

RETAIL, HOSPITALITY, TOURISM & ENTERTAINMENT

OCCUPATIONAL DEMAND

Due to the many occupations that comprise the retail, hospitality, tourism, entertainment sector, the sector was broken into two components to more easily assess employment trends. The first component is hospitality and the second is retail. Within the hospitality segment, cooks (restaurant) is the largest occupation with over 3,400 jobs in 2018 and 539 annual openings (Exhibit 56). In the retail segment, the largest occupation is customer service representatives with 6,716 jobs in 2018 and 955 annual openings (Exhibit 57). Two hospitality occupations are projected to contract over the next five years—travel agents, and radio and television announcers. By comparison, in the retail segment, three occupations are expected to contract: fashion designers, floral designers, and advertising sales agents. In total, 2,080 annual openings are projected for hospitality workers, and 3,373 annual openings are projected for retail workers.

EXHIBIT 56. Hospitality employment and occupational projections, three-county area

OCCUPATION	2018 JOBS	2023 JOBS	5-YEAR CHANGE	5-YEAR % CHANGE	ANNUAL OPENINGS
Cooks, Restaurant	3,434	3,661	227	7%	539
First-Line Supervisors of Food Preparation and Serving Workers	3,219	3,518	299	9%	533
Cooks, Institution and Cafeteria	1,447	1,567	120	8%	234
Food Service Managers	1,359	1,388	29	2%	158
Bakers	697	714	17	2%	103
Butchers and Meat Cutters	650	683	33	5%	87
First-Line Supervisors of Housekeeping and Janitorial Workers	578	650	72	12%	82
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	659	679	20	3%	66
Chefs and Head Cooks	399	419	20	5%	55
Interpreters and Translators	388	424	36	9%	43
Audio and Video Equipment Technicians	299	316	17	6%	31
Photographers	335	346	11	3%	31
Meeting, Convention, and Event Planners	224	245	21	9%	31
Tour and Travel Guides	133	140	7	5%	25
Lodging Managers	181	193	12	7%	22
Broadcast Technicians	137	144	7	5%	14
Radio and Television Announcers	146	137	(9)	(6%)	14
Travel Agents	96	92	(4)	(4%)	11

EXHIBIT 57. Retail employment and occupational projections, three-county area

OCCUPATION	2018 JOBS	2023 JOBS	5-YEAR CHANGE	5-YEAR % CHANGE	ANNUAL OPENINGS
Customer Service Representatives	6,716	7,127	411	6%	955
First-Line Supervisors of Retail Sales Workers	5,659	5,777	118	2%	642
Sales Representatives, Services, All Other	2,690	2,962	272	10%	387
Hairdressers, Hairstylists, and Cosmetologists	2,526	2,733	207	8%	349
Insurance Sales Agents	2,769	2,901	132	5%	298
First-Line Supervisors of Personal Service Workers	1,040	1,197	157	15%	137
Real Estate Sales Agents	1,240	1,281	41	3%	122
Manicurists and Pedicurists	695	775	80	12%	97
Merchandise Displayers and Window Trimmers	606	619	13	2%	59
Demonstrators and Product Promoters	254	255	1	0%	44
Skincare Specialists	297	327	30	10%	41
Advertising Sales Agents	301	269	(32)	(11%)	36
Barbers	277	317	40	14%	35
Real Estate Brokers	350	362	12	3%	35
Funeral Attendants	190	197	7	4%	30
Floral Designers	276	272	(4)	(1%)	25
Security and Fire Alarm Systems Installers	192	208	16	8%	25
Interior Designers	208	212	4	2%	20
First-Line Supervisors of Gaming Workers	74	77	3	4%	12
Home Appliance Repairers	99	113	14	14%	12
Fashion Designers	114	113	(1)	(1%)	11

WAGES

In the hospitality segment, the highest paid occupation is interpreters and translators with an entry-level wage of \$19.59/hour and a median wage of \$23.19/hour (Exhibit 58). Three hospitality occupations fall below the SCV/SML subregion's living wage: first-line supervisors of food preparation and serving workers, restaurant cooks, and baker. In the retail sector, fashion designers earn the highest wages, \$29.06/hour entry level and \$37.30/hour median (Exhibit 59). The wages for funeral attendants, floral designers, barbers, and manicurists and pedicurists fall below the SCV/SML subregion's living wage.

EXHIBIT 58. Entry-level and experienced wages for hospitality occupations in the three-county subregion

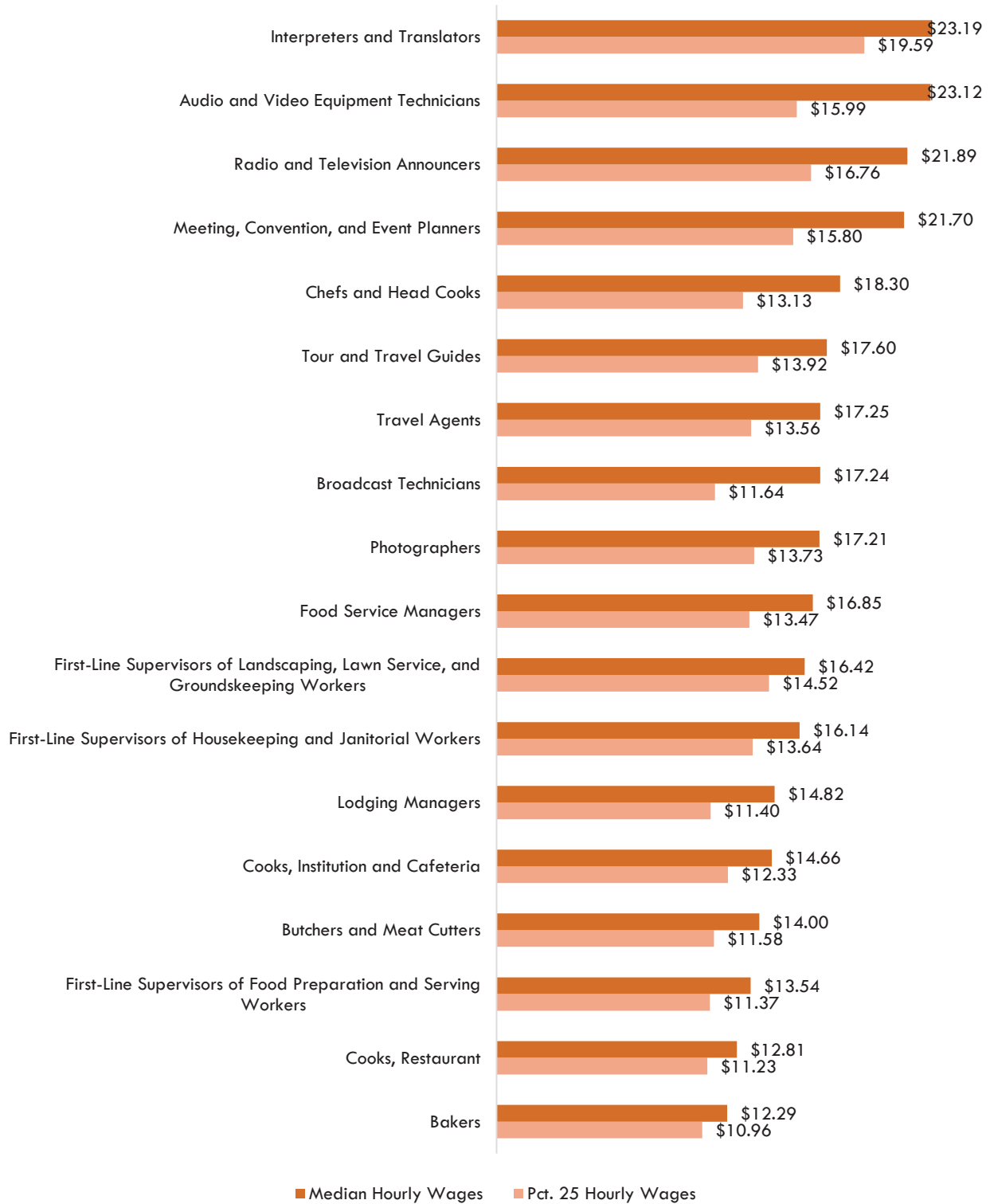
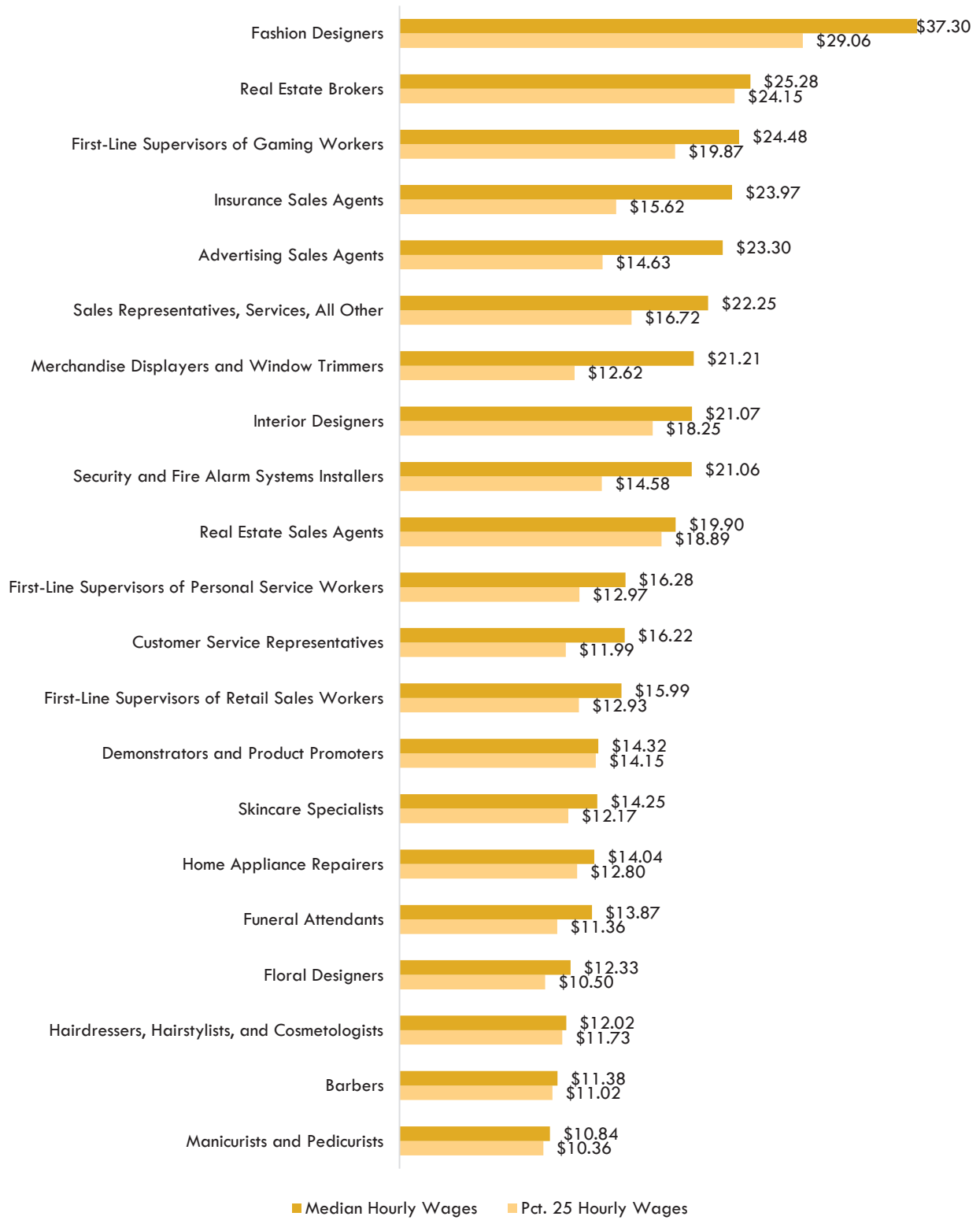


EXHIBIT 59. Entry-level and experienced wages for retail occupations in the three-county subregion



EDUCATIONAL ATTAINMENT & WORK EXPERIENCE

Most hospitality occupations require either a high school diploma or no formal education credential (Exhibit 60). One occupation typically requires an associate degree, broadcast technicians. Similarly, a high proportion of retail occupations require a high school diploma or no formal education credential (Exhibit 61). A bachelor's degree is typically required for fashion designers and interior designers, but about a third of the workforce has less than a bachelor's degree, making these middle-skill occupations.

EXHIBIT 60. Education, work experience, training and Current Population Survey results for hospitality occupations¹²

OCCUPATION	TYPICAL ENTRY-LEVEL EDUCATION	WORK EXPERIENCE REQUIRED	TYPICAL ON-THE-JOB TRAINING	CPS
Cooks, Restaurant	No formal educational credential	Less than 5 years	Moderate-term	23.4
First-Line Supervisors of Food Preparation and Serving Workers	HS diploma or equivalent	Less than 5 years	None	37.9
Cooks, Institution and Cafeteria	No formal educational credential	None	Short-term	23.4
Food Service Managers	HS diploma or equivalent	Less than 5 years	None	37.7
Bakers	No formal educational credential	None	Long-term	27.8
Butchers and Meat Cutters	No formal educational credential	None	Long-term	20.5
First-Line Supervisors of Housekeeping and Janitorial Workers	HS diploma or equivalent	Less than 5 years	None	35.2
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	HS diploma or equivalent	Less than 5 years	None	32.9
Chefs and Head Cooks	HS diploma or equivalent	5 years or more	None	39.4
Interpreters and Translators	Bachelor's degree	None	None	36.0
Audio and Video Equipment Technicians	Postsecondary nondegree award	None	Short-term	44.6
Photographers	HS diploma or equivalent	None	Long-term	33.0
Meeting, Convention, and Event Planners	Bachelor's degree	None	None	24.9
Tour and Travel Guides	HS diploma or equivalent	None	Moderate-term	36.9

¹² "Labor Force Statistics from the Current Population Survey," Bureau of Labor Statistics, <https://www.bls.gov/cps/>.

OCCUPATION	TYPICAL ENTRY-LEVEL EDUCATION	WORK EXPERIENCE REQUIRED	TYPICAL ON-THE-JOB TRAINING	CPS
Lodging Managers	HS diploma or equivalent	Less than 5 years	None	33.4
Broadcast Technicians	Associate degree	None	Short-term	44.6
Radio and Television Announcers	Bachelor's degree	None	None	42.0
Travel Agents	HS diploma or equivalent	None	Moderate-term	44.2

EXHIBIT 61. Education, work experience, training and Current Population Survey results for retail occupations¹³

OCCUPATION	TYPICAL ENTRY-LEVEL EDUCATION	WORK EXPERIENCE REQUIRED	TYPICAL ON-THE-JOB TRAINING	CPS
Customer Service Representatives	HS diploma or equivalent	None	Short-term	43.7
First-Line Supervisors of Retail Sales Workers	HS diploma or equivalent	Less than 5 years	None	38.1
Sales Representatives, Services, All Other	HS diploma or equivalent	None	Moderate-term	34.3
Hairdressers, Hairstylists, and Cosmetologists	Postsecondary nondegree award	None	None	41.6
Insurance Sales Agents	HS diploma or equivalent	None	Moderate-term	35.6
First-Line Supervisors of Personal Service Workers	HS diploma or equivalent	Less than 5 years	None	37.6
Real Estate Sales Agents	HS diploma or equivalent	None	Moderate-term	37.9
Manicurists and Pedicurists	Postsecondary nondegree award	None	None	30.2
Merchandise Displayers and Window Trimmers	HS diploma or equivalent	None	Short-term	30.3
Demonstrators and Product Promoters	No formal educational credential	None	Short-term	36.4
Skincare Specialists	Postsecondary nondegree award	None	None	30.2
Advertising Sales Agents	HS diploma or equivalent	None	Moderate-term	30.1

¹³ "Labor Force Statistics from the Current Population Survey," Bureau of Labor Statistics, <https://www.bls.gov/cps/>.

OCCUPATION	TYPICAL ENTRY-LEVEL EDUCATION	WORK EXPERIENCE REQUIRED	TYPICAL ON-THE-JOB TRAINING	CPS
Barbers	Postsecondary nondegree award	None	None	34.0
Real Estate Brokers	HS diploma or equivalent	Less than 5 years	None	37.9
Funeral Attendants	HS diploma or equivalent	None	Short-term	51.9
Floral Designers	HS diploma or equivalent	None	Moderate-term	30.3
Security and Fire Alarm Systems Installers	HS diploma or equivalent	None	Moderate-term	47.2
Interior Designers	Bachelor's degree	None	None	30.3
First-Line Supervisors of Gaming Workers	HS diploma or equivalent	Less than 5 years	None	45.4
Home Appliance Repairers	HS diploma or equivalent	None	Moderate-term	37.6
Fashion Designers	Bachelor's degree	None	None	30.3

SUPPLY

Analysis of California Community Colleges Chancellor's Office Data Mart program completion data shows that, on average, 130 awards related to hospitality and 41 awards related to retail were conferred in the three-county area each year (Exhibit 62 and Exhibit 63).

EXHIBIT 62. Postsecondary supply for hospitality occupations in the region

TOP TITLE-CODE	CERTIFICATES	DEGREES	SUBTOTAL
Recreation-083600		5	5
Sign Language Interpreting-085010	1		1
Commercial Music-100500	4	3	7
Technical Theater-100600		1	1
Dramatic Arts-100700		15	15
Dance-100800		5	5
Applied Photography-101200	18	4	22
Commercial Art-101300	1		1
Fashion Design-130310	3	3	6
Nutrition, Foods, and Culinary Arts-130600	0	2	2
Dietetic Services and Management-130620	2		2
Restaurant and Food Services and Management-130710	58	1	59
Lodging Management-130720	2		2
Resort and Club Management-130730		2	2
TOTAL	89	41	130

EXHIBIT 63. Postsecondary supply for retail occupations in the region

TOP TITLE-CODE	CERTIFICATES	DEGREES	SUBTOTAL
Retail Store Operations and Management-050650	28	2	30
Fashion Merchandising-130320	4	6	11
TOTAL	32	9	41

GAP ANALYSIS

An undersupply of 1,950 hospitality workers and 3,332 retail workers exists in the three-county area (Exhibit 64 and Exhibit 65).

EXHIBIT 64. Workforce annual demand and supply for hospitality in the three-county subregion

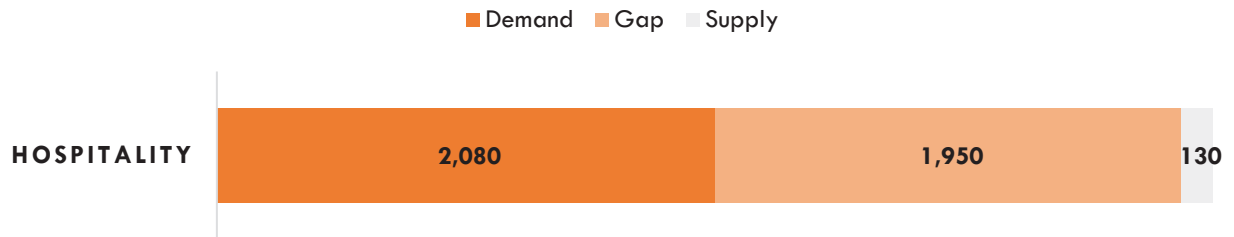
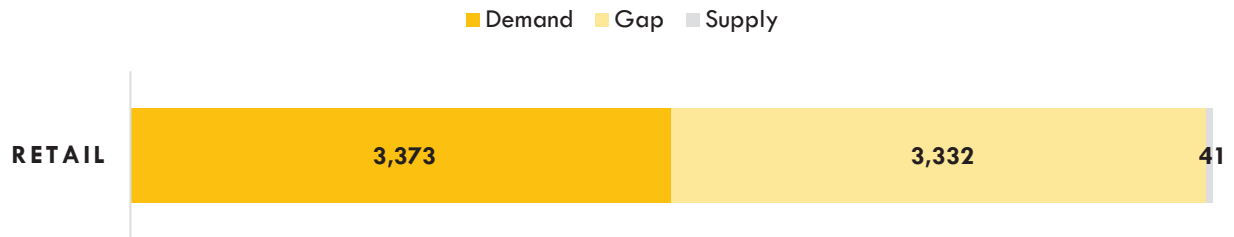


EXHIBIT 65. Workforce annual demand and supply for retail in the three-county subregion



CONCLUSION

This study examined labor market demand and postsecondary supply for the South-West Central Valley area, which is comprised of Tulare, Fresno, and Kings counties. Overall, 12 industry sectors were analyzed. Employment and five-year labor market projections for occupations in each industry were collected to shed light on where jobs are now and where they will be in the future. Wages were also analyzed to identify jobs that are in demand and that also pay solid wages. Postsecondary supply was compared with workforce demand to determine which industries could be facing a workforce shortage in the near future.

In the three-county area, industry sectors with the greatest workforce demand include:

- Business with nearly 7,500 annual openings
- Retail, hospitality, tourism and entertainment (RHTE) with nearly 5,500 annual openings
- Health care with more than 4,700 annual openings
- Energy, construction, and utilities with more than 3,600 annual openings
- Logistics with more than 2,800 annual openings

When workforce demand is compared with postsecondary supply, these five sectors also have the largest anticipated workforce shortages. The supply gaps for each of the five sectors total:

- 6,570 workers in business
- 5,282 workers in RHTE
- 3,739 workers in health care
- 3,482 workers in energy, construction, and utilities,
- 2,836 workers in logistics

It is imperative that community colleges in the three-county area assess whether current programs can be expanded to increase the number of students who are being prepared to enter these five sectors. Business, in particular, is a critical area of need and poses an opportunity for students to find employment in a field that is projected to expand substantially in coming years while offering many good paying jobs. Another noteworthy finding is that collectively, occupations within the global trade sector are projected to have 1,583 annual openings. However, no programs related to global trade currently have any community colleges completers in the three-county area. Programs targeting general and operations managers, and sales representatives (wholesale and manufacturing, except technical and scientific products) need to be promoted amongst students at colleges with existing programs. Adding new programs is also warranted should the community colleges decide to develop and offer a global trade program. These occupations will offer 664 and 488 annual openings, respectively, and pay wages that are substantially higher than many occupations in other sectors.

The community colleges may also choose to target occupations that are projected to have the greatest number of annual openings through 2023:

- Office clerks (general), 1,432 annual openings
- Heavy and tractor-trailer truck drivers, 1,202 annual openings
- Teacher assistants, 1,201 annual openings
- Secretaries and administrative assistants (except legal, medical, and executive), 961 annual openings
- Customer service representatives, 955 annual openings

Two other occupations worth mentioning are registered nurses, and farmers, ranchers, and other agricultural workers. These are two of the largest occupations in the three-county area. While their