**Culinary Arts and Hospitality Occupations**

**Labor Market Information Report**

**City College of San Francisco**

Prepared by the San Francisco Bay Center of Excellence

for Labor Market Research

May 2020

# Recommendation

Based on all available data, there appears to be a large undersupply of Culinary Arts and Hospitality workers compared to the demand for this cluster of occupations in the Bay region and in the Mid-Peninsula sub-region (San Francisco and San Mateo Counties). There is a projected annual gap of about 33,270 students in the Bay region and 9,768 students in the Mid-Peninsula Sub-Region.

This report also provides student outcomes data on employment and earnings for programs on TOP 1306.30 - Culinary Arts in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at colleges in the state and region, as well as to outcomes across all CTE programs at City College of San Francisco and in the region.

# Introduction

This report profiles Culinary Arts and Hospitality Occupations in the 12 county Bay region and in the Mid-Peninsula sub-region for a proposed new program at City College of San Francisco.

|  |
| --- |
| * **Cooks, Restaurant (SOC 35-2014):** Prepare, season, and cook dishes such as soups, meats, vegetables, or desserts in restaurants. May order supplies, keep records and accounts, price items on menu, or plan menu. |
| Entry-Level Educational Requirement: No formal *educational credential* |
| Training Requirement: Moderate-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 24% |
| * **Waiters and Waitresses (SOC 35-3031):** Take orders and serve food and beverages to patrons at tables in dining establishment. Excludes "Counter Attendants, Cafeteria, Food Concession, and Coffee Shop" (35-3022). |
| Entry-Level Educational Requirement: No *formal educational credential* |
| Training Requirement: Short-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 39*%* |
| * **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. |
| Entry-Level Educational Requirement: High *school diploma or equivalent* |
| Training Requirement: None |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 39*%* |
| * **Food Preparation and Serving Related Workers, All Other (SOC 35-9099):** All food preparation and serving related workers not listed separately. |
| Entry-Level Educational Requirement: No *formal educational credential* |
| Training Requirement: Short-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 25*%* |
| * **Food Preparation Workers (SOC 35-2021):** Perform a variety of food preparation duties other than cooking, such as preparing cold foods and shellfish, slicing meat, and brewing coffee or tea. |
| Entry-Level Educational Requirement: No *formal educational credential* |
| Training Requirement: Short-term *on-the-job training* |
| Percentage of Community College Award Holders or Some Postsecondary Coursework: 27*%* |

# Occupational Demand

**Table 1. Employment Outlook for Culinary Arts and Hospitality Occupations in Bay Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2019 Jobs | 2024 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Open-ings | Average Annual Open-ings | 25% Hourly Wage | Median Hourly Wage |
| Cooks, Restaurant | 47,081 | 52,827 | 5,747 | 12% | 40,792 | 8,158 | $13.18 | $15.35 |
| Waiters and Waitresses | 74,532 | 79,404 | 4,872 | 7% | 78,762 | 15,752 | $11.87 | $13.61 |
| First-Line Supervisors of Food Preparation and Serving Workers | 21,772 | 24,243 | 2,472 | 11% | 20,044 | 4,009 | $14.19 | $17.99 |
| Food Preparation and Serving Related Workers, All Other | 2,107 | 2,292 | 185 | 9% | 2,065 | 413 | $11.86 | $13.54 |
| Food Preparation Workers | 28,911 | 31,080 | 2,170 | 8% | 28,092 | 5,618 | $12.24 | $14.22 |
| **TOTAL** | **174,402** | **189,847** | **15,445** | **9%** | **169,756** | **33,951** | **$12.58** | **$14.73** |

*Source: EMSI 2020.1*

**Bay Region** includes Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties

**Table 2. Employment Outlook for Culinary Arts and Hospitality Occupations in Mid-Peninsula Sub-Region**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation | 2019 Jobs | 2024 Jobs | 5-Yr Change | 5-Yr % Change | 5-Yr Open-ings | Average Annual Open-ings | 25% Hourly Wage | Median Hourly Wage |
| Cooks, Restaurant | 14,559 | 16,248 | 1,689 | 12% | 12,496 | 2,499 | $14.53 | $16.94 |
| Waiters and Waitresses | 23,044 | 24,467 | 1,423 | 6% | 24,230 | 4,846 | $12.92 | $15.37 |
| First-Line Supervisors of Food Preparation and Serving Workers | 5,707 | 6,314 | 607 | 11% | 5,199 | 1,040 | $15.76 | $19.84 |
| Food Preparation and Serving Related Workers, All Other | 590 | 646 | 56 | 9% | 584 | 117 | $12.52 | $14.26 |
| Food Preparation Workers | 7,745 | 8,313 | 568 | 7% | 7,508 | 1,502 | $13.72 | $15.64 |
| **TOTAL** | **51,646** | **55,988** | **4,342** | **8%** | **50,017** | **10,003** | **$13.80** | **$16.34** |

*Source: EMSI 2020.1*

**Mid-Peninsula Sub-Region** includes San Francisco and San Mateo Counties

### Job Postings in Bay Region and Mid-Peninsula Sub-Region

**Table 3. Number of Job Postings by Occupation for latest 12 months (May 2019 - April 2020)**

| Occupation | Bay Region | Mid-Peninsula |
| --- | --- | --- |
| Waiters and Waitresses | 9,128 | 3,009 |
| First-Line Supervisors of Food Preparation and Serving Workers | 8,220 | 2,339 |
| Cooks, Restaurant | 6,775 | 2,199 |
| Food Preparation Workers | 2,586 | 699 |
| Food Preparation and Serving Related Workers, All Other | 2 | 1 |
| **TOTAL** | **26,711** | **8,247** |

*Source: Burning Glass*

**Table 4a. Top Job Titles for Culinary Arts and Hospitality Occupations for latest 12 months (May 2019 - April 2020) Bay Region**

|  |  |  |  |
| --- | --- | --- | --- |
| Common Title | Bay | Common Title | Bay |
| Cook | 3,515 | Kitchen Staff | 264 |
| Line Cook | 1,824 | Shift Supervisor | 250 |
| Server | 1,764 | Food Prep | 227 |
| Prep Cook | 1,000 | Associate Team Leader | 226 |
| Food Runner | 980 | Kitchen Crew Member | 204 |
| Store Supervisor | 976 | Servers | 199 |
| Wait Staff | 888 | Supervisor | 194 |
| Restaurant Server | 541 | Cocktail Server | 186 |
| Shift Leader | 536 | Team Leader | 175 |
| Shift Lead | 490 | Kitchen Supervisor | 171 |
| Banquet Server | 451 | Kitchen Assistant | 170 |
| Food Server | 426 | Busser | 169 |
| Dish Washer | 319 | Cashier | 160 |
| Restaurant Supervisor | 295 | Lead Cook | 148 |

**Table 4b. Top Job Titles for Culinary Arts and Hospitality Occupations for latest 12 months (May 2019 - April 2020) Mid-Peninsula Sub-Region**

|  |  |  |  |
| --- | --- | --- | --- |
| Common Title | Mid-Peninsula | Common Title | Mid-Peninsula |
| Cook | 1,174 | Cocktail Server | 79 |
| Line Cook | 593 | Lounge Server | 75 |
| Server | 521 | Dish Washer | 73 |
| Food Runner | 372 | Kitchen Staff | 68 |
| Prep Cook | 300 | Catering Captain | 63 |
| Wait Staff | 295 | Food Prep | 60 |
| Restaurant Server | 194 | Bartender | 60 |
| Store Supervisor | 188 | Supervisor | 58 |
| Shift Lead | 143 | Servers | 57 |
| Banquet Server | 117 | Barista | 53 |
| Food Server | 115 | Food Store Delivery | 51 |
| Restaurant Supervisor | 101 | Cashier | 50 |
| Shift Leader | 89 | Service Shopper | 48 |
| Kitchen Supervisor | 81 | Team Leader | 47 |

*Source: Burning Glass*

# Industry Concentration

**Table 5. Industries hiring Culinary Arts and Hospitality Workers in Bay Region**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Industry – 6 Digit NAICS (No. American Industry Classification) Codes | Jobs in Industry (2019) | Jobs in Industry (2022) | % Change (2019-24) | % Occupation Group in Industry (2019) |
| Full-Service Restaurants (722511) | 103,801 | 112,101 | 8% | 60% |
| Limited-Service Restaurants (722513) | 17,567 | 19,356 | 10% | 10% |
| Hotels (except Casino Hotels) and Motels (721110) | 8,674 | 9,070 | 5% | 5% |
| Snack and Nonalcoholic Beverage Bars (722515) | 6,442 | 7,771 | 21% | 4% |
| Supermarkets and Other Grocery (except Convenience) Stores (445110) | 6,372 | 6,708 | 5% | 4% |
| Food Service Contractors (722310) | 5,729 | 6,982 | 22% | 3% |
| Caterers (722320) | 3,378 | 3,714 | 10% | 2% |
| Drinking Places (Alcoholic Beverages) (722410) | 3,252 | 3,710 | 14% | 2% |

*Source: EMSI 2020.1*

**Table 6. Top Employers Posting Culinary Arts and Hospitality Occupations in Bay Region and Mid-Peninsula Sub-Region (May 2019 - April 2020)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employer | Bay | Employer | Bay | Employer | Mid-Peninsula |
| Marriott International Inc | 2,120 | Panera Bread | 123 | Marriott International Inc | 944 |
| Starbucks Coffee Co | 1,017 | Olive Garden | 122 | Starbucks Coffee Co | 196 |
| Whole Foods Market, Inc. | 562 | Instacart | 118 | Compass Group Plc US | 172 |
| H&R Block | 471 | Taco Bell | 114 | Caviar For Companies | 120 |
| Compass Group Plc United States | 392 | Sunrise Senior Living, Inc. | 108 | Compass Group | 115 |
| Compass Group | 332 | Interstate Hotels & Resorts | 103 | Hilton Hotel Corporation | 114 |
| Caviar For Companies | 298 | Compass Group Usa | 103 | Whole Foods Market, Inc. | 112 |
| Chili's | 270 | Benihana | 100 | H&R Block | 98 |
| Hilton Hotel Corporation | 233 | Applebee's Neighborhood Grill & Bar | 96 | Compass Corporation | 83 |
| Aramark | 215 | Bjs Restaurant Brewhouse | 94 | Guckenheimer | 73 |
| Hyatt | 212 | Habit Burger Grill | 88 | Ritz Carlton | 65 |
| Target | 207 | Compass Corporation | 83 | Sodexo | 61 |
| Guckenheimer | 161 | The Cheesecake Factory | 81 | Hyatt | 60 |
| Peet's Coffee | 150 | Amazon | 81 | Benihana | 57 |
| Red Lobster | 132 | Brookdale Senior Living | 80 | Mina Corporation | 52 |
| Panda Express | 131 | P.F. Chang's | 79 | Peet's Coffee | 45 |
| Sodexo | 126 | Chipotle Mexican Grill | 79 | Panda Express | 43 |

*Source: Burning Glass*

# Educational Supply

There are six (6) community colleges in the Bay Region issuing 308 awards on average annually (last 3 years ending 2018-19) on TOP 1306.30 - Culinary Arts. There is one college (CCSF) in the Mid-Peninsula Sub-Region issuing 63 awards on average annually (last 3 years) on this TOP code.

There are five (5) Other Educational Institutions in the Bay Region issuing 373 awards on average annually (last 3 years ending 2016-17) on TOP 1306.00 - Nutrition, Foods, and Culinary Arts. There are two (2) Other Educational Institutions in the Mid-Peninsula Sub-Region issuing 172 awards on average annually (last 3 years) on this TOP code.

**Table 7. Community College Awards on TOP 1306.30 - Culinary Arts in Bay Region**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| College | Sub-Region | Associates | Certificate 18+ Units | Certificate Low Unit | Total |
| Cabrillo | Santa Cruz-Monterey | 12 |  | 27 | 39 |
| Contra Costa | East Bay | 3 |  | 26 | 29 |
| Diablo Valley | East Bay | 7 |  | 34 | 41 |
| Laney | East Bay | 19 |  | 31 | 50 |
| San Francisco | Mid-Peninsula | 23 |  |  | 23 |
| San Francisco Ctrs | Mid-Peninsula |  | 40 |  | 40 |
| Santa Rosa | North Bay | 7 | 25 | 54 | 86 |
| **Total Bay Region** | | **71** | **65** | **172** | **308** |
| **Total Mid-Peninsula Sub-Region** | | **23** | **40** | **0** | **63** |

# Source: Data Mart

Note: The annual average for awards is 2016-17 to 2018-19.

**Table 7b. Other Educational Institution Awards on TOP 1306.00 - Nutrition, Foods, and Culinary Arts in Bay Region**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **College** | **Sub-Region** | **Award < 1 academic yr** | **Award 1 < 2 academic yrs** | **Award 2 < 4 academic yrs** | **Total** |
| Argosy University-The Art Institute of California-San Francisco | Mid-Peninsula | 30 |  | 4 | 34 |
| Argosy University-The Art Institute of California-Silicon Valley | Silicon Valley | 18 |  | 3 | 21 |
| CET-Sobrato | Silicon Valley |  | 24 |  | 24 |
| International Culinary Center-California | Silicon Valley |  | 122 |  | 122 |
| Le Cordon Bleu College of Culinary Arts-San Francisco | Mid-Peninsula | 88 |  | 84 | 172 |
| **Total Bay Region** | | **136** | **146** | **91** | **373** |
| **Total Mid-Peninsula Sub-Region** | | **88** | **0** | **84** | **172** |

# Source: Data Mart

Note: The annual average for awards is 2014-15 to 2016-17.

# Gap Analysis

Based on the data included in this report, there is a large labor market gap in the Bay region with 33,951 annual openings for the Culinary Arts and Hospitality occupational cluster and 681 annual (3-year average) awards for an annual undersupply of 33,270 students. In the Mid-Peninsula Sub-Region, there is also a gap with 10,003 annual openings and 235 annual (3-year average) awards for an annual undersupply of 9,768 students.

# Student Outcomes

**Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 1306.30 - Culinary Arts**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **2015-16** | **Bay  (All CTE Programs)** | **City College of San Francisco (All CTE Programs)** | **State (1306.30)** | **Bay (1306.30)** | **Mid-Peninsula (1306.30)** | **City College of San Francisco (1306.30)** |
| % Employed Four Quarters After Exit | 74% | 73% | 66% | 68% | 77% | 77% |
| Median Quarterly Earnings Two Quarters After Exit | $10,550 | $10,170 | $6.036 | $6,767 | $8,968 | $8,798 |
| Median % Change in Earnings | 46% | 50% | 78% | 91% | 63% | 79% |
| % of Students Earning a Living Wage | 63% | 55% | 38% | 41% | 42% | 45% |

*Source: Launchboard Pipeline (version available on 5/18/20)*

# Skills, Certifications and Education

**Table 9. Top Skills for Culinary Arts and Hospitality Occupations in Bay Region (May 2019 - April 2020)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Skill | Postings | Skill | Postings | Skill | Postings |
| Cooking | 5,940 | Customer Checkout | 1,299 | Product Knowledge | 595 |
| Customer Service | 5,339 | Guest Services | 1,168 | Budgeting | 560 |
| Cleaning | 4,662 | Store Operations | 1,147 | Product Sales | 552 |
| Food Preparation | 3,874 | Basic Mathematics | 1,085 | Record Keeping | 524 |
| Scheduling | 3,298 | Point of Sale System | 1,065 | Sales Goals | 517 |
| Cash Handling | 2,706 | Bartending | 1,019 | Tax Preparation | 500 |
| Retail Industry Knowledge | 2,660 | Merchandising | 1,005 | Meal Preparation | 481 |
| Food Safety | 2,466 | Cash Management | 999 | Quality Assurance and Control | 474 |
| Safety Training | 2,376 | Staff Management | 963 | Facebook | 465 |
| Restaurant Experience | 1,985 | Hazard Analysis Critical Control Point (HACCP) | 958 | Upselling Products and Services | 465 |
| Customer Contact | 1,689 | Food Delivery | 828 | Cost Control | 456 |
| Lifting Ability | 1,627 | Machinery | 741 | Restaurant Management | 429 |
| Sales | 1,466 | Meal Serving | 631 | Employee Coaching | 403 |
| Food Service Experience | 1,454 | Supervisory Skills | 618 | Cash Register Operation | 400 |
| Asset Protection | 1,299 | Repair | 609 | Order Correction | 392 |

*Source: Burning Glass*

**Table 10. Certifications for Culinary Arts and Hospitality Occupations in Bay Region (May 2019 - April 2020)**

Note: 80% of records have been excluded because they do not include a certification. As a result, the chart below may not be representative of the full sample.

|  |  |  |  |
| --- | --- | --- | --- |
| Certification | Postings | Certification | Postings |
| Food Handler Certification | 2,683 | Certified Dietary Manager | 29 |
| ServSafe | 1,484 | Security Clearance | 20 |
| Food Service Certification | 1,299 | Early Childhood Education Certification | 16 |
| Driver's License | 1,126 | Project Management Certification | 15 |
| Certified Barista | 240 | Certified Process Server | 15 |
| Training For Intervention Procedures (TIPS) Certification | 158 | Certified Health Education Specialist | 15 |
| Alcohol Awareness Certification | 101 | Forklift Operator Certification | 14 |
| First Aid CPR AED | 94 | Casino Gaming License | 13 |
| Leadership In Energy And Environmental Design (LEED) Certified | 79 | Pharmacy Technician Certification Board (PTCB) | 12 |
| Hazard Analysis and Critical Control Point (HACCP) Certification | 38 | Basic Life Saving (BLS) | 12 |
| Alcohol Server Certification | 37 | Food Safety Manager Certification | 11 |
| Cash Handling Certification | 32 | Registered Dietitian | 10 |

*Source: Burning Glass*

**Table 11. Education Requirements for Culinary Arts and Hospitality Occupations in Bay Region**

Note: 77% of records have been excluded because they do not include a degree level. As a result, the chart below may not be representative of the full sample.

|  |  |  |
| --- | --- | --- |
| Education (minimum advertised) | Latest 12 Mos. Postings | Percent 12 Mos. Postings |
| High school or vocational training | 5,170 | 86% |
| Associate Degree | 404 | 7% |
| Bachelor’s Degree or Higher | 401 | 7% |

*Source: Burning Glass*

# Methodology

Occupations for this report were identified by use of skills listed in O\*Net descriptions and job descriptions in Burning Glass. Labor demand data is sourced from Economic Modeling Specialists International (EMSI) occupation data and Burning Glass job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CTE Launchboard and CCCCO Data Mart.

# Sources

O\*Net Online

Labor Insight/Jobs (Burning Glass)

Economic Modeling Specialists International (EMSI)

CTE LaunchBoard [www.calpassplus.org/Launchboard/](http://www.calpassplus.org/Launchboard/)

Statewide CTE Outcomes Survey

Employment Development Department Unemployment Insurance Dataset

Living Insight Center for Community Economic Development

Chancellor’s Office MIS system

# Contacts

For more information, please contact:

* Doreen O’Donovan, Research Analyst, for Bay Area Community College Consortium (BACCC) and Centers of Excellence (CoE), [doreen@baccc.net](mailto:doreen@baccc.net) or (831) 479-6481
* John Carrese, Director, San Francisco Bay Center of Excellence for Labor Market Research, [jcarrese@ccsf.edu](mailto:jcarrese@ccsf.edu) or (415) 267-6544