

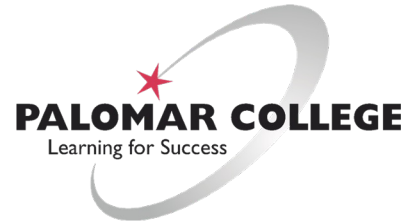
HOTEL INDUSTRY WORKFORCE NEEDS STUDY



POWERED BY



Center of Excellence (COE) San Diego & Imperial Counties Community Colleges



Agenda



Background and Purpose

High-Level Findings and Reflections

Q&A Discussion

Next Steps

Research Process

**Convene & Consult
Industry Advisory
Group**

**Develop Survey &
Distribution List**

**Collect Survey
Responses &
Analyze Data**

**Complete Report &
Provide
Recommendations**



Research Questions

Survey Target

Management:
HR, Managers,
Supervisors,
Directors, &
Executives

Employees

Research Questions

- What jobs do employers have difficulty filling?
- How are employers addressing labor shortages? What retention strategies have they implemented?
- What interventions can SDCLA, Burnham Center, and SDICCC develop to support industry's workforce needs?

- What workplace conditions support employee retention?
- What types of benefits are important to employees?
- What skills & abilities developed in the industry do employees find most valuable (e.g., transferable)?

Research Approach

Refined Occupation List

1. Cook
2. Groundskeeper
3. Food & Beverage Supervisor
4. Food Server/Banquet Helper
5. Hotel, Motel, & Resorts Desk Clerk
6. Housekeeping, Public Space, or Laundry Worker
7. Lodging & Operations Manager
8. Maintenance & Repair Worker
9. Sales & Catering Representative
10. Steward (e.g., Dishwashing)

Survey Instrument

Developed quantitative survey with consultation from advisory members

Two pathways:

- 1) **Management:** HR, Managers, Supervisors, Directors, & Executives
- 2) **Employees**

Data Collection

Phone surveys: Call center identified leads and conducted surveys over the phone

Web surveys: Advisory group members and regional partners distributed survey link to employees

Goal = 200 survey responses

Participant Profile

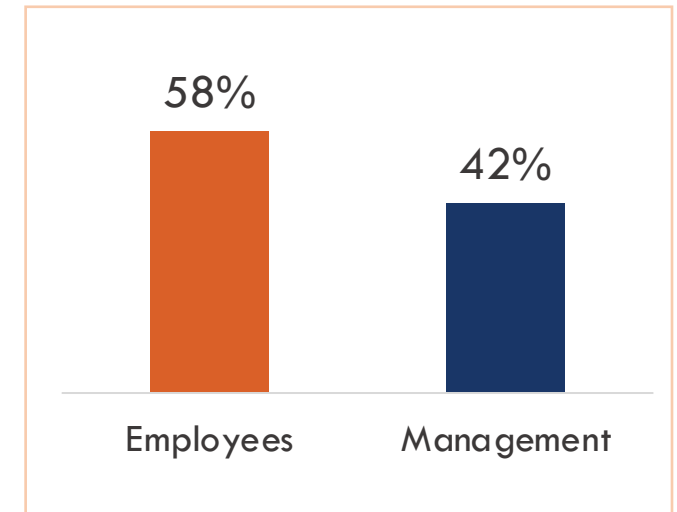
411 participants currently employed in the hotel industry participated in this study.

Gender	n=394
Female	53%
Male	36%
Prefer not to answer	10%

Age	n=392
18-24 years	8%
25-34 years	13%
35-44 years	13%
55 years or older	21%
Prefer not to answer	45%

Race/Ethnicity	n=392
White/Caucasian	29%
Hispanic/Latinx	18%
East/Southeast Asian	8%
Black/African American/South African	2%
American Indian/Alaska Native	1%
Native Hawaiian/Pacific Islander	1%
Other	2%
Prefer not to answer	44%

Employees and Management

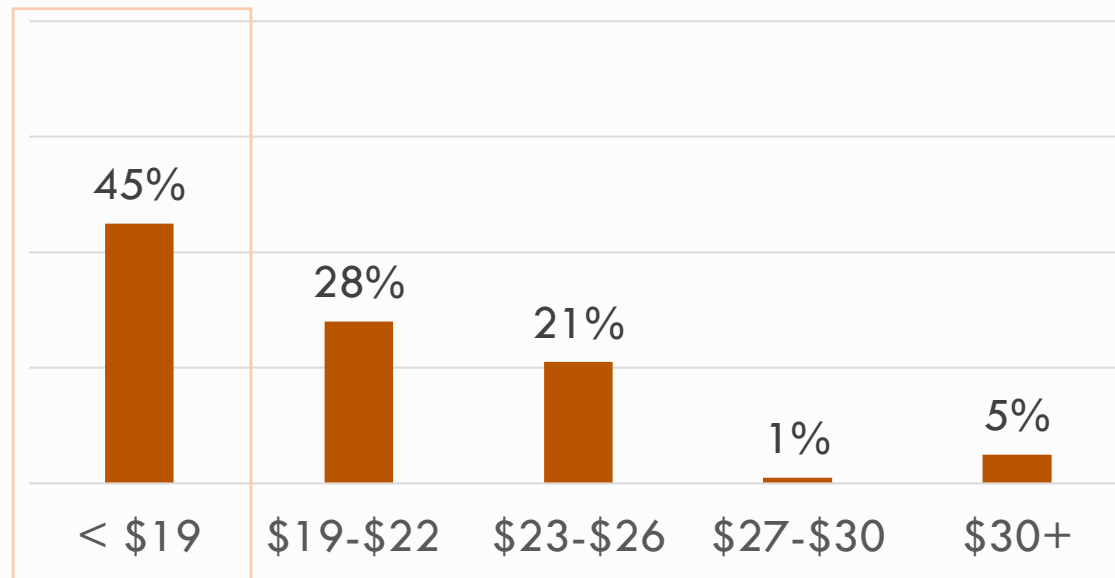


Participant Profile - Wages and Typical Hours Worked

Living wage for a single adult in San Diego County is **\$18.43 per hour**.

Nearly half of employees make less than the living wage (including tips).

Self-Reported Employee Wages (Including Tips)



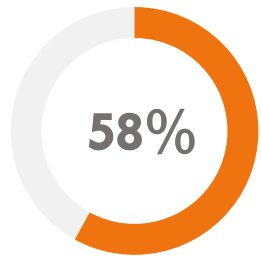
N=178, excluding 'prefer not to answer' responses (n=59)

Employee Hours Per Week	%
1 to 10 hrs	1%
11 to 29 hrs	10%
30 to 30 hrs	17%
40+ hrs	67%
Vary week to week	5%

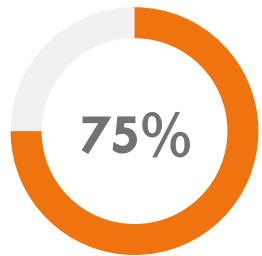
N=236

Key Differences Between Employees and Management

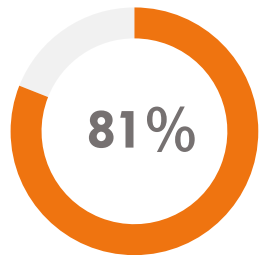
Employees



Reported being in their current position **less than 2 years***



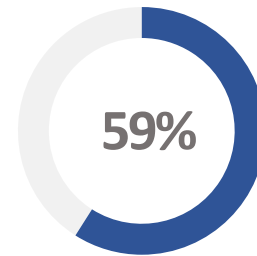
Have never changed jobs while in the industry (i.e., only employed at one job)*



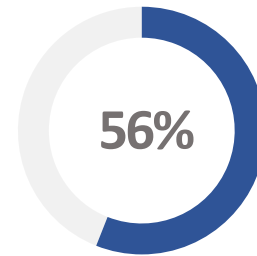
Have never been promoted, transferred, or employed at multiple companies*

n=296, *p< .05, significantly higher than management

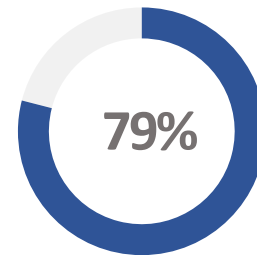
Management



Reported being in their current position **more than 10 years***



Have changed jobs at least once, and over one third more than 3 times



Have been promoted, transferred, or employed at multiple companies*

n=191, *p< .05, significantly higher than employees

Key Differences Between Employees and Management



Reflection

Take a moment to write down your responses:

- How do you interpret differences between employees and management?
- What information stands out to you?

Hiring and Positions (Management)

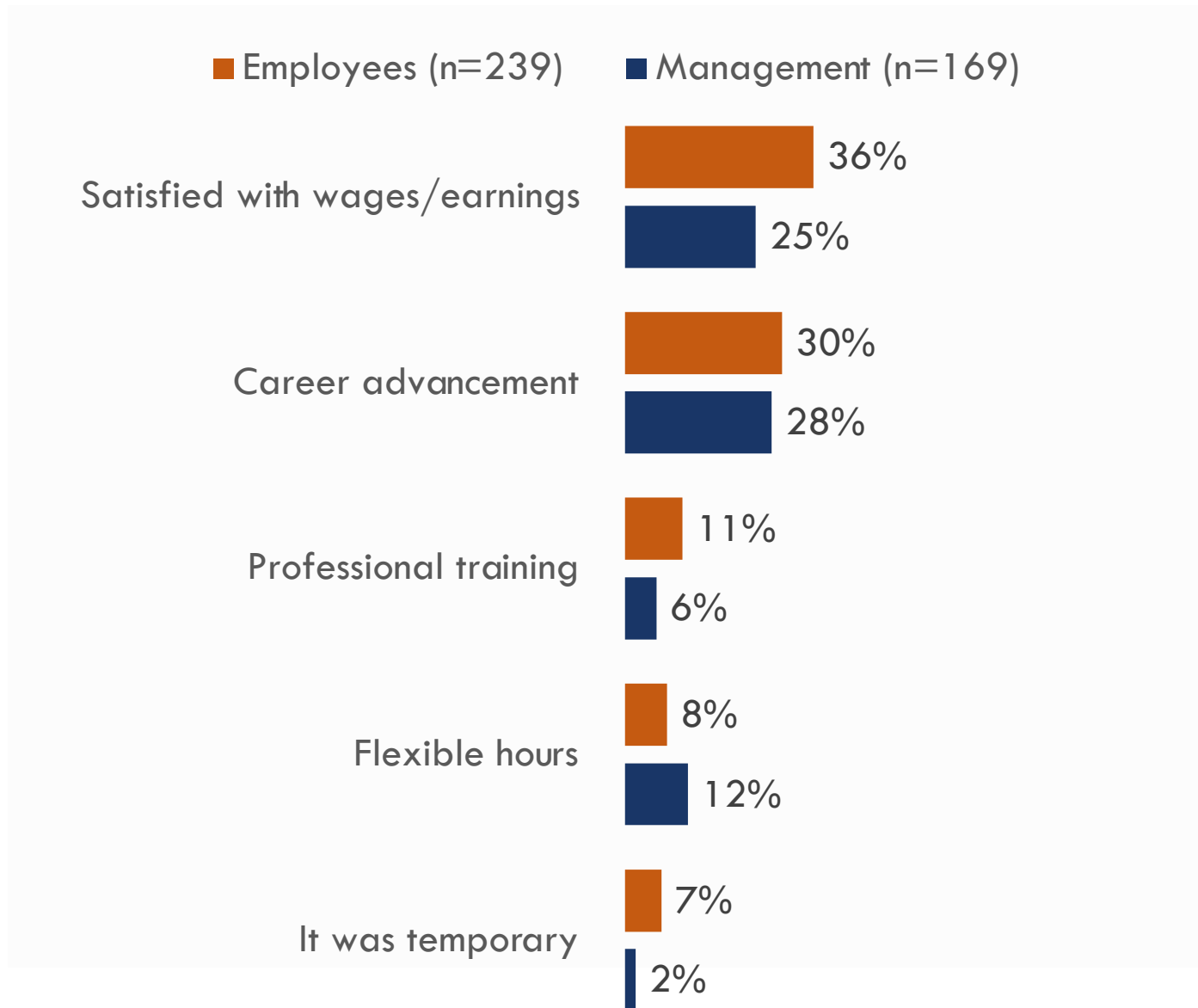
Difficult to Hire Positions (Last 12 Months)

Job Title	Ranking (Most Difficult to Least Difficult)
Housekeeping, Public Space, & Laundry Worker	1
Cook	2
Maintenance and Repair Worker	3
Steward (e.g., Dishwashing)	4
Hotel, Motel, and Resorts Desk Clerk	5
Food and Beverage Supervisor	6
Food Server or Banquet Helper	7
Lodging and Operations Manager	8
Groundskeeper	9
Sales and Catering Representative	10

Based on the positions you selected, how many employees does your company expect to hire in the next 12 months?



What is the primary reason you decided to work in the industry?



Top primary reason for employees
is **satisfied with
wages/earnings**

Top primary reason for
management is
career advancement

Wages for Difficult-to-Hire Positions (Management)

	Job Title	Less than \$19	\$19-\$22	\$23-\$26	+\$27	n
1	Housekeeping, Public Space, or Laundry Worker	54%	41%	4%	1%	69
2	Cook	19%	55%	21%	5%	42
3	Maintenance and Repair Worker	31%	44%	22%	3%	32
4	Steward (e.g., Dishwashing)	32%	65%	3%	0%	31
5	Hotel, Motel, and Resorts Desk Clerk	50%	43%	7%	0%	30
6	Food and Beverage Supervisor	13%	13%	58%	17%	24*
7	Food Server/Banquet Helper	55%	30%	10%	5%	20*
8	Lodging and Operations Manager	25%	17%	33%	25%	12*
9	Groundskeeper	67%	33%	0%	0%	12*
10	Sales and Catering Representative	25%	25%	17%	33%	12*

*Interpret with caution due to small sample size

Wages for Difficult-to-Hire Positions (Management)

	Job Title	Less than \$19	\$19-\$22	\$23-\$26	+\$27	n
1	Housekeeping, Public Space, or Laundry Worker	54%				69
2	Cook		55%			42
3	Maintenance and Repair Worker		44%			32
4	Steward (e.g., Dishwashing)		65%			31
5	Hotel, Motel, and Resorts Desk Clerk	50%				30
6	Food and Beverage Supervisor			58%		24*
7	Food Server/Banquet Helper	55%				20*
8	Lodging and Operations Manager			33%		12*
9	Groundskeeper	67%				12*
10	Sales and Catering Representative				33%	12*

*Interpret with caution due to small sample size

Are these wages consistent with what we've seen?

	Job Title	Entry-Level Wages (LMI)	Advertised Wages (Job Postings)	Manager-Reported Wages	Employee-Reported Wages
1	Housekeeping, Public Space, or Laundry Worker	\$15	\$17	< \$19	< \$19
2	Cook	\$17	\$18	\$19-\$22	\$19-\$22*
3	Maintenance and Repair Worker	\$18	\$21	\$19-\$22	\$19-\$22*
4	Steward (e.g., Dishwashing)	\$15	\$16	\$19-\$22	< \$19*
5	Hotel, Motel, and Resorts Desk Clerk	\$15	\$16	< \$19	< \$19
6	Food and Beverage Supervisor	\$17	\$18	\$23-\$26*	\$19-\$22*
7	Food Server/Banquet Helper	\$15	\$16	< \$19*	< \$19
8	Lodging and Operations Manager	\$25	\$26	\$23-\$26*	\$23-\$26*
9	Groundskeeper	\$16	\$18	< \$19*	< \$19*
10	Sales and Catering Representative	\$23	\$22	\$27+*	<\$19

*Interpret with caution due to small sample size

Note: Wages are rounded

Sort of. These wages are higher than what we're used to seeing.

	Job Title	Entry-Level Wages (LMI)	Advertised Wages (Job Postings)	Manager-Reported Wages	Employee-Reported Wages
2	Cook			\$19-\$22	\$19-\$22*
3	Maintenance and Repair Worker			\$19-\$22	\$19-\$22*
4	Steward (e.g., Dishwashing)			\$19-\$22	
6	Food and Beverage Supervisor			\$23-\$26*	\$19-\$22*
10	Sales and Catering Representative			\$27+*	

*Interpret with caution due to small sample size

Note: Wages are rounded

Wages



Reflection

- Have you seen an increase in wages in the hotel industry?
- Have you seen other evidence that supports (or conflicts with) these findings?

Recent Reports and Articles



SAN DIEGO NORTH
Economic Development Council

The San Diego Union-Tribune



U.S. BUREAU OF LABOR STATISTICS

SD County wages are up; Jobs with most wage gains

“The leisure and hospitality sector experienced the largest wage growth at 13.9 percent”



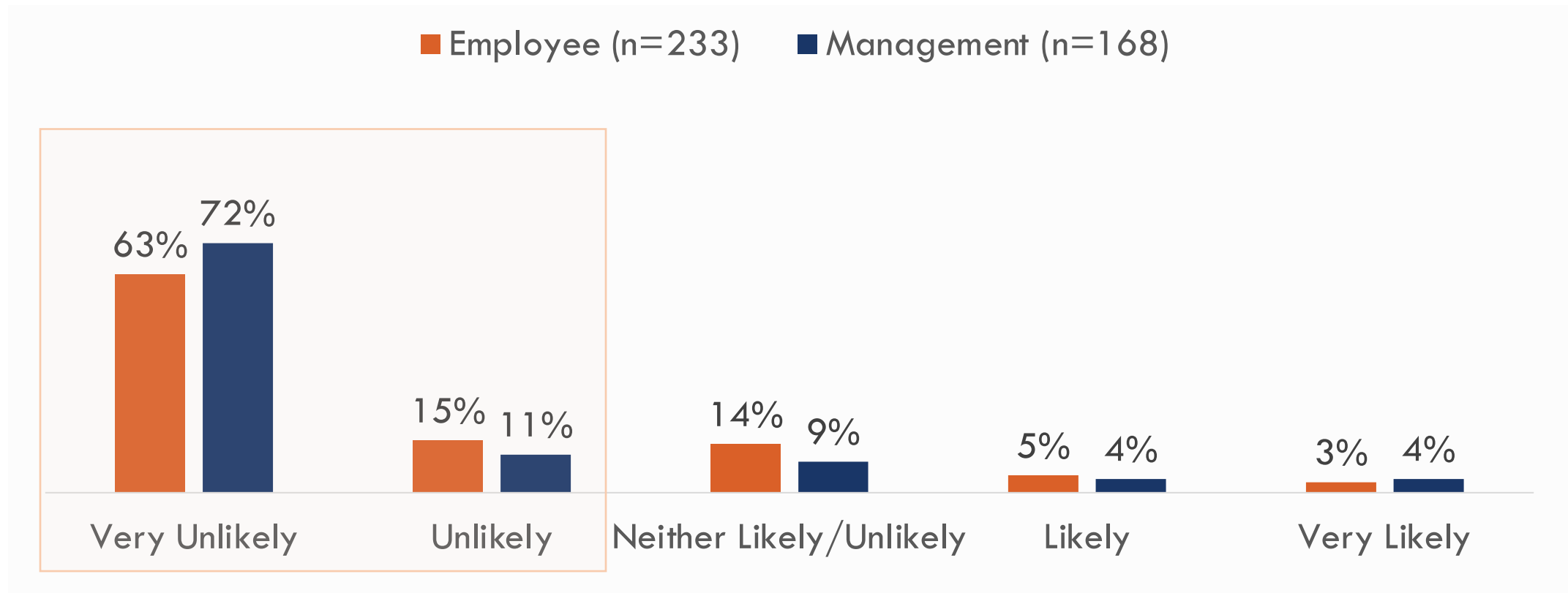
TOURISM AUTHORITY



NINE IN 10 TOURISM WORKERS HAPPY WITH WAGES WOULD REMAIN IN TOURISM INDUSTRY

According to our survey of more than 500 tourism workers, 89% of respondents said they were either satisfied or completely satisfied with their earnings.

How likely are you to leave the industry in the next 12 months?



Overall, most employees and managers plan to stay in the industry over the next 12 months. This suggests that short-term retention is high.

How important is each of the following in your decision to stay?

Top Benefits for Employees/Management	% Fairly Important/Very Important	
	Employee (n=234)	Management (n=167)
Comprehensive benefits (e.g., medical, dental, vision)	44%	70%*
Retirement benefits	36%	67%*
Career advancement/growth	35%	63%*
Professional development or training	34%	60%*
Set schedule (e.g., only morning shift)	33%	52%*

* $p < .05$ management were significantly more likely to select 'fairly important' and 'very important' than employees

What benefits does your company offer? (Management)

Benefit	Both FT/PT	Full-Time Only	Not Offered
4 Professional development or training	39%	42%	19%
Advanced scheduling (e.g., 2 weeks or more)	34%	33%	33%
5 Set schedule (e.g., mornings only)	33%	35%	32%
2 Retirement benefits (e.g., employer-sponsored)	28%	53%	19%
1 Comprehensive benefits (e.g., medical, dental, vision)	23%	64%	14%
Transportation stipend	21%	28%	52%
Work from home/flexible work arrangement	19%	38%	44%
Tuition reimbursement	15%	37%	48%
Accessible childcare/childcare facility	14%	29%	58%

While comprehensive benefits are important to both employees (44%) and management (70%) retention, they are only offered to full-time employees

Benefits



Reflection

- Do findings about likelihood to stay and desired benefits match what you've seen in industry?
- What's surprising? What's not surprising?

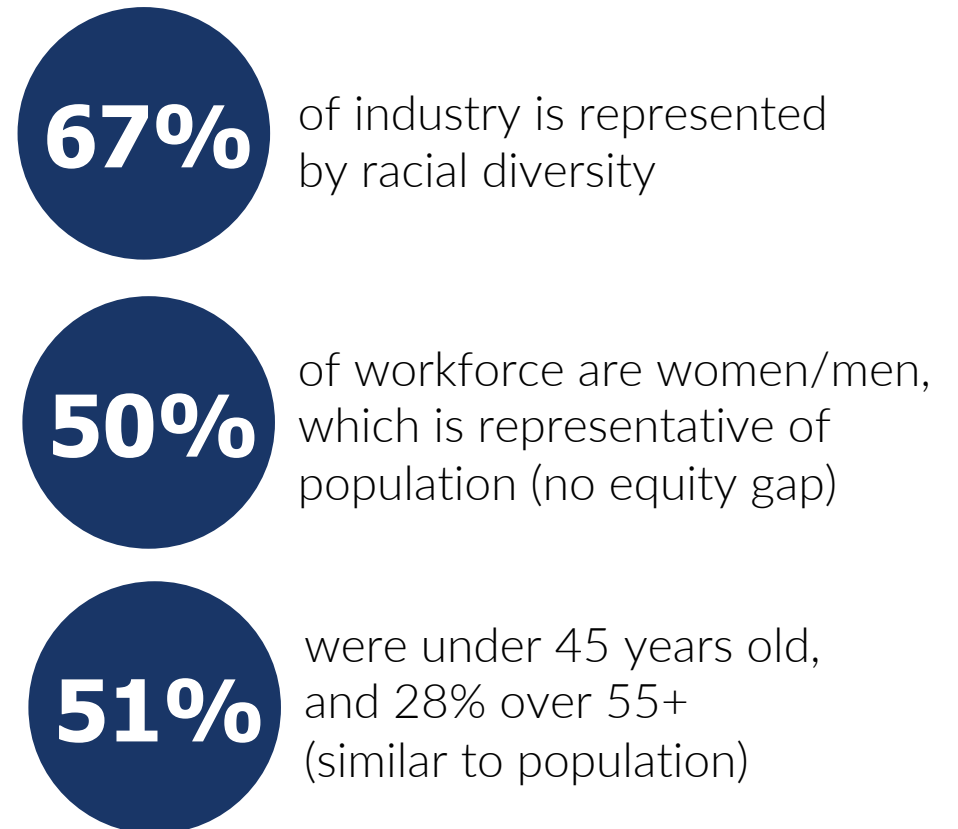
What stands out about working in the industry?

Please rate how much you agree or disagree with the following statements regarding your most recent work experience in the hotel industry.

Statements	% Agree/Strongly Agree	
	Employee (n=234)	Management (n=167)
The industry values diversity, equity, and inclusion*	82%	86%
I would recommend working in the industry to friends and family*	77%	84%
My work is meaningful, significant, and rewarding*	76%	83%

*p<.05 management were significantly more likely agree with each statement than employees

Labor Market Information (NAICS 721 Accommodations)



What continuing education or PD would you be interested in?

Employees (Ranked)

(1) Management & Leadership Training

(2) Business/Entrepreneurship Training

(3) Sales and Business Development

(4) Marketing/Social Media

(5) Accounting/Finance

n=227

Management (Ranked)

(1) Management & Leadership Training

(2) Business/Entrepreneurship Training

(3) IT/IT Technology

(4) Sales and Business Development

(5) Marketing/Social Media

n=165

What are the most valuable skills you learned in the hotel industry?

**3
Skills**



Employees selected an average of 3 skills

Employees (Ranked)

- (1) **Customer Service**
- (2) **Multi-tasking**
- (3) **Time Management**
- (4) **Organizational Skills**
- (5) **Leadership**

n=227

**5
Skills**



Management selected an average of 5 skills

Management (Ranked)

- (1) **Leadership***
- (2) **Multi-tasking***
- (3) **Customer Service**
- (4) **Organizational Skills***
- (5) **Time Management***

n=165

* $p < .05$ management were significantly more likely to select skill than employees

Transferable Skills



Reflection

How can our region's education and workforce development system support the training and development of these skills?

Q&A and Discussion



Reflection

- How do you interpret differences between employees and management?
- Have you seen an increase in wages in the hotel industry?
- Do findings about likelihood to stay and desired benefits match what you've seen in industry?
- How can our region's education and workforce development system support the training and development of these skills?

THANK YOU!
QUESTIONS?

