

LABOR MARKET ANALYSIS

FOR PROGRAM RECOMMENDATION



C·O·E

CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

FASHION PRODUCTION IN THE GREATER SACRAMENTO REGION

North (Greater Sacramento)
Center of Excellence

FEBRUARY 2022

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SUMMARY

The North (Greater Sacramento) 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 - jobs 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 and on-the-job training requirements.

Key findings include:

- The North (Greater Sacramento) subregion held 103 fashion production jobs in 2020.
- Over the next five years, fashion production jobs are projected to have 15 annual openings in the North (Greater Sacramento) subregion. Most of these job openings are for fashion designers.
- Wage data shows that while median wages are above the subregion's living wage of \$14.53 per hour, entry-level wages are either below or just above the living wage.
- Awards data analysis shows that North (Greater Sacramento) training providers conferred an average of 34 awards (certificates and associate degrees) across all fashion programs over the last three academic years.

Recommendations include:

- North (Greater Sacramento) community colleges should also ensure that program outcomes align with the region's mission of training students for in-demand jobs that pay a living wage.
- The North (Greater Sacramento) Center of Excellence does not recommend expanding existing North (Greater Sacramento) fashion programs.

INTRODUCTION

The North (Greater Sacramento) Center of Excellence (COE) 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:

- These middle-skill occupations require more education and training beyond a high school diploma but less than a four-year degree:
 - Fashion Designers (27-1022)
- Other occupations studied include:
 - Fabric and Apparel Patternmakers (51-9062)

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

- Fashion Production (1303.30)

The corresponding Classification of Instructional Program (CIP) title(s) and code(s) are:

- Apparel and Textile Manufacture (19.0902)

OCCUPATIONAL DEMAND

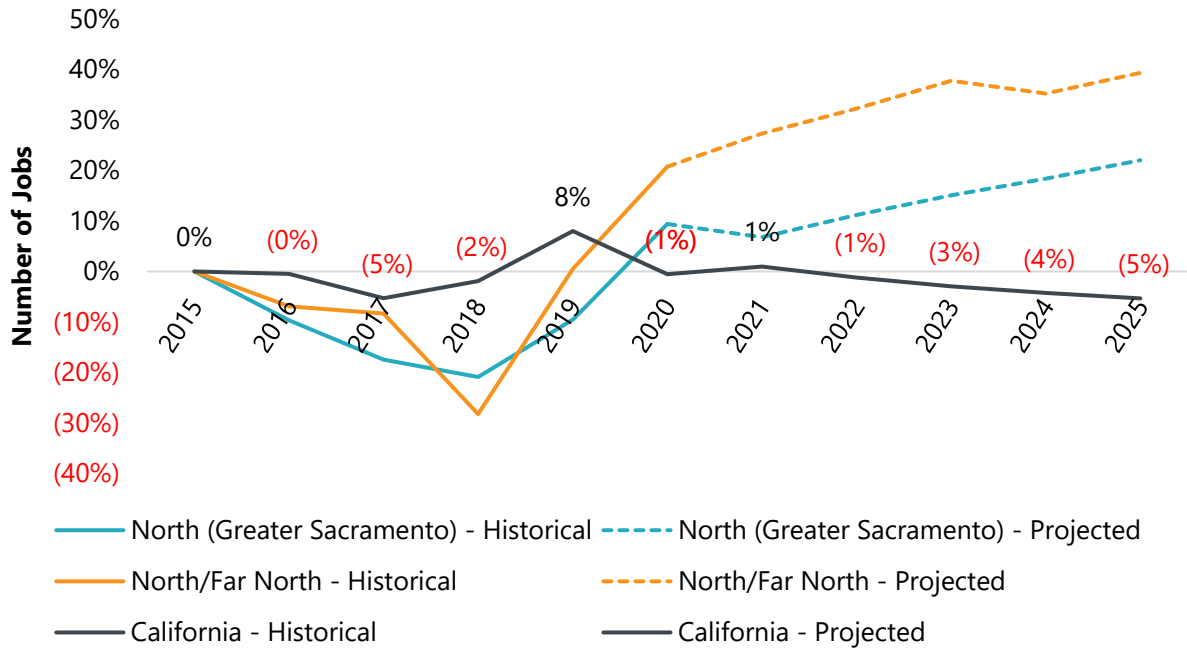
Exhibit 1 summarizes the five-year projected job growth for middle-skill and high-skill occupations in the North, North/Far North, and California.

Exhibit 1. Employment and projected demand, 2020-2025

Occupation	2020 Jobs	2025 Jobs	2020-2025 Change	2020-2025 % Change	2020-2025 Annual Openings
Fashion Designers	93	115	22	24%	14
Fabric and Apparel Patternmakers	10	<10	N/A	N/A	1
North (Greater Sacramento)	103	115	22	21%	15
Fashion Designers	138	172	33	24%	21
Fabric and Apparel Patternmakers	11	<10	N/A	N/A	1
North/Far North	149	172	33	22%	22
Fashion Designers	7,510	7,371	(139)	(2%)	749
Fabric and Apparel Patternmakers	1,083	809	(274)	(25%)	119
California	8,592	8,180	(413)	(5%)	868

Exhibit 2 compares the percent change in jobs between 2015 through 2020 and the projected changes through 2025. The rate of change is indexed to the total number of jobs in 2015.

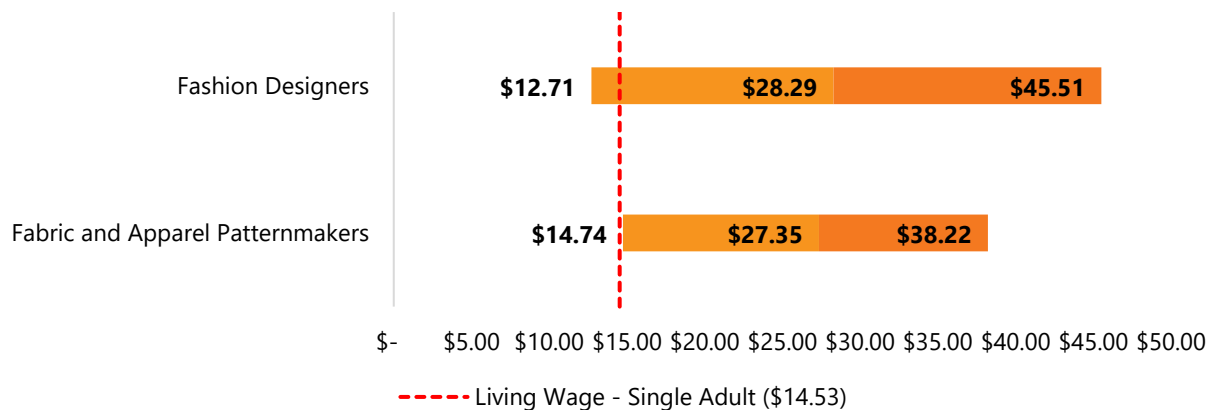
Exhibit 2. Changes in employment, 2015-2025



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 - \$14.53 per hour.¹

Exhibit 3. Comparison of wages by occupation, 2020



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.

JOB POSTINGS

This section 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 North COE identified *one* relevant online job postings for the selected occupations in the Greater Sacramento subregion. Job postings data comes from Burning Glass Labor Insights and represents new listings posted online within the last year, from February 1, 2021, to January 31, 2022.

Occupations and Job Titles

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

Exhibit 4. Summary of Job Posting

Job Posting Specifics	
Date of Posting	November 24, 2021
Occupation	Fashion Designer (27-1022)
Employer	Everlane (based at San Francisco HQ)
Job Title	Assistant Designer - Knits and Sweaters
Educational Requirements	Bachelor's Degree
Experience Requirements	Three to five years of experience

Exhibit 5 shows the top 10 skills across three categories for the studied occupations: specialized, human-centered, and technical skills.

Exhibit 5. Most in-demand specialized skills

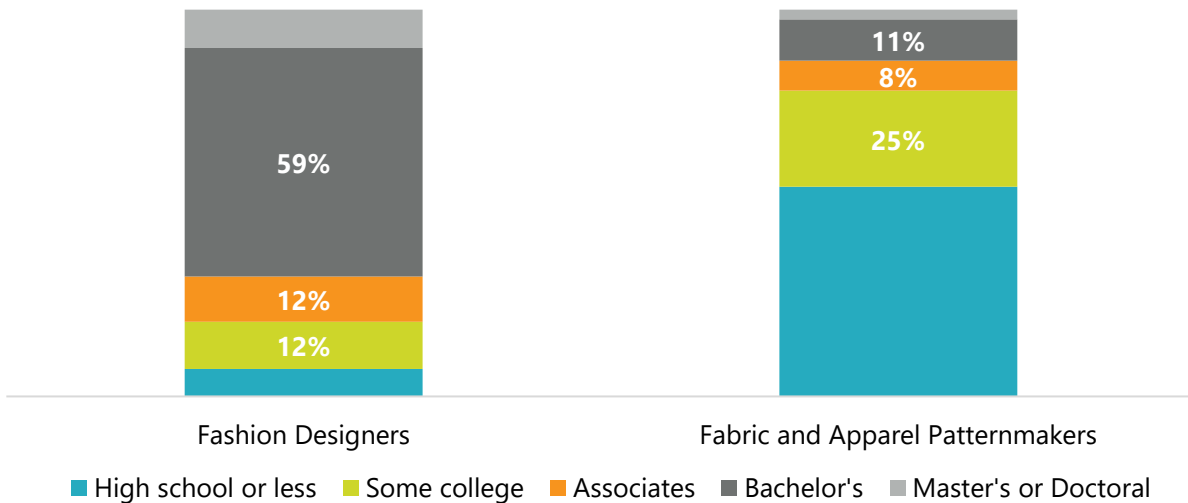
Top Specialized Skills	Top Human-Centered Skills	Top Technical Skills
Adobe Acrobat	Communication Skills	Adobe Acrobat
Adobe Creative Suite	Creative Problem Solving	Adobe Creative Suite
Adobe Illustrator	Creativity	Adobe Illustrator
Adobe InDesign	Detail-Oriented	Adobe InDesign

Top Specialized Skills	Top Human-Centered Skills	Top Technical Skills
Adobe Photoshop	Organizational Skills	Adobe Photoshop
Merchandising	Research	
Prepare Presentations		
Product Development		

EDUCATION AND TRAINING

The U.S. Census Bureau and Bureau of Labor Statistics collected data on education achieved by workers employed in occupations. Exhibit 6 shows the national-level educational attainment of the current workforce in the selected occupations.

Exhibit 6. 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 7 shows the skill level and entry-level job requirements for the selected occupations.

Exhibit 7. Typical education, work experience, and on-the-job training requirements

Occupation	Typical Entry-level Education	Work Experience Required	On-the-job Training Required
Fashion Designers	Bachelor's degree	None	None
Fabric and Apparel Patternmakers	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 8 shows the TOP and CIP codes for educational programs related to the selected occupations.

Exhibit 8. TOP and CIP codes for training programs related to the selected occupations

TOP Programs and Codes	Aligned CIP Programs and Codes
Fashion Production (1303.30)	Apparel and Textile Manufacture (19.0902)

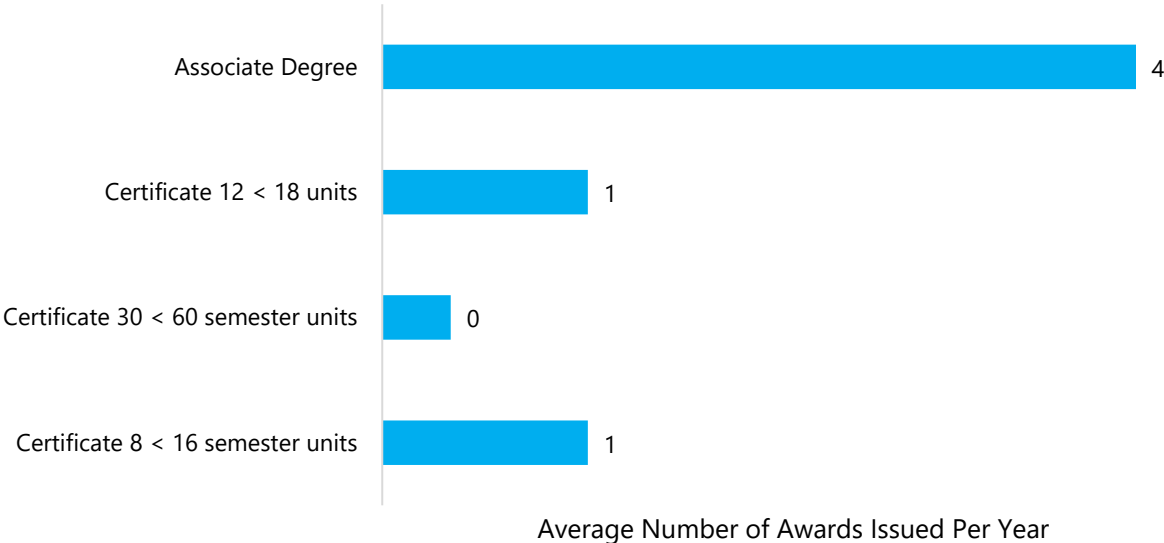
Community College Supply

Exhibits 9 and 10 compare the average number of certificates and degrees conferred in selected community college programs over the last three academic years.

Exhibit 9. Annual average community college fashion production awards, 2017-18 through 2019-20

Program - TOP Code	College	Annual Awards 2018-19	Annual Awards 2019-20	Annual Awards 2020-21	3-Yr Annual Awards Average
Fashion Production (1303.30)	Sacramento City	7	5	6	6
	Grand Total	7	5	6	6

Exhibit 10. Annual average community college awards by type, 2017-18 through 2019-20



Other Postsecondary Supply

There are no other fashion production training programs in the North (Greater Sacramento) subregion.

However, other fashion programs focus on design and merchandising in other North (Greater Sacramento) community colleges. Exhibit 11 summarizes the average number of certificates and degrees conferred in the selected community college programs over the last three academic years.

Exhibit 11. Annual average community college fashion awards, 2017-18 through 2019-20

Program - TOP Code	College	Annual Awards 2018-19	Annual Awards 2019-20	Annual Awards 2020-21	3-Yr Annual Awards Average
Fashion (1303.00)	Sierra	5	2	23	10
	Subtotal	5	2	23	10
Fashion Design (1303.10)	American River	4	5	12	7
	Sierra	3	1	5	3
	Subtotal	7	6	17	10
Fashion Merchandising	American River	3	1	2	2

Program - TOP Code	College	Annual Awards 2018-19	Annual Awards 2019-20	Annual Awards 2020-21	3-Yr Annual Awards Average
(1303.20)	Sierra	6	4	11	7
	Subtotal	9	5	13	9
	Grand Total	19	13	53	28

Please note that the values may not sum to a total due to rounding.

FINDINGS

- This report focuses on two occupations in the fashion production training pathway, including fashion designers and fabric and apparel patternmakers.
- The North (Greater Sacramento) subregion held 103 fashion production jobs in 2020. Fashion production jobs are projected to increase by 21% over the next five years, adding 22 new jobs to the subregion by 2025.
- Fashion production jobs are projected to grow faster in the North (Greater Sacramento) subregion than in California.
 - While fashion production job growth is significantly higher in the North subregion, most fashion production jobs are concentrated in other parts of the state. North (Greater Sacramento) fashion production jobs account for less than 1.5% of all fashion production jobs in California.
- Over the next five years, fashion production jobs are projected to have 15 annual openings in the North (Greater Sacramento) subregion.
 - More than 90% of the job openings are for fashion designers.
- Wage data shows that while median wages are above the subregion's living wage of \$14.53 per hour, entry-level wages are either below or just above the living wage.
 - Fashion designers' entry-level wages are below the living wage, while fabric and apparel patternmakers' entry-level wages are 21 cents above the living wage.
- According to real-time labor market information, there was one online job posting for fashion production occupations between February 1, 2021, and January 31, 2022. The job posting was for Everlane, an online fashion designer and retailer headquartered in San Francisco.
- Between 24% and 33% of incumbent workers in fashion production occupations have educational attainment levels consistent with community college offerings (some college or associate degrees).
 - Nearly 60% of incumbent fashion designers hold a bachelor's degree.
- While several North (Greater Sacramento) community colleges offer degrees and certificates in fashion programs, only one offers training related to fashion production. Sacramento City conferred an average of 6 awards (certificates and associate degrees) in fashion production programs over the last three academic years (2018-19 through 2020-21).

- American River and Sierra conferred an average of 28 awards in fashion, fashion design, and fashion merchandising programs over the last three academic years (2018-19 through 2020-21).

RECOMMENDATIONS

- Based on a three-year average of annual awards in North (Greater Sacramento) subregion fashion production programs and projected yearly openings, the supply gap analysis shows that the region does not seem to have room for additional training.
 - When considering only fashion production programs, the program supply does not meet the occupational demand. However, since multiple fashion programs train towards the same occupation (i.e., fashion designers), it is essential to consider these awards in the supply gap analysis.
 - Together, North (Greater Sacramento) community colleges issued an average of 34 awards across all fashion training programs over the last three years.
 - There are 14 projected annual openings for fashion designers jobs.
- The North (Greater Sacramento) Center of Excellence recommends that community college fashion programs examine their Strong Workforce Program outcomes to ensure that students in fashion training pathways achieve equitable results.
- North (Greater Sacramento) community college should ensure that students achieve outcomes aligned with their intended educational goal (i.e., employment within the field of study and transfer goals).
- North (Greater Sacramento) community colleges should also ensure that program outcomes align with the region's mission of training students for in-demand jobs that pay a living wage.
- The North (Greater Sacramento) Center of Excellence does not recommend expanding existing North (Greater Sacramento) fashion programs.

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

APPENDIX A. METHODOLOGY AND SOURCES

This report identified Occupations 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 2021.4; QCEW Employees, Non-QCEW Employees, and Self-Employed.

<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#>.

Integrated Postsecondary Education Data System (IPEDS). National Center for Education Statistics. U.S. Department of Education. <https://nces.ed.gov/ipeds/>.

"Labor Insight Real-Time Labor Market Information Tool." Burning Glass Technologies.

<http://www.burning-glass.com>.

Labor Market Information Division. California Employment Development Department.

<https://labormarketinfo.edd.ca.gov/>.

Management Information Systems (MIS) Data Mart. California Community Colleges Chancellor's Office. <https://datamart.cccco.edu/>.

Occupational Employment Statistics (OES). Bureau of Labor Statistics.

<https://www.bls.gov/oes/home.htm>.

O*NET OnLine. U.S. Department of Labor/Employment and Training Administration (DOL ETA).

<https://www.onetonline.org/>.

Self-Sufficiency Standard Tool for California. The University of Washington.

<http://www.selfsufficiencystandard.org/>

"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.aspx](https://www.coecc.net/Us/Divisions/Educational-Services-and-Support/Academic-Affairs/What-we-do/Curriculum-and-Instruction-Unit/Files/TOPmanual6200909corrected12513pdf.aspx)

"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
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