

Regional Economic Analysis Profile

Coastal Economic Sub-Market
Monterey, San Benito, and Santa Cruz Counties
March 2015



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** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

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SUMMARY OF THE COASTAL ECONOMIC SUB-MARKET INDUSTRY CLUSTERS

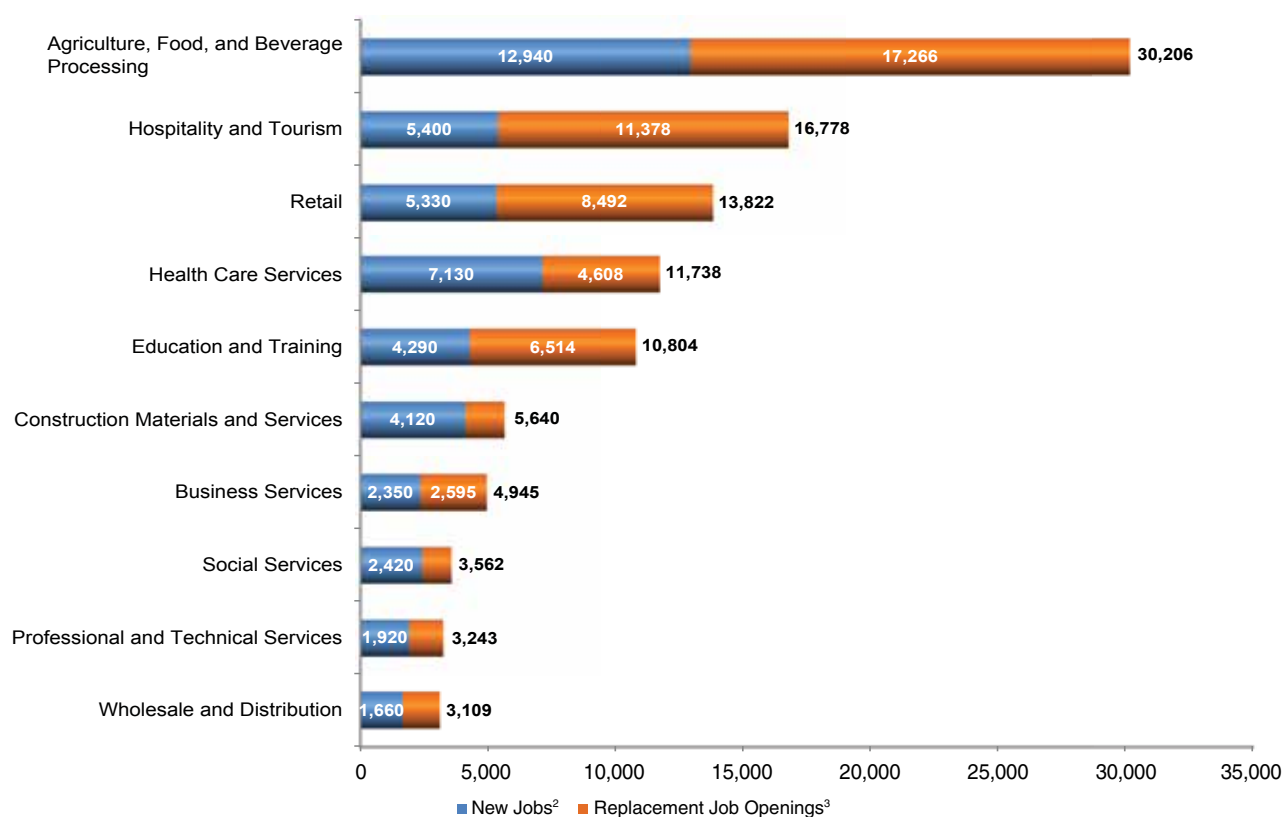
What is an Industry Cluster?

Industry clusters are groups of associated industries in an economic market that stimulate the creation of new businesses and job opportunities in a particular field. The application of workforce and economic development resources toward the continual development of industry clusters will help stimulate economic growth and boost the number of employment opportunities for the labor force.

Purpose of this Report

The purpose of this report is to help align the state's workforce institutions and programs around the needs of economic sub-market industry clusters. This report focuses on the future employment demand of economic sub-market industry clusters and features them as primary investment opportunities for the California workforce development system. The goal of this report is to account for industry clusters with the largest number of projected total job openings¹ and help the California workforce development system prepare the state's workforce to compete for these future job opportunities.

Top 10 Industry Clusters in the Coastal Economic Sub-Market**



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

¹ Total job openings are the sum of new jobs and replacement job openings.

² New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

³ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

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INDUSTRY CLUSTER DESCRIPTIONS

The following are descriptions of the Coastal Economic Sub-Market's** top 10 industry clusters followed by a list of the top industries with the highest projected total job openings in the cluster.

The **Agriculture, Food, and Beverage Processing** industry cluster includes establishments primarily engaged in growing crops, raising animals, and manufacturing food and beverages, as well as support activities for crop and animal production. This cluster employed nearly 67,000 people during 2013-2014,* or 25.2 percent of the economic sub-market's workforce. Top industries in this cluster include:

- Support Activities for Crop Production
- Fruit and Tree Nut Farming
- Vegetable and Melon Farming
- Greenhouse, Nursery, and Floriculture Production
- Other Food Manufacturing

The **Hospitality and Tourism** industry cluster includes interrelated industries such as eating establishments, hotels and motels, casinos, museums, and sightseeing transportation. During 2013-2014,* this cluster comprised more than 35,000 workers, or 13.4 percent of the economic sub-market's employment. Industries within this cluster with the most projected job openings include:

- Restaurants and Other Eating Places
- Traveler Accommodation
- Other Amusement and Recreation Industries
- Museums, Historical Sites, and Similar Institutions
- Amusement Parks and Arcades

The **Retail** industry cluster includes grocery and department stores, dollar stores, retail pharmacies, and clothing specialty stores. During 2013-2014,* this cluster employed more than 27,000 workers, or 10.4 percent of the economic sub-market's total employment. Industries projected to have the largest number of jobs (new and replacement) include:

- Grocery Stores
- Other General Merchandise Stores
- Department Stores
- Building Material and Supplies Dealers
- Automobile Dealers

The **Health Care Services** industry cluster includes acute care and outpatient hospitals, nursing home and rehabilitation centers, adult day care centers, and community service agencies for the elderly. It employed more than 23,000 people in the economic sub-market during 2013-2014,* accounting for 8.8 percent of the workforce. Top industries within this cluster include:

- General Medical and Surgical Hospitals
- Offices of Physicians
- Offices of Dentists
- Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
- Nursing Care Facilities (Skilled Nursing Facilities)

The **Education and Training** industry cluster is comprised of elementary and high schools, community colleges, universities, and professional schools with programs such as dental, law, and medical. Other establishments include English as a Second Language (ESL) programs, test preparation and tutoring, or driving instruction. During 2013-2014,* this cluster employed more than 26,000 people in the economic sub-market, accounting for 9.9 percent of the workforce. Top industries within this cluster include:

- Elementary and Secondary Schools
- Colleges, Universities, and Professional Schools
- Other Schools and Instruction
- Junior Colleges
- Business Schools and Computer and Management Training

* Quarterly Census of Employment and Wages (QCEW), a federal-state cooperative program, for the period April 2013 through March 2014.

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INDUSTRY CLUSTER DESCRIPTIONS

The **Construction Materials and Services** industry cluster is comprised of builders of mechanical systems such as electrical, heating, and water; specialty trades outfits such as drywall, flooring, and painting contractors; residential and commercial builders; and contractors who complete foundation and framing work. During 2013-2014,* nearly 10,000 workers made up the cluster's employment, representing 3.7 percent of the economic sub-market's total workforce. Top industries within this cluster include:

- Building Equipment Contractors
- Residential Building Construction
- Foundation, Structure, and Building Exterior Contractors
- Building Finishing Contractors
- Nonresidential Building Construction

The **Business Services** industry cluster is comprised of industries that include temporary help agencies, employer organizations, janitorial services, security systems services, and carpet cleaning establishments. This cluster employed almost 13,000 people during 2013-2014,* or 4.8 percent of the economic sub-market's workforce. Top industries in this cluster include:

- Services to Buildings and Dwellings
- Employment Services
- Office Administrative Services
- Management of Companies and Enterprises
- Waste Collection

The **Social Services** industry cluster is comprised of establishments and agencies (public and private) that provide non-residential services for the welfare of children, adults, the elderly, and disabled. Examples include nonmedical in-home care programs, day care centers, and community food banks. In total, the cluster employed nearly 10,000 people and accounted for 3.7 percent of the economic sub-market's workforce in 2013-2014.* Industries include:

- Individual and Family Services
- Child Day Care Services
- Vocational Rehabilitation Services
- Community Food and Housing, and Emergency and Other Relief Services

The **Professional and Technical Services** industry cluster is comprised of interrelated industries that include engineering and architectural firms, law offices, advertising companies, and accounting firms. In 2013-2014,* nearly 7,000 people were employed in the economic sub-market, or 2.6 percent of the workforce. Top industries within this cluster include:

- Management, Scientific, and Technical Consulting Services
- Other Professional, Scientific, and Technical Services
- Architectural, Engineering, and Related Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Legal Services

The **Wholesale and Distribution** cluster includes industries engaged in selling durable and nondurable goods to other businesses. Merchant wholesalers sell goods such as groceries, pharmaceuticals, and motor vehicles and parts. During 2013-2014,* nearly 7,000 people were employed in the economic sub-market, which accounted for 2.6 percent of the economic market's workforce. Industries with the highest number of expected job openings include:

- Grocery and Related Product Merchant Wholesalers
- Professional and Commercial Equipment and Supplies Merchant Wholesalers
- Machinery, Equipment, and Supplies Merchant Wholesalers
- Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- Miscellaneous Durable Goods Merchant Wholesalers

* Quarterly Census of Employment and Wages (QCEW), a federal-state cooperative program, for the period April 2013 through March 2014.

INDUSTRY CLUSTER DEFINITIONS

The following is a list of the North American Industry Classification System (NAICS) codes and corresponding industries that fall under each of the top 10 industry clusters in the Coastal Economic Sub-Market**.

Agriculture, Food, and Beverage Processing

1111	Oilseed and Grain Farming
1112	Vegetable and Melon Farming
1113	Fruit and Tree Nut Farming
1114	Greenhouse, Nursery, and Floriculture Production
1119	Other Crop Farming
1121	Cattle Ranching and Farming
1122	Hog and Pig Farming
1123	Poultry and Egg Production
1124	Sheep and Goat Farming
1125	Aquaculture
1129	Other Animal Production
1151	Support Activities for Crop Production
1152	Support Activities for Animal Production
3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3261	Plastics Product Manufacturing

Hospitality and Tourism

4871	Scenic and Sightseeing Transportation, Land
4872	Scenic and Sightseeing Transportation, Water
4879	Scenic and Sightseeing Transportation, Other
5615	Travel Arrangement and Reservation Services
7121	Museums, Historical Sites, and Similar Institutions
7131	Amusement Parks and Arcades
7132	Gambling Industries
7139	Other Amusement and Recreation Industries
7211	Traveler Accommodation
7212	RV (Recreational Vehicle) Parks and Recreational Camps
7213	Rooming and Boarding Houses
7223	Special Food Services

Hospitality and Tourism (Continued)

7224	Drinking Places (Alcoholic Beverages)
7225	Restaurants and Other Eating Places

Retail

4411	Automobile Dealers
4412	Other Motor Vehicle Dealers
4413	Automotive Parts, Accessories, and Tire Stores
4431	Electronics and Appliance Stores
4441	Building Material and Supplies Dealers
4451	Grocery Stores
4452	Specialty Food Stores
4453	Beer, Wine, and Liquor Stores
4461	Health and Personal Care Stores
4471	Gasoline Stations
4481	Clothing Stores
4482	Shoe Stores
4483	Jewelry, Luggage, and Leather Goods Stores
4511	Sporting Goods, Hobby, and Musical Instrument Stores
4521	Department Stores
4529	Other General Merchandise Stores
4532	Office Supplies, Stationery, and Gift Stores
4533	Used Merchandise Stores
4542	Vending Machine Operators

Health Care Services

6211	Offices of Physicians
6212	Offices of Dentists
6213	Offices of Other Health Practitioners
6214	Outpatient Care Centers
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6219	Other Ambulatory Health Care Services
6221	General Medical and Surgical Hospitals
6222	Psychiatric and Substance Abuse Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities (Skilled Nursing Facilities)
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
6239	Other Residential Care Facilities

INDUSTRY CLUSTER DEFINITIONS

Education and Training

- 6111 Elementary and Secondary Schools
- 6112 Junior Colleges
- 6113 Colleges, Universities, and Professional Schools
- 6114 Business Schools and Computer and Management Training
- 6115 Technical and Trade Schools
- 6116 Other Schools and Instruction
- 6117 Educational Support Services

Construction Materials and Services

- 2123 Nonmetallic Mineral Mining and Quarrying
- 2213 Water, Sewage and Other Systems
- 2361 Residential Building Construction
- 2362 Nonresidential Building Construction
- 2372 Land Subdivision
- 2373 Highway, Street, and Bridge Construction
- 2379 Other Heavy and Civil Engineering Construction
- 2381 Foundation, Structure, and Building Exterior Contractors
- 2382 Building Equipment Contractors
- 2383 Building Finishing Contractors
- 2389 Other Specialty Trade Contractors
- 3211 Sawmills and Wood Preservation
- 3271 Clay Product and Refractory Manufacturing
- 3272 Glass and Glass Product Manufacturing
- 3273 Cement and Concrete Product Manufacturing
- 3274 Lime and Gypsum Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 3351 Electric Lighting Equipment Manufacturing

Business Services

- 5511 Management of Companies and Enterprises
- 5611 Office Administrative Services
- 5612 Facilities Support Services
- 5613 Employment Services
- 5614 Business Support Services
- 5419 Other Professional, Scientific, and Technical
- 5616 Investigation and Security Services
- 5617 Services to Buildings and Dwellings
- 5619 Other Support Services
- 5621 Waste Collection
- 5622 Waste Treatment and Disposal
- 5629 Remediation and Other Waste Management Services

Social Services

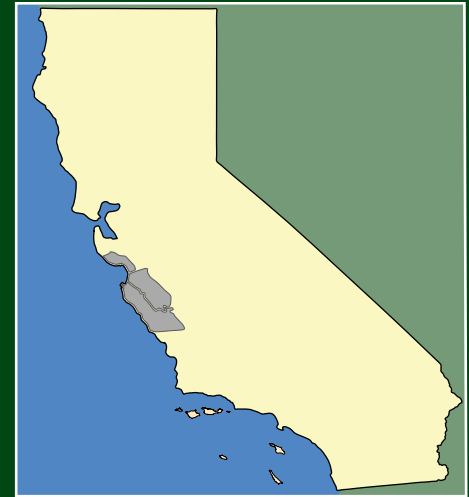
- 6241 Individual and Family Services
- 6242 Community Food and Housing, and Emergency and Other Relief Services
- 6243 Vocational Rehabilitation Services
- 6244 Child Day Care Services

Professional and Technical Services

- 5411 Legal Services
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5418 Advertising, Public Relations, and Related Services
- 5419 Other Professional, Scientific, and Technical Services

Wholesale and Distribution

- 4231 Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers
- 4233 Lumber and Other Construction Materials Merchant Wholesalers
- 4234 Professional and Commercial Equipment and Supplies Merchant Wholesalers
- 4235 Metal and Mineral (except Petroleum) Merchant Wholesalers
- 4237 Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers
- 4238 Machinery, Equipment, and Supplies Merchant Wholesalers
- 4239 Miscellaneous Durable Goods Merchant Wholesalers
- 4241 Paper and Paper Product Merchant Wholesalers
- 4242 Drugs and Druggists' Sundries Merchant Wholesalers
- 4244 Grocery and Related Product Merchant Wholesalers
- 4245 Farm Product Raw Material Merchant Wholesalers
- 4248 Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- 5323 General Rental Centers
- 5324 Commercial and Industrial Machinery and Equipment Rental and Leasing



Occupational Analysis: Agriculture, Food and Beverage Processing Cluster

Coastal Economic Sub-Market
Monterey, San Benito, and Santa Cruz Counties

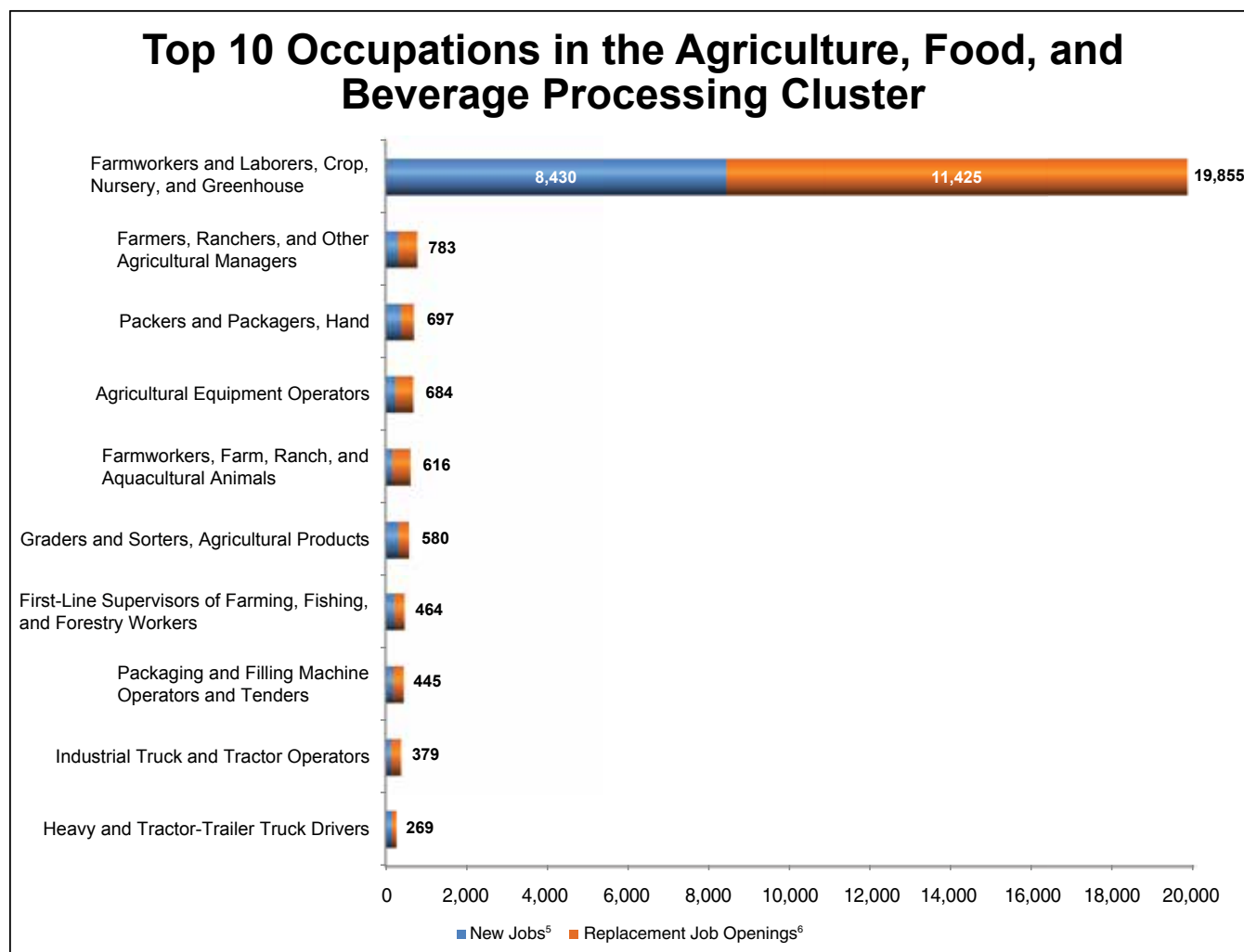
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What is the Agriculture, Food, and Beverage Processing Cluster?

The Agriculture, Food, and Beverage Processing cluster is comprised of 26 industries related to crop and animal farming as well as food and beverage manufacturing. The workers employed within this cluster span all skill levels and share Work Activities and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Agriculture, Food, and Beverage Processing Cluster

The graph below identifies the top 10 occupations in the Agriculture, Food, and Beverage Processing cluster, based on the Coastal Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent more than three-quarters of the 30,206 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, coordination, critical thinking, and monitoring.⁴



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

⁴ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

⁵ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

⁶ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

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Top 10 Occupations and Recent Job Demand in the Agriculture, Food, and Beverage Processing Cluster

The table below further profiles the Coastal Economic Sub-Market's** top 10 occupations in the Agriculture, Food, and Beverage Processing cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a recent 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ⁷ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ⁸	HWOL Job Ads ⁹ (120 days)
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	19,855	\$9.25	\$19,239	Less than high school	6
Farmers, Ranchers, and Other Agricultural Managers	783	\$41.57	\$86,462	High school diploma or equivalent	22
Packers and Packagers, Hand	697	\$9.39	\$19,546	Less than high school	9
Agricultural Equipment Operators	684	\$13.47	\$28,032	Less than high school	3
Farmworkers, Farm, Ranch, and Aquacultural Animals	616	\$14.52	\$30,192	Less than high school	15
Graders and Sorters, Agricultural Products	580	\$9.71	\$20,213	Less than high school	0
First-Line Supervisors of Farming, Fishing, and Forestry Workers	464	\$23.97	\$49,855	High school diploma or equivalent	11
Packaging and Filling Machine Operators and Tenders	445	\$11.91	\$24,775	High school diploma or equivalent	18
Industrial Truck and Tractor Operators	379	\$14.52	\$30,191	Less than high school	36
Heavy and Tractor-Trailer Truck Drivers	269	\$20.31	\$42,234	Postsecondary non-degree award	357

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending February 24, 2015.

⁷ Total job openings are the sum of new jobs and replacement job openings.

⁸ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

⁹ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

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Top Occupations for the Agriculture, Food, and Beverage Processing Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Agriculture, Food, and Beverage Processing cluster. The table includes the Coastal Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ¹⁰ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
General and Operations Managers	114	\$45.15	\$93,910	91
Accountants and Auditors	99	\$36.08	\$75,038	302
Financial Managers	54	\$53.91	\$112,135	133
Food Scientists and Technologists	50	\$39.24	\$81,620	2
Agricultural Inspectors	38	\$28.44	\$59,161	0
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Heavy and Tractor-Trailer Truck Drivers	269	\$20.31	\$42,234	357
First-Line Supervisors of Production and Operating Workers	101	\$28.06	\$58,352	132
Agricultural and Food Science Technicians	36	\$18.51	\$38,488	11
Computer, Automated Teller, and Office Machine Repairers	18	\$21.83	\$45,418	3
Electrical and Electronics Repairers, Commercial and Industrial Equipment	16	\$27.76	\$57,755	2
Requires a High School Diploma or Equivalent or Less				
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	19,855	\$9.25	\$19,239	6
Farmers, Ranchers, and Other Agricultural Managers	783	\$41.57	\$86,462	22
Packers and Packagers, Hand	697	\$9.39	\$19,546	9
Agricultural Equipment Operators	684	\$13.47	\$28,032	3
Farmworkers, Farm, Ranch, and Aquacultural Animals	616	\$14.52	\$30,192	15

Source: California Employment Development Department, Projections of Employment 2012-2022; Occupational Employment Statistics Wage Survey, updated to 4th Q, 2014; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending February 24, 2015.

¹⁰ Total job openings are the sum of new jobs and replacement job openings.

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Skill Requirements in the Agriculture, Food, and Beverage Processing Cluster

The table below lists the 10 top skills required for top occupations in the Agriculture, Food, and Beverage Processing cluster, categorized by entry-level education requirements. Active listening and critical thinking are the most commonly shared skills, followed by monitoring, reading comprehension, and speaking. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills																			
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Equipment Maintenance	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Operation and Control	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Repairing	Science	Social Perceptiveness
Requires a Bachelor's Degree or Higher																				
General and Operations Managers	•	•		•	•					•		•				•			•	•
Accountants and Auditors ¹¹	•	•			•			•			•	•				•				•
Financial Managers ¹²	•	•			•				•			•			•				•	•
Food Scientists and Technologists	•	•	•	•	•			•				•				•				•
Agricultural Inspectors	•	•			•			•				•		•		•	•			•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Heavy and Tractor-Trailer Truck Drivers		•	•		•	•						•	•	•		•				•
First-Line Supervisors of Production and Operating Workers		•		•	•					•		•				•			•	•
Agricultural and Food Science Technicians ¹³	•	•	•		•						•	•				•		•		•
Computer, Automated Teller, and Office Machine Repairers	•	•			•							•	•	•		•	•			•
Electrical and Electronics Repairers, Commercial and Industrial Equipment		•	•		•	•							•	•		•	•	•		•
Requires a High School Diploma or Equivalent or Less																				
Farmworkers and Laborers, Crop, Nursery, and Greenhouse ¹⁴		•		•	•	•	•			•		•	•	•			•			
Farmers, Ranchers, and Other Agricultural Managers ¹⁵	•	•		•	•							•				•			•	•
Packers and Packagers, Hand		•		•	•			•				•				•	•			•
Agricultural Equipment Operators		•		•	•	•							•	•		•	•			•
Farmworkers, Farm, Ranch, and Aquacultural Animals		•		•	•			•				•	•	•		•	•			•

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹¹ Skills listed represent Accountants, a specialty occupation of Accountants and Auditors.

¹² Skills listed represent Financial Managers, Branch or Department, a specialty occupation of Financial Managers.

¹³ Skills listed represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

¹⁴ Skills listed represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

¹⁵ Skills listed represent Aquacultural Manager, a specialty occupation of Farmers, Ranchers and other Agricultural Managers.

The table below lists the 10 top work activities required for top occupations in the Agriculture, Food, and Beverage Processing cluster, categorized by entry-level education requirements. The most common include making decisions and solving problems; organizing, planning and prioritizing work; and establishing and maintaining interpersonal relationships.

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹⁶ Work Activities listed represent Accountants, a specialty occupation of Accountants and Auditors.

¹⁷ Work Activities listed represent Financial Managers, Branch or Department, a specialty occupation of Financial Managers.

¹⁸ Work Activities listed represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

¹⁹ Work Activities listed represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

²⁰ Work Activities listed represent Aquacultural Manager, a specialty occupation of Farmers, Ranchers and other Agricultural Managers.

Related Occupations for the Agriculture, Food, and Beverage Processing Cluster

The table below lists top occupations in the Agriculture, Food, and Beverage Processing cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Agriculture, Food, and Beverage Processing cluster occupations.

Agriculture, Food, and Beverage Processing Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
General and Operations Managers	<ul style="list-style-type: none"> • First-Line Supervisors of Office and Administrative Support Workers • Logistics Managers • Storage and Distribution Managers
Accountants and Auditors	<ul style="list-style-type: none"> • Bookkeeping, Accounting, and Auditing Clerks • Financial Analysts • Personal Financial Advisors
Financial Managers	<ul style="list-style-type: none"> • Auditors • Marketing Managers • Sales Agents, Financial Services
Food Scientists and Technologists	<ul style="list-style-type: none"> • Biochemical Engineers • Energy Engineers • Soil and Water Conservationists
Agricultural Inspectors	<ul style="list-style-type: none"> • Construction and Building Inspectors • Energy Auditors • Precision Agriculture Technicians
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Heavy and Tractor-Trailer Truck Drivers	<ul style="list-style-type: none"> • Light Truck or Delivery Services Drivers • Pile-Driver Operators • Service Unit Operators, Oil, Gas, and Mining
First-Line Supervisors of Production and Operating Workers	<ul style="list-style-type: none"> • First-Line Supervisors of Agricultural Crop and Horticultural Workers • First-Line Supervisors of Mechanics, Installers, and Repairers • Industrial Production Managers
Agricultural and Food Science Technicians	<ul style="list-style-type: none"> • Agricultural Inspectors • Chemical Technicians • Precision Agriculture Technicians
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> • Avionics Technicians • Computer User Support Specialists • Electrical Engineering Technicians
Electrical and Electronics Repairers, Commercial and Industrial Equipment	<ul style="list-style-type: none"> • Manufacturing Production Technicians • Robotics Technicians • Stationary Engineers and Boiler Operators
Requires a High School Diploma or Equivalent or Less	
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	<ul style="list-style-type: none"> • Farmworkers, Farm, Ranch, and Aquacultural Animals • Janitors and Cleaners, Except Maids and Housekeeping Cleaners • Landscaping and Groundskeeping Workers
Farmers, Ranchers, and Other Agricultural Managers	<ul style="list-style-type: none"> • Agricultural Inspectors • First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators • Industrial Production Managers
Packers and Packagers, Hand	<ul style="list-style-type: none"> • Inspectors, Testers, Sorters, Samplers, and Weighers • Marking Clerks • Shipping, Receiving, and Traffic Clerks
Agricultural Equipment Operators	<ul style="list-style-type: none"> • Pile-Driver Operators • Refuse and Recyclable Material Collectors • Riggers
Farmworkers, Farm, Ranch, and Aquacultural Animals	<ul style="list-style-type: none"> • Fishers and Related Fishing Workers • Landscaping and Groundskeeping Workers • Nursery Workers

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Agriculture, Food, and Beverage Processing Cluster

The following table lists the Coastal Economic Sub-Market** employers in the Agriculture, Food, and Beverage Processing cluster who posted the most job advertisements during the 120-day period ending February 24, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day .

Agriculture, Food, and Beverage Processing Cluster Employers	Recent Job Advertisements ²¹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Earthbound Farm	29	38	-9	-23.7%
Nordic Naturals	16	20	-4	-20.0%
Constellation Brands Inc.	14	2	12	600.0%
Reiter Affiliated Companies	10	6	4	66.7%
S. Martinelli & Company	9	2	7	350.0%
Dole Food Company	7	2	5	250.0%
McCormick & Company	6	2	4	200.0%
Neil Jones Food Company	6	0	6	—
Golden State Bulb Growers	6	13	-7	-53.8%
Syngenta	5	3	2	66.7%
Ocean Mist Farms	5	13	-8	-61.5%
Monterey Wine Company	5	1	4	400.0%
Mann Packing Co., Inc.	5	9	-4	-44.4%
Pacific Cookie Company	4	2	2	100.0%
Delicato Family Vineyards	4	9	-5	-55.6%
J. Marchini Farms	3	0	3	—
The Neil Jones Food Company	3	0	3	—
Griffin Produce Company, Inc.	2	0	2	—
Dr. Pepper Snapple Group	2	7	-5	-71.4%
Bimbo Bakeries	2	1	1	100.0%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending February 24, 2015.

²¹ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Instructional Programs for the Top Agriculture, Food, and Beverage Processing Cluster Occupations

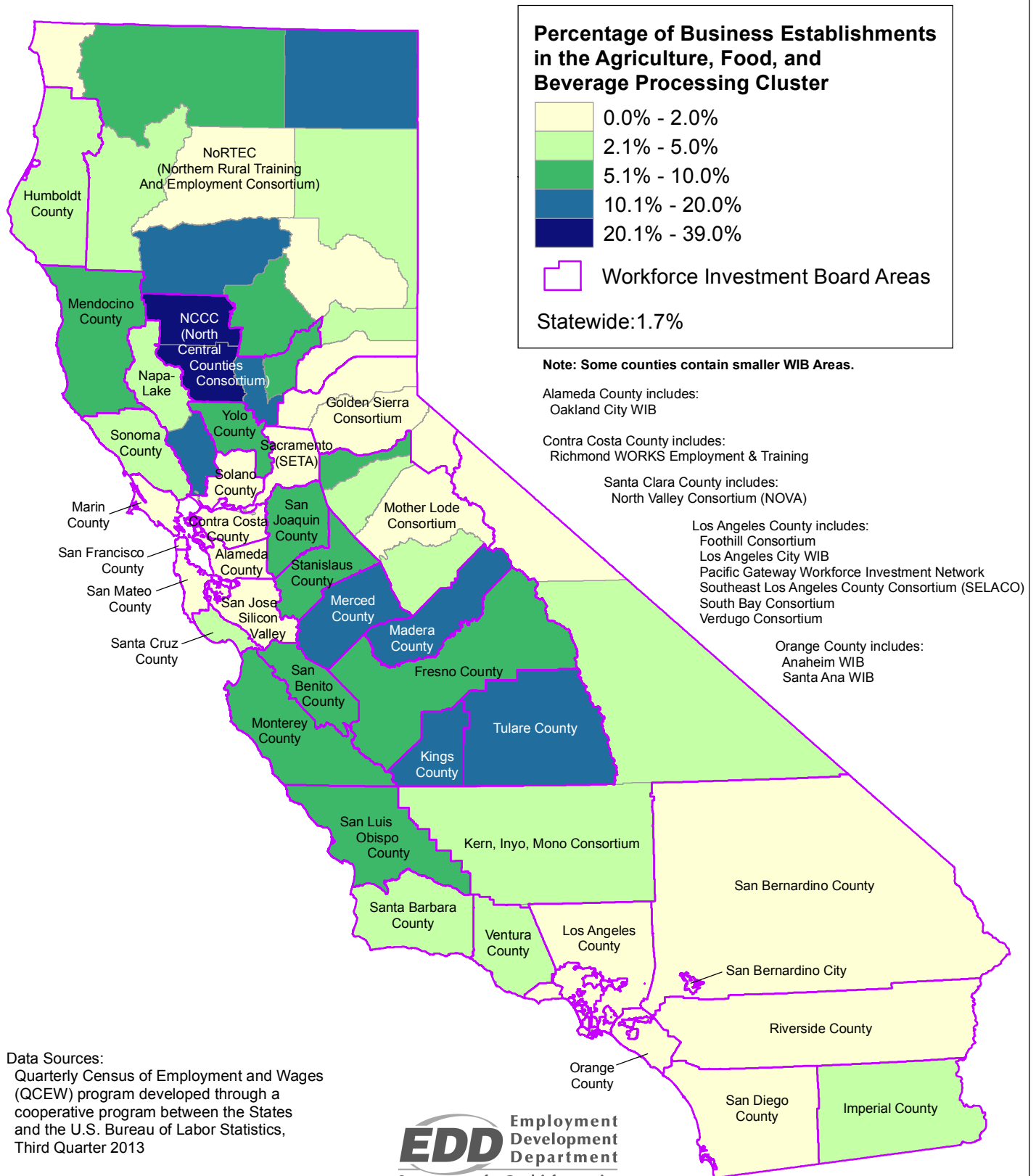
The table below provides examples of instructional programs related to some of the top occupations in the Agriculture, Food, and Beverage Processing cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Agriculture, Food, and Beverage Processing cluster. To view a more complete list of training programs, select the source links under the table below. The Taxonomy of Programs categorizes and describes instructional programs only for California Community Colleges.

Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Heavy and Tractor-Trailer Truck Drivers	49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	094750	Truck and Bus Driving
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A
Agricultural and Food Science Technicians	01.1002	Food Technology and Processing	011300	Food Processing and Related Technologies
Computer, Automated Teller, and Office Machine Repairers	47.0102 47.0104	Business Machine Repair Computer Installation and Repair Technology/Technician	093410	Computer Electronics
Electrical and Electronics Repairers, Commercial and Industrial Equipment	47.0104 47.0105	Computer Installation and Repair Technology/Technician Industrial Electronics Technology/Technician	093410 093420	Computer Electronics Industrial Electronics
Farmers, Ranchers, and Other Agricultural Managers	N/A	N/A	010240 010300 010900	Equine Science Plant Science Horticulture
Agricultural Equipment Operators	01.0204	Agricultural Power Machinery Operation	N/A	N/A

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](http://www.nces.ed.gov/ipeds) at www.nces.ed.gov; [California Community Colleges TOP-to-CIP Crosswalk](http://www.cccco.edu) 7th Edition (2010), www.cccco.edu.

California Agriculture, Food, and Beverage Processing Cluster

Percentage of Total County Establishments, 2013



Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

Cartography by:
Labor Market Information Division
California Employment Development Department
<http://www.labormarketinfo.edd.ca.gov>
July 2014

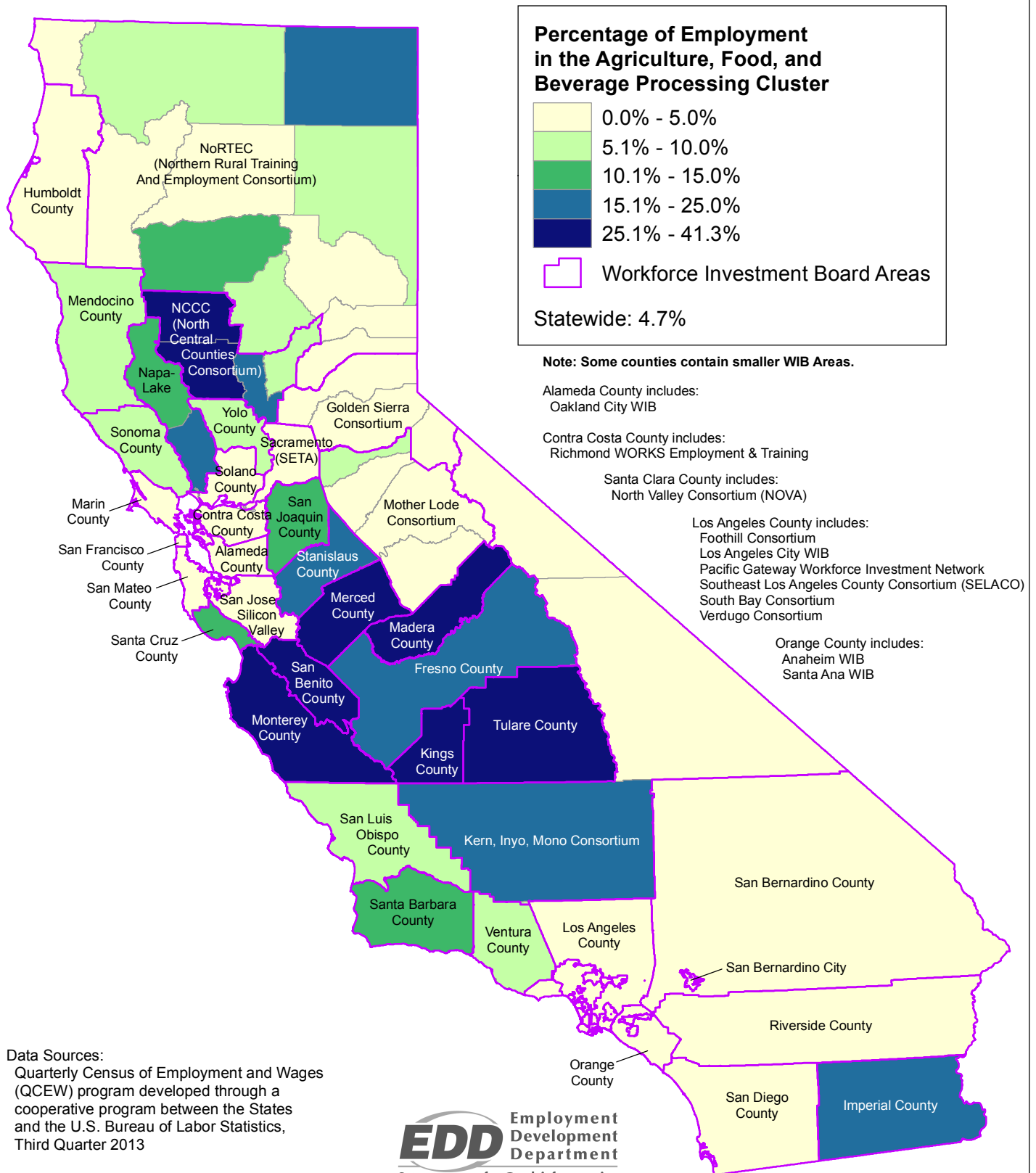
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California Agriculture, Food, and Beverage Processing Cluster

Percentage of Total County Employment, 2013



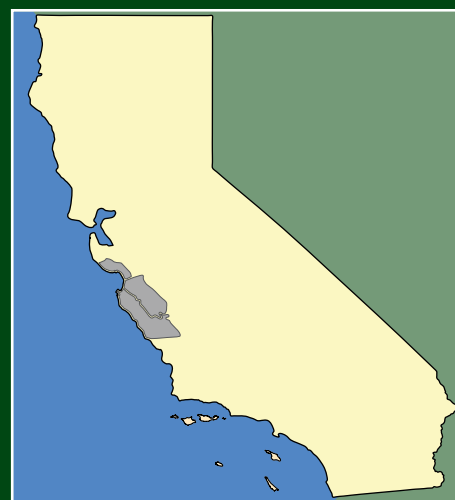
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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Occupational Analysis: Hospitality and Tourism Cluster

Coastal Economic Sub-Market
Monterey, San Benito, and Santa Cruz Counties

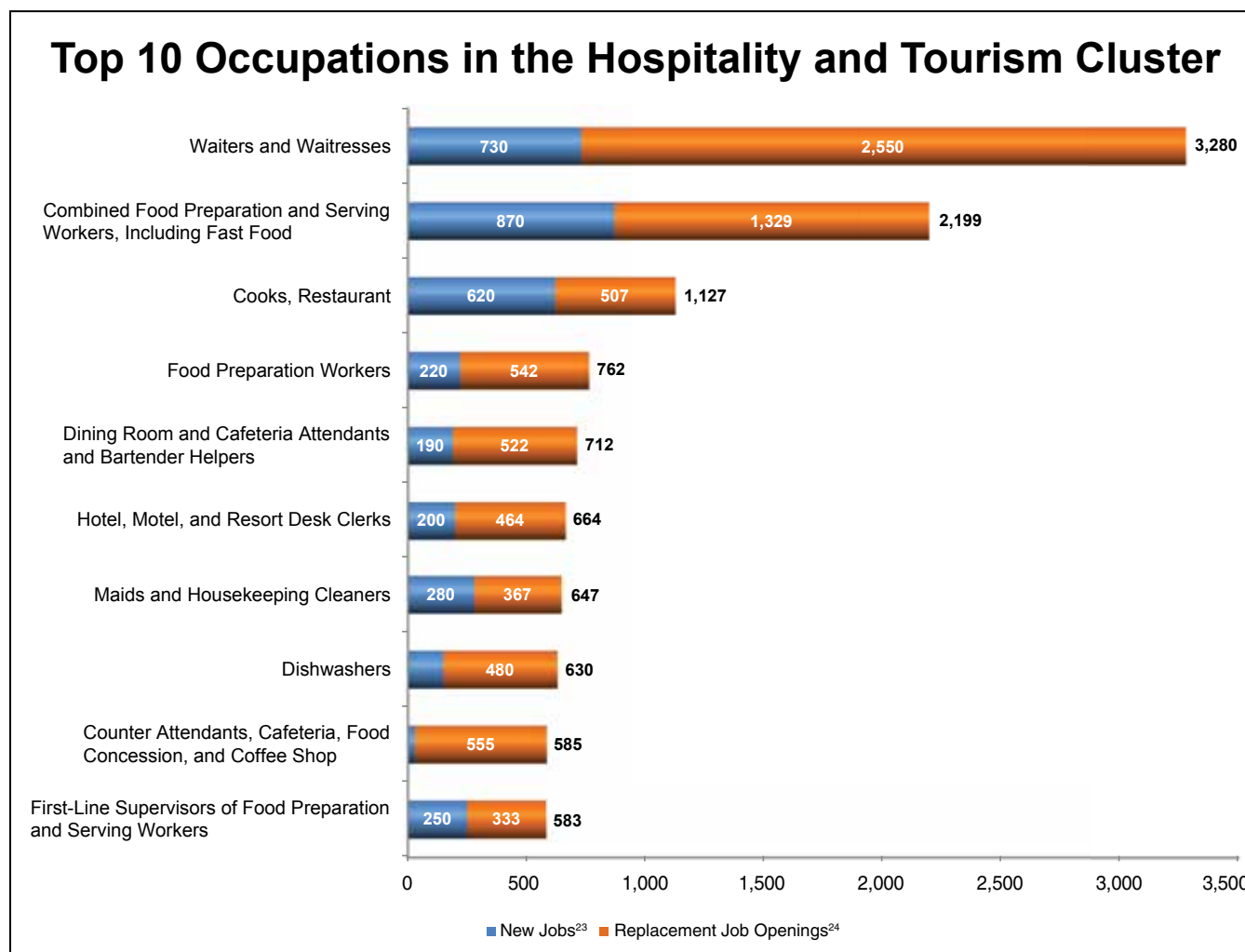
March 2015

What is the Hospitality and Tourism Cluster?

The Hospitality and Tourism cluster is comprised of 14 industries that provide goods and services related to lodging, food, recreation, travel, and sightseeing transportation. Establishments in this cluster include restaurants, hotels, casinos, golf courses, marinas, and fitness centers. The workers employed within this cluster share skills and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Hospitality and Tourism Cluster

The graph below identifies the top 10 occupations in the Hospitality and Tourism cluster, based on the Coastal Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent over half of the 16,778 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, coordination, critical thinking, monitoring, and reading comprehension.²²



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

²² U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

²³ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

²⁴ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Top 10 Occupations and Recent Job Demand in the Hospitality and Tourism Cluster

The table below further profiles the Coastal Economic Sub-Market's** top 10 occupations in the Hospitality and Tourism cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ²⁵ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ²⁶	HWOL Job Ads ²⁷ (120 days)
Waiters and Waitresses	3,280	\$9.38	\$19,511	Less than high school	225
Combined Food Preparation and Serving Workers, Including Fast Food	2,199	\$9.36	\$19,478	Less than high school	213
Cooks, Restaurant	1,127	\$12.22	\$25,433	Less than high school	324
Food Preparation Workers	762	\$9.91	\$20,631	Less than high school	96
Dining Room and Cafeteria Attendants and Bartender Helpers	712	\$9.60	\$19,957	Less than high school	51
Hotel, Motel, and Resort Desk Clerks	664	\$12.31	\$25,614	High school diploma or equivalent	220
Maids and Housekeeping Cleaners	647	\$11.05	\$22,985	Less than high school	293
Dishwashers	630	\$9.32	\$19,379	Less than high school	120
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	585	\$10.04	\$20,884	Less than high school	60
First-Line Supervisors of Food Preparation and Serving Workers	583	\$16.09	\$33,482	High school diploma or equivalent	397

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending February 24, 2015.

²⁵ Total job openings are the sum of new jobs and replacement job openings.

²⁶ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

²⁷ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Top Occupations for the Hospitality and Tourism Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Hospitality and Tourism cluster. The table includes the Coastal Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ²⁸ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
General and Operations Managers	131	\$45.15	\$93,910	91
Coaches and Scouts	52	N/A	\$40,055	86
Meeting, Convention, and Event Planners	41	\$25.02	\$52,051	17
Accountants and Auditors	29	\$36.08	\$75,038	302
Recreation Workers	22	\$11.77	\$24,489	31
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Audio and Video Equipment Technicians	25	\$24.13	\$50,189	22
Massage Therapists	18	\$21.05	\$43,793	45
Web Developers	12	\$32.09	\$66,758	167
Skincare Specialists	11	\$18.47	\$38,422	13
Emergency Medical Technicians and Paramedics	3	N/A	N/A	29
Requires a High School Diploma or Equivalent or Less				
Waiters and Waitresses	3,280	\$9.38	\$19,511	225
Combined Food Preparation and Serving Workers, Including Fast Food	2,199	\$9.36	\$19,478	213
Cooks, Restaurant	1,127	\$12.22	\$25,433	324
Food Preparation Workers	762	\$9.91	\$20,631	96
Dining Room and Cafeteria Attendants and Bartender Helpers	712	\$9.60	\$19,957	51

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending February 24, 2015.

²⁸ Total job openings are the sum of new jobs and replacement job openings.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Skill Requirements in the Hospitality and Tourism Cluster

The table below lists the 10 top skills required for top occupations in the Hospitality and Tourism cluster, categorized by entry-level education requirements. Active listening and critical thinking are the most commonly shared skills, followed by monitoring and speaking. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills																			
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation Monitoring	Operations Analysis	Persuasion	Programming	Quality Control Analysis	Reading Comprehension	Service Orientation	Social Perceptiveness
Requires a Bachelor's Degree or Higher																				
General and Operations Managers	•	•		•	•				•		•						•		•	•
Coaches and Scouts		•			•	•	•	•	•		•								•	•
Meeting, Convention, and Event Planners		•		•	•						•	•					•	•	•	•
Accountants and Auditors ²⁹	•	•			•		•			•	•						•		•	•
Recreation Workers		•		•	•	•			•		•						•	•	•	•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Audio and Video Equipment Technicians	•	•		•	•	•					•	•					•		•	
Massage Therapists	•	•			•		•				•						•	•	•	•
Web Developers	•	•	•		•		•				•		•		•		•			
Skincare Specialists	•	•		•	•		•				•						•	•	•	•
Emergency Medical Technicians and Paramedics	•	•		•	•		•				•						•	•	•	•
Requires a High School Diploma or Equivalent or Less																				
Waiters and Waitresses		•		•	•			•			•				•		•	•	•	•
Combined Food Preparation and Serving Workers, Including Fast Food		•		•	•	•		•						•			•	•	•	•
Cooks, Restaurant	•	•		•	•	•					•					•			•	
Food Preparation Workers		•	•	•	•						•						•	•	•	•
Dining Room and Cafeteria Attendants and Bartender Helpers		•		•	•		•				•						•	•	•	•

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

²⁹ Skills represent Accountants, a specialty occupation of Accountants and Auditors.

Work Activities in the Hospitality and Tourism Cluster

The table below lists the 10 top skills required for top occupations in the Hospitality and Tourism cluster, categorized by entry-level education requirements. Active listening and critical thinking are the most commonly shared skills, followed by monitoring and speaking. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Work Activities																			
	Analyzing Data or Information	Assisting and Caring for Others	Coaching and Developing Others	Communicating with Persons Outside Organization	Communicating with Supervisors, Peers, or Subordinates	Controlling Machines and Processes	Coordinating the Work and Activities of Others	Documenting/Recording Information	Establishing and Maintaining Interpersonal Relationships	Evaluating Information to Determine Compliance with Standards	Getting Information	Handling and Moving Objects	Identifying Objects, Actions, and Events	Inspecting Equipment, Structures, or Material	Interacting With Computers	Judging the Qualities of Things, Services, or People	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Organizing, Planning, and Prioritizing Work
Requires a Bachelor's Degree or Higher																				
General and Operations Managers				●	●	●	●	●								●	●	●		
Coaches and Scouts		●				●	●						●					●	●	●
Meeting, Convention, and Event Planners			●	●			●	●	●	●	●								●	●
Accountants and Auditors ³⁰	●			●			●	●	●	●						●	●	●	●	●
Recreation Workers		●	●	●	●	●	●										●	●	●	
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Audio and Video Equipment Technicians				●	●		●					●	●	●	●	●	●		●	●
Massage Therapists	●	●				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Web Developers				●				●	●	●	●	●	●	●	●	●	●	●	●	●
Skincare Specialists	●				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Emergency Medical Technicians and Paramedics	●					●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Requires a High School Diploma or Equivalent or Less																				
Waiters and Waitresses				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Combined Food Preparation and Serving Workers, Including Fast Food		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Cooks, Restaurant				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Food Preparation Workers				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Dining Room and Cafeteria Attendants and Bartender Helpers	●	●	●			●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³⁰ Work Activities represent Accountants, a specialty occupation of Accountants and Auditors.

Related Occupations for the Hospitality and Tourism Cluster

The table below lists top occupations in the Hospitality and Tourism cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Hospitality and Tourism cluster occupations.

Hospitality and Tourism Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
General and Operations Managers	<ul style="list-style-type: none"> • First-Line Supervisors of Office and Administrative Support Workers • Logistics Managers • Storage and Distribution Managers
Coaches and Scouts	<ul style="list-style-type: none"> • Health Educators • Recreation Workers • Secondary School Teachers, Except Special and Career/Technical Education
Meeting, Convention, and Event Planners	<ul style="list-style-type: none"> • Human Resources Specialists • Marketing Managers • Public Relations Specialists
Accountants and Auditors	<ul style="list-style-type: none"> • Financial Analysts • Personal Financial Advisors • Risk Management Specialists
Recreation Workers	<ul style="list-style-type: none"> • Education Administrators, Preschool and Childcare Center/Program • First-Line Supervisors of Personal Service Workers • Social and Human Service Assistants
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Audio and Video Equipment Technicians	<ul style="list-style-type: none"> • Audio-Visual and Multimedia Collections Specialists • Broadcast Technicians • Electronic Home Entertainment Equipment Installers and Repairers
Massage Therapists	<ul style="list-style-type: none"> • Hairdressers, Hairstylists, and Cosmetologists • Preschool Teachers, Except Special Education • Skincare Specialists
Web Developers	<ul style="list-style-type: none"> • Computer Programmers • Software Developers, Systems Software • Web Administrators
Skincare Specialists	<ul style="list-style-type: none"> • Dental Assistants • Medical Assistants • Self-Enrichment Education Teachers
Emergency Medical Technicians and Paramedics	<ul style="list-style-type: none"> • Licensed Practical and Licensed Vocational Nurses • Municipal Firefighters • Occupational Health and Safety Technicians
Requires a High School Diploma or Equivalent or Less	
Waiters and Waitresses	<ul style="list-style-type: none"> • Cashiers • Cooks, Fast Food • Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> • Amusement and Recreation Attendants • Counter Attendants, Cafeteria, Food Concession, and Coffee Shop • Stock Clerks, Sales Floor
Cooks, Restaurant	<ul style="list-style-type: none"> • Cooks, Institution and Cafeteria • Food Preparation Workers • Packers and Packagers, Hand
Food Preparation Workers	<ul style="list-style-type: none"> • Food Servers, Nonrestaurant • Janitors and Cleaners, Except Maids and Housekeeping Cleaners • Maids and Housekeeping Cleaners
Dining Room and Cafeteria Attendants and Bartender Helpers	<ul style="list-style-type: none"> • Locker Room, Coatroom, and Dressing Room Attendants • Meat, Poultry, and Fish Cutters and Trimmers • Ushers, Lobby Attendants, and Ticket Takers

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Hospitality and Tourism Cluster

The following table lists the Coastal Economic Sub-Market** employers in the Hospitality and Tourism cluster who posted the most job advertisements during the 120-day period ending February 24, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day period.

Hospitality and Tourism Cluster Employers	Recent Job Advertisements ³¹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Taco Bell	55	1	54	5,400.0%
Aramark Corporation	45	27	18	66.7%
Santa Cruz Seaside Company	38	27	11	40.7%
Hyatt	31	32	-1	-3.1%
Chipotle	24	8	16	200.0%
Marriott	15	67	-52	-77.6%
G6 Hospitality, LLC	14	0	14	—
Interstate Hotels & Resorts	14	0	14	—
McDonald's Corporation	13	6	7	116.7%
Carmel Valley Ranch Resort	12	7	5	71.4%
Sodexo Inc.	9	9	0	0.0%
Monterey Bay Aquarium	9	12	-3	-25.0%
Pine Inn	8	2	6	300.0%
Gold's Gym	7	24	-17	-70.8%
Panda Express	6	10	-4	-40.0%
Driscoll's	6	13	-7	-53.8%
RA Sushi	5	0	5	—
24 Hour Fitness	5	8	-3	-37.5%
P.F. Chang's China Bistro	4	0	4	—
Ventana Big Sur	4	0	4	—

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending February 24, 2015.

³¹ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Instructional Programs for the Top Hospitality and Tourism Cluster Occupations

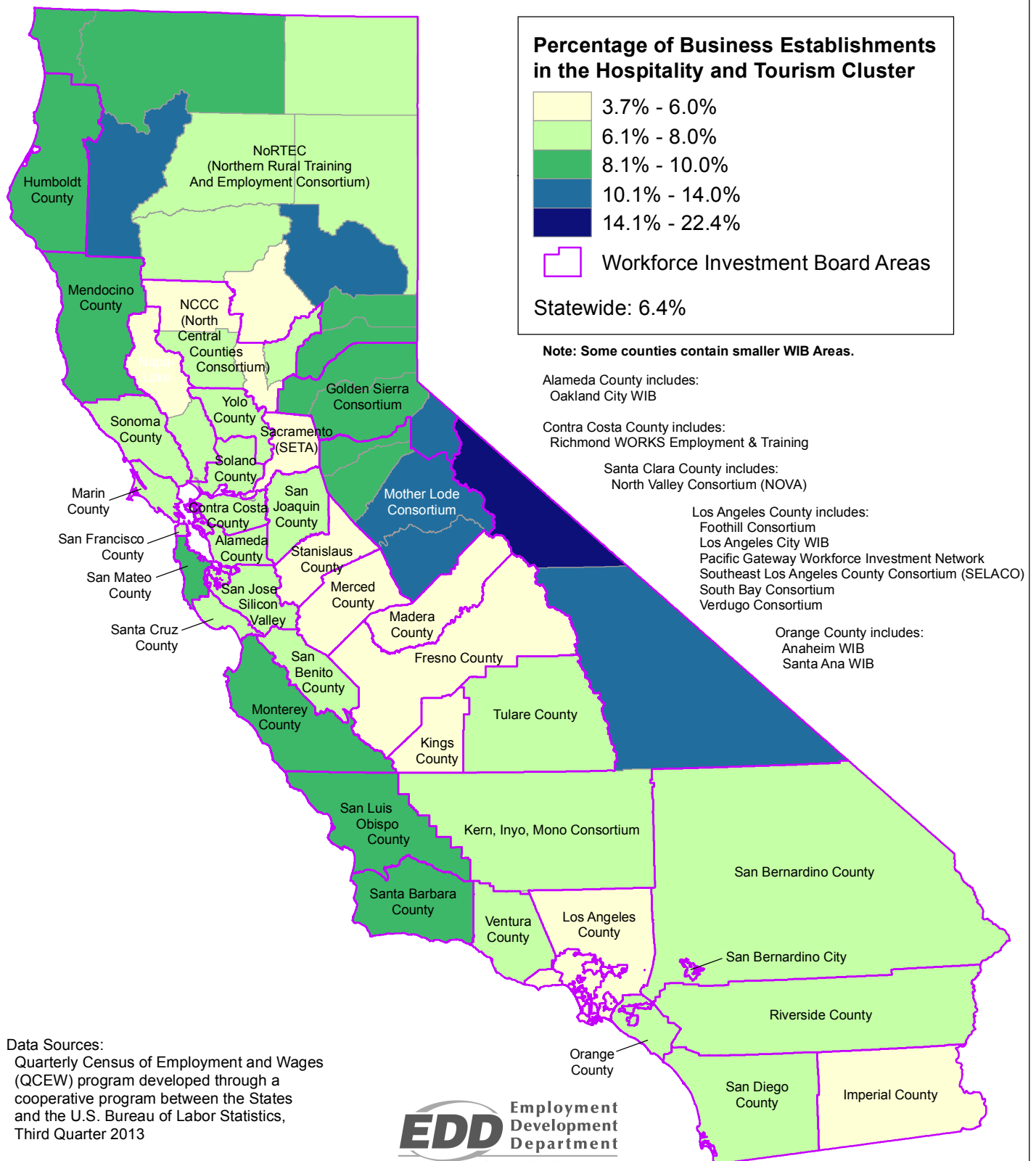
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Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Audio and Video Equipment Technicians	01.0802	Agricultural Communication/Journalism	100500	Commercial Music
	10.0201	Photographic and Film/Video Technology/Technician and Assistant	101200	Applied Photography
	10.0203	Recording Arts Technology/Technician		
Massage Therapists	51.3501	Massage Therapy/Therapeutic Massage	126200	Massage Therapy
	51.3502	Asian Bodywork Therapy		
	51.3503	Somatic Bodywork		
Web Developers	11.0201	Computer Programming/Programmer, General	061430	Website Design and Development
	11.0701	Computer Science	070700	Computer Software Development
	11.0801	Web Page, Digital/Multimedia and Information Resources Design	070710	Computer Programming
Skincare Specialists	12.0401	Cosmetology/Cosmetologist, General	300700	Cosmetology and Barbering
	12.0408	Facial Treatment Specialist/Facialist		
	12.0409	Aesthetician/Esthetician and Skin Care Specialist		
Emergency Medical Technicians and Paramedics	51.0904	Emergency Medical Technology/Technician (EMT Paramedic)	125000	Emergency Medical Services
			125100	Paramedic
Cooks, Restaurant	12.0500	Cooking and Related Culinary Arts, General	130630	Culinary Arts
	12.0503	Culinary Arts/Chef Training		

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](https://nces.ed.gov/ipeds/) at www.nces.ed.gov; [California Community Colleges TOP-to-CIP Crosswalk](http://www.cccco.edu) 7th Edition (2010), www.cccco.edu.

California Hospitality and Tourism Cluster

Percentage of Total County Establishments, 2013



Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

Cartography by:
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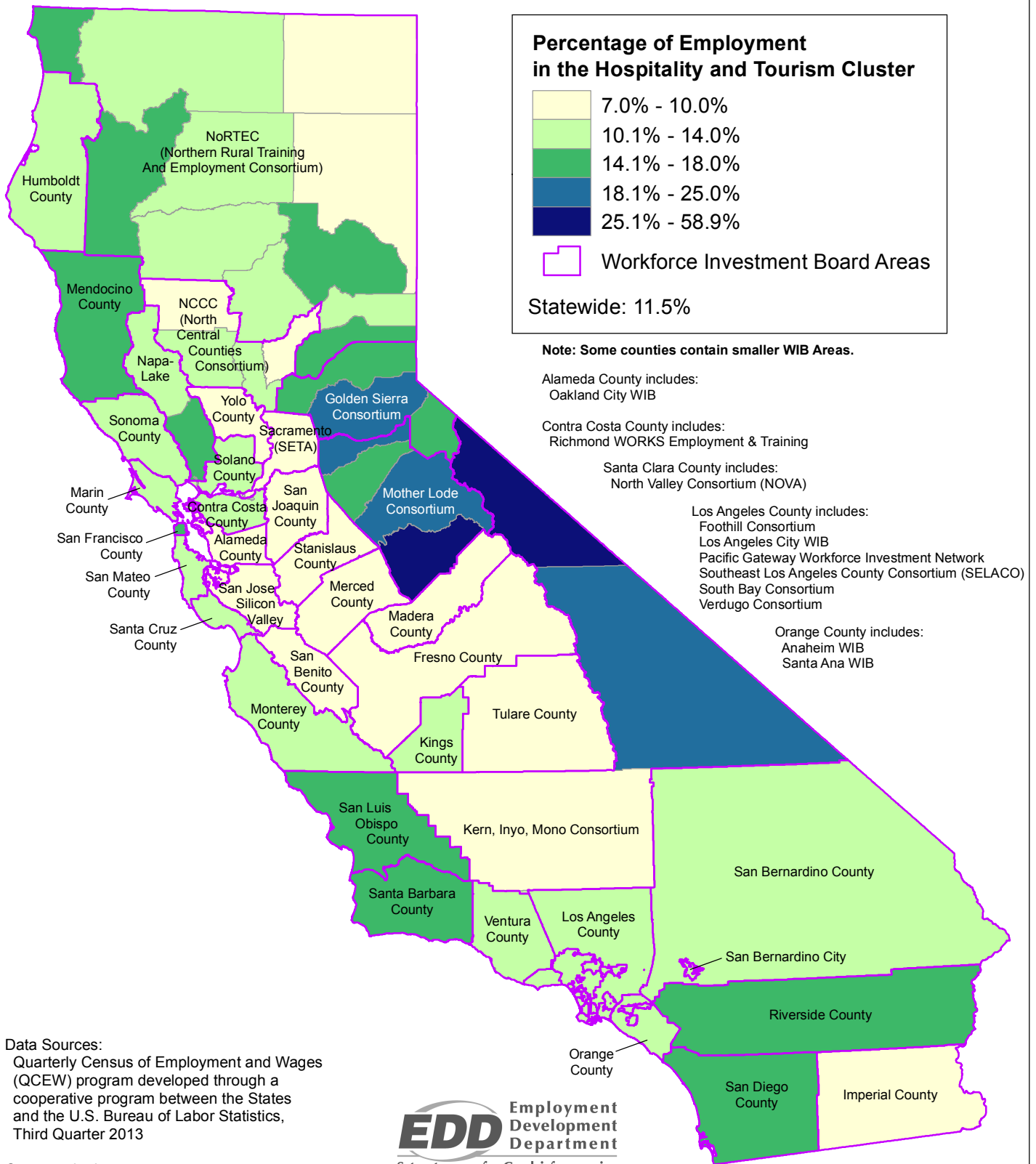
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File T036

California Hospitality and Tourism Cluster

Percentage of Total County Employment, 2013



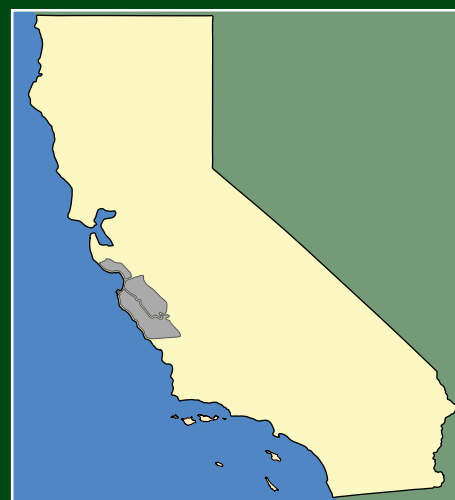
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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Labor Market Information Division
California Employment Development Department
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File T036



Occupational Analysis: Retail Cluster

Coastal Economic Sub-Market
Monterey, San Benito, and Santa Cruz Counties

March 2015

What is the Retail Cluster?

The Retail cluster is composed of 19 industries involved in the sales of goods both familiar and esoteric, everything from groceries and automobiles to musical instruments and surfboards. The workers employed within this cluster span all skill levels and share skills and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Retail Cluster

The graph below identifies the top 10 occupations in the Retail cluster, based on the Coastal Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent three-quarters of the 13,822 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, critical thinking, monitoring, reading comprehension, and speaking.³²



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

³² U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³³ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

³⁴ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Top 10 Occupations and Recent Job Demand in the Retail Cluster

The table below further profiles the Coastal Economic Sub-Market's** top 10 occupations in the Retail cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a recent 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ³⁵ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ³⁶	HWOL Job Ads ³⁷ (120 days)
Cashiers	3,593	\$10.90	\$22,663	Less than high school	198
Retail Salespersons	3,340	\$11.58	\$24,081	Less than high school	661
Stock Clerks and Order Fillers	899	\$12.13	\$25,233	Less than high school	160
First-Line Supervisors of Retail Sales Workers	796	\$19.49	\$40,557	High school diploma or equivalent	472
Combined Food Preparation and Serving Workers, Including Fast Food	420	\$9.36	\$19,478	Less than high school	213
Laborers and Freight, Stock, and Material Movers, Hand	376	\$11.04	\$22,965	Less than high school	99
Packers and Packagers, Hand	252	\$9.39	\$19,546	Less than high school	9
Parts Salespersons	219	\$15.41	\$32,043	Less than high school	18
Automotive Service Technicians and Mechanics	214	\$24.24	\$50,408	High school diploma or equivalent	133
Pharmacy Technicians	174	\$20.55	\$42,740	High school diploma or equivalent	47

Source: California Employment Development Department, *Projections of Employment 2012-2022; Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending period ending February 24, 2015.

³⁵ Total job openings are the sum of new jobs and replacement job openings.

³⁶ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

³⁷ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

** This Economic Sub-Market includes Monterey, San Benito, and Santa Cruz Counties.

Top Occupations for the Retail Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Retail cluster. The table includes the Coastal Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ³⁸ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
Pharmacists	112	\$67.12	\$139,613	46
General and Operations Managers	111	\$45.15	\$93,910	91
Sales Managers	86	\$49.43	\$102,814	79
Accountants and Auditors	36	\$36.08	\$75,038	302
Loan Officers	35	\$34.04	\$70,802	89
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Heavy and Tractor-Trailer Truck Drivers	38	\$20.31	\$42,234	357
First-Line Supervisors of Production and Operating Workers	30	\$28.06	\$58,352	132
Computer, Automated Teller, and Office Machine Repairers	20	\$21.83	\$45,418	3
Electrical and Electronics Installers and Repairers, Transportation Equipment	10	\$26.04	\$54,164	0
Hairdressers, Hairstylists, and Cosmetologists	5	\$12.30	\$25,585	108
Requires a High School Diploma or Equivalent or Less				
Cashiers	3,593	\$10.90	\$22,663	198
Retail Salespersons	3,340	\$11.58	\$24,081	661
Stock Clerks and Order Fillers	899	\$12.13	\$25,233	160
First-Line Supervisors of Retail Sales Workers	796	\$19.49	\$40,557	472
Combined Food Preparation and Serving Workers, Including Fast Food	420	\$9.36	\$19,478	213

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending February 24, 2015.

³⁸ Total job openings are the sum of new jobs and replacement job openings.

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Skill Requirements in the Retail Cluster

The table below lists the 10 top skills required for top occupations in the Retail cluster, categorized by entry-level education requirements. Critical thinking is the most commonly shared skill, followed by speaking, active listening, monitoring, and reading comprehension. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills																			
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Equipment Maintenance	Instruction	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Repairing	Science
Requires a Bachelor's Degree or Higher																				
Pharmacists	•	•			•		•					•						•		•
General and Operations Managers	•	•		•	•					•		•						•		•
Sales Managers				•	•			•		•		•				•				•
Accountants and Auditors ³⁹	•	•			•			•			•	•						•		•
Loan Officers	•	•	•		•			•			•							•		•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Heavy and Tractor-Trailer Truck Drivers		•	•		•	•						•		•	•			•		•
First-Line Supervisors of Production and Operating Workers		•		•	•					•		•						•		•
Computer, Automated Teller, and Office Machine Repairers	•	•			•							•		•	•			•		•
Electrical and Electronics Installers and Repairers, Transportation Equipment		•	•		•	•						•					•	•	•	
Hairdressers, Hairstylists, and Cosmetologists	•	•			•		•		•			•				•			•	•
Requires a High School Diploma or Equivalent or Less																				
Cashiers		•		•	•							•						•		•
Retail Salespersons		•			•							•	•			•		•		•
Stock Clerks and Order Fillers ⁴⁰	•	•	•	•	•							•						•		•
First-Line Supervisors of Retail Sales Workers					•		•			•		•	•			•		•		•
Combined Food Preparation and Serving Workers, Including Fast Food		•		•	•		•		•							•	•		•	•

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³⁹ Skills listed represent Accountants, a specialty occupation of Accountants and Auditors.

⁴⁰ Skills listed represent Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Work Activities in the Retail Cluster

The table below lists the 10 top work activities required for top occupations in the Retail cluster, categorized by entry-level education requirements. The most common include establishing and maintaining interpersonal relationships; communicating with supervisors, peers, or subordinates; and organizing, planning, and prioritizing work.

Occupations	Work Activities																																	
	Analyzing Data or Information	Assisting and Caring for Others	Coaching and Developing Others	Communicating with Persons Outside Organization	Communicating with Supervisors, Peers, or Subordinates	Controlling Machines and Processes	Coordinating the Work and Activities of Others	Establishing and Maintaining Interpersonal Relationships	Evaluating Information to Determine Compliance with Standards	Getting Information	Guiding, Directing, and Motivating Subordinates	Handling and Moving Objects	Identifying Objects, Actions, and Events	Inspecting Equipment, Structures, or Material	Interacting With Computers	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Operating Vehicles, Mechanized Devices, or Equipment	Organizing, Planning, and Prioritizing Work	Performing Administrative Activities	Performing for or Working Directly with the Public	Performing General Physical Activities	Processing Information	Provide Consultation and Advice to Others	Repairing and Maintaining Electronic Equipment	Repairing and Maintaining Mechanical Equipment	Resolving Conflicts and Negotiating with Others	Scheduling Work and Activities	Selling or Influencing Others	Thinking Creatively	Training and Teaching Others	Updating and Using Relevant Knowledge	
Requires a Bachelor's Degree or Higher																																		
Pharmacists	●	●						●	●				●				●			●		●		●									●	
General and Operations Managers				●	●		●	●								●	●	●		●								●	●		●			
Sales Managers			●	●	●		●	●			●					●				●								●		●				
Accountants and Auditors ⁴¹	●				●			●	●	●						●				●	●		●										●	
Loan Officers				●				●	●	●						●				●		●		●	●			●					●	
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																																		
Heavy and Tractor-Trailer Truck Drivers					●		●	●	●		●	●	●		●			●	●			●												
First-Line Supervisors of Production and Operating Workers			●		●	●	●	●			●	●												●				●	●					
Computer, Automated Teller, and Office Machine Repairers				●			●						●		●				●							●	●				●		●	
Electrical and Electronics Installers and Repairers, Transportation Equipment				●			●		●		●					●						●	●		●	●							●	
Hairdressers, Hairstylists, and Cosmetologists		●	●				●		●		●									●	●		●								●		●	
Requires a High School Diploma or Equivalent or Less																																		
Cashiers				●	●		●		●		●					●					●	●						●	●					
Retail Salespersons				●	●		●					●				●				●	●									●	●		●	
Stock Clerks and Order Fillers ⁴²				●	●		●					●	●							●	●	●										●	●	
First-Line Supervisors of Retail Sales Workers			●		●		●		●		●					●				●	●							●	●					
Combined Food Preparation and Serving Workers, Including Fast Food			●		●		●	●	●		●	●									●							●				●		

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

⁴¹ Work Activities listed represent Accountants, a specialty occupation of Accountants and Auditors.

⁴² Work Activities listed represent Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Related Occupations for the Retail Cluster

The table below lists top occupations in the Retail cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Retail cluster occupations.

Retail Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
Pharmacists	<ul style="list-style-type: none"> Health Specialties Teachers, Postsecondary Medical Scientists, Except Epidemiologists Nursing Instructors and Teachers, Postsecondary
General and Operations Managers	<ul style="list-style-type: none"> First-Line Supervisors of Office and Administrative Support Workers Logistics Managers Storage and Distribution Managers
Sales Managers	<ul style="list-style-type: none"> Financial Managers, Branch or Department Marketing Managers Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Accountants and Auditors	<ul style="list-style-type: none"> Bookkeeping, Accounting, and Auditing Clerks Financial Analysts Personal Financial Advisors
Loan Officers	<ul style="list-style-type: none"> Insurance Sales Agents Personal Financial Advisors Sales Agents, Financial Services
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Heavy and Tractor-Trailer Truck Drivers	<ul style="list-style-type: none"> Light Truck or Delivery Services Drivers Pile-Driver Operators Service Unit Operators, Oil, Gas, and Mining
First-Line Supervisors of Production and Operating Workers	<ul style="list-style-type: none"> First-Line Supervisors of Construction Trades and Extraction Workers First-Line Supervisors of Mechanics, Installers, and Repairers Non-Destructive Testing Specialists
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> Computer User Support Specialists Electrical Engineering Technicians Home Appliance Repairers
Electrical and Electronics Installers and Repairers, Transportation Equipment	<ul style="list-style-type: none"> Electrical and Electronics Repairers, Commercial and Industrial Equipment Manufacturing Production Technicians Stationary Engineers and Boiler Operators
Hairdressers, Hairstylists, and Cosmetologists	<ul style="list-style-type: none"> Dental Assistants Massage Therapists Skincare Specialists
Requires a High School Diploma or Equivalent or Less	
Cashiers	<ul style="list-style-type: none"> Combined Food Preparation and Serving Workers, Including Fast Food Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop Waiters and Waitresses
Retail Salespersons	<ul style="list-style-type: none"> Bartenders Hotel, Motel, and Resort Desk Clerks Tellers
Stock Clerks and Order Fillers	<ul style="list-style-type: none"> Food Servers, Nonrestaurant Marking Clerks Stock Clerks- Stockroom, Warehouse, or Storage Yard
First-Line Supervisors of Retail Sales Workers	<ul style="list-style-type: none"> Dispatchers, Except Police, Fire, and Ambulance First-Line Supervisors of Food Preparation and Serving Workers Wholesale and Retail Buyers, Except Farm Products
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> Amusement and Recreation Attendants Cooks, Fast Food Counter Attendants, Cafeteria, Food Concession, and Coffee Shop

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Retail Cluster

The following table lists the Coastal Economic Sub-Market** employers in the Retail cluster who posted the most job advertisements during the 120-day period ending February 24, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day period.

Retail Cluster Employers	Recent Job Advertisements ⁴³ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Safeway Companies	109	9	100	1,111.1%
Macy's	80	60	20	33.3%
Sears Holdings Corporation	56	98	-42	-42.9%
Dollar Tree Stores, Inc.	52	12	40	333.3%
Target Corporation	42	18	24	133.3%
Home Depot	41	11	30	272.7%
Whole Foods	40	43	-3	-7.0%
Rite Aid	26	13	13	100.0%
Goodwill Industries	24	21	3	14.3%
Ross Stores	18	1	17	1,700.0%
Toys"R"Us	17	33	-16	-48.5%
Office Depot	16	11	5	45.5%
Staples	10	15	-5	-33.3%
Big Creek Lumber Company	9	10	-1	-10.0%
Market America	8	3	5	166.7%
Lithia Motors, Inc.	7	2	5	250.0%
T-Mobile	6	11	-5	-45.5%
Gap Inc.	6	4	2	50.0%
Calla Co.	6	2	4	200.0%
Constellation Brands Inc.	6	0	6	—

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending February 24, 2015.

⁴³ Totals do not include employers with anonymous job advertisements.

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Instructional Programs for the Retail Cluster Occupations

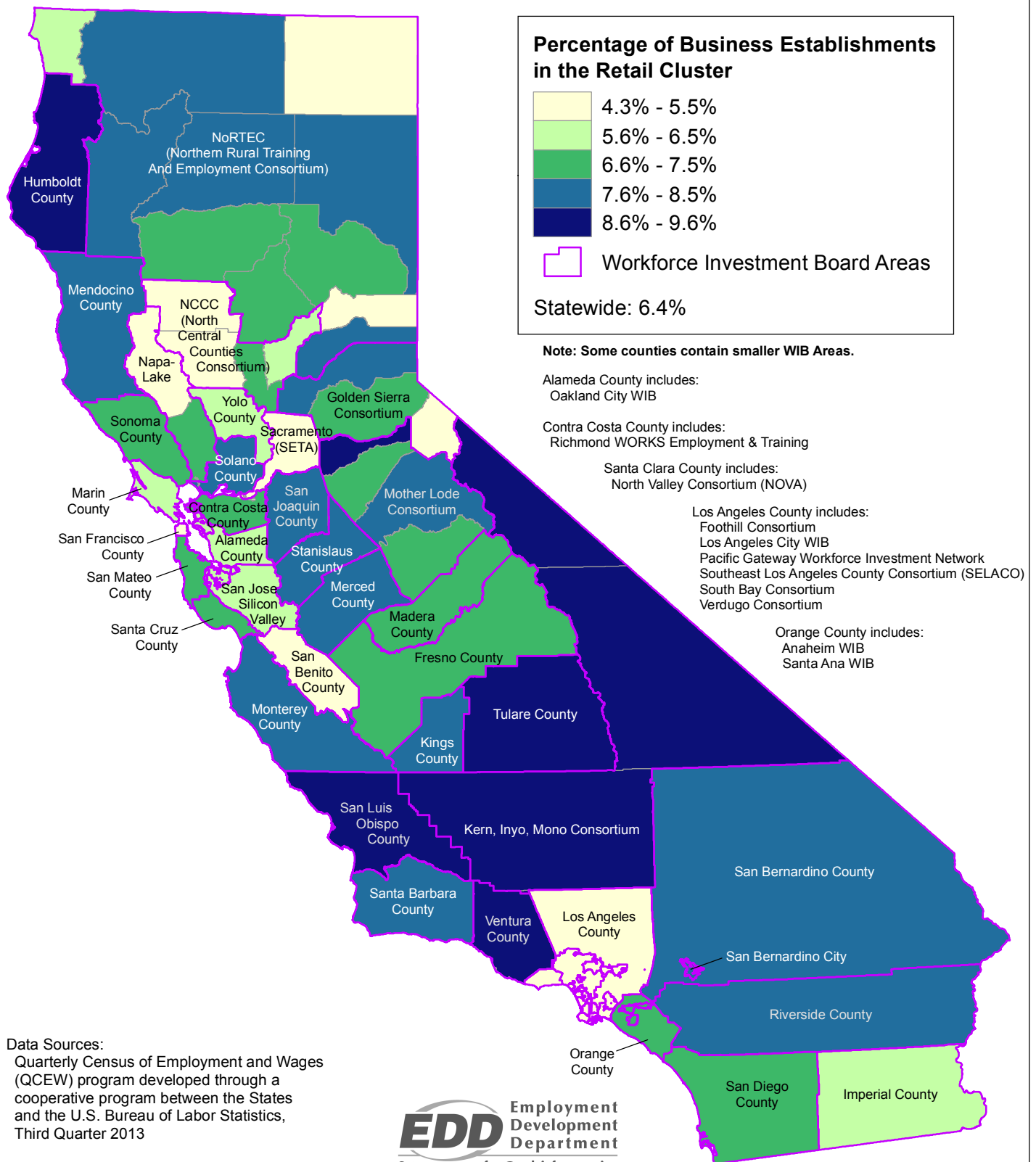
The table below provides examples of instructional programs related to some of the top occupations in the Retail cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Retail cluster. To view a more complete list of training programs, select the source links under the table below. The Taxonomy of Programs categorizes and describes instructional programs only for California Community Colleges.

Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Heavy and Tractor-Trailer Truck Drivers	49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	094750	Truck and Bus Driving
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A
Computer, Automated Teller, and Office Machine Repairers	47.0102 47.0104	Business Machine Repair Computer Installation and Repair Technology/Technician	093410	Computer Electronics
Electrical and Electronics Installers and Repairers, Transportation Equipment	47.0604	Automobile/Automotive Mechanics Technology/Technician	094800	Automotive Technology
Hairdressers, Hairstylists, and Cosmetologists	12.0401	Cosmetology/Cosmetologist, General	300700	Cosmetology and Barbering
	12.0404	Electrolysis/Electrology and Electrolysis Technician		
	12.0406	Make-Up Artist/Specialist		
First-Line Supervisors of Retail Sales Workers	52.0212	Retail Management	010920	Floriculture /Floristry
	52.1803	Retailing and Retail Operations	050650	Retail Store Operations and Management
	52.1804	Selling Skills and Sales Operations	050940	Sales and Salesmanship

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](http://www.nces.ed.gov/ipeds) at www.nces.ed.gov; [California Community Colleges TOP-to-CIP Crosswalk](http://www.cccco.edu) 7th Edition (2010), www.cccco.edu.

California Retail Cluster

Percentage of Total County Establishments, 2013



Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

Cartography by:
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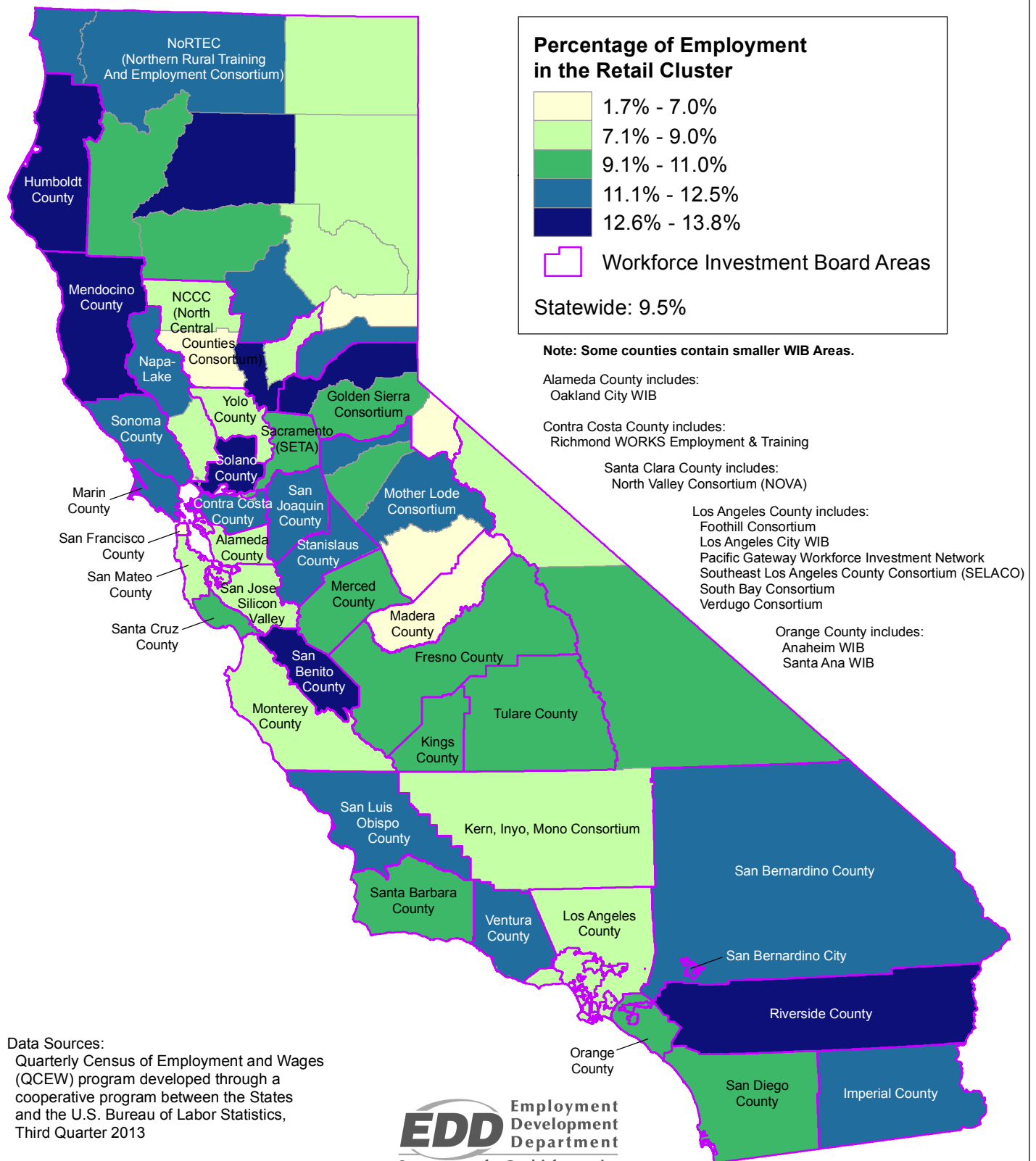
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California Retail Cluster

Percentage of Total County Employment, 2013



Data Sources:
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