

PROGRAM ENDORSEMENT BRIEF



C·O·E

CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

AUTOMOTIVE COLLISION REPAIR IN THE GREATER SACRAMENTO REGION

North (Greater Sacramento)
Center of Excellence

JUNE 2021

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SUMMARY

The North/Far North Center of Excellence for Labor Market Research prepared this report to provide a labor market analysis of educational supply and occupational demand for middle-skilled career pathways in the North (Greater Sacramento) subregion. This report aims to determine if demand in the local labor market is unmet by the supply from existing community college programs and other postsecondary training providers.

This report primarily focuses on training that leads to jobs in middle-skilled occupations - that is, occupations that typically require education beyond a high school diploma but less than a Bachelor's degree - but may include higher-skilled occupations for training pathways that lead to a bachelor's degree. Lowered skilled occupations are rarely considered in this type of analysis due to the lessened barriers for entry-level work, such as no formal education requirements and no requirements for on-the-job training.

Key findings include:

- The North (Greater Sacramento) region held 2,383 autobody collision repair jobs in 2019. Jobs are projected to increase by 1% over the next five years, adding 28 new jobs to the subregion.
- Over the next five years, autobody collision repair occupations are projected to have 229 annual openings in the North (Greater Sacramento) region.
- Wage data shows that autobody collision repair occupations earn \$2 to \$15 above the subregion's living wage of \$13.18 per hour.
- Awards data analysis shows that North (Greater Sacramento) training providers conferred an average of 84 awards (certificates and associate degrees) in autobody repair programs over the last three academic years.

INTRODUCTION

The North (Greater Sacramento) Center of Excellence was asked to provide labor market information for a proposed program at a regional community college. This report focuses on the following Standard Occupational Classification (SOC) occupations and codes:

- Insurance Appraisers, Auto Damage (13-1032)
- Automotive Body and Related Repairers (49-3021)
- Automotive Glass Installers and Repairers (49-3022)
- Coating, Painting, and Spraying Machine Setters, Operators, and Tenders (51-9124)

A review of related programs revealed the following program(s) and Taxonomy of Programs (TOP) code(s) are appropriate for inclusion in this report:

- Automotive Collision Repair (0949.00)

The corresponding Classification of Instructional Programs (CIP) code(s) are:

- Autobody/Collision and Repair Technology/Technician (47.0603)

OCCUPATIONAL DEMAND

Exhibit 1 summarizes the five-year projected job growth for middle-skill and above middle-skill occupations in the North (Greater Sacramento) selected occupations, North/Far North, and California.

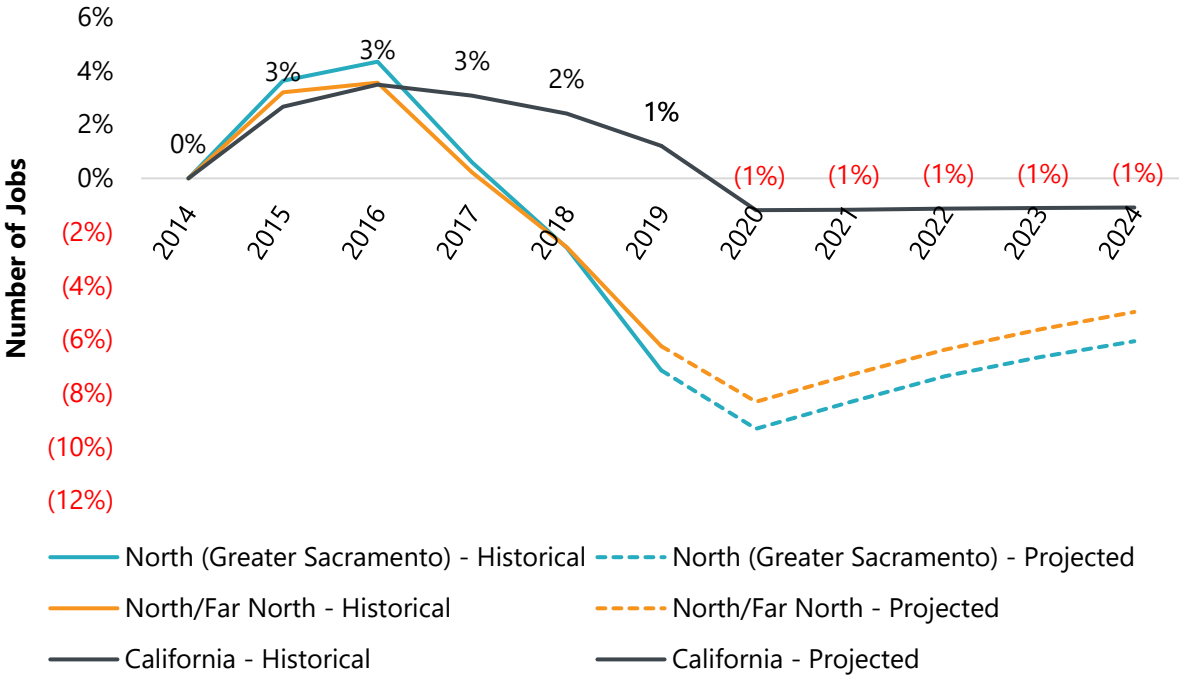
Exhibit 1. Middle skill employment and projected demand, 2019-2024

Occupation	2019 Jobs	2024 Jobs	2019-2024 Jobs Change	2019-2024 Jobs % Change	2019-2024 Annual Openings
Insurance Appraisers, Auto Damage	254	221	(33)	(13%)	18
Automotive Body and Related Repairers	1,161	1,179	18	2%	107
Automotive Glass Installers and Repairers	208	208	1	0%	21
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	761	803	42	6%	83
North (Greater Sacramento)	2,383	2,411	28	1%	229
Insurance Appraisers, Auto Damage	262	231	(31)	(12%)	19
Automotive Body and Related Repairers	1,536	1,560	24	2%	143
Automotive Glass Installers and Repairers	235	236	1	0%	23
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	1,033	1,081	48	5%	112
North/Far North	3,066	3,108	42	1%	297
Insurance Appraisers, Auto Damage	2,539	2,283	(256)	(10%)	179

Occupation	2019 Jobs	2024 Jobs	2019-2024 Jobs Change	2019-2024 Jobs % Change	2019-2024 Annual Openings
Automotive Body and Related Repairers	16,323	16,041	(282)	(2%)	1,402
Automotive Glass Installers and Repairers	2,936	2,824	(111)	(4%)	269
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	14,239	14,072	(167)	(1%)	1,383
California	36,037	35,221	(816)	(2%)	3,233

Exhibit 2 compares the percent change in jobs between 2014 through 2019 and the projected changes through 2024. The rate of change is indexed to the total number of jobs in 2014.

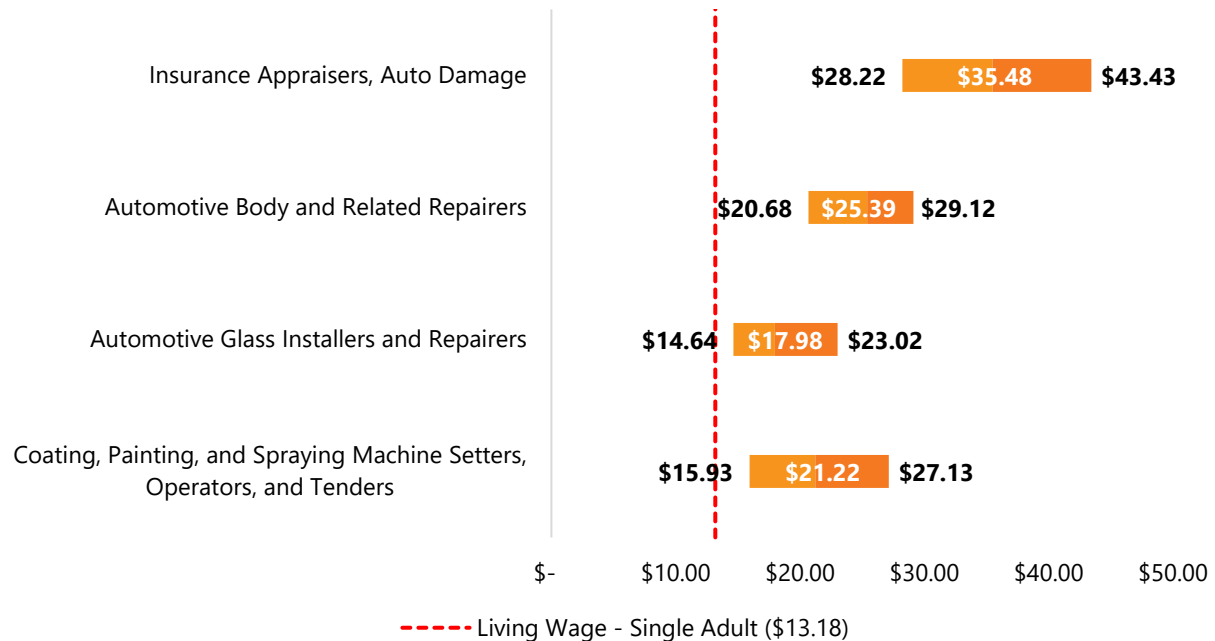
Exhibit 2. Changes in employment, 2014-2024



WAGES

Exhibit 3 compares the entry-level, median, and experienced wages for the selected occupations to the North (Greater Sacramento) living wage for a single adult - \$13.18 per hour.¹

Exhibit 3. Comparison of wages by occupation, 2019



JOB POSTINGS

This section of the report analyzes recent data from online job postings (real-time LMI). Online job postings may provide additional insight into recent changes in the labor market that are not captured by historical trends.

The NFN COE identified 626 online job postings for the selected occupations in the North (Greater Sacramento) region. Job postings data comes from Burning Glass Labor Insights and represents new listings posted online within the last year, from June 1, 2020, to May 31, 2021.

¹ Living wage is defined as the level of income a single adult with no children must earn to meet basic needs, including food, housing, transportation, healthcare, taxes, and other miscellaneous basic needs. The 25th-percentile and 75th-percentile hourly wages are used as proxy for entry-level and experienced-level wages.

Occupations and Job Titles

Exhibit 4 details the number of online job postings for the selected occupations.

Exhibit 4. Number of job postings by occupation

Occupation	Job Postings	Share of Job Postings
Automotive Body and Related Repairers	455	73%
Insurance Appraisers, Auto Damage	83	13%
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	46	7%
Automotive Glass Installers and Repairers	42	7%
Total Job Postings	626	100%

Exhibit 5 shows the top 10 job titles with the most job postings and the share of job postings. All job postings included a job title.

Exhibit 5. Top jobs titles

Job Title	Job Postings	Share of Job Postings
Auto Body Technician	112	18%
Collision Estimator	40	6%
Body Technician	31	5%
Collision Repair Technician	30	5%
Auto Body Collision Technician	27	4%
Auto Glass Technician Trainee	22	4%
Auto Repair Technician	13	2%
Body Shop Technician	10	2%
Measure Technician	9	1%
Paint Prepper	8	1%

Employers

Exhibit 6 shows the top 10 employers with the most job postings for the selected occupations. Fifteen percent (n = 96) of job postings did not include an employer.

Exhibit 6. Employers with the most job postings

Employer	Job Postings	Share of Job Postings
Caliber Collision	170	27%
Service King	30	5%
Safelite Autoglass	26	4%
Autonation	15	2%
Golden State Measures	8	1%
Carstar Capitol Collision Center	8	1%
Kearney's Painting	7	1%
AAA Northern California, Nevada & Utah	7	1%
Victory Automotive	6	1%
Toledo Industrial Coatings	6	1%

Certifications, Skills, and Experience

Exhibit 7 shows the most relevant certifications requested by employers for the selected occupations. Fifty-eight percent (n = 366) of job postings did not include certification information.

Exhibit 7. Most in-demand certifications

Certification	Job Postings	Share of Job Postings
I-Car	41	7%
Automotive Service Excellence (ASE) Certification	37	6%
Welding Certification	4	1%
Air Brake Certified	4	1%

Certification	Job Postings	Share of Job Postings
Body Shop	3	0%
Air Conditioning (AC) Certification	3	0%
Advanced Engine Performance Certified	3	0%
Six Sigma Green Belt Certification	1	0%
Security Clearance	1	0%
Environmental Protection Agency Certification	1	0%

Exhibit 8 shows the specialized skills most requested by employers for the selected occupations.

Exhibit 8. Most in-demand specialized skills

Specialized Skill	Job Postings	Share of Job Postings
Repair	425	68%
Auto Repair	317	51%
Welding	115	18%
Cleaning	112	18%
Customer Service	88	14%
Automotive Painting	74	12%
Estimating	71	11%
Painting	71	11%
Customer Contact	70	11%
Personal Protective Equipment (PPE)	63	10%

Exhibit 9 shows the minimum level of education required by employers for job postings for the selected occupations. Seventy-five percent (n = 469) of job postings did not include a preferred education level.

Exhibit 9. Employer-preferred minimum education levels

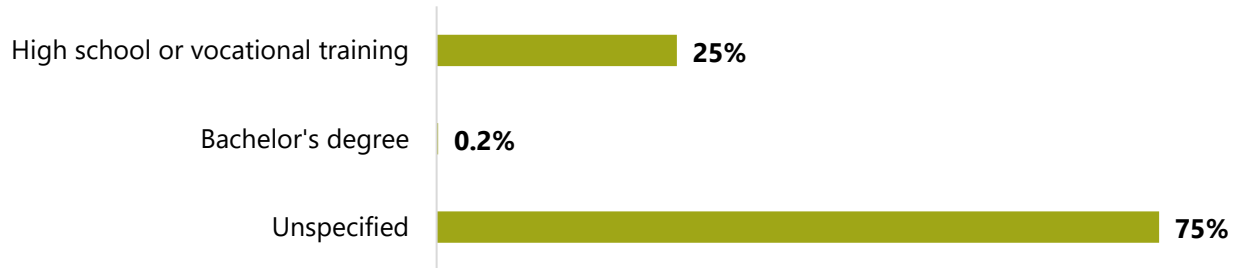
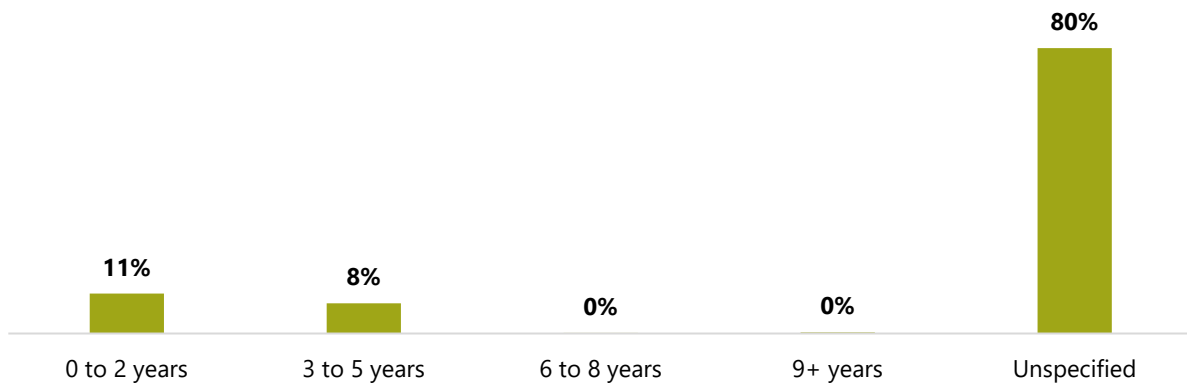


Exhibit 10 shows the experience levels required by employers for job postings for the selected occupations. Eighty percent (n = 500) of job postings did not include a preferred education level.

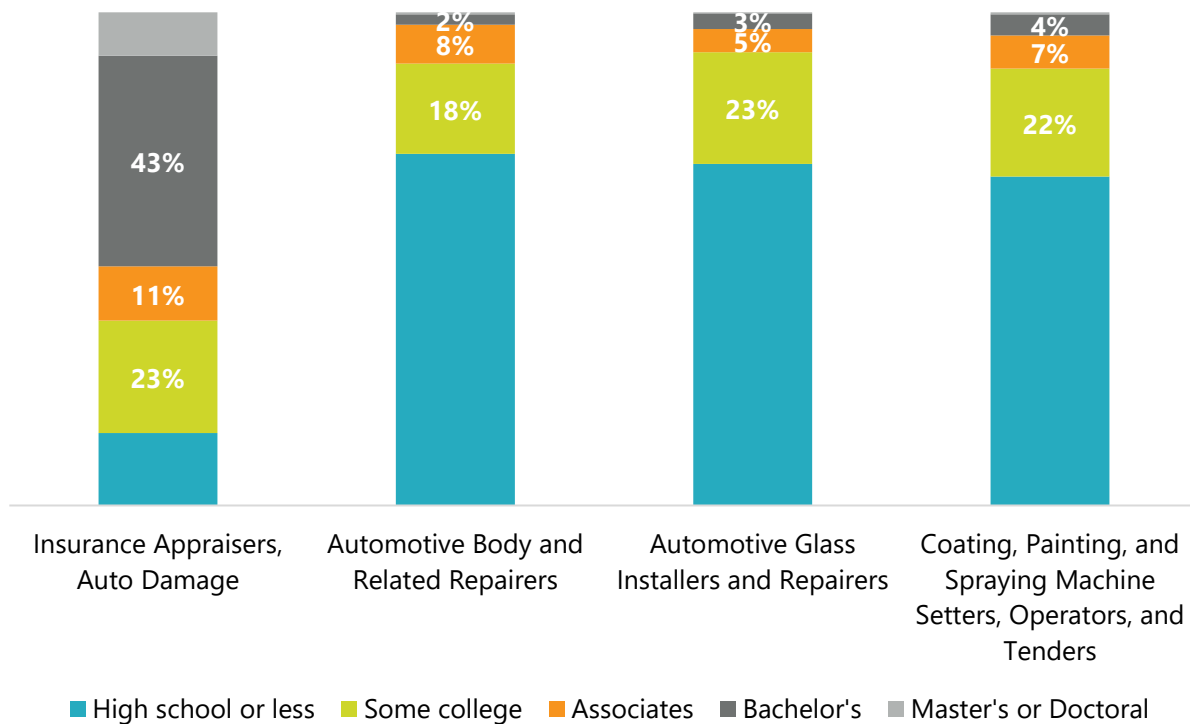
Exhibit 10. Employer-preferred experience levels



EDUCATION AND TRAINING

The U.S. Census Bureau and Bureau of Labor Statistics collected data on education achieved by workers employed in occupations. Exhibit 11 shows the national-level educational attainment of the current workforce in the selected occupations.

Exhibit 11. National worker educational attainment for selected occupations, 2019



The Bureau of Labor Statistics (BLS) uses a system to assign categories for entry-level education, work experience in a related occupation, and typical on-the-job training to each occupation for which the BLS publishes projections data. Exhibit 12 shows the skill level and entry-level job requirements for the selected occupations.

Exhibit 12. Typical education, work experience, and on-the-job training requirements

Occupation	Typical Entry-level Education	Work Experience Required	On-the-job Training Required
Insurance Appraisers, Auto Damage	Postsecondary nondegree award	None	Moderate-term on-the-job training
Automotive Body and Related Repairers	High school diploma or equivalent	None	Long-term on-the-job training

Occupation	Typical Entry-level Education	Work Experience Required	On-the-job Training Required
Automotive Glass Installers and Repairers	High school diploma or equivalent	None	Moderate-term on-the-job training
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	High school diploma or equivalent	None	Moderate-term on-the-job training

EDUCATIONAL SUPPLY

Educational supply for an occupation can be estimated by analyzing the number of awards issued in related Taxonomy of Programs (TOP) or Classification of Instructional Programs (CIP) codes. Exhibit 13 shows the TOP and CIP codes for educational programs related to the selected occupations.

Exhibit 13. TOP and CIP codes for training programs related to the selected occupations

TOP Programs and Codes	Aligned CIP Programs and Codes
Automotive Collision Repair (0949.00)	Autobody/Collision and Repair Technology/Technician (47.0603)

Community College Supply

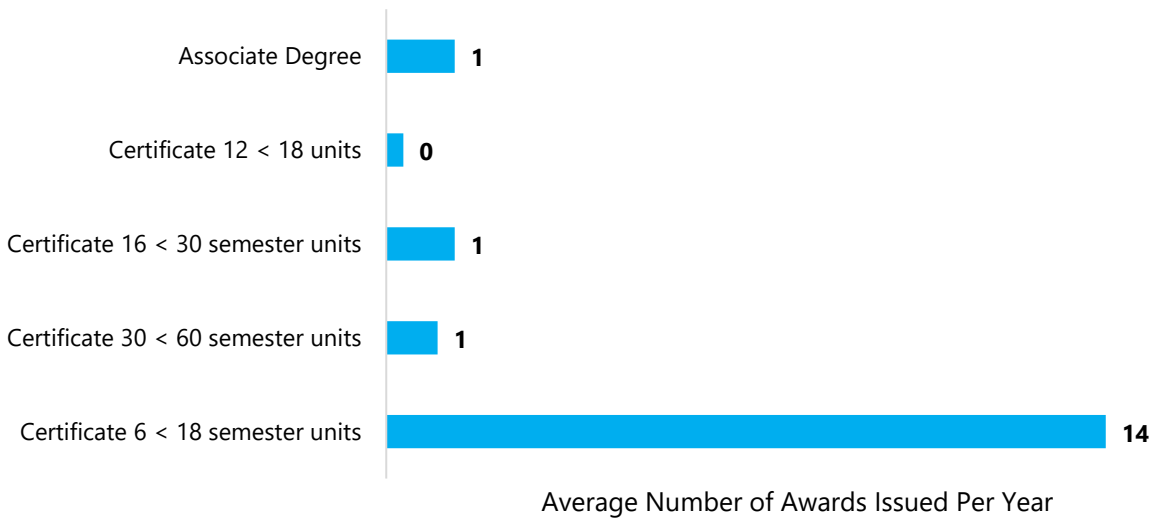
Exhibits 14 and 115 compare the average number of certificates and degrees conferred in selected community college programs over the last three academic years.

Exhibit 14. Annual average community college awards by program, 2017-18 through 2019-20

Program - TOP Code	College	Annual Awards 2017-18	Annual Awards 2018-19	Annual Awards 2019-20	3-Yr Annual Awards Average
Automotive Collision Repair (0949.00)	American River	37	8	3	16
	Yuba	1	4	1	2
	Subtotal	38	12	4	18

Program - TOP Code	College	Annual Awards 2017-18	Annual Awards 2018-19	Annual Awards 2019-20	3-Yr Annual Awards Average
	Grand Total	38	12	4	18

Exhibit 15. Annual average community college awards by type, 2017-18 through 2019-20



Other Postsecondary Supply

Exhibit 16 compares the average number of degrees conferred by non-community college training providers in the North (Greater Sacramento) area over the last three academic years. Please note that non-community college data lags by one year.

Exhibit 16. Other postsecondary awards by program, 2016-17 through 2018-19

Program - CIP Code	College	Annual Awards 2016-17	Annual Awards 2017-18	Annual Awards 2018-19	3-Yr Annual Awards Average
Autobody/Collision and Repair Technology/Technician (47.0603)	Universal Technical Institute of Northern California, Inc.	93	76	56	66
	Subtotal	93	76	56	66
	Grand Total	93	76	56	66

FINDINGS

- The North (Greater Sacramento) region held 2,383 autobody collision repair jobs in 2019.
- North (Greater Sacramento) autobody collision repair jobs are projected to increase by 1% over the next five years, adding 28 new jobs to the subregion by 2024. Jobs for autobody collision repair occupations are projected to grow faster in the North (Greater Sacramento) subregion than California.
- Over the next five years, autobody collision repair occupations are projected to have 229 annual openings in the North (Greater Sacramento) region.
- Wage data shows that autobody collision repair occupations earn approximately \$2 to \$15 above the subregion's living wage of \$13.18 per hour. Entry-level wages are highest for insurance appraisers, auto damage at \$28.22 per hour, and the lowest for automotive glass installers and repairers at \$14.64 per hour.
- According to real-time labor market information, there were about 626 online job postings for autobody collision repair occupations between June 1, 2020, and May 31, 2021. Seventy-three percent (n = 755) of job postings were for automotive body and related repairers.
- Between 26% and 34% of incumbent autobody collision repair workers have education attainment levels consistent with community college offerings (some college or associate degrees). While most of these occupations typically require only a high school diploma for entry-level work, all occupations require a minimum term of moderate-length (one to 12 months) on-the-job training. Automotive body and related repairers need a long-term (or greater than 12 months) of on-the-job training.
- Currently, two North (Greater Sacramento) community colleges offer degrees and certificates in programs related to autobody collision repair. Together, these programs conferred an average of 18 awards (certificates and associate degrees) in autobody collision repair programs over the last three academic years.
- Local private postsecondary training providers also offer autobody collision repair programs. However, these programs seem to be closing; the trainer's website no longer shows autobody as an active program as of June 28, 2021. Between 2016-17 and 2018-19, Universal Technical Institute of Northern California conferred an average of 66 awards in autobody collision repair programs over the last three years. Please note that non-community college awards data lags by one year.

RECOMMENDATIONS

- Based on a three-year average of annual awards in North (Greater Sacramento) region autobody collision repair programs and projected yearly openings, the supply gap analysis shows that the region seems to have room for additional training.
 - Together, community colleges and other postsecondary training providers issued an average of 84 awards over the last three years.
 - There are 229 projected annual openings for autobody collision repair occupations.
- The North/Far North Center of Excellence recommends moving forward with the program.

COE Recommendation		
Move forward with the program	Proceed with caution	Program is not recommended
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

APPENDIX A. METHODOLOGY AND SOURCES

Occupations in this report were identified using the Center of Excellence TOP-to-CIP-to-SOC crosswalk and O*Net OnLine. This report's findings were determined using labor market data from the Bureau of Labor Statistics (BLS), U.S. Census Bureau data from Emsi, and jobs posting data from Burning Glass.

Cal-PASS Plus LaunchBoard. California Community Colleges Chancellor's Office.

<https://www.calpassplus.org/LaunchBoard/Home.aspx>.

Emsi. <https://www.economicmodeling.com/>. EMSI occupational employment data are based on final EMSI industry data and final EMSI staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors).

Educational Attainment for Workers 25 Years and Older by Detailed Occupation, 2016-2017.

Bureau of Labor Statistics. <https://www.bls.gov/emp/tables/educational-attainment.htm#>.

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"Taxonomy of Programs." California Community Colleges Chancellor's Office. June 2012, 6th Edition. <https://www.cccco.edu/-/media/CCCCO-Website/About-Us/Divisions/Educational-Services-and-Support/Academic-Affairs/What-we-do/Curriculum-and-Instruction-Unit/Files/TOPmanual6200909corrected12513pdf.ashx>

"TOP-CIP-SOC Crosswalk." Centers of Excellence for Labor Market Research. November 2015 Edition. <http://coecc.net/>

COVID-19 Statement: This report includes employment projection data by EMSI. EMSI's projections are modeled on recorded (historical) employment figures and incorporate several underlying assumptions, including the assumption that the economy during the projection period will be at approximately full employment or potential output. To the extent that a recession or labor shock, such as the economic effects of COVID-19, can cause long-term structural change, they may impact the projections. At this time, it is not possible to quantify the impact of COVID-19 on projections of industry and occupational employment. Other measures such as unemployment rates and monthly industry employment estimates will reflect the most recent information on employment and jobs in the state and, in combination with input from local employers, may help validate current and future employment needs as depicted here.

Important Disclaimer: All representations included in this report have been produced from primary research and/or secondary review of publicly and/or privately available data and/or research reports. Efforts have been made to qualify and validate the accuracy of the data and the reported findings; however, neither the Centers of Excellence, COE host District, nor California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges or their representatives based upon components or recommendations contained in this study.

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Centers of Excellence for Labor Market Research, Economic and
Workforce Development Program



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