

# New Jersey's Leisure, Hospitality and Retail Cluster

Prepared by:  
New Jersey Department of Labor  
& Workforce Development  
Office of Research and Information  
Bureau of Labor Market Information  
Spring 2015

## LEISURE, HOSPITALITY & RETAIL: Background

- Whether you are out for a meal, buying jeans or down the shore at a New Jersey casino or boardwalk, jobs in the Leisure, Hospitality & Retail (LHR) industry are all around you. While there are many entry-level jobs with entry-level hourly wages, many of those jobs can lead workers to a variety of long-term career paths to better paying jobs. In some LHR occupations, workers are paid mainly through tips, allowing workers in those occupations opportunities to earn well above the minimum wage. Hard work, people skills and the right attitude can take an employee a long way in LHR and advanced education is rarely required.
- New Jersey has a well-earned reputation as a place for great entertainment, vacations and shopping which is why the LHR industry continues to thrive throughout the state. The northern part of the state has a higher concentration of retail and hospitality jobs with its higher density of shopping malls and hotels in close proximity to New York City and large corporate centers. The southern part of the state has fewer large malls, although it does have shopping outlets, and tourism is strongly represented in its shore towns including Atlantic City.

LEISURE, HOSPITALITY & RETAIL

**Industry Cluster:  
Description and Overview**

# What is the Leisure, Hospitality and Retail (LHR) Industry Cluster? Composition of NAICS Codes

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## 44-45 Retail Trade

- 441 Motor Vehicle and Parts Dealers
- 442 Furniture and Home Furnishings Stores
- 443 Electronics and Appliance Stores
- 444 Building Material & Garden Supply Stores
- 445 Food and Beverage Stores
- 446 Health and Personal Care Stores
- 447 Gasoline Stations
- 448 Clothing and Clothing Accessories Stores
- 451 Sporting Goods/Hobby/Book/Music Stores
- 452 General Merchandise Stores
- 453 Miscellaneous Store Retailers
- 454 Non-store Retailers

## 71 Arts, Entertainment & Recreation

- 711 Performing Arts and Spectator Sports
- 712 Museums, Parks and Historical Sites
- 713 Amusement, Gambling & Recreation Ind

## 72 Accommodations and Food Services

- 721 Accommodations
- 722 Food Services and Drinking Places



# Highlights of the LHR Industry Cluster



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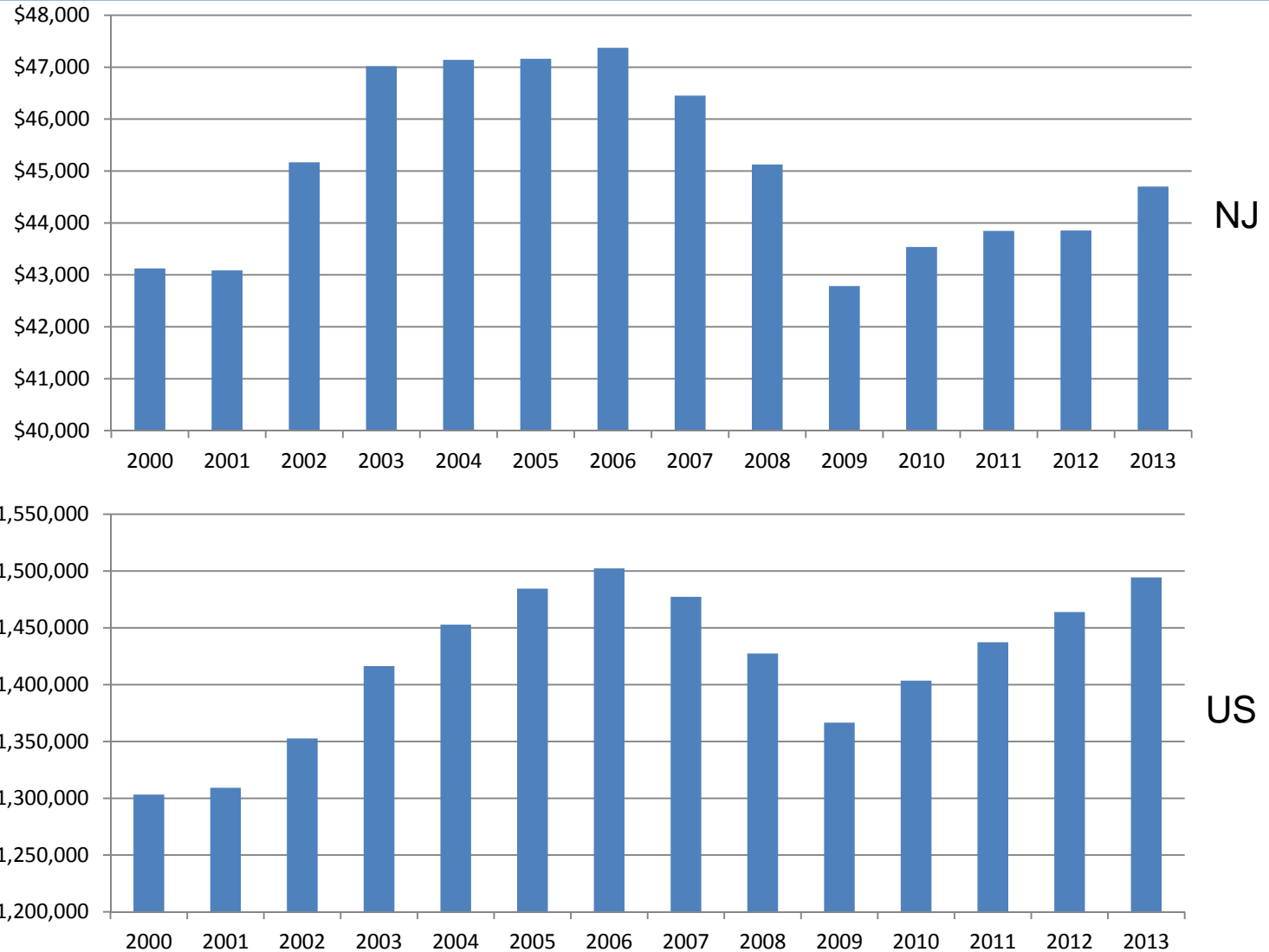
- The latest data show that:
  - Leisure, hospitality and retail trade (LHR) employment totaled 796,788 in 2013, or nearly one-quarter (24.6%) of all private sector workers in the state. In comparison, the cluster represented 25.9 percent of the nation's private sector employment in 2013.
  - LHR represented \$44.7 billion or 8.8 percent of the state's real Gross Domestic Product in 2013.
  - New Jersey LHR employers paid nearly \$22 billion in wages during 2013, or 11.5 percent of the state total. In addition, LHR businesses accounted for 21.5 percent of all units in the statewide total private sector in 2013.
- Many of the businesses within LHR are involved in New Jersey's travel and tourism and directly support 320,328 jobs, a slight increase over 2012 (0.5 percent).

Source: NJ Division of Travel and Tourism

Source: NJLWD, Quarterly Census of Employment and Wages, Bureau of Economic Analysis  
Prepared by: New Jersey Department of Labor and Workforce Development, November 2014

# Leisure, Hospitality & Retail Real GDP: 2000 - 2013 (millions of chained 2009 dollars): NJ vs. US

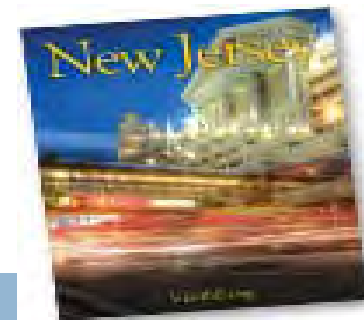
The real gross domestic product (GDP) in the US has nearly returned to its pre-recession levels of 2006 while NJ is gradually improving since its 2009 low but still is below its 2006 level.



Source:  
Bureau of Economic Analysis  
Prepared by: New Jersey  
Department of Labor and  
Workforce Development,  
November 2014

# Tourism

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- Since the state's LHR industry cluster has a symbiotic and overlapping relationship with tourism, it is good news that more than \$40 billion in overall tourism-related demand was generated. Visitor spending, capital investment and general government support of tourism tallied a record of \$40.4 billion, a 1.3 percent increase over 2012. Visitation in New Jersey also rose to 87.2 million in 2013, a 5.9 percent increase compared to 2012.
- Tourism directly supports 320,238 jobs, a slight increase over 2012 (less than 1%). This is also good news for New Jersey, as employment growth in 2013 meant that tourism employment has grown for three consecutive years while sustaining more than 511,750 jobs including indirect and induced impacts. These jobs represent 9.9 percent of total employment or one-in-ten jobs in New Jersey.
- Tourism generated \$35.9 billion of state GDP in 2013, or 7 percent of the entire state economy. Were tourism in New Jersey a company, its sales would rank #70 on the Fortune 500 list – more than Sears, DuPont and Hess.
- Including both direct and indirect impacts, tourism in New Jersey generated \$4.6 billion in state and local taxes and \$5.2 billion in federal taxes last year.



Source: NJ Division of Travel & Tourism; Tourism Economics,  
An Oxford Economics Company

# LHR By Industry



➤ The 2013 average annual wage for New Jersey's LHR cluster was \$27,516 or less than half the state average for all private sector workers (\$59,026).

➤ In comparison, the annual average wage in the nation's LHR cluster was \$24,321 in 2013 or nearly 50 percent (48.9%) of the national average for all private sector workers (\$49,700).

New Jersey's Leisure, Hospitality & Retail Trade Cluster (2013)			
Industry Components	Employment	Establishments	Average Annual Wage (\$)
LHR Cluster	796,788	54,154	27,516
Retail Trade	446,058	31,226	30,940
Arts/Entertainment/Recreation	56,681	3,620	34,176
Accommodations	57,100	1,361	33,267
Food Services & Drinking Places	236,949	17,947	18,091
<b>Private Sector Employment, NJ Total</b>	<b>3,234,796</b>	<b>251,194</b>	<b>59,026</b>
Source: NJ Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, 2013 Annual Average			

➤ Total wages paid in New Jersey's LHR industry cluster during 2013 accounted for just 11.5 percent of the private sector wages paid in the state.

➤ The LHR cluster's much lower average annual wage reflects the entry level, lower skill, seasonal and part-time nature of many of the occupations found within it.

LEISURE, HOSPITALITY & RETAIL

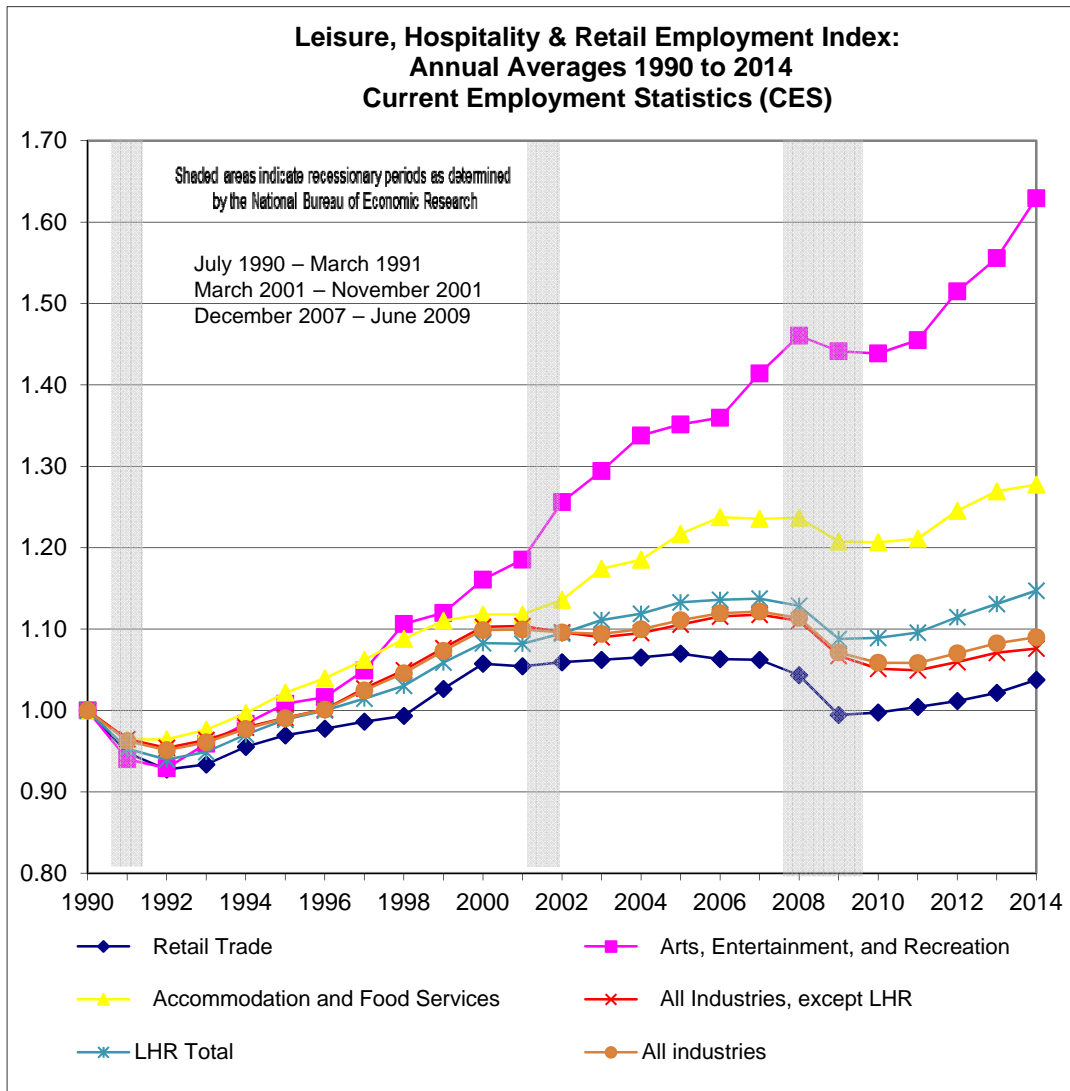
**Detailed Industry Employment:  
Current and Trend Analysis**

# Current Employment Statistics (CES): Description

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- Preliminary monthly estimates are based on reports submitted by a sample of New Jersey employers.
- The estimates are benchmarked each year based on more complete and accurate counts of data, which are obtained primarily from employer reports required by the State's unemployment insurance system.
- The employment data are grouped by industry according to the 2012 North American Industry Classification System (NAICS).

NJ's LHR employment performed slightly below the private sector as a whole and excluding LHR from 1990-2002. Since then, the cluster has performed slightly better.



➤ From 1990 to 2014, LHR has added 104,300 new jobs in New Jersey or about 31.9 percent of the state's employment gain. However, its share of total employment increased only slightly during this period, from 19.5 percent in 1990 to 20.5 percent in 2014.

➤ Employment in Arts, Entertainment and Recreation has grown 62.9 percent over the last 24 years.

➤ The recession and consumer spending has led Retail employment to be the laggard among LHR's major components.

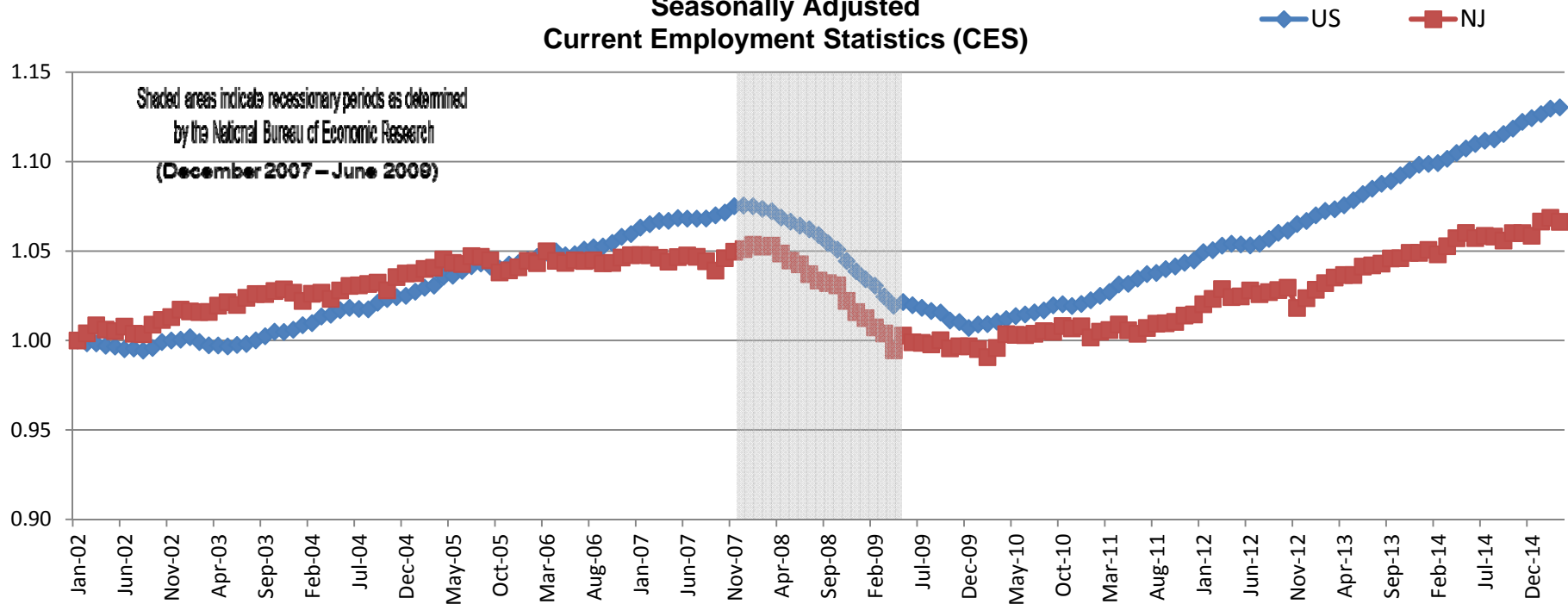
*(For illustrative purposes: NAICS 721 & 722 combined)*

Source: NJLWD, Current Employment Statistics, Annual Averages  
Prepared by: New Jersey Department of Labor and Workforce Development, May 2015

## From about 2002 to late 2005, employment growth in NJ's LHR industry cluster generally outperformed the nation.

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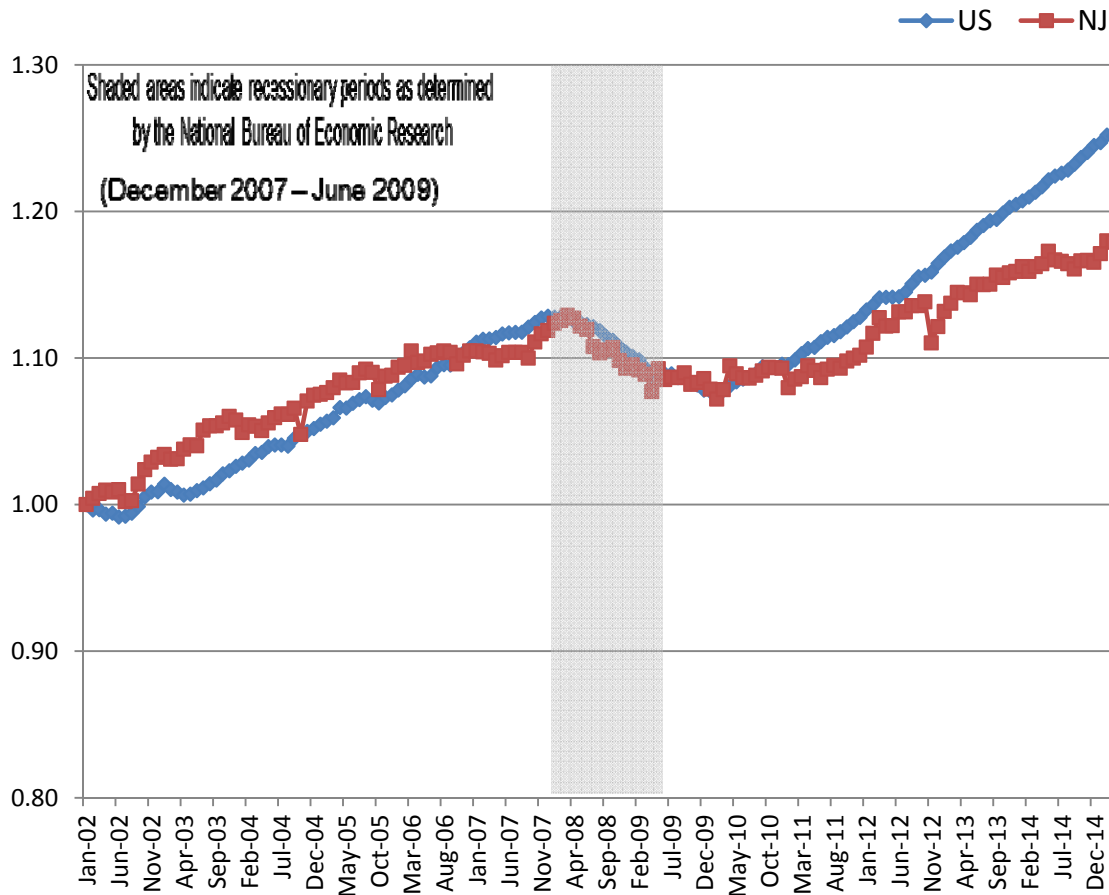
**NJ and US Leisure, Hospitality & Retail Industry Cluster Employment Index**  
**January 2002 – March 2015 (Preliminary)**  
**Seasonally Adjusted**  
**Current Employment Statistics (CES)**



➤ Since 2005, growth in the state's LHR cluster has lagged that of the nation. The worst national recession since the Great Depression deserves credit for most of the job losses in the LHR cluster. Businesses that were surviving in a growing economy with liberal credit for both consumers and businesses found the going tough when consumers severely cut back on discretionary spending and banks tightened lending standards.

# NJ and US Employment Index Leisure & Hospitality January 2002 – March 2015 (Preliminary) Seasonally Adjusted Current Employment Statistics (CES)

**NJ and US *Leisure and Hospitality* Employment Index**



Source: NJLWD, Current Employment Statistics

Prepared by: New Jersey Department of Labor and Workforce Development, May 2015

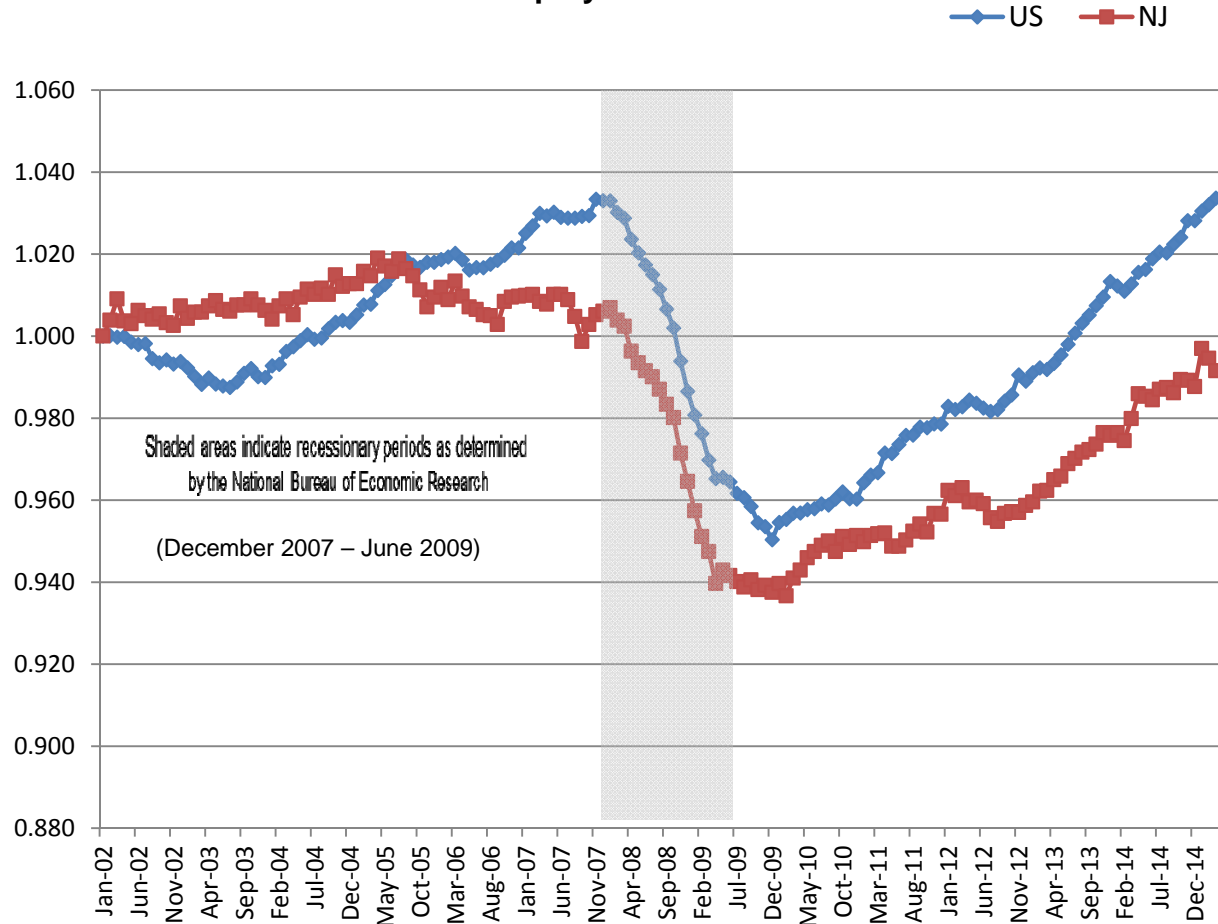
From January 2002 until the fall of 2006, employment in leisure and hospitality fared better in the state than the U.S.

From the end of 2006 to the end of 2010, LHR job growth in NJ and the U.S. occurred at about the same pace.

Since then, leisure and hospitality employment in the U.S. has taken off separating itself from NJ's lackluster inconsistent performance which is mainly due to the downsizing and closing of several casino hotels in Atlantic City in recent years.

# NJ and US Employment Index Retail Trade January 2002 – March 2015 Seasonally Adjusted Current Employment Statistics (CES)

**NJ and US *Retail* Employment Index**



From January 2002 until around September 2005, retail employment fared better in the state than the U.S.

Since then, the two have followed a similar trend. However, NJ's retail employment has remained below that of the nation

Source: NJLWD, Current Employment Statistics

Prepared by: New Jersey Department of Labor and Workforce Development, May 2015

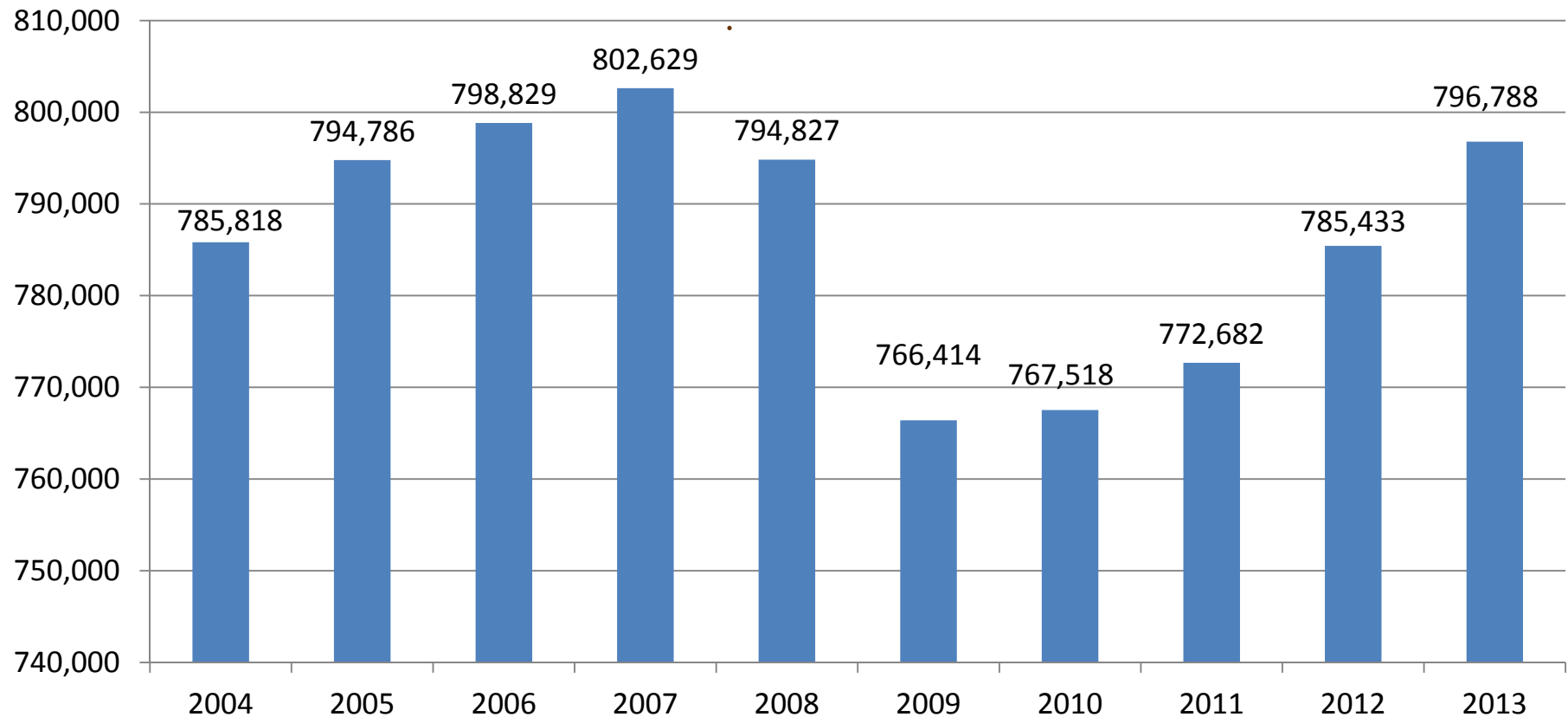
# Quarterly Census of Employment and Wages (QCEW): Description

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- Tabulations of employment and wage data for employers covered under the New Jersey Unemployment Compensation Law. QCEW is a program of the Bureau of Labor Statistics, U.S. Department of Labor.
- Beginning with the release of 2001 annual and 2002 quarterly data, the program has switched to the North American Industry Classification System (NAICS) as the basis for the assignment and tabulation of economic data by industry.
- NAICS uses a production-oriented approach to categorize economic units. Units with similar production processes are classified in the same industry. NAICS focuses on how products and services are created, as opposed to the SIC focus on what is produced. This approach yields significantly different industry groupings than those produced by the SIC approach.

# Leisure, Hospitality & Retail Quarterly Census of Employment & Wages Employment: Annual Averages 2004 - 2013

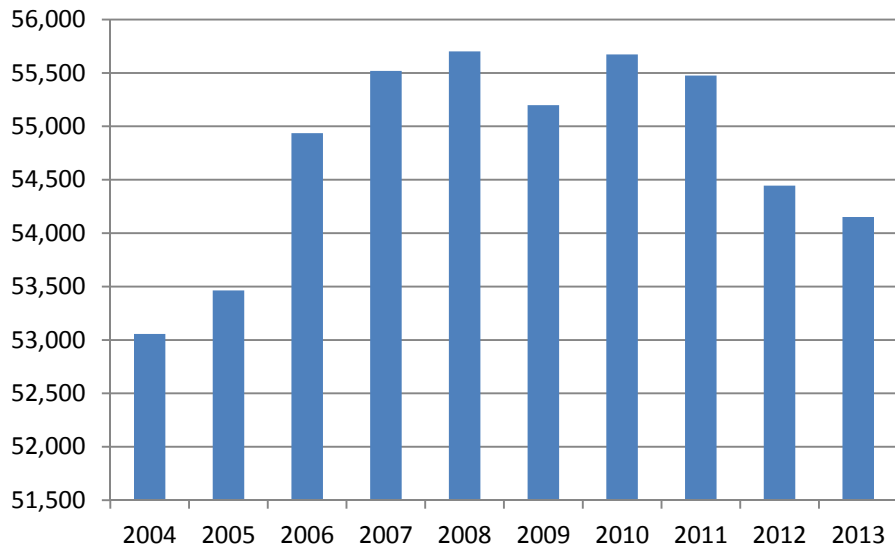
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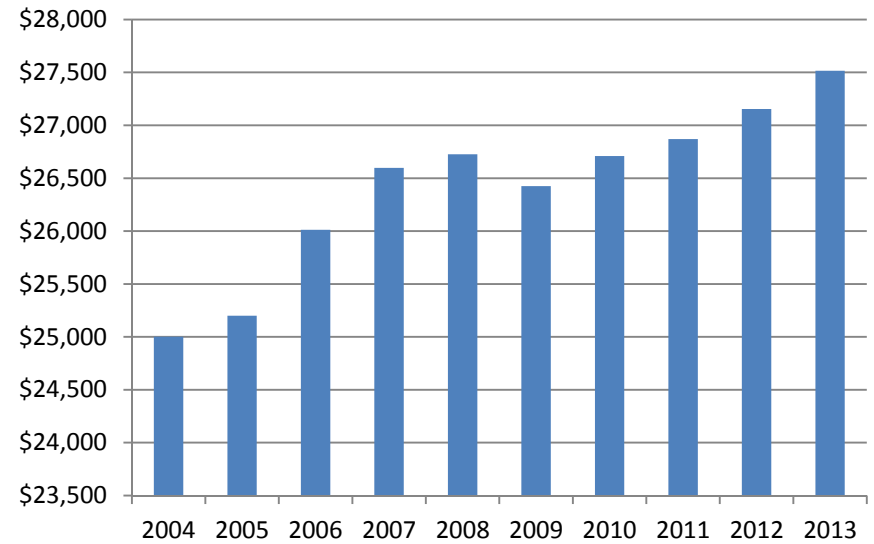
As illustrated above, New Jersey's LHR employment has shown steady improvement after being down in two consecutive years: '07-'08 and '08-'09...as a result of the recession

# Leisure, Hospitality & Retail Quarterly Census of Employment & Wages Establishments & Wages: Annual Averages 2004 - 2013

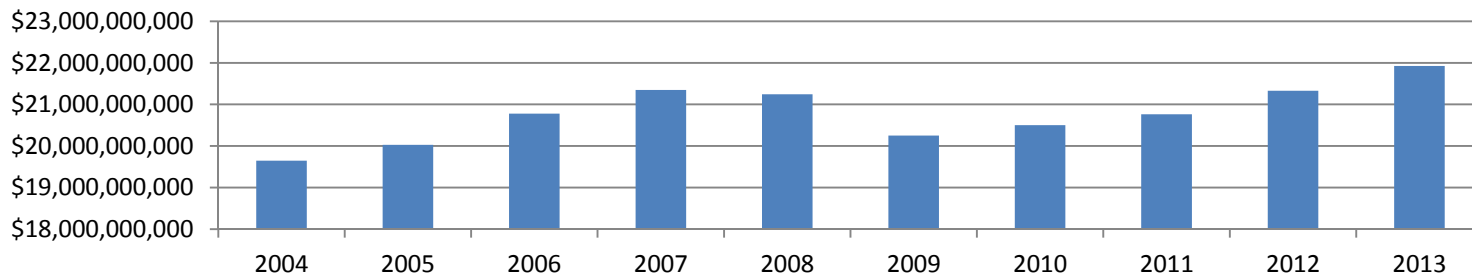
### Establishments/Units



### Annual Wages



### Total Wages

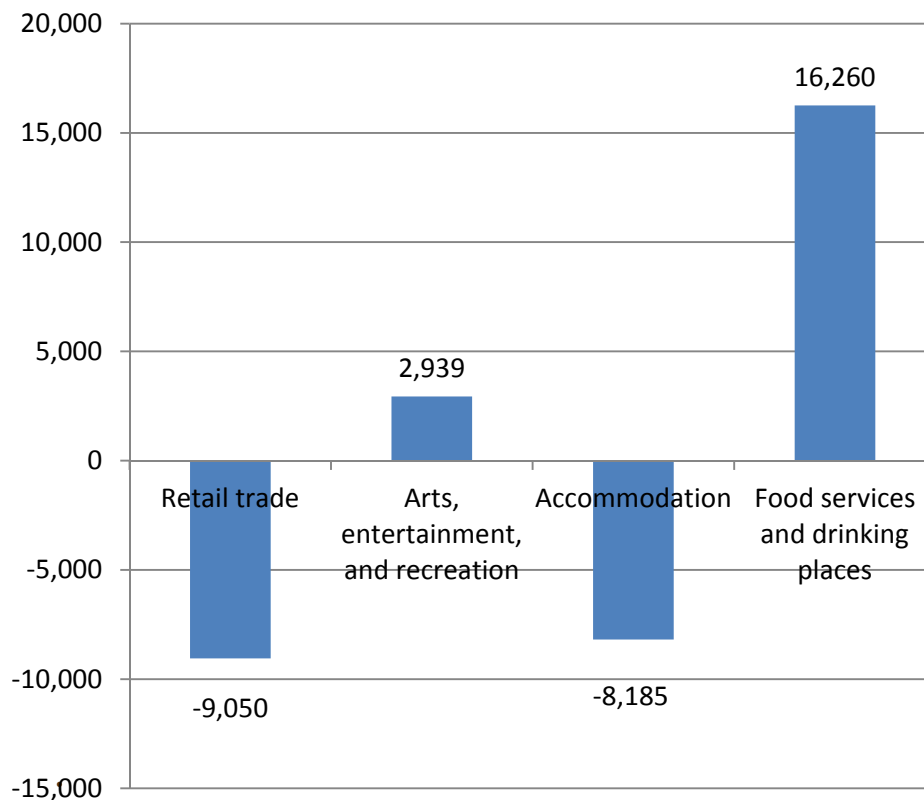


Source: NJLWD, Quarterly Census of Employment and Wages, Annual Averages  
Prepared by: New Jersey Department of Labor and Workforce Development, November 2014

# More Recent Analysis: 2008 - 2013

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NJ LHR Employment Change: 2008 to 2013



Source: NJLWD, Quarterly Census of Employment and Wages  
Prepared by: New Jersey Department of Labor and Workforce Development,  
November 2014

- Retail trade job levels dropped over 9,000 while employment in Accommodations fell nearly 8,200. For retail in particular, NJ is an inviting marketplace given its population density (highest in the nation) and per capita income (second highest). As a result, competition is intense and margins are tight.
- Inject a serious national recession with a sharp decline in discretionary spending into the mix and the recent retail job losses are not surprising. In Accommodations, 97.2 percent or 7,958 of the losses occurred within Atlantic City's casino hotels.
- The other two of the cluster's four primary components (Food Services/Drinking Places and Arts/Entertainment/Recreation) added jobs during this five-year period. Full-service restaurants accounted for about 73.3 percent in the Food Services/Drinking Places industry, while Fitness & Recreational Sports Centers created most of the new jobs (80.7%) in the Arts/Entertainment/Recreation industry.

Breaking the four primary components into their 17, three-digit NAICS industries and comparing the state's percent change in employment to the nation's from 2008-to-2013 yields the table below:

		2008-2013	
		Percent Change	
<u>NAICS</u>	<u>Industry</u>	<u>NJ</u>	<u>US</u>
447	Gasoline stations	14.8	2.1
443	Electronics and appliance stores	-2.8	-11.5
454	Nonstore retailers	14.5	6.0
452	General merchandise stores	9.6	1.5
713	Amusements, gambling, and recreation	7.5	1.8
441	Motor vehicle and parts dealers	-1.5	-2.1
722	Food services and drinking places	7.4	7.9
445	Food and beverage stores	0.7	2.3
448	Clothing and clothing accessories stores	-8.2	-5.7
444	Building material and garden supply stores	-6.7	-3.8
453	Miscellaneous store retailers	-7.8	-4.4
442	Furniture and home furnishings stores	-18.9	-15.5
711	Performing arts and spectator sports	0.1	3.8
451	Sporting goods, hobby, book and music stores	-15.7	-7.1
446	Health and personal care stores	-9.1	0.6
721	Accommodation	-12.5	-0.5
712	Museums, historical sites, zoos, and parks	-11.5	8.1

- While employment in New Jersey's and the nation's three-digit industries often moved in tandem, either both rising or both declining, it was not always the case.
- Two NJ LHR industries posted losses while the nation's rose: Health and Personal Care Stores (-9.1% vs. +0.6%) and Museums, Parks and Historical Sites (-11.5% vs. +8.1%).
- The state LHR industry that posted the largest difference in employment gain than the nation was Gasoline Stations (+14.8% vs. +2.1%) due to Wawa's ongoing expansion. NJ is one of two states (Oregon is the other) without self-service thus creating extra jobs.
- The significant gain in nonstore retailers could be partly attributed to an increase in online shopping.

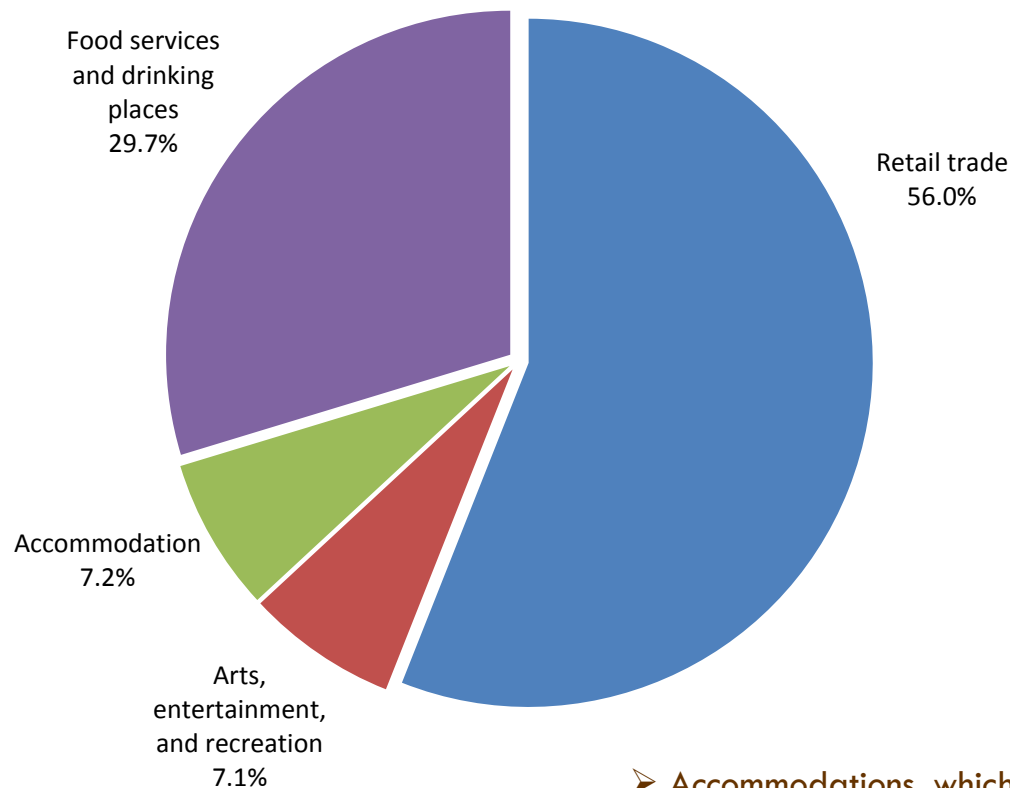
Source: NJLWD, Quarterly Census of Employment and Wages

Prepared by: New Jersey Department of Labor and Workforce Development, December 2014

# 2013 Percentage of employment: Four primary components

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**NJ LHR Employment by Major Industry Components  
2013 Annual Averages**



➤ In terms of employment, the Retail Trade and Food Services/Drinking Places components combined accounted for more than four of every five jobs (86%) in the LHR cluster in 2013.

➤ Most of the businesses in the LHR cluster are familiar to even the most casual observer. Retail Trade, which represented 56.0 percent of the cluster's employment in 2013, has nearly one of every four jobs (24.6%) in Food Stores.

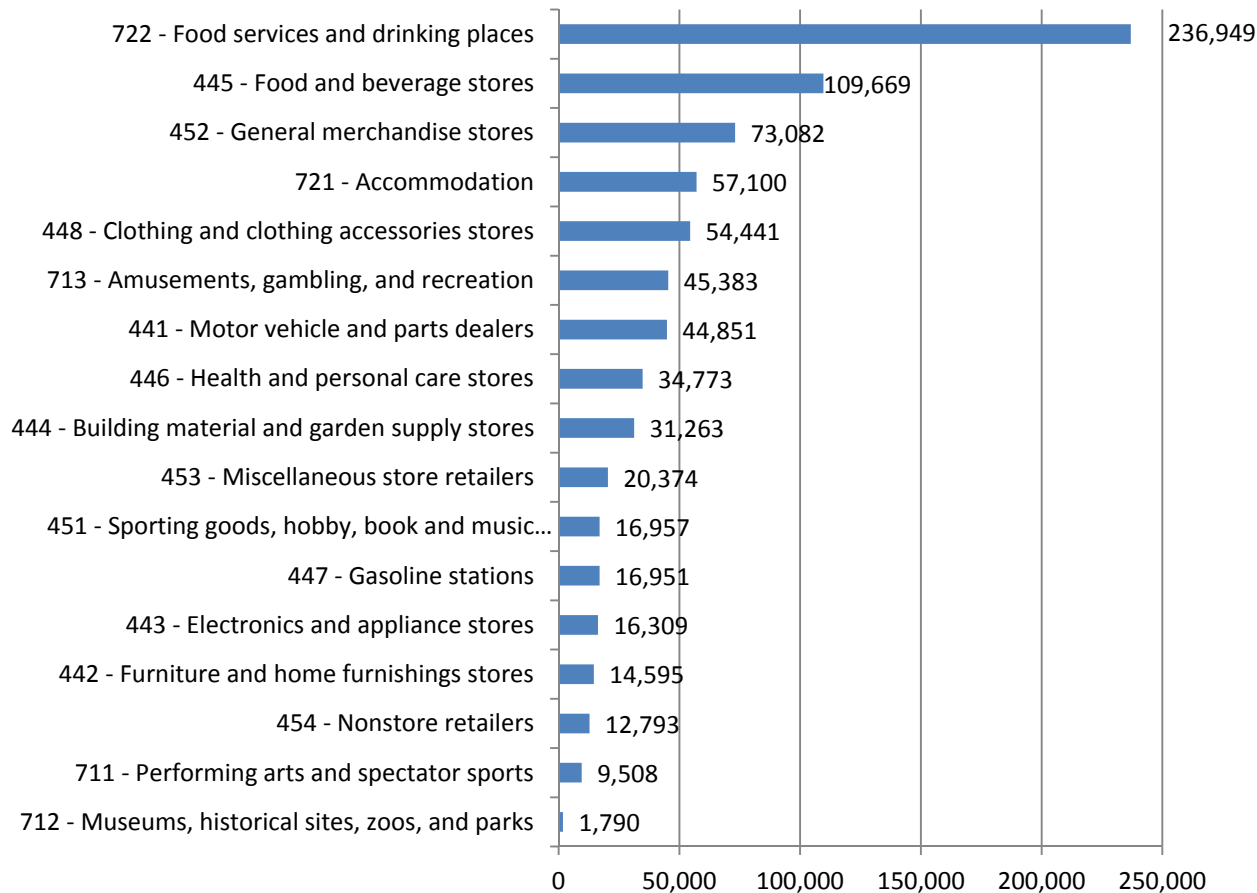
➤ Food Services/Drinking Places, which accounted for 29.7 percent of the cluster's employment in 2013, is dominated by restaurants and other eating places, which represent over three quarters (84.1%) of its employment.

➤ Accommodations, which represents just 7.2 percent of the cluster's employment, would be an even smaller portion were it not for the existence of legalized gambling in Atlantic City. The city's hotel casinos employed an average of 30,193 in 2013; more than the other 1,348 Accommodations establishments in the NJ combined.

# “Food” plays a significant role in the LHR industry cluster



**NJ LHR 2013 Employment by 3-digit NAICS**



- “Restaurants” are the primary component of the top-ranked “Food Services/Drinking Places” and “Food Stores” is a distant but still significant second place.
- Of the 17 three-digit industries within the LHR cluster, these two accounted for over 43 percent of all the jobs.
- Food Services/Drinking Places accounted for 29.7 percent of the cluster’s total employment in 2013 with another 13.8 percent in Food Stores.

Source: NJLWD, Quarterly Census of Employment and Wages  
 Prepared by: New Jersey Department of Labor and Workforce Development, November 2014



# Inside Food Stores...



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- In the Food Stores industry, supermarkets and other grocery stores (except convenience stores) accounted for nearly three of every four (72.6%) jobs, 74.9 percent of the total wages paid and more than one third (36.4%) of the establishments.



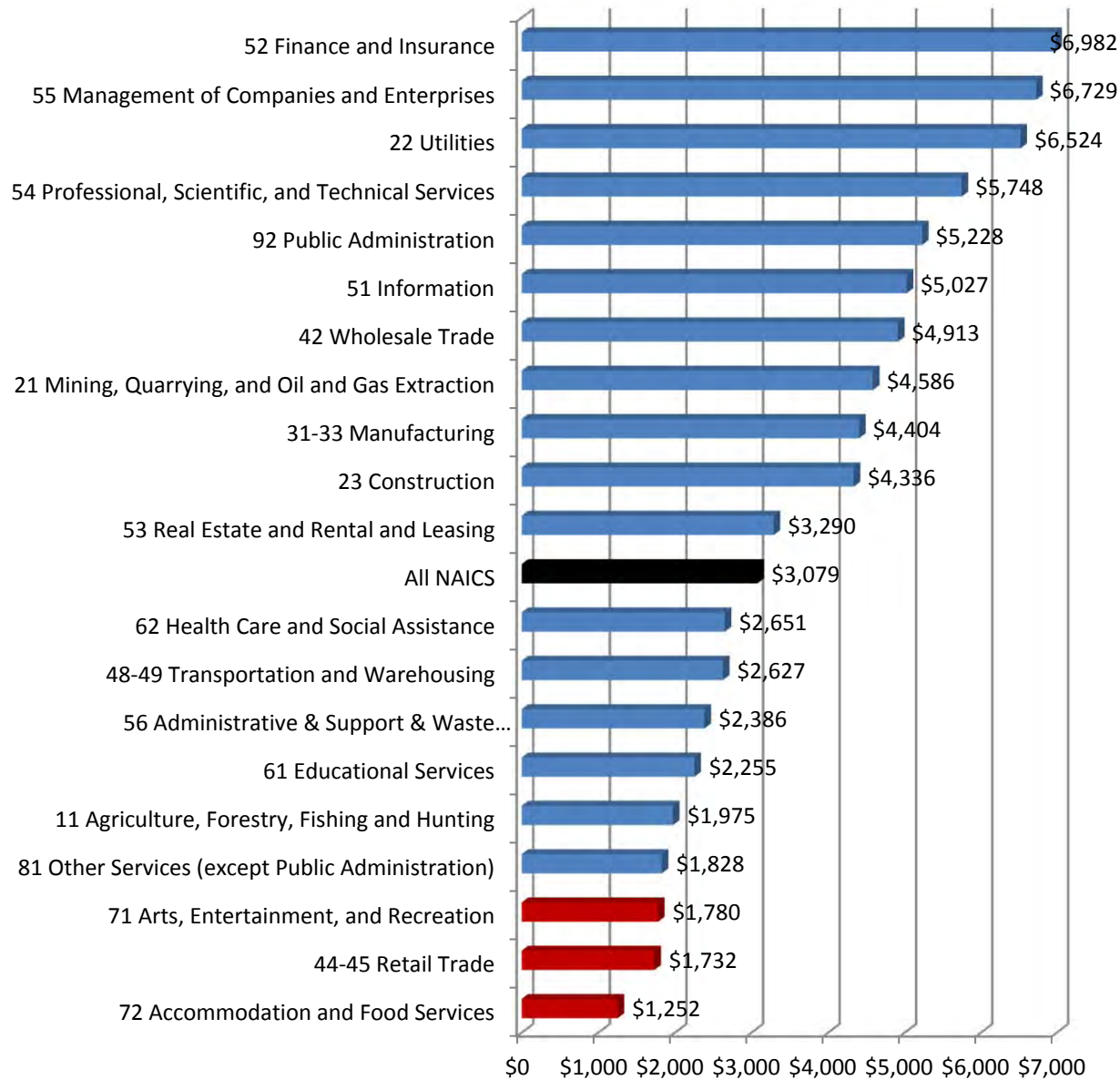
- In terms of employment, Convenience Stores and Beer, Wine and Liquor Stores round out the top three accounting for about 10.4 and 8.7 percent of the Food Stores total, respectively.
- The 2013 average annual wage of those employed in the Food Stores industry was \$24,527, which was 89.1 percent of the LHR cluster's average wage (\$27,516) but just 41.6 percent of the state's private sector average wage (\$59,026). Supermarkets and Other Grocery Stores, the largest segment of Food Stores, posted a 2013 annual average wage of \$25,302.

# Local Employment Dynamics (LED)

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- The LED Program at the Census Bureau, together with its state partners (including the New Jersey Department of Labor and Workforce Development), provides new information - the Quarterly Workforce Indicators (QWI) - on Local Employment Dynamics that is: local at the county and sub county level - so that decisions can be made in the right context.
- Information on Employment for workers in different industries and different age and sex groups - so that you know where the jobs are - together with earnings - so you know what people are getting paid.
- Also provides dynamic information on the rapidly changing economy - with information on where jobs are being created and destroyed, how much turnover there is in each industry together with long-term trends.

## Greatest average monthly earnings for new hires: (Two-Digit NAICS: 2013Q1 to 2013Q4, averaged)



➤ Due to the lower-paying nature of the jobs within the industry cluster, the bottom-ranked (18<sup>th</sup>, 19<sup>th</sup> and last) of all 20 industries are leisure, hospitality and retail-related.

➤ The annual wage for Accommodations may actually be lower were it not for the hotel casino industry's greater proportion of higher paying jobs compared to similar non-gaming establishments.

Per LED Extraction tool: Average monthly earnings of newly stable employees in statewide private firms (i.e., full-quarter employees who were new hires with a firm in the previous quarter).

Source: QWI Explorer application,  
U.S. Census Bureau,  
Local Employment Dynamics

## Lowest Average Monthly Earnings (3-digit NAICS):

<b>All NAICS subsectors</b>	<b>\$5,089</b>
722 Food Services and Drinking Places	\$1,605
452 General Merchandise Stores	\$1,855
713 Amusement, Gambling & Recreation Industries	\$1,864
812 Personal and Laundry Services	\$2,000
485 Transit and Ground Passenger Transportation	\$2,228
448 Clothing and Clothing Accessories Stores	\$2,229
712 Museums, Historical Sites, and Similar Institutions	\$2,233
445 Food and Beverage Stores	\$2,236
624 Social Assistance	\$2,241
447 Gasoline Stations	\$2,434
453 Miscellaneous Store Retailers	\$2,500
115 Support Activities for Agriculture and Forestry	\$2,505
814 Private Households	\$2,507
512 Motion Picture and Sound Recording Industries	\$2,550
111 Crop Production	\$2,671
112 Animal Production	\$2,711
623 Nursing and Residential Care Facilities	\$2,793
721 Accommodation	\$2,869
315 Apparel Manufacturing	\$3,188
487 Scenic and Sightseeing Transportation	\$3,205
446 Health and Personal Care Stores	\$3,222

➤ Based on three-digit Local Employment Dynamics (LED) data from the US Census Bureau, the **top three** and **ten of the 22 lowest (red) of all industries** by average monthly wages fall within the Leisure, Hospitality and Retail industry cluster. Two other industries (**purple**) are considered “tourism-related”

➤ Additionally, the lowest paid of these industry subsectors, “Food Services & Drinking Places”, is the one that has been growing the most and is projected to grow the most.

Per LED extraction tool: 2013Q1 to 2013Q4 (\$) averaged, Average monthly earnings of employees with stable jobs (i.e., worked with the same firm throughout the quarter).  
NJ Private Firms Only

Source: QWI Explorer application ,  
U.S. Census Bureau,  
Local Employment Dynamics

# Employee Distribution

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- The following graphs illustrate the statewide workforce characteristics by age and sex for the three LHR industry components:

NAICS 44-45 Retail

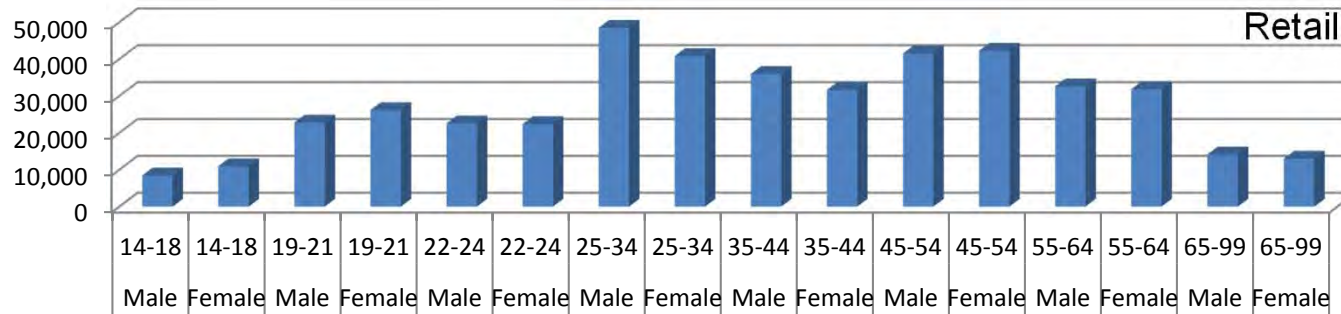
NAICS 71 Arts, Entertainment & Recreation

NAICS 72 Accommodation and Food Services

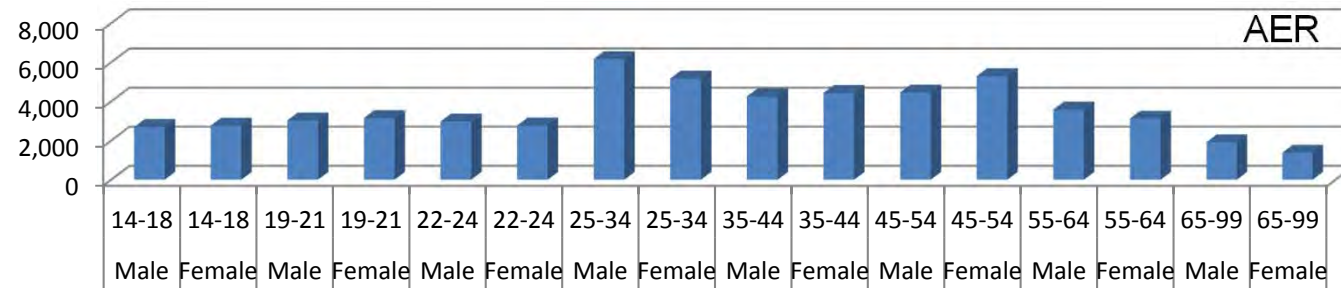
# Employee Distribution by Age and Sex: Statewide

Industries: NAICS 44-45, 71 & 72

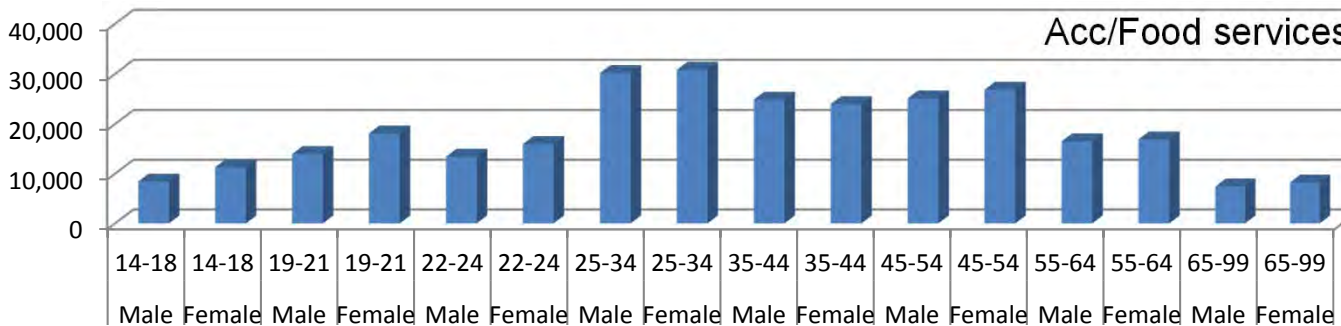
Date = 20131Q to 20134Q, Private Firms Only



Ages 25 to 34 lead the male workforce composition of all three industries.



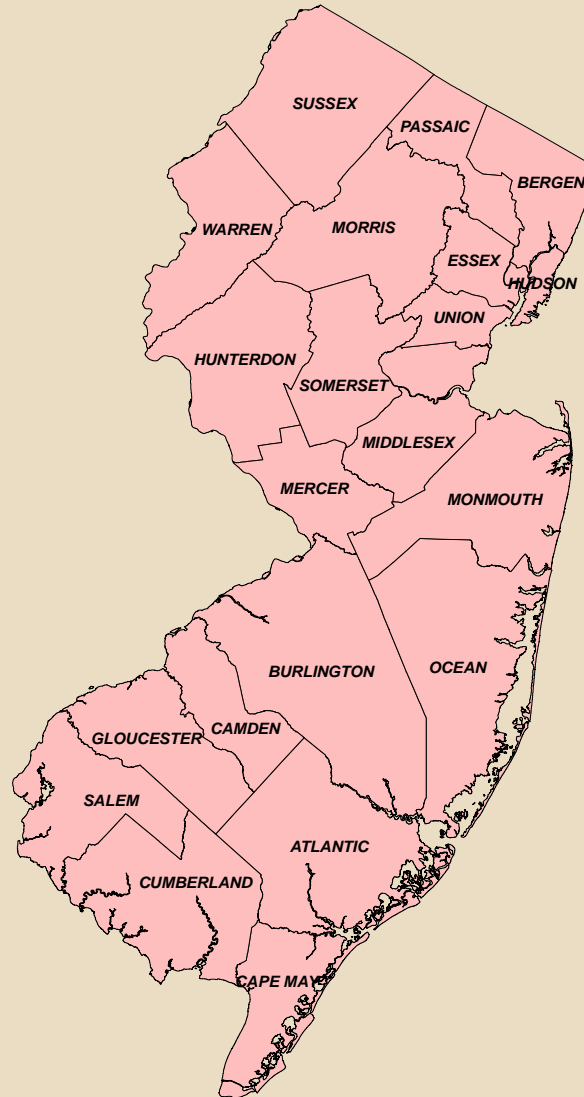
45-54 year old females have the largest percentage in the retail and arts, entertainment & recreation workforce while in accommodation and food services, 25 to 34 has the largest make-up.



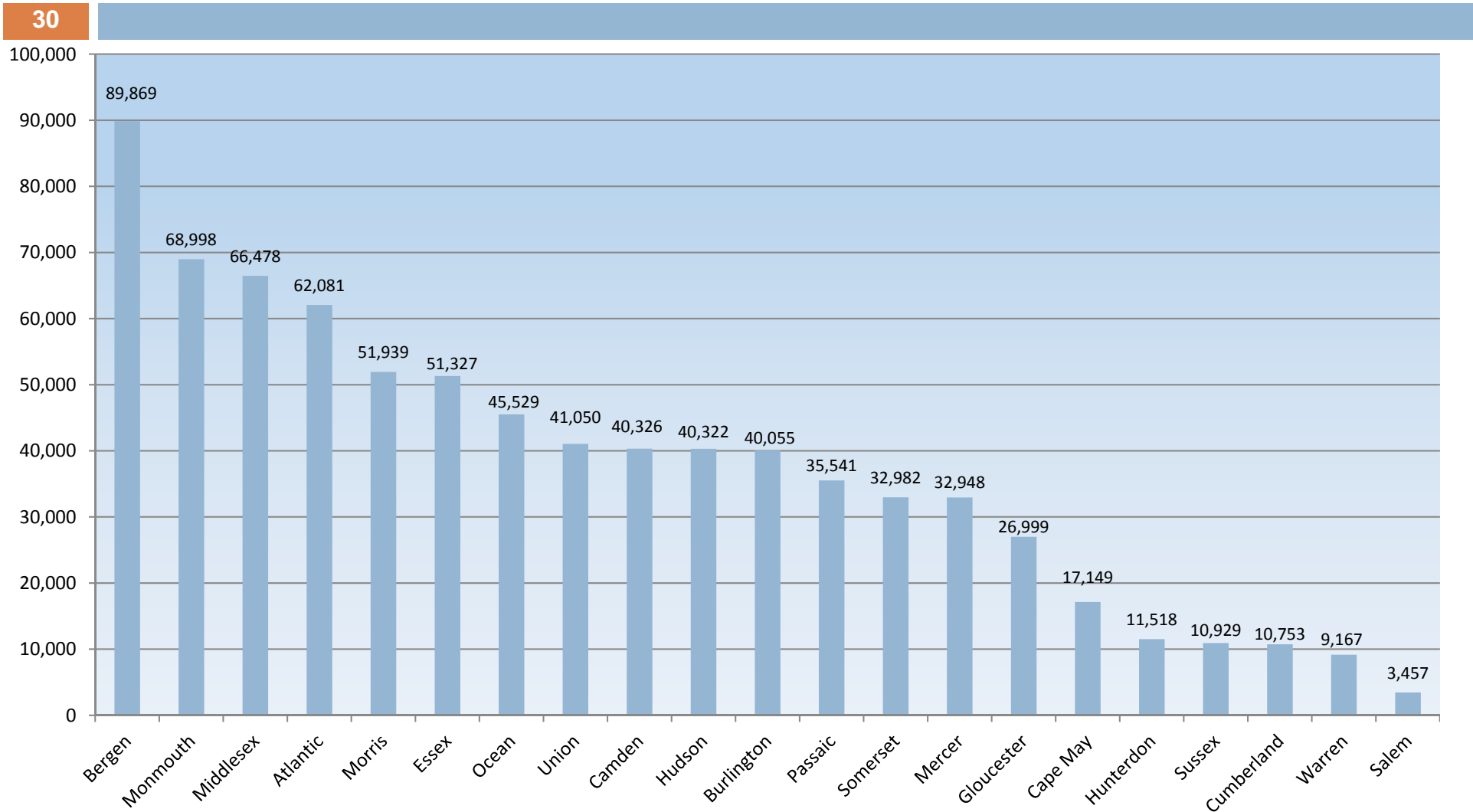
Source: QWI Explorer application, U.S. Census Bureau, Local Employment Dynamics

# County-wide LHR data: A view at a more local level

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# 2013 Annual Average QCEW (LHR) Employment by County



Source: NJLWD, Quarterly Census of Employment & Wages, Annual Averages  
Prepared by: New Jersey Department of Labor and Workforce Development, November 2014

## 2013 Quarterly Census of Employment & Wages (QCEW) Leisure, Hospitality & Retail (LHR) by Percentage of Total Employment

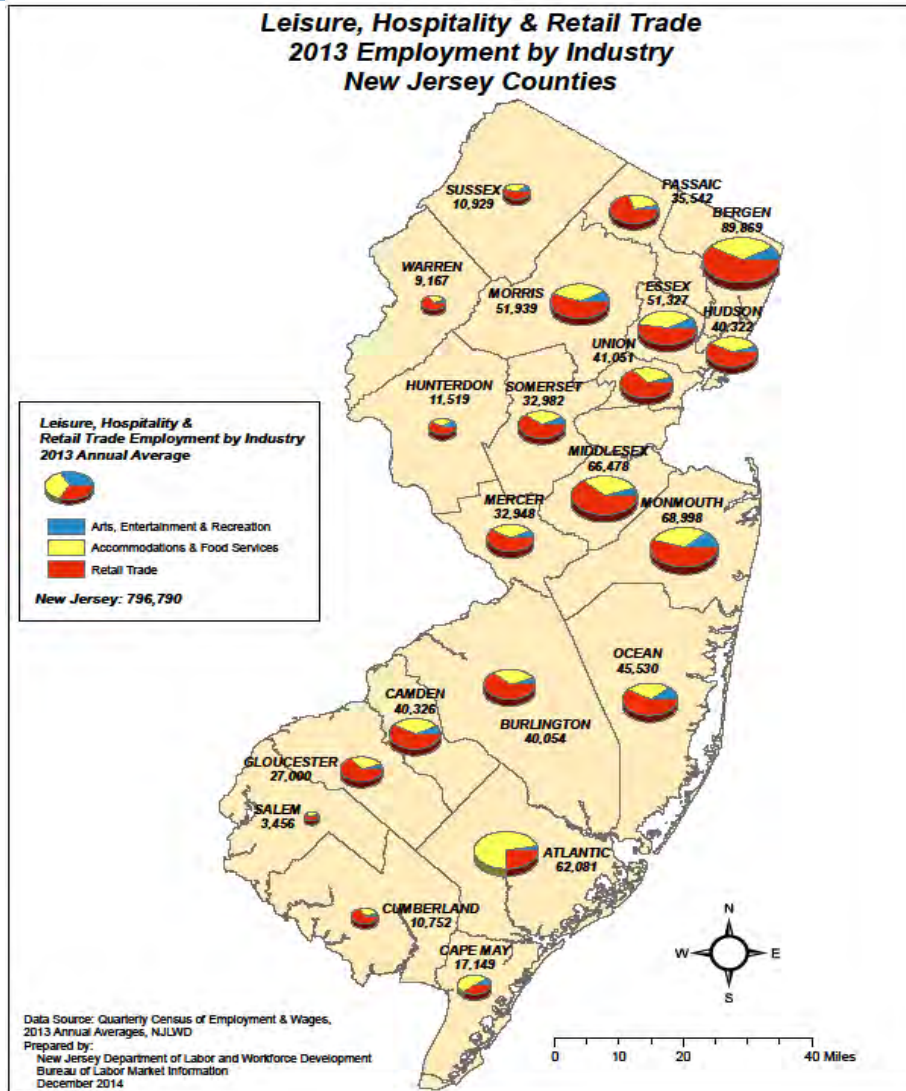
County	Units	Average Annual		Total Wages	LHR % of Total	
		Employment	Wages		Units	Employment
Atlantic	2,028	62,081	\$27,750	\$1,722,759,791	32.6%	56.1%
Cape May	1,682	17,149	22,709	389,436,903	45.0%	54.6%
Ocean	2,985	45,530	23,413	1,066,013,295	25.2%	35.9%
Sussex	753	10,929	22,154	242,122,210	22.6%	35.5%
Gloucester	1,472	27,000	24,282	655,622,408	25.4%	33.8%
Monmouth	4,655	68,998	24,237	1,672,305,309	24.4%	32.8%
Warren	664	9,167	22,199	203,500,440	24.8%	32.4%
Hunterdon	883	11,519	25,981	299,280,564	22.2%	29.3%
Passaic	2,933	35,542	25,214	896,155,950	25.0%	25.4%
Camden	2,748	40,326	25,973	1,047,371,998	24.3%	24.9%
<b>STATEWIDE</b>	<b>54,152</b>	<b>796,790</b>	<b>27,516</b>	<b>21,924,594,743</b>	<b>21.6%</b>	<b>24.6%</b>
Burlington	2,434	40,054	24,770	992,121,282	23.4%	23.7%
Cumberland	787	10,752	21,777	234,146,516	27.0%	23.7%
Bergen	6,142	89,869	31,156	2,799,944,181	19.5%	23.3%
Union	3,219	41,051	26,323	1,080,590,621	23.4%	21.6%
Morris	3,303	51,939	35,690	1,853,698,349	20.1%	21.0%
Somerset	1,892	32,982	30,353	1,001,113,733	19.6%	20.7%
Hudson	3,434	40,322	28,968	1,168,029,540	25.5%	20.5%
Salem	282	3,456	19,036	65,789,255	24.7%	20.4%
Mercer	2,187	32,948	24,210	797,657,107	20.9%	20.1%
Middlesex	4,250	66,478	26,848	1,784,809,401	20.3%	19.9%
Essex	4,414	51,327	27,714	1,422,479,631	22.7%	19.7%

Due primarily to their tourism-based economies, over one-half of Atlantic (56.1%) and Cape May (54.6%) counties' 2013 total private employment is concentrated in the LHR cluster while the state's is almost one-quarter (24.6%).

Three counties had annual average wages over \$30,000 while the state averaged \$27,516 in LHR:

Morris - \$35,690  
Bergen - \$31,156  
Somerset - \$30,353

# LHR Employment by Industry: 2013

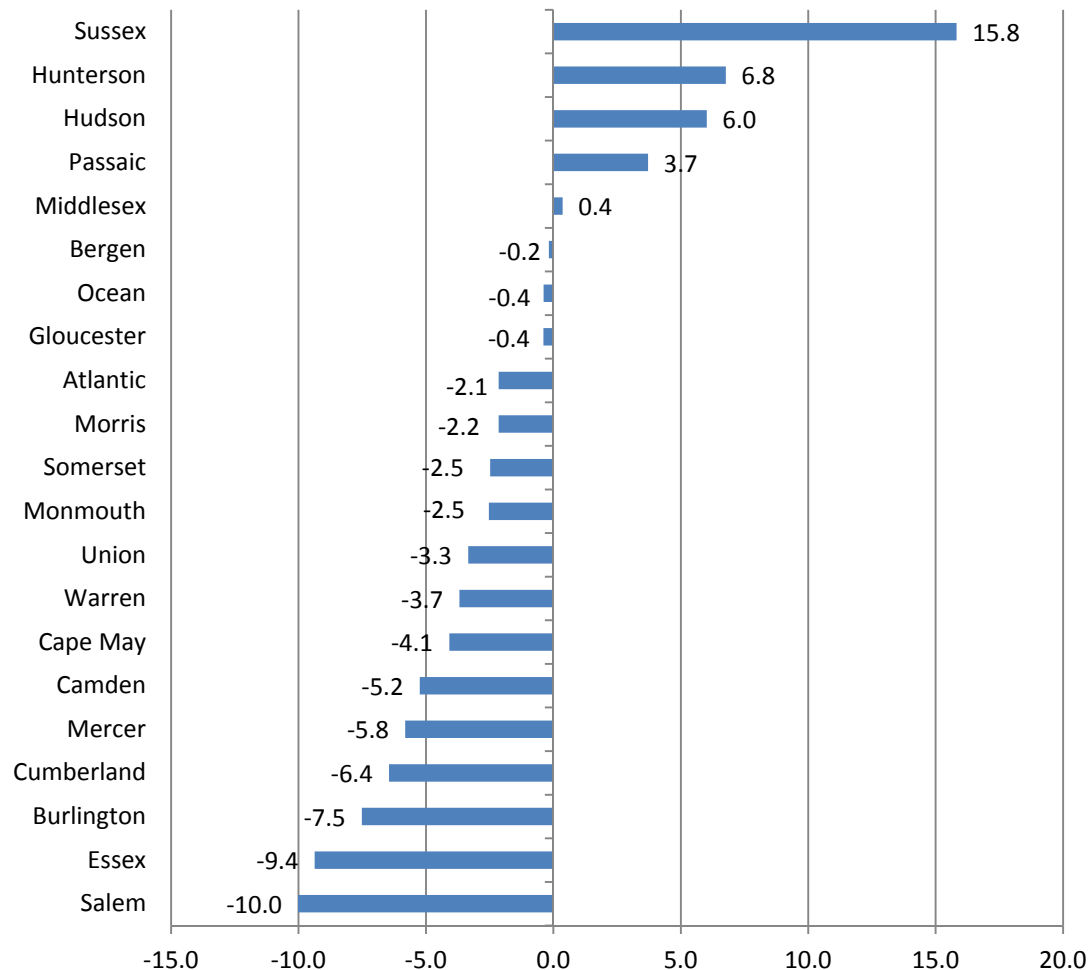


Over one-quarter (28.3%) of all employment in the LHR cluster is concentrated in three counties: Bergen; Monmouth and Middlesex.

Atlantic County ranks fourth for LHR employment due mainly to the presence of its casino hotel industry.

## Retail Employment Gains/Losses: 2008 - 2013 by County (Percent)

33



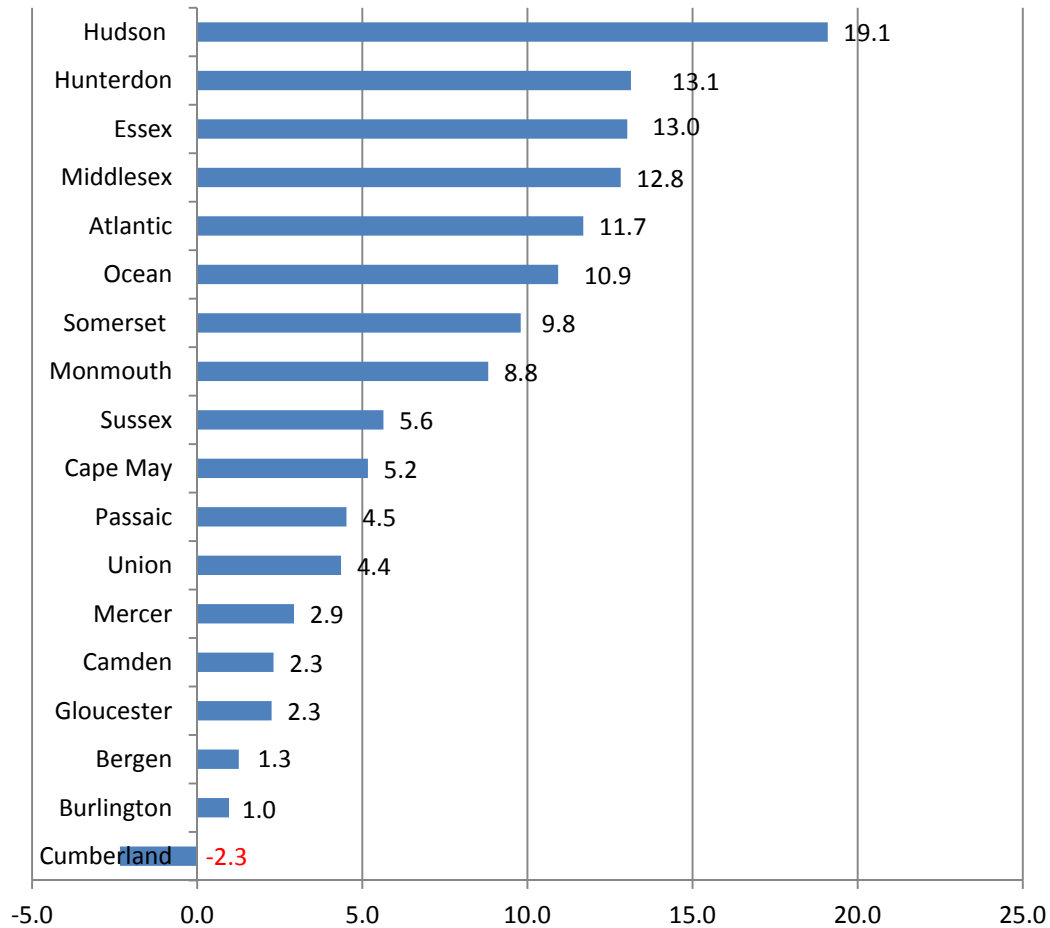
The graph ranks the state's counties by their percent rise/drop in retail trade employment.

As previously noted, the primary component, Retail Trade, recorded the LHR cluster's greatest employment decline from 2008-to-2013 (-9,050).

Sixteen of the state's 21 counties recorded a drop in retail employment over this five-year period.

Source: NJLWD, Quarterly Census of Employment & Wages, Annual Averages  
Prepared by: New Jersey Department of Labor and Workforce Development  
December 2014

# Food Service and Drinking Places Employment Gains/Losses: 2008 - 2013 by County (Percent)



Food Services/Drinking Places was the LHR component with the greatest employment gain from 2008-to-2013 (16,260).

The last national recession had some impact on consumer discretionary spending which impacted statewide employment in Food Services/Drinking Places. This industry constantly added to its annual payrolls since at least 2004 *except for the 2008 to 2009 period.*

In general, this industry also experiences a high degree of business openings and closings regardless of the economic conditions.

Note: Morris, Warren & Salem data are suppressed due to employer confidentiality issues  
 Source: NJLWD, Quarterly Census of Employment & Wages, Annual Averages  
 Prepared by: New Jersey Department of Labor and Workforce Development, December 2014

# LHR Employment & Population: 2013

## Number of Residents Per LHR Job

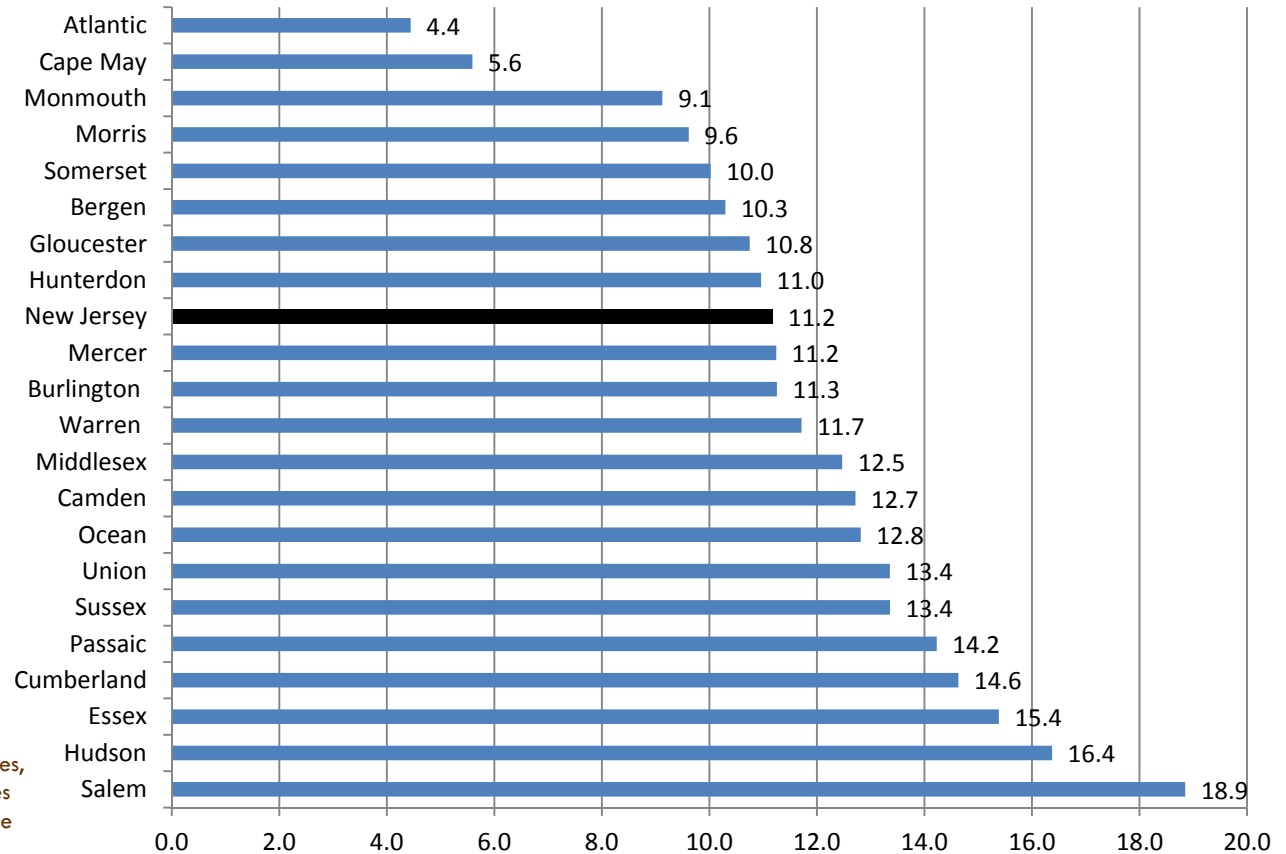
35

➤ While it is generally true that the distribution of Retail Trade employment across the state's 21 counties is likely to correlate to their resident population count, adding Leisure & Hospitality to the mix can in some cases take the distribution of the cluster's employment by county in a different direction.

➤ In addition to the distribution of LHR employment by county, it also may be useful to rank the state's counties by number of residents per LHR job. The lower the number, the greater the concentration of LHR jobs per capita. For example, in top-ranked Atlantic County, there was one LHR job for every 4.4 county residents in 2013.

➤ The most notable examples are the tourism dependent counties of Atlantic and Cape May, which rank one and two in number of LHR jobs on a per capita basis.

NJ Counties: Number of Residents Per LHR Job in 2013



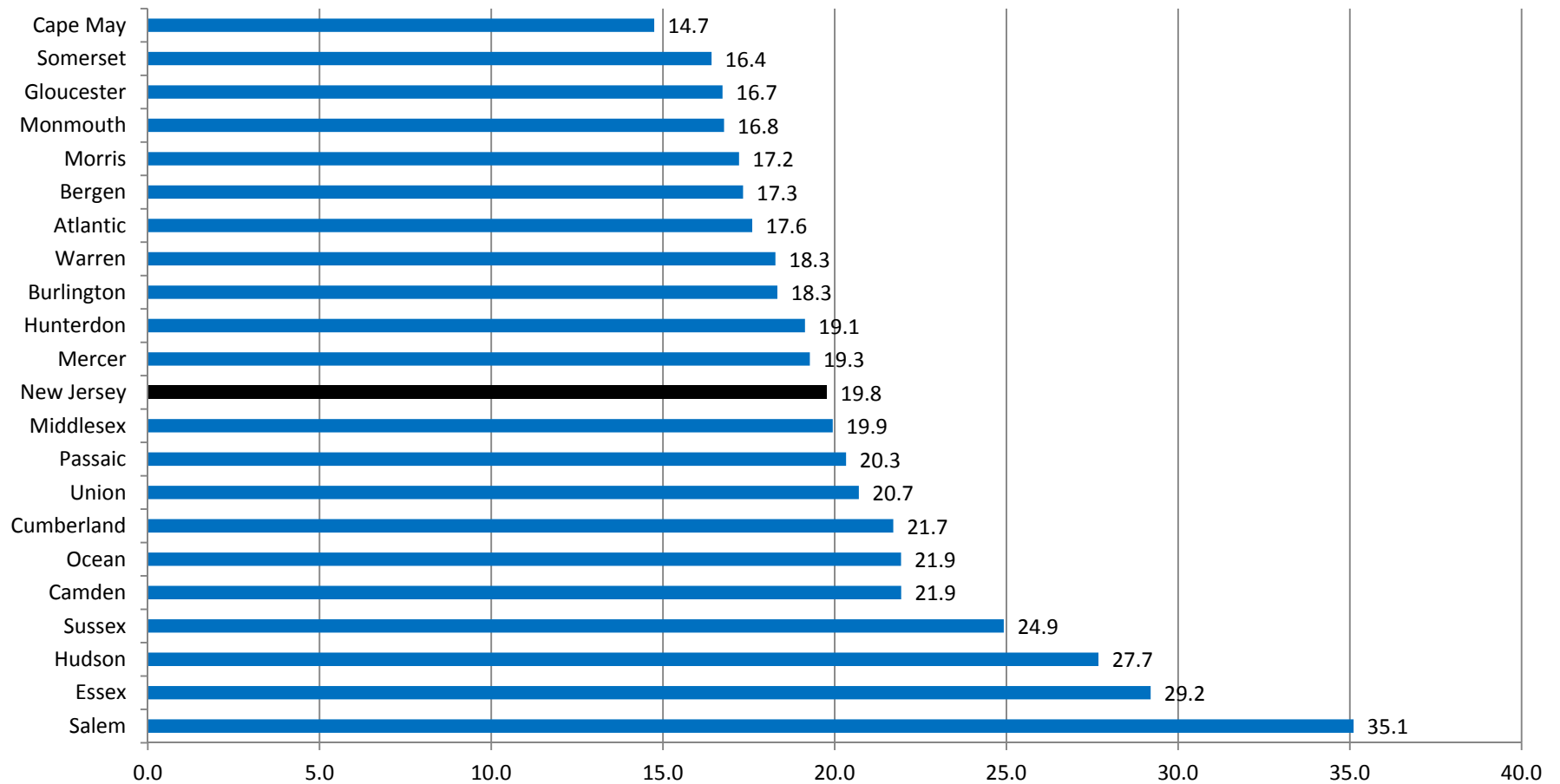
Source: NJLWD, US Census Bureau, 2013 Population Estimates, Quarterly Census of Employment & Wages, Annual Averages  
 Prepared by: New Jersey Department of Labor & Workforce Development, November 2014

# NAICS 44-45 Employment & Population: 2013

## Number of County Residents Per RETAIL Job

36

NJ Counties: Number of Residents Per **RETAIL** Job in 2013



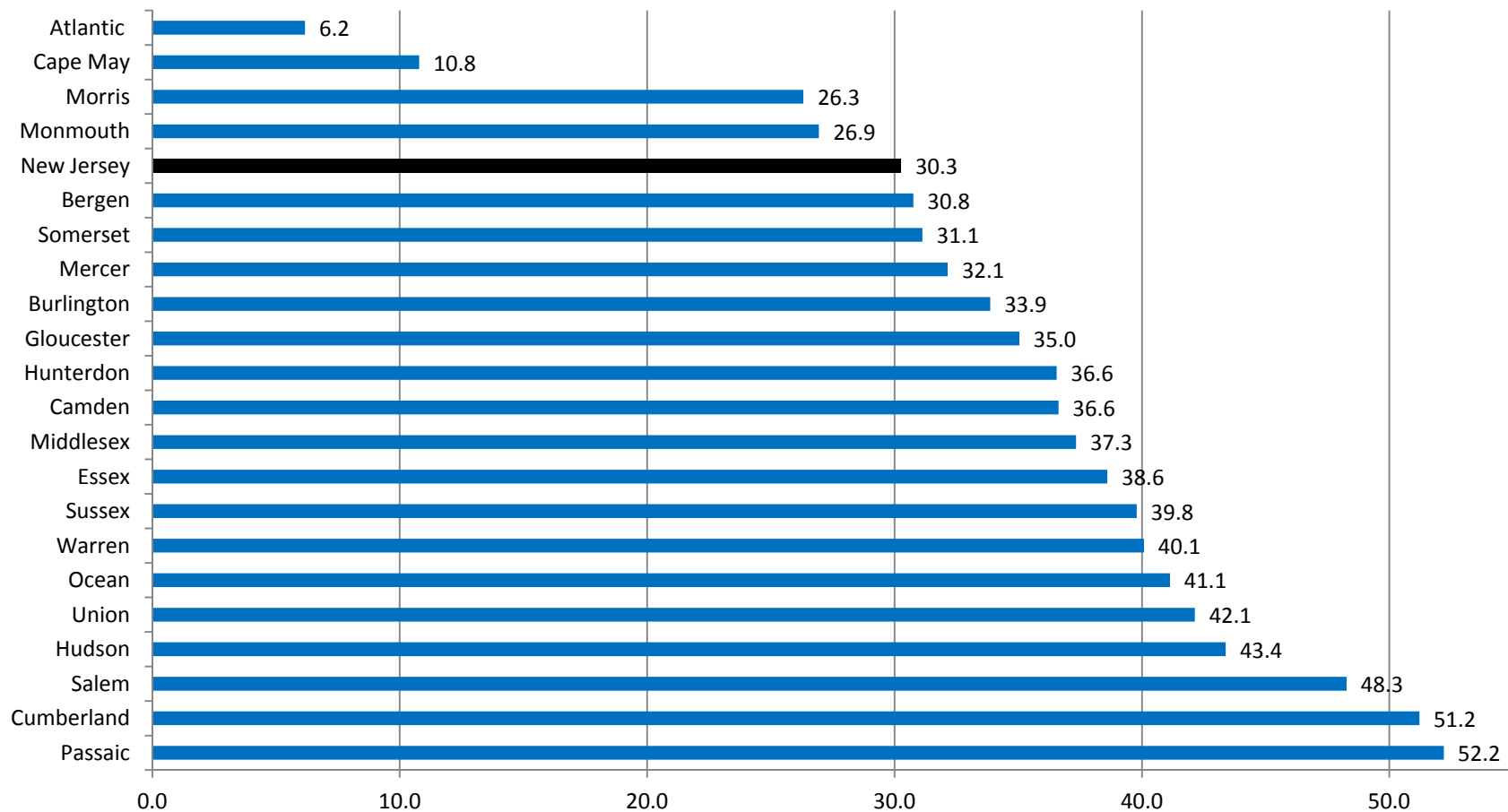
Source: NJLWD, US Census Bureau, 2013 Population Estimates, Quarterly Census of Employment & Wages, Annual Averages,  
Prepared by: New Jersey Department of Labor and Workforce Development, November 2014

# NAICS 72 Employment & Population: 2013

## Number of Residents Per Accommodation & Food Services Job

37

NJ Counties: Number of Residents Per **ACCOMMODATION & FOOD SERVICES** Job in 2013



Source: NJLWD, US Census Bureau, 2013 Population Estimates, Quarterly Census of Employment & Wages, Annual Averages,  
Prepared by: New Jersey Department of Labor and Workforce Development, November 2014

## NJ's Top Leisure, Hospitality & Retail Employers

<u>All Employers' Rank</u>		<u>NJ 2014 Employment</u>
1	Wakefern Food Corp.	40,000
2	Wal-Mart Stores	18,593
7	The Great Atlantic & Pacific Tea Co. (A&P)	12,373
8	The Home Depot	12,100
9	Caesar's Entertainment	11,804
13	Wawa, Inc.	8,609
14	The Stop & Shop Supermarket Co.	8,567
15	Target Corp.	8,467
16	CVS Caremark	8,400
21	Macy's	7,400
22	Lowe's Companies Inc.	6,528
24	Bed Bath & Beyond	6,000
26	Borgata Hotel Casino & Spa	5,824
28	Aramark	5,677
32	Rite-Aid	5,000
35	ACME Markets	4,837
36	Costco Wholesale	4,534
39	Six Flags Great Adventure	4,100

Source: New Jersey Business magazine, August 2014 edition

## Top Employers in LHR

- According to New Jersey Business magazine's Top Employers in 2014, five of New Jersey's top ten largest employers fall within leisure, hospitality and retail trade.
- Overall, these 20 employers account for about one of every four to five jobs (22.4%) in the state's LHR industry cluster.



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## Detailed Industry Occupational Analysis

# New Jersey Resident 2013 Workforce Characteristics: Occupations All Industries in NJ vs. LHR

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➤ The cluster had a higher proportion in only **four** out of 18 occupational categories due to the defined nature of the industry components' type of work.

➤ For example, "Food preparation & service" is mainly in Food Services/Drinking Places (*component of Leisure & Hospitality*) while "Sales/Marketing" has a significant job presence in *Retail Trade*.

<u>Characteristic By Occupation</u>	All Percent	LHR Percent
Management/Business/Financial	16.0%	8.2%
Scientist/Engineer	5.9%	0.8%
Community/Social services	1.4%	0.1%
Legal services	1.3%	0.1%
Education/Training/Library worker	6.5%	0.4%
Arts/Entertainment	1.9%	2.7%
Health care	7.7%	2.2%
Protective	2.4%	1.4%
Food preparation & service	4.8%	21.5%
Cleaning/Maintenance	3.8%	3.2%
Personal Care	3.8%	4.5%
Sales/Marketing	11.3%	33.3%
Administrative support	13.3%	11.3%
Farming/Fishing/Forestry	0.2%	0.0%
Construction/Extraction	4.6%	0.3%
Installation/Repair	2.7%	1.9%
Production	4.1%	2.1%
Transportation/Material moving	6.7%	6.1%
Military/Never worked	1.7%	N/A

Source: U.S. Census Bureau 2013 American Community Survey  
Public Use Micro-data Sample (5% Sample)

<u>LHR Occupations</u>	<u>2013 Employment</u>	<u>Share of Industry</u>	<u>Minimum Education Requirements</u>
Total ALL Occupations in LHR	800,741	100.0%	
Top 20 Occupations in LHR	577,033	72.1%	
Retail Salespersons	118,648	14.8%	Less than high school
Cashiers	97,024	12.1%	Less than high school
Waiters and Waitresses	59,671	7.5%	Less than high school
Combined Food Preparation and Serving Workers, Including Fast Food	57,263	7.2%	Less than high school
Stock Clerks and Order Fillers	47,170	5.9%	Less than high school
First-Line Supervisors/Managers of Retail Sales Workers	28,739	3.6%	High school diploma or equivalent
Food Preparation Workers	19,868	2.5%	Less than high school
First-Line Supervisors/Managers of Food Preparation and Serving Workers	19,407	2.4%	High school diploma or equivalent
Cooks, Restaurant	19,144	2.4%	Less than high school
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	15,722	2.0%	Less than high school
Bartenders	14,872	1.9%	Less than high school
Customer Service Representatives	9,665	1.2%	High school diploma or equivalent
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	9,280	1.2%	Less than high school
Service Station Attendants	9,067	1.1%	Less than high school
Maids and Housekeeping Cleaners	8,911	1.1%	Less than high school
Automotive Service Technicians and Mechanics	8,806	1.1%	High school diploma or equivalent
Cooks, Fast Food	8,775	1.1%	Less than high school
Office Clerks, General	8,444	1.1%	High school diploma or equivalent
Dishwashers	8,347	1.0%	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	8,210	1.0%	Less than high school

➤ Fifteen of the top 20 occupations within LHR require the minimum education of “less than high school”.

Source: NJLWD, Occupational Employment Statistics Survey, May 2013

Prepared by: New Jersey Department of Labor and Workforce Development, December 2014

# Wages by Occupation



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- As might be expected, the cluster's largest occupational category, *retail salesperson*, pays wages that vary by type of industry sector. Retail salespersons within the retail trade segment has the highest annual wage (\$26,685) followed by arts, entertainment and recreation (\$25,375).
- *Retail salespersons* tended to receive the lowest wages in establishments involved with accommodations and food services (\$23,225).
- Wages paid to *cashiers*, the cluster's second largest group, tended to fall within a narrow range between the three industry sectors (NAICS 44-45, 71 & 72) that for a full-time, year-round employee would usually amount to, \$19,490 - \$20,735.
- To the extent that tip income is reported accurately, *waiters/waitresses* (3rd largest occupation) do somewhat better with a full-time, year-round worker earning wages in the \$21,680 (NAICS 72) - \$26,720 (NAICS 71) range.

# Wages by Occupation



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- Wages paid to *combined food preparation and serving workers*, the cluster's fourth largest, generally paid in the \$9.10 to \$10.10 per hour range (\$18,880 - \$20,005, annual). The lower wages were similar to cashiers mainly due to entry-level, part-time, lower skill and education requirements.
- The other occupation with a significant presence in LHR is *stock clerks/order fillers*. The pay varied widely between two of its segments: 44-45 Retail Trade (\$11.25/hr. & \$23,450/yr.) and 72 Accommodation and Food Services (\$15.00/hr. & \$31,155/yr.).
- On the upper end of the pay scale, LHR occupations that pay an average of \$100,000 or more per year mostly include managers of all types as well as *pharmacists, engineers and chief executives*.

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# Demographic Characteristics of the Industry Cluster Workforce

## New Jersey Resident Workforce Demographic Characteristics

### All Industries in NJ vs. LHR: 2013

#### Age, Sex, Race & Hispanic Origin

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➤ The LHR industry cluster is characterized by a large number of seasonal and part-time jobs and by workers who are younger than the average for all industries. About one-half (48.9%) of all workers in the cluster are under 35 years old compared with nearly one-third (32.3%) for all industries.

➤ Many businesses in the cluster increase hiring during the summer, often employing high school-age and college-age workers. Some segments of the industry cluster are heavily reliant on immigrant and guest workers such as boardwalk and amusement establishments. Over 53 percent of the cluster's workforce is male and 21.7 percent Hispanic vs. 18.6 percent for all industries.

<u>By Age</u>	<u>All</u>	<u>LHR</u>
Less than 25	12.1%	27.9%
25-34	20.2%	21.0%
35-44	21.2%	16.5%
45-54	24.1%	17.4%
55-64	16.8%	12.4%
65 & over	5.6%	4.7%
<u>By Sex</u>		
Male	52.4%	53.7%
Female	47.6%	46.3%
<u>By Race</u>		
White	68.9%	67.9%
Black	12.9%	11.7%
Am. Indian/Alaska Native	0.2%	0.2%
Asian	9.3%	8.6%
Native Hawaiian/Pacific Islander	0.0%	0.0%
Some Other Races	6.8%	8.9%
Two or more races	1.9%	2.7%
<u>By Hispanic origin</u>		
Non-Hispanic	81.4%	78.3%
Hispanic	18.6%	21.7%

Source: 2013 American Community Survey Public Use Micro-data Sample (5% Sample)

## New Jersey Resident Workforce Characteristics All Industries in NJ vs. LHR: 2013 Earnings

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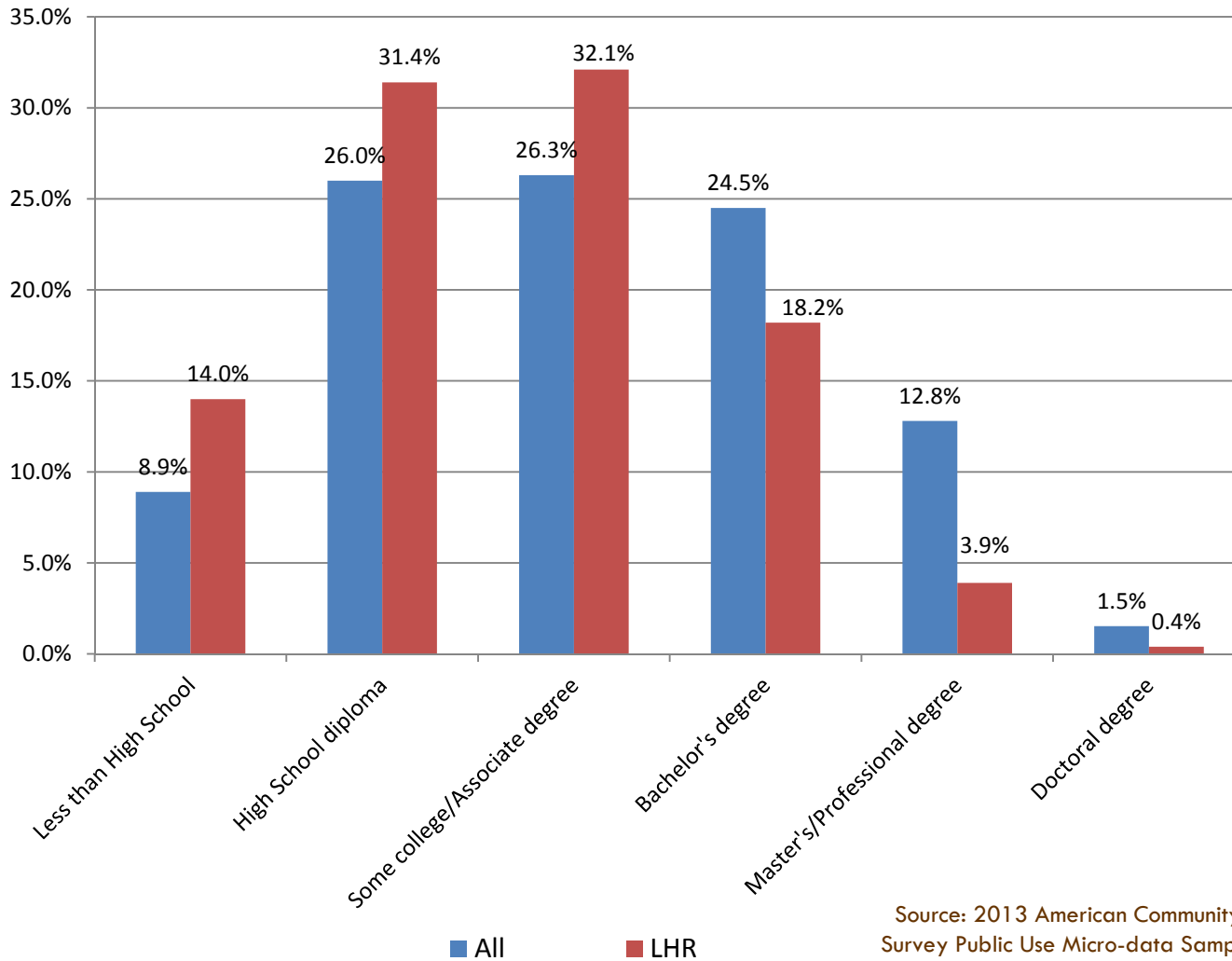
	<u>By Personal Earnings</u>	<u>All</u>	<u>LHR</u>
➤ The LHR cluster had a significantly higher proportion than “All industries” in the lowest dollar range in <i>Personal Earnings</i> : “Less than \$25,000”.	Less than \$25,000	36.6%	60.0%
	\$25,000-\$50,000	23.4%	21.9%
	\$50,000-\$75,000	17.0%	9.1%
	\$75,000-\$100,000	9.0%	3.5%
➤ This is the result of the low paying nature of the occupations in leisure, hospitality and retail industries.	\$100,000-\$150,000	8.2%	3.5%
	\$150,000-\$200,000	2.6%	0.9%
	\$200,000 & more	3.3%	1.2%

# New Jersey Resident Workforce Characteristics

## All Industries vs. LHR: 2013 Educational Attainment



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Source: 2013 American Community Survey Public Use Micro-data Sample (5% Sample)

- A greater proportion of LHR workers have achieved a lower level of education than workers overall due to its lower skilled, entry-level positions with a higher turnover rate.
- The 2013 American Community Survey states nearly 1/2 (45.4%) of the workers in this industry cluster do not have any formal education beyond high school compared with about 1/3 (34.9%) for employees in all industries statewide.

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## Outlook and Projections

➤ As for the outlook by occupation, the top five and, overall, nine (in red) of the top eleven occupations in the state with the greatest number of projected average annual job openings are LHR-related. The typical minimum requirements for these occupations are no work experience, short-term on-the-job training and no college degree.

➤ The nine occupations account for 24.7% of all average annual job openings that New Jersey is expected to add through 2022.

<u>Occupational Title</u>	<u>Employment</u>		<u>Change 2012 - 2022</u>		<u>Annual Average Job Openings</u>		
	<u>2012</u>	<u>2022</u>	<u>Number</u>	<u>Total %</u>	<u>Total</u>	<u>Growth</u>	<u>Replacement</u>
<b>Total, All Occupations</b>	<b>4,149,400</b>	<b>4,462,550</b>	<b>313,150</b>	<b>7.5</b>	<b>131,470</b>	<b>34,560</b>	<b>96,910</b>
Retail Salespersons	125,700	134,850	9,150	7.3	5,220	920	4,300
Cashiers	102,750	106,050	3,300	3.2	4,770	330	4,440
Combined Food Preparation and Serving Workers, Including Fast Food	60,000	70,200	10,200	17.0	3,310	1,020	2,290
Waiters and Waitresses	58,650	62,550	3,900	6.6	3,210	390	2,820
Laborers and Freight, Stock, and Material Movers, Hand	75,750	83,350	7,600	10.1	3,110	760	2,350
Registered Nurses	79,850	88,900	9,050	11.3	2,450	910	1,550
Customer Service Representatives	63,450	69,550	6,100	9.6	2,340	610	1,730
Home Health Aides	31,150	46,300	15,150	48.6	2,110	1,510	590
Receptionists and Information Clerks	51,150	57,850	6,700	13.0	2,040	670	1,380
Office Clerks, General	84,600	86,400	1,800	2.2	1,960	180	1,780
Stock Clerks and Order Fillers	63,400	62,450	-950	-1.5	1,920	0	1,920

Source: NJLWD Current Employment Statistics, Industry & Occupational Employment Projections , 2012-2022

New Jersey, 2012 - 2022 Projected Employment Change by Industry					
Industry Title (Two-Digit NAICS)	2012 Jobs	2022 Jobs	Change: 2012-2022		
			Number	Percent	
				Annual	Total
Total Nonfarm	4,149,400	4,462,550	313,200	0.7	7.5
Healthcare and Social Services	527,200	624,250	97,050	1.7	18.4
Professional, Scientific, and Technical Services	278,700	327,500	48,800	1.6	17.5
Construction	130,400	166,550	36,150	2.5	27.7
Retail Trade	443,600	470,850	27,250	0.6	6.1
Administrative and Support and Waste Management and Remediation Services	259,000	281,700	22,700	0.8	8.8
Accommodation and Food Services	290,400	310,650	20,250	0.7	7.0
Wholesale Trade	212,800	230,500	17,700	0.8	8.3
Transportation and Warehousing	151,600	168,750	17,150	1.1	11.3
Educational Services	93,100	108,850	15,750	1.6	16.9
Management of Companies and Enterprises	80,500	93,500	13,000	1.5	16.1
Other Services (except Government)	164,200	176,350	12,150	0.7	7.4
Finance and Insurance	197,000	206,550	9,550	0.5	4.8
Arts, Entertainment, and Recreation	55,600	61,000	5,400	0.9	9.7
Real Estate and Rental and Leasing	53,000	57,550	4,550	0.8	8.6
Utilities	13,800	14,950	1,150	0.8	8.3
Natural Resources and Mining	1,300	1,150	-150	-1.2	-11.5
Information	77,300	70,850	-6,450	-0.9	-8.3
Manufacturing	245,300	229,350	-15,950	-0.7	-6.5
Government	615,900	596,350	-19,550	-0.3	-3.2

Note: Total nonfarm employment excludes self-employed and unpaid family workers  
Percent Changes are based on unrounded data

➤ Based on official employment projections for New Jersey's industries prepared by the Department of Labor and Workforce Development, payrolls in LHR (in blue) are projected to grow by 52,900 from 2012-to-2022.

➤ The cluster's rate of job growth is slower than that projected for the state overall (6.7%, LHR vs. 7.5%, all industries).

NAICS Industry Code	Industry Title	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate	Percent Change	Outlook
0000	Total All Industries	4,149,400	4,462,550	313,200	0.7	7.5	Growing
<b>1026</b>	<b>Leisure and Hospitality</b>	<b>346,100</b>	<b>371,650</b>	<b>25,550</b>	<b>0.7</b>	<b>7.4</b>	<b>Growing</b>
<b>4400</b>	<b>Retail Trade</b>	<b>443,600</b>	<b>470,850</b>	<b>27,250</b>	<b>0.6</b>	<b>6.1</b>	<b>Growing</b>
4410	Motor Vehicle and Parts Dealers	43,800	47,700	3,900	0.9	8.9	Growing
4440	Building Material and Garden Equipment and Supplies Dealers	30,400	35,050	4,650	1.4	15.2	Growing
4450	Food and Beverage Stores	106,400	112,100	5,700	0.5	5.4	Growing
4460	Health and Personal Care Stores	35,000	38,650	3,650	1.0	10.4	Growing
4480	Clothing and Clothing Accessories Stores	55,100	59,000	3,900	0.7	7.1	Growing
4510	Sporting Goods, Hobby, Book, and Music Stores	17,200	17,400	200	0.1	1.2	Stable
4520	General Merchandise Stores	74,100	75,000	900	0.1	1.2	Stable
4590	Retail Trade, All Other	81,600	86,000	4,400	0.5	5.4	Growing
7100	Arts, Entertainment, and Recreation	55,700	61,000	5,300	0.9	9.5	Growing
7130	Amusement, Gambling, and Recreation Industries	44,500	49,150	4,650	1.0	10.5	Growing
7190	Arts, Entertainment, and Recreation, All Other	11,200	11,850	650	0.5	5.6	Growing
7200	Accommodation and Food Services	290,400	310,650	20,250	0.7	7.0	Growing
7210	Accommodation, including Hotels and Motels	58,400	52,400	-6,000	-1.1	-10.3	Declining
7220	Food Services and Drinking Places	232,000	258,300	26,300	1.1	11.3	Growing
7223	Special Food Services	28,200	29,400	1,200	0.4	4.2	Stable
7224	Drinking Places (Alcoholic Beverages)	9,400	10,000	600	0.6	6.4	Growing
7225	Restaurants and Other Eating Places	194,400	218,900	24,500	1.2	12.6	Growing

➤ Continuing the trend, food services & drinking places is projected to increase the most in Leisure and Hospitality and food and beverage stores is expected to lead Retail Trade through 2022.

➤ Accommodation, including Hotel and Motel (NAICS 721) is the only industry projected to decline. Casinos are considered accommodations.

Source: NJLWD Current Employment Statistics, Industry & Occupational Employment Projections, 2012-2022, NOTE: Employment data are rounded to the nearest hundred. Percentages and percent changes are based on unrounded data  
 Prepared by: New Jersey Department of Labor and Workforce Development, Workforce Research & Analytics .

# Outlook



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- As it did during the 2008-to-2013 period, the Foods Services/Drinking Places component is projected to continue creating the greatest number of new jobs (26,300) from 2012-to-2022. This 11.3 percent increase is more than the state's projected rate (7.5%).
- The cluster's largest component, Retail Trade with 56 percent of employment, is projected to grow by 27,250 jobs or 6.1 percent during this 10-year period, while Arts/Entertainment/Recreation is projected to add 5,300 new jobs for a 9.5 percent advance.



# Southern Region Industry Projections: Retail Trade

<u>County</u>	<b>2012 Estimated Employment</b>	<b>2022 Projected Employment</b>	<b>Numeric Change</b>	<b>Annual Growth Rate (%)</b>	<b>Total Percent Change</b>	<b>Outlook</b>
Atlantic	15,750	16,700	950	0.6	5.9	Growing
Burlington	24,800	26,250	1,450	0.6	5.9	Growing
Camden	23,800	24,600	800	0.3	3.4	Stable
Cape May	6,450	6,750	250	0.4	4.1	Stable
Cumberland	7,400	7,750	350	0.5	4.7	Stable
Gloucester	17,550	17,950	400	0.2	2.2	Stable
Salem	1,900	2,000	100	0.6	5.9	Growing

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

# Southern Region Industry Projections: Accommodations & Food Services

<u>County</u>	<u>2012 Estimated Employment</u>	<u>2022 Projected Employment</u>	<u>Numeric Change</u>	<u>Annual Growth Rate (%)</u>	<u>Total Percent Change</u>	<u>Outlook</u>
Atlantic	46,250	43,050	-3,200	-0.7	-6.9	Declining
Burlington	13,500	14,200	750	0.5	5.4	Growing
Camden	14,300	15,750	1,500	1.0	10.4	Growing
Cape May	9,050	9,150	100	0.1	1	Stable
Cumberland	3,200	3,250	50	0.2	1.9	Stable
Gloucester	8,100	8,950	850	1	10.4	Growing
Salem	1,350	1,400	50	0.4	4.1	Stable

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

# Central Region Industry Projections: Retail Trade

<u>County</u>	<u>2012 Estimated Employment</u>	<u>2022 Projected Employment</u>	<u>Numeric Change</u>	<u>Annual Growth Rate (%)</u>	<u>Total Percent Change</u>	<u>Outlook</u>
Mercer	19,100	20,600	1,500	0.8	7.9	Growing
Middlesex	40,950	43,700	2,750	0.7	6.7	Growing
Monmouth	37,850	40,050	2,250	0.6	5.9	Growing
Ocean	26,350	27,650	1,300	0.5	4.9	Stable
Somerset	19,950	22,100	2,150	1.0	10.7	Growing

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

## Central Region Industry Projections: Accommodations & Food Services

<u>County</u>	<u>2012 Estimated Employment</u>	<u>2022 Projected Employment</u>	<u>Numeric Change</u>	<u>Annual Growth Rate (%)</u>	<u>Total Percent Change</u>	<u>Outlook</u>
Mercer	10,850	11,600	750	0.7	7.1	Growing
Middlesex	21,450	24,750	3,300	1.4	15.4	Growing
Monmouth	23,200	25,350	2,150	0.9	9.2	Growing
Ocean	14,000	15,050	1,050	0.7	7.4	Growing
Somerset	10,650	11,450	800	0.7	7.4	Growing

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

# Northern Region Industry Projections: Retail Trade

<u>County</u>	<u>2012 Estimated Employment</u>	<u>2022 Projected Employment</u>	<u>Numeric Change</u>	<u>Annual Growth Rate (%)</u>	<u>Total Percent Change</u>	<u>Outlook</u>
Bergen	53,000	58,250	5,250	0.9	9.9	Growing
Essex	27,000	27,350	300	0.1	1.2	Stable
Hudson	23,250	25,400	2,200	0.9	9.4	Growing
Hunterdon	6,600	6,800	200	0.3	3.2	Stable
Morris	29,050	30,550	1,500	0.5	5.2	Growing
Passaic	24,500	25,950	1,450	0.6	5.9	Growing
Sussex	5,900	6,250	350	0.6	5.9	Growing
Union	26,350	27,750	1,400	0.5	5.3	Growing
Warren	6,150	6,500	350	0.6	5.9	Growing

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

# Northern Region Industry Projections: Accommodations & Food Services

<u>County</u>	<u>2012 Estimated Employment</u>	<u>2022 Projected Employment</u>	<u>Numeric Change</u>	<u>Annual Growth Rate (%)</u>	<u>Total Percent Change</u>	<u>Outlook</u>
Bergen	29,050	32,800	3,750	1.2	12.9	Growing
Essex	20,300	22,400	2,050	1.0	10.1	Growing
Hudson	14,700	17,100	2,400	1.5	16.3	Growing
Hunterdon	3,450	4,000	550	1.5	16.4	Growing
Morris	17,750	19,100	1,300	0.7	7.4	Growing
Passaic	10,000	10,550	550	0.5	5.6	Growing
Sussex	3,700	3,850	150	0.4	3.7	Stable
Union	13,000	14,200	1,250	0.9	9.5	Growing
Warren	2,550	2,700	100	0.5	4.7	Stable

Source: NJLWD, New Jersey Industry and Occupational Projections, 2012-2022  
Prepared by: New Jersey Department of Labor and Workforce Development December 2014

# Outlook



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- Along with other service sectors such as the hospitality industry, retail is a critical point of entry, or “gateway,” into the labor force and provides workers with foundational skills in customer service, punctuality, and responsibility.



- The retail industry offers substantial employment opportunities. Part-time and temporary work is plentiful across a range of employers, from small, independent retailers to national and multinational retail chains. Solid store experience can lead to an array of retail management and store support career ladders.
- A college degree can afford direct entry into management training programs and regional/corporate level career paths.

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