** Viticulture, Enology and Wine Business Occupations**

**Labor Market Information Report**

**Cabrillo College**

Prepared by the San Francisco Bay Center of Excellence

for Labor Market Research

March 2019

# Recommendation

Based on all available data, there appears to be a significant undersupply of Viticulture, Enology and Wine Business workers compared to the demand for this cluster of occupations in the Bay region and in the SC-Monterey sub-region (Monterey, San Benito, and Santa Cruz Counties). There is a projected annual gap of about 19,524 students in the Bay region and 1,589 students in the SC-Monterey Sub-Region. Even if the demand for Waiters and Waitresses is removed from the demand calculation, there is still an undersupply of students in both the region and sub-region to fill the annual openings for Food Service Managers and Bartenders.

This report also provides student outcomes data on employment and earnings for programs on TOP 0104.00 - Viticulture, Enology, and Wine Business in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at colleges in the state and region, as well as to outcomes across all CTE programs at Cabrillo College and in the region.

# Introduction

This report profiles Viticulture, Enology and Wine Business Occupations in the 12 county Bay region and in the SC-Monterey sub-region for a proposed new program at Cabrillo College. It is important to note that there is a large number of annual openings for waiters and waitresses in the region and sub-region, however not all of these openings are in wine focused establishments that require knowledge, skills and abilities related to viticulture, enology and the wine business. Therefore, not all of the demand for waiters and waitresses should be considered as it relates to the proposed new program.

|  |
| --- |
| * **Food Service Managers (SOC 11-9051)**: Plan, direct, or coordinate activities of an organization or department that serves food and beverages. Excludes “Chefs and Head Cooks” (35-1011). |
| *Entry-Level Educational Requirement: High school diploma or equivalent* |
| *Training Requirement: None* |
| *Percentage of Community College Award Holders or Some Postsecondary Coursework: 37%* |
|  |
| * **Waiters and Waitresses (SOC 35-3031):** Take orders and serve food and beverages to patrons at tables in dining establishment. Excludes "Counter Attendants, Cafeteria, Food Concession, and Coffee Shop" (35-3022). |
| Entry-Level Educational Requirement: No *formal educational credential* |
| Training Requirement: Short-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 39*%* |
|  |
| * **Bartenders (SOC 35-3011):** Mix and serve drinks to patrons, directly or through waitstaff. |
| Entry-Level Educational Requirement: No *formal educational credential* |
| Training Requirement: Short-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 45*%* |

# Occupational Demand

**Table 1. Employment Outlook for Viticulture, Enology & Wine Business Occupations in Bay Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2017 Jobs | 2022 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Open-ings | Average Annual Open-ings | 10% Hourly Wage | Median Hourly Wage |
| Food Service Managers | 12,455 | 13,215 | 760 | 6% | 7,496 | 1,499 | $11.30 | $18.41 |
| Waiters and Waitresses | 72,451 | 77,177 | 4,726 | 7% | 74,362 | 14,872 | $10.64 | $13.60 |
| Bartenders | 17,624 | 18,847 | 1,223 | 7% | 16,019 | 3,204 | $11.19 | $14.40 |
| **Total** | **102,530** | **109,239** | **6,709** | **7%** | **97,877** | **19,575** | **$10.75** | **$13.76** |

*Source: EMSI 2019.1*

**Bay Region** includes Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties

**Table 2. Employment Outlook for Viticulture, Enology & Wine Business Occupations in SC-Monterey Sub-Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2017 Jobs | 2022 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Open-ings | Average Annual Open-ings | 10% Hourly Wage | Median Hourly Wage |
| Food Service Managers | 897 | 945 | 48 | 5% | 530 | 106 | $11.20 | $20.13 |
| Waiters and Waitresses | 6,106 | 6,472 | 366 | 6% | 6,224 | 1,245 | $10.50 | $12.47 |
| Bartenders | 1,315 | 1,400 | 85 | 6% | 1,189 | 238 | $10.52 | $12.93 |
| **TOTAL** | **8,318** | **8,817** | **499** | **6%** | **7,943** | **1,589** | **$10.50** | **$12.55** |

*Source: EMSI 2019.1*

**SC-Monterey Sub-Region** includes Monterey, San Benito, and Santa Cruz Counties

### Job Postings in Bay Region and SC-Monterey Sub-Region

**Table 3. Number of Job Postings by Occupation for latest 12 months (March 2018 - Feb 2019)**

| Occupation | Bay Region | Tri-Counties | SC-Monterey |
| --- | --- | --- | --- |
| Food Service Managers (11-9051.00) | 9,279 | 2,753 | 345 |
| Waiters and Waitresses (35-3031.00) | 8,538 | 2,543 | 308 |
| Bartenders (35-3011.00) | 2,845 | 828 | 98 |
| **Total** | **20,662** | **6,124** | **751** |

*Source: Burning Glass*

**Table 4. Top Job Titles for Viticulture, Enology & Wine Business Occupations for latest 12 months (March 2018 - Feb 2019)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Common Title | Bay | Tri-Counties | SC-Monterey | Common Title | Bay | Tri-Counties | SC-Monterey |
| Bartender | 2,807 | 813 | 101 | Bar Manager | 282 | 64 | 15 |
| Server | 2,155 | 665 | 81 | Cocktail Server | 211 | 50 | 4 |
| Restaurant Manager | 1,515 | 537 | 34 | Shift Manager | 205 | 65 | 25 |
| Assistant Manager | 1,415 | 418 | 43 | Servers | 185 | 57 | 81 |
| General Manager | 1,002 | 268 | 35 | Event Server | 178 | 33 | 13 |
| Wait Staff | 850 | 286 | 16 | Busser | 156 | 35 | 5 |
| Restaurant General Mgr | 638 | 195 | 11 | Service Manager | 154 | 39 | 3 |
| Food Runner | 611 | 181 | 12 | Food Service Manager | 143 | 32 | 8 |
| Restaurant Server | 562 | 161 | 35 | Host/Hostess | 141 | 30 | 4 |
| Banquet Server | 372 | 136 | 38 | Cafe Manager | 127 | 34 | 2 |
| Manager | 351 | 78 | 0 | Chef Manager | 124 | 34 | 1 |
| Food Server | 341 | 89 | 8 | Cashier | 120 | 19 | 1 |
| Kitchen Manager | 332 | 115 | 9 | Food and Beverage Mgr | 114 | 32 | 5 |
| Assistant Restaurant Mgr | 295 | 100 | 24 | Manager, Food Service Industry | 107 | 22 | 1 |

*Source: Burning Glass*

# Industry Concentration

**Table 5. Industries hiring Viticulture, Enology & Wine Business Workers in Bay Region**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Industry – 6 Digit NAICS (No. American Industry Classification) Codes | Jobs in Industry (2017) | Jobs in Industry (2022) | % Change (2017-22) | % in Industry (2017) |
| Full-Service Restaurants (722511) | 67,080 | 66,827 | 5% | 65.0% |
| Drinking Places (Alcoholic Beverages) (722410) | 6,089 | 6,065 | 8% | 5.9% |
| Hotels (except Casino Hotels) and Motels (721110) | 5,784 | 5,828 | 2% | 5.7% |
| Limited-Service Restaurants (722513) | 4,620 | 4,648 | 7% | 4.5% |
| Food Service Contractors (722310) | 3,327 | 3,457 | 15% | 3.4% |
| Caterers (722320) | 2,716 | 2,808 | 17% | 2.7% |
| Snack and Nonalcoholic Beverage Bars (722515) | 1,579 | 1,619 | 17% | 1.6% |
| Civic and Social Organizations (813410) | 1,350 | 1,347 | 4% | 1.3% |
| Wineries (312130) | 1,271 | 1,291 | 7% | 1.3% |

*Source: EMSI 2019.1*

**Table 6. Top Employers Posting Viticulture, Enology & Wine Business Occupations in Bay Region and SC-Monterey Sub-Region (March 2018 - Feb 2019)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employer | Bay | Employer | Tri-Counties | Employer | SC-Monterey |
| Marriott International Inc | 940 | Marriott International Inc | 256 | Marriott International Inc | 256 |
| Pared | 698 | Chipotle Mexican Grill | 123 | Chipotle Mexican Grill | 123 |
| Chipotle Mexican Grill | 383 | Pared | 121 | Pared | 121 |
| Hilton Hotel Corporation | 273 | Hyatt | 108 | Hyatt | 108 |
| McDonald's | 222 | Hilton Hotel Corporation | 106 | Hilton Hotel Corporation | 106 |
| Aramark | 210 | Compass Group | 105 | Compass Group | 105 |
| Pizza Hut | 205 | Aramark | 93 | Aramark | 93 |
| Hyatt | 183 | Red Robin | 62 | Red Robin | 62 |
| Sodexo | 169 | McDonald's | 60 | McDonald's | 60 |
| Compass Group | 167 | Pizza Hut | 57 | Pizza Hut | 57 |
| Bjs Restaurants Inc | 144 | Denny's | 50 | Denny's | 50 |
| Applebee's Neighborhood Grill & Bar | 140 | Red Robin Gourmet Burgers | 48 | Red Robin Gourmet Burgers | 48 |
| Taco Bell | 134 | P.F. Chang's | 47 | P.F. Chang's | 47 |
| Panda Express | 130 | Chili's | 45 | Chili's | 45 |
| Red Robin | 128 | Compass Group Plc United States | 43 | Compass Group Plc United States | 43 |
| Interstate Hotels & Resorts | 120 | Destination Hotels & Resorts | 42 | Destination Hotels & Resorts | 42 |
| Compass Group Plc United States | 113 | Burger King | 38 | Burger King | 38 |
| Red Robin Gourmet Burgers | 95 | Sodexo | 38 | Sodexo | 38 |
| Denny's | 94 | Panda Express | 37 | Panda Express | 37 |
| P.F. Chang's | 93 | Bjs Restaurants Inc | 34 | Bjs Restaurants Inc | 34 |
| Chili's | 89 | The Counter Burgers | 34 | The Counter Burgers | 34 |
| Burger King | 88 | Fairmont Hotels & Resorts | 31 | Fairmont Hotels & Resorts | 31 |
| Domino's Pizza | 82 | Bpr Properties | 30 | Bpr Properties | 30 |

*Source: Burning Glass*

# Educational Supply

There are three community colleges in the Bay Region issuing 51 awards on average annually (last 3 years) on TOP 0104.00 - Viticulture, Enology, and Wine Business. There are no colleges in the SC-Monterey Sub-Region issuing awards on this TOP code.

**Table 7. Awards on TOP 0104.00 - Viticulture, Enology, and Wine Business in the Bay Region**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| College | Sub-Region | Headcount | Associates | Certificates | Total |
| Foothill | Silicon Valley | 40 |  |  |  |
| Las Positas | East Bay | 91 | 4 |  | 4 |
| Napa | North Bay | 398 | 16 | 8 | 24 |
| Santa Rosa | North Bay | 230 | 17 | 6 | 23 |
| **Total Bay Region** | | **759** | **37** | **14** | **51** |
| **Total SC-Monterey Sub-Region** | | **0** | **0** | **0** | **0** |

# *Source: IPEDS, Data Mart and Launchboard*

NOTE: Headcount of students who took one or more courses is for 2016-17. The annual average for awards is 2014-17 unless there are only awards in 2016-17. The annual average for other postsecondary is for 2013-16.

# Gap Analysis

Based on the data included in this report, there is a large labor market gap in the Bay region with 19,575 annual openings for the Viticulture, Enology and Wine Business occupational cluster and 51 annual (3-year average) awards for an annual undersupply of 19,524 students. In the SC-Monterey Sub-Region, there is also a gap with 1,589 annual openings and no annual (3-year average) awards, for an annual undersupply of 1,589 students.

It is important to note that there is a large number of annual openings for waiters and waitresses in the region and sub-region, however not all of these openings are in wine focused establishments that require knowledge, skills and abilities related to viticulture, enology and the wine business. Therefore, not all of the demand for waiters and waitresses should be considered as it relates to the proposed new program. However, even if the demand for waiters and waitresses is removed from the demand calculation, there is still an undersupply of students in both the region and sub-region to fill the annual openings for Food Service Managers and Bartenders.

# Student Outcomes

**Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 0104.00 - Viticulture, Enology, and Wine Business**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 2015-16 | Bay  (All CTE Programs) | Cabrillo College (All CTE Programs) | State (0104.00) | Bay (0104.00) | SC-Monterey (0104.00) | Cabrillo College (0104.00) |
| % Employed Four Quarters After Exit | 74% | 69% | 65% | 67% | n/a | n/a |
| Median Quarterly Earnings Two Quarters After Exit | $10,550 | $10,272 | $10,386 | $11,228 | n/a | n/a |
| Median % Change in Earnings | 46% | 55% | 37% | 46% | n/a | n/a |
| % of Students Earning a Living Wage | 63% | 60% | 69% | 66% | n/a | n/a |

*Source: Launchboard Pipeline (version available on 3/25/19)*

# Skills, Certifications and Education

**Table 9. Top Skills for Viticulture, Enology & Wine Business Occupations in Bay Region (March 2018 - Feb 2019)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Skill | Postings | Skill | Postings | Skill | Postings |
| Restaurant Management | 3,728 | Point of Sale System | 1,168 | Inventory Management | 499 |
| Bartending | 3,507 | Sales | 1,087 | Food Service Industry Knowledge | 494 |
| Scheduling | 2,983 | Basic Mathematics | 1,082 | Hospitality Industry Knowledge | 488 |
| Customer Service | 2,647 | Lifting Ability | 1,021 | Upselling Products and Services | 475 |
| Guest Services | 2,351 | Retail Industry Knowledge | 992 | Product Sales | 466 |
| Budgeting | 2,187 | Food Preparation | 932 | Repair | 455 |
| Food Safety | 2,018 | Restaurant Operations | 870 | Asset Protection | 438 |
| Cleaning | 1,917 | Safety Training | 829 | Inventory Control | 413 |
| Cost Control | 1,831 | Food Delivery | 760 | Teaching | 382 |
| Cash Handling | 1,658 | Supervisory Skills | 688 | Conflict Management | 352 |
| Staff Management | 1,546 | Quality Management | 673 | Training Programs | 347 |
| Restaurant Experience | 1,534 | Customer Contact | 662 | Accounting | 344 |
| Food Service Experience | 1,375 | Purchasing | 594 | Administrative Functions | 343 |
| Customer Checkout | 1,225 | Performance Analysis | 516 | Store Management | 335 |
| Cooking | 1,192 | Performance Appraisals | 505 | Hazard Analysis Critical Control Point (HACCP) | 318 |

*Source: Burning Glass*

**Table 10. Certifications for Viticulture, Enology & Wine Business Occupations in the Bay Region (March 2018 - Feb 2019)**

Note: 82% of records have been excluded because they do not include a certification. As a result, the chart below may not be representative of the full sample.

|  |  |  |  |
| --- | --- | --- | --- |
| Certification | Postings | Certification | Postings |
| ServSafe | 1,562 | Security Clearance | 8 |
| Food Handler Certification | 1,134 | Casino Gaming License | 7 |
| Driver's License | 904 | Certified Food Protection Professional | 6 |
| Food Service Certification | 438 | CompTIA Server+ | 6 |
| Training For Intervention Procedures (TIPS) Certification | 235 | Basic Life Saving (BLS) | 5 |
| Alcohol Server Certification | 115 | Global Food Safety Initiative (GFSI) | 5 |
| Alcohol Awareness Certification | 100 | Six Sigma Black Belt Certification | 5 |
| Certified Dietary Manager | 89 | Basic Management Training (BMT) | 4 |
| Registered Dietitian | 63 | Certified A+ Technician | 4 |
| First Aid Cpr Aed | 39 | Certified Health Education Specialist | 4 |
| Food Safety Manager Certification | 27 | Certified Sous Chef | 4 |
| Leadership In Energy And Environmental Design (LEED) Certified | 21 | Certified Swing Manager | 4 |
| Cash Handling Certification | 17 | Hazard Analysis and Critical Control Point (HACCP) Certification | 4 |
| Alcohol Safety | 16 | Project Management Certification | 4 |

*Source: Burning Glass*

**Table 11. Education Requirements for Viticulture, Enology & Wine Business Occupations in Bay Region**

Note: 76% of records have been excluded because they do not include a degree level. As a result, the chart below may not be representative of the full sample.

|  |  |
| --- | --- |
| Education (minimum advertised) | Latest 12 Mos. Postings |
| High school or vocational training | 3,403 (70%) |
| Associate Degree | 371 (7%) |
| Bachelor’s Degree or Higher | 1,108 (23%) |

*Source: Burning Glass*

# Methodology

Occupations for this report were identified by use of skills listed in O\*Net descriptions and job descriptions in Burning Glass. Labor demand data is sourced from Economic Modeling Specialists International (EMSI) occupation data and Burning Glass job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CTE Launchboard and CCCCO Data Mart.

# Sources

O\*Net Online

Labor Insight/Jobs (Burning Glass)

Economic Modeling Specialists International (EMSI)

CTE LaunchBoard [www.calpassplus.org/Launchboard/](http://www.calpassplus.org/Launchboard/)

Statewide CTE Outcomes Survey

Employment Development Department Unemployment Insurance Dataset

Living Insight Center for Community Economic Development

Chancellor’s Office MIS system

# Contacts

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