

LABOR MARKET ANALYSIS

FOR PROGRAM RECOMMENDATION



C·O·E

CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

HOSPITALITY AND TOURISM IN THE FAR NORTH

Far North
Center of Excellence

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SUMMARY

The Far North Center of Excellence for Labor Market Research prepared this report to provide a labor market analysis of educational supply and occupational demand for middle-skilled careers in the Far North subregion. This report aims to determine if demand in the local labor market is unmet by the supply from existing community college programs and other postsecondary training providers.

This report primarily focuses on training that leads to jobs in middle-skilled occupations - jobs that typically require education beyond a high school diploma but less than a Bachelor's degree - but may include higher-skilled occupations for training pathways that lead to a bachelor's degree. Lowered skilled occupations are rarely considered in this analysis due to the lessened barriers for entry-level work, such as no formal education and few on-the-job training requirements.

Key findings include:

- The Far North held 1,624 hospitality and tourism jobs in 2021. Hospitality and tourism jobs are projected to increase by 15% over the next five years, adding 237 new jobs to the subregion by 2026.
- Over the next five years, hospitality and tourism jobs are projected to have 249 annual openings in the Far North subregion.
- Wage data shows that hospitality and tourism jobs earn \$4 to \$8 above the subregion's living wage of \$12.74 per hour. Median wages are between \$1 above and \$5 below the living wage for a small family (\$24.66 per hour).
- Awards data analysis shows that Far North training providers conferred an average of five awards (certificates and associate degrees) in hospitality and tourism programs over the last three academic years.

Recommendations include:

- The Far North Center of Excellence recommends moving forward with the program.

INTRODUCTION

The Far North Center of Excellence (COE) was asked to provide labor market information for a proposed program at a regional community college. This report focuses on the following Standard Occupational Classification (SOC) occupations and codes:

- These middle-skill occupations require more education and training beyond a high school diploma but less than a four-year degree:
 - Food Service Managers (11-9051)
 - Lodging Managers (11-9081)
 - First-Line Supervisors of Housekeeping and Janitorial Workers (37-1011)
 - First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services (39-1014)
- Students who transfer and earn a four-year degree could pursue the following high-skill occupation:
 - Meeting, Convention, and Event Planners (13-1121)

A review of related programs revealed the following Taxonomy of Programs (TOP) title(s) and code(s) are appropriate for inclusion in this report:

- Hospitality (1307.00)
- Restaurant and Food Services and Management (1307.10)
- Lodging Management (1307.20)
- Resort and Club Management (1307.30)
- Viticulture, Enology, and Wine Business (0104.00)

The corresponding Classification of Instructional Program (CIP) title(s) and code(s) are:

- Hospitality Administration/Management, General (52.0901)
- Resort Management (52.0906)
- Meeting and Event Planning (52.0907)
- Hotel/Motel Administration/Management (52.0904)

OCCUPATIONAL DEMAND

Exhibit 1 summarizes the five-year projected job growth for middle-skill and high-skill occupations in the Far North, North/Far North, and California.

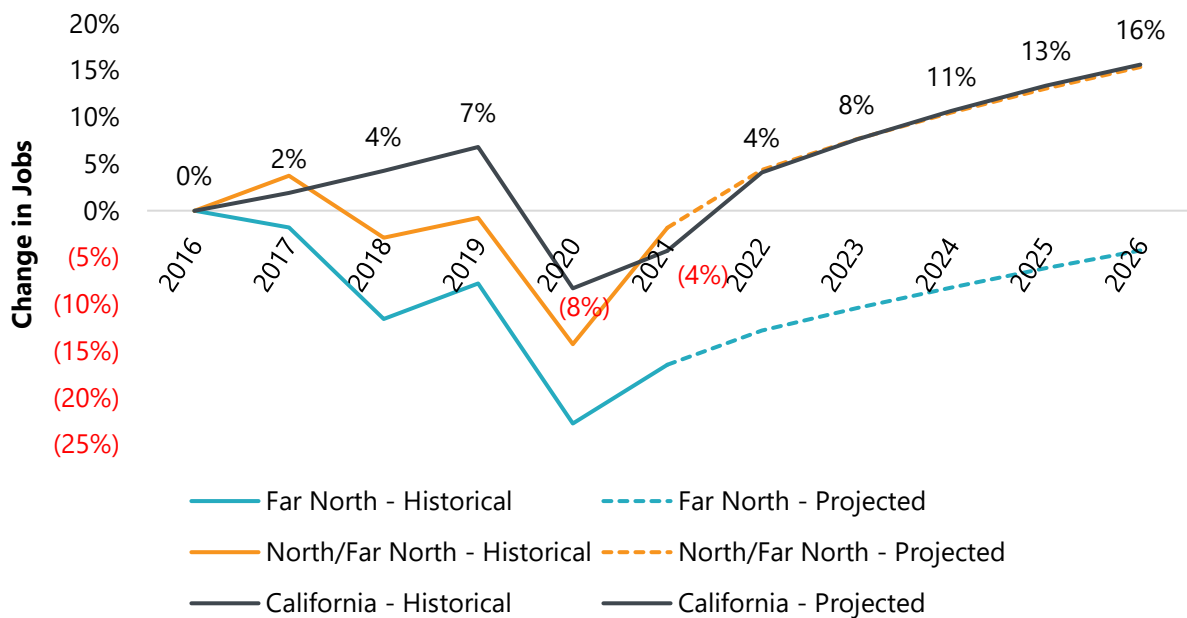
Exhibit 1. Employment and projected demand, 2021-2026

Occupation	2021 Jobs	2026 Jobs	2021-2026 Change	2021-2026 % Change	2021-2026 Annual Openings
Food Service Managers	648	744	96	15%	103
Lodging Managers	270	309	40	15%	40
First-Line Supervisors of Housekeeping and Janitorial Workers	279	307	28	10%	39
Meeting, Convention, and Event Planners	247	282	34	14%	34
First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	180	220	40	22%	33
Far North	1,624	1,861	237	15%	249
Food Service Managers	3,721	4,382	661	18%	623
Lodging Managers	634	755	120	19%	101
First-Line Supervisors of Housekeeping and Janitorial Workers	1,230	1,421	191	16%	188
Meeting, Convention, and Event Planners	1,270	1,453	182	14%	177
First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	816	1,005	189	23%	150
North/Far North	7,672	9,015	1,343	18%	1,240

Occupation	2021 Jobs	2026 Jobs	2021-2026 Change	2021-2026 % Change	2021-2026 Annual Openings
Food Service Managers	49,014	60,557	11,542	24%	8,965
Lodging Managers	5,594	6,679	1,085	19%	969
First-Line Supervisors of Housekeeping and Janitorial Workers	21,498	24,461	2,963	14%	3,235
Meeting, Convention, and Event Planners	16,573	19,451	2,879	17%	2,443
First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	8,654	11,256	2,602	30%	1,764
California	101,333	122,403	21,070	21%	17,375

Exhibit 2 compares the percent change in jobs between 2016 through 2021 and the projected changes through 2026. The rate of change is indexed to the total number of jobs in 2016.

Exhibit 2. Changes in employment, 2016-2026



WAGES

Exhibit 3 compares the entry-level, median, and experienced wages for the selected occupations to the Far North living wage for a single adult (\$12.74 per hour) and a small family (\$24.66 per hour).^{1,2}

Exhibit 3. Comparison of wages by occupation, 2021



¹ Living wage is defined as the level of income a single adult with no children must earn to meet basic needs, including food, housing, transportation, healthcare, taxes, and other miscellaneous basic needs. Please note that the 25th-percentile and 75th-percentile hourly wages are used as proxy for entry-level and experienced-level wages.

² A small family is defined as a single adult and one school aged child (between the ages of 5 and 12 years).

JOB POSTINGS

This section analyzes recent data from online job postings (real-time LMI). Online job postings may provide additional insight into recent changes in the labor market that are not captured by historical trends.

The Far North COE identified 537 online job postings for the selected occupations in the 15-county Far North subregion. Job posting data comes from Lightcast (formerly EMSI Burning Glass Labor Insights) and represents unique listings posted online within the last year, from February 1, 2022, to January 31, 2023.

Occupations and Job Titles

Exhibit 4 details the number of online job postings for the selected occupations.

Exhibit 4. Number of job postings by occupation

Occupation	Job Postings	Share of Job Postings
Food Service Managers	407	76%
Meeting, Convention, and Event Planners	51	10%
First-Line Supervisors of Housekeeping and Janitorial Workers	40	7%
Lodging Managers	39	7%
Total Job Postings	537	100%

Exhibit 5 shows the top 10 relevant job titles with the most job postings.

Exhibit 5. Top jobs titles

Job Title	Job Postings	Share of Job Postings
Assistant Managers	52	21%
General Managers	41	16%
Restaurant General Managers	37	15%
Shift Managers	32	13%
Restaurant Managers	30	12%

Job Title	Job Postings	Share of Job Postings
Assistant General Managers	21	8%
Food and Beverage Managers	13	5%
Department Managers	12	5%
Directors of Nutrition Services	12	5%

Employers

Exhibit 6 shows the top 10 relevant employers with the most job postings for the selected occupations.

Exhibit 6. Employers with the most job postings

Employer	Job Postings	Share of Job Postings
Burger King	38	21%
Taco Bell	31	17%
McDonald's	21	11%
Buffalo Wild Wings	18	10%
Panda Express	15	8%
Kentucky Fried Chicken	14	8%
Round Table Pizza	13	7%
Pilot Company	13	7%
Starbucks	11	6%
Sonic Drive-In	11	6%

Certifications, Skills, and Experience

Exhibit 7 shows the most relevant certifications requested by employers for the selected occupations.

Exhibit 7. Most in-demand certifications

Certification	Job Postings	Share of Job Postings
ServSafe Certification	68	59%
Certified Dietary Manager (CDM)	19	16%
Registered Dietitian (RD/RDN)	13	11%
Food Handler's Card	9	8%
Cardiopulmonary Resuscitation (CPR) Certification	7	6%

Exhibit 8 shows the top 10 skills across three categories for the studied occupations: specialized, essential, and software skills.³

Exhibit 8. Most in-demand skills

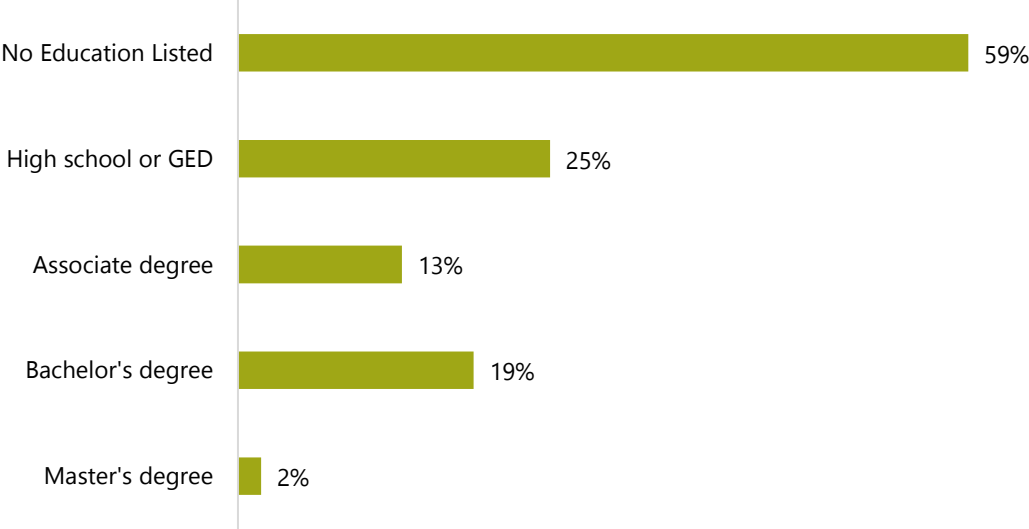
Top 10 Specialized Skills	Top 10 Essential Skills	Top 10 Software Skills
Restaurant Operation	Customer Service	Microsoft Outlook
Restaurant Management	Management	Microsoft Excel
Food Safety And Sanitation	Leadership	Microsoft Office
Food Services	Communications	Microsoft Word
Cooking	Operations	Applicant Tracking Systems
Marketing	Sales	Inventory Management System
Profit And Loss (P&L) Management	Planning	Zoom (Video Conferencing Tool)

³ Specialized skills are those primarily required to perform specific tasks in an occupation. Essential skills are typically related to employability. These are skills that are prevalent across many occupations, and include both interpersonal attributes and learned skills (aka "soft skills"). Software skills are specific to any software tool or programming component used to support a job.

Top 10 Specialized Skills	Top 10 Essential Skills	Top 10 Software Skills
Inventory Management	Cleanliness	Microsoft PowerPoint
Cash Register	Scheduling	Productivity Software
Cash Handling	Training And Development	Geographic Information Systems

Exhibit 9 shows the minimum level of education requirements for related job postings in the Far North subregion.⁴

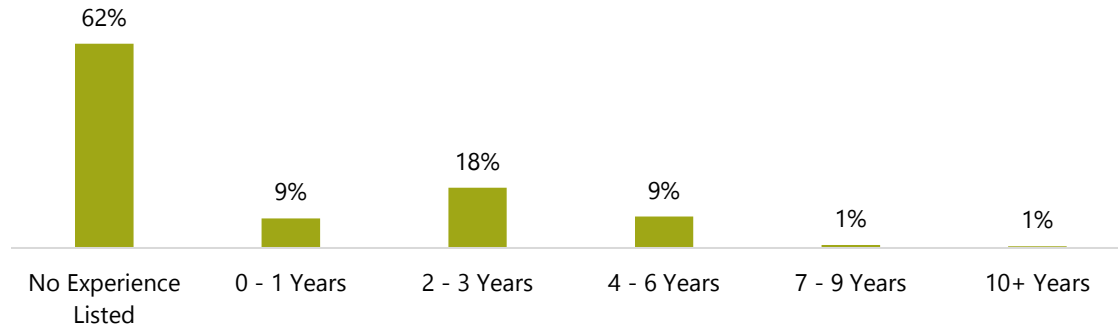
Exhibit 9. Employer-preferred job candidate education levels



⁴ Employers may include more than one level of education as a hiring requirement in a job posting. As a result, the values in exhibit 9 may sum to greater than 100%.

Exhibit 10 shows the experience levels required by employers for job postings for the selected occupations.⁵

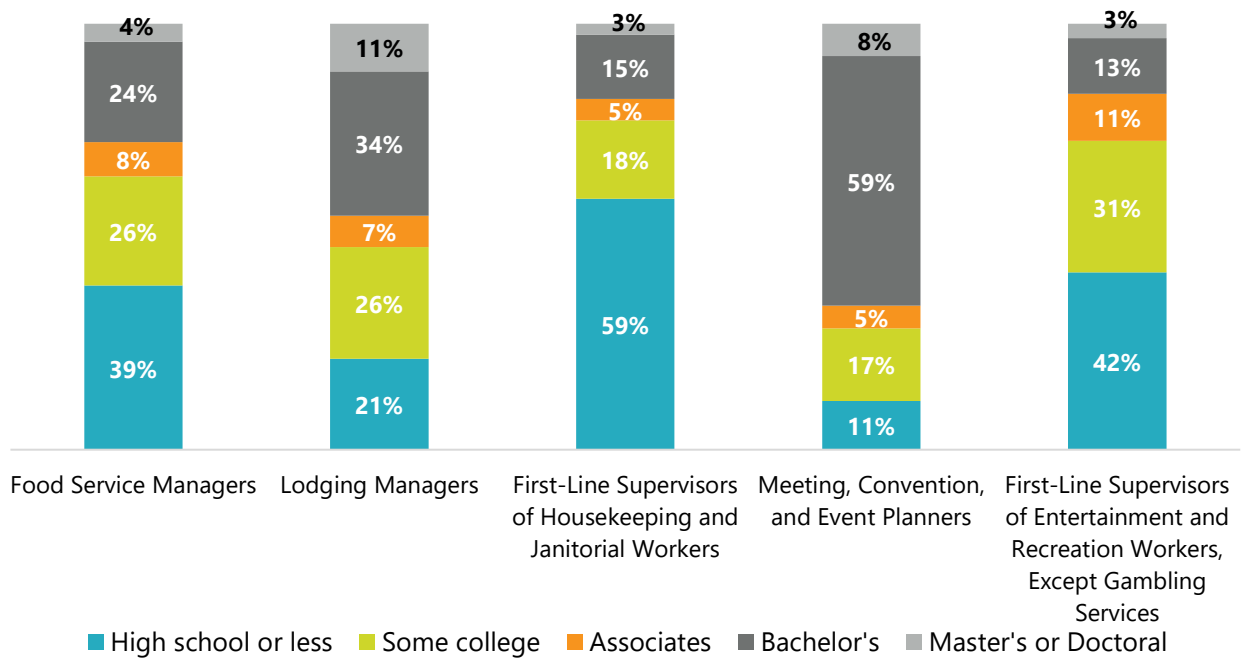
Exhibit 10. Employer-preferred job candidate experience levels



EDUCATION AND TRAINING

The U.S. Census Bureau collects data on the highest level of education achieved by workers employed across all occupations. Exhibit 11 shows California's educational attainment of the current workforce in the selected occupations.

Exhibit 11. California's educational attainment for selected occupations, 2019



⁵ Employers may include more than one level of experience as a hiring requirement in a job posting. As a result, the values in exhibit 10 may sum to greater than 100%.

The U.S. Bureau of Labor Statistics (BLS) uses a categorical system to assign typical entry-level education and job requirements to each occupation for which the BLS publishes projection data. These categories include entry-level education, work experience in a related occupation, and on-the-job training. Exhibit 12 shows the selected occupations' typical entry-level education and job requirements.

Exhibit 12. Typical entry-level education and job requirements

Occupation	Typical Entry-level Education	Work Experience Required	On-the-job Training Required
Meeting, Convention, and Event Planners	Bachelor's degree	None	None
Food Service Managers	High school diploma or equivalent	Less than 5 years	None
Lodging Managers	High school diploma or equivalent	Less than 5 years	None
First-Line Supervisors of Housekeeping and Janitorial Workers	High school diploma or equivalent	Less than 5 years	None
First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	High school diploma or equivalent	Less than 5 years	None

EDUCATIONAL SUPPLY

Educational supply for an occupation can be estimated by analyzing the number of awards issued in related Taxonomy of Programs (TOP) or Classification of Instructional Programs (CIP) codes. Exhibit 13 shows the TOP and CIP codes for educational programs related to the selected occupations.

Exhibit 13. TOP and CIP codes for training programs related to the selected occupations

TOP Programs and Codes	Aligned CIP Programs and Codes
Hospitality (1307.00)	Hospitality Administration/Management, General (52.0901) Meeting and Event Planning (52.0907)
Lodging Management (1307.20)	Hotel/Motel Administration/Management (52.0904)
Resort and Club Management (1307.30)	Resort Management (52.0906)
Restaurant and Food Services and Management (1307.10)	
Viticulture, Enology, and Wine Business (0104.00)	

Community College Supply

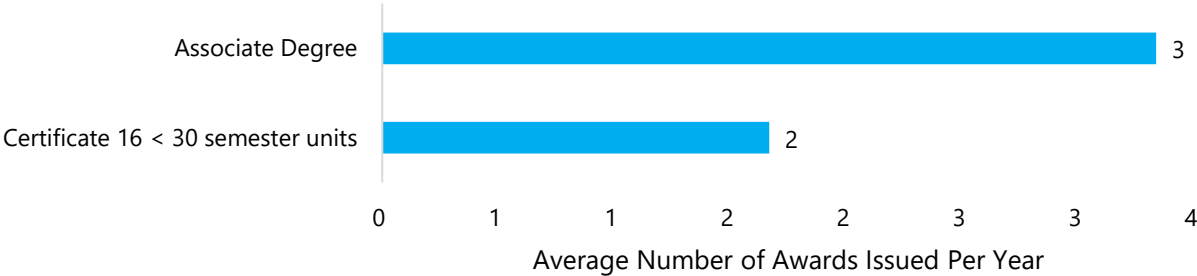
Exhibits 14 and 15 compare the average number of certificates and degrees from selected Far North community college programs over the last three academic years.

Exhibit 14. Annual average community college awards by program

Program - TOP Code	College	Annual Awards 2019-20	Annual Awards 2020-21	Annual Awards 2021-22	3-Yr Annual Awards Average
Hospitality (1307.00)	Shasta	3	3	4	3
	Subtotal	3	3	4	3

Program - TOP Code	College	Annual Awards 2019-20	Annual Awards 2020-21	Annual Awards 2021-22	3-Yr Annual Awards Average
Restaurant and Food Services and Management-(1307.10)	Mendocino	4	1	0	2
	Subtotal	4	1	0	2
	Grand Total	7	4	4	5

Exhibit 15. Annual average community college awards by type, 2019-20 through 2021-22



Other Postsecondary Supply

Non-community college training providers did not confer any awards in the Far North over the last three academic years. Please note that non-community college data lags by one year.

FINDINGS

- This report focuses on five occupations in the occupational pathway hospitality and tourism: food services managers, lodging managers, first-line supervisors of housekeeping and janitorial workers, and first-line supervisors of entertainment and recreation workers, except gambling services and meeting, convention, and event planners.
- The Far North subregion held 1,624 hospitality and tourism jobs in 2021. These jobs are projected to increase by 15% over the next five years, adding 237 new jobs to the subregion by 2026.
- Jobs for hospitality and tourism are projected to grow slower in the Far North subregion than in California.
- Over the next five years, hospitality and tourism jobs are projected to have 249 annual openings across the Far North.
- Wage data shows that hospitality and tourism occupations earn \$4 to \$8 above the single adult living wage of \$12.74 per hour. Median wages are between \$1 above and \$5 below the living wage for a small family (\$24.66 per hour).
- According to real-time labor market information, there were about 537 online job postings for hospitality and tourism between February 1, 2022, and January 31 2023. Job postings for food service managers made up 76% of the postings.
- Between 22% and 42% of incumbent workers in the studied occupations have educational attainment levels consistent with community college offerings (some college or associate degrees). Another 13% to 59% of workers in these occupations hold a bachelor's degree.
- Two Far North community colleges offer degrees and certificates in programs related to hospitality and tourism. Together, these programs conferred an average of five awards (certificates and associate degrees) in hospitality and tourism programs over the last three academic years (2019-20 through 2021-22).
- No non-community college postsecondary training providers in the subregion offer training related to the studied occupations. Please note that non-community college awards data lags by one year.

RECOMMENDATIONS

- Based on projected yearly openings and average annual awards in the Far North subregion, there seems to be an undersupply between educational supply and occupational demand.
 - Community colleges and other postsecondary training providers issued an average of five awards over the last three years.
 - There are 249 projected annual openings for hospitality and tourism jobs.
- The Far North Center of Excellence recommends moving forward with the program.

New Program Recommendation		
Move forward with the new program	Proceed with caution	A new program is not recommended
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

APPENDIX A. METHODOLOGY AND SOURCES

This report identified Occupations using the Center of Excellence TOP-to-CIP-to-SOC crosswalk and O*Net OnLine. This report's findings were determined using labor market data from the Bureau of Labor Statistics (BLS), U.S. Census Bureau data from Emsi, and jobs posting data from Burning Glass.

Lightcast (Formerly EMSI/Burning Glass) 2022.3; QCEW Employees, Non-QCEW Employees, and Self-Employed. <https://www.economicmodeling.com/>. *Note: EMSI occupational employment data are based on final EMSI industry data and final EMSI staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors).*

Integrated Postsecondary Education Data System (IPEDS). National Center for Education Statistics. U.S. Department of Education. <https://nces.ed.gov/ipeds/>.

Labor Market Information Division. California Employment Development Department. <https://labormarketinfo.edd.ca.gov/>.

Management Information Systems (MIS) Data Mart. California Community Colleges Chancellor's Office. <https://datamart.cccco.edu/>.

O*NET OnLine. U.S. Department of Labor/Employment and Training Administration (DOL ETA). <https://www.onetonline.org/>.

Public Use Microdata Sample (PUMS). U.S. Census Bureau American Community Survey (ACS). <https://www.census.gov/programs-surveys/acs/microdata.html>

Self-Sufficiency Standard Tool for California. The University of Washington. <http://www.selfsufficiencystandard.org/>

"Taxonomy of Programs." California Community Colleges Chancellor's Office. June 2012, 6th Edition. <https://www.cccco.edu/-/media/CCCCO-Website/About-Us/Divisions/Educational-Services-and-Support/Academic-Affairs/What-we-do/Curriculum-and-Instruction-Unit/Files/TOPmanual6200909corrected12513pdf.ashx>

"TOP-CIP-SOC Crosswalk." Centers of Excellence for Labor Market Research. June 2021 Edition. <http://coecc.net/>

COVID-19 Statement: This report includes employment projection data produced by Lightcast (formerly EMSI). Employment projections are developed using models based on historical data, which in this set of projections covers the period through 2021. Most input data, therefore, precedes the pandemic. Employment projections are long-term projections intended to capture structural changes in the economy, not cyclical fluctuations. As such, projections data are not intended to capture the impacts of the recession that began in February 2020. Cyclical fluctuations, like recessions, impact projects when they become part of the historical data set.

Important Disclaimer: 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. Efforts have been made to qualify and validate the accuracy of the data and the reported findings; however, neither the Centers of Excellence, COE host District, nor California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges or their representatives based upon components or recommendations contained in this study.

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Centers of Excellence for Labor Market Research, Economic and
Workforce Development Program



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