

WOMEN IN
HOSPITALITY
INDUSTRY
LEADERSHIP
2017



Purpose

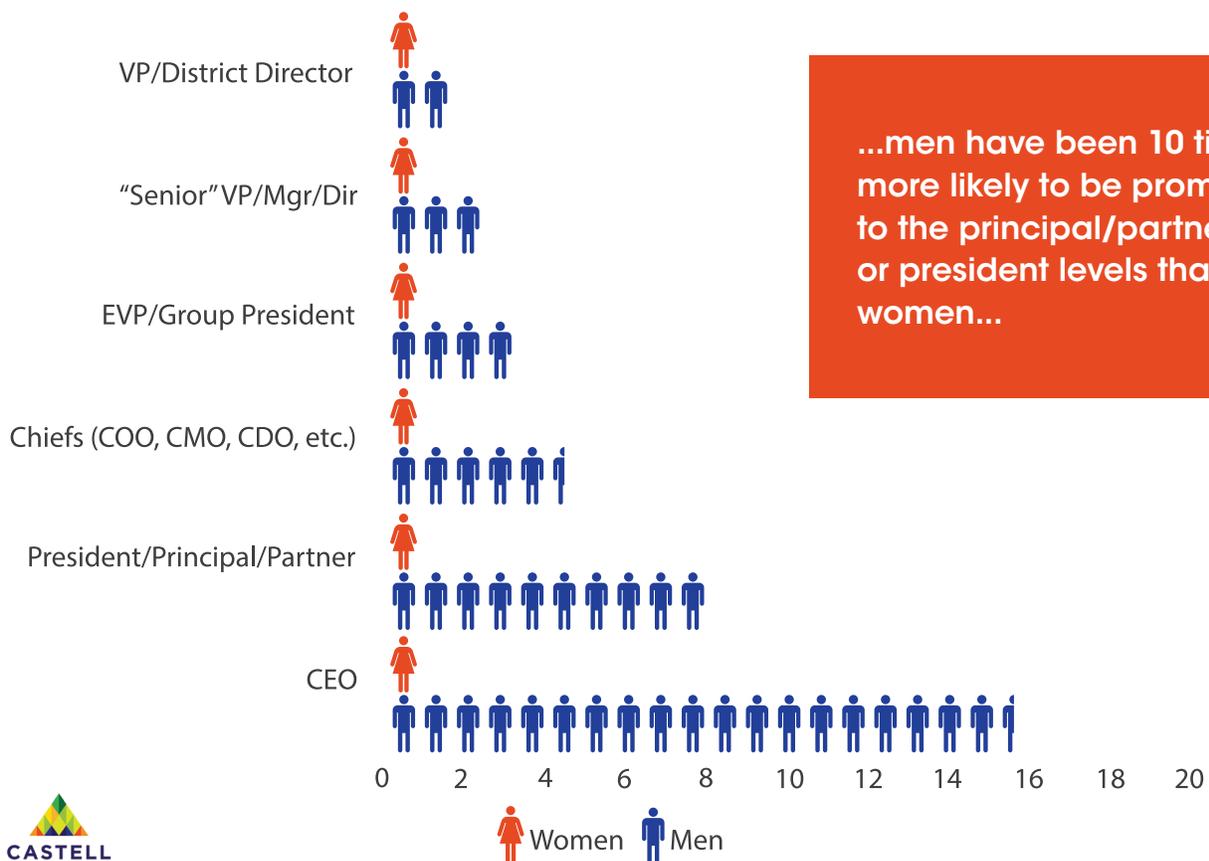
Castell Project, Inc., a 501c3 non-profit, is focused on increasing diversity in hospitality industry leadership. The Project delivers benchmark statistics including this report on women to enable the industry to track its progress and encourage improvement. It also produces the Castell Program, leadership training for women that provides hospitality companies world-class tools and support to accelerate development of their high-potential women. www.CastellProject.org.

The Odds

In the hospitality industry, as of 2016, men have been 10 times more likely to be promoted to the principal/partner or president levels than women, 4 times more likely to be promoted to the EVP/group president level and more than twice as likely to be promoted to the senior VP, VP, or district level. To align with the market at the upper levels, the industry must address the odds against women getting promoted to lower and mid-level executive positions.

Chart 1

Odds of a Woman Getting the Promotion in the Hospitality Industry

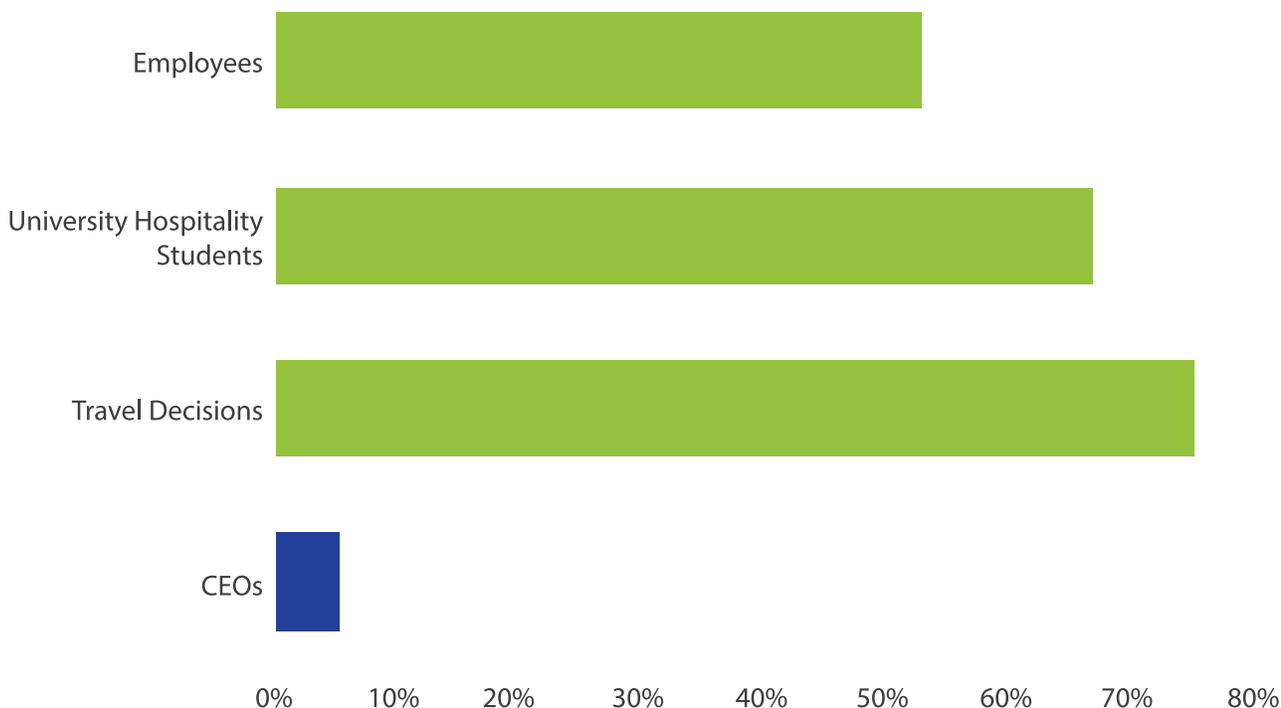


Sources: *The Castell Project. Analysis of the STR Directory of Hotel & Lodging Companies, 2016*

An Industry Lagging

Women are of particular importance to the hospitality industry. They make most of the purchase decisions driving demand, are the majority of industry employees and dominate university hospitality enrollment. Industry leadership today is not aligned with its market, employee base, or talent pipeline.

Chart 2 Women as a % of Hospitality Industry:



Note: Employees in US DOL NIACS 7211 Traveler Accommodation include lodging managers, cleaners, supervisors, clerks and wait staff at lodging establishments but is largely differentiated from the level of employee shown in the leadership charts in this report.

Sources: The Castell Project. US Bureau of Labor Statistics. *Journal of Hospitality & Tourism Education* May 2015. SKIFT Travel Megatrends 2017.

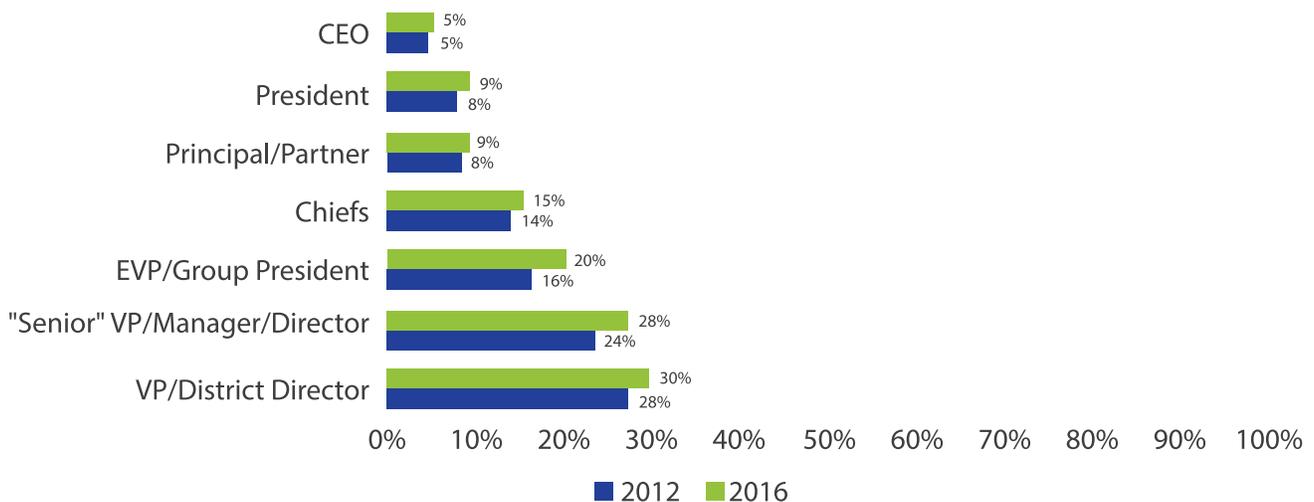
Hotel companies are moving to address this situation. Fortune.com reports on the 2017 [100 Best Workplaces for Women](#) and included 5 hotel companies.

- Marriott International
- Hilton
- Kimpton Hotels & Restaurants
- Hyatt
- Concord Hospitality Enterprises

Women also gained in share of hotel company leadership at all levels from 2012 to 2016, illustrated in chart 3.

However, the hospitality industry, in spite of its dependence on women, lags other industries. For example, the hospitality industry has been less successful at developing its women at every level of management than the firms of the S&P 500 and the S&P 500 Finance, shown in chart 4.

Chart 3 Women's % of Hotel Company Leadership



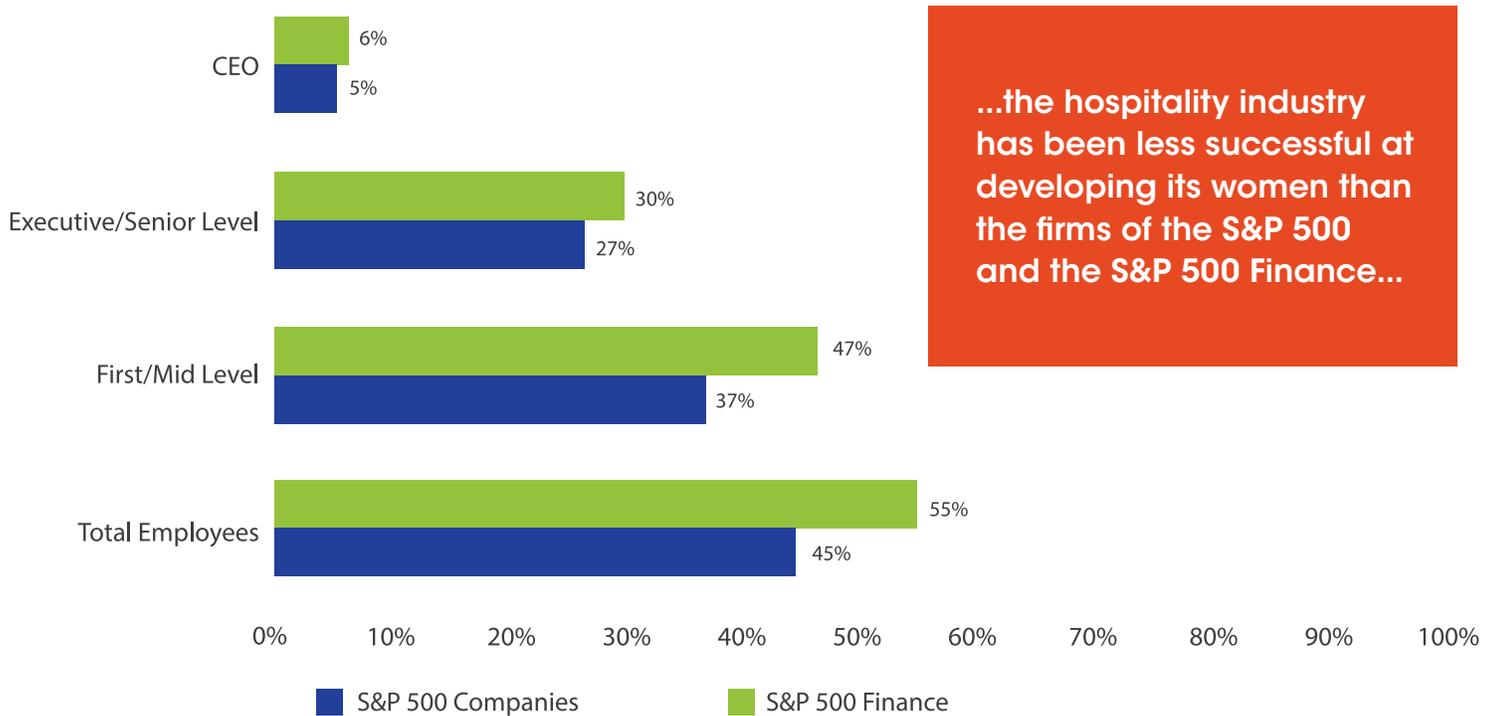
Note: Sample of 12,731 names from the directories for 2012 and 2016

Source: *The Castell Project. Analysis of the STR Directory of Hotel & Lodging Companies, 2012, 2016*

...the hospitality industry, in spite of its dependence on women, lags other industries.

Chart 4

Catalyst.org: Women in S&P 500 Companies



...the hospitality industry has been less successful at developing its women than the firms of the S&P 500 and the S&P 500 Finance...

Source: www.Catalyst.org: [Women in S&P 500 Finance](#) and [Women in S&P 500 Companies](#)

The preference for promoting men at all levels suggests gender bias against women.

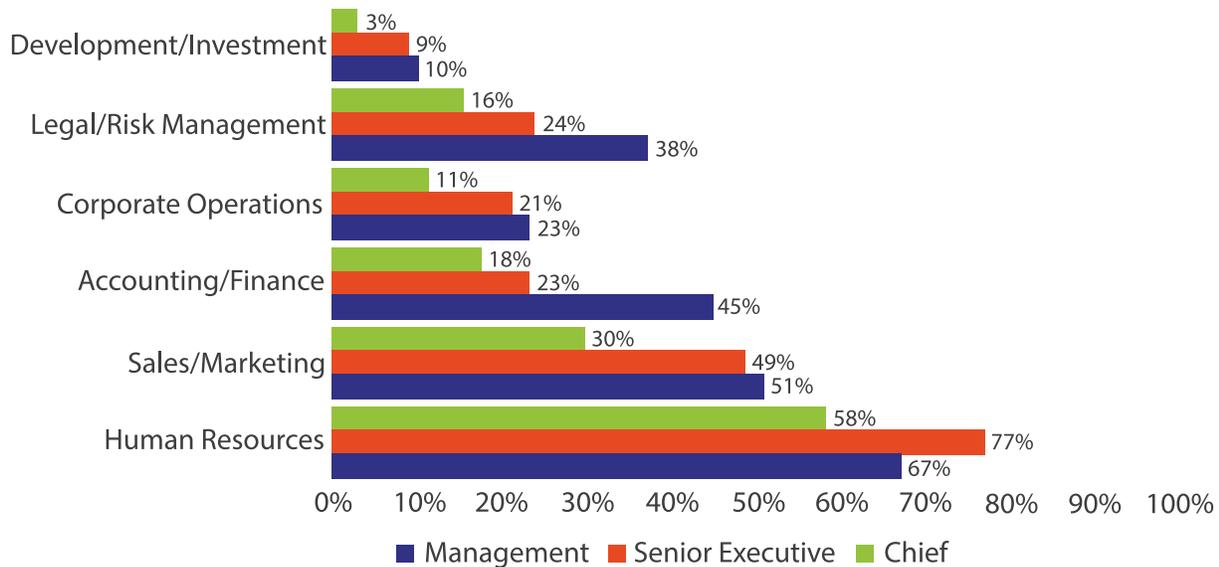
Weakness compared to the S&P 500 statistics suggests that this bias can and is being addressed in other industries and can therefore be addressed in the hospitality industry.

Statistics for the hospitality industry suggest that departments which have been unsuccessful at promoting women into leadership are also unsuccessful at recruiting women. Development fails to recruit and promote. Sales and marketing is successful at recruiting and also fairly successful at promoting. Women are successful at reaching the "chief" level in departments where they have opportunity. So, these statistics illustrate that women can produce at all levels. The failure to promote women seems to be more about bias than about women's commitment or capability.

Rockefeller Foundation found that "the presence of women in leadership positions is important to 76% of women in choosing where to work." This is a probable factor driving the figures in the chart 5. www.rockefellerfoundation.org/report/women-in-leadership-why-it-matters

Chart 5

Women’s Share of Hospitality Jobs by Field and Level



Source: *The Castell Project. Analysis of the STR Directory of Hotel & Lodging Companies, 2012, 2016*

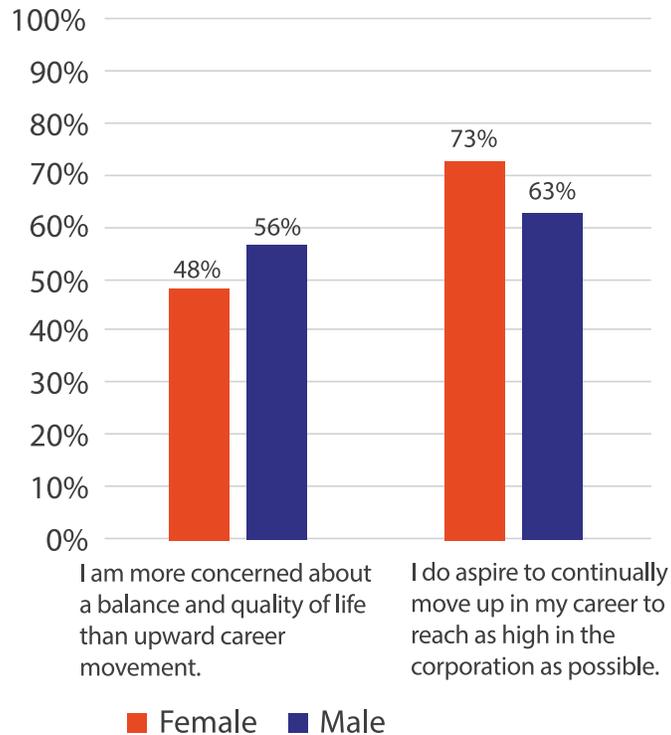
“Americans, men and women alike, unequivocally agree that men and women are equally qualified to lead businesses (96%), and say that it is highly important to them that women and men have the same opportunities for career advancement (82%). Despite their strong convictions about gender equality in leadership, Americans are acutely aware of the forces that hold women back. Nine in ten (92%) say that traditions of, and expectations for, male leadership in workplace cultures contributes at least somewhat to women’s lack of representation in top positions.” Source: *The Rockefeller Foundation, Global Strategy Group, www.rockefellerfoundation.org/report/women-in-leadership-why-it-matters*

The Castell Project conducted an attitude survey with Georgia State University and *Lodging Magazine* in 2017. Survey results suggest that men are at least as concerned about balance and quality of life as women, and that women have even higher career aspirations than men. Among employees and managers, neither aspiration nor commitment seem to be driving the low rate of promotion for women relative to men in the hospitality industry.

Despite their strong convictions about gender equality in leadership, Americans are acutely aware of the forces that hold women back.

Commitment & Aspiration

Chart 6

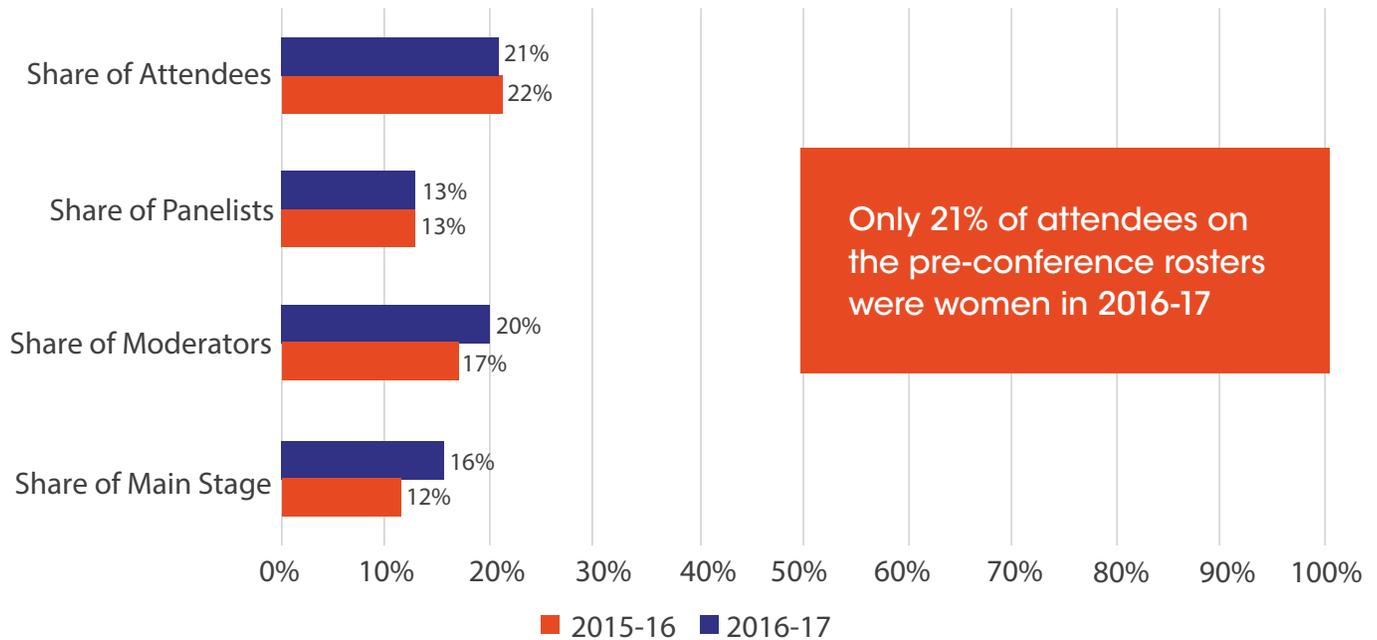


Source: *The Castell Project. Attitude Survey with Georgia State University and Lodging Magazine, 2017*

84% of men and 70% of women agreed that:
“women entering hospitality companies today will have more opportunities for upward movement into top executive positions than have past generations”.

Conferences Are Career Development Opportunities

Chart 7 Presence of Women at Hotel Investment Conferences



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2015-16 and 2016-17

The 4 major hotel investment conferences represent the money in the industry. They are about investment and asset value of the industry and attract senior representatives who make the decisions that drive an industry that generates over half a trillion dollars in global annual revenue (www.Statista.com). Representation and visibility at these events defines career potential for both men and women:

- Only 21% of attendees on the pre-conference rosters were women in 2016-17
- 15% of speakers were women, less than their pro rata share of attendees
- 1 of 8 men on the pre-conference rosters spoke compared 1 of 12 women
- Of women speaking, more are at the division, EVP, SVP level while a higher proportion of men speaking are at the president, principal, managing director level
- Women are more likely to be moderators and less likely to be panelists, as a share of speakers by gender

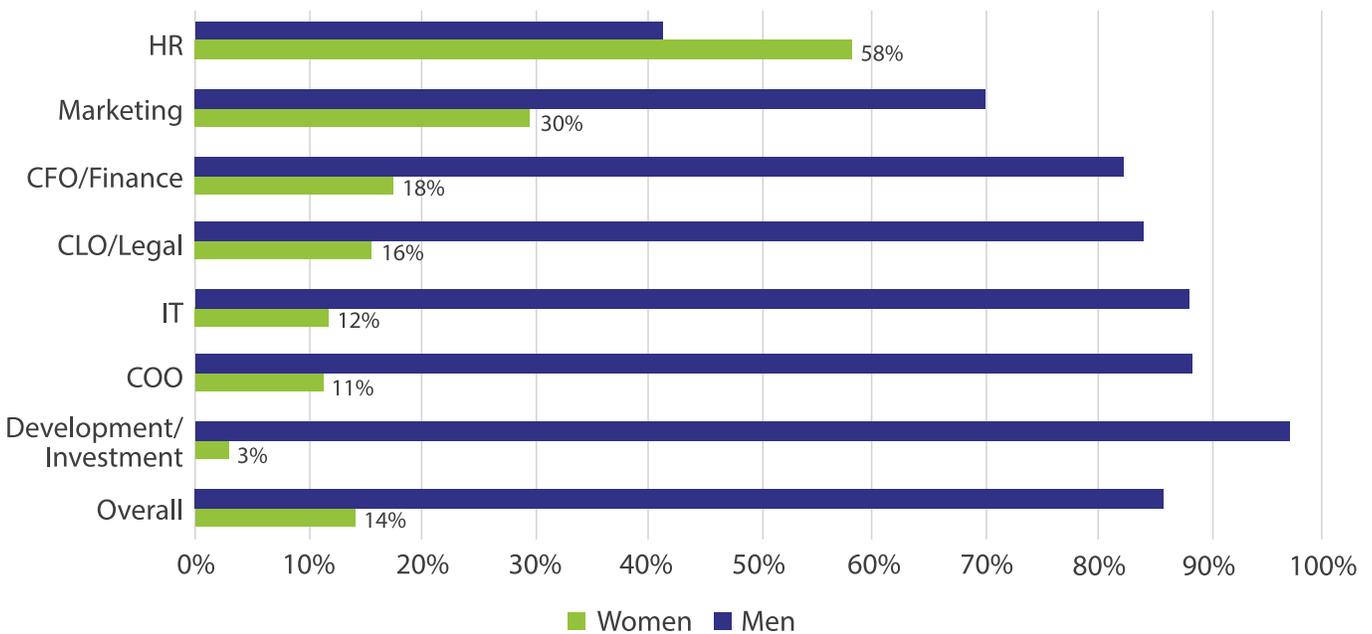
Showcasing women in leadership is crucial to recruiting, retaining and developing talent. According to BloombergView, “denying women opportunities to present at professional conferences prevents them from gaining visibility in their fields, and it deprives their colleagues of valuable perspectives”.
<https://www.bloomberg.com/view/articles/2017-04-18/how-women-should-respond-to-all-male-panels>

Speaking at high profile conferences makes executives visible and defines them as experts. Attending and speaking are part of building an image, creating opportunity for advancement, and developing a reputation as a leader; all crucial to advancing women executives.

Chiefs: Women in the C-Suite

The share of women getting promoted falls off at every level, including the lift to chief. In hotel companies and in hotel real estate, compared in the following charts, women are chiefs where there are opportunities. While Chart 8 represents chiefs in companies that operate hotels in the US and Chart 9 includes chiefs in related industries, both samples reflect areas where opportunities are or are not open to women.

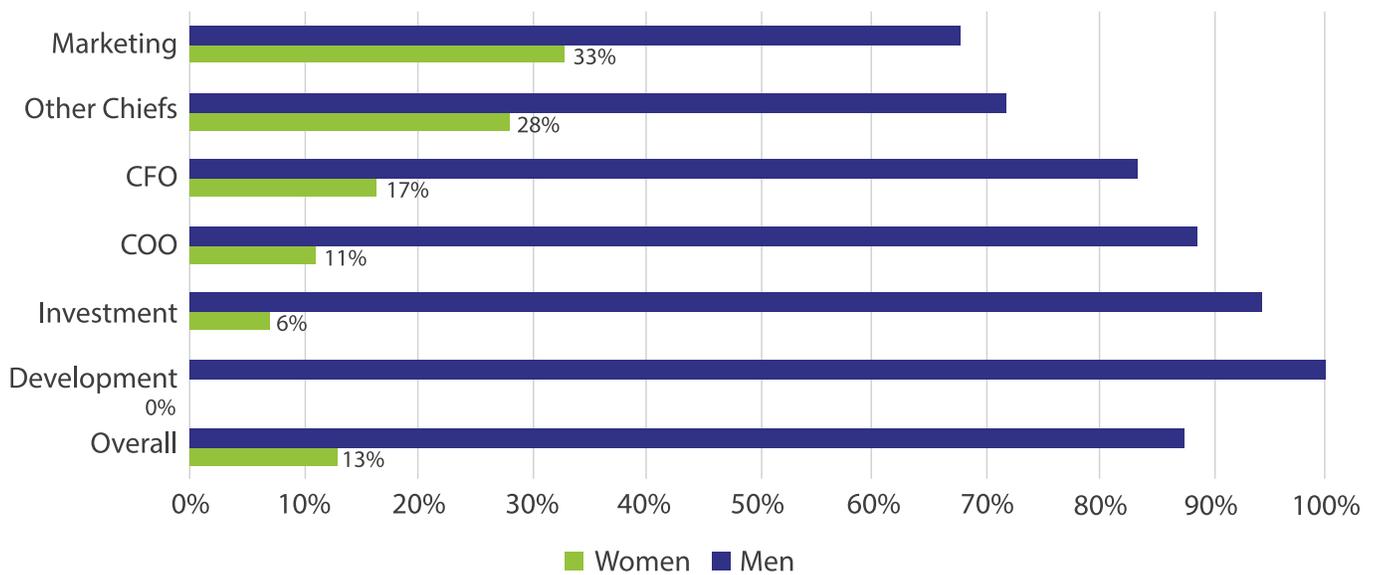
Chart 8 Chiefs: at Hotel Company C-Suites by Field



Source: The Castell Project. Analysis of the [STR Directory of Hotel & Lodging Companies, 2016](#)

Chart 9

Chiefs: at Hotel Investment Conferences by Field



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2015-2016 and 2016-17

Women in the Hospitality Industry Benchmarks

This report presents statistics on the presence of women in hospitality industry leadership using 2 large data sets. Statistics are designed to be updated annually to track movement.

WOMEN IN HOTEL COMPANIES: The [STR Directory of Hotel & Lodging Companies](#), produced by STR, was used to develop the “Women in Hotel Companies” statistics. The study analyzed 2012 and 2016 directories with 12,731 listings of people working for companies that have hotel rooms in the US. There are executives from 986 companies included.

WOMEN IN HOTEL REAL ESTATE: Pre-conference rosters from the 4 leading US hotel investment conferences were analyzed to produce this study of women in the real estate aspect of the hotel business including people who invest in, operate, develop, own, construct, and finance hotels, as well as their advisors, vendors, university professors and students, media and others.

There are 11,860 names listed in the combined conference data set. Data is on a rolling year because of conference timing. Included in the analysis are pre-conference rosters from 2015-2016 and 2016-2017: ALIS, The Lodging Conference, NYU International Hospitality Industry Investment Conference, and the Hunter Hotel Investment Conference.

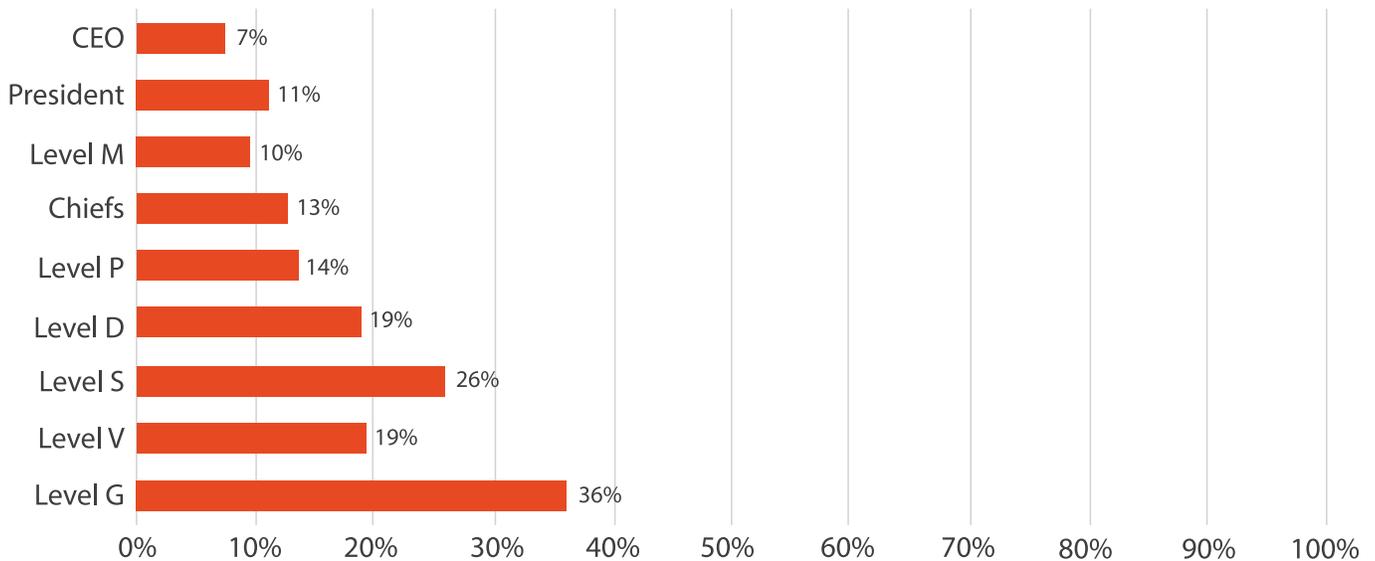
Titles in the hospitality industry are many and varied. For this study, titles are grouped into levels as follows. Depending on sample size, some levels are combined in the subsequent charts.

LEVEL	TITLES
Board	Chairman / Board of Directors
CEO	CEO including President & CEO
President	President including President with other titles such as COO
Level M	Managing Director / Managing Member / Managing Principal or Partner / General Partner
Level P	Principal/Partner / Owner/Founder / Publisher / Member / Shareholder
Chiefs	Chief Officers such as COO / CFO / CDO / CHRO / CMO / CLO / and Other Chiefs
Level D	Head of Division, Group or Region such as Division President / Regional Managing Partner / Global Director / Group President / Head of Brand and others
Level S	EVP / Senior VP / Senior Manager / Director / Associate Principal and others
Level V	VP / Regional or District VP or Director and others
Level G	Hotel GM / Project Manager / Department Director
Level A	Analyst / Associate / Consultant / Account Executive
Level O	Other / Students
Level C	Professionals such as Architect / Attorney / Broker / Professor, with no other titles noted

The charts following show the percent of women on the pre-conference rosters for the 4 conferences held in 2016/2017. The summary charts are:

- **Presence of Women by Level: Hotel Investment Conferences** – including the share of each position held by women at the 4 conferences; for example 7% of CEOs at the conferences are women.

Chart 10 Presence of Women by Level: Hotel Investment Conferences



Note: Sample size of 11,860 in the complete two year data set

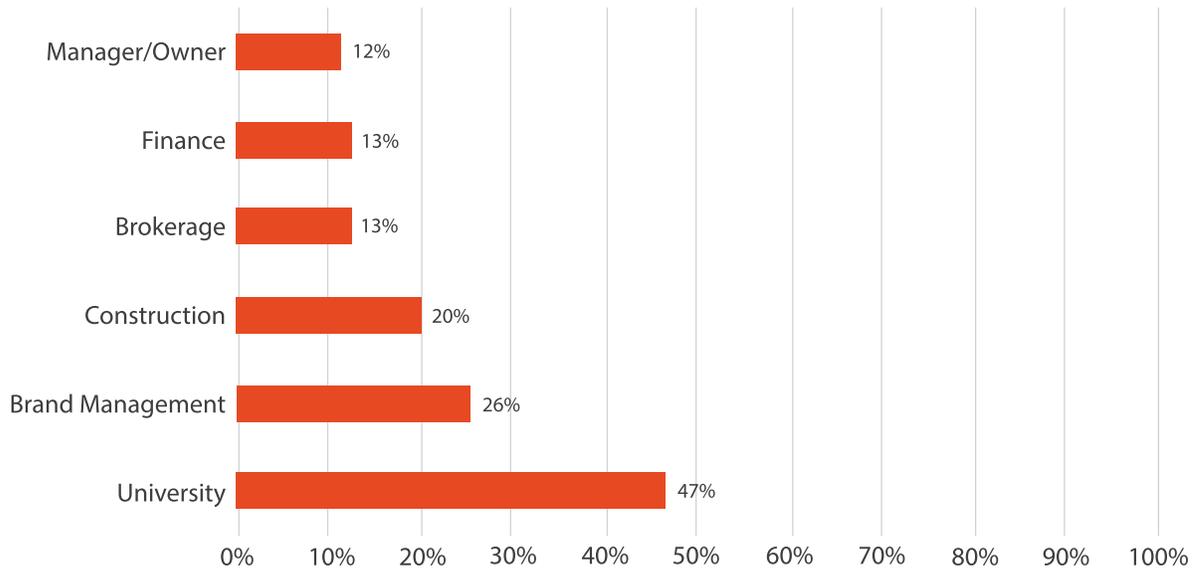
Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2015-16 and 2016-17

7% of CEOs and 35% of Level G
(Hotel GM/Project Manager/
Department Director) at the
conferences are women.

- **Women at Hotel Investment Conferences by Field** – including the share of women representing fields such as construction, finance and consulting at the conferences; for example 20% of attendees representing construction companies at the conferences are women. Women by field is on two tables.

Chart 11

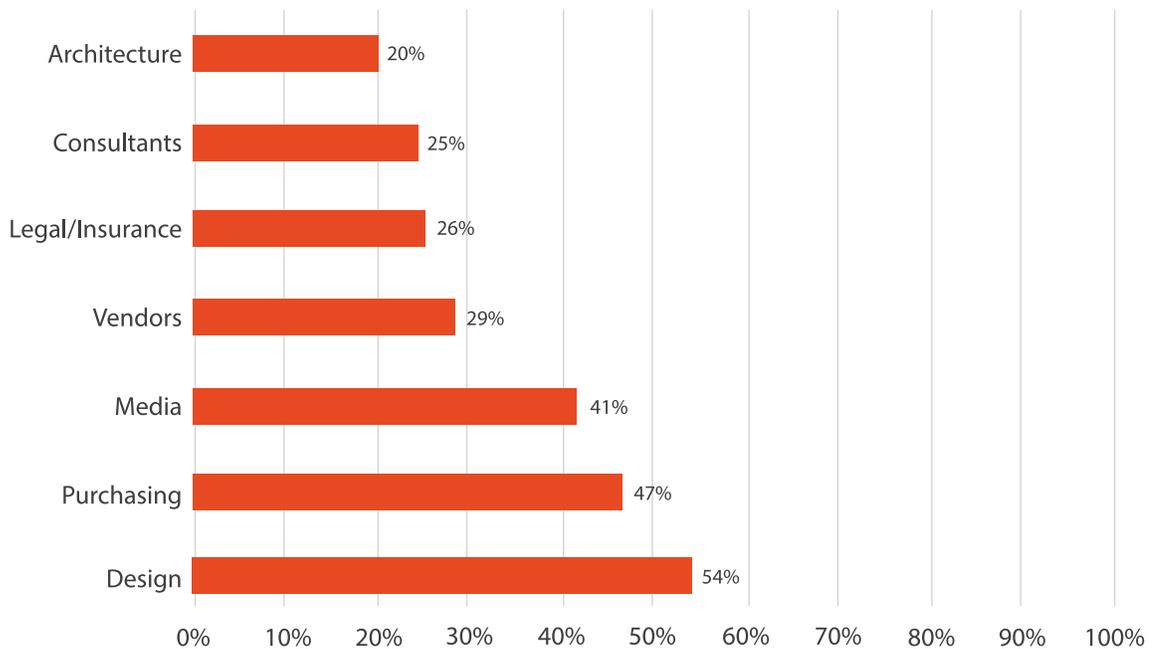
Women at Hotel Investment Conferences by Field 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

Chart 12

Women at Hotel Investment Conferences by Field 2016-17



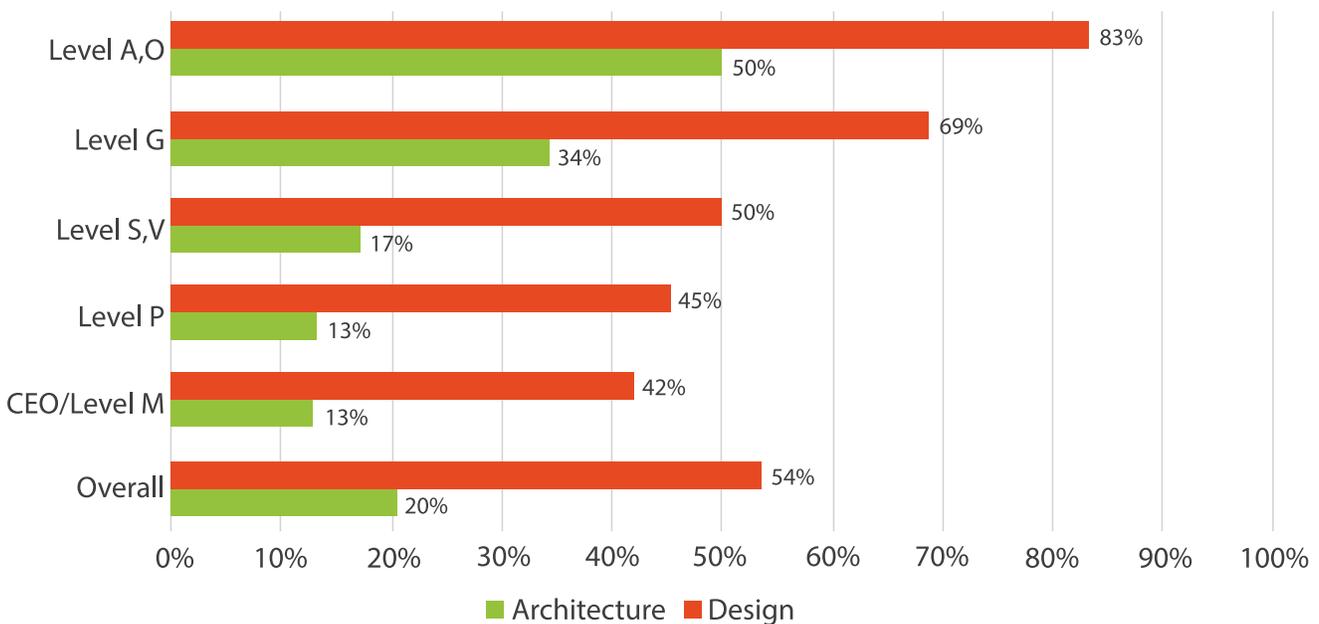
Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

By Specialty

The following charts show how women are represented at the conferences in various specialties. Shown is the percentage of women represented at each level in each field. For example, on the first chart, 45% of principals / partners representing design firms are women compared to 13% representing architecture firms.

- Women in Hospitality Industry Architecture & Design (architecture firm design divisions are included with architecture rather than design)
- Women in Hospitality Industry Brokerage (Real Estate)
- Women in Hospitality Industry Construction
- Women in Hospitality Industry Consulting - including consulting and data analytics firms
- Women in Hospitality Industry Finance - including debt, equity, and brokers (finance)
- Women in Major Hotel Brand Operations - including all aspects of these companies; franchise, brand management, owned hotels, and managed hotels
- Women in Hospitality Industry Legal / Insurance
- Women in Companies that Operate, Develop, Invest in Hotels - including all aspects of companies that manage and/or develop and/or own and invest in hotels

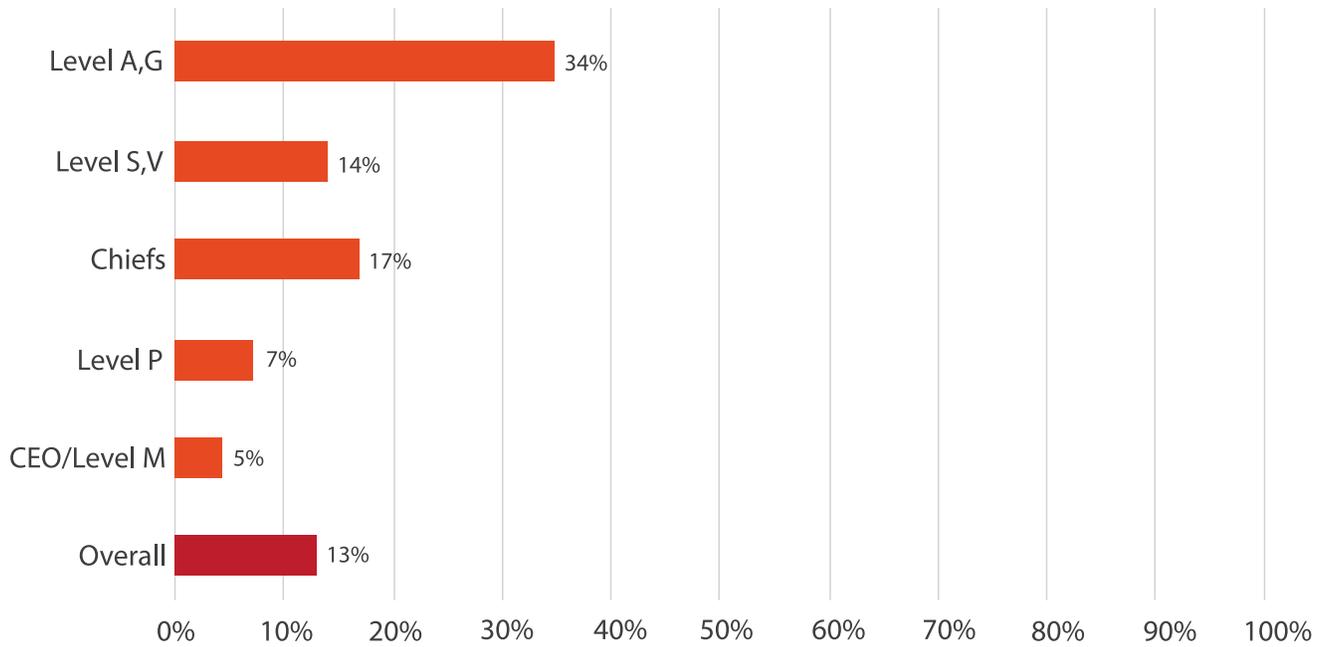
Chart 13 Women in Hospitality Industry Architecture & Design 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

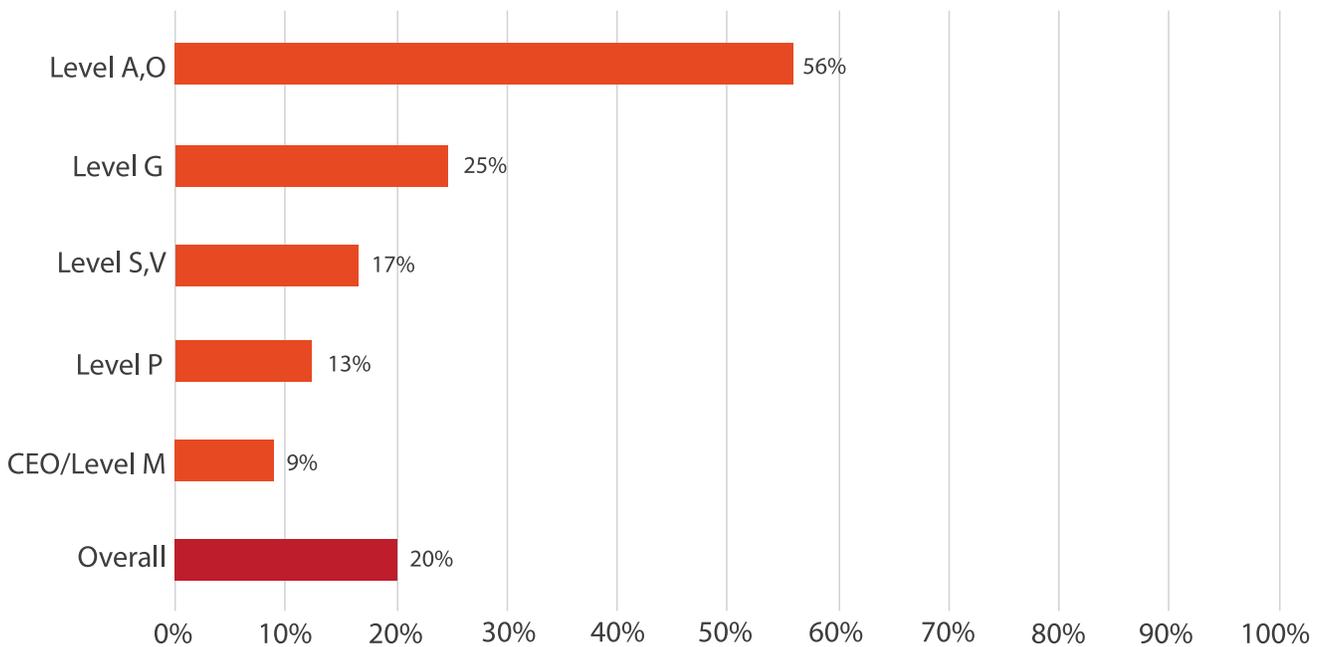
Note on Levels: Level M: Managing Director, Managing Partner | Level P: Principal, Partner | Level D: Head of Division, Group or Region | Level S: EVP, SVP | Level V: VP | Level G: GM, Department Head | Level A: Analyst, Staff | Level C: Other Professionals | Level O: Students, Other.

Chart 14 Women in Hospitality Industry Brokerage 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

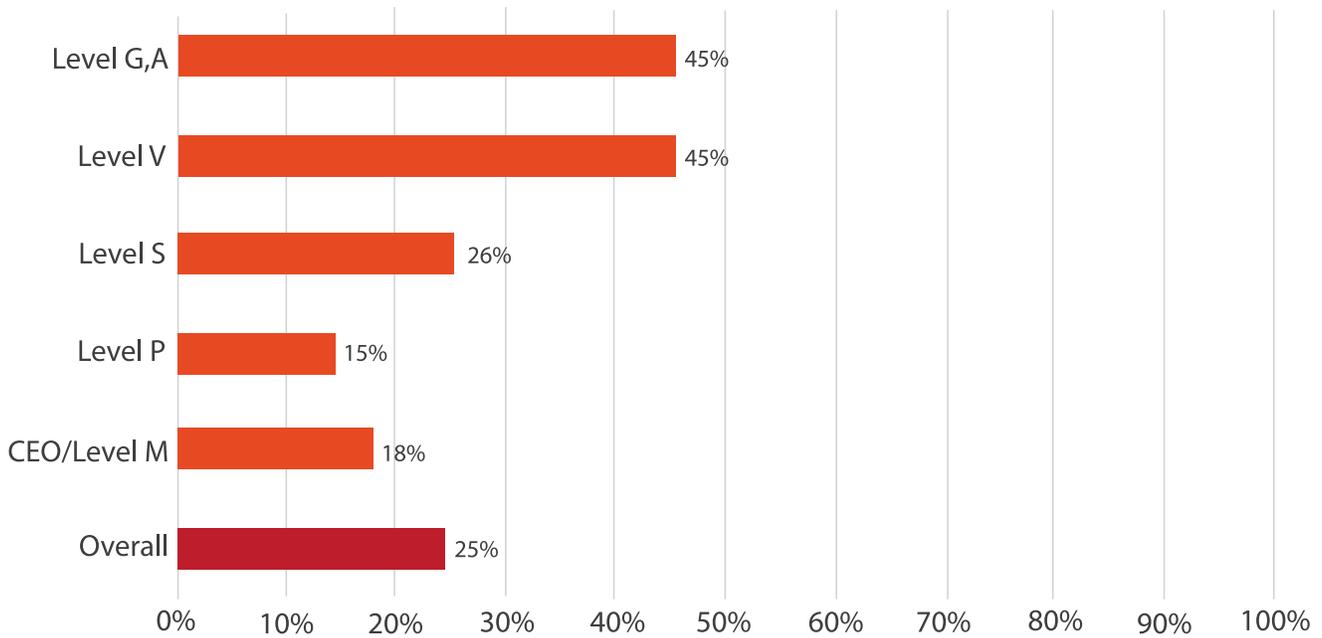
Chart 15 Women in Hospitality Industry Construction 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

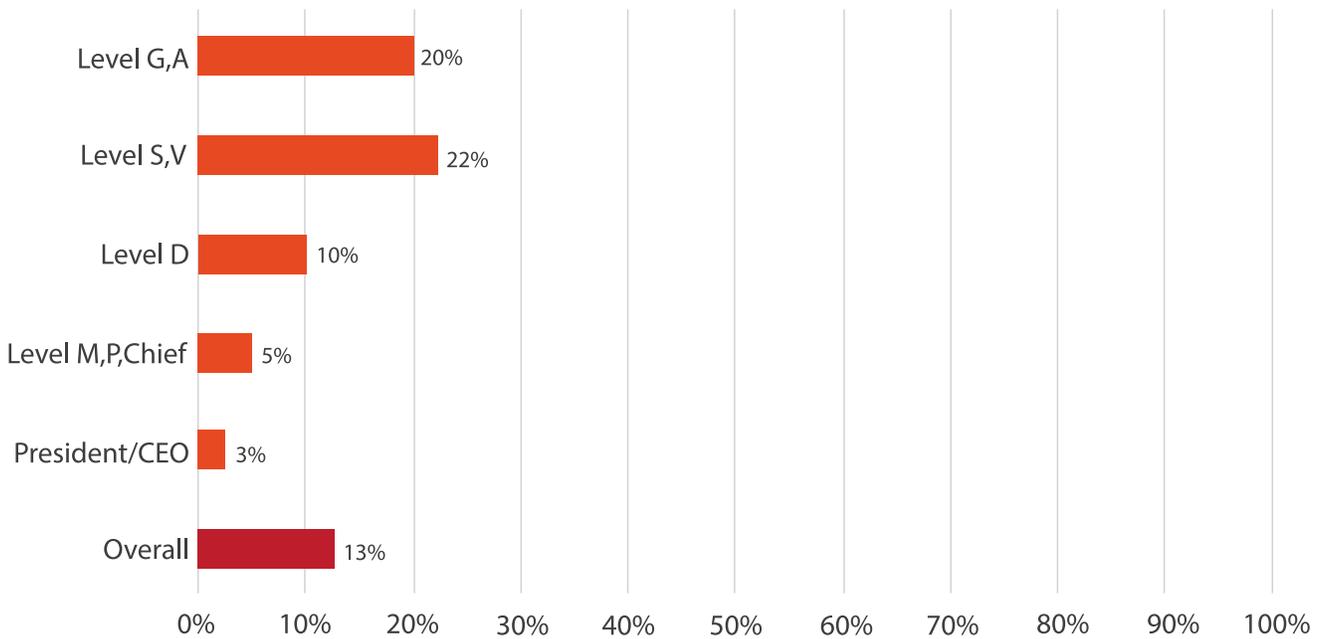
Note on Levels: Level M: Managing Director, Managing Partner | Level P: Principal, Partner | Level D: Head of Division, Group or Region | Level S: EVP, SVP | Level V: VP | Level G: GM, Department Head | Level A: Analyst, Staff | Level C: Other Professionals | Level O: Students, Other

Chart 16 Women in Hospitality Industry Consulting 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

Chart 17 Women in Hospitality Industry Finance 2016-17

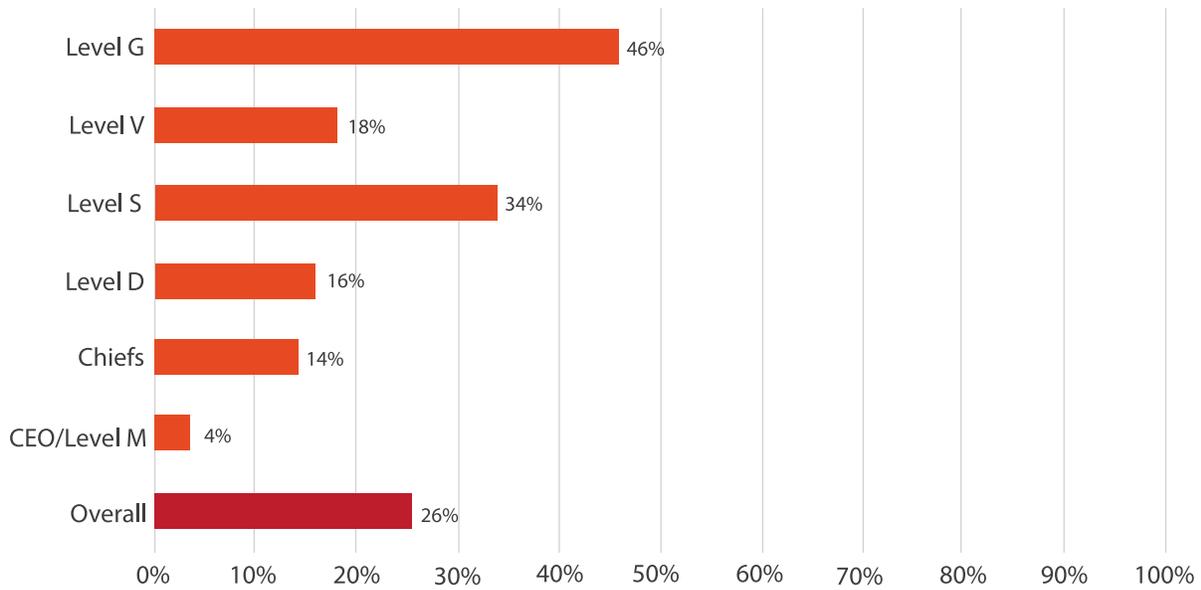


Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

Note on Levels: Level M: Managing Director, Managing Partner | Level P: Principal, Partner | Level D: Head of Division, Group or Region | Level S: EVP, SVP | Level V: VP | Level G: GM, Department Head | Level A: Analyst, Staff | Level C: Other Professionals | Level O: Students, Other

Chart 18

Women in Major Hotel Brand Operations 2016-17

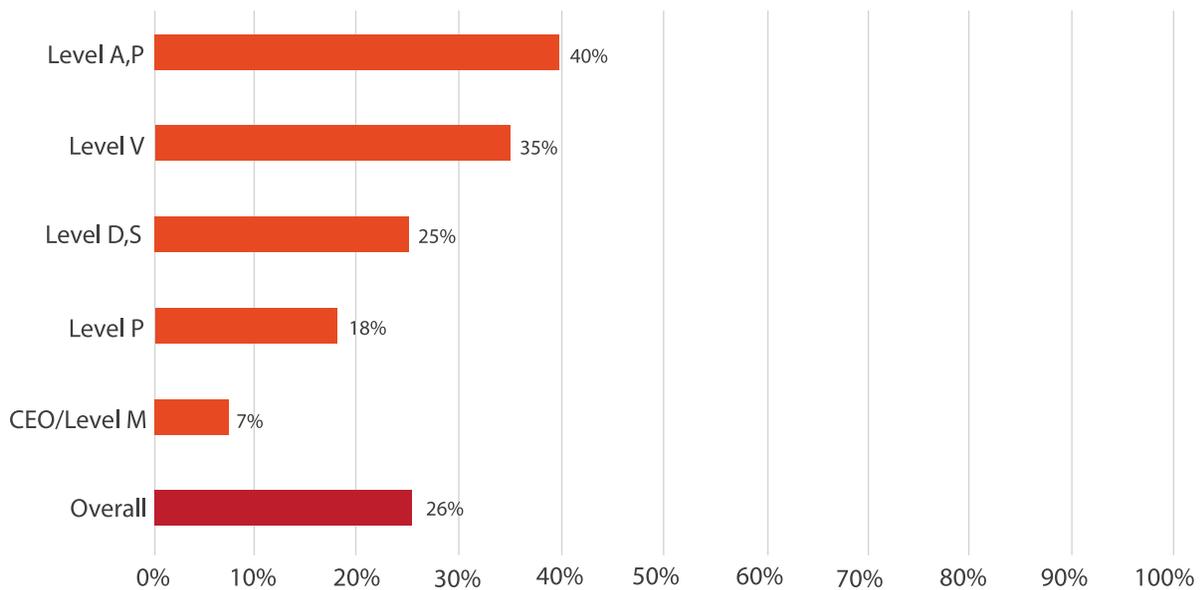


Note: including all aspects of these companies; franchise, brand management, owned hotels, and managed hotels

Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

Chart 19

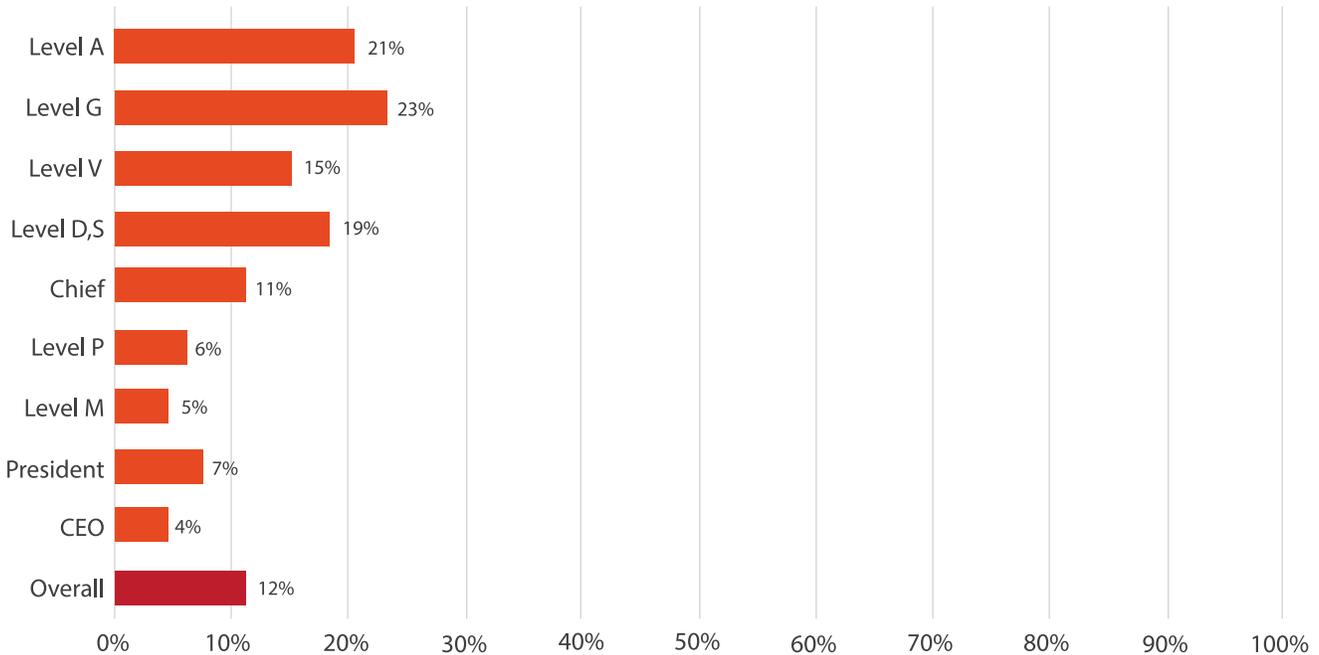
Women in Hospitality Industry Legal/Insurance 2016-17



Source: The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17

Note on Levels: Level M: Managing Director, Managing Partner | Level P: Principal, Partner | Level D: Head of Division, Group or Region | Level S: EVP, SVP | Level V: VP | Level G: GM, Department Head | Level A: Analyst, Staff | Level C: Other Professionals | Level O: Students, Other

Chart 20 Women in Hotel Companies that Manage, Own, Develop 2016-17



Source: *The Castell Project. Analysis of rosters from 4 hotel investment conferences, 2016-17*

Note on Levels: Level M: Managing Director, Managing Partner | Level P: Principal, Partner | Level D: Head of Division, Group or Region | Level S: EVP, SVP | Level V: VP | Level G: GM, Department Head | Level A: Analyst, Staff | Level C: Other Professionals | Level O: Students, Other

RESOURCES AND REFERENCES

www.str.com

The source for premium global data benchmarking, analytics and marketplace insights - and a supporter of the Castell Project. STR data is confidential, reliable, accurate and actionable. Its comprehensive solutions, analytics and unrivalled marketplace insights are built to fuel its clients' growth and help them make better business decisions.

www.paradigm4parity.com

5-Point Roadmap to help companies accelerate the pace of achieving gender parity.

www.catalyst.org/

Research about gender in the workplace, and toolkits to improve career opportunities for women.

www.rockefellerfoundation.org/report/women-in-leadership-why-it-matters/

Thoughtful and useful report on gender in business and key ways to facilitate change.

www.womensleadership.stanford.edu/voice

Voice and Influence Program provides a series of how-to videos.

www.speakerdiversity.com/

Pledge to participate only on panels that include women.

www.CastellProject.org

The Castell Program is a year-long training endeavor that equips high-potential women in the hospitality industry with competencies they need to move up through the executive ranks.



Women in Lodging was established exclusively for female hospitality professionals who want to connect with top professionals nationwide and gain career momentum. The mission of AHLA's Women in Lodging Committee is to promote and develop women into senior executive roles in the industry.