

SAN DIEGO COUNTY LABOR MARKET ANALYSIS

# RETAIL INDUSTRY

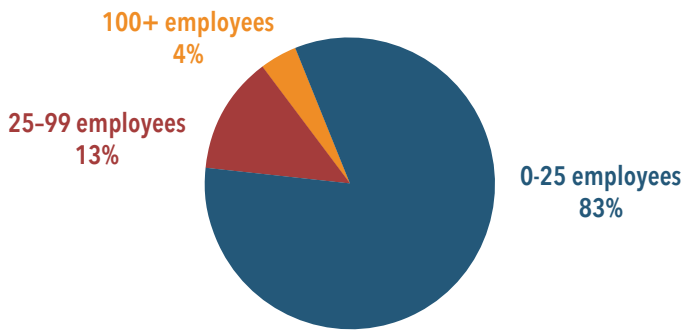
NOVEMBER 2016



The retail industry sector employs approximately 286,100 workers, making up 19.2% of all jobs in San Diego County. In addition to its considerable impact on local jobs, sales tax revenue and quality of life in San Diego County, retail also plays a critical role in developing essential skills in the region's workforce and introducing young people to the world of work. For the purpose of this report, retail is defined as an industry sector comprised of companies that sell goods directly to consumers (i.e., business to consumer or B2C). Due to the industry sector's economic and workforce importance in the region, this study analyzes the retail labor market and its opportunities for career advancement.

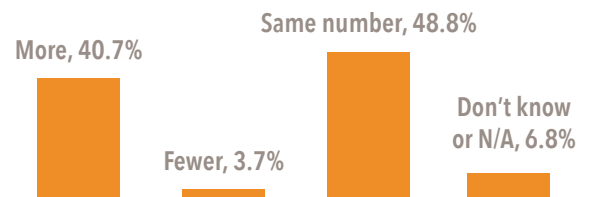
More than 80% of retail firms in San Diego County are small businesses, employing fewer than 25 workers at their locations.

San Diego Retail Businesses by Employment Size



Overall, retail employers projected to grow approximately 6.7% in employment over the next 12 months. This is more than double the actual average annual growth rate of 3.3% between 2011 and 2016. Of the 324 employers surveyed for this study, 40.7% expect to have more employees at their Southern California locations in the next 12 months.

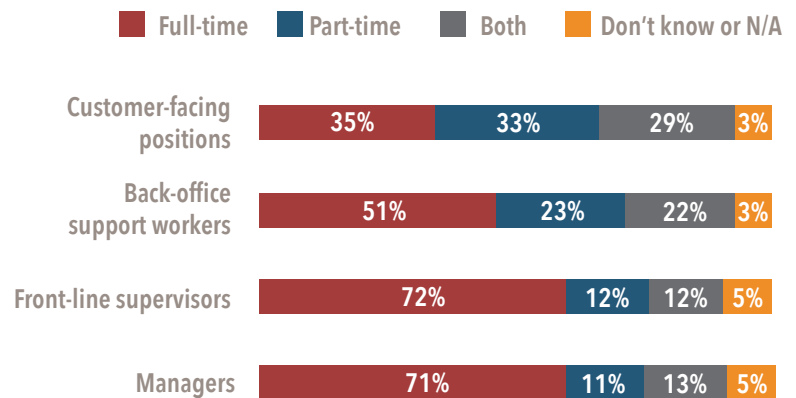
Retail Firms Expectations of Employment Growth in the Next 12 Months



To better understand the workforce expectations of retail employers, this labor market analysis categorizes retail occupations into four general clusters:

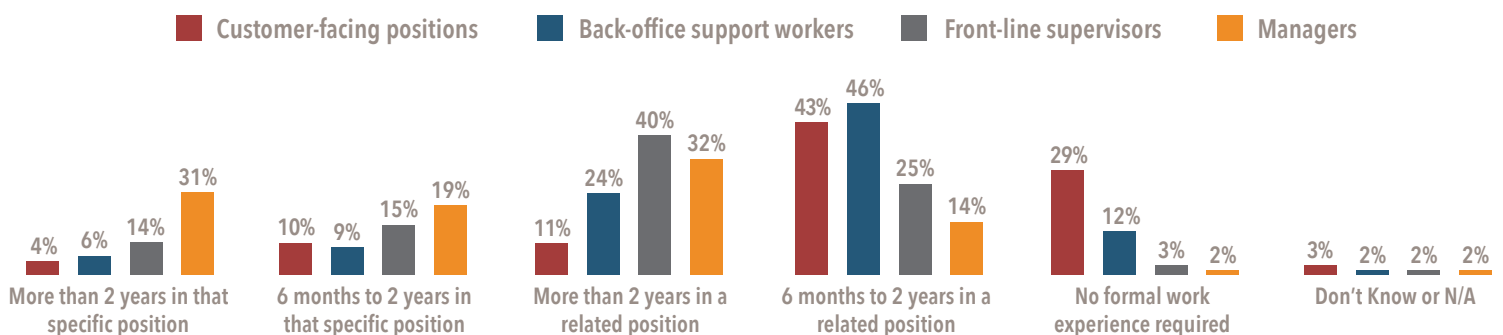
- Customer-facing positions** (e.g., retail salespersons, cashiers, customer service representatives)
- Back-office support workers** (e.g., stock clerks and order fillers, packers and packagers, office clerks)
- Front-line supervisors** (e.g., front-line supervisors of retail salespersons)
- Managers** (e.g., general and operations managers, sales managers)

Part-time vs. Full-time Employment



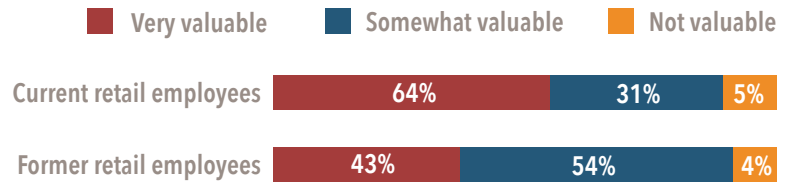
Depending on the position type, employers reported having different expectations of workers within the occupational clusters.

Typical Experience Expectations of Retail Employers by Occupational Cluster

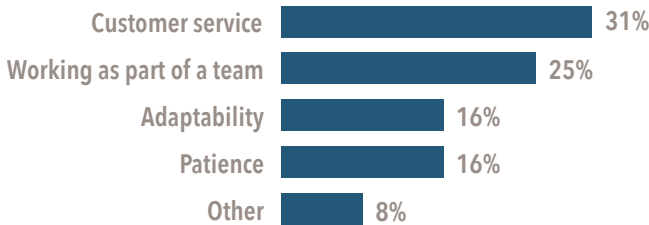


In analyzing the opportunities for career advancement, 67 former and current retail employees were surveyed for this study. Current employees were more likely to rate retail industry work experience as “very valuable” compared to former employees (64% vs. 43%).

### Value of Retail Industry Work Experience



The top five skills that current and former employees reported learning from retail that contributed the most to helping them succeed in their career include:

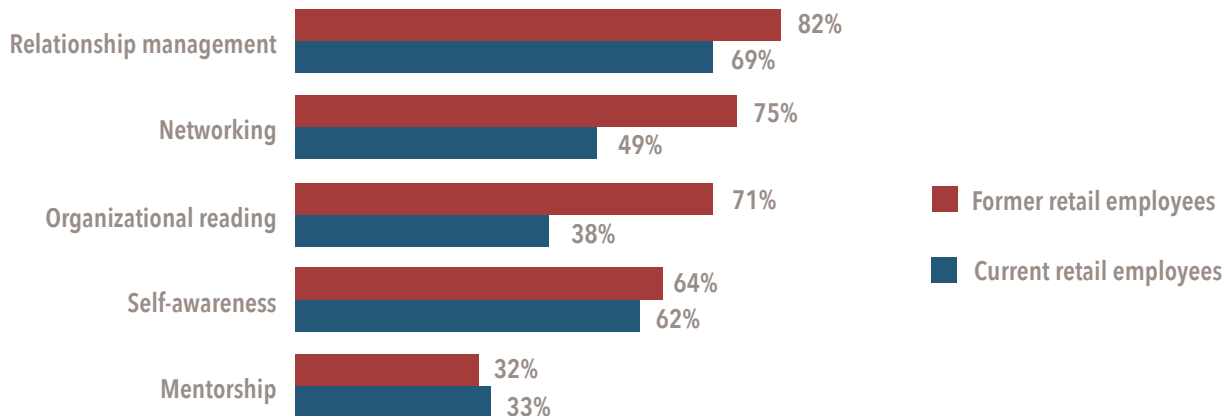


The top five factors that current and former retail employees reported to have the most importance in their successful career navigation (or ability to successfully advance to new jobs with increased pay and responsibilities) include:



When asked to rate the importance of the following activities for their career advancement, both current and former retail employees overwhelmingly indicated relationship management as the most important activity in advancing their careers.

### Importance of Activities Related to Career Advancement by Current and Former San Diego Retail Employees



## RECOMMENDATIONS

- Workforce development programs that support retail career advancement should focus on relationship management (maintaining personal connections, taking notes on contacts, demonstrating value in professional conversations, and being a good listener), customer services skills development, and emphasis on work ethics
- Employers who want to retain current workers and promote from within would benefit from developing internal training programs that provide relevant work experience and allow existing workers to advance to higher positions
- Current and prospective retail workers would benefit from improving their self-awareness (taking formal assessments, evaluating their own career pathway, and determining own strengths and desires), which is reported to be the second most important activity in advancing their careers, yet 59% of current workers spend fewer than 4 hours on this activity.

## Table of Contents

<b>INTRODUCTION</b> .....	<b>2</b>
Industry Definition .....	2
Occupational Definition .....	3
<b>INDUSTRY OVERVIEW</b> .....	<b>4</b>
<b>OCCUPATIONAL OVERVIEW</b> .....	<b>6</b>
Customer-facing Positions .....	11
Back-office Support .....	14
Front-line Supervisors .....	16
General and Operations Managers.....	17
<b>RETAIL EMPLOYMENT SUPPLY</b> .....	<b>20</b>
<b>EMPLOYEE ETHNOGRAPHY</b> .....	<b>21</b>
<b>KEY FINDINGS AND RECOMMENDATIONS</b> .....	<b>27</b>
<b>APPENDIX A – METHODOLOGY</b> .....	<b>1</b>
<b>APPENDIX B – EMPLOYER TOPLINES</b> .....	<b>1</b>
<b>APPENDIX C – EMPLOYEE ETHNOGRAPHY TOPLINES</b> .....	<b>1</b>
<b>APPENDIX D – RETAIL OCCUPATIONS</b> .....	<b>12</b>

## INTRODUCTION

The retail industry sector is a valuable economic driver for San Diego County. In addition to its considerable impact on local jobs, sales tax revenue and quality of life in San Diego County, it also plays a critical role in developing essential skills in the region's workforce and introducing young people to the world of work.

For the purpose of this report, retail is defined as an industry comprised of companies that have a storefront, sell goods directly to consumers (i.e., business to consumer or B2C), or conduct e-Commerce.<sup>1</sup> Retail employs approximately 286,100 workers, which make up about 19 percent of all jobs in San Diego County.<sup>2</sup> Retail employers are spread across the entire county, sell a wide range of goods and services, and come in varying sizes. The North San Diego Business Chamber and other economic development entities stress the importance of maintaining retail companies and purchasing from local vendors in the initiative, Think Local First San Diego. According to the North San Diego Business Chamber, for every \$100 spent at a locally-owned business, \$45 to \$68 goes back into the local community and tax base.<sup>3</sup>

Given the importance of this industry sector to the county's economy and workforce, the San Diego Workforce Partnership commissioned BW Research Partnership, Inc. to conduct this study and identify barriers to employment and opportunities for career pathways within retail. This study also provides recommendations for developing and expanding training and employment programs to support career advancement in retail.

This study is the product of a four-step research process, which includes:

- Comprehensive analysis of secondary data sources, including the U.S. Bureau of Labor Statistics (BLS), California Employment Development Department (EDD), U.S. Census Bureau, O\*NET, and Chmura Economics JobsEQ platform;
- Phone and web surveys of 324 retail employers;
- In-depth executive interviews with employers to determine existing career pathways within retail; and
- A web survey of current and former retail employees

For more information on the methodology, view Appendix A – Methodology.

## Industry Definition

As previously mentioned, retail is broadly defined by B2C companies, including restaurants or places of business that sell food or beverages directly to consumers.<sup>4</sup> Retail establishments and previous and current retail employees from the following North American Industry Classification System (NAICS)<sup>5</sup> categories were contacted:

---

<sup>1</sup> See Industry Definition on page 2.

<sup>2</sup> Chmura Economics JobsEQ Q2 2016

<sup>3</sup> thinklocalfirstsd.com

<sup>4</sup> Informed by the National Retail Federation (NRF) retail definition

<sup>5</sup> The North American Industry Classification System is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. Source: United States Census Bureau.



- Breweries and Wineries – NAICS 312
- Motor Vehicle and Parts Dealers – NAICS 441
- Furniture and Home Furnishings Stores – NAICS 442
- Electronics and Appliance Stores – NAICS 443
- Building Material and Garden Equipment and Supplies Dealers – NAICS 444
- Food and Beverage Stores – NAICS 445
- Health and Personal Care Stores – NAICS 446
- Gasoline Stations – NAICS 447
- Clothing and Clothing Accessories Stores – NAICS 448
- Sporting Goods, Hobby, Musical Instrument, and Book Stores – NAICS 451
- General Merchandise Stores – NAICS 452
- Miscellaneous Store Retailers – NAICS 453
- Non-store Retailers – NAICS 454
- Restaurants – NAICS 722

## Occupational Definition

This study analyzes occupations that have at least 100 annual openings (new and replacement jobs) over the next five years in San Diego County. They are categorized as “front of house” which includes the customer-facing positions; back-office support; front-line supervisors; and general and operational managers:

**Customer-facing positions** (e.g., retail salespersons, cashiers, customer service representatives) account for just over half of all retail occupations. These employees typically have a high school diploma, with the exception of sales representatives.

**Back-office support workers** (e.g., stock clerks and order fillers, packers and packagers, office clerks) comprise two in 10 retail workers. These employees average approximately \$37,000 a year and have a high school diploma or less.

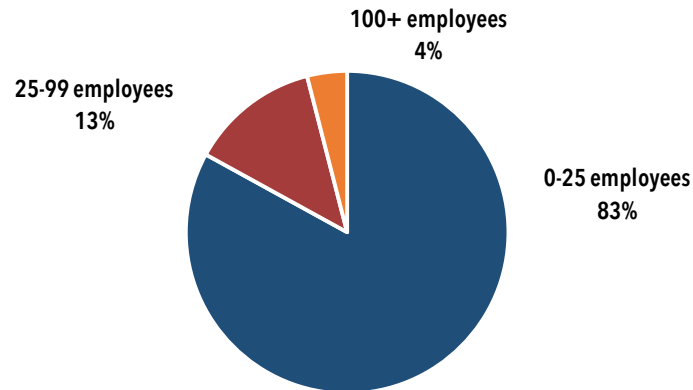
**Front-line supervisors** (e.g., front-line supervisors of retail sales workers, front-line supervisors of office and administrative support workers) account for less than eight percent of all retail workers. These employees typically have a high school education, with the exception of those who manage office and administrative support workers. The average wage for supervisors is just under \$53,000 a year.

**General and operations managers** (e.g., general and operations managers and sales managers) are the highest paid retail workers. These workers typically possess a bachelor’s degree and earn more than \$120,000 a year on average.

## INDUSTRY OVERVIEW

The retail industry employs 19.2 percent or 286,100 of all workers<sup>6</sup> in San Diego County, encompassing approximately 14,880 total establishments.<sup>7</sup> Comparatively, California's retail industry employs 17.7 percent of all workers statewide. Approximately 83 percent of retail establishments in the county employ less than 25 workers, with 13 percent of establishments employing between 25 and 99 workers, and four percent with 100 employees or more (Figure 1).<sup>8</sup>

Figure 1: San Diego Retail Businesses by Employment Size



Just over 40,400 retail employees are located in the downtown San Diego, zip code 92101. This zip code encompasses Little Italy, Gaslamp Quarter and the Marina, and extends Northwest to the San Diego International Airport. Six separate zip codes in the county are home to more than 10,000 employees in the retail industry (Figure 2).<sup>9</sup> They include:

- 92101 – Downtown, City of San Diego: 40,400 employees
- 92108 – Mission Valley, City of San Diego: 21,700 employees
- 92008 – Northwest Carlsbad including Carlsbad Village: 16,500 employees
- 92110 – The Midway District and Morena, City of San Diego: 15,200 employees
- 92037 – La Jolla and Torrey Pines: 14,000 employees
- 92109 – Pacific Beach and Mission Beach, City of San Diego: 10,100 employees
- All other zip codes – Remaining areas of San Diego County: 168,200 employees

Figure 2: San Diego County Retail Employment Concentration<sup>10</sup>

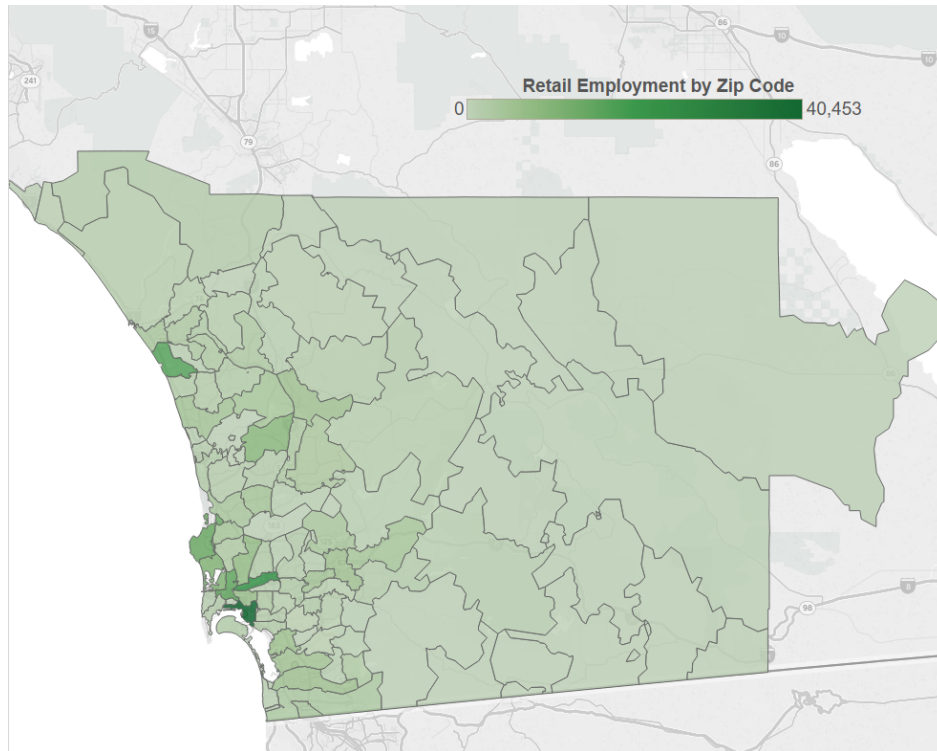
<sup>6</sup> Chmura Economics JobsEQ Q2 2016

<sup>7</sup> Quarterly Census of Employment and Wages (QCEW) Q1 2016

<sup>8</sup> InfoUSA SalesGenie

<sup>9</sup> Chmura Economics JobsEQ Q2 2016, 1,492,254 total workers in San Diego County

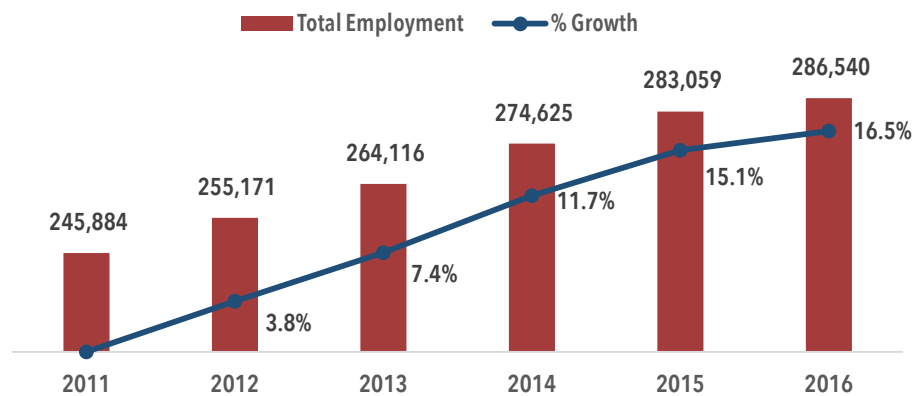
<sup>10</sup> Chmura Economics JobsEQ Q2 2016



### Retail Growth

In San Diego County, the retail industry expanded by nearly 40,500 jobs between 2011 and 2016, an increase of 16.5 percent (Figure 3). Retail jobs represented more than a quarter (26 percent) of all job growth countywide, compared to overall job growth in other industries was 11.5 percent.<sup>11</sup>

Figure 3. Retail Industry Employment Growth, 2011-2016<sup>12</sup>



Looking forward, retail employers projected approximately 6.7 percent overall employment growth over the next 12 months. This is optimistic given the average annual retail growth rate of about three percent between 2011 and 2016. Of the employers surveyed, 41.6 percent expected to have more

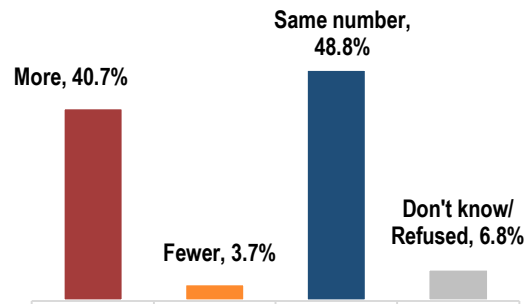
<sup>11</sup> Chmura Economics JobsEQ Q2 2016

<sup>12</sup> Chmura Economics JobsEQ Q2 2011 - Q2 2016



employment at their Southern California locations in 12 months, only 3.7 percent predicted fewer employees, and 48.8 percent indicated that employment would remain at the current level (Figure 4).

Figure 4: Employer Growth Expectations Over Next 12 Months<sup>13</sup>



## OCCUPATIONAL OVERVIEW

For the purpose of this study, retail occupations with similar characteristics were grouped into four occupational clusters: customer-facing positions, back-office support, front-line management, and general and operations managers.<sup>14</sup>

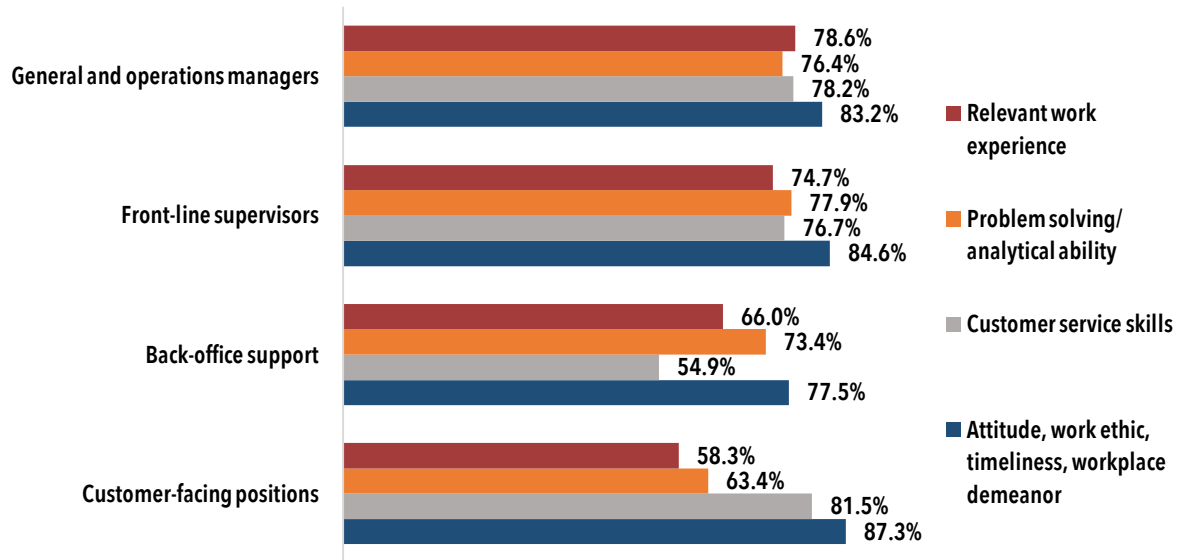
- **Customer-facing positions** (153,800 workers) – retail salespersons, cashiers, customer service representatives, combined food preparation and serving workers (including fast food), waiters and waitresses, bartenders, hosts and hostesses, parts salespersons, counter and rental clerks, sales representatives (services), sales representatives (wholesale and manufacturing, except technical and scientific products), and counter attendants (cafeteria, food concession and coffee shop).
- **Back-office support** (61,700 workers) – stock clerks and order fillers, laborers and freight, stock, and material movers (hand), automotive service technicians and mechanics, pharmacy technicians, cooks (fast food and restaurant) packers and packagers (hand), office clerks (general), food preparation workers, pharmacists, shipping, receiving, and traffic clerks, butchers and meat cutters, and tire repairers and changers.
- **Front-line supervisors** (21,300 workers) – front-line supervisors of retail sales workers, front-line supervisors of office and administrative support workers, front-line supervisors of mechanics, installers and repairers, front-line supervisors of food preparation and serving workers, front-line supervisors of production and operating workers, and front-line supervisors of helpers, laborers, and material movers (hand).
- **General and operations managers** (3,900 workers) – general and operations managers and sales managers.

Across all four occupational groups, retail employers place a high-level of importance on attitude, work ethic, timeliness and workplace demeanor. These attributes were consistently ranked the most important across all occupational groups for retail employees when considering applicants for relevant positions (Figure 5).

<sup>13</sup> n = 324

<sup>14</sup> Approximately 88 percent of all retail employment is classified by these four classification groups. Source: Chmura Economics JobsEQ Q2 2016 – See Appendix D for the Standard Occupational Classification (SOC) table.

Figure 5: Top Four Qualities Deemed “Very Important” by Employers When Considering Applicants by Occupational Cluster



Executive interviews with three retail employers (representing 63 locations in the county) reinforced this importance and also highlighted the deficiency of these basic skills within the current pool of applicants and new hires.

*“I notice a general lack of effort from the workforce.... many applicants come to us after working previously in other industries such as health care or manufacturing, the pay structure does not offer an incentive to work harder.” – Store Director, San Diego County Grocery Chain*

*“We need employees that show up to work on time, know their schedule, basic work skills.” – Human Resources Manager, San Diego County Hotel Restaurant*

Recruiting employees with sufficient problem solving and/or analytical ability is an issue for retail employers in San Diego County. While the importance of this attribute was ranked the highest for back-office support positions and front-line supervisors, overall difficulty in finding applicants with relevant work experience was ranked the highest for front-line supervisors and general and operations managers. Figure 6 demonstrates how employers rank each quality by occupational cluster. The quality with the greatest percentage of employers reporting “very difficult” or “somewhat difficult” to find in applicants is listed as “Rank 1” for that particular occupational cluster. Alternatively, the quality with the lowest percentage of employers reporting “very difficult” or “somewhat difficult” to find is listed as “Rank 6.”

Figure 6: Top 5 Qualities Reported to be “Very Difficult” or “Somewhat Difficult” to Find by Occupational Cluster

Attitude, work ethic, timeliness, workplace demeanor	Problem-solving and/or analytical ability	Advanced communication, beyond basic English	Bilingualism	Customer service skills	Relevant work experience
--	---	--	--------------	-------------------------	--------------------------

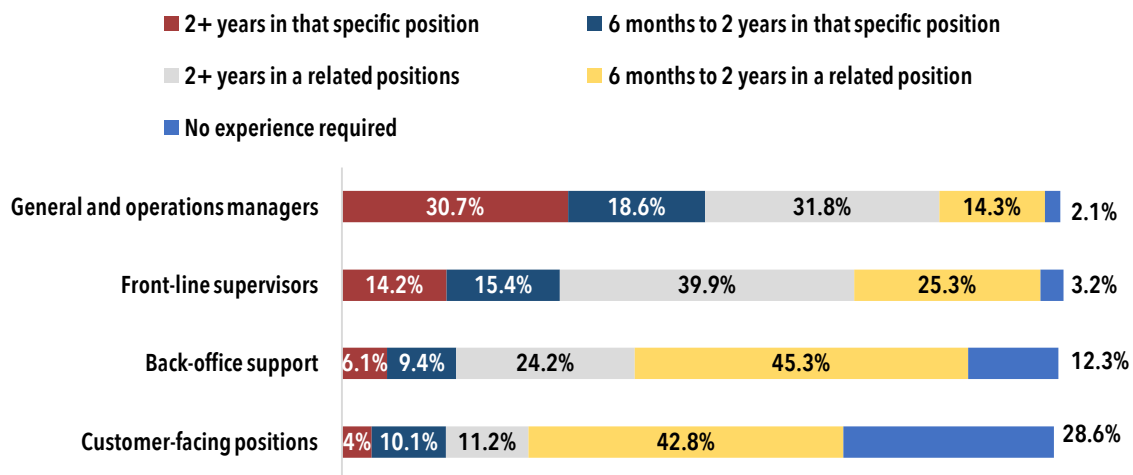
Customer-facing positions	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	Rank 6
Back-office support	2	1	4	5	6	3
Front-line supervisors	4	2	5	3	6	1
General and operations managers	5	2	3	6	4	1

For employees not directly in communication with customers on a regular basis, relevant work experience is more sought after. For back-office support, front-line supervisors, and general and operations managers, relevant work experience is both important and difficult for retail employers to find in qualified applicants. This difficulty was also relayed in the executive interviews conducted countywide.

*“It’s hard to find good candidates for back of the house positions... chefs, cooks and support chefs with the proper experience are not easy to find. [We’re] even having difficulty finding good managers and even applicants for our internal Manager in Training (MIT) program.”*  
– Chief Financial Officer, San Diego Restaurant Chain

Long-term experience in a specific position is most desired for management positions. Employers expressed greater experience requirements (more than two years in the specific position) for front-line supervisors and general and operations managers compared to customer-facing positions and back-office support (Figure 7).

Figure 7: Typical Experience Requirements by Occupational Cluster



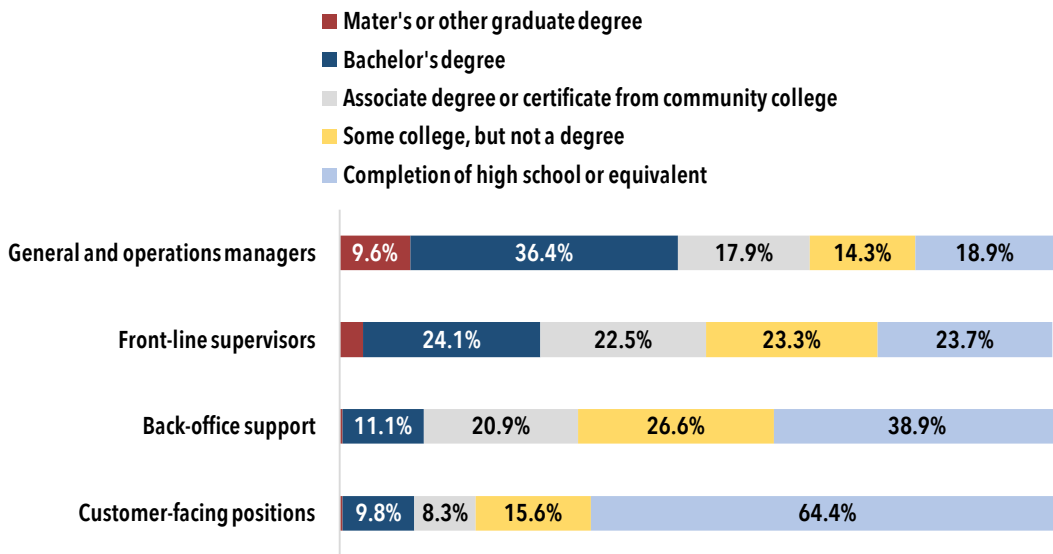
Many retail firms offer management pathways through in-house training programs.

*“We typically hire management from within. Anyone that works for us can enter our internal training program with a goal of becoming a shift supervisor or manager.”* – Human Resources Manager, San Diego County Hotel Restaurant

*“Successful completion of our 12-week Manager in Training (MIT) program, along with prior work experience, is crucial when reviewing applicants for management positions.” – Chief Financial Officer, San Diego Restaurant Chain*

Not surprisingly, higher education requirements are in place for front-line supervisors and general and operations managers at retail firms. More than 64 percent of employers require applicants to have only a high school degree or equivalency for customer-facing positions and nearly 39 percent require the same for back-office support workers (Figure 8).

**Figure 8: Typical Educational Requirements by Occupational Cluster**

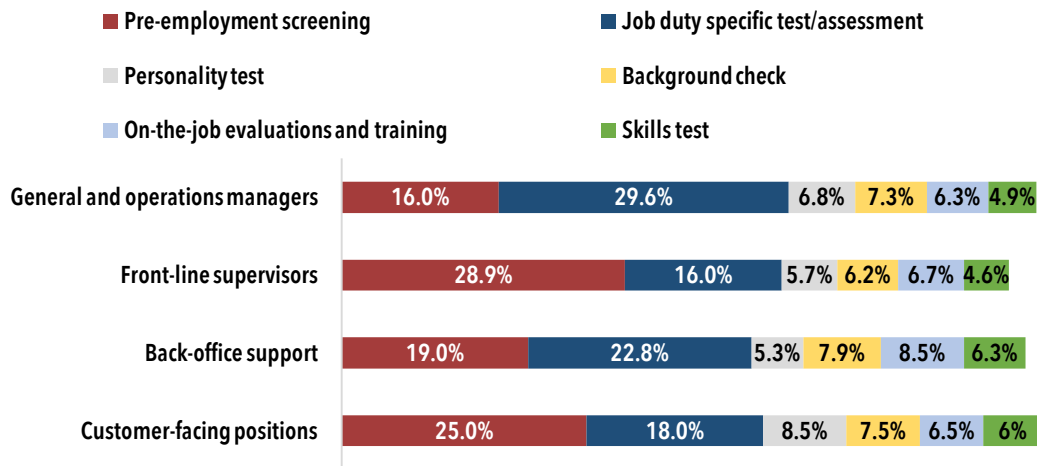


**Similar assessments and screening tools are utilized across the four occupational categories identified for the retail industry.** Pre-employment screening and job duty specific tests and/or assessments (Internet Collaborative Information Management Systems<sup>15</sup> software, product knowledge, predictive index, Criteria Corp<sup>16</sup>, etc.) were identified as the top two assessments and screening tools that employers utilize for customer-facing positions, back-office support, front-line supervisors, and general and operations managers (Figure 9).

<sup>15</sup> A cloud-based software that enables employers to find, screen and hire workers.

<sup>16</sup> A provider of pre-employment tests, including aptitude, personality and skills tests.

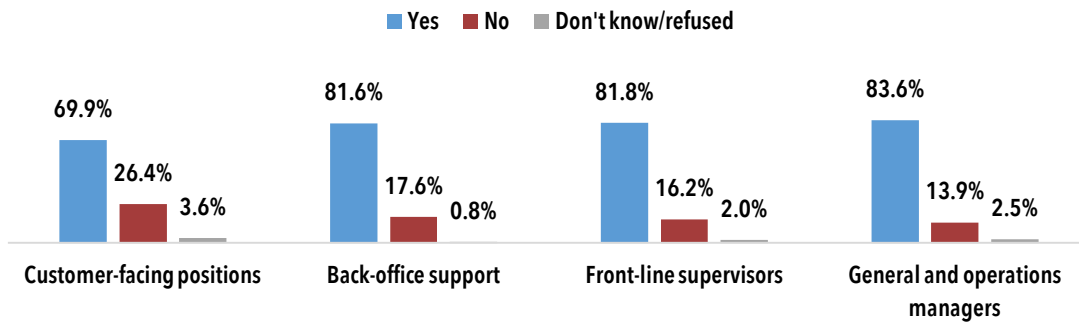
Figure 9: Retail Job Assessments and Screening Tools by Occupational Cluster



17

Unsurprisingly, retail employers conduct background checks across all occupational clusters. However, 26.4 percent of employers reported that they do not require background checks for certain customer-facing positions (Figure 10).

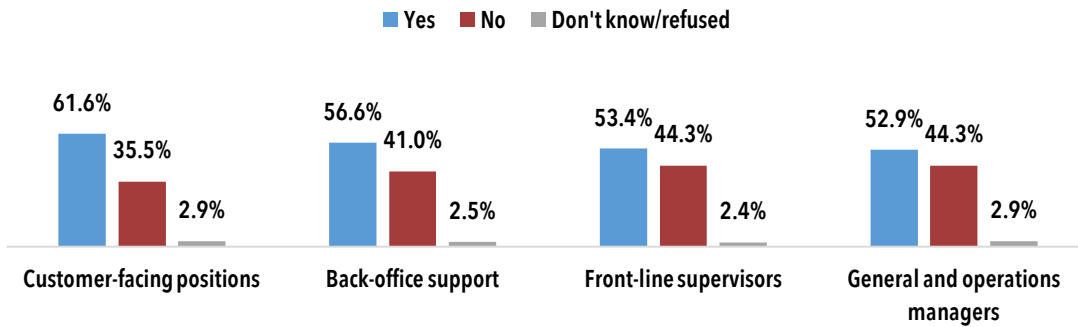
Figure 10: Employers Requiring Background Checks by Occupational Cluster



More than 50 percent of employers reported that each occupational cluster has physical requirements such as walking significant distances or lifting heavy objects. However, a significant percent (35 to 44 percent) of employers also reported that these positions do not necessarily have physical requirements (Figure 11).

<sup>17</sup> Other responses were omitted, including psychological testing (Myers-Briggs), drug test, unknown

Figure 11: Employers Reporting Physical Requirements Expected of Employees by Occupational Cluster



The following sections elaborate on these findings within each occupational cluster in more detail.

### Customer-facing Positions

Approximately 153,800 workers are employed as customer-facing positions in the retail industry in San Diego County. This represents over half (54 percent) of all retail employment countywide.<sup>18</sup> Employers surveyed for this study have more optimistic expectations of employment growth than U.S. Bureau of Labor Statistics projections for new jobs in customer-facing positions. Surveyed firms in the region expect customer-facing positions to grow by 5.8 percent over the next year compared to BLS's one-year 0.4 percent growth projection.<sup>19</sup> When factoring demand for replacement workers into BLS's projected growth, the percentage increases from 0.4 to 4.5 percent.<sup>20</sup>

In terms of skill sets, BLS describes customer-facing positions to be proficient in persuasion, active listening for both listening for both coworkers and customers, speaking, service orientation, negotiation, and social perceptiveness, among perceptiveness, among other skills.<sup>21</sup> Similarly, more than 80 percent of employers surveyed for this study reported study reported attitude, work ethic, timeliness, workplace demeanor and customer service skills to be "very important" "very important" qualities when considering applicants for customer-facing positions (

<sup>18</sup> Chmura Economics JobsEQ Q2 2016

<sup>19</sup> Chmura Economics JobsEQ Q2 2016

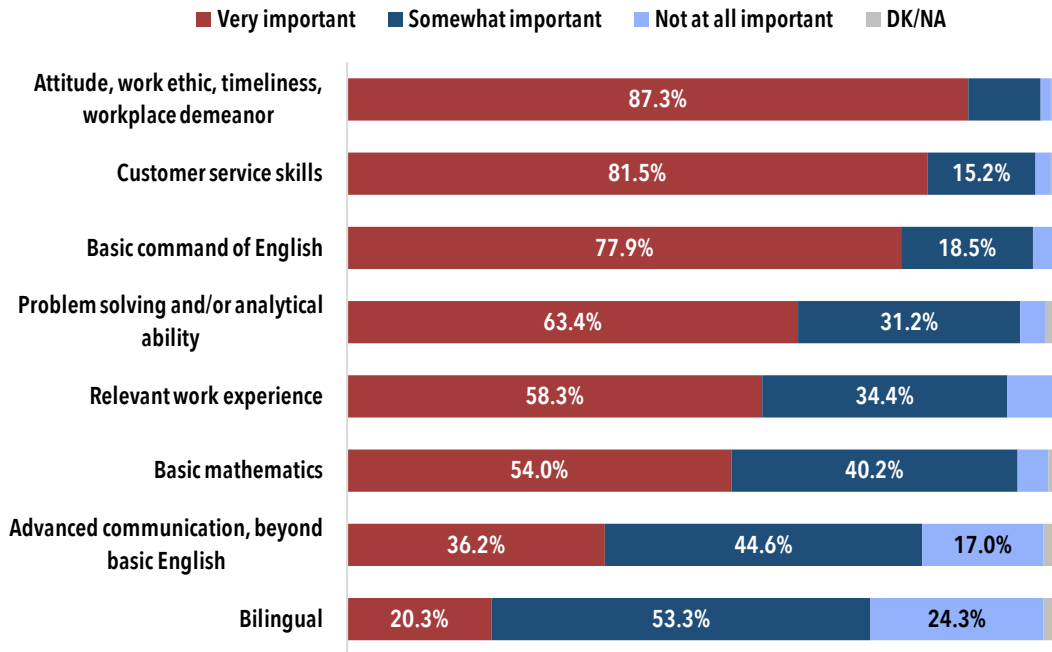
<sup>20</sup> Chmura Economics JobsEQ Q2 2016

<sup>21</sup> Bureau of Labor Statistics and O\*NET Online



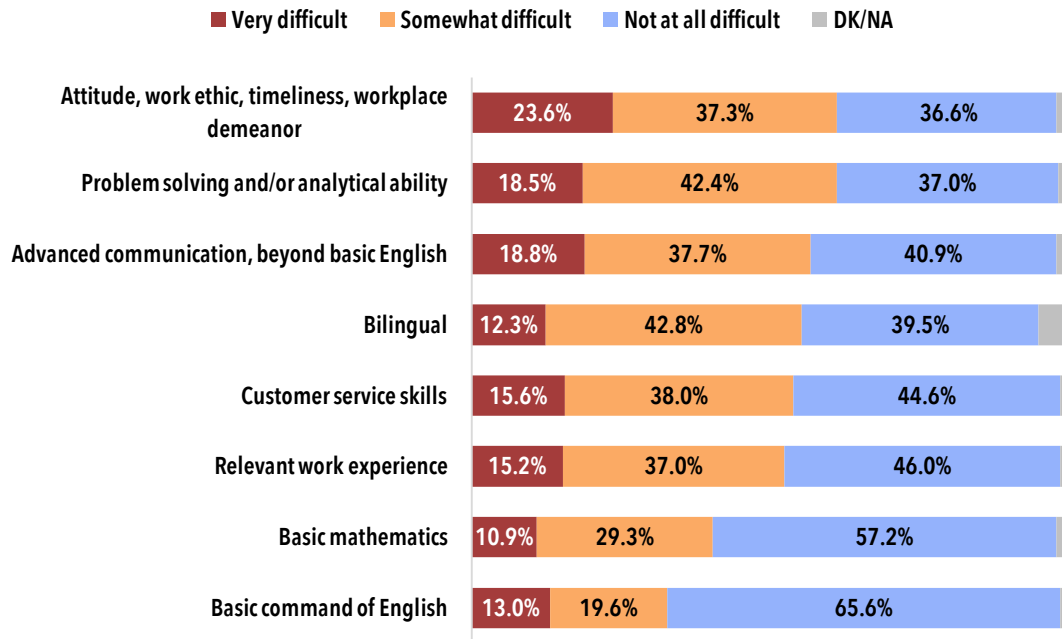
Figure 12).

Figure 12: Importance of Qualities When Considering Applicants for Customer-facing Positions<sup>22</sup>



In terms of difficulty in finding qualified applicants for customer-facing positions, more than 60 percent of employers ranked attitude, work ethic, timeliness and workplace demeanor as well as problem solving and/or analytical ability as the top elements that were “very difficult” or “somewhat difficult” to find in applicants (Figure 6).

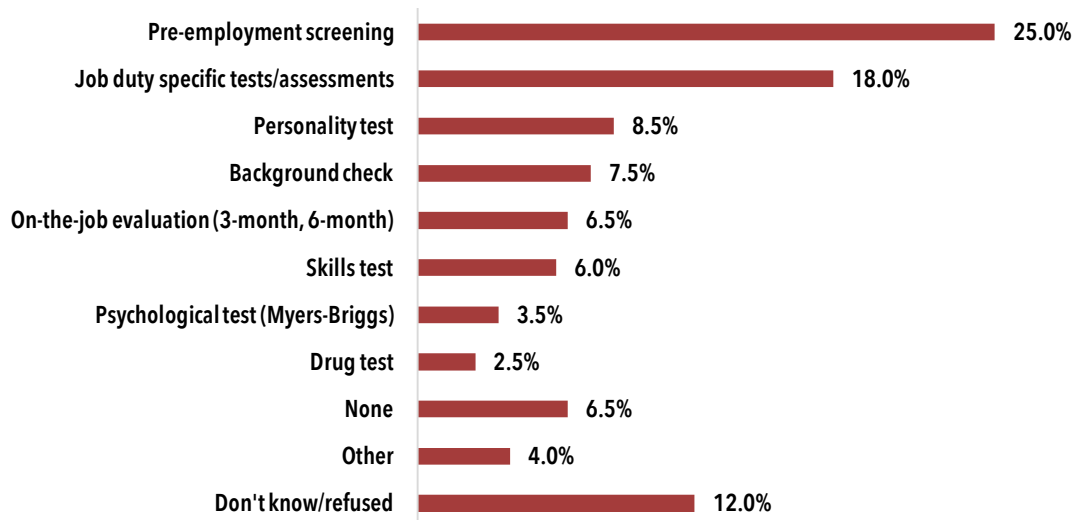
<sup>22</sup> n= 276

Figure 13: Level of Difficulty Finding Qualified Applicants for Different Elements in Customer-facing Positions<sup>23</sup>

The top three assessments and screening tools used by retail organizations for customer-facing positions (new hires and promotions) are:

- Pre-employment screening – 25 percent
- Job duty specific tests/assessments – 18 percent<sup>24</sup>
- Personality tests – 9 percent

Figure 14: Assessments and Screening Tools for Customer-facing Positions



<sup>23</sup> n=276

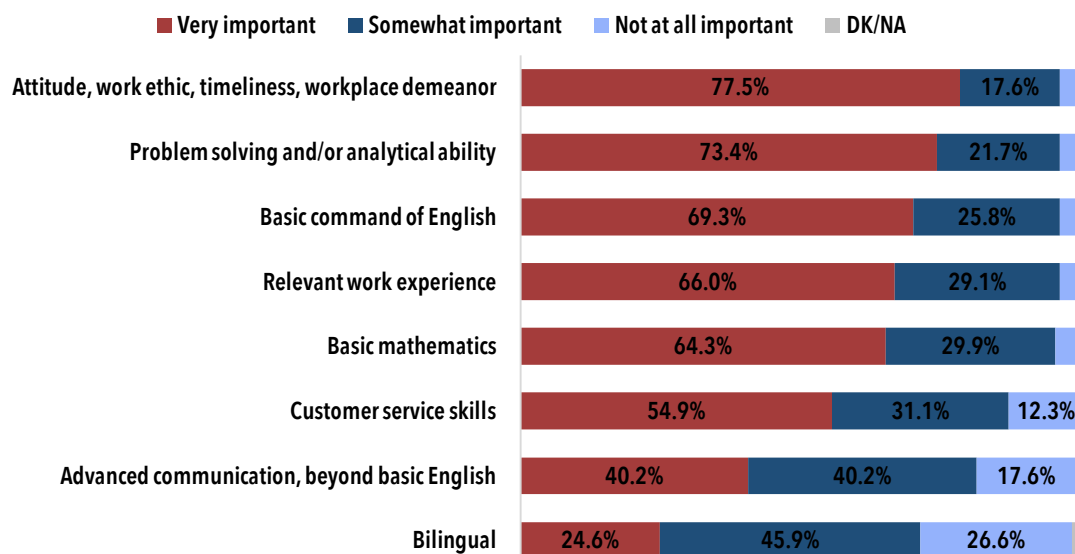
<sup>24</sup> ICIMS, product knowledge, predictive index, criteria corp, etc.

## Back-office Support

Just under 62,000 workers are employed in back-office support positions for retail firms in San Diego County. This represents over one-fifth of retail employment in San Diego County.<sup>25</sup> Similar to customer-facing positions, employers expect back-office support to grow by 5.8 percent over the 12 months. Again, retail firms expressed greater optimism for back-office support growth when compared to Chmura Economics using Bureau of Labor Statistics (BLS) one-year growth projections for the county (0.5 percent). When factoring in total growth and replacement demand for customer-facing positions over the next 12 months, the percentage increases to 3.4 percent for BLS projections. It is important to note when comparing primary and secondary data, that secondary data generates projections based on historical trends, while direct employer responses are based on current trends or recent changes in the industry. Respondent-based employer projections tend to be more of a measure of “top-of-mind” issues.

At least two-thirds of retail employers surveyed indicated that attitude, work ethic, timeliness, workplace demeanor (77 percent), problem solving and/or analytical ability (73 percent), basic command of English (69 percent), and relevant work experience (66 percent) are “Very important” when considering applicants for back-office support occupations. More than a quarter of responding employers said that bilingualism was “Not at all important” (27 percent) for back-office support applicants at their firm.

Figure 15: Importance of Qualities When Considering Applicants for Back-office Support<sup>26</sup>



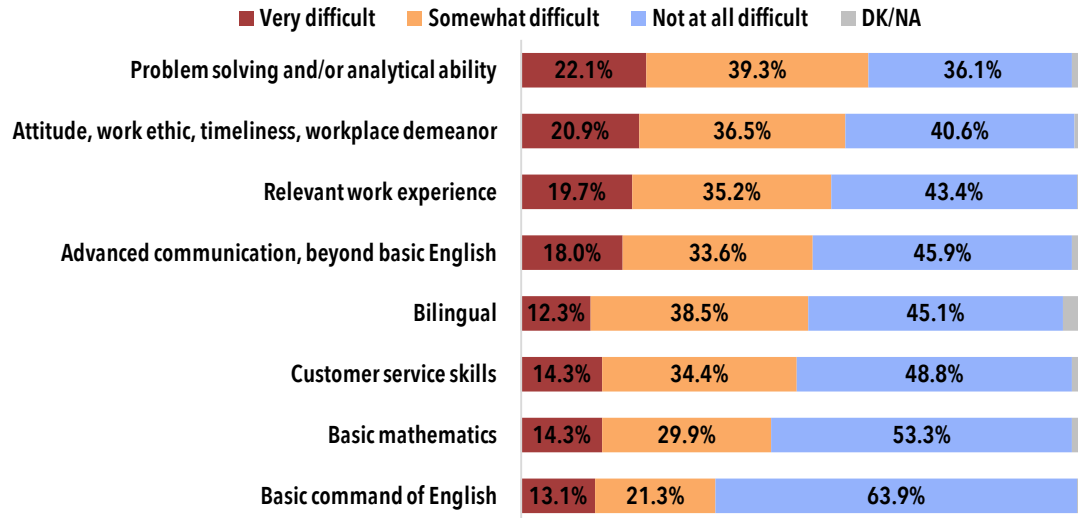
A majority of retail employers specified overall difficulty (“Very difficult” or “Somewhat difficult”) finding qualified applicants for back-office support positions that have problem solving and/or analytical ability (62 percent), attitude, work ethic, timeliness, workplace demeanor (57 percent), relevant work experience (55 percent), advanced communication, beyond English (52 percent), or are bilingual (51 percent).

<sup>25</sup> Source: Chmura Economics JobsEQ Q2 2016

<sup>26</sup> n=244

More than half of all employers said that it was “Not at all difficult” finding qualified applicants that have a basic command of English (64 percent) or have basic mathematics skills (53 percent).

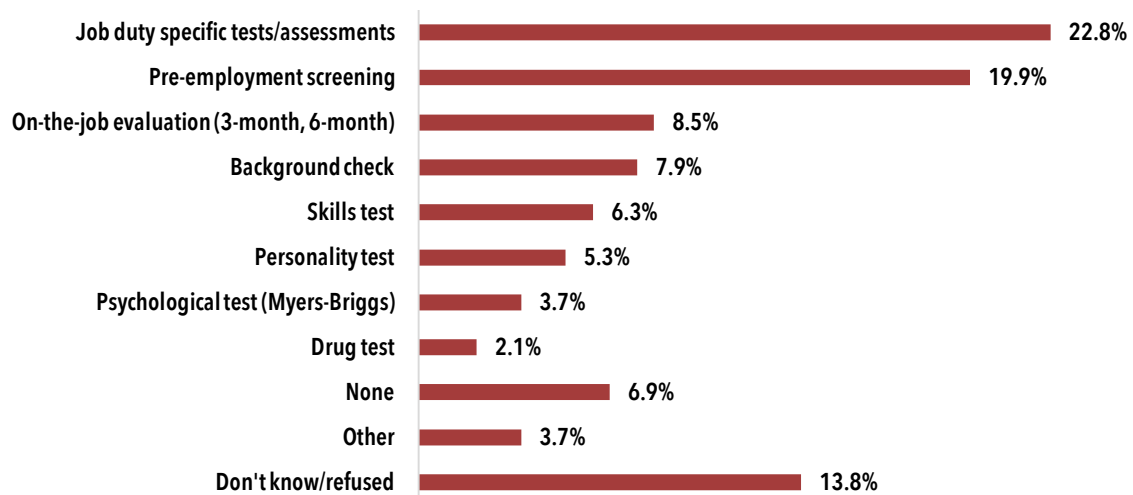
Figure 16: Level of Difficulty Finding Qualified Applicants for Different Elements for Back-office Support<sup>27</sup>



The top three assessments and screening tools used by retail organizations for back-office support positions (new hires and promotions) are:

- Job duty specific tests/assessments<sup>28</sup> – 23 percent
- Pre-employment screening – 19 percent
- On the job evaluations and training<sup>29</sup> – 8 percent

Figure 17: Assessments and Screening Tools for Back-office Support<sup>30</sup>



<sup>27</sup> n=244

<sup>28</sup> ICIMS, product knowledge, predictive index, criteria corp, etc.

<sup>29</sup> At 3-month, 6-month, etc. intervals.

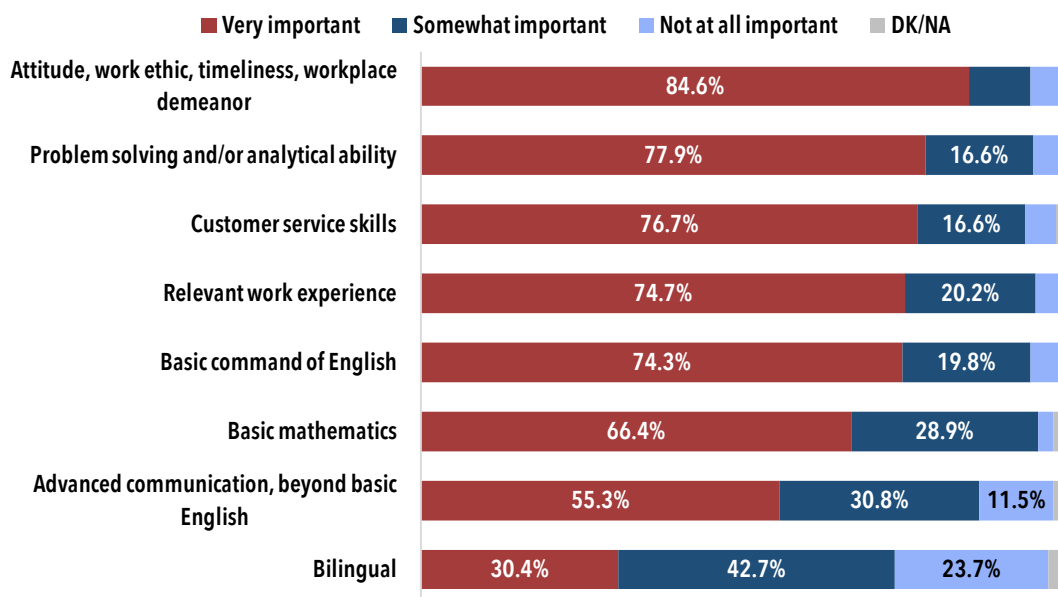
<sup>30</sup> n = 189

## Front-line Supervisors

Just over seven percent of workers in the retail industry in San Diego County fall under the front-line supervisors category (21,300 employees).<sup>31</sup> Surveyed employers predicted that front-line supervisors would increase by 9.8 percent at their locations over the following 12 months. The expectations of retail firms countywide outpace the projection (0.6 percent) of Chmura Economics and the Bureau of Labor Statistics (BLS). When factoring in total growth and replacement demand for customer-facing positions over the next 12 months, the percentage increases to 3.3 percent for BLS projections.

At least three-quarters of retail employers indicated that attitude, work ethic, timeliness, workplace demeanor (85 percent), problem solving and/or analytical ability (78 percent), customer service skills (77 percent), and relevant work experience (75 percent) were “Very important” when considering applicants for front-line supervisor positions.

Figure 18: Importance of Elements When Considering Applicants for Front-line Supervisors<sup>32</sup>



The highest degree of overall difficulty for retailers exists with finding qualified applicants for front-line management positions that have relevant work experience (21 percent “very difficult” and 42 percent “somewhat difficult”). More than half of employers expressed overall difficulty finding applicants with problem solving and/or analytical ability (55 percent), that are bilingual (53 percent), and have attitude, work ethic, timeliness and work demeanor that met the organization’s standards (52 percent).

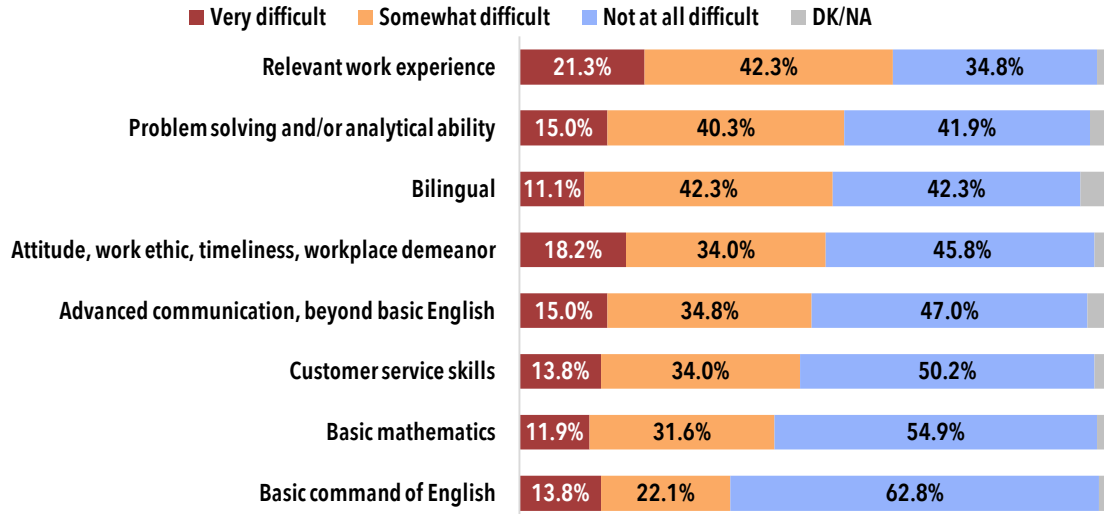
Figure 19: Level of Difficulty Finding Qualified Applicants for Different Elements for Front-line Supervisors<sup>33</sup>

<sup>31</sup> Source: Chmura Economics JobsEQ Q2 2016

<sup>32</sup> n = 253

<sup>33</sup> n = 253

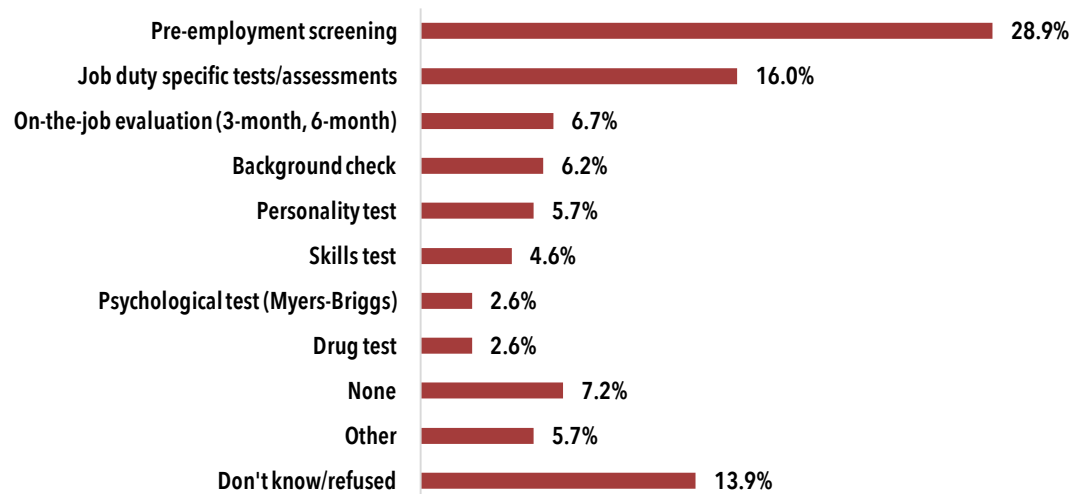




The top three assessments and screening tools used by retail organizations for front-line management (new hires and promotions) are:

- Pre-employment screening – 29 percent
- Job duty specific tests/assessments<sup>34</sup> – 16 percent
- On the job evaluations and training<sup>35</sup> – 8 percent

Figure 20: Assessments and Screening Tools for Front-line Supervisors<sup>36</sup>



## General and Operations Managers

The smallest category of occupations from the identified categories, general and operations managers account for under 2 percent of total retail employment in San Diego County.<sup>37</sup> Retail employers

<sup>34</sup> ICIMS, product knowledge, predictive index, criteria corp, etc.

<sup>35</sup> At 3-month, 6-month, etc. intervals.

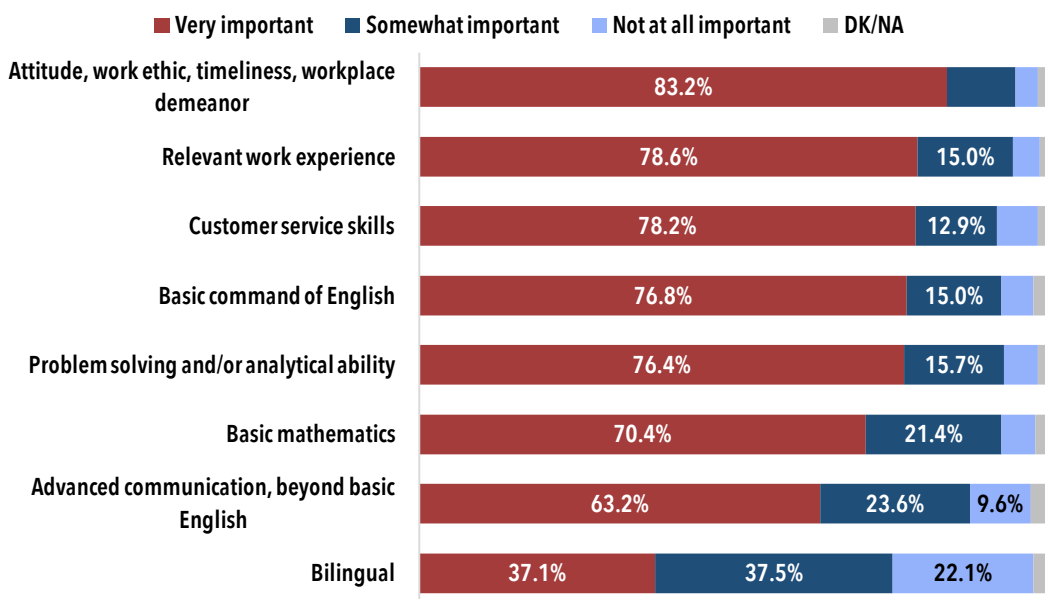
<sup>36</sup> n = 194

<sup>37</sup> Source: Chmura Economics JobsEQ Q2 2016

predicted that the general and operations managers occupational category would experience growth of 6.9 percent at their locations over the coming year. The expectations of retail firms countywide outpace the projection (2.6 percent) of Chmura Economics and the Bureau of Labor Statistics (BLS). When factoring in total growth and replacement demand for customer-facing positions over the next 12 months, the percentage increases to 3.0 percent for BLS projections.

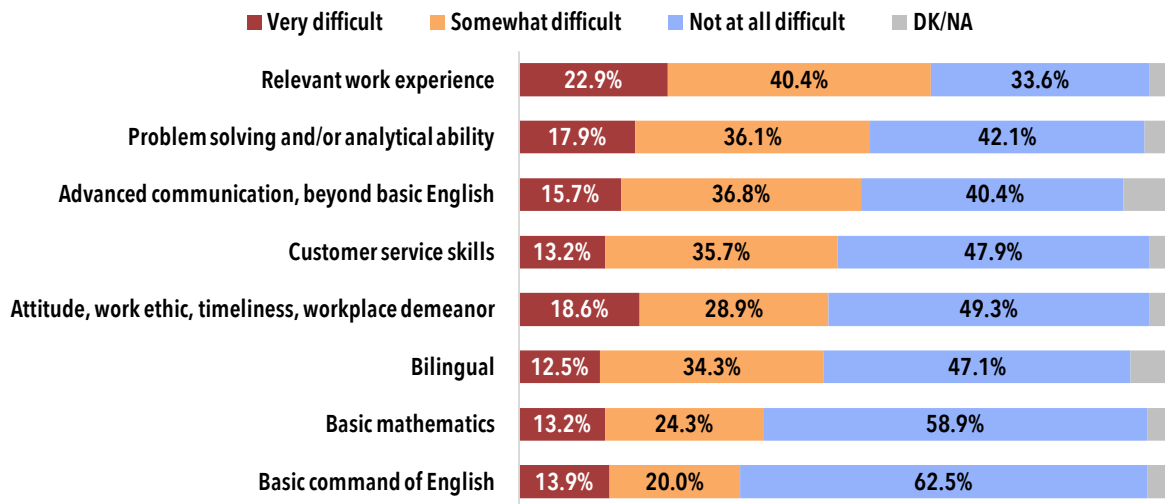
Attitude, work ethic, timeliness, and workplace demeanor received a “Very important” rating from more than four-in-five retail employers (83 percent “very important”). Five additional elements in the figure below received “very important” ratings from more than three quarters of retail firms surveyed; relevant work experience: 79 percent; customer service skills: 78 percent; basic command of English: 77 percent; and, problem solving and/or analytical ability: 76 percent.

Figure 21: Importance of Qualities When Considering Applicants for General and Operations Managers<sup>38</sup>



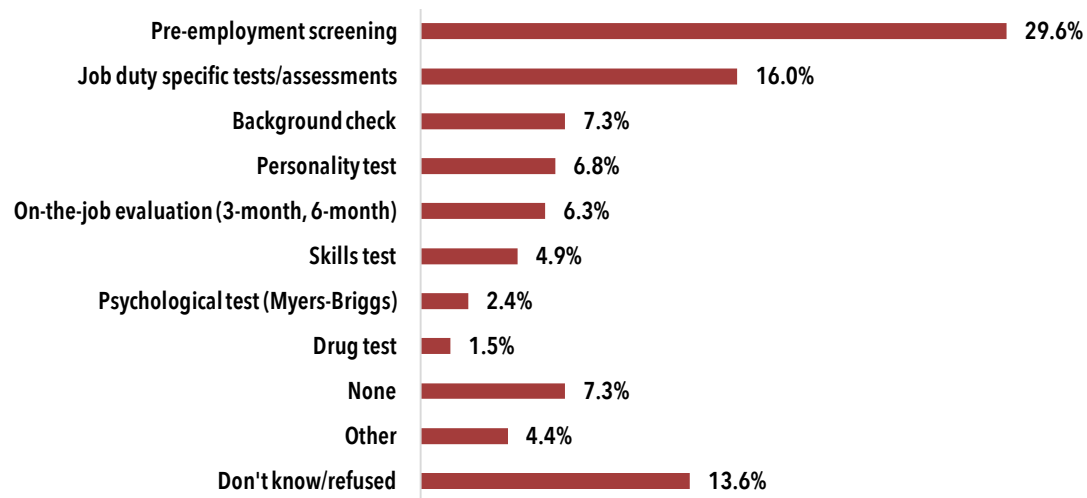
More than half of retail employers expressed at least some level of difficulty (“Very difficult” or “Somewhat difficult”) with finding qualified applicants for general and operations managers that have relevant work experience (63 percent), problem solving and/or analytical ability (54 percent), and advanced communication, beyond basic English (53 percent). A majority of retail firms responded “Not at all difficult” when asked to rate the difficulty of finding qualified general and operations manager applicants with a basic command of English (63 percent) and basic mathematics (59 percent).

<sup>38</sup> n = 280

Figure 22: Level of Difficulty Finding Qualified Applicants for Different Elements for General and Operations Managers<sup>39</sup>

The top three assessments and screening tools used by retail organizations for general and operations managers (new hires and promotions) are:

- Pre-employment screening – 30 percent
- Job duty specific tests/assessments<sup>40</sup> – 16 percent
- Personality test – 7 percent

Figure 23: Assessments and Screening Tools for General and Operations Managers<sup>41</sup>

<sup>39</sup> n = 280

<sup>40</sup> ICIMS, product knowledge, predictive index, criteria corp, etc.

<sup>41</sup> n = 206

## RETAIL EMPLOYMENT SUPPLY

While the previous section detailed employer demand for qualities, education and experience for new retail hires in the four occupational clusters, the following section will explain the region's supply of potential retail employees.

As of 2015, San Diego County was the fifth most populous county in the United States with approximately 3.3 million people. Of those, 2.2 million individuals are of working age (between 16 and 64 years of age). The retail industry currently employs 286,100 workers in San Diego County, however, when examining occupations with some lateral mobility between the retail industry and other industries, the employment supply increases to roughly 466,700 workers. Because skillsets learned in the retail industry are transferable to occupations within other industries, retail establishments effectively increase the supply of experienced workers for other industries as well. These individuals work in various positions that can traverse several industries (transportation and warehousing, professional and technical services, wholesale trade, finance and insurance, etc.) and include front-line supervisors of office and administrative support workers, office clerks (general), general and operations managers, packers and packagers, secretaries and administrative assistants, and traditional retail occupations (cashiers, retail salespersons, parts salespersons).

San Diego County residents possess higher educational attainment compared to the state as a whole. Forty-five percent of residents aged 25 to 64 years in the county have an associate degree or higher compared to just under 40 percent of all California residents.<sup>42</sup> Retail employment supply has lower educational attainment when compared to the overall employment supply in the county, with just over 35 percent of all workers in possession of an associate degree or higher. This cohort is also much more likely to possess a high school diploma or less (42 percent) compared to the overall workforce in San Diego County (32 percent).

The average wage for all positions employed in San Diego County is \$28.00 an hour or \$58,238 per year. Wages are slightly lower for the county compared to California as a whole (\$30.00 per hour or \$62,417 per year). Retail workers in San Diego County make an average annual wage of \$28,628 compared to \$29,921 in California overall.<sup>43</sup> Average wages vary greatly for various retail occupations. Pharmacists (\$61.92 per hour or \$128,800 per year) and general and operations managers (\$60.33 per hour or \$125,500 per year) earn well over \$100,000 in average annual wages per year. At the other end of the spectrum, dishwashers (\$10.19 per hour or \$21,200 per year) and hosts and hostesses (\$10.34 per hour or \$21,500 per year) make far less in average annual wages.

---

<sup>42</sup> Source: Chmura Economics JobsEQ Q2 2016

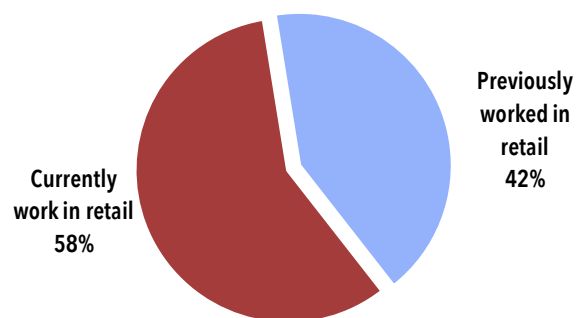
<sup>43</sup> Source: Chmura Economics Jobs EQ Q2 2016

## EMPLOYEE ETHNOGRAPHY

In addition to surveying retail employers in San Diego County, BW Research also recruited 67 current and former retail workers within the county to provide insight into the supply side of the industry. These individuals participated in a survey to provide deeper understanding on successful career strategies within and outside of retail fields. Questions covered individual pathways to career advancement, barriers and potential solutions to move forward in retail and other occupations.

Respondents to the ethnography were split between current retail workers (58 percent) and workers that had previously worked in retail (42 percent). Quotas for the two groups were established in order to understand career progression from differing professional perspectives.

Figure 24: Status of Retail Industry Employment<sup>44</sup>



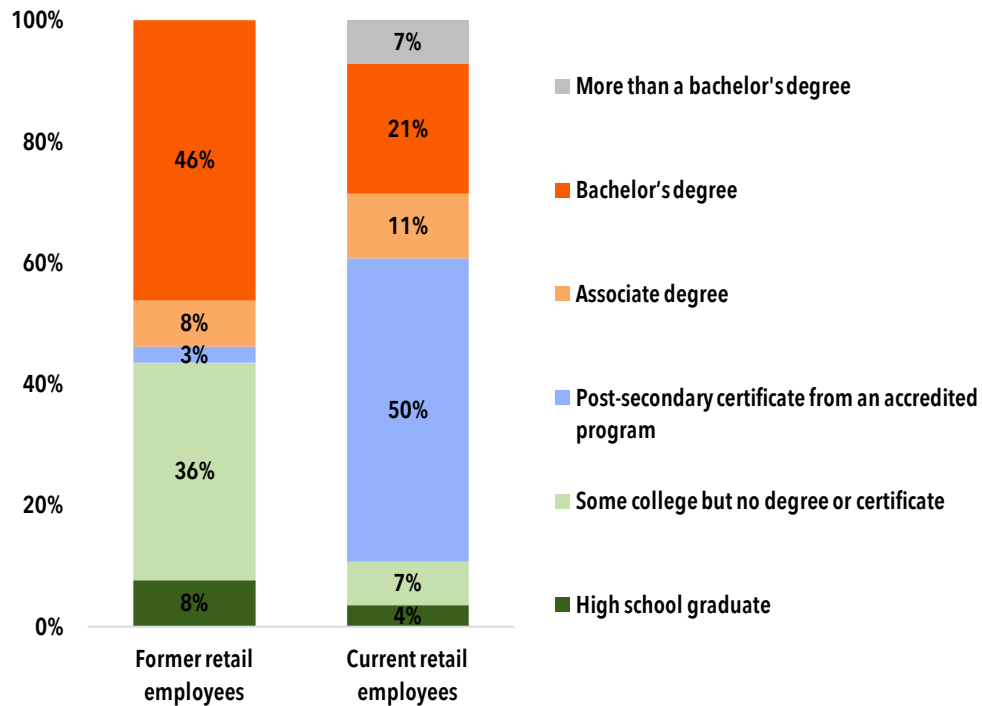
More than half of current retail employees reported that they worked within clothing and clothing accessory stores (21 percent), e-commerce or online/electronic shopping (15 percent), food and beverage stores, including grocery stores and supermarkets (13 percent), and building materials or garden supply stores, including home centers and hardware stores (10 percent). The largest proportions of former retail employees indicated that they had transitioned to work in educational services (21 percent), professional, scientific and technical services (11 percent), and wholesale trade (11 percent).

Approximately three-in-five retail (59 percent) workers currently manage or supervise staff in their current position in comparison to just under a third (32 percent) of former retail employees.

<sup>44</sup> n = 67

The following figure illustrates the educational attainment levels of current and former retail workers. Nearly half of former retail workers surveyed were in possession of a bachelor's degree or more (46 percent), while less than a third (28 percent) of current retail workers reported the same level of educational attainment. Half of current retail workers (50 percent) indicated their completion of a post-secondary certificate from an accredited program compared to just 3 percent of former retail workers.

Figure 25: Highest Educational Attainment by Former or Current Retail Employees



The top two degrees or primary fields of study for all **current retail workers** that had an associate degree or higher include:

- Business or Management (52 percent)
- Information Technology (14 percent)

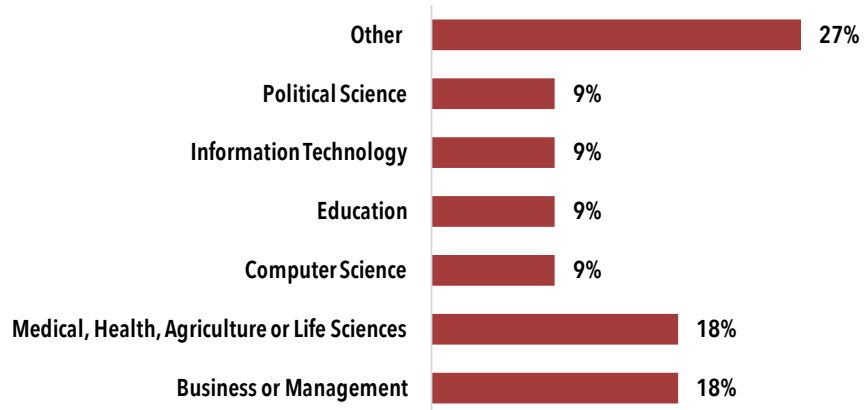
The top five degrees or primary fields of study for all **former retail workers** that had an associate degree or higher include:<sup>45</sup>

- Business or Management (18 percent)
- Medical, Health, Agriculture or Life Sciences (18 percent)
- Computer Science (nine percent)
- Education (nine percent)
- Information Technology (nine percent)

<sup>45</sup> These were the only programs with more than one response



Figure 26: Degree or Primary Field of Study for Former Retail Workers



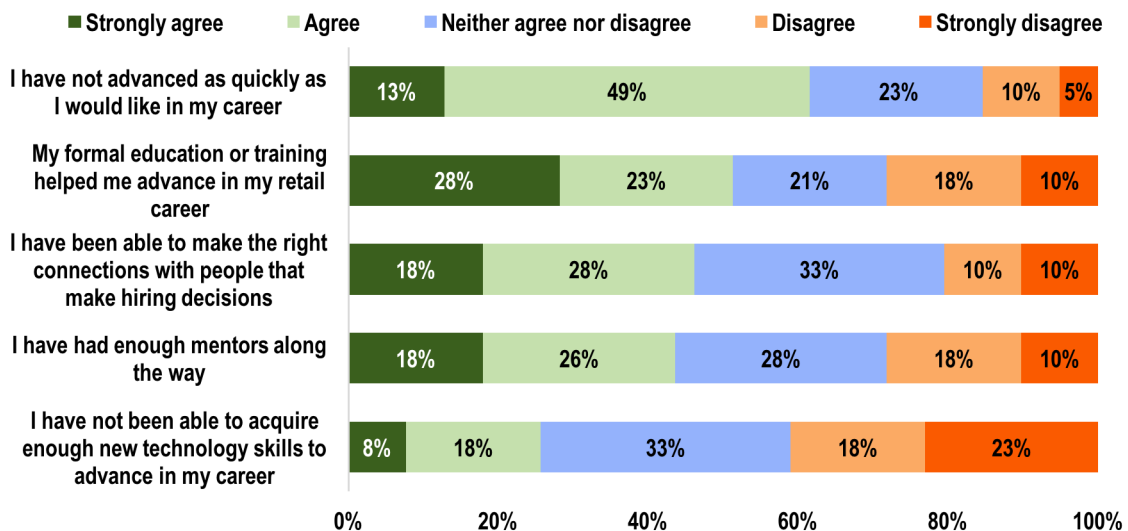
### Current Retail Career Progression

Employees currently working in retail professions were asked a separate set of questions related to their career in the retail industry. First, retail workers were asked to select a statement that most accurately describes their career in retail. Respondents (41 percent) offered a positive assessment about their current career, indicating that they have successfully moved up the career ladder and continue to grow in their position. The full list of responses includes:

- I have successfully moved up the career ladder and continue to grow in my position (41 percent)
- I have not advanced successfully and feel stuck in my current position (23 percent)
- I have successfully advanced in terms of pay and responsibility, but not as quickly as I'd like (15 percent)
- I have successfully moved between jobs with satisfying lateral moves but have not advanced in terms of pay or responsibility (13 percent)
- None of the above (8 percent)

The following figure (Figure 27) illustrates current retail workers' agreement with multiple statements related to their career in retail. The highest level of overall agreement from respondents was for "I have not advanced as quickly as I would like in my career" (62 percent: 13 percent "Strongly agree" and 49 percent "Agree"). More than a quarter of retail workers (28 percent) said that they "Strongly agree" with the statement "My formal education or training helped me advance in my retail career," the highest among all elements tested.

Figure 27: Agreement with Elements of Retail Career



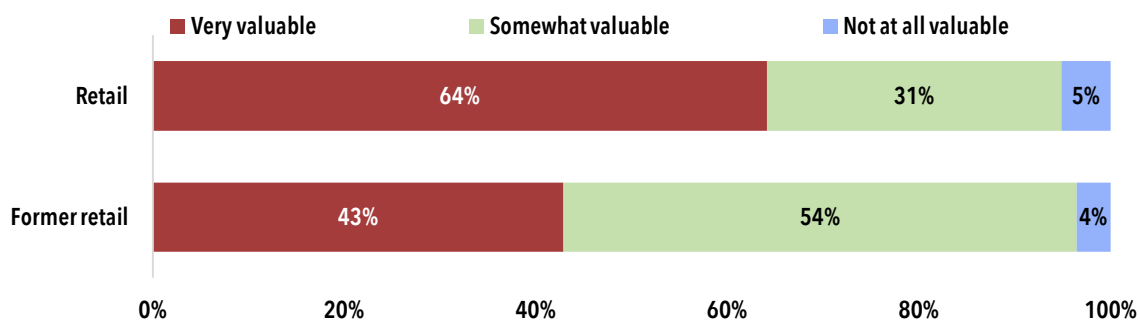
More than three-quarters of current retail employees (77 percent) said that they have not received any formal career training, such as management classes, from their retail employer.

## Career Navigation

Both current and former retail workers listed being driven (commitment to goals, etc.), work ethic, and acquired skills as the top three factors that they believe contribute the most to helping them succeed in their overall careers. Working as part of a team, customer service, and adaptability were the top three elements learned from the retail industry in particular that current and former retail workers felt contribute the most to helping them succeed in their careers.

Workers currently employed in the retail industry were more likely to rate retail industry work experience as “Very valuable” when compared to employees that had previously been employed in retail (64 percent vs. 43 percent).

Figure 28: Value of Retail Industry Work Experience



Current retail employees indicated that they had participated in a formal career mentoring program by their employer as a mentor at a greater rate (34 percent overall; 21 percent currently participating as a mentor and 13 percent previously participated as a mentor) than former retail workers (11 percent overall; 4 percent currently participating as a mentor and seven percent previously participated as a mentor).

Next, employees from each cohort were asked to select from a list of items that have been important in their career navigation. The following elements represent the top three responses by worker group<sup>46</sup>:

- **Current Retail Employees**
  - Self-guided learning and experimenting – 46 percent
  - Previous work experience – 41 percent
  - In-person networking – 33 percent
- **Former Retail Employees**
  - Previous work experience – 68 percent
  - Self-guided learning and experimenting – 57 percent
  - On-the-job training at current employer – 54 percent

<sup>46</sup> Multiple responses permitted

The following figures illustrate the level of importance that current and former retail employees place on activities as they relate to career advancement. The order of overall importance ratings is similar amongst the different employee cohorts, with networking and self-awareness switching positions for the two groups.

Figure 29: Importance of Activities Related to Career Advancement for Current Retail Employees

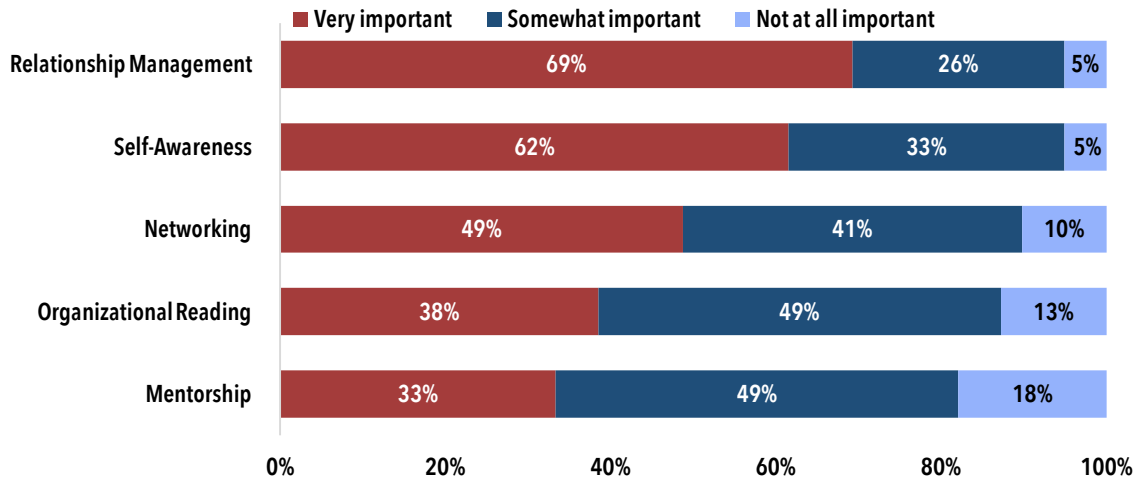
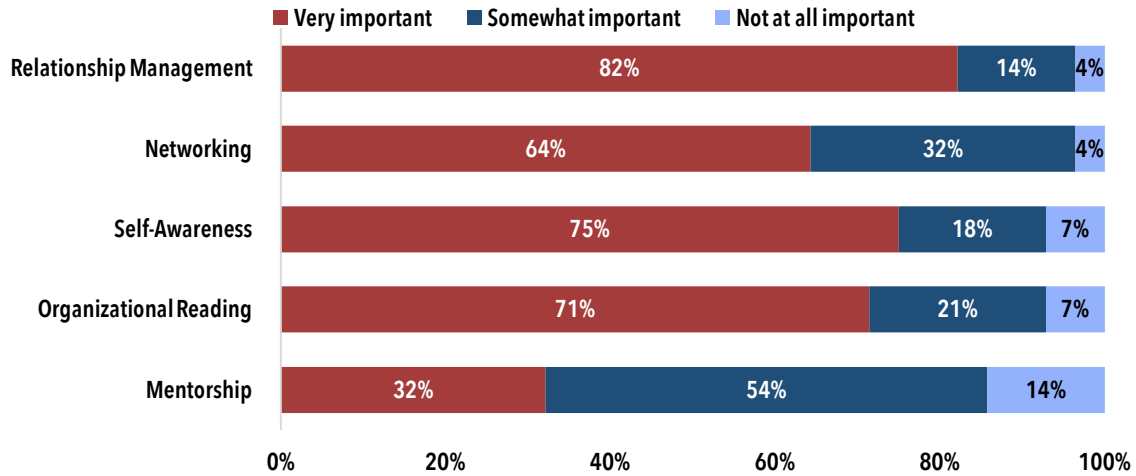


Figure 30: Importance of Activities Related to Career Advancement for Former Retail Employees



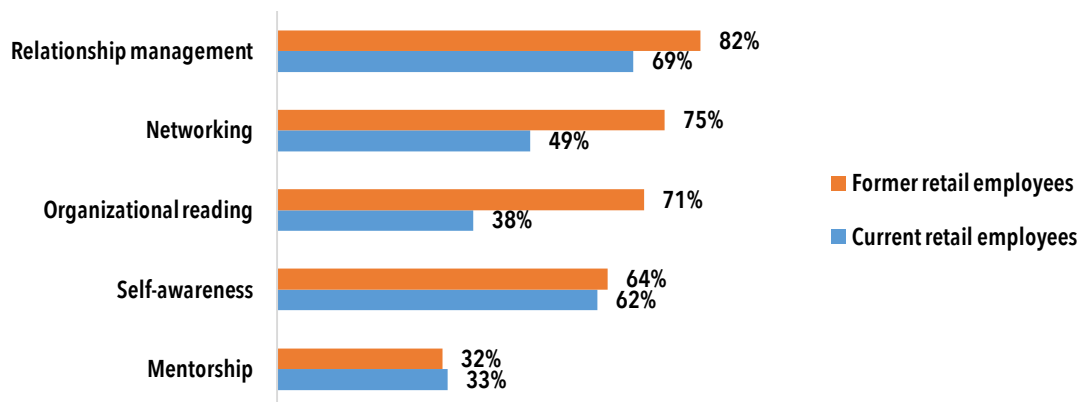
## KEY FINDINGS AND RECOMMENDATIONS

**Finding 1:** Skills and attributes that lead to career advancement in retail include relationship management, customer service skills, and work ethic.

### Relationship management

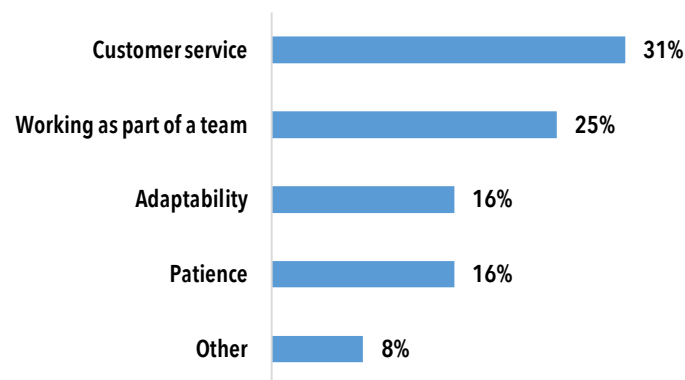
When asked to rate the importance of the following activities for their career advancement, both current and former retail employees overwhelmingly indicated relationship management as the most important activity in advancing their careers.

Figure 31: Importance of Activities Related to Career Advancement by Current and Former San Diego Retail Employees



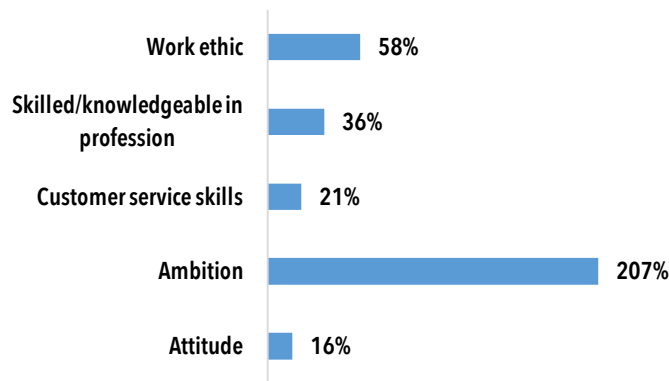
### Customer service

The top five skills that current and former employees reported learning from retail that contributed the most to helping them succeed in their career include:



### Work ethic

The top five most important characteristics, skills or attributes that employers look for when considering promoting an existing worker to a management or professional position include:



→ **Recommendation 1**

Workforce development programs that support retail career advancement should focus on relationship management (maintaining personal connections, taking notes on contacts, demonstrating value in professional conversations, and being a good listener), customer service skills development, and emphasis on work ethics.

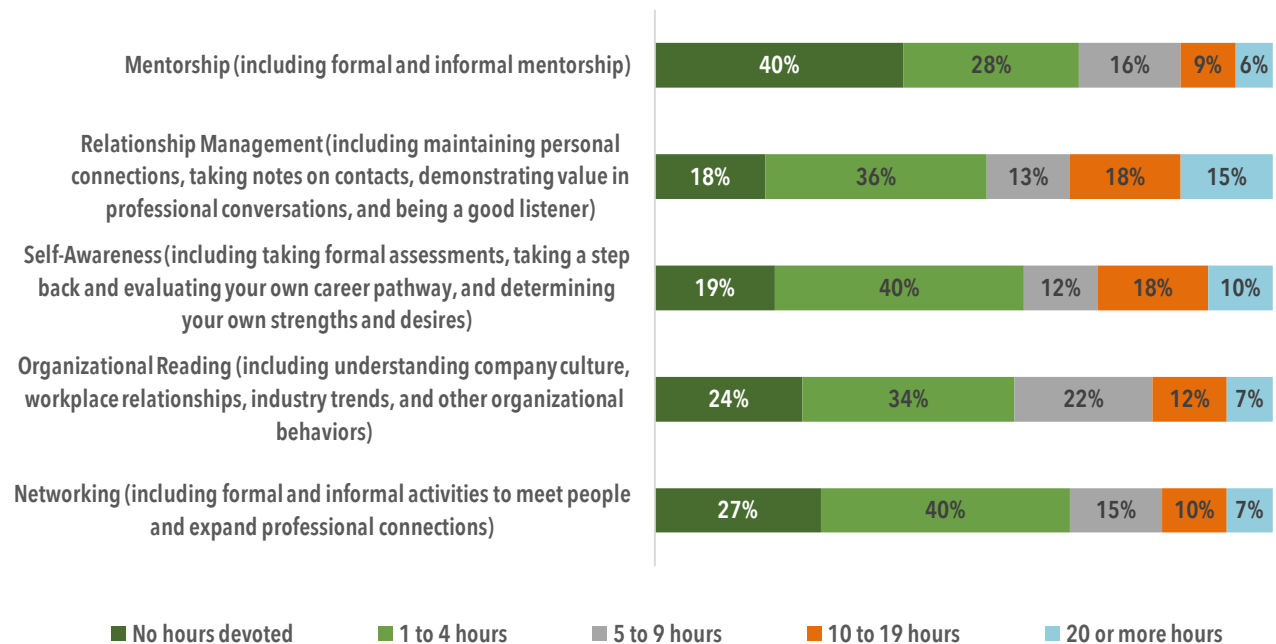
**Finding 2:** Employers have found it to be “very difficult” to find qualified front-line supervisors and managers with relevant work experience, and 23 percent of current retail workers agreed with the statement, “I have not advanced successfully and feel stuck in my current position.”

→ **Recommendation 2**

Employers that want to retain current workers and promote from within would benefit from developing internal training programs that provide current workers with the relevant work experience what would allow them to advance to higher positions.

**Finding 3:** Forty percent of current/former employees report that they devote no hours to mentorships; 27 percent report devoting no hours to networking, and 24 percent report devoting no hours to organizational reading. Furthermore, firms and employers are not very likely to offer formal career mentoring programs; three-quarters of respondents report that they have never participated in a formal career mentoring program offered by their employer.





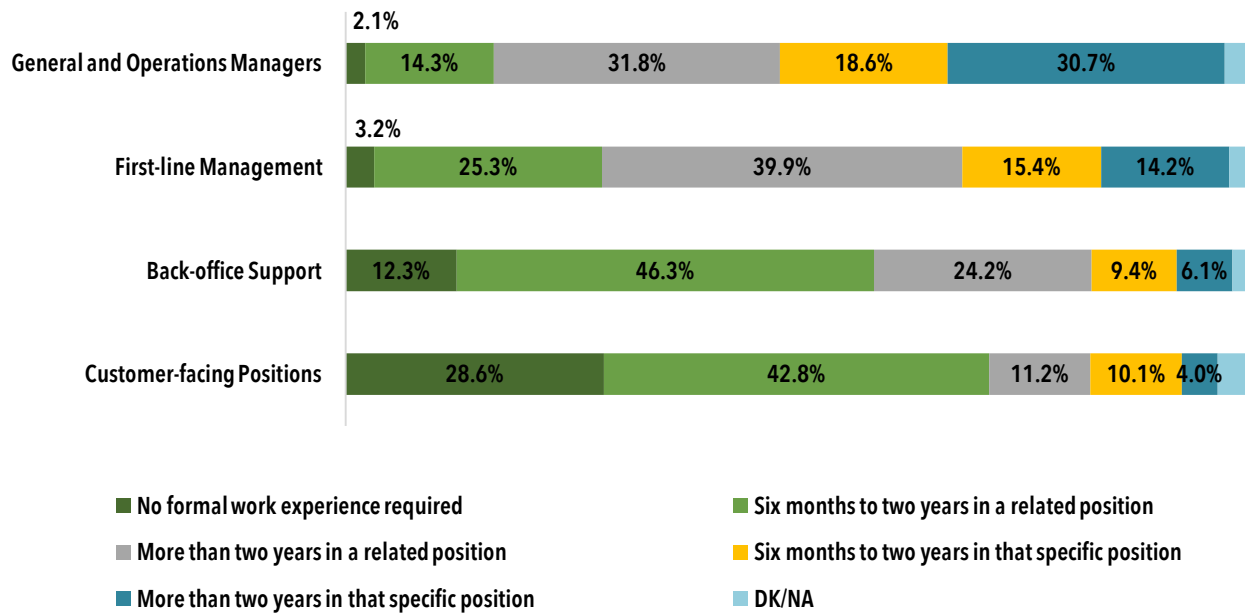
→ **Recommendation 3:** Employers would benefit from investing more in offering formal mentorship programs within their own companies to help develop their workers.

**Finding 4:** Current and former retail employees reported self-awareness (taking formal assessments, taking a step back and evaluating your own career pathway, and determining your own strengths and desires) to be the second most important activity in advancing their careers, yet 59 percent report spending less than four hours on this activity.

→ **Recommendation 4:** Current and prospective retail workers would benefit from assessing their self-awareness of what they want in their careers as 51 percent of these workers indicated that the “self-guided learning and experimenting” contributed to their successful career navigation (ability to successfully advance to new jobs with increased pay and responsibilities).

**Finding 5:** Customer-facing positions are least likely to require formal work experience upon hire, while management positions—either front-line or general and operations—are expected to have at least six months to two years, if not more, experience in related or specific positions. Interestingly, back-office support employees are also required to have experience in a related position.

For customer-facing and back-office support positions, employers report that the most important skills are non-technical (work ethic, attitude, communication, customer service, etc.). As retail workers move up the career ladder to front-line and general or operations managers, work experience and technical skills such as problem-solving and basic mathematics become more important. Across the board, the most difficult skill to find is problem-solving. However, for high-level management positions, over half of employers report that work experience is the most difficult element to find.



→ **Recommendation 5:** Employers expect front-line, general, and operations managers to have experience in either a related or specific position, yet also report that this work experience is most difficult to find for retail managers. Improved emphasis on career pathways within an organization may support not only employer demand, but also professional skill development and upward mobility for retail workers currently in customer-facing or back-office positions.



## APPENDIX A – METHODOLOGY

Data compiled for this report were drawn from both primary and secondary data sources. The following table provides a brief overview of the methodology utilized for the survey research component of the project. BW Research also completed a survey of current and former retail employees and follow-up qualitative executive interviews with several with industry employers.

Table 1: Overview of Survey Methodology

<b>Method</b>	Telephone and Web Survey of retail businesses in San Diego County and Southern California and a Web Survey of Current and Former Retail Employees in San Diego County.
<b>Number of Survey Participants</b>	324 retail businesses in San Diego County and Southern California 67 current and former retail employees in San Diego County
<b>Survey Field Dates</b>	Web & telephone employer survey: July 6 – August 1, 2016 Web survey of current and former retail employees: July 19 – July 29, 2016
<b>Survey Universe</b>	14,880 establishments in San Diego County
<b>Survey Margin of Error</b>	The margin of error for questions answered by all 324 retail businesses was +/- 5.39 at the 95 percent level of confidence

### Survey Design

Through an iterative process, BW Research worked closely with the San Diego Workforce Partnership to develop a survey instrument that met the research objectives of the study. In developing the survey instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey.

#### Sampling Method

A clustered (by 3-digit NAICS) database of 6,111 San Diego firms in the retail industry was developed for phone collection. Phone collection was supplemented by web panel participants that were required to provide confirmation at various Retail related screener questions (industry sub-segment, etc.) in order to take the survey. For some employer surveys, the sampling was expanded to Southern California (San Diego County, Imperial County, Orange County, Riverside County, and Los Angeles County).

For the web survey (Ethnography) of current and former retail employees, a web panel was utilized. The participants were required to provide valid San Diego County zip codes and information related to current or former retail employment.

## Occupational Categories

### *Customer-facing Positions*

Customer-facing occupations account for just over half of all retail occupations. Individuals in these positions typically have a high school diploma, with the exception of sales representatives. Because of this, the majority of these occupations make under \$50,000 a year, again with the exception of sales representatives. The average wage across these occupations is about \$38,000 a year, and they comprise about just over 60 percent of total demand over the next five years. This occupational group includes specific occupations such as; retail salespersons, cashiers, customer service representatives, combined food preparation and serving workers (including fast food), etc.

### *Back-office Support*

Back-office support workers comprise two in ten retail workers. These employees average around \$37,000 a year and have a high school diploma or less. Pharmacists, however, represent an outlier; these individuals often possess a professional or doctorate degree and earn roughly \$127,100 per year. Back-office support will account for 19 percent of total growth demand over the next five years.<sup>47</sup> This occupational group includes the following specific occupations; stock clerks and order fillers, laborers and freight, stock, and material movers (hand), automotive service technicians and mechanics, office clerks (general), etc.

### *Front-line Supervisors*

Front-line supervisors account for just under eight percent of all retail workers and two percent of five-year growth demand. These workers typically have a high school education, with the exception of those who manage office and administrative support workers. The average wage for supervisors is just under \$53,000 a year. This occupational category includes front-line supervisors of retail sales workers and front-line supervisors of office and administrative support workers.

### *General and Operations Managers*

Managers are the highest paid retail workers; they comprise about two percent of the retail workforce and just under two percent of total growth demand over the next five years. These workers typically possess a Bachelor's degree and make over \$120,000 a year on average.

## Data Collection

Prior to beginning data collection, BW Research conducted interviewer training and also pre-tested the survey instruments to ensure that all words and questions were easily understood by the respondents. The overall data collection period was July 19<sup>th</sup> through August 1st, 2016.

## A Note about Margin of Error

The overall margin of error for the surveys, at the 95 percent level of confidence, is +/- 5.39 percent for questions answered by all 324 Life Science firms.

---

<sup>47</sup> The average annual wage excluding pharmacists is about \$30,000 per year.





## APPENDIX B – EMPLOYER TOPLINES



SDWP

Retail

August 2016

Preliminary Toplines (Overall n=324)

(Occupational n=1,053)

### Introduction:

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of the San Diego Workforce Partnership who would value your participation in a brief survey about the region's retail workforce.

(If needed): The study should take approximately 15 minutes of your time. By answering these questions, you can help regional planners understand what types of investments should be made in training your current and future employees.

(If needed): This survey is being conducted by BW Research, an independent research organization.

(If needed): Your individual responses will not be published; only aggregate information will be used in the reporting of the study results.

### Screening Questions

A. Is your firm in the retail industry? (i.e., does your firm sell merchandise or other goods directly to consumers, including food?)

100.0 % Yes [CONTINUE]

0.0 % No [TERMINATE]

B. Does your firm have employees located in San Diego County?

100.0 % Yes [CONTINUE]

0.0 % No [TERMINATE]



C. Do you feel comfortable answering questions about the hiring and staffing needs of your San Diego County locations?

100.0 % Yes [CONTINUE]

0.0 % No [TERMINATE]

D. Which of the following industry categories best describes what your firm is involved in? (WAIT FOR RESPONSE AND TRY AND FIT IT INTO ONE – CONFIRM WITH RESPONDENT)

- 15.4 % Clothing and Clothing Accessory Stores
- 14.2 % Food and Beverage Stores, including Grocery Stores and Supermarkets
- 14.2 % Restaurants, including Fast Food
- 6.8 % General Merchandise Stores
- 6.5 % Health and Personal Care Stores, including Pharmacies
- 5.9 % Building Materials or Garden Supply Store, including Home Centers and Hardware Stores
- 5.6 % Breweries
- 4.6 % Electronics or Appliance Stores
- 4.6 % Sporting Goods, Hobby, Musical Instruments and Book Stores
- 4.3 % E-commerce or Online/Electronic Shopping
- 4.0 % Department Stores and Warehouse Clubs and Supercenters
- 3.4 % Furniture or Home Furnishings
- 2.8 % Motor Vehicles or Parts Dealers
- 2.5 % Gas Stations
- 5.2 % Other

E. For this survey, we are using occupational titles that may differ from the specific position titles used in your organization. Please try to equate your organization's specific position titles with the more general ones we will use here.

Do you have employees located in San Diego County that fit the following occupational titles? [Select all that apply]

Yes

No

A. Customer-facing positions	92.9 %	7.1 %
B. Back-office support	77.2 %	22.8 %
C. Front-line management	85.5 %	14.5 %
D. General and operations managers	92.3 %	7.7 %

IF YES TO AT LEAST ONE OCCUPATIONAL GROUP [CONTINUE]  
 NO TO ALL OCCUPATIONAL GROUPS [TERMINATE]

[OCCUPATIONS OFFERED WILL INITIALLY BE BASED ON RESPONSE AND  
 WILL CHANGE AS OCCUPATIONAL QUOTAS ARE FILLED]

### SECTION 1 - Organization-Related Questions

The survey will begin by asking you a few general questions about the employees at your San Diego County locations.

1. Including all full-time and part-time employees, how many permanent, temporary, and contract employees does your firm have in San Diego County?

- 13.3 % Less than 10
- 17.5 % Between 10 and 24
- 28.2 % Between 25 and 99
- 39.9 % 100 or more
- 1.0 % (DON'T READ) DK/NA

2. If you currently have [TAKE Q1 #] full-time and part-time permanent, temporary, and contract employees in San Diego County, how many more or how many fewer employees do you expect to have in the county 12 months from now?

(Please enter the number more or the number less. For example, if you currently have 20 employees and expect to have 3 more 12 months from now, you would enter 3 next to more.)

Breakdown:

- 40.7 % More
- 3.7 % Fewer
- 48.8 % Same number of permanent employees
- 6.8 % (DON'T READ) DK/NA

Expected Permanent Employment in 12 months

(Calculated by only examining businesses with both current and projected data)

	<u>Current</u>	<u>12 months</u>
n	266	266
Mean	198.05	211.32
Median	45.00	47.50
Total Employees	52,682	56,212
Change		3,530

---

% Growth

6.7 %

[If amount differs by 10 % or more in either direction, ask: ]

Just to confirm, you currently have \_\_\_\_ employees and you expect to have \_\_\_\_ (more/fewer) employees, for a total of \_\_\_\_ employees 12 months from now.

## SECTION 2 - Occupational Growth

3. Now we want to ask you more specific questions about some of the occupations you indicated you have at your San Diego County locations. Is [INSERT OCCUPATION] more likely to be a part-time or a full-time position? [IF YES TO MORE THAN 4 OCCUPATIONS IN SD - TAKE TOP 2 BASED ON PRIORITY CODE]

	<u>Full-time</u>	<u>Part-time</u>	<u>Both</u>	(DON'T READ) DK/NA
A. Customer-facing positions (n=276)	34.8 %	33.3 %	29.0 %	2.9 %
B. Back-office support (n=244)	51.2 %	23.4 %	22.1 %	3.3 %
C. Front-line management (n=253)	72.3 %	11.5 %	11.5 %	4.7 %
D. General and operations managers (n=280)	70.7 %	11.4 %	12.5 %	5.4 %

15. Thinking of your management and professional positions, how often do you promote from within?

48.1 % Frequently  
 45.7 % Sometimes  
 3.1 % Never  
 3.1 % (DON'T READ) DK/NA

16. Do you require or prefer your workers to obtain a bachelor's degree prior to promotion to management or professional positions?

42.3 % Prefer  
 13.3 % Require  
 42.3 % Neither prefer nor require  
 2.2 % (DON'T READ) DK/NA

17. Does your firm provide any of the following to your existing retail workers?  
[ALLOW MULTIPLE RESPONSES] (Multiple responses permitted,  
percentages may sum to more than 100 %)

- 69.8 % Flexible work schedules for training or education
- 61.4 % Company/corporate management training
- 40.4 % Formal professional development activities
- 27.2 % Tuition reimbursement
- 6.2 % None of the above
- 2.5 % (DON'T READ) DK/NA

18. Aside from formal education and training, what are the three most important characteristics, skills, or attributes you look for when considering promoting an existing worker to a management or professional position?  
[ALLOW MULTIPLE RESPONSES] (Multiple responses permitted,  
percentages may sum to more than 100 %)

- 58.0 % Work ethic
- 35.5 % Skilled/knowledgeable in profession
- 21.3 % Customer service skills
- 20.7 % Ambition
- 15.7 % Attitude
- 13.3 % Personality
- 10.5 % Experience
- 10.2 % Leadership skills
- 7.4 % Professionalism
- 1.2 % Background
- 3.1 % None
- 6.5 % Other – *no single category more than 2 responses*
- 4.0 % Don't know/ Refused

19. Which job titles are most likely to be filled by internal promotion? [ALLOW MULTIPLE RESPONSES] (Multiple responses permitted, %ages may sum to more than 100 %)

- 60.2 % Managers, coordinators, supervisors, directors
- 28.7 % Support staff
- 15.4 % Shift leaders
- 3.7 % None
- 10.2 % Other
- 5.2 % Don't know/ Refused

20. How difficult do you expect it will be to recruit and retain employees at your firm over the next two years?

- 5.9 % Very difficult
- 43.5 % Somewhat difficult
- 47.2 % Not at all difficult
- 3.4 % (DON'T READ) DK/NA

21. Is your company interested in finding out more about any of the following San Diego Workforce Partnership (SDWP) free programs? [ALLOW MULTIPLE RESPONSES] (Multiple responses permitted, percentages may sum to more than 100 %)

- 28.1 % Recruitment assistance for current job openings
- 26.2 % Funds to train current workers to be promoted within the company
- 24.7 % Funds to reimburse wages or the cost of training new hires
- 18.2 % Sourcing and pre-screening for interns
- Development of an apprenticeship-type program for your company's future employees
- 16.0 %
- 46.0 % (DON'T READ) DK/NA

22. Are you interested in receiving the findings of this research or other communication from SDWP?

- 34.9 % Yes
- 54.9 % No
- 10.2 % (DON'T READ) DK/NA

### CUSTOMER-FACING POSITIONS (n=276)

4. How many individuals do you have in San Diego County that are employed in Customer-facing positions?

- 24.4 % Less than 10
- 25.4 % Between 10 and 24
- 20.6 % Between 25 and 99
- 28.2 % 100 or more
- 1.4 % (DON'T READ) DK/NA

5. If you currently have [INSERT Q #] Customer-facing positions employed in San Diego County, how many more or how many fewer Customer-facing positions do you expect to have at your location 12 months from now?

Breakdown:

- 33.3 % More
- 2.5 % Fewer
- 56.5 % Same number of permanent employees
- 7.6 % (DON'T READ) DK/NA

Expected Permanent Employment in 12 months  
(Calculated by only examining businesses with both current and projected data)

	<u>Current</u>	<u>12 months</u>
n	189	189
Mean	119.02	125.87
Median	20.00	24.00



Total Employees	22,494	23,790
Change		1,296
% Growth		5.8%

### SECTION 3 - Occupational Demand, Education and Experience

Next I want to ask about your experience and hiring expectations with these Customer-facing positions.

6. Please indicate the importance of the following elements when considering applicants for Customer-facing positions within your organization.

	Very <u>important</u>	Somewhat <u>important</u>	Not at all <u>important</u>	(DON'T READ) <u>DK/NA</u>
A. Relevant work experience	58.3 %	34.4 %	6.5 %	0.7 %
B. Basic mathematics	54.0 %	40.2 %	4.3 %	1.4 %
C. Basic command of English	77.9 %	18.5 %	2.9 %	0.7 %
D. Bilingual	20.3 %	53.3 %	24.3 %	2.2 %
E. Advanced communication, beyond basic English	36.2 %	44.6 %	17.0 %	2.2 %
F. Customer service skills	81.5 %	15.2 %	2.2 %	1.1 %
G. Problem solving and/or analytical ability	63.4 %	31.2 %	3.6 %	1.8 %
H. Attitude, work ethic, timeliness, workplace demeanor	87.3 %	10.1 %	1.4 %	1.1 %

7. Please indicate whether your San Diego California locations have any *difficulty finding qualified applicants* for Customer-facing positions who meet the organization's hiring standards for any of the following categories:

	Very <u>difficult</u>	Somewhat <u>difficult</u>	Not at all <u>difficult</u>	(DON'T READ) <u>DK/NA</u>
A. Relevant work experience	15.2 %	37.0 %	46.0 %	1.8 %
B. Basic mathematics	10.9 %	29.3 %	57.2 %	2.5 %
C. Basic command of English	13.0 %	19.6 %	65.6 %	1.8 %
D. Bilingual	12.3 %	42.8 %	39.5 %	5.4 %
E. Advanced communication, beyond basic English	18.8 %	37.7 %	40.9 %	2.5 %
F. Customer service skills	15.6 %	38.0 %	44.6 %	1.8 %
G. Problem solving and/or analytical ability	18.5 %	42.4 %	37.0 %	2.2 %
H. Attitude, work ethic, timeliness, workplace demeanor	23.6 %	37.3 %	36.6 %	2.5 %

8. Now, we'd like to know the *typical education requirements* for successful applicants within Customer-facing positions at your San Diego locations.

- 63.4 % Completion of high school or equivalent
- 15.6 % Some college, but not a degree
- 8.3 % Certificate or associate degree from a community college
- 9.8 % Bachelor's degree (B.A., B.S.)
- 0.4 % Masters or other graduate degree (M.A., MBA, M.S., Ph.D., J.D.)
- 2.5 % (DON'T READ) DK/NA

If Q8 = "Some college, but not a degree"; ASK Q9, OTHERWISE SKIP

9. Are there any specific training programs or placement agencies that you prefer for sourcing candidates for Customer-facing positions? (n=43)

- 9 % Education, work experience, interpersonal skills, references, etc.
- 7 % Temp/staffing agencies (Labor Ready, Manpower, Keystone, Appleone, HireCorp, etc.)
- 5 % Customer service training
- 2 % Online job agencies (Monster, Indeed, etc.)

- 5 % Other
- 58 % None
- 14 % Don't know/ Refused

10. Next, we'd like to know the *typical level of work experience* you expect for successful applicants within Customer-facing positions for your San Diego locations.

- 28.6 % No formal work experience required
- 42.8 % Six months to two years in a related position
- 11.2 % More than two years in a related position
- 10.1 % Six months to two years in that specific position
- 4.0 % More than two years in that specific position
- 3.3 % (DON'T READ) DK/NA

11. For new hires in Customer-facing positions, does your firm require a background check?

- 69.9 % Yes
- 26.4 % No
- 3.6 % (DON'T READ) DK/NA

12. Thinking of Customer-facing positions at your firm, are there physical requirements of the job (IF NEEDED: walking significant distances, lifting heavy items, etc.)?

- 61.6 % Yes
- 35.5 % No
- 2.9 % (DON'T READ) DK/NA

13. Thinking of Customer-facing positions, does your firm use any work assessments, evaluations, personality tests, or other screening tools prior to hiring applicants or for promotion?

- 31.2 % Yes, for new hires only
- 11.6 % Yes, for promotion or advancement only
- 29.7 % Yes, for both new hires and promotion

- 24.3 % No
- 3.3 % (DON'T READ) DK/NA

If 13 = "Yes" ask Q14 otherwise SKIP

14. Which assessments and screening tools does your organization most typically use? (n=200)

- 25.0 % Pre-employment screening
- 18.0 % Job duty specific tests/assessments (ICIMS, NPMS, product knowledge, predictive index, criteria corp, etc.)
- 8.5 % Personality test
- 7.5 % Background check
- 6.5 % On the job evals (3 month, 6 month, etc.) and training
- 6.0 % Skills test
- 3.5 % Psychological testing (Myers-Briggs, etc.)/ aptitude
- 2.5 % Drug test
- 6.5 % None
- 4.0 % Other
- 12.0 % Don't know/ Refused

## BACK OFFICE SUPPORT (n=244)

4. How many individuals do you have in San Diego, California that are employed in Back office support?

- 43.6 % Less than 10
- 20.5 % Between 10 and 24
- 21.0 % Between 25 and 99
- 13.8 % 100 or more
- 1.0 % (DON'T READ) DK/NA

5. If you currently have [INSERT Q #] Back office support employed in San Diego County, how many more or how many fewer Back office support do you expect to have at your location 12 months from now?

Breakdown:

- 27.0 % More
- 4.9 % Fewer
- 62.3 % Same number of permanent employees
- 5.7 % (DON'T READ) DK/NA

Expected Permanent Employment in 12 months

(Calculated by only examining businesses with both current and projected data)

	<u>Current</u>	<u>12 months</u>
n	178	178
Mean	42.34	44.79
Median	10.00	10.00
Total Employees	7,536	7,973
Change		437
<hr/> % Growth		5.8%

### SECTION 3 - Occupational Demand, Education and Experience

Next I want to ask about your experience and hiring expectations with these Back office support.

6. Please indicate the importance of the following elements when considering applicants for Back office support within your organization.

	Very <u>important</u>	Somewhat <u>important</u>	Not at all <u>important</u>	(DON'T READ) <u>DK/NA</u>
A. Relevant work experience	66.0 %	29.1 %	3.7 %	1.2 %
B. Basic mathematics	64.3 %	29.9 %	3.7 %	2.0 %
C. Basic command of English	69.3 %	25.8 %	3.7 %	1.2 %
D. Bilingual	24.6 %	45.9 %	26.6 %	2.9 %
E. Advanced communication, beyond basic English	40.2 %	40.2 %	17.6 %	2.0 %
F. Customer service skills	54.9 %	31.1 %	12.3 %	1.6 %
G. Problem solving and/or analytical ability	73.4 %	21.7 %	3.3 %	1.6 %
H. Attitude, work ethic, timeliness, workplace demeanor	77.5 %	17.6 %	2.9 %	2.0 %

7. Please indicate whether your San Diego County locations have any *difficulty finding qualified applicants* for Back office support who meet the organization's hiring standards for any of the following categories:

	Very <u>difficult</u>	Somewhat <u>difficult</u>	Not at all <u>difficult</u>	(DON'T READ) <u>DK/NA</u>
A. Relevant work experience	19.7 %	35.2 %	43.4 %	1.6 %
B. Basic mathematics	14.3 %	29.9 %	53.3 %	2.5 %
C. Basic command of English	13.1 %	21.3 %	63.9 %	1.6 %
D. Bilingual	12.3 %	38.5 %	45.1 %	4.1 %
E. Advanced communication, beyond basic English	18.0 %	33.6 %	45.9 %	2.5 %
F. Customer service skills	14.3 %	34.4 %	48.8 %	2.5 %
G. Problem solving and/or analytical ability	22.1 %	39.3 %	36.1 %	2.5 %
H. Attitude, work ethic, timeliness, workplace demeanor	20.9 %	36.5 %	40.6 %	2.0 %

8. Now, we'd like to know the *typical education requirements* for successful applicants within Back office support at your San Diego County locations.

- 38.9 % Completion of high school or equivalent
- 26.6 % Some college, but not a degree
- 20.9 % Certificate or associate degree from a community college
- 11.1 % Bachelor's degree (B.A., B.S.)
- 0.4 % Masters or other graduate degree (M.A., MBA, M.S., Ph.D., J.D.)
- 2.0 % (DON'T READ) DK/NA

If Q8 = "Some college, but not a degree"; ASK Q9, OTHERWISE SKIP

9. Are there any specific training programs or placement agencies that you prefer for sourcing candidates for Back office support? (n=64)

- 9 % Temp/staffing agencies (Labor Ready, Manpower, Keystone, Appleone, HireCorp, etc.)
- 9 % Office skills training
- 8 % Education, work experience, interpersonal skills, references, etc.
- 6 % Online job agencies (Monster, Indeed, etc.)
- 3 % Other
- 2 % Management training program
- 47 % None
- 16 % Don't know/ Refused

10. Next, we'd like to know the *typical level of work experience* you expect for successful applicants within Back office support for your San Diego County locations.

- 28.6 % No formal work experience required
- 42.8 % Six months to two years in a related position
- 11.2 % More than two years in a related position
- 10.1 % Six months to two years in that specific position
- 4.0 % More than two years in that specific position
- 3.3 % (DON'T READ) DK/NA

11. For new hires in Back office support, does your firm require a background check?

81.6 % Yes  
17.6 % No  
0.8 % (DON'T READ) DK/NA

12. Thinking of Back office support at your firm, are there physical requirements of the job (IF NEEDED: walking significant distances, lifting heavy items, etc.)?

56.6 % Yes  
41.0 % No  
2.5 % (DON'T READ) DK/NA

13. Thinking of Back office support, does your firm use any work assessments, evaluations, personality tests, or other screening tools prior to hiring applicants or for promotion?

24.6 % Yes, for new hires only  
20.5 % Yes, for promotion or advancement only  
32.4 % Yes, for both new hires and promotion  
20.1 % No  
2.5 % (DON'T READ) DK/NA

If 13 = "Yes" ask Q14 otherwise SKIP

14. Which assessments and screening tools does your organization most typically use? (n=189)

22.8 % Job duty specific tests/assessments (ICIMS, NPMS, product knowledge, predictive index, criteria corp, etc.)  
19.0 % Pre-employment screening  
8.5 % On the job evals (3 month, 6 month, etc.) and training  
7.9 % Background check  
6.3 % Skills test  
5.3 % Personality test



3.7 %	Psychological testing (Myers-Briggs, etc.)/ aptitude
2.1 %	Drug test
6.9 %	None
3.7 %	Other
13.8 %	Don't know/ Refused

### Front-LINE MANAGEMENT (n=253)

4. How many individuals do you have in San Diego County that are employed in Front-line management?

46.2 %	Less than 10
24.6 %	Between 10 and 24
18.5 %	Between 25 and 99
9.2 %	100 or more
1.5 %	(DON'T READ) DK/NA

5. If you currently have [INSERT Q #] Front-line management employed in San Diego, how many more or how many fewer Front-line management do you expect to have at your location 12 months from now?

Breakdown:

28.9 %	More
6.3 %	Fewer
58.1 %	Same number of permanent employees
6.7 %	(DON'T READ) DK/NA

Expected Permanent Employment in 12 months  
(Calculated by only examining businesses with both current and projected data)

	<u>Current</u>	<u>12 months</u>
n	176	176
Mean	26.90	29.55

Median	9.50	10.00
Total Employees	4,735	5,200
Change		465
% Growth		9.8%

### SECTION 3 - Occupational Demand, Education and Experience

Next I want to ask about your experience and hiring expectations with Front-line management.

6. Please indicate the importance of the following elements when considering applicants for Front-line management within your organization.

	Very important	Somewhat important	Not at all important	(DON'T READ) DK/NA
A. Relevant work experience	74.7 %	20.2 %	3.6 %	1.6 %
B. Basic mathematics	66.4 %	28.9 %	2.4 %	2.4 %
C. Basic command of English	74.3 %	19.8 %	4.7 %	1.2 %
D. Bilingual	30.4 %	42.7 %	23.7 %	3.2 %
E. Advanced communication, beyond basic English	55.3 %	30.8 %	11.5 %	2.4 %
F. Customer service skills	76.7 %	16.6 %	4.7 %	2.0 %
G. Problem solving and/or analytical ability	77.9 %	16.6 %	4.0 %	1.6 %
H. Attitude, work ethic, timeliness, workplace demeanor	84.6 %	9.5 %	4.7 %	1.2 %

7. Please indicate whether your San Diego locations have any *difficulty finding qualified applicants* for Front-line management who meet the organization's hiring standards for any of the following categories:

	Very difficult	Somewhat difficult	Not at all difficult	(DON'T READ) DK/NA
A. Relevant work experience	21.3 %	42.3 %	34.8 %	1.6 %
B. Basic mathematics	11.9 %	31.6 %	54.9 %	1.6 %
C. Basic command of English	13.8 %	22.1 %	62.8 %	1.2 %
D. Bilingual	11.1 %	42.3 %	42.3 %	4.3 %
E. Advanced communication, beyond basic English	15.0 %	34.8 %	47.0 %	3.2 %
F. Customer service skills	13.8 %	34.0 %	50.2 %	2.0 %
G. Problem solving and/or analytical ability	15.0 %	40.3 %	41.9 %	2.8 %
H. Attitude, work ethic, timeliness, workplace demeanor	18.2 %	34.0 %	45.8 %	2.0 %

8. Now, we'd like to know the *typical education requirements* for successful applicants within Front-line management at your San Diego County locations.

- 23.7 % Completion of high school or equivalent
- 23.3 % Some college, but not a degree
- 22.5 % Certificate or associate degree from a community college
- 24.1 % Bachelor's degree (B.A., B.S.)
- 3.2 % Masters or other graduate degree (M.A., MBA, M.S., Ph.D., J.D.)
- 3.2 % (DON'T READ) DK/NA

If Q8 = "Some college, but not a degree"; ASK Q9, OTHERWISE SKIP

9. Are there any specific training programs or placement agencies that you prefer for sourcing candidates for Front-line management? (n=59)

- 7 % Education, work experience, interpersonal skills, references, etc.
- 3 % Online job agencies (Monster, Indeed, etc.)
- 8 % Temp/staffing agencies (Labor Ready, Manpower, Keystone, Appleone, HireCorp, etc.)
- 7 % Management training program
- 5 % Office skills training
- 2 % Customer service training

- 10 % Other
- 44 % None
- 14 % Don't know/ Refused

10. Next, we'd like to know the *typical level of work experience* you expect for successful applicants within Front-line management for your San Diego County locations.

- 3.2 % No formal work experience required
- 25.3 % Six months to two years in a related position
- 39.9 % More than two years in a related position
- 15.4 % Six months to two years in that specific position
- 14.2 % More than two years in that specific position
- 2.0 % (DON'T READ) DK/NA

11. For new hires in Front-line management, does your firm require a background check?

- 81.8 % Yes
- 16.2 % No
- 2.0 % (DON'T READ) DK/NA

12. Thinking of Front-line management at your firm, are there physical requirements of the job (IF NEEDED: walking significant distances, lifting heavy items, etc.)?

- 53.4 % Yes
- 44.3 % No
- 2.4 % (DON'T READ) DK/NA

13. Thinking of Front-line management, does your firm use any work assessments, evaluations, personality tests, or other screening tools prior to hiring applicants or for promotion?

- 23.7 % Yes, for new hires only
- 16.6 % Yes, for promotion or advancement only
- 36.8 % Yes, for both new hires and promotion
- 18.6 % No
- 4.3 % (DON'T READ) DK/NA

If 13 = "Yes" ask Q14 otherwise SKIP

14. Which assessments and screening tools does your organization most typically use? (n=194)

- 28.9 % Pre-employment screening
- 16.0 % Job duty specific tests/assessments (ICIMS, NPMS, product knowledge, predictive index, criteria corp, etc.)
- 6.7 % On the job evals (3 month, 6 month, etc.) and training
- 6.2 % Background check
- 5.7 % Personality test
- 4.6 % Skills test
- 2.6 % Drug test

- 2.6 % Psychological testing (Myers-Briggs, etc.)/ aptitude
- 7.2 % None
- 5.7 % Other
- 13.9 % Don't know/ Refused

#### GENERAL AND OPERATIONS MANAGEMENT (n=280)

4. How many individuals do you have in San Diego County that are employed in General and operations management?

- 53.2 % Less than 10
- 20.4 % Between 10 and 24
- 18.5 % Between 25 and 99

6.9 % 100 or more  
 0.9 % (DON'T READ) DK/NA

5. If you currently have [INSERT Q #] General and operations management employed in San Diego County, how many more or how many fewer General and operations management do you expect to have at your location 12 months from now?

Breakdown:

24.6 % More  
 4.6 % Fewer  
 64.6 % Same number of permanent employees  
 6.1 % (DON'T READ) DK/NA

Expected Permanent Employment in 12 months  
 (Calculated by only examining businesses with both current and projected data)

	<u>Current</u>	<u>12 months</u>
n	197	197
Mean	21.17	22.63
Median	5.00	5.00
Total Employees	4,170	4,458
Change		288
% Growth		6.9%

### SECTION 3 - Occupational Demand, Education and Experience

Next I want to ask about your experience and hiring expectations with Front-line management.

6. Please indicate the importance of the following elements when considering applicants for General and operations management within your organization.

	Very <u>important</u>	Somewhat <u>important</u>	Not at all <u>important</u>	(DON'T READ) DK/NA
A. Relevant work experience	78.6 %	15.0 %	4.3 %	2.1 %
B. Basic mathematics	70.4 %	21.4 %	5.4 %	2.9 %
C. Basic command of English	76.8 %	15.0 %	5.0 %	3.2 %
D. Bilingual	37.1 %	37.5 %	22.1 %	3.2 %
E. Advanced communication, beyond basic English	63.2 %	23.6 %	9.6 %	3.6 %
F. Customer service skills	78.2 %	12.9 %	6.4 %	2.5 %
G. Problem solving and/or analytical ability	76.4 %	15.7 %	5.4 %	2.5 %
H. Attitude, work ethic, timeliness, workplace demeanor	83.2 %	10.7 %	3.6 %	2.5 %

7. Please indicate whether your San Diego County locations have any *difficulty finding qualified applicants* for General and operations management who meet the organization's hiring standards for any of the following categories:

	Very <u>difficult</u>	Somewhat <u>difficult</u>	Not at all <u>difficult</u>	(DON'T READ) DK/NA
A. Relevant work experience	22.9 %	40.4 %	33.6 %	3.2 %
B. Basic mathematics	13.2 %	24.3 %	58.9 %	3.6 %
C. Basic command of English	13.9 %	20.0 %	62.5 %	3.6 %
D. Bilingual	12.5 %	34.3 %	47.1 %	6.1 %
E. Advanced communication, beyond basic English	15.7 %	36.8 %	40.4 %	7.1 %
F. Customer service skills	13.2 %	35.7 %	47.9 %	3.2 %
G. Problem solving and/or analytical ability	17.9 %	36.1 %	42.1 %	3.9 %
H. Attitude, work ethic, timeliness, workplace demeanor	18.6 %	28.9 %	49.3 %	3.2 %

8. Now, we'd like to know the *typical education requirements* for successful applicants within General and operations management at your San Diego County locations.

18.9 % Completion of high school or equivalent



- 14.3 % Some college, but not a degree
- 17.9 % Certificate or associate degree from a community college
- 36.4 % Bachelor's degree (B.A., B.S.)
- 9.6 % Masters or other graduate degree (M.A., MBA, M.S., Ph.D., J.D.)
- 2.9 % (DON'T READ) DK/NA

If Q8 = "Some college, but not a degree"; ASK Q9, OTHERWISE SKIP

9. Are there any specific training programs or placement agencies that you prefer for sourcing candidates for General and operations management?

- 5 % Education, work experience, interpersonal skills, references, etc.
- 5 % Temp/staffing agencies (Labor Ready, Manpower, Keystone, Appleone, HireCorp, etc.)
- 3 % Online job agencies (Monster, Indeed, etc.)
- 3 % Management training program
- 3 % Other
- 75 % None
- 8 % Don't know/ Refused

10. Next, we'd like to know the *typical level of work experience* you expect for successful applicants within General and operations management for your San Diego County locations.

- 2.1 % No formal work experience required
- 14.3 % Six months to two years in a related position
- 31.8 % More than two years in a related position
- 18.6 % Six months to two years in that specific position
- 30.7 % More than two years in that specific position
- 2.5 % (DON'T READ) DK/NA

11. For new hires in General and operations management, does your firm require a background check?

- 83.6 % Yes
- 13.9 % No
- 2.5 % (DON'T READ) DK/NA

12. Thinking of General and operations management at your firm, are there physical requirements of the job (IF NEEDED: walking significant distances, lifting heavy items, etc.)?

- 52.9 % Yes
- 44.3 % No
- 2.9 % (DON'T READ) DK/NA

13. Thinking of General and operations management, does your firm use any work assessments, evaluations, personality tests, or other screening tools prior to hiring applicants or for promotion?

- 20.4 % Yes, for new hires only
- 15.0 % Yes, for promotion or advancement only
- 38.6 % Yes, for both new hires and promotion
- 20.7 % No
- 5.4 % (DON'T READ) DK/NA

If 13 = "Yes" ask Q14 otherwise SKIP

14. Which assessments and screening tools does your organization most typically use? (n=206)

- 29.6 % Pre-employment screening
- 16.0 % Job duty specific tests/assessments (ICIMS, NPMS, product knowledge, predictive index, criteria corp, etc.)
- 7.3 % Background check
- 6.8 % Personality test
- 6.3 % On the job evals (3 month, 6 month, etc.) and training
- 4.9 % Skills test
- 2.4 % Psychological testing (Myers-Briggs, etc.)/ aptitude

- 1.5 % Drug test
- 7.3 % None
- 4.4 % Other
- 13.6 % Don't know/ Refused

Please provide your contact information:

First and Last Name of Respondent\_\_\_\_\_

Position of Respondent\_\_\_\_\_

Name of Organization\_\_\_\_\_

Phone of Respondent\_\_\_\_\_

Email of Respondent\_\_\_\_\_

Address of Organization (including city)\_\_\_\_\_

Thank you very much for your time.

Date and Time of Survey \_\_\_\_\_

Primary SIC\_\_\_\_\_

## APPENDIX C – EMPLOYEE ETHNOGRAPHY TOPLINES



SDWP

Retail

August 2016

Ethnography Preliminary Toplines (n=67)

Introduction:

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of the San Diego Workforce Partnership who would value your participation in a brief study about your career.

(If needed): This study is being conducted by BW Research, an independent research organization.

(If needed): Your individual responses will not be published; only aggregate information will be used in the reporting of the study results.

Screening Questions

F. Do you currently or have you previously worked in the retail industry? (i.e., at a company that sells merchandise or other goods directly to consumers, including food?)

58 % Yes, I currently work in retail [CONTINUE]

42 % Yes, I previously worked in retail [CONTINUE]

0 % No [TERMINATE]

IF SA = "Yes, I currently work in retail" ASK SB, OTHERWISE SKIP

G. Which of the following categories best describes your current employer?  
(INCLUDE LIST) (n=39)

- 21 % Clothing and Clothing Accessory Stores
- 15 % E-commerce or Online/Electronic Shopping
- 13 % Food and Beverage Stores, including Grocery Stores and Supermarkets  
Building Materials or Garden Supply Store, including Home Centers and Hardware  
Stores
- 10 % Stores
- 8 % General Merchandise Stores
- 5 % Motor Vehicles or Parts Dealers
- 5 % Health and Personal Care Stores, including Pharmacies
- 5 % Gas Stations
- 5 % Department Stores and Warehouse Clubs and Supercenters
- 3 % Electronics or Appliance Stores
- 3 % Sporting Goods, Hobby, Musical Instruments and Book Stores
- 8 % Other

IF SA= "Yes, I previously worked in retail" ASK SC, OTHERWISE SKIP

H. Which of the following categories best describes your employer's current  
industry? (n=28)

- 21 % Educational services
- 11 % Wholesale trade
- 11 % Professional, scientific, and technical services
- 7 % Health care and social assistance
- 7 % Arts, entertainment, and recreation
- 4 % Agriculture, including farming, forestry, and fisheries
- 4 % Utilities
- 4 % Construction

- 4 % Manufacturing
- 4 % Finance and insurance
- 4 % Real estate, including sales, rentals, and leasing
- 21 % Other

## SECTION 1 – Current Occupation

The survey will begin by asking you a few general questions about your current position.

### 1. What is your current title?

- 46 % Professional, technical, and managerial occupations
- 33 % Clerical and sales occupations
- 6 % Service occupations
- 15 % Other

### 2. How long have you held this specific position?

- 12 % Less than 1 year
- 18 % 1 year to less than 2 years
- 24 % 2 years to less than 5 years
- 27 % 5 years to less than 10 years
- 19 % 10 years or more

### 3. How long have you worked with your current employer/company?

- 13 % Less than 1 year
- 15 % 1 year to less than 2 years
- 21 % 2 years to less than 5 years
- 22 % 5 years to less than 10 years
- 28 % 10 years or more

### 4. Do you currently manage or supervise staff in your current position?

- 48 % Yes
- 52 % No

5. What is the highest grade or level of school that you have completed?

- 1 % Some high school, but did not graduate
- 7 % High school graduate
- 42 % Some college but no degree or certificate
- 1 % Post-secondary certificate from an accredited program
- 9 % Associate degree
- 36 % Bachelor's degree
- 3 % More than bachelor's degree

IF Q5="Associate degree", "Bachelor's degree", or "More than a bachelor's degree", ask Q6 otherwise SKIP

6. Which of the following best describes your degree or primary field of study? *(Please select only one response.)* (n=32)

- 41 % Business or Management
- 13 % Information Technology
- 9 % Medical, Health, Agriculture or Life Sciences
- 6 % Computer Science
- 3 % Education
- 3 % Engineering-Networking
- 3 % Non-technical field such as Humanities, Art, Architecture or Law
- 3 % Political Science
- 19 % Other

IF SA= "Yes, I currently work in retail", ASK Q7 and Q8, OTHERWISE SKIP

7. Which statement most accurately describes your career in retail?

- 41 % I have successfully moved up the career ladder and continue to grow in my position
- 13 % I have successfully moved between jobs with satisfying lateral moves but have not advanced in terms of pay or responsibility
- 15 % I have successfully advanced in terms of pay and responsibility, but not as quickly as I'd like
- 23 % I have not advanced successfully and feel stuck in my current position
- 8 % None of the above

8. Now we would like to ask you about some specific obstacles that you have faced in your career in retail. Please tell us if you agree, disagree, or neither agree or disagree with the following statements.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
A. My formal education or training helped me advance in my retail career	28 %	23 %	21 %	18 %	10 %
B. I have not been able to acquire enough new technology skills to advance in my career	8 %	18 %	33 %	18 %	23 %
C. I have had enough mentors along the way	18 %	26 %	28 %	18 %	10 %
D. I have not advanced as quickly as I would like in my career	13 %	49 %	23 %	10 %	5 %
E. I have been able to make the right connections with people that make hiring decisions	18 %	28 %	33 %	10 %	10 %

9. Please provide an example or anecdote of a situation in which you faced a career obstacle and developed a way of working around it to continue your career growth.



- 30 % Getting promoted/advancing career
- 19 % Coworker/supervisor/customer/client challenges
- 10 % Lacked education/skills and pursued/received training
- 9 % Change in job duties (responsibilities, a demotion, role, seasonal, change in schedule, etc.)
- 12 % Other
- 9 % None
- 10 % Don't know/ Refused

10. What factors do you believe contribute the most to helping you succeed in your career?

- 33 % Being driven (committed, goals, tenacious, etc.)
- 31 % Work ethic (hardworking, reliable, etc.)
- 21 % Skilled (experience, educated and continued education, etc.)
- 12 % Attitude (respectful, positivity, etc.)
- 9 % Personality or character
- 8 % Support from coworkers, supervisors, friends, and/or family
- 5 % Other
- 6 % None
- 6 % Don't know/ Refused

11. What did you learn from the retail industry that you believe contributes the most to helping you succeed in your career?

- 31 % Customer service
- 25 % Working as part of a team

- 16 % Patience
- 16 % Adaptability
- 5 % Good communication
- 5 % Positivity
- 5 % Knowledge of the industry
- 8 % Other
- 8 % None
- 3 % Don't know/ Refused

12. How valuable do you believe your work experience in retail in terms of preparing you for your current position?

- 55 % Very valuable
- 40 % Somewhat valuable
- 4 % Not at all valuable

13. Please describe the specific skills or attributes that you believe you have gained through your experience working in the retail industry.

- 39 % Customer service skills/people skills
- 21 % Job knowledge (handling money, product knowledge, etc.)
- 18 % Being adaptable
- 10 % Organizational skills/ time management
- 8 % Patience
- 8 % Communication skills
- 8 % Working as a team
- 6 % Multi-tasking skills
- 6 % Personality
- 9 % Other
- 3 % None
- 2 % Don't know/ Refused

14. Have you ever participated in a formal career mentoring program offered by your employer as a mentor?

- 10 % Yes, previously participated as a mentor
- 13 % Yes, currently participating as a mentor
- 75 % No, never participated
- 1 % Don't know/ Refused

15. Please select any of the following that you believe have been important in your successful career navigation (i.e., your ability to successfully advance to new jobs with increased pay and responsibilities) (Multiple responses permitted, %ages may sum to more than 100 %)

- 52 % Previous work experience
- 51 % Self-guided learning and experimenting
- 39 % On-the-job training at current employer
- 39 % Family/friends support and guidance
- 30 % In-person networking
- 27 % K-12 education
- 27 % Bachelor's degree

- 21 % Websites
- 16 % Technical certifications
- 13 % Associate degree
- 12 % Online learning communities of industry professionals
- 12 % Job boards such as Monster and Career Builder
- 10 % Informal mentorship
- 7 % LinkedIn
- 6 % Formal mentorship
- 4 % PhD
- 3 % Master's degree
- 7 % Don't know/ Refused

16. Please rate how important you believe the following activities are for your career advancement:

	<u>Very important</u>	<u>Somewhat important</u>	<u>Not at all important</u>
A. Networking (including formal and informal activities to meet people and expand professional connections)	55 %	37 %	7 %

B. Organizational Reading (including understanding company culture, workplace relationships, industry trends, and other organizational behaviors)	52 %	37 %	10 %
C. Self-Awareness (including taking formal assessments, taking a step back and evaluating your own career pathway, and determining your own strengths and desires)	67 %	27 %	6 %
D. Relationship Management (including maintaining personal connections, taking notes on contacts, demonstrating value in professional conversations, and being a good listener)	75 %	21 %	4 %
E. Mentorship (including formal and informal mentorship)	33 %	51 %	16 %

17. Please indicate the average number of hours each month that you devote to developing, practicing, and/or conducting each of the following activities (please enter 0 if none):

	No hours devoted	1 to 4 hours	5 to 9 hours	10 to 19 hours	20 or more hours
A. Networking (including formal and informal activities to meet people and expand professional connections)	27 %	40 %	15 %	10 %	7 %
B. Organizational Reading (including understanding company culture, workplace relationships, industry trends, and other organizational behaviors)	24 %	34 %	22 %	12 %	7 %
C. Self-Awareness (including taking formal assessments, taking a step back and evaluating your own career pathway, and determining your own strengths and desires)	19 %	40 %	12 %	18 %	10 %
D. Relationship Management (including maintaining personal connections, taking notes on contacts, demonstrating value in professional conversations, and being a good listener)	18 %	36 %	13 %	18 %	15 %
E. Mentorship (including formal and informal mentorship)	40 %	28 %	16 %	9 %	6 %

IF SA= "Yes, I currently work in retail" ask Q18, otherwise SKIP

18. Have you received any formal career training, such as management classes, from your retail employer?

23 % Yes

77 % No

19. What is your hourly wage at your current position?

3 % Less than \$10.00

42 % \$10.00 to \$14.99

16 % \$15.00 to \$19.99

16 % \$20.00 to \$24.99

19 % \$25.00 or more

3 % Don't know/ Refused

Please enter your contact information below:

First and Last Name of Respondent \_\_\_\_\_

Position of Respondent \_\_\_\_\_

Email of Respondent \_\_\_\_\_

Thank you very much for your time.

A. Date and Time of Survey \_\_\_\_\_

## APPENDIX D – RETAIL OCCUPATIONS

	<b>SOC Code</b>	<b>Title</b>
<b>Customer-facing Positions</b>	41-2031	Retail Salespersons
	41-2011	Cashiers
	43-4051	Customer Service Representatives
	35-3021	Combined Food Preparation and Serving Workers, Including Fast Food
	41-2022	Parts Salespersons
	41-2021	Counter and Rental Clerks
	41-3099	Sales Representatives, Services, All Other
	41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
	35-3031	Waiters and Waitresses
	35-3011	Bartenders
	35-9031	Hosts and Hostesses
	35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop
<b>Back-office Support</b>	43-5081	Stock Clerks and Order Fillers
	53-7062	Laborers and Freight, Stock, and Material Movers, Hand
	49-3023	Automotive Service Technicians and Mechanics
	29-2052	Pharmacy Technicians
	53-7064	Packers and Packagers, Hand
	43-9061	Office Clerks, General
	35-2021	Food Preparation Workers
	29-1051	Pharmacists
	43-5071	Shipping, Receiving, and Traffic Clerks
	51-3021	Butchers and Meat Cutters
	49-3093	Tire Repairers and Changers
	35-2010	Cooks
	51-3011	Bakers
43-4151	Order Clerks	
<b>Front-line Supervisors</b>	41-1011	Front-Line Supervisors of Retail Sales Workers
	43-1011	Front-Line Supervisors of Office and Administrative Support Workers
	49-1011	Front-Line Supervisors of Mechanics, Installers, and Repairers
	35-1012	Front-Line Supervisors of Food Preparation and Serving Workers
	51-1011	Front-Line Supervisors of Production and Operating Workers
	53-1021	Front-Line Supervisors of Helpers, Laborers, and Material Movers, Hand
<b>General and Operations Managers</b>	11-1021	General and Operations Managers
	11-2022	Sales Managers





## ACKNOWLEDGMENTS

This report resulted from a regional collaboration in San Diego County. This San Diego Workforce Partnership (SDWP) commissioned, edited and designed the report. SDWP would like to acknowledge the advisory group and the 300+ representatives from companies, initiatives and programs in San Diego County who participated in surveys, interviews and focus groups for this report. This study could not have been produced without their support.

- Ryan Young, Sarah Lehmann, Phil Jordan and Josh Williams — BW Research Partnership, Inc.
- Chris Strom — Chicago Cook Workforce Partnership
- Tina Ngo Bartel and Sarah Burns — SDWP
- Richard Barrera — San Diego Unified School District
- Howard Eskew — San Diego Mesa College
- Lee Goodman — Jerome's Furniture
- Julia Harvey — SeaWorld



CHICAGO COOK  
WORKFORCE PARTNERSHIP



Funding for this initiative is part of a \$10.9 million grant the Walmart Foundation made to The Chicago Cook Workforce Partnership. The two-year grant program is the largest investment to date as part of Walmart and the Walmart Foundation's Opportunity initiative, which aims to increase the economic mobility of workers in retail and adjacent sectors by working with nonprofits, educational institutions and government agencies to make it easier for front-line workers to move faster into roles with more responsibility.

Join the conversation: #ReimagineRetail  
For more information, please visit [corporate.walmart.com/opportunity](https://corporate.walmart.com/opportunity).