

SANTA BARBARA SOUTH COAST
CHAMBER OF COMMERCE

From Goleta to Carpinteria

Roadmap to Recovery

PHASE II
October 2021



Chapter 1: Overview

Overview

The COVID-19 pandemic has caused the largest public health crises and economic devastation to the local economy. The Chamber is launching Phase II of our Roadmap to Recovery. Phase I of the Roadmap to Recovery was released in February and provided a summary of challenges and set a course for goals, tactics, and milestones to get businesses reopened safely.

Roadmap to Recovery Phase II addresses long-term recovery strategies, different emerging issues and additional challenges businesses are now facing since Santa Barbara County and the State of California are reopening. We are focused on providing information and resources for business reopening and recovery in our communities.

Although we have a positive outlook about improvements in the economy, we remain cautiously optimistic, as it is going to take time to completely recover our local economy and jobs.

Businesses Operating Safely

After 18 months of learning best practices, our businesses are prepared to stay open and operate safely during the on-going Pandemic. The COVID Safety 5-Step Method outlined in our Roadmap to Recovery Phase I emphasizes the five simple steps our business community can take as we continue to navigate the reopening of our economy: mask-wearing, sanitizing, proper distancing, plexiglass, and ventilation. Businesses are also more prepared to support their employees through hybrid work accommodations.

The Chamber will continue to champion COVID-19 vaccines, employees getting their flu shot, increased sanitizing, and employers embracing the ability to work from home to keep employees safe.

Vaccinations

Vaccinating our community is the quickest way out of the pandemic. As of September 25, 2021, over 6.1 Billion vaccines had been administered world-wide. In California, 50.3 million doses had been given and in Santa Barbara County 536,960 doses had been administered. Of the eligible population, ages 12+, in Santa Barbara County 68% were fully vaccinated.

Employers emphasizing the importance of vaccines will be critical to our full recovery.

Recovery Reimagined

It is the Chamber's mission, passion, and within our expertise to map a course to help both large and small businesses to not only survive this crisis, but flourish in our South Coast communities, from Goleta to Carpinteria.

For eighteen months, The Covid-19 Pandemic has brought massive economic loss and will continue to have long term financial, health, emotional, and safety impacts to the Santa Barbara County business community and State of California.

The Chamber advocates for our members with our local, regional, state, and federal government elected officials with efficiency and integrity in ongoing efforts to strengthen the voice of our business community.



Chapter 2: Stakeholder Meetings

The Roadmap to Recovery is the culmination of months of industry-specific focus groups, working with government leaders, public health officials, residents, parents, and the business community. Phase I was compiled by gathering feedback and data from hundreds of our members. Industry sectors included: Agribusiness, Arts/Culture, Business/Government/Health, Childcare, Education, Healthcare/Mental Health, Lodging and Hospitality/Tourism, Manufacturing/Technology, Non-Profits, Philanthropy, Restaurants/Wineries/Breweries, and Retail. The Chamber's Roadmap included the culmination of our research, which recommended guidance such as the COVID Safety 5-Step Method, in addition to creating milestones, timelines, and metrics that guided decisions to support a safe and functioning economy.

Phase II included stakeholder meetings with 105 industry-specific focus group participants in which experts and members shared their insights into what their individual sectors needed to reopen their business in a careful, considerate, and safe way. We compiled extensive details about their adaptations, biggest challenges, financial obstacles, recovery efforts, and safety protocols as they continued to reopen.

Challenges and Silver Linings

Our stakeholders were uniformly passionate about the barriers they faced in reopening. The most prominent challenges include the labor shortage, supply chain disruption, confusion over State and local guidelines, conflicting government regulations, and lack of clear and concise rules around travel, including bus travel, cruise ships, and air travel.

However, there have been silver linings. Some of the changes industries made will be longstanding. Our stakeholders reported some plans to keep in place, remote work and/or a hybrid version of remote and in-office work; a need to keep options for telehealth, continued use of zoom meetings for some groups and some topics, the option of remote school in addition to in-person, higher education accessibility to a wide variety of speakers and lecturers, increased outdoor dining, increases in delivery services, and continued availability of curbside pickup.

The tourism and hospitality industry experienced the most dramatic economic impact during the height of the pandemic and the shut downs. Our county's economy relies heavily on travel, lodging, restaurants, and attractions and activities - so the negative impact was obvious and widespread.

One silver lining is a renewed appreciation for this industry cluster and a second is that due to a long-standing reputation for excellence and safety, combined with a strategic early entry into destination marketing, we have seen steady growth, skyrocketing revenues, and a diligence to safety methods that have paid off.

However, the high highs have brought with it low lows - as this industry is highly impacted by the labor shortage and supply chain issues. Many restaurants and hotels cannot keep up with returning demand due to an inability to hire enough workers. And all sectors of the hospitality industry are affected by supply chain issues - everything from sheets and towels to forks and knives. Perhaps the most dramatic impact has been the spike in homelessness and safety/crime issues with transients affecting the tourism industry at every level. The visual blight from encampments, personal safety of customers and personnel, downtown issues with people living on the streets, fires started in camps, and theft, have made the effects of homelessness the largest threat to our tourism economy. On top of that, the lodging industry has been called upon to help as never before, even providing temporary shelter in hotel rooms.

Chapter 3: Beyond June 15th

The top challenges to recovery in our economy look different for the next 12-months than they did in the last 12 months. The following areas are the biggest concerns and barriers to a full recovery:

1. Labor Shortage

Across all industry sectors we heard that businesses were suffering from a severe labor shortage. High costs and low supply of housing and childcare continue to hinder the ability to attract qualified workers and support a faster recovery.

Retaining and attracting new employees with the high cost of living on the South Coast has led many employers to rethink their hiring processes, and are now offering new employee incentives, retention bonuses, allowing additional remote workers, and offering flexible hours.

We see five main reasons for the labor shortage:

- Lack of students on campus at local universities and college campuses. In the past, students have filled many part-time jobs in the service and hospitality sector
- Uncertainty around childcare. In looking toward school reopening and the resumption of after-school activities, many parents are waiting to make permanent plans to return to the workforce
- Federal and State financial aid and unemployment benefits. Although this may play a smaller role here in Southern California, it is a factor to be considered
- Career changes – many workers were forced to make career changes due to shutdowns in restaurants, hotels, events, and other hospitality-related industries, and some of them will not return
- Health and Safety – workers with fear of COVID, or who have underlying conditions that make them vulnerable to COVID may be waiting for more certainty about their health and safety at the workplace

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2. Return of the Workforce

Across all industry sectors we heard employers say that the June 15th reopening date was not a hard date for “business as usual”. Three months later, many of our County largest employers have not reopened their offices. The need for improved infrastructure and opportunities for remote work and satellite offices is ever increasing. A cautious but measured approach will be taken into consideration as businesses create their reopening timelines for their offices and office workers. Efforts to create a safe, normal, equitable, and comfortable work environment will be ongoing through the fall and winter.

Employers report the need for more policies in place for remote work. Guidance is needed for Cybersecurity as employees were instantaneously required to work from home with limited technology support and security systems in place. Productivity is difficult to measure, and employee motivation is more challenging when working from home, especially when children are remote learning in the same household.

The off-again, on-again mask wearing, and social distancing mandates have been confusing and the CDC Guidelines and Cal/OSHA have not been in step, making it increasingly difficult for businesses to comply.

3. Childcare/Schools/Higher Education

This past 18 months has accentuated how childcare plays a vital role in our infrastructure and due to the pandemic, the already fragile childcare system has been challenged. Children experienced learning loss and trauma and needed appropriate services, screenings, and support. Parents struggled to work while caring for their children during the pandemic and needed to know that their children were in a safe, stable, high-quality, and equitable environment so they could work. For our businesses and economy to recover, schools and childcare must be available.

Transportation for students for K-12 school, camps, and after-school activities needs to be readily available. Affordable infant care is needed locally so parents can go back to work. After school programming for the gap time when students complete school at 2:30 and parents work until 5:30 PM is needed.

Getting teachers and administrators vaccinated is a priority to bring employees and students back on campus. Vaccinations are now easily available to those who choose to be vaccinated as mobile vaccination sites are now available to schools, clubs and business organizations. Cal/Osha requirements about quarantining after exposure in the workplace needs further refinement. Regulations need to be specific about sending COVID-19 exposed/sick children to school so parents can work.

After school funding is going to be available, however there needs to be discretion between large and small districts with the resources going to the communities most in need. ARPA funding needs to be distributed in a timely way so daycare facilities and schools can recruit employees.

The future for higher education may include hybrid models in some instances with both remote learning and in-person class options. Visa delays and challenges for international faculty and students remain a concern for colleges.





4. Supply Chain

Supply chains across many industries have been dramatically impacted due to the pandemic. The cost of materials has increased as demand has increased and production has been slowed down. Lumber materials were up 400% from previous years. Lead time on materials has also increased from usually a few weeks to now months. Cleaning supplies have also been difficult to locate and keep stocked. There is anticipation that the supply chain will take time to recover and that there is still possibility of shortages until it evens out. As we near the holiday season, businesses large and small are concerned they won't have enough stock to supply their busiest time of year.

Auto Industry: There is a significant shortage of rental cars and cars for sale that is hampering recovery. Some predict the shortage will end this fall. Supply chain issues are affecting manufacturing of a variety of automobiles. Various factors slowed down the manufacturing of a crucial chip needed for many car manufacturers. Inventory of this chip is projected to pick up mid-fall. By winter 2021 we hope to see vehicle sales back to normal.

Construction: Supply chain issues and shortages have contributed to a variety of slowdowns across the board in the construction industry. Lumber materials were up 400% over the last six months, experiencing a slight drop in recent weeks. Hardware is very difficult to get and is taking 2-3 weeks longer to receive for most local distributors. Doors and windows usually take 2-3 weeks and are now taking 3-4 months. Materials such as plastic and metals that come from China are sitting in storage containers in China and in the ocean. There is a shortage of laborers to unload containers

In addition to supplies, the cost of materials at all levels have seen significant increases. Our hardware stores reported the cost of paint increasing 4 times in the last 6 months. Our local printers have reported the cost of paper projected to increase 10% next month.

Industries across the board report challenges with supply chain with little certainty of when these challenges may go away.

5. Health Care Providers and Workforce Mental Health

Health Care providers are currently able to offer all elective surgeries and will remain doing so as long as COVID-19 levels in the community remain at low levels. Visitors are being allowed at most medical facilities with statewide safety screening in place. Most health care providers are in their office offering in person appointments, however, telehealth may still be used and encouraged when appropriate and convenient.

While vaccinations are now readily available to all age groups and mobile units are being utilized, vaccination hesitancy is widespread. Businesses are focusing on vaccination education in efforts to get employees, students, and travelers engaged.

The Chamber is a champion for vaccinations and encourages our community members to get vaccinated. Nearing the end of September, Santa Barbara County has administered 536,960 doses. Of the eligible population, ages 12+, in Santa Barbara County 68% were fully vaccinated. We hope to reach a county-wide rate of at least 75% by October 2021.

Workforce Mental Health

With COVID-19 has come a deeper awareness of the importance of Mental Health and Wellness. Employers have been made aware of many of the challenges their employees face professionally and personally. Many employees have reported feeling burned out and exhausted. Local companies have stepped up to provide better access to resources, counseling, and mental health days for their employees. Overall, it seems employers are aware of these issues and working to provide solutions and connect with their employees better. The challenge many parents faced when providing homeschooling and childcare while also maintaining their full-time jobs, led to a considerable increase in stress for workers. The need for schools and after school programming to be back is detailed under our Childcare and Education section.





6. ABC Licenses/Parklets/Sidewalk Dining

On June 4th, the ABC released a decision to keep the current regulations regarding outdoor service through the end of the year. This regulation changed to accommodate COVID-19 restrictions but proved to be very beneficial to customers and a very manageable process for businesses. Parklets were formed in Carpinteria and Santa Barbara and have proved to be an innovative and successful way to temporarily expand a business' operating space on a public street. In Goleta, the shopping plazas have extended sidewalk dining.

The City of Carpinteria has extended the period until December 31st. The City will review in January, 2022.

The City of Goleta has expanded sidewalk dining for Camino Real Marketplace and Calle Real.

The City of Santa Barbara's parklet program on State Street has updated guidelines to provide guidance for the Interim Period of outdoor operations. This Interim Period is intended to continue until the City develops permanent regulations and design for outdoor operations. Before any new construction may commence, the business must submit the proposed design showing dimensions and materials for City approval.

Starting on Friday, July 9 the City of Santa Barbara changed regulations regarding outdoor dining on sidewalks. Since May 2020, under the Emergency Economic Recovery Ordinance, the City of Santa Barbara has allowed businesses to use the adjacent city sidewalks for outdoor dining and outdoor business areas. In recognition that businesses are able to operate at full capacity and the need to provide accessible path of travel, the city reverted some regulations to how businesses can use sidewalks for outdoor dining.

Businesses are still allowed to operate outdoors on private property, on parklets (extension of the sidewalk into an on-street parking space) and on State Street until March 8, 2022.

The emergency ordinance term allowing outdoor business activities has been extended from March 8, 2021 until March 8, 2022 as the local emergency due to COVID-19 continues. However, the City is currently considering extending this to 2023.

7. State and Local Fiscal Recovery Funds

To support the immediate pandemic response, bring back jobs, and lay the groundwork for a strong and equitable recovery, The American Rescue Plan Act (ARPA) 2021 established the coronavirus State and Local Fiscal Recovery

Funds, designed to deliver \$350 billion to state, local, territorial, and Tribal governments to bolster their response to the COVID-19 emergency and its economic impacts. The county of Santa Barbara will receive a total of \$86.6 million from ARPA that must be spent by December 2024. Half of the money will be available for fiscal year 2021-22, and the other half in 2022-23.

The U.S. Department of the Treasury asserts that the Coronavirus State and Local Fiscal Recovery Funds will provide a substantial infusion of resources to help turn the tide on the pandemic, address its economic fallout, and lay the foundation for a strong and equitable recovery. Funding objectives include supporting urgent COVID-19 response efforts to decrease spread of virus and bring pandemic under control; replacing lost public sector revenue to strengthen support for vital public services and help retain jobs; supporting immediate economic stabilization for households and businesses; addressing systemic public health and economic challenges that have contributed to the unequal impact of the pandemic.

Support Public Health Response, including services to mitigate the spread including vaccination, medical expenses, testing, contact tracing, quarantine costs, capacity enhancements and related activities; Behavioral healthcare services, examples include mental health or substance misuse treatment, crisis interventions and related services; Payroll and covered benefits for public health, healthcare, human services, public safety staff.

Locally, support for child-care improvements, support to mental health agency providers and programs addressing homelessness are top priority.

ARPA funds are supposed to be used to support negative economic impacts. Locally, economic development programs that incentivize entrepreneurship, filling downtown vacancies, offer matching grants for business improvements, workforce incentive programs and restaurant relief are encouraged.

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8. Retail, Tourism and Visitor Services

While some businesses have permanently closed during the pandemic, there continues to be growth in the small business and entrepreneurial industries. Restaurants are busy and want to increase their hours and seating capacity, however the labor shortage is a critical factor.

The Santa Barbara South Coast tourism, travel and hospitality sectors will take 12- 18 months to recover, however the hospitality industry is actively incentivizing domestic and international travelers to return.

Public health and safety related to homelessness and transients is jeopardizing our tourism industry. The homeless in public places, encampments, aggressive behavior, theft, fire incidents, substance abuse, mental health, and changes in criminal laws are all contributing factors facing the local community and visitors alike.

9. Broadband

The pandemic has underscored the integral role the internet plays in our day to day lives – at home, work, and school. With ample federal and state funding available, it is critical that public funding be dedicated to connecting unserved communities, supporting programs that remove barriers to adoption including affordability and digital literacy, and streamlining permitting processes to support wired and wireless broadband deployment, innovation, and competition. Successfully bridging the digital divide will take a collaborative approach that leverages the ongoing and significant private sector investment and expertise while focusing government investment in communities where network infrastructure does not exist, avoiding overbuilding where it does, and modernizing our digital safety net to help low income families adopt and afford internet service.





Chapter 4: Data & Metrics

The Chamber will continue to monitor a variety of economic indicators to measure our growth or decline in key areas.

Unemployment

Unemployment rates continue to improve on the South Coast. As reported in Roadmap to Recovery Phase 1, initial unemployment in Santa Barbara County jumped to 13.7% when our area first locked down. Over the last year, unemployment has continued to fluctuate. Unemployment in Santa Barbara County was 5.8 percent in July 2021, down from a revised 5.9 percent in June 2021, and below the year-ago estimate of 9.6 percent.

On September 2nd, UC Santa Barbara Economic Forecast reported that there are more job openings than the number of unemployed people nationwide. The numbers of vacant jobs in the leisure and hospitality and retail industries are higher than any other time in the history of the data, which goes back to December 2000.

Commercial Real Estate

The economic impact of the COVID-19 pandemic was still evident in the South Coast commercial real estate market in Q1, with virtually all indicators diminished compared to pre-pandemic levels. However, as the spring progresses, our brokers report a noticeable growth in activity and are cautiously optimistic that Q1 will prove to be the last stagnant quarter of the current cycle. Here are some summary points on Q1:

- Transaction value decreased 42% for sales and 30% for lease consideration, compared to Q1 5-year averages.
- Off-market sales and purchases by owner-users both dropped substantially, perhaps indicating “pandemic fatigue” in demand
- Lease transactions and gross absorption decreased 25% and 44% respectively compared to Q1 5-year averages.
- The available inventory of 263 spaces for lease is the largest on record.
- On the positive side, deal velocity picked up later in the quarter—combined transaction value grew from \$15M in January to \$55M in March—and has continued to advance so far in Q2.

(Source: Hayes Commercial Group)

Restaurant Openings and Closures:

59 Restaurants have closed on the South Coast between March 2020 and September 2021. 47 Restaurants have opened between March 2020 and September 2021.

Retail Vacancies on State Street

In Santa Barbara, the State Street promenade's outdoor dining continues to be popular and create a sense of vibrancy.

Weekends are busy and popular with weekdays being much quieter. The storefront vacancy rate on State Street at the end of Q3 2020 was 18%, a record-high. In Q1 2021, 8 new leases were signed on State Street. Vacancy has dropped to around 13%, but there are still an alarming 27 vacancies in the five-block stretch from 600 to 1000 State St.

(Sources: Hayes Commercial Group and Radius Group)

Tourism Market and Transient Occupancy Tax

The tourism industry led our areas economic recovery in summer 2020 and continues to be an extremely strong economic driver in 2021.

Summer 2021 occupancy levels in local hotels remained very healthy and rates in the hotels are high. TOT in Goleta and Santa Barbara was close to reaching pre-pandemic levels.

International travel is increasingly difficult to predict. Varying levels of vaccination in other countries and traveler sentiment continue to fluctuate dramatically. In 2021, domestic travel has made up for the loss of international visitors. Our timeline calls for welcoming back international travelers in Summer 2022.

Transient Occupancy Tax (TOT) is the City of Goleta's single largest source of revenue. Overall, TOT revenues are assumed to be \$10 million for fiscal year 2021-22 and \$11.1 million for fiscal year 2022-23. Goleta's TOT revenues peaked in fiscal year 2018-19 at \$11.6 million and dropped significantly in fiscal year 2020-21 due to the pandemic at \$6.1 million.

Santa Barbara's TOT is on the rise. The City of Santa Barbara collected \$2.2 million in transient occupancy taxes for June 2021, about \$1.4 million above June collections last year, which were down from COVID-19 restrictions and travel advisories.

Compared with June 2019, this June's revenues were higher by 17%. The revenue increase is largely because of increased average daily rates, which are 20% higher than June 2019, with occupancy only slightly higher by 1%.

The City of Santa Barbara has collected \$15.5 million in fiscal year 2021, which is about 10% below the city's adopted TOT budget of \$17.2 million.

In Carpinteria, TOT for FY 2020 was 2 million, down \$600,000 from the year before. The 2021-2022 Carpinteria Budget projects TOT climbing back up to \$2.3 million.

The local travel industry is now seeing increases in demand for rooms relative to recent months that is likely to continue throughout the summer months as the state has lifted travel advisories and as access to vaccinations has become more available.

Sales Tax

Sales tax is an important metric as it directly impacts our local cities funding and gives a window into consumer sentiment.

The City of Santa Barbara received \$5.5 million in sales tax revenue during the quarter ended March 31, 2021, which is 41% above the same quarter last year. This increase is largely a result of reduced economic activity due to the COVID-19 pandemic and related response that began in the first quarter of last year. By way of comparison, the March quarter is 2.2% higher than the March 2019 quarter two years ago. While a decline in nearly all economic sectors in the economy exists, the decline was offset by larger than expected increases in online sales, which resulted in higher sales tax than originally forecasted for the quarter ending March 2021. The Chamber is working to track sales tax in all three cities.



Homelessness

Crisis level spike in homelessness and transient disturbances throughout the South Coast and notably on State Street in Downtown Santa Barbara continue to affect business. The Chamber believes homelessness is the second largest threat to the economy after Coronavirus. Currently the City of Goleta and City of Santa Barbara are working with SBACT to hold weekly Regional Action Planning Meetings with local stakeholders to track areas of greatest impact.

In January 2020 the County conducted the last Point in Time (PIT) Count of homeless county-wide. Compared to 2019, Carpinteria's count had increased from 21 to 39, Goleta's increased from 119 to 166 and Santa Barbara increased from 887 to 914. Current estimates indicate these numbers have gone up across the County about 20%. The official counting of homeless people is done through the biennial Point in Time Count by the County of Santa Barbara. This count was cancelled in 2021 because of COVID, so the hope is that there will be a count in 2022.

Rental Housing Data

The high cost of housing continues to be a challenge on the South Coast. At the end of 2020, Zumper reported the average rent for a one-bedroom apartment in Santa Barbara was \$1,950, which is a 29% decrease compared to the previous year.

In September 2021 they reported the average rent for a 1-bedroom apartment in Santa Barbara is currently \$2,195. This is a 10% increase compared to 2020.

The average rent for a 1-bedroom apartment in Goleta is currently \$2,948. This is a 48% increase compared to the previous year.

The average rent for a 1-bedroom apartment in Carpinteria is currently \$2,195. Compared to last year, the average rent price has remained flat.

The report showed that 59% of households on the South Coast are renter-occupied, as opposed to 41% of households owner-occupied.

Area Median Income:

Area household income and median household income on the South Coast remain high and in line with other communities in coastal California.

In Carpinteria, the Average Household Income is \$130,394 and the Median Household Income is \$86,943.

In Goleta, the Average Household Income is \$134,304 and the Median Household Income is \$106,434.

In Santa Barbara, the Average Household Income is \$131,808 and the Median Household Income is \$86,619.

Chapter 5: Phase II Timeline

The Chamber worked diligently during the pandemic to provide timely and updated information to our members and the community. We found that our Roadmap to Recovery was a valuable tool that provided consensus around our challenges and set a course for our expectations around a recovery timeline. This summer, as we looked towards the June 15th date for Statewide reopening, we embarked on Roadmap to Recovery Phase II. Our goal is to address emerging issues and challenges and provide a timeline for how long recovery may take.

Recovery will not happen overnight. It will take time to recover our workforce, our businesses, schools, communities, and some certainty around the economy. We will need to work together to address long-term recovery from this pandemic-induced recession.

Santa Barbara County had a strong summer. Indoor and outdoor weddings and special events were able to resume using new safety guidelines. Travel related to weddings and special events increased significantly and there was a big uptick for event planners, caterers, florist, photographers and all other industries weddings and events support.

In August and September, our public schools (K-12) fully reopened with kids on campus and many of our local higher education institutions reopened as well. After school programs and school affiliated sports clubs have resumed.

School sponsored transportation to support regular school hours, after school programs and sports and special programming means parents can get back to work without the added stress of a lack of childcare. Transportation for students continues to be a challenge because of the shortage of bus drivers.

Universities being fully back for in-person classes mean student workers are back and available for part time work and retail and restaurants will have more patrons.

The expiration of unemployment benefits may result in softening of challenges businesses are facing due with the current labor shortage.



The Chamber's Roadmap to Recovery Phase II outlines updated milestones and markers for our recovery starting this fall:

Fall/October 2021

- Offices are planning for reopening, with some new leeway about employees having a more flexible work schedule.
- Local restaurants and meeting providers should have more business related to business lunches and group meetings, including local catering companies.
- In the fall we will be able to have more up to date Commercial Real Estate data. We will be watching to see how many offices may remain vacant due to the new ability to work remotely and how many industries see an expansion of growth and needing adequate space.

Fall/November 2021

- After 18 months of learning best practices, our businesses community can be more prepared to support their employees during flu season. The Chamber will be a champion for people getting their flu shot, sanitizing, and employers embracing the ability to work from home to keep employees safe.

Holiday Season/December 2021

- The holiday season, specifically the months of November and December, generate a significant amount of revenue for our local retail businesses. Businesses being able to be fully staffed and have the supply chain and business to support their past retail surge will be a significant marker in our recovery.

January-March 2022

- Many offices are not going back until January. This will be the time that businesses will be transitioning their lunchrooms, buffets, communal spaces, back to normal or with permanent modifications.
- The months of January-March are typically slower for travel. Our goal would be for all hotels and hospitality businesses to be fully staffed and to run a robust marketing campaign and incentives to increase that shoulder season travel.
- By January we should have rebuilt our business, meeting and wedding businesses.

Summer 2022

- By next summer we want to be welcoming international travelers back to the South Coast.
- Supply Chain issues continue to slow down recovery across industries, a marker towards recovery will be if these issues are resolved by next summer.