



Regional Economic Analysis Profile

San Francisco Bay Area Economic Sub-Market
Lake, Napa, and Sonoma Counties

April 2015



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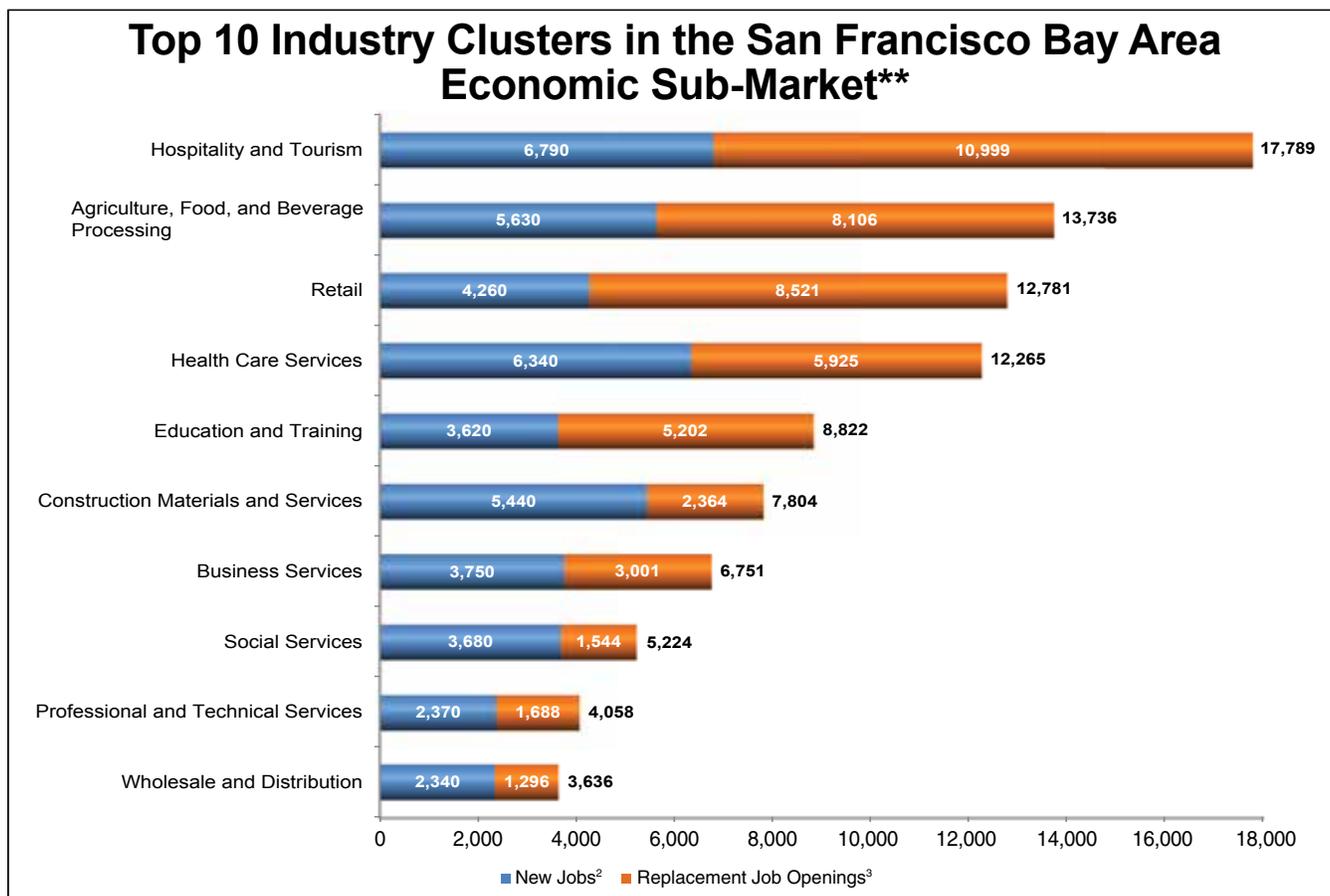
SUMMARY OF THE SAN FRANCISCO BAY AREA ECONOMIC SUB-MARKET INDUSTRY CLUSTERS

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 the 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.



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 San Francisco Bay Area Economic Sub-Market's** top 10 industry clusters followed by a list of the top industries with the highest total projected total job openings in the cluster.

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 was comprised of almost 18,000 workers, or 7.1 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
- Special Food Services
- Drinking Places (Alcoholic Beverages)

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 more than 32,000 people during 2013-2014,* or 12.6 percent of the economic sub-market's workforce. Top industries in this cluster include:

- Beverage Manufacturing
- Support Activities for Crop Production
- Fruit and Tree Nut Farming
- Fruit and Vegetable Preserving and Specialty Food Manufacturing
- Dairy Product Manufacturing

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 24,000 workers, or 9.5 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
- Clothing Stores
- Building Material and Supplies Dealers
- Automobile Dealers

The **Health Care Services** industry cluster includes acute care and outpatient hospitals, nursing homes and rehabilitation centers, adult day care centers, and community service agencies for the elderly. It employed more than 30,000 people in the economic sub-market's during 2013-2014,* accounting for 11.8 percent of the workforce. Industries in this cluster may include both public and private employment. Top industries within this cluster include:

- General Medical and Surgical Hospitals
- Outpatient Care Centers
- Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
- Offices of Physicians
- Offices of Dentists

The **Education and Training** industry cluster is comprised of public and private 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 almost 20,000 people in the economic sub-market, accounting for 7.7 percent of the workforce. Top industries within this cluster include:

- Elementary and Secondary Schools
- Colleges, Universities, and Professional Schools
- Junior Colleges
- Educational Support Services
- Technical and Trade Schools

* 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,* almost 15,000 workers made up the cluster's employment, representing 5.7 percent of the economic sub-market's total workforce. Industries showing the highest projected job openings include:

- Building Equipment Contractors
- Residential Building Construction
- Building Finishing Contractors
- Other Specialty Trade Contractors
- Foundation, Structure, and Building Exterior Contractors

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. During 2013-2014,* the cluster employed more than 12,000 people and accounted for 4.8 percent of the economic sub-market's workforce. Top industries in this cluster include:

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

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 almost 14,000 people and accounted for 5.3 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,* more than 5,000 people were employed in the economic sub-market, or 2.1 percent of the workforce. Top industries within this cluster include:

- Management, Scientific, and Technical Consulting Services
- Architectural, Engineering, and Related Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Other Professional, Scientific, and Technical Services
- Advertising, Public Relations, and Related 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,* almost 6,000 people were employed in the economic sub-market, which accounted for 2.3 percent of the workforce. Industries with the highest number of expected job openings include:

- Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- Lumber and Other Construction Materials Merchant Wholesalers
- Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers
- Commercial and Industrial Machinery and Equipment Rental and Leasing
- Machinery, Equipment, and Supplies 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 San Francisco Bay Area Economic Sub-Market.**

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

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

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

** This Economic Sub-Market includes Lake, Napa, and Sonoma Counties.

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: Hospitality and Tourism Cluster

San Francisco Bay Area Economic Sub-Market
Lake, Napa, and Sonoma Counties

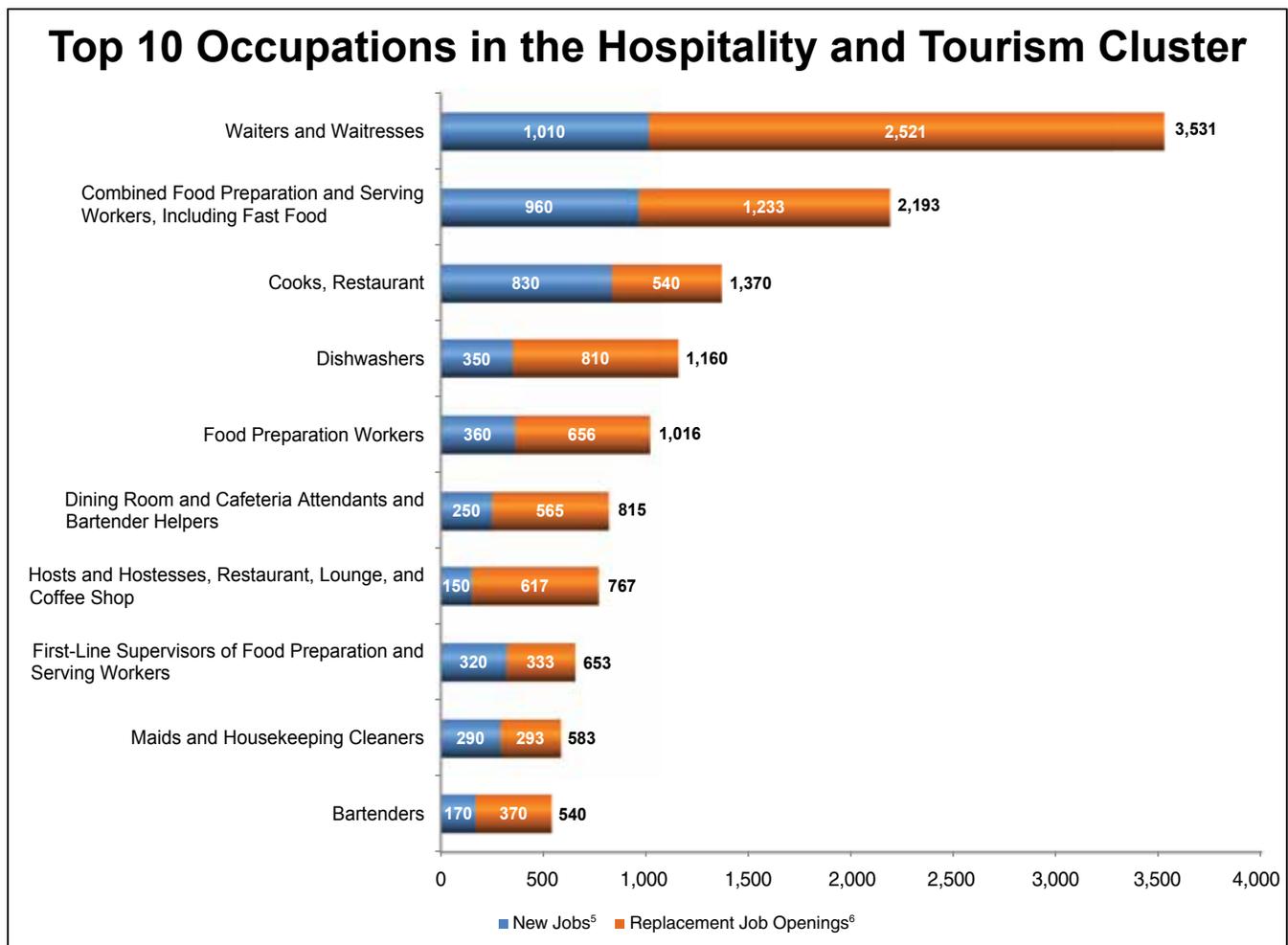
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What is the Hospitality and Tourism Cluster?

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 San Francisco Bay Area Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent almost three-quarters of the 17,789 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, coordination, reading comprehension, social perceptiveness, and speaking.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 Hospitality and Tourism Cluster

The table below further profiles the San Francisco Bay Area 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 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)
Waiters and Waitresses	3,531	\$9.31	\$19,373	Less than high school	284
Combined Food Preparation and Serving Workers, Including Fast Food	2,193	\$9.72	\$20,221	Less than high school	250
Cooks, Restaurant	1,370	\$12.53	\$26,058	Less than high school	250
Dishwashers	1,160	\$9.97	\$20,722	Less than high school	115
Food Preparation Workers	1,016	\$9.67	\$20,112	Less than high school	82
Dining Room and Cafeteria Attendants and Bartender Helpers	815	\$9.40	\$19,562	Less than high school	61
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	767	\$9.46	\$19,687	Less than high school	56
First-Line Supervisors of Food Preparation and Serving Workers	653	\$14.84	\$30,866	High school diploma or equivalent	476
Maids and Housekeeping Cleaners	583	\$11.63	\$24,180	Less than high school	259
Bartenders	540	\$9.82	\$20,425	Less than high school	42

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 March 12, 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 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 San Francisco Bay Area 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	96	\$47.13	\$98,027	96
Coaches and Scouts	74	N/A	\$36,374	88
Meeting, Convention, and Event Planners	61	\$21.88	\$45,505	45
Athletic Trainers	39	N/A	\$44,877	2
Accountants and Auditors	32	\$33.57	\$69,831	328
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Massage Therapists	141	\$17.96	\$37,353	52
Skincare Specialists	13	\$16.75	\$34,831	13
Actors	3	N/A	N/A	11
Manicurists and Pedicurists	2	\$10.93	\$22,743	10
First-Line Supervisors of Production and Operating Workers	1	\$28.80	\$59,915	304
Requires a High School Diploma or Equivalent or Less				
Waiters and Waitresses	3,531	\$9.31	\$19,373	284
Combined Food Preparation and Serving Workers, Including Fast Food	2,193	\$9.72	\$20,221	250
Cooks, Restaurant	1,370	\$12.53	\$26,058	250
Dishwashers	1,160	\$9.97	\$20,722	115
Food Preparation Workers	1,016	\$9.67	\$20,112	82

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 March 12, 2015.

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

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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, critical thinking and speaking are the most commonly shared skills, followed by monitoring, reading comprehension, and social perceptiveness. 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	Negotiation	Persuasion	Quality Control Analysis	Reading Comprehension	Service Orientation	Social Perceptiveness	Speaking	Systems Analysis	Systems Evaluation	Time Management	Writing
Requires a Bachelor's Degree or Higher																							
General and Operations Managers	●	●		●	●					●		●				●		●	●				●
Coaches and Scouts		●			●		●	●	●			●						●	●		●		
Meeting, Convention, and Event Planners		●		●	●							●	●			●	●	●	●			●	
Athletic Trainers	●	●			●		●		●			●				●		●	●				●
Accountants and Auditors ¹¹	●	●			●		●				●	●				●			●	●			●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																							
Massage Therapists	●	●			●			●				●				●	●	●	●				●
Skincare Specialists	●	●		●	●			●				●				●	●	●	●				
Actors	●	●		●	●							●		●		●		●	●				●
Manicurists and Pedicurists	●	●		●	●							●				●	●	●	●			●	
First-Line Supervisors of Production and Operating Workers		●		●	●					●		●				●		●	●			●	●
Requires a High School Diploma or Equivalent or Less																							
Waiters and Waitresses		●		●	●				●			●		●		●	●	●	●				
Combined Food Preparation and Serving Workers, Including Fast Food		●		●	●		●		●				●		●	●	●	●					
Cooks, Restaurant	●	●		●	●		●					●		●				●				●	●
Dishwashers	●	●		●	●	●						●		●		●		●	●				
Food Preparation Workers		●	●	●	●							●				●	●	●	●			●	

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.

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 • Training and Development Managers
Meeting, Convention, and Event Planners	<ul style="list-style-type: none"> • Human Resources Specialists • Marketing Managers • Public Relations and Fundraising Managers
Athletic Trainers	<ul style="list-style-type: none"> • Licensed Practical and Licensed Vocational Nurses • Occupational Therapists • Physical Therapists
Accountants and Auditors	<ul style="list-style-type: none"> • Financial Analysts • Personal Financial Advisors • Risk Management Specialists
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Massage Therapists	<ul style="list-style-type: none"> • Fitness Trainers and Aerobics Instructors • Manicurists and Pedicurists • Teacher Assistants
Skincare Specialists	<ul style="list-style-type: none"> • Dental Assistants • Hairdressers, Hairstylists, and Cosmetologists • Medical Assistants
Actors	<ul style="list-style-type: none"> • Concierges • Retail Salespersons • Singers
Manicurists and Pedicurists	<ul style="list-style-type: none"> • Hairdressers, Hairstylists, and Cosmetologists • Massage Therapists • Skincare Specialists
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
Requires a High School Diploma or Equivalent or Less	
Waiters and Waitresses	<ul style="list-style-type: none"> • Cashiers • Food Servers, Nonrestaurant • Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> • Cooks, Fast Food • Food Preparation Workers • Stock Clerks, Sales Floor
Cooks, Restaurant	<ul style="list-style-type: none"> • Cooks, Institution and Cafeteria • Food Preparation Workers • Packers and Packagers, Hand
Dishwashers	<ul style="list-style-type: none"> • Helpers--Production Workers • Janitors and Cleaners, Except Maids and Housekeeping Cleaners • Landscaping and Groundskeeping Workers
Food Preparation Workers	<ul style="list-style-type: none"> • Food Servers, Nonrestaurant • Maids and Housekeeping Cleaners • Waiters and Waitresses

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 San Francisco Bay Area Economic Sub-Market** employers in the Hospitality and Tourism cluster who posted the most job advertisements during the 120-day period ending March 12, 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 ¹³ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Hilton Hotels & Resorts	47	53	-6	-11.3%
Taco Bell	40	1	39	3,900.0%
Med Travelers	38	29	9	31.0%
Wyndham Hotel Group	38	3	35	1,166.7%
Meritage Resort and SPA	37	5	32	640.0%
Auberge du Soleil	33	18	15	83.3%
Marriott	30	39	-9	-23.1%
Calistoga Ranch	27	15	12	80.0%
Chipotle	24	11	13	118.2%
Solage Calistoga	16	33	-17	-51.5%
Embassy Suites	13	8	5	62.5%
Hyatt	13	10	3	30.0%
G6 Hospitality LLC	12	0	12	—
CLP	11	0	11	—
24 Hour Fitness	10	15	-5	-33.3%
Villagio Inn & Spa	10	5	5	100.0%
The Carneros Inn	10	9	1	11.1%
Mary's Pizza Shack	9	0	9	—
Sheraton Hotels and Resorts	9	0	9	—
Sodexo, Inc.	7	4	3	75.0%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 12, 2015.

¹³ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Lake, Napa, and Sonoma Counties.

Instructional Programs for the Top Hospitality and Tourism Cluster Occupations

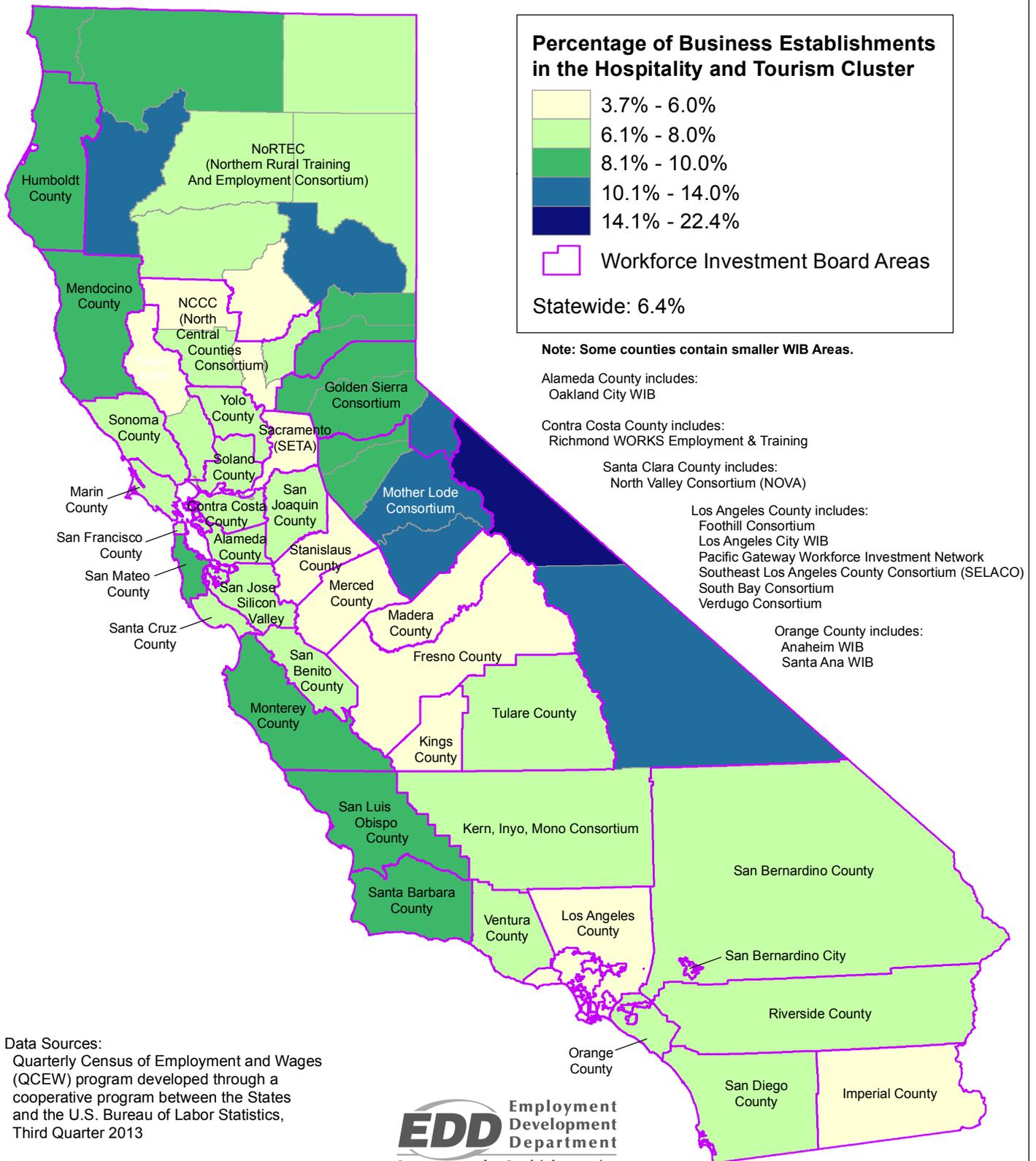
The table below provides examples of instructional programs related to some of the top occupations in the Hospitality and Tourism cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Hospitality and Tourism 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
Massage Therapists	51.3501	Massage Therapy/Therapeutic Massage	126200	Massage Therapy
	51.3502	Asian Bodywork Therapy		
	51.3503	Somatic Bodywork		
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		
Actors	50.0501	Drama and Dramatics/Theatre Arts, General	100700	Dramatic Arts
	50.0506	Acting		
	50.0507	Directing and Theatrical Production		
Manicurists and Pedicurists	12.0401	Cosmetology/Cosmetologist, General	300700	Cosmetology and Barbering
	12.0410	Nail Technician/Specialist and Manicurist		
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](http://www.nces.ed.gov) 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



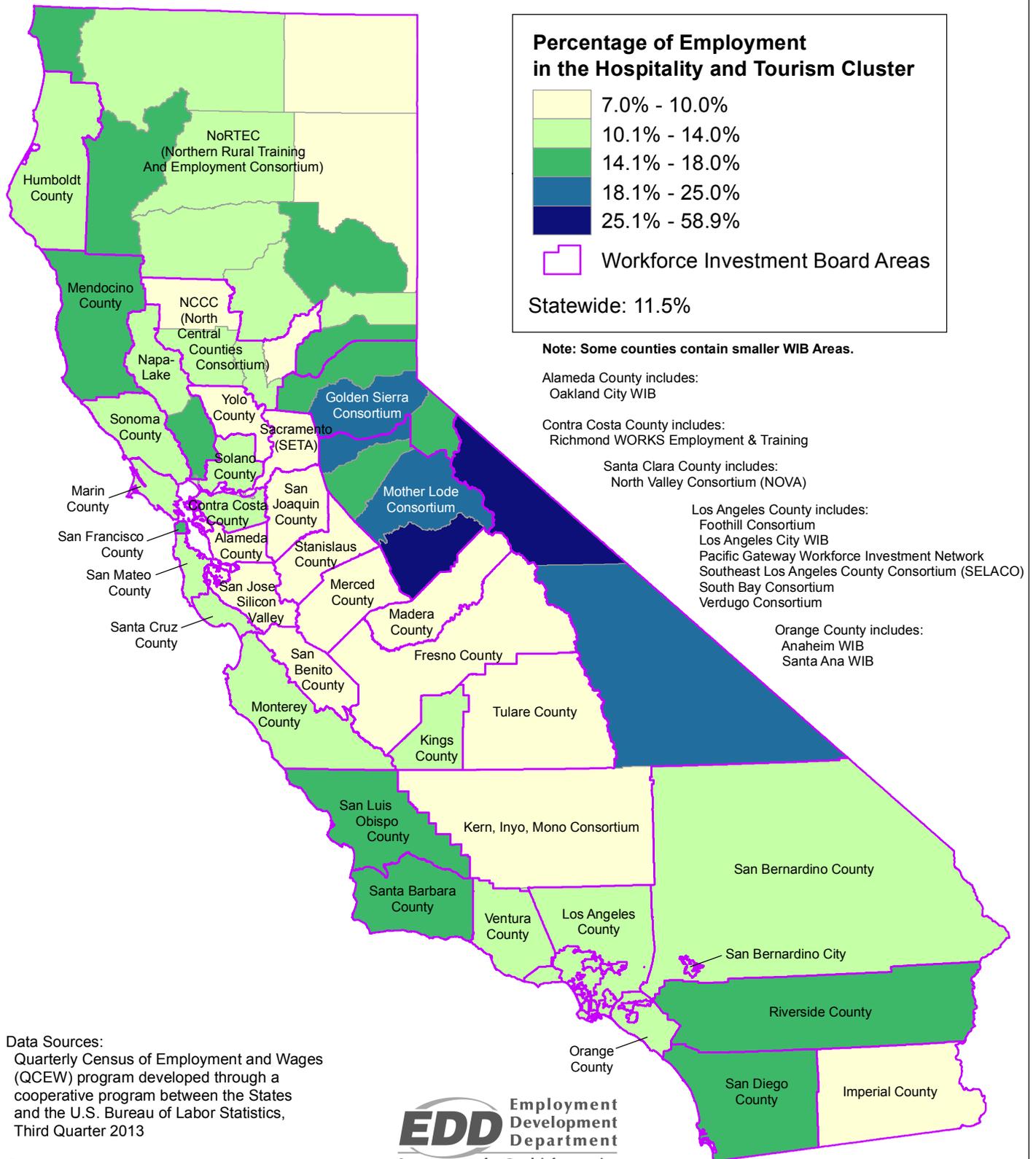
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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



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

Cartography by:
Labor Market Information Division
California Employment Development Department
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July 2014





Occupational Analysis: Agriculture, Food, and Beverage Processing Cluster

San Francisco Bay Area Economic Sub-Market

Lake, Napa, and Sonoma Counties

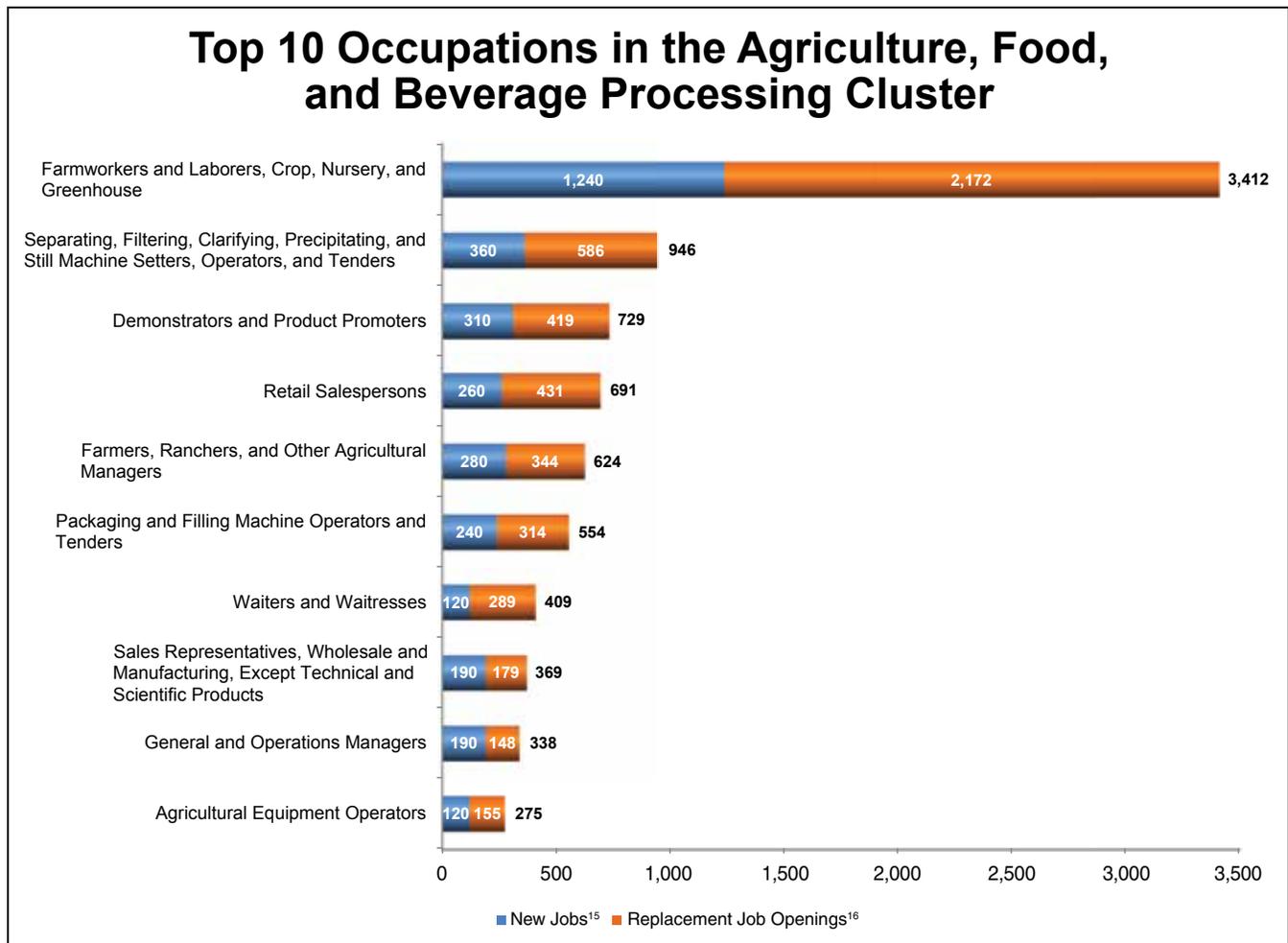
April 2015

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 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 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 San Francisco Bay Area Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent almost two-thirds of the 13,736 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.¹⁴



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.

¹⁴ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹⁵ 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.

¹⁶ 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 Lake, Napa, and Sonoma Counties.

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

The table below further profiles the San Francisco Bay Area 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 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 ¹⁷ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ¹⁸	HWOL Job Ads ¹⁹ (120 days)
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	3,412	\$10.88	\$22,639	Less than high school	41
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	946	\$18.46	\$38,391	High school diploma or equivalent	40
Demonstrators and Product Promoters	729	\$14.78	\$30,762	High school diploma or equivalent	172
Retail Salespersons	691	\$12.05	\$25,077	Less than high school	603
Farmers, Ranchers, and Other Agricultural Managers	624	\$41.70	\$86,736	High school diploma or equivalent	43
Packaging and Filling Machine Operators and Tenders	554	\$15.94	\$33,161	High school diploma or equivalent	9
Waiters and Waitresses	409	\$9.31	\$19,373	Less than high school	284
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	369	\$31.02	\$64,522	High school diploma or equivalent	235
General and Operations Managers	338	\$47.13	\$98,027	Bachelor's degree	96
Agricultural Equipment Operators	275	\$13.65	\$28,387	Less than high school	11

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 March 12, 2015.

¹⁷ Total job openings are the sum of new jobs and replacement job openings.

¹⁸ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

¹⁹ 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 Lake, Napa, and Sonoma Counties.

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 San Francisco Bay Area 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 ²⁰ (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	338	\$47.13	\$98,027	96
Industrial Production Managers	161	\$52.52	\$109,231	23
Market Research Analysts and Marketing Specialists	157	\$34.01	\$70,742	49
Accountants and Auditors	136	\$33.57	\$69,831	328
Sales Managers	89	\$47.29	\$98,371	103
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
First-Line Supervisors of Production and Operating Workers	158	\$28.80	\$59,915	304
Agricultural and Food Science Technicians	74	\$17.63	\$36,674	10
Heavy and Tractor-Trailer Truck Drivers	61	\$22.51	\$46,802	255
Computer, Automated Teller, and Office Machine Repairers	2	\$18.82	\$39,151	3
Industrial Engineering Technicians	2	\$31.32	\$65,153	47
Requires a High School Diploma or Equivalent or Less				
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	3,412	\$10.88	\$22,639	41
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	946	\$18.46	\$38,391	40
Demonstrators and Product Promoters	729	\$14.78	\$30,762	172
Retail Salespersons	691	\$12.05	\$25,077	603
Farmers, Ranchers, and Other Agricultural Managers	624	\$41.70	\$86,736	43

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 March 12, 2015.

²⁰ Total job openings are the sum of new jobs and replacement job openings.

** This Economic Sub-Market includes Lake, Napa, and Sonoma Counties.

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. Critical thinking and monitoring are the most commonly shared skills, followed by active listening 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	Instructing	Judgment and Decision Making	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Repairing	Science	Service Orientation	Social Perceptiveness	Speaking	Systems Analysis	Systems Evaluation	Time Management	Troubleshooting	Writing
Requires a Bachelor's Degree or Higher																											
General and Operations Managers	●	●	●	●				●		●						●					●	●					●
Industrial Production Managers	●	●	●	●			●	●		●						●						●			●		
Market Research Analysts and Marketing Specialists	●	●			●		●			●						●						●	●	●			●
Accountants and Auditors ²¹	●	●			●		●		●	●						●						●	●				●
Sales Managers				●	●		●	●		●					●						●	●			●		●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																											
First-Line Supervisors of Production and Operating Workers		●		●	●			●		●						●					●	●			●		●
Agricultural and Food Science Technicians ²²	●	●	●	●						●	●					●		●				●					●
Heavy and Tractor-Trailer Truck Drivers		●	●	●	●						●		●	●		●						●			●		
Computer, Automated Teller, and Office Machine Repairers	●	●			●					●		●	●			●	●					●				●	
Industrial Engineering Technicians		●	●	●			●		●	●						●						●	●				●
Requires a High School Diploma or Equivalent or Less																											
Farmworkers and Laborers, Crop, Nursery, and Greenhouse ²³		●		●	●	●	●	●		●		●	●				●										
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders		●		●	●		●				●		●	●		●	●										●
Demonstrators and Product Promoters	●	●		●	●						●				●	●					●	●					●
Retail Salespersons		●		●							●	●			●	●				●	●	●					●
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.

²¹ Skills represent Accountants, a specialty occupation of Accountants and Auditors.

²² Skills represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

²³ Skills represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

Work Activities in the Agriculture, Food, and Beverage Processing Cluster

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 establishing and maintaining interpersonal relationships; making decisions and solving problems; organizing, planning, and prioritizing work; and communicating with supervisors, peers, or subordinates.

Occupations	Work Activities																																	
	Analyzing Data or Information	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	Drafting, Laying Out, and Specifying Technical Devices, Parts, and Equipment	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																																		
General and Operations Managers			●	●		●	●								●		●										●	●		●				
Industrial Production Managers				●		●	●				●				●	●	●			●								●	●					
Market Research Analysts and Marketing Specialists	●		●	●			●	●				●			●					●			●										●	
Accountants and Auditors ²⁴	●			●			●	●	●						●					●	●		●										●	
Sales Managers		●	●	●		●	●				●				●					●							●		●					
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																																		
First-Line Supervisors of Production and Operating Workers		●		●	●	●	●				●	●												●				●	●					
Agricultural and Food Science Technicians ²⁵								●			●	●			●	●			●		●	●							●				●	
Heavy and Tractor-Trailer Truck Drivers				●			●	●			●	●	●		●				●	●		●												
Computer, Automated Teller, and Office Machine Repairers			●				●				●			●	●					●				●		●					●			●
Industrial Engineering Technicians			●	●		●	●				●				●	●				●									●					●
Requires a High School Diploma or Equivalent or Less																																		
Farmworkers and Laborers, Crop, Nursery, and Greenhouse ²⁶				●		●	●	●	●	●	●								●		●										●		●	
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders				●		●					●	●	●		●	●			●		●													●
Demonstrators and Product Promoters		●	●			●					●				●				●		●							●	●					●
Retail Salespersons		●	●			●					●				●				●		●							●	●					●
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.

²⁴ Work Activities represent Accountants, a specialty occupation of Accountants and Auditors.

²⁵ Work Activities represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

²⁶ Work Activities represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

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
Industrial Production Managers	<ul style="list-style-type: none"> • General and Operations Managers • Power Distributors and Dispatchers • Industrial Engineers
Market Research Analysts and Marketing Specialists	<ul style="list-style-type: none"> • Financial Analysts • Regulatory Affairs Specialists • Risk Management Specialists
Accountants and Auditors	<ul style="list-style-type: none"> • Auditors • Financial Analysts • Personal Financial Advisors
Sales Managers	<ul style="list-style-type: none"> • Financial Managers Branch or Department • Logistics Managers • Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
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
Agricultural and Food Science Technicians	<ul style="list-style-type: none"> • Precision Agriculture Technicians • Pharmacy Technicians • Medical and Clinical Laboratory Technicians
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
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> • Cashiers • Statement Clerks • Tellers
Industrial Engineering Technicians	<ul style="list-style-type: none"> • Electronics Engineering Technologists • Manufacturing Production Technicians • Validation Engineers
Requires a High School Diploma or Equivalent or Less	
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	<ul style="list-style-type: none"> • Construction Laborers • Janitors and Cleaners, Except Maids and Housekeeping Cleaners • Landscaping and Grounds keeping Workers
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	<ul style="list-style-type: none"> • Chemical Plant and System Operators • Chemical Equipment Operators and Tenders • Mixing and Blending Machine Setters, Operators, and Tenders
Demonstrators and Product Promoters	<ul style="list-style-type: none"> • Hotel, Motel, and Resort Desk Clerks • Receptionists and Information Clerks • Retail Salespersons
Retail Salespersons	<ul style="list-style-type: none"> • Bartenders • Concierges • Hotel, Motel and Resort Desk Clerks
Farmers, Ranchers, and Other Agricultural Managers	<ul style="list-style-type: none"> • Aquacultural Managers • Farm and Ranch Managers • Nursery and Greenhouse Managers

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 San Francisco Bay Area Economic Sub-Market** employers in the Agriculture, Food, and Beverage Processing cluster who posted the most job advertisements during the 120-day period ending March 12, 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.

Agriculture, Food, and Beverage Processing Cluster Employers	Recent Job Advertisements ²⁷ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Constellation Brands, Inc.	87	18	69	383.3%
Perdue Farms, Inc.	79	24	55	229.2%
Trincherro Family Estates	30	20	10	50.0%
Kendall Jackson	27	42	-15	-35.7%
Domaine Chandon	25	12	13	108.3%
Kendall Jackson Vineyard Estate	14	2	12	600.0%
Delicato Family Vineyards	13	20	-7	-35.0%
Jarden Corporation	10	0	10	—
Amy's Kitchen	9	12	-3	-25.0%
F. Korbel & Bros., Inc.	8	6	2	33.3%
Rutherford Wine Company	8	2	6	300.0%
Dr Pepper Snapple Group	7	13	-6	-46.2%
Cakebread Cellars	7	3	4	133.3%
Ste Michelle Wine Estates	7	2	5	250.0%
Diageo Chateau & Estate Wines	7	0	7	—
Coca-Cola Refreshments	6	3	3	100.0%
Gundlach Bundschu Winery	6	1	5	500.0%
Landmark Vineyards	6	0	6	—
Korbel Champagne Cellars	5	3	2	66.7%
E. & J. Gallo Winery	5	12	-7	-58.3%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 12, 2015.

²⁷ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Lake, Napa, and Sonoma Counties.

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

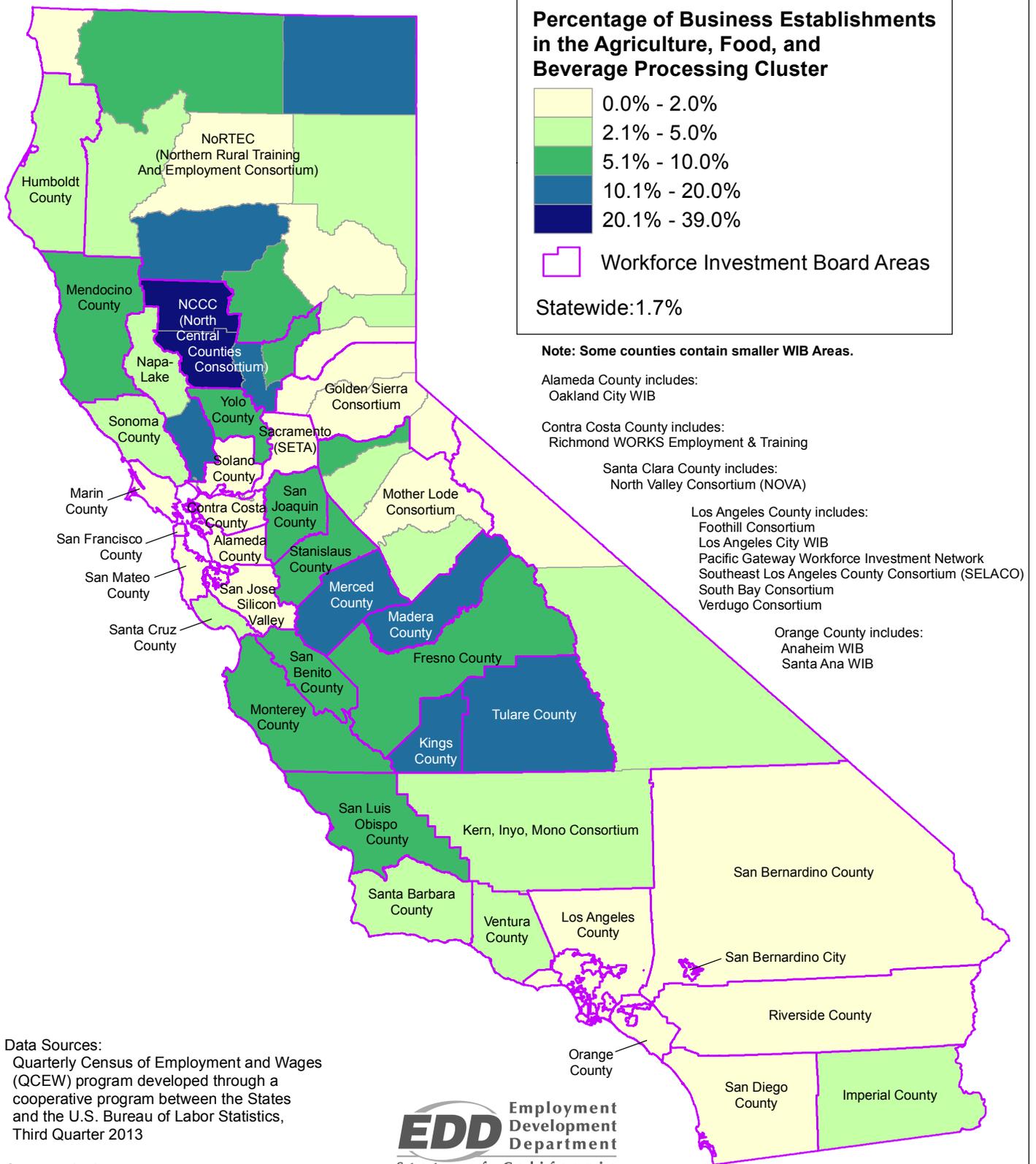
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Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A
Agricultural and Food Science Technicians	01.1002	Food Technology and Processing	011300	Food Processing and Related Technologies
Heavy and Tractor-Trailer Truck Drivers	49.0205	Truck and Bus Driver/ Commercial Vehicle Operator and Instructor	094750	Truck and Bus Driving
Computer, Automated Teller, and Office Machine Repairers	47.0102 47.0104	Business Machine Repair Computer Installation and Repair Technology/Technician	093410	Computer Electronics
Industrial Engineering Technicians	15.0612	Industrial Technology/ Technician	095050	Aircraft Fabrication
	15.0613	Manufacturing Engineering Technology/Technician	095600	Manufacturing and Industrial Technology
	15.0699	Industrial Production Technologies/Technicians, Other		
Demonstrators and Product Promoters	52.1803	Retailing and Retail Operations	N/A	N/A
Farmers, Ranchers, and Other Agricultural Managers	N/A	N/A	010900 010930 011200	Horticulture Nursery Technology Agriculture Business, Sales and Service

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 7th Edition \(2010\)](http://www.cccco.edu), www.cccco.edu.

California Agriculture, Food, and Beverage Processing Cluster

Percentage of Total County Establishments, 2013



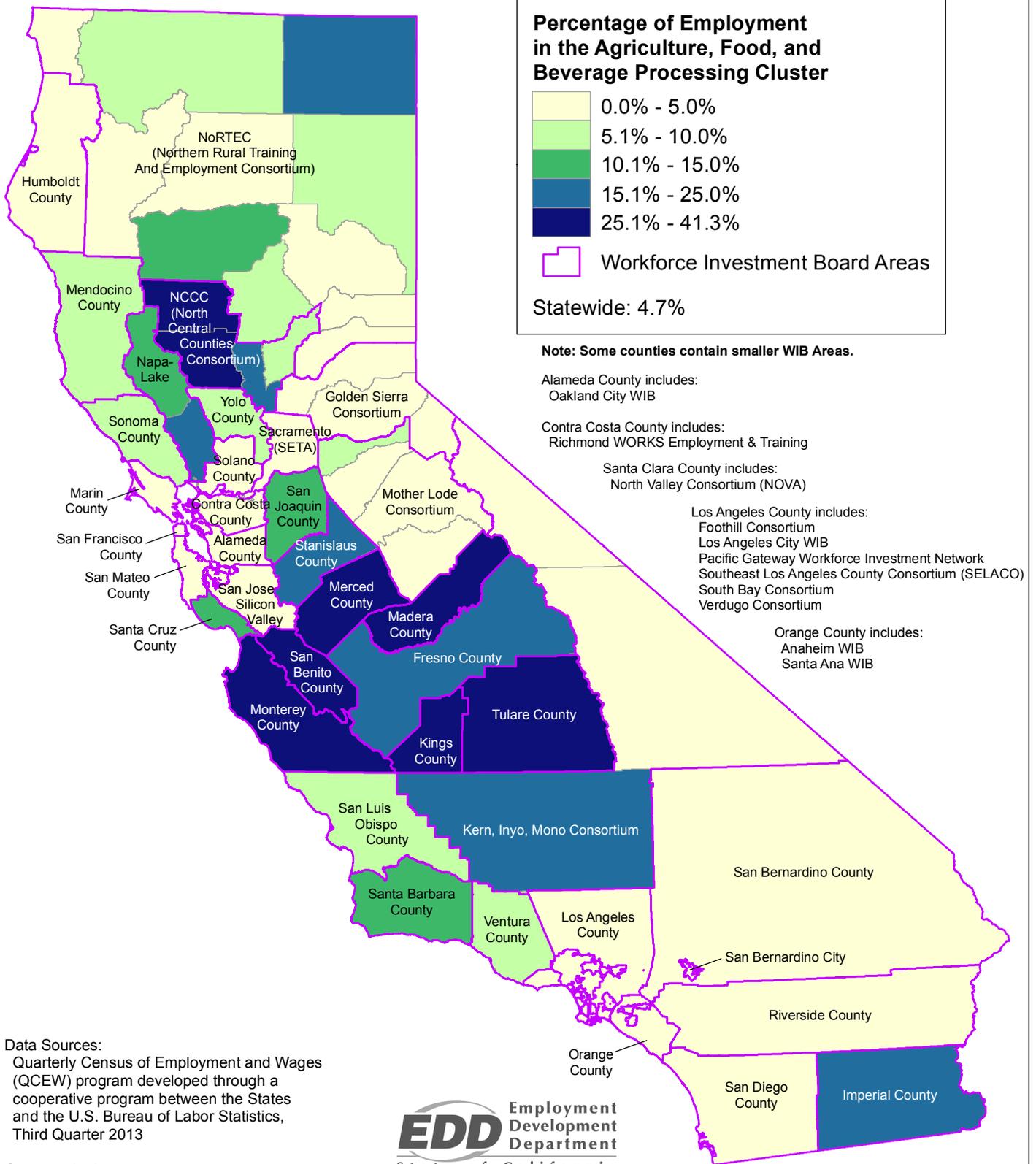
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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



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

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





Occupational Analysis: Retail Cluster

San Francisco Bay Area Economic Sub-Market
Lake, Napa, and Sonoma Counties

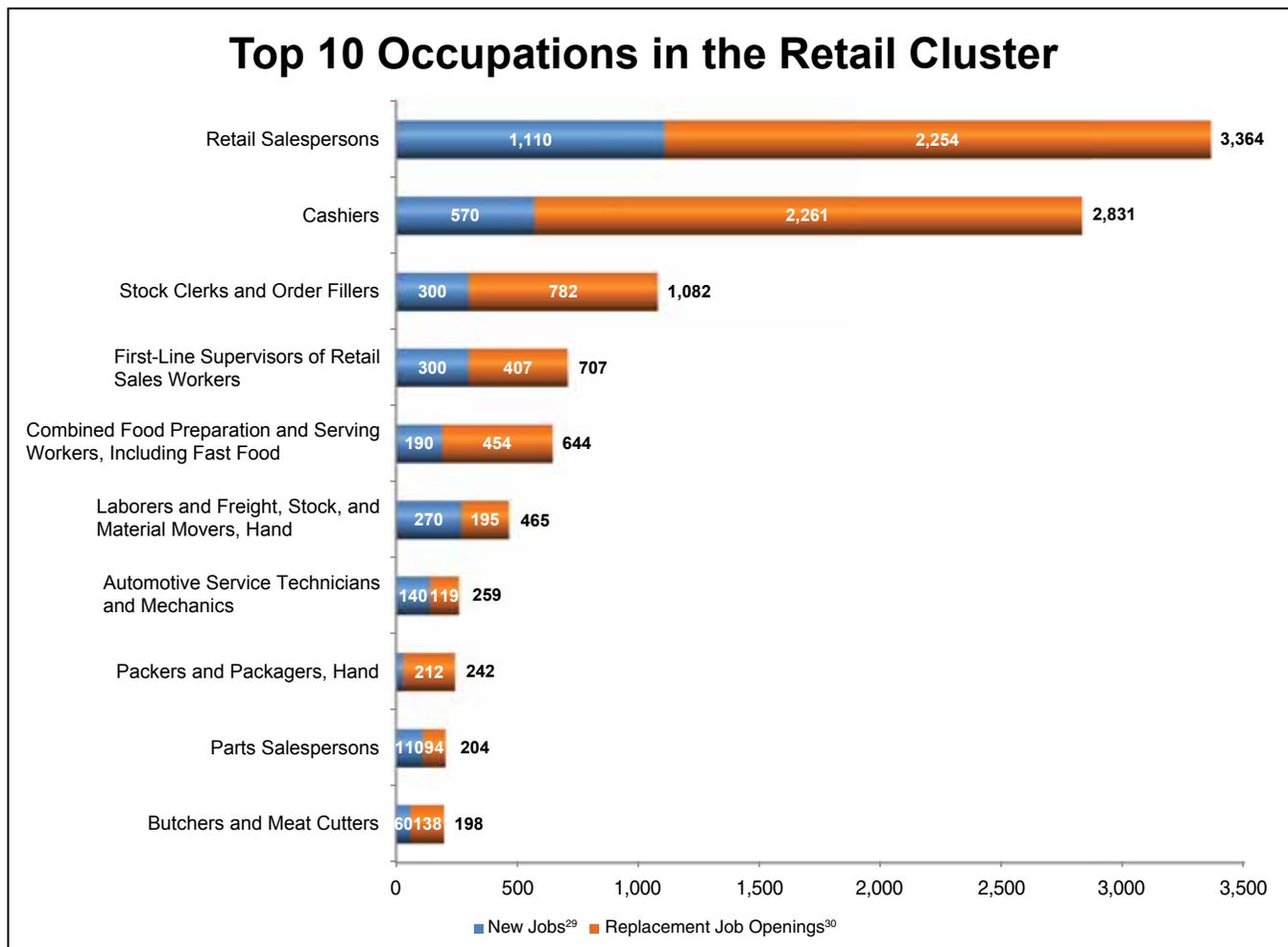
April 2015

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 San Francisco Bay Area Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent more than three-quarters of the 12,781 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.²⁸



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.

²⁸ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

²⁹ 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.

³⁰ 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 Retail Cluster

The table below further profiles the San Francisco Bay Area 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 ³¹ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ³²	HWOL Job Ads ³³ (120 days)
Retail Salespersons	3,364	\$12.05	\$25,077	Less than high school	603
Cashiers	2,831	\$11.79	\$24,524	Less than high school	186
Stock Clerks and Order Fillers	1,082	\$13.00	\$27,045	Less than high school	177
First-Line Supervisors of Retail Sales Workers	707	\$19.92	\$41,425	High school diploma or equivalent	493
Combined Food Preparation and Serving Workers, Including Fast Food	644	\$9.72	\$20,221	Less than high school	250
Laborers and Freight, Stock, and Material Movers, Hand	465	\$13.85	\$28,810	Less than high school	144
Automotive Service Technicians and Mechanics	259	\$20.48	\$42,603	High school diploma or equivalent	136
Packers and Packagers, Hand	242	\$9.91	\$20,614	Less than high school	4
Parts Salespersons	204	\$14.96	\$31,127	Less than high school	18
Butchers and Meat Cutters	198	\$16.01	\$33,317	Less than high school	3

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 March 12, 2015.

³¹ Total job openings are the sum of new jobs and replacement job openings.

³² U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

³³ 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 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 San Francisco Bay Area 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 ³⁴ (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	150	\$47.13	\$98,027	96
Sales Managers	89	\$47.29	\$98,371	103
Pharmacists	63	\$67.77	\$140,956	70
Loan Officers	19	\$34.73	\$72,239	160
Accountants and Auditors	16	\$33.57	\$69,831	328
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Heavy and Tractor-Trailer Truck Drivers	26	\$22.51	\$46,802	255
First-Line Supervisors of Production and Operating Workers	17	\$28.80	\$59,915	304
Electronic Home Entertainment Equipment Installers and Repairers	7	N/A	N/A	6
Electronic Equipment Installers and Repairers, Motor Vehicles	6	N/A	N/A	3
Telecommunications Equipment Installers and Repairers, Except Line Installers	3	\$23.23	\$48,306	44
Requires a High School Diploma or Equivalent or Less				
Retail Salespersons	3,364	\$12.05	\$25,077	603
Cashiers	2,831	\$11.79	\$24,524	186
Stock Clerks and Order Fillers	1,082	\$13.00	\$27,045	177
First-Line Supervisors of Retail Sales Workers	707	\$19.92	\$41,425	493
Combined Food Preparation and Serving Workers, Including Fast Food	644	\$9.72	\$20,221	250

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³⁴ 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 and speaking are the most commonly shared skills, followed by reading comprehension and active listening. 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	Installation	Instructing	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	Service Orientation	Social Perceptiveness	Speaking	Systems Analysis	Time Management	Troubleshooting	Writing
Requires a Bachelor's Degree or Higher																												
General and Operations Managers	●	●		●	●						●	●							●				●	●				●
Sales Managers				●	●			●		●		●					●						●	●		●		●
Pharmacists	●	●			●			●				●							●		●		●	●				●
Loan Officers	●	●	●		●				●		●								●			●		●				●
Accountants and Auditors ³⁵	●	●			●				●		●	●							●					●	●			●
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		●		●	●						●	●							●				●	●		●		●
Electronic Home Entertainment Equipment Installers and Repairers	●	●	●		●														●	●	●		●				●	
Electronic Equipment Installers and Repairers, Motor Vehicles		●			●	●	●					●				●			●	●				●			●	
Telecommunications Equipment Installers and Repairers, Except Line Installers		●	●		●							●				●			●	●	●			●			●	
Requires a High School Diploma or Equivalent or Less																												
Retail Salespersons		●			●								●	●				●	●			●	●	●				●
Cashiers		●		●	●								●						●			●	●	●		●		●
Stock Clerks and Order Fillers ³⁶		●		●	●						●								●			●	●	●		●		●
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.

³⁵ Skills represent Accountants, a specialty occupation of Accountants and Auditors.

³⁶ Skills represent Order Fillers, Wholesale and Retail Sales; 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; organizing, planning, and prioritizing work; handling and moving objects; and making decisions and solving.

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	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	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																															
General and Operations Managers				●	●		●	●							●		●									●	●		●		
Sales Managers			●	●	●		●	●			●			●						●						●		●			
Pharmacists	●	●					●	●				●			●					●		●		●							●
Loan Officers				●			●		●					●						●		●		●		●					●
Accountants and Auditors ³⁷	●				●		●	●	●					●						●	●		●								●
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		●		●	●	●	●				●	●												●		●	●				
Electronic Home Entertainment Equipment Installers and Repairers							●				●	●		●	●				●			●			●				●	●	
Electronic Equipment Installers and Repairers, Motor Vehicles					●		●		●		●				●				●			●		●			●			●	●
Telecommunications Equipment Installers and Repairers, Except Line Installers			●				●				●				●				●		●	●		●			●		●	●	
Requires a High School Diploma or Equivalent or Less																															
Retail Salespersons			●	●			●				●			●					●		●						●	●		●	
Cashiers			●	●			●	●			●			●						●	●					●	●				
Stock Clerks and Order Fillers ³⁸			●				●	●	●		●	●		●							●			●			●				●
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.

³⁷ Work Activities represent Accountants, a specialty occupation of Accountants and Auditors.

³⁸ Work Activities represent Order Fillers, Wholesale and Retail Sales; 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	
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 • Logistics Managers • Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Pharmacists	<ul style="list-style-type: none"> • Health Specialties Teachers, Postsecondary • Medical Scientists, Except Epidemiologists • Nursing Instructors and Teachers, Postsecondary
Loan Officers	<ul style="list-style-type: none"> • Customs Brokers • Personal Financial Advisors • Sales Agents, Financial Services
Accountants and Auditors	<ul style="list-style-type: none"> • Auditors • Financial Analysts • Personal Financial Advisors
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
Electronic Home Entertainment Equipment Installers and Repairers	<ul style="list-style-type: none"> • Computer User Support Specialists • Electrical Engineering Technicians • Medical Equipment Repairers
Electronic Equipment Installers and Repairers, Motor Vehicles	<ul style="list-style-type: none"> • Automotive Master Mechanics • Automotive Specialty Technicians • Elevator Installers and Repairers
Telecommunications Equipment Installers and Repairers, Except Line Installers	<ul style="list-style-type: none"> • Electricians • Heating and Air Conditioning Mechanics and Installers • Electrical and Electronics Repairers, Commercial and Industrial Equipment
Requires a High School Diploma or Equivalent or Less	
Retail Salespersons	<ul style="list-style-type: none"> • Bartenders • Concierges • Hotel, Motel and Resort Desk Clerks
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
Stock Clerks and Order Fillers	<ul style="list-style-type: none"> • Food Servers, Nonrestaurant • Janitors and Cleaners, Except Maids and Housekeeping Cleaners • Stock Clerks, Sales Floor
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 • Waiters and Waitresses

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 San Francisco Bay Area Economic Sub-Market** employers in the Retail cluster who posted the most job advertisements during the 120-day period ending March 12, 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 ³⁹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Safeway Companies	160	8	152	1,900.0%
Whole Foods	79	102	-23	-22.5%
Macy's	63	36	27	75.0%
Home Depot	50	14	36	257.1%
Sears Holdings Corporation	49	110	-61	-55.5%
Dick's Sporting Goods, Inc.	48	32	16	50.0%
Dollar Tree Stores, Inc.	38	7	31	442.9%
State Of California	36	10	26	260.0%
Target Corporation	34	16	18	112.5%
Gap, Inc.	22	34	-12	-35.3%
Office Depot	19	17	2	11.8%
Staples	14	17	-3	-17.6%
Rite Aid	14	10	4	40.0%
Petaluma Market	12	0	12	—
Lowe's	11	12	-1	-8.3%
The Dollar General	9	13	-4	-30.8%
Toys"R"Us	8	9	-1	-11.1%
Pharmaca Integrative Pharmacy	8	6	2	33.3%
American Greetings Corporation	8	0	8	—
Kmart	7	2	5	250.0%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 12, 2015.

³⁹ Totals do not include employers with anonymous job advertisements.

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Instructional Programs for the Retail Cluster Occupations

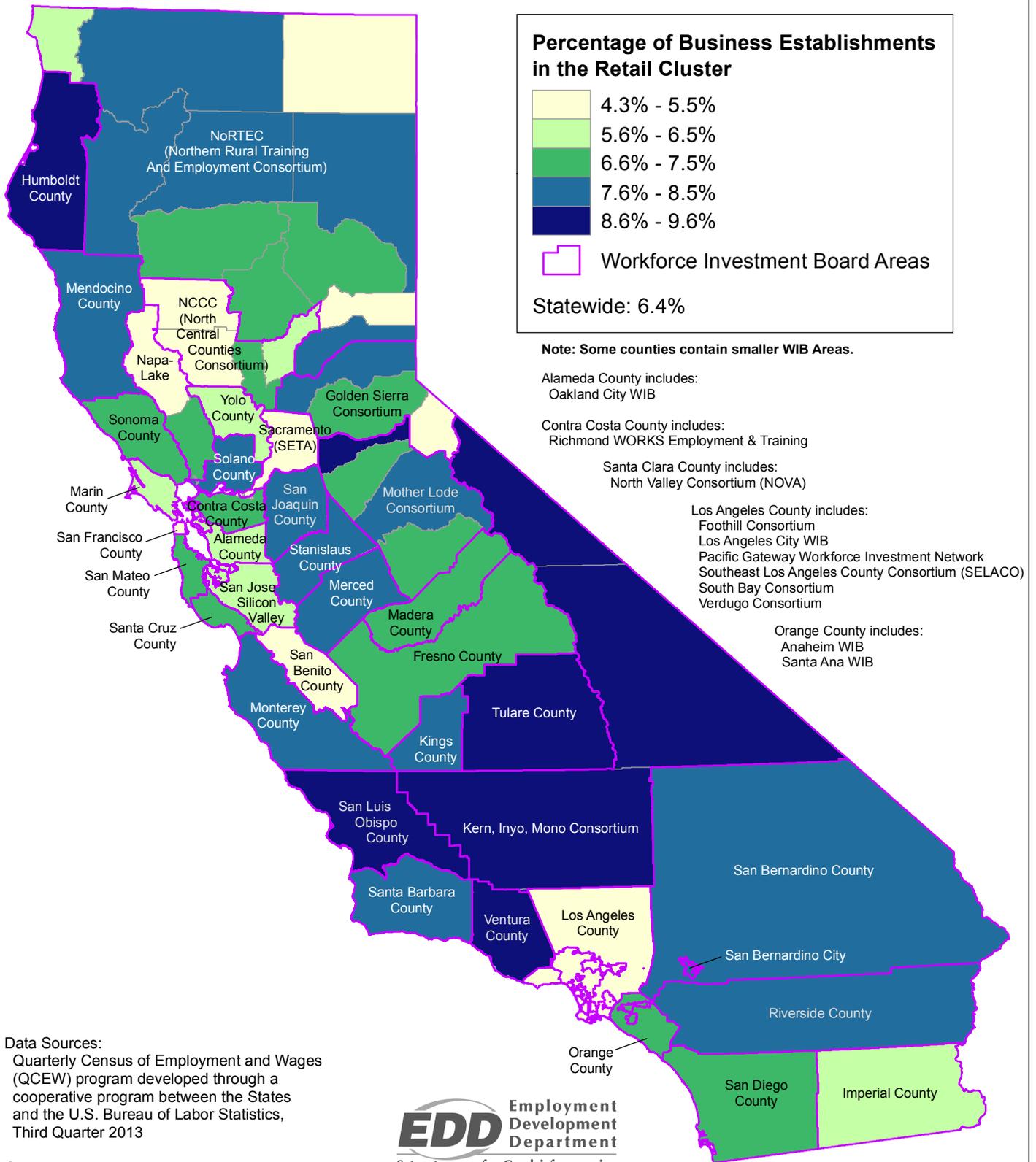
The table below provides examples of instructional programs related to some of the top occupations in the Retail cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Retail cluster. 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
Electrical and Electronics Installers and Repairers, Transportation Equipment	47.0604	Automobile/Automotive Mechanics Technology/Technician	094800	Automotive Technology
First-Line Supervisors of Retail Sales Workers	19.0203	Consumer Merchandising/Retailing Management	050650	Retail Store Operations and Management
	52.0208	E-Commerce/Electronic Commerce	050940	Sales and Salesmanship
	52.0212	Retail Management	050960	Display

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](http://www.nces.ed.gov) 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



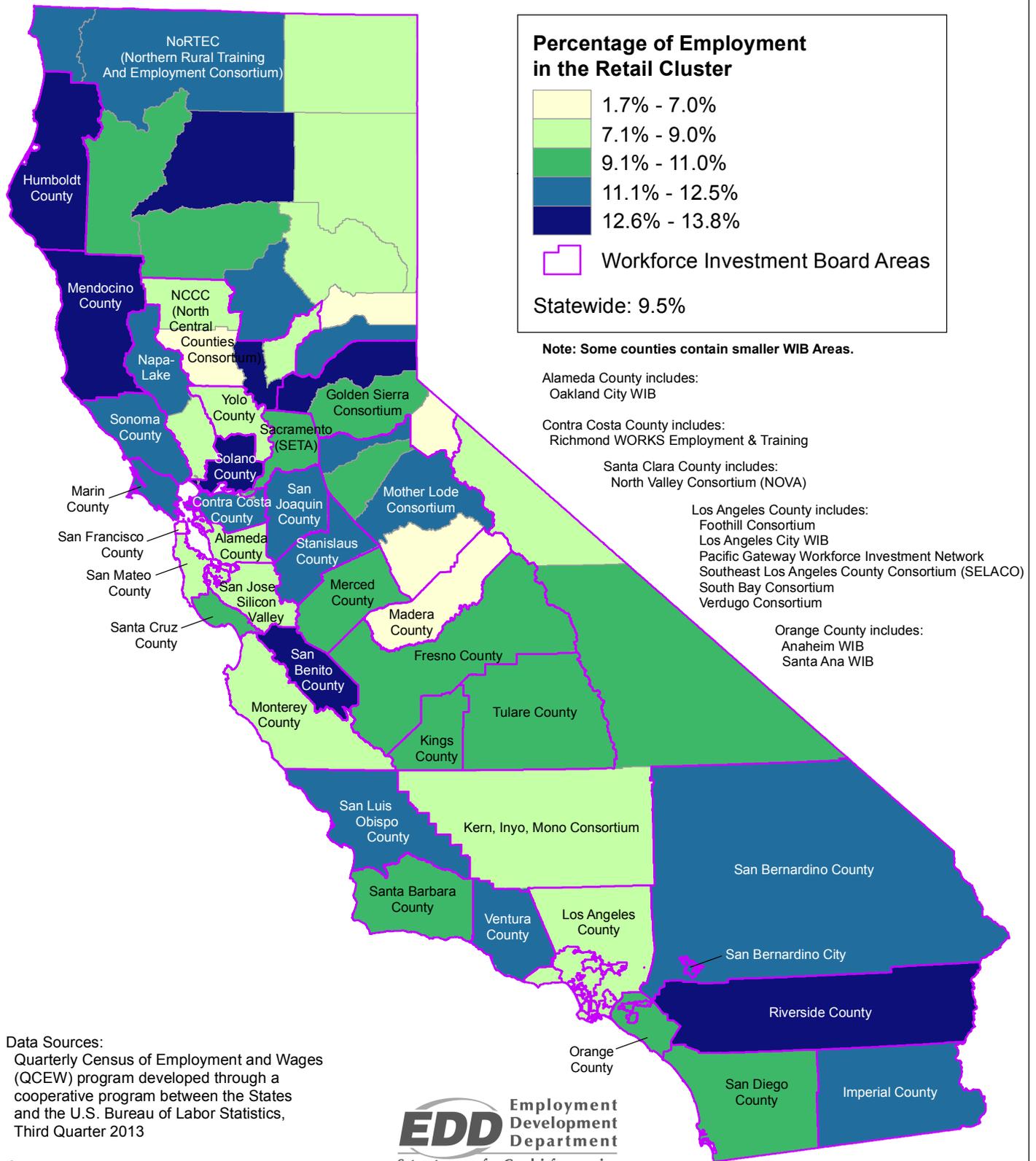
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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



California Retail 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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