



ADVANCING
CAREERS IN

RETAIL

Baltimore: Labor
Analysis Report

This report was prepared by the Baltimore Metropolitan Council for The Baltimore Workforce Funders Collaborative and the Civic Works Baltimore Center for Green Careers.

Advancing Careers in Retail - Baltimore Labor Market Analysis

Introduction and Executive Summary

This report was prepared for the Baltimore Workforce Funders Collaborative as part of Advancing Careers in Retail-Baltimore, a partnership aimed at improving job quality and advancement opportunities for frontline workers in Baltimore's retail sector and the adjacent food/beverage service sector. Advancing Careers in Retail- Baltimore involves a core group of implementation partners including Civic Works, Humanim and the Choice Program at the University of Maryland Baltimore County.

Through this initiative, workforce development organizations are partnering with businesses to overcome challenges to finding and retaining skilled employees while identifying resources, providing technical assistance, and facilitating peer learning to benefit frontline workers. This report was funded with support from Walmart Giving and the National Fund for Workforce Solutions.

The purpose of this report is to provide information on the labor market for the retail trade and food services/drinking places sectors in Baltimore City. The report begins by providing an overview of the role of these sectors in the context of the city's economy. Data points considered include employment by sector, gross regional product, and number of establishments. The next section examines the demographic composition of the workers employed in the retail trade and food services/drinking places sectors, focusing on sex, race, age, and educational attainment characteristics. The report then considers the sectors themselves and the industries and occupations that compose them.

The principal sources utilized in the analysis are Economic Modeling Specialists International (EMSI) Inc for the sector, industry, and occupational estimates and projections, and the Census Bureau's Quarterly Workforce Indicators data set for the demographic characteristics of the workers. EMSI is the primary source unless otherwise noted. While most of the report focuses on the labor market in Baltimore City, employment figures for the Baltimore region are also included to provide additional context. For the purposes of this report, the Baltimore region is defined as Baltimore City, Anne Arundel County, and Baltimore County.

Key findings from the report include:

1. The food services/drinking places and retail trade sectors had the 6th and 7th highest employment in 2016, respectively, among all Baltimore City sectors. Collectively, they account for 10.7% of citywide employment (5.9% and 4.8%).

2. Employment growth in Baltimore City was relatively flat from 2006 to 2016, with an average annual growth rate of -.4%. Over the same period, retail trade employment in the City lagged behind total employment growth, with an average annual growth rate of -1.8% from 2006 to 2016. Growth rates in the food services/drinking places sector (average annual growth rate of .7%), outpaced those for total employment. This trend is projected to continue from 2016 to 2021.
3. While the retail trade and food services/drinking places sectors account for relatively large percentages of employment, they are not among the leading sectors for Gross Regional Product (GRP).
4. Retail trade is the leading sector for payrolled business locations at 14.2% in Baltimore City. Together, the retail trade and food services/drinking places sectors account for more than a quarter of payrolled business locations in Baltimore City.
5. 90% of Baltimore City retail establishments employ fewer than 20 people.
6. Retail trade and food services/drinking places sectors employ a larger number of younger workers than other sectors (20.7% of retail workers and 26.7% of food services/drinking places workers were under the age of 25 in 2016.)
7. The retail trade and food services/drinking places sectors employ a high number of workers with highest level of educational attainment being a high school diploma or less (39.3% and 39.2% respectively).
8. Average annual wages in the retail trade (\$28,117) and food services/drinking places (\$21,603) sectors are lower than in any other sector in Baltimore City. At \$63,227, the average annual wage across all sectors is more than double that for retail trade and nearly triple that for food services/drinking places.
9. The top 3 occupations in retail (cashiers, retail salespersons, and stock clerks and order fillers) account for more than 50% of total retail trade sector employment. The top 2 occupations in food services/drinking places (waiters and waitresses and combined food preparation and serving workers, including fast food) alone account for 35.5% of total sector employment. These are entry-level positions requiring no formal educational credential, no experience, and short-term on-the-job training.
10. Gender and racial disparities for managerial level occupations are significant. Managerial jobs common to the retail sector are held disproportionately by men (68%) and by whites (71%). This trend is also evident in managerial occupations common

to the food services/drinking places sector where men (68%) and white persons (69%) are also disproportionately represented.¹

11. Compared to the split for all occupations, African American (46.3%) workers are overrepresented in entry-level positions common to the retail sector and women (60.4%) are overrepresented in entry-level positions common to the food services/drinking places sector.²
12. The vast majority of hiring in both sectors is to replace individuals moving out of occupations within the sector and not from new-job growth.

¹ The percentages by race and gender are not specific to the retail trade and food services/drinking places sectors as sector-specific demographic data for occupations were not available. While the managerial occupations chosen are common in the retail trade and food services/drinking places sectors, the percentages represent the share of these workers in the entire Baltimore City economy.

² The percentages by race and gender are not specific to the retail trade and food services/drinking places sectors as sector-specific demographic data for occupations were not available. While the entry-level occupations chosen are common in the retail trade and food services/drinking places sectors, the percentages represent the share of these workers in the entire Baltimore City economy.

Regional and Citywide Context – Employment, GRP, and Establishments

Employment

The retail trade and food services/drinking places sectors comprise significant portions of both Baltimore region and Baltimore City employment. Retail trade employment exceeds that for food services/drinking places in the Baltimore region, while the reverse is true in Baltimore City. Among Baltimore region sectors, the retail trade and food services/drinking places sectors had the 3rd and 4th highest employment in 2016, respectively. Collectively, they account for 17.5% of regional employment (9.9% and 7.6%). Both sectors account for smaller, yet still significant, portions of employment in Baltimore City. The food services/drinking places and retail trade sectors had the 6th and 7th highest employment in 2016, respectively. Collectively, they account for 10.7% of citywide employment (5.9% and 4.8%).

Annual employment growth rates from 2006 to 2016 and projected annual employment growth rates from 2016 to 2021 are depicted in figures 6 and 7.

Overall, retail trade employment declined in both the region and the city from 2006 to 2016 at annual rates of -.6% and -1.8%, respectively. Both geographies showed similar patterns of declining employment from 2006 to 2010 followed by brief recoveries over the next few years. However, regional retail trade employment is projected to grow slowly from 2016 to 2021 at an annual rate of .4% while employment is expected to continue to fall in Baltimore City at an annual rate of -.5%.

Conversely, food services/drinking places employment has grown in both the region and the city from 2006 to 2016 at annual rates of 1.8% and .7%, respectively. Both geographies experienced declines in employment from 2007 through 2010 followed by steady increases through 2016. Employment growth is projected to continue at annual rates of 1.6% and 1.1% in the region and city, respectively, from 2016 to 2021.

Total employment figures help to give context to employment in the retail trade and food services/drinking places sectors. Annual total employment growth rates from 2006 to 2016 in the region and city were .3% and -.4%, respectively. Growth in the retail trade sector lagged behind total employment growth from 2006 to 2016. Over the same period, growth rates in the food services/drinking places sector outpaced those for total employment. This trend is projected to continue from 2016 to 2021, with total employment projected to grow at annual rates of 1.3% and .7% in the region and the city, respectively.

Figure 1. Baltimore City and Region Employment by Sector, 2016

NAICS	Sector	2016 Jobs in Baltimore City	% of Total Jobs in Baltimore City	2016 Jobs in the Baltimore Region	% of Total Jobs in Baltimore Region
62	Health Care and Social Assistance	75,037	22.3%	165,948	17.0%
90	Government	68,823	20.4%	170,714	17.4%
61	Educational Services	25,621	7.6%	37,716	3.9%
56	Administrative and Support and Waste Management and Remediation Services	22,200	6.6%	68,311	7.0%
54	Professional, Scientific, and Technical Services	20,390	6.0%	72,705	7.4%
722	Food Services and Drinking Places	19,906	5.9%	73,879	7.6%
44-45	Retail Trade	16,093	4.8%	97,258	9.9%
48	Transportation and Warehousing	14,935	4.4%	34,522	3.5%
23	Construction	11,028	3.3%	50,721	5.2%
52	Finance and Insurance	11,027	3.3%	40,566	4.1%
81	Other Services (except Public Administration)	10,726	3.2%	32,603	3.3%
31	Manufacturing	10,490	3.1%	35,931	3.7%
42	Wholesale Trade	6,945	2.1%	27,877	2.8%
71	Arts, Entertainment, and Recreation	6,113	1.8%	18,504	1.9%
53	Real Estate and Rental and Leasing	5,422	1.6%	17,405	1.8%
51	Information	4,201	1.2%	11,525	1.2%
721	Accommodation	3,108	0.9%	7,211	0.7%
22	Utilities	3,009	0.9%	5,303	0.5%
55	Management of Companies and Enterprises	2,113	0.6%	8,912	0.9%
11	Agriculture, Forestry, Fishing and Hunting	<10	0.0%	609	0.1%
21	Mining, Quarrying, and Oil and Gas Extraction	<10	0.0%	150	0.0%
99	Unclassified Industries	0	0.0%	0	0.0%
	Total	337,196	100.0%	978,371	100.0%

Figure 2. Baltimore City Employment in the Retail Trade and Food Services/Drinking Places Sectors, 2006-2021

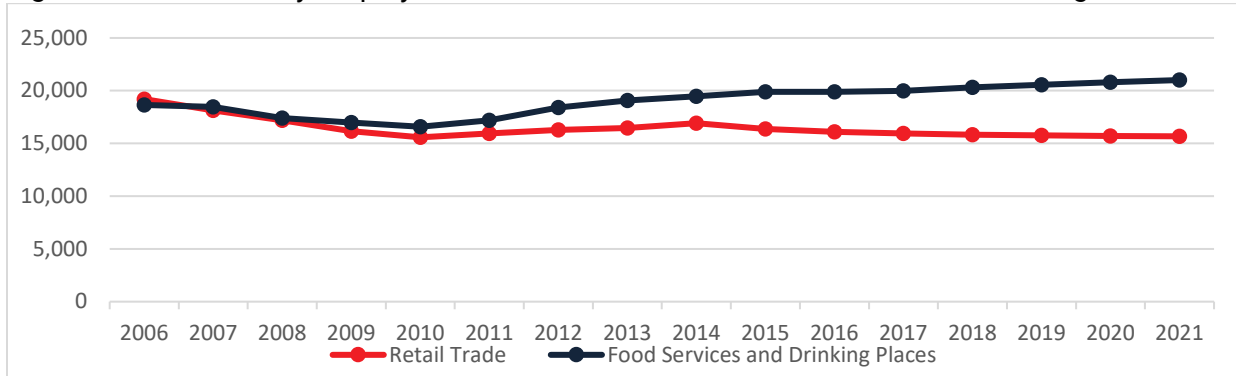


Figure 3. Total Baltimore City Employment, 2006-2021

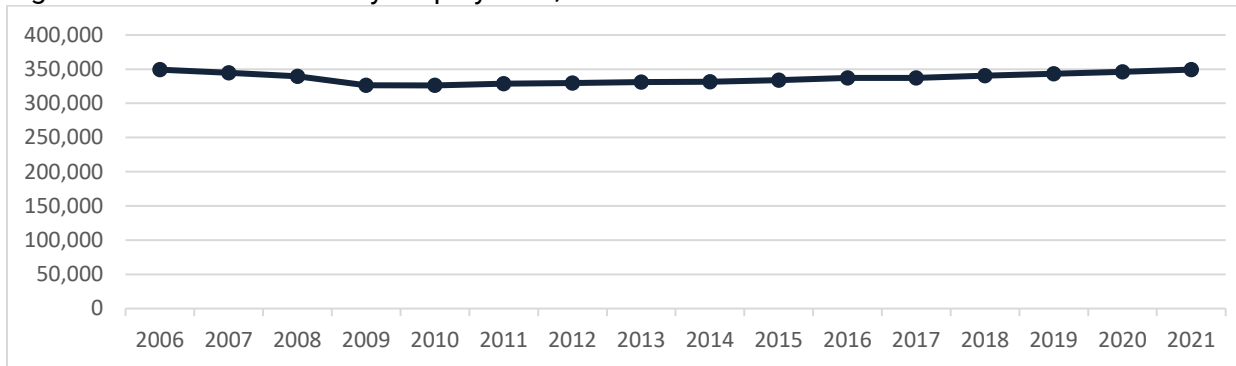


Figure 4. Baltimore Region Employment in the Retail Trade and Food Services/Drinking Places Sectors, 2006-2021

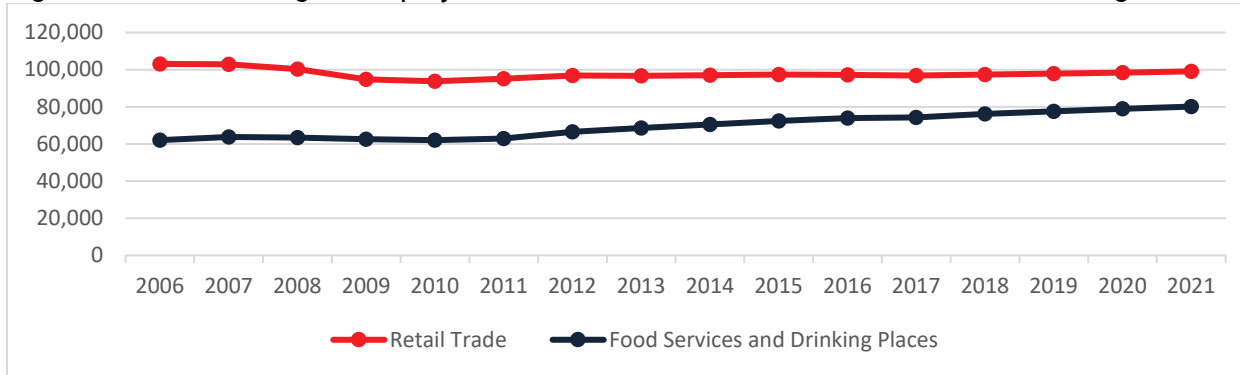


Figure 5. Total Baltimore Region Employment, 2006-2021

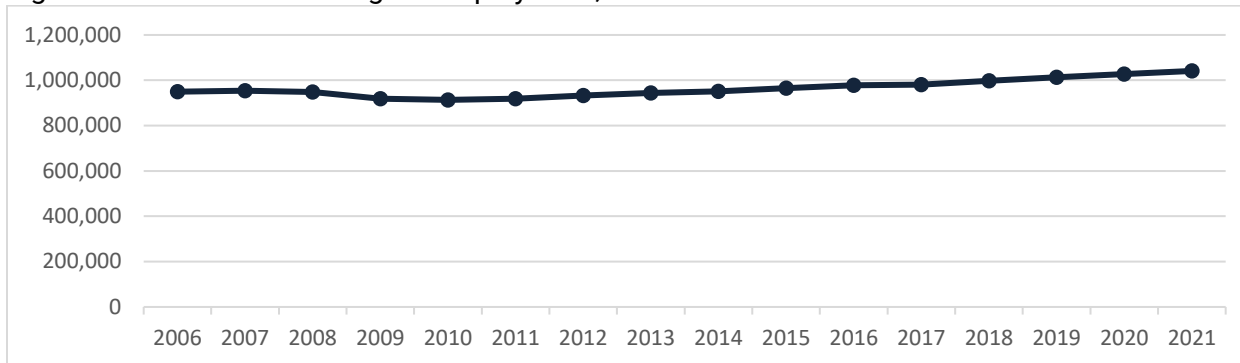


Figure 6. Average Annual Growth Rate, 2006-2016

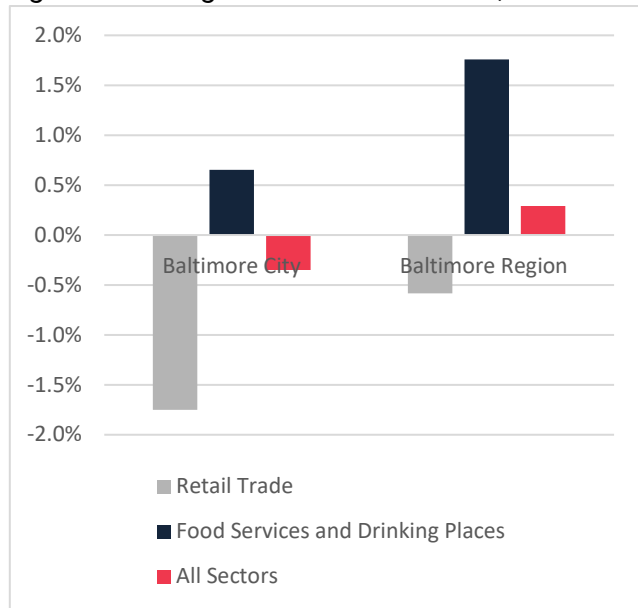
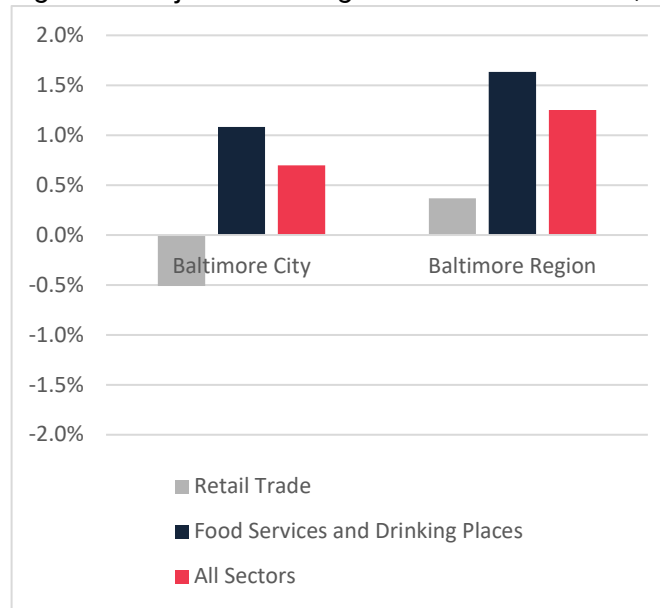


Figure 7. Projected Average Annual Growth Rate, 2016-2021



Gross Regional Product

While the retail trade and food services/drinking places sectors account for relatively large percentages of employment, they are not among the leading sectors for Gross Regional Product (GRP). The retail trade and food services/drinking places sectors collectively account for 3.7% of citywide GRP at 2.1% and 1.6%, respectively. While GRP in the retail trade sector exceeds that for food services/drinking places, the margin of the difference decreased from 2007 through 2016 due to more robust growth in the food services/drinking places sector. Retail trade sector GRP exceeded that for food services/drinking places by 50% in 2007. By 2016, retail trade GRP was just 27% higher.

Both sectors experienced positive annual average GRP growth from 2007 through 2016. Similar to employment growth, annual GRP growth in the food services/drinking places sector exceeded that for retail trade with annual growth rates of 2.9% and 1.0%, respectively. Both sectors experienced more robust growth over the past 5 years. GRP in the food services/drinking places sector grew at an annual rate of 5.3% while GRP in the retail trade sector grew at an annual rate of 2.1% from 2011 to 2016. Food

services/drinking places GRP grew at a faster rate than economy-wide GRP while growth in the retail trade sector fell short of economy-wide GRP growth.

Figure 8. Baltimore City Gross Regional Product (GRP) by Sector, 2016

NAICS	Sector	2016 Baltimore City GRP (in millions)	% of Total 2016 GRP
90	Government	\$7,942.695	17.7%
62	Health Care and Social Assistance	\$6,364.083	14.2%
52	Finance and Insurance	\$3,927.958	8.8%
61	Educational Services	\$3,419.341	7.6%
99	Unclassified Industries	\$3,336.875	7.5%
54	Professional, Scientific, and Technical Services	\$3,186.971	7.1%
22	Utilities	\$2,353.014	5.3%
48	Transportation and Warehousing	\$1,817.595	4.1%
53	Real Estate and Rental and Leasing	\$1,639.916	3.7%
31	Manufacturing	\$1,590.696	3.6%
42	Wholesale Trade	\$1,403.370	3.1%
23	Construction	\$1,401.504	3.1%
56	Administrative and Support and Waste Management and Remediation Services	\$1,316.729	2.9%
51	Information	\$1,157.815	2.6%
81	Other Services (except Public Administration)	\$943.345	2.1%
44-45	Retail Trade	\$934.445	2.1%
71	Arts, Entertainment, and Recreation	\$833.362	1.9%
722	Food Services and Drinking Places	\$735.814	1.6%
721	Accommodation	\$274.065	0.6%
55	Management of Companies and Enterprises	\$206.669	0.5%
11	Agriculture, Forestry, Fishing and Hunting	\$1.081	0.0%
21	Mining, Quarrying, and Oil and Gas Extraction	\$0.755	0.0%
	Total	\$44,788.098	100.0%

Figure 9. Baltimore City GRP in the Retail Trade and Food Services/Drinking Places Sectors, 2007-2016

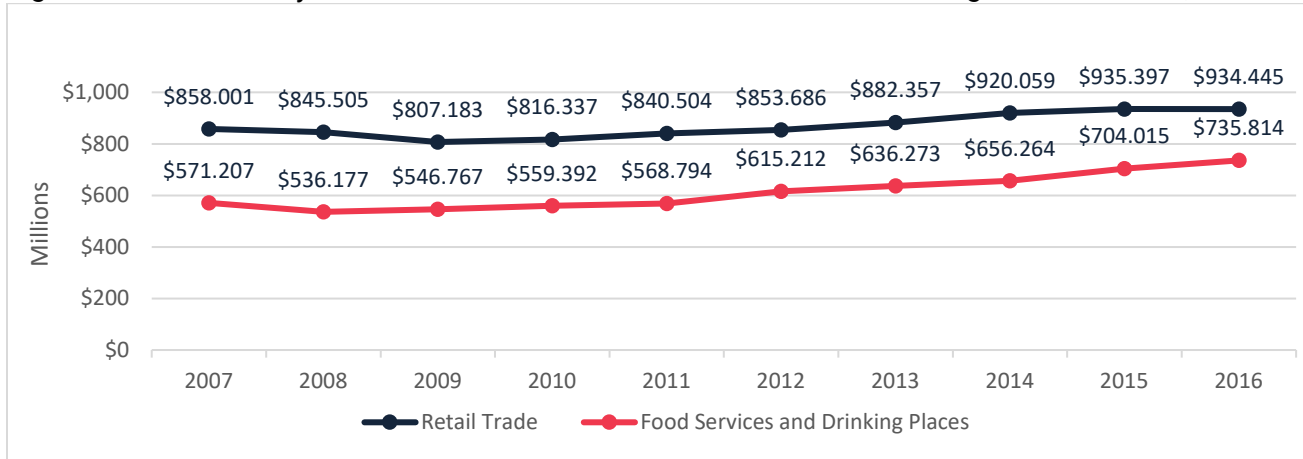
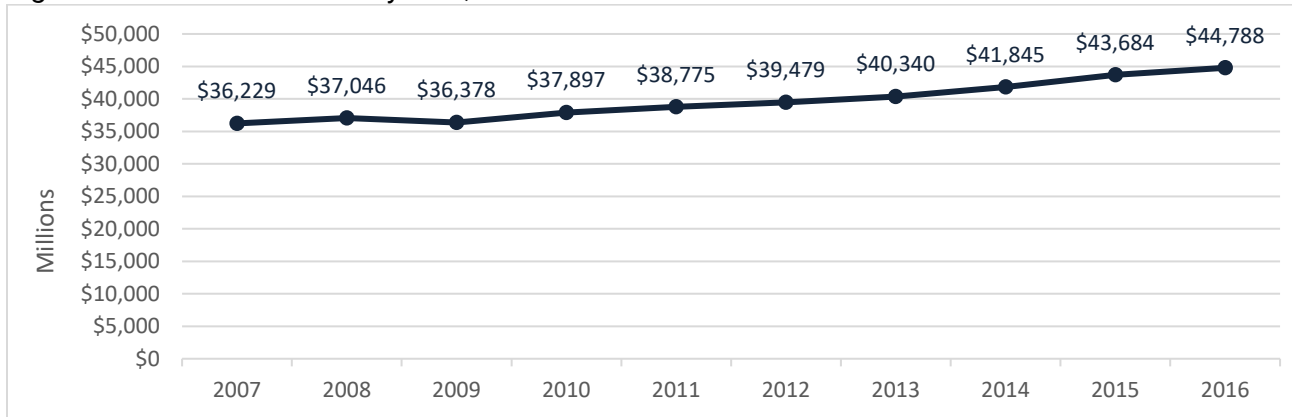


Figure 10. Total Baltimore City GRP, 2007-2016



Establishments

The retail trade and food services/drinking places sectors account for large percentages of total payrolled business locations in Baltimore City. Retail trade is the leading sector for payrolled business locations at 14.2% while food services/drinking places is the 4th largest sector at 11.2%. Collectively, these sectors account for more than a quarter of payrolled business locations in Baltimore City.

Figure 11. Baltimore City Payrolled Business Locations by Sector, 2016

NAICS	Sector	2016 Payrolled Business Locations in Baltimore City	% of Total
44-45	Retail Trade	1,956	14.2%
54	Professional, Scientific, and Technical Services	1,820	13.2%
81	Other Services (except Public Administration)	1,672	12.1%
722	Food Services and Drinking Places	1,540	11.2%
62	Health Care and Social Assistance	1,488	10.8%
23	Construction	752	5.5%
53	Real Estate and Rental and Leasing	715	5.2%
56	Administrative and Support and Waste Management and Remediation Services	710	5.1%
42	Wholesale Trade	592	4.3%
52	Finance and Insurance	555	4.0%
90	Government	423	3.1%
31	Manufacturing	419	3.0%
48	Transportation and Warehousing	370	2.7%
61	Educational Services	253	1.8%
51	Information	204	1.5%
71	Arts, Entertainment, and Recreation	196	1.4%
55	Management of Companies and Enterprises	61	0.4%
721	Accommodation	52	0.4%
22	Utilities	12	0.1%
11	Agriculture, Forestry, Fishing and Hunting	3	0.0%
21	Mining, Quarrying, and Oil and Gas Extraction	1	0.0%
99	Unclassified Industries	Insufficient Data	0.0%
	Total	13,794	100.0%

Retail establishments are more concentrated in the smaller establishment size categories than establishments across all sectors. However, a small establishment size does not necessarily indicate that it is a “small business.” One large enterprise may own or operate many establishments. The majority of establishments in the retail sector fall into the smallest size categories (as measured by number of employees), with 77.7% having fewer than 10 employees, while the all sectors category has 70.0% of firms with fewer than 10 employees. Conversely, retail has only 9.9% of firms with 20 employees or more, while the all sectors combined category has 17.2% of firms with 20 employees or more.

The data for number of establishments by establishment size is not available at the three-digit NAICS industry level. The data is available at the two-digit industry, Accommodation and Food Services. The Accommodation sector accounts for approximately 3.0% of payrolled accommodation and food services business locations in Baltimore City. Major business types in the Accommodation sector include hotels, bed and breakfast inns, campgrounds, and rooming and boarding houses. Accommodation and food services establishments are less concentrated in the smallest firm size categories than establishments in retail and establishments across all sectors. Although the majority of establishments in the accommodation and food services sector fall into the smallest establishment size categories, establishments in this sector are less concentrated in these sizes than establishments in retail and all sectors combined. While 62.7% of accommodation and food services establishments have fewer than 10 employees, this share is lower than the shares of this establishment size for both retail (77.7%) and all sectors (70.0%). At the same time, the accommodation and food services sector has a higher concentration of establishments in the larger size categories, with 23.7% of firms having 20 employees or more, while retail has 9.9% of establishments in this size category, and all sectors has 17.2% of establishments with 20 employees or more.

Figure 12. Share of Establishments by Establishment Size, Baltimore City: 2015

Establishment Size (Employees)	Retail	Accommodation and Food Svcs	All Industries
1 to 4	59.0%	46.9%	52.2%
5 to 9	18.6%	15.9%	17.8%
10 to 19	12.4%	13.5%	12.8%
20 to 49	7.0%	16.3%	10.1%
50 to 99	1.7%	5.4%	3.8%
100 to 249	1.1%	1.7%	2.3%
250 to 499	0.1%	0.3%	0.7%
500 +	0.0%	0.1%	0.4%
All Establishments	100.0%	100.0%	100.0%

Source: U.S. Census Bureau, County Business Patterns.

Retail Trade and Food Services/Drinking Places – Sector Demographics

It has been established in this report that the retail and food services/drinking places sectors serve as key contributors to the economy of Baltimore City, collectively accounting for 10.7% of city-wide employment in 2016. What is the demographic composition of the workers employed in these sectors? What changes have occurred in the demographic composition of the workers employed in these sectors over the course of the past ten years? The following section takes a closer look at the workers that are employed in the retail and food services/drinking places sectors in Baltimore City, focusing on sex, race, age, and educational attainment characteristics.

Note: Observations on employment growth by demographic characteristics are based solely upon employment data by sector and characteristic. Analysis regarding the cause of growth or decline of employment by characteristic is not contained in this report. Other considerations having the potential to impact the demographic composition of the retail and food services/drinking places workforce would include (but are not limited to) demographic shifts for the population as a whole, changes in labor force composition, and variance in unemployment rates across demographic characteristics.

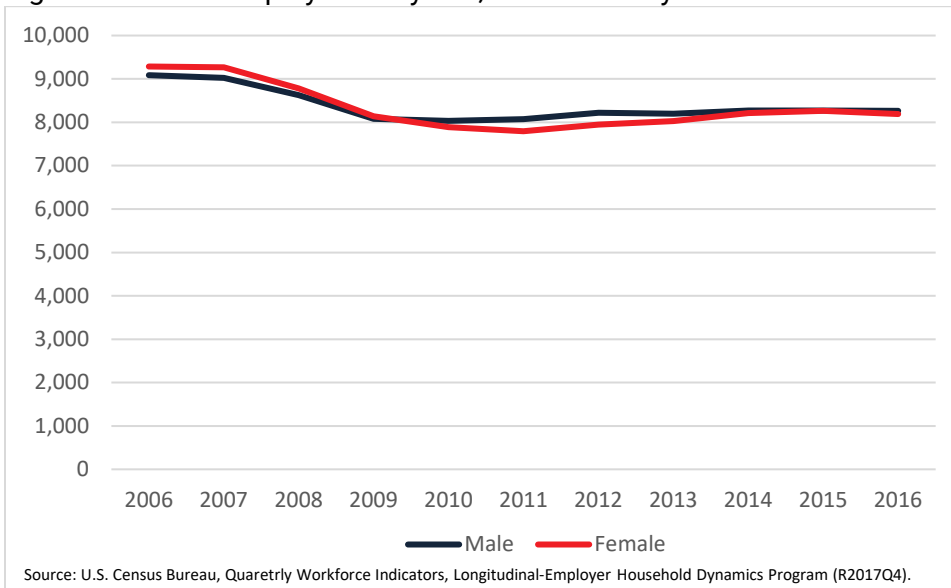
Sex

In Baltimore City there are fewer males than females employed, and the female share of total employment has increased slightly over the course of the 2006-2016 time period (from 53.5% in 2006 to 54.0% in 2016). In the case of the retail and food services/drinking places sectors, employment has been more evenly split between the sexes (retail was 49.8% male and food services/drinking places was 48.9% male in 2016). However, female employment has been declining more quickly in retail than male employment, and male employment has been increasing more quickly in the food services and drinking places sector than female employment.

Retail

Over the course of the past ten years, employment in the retail sector has been evenly split between females and males in Baltimore City, with shares of either sex comprising between 49% and 51% throughout the time period. While employment in the retail sector has been declining overall, female employment in the sector decreased at a slightly quicker annual rate than male employment from 2006-2016 in Baltimore City (-1.2% female employment, -0.9% male employment). In Baltimore City females accounted for 57.0% (-1,093/-1,916) of the 2006-2016 negative growth in the retail sector.

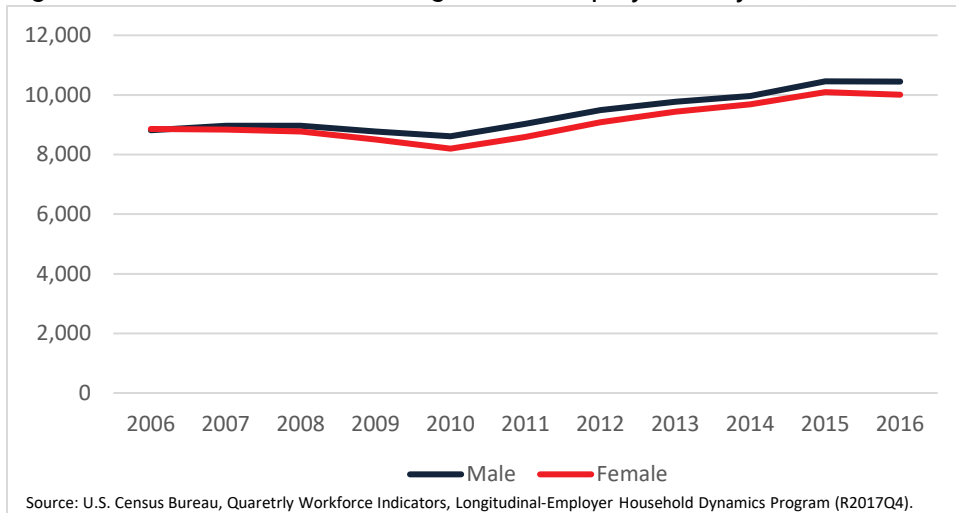
Figure 13. Retail Employment by Sex, Baltimore City: 2006-2016



Food services/drinking places

Similar to the retail sector, employment in the food services/drinking places sector has been evenly split between females and males in Baltimore City, with shares of either sex comprising between 49% and 51% throughout the time-period. While employment in the food services/drinking places sector has been increasing overall, female employment in the sector increased at a slower annual rate than male employment from 2006-2016 in Baltimore City (1.2% female annual growth, 1.7% male annual growth). In Baltimore City males accounted for 58.7% (1,629/2,776) of the 2006-2016 employment growth in the food services/drinking places sector.

Figure 14. Food Services/Drinking Places Employment by Sex, Baltimore City: 2006-2016



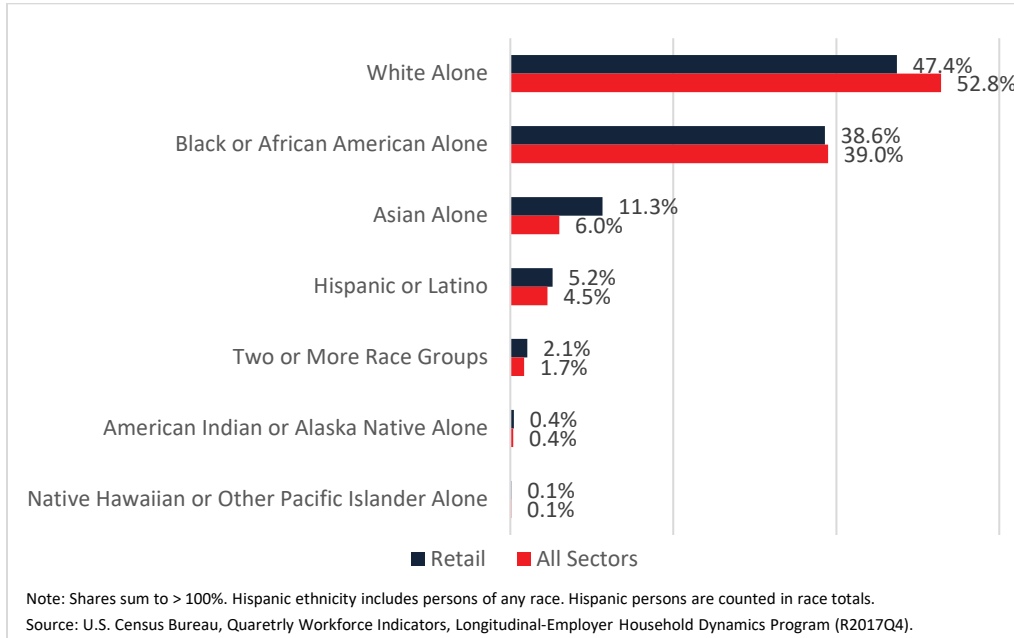
Race

Over the course of the 2006-2016 time-period, white employment in Baltimore City declined at an annual rate of -0.5%, and comprised 54.7% of total employment in 2006 and 52.8% in 2016. Conversely, non-white employment increased over the time period (at an annual rate of 0.3%), and gained accordingly in share of total employment. The Asian alone and two or more race groups race categories drove the growth in non-white employment over the time period (with increases of 3.1% and 2.5% annually), as black or African American employment decreased at a pace of -0.2% annually. While the Asian alone and two or more race groups race categories have larger growth rates in employment than African Americans, they comprise a much smaller (although growing) proportion of total employment. The Asian alone category comprised 6.0% of total employment and the two or more race groups category comprised 1.7% of total employment in 2016.

Retail

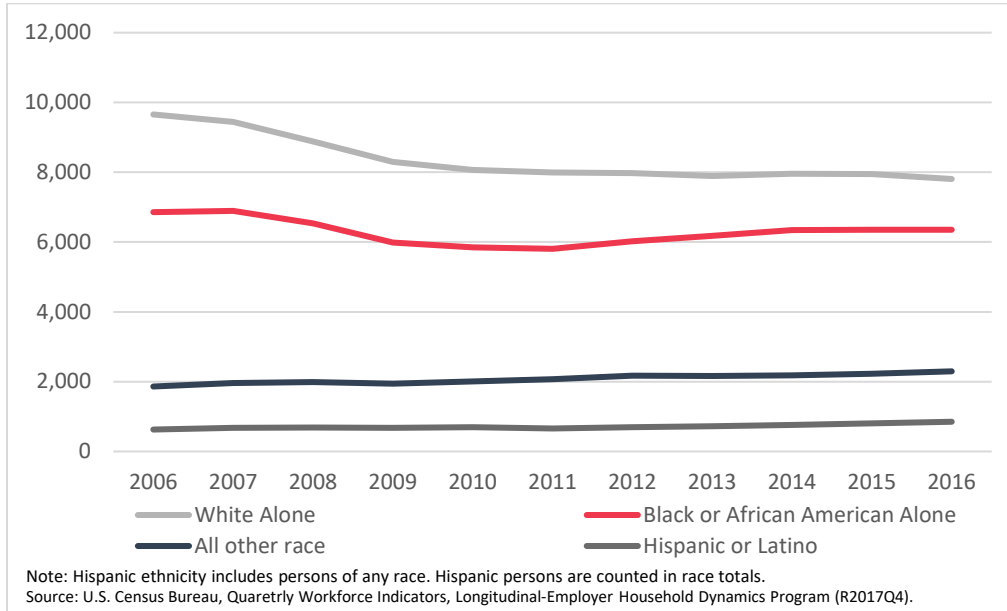
In 2016, a small majority of retail employment in Baltimore City was non-white (52.6%). Non-white employment in Baltimore City is more concentrated in the retail sector than in all sectors combined (47.2%).

Figure 15. Retail Employment by Race/Ethnicity, Baltimore City: 2016



In Baltimore City from 2006 to 2016, employment in the retail sector declined most quickly for whites (-2.1% annually) and at a slower rate for African Americans (-0.8% annually). After declining through the early portions of the time period (through 2011), African American employment in the retail sector experienced positive growth through 2014 and stabilized in the subsequent years. Employment increased from 2006-2016 in retail for the remaining race categories. Asian employment increased at an annual rate of 2.2% over the time period, and accounted for 11.3% of total retail employment in 2016.

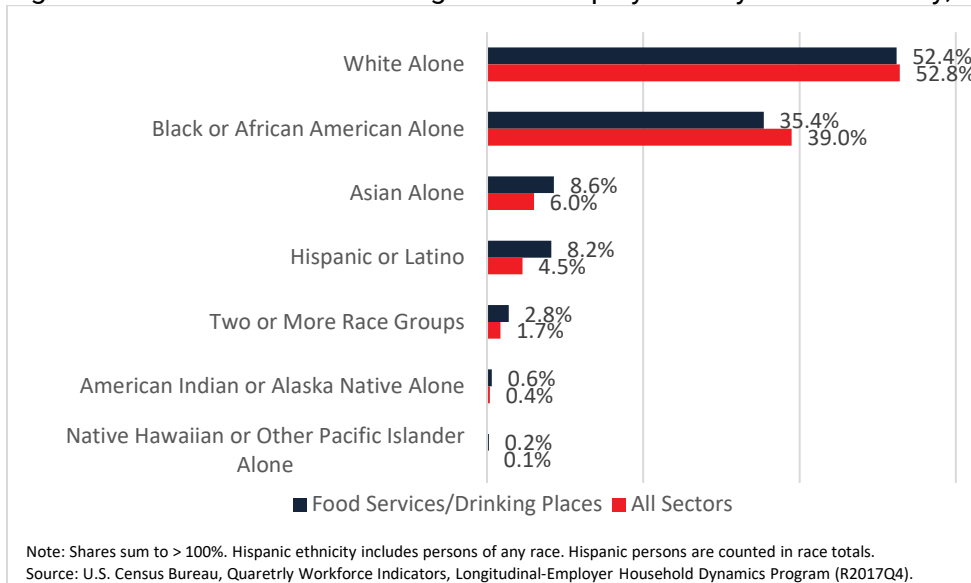
Figure 16. Retail Employment by Race/Ethnicity, Baltimore City: 2006-2016



Food services/drinking places

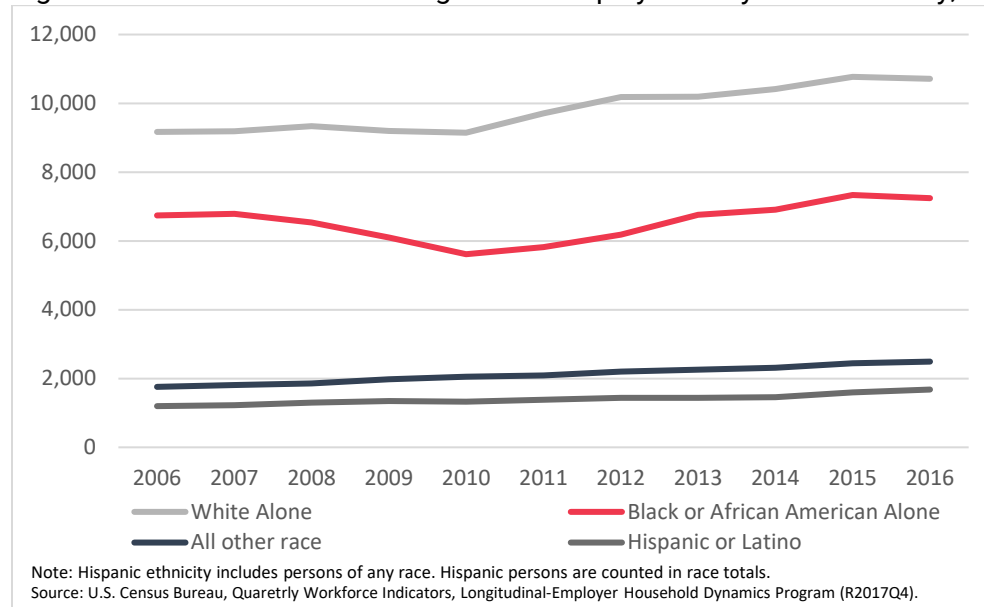
A small majority (52.4%) of food services/drinking places employment in Baltimore City was white in 2016, and the concentration of white employment in this sector was similar to what it was for all sectors (52.8%). The concentration of African American employment in this sector (35.4%) is slightly below the concentration of African American employment across all sectors (39.0%).

Figure 17. Food Services/Drinking Places Employment by Race/Ethnicity, Baltimore City: 2016



All races experienced positive employment growth in the food services/drinking places sector in Baltimore City from 2006-2016. White employment growth (1.6% annual growth) slightly outpaced non-white employment growth (1.4%) in the food services/drinking places sector. The increase in non-white employment was fueled by Asian and African American workers, experiencing 3.5% and 0.7% annual growth over the time period, respectively. African American employment in the food services/drinking places sector declined in the early portion of the time period, decreasing at a 4.5% annual rate from 2006-2010, before recovering with annual growth of 4.3% from 2010-2016.

Figure 18. Food Services/Drinking Places Employment by Race/Ethnicity, Baltimore City: 2006-2016



Age

Across all sectors in 2016, 67.1% of workers were 35 years of age and above. While there was some fluctuation between age groups in the 35+ age range, the share has remained relatively constant over the time period, as it represented 68.8% of workers in 2006. The concentration of employment in the 35+ age range in the retail and food services/drinking places sectors is much lower, at 55.1% and 42.7% in 2016, respectively.

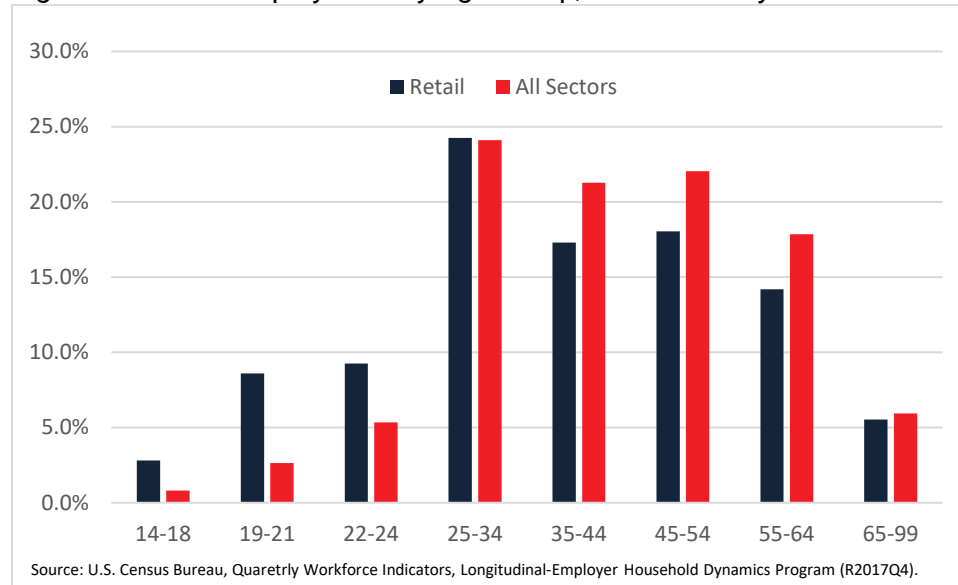
Employment in the retail and food services/drinking places sectors skews toward the younger age groups relative to workers in all sectors.

Retail

Compared to employment across all sectors, employment in the retail sector is further concentrated in the younger age groups. In 2016, 20.7% of retail employment in Baltimore City was younger than 25 years old, while only 8.8% of employed workers in all sectors were younger than 25 years of age. While the concentration of workers under 25 years of age remains high in retail (relative to all

sectors), it has decreased since the 2006 level of 23.0%. The observed decline in share of the under 25 age group was driven by the 53.7% decrease in the 14 to 18 years of age category.

Figure 19. Retail Employment by Age Group, Baltimore City: 2016



Food services/drinking places

Employment is more concentrated in younger age groups in the food services/drinking places sector than in retail (with 26.7% of workers under 25 years of age in food services/drinking places, as compared to 20.7% in retail). While the concentration of workers under 25 years of age remains high in the food services/drinking places sector (relative to all sectors), it has decreased since the 2006 level of 32.8%. The observed decline in share of the under 25 age group was driven by the 35.0% decrease in the 14 to 18 years of age category. In the food services/drinking places sector, the skew extends beyond age 24, continuing through age 34. In Baltimore City, 57.3% of food services/drinking places employment is younger than 35 years old, while 32.9% of all employed workers are younger than 35.

Figure 20. Food Services/Drinking Places Employment by Age Group, Baltimore City: 2016



Educational Attainment

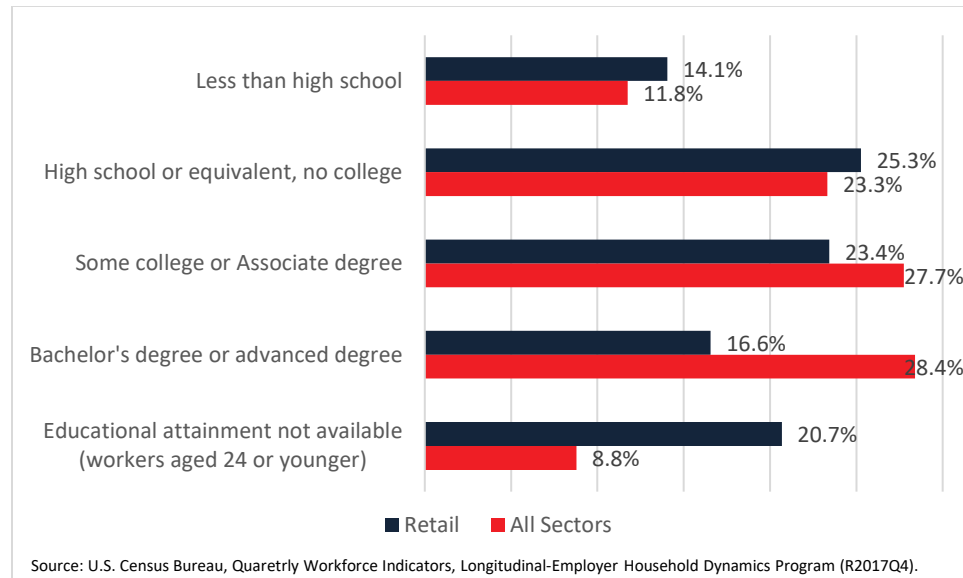
The educational attainment metric in this report is defined as the highest level of education completed by the population 25 years of age and above. As reported previously, the retail and food services/drinking places sectors employ a higher proportion of young workers than all sectors combined. As a result, the share of all retail and food services/drinking places workers that is available to be classified by educational attainment category is lower than for all sectors combined.

Retail

In the retail sector, the “Educational attainment not available” category (workers aged 24 or younger) accounts for 20.7% of workers in 2016, and only 8.8% of workers in all sectors in Baltimore City. Compared to all sectors, the educational attainment of workers in the retail sector is lower. The share of workers in Baltimore City in retail with an educational attainment of high school equivalent or less (39.3%) exceeds the share of workers in all sectors for those attainment categories (35.1%). On the higher end of the educational attainment spectrum, the share of workers in retail in the “some college or associate’s degree” and “bachelor’s degree or advanced degree” categories (40.0%) is significantly lower than for workers in all sectors (56.1%).

In the retail sector in Baltimore City, the bachelor’s degree or advanced degree category was the only educational attainment level with an increase in employment from 2006-2016 (+0.5% annual growth).

Figure 21. Retail Employment by Educational Attainment, Baltimore City: 2016

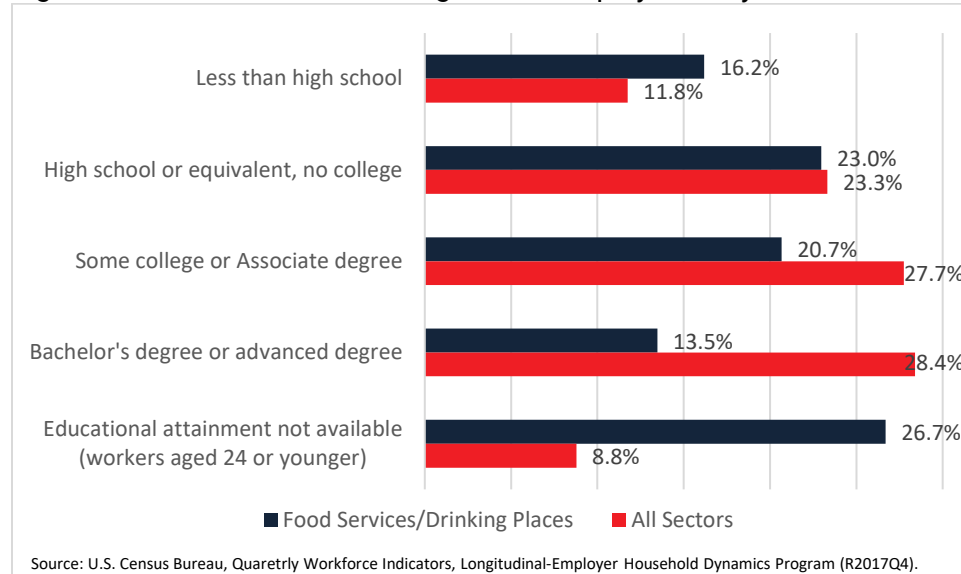


Food services/drinking places

In the food services/drinking places sector, the “Educational attainment not available” category (workers aged 24 or younger) accounts for 26.7% of workers in 2016, compared with 20.7% in the retail sector, and only 8.8% of workers in all sectors in Baltimore City. Compared to all sectors, the educational attainment of workers in the food services/drinking places sector is lower. While the share of workers in food services/drinking places with an educational attainment of high school equivalent or less (39.2%) is similar to the retail sector share (39.3%), it exceeds the share of workers in all sectors for those attainment categories (35.1%). The share of workers in the food services/drinking places sector with an educational attainment of some college or above (34.2%) is lower than for workers in both retail (40.0%) and in all sectors combined (56.1%).

Compared with retail, the food services/drinking places sector had a slightly higher concentration of workers in the less than high school category (16.2% for food services/drinking places and 14.1% for retail) and slightly lower share of workers in the Bachelor's degree or advanced degree category (13.5% for food services/drinking places vs 16.6% for retail).

Figure 22. Food Services/Drinking Places Employment by Educational Attainment, Baltimore City: 2016



In the food services/drinking places sector in Baltimore City, the educational attainment categories with the greatest rates of annual growth (2006-2016) were at the high end of the education range: some college or associate's degree (+2.4%) and bachelor's degree or advanced degree (+3.9%).

A complementary examination of worker educational attainment by sector was performed after recalibrating the analysis to account only for workers for whom educational attainment may be obtained (25 years of age and above). The analysis reveals that the educational attainment of workers in the retail and food services/drinking places sectors is lower than for workers in all sectors combined, even when excluding workers for whom educational attainment is not available.

In 2016, there was a higher concentration of workers 25 years of age and older in the lowest two attainment categories (high school or equivalent, no college and less than high school) in the food services/drinking places sector (53.4%), than in retail (49.6%) and in all sectors combined (38.4%). Furthermore, there was a lower concentration of workers 25 years of age and older with a Bachelor's degree or advanced degree in food services/drinking places (18.4%) than in retail (20.9%) and in all sectors combined (31.1%).

Figure 23. Share of Employment by Educational Attainment and Industry Sector: 2016

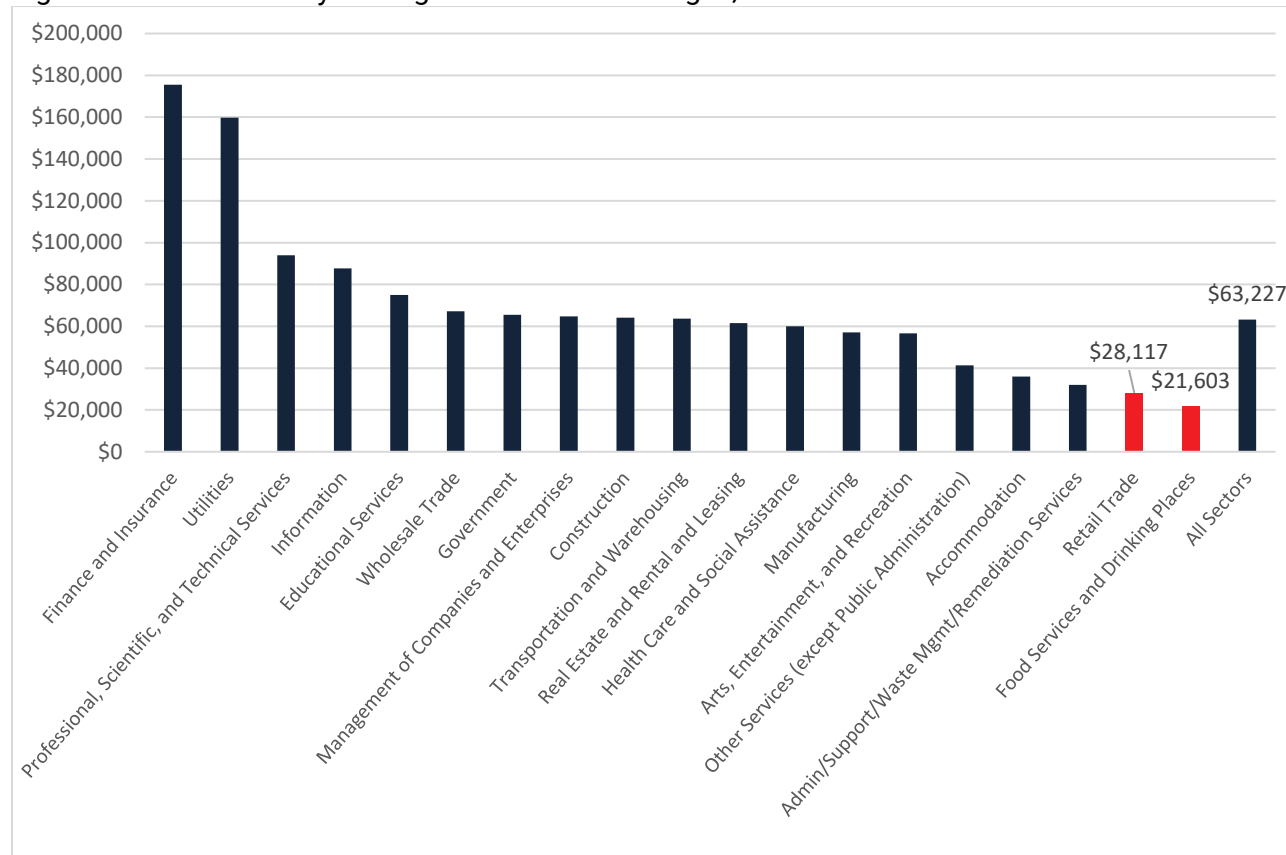
Educational Attainment	Retail	Food Services/ Drinking Places	All Industries
Less than high school	17.7%	22.1%	12.9%
High school or equivalent, no college	31.9%	31.3%	25.6%
Some college or Associate degree	29.6%	28.2%	30.4%
Bachelor's degree or advanced degree	20.9%	18.4%	31.1%
Subtotal	100.0%	100.0%	100.0%

Note: Educational attainment data is available for workers 25 years of age and above. The figures in this table exclude workers below the age of 25.
Source: U.S. Census Bureau, Quarterly Workforce Indicators, Longitudinal-Employer Household Dynamics Program (R2017Q4).

Industries in the Retail Trade and Food Services/Drinking Places Sectors

Average annual wages in the retail trade (\$28,117) and food services/drinking places (\$21,603) sectors are lower than in any other sector in Baltimore City. At \$63,227, the average annual wage across all sectors is more than double that for retail trade and nearly triple that for food services/drinking places. Average annual wages are composed of labor-related personal income. Wage data does not include benefits but does include tips.

Figure 24. Baltimore City Average Annual Sector Wages, 2016



Retail Trade

The retail trade sector in Baltimore City is made up of 27 industries at the 4-digit NAICS level. Grocery stores are the largest retail trade employer in the city, accounting for 28.5% of all retail trade jobs. Other top employers include health and personal care stores, clothing stores, gas stations, and general merchandise stores. Grocery and health and personal care stores account for more than 40% of all retail trade jobs. Grocery stores also account for the largest number of payrolled business locations, with 487 in the city. Grocery stores (24.9%), beer/wine/liquor stores (12.0%), and health/personal care stores (11.7%) collectively account for 48.6% of all retail trade sector payrolled business locations.

Average annual wages in the retail trade sector are \$28,117. Electronic shopping and mail-order houses, direct selling establishments, and automobile dealers have the highest average annual wages with wages of \$68,580, \$66,065, and \$54,690, respectively. Average annual wages in grocery stores, the top employing retail trade industry, are \$24,041.

Employment grew in just eight of the 27 4-digit NAICS industries from 2006 to 2016. Jobs grew most rapidly in the electronic shopping and mail-order houses (12.1%), other motor vehicle dealers (7.4%), and used merchandise stores (5.0%) industries. The fastest growing industries are not among the largest employers. Electronic shopping and mail-order houses accounted for 154 jobs in 2016 while other motor vehicle dealers had just 37 jobs in 2016. However, both grocery stores and gasoline stations experienced positive job growth over this period. Just 9 retail trade industries are projected to grow from 2016 to 2021.

Figure 25. Baltimore City: 4-Digit NAICS Retail Trade Industries Summary, sorted by 2016 Jobs

NAICS	Retail Trade Industry	2016 Jobs	% of Total 2016 Jobs	Annual Growth Rate 2006-2016	Annual Growth Rate 2016-2021	2016 Average Annual Wage	2016 Payrolled Business Locations
4451	Grocery Stores	4,592	28.5%	1.0%	0.2%	\$24,041	487
4461	Health and Personal Care Stores	1,905	11.8%	-1.4%	-0.5%	\$40,614	228
4481	Clothing Stores	1,054	6.6%	-6.1%	-3.6%	\$18,919	122
4471	Gasoline Stations	1,032	6.4%	3.5%	1.8%	\$19,720	149
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	819	5.1%	-6.6%	1.7%	\$17,441	77
4441	Building Material and Supplies Dealers	803	5.0%	-5.0%	-1.4%	\$33,999	51
4453	Beer, Wine, and Liquor Stores	678	4.2%	-0.5%	-0.6%	\$24,641	235
4533	Used Merchandise Stores	634	3.9%	5.0%	2.5%	\$32,761	38
4413	Automotive Parts, Accessories, and Tire Stores	520	3.2%	-1.8%	1.9%	\$27,829	57
4522	Department Stores	504	3.1%	-1.7%	-10.8%	\$16,456	8
4543	Direct Selling Establishments	428	2.7%	-1.4%	-0.9%	\$66,065	18
4431	Electronics and Appliance Stores	408	2.5%	-3.3%	-3.4%	\$38,245	72

4452	Specialty Food Stores	389	2.4%	4.0%	1.2%	\$23,829	67
4421	Furniture Stores	348	2.2%	-1.8%	-1.1%	\$37,652	23
4482	Shoe Stores	317	2.0%	-6.0%	-3.4%	\$15,616	37
4411	Automobile Dealers	284	1.8%	-6.9%	-2.8%	\$54,690	45
4512	Book Stores and News Dealers	239	1.5%	-2.3%	-1.3%	\$19,207	21
4511	Sporting Goods, Hobby, and Musical Instrument Stores	190	1.2%	4.2%	3.2%	\$21,635	32
4532	Office Supplies, Stationery, and Gift Stores	181	1.1%	-7.4%	-6.7%	\$20,874	39
4539	Other Miscellaneous Store Retailers	167	1.0%	-3.0%	-2.9%	\$29,251	53
4541	Electronic Shopping and Mail-Order Houses	154	1.0%	12.1%	8.6%	\$68,580	31
4531	Florists	139	0.9%	0.8%	4.3%	\$15,530	17
4542	Vending Machine Operators	102	0.6%	-11.7%	-18.0%	\$8,289	6
4422	Home Furnishings Stores	88	0.5%	-5.2%	-2.8%	\$17,618	17
4483	Jewelry, Luggage, and Leather Goods Stores	76	0.5%	-6.9%	-10.3%	\$23,816	16
4412	Other Motor Vehicle Dealers	37	0.2%	7.4%	-8.2%	\$39,794	8
4442	Lawn and Garden Equipment and Supplies Stores	5	0.0%	-22.0%	-16.7%	Insufficient Data	2
	Total	16,093	100.0%	-1.8%	-0.5%	\$28,117	1,956

Blue highlight = positive industry growth Red highlight = negative industry growth

Food Services/Drinking Places

The food services/drinking places sector in Baltimore City is composed of 8 industries at the 6-digit NAICS level. Full-service restaurants and limited-service restaurants account for the majority (70.0%) of 2016 jobs in Baltimore City. Food service contractors and drinking places (alcoholic beverages) are also significant sources of sector employment, with each industry accounting for approximately ten percent of 2016 jobs. Similarly, full-service and limited-service restaurants constitute the majority of payrolled business locations at 71.4%. Drinking places (alcoholic beverages) comprise the 3rd largest share of total payrolled business locations at 13.9%.

Average annual wages in the food services/drinking places sector are both lower and less variable than in the retail trade sector. Average annual wages across the entire sector are \$21,603. Food service contractors, caterers, and full-service restaurants have the highest 2016 average annual wages at \$25,836, \$24,625, and \$24,337, respectively.

Employment grew from 2006 to 2016 in most 6-digit NAICS industries in Baltimore City. However, jobs in limited-service restaurants, the second largest source of jobs, decreased at an annual rate of -1.6% from 2006 to 2016. Jobs are projected to grow in nearly every 6-digit NAICS industry from 2016 to 2021. Only cafeterias/grill buffets/buffets and mobile food services are projected to lose jobs over this period. Neither industry is a significant employer in the food services/drinking places sector, with just 69 jobs between them in 2016.

Figure 26. Baltimore City: 6-Digit NAICS Food Services and Drinking Places Industries Summary, sorted by 2016 Jobs

NAICS	Food Services and Drinking Places Industry	2016 Jobs	% of Total 2016 Jobs	Annual Growth Rate 2006-2016	Annual Growth Rate 2016-2021	2016 Average Annual Wage	2016 Payrolled Business Locations
722511	Full-Service Restaurants	7,834	39.4%	2.1%	1.4%	\$24,337	371
722513	Limited-Service Restaurants	6,096	30.6%	-1.6%	0.4%	\$17,342	729
722310	Food Service Contractors	2,367	11.9%	2.5%	1.2%	\$25,836	69
722410	Drinking Places (Alcoholic Beverages)	1,935	9.7%	2.3%	1.8%	\$20,373	214
722515	Snack and Nonalcoholic Beverage Bars	1,059	5.3%	0.3%	0.8%	\$17,510	105
722320	Caterers	546	2.7%	-2.3%	1.3%	\$24,625	33
722514	Cafeterias, Grill Buffets, and Buffets	57	0.3%	3.6%	-2.2%	\$16,802	14
722330	Mobile Food Services	12	0.1%	-0.8%	-0.2%	\$12,209	5
	Total	19,906	100.0%	0.7%	1.1%	\$21,603	1,540

Blue highlight = positive industry growth Red highlight = negative industry growth

Occupations in the Retail Trade and Food Services/Drinking Places Sectors

Retail Trade

The top 25 retail trade occupations account for 87.6% of total sector employment in Baltimore City. The top 3 occupations (cashiers, retail salespersons, and stock clerks and order fillers) account for more than 50% of total retail trade sector employment. These are entry-level positions requiring no formal educational credential, no experience, and short-term on-the-job training. Median hourly earnings are low for these positions, with a high of \$11.43 for stock clerks and order fillers. However, those in the 90th percentile of earners see significantly higher hourly earnings of \$14.18 for cashiers, \$18.57 for retail salespersons, and \$21.43 for stock clerks and order fillers. Just two of the top 25 retail trade sector occupations require a bachelor's degree or higher: general operations managers and pharmacists.

Figure 27. Top 25 Retail Trade Occupations in Baltimore City, sorted by 2016 Employment

SOC	Occupation	2016 Emp	% of Total 2016 Industry Emp	Median Hourly Earnings	90th Percentile Hourly Earnings	% Difference (Median to 90 th)	Typical Entry-Level Education	Work Experience Required	Typical On-The-Job Training
41-2011	Cashiers	4,207	26.1%	\$9.19	\$14.18	54.3%	NoED	None	Short
41-2031	Retail Salespersons	2,813	17.5%	\$10.24	\$18.57	81.3%	NoED	None	Short
43-5081	Stock Clerks and Order Fillers	1,539	9.6%	\$11.43	\$21.43	87.5%	NoED	None	Short
41-1011	First-Line Supervisors of Retail Sales Workers	1,342	8.3%	\$19.25	\$30.34	57.6%	HS	<5	None
29-2052	Pharmacy Technicians	473	2.9%	\$15.59	\$21.98	41.0%	HS	None	Moderate
29-1051	Pharmacists	396	2.5%	\$60.47	\$77.41	28.0%	Phd/Prof	None	None
43-4051	Customer Service Representatives	392	2.4%	\$17.57	\$28.25	60.8%	HS	None	Short
53-3033	Light Truck or Delivery Services Drivers	348	2.2%	\$18.28	\$29.61	62.0%	HS	None	Short
11-1021	General and Operations Managers	318	2.0%	\$58.20	\$110.31	89.5%	BA	>5	None
35-2021	Food Preparation Workers	279	1.7%	\$11.09	\$18.60	67.7%	NoED	None	Short
43-1011	First-Line Supervisors of Office and Administrative Support Workers	257	1.6%	\$29.81	\$44.27	48.5%	HS	<5	None
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	251	1.6%	\$13.81	\$25.64	85.7%	NoED	None	Short
43-9061	Office Clerks, General	154	1.0%	\$15.14	\$24.74	63.4%	HS	None	Short
41-3099	Sales Representatives, Services, All Other	135	0.8%	\$27.79	\$54.98	97.9%	HS	None	Moderate
43-3031	Bookkeeping, Accounting, and Auditing Clerks	127	0.8%	\$21.83	\$31.04	42.2%	SC	None	Moderate
43-5071	Shipping, Receiving, and Traffic Clerks	122	0.8%	\$17.01	\$26.36	54.9%	HS	None	Short
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	121	0.8%	\$10.01	\$12.69	26.8%	NoED	None	Short
49-3023	Automotive Service Technicians and Mechanics	119	0.7%	\$21.45	\$32.73	52.6%	HS+	None	Short
53-7064	Packers and Packagers, Hand	113	0.7%	\$11.19	\$18.45	64.9%	NoED	None	Short

51-3021	Butchers and Meat Cutters	113	0.7%	\$19.19	\$23.08	20.2%	NoED	None	Long
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	106	0.7%	\$19.79	\$29.07	46.9%	HS	None	Short
51-3011	Bakers	102	0.6%	\$12.84	\$19.97	55.6%	NoED	None	Long
41-2022	Parts Salespersons	95	0.6%	\$16.07	\$26.96	67.8%	NoED	None	Moderate
53-3031	Driver/Sales Workers	91	0.6%	\$10.75	\$31.28	191.0%	HS	None	Short
53-3032	Heavy and Tractor-Trailer Truck Drivers	85	0.5%	\$23.11	\$33.87	46.6%	HS+	None	Short

Note: For Typical Entry-level of Education Categories: NoED = No formal educational credential; HS = High school diploma or equivalent; HS+ = Postsecondary nondegree award; SC = Some college, no degree; AA = Associate's degree; BA = Bachelor's degree; Phd/Prof = Doctoral or Professional degree

Figures 28 and 29 depict a potential career ladder for persons working in the retail trade sector as well as demographic characteristics for these occupations. The occupations listed are not an exhaustive list, but include the top occupations by 2016 employment. It is important to note that the demographic characteristics are derived from all persons working in these occupations regardless of sector as sector-specific demographic data were not available. As expected, both wages and typical entry-level education increase as individuals progress from entry-level positions to managerial positions. Entry and semi-skilled occupations require no prior work experience, but generally require some level of on-the-job training. The reverse is true for skilled and managerial positions. The supervisory nature of these positions necessitates prior work experience in the sector.

Turning to demographics, males form the majority of employment for entry-level and managerial positions, while females comprise the majority for semi-skilled and skilled workers. Compared to the split for occupations at all levels, males are overrepresented in entry-level and managerial level positions while females are overrepresented in semi-skilled positions. The gender split for entry-level workers is driven primarily by laborers and freight movers, stock clerks, cashiers, and retail salespersons. The first two skew male while the second two skew female, resulting in a relatively even split. The semi-skilled split is driven by secretaries (96% female), office clerks (84% female), and customer service representatives (71% female), all skewing heavily female. Office and administrative support workers drive the split for skilled workers. This occupation is 68% female. Finally, both managerial occupations skew male – 69% for general and operations managers and 58% for sales managers.

Unsurprisingly, entry-level workers skew younger while skilled and managerial workers skew older. The percentage of workers who are under 25 and 25-34 decreases as you move up the career ladder, while the percentage of workers who are 35-44, 45-54, and 55-64 increases as you move up the career ladder. Black or African American and white workers compose the vast majority of workers at all career levels. However, the percentage of black or African American workers decreases from 46.3% of entry-level workers to 19.9% of managerial workers while the percentage of white workers increases from 37.9% of entry-level workers to 71.0% of managerial workers. Compared to the split for all occupations, African American workers are overrepresented in entry-level positions while white workers are overrepresented in managerial positions. Though there is some variation at the occupational level, black or African American workers comprise consistently lower percentages of the workforce as you move from entry-level to managerial occupations. For example, black workers form the largest percentage of the top two entry-level professions: Laborers and freight movers (53% vs. 36% white) and cashiers (44% vs. 35% white). White workers comprise the majority of the top two semi-skilled, skilled, and managerial professions.

Figure 28. Retail Trade Sector: Jobs, Wages, Education, Work Experience, and Training by Level

Level	Job Titles	Median Hourly Earnings Range	Typical Entry-Level Education	Work Experience Required	Typical On-the-Job Training
Entry	<ul style="list-style-type: none"> • Cashiers • Retail Salespersons • Stock Clerks and Order Fillers • Laborers and Freight, Stock, and Material Movers • Packers and Packagers • Counter and Rental Clerks 	\$9.19 - \$14.70	No formal educational credential	None	Short-term
Semi-skilled	<ul style="list-style-type: none"> • Customer Service Representatives • Office Clerks • Sales Representatives • Shipping, Receiving, and Traffic Clerks • Secretaries and Administrative Assistants • Parts Salespersons 	\$15.14 - \$27.79	HS Diploma or Equivalent	None	Short-term or Moderate-term
Skilled	<ul style="list-style-type: none"> • First-line Supervisors of Retail Sales Workers • First-line Supervisors of Office and Administrative Support Workers 	\$19.25 - \$29.81	HS Diploma or Equivalent	<5 years	None
Managerial	<ul style="list-style-type: none"> • General and Operations Managers • Sales Managers 	\$58.20 - \$65.10	Bachelor's Degree	<5 years to 5 years or more	None

Figure 29. Demographic Characteristics by Level for Top Retail Trade Sector Occupations

	Entry-Level	Semi-skilled	Skilled	Managerial	All Levels
Gender					
Male	53.4%	22.6%	37.7%	68.0%	39.8%
Female	46.6%	77.4%	62.3%	32.0%	60.2%
Age					
Under 25	24.7%	11.2%	4.8%	1.9%	14.4%
25-34	25.2%	22.0%	21.7%	19.2%	22.9%
35-44	16.0%	18.8%	23.0%	26.0%	19.0%
45-54	16.2%	22.2%	26.6%	28.8%	21.2%
55-64	12.7%	18.9%	19.4%	19.5%	16.8%
65+	5.2%	6.8%	4.5%	4.6%	5.7%
Race/ethnicity					
Black or African American	46.3%	35.5%	34.7%	19.9%	37.9%

White	37.9%	54.5%	54.6%	71.0%	50.0%
Asian	7.8%	3.5%	5.1%	4.3%	5.3%
Hispanic or Latino	6.1%	4.8%	4.0%	3.3%	5.0%
Two or More Races	1.6%	1.4%	1.3%	1.3%	1.5%
American Indian or Alaska Native	0.3%	0.2%	0.2%	0.1%	0.2%
Native Hawaiian or Other Pacific Islander	0.1%	0.1%	0.1%	0.0%	0.1%

*Note: The percentages listed are for all persons working in the occupations across all sectors, as sector-specific demographic data were not available

Food Services/Drinking Places

The top 25 food services/drinking places occupations account for 96.6% of total sector employment in Baltimore City. The top 2 occupations (waiters and waitresses and combined food preparation and serving workers, including fast food) alone account for 35.5% of total sector employment. As in the retail trade sector, these are low-paying positions with median hourly earnings of \$10.39 for waiters and waitresses and \$10.01 for combined food preparation and serving workers. Combined food preparation workers in the 90th percentile of earners see slightly higher hourly earnings of \$12.69 while waiters and waitresses in the 90th percentile earn \$17.63 hourly.

Just one of the top 25 food services/drinking places sector occupations requires a bachelor's degree or higher: general operations managers. The list is dominated (19 out of 25) by entry-level occupations that fit the following criteria, only 4 of which have median hourly earnings greater than \$12.00:

- Typical entry-level education: No formal educational credential or High school diploma
- Work Experience Required: None
- Typical on-the-job training: None or short-term

Figure 30. Top 25 Food Services and Drinking Places Occupations in Baltimore City, sorted by 2016 Employment

SOC	Occupation	2016 Emp	% of Total 2016 Industry Emp	Median Hourly Earnings	90th Percentile Hourly Earnings	% Difference (Median to 90th)	Typical Entry-level Education	Work Experience Required	Typical On-The-Job Training
35-3031	Waiters and Waitresses	3,711	18.6%	\$10.39	\$17.63	69.7%	NoED	None	Short
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	3,347	16.8%	\$10.01	\$12.69	26.8%	NoED	None	Short
35-2014	Cooks, Restaurant	1,540	7.7%	\$13.74	\$18.62	35.5%	NoED	<5	Moderate
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	1,399	7.0%	\$18.27	\$29.08	59.2%	HS	<5	None
35-3011	Bartenders	1,331	6.7%	\$10.22	\$17.96	75.8%	NoED	None	Short
35-2021	Food Preparation Workers	1,003	5.0%	\$11.09	\$18.60	67.7%	NoED	None	Short

41-2011	Cashiers	992	5.0%	\$9.19	\$14.18	54.3%	NoED	None	Short
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	856	4.3%	\$10.46	\$15.52	48.5%	NoED	None	Short
35-9021	Dishwashers	716	3.6%	\$10.27	\$14.86	44.7%	NoED	None	Short
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	638	3.2%	\$9.62	\$13.57	41.1%	NoED	None	Short
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	569	2.9%	\$10.74	\$13.83	28.7%	NoED	None	None
35-2011	Cooks, Fast Food	547	2.7%	\$10.85	\$14.69	35.4%	NoED	None	Short
53-3031	Driver/Sales Workers	389	2.0%	\$10.75	\$31.28	191.0%	HS	None	Short
35-2015	Cooks, Short Order	364	1.8%	\$10.94	\$15.85	44.9%	NoED	None	Short
33-9032	Security Guards	239	1.2%	\$11.93	\$24.29	103.5%	HS	None	Short
35-3041	Food Servers, Nonrestaurant	233	1.2%	\$9.94	\$14.47	45.6%	NoED	None	Short
11-1021	General and Operations Managers	229	1.1%	\$58.20	\$110.31	89.5%	BA	>5	None
11-9051	Food Service Managers	222	1.1%	\$31.30	\$50.84	62.4%	HS	<5	None
35-1011	Chefs and Head Cooks	204	1.0%	\$20.89	\$38.20	82.8%	HS	>5	None
35-2012	Cooks, Institution and Cafeteria	150	0.8%	\$15.72	\$22.75	44.7%	NoED	None	Short
53-3033	Light Truck or Delivery Services Drivers	131	0.7%	\$18.28	\$29.61	62.0%	HS	None	Short
35-9099	Food Preparation and Serving Related Workers, All Other	121	0.6%	\$12.21	\$17.32	41.8%	NoED	None	Short
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	112	0.6%	\$11.82	\$18.72	58.4%	NoED	None	Short
51-3011	Bakers	108	0.5%	\$12.84	\$19.97	55.6%	NoED	None	Long
43-9061	Office Clerks, General	77	0.4%	\$15.14	\$24.74	63.4%	HS	None	Short

Note: For Typical Entry-level of Education Categories: NoED = No formal educational credential; HS = High school diploma or equivalent; HS+ = Postsecondary nondegree award; SC = Some college, no degree; AA = Associate's degree; BA = Bachelor's degree; Phd/Prof = Doctoral or Professional degree

Figures 31 and 32 depict a potential career ladder for persons working in the food services/drinking places sector as well as demographic characteristics for these occupations. As with retail trade, the occupations listed are not an exhaustive list, but include the top occupations by 2016 employment. It is important to note that the demographic characteristics are derived from all persons working in these occupations regardless of sector as sector-specific demographic data were not available. As expected, both wages and typical entry-level education increase as individuals progress from entry-level positions to managerial positions. However, wage levels are lower than their counterparts in the retail trade sector. In addition, a greater number of positions in the food services/drinking places sector require no formal educational credential. Entry and semi-skilled occupations require no prior work experience or less than 5 years, but generally require some level of on-the-job training. The reverse is true for skilled and managerial positions. The supervisory nature of these positions necessitates prior work experience in the sector.

Turning to demographics, females form the majority of employment for entry-level and semi-skilled workers, while males comprise the majority of workers in skilled and managerial positions. Each gender is overrepresented in these respective categories as compared to the gender split for

occupations at all levels. Unsurprisingly, entry-level and semi-skilled workers skew younger while skilled and managerial workers skew older. As a whole, these positions skew younger than those in the retail trade sector. Black or African American and white workers compose the vast majority of workers at all career levels. Black or African American workers comprise the largest percentage of entry-level workers at 43.2%. White workers form the largest share of the remaining categories, with larger majorities at the semi-skilled and managerial levels. White workers are significantly overrepresented at the managerial level as they comprise 69.2% of all managerial workers compared to 46.6% of workers in all occupations. Black or African American workers are slightly overrepresented in the entry-level and skilled levels while white workers are slightly overrepresented at the semi-skilled level as compared to the split for all occupations.

Figure 31. Food Services and Drinking Places Sector Career Ladder: Jobs, Wages, Education, Work Experience, and Training

Level	Job Titles	Median Hourly Earnings Range	Typical Entry-Level Education	Work Experience Required	Typical On-the-Job Training
Entry	<ul style="list-style-type: none"> • Combined Food Preparation and Serving Workers, including Fast Food • Cashiers • Dining Room and Cafeteria Attendants and Bartender Helpers • Dishwashers • Counter Attendants • Nonrestaurant Food Servers 	\$9.19 - \$10.46	No formal educational credential	None	Short-term
Semi-skilled	<ul style="list-style-type: none"> • Waiters and Waitresses • Restaurant, Fast Food, Short Order, and Institution/Cafeteria Cooks • Bartenders • Food preparation workers • Hosts and Hostesses 	\$10.22 - \$15.72	No formal educational credential	None to <5 years	Short-term or Moderate-term
Skilled	<ul style="list-style-type: none"> • First-Line Supervisors of Food Preparation and Serving Workers • Chefs and Head Cooks 	\$18.27 - \$20.89	HS Diploma or Equivalent	<5 years to 5 years or more	None
Managerial	<ul style="list-style-type: none"> • General and Operations Managers • Food Service Managers 	\$31.30 - \$58.20	HS Diploma or Equivalent to Bachelor's Degree	<5 years to 5 years or more	None

Figure 32. Food Services and Drinking Places Sector: Demographic Characteristics by Level

	Entry-Level	Semi-skilled	Skilled	Managerial	All Levels
Gender					
Male	39.6%	45.9%	54.4%	68.4%	47.4%
Female	60.4%	54.1%	45.6%	31.6%	52.6%
Age					
Under 25	31.5%	27.0%	14.5%	2.2%	24.2%
25-34	24.2%	32.2%	32.6%	19.4%	26.8%
35-44	14.4%	16.5%	21.3%	25.8%	17.4%
45-54	13.9%	12.8%	18.5%	28.7%	16.1%
55-64	10.7%	7.9%	9.9%	19.4%	11.0%
65+	5.4%	3.7%	3.1%	4.6%	4.5%
Race/ethnicity					
Black or African American	43.2%	32.2%	40.4%	21.1%	35.6%
White	37.5%	48.1%	42.5%	69.2%	46.6%
Asian	10.0%	8.7%	8.1%	4.6%	8.6%
Hispanic or Latino	6.9%	8.4%	6.8%	3.5%	6.9%
Two or More Races	1.9%	2.2%	1.7%	1.4%	1.9%
American Indian or Alaska Native	0.3%	0.3%	0.3%	0.2%	0.3%
Native Hawaiian or Other Pacific Islander	0.1%	0.1%	0.2%	0.1%	0.1%

*Note: The percentages listed are for all persons working in the occupations across all sectors, as sector-specific demographic data were not available

Projected Demand for Occupations in the Retail Trade and Food Services/Drinking Places Sectors, 2016 to 2021

Total demand is comprised of the sum of new jobs and hiring from separations. New jobs are calculated as net jobs added or lost from 2016 to 2021. Separation rates represent the percentage of people working in an occupation that leave that occupation each year, either by transferring to another occupation or by leaving the labor force. Rates are estimated by the Bureau of Labor Statistics and represent an annual average from 2016 through 2026. The separation rates listed are national averages as regionally specific data is not available.

The national average annual separation rate across all occupations is 10.9%. In the retail trade sector, annual separation rates exceed the national average for 14 of the top 25 occupations. Rates for the top two occupations are significantly higher than the national average: cashiers (18.6%) and retail salespersons (14.3%). Annual separation rates for the top food services/drinking places occupations are higher than those for retail trade, with rates that exceed the national average for 21 of the top 25 occupations. Rates for the top two occupations are significantly higher than the national average: Waiters and waitresses (18.7%) and combined food preparation and serving workers, including fast food (18.1%).

Hiring from separations comprises the vast majority of total demand in both sectors. In the retail trade sector, total demand from 2016 to 2021 is projected to be 10,116 jobs. Hiring from separations accounts for all future hiring demand as employment in the sector is projected to decrease from 2016 to 2021. New job growth from 2016 to 2021 is projected to be negative for 18 of the top 25 jobs in the retail trade sector. In the food services/drinking places sector, total demand from 2016 to 2021 is projected to be 17,630 jobs. Of these, new jobs account for 6.2% (1,091 jobs) while hiring from separations accounts for the remaining 93.8% (16,539 jobs).

Figure 33. New Jobs, Separations, and Total Demand for Top 25 (2016 Employment) Retail Trade Occupations in Baltimore City, 2016 to 2021

SOC	Occupation	2016 Emp	2021 Emp	New Jobs	% Change (Jobs 2016-2021)	Annual Separation %	Hiring from Separations	Total Demand
41-2011	Cashiers	4,207	4,147	-60	-1.4%	18.6%	3,866	3,806
41-2031	Retail Salespersons	2,813	2,644	-169	-6.0%	14.3%	1,962	1,794
43-5081	Stock Clerks and Order Fillers	1,539	1,512	-27	-1.7%	12.6%	957	930
41-1011	First-Line Supervisors of Retail Sales Workers	1,342	1,291	-51	-3.8%	10.4%	686	635
29-2052	Pharmacy Technicians	473	468	-4	-0.9%	7.7%	182	178
29-1051	Pharmacists	396	374	-21	-5.4%	4.2%	82	60
43-4051	Customer Service Representatives	392	390	-3	-0.6%	12.6%	246	243
53-3033	Light Truck or Delivery Services Drivers	348	349	1	0.4%	10.5%	183	184
11-1021	General and Operations Managers	318	309	-9	-2.8%	8.0%	126	117
35-2021	Food Preparation Workers	279	290	10	3.7%	16.7%	235	245
43-1011	First-Line Supervisors of Office and Administrative Support Workers	257	256	-1	-0.5%	9.7%	124	123
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	251	244	-7	-2.9%	13.5%	167	160

43-9061	Office Clerks, General	154	146	-9	-5.7%	11.6%	87	78
41-3099	Sales Representatives, Services, All Other	135	118	-17	-12.8%	11.8%	75	57
43-3031	Bookkeeping, Accounting, and Auditing Clerks	127	116	-11	-8.7%	11.0%	67	56
43-5071	Shipping, Receiving, and Traffic Clerks	122	120	-3	-2.2%	9.9%	60	57
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	121	130	10	7.9%	18.1%	111	121
49-3023	Automotive Service Technicians and Mechanics	119	118	-1	-0.7%	9.2%	54	53
53-7064	Packers and Packagers, Hand	113	114	1	0.7%	14.9%	84	84
51-3021	Butchers and Meat Cutters	113	117	4	3.9%	12.1%	69	73
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	106	100	-6	-5.9%	10.6%	55	48
51-3011	Bakers	102	105	3	3.3%	13.9%	71	74
41-2022	Parts Salespersons	95	102	7	7.0%	12.3%	60	67
53-3031	Driver/Sales Workers	91	80	-11	-12.0%	10.5%	45	34
53-3032	Heavy and Tractor-Trailer Truck Drivers	85	83	-3	-3.0%	10.5%	44	42

Figure 34. Total Demand (2016-2021) for the Top 10 Retail Trade Occupations

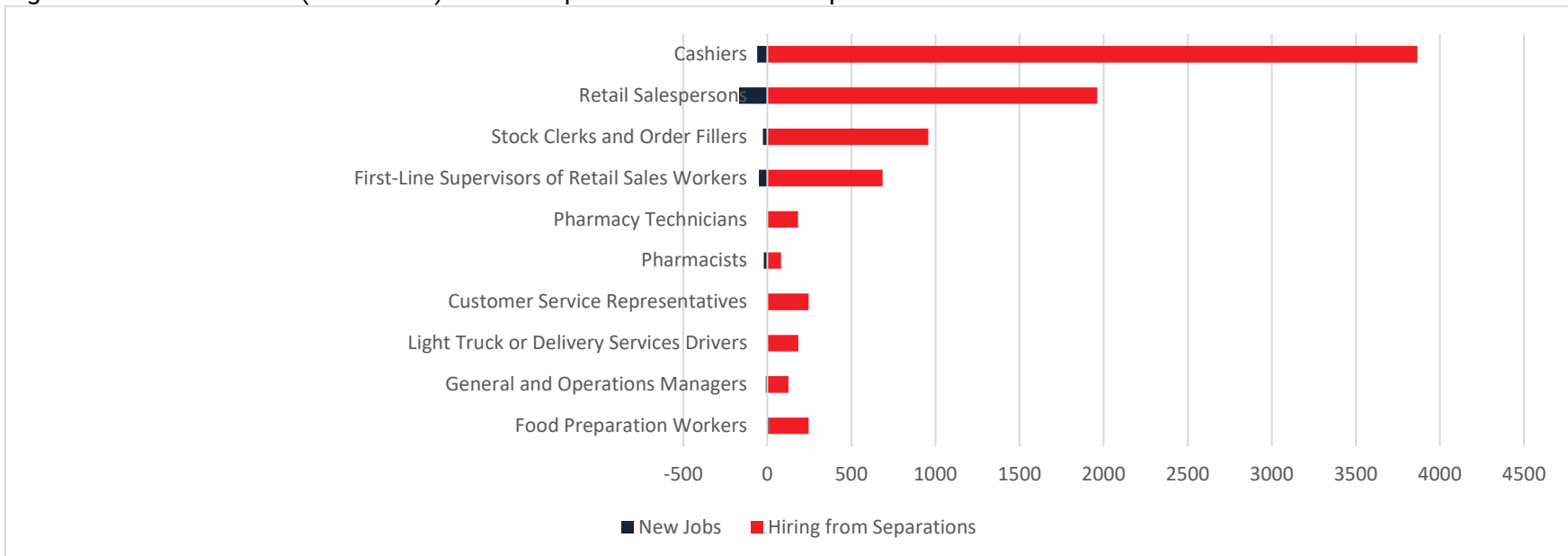


Figure 35. New Jobs, Separations, and Total Demand for Top 25 (2016 Employment) Food Services/Drinking Places Occupations in Baltimore City, 2016 to 2021

SOC	Occupation	2016 Emp	2021 Emp	New Jobs	% Change (Jobs 2016-2021)	Annual Separation %	Hiring from Separations	Total Demand
35-3031	Waiters and Waitresses	3,711	3,926	215	5.8%	18.7%	3,540	3,755
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	3,347	3,555	208	6.2%	18.1%	3,107	3,315
35-2014	Cooks, Restaurant	1,540	1,722	182	11.8%	13.9%	1,119	1,301
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	1,399	1,476	77	5.5%	14.0%	1,001	1,078
35-3011	Bartenders	1,331	1,476	144	10.9%	16.3%	1,128	1,272
35-2021	Food Preparation Workers	1,003	1,051	48	4.7%	16.7%	853	901
41-2011	Cashiers	992	996	4	0.4%	18.6%	924	928
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	856	901	45	5.2%	16.8%	733	778
35-9021	Dishwashers	716	724	8	1.2%	15.4%	552	560
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	638	651	14	2.2%	21.5%	691	705
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	569	610	40	7.1%	22.5%	657	697
35-2011	Cooks, Fast Food	547	512	-35	-6.4%	13.9%	370	335
53-3031	Driver/Sales Workers	389	400	11	2.8%	10.5%	207	218
35-2015	Cooks, Short Order	364	365	1	0.2%	13.9%	252	253
33-9032	Security Guards	239	255	16	6.7%	13.0%	159	175
35-3041	Food Servers, Nonrestaurant	233	241	8	3.6%	14.6%	172	180
11-1021	General and Operations Managers	229	239	11	4.8%	8.0%	93	104
11-9051	Food Service Managers	222	235	13	5.7%	10.5%	119	132
35-1011	Chefs and Head Cooks	204	222	17	8.5%	12.3%	130	147
35-2012	Cooks, Institution and Cafeteria	150	175	25	17.0%	13.9%	111	136
53-3033	Light Truck or Delivery Services Drivers	131	135	4	2.9%	10.5%	70	74
35-9099	Food Preparation and Serving Related Workers, All Other	121	124	4	3.1%	16.8%	103	106
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	112	119	6	5.8%	12.8%	73	80
51-3011	Bakers	108	112	3	3.1%	13.9%	76	79
43-9061	Office Clerks, General	77	79	2	3.2%	11.6%	45	47

Figure 36. Total Demand (2016-2021) for the Top 10 Food Services/Drinking Places Occupations



Job Postings Summary

Job postings provide insight into real-time employer hiring activity, by both company and occupation. To obtain this data, EMSI utilizes a web-scraping tool to gather information on job postings from a variety of online sources. EMSI then matches each job posting to a specific occupation by SOC code. While job postings data provides insight into hiring patterns, it cannot be used as a predictor of employer demand for multiple reasons. First and foremost, a job posting does not necessarily equal a job opening. Some employers may make hundreds or even thousands of postings for just one position, while others may post just one position permanently and hire continuously from that posting. While EMSI's algorithm attempts to account for duplicate postings, it does so imperfectly. Furthermore, many job postings do not contain enough information to reliably match them to specific occupations. Finally, not all jobs are posted online. This data does not include those postings.

Baltimore City accounted for 24% of unique retail trade sector job postings in the Baltimore region from December 2016 through December 2017, or 21,128 out of 89,602 postings. In the food services/drinking places sector, Baltimore City accounted for 21% of unique job postings, or 8,675 out of 42,132 postings. While employment in the food services/drinking places sector exceeds that of retail trade in Baltimore City, there were less than half as many unique job postings.

Unsurprisingly, retail trade and food services/drinking places occupations with higher employment levels tend to be posted most frequently. However, first-line supervisors of retail sales workers had the most unique job postings from December 2016 to December 2017 in the retail trade sector despite the fact that cashiers, retail salespersons, and stock clerks had higher 2016 employment levels. Similarly, first-line supervisors of food preparation workers and food service managers had the most unique job postings in the food services/drinking places sector despite the fact that waiters and waitresses, combined food preparation workers, and cooks all had higher 2016 employment levels. This indicates that employers may focus their job postings on supervisory or managerial occupations that may be more difficult to fill as opposed to occupations requiring lower levels of education and work experience that tend to have high separation rates.

Figure 37. Retail Trade: Unique Job Postings in the Baltimore Region, Dec 2016 – Dec 2017

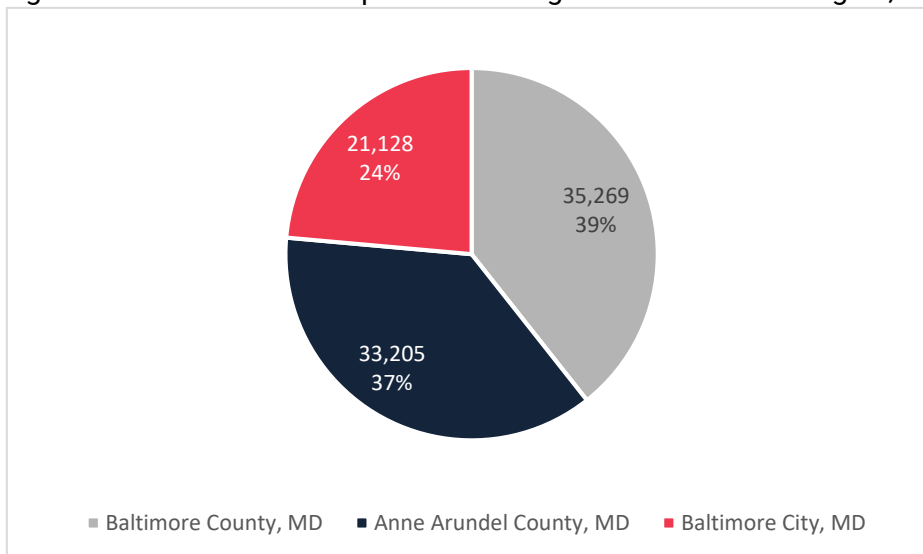


Figure 38. Retail Trade: Top 10 companies posting jobs in Baltimore City, unique postings Dec 2016 – Dec 2017

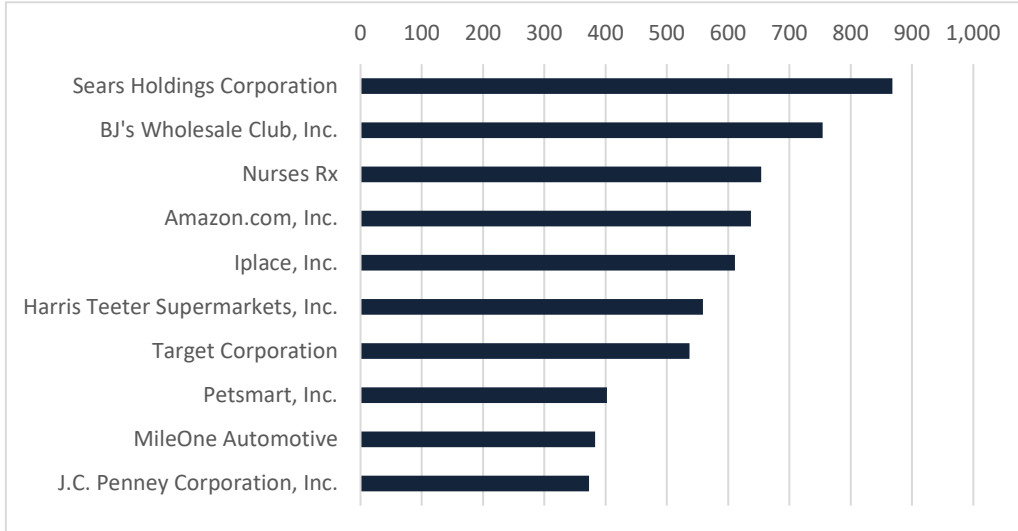


Figure 39. Retail Trade: Top 10 occupations with job postings in Baltimore City, unique postings Dec 2016 – Dec 2017

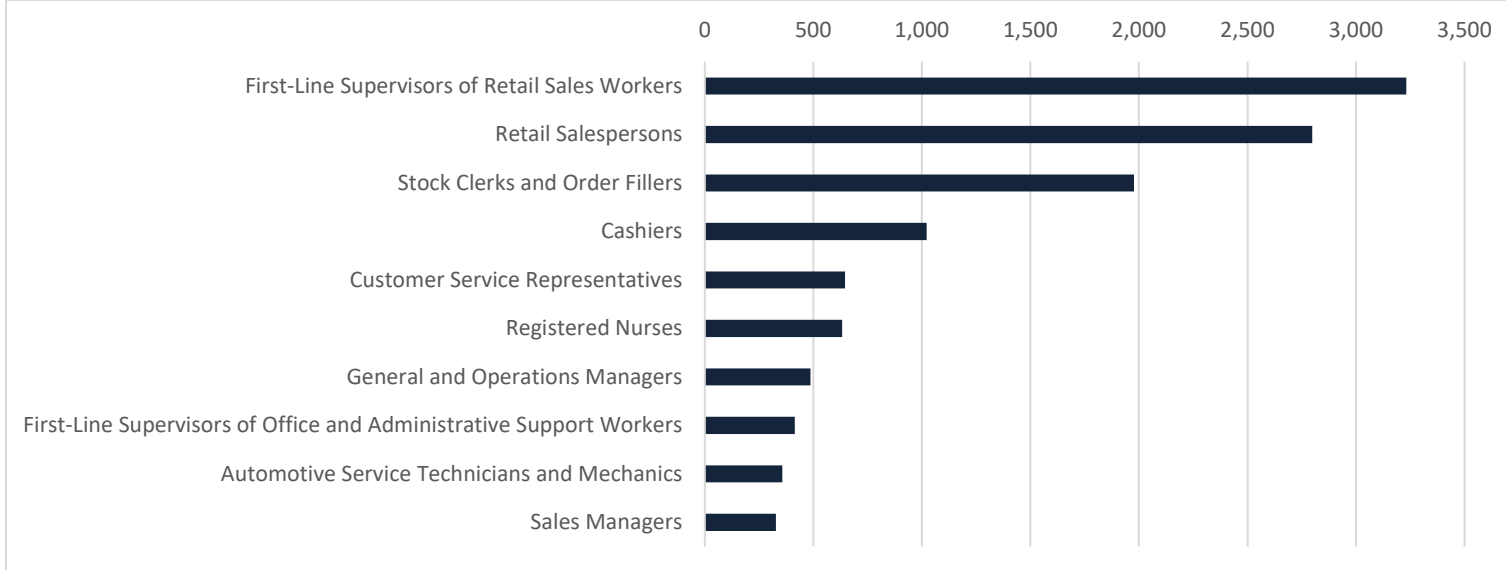


Figure 40. Food Services and Drinking Places: Unique Job Postings in the Baltimore Region, Dec 2016 – Dec 2017

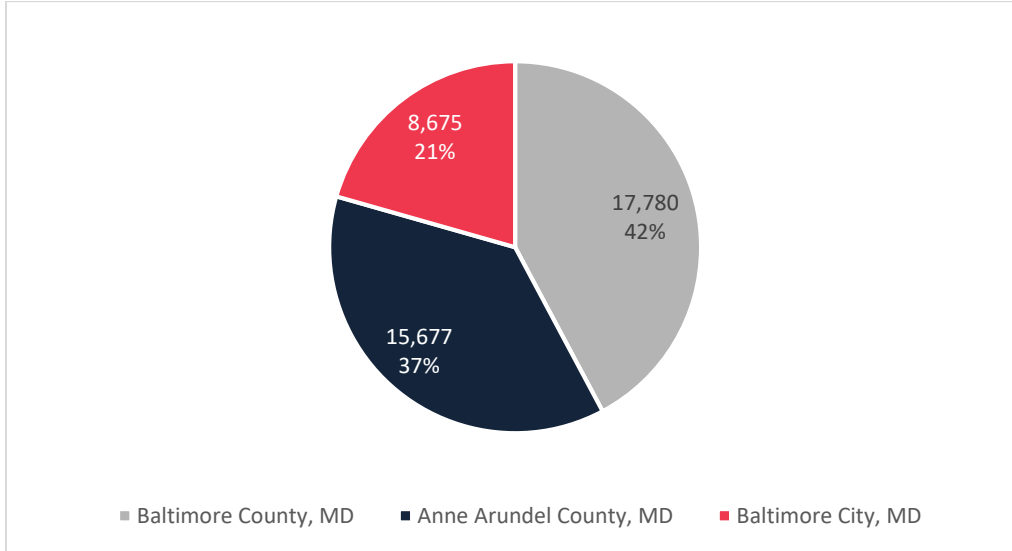


Figure 41. Food Services and Drinking Places: Top 10 companies posting jobs in Baltimore City, unique postings Dec 2016 – Dec 2017

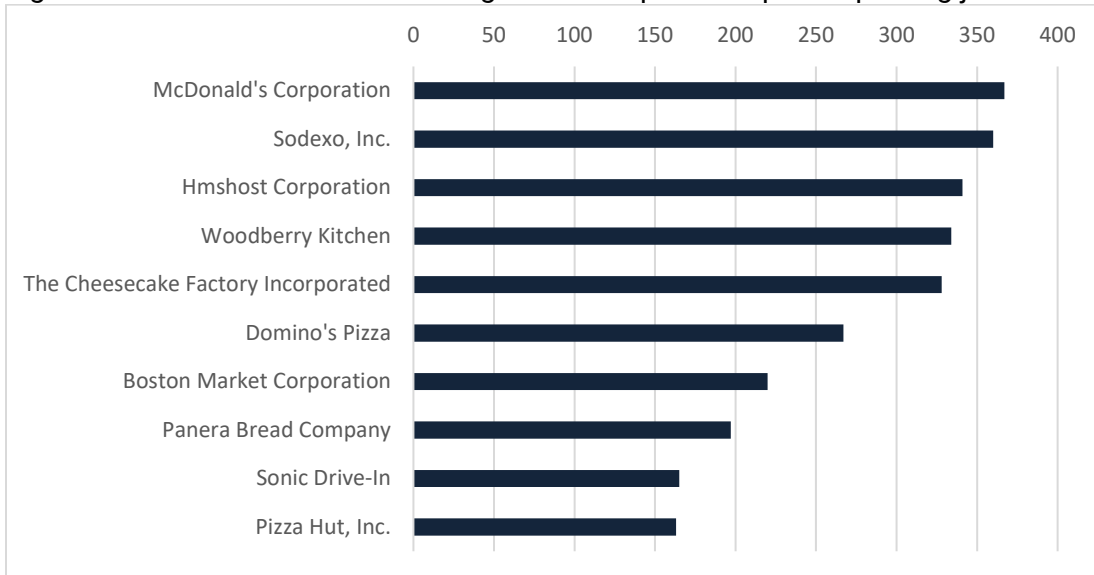
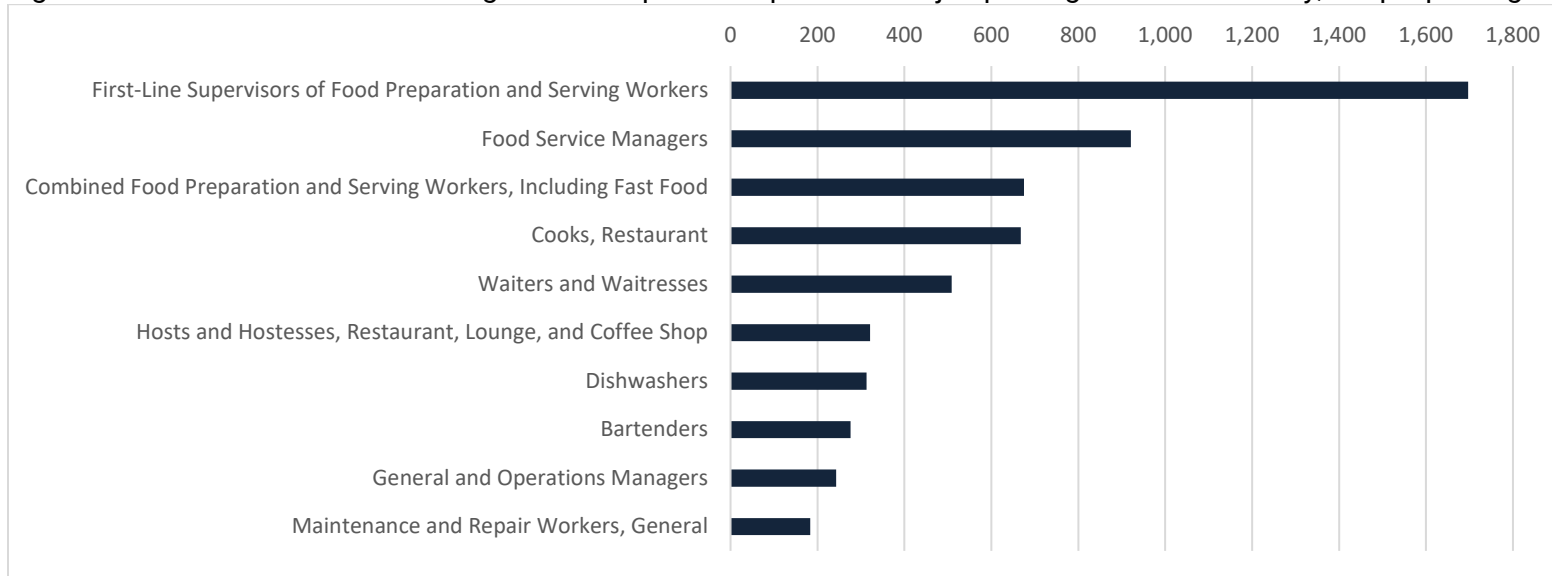


Figure 42. Food Services and Drinking Places: Top 10 occupations with job postings in Baltimore City, unique postings Dec 2016 – Dec 2017



NOTES:

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