

**SECTOR
ANALYSIS &
STRATEGY**



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**CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH**

TODAY'S PURPOSE

- Introduce the report
- Share approach and methodology
- Provide preliminary findings

WE ARE NOT DECIDING ANYTHING TODAY

TIMELINE

Dates	Activities
Feb-Mar 2021	Region votes on industry & occupational metrics
Mar 2021	COE conducts analysis basis on metrics selected by the region
Apr-May 2021	COE presents the analysis to the region (e.g., WDC, ROC, Deans Council) for feedback COE revises analysis based on feedback
Jun 4, 2021	Regional Consortium and COE host a townhall to discuss community colleges' role in each sector
Jun 30, 2021	COE captures recommendations in final report

11 SECTORS - CHANCELLOR'S OFFICE

- 1. Advanced Manufacturing**
- 2. Advanced Transportation, and Logistics**
- 3. Agriculture, Water, and Environmental Tech**
- 4. Business and Entrepreneurship**
- 5. Education and Human Development**
- 6. Energy, Construction, and Utilities**
- 7. Health**
- 8. ICT and Digital Media**
- 9. Life Sciences and Biotechnology**
- 10. Public Safety and Government**
- 11. Retail, Hospitality, and Tourism**

TWO WAYS TO DEFINE SECTORS

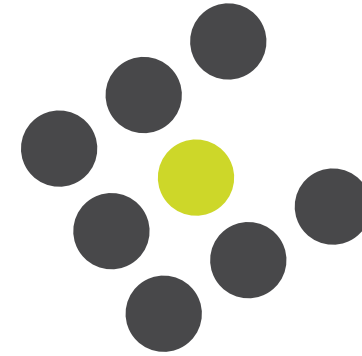
**Manufacturing
(NAICS 31-33)**

**Health
(NAICS 62)**

Business and Financial Occupations (SOC 13-0000)



**METRICS
ANALYZED**

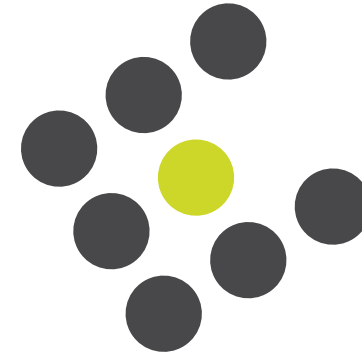


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- A. Entry-level wages at or above the living wage**
- B. Median wages at or above the living wage**
- C. Annual job openings (labor market demand)**
- D. # of businesses/establishments in the region**
- E. # of jobs in 2020**
- F. % and # jobs change (2010-2020)**
- G. Jobs multiplier**
- H. % of job concentration compared to nation**
- I. Earnings across the whole sector**
- J. % of workers nearing retirement age**
- K. Automation index**

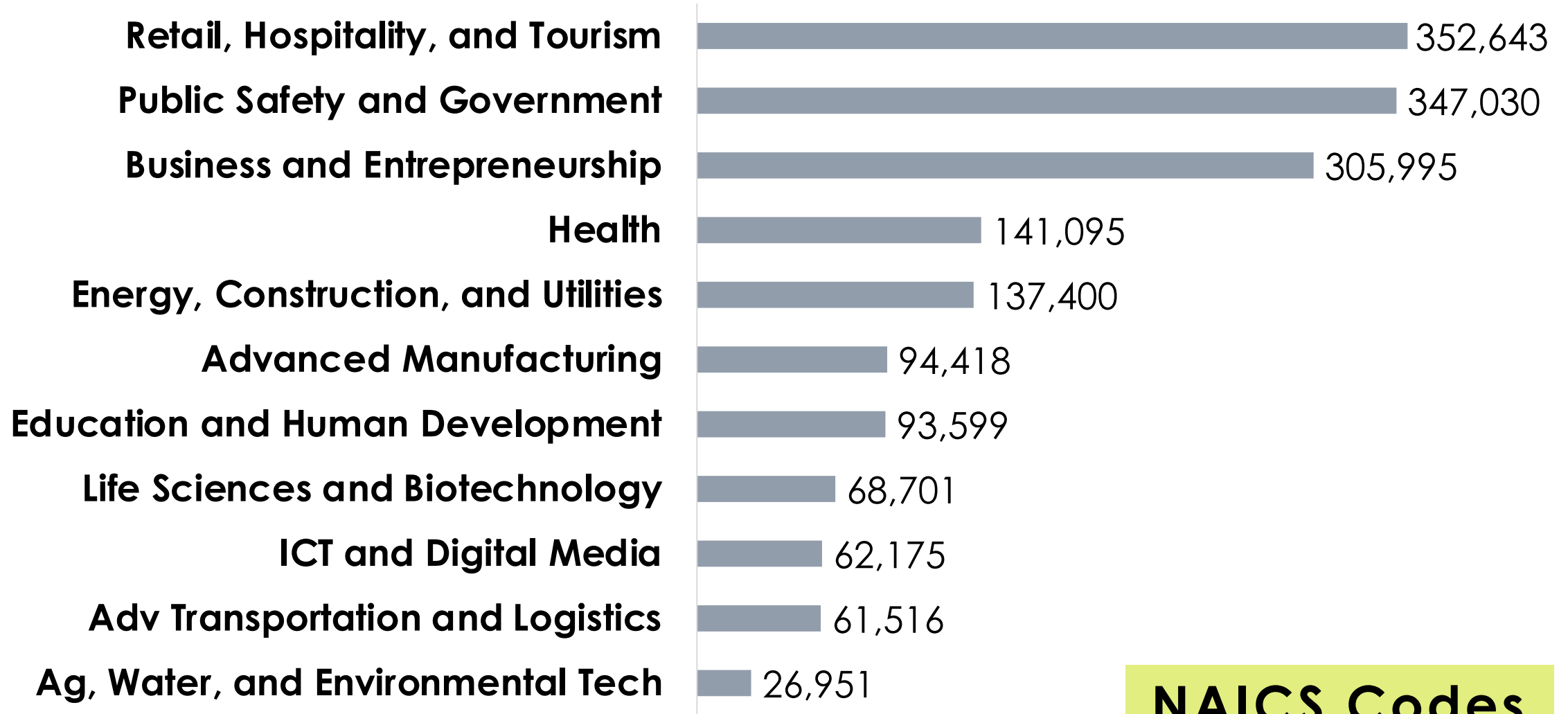
ANALYZED
BOTH % AND #
(EXAMPLES)



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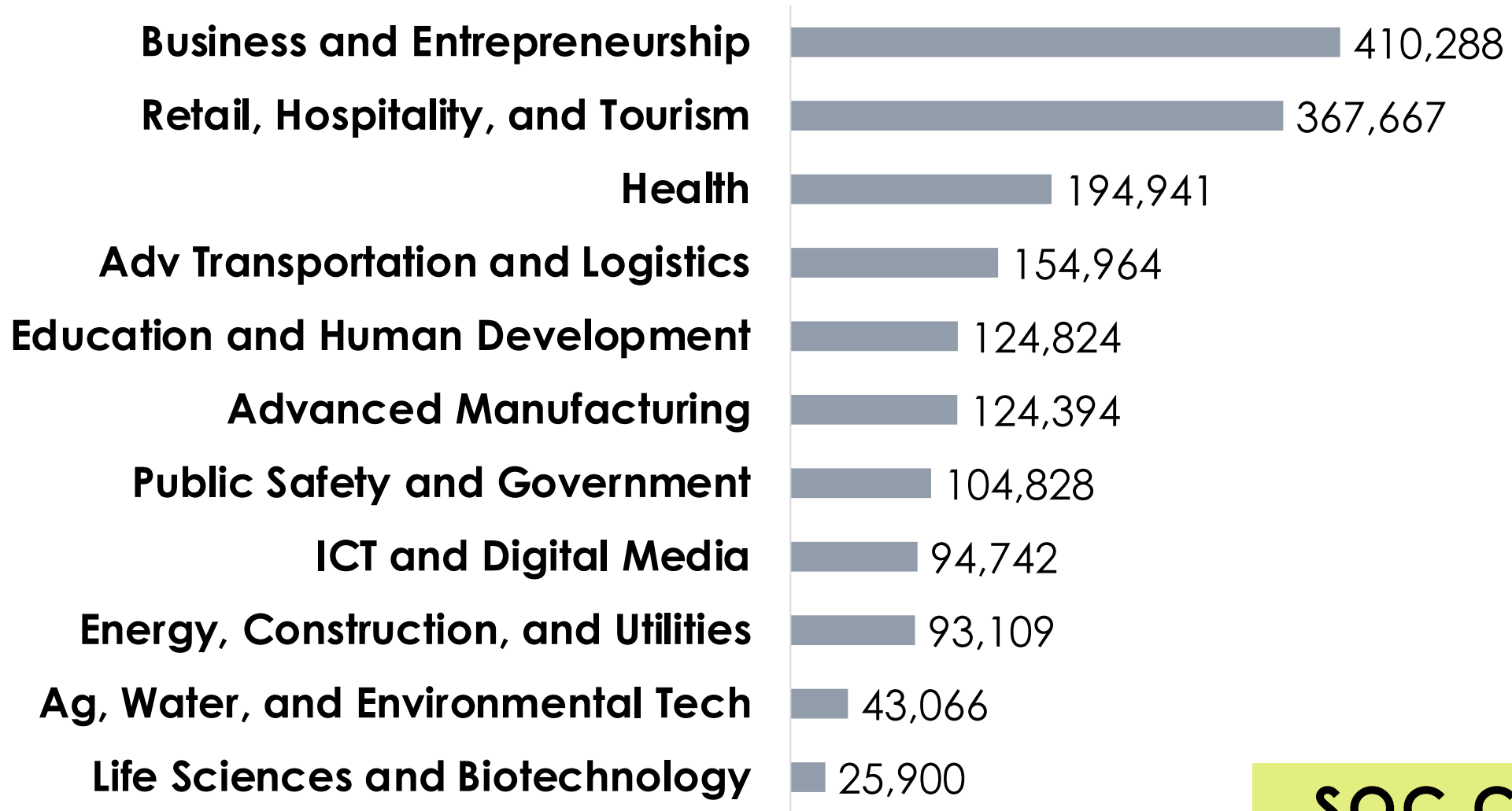
**CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH**

JOBS BY SECTOR (2020)



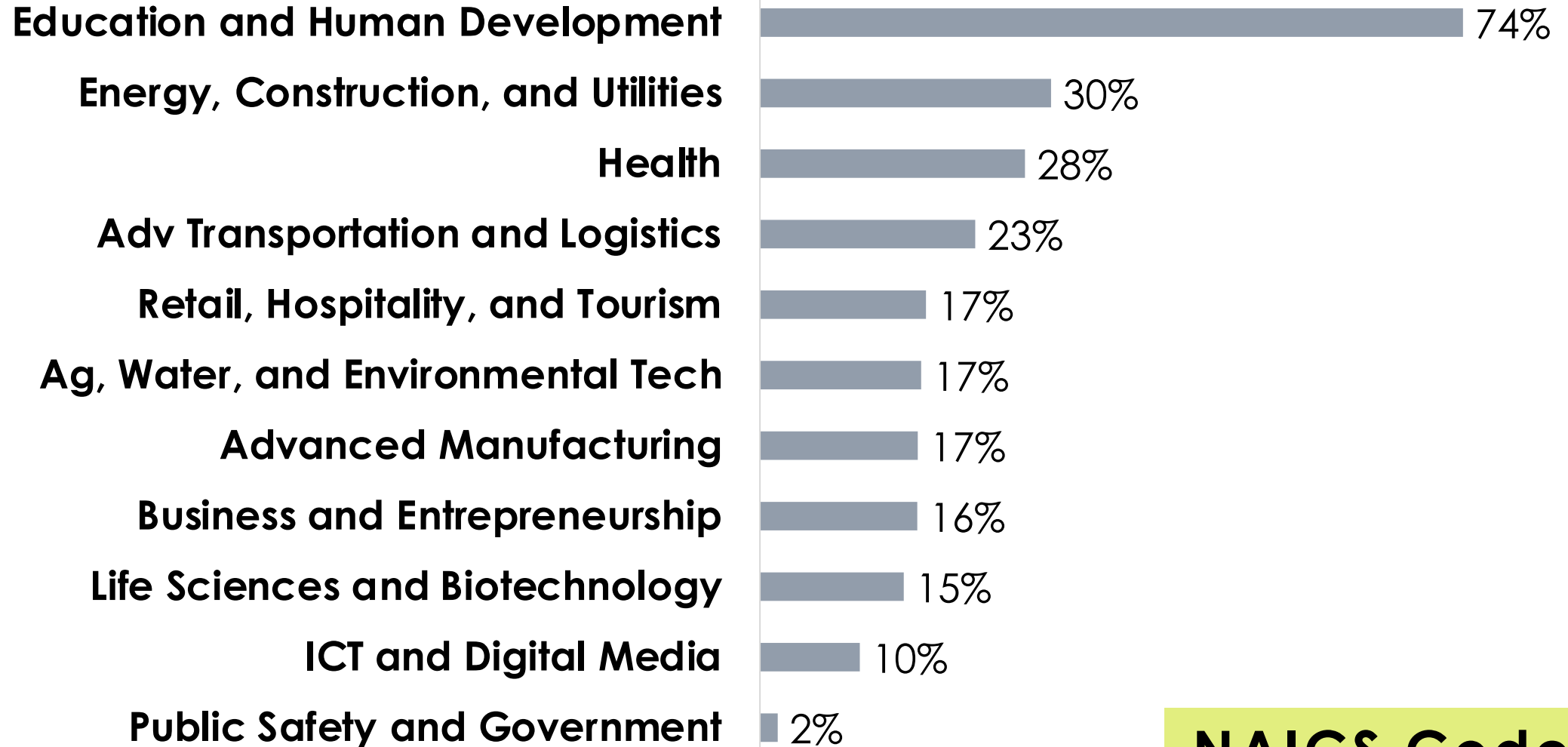
NAICS Codes

JOBS BY SECTOR (2020)



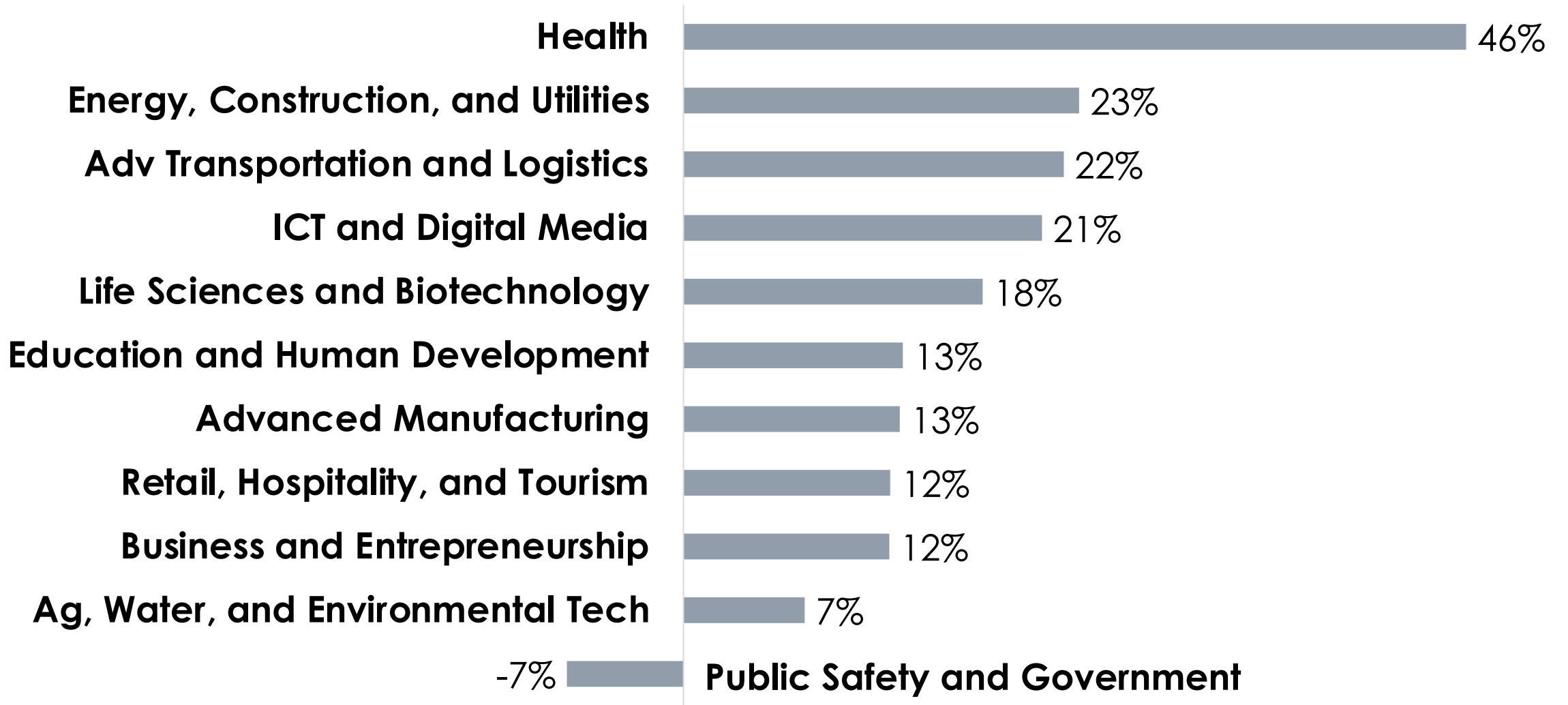
SOC Codes

% JOBS CHANGE BY SECTOR (2010-2020)



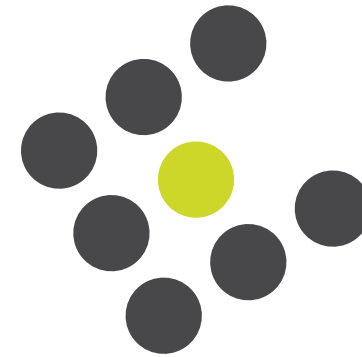
NAICS Codes

% JOBS CHANGE BY SECTOR (2010-2020)



SOC Codes

**15 EXHIBITS FOR
EACH AVAILABLE
METRIC**



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REPORT HAS 3 PARTS

- 1. Analysis by NAICS codes**
- 2. Analysis by SOC codes**
- 3. Sector Rankings**

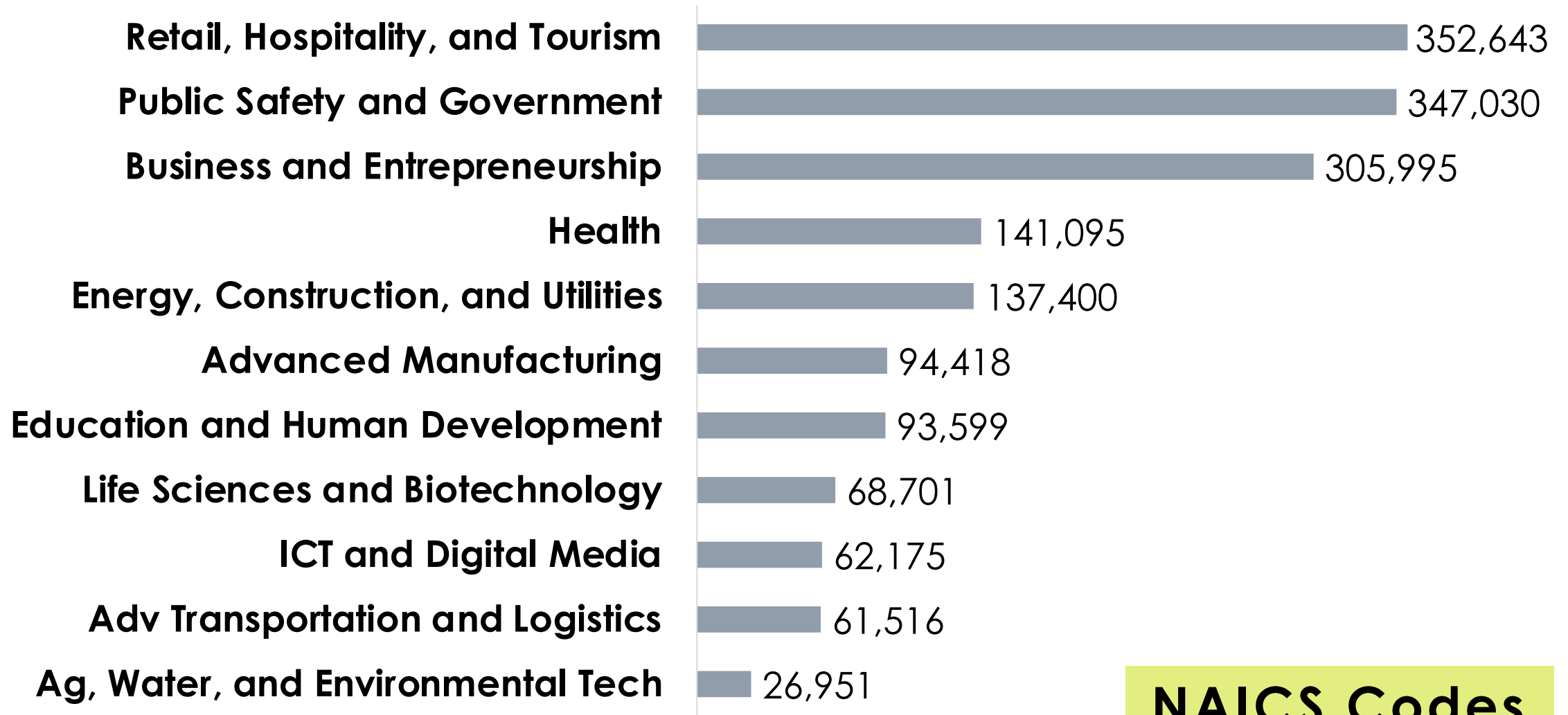
**ASSIGNED
POINTS BASED
ON RANKING
(EXAMPLES)**



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JOBS BY SECTOR (2020)



NAICS Codes

RANKING METHOD #1 (TOP 5 SECTORS)

# Points	Sector
1	Retail, Hospitality, and Tourism
1	Public Safety and Government
1	Business and Entrepreneurship
1	Health
1	Energy, Construction, and Utilities
0	Advanced Manufacturing
0	Education and Human Development
0	Life Sciences and Biotechnology
0	ICT and Digital Media
0	Advanced Transportation and Logistics
0	Agriculture, Water, and Environmental Technologies

RANKING METHOD #2 (# POINTS BY ORDER)

# Points	Sector
11	Retail, Hospitality, and Tourism
10	Public Safety and Government
9	Business and Entrepreneurship
8	Health
7	Energy, Construction, and Utilities
6	Advanced Manufacturing
5	Education and Human Development
4	Life Sciences and Biotechnology
3	ICT and Digital Media
2	Advanced Transportation and Logistics
1	Agriculture, Water, and Environmental Technologies

**THIS SHOULD *NOT*
BE THE SOLE BASIS
FOR DECISION
MAKING**



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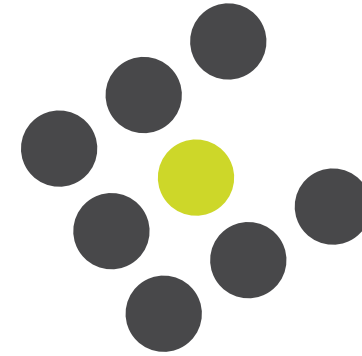
RANKING BASED ON TOP 5 SECTORS PER METRIC

Exhibit #	Metric	AM	ATL	AWET	BE	EHD	ECU	H	ICT	LS	PS	RHT
Part I: NAICS Analysis	1. # of Jobs (2020)				•		•	•			•	•
	2. % Job Change (2010-2020)		•			•	•	•				•
	3. Average Earnings by Job (2020)	•					•		•	•	•	
	4. % Change in Average Earnings by Job (2010-2020)			•	•				•	•	•	
	5. # of Establishments (2020)				•	•	•	•				•
	6. % Change in Establishments (2013-2020)					•	•		•	•	•	
	7. % Workers Age 55+ (2020)	•		•	•	•	•					
	8. Jobs Multipliers (2020)	•			•		•	•	•			
Part II: SOC Analysis	9. # of Jobs (2020)		•		•	•		•				•
	10. % Job Change (2010-2020)		•				•	•	•	•		
	11. Average Entry-Level Hourly Earnings (2020)				•	•		•		•	•	
	12. Average Median Hourly Earnings (2020)				•			•	•	•	•	
	13. % of Workers 55+ (2020)	•		•	•	•		•				
	14. Location Quotient				•	•			•	•		•
	15. Average Automation Index				•	•		•	•	•		
# Points		4	3	3	11	9	8	10	8	8	6	5

RANKING BASED ON ORDER IN METRIC

Exhibit #	Metric	AM	ATL	AWET	BE	EHD	ECU	H	ICT	LS	PS	RHT
Part I: NAICS Analysis	1. # of Jobs (2020)	6	2	1	9	5	7	8	3	4	10	11
	2. % Job Change (2010-2020)	5	8	6	4	11	10	9	2	3	1	7
	3. Average Earnings by Job (2020)	9	4	3	5	1	7	6	10	11	8	2
	4. % Change in Average Earnings by Job (2010-2020)	3	4	9	8	1	6	2	10	11	7	5
	5. # of Establishments (2020)	4	6	1	11	10	8	7	5	3	2	9
	6. % Change in Establishments (2013-2020)	3	4	2	6	10	8	5	9	7	11	1
	7. % Workers Age 55+ (2020)	10	6	9	7	11	8	5	3	4	1	2
	8. Jobs Multipliers (2020)	7	3	2	10	1	8	9	11	5	4	6
Part II: SOC Analysis	9. # of Jobs (2020)	6	8	2	11	7	3	9	4	1	5	10
	10. % Job Change (2010-2020)	5	9	2	3	6	10	11	8	7	1	4
	11. Average Entry-Level Hourly Earnings (2020)	2	5	3	8	7	4	11	6	10	9	1
	12. Average Median Hourly Earnings (2020)	2	5	3	7	6	4	11	8	10	9	1
	13. % of Workers 55+ (2020)	10	6	7	11	8	5	9	2	4	1	3
	14. Location Quotient	1	3	2	8	7	6	4	9	11	5	10
	15. Average Automation Index	2	4	5	7	11	1	10	8	9	6	3
# Points		75	77	57	115	102	95	116	98	100	80	75

**NO MATTER HOW
WE “SLICE AND
DICE” THE DATA,
WE *HAVE* TO HAVE
A CONVERSATION**



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SECTOR ANALYSIS

A labor market analysis of industry sectors in San Diego County

DRAFT: April 2021

DRAFT
REPORT



Sector Rankings Based on Top 5 Sectors by Metric

Rank	Sector	Points
1.	Business and Entrepreneurship	11
2.	Health	10
3.	Education and Human Development	9
4.	Energy, Construction, and Utilities	8
4.	ICT and Digital Media	8
4.	Life Sciences and Biotechnology	8
5.	Public Safety and Government	6
6.	Retail, Hospitality, and Tourism	5
7.	Advanced Manufacturing	4
8.	Advanced Transportation and Logistics	3
8.	Agriculture, Water, and Environmental Technologies	3

Sector Rankings Based on Order in Metric

Rank	Sector	Points
1.	Health	116
2.	Business and Entrepreneurship	115
3.	Education and Human Development	102
4.	Life Sciences and Biotechnology	100
5.	ICT and Digital Media	98
6.	Energy, Construction, and Utilities	95
7.	Public Safety and Government	80
8.	Advanced Manufacturing	75
8.	Retail, Hospitality, and Tourism	75
9.	Advanced Transportation and Logistics	77
10.	Agriculture, Water, and Environmental Technologies	57

TIMELINE

Dates	Activities
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Mar 2021	COE conducts analysis basis on metrics selected by the region
Apr-May 2021	COE presents the analysis to the region (e.g., WDC, ROC, Deans Council) for feedback COE revises analysis based on feedback
Jun 4, 2021	Regional Consortium and COE host a townhall to discuss community colleges' role in each sector
Jun 30, 2021	COE captures recommendations in final report

ON JUNE 4...

We'll use the report to discuss strengths, weaknesses, and opportunities for the region's colleges (semi-SWOT analysis)