

Industry Profile: Fashion

San Diego County

May 2019

INTRODUCTION

The Centers of Excellence for Labor Market Research (COE) across the state provide Labor Market Information (LMI) for the California Community Colleges to make informed decisions about program development. In the past program year, the COE received more than 10 requests for fashion-related programs and published LMI accordingly.¹ The resulting studies focus on *Fashion Occupations for Fashion Design, Fashion Merchandising, Fashion Production* programs, with an emphasis on *Apparel Product Development and Technical Design; Dressmaking and Alterations; Costume Design; and Fashion Merchandise, Pattern Making and Product Development for the Apparel Industries*.

This report is intended to supplement those studies with an overview of the fashion industry, including top industry segments, businesses, and occupations in San Diego County.

DEFINING THE FASHION INDUSTRY

For the purpose of this report, the *fashion industry* is defined by the following North American Industrial Classification System (NAICS) codes (Exhibit 1). NAICS is used to classify companies based on their primary business activities or processes of production.² The codes used in this report define the fashion industry in a manner relevant to the California Community Colleges, but differ from those that commonly represent the fashion industry as a whole. The information, exhibits, and analyses in this brief will be based on these industry codes. These industry codes are later referred in the report as “industry segments.”

Exhibit 1: San Diego County's Fashion Industry by NAICS Codes

NAICS Code	NAICS Title	NAICS Code	NAICS Title
313110	Fiber, Yarn, and Thread Mills	424320	Men's and Boys' Clothing and Furnishings Merchant Wholesalers
313210	Broadwoven Fabric Mills	424330	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers
313220	Narrow Fabric Mills and Schiffli Machine Embroidery	424340	Footwear Merchant Wholesalers
313240	Knit Fabric Mills	448110	Men's Clothing Stores
313310	Textile and Fabric Finishing Mills	448120	Women's Clothing Stores
313320	Fabric Coating Mills	448130	Children's and Infants' Clothing Stores
314999	All Other Miscellaneous Textile Product Mills	448140	Family Clothing Stores
315110	Hosiery and Sock Mills	448150	Clothing Accessories Stores
315190	Other Apparel Knitting Mills	448190	Other Clothing Stores

¹ Previous studies can be found on the COE website at coecc.net.

² “North American Classification System,” United States Census Bureau, census.gov/eos/www/naics.

NAICS Code	NAICS Title	NAICS Code	NAICS Title
315210	Cut and Sew Apparel Contractors	453310	Used Merchandise Stores
315220	Men's and Boys' Cut and Sew Apparel Manufacturing	454390	Other Direct Selling Establishments
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing	511199	All Other Publishers
315280	Other Cut and Sew Apparel Manufacturing	532281	Formal Wear and Costume Rental
315990	Apparel Accessories and Other Apparel Manufacturing	541490	Other Specialized Design Services
316998	All Other Leather Good and Allied Product Manufacturing	561920	Convention and Trade Show Organizers
323111	Commercial Printing (except Screen and Books)	711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
323113	Commercial Screen Printing	711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
339993	Fastener, Button, Needle, and Pin Manufacturing	711510	Independent Artists, Writers, and Performers
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers	811490	Other Personal and Household Goods Repair and Maintenance

Important Disclaimers

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. This study examines the most recent data available at the time of the analysis; however, data sets are updated regularly and may not be consistent with previous reports. Efforts have been made to qualify and validate the accuracy of the data and the report findings; however, neither the Centers of Excellence for Labor Market Research (COE), COE host district, nor California Community Colleges Chancellor's Office are responsible for the applications or decisions made by individuals and/or organizations based on this study or its recommendations.

Prepared by:

Tina Ngo Bartel, Director

John Edwards, Research Analyst

San Diego-Imperial Center of Excellence for Labor Market Research

tingobartel@miracosta.edu

jedwards@miracosta.edu



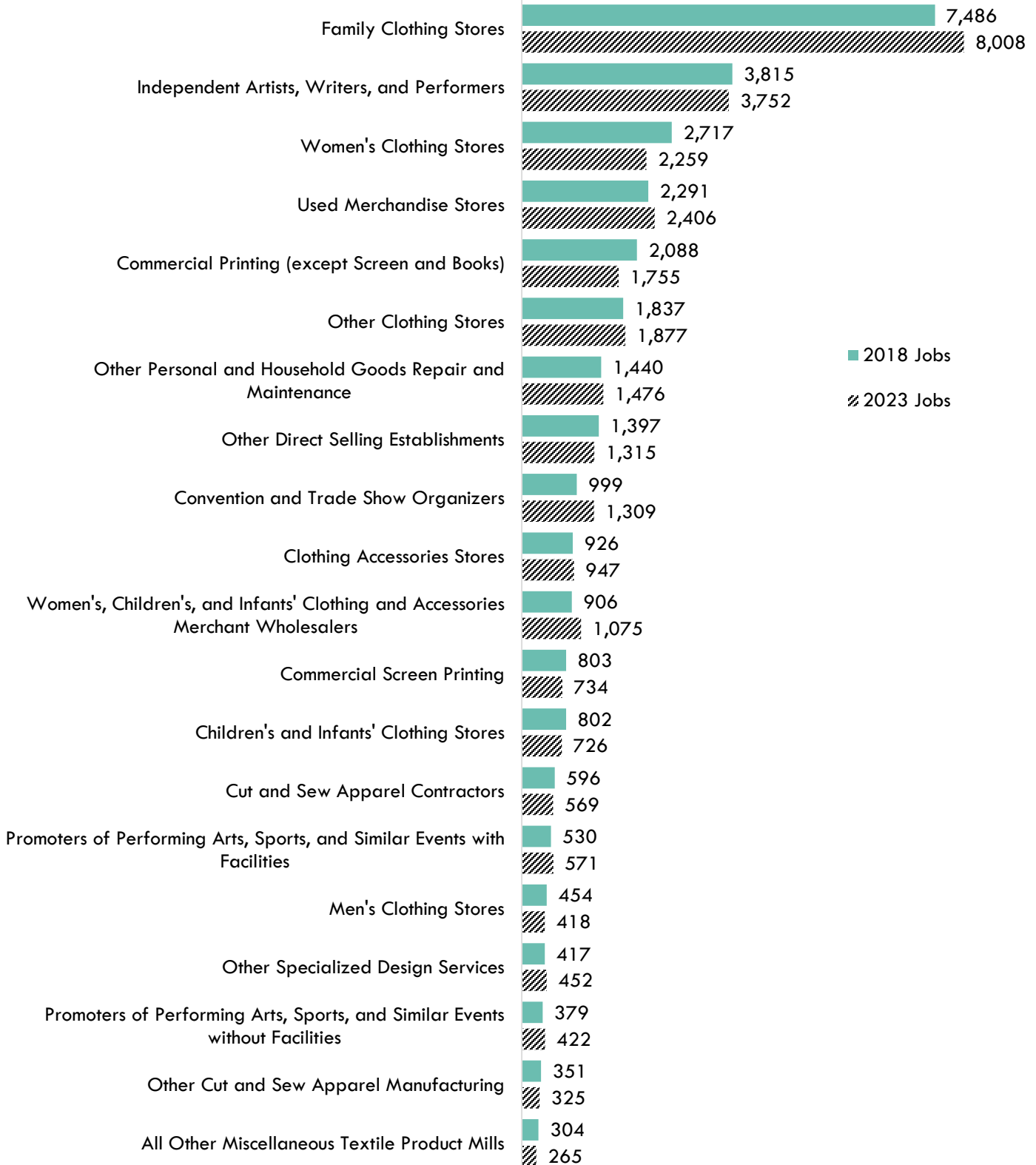
Data Sources

The data presented in this report was derived from Emsi's Analyst program. The dataset is 2019.01.

INDUSTRY SEGMENTS

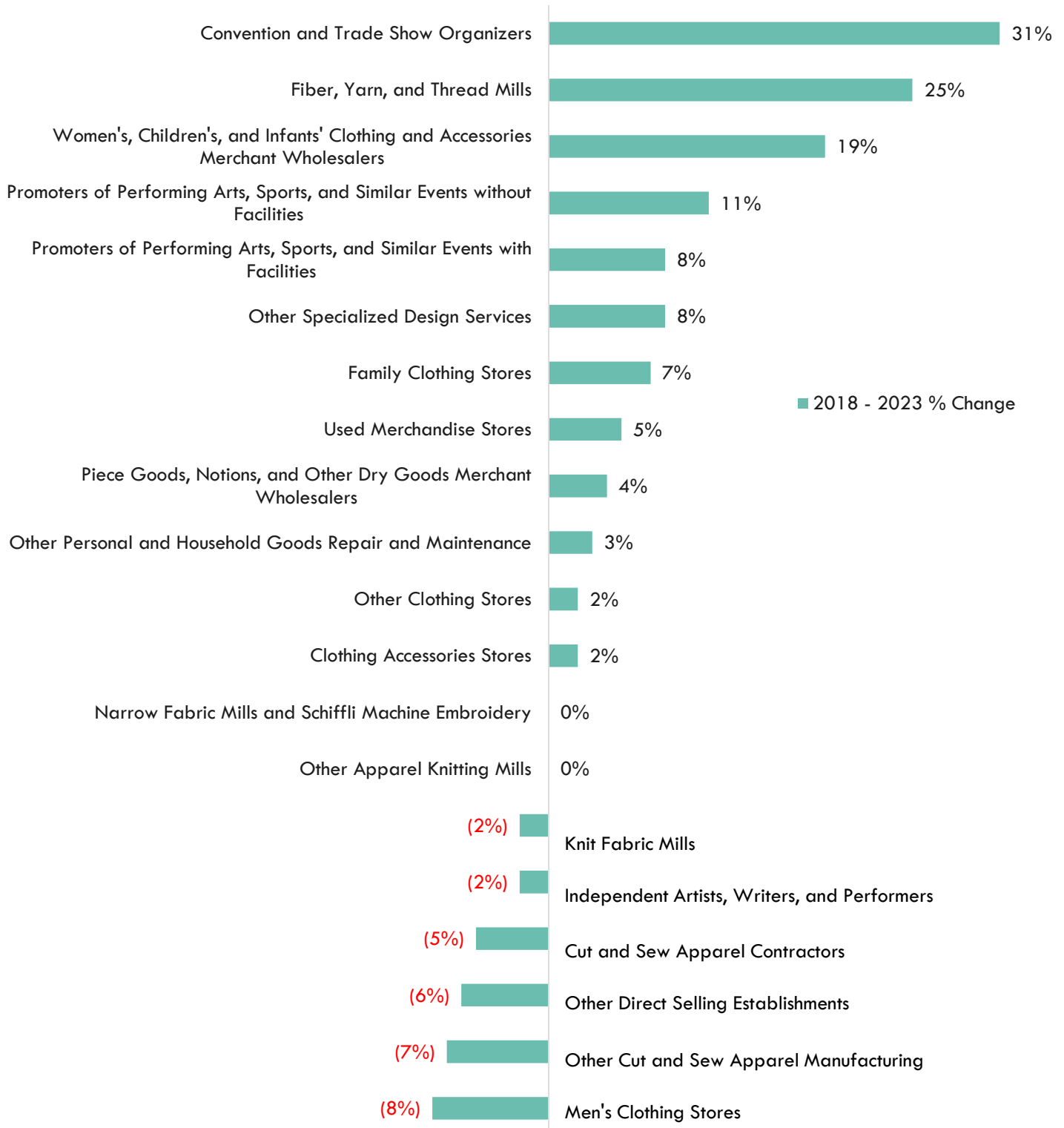
The top industry segments in San Diego County with the greatest number of jobs in 2018 were Family Clothing Stores; Independent Artists, Writers, and Performers; Women's Clothing Stores; Used Merchandise Stores; and Commercial Printing (Exhibit 2).

Exhibit 2: Number of Jobs by Industry Segment in San Diego County, 2018-2023



Between 2018 and 2023, the industry segments projected to have the greatest job growth are Convention and Trade Show Organizers; Fiber, Yarn, and Thread Mills; Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers; Promoters of Performing Arts, Sports, and Similar Events without Facilities; and Promoters of Performing Arts, Sports, and Similar Events with Facilities (Exhibit 3).

Exhibit 3: Projected Percentage Change of Jobs by Industry in San Diego County, 2018-2023



BUSINESSES

Businesses in the fashion industry posted 8,760 unique online job postings between January and December 2018. During this period, businesses with the greatest number of unique online job postings in San Diego County were Ross Stores, Gap, Avon Products, L Brands, and Cintas Corporation (Exhibit 4).

Exhibit 4: Businesses with the Greatest Number of Unique Online Job Postings in San Diego County, 2018

Company Name	Unique Online Job Postings	Company Name	Unique Online Job Postings
Ross Stores, Inc.	818	Republic	80
Gap Inc.	467	Urban Outfitters, Inc.	78
Avon Products, Inc.	332	Ascena Retail Group, Inc.	78
L Brands, Inc.	308	Adidas America, Inc.	74
Cintas Corporation	297	Tween Brands, Inc.	72
Nordstrom, Inc.	268	H & M Hennes & Mauritz L.P.	71
Simply	255	Tailored Brands, Inc.	69
Forever 21, Inc.	214	Levi Strauss & Co.	67
Millennium	207	Justice	64
V.F. Corporation	197	Ds Services of America, Inc.	57
Chico's Fas, Inc.	185	ABB LTD.	56
Sentex Corp	178	Kate Spade & Company	56
Goodwill Industries	170	R.R. Donnelley & Sons Company	51
SMS Marketing, Inc.	150	The Children's Place Retail Stores Inc.	47
Qt Kids Inc.	144	Pvh Corp.	47
Spectrae Inc.	136	Francesca's Holdings Corporation	46
Talk, Inc.	123	The Gymboree Corporation	46
Charlotte Russe, Inc.	109	Intelicare Direct, Inc.	46
Columbia Sportswear Company	106	RELX PLC	46
New York & Company, Inc.	103	Tommy Bahama Group, Inc.	44
Hot Topic, Inc.	101	Francesca's Services Corporation	44
Carters Oshkosh	98	Mad Engine, Inc.	43
Live Nation Entertainment, Inc.	97	Destination Maternity Corporation	43
Victoria's Secret Stores, LLC	91	Lucky Brand Jeans	43
Ralph Lauren Corporation	86	Cinnamon Entertainment Group LLC	40

JOBS

Between 2018 and 2023 in San Diego County, the number of jobs in the fashion industry is expected to decline from 32,281 to 31,942. That is a decrease of 339 jobs or 1.1 percent. Comparatively, California is projected to decline by 4,869 jobs (or 1.1 percent) (Exhibit 5a).

Exhibit 5a: Fashion Industry Jobs Change by Region, 2018-2023

Region	2018 Jobs	2023 Jobs	Change (2018-2023)	Change % (2018-2023)
San Diego County	32,281	31,942	-339	1.1%
California	457,912	453,043	-4,869	1.1%

Between 2018 and 2023, the total number of jobs in San Diego County is expected to increase from 1,727,592 to 1,824,909. That is an increase of 97,317 jobs or 5.6 percent. Comparatively, California is projected to increase by 1,200,595 jobs or 6.1 percent (Exhibit 5b).

Exhibit 5b: Jobs Change by Region, 2018-2023

Region	2018 Jobs	2023 Jobs	Change (2018-2023)	Change % (2018-2023)
San Diego County	1,727,592	1,824,909	97,317	5.6%
California	19,568,418	20,769,013	1,200,595	6.1%

Within San Diego County, the top cities with the highest number of annual job openings (labor market demand) are San Diego, Carlsbad, Escondido, Chula Vista, and El Cajon (Exhibit 6).

Exhibit 6: Fashion Industry Job Openings by City in San Diego County, 2018-2023

Area	Annual Jobs Openings	Area	Annual Jobs Openings	Area	Annual Jobs Openings
San Diego	3,693	Poway	123	Otay	8
Carlsbad	858	Alpine	109	Rancho Penasquitos	6
Escondido	567	Lakeside	56	Tecate	6
Chula Vista	404	Coronado	48	Valley Center	5
El Cajon	377	Mesa	44	Hillcrest	4
Vista	357	Imperial Beach	39	Mira Mesa	4
National City	321	Lemon Grove	39	Rancho Santa Fe	4
Oceanside	265	Solana Beach	34	Spring Valley	4
La Jolla	250	Del Mar	27	Clairemont	3
San Ysidro	250	Boulevard	17	Fallbrook	3
Encinitas	208	Hillsdale	17	Guatay	3
San Marcos	207	Cajon	10	Pine Valley	3
La Mesa	189	Pala	9		
Santee	145	Ramona	9		

Businesses in the San Diego County posted 8,760 unique online job postings between January and December 2018. During this period, 1,604 or 18 percent of the 8,760 online job postings were for “Retail Sales Associates” (Exhibit 7).

Exhibit 7: Top Technical Skills in Online Job Postings by Percentage in San Diego County, 2018

Job Title	Unique Online Job Postings	Job Title	Unique Online Job Postings
Retail Sales Associates	1,604	Customer Experience Managers (Management)	47
Sales Managers (Sales and Related)	530	Software Engineers	47
Sales Representatives	358	Merchandise Support Associates	47
Customer Service Associates (Sales and Related)	303	Restaurant Managers (Food Preparation and Serving Related)	45
Customer Service Representatives (Office and Administrative Support)	201	B2B Sales Representatives	45
Assistant Store Managers (Sales and Related)	173	Store Managers (Sales and Related)	40
Seasonal Sales Representatives	165	Warehouse Workers (Office and Administrative Support)	40
Key Holders	137	Sales Advisors	35
Sales Managers (Management)	134	Machine Operators (Production)	33
Loss Prevention Specialists	124	Account Executives (Sales and Related)	32
Sales Leads	116	Tutors	30
English Teachers	114	Sales Assistants (Sales and Related)	29
Area Supervisors (Sales and Related)	100	Administrative Assistants	29
Sales Leaders (Sales and Related)	98	Lead Consultants	28
Sales Supervisors	94	Retail Cosmetics Sales Beauty Advisors	28
Floor Supervisors (Sales and Related)	84	Account Managers (Management)	27
Business Development Managers (Sales and Related)	77	Sales Team Leaders	25
Sales Executives (Management)	76	Product Managers (Management)	24
Visual Merchandisers	74	Branch Managers	24
Store Managers (Management)	62	Support Advisors	24
Stock Clerks	62	Research Analysts (Life, Physical, and Social Science)	23
English as a Second Language (ESL) Teachers	61	Inside Sales Representatives	23
Store Detectives	54	Outside Sales Media Consultants	23
Sales Specialists	52	Training Managers (Management)	22
Marketing Managers (Management)	51	Quality Assurance Engineers (Architecture and Engineering)	22

This section examines the top jobs by percent of total jobs in the industry. In 2018, 10,310 or 31.9 percent of the 32,281 jobs in the fashion industry were for “Retail Salespersons” (Exhibit 8). The top 20 jobs below make up 71 percent of the fashion industry.

Exhibit 8: Top Jobs by Percent of Total Jobs in the Fashion Industry, 2018

Occupational Title	Employed in Industry Group (2018)	% of Total Jobs in Industry Group (2018)	Typical Entry-Level Education	Typical On-the-Job Training (OJT)	Work Experience Required	Median Hourly Earnings
Retail Salespersons	10,310	31.9%	No formal educational credential	Short-term OJT	None	\$12.34
First-Line Supervisors of Retail Sales Workers	2,301	7.1%	High school (HS) diploma or equivalent	None	< 5 years	\$17.89
Cashiers	1,276	4.0%	No formal educational credential	Short-term OJT	None	\$11.46
Stock Clerks and Order Fillers	1,028	3.2%	HS diploma or equivalent	Short-term OJT	None	\$12.29
Sewing Machine Operators	898	2.8%	No formal educational credential	Short-term OJT	None	\$12.60
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	780	2.4%	No formal educational credential	Short-term OJT	None	\$13.01
Writers and Authors	767	2.4%	Bachelor's degree	Long-term OJT	None	\$18.89
Musicians and Singers	767	2.4%	No formal educational credential	Long-term OJT	None	\$19.08
Printing Press Operators	649	2.0%	HS diploma or equivalent	Moderate-term OJT	None	\$16.53
General and Operations Managers	552	1.7%	Bachelor's degree	None	5 years+	\$51.54
Laborers and Freight, Stock, and Material Movers, Hand	443	1.4%	No formal educational credential	Short-term OJT	None	\$13.37
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	429	1.3%	HS diploma or equivalent	Moderate-term OJT	None	\$24.84
Fine Artists, Including Painters, Sculptors, and Illustrators	409	1.3%	Bachelor's degree	Long-term OJT	None	\$10.46
Customer Service Representatives	401	1.2%	HS diploma or equivalent	Short-term OJT	None	\$17.73
Graphic Designers	393	1.2%	Bachelor's degree	None	None	\$20.59
Shipping, Receiving, and Traffic Clerks	386	1.2%	HS diploma or equivalent	Short-term OJT	None	\$15.91
Office Clerks, General	359	1.1%	HS diploma or equivalent	Short-term OJT	None	\$15.03
Tailors, Dressmakers, and Custom Sewers	297	0.9%	No formal educational credential	Moderate-term OJT	None	\$12.88
Managers, All Other	278	0.9%	Bachelor's degree	None	< 5 years	\$40.44
Sales Managers	276	0.9%	Bachelor's degree	None	< 5 years	\$48.77

TECHNICAL SKILLS

Businesses in the San Diego County posted 8,760 unique online job postings between January and December 2018. During this period, 2,940 or 34 percent of the 8,760 online job postings listed “Merchandising” as a desired technical skill (Exhibit 9).

Exhibit 9: Top Technical Skills in Online Job Postings by Percentage in San Diego County, 2018

Technical Skill	% of Total Online Job Postings	Technical Skill	% of Total Online Job Postings
Merchandising	34%	Fire Alarm Systems	3%
Selling Techniques	27%	Wholesaling	3%
Loss Prevention	25%	Compliance Training	3%
Customer Experience	13%	Mobile Marketing	3%
Visual Merchandising	10%	Standard Operating Procedure	3%
Cash Register	7%	Accounting	3%
Customer Satisfaction	6%	Biotechnology	3%
Operational Excellence	6%	Strategic Business Unit	3%
Deposit Accounts	6%	Strategic Planning	2%
Restaurant Operation	5%	Onboarding	2%
Retail Management	5%	Performance Appraisal	2%
Valid Driver's License	5%	Good Driving Record	2%
Cashiering	4%	Warehousing	2%
Sales Management	4%	Performance Indicator	2%
Purchasing	4%	Customer Relationship Management	2%
Loyalty Programs	4%	Auditing	2%
Point Of Sale	4%	Inventory Control	2%
Conflict Management	4%	Safety Standards	2%
Passive Incomes	4%	Employee Benefits	2%
Service Desk	4%	Eager Evaluations	2%
Demos	4%	Lesson Planning	2%
Alarm Devices	3%	Overhead (Business)	2%
Profit Sharing	3%	Product Quality Assurance	2%
Markdown	3%	Retention Rate	2%
Business to Business	3%	Payment Processing	2%

SOFT SKILLS

Businesses in San Diego County posted 8,760 unique online job postings between January and December 2018. During this period, 5,391 or 62 percent of the 8,760 online job postings listed “Sales” as a desired soft skill (Exhibit 10).

Exhibit 10: Top Soft Skills in Online Job Postings by Percentage in the San Diego County, 2017

Soft Skill	% of Total Online Job Postings	Soft Skill	% of Total Online Job Postings
Sales	62%	Proactivity	3%
Management	47%	Mentorship	3%
Customer Service	44%	Hospitality	3%
Communications	29%	Decision Making	3%
Operations	24%	Training And Development	3%
Leadership	24%	Teaching	3%
Innovation	13%	Service-Orientation	3%
Presentations	13%	Team Performance Management	2%
Retail Sales	11%	Microsoft Office	2%
Interpersonal Skills	9%	Microsoft PowerPoint	2%
Time Management	8%	Adaptabilities	2%
Creativity	7%	Coordinating	2%
Written Communication	7%	Data Entry	2%
Verbal Communication Skills	7%	Team Building	2%
Problem Solving	6%	Office Suite	1%
Trust	6%	Interpersonal Communications	1%
Prioritization	6%	Data Analysis	1%
Microsoft Excel	5%	Spanish Language	1%
Computer Literacy	5%	Writing	1%
Microsoft Outlook	4%	Microsoft Word	1%
Business Acumen	4%	Chinese Language	1%
Career Development	4%	English Language	1%
Information Technology	4%	Cleanliness	1%
Research	4%	Engagement Skills	1%
Friendliness	4%	Creative Problem-Solving	1%

