

RETAIL, HOSPITALITY, & TOURISM



Orange County Sector Analysis Project

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Prepared by:
Orange County Center of Excellence
for Labor Market Research

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Orange County Community Colleges

RETAIL, HOSPITALITY, AND TOURISM

Demand and Supply Analysis: Orange County

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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 college/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.

INTRODUCTION

This sector brief is a product of the Orange County Sector Analysis Project. It provides information about the Retail, Hospitality, and Tourism sector in Orange County, one of Orange County's six priority sectors; it compares labor market demand with educational program supply for middle-skill jobs and provides qualitative information from experts in the field. Orange County community colleges could use the information in this report for strategic planning and discussions about program development, career pathways work, sector strategies, noncredit-to-credit pipelines, apprenticeship programs, and work-based learning opportunities.

All of the Orange County Sector Analysis Project briefs began with quantitative labor market demand and supply analysis; however, they also include qualitative information derived from the project's focus group discussions. Between July and August 2019, the Orange County Center of Excellence for Labor Market Research (COE) hosted a total of 12 sector-specific focus groups with regional stakeholders, including faculty and deans, as well as regional and state directors for employer engagement. Two of these focus groups were specific to the Retail, Hospitality, and Tourism sector. The objectives of the focus groups were to identify labor market supply gaps (supply gaps) in middle-skill jobs; understand where programs exist or do not exist to fill in the supply gaps; and discuss how Orange County's community colleges could close the supply gaps. Focus group participants reviewed the demand and supply analysis prior to meeting and provided intelligence regarding how they are working to close supply gaps as well as the challenges they encounter in their programs; this valuable information could not be captured via traditional labor market research methods. The COE recorded then analyzed these discussions which resulted in the "Focus Group Insights" sections throughout this brief, supplementing traditional, quantitative labor market data with important, qualitative information.

Middle-Skill Jobs and Living Wage Introduction

In this brief, middle-skill jobs include: all occupations that require an educational requirement of some college, associate degree or apprenticeship; all occupations that require a bachelor's degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or all occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training.

In this brief, top middle-skill jobs are defined as jobs that have both the most labor market demand (annual job openings) and entry-level wages at or above the California Family Needs Calculator¹ (commonly known as a "living wage"). The living wage is the hourly wage that a single adult needs to earn in order to meet basic needs in Orange County, and is currently \$17.39 per hour. The living wage is defined by the California Family Needs Calculator, which calculates the income necessary to cover costs including housing, food, transportation, health care, and other basic necessities.

Entry-level wage is defined as the 25th percentile hourly wage, which means that 25% of all workers in that occupation earn equal to or below this amount. Percentile wages represent the distribution of wages for each occupation. Generally, workers with minimal education and experience can expect to earn wages near the 10th percentile. With the additional education and training students receive in community college programs, they are more likely to earn wages at the 25th percentile, rather than the 10th percentile. Generally, with even more education and experience, students could expect to progress and earn the median wage, which is defined as the 50th percentile hourly wage.

Demand Introduction

For the purpose of this report, labor market demand is determined by the number of annual job openings employers expect to fill due to job growth and employee turnover between 2018 and 2023. Job growth is when an employer experiences increased demand for products and hires new employees to increase production, while employee turnover is when an employer hires replacement workers for employees who leave the workforce or change occupations.

Supply Introduction

Supply is determined by the average annual-number of related awards (e.g., certificates, degrees) generated between 2015 and 2017 by the region's community colleges and other educational institutions (e.g., private providers) for the purpose of this

¹ <https://insightcced.org/2018-family-needs-calculator/>

report. However, it should be noted that a student may earn more than one award; therefore, supply may be overestimated for certain occupations.

Whether or not there is a supply gap is determined by the difference between the demand and supply. The methodology regarding how these numbers are calculated is described in Appendix A.

FOCUS GROUP INSIGHTS

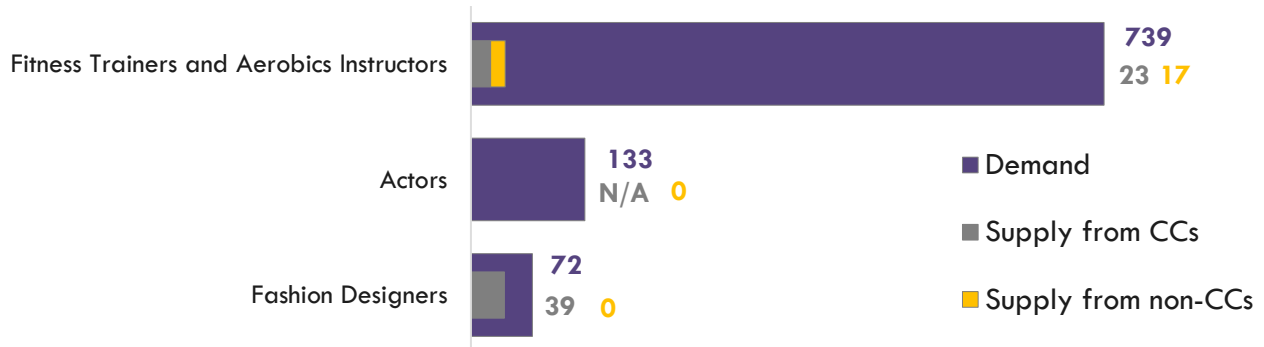
The Retail, Hospitality, and Tourism sector was split into two focus groups that were held on different days and included a total of eight faculty members and four administrators from eight institutions – six of the seven community colleges, and one noncredit school –that offered Retail, Hospitality, and Tourism programs in Orange County between 2015 and 2017. Both the statewide and regional director for employer engagement also attended one of the two focus groups.

Focus group participants identified several data limitations, challenges in expanding programs, and other issues that were common across multiple sectors. The cross-sector, common themes are expanded on and explained in further detail in the standalone Orange County Sector Analysis Project Executive Summary report. Focus group participants also reported on limitations and challenges that were unique to the Retail, Hospitality, and Tourism sector. This sector-specific information is highlighted throughout this report in the Focus Group Insights and the Focus Group Insights – The Big Picture sections.

RETAIL, HOSPITALITY, AND TOURISM TOP MIDDLE-SKILL JOBS

This section compares Orange County’s labor market demand for the top middle-skill jobs in Retail, Hospitality, and Tourism with program supply from the region’s community colleges and non-community college providers (Exhibit 1). As seen in Exhibit 2, the entry-level wages² for these top middle-skill jobs are higher than the \$17.39 per hour living wage. Descriptions for each occupational title can be found in Appendix B. Detailed supply and demand data analyzed for each occupation, including supply numbers by institutions is included in Appendix C.

Exhibit 1. Retail, Hospitality, and Tourism Top Middle-Skill Jobs in Orange County: Labor Market Demand vs. Program Supply



(Please note: N/A indicates that no community college program reported awards for this occupation or no community college program is available for this occupation.)

FOCUS GROUP INSIGHTS

Skills and Certifications

Focus group participants noted that the community colleges provide numerous courses that are designed to add a skill or set of skills, but do not fully train for a specific occupation. Since this report uses awards as the measurement for supply, these courses are not captured in the data in this report. Focus group participants also noted that, in their experience, employers tend to higher based on skills rather than the degree or certificate students earn.

“[Employers] are looking for a specific skill. You could have an associate’s degree, but if you don’t have that skill, they would rather go with someone with that specific skill.”
- Fullerton College Faculty Member

Certifications are another way to demonstrate skill attainment according to focus group participants. Faculty members indicated that they train students for certifications including Western Association of Food Chains (WAFC) Retail Management, ServSafe Food Handler and Manager, Council for Interior Design Qualification (CDIQ), FAA Flight Attendant Certification, Travel Agents Proficiency (TAP), and Personal Trainer (Sabre). At least one college, Orange Coast, offers advanced certificate programs in Culinary Arts and Baking/Pastry that are accredited by the American Culinary Federation (ACF). Students completing these certificates can also earn ACF Certification upon graduation.

Flight Attendants and Fashion Occupations

One faculty member pointed out that supply and demand data for Flight Attendants (SOC code 53-2031) was not included in the supply and demand analysis. Because this occupation had less than 50 annual job openings in Orange County, it did not meet the threshold to be included, as defined in the methodology in Appendix A. Another faculty member said that the demand for Fashion Designers (SOC code 27-1022) seemed low. There is a small demand for both these occupations in Orange County, but demand for these occupations is much larger in Los Angeles County. While this report focuses on Orange

² In this report, entry-level wage is defined as the 25th percentile hourly wage, which means that 25% of all workers in the field earn equal to or below this amount. Generally, workers with less experience earn lower wages.

County, colleges should keep in mind that students live and work in surrounding counties where there may be greater demand for certain occupations.

Low Completion Numbers

According to the demand and supply exhibits in this brief, the community colleges in Orange County are undersupplying for both top middle-skill jobs and jobs that have entry-level wages below the California Family Needs Calculator (CFNC), but median wages above the CFNC within this sector, as shown in the next section of this brief. According to the CCCCO’s dashboard tool, LaunchBoard³, 5,632 (unduplicated) students took one or more courses in Retail, Hospitality, and Tourism programs in the 2016-17 program year in Orange County. However, in that same year, only 279 students earned a certificate or degree.

One reason for low completion numbers that some faculty members cited is that there is a high degree of turnover, particularly in retail and culinary, in this sector. Employers need workers to fill the high demand for jobs in these areas and it is relatively easy for students to find a job in the current labor market.

Other faculty members noted that it is common for students to find employment before completing their program, but upfront counseling to help students understand the importance of completing has helped increase persistence rates. Additionally, Orange Coast and Saddleback colleges have added a work experience component towards the end of their culinary and tourism programs to incentivize students to complete the program.

Exhibit 2. Retail, Hospitality, and Tourism Top Middle-Skill Jobs in Orange County: Entry-Level and Median Wages

SOC Code	SOC (Occupational) Title	Demand (Annual Openings)	Entry-Level Wage (25 th Percentile)	Median Wage
39-9031	Fitness Trainers and Aerobics Instructors	739	\$17.45	\$20.97
27-2011	Actors	133	\$20.91	\$22.94
27-1022	Fashion Designers	72	\$22.61	\$29.41

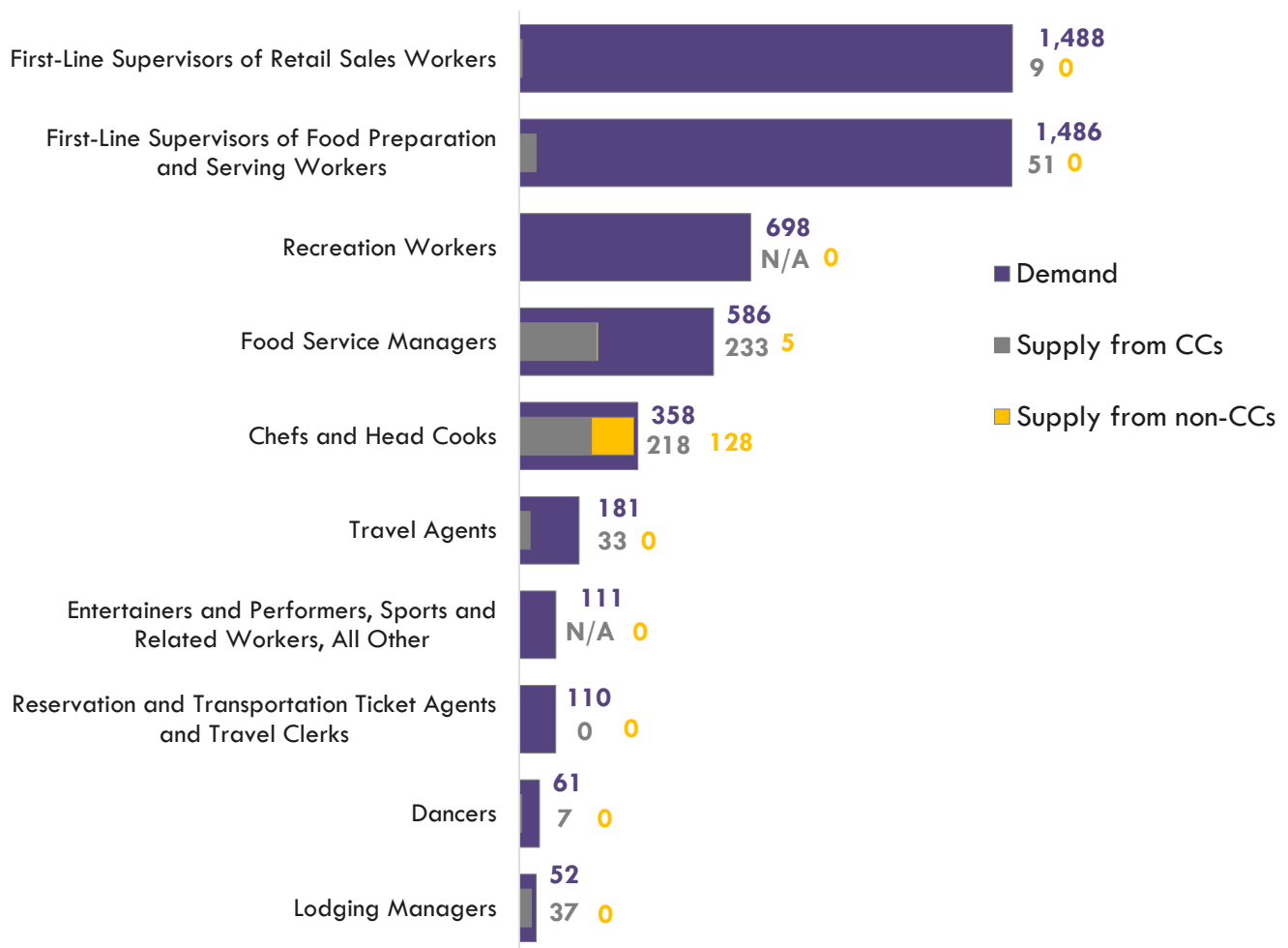
³ <https://www.calpassplus.org/LaunchBoard/Home.aspx>

RETAIL, HOSPITALITY, AND TOURISM MIDDLE-SKILL JOBS WITH ENTRY-LEVEL WAGES BELOW CALIFORNIA FAMILY NEEDS CALCULATOR

While it is important to understand which top middle-skill jobs have opportunities for increased program supply, it is also important to consider middle-skill occupations that have entry-level wages below the California Family Needs Calculator but median wages above it. Since wages generally increase with additional experience and training, students could potentially earn self-sustaining wages with additional apprenticeship or work-based learning opportunities.

As seen in Exhibit 3, middle-skill Retail, Hospitality, and Tourism jobs with entry-level earnings below the California Family Needs Calculator have a significant number of annual job openings (labor market demand).

Exhibit 3. Retail, Hospitality, and Tourism Middle-Skill Jobs with Entry-Level Wages Below the California Family Needs Calculator in Orange County: Labor Market Demand vs. Program Supply



(Please note: N/A indicates that no community college program reported awards for this occupation or no community college program is available for this occupation.)

While these occupations have entry-level wages below the California Family Needs Calculator of \$17.39 per hour, occupations such as Food Service Managers; Chefs and Head Cooks; Travel Agents; Entertainers and Performers, Sports and Related Workers, All Other; Dancers; and Lodging Managers have median wages higher than the California Family Needs Calculator as denoted via the gray shading in Exhibit 4.

Exhibit 4. Retail, Hospitality, and Tourism Middle-Skill Jobs with Entry-Level Earnings Below the California Family Needs Calculator in Orange County: Entry-Level and Median Wages

SOC Code	SOC (Occupational) Title	Demand (Annual Openings)	Entry-Level Wage (25 th Percentile)	Median Wage
41-1011	First-Line Supervisors of Retail Sales Workers	1,488	\$13.15	\$16.63
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	1,486	\$12.60	\$15.01
39-9032	Recreation Workers	698	\$11.17	\$12.35
11-9051	Food Service Managers	586	\$13.24	\$20.71
35-1011	Chefs and Head Cooks	358	\$15.96	\$21.55
41-3041	Travel Agents	181	\$16.43	\$20.30
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	111	\$14.48	\$19.58
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks	110	\$13.71	\$17.09
27-2031	Dancers	61	\$16.93	\$19.70
11-9081	Lodging Managers	52	\$15.88	\$25.38

FOCUS GROUP INSIGHTS

High Demand, Low Wages

Focus group participants acknowledged that there is high demand for several occupations, but many of them have low entry-level wages. However, focus group participants agreed that they are good pathway occupations that would help students gain experience for future advancement, despite the low wages. An administrator from Saddleback College suggested that current credit programs for these low wage occupations could be restructured and moved to noncredit programs to help create noncredit-to-credit pipelines. Both Saddleback and Santa Ana colleges are currently exploring this option.

Wages for Chefs and Head Cooks

Focus group participants said that wages for the Chefs and Head Cooks occupation appeared low and that, in their experience, wages were much higher. While standardized occupational titles are useful for classifying, collecting, and disseminating data in general, they do not always provide a complete picture of the demand and wages for specific job titles. The Chefs and Head Cooks occupation includes several roles and titles, ranging from line cook, head cook, to executive chef. Entry-level positions that typically require less experience, like line cook, have low wages and bring the entry-level and median wages down for this occupation. Focus group participants said that colleges should train students on wage expectations for these different roles and how to progress from entry-level to higher-level positions.

Supply for Chefs and Head Cooks

A faculty member pointed out that at least one non-community college institution, Argosy University, has closed and will not be contributing to the supply numbers in the future. Since this report focuses on a historical time period, Argosy University is counted in the supply numbers and conferred an average of 124 awards annually for Chefs and Head Cooks from 2015 to 2017. Because Argosy will no longer provide training in the future, the supply for Chefs and Head Cooks will likely fall to 234 awards annually which may change the “Supply Met” classification to “Supply Gap” since the demand of 358 annual openings will no longer be met.

FOCUS GROUP INSIGHTS – THE BIG PICTURE

Focus group participants addressed other issues and challenges that cannot be captured by traditional labor market information and provided insight on the tactics colleges and employers are currently using to address supply gaps in the Retail, Hospitality, and Tourism sector.

How Employers are Filling Supply Gaps

Focus group participants across all sectors reported that employers recruit heavily at four-year colleges for potential workers, even if a position does not require a bachelor's degree. In the Retail, Hospitality, and Tourism focus group, participants noted the employers in this sector primarily rely on in-house training programs, such as the Disney University program, to fill supply gaps. While in-house program development may be possible for some large companies like Disney, focus group participants said that this practice is not necessarily widespread. They noted that hotels have only recently started strengthening their internal training programs. Faculty members also remarked that employers hold onsite job fairs as well as attend on-campus job fairs at the community colleges. Additionally, focus group participants shared that some employers have begun paying higher wages and/or offering bonuses in order to attract more workers.

“Many students get jobs with skills or a certificate. But in the job listing itself, what they [employers] are listing is a bachelor’s degree.”

– Orange Coast College Faculty Member

Creative Ways Community Colleges are Offering Programs

Focus group participants discussed several creative ways they are offering programs and some of the challenges they face when developing new ways to offer their programs:

- For many Orange County community colleges, their retail management, tourism, and fashion courses are now offered exclusively online in order to accommodate working students. Faculty and administrators noted that their all-online classes tend to fill faster than hybrid or in-person courses.
- At Saddleback College, one faculty member said that they invite former culinary students back to class to discuss their experiences and give advice to current students.
- Santa Ana College has created dual enrollment culinary courses for students enrolled in Santa Ana Unified and Orange Unified school districts so that high school students can earn college credit.

Challenges in Expanding Programs

Focus group participants identified several challenges to expanding programs in the Retail, Hospitality, and Tourism sector. Many of these challenges, including the lack of dedicated lab space, difficulty hiring faculty and staff, and high costs for equipment, cut across all sectors. Historically, a challenge unique to this sector is the competition from private culinary schools. However, faculty members noted that a number of private culinary schools have recently closed, which may provide an opportunity for community colleges to expand their programs.

New Programs

Faculty and administrators identified over a dozen new programs that they are either in the process of creating or plan to create in the near future. Several of these new programs will address new and emerging areas such as Farm-to-Table and environmental sustainability in both the culinary and fashion fields. Other programs will focus on the business and management side of hospitality and culinary and a fashion apprenticeship.

KEY FINDINGS: RETAIL, HOSPITALITY, AND TOURISM

Based on the demand and supply data, as well as the focus group insights analyzed in this brief, the COE identified the following key research findings and recommendations:

Demand and Supply

6,075

annual job openings
(labor market demand)

800

average annual program awards
(labor market supply)

5,275

supply gap (number of
awards needed to close the gap)

Focus Group Key Findings and Recommendations

Key Finding	Recommendation
<p>1. Completion numbers are low, but some colleges have found solutions to increase completion: In the 2016-17 academic year, 5,632 students took at least one Retail, Hospitality, and Tourism course in Orange County, but only 279 students earned a degree or certificate. There tends to be high turnover of workers in this sector, so it is relatively easy for students to find a job before completing. However, upfront counseling to help students understand the importance and value of completing has helped increase persistence rates at some colleges.</p>	<p>1. To increase completion rates of students in Retail, Hospitality, and Tourism programs colleges could focus on counseling efforts early in a student's course progression to help them understand the value of a degree or certificate. Colleges could also add a work experience component, such as an internship of work-based learning opportunity, towards the end of their programs to incentivize students to complete their degree or certificate.</p>
<p>2. Several Retail, Hospitality, and Tourism occupations are in high demand, but pay low wages: Even though there is a significant need for occupations such as First-Line Supervisors of Retail Workers and First-Line Supervisors of Food Preparation and Serving Workers, entry-level wages for these occupations are below the living-wage for one adult in Orange County.</p>	<p>2. To help students move into occupations with higher wages, colleges could consider creating noncredit programs for high-demand, low wage occupations and create a noncredit-to-credit pipeline so students have a pathway to obtain additional education and experience that will help them earn better wages and advance their careers.</p>

Key Finding	Recommendation
<p>3. Wages for Chefs and Head Cooks could be misleading: Entry-level wages for Chefs and Head Cooks are below the regional living wage, which is currently \$17.36. However, this occupation includes several roles and titles, ranging from line cook to executive chef. While standardized occupational titles are useful for classifying, collecting, and disseminating data in general, they do not always provide a complete picture of the demand and wages for specific job titles. Prolific positions that are typically considered entry-level and require less experience, like line cooks, have low wages and bring the entry-level and median wages down for this occupation.</p>	<p>3. To help students better understand wage expectations and career progression, the Regional Director for Employer Engagement could work with faculty members and administrators to define common career paths and job titles within occupations. This information can then be shared with counselors so that students can learn about their career options and how their earnings potential changes with additional education and experience.</p>
<p>4. Knowledge, Skills, and Abilities (KSAs) for the sector have not been validated by employers: The OC Sector Analysis Project brief examines job gaps but does not explore the specific KSAs taught at the colleges and compare them to the labor market’s demand for Retail, Hospitality, and Tourism KSAs. Orange County community colleges offer several courses that are designed to provide students with additional skills, rather than train them for a specific occupation.</p>	<p>4. To determine if the region’s community colleges are training for the right KSAs, the Retail, Hospitality, and Tourism Regional Director for Employer Engagement should convene employers in a “regional advisory group” where employers can review program KSAs, provide feedback, and validate the KSAs’ current relevance and demand in the labor market.</p>

APPENDIX A: METHODOLOGY AND RETAIL, HOSPITALITY, AND TOURISM DATA DEFINITIONS

The Centers of Excellence for Labor Market Research (COE) prepared this report by analyzing data from occupations and education programs. Occupational data is derived from Emsi, a software program that consolidates data from the California Employment Development Department (EDD), U.S. Bureau of Labor Statistics (BLS), and other government agencies. Program supply data is drawn from two systems: Taxonomy of Programs (TOP) and Classification of Instructional Programs (CIP).

The California Community Colleges (CCC) define “sectors” by TOP codes. To determine what occupations should be analyzed in this brief, the COE first reviewed the TOP codes associated with the sector and then matched them with the SOC codes. According to the CCC, the following six-digit TOP codes define the Retail, Hospitality, and Tourism sector:

TOP6 Program Name	TOP6 Code
Aquatics and Lifesaving	0835.70
Consumer Services	1301.10
Culinary Arts	1306.30
Display	0509.60
Diving and Underwater Safety	0959.10
Dry Cleaning	3008.00
Family and Consumer Sciences, General	1301.00
Fashion	1303.00
Fashion Design	1303.10
Fashion Merchandising	1303.20
Flight Attendant	3020.40
Hospitality	1307.00
Interior Design and Merchandising	1302.00
Labor and Industrial Relations	0516.00
Lodging Management	1307.20
Office Management	0514.40
Public Relations	0606.00
Resort and Club Management	1307.30
Restaurant and Food Services and Management	1307.10
Retail Store Operations and Management	0506.50
Travel Services and Tourism	3009.00

Using a TOP-SOC crosswalk, the COE then identified middle-skill jobs for which programs within these TOP codes train. The COE examined more than 850 occupational codes from the Standard Occupational Classification (SOC)⁴ system and identified approximately 300 occupational codes as middle-skill jobs.

Middle-skill jobs include:

- All occupations that require an educational requirement of some college, associate degree or apprenticeship;
- All occupations that require a bachelor’s degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or

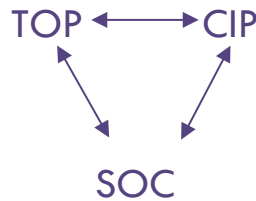
⁴ SOC is a federal statistical standard used by EDD, BLS and other federal agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data.

- All occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training where multiple community colleges have existing programs.

For this study, the COE analyzed occupations with a labor market demand of at least 50 annual job openings. (For comparison, the average and median demand for an occupation in Orange County is 307 and 63 annual job openings, respectively.)⁵ The number of annual job openings estimates employment change and turnover for an occupation each year between 2018 and 2023. Annual job openings include:

- **Job Growth:** An employer experiences increased demand for products and hires new employees to increase production. If job growth is zero or negative, then any and all openings are due to replacement needs.
- **Replacement Needs:** An employer hires replacement workers for employees who leave the workforce or change occupations. Replacement rates are derived from national 10-year, occupation-specific percentages published by the U.S. BLS's Employment Projections program.

The COE then cross-referenced the SOC codes with CIP and TOP codes to compare labor market demand with program supply. The following diagram illustrates this process:



The COE determined labor market supply for an occupation or SOC code by analyzing the number of program completers or awards in a related TOP or CIP code. The COE developed a “supply table” with this information, which is the source of the program supply data for this report. TOP data comes from the California Community Colleges Chancellor’s Office MIS Data Mart (datamart.cccco.edu) and CIP data comes from the Integrated Postsecondary Education Data System (nces.ed.gov/ipeds/use-the-data), also known as IPEDS. TOP is a system of numerical codes used at the state level to collect and report information on California community college programs and courses throughout the state that have similar outcomes. CIP codes are a taxonomy of academic disciplines at institutions of higher education in the United States and Canada. Institutions outside of the California community college system do not use TOP codes in their reporting systems.

Because a TOP/CIP code may train for more than one occupation, simply aggregating all supply from all related codes may overestimate supply for an occupation. Therefore, the COE de-duplicated TOP codes that trained for more than one occupation to avoid counting the program supply more than once. Doing so provides a more accurate representation of the supply gaps in the region by occupation. This information can be seen in the demand and supply tables in Appendix C of this study.

Qualitative Methodology

An integral aspect of the Orange County Sector Analysis Project was the qualitative data collected during the project’s focus groups. In May 2019, the COE created an advisory group comprised of the Orange County Regional Consortium Director as well as five CTE deans and directors that represented the four community college districts in Orange County. The advisory group created a process and timeline for inviting faculty and administrators to participate in focus groups to better understand where programs exist or do not exist to fill supply gaps and discuss how Orange County’s community colleges could close the supply gaps for the county’s eight priority and emerging sectors.

To create the invite list of faculty and administrators, Regional Directors for Employer Engagement and career education deans at each college were asked to identify faculty and administrators that could represent their respective colleges in the sector-specific focus groups. Once this list was compiled, the career education deans invited faculty and administrators to express their interest in participating in a focus group via email. The email introduced the COE, provided an overview of the Orange County Sector Analysis Project, described the goals of the focus groups, and informed faculty that they would be compensated for their

⁵ Emsi Data set 2019.2. QCEW Employees + Non-QCEW + Self-Employed. 2018-2023.

participation, and that lunch would be provided for all participants. All those that stated their interest were then connected with the COE who managed the focus groups scheduling and details.

In order to be as inclusive as possible, 12 focus groups were scheduled for the eight sectors – four sectors had one focus group each and four sectors had two focus groups each, during a three-week period from July to August 2019. All focus groups participants received a confirmation email before the event that included the focus group agenda, their sector-specific draft brief, and a pre-assignment with questions based off of the information contained in the draft sector briefs. Focus group participants were instructed to complete and bring the pre-assignment to the convening so that they were prepared to discuss the data, the challenges they face in their programs, and strategies to close supply gaps. Each focus groups was recorded, with permission of the participants, by the COE solely for transcription purposes.

The COE conducted no more than two focus group sessions per day. During the focus groups the Orange County Sector Analysis Project was explained and then the information contained in the draft sector briefs was presented in detail. Participants were encouraged to ask questions and engage in dialogue throughout the entire focus group session. The COE took notes of each discussion as well as recorded the sessions, with permission of the participants and solely for transcription purposes.

Following the conclusion of the focus groups, the COE compiled the audio files, transcripts, notes, and pre-assignments to conduct a qualitative analysis of the themes for each focus group and to identify commonalities across multiple focus groups. The findings from this analysis have been highlighted throughout this report in the “Focus Group Insight” sections.

APPENDIX B: DEFINITIONS FOR RETAIL, HOSPITALITY, AND TOURISM MIDDLE-SKILL JOBS

The following definitions and sample job titles for each occupation are derived from O*NET, the nation's primary source of occupational information. The O*NET database contains hundreds of standardized and occupation-specific descriptors on nearly 1,000 occupations. O*NET is developed and sponsored by the U.S. Department of Labor⁶

Actors (SOC 27-2011): Play parts in stage, television, radio, video, motion picture productions, or other settings for entertainment, information, or instruction. Interpret serious or comic role by speech, gesture, and body movement to entertain or inform audience. May dance and sing. Sample job titles include:

- Actress
- Voice-Over Artist
- Performer
- Narrator
- Comedian
- Community Theater Actor

Chefs and Head Cooks (SOC 35-1011): Direct and may participate in the preparation, seasoning, and cooking of salads, soups, fish, meats, vegetables, desserts, or other foods. May plan and price menu items, order supplies, and keep records and accounts. Sample job titles include:

- Sous Chef
- Executive Chef
- Banquet Chef
- Line Cook
- Kitchen Manager

Dancers (SOC 27-2031): Perform dances. May perform on stage, for on-air broadcasting, or for video recording. Sample job titles include:

- Ballet Dancer
- Ballerina
- Dance Artist
- Belly Dancer
- Soloist Dancer
- Modern Dancer

Entertainers and Performers, Sports and Related Workers, All Other (SOC 27-2099): All entertainers and performers, sports and related workers not listed separately. No sample job titles reported.

Fashion Designers (SOC 27-1022): Design clothing and accessories. Create original designs or adapt fashion trends. Sample job titles include:

- Costume Designer
- Sweater Designer
- Shoe Designer
- Dance Costume Designer
- Product Developer
- Pattern Designer

First-Line Supervisors of Food Preparation and Serving Workers (SOC 35-1012): Directly supervise and coordinate activities of workers engaged in preparing and serving food. Sample job titles include:

- Kitchen Supervisor
- Food Service Supervisor
- Cafeteria Manager
- Restaurant Manager
- Food Service Director
- Food Production Supervisor

First-Line Supervisors of Retail Sales Workers (SOC 41-1011): Directly supervise and coordinate activities of retail sales workers in an establishment or department. Duties may include management functions, such as purchasing, budgeting, accounting, and personnel work, in addition to supervisory duties. Sample job titles include:

- Store Manager
- Department Supervisor
- Shift Manager
- Department Manager
- Bakery Manager
- Grocery Manager

⁶ <https://www.onetonline.org/>

Fitness Trainers and Aerobics Instructors (SOC 39-9031): Instruct or coach groups or individuals in exercise activities.

Demonstrate techniques and form, observe participants, and explain to them corrective measures necessary to improve their skills.

Sample job titles include:

- Yoga Instructor
- Personal Trainer
- Group Fitness Instructor
- Group Exercise Instructor
- Fitness Consultant
- Certified Personal Trainer

Food Service Managers (SOC 11-9051): Plan, direct, or coordinate activities of an organization or department that serves food and beverages. Sample job titles include:

- Restaurant General Manager
- Restaurant Manager
- Dining Services Director
- Catering Director
- General Manager
- Food and Beverage Manager

Lodging Managers (SOC 11-9081): Plan, direct, or coordinate activities of an organization or department that provides lodging and other accommodations. Sample job titles include:

- Hotel Manager
- Resort Manager
- Front Desk Manager
- Bed and Breakfast Innkeeper
- Night Manager
- Front Office Manager

Recreation Workers (SOC 39-9032): Conduct recreation activities with groups in public, private, or volunteer agencies or recreation facilities. Organize and promote activities, such as arts and crafts, sports, games, music, dramatics, social recreation, camping, and hobbies, taking into account the needs and interests of individual members. Sample job titles include:

- Recreation Leader
- Activities Director
- Recreation Coordinator
- Recreation Assistant
- Activity Aide
- Activities Assistant

Reservation and Transportation Ticket Agents and Travel Clerks (SOC 43-4181): Make and confirm reservations for transportation or lodging, or sell transportation tickets. May check baggage and direct passengers to designated concourse, pier, or track; deliver tickets, contact individuals and groups to inform them of package tours; or provide tourists with travel or transportation information. Sample job titles include:

- Station Agent
- Reservationist
- Airline Ticket Agent
- Reservation Agent
- Tour Sales Representative
- Airport Sales Agent

Travel Agents (SOC 41-3041): Plan and sell transportation and accommodations for travel agency customers. Determine destination, modes of transportation, travel dates, costs, and accommodations required. May also describe, plan, and arrange itineraries and sell tour packages. May assist in resolving clients' travel problems. Sample job titles include:

- Travel Counselor
- Travel Consultant
- Corporate Travel Consultant
- Auto Travel Counselor
- Destination Specialist
- Beach Expert

APPENDIX C: RETAIL, HOSPITALITY, AND TOURISM DEMAND AND SUPPLY DATA

The following tables compare labor market demand and program supply by occupation. Because a TOP/CIP code may train for more than one occupation, simply aggregating all supply from all related codes may overestimate supply for that occupation. Therefore, the COE de-duplicated TOP codes that train for more than one occupation to avoid counting program supply more than once. This de-duplication process is denoted by the “Accounted for Above” statements in the tables on the following pages.

Additionally, the COE reviewed program data from the LaunchBoard⁷ and the statewide COE Supply Table⁸ and identified conflicting information. For certain occupations, LaunchBoard indicates that a college has a program for that occupation, but the COE Supply Table does not show program data for that college, and vice versa. These discrepancies are marked with the following:

+The COE Supply Table indicates that this college supplies awards for this TOP code, but this college is not listed in the LaunchBoard

*LaunchBoard indicates that this college/school supplies awards for this TOP code, but this college is not listed in COE Supply Table

The demand and supply tables in the following pages have three categories:

1. **Supply Gap** – If Average Annual Openings exceed Average Annual Awards by more than 25 percent, then the cell is shaded in light green.
2. **Supply Met** – If Average Annual Openings is within 25 percent +/- of Average Annual Awards, then the cell is shaded in light blue.
3. **Oversupply** – If Average Annual Openings exceed the Average Annual Awards by more than 25 percent, then the cell is shaded in red.

⁷ calpassplus.org/LaunchBoard/Home.aspx

⁸ coeccc.net/COE/media/SupplyandDemandPageDocuments/Supply-2014-17_Feb-2018.xlsm

DEMAND AND SUPPLY DATA FOR TOP RETAIL, HOSPITALITY, AND TOURISM MIDDLE-SKILL JOBS IN ORANGE COUNTY

+ The COE Supply Table indicates that this college supplies awards for this TOP code, but this college is not listed in the LaunchBoard

* LaunchBoard indicates that this college supplies awards for this TOP code, but this college is not listed in COE Supply Table

OCCUPATIONAL TITLE	AVERAGE ANNUAL OPENINGS (2018-23)	SUPPLY GAP/ SUPPLY MET OVERSUPPLY	AVERAGE ANNUAL AWARDS (2015-17)	TOP6 TITLE	TOP6 OR CIP	COLLEGE	COLLEGE SUPPLY (3-YR AVG)
Fitness Trainers and Aerobics Instructors	739	Supply Gap	40	Fitness Trainer	0835.20	Fullerton	4
						Irvine	5
						Orange Coast	9
						Saddleback	1
						Santa Ana	3
				Athletic Training and Sports Medicine	1228.00	Saddleback	1
						Orange Coast*	0
						Cypress*	0
				CIP 51.0913	Career Networks Institute	17	
Actors	133	Supply Gap	0	N/A	N/A	No Programs	0
Fashion Designers	72	Supply Gap	39	Fashion	1303.00	Fullerton	1
						Orange Coast	1
						Saddleback	2
				Fashion Design	1303.10	Fullerton	7
						Orange Coast	13
						Saddleback	10
						Santa Ana	5

DEMAND AND SUPPLY DATA FOR RETAIL, HOSPITALITY, AND TOURISM MIDDLE-SKILL JOBS WITH ENTRY-LEVEL WAGES BELOW CALIFORNIA FAMILY NEEDS CALCULATOR IN ORANGE COUNTY

+The COE Supply Table indicates that this college/school supplies awards for this TOP code, but this college is not listed in the LaunchBoard

*LaunchBoard indicates that this college/school supplies awards for this TOP code, but this college is not listed in COE Supply Table

~Noncredit awards

^ North Orange Continuing Education is also known as North Orange Adult in the California Community Colleges Chancellor's Office Management Information System

OCCUPATIONAL TITLE	AVERAGE ANNUAL OPENINGS (2018-23)	SUPPLY GAP/ SUPPLY MET/ OVERSUPPLY	AVERAGE ANNUAL AWARDS (2015-17)	TOP6 TITLE	TOP6 OR CIP	COLLEGE	COLLEGE SUPPLY (3-YR AVG)
First-Line Supervisors of Retail Sales Workers	1488	Supply Gap	9	Retail Store Operations and Management	0506.50	Coastline+	1
						Cypress+	1
						Golden West*	0
						Saddleback	1
						Santa Ana+	4
				Santiago Canyon+	1		
Display	0509.60	Orange Coast	1				
First-Line Supervisors of Food Preparation and Serving Workers	1486	Supply Gap	51	Dietetic Services and Management	1306.20	Orange Coast	9
				Restaurant and Food Services and Management	1307.10	Cypress	32
						Orange Coast	10
Recreation Workers	698	Supply Gap	0	Parks and Outdoor Recreation	0115.10	No Programs	0
				Aquatics and Lifesaving	0835.70	Cypress*	0
				Recreation Assistant	0836.10	No Programs	0

RETAIL, HOSPITALITY, AND TOURISM
Demand and Supply Analysis: Orange County

OCCUPATIONAL TITLE	AVERAGE ANNUAL OPENINGS (2018-23)	SUPPLY GAP/ SUPPLY MET/ OVERSUPPLY	AVERAGE ANNUAL AWARDS (2015-17)	TOP6 TITLE	TOP6 OR CIP	COLLEGE	COLLEGE SUPPLY (3-YR AVG)
Food Service Managers	586	Supply Gap	238	Management Development and Supervision	0506.30	Coastline	207
						Irvine+	1
						Saddleback	25
						Cypress*	0
						Golden West*	0
						Orange Coast*	0
				CIP 52.0204	Allied American University	4	
				CIP 52.0205	University of Phoenix-California	1	
				Dietetic Services and Management	1306.20	Already Accounted For	0
Restaurant and Food Services and Management	1307.10	Already Accounted For	0				
Chefs and Head Cooks	358	Supply Met	346	Nutrition, Foods, and Culinary Arts	1306.00	Fullerton	1
						Orange Coast	8
						Saddleback	13
						Santa Ana	2
						Coastline*	0
						Santiago Canyon*	0
						Cypress*	0
						North Orange Adult**^	0
				CIP 19.0501	Brandman University	4	
				Culinary Arts	1306.30	Cypress	77
						Orange Coast	86
						Saddleback	27
						Santiago Canyon~	4
						CIP 12.0501	Argosy University-The Art Institute of California-Orange County
CIP 12.0503	Argosy University-The Art Institute of California-Orange County	70					

RETAIL, HOSPITALITY, AND TOURISM

Demand and Supply Analysis: Orange County

OCCUPATIONAL TITLE	AVERAGE ANNUAL OPENINGS (2018-23)	SUPPLY GAP/ SUPPLY MET/ OVERSUPPLY	AVERAGE ANNUAL AWARDS (2015-17)	TOP6 TITLE	TOP6 OR CIP	COLLEGE	COLLEGE SUPPLY (3-YR AVG)
				Restaurant and Food Services and Management	1307.10	Already Accounted For	0
Travel Agents	181	Supply Gap	33	Sales and Salesmanship	0509.40	Orange Coast*	0
				Travel Services and Tourism	3009.00	Cypress	17
						Orange Coast+	9
						Saddleback	7
Entertainers and Performers, Sports and Related Workers, All Other	111	Supply Gap	0	N/A	N/A	No Programs	0
Reservation and Transportation Ticket Agents and Travel Clerks	110	Supply Gap	0	Travel Services and Tourism	3009.00	Already Accounted For	0
Dancers	61	Supply Gap	7	Commercial Dance	1008.10	Cypress	2
						Irvine	2
						Orange Coast	3
Lodging Managers	52	Supply Gap	37	Management Development and Supervision	0506.30	Already Accounted For	0
				Hospitality	1307.00	Cypress	6
						Orange Coast	3
				Lodging Management	1307.20	Bristol University	1
						Cypress	18
				Resort and Club Management	1307.30	Orange Coast	8
						Cypress+	1