**** **Environmental Landscaping Occupations**

**Labor Market Information Report**

Prepared by the San Francisco Bay Center of Excellence

for Labor Market Research

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# Recommendation

Based on all available data, there appears to be a significant undersupply of Landscaping workers compared to the demand for this cluster of occupations in the Bay region and in the North Bay sub-region (Marin, Napa, Solano, and Sonoma counties). The annual gap is 5,420 students annually in the Bay region and about 1,080 in the North Bay.

This report also provides student outcomes data on employment and earnings for programs on TOP 0109.10 - Landscape Design and Maintenance in the state and region. It is recommended that this 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 College of Marin and in the region.

# Introduction

This report profiles Environmental Landscaping Occupations in the 12 county Bay region and in the North Bay sub-region for a proposed new degree program at College of Marin.

|  |
| --- |
| * **First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers (SOC 37-1012):** Directly supervise and coordinate activities of workers engaged in landscaping or groundskeeping activities. Work may involve reviewing contracts to ascertain service, machine, and workforce requirements; answering inquiries from potential customers regarding methods, material, and price ranges; and preparing estimates according to labor, material, and machine costs. |
| *Entry-Level Educational Requirement: No formal educational credential* |
| *Training Requirement: None* |
| *Percentage of Community College Award Holders or Some Postsecondary Coursework: 34%* |
|  |
| * **Landscaping and Groundskeeping Workers (SOC 37-3011):** Landscape or maintain grounds of property using hand or power tools or equipment. Workers typically perform a variety of tasks, which may include any combination of the following: sod laying, mowing, trimming, planting, watering, fertilizing, digging, raking, sprinkler installation, and installation of mortarless segmental concrete masonry wall units. |
| *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: 19%* |
|  |
| * **Pesticide Handlers, Sprayers, and Applicators, Vegetation (SOC 37-3012):** Mix or apply pesticides, herbicides, fungicides, or insecticides through sprays, dusts, vapors, soil incorporation, or chemical application on trees, shrubs, lawns, or botanical crops. Usually requires specific training and State or Federal certification. |
| *Entry-Level Educational Requirement: High school diploma or equivalent* |
| *Training Requirement: Moderate-term on-the-job training* |
| *Percentage of Community College Award Holders or Some Postsecondary Coursework: 19%* |

# Occupational Demand

**Table 1. Employment Outlook for Environmental Landscaping Occupations in Bay Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2017 Jobs | 2022 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Openings | Annual Openings | 10% Hourly Wage | Median Hourly Wage |
| First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers | 4,126 | 4,252 | 126 | 3% | 2,124 | 425 | $13.32 | $17.59 |
| Landscaping and Groundskeeping Workers | 37,559 | 39,432 | 1,872 | 5% | 24,618 | 4,924 | $10.58 | $13.25 |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation | 1,125 | 1,197 | 72 | 6% | 756 | 151 | $12.86 | $18.74 |
| **Total** | **42,811** | **44,880** | **2,070** | **5%** | **27,498** | **5,500** | **$10.91** | **$13.81** |

*Source: EMSI 2018.2*

**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 Environmental Landscaping Occupations in North Bay Sub-Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2017 Jobs | 2022 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Openings | Annual Openings | 10% Hourly Wage | Median Hourly Wage |
| First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers | 959 | 977 | 18 | 2% | 480 | 96 | $14.05 | $16.47 |
| Landscaping and Groundskeeping Workers | 7,604 | 7,864 | 260 | 3% | 4,838 | 968 | $12.35 | $13.65 |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation | 191 | 203 | 13 | 7% | 129 | 26 | $14.69 | $16.19 |
| **TOTAL** | **8,754** | **9,044** | **290** | **3%** | **5,447** | **1,089** | **$12.59** | **$14.02** |

*Source: EMSI 2018.2*

**North Bay Sub-Region** includes Marin, Napa, Solano, and Sonoma counties

### Job Postings in Bay Region and North Bay Sub-Region

**Table 3. Number of Job Postings by Occupation for latest 12 months (May 2017 - April 2018)**

|  |  |  |
| --- | --- | --- |
| Occupation | Bay | North Bay |
| Landscaping and Groundskeeping Workers (37-3011.00) | 704 | 152 |
| First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers (37-1012.00) | 51 | 10 |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation (37-3012.00) | 14 | 0 |
| **Total** | **769** | **162** |

*Source: Burning Glass*

**Table 4. Top Job Titles for Environmental Landscaping Occupations for latest 12 months (May 2017 - April 2018)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Common Title | Bay | North Bay | Common Title | Bay | North Bay |
| Groundskeeper | 225 | 59 | Maintenance Worker | 21 | 2 |
| Gardener | 123 | 12 | Groundsman | 18 | 0 |
| Landscaper | 60 | 18 | Greenskeeper | 16 | 0 |
| Irrigation Technician | 35 | 9 | Landscape Labourer | 16 | 4 |
| Grounds Worker | 28 | 4 | Landscaping Crew Leader | 9 | 2 |

*Source: Burning Glass*

# Industry Concentration

**Table 5. Industries hiring Environmental Landscaping 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)** |
| Landscaping Services (561730) | 27,849 | 28,773 | 3% | 65.1% |
| Local Government, Excluding Education and Hospitals (903999) | 2,964 | 3,132 | 6% | 6.9% |
| Golf Courses and Country Clubs (713910) | 1,088 | 1,125 | 3% | 2.5% |
| All Other Amusement and Recreation Industries (713990) | 592 | 656 | 11% | 1.4% |
| Colleges, Universities & Professional Schools (State Government) (902612) | 589 | 668 | 13% | 1.4% |
| Hotels (except Casino Hotels) and Motels (721110) | 582 | 613 | 5% | 1.4% |
| Crop Production (111000) | 557 | 562 | 1% | 1.3% |
| Colleges, Universities, and Professional Schools (611310) | 540 | 613 | 14% | 1.3% |

*Source: EMSI 2018.2*

**Table 6. Top Employers Posting Environmental Landscaping Occupations in Bay and North Bay (May 2017 - April 2018)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Employer** | **Bay** | **Employer** | **North Bay** |
| Brightview | 23 | Landcare | 11 |
| Landcare | 20 | Wyndham Worldwide | 8 |
| Brightview Landscapes | 18 | Pride Industried | 8 |
| Fairfield Residential | 16 | College of Marin | 4 |
| Greystar Management Services | 14 | Skyview Memorial Lawn | 4 |
| University California | 14 | Wyndham Vacation Resorts Asia Pacific | 4 |

*Source: Burning Glass*

# Educational Supply

There are seven colleges in the Bay Region issuing 80 awards annually on TOP 0109.10 - Landscape Design and Maintenance. Two of these colleges are in the North Bay sub-region, issuing 10 awards annually.

**Table 7. Awards on TOP 0109.10 - Landscape Design and Maintenance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| College | Sub-Region | Headcount | Associates | Certificates | Total |
| Cabrillo | SC Monterey | on another TOP | 3 | 9 | 12 |
| Diablo Valley | East Bay | 26 | 0 | 2 | 2 |
| Las Positas | East Bay | 12 | 1 | 0 | 1 |
| Marin | North Bay | on another TOP | 1 | 1 | 2 |
| Merritt | East Bay | 267 | 15 | 23 | 38 |
| Monterey | SC Monterey | 20 | 0 | 0 | 0 |
| Napa | North Bay | 11 | 0 | 0 | 0 |
| San Francisco | Mid-Peninsula | 94 | 2 | 15 | 17 |
| Santa Rosa | North Bay | 64 | 4 | 4 | 8 |
| **Total Bay Region** | | **493** | **25** | **54** | **80** |
| **Total North Bay Sub-Region** | | **76** | **5** | **5** | **10** |

# *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.

# Gap Analysis

Based on the data included in this report, there is a large labor market gap in the Bay region with 5,500 annual openings for the Environmental Landscaping occupational cluster and 80 annual awards for an annual undersupply of 5,420. In the North Bay, there is also a gap with 1,089 annual openings and 10 annual awards for an annual undersupply of 1,079.

# Student Outcomes

**Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 0109.10 - Landscape Design and Maintenance**

Note: Data is not available on TOP 0109.10 for College of Marin since there are very few students taking courses on this TOP code.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **2015-16** | **Bay  (All CTE Programs)** | **Marin**  **(All CTE Programs)** | **State (010910)** | **Bay (010910)** | **North Bay (010910)** | **Top College on 010910 in the region** | |
| % Employed Four Quarters After Exit | 74% | 65% | 53% | 47% | 56% | Santa Rosa | 52%  (13 out of 25 students) |
| Median Earnings Two Quarters After Exit | $10,310 | $9,635 | $6,865 | $6,865 | $4,850 | Merritt | $11,875  (no of students n/a) |
| Median % Change in Earnings | 46% | 34% | 71% | 27% | 35% | Merritt | 21%  (38 students) |
| % of Students Earning a Living Wage | 63% | 61% | 50% | 53% | 40% | Merritt | 56%  (23 out of 41 students) |

*Source: Launchboard Pipeline (version available on 5/29/18)*

# Skills, Certificates and Education

**Table 9. Top Skills for Environmental Landscaping Occupations in Bay Region (May 2017 - Apr 2018)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Skill** | **Postings** | **Skill** | **Postings** | **Skill** | **Postings** |
| Repair | 341 | Teamwork/Collaboration | 58 | Plumbing | 29 |
| Irrigation Systems | 140 | Lifting Ability | 50 | Predictive/Preventative Maintenance | 29 |
| Hand Tools | 111 | Customer Service | 45 | Occupational Health and Safety | 28 |
| Power Tools | 111 | Painting | 37 | Backhoes | 27 |
| Debris and Litter Control | 98 | Budgeting | 34 | Property Management | 26 |
| Cleaning | 97 | Customer Contact | 32 | Riding Mowers | 26 |
| Fertilizers | 86 | Landscaping | 32 | Staff Management | 26 |
| Herbicides | 79 | Record Keeping | 32 | Carpentry | 25 |
| Machinery | 78 | Rototillers | 32 | Supervisory Skills | 25 |
| Scheduling | 77 | Equipment Operation | 31 | Plant Identification | 23 |
| Oral Irrigation | 66 | Laundry | 29 | Snow Removal | 23 |

*Source: Burning Glass*

**Table 10. Certifications for Environmental Landscaping Occupations in the Bay Region (May 2017 - Apr 2018)**

Note: 59% 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** |
| Driver's License | 284 | First Aid CPR AED | 11 |
| CDL Class C | 15 | Pest Control Applicator | 8 |

*Source: Burning Glass*

**Table 11. Education Requirements for Environmental Landscaping Occupations in Bay Region**

Note: 65% 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 | 254 (96%) |
| Associate Degree | 6 (2%) |
| Bachelor’s Degree or Higher | 5 (2%) |

*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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