SAN DIEGO COUNTY LABOR MARKET ANALYSIS

TOURISM

Employment Trends and Career Opportunities

NOVEMBER 2017
The Tourism Sector is a critical economic driver in San Diego County. It plays a valuable role in improving the region’s quality of life, bringing in external revenue and introducing young adults to the world of work. This study works to inform the workforce development system of the employment pathways and career advancement opportunities that come from employment in this sector. The full report analyzes data on job growth, training opportunities, hiring challenges and in-demand skills from firms in the Tourism Sector. Visit workforce.org/reports to read the full report.

OVERVIEW OF TOURISM SECTOR IN SAN DIEGO COUNTY

The Tourism Sector accounts for nearly ten percent of jobs in the region, employing approximately 191,000 workers across seven key subsectors:

<table>
<thead>
<tr>
<th>Subsector</th>
<th>2011</th>
<th>2016</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and Beverage Services</td>
<td>103,029</td>
<td>128,174</td>
<td>140,451</td>
</tr>
<tr>
<td>Accommodations and Lodging</td>
<td>26,837</td>
<td>30,704</td>
<td>32,850</td>
</tr>
<tr>
<td>Recreation and Entertainment</td>
<td>13,870</td>
<td>16,657</td>
<td>18,170</td>
</tr>
<tr>
<td>Attractions</td>
<td>7,930</td>
<td>9,487</td>
<td>10,366</td>
</tr>
<tr>
<td>Visitor and Travel Services</td>
<td>4,173</td>
<td>4,894</td>
<td>4,823</td>
</tr>
<tr>
<td>Transportation</td>
<td>1,251</td>
<td>1,251</td>
<td>1,251</td>
</tr>
<tr>
<td>Events and Conferences</td>
<td>600</td>
<td>726</td>
<td>750</td>
</tr>
</tbody>
</table>

22% more jobs in 2016 than in 2011

CROSS-INDUSTRY PATHWAYS

The Tourism Sector develops a versatile and transferrable skillset that can help a job seeker move into a number of pathways, either within the sector or into others. The three industries below require similar problem-solving, communication and customer service skills, making them good options for people with tourism experience:

- Finance, Insurance & Real Estate
- Retail
- Professional and Business Services

JOB SEEKER TIPS

- Don’t underestimate the valuable skills you have developed in your career that can help you transition to or from the Tourism Sector.
- Use posted job descriptions as guides for the skills you should emphasize on your resume, and make it unique for every application.
- For example, someone with two years of experience as a desk clerk at a hotel would bring valuable customer service and communication skills to an office assistant position in Finance, Insurance, Real Estate or a number of other industries. Software used on the job can also make a job seeker more competitive.
- Always remember that your career is a long journey. It is common to hear of top tourism executives who started their career in entry-level tourism jobs.

EMPLOYER-DESIRED KNOWLEDGE, SKILLS AND ABILITIES

- Communication skills (both written and spoken)
- Computer skills (software applications)
- Customer Service
- Sales and Marketing
- Basic mathematics
- Product knowledge
RECOMMENDATIONS FOR WORKFORCE DEVELOPMENT

- Cross-train managers in different departments to develop a comprehensive understanding of daily challenges faced at different divisions within the organizations.
- Those entering the workforce for the first time should apply for entry-level positions and internships to see if Tourism is a good career fit. At the very least, entry-level employment in this sector develops workplace and customer service skills that are valuable in almost any career pathway.
- Help workers with previous work experience to explore employment opportunities in Tourism. Their experience could be applicable in accounting, finance, management, clerical positions, customer service and more.
- Education programs, Tourism boards, and employers should educate job seekers about the career pathway opportunities that exist within an organization in hospitality and the unique opportunities job seekers have to move up in seniority and across departments within the same company.

TOP TOURISM SECTOR OCCUPATIONS IN SAN DIEGO COUNTY, 2016

<table>
<thead>
<tr>
<th>TIER</th>
<th>TYPICAL EDUCATION</th>
<th>TYPICAL WORK EXPERIENCE</th>
<th>TYPICAL ON-THE-JOB TRAINING</th>
<th>MEDIAN WAGE</th>
<th>NUMBER OF JOBS</th>
<th>EXAMPLES OF OCCUPATIONS</th>
</tr>
</thead>
</table>
| 1    | Bachelors Degree or above | 3-5 years | Long term OJT | $37.94 | 7,044 | • Meeting, Convention, and Event Planners ($21.92)  
• Market Research Analysts ($31.25)  
• General and Operations Managers ($50.27) |
| 2    | High School Degree or Equivalent | 0-2 years | Short to Moderate OJT | $21.18 | 20,379 | • Maintenance and Repair Workers, General ($18.51)  
• Food Service Managers ($22.23)  
• First-line Supervisors of Office and Administrative Support Workers ($25.91) |
| 3    | No formal credential or degree | None | None to Short OJT | $13.85 | 163,919 | • Landscaping and Groundskeeping Workers ($12.45)  
• Lifeguards, Ski Patrol, and other Recreational Protective Service Workers ($15.09)  
• Chefs and Head Cooks ($19.97) |

FREQUENCY OF NON-ENTRY LEVEL POSITIONS PROMOTED FROM WITHIN ORGANIZATION

In the Tourism Sector, non-entry level positions are frequently promoted from within. Finding success working in different occupations such as customer service, office and administrative positions, or in food preparation can lead to promotion to titles such as team lead, manager or supervisor.

Nearly half of the participants surveyed indicated their organization frequently promotes from within, with an additional 40 percent indicating they promote from within 70 or more percent of the time.

<table>
<thead>
<tr>
<th>Frequency of Promotion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequently (31-69% of the time)</td>
<td>45%</td>
</tr>
<tr>
<td>Usually (70% or more of the time)</td>
<td>40%</td>
</tr>
<tr>
<td>Seldom (1-30% of the time)</td>
<td>13%</td>
</tr>
<tr>
<td>Never</td>
<td>2%</td>
</tr>
</tbody>
</table>

CROSS-INDUSTRY OCCUPATIONS

- Sales Representatives, Services, All Other ($23.94*)
- Food Service Managers ($22.23)
- Customer Service Representatives ($17.52)
- Maintenance and Repair Workers, General ($18.51)

While excellent starting points in tourism, these job titles are also found elsewhere—job seekers can make lateral career moves to find the right career fit.

- Each requires a high school diploma, combined with on-the-job training/experience

* Represents median wage
TABLE OF CONTENTS

INTRODUCTION ........................................................................................................... 2

SECTOR OVERVIEW .................................................................................................... 3
  Tourism in the Metro Region ...................................................................................... 7
  Tourism in the North Region ..................................................................................... 8
  Tourism in the South Region .................................................................................... 9
  Tourism in the East Region ...................................................................................... 9

OCCUPATIONAL OVERVIEW .................................................................................. 11
  Career Ladders and Lattices .................................................................................... 13

TRAINING, EDUCATION AND SKILLS FOR TOURISM ...................................... 18
  Employer Satisfaction with Education and Training Resources .............................. 20

CONCLUSION AND RECOMMENDATIONS ................................................................. 23

APPENDIX A: METHODOLOGY .................................................................................. 25

APPENDIX B: EMPLOYER SURVEY TOPLINES ......................................................... 27
INTRODUCTION

The tourism sector is a critical economic driver in San Diego County, with considerable impact on local jobs and regional tax revenues. It also plays a valuable role in improving the region’s quality of life, generating revenue from outside the region, developing essential skills among the region’s workforce, and introducing young adults to the world of work.

Given the seasonal nature of tourism, the sector’s employment expands and contracts depending on the time of year. Tourism firms will generally start hiring at the beginning of the year, increasing its workforce until reaching a peak at the end of summer. From summer to the end of the year, the sector contracts and decreases in jobs until the beginning of the next year. On average this sector employs approximately 191,892 workers, and has grown by roughly 20 percent over the past decade. In 2016 alone, it generated almost $18 billion in sales revenue for the region. The tourism sector serves local, national and international customers, generating a positive economic impact on other related industries such as retail and personnel services.

To better understand the region’s employer needs, the San Diego Workforce Partnership (SDWP) commissioned BW Research, Inc. to conduct a labor market analysis on the tourism sector. The goal of this report is to document the barriers to employment and opportunities for career pathways within the tourism sector. The tourism sector can be defined by seven industries: 1) Attractions, 2) Accommodations and Lodging, 3) Food and Beverage Services, 4) Recreation and Entertainment, 5) Transportation, 6) Visitor and Travel Services and 7) Events and Conferences. A total of 203 employers responded to surveys and 20 in-depth executive interviews were conducted with employers, educators and employees. This study also provides recommendations for developing and expanding training and employment programs to support career advancement in tourism and related occupational pathways.

SDWP and BW Research would like to acknowledge and thank Brian Blake from San Diego State University’s Hospitality Program, Karen Smith from MiraCosta College’s Hospitality Program, Mary Burton from Sea World, and Althea Salas, Margie Sitton and Joe Terzi from the San Diego County Tourism Authority for their invaluable input and insight into this research.

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1 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker. Total sales revenue includes revenue generated from both local and visitor sales.
SECTOR OVERVIEW

San Diego County had 6.4 percent more tourism jobs in 2016 than in 2006. Even after dipping during the 2007–2009 recession, the economy recovered and regained a steady growth trajectory. Employment in the tourism sector both fell less during the recession, and grew faster coming out of it. By 2016, San Diego added more tourism jobs to the region at a level three times higher than the overall economy’s growth rate (Figure 1). While San Diego’s tourism and overall employment growth is slightly lower than California, San Diego has kept pace with tourism job growth across the state.

![Figure 1. Employment Growth in San Diego County, Tourism and Overall Economy, 2006–2016](image)

Tourism jobs are growing across the entire county, particularly along the coast. Areas with the greatest absolute growth in job numbers include Oceanside, Carlsbad, Encinitas, San Diego and Chula Vista (Figure 2). The highest proportion of tourism workers — greater than 50 percent of the overall workforce — is within North County and the Metro area.3

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2 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
3 The zip codes that make up this area include: 92052, 92168, 92030, 92092, 91934, 92167, and 92112
While tourism activities are mostly locally-based (serving people who live in the county), there is notable export activity as well. Almost two-thirds of employers report that their customers are local, but about four in ten employers report that they serve clients from other states, and almost one-third note that they also serve international customers.

The seven tourism industries serve both local residents and tourists from outside of the county. These industries represent a wide array of business types and occupations, and each generates significant sales revenue from both visitors and residents of the county. The proportion of sales attributed to visitors (visitor-dependent sales) varies by industry:

- **Attractions** includes museums, historical sites, zoos, botanical gardens, nature parks, and amusement and theme parks. In 2016, total visitor-dependent sales for this industry were over $700 million, or 72 percent of total sales generated in the Attractions industry. The occupations with the most jobs in this industry are amusement and recreation attendants, cashiers, tour guides and escorts, and security guards.

- **Accommodations and Lodging** includes hotels and motels, casino hotels, bed-and-breakfast inns, RV parks and campgrounds, rooming and boarding houses, and all other traveler accommodations. In 2016, total visitor-dependent sales for this industry were approximately $2 billion, or 47 percent of all sales for this sector. The occupations in this industry with the most jobs include maids and housekeeping cleaners, hotel and motel clerks, waiters and waitresses, cafeteria attendants and bartender helpers, and cooks.

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4 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
• **Food and Beverage Services** includes food service contractors, caterers, drinking paces (alcoholic beverages), full- and limited-service restaurants, cafeterias, and snack and nonalcoholic bars. In 2016, total visitor-dependent sales for this industry were over $1.9 billion, or 21 percent of total sales in Food and Beverage Services. The most employed occupations in this industry include food preparation workers, waiters and waitresses, cooks, supervisors of food preparation, cafeteria attendants, and bartenders.

• **Recreation and Entertainment** includes marinas, recreational goods rental, sports teams and clubs, racetracks, casinos, other gambling industries, golf courses and country clubs, recreational and vacation camps, and all other amusement and recreation industries. In 2016, total visitor-dependent sales in this industry were over $715 million, or 33 percent of total sales within the industry. The most employed occupations in this industry include recreation attendants, fitness trainers and instructors, landscaping workers, waiters and waitresses, and lifeguards, and other recreational protective service workers.

• **Transportation** includes businesses related to scenic and sightseeing land transportation, scenic and sightseeing water transportation, scenic and sightseeing other transportation, and the charter bus industry. In 2016, total visitor-dependent sales in this industry were over $97.8 million, or 63 percent of total sales. The occupations with most jobs in this industry include bus drivers, transportation attendants, captains, mates, and pilots of water vessels, tours guides and escorts, and sailors and marine oilers.

• **Visitor and Travel Services** includes gift, novelty, and souvenir stores, art dealers, travel agencies, tour operators, and all other travel arrangement and reservation services. In 2016, total visitor-dependent sales in this industry were over $190 million in 2016, or 23 percent of all sales in this sector. The occupations most employed include retail salespersons, self-enrichment education teachers, travel agents, and other teachers and instructors.

• **Events and Conferences** includes convention and visitors’ bureaus and convention and trade show organizers. In 2016, total visitor-dependent sales were over $31 million, or 23 percent of total Events and Conferences sales. The most employed occupations include recordkeeping measurers and checkers, material movers, customer service representatives, sales representatives, and stock clerks.

Overall in 2016, visitor dependent sales generated over $5.8 billion in sales revenue, representing 32 percent of total sales revenue in this sector (Table 1). Translated to employment, this means that approximately 57,000 of all tourism jobs are estimated to be visitor-dependent. The three largest industries for employment in tourism are Food and Beverage Services, Accommodations and Lodging, and Attractions; they also record the highest visitor-dependent sales. With 8,262 locations across the county, the number of tourism-related establishments has increased by 13 percent since 2006.

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5 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
6 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker. Because the tourism sector is comprised of cross-industry occupations, such as food and beverage or recreation, activities within the sector cannot be entirely attributed to tourism alone. In light of this, the research team used the proportion of out-of-region sales revenue to determine the number of visitor-dependent jobs within each industry.
7 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
Tourism jobs and employment growth are spread across the county, and this study analyzes the sector across SDWP’s four geographic regions: metro, north, south and east. The majority of tourism jobs are located in the metro region, followed by north, south and east (Figure 3). Firms that are most likely to serve international clients are located in South County or the Metro area. These firms also tend to be within the Attractions, Accommodations and Lodging, or Events and Conferences industries. The Accommodations and Lodging industry is also more likely to have customers from across both the state and nation, while Transportation, Food and Beverage, and Recreation report mostly local customers within San Diego County. In general, firms that are smaller (with one to nine employees) or located within East County tend to serve local customers.

### Table 1. Tourism Sector by Industry in San Diego County

<table>
<thead>
<tr>
<th>Tourism Subsector</th>
<th>Overall Jobs</th>
<th>Total Establishments</th>
<th>Visitor-Dependent Jobs</th>
<th>2016 Visitor-Dependent Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractions</td>
<td>9,487</td>
<td>78</td>
<td>6,969</td>
<td>$735,079,535</td>
</tr>
<tr>
<td>Accommodations/Lodging</td>
<td>30,704</td>
<td>548</td>
<td>14,679</td>
<td>$2,016,791,568</td>
</tr>
<tr>
<td>Food and Beverage Services</td>
<td>128,174</td>
<td>6,168</td>
<td>28,128</td>
<td>$2,021,766,105</td>
</tr>
<tr>
<td>Recreation and Entertainment</td>
<td>16,657</td>
<td>762</td>
<td>5,266</td>
<td>$715,922,263</td>
</tr>
<tr>
<td>Transportation</td>
<td>1,251</td>
<td>64</td>
<td>790</td>
<td>$100,900,626</td>
</tr>
<tr>
<td>Visitor/Travel Services</td>
<td>4,894</td>
<td>592</td>
<td>1,204</td>
<td>$210,452,977</td>
</tr>
<tr>
<td>Events and Conferences</td>
<td>726</td>
<td>51</td>
<td>173</td>
<td>$33,521,992</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>191,892</strong></td>
<td><strong>8,263</strong></td>
<td><strong>57,209</strong></td>
<td><strong>$5,834,435,067</strong></td>
</tr>
</tbody>
</table>

### Tourism by Firm Size

The needs and impacts of tourism businesses vary by firm size. Small firms with one to nine employees are much more likely to serve local customers within San Diego County. Larger firms with 50 or more employees report serving both local and national customers.

For hiring, firms with 50 or more employees reported the greatest hiring difficulty, with more than two-thirds indicating that they had difficulty finding qualified entry- and non-entry-level applicants. Perhaps given this hiring difficulty, small business employers are more likely to expect both their permanent and temporary employee workforce to grow over the next 12 months. These employers are slightly more optimistic compared to larger firms.

Large firms are much more likely to be involved in the Hospitality or Hotels and Accommodations industries, while smaller firms with fewer than 50 workers identify mostly with the Food and Beverage, Recreation or Attractions industries.

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8 SDWP distributes funding across San Diego County based on a geographic distribution of need across four regions: metro, north, south and east: workforce.org/sites/default/files/regional_and_geographic_boundaries_-_reference_document.pdf
9 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
10 n=203
Tourism in the Metro Region

The metro region is home to 108,755 tourism workers, with the greatest concentration around the San Diego International Airport—zip code 92101 (Figure 4). In fact, the region accounts for 57 percent of the tourism sector’s employment in San Diego County. The metro region is more likely to serve both national and international customers compared to other regions.

The top three industries with the most employment in the region include Full-Service Restaurants, Hotels (except Casino Hotels) and Motels, and Limited-Service Restaurants. Each of these industries employ between 20,000 to 38,000 workers in the San Diego Metro area alone. Top occupations employed in the region include waiters and waitresses, combined food preparation and serving workers, restaurant cooks, maids and housekeeping cleaners, and first-line supervisors of food preparation and serving workers.

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11 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
12 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
The top employers around San Diego’s metro region are in nature parks, zoos and botanical gardens, or Hotels and Motels. These firms include SeaWorld, San Diego Zoo, Marriott, Hyatt and Evans Hotels; each of these establishments employ more than 250 workers.

Tourism in the North Region
With nearly 46,000 workers, the north region is the second largest region in terms of tourism employment numbers. In Carlsbad, 92008 alone is home to over 8,100 tourism workers. The region accounts for about a quarter of total tourism employment in the county. Unlike the south region and the metro region, north region’s tourism workers are more likely to serve both local and regional customers, though about 32 percent and 26 percent of employers respectively report national and international clients.

The top three industries with the most employment in the region include Full-Service Restaurants, Limited-Service Restaurants and Hotels (except Casino Hotels) and Motels. Amusement and Theme Parks employ about 3,000 workers in North County. Top occupations employed in the region include: combined food preparation and serving workers (including fast food), waiters and waitresses, restaurant and fast food cooks, and first-line supervisors of food preparation and serving workers.

The top tourism employers in the north region are in Casinos, Traveler Accommodations, and Amusement and Recreational Parks. These businesses include: Caesar Entertainment, Harrah’s Resort, Pala Casino Spa and Resort, Valley View Casino, and Hotel and Welk Resorts Group. Each of these firms employ more than 250 workers.

Figure 5. Tourism Employment by Zip Code, North San Diego, 2016

Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
Tourism in the South Region

The south region has approximately 20,400 tourism workers, or nearly 11 percent of the region’s tourism labor force. The majority of these workers are located around Chula Vista and Coronado; together these two areas account for about 10,000 workers (Figure 6). The south region serves local (62 percent), national (41 percent), and international clients (41 percent).14

![Figure 6. Tourism Employment by Zip Code, South San Diego, 2016](image)

The top three industries with the most employment in the region include Full-Service Restaurants, Limited-Service Restaurants, and Hotels (except Casino Hotels) and Motels. Top occupations employed in the region include: combined food preparation and serving workers (including fast food), waiters and waitresses and restaurant, and fast food cooks.

The top tourism employers in South County are Hotel Del Coronado, Loews Coronado Bay Resort, Marriott, Seven Mile Casino, and Global Experience Specialists. Global Experience Specialists is a medium-sized firm, employing roughly 50 to 249 employees, while the other firms employ 250 or more workers.

Tourism in the East Region

The east region has the smallest share of tourism employment—roughly 17,000 workers or about nine percent of the tourism workforce. These workers are mostly concentrated in La Mesa, El Cajon and Santee (Figure 7). This region is most likely to serve local customers—about 81 percent of employers

14 Employers could have multiple primary clientele groups, so totals can equal over 100 percent.
15 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
reported local clients. Thirteen percent of employers also reported serving clients from around the state, and six percent noted international customers.

Figure 7. Tourism Employment by Zip Code, East San Diego, 2016

The top three industries with the most employment in the region include: Full-Service Restaurants, Limited-Service Restaurants, and Snack and Nonalcoholic Beverage Bars. Top occupations employed in the region include combined food preparation and serving workers (including fast food), waiters and waitresses and restaurant, and fast food cooks.

The top employers in East County are in the Casino industry and support more than 250 workers. These businesses include Barona Resort and Casino, Viejas Enterprises, and Sycuan Casino.

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16 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
OCCUPATIONAL OVERVIEW

During the analysis of tourism labor market information, occupations were organized into three tiers based on average hourly wage and skill requirements:

- **Tier 1 Occupations** are typically the highest-paying, highest-skilled occupations in the economy. As of 2016, the average annual wage for Tier 1 occupations in San Diego County was approximately $97,261 a year. This occupational category includes positions such as managers and business operations specialists.

- **Tier 2 Occupations** are typically the middle-skill, middle-wage occupations that have historically provided the majority of employment in the country. As of 2016, the average annual wage for Tier 2 occupations in San Diego County was approximately $48,485 a year. This occupational category includes positions such as office and administrative positions, sales representatives, first-line supervisors, and customer service representatives.

- **Tier 3 Occupations** are typically the lowest-paying, lowest-skilled occupations in the economy. As of 2016, the average annual wage for Tier 3 occupations in San Diego County was approximately $27,664 a year. These include positions such as food service and retail positions, waiters and waitresses, dishwashers, and cashiers.

In general, tourism occupations are focused heavily in low-wage, low-skill occupations. Eighty-five percent of all occupations in the tourism sector are tier 3 occupations, while 11 percent are tier 2 and nearly four percent are tier 1 occupations (Table 2). Transportation, Visitor and Travel Services, Events and Conferences—saw employment decline over the last decade; despite this decline, they have a higher proportion of tier 1 and tier 2 employment opportunities (Table 2).

<table>
<thead>
<tr>
<th>Industry</th>
<th>Employment Growth 2006–2016</th>
<th>Average Wage 2016</th>
<th>% Tier 1 Occupations</th>
<th>% Tier 2 Occupations</th>
<th>% Tier 3 Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractions</td>
<td>32.0%</td>
<td>$33,363</td>
<td>11.7%</td>
<td>18.5%</td>
<td>69.8%</td>
</tr>
<tr>
<td>Food and Beverage Services</td>
<td>26.0%</td>
<td>$24,139</td>
<td>0.9%</td>
<td>3.0%</td>
<td>96.1%</td>
</tr>
<tr>
<td>Recreation and Entertainment</td>
<td>23.0%</td>
<td>$47,751</td>
<td>8.6%</td>
<td>25.4%</td>
<td>66.0%</td>
</tr>
<tr>
<td>Accommodations and Lodging</td>
<td>5.0%</td>
<td>$38,991</td>
<td>7.1%</td>
<td>24.8%</td>
<td>68.1%</td>
</tr>
<tr>
<td>Visitor and Travel Services</td>
<td>-9.0%</td>
<td>$41,749</td>
<td>12.9%</td>
<td>56.2%</td>
<td>30.9%</td>
</tr>
<tr>
<td>Events and Conferences</td>
<td>-10.0%</td>
<td>$60,554</td>
<td>10.8%</td>
<td>73.0%</td>
<td>16.2%</td>
</tr>
<tr>
<td>Transportation</td>
<td>-14.0%</td>
<td>$39,778</td>
<td>8.1%</td>
<td>47.2%</td>
<td>44.7%</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td><strong>20.0%</strong></td>
<td><strong>$29,710</strong></td>
<td><strong>3.8%</strong></td>
<td><strong>10.9%</strong></td>
<td><strong>85.4%</strong></td>
</tr>
</tbody>
</table>

The concentration of jobs in tier 3 can be explained by the types of occupations that are experiencing the greatest growth in the tourism sector.

The following table highlights the top 15 occupations in San Diego County’s tourism sector, based on overall percentage of employment in the industry, and to some extent historical growth between 2006

Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
and 2016. Much of the employment in the tourism sector is concentrated in low-wage, low-skill food service occupations such as waiters and waitresses, cooks, food preparation workers, and dishwashers. These occupations, with the exception of food service managers, make under $15 an hour, and require only a high school diploma or less (Table 3).¹⁸

### Table 3. Top 15 Tourism Occupations in San Diego County¹⁹

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Employment 2016</th>
<th>% Change 2006-2016</th>
<th>% of Total Jobs 2016</th>
<th>Median Hourly Earnings</th>
<th>Typical Entry Level Education</th>
<th>Work Experience Required</th>
<th>Typical On-The-Job Training (OJT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiters and Waitresses</td>
<td>29,566</td>
<td>20%</td>
<td>15.4%</td>
<td>$12.00</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Combined Food Preparation and Serving Workers, Including Fast Food</td>
<td>27,377</td>
<td>31%</td>
<td>14.3%</td>
<td>$9.59</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Cooks, Restaurant</td>
<td>14,249</td>
<td>31%</td>
<td>7.4%</td>
<td>$11.86</td>
<td>No formal educational credential</td>
<td>Less than 5 years</td>
<td>Moderate OJT</td>
</tr>
<tr>
<td>First-Line Supervisors of Food Preparation and Serving Workers</td>
<td>8,205</td>
<td>29%</td>
<td>4.3%</td>
<td>$14.47</td>
<td>High school diploma or equivalent</td>
<td>Less than 5 years</td>
<td>None</td>
</tr>
<tr>
<td>Food Preparation Workers</td>
<td>7,954</td>
<td>28%</td>
<td>4.1%</td>
<td>$10.16</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Cooks, Fast Food</td>
<td>7,714</td>
<td>17%</td>
<td>4.0%</td>
<td>$9.69</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Maids and Housekeeping Cleaners</td>
<td>7,227</td>
<td>10%</td>
<td>3.8%</td>
<td>$10.72</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Dishwashers</td>
<td>6,586</td>
<td>16%</td>
<td>3.4%</td>
<td>$9.45</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Dining Room and Cafeteria Attendants and Bartender Helpers</td>
<td>6,554</td>
<td>23%</td>
<td>3.4%</td>
<td>$9.47</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Bartenders</td>
<td>5,658</td>
<td>22%</td>
<td>2.9%</td>
<td>$12.28</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
</tbody>
</table>

¹⁸ Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker. The top 15 occupations were selected based on percent of total jobs in the industry and to some extent historical growth between 2006 and 2016.

¹⁹ Some of the wages cited in the report are below the state minimum wage of 10.50 an hour because annual wage data from 2016 is used. The new state minimum wage went into effect July 2016, so it will be reflected in 2017 data.
### Tourism sector

#### Occupations

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Employment 2016</th>
<th>% Change 2006-2016</th>
<th>% of Total Jobs 2016</th>
<th>Median Hourly Earnings</th>
<th>Typical Entry Level Education</th>
<th>Work Experience Required</th>
<th>Typical On-The-Job Training (OJT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashiers</td>
<td>5,431</td>
<td>18%</td>
<td>2.8%</td>
<td>$9.77</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Amusement and Recreation Attendants</td>
<td>4,951</td>
<td>35%</td>
<td>2.6%</td>
<td>$9.62</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop</td>
<td>4,779</td>
<td>23%</td>
<td>2.5%</td>
<td>$9.43</td>
<td>No formal educational credential</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Counter Attendants, Cafeteria, Food Concession, and Coffee Shop</td>
<td>4,394</td>
<td>27%</td>
<td>2.3%</td>
<td>$10.39</td>
<td>No formal educational credential</td>
<td>None</td>
<td>Short-term OJT</td>
</tr>
<tr>
<td>Food Service Managers</td>
<td>3,205</td>
<td>28%</td>
<td>1.7%</td>
<td>$22.23</td>
<td>High school diploma or equivalent</td>
<td>Less than 5 years</td>
<td>None</td>
</tr>
</tbody>
</table>

#### Career Ladders and Lattices

Tourism employers favor incumbent workers, with the majority reporting that they usually or frequently promote from within for non-entry-level occupations at their company. About four in 10 employers reported that they usually promote from within, with an additional 45 percent who reported they frequently promote from within. Less than two percent of employers indicated they never promote current workers to non-entry-level positions (Figure 8).

**Figure 8. Frequency of Promotion for Non-entry-level Occupations**

![Figure 8. Frequency of Promotion for Non-entry-level Occupations](image)

- **40.3%** Usually (70 percent of the time or more)
- **12.9%** Frequently (31 percent to 69 percent of the time)
- **45.2%** Seldom (1 percent to 30 percent of the time)
- **1.6%** Never

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20 Primary survey research conducted by BW Research for this study. See Employer Survey Toplines at end of report for full survey data.
Many employers surveyed indicated people beginning in entry-level positions such as customer service or office and administrative positions have successfully moved up in their organization. Of the 53 employers who responded, 54.8 percent indicated people in customer service positions (not in food and beverage) have moved into a managerial or supervisor position (Figure 9).

**Figure 9. Positions an Individual in a Customer Service Position has successfully been promoted into (not in Food and Beverage) (n=53)**

<table>
<thead>
<tr>
<th>Position</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>34%</td>
</tr>
<tr>
<td>Supervisor</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
<tr>
<td>Recreation leader/Coordinator</td>
<td>8%</td>
</tr>
<tr>
<td>None</td>
<td>6%</td>
</tr>
<tr>
<td>Front desk agent</td>
<td>6%</td>
</tr>
<tr>
<td>Accountant/administrative position</td>
<td>4%</td>
</tr>
<tr>
<td>Customer service, sales and marketing lead</td>
<td>4%</td>
</tr>
<tr>
<td>Service representative lead</td>
<td>4%</td>
</tr>
<tr>
<td>Visitor services associate</td>
<td>4%</td>
</tr>
<tr>
<td>Organizer</td>
<td>2%</td>
</tr>
<tr>
<td>Director</td>
<td>2%</td>
</tr>
</tbody>
</table>

Within customer service positions in Food and Beverage, 60 percent of employers\(^{21}\) asked indicated individuals in a customer service role successfully moved into a managerial position (Figure 10).

\(^{21}\) n=68
Figure 10. Positions an Individual in a Customer Service Position has successfully been promoted into (in Food and Beverage) (n=68)

<table>
<thead>
<tr>
<th>Position</th>
<th>Promoted Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>60%</td>
</tr>
<tr>
<td>Supervisor</td>
<td>25%</td>
</tr>
<tr>
<td>Server/attendant</td>
<td>19%</td>
</tr>
<tr>
<td>Team leader/assistant</td>
<td>10%</td>
</tr>
<tr>
<td>None</td>
<td>9%</td>
</tr>
<tr>
<td>Chef/cook</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>Director</td>
<td>4%</td>
</tr>
<tr>
<td>Cashier</td>
<td>3%</td>
</tr>
<tr>
<td>Market president</td>
<td>2%</td>
</tr>
<tr>
<td>Marketing Specialist</td>
<td>2%</td>
</tr>
<tr>
<td>Teacher</td>
<td>2%</td>
</tr>
<tr>
<td>Park Ranger</td>
<td>2%</td>
</tr>
</tbody>
</table>

The tables below highlight potential career pathway progressions within three industries in tourism: Accommodations and Lodging, Attractions, and Food and Beverage. The pathways depicted are meant to be more of a “sample” path, though occupations were selected based on the number of jobs and availability of employment opportunity in San Diego County.

Table 4. Accommodations and Lodging Career Pathway22

<table>
<thead>
<tr>
<th>Level</th>
<th>Typical Occupations</th>
<th>Median Hourly Wage, 2016</th>
<th>Growth, 2006-2016</th>
<th>Typical Education and Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry-level</td>
<td>Maids and housekeeping cleaners; hotel, motel, and resort desk clerks; waiters and waitresses</td>
<td>$11.85</td>
<td>5.0%</td>
<td>High school or less and short-term on-the-job training</td>
</tr>
<tr>
<td>Mid-level</td>
<td>Maintenance and repair workers; lodging managers; first-line supervisors of office and administrative support</td>
<td>$22.10</td>
<td>8.6%</td>
<td>High school, less than five years work experience, and long-term on-the-job training</td>
</tr>
<tr>
<td>Senior-level</td>
<td>Meeting, convention, and event planners; general and operations managers; sales managers</td>
<td>$35.06</td>
<td>9.1%</td>
<td>Bachelor's degree and about five years or more work experience</td>
</tr>
</tbody>
</table>

22 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
Table 5. Attractions Career Pathway

<table>
<thead>
<tr>
<th>Level</th>
<th>Typical Occupations</th>
<th>Median Hourly Wage, 2016</th>
<th>Growth, 2006-2016</th>
<th>Typical Education and Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry-level</td>
<td>Amusement and recreation attendants; cashiers; security guards</td>
<td>$11.26</td>
<td>36.3%</td>
<td>High school or less and short-term on-the-job training</td>
</tr>
<tr>
<td>Mid-level</td>
<td>Secretaries and administrative assistants; bookkeeping, accounting, and auditing clerks; first-line supervisors of office and administrative support</td>
<td>$18.83</td>
<td>27.8%</td>
<td>High school or some college and short- to moderate-term on-the-job training</td>
</tr>
<tr>
<td>Senior-level</td>
<td>General and operations managers; business operations specialists; market research analysts and marketing specialists</td>
<td>$35.07</td>
<td>33.3%</td>
<td>Bachelor's degree and about five years work experience</td>
</tr>
</tbody>
</table>

Table 6. Food and Beverage Career Pathway

<table>
<thead>
<tr>
<th>Level</th>
<th>Typical Occupations</th>
<th>Median Hourly Wage, 2016</th>
<th>Growth, 2006-2016</th>
<th>Typical Education and Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry-level</td>
<td>Food preparation and serving workers; waiters and waitresses; cooks</td>
<td>$10.91</td>
<td>26.1%</td>
<td>High school or less and short- to moderate-term on-the-job training</td>
</tr>
<tr>
<td>Mid-level</td>
<td>Food service managers; chefs and head cooks; bookkeeping, accounting, and auditing clerks</td>
<td>$21.48</td>
<td>27.1%</td>
<td>High school or some college, about five years work experience, and moderate-term on-the-job training</td>
</tr>
<tr>
<td>Senior-level</td>
<td>General and operations managers; accountants and auditors; meeting, convention, and event planners</td>
<td>$46.62</td>
<td>21.7%</td>
<td>Bachelor's degree and about five years work experience</td>
</tr>
</tbody>
</table>

Because career pathways within the tourism sector can be limited by the small number of high-skill, high-wage tourism occupations, it is important to identify the key skills that tourism workers gain from on-the-job training and the additional industries that these skills can then connect them to. Building upon these areas of expertise provides entry-level tourism workers with greater opportunity to transition into alternate careers and growing pathways.

A career lattice is a framework through which employees can move through a variety of positions across different industries, as long as they acquire the appropriate transferable skillsets. A lattice allows for more flexibility and growth, as individuals are not simply moving upward, but instead have the opportunity to move outward and design their own pathways based on the skills they have honed in previous positions.

The featured industries in Table 7 provide career lattices for tourism workers into the Finance, Insurance, and Real Estate industry, Retail industry, and Professional and Business Services industry. These three industries were selected based on their skillset similarities, namely customer service, problem-solving, and communication skills, as well as the opportunity for further skill development and

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23 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
24 Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
career progression into higher-paying industries. Each of these three industries provide a higher average annual wage — between $41,000 and $92,000 — compared to the tourism sector.

An entry-level worker beginning their career in tourism as a waiter, cashier or salesperson could move into occupations within the Retail industry as a supervisor or ultimately sales manager. Workers that wish to move into the Retail industry also have the additional option of completing short-term training and certification programs to work as a Health Care sales representatives or pharmacy technicians; these individuals could ultimately move into managerial positions or even become a pharmacist if they choose to pursue further schooling.

Entry-level customer service representatives, Retail salespersons or desk clerks in tourism develop skills that will support a move into the Finance, Insurance and Real Estate industry. This industry supports just over 68,000 workers in San Diego County with an annual average wage of $92,195. A customer service representative in tourism who chooses to pursue a post-secondary non-degree award such as a certificate may move into the Finance industry and work as a financial services sales agent. Further education in a related degree or field would allow these individuals to progress into managerial positions or assume roles as accounts and auditors or financial analysts.

Landscapers, janitors, cashiers or security guards in tourism may also move into Professional and Business Services with additional certifications and non-degree awards. Such occupations include electricians, bill and account collectors or bookkeepers. From these mid-level occupations, workers could then progress into positions that require more education and experience such as analysts, operations specialists or managers.

<table>
<thead>
<tr>
<th>Total Employment, 2016</th>
<th>Average Wage, 2016</th>
<th>Entry-level Tourism Occupations</th>
<th>Mid-level Lattice Occupations</th>
<th>Senior-level Lattice Occupations</th>
</tr>
</thead>
</table>
| Finance, Insurance, and Real Estate | 68,085 | $92,195 | • Customer Service Representatives  
• Retail Salespersons  
• Desk Clerks | • Insurance or Financial Services Sales Agents  
• Customer Service Representatives | • General and Operations Managers  
• Accountants and Auditors  
• Financial Analysts |
| Retail | 151,744 | $41,416 | • Waiters and Waitresses  
• Bartenders  
• Cashiers  
• Retail Salespersons | • Pharmacy Technicians  
• Secretaries and Administrative Assistants  
• First-line Supervisors | • Sales Managers  
• Pharmacists  
• Sales Representatives (Scientific Products) |
| Professional and Business Services | 144,515 | $72,874 | • Landscaping and Groundskeeping Workers  
• Janitors and Cleaners  
• Cashiers  
• Security Guards | • Electricians  
• Maintenance and Repair Workers  
• Bill and Account Collectors  
• Bookkeeping, Accounting, and Auditing Clerks | • Market Research Analysts  
• Business Operations Specialists  
• Human Resources Specialists  
• Marketing Managers |

Source: QCEW Employees & Non-QCEW Employees – EMSI 2017.2 Class of Worker.
TRAINING, EDUCATION AND SKILLS FOR TOURISM

Customer communication, engagement and service are the foundation of the tourism sector. Tourism trainers, educators and employers are continually looking to identify and develop individuals that demonstrate a passion for customer service. Training and education for the tourism sector typically fall into three general categories:

- **Foundational customer service and basic workforce skills**: Human Resources (HR) executives shared that these fundamental skills are associated with showing up for work on time, looking presentable and effectively communicating and engaging with the customer. Several experienced HR executives in San Diego’s tourism sector also identified the importance of being passionate about customer service for people who want to succeed in the tourism sector. These skills can be introduced in the classroom, but are usually developed through work experience. Tourism employers also emphasized the importance of customer service, particularly for entry-level employee training. Without this skill, it becomes difficult for individuals to progress within a tourism career pathway.

- **Technical skills for different aspects of an organization**: These include the operational, marketing and administrative skills that are critical for running tourism businesses. While this ability to manage and direct different aspects of a tourism business can be introduced in the classroom, it is more often learned through ‘hands-on’ training and experience. Larger tourism employers typically have internal training programs and are more likely to promote from within, while smaller tourism employers will identify degrees or certificates they prefer and/or recruit individuals who have the appropriate experience from outside their organization.

- **Advanced degrees and management training and education**: This is more for senior managers and for specialized occupations in finance, accounting or human resources. Advanced written and analytical skills are often required for professional positions at the highest level of tourism career pathways. This can include both a four-year college degree

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Career Vignette

Margie Sitton

Margie Sitton pored herself a long and successful career pathway within San Diego County’s Tourism sector. She began her career working as a server at her family’s restaurant and has worked for Sheraton, Hilton, and Starwood hotels over the last three decades. Ms. Sitton is now Senior Vice President of Sales for the San Diego Tourism Authority. She has had the opportunity to work with world leaders across private industry, government, and the church as she navigated her career within the Tourism sector.

Margie studied Business in college and says that her college experience in leadership roles across various campus organizations has helped in her career today. She has also taken Sheraton and Starwood leadership and sales courses along the way. Within the hotel world, Margie has worked as a front desk service agent, front office manager, catering coordinator, sales manager, director of sales and marketing, as well as regional director and vice president.

The sector offers a number of advantages for young, entry-level workers, as hotels often promote from within. “There are numerous opportunities... this industry opens doors that you didn’t even know existed.” Margie notes. The sector also offers career pathways within a number of various sub-sectors, including Food and Beverage, Operations, Human Resources, Finance and Accounting, and Sales and Marketing. Sales and Marketing in particular presents both an interesting and growing field given the rise of social media marketing.

Successful workers must have an outgoing personality, good attitude, and the eagerness to learn and understand the nuances of all departments that support the firm. “Keep an open mind about all the opportunities... start off at the front desk to understand how everything operates. Embrace the chaos, there is no routine.”
and/or an internal management training program, but typically requires both formal classroom training and contextual, hands-on experience.

Students and job seekers interested in working in this sector have a multitude of resources in San Diego County to consider as they examine potential employment in the tourism sector. These different programs and facilities for the tourism sector can be organized into four educational areas:

- **High schools**: This is where the tourism pipeline ideally begins, with students being exposed to employment opportunities in this sector and beginning to understand the importance of developing their communication, analytical and problem-solving skills.

- **Internal foundational training**: Larger tourism employers in San Diego, such as Sea World, do a considerable amount of basic foundational workforce and customer service training for their seasonal and professional employees. Tourism is one of the few sectors where employees can move to the top of a given career pathway with hands-on experience, internal training and few, if any, educational requirements beyond a high school diploma. Some larger hospitality employers, like larger hotel and restaurant chains would prefer a four-year college degree for their senior-level managers but that is generally not an industry standard.

- **Community colleges, internal technical and related programs**: Community colleges and internal technical programs will take individuals who are already experienced in the tourism sector and prepare them for a professional (human resources, finance, accounting) or management track with their employer. MiraCosta (North), Grossmont (East), Mesa (Metro) and Southwestern (South) all have Hospitality and/or Culinary Arts associate degree programs. These programs typically require courses in human resources, sales, planning, and finance tailored to the tourism and hospitality.

- **University and internal management training**: These are the education and training programs that prepare senior and mid-level managers as well as tourism professionals for their highest level of training. Many larger hotels like to feed their internal management training programs with entry-level managers right out of SDSU’s bachelor’s degree program in Hospitality & Tourism Management. San Diego State University has both bachelor’s and master’s degree programs in Hospitality and Tourism Management. These were identified by several employers as premier programs for professionals who want to work in the tourism sector.
Employer Satisfaction with Education and Training Resources

Most employers report satisfaction with San Diego County’s workforce and business climate. At least six in 10 employers report that they are either “very” or “somewhat” satisfied with their ability to recruit workers and the region’s education and training institutions. Employers are most satisfied with the region’s supply of workers that are comfortable working with customers from different cultures (84 percent), as well as their ability to retain valued employees over time (82 percent) (Figure 9).

Mary Burton began her career in the Tourism industry sector in an entry-level position in the Human Resources department back when it was called Personnel at United Airlines in San Francisco. Mary facilitated interview paperwork for hiring airline reservationists and ticket agents. Early day-to-day Human Resources assignments included helping others make career choices, prepare for interviews, develop skills, and build job satisfaction; these skills went a long way in establishing her career pathway. In the Tourism industry, dedicated employees that deliver exemplary service are important. Even outside of career development, a positive experience can build powerful relationships, communities, and memories that may last a lifetime.

Ms. Burton has worked in the Human Resources department at SeaWorld for over two decades. Most of her career has been dedicated to SeaWorld, though she did spend a brief couple years between 2015 and 2016 as the Association Director of Human Resources for the YMCA in San Diego County. While SeaWorld does not provide formal apprenticeships, they offer tuition reimbursement and several internal training opportunities that build service and leadership skills, such as interpersonal and communication skills. Tens of thousands of San Diegans have called SeaWorld a first job. The Tourism sector provides an exceptional opportunity for both skill development and networking, as customer service skills are important not only within the Tourism sector, but across other industries and occupations.

Figure 11. Satisfaction with Workforce and Business Climate

- Ability to recruit workers that are comfortable working with customers from different cultures: Very satisfied - 52%, Somewhat satisfied - 33%, Neither satisfied nor dissatisfied - 10%, Somewhat dissatisfied - 6%
- Ability to recruit workers that can speak Spanish or other non-English languages: Very satisfied - 48%, Somewhat satisfied - 31%, Neither satisfied nor dissatisfied - 14%, Somewhat dissatisfied - 6%
- Ability to retain valued employees over time: Very satisfied - 41%, Somewhat satisfied - 42%, Neither satisfied nor dissatisfied - 10%, Somewhat dissatisfied - 6%
- Ability to recruit workers that have strong customer service skills: Very satisfied - 38%, Somewhat satisfied - 42%, Neither satisfied nor dissatisfied - 9%, Somewhat dissatisfied - 8%
- Education and training institutions that help develop qualified workers: Very satisfied - 29%, Somewhat satisfied - 32%, Neither satisfied nor dissatisfied - 25%, Somewhat dissatisfied - 11%

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26 Primary survey research conducted by BW Research for this study. See Employer Survey Toplines at end of report for full survey data.
Finding qualified workers for both entry- and non-entry-level positions has been difficult over the last 12 months. About half of employers note that they have had either “great” or “some” difficulty finding qualified entry- and non-entry-level workers over the last 12 months (Figure 10).

Figure 12. Employer Hiring Difficulty for Entry- and Non-entry-level Occupations in the Tourism Sector

<table>
<thead>
<tr>
<th></th>
<th>Little to no difficulty</th>
<th>Some difficulty</th>
<th>Great difficulty</th>
<th>Don’t know/Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry-level Occupations</td>
<td>40.4%</td>
<td>38.4%</td>
<td>16.3%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Non entry-level Occupations</td>
<td>34.5%</td>
<td>36.0%</td>
<td>13.3%</td>
<td>16.3%</td>
</tr>
</tbody>
</table>

The ability to speak English and be understood easily is the most highly rated important skill for entry-level occupations, particularly for cooks and janitors, maids and other cleaning positions. The ability to write effectively in English and learn new technologies is also important, particularly for customer service and administrative positions (Figure 13).

Figure 13. Percent of Employers Rating Skill “Very Important” for Entry-level Occupations

<table>
<thead>
<tr>
<th>Janitors, maids, and other cleaning positions</th>
<th>Writing in English</th>
<th>Basic math fluency</th>
<th>Verbal clarity in English</th>
<th>Verbal clarity, non-English</th>
<th>Learn and use new technologies</th>
<th>Product/service knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food preparation and cooks</td>
<td>16%</td>
<td>9%</td>
<td>33%</td>
<td>22%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>Cashiers, attendants, or sales</td>
<td>16%</td>
<td>13%</td>
<td>27%</td>
<td>15%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Office and administrative positions</td>
<td>16%</td>
<td>16%</td>
<td>21%</td>
<td>10%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Customer service positions in food and beverage</td>
<td>20%</td>
<td>17%</td>
<td>21%</td>
<td>10%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Customer service positions, not in food and beverage</td>
<td>17%</td>
<td>14%</td>
<td>22%</td>
<td>7%</td>
<td>18%</td>
<td>21%</td>
</tr>
</tbody>
</table>

27 Primary survey research conducted by BW Research for this study. See Employer Survey Toplines at end of report for full survey data.
28 Primary survey research conducted by BW Research for this study. See Employer Survey Toplines at end of report for full survey data.
The most highly rated skills for non-entry-level positions are relevant work experience, management skills, and training and education. Technical skills specific to the position or industry are particularly important for human resource positions (Figure 14).

Figure 14. Percent of Employers Rating Skill “Very Important” for Non-entry-level Occupations

<table>
<thead>
<tr>
<th>Skill Category</th>
<th>Customer relations positions</th>
<th>Office and administrative positions</th>
<th>Finance and accounting positions</th>
<th>Management positions, incl. supervisors and store managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevant industry experience</td>
<td>20%</td>
<td>18%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>Jon/industry-specific technical skills</td>
<td>17%</td>
<td>18%</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Social and communication skills</td>
<td>18%</td>
<td>13%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Appropriate training or education</td>
<td>18%</td>
<td>21%</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>Industry-specific credentials</td>
<td>5%</td>
<td>8%</td>
<td>7%</td>
<td>16%</td>
</tr>
</tbody>
</table>

29 Work ethic/reliability excluded from chart (only 2% for customer relations); HR Positions excluded for low amount of responses (n=4).
30 Primary survey research conducted by BW Research for this study. See Employer Survey Toplines at end of report for full survey data.
CONCLUSION AND RECOMMENDATIONS

The information in this study is intended to help career counselors, educators, community partners and other workforce development professionals better understand the industry and its employers. The following section summarizes the findings from the data analysis, employer surveys, and in-depth interviews to provide recommendations to help the workforce development system better respond to the labor market needs of the tourism sector:

The tourism sector requires that workers have soft skills, which can be developed on the job. Working in tourism for six months to a year during or after high school, and before committing to a specific college degree or certification program, can provide significant benefits for young career-seekers (16 to 24 years old). Entry-level employment in the tourism sector provides young adults with opportunity to assess and develop their foundational workforce and customer service skills. These skills will be valuable in almost any career pathway. This early employment opportunity also has the benefit of exposing young adults to different industry and occupational pathways in the tourism sector.

Career pathways in tourism are valuable opportunities for the right individual. Tourism educators and employers separately identified the importance of being comfortable with the sector and its emphasis on customer service, non-traditional hours and ability to feel at ease in a chaotic environment. Students and jobseekers who are interested in moving up a tourism career pathway should find an entry-level position and work for at least six months before enrolling into a tourism-related program. Workforce partners in the region should continue to connect young career seekers to employment opportunities in tourism, educate them on the ability to develop valuable workforce and customer service skills, and expose them to additional career pathways and lattices.

Training and experience in tourism can benefit workforce development in other sectors. The tourism sector provides an important stepping stone for young workers and those with lower educational attainment who may not have as many employment opportunities in other sectors. While not every entry-level position will become a career pathway within tourism given the low volume of high-wage tourism occupations, the skillsets gained through on-the-job training and experience give workers the flexibility to move into other industries.

Educating job seekers on these career lattice options is important as individuals seek to move through positions across different industries, acquiring the appropriate and transferable skillsets necessary to excel into higher-paying careers. Some examples of industries a job seeker can move into from tourism include: retail, finance, insurance, real estate, and professional and business services.

Emerging skills are needed in the tourism workforce development pipeline. Tourism employers identified several skills and abilities that are scarce within San Diego County’s tourism pipeline. These skills and abilities could be part of a broader workforce development strategy within the region:

- Effective marketing and communication strategies using social media: Many of the tourism sector’s senior marketing decision-makers are having challenges understanding and developing strategies to effectively use social media. Career seekers interested in marketing and

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31 Tourism employers and educators indicated this during interviews conducted over the course of the study.
32 Recommendations based on tourism employer interviews conducted for the study.
communications and a career in the tourism sector should be well-versed on marketing strategies using social media platforms.

- **Cross-training and converging skill development in tourism operations and management:** Managers and decision-makers at larger organizations within the tourism sector need to understand the specific challenges different divisions and departments face on a day-to-day basis. Several tourism employers discussed the value of cross-training managers in different departments and training them in relevant technical skills to develop more effective operations supervisors and senior managers. In a workforce environment that often emphasizes technical specialization, tourism employers also identified the need for understanding multiple specialties.

- **Training entrepreneurs in the dynamic and chaotic environment of the tourism sector:** The tourism sector offers valuable training and skill development opportunities for individuals interested in growing their own business, especially businesses directly serving customers. Students and career seekers interested in entrepreneurship should be educated on the opportunities available to them in this sector.
APPENDIX A: METHODOLOGY

Quantitative Primary and Secondary Data Collection
BW Research conducted secondary data analysis using data sources such as EMSI, the Bureau of Labor Statistics Quarterly Census of Employment and Wages and Workforce Indicators, and IMPLAN to both understand the tourism labor market and the proportion of employment that is tied to tourism revenue.

The first two steps of the secondary data analysis were to understand the size and scope of tourism jobs in San Diego County and the proportion of jobs that are connected to tourism (for example, full-service restaurants), but not primarily dependent on it. To determine this proportion, the percentage of exported sales in each industry segment was used to determine the visitor-dependent employment and to categorize each industry sector into either primary or secondary.

This allowed us to determine the industry and occupational segments used to define tourism jobs. Additionally, the secondary data analysis focused on critical wages, knowledge, skills and abilities (KSA), typical education requirements, and current job openings for each standard occupational classification.

In addition to secondary data analysis, BW Research fielded a primary survey research component for this project. The table below provides an overview of the survey methodology utilized for this project.

<table>
<thead>
<tr>
<th>Method</th>
<th>Telephone and Web Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe</td>
<td>8,262 Tourism Employers in San Diego County</td>
</tr>
<tr>
<td>Number of Respondents</td>
<td>203 Employers Completed a Survey</td>
</tr>
<tr>
<td>Average Length</td>
<td>17 minutes</td>
</tr>
<tr>
<td>Field Dates</td>
<td>April 6 - May 5, 2017</td>
</tr>
<tr>
<td>Margin of Error</td>
<td>The maximum margin of error for questions answered by all 203 respondents was +/-6.79% (95% level of confidence)</td>
</tr>
</tbody>
</table>

Prior to beginning the project, San Diego Workforce Partnership staff and BW Research met to determine the research objectives for this study. The main research objectives were to analyze the region’s tourism sector, focusing on employment and career pathway opportunities, the economic impact of the sector’s industries, and workforce challenges for employers.

SDWP and BW Research worked to develop a survey instrument that met all the research objectives of the study. In developing the instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey. BW Research utilized a mixed-method sampling plan that incorporates both phone and web survey completes, as experience indicates that offering two modes of completion results in higher completion rates. Throughout data collection, BW Research checked the data for accuracy and completion.
The overall margin of error for the study, at the 95 percent level of confidence, is +/-6.79 percent for questions answered by all 203 respondents.

Qualitative Data Collection
In addition to a quantitative employer survey, BW Research also conducted qualitative executive interviews with educators, employers, and employees who have successfully navigated San Diego County’s tourism economy. BW Research completed 20 executive interviews with the employers, employees, and educators from the County’s tourism and hospitality industries.
APPENDIX B: EMPLOYER SURVEY TOPLINES

A. Are you involved in staffing or hiring decisions at your firm or organization? (If not, could you please connect me to the appropriate person?)

    100.0%  Yes [CONTINUE]
    0.0%    No [TERMINATE]
    0.0%    Not sure [TERMINATE]

B. Does your company or organization have one or more locations in San Diego County? (If yes) How many locations and in which cities?

    45.3%  1 location
    8.9%   2 locations
    45.8%  3 or more locations

C. In which San Diego County city is your company or organization located [Don’t Read]?

    69.0%  San Diego
    23.6%  Carlsbad
    21.2%  Oceanside
    19.2%  Escondido
    17.2%  El Cajon
    14.3%  Vista
    13.3%  San Marcos
    12.3%  Del Mar
    12.3%  Coronado
    10.8%  Encinitas
    10.8%  Poway
    10.8%  Chula Vista
    8.9%   Solana Beach
    3.4%   La Mesa
    3.4%   National City
    1.5%   Spring Valley
    1.5%   Lakeside
    1.0%   Fallbrook
    3.0%   Other
SECTION 1 - Organization-Related Questions

I’d like to begin by asking you a few general questions about your firm and your current employees. For this survey, please only answer for your current business location. If your firm has other locations, please do not include their data.

1. Including all full-time and part-time employees, how many permanent employees work at your location? (Do not accept 0 as a response for Q1)

   19.7% 1 to 4 employees
   15.8% 5 to 9 employees
   17.2% 10 to 19 employees
   31.5% 20 to 49 employees
   6.9% 50 to 99 employees
   7.4% 100 or more employees
   1.5% Don’t know/Refused

2. If you currently have [TAKE Q1 #] full-time and part-time permanent employees at your location, how many more or fewer employees do you expect to have at your location 12 months from now?

   35.0% More
   0.5% Fewer
   59.6% Same number
   4.9% Don’t know/Refused

   [If amount differs by 10% or more in either direction, ask: ]
   Just to confirm, you currently have ____ permanent employees and you expect to have ____ (more/less) employees, for a total of ____ permanent employees 12 months from now.

3. Including all full-time and part-time employees, how many temporary [IF NEEDED: this includes seasonal, contract and any other temporary employees] employees work at your location?

   68.0% No temporary employees
   9.9% 1 to 4 employees
   7.4% 5 to 9 employees
   4.9% 10 to 19 employees
   7.4% 20 to 49 employees
   1.0% 50 to 99 employees
   0.5% 100 or more employees
1.0% Don’t know/Refused

4. If you currently have [TAKE Q3 #] full-time and part-time temporary employees at your location, how many more or less employees do you expect to have at your location 12 months from now? (n=65)

27.7% More
6.2% Fewer
58.5% Same number
7.7% Don’t know/Refused

[If amount differs by 10% or more in either direction, ask: ]
Just to confirm, you currently have ____ temporary employees and you expect to have _____ (more/less) employees, for a total of ____ temporary employees 12 months from now.

SECTION 2 – Industry & Regional Profile

Next, I would like to ask about the industry or industries your firm is most connected to.

5. What industry or industries best describes what your firm is involved in? [DO NOT READ, ALLOW MORE THAN ONE RESPONSE]

35.0% Food & Beverage, Dining or Restaurants
27.1% Hospitality
17.7% Hotels, Accommodations or Lodging
15.8% Recreation
10.8% Attractions and/or Entertainment
6.9% Health and Fitness
5.9% Tourism
3.9% Events or Conferences
3.0% Visitor or Travel Services
1.5% Education
8.4% Other
0.5% Don’t know/Refused

6. Are your tourist customers primarily local - within San Diego County, regional - within Southern California, Statewide – within California, national – within the Country, or international - outside the Country? [ALLOW MULTIPLE RESPONSES]

63.5% Local – within San Diego County but outside the specific community
29.6% Regional – Within Southern California
27.1% Statewide – Within California
Tourism

39.9% National – Within the United States
31.0% International – Outside the United States
2.5% Don't know/Refused

SECTION 3 – Business & Workforce Climate

Next I want to ask about San Diego County as a place to do business for firms that are involved in the region’s tourism industry.

7. Is your company satisfied, dissatisfied, or neither satisfied nor dissatisfied with San Diego County’s: ______________? (GET ANSWER AND THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

<table>
<thead>
<tr>
<th></th>
<th>Very sat</th>
<th>Somewhat sat</th>
<th>Neither sat nor dissat</th>
<th>Somewhat dissat</th>
<th>Very dissat</th>
<th>(DON’T READ) Don’t know/Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Ability to recruit workers that can speak Spanish or other non-English languages</td>
<td>45.8%</td>
<td>29.6%</td>
<td>13.8%</td>
<td>5.4%</td>
<td>1.5%</td>
<td>3.9%</td>
</tr>
<tr>
<td>B. Ability to retain valued employees over time</td>
<td>38.9%</td>
<td>39.4%</td>
<td>9.4%</td>
<td>5.9%</td>
<td>1.5%</td>
<td>4.9%</td>
</tr>
<tr>
<td>C. Education and training institutions that help develop qualified workers</td>
<td>26.1%</td>
<td>29.1%</td>
<td>22.7%</td>
<td>9.9%</td>
<td>2.5%</td>
<td>9.9%</td>
</tr>
<tr>
<td>D. Ability to recruit workers that have strong customer service skills</td>
<td>36.9%</td>
<td>40.9%</td>
<td>8.9%</td>
<td>7.4%</td>
<td>3.4%</td>
<td>2.5%</td>
</tr>
<tr>
<td>E. Ability to recruit workers that are comfortable working with customers from different cultures</td>
<td>49.3%</td>
<td>31.0%</td>
<td>9.4%</td>
<td>5.9%</td>
<td>0%</td>
<td>4.4%</td>
</tr>
</tbody>
</table>

***Don’t know/Refused Excluded***

<table>
<thead>
<tr>
<th></th>
<th>Very satisfied</th>
<th>Somewhat satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Somewhat dissatisfied</th>
<th>Very dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Ability to recruit workers that can speak Spanish or other non-English languages</td>
<td>47.7%</td>
<td>30.8%</td>
<td>14.4%</td>
<td>5.6%</td>
<td>1.5%</td>
</tr>
<tr>
<td>B. Ability to retain valued employees over time</td>
<td>40.9%</td>
<td>41.5%</td>
<td>9.8%</td>
<td>6.2%</td>
<td>1.6%</td>
</tr>
<tr>
<td>C. Education and training institutions that help develop qualified workers</td>
<td>29.0%</td>
<td>32.2%</td>
<td>25.1%</td>
<td>10.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>D. Ability to recruit workers that have strong customer service skills</td>
<td>37.9%</td>
<td>41.9%</td>
<td>9.1%</td>
<td>7.6%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>
E. Ability to recruit workers that are comfortable working with customers from different cultures

| Percentage | 51.5% | 32.5% | 9.8% | 6.2% | 0.0% |

SECTION 4 – General Hiring Challenges & Occupational Assessment

Now, I would like to ask questions about employment and hiring entry-level people for your current location.

8. Thinking about people that work at your current location, how much difficulty does your company have finding qualified ENTRY-LEVEL applicants who meet the organization’s hiring standards?
   
   - 40.4% Little to no difficulty
   - 38.4% Some difficulty
   - 16.3% Great difficulty
   - 4.9% Don’t know/Refused

9. Are there any specific entry-level occupations that you are having or expect to have difficulty finding qualified applicants for? [ALLOW UP TO 2 RESPONSES] (n=89)
   
   - 21.3% Chefs and cooks
   - 20.2% Housekeeping
   - 11.2% Servers
   - 10.2% Front Desk Agent/Receptionist
   - 7.9% Recreation Leaders and Recreation Aides
   - 7.9% Cashiers
   - 6.7% Attendant/Host
   - 5.6% Kitchen Staff
   - 3.4% Engineer
   - 2.2% Sales representative/customer service positions
   - 2.2% Personal Trainers
   - 2.2% Drivers
   - 2.2% Managers/administration positions
   - 20.2% Other

IF Q9 IDENTIFIES ANY OCCUPATIONS ASK Q10 OTHERWISE SKIP

10. What are the primary difficulties you are having or expect to have in finding qualified applicants for [RESPONSE TO Q9]? [REPEAT IF 2 RESPONSES IN Q9]

   Q9 Occupation 1 (n=93)
64.5% Applicants do not have appropriate skills
61.3% Too few applicants
41.9% Applicants do not have appropriate training or education
4.3% Applicants want a higher salary
3.2% Applicants do not have the required experience

Q9 Occupation 2 (n=32)

68.8% Applicants do not have appropriate skills
62.5% Too few applicants
37.5% Applicants do not have appropriate training or education
12.5% Other
6.3% Applicants lack transportation means
3.1% Don’t know/Refused

11. What are the main entry-level positions at your location with the most employment? [IF NEEDED: These would be up to two entry-level occupations that you expect to employ most of at your current location. RECORD UP TO TWO AND TRY AND SEE IF YOU CAN FIT INTO A PRECODE]

34.5% Customer service positions in food and beverage
26.1% Customer service positions, not in food and beverage
24.1% Janitors, maids and other cleaning positions
17.2% Cashiers, attendants or entry-level sales position
17.2% Food preparation and cooks, entry-level
10.3% Office and administrative positions, entry-level
3.9% Recreation aides/leaders/coaches
2.0% Drivers
4.4% None, we do not hire entry-level positions
4.4% Other

[IDENTIFY FOR ENTRY-LEVEL QUESTIONS: Q12 – Q13]

Entry level position #1 – First response from Q11
Entry level position #2 – Second response from Q11

Now I would like to ask you about the importance of different skills and background for applicants for each of the primary entry-level occupations.

REPEAT Q12 FOR EACH OF THE ENTRY-LEVEL POSITIONS
12. For each of the following technical skills, please tell me if you feel it is very important for applicants of [ENTRY LEVEL POSITION #1]? [CHECK ALL THAT APPLY]

Customer service positions, not in food and beverage (n=53)

98.1% Ability to speak English and be understood easily
84.9% Ability to use & learn new technologies, including computer & software applications
81.1% Ability to write effectively in English
71.7% Ability to sell products and services they are knowledgeable of
62.3% Ability to do basic math up to Algebra, quickly and effectively
43.4% Ability to speak and be understood easily in a language other than English
12.1% Knowledge about the company’s operations and products
1.9% Ability to serve the customer appropriately

Customer service positions in food and beverage (n=68)

91.2% Ability to speak English and be understood easily
83.8% Ability to sell products and services they are knowledgeable of
72.1% Ability to use & learn new technologies, including computer & software applications
69.1% Ability to write effectively in English
57.4% Ability to do basic math up to Algebra, quickly and effectively
29.4% Ability to speak and be understood easily in a language other than English
5.9% Ability to serve the customer appropriately
7.4% Other
1.5% Don’t know/Refused

Office and administrative positions, entry-level (n=21)

100.0% Ability to speak English and be understood easily
95.2% Ability to write effectively in English
90.5% Ability to use & learn new technologies, including computer & software applications
81.0% Ability to do basic math up to Algebra, quickly and effectively
57.1% Ability to sell products and services they are knowledgeable of
47.6% Ability to speak and be understood easily in a language other than English
9.5% Knowledge about the company’s operations and products
4.8% Ability to serve the customer appropriately
9.5% Other

Cashiers, attendants or entry-level sales position (n=35)

88.9% Ability to speak English and be understood easily
75.0%  Ability to use & learn new technologies, including computer & software applications
75.0%  Ability to sell products and services they are knowledgeable of
69.4%  Ability to write effectively in English
66.7%  Ability to do basic math up to Algebra, quickly and effectively
41.7%  Ability to speak and be understood easily in a language other than English
5.6%  Ability to serve the customer appropriately

Food preparation and cooks, entry-level (n=35)

80.0%  Ability to speak English and be understood easily
48.6%  Ability to write effectively in English
45.7%  Ability to speak and be understood easily in a language other than English
37.1%  Ability to do basic math up to Algebra, quickly and effectively
37.1%  Ability to use & learn new technologies, including computer & software applications
37.1%  Ability to sell products and services they are knowledgeable of
2.9%  Ability to serve the customer appropriately
5.7%  Other
2.9%  Don’t know/Refused

Janitors, maids and other cleaning positions (n=52)

71.2%  Ability to speak English and be understood easily
46.2%  Ability to speak and be understood easily in a language other than English
34.6%  Ability to write effectively in English
28.8%  Ability to use & learn new technologies, including computer & software applications
19.2%  Ability to do basic math up to Algebra, quickly and effectively
9.6%  Ability to sell products and services they are knowledgeable of
3.8%  Knowledge about the company’s operations and products
13.5%  Other
7.7%  Don’t know/Refused

Other - Important technical skills (n=24)

95.8%  Ability to speak English and be understood easily
79.2%  Ability to write effectively in English
62.5%  Ability to do basic math up to Algebra, quickly and effectively
58.3%  Ability to use & learn new technologies, including computer & software applications
54.2%  Ability to sell products and services they are knowledgeable of
29.2%  Ability to speak and be understood easily in a language other than English
4.2%  Ability to serve the customer appropriately
4.2% Other

13. What are the positions or occupational titles that successful [ENTRY LEVEL POSITION #1] can progress into at your company?

Customer service positions, not in food and beverage (n=53)

- 34.0% Manager
- 20.8% Supervisor
- 7.5% Recreation leader/coordinator
- 5.7% Front desk agent
- 3.8% Visitor services associate
- 3.8% Service representative lead
- 3.8% Customer service, sales and marketing lead
- 3.8% Accountant/administrative position
- 1.9% Director
- 1.9% Organizer
- 7.5% Other
- 5.7% None

Customer service positions in food and beverage (n=68)

- 60.3% Manager
- 25.0% Supervisor
- 19.1% Server/attendant
- 10.3% Team leader/assistant
- 8.8% Chef/cook
- 4.4% Director
- 2.9% Cashier
- 1.5% Park ranger
- 1.5% Teacher
- 1.5% Marketing specialist
- 1.5% Market president
- 5.9% Other
- 8.8% None

Office and administrative positions, entry-level (n=21)
28.6% Manager
14.3% Supervisor
14.3% Front desk positions
9.5% Recreation leader
9.5% Director
4.8% Researcher
4.8% Marketing position
4.8% Accountant
4.8% Other
4.8% None

Cashiers, attendants or entry-level sales position (n=34)
58.8% Manager
23.5% Team trainer/leader
14.7% Supervisor
8.8% Server/attendant
2.9% Park ranger
2.9% Sales position
5.9% None
5.9% Don't know/Refused

Food preparation and cooks, entry-level (n=35)
51.4% Manager
40.0% Cook, chef, or sous chef
20.0% Team leader
11.4% Supervisor
5.7% Cashier
2.9% Trainer
8.6% None
2.9% DK/NA

Janitors, maids and other cleaning positions (n=47)
57.4% Supervisor
38.3% Manager
12.8% Team or department lead
12.8% Attendant/server
8.5% Front office/desk agent
6.4% Inspector
4.3% Office assistant
2.1% Director or assistant director
2.1% Sales positions
2.1% Chefs/cooks
2.1% President
6.4% None

“Other” Positions (n=24)

33.3% Recreation specialists, instructor, or coordinator
20.8% Managers
8.3% Develop their own business
4.2% Maintenance supervisor
33.3% Other
12.5% None

Now, I would like to ask questions about employment and hiring for non-entry-level people for your current location.

14. Thinking about people that work at your current location, how much difficulty does your company have finding qualified NON-ENTRY-LEVEL applicants who meet the organization’s hiring standards?

34.5% Little to no difficulty
36.0% Some difficulty
13.3% Great difficulty
16.6% Don’t know/Refused

15. Are there any specific non-entry-level occupations that you are having or expect to have difficulty finding qualified applicants for? [ALLOW UP TO 2 RESPONSES] (n=60)

28.3% Manager
16.7% Kitchen staff
13.3% Supervisor
13.3% Sales manager
6.7% Director/Department head
5.0% Housekeeping positions
5.0% Engineer
3.3% Recreation instructor/specialist
3.3% Mechanic
3.3% Accountant
3.3% Shift leader
3.3% Teacher/Educator
3.3% Technician
3.3% Server
16.7% Other
5.0% None

IF Q15 IDENTIFIES ANY OCCUPATIONS ASK Q16 OTHERWISE SKIP

16. Thinking of your non-entry-level positions, how often do you promote from within? (n=62)

40.3% Usually (70% of the time or more)
45.2% Frequently (31% to 69% of the time)
12.9% Seldom (1% to 30% of the time)
1.6% Never

17. What are the main non-entry-level occupations at your location with the most employment? [IF NEEDED: These would be up to two non-entry-level occupations that you expect to employ most of at your current location. RECORD UP TO TWO AND TRY AND SEE IF YOU CAN FIT INTO A PRECODE]

47.3% Management positions, including supervisors & store managers
29.1% Customer relations positions
14.8% Office and administrative positions, non-entry-level
6.9% Finance and accounting positions
3.4% Kitchen staff
2.0% Human resource positions
2.0% Technicians
2.0% Teachers/Instructors
1.5% Sales positions
1.5% Servers/Bartenders
4.9% Other
8.9% Don’t know/Refused
Now I would like to ask you about the importance of different skills and background for applicants for each of the primary non-entry-level positions.

Next I want to ask about your experience and hiring expectations with these occupations.

18. Please indicate whether you have any difficulties finding qualified applicants for [Non-Entry level position #1] who meet the organization’s hiring standards for any of the following categories: (Select all that apply)

Customer Service Positions (n=59)

44.1% Relevant industry experience
44.1% Management skills
40.7% Appropriate training or education
39.0% Social and communication skills
37.3% Technical skills specific to the position or industry
10.2% Industry-specific credentials*
3.4% Work ethics/Reliability
3.4% Other
16.9% Don’t know/Refused

* Industry-specific credentials reported by respondents include emergency responder, food preparation, Class C driver’s license, property management and brand training, previous experience, and pop culture knowledge.

Finance and accounting positions (n=14)

71.4% Relevant industry experience
28.6% Social and communication skills
28.6% Appropriate training or education
21.4% Technical skills specific to the position or industry
21.4% Management skills
14.3% Industry-specific credentials*

* Two respondents reported property management systems as a specific Industry-specific credential.
Office and administrative positions, non-entry-level (n=29)

- 37.9% Appropriate training or education
- 27.6% Management skills
- 24.1% Relevant industry experience
- 24.1% Technical skills specific to the position or industry
- 17.2% Social and communication skills
- 3.4% Industry-specific credentials
- 41.4% Don’t know/Refused

Management positions, including supervisors & store managers (n=96)

- 40.6% Management skills
- 31.3% Technical skills specific to the position or industry
- 28.1% Relevant industry experience
- 26.0% Appropriate training or education
- 21.9% Social and communication skills
- 11.5% Industry-specific credentials*
  - 1.0% None
  - 1.0% Other
- 37.5% Don’t know/Refused

*Industry-specific credentials include previous hospitality and property management experience, PGA certification, CPR and first aid, food handlers certification, personal training certification, captain license, and project management professional certification.

Human resource positions (n=4)

- 50.0% Technical skills specific to the position or industry
- 25.0% Spanish language skills
- 50.0% Don’t know/Refused

Other Positions (n=31)

- 41.9% Appropriate training or education
- 38.7% Technical skills specific to the position or industry
- 38.7% Social and communication skills
- 32.3% Relevant industry experience
- 29.0% Management skills
- 12.9% Industry-specific credentials*
25.8% Don't know/Refused

* Including HVAC certification and experience working in resorts, captain’s license and boat building degree, and Class C or B driver’s license.

19. Do any of the positions that you currently employ at your location, regularly receive cash tips or gratuities, if yes, can you identify the occupations?

60.1% No, none of the occupations at this location regularly receive cash tips or gratuities
38.9% Yes
1.0% Don't know/Refused

[IF Q19="Yes", ASK Q20 FOR EACH OCCUPATION NOTED IN Q17 OTHERWISE SKIP]

20. Approximately, what proportion of _[OCCUPATION TITLE FROM Q17]_ total compensation comes from cash tips or gratuities?

Q17 Occupation 1

35.8% Small, 10 percent or less of total compensation
12.3% Significant, Over 10 percent but less than half of total compensation
22.2% Half or more, 50 percent of more of total compensation
22.2% It varies too much to consistently fall into one of these categories
7.4% Don't know/Refused

Q17 Occupation 2

36.4% Small, 10 percent or less of total compensation
16.4% Significant, Over 10 percent but less than half of total compensation
16.4% Half or more, 50 percent of more of total compensation
20.0% It varies too much to consistently fall into one of these categories
10.9% Don't know/Refused

Q17 Occupation 3

41.4% Small, 10 percent or less of total compensation
17.2% Significant, Over 10 percent but less than half of total compensation
20.7% Half or more, 50 percent of more of total compensation
13.8% It varies too much to consistently fall into one of these categories
Now I would like to ask a few brief questions on developing your current employees.

21. Lastly, are you interested in learning more about the following employer services provided by the San Diego Workforce Partnership?

As I read each of the following services, please tell me whether your organization would have no interest, some interest, or great interest.

<table>
<thead>
<tr>
<th>Service</th>
<th>No interest</th>
<th>Some interest</th>
<th>Great interest</th>
<th>Don’t know/Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Funds to reimburse wages or the cost of training new hires</td>
<td>46.3%</td>
<td>28.1%</td>
<td>18.2%</td>
<td>7.4%</td>
</tr>
<tr>
<td>B. Funds to train current workers to be promoted within your company</td>
<td>48.3%</td>
<td>31.0%</td>
<td>15.3%</td>
<td>5.4%</td>
</tr>
<tr>
<td>C. Non-traditional recruitment events (e.g. hiring at happy hour)</td>
<td>60.1%</td>
<td>24.6%</td>
<td>8.9%</td>
<td>6.4%</td>
</tr>
<tr>
<td>D. Develop an apprenticeship-type program for your future employees</td>
<td>62.1%</td>
<td>23.2%</td>
<td>9.4%</td>
<td>5.4%</td>
</tr>
<tr>
<td>E. Develop an apprenticeship-type program for your future employees</td>
<td>53.7%</td>
<td>29.1%</td>
<td>11.8%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

***Don’t know/Refused Excluded***

<table>
<thead>
<tr>
<th>Service</th>
<th>No interest</th>
<th>Some interest</th>
<th>Great interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Funds to reimburse wages or the cost of training new hires</td>
<td>50.0%</td>
<td>30.3%</td>
<td>19.7%</td>
</tr>
<tr>
<td>B. Funds to train current workers to be promoted within your company</td>
<td>51.0%</td>
<td>32.8%</td>
<td>16.1%</td>
</tr>
<tr>
<td>C. Non-traditional recruitment events (e.g. hiring at happy hour)</td>
<td>64.2%</td>
<td>26.3%</td>
<td>9.5%</td>
</tr>
<tr>
<td>D. Develop an apprenticeship-type program for your future employees</td>
<td>65.6%</td>
<td>24.5%</td>
<td>9.9%</td>
</tr>
<tr>
<td>E. Develop an apprenticeship-type program for your future employees</td>
<td>56.8%</td>
<td>30.7%</td>
<td>12.5%</td>
</tr>
</tbody>
</table>

Before we finish, I’d like to ask you a general question and verify your contact information.

22. Are you interested in receiving information from the San Diego Workforce Partnership, including the findings of this research and how to stay engaged in the Partnership’s planning to prepare qualified, productive workers for our regional tourism economy?
52.2% Yes
46.8% No
1.0% Don't know/ Refused
ACKNOWLEDGMENTS

This report resulted from a regional collaboration in San Diego County. The San Diego Workforce Partnership (SDWP) would like to acknowledge the advisory group and representatives from companies, initiatives and programs in San Diego County who participated in surveys, interviews and focus groups for this report. This study could not have been produced without their support.

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