



CENTER OF EXCELLENCE
FOR LABOR MARKET RESEARCH

ORANGE COUNTY



ORANGE COUNTY SECTOR PROFILE

**RETAIL, HOSPITALITY, AND
TOURISM**

2024



ORANGE COUNTY
REGIONAL CONSORTIUM

WORKFORCE
DEVELOPMENT ALLIANCE



California
Community
Colleges

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[Supplemental Appendices](#)¹ are available as a companion to this report and include the following:

Appendix D: Retail, Hospitality, and Tourism Demand – Labor Market Data

Appendix E: Retail, Hospitality, and Tourism Supply – Community College and Non-Community College Awards

Appendix F: Retail, Hospitality, and Tourism CIP Codes



INTRODUCTION

This report is the ninth in a series of 12 sector profiles that aim to provide a comprehensive analysis of Orange County's occupational landscape. This series dives into each of the 12 community college sectors, offering historical and projected occupational insights while building upon foundational research established through the [Orange County Labor Market Overview](#).² This sector profile focuses on Retail, Hospitality, and Tourism, which the Orange County Region has ranked ninth out of the 12 sectors based on the Orange County Labor Market Overview and corresponding region-wide survey of community colleges and key partners.

The Retail, Hospitality, and Tourism sector encompasses a wide array of services related to customer experience, ranging from food service to entertainment, retail sales, travel, and accommodation. Some occupations in this sector include specific types of managers, such as *Food Service Managers (11-9051)*, *Lodging Managers (11-9081)*, and *Gambling Managers (11-9071)*, which are all considered middle-skill occupations. There are also occupations like *Fashion Designers (27-1022)*[^], *Interior Designers (27-1025)*[^], and *Meeting, Convention, and Event Planners (13-1121)*[^], which often require specialized skills, making them above middle-skill occupations. Below middle-skill occupations, such as *Waiters and Waitresses (35-3031)*^{*}, *Bartenders (35-3011)*^{*}, and *Retail Salespersons (41-2031)*^{*}, are essential for the day-to-day operations of establishments, providing direct services to customers. These jobs often require less formal education but are crucial for ensuring smooth service delivery in restaurants, hotels, and retail settings.



In addition, this sector includes travel-related occupations such as *Tour and Travel Guides (39-7018)*, *Flight Attendants (53-2031)*[#], and *Travel Agents (41-3041)*, which involve facilitating customer experiences during leisure and business travel. This diverse sector plays a vital role in the global economy by supporting tourism, entertainment, retail operations, and hospitality services.

The Retail, Hospitality, and Tourism sector is comprised of 50 occupations, 14 of which were highlighted in the Orange County Labor Market Overview. These 50 occupations account for 6% of the total number of occupations in the federal Bureau of Labor Statistics (BLS) Standard Occupational Classification (SOC) system and only 1% (1) is on the U.S. News & World Report's 100 Best Jobs of 2024 list.³

Occupations are denoted throughout this report in italics, with their corresponding SOC code in parentheses, with below middle-skill occupations denoted with an * and above middle-skill occupations denoted with a ^ and occupations that are on the U.S. News & World Report's 2024 100 Best Jobs list denoted by #, such as, *Flight Attendants (53-2031)*[#].

By examining key aspects such as occupational trends, major employers, skills, program completions, and opportunities, the OC COE seeks to highlight underlying dynamics and intricacies shaping the Retail, Hospitality, and Tourism sector in Orange County. Community colleges and regional stakeholders can use this information for strategic planning and data-informed decision making to address workforce needs in this sector.

RETAIL, HOSPITALITY, AND TOURISM OCCUPATIONAL DATA ANALYSIS

Orange County's Occupational Landscape

The Retail, Hospitality, and Tourism sector is comprised of 50 occupations that accounted for 229,397 jobs in 2022, representing 13% of all jobs in Orange County. These jobs are expected to grow by 11% through 2027, resulting in 46,249 projected annual openings.

Retail, Hospitality, and Tourism Sector Key Facts



229,397

Number of Jobs
in 2022



25,801

5-Year Change
through 2027



11%

5-Year Percent
Change



46,249

Annual
Openings



13,730

Establishments



\$14.01 - \$40.72

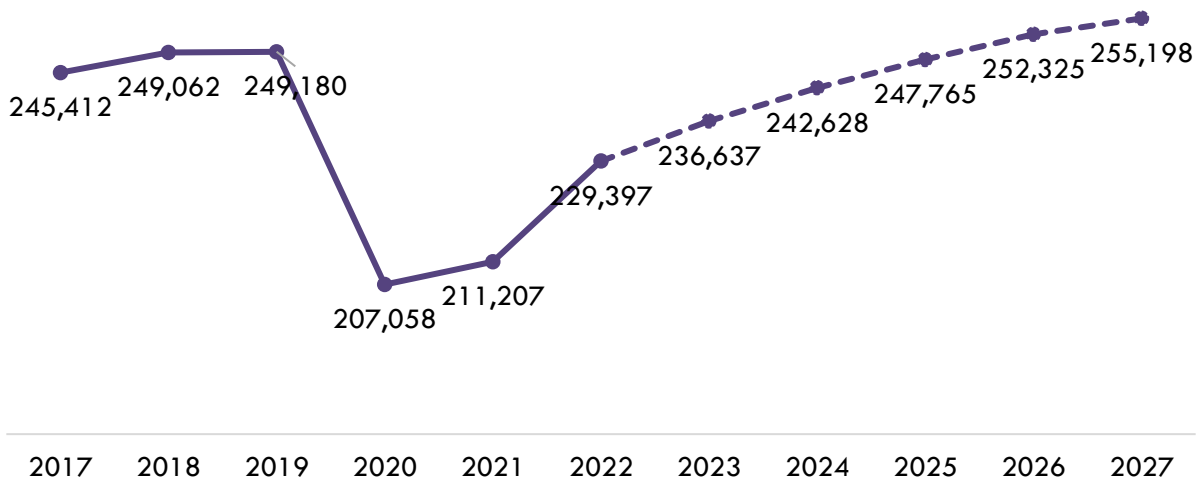
Occupational Entry-Level
Wage Range



Historical and Projected Employment

Over a 10-year period, from 2017 projected through 2027, Retail, Hospitality, and Tourism jobs have been and are projected to continue steadily rising at a consistent pace, except for an incredibly sharp drop during the State's shutdown in 2020 due to the COVID-19 pandemic (Exhibit 1). Employment in this sector is projected to surpass pre-COVID levels by 2026.

Exhibit 1: Historical and Projected Retail, Hospitality, and Tourism Employment in Orange County (2017-2027)



The 50 occupations in the Retail, Hospitality, and Tourism sector are categorized into four above middle-skill, 15 middle-skill, and 31 below middle-skill occupations (Exhibit 2). In 2022, the 31 below middle-skill occupations accounted for 182,865 jobs, constituting 80% of the total Retail, Hospitality, and Tourism workforce; followed by the 15 middle-skill occupations, with 41,509 jobs, representing 18% of the total workforce (Exhibit 3).

Exhibit 2: Skill-Level for Retail, Hospitality, and Tourism Occupations

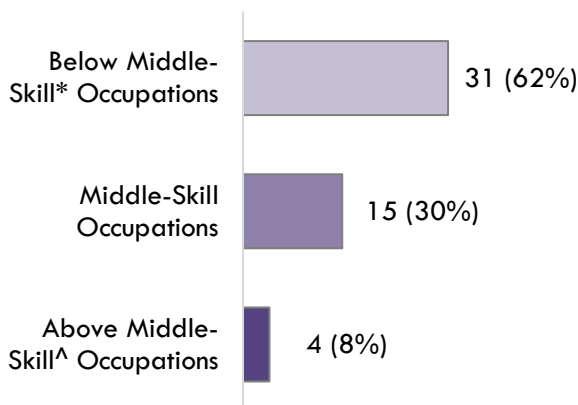
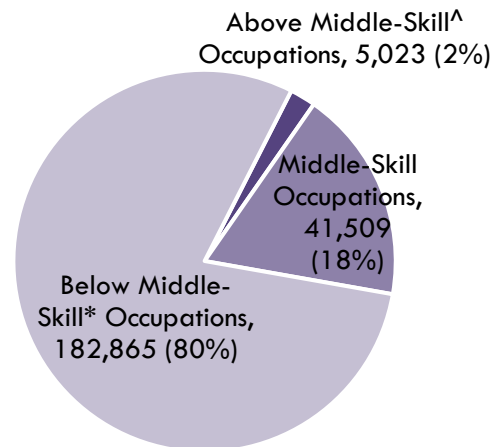


Exhibit 3: Breakdown of 2022 Jobs for Retail, Hospitality, and Tourism Occupations by Skill-Level



*Note: Throughout this report, Below Middle-Skill Occupations are denoted with an * and Above Middle-Skill Occupations are denoted with a ^.*

Trends In Occupational Demand

Orange County is one of the nation’s premier Retail, Hospitality, and Tourism, destinations and is home to South Coast Plaza, one of the largest malls nationwide, as well as the Disneyland Resort, which is the second-most visited amusement park in the world.⁴ Though the COVID-19 pandemic caused drops in retail sales and tourism that led to heavy job loss, parts of the industry have regained strength while others have not yet recovered to pre-pandemic levels. Notably, shifts in consumer preferences have led to increased sales for take-out, delivery, and drive-through establishments, but on-site restaurant traffic has not yet fully recovered nationally.⁵ Similarly, retail employment in has not fully recovered, partially due to swings in shopping spending over the last several years.⁶

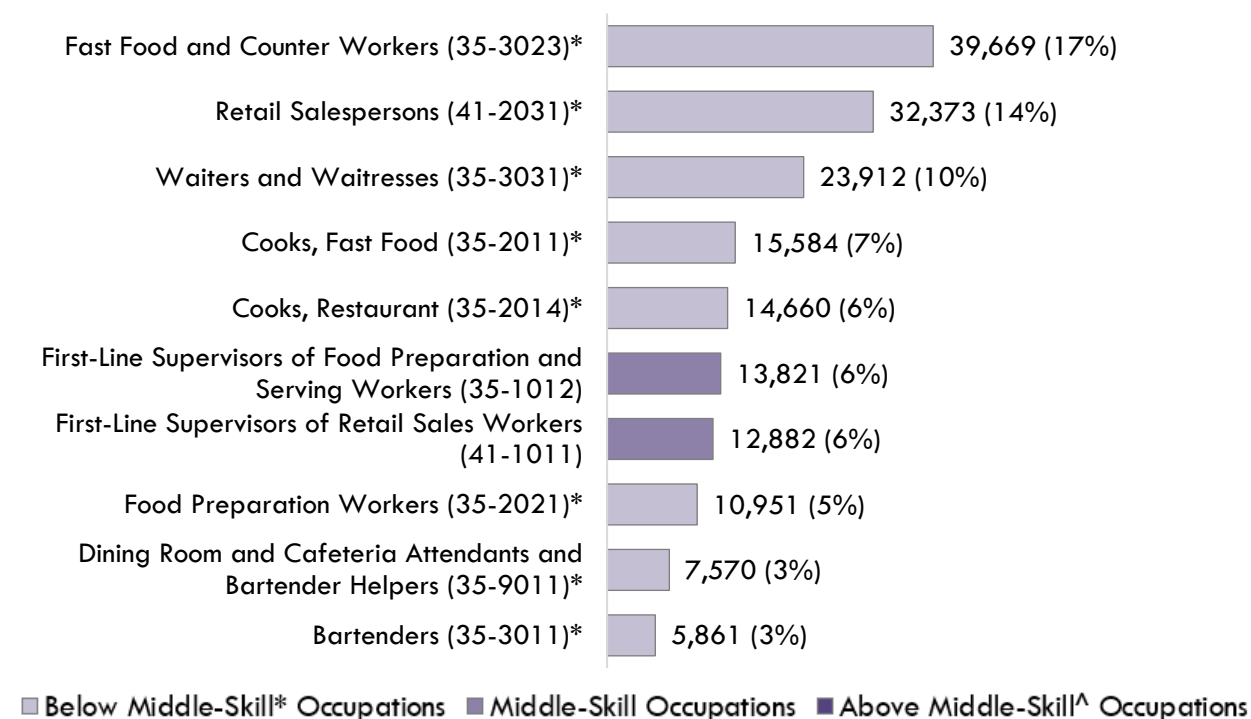
Though retail and food services have not fully recovered, tourism has thrived over the last couple years. In 2023, Orange County’s tourism industry experienced a significant rebound, with spending rising 5.3% to reach \$15.8 billion, marking the second consecutive year it surpassed pre-pandemic levels. Additionally, “Orange County is the state’s fourth-largest tourism region.”⁷

Regionally, the 50 occupations in this sector accounted for nearly 230,000 jobs in 2022 and are estimated to have over 46,000 annual openings through 2027 in Orange County. Jobs in this sector are projected to grow at a faster rate compared to all occupations in Orange County through 2027 but only 2% (1) of the occupations have entry-level wages above the MIT Living Wage for Orange County of \$30.48.⁸ More than three-fourths of Retail, Hospitality, and Tourism jobs (80%) are for below middle-skill occupations and another 18% of jobs are for middle-skills occupations.

Jobs

Jobs equate to the number of people currently in an occupation as opposed to unmet demand, which refers to the number of people still needed in an occupation. Comprising 17% of all jobs in Orange County’s Retail, Hospitality, and Tourism sector, *Fast Food and Counter Workers (35-3023)**, a below middle-skill occupation, has the most jobs (39,669), followed by *Retail Salespersons (41-2031)**, another below middle-skill occupation with 14% of all jobs. All top 10 Retail, Hospitality, and Tourism jobs, 2022 are shown in Exhibit 4.

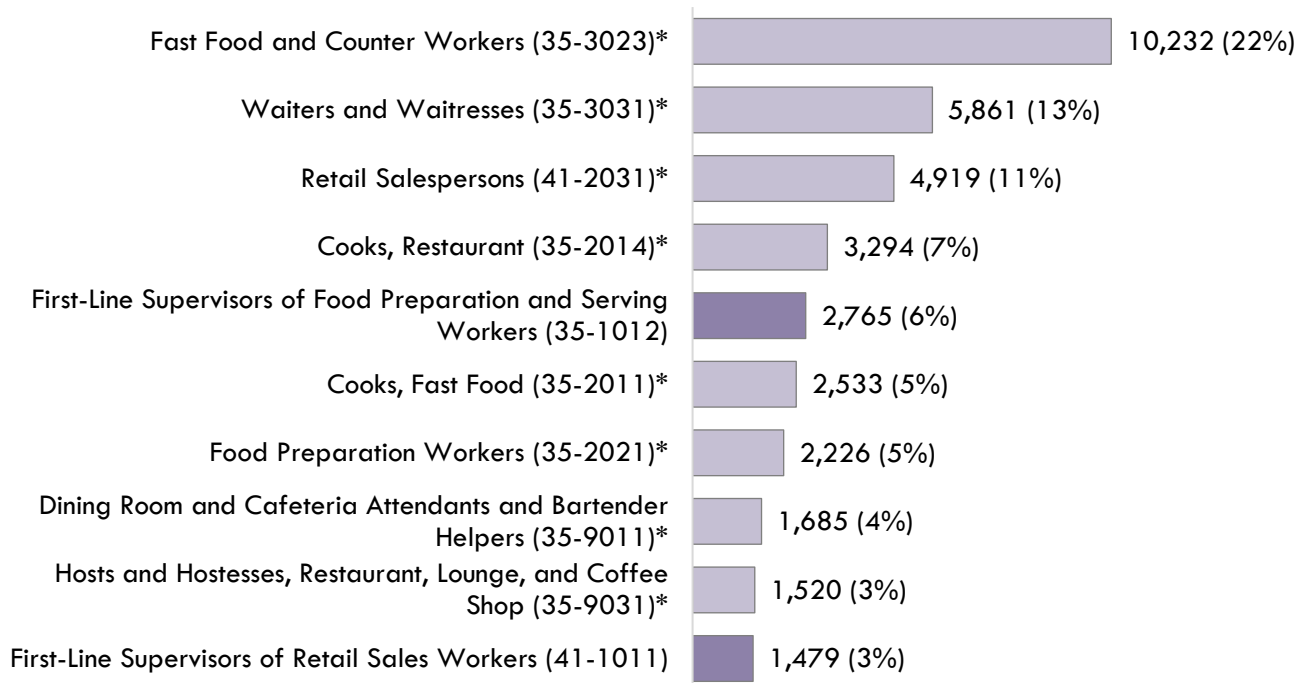
Exhibit 4: Top 10 Retail, Hospitality, and Tourism Jobs, 2022



Annual Openings

There are 46,249 Retail, Hospitality, and Tourism sector annual openings, also known as “demand” or “unmet demand”, in Orange County. *Fast Food and Counter Workers (35-3023)** accounts for the largest percentage of annual openings (22%), followed by *Waiters and Waitresses (35-3031)** (13%), with *First-Line Supervisors of Retail Sales Workers (41-1011)* (3%) rounding out the sector’s annual openings, as shown in Exhibit 5.

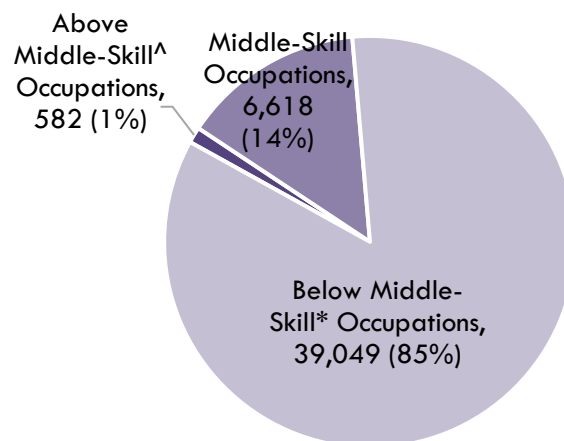
Exhibit 5: Top 10 Annual Openings by Retail, Hospitality, and Tourism Occupation



■ Below Middle-Skill* Occupations ■ Middle-Skill Occupations ■ Above Middle-Skill^ Occupations

Below-middle-skill occupations comprise 85% of all annual openings in the Retail, Hospitality, and Tourism sector followed by middle-skill occupations (14%). Exhibit 6 shows the annual openings by skill-level.

Exhibit 6: Distribution of All Retail, Hospitality, and Tourism Annual Openings by Skill-Level

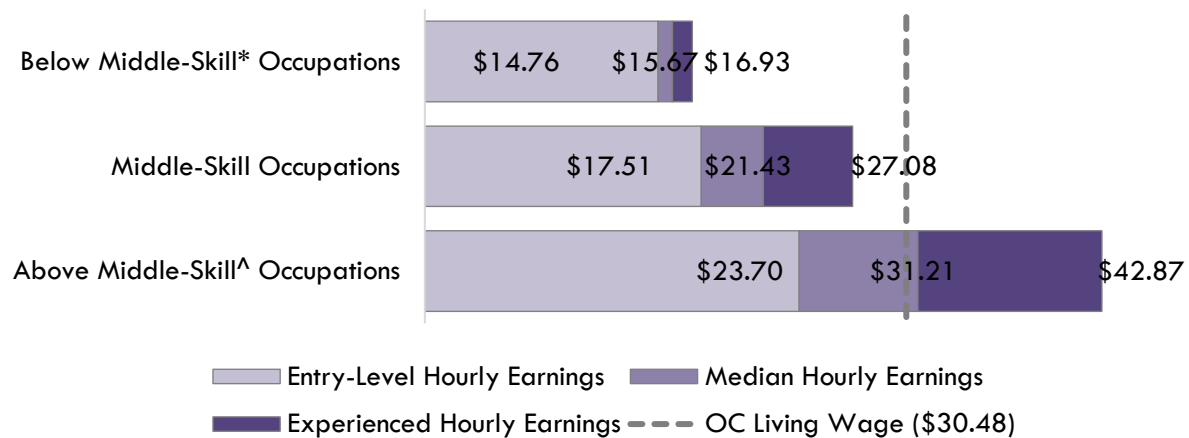


Earnings

In Orange County, the MIT Living Wage for one adult is \$30.48 per hour, which is the floor benchmark for wages in the county. Of the 50 occupations, only one has entry-level wages above Orange County's living wage, *Gambling Managers (11-9071)*. Entry-level wages across all 50 Retail, Hospitality, and Tourism occupations range from \$14.01 to \$40.72 per hour, with *Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop (35-9031)** and the aforementioned *Gambling Managers (11-9071)* at the lower- and upper-end of this range, respectively.

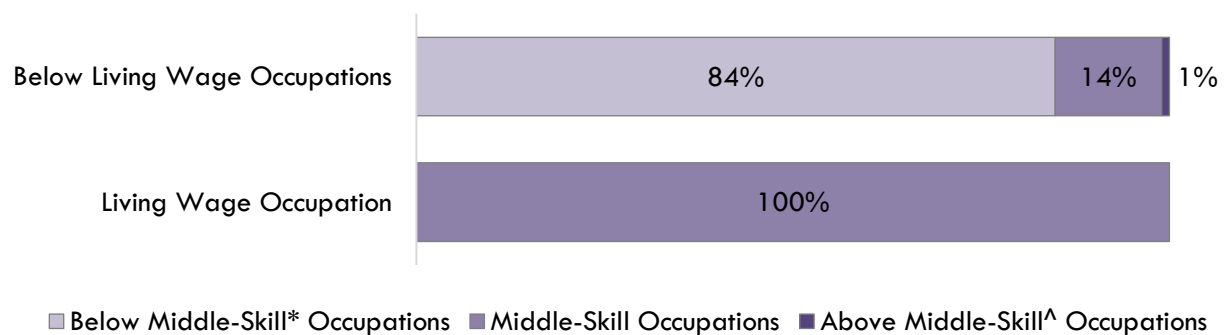
To better understand Retail, Hospitality, and Tourism sector wages in Orange County, wages are weighted by the number of 2022 jobs. This accounts for wage variation between occupations by normalizing the data based on the number of jobs. It adjusts for situations like a large number of low-wage jobs, a small number of high-wage jobs, or any combination of the two. Exhibit 7 shows the full spectrum of weighted wages (from entry-level to experienced) by skill level for the 50 Retail, Hospitality, and Tourism occupations, ranging from below-middle-skill entry-level wages of \$14.76 to above middle-skill experienced wages of \$42.87.

Exhibit 7: Retail, Hospitality, and Tourism Occupational Wages by Skill Level, Weighted by 2022 Jobs



Notably, less than 1% of the annual job openings in this sector have entry-level wages above the living wage; 100% are for one middle-skill occupation, as shown in Exhibit 8.

Exhibit 8: Comparison of Living Wages by Retail, Hospitality, and Tourism Annual Openings and Skill Level

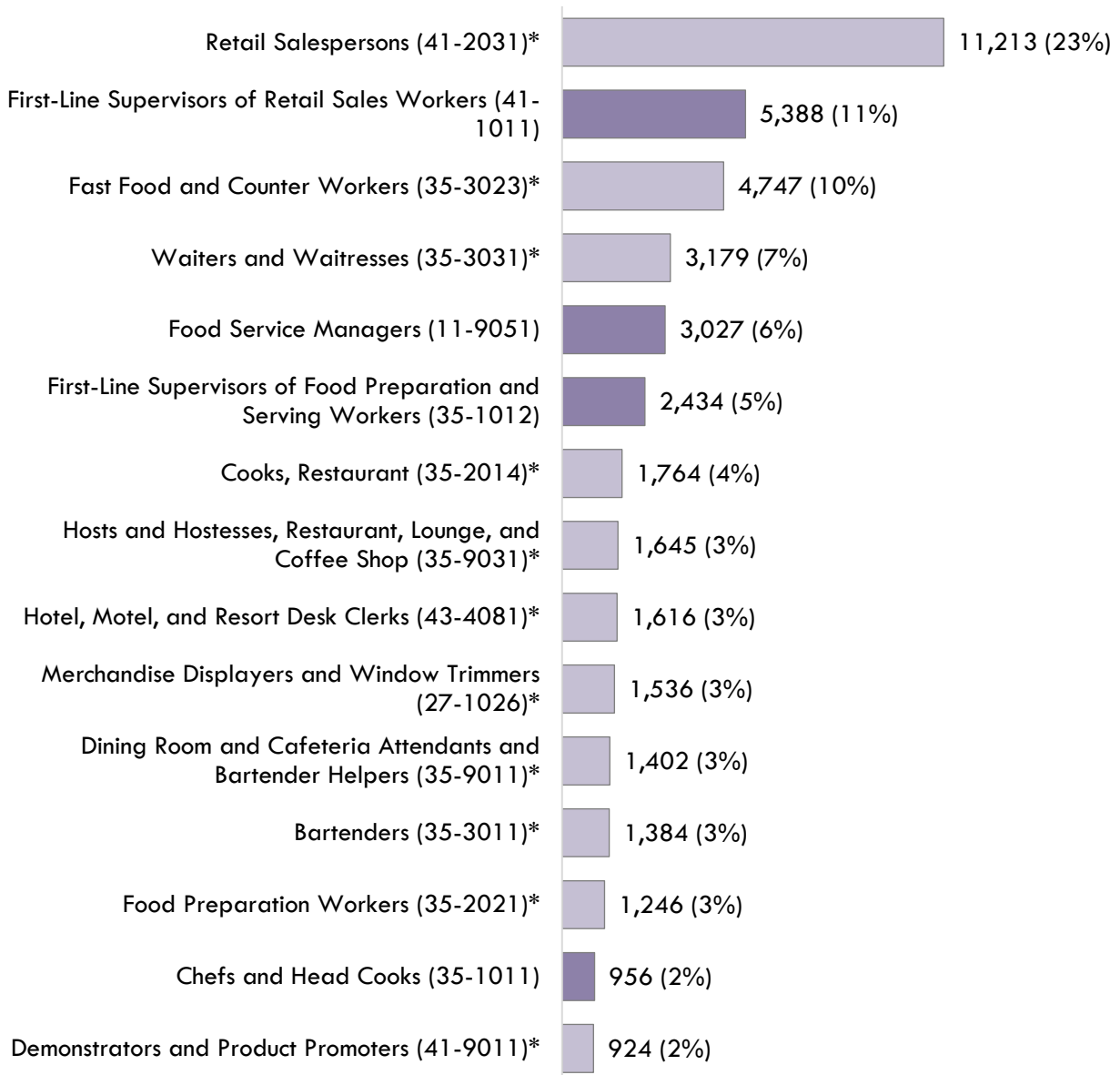


JOB POSTINGS INFORMATION

Job Postings in Orange County

Over the past 12 months (October 2023 – September 2024), there were 48,611 employer job postings within Orange County for all Retail, Hospitality, and Tourism occupations. Exhibit 9 shows the 15 occupations with the highest number of job postings, which represents approximately 87% of all job postings within the sector. Most notably, *Retail Salespersons (41-2031)** comprise nearly one fourth (23%) of the job postings.

Exhibit 9: Top 15 Retail, Hospitality, and Tourism Media Occupations by Number of Job Postings



■ Below Middle-Skill* Occupations ■ Middle-Skill Occupations ■ Above Middle-Skill^ Occupations

Top Employers

Orange County's Retail, Hospitality, and Tourism employers are diverse, as shown in Exhibit 10. Companies like Macy's, Kroger, and The Habit Burger Grill offer below middle-skill jobs, such as sales associates, deli clerks, baristas, and kitchen crew, for those with minimal experience. Employers like Starbucks, Nordstrom, and Walgreens Boots Alliance seek middle-skill roles like assistant managers and shift supervisors.

Companies like Disney, Marriott, Actalent, and LA Fitness offer above middle-skill jobs, often requiring a degree or certifications, such as managerial, technical, and professional services roles. Notably, Marriott and Hilton span all three skill levels, from front desk agents to event managers.

Exhibit 10: Top 10 Retail, Hospitality, and Tourism Regional Employers with the Most Job Postings by Skill Level

Below Middle-Skill*	Middle-Skill	Above Middle-Skill^
1. Marriott International	1. Starbucks	1. Disney
2. Starbucks	2. Marriott International	2. Marriott International
3. Hilton	3. Taco Bell	3. Supreme Fitness
4. Macy's	4. Del Taco	4. Disability Solutions
5. Hyatt	5. Nordstrom	5. Michaels
6. Kroger	6. Hilton	6. The Home Depot
7. Sprouts Farmers Market	7. Dollar Tree	7. Actalent
8. Bloomingdale's	8. Kentucky Fried Chicken	8. Hilton
9. The Habit Burger Grill	9. Walmart	9. LA Fitness
10. CVS Health	10. Walgreens Boots Alliance	10. Restoration Hardware

Top Job Titles

Below middle-skill job titles such as Sales Associates, Servers, and Cooks typically require minimal training and focus primarily on manual labor and basic technical skills. Middle-skill job titles such as Assistant Managers, Shift Supervisors, and Sous Chefs, reflect positions that require more technical expertise, experience, and/or training. These jobs involve a higher level of responsibility, such as overseeing crew members, managing day-to-day operations, and ensuring the smooth execution of tasks. Workers in these roles often bridge the gap between entry-level employees and upper management, taking on duties like scheduling, staff development, and maintaining quality standards. Above middle-skill job titles incorporate professions with a higher degree of technical complexity and require advanced education and/or specialized training, such as Interior Designers, Event Managers, and Decorators. Job titles by skill level are shown in Exhibit 11.

Exhibit 11: Top Retail, Hospitality, and Tourism Job Titles in Orange County by Skill Level

Below Middle-Skill *	Middle-Skill	Above Middle-Skill^
1. Sales Associates	1. Assistant Managers	1. Interior Designers
2. Retail Sales Associates	2. Shift Leaders	2. Event Coordinators
3. Baristas	3. Assistant Store Managers	3. Event Managers
4. Servers	4. Shift Supervisors	4. Kitchen and Bath Designers
5. Team Members	5. General Managers	5. Camp Directors
6. Hosts/Hostesses	6. Store Managers	6. Assistant Managers
7. Bartenders	7. Assistant General Managers	7. Interior Design Assistants
8. Crew Members	8. Key Holders	8. Club Managers
9. Cooks	9. Restaurant Managers	9. Event Planners
10. Retail Merchandisers	10. Sous Chefs	10. Decorators

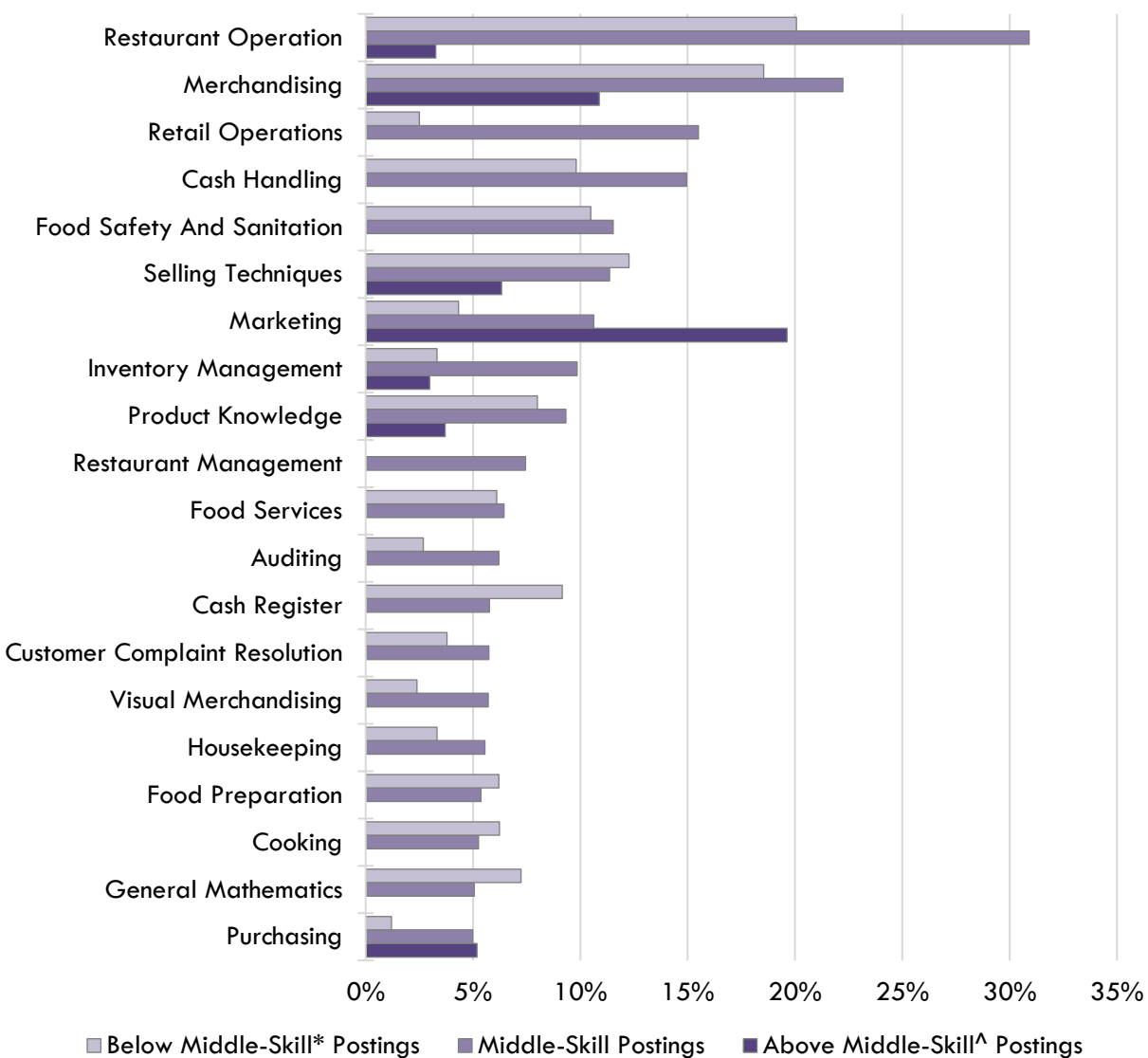
Skills in Job Postings

There are three types of skills listed in job postings: specialized (“technical” or “hard”), common (“soft” or “human”), and computer skills.

Top Specialized Skills

Among the 20 specialized skills listed, only seven (7) are common across all three occupational skill levels: restaurant operation, merchandising, selling techniques, marketing, inventory management, product knowledge, and purchasing. Marketing (20%) and merchandising (11%) are the highest requested skills in above middle-skill postings, indicating their significance in jobs such as *Meeting, Convention, and Event Planners (13-1121)*[^] and *Fashion Designers (27-1022)*[^]. Conversely, skills like restaurant operation (31%) and merchandising (22%) are prevalent in middle-skill occupations, such as *Food Service Managers (11-9051)* and *First-Line Supervisors of Retail Sales Workers (41-1011)*. Notably, the below middle-skill postings category shows relatively higher percentage for selling techniques (12%), cash register (9%), general mathematics (7%), cooking (6%), and food preparation (6%) as shown in Exhibit 12.

Exhibit 12: Top 20 Specialized Skills in Retail, Hospitality, and Tourism Occupations



Top Common Skills

Among the top 10 common skills listed in Exhibit 13, customer service skills are the most frequently demanded overall, peaking at 57% in middle-skill postings, 51% in below middle-skill postings, and 35% in above middle-skill postings. Communication is more highly requested for middle-skill (51%) than in above middle-skill (50%) and below middle-skill (36%) postings. Also notable is cleanliness which is requested in 16% of below middle-skill and 14% of middle-skill postings, but only 5% of above middle-skill postings. Above middle-skill postings rank customer service (35%), management (32%), sales (27%), and operations (25%) as the most requested common skills after communication.

Exhibit 13: Top 10 Common Skills in Retail, Hospitality, and Tourism Occupations

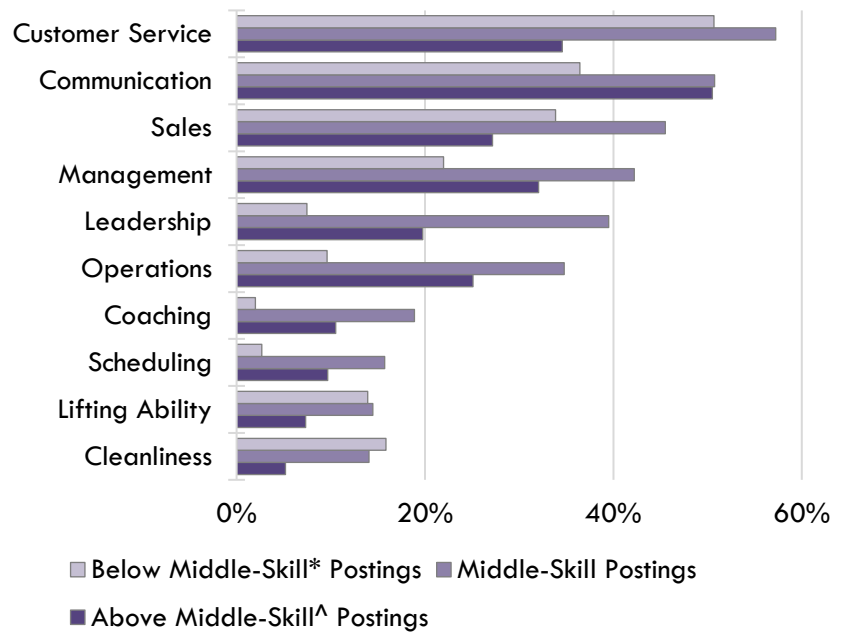
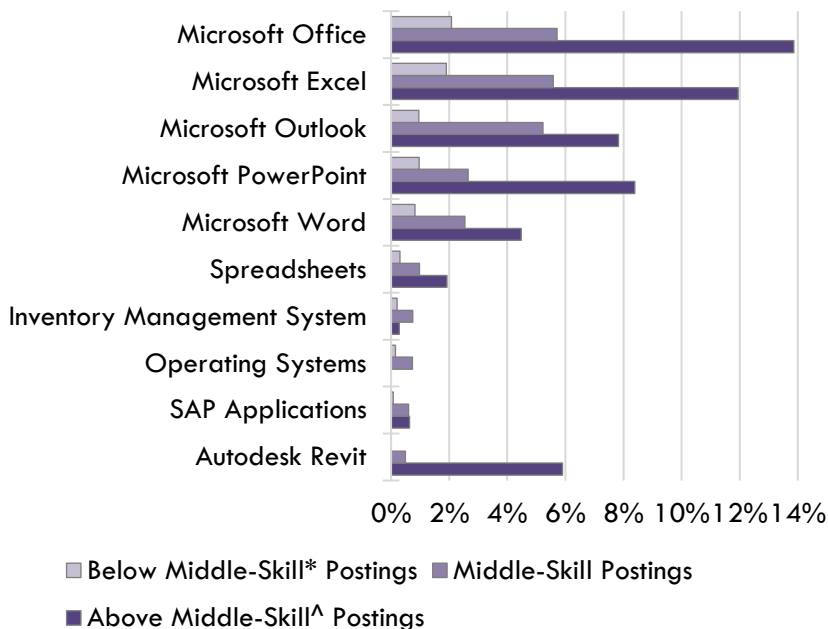


Exhibit 14: Top 10 Computer Skills in Retail, Hospitality, and Tourism Occupations



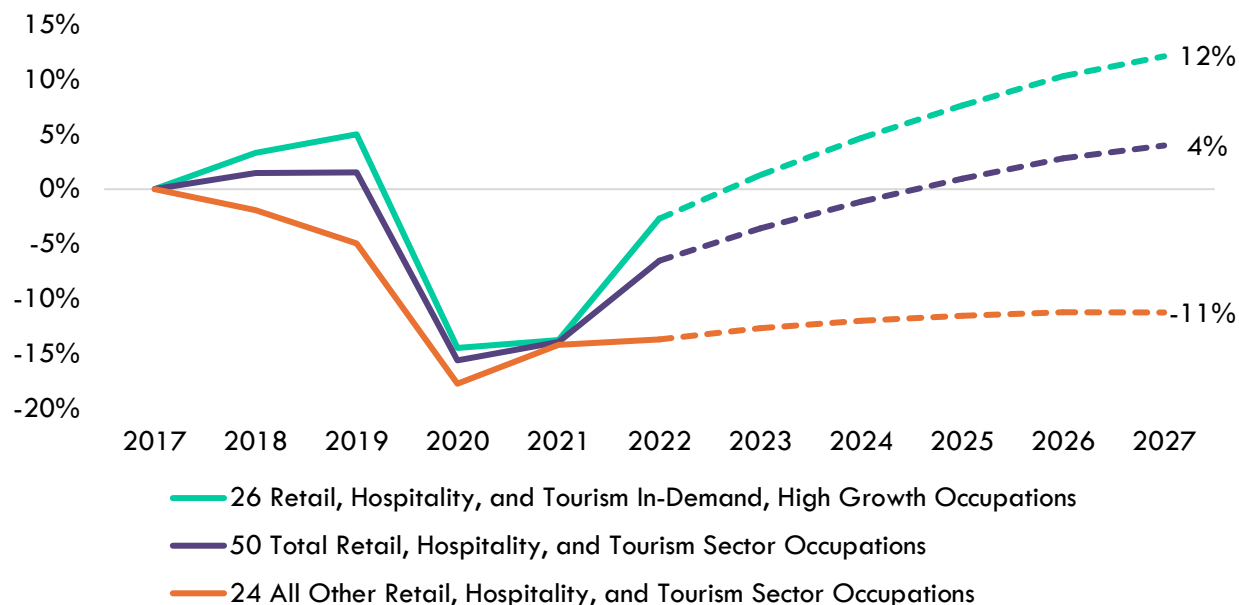
Top Computer Skills

Computer skills are not requested nearly as often as those in the other skills categories within the Retail, Hospitality, and Tourism sector. However, in general, they are most frequently requested in above middle-skill job postings. Microsoft Office is mentioned in 14% of above middle-skill postings, 6% of middle-skill postings, and 2% of below middle-skill postings. Similarly, Microsoft Excel is the highest in above middle-skill postings (12%), compared to 6% in middle-skill postings and 2% in below middle-skill postings. Operating Systems is higher in middle-skill (1%), compared to 0.1% of below middle-skill, and it is not requested at all in above middle-skill postings. The top 10 computer skills are shown in Exhibit 14.

KEY OCCUPATIONS DRIVING EMPLOYMENT

There are 26 Retail, Hospitality, and Tourism Sector occupations, 52% of the total 50 occupations in the sector, that have a significant number of jobs and annual openings and are projected to have high growth through 2027. These 26 key occupations are anticipated to drive employment with a projected 12% increase from 2017 to 2027; during the same period, employment for the 24 other occupations in the Retail, Hospitality, and Tourism Sector is projected to decline 11%, as shown in Exhibit 15.

Exhibit 15: Retail, Hospitality, and Tourism Sector Employment Change, 2017-2027



Key occupations driving employment in the Retail, Hospitality, and Tourism Sector can be grouped into three broad categories:

Food Service

- **Food Service Managers (11-9051)**
- **Chefs and Head Cooks (35-1011)**
- **First-Line Supervisors of Food Preparation and Serving Workers (35-1012)**
- **Cooks, Institution and Cafeteria (35-2012)***
- **Cooks, Restaurant (35-2014)***
- **Food Preparation Workers (35-2021)***
- **Bartenders (35-3011)***
- **Fast Food and Counter Workers (35-3023)***
- **Waiters and Waitresses (35-3031)***
- **Food Servers, Nonrestaurant (35-3041)***
- **Dining Room and Cafeteria Attendants and Bartender Helpers (35-9011)***
- **Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop (35-9031)***
- **Food Preparation and Serving Related Workers, All Other (35-9099)***
- **Bakers (51-3011)***

Lodging and Accommodation

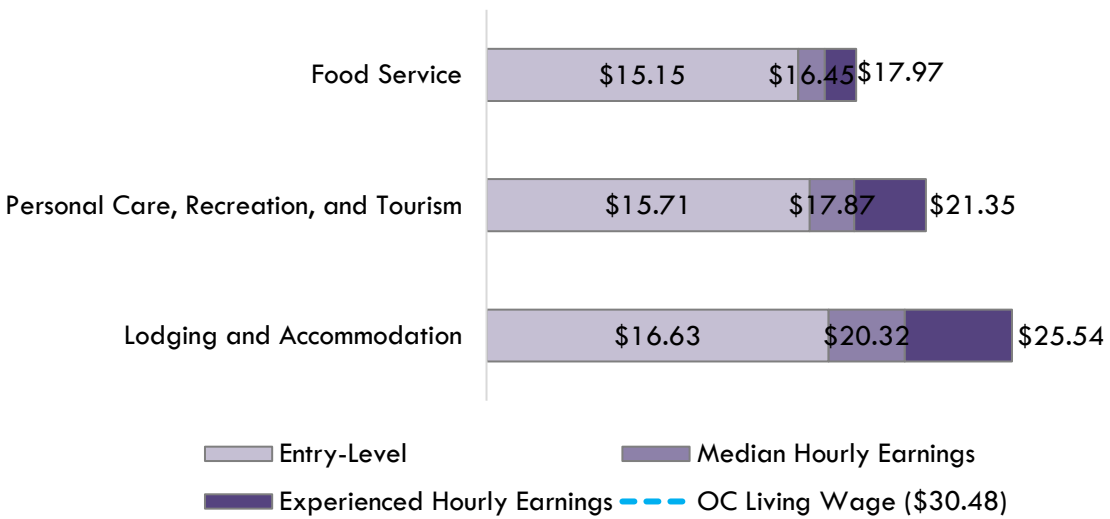
- **Lodging Managers (11-9081)**
- **First-Line Supervisors of Housekeeping and Janitorial Workers (37-1011)**
- **Hotel, Motel, and Resort Desk Clerks (43-4081)***

**Personal Care, Recreation,
and Tourism**

- *Entertainment and Recreation Managers, Except Gambling (11-9072)^*
- *Meeting, Convention, and Event Planners (13-1121)^*
- *First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services (39-1014)*
- *First-Line Supervisors of Personal Service Workers (39-1022)*
- *Gambling Dealers (39-3011)**
- *Tour and Travel Guides (39-7018)*
- *Recreation Workers (39-9032)**
- *Personal Care and Service Workers, All Other (39-9099)**
- *Reservation and Transportation Ticket Agents and Travel Clerks (43-4181)*

Wages for these high-growth occupations are relatively similar, with the Food Service group of occupations having the lowest entry-level hourly wages (\$15.15) and Lodging and Accommodation having the highest (\$16.63). Notably, entry-level, median, and experienced wages are significantly below Orange County’s living wage for all three groups. Exhibit 16 shows the wage range for these three groups.

Exhibit 16: Wages by Key Retail, Hospitality, and Tourism Key Occupation Group, Weighted by 2022 Jobs



These four key occupation groups comprise 52% of the Retail, Hospitality, and Tourism Sector's occupations and they accounted for 49% of the sector's online job postings over the past 12 months, as shown in Exhibit 17. Notably, 82% (8,076) of the postings are for the Food Service group.

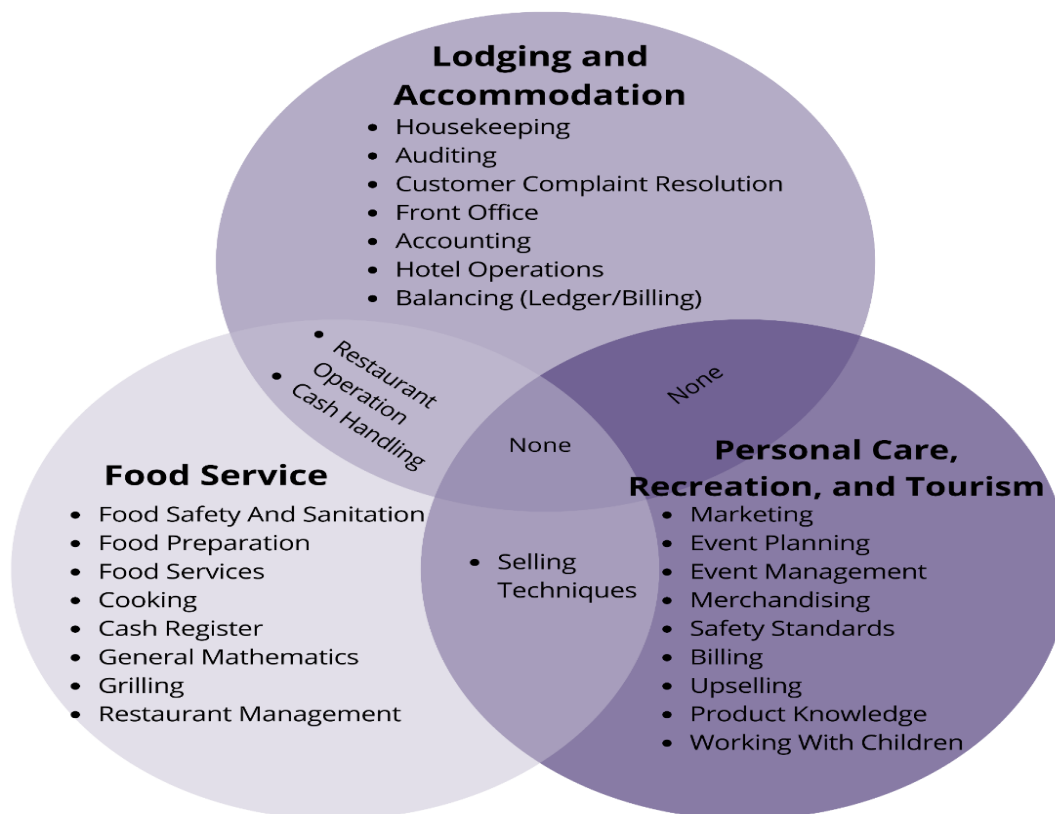
Exhibit 17: Number of Job Postings by Key Other Sector Occupation Group

Key Occupation Group	Number of Postings	% of Total Other Sector Postings
Food Service	19,321	82%
Lodging and Accommodation	2,272	10%
Personal Care, Recreation, and Tourism	1,988	8%
Total	25,581	61%

The skills requested by employers in online job postings for these occupations vary significantly. When considering the top 10 skills for each group, only three skills overlap between at least two groups: restaurant operation, cash handling, and selling techniques. There are numerous unique skills requested in online job postings for these three groups, as shown in

- **Food Service** skills include food safety, food preparation, and other restaurant operation skills.
- **Lodging and Accommodation** skills include various hotel operations and management skills.
- **Personal Care, Recreation, and Tourism** skills vary, with some related to event planning, others related to marketing/merchandising, and working with children.

Exhibit 18: Retail, Hospitality, and Tourism Sector Key Occupations Unique Skills Analysis



The following sections highlight trends, specific occupations, and examine emerging topics and areas for each of the three groups of key occupations driving employment in the Retail, Hospitality, and Tourism Sector.

Food Service

The Food Service group includes 14 key occupations:

- *Food Service Managers (11-9051)*
- *Chefs and Head Cooks (35-1011)*
- *First-Line Supervisors of Food Preparation and Serving Workers (35-1012)*
- *Cooks, Institution and Cafeteria (35-2012)**
- *Cooks, Restaurant (35-2014)**
- *Food Preparation Workers (35-2021)**
- *Bartenders (35-3011)**
- *Fast Food and Counter Workers (35-3023)**
- *Waiters and Waitresses (35-3031)**
- *Food Servers, Nonrestaurant (35-3041)**
- *Dining Room and Cafeteria Attendants and Bartender Helpers (35-9011)**
- *Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop (35-9031)**
- *Food Preparation and Serving Related Workers, All Other (35-9099)**
- *Bakers (51-3011)**

Only three of these occupations are considered middle-skill: *Food Service Managers (11-9051)*, *Chefs and Head Cooks (35-1011)*, and *First-Line Supervisors of Food Preparation and Serving Workers (35-1012)*.

Minimum Wage Increases

Wages for the occupations in the Food Service group have historically been low, with many workers in these occupations earning minimum wage, which is \$16 per hour in California.⁹ Currently, there are no cities in Orange County with a higher minimum wage.¹⁰ California has passed multiple pieces of legislation to increase the minimum wage for workers in specific industries. Assembly Bill 1228 (AB 1228), passed in September 2023, implemented a \$20 per hour minimum wage for “fast food restaurant employees,” which includes all workers at limited-service restaurants that are part of a restaurant chain with at least 60 establishments nationwide.¹¹ Approximately 27% of workers in the Food Service key occupation group are employed in limited-service restaurants (such as fast-food establishments) and could be impacted by this minimum wage increase.

Additionally, AB 1228 established a Fast Food Council, “which is empowered both to make future increases to the minimum wage and to adopt other minimum employment standards for fast food restaurants.”¹² The Fast Food Council includes owners of Wendy’s and El Pollo Loco franchise locations, a Cook Trainer from McDonald’s, and a Shift Leader at Jack in the Box and member of the California Fast Food Workers Union, among others.¹³ The council’s first meeting was on March 15, 2024 with additional meetings each month since July 2024. However, there has been no specific action regarding future minimum wage increases.

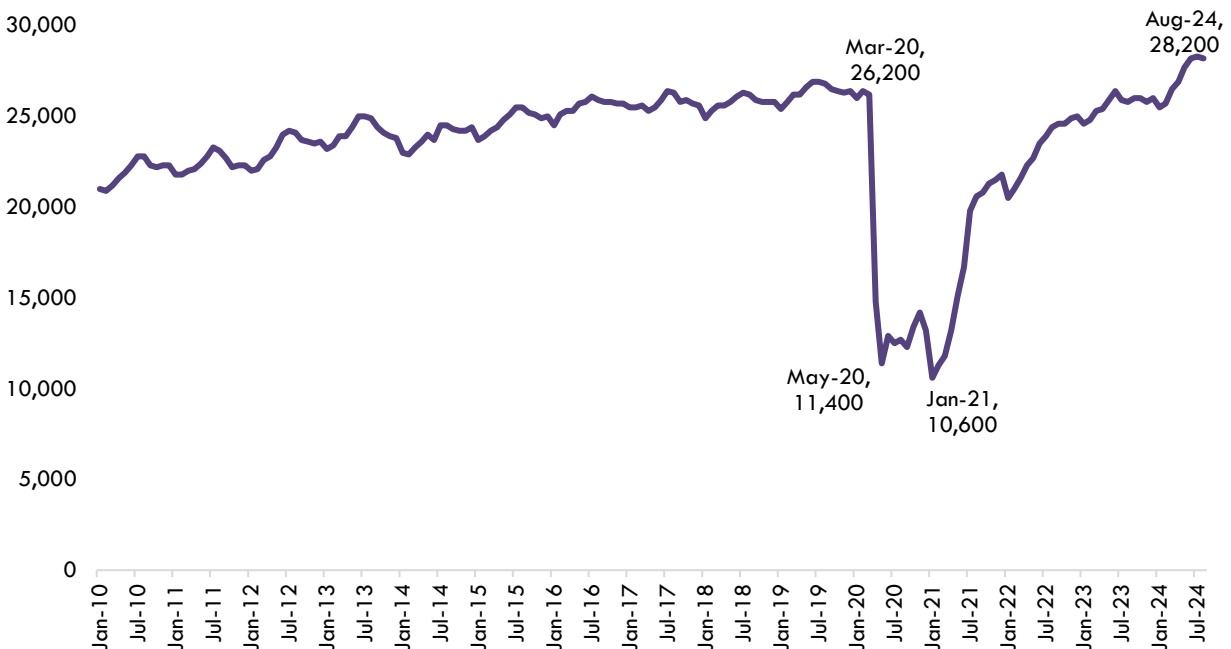
Lodging and Accommodation

There are three occupations in the Lodging and Accommodation key occupation group: *Lodging Managers (11-9081)*, *First-Line Supervisors of Housekeeping and Janitorial Workers (37-1011)*, and *Hotel, Motel, and Resort Desk Clerks (43-4081)**.

Worker Shortages

According to a report from Visit California, in 2023, travel spending in California fully recovered from the COVID-19 Pandemic and tourism spending in Orange County exceeded 2019 levels.¹⁴ Though travel spending and tourism have recovered, there continues to be reported shortages of hotel workers ranging from housekeepers to front desk clerks and managers.¹⁵ As shown in Exhibit 19, data from the Employment Development Department shows that employment in the Accommodation industry, which includes all jobs in places like hotels, bed-and-breakfasts, and other lodging options, recovered to pre-pandemic levels in Orange County in 2024, reaching a new high of 28,200 jobs in August 2024.¹⁶

Exhibit 19: Accommodation Industry Employment in Orange County, January 2010 – August 2024



To help address shortages, many hotels cut back on guest services. According to one survey, “more than one in four hotel operators said the front office function would be phased out of their properties within the next five years.”¹⁷ A May 2023 survey from the American Hotel & Lodging Association (AHLA) found that “75% of respondents are increasing wages, 64% are offering greater flexibility with hours, and 36% are expanding benefits – but 87% say they are still unable to fill open positions.”¹⁸

Personal Care, Recreation, and Tourism

The Personal Care, Recreation, and Tourism group of key occupations includes nine occupations:

- *Entertainment and Recreation Managers, Except Gambling (11-9072)*[^]
- *Meeting, Convention, and Event Planners (13-1121)*[^]
- *First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services (39-1014)*
- *First-Line Supervisors of Personal Service Workers (39-1022)*
- *Gambling Dealers (39-3011)*^{*}
- *Tour and Travel Guides (39-7018)*
- *Recreation Workers (39-9032)*^{*}
- *Personal Care and Service Workers, All Other (39-9099)*^{*}
- *Reservation and Transportation Ticket Agents and Travel Clerks (43-4181)*

Amusement Park and Resort Employment

The Disneyland Resort in Anaheim is the largest employer in Orange County, employing approximately 34,000 people as of 2023 and attracting 17.2 million visitors in 2023, the second largest of any amusement park in the world.^{19,20} Orange County is also home to Knott’s Berry Farm, making it a premier destination for tourists. As of summer 2024, attendance at these amusement parks has nearly completely returned to pre-pandemic levels. Correspondingly, employment in the amusement, gambling, and recreation industry has also completely recovered.

To attract, retain, and promote workers, these companies invest significant resources and offer various external and internal-facing training programs. The Disney Imagination Campus “inspires the next generation of creative thinkers and doers with our enriching educational workshops and youth programs”²¹

and Knott's Berry Farm offers "educational programs cover everything from physics, science, and math to early American history."²²

Additionally, Disney offers tuition assistance for full- and part-time employees through the Disney Aspire Program. Two Orange County educational institutions – Fullerton College and California State University Fullerton (CSUF) – are Disney Aspire Program partners, offering degree options across various fields of study.²³ Though Disney recently enacted an annual funding cap of \$5,250 for some partner school, Fullerton College and CSUF are not yet subject to the annual funding cap.²⁴ Nearly 30,000 employees in California qualify for the program.²⁵

In April 2024, the Anaheim City Council unanimously approved Disneyland Forward, a proposal to expand Disneyland which is estimated "to bring nearly \$2 billion to Anaheim over the next decade."²⁶ Disney estimates that Disneyland Forward will "bring over 4,500 operational jobs to Disneyland Resort...along with nearly 9,000 construction jobs within the first 10 years." This large expansion could provide more opportunities for Retail, Hospitality, and Tourism jobs and Orange County community colleges could consider additional partnerships with Disney to meet their workforce needs.



RETAIL, HOSPITALITY, AND TOURISM SUPPLY

Orange County’s educational institutions provide programs tailored to equip students with skills suited for different levels of occupations within the Retail, Hospitality, and Tourism sector. The following visuals outline the number of awards conferred by both community colleges and non-community colleges, program observations from COCI²⁷, as well as the regional programs and institutions that have conferred the most awards.



5,161

community college awards



5,134

non-community college awards



10,295

total awards conferred

COCI Observations

- There are 128 unique Retail, Hospitality, and Tourism programs offered by Orange County community colleges.
- Most programs (59%) are for Certificates of Achievement, distantly followed by associate and associate for transfer degrees (32%) and noncredit awards (9%).
- Orange Coast offers the most Retail, Hospitality, and Tourism programs (38), followed by Saddleback (25) and Cypress (24).
- The plurality of Retail, Hospitality, and Tourism programs are listed under the 1306.30 Culinary Arts (17%), followed by 1307.00 Hospitality (13%) and 1302.00 Interior Design and Merchandising (10%).

Top Program Awards

Community College:
 Business Administration: 2,538
 Administration of Justice: 507
 Fire Technology: 386
 Cosmetology and Barbering: 375
 Business Management: 345

Non-Community College:
 Business Administration and Management, General: 4,679
 Sport and Fitness
 Administration/Management: 397
 Interior Design: 54
 Interior Architecture: 3
 E-Commerce/Electronic Commerce: 1

Most Awards

Community College:
 Santa Ana: 778
 Fullerton: 680
 Saddleback: 655
 Orange Coast: 600
 Coastline: 587

Non-Community College:
 California State University-Fullerton: 2,404
 University of California-Irvine: 528
 Chapman University: 524
 Concordia University-Irvine: 512
 Westcliff University: 473

Community College Student Outcomes

Orange County community college students account for 14% of all Retail, Hospitality, and Tourism community college students in California. The visuals below show the Strong Workforce Program (SWP) metrics for the Retail, Hospitality, and Tourism sector in Orange County.²⁸



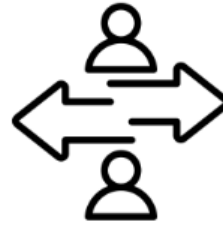
5,081

SWP Students
(2021-22)



372

SWP Students Who
Earned a Degree or
Certificate or Attained
Apprenticeship Journey
Status (2021-22)



245

SWP Students Who
Transferred to a Four-
Year Postsecondary
Institution (2019-20)

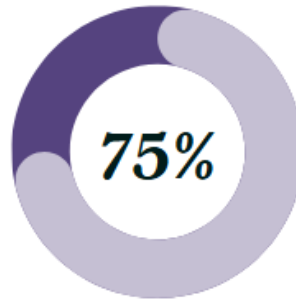


\$34,144

Median Annual Earnings
for SWP Exiting Students
(2020-21)



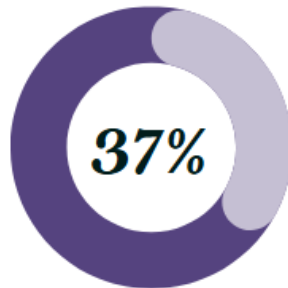
SWP Students Who
Earned 9 or More Career
Education Units in the
District in a single Year
(2021-22)



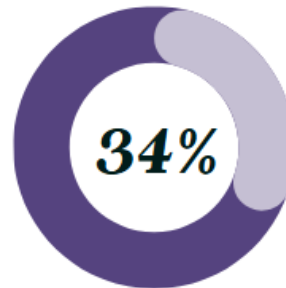
SWP Students Who
Completed a Noncredit CTE
or Workforce Preparation
Course (2021-22)



SWP Students with a Job
Closely Related to Their
Field of Study (2019-20)



Median Change (Gain) in
Earnings for SWP Exiting
Students (2020-21)



SWP Exiting Students Who
Attained the Living Wage
(2020-21)

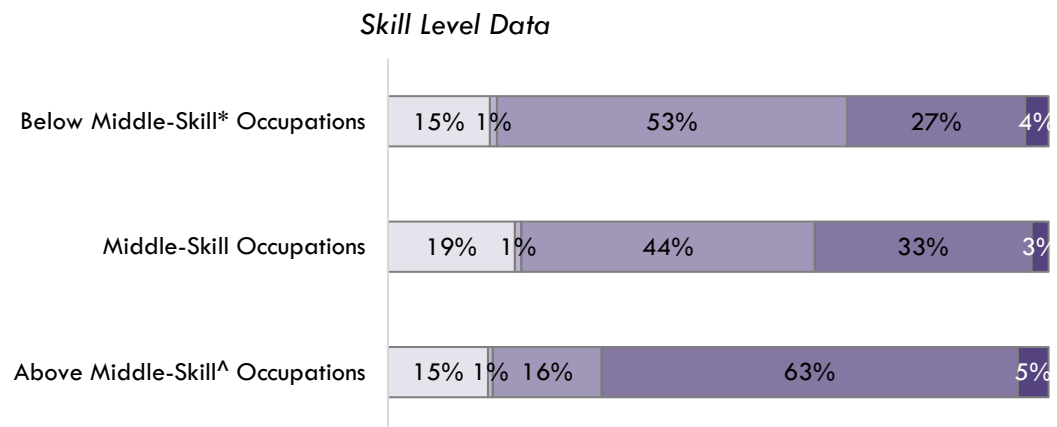
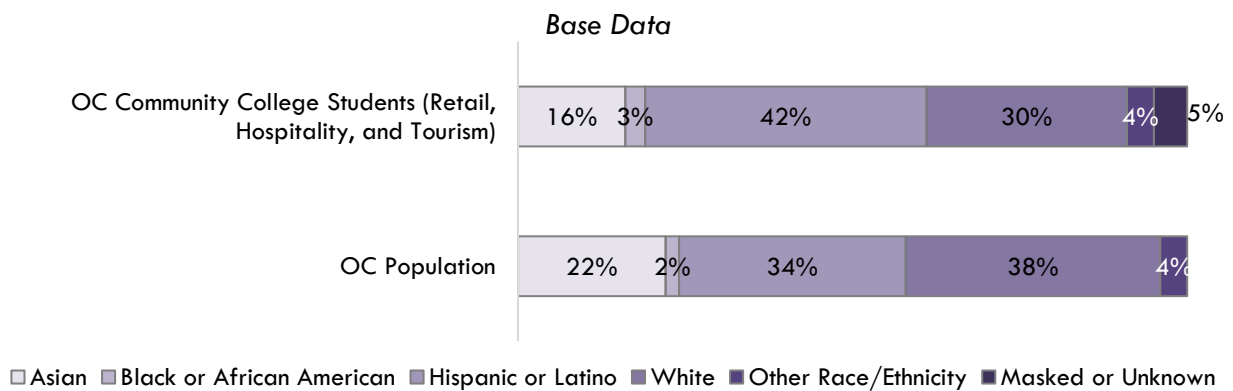
DEMOGRAPHICS

Ethnicity

Exhibit 20 shows the ethnicity of Orange County community college students enrolled in Retail, Hospitality, and Tourism programs compared to the overall Orange County population and the three skill-level occupational groups. Notably, 42% of Retail, Hospitality, and Tourism students are Hispanic or Latino, which is higher than the population (34%), and significantly higher than workers in above middle-skill occupations (16%). Conversely, 63% of workers in these above middle-skill occupations are white, which is higher than the population (38%), and community college Retail, Hospitality, and Tourism students (30%).

More than half (53%) of workers in below middle-skill occupations are Hispanic or Latino; nearly half (44%) of workers in middle-skill occupations are Hispanic or Latino.

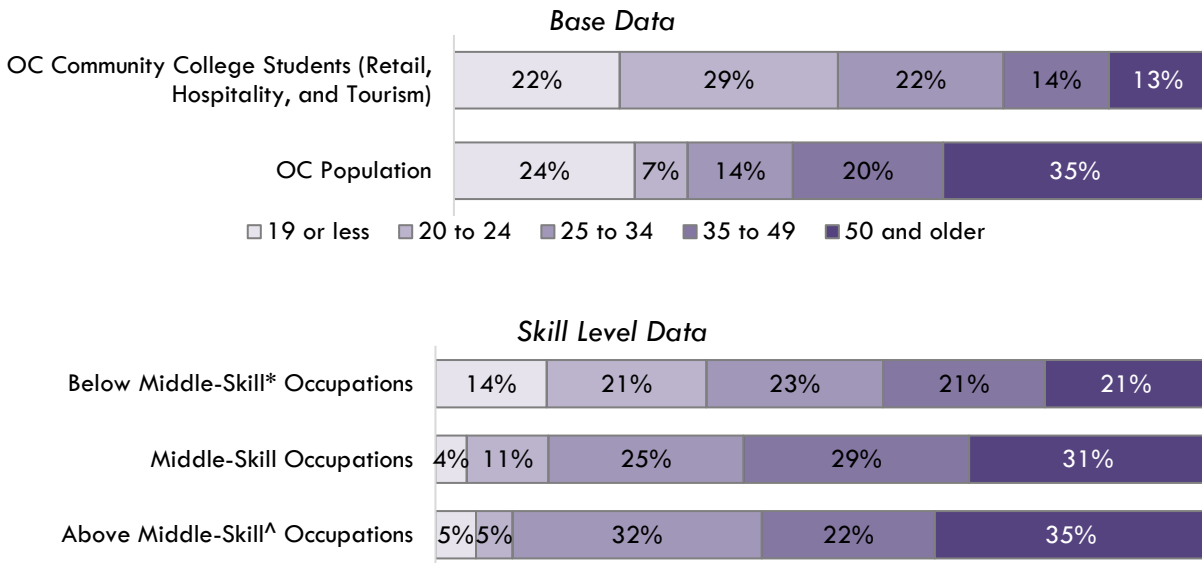
Exhibit 20: Retail, Hospitality, and Tourism Sector Demographics by Ethnicity



Age Group

Exhibit 21 shows the age of Orange County community college students enrolled in Retail, Hospitality, and Tourism programs compared to the overall Orange County population and the three skill-level occupational groups. At least 23% of workers in each of the three skill level occupations are 25 to 34, which is higher than the population (14%) and community college Retail, Hospitality, and Tourism students (22%). In terms of majority within its skill level, 31% of middle-skill workers and 35% of above middle-skill workers are 50 and older, while 23% of below middle-skill workers are age 25 to 34. More than half (51%) of community college Retail, Hospitality, and Tourism students are 24 years or younger, which is higher than the population (31%) and each of the three skill level occupations (between 10% and 35%).

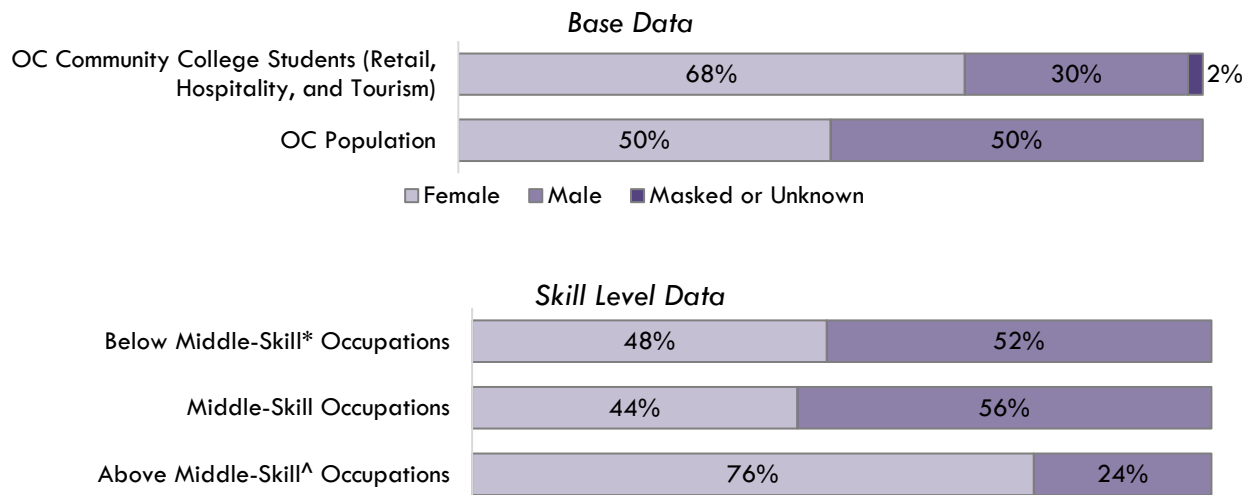
Exhibit 21: Retail, Hospitality, and Tourism Sector Demographics by Age Group



Sex

Exhibit 22 shows the sex of Orange County community college students enrolled in Retail, Hospitality, and Tourism programs compared to the overall Orange County population and the three skill-level occupational groups. Though the population is split evenly, 68% of Retail, Hospitality, and Tourism students and between 44% and 76% of workers in these occupations are women.

Exhibit 22: Retail, Hospitality, and Tourism Sector Demographics by Sex



PUBLIC POLICY AND FUNDING OPPORTUNITIES

The Retail, Hospitality, and Tourism sector spans across multiple industries. Though they work synchronously to provide goods and services to shared clientele, applicable regulations may vary by industry and/or occupation. Bearing this in mind, this section samples policies and funding opportunities within this sector, industry, and/or occupation-specific settings.

Federal Policies

Though typically under state and/or industry purview, qualification and training requirements are federally regulated for some occupations (e.g., *Flight Attendants*[#]). Listed below are a few federal policies securing workers' rights and a sample of industry-specific regulations impacting occupational requirements and qualifications:

- **Fair Labor Standards Act of 1938:** Instituted standards for overtime and minimum wage, recordkeeping, and youth employment. As of July 24, 2009, the federal, hourly minimum wage is \$7.25.²⁹
- **Occupational Safety and Health Act of 1970:** Created the Occupational Safety and Health Administration, which provides workplace safety standards and protections for workers.³⁰
- **Title 14 of the Code of Federal Regulations, Part 121:** Provides operating standards for air carriers, and details aviator and crewmember training requirements and qualifications.³¹
- **Railway Labor Act:** Aims to circumvent any disruption to interstate commerce by furnishing the quick resolution of disputes between rail or airline carriers and their employees, while also securing employees' right to bargain collectively and organize.³²

Though federal policy secures a \$7.25 hourly minimum wage for workers, California minimum wage rates a range from \$16.00 to \$23.00 per hour depending on industry and employment type. For greater information on California's minimum wage rates pertinent to many occupations across this sector, refer to [Food Service](#) section of this report.



State Policies

In addition to protecting workers' rights in the workplace, state legislation regulates how businesses and other entities (e.g., tribal governments) operate within the retail, hospitality, and tourism sector as detailed in the below legislation and compacts:

- **California Fair Employment and Housing Act:** Extends employment protections against discrimination or harassment due to ancestry, disability, marital status, and race, amongst other covered categories.³³
- **California Alcoholic Beverage Control Act:** Details standards concerning the alcoholic beverage industry, including licensing, beverage-specific, and *on-sale* and *off-sale* regulations.³⁴ The Act contains a portion of the basis in which licensees and their employees can be held responsible for civil, criminal, and administrative liabilities.³⁵
- **California Tourism Marketing Act of 1995:** Allowed for the tourism industry to examine itself to engage marketing across the state. The industry held a referendum in 1998, resulting in the creation of the Tourism Assessment Program and founding the California Travel and Tourism Commission “as the first-of-its-kind destination marketing organization in the nation”.³⁶
- **Tribal-State Gaming Compacts:** Agreements which authorize Class III gaming operations by tribal governments within their respective jurisdictions, outline how many casinos and gaming devices a tribe may operate, acknowledge tribal governments’ fundamental roles, formalizes procedures and requirements to effectively regulate Class III gaming, and sets mechanisms for dispute resolution.³⁷

Though there are currently no casinos in Orange County, many operate in its surrounding areas. Across the state, 63 tribal governments operate 66 casinos, and of these Tribes, 52 hold Tribal-State Gaming Compacts and the remaining 11 Tribes have Secretarial Procedures.³⁸ Secretarial Procedures permit Tribes to operate Class III gaming without a Tribal-State Gaming Compact after having received a court order ascertaining the state failed to negotiate Class III gaming in a bona fide manner.³⁹

Funding Opportunities

Several federal and local financial initiatives are available for further investment in the Retail, Hospitality, and Tourism sector. While not an exhaustive list, the following provides a sample of available sector-specific funding opportunities:

- **Retail Food Safety Regulatory Association Collaboration CAP:** Cooperative agreement purposed towards studying retail food protection practices, their advancement, and the identification of opportunities towards the incidence reduction of food-borne illness risks.⁴⁰
- **Tribal Tourism Grant Program:** Provides Tribal organizations or governments with funds to implement tourism projects that have a nexus with economic development to garner substantial benefits for the community.⁴¹
- **Disneyland Resort Workforce Development Initiative:** Offers Anaheim students and residents career readiness and mentoring opportunities, and awards local school districts and nonprofits workforce development grants that have totaled over \$7.5 million in financial assistance since 2017.⁴²



APPENDIX A: METHODOLOGY

Traditional Labor Market Data Methodology

The COE analyzed traditional labor market demand information, which includes job counts, projections, wages, typical education requirements, for the Retail, Hospitality, and Tourism sector. Traditional labor market demand data was sourced from Lightcast (Datarun 2023.4), a labor market analytics firm that aggregates data from public statistical agencies including the Bureau of Labor Statistics, Census Bureau, and the California Employment Development Department. Living wage data was sourced from the Insight Center California Family Needs Calculator.⁴³ The traditional labor market demand data analyzed in this report includes:

- **2022 Jobs:** the number of jobs by industry and occupation in 2022.
- **2027 Jobs:** the projected number of jobs by industry and occupation in 2027. Projections are based on the assumption that past trends will continue into the future, including the assumption that the economy, during the projection period, will be at approximately full employment. Projections do not consider potential recessions or labor shocks, such as natural disasters or pandemics, and are intended to capture structural change in the economy over time.
- **Change:** the projected change in the number of jobs, expressed as an actual number and a percentage.
- **Average Annual Openings (Demand):** the projected number of annual job openings. This figure is the sum of job growth and replacement jobs. Job growth is the result of job creation while replacement jobs are the result of retirements and workers leaving the filled, creating the need to hire a replacement.
- **Hourly Wages:**
 - **Entry-level (25th percentile):** the typical entry-level wages for an occupation; 25% of workers earn less than this amount and 75% earn more.
 - **Median:** the median wages for an occupation; 50% of workers earn less than this amount and 50% earn more.
 - **Experienced (75th percentile):** the typical experienced-level wages for an occupation; 75% of workers earn less than this amount and 25% earn more.
- **Typical Entry-Level Education:** represents the typical education level needed to enter an occupation.
- **Educational Attainment:** the percentage of workers employed in an occupation by their highest level of education attained.

Demographic data for the Orange County population comes from the Census Bureau's American Community Survey (5-Year Estimates, 2018-2022). Demographic data for occupations was sourced via IPUMS USA and student demographic data was sourced from the LaunchBoard Community College Pipeline (2020-21 Academic Year).^{44,45}

The COE also analyzed labor market supply data that is calculated using the number of awards conferred in related training programs at community college and non-community college institutions over the past three years of available data. Community college data is sourced from the California Community College Chancellor's Office Data Mart⁴⁶ and includes the years 2020-2023; non-community college data is sourced from the Integrated Postsecondary Education Data System and includes the years 2019-2022.⁴⁷

Job Postings Analysis Methodology

In addition to traditional labor market information, the COE analyzed real-time labor market information using online job postings data sourced from Lightcast (Datarun 2024.3). The job postings data in this report covers the last 12 months of available data (October 2023 – September 2024). This data is derived from online job postings that are parsed and classified into industry and occupational groups using natural language processing (NLP) to determine the related company, industry, occupation, and other information for each job posting. Online job postings do not equate to labor market demand or replace traditional labor market data. They should only be considered a supplement to traditional LMI.

APPENDIX B: SECTOR OCCUPATIONS

SOC	Occupation
27-1026	Merchandise Displayers and Window Trimmers*
35-2011	Cooks, Fast Food*
35-2012	Cooks, Institution and Cafeteria*
35-2014	Cooks, Restaurant*
35-2015	Cooks, Short Order*
35-2019	Cooks, All Other*
35-2021	Food Preparation Workers*
35-3011	Bartenders*
35-3023	Fast Food and Counter Workers*
35-3031	Waiters and Waitresses*
35-3041	Food Servers, Nonrestaurant*
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers*
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop*
35-9099	Food Preparation and Serving Related Workers, All Other*
39-3011	Gambling Dealers*
39-3012	Gambling and Sports Book Writers and Runners*
39-3019	Gambling Service Workers, All Other*
39-3093	Locker Room, Coatroom, and Dressing Room Attendants*
39-3099	Entertainment Attendants and Related Workers, All Other*
39-6011	Baggage Porters and Bellhops*
39-6012	Concierges*
39-9032	Recreation Workers*
39-9099	Personal Care and Service Workers, All Other*
41-2012	Gambling Change Persons and Booth Cashiers*
41-2031	Retail Salespersons*
41-9011	Demonstrators and Product Promoters*
43-3041	Gambling Cage Workers*
43-4081	Hotel, Motel, and Resort Desk Clerks*
51-3011	Bakers*
51-3021	Butchers and Meat Cutters*
51-6092	Fabric and Apparel Patternmakers*
11-9051	Food Service Managers
11-9071	Gambling Managers
11-9081	Lodging Managers
35-1011	Chefs and Head Cooks
35-1012	First-Line Supervisors of Food Preparation and Serving Workers
35-2013	Cooks, Private Household
37-1011	First-Line Supervisors of Housekeeping and Janitorial Workers
39-1013	First-Line Supervisors of Gambling Services Workers
39-1014	First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services
39-1022	First-Line Supervisors of Personal Service Workers
39-7018	Tour and Travel Guides
41-1011	First-Line Supervisors of Retail Sales Workers
41-3041	Travel Agents
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks
53-2031	Flight Attendants#
11-9072	Entertainment and Recreation Managers, Except Gambling^
13-1121	Meeting, Convention, and Event Planners^
27-1022	Fashion Designers^
27-1025	Interior Designers^

■ Below Middle-Skill* Occupations

■ Middle-Skill Occupations

■ Above Middle-Skill^ Occupations

APPENDIX C: TOP CODES

TOP Code	Program Name	TOP Code	Program Name
0104.00	Viticulture, Enology and Wine Business*	1303.00	Fashion
0109.20	Floriculture/Floristry*	1303.10	Fashion Design
0109.40	Turfgrass Technology*	1303.20	Fashion Merchandising
0115.10	Parks and Outdoor Recreation*	1303.30	Fashion Production*
0501.00	Business and Commerce, General*	1306.00	Nutrition, Foods, and Culinary Arts*
0505.00	Business Administration*	1306.20	Dietetic Services and Management*
0506.00	Business Management*	1306.30	Culinary Arts
0506.40	Small Business and Entrepreneurship*	1307.00	Hospitality
0506.50	Retail Store Operations and Management	1307.10	Restaurant and Food Services and Management
0509.40	Sales and Salesmanship*	1307.20	Lodging Management
0509.60	Display	1307.30	Resort and Club Management
0509.70	E-Commerce (Business emphasis) *	2102.00	Public Administration*
0514.40	Office Management^	2105.00	Administration of Justice*
0516.00	Labor and Industrial Relations^	2105.30	Industrial and Transportation Security*
0606.00	Public Relations^	2105.40	Forensics, Evidence, and Investigation*
0614.00	Digital Media*	2133.00	Fire Technology*
0835.60	Coaching*	2206.10	Geographic Information Systems*
0835.70	Aquatics and Lifesaving^	3007.00	Cosmetology and Barbering*
0836.10	Recreation Assistant*	3008.00	Dry Cleaning^
0959.10	Diving and Underwater Safety^	3009.00	Travel Services and Tourism
1301.00	Family and Consumer Sciences, General^	3020.40	Flight Attendant
1301.10	Consumer Services^	3099.00	Other Commercial Services*
1302.00	Interior Design and Merchandising		

Note: Eight (8) programs are denoted with a caret (^). The supply for these programs was removed from the Retail, Hospitality, and Tourism Sector Profile because none of the 50 occupations in this report crosswalk to any of these eight programs even though the Chancellor's Office considers them Retail, Hospitality, and Tourism Sector programs.

Twenty-four (24) programs above are denoted with an asterisk (*). The supply for these 24 TOP codes were added to the Retail, Hospitality, and Tourism Sector Profile because they crosswalk to Retail, Hospitality, and Tourism Sector occupations, even though the Chancellor's Office assigned the TOP code to a different sector. In the last Community College Chancellor's Office [TOP code inventory](#), Fashion Production (1303.30) is assigned to Advanced Manufacturing; Viticulture, Enology and Wine Business (0104.00), Floriculture/Floristry (0109.20), Turfgrass Technology (0109.40), and Parks and Outdoor Recreation (0115.10) are assigned to Agriculture, Water, and Environmental Technologies; Business and Commerce, General (0501.00), Business Administration (0505.00), Business Management (0506.00), Small Business and Entrepreneurship (0506.40), Sales and Salesmanship (0509.40), E-Commerce (Business emphasis) (0509.70), and Cosmetology and Barbering (3007.00) are assigned to Business and Entrepreneurship; Coaching (0835.60) and Recreation Assistant (0836.10) are assigned to Education and Human Development; Nutrition, Foods, and Culinary Arts (1306.00) and Dietetic Services and Management (1306.20) are assigned to Health; Digital Media (0614.00) and Geographic Information Systems (2206.10) are assigned to Information and Communication Technologies/Digital Media; Administration of Justice (2105.00), Industrial and Transportation Security (2105.30), Forensics, Evidence, and Investigation (2105.40) and Fire Technology (2133.00) are assigned to Public Safety; and Public Administration (2102.00) and Other Commercial Services (3099.00) are assigned to Other/Unassigned.

APPENDIX D: END NOTES

- ¹ "OC Sector Profile Supplemental Appendices: Retail, Hospitality, and Tourism," Orange County Center of Excellence for Labor Market Research, last modified October 29, 2024, <https://coecc.net/orange-county/2024/10/oc-sector-profile-supplemental-appendices-retail-hospitality-and-tourism/>.
- ² "Orange County Labor Market Overview," Orange County Center of Excellence for Labor Market Research, last modified November 16, 2023, <https://coecc.net/orange-county/2023/11/orange-county-labor-market-overview/>.
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- ⁴ "Disneyland, Knott's, SoCal Theme Park Attendance Returns to Pre-pandemic Levels," Spectrum News, last modified August 17, 2024, <https://spectrumnews1.com/ca/southern-california/entertainment/2024/08/17/disneyland--knott-s--social-theme-park-attendance-returns-to-pre-pandemic-levels>.
- ⁵ Elizabeth Trovall, "Some Restaurant Owners Struggle Despite Growth in Food Service Sales," Marketplace, last modified August 15, 2023, <https://www.marketplace.org/2023/08/15/some-restauranters-are-struggling-despite-food-service-sales-growth/>.
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- ¹² *Ibid.*
- ¹³ "Governor Newsom Announces Appointments 3.1.24," Governor of California, last modified June 17, 2024, <https://www.gov.ca.gov/2024/03/01/governor-newsom-announces-appointments-3-1-24/>.
- ¹⁴ "2023 Travel Spending in California Fully Recovered from Pandemic," Visit California, accessed October 15, 2024, <https://media.visitcalifornia.com/story-inspiration/press-releases/2024-california-tourism-month>.
- ¹⁵ Augusta Saraiva, "Why U.S. Hotels Are Missing More Than 238,000 Employees," Los Angeles Times, last modified September 22, 2023, <https://www.latimes.com/business/story/2023-09-22/why-u-s-hotels-are-missing-more-than-238-000-employees>.
- ¹⁶ EDD Data: <https://labormarketinfo.edd.ca.gov/data/employment-by-industry.html>
- ¹⁷ *Ibid.*
- ¹⁸ "82% of Surveyed Hotels Report Staffing Shortages," AHLA, accessed October 15, 2024, <https://www.ahla.com/news/82-surveyed-hotels-report-staffing-shortages>.
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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.

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