Green Jobs
Where are they?

Philip Jordan, BW Research Partnership

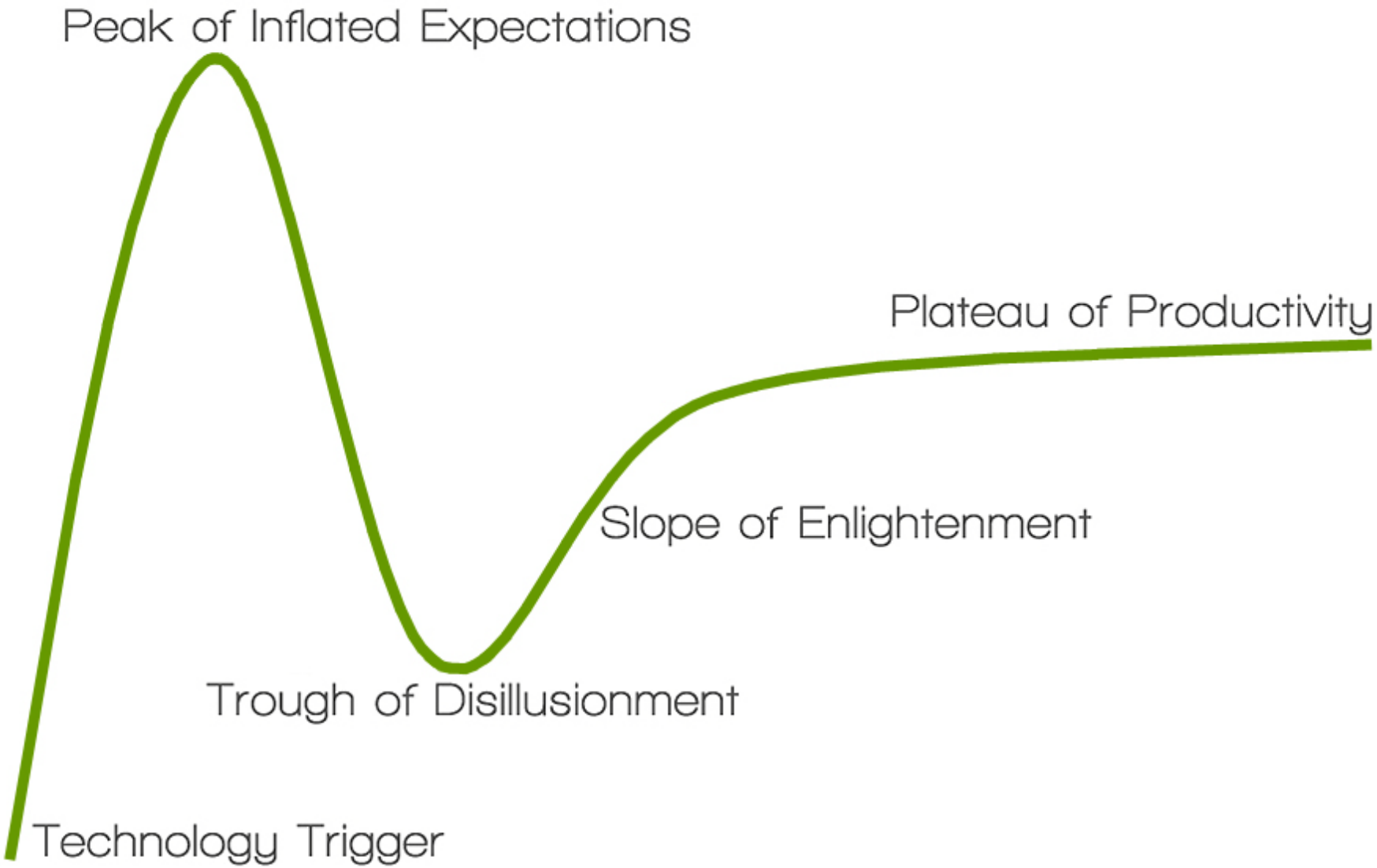
[bw] RESEARCH PARTNERSHIP

GREEN LMI

Don't believe the

hype?

Gartner Hype Cycle



1

An Overview of Studies:

Massachusetts Clean Energy Study

Methodology

Comprehensive Database Development

Analysis of BLS Clean Energy Categories

Survey of Known Employers

Random Sampling

- 31,000+ phone calls
- 1,401 total survey completions
- Margin of Error = +/-2.5% at 95% confidence

Highlighted Findings

6.7%

Job growth

Massachusetts Clean Energy Industry
experienced from July 2010 to July 2011

Compared to <1% Overall in MA

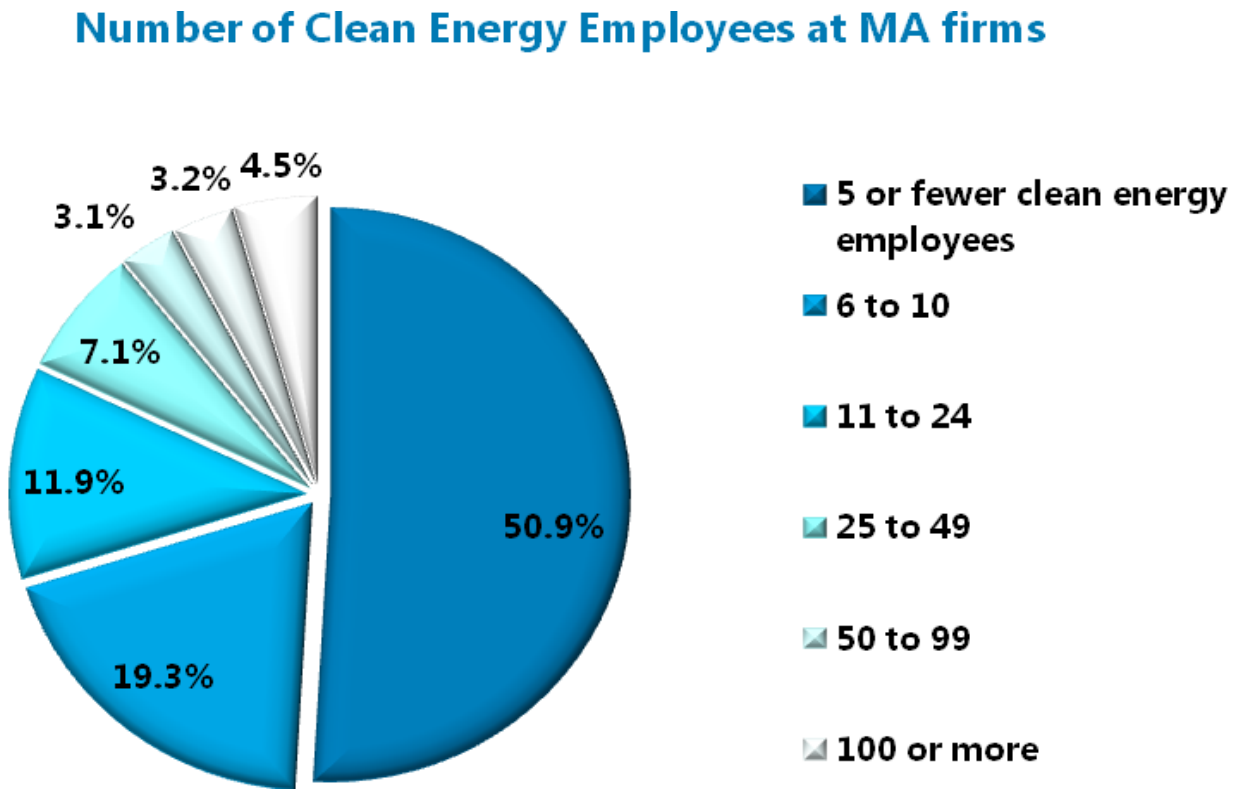
15.2%

Projected growth in 2011-2012

Compared to <2% Projected Overall in MA

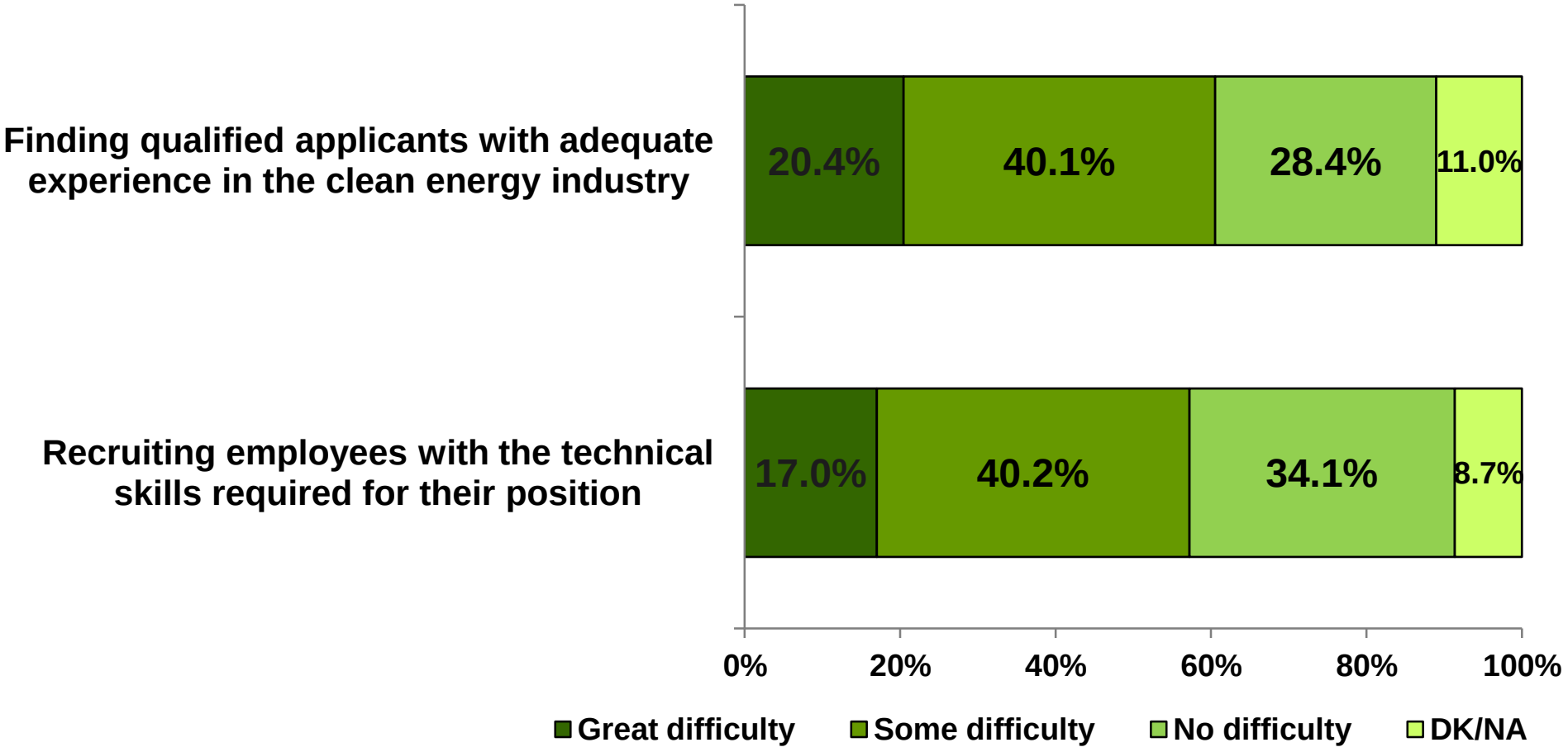
Firms by Employment Size

Small businesses are critical to the sector



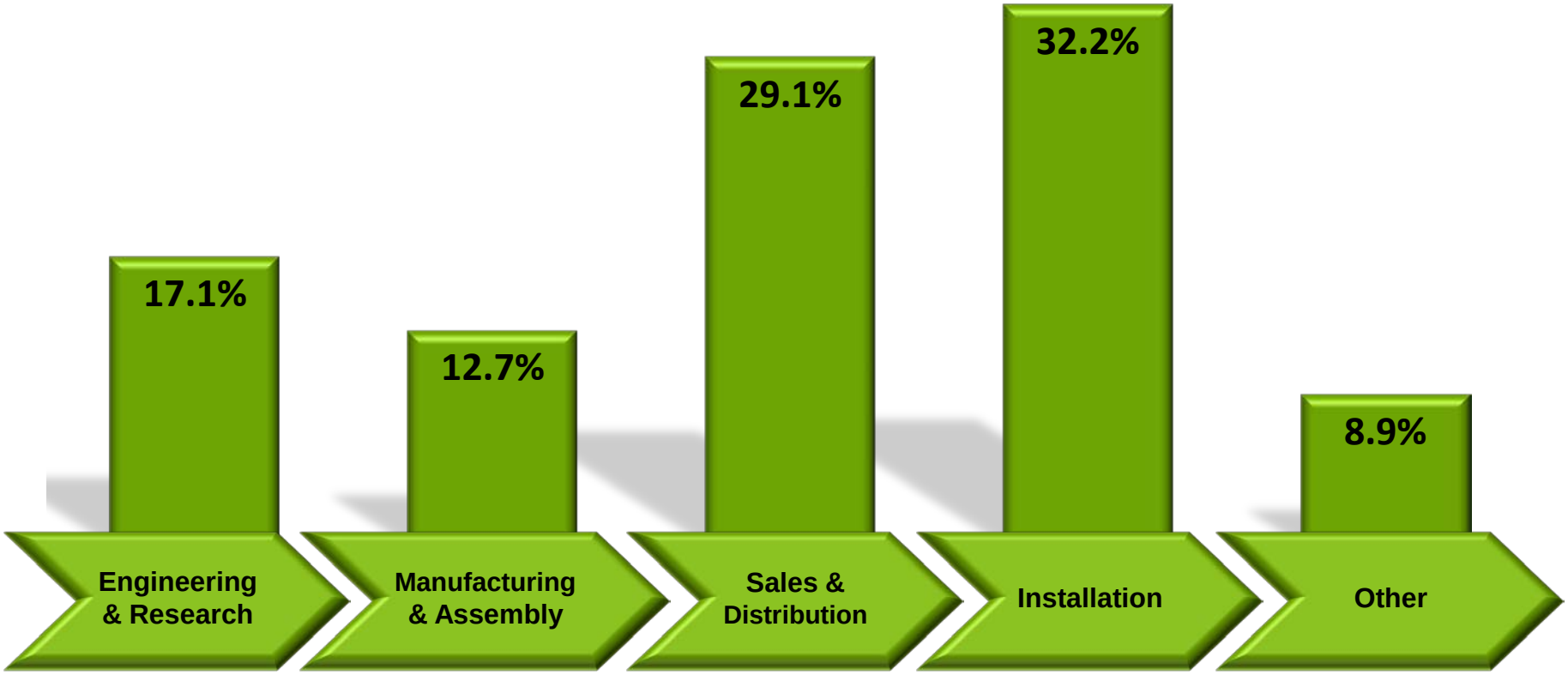
Talent is Critical

Employers compete for the highest level of talent; with each other and with other locations



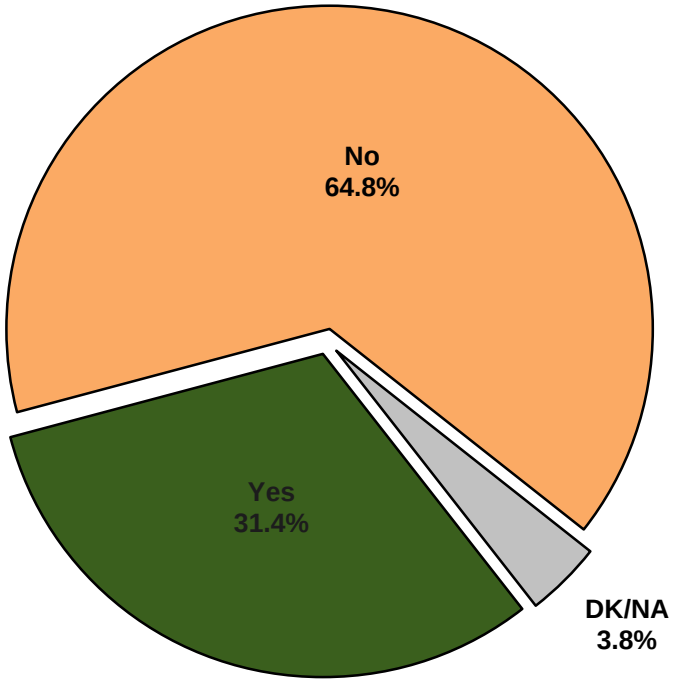
The Value Chain

Massachusetts shows strength across the entire value chain of activities

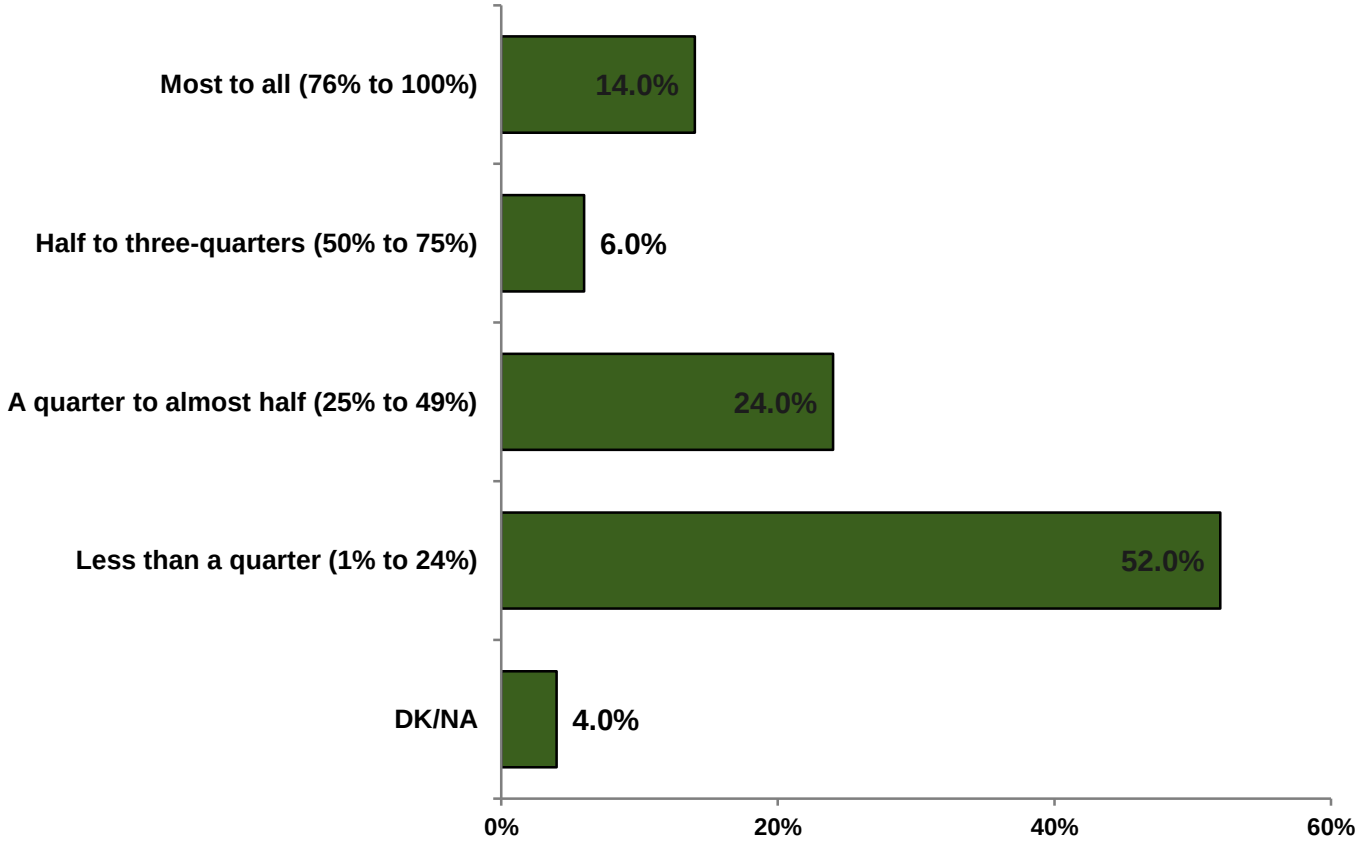


2 San Diego Green Construction Report

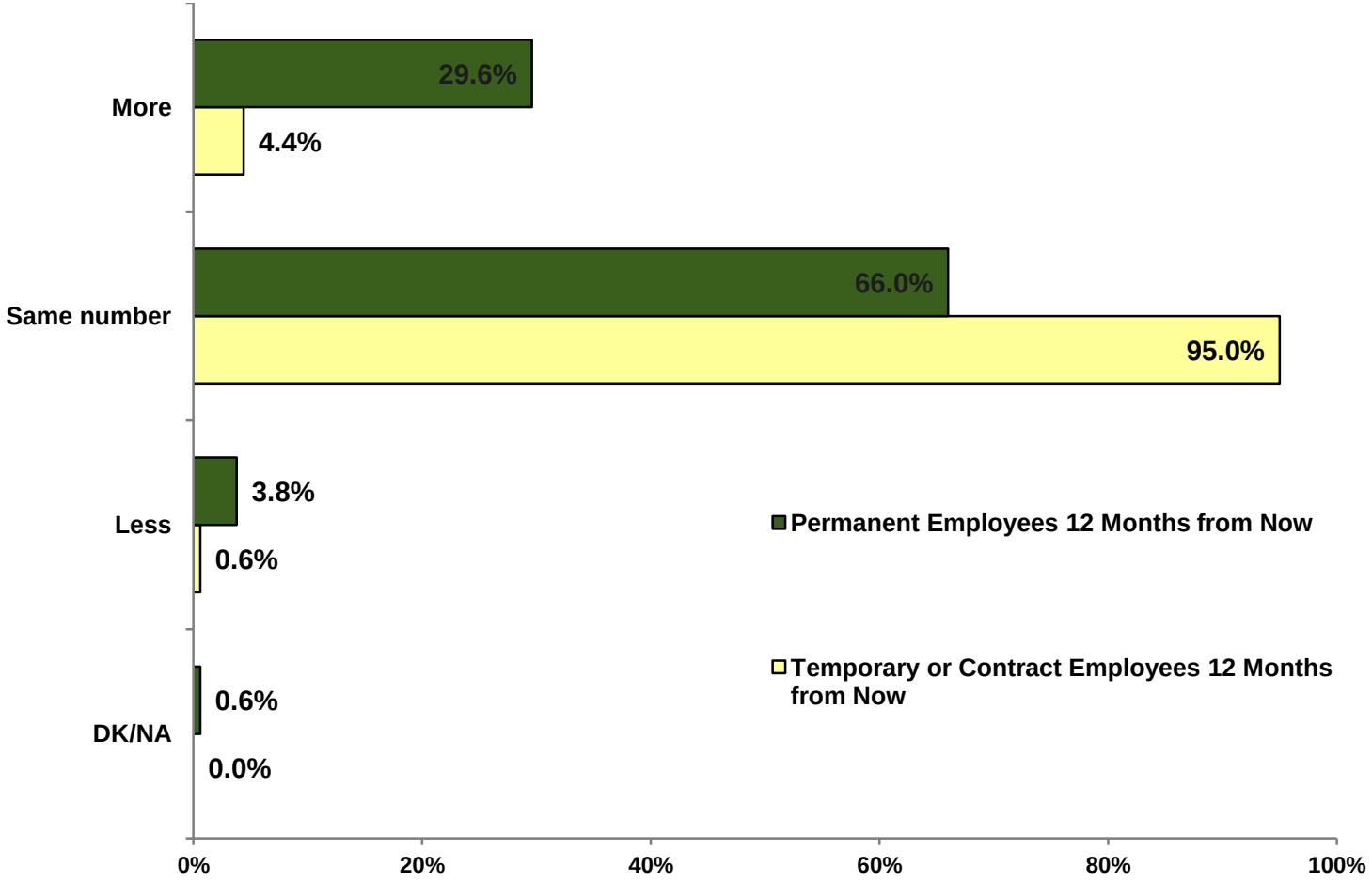
Firms in Green Construction



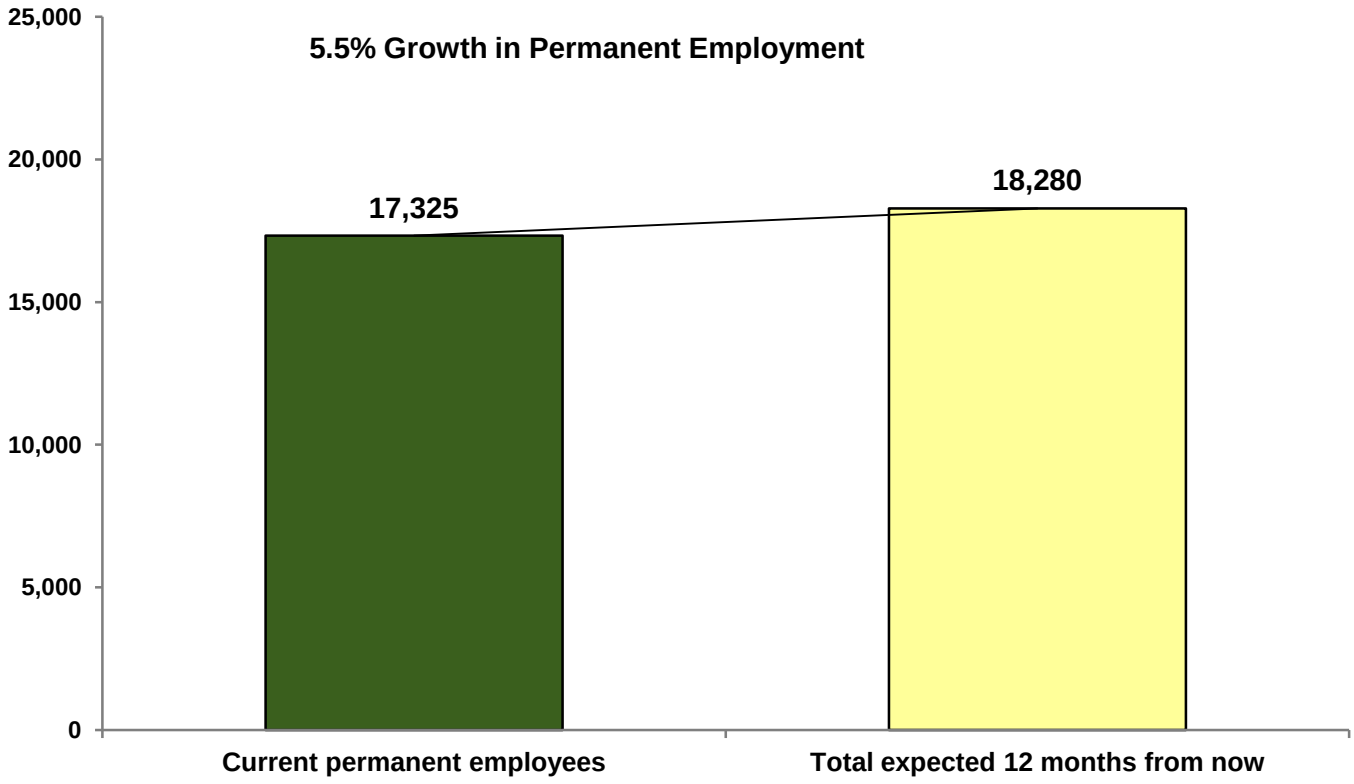
Green Firm Revenue



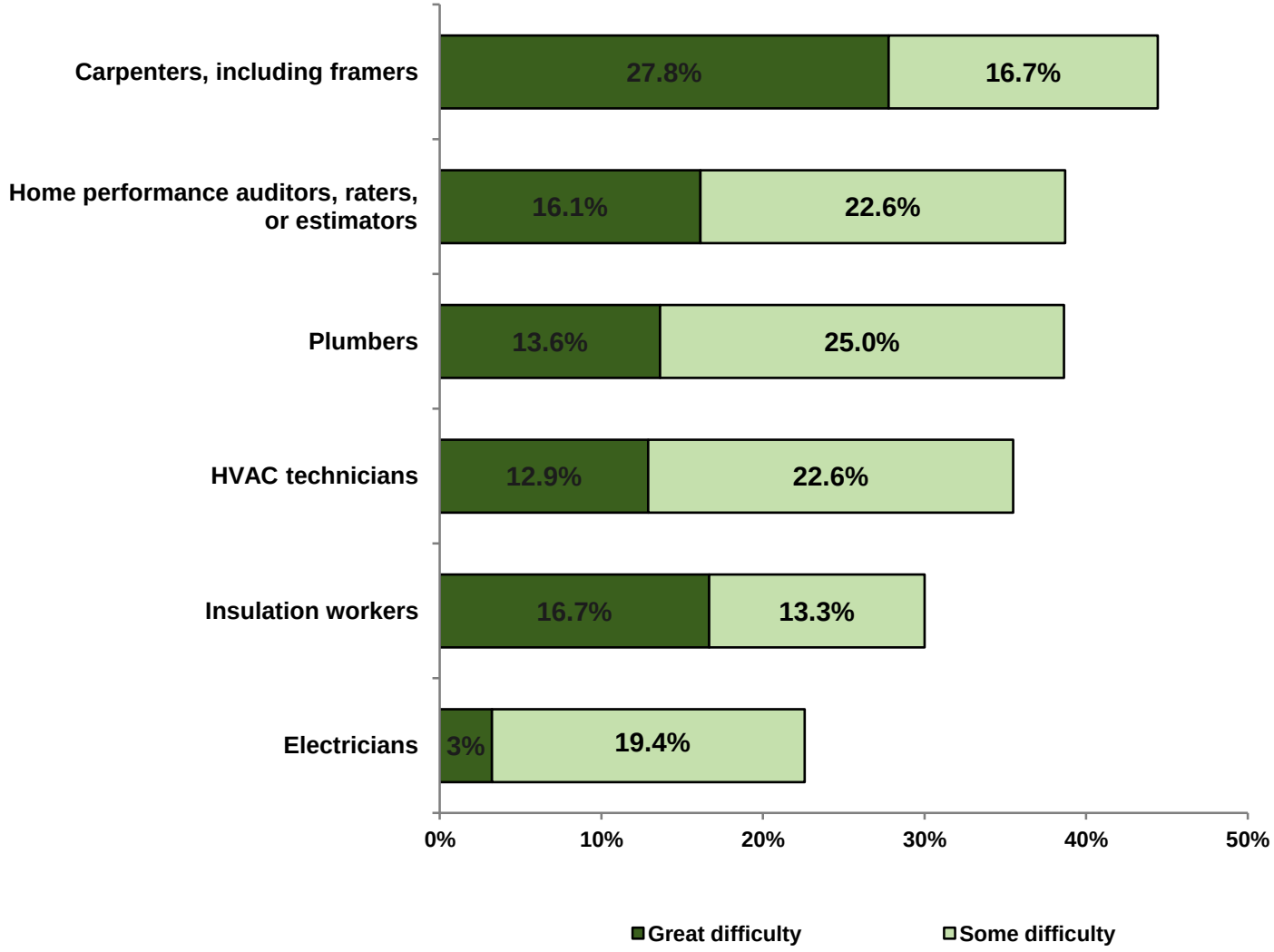
12 Month Hiring Expectations



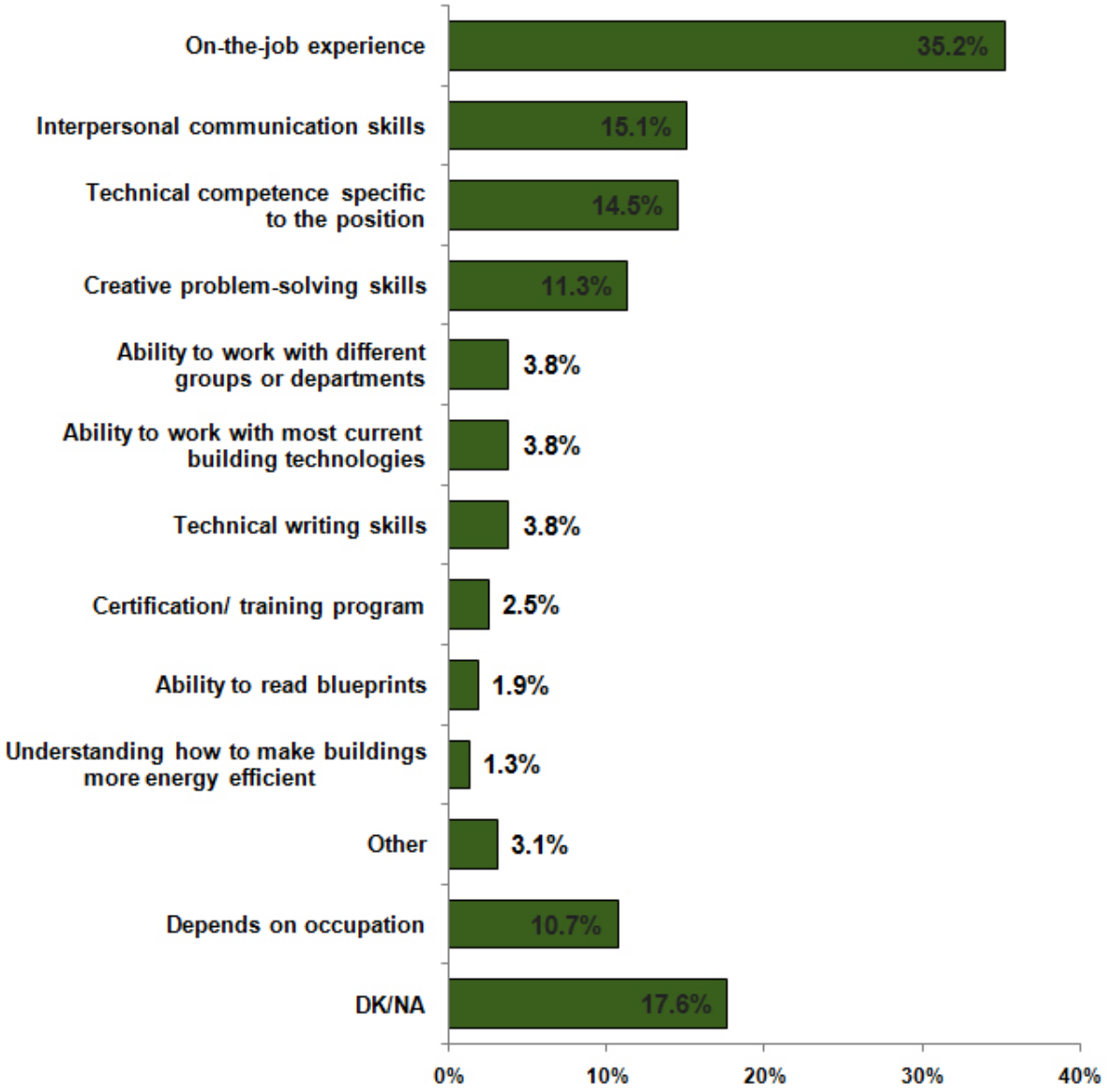
Employment Growth



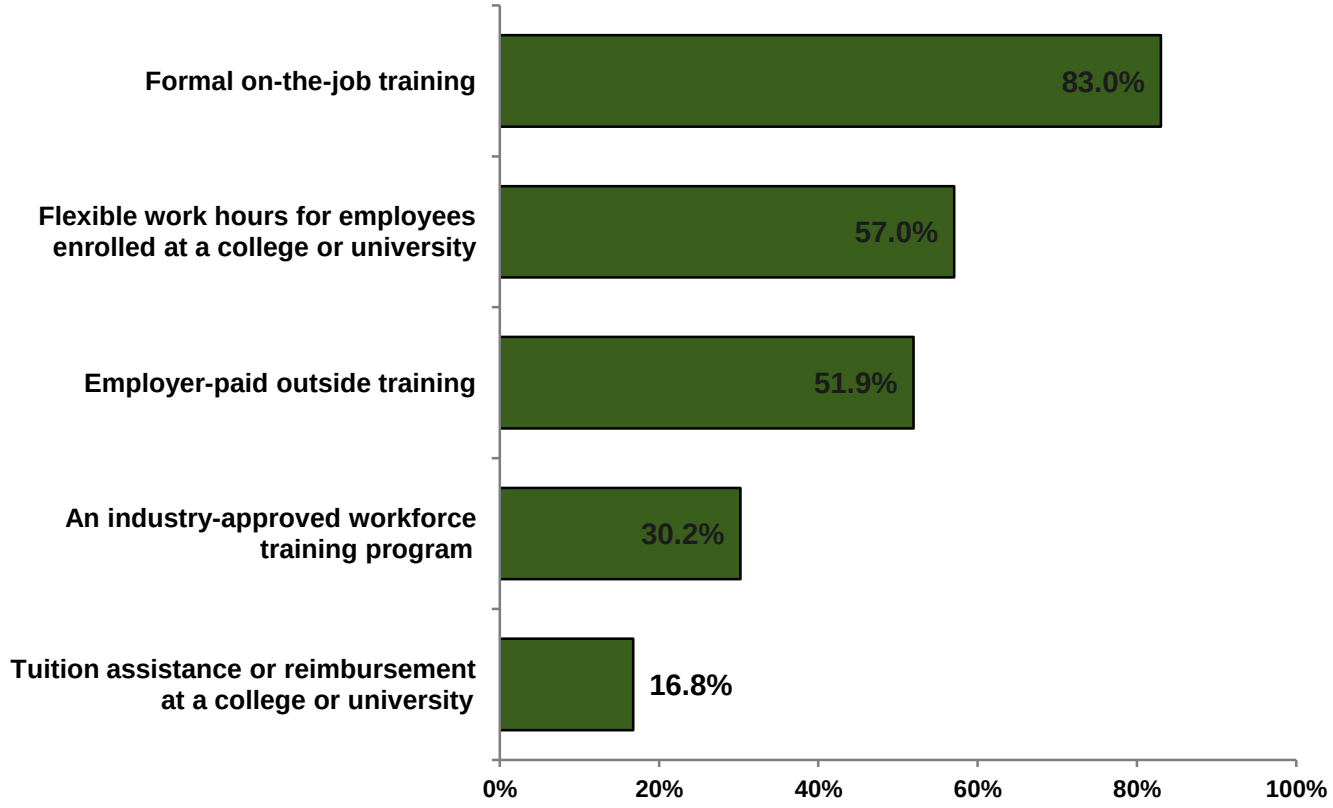
Occupations



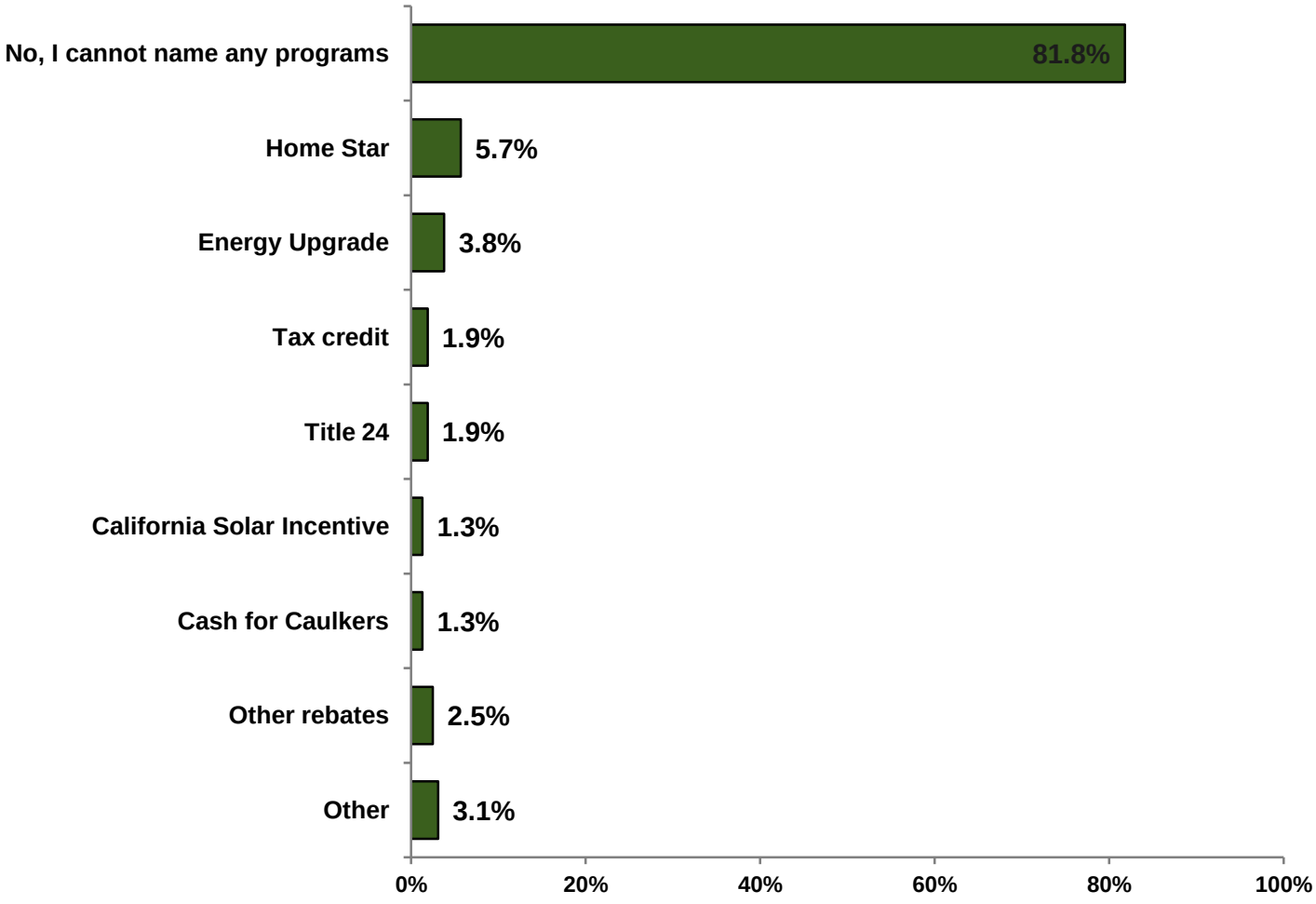
Skill Preferences



Training Preferences

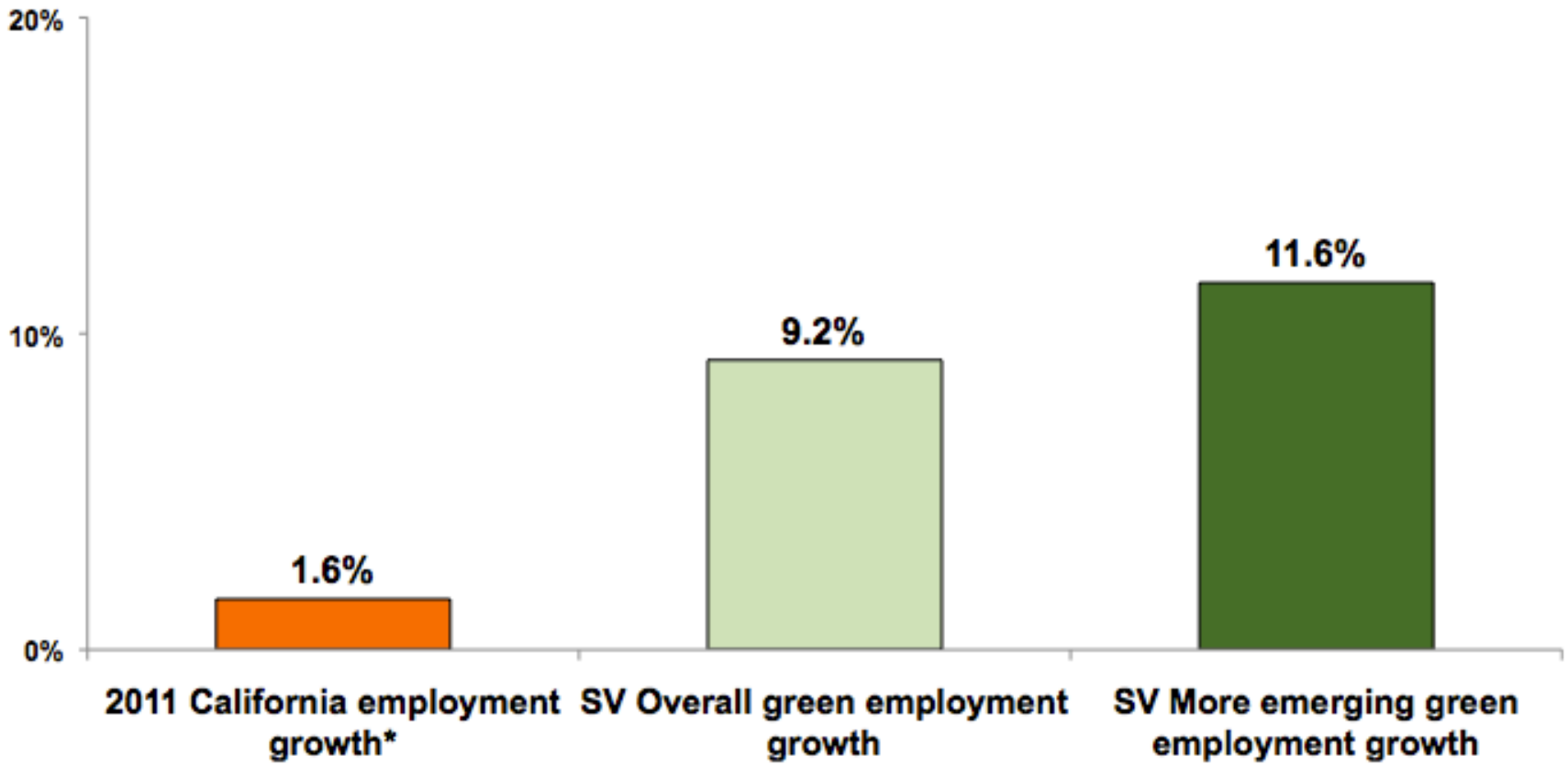


Green Program Knowledge – Uh oh…



3 Silicon Valley Emerging Green (w2f)

Growth Expectations for Green Employers



*Laying the Groundwork for California's Economic Recovery. UCLA Anderson Forecast. Jerry Nickelsburg. 2010

Occupational Profile for Emerging Green Industries

	Avg. Wage per hour (CA)	California Workforce	Silicon Valley Workforce	Emerging Green Industries Workforce
Tier 1 Occupations	$ 43.84	22.4%	34.0%	60.9%
Tier 2 Occupations	$ 20.53	58.6%	50.0%	38.7%
Tier 3 Occupations	$ 11.99	19.0%	16.0%	0.4%

Tier 1 Occupations = Manager, Professional & Science

Tier 2 Occupations = Sales, Administrative & Production

Tier 3 Occupations = Food service, personal care & cleaning positions

Conclusions

Conclusion I

Strong Growth

Recent studies show strong growth, with over half of employers expecting to increase staffing levels.

Opportunity & Challenge

SV's emerging green occupational profile is:

- 61% high wage/ high skill occupations
- 38% middle wage/ middle skill occupations
- virtually no low skill/ low wage occupations

What does this mean for the nation and innovative vs. traditional industries??

Change is Constant

More than 3/5 of employers expect at least some change in the composition of their workforce.

1/5 expects substantial change.

But there is little difficulty finding qualified workers...

Recommendations

Continuing Feedback from Employers

Develop better relationships with employers.

Identify and examine metrics and indicators that inform the continued assessment of the clean energy industries.

Recommendation II

Experience is Key for Job-seekers

Develop new training models that provide opportunities for industry experience and greater understanding of operations in key segments.

Recommendation III

Workforce Needs are diverse, Training Cohorts should be as well

Workforce investment boards and training providers should focus on meeting specific workforce needs by providing more varied and specialized training to smaller cohorts of trainees.

Green Jobs

Where are they?

Thank you very much!

Philip Jordan, BW Research Partnership
(617) 395-8898
pjordan@bwresearch.com
http://bwresearch.com

[bw] RESEARCH PARTNERSHIP

GREEN LMI