Sacramento Metro Chamber

Graduate School of Management. UC Davis.
DEAR READERS

In 2021, as we re-enter society, we see a wave of churn in the workforce. The pandemic lockdown has upturned the economic environment. Migration has changed the employment landscape. Each region has reacted differently. As the economy rebounds, what factors will incentivize a skilled resident-base to stay and succeed in the region?

To that end, we launched an anonymous survey within our communities. We studied the importance of attributes, expectations and satisfaction gaps of different workforce segments. This report is the output of that study.

We welcome this opportunity to make our vibrant workforce successful, allowing for fulfilling careers, businesses and lives. Our journey begins with your workplace, your residence, your home.

Be well, be safe and take care.

Sincerely,

Divya, Connor, Patrick, Sean, Lakhjit, Kelly
UC DAVIS GRADUATE SCHOOL OF MANAGEMENT
the demographics
The Sacramento Metro Chamber launched a workforce survey to understand the drivers of satisfaction and retention among Sacramento residents.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Cost of Living</td>
<td>Property Prices, Rental Market, Utilities, Expenses.</td>
</tr>
<tr>
<td>Diversity</td>
<td>Inclusion, Tolerance, Culture, Belonging.</td>
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<tr>
<td>Education</td>
<td>School Districts, Daycare, Colleges, School Choice.</td>
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<tr>
<td>Government</td>
<td>Public Policy, Covid Response, Sustainability, Taxation, Access</td>
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<tr>
<td>Infrastructure</td>
<td>Public Transport, High-Speed Internet, Commute Time, Traffic, Airport Access.</td>
</tr>
<tr>
<td>Social and Leisure</td>
<td>Breweries, Travel, Restaurants, Nightlife, Sports, Alternative Recreation.</td>
</tr>
<tr>
<td>Surroundings</td>
<td>Weather, Geography, Parks, Walkability, Waterfront, Fields.</td>
</tr>
</tbody>
</table>
The demographics of the 240 people that responded were fairly split between employees and managers, and heavily skewed toward full time employment status.

**THE WORKFORCE**

- **48% MANAGERS**
- **52% EMPLOYEES**

**THE EMPLOYMENT STATUS**

- **EMPLOYED FULL-TIME**: 84%
- **NOT EMPLOYED, LOOKING**: 6%
- **EMPLOYED PART-TIME**: 4%
- **SELF EMPLOYED**: 4%

**THE LIFE STAGES**

- **18-24 YRS.**: 7%
- **25-40 YRS.**: 57%
- **41-56 YRS.**: 30%
- **57-65 YRS.**: 6%

**THE CAREER STAGES**

- **LOW-LEVEL**: 25%
- **MID-LEVEL**: 33%
- **TOP-LEVEL**: 42%

**THE COMPANY SENIORITY**

- **0+ YRS.**: 28%
- **2+ YRS.**: 33%
- **5+ YRS.**: 21%
- **10+ YRS.**: 18%
Within the 48% managers and 52% employees, there was a varying spread of life stage age groups, career stage levels and company seniority.

**the demographics**

**Manager Life Stages**
- Low-Level: 51%
- Mid-Level: 40%
- Top-Level: 9%

**Manager Career Stages**
- Low-Level: 39%
- Mid-Level: 42%
- Top-Level: 19%

**Manager Company Seniority**
- 0+ Yrs.: 22%
- 2+ Yrs.: 29%
- 5+ Yrs.: 27%
- 10+ Yrs.: 24%

**Employee Life Stages**
- Low-Level: 67%
- Mid-Level: 21%
- Top-Level: 9%

**Employee Career Stages**
- Low-Level: 11%
- Mid-Level: 47%
- Top-Level: 42%

**Employee Company Seniority**
- 0+ Yrs.: 34%
- 2+ Yrs.: 38%
- 5+ Yrs.: 16%
- 10+ Yrs.: 12%
Within the survey respondents, there was a mix of industries spread across the metropolitan region with a high percentage of whites and females.

**THE INDUSTRY**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>EDUCATION</td>
<td>15%</td>
</tr>
<tr>
<td>NON-PROFIT</td>
<td>13%</td>
</tr>
<tr>
<td>HEALTH SERVICES</td>
<td>9%</td>
</tr>
<tr>
<td>GOVERNMENT</td>
<td>8%</td>
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<tr>
<td>TECHNOLOGY</td>
<td>8%</td>
</tr>
<tr>
<td>COMMUNICATIONS</td>
<td>7%</td>
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<tr>
<td>CONSULTING</td>
<td>6%</td>
</tr>
<tr>
<td>PROFESSIONAL SERVICES</td>
<td>5%</td>
</tr>
<tr>
<td>ENVIRONMENT</td>
<td>5%</td>
</tr>
<tr>
<td>FINANCIAL SERVICES</td>
<td>4%</td>
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<tr>
<td>CONSTRUCTION</td>
<td>4%</td>
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<tr>
<td>LEGAL</td>
<td>3%</td>
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<tr>
<td>INSURANCE</td>
<td>3%</td>
</tr>
<tr>
<td>RETAIL</td>
<td>2%</td>
</tr>
<tr>
<td>MANUFACTURING</td>
<td>2%</td>
</tr>
<tr>
<td>REAL ESTATE</td>
<td>2%</td>
</tr>
<tr>
<td>AGRIBUSINESS</td>
<td>1%</td>
</tr>
<tr>
<td>HOSPITALITY</td>
<td>1%</td>
</tr>
<tr>
<td>DISTRIBUTION</td>
<td>1%</td>
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</tbody>
</table>

**THE REGION**

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>SACRAMENTO</td>
<td>54%</td>
</tr>
<tr>
<td>OTHER</td>
<td>21%</td>
</tr>
<tr>
<td>ROSEVILLE</td>
<td>7%</td>
</tr>
<tr>
<td>FOLSOM</td>
<td>6%</td>
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<tr>
<td>DAVIS</td>
<td>5%</td>
</tr>
<tr>
<td>ELK GROVE</td>
<td>4%</td>
</tr>
<tr>
<td>WEST SACRAMENTO</td>
<td>3%</td>
</tr>
</tbody>
</table>

**THE DIVERSITY MIX**

- 69% WHITE
- 21% HISPANIC / LATINX
- 10% ASIAN
- 8% OTHER
- 4% BLACK

**THE GENDER MIX**

- 68% FEMALES
- 30% MALES
the headlines
Two major findings emerged from the data set. 40% of the workforce may relocate out of their cities. 57% of those, may leave Greater Sacramento.

the headlines

40% of the workforce is considering moving out of their cities.

Of those, 57% may leave Greater Sacramento altogether.
the workforce
Study respondents were the most satisfied by the social and leisure opportunities offered by Sacramento and the least satisfied by safety factors.

**the workforce**

Social and leisure was rated the best.

Surroundings and education were top-rated.

Business environment, infrastructure and cost of living rated below average.

Safety was rated the worst.
However, this is not the full picture.

**generalization** of the workforce hides important nuances.

**segmentation** will help us better understand the gap.

**workforce trends** studied were generations, careers, tenure and regions.
Segmentation of the data reveals ...

**zoomers**
are zooming out of their remote location.

**top-brass**
is taking their business elsewhere.

**regions**
desire more strengths, than fear weaknesses.
the life stage
the life stage

**Zoomers** are highly satisfied yet plan to leave.

**Millennials** are generally less satisfied yet stay.

As the workforce gets older, their retention strongly correlates to their satisfaction.

**Boomers** have the highest risk of leaving.

By age, Zoomers and Boomers are most at risk of leaving, with roughly 30% of the younger crowd and 50% of seniors saying they may leave Greater Sacramento.
the life stage

When looking at satisfaction levels by age cohort, the survey revealed Zoomers and Millennials were the least satisfied with the cost of living, while older respondents ranked safety and business environment lower.

Cost of living is most dissatisfactory for zoomers and millennials, improving over age.

As the 25-40 group grows into 41-56, their satisfaction improves. Infrastructure rates low.

Business environment and safety were least satisfactory for boomers.
cost of living
is a major factor for the younger generation to leave.

business environment
is significant for boomers and millennials.

zoomer focus
for incoming workforce, is required to close the gap.
the career stage
For managers, retention and satisfaction are well correlated. 20% of new managers and 30% of top management may leave Greater Sacramento.

the career stage

For managers, higher the satisfaction, the lower their need to leave the region.

Low-level managers with less than 5 years experience, are the least satisfied. Mid-level managers are the most satisfied. Top management with more than 10 years experience, have the highest risk of leaving.
For employees, retention and satisfaction are consistent regardless of experience. 18% of non-managers may leave Greater Sacramento.

the career stage

Employees (non-managers) have a steady retention and dissatisfaction rate.

Employees’ dissatisfaction and plan to leave, is within 1% that of low-level managers.
Amongst managers, business environment is less satisfactory for top-brass. New managers are concerned more about cost of living.

Cost of living and infrastructure rated low amongst low-level managers, a wide gap between new and senior managers.

Top management rated business environment as the least satisfying.

Safety was a major concern for managers.
Amongst employees, cost of living is less satisfactory overall. As the workforce gets more experienced, business environment becomes an issue.

the career stage

Cost of living is a big concern for employees. Employees with 5+ years experience are highly dissatisfied with the business environment. Employees with less than 5 years experience are more concerned about safety.
business environment
is a deciding factor for workforce with 5+ years career.

cost of living
is a major concern for employees and new managers.

opportunity focus
for senior leadership, is required to close the gap.

When segmented by career stages ...
the seniority
Based on company seniority, beyond 2+ years service, the longer the tenure, the higher the possibility of leaving Greater Sacramento.

**the seniority**

**New hires** have a greater flexibility to leave. After 2+ years service, the workforce rates leaving as a higher possibility with tenure.

**Senior leaders** with more than 10+ years service, have the greatest risk of leaving.

Satisfaction correlates with retention only during the first few years of service.
Based on survey responses, as time in company increases, need for better infrastructure increases. Cost of living is a trade-off factor for new hires.

**the seniority**

**Cost of living** is significant for short-tenured workforce, as they build their seniority.

**Infrastructure** becomes significantly more important as tenure increases.
When segmented by company seniority ...

infrastructure
concerns increase as daily routine sets in.

cost of living
is a driving factor for new hires to leave the region.

benefits’ focus
per company, is required to close the gap.
the region
When examining satisfaction levels based on where the respondents live, most areas showed similar satisfaction levels (with Roseville residents slightly more satisfied), however in terms of likelihood of leaving, the top at risk regions were Folsom, Elk Grove and Davis.

**the region**

*Roseville* residents rated theirs the most satisfying city in the region.

*West Sacramento* residents preferred to stay in their region, despite lowest satisfaction.

*Folsom* residents indicate a concerning retention trend.
Roseville residents rated their city as having the best surroundings, infrastructure, affordable cost of living and a good business environment.

Residents rated this city as the best in many attributes, above average in all.

**Surroundings, social leisure and infrastructure** were rated the highest.

**Business environment** and **Cost of living** were rated conducive by the workforce.
Folsom residents rated their city as the most satisfactory in safety and cost of living, average in business environment, and least in government.

Residents rated this city as the best in many attributes, with the overall highest satisfaction. Safety and Cost of living were ranked the highest by the resident workforce. Business environment was rated average. Government was rated the least.
Davis respondents rated their city as the best for education and government, below average for business environment, and least for cost of living.

Residents rated this city as the best in education, government and diversity. Business environment, surroundings, cost of living and social leisure were rated amongst the least.
Elk Grove residents rated their city as having the least satisfying business environment. Cost of living and safety rated well below average.

**ELK GROVE**

Most attributes were rated as below average. **Infrastructure** and **surroundings** are meet average expectations of residents. **Safety** and **Cost of living** were in the low percentile for satisfaction. **Business environment** was rated the least.
Sacramento residents rated their city as having below average infrastructure, cost of living and business environment. Diversity was rated the least.

Residents rated this city as average for government, social and leisure. Infrastructure, business environment and cost of living were rated below average. Diversity were rated the least satisfactory.
West Sacramento residents rated theirs the most satisfying business environment. Infrastructure and surroundings were rated the least satisfying.

**West Sacramento**

Residents rated their city as the best for one attribute, and the worst for four.

**Business environment** was rated the best.

**Safety, Infrastructure, Surroundings** and **Education** were rated lowest by residents.

**Cost of living** was rated as high satisfaction.
unique strengths
of a region, make people want to stay.

business environment
after uniqueness, is crucial to residents.

personalized focus
per region, is required to close the gap.
In conclusion,

**business growth**

is required to keep experience in the region.

**cost of living**

competes with the remote workplace.

**unique benefits**

for residents, is an offer they can’t refuse.
THANK YOU.
The workforce survey queried respondents on employment status, career stage, industry, experience, tenure, region and life stages amongst others.

**the survey**

Which of the following best describes your employment status? (Select one)
- Employed, working full-time
- Employed, working part-time
- Self-employed
- Not employed, looking for work
- Not employed, NOT looking for work

What career stage are you in? (Select all that apply)
- Just out of school / Getting started
- Individual contributor, no management duties
- Long time technical expert / professional, no management duties
- First time manager, just got promoted in the last 6 months
- Manager for a while (up to 5 years)
- Manager for more than 5 years
- Senior management / executive
- Freelancer / Contractor
- Student
- Retired

How many people do you supervise / manage? (Enter a number, 0 if none)

What industry do you currently work in? (Select one)
- Agribusiness
- Advertising / Communications / Public relations
- Business consulting / Lobbying
- Construction
- Educational
- Financial services and activities
- Government – federal, state and local
- Health services
- Information and technology
- Land use, development and real estate
- Leisure / Hospitality / Restaurants
- Legal
- Manufacturing
- Natural resources / Environmental services
- Non-profit
- Professional Services
- Transportation / Distribution / Logistics
- Retail
- Other Industry (Enter text below)

How many years have you worked for your current company? (Enter a number)

How many companies in the Greater Sacramento region have you worked for? (Enter a number)

Which city do you live in? (Enter text)

Which age group do you fall in? (Select one)
- 16-24
- 25-40
- 41-56
- 57-64
- 65+

Are you planning to leave your current city in the next 1-3 years? (Select one)
- Yes / maybe
- No

If Yes / maybe, which city are you thinking of moving to? (Enter text)
The workforce survey included questions on importance, satisfaction and rank of attributes. The 16-question, anonymous survey closed in 3 weeks.

### the survey

**How important are the following criteria to you? (Choose one through five)**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>1 (Not important)</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 (Very important)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of Living (property prices, rental market, utilities, expenses)</td>
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<tr>
<td>Safety (crime, homelessness, sanitation, emergency services, natural disasters)</td>
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<tr>
<td>Business Environment (pay, career growth, benefits, regulations, work-life balance, desired industry)</td>
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**How well does you region satisfy your expectation of the following? (Choose one through five).**

Same options as importance. 1 (Does not satisfy), 5 (Exceeds expectations).

**Rank the following aspects based on their importance to you. (Move to order).**

Same options as importance in random groups of three, asked three times.

**Are you of Hispanic / Latino / Spanish origin? (Select one)**

- Yes
- No
- Prefer not to say

**How would you best describe yourself? (Select all that apply)**

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Not listed
- Prefer not to say

**To which gender identity do you most identify? Select one.**

- Female
- Male
- Gender Variant / Non-conforming
- Prefer to self-describe
- Prefer not to say
THANK YOU.