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With casino gaming legal across 44 states, the U.S. gaming industry's economic footprint has grown quickly over the past decade, along with its importance to local economies. That expansion has coincided with greater awareness of the benefits gaming brings to local communities. Today, strong majorities of Americans recognize the jobs and economic benefits that gaming brings.

Ensuring that gaming’s economic benefits are accessible to everyone has always been an industry priority, so too has our commitment to being responsible members of the local communities where we operate. As a result, the gaming industry has invested in efforts to foster an inclusive and diverse workforce, providing equal opportunities and development for all its employees while ensuring that the workforce reflects the communities where we operate.

These efforts have been noticed: Three in four Americans view our industry as having a diverse workforce and providing opportunities for growth and advancement, irrespective of demographic background.

In recent years, the importance of workforce diversity and opportunity has become a major societal focus. Investors, policymakers, regulators, employees, business partners and consumers expect companies to think about their social impact. It is also increasingly important to the future business outlook for many companies as they seek to attract and retain the best talent and provide the best experience for consumers.

The American Gaming Association (AGA) previously published the first-ever industry-wide assessment of member initiatives around ESG issues more broadly. While perceptions of gaming’s workforce diversity are very positive and individual company initiatives are encouraging, part of our commitment to the issue is ensuring that reality matches those perceptions and to track the changing demographics of our industry’s workforce over time.

In late 2022, the AGA commissioned a study – conducted by a major accounting firm – to examine the current state of gaming industry workforce diversity. This benchmarking study is based on Equal Employment Opportunity Commission submissions from AGA member operators and manufacturers that detail how their workforces breakdown along racial and gender lines across job functions.

The data show that:

- The gender breakdown of the gaming industry workforce largely mirrors that of the national workforce. 47.5 percent of gaming employees are women and the gender breakdown across job classifications is largely in-line with the national benchmark. Women are however underrepresented in managerial roles in gaming, as they are in both the national and hospitality benchmarks.
Overall, minorities make up 61.3 percent of the gaming industry workforce, making gaming significantly more diverse than the national (41.7%) and hospitality industry (51.8%) benchmarks.

The gaming operator workforce has become more racially and ethnically diverse over the past decade. More than 62 percent of the operator workforce identify as members of an ethnic minority, an increase of nearly 20 percent from 2011 and substantially higher than the national (41.7%) and hospitality industry (51.8%) benchmarks.

The gaming industry workforce is more diverse than the national and hospitality workforce benchmarks across managerial positions: the Executive/Senior Level Officials & Managers, First/Mid-Level Officials & Managers and Professionals classifications all have greater minority representation in the gaming industry than across other benchmarks.

The gaming industry is significantly more diverse at the First/Mid-Level and Professional levels, where minorities make up about 55 percent of the workforce. These employees are already industry leaders in many respects and are the talent pool that future C—Suite officers and Board members will come from.

These findings are encouraging. The gaming industry is not only significantly more diverse today than a decade ago, but is also more racially diverse than the U.S. workforce as a whole. Tribal gaming operators especially offer opportunity to communities and populations that are often overlooked by other industries.

Like many industries, the corporate executive and board levels are less representative, however the outlook for gaming is very positive. This is true at the mid-level manager classification in particular, which represents future corporate executive and board members, where the gaming industry workforce is notably more diverse.

There is no quick fix when it comes to workforce diversity and every industry faces unique challenges related to hiring, workforce development and employee retention.

Workforce diversity is especially important for the gaming industry. As a continuously evolving sector that provides cutting-edge entertainment offerings, gaming requires a workforce that can create experiences that appeal to a diverse range of consumers and outcompete other entertainment options.

The detailed report that follows highlights the results of the gaming industry’s work to develop a workforce that is representative of America, provides opportunities for advancement regardless of background and has an emerging class of leaders that will reshape how the C-Suite and boardroom look in years to come.

The AGA looks forward to discussing these findings with our members and working collaboratively together to create more diverse, inclusive workplaces and to best serve the communities where we operate.
OVERVIEW

APPROACH

Operator and manufacturer members of the AGA were given the opportunity (from November 17, 2022 to December 23, 2022) to submit their latest EEO-01 form in order to be included in the Gaming Industry Workforce Diversity Report. The EEO-01 form asks about diversity metrics and is collected annually from employers with 100+ employees in accordance with Title VII of the Civil Rights Act of 1964 and Equal Employment Opportunity Commission regulations. Collected data is used to track employment patterns and trends in different industries and regions. Additional information on the EEO-1 form can be found here.

AGA member participants in the Gaming Industry Workforce Diversity Report submitted their EEO-01 information via a secure transfer process to a third-party accounting firm who calculated the various diversity metrics and safeguarded confidentiality. The data submitted has been reviewed for consistency across participants.

A total of 26 organizations participated, including companies from the manufacturer (8) and the commercial and tribal operator (18) segments of the gaming industry. Through the EEO-01 form, participants provided gender, race/ethnicity and job classification data for their workforces. Non-disclosed data was not included in the calculation of metrics.

ABOUT THE REPORT

The Gaming Industry Workforce Diversity Report is divided into five sections, analyzing representation by the following metrics:

A. Gender  
B. Race  
C. Job Classification  
D. Gender by Job Classification  
E. Race by Job Classification

Throughout this report, participating AGA members who submitted their EEO-01 report to be included are referenced as the “gaming industry.” Where possible, we have provided a breakdown view of the manufacturer workforce and the operator workforce (inclusive of commercial and tribal operators). The metrics provided in this report describe the combined representation of different demographic groups. For example, the Manufacturer Percent Female Metric is calculated by dividing the total number of female employees across all participating manufacturer organizations by the total number of employees reported by these organizations.

1 Sovereign tribal nations are not required to file this form; however several AGA tribal operator members voluntarily completed the form for the purpose of this study.
When available, additional benchmarks from the 2020 EEOC dataset and prior trend data are also included in this report:

- **The national benchmark**, which considers the total 2020 workforce in the United States across all industries.

- **The hospitality industry benchmark**, which considers the 2020 combined workforce for organizations classified as NAICS 71&72, where most gaming industry jobs are classified. NAICS 71 encompasses the Arts, Entertainment and Recreation industry while NAICS 72 encompasses the Accommodation and Food Services industry.

- 2011 gaming industry benchmark, with available trend data from the Gaming Industry: Employment Diversity Snapshot 2013, A New Baseline Report, the last study conducted by the AGA on the gaming industry’s diversity metrics which captured 2011 data for operator companies only. Throughout this report, data from this report is referenced as the “2011 gaming industry.”

Information regarding definitions of job classifications and racial groups can be found in the Appendix.

**A NOTE ABOUT MANUFACTURER DATA**

Making comparisons across industry sectors and benchmark comparisons may not always be appropriate. AGA member companies that participated in the 2013 report were all commercial operators. Further, the NAICS Codes utilized for hospitality benchmark comparisons are unlikely to be representative of the gaming manufacturer workforce.

For that reason, throughout this report we have included certain comparisons between the gaming manufacturing workforce and the combined workforce for Computer and Electronic Product Manufacturing, and Electrical Equipment, Appliance and Component Manufacturing workforces (NAICS Codes 334 & 335) to provide a more relevant point of reference for how gaming manufacturers compare with similarly situated industries. Although it is not included tables or charts, this comparison is referred to as the “electronic manufacturer benchmark” throughout the body of the report.
WORKFORCE DIVERSITY METRICS

ANALYSIS BY GENDER GROUP

The gender distribution of the gaming workforce is in line with both the overall national workforce and the broader hospitality industry benchmarks, as reported by the EEOC. Compared to a decade ago, males make up a slightly higher proportion of the gaming industry workforce than they did in 2011, increasing from 50.8 percent to 52.5 percent.

Figure 1 - Gender Representation by Organization Type

It is worth noting that the manufacturer workforce has a higher proportion of males, at 61.5 percent, reflecting the significantly different workforce pool between the two sectors, as evident throughout this report. Gaming manufacturers employ a significantly higher share of females (38.5%) compared to the electronic manufacturer benchmark (30.5%).

ANALYSIS BY RACIAL/ETHNIC GROUP

Overall, racial and ethnic minorities make up 61.3 percent of the gaming industry workforce, making gaming significantly more diverse than the national (41.7%) and hospitality industry (51.8%) benchmarks.

Of the minority workforce within the gaming industry, Hispanics make up the largest segment at 23.0 percent, largely unchanged from a decade ago. The Black employee population now constitutes the second largest minority group, with its representation increasing from 12.2 percent in 2011 to 18.6 percent. Asians are the third largest minority group, constituting 14.4 percent of the gaming industry workforce, a proportion that has remained relatively stable over the past decade.
The gaming operator workforce has become more racially and ethnically diverse over the past decade. More than 62 percent of the operator workforce identify as members of a racial minority, an increase of nearly 9 percent from 2011 and substantially higher than the national (41.7%) and hospitality industry (51.8%) benchmarks. This increase is largely driven by increased representation among the Black employee population.

Meanwhile, the gaming manufacturer workforce is more diverse than the broader electronic manufacturing industry. Employees who belong to a racial minority comprise 45.1 percent of the gaming manufacturer workforce, compared to 38.4 percent for the electronic manufacturer benchmark.

**Figure 2 - Racial/Ethnic Representation by Organization Type**

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<thead>
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</tr>
</tbody>
</table>

**ANALYSIS BY JOB CLASSIFICATION GROUP**

Analyzing the demographic of job classifications within the gaming industry, Service Workers constitute the largest job classification group, accounting for 58.7 percent of the total workforce.

Among operators, 61.9 percent of the workforce are Service Workers, a lower percentage than is found in the broader overall hospitality industry (68.0%) and modestly lower than 66.9 percent of the industry workforce classified as service workers a decade ago.

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2 Full descriptions of the various job classifications are provided in the Appendix.
The data indicates a notable shift towards “office-based jobs” within the gaming operator workforce (the only industry segment represented in the 2011 data), with classifications such as First/Mid-Level Officials & Managers (from 7.7% to 12.2%), Professionals (from 2.7% to 4.5%) and Sales Workers (from 2.5% to 5.2%) comprising considerably larger shares of the workforce than a decade ago.

Not surprisingly, there are significant differences in classification makeup between gaming operator and manufacturer workforces, reflecting the different nature of their businesses. Manufacturers have a smaller workforce of Service Workers at 30.8 percent compared to operators at 61.9 percent. Compared to operators, manufacturers also have greater representations of Professionals (22.4% compared to 4.5%) and First/Mid-Level Officials & Managers (18.6% compared to 12.2%).

**ANALYSIS BY GENDER AND JOB CLASSIFICATION GROUP**

When comparing the total gaming industry workforce by gender and job classification to the national and hospitality benchmarks there are relatively few substantial differences, though certain imbalances stand out.

In comparison to the national benchmark, the gaming industry employs a higher share of males in three job classification groups: Technicians (+36 percentage points), Professionals (+12.7) and Service Workers (+11.5). Conversely, two classifications exhibit a lower proportion of males in the gaming industry: Sales Workers (-6.6) and Operatives (-6.7). Other classification comparisons display a difference of five percentage points or less between the two gender groups.
The gaming industry workforce exhibits comparable patterns to the hospitality benchmark, with metric differences mostly less than five percentage points. Exceptions include higher gaming industry representation of males among Professionals (+5.6 percentage points), Technicians (+11), Sales Workers (+5.5) and Craft Workers (+7.3).

Figure 4 - Gaming Industry Workforce: Gender Representation by Job Classification

In terms of gender representation across job classifications and organizational types, manufacturers tend to skew more heavily male across most job classifications compared to operators, as well as the national benchmark.

However, compared to the electronic manufacturer benchmark, gaming manufactures employ a share of females that's more than five percentage points higher across a range of job classifications: Executives/Senior Level Officials & Managers (+6.2 percentage points), First/Mid-Level Officials & Managers (+7.2), Sales Workers (+19.4), and Service Workers (+20.6).

Table 1 - Gender Representation by Job Classification by Organization Type
ANALYSIS BY RACIAL/ETHNIC AND JOB CLASSIFICATION GROUP

The gaming industry’s workforce has a greater degree of racial diversity compared to both national and hospitality industry benchmarks, with minority groups enjoying greater representation across various job classifications.

When looking at race by job classification for the gaming industry workforce (Figure 5), in nearly half of the job classifications a majority of the workforce is made up of White employees, including Executives/Senior Level Officials & Managers (74.5%), First/Mid-Level Officials & Managers (54.6%), Professionals (56.6%), Technicians (59.5%) and Craft Workers (61.8%). In contrast, Sales Workers (66.2%), Administrative Support Workers (59.0%), Operatives (62.9%), Laborers & Helpers (77.7%) and Service Workers (67.7%) have majority minority workforces.

Asians are the next largest group after Whites in Executive/Senior Level Officials & Managers (8.6%) and Professional job classifications (16.0%). Among First/Mid-Level Officials & Managers positions, Hispanics are the largest minority group (14.9%), whereas Blacks represent the largest minority group in the Technicians (14.4%), Administrative Support Workers (20.3%) and Laborers & Helpers (30.4%) job classifications.

American Indian, Hawaiian and 2+ Races have a smaller representation across all job classifications. In the gaming industry, these ethnic groups have equal or greater representation in Executive/Senior Level Officials & Managers positions as in the national and hospitality workforce benchmarks.

Figure 5 - Gaming Industry Workforce: Racial/Ethnic Representation by Job Classification
Tables 2 and 3 present a comparative analysis of racial representation across various job classifications for the national and hospitality workforce benchmarks.

**Table 2 - National Workforce: Racial/Ethnic Representation by Job Classification**

<table>
<thead>
<tr>
<th>RACE/ETHNICITY</th>
<th>Exec/Sr.</th>
<th>1st/Mid.</th>
<th>Prof.</th>
<th>Tech.</th>
<th>Sales</th>
<th>Admin.</th>
<th>Craft</th>
<th>Oper.</th>
<th>Labor</th>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>83.1%</td>
<td>72.2%</td>
<td>67.3%</td>
<td>62.2%</td>
<td>60.9%</td>
<td>57.4%</td>
<td>64.8%</td>
<td>51.7%</td>
<td>37.8%</td>
<td>42.8%</td>
</tr>
<tr>
<td>Black</td>
<td>3.6%</td>
<td>7.7%</td>
<td>8.4%</td>
<td>14.3%</td>
<td>14.3%</td>
<td>18.2%</td>
<td>9.2%</td>
<td>20.0%</td>
<td>22.7%</td>
<td>25.5%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>4.7%</td>
<td>9.2%</td>
<td>7.6%</td>
<td>13.2%</td>
<td>16.8%</td>
<td>15.9%</td>
<td>20.4%</td>
<td>20.6%</td>
<td>31.0%</td>
<td>22.2%</td>
</tr>
<tr>
<td>Asian</td>
<td>6.9%</td>
<td>8.4%</td>
<td>13.9%</td>
<td>7.1%</td>
<td>4.0%</td>
<td>4.6%</td>
<td>2.8%</td>
<td>4.6%</td>
<td>4.5%</td>
<td>5.0%</td>
</tr>
<tr>
<td>American Indian</td>
<td>0.3%</td>
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<tr>
<td>Hawaiian</td>
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<td>0.3%</td>
<td>0.5%</td>
<td>0.4%</td>
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<tr>
<td>2+ Races</td>
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<td>1.7%</td>
<td>2.1%</td>
<td>2.2%</td>
<td>2.9%</td>
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<td>1.5%</td>
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</tr>
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</table>

Among both manufacturer and operator organizations, Asians constitute the largest minority group in the Executive/Senior Level Officials & Managers and Professional classifications, while Blacks are the largest minority group among Administrative Support Workers and Hispanics are the largest minority group in the Craft Workers classification.

Tables 4 and 5 below provide an additional view of the data by illustrating the results of the Gaming Industry participants across the manufacturer and operator organization types.

**Table 3 - Hospitality Industry Workforce: Racial/Ethnic Representation by Job Classification**

<table>
<thead>
<tr>
<th>RACE/ETHNICITY</th>
<th>Exec/Sr.</th>
<th>1st/Mid.</th>
<th>Prof.</th>
<th>Tech.</th>
<th>Sales</th>
<th>Admin.</th>
<th>Craft</th>
<th>Oper.</th>
<th>Labor</th>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>79.0%</td>
<td>64.9%</td>
<td>68.3%</td>
<td>67.7%</td>
<td>58.1%</td>
<td>54.0%</td>
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<td>50.5%</td>
<td>42.9%</td>
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<td>Black</td>
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<tr>
<td>Asian</td>
<td>4.3%</td>
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**Table 4 - Operator Workforce: Racial/Ethnic Representation by Job Classification**

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</table>
White employees make up the largest share of the Executive/Senior Level Officials & Managers classification across all organization types and industry benchmarks.

However, the gaming industry workforce is more diverse than the national and hospitality workforce benchmarks with Executive/Senior Level Officials & Managers, First/Mid-Level Officials & Managers and Professionals, showing a greater representation of minorities in these three managerial classifications.

Perhaps most notably, the gaming industry stands out for its significant diversity at the First/Mid-Level and Professional levels. These employees are already industry leaders in many respects and are the talent pool that future C-Suite officers and Board members will come from.

Table 6 - Racial/Ethnic Representation in Management by Organization Type

<table>
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<tr>
<th>CLASSIFICATION</th>
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<th>MINORITIES</th>
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<td>Exec/Sr. Lvl Off. &amp; Mgrs</td>
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<td>83.1%</td>
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<td>1st/Mid-Lvl Off. &amp; Mgrs</td>
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<td>66.1%</td>
</tr>
<tr>
<td>Professionals</td>
<td>56.6%</td>
<td>60.5%</td>
</tr>
</tbody>
</table>
Note: The following definitions and descriptions below are taken from the 2021 EEO-1 instruction booklet available here.

**DEFINITIONS OF THE EEO-1 RACE/ETHNICITY GROUPS**

- **White** - A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- **Black or African American** - A person having origins in any of the black racial groups of Africa.
- **Hispanic or Latino** - A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.
- **Asian** - A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
- **American Indian or Alaska Native** - A person having origins in any of the original peoples of North and South America (including Central America) and who maintain tribal affiliation or community attachment.
- **Native Hawaiian or Other Pacific Islander** - A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- **Two or More Races** - All persons who identify with more than one of the above five races (White, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, American Indian or Alaska Native). For the purposes of this group, identifying as Hispanic or Latino and only one of the listed 5 race groups does NOT qualify.

**DEFINITIONS OF THE EEO-1 JOB CLASSIFICATIONS**

- **Executive/Senior Level Officials and Managers** - Individuals who plan, direct and formulate policies, set strategy and provide the overall direction of enterprises/organizations for the development and delivery of products or services, within the parameters approved by boards of directors or other governing bodies. Residing in the highest levels of organizations, these executives plan, direct or coordinate activities with the support of subordinate executives and staff managers. They include, in larger organizations, those individuals within two reporting levels of the CEO, whose responsibilities require frequent interaction with the CEO. Examples of these kinds of managers are: chief executive officers, chief operating officers, chief financial officers, line of business heads, presidents or executive vice presidents of functional areas or operating groups, chief information officers, chief human resources officers, chief marketing officers, chief legal officers, management directors and managing partners.
• **First/Mid-Level Officials and Managers** - Individuals who serve as managers, other than those who serve as Executive/Senior Level Officials and Managers, including those who oversee and direct the delivery of products, services or functions at group, regional or divisional levels of organizations. These managers receive directions from the Executive/Senior Level management and typically lead major business units. They implement policies, programs and directives of executive/senior management through subordinate managers and within the parameters set by Executive/Senior Level management. Examples of these kinds of managers are: vice presidents and directors, group, regional or divisional controllers; treasurers; human resources, information systems, marketing and operations managers. The “First/Mid-Level Officials and Managers” subcategory also includes those who report directly to middle managers. These individuals serve at functional, line of business segment or branch levels and are responsible for directing and executing the day-to-day operational objectives of enterprises/organizations, conveying the directions of higher-level officials and managers to subordinate personnel and, in some instances, directly supervising the activities of exempt and non-exempt personnel. Examples of these kinds of managers are: first-line managers; team managers; unit managers; operations and production managers; branch managers; administrative services managers; purchasing and transportation managers; storage and distribution managers; call center or customer service managers; technical support managers; and brand or product managers.

• **Professionals** - Most jobs in this category require bachelor and graduate degrees and/or professional certification. In some instances, comparable experience may establish a person’s qualifications. Examples of these kinds of positions include: accountants and auditors; airplane pilots and flight engineers; architects; artists; chemists; computer programmers; designers; dieticians; editors; engineers; lawyers; librarians; mathematical scientists; natural scientists; registered nurses; physical scientists; physicians and surgeons; social scientists; teachers; and surveyors.

• **Technicians** - Jobs in this category include activities that require applied scientific skills, usually obtained by post-secondary education of varying lengths, depending on the particular occupation, recognizing that in some instances additional training, certification, or comparable experience is required. Examples of these types of positions include: drafters; emergency medical technicians; chemical technicians; and broadcast and sound engineering technicians.

• **Sales Workers** - These jobs include non-managerial activities that wholly and primarily involve direct sales. Examples of these types of positions include: advertising sales agents; insurance sales agents; real estate brokers and sales agents; wholesale sales representatives; securities, commodities and financial services sales agents; telemarketers; demonstrators; retail salespersons; counter and rental clerks; and cashiers.

• **Administrative Support Workers** - These jobs involve non-managerial tasks providing administrative and support assistance, primarily in office settings. Examples of these types of positions include: office and administrative support workers; bookkeeping; accounting and auditing clerks; cargo and freight agents; dispatchers; couriers; data entry keyers; computer operators; shipping, receiving and traffic clerks; word processors and typists; proofreaders; desktop publishers; and general office clerks.
• **Craft Workers (formerly Craft Workers (Skilled))** - Most jobs in this category include higher skilled occupations in construction (building trades craft workers and their formal apprentices) and natural resource extraction workers. Examples of these types of positions include: boilermakers; brick and stone masons; carpenters; electricians; painters (both construction and maintenance); glaziers; pipe layers, plumbers, pipefitters and steamfitters; plasterers; roofers; elevator installers; earth drillers; derrick operators; oil and gas rotary drill operators; and blasters and explosive workers. This category also includes occupations related to the installation, maintenance and part replacement of equipment, machines and tools, such as: automotive mechanics; aircraft mechanics; and electric and electronic equipment repairers. This category also includes some production occupations that are distinguished by the high degree of skill and precision required to perform them, based on clearly defined task specifications, such as: millwrights; etchers and engravers; tool and die makers; and pattern makers.

• **Operatives (formerly Operatives (Semi-skilled))** - Most jobs in this category include intermediate skilled occupations and include workers who operate machines or factory-related processing equipment. Most of these occupations do not usually require more than several months of training. Examples include: textile machine workers; laundry and dry cleaning workers; photographic process workers; weaving machine operators; electrical and electronic equipment assemblers; semiconductor processors; testiners, graders and sorters; bakers; and butchers and other meat, poultry and fish processing workers. This category also includes occupations of generally intermediate skill levels that are concerned with operating and controlling equipment to facilitate the movement of people or materials, such as: bridge and lock tenders; truck, bus or taxi drivers; industrial truck and tractor (forklift) operators; parking lot attendants; sailors; conveyor operators; and hand packers and packagers.

• **Laborers and Helpers (formerly Laborers (Unskilled))** - Jobs in this category include workers with more limited skills who require only brief training to perform tasks that require little or no independent judgment. Examples include: production and construction worker helpers; vehicle and equipment cleaners; laborers; freight, stock and material movers; service station attendants; construction laborers; refuse and recyclable materials collectors; septic tank servicers; and sewer pipe cleaners.

• **Service Workers** - Jobs in this category include food service, cleaning service, personal service and protective service activities. Skill may be acquired through formal training, job-related training or direct experience. Examples of food service positions include: cooks; bartenders; and other food service workers. Examples of personal service positions include: medical assistants and other healthcare support positions; hairdressers; ushers; and transportation attendants. Examples of cleaning service positions include: cleaners; janitors; and porters. Examples of protective service positions include: transit and railroad police and fire fighters; guards; private detectives and investigators.