

Regional Economic Analysis Profile

San Francisco Bay Area Economic Sub-Market
Alameda, Contra Costa, and Solano Counties

March 2015



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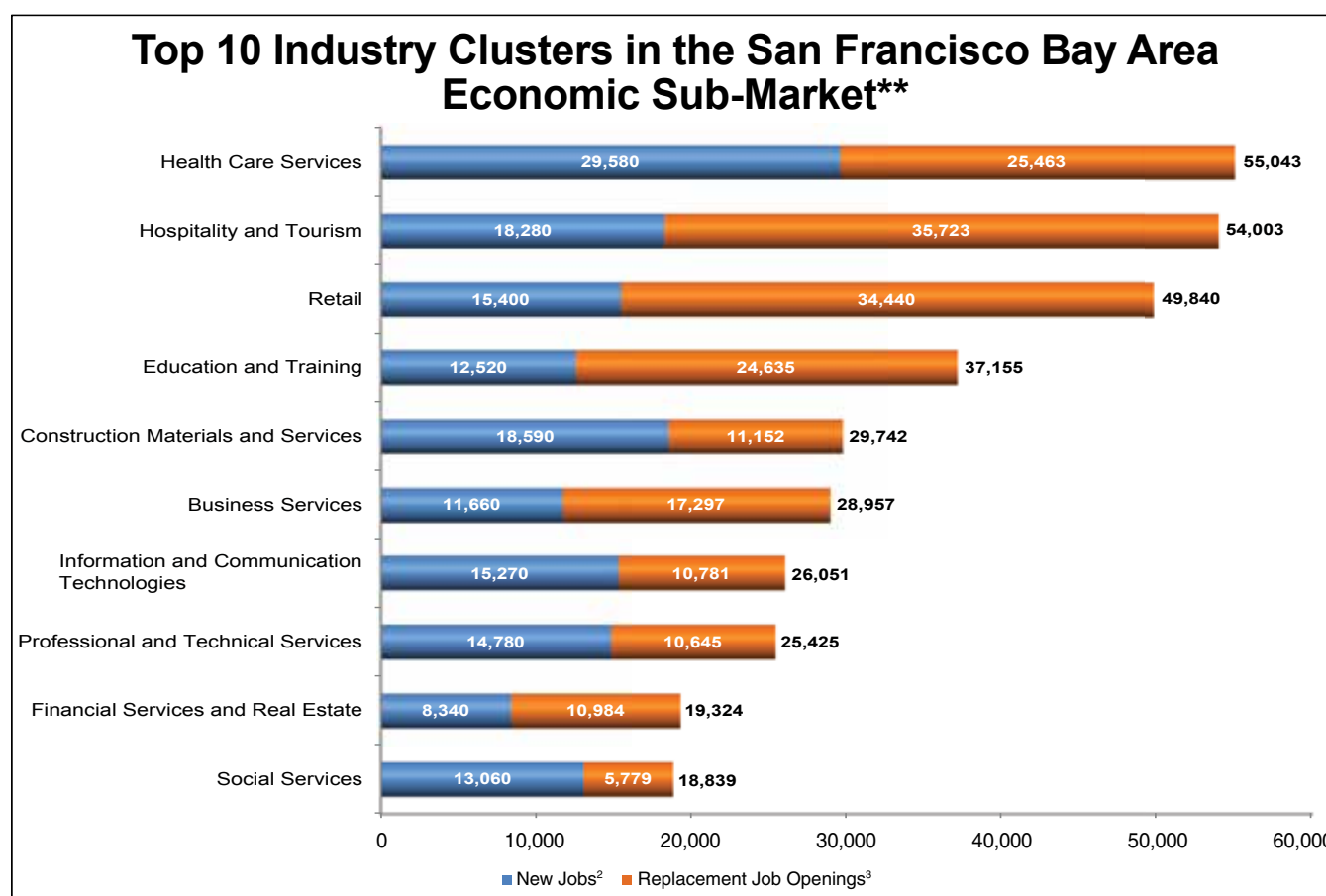
SUMMARY OF THE SAN FRANCISCO BAY AREA ECONOMIC SUB-MARKET INDUSTRY CLUSTERS

What is an Industry Cluster?

Industry clusters are groups of associated industries in an economic sub-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 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 job openings in the cluster.

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 130,000 people in the economic sub-market during 2013-2014,* accounting for 12.3 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
- Nursing Care Facilities (Skilled Nursing Facilities)
- Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
- Offices of Physicians

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 110,000 workers, or 10.4 percent of the economic sub-market's employment. Industries within this cluster with the most projected job openings include:

- Restaurants and Other Eating Places
- Other Amusement and Recreation Industries
- Traveler Accommodation
- Special Food Services
- Amusement Parks and Arcades

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 113,000 workers, or 10.7 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
- Department Stores
- Building Material and Supplies Dealers
- Automobile Dealers

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 101,000 people in the economic sub-market, accounting for 9.5 percent of the workforce. Top industries within this cluster include:

- Elementary and Secondary Schools
- Colleges, Universities, and Professional Schools
- Other Schools and Instruction
- Junior Colleges
- Educational Support Services

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,* nearly 67,000 workers made up the cluster's employment, representing 6.3 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
- Foundation, Structure, and Building Exterior Contractors
- Other Specialty Trade Contractors

* 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 **Business Services** industry cluster is comprised of industries that include temporary help agencies, employer organizations, janitorial services, security systems services, and carpet cleaning establishments. This cluster employed more than 89,000 people during 2013-2014,* or 8.4 percent of the economic sub-market's workforce. Top industries in this cluster include:

- Management of Companies and Enterprises
- Employment Services
- Services to Buildings and Dwellings
- Investigation and Security Services
- Office Administrative Services

The **Information and Communication Technologies** industry cluster includes interdependent industries related to computers and peripheral equipment, as well as software design and manufacturing, computer programming services, installation services, and wireless telecommunications carriers. For 2013-2014,* this cluster employed more than 59,000 workers, or 5.6 percent of the economic sub-market's total employment. Industries with the highest number of expected job openings include:

- Computer Systems Design and Related Services
- Semiconductor and Other Electronic Component Manufacturing
- Wholesale Electronic Markets and Agents and Brokers
- Software Publishers
- Wired Telecommunications Carriers

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 51,000 people were employed in the economic sub-market, or 4.8 percent of the workforce. Top industries within this cluster include:

- Management, Scientific, and Technical Consulting Services
- Architectural, Engineering, and Related Services
- Legal Services
- Other Professional, Scientific, and Technical Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services

The **Financial Services and Real Estate** industry cluster includes commercial banks, savings institutions, credit unions, credit card companies, insurance firms, and real estate appraisers or property management companies. In total, the cluster employed nearly 50,000 people, which accounted for 4.7 percent of the economic sub-market's workforce in 2013-2014.* Industries showing the highest projected job openings include:

- Depository Credit Intermediation
- Insurance Carriers
- Agencies, Brokerages, and Other Insurance Related Activities
- Other Financial Investment Activities
- Activities Related to Credit Intermediation

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 48,000 people and accounted for 4.5 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

* 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.**

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

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

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

Retail (Continued)

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

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

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INDUSTRY CLUSTER DEFINITIONS

Construction Materials and Services (Continued)

- 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

Information and Communication Technologies

- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications Equipment Manufacturing
- 3344 Semiconductor and Other Electronic Component Manufacturing
- 3359 Other Electrical Equipment and Component Manufacturing
- 4251 Wholesale Electronic Markets and Agents and Brokers
- 5112 Software Publishers
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5174 Satellite Telecommunications
- 5179 Other Telecommunications
- 5182 Data Processing, Hosting, and Related Services
- 5191 Other Information Services
- 5415 Computer Systems Design and Related Services
- 8112 Electronic and Precision Equipment Repair and Maintenance

Professional and Technical Services

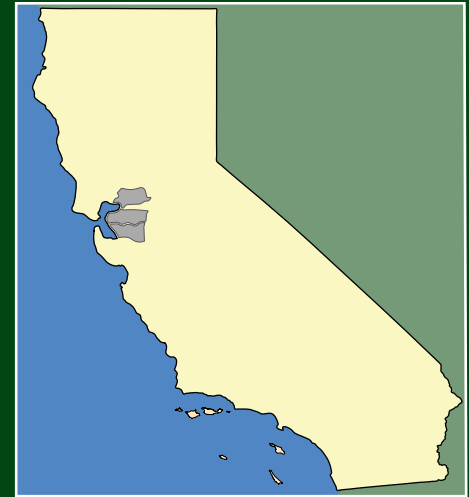
- 5411 Legal Services
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5418 Advertising, Public Relations, and Related Services
- 5419 Other Professional, Scientific, and Technical Services

Financial Services and Real Estate

- 5211 Monetary Authorities-Central Bank
- 5221 Depository Credit Intermediation
- 5222 Nondepository Credit Intermediation
- 5223 Activities Related to Credit Intermediation
- 5231 Securities and Commodity Contracts Intermediation and Brokerage
- 5232 Securities and Commodity Exchanges
- 5239 Other Financial Investment Activities
- 5241 Insurance Carriers
- 5242 Agencies, Brokerages, and Other Insurance Related Activities
- 5251 Insurance and Employee Benefit Funds
- 5259 Other Investment Pools and Funds
- 5311 Lessors of Real Estate
- 5312 Offices of Real Estate Agents and Brokers
- 5313 Activities Related to Real Estate

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



Occupational Analysis: Health Care Services Cluster

San Francisco Bay Area Economic Sub-Market
Alameda, Contra Costa, and Solano Counties

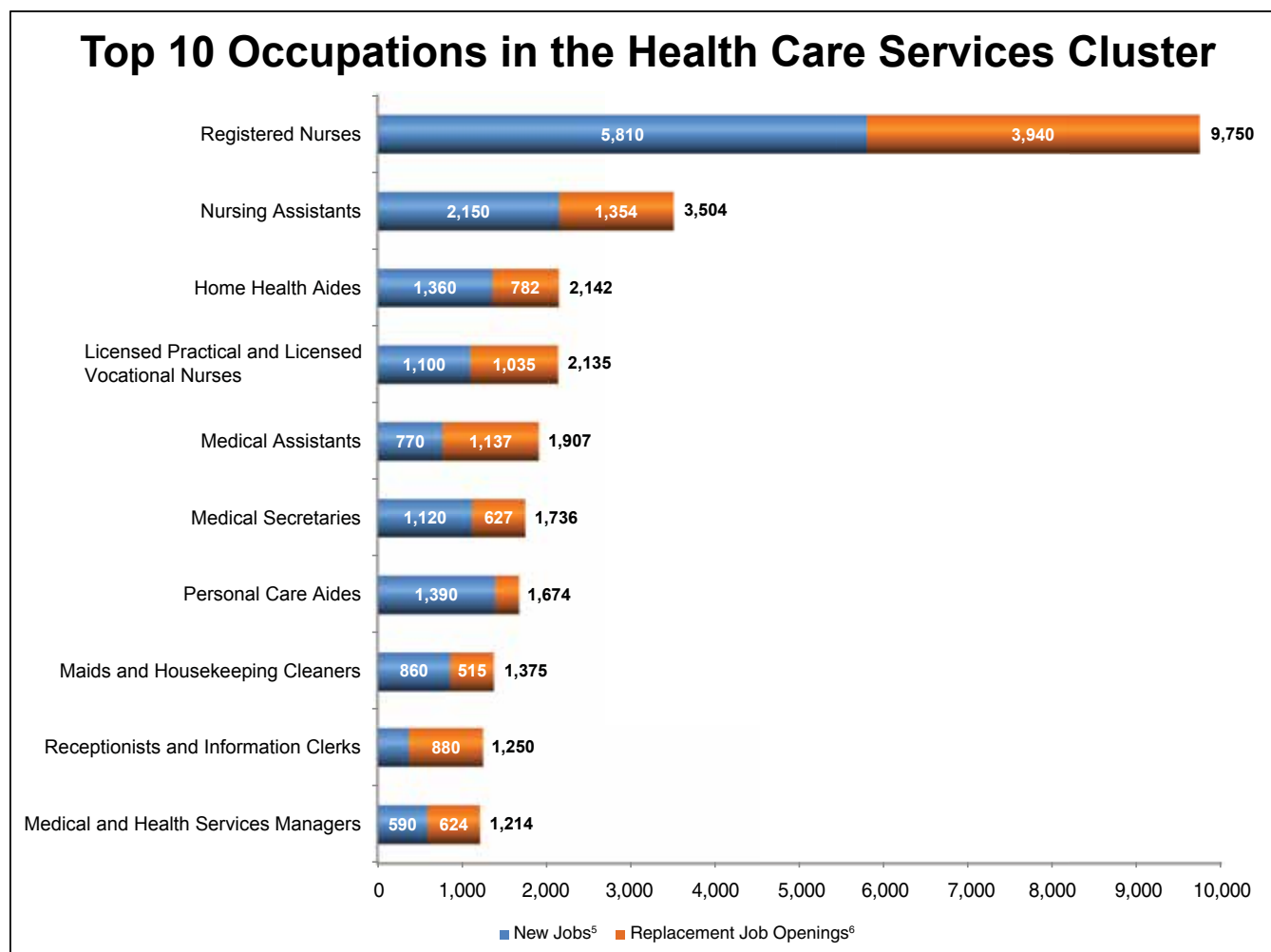
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What is the Health Care Services Cluster?

The Health Care Services cluster is comprised of 14 industries that include hospitals and doctors' offices, diagnostic laboratories, continuing care retirement communities, home health care services, and other activities related to health care. 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 Health Care Services Cluster

The graph below identifies the top 10 occupations in the Health Care Services cluster, based on the San Francisco Bay Area Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent nearly half of the 55,043 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, 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 Health Care Services Cluster

The table below further profiles the San Francisco Bay Area Economic Sub-Market's** top 10 occupations in the Health Care Services 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)
Registered Nurses	9,750	\$63.02	\$131,094	Associate's degree	6,108
Nursing Assistants	3,488	\$16.74	\$34,822	Postsecondary non-degree award	204
Home Health Aides	2,142	\$14.14	\$29,408	Less than high school	377
Licensed Practical and Licensed Vocational Nurses	2,120	\$29.78	\$61,937	Postsecondary non-degree award	544
Medical Assistants	1,907	\$19.85	\$41,279	Postsecondary non-degree award	603
Medical Secretaries	1,736	\$21.29	\$44,282	High school diploma or equivalent	1,147
Personal Care Aides	1,674	\$10.27	\$21,378	Less than high school	1,213
Maids and Housekeeping Cleaners	1,375	\$13.00	\$27,040	Less than high school	850
Receptionists and Information Clerks	1,250	\$16.86	\$35,070	High school diploma or equivalent	766
Medical and Health Services Managers	1,212	\$61.43	\$127,778	Bachelor's degree	1,102

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 10, 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 Health Care Services 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 Health Care Services 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				
Medical and Health Services Managers	1,212	\$61.43	\$127,778	1,102
Physical Therapists	672	\$48.52	\$100,935	590
Pharmacists	561	\$67.20	\$139,760	205
Healthcare Social Workers	434	\$34.16	\$71,042	130
Medical Scientists, Except Epidemiologists	399	\$49.56	\$103,099	618
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Registered Nurses	9,750	\$63.02	\$131,094	6,108
Nursing Assistants	3,488	\$16.74	\$34,822	204
Licensed Practical and Licensed Vocational Nurses	2,120	\$29.78	\$61,937	544
Medical Assistants	1,907	\$19.85	\$41,279	603
Dental Assistants	1,212	\$19.52	\$40,601	854
Requires a High School Diploma or Equivalent or Less				
Home Health Aides	2,142	\$14.14	\$29,408	377
Medical Secretaries	1,736	\$21.29	\$44,282	1,147
Personal Care Aides	1,674	\$10.27	\$21,378	1,213
Maids and Housekeeping Cleaners	1,375	\$13.00	\$27,040	850
Receptionists and Information Clerks	1,250	\$16.86	\$35,070	766

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 10, 2015.

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

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Skill Requirements in the Health Care Services Cluster

The table below lists the 10 top skills required for top occupations in the Health Care Services cluster, categorized by entry-level education requirements. Active listening, critical thinking, reading comprehension, and speaking are the most commonly shared skills, followed by coordination, monitoring, and service orientation. 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	Instructing	Judgment and Decision Making	Learning Strategies	Monitoring	Operations Analysis	Reading Comprehension	Science	Service Orientation	Social Perceptiveness
Requires a Bachelor's Degree or Higher														
Medical and Health Services Managers		●		●	●		●		●	●	●		●	●
Physical Therapists		●		●	●		●		●		●		●	●
Pharmacists	●	●			●	●			●		●	●	●	●
Healthcare Social Workers	●	●		●	●		●				●		●	●
Medical Scientists, Except Epidemiologists	●	●	●		●	●	●				●	●		●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree														
Registered Nurses	●	●		●	●			●	●		●		●	●
Nursing Assistants	●	●		●	●				●		●		●	●
Licensed Practical and Licensed Vocational Nurses		●		●	●				●		●		●	●
Medical Assistants	●	●		●	●				●		●		●	●
Dental Assistants	●	●			●	●			●		●		●	●
Requires a High School Diploma or Equivalent or Less														
Home Health Aides	●	●		●	●			●	●		●		●	●
Medical Secretaries		●		●	●				●		●		●	●
Personal Care Aides	●	●		●	●				●		●		●	●
Maids and Housekeeping Cleaners		●		●	●	●			●		●		●	●
Receptionists and Information Clerks		●	●	●	●						●		●	●

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

Work Activities in the Health Care Services Cluster

The table below lists the 10 top work activities required for top occupations in the Health Care Services cluster, categorized by entry-level education requirements. The most common include establishing and maintaining interpersonal relationships; identifying objects, actions, and events; organizing, planning, and prioritizing work; and assisting and caring for others.

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	Coordinating the Work and Activities of Others	Documenting/Recording Information	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	Organizing, Planning, and Prioritizing Work	Performing Administrative Activities	Performing for or Working Directly with the Public
Requires a Bachelor's Degree or Higher																				
Medical and Health Services Managers			●		●	●		●			●				●		●	●		
Physical Therapists		●					●	●				●	●		●	●			●	
Pharmacists	●	●						●	●				●			●		●		
Healthcare Social Workers		●		●		●	●	●							●		●	●		●
Medical Scientists, Except Epidemiologists	●			●			●	●	●			●			●	●	●		●	●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Registered Nurses		●		●			●	●				●			●	●	●		●	
Nursing Assistants		●		●			●	●				●	●		●	●	●		●	
Licensed Practical and Licensed Vocational Nurses		●		●		●	●	●				●	●		●	●	●			●
Medical Assistants		●		●		●	●	●				●			●		●	●		●
Dental Assistants		●					●	●	●			●	●		●	●	●			●
Requires a High School Diploma or Equivalent or Less																				
Home Health Aides		●		●		●	●					●	●		●		●			●
Medical Secretaries		●	●	●		●	●	●					●		●		●			●
Personal Care Aides		●		●		●	●					●	●		●	●	●			
Maids and Housekeeping Cleaners				●		●	●	●			●	●	●				●	●		●
Receptionists and Information Clerks		●				●	●	●				●			●		●	●		●

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

Related Occupations for the Health Care Services Cluster

The table below lists top occupations in the Health Care Services 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 Health Care Services cluster.

Health Care Services Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
Medical and Health Services Managers	<ul style="list-style-type: none"> • Human Resources Managers • Instructional Coordinators • Management Analysts
Physical Therapists	<ul style="list-style-type: none"> • Health Specialties Teachers, Postsecondary • Nursing Instructors and Teachers, Postsecondary • Occupational Therapists
Pharmacists	<ul style="list-style-type: none"> • Health Specialties Teachers, Postsecondary • Medical Scientists, Except Epidemiologists • Nursing Instructors and Teachers, Postsecondary
Healthcare Social Workers	<ul style="list-style-type: none"> • Child, Family, and School Social Workers • Marriage and Family Therapists • Mental Health Counselors
Medical Scientists, Except Epidemiologists	<ul style="list-style-type: none"> • Geneticists • Health Specialties Teachers, Postsecondary • Preventive Medicine Physicians
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Registered Nurses	<ul style="list-style-type: none"> • Acute Care Nurses • Critical Care Nurses • Licensed Practical and Licensed Vocational Nurses
Nursing Assistants	<ul style="list-style-type: none"> • N/A
Licensed Practical and Licensed Vocational Nurses	<ul style="list-style-type: none"> • Occupational Therapy Assistants • Physical Therapist Assistants • Radiologic Technicians
Medical Assistants	<ul style="list-style-type: none"> • Pharmacy Technicians • Social and Human Service Assistants • Speech-Language Pathology Assistants
Dental Assistants	<ul style="list-style-type: none"> • Dental Hygienists • Endoscopy Technicians • Surgical Technologists
Requires a High School Diploma or Equivalent or Less	
Home Health Aides	<ul style="list-style-type: none"> • Childcare Workers • Personal Care Aides • Physical Therapist Aides
Medical Secretaries	<ul style="list-style-type: none"> • Bill and Account Collectors • Medical Records and Health Information Technicians • Receptionists and Information Clerks
Personal Care Aides	<ul style="list-style-type: none"> • Ambulance Drivers and Attendants, Except Emergency Medical Technicians • Childcare Workers • Occupational Therapy Aides
Maids and Housekeeping Cleaners	<ul style="list-style-type: none"> • Dishwashers • Food Preparation Workers • Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Receptionists and Information Clerks	<ul style="list-style-type: none"> • Customer Service Representatives • Hotel, Motel, and Resort Desk Clerks • Office Clerks, General

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

Employer Demand for the Health Care Services Cluster

The following table lists the San Francisco Bay Area Economic Sub-Market** employers in the Health Care Services cluster who posted the most job advertisements during the 120-day period ending March 10, 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.

Health Care Services Cluster Employers	Recent Job Advertisements ¹¹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Sutter Health	461	374	87	23.3%
NorthBay Healthcare	303	207	96	46.4%
Onward Healthcare	127	70	57	81.4%
American Mobile Healthcare	123	147	-24	-16.3%
Brookdale Senior Living	112	13	99	761.5%
Children's Hospital & Research Center Oakland	93	86	7	8.1%
Fresenius Medical Care	85	64	21	32.8%
John Muir Health	83	31	52	167.7%
Vitas Healthcare	71	15	56	373.3%
Kindred Healthcare	64	49	15	30.6%
DaVita, Inc.	50	68	-18	-26.5%
Tenet Healthcare Corporation	45	26	19	73.1%
Aureus Medical	45	0	45	—
Allied Health Group	44	16	28	175.0%
La Clinica	43	24	19	79.2%
Ascent Technology	41	0	41	—
Genesis HealthCare	41	18	23	127.8%
Western Dental	39	19	20	105.3%
Va Medical Center	39	0	39	—
Sunrise Senior Living, Inc.	37	18	19	105.6%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 10, 2015.

¹¹ Totals do not include employers with anonymous job advertisements.

^{**} This economic sub-market includes Alameda, Contra Costa, and Solano Counties.

Instructional Programs for the Top Health Care Services Cluster Occupations

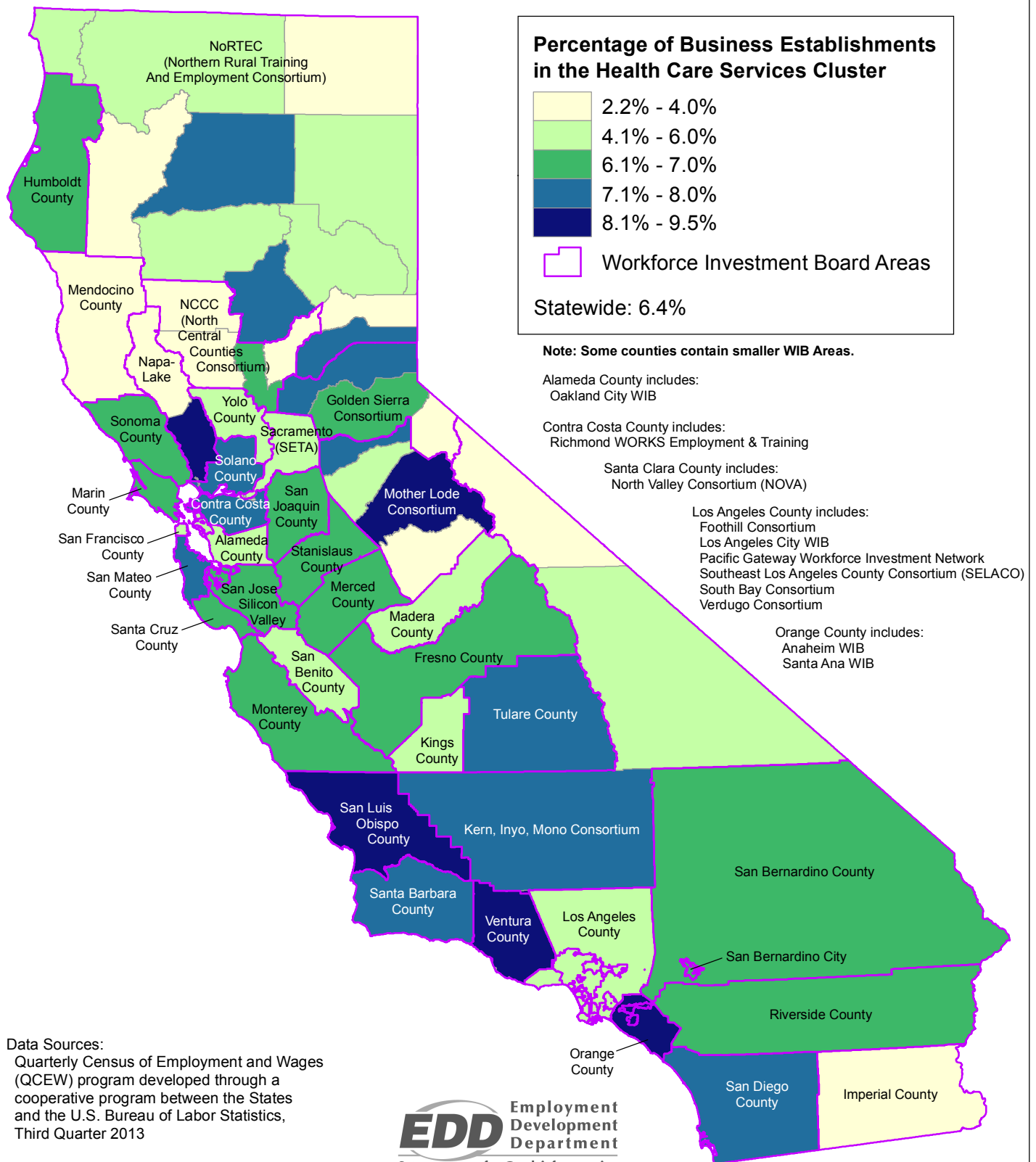
The table below provides examples of instructional programs related to some of the top occupations in the Health Care Services cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Health Care Services 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
Registered Nurses	51.3803	Adult Health Nurse/Nursing	123000	Nursing
	51.3805	Family Practice Nurse/Nursing	123010	Registered Nursing
	51.3806	Maternal/Child Health and Neonatal Nurse/Nursing		
Nursing Assistants	51.2601	Health Aide	123030	Certified Nurse Assistant
	51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide		
	51.3999	Practical Nursing, Vocational Nursing and Nursing Assistants, Other		
Licensed Practical and Licensed Vocational Nurses	51.3901	Licensed Practical/Vocational Nurse Training	123020	Licensed Vocational Nursing
	51.3999	Practical Nursing, Vocational Nursing and Nursing Assistants, Other		
Medical Assistants	51.0710	Medical Office Assistant/Specialist	120800	Medical Assisting
	51.0712	Medical Reception/Receptionist	120810	Clinical Medical Assisting
	51.0713	Medical Insurance Coding Specialist/Coder	120820	Administrative Medical Assisting
Dental Assistants	51.0601	Dental Assisting/Assistant	124010	Dental Assistant
Home Health Aides	51.2602	Home Health Aide/Home Attendant	123080	Home Health Aide
Medical Secretaries	51.0710	Medical Office Assistant/Specialist	051420	Medical Office Technology
	51.0714	Medical Insurance Specialist/Medical Biller		
	51.0716	Medical Administrative/Executive Assistant and Medical Secretary		
Personal Care Aides	51.2602	Home Health Aide/Home Attendant	123080	Home Health Aide
Receptionists and Information Clerks	52.0406	Receptionist	N/A	N/A

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

California Health Care Services 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

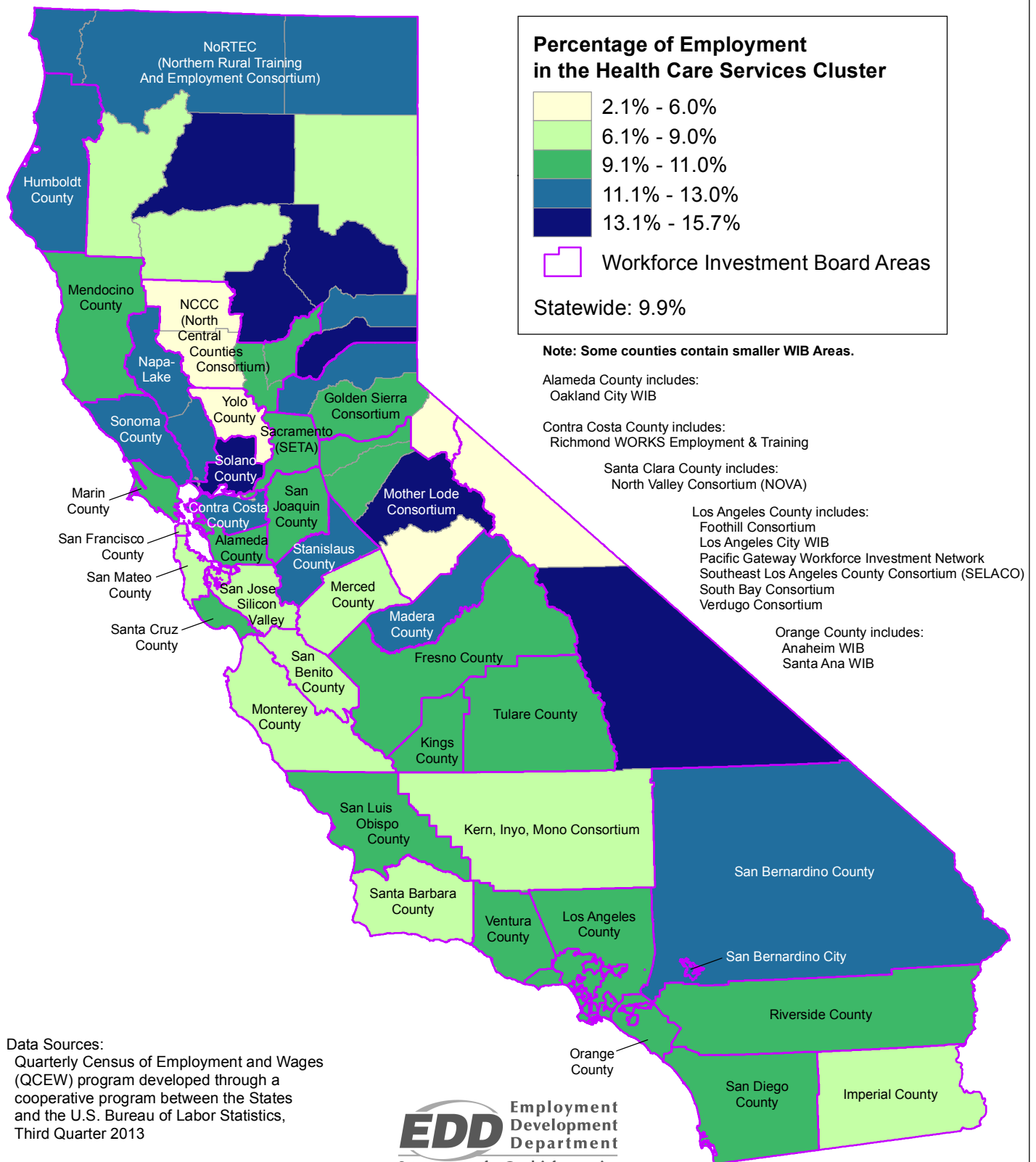
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California Health Care Services Cluster

Percentage of Total County Employment, 2013



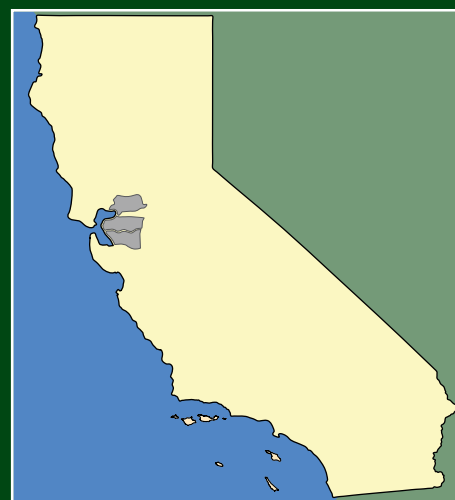
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Occupational Analysis: Hospitality and Tourism Cluster

San Francisco Bay Area Economic Sub-Market
Alameda, Contra Costa, and Solano Counties

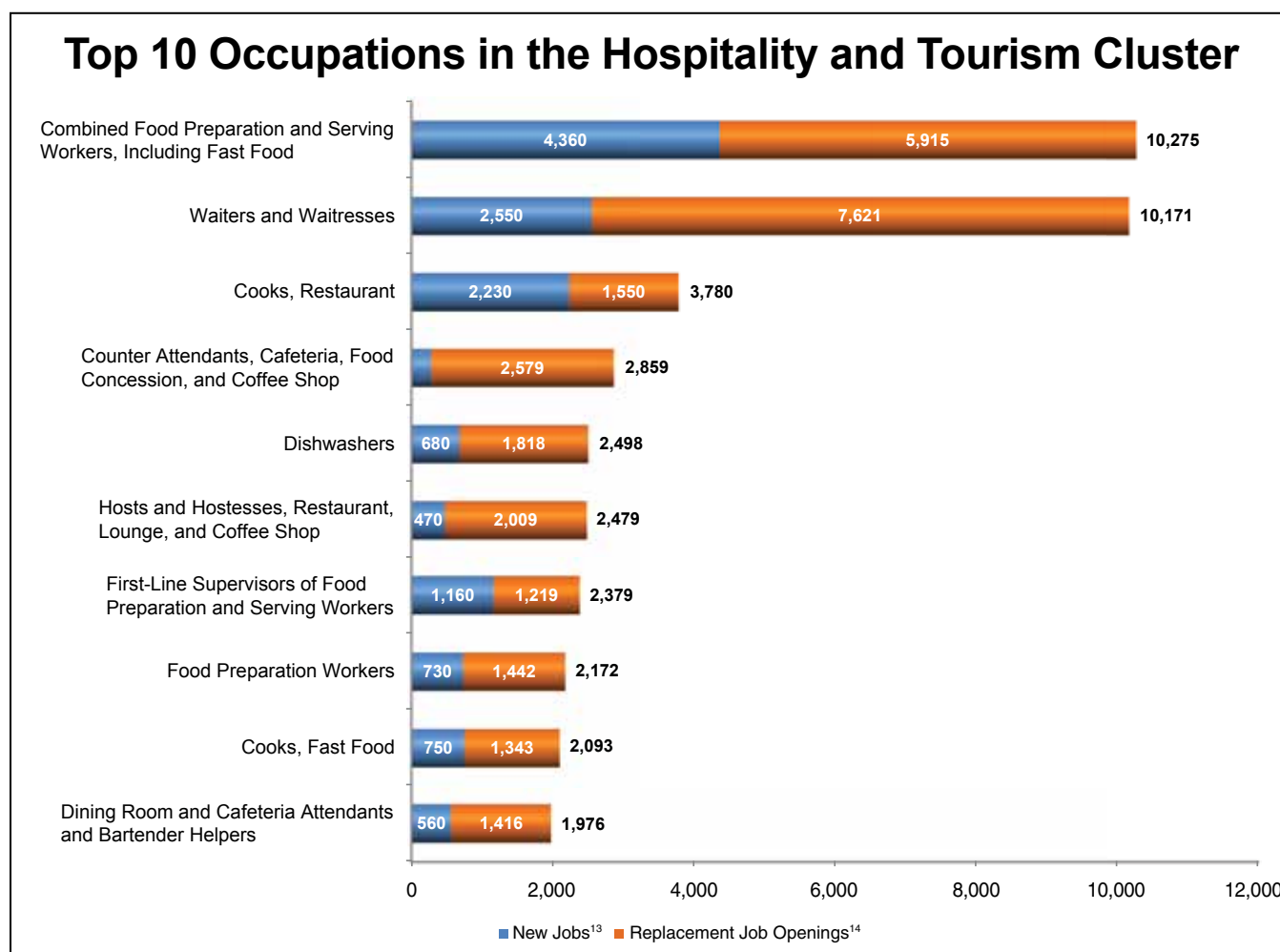
March 2015

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 represents approximately three-quarters of the 54,003 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, and speaking.¹²



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.

¹² U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹³ 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.

¹⁴ 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 Alameda, Contra Costa, and Solano Counties.

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 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBS™ (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ¹⁵ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ¹⁶	HWOL Job Ads ¹⁷ (120 days)
Combined Food Preparation and Serving Workers, Including Fast Food	10,275	\$9.36	\$19,474	Less than high school	1,330
Waiters and Waitresses	10,171	\$9.28	\$19,292	Less than high school	700
Cooks, Restaurant	3,780	\$10.74	\$22,337	Less than high school	732
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	2,859	\$9.75	\$20,281	Less than high school	178
Dishwashers	2,498	\$9.29	\$19,323	Less than high school	382
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	2,479	\$9.21	\$19,151	Less than high school	127
First-Line Supervisors of Food Preparation and Serving Workers	2,379	\$13.39	\$27,851	High school diploma or equivalent	1,922
Food Preparation Workers	2,172	\$9.46	\$19,692	Less than high school	399
Cooks, Fast Food	2,093	\$9.46	\$19,678	Less than high school	113
Dining Room and Cafeteria Attendants and Bartender Helpers	1,976	\$9.16	\$19,050	Less than high school	187

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 10, 2015.

¹⁵ Total job openings are the sum of new jobs and replacement job openings.

¹⁶ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

¹⁷ 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 Alameda, Contra Costa, and Solano Counties.

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 ¹⁸ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
Coaches and Scouts	258	N/A	\$41,377	295
General and Operations Managers	228	\$55.08	\$114,569	850
Recreation Workers	93	\$12.39	\$25,771	187
Market Research Analysts and Marketing Specialists	72	\$37.98	\$79,009	717
Meeting, Convention, and Event Planners	56	\$22.93	\$47,678	102
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Massage Therapists	17	\$23.32	\$48,501	180
Actors	13	\$17.47	N/A	100
Teacher Assistants	12	N/A	\$30,997	945
Audio and Video Equipment Technicians	10	\$26.64	\$55,397	76
Skincare Specialists	2	\$17.49	\$36,383	85
Requires a High School Diploma or Equivalent or Less				
Combined Food Preparation and Serving Workers, Including Fast Food	10,275	\$9.36	\$19,474	1,330
Waiters and Waitresses	10,171	\$9.28	\$19,292	700
Cooks, Restaurant	3,780	\$10.74	\$22,337	732
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	2,859	\$9.75	\$20,281	178
Dishwashers	2,498	\$9.29	\$19,323	382

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 10, 2015.

¹⁸ Total job openings are the sum of new jobs and replacement job openings.

** This economic sub-market includes Alameda, Contra Costa, and Solano Counties.

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 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	Coordination	Critical Thinking	Equipment Maintenance	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Monitoring	Negotiation	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Service Orientation	Social Perceptiveness
Requires a Bachelor's Degree or Higher																	
Coaches and Scouts		●		●		●	●	●	●	●						●	●
General and Operations Managers	●	●	●	●					●	●				●		●	●
Recreation Workers		●	●	●		●			●	●				●	●	●	●
Market Research Analysts and Marketing Specialists	●	●		●			●		●					●		●	●
Meeting, Convention, and Event Planners		●	●	●					●	●				●	●	●	●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																	
Massage Therapists	●	●		●		●			●					●	●	●	●
Actors	●	●	●	●					●			●		●		●	●
Teacher Assistants		●	●	●		●	●		●					●		●	●
Audio and Video Equipment Technicians	●	●	●	●		●			●		●			●		●	●
Skincare Specialists	●	●	●	●		●			●					●	●	●	●
Requires a High School Diploma or Equivalent or Less																	
Combined Food Preparation and Serving Workers, Including Fast Food		●	●	●		●	●					●		●	●	●	●
Waiters and Waitresses		●	●	●			●		●			●		●	●	●	●
Cooks, Restaurant	●	●	●	●		●			●				●			●	●
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop		●	●	●					●			●		●	●	●	●
Dishwashers	●	●	●	●	●				●			●		●		●	●

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

Work Activities in the Hospitality and Tourism Cluster

The table below lists the 10 top work activities required for top occupations in the Hospitality and Tourism cluster, categorized by entry-level education requirements. The most common include establishing and maintaining interpersonal relationships; communicating with supervisors, peers, or subordinates; organizing, planning, and prioritizing work; and identifying objects, actions, and events.

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	Getting Information	Handling and Moving Objects	Identifying Objects, Actions, and Events	Interacting With Computers	Interpreting the Meaning of Information for Others	Judging the Qualities of Things, Services, or People	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Organizing, Planning, and Prioritizing Work	Performing for or Working Directly with the Public	Performing General Physical Activities
Requires a Bachelor's Degree or Higher																				
Coaches and Scouts			●				●	●		●				●			●	●		●
General and Operations Managers				●	●		●	●						●		●	●		●	●
Recreation Workers		●	●		●		●	●									●	●	●	
Market Research Analysts and Marketing Specialists	●			●	●			●	●	●					●				●	
Meeting, Convention, and Event Planners				●	●			●	●	●	●						●	●		●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Massage Therapists		●		●				●	●	●				●			●	●	●	●
Actors				●	●			●				●	●	●			●	●	●	●
Teacher Assistants		●	●		●			●	●						●	●			●	●
Audio and Video Equipment Technicians				●	●		●			●	●			●	●				●	●
Skincare Specialists	●						●	●		●					●	●	●			●
Requires a High School Diploma or Equivalent or Less																				
Combined Food Preparation and Serving Workers, Including Fast Food			●		●		●	●	●	●	●							●		●
Waiters and Waitresses				●			●	●	●	●	●						●	●	●	●
Cooks, Restaurant				●			●	●		●	●				●	●	●	●		●
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop				●			●	●	●	●					●		●		●	●
Dishwashers		●		●	●		●		●						●	●	●			●

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

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	
Coaches and Scouts	<ul style="list-style-type: none"> Recreational Therapists Secondary School Teachers, Except Special and Career/Technical Education Training and Development Managers
General and Operations Managers	<ul style="list-style-type: none"> Logistics Managers Purchasing Managers Storage and Distribution Managers
Recreation Workers	<ul style="list-style-type: none"> Recreational Therapists Secondary School Teachers, Except Special and Career/Technical Social and Human Service Assistants
Market Research Analysts and Marketing Specialists	<ul style="list-style-type: none"> Financial Analysts Management Analysts Risk Management Specialists
Meeting, Convention, and Event Planners	<ul style="list-style-type: none"> Advertising and Promotion Managers Human Resources Specialists Public Relations and Fundraising Managers
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Massage Therapists	<ul style="list-style-type: none"> Hairdressers, Hairstylists, and Cosmetologists Manicurists and Pedicurists Skincare Specialists
Actors	<ul style="list-style-type: none"> Costume Attendants Radio and Television Announcers Singers
Teacher Assistants	<ul style="list-style-type: none"> Childcare Workers Preschool Teachers, Except Special Education Social and Human Service Assistants
Audio and Video Equipment Technicians	<ul style="list-style-type: none"> Computer User Support Specialists Film and Video Editors Sound Engineering Technicians
Skincare Specialists	<ul style="list-style-type: none"> Dental Assistants Massage Therapists Medical Assistants
Requires a High School Diploma or Equivalent or Less	
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> Cooks, Fast Food Food Preparation Workers Food Servers, Nonrestaurant
Waiters and Waitresses	<ul style="list-style-type: none"> Counter Attendants, Cafeteria, Food Concession, and Coffee Shop Dining Room and Cafeteria Attendants and Bartender Helpers Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Cooks, Restaurant	<ul style="list-style-type: none"> Cooks, Fast Food Cooks, Institution and Cafeteria Food Preparation Workers
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	<ul style="list-style-type: none"> Cashiers Combined Food Preparation and Serving Workers, Including Fast Food Waiters and Waitresses
Dishwashers	<ul style="list-style-type: none"> Helpers -Production Workers Janitors and Cleaners, Except Maids and Housekeeping Cleaners Stock Clerks -Stockroom, Warehouse, or Storage Yard

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 10, 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 ¹⁹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Taco Bell	186	15	171	1,140.0%
Chipotle	164	70	94	134.3%
24 Hour Fitness	90	238	-148	-62.2%
Red Robin	77	16	61	381.3%
California State Automobile Association	61	17	44	258.8%
Marriott	60	131	-71	-54.2%
Interstate Hotels & Resorts	57	7	50	714.3%
Boston Market Corporation	39	5	34	680.0%
Jamba Juice Company	39	50	-11	-22.0%
G6 Hospitality LLC	35	0	35	—
Vail Resorts	32	26	6	23.1%
Hilton Hotels & Resorts	28	15	13	86.7%
Sodexo, Inc.	24	40	-16	-40.0%
Hyatt	22	17	5	29.4%
Starbucks	22	157	-135	-86.0%
Guckenheimer	20	11	9	81.8%
American Bread Co Panera Bread	20	0	20	—
P.F. Chang's China Bistro	18	5	13	260.0%
Revolution Foods	18	4	14	350.0%
Hersha Hospitality	16	12	4	33.3%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 10, 2015.

¹⁹ Totals do not include employers with anonymous job advertisements.

** This economic sub-market includes Alameda, Contra Costa, and Solano Counties.

Instructional Programs for the Top Hospitality and Tourism Cluster Occupations

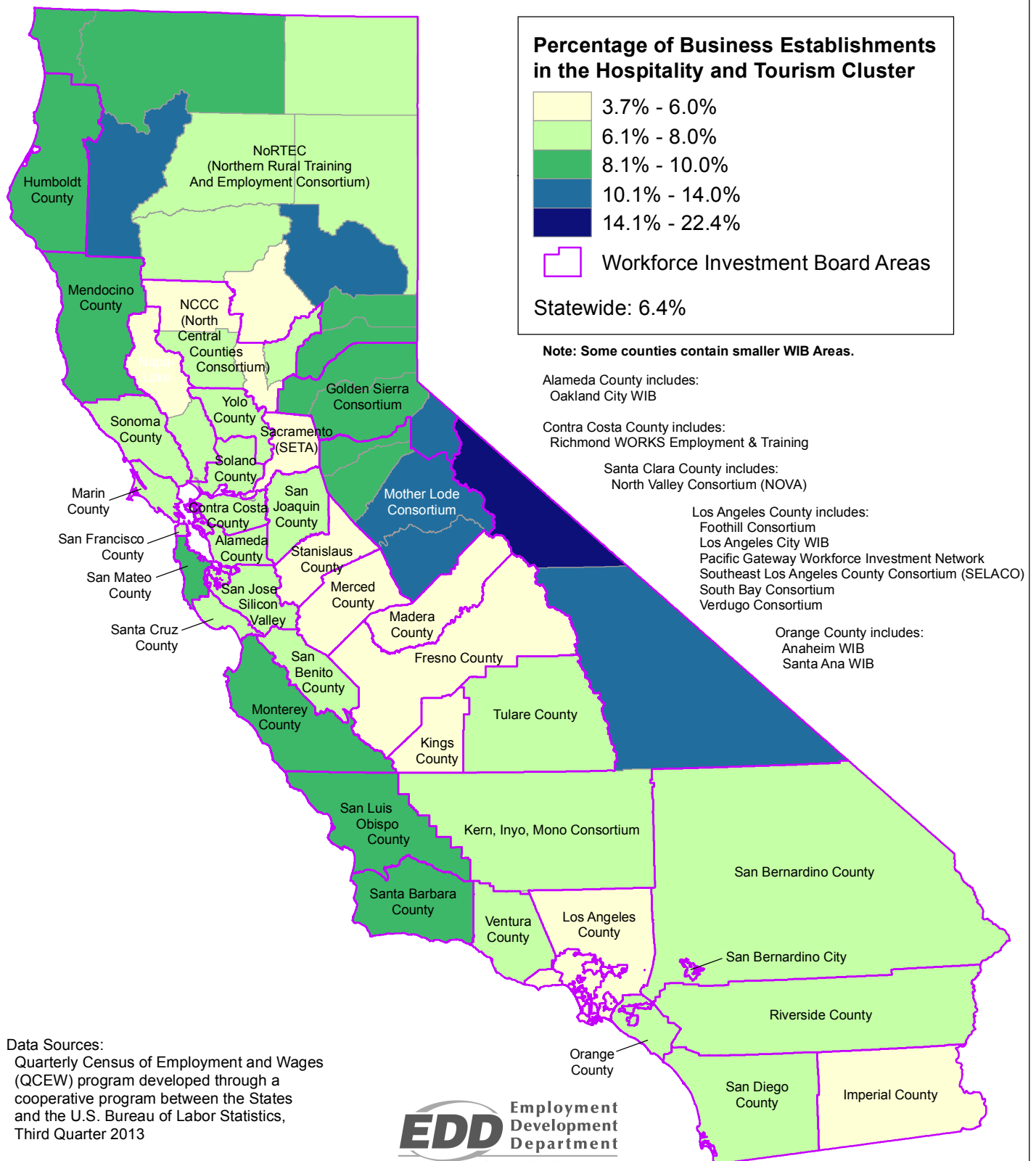
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Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Massage Therapists	51.3501	Massage Therapy/Therapeutic Massage	126200	Massage Therapy
	51.3502	Asian Bodywork Therapy		
	51.3503	Somatic Bodywork		
Actors	50.0501	Drama and Dramatics/Theatre Arts, General	100700	Dramatic Arts
	50.0506	Acting		
	50.0507	Directing and Theatrical Production		
Teacher Assistants	13.1501	Teacher Assistant/Aide	080200	Educational Aide (Teacher Assistant)
			080210	Educational Aide (Teacher Assistant), Bilingual
Audio and Video Equipment Technicians	01.0802	Agricultural Communication/Journalism	100500	Commercial Music
	10.0201	Photographic and Film/Video Technology/Technician and Assistant	101200	Applied Photography
	10.0203	Recording Arts Technology/Technician		
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		
Cooks, Restaurant	12.0500	Cooking and Related Culinary Arts, General	130630	Culinary Arts
	12.0503	Culinary Arts/Chef Training		

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](https://nces.ed.gov/ipeds/) at [www.nces.ed.gov](https://nces.ed.gov/); [California Community Colleges TOP-to-CIP Crosswalk](https://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
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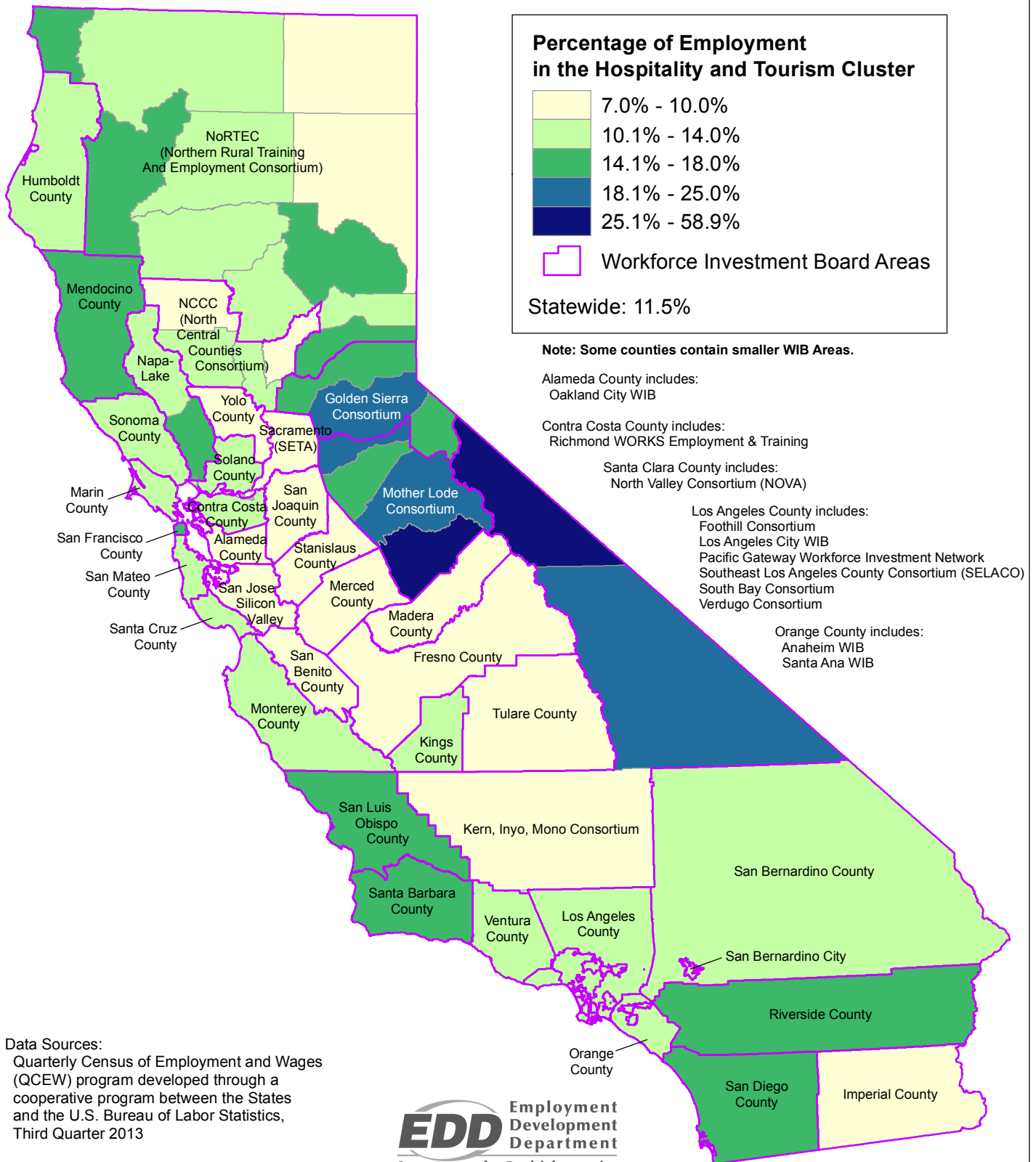
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California Hospitality and Tourism Cluster

Percentage of Total County Employment, 2013



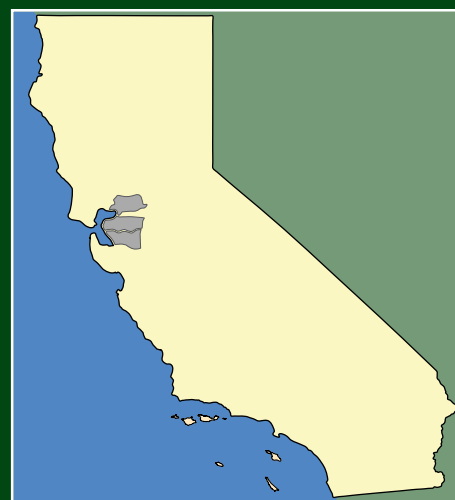
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July 2014

EDD Employment Development Department
State of California

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File T036



Occupational Analysis: Retail Cluster

San Francisco Bay Area Economic Sub-Market
Alameda, Contra Costa, and Solano Counties

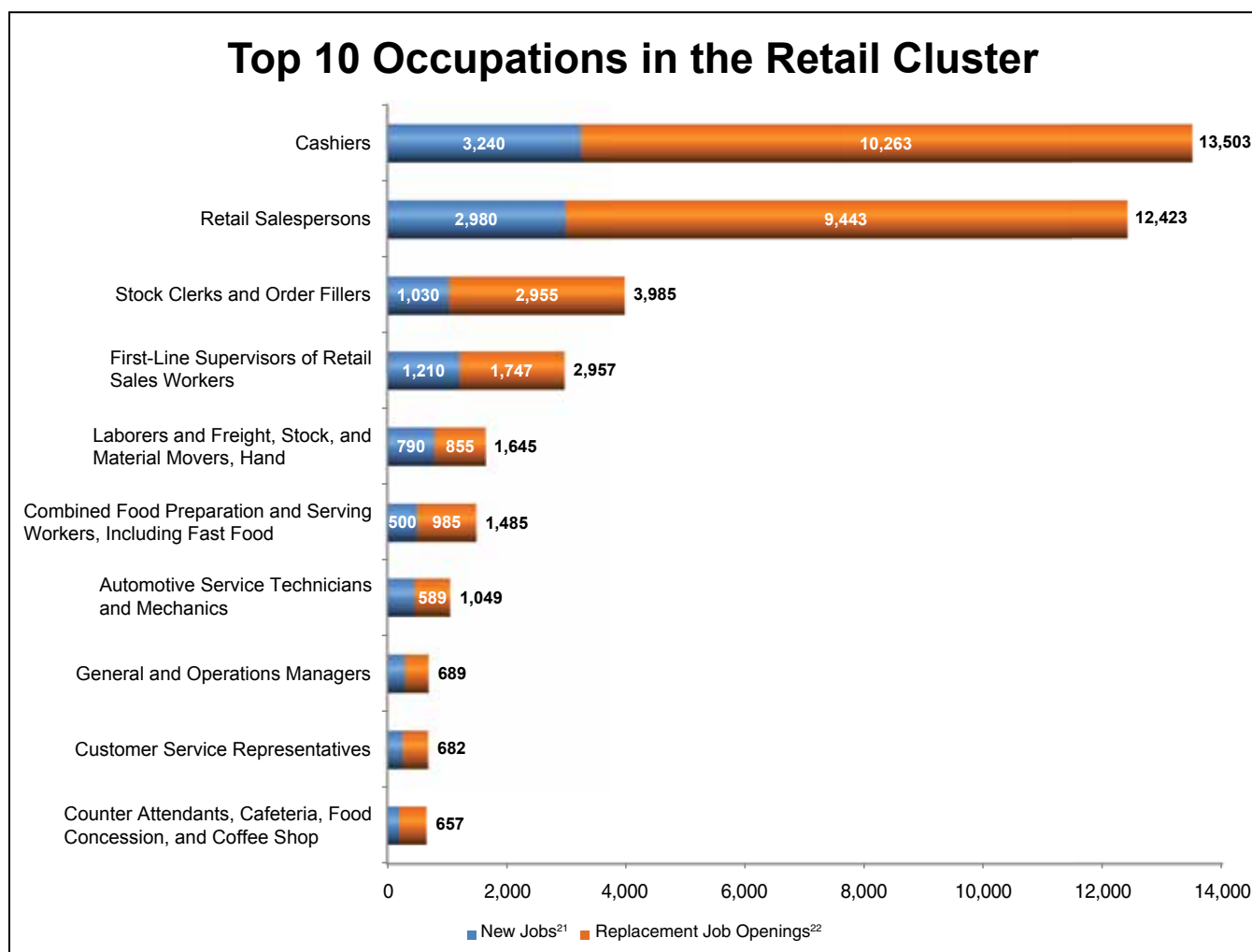
March 2015

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 represents approximately three-quarters of the 49,840 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, critical thinking, reading comprehension, and speaking.²⁰



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.

²⁰ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

²¹ 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.

²² 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 Alameda, Contra Costa, and Solano Counties.

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 ²³ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ²⁴	HWOL Job Ads ²⁵ (120 days)
Cashiers	13,503	\$11.21	\$23,328	Less than high school	839
Retail Salespersons	12,423	\$11.39	\$23,683	Less than high school	4,078
Stock Clerks and Order Fillers	3,985	\$12.49	\$25,972	Less than high school	1,192
First-Line Supervisors of Retail Sales Workers	2,957	\$21.07	\$43,821	High school diploma or equivalent	3,013
Laborers and Freight, Stock, and Material Movers, Hand	1,645	\$13.65	\$28,386	Less than high school	801
Combined Food Preparation and Serving Workers, Including Fast Food	1,485	\$9.36	\$19,474	Less than high school	1,330
Automotive Service Technicians and Mechanics	1,049	\$23.06	\$47,965	High school diploma or equivalent	946
General and Operations Managers	689	\$55.08	\$114,569	Bachelor's degree	850
Customer Service Representatives	682	\$19.59	\$40,757	High school diploma or equivalent	2,437
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	657	\$9.75	\$20,281	Less than high school	178

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 10, 2015.

²³ Total job openings are the sum of new jobs and replacement job openings.

²⁴ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

²⁵ 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 Alameda, Contra Costa, and Solano Counties.

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 ²⁶ (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	689	\$55.08	\$114,569	850
Pharmacists	389	\$67.20	\$139,760	205
Sales Managers	332	\$60.33	\$125,492	761
Loan Officers	79	\$34.81	\$72,419	574
Market Research Analysts and Marketing Specialists	76	\$37.98	\$79,009	717
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Computer, Automated Teller, and Office Machine Repairers	60	\$17.72	\$36,848	8
Heavy and Tractor-Trailer Truck Drivers	54	\$21.51	\$44,744	1,685
First-Line Supervisors of Production and Operating Workers	41	\$33.42	\$69,520	1,031
Hairdressers, Hairstylists, and Cosmetologists	38	\$12.67	\$26,345	378
Computer User Support Specialists	34	\$28.82	\$59,961	1,431
Requires a High School Diploma or Equivalent or Less				
Cashiers	13,503	\$11.21	\$23,328	839
Retail Salespersons	12,423	\$11.39	\$23,683	4,078
Stock Clerks and Order Fillers	3,985	\$12.49	\$25,972	1,192
First-Line Supervisors of Retail Sales Workers	2,957	\$21.07	\$43,821	3,013
Laborers and Freight, Stock, and Material Movers, Hand	1,645	\$13.65	\$28,386	801

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 10, 2015.

²⁶ Total job openings are the sum of new jobs and replacement job openings.

** This economic sub-market includes Alameda, Contra Costa, and Solano Counties.

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 monitoring, 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	Instruction	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Persuasion	Reading Comprehension	Repairing	Science	Service Orientation
Requires a Bachelor's Degree or Higher																				
General and Operations Managers	•	•		•	•					•		•					•			•
Pharmacists	•	•			•		•					•					•	•		•
Sales Managers				•	•			•		•		•				•				•
Loan Officers	•	•	•		•			•		•							•		•	•
Market Research Analysts and Marketing Specialists	•	•			•			•				•					•		•	•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Computer, Automated Teller, and Office Machine Repairers	•	•			•							•		•	•		•	•		•
Heavy and Tractor-Trailer Truck Drivers		•	•		•	•						•		•	•		•			•
First-Line Supervisors of Production and Operating Workers		•		•	•				•			•					•		•	•
Hairdressers, Hairstylists, and Cosmetologists	•	•			•		•	•				•				•		•	•	
Computer User Support Specialists	•	•		•	•		•					•					•		•	•
Requires a High School Diploma or Equivalent or Less																				
Cashiers		•		•	•							•					•		•	•
Retail Salespersons		•			•							•	•			•	•	•		•
Stock Clerks and Order Fillers ²⁷	•	•	•	•	•							•					•		•	•
First-Line Supervisors of Retail Sales Workers					•		•		•			•	•			•	•			•
Laborers and Freight, Stock, and Material Movers, Hand		•	•	•	•							•		•	•		•			•

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

²⁷ Work activities listed represent Stock Clerks, Sales Floor, 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 relationships; organizing, planning, and prioritizing work; communicating with supervisors, peers, or subordinates; and making decisions and solving problems.

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	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 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				●	●		●	●								●	●			●
Pharmacists	●	●					●	●					●			●		●	●	
Sales Managers			●	●	●		●	●		●						●			●	
Loan Officers			●				●		●							●		●		
Market Research Analysts and Marketing Specialists	●			●	●		●		●				●			●				●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Computer, Automated Teller, and Office Machine Repairers				●			●						●	●	●			●	●	
Heavy and Tractor-Trailer Truck Drivers					●		●		●		●	●	●		●		●	●		
First-Line Supervisors of Production and Operating Workers		●		●	●	●	●			●	●							●		
Hairdressers, Hairstylists, and Cosmetologists	●		●				●		●		●							●		●
Computer User Support Specialists				●			●		●			●	●	●				●		●
Requires a High School Diploma or Equivalent or Less																				
Cashiers			●	●			●		●		●					●		●	●	
Retail Salespersons			●	●			●				●					●		●	●	●
Stock Clerks and Order Fillers ²⁸			●	●			●				●	●				●	●	●		●
First-Line Supervisors of Retail Sales Workers		●		●			●		●		●					●		●	●	
Laborers and Freight, Stock, and Material Movers, Hand				●	●		●	●			●	●				●	●	●		

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

²⁸ Skills listed represent Stock Clerks, Sales Floor, 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"> Logistics Managers Purchasing Managers Storage and Distribution Managers
Pharmacists	<ul style="list-style-type: none"> Health Specialties Teachers, Postsecondary Medical Scientists, Except Epidemiologists Nursing Instructors and Teachers, Postsecondary
Sales Managers	<ul style="list-style-type: none"> Advertising and Promoting Managers Financial Managers, Branch or Department Marketing Managers
Loan Officers	<ul style="list-style-type: none"> Custom Brokers Insurance Sales Agents Personal Financial Advisors
Market Research Analysts and Marketing Specialists	<ul style="list-style-type: none"> Financial Analysts Management Analysts Risk Management Specialists
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> Audio and Video Equipment Technicians Computer User Support Specialist Radio Mechanics
Heavy and Tractor-Trailer Truck Drivers	<ul style="list-style-type: none"> Light Truck or Delivery Services Drivers Motorboat Operators Pile-Driver Operators
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 Helpers, Laborers, and Material Movers, Hand First-Line Supervisors of Mechanics, Installers, and Repairers
Hairdressers, Hairstylists, and Cosmetologists	<ul style="list-style-type: none"> Manicurists and Pedicurists Massage Therapists Skincare Specialists
Computer User Support Specialists	<ul style="list-style-type: none"> Computer Operators Desktop Publishers Web Administrators
Requires a High School Diploma or Equivalent or Less	
Cashiers	<ul style="list-style-type: none"> Counter and Rental Clerks Stock Clerks, Sales Floor Waiters and Waitresses
Retail Salespersons	<ul style="list-style-type: none"> Bartenders Hotel, Motel, and Resort Desk Clerks Tellers
Stock Clerks and Order Fillers	<ul style="list-style-type: none"> Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop Marking Clerks Stock Clerks -Stockroom, Warehouse, or Storage Yard
First-Line Supervisors of Retail Sales Workers	<ul style="list-style-type: none"> First-Line Supervisors of Food Preparation and Serving Workers Hotel, Motel, and Resort Desk Clerks Retail Salespersons
Laborers and Freight, Stock, and Material Movers, Hand	<ul style="list-style-type: none"> Fence Erectors Industrial Truck and Tractor Operators Reinforcing Iron and Rebar Workers

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 10, 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 ²⁹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Ross Stores	5,013	39	4,974	12,753.8%
Safeway Companies	672	325	347	106.8%
Macy's	386	280	106	37.9%
Whole Foods	270	147	123	83.7%
Home Depot	262	111	151	136.0%
Lowe's	187	155	32	20.6%
Target Corporation	143	51	92	180.4%
Office Depot	105	29	76	262.1%
Sears Holdings Corporation	105	352	-247	-70.2%
Toys"R"Us	102	136	-34	-25.0%
Dollar Tree Stores, Inc.	94	42	52	123.8%
Chevron	80	246	-166	-67.5%
The Men's Wearhouse, Inc.	78	23	55	239.1%
Nordstrom	75	74	1	1.4%
Tesla Motors	66	104	-38	-36.5%
T-Mobile	59	136	-77	-56.6%
Dick's Sporting Goods, Inc.	59	52	7	13.5%
Rite Aid	49	29	20	69.0%
Sprint Corporation	46	67	-21	-31.3%
Gap, Inc.	43	51	-8	-15.7%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending March 10, 2015.

²⁹ Totals do not include employers with anonymous job advertisements.

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Instructional Programs for the Retail Cluster Occupations

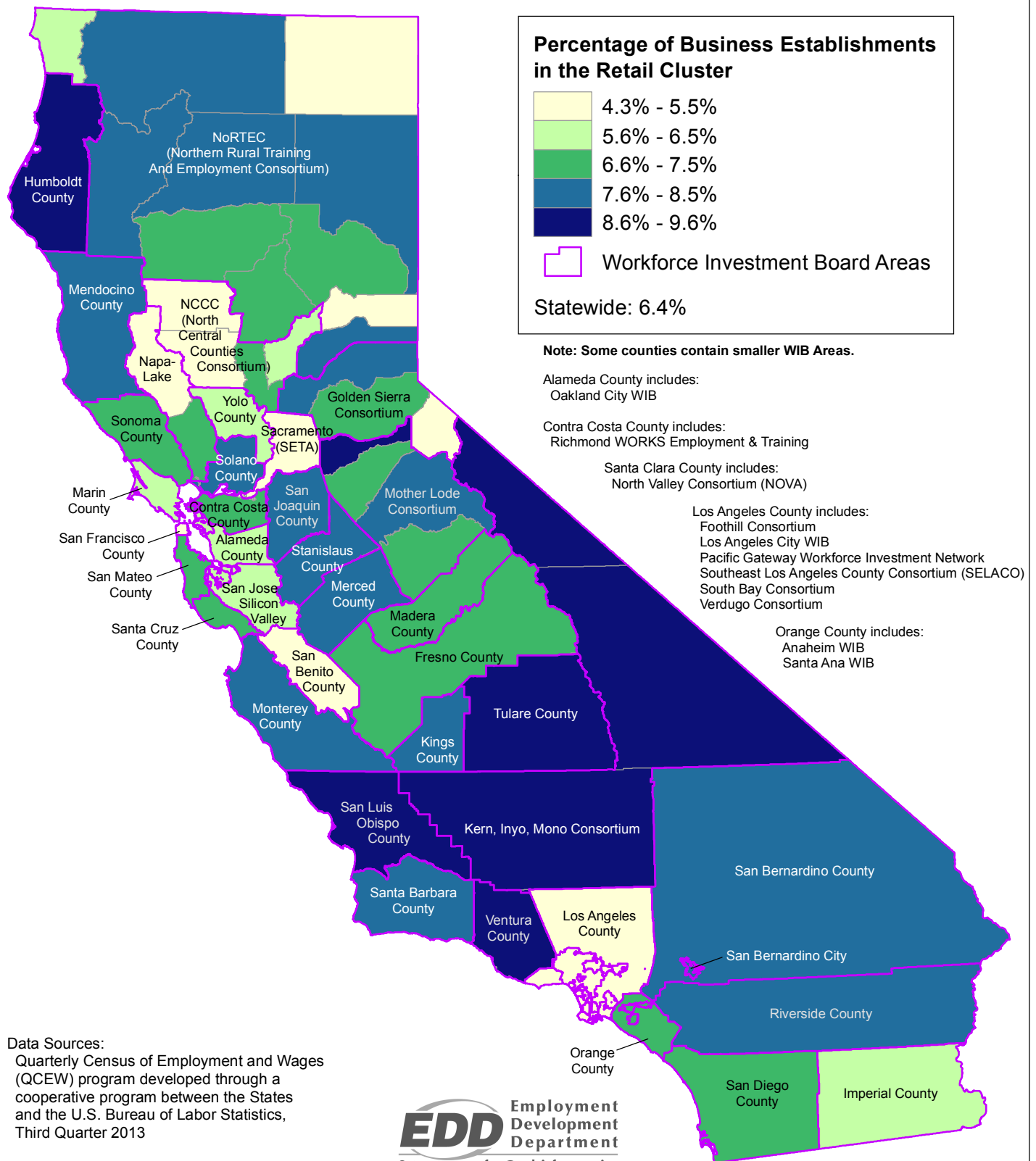
The table below provides examples of instructional programs related to some of the top occupations in the Retail cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Retail cluster. 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
Computer, Automated Teller, and Office Machine Repairers	47.0102	Business Machine Repair	093410	Computer Electronics
	47.0104	Computer Installation and Repair Technology/Technician		
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
Hairdressers, Hairstylists, and Cosmetologists	12.0401	Cosmetology/Cosmetologist, General	300700	Cosmetology and Barbering
	12.0406	Make-Up Artist/Specialist		
	12.0407	Hair Styling/Stylist and Hair Design		
Computer User Support Specialists	01.0106	Agricultural Business Technology	070820	Computer Support
	11.1006	Computer Support Specialist		
	51.0709	Medical Office Computer Specialist/Assistant		
First-Line Supervisors of Retail Sales Workers	52.0212	Retail Management	050650	Retail Store Operations and Management
	52.1803	Retailing and Retail Operations	050940	Sales and Salesmanship
	52.1804	Selling Skills and Sales Operations	050960	Display

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](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

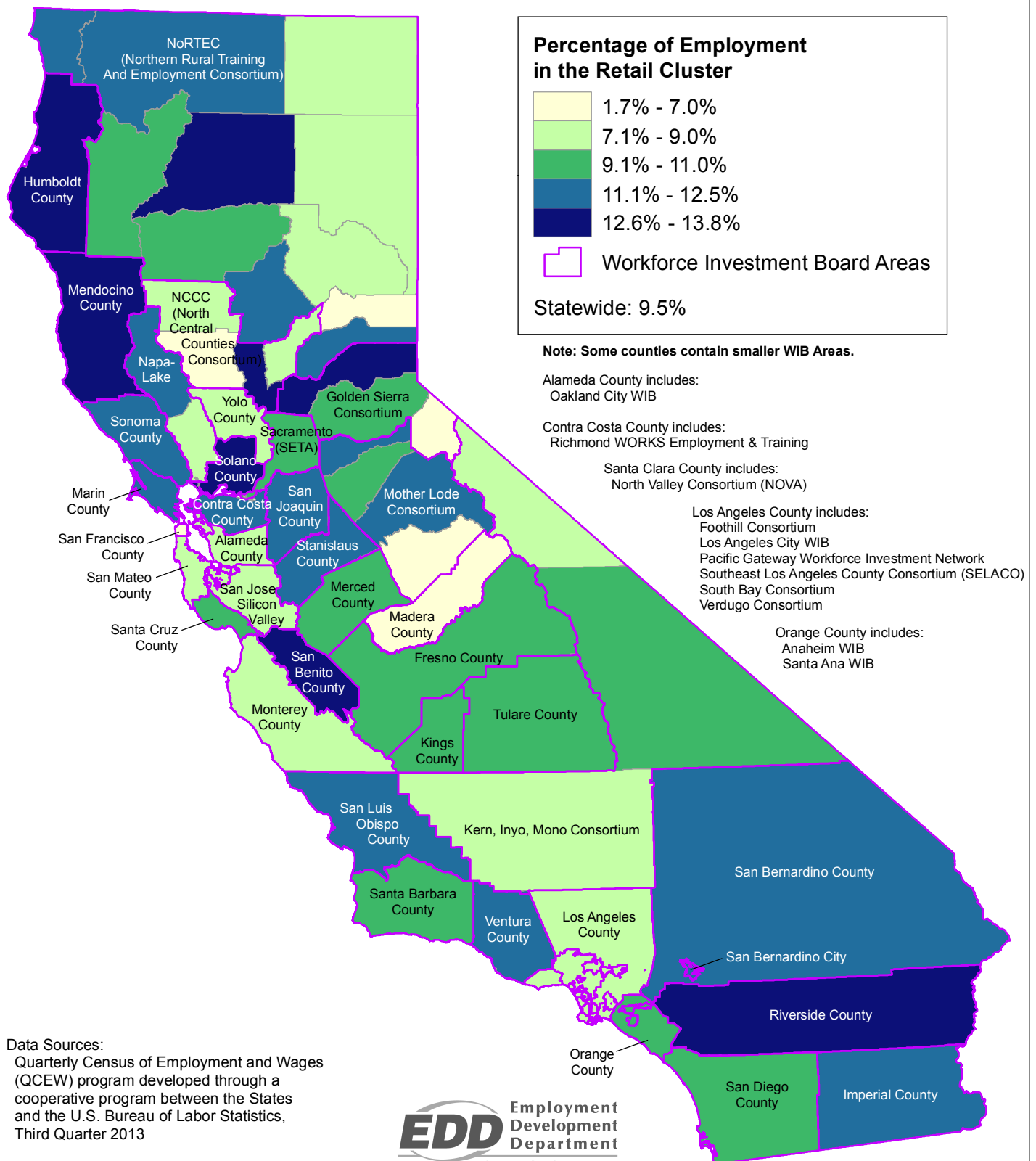
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California Retail Cluster

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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Labor Market Information Division
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July 2014

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