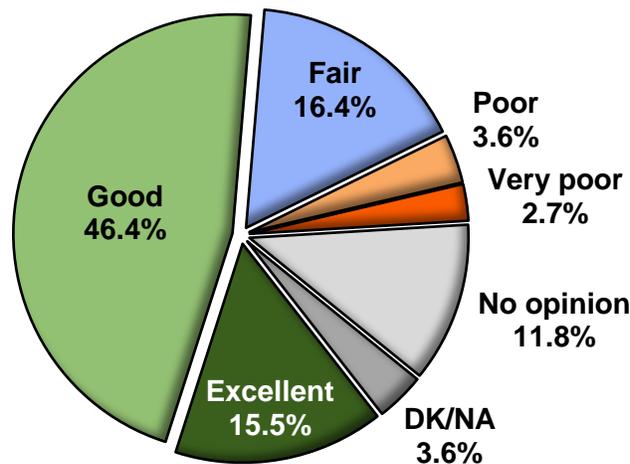
<sup>6</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for recruitment of job applicants were next asked to rate their provider. Sixty-two percent provided a positive rating of either “Excellent” (16%) or “Good” (46%), 16 percent provided a neutral rating of “Fair,” six percent a negative rating, and 15 percent either had “No opinion” (12%) or did not know or declined to state (4%).

Among the sub-groups of service providers used for recruitment of job applicants, private placement firms was the only sub-group with a large enough sample size for a separate analysis (aside from the group that could not recall the name of their provider).

Private placement firms received a 77 percent positive rating (23% Excellent and 55% Good), 11 percent “Fair,” seven percent negative, and five percent of respondents that had used private placement firms for this service did not have an opinion, did not know, or declined to state.

**Figure 14 Service Provider Rating: Recruitment of Job Applicants (n=110)**



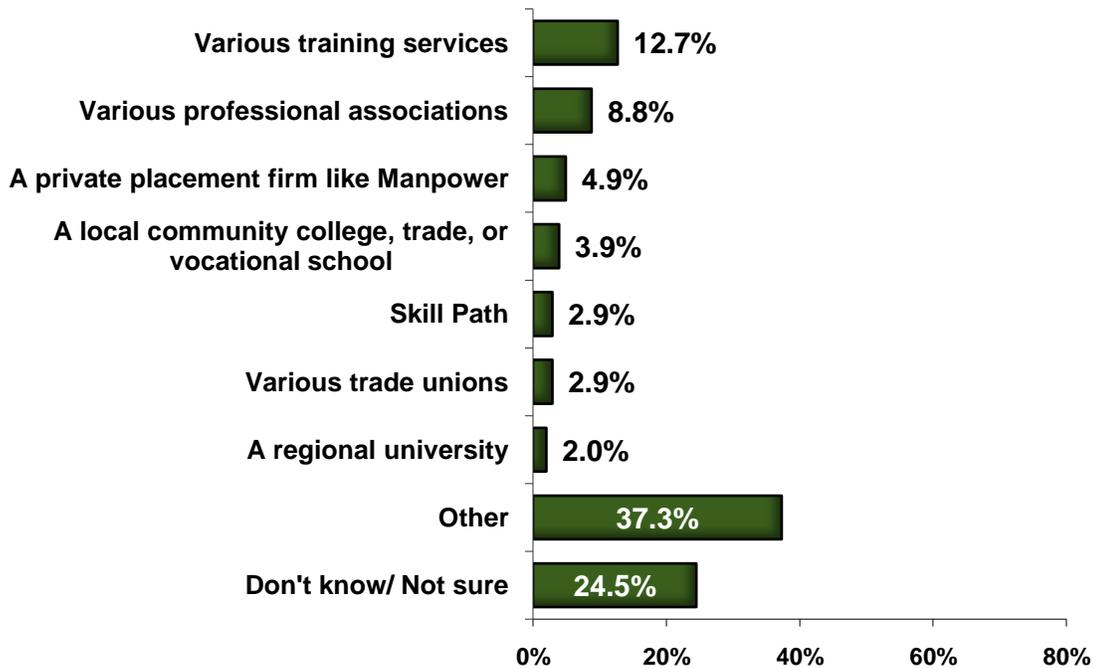
## USE OF OUTSIDE AGENCY FOR JOB TRAINING

Thirteen percent of small businesses (102 of 806 respondents) have used an outside agency for job training, including new skills training.

Among those, the provider was varied, with 37 percent providing either a general response (e.g., various consultants) or a single response (cited by only one respondent).

Twenty-five percent of firms that had used an outside agency for job training, including new skills training declined to state or could not recall the name of the firm.

**Figure 15 Service Provider for Job Training, Including New Skills Training (n=102)<sup>7</sup>**



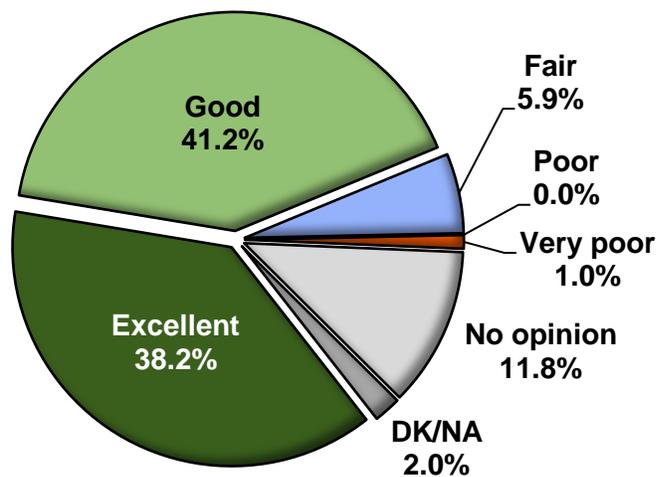
<sup>7</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for job training (including new skills training) were next asked to rate their provider. Seventy-nine percent provided a positive rating of either “Excellent” (38%) or “Good” (41%), six percent provided a neutral rating of “Fair,” one percent a negative rating, and 14 percent either had “No opinion” (12%) or did not know or declined to state (2%).

Among the sub-groups of service providers used for job training (including new skills training), the other category was the only sub-group with a large enough sample size for a separate analysis (aside from the group that could not recall the name of their provider).

Respondents who had used a service provider other than those listed in Figure 15 provided a 87 percent positive rating (51% Excellent and 35% Good), five percent “Fair,” zero percent negative, and eight percent of respondents that had used an “Other” firm for this service did not have an opinion, did not know, or declined to state.

**Figure 16 Service Provider Rating: Job Training, Including New Skills Training (n=102)**



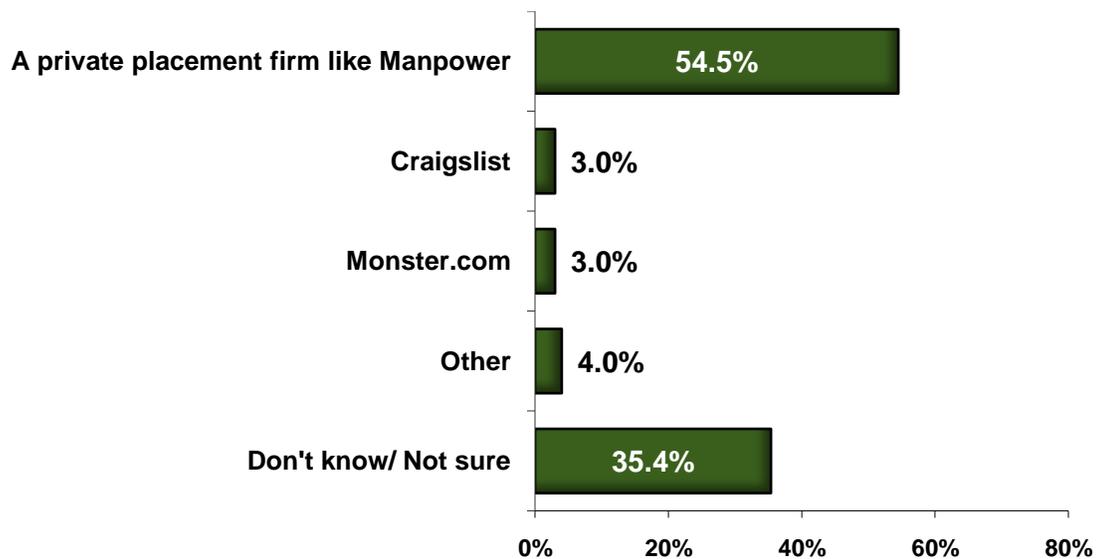
## USE OF OUTSIDE AGENCY FOR FULL-TIME HIRING OR A HEADHUNTER

Twelve percent of small businesses (99 of 806 respondents) have used an outside agency for full-time hiring or headhunting services.

Among those, private placement firms were the most utilized service provider at 55 percent. Individual providers within this category included Robert Half (8%), Apple One (8%), TriStaff (2%), and Legend (2%).

Thirty-five percent of firms that had used an outside agency for job training, including new skills training declined to state or could not recall the name of the firm.

**Figure 17 Service Provider for Full-Time Hiring or a Headhunter (n=99)<sup>8</sup>**



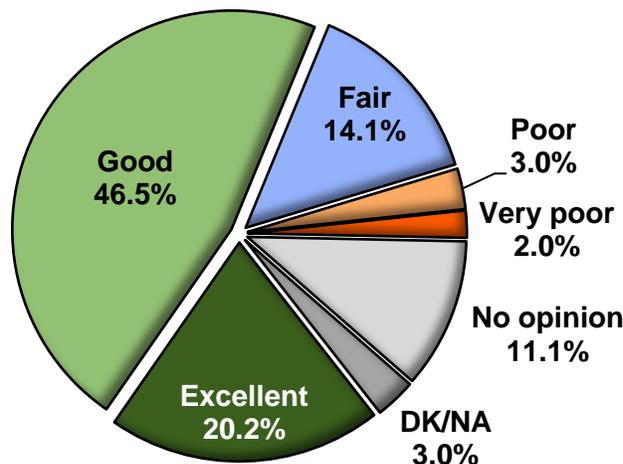
<sup>8</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for full-time hiring or headhunting services were next asked to rate their provider. Sixty-seven percent provided a positive rating of either “Excellent” (20%) or “Good” (47%), 14 percent provided a neutral rating of “Fair,” five percent a negative rating, and 14 percent either had “No opinion” (11%) or did not know or declined to state (4%).

Among the sub-groups of service providers used for full-time hiring or headhunting services, private placement firms was the only sub-group with a large enough sample size for a separate analysis (aside from the group that could not recall the name of their provider).

Private placement firms received a 83 percent positive rating (32% Excellent and 52% Good), nine percent “Fair,” four percent negative, and four percent of respondents that had used private placement firms for this service did not have an opinion, did not know, or declined to state.

**Figure 18 Service Provider Rating: Full-Time Hiring or a Headhunter (n=99)**



## USE OF OUTSIDE AGENCY FOR ASSISTANCE WITH LAY-OFFS

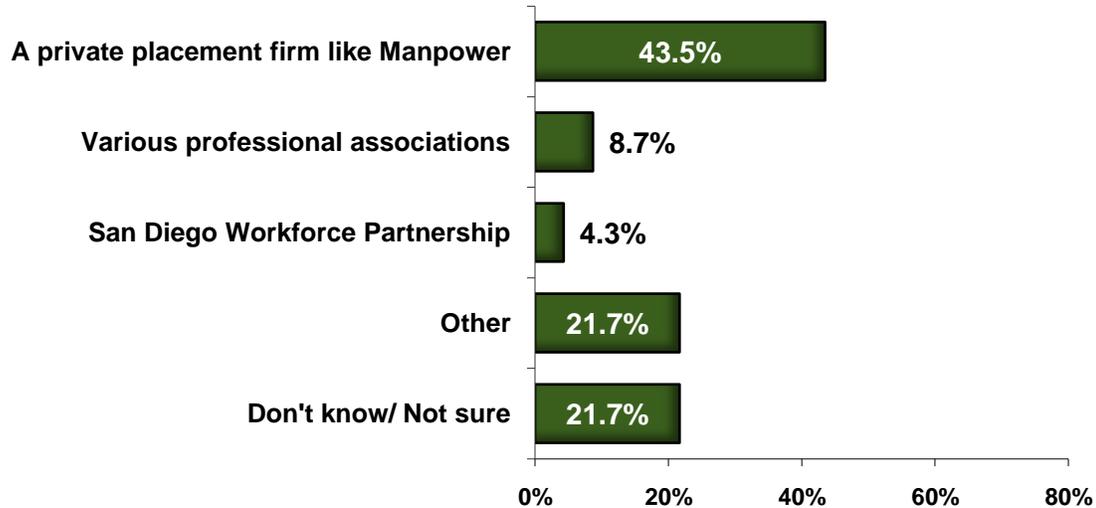
Three percent of small businesses (23 of 806 respondents) have used an outside agency for assistance with lay-offs.

Among those, private placement firms were the most utilized service provider at 44 percent. Individual providers within this category included ADP (13%) and various payroll companies (13%).

San Diego Workforce Partnership was a provider utilized by one respondent for assistance with lay-offs (4%).

Twenty-two percent of firms that had used an outside agency for assistance with lay-offs declined to state or could not recall the name of the firm.

**Figure 19 Service Provider for Assistance with Lay-Offs (n=23)<sup>9</sup>**

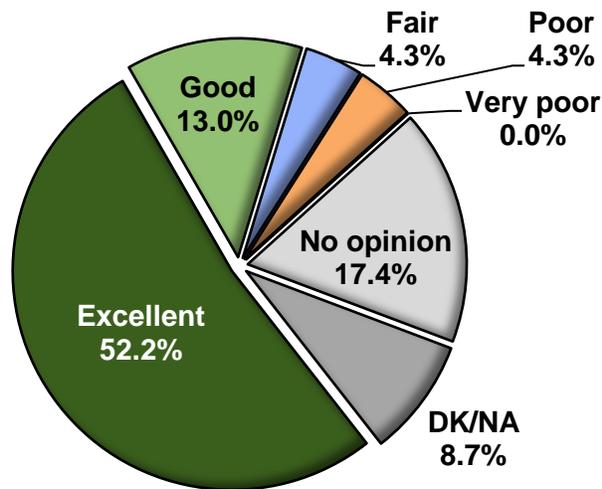


<sup>9</sup> Please refer to Appendix A for a more complete breakdown of responses. General responses (e.g., “various consultants”) and those cited by just one respondent were combined into the other category.

Firms that have used an outside service provider for assistance with lay-offs were next asked to rate their provider. Sixty-five percent provided a positive rating of either “Excellent” (52%) or “Good” (13%), four percent provided a neutral rating of “Fair,” four percent a negative rating, and 26 percent either had “No opinion” (17%) or did not know or declined to state (9%).

With a base sample size of 23 respondents, none of the sub-groups of service providers used for assistance with lay-offs had a large enough sample size for a separate analysis.

**Figure 20 Service Provider Rating: Assistance with Lay-Offs (n=23)**

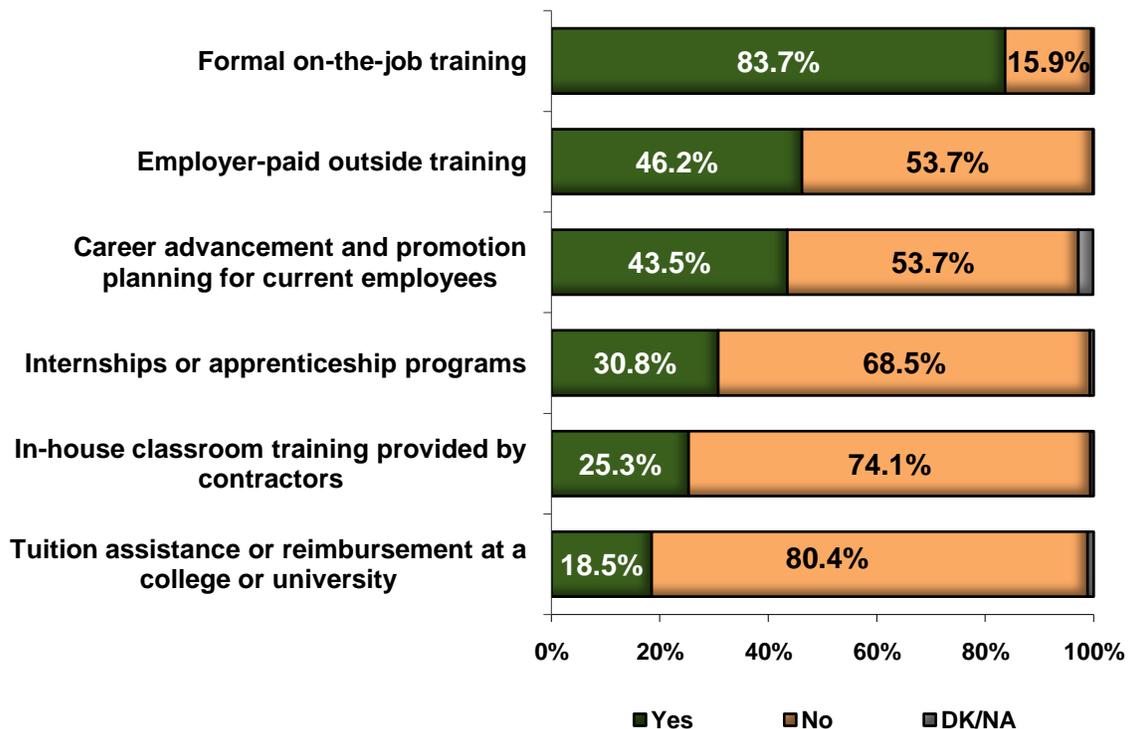


## EMPLOYEE DEVELOPMENT PRACTICES

Eighty-four percent of small businesses surveyed provided “Formal on-the-job training” to their employees. Forty-six percent offered “Employer-paid outside training” and 44 percent “Career advancement and promotion planning for current employees.”

Less than one in three offered “Internships or apprenticeship programs” (31%), “In-house classroom training provided by contractors” (25%), and “Tuition assistance or reimbursement at a college or university” (19%).

**Figure 21 Employee Development Practices**



To follow is an analysis of employers' use of employee development practices.

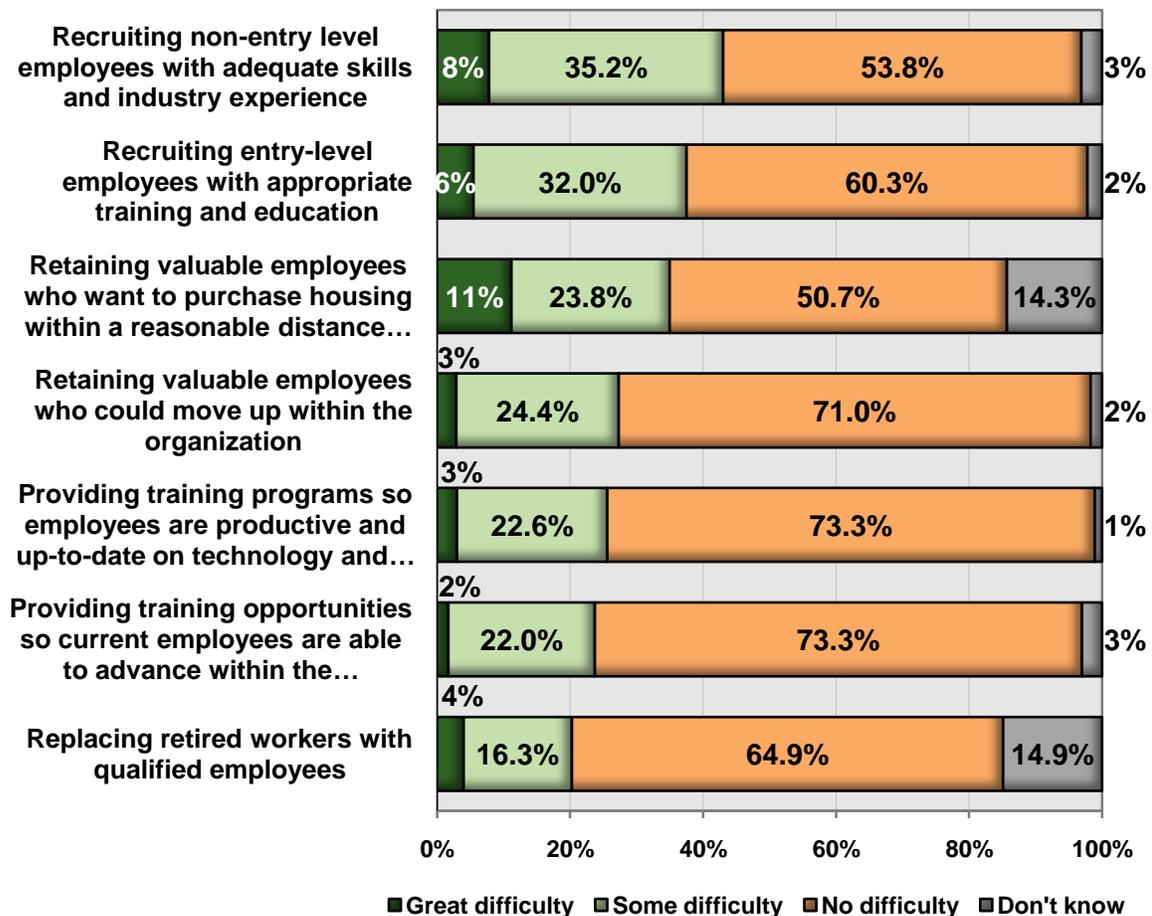
- Respondents from North County were more likely (49%) to offer employer-paid outside training as an employee development practice, whereas respondents from South County were the least likely (36%) to offer employer-paid outside training compared to other areas in the County.
- Employers from Finance, Insurance, and Real Estate (65%) were more likely to offer employer-paid outside training than employers from other industries.
- Firms with more employees, either in terms of the total employees in San Diego County or at a given location were more likely to use online ads to recruit new employees compared to their smaller counterparts.
- Sixty nine percent of the 26 firms that had interacted with San Diego Workforce Partnership and 64 percent of the 112 firms with informed awareness about Workforce Partnership offered employer-paid outside training to their employees compared to 43 percent among the 621 firms that were not aware of the San Diego Workforce Partnership.
- Employers from Health and Education (43%), Professional and Business Services (39%) and Construction (37%) were more likely to offer internships and apprenticeship programs compared to those employers in other industries.
- Employers that have great difficulty finding qualified applicants with less than a four-year degree were more likely (44%) to offer internships and apprenticeship programs than those employers that have no difficulty (25%).
- Finance, Insurance, and Real Estate employers were more likely (33%) to offer tuition assistance or reimbursement at a college or university than employers in other industries.

## WORKFORCE CHALLENGES

Seven hiring challenges were presented to the small businesses surveyed. In general, the majority of respondents reported no difficulty in recruiting, retaining, or developing their employees. With that said, just under 45 percent of employers indicated at least some difficulty recruiting non-entry level employees and overall difficulty was higher in certain industries and areas within the County. The employer difficulty results are not as high as has been reported in high-growth industry specific surveys, but are still relatively high for recruiting employees, given they represent employers across all industries and during a historically loose labor market, with unemployment at or near double figures.

Small businesses identified “Recruiting non-entry level employees with adequate skills and industry experience” as their top workforce challenge (43% difficulty). The second highest challenge, identified by 38 percent of employers was “Recruiting entry-level employees with appropriate training and education” followed by “Retaining valuable employees who want to purchase housing within a reasonable distance from work,” with 35 percent of firms expressing difficulty.

**Figure 22 Workforce Challenges**



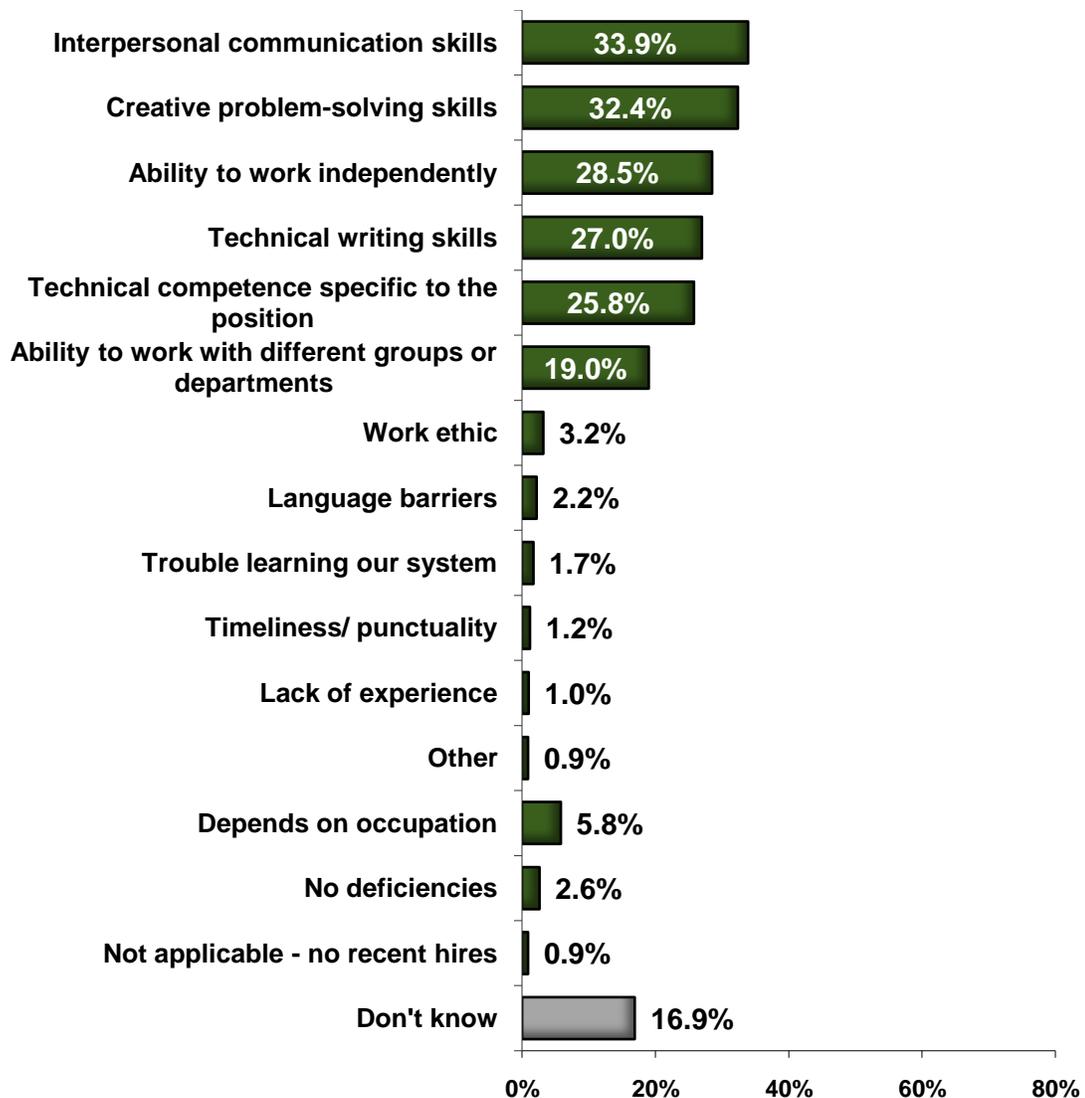
To follow is an analysis of employers' difficulty with the workforce challenges identified on the previous page.

- The majority of employers reported no difficulty in hiring.
- Over half of respondents from East County indicated at least some difficulty recruiting non-entry-level employees with adequate skills and experience. This was higher than any other area within the County.
- Over half of firms with less than 10 employees at their current location indicated at least some difficulty recruiting non-entry-level employees with adequate skills and experience. This was higher than those firms that had more than 10 employees at their current location.
- Employers from Construction (49%) and Health and Education (46%) were more likely to indicate at least some difficulty recruiting entry level employees with appropriate training and education compared to other industries within the County.
- Employers from North County were more likely to have great difficulty (13%) or indicate at least some difficulty (39%) retaining valuable employees who want to purchase housing within a reasonable distance from work than employers in other areas within the County.
- Employers from Health and Education (34%) were more likely to indicate at least some difficulty providing training opportunities so current employees are able to advance within the organization compared to other industries within the County.
- Employers from Construction (34%) and Health and Education (27%) were more likely to indicate at least some difficulty replacing retired workers with qualified employees compared to other industries within the County.

## SKILLS OF RECENT HIRES

Employers were next asked to think generally about recent hires at their organization and to identify any skills in which recent hires have the most trouble. Approximately one in three employers identified “Interpersonal communication skills” (34%) and “Creative problem-solving skills” (32%) as the two skills that recent hires have the most trouble with. “Ability to work independently” (29%), “Technical writing skills” (27%), and “Technical competence specific to the position” (26%) were also each identified by at least 25 percent of respondents. Interestingly, so-called “soft skills” like having a strong work ethic, punctuality, language issues, and even a lack of work experience were NOT considered problems. This finding is somewhat surprising given many people’s assumptions about employers’ problems with their workers.

**Figure 23 Skills Recent Hires Have Most Trouble With<sup>10</sup>**

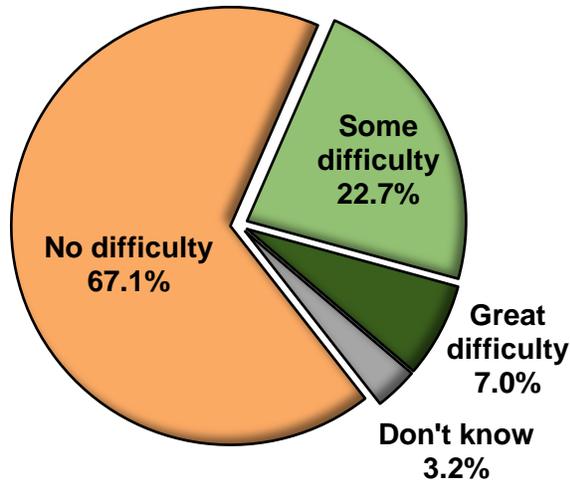


<sup>10</sup> Since respondents were free to mention multiple responses, the percentages will total more than 100%.

## DIFFICULTY FINDING APPLICANTS WITH LESS THAN A 4-YEAR DEGREE

Approximately 85 percent of small businesses indicated that they have employees with less than a four-year degree. Among those firms, two-thirds expressed no difficulty finding qualified applicants with less than a four-year degree and 30 percent expressed either “Great” (7%) or “Some difficulty” (23%).

**Figure 24 Difficulty Finding Applicants with Less than a Four-Year Degree (n=686)**



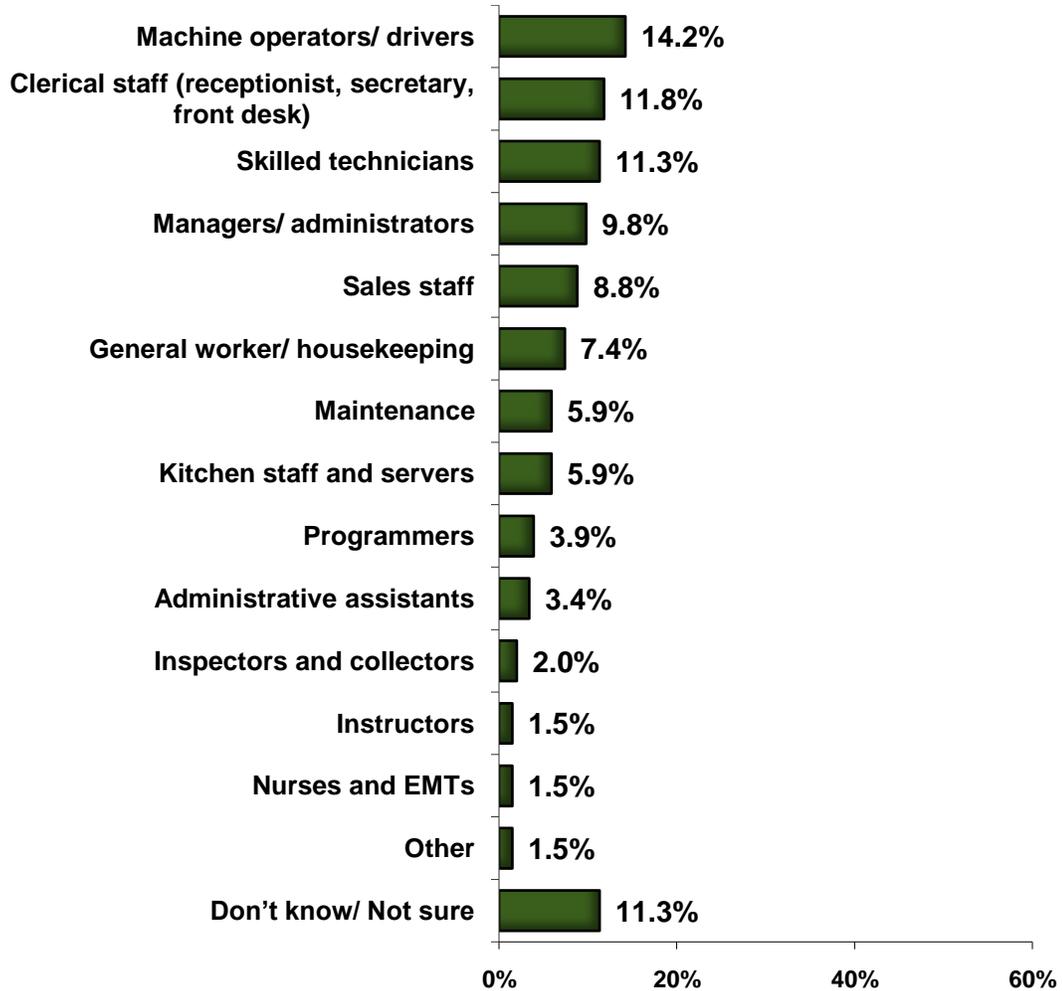
To follow is an analysis of employers' difficulty finding applicants with less than a four-year degree.

- Employers from Healthcare and Education (38% difficulty), Finance, Insurance, and Real Estate (37%), and Manufacturing (37%) were more likely to indicate they had at least some difficulty finding qualified applicants with less than a four-year degree.
- Respondents who represented firms with 10 or more total locations (43% difficulty) or five or more locations in San Diego County (52%) were more likely to have difficulty finding qualified applicants with less than a four-year degree, than those firms with fewer locations.

Firms that had difficulty finding qualified employees with less than a four-year degree (204 respondents, 25% of all firms) were next asked, in an open-ended format, to identify the occupations in which they have the most difficulty finding qualified applicants.

Responses to this question varied. Occupations cited by at least 10 percent of respondents were machine operators and drivers (14%), customer service staff and receptionists (12%), skilled technicians (11%), and managers and administrators (10%).

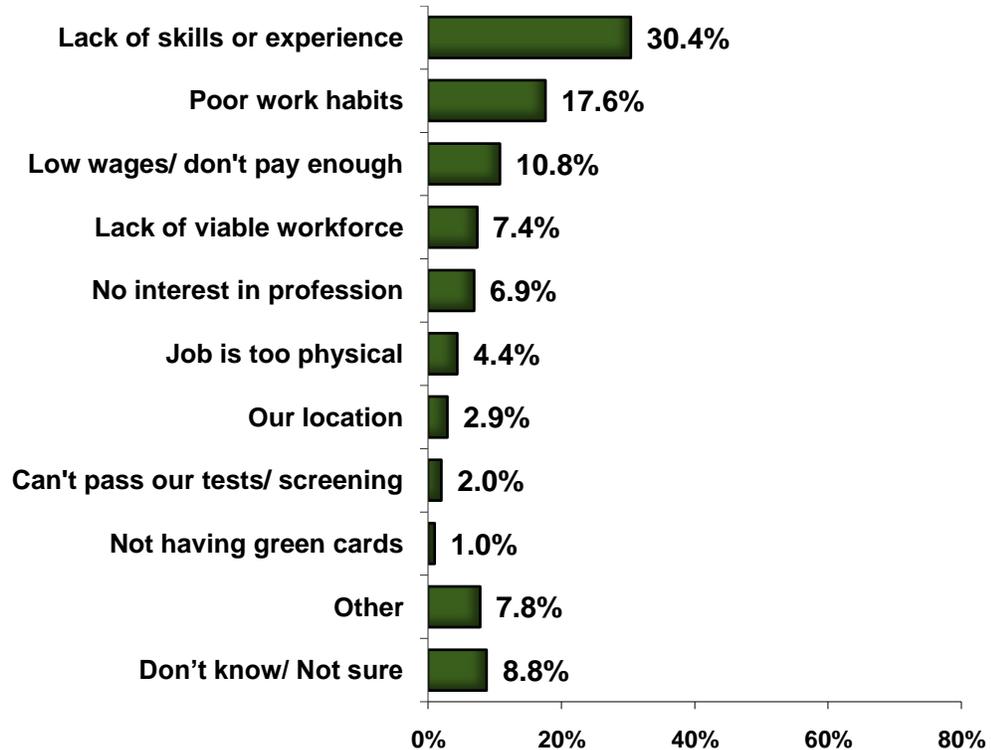
**Figure 25 Difficulty Finding Applicants with Less than a Four-Year Degree: Occupations (n=204)**



Firms with difficulty finding qualified employees with less than a four-year degree (204 respondents, 25% of all firms) were also asked, in an open-ended format, to reveal what they thought to be the main reasons they have difficulty finding qualified applicants for the occupations they identified.

Reasons related to applicants' "Lack of skills or experience" (30%) or "Poor work habits" (18%) were cited the most frequently among firms with difficulty finding qualified applicants with less than a four-year degree.

**Figure 26 Difficulty Finding Applicants with Less than a Four-Year Degree: Reasons (n=204)**



- Thirty-eight percent of employers who expressed difficulty finding qualified clerical staff with less than a four-year degree cited "Poor work habits" as the main reason for their difficulty.
- "Lack of skills or experience" was the main reason cited by firms with difficulty finding qualified machine operators or drivers (38% cited lack of skills or experience) and managers and administrators (30%).

## SMALL BUSINESS PROFILE

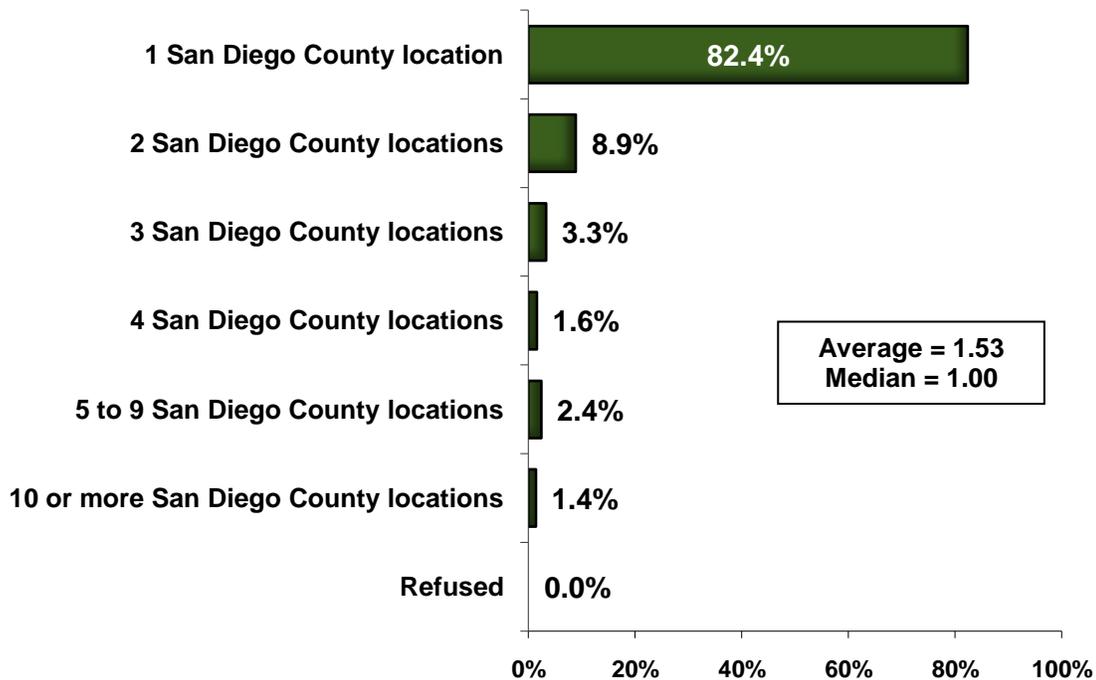
The methodology for this study focused on small businesses in the private sector with 10 to 100 employees in San Diego County. Firms with up to 150 employees were allowed to participate in the telephone survey as long as they were listed in the database from InfoUSA as having 10 to 100 employees. Web surveys distributed by industry partners also accepted firms with up to 150 employees. In total, 18 of the 806 firms surveyed (2%) had between 101 and 150 total county employees.

This section of the report summarizes the profile of small businesses surveyed, including growth expectations for the next 12 months.

### NUMBER OF LOCATIONS

Eighty-two percent of firms had one location in San Diego County, nine percent had two county locations, and nine percent three or more. The average number of county locations was 1.53 and the median 1.00.

**Figure 27 Number of San Diego County Locations**

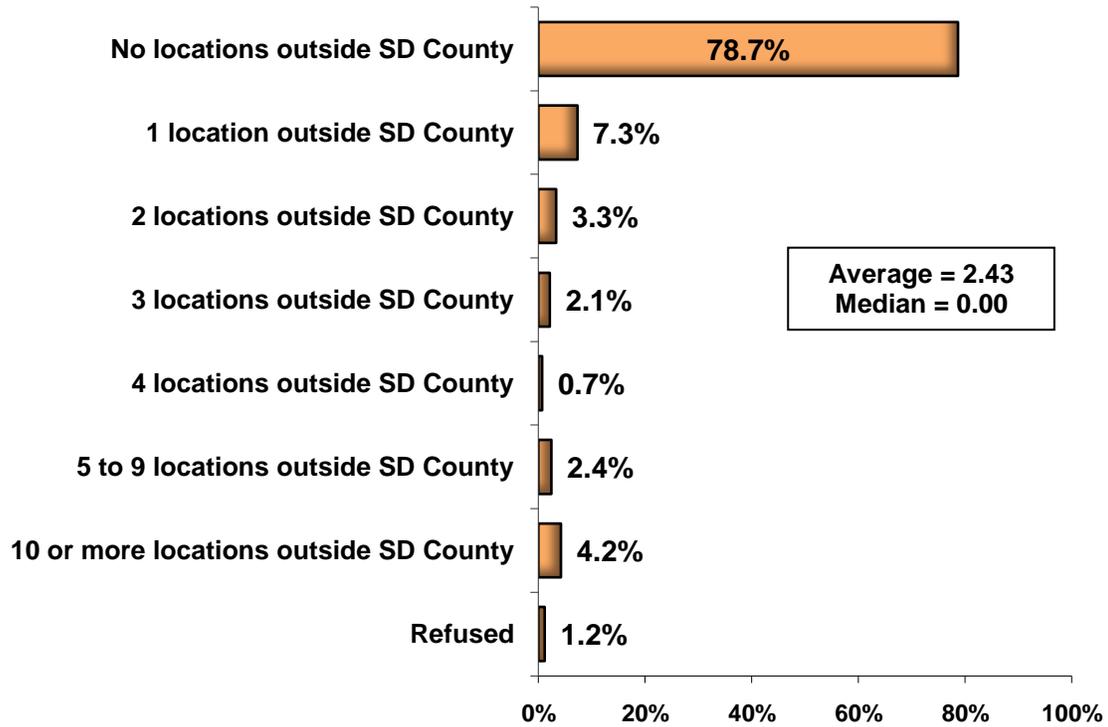


- Firms located in East County were the most likely to only have one San Diego County location (89%). Firms in the Metro region (13%) or South County (12%) were the most likely to have two county locations and firms in North County were the most likely to have three (11%).
- Over 20 percent of firms in Finance, Insurance, and Real Estate (28%), Healthcare and Education (28%), Hospitality and Leisure (27%), and Retail (24%) had two or more county locations.

Seventy-nine percent of firms did not have any locations outside the County, seven percent had one, and 13 percent had two or more location outside San Diego County.

The average number of locations outside the County was 2.43 and the median 0.00.

**Figure 28 Number of Locations Outside County**

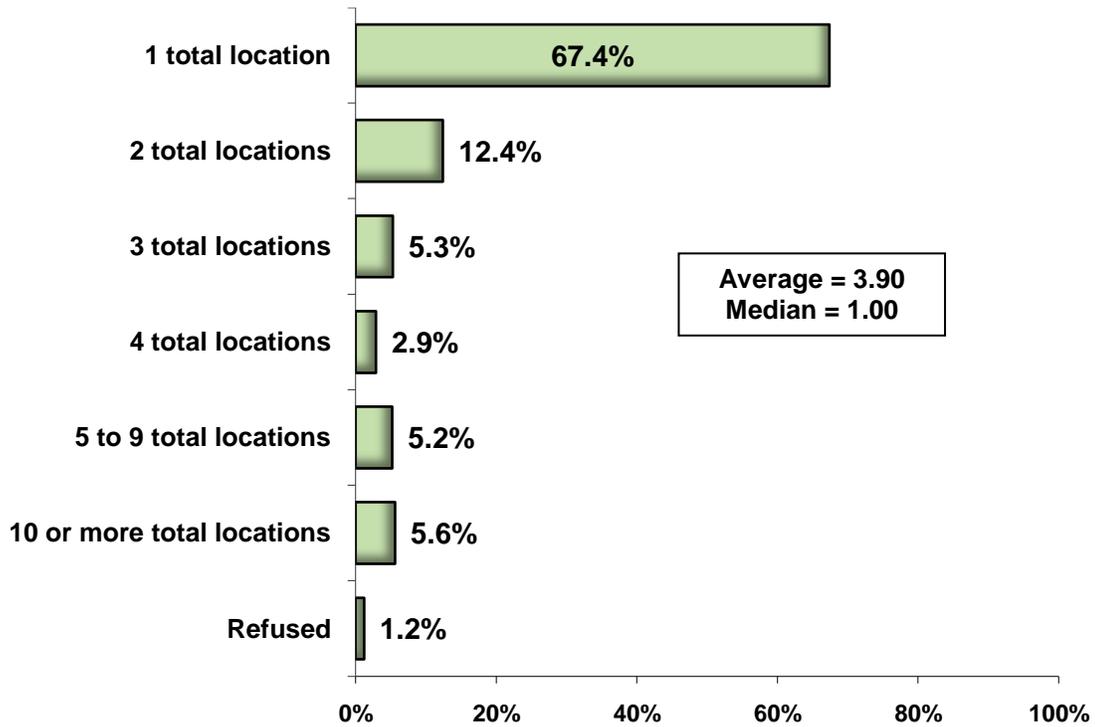


- Ninety-one percent of firms located in East County did not have any locations outside San Diego County.
- Firms classified as Transportation and Trade or Finance, Insurance, and Real Estate were the most likely to have at least one location outside the County.

In total, 67 percent of firms only had one business location, 12 percent had two total locations, and 19 percent three or more total locations.

The average number of total locations was 3.90 and the median 1.00.

**Figure 29 Total Number of Locations**



- Firms located in East County were the most likely to only have one total location (83%).
- Finance, Insurance, and Real Estate (47%) and Retail (40%) firms were the most likely to have two or more total locations.

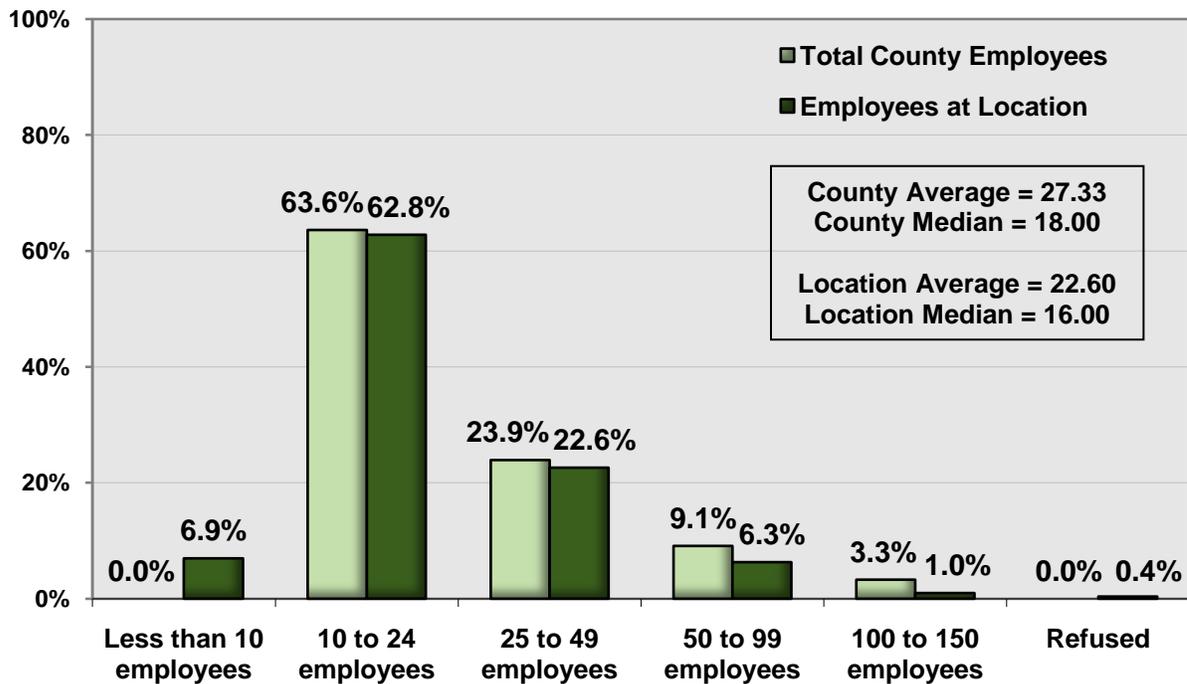
## NUMBER OF EMPLOYEES

Six in 10 firms surveyed had 10 to 24 total employees (includes permanent and temporary) in San Diego County (64%) and at their location (66%) and approximately one in four had 25 to 49 employees in the County (24%) and at their location (27%).

The average number of total county employees was 27.33 and the median 18.00.

The average number of employees at each respondent's location was 22.60 and the median 16.00.

**Figure 30 Total Employees in San Diego County and at Location**

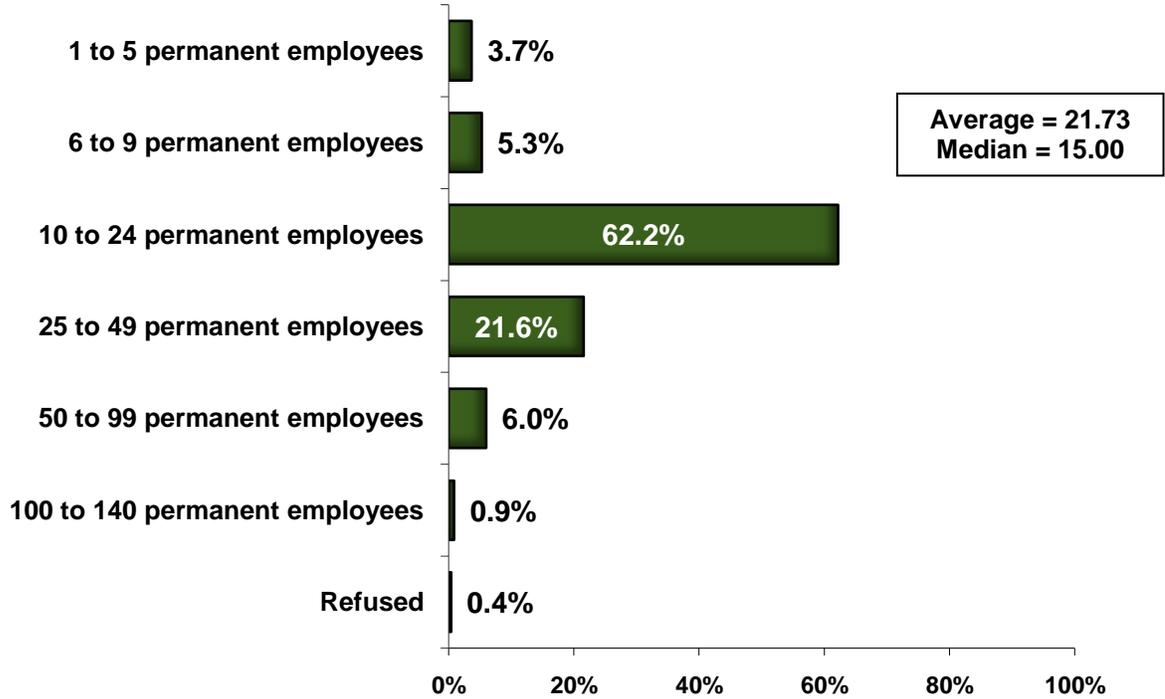


**Permanent Employees**

Eighty-four percent of firms had either 10 to 24 (62%) or 25 to 49 (22%) full-time and part-time permanent employees at their location.

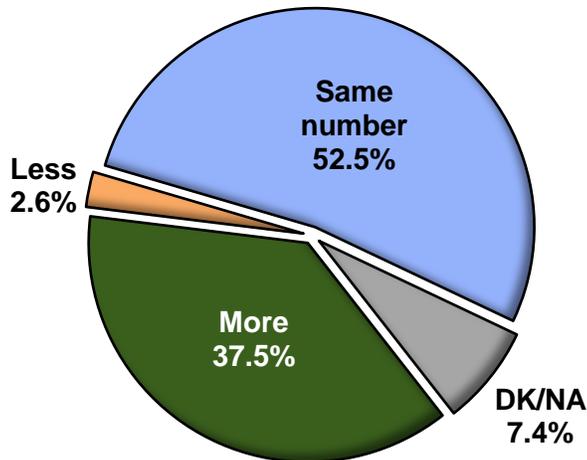
The average number of permanent employees was 21.73 and the median 15.00.

**Figure 31 Number of Permanent Employees at Location**



The majority of firms (53%) expected to have the same number of permanent employees at their location 12 months from the time of the survey, 38 percent expected to have more permanent employees, three percent forecasted less, and seven percent were not sure or declined to state. The expected growth rate for permanent employees was 8.3 percent.

**Figure 32 One Year Growth Expectations for Permanent Employees at Location**



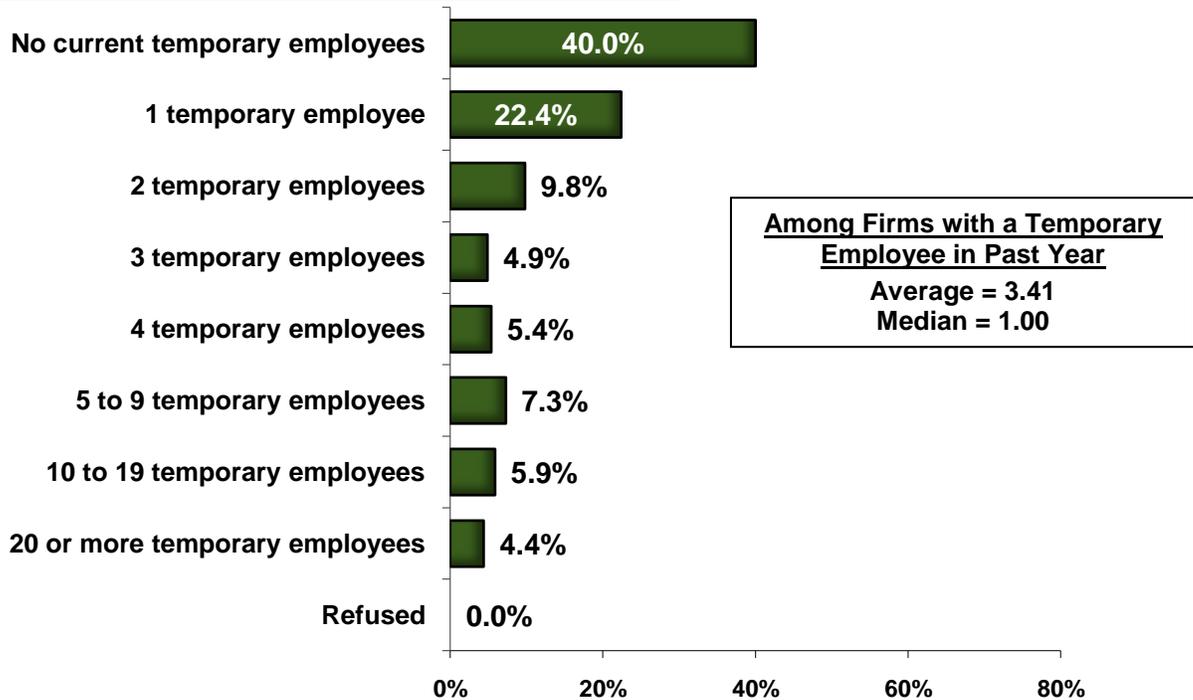
- A higher than average percentage of firms in South County (6%) and Construction firms (8%) expected to have less permanent employees at their location in one year.
- Approximately 49 percent of firms with an annual sales revenue less than \$500,000 expected more permanent employees at their location in 12 months.
- Two out of three (67%) firms with 50 or more permanent employees at their location expected to have the same number 12 months from the time of the survey.

### Temporary Employees

One in four (25%) firms had hired a temporary employee at its location within the last year. Among those firms, 40 percent did not have any current temporary employees (although they had hired at least one within the past year) and 22 percent had one temporary employee.

Among firms that had hired a temporary employee within the past year, the average number currently employed was 3.41 and the median 1.00.

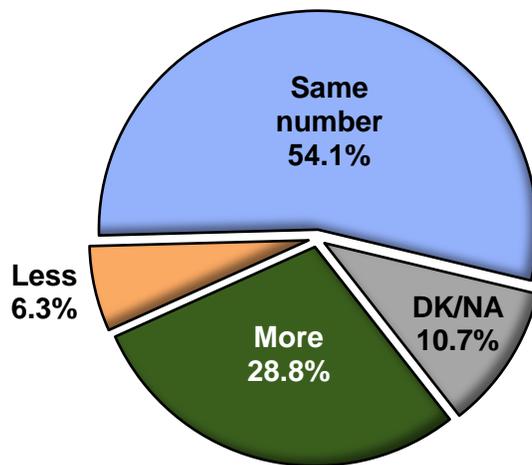
**Figure 33 Number of Temporary Employees at Location (n=205)**



- Firms located in the South County (36%) and Manufacturing firms (38%) were the most likely to indicate that they have hired a temporary employee within the past year.
- Firms with at least 25 employees at their location were much more likely to have hired a temporary employee at their location than those with less than 25 total employees (34% vs. 22%).
- Firms with 50 or more employees with less than a four-year degree at their location were the most likely to have hired a temporary employee within the past year (48%).

Among firms that have hired a temporary employee within the past year, the majority (54%) expected to have the same number of temporary employees at their location 12 months from the time of the survey, 29 percent expected to have more, six percent forecasted less, and 11 percent were not sure or declined to state. The expected growth rate for temporary employees was 30.7 percent.

**Figure 34 One Year Growth Expectations for Temporary Employees at Location (n=205)**



- Fifty-four percent of the firms in Hospitality and Leisure that had hired a temporary employee within the past year expected to hire more over the next year.

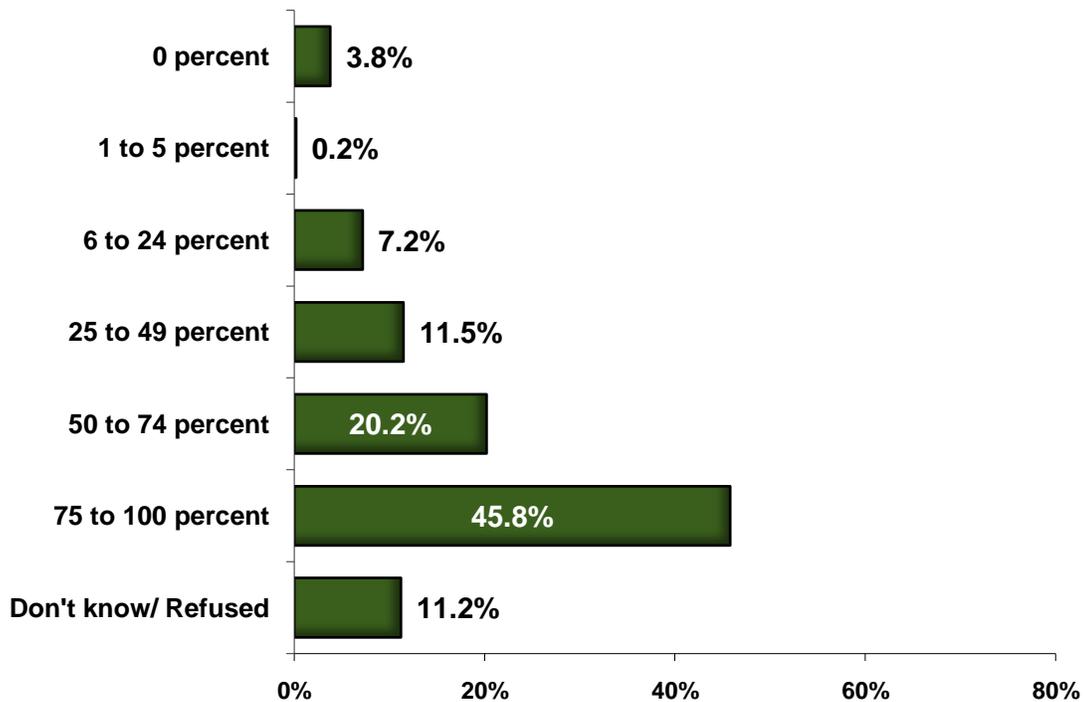
### ***Employees with Less than a Four-Year Degree***

Close to two-thirds (66%) of firms indicated that 50 to 100 percent of their employees have less than a four-year degree.

The average number of employees with less than a four-year degree among firms surveyed was 14.51 and the median 11.00.

Among firms surveyed, 66 percent of employees had less than a four-year degree.

**Figure 35 Percentage of Employees at Location with Less than a Four-Year Degree**



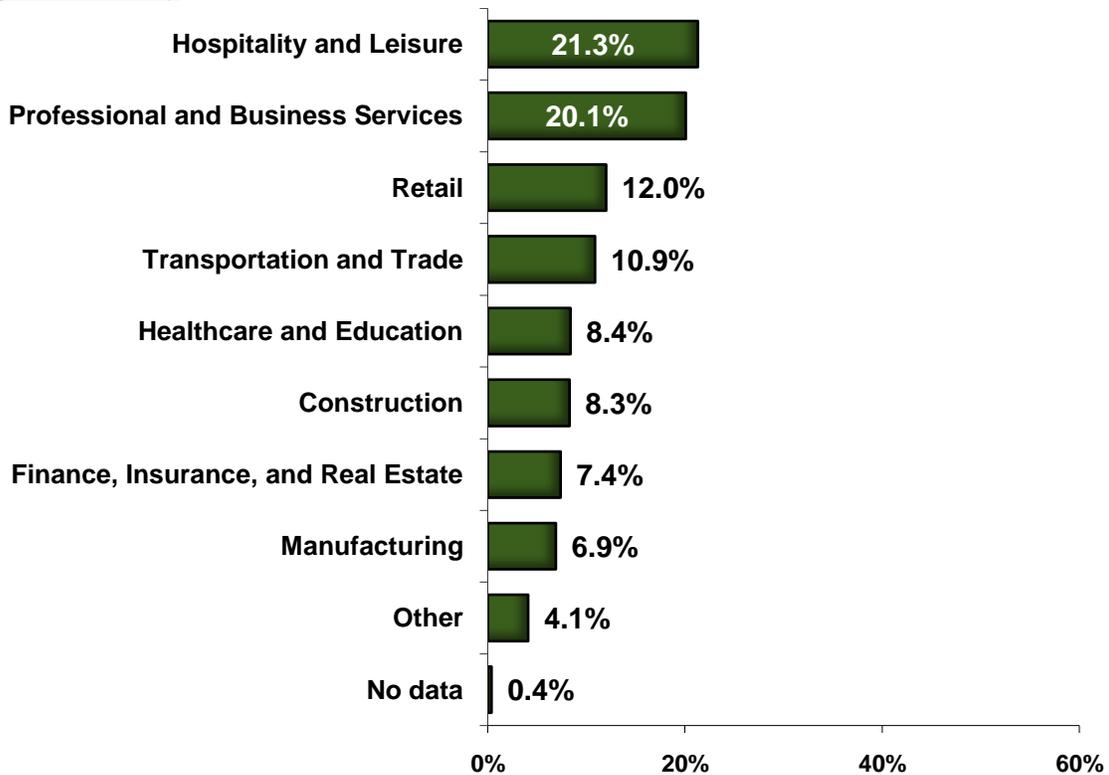
- Sixty-seven percent of firms in East County reported that 75 to 100 percent of their employees have less than a four-year degree.
- A higher than average percentage of firms in Finance, Insurance, and Real Estate (10%) and Professional and Business Services (8%) reported that none of their employees have less than a four-year degree.

## INDUSTRY

Firms were classified into industries according to their SIC (Standard Industrial Classification) code provided in the sample by InfoUSA.

The percentage of firms surveyed within each industry reflects the overall breakdown of private-sector small businesses within the County.

Figure 36 Industry



The table below shows the industry breakdown of respondents by their geographic location, with the top three industries within each region highlighted.

Comparing the percentage of firms in each industry by region reveals that: North County firms have the highest concentration of Hospitality and Leisure (25%); East County firms the highest concentration of Construction firms; and South County the highest concentration of Transportation and Trade (20%).

**Table 1 Industry Breakdown by Region**

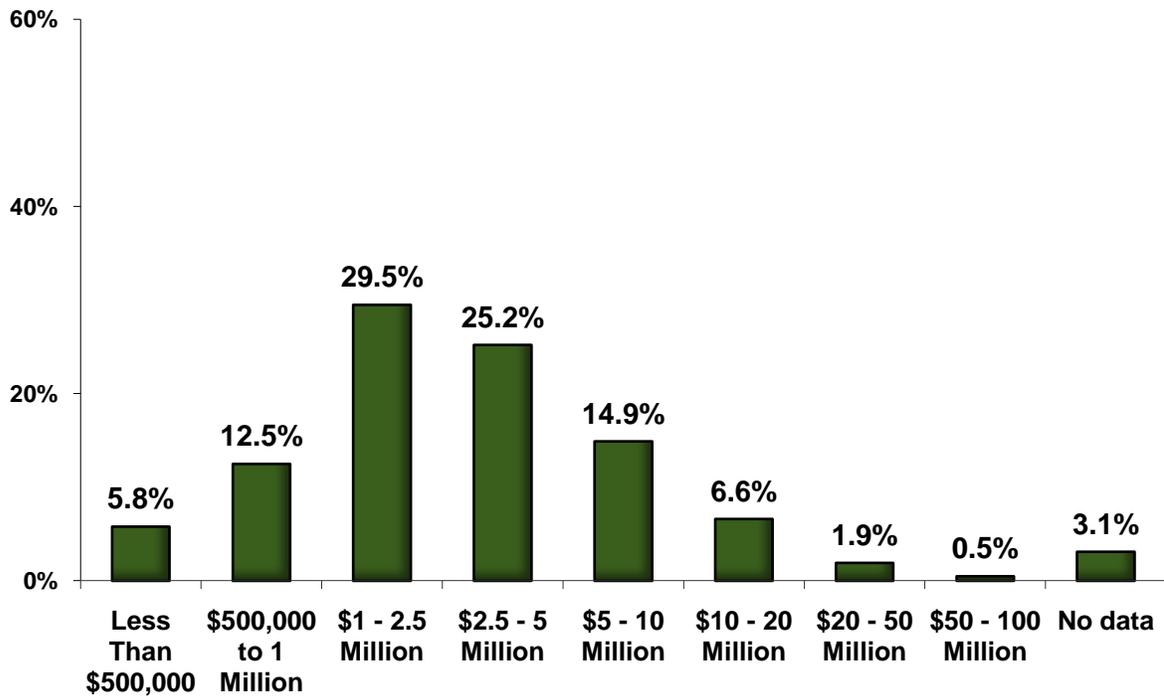
	Overall	East	North	Metro	South
Hospitality and Leisure	21.3% (1)	17.0% (3)	25.3% (1)	18.5% (2)	19.7% (1)
Professional and Business Services	20.1% (2)	17.9% (1)	22.2% (2)	19.9% (1)	13.6%
Retail	12.0% (3)	10.4%	11.4% (3)	12.5% (3)	16.7% (3)
Transportation and Trade	10.9%	11.3%	8.9%	11.4%	19.7% (1)
Healthcare and Education	8.4%	9.4%	8.1%	8.9%	7.6%
Construction	8.3%	17.9% (1)	6.1%	8.5%	4.5%
Finance, Insurance, and Real Estate	7.4%	3.8%	8.9%	7.0%	7.6%
Manufacturing	6.9%	8.5%	6.1%	7.7%	6.1%
Other	4.1%	3.8%	3.1%	5.5%	4.5%

## REVENUE

The figure below shows the annual sales revenue of private-sector small businesses surveyed as provided in the database from InfoUSA.

The majority (54%) of firms had sales revenue of one to five million dollars.

**Figure 37 Annual Sales Revenue**

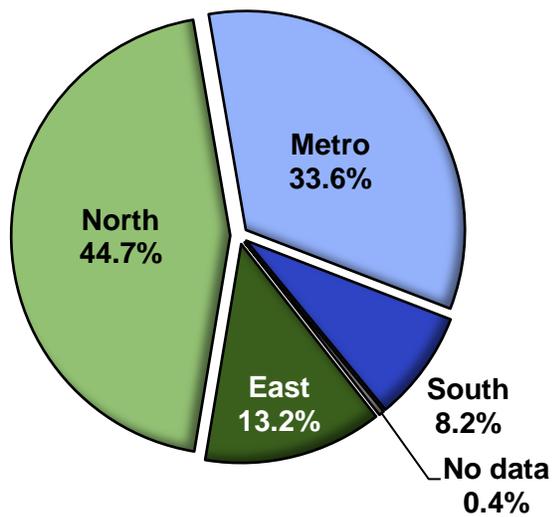


## REGION

Most private-sector small businesses surveyed were located in either North County (45%) or the Metro (34%) region of San Diego County.

The percentage of firms surveyed by region reflects the overall breakdown of private-sector small businesses within the County. Please note that the chart below displays the concentration of private-sector *small* businesses in San Diego County and does not display data for all businesses (e.g., small, medium, and large).

**Figure 38 Firm Location**



## METHODOLOGY

The table below provides a brief overview of the methodology utilized for the project.

**Table 2 Overview of Project Methodology**

<b>Method</b>	Telephone and Web Survey of Private-Sector Small Businesses in San Diego County with 10 to 100 Employees
<b>Number of Participants</b>	806 Firms Completed a Survey (796 by Phone; 10 Online)
<b>Field Dates</b>	March 24 – April 14, 2010
<b>Survey Universe</b>	9,838 Private-Sector County Businesses with 10 to 100 Employees
<b>Margin of Error</b>	The <i>maximum</i> margin of error for questions answered by all 806 respondents is +/-3.31% at the 95% level of confidence.

## RESEARCH OBJECTIVES

Prior to beginning the project, BW Research met with the San Diego Workforce Partnership, Inc. to determine the research objectives for the study. Viewed broadly, the main research objectives of the study were to:

- Evaluate awareness (aided, unaided, informed, and uninformed) and perception of San Diego Workforce Partnership;
- Assess awareness of one-stop career centers in San Diego County;
- Identify methods of recruiting new employees and use of outside agencies for assistance with finding and developing qualified workers;
- Understand small businesses' current workforce challenges; and
- Develop a profile of private-sector small businesses in San Diego County.

## QUESTIONNAIRE DESIGN

Through an iterative process, BW Research worked closely with San Diego Workforce Partnership to develop a survey instrument that met all the research objectives of the study. In developing the instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey.

## **SAMPLING METHOD**

A mixed-method approach (telephone and web) was utilized to interview a representative sample of private-sector small businesses in San Diego County with 10 to 100 employees. A database of all known firms matching the study parameters was purchased from InfoUSA and represents the universe for the study (9,838 firms).

The universe of firms was stratified based on size, geographic location, and industry. Firms were then grouped into clusters with others sharing their same profile and then randomly selected to complete a survey from within their cluster. If a particular firm refused to participate in the survey, it was replaced with another randomly selected firm from that cluster that shared the same profile. As such, the resulting sample of businesses surveyed is representative of the larger universe of private-sector small businesses in San Diego County with 10 to 100 employees.

Although the primary method of data collection was telephone, the web version of the survey was offered to firms that were not interested in the telephone version. The web version was also distributed by San Diego Workforce Partnership's contacts at local Economic Development Corporations and Chambers of Commerce. During data processing, the data were checked to ensure that no individual firm completed the survey more than once (for example by phone and web).

The methodology for this study focused on small businesses in the private sector with 10 to 100 employees in San Diego County. Firms with up to 150 employees were allowed to participate in the telephone survey as long as they were listed in the database from InfoUSA as having 10 to 100 employees. Web surveys distributed by industry partners also accepted firms with up to 150 employees. In total, 18 of the 806 firms surveyed (2%) had between 101 and 150 total county employees.

## **DATA COLLECTION**

Prior to beginning data collection, BW Research conducted interviewer training and also pre-tested the survey instrument to ensure that all the words and questions were easily understood by respondents. Telephone interviews were generally conducted from 9:00 am to 4:30 pm Monday through Friday. Callbacks were also scheduled at respondents' convenience.

The web version of the survey was distributed by industry partners (Economic Development Corporations and Chambers of Commerce) to their membership with a general invitation to complete a survey. The survey was not identified as San Diego Workforce Partnership to maintain a clean read on the awareness questions.

The data collection period was March 24 through April 13, 2010.

## **A NOTE ABOUT MARGIN OF ERROR AND ANALYSIS OF SUB-GROUPS**

The overall margin of error for the survey, at the 95 percent level of confidence, is between +/- 1.98 percent and +/- 3.31 percent (depending on the distribution of each question) for questions answered by all 806 respondents.

It is important to note that questions asked of smaller sub-groups (such as questions only asked of firms with temporary employees) or analysis of sub-groups (such as differences by number of locations) will have a margin of error greater than +/-3.31 percent, with the exact margin of error dependent on the number of respondents within each sub-group as well as the distribution of responses.

BW Research has utilized statistical testing to account for the margin of error within sub-groups and has highlighted statistically significant sub-group differences throughout this report.

## APPENDIX A: SURVEY TOPLINES



**SDC –Small Business Employers**  
**May 2010**  
**Toplines**

### San Diego County Awareness and Workforce Research (n=806)

.....  
**Introduction:**

Hello, my name is \_\_\_\_\_. May I please speak to a Human Resources Manager or person responsible for staffing at [organization]?

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of a **San Diego County Economic Planning Agency**, who would value your participation in a brief survey that will be used to develop a stronger response to supporting employers within San Diego County. The findings from this survey will play a valuable role in determining the County's use of stimulus funds from the federal and state government.

**(If needed):** This survey has been commissioned by a San Diego organization that is committed to supporting the region's employers.

**(If needed):** The survey is being conducted by BW Research, an independent research organization, and should only take approximately ten minutes of your time.

**(If needed):** Your individual responses will **not** be published; only aggregate information will be used in the reporting of the survey results.

.....  
**Traditional Rounding Rules Applied - Percentages Rounded to the Nearest Whole Number; Percentages May Not Add to Exactly 100%**  
.....

**Screenener Questions**

A. Are you involved in staffing or hiring decisions at your firm or organization?

100% Yes [CONTINUE]

B. Is your firm or organization located within San Diego County?

100% Yes [CONTINUE]

C. Is your firm or organization best characterized as private sector, government or public sector, or a non-profit entity?

100% Private sector [CONTINUE]

D. Including all permanent and temporary employees, how many total employees does your firm employ in San Diego County?

<u>Total # Employees</u>	<u>Mean</u>	<u>Median</u>
22,024	27.33	18.00

Breakdown

64%	10 to 24 employees
24%	25 to 49 employees
9%	50 to 99 employees
3%	100 to 150 employees

Proceed if 10-150 employees, terminate if 9 or less or 151 or more employees

.....

### Awareness Questions

I'd like to begin by asking you about different kinds of organizations that provide employer services to help find qualified workers and help train your current employees.

1. Do you know the name of any agencies or organizations in the County that could assist your firm in finding qualified workers, or training and developing your current employees? (DO NOT READ – ACCEPT FIRST TWO RESPONSES)  
[If needed: And what are the names of those agencies or organizations?]

- 15% Yes, temporary and staffing agencies  
*Multiple Response – Total Will Add to More than 15%*
  - 3% Apple One
  - 2% Labor Ready
  - 1% Manpower
  - 1% Robert Half
  - 1% Paychex
  - 10% Other (less than 0.5% each)
- 5% Yes, A local community college, trade, or vocational school (Specify:\_\_\_\_)  
*Multiple Response – Total Will Add to More than 5%*
  - 1% Regional occupational programs (ROP)
  - 1% Southwestern Community College
  - 1% Kaplan College
  - 3% Other (less than 0.5% each)
- 4% Yes, EDD/ Unemployment Office
- 3% Yes, various associations and organizations
- 1% Yes, trade unions
- 1% Yes, A regional university (Specify university: \_\_\_\_\_)  
*Multiple Response – Total Will Add to More than 1%*
  - 1% UCSD/ UCSD Extension
  - 1% Other (less than 0.5% each)
- 1% Yes, Monster.com
- 1% Yes, Craigslist
- 1% Yes, San Diego Workforce Partnership
- 0% Yes, A one-stop career center (Specify location: \_\_\_\_\_)
- 4% Yes, Other (Please specify: \_\_\_\_\_)
- 2% Yes, but can't remember name
- 61% No, do not know of any agencies/ organizations
- 5% Don't know/ Not sure

2. Have you ever heard, read, or seen anything about the San Diego Workforce Partnership, and if so, have you ever had any interaction with this organization?

- 3% Yes and I have interacted with the San Diego Workforce Partnership
- 19% Yes, I have heard about San Diego Workforce Partnership but I have not had any interaction
- 77% No, I have not heard of San Diego Workforce Partnership
- 1% (Don't Read) DK/NA

[IF Q2=3 OR 4, SKIP TO Q6]

**Question 3, 4, and 5 Were Only Asked of Firms Aware of SDWP (n=177)**

3. Where did you hear, read, or see the information about San Diego Workforce Partnership? (DO NOT READ - RECORD UP TO THREE RESPONSES)

**Percentages among Those Aware of SDWP (n=177)**

- 12% Word of mouth, colleagues or associates - professional network
- 11% Internet
- 10% San Diego Union Tribune
- 9% Mail, direct mail
- 5% Word of mouth, friends and family - social network
- 8% Television
- 5% EDD
- 3% Chamber of Commerce
- 2% Contact with or visit by SDWP
- 2% Associations and organizations
- 2% Signage
- 2% Radio
- 2% Job fairs
- 1% Magazines
- 1% Educational partners (Specify: \_\_\_\_\_)
  - 1% San Diego City College
- 3% Other news outlets and newspapers
- 2% Other (Specify: \_\_\_\_\_)
- 27% Don't know/ Not sure

4. What first comes to mind when you think about San Diego Workforce Partnership?  
[DO NOT READ, ALLOW FIRST TWO RESPONSES]

**Percentages among Those Aware of SDWP (n=177)**

14%	Employment services
9%	Training
9%	Staffing
5%	Partnership, linking job seekers with companies looking for employees
5%	Government agency
3%	Customized training programs
3%	One-stop employment centers
3%	Programs to get employment for at-risk youth
3%	Employer services
3%	Great idea/ excellent program
2%	Labor market research
2%	Great source of information
0%	Industry cluster research
0%	Partnerships with colleges for training and certificates
6%	Other (Please specify: _____)
26%	No services or programs come to mind
11%	DK/NA

5. Overall, would you say that you have a favorable or unfavorable opinion about San Diego Workforce Partnership? (GET ANSWER, THEN ASK:) Would that be very (favorable/unfavorable) or somewhat (favorable/unfavorable)?

**Percentages among Those Aware of SDWP (n=177)**

10%	Very favorable
38%	Somewhat favorable
1%	Somewhat unfavorable
0%	Very unfavorable
51%	(Don't Read) DK/NA

6. Have you ever heard, read, or seen anything about a one-stop career center in San Diego County, and if so, have you ever had any interaction with a one-stop center in San Diego County?

- 2% Yes, and I have interacted with a one-stop career center
- 8% Yes, I have heard about a one-stop career but I have had no interaction
- 90% No, I have not heard of a one-stop career center
- 1% (Don't Read) DK/NA

**Usage Questions**

Now I want to ask about your firm's hiring practices.

7. I'm going to read a list of ways that your firm finds and recruits new employees. Please tell me if your firm uses these methods to find or recruit qualified applicants.

Here's the (first/next) one \_\_\_\_\_ (READ ITEM): Please tell me whether your firm has used this method to find or recruit qualified applicants.

RANDOMIZE

		<u>Yes, Have Used</u>	<u>No, Have Not Used</u>	<u>(Don't Read) Don't Know</u>
A. Ad in a newspaper .....	48%	51%	1%	
B. Online ad, such as monster.com or jobing.com .....	62%	62%	37%	1%
C. Job fairs.....	9%	9%	91%	1%
D. Industry trade organizations or associations.....	32%	32%	66%	1%

8. Next, I'm going to read a list of services that a firm like yours might use for outside help in finding or developing qualified workers. Please tell me if your firm has used an outside agency or organization for the following services.

Here's the (first/next) one \_\_\_\_\_ (READ ITEM): Please tell me whether your firm has used an outside agency for this service.

RANDOMIZE

		<u>Yes, Have Used Outside Agency</u>	<u>No, Have Not Used Outside Agency</u>	<u>(Don't Read) Don't Know</u>
A. Recruitment of job applicants .....	14%	14%	86%	1%
B. Pre-screening of job-applicants .....	18%	18%	82%	0%
C. Temporary hiring .....	27%	27%	73%	0%
D. Full-time hiring or a headhunter.....	12%	12%	87%	1%
E. Job training, including new skills training.....	13%	13%	87%	1%
F. Assistance with lay-offs .....	3%	3%	97%	1%

[IF ALL Q8 A - F = 2 OR 3, SKIP TO Q11]  
[FOR EVERY Q8 A - F = 1, ASK Q9 AND Q10]

**A. Recruitment of Job Applicants (n=110)**

9. What service provider have you primarily used for **recruitment of job applicants**?  
(DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER)?

**Percentages among Those That Have Used an Outside Agency for Recruitment of Job Applicants (n=110)**

- 40% A private placement firm like Manpower (Specify \_\_\_\_\_)
- 6% Robert Half
- 5% Apple One
- 2% Davidson
- 2% Account Temps
- 25% Other (1 response each)
- 1% Don't remember the name
- 9% Craigslist
- 5% Monster.com
- 4% Word of mouth
- 4% San Diego Union Tribune/ newspapers
- 3% A local community college, trade, or vocational school (Specify \_\_\_\_\_)
- 0% San Diego Workforce Partnership
- 0% A one-stop career center (Specify location: \_\_\_\_\_)
- 0% A regional university (Specify university: \_\_\_\_\_)
- 10% Other (Please specify: \_\_\_\_\_) (1 response each)
- 26% Don't know/ Not sure

10. Generally speaking, how would you rate the **recruitment of job applicants** provided by the service provider, or do you not have an opinion?

**Percentages among Those That Have Used an Outside Agency for Recruitment of Job Applicants (n=110)**

- 16% Excellent
- 46% Good
- 16% Fair
- 4% Poor
- 3% Very poor
- 12% No opinion
- 4% (Don't Read) DK/NA

**B. Pre-Screening of Job-Applicants (n=143)**

What service provider have you primarily used for **pre-screening of job-applicants**? (DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER]?

**Percentages among Those That Have Used an Outside Agency for Pre-Screening of Job-Applicants (n=143)**

- 43% A private placement or screening firm (Specify \_\_\_\_\_)
  - 8% ADP
  - 3% Apple One
  - 2% Robert Half
  - 2% Account Temps
  - 1% Sterling Staffing
  - 1% Life Scan
  - 1% Kroll Background Services
  - 21% Other (1 response each)
  - 2% Don't remember the name
- 10% General drug screening or background check services
- 2% Private investigator
- 1% A local community college (Specify college: \_\_\_\_\_) (1 response)
  - 1% Southwestern College
- 1% A regional university (Specify university: \_\_\_\_\_) (1 response)
  - 1% UCSD
- 0% Monster.com
- 0% A one-stop career center (Specify location: \_\_\_\_\_)
- 0% San Diego Workforce Partnership
- 6% Other (Please specify: \_\_\_\_\_) (1 response each)
- 38% Don't know/ Not sure

Generally speaking, how would you rate the **pre-screening of job-applicants** provided by the service provider, or do you not have an opinion?

**Percentages among Those That Have Used an Outside Agency for Pre-Screening of Job-Applicants (n=143)**

- 36% Excellent
- 32% Good
- 6% Fair
- 2% Poor
- 2% Very poor
- 16% No opinion
- 6% (Don't Read) DK/NA

**C. Temporary Hiring (n=219)**

What service provider have you primarily used for **temporary hiring**? (DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER]?

**Percentages among Those That Have Used an Outside Agency for Temporary Hiring (n=219)**

71%	A private placement firm like Manpower (Specify_____)	
8%	Apple One	1% Kelly Staffing
5%	Labor Ready	1% Eastridge Group
3%	Man Power	1% Office Works
3%	Express	1% Account Temps
2%	Aerotek	1% Staff Works
2%	GoStaff	1% Office Team
2%	Labor Finders	1% Pridestaff
2%	Volt	1% TLC Staffing
2%	TriStaff	1% Tops Staffing
2%	Robert Half	25% Other (1 response each)
1%	Davidson	4% Don't remember the name
1%	Ultimate Staffing	
1%	Craigslist	
1%	Various trade unions	
1%	A regional university (Specify university: _____)	
	0.5% SDSU	
	0.5% Name withheld by respondent	
1%	Word of mouth	
0%	San Diego Workforce Partnership	
0%	A local community college (Specify college: _____)	
0%	A one-stop career center (Specify location: _____)	
4%	Other (Please specify: _____) (1 response each)	
21%	Don't know/ Not sure	

Generally speaking, how would you rate the **temporary hiring** provided by the service provider, or do you not have an opinion?

**Percentages among Those That Have Used an Outside Agency for Temporary Hiring (n=219)**

18%	Excellent
50%	Good
18%	Fair
3%	Poor
1%	Very poor
8%	No opinion
2%	(Don't Read) DK/NA

**D. Full-Time Hiring or a Headhunter (n=99)**

What service provider have you primarily used for **full-time hiring or a headhunter**?  
[DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER]?

**Percentages among Those That Have Used an Outside Agency for Full-Time Hiring or a Headhunter (n=99)**

- 55% A private placement firm like Manpower (Specify \_\_\_\_\_)
- 8% Robert Half
- 8% Apple One
- 2% TriStaff
- 2% Legend
- 31% Other (1 response each)
- 3% Don't remember the name
- 3% Monster.com
- 3% Craigslist
- 1% A local community college, trade, or vocational school (Specify: \_)
- 1% Southwestern College (1 response)
- 0% San Diego Workforce Partnership
- 0% A one-stop career center (Specify location: \_\_\_\_\_)
- 0% A regional university (Specify university: \_\_\_\_\_)
- 3% Other (Please specify: \_\_\_\_\_) (1 response each)
- 35% Don't know/ Not sure

Generally speaking, how would you rate the **full-time hiring or headhunting**  
[INSERT SERVICE FROM Q8] provided by the service provider, or do you not have  
an opinion?

**Percentages among Those That Have Used an Outside Agency for Full-Time Hiring or a Headhunter (n=99)**

- 20% Excellent
- 47% Good
- 14% Fair
- 3% Poor
- 2% Very poor
- 11% No opinion
- 3% (Don't Read) DK/NA

**E. Job Training, Including New Skills Training (n=102)**

What service provider have you primarily used for **job training, including new skills training**? (DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER)?

**Percentages among Those That Have Used an Outside Agency for Job Training, Including New Skills Training (n=102)**

- 13% Various training services
- 9% Various professional associations
- 5% A private placement firm like Manpower (Specify \_\_\_\_\_)
  - 3% ADP
  - 2% Other
- 4% A local community college, trade, or vocational school (Specify: \_)
  - 1% Cuyamaca College
  - 1% Grossmont College
  - 1% Mira Costa College
  - 1% Palomar College
- 3% Skill Path
- 3% Various trade unions
- 2% A regional university (Specify university: \_\_\_\_\_)
  - 1% UCSD
  - 1% Law school
- 0% San Diego Workforce Partnership
- 0% A one-stop career center (Specify location: \_\_\_\_\_)
- 0% Monster.com
- 37% Other (Please specify: \_\_\_\_\_) (1 response each)
- 25% Don't know/ Not sure

Generally speaking, how would you rate the **job training, including new skills training** provided by the service provider, or do you not have an opinion?

**Percentages among Those That Have Used an Outside Agency for Job Training, Including New Skills Training (n=102)**

- 38% Excellent
- 41% Good
- 6% Fair
- 0% Poor
- 1% Very poor
- 12% No opinion
- 2% (Don't Read) DK/NA

**F. Assistance with Lay-Offs (n=23)**

What service provider have you primarily used for **assistance with lay-offs**? (DO NOT READ – ACCEPT FIRST RESPONSE, PRIMARY PROVIDER)?

**Percentages among Those That Have Used an Outside Agency for Assistance with Lay-Offs (n=23)**

- 44% A private placement firm like Manpower (Specify \_\_\_\_\_)
- 13% ADP
- 13% Various payroll companies
- 17% Other (1 response each)
- 9% Various professional associations
- 4% San Diego Workforce Partnership (1 response)
- 0% A local community college (Specify college: \_\_\_\_\_)
- 0% Monster.com
- 0% A one-stop career center (Specify location: \_\_\_\_\_)
- 0% A regional university (Specify university: \_\_\_\_\_)
- 22% Other (Please specify: \_\_\_\_\_) (1 response each)
- 22% Don't know/ Not sure

Generally speaking, how would you rate the **assistance with lay-offs** provided by the service provider, or do you not have an opinion?

**Percentages among Those That Have Used an Outside Agency for Assistance with Lay-Offs (n=23)**

- 52% Excellent
- 13% Good
- 4% Fair
- 4% Poor
- 0% Very poor
- 17% No opinion
- 9% (Don't Read) DK/NA

### Organization and Current Employee Questions

Next, I'd like to ask you a few general questions about your firm and your current employees.

11. How many business locations does your firm have in San Diego County?

- 82% 1 San Diego County location
- 9% 2 San Diego County locations
- 3% 3 San Diego County locations
- 2% 4 San Diego County locations
- 2% 5 to 9 San Diego County locations
- 1% 10 to 40 San Diego County locations

Average # of SD County Locations (n=806) = 1.53

Median # of SD County Locations (n=806) = 1.00

12. How many business locations does your firm have outside of San Diego County?

- 79% No locations outside San Diego County
- 7% 1 location outside San Diego County
- 3% 2 locations outside San Diego County
- 2% 3 locations outside San Diego County
- 1% 4 locations outside San Diego County
- 2% 5 to 9 locations outside San Diego County
- 3% 10 to 49 locations outside San Diego County
- 1% 50 or more locations outside San Diego County
- 1% (Don't Read) Don't know/ Refused

Average # of Locations Outside County (n=796) = 2.43

Median # of Locations Outside County (n=796) = 0.00

### Combined Data: Total Number of Locations

- 67% 1 total location
- 12% 2 total locations
- 5% 3 total locations
- 3% 4 total locations
- 5% 5 to 9 total locations
- 5% 10 to 49 total locations
- 1% 50 or more total locations
- 1% (Don't Read) Don't know/ Refused

Average # of Total Locations (n=796) = 3.90

Median # of Total Locations (n=796) = 1.00

13. Including all full-time and part-time employees, how many **permanent** employees work at your firm location?

n=803

<u>Total # Permanent Employees</u>	<u>Mean</u>	<u>Median</u>
17,449	21.73	15.00

Breakdown (n=806)

4%	1 to 5 permanent employees
5%	6 to 9 permanent employees
62%	10 to 24 permanent employees
22%	25 to 49 permanent employees
6%	50 to 99 permanent employees
1%	100 to 140 permanent employees
0%	(Don't Read) DK/NA

14. If you currently have [TAKE Q13 #] full-time and part-time **permanent** employees at your firm location, how many more or less permanent employees do you expect to have at your location 12 months from now?

38%	More [record # _____]
3%	Less [record # _____]
53%	Same number of permanent employees
7%	(Don't Read) Refused or Don't Know

**Expected Permanent Employment: 12 months**  
**(Calculated by only examining firms with both current and projected data)**

	<u>Current</u>	<u>12 months</u>
n	743	743
Mean	21.51	23.61
Median	15.00	17.00
Total Employees	15,985	17,544
New Employees		1,559
% Growth		9.8%

**With One Outlier Removed (Project to Add 150 Permanent Employees)**

**Expected Permanent Employment: 12 months**  
**(Calculated by only examining firms with both current and projected data)**

	<u>Current</u>	<u>12 months</u>
n	742	742
Mean	21.52	23.42
Median	15.00	17.00
Total Employees	15,971	17,380
New Employees		1,409
% Growth		8.8%

**With Three Outliers Removed (Project to Add 150, 50, and 40 Permanent Employees)**

**Expected Permanent Employment: 12 months**

**(Calculated by only examining firms with both current and projected data)**

	<u>Current</u>	<u>12 months</u>
n	740	740
Mean	21.56	23.34
Median	15.00	17.00
Total Employees	15,951	17,270
New Employees		1,319
% Growth		8.27%

[If amount differs by 10% or more in either direction, ask: ] Just to confirm, you currently have \_\_\_\_ permanent employees and you expect to have \_\_\_\_ (more/less) employees, for a total of \_\_\_\_ permanent employees 12 months from now.

Next, I would like to ask about temporary employees at your organization.

15. Has your firm hired a temporary employee for your location in the last 12 months?

- 25% Yes
- 74% No
- 1% (Don't Read) Don't know/ Not sure

IF Q15= 2 OR 3, SKIP TO Q18

16. Including all full-time and part-time employees, how many **temporary** employees work at your firm location?

**Data among Firms That Have Hired Temporary Employees (n=205)**

<u>Total # Temporary Employees</u>	<u>Mean</u>	<u>Median</u>
700	3.41	1.00

**Percentages among Firms That Have Hired Temporary Employees (n=205)**

**Breakdown (n=205)**

- 40% No current temporary employees
- 22% 1 temporary employee
- 10% 2 temporary employees
- 5% 3 temporary employees
- 5% 4 temporary employees
- 7% 5 to 9 temporary employees
- 6% 10 to 19 temporary employees
- 4% 20 or more temporary employees

17. If you currently have [TAKE Q16 #] full-time and part-time **temporary** employees at your firm location, how many more or less temporary employees do you expect to have at your location 12 months from now?

**Percentages among Firms That Have Hired Temporary Employees (n=205)**

- 29% More [record # \_\_\_\_\_]
- 6% Less [record # \_\_\_\_\_]
- 54% Same number of temporary employees
- 11% (Don't Read) Refused or Don't Know

**Expected Temporary Employment: 12 months**  
**(Calculated by only examining firms with both current and projected data)**

	<u>Current</u>	<u>12 months</u>
n	183	183
Mean	3.46	4.76
Median	1.00	1.00
Total Employees	634	871
New Employees		237
% Growth		37.4%

**With One Outlier Removed (Project to Add 75 Temporary Employees)**  
**Expected Temporary Employment: 12 months**  
**(Calculated by only examining firms with both current and projected data)**

	<u>Current</u>	<u>12 months</u>
n	182	182
Mean	3.35	4.37
Median	1.00	1.00
Total Employees	609	796
New Employees		187
% Growth		30.7%

[If amount differs by 10% or more in either direction, ask: ] Just to confirm, you currently have \_\_\_\_\_ permanent employees and you expect to have \_\_\_\_\_ (more/less) employees, for a total of \_\_\_\_\_ permanent employees 12 months from now.

**Combined Data: Total Employees at Location (Permanent and Temporary)**

n=803

<u>Total # Employees</u>	<u>Mean</u>	<u>Median</u>
18,149	22.60	16.00

Breakdown (n=806)

7%	Less than 10 employees
63%	10 to 24 employees
23%	25 to 49 employees
6%	50 to 99 employees
1%	100 to 150 employees
0%	(Don't Read) DK/NA

Next, I would like to ask about employees with less than a four-year degree at your organization.

18. How many of your current employees, both permanent and temporary, have less than a four-year degree at your location?

(If you are unsure, please provide your best estimate.)

n=717

<u>Total # Less than 4-Yr Degree</u>	<u>Mean</u>	<u>Median</u>
10,405	14.51	11.00

Breakdown (n=806)

4%	0 employees
17%	1 to 5 employees
16%	6 to 9 employees
39%	10 to 24 employees
11%	25 to 49 employees
3%	50 to 99 employees
0%	100 employees
11%	(Don't Read) DK/NA
4%	0 percent of employees
0%	1 to 5 percent of employees
7%	6 to 24 percent of employees
12%	25 to 49 percent of employees
20%	50 to 74 percent of employees
46%	75 to 100 percent of employees
11%	(Don't Read) DK/NA

**Employees with Less than a Four-Year Degree  
 (Calculated by only examining firms with both total and four-year data)**

	<u>Total Employees (Permanent and Temporary) at Location</u>	<u>Employees with Less than Four- Year Degree</u>
n	716	716
Mean	21.86	14.50
Median	15.00	11.00
Total Employees	15,649	10,385
% Less than 4-yr Degree		66.4%

[Build check so Q18 amount is not more than Q13 + Q16]

[SKIP TO Q22 IF NO EMPLOYEES WITH LESS THAN A FOUR-YEAR DEGREE:  
 Q18 = 0 OR 9999]

**Question 19, 20, and 21 Only Asked of Firms that Have Employees with Less than a Four-Year Degree (n=686)**

19. What is your level of difficulty finding qualified applicants with less than a four-year degree?

**Percentages among Firms that Have Employees with Less than a Four-Year Degree (n=686)**

- 67% No difficulty
- 23% Some difficulty
- 7% Great difficulty
- 3% (Don't Read) Don't know

[SKIP TO Q22 IF NO DIFFICULTY: Q19 = 1 OR 4)

20. Among your occupations that require less than a four-year degree, in which ones do you have the greatest difficulty finding qualified applicants?

**Percentages among Firms that Have Employees with Less than a Four-Year Degree and Have Some or Great Difficulty Finding Qualified Applicants (n=204)**

14%	Machine operators/ drivers
12%	Customer service/ receptionist
11%	Skilled technicians
10%	Sales and wait staff
10%	Managers/ administrators
7%	General worker/ housekeeping
6%	Maintenance
4%	Kitchen staff
4%	Programmers
3%	Administrative assistants
2%	Inspectors and collectors
2%	Nurses and EMTs
2%	Instructors
2%	Other (Specify: _____)
11%	Don't know/ Not sure

21. What do you think are the main reasons you have difficulty finding qualified applicants with less than a four-year degree for the occupations you just identified?

**Percentages among Firms that Have Employees with Less than a Four-Year Degree and Have Some or Great Difficulty Finding Qualified Applicants (n=204)**

30%	Lack of skills or experience
18%	Poor work habits
11%	Low wages/ don't pay enough
7%	Lack of viable workforce
7%	No interest in profession
4%	Job is too physical
3%	Our location
2%	Can't pass our tests/ screening
1%	Not having green cards
8%	Other (Specify: _____)
9%	Don't know/ Not sure

**Workforce Challenges**

22. Now, I'm going to read a list of issues facing the region's workforce in the coming years. Please tell me how much difficulty your organization faces in addressing each workforce need.

Here's the (first/next) one \_\_\_\_\_ (READ ITEM): Please tell me whether your organization has no difficulty, some difficulty, or great difficulty in dealing with this issue.

RANDOMIZE

	<u>No difficulty</u>	<u>Some difficulty</u>	<u>Great difficulty</u>	<u>(Don't Read) Don't Know</u>
A. Replacing retired workers with qualified employees .....	65%	16%	4%	15%
B. Providing training programs so current employees are productive and stay up-to date on changing technology and industry requirements .....	73%	23%	3%	1%
C. Providing training opportunities so current employees are able to advance within the organization.....	73%	22%	2%	3%
D. Recruiting entry-level employees with appropriate training and education .....	60%	32%	6%	2%
E. Recruiting non-entry level employees with adequate skills and industry experience .....	54%	35%	8%	3%
F. <b>Retaining</b> valuable employees who want to purchase housing within a reasonable distance from work .....	51%	24%	11%	14%
G. <b>Retaining</b> valuable employees who could move up within the organization .....	71%	24%	3%	2%

23. Thinking in general about recent hires at your organization, which of the following skills would you say that recent hires tend to have the most trouble with? (ALLOW MULTIPLE RESPONSES)

(If Needed: For this question, we are interested in your general sense about skill problems or shortages for recent hires across occupations at your organization)

- 34% Interpersonal communication skills
- 32% Creative problem-solving skills
- 29% Ability to work independently
- 27% Technical writing skills
- 26% Technical competence specific to the position
- 19% Ability to work with different groups or departments
- 3% Work ethic
- 2% Language barriers
- 2% Trouble learning our system
- 1% Timeliness/ punctuality
- 1% Lack of experience
- 1% Not applicable - no recent hires
- 3% No deficiencies
- 1% Other (Please specify\_\_\_\_\_)
- 6% (Don't Read) Depends on occupation
- 17% (Don't Read) Don't know

24. Next, I'd like to ask you about employee development practices at your business location. As I read each of the following employee development practices, please indicate whether your business uses each practice.

RANDOMIZE	<u>Yes</u>	<u>No</u>	<u>(DON'T READ DK/NA)</u>
A. Formal on-the-job training.....	84%	16%	0%
B. In-house classroom training provided by contractors.....	25%	74%	1%
C. Career advancement and promotion planning for current employees .....	44%	54%	3%
D. Employer-paid outside training .....	46%	54%	0%
E. Internships or apprenticeship programs.....	31%	69%	1%
F. Tuition assistance or reimbursement at a college or university .....	19%	80%	1%

25. Are you interested in receiving future information and communications from the San Diego Workforce Partnership?

- 43% Yes
- 54% No
- 4% (Don't Read) DK/NA

Thank you for completing the survey. Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.

First and Last Name of Respondent\_\_\_\_\_

Position of Respondent\_\_\_\_\_

Email of Respondent\_\_\_\_\_

Phone of Respondent\_\_\_\_\_ (pull in from sample to verify)

Business Name\_\_\_\_\_ (pull in from sample to verify)

Address \_\_\_\_\_(pull in from sample to verify)

Date of Interview \_\_\_\_\_

**Those are all the survey questions.  
Thank you very much for your time.**

Survey Type:

99%	Phone
1%	Web

Region:

13%	East
45%	North
34%	Metro
8%	South
0%	No data

Industry BY SIC OR NAICS:

8%	Construction
7%	Manufacturing
11%	Transportation and Trade
12%	Retail
7%	Finance, Insurance, and Real Estate
8%	Healthcare and Education
20%	Professional and Business Services
21%	Hospitality and Leisure
4%	Other
0%	No data

Annual Revenue:

6%	Less than \$500,000
13%	\$500,000 - 1 Million
30%	\$1 - 2.5 Million
25%	\$2.5 - 5 Million
15%	\$5 - 10 Million
7%	\$10 - 20 Million
2%	\$20 - 50 Million
0%	\$50 - 100 Million
3%	No data