

Labor Market Research South Central Coast Region

June 2017

Prepared By:

Lori Sanchez

Center of Excellence

South Central Coast Region

lsanchez144@mtsac.edu

Prepared For:

South Central Coast Regional Consortium



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Centers of Excellence, Economic and Workforce Development Program

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Introduction

The 2016 approved Strong Workforce Program (SWP) requires that community colleges utilize data to inform investment decisions in career technical education for the purpose of “more” and “better” programs.

This report is intended to provide foundational information to assist local college conversations and broader regional discussions amongst workforce partners to address the SWP recommendations to increase student enrollment in programs that lead to high-demand, high-wage jobs and to increase student completions and transfers, increased wage earnings, and increased employment rates.

Data contained in this report represents traditional occupation and industry data for the **South Central Coast Region**, comprised of San Luis Obispo, Santa Barbara and Ventura counties and the northern part of Los Angeles County.¹ Additional information is provided by content from employer job postings in the area.

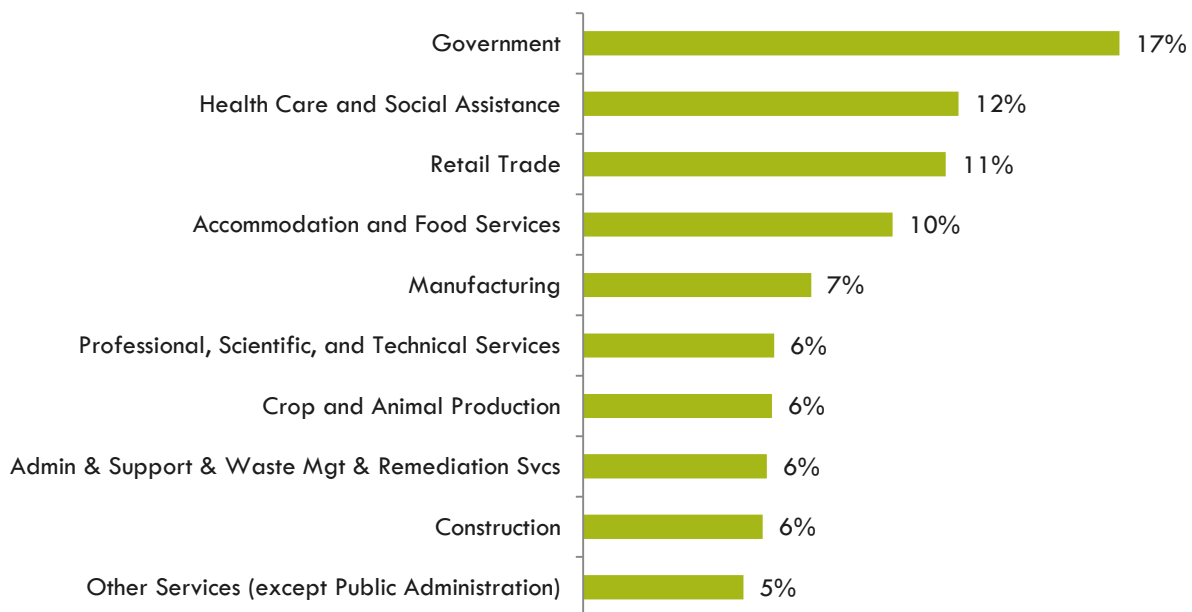
Industry Employment

Employment Composition

In 2016, there were nearly 960,000 jobs in the South Central Coast region, employed across all industries. The exhibit below depicts the employment share for the top 10 industries, by the percentage of jobs. In the region, as is typical across the state, the government sector accounts for the majority of employment (17% or 158,668 jobs). Following government, healthcare and social assistance, (111,084 jobs) retail trade (107,319 jobs) and accommodation and food services (91,590 jobs) are the largest industry employers. Combined, these four industry sectors account for nearly half of all jobs in the region – 47% or 469,000 jobs.

53,000 new jobs in the region by 2021

Exhibit 1: South Central Coast Industry Employment by Major Groups, 2016



Source: EMSI

¹ For the purposes of this report, northern Los Angeles is geographically defined by zip codes (included in Appendix A).

Regional Advantage

Important to the consideration of workforce development is an understanding of the strengths of a regional economy. The 2016 Central Coast Economic Forecast identified tourism-related industries as areas of economic growth. Particularly, the intersection of the region's booming wine industry and support industries like tourism, hospitality, and retail. Indeed, this regional advantage is supported by location quotient data.²

In the region, crop production generates a high location quotient. Specifically in the support activities for crop production sub-sector. In addition to direct employment, this sector indirectly contributes to related sub-sectors, such as retail, hospitality, tourism, and transportation and warehousing.

Exhibit 2: South Central Coast Industry Employment Data

Industry	2016 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2016 Total Annual Earnings	2016 Location Quotient
Crop and Animal Production	55,833	2,448	4%	\$38,825	4.71
Arts, Entertainment, and Recreation	19,205	1,205	6%	\$35,888	1.18
Utilities	3,902	192	5%	\$175,647	1.15
Accommodation and Food Services	91,590	8,534	9%	\$24,698	1.12
Government	158,668	5,481	3%	\$91,941	1.08
Retail Trade	107,319	5,038	5%	\$38,555	1.07
Real Estate and Rental and Leasing	16,338	450	3%	\$54,215	1.04
Construction	53,137	1,223	2%	\$56,280	1.03
Other Services (except Public Administration)	47,405	1,980	4%	\$27,486	1.03
Health Care and Social Assistance	111,084	18,571	17%	\$56,393	0.92
Professional, Scientific, and Technical Services	56,489	2,348	4%	\$80,257	0.92
Administrative and Support and Waste Management and Remediation Services	54,369	315	1%	\$40,672	0.91
Educational Services	22,084	2,093	9%	\$41,684	0.90
Information	14,972	1,179	8%	\$87,253	0.84

Source: EMSI

² When interpreting the data, a location quotient greater than 1.0 indicates that the economy is self-sufficient, and may even be exporting the good or service of that particular industry. (As a rule of thumb, a location quotient greater than 1.25 almost certainly identifies exporting industries.) On the other hand, a location quotient less than 1.0 suggests that the region tends to import the good or service. (The applicable rule of thumb is that a location quotient less than 0.75 indicates an importing industry.) Source: www.economictoolbox.mit.edu

Occupational Employment Outlook

In 2016, there were nearly 960,000 jobs across all occupations in the South Central Coast Region. Over the next five years, the number of new jobs is expected to increase by 52,588, bringing the total number of jobs in the region to over 1 million jobs. Additionally, the region can anticipate approximately 132,000 employment opportunities as a result of replacement jobs.³

Annually, the labor market is expected to have a need for 37,000 workers across the region and across industries.

Employment by education requirement

The following four exhibits list the most “in-demand” occupations by typical minimum education requirement — where “in-demand” is defined as most total job openings over the next five years.⁴

The number of jobs for all occupations requiring a bachelor’s degree in 2016 was 186,578. Approximately 6,250 jobs are projected annually for occupations requiring this education level in the region. Exhibit 3 details only the occupations with the most annual openings over the next five years.

Exhibit 3: Bachelor’s Degree Occupations

Occupation	2016 Jobs	5-Yr Change	Annual Openings	Entry Level Hourly Wage
Registered Nurses	12,489	1,607	643	\$31.86
Elementary School Teachers, Except Special Education	8,678	325	265	\$23.42
Accountants and Auditors	6,853	335	262	\$21.85
Secondary School Teachers, Except Special and Career/Technical Education	5,065	208	167	\$24.55
Substitute Teachers	5,549	182	145	\$14.52

Source: EMSI

The number of jobs for all occupations requiring an associate degree in 2016 was 20,075. Approximately 720 jobs are projected annually for occupations requiring this education level in the region. Exhibit 4 details only the occupations with the most annual openings over the next five years.

Exhibit 4: Associate Degree Occupations

Occupation	2016 Jobs	5-Yr Change	Annual Openings	Entry Level Hourly Wage
Preschool Teachers (except Special Education)	2,664	62	98	\$10.50
Dental Hygienists	1,437	157	57	\$30.81
Web Developers	1,249	123	44	\$17.05
Radiologic Technologists	1,025	95	40	\$20.66
Medical and Clinical Laboratory Technicians	714	92	37	\$14.68

Source: EMSI

³ Replacements are an estimate of how many workers in a specific occupation will vacate that occupation entirely (separate) due to career change, retirement or other circumstances in a given time period. Openings is the sum of Change (new job growth) and Replacements.

⁴ Certain educational or work experience requirement groups are not included— occupations that require master’s degree, doctoral degree, and first professional degree — due to minimal relevance to community college instruction and/or low employment levels coupled with low demand.

The number of jobs for all occupations requiring some college or a certificate in 2016 was 73,177. Approximately 2,700 jobs are projected annually for occupations requiring this education level in the region. Exhibit 5 details only the occupations with the most annual openings over the next five years.

Exhibit 5: Some College/Certificate Occupations

Occupation	2016 Jobs	5-Yr Change	Annual Openings	Entry Level Hourly Wage
Nursing Assistants	5,445	1023	344	\$10.46
Teacher Assistants	8,970	451	314	\$9.90
Medical Assistants	4,737	625	233	\$12.18
Licensed Vocational Nurses	3,105	472	193	\$19.09
Heavy and Tractor-Trailer Truck Drivers	5,819	375	190	\$13.45

Source: EMSI

The number of jobs for all occupations requiring a high school diploma or equivalent in 2016 was 317,273. Approximately 10,460 jobs are projected annually for occupations requiring this education level in the region. Exhibit 6 details only the occupations with the most annual openings over the next five years.

Exhibit 6: HS Diploma or Equivalent Occupations

Occupation	2016 Jobs	5-Yr Change	Annual Openings	Entry Level Hourly Wage
Office Clerks, General	18,346	983	609	\$9.59
Customer Service Representatives	9,684	604	375	\$10.60
First-line Supervisors of Food Preparation and Serving Workers	5,887	703	331	\$10.17
First-Line Supervisors of Retail Sales Workers	9,974	245	320	\$11.52
Maintenance and Repair Workers, General	7,472	538	316	\$11.66

Source: EMSI

Community College Program Offerings

From 2013-2016, the South Central Coast has reported an average of 16,486 awards (certificates and degrees) annually across 437 career and technical education programs.

Exhibit 7 lists the top twenty vocational programs by average annual awards. As shown in the exhibit below, registered nursing conferred the most awards, followed by administration of justice, and child development/early care and education.

Exhibit 7: Average Annual Awards (2013-2016)

TOP	Program	Annual 3-Year Average
1230.10	Registered Nursing	535
2105.00	Administration of Justice	527
1305.00	Child Development/Early Care and Education	465
0502.00	Accounting	322
2133.00	Fire Technology	200
0948.00	Automotive Technology	145
0506.00	Business Management	126
1230.20	Licensed Vocational Nursing	113
0514.00	Office Technology/Office Computer Applications	91
2104.40	Alcohol and Controlled Substances	88
0509.00	Marketing and Distribution	86
1402.00	Paralegal	86
0708.10	Computer Networking	81
0956.50	Welding Technology	80
0102.00	Animal Science	72
1306.30	Culinary Arts	72
1239.00	Psychiatric Technician	69
1223.00	Health Information Technology	67
3007.00	Cosmetology and Barbering	62
0958.00	Water and Wastewater Technology	55
1302.00	Interior Design and Merchandising	54

Source: <http://datamart.cccco.edu/>

Comparing the labor market demand for occupations requiring community college relevant training and education to programs with the most awards being conferred offers some interesting insights. The labor market appears to be in need of workers prepared in several healthcare occupations, early childhood education but also in information technology. A further look at occupations matched to career technical education programs would uncover areas for program growth and investment.

San Luis Obispo County Overview

There were 133,437 jobs across all industries in the San Luis Obispo County region in 2016, this number is expected to increase 8% by 2021 (10,378 new and replacement jobs). The Accommodation and Food Services industry had the most 2016 jobs and Health Care and Social Assistance is expected to have the most job openings within the next five years (1,876 jobs).

Exhibit 8: Top 3 Industries in San Luis Obispo County

<u>Accommodation & Food Services</u>	<u>Retail Trade</u>	<u>Health Care & Social Assistance</u>
2016 Jobs: 16,963	2016 Jobs: 14,795	2016 Jobs: 14,498
2021 Jobs: 18,586	2021 Jobs: 15,193	2021 Jobs: 16,374
Change (Growth): 1,623	Change (Growth): 398	Change (Growth): 1,876
Change %: 10 percent	Change %: 3 percent	Change %: 13 percent

Source: EMSI

Employer Demand: Job Postings

Employer demand can be understood, in part, by analyzing online job postings. Job postings data on employers, job titles, skills, and certifications was compiled for San Luis Obispo County.

Exhibit 9 below shows the results of the area employers with the most job advertisements posted in 2016. In the county, there were 9,378 job postings that included an employer. In accordance with the traditional labor market information, healthcare and education employers advertised the most jobs.

Exhibit 9 – Top Employers

Employer	Number of Job Postings, Jan–Dec 2016
California State University	506
Dignity Health	341
Community Action Partnership of San Luis Obispo County Inc.	163
Paso Robles Joint Unified School District	162
Lucia Mar Unified School District	148
San Luis Coastal Unified	125
Cuesta College	120
The Hospitals Of Providence	116
Mindbody Software	114
Bank of America	113

Source: Burning Glass, 2016

Common Job Titles

Job titles most commonly advertised by area employers included registered nurse, truck driver, sales associate, and other healthcare related titles.

Exhibit 10 – Top Job Titles

Title	Number of Job Postings, Jan – Dec 2016
Registered Nurse	673
Truck Driver	409
Sales Associate	192
Physical Therapist	181
Speech Language Pathologist	164
Certified Nursing Assistant	152
Customer Service Representative	144
Merchandise	127
Licensed Vocational Nurse (LVN)	121
Store Associate	93

Source: Burning Glass, 2016

Skills, Education, and Certification Requirements

For the calendar year 2016, 8,834 job postings listed fundamental skills and 3,600 job postings listed desired certifications. Exhibit 11 below shows the fundamental skills on the left and the required certifications on the right. Not surprisingly, employers are seeking workers with the ability to interact with customers, who have skills in sales and also with office skills like scheduling, Microsoft Office, and budgeting. Certifications most in demand are registered nurse, licensed vocational nurse, and certified nursing assistant in addition to basic CPR and a state driver's license.

Exhibit 11 – Top Skills and Certifications in San Luis Obispo

Fundamental Skills (Specialized)		Certifications	
Skill	Number of Job Postings, Jan–Dec 2016	Certification	Number of Job Postings, Jan–Dec 2016
Customer Service	1,889	Registered Nurse	1,012
Sales	1,377	First Aid CPR AED	524
Scheduling	1,124	CDL Class A	381
Microsoft Excel	1,118	Licensed Vocational Nurse (LVN)	162
Supervisory Skills	1,018	Certified Nursing Assistant	149
Retail Setting	981	Basic Cardiac Life Support Certification	121
Microsoft Office	862	CA License	102
Budgeting	823	Advanced Cardiac Life Support (ACLS) Certification	97
Customer Contact	704	Certified Medical Assistant	92
Teaching	686	Series 7	80

Source: Burning Glass, 2016

Santa Barbara County Overview

There were 224,324 jobs across all industries in the Santa Barbara County region in 2016, this number is expected to increase by 6% by 2021 (14,008 new and replacement jobs). Health Care and Social Assistance was the industry with the most jobs in 2016 (24,727 jobs), and is expected to have the most job openings within the next five years (3,782 jobs).

Exhibit 12: Top 3 Industries in Santa Barbara County

<u>Health Care & Social Assistance</u>	<u>Accommodation & Food Services</u>	<u>Crop and Animal Production</u>
2016 Jobs: 24,727	2016 Jobs: 23,967	2016 Jobs: 22,301
2021 Jobs: 28,509	2021 Jobs: 26,299	2021 Jobs: 24,326
Change (Growth): 3,782	Change (Growth): 2,332	Change (Growth): 2,025
Change %: 15 percent	Change %: 10 percent	Change %: 9 percent

Source: EMSI

Employer Demand: Job Postings

Employer demand can also be understood, in part, by analyzing online job postings. Job postings data on employers, job titles, skills, and certifications was compiled for Santa Barbara County.

Exhibit 13 below shows the results of the area employers with the most job advertisements posted in 2016. In the county, there were 17,116 job postings that included an employer. Health care, professional services, and hospitality employers posted the most jobs in the region.

Exhibit 13 – Top Employers

Employer	Number of Job Postings, Jan–Dec 2016
Dignity Health	697
Cottage Health System	671
Raytheon	377
Deckers Brands	288
The Delta Companies	276
Kimpton Hotel & Restaurant Group	234
Citrix	212
Santa Barbara Unified School District	173
Doubletree Hotel	171
University of California	164

Source: Burning Glass, 2016

Common Job Titles

Job titles most commonly advertised by area employers included registered nurse, software developer engineer, and administrative assistant.

Exhibit 14 – Top Job Titles

Title	Number of Job Postings, Jan – Dec 2016
Registered Nurse	1,052
Software Development Engineer	415
Administrative Assistant	339
Physical Therapist	332
Speech Language Pathologist	291
Truck Driver	290
Sales Associate	263
Customer Service Representative	258
Receptionist	233
Merchandiser	228

Source: Burning Glass, 2016

Skills, Education, and Certification Requirements

For the calendar year 2016, 19,292 job postings listed fundamental skills and 6,461 job postings listed desired certifications. Exhibit 15 below shows the fundamental skills on the left and the required certifications on the right. Employers are seeking workers with the ability to interact with customers, Microsoft Office experience, and who have skills in sales, scheduling, and budgeting. Certifications most in demand are registered nurse, First Aid CPR, and security clearance.

Exhibit 15 – Top Skills and Certifications in Santa Barbara County

Fundamental Skills (Specialized)		Certifications	
Skill	Number of Job Postings, Jan–Dec 2016	Certification	Number of Job Postings, Jan–Dec 2016
Customer Service	3,497	Registered Nurse	1,948
Microsoft Excel	3,048	First Aid CPR AED	743
Sales	2,750	Security Clearance	641
Microsoft Office	2,405	CDL Class A	454
Scheduling	2,324	CA License	297
Budgeting	1,707	Licensed Vocational Nurse (LVN)	255
Retail Setting	1,651	Certified Public Accountant (CPA)	220
Supervisory Skills	1,624	Advanced Cardiac Life Support (ACLS) Certification	145
Microsoft Word	1,434	Certified Nursing Assistant	138
Customer Contact	1,332	Basic Cardiac Life Support Certification	136

Source: Burning Glass, 2016

Ventura County Overview

There were 365,638 jobs in the Ventura County region in 2016, this number is expected to increase by 4% by 2021 (14,014 new and replacement jobs). Retail Trade was the industry with the most jobs in 2016 (41,902 jobs), while Health Care and Social Assistance is expected to have the most job openings within the next five years (6,464 jobs).

Exhibit 16: Top 3 Industries in Ventura County

<u>Retail Trade</u>	<u>Health Care & Social Assistance</u>	<u>Accommodation & Food Services</u>
2016 Jobs: 41,902	2016 Jobs: 40,310	2016 Jobs: 31,378
2021 Jobs: 44,394	2021 Jobs: 46,774	2021 Jobs: 33,677
Change (Growth): 2,492	Change (Growth): 6,464	Change (Growth): 2,299
Change %: 6 percent	Change %: 16 percent	Change %: 7 percent

Source: EMSI

Employer Demand: Job Postings

Employer demand can be understood, in part, by analyzing online job postings. Job postings data on employers, job titles, skills, and certifications was compiled for Ventura County.

Exhibit 17 below shows the results of the area employers with the most job advertisements posted in 2016. In the county, there were 33,637 job postings that included an employer. Biotechnology, healthcare, and financial services employers advertised the most jobs in 2016.

Exhibit 17 – Top Employers

Employer	Number of Job Postings, Jan–Dec 2016
Amgen	2,115
Anthem Blue Cross	640
Dignity Health	489
Bank of America	452
Pennymac	421
AlliedBarton Security Services	350
Hospital Corporation of America	320
Atria Senior Living	312
The Delta Companies	244
Ventura County Community College District	231

Source: Burning Glass, 2016

Common Job Titles

Job titles most commonly advertised by area employers included registered nurse, customer service representative, administrative assistant, and sales associate.

Exhibit 18 – Top Job Titles

Title	Number of Job Postings, Jan – Dec 2016
Registered Nurse	1,592
Customer Service Representative	629
Administrative Assistant	603
Sales Associate	594
Truck Driver	563
Security Officer	503
Speech Language Pathologist	476
Physical Therapist	411
Receptionist	367
Sales Representative	342

Source: Burning Glass, 2016

Skills, Education, and Certification Requirements

For the calendar year 2016, 40,007 job postings listed fundamental skills and 11,126 job postings listed desired certifications. Exhibit 19 below shows the fundamental skills on the left and the required certifications on the right. Employers in Ventura County are seeking workers with the ability to interact with customers, Microsoft Office experience, and who have skills in sales. Certifications most in demand are registered nurse, Class A Driver's License, and First Aid CPR.

Exhibit 19 – Top Skills and Certifications in Ventura County

Fundamental Skills (Specialized)		Certifications	
Skill	Number of Job Postings, Jan–Dec 2016	Certification	Number of Job Postings, Jan–Dec 2016
Customer Service	7,590	Registered Nurse	2,820
Microsoft Excel	6,561	CDL Class A	1,130
Sales	5,791	First Aid CPR AED	1,047
Microsoft Office	4,973	Security Clearance	839
Scheduling	4,836	Certified Public Accountant (CPA)	541
Project Management	3,829	Project Management Certification (E.G. PMP)	374
Retail Setting	3,531	Critical Care Registered Nurse (CCRN)	282
Budgeting	3,482	Licensed Vocational Nurse (LVN)	259
Customer Contact	3,096	Certified Nursing Assistant	254
Supervisory Skills	3,014	Basic Cardiac Life Support Certification	251

Source: Burning Glass, 2016

Northern Los Angeles County Overview

There were 236,513 jobs across all industries in the Northern Los Angeles County region in 2016, and this number is expected to increase by 6% by 2021 (14,189 new and replacement jobs). Health Care and Social Assistance was the industry with the most jobs in 2016 (31,549 jobs), and is expected to have the most job openings within the next five years (6,449 jobs).

Exhibit 20: Top 3 Industries in Northern Los Angeles County

<u>Health Care & Social Assistance</u>	<u>Retail Trade</u>	<u>Accommodation & Food Services</u>
2016 Jobs: 31,549	2016 Jobs: 30,538	2016 Jobs: 19,282
2021 Jobs: 37,998	2021 Jobs: 32,304	2021 Jobs: 21,562
Change (Growth): 6,449	Change (Growth): 1,766	Change (Growth): 2,280
Change %: 20 percent	Change %: 6 percent	Change %: 12 percent

Source: EMSI

Employer Demand: Job Postings

Employer demand can be understood, in part, by analyzing online job postings. Job postings data on employers, job titles, skills, and certifications was compiled for Northern Los Angeles County.

Exhibit 21 below shows the results of the area employers with the most job advertisements posted in 2016. In this region, there were 19,133 job postings that included an employer. As shown below, Lockheed Martin Corporation posted the most job advertisements, followed by Northrop Grumman, and Henry Mayo Newhall Hospital.

Exhibit 21 – Top Employers

Employer	Number of Job Postings, Jan–Dec 2016
Lockheed Martin Corporation	605
Northrop Grumman	532
Henry Mayo Newhall Hospital	390
Boston Scientific Corporation	291
The Master's College	272
William S Hart Union High School District	248
College Of The Canyons	242
Princess Cruise Lines	199
Westside Union School District	198
Universal Health Services, Inc.	189

Source: Burning Glass, 2016

Common Job Titles

Job titles most commonly advertised by area employers included registered nurse, truck driver, speech language pathologist, and physical therapist.

Exhibit 22 – Top Job Titles

Title	Number of Job Postings, Jan – Dec 2016
Registered Nurse	784
Truck Driver	642
Speech Language Pathologist	424
Physical Therapist	312
Sales Associate	283
Customer Service Representative	227
Occupational Therapist	220
Administrative Assistant	196
Sales Representative	192
Instructional Assistant	182

Source: Burning Glass, 2016

Skills, Education, and Certification Requirements

For the calendar year 2016, 18,710 job postings listed fundamental skills and 6,963 job postings listed desired certifications. Exhibit 23 below shows the fundamental skills on the left and the required certifications on the right. Employers in this region are seeking workers with the ability to interact with customers, who have skills in sales, and also with office skills like scheduling and Microsoft Office. Certifications most in demand are registered nurse, First Aid CPR, and security clearance.

Exhibit 23 – Top Skills and Certifications in Northern Los Angeles County

Fundamental Skills (Specialized)		Certifications	
Skill	Number of Job Postings, Jan–Dec 2016	Certification	Number of Job Postings, Jan–Dec 2016
Customer Service	3,239	Registered Nurse	1,440
Sales	2,885	First Aid CPR AED	941
Microsoft Excel	2,834	Security Clearance	917
Scheduling	2,553	CDL Class A	842
Microsoft Office	2,324	Critical Care Registered Nurse (CCRN)	210
Retail Setting	1,818	Licensed Vocational Nurse (LVN)	202
Supervisory Skills	1,728	CA License	150
Repair	1,441	Certified Public Accountant (CPA)	150
Microsoft Word	1,439	Forklift Operator Certification	111
Customer Contact	1,426	Automotive Service Excellence (ASE) Certification	108

Source: Burning Glass, 2016

Appendix A: Data Sources

This labor market report was prepared for the South Central Coast Regional Consortium by the South Central Coast Region Center of Excellence (COE), an initiative of the California Community Colleges' Economic and Workforce Development program.

Data included in this report represent one or more of the following geographic designations: San Luis Obispo County, Santa Barbara County, Ventura County and northern Los Angeles County (zip codes: 91310, 91321, 91322, 91350, 91351, 91354, 91355, 91380, 91381, 91383, 91384, 91385, 91386, 91387, 91390, 93510, 93532, 93534, 93535, 93536, 93539, 93543, 93544, 93550, 93551, 93552, 93553, 93584, 93586, 93590, 93591, and 93599).

Data Sources

Industry and occupational employment estimates and projections, wages and other data – Economic Modeling Specialists Inc. (EMSI), economicmodeling.com

Real-time employer data, <https://laborinsight.burning-glass.com/jobs/us#/>

Supply Data – program completions, http://datamart.cccco.edu/Outcomes/Program_Awards.aspx