



Regional Economic Analysis Profile

California

April 2014



EDD Employment
Development
Department
State of California

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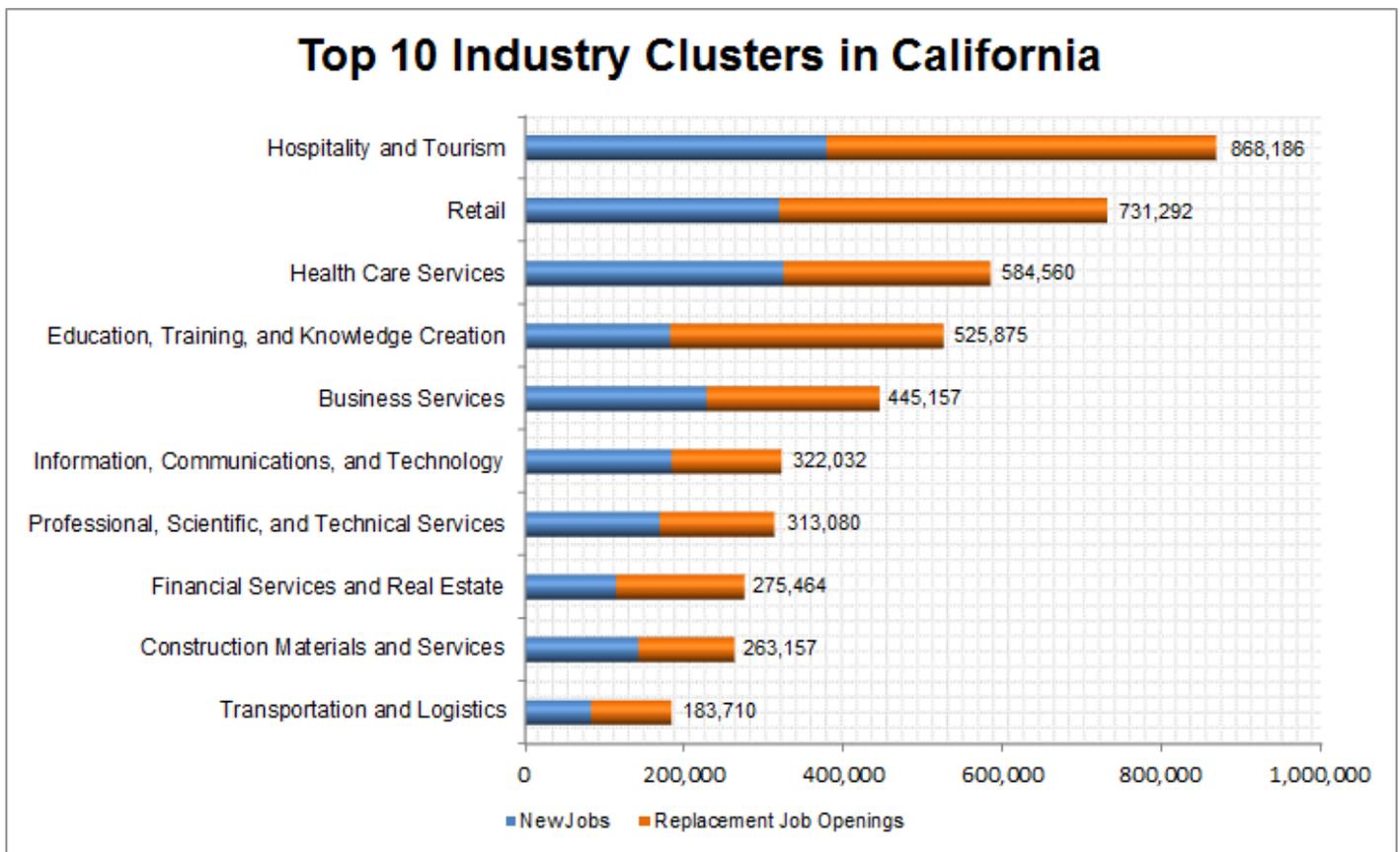
SUMMARY OF CALIFORNIA INDUSTRY CLUSTERS

What is an Industry Cluster?

Industry clusters are groups of associated industries in a region 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 regional economic growth and boost the number of employment opportunities for a regional 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 regional industry clusters. This report focuses on the future employment needs of regional 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 future job opportunities and help the California workforce development system prepare the state's workforce to compete for these future employment opportunities.



Source: California Employment Development Department, Projections of Employment 2010-2020.

SUMMARY OF CALIFORNIA INDUSTRY CLUSTERS

The table below lists the estimated numbers of new jobs, replacement needs, and total job openings for the top 10 industry clusters in California for the 2010-2020 projections period.

Top 10 Industry Clusters in California	New Jobs ¹	Replacement Needs ²	Total Job Openings ³
Hospitality and Tourism	378,600	489,586	868,186
Retail	318,700	412,592	731,292
Health Care Services	324,000	260,560	584,560
Education, Training, and Knowledge Creation	181,800	344,075	525,875
Business Services	227,700	217,457	445,157
Information, Communications, and Technology	183,800	138,232	322,032
Professional, Scientific, and Technical Services	168,900	144,180	313,080
Financial Services and Real Estate	113,800	161,664	275,464
Construction Materials and Services	142,200	120,957	263,157
Transportation and Logistics	82,300	101,410	183,710

Source: California Employment Development Department, *Projections of Employment 2010-2020*.

¹ 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.

² Replacement needs estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

³ Total job openings are the sum of new jobs and replacement needs.

DESCRIPTIONS OF INDUSTRY CLUSTERS

The **Hospitality and Tourism** industry cluster includes interrelated industries such as eating establishments, hotels and motels, casinos, museums, and sightseeing transportation. For fiscal year 2011-2012, this cluster comprised almost 1.6 million workers, 10.8 percent of the state's employment. Industries within this cluster with the most projected job openings include:

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

The **Retail** industry cluster includes grocery and department stores, dollar stores, retail pharmacies, and clothing specialty stores. During fiscal year 2011-2012, this cluster employed almost 1.4 million workers or 9.6 percent of the state's total employment. Industries projected to have the largest number of jobs (new and replacement) include:

- Grocery Stores
- Department Stores
- Other General Merchandise Stores
- Clothing Stores
- Health and Personal Care Stores

The **Health Care Services** industry cluster includes acute care and outpatient hospitals, nursing home and rehabilitation centers, adult day care centers, and community service agencies for the elderly. It employed more than 1.4 million people in the state as of fiscal year 2011-2012, accounting for 9.9 percent of the workforce. Top industries within this cluster include:

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

The **Education, Training, and Knowledge Creation** industry cluster is comprised of 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 2011-2012, this cluster employed more than 1.4 million people in California, accounting for 9.9 percent of the workforce. Top industries within this cluster include:

- Elementary and Secondary Schools
- Junior Colleges
- Business Schools and Computer and Management Training
- Technical and Trade Schools
- Other Schools and Instruction

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 1 million people during the 2011-2012 fiscal year, 7.3 percent of the state's workforce. Top industries in this cluster include:

- Employment Services
- Services to Buildings and Dwellings
- Investigation and Security Services
- Business Support Services
- Other Support Services

DESCRIPTIONS OF INDUSTRY CLUSTERS

The **Information, Communications, and Technology** 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. During 2011-2012, more than 725,000 people were employed in California, 5 percent of the state's workforce. Industries with the highest number of expected job openings include:

- Computer Systems Design and Related Services
- Wholesale Electronic Markets and Agents and Brokers
- Semiconductor and Other Electronic Component Manufacturing
- Software Publishers
- Computer and Peripheral Equipment Manufacturing

The **Professional, Scientific, and Technical Services** industry cluster is comprised of interrelated industries that include engineering and architectural firms, law offices, advertising companies, and accounting firms. In 2011-2012, almost 730,000 people were employed in the state, 5 percent of the state's workforce. Top industries within this cluster include:

- Management, Scientific, and Technical Consulting Services
- Architectural, Engineering, and Related Services
- Legal Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Advertising, Public Relations, and Related 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 more than 700,000 people and accounted for nearly 5 percent of the state's workforce in 2011-2012. Industries showing the highest projected job openings include:

- Depository Credit Intermediation
- Activities Related to Real Estate
- Agencies, Brokerages, and Other Insurance Related Activities
- Nondepository Credit Intermediation
- Insurance Carriers

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 2011-2012, over 640,000 workers made up the cluster's employment, representing 4.4 percent of the state's total workforce.

- Building Equipment Contractors
- Building Finishing Contractors
- Residential Building Construction
- Foundation, Structure, and Building Exterior Contractors
- Nonresidential Building Construction

The **Transportation and Logistics** cluster is made up of interrelated industries such as refrigerated warehousing, self-storage facilities, freight transporting companies, and overnight delivery businesses. In 2011-2012, over 480,000 workers were employed in this cluster, making up 3.3 percent of the state's workforce population.

- Warehousing and Storage
- General Freight Trucking
- Couriers and Express Delivery Services
- Specialized Freight Trucking
- Freight Transportation Arrangement

INDUSTRIES WITHIN EACH CALIFORNIA INDUSTRY CLUSTER

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 California.

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
- 4451 Grocery Stores
- 4452 Specialty Food Stores
- 4453 Beer, Wine, and Liquor Stores
- 4461 Health and Personal Care Stores
- 4471 Gasoline Stations
- 4481 Clothing Stores
- 4482 Shoe Stores
- 4483 Jewelry, Luggage, and Leather Goods Stores
- 4511 Sporting Goods, Hobby, and Musical Instrument Stores
- 4521 Department Stores
- 4529 Other General Merchandise Stores
- 4532 Office Supplies, Stationery, and Gift Stores
- 4533 Used Merchandise Stores
- 4542 Vending Machine Operators

Health Care Services

- 6211 Offices of Physicians
- 6212 Offices of Dentists

Health Care Services (Continued)

- 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

Education, Training, and Knowledge Creation

- 5417 Scientific Research and Development Services
- 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

Business Services

- 5511 Management of Companies and Enterprises
- 5611 Office Administrative Services
- 5612 Facilities Support Services
- 5613 Employment Services
- 5614 Business Support Services
- 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, Communications, and Technology

- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications Equipment Manufacturing
- 3344 Semiconductor and Other Electronic Component Manufacturing

INDUSTRIES WITHIN EACH CALIFORNIA INDUSTRY CLUSTER

Information, Communications, and Technology (Continued)

- 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, Scientific, 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

Construction Materials and Services

- 2123 Nonmetallic Mineral Mining and Quarrying
- 2131 Support Activities for Mining
- 2213 Water, Sewage and Other Systems

Construction Materials and Services (Continued)

- 2361 Residential Building Construction
- 2362 Nonresidential Building Construction
- 2372 Land Subdivision
- 2373 Highway, Street, and Bridge Construction
- 2379 Other Heavy and Civil Engineering Construction
- 2381 Foundation, Structure, and Building Exterior Contractors
- 2382 Building Equipment Contractors
- 2383 Building Finishing Contractors
- 2389 Other Specialty Trade Contractors
- 3211 Sawmills and Wood Preservation
- 3271 Clay Product and Refractory Manufacturing
- 3272 Glass and Glass Product Manufacturing
- 3273 Cement and Concrete Product Manufacturing
- 3274 Lime and Gypsum Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 3351 Electric Lighting Equipment Manufacturing

Transportation and Logistics

- 3365 Railroad Rolling Stock Manufacturing
- 3366 Ship and Boat Building
- 4811 Scheduled Air Transportation
- 4812 Nonscheduled Air Transportation
- 4821 Rail Transportation
- 4831 Deep Sea, Coastal, and Great Lakes Water Transportation
- 4832 Inland Water Transportation
- 4841 General Freight Trucking
- 4842 Specialized Freight Trucking
- 4851 Urban Transit Systems
- 4852 Interurban and Rural Bus Transportation
- 4853 Taxi and Limousine Service
- 4854 School and Employee Bus Transportation
- 4855 Charter Bus Industry
- 4859 Other Transit and Ground Passenger Transportation
- 4881 Support Activities for Air Transportation
- 4882 Support Activities for Rail Transportation
- 4883 Support Activities for Water Transportation
- 4884 Support Activities for Road Transportation
- 4885 Freight Transportation Arrangement
- 4889 Other Support Activities for Transportation
- 4921 Couriers and Express Delivery Services
- 4922 Local Messengers and Local Delivery
- 4931 Warehousing and Storage
- 5321 Automotive Equipment Rental and Leasing
- 8113 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance



Occupational Analysis: Hospitality and Tourism

California

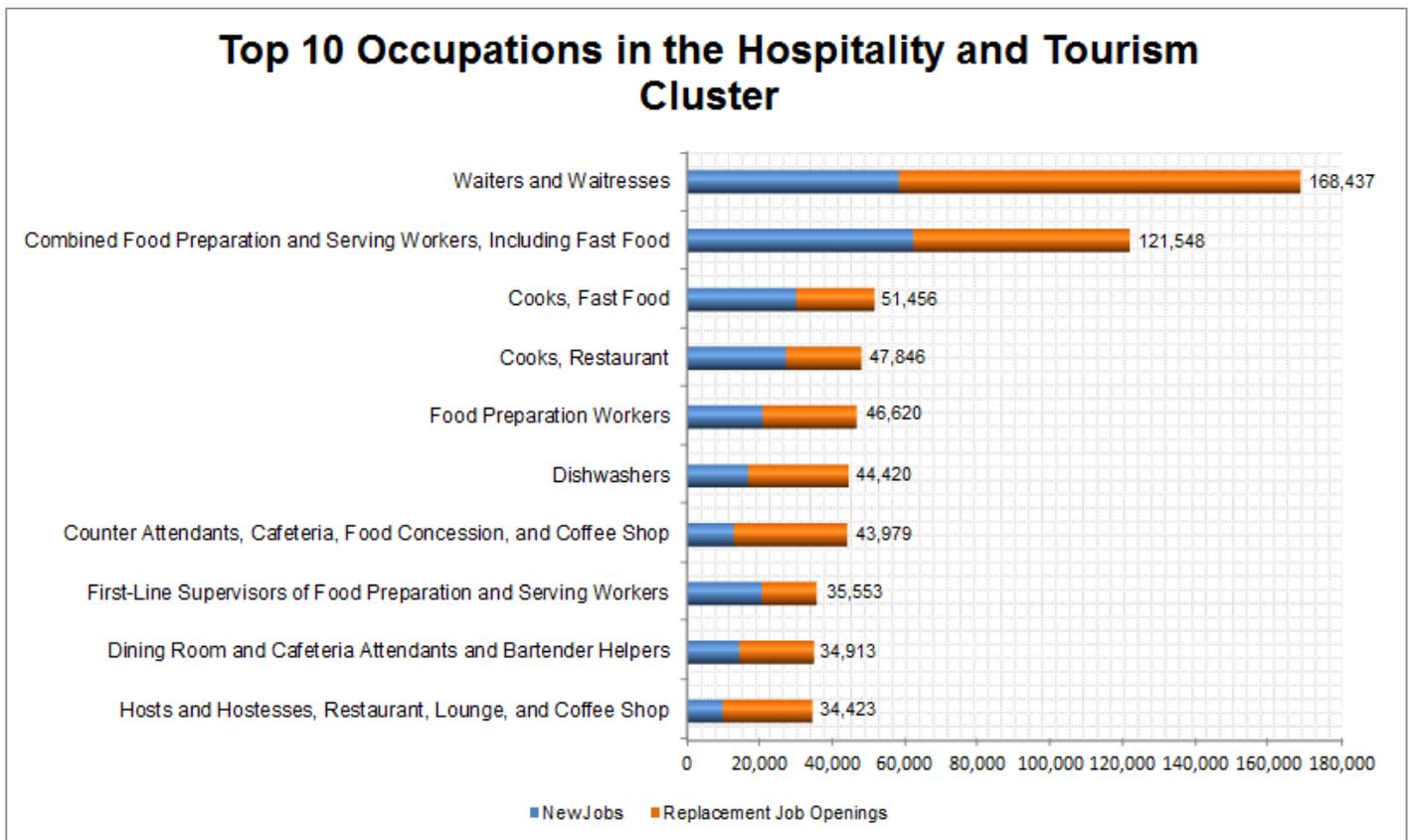
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What is the Hospitality and Tourism Cluster?

The Hospitality and Tourism cluster is comprised of 14 industries that provide goods and services related to lodging, food, recreation, travel, conventions, and transportation. 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.

High-Growth Occupations in Hospitality and Tourism

The graph below identifies the top 10 occupations in the Hospitality and Tourism cluster, based on statewide new job growth plus replacement openings. In sum, these 10 occupations represent more than two-thirds of the 868,000 total job openings projected in this cluster between 2010 and 2020. Moreover, many share the same required skills such as active listening, coordination, service orientation, and social perceptiveness.⁴



Source: California Employment Development Department, Projections of Employment 2010-2020.

⁴ U.S. Department of Labor's Occupational Information Network at www.onetonline.org

High-Growth Occupations and Recent Job Demand in Hospitality and Tourism Cluster

The table below further profiles the top 10 occupations in the Hospitality and Tourism cluster by listing total job openings for 2010-2020, median annual wage, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ⁵ (2010-2020)	Median Annual Wage (2012)	Entry Level Education ⁶	HWOL Job Advertisements ⁷ (120 days)
Waiters and Waitresses	168,437	\$18,910	Less than high school	7,589
Combined Food Preparation and Serving Workers, Including Fast Food	121,548	\$19,086	Less than high school	7,310
Cooks, Fast Food	51,456	\$18,738	Less than high school	746
Cooks, Restaurant	47,846	\$23,650	Less than high school	8,114
Food Preparation Workers	46,620	\$19,622	Less than high school	2,179
Dishwashers	44,420	\$19,013	Less than high school	3,239
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	43,979	\$19,411	Less than high school	1,878
First-Line Supervisors of Food Preparation and Serving Workers	35,553	\$28,034	High school diploma or equivalent	19,435
Dining Room and Cafeteria Attendants and Bartender Helpers	34,913	\$18,850	Less than high school	2,289
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	34,423	\$19,202	Less than high school	2,073

Source: California Employment Development Department, Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

⁵ Total job openings are the sum of new jobs and replacement needs.

⁶ U.S. Department of Labor, Bureau of Labor Statistics (BLS) education levels.

⁷ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

Key Occupations by Education Level

The table below identifies key occupations with the most total job openings, categorized by entry-level education requirements, within the Hospitality and Tourism cluster. The table includes the statewide projected job openings and median annual wages at the statewide level. Added to this are recent totals of online job advertisements over a recent 120-day period. 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 (2010-2020)	Median Annual Wage (2012)	HWOL Job Advertisements (120 days)
Requires a Bachelor's Degree or Higher			
Meeting, Convention, and Event Planners	1,341	\$50,649	973
Recreation Workers	868	\$23,402	1,506
Accountants and Auditors	587	\$69,244	22,798
Curators	540	\$64,475	29
Sales Managers	404	\$109,926	12,956
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree			
General and Operations Managers	3,111	\$111,247	8,942
Massage Therapists	942	\$34,422	2,113
Audio and Video Equipment Technicians	471	\$47,280	735
Skincare Specialists	209	\$29,713	989
Sound Engineering Technicians	157	\$63,327	108
Requires a High School Diploma or Equivalent or Less			
Waiters and Waitresses	168,437	\$18,910	7,589
Combined Food Preparation and Serving Workers, Including Fast Food	121,548	\$19,086	7,310
Cooks, Fast Food	51,456	\$18,738	746
Cooks, Restaurant	47,846	\$23,650	8,114
Food Preparation Workers	46,620	\$19,622	2,179

Source: California Employment Development Department, Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

Skill Requirements

The table below lists the top 10 skills required for key Hospitality and Tourism cluster occupations. Critical thinking is the most commonly shared skill, followed by active listening, monitoring, and speaking. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupation	Skills																							
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Operations Analysis	Persuasion	Quality Control Analysis	Reading Comprehension	Service Orientation	Social Perceptiveness	Speaking	Systems Analysis	Time Management	Writing
Requires a Bachelor's Degree or Higher																								
Accountants and Auditors ⁸	•	•			•		•			•	•							•			•	•		•
Curators	•	•		•	•		•				•							•			•		•	•
Meeting, Convention, and Event Planners		•		•	•						•	•			•			•	•		•		•	
Recreation Workers		•		•	•	•			•		•							•	•	•	•			
Sales Managers			•	•	•		•		•		•					•				•	•		•	
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																								
Audio and Video Equipment Technicians	•	•		•	•	•					•			•				•			•			•
General and Operations Managers	•	•		•	•				•		•							•		•	•			•
Massage Therapists	•	•			•		•				•							•	•	•	•			•
Skincare Specialists	•	•	•	•	•		•				•							•	•		•			
Sound Engineering Technicians	•	•	•	•	•						•		•					•			•			•
Requires a High School Diploma or Equivalent or Less																								
Combined Food Preparation and Serving Workers, Including Fast Food		•		•	•	•	•	•	•										•	•	•			
Cooks, Fast Food	•	•		•	•		•				•							•	•	•	•			
Cooks, Restaurant	•	•		•	•	•	•				•						•			•	•		•	
Food Preparation Workers		•	•	•	•		•				•							•	•	•	•		•	
Waiters and Waitresses		•		•	•	•	•				•					•		•	•					

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

⁸ Data represent the occupation Accountants, a specialty occupation of Accountants and Auditors.

Related Occupations

The table below lists key occupations in the Hospitality and Tourism cluster by entry-level education requirements, and for each provides a sample of related occupations. With additional preparation, these related occupations match the skills, education, and work experience needed for the key Hospitality and Tourism cluster occupations.

Hospitality and Tourism Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
Meeting, Convention, and Event Planners	<ul style="list-style-type: none"> Advertising and Promotions Managers Human Resources Specialists Public Relations Specialists
Recreation Workers	<ul style="list-style-type: none"> Preschool Teachers, Except Special Education Education Administrators, Preschool and Childcare Center/Program Recreational Therapists
Accountants and Auditors	<ul style="list-style-type: none"> Bookkeeping, Accounting, and Auditing Clerks Financial Analysts Personal Financial Advisors
Curators	<ul style="list-style-type: none"> Library Science Teachers, Postsecondary Archivists Librarians
Sales Managers	<ul style="list-style-type: none"> Marketing Managers Training and Development Managers Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
General and Operations Managers	<ul style="list-style-type: none"> Administrative Services Managers First-Line Supervisors of Office and Administrative Support Workers Logistics Managers
Massage Therapists	<ul style="list-style-type: none"> Hairdressers, Hairstylists, and Cosmetologists Manicurists and Pedicurists Skincare Specialists
Audio and Video Equipment Technicians	<ul style="list-style-type: none"> Audio-Visual and Multimedia Collections Specialists Broadcast Technicians Sound Engineering Technicians
Skincare Specialists	<ul style="list-style-type: none"> Massage Therapists Hairdressers, Hairstylists, and Cosmetologists Manicurists and Pedicurists
Sound Engineering Technicians	<ul style="list-style-type: none"> Audio-Visual and Multimedia Collections Specialists Broadcast Technicians Audio and Video Equipment Technicians
Requires a High School Diploma or Equivalent or Less	
Waiters and Waitresses	<ul style="list-style-type: none"> Dining Room and Cafeteria Attendants and Bartender Helpers Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> Food Preparation Workers Cooks, Short Order Food Servers, Nonrestaurant
Cooks, Fast Food	<ul style="list-style-type: none"> Cooks, Short Order Cooks, Institution and Cafeteria Combined Food Preparation and Serving Workers, Including Fast Food
Cooks, Restaurant	<ul style="list-style-type: none"> Cooks, Short Order Bakers Butchers and Meat Cutters
Food Preparation Workers	<ul style="list-style-type: none"> Dining Room and Cafeteria Attendants and Bartender Helpers Meat, Poultry, and Fish Cutters and Trimmers Cooks, Short Order

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

Employer Demand

The following table lists California employers in the Hospitality and Tourism cluster who posted the most job advertisements during the 120-day period ending April 7, 2014. The table also includes the number of job advertisements from the previous year's period, as well as numerical change and the year-over percent change in these postings for the same 120-day period.

Hospitality and Tourism Cluster Employers	Recent Job Advertisements ¹⁰ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Marriott	2,319	2,685	-366	-13.6%
Pizza Hut	1,757	753	1,004	133.3%
24 Hour Fitness	1,751	826	925	112.0%
Starbucks	1,412	412	1,000	242.7%
Hilton Hotels & Resorts	932	1,001	-69	-6.9%
Hyatt	698	743	-45	-6.1%
Panda Express	601	53	548	1,034.0%
Sprouts	483	73	410	561.6%
The Cheesecake Factory	460	124	336	271.0%
The Ritz-Carlton Hotel Company, L.L.C.	415	20	395	1,975.0%
Sodexo Inc.	411	517	-106	-20.5%
McDonald's Corporation	408	1,148	-740	-64.5%
Vail Resorts	375	566	-191	-33.7%
Gold's Gym	341	57	284	498.2%
TravelMax	338	19	319	1,678.9%
The Walt Disney Company	330	151	179	118.5%
Inverness Hotel	320	0	320	N/A
Chipotle	290	212	78	36.8%
Wyndham Vacation Resorts	271	84	187	222.6%
PANDA RESTAURANT GROUP	270	958	-688	-71.8%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 7, 2014.

¹⁰ Totals do not reflect any anonymous job advertisements employer may have listed.

Instructional Programs for Key Hospitality and Tourism Occupations

The table below identifies instructional programs related to the 10 key occupations in the Hospitality and Tourism cluster. These programs train individuals for occupations throughout many industries and are not limited to the Hospitality and Tourism cluster.

Classification of Instructional Programs	
• 12.0500	Cooking and Related Culinary Arts, General
• 12.0503	Culinary Arts/Chef Training
• 12.0504	Restaurant, Culinary, and Catering Management/Manager
• 12.0507	Food Service, Waiter/Waitress, and Dining Room Management/Manager
• 19.0505	Food Service Systems Administration/Management
Taxonomy of Programs (California Community Colleges Only)	
• 130620	Dietetic Services and Management
• 130630	Culinary Arts
• 130710	Restaurant and Food Services and Management

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

Accredited Institutions and Top Instructional Programs

The table below identifies accredited public and private colleges and universities with the most enrollment in 2011-12. The table also identifies the top five instructional programs, by number of awards/degrees conferred in 2011-12, for the listed institutions.

Accredited College Institutions		Top Five Instructional Programs
California Community Colleges (<i>Associate's Degrees and Certificates Below a Bachelor's</i>)		
<ul style="list-style-type: none"> American River College City College of San Francisco De Anza College Diablo Valley College East Los Angeles College El Camino Community College District Long Beach City College Los Angeles City College Mt. San Antonio College Orange Coast College 	<ul style="list-style-type: none"> Palomar College Pasadena City College Rio Hondo College Sacramento City College Saddleback College San Diego Mesa College Santa Ana College Santa Monica College Santa Rosa Junior College Southwestern College 	<ul style="list-style-type: none"> Liberal Arts and Sciences, General Studies, and Humanities (11,543 Awards) Health Professions and Related Programs (5,946 Awards) Business, Management, Marketing, and Related Support Services (4,329 Awards) Social Sciences (3,894 Awards) Multi/Interdisciplinary Studies (3,785 Awards)
California State Universities (<i>Bachelor's and Master's Degrees, Doctorate's</i>)		
<ul style="list-style-type: none"> California Polytechnic State University-San Luis Obispo California State Polytechnic University-Pomona Chico State CSU Bakersfield CSU Dominguez Hills CSU East Bay CSU Fresno CSU Fullerton CSU Long Beach CSU Los Angeles 	<ul style="list-style-type: none"> CSU Northridge CSU Sacramento CSU San Marcos CSU Stanislaus Humboldt State University San Bernardino State San Diego State San Francisco State San Jose State Sonoma State University 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (18,904 Awards) Social Sciences (8,110 Awards) Health Professions and Related Programs (7,459 Awards) Education (6,351 Awards) Engineering (5,633 Awards)
Universities of California (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> UC Berkeley UC Davis UC Irvine UC Los Angeles UC Merced 	<ul style="list-style-type: none"> UC Riverside UC San Diego UC San Francisco UC Santa Barbara UC Santa Cruz 	<ul style="list-style-type: none"> Social Sciences (11,978 Awards) Biological and Biomedical Sciences (8,835 Awards) Engineering (6,410 Awards) Business, Management, Marketing, and Related Support Services (5,658 Awards) Psychology (5,177 Awards)
Private Universities and Colleges (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> Azusa Pacific University Biola University Brandman University California Baptist University California Lutheran University Chapman University Fresno Pacific University Golden Gate University-San Francisco Loma Linda University Loyola Marymount University 	<ul style="list-style-type: none"> National University Pepperdine University Santa Clara University Stanford University University of La Verne University of Redlands University of San Diego University of San Francisco University of Southern California University of the Pacific 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (12,849 Awards) Education (8,958 Awards) Health Professions and Related Programs (5,516 Awards) Engineering (3,700 Awards) Legal Professions and Studies (3,582 Awards)

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



Occupational Analysis: Retail

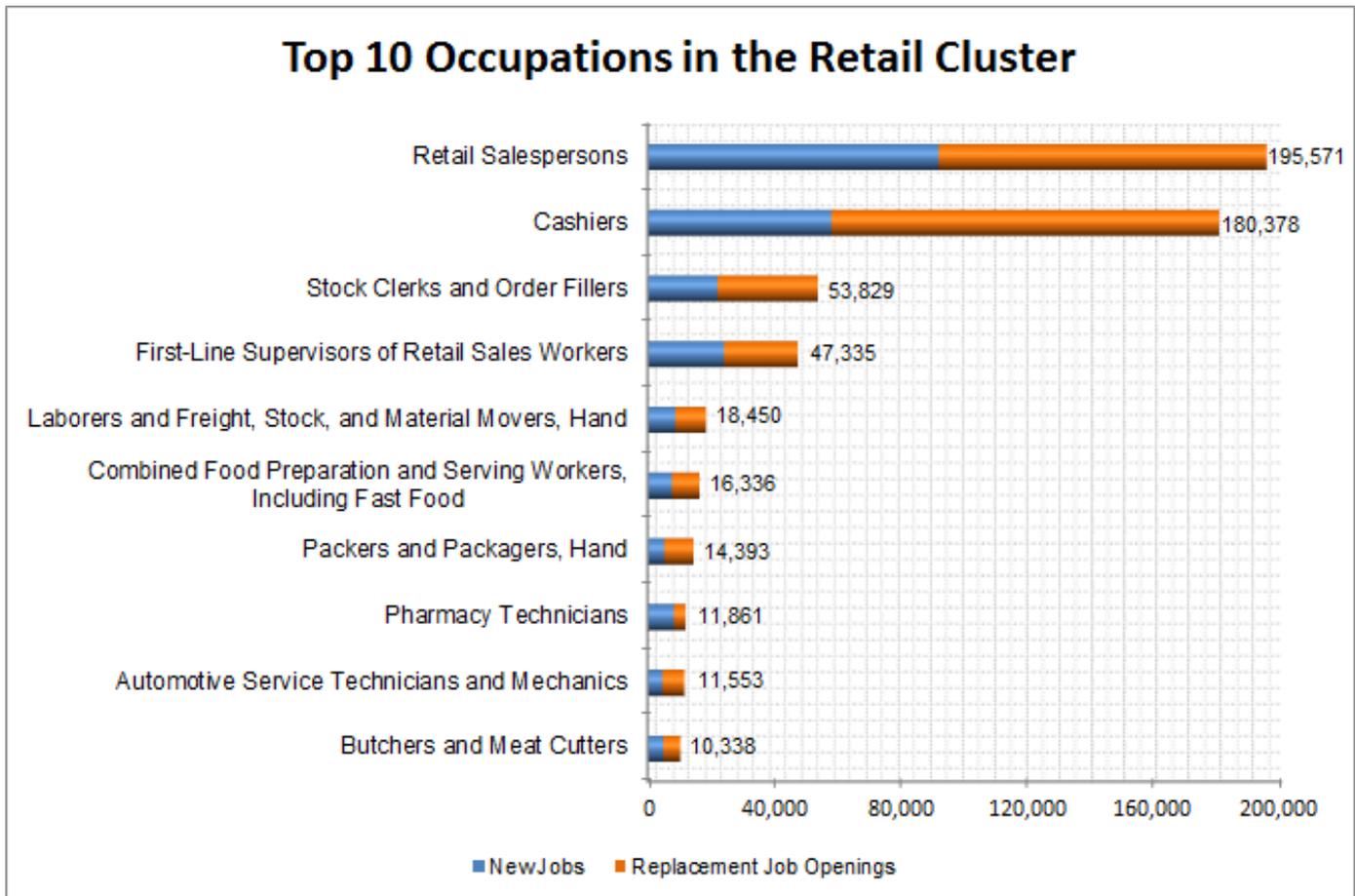
California
April 2014

What is the Retail Cluster?

The Retail cluster is comprised 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.

High-Growth Occupations in Retail

The graph below identifies the top 10 occupations in the Retail cluster, based on statewide new job growth plus replacement openings. In sum, these 10 occupations represent more than three quarters of the 731,000 total job openings projected in this cluster between 2010 and 2020. Moreover, many share the same required skills such as active listening, coordination, critical thinking, monitoring, and reading comprehension.¹¹



Source: California Employment Development Department, *Projections of Employment 2010-2020*.

¹¹ U.S. Department of Labor's Occupational Information Network at www.onetonline.org

High-Growth Occupations and Recent Job Demand in Retail Cluster

The table below further profiles the top 10 occupations in the Retail cluster by listing total job openings for 2010-2020, median annual wage, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California’s online job listing system.

Occupations	Total Job Openings ¹² (2010-2020)	Median Annual Wage (2012)	Entry Level Education ¹³	HWOL Job Advertisements ¹⁴ (120 days)
Retail Salespersons	195,571	\$22,278	Less than high school	31,261
Cashiers	180,378	\$20,725	Less than high school	4,452
Stock Clerks and Order Fillers	53,829	\$23,152	Less than high school	7,498
First-Line Supervisors of Retail Sales Workers	47,335	\$39,860	High school diploma or equivalent	24,997
Laborers and Freight, Stock, and Material Movers, Hand	18,450	\$24,943	Less than high school	3,929
Combined Food Preparation and Serving Workers, Including Fast Food	16,336	\$19,086	Less than high school	7,310
Packers and Packagers, Hand	14,393	\$19,720	Less than high school	384
Pharmacy Technicians	11,861	\$38,285	High school diploma or equivalent	2,126
Automotive Service Technicians and Mechanics	11,553	\$40,392	High school diploma or equivalent	7,509
Butchers and Meat Cutters	10,338	\$28,156	Less than high school	111

Source: California Employment Development Department, *Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012*; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

¹² Total job openings are the sum of new jobs and replacement needs.

¹³ U.S. Department of Labor, Bureau of Labor Statistics (BLS) education levels.

¹⁴ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

Key Occupations by Education Level

The table below identifies key occupations with the most total job openings, categorized by entry-level education requirements, within the Retail cluster. The table includes the statewide projected job openings and median annual wages at the statewide level. Added to these are recent totals of online job advertisements over a recent 120-day period. 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 (2010-2020)	Median Annual Wage (2012)	HWOL Job Advertisements (120 days)
Requires a Bachelor's Degree or Higher			
Pharmacists	8,684	\$130,563	2,358
Sales Managers	6,245	\$109,926	12,956
Cost Estimators	830	\$67,087	1,668
Accountants and Auditors	565	\$69,244	22,798
Graphic Designers	517	\$53,078	6,924
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree			
General and Operations Managers	4,924	\$111,247	8,942
First-Line Supervisors of Production and Operating Workers	1,331	\$55,327	9,406
Computer, Automated Teller, and Office Machine Repairers	884	\$39,877	194
Computer Support Specialists	652	\$55,910	15,740
Hairdressers, Hairstylists, and Cosmetologists	624	\$22,316	4,319
Requires a High School Diploma or Equivalent or Less			
Retail Salespersons	195,571	\$22,278	31,261
Cashiers	180,378	\$20,725	4,452
Stock Clerks and Order Fillers	53,829	\$23,152	7,498
First-Line Supervisors of Retail Sales Workers	47,335	\$39,860	24,997
Laborers and Freight, Stock, and Material Movers, Hand	18,450	\$24,943	3,929

Source: California Employment Development Department, Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

Skill Requirements

The table below lists the top 10 skills required for key Retail cluster occupations. Critical thinking and monitoring are the most commonly shared skills, followed by active listening, reading comprehension, and speaking. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupation	Skills																											
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Equipment Maintenance	Instructing	Judgment and Decision Making	Learning Strategies	Management of Financial Resources	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Operations Analysis	Persuasion	Reading Comprehension	Repairing	Science	Service Orientation	Social Perceptiveness	Speaking	Systems Analysis	Time Management	Troubleshooting	Writing
Requires a Bachelor's Degree or Higher																												
Accountants and Auditor ¹⁵	•	•			•			•				•	•						•					•	•			•
Cost Estimators	•	•	•		•					•		•	•						•					•				•
Graphic Designers	•	•	•		•							•					•		•					•		•		•
Pharmacists	•	•			•		•	•				•							•		•			•				•
Sales Managers			•	•	•			•			•		•					•					•	•		•		
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																												
Computer, Automated Teller, and Office Machine Repairers	•	•		•	•							•			•	•			•	•								•
Computer Support Specialists ¹⁶	•	•		•	•		•					•							•			•		•				•
First-Line Supervisors of Production and Operating Workers		•	•	•	•						•								•				•	•		•		•
General and Operations Managers	•	•		•	•						•		•						•				•	•				•
Hairdressers, Hairstylists, and Cosmetologists	•	•			•		•		•			•						•			•		•	•				
Requires a High School Diploma or Equivalent or Less																												
Cashiers		•		•	•							•							•			•	•	•		•		•
First-Line Supervisors of Retail Sales Workers					•		•				•		•	•				•	•				•	•		•		
Laborers and Freight, Stock, and Material Movers, Hand		•	•	•	•	•						•			•	•			•									•
Retail Salespersons		•		•	•							•	•					•	•			•	•	•				
Stock Clerks and Order Fillers ¹⁷	•	•	•	•	•			•				•							•			•	•					

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

¹⁵ Data represent the occupation Accountants, a specialty occupation of Accountants and Auditors.

¹⁶ Data represent the occupation Computer User Support Specialist, a new classification that replaces Computer Support Specialists.

¹⁷ Data represent the occupation Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Work Activities

The table below lists the top 10 work activities required for key occupations in the Retail cluster. The most common include communicating with supervisors, peers, or subordinates; establishing and maintaining interpersonal relationships; and organizing, planning, and prioritizing work.

Occupation	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	Documenting/Recording Information	Establishing and Maintaining Interpersonal Relationships	Estimating the Quantifiable Characteristics of Products, Events, or Information	Evaluating Information to Determine Compliance with Standards	Getting Information	Guiding, Directing, and Motivating Subordinates	Handling and Moving Objects	Identifying Objects, Actions, and Events	Interacting With Computers	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Operating Vehicles, Mechanized Devices, or Equipment	Organizing, Planning, and Prioritizing Work	Performing Administrative Activities	Performing for or Working Directly with the Public	Performing General Physical Activities	Processing Information	Provide Consultation and Advice to Others	Repairing and Maintaining Electronic Equipment	Repairing and Maintaining Mechanical Equipment	Resolving Conflicts and Negotiating with Others	Scheduling Work and Activities	Selling or Influencing Others	Thinking Creatively	Training and Teaching Others	Updating and Using Relevant Knowledge	
Requires a Bachelor's Degree or Higher																																			
Accountants and Auditors ¹⁸	•			•				•		•	•					•				•	•			•										•	
Cost Estimators	•			•			•		•		•					•				•	•			•	•									•	
Graphic Designers				•	•			•			•					•				•	•			•	•						•	•		•	
Pharmacists	•	•						•		•				•		•				•	•		•	•										•	
Sales Managers			•	•	•		•					•				•				•	•			•					•	•					
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																																			
Computer, Automated Teller, and Office Machine Repairers				•				•						•	•	•				•							•	•					•	•	
Computer Support Specialists ¹⁹				•				•			•			•	•	•				•				•									•	•	
First-Line Supervisors of Production and Operating Workers			•	•	•			•				•	•												•				•	•					
General and Operations Managers				•	•		•		•							•				•	•							•	•					•	•
Hairdressers, Hairstylists, and Cosmetologists	•		•					•			•		•							•	•			•									•	•	
Requires a High School Diploma or Equivalent or Less																																			
Cashiers				•	•			•			•		•			•						•	•					•	•						
First-Line Supervisors of Retail Sales Workers			•	•				•			•		•			•				•	•							•	•						
Laborers and Freight, Stock, and Material Movers, Hand				•	•			•		•			•	•					•	•			•												
Retail Salespersons				•	•			•					•			•				•	•											•	•		•
Stock Clerks and Order Fillers ²⁰				•	•			•					•	•						•	•			•									•	•	

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

¹⁸ Data represent the occupation Accountants, a specialty occupation of Accountants and Auditors.

¹⁹ Data represent the occupation Computer User Support Specialist, a new classification that replaces Computer Support Specialists.

²⁰ Data represent the occupation Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Related Occupations

The table below lists key occupations in the Retail cluster by entry-level education requirements, and for each provides a sample of related occupations. With additional preparation, these related occupations match the skills, education, and work experience needed for the key Retail cluster occupations.

Retail Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
Pharmacists	<ul style="list-style-type: none"> • Medical Scientists, Except Epidemiologists • Health Specialties Teachers, Postsecondary • Nursing Instructors and Teachers, Postsecondary
Sales Managers	<ul style="list-style-type: none"> • Logistics Managers • First-Line Supervisors of Non-Retail Sales Workers • Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Cost Estimators	<ul style="list-style-type: none"> • Financial Analysts • Budget Analysts • Market Research Analysts and Marketing Specialists
Accountants and Auditors	<ul style="list-style-type: none"> • Bookkeeping, Accounting, and Auditing Clerks • Financial Analysts • Personal Financial Advisors
Graphic Designers	<ul style="list-style-type: none"> • Multimedia Artists and Animators • Film and Video Editors • Desktop Publishers
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
General and Operations Managers	<ul style="list-style-type: none"> • Administrative Services Managers • First-Line Supervisors of Office and Administrative Support Workers • Logistics Managers
First-Line Supervisors of Production and Operating Workers	<ul style="list-style-type: none"> • First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand • Aircraft Cargo Handling Supervisors • First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> • Computer User Support Specialists • Electronic Home Entertainment Equipment Installers and Repairers • Home Appliance Repairers
Computer Support Specialists	<ul style="list-style-type: none"> • Web Administrators • Computer Operators • Computer, Automated Teller, and Office Machine Repairers
Hairdressers, Hairstylists, and Cosmetologists	<ul style="list-style-type: none"> • Barbers • Manicurists and Pedicurists • Shampooers
Requires a High School Diploma or Equivalent or Less	
Retail Salespersons	<ul style="list-style-type: none"> • Parts Salespersons • Tellers • Pharmacy Aides
Cashiers	<ul style="list-style-type: none"> • Gaming Change Persons and Booth Cashiers • Stock Clerks, Sales Floor • Counter and Rental Clerks
Stock Clerks and Order Fillers	<ul style="list-style-type: none"> • Shipping, Receiving, and Traffic Clerks • Packers and Packagers, Hand • Cashiers
First-Line Supervisors of Retail Sales Workers	<ul style="list-style-type: none"> • Wholesale and Retail Buyers, Except Farm Products • First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand • Hotel, Motel, and Resort Desk Clerks
Laborers and Freight, Stock, and Material Movers, Hand	<ul style="list-style-type: none"> • Packaging and Filling Machine Operators and Tenders • Industrial Truck and Tractor Operators • Meter Readers, Utilities

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

Employer Demand

The following table lists California employers in the Retail cluster who posted the most job advertisements during the 120-day period ending April 7, 2014. The table also includes the number of job advertisements from the previous year's period, as well as numerical change and the year-over percent change in these postings for the same 120-day period.

Retail Cluster Employers	Recent Job Advertisements ²¹ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Sears Holdings Corporation	2,863	1,481	1,382	93.3%
Apple Inc.	2,726	1,134	1,592	140.4%
Macy's	1,741	1,401	340	24.3%
Lowe's	1,568	1,549	19	1.2%
Amazon.com	1,327	1,232	95	7.7%
Nordstrom	1,167	2,261	-1,094	-48.4%
Whole Foods	1,114	10	1,104	1,1040.0%
DELL	968	555	413	74.4%
CVS Caremark	910	1,851	-941	-50.8%
Best Buy	876	258	618	239.5%
Staples	780	311	469	150.8%
Gap Inc.	776	744	32	4.3%
Firestone	754	84	670	797.6%
Home Depot	748	2,147	-1,399	-65.2%
Toys"R"Us	721	463	258	55.7%
T-Mobile	697	647	50	7.7%
AutoNation	697	611	86	14.1%
Harbor Freight Tools	592	502	90	17.9%
Safeway Companies	572	640	-68	-10.6%
Ross Dress For Less	551	254	297	116.9%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 7, 2014.

²¹ Totals do not reflect any anonymous job advertisements employer may have listed.

Instructional Programs for Key Retail Occupations

The table below identifies instructional programs related to the 10 key occupations in the Retail Cluster. These programs train individuals for occupations throughout many industries and are not limited to the Retail cluster.

Classification of Instructional Programs	
• 01.0608	Floriculture/Floristry Operations and Management
• 12.0506	Meat Cutting/Meat Cutter
• 15.0803	Automotive Engineering Technology/Technician
• 19.0203	Consumer Merchandising/Retailing Management
• 47.0600	Vehicle Maintenance and Repair Technologies, General
• 47.0604	Automobile/Automotive Mechanics Technology/Technician
• 47.0612	Vehicle Emissions Inspection and Maintenance Technology/Technician
• 47.0613	Medium/Heavy Vehicle and Truck Technology/Technician
• 47.0614	Alternative Fuel Vehicle Technology/Technician
• 47.0617	High Performance and Custom Engine Technician/Mechanic
• 51.0805	Pharmacy Technician/Assistant
• 52.0208	E-Commerce/Electronic Commerce
• 52.0212	Retail Management
• 52.1803	Retailing and Retail Operations
• 52.1804	Selling Skills and Sales Operations
• 52.1899	General Merchandising, Sales, and Related Marketing Operations, Other
• 52.1909	Special Products Marketing Operations
Taxonomy of Programs (California Community Colleges Only)	
• 010920	Floriculture /Floristry
• 050650	Retail Store Operations and Management
• 050900	Marketing and Distribution
• 050940	Sales and Salesmanship
• 050970	E-Commerce (business emphasis)
• 059900	Other Business and Management
• 070910	E-Commerce (technology emphasis)
• 094800	Automotive Technology
• 094840	Alternative Fuels and Advanced Transportation Technology
• 122100	Pharmacy Technology

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

Accredited Institutions and Top Instructional Programs

The table below identifies accredited public and private colleges and universities with the most enrollment in 2011-12. The table also identifies the top five instructional programs, by number of awards/degrees conferred in 2011-12, for the listed institutions.

Accredited College Institutions		Top Five Instructional Programs
California Community Colleges (<i>Associate's Degrees and Certificates Below a Bachelor's</i>)		
<ul style="list-style-type: none"> American River College City College of San Francisco De Anza College Diablo Valley College East Los Angeles College El Camino Community College District Long Beach City College Los Angeles City College Mt. San Antonio College Orange Coast College 	<ul style="list-style-type: none"> Palomar College Pasadena City College Rio Hondo College Sacramento City College Saddleback College San Diego Mesa College Santa Ana College Santa Monica College Santa Rosa Junior College Southwestern College 	<ul style="list-style-type: none"> Liberal Arts and Sciences, General Studies, and Humanities (11,543 Awards) Health Professions and Related Programs (5,946 Awards) Business, Management, Marketing, and Related Support Services (4,329 Awards) Social Sciences (3,894 Awards) Multi/Interdisciplinary Studies (3,785 Awards)
California State Universities (<i>Bachelor's and Master's Degrees, Doctorate's</i>)		
<ul style="list-style-type: none"> California Polytechnic State University-San Luis Obispo California State Polytechnic University-Pomona Chico State CSU Bakersfield CSU Dominguez Hills CSU East Bay CSU Fresno CSU Fullerton CSU Long Beach CSU Los Angeles 	<ul style="list-style-type: none"> CSU Northridge CSU Sacramento CSU San Marcos CSU Stanislaus Humboldt State University San Bernardino State San Diego State San Francisco State San Jose State Sonoma State University 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (18,904 Awards) Social Sciences (8,110 Awards) Health Professions and Related Programs (7,459 Awards) Education (6,351 Awards) Engineering (5,633 Awards)
Universities of California (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> UC Berkeley UC Davis UC Irvine UC Los Angeles UC Merced 	<ul style="list-style-type: none"> UC Riverside UC San Diego UC San Francisco UC Santa Barbara UC Santa Cruz 	<ul style="list-style-type: none"> Social Sciences (11,978 Awards) Biological and Biomedical Sciences (8,835 Awards) Engineering (6,410 Awards) Business, Management, Marketing, and Related Support Services (5,658 Awards) Psychology (5,177 Awards)
Private Universities and Colleges (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> Azusa Pacific University Biola University Brandman University California Baptist University California Lutheran University Chapman University Fresno Pacific University Golden Gate University-San Francisco Loma Linda University Loyola Marymount University 	<ul style="list-style-type: none"> National University Pepperdine University Santa Clara University Stanford University University of La Verne University of Redlands University of San Diego University of San Francisco University of Southern California University of the Pacific 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (12,849 Awards) Education (8,958 Awards) Health Professions and Related Programs (5,516 Awards) Engineering (3,700 Awards) Legal Professions and Studies (3,582 Awards)

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



Occupational Analysis: Health Care Services

California

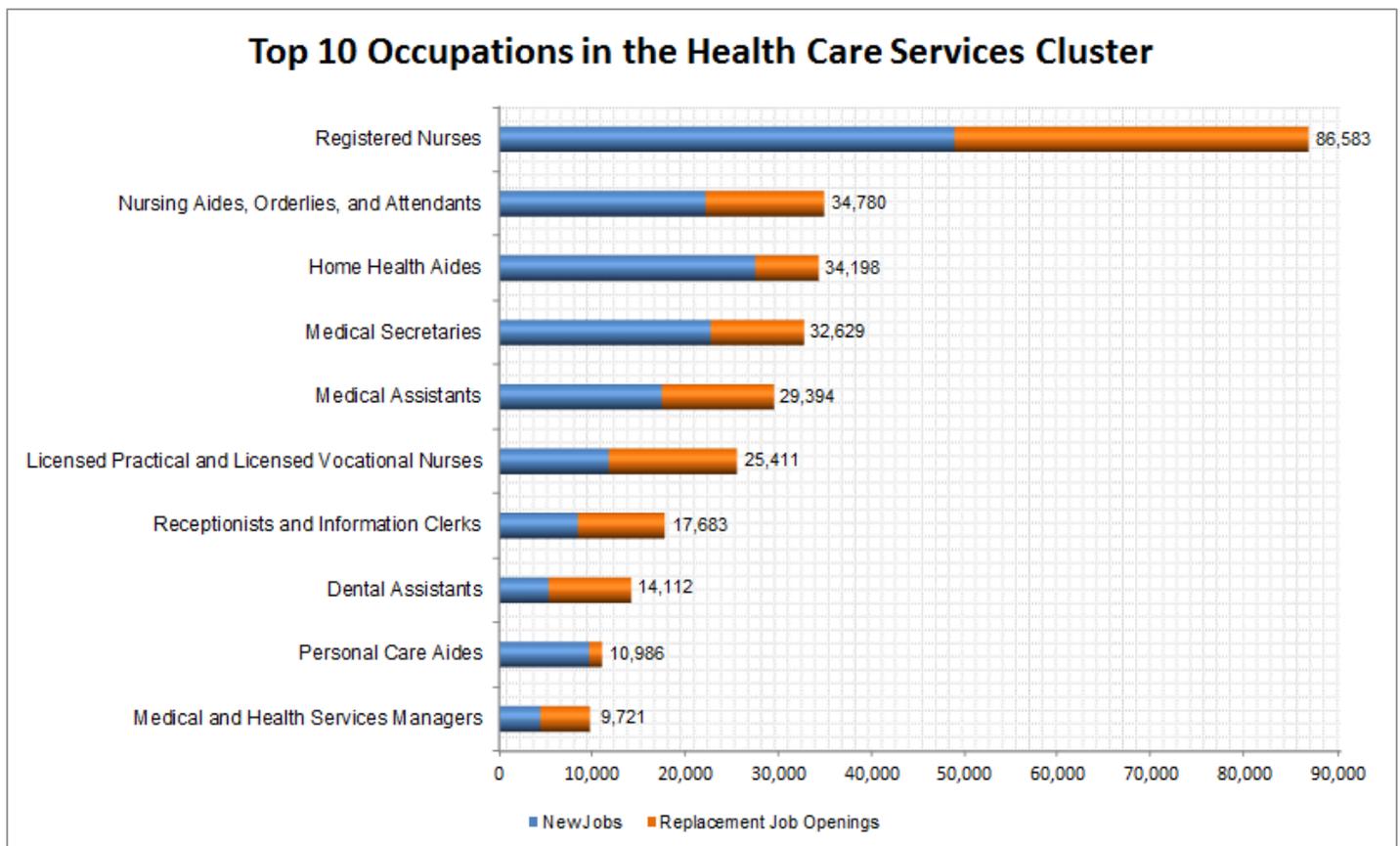
April 2014

What is the Health Care Services Cluster?

The Health Care Services cluster is comprised of 14 industries that include hospitals and doctor's 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.

High-Growth Occupations in Health Care Services

The graph below identifies the top 10 occupations in the Health Care Services cluster, based on statewide new job growth plus replacement openings. In sum, these 10 occupations represent more than half of the 526,000 total job openings projected in this cluster between 2010 and 2020. Moreover, many share the same required skills such as active listening, coordination, critical thinking service orientation, and speaking.²²



Source: California Employment Development Department, Projections of Employment 2010-2020.

²² U.S. Department of Labor's Occupational Information Network at www.onetonline.org

High-Growth Occupations and Recent Job Demand in the Health Care Services Cluster

The table below further profiles the top 10 occupations in the Health Care Services cluster by listing total job openings for 2010-2020, median annual wage, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ²³ (2010-2020)	Median Annual Wage (2012)	Entry Level Education ²⁴	HWOL Job Advertisements ²⁵ (120 days)
Registered Nurses	86,583	\$89,577	Associate's degree	46,921
Nursing Aides, Orderlies, and Attendants	34,780	\$27,898	Postsecondary non-degree award	3,289
Home Health Aides	34,198	\$21,712	Less than high school	4,839
Medical Secretaries	32,629	\$34,480	High school diploma or equivalent	9,859
Medical Assistants	29,394	\$31,586	High school diploma or equivalent	7,066
Licensed Practical and Licensed Vocational Nurses	25,411	\$51,760	Postsecondary non-degree award	5,462
Receptionists and Information Clerks	17,683	\$28,210	High school diploma or equivalent	8,986
Dental Assistants	14,112	\$35,516	Postsecondary non-degree award	5,629
Personal Care Aides	10,986	\$21,510	Less than high school	8,590
Medical and Health Services Managers	9,721	\$101,695	Bachelor's degree	10,768

Source: California Employment Development Department, Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

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

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

²⁵ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

Key Occupations by Education Level

The table below identifies key occupations with the most total job openings, categorized by entry-level education requirements, within the Health Care Services cluster. The table includes the statewide projected job openings and median annual wages at the statewide level. Added to this are recent totals of online job advertisements over a recent 120-day period. 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 (2010-2020)	Median Annual Wage (2012)	HWOL Job Advertisements (120 days)
Requires a Bachelor's Degree or Higher			
Medical and Health Services Managers	9,721	\$101,695	10,768
Physical Therapists	5,134	\$87,194	6,133
Healthcare Social Workers	4,550	\$60,777	1,423
Marriage and Family Therapists	4,520	\$46,311	681
Family and General Practitioners	4,079	\$167,470	2,280
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree			
Registered Nurses	86,583	\$89,577	46,921
Nursing Aides, Orderlies, and Attendants	34,780	\$27,898	3,289
Licensed Practical and Licensed Vocational Nurses	25,411	\$51,760	5,462
Dental Assistants	14,112	\$35,516	5,629
Emergency Medical Technicians and Paramedics	9,186	\$31,578	911
Requires a High School Diploma or Equivalent or Less			
Home Health Aides	34,198	\$21,712	4,839
Medical Secretaries	32,629	\$34,480	9,859
Medical Assistants	29,394	\$31,586	7,066
Receptionists and Information Clerks	17,683	\$28,210	8,986
Personal Care Aides	10,986	\$21,510	8,590

Source: California Employment Development Department, Projections of Employment 2010-2020; Occupational Employment Statistics Wage Survey, 1st Q, 2012; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 7, 2014.

Skill Requirements

The table below lists the top 10 skills required for key Health Care Services cluster occupations. Active listening, critical thinking, and speaking are the most commonly shared skills, followed by reading comprehension and social perceptiveness. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupation	Skills																
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Instructing	Judgment and Decision Making	Management of Personnel Resources	Monitoring	Operations Analysis	Reading Comprehension	Science	Service Orientation	Social Perceptiveness	Speaking	Time Management	Writing
Requires a Bachelor's Degree or Higher																	
Family and General Practitioners	•	•	•		•		•				•	•		•	•		•
Healthcare Social Workers		•		•	•		•		•		•		•	•	•		•
Marriage and Family Therapists	•	•	•		•		•		•		•		•	•	•		
Medical and Health Services Managers		•		•	•		•	•	•	•					•	•	
Physical Therapists		•		•	•	•	•				•		•	•	•		•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																	
Dental Assistants	•	•			•	•			•		•		•	•	•		•
Emergency Medical Technicians and Paramedics	•	•		•	•		•		•		•		•	•	•		
Licensed Practical and Licensed Vocational Nurses		•		•	•		•		•		•		•	•	•	•	
Nursing Aides, Orderlies, and Attendants ²⁶	•	•		•	•				•		•		•	•	•		•
Registered Nurses	•	•		•	•	•			•		•		•	•	•		
Requires a High School Diploma or Equivalent or Less																	
Home Health Aides	•	•		•	•	•	•		•				•	•	•		
Medical Assistants	•	•		•	•				•		•		•	•	•		•
Medical Secretaries		•	•	•	•						•		•	•	•	•	•
Personal Care Aides	•	•		•	•				•		•		•	•	•		•
Receptionists and Information Clerks		•	•	•	•				•		•		•	•	•		•

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

²⁶ Data represent the occupation Nursing Assistants, a new classification that replaces Nursing Aides, Orderlies, and Attendants.

Work Activities

The table below lists the top 10 work activities required for key occupations in the Health Care Services cluster. The most common include assisting and caring for others; establishing and maintaining interpersonal relationships; and making decisions and solving problems.

Occupation	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	Interpreting the Meaning of Information for Others	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	Performing General Physical Activities	Processing Information	Provide Consultation and Advice to Others	Resolving Conflicts and Negotiating with Others	Thinking Creatively	Training and Teaching Others	Updating and Using Relevant Knowledge
Requires a Bachelor's Degree or Higher																											
Family and General Practitioners	•	•					•	•		•			•		•	•						•					•
Healthcare Social Workers		•		•	•		•	•		•					•	•		•						•			•
Marriage and Family Therapists		•	•				•	•					•		•	•		•		•				•	•		
Medical and Health Services Managers			•		•	•		•			•				•	•		•					•				
Physical Therapists		•					•	•			•	•		•	•					•					•		•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																											
Dental Assistants		•					•	•	•		•	•		•	•		•										•
Emergency Medical Technicians and Paramedics		•					•	•			•			•	•					•	•					•	•
Licensed Practical and Licensed Vocational Nurses		•			•		•	•			•	•		•	•		•										•
Nursing Aides, Orderlies, and Attendants ²⁷		•			•		•	•		•	•		•	•		•		•				•					
Registered Nurses		•			•		•	•		•	•		•	•		•		•				•					•
Requires a High School Diploma or Equivalent or Less																											
Home Health Aides		•			•		•	•		•	•		•	•		•		•									
Medical Assistants		•			•		•	•		•	•		•	•		•		•		•							•
Medical Secretaries		•		•	•		•	•		•	•		•	•		•		•				•					•
Personal Care Aides		•			•		•	•		•	•		•	•		•		•				•					•
Receptionists and Information Clerks		•		•	•		•	•		•	•		•	•		•		•	•	•							•

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

²⁷ Data represent the occupation Nursing Assistants, a new classification that replaces Nursing Aides, Orderlies, and Attendants.

Related Occupations

The table below lists key occupations in the Health Care Services cluster by entry-level education requirements, and for each provides a sample of related occupations. With additional preparation, these related occupations match the skills, education, and work experience needed for the key Health Care Services cluster occupations.

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 Management Analysts Purchasing Managers
Physical Therapists	<ul style="list-style-type: none"> Health Specialties Teachers, Postsecondary Nursing Instructors and Teachers, Postsecondary Occupational Therapists
Healthcare Social Workers	<ul style="list-style-type: none"> Substance Abuse and Behavioral Disorder Counselors Mental Health and Substance Abuse Social Workers Marriage and Family Therapists
Marriage and Family Therapists	<ul style="list-style-type: none"> Child, Family, and School Social Workers Mental Health Counselors Counseling Psychologists
Family and General Practitioners	<ul style="list-style-type: none"> Health Specialties Teachers, Postsecondary Preventive Medicine Physicians Nurse Midwives
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Registered Nurses	<ul style="list-style-type: none"> Cardiovascular Technologists and Technicians Respiratory Therapists Surgical Technologists
Nursing Aides, Orderlies, and Attendants ²⁸	N/A
Licensed Practical and Licensed Vocational Nurses	<ul style="list-style-type: none"> Physical Therapist Assistants Radiologic Technicians Acute Care Nurses
Dental Assistants	<ul style="list-style-type: none"> Dental Hygienists Medical Assistants Veterinary Technologists and Technicians
Emergency Medical Technicians and Paramedics	<ul style="list-style-type: none"> Municipal Firefighters Occupational Health and Safety Technicians Sheriffs and Deputy Sheriffs
Requires a High School Diploma or Equivalent or Less	
Home Health Aides	<ul style="list-style-type: none"> Childcare Workers Medical Assistants Physical Therapist Aides
Medical Secretaries	<ul style="list-style-type: none"> Bill and Account Collectors Hotel, Motel, and Resort Desk Clerks Medical Records and Health Information Technicians
Medical Assistants	<ul style="list-style-type: none"> Social and Human Service Assistants Pharmacy Technicians Occupational Therapy Assistants
Receptionists and Information Clerks	<ul style="list-style-type: none"> Customer Service Representatives Office Clerks, General Insurance Claims Clerks
Personal Care Aides	<ul style="list-style-type: none"> Occupational Therapy Aides Ambulance Drivers and Attendants, Except Emergency Medical Technicians Teacher Assistants

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

²⁸ Currently no related occupations reported by O*NET.

Employer Demand

The following table lists California employers in the Health Care Services cluster who posted the most job advertisements during the 120-day period ending April 7, 2014. The table also includes the number of job advertisements from the previous year's period, as well as numerical change and the year-over percent change in these postings for the same 120-day period.

Health Care Services 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)
Sutter Health	4,668	5,135	-467	-9.1%
DIGNITY HEALTH	4,255	3,812	443	11.6%
Kaiser Permanente	3,266	3,051	215	7.0%
Quest Diagnostics	968	1,425	-457	-32.1%
Tenet Healthcare Corporation	918	819	99	12.1%
Providence Health & Services	895	1,164	-269	-23.1%
DaVita, Inc.	809	946	-137	-14.5%
Aureus Medical	557	1,174	-617	-52.6%
Onward Healthcare	513	571	-58	-10.2%
Fresenius Medical Care	511	769	-258	-33.6%
Pacific Dental Services, Inc.	439	398	41	10.3%
All's Well Health Care Services	408	123	285	231.7%
Sharp HealthCare	396	1,220	-824	-67.5%
Laboratory Corporation of America	387	346	41	11.8%
HealthPartners	386	360	26	7.2%
HCA - The Healthcare Company	384	313	71	22.7%
City Of Hope	353	414	-61	-14.7%
Planned Parenthood	353	394	-41	-10.4%
Emeritus Senior Living	353	314	39	12.4%
Brookdale Senior Living	344	339	5	1.5%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 7, 2014.

²⁹ Totals do not reflect any anonymous job advertisements employer may have listed.

Instructional Programs for Key Health Care Services Occupations

The table below identifies instructional programs related to the 10 key occupations in the Health Care Services Cluster. These programs train individuals for occupations throughout many industries and are not limited to the Health Care Services cluster.

Classification of Instructional Programs	
• 44.0503 Health Policy Analysis	• 51.3803 Adult Health Nurse/Nursing
• 51.0601 Dental Assisting/Assistant	• 51.3805 Family Practice Nurse/Nursing
• 51.0701 Health/Health Care Administration/Management	• 51.3806 Maternal/Child Health and Neonatal Nurse/Nursing
• 51.0702 Hospital and Health Care Facilities Administration/Management	• 51.3808 Nursing Science
• 51.0704 Health Unit Manager/Ward Supervisor	• 51.3809 Pediatric Nurse/Nursing
• 51.0706 Health Information/Medical Records Administration/Administrator	• 51.3810 Psychiatric/Mental Health Nurse/Nursing
• 51.0710 Medical Office Assistant/Specialist	• 51.3811 Public Health/Community Nurse/Nursing
• 51.0712 Medical Reception/Receptionist	• 51.3812 Perioperative/Operating Room and Surgical Nurse/Nursing
• 51.0713 Medical Insurance Coding Specialist/Coder	• 51.3813 Clinical Nurse Specialist
• 51.0714 Medical Insurance Specialist/Medical Biller	• 51.3814 Critical Care Nursing
• 51.0716 Medical Administrative/Executive Assistant and Medical Secretary	• 51.3815 Occupational and Environmental Health Nursing
• 51.0718 Long Term Care Administration/Management	• 51.3816 Emergency Room/Trauma Nursing
• 51.0719 Clinical Research Coordinator	• 51.3818 Nursing Practice
• 51.0801 Medical/Clinical Assistant	• 51.3819 Palliative Care Nursing
• 51.0809 Anesthesiologist Assistant	• 51.3820 Clinical Nurse Leader
• 51.0813 Chiropractic Assistant/Technician	• 51.3821 Geriatric Nurse/Nursing
• 51.2201 Public Health, General	• 51.3822 Women's Health Nurse/Nursing
• 51.2208 Community Health and Preventive Medicine	• 51.3899 Registered Nursing, Nursing Administration, Nursing Research and Clinical Nursing, Other
• 51.2211 Health Services Administration	• 51.3901 Licensed Practical/Vocational Nurse Training
• 51.2601 Health Aide	• 51.3902 Nursing Assistant/Aide and Patient Care Assistant/Aide
• 51.2602 Home Health Aide/Home Attendant	• 51.3999 Practical Nursing, Vocational Nursing and Nursing Assistants, Other
• 51.3801 Registered Nursing/Registered Nurse	• 52.0406 Receptionist
• 51.3802 Nursing Administration	
Taxonomy of Programs (California Community Colleges Only)	
• 051420 Medical Office Technology	• 123010 Registered Nursing
• 120200 Hospital and Health Care Administration	• 123020 Licensed Vocational Nursing
• 120830 Health Facility Unit Coordinator	• 123030 Certified Nurse Assistant
• 120900 Hospital Central Service Technician	• 124010 Dental Assistant
• 123000 Nursing	• 126100 Community Health Care Worker

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

Accredited Institutions and Top Instructional Programs

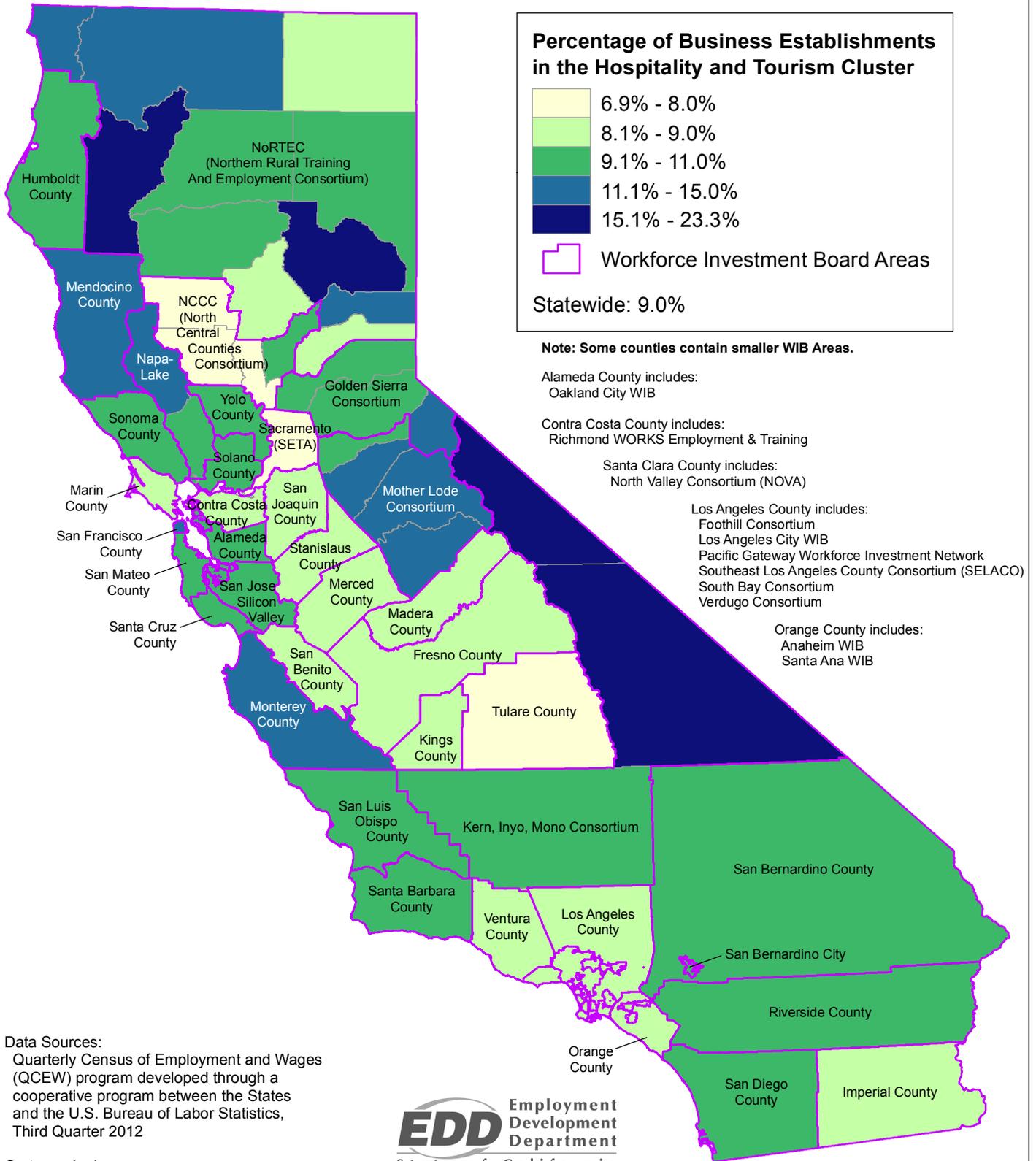
The table below identifies accredited public and private colleges and universities with the most enrollment in 2011-12. The table also identifies the top five instructional programs, by number of awards/degrees conferred in 2011-12, for the listed institutions.

Accredited College Institutions		Top Five Instructional Programs
California Community Colleges (<i>Associate's Degrees and Certificates Below a Bachelor's</i>)		
<ul style="list-style-type: none"> American River College City College of San Francisco De Anza College Diablo Valley College East Los Angeles College El Camino Community College District Long Beach City College Los Angeles City College Mt. San Antonio College Orange Coast College 	<ul style="list-style-type: none"> Palomar College Pasadena City College Rio Hondo College Sacramento City College Saddleback College San Diego Mesa College Santa Ana College Santa Monica College Santa Rosa Junior College Southwestern College 	<ul style="list-style-type: none"> Liberal Arts and Sciences, General Studies, and Humanities (11,543 Awards) Health Professions and Related Programs (5,946 Awards) Business, Management, Marketing, and Related Support Services (4,329 Awards) Social Sciences (3,894 Awards) Multi/Interdisciplinary Studies (3,785 Awards)
California State Universities (<i>Bachelor's and Master's Degrees, Doctorate's</i>)		
<ul style="list-style-type: none"> California Polytechnic State University-San Luis Obispo California State Polytechnic University-Pomona Chico State CSU Bakersfield CSU Dominguez Hills CSU East Bay CSU Fresno CSU Fullerton CSU Long Beach CSU Los Angeles 	<ul style="list-style-type: none"> CSU Northridge CSU Sacramento CSU San Marcos CSU Stanislaus Humboldt State University San Bernardino State San Diego State San Francisco State San Jose State Sonoma State University 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (18,904 Awards) Social Sciences (8,110 Awards) Health Professions and Related Programs (7,459 Awards) Education (6,351 Awards) Engineering (5,633 Awards)
Universities of California (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> UC Berkeley UC Davis UC Irvine UC Los Angeles UC Merced 	<ul style="list-style-type: none"> UC Riverside UC San Diego UC San Francisco UC Santa Barbara UC Santa Cruz 	<ul style="list-style-type: none"> Social Sciences (11,978 Awards) Biological and Biomedical Sciences (8,835 Awards) Engineering (6,410 Awards) Business, Management, Marketing, and Related Support Services (5,658 Awards) Psychology (5,177 Awards)
Private Universities and Colleges (<i>Bachelor's and Master's Degrees, Certificates above a Bachelor's, Doctorate's</i>)		
<ul style="list-style-type: none"> Azusa Pacific University Biola University Brandman University California Baptist University California Lutheran University Chapman University Fresno Pacific University Golden Gate University-San Francisco Loma Linda University Loyola Marymount University 	<ul style="list-style-type: none"> National University Pepperdine University Santa Clara University Stanford University University of La Verne University of Redlands University of San Diego University of San Francisco University of Southern California University of the Pacific 	<ul style="list-style-type: none"> Business, Management, Marketing, and Related Support Services (12,849 Awards) Education (8,958 Awards) Health Professions and Related Programs (5,516 Awards) Engineering (3,700 Awards) Legal Professions and Studies (3,582 Awards)

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

California Hospitality and Tourism Cluster

Percentage of Total County Establishments, 2012

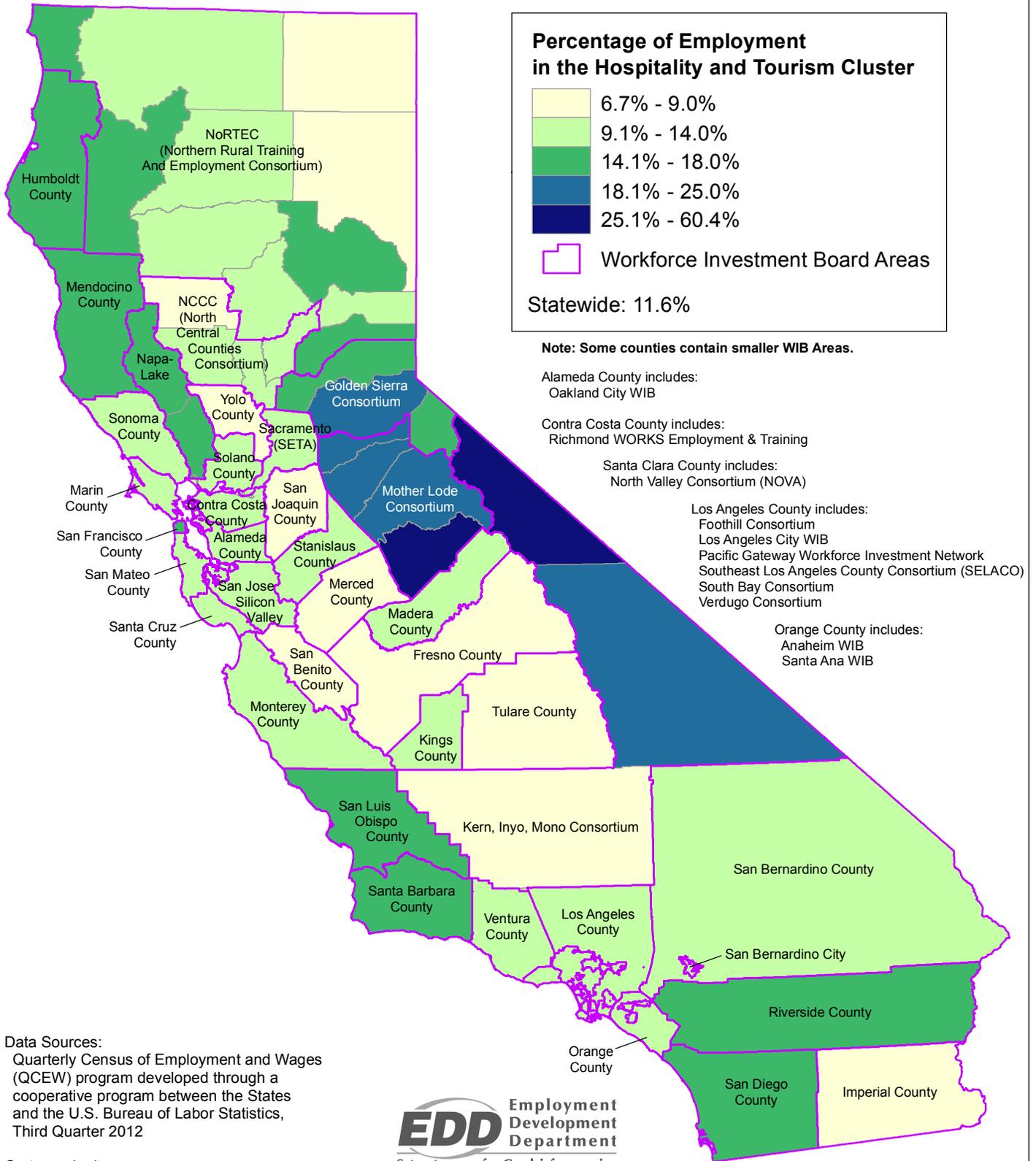


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California Hospitality and Tourism Cluster

Percentage of Total County Employment, 2012



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 2012

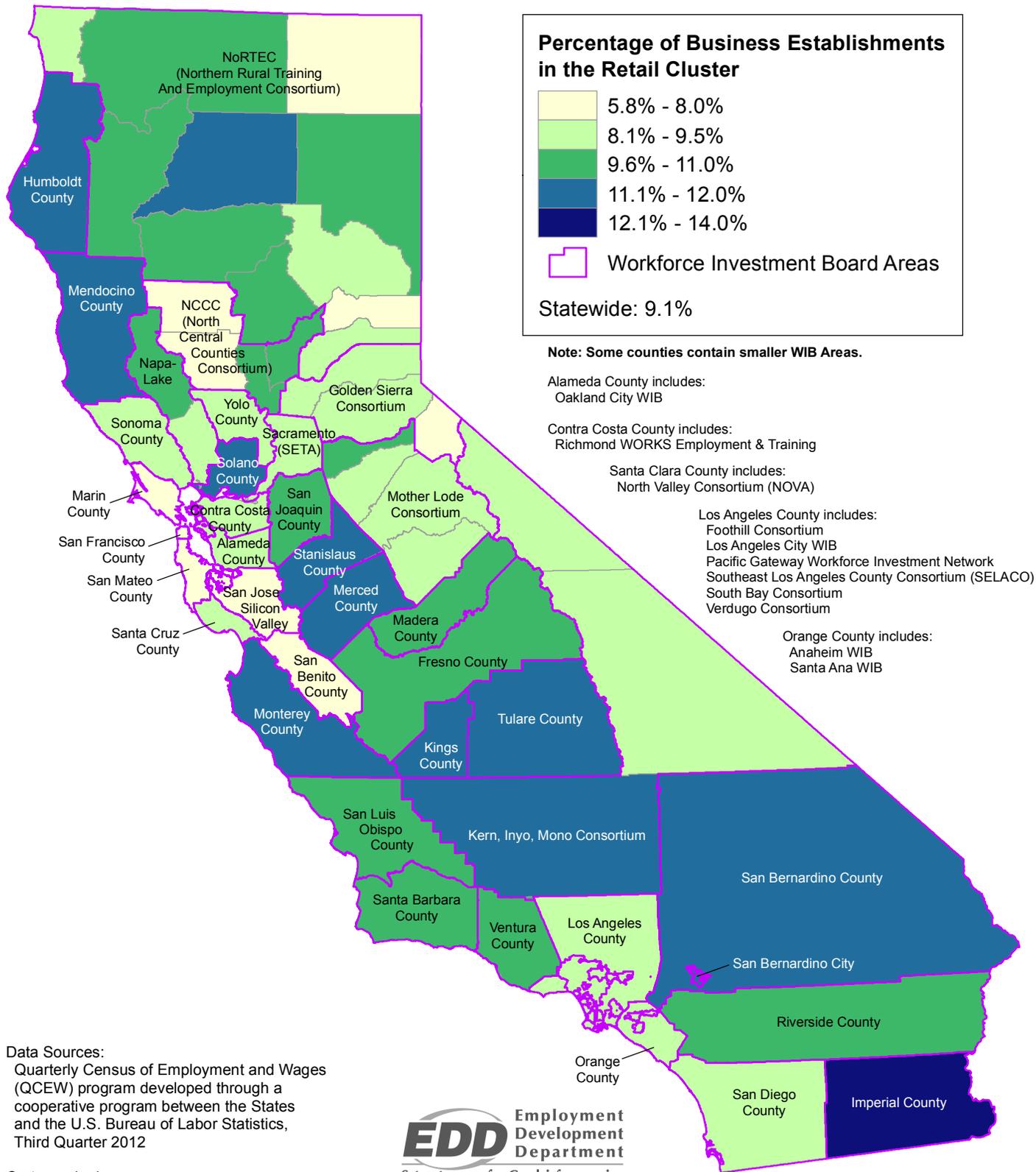
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California Retail Cluster

Percentage of Total County Establishments, 2012



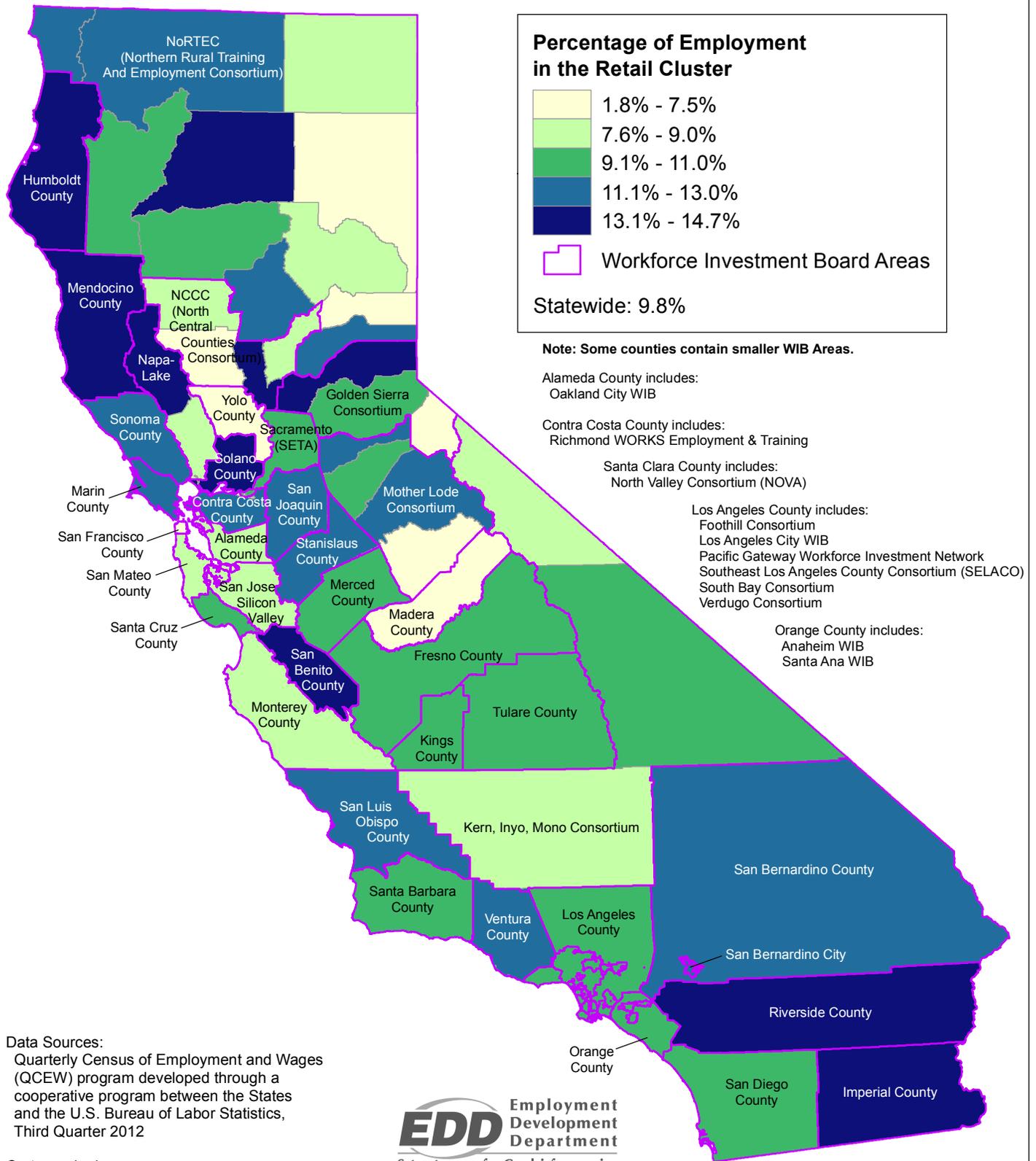
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California Retail Cluster

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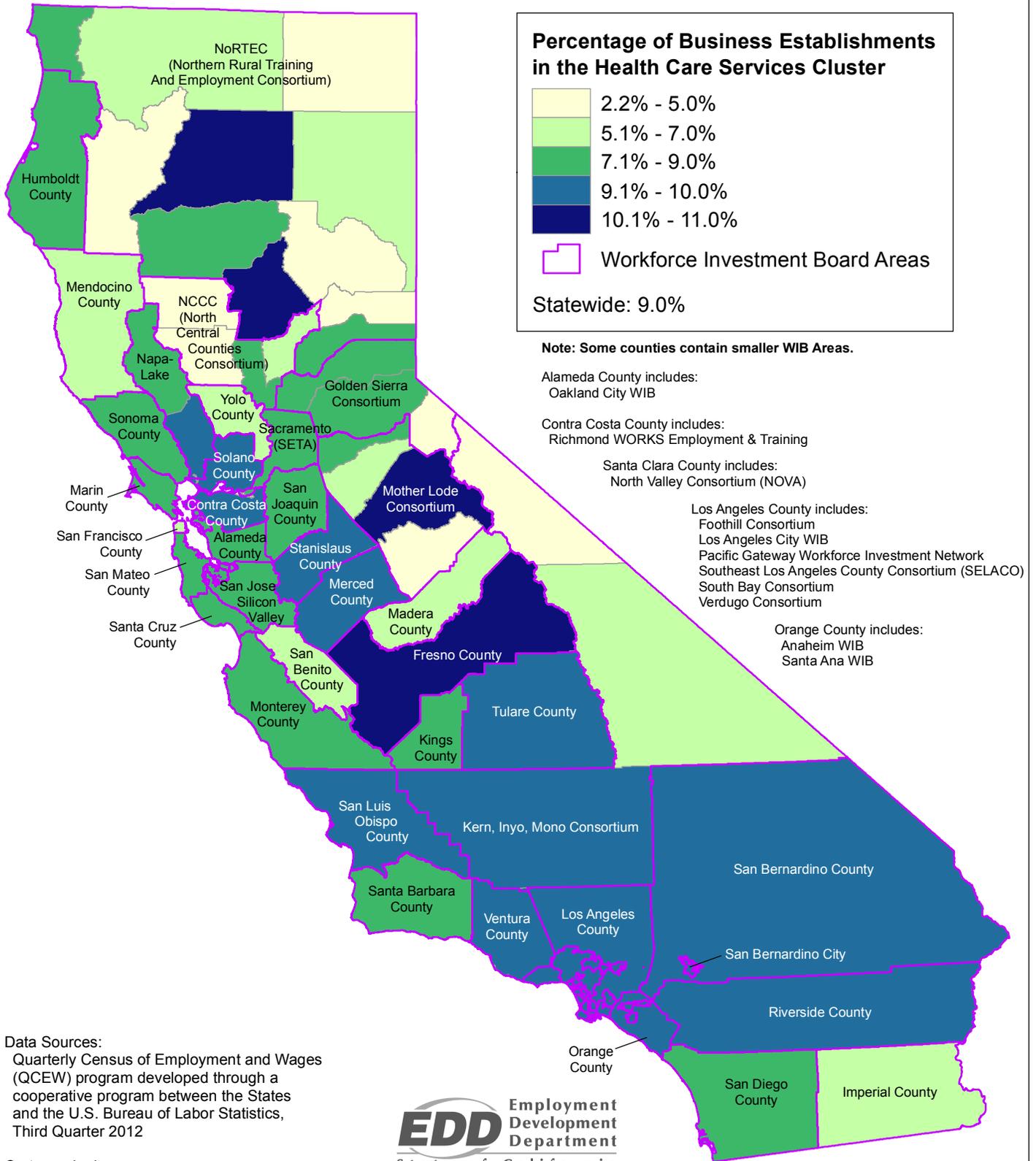
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California Health Care Services Cluster

Percentage of Total County Establishments, 2012



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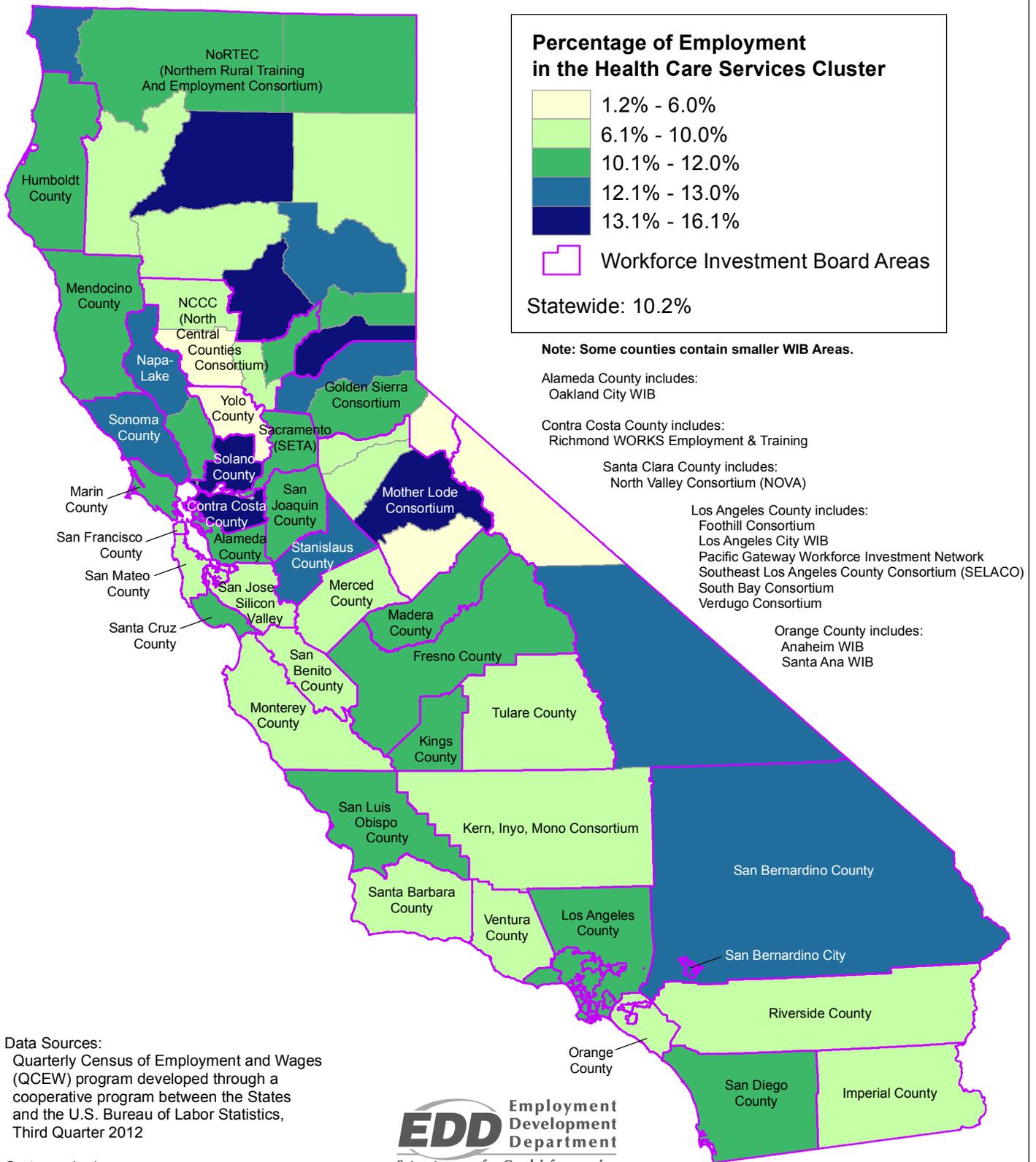
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California Health Care Services Cluster

Percentage of Total County Employment, 2012



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