

**Labor Market Analysis for Program Recommendation**

**Esthetician Occupations**

**College of San Mateo**

## Prepared by the San Francisco Bay Center of Excellence for Labor Market Research

## December 2023

## Recommendation

Based on all available data, there appears to be an “undersupply” of Esthetician workers compared to the demand for this cluster of occupations in the Bay region and in the Mid-Peninsula sub-region (San Francisco, San Mateo counties). There is a projected annual gap of about 1,111 students in the Bay region and 203 students in the Mid-Peninsula Sub-Region.

## Introduction

This report provides student outcomes data on employment and earnings for TOP 3007.00 - Cosmetology and Barbering programs in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at colleges in the state and region, as well as to outcomes across all CTE programs at College of San Mateo and in the region.

This report profiles Esthetician Occupations in the 12 county Bay region and in the Mid-Peninsula sub-region for a proposed new Esthetician Certificate of Achievement program at College of San Mateo.

* **Hairdressers, Hairstylists, and Cosmetologists (39-5012):** Provide beauty services, such as shampooing, cutting, coloring, and styling hair, and massaging and treating scalp. May apply makeup, dress wigs, perform hair removal, and provide nail and skin care services. Excludes “Makeup Artists, Theatrical and Performance (39-5091),”Manicurists and Pedicurists” (39-5092), and “Skincare Specialists” (39-5094).
  Entry-Level Educational Requirement: Postsecondary nondegree award
  Training Requirement: None
  Percentage of Community College Award Holders or Some Postsecondary Coursework: 43%
* **Skincare Specialists (39-5094):** Provide skincare treatments to face and body to enhance an individual’s appearance. Includes electrologists and laser hair removal specialists.
  Entry-Level Educational Requirement: Postsecondary nondegree award
  Training Requirement: None
  Percentage of Community College Award Holders or Some Postsecondary Coursework: 52%

## Occupational Demand

**Table 1. Employment Outlook for Esthetician Occupations in Bay Region**

| **Occupation** | **2021 Jobs** | **2026 Jobs** | **5-yr Change** | **5-yr % Change** | **5-yr Total Openings** | **Annual Openings** | **25% Hourly Earning** | **Median Hourly Wage** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Hairdressers, Hairstylists, and Cosmetologists | 4,642 | 6,930 | 2,288 | 49% | 6,417 | 1,283 | $14 | $15 |
| Skincare Specialists | 1,883 | 2,435 | 552 | 29% | 2,071 | 414 | $16 | $18 |
| **Total** | **6,525** | **9,365** | **2,840** | **44%** | **8,488** | **1,697** |  |  |
| Source: Lightcast 2022.3 |
| **Bay Region includes:** Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties |

**Table 2. Employment Outlook for Esthetician Occupations in Mid-Peninsula Sub-region**

| **Occupation** | **2021 Jobs** | **2026 Jobs** | **5-yr Change** | **5-yr % Change** | **5-yr Total Openings** | **Annual Openings** | **25% Hourly Earning** | **Median Hourly Wage** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Hairdressers, Hairstylists, and Cosmetologists | 1,005 | 1,440 | 435 | 43% | 1,327 | 265 | $15 | $17 |
| Skincare Specialists | 491 | 600 | 109 | 22% | 498 | 100 | $17 | $19 |
| **Total** | **1,496** | **2,040** | **544** | **36%** | **1,825** | **365** |  |  |
| Source: Lightcast 2022.3 |
| **Mid-Peninsula Sub-Region includes:** San Francisco, San Mateo Counties |

### Job Postings in Bay Region and Mid-Peninsula Sub-Region

**Table 3. Number of Job Postings by Occupation for latest 12 months**

| **Occupation** | **Bay Region** | **Mid-Peninsula** |
| --- | --- | --- |
| Hairdressers, Hairstylists, and Cosmetologists | 2,515 | 463 |
| Skincare Specialists | 194 | 52 |
| Source: Lightcast |

**Table 4a. Top Job Titles for Esthetician Occupations for latest 12 months - Bay Region**

| **Title** | **Bay** | **Title** | **Bay** |
| --- | --- | --- | --- |
| Hair Stylists | 1,110 | Hair Stylists/Cosmetologists | 47 |
| Stylists | 452 | Marketplace Managers | 47 |
| Estheticians | 95 | Cosmetologists/Hairstylists | 41 |
| Licensed Hair Stylists | 85 | Design Studio Specialists | 24 |
| Beauty Specialists | 77 | Licensed Aestheticians | 24 |
| Cosmetologists | 61 | People Managers | 23 |
| Licensed Cosmetologists | 61 | Sales Stylists | 18 |
| Stylists/Cosmetologists | 61 | Personal Stylists | 16 |
| Wax Specialists | 51 | Salon Stylists | 15 |
| Source: Lightcast |

**Table 4b. Top Job Titles for Esthetician Occupations for latest 12 months - Mid-Peninsula Sub-Region**

| **Title** | **Mid-Peninsula** | **Title** | **Mid-Peninsula** |
| --- | --- | --- | --- |
| Hair Stylists | 164 | Licensed Aestheticians | 5 |
| Stylists | 100 | Hair Stylists/Cosmetologists | 4 |
| Beauty Specialists | 63 | Personal Stylists | 4 |
| Estheticians | 30 | Aestheticians | 3 |
| Stylists/Cosmetologists | 15 | Aestheticians/Cosmetologists | 3 |
| Cosmetologists | 11 | Beauty Stylists | 3 |
| Licensed Cosmetologists | 11 | Greenhouse Managers | 3 |
| Cosmetologists/Hairstylists | 8 | Hair Color Specialists | 3 |
| Design Studio Specialists | 8 | Marketplace Managers | 3 |
| Source: Lightcast |

## Industry Concentration

**Table 5. Industries hiring Esthetician Workers in Bay Region**

| **Industry - 6 Digit NAICS (No. American Industry Classification) Codes** | **Jobs in Industry (2021)** | **Jobs in Industry (2026)** | **% Change (2021-26)** | **% Occupation Group in Industry (2022)** |
| --- | --- | --- | --- | --- |
| Beauty Salons | 10,892 | 11,328 | 4% | 66% |
| Nail Salons | 1,935 | 3,184 | 65% | 14% |
| Other Personal Care Services | 1,380 | 2,068 | 50% | 10% |
| Barber Shops | 162 | 262 | 62% | 1% |
| Offices of Physicians (except Mental Health Specialists) | 163 | 136 | -17% | 1% |
| Cosmetics, Beauty Supplies, and Perfume Retailers | 226 | 116 | -49% | 1% |
| Department Stores | 100 | 82 | -17% | 1% |
| Warehouse Clubs and Supercenters | 104 | 85 | -19% | 1% |
| Fitness and Recreational Sports Centers | 79 | 92 | 16% | 1% |
| All Other General Merchandise Retailers | 98 | 97 | -1% | 1% |
| Source: Lightcast 2022.3 |

**Table 6. Top Employers Posting Esthetician Occupations in Bay Region and Mid-Peninsula Sub-Region**

| **Employer** | **Bay** | **Employer** | **Mid-Peninsula** |
| --- | --- | --- | --- |
| Great Clips | 832 | Great Clips | 118 |
| Supercuts | 245 | Supercuts | 54 |
| Regis Corporation | 188 | Regis Corporation | 39 |
| Sport Clips | 72 | Saks Fifth Avenue | 29 |
| Ulta Beauty | 58 | Barneys New York | 20 |
| Disability Solutions | 36 | Macy's | 8 |
| Source: Lightcast |

## Educational Supply

There are six (6) community colleges in the Bay Region issuing 221 awards on average annually (last 3 years ending 2021-22) on TOP 3007.00 - Cosmetology and Barbering. In the Mid-Peninsula Sub-Region, there are two (2) community colleges that issued 54 awards on average annually (last 3 years) on this TOP code.

There are 13 other CTE educational institutions in the Bay Region issuing 365 awards on average annually (last 3 years ending 2021-22) on CIP 12.0401 - Cosmetology/Cosmetologist, General. There are three (3) other CTE educational institution in the Mid-Peninsula Sub-Region issuing 108 awards on average annually (last 3 years) on this CIP code.

**Table 7a. Community College Awards on TOP 3007.00 - Cosmetology and Barbering in Bay Region**

| **College** | **Subregion** | **Associate Degree** | **High unit Certificate** | **Low unit Certificate** | **Total** |
| --- | --- | --- | --- | --- | --- |
| Gavilan | Silicon Valley | 1 | 0 | 23 | 24 |
| Laney | East Bay | 7 | 20 | 0 | 27 |
| San Jose City | Silicon Valley | 8 | 50 | 39 | 97 |
| San Mateo | Mid-Peninsula | 2 | 16 | 0 | 18 |
| Skyline | Mid-Peninsula | 2 | 19 | 15 | 36 |
| Solano | North Bay | 5 | 14 | 0 | 19 |
| **Total** |  | **25** | **119** | **77** | **221** |
| Source: Data Mart |
| Note: The annual average for awards is 2019-20 to 2021-22. |

**Table 7b. Other CTE Institutions Awards on CIP 12.0401 Cosmetology/Cosmetologist, General in Bay Region**

| **College** | **Subregion** | **Certificates of at least 1 but < 2 yrs.** | **Total** |
| --- | --- | --- | --- |
| Blake Austin College | North Bay | 23 | 23 |
| Cinta Aveda Institute | Mid-Peninsula | 58 | 58 |
| Hilltop Beauty School | Mid-Peninsula | 28 | 28 |
| Hinton Barber and Beauty College | North Bay | 7 | 7 |
| International College of Cosmetology | East Bay | 24 | 24 |
| J D Academy of Salon and Spa | East Bay | 22 | 22 |
| Lytles Redwood Empire Beauty College | North Bay | 34 | 34 |
| Milan Institute of Cosmetology-Vacaville | North Bay | 13 | 13 |
| Moler Barber College | East Bay | 20 | 20 |
| Paul Mitchell the School-East Bay | East Bay | 64 | 64 |
| San Francisco Institute of Esthetics & Cosmetology Inc | Mid-Peninsula | 22 | 22 |
| The Salon Professional Academy- San Jose | Silicon Valley | 42 | 42 |
| Waynes College of Beauty | SC-Monterey | 8 | 8 |
| **Total** |  | **365** | **365** |
| Source: Data Mart |
| Note: The annual average for awards is 2019-20 to 2021-22. |

## Gap Analysis

Based on the data included in this report, there is a labor market gap in the Bay region with 1,697 annual openings for the Esthetician occupational cluster and 586 annual (3-year average) awards for an annual undersupply of 1,111 students. In the Mid-Peninsula Sub-Region, there is also a gap with 365 annual openings and 162 annual (3-year average) awards for an annual undersupply of 203 students.

## Student Outcomes

**Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 3007.00 - Cosmetology and Barbering**

| **Metric Outcomes** | **Bay All CTE Programs** | **CSM All CTE Programs** | **State 3007.00** | **Bay 3007.00** | **Mid-Peninsula 3007.00** | **CSM 3007.00** |
| --- | --- | --- | --- | --- | --- | --- |
| Students with a Job Closely Related to Their Field of Study | 74% | 75% | 70% | 60% | 54% | 60% |
| Median Annual Earnings for SWP Exiting Students | $53,090 | $61,180 | $22,828 | $28,161 | $30,650 | $23,364 |
| Median Change in Earnings for SWP Exiting Students | 24% | 21% | 26% | 40% | 41% | 94% |
| Exiting Students Who Attained the Living Wage | 54% | 44% | 19% | 17% | 14% | 0% |
| Source: Launchboard Strong Workforce Program Median of 2018 to 2021. |

## Skills, Certifications and Education

**Table 9. Top Skills for Esthetician Occupations in Bay Region**

| **Skill** | **Posting** | **Skill** | **Posting** |
| --- | --- | --- | --- |
| Cosmetology | 1,536 | Skin Care | 91 |
| Housekeeping | 319 | Point Of Sale | 83 |
| Product Knowledge | 289 | Visual Merchandising | 77 |
| Selling Techniques | 242 | Booking (Sales) | 74 |
| Professional Hair Care | 170 | Standard Operating Procedure | 65 |
| Merchandising | 136 | Cross-Selling | 56 |
| Cosmetics | 100 | New Product Development | 51 |
| Wax | 100 | Cash Register | 47 |
| Business Development | 95 | Lookbook | 46 |
| Ear Piercing | 94 | Manicure | 46 |
| Source: Lightcast |

**Table 10. Certifications for Esthetician Occupations in Bay Region**

| **Certification** | **Posting** |
| --- | --- |
| Barber License | 1,176 |
| Cosmetology License | 324 |
| Esthetician License | 103 |
| Valid Driver's License | 83 |

**Table 11. Education Requirements for Esthetician Occupations in Bay Region**

| **Education Level** | **Job Postings** | **% of Total** |
| --- | --- | --- |
| High school or GED | 141 | 73% |
| Associate degree | 8 | 4% |
| Bachelor's degree & higher | 43 | 22% |
| Source: Lightcast |
| Note: 94% of records have been excluded because they do not include a degree level. As a result, the chart above may not be representative of the full sample. |

## Methodology

Occupations for this report were identified by use of job descriptions and skills listed in O\*Net. Labor demand data is sourced from Lightcast occupation and job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CCCCO Data Mart and CTE Launchboard.

## Sources

O\*Net Online
Lightcast
CTE LaunchBoard www.calpassplus.org
Launchboard
Statewide CTE Outcomes Survey
Employment Development Department Unemployment Insurance Dataset
Living Insight Center for Community Economic Development
Chancellor’s Office MIS system

## Contacts

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