Hospitality and Tourism in the New Orleans Region:

A Labor Market Snapshot

By Tiffany L. Smith

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ACKNOWLEDGEMENTS

ABOUT THE AUTHOR

Tiffany L. Smith is a director at JFF, where she leads the labor market information practice, delivering workforce development solutions to improve the employment success of JFF target populations. Previously, Ms. Smith served as a senior policy advisor with the U.S. Department of Labor's Employment and Training Administration, where she focused on the implementation of data- and performance-related aspects of the Workforce Innovation and Opportunity Act. She also spent eight years at the New Jersey Department of Labor and Workforce Development where her last role was Director of Workforce Research & Analytics, overseeing the workforce longitudinal data system, analysis of labor market data, workforce program performance, and evaluations of program outcomes in support of the state's talent development efforts. With over 20 years' experience in policy, research, and evaluation Ms. Smith has also worked in postsecondary education research and policy.

TABLE OF CONTENTS

INTRODUCTION

New Orleans is known worldwide for its spirited nightlife, unique cuisine, and rich cultural heritage, all of which draw more than 17 million people to visit the city each year.[1] So it's no surprise that the hospitality and tourism industry is a significant part of the economy of the greater New Orleans region.[2]

The industry employs 12 percent of all regional workers and 20 percent of all workers in the city. Strong employment growth is projected for the next decade.[3]

Conventional wisdom about career opportunities in hospitality and tourism often focuses on the large proportion of employees in entry-level, low-skill positions, low wages, and perceived limited advancement. Indeed, a majority of jobs in the New Orleans regional hospitality and tourism industry are entry-level and low-skill. However, with low barriers to entry and quick onboarding, entry-level jobs in this industry can be good places to develop general employability skills that are in demand across multiple occupations and industries. What must be avoided is for these jobs to become dead-end positions with persistently low pay.

This publication is a labor market snapshot that moves beyond the conventional wisdom to take a closer look at the full range of jobs available, the types of skills required, and the prospects for economic advancement both within and outside the industry. Our analysis uses an approach that aligns with unique features of the hospitality and tourism industry in order to better understand its potential economic opportunities.

Specifically, we zero in on the low barriers to entry and the significant role of on-the-job-training. These characteristics enable jobseekers with no formal education or work experience to gain employment, learn valuable skills, and accumulate experience that can help them move toward progressively higher-paying, higher-skill positions.

New Orleans has a large untapped workforce of unemployed and underemployed residents who would benefit from these opportunities and contribute to regional economic growth—if the industry takes key steps. It is up to employers, in collaboration with other stakeholders, to make the most of this potential.

Key Findings

Our analysis identifies potential economic opportunities in a previously overlooked part of the hospitality and tourism industry's occupational landscape—thousands of jobs that require higher skills and offer greater pay than low-skill, entry-level work. Although these positions do not require formal education beyond high school, they do require significant on-the-job training, making many of them, depending on wage levels, this industry's version of what we would characterize as middle-skill jobs in other industries. They are potential stepping stones to higher-skill, higher-pay opportunities. For the purposes of this snapshot, we call them "experience-based skill jobs."

The snapshot's key findings include:

- Experience-based skill jobs represent about 1 in 10 positions in the hospitality and tourism industry in the greater New Orleans region.
- These jobs offer greater potential for individual financial stability and economic mobility than entry-level, low-skill jobs.
- Significant work remains to be done to expand economic advancement for industry employees. Employers must commit to the development of clear, accessible, and structured pathways that enable more workers to progress to experience-based and middle-skill jobs and on to higher-skill, family-supporting careers—both within and outside the industry.

The rest of this snapshot explores these findings and recommends specific actions for the industry to take on its own and in close collaboration with other stakeholders to ensure that its workers have realistic, accessible opportunities for career advancement. The report is organized as follows: Part 1 provides an economic overview of the greater New Orleans region. Part 2 examines the subsectors, occupations, and workforce of the region's hospitality and tourism industry. Part 3 describes the characteristics and promise of experience-based skill jobs in hospitality and tourism in the New Orleans region. Part 4 concludes the paper with recommendations for employers and other stakeholders. The appendices provide supplemental information, including examples of career pathways that may move entry-level workers to progressively higher-skill, higher-wage jobs.

PART 1

ECONOMIC OVERVIEW OF NEW ORLEANS REGION

This section provides an economic overview of the New Orleans region. It offers important context for the analysis of the hospitality and tourism industry that follows. Although the snapshot focuses on the region, some data is offered for the city as well, because of the industry's high concentration in the city. (*Additional city data is in Appendix C.*)

New Orleans is a Diverse Place to Live and Work[4]

The greater New Orleans region is home to a racially and ethnically diverse population of nearly 1.5 million people. More than half of residents are white while about one-third are African American, and eight percent are Hispanic or Latino.

Population[5]

The region is divided into 10 geographic areas known as "parishes," which are the equivalent to what most other states call "counties." They vary dramatically in size. The smallest parishes (Plaquemines and St. James) have less than 25,000 residents, while Orleans parish (which encompasses the entire city of New Orleans) has about 400,000.

Income and poverty[6]

Compared to the rest of the United States, income is low, and poverty is high. In the city of New Orleans, median household income is $37,488—far below the state median of $45,652 and the national median of $55,322.

Poverty patterns are consistent with income levels. About 26 percent of New Orleans city residents live below the poverty level—far more than the state poverty rate of 19.7 percent and the national rate of 15 percent.

Educational attainment[7]

The educational attainment of regional residents is slightly lower than in the rest of the country.
- Nearly half of the region's population has a high school diploma or less.
- About one quarter of the region's residents has some college education, while just over a quarter (27 percent) has at least a bachelor's degree.

Opportunity youth[8]

The New Orleans metropolitan area has a relatively high proportion of opportunity youth— young people ages 16 to 24 who are not in school and not working.

- There are estimated to be 26,000 opportunity youth in the New Orleans metropolitan statistical area.
- This is over 18 percent of all young people in the age range, compared to 14 percent nationally.

Employment is Growing in the Region

Jobs and job growth[9]

Job growth has been moderate in the greater New Orleans region, though projected growth is lower than national projections.

- In 2017, the 10-parish region had almost 597,000 jobs, a number projected to grow about 6 percent over the next decade, compared with 10 percent nationally.
- By 2027, projections indicate there will be over 632,000 jobs in the region.

Recovery from Hurricane Katrina[10]

In 2015, ten years after Hurricane Katrina, data showed that the area was sustaining a recovery and diversifying the types of industries contributing to the economy.

- By 2014, jobs in the metropolitan area had regained losses that occurred during the recession of the late 2000s.
- Industries with notable growth post Katrina included water management, video production, and electric power generation.

Unemployment and labor force participation

Unemployment is higher in the New Orleans region than in the country as a whole, while labor force participation is lower. [11]

- About 39,000 residents of the New Orleans region were unemployed in July 2018; this includes more than 11,300 unemployed people in the city.[12]
- Regional labor force participation was 57 percent in May 2018. This is lower than the national labor force participation rate, which was 60.8 percent in 2017.[13]

Workforce composition[14]

The region has a diverse workforce in terms of age and race/ethnicity.

- The age distribution of the workforce is generally similar to national patterns (*see Figure C1 in Appendix C*).
- While the majority of workers (about 53 percent) are white, more than one third (34 percent) are African American (*see Figure C2 in Appendix C*).

Most Residents Live and Work in the Same Area[15]

The New Orleans region provides employment opportunities for local residents as well as for residents outside the region (*see Figure 1*).

- Of the more than 550,000 people employed in the 10-parish region in 2015, just 17 percent (95,000) lived outside the region.
- A majority of people (85 percent) who live in the region also work in the region, numbering over 460,000.

FIGURE 1. WORKER FLOWS IN AND OUT OF THE GREATER NEW ORLEANS REGION
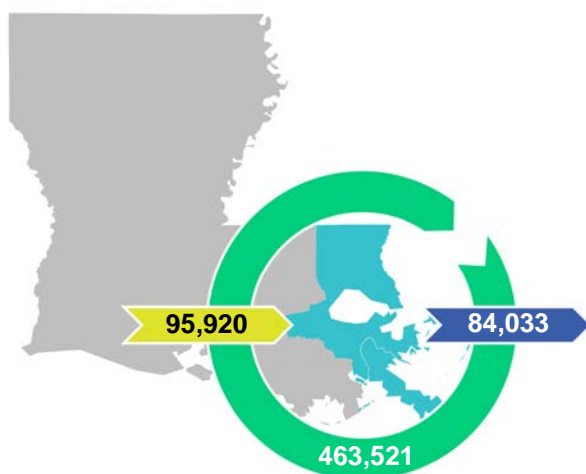
Accommodation and Food Services a Top Employer in the Region[16]

The accommodation and food services industry, which includes many, but not all, of the hospitality and tourism subsectors defined in this report, is a top employer in the New Orleans region. Strong growth is projected over the next decade.

- Accommodation and food services jobs are projected to grow at a clip of 11 percent between 2017 and 2027.[17]
- It is anticipated that it will also remain the second largest industry in the region through 2027 (*see Table C1 in Appendix C*).

More than half of all employment in the New Orleans region is in accommodation and food services and three other industries. The top employing regional industries are:

- Government (14%)

- Accommodation and food services (14%)
- Health care and social assistance (13%)
- Retail trade (12%)

These industries have some overlap with priority clusters identified by local economic development organizations (*see "Priority industries in the region"*).

PRIORITY INDUSTRIES IN THE REGION

The industries highlighted above are the top employers in New Orleans and the region. However, other industries are also of interest to regional economic and workforce development organizations.

Greater New Orleans, Inc., an important regional economic development alliance, has six target industries: advanced manufacturing, energy, international trade, digital media, biosciences, and environmental management. These industries were chosen based on their potential for growth, factoring in "naturally competitive assets and strengths, sector projections, global market trends, and community goals."[18] (The 10-parish region in this report was selected because it is parallel to GNO, Inc.'s region of focus.)

The New Orleans Business Alliance, the official economic development agency for the City of New Orleans, focuses its work on the city alone. Known by the acronym "NOLABA," the alliance has five areas of focus: bio-innovation and health service; creative digital media; sustainable industries; transportation, trade & logistics; and retail.[19]

GNO, Inc. and NOLABA also partner with the hospitality industry in business development and asset development opportunities. As discussed in detail below, because there are fewer high-skill, high-pay jobs in the hospitality and tourism industry than entry-level and low-skill positions, it is important that organizations like GNO, Inc. and NOLABA work with industry employers, as well as with education and workforce development systems, to ensure there are career advancement opportunities for all hospitality workers, even if it means transitioning to other growth industries with more opportunities for advancement. The analysis in this report can be used together with the work of organizations such as GNO, Inc. and NOLABA to target ways to expand opportunities for hospitality workers in other industries.

PART 2

ZEROING IN ON HOSPITALITY AND TOURISM IN GREATER NEW ORLEANS

This section provides an overview of the hospitality and tourism industry (as defined in this analysis) in the greater New Orleans region.[20] It highlights subsectors, occupations, worker demographics, and job qualifications.

Hospitality and Tourism Industry Projects Strong Growth Over Decade[21]

About 12 percent of the 597,000 jobs in the region and 20 percent of the 200,000 jobs in the city are in the hospitality and tourism industry (*see Table 1*).

- That amounts to more than 73,000 hospitality and tourism positions in the region, including 39,400 in the city alone.
- The industry is expected to experience strong regional growth of 11 percent through 2027, driven largely by projected growth of 16 percent in the city.
- By 2027, nearly 8,400 new hospitality and tourism jobs are projected for the region, including 6,400 in the city.

TABLE 1. OVERVIEW OF HOSPITALITY AND TOURISM EMPLOYMENT, GREATER NEW ORLEANS REGION AND THE CITY OF NEW ORLEANS

Geographic Area	2017 % of Total Employment	2017 Jobs	2027 Jobs	10-Year Change	
				Number	Percent
Greater New Orleans Region	12%	73,237	81,601	8,364	11%
City of New Orleans	20%	39,402	45,821	6,419	16%

Source: Emsi 2018 Q3

Full-Service Restaurants and Hotels Drive Hospitality and Tourism in the Region

Overall, the regional hospitality and tourism industry is composed of 42 subsectors, including restaurants, bars, hotels, casinos, and caterers (*see Table 2 for top subsectors by employment; see Appendix B for complete list of subsectors*).

- Most jobs (60 percent) are in just two subsectors: full-service restaurants (43 percent) and hotels (17 percent).
- Four of the 10 largest subsectors in the region are projected to expand employment by 27 percent or more by 2027: food service contractors, snack and nonalcoholic beverage bars, casino hotels, and caterers.

TABLE 2. TOP HOSPITALITY AND TOURISM SUBSECTORS BY EMPLOYMENT, GREATER NEW ORLEANS REGION

Industry	2017 % of Industry	2017 Jobs	2027 Jobs	10-Year Change	
				Number	Percent
Full-Service Restaurants	43%	31,139	34,924	3,785	12%
Hotels (except Casino Hotels) and Motels	17%	12,790	13,323	533	4%
Drinking Places (Alcoholic Beverages)	6%	4,311	4,108	(203)	-5%
Food Service Contractors	5%	3,574	4,898	1,324	37%
Snack and Nonalcoholic Beverage Bars	5%	3,498	4,488	990	28%
Fitness and Recreational Sports Centers	4%	2,944	3,168	224	8%
Casino Hotels	3%	2,124	2,708	584	27%
Caterers	2%	1,278	1,706	428	33%
Casinos (except Casino Hotels)	2%	1,213	776	(437)	-36%
Gift, Novelty, and Souvenir Stores	2%	1,103	910	(193)	-17%

Regional Staffing Patterns Reflect Dominance of Full-Service Restaurants and Hotels

Far more people in the regional hospitality and tourism industry work as wait staff—almost 15,000 people—than in any other position (*see Table 3*).

- One in five jobs (20 percent) in the hospitality and tourism industry is as a waiter or waitress. These jobs are expected to grow by 11 percent by 2027.
- Together, the top six occupations in Table 3 comprise 50 percent of the industry.
- All of the occupations in Table 3 are projected to increase between 2017 and 2027 years, though the rates of increase vary.
- Few of the top occupations have a median wage of more than $10 per hour, which is consistent with the low level of education required for the positions. In fact, all top six earn roughly between $9 or $10 per hour.

TABLE 3. TOP OCCUPATIONS IN HOSPITALITY AND TOURISM INDUSTRY BY EMPLOYMENT, GREATER NEW ORLEANS REGION

Occupation	2017 % of Industry	2017 Jobs	2027 Jobs	10-Year Change		2017 Median wage
				Number	Percent	
Waiters and Waitresses	20%	14,900	16,593	1,693	11%	$8.81
Cooks, Restaurant	9%	6,721	7,769	1,048	16%	$10.42
Food Preparation Workers	7%	4,780	5,324	544	11%	$8.84
Bartenders	6%	4,359	4,543	184	4%	$9.10
Maids and Housekeeping Cleaners	5%	3,776	4,005	229	6%	$9.95
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	4%	2,854	3,135	281	10%	$9.13

Occupation	2017 % of Industry	2017 Jobs	2027 Jobs	10-Year Change		2017 Median wage
				Number	Percent	
Dishwashers	3%	2,447	2,695	248	10%	$9.05
First-Line Supervisors of Food Preparation and Serving Workers	3%	2,394	2,726	332	14%	$14.87
Cashiers	3%	2,320	2,373	53	2%	$8.90
Combined Food Preparation and Serving Workers, Including Fast Food	3%	1,966	2,759	793	40%	$8.98
Dining Room and Cafeteria Attendants and Bartender Helpers	2%	1,679	1,906	227	14%	$9.69
Maintenance and Repair Workers, General	2%	1,390	1,498	108	8%	$17.29
Hotel, Motel, and Resort Desk Clerks	2%	1,189	1,280	91	8%	$10.99
Cooks, Short Order	1%	997	1,000	3	0%	$10.12

THE ROLE OF TIPS IN EARNINGS

In an industry dominated by restaurants and bars, where one in four employees is a waiter, waitress, or bartender, tips are a fundamental part of the compensation structure. Tips can be a substantial source of income for workers and can contribute to the appeal of the hospitality and tourism industry in the New Orleans region. They can affect the way workers think about career advancement, especially in cases where promotion from a tipped position can lead to a non-tipped one. However, tips are also highly variable and can lower guaranteed hourly wages.

Cash tips are not easy to track, so complete data about tip income is not available. (The IRS estimates 40 percent of cash tips are unreported, or about $11 billion.) But the IRS and U.S. Bureau of Labor Statistics do track tips paid by credit card. Analysis of credit card data show that the national median hourly wage including tips paid by credit card is $9.61 for food service positions and $9.50 for bartenders.[22]

Louisiana is among the highest tipping states in the country, and the median hourly wage including tips for serving-related occupations in New Orleans is slightly higher than the national rate, at $9.87. To account for lower tips and lower total income during the off season, state law requires employers to compensate workers if their earnings fall below the federal minimum wage of $7.25 an hour.

Hospitality and Tourism Workforce is Relatively Young[23]

There is strong evidence that the hospitality and tourism industry has many job opportunities for young people just entering the workforce, although many of these jobs are low paid.

- Similar to the national hospitality and tourism workforce, more than half of the industry's workers are under 35 years old in both the city and the region.
- The New Orleans region has about 24 percent of hospitality and tourism workers in the youngest group (ages 14-24).
- This is in stark contrast to overall employment in the region, where just 12 percent of workers are under 25 years old.

Key Hospitality and Tourism Occupations in the Region Differ Substantially by Age and Race[24]

While more than half of the regional hospitality and tourism workforce is under 35 years old, there are stark differences by occupation (*see Figure C1 in Appendix C*).

- In two of the largest occupations—host/hostess and wait staff—close to 80 percent and 70 percent, respectively, are under 35 years old.
- Workers in gaming occupations are the oldest, with just a third under age 35.

Similar to the pattern in the industry as a whole, whites and African Americans are the predominant racial groups across all occupations (*see Figure C2 in Appendix C*).

- Whites are overrepresented among bartenders and wait staff, the two tipped occupations in the analysis. This confirms overall perceptions in the industry that whites are more likely to have these types of positions.[25]
- The proportion of African Americans gaming dealers is high (52 percent) compared to their overall presence in the industry (39 percent).

No Formal Education Required in Many Hospitality and Tourism Occupations

The majority of occupations in hospitality and tourism do not require formal education, as defined by the U.S. Bureau of Labor Statistics (*see Figure 2*).[26]

- Just 4 percent of occupations (about 3,200 positions) in the greater New Orleans region require any education beyond high school.
- About 15,800 positions (22 percent) in the region require no more than a high school diploma or the equivalent.
- The majority of the region's jobs (53,600, or 74 percent) require no educational credential at all.

FIGURE 2. ENTRY-LEVEL EDUCATION REQUIREMENTS, HOSPITALITY AND TOURISM INDUSTRY, GREATER NEW ORLEANS REGION

- No formal educational credential
- High school diploma or equivalent
- Associate's degree, nondegree award, some college
- Bachelor's degree or more
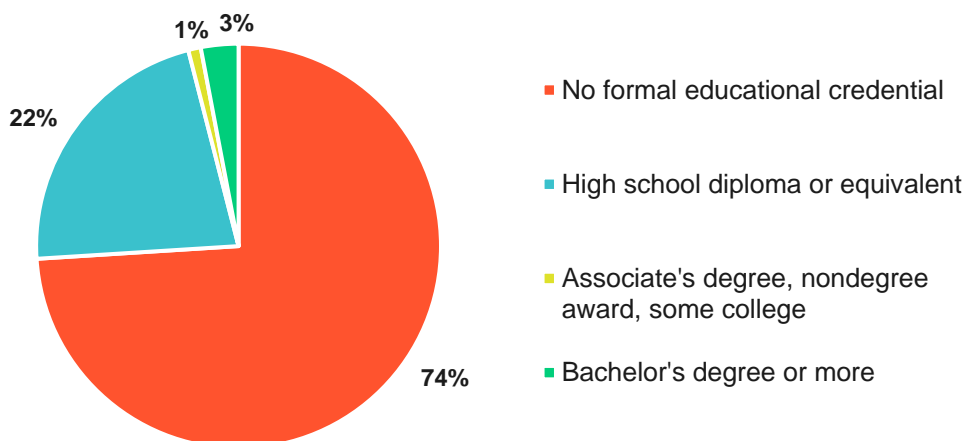
Source: ESMI 2018 Q3

No Experience Necessary in Many Hospitality and Tourism Occupations[27]

Previous work experience is not required for most occupations in the hospitality and tourism industry (*see Figure 3*).

- Nearly 59,000 jobs—81 percent of the total—require no work experience at all.
- Some of the occupations with the largest number of jobs in the industry, including wait staff, bartenders, housekeeping staff, and cashiers, require no previous work experience to be hired.
- Instead, most jobs require some short-term on-the-job training that prepares workers for competency in their position and to ensure they are able to stay employed.

FIGURE 3. AMOUNT OF PREVIOUS WORK EXPERIENCE REQUIRED, HOSPITALITY AND TOURISM INDUSTRY, GREATER NEW ORLEANS REGION
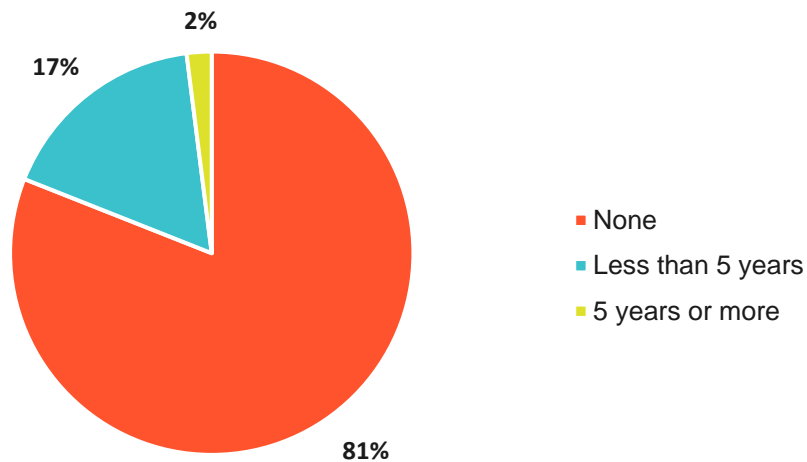
Source: 2018 Q3

On-the-Job Training is Key to Success in Many Hospitality and Tourism Occupations[28]

Although most hospitality and tourism jobs require no formal education or work experience, the majority do require on-the-job training to learn the skills to be competent in the particular occupation. (This does not include learning unique requirements of a specific job or employer.)

- Almost three-quarters of the jobs in the industry—about 53,500 jobs—are in occupations that require less than a month of on-the-job training. This group includes waitstaff, bartenders, hotel clerks, short-order cooks, and security guards.
- The next largest group—about 10,200 jobs—or 14 percent of the industry's employment, require on-the-job training of more than a month but less than a year (moderate-term). The two occupations that comprise most of this category are restaurant cooks and maintenance and repair workers. It also includes tour guides, bookkeeping clerks, and sales representatives.

FIGURE 4. TYPICAL AMOUNT OF ON-THE-JOB TRAINING REQUIRED, HOSPITALITY AND TOURISM INDUSTRY, GREATER NEW ORLEANS REGION

■ No on-the-job training

■ Short-term on-the-job training

■ Moderate-term on-the-job training

■ Long-term on-the-job training
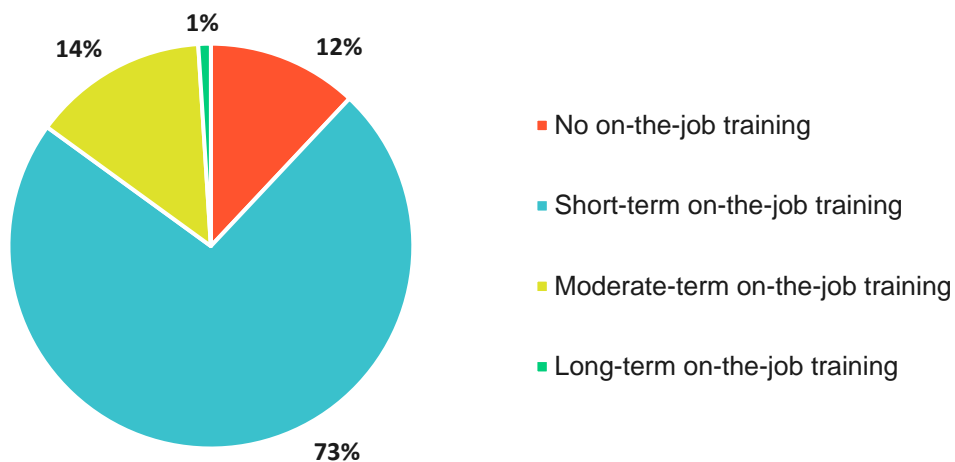
Source: 2018 Q3

PART 3

INTRODUCING THE CATEGORY OF EXPERIENCE-BASED SKILL JOBS IN HOSPITALITY AND TOURISM

Most labor market analyses across industry sectors assess job quality and advancement opportunities by focusing on progression to so-called "middle-skill" jobs. For decades, middle-skill jobs have been viewed as offering strong economic opportunities to millions of workers without a four-year college degree. Low-income Americans who secured such jobs knew that someday they would be able to climb their way out of poverty and into the middle class. So, it's important to take into account the number of middle-skill jobs in the hospitality and tourism industry.

By definition, middle-skill jobs require more education than a high school diploma but less than a bachelor's degree. Typical education programs to prepare for middle-skill jobs include short-term certification or associate's degrees. Middle-skill pay spans a broad range, though a $15-per-hour minimum is common to many analyses. The earnings threshold for middle-skill work in this snapshot is a median wage of $15 per hour (about $31,200 annually for full-time work).

Using the above definition, the proportion of middle-skill positions in the New Orleans region's hospitality and tourism industry is relatively small—just 1 percent, or about 700 jobs. However, according to our analysis, the industry includes an additional category of jobs that has gone unrecognized in most labor market analyses.

Like middle-skill jobs, these also require higher skill levels than low-skilled positions. But training occurs on the job, rather than in school and prior to hiring. These positions—which we've termed "experience-based skill jobs"—make up 11 percent of the industry, or roughly 7,800 jobs in the New Orleans region (*see Figure 5*). Experience-based skill jobs are projected to grow by 12 percent, compared with middle-skill jobs, which are projected to increase just over 2 percent.

FIGURE 5. HOSPITALITY AND TOURISM EMPLOYMENT BY SKILL LEVEL, GREATER NEW ORLEANS REGION

■ Low skill / Low wage
■ Intermediate skill
■ Middle skill
■ High skill
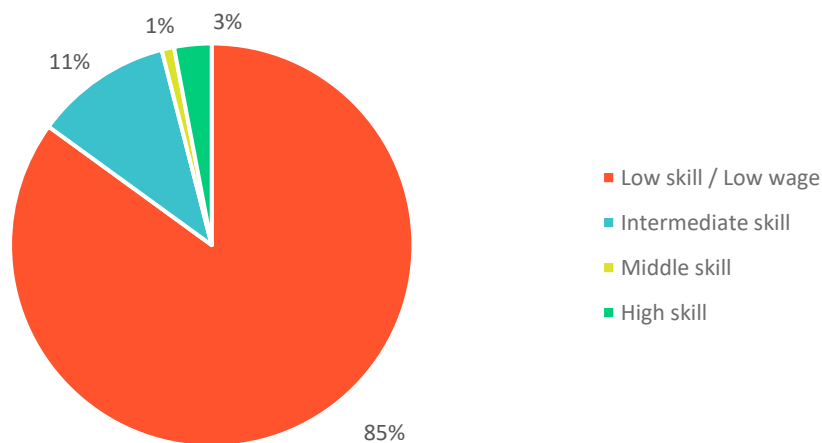
Source: Emsi 2018 Q3

Experience-Based Skill Jobs Deserve Attention

Experience-based skill jobs hold promise because they have low barriers to entry, offer better pay than low-skill work, and their workers do possess valued skills in the industry. These characteristics make them more accessible than middle-skill jobs (which require post-high school formal education) and more valuable than low-skill jobs, especially for people with barriers to education and employment.

By definition, experience-based skill jobs require no formal education beyond a high school diploma or its equivalent. Rather, they involve significant on-the-job training—either moderate-term (defined as one month to less than one year) or long-term (one year or more). While low-skill work can require on-the-job training, as well, it typically lasts less than one month.

Experience-based skill job pay varies by occupation. For identifying these positions, this snapshot, uses an earnings threshold of a median wage of $12 per hour (about $25,000 in annual earnings for full-time work). This is slightly above a living wage for a single adult with no dependents in the New Orleans region, as determined by the MIT Living Wage Calculator (*see "Rationale for Wage Threshold"*).[29] However, many of the jobs identified as having experience-based skills, pay well above the $12 per hour threshold. (For comparison, the poverty line in New Orleans, as determined by the U.S. Census Bureau, is under $13,000 per year for a single adult, and about $17,000 for an adult with one child.[30])

Jobseekers in search of a career pathway can take the first step in a low-skill, entry-level job in hospitality and tourism and then seek experience-based skill opportunities without additional

formal education, whose cost and time requirements are barriers for many from low-income backgrounds. These workers can use the knowledge and skills they gain as on-ramps to career pathways leading to higher-skill and higher-wage jobs, including middle-skill and higher-level experience-based skill opportunities within or outside of the industry (*see career pathway examples in Appendix D*).

Advancement within and beyond experience-based skill jobs in the industry remains a problem. As Figure 6 shows, in hospitality, the number of jobs shrinks dramatically at each higher skill level. While there were 61,700 people employed in low-skill positions in 2017, there were only 7,800 experience-based skill positions. And as noted above, the number of middle-skill jobs was even smaller, at just under 700. In addition to fewer job opportunities at higher levels, it's not always clear how individual jobs lead to higher-level careers.

FIGURE 6: HOSPITALITY AND TOURISM JOBS IN GREATER NEW ORLEANS REGION, BY SKILL LEVEL, EARNINGS, EDUCATION, PREVIOUS WORK EXPERIENCE, AND ON-THE-JOB TRAINING REQUIRED

	Earnings Threshold = Median Wage	Education Required	Previous Work Experience Required	On-the-Job Training Required	Employment 2017	Projected Employment 2027
Low Skill	< $12/hr	No formal educational credential	None	Less than 1 month or none	61,700, 85%	68,700
Experience-based Skill	$12/hr	High school diploma (or equivalent)	80% require some (20% none)	1 month to 1 year	7,800, 11%	8,700
Middle Skill	$15/hr	Some college (short-term certificate or Associate's degree)	None	None	700, 1%	700
High Skill	N/A	Bachelor's degree or higher	None	None	2,400, 3%	2,800
TOTAL JOBS					72,600	81,000

Note: Employment figures are rounded to the nearest hundred.
Source: Emsi 2018 Q3

Some types of experience-based skill jobs, particularly supervisory positions, offer greater financial stability than others (*see Table 4*). These positions are less likely to be short-term or seasonal and more likely to be full-time with predictable schedules.

The majority of jobs in this is group are first-line supervisors of food preparation and serving workers, whose median wage is $14.33 per hour. Others offer a median wage of more than $15 per hour. For example, maintenance and repair workers earn a median wage of $17 per hour, and sales representatives earn a median wage of $20 per hour.

TABLE 4. TOP EXPERIENCE-BASED SKILL AND MIDDLE-SKILL OCCUPATIONS IN HOSPITALITY AND TOURISM INDUSTRY BY EMPLOYMENT, GREATER NEW ORLEANS REGION

KEY

Middle-skill jobs appear in **bold**; all other jobs are experience-based skill jobs.
Education: High school diploma or equivalent (HS), some college, no degree (SC), postsecondary nondegree award (PS), assoicate's degree (AA), bachelor's degree (BA)
Work experience required: None, less than 5 years (<5), more than 5 years (>5)
Typical on the job training: None, short-term (short), moderate term (mod), long term long)

Occupation	2017 % of industry	2017 Jobs	2027 Jobs	10-Year Change		Median Wage	Education/ experience/ training*
				Number	Percent		
First-Line Supervisors of Food Preparation and Serving Workers	3.3%	2,394	2,726	332	14%	$14.87	HS/<5/none
Maintenance and Repair Workers, General	1.9%	1,390	1,498	108	8%	$17.29	HS/none/mod
Chefs and Head Cooks	0.8%	589	687	98	17%	$18.65	HS/>5/none
First-Line Supervisors of Office and Administrative Support Workers	0.5%	399	419	20	5%	$23.12	HS/<5/none

Bookkeeping, Accounting, and Auditing Clerks	**0.5%**	**388**	**384**	**(4)**	**-1%**	**$17.81**	**SC/none/ mod**
First-Line Supervisors of Housekeeping and Janitorial Workers	0.5%	355	377	22	6%	$15.31	HS/<5/none
Food Service Managers	0.4%	298	374	76	26%	$25.35	HS/<5/none
Sales Representatives, Services, All Other	0.4%	261	295	34	13%	$19.94	HS/none/mod
First-Line Supervisors of Personal Service Workers	0.3%	239	266	27	11%	$14.92	HS/<5/none
First-Line Supervisors of Retail Sales Workers	0.3%	233	231	(2)	-1%	$16.70	HS/<5/none
Self-Enrichment Education Teachers	0.2%	181	234	53	29%	$14.94	HS/<5/none
Executive Secretaries and Executive Administrative Assistants	0.2%	133	116	(17)	-13%	$20.41	HS/<5/none
Captains, Mates, and Pilots of Water Vessels	**0.2%**	**131**	**137**	**6**	**5%**	**$40.88**	**PS/<5/none**
First-Line Supervisors of Mechanics, Installers, and Repairers	0.2%	125	135	10	8%	$28.44	HS/none/none
Concierges	0.1%	100	108	8	8%	$14.06	HS/none/mod

Source: Emsi 2018 Q3

Rationale for Wage Threshold

While we do not know the precise mix of single workers and those who are supporting families, we do know that almost 28 percent of workers in the New Orleans hospitality and tourism industry are under the age of 25—more than twice the proportion of workers in all industries in the region. Thus, although the workforce has a range of backgrounds and experiences, it is disproportionately young. The $12 per hour median wage threshold, while not a goal, recognizes the potential of experience-based skill jobs in this wage range, especially for young workers. Further, many of these experience-based skill jobs pay well above $12 per hour.

Over time, we share The Data Center's goal for the hospitality and tourism sector, of establishing pathways to careers that meet what the Center has identified as a living wage in its report *The New Orleans Prosperity Index* (*see accompanying box*).

The New Orleans Prosperity Index

A recent report on the New Orleans Prosperity Index, produced by The Data Center, notes that the average annual wages in hospitality (defined slightly differently than in this report) are about $22,000 for clusters that focus on serving local clientele (including fast-food restaurants, which were excluded from this analysis) and $34,000 for the hospitality and tourism clusters that export services to other regions.[31]

The report notes that this is far less than the living wage of more than $47,000 needed by a family of one adult and one child in New Orleans. The Data Center report is a well-respected resource on many issues, including equity and economic progress among various groups in the New Orleans region. The goal of the index is to inform a future vision for New Orleans by assessing the city's prosperity and resilience potential to find areas of opportunity across multiple systems.

Recent Demand for Experience-Based Skill Hospitality and Tourism Workers

Online job postings, often called "real-time labor market information," offer a helpful perspective on hiring trends. These data often highlight different information than traditional labor market information, such as the conventional government data sources cited above.

For example, during the 12-month period ending in May 2018, almost 12,000 job openings were posted online in hospitality and tourism in New Orleans and the region, representing about 14 percent of all postings in the time frame.[32] The majority of the postings, about 7,300 (or 61 percent) were in traveler accommodations, while more than 2,500 (22 percent) were in restaurants and other eating places. Together with special food services, these subsectors comprise close to 90 percent of all of the postings.

A closer look at the occupations being recruited provides additional insights into recent demand in the region, especially for those creating training or education programs. Just 14 occupations represent 55 percent of all of the postings in the sector during the previous 12 months. As Table 5 shows, four experience-based skill occupations included represent 20 percent of the postings during the period.

And the job posting data can exceed traditional job projections. For example, based on traditional labor market data, food service managers are projected to have about 400 openings in the sector each year. However, there were more than 800 positions posted during a recent 12-month period (*see Table 5*).

The data suggest the probability that more positions than anticipated were available due to new hires or existing workers exiting their jobs. It could also be that many employers are posting to develop a clearer picture of the applicant pool. Given the magnitude of the difference, it is probably a combination of factors that have contributed to the large number of postings relative to traditionally projected openings.

TABLE 5. HOSPITALITY AND TOURISM OCCUPATIONS, TOP 4 EXPERIENCE-BASED SKILL JOB POSTINGS, GREATER NEW ORLEANS REGION

Occupation	Skill level	12-Month Period	
		# Postings	% All Postings
Food Service Managers	Experience-based	812	7%
Cooks, Restaurant	Experience-based	663	6%
First-Line Supervisors of Food Preparation and Serving Workers	Experience-based	524	4%
Maintenance and Repair Workers, General	Experience-based	260	2%

Source: Burning Glass Technologies Labor Insight, June 2017-May 2018

Job Tenure in the Hospitality Industry

Not accounted for in this analysis are some of the characteristics of work in the industry that may cause workers to leave hospitality and tourism. It is beyond the scope of this snapshot to determine the precise reasons for worker departures. However, the data do demonstrate short tenure for a significant number of employees in the hospitality and tourism industry.

Nationally and across all industries, the median amount of time a person has been with an employer is 4.2 years. Older workers have longer median tenure (more than 10 years for workers 55-64 years old), while younger workers have shorter tenure (1.3 years for workers 20-24 years old). Accommodation and food services, combined, has a median tenure of 2.1 years. However, it is longer for those who work in accommodations (3.1 years) compared to food service workers (2.0 years).[33]

The Bigger Picture:
How This Snapshot Relates to Other Regional Industry Reports

The hospitality and tourism industry is vital to the economy of the New Orleans region, but there are other important industries in the region, as well. Several are on track for significant growth through 2027, including health care and educational services, and regional economic and workforce development organizations have highlighted these industries for study.

GNO, Inc., for one, has conducted extensive analysis of the regional economy, including producing "state of the sector" reports on key industries.[34] These reports can be helpful in identifying potential pathways from hospitality and tourism into other industries when career advancement within the sector is limited.

While these reports are valuable sources of information, analysts will note the use of differing methodologies than this snapshot and, hence, differing results. For example, GNO, Inc. includes in its definition of "middle-skill" occupations those that require a high school diploma if there is any level of on-the-job training, including short-term training of less than one month. In this snapshot, however, positions involving less than one month of on-the-job training are considered low skill. In addition, GNO, Inc. does not use earnings in its definition of "middle skill." So, while GNO includes nursing assistants, which require a postsecondary certification but earn less than $11 per hour, as middle skill, this snapshot would not.

PART 4

RECOMMENDATIONS

The New Orleans hospitality and tourism industry has the potential to help its workers, including those at the entry level, progress along pathways to family-supporting careers. They can do this by committing to and investing in structures and supports aimed specifically at encouraging workers' advancement through clearly articulated career pathways.

However, because there are fewer experience-based and middle-skill jobs than entry-level positions, employers in the industry must: create more family-supporting career opportunities; provide workers with higher wages, improved work conditions, and benefits to retain them long-term; and/or work with other sectors, as well as education and training providers, to build out pathways into other industries with similar skill requirements, when career progression is not possible in hospitality and tourism.

For employers to succeed in these efforts, it is essential to join with key regional stakeholders, including education and workforce systems, labor market experts, and community leaders. Together, they can improve the economic mobility of hospitality and tourism employees and strengthen the industry's supply of highly qualified job candidates. The following recommendations can assist in achieving these goals:

1. Be open to new ways of looking at employment trajectories and build on-ramps to family-supporting career pathways within and across industry sectors

"Earn and learn" programs, which combine education and job training, such as apprenticeships and other forms of work-based learning, have gained significant national attention in recent years as effective strategies for career advancement. It is important to identify these opportunities in all industry sectors, including hospitality and tourism, and recognize them as legitimate ways to prepare employees for higher-skill, higher-wage positions.

Because the hospitality industry already offers some work-based learning programs, such as a lodging manager apprenticeship, the industry has examples it can learn from and build on. However, the industry should also look at ways to offer employees opportunities to access postsecondary education where they can gain the skills they need to advance in their careers while also earning college credit, so that they can earn college degrees or certificates at a later date. These kinds of opportunities may earn good will with employees, aid in employee retention and increased productivity, as well as help employees to advance in their careers.

Experience-based skill jobs identified in this snapshot have the potential to offer career advancement opportunities for historically underserved populations in the greater New Orleans region if clear pathways to and from these jobs are made available, and efforts are made to ensure equitable career advancement. However, these pathways are not always well defined or promoted by employers. Industry leaders, along with education and training providers, can work together to build more formal pathways that can lead employees into, up within, and beyond experience-based skill job—including to outside industries.

To do this, employers should offer career navigation services and arrange for training opportunities that are both work-based and that are offered through more traditional classroom-based, employer provided, or online offerings. A commitment to internal promotions for frontline staff can simultaneously lessen the need for external recruitment and create new opportunities for employees who are already knowledgeable about an employer's core business activities, leading to longer employee persistence at the company.

In addition to work-based learning, the hotel industry has developed a variety of more formal practices that have significant promise for improving career advancement and employment opportunities for its employees, including entry-level and frontline workers. These practices include: the development of industry-recognized credentials and certifications; apprenticeships; partnerships with public education and training institutions (including postsecondary institutions); partnerships with community-based training providers; and employer-sponsored education and training programs leading to career advancement.

It is critical, as well, that industry employers also concentrate on how to grow the number of jobs at the higher-skill and higher-pay levels, so employees have sufficient options for staying in hospitality and tourism and earning family-supporting wages with benefits. Currently there is an over-concentration of low-pay, low-skill positions, which limit advancement and lead to higher turnover. This needs to change, even if it means creating smaller wage gains tied to mastery of certain skills, as opposed to full title changes. Smaller employers should explore ways to pool training and benefits to make these opportunities available to their workers.

AHLEF and NRAEF

The American Hotel and Lodging Educational Foundation (AHLEF) is an active partner in the development of industry-recognized certifications and career training programs that provide hotel employees with the skills needed by the industry and with opportunities for career advancement.

Working with leading brands and management companies across the country, AHLEF has created training curricula, performance standards, and certification exams for a broad range of occupations and functions within the industry. AHLEF offers coursework through online platforms as well as through courses with textbooks and digital materials to enable hotel employees to take advantage of learning. The foundation also provides resources for high schools, colleges, and workforce agencies in the hotel and lodging sector.

The National Restaurant Association Educational Foundation (NRAEF) offers similar education and career development programs that employers can work with in building career advancement strategies for its workers. It is important for employers to take advantage of these kinds of resources and to provide workers with time to participate in career development activities that can move them to family-supporting careers. The AHLEF and NRAEF have worked together in recent years to develop Registered Apprenticeship programs for managers, in connection with hospitality employers.

2. Collaborate across the region

Working collaboratively, through inter-industry and intra-industry efforts, is important if workers in hospitality and tourism are to have realistic opportunities to move to other employers, or even other industries, for advancement. The more industries and education and training partners understand the skill sets of workers in hospitality and tourism, the more likely it will be that their skills will be recognized as transferable. This goal is only achieved, however, by involving as many employers as possible. The data and analysis in this snapshot can be used to engage employers, industry associations, and education and workforce development systems to better understand career opportunities within the hospitality and tourism industry in the greater New Orleans region.

3. Get the message to young people that there are advancement opportunities in hospitality and tourism

The industry needs to do a much better job of communicating entry-level job opportunities to, and creating more advancement opportunities for, hospitality and tourism workers, job seekers, and system stakeholders. This includes providing clearly delineated career pathways that highlight corresponding skill and training requirements for progressively higher levels of work both within and outside of the industry. This is an important role that education and training providers can play, working with employers and industry associations to map the skills and credentials needed for higher level jobs and to ensure that where possible, skills are transferable across sectors.

NOLA Local Colleges

In New Orleans, Hilton has worked with two local colleges, Nunez Community College and Delgado Community College, to develop employee training programs. Nunez Community College offers a hotel, restaurant & tourism (HRT) training program that incorporates industry-based certifications in Business IT, Culinary Arts, and Entrepreneurship. Nunez also offers an adult learning program called Work Ready U, which provides career pathway options for adult learners including opportunities in hotels.

Delgado Community College offers a hospitality management program that is aligned with the University of New Orleans. Delgado focuses on associate's degree programs, but also provides adult education opportunities, workforce development programs, and accelerated career education for students in hospitality. Their 2 + 2 hospitality agreement means that students who complete a hospitality management associate's degree at Delgado can transfer to the University of New Orleans to complete and receive a full HRT bachelor's degree.

Delgado also provides a culinary arts and culinary management program for students interested in food and beverage service. These kinds of industry partnerships can be replicated in the region if employers, education, and workforce development systems work together to ensure that students and workers have access not only to training offered within and by the industry, but also in partnership with the industry—leading to high returns for employees and employers alike.

4. Support additional research

The analysis presented in this snapshot is a first step in creating an improved understanding of the hospitality and tourism industry in the greater New Orleans region—the identification of a category of jobs that depend upon skills that have been learned through experience and that pay at least a living wage for workers without dependents and a discussion about how to promote career advancement for low-wage workers. Several areas require further research to best position the industry for the creation of viable pathways to family-supporting careers, including:

- Employee advancement rates—to what extent are employees at various skill levels advancing over time in hospitality and tourism careers in the region? What characteristics do individuals display that lead to advancement and what characteristics impede advancement? There are emerging data sets, including resume data, that allow for this type of analysis.

- Regional collaboration— to what extent and how can education and workforce development systems work with the industry to better prepare workers with the skills needed to advance within the sector? Would better and expanded partnerships increase advancement opportunities for employees and increase productivity in the industry?

- Career mapping—more research is needed to advance career mapping within the industry that includes the knowledge, skills, and abilities gained through progressive levels of employment. This is key to building structured career pathways as well as for helping employees transition to other industries and occupations that offer increased career advancement opportunities.

- Industry differences—regional stakeholders have suggested that differences exist regarding employers' ability to create career advancement opportunities for employees based on the size of their business. For example, the hotel industry, where many establishments are owned by large corporations with a large workforce, can offer career pathways within their parent company even if not within a particular New Orleans hotel. Many restaurants, by contrast, face a greater challenge developing career pathways, because they are small businesses, with relatively few employees and little corporate infrastructure. Additional research could test this hypothesis and determine innovative ways to partner with smaller businesses to provide necessary work-based learning opportunities and career pathways, as well as benefits for all workers within the hospitality and tourism industry in New Orleans.

- The future of work— more research should be carried out to identify how the rapidly changing needs of the hospitality and tourism economy, including factors such as automation, are expected to affect opportunities in the industry.

APPENDIX A

METHODOLOGY

This report is based on analysis of labor market information (LMI) which is data about the regional economy. There are three primary types of LMI, described below, which together provide a robust understanding of the dynamics of and opportunities in the New Orleans region in general as well as the hospitality and tourism industry in particular.

What is labor market information?

Labor market information is the systematic collection, analysis, reporting, and publishing of a broad range of data that describes current economic conditions within a given geographic area. It can enhance decisions related to workforce and economic development, education and training, and policies and programs by informing the work of workforce development professionals, businesses, students, jobseekers, and educators.
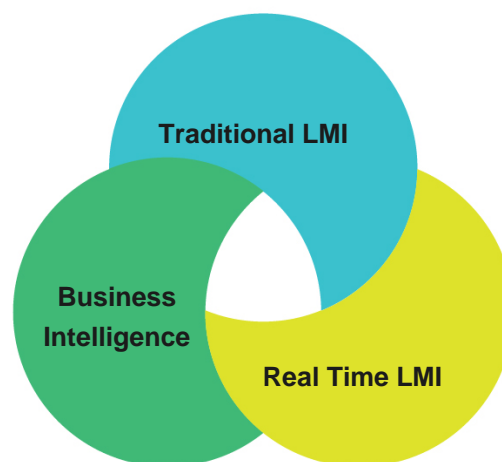
Three types of labor market information are necessary to make effective decisions around local or regional workforce development: traditional LMI, real-time LMI, and on-the-ground business intelligence.

Traditional LMI provides a robust picture of national, local, and regional labor markets based on government surveys or tax records. This data is typically collected by or in coordination with the U.S. Census Bureau, the Bureau of Labor Statistics, or other government organizations. It includes information on recent workforce employment, trends, and projections for standardized lists of industries and occupations. In order to ensure accuracy and representative results, there is a lag between when something is measured, and when that data are published and available for analysis. The rigorous collection process also makes the data costly to produce.

The majority of the traditional LMI in this report is from Emsi, a labor market data software provider that curates data from dozens of sources. Other data come directly from the U.S. Census Bureau, the Bureau of Labor Statistics, or the Louisiana Workforce Commission.

Real-time LMI is a short-hand description of data collected by aggregating information from jobs posted online. Proprietary services (here the vendor is Burning Glass Technologies) compile the data from tens of thousands of websites and parse out information such as skills, job titles,

and education requirements from each posting. The data can be analyzed in concert with traditional LMI to better understand the most recent trends in the labor market. It is important to recognize that postings data is a proxy for recent demand and is not actual hiring by companies. In addition, since postings are not written with this type of analysis in mind, they do not always include the same consistent data.

Business intelligence, the other type of LMI, consists of on-the-ground, first-hand information collected from businesses in the region. This can be done through formal business advisory meetings or other employer engagement activities, on collected in conversations. What distinguishes this category is that it comes directly from employers themselves and provides more granular information on their specific hiring needs, workforce-related challenges, and other factors that might impact their ability to recruit and retain workers.

Traditional LMI	Real Time LMI	Business Intelligence
Rigorous collection methodology	Timely; proxy for recent demand	On-the-ground insights from local businesses
Representative samples or census data	Insights into skills, including emerging skills	Can be used to supplement and verify data
Delayed release; not timely	Designed for recruitment, not analysis	Insight into future/ near-term demand

JFF analysis

This snapshot focuses on the first two types of LMI, traditional and real-time data. It can be used to provide a catalyst for conversations and engagement with the business community. A preliminary version of this work was presented to local workforce development, economic development, and business organizations in order to begin the dialogue and support the goal of creating a report that is detailed and accurate, as well as responsive to the needs of those who need actionable information and data to make decisions about workforce development programs and investments.

Finding compatible occupations for career pathways

Key to the development of career pathway examples in Appendix D is the use of a compatibility index. Designed by Emsi, the number provides a score that represents the compatibility of two occupations based on knowledge, skills, and abilities, as defined by the federally funded Occupational Information Network, or O*NET.

The figures display career paths for the entry-level positions, with pathways internal and external to the hospitality and tourism industry. Each option scores at least a 90 out of 100 on the Emsi compatibility index.

The occupations were chosen based on the score, the comparability of the educational attainment levels of the incumbents, demand for the receiving occupation (measured by projections and/or online postings), and the wages.

Limitations of data

When comparing employment projections, is it important to keep two things in mind for context. First, the projections made by the Bureau of Labor Statistics are calculated using assumptions that current major trends (demographics, laws and policy) will continue.[35] In addition, the projections do not consider new development or business that locals in the community may have additional information about. This is just one example of why it is helpful to use this source of traditional LMI alongside insights from job postings and employers in the region.

In addition, although the employment numbers and projections are very precise, it can be helpful to focus on overall directionality and relative size. For example, instead of expecting there to be exactly 983 more employees at food service contractors, note that the industry is among the fastest growing, it is projected to increase by more than a quarter over the next 10 years, and is in the top five industries in terms of size.

APPENDIX B

HOSPITALITY AND TOURISM INDUSTRY, COMPLETE LIST OF SUBSECTORS

Figure B1 lists all of the industry sectors that are part of the greater New Orleans regional hospitality and tourism industry, as defined in this report.[36] The first 13 subsectors (whose NAICS codes begin with 72) are part of the accommodation and food services sector. The next 17 subsectors (whose NAICS codes begin with 71) are part of museums, recreation, and supporting industries. The final 12 subsectors are spread across a number of parts of the economy, including scenic and sightseeing transportation and travel arrangement and reservation services.

TABLE B1: ECONOMIC SECTORS THAT COMPRISE THE HOSPITALITY AND TOURISM INDUSTRY IN THE GREATER NEW ORLEANS REGION

NAICS Code	Description
Accommodation and Food Services	
721110	Hotels (except Casino Hotels) and Motels
721120	Casino Hotels
721191	Bed-and-Breakfast Inns
721199	All Other Traveler Accommodation
721211	RV (Recreational Vehicle) Parks and Campgrounds
721214	Recreational and Vacation Camps (except Campgrounds)
721310	Rooming and Boarding Houses, Dormitories, and Workers' Camps
722310	Food Service Contractors
722320	Caterers

NAICS Code	Description
722410	Drinking Places (Alcoholic Beverages)
722511	Full-Service Restaurants
722514	Cafeterias, Grill Buffets, and Buffets
722515	Snack and Nonalcoholic Beverage Bars
Museums, Recreation, and Supporting Industries	
711211	Sports Teams and Clubs
711212	Racetracks
711219	Other Spectator Sports
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
712190	Nature Parks and Other Similar Institutions
713110	Amusement and Theme Parks
713120	Amusement Arcades
713210	Casinos (except Casino Hotels)
713290	Other Gambling Industries
713910	Golf Courses and Country Clubs
713920	Skiing Facilities
713930	Marinas
713940	Fitness and Recreational Sports Centers
713950	Bowling Centers

NAICS Code	Description
713990	All Other Amusement and Recreation Industries
Other Hospitality and Tourism Sectors	
114210	Hunting and Trapping
453220	Gift, Novelty, and Souvenir Stores
453920	Art Dealers
487110	Scenic and Sightseeing Transportation, Land
487210	Scenic and Sightseeing Transportation, Water
487990	Scenic and Sightseeing Transportation, Other
532284	Recreational Goods Rental
561510	Travel Agencies
561520	Tour Operators
561591	Convention and Visitors Bureaus
561599	All Other Travel Arrangement and Reservation Services
611620	Sports and Recreation Instruction

Source: U.S. Census Bureau North American Industry Classification System (NAICS)

APPENDIX C
SUPPLEMENTAL DATA

FIGURE C1. AGE OF WORKFORCE BY REGION
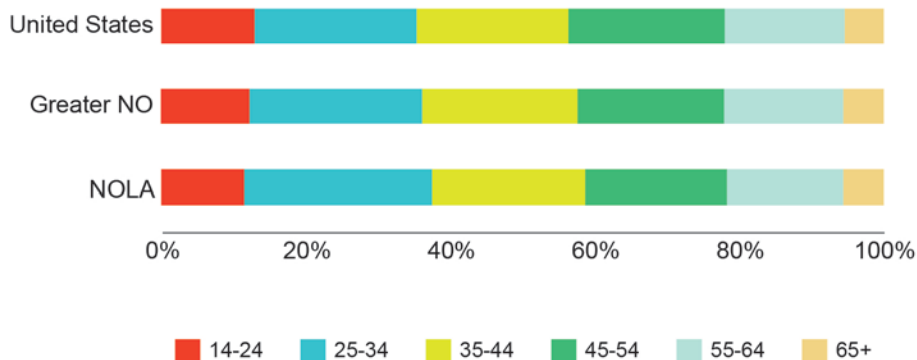
Source: EMSI 2018 Q3

FIGURE C2. RACE/ETHNICITY OF WORKFORCE BY REGION
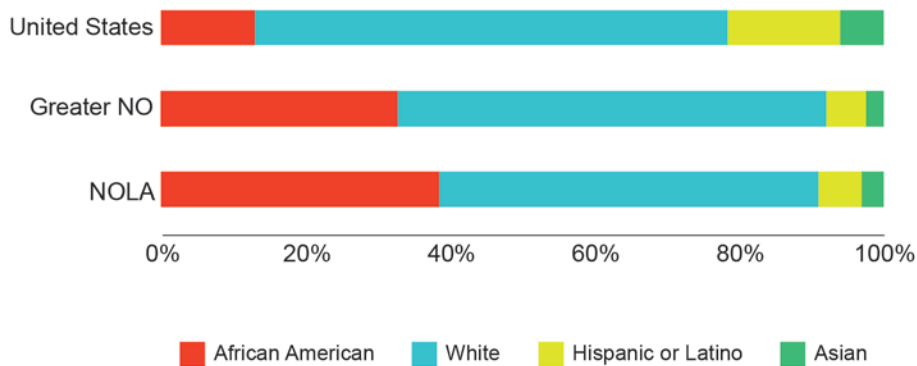
Source: EMSI 2018 Q3

TABLE C1. GREATER NEW ORLEANS REGIONAL EMPLOYMENT, TOP 10 INDUSTRIES

Industry	2017 % of All Jobs	2017 Jobs	2027 Jobs	10-Year Change	
				Number	Percent
Government	14%	84,067	84,067	(6,587)	-8%
Accommodation and Food Services	14%	81,677	81,677	9,292	11%
Health Care and Social Assistance	13%	76,605	76,605	19,632	26%
Retail Trade	12%	71,007	71,007	1,659	2%
Administrative and Support and Waste Management and Remediation Services	6%	35,044	35,044	1,686	5%
Manufacturing	6%	33,743	33,743	(410)	-1%
Professional, Scientific, and Technical Services	5%	32,681	32,681	2,718	8%
Construction	5%	30,344	30,344	989	3%
Transportation and Warehousing	4%	26,368	26,368	782	3%
Wholesale Trade	4%	23,401	23,401	(201)	-1%

Source: EMSI 2018 Q3

TABLE C2. CITY OF NEW ORLEANS EMPLOYMENT, TOP 10 INDUSTRIES

Industry	2017 % of All Jobs	2017 Jobs	2027 Jobs	10-Year Change	
				Number	Percent
Accommodation and Food Services	20%	39,543	46,018	6,475	16%
Government	14%	26,838	22,226	(4,612)	-17%
Health Care and Social Assistance	11%	22,242	28,103	5,861	26%
Educational Services	8%	15,874	19,841	3,967	25%
Retail Trade	8%	15,106	16,167	1,061	7%
Professional, Scientific, and Technical Services	7%	14,154	14,707	553	4%
Administrative and Support and Waste Management and Remediation Services	6%	11,985	12,787	802	7%
Transportation and Warehousing	4%	7,000	6,222	(778)	-11%
Arts, Entertainment, and Recreation	3%	6,001	7,377	1,376	23%
Other Services (except Public Administration)	3%	5,625	5,747	122	2%

Source: EMSI 2018 Q3

TABLE C3. CITY OF NEW ORLEANS, TOP 10 HOSPITALITY AND TOURISM SUBSECTORS, BY EMPLOYMENT

Industry	2017 % of All Jobs	2017 Jobs	2027 Jobs	10-Year Change	
				Number	Percent
Full-Service Restaurants	38%	14,887	17,997	3,110	21%
Hotels (except Casino Hotels) and Motels	24%	9,549	9,802	253	3%
Drinking Places (Alcoholic Beverages)	8%	3,274	3,271	(3)	0%
Casino Hotels	5%	2,124	2,708	584	27%
Food Service Contractors	5%	2,057	3,054	997	48%
Snack and Nonalcoholic Beverage Bars	4%	1,472	2,008	536	36%
Zoos and Botanical Gardens	2%	809	892	83	10%
Museums	2%	615	763	148	24%
Racetracks	2%	599	816	217	36%
Fitness and Recreational Sports Centers	1%	580	671	91	16%

Source: EMSI 2018 Q3

FIGURE C3. AGE DISTRIBUTION OF KEY HOSPITALITY AND TOURISM OCCUPATIONS, GREATER NEW ORLEANS REGION
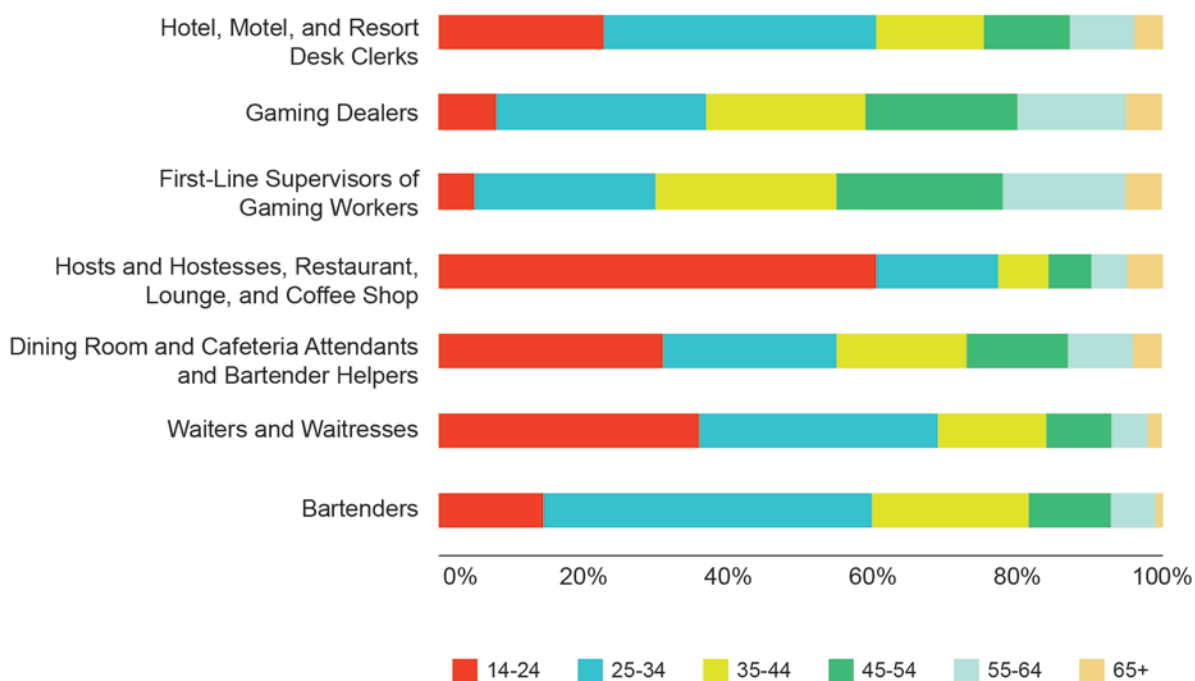
Source: Emsi 2018 Q3

FIGURE C4. RACE/ETHNICITY DISTRIBUTION OF KEY HOSPITALITY AND TOURISM OCCUPATIONS, GREATER NEW ORLEANS REGION

Legend: African American, White, Hispanic or Latino, Asian
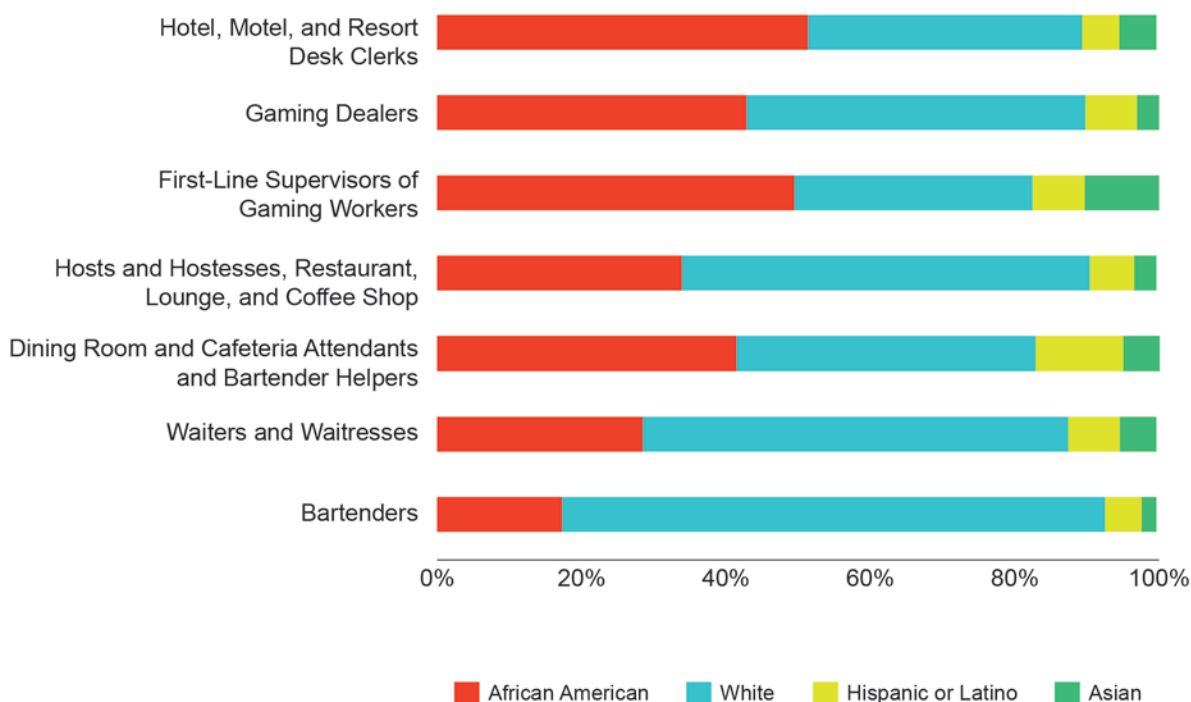
Source: Emsi 2018 Q3

TABLE C4. HIGH-SKILL JOBS, HOSPITALITY AND TOURISM, GREATER NEW ORLEANS REGION

Occupation	2017 Jobs	2027 Jobs	10-Year Change		Median Wage
			Number	Percent	
General and Operations Managers	780	873	93	12%	$42.43
Coaches and Scouts	221	282	61	28%	$17.73
Teachers and Instructors, All Other	173	212	39	23%	$15.23
Lodging Managers	135	146	11	8%	$23.59

Managers, All Other	110	122	12	11%	$37.85
Accountants and Auditors	104	119	15	14%	$30.98
Business Operations Specialists, All Other	93	105	12	13%	$20.61
Curators	88	103	15	17%	$19.38
Museum Technicians and Conservators	78	93	15	19%	$12.80
Meeting, Convention, and Event Planners	78	95	17	22%	$21.40
Sales Managers	60	65	5	8%	$42.78
Market Research Analysts and Marketing Specialists	52	68	16	31%	$22.80
Financial Managers	48	57	9	19%	$43.89
Administrative Services Managers	47	54	7	15%	$38.01

Note: A high-skill job is defined as requiring at least a bachelor's degree.
Source: EMSI 2018 Q3

TABLE C5. LOW-SKILL JOBS, HOSPITALITY AND TOURISM, GREATER NEW ORLEANS REGION

Occupation	2017 Jobs	2027 Jobs	10-Year Change		Median Wage
			Number	Percent	
Waiters and Waitresses	14,900	16,593	1,693	11%	$8.81
Cooks, Restaurant	6,721	7,769	1,048	16%	$10.42
Food Preparation Workers	4,780	5,324	544	11%	$8.84
Bartenders	4,359	4,543	184	4%	$9.10
Maids and Housekeeping Cleaners	3,776	4,005	229	6%	$9.95
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	2,854	3,135	281	10%	$9.13
Dishwashers	2,447	2,695	248	10%	$9.05
Cashiers	2,320	2,373	53	2%	$8.90
Combined Food Preparation and Serving Workers, Including Fast Food	1,966	2,759	793	40%	$8.98
Dining Room and Cafeteria Attendants and Bartender Helpers	1,679	1,906	227	14%	$9.69
Hotel, Motel, and Resort Desk Clerks	1,189	1,280	91	8%	$10.99
Cooks, Short Order	997	1,000	3	0%	$10.12
Waiters and Waitresses	14,900	16,593	1,693	11%	$8.81

Note: A low-skill job is defined as requiring a high school diploma or less, and little on-the-job training or previous work experience. It also includes any occupation with a median wage of less than $12 per hour.
Source: EMSI 2018 Q3

APPENDIX D

EXAMPLES OF CAREER PATHWAYS IN AND OUTSIDE OF HOSPITALITY AND TOURISM, GREATER NEW ORLEANS REGION

The majority of entry-level jobs in the hospitality and tourism industry are low skill and low paying. However, these occupations can be the first step toward higher-level opportunities, including the experience-based skill and middle-skill jobs discussed above, if structured career pathways are established and made accessible to industry workers.

This section discusses the potential of career pathways for providing economic opportunities for people entering the hospitality and tourism industry in the New Orleans region. It also illustrates possible pathways extending to jobs outside of the industry.

These examples begin with entry-level jobs that pay less than a living wage and suggest potential trajectories to progressively higher-skill and higher-pay jobs (*see "What are career pathways?"*). While there is potential in these pathways for increasing the number of family-supporting careers in the New Orleans hospitality and tourism industry, it is up to employers, working with education and workforce development partners in the region, to make this happen across the industry.

What are career pathways?

Career pathways within an industry are structured, sequenced and accessible job ladders and lattices through which workers can progress from entry-level positions to progressively higher-skill and higher-wage jobs. Career pathway "roadmaps" can illustrate for employees clear pathways to higher level jobs as well as the education and skills needed for career progression. Pathways should be accompanied by navigation and support services for workers as they progress to higher level, family supporting careers.

The pathways illustrated below present three scenarios within hospitality and tourism, as well as opportunities for transitioning into other industries.[37] They are based in part on a "compatibility index," a numerical score that represents the compatibility of two occupations based on knowledge, skills, and abilities required. (The index was designed by Emsi, a labor market data software provider that curates data from dozens of sources. *See methodology in Appendix A for additional information.*) A score of 90 is the minimum to be considered as viable for progressing between occupations. The closer the score is to 100, the more compatible the two

occupations are considered. The potential of inter-industry opportunities are key because as skill levels within the industry increase, the number of jobs decrease.

Each job along the pathways include: the occupation title; median wage; and skill level (high, experience-based, low). Pathways within hospitality and tourism are shown in blue; pathways to jobs outside of hospitality and tourism are shown in green.

FIGURE D1: HOUSE PERSON → DIRECTOR OF CUSTOMER SERVICE

Notes: Housekeeping manager = first-line supervisor of housekeeping and janitorial workers; director of customer service = general and operations managers.

DIRECTOR OF CUSTOMER SERVICE
- Median wage: $43/hour
- High skill

Annual Postings: 684

HOUSEKEEPING MANAGER
- Median wage: $15/hour
- Typical education: HS or equivalent
- Experience-based skill

Annual Postings: 218

SOLDERERS & BRAZERS
- Median wage: $23/hour
- Typical education: HS or equivalent
- Experience-based skill

Annual Postings: 164

LAUNDRY WORKER
- Median wage: $11/hour
- Typical education: Less than HS
- Low skill

Annual Postings: 101

STOCK CLERKS: SALES FLOOR
- Median wage: $11/hour
- Typical education: HS diploma or equivalent
- Low skill

Annual Postings: 510

HOUSE PERSON
- Median wage $10/hour
- Typical education: HS or equivalent
- Low skill

Annual Postings: 735

As depicted in Figure D1, the first pathway example starts with a low-skill occupation of house person and shows a progression through laundry work and up to a housekeeping manager, where median wages are 50 percent higher, at $15 per hour. There are also potential opportunities to move into other industries through other low-skill positions as well as to an experience-based skill position. These potential pathways are discussed in more detail below.

Intra-industry pathway

Moving from a laundry worker along a career pathway is not easy or guaranteed. The examples here require a commitment from the worker and the employer to fill the gaps in knowledge. The compatibility index for housekeeping managers and laundry workers is 90.

- Knowledge gaps exist for increased levels of customer service, training, and personnel management required for housekeeping managers. Skill gaps in monitoring, time management, and social perceptiveness also exist.
- Like many management positions, these supervisors do not require any on-the-job training but do typically require work experience of less than five years.
- A well-designed work-based learning program could facilitate career progression by providing a way to close the knowledge and skills gaps.

Inter-industry pathways

Solderers and brazers, employed primarily in manufacturing and construction, have a skills transferability index of 97 with laundry workers.

- Laundry workers would be able to leverage their knowledge of production and processing, but would need to increase their knowledge of mechanics, design, and engineering technology.
- Solderers and brazers, like laundry workers, rely on the skills of operation monitoring and active listening. However, the laundry workers would need to increase their skills in monitoring and quality control.
- The lowest hourly wage for solderers and brazers (about $15 at the 10th percentile) is higher than the wages for laundry workers at the 90th percentile ($14).

The compatibility between stock clerks and housekeeping workers is 96, indicating that there may be opportunities for housekeeping-related workers to move in to sectors such as production and/or retail.

- Housekeeping workers would be able to leverage their knowledge of customer service but would need to build their knowledge of sales and marketing and mathematics.
- Housekeeping workers would bring skills related to monitoring and time management, however they would need to increase their skills in speaking and active listening.

FIGURE D2: BELL PERSON → GENERAL AND OPERATIONS MANAGER

LOSS PREVENTION MANAGER
- Median wage: $38/hour
- Typical education: Bachelor's degree
- High skill

Annual Postings: 40

GENERAL & OPERATIONS MANAGER
- Median wage: $43/hour
- Typical education: Bachelor's degree
- High skill

Annual Postings: 684

LODGING MANAGER
- Median wage: $24/hour
- Typical education: Bachelor's degree
- High skill

Annual Postings: 284

COURIERS & MESSENGERS
- Medan wage: $14/hour
- Typical education: HS or equivalent
- Low skill

Annual Postings: 35

FIRST-LINE SUPERVISORS OF PERSONAL SERVICE WORKERS
- Median wage: $15/hour
- Typical education: Bachelor's degree or some postsecondary
- Middle/high skill

Annual Postings: 26

CONCIERGE
- Median wage: $14/hour
- Typical education: HS diploma or equivalent
- Experience-based skill

Annual Postings: 115

BAGGAGE PORTERS & BELLHOPS
- Median wage: $11/hour
- Typical education: HS or equivalent
- Low skill

Annual Postings: 197

HOTEL, MOTEL, & RESORT DESK CLERKS
- Median wage: $11.20/hour
- Typical education: HS or equivalent
- Low skill

Annual Postings: 794

MEDICAL RECORDS & HEALTH INFO TECHNICIAN
- Median wage: $16/hour
- Typical education: HS diploma or equivalent
- Experience-based skill

Annual Postings: 294

The second pathway also begins in accommodations; however, this potential route is more customer facing. It begins with a low-skill occupation, such as a desk clerk or bellhop, and progresses through supervisors and managerial roles. The intra-industry pathway, discussed in more detail below, would be well suited for someone who was able to gain knowledge about a number of aspects of the industry, and was willing to move parallel, then to roles with progressively more responsibility. There are also two potential inter-industry opportunities. One leads to an experience-based position in health care and the other to a low-skill job in another industry. However, these industry moves can also be seen as the first rung on the ladder of that industry, not the end of their progression.

Intra-industry pathway: Hotel Desk Clerk and Porter to Lodging Manager

Hotel clerks have a compatilbility index of 96 with concierges.

- Although the skills for both occupations, including service orientation, active listening, and critical thinking are similar in level and importance, there are many differences in the knowledge required.
- The most important knowldege gaps are related to clerical, administriative, and sales responsibiliies.
- These differences make the concierge role a good fit for work-based learning strategies, as only moderate (one month to less than a year) on-the-job training is required.

The compatibility index of the concierge role with first-line supervisors of personal service workers is 92.

- Though wages are close at the median, the supervisors have the potential to earn $23 at the 90th percentile, compared to $17 for concierges.
- There are modest differences in the knowledge required for the two occupations, notably in personnel supervision and psychology.
- The skills gaps are more significant, in areas including time management, social perceptiveness, monitoring, and instructing.
- Supervisors are an experience-based skill occupation, typically requiring less than five years of experience. A worker in a non-supervisory role could leverage their experience and, combined with work-based learning—particularly a program that coupled on-the-job training with classroom activities focusing on some of the larger skills gaps—become successful in a supervisory position.

The compatibility index for first-line supervisors of personal service workers and lodging managers is 93.

- About 28 perent of lodging managers currently in the position have less than a four-year college degeee. This could offer support for the finding from an earlier hospitality industry scan that many workers are promoted from within.
- There are differences in the skills resquired for the two occupations, notably service orientation, writing, negotiation, persuasion, and active listening.
- The knowledge gaps are more significant, in areas including clerical, personnel supervision, basic English language, and sales and marketing.
- Similar to the tranition from concierge to supervisor, the transition to lodging manager (which also requires less than 5 years of work experience and no on-the-job training) could be aided by work-based learning, including classroom instruction to fill knowledge gaps.

Inter-industry pathway: Porters to Messengers

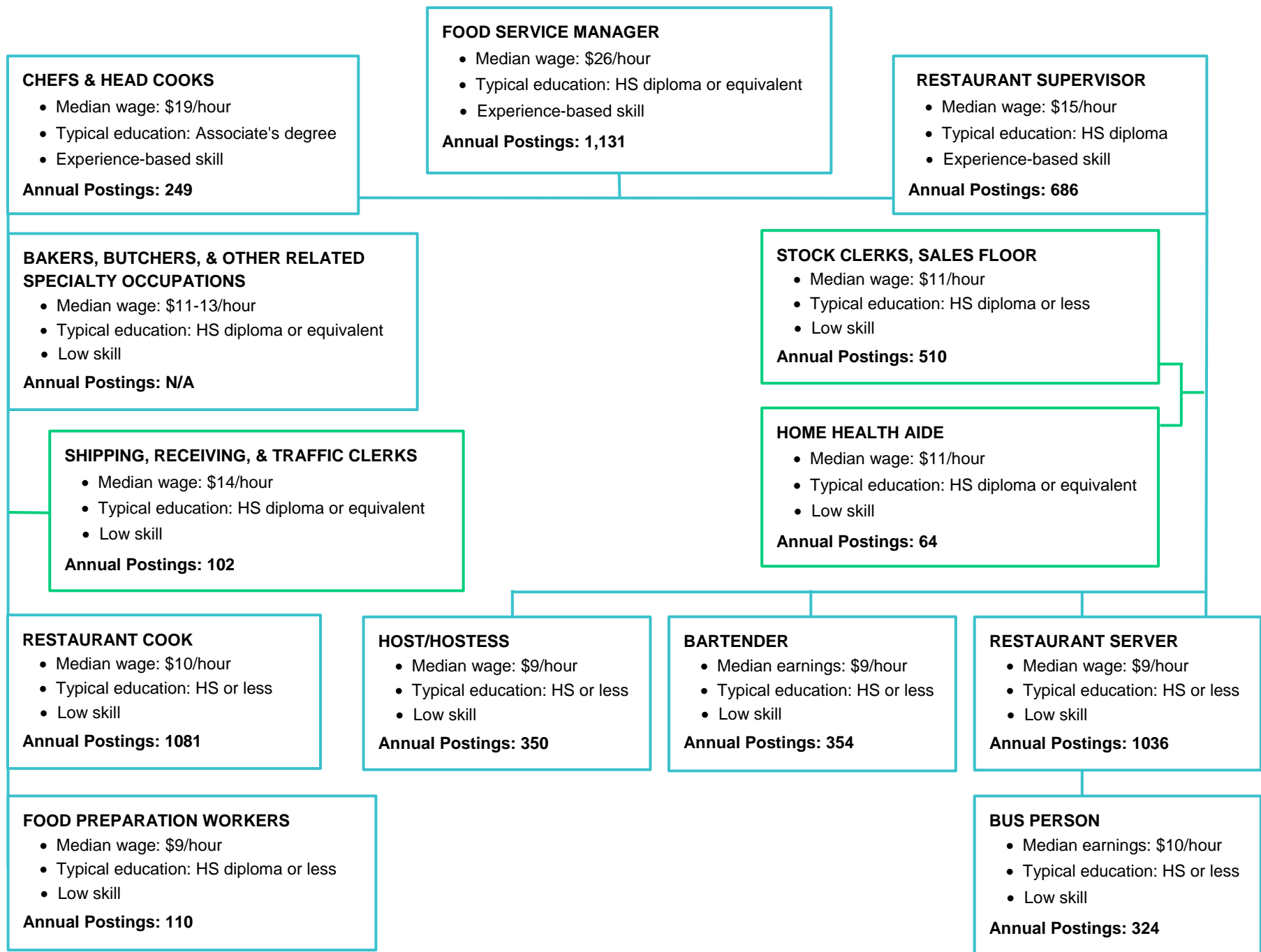Messengers have a compatibility index of 96 with baggage porters and bellhops.

- The most importat knowledge gap is in transportation.
- There are skills gaps related to time management and writing.
- Although the difference in wages is not large, especially at the 90th precentile ($18 versus $20), messengers provide a connection to opportunities in other industries, such as tranportation, as well as legal and medical offices that hire their own delivery staff.

Inter-industry pathway: Hotel Clerk to Medical Records Technician

Hotel clerks and medical records and health information technicians have a compatibility index of 94.

- The medical records technicians typically require a postsecondary credential, however, almost half only have a high school diploma.
- The occupations use similar skills and have a small knowledge gap, as specific medical or dental knowledge are not essential to this entry-level health occupation.
- Using wages at the 10th percentile as a proxy for entry level, they are higher for medical records technicians ($11.50) than for clerks at the median ($11); wages at the 75th percentile and above are 40-50 percent greater.
- There are no work experience requirements or on the job training required for the technician.
- This inter-industry pathway would be a good fit for education and training providers helping entry-level hospitality workers transition to other industries.

FIGURE D3: BUS PERSON → FOOD SERVICE MANAGER   *Note: Bus person = dining room and cafeteria attendants and bartender helpers*

FOOD SERVICE MANAGER
- Median wage: $26/hour
- Typical education: HS diploma or equivalent
- Experience-based skill

Annual Postings: 1,131

CHEFS & HEAD COOKS
- Median wage: $19/hour
- Typical education: Associate's degree
- Experience-based skill

Annual Postings: 249

RESTAURANT SUPERVISOR
- Median wage: $15/hour
- Typical education: HS diploma
- Experience-based skill

Annual Postings: 686

BAKERS, BUTCHERS, & OTHER RELATED SPECIALTY OCCUPATIONS
- Median wage: $11-13/hour
- Typical education: HS diploma or equivalent
- Low skill

Annual Postings: N/A

STOCK CLERKS, SALES FLOOR
- Median wage: $11/hour
- Typical education: HS diploma or less
- Low skill

Annual Postings: 510

SHIPPING, RECEIVING, & TRAFFIC CLERKS
- Median wage: $14/hour
- Typical education: HS diploma or equivalent
- Low skill

Annual Postings: 102

HOME HEALTH AIDE
- Median wage: $11/hour
- Typical education: HS diploma or equivalent
- Low skill

Annual Postings: 64

RESTAURANT COOK
- Median wage: $10/hour
- Typical education: HS or less
- Low skill

Annual Postings: 1081

HOST/HOSTESS
- Median wage: $9/hour
- Typical education: HS or less
- Low skill

Annual Postings: 350

BARTENDER
- Median earnings: $9/hour
- Typical education: HS or less
- Low skill

Annual Postings: 354

RESTAURANT SERVER
- Median wage: $9/hour
- Typical education: HS or less
- Low skill

Annual Postings: 1036

FOOD PREPARATION WORKERS
- Median wage: $9/hour
- Typical education: HS diploma or less
- Low skill

Annual Postings: 110

BUS PERSON
- Median earnings: $10/hour
- Typical education: HS or less
- Low skill

Annual Postings: 324

The final pathway example is in the restaurant industry. It shows two progressions, one that moves through the back of house and one through the front of house operations, both culminating in a food service manager, an experience-based skill job. The inter-industry occupations are examples of starting points in other industries that have slightly higher wages.

Intra-industry pathways

The food service pathway is a traditional pathway in hospitality.

- The comparability index for food preparation workers to cooks is 94, and from cooks to head cook or chef, it is 85.
- Most of the knowledge and skills gaps for food preparation workers is related to coordination, monitoring, and food production.
- Cooks require moderate (less than one year) on-the-job training and less than five years of work experience, which makes this an excellent transition for employer-based work-based learning.
- Head chefs, an experience-based skill occupation, typically have five or more years' experience, and are a logical next step for cooks, especially with employer supports.

Inter-industry pathways

Home health aides and stock clerks have compatibility of over 90 with entry-level hospitality occupations. This might be a feasible transition if the additional wages from tips is not a factor. Transitioning to another industry through these occupations can open additional opportunities, as well.

The Role of Cross-Training in the Hotel Industry

A recent JFF industry scan of the hotel industry, which included interviews with workers and managers, found that many hotel staff cross-train in different categories, often working in two or more occupational roles at a property over the course of a week.[38] Cross-training allows workers to explore careers and pick up full-time hours and benefits. For employers, cross-training is a way to support the development of staff while ensuring that essential functions can be covered by multiple staff if needed. This cross-training model provides opportunities for on-the-job training that can lead to career advancement.

In addition, since many of the experience-based skill jobs in this industry snapshot require less than a year of training on the job, this tool could be used to move entry-level workers into higher-level positions. The scan also found that, according to the American Hotel and Lodging Educational Foundation, over 50 percent of hotel industry C-suite executives began their careers in hourly entry-level positions in the industry, and over 50 percent of hotel general managers began as hourly employees.

ENDNOTES

[1] "How Many Tourists Visited New Orleans in 2017? The Answer Depends on Who You Ask," *The Times-Picayune*, May 14, 2018, https://www.nola.com/business/index.ssf/2018/05/tourist_count_new_orleans_cvb.html.

[2] This report focuses on both the city of New Orleans and the greater New Orleans region. The city of New Orleans is equivalent to Orleans parish. (A parish in Louisiana is equivalent to a county in most other states.) The greater New Orleans region is defined as the group of 10 parishes, including the city, commonly used for economic development analysis of the area. This region includes the eight parishes of the metropolitan statistical area (a designation of the U.S. Census Bureau), plus Tangipahoa and Washington parishes.

[3] Economic Modeling Specialists International (Emsi) 2018 Q3. The hospitality and tourism industry, as defined in this report, is based on information from the U.S. Cluster Mapping project, led by the Harvard Business School. The industry includes 42 sectors. *See* Appendix B, Table B1, for a complete list. For information on the U.S. Cluster Mapping Project, *see* http://www.clustermapping.us/content/cluster-mapping-methodology.

[4] Unless a different source is provided, data in this section come from Emsi, a Strada company, which curates data from government sources, including the U.S. Census Bureau and the Bureau of Labor Statistics. The data are updated quarterly. Emsi 2018 Q3 refers to the third-quarter release from 2018. Unless noted, data in this section come from Emsi 2018 Q3.

[5] All data in this section come from Emsi 2018 Q3.

[6] All data in this section come from the U.S. Census Bureau's 2012-2016 American Community Survey 5-Year Estimates.

[7] All data in this section come from Emsi 2018 Q3.

[8] Data in this section refer to the metropolitan statistical area, a region designated by the U.S. Census Bureau. It includes eight of the 10 parishes in the greater New Orleans region defined above. *Zeroing In on Place and Race: Youth Disconnection in America's Cities*, Measure of America (Brooklyn, NY: Social Science Research Council, 2015), http://ssrc-static.s3.amazonaws.com/wp-content/uploads/2015/06/MOA-Zeroing-In-Final.pdf.

[9] All data in this section come from Emsi 2018 Q3.

[10] All data in this section come from *The New Orleans Index at Ten: Measuring Greater New Orleans' Progress toward Prosperity*, The Data Center, 2015, https://s3.amazonaws.com/gnocdc/reports/TheDataCenter_TheNewOrleansIndexatTen.pdf.

[11] "Alternative Measures of Labor Underutilization for States, Fourth Quarter of 2017 through Third Quarter of 2018 Averages," Bureau of Labor Statistics, https://www.bls.gov/lau/stalt.htm. The commonly reported unemployment rate is the U-3 rate, which includes unemployed persons who are available for work and have looked for a job during the four weeks prior to the survey. The U-6 unemployment rate measures those counted by U-3, as well as (a) discouraged workers (are available for work and have looked in the past 12 months, but not in the previous four weeks) and (b) the marginally employed who work part time (35 or fewer hours per week because their hours were decreased or they are unable to find a full-time job) and prefer to work full time. The 12-month average U-3 rate for the nation (beginning fourth quarter 2017) was 4.0 percent, compared to 4.8 percent for Louisiana. The U-6 rates were 7.8 percent and 9.1 percent, respectively. The rates are not available for smaller regions, but it is probable that the rate for the New Orleans region is also higher than the nation.

[12] *Louisiana Workforce at A Glance: July 2018*, Louisiana Workforce Commission, http://www.laworks.net/Downloads/LMI/LMIBulletin.pdf.

[13] Emsi 2018 Q3. The monthly national labor force participation rates for 2018 have shown a modest upward trend.

[14] Emsi 2018 Q3.

[15] U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015; Employment, 2nd Quarter of 2002-2015). The employment and labor force numbers are different than those reported elsewhere in the snapshot because the most recent data are from 2015.

[16] Accommodation and food services is an economic sector, designated by the North American Industry Classification System (NAICS), which is used by government agencies to collect, analyze, and publicize data related to the economy. The hospitality and tourism industry includes accommodation and food services but also includes other sectors. (*See* Appendix B, Table B1, for a complete list of hospitality and tourism sectors.)

[17] Emsi 2018 Q3.

[18] http://gnoinc.org/about-us/

[19] https://www.nolaba.org/about/

[20] Emsi 2018 Q3. The analysis in this section does not include "limited services" or fast-food restaurants because stakeholder engagement with the local workforce and economic development communities determined that the needs and characteristics of that subsector were sufficiently distinct to warrant its exclusion. Limited-service restaurants employ over 21,000 workers in the region, including more than 5,000 in New Orleans. Close to half of these workers are in food preparation and serving.

[21] Emsi 2018 Q3.

[22] Bourree Lam, "How Much Do Waiters Really Earn in Tips?" *The Atlantic*, February 18, 2015, https://www.theatlantic.com/business/archive/2015/02/how-much-do-waiters-really-earn-in-tips/385515/.

Occupational Outlook Handbook, Waiters and Waitresses, on the Internet, Bureau of Labor Statistics, U.S. Department of Labor, https://www.bls.gov/ooh/food-preparation-and-serving/waiters-and-waitresses.htm#tab-5.

[23] Emsi 2018 Q3.

[24] The demographics of individual occupations can be analyzed, but they cannot be limited by industry. The occupations discussed in this section all have at least 90 percent of their workforce in hospitality and tourism and represent half of all workers in the industry. Only occupations with at least 500 employees are included below.

[25] *See* "The Role of Tips in Earnings" later in this snapshot for additional discussion of tips, both regionally and nationally.

[26] Education and Training Data Definitions, Bureau of Labor Statistics, Employment Projections, https://www.bls.gov/emp/documentation/nem-definitions.htm#education.

The Bureau of Labor Statistics assigns categories of typical education required for entry into an occupation, the amount of previous work experience required in a related occupation, and the amount of on-the-job training required to become competent in the occupation. The percentages are calculated by aggregating the occupations according to the BLS methodology.

[27] Emsi 2018 Q3.

[28] Emsi 2018 Q3.

[29] The living wage for an adult with no dependents in New Orleans is $11.37. MIT Living Wage Calculator, http://livingwage.mit.edu/metros/35380.

[30] Poverty Data Tables, U.S. Census Bureau, https://www.census.gov/topics/income-poverty/poverty/data/tables.html.

[31] *The New Orleans Prosperity Index: Tricentennial Edition*, The Data Center, https://www.datacenterresearch.org/reports_analysis/prosperity-index/.

[32] Burning Glass Technologies Labor Insight, June 2017–May 2018.

[33] "Employee Tenure in 2018," Bureau of Labor Statistics, U.S. Department of Labor, January 2018, https://www.bls.gov/news.release/pdf/tenure.pdf.

[34] *See* http://gnoinc.org/news/publications/state-of-the-sector/

[35] *Employment Projections: Handbook of Methods*, Bureau of Labor Statistics, undated, pages 3–4, https://www.bls.gov/opub/hom/emp/pdf/emp.pdf.

[36] *See* Endnote 3 for definition.

[37] The pathways developed for this report are loosely based upon those developed by Schrock and Kossy, *Career Pathways & Crosswalks in the Hotel, Retail, and Restaurant Industries*, 2007, http://www.workforcepartnersmetrochicago.org/media/1169/pathwayreport.pdf. All data cited here are from Emsi 2018 Q3, excluding the job postings data, which were pulled from Burning Glass Technologies. Job postings are for a 12-month period, ending in May 2018.

[38] *Opportunities in the Hotel Industry, Scan Results*, unpublished report, Jobs for the Future, May 2017.