

New Jersey's Retail, Hospitality & Tourism Industry Cluster

Prepared by:
New Jersey Department of Labor & Workforce Development
Office of Research & Information
Bureau of Labor Market Information
Winter 2015 - 2016



STATE OF NEW JERSEY
DEPARTMENT OF LABOR AND
WORKFORCE DEVELOPMENT



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THE GOAL OF THIS REPORT IS TO GET AN “IDEA” OF WHAT LHR MEANS TO NEW JERSEY

Identify the types of industries and establishments that make up the health care cluster based on a standard industry classification system

Describe any similarities and differences among its components with regard to such variables as employment, wage, occupation type, education, and demographic characteristics

Examine any present distinctions within the cluster and its components that give New Jersey a competitive advantage compared to neighboring states, regions or the nation, or show areas where New Jersey could improve to add to the state’s economy

Analyze the current state of the health care cluster and provide an outlook for employment into the future



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



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What is the Leisure, Hospitality and Retail (LHR) Industry Cluster?

Composition of NAICS Codes

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 Industries

72 Accommodations and Food Services

- 721 Accommodations
- 722 Food Services and Drinking Places





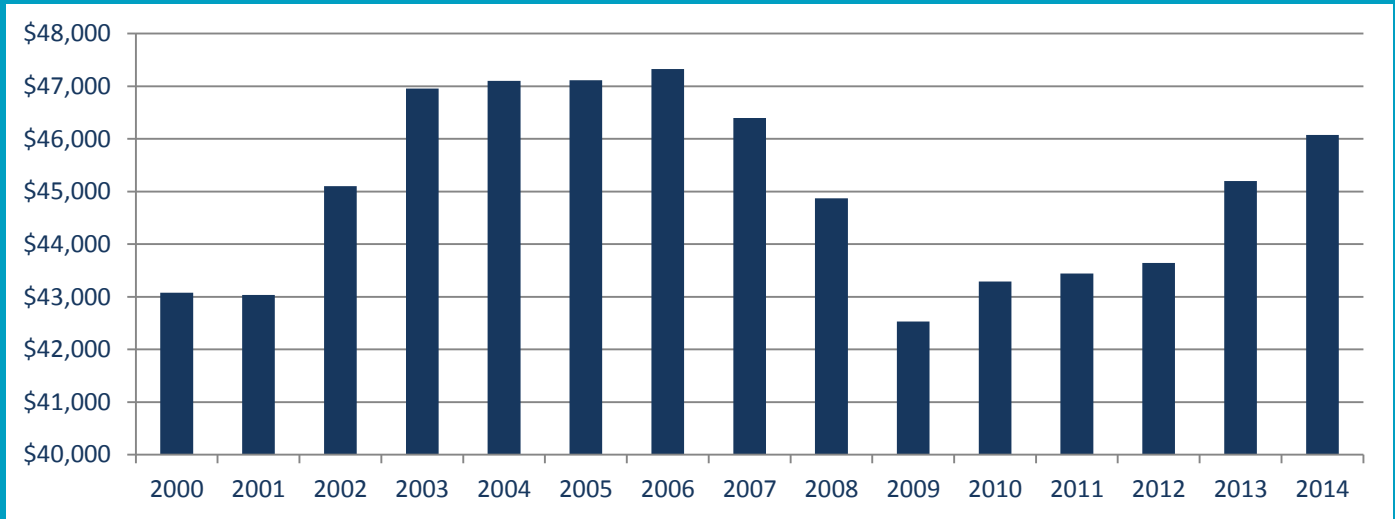
Highlights of the LHR Industry Cluster



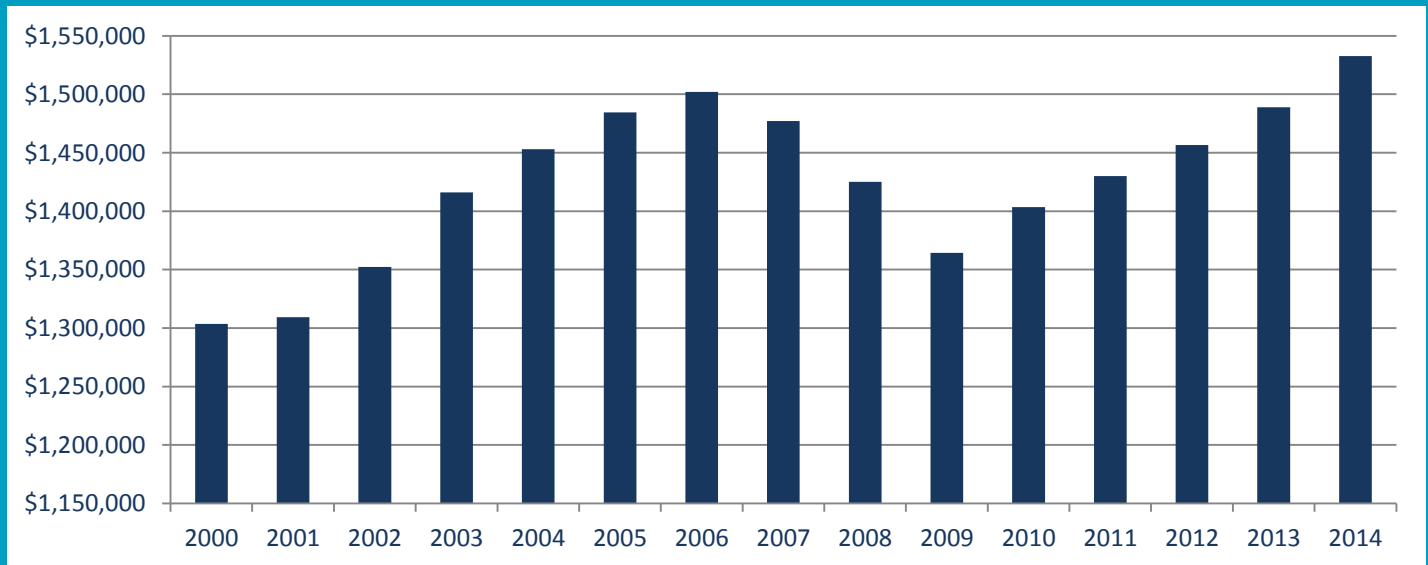
- The latest data show that:
 - Leisure, hospitality and retail trade (LHR) employment totaled 806,044 in 2014, or nearly one-quarter (24.7%) of all private sector workers in the state. In comparison, the cluster represented 25.9 percent of the nation's private sector employment in 2014.
 - LHR represented \$46.1 billion or 9.1 percent of the state's real Gross Domestic Product in 2014.
 - New Jersey LHR employers paid over \$22 billion in wages during 2014, or 11.6 percent of the state total. In addition, LHR businesses accounted for 21.1 percent of all units in the statewide total private sector in 2014.
 - Many of the businesses within LHR are involved in New Jersey's travel and tourism and directly support 315,952 jobs.

Leisure, Hospitality & Retail Real GDP: 2000 - 2014 (millions of chained 2009 dollars): NJ vs. US

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



NJ



US

Source:
Bureau of Economic Analysis
Prepared by: New Jersey
Department of Labor and
Workforce Development,
August 2015

LHR By Industry



➤ The 2014 average annual wage for New Jersey's LHR cluster was \$28,146 or less than half the state average for all private sector workers (\$60,146).

➤ In comparison, the annual average wage in the nation's LHR cluster was \$24,961 in 2014 or nearly 50 percent (48.6%) of the national average for all private sector workers (\$51,292).

New Jersey's Leisure, Hospitality & Retail Trade Cluster (2014)			
Industry Components	Employment	Establishments	Average Annual Wage (\$)
LHR Cluster	806,044	53,848	28,146
Retail Trade	451,549	30,936	31,713
Arts/Entertainment/Recreation	58,873	3,625	33,465
Accommodations	53,033	1,362	35,708
Food Services & Drinking Places	242,589	17,925	18,563
Private Sector Employment, NJ Total	3,264,264	254,711	60,146
Source: NJ Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, 2014 Annual Average			

➤ Total wages paid in New Jersey's LHR industry cluster during 2014 accounted for just 11.6 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



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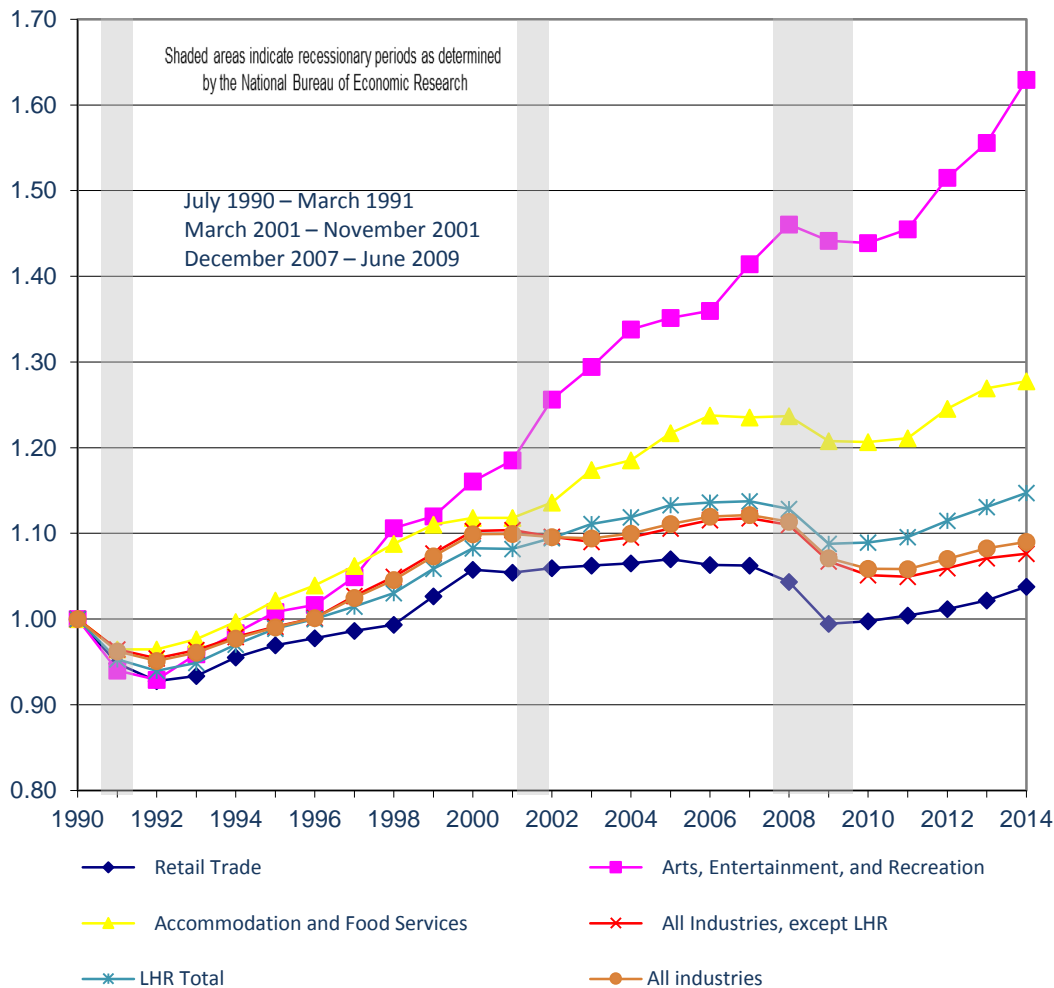
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Current Employment Statistics (CES): Description

- 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.

**Leisure, Hospitality & Retail Employment Index:
Annual Averages 1990 to 2014
Current Employment Statistics (CES)**



➤ 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.

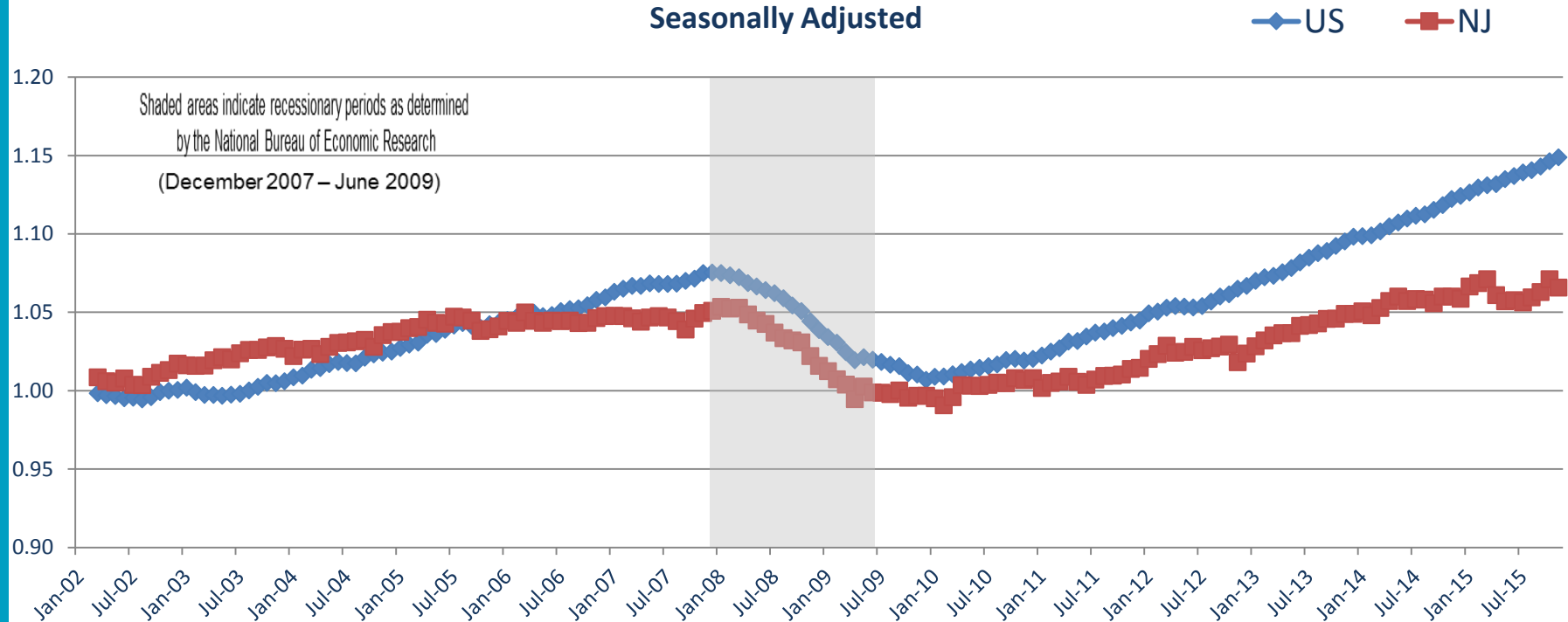
➤ The recession and consumer spending has led Retail employment to be the laggard among LHR's major components.

(For illustrative purposes: NAICS 721 & 722 combined)

Source: NJLWD, Current Employment Statistics
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.

NJ and US Leisure, Hospitality & Retail Industry Cluster Employment Index
January 2002 – November 2015 (Preliminary)
Seasonally Adjusted



➤ 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.

Source: NJLWD, Current Employment Statistics

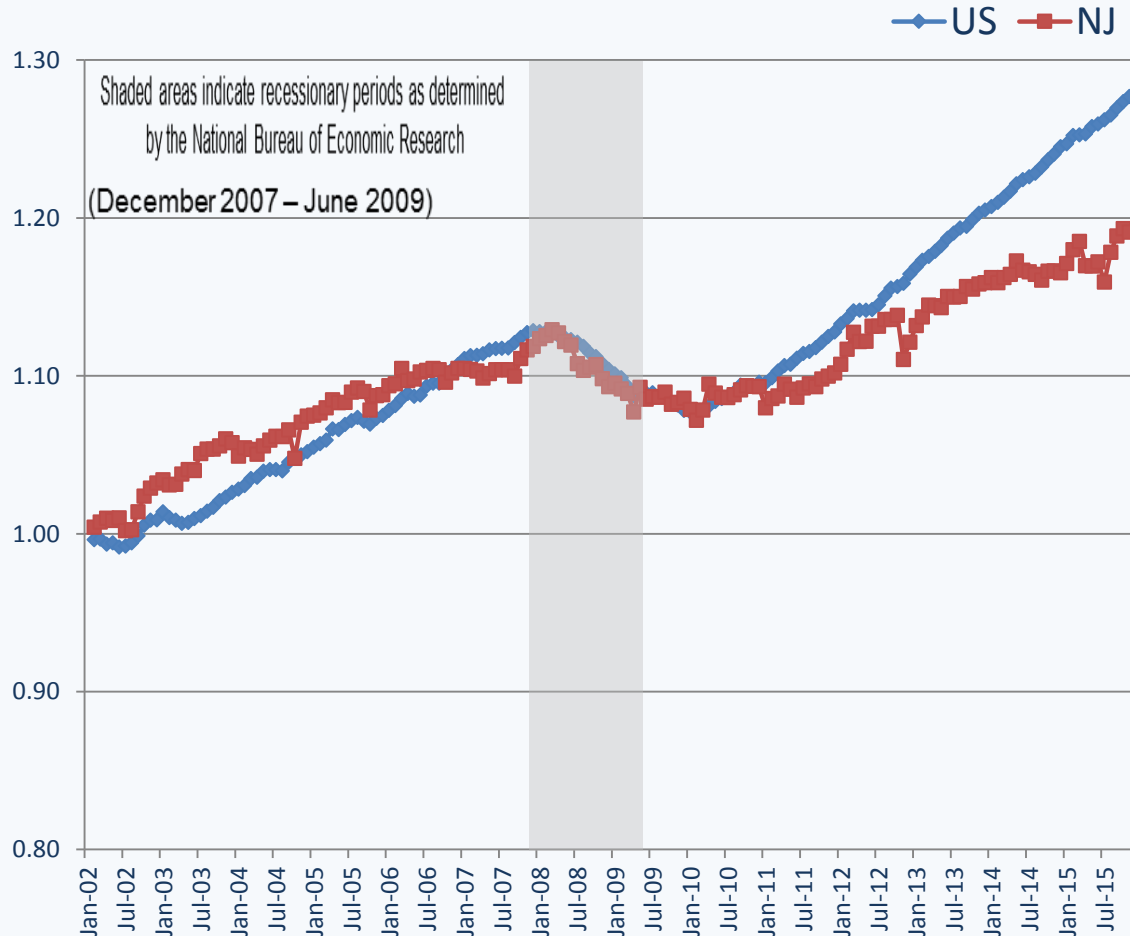
Prepared by: New Jersey Department of Labor and Workforce Development, December 2015

NJ and US Employment Index Leisure & Hospitality

January 2002 – November 2015 (Preliminary)

Seasonally Adjusted Current Employment Statistics (CES)

NJ and US *Leisure and Hospitality* Employment Index



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.

Source: NJLWD, Current Employment Statistics

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

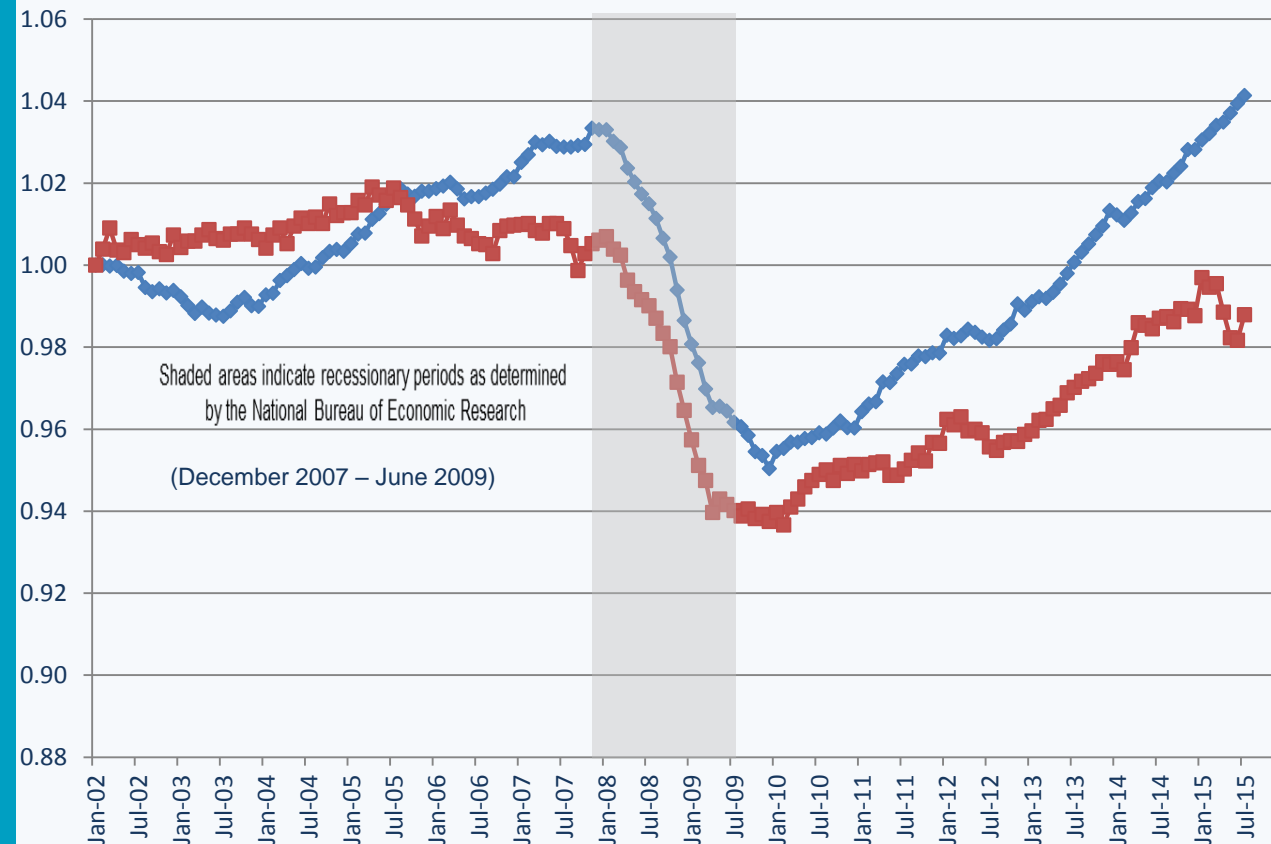
NJ and US Employment Index Retail Trade

January 2002 – November 2015

Seasonally Adjusted Current Employment Statistics (CES)

NJ and US *Retail* Employment Index

—◆— US —■— NJ



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, December 2015

Quarterly Census of Employment and Wages (QCEW): Description

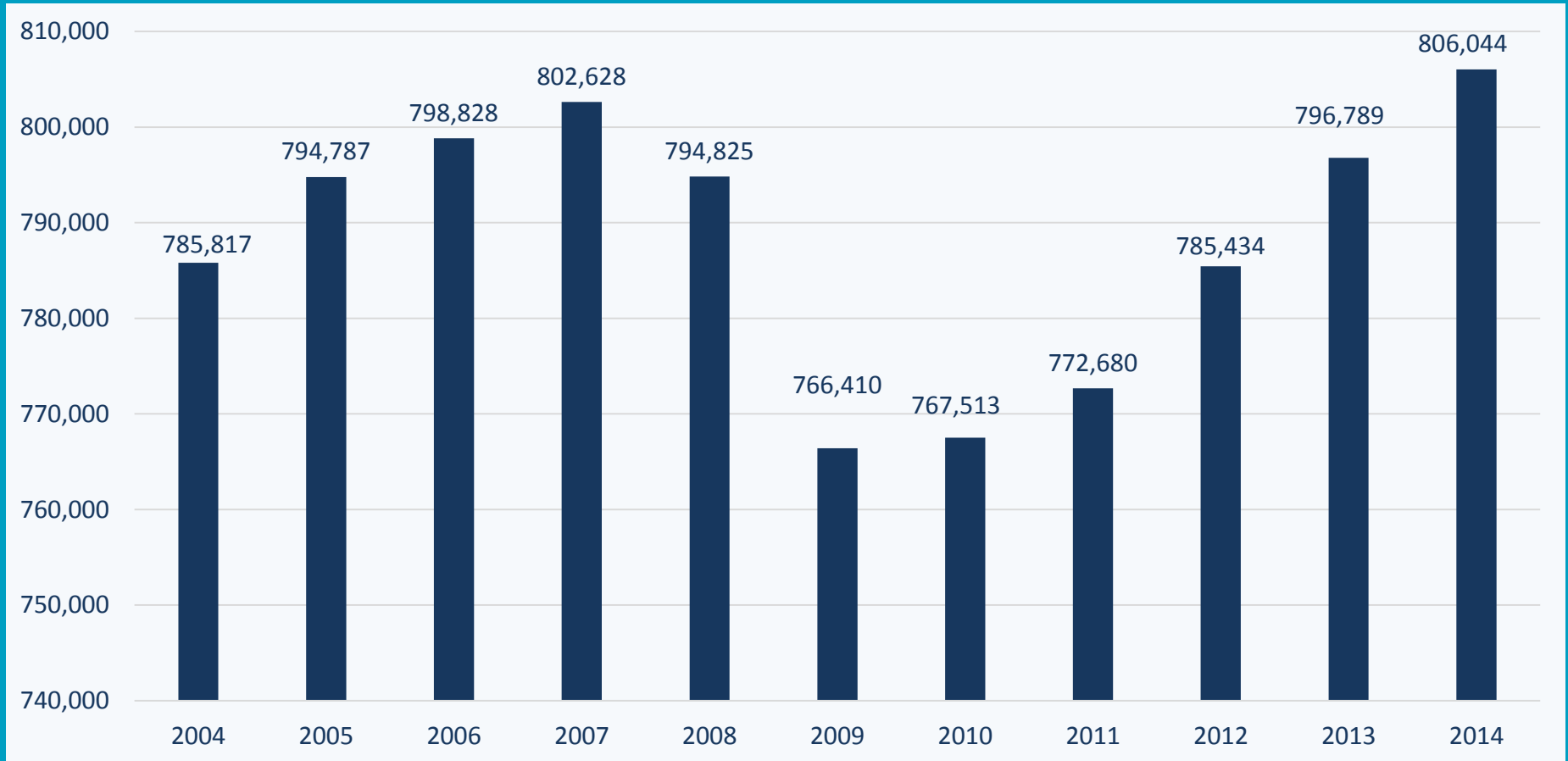
- Tabulations of employment and wage data for employers covered under the New Jersey Unemployment Compensation Law. QCEW is a program of the Bureau of Labor Statistics, U.S. Department of Labor.
- Beginning with the release of 2001 annual and 2002 quarterly data, the program has switched to the North 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 - 2014



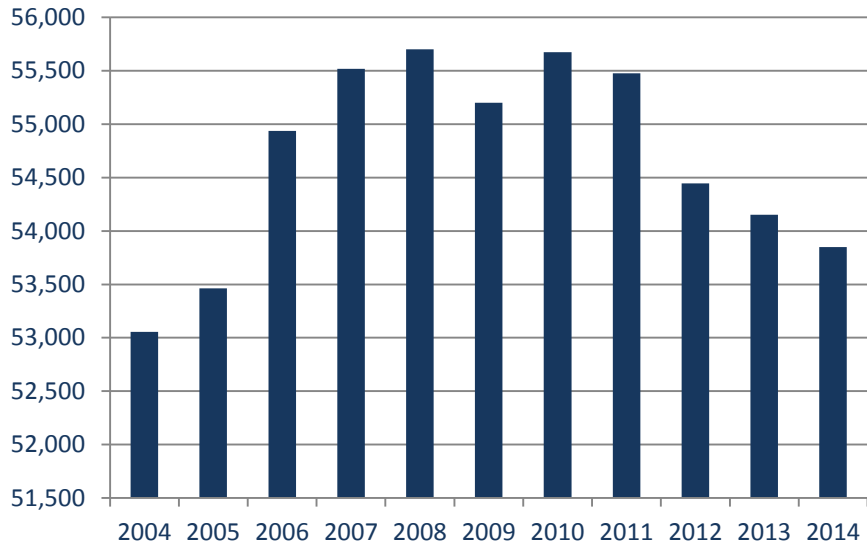
As illustrated above, New Jersey's LHR employment has shown steady improvement after being down in two consecutive years: '07-'08 and '08-'09... as a result of the recession.

Leisure, Hospitality & Retail

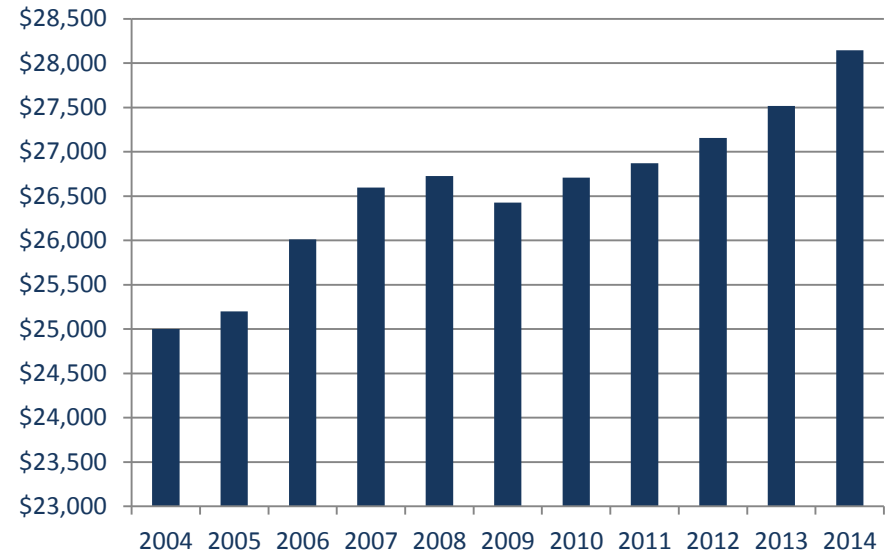
Quarterly Census of Employment & Wages

Establishments & Wages: Annual Averages, 2004 - 2014

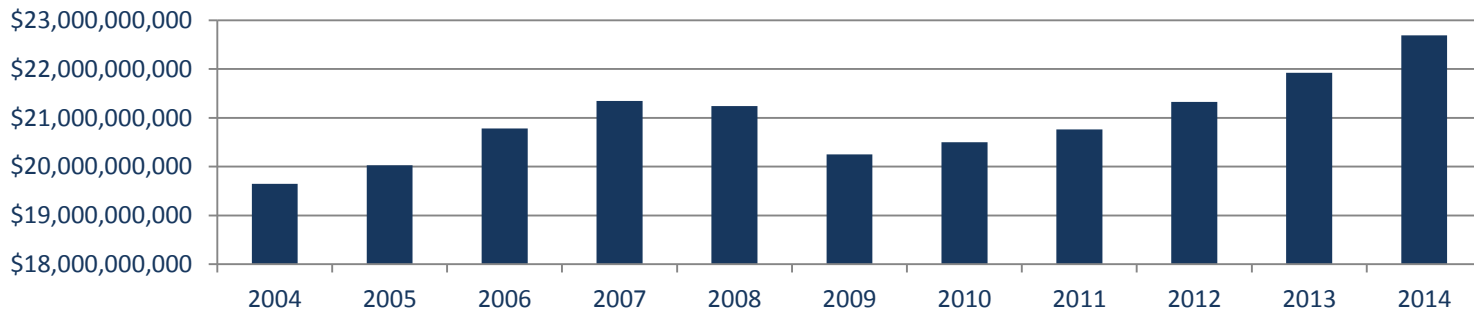
Establishments/Units



Annual Wages

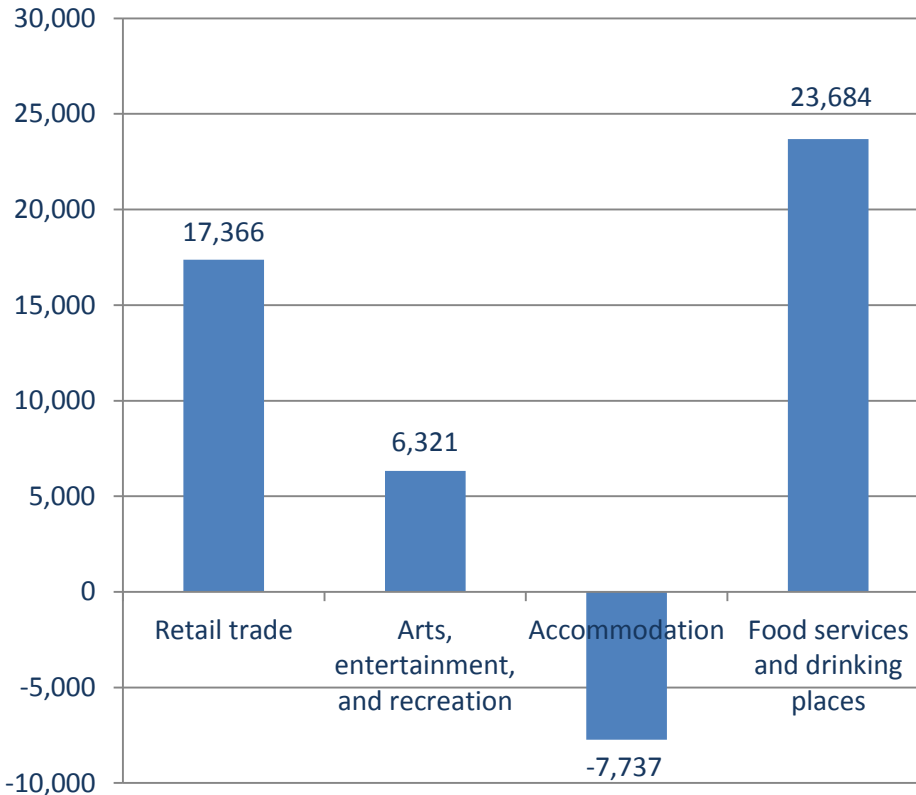


Total Wages



More Recent Analysis: 2009 - 2014

NJ LHR Employment Change: 2009 to 2014



- Retail trade job levels added over 17,000 while employment in Accommodations fell nearly 7,800. For retail in particular, NJ is an inviting marketplace given its population density (highest in the nation) and per capita income (second highest).
- In Accommodations, 9,421 of the losses occurred within Atlantic City's casino hotels due to neighboring competition resulting in a rash of casino closings.
- The other two of the cluster's four primary components (Food Services/Drinking Places and Arts/Entertainment/Recreation) also added jobs during this five-year period. Full-service restaurants accounted for about 66.2 percent in the Food Services/Drinking Places industry, while Fitness & Recreational Sports Centers created most of the new jobs (58.7%) in the A/E/R industry.



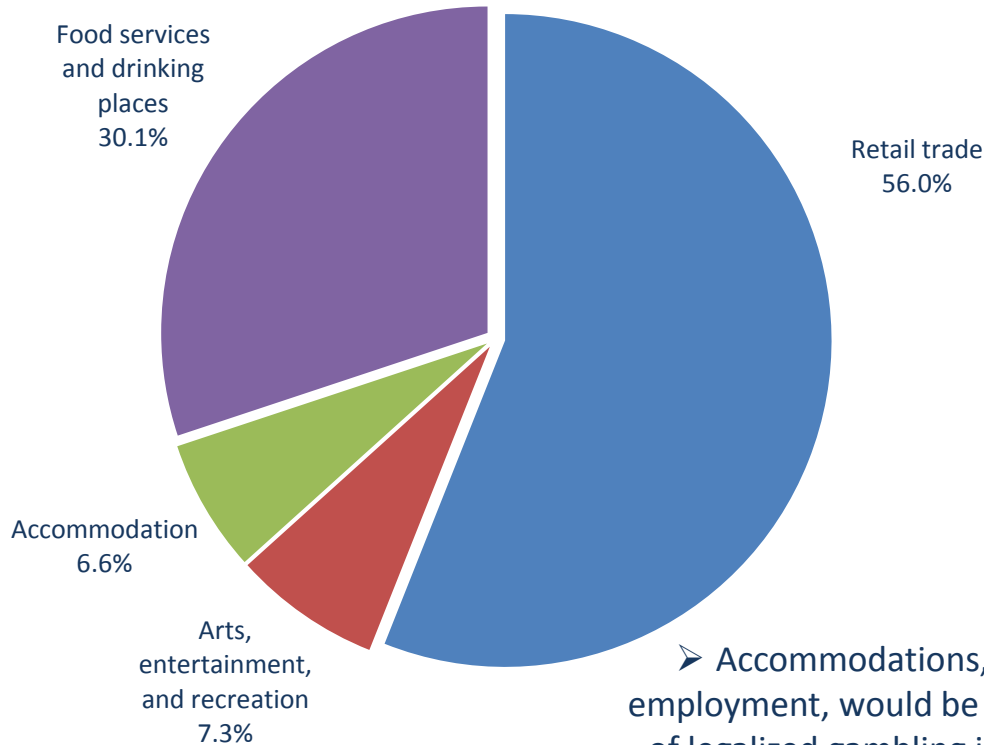
Breaking the four primary components into their 17, three-digit NAICS industries and comparing the state's percent change in employment to the nation's from 2009-to-2014 yields the table below:

NAICS	Industry	2009 - 2014	
		Percent Change	
		NJ	US
447	Gasoline stations	16.9	6.8
452	General merchandise stores	13.5	4.2
713	Amusements, gambling, and recreation	12.5	7.5
711	Performing arts and spectator sports	13.3	12.0
441	Motor vehicle and parts dealers	14.7	13.8
445	Food and beverage stores	4.4	5.9
444	Building material and garden supply stores	2.9	5.5
722	Food services and drinking places	10.8	14.1
442	Furniture and home furnishings stores	-2.6	1.6
443	Electronics and appliance stores	-4.7	-0.3
451	Sporting goods, hobby, book and music stores	-6.0	-0.1
448	Clothing and clothing accessories stores	-5.3	0.7
446	Health and personal care stores	-2.6	3.5
454	Nonstore retailers	11.3	18.7
453	Miscellaneous store retailers	-3.4	4.1
721	Accommodation	-12.7	7.9
712	Museums, historical sites, zoos, and parks	-5.4	15.6

- Six NJ LHR industries posted losses while the nation's rose from 2009 to 2014: NAICS 442; 448; 446; 453; 721 and 712.
- The state LHR industry that posted the largest difference in employment gain, percentage-wise, than the nation was Gasoline Stations (+16.9% vs. +6.8%) due to Wawa's ongoing expansion. NJ is one of two states (Oregon is the other) without self-service thus creating extra jobs.
- The most significant loss (-7,737 jobs) in NJ occurred in accommodations due to the rash of Atlantic City casino closings. Nationally, this industry *added* 138,179 jobs.
- The fastest-growing industry within LHR in the US was non-store retailers. The significant gain could be partly attributed to an increase in online shopping

2014 Percentage of employment: Four primary components

**NJ LHR Employment by Major Industry Components
2014 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 (86.1%) in the LHR cluster in 2014.

➤ 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 2014, has nearly one of every four jobs (24.8%) in Food Stores.

➤ Food Services/Drinking Places, which accounted for 30.1 percent of the cluster's employment in 2014, is dominated by restaurants and other eating places, which represent over three quarters (84.2%) of its employment.

➤ Accommodations, which represents just 6.6 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 25,709 in 2014; less than the other Accommodations establishments in the NJ combined.



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



NJ LHR 2014 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 44 percent of all the jobs.
- Food Services/Drinking Places accounted for 30.1 percent of the cluster’s total employment in 2014 with another 13.9 percent in Food Stores.

Source: NJLWD, Quarterly Census of Employment and Wages
 Prepared by: New Jersey Department of Labor and Workforce Development, September 2015

Digestion of Food data



- Within the *Food Services/Drinking Places* industry, the new group (NAICS 7225, which now combines full- and limited-service) restaurants and other eating places dominates with 84.5 percent of the establishments, 84.2 percent of the employment and 81.1 percent of the total wages paid in 2014.
- Despite a *decrease* in the number of drinking places (NAICS 7224, -174 units) from 2009 to 2014, payrolls *increased* by 627 (or 7.0%) accounting for 6.5 percent of establishments, 3.9 percent of employment and 3.7 percent of total wages in 2014.
- The 2014 annual average wage of those employed in *Food Services/Drinking Places* was \$18,563, which was just 30.9 percent of the state's private sector average wage (\$60,146) and 66.0 percent of the LHR cluster's average wage (\$28,146).



Aperitivo - Appetizers		Cenas - Dinners		Mariacos - Seafood	
NACHOS	\$6.50	PEREZ COMBINACION #1, skirt steak, chile relleno	\$12.95	CAMARONES EMPANISADOS	\$10.50
QUESO FUNDIDO	\$4.50	Ch-chese nachos with rice and beans	\$11.95	breaded shrimp served with salad	\$11.95
CHILE CON QUESO	\$4.50	COMBINACION #2, steak burrito, chicken natcha	\$11.95	CAMARONES A LA DIABLA	\$11.95
QUESADILLA CINCRONIZADA	\$2.95	Ch-natcha	\$10.95	shrimp, hot and spicy served with rice & salad	\$11.95
GUACAMOLE	\$3.95	COMBINACION #3 VEGETARIANA, veggie natcha,	\$10.95	CAMARONES A LA VERACRUZANA	\$11.95
		chese quesadilla & guacamole taco	\$11.95	served with rice and salad	\$11.95
		CARNE ASADA, skirt steak with rice,	\$11.95	CAMARONES A LA PLANCHA	\$11.95
		beans and salad	\$9.95	served with rice and salad	\$11.95
		BISTEC A LA MEXICANA, steak mixed	\$9.95	CAMARONES AL MOJO DE AJO	\$11.95
		with peppers, tomatoes & homemade red sauce	\$9.95	served with rice and salad	\$11.95
		BISTEC RANCHERO, steak served with	\$9.95	ENSALADA DE CAMARON	\$10.95
		hot salsa, rice and beans	\$9.95	shrimp salad	\$11.95
		LOMO DE RES, rib-eye steak served with	\$10.95	FILETE DE CAMARON	\$11.95
		homemade mild sauce	\$9.50	shrimp fajitas served with onion, bell pepper,	\$11.95
		POLLO EN MOLE, chicken in mole sauce	\$9.50	tomato, rice & beans	\$11.95
		served with rice and beans	\$9.95	CALEDO DE CAMARON,	\$10.95
		FAJITAS DE CARNE ASADA, steak fajitas with	\$9.95	shrimp soup	\$10.95
		bell peppers, onion, tomato, mild or hot	\$9.95	HUACHINANGO	Market Price
		FAJITAS DE POLLO, chicken fajitas with	\$9.95	red sausage served with rice and salad	\$8.95
		bell peppers, onion, tomato, mild or hot	\$8.95	FILETE DE PESCADO	\$7.95
		QUESADILLAS DINNER, corn or flour tortillas	\$8.95	breaded fish fillet served with rice and salad	\$8.95
		with chese, with meat \$1.00 extra	\$7.95	SHRIMP COCKTAIL	\$7.95
		FILAUTAS DINNER, with rice and beans	\$8.95	chicken, onion, avocado & tomato	\$2.50
		MILANESA DINNER, skirt steak breaded	\$8.50	ceviche tostadas	\$2.50
		with rice and beans	\$8.50	lettuce, tomato, onion & avocado	\$6.95
		ENCHILADAS VERDES, ROJA Y DE MOLE,	\$8.50		
		with chese	\$8.50		
		3 TACO DINNER, served with rice & beans	\$8.50		
		CHIMICHANGA DINNER	\$8.50		
		with choice of meat	\$8.50		
		CHILE RELLENO, sweet stuffed peppers	\$2.95		
		with chese	\$2.45		
		TACO SALAD, choice of meat, served with lettuce,	\$2.45		
		beans, tomato, avocado, sour cream, ch-			

Inside Food Stores...



- In the Food Stores industry, supermarkets and other grocery stores (except convenience stores) accounted for nearly three of every four (73.3%) jobs, 75.1 percent of the total wages paid and more than one third (36.5%) of the establishments.



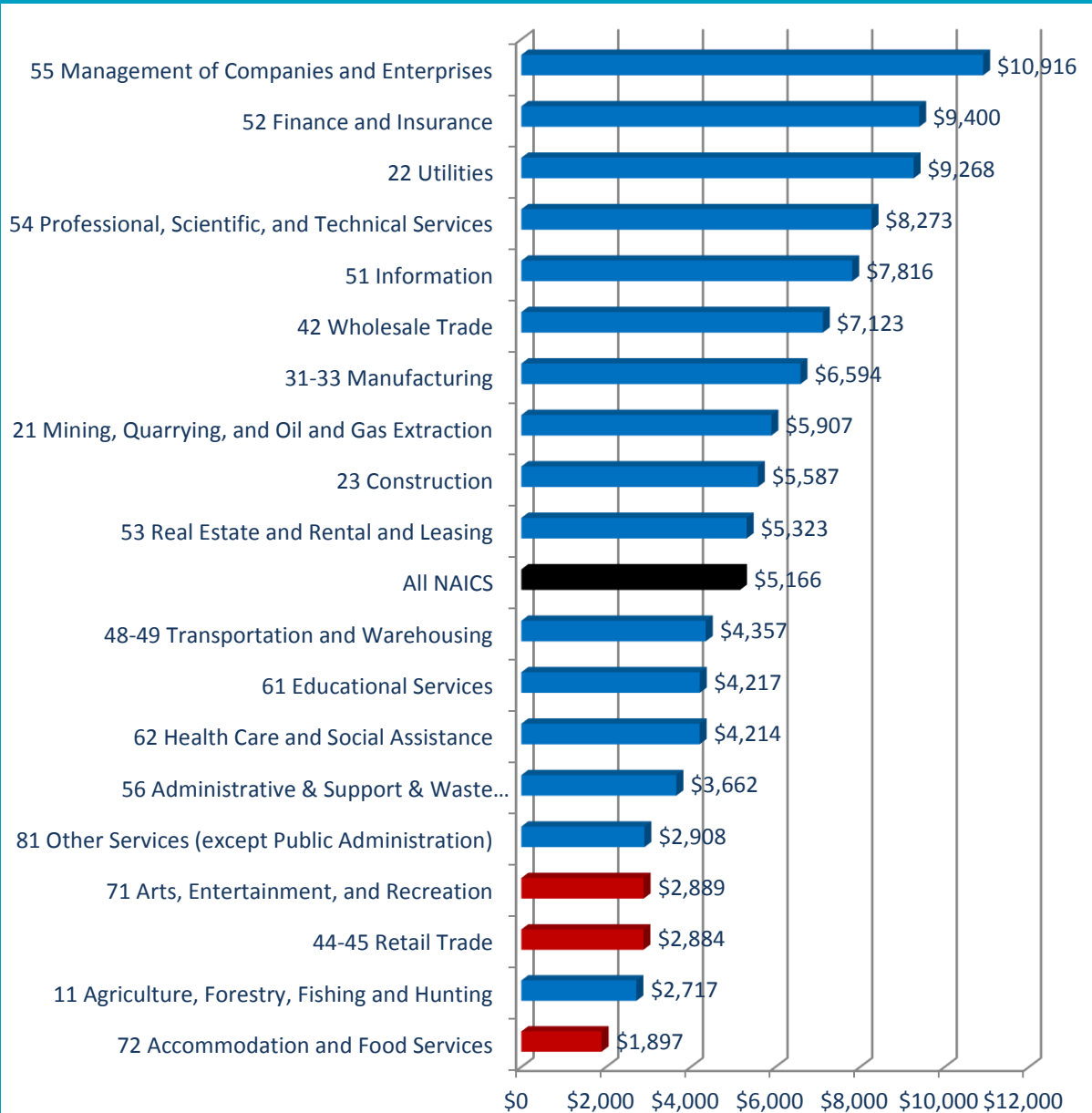
- In terms of employment, Convenience Stores and Beer, Wine and Liquor Stores round out the top three accounting for about 9.6 and 8.7 percent of the Food Stores total, respectively.
- The 2014 average annual wage of those employed in the Food Stores industry was \$24,871, which was 88.4 percent of the LHR cluster's average wage (\$28,146) but just 41.4 percent of the state's private sector average wage (\$60,146). Supermarkets and Other Grocery Stores, the largest segment of Food Stores, posted a 2014 annual average wage of \$25,493.

Local Employment Dynamics (LED)

- 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: 2013Q4 to 2014Q3, averaged)



➤ Due to the lower-paying nature of the jobs within the industry cluster, the bottom-ranked (16th, 17th and last) of all 19 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
November 2015

Lowest Average Monthly Earnings (3-digit NAICS):

All NAICS subsectors	\$5,205
525 Funds, Trusts, and Other Financial Vehicles	1,457
722 Food Services and Drinking Places	1,646
452 General Merchandise Stores	1,888
713 Amusement, Gambling, and Recreation Industries	1,908
812 Personal and Laundry Services	2,029
447 Gasoline Stations	2,191
712 Museums, Historical Sites, and Similar Institutions	2,240
445 Food and Beverage Stores	2,256
485 Transit and Ground Passenger Transportation	2,298
624 Social Assistance	2,310
448 Clothing and Clothing Accessories Stores	2,354
451 Sporting Goods, Hobby, Musical Instrument, and Book Stores	2,379
115 Support Activities for Agriculture and Forestry	2,397
453 Miscellaneous Store Retailers	2,398
922 Justice, Public Order, and Safety Activities	2,412
814 Private Households	2,490
112 Animal Production and Aquaculture	2,767
111 Crop Production	2,795
623 Nursing and Residential Care Facilities	2,833
113 Forestry and Logging	2,910
721 Accommodation	3,010
487 Scenic and Sightseeing Transportation	3,195

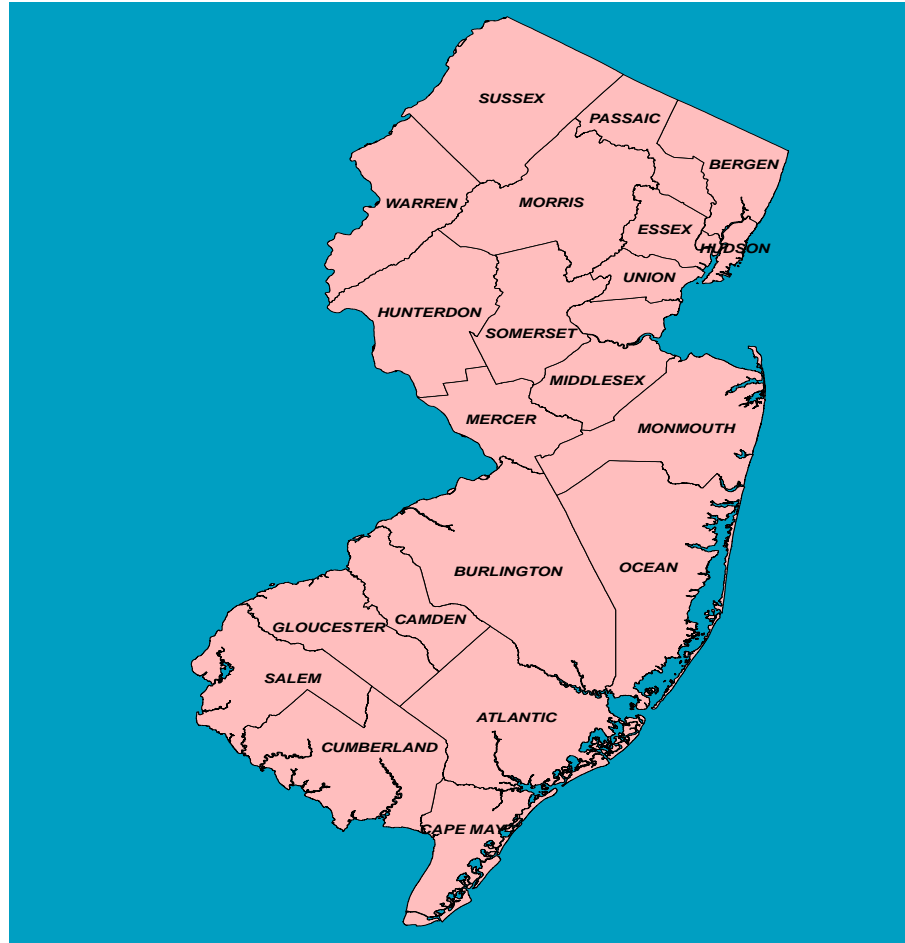
➤ Based on three-digit Local Employment Dynamics (LED) data from the US Census Bureau, **ten of the 22 lowest (red) of all industries** by average monthly wages fall within the Leisure, Hospitality and Retail industry cluster. Two other industries (**purple**) are considered “tourism-related”.

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

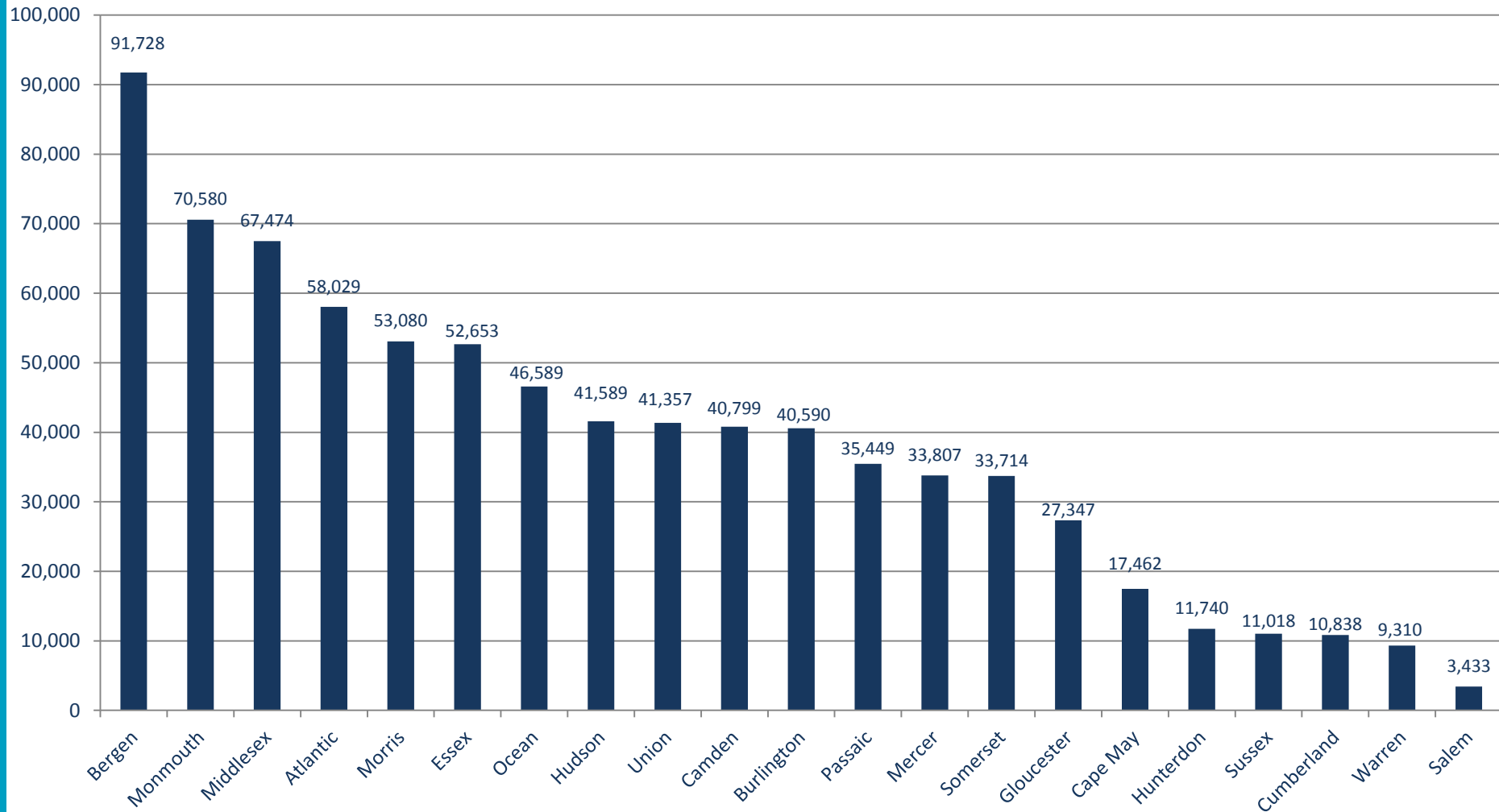
Per LED extraction tool: 2014Q1 to 2014Q4 (\$) averaged, Average monthly earnings of employees with stable jobs (i.e., worked with the same firm throughout the quarter).
NJ Private Firms Only

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

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



2014 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, September 2015

2014 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
Cape May	1,657	17,462	\$23,112	\$403,583,199	44.4%	54.6%
Atlantic	2,039	58,029	28,337	1,644,388,926	32.5%	54.2%
Ocean	2,959	46,589	23,494	1,094,582,632	24.4%	35.5%
Sussex	734	11,018	23,199	255,610,707	22.1%	35.3%
Gloucester	1,463	27,348	25,062	685,399,055	24.8%	33.8%
Monmouth	4,653	70,579	24,455	1,726,041,298	24.2%	33.1%
Warren	650	9,310	22,829	212,540,303	24.6%	32.9%
Hunterdon	872	11,740	27,008	317,076,365	21.8%	29.8%
Passaic	2,936	35,449	25,919	918,811,819	24.7%	25.9%
Camden	2,694	40,799	26,346	1,074,872,784	23.8%	24.7%
STATEWIDE	53,848	806,044	28,146	22,687,106,813	21.1%	24.7%
Burlington	2,436	40,590	25,433	1,032,317,782	23.2%	23.9%
Cumberland	792	10,837	22,014	238,566,356	27.0%	23.8%
Bergen	6,096	91,727	32,095	2,943,986,141	19.2%	23.5%
Union	3,175	41,357	26,720	1,105,053,819	23.0%	21.9%
Morris	3,265	53,080	37,384	1,984,341,789	19.9%	21.2%
Hudson	3,419	41,589	30,052	1,249,833,741	24.9%	21.0%
Somerset	1,912	33,714	31,155	1,050,363,333	19.8%	20.8%
Salem	278	3,434	19,530	67,064,364	24.6%	20.5%
Essex	4,392	52,653	28,479	1,499,529,945	22.5%	20.4%
Mercer	2,162	33,807	25,512	862,488,783	20.6%	20.2%
Middlesex	4,240	67,474	27,420	1,850,112,977	20.0%	19.9%

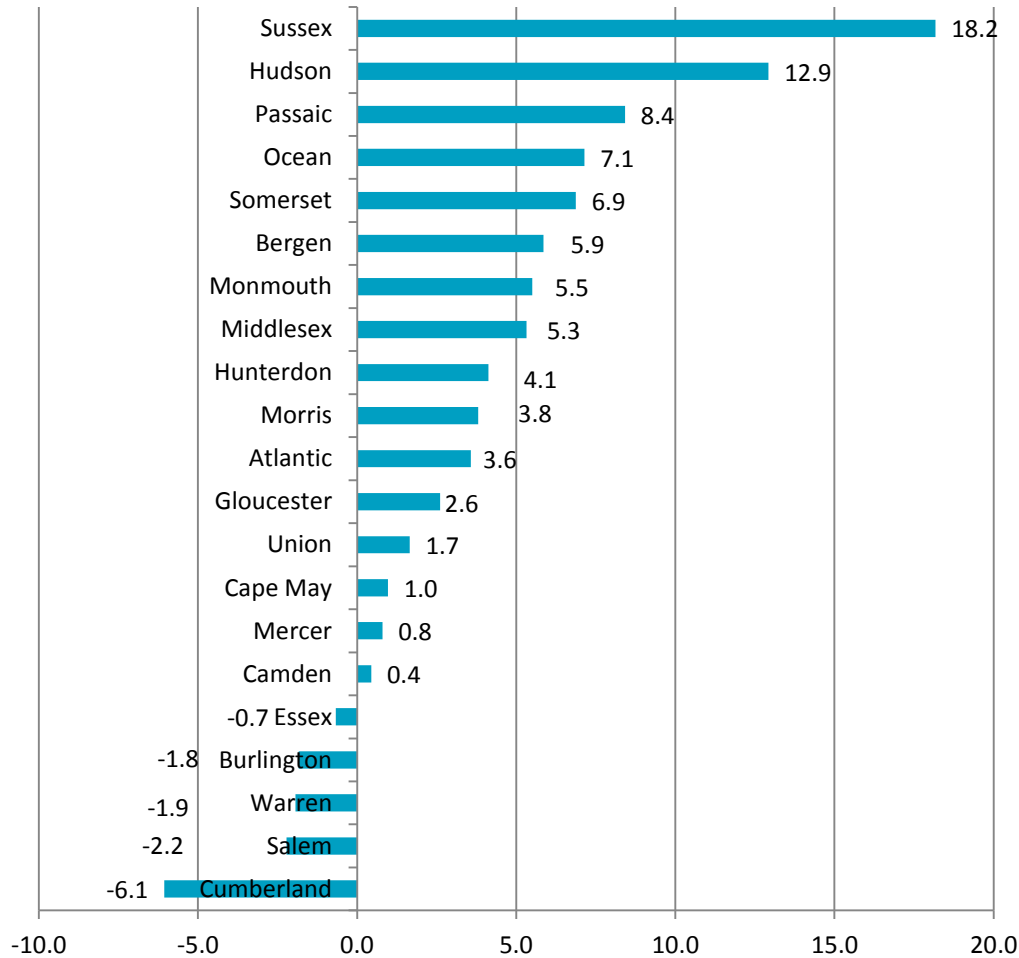
Due primarily to their tourism-based economies, over one-half of Cape May (54.6%) and Atlantic (54.2%) counties' 2014 total private employment is concentrated in the LHR cluster while the state's is almost one-quarter (24.7%).

Four counties had annual average wages over \$30,000 while the state averaged \$28,146 in LHR:

Morris - \$37,384
 Bergen - \$32,095
 Somerset - \$31,155
 Hudson - \$30,052

Retail Employment

Gains/Losses: 2009 - 2014 by County (Percent)



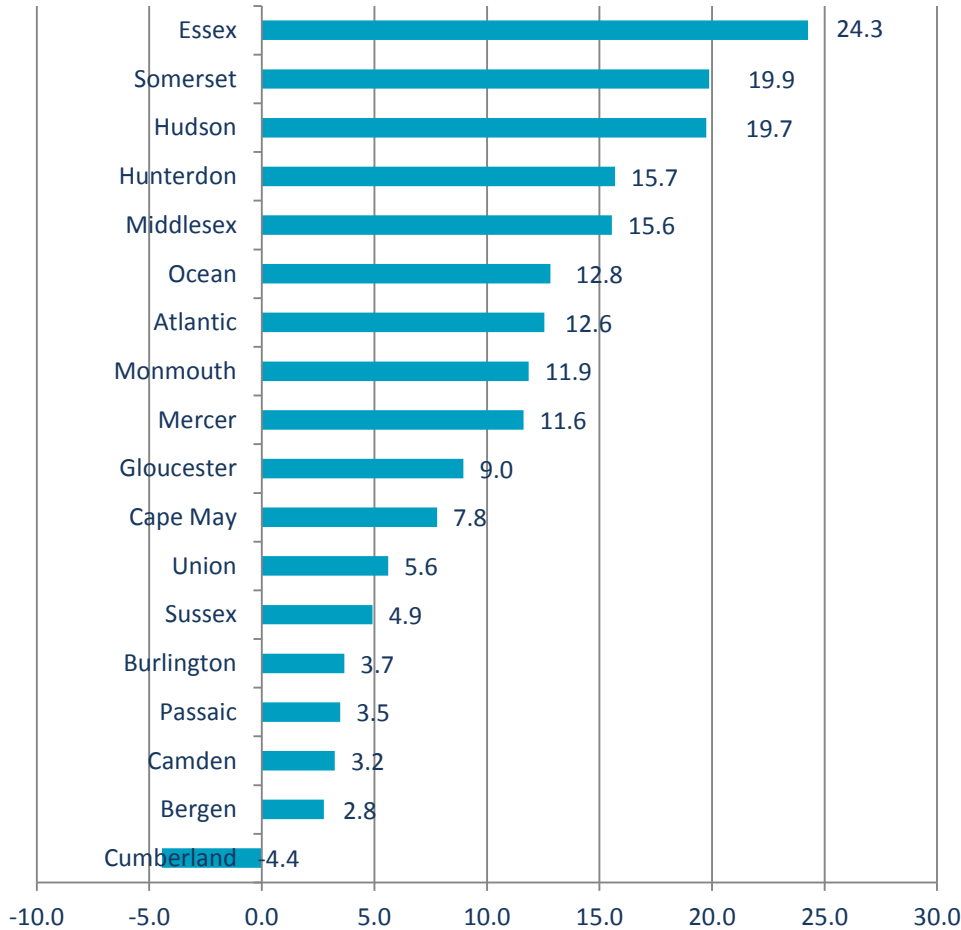
The graph ranks the state's counties by their percent rise/drop in retail trade employment.

The primary component, Retail Trade, recorded the LHR cluster's greatest employment increase from 2009-to-2014 (17,366) if NAICS 721 and 722 are combined to form NAICS 72 - Leisure and Hospitality.

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



Food Service and Drinking Places Employment Gains/Losses: 2009 - 2014 by County (Percent)



Food Services/Drinking Places was the LHR component with the greatest employment gain from 2009-to-2014 (23,452).

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.



LHR Employment & Population: 2014

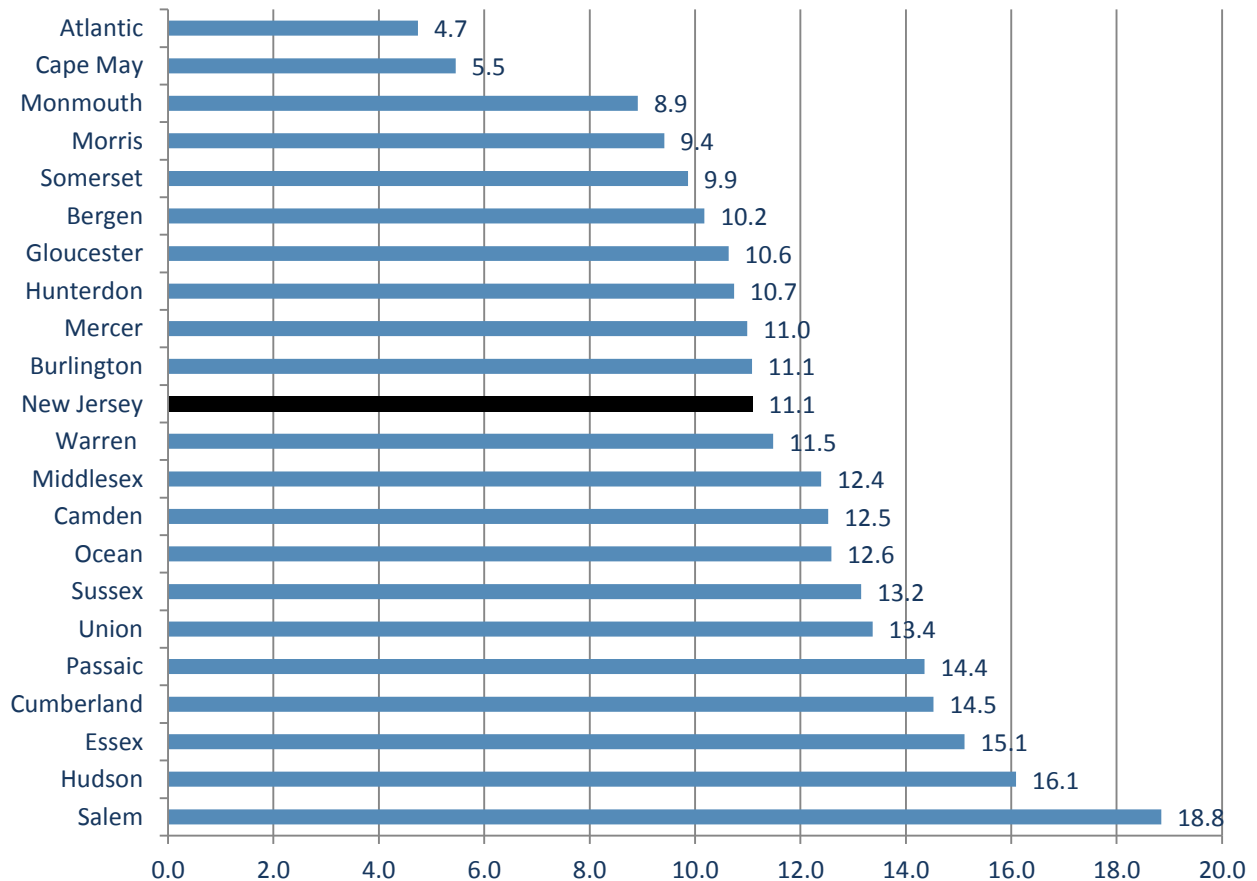
Number of Residents Per LHR Job

➤ 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 4.7 county residents in 2014.

➤ 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 2014



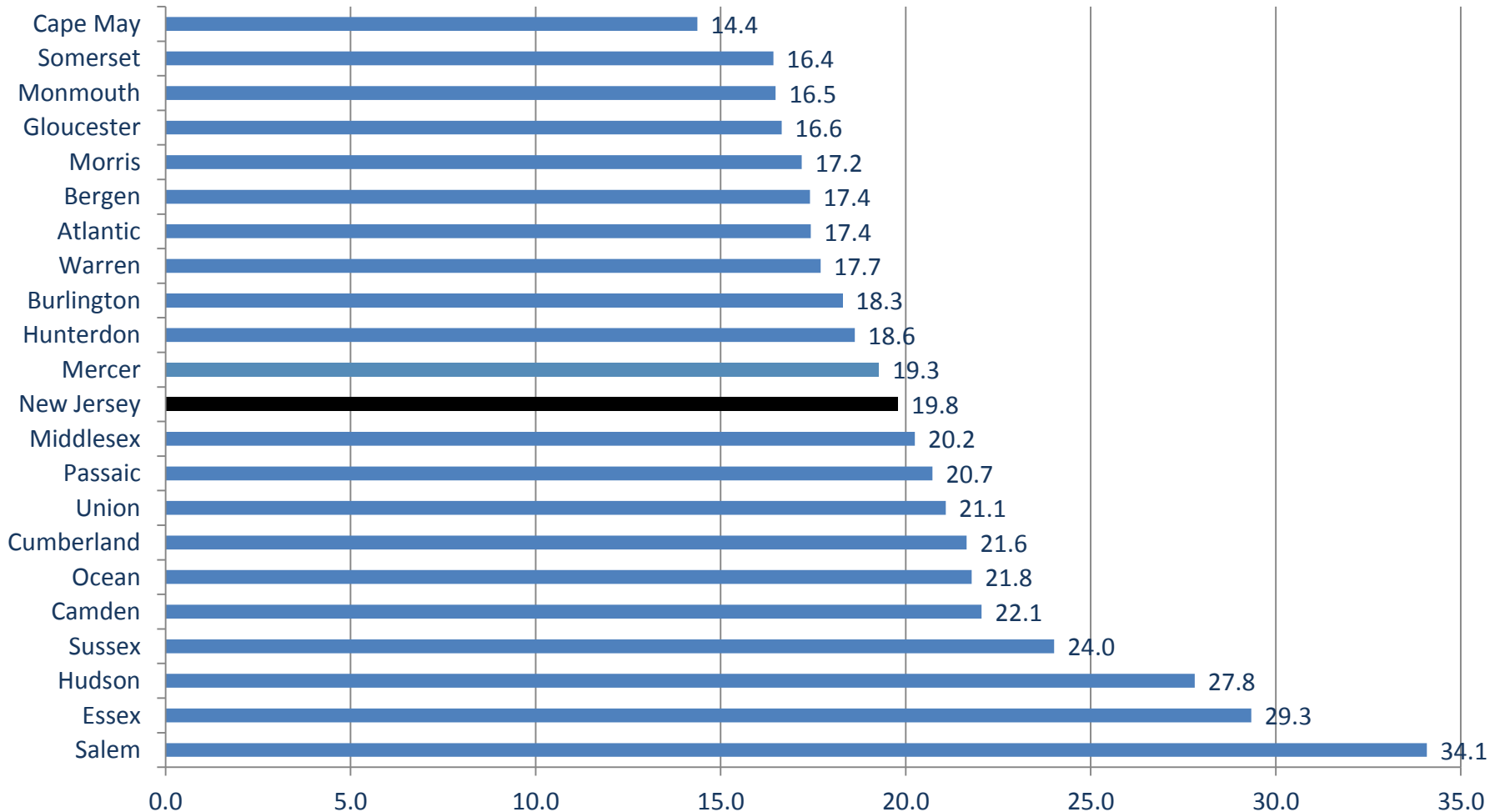
Source: NJLWD, US Census Bureau, 2014 Population Estimates, Quarterly Census of Employment & Wages, Annual Averages

Prepared by: New Jersey Department of Labor & Workforce Development, September 2015

NAICS 44-45 Employment & Population: 2014

Number of County Residents Per RETAIL Job

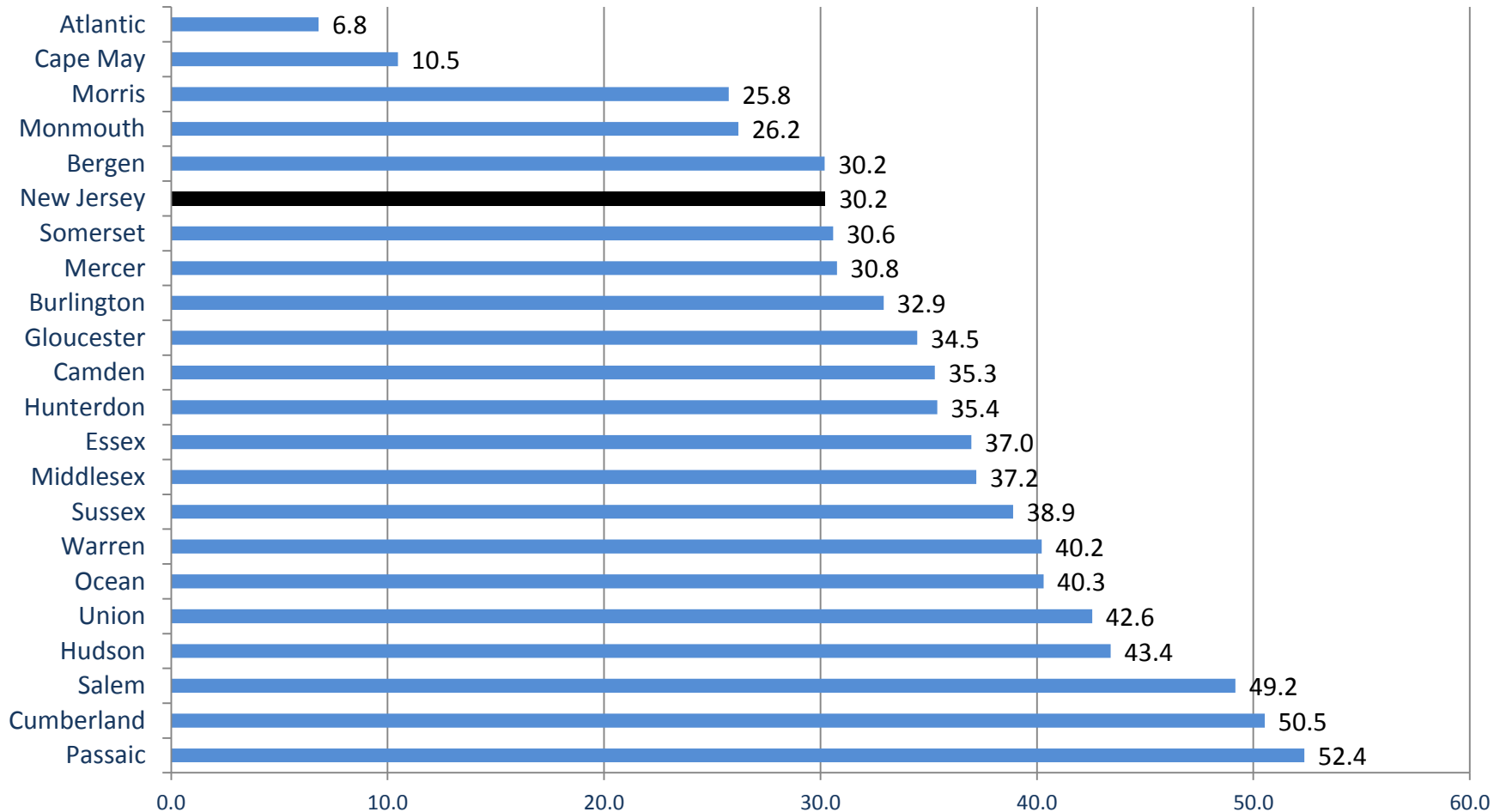
NJ Counties: Number of Residents Per *Retail* Job in 2014



NAICS 72 Employment & Population: 2014

Number of Residents Per Accommodation & Food Services Job

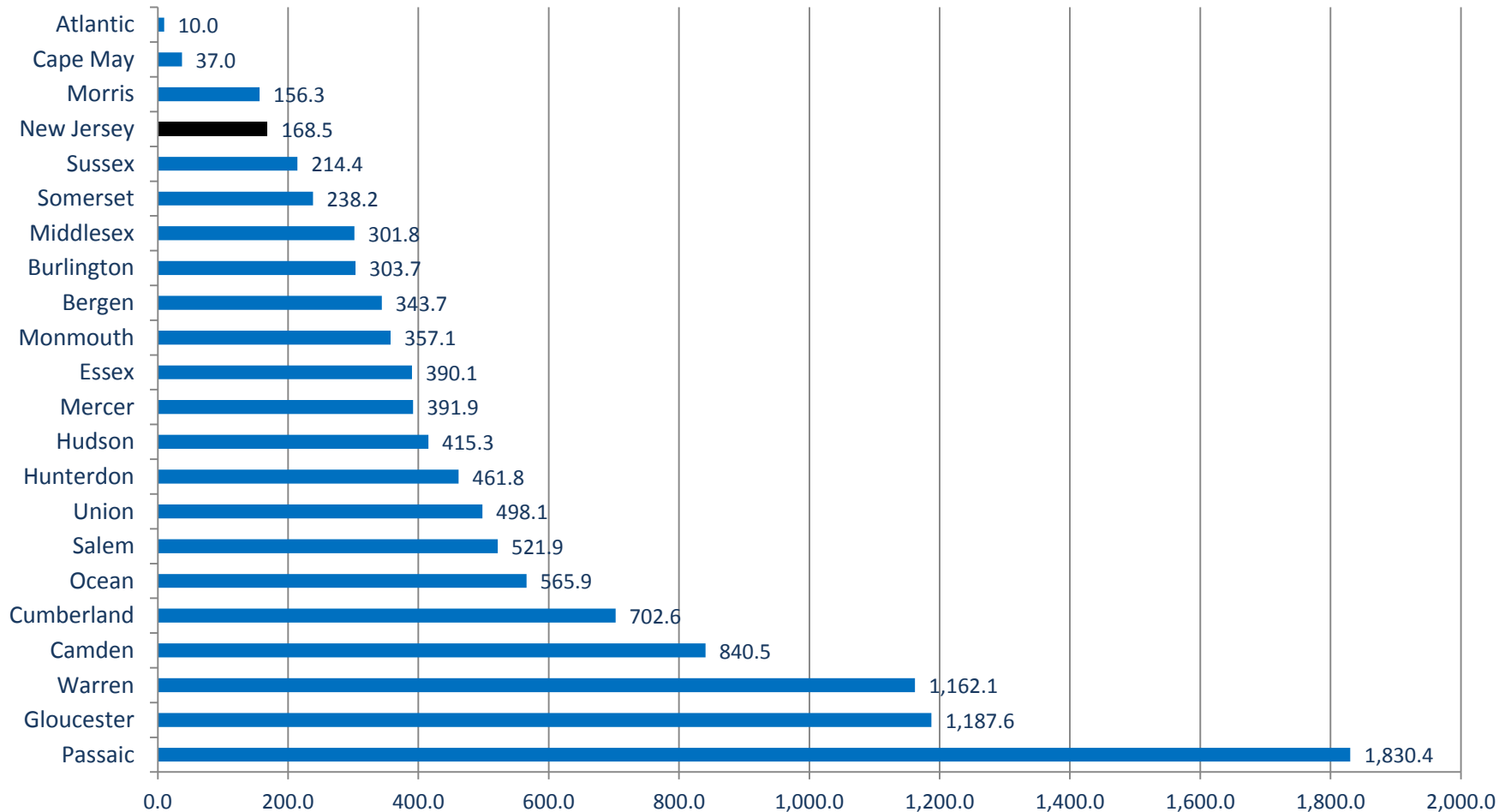
NJ Counties: Number of Residents Per *Accommodations and Food Service & Drinking Places* Job in 2014



NAICS 721 Employment & Population: 2014

Number of County Residents Per Accommodations Job

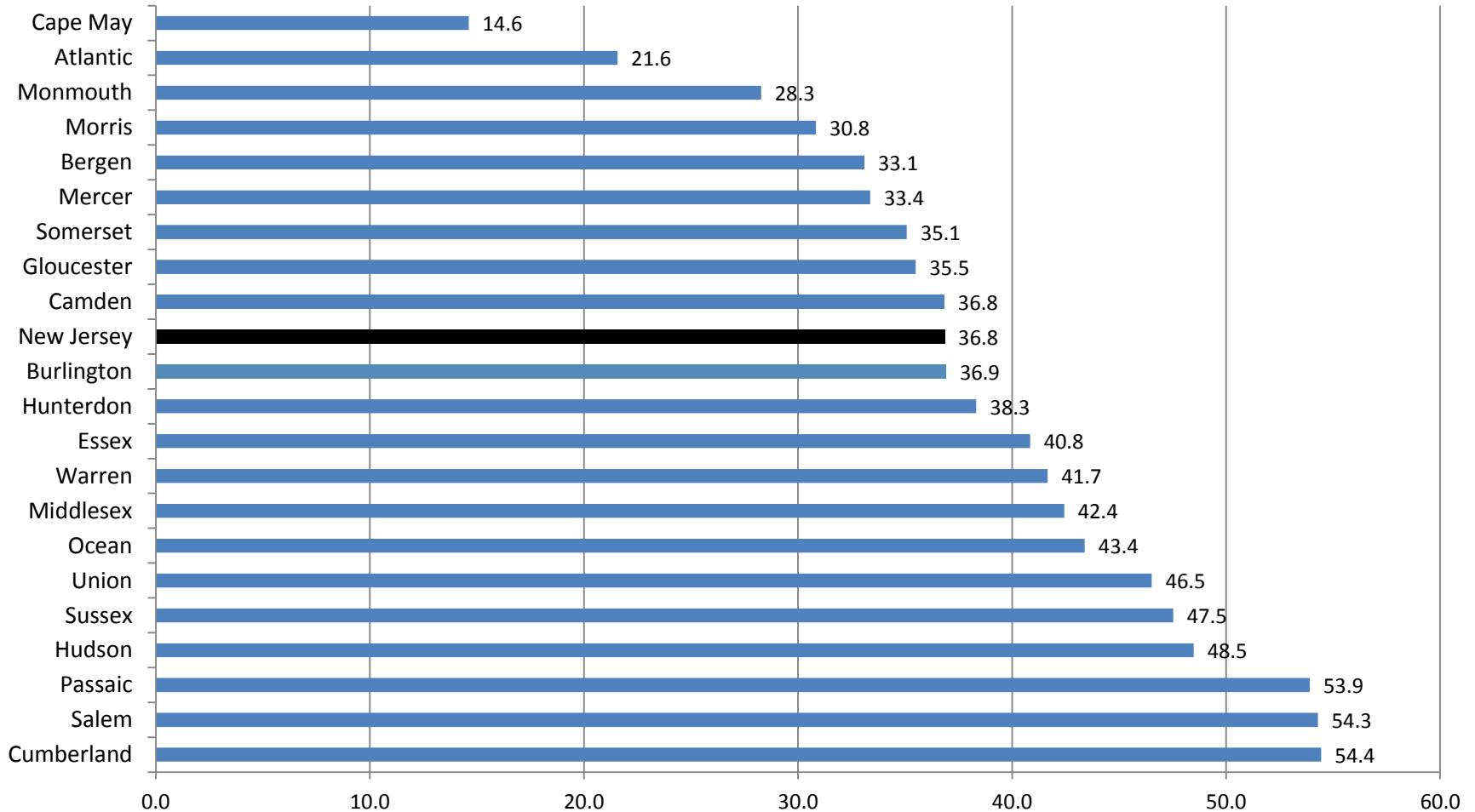
NJ Counties: Number of Residents Per *Accommodations* Job in 2014



NAICS 722 Employment & Population: 2014

Number of County Residents Per Food Services & Drinking Places Job

NJ Counties: Number of Residents Per *Food Service & Drinking Places* Job in 2014



NJ's Top Leisure, Hospitality & Retail Employers

<u>All Employers'</u> <u>Rank</u>		<u>NJ 2015 Employment</u>
1	Wakefern Food Corp. (Shop-Rite)	40,000
2	Wal-Mart Stores	17,405
6	The Home Depot	13,806
12	Caesar's Entertainment	9,151
15	Wawa, Inc.	8,609
16	The Stop & Shop Supermarket Co.	8,567
17	CVS Caremark	8,500
20	Target Corp.	7,846
21	Macy's	7400
22	Lowe's Companies Inc.	6,453
23	Borgata Hotel Casino & Spa	6,317
25	Bed Bath & Beyond	6,000
27	Costco Wholesale	5,761
28	Aramark	5,700
30	ACME Markets	5,200
32	Rite Aid	5,000
40	Six Flags Great Adventure, Wild Safari	4,100
41	Toys "R" Us	4,000

Source: New Jersey Business magazine, August 2015 edition

Top Employers in LHR

- According to New Jersey Business magazine's Top Employers in 2015, eight of New Jersey's top eighteen largest employers fall within leisure, hospitality and retail trade.
- Overall, these 18 employers account for about one of every four to five jobs (21.1%) in the state's LHR industry cluster.



LEISURE, HOSPITALITY & RETAIL

Detailed Industry Occupational Analysis



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New Jersey Resident 2014 Workforce Characteristics: Occupations All Industries in NJ vs. LHR

➤ 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>	<u>All Percent</u>	<u>LHR Percent</u>
Management/Business/Financial	16.2%	9.2%
Scientist/Engineer	6.3%	1.0%
Community/Social services	1.6%	0.0%
Legal services	1.4%	0.1%
Education/Training/Library worker	6.5%	0.3%
Arts/Entertainment	1.8%	2.4%
Health care	7.9%	1.8%
Protective	2.4%	1.3%
Food preparation & service	4.9%	22.5%
Cleaning/Maintenance	3.6%	3.0%
Personal Care	3.6%	4.1%
Sales/Marketing	10.9%	32.1%
Administrative support	13.3%	11.6%
Farming/Fishing/Forestry	0.2%	0.0%
Construction/Extraction	4.4%	0.5%
Installation/Repair	2.7%	2.1%
Production	3.9%	1.8%
Transportation/Material moving	6.7%	6.1%
Military/Never worked	1.6%	N/A

<u>LHR Occupations</u>	<u>2014 Employment</u>	<u>Share of Industry</u>	<u>Minimum Education Requirements</u>
Total ALL Occupations in LHR	814,800	100.0%	
Top 20 Occupations in LHR	585,900	71.9%	
Retail Salespersons	133,250	16.4%	Less than high school
Cashiers	91,030	11.2%	Less than high school
Waiters and Waitresses	56,390	6.9%	Less than high school
Combined Food Preparation and Serving Workers, Including Fast Food	52,020	6.4%	Less than high school
Stock Clerks and Order Fillers	48,210	5.9%	Less than high school
First-Line Supervisors of Retail Sales Workers	28,150	3.5%	High school diploma or equivalent
Food Preparation Workers	24,780	3.0%	Less than high school
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	20,840	2.6%	Less than high school
First-Line Supervisors of Food Preparation & Serving Workers	18,190	2.2%	High school diploma or equivalent
Cooks, Restaurant	17,430	2.1%	Less than high school
Bartenders	15,200	1.9%	Less than high school
Customer Service Representatives	10,150	1.2%	High school diploma or equivalent
Maids and Housekeeping Cleaners	9,360	1.1%	Less than high school
Dining Room and Cafeteria Attendants and Bartender Helpers	9,340	1.1%	Less than high school
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	9,010	1.1%	Less than high school
Dishwashers	8,820	1.1%	Less than high school
Automotive and Watercraft Service Attendants	8,780	1.1%	Less than high school
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	8,500	1.0%	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	8,500	1.0%	Less than high school
Fitness Trainers and Aerobics Instructors	7,950	1.0%	High school diploma or equivalent

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

Source: NJLWD, Occupational Employment Statistics Survey, May 2014
 Prepared by: New Jersey Department of Labor and Workforce Development, August 2015

Wages by Occupation



- 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 in 2014 (\$26,777) followed by arts, entertainment and recreation (\$25,479).
- *Retail salespersons* tended to receive the lowest wages in establishments involved with accommodations and food services (\$23,542).
- 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, \$19,386 - \$20,766.
- 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 \$21,387 (NAICS 72) - \$26,008 (NAICS 71) range.

Wages by Occupation



- Wages paid to *combined food preparation and serving workers*, the cluster's fourth largest, generally paid in the \$9.35 to \$10.75 per hour range (\$19,444 - \$22,387, 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 (\$11.50/hr. & \$23,869/yr.) and 72 Accommodation and Food Services (\$13.25/hr. & \$27,517/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 *chief executives, pharmacists, and software developers*.

LEISURE, HOSPITALITY & RETAIL

Demographic Characteristics of the Industry Cluster Workforce



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New Jersey Resident Workforce Demographic Characteristics

All Industries in NJ vs. LHR: 2014

Age, Sex, Race & Hispanic Origin

➤ 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. One-half (50.0%) of all workers in the cluster are under 35 years old compared with nearly one-third (32.2%) 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. Fifty four percent of the cluster's workforce is male (52.6%, statewide) and 23.0 percent Hispanic vs. 18.9 percent for all industries.

	<u>All</u>	<u>LHR</u>
<u>By Age</u>		
Less than 25	12.0%	27.6%
25-34	20.2%	22.4%
35-44	21.2%	17.1%
45-54	23.5%	16.4%
55-64	17.4%	11.8%
65 & over	5.7%	4.8%
<u>By Sex</u>		
Male	52.6%	54.0%
Female	47.4%	46.0%
<u>By Race</u>		
White	68.3%	67.1%
Black	13.1%	12.9%
Am. Indian/Alaska Native	0.1%	0.2%
Asian	9.5%	8.9%
Native Hawaiian/Pacific Islander	0.0%	0.0%
Some Other Races	7.2%	8.6%
Two or more races	1.7%	2.3%
<u>By Hispanic origin</u>		
Non-Hispanic	81.1%	77.0%
Hispanic	18.9%	23.0%

New Jersey Resident Workforce Characteristics

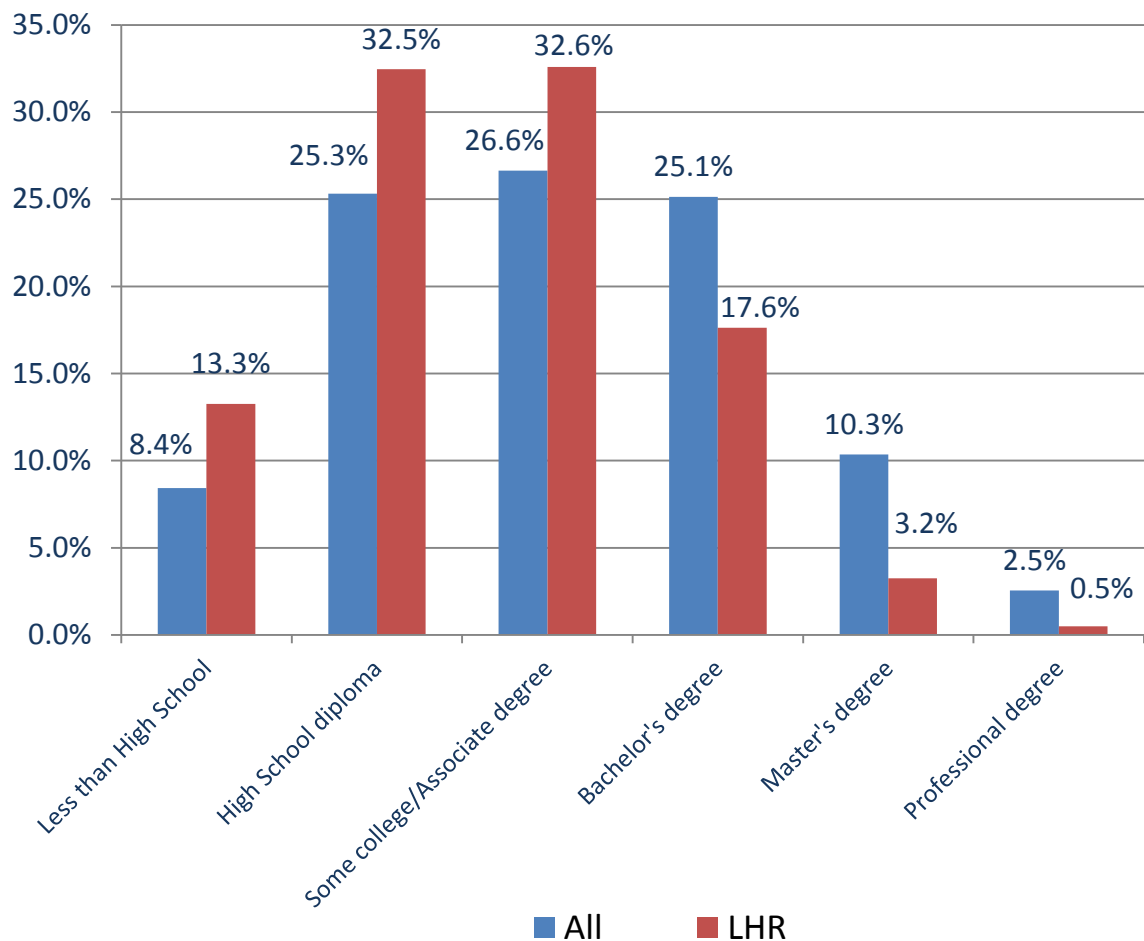
All Industries in NJ vs. LHR: 2014 Earnings

➤ The LHR cluster had a significantly higher proportion than “All industries” in the lowest dollar range in *Personal Earnings*: “Less than \$25,000”.

➤ This is the result of the low paying nature of the occupations in leisure, hospitality and retail industries.

<u>By Personal Earnings</u>	<u>All</u>	<u>LHR</u>
Less than \$25,000	35.2%	60.6%
\$25,000-\$50,000	24.1%	21.4%
\$50,000-\$75,000	16.8%	9.2%
\$75,000-\$100,000	9.3%	3.6%
\$100,000-\$150,000	8.3%	2.9%
\$150,000-\$200,000	2.8%	0.9%
\$200,000 & more	3.5%	1.3%

New Jersey Resident Workforce Characteristics All Industries vs. LHR: 2014 Educational Attainment



- 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 2014 American Community Survey states nearly 1/2 (45.8%) of the workers in this industry cluster do not have any formal education beyond high school compared with about 1/3 (33.7%) for employees in all industries statewide.



LEISURE, HOSPITALITY & RETAIL

Outlook and Projections



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- 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>
Total, All Occupations	4,149,400	4,462,550	313,150	7.5	131,470	34,560	96,910
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

New Jersey, 2012 - 2022
Projected Employment Change by Industry

Industry Title (Two-Digit NAICS)	2012 Jobs	2022 Jobs	Change: 2012-2022		
			Number	Annual Percent	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).

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

NAICS Industry Code	Industry Title	2012	2022	Numeric Change	Annual Growth Rate	Percent Change	Outlook
		Estimated Employment	Projected Employment				
0000	Total All Industries	4,149,400	4,462,550	313,200	0.7	7.5	Growing
1026	Leisure and Hospitality	346,100	371,650	25,550	0.7	7.4	Growing
4400	Retail Trade	443,600	470,850	27,250	0.6	6.1	Growing
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.

➤ Accommodations, 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



- 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>	<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	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



Southern Region Industry Projections: Accommodations & Food Services

<u>County</u>	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate (%)	Total Percent Change	Outlook
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	1.0	Stable
Cumberland	3,200	3,250	50	0.2	1.9	Stable
Gloucester	8,100	8,950	850	1.0	10.4	Growing
Salem	1,350	1,400	50	0.4	4.1	Stable



Central Region Industry Projections: Retail Trade

<u>County</u>	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate (%)	Total Percent Change	Outlook
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



Central Region Industry Projections: Accommodations & Food Services

<u>County</u>	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate (%)	Total Percent Change	Outlook
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



Northern Region Industry Projections: Retail Trade

<u>County</u>	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate (%)	Total Percent Change	Outlook
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
Somerset	19,950	22,100	2,150	1.0	10.7	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



Northern Region Industry Projections: Accommodations & Food Services Trade

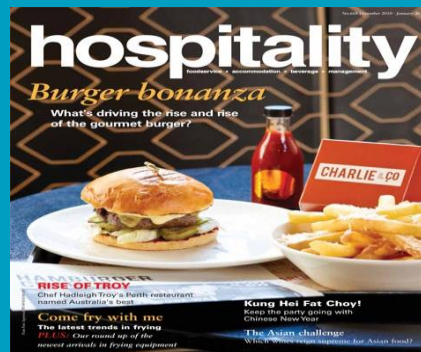
<u>County</u>	2012 Estimated Employment	2022 Projected Employment	Numeric Change	Annual Growth Rate (%)	Total Percent Change	Outlook
Bergen	29,050	32,800	3,750	1.2	12.9	Growing
Essex	20,300	22,400	2,050	1.0	10.1	Growing
Hudson	14,700	17,100	2,400	1.5	16.3	Growing
Hunterdon	3,450	4,000	550	1.5	16.4	Growing
Morris	17,750	19,100	1,300	0.7	7.4	Growing
Passaic	10,000	10,550	550	0.5	5.6	Growing
Somerset	10,650	11,450	800	0.7	7.4	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



Outlook



- 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.

This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The product was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor.

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