Labor Market Forecasts San Mateo County Community College District

Voorhees Group LLC October 2014

Overview

The current status of labor markets in the Mid Peninsula region is highlighted by this report. San Mateo County lies directly between and is a part of two dynamic employment centers, San Francisco to the north and Silicon Valley to the south. Employment in this region grew even during the recent Recession. Included is an overview of the largest and fastest growing job openings in this area with an emphasis on those that require postsecondary training that can be provided by community colleges for job entry.

SMCCCD Labor Market Research

During the past year, the San Mateo County Community College District formed workgroups to examine employment trends and projections data for priority employment areas in the District. These areas include: (1) accounting, (2) biotechnology, (3) digital arts, graphics and media, and (4) health care. Examination of the computer information systems field (a fifth area of focus) is now underway. These studies use employment projections as a beginning for an in-depth look at employer demand throughout the District. Drawing from the expertise of subject area faculty from the three colleges as well as industry representatives, each workgroup sought to explore the connections between the District's array of programs and the local labor market. Surveys, discussions, and interviews with human resource personnel, hiring managers and other professionals from those industries also were conducted to better understand specific employer needs.

The result allows the District to assess how its current program offerings in these five areas match the needs of employers for skilled employees. Suggestions for curriculum change in existing programs and the creation new program offerings are ongoing at the three colleges. Reports from each workgroup are available on the District's strategic planning webpage: http://smccd.edu/strategicplanning/data.php

Voorhees Group Labor Market Research

The Voorhees Group's labor market analysis below offers a starting point similar to the earlier work performed by the District. The occupational trend and forecast data highlighted below provide a somewhat wider picture of the Mid Peninsula's economy.

The most current employment projection data from the State of California Employment Development Department (EDD) are used to paint this picture for the District. We first look at the recent employment trends in San Mateo County, and then at the drivers of those trends. We then focus on labor market projections in the Mid Peninsula through 2020 for the entire labor force. Finally, we converge specifically on the portion of the labor force that require education or training provided by two-year colleges.

Recent Employment Trends

Employment growth in San Mateo County has been robust throughout the past several years. Unemployment has come down steadily since early 2010 in San Mateo County. The August 2014 the unemployment rate was 4.3% (Figure 1), below the national average of 6.1%² and significantly better than the California county average. Between August 2013 and August 2014, the total number of people employed in San Mateo Country grew by an average 1,025 each month to 395,900 by August 2014.



Figure 1 - San Mateo County Civilian Unemployment Rate, 2007-2014

Source: State of California Employment Development Department (2014). Industry Employment Data. Data retrieved from http://www.calmis.ca.gov/file/indhist/sanmahws.xls.

Month-to-month employment growth in San Mateo County, while still quite rapid, cooled in 2013 compared to the previous two years; employment grew by an

¹EDD calculates these projections every two years. The most recently available data for projections were compiled in

October of 2012. ² United States Department of Commerce, Bureau of Labor Statistics. July 2014 Employment Situation News Release. http://www.bls.gov/news.release/empsit.htm

average of 1,300 positions filled each month in 2011 and 2012. To better capture fluctuations in the labor market, we consider trends in employment growth over the past three years. The largest contributors (and their relative contribution) to the 4.2 % average annual increase in employment in San Mateo County over the past several years were:³

- Professional/business services (29%)
 - o Professional, Scientific & Technical Services (20%)
 - Administrative, Support and Waste Services contributed (10%)
- Communication, Information and content producing industries (17%)
- Accommodation and Food Services (16%)
- Trade, transportation and utilities (13%)
 - Retail trade (4%)
 - Transportation, Warehousing and Utilities (8%)
- Educational Care, Health Care and Social Assistance (11%)

The growth seen in these sectors is consistent with occupational projections shown below. The Healthcare and Communications sectors are also priority sectors for workforce development identified by the California Community College Chancellor's Office.⁴

Job Creation in the Mid Peninsula

Much attention has been given to the growth of the high-tech employment sector in the Bay area; it a strong driver of employment both in high-tech but also drives growth in other sectors. In bringing good jobs with higher salaries to the tech sector, it also encourages job growth in other sectors.

This measure is called a *job multiplier*. It indicates how many additional jobs an industry creates in the local economy surrounding it. In Detroit, for example, the auto industry is said to have a job multiplier of 5.4; for every auto industry job, 4.4 additional jobs in everything from transportation to food service support that industry. These jobs can be directly related to business operations/part of the supply chain, such as transporting auto parts to the plants, or not, such as in operating a restaurant next door to a plant.

For the tech industry nationally, this job multiplier has been estimated at six (6); for every tech job, five (5) additional are required to support it. Of these five additional

³ State of California Employment Development Department (2014). Industry Employment Data. Data retrieved from http://www.calmis.ca.gov/file/indhist/sanmahws.xls. Some occupational parent categories contain occupation groups whose contribution to employment growth in San Mateo County was low or negative.

⁴ For 2013-2014, the California Community College Chancellor identifies Energy (Efficiency) and Utilities, Health, and Information and Communications Technology as the three priority sectors for workforce training and development. Retrieved from: http://doingwhatmatters.ccco.edu/ResourceMap/MidPeninsula.aspx.

⁵ Sentz, F. (2012). *Job Multipliers: Silicon Valley vs. The Motor City.* EMSI [Blog post]. Retrieved from: http://www.economicmodeling.com/2012/08/31/job-multipliers-silicon-valley-vs-the-motor-city/#DataAnalysis.

jobs, two are high skilled professions such as medical doctors or lawyers, and three are in additional services. According to a recent study by the Bay Area Council Economic Institute, technology jobs have a multiplier of 4.3, or create 3.3 jobs for every tech job. For example, Apple employs 12,000 workers in Cupertino; however, in support services and other related industries, the company creates an additional 24,000 skilled and 36,000 unskilled jobs in the local economy, indicating that Apple's greatest job influence lies in sectors outside technology. 8

Demand is expected to be high for high-tech occupations in the Mid Peninsula through 2020. At the same time, a continued opportunity exists for SMCCCD to continue to support certificate and degree programs that lead to jobs not only in technology and related services but also in jobs in support fields. ⁹

Looking Forward: Occupations with the Largest Number of Job Openings

Table 1 displays the twenty job openings forecast to *grow the most* between 2010 and 2020 in the San Mateo, San Francisco and Redwood City metropolitan area. This table includes median hourly and annual wages as well as education and on the job training required for these jobs. ¹⁰ The first four are high turnover occupations with relatively low wages that require only short-term on-the-job training. The District's colleges can and should do little to train individuals for these positions. The same is for the next jobs on the list, janitorial occupations and other food service jobs although each of these jobs requires a level of supervision for which colleges can prepare managers. The next cluster of occupations requires postsecondary education and sometimes requires longer-term or intensive on-the-job training is the area that effort should be focused.

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⁶ Moretti, E. (2012). *The New Geography of Jobs*. New York: Houghton Mifflin/Mariner Books.

⁷ Bay Area Council Economic Institute. (2012). Technology Works: High-Tech Employment and Wages in the United States. San Francisco: Bay Area Council Economic Institute. Retrieved from http://documents.bayareacouncil.org/TechReport.pdf.

⁹ See both State of California Employment Development Department's employment projections and the Bay Area Council Economic Institute estimates

¹⁰ State of California Employment Development Department. (2012). Projections of Employment by Industry and Occupation. Data retrieved from: http://www.labormarketinfo.edd.ca.gov/LMID/Projections_of_Employment_by_Industry_and_Occupation.html

	Table 1								
	Top Twenty Occupations ¹¹ with the Largest Number of Openings, San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020								
	Occupational Title	Average Annual Job Openings, 2010- 2020 ¹²	Median Hourly Wage	Median Annual Wage	Entry Level Education	On-the-Job Training			
	Occupational fitte	2020	wage	vvage	Less than high	Halling			
1.	Waiters and Waitresses	1,484	\$10.58	\$22,007	•	Short-term OJT			
2.	Cashiers	1,347	\$11.87	\$24,692	Less than high school	Short-term OJT			
3.	Retail Salespersons	1,312	\$11.58	\$24,089		Short-term OJT			
4.	Personal Care Aides	817	\$12.11	\$25,178	Less than high school	Short-term OJT			
5.	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	709	\$12.64	\$26,287	Less than high school	Short-term OJT			
6.	Combined Food Preparation and Serving Workers, Including Fast Food	686	\$10.83	\$22,522	Less than high school	Short-term OJT			
7.	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	634	\$10.42	\$21,660	Less than high school	Short-term OJT			
8.	Market Research Analysts and Marketing Specialists	624	\$39.36	\$81,880	Bachelor's degree	None			
9.	Software Developers, Applications	614	\$52.64	\$109,488	Bachelor's degree	None			
10.	Accountants and Auditors	607	\$37.67	\$78,362	Bachelor's degree	None			
11.	Registered Nurses	599	\$54.23	\$112,801	Associate's degree	None			
12.	Customer Service Representatives	551	\$20.15	\$41,905	High school diploma or equivalent	Short-term OJT			
13.	Office Clerks, General	547	\$17.67	\$36,751	High school diploma or equivalent	Short-term OJT			
	Software Developers, Systems Software	513		\$117,069	Bachelor's	None			
15.	General and Operations Managers	498	_	\$135,193	Associate's	None			
16.	Food Preparation Workers	495	\$10.64	\$22,136	Less than high	Short-term OJT			

Occupations with 2020 employment greater than 400.
 Includes new positions and openings for replacement positions.

	Table 1 Top Twenty Occupations ¹¹ with the Largest Number of Openings, San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020									
	Occupational Title	Average Annual Job Openings, 2010- 2020 ¹²	Median Hourly Wage	Median Annual Wage	Entry Level Education	On-the-Job Training				
	•				school					
17.	Management Analysts	441	\$46.24	\$96,170	Bachelor's degree	None				
18.	Dishwashers	439	\$10.44	\$21,720	Less than high school	Short-term OJT				
19.	First-Line Supervisors of Office and Administrative Support Workers	437	\$30.01	\$62,422	High school diploma or equivalent	None				
	Cooks, Restaurant	423		\$28,439	Less than high school	Medium-term OJT				

Source: California Economic Development Department. Labor Market Information. Retrieved September 14, 2014 at http://www.labormarketinfo.edd.ca.gov/county/smateo.html

Occupations with Fast Growth

The fastest growing occupations for this same timeframe are skilled occupations, and are to a large degree concentrated in the computer and technology sectors. These jobs are predicted to have the largest percent increase between 2010 and 2020. Table 2 shows the twenty fastest growing occupations in the San Mateo, San Francisco and Redwood City metropolitan areas by average annual employment, median annual wages, and entry-level education required.

The computer and technology sectors including software application developers and systems software developers will see an annual employment increases between 48 and 57 percent; information security analysts, web developers and computer network architects will grow by 37 percent; computer and information systems managers is estimated to grow by 30 percent; network and computer systems administrators are predicted to grow by 40 percent; and multimedia artist and animators growing by 38 percent.

Computer and information research scientists, database administrators, and computer hardware engineers also appear on fastest growing list, although their total demand is more modest (Table 2).

Table 2
Top Twenty Fastest Growing Occupations¹³,
San Mateo, San Francisco and the Redwood City metropolitan area, 2010-2020

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	Occupational Title	Annual Average Employment, 2010	Annual Average Employment, 2020	% Increase	Median Annual Wages, 2012	Entry Level Education	On-the- Job Training
1.	Biomedical Engineers	590	1,320	123.7	\$106,371	Bachelor's degree	None
2.	Microbiologists	970	1,710	76.3	\$96,580	Bachelor's degree	None
3.	Computer and Information Research Scientists	850	1,340	57.6	\$119,719	Doctoral or Professional degree	None
4.	Software Developers, Systems Software	7,580	11,920	57.3	\$117,069	Bachelor's degree	None
5.	Market Research Analysts and Marketing Specialists	7,640	11,850	55.1	\$81,880	Bachelor's degree	None
6.	Biochemists and Biophysicists	980	1,510	54.1	\$94,521	Doctoral or Professional degree	None
7.	Medical Scientists, Except Epidemiologists	4,090	6,240	52.6	\$86,685	Doctoral or Professional degree	None
8.	Home Health Aides	4,310	6,560	52.2	\$24,164	Less than high school	Short- term OTJ
9.	Biological Technicians	1,270	1,910	50.4	\$69,919	Bachelor's degree	None
10.	Meeting, Convention, and Event Planners	1,180	1,770	50.0	\$56,586	Bachelor's degree	None
11.	Advertising Sales Agents	1,870	2,800	49.7	\$62,520	High school diploma or equivalent	Medium- term OJT
12.	Software Developers, Applications	10,510	15,570	48.1	\$109,488	Bachelor's degree	None
13.	Logisticians	940	1,390	47.9	\$77,544	Bachelor's degree	None
14.	Natural Sciences Managers	1,490	2,200	47.7	\$168,351	Bachelor's degree	None
15.	Computer Hardware	960	1,410	46.9	\$120,589	Bachelor's degree	None

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 $^{^{\}rm 13}$ Occupations with 2020 employment greater than 400.

Table 2
Top Twenty Fastest Growing Occupations ¹³ ,
San Mateo, San Francisco and the Redwood City metropolitan area, 2010-2020

Occupational Title	Annual Average Employment, 2010	Annual Average Employment, 2020	% Increase	Median Annual Wages, 2012	Entry Level Education	On-the- Job Training
Engineers						
16. Chemists	1,230	1,800	46.3	\$98,167	Bachelor's degree	None
17. Database Administrators	1,120	1,610	43.8	\$96,688	Bachelor's degree	None
18. Pharmacy Aides	610	870	42.6	\$24,263	High school diploma or equivalent	Short- term OTJ
19. Technical Writers	740	1,040	40.5	\$82,010	Bachelor's degree	Short- term OTJ
20. Network and Computer Systems Administrators	4,120	5,780	40.3	\$96,316	Bachelor's degree	None

Source: California Economic Development Department. Labor Market Information. Retrieved September 14, 2014 at http://www.labormarketinfo.edd.ca.gov/county/smateo.html

Declining Occupations

Table 3 depicts twenty occupations that will *decline* in number through 2020. Not surprisingly, in the age of email, large reductions are forecast for the postal service. Many of these declining occupations will continue to be impacted by developments in technology as well as a general shift away from manual and clerical labor. It is not generally advisable for the District to develop new programs in these areas.

	Table 3 Top Twenty Declining Occupations San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020										
Annual Average Annual Average # Occupational Title Employment 2010 Employment 2020 Change											
1.	Postal Service Mail Sorters, Processors, and Processing	1.670	760	010	54.5						
2.	Machine Operators Postal Service Mail Carriers	1,670 2,380	760 1,840	-910 -540	-54.5 -22.7						
3.	Farmers, Ranchers, and Other Agricultural Managers	2,580	2,200	-380	-14.7						
4.	Travel Agents	920	630	-290	-31.5						

Table 3

Top Twenty Declining Occupations

San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020

O	Annual Average	Annual Average	#	%
Occupational Title	Employment 2010	Employment 2020	Change	Change
5. Switchboard Operators,	1 200	970	-290	-23.0
Including Answering Service	1,260			
6. Postal Service Clerks	500	230	-270	-54.0
7. Claims Adjusters, Examiners,				
and Investigators	1,970	1,720	-250	-12.7
8. Prepress Technicians and				
Workers	600	390	-210	-35.0
9. File Clerks	1,450	1,250	-200	-13.8
10. Insurance Claims and Policy				
Processing Clerks	1,790	1,590	-200	-11.2
11. Word Processors and Typists	1,500	1,320	-180	-12.0
12. Brokerage Clerks	910	790	-120	-13.2
13. Insurance Underwriters	950	830	-120	-12.6
14. Office Machine Operators,				
Except Computer	1,240	1,140	-100	-8.1
15. Farmworkers and Laborers,				
Crop, Nursery, and				
Greenhouse	1,080	1,010	-70	-6.5
16. Title Examiners, Abstractors,				
and Searchers	310	250	-60	-19.4
17. Print Binding and Finishing				
Workers	290	240	-50	-17.2
18. Computer Operators	550	510	-40	-7.3
19. Architectural and Civil Drafters	1,200	1,170	-30	-2.5
20. Printing Press Operators	1,220	1,190	-30	-2.5

Source: California Economic Development Department. Labor Market Information. Retrieved September 14, 2014 at http://www.labormarketinfo.edd.ca.gov/county/smateo.html

Note: Occupations whose positions require training at a two-year institution are those that require a post secondary non-degree award, associates degree, medium-term on-the-job training or long-term on-the-job training.

Occupations Requiring Postsecondary Education

Occupations that require a post-secondary (non-degree) award or an associate's degree are most pertinent to the SMCCCD's workforce training planning. This section presents the employment projections specifically for these occupations through 2020.

Healthcare-related fields dominate the occupations in which a postsecondary award or associate degree is required (Table 4). Occupations requiring management skills as well as knowledge of engineering and information technology systems will also see a high number of job openings between now and 2020. These occupations align

closely with the California Community College Chancellor's office list of priority workforce training needs.

			Table 4								
T	Top Twenty Occupations 14 with the Largest Number of Openings Requiring Certification or a										
	Diploma from a 2-year Institution,										
	San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020										
		Average									
		Annual Job									
		Openings,	Median	Median							
		2010-	Hourly	Annual	Entry Level	On-the-Job					
	Occupational Title	2020 ¹⁵	Wage	Wage	Education	Training					
					Associates						
1.	Registered Nurses	599	\$54.23	\$112,801	Degree	None					
2.	General and Operations				Associates						
	Managers	498	\$65.00	\$135,193	Degree	None					
					Postsecondary						
3.	Nursing Aides, Orderlies, and Attendants	160	\$17.48	¢26.261	non-degree	None					
	Attendants	160	\$17.48	\$36,361	award	none					
					Postsecondary non-degree						
4.	Massage Therapists	131	\$14.10	\$29,314	award	None					
	······································		7-11-5	7 = 0 / 0 = 1	Postsecondary						
5.	Licensed Practical and Licensed				non-degree						
	Vocational Nurses	116	\$30.06	\$62,507	award	None					
6.	Preschool Teachers, Except				Associates						
	Special Education	113	\$17.83	\$37,091	Degree	None					
					Postsecondary						
7.	Hairdressers, Hairstylists, and	100	647.50	dac 427	non-degree '						
	Cosmetologists	106	\$17.52	\$36,437	award	None					
0	Paralegals and Legal Assistants	106	\$33.60	\$69,887	Associates	None					
8.	raialegais and Legal Assistants	100	\$33.00	\$05,667	Degree Postsecondary	None					
					non-degree						
9.	Manicurists and Pedicurists	105	\$10.59	\$22,024	award	None					
					Postsecondary						
					non-degree						
10.	Firefighters	103	N/A	N/A	award	Long-term OTJ					
					Postsecondary						
11.	Aircraft Mechanics and Service	400	622.25	667.000	non-degree	NI-					
-	Technicians	102	\$32.26	\$67,088	award	None					
12	Construction Managers	86	\$55.75	\$115,950	Associates Degree	None					
12.	Construction Managers	30	۷,,,,,	7113,330	Postsecondary	NONE					
13.	Dental Assistants	85	\$23.13	\$48,102	non-degree	None					
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Occupations with 2020 employment greater than 400.
 Includes new positions and openings for replacement positions.

Table 4

Top Twenty Occupations¹⁴ with the Largest Number of Openings Requiring Certification or a Diploma from a 2-year Institution,

San Mateo, San Francisco and Redwood City metropolitan area, 2010-2020

	,	Average Annual Job Openings,	Median	, . Median	•	
	Occupational Title	2010- 2020 ¹⁵	Hourly Wage	Annual Wage	Entry Level Education	On-the-Job Training
					award	
14.	Telecommunications Equipment Installers and Repairers, Except Line Installers	62	\$31.09	\$64,665	Postsecondary non-degree award	Medium-term OTJ
15.	Audio and Video Equipment Technicians	60	\$23.53	\$48,938	Postsecondary non-degree award	Medium-term OTJ
16.	Skincare Specialists	48	\$14.93	\$31,050	Postsecondary non-degree award	None
17.	Dental Hygienists	39	\$52.56	\$109,317	Associates Degree	None
18.	First-Line Supervisors of Production and Operating Workers	36	\$30.17	\$62,758	Postsecondary non-degree award	None
19.	Radiologic Technologists and Technicians	35	\$40.04	\$83,295	Associates	None
20.	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	34	\$25.45	\$52,947	Postsecondary non-degree award	Long-term OTJ

Source: California Economic Development Department. Labor Market Information. Retrieved September 14, 2014 at http://www.labormarketinfo.edd.ca.gov/county/smateo.html

EDD estimates occupations requiring some level of postsecondary education are strongest in personal, industrial maintenance and healthcare. These will have the fastest growth between 2010 and 2020 (Table 5). Many of the occupations related to industrial maintenance work are in the Health and Information and Communications Technology sector— priority sectors for workforce development as identified by the California Community College Chancellor's Office.

Table 5
Top Twenty Fastest Growing Occupations¹⁶ Requiring Certification or a Diploma from a 2-year Institution,

San Mateo, San Francisco and the Redwood City metropolitan area, 2010-2020

1.	Occupational Title Skincare Specialists	Annual Average Employment, 2010	Annual Average Employment, 2020	% Increase 34.1	Median Annual Wages, 2012 \$31,050	Entry Level Education Postsecondary	On-the- Job Training None
	·					non-degree award	
2.	Manicurists and Pedicurists	2,030	2,720	34.0	\$22,024	Postsecondary non-degree award	None
3.	Hairdressers, Hairstylists, and Cosmetologists	2,070	2,740	32.4	\$36,437	Postsecondary non-degree award	None
4.	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	700	920	31.4	\$52,947	Postsecondary non-degree award	Long- term OTJ
5.	Veterinary Technologists and Technicians	560	730	30.4	\$38,845	Associates Degree	None
6.	Massage Therapists	3,140	3,940	25.5	\$29,314	Postsecondary non-degree award	None
7.	Telecommunications Equipment Installers and Repairers, Except Line Installers	1,500	1,880	25.3	\$64,665	Postsecondary non-degree award	Medium- term OTJ
8.	Audio and Video Equipment Technicians	1,150	1,430	24.3	\$48,938	Postsecondary non-degree award	Medium- term OTJ
9.	Emergency Medical Technicians and Paramedics	590	720	22.0	\$45,495	Postsecondary non-degree award	None
10.	Respiratory Therapists	850	1,030	21.2	\$80,622	Associates Degree	None
11.	Paralegals and Legal Assistants	3,020	3,650	20.9	\$69,887	Associates Degree	None
12.	Sound Engineering Technicians	500	590	18.0	\$46,995	Postsecondary non-degree award	Short- term OTJ
13.	Radiologic	1,060	1,250	17.9	\$83,295	Associates	None

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 $^{^{\}rm 16}$ Occupations with 2020 employment forecasted to be greater than 400.

Table 5
Top Twenty Fastest Growing Occupations¹⁶ Requiring Certification or a Diploma from a 2-year Institution,

San Mateo, San Francisco and the Redwood City metropolitan area, 2010-2020

Occupational Title	Annual Average Employment, 2010	Annual Average Employment, 2020	% Increase	Median Annual Wages, 2012	Entry Level Education	On-the- Job Training
Technologists and Technicians					Degree	
14. Dental Hygienists	1,030	1,210	17.5	\$109,317	Associates Degree	None
15. Construction Managers	4,010	4,610	15.0	\$115,950	Associates Degree	None
16. Registered Nurses	18,190	20,890	14.8	\$112,801	Associates Degree	None
17. Health Technologists and Technicians, All Other	660	750	13.6	\$52,626	Postsecondary non-degree award	Short- term OTJ
18. Broadcast Technicians	440	500	13.6	\$54,231	Associates Degree	Short- term OTJ
19. Nursing Aides, Orderlies, and Attendants	6,150	6,960	13.2	\$36,361	Postsecondary non-degree award	None
20. Life, Physical, and Social Science Technicians, All Other	610	690	13.1	\$39,900	Associates Degree	Medium- term OTJ

Source: California Economic Development Department. Labor Market Information. Retrieved September 14, 2014 at http://www.labormarketinfo.edd.ca.gov/county/smateo.html