**Cosmetology Occupations**

**Labor Market Information Report**

Prepared by the San Francisco Bay Center of Excellence

for Labor Market Research

November 2017

# Recommendation

Based on all available data included in this report, there appears to be a significant undersupply of students graduating from Cosmetology programs compared to the demand for cosmetology workers, in a cluster of four occupations, in the Bay region and the North Bay sub-region. The annual gap between demand and supply is nearly 3,540 in the region and about 565 in the North Bay sub-region. This undersupply warrants the substantive change proposed for Solano’s Cosmetology program.

This report also provides student outcomes data on employment and earnings for Solano’s Cosmetology program compared to similar data for other community colleges with Cosmetology programs in the Bay region and North Bay sub-region. It is recommended that this data be reviewed to better understand how the college’s student outcomes compare to other similar programs in the region.

# Introduction

This report profiles Cosmetology Occupations in the 12 county Bay Region and the North Bay (Marin, Napa, Solano and Sonoma counties) for Solano College.

* **First-Line Supervisors of Personal Service Workers (SOC 39-1021)**: Directly supervise and coordinate activities of personal service workers, such as flight attendants, hairdressers, or caddies.

*Entry-Level Educational Requirement:* *High school diploma or equivalent*

*Training Requirement:* *None Indicated*

*Percentage of Community College Award Holders or Some Postsecondary Coursework:* 44%

* **Hairdressers (SOC 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.

*Entry-Level Educational Requirement:* *Postsecondary Nondegree Award*

*Training Requirement:* *None Indicated*

*Percentage of Community College Award Holders or Some Postsecondary Coursework:* 29%

* **Manicurists and Pedicurists (SOC 39-5092)**: Clean and shape customers' fingernails and toenails. May polish or decorate nails.

*Entry-Level Educational Requirement:* *Postsecondary Nondegree Award*

*Training Requirement:* *None Indicated*

*Percentage of Community College Award Holders or Some Postsecondary Coursework:* 29%

* **Shampooers (SOC 39-5093)**: Shampoo and rinse customers' hair.

*Entry-Level Educational Requirement:* *No formal educational credential*

*Training Requirement:* *Short-term on the job training*

*Percentage of Community College Award Holders or Some Postsecondary Coursework:* 29%

# Occupational Demand

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2016 Jobs | 2021 Jobs | 5-Yr Change | 5-Yr % Change | 5-year Openings | Annual Open-ings | 10% Hourly Wage | Median Hourly Wage |
| First-Line Supervisors of Personal Service Workers | 5,698 | 6,880 | 1,182 | 21% | 4,169 | 834 | $11.49 | $19.54 |
| Hairdressers, Hairstylists, and Cosmetologists | 17,819 | 19,815 | 1,996 | 11% | 13,837 | 2,767 | $10.23 | $11.87 |
| Manicurists and Pedicurists | 7,555 | 8,412 | 857 | 11% | 5,359 | 1,072 | $8.96 | $11.06 |
| Shampooers | 423 | 505 | 82 | 19% | 343 | 69 | $6.64 | $9.10 |
| **Total** | **31,494** | **35,612** | **4,118** | **13%** | **23,708** | **4,742** | **$10.11** | **$13.03** |

*Source: EMSI 2017.3***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 Cosmetology Occupations in North Bay Sub-Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2016 Jobs | 2021 Jobs | 5-Yr Change | 5-Yr % Change | 5-year Openings | Annual Openings | 10% Hrly Wage | Median Hrly Wage |
| First-Line Supervisors of Personal Service Workers | 1,001 | 1,159 | 158 | 16% | 673 | 135 | $11.96 | $18.50 |
| Hairdressers, Hairstylists & Cosmetologists | 3,031 | 3,350 | 319 | 11% | 2,325 | 465 | $10.21 | $11.83 |
| Manicurists & Pedicurists | 1,017 | 1,123 | 106 | 10% | 710 | 142 | $8.51 | $10.63 |
| Shampooers | 91 | 105 | 14 | 15% | 68 | 14 | $6.79 | $10.01 |
| **Total** | **5,140** | **5,737** | **597** | **12%** | **3,777** | **755** | **$10.15** | **$12.86** |

*Source: EMSI 2017.3***North Bay Sub-Region** includes Marin, Napa, Solano and Sonoma Counties

### Job Postings in Bay Region and North Bay Sub-Region

**Table 3. Number of Job Postings by Occupation for latest 12 months (Nov. 2016 – Oct. 2017)**

|  |  |  |
| --- | --- | --- |
| Occupation | Bay Region | North Bay |
| First-Line Supervisors of Personal Service Workers | 214 | 89 |
| Hairdressers, Hairstylists, and Cosmetologists | 548 | 80 |
| Manicurists and Pedicurists | 46 | 11 |
| Shampooers | n/a | n/a |
| **Total** | **808** | **180** |

*Source: Burning Glass*

**Table 4. Top Job Titles for Cosmetology Occupations for latest 12 months (Nov. 2016 – Oct. 2017)**

|  |  |  |
| --- | --- | --- |
| Common Title | Bay Region | North Bay |
| Hair Stylist | 174 | 39 |
| Salon Manager | 62 | 16 |
| Stylist | 58 | 9 |
| Nail Technician | 31 | 7 |
| Spa Director or Manager | 31 | 25 |
| Grooming Salon Leader manager | 20 | 6 |

*Source: Burning Glass*

# Industry Concentration

**Table 4. Industries hiring Cosmetology occupations (Bay Region)**

|  |  |  |  |
| --- | --- | --- | --- |
| Industry – 6 Digit NAICS (North American Industry Classification) Codes | Jobs in Industry (2016) | | % in Industry (2016) |
| Beauty Salons (812112) | 16,088 | 51.1% | |
| Nail Salons (812113) | 4,333 | 13.8% | |
| Other Personal Care Services (812199) | 3,813 | 12.1% | |
| Services for the Elderly and Persons with Disabilities (624120) | 3,062 | 9.7% | |
| Diet and Weight Reducing Centers (812191) | 408 | 1.3% | |
| Fitness and Recreational Sports Centers (713940) | 378 | 1.2% | |
| Barber Shops (812111) | 280 | 0.9% | |
| Residential Intellectual and Developmental Disability Facilities (623210) | 235 | 0.7% | |
| Cosmetics, Beauty Supplies, and Perfume Stores (446120) | 207 | 0.7% | |
| Discount Department Stores (452112) | 202 | 0.6% | |
| Local Government, Excluding Education and Hospitals (903999) | 200 | 0.6% | |
| Department Stores (except Discount Department Stores) (452111) | 192 | 0.6% | |
| Hotels (except Casino Hotels) and Motels (721110) | 181 | 0.6% | |
| Assisted Living Facilities for the Elderly (623312) | 108 | 0.3% | |
| Child Day Care Services (624410) | 104 | 0.3% | |

*Source: EMSI 2017.3*

**Table 5. Top Employers Posting Jobs in Bay Region for latest 12 months (Nov. 2016 – Oct. 2017)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employer** | **Bay** | **Employer** | **Bay** | **Employer** | **Bay** |
| Ulta Beauty Inc. | 70 | Regis Salons | 30 | Sport Clips | 20 |
| J. Crew | 52 | Levi Strauss | 24 | PetSmart | 17 |
| Stella & Dot | 49 | Urban Outfitters, Inc. | 24 | Marriott International Inc. | 16 |
| Francescas | 42 | Petco | 22 | JC Penney | 15 |
| Great Clips | 33 | Lord & Taylor / Hudsons Bay Company | 20 | Nordstrom | 13 |

*Source: Burning Glass*

**Table 6. Top Employers Posting Jobs in North Bay Sub-Region for latest 12 months (Nov. 2016 – Oct. 2017)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employer** | **No Bay** | **Employer** | **No Bay** | **Employer** | **No Bay** |
| Ulta Beauty Inc. | 18 | Francescas | 8 | J. Crew | 5 |
| Auberge Resorts | 11 | Petco | 7 | Regis Corporation | 5 |
| Marriott International Incorporated | 11 | Great Clips | 6 | JC Penney | 4 |
| Regis Salons | 9 | Levi Strauss | 6 | Silverado Resort & Spa | 4 |

*Source: Burning Glass*

# Educational Supply

**Table 7. Number of Awards (Certificates and Degrees) Conferred by Postsecondary Institutions and Headcount on 3007.00 Cosmetology and Barbering or on CIPs 12.0401 Cosmetology/Cosmetologist, General; 12.0407 Hair Styling/Stylist and Hair Design; 12.0413 Cosmetology, Barber/Styling, and Nail Instructor; 12.0410 Nail Technician/Specialist and Manicurist**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| College | Sub-Region | CC Head-count | Associate Degrees | Certificates or Other Credit Awards | Total Awards |
| Gavilan | Silicon Valley | 100 | 3 | 24 | 27 |
| Laney | East Bay | 241 | 5 | 37 | 42 |
| San Jose City | Silicon Valley | 270 | 9 | 112 | 121 |
| San Mateo | Mid-Peninsula | 101 | 3 | 44 | 47 |
| Skyline | North Bay | 199 | 2 | 48 | 50 |
| Solano | North Bay | 58 | 3 | 19 | 22 |
| Blake Austin College | North Bay | n/a | 0 | 38 | 38 |
| Hinton Barber and Beauty College | North Bay | n/a | 0 | 1 | 1 |
| LeMelange Academy of Hair | North Bay | n/a | 0 | 27 | 27 |
| Lytles Redwood Empire Beauty College Inc. | North Bay | n/a | 0 | 64 | 64 |
| Milan Institute of Cosmetology-Fairfield | North Bay | n/a | 0 | 39 | 39 |
| **Total All in North Bay** |  |  | **3** | **188** | **191** |
| **Total All In Bay Region** |  |  | **25** | **1,180** | **1,205** |

# *Source: IPEDS, Data Mart and Launchboard*

NOTE: Headcount of students who took one or more courses is for 2015-16. Associate degrees and Certificates for Community Colleges is the annual average for 2014-17. For the other postsecondary institutes, the annual average is for 2013-16.

There are 15 other postsecondary institutes in the other sub-regions of the Bay accounting for the other postsecondary awards. Only those in North Bay are listed in Table 7.

# Student Outcomes

The success of students on TOP code 3007.00 Cosmetology and Barbering is quite good especially when you compare the outcomes of students in the Bay Region to outcomes of students in other regions in the state for 2014-15.

For Solano students, the results are a bit mixed. Compared to state medians, Solano fared better for all outcomes metrics (except for median annual salary in 2014-15). Compared to the region, Solano had a slightly higher percent of students earning a living wage (by just 1%) and a higher median percentage wage gain (88% vs 57%). However, the percent of students employed four quarters after exit was lower than the region by 10% and median annual wages were significantly lower by 68% in 2014-15.

**3007.00 Cosmetology and Barbering in Bay Region community colleges:**

* 70% of 375 students were employed four quarters after exit in 2014-15 in the Bay Region. At Solano, 60% of 30 students for 2014-15 were employed four quarters after exit, which is lower than the Bay region. The state median is 51%.
* Median annual earnings for all exiters was $15,841 in 2014-15 (highest experienced by students in any region on that TOP code) in the Bay Region. For Solano students, the median annual earnings was 68% lower at just $9,437 in 2014-15. However, for prior years, the median annual earnings were closer to the regional wages.
* Those students in 2014-15 experienced a median wage gain of 57% in the Bay Region. At Solano the median wage gain was higher than in the Bay region at 88% for 2014-15. The state median is 43%.
* However, only 13% were making a living wage in 2014-15 in the Bay Region. Solano does not have data for 2014-15, but for 2013-14 the rate was 14%. The state median for this TOP code is just 10%. Santa Monica has the highest in the state at 23%.

It is important to note that matching the EDD data set to our student data set to produce the outcomes in the Launchboard does not capture self-employment or full-time vs. part-time status. The 2015-16 Employment Outcomes Survey (EOS) has very little data on this TOP code for the Bay region but does show 20% (five out of 25 students) indicating that they are self-employed and 28% working part-time (seven out of 25 students). The wages shown in the Launchboard may be low since self-employed workers are not included and since exiting students may be working part-time. Capturing more data over time with the EOS survey will allow for a better analysis of how this program prepares students for career pathways that lead to a living wage.

# Skill & Certifications

Table 8 provides the top skills and certifications that appear to be frequently listed in the job advertisements for Cosmetology Occupations over the latest 12-month period.

Note: 49% of records have been excluded because they do not include a skill. As a result, the chart below may not be representative of the full sample.

**Table 8. Top Skills & Certifications for Cosmetology in the Bay Region (Nov 2016 – Oct 2017)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Skill** | **Latest 12 Mos. Postings** | **Skill** | **Latest 12 Mos. Postings** | **Certification** | **Latest 12 Mos. Postings** |
| Sales | 147 | Client Base Retention | 70 | Cosmetology License | 122 |
| Sales Goals | 142 | Merchandising | 69 | Licensed Barber | 42 |
| Retail Setting | 127 | Inventory Management | 64 | Certified Hair Stylist | 34 |
| Product Knowledge | 106 | Budgeting | 60 | Manicurist Certification | 12 |
| Customer Service | 103 | Workshops | 59 | First Aid CPR AED | 9 |
| Guest Services | 102 | Prescription Writing | 52 |  |  |
| Scheduling | 86 | Promotional Materials | 52 |  |  |
| Loss Prevention | 85 | Visual Merchandising | 51 |  |  |
| Hair Styling | 73 | Description & Demonstration of Products | 48 |  |  |
| Retail Sales | 71 |  |  |
| Cash Handling | 70 | Supervisory Skills | 45 |  |  |

*Source: Burning Glass*

**Table 9. Education Requirements in Bay Region**

Note: 84% of records have been excluded because they do not include a degree level. As a result, the chart below may not be representative of the full sample.

|  |  |  |
| --- | --- | --- |
| **Education (minimum advertised)** | **Latest 12 Mos. Postings** | **% of Total Postings indicating a degree level** |
| High school or vocational training | 115 | 87% |
| Associate Degree | 3 | 3% |
| Bachelor’s Degree or higher | 14 | 10% |

*Source: Burning Glass*

# Methodology

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

# Sources

O\*Net Online

Labor Insight/Jobs (Burning Glass)

Economic Modeling Specialists International (EMSI)

CTE LaunchBoard [www.calpassplus.org/Launchboard/](http://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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