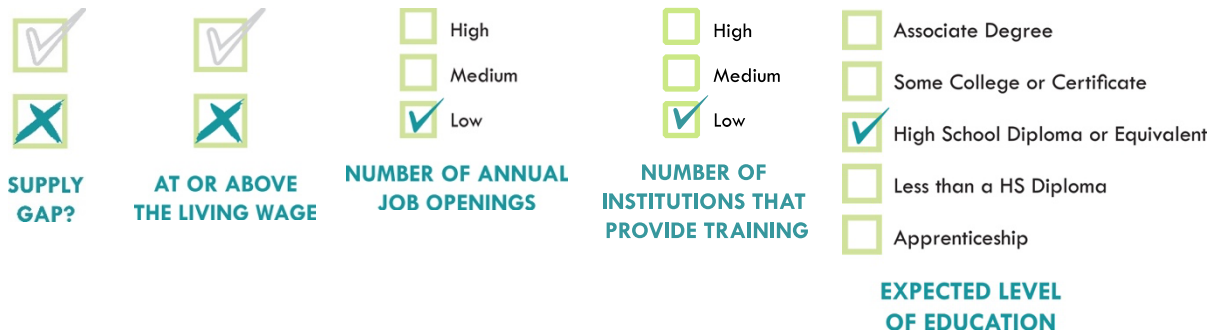


# Fashion Occupations

## Labor Market Analysis: San Diego County

May 2019

### Summary



This report is intended to help determine whether there is demand in the local labor market that is not currently met by supply from community college programs for *Fashion Occupations*. To define “Fashion Occupations,” this study relies on previous labor market research conducted by the Los Angeles/Orange County and Inland Empire/Desert Region Centers of Excellence for Labor Market Research (COE). *Fashion Occupations* in this report include *Costume Attendants; Fabric and Apparel Patternmakers; Fashion Designers; Merchandise Displayers and Window Trimmers; Sewers, Hand; Sewing Machine Operators; and Tailors, Dressmakers, and Customer Sewers*. The following summarizes key findings from this brief:

- Collectively, *Fashion Occupations* in San Diego County have a labor market demand of 353 annual job openings. Comparatively, the average occupation in San Diego County has a labor market demand of 277 annual job openings.
- Three educational institutions in San Diego County supply 411 awards for these occupations, suggesting that there is an oversupply in the region.
- *Fashion Occupations* have entry-level hourly earnings below the Self-Sufficiency Standard (\$15.99) with the exception of *Fashion Designers* and *Costume Attendants*, which have **median** hourly earnings of \$29.32 and \$16.13, respectively.
- With the exception of *Fashion Designers*, *Fashion Occupations* have no formal educational credential or high school diploma (or equivalent) as their educational requirements.
- According to the California Community Colleges LaunchBoard, between 25 and 33 percent of students earned a living wage in programs related to *Fashion Occupations*, compared to 58 percent of students who earned a living wage in Career Education programs across the state.

## 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 two years, the COE published LMI studies for fashion-related programs in Los Angeles/Orange County and the Inland Empire/Desert Region.<sup>1</sup> These studies focus on *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.*

Using these previous studies as a basis for the types of occupations that could be trained by *Apparel Product Development; Foundations of Apparel Merchandising and Design; and Costume* programs, this report provides San Diego County labor market information for the following occupational codes in the Standard Occupational Classification (SOC)<sup>2</sup> system:

Occupational Title (SOC Code)	Description	Sample of Reported Job Titles
<b>Costume Attendants</b> (39-3092)	Select, fit, and take care of costumes for cast members, and aid entertainers. May assist with multiple costume changes during performances.	Costumer, Wardrobe Manager, Wardrobe Technician, Draper, Costume Technician
<b>Fabric and Apparel Patternmakers</b> (51-6092)	Draw and construct sets of precision master fabric patterns or layouts. May also mark and cut fabrics and apparel	Technical Designer, Sewing Pattern Layout Technician, Production Pattern Maker, Pattern Technician, Pattern Designer, Fabric Cutter
<b>Fashion Designers</b> (27-1022)	Design clothing and accessories. Create original designs or adapt fashion trends.	Costume Designer, Dance Costume Designer, Clothing Designer, Product Developer, Pattern Designer, Merchandising Director
<b>Merchandise Displayers and Window Trimmers</b> (27-1026)	Plan and erect commercial displays, such as those in windows and interiors of retail stores and at trade exhibitions.	Visual Merchandising Specialist, Merchandising Specialist or Rep, Merchandising Representative, Display Specialist
<b>Sewers, Hand</b> (51-6051)	Sew, join, reinforce, or finish, usually with needle and thread, a variety of manufactured items. Includes weavers and stitchers.	Seamstress, Dressmaker, Custom Designer, Custom Clothier, Couturier, Alteration Specialist, Hosiery Mender, Hand Stitcher
<b>Sewing Machine Operators</b> (51-6031)	Operate or tend sewing machines to join, reinforce, decorate, or perform related sewing operations in the manufacture of garment or non-garment products.	Seamstress, Sewing Operator, Sewer, Zipper Machine Operator, Sewing Machine Operator, Sample Maker, Prototype Sewer
<b>Tailors, Dressmakers, and Custom Sewers</b> (51-6052)	Design, make, alter, repair, or fit garments.	Dressmaker, Garment Fitter, Alterations Sewer, Tailor, Sewing Machine Operator, Seamstress, Prototype Technician, Designer, Custom Tailor

<sup>1</sup> Previous studies can be found on the COE website at [coeccc.net](http://coeccc.net).

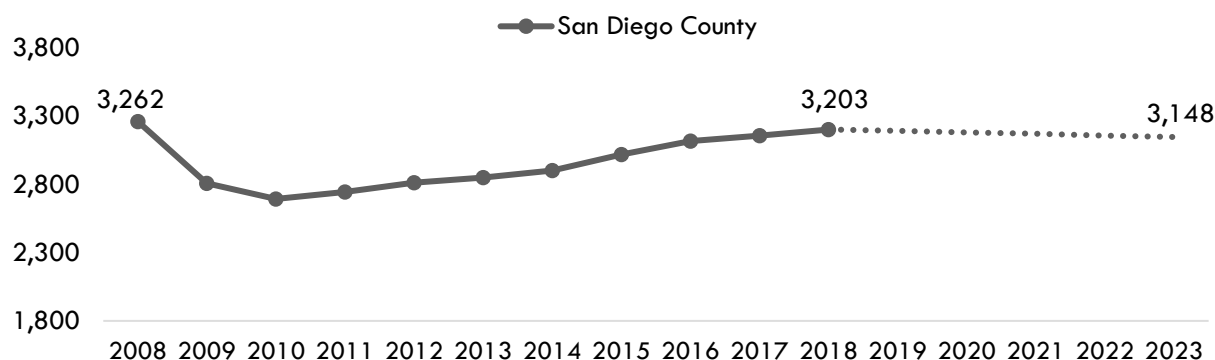
<sup>2</sup> The Standard Occupational Classification (SOC) system is used by federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating or disseminating data. [bls.gov/soc](http://bls.gov/soc).

For the purpose of this report, these SOC occupational titles are collectively referred to as “Fashion Occupations.”

## Projected Occupational Demand

Between 2018 and 2023, *Fashion Occupations* are projected to decline by 55 jobs or two percent (Exhibit 1a). Employers in San Diego County will need to hire 353 workers annually to fill new jobs and backfill jobs due to attrition caused by turnover and retirement, for example.

**Exhibit 1a: Number of Jobs for Fashion Occupations (2008-2023)<sup>3</sup>**



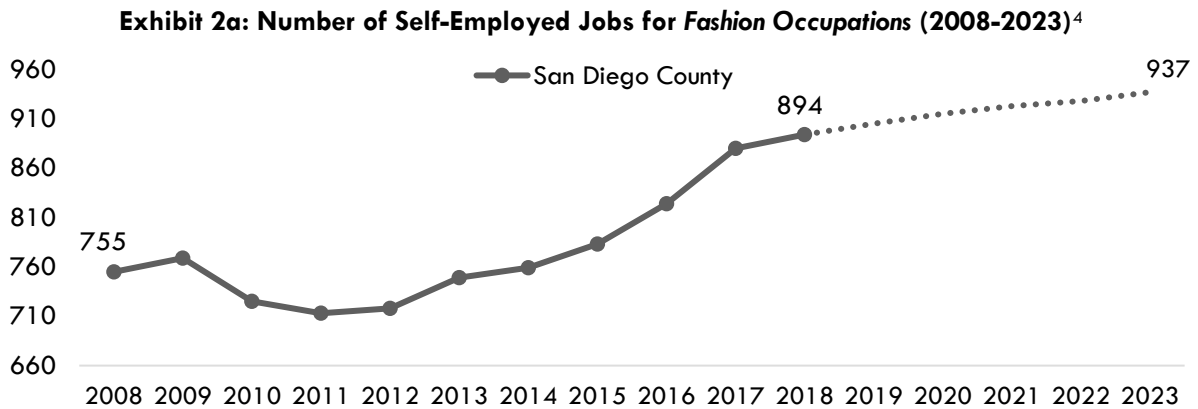
More specifically, Exhibit 1b breaks down the projected number of jobs change by occupation. While *Sewing Machine Operators* are projected to decrease by 110 total jobs, this occupation has the most labor market demand, primarily due to the attrition of workers in existing positions (Exhibit 1b).

**Exhibit 1b: Number of Jobs for Fashion Occupations in San Diego County (2018-2023)**

Occupational Title	2018 Jobs	2023 Jobs	2018 - 2023 Change	2018-2023 % Change	Annual Openings (Demand)
Sewing Machine Operators	1,555	1,445	-110	-7%	160
Merchandise Displayers and Window Trimmers	720	748	28	4%	73
Tailors, Dressmakers, and Custom Sewers	440	454	14	3%	59
Fashion Designers	322	326	4	1%	31
Costume Attendants	61	63	2	3%	14
Sewers, Hand	85	92	7	8%	13
Fabric and Apparel Patternmakers	19	19	0	0%	2
<b>Total</b>	<b>3,203</b>	<b>3,148</b>	<b>-55</b>	<b>-2%</b>	<b>353</b>

<sup>3</sup> Emsi 2019.02; QCEW, Non-QCEW, Self-Employed.

To determine the number of self-employed individuals for *Fashion Occupations*, Exhibit 2a, below, disaggregates self-employment data from Exhibit 1a. Of the 3,203 jobs for *Fashion Occupations* in 2018, nearly 900 jobs (28 percent) were filled by self-employed workers. Between 2018 and 2023, the number of self-employed workers in *Fashion Occupations* are projected to grow by 43 jobs, or five percent.



Of the 353 projected annual job openings in the labor market between 2018 and 2023 for *Fashion Occupations* (Exhibit 1b), 111 are from self-employed workers. In other words, self-employed demand amounts to approximately 31 percent of the labor market demand for *Fashion Occupations* (Exhibit 2b).<sup>5</sup>

**Exhibit 2b: Number of Self-Employed Jobs for Fashion Occupations in San Diego County (2018-2023)<sup>6</sup>**

Occupational Title	2018 Jobs	2023 Jobs	2018 - 2023 Change	2018-2023 % Change	Annual Openings (Demand)
Tailors, Dressmakers, and Custom Sewers	346	361	15	4%	48
Sewing Machine Operators	257	268	11	4%	30
Sewers, Hand	73	79	6	8%	11
Merchandise Displayers and Window Trimmers	122	127	5	4%	12
Fashion Designers	91	95	4	4%	9
Fabric and Apparel Patternmakers	<10	<10	Insf. Data	Insf. Data	Insf. Data
Costume Attendants	<10	<10	Insf. Data	Insf. Data	Insf. Data
<b>Total</b>	<b>894</b>	<b>937</b>	<b>43</b>	<b>5%</b>	<b>111</b>

<sup>4</sup> Emsi 2019.02; Self-Employed.

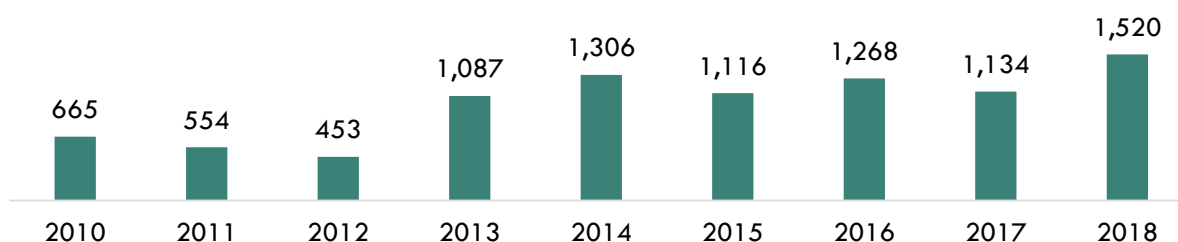
<sup>5</sup> Of the 353 annual openings for QCEW, Non-QCEW and Self-Employed, 111 are Self-Employed.

<sup>6</sup> Emsi 2019.02; Self-Employed.

## Online Job Postings

Between 2010 and 2018, there was an average of 1,011 online job postings per year for *Fashion Occupations* in San Diego County (Exhibit 3). Each year, more than 80 percent of these online job postings were for *Merchandise Displayers and Window Trimmers*.<sup>7</sup>

**Exhibit 3: Number of Online Job Postings for Fashion Occupations in San Diego County (2010-2018)<sup>8</sup>**



## Earnings

The median hourly earnings of *Fashion Occupations* range from \$10.69 to \$29.32 (Exhibit 4). *Fashion Designers* is the only occupation with entry-level and median hourly wages that meet or exceed the Self-Sufficiency Standard for a single adult in San Diego County, which is \$15.99 per hour.<sup>9</sup>

**Exhibit 4: Hourly Earnings for Fashion Occupations in San Diego County**

Occupational Title	Entry-Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
Sewing Machine Operators	\$11.24	\$12.60	\$14.40
Merchandise Displayers and Window Trimmers	\$11.26	\$14.27	\$21.76
Tailors, Dressmakers, and Custom Sewers	\$11.40	\$12.88	\$14.28
Fashion Designers	\$24.67	\$29.32	\$38.71
Costume Attendants	\$13.29	\$16.13	\$20.10
Sewers, Hand	\$9.57	\$10.69	\$11.77
Fabric and Apparel Patternmakers	\$10.54	\$11.45	\$17.50

<sup>7</sup> The number of online job postings per year for Merchandise Displayers and Window Trimmers: 2010 = 573. 2011 = 479. 2012 = 375. 2013 = 932. 2014 = 1,183. 2015 = 1,031. 2016 = 1,186. 2017 = 1,075. 2018 = 1,342.

<sup>8</sup> Burning Glass Technologies, "Labor Insight Real-Time Labor Market Information Tool." 2010-2018.

<sup>9</sup> "The Cost of Being Californian: A Look at the Economic Health of California Families," Insight: Center for Community Economic Development, last updated 2019. [insightccd.org/2018-self-sufficiency-standard](https://insightccd.org/2018-self-sufficiency-standard). Median earnings of \$15.99/hr mean that half of workers in that occupation make more and half make less ([kb.economicmodeling.com/glossary](https://kb.economicmodeling.com/glossary)).

## Educational Supply

Educational supply for an occupation can be estimated by analyzing the number of awards in related Taxonomy of Programs (TOP) or Classification of Instructional Programs (CIP) codes.<sup>10</sup> There are four TOP codes and five CIP codes related to *Fashion Occupations* (Exhibit 5).

**Exhibit 5: Related TOP and CIP Codes for *Fashion Occupations***

<i>Fashion Occupations</i>
TOP 130300: Fashion
TOP 130310: Fashion Design
TOP 130320: Fashion Merchandising
TOP 130330: Fashion Production
CIP 19.0901: Apparel and Textiles, General
CIP 19.0902: Apparel and Textile Manufacture
CIP 19.0906: Fashion and Fabric Consultant
CIP 50.0407: Fashion/Apparel Design
CIP 50.0510: Costume Design
CIP 521902: Fashion Merchandising

According to TOP data, three community colleges supply the region with awards for these occupations: Palomar College, San Diego Continuing Education, and San Diego Mesa College (Exhibit 6). According to CIP data, The Art Institute of California-San Diego supplied one award per year in its associate degree program, but the college is no longer in operation. Additionally, Point Loma Nazarene University (PLNU) previously had a bachelor's degree program in Fashion and Interiors, Concentration on Fashion Merchandising, respectively, but discontinued the program.<sup>11</sup>

<sup>10</sup> TOP data comes from the California Community Colleges Chancellor's Office MIS Data Mart ([datamart.cccco.edu](http://datamart.cccco.edu)) and CIP data comes from the Integrated Postsecondary Education Data System ([nces.ed.gov/ipeds/use-the-data](http://nces.ed.gov/ipeds/use-the-data)).

<sup>11</sup> "Fashion and Interiors – Concentration in Fashion Merchandising, B.A.," PLNU, [catalog.pointloma.edu/preview\\_program.php?catoid=8&poid=402](http://catalog.pointloma.edu/preview_program.php?catoid=8&poid=402)

**Exhibit 6: Number of Awards (Certificates and Degrees) Conferred by Postsecondary Institutions  
(Program Year 2013-14 through PY2016-17 Average)**

TOP6 or CIP	TOP6 or CIP Title	3-Yr Annual Average CC Awards (PY14-15 to PY16-17)	Other Educational Institutions 3-Yr Annual Average Awards (PY13-14 to PY15-16)	3-Yr Total Average Supply (PY13-14 to PY16-17)
130300	Fashion	<b>347</b>	<b>0</b>	<b>347</b>
	• San Diego Cont. Ed.	347	0	
	Noncredit award 48 to < 96 hours	308		
	Noncredit award 192 to < 288 hours	25		
	Noncredit award 96 to < 144 hours	14		
130310	Fashion Design	<b>27</b>	<b>0</b>	<b>27</b>
	• Palomar	8	0	
	Associate Degree	6		
	Certificate 30 to < 60 semester units	2		
	• San Diego Mesa	19	0	
	Associate Degree	9		
	Certificate 30 to < 60 semester units	10		
130320	Fashion Merchandising	<b>27</b>	<b>0</b>	<b>27</b>
	• Palomar	17	0	
	Associate Degree	9		
	Certificate 30 to < 60 semester units	1		
	Certificate 18 to < 30 semester units	7		
	• San Diego Mesa	10	0	
	Associate Degree	4		
	Certificate 30 to < 60 semester units	4		
	Certificate 18 to < 30 semester units	2		
130330	Fashion Production	<b>10</b>	<b>0</b>	<b>10</b>
	• San Diego Cont. Ed.	10	0	
	Noncredit award 192 to < 288 hours	10		
			<b>Total</b>	<b>411</b>

## Demand vs. Supply

Comparing labor demand (annual openings) with labor supply<sup>12</sup> suggests that there is an **oversupply** for these occupations in San Diego County, with **353** annual openings and **411** awards (Exhibit 7).

### Exhibit 7: Labor Demand (Annual Openings) Compared with Labor Supply (Average Annual Awards)

	Demand (Annual Openings)	Supply (Total Annual Average Supply)	Supply Gap or <b>Oversupply</b>
San Diego County	353	411	<b>58</b>

**Note:** This is a basic analysis of supply and demand of labor. This data should be used to discuss the potential gaps or oversupply of workers; however, it should not be the only basis for determining whether or not a program should be developed. Additionally, the data does not include workers who are currently in the labor force who could fill these positions or workers not captured by publicly available data.

## Student Outcomes and Regional Comparisons

According to the California Community Colleges LaunchBoard, there was insufficient data to calculate the following student outcomes and metrics in the San Diego-Imperial region:

- Percentage of Students Employed in a Job Closely Related to Field of Study
- Proportion of Students Who Earned a Living Wage

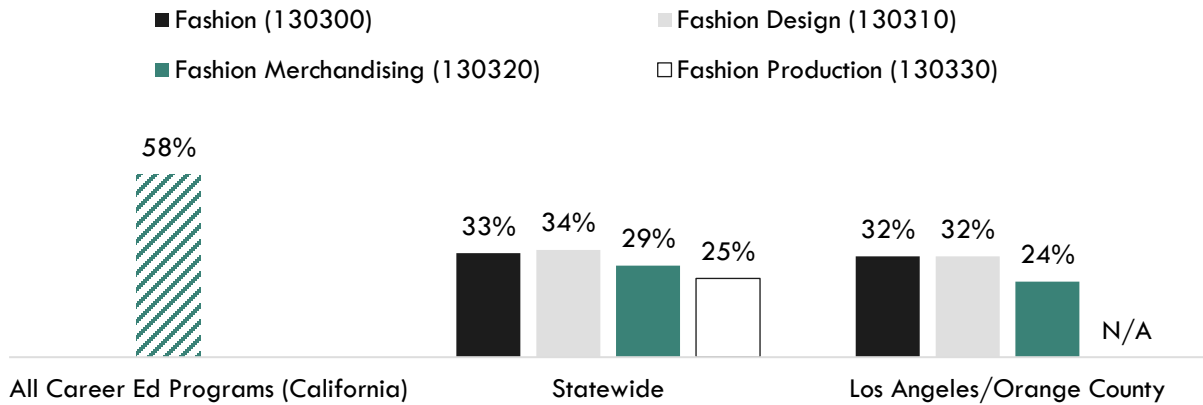
As a result, this section uses fashion programs statewide and in Los Angeles/Orange County to better understand student outcomes. Los Angeles/Orange County has 11 different colleges that offer programs related to *Fashion Occupations*. Additionally, in the past two program years, the Los Angeles/Orange County COE received the most number of data requests of all COEs for *Fashion Occupations*, 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*.

According to the California Community Colleges LaunchBoard, between 25 and 33 percent of students earned a living wage in programs related to *Fashion Occupations*, compared to 58 percent of students who earned a living wage in Career Education programs across the state (Exhibit 8a).

<sup>12</sup> Labor supply can be found from two different sources: EMSI or the California Community Colleges Chancellor's Office MIS Data Mart. EMSI uses CIP codes while MIS uses TOP codes. Different coding systems result in differences in the supply numbers.

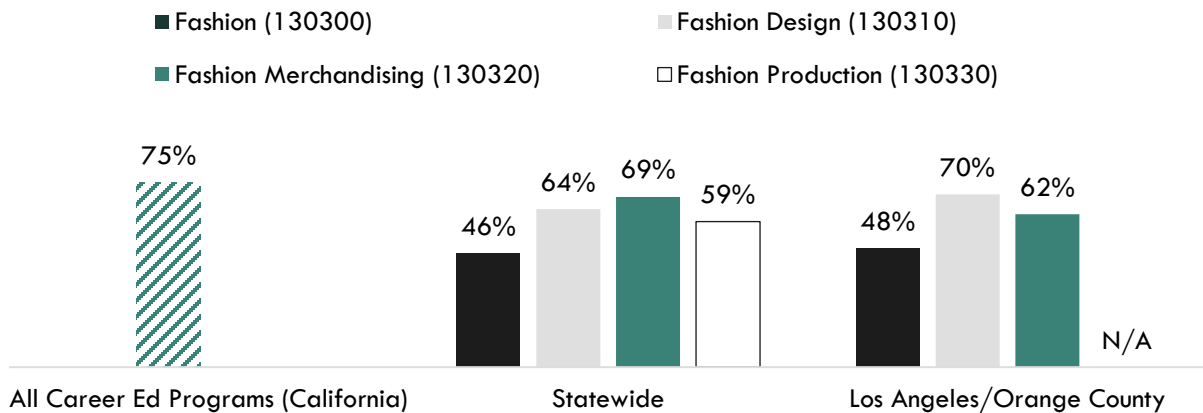


**Exhibit 8a: Proportion of Students Who Earned a Living Wage, PY2015-16<sup>13</sup>**



According to the California Community Colleges LaunchBoard, 75 percent of students in Career Education statewide obtained a job closely related to their field of study compared to 46 percent of students from Fashion (130300), 64 percent from Fashion Design (130310), 69 percent from Fashion Merchandising (130320), and 59 percent from Fashion Production (130330) across the state (Exhibit 8b).

**Exhibit 8b: Percentage of Students in a Job Closely Related to Field of Study, PY2014-15<sup>14</sup>**



<sup>13</sup> Among completers and skills builders who exited, the proportion of students who attained a living wage.

<sup>14</sup> Most recent year with available data is Program Year 2014-15. Percentage of Students in a Job Closely Related to Field of Study: Among students who responded to the CTEOS, the percentage reporting employment in the same or similar field as their program of study.

## Top Employers and Work Locations

Between January 1, 2016 and December 31, 2018, the top five employers in San Diego County for these occupations were [Advantage Sales & Marketing](#), [Macy's](#), [TJX Companies](#), [JCPenney](#), and [Marshalls Incorporated](#) (Exhibit 9).

**Exhibit 9: Top Employers in San Diego County for Fashion Occupations<sup>15</sup>**

Top Employers	
<ul style="list-style-type: none"> <li>• Advantage Sales &amp; Marketing</li> <li>• Macy's</li> <li>• TJX Companies, Inc.</li> <li>• JCPenney</li> <li>• Marshalls Incorporated</li> <li>• Toys R Us, Inc.</li> </ul>	<ul style="list-style-type: none"> <li>• Target</li> <li>• American Greetings Corporation, Inc.</li> <li>• Sears</li> <li>• Acosta Incorporated</li> <li>• Kellogg Company</li> <li>• Petco</li> </ul>

## Skills, Education, and Certifications

With the exception of *Fashion Designers*, *Fashion Occupations* have no formal educational credential or high school diploma (or equivalent) as their educational requirements (Exhibit 10).

**Exhibit 10: Training and Educational Requirements for Fashion Occupations<sup>16</sup>**

Occupational Title	On-the-Job Training Requirement	Typical Entry-Level Education
Costume Attendants	Short-term OJT	High school diploma or equivalent
Fabric and Apparel Patternmakers	Moderate-term OJT	High school diploma or equivalent
Fashion Designers	None	Bachelor's degree
Merchandise Displayers and Window Trimmers	Short-term OJT	High school diploma or equivalent
Sewers, Hand	Moderate-term OJT	No formal educational credential
Sewing Machine Operators	Short-term OJT	No formal educational credential
Tailors, Dressmakers, and Custom Sewers	Moderate-term OJT	No formal educational credential

<sup>15</sup> Burning Glass Technologies, "Labor Insight Real-Time Labor Market Information Tool." 2016-2018.

<sup>16</sup> Emsi, 2019.02; QCEW, Non-QCEW, Self-Employed.

Exhibit 11 lists the top specialized, soft, and software skills that appeared in online job postings between January 1, 2016 and December 31, 2018.

**Exhibit 11: Top Skills for Fashion Occupations in San Diego County<sup>17</sup>**

Specialized Skills	Soft Skills	Software Skills
<ul style="list-style-type: none"> <li>• Merchandising</li> <li>• Retail Industry Knowledge</li> <li>• Sales</li> <li>• Customer service</li> <li>• Scheduling</li> </ul>	<ul style="list-style-type: none"> <li>• Physical Abilities</li> <li>• Communication Skills</li> <li>• Organizational Skills</li> <li>• Teamwork / Collaboration</li> <li>• Detail-Oriented</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Excel</li> <li>• Microsoft Office</li> <li>• Microsoft Word</li> <li>• Adobe Acrobat</li> <li>• Microsoft PowerPoint</li> </ul>

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**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.

<sup>17</sup> Burning Glass Technologies, “Labor Insight Real-Time Labor Market Information Tool.” 2016-2018.