Executive Briefs

Women in foodservice metrics: what the participation figure HIDES

 By **Diego F. Parra** · Updated 2026-09-05 · Social Impact

QUICK VERDICT

Verdict: the women in foodservice metrics currently in circulation measure PRESENCE rather than TRAJECTORY, and that design flaw is what keeps the myth of an already-equitable sector alive. Mexico's hard number says 55.8% of restaurant employment is female (INEGI, 2022), and from there the leap is made to a solved problem; meanwhile 73% of women-led businesses cannot access the resources they need to grow (UNDP, 2024) and 57.8% of global employment remains informal (ILO, 2024), which means the demographic majority on the floor never converts into ownership, credit or command. For an investment officer the reading is blunt: a headcount indicator predicts nothing, whereas 12-month retention, promotion-to-supervisor ratio and contractual formalization do explain portfolio mortality. Recommendation: replace the count with a four-indicator trajectory dashboard before the next disbursement is signed.

A development bank approves an MSME line for foodservice and asks, as its gender safeguard, for a single number: the share of women employed. The figure comes back high, the committee applauds, the money moves. Eighteen months later the portfolio shows the same mortality as any other and not one beneficiary moved from operating to owning. The indicator was never mismeasured; it was misCHOSEN.

The sector is vast, which is precisely why the error scales: more than 270 million workers in tourism, hotels and restaurants, roughly 8.2% of the global labour force (ILO, 2024), and 357 million jobs sustained by tourism, one in ten worldwide (UN Tourism, 2024). When a participation metric is used as a proxy for equity across a universe that size, the bias does not dilute — it gets written into the terms of reference of dozens of programmes.

SATE Institute treats this as decision architecture, not rhetoric. The Twin Ecosystem Model separates two functions that usually blur together: the think tank sets the development agenda, runs M&E and answers for SDGs 8, 9 and 12; Masterestaurant S.A.S., technology ally and owner of the software, provides the instrumentation that captures operating data where it is generated — shift, payroll, prime cost, table turnover — without asking the operator to fill in a quarterly survey nobody audits.

Diego F. Parra presses an uncomfortable point: professional kitchens have spent decades claiming a meritocracy their own numbers do not support, and as long as the indicator stays at headcount, that claim remains unprovable in both directions. The Masterestaurant methodology resolves it through instrumentation — measure the path, not the snapshot — and that is the only route a credit committee can audit.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	SECTOR BASELINE (CITED SOURCE)	EXPECTED RESULT WITH INSTRUMENTATION AND M&E
Female share of restaurant employment (Mexico)	✕ 55.8% of sector employment (INEGI, 2022)	✓ Same 55.8% disaggregated across 4 hierarchy levels within 6 months
Capital access for women-led firms	✕ 73% without resources to grow (UNDP, 2024)	✓ 40% of the cohort holding an operating-scoring file at 12 months
Labour informality	✕ 57.8% of global employment is informal (ILO, 2024)	✓ ≥25 points of contractual formalization within the treated cohort
Sector employment base (US)	✕ 15.7 million jobs in 2026, 17.3 million projected by 2036 (National Restaurant Association, 2026)	✓ Local projection replicated with sex and revenue-band disaggregation
Market structure (Colombia)	✕ 95% are independent establishments (Acodrés, 2024)	✓ Open Badges micro-credentials issued to 60% of the independent cohort

	SECTOR BASELINE (CITED SOURCE)	EXPECTED RESULT WITH INSTRUMENTATION AND M&E
Food cost control as a credit-risk variable	✕ Optimal range 28–35% (National Restaurant Association)	✓ Food cost ≤32% sustained for 2 quarters as a renewal condition
Foodservice surplus food	✕ US$157 billion, 14% of sales (ReFED, 2024)	✓ Short supply chains measured across 3 nodes per territory (SDG 12.3)
Net jobs created by the sector	✕ 172,500 net new jobs in 2024 (National Restaurant Association, 2024)	✓ Programme-attributable jobs verified against payroll, not against survey

1. What does the 55.8% everyone quotes actually measure?

It measures presence on a shift, nothing more. INEGI (2022) reports that 55.8% of restaurant employment in Mexico is female against 44.2% male, and that figure, read alone, describes who was on the payroll the day of the survey;

it says nothing about who is still there twelve months later, who signs the payroll or who carries the lease risk. A credit committee that accepts such an indicator as a gender safeguard has bought a photograph while believing it bought a film. The ILO (2024) counts more than 270 million workers in tourism, hotels and restaurants, close to 8.2% of the global labour force, so the bias of a badly chosen indicator does not dilute itself in the volume: it multiplies with every terms-of-reference document that copies it. Here is the judgement, without detours: head-counting saturates, and that is why it helps so little.

2. The indicator was not badly measured, it was badly CHOSEN

Once female participation reaches 55.8% (INEGI, 2022), no margin remains to optimise and the programme loses its function; it has met its target before shifting a single career. Trajectory measurement opens four chained questions —how many enter, how many remain at twelve months, how many rise to shift or kitchen leadership, how many move from employee to owner— and each carries its own lever, cost and timeframe. Consider the counterfactual: had a programme demanded that fourth stage from the start, with 73% of women-led firms lacking access to growth capital (UNDP, 2024), the disbursement would have gone to working capital and guarantees rather than workshops; and the portfolio would be benchmarked against ownership, not attendance. For an operation below 500 thousand a year the decision is single and it is hard: nothing gets financed without a verifiable payroll. The ILO (2024) finds 57.8% of the world's workers still in informal employment, and in Colombia 95% of the gastronomy market consists of independent establishments according to Acodrés (2024), which is precisely the bracket where informality lives.

3. Under 500 thousand in annual revenue: formalisation tied to disbursement

The threshold I would set: 100% of kitchen and floor staff registered before the second tranche, plus documented food cost inside the 28-35% band the National Restaurant Association treats as operationally sound. This small bracket is NOT dropped from the programme for being expensive to audit; you lower its ticket and raise its verification frequency. Removing it means financing only those who could already finance themselves. In this bracket the governing metric is twelve-month permanence, and setting it at 70% retention of the female staff hired with the loan makes sense, measured against payroll rather than the owner's word. This is the stage where the business already bills but cannot yet absorb a full kitchen turnover without bleeding margin; with healthy food cost between 28% and 35% (National Restaurant Association), three consecutive departures on the hot line eat the quarter's profit through rework and overtime. Spanish hospitality closed 2024 with 1.84 million workers, 5.4% above 2023 (Hostelería de España, 2024), and that growth coexists with high churn: growing headcount and keeping people are two separate problems.

4. From 500 thousand to 1 million: month twelve settles the argument

Disbursement here must be tied to permanence, not to hiring. Above the million mark, demand promotions with a date and a job title. A reasonable threshold: at least one female promotion into middle management —sous chef, shift leader, purchasing manager— per million billed, recorded on payroll with the pay differential visible. Past 5 million the high-end profile appears, the one everybody recognises without needing a name: the media chef with her own brand, or the large-format themed venue with an investor partner, where the woman features in the communications and seldom on the share certificate. There the useful metric is equity participation, not the org chart. With 73% of women-led firms lacking growth capital (UNDP, 2024), the jump from operating to owning is the real bottleneck, and no employment figure detects it. A group billing above 10 million is no longer measured venue by venue but portfolio-wide, and female trajectory there reads as territory risk: an outlet in a high-churn district drags recruitment costs and learning curves that no participation metric reveals.

5. Above 10 million (group or chain): territory risk and portfolio

The market gives the scale of the problem: more than 1 million restaurant and foodservice locations in the United States (National Restaurant Association, 2025) and 15.7 million jobs in 2026, projected at 17.3 million by 2036. For this bracket the threshold is portfolio-level: 30% of unit management posts held by women and pay deviation per role under 5 points, audited quarterly. A group unable to produce that cut within 48 hours has no information system; it has a spreadsheet. Trajectory data is auditable only when captured where it is generated —shift, payroll, prime cost, table turnover— and not on a form the operator fills from memory three months later. That is the division of labour in the Twin Ecosystem Model: the think tank sets the agenda and M&E against SDGs 8, 9 and 12, while Masterestaurant S.A.S., as technology partner and owner of the software, supplies the instrumentation.

6. Instrument the data where it is born, not in a quarterly survey

Diego F. Parra puts it without diplomacy: professional kitchens have spent decades boasting a meritocracy their own numbers do not support, and as long as the indicator stays at head-counting that narrative stays unprovable in both directions. The Masterestaurant methodology measures the route, not the snapshot. A committee can audit that; a quarterly survey, it cannot. Change one line of the terms of reference before the next disbursement: replace «percentage of women employed» with four mandatory fields —hires, twelve-month permanence, promotions into management and equity participation— cut against payroll and the commercial registry. It costs little and it reorders everything else. Sector size justifies the effort: 357 million jobs sustained by tourism, one in ten on the planet according to UN Tourism (2024), and 27.4 million new posts created during 2024 across tourism and hospitality per the WTTC. At that scale, a badly chosen safeguard is not a methodological detail.

7. The concrete action for the next credit committee

It is a subsidy to inequality paid with development money, and eighteen months later nobody will know why the portfolio behaved exactly like any other. A headcount answers one closed question — how many are there — and therefore saturates fast: once 55.8% is reached (INEGI, 2022) there is nothing left to optimise and the programme loses its purpose. Trajectory opens four chained questions — how many enter, how many remain at twelve months, how many are promoted, how many move from employee to owner — and each carries its own operating lever, cost and timeline. Formalization stops being a declarative goal and becomes a disbursement condition verifiable against payroll. With 57.8% of global employment informal (ILO, 2024), a programme that does not tie a credit tranche to formalization is financing the very problem it claims to fight. Territory risk reads differently. A site in a high-turnover zone carries a replacement cost that conventional bank scoring never captures, and twelve-month female retention works as a proxy for operational stability long before the income statement reveals it.

8. What changes when the indicator moves from presence to trajectory?

Capital access stops depending on physical collateral. When the operation reports food cost, contribution margin and table turnover continuously, the scoring file is built out of performance;

that is precisely what the 73% currently locked out of financing (UNDP, 2024) cannot present today. The skills gap becomes auditable. Open Badges micro-credentials turn training into a portable asset a third party can verify, rather than an attendance certificate no bank accepts as evidence.

POINT BY POINT

Presence vs trajectory: the decision matrix

PREDICTIVE POWER OVER BUSINESS MORTALITY

A · SECTOR BASELINE (CITED SOURCE)

Participation counts do not correlate with unit survival

B · MASTERESTAURANT 12-month retention and food cost ≤32% anticipate deterioration ahead of the income statement

Verdict: Trajectory. A datum that predicts nothing cannot allocate capital.

COST OF CAPTURING THE DATA

A · SECTOR BASELINE (CITED SOURCE)

Self-reported quarterly survey, cheap to request and expensive to audit

B · MASTERESTAURANT Continuous capture from point of sale and payroll, at near-zero marginal cost per shift

Verdict: Instrumentation. Self-reported data fails operational due diligence.

USEFULNESS FOR CREDIT ACCESS

A · SECTOR BASELINE (CITED SOURCE)

Staff composition builds no bank file

B · MASTERESTAURANT An operating performance series substitutes collateral in MSME scoring

Verdict: Trajectory. It is the concrete route against the 73% locked out (UNDP, 2024).

ALIGNMENT WITH SDG 8 AND MULTILATERAL M&E

A · SECTOR BASELINE (CITED SOURCE)

Reports composition and saturates once parity is reached

B · MASTERESTAURANT Reports decent work, formalization and wage progression, with sustained headroom

Verdict: Trajectory. SDG 8 speaks of decent work, not headcount.

SCALABILITY ACROSS AN ATOMISED FABRIC

A · SECTOR BASELINE (CITED SOURCE)

Requires case-by-case management in a market that is 95% independent (Acodrés, 2024)

B · MASTERESTAURANT GovTech standardises capture and reporting across thousands of small units

Verdict: Instrumentation, provided the operator carries no additional workload.

REPUTATIONAL RISK TO THE PROGRAMME

A · SECTOR BASELINE (CITED SOURCE)

High: a parity figure without trajectory exposes the financier to window-dressing claims

B · MASTERESTAURANT

Low: every impact claim is verifiable against payroll and operating series

Verdict: Trajectory. Verifiability is the only risk mitigation that survives an audit.

SIDE-BY-SIDE COMPARISON

The opportunity (what an investment committee can capitalise on)

AVAILABLE EVIDENCE

- ✕ The sector already concentrates female labour: 55.8% of restaurant employment in Mexico is female (INEGI, 2022). Access does not need creating; the trajectory needs measuring.
- ✕ Volume justifies the instrumentation spend: over 270 million workers in tourism, hotels and restaurants, ≈8.2% of the global labour force (ILO, 2024).
- ✕ The bottleneck is identified and it is financial, not vocational: 73% of women-led firms lack the resources to grow (UNDP, 2024).
- ✕ The fabric is atomised, which is exactly what makes it addressable through GovTech: 95% of the Colombian market are independent establishments (Acodrés, 2024).
- ✕ Operating data already sits inside the point of sale and the payroll; today it is wasted because nobody structures it as credit evidence.

The myth behind the misallocation of capital MASTERESTAURANT

- ✓ Myth: if more than half the staff are women, the sector is equitable. Reality: participation measures entry, not retention or command.
- ✓ Myth: the problem is training. Reality: 73% of women-led firms report a lack of financial resources, not a lack of craft (UNDP, 2024).
- ✓ Myth: informality is a cultural trait of hospitality. Reality: it is 57.8% of global employment (ILO, 2024) and it responds to incentives and costs, which instruments can move.
- ✓ Myth: gender measurement makes the programme expensive. Reality: disaggregation runs on data the operation already produces every shift.
- ✓ Myth: social impact and unit economics compete. Reality: retention lowers replacement cost and protects prime cost, the variable that decides break-even.

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THE NUMBERS THAT MATTER

Indicators underpinning the thesis

55.8 %

of restaurant employment in Mexico is held by women

73 %

of women-led firms lack access to resources to grow

57.8 %

of global employment remains informal

270 M

workers in tourism, hotels and restaurants
(8.2% of the global labour force)

15.7 M

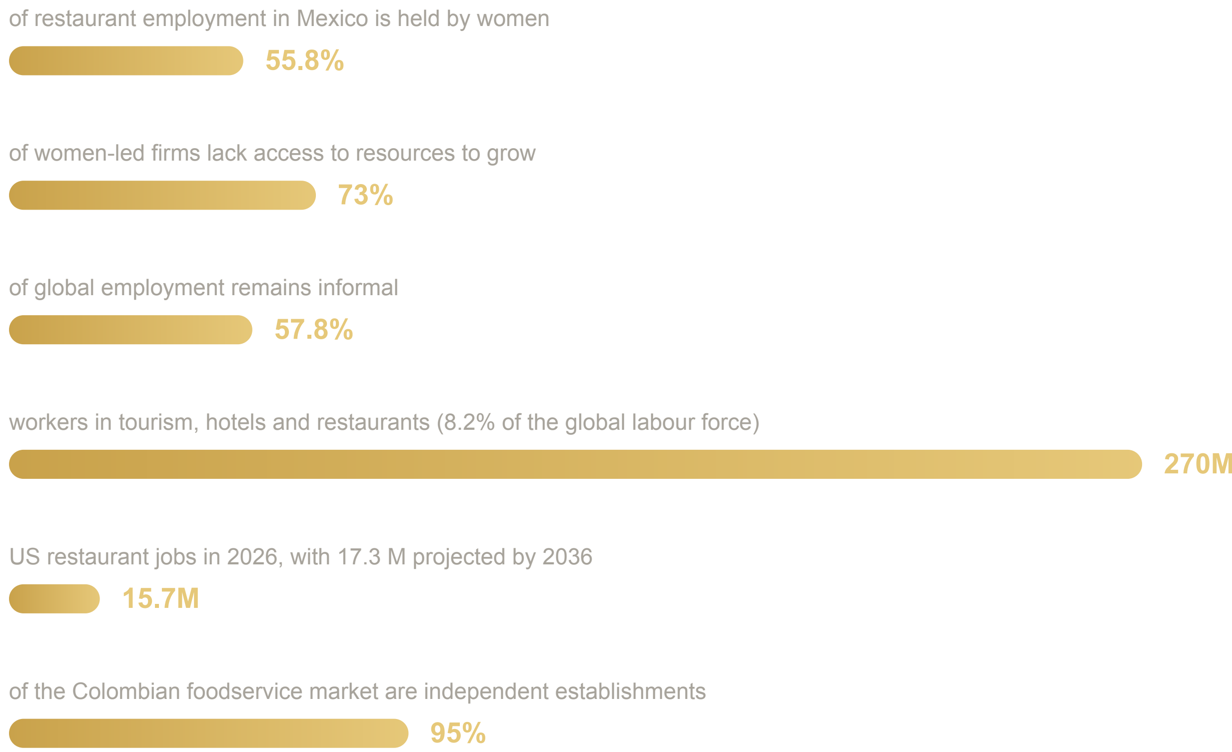
US restaurant jobs in 2026,
with 17.3 M projected by 2036

95 %

of the Colombian foodservice market
are independent establishments

VISUALIZATION

The numbers, visualized



Sources: INEGI 2022 · UNDP 2024 · ILO 2024 · National Restaurant Association 2026 · Acodrés (Revista La Barra) 2024

Chart by masterestaurant.com

REAL CASE

“We applied for a credit line arguing that 70% of our staff were women and they turned us down without discussion, because the bank could not verify any of it against a payroll. We instrumented the shift for two quarters and came back with a different file: twelve-month retention of 68%, food cost stabilised at 31% and contribution margin per dish documented week by week. The same institution approved the second location. What changed was not the impact narrative; it was that impact finally had an accounting trail.”

— Operator of a three-unit restaurant group in the USD 500K–1M annual revenue band, Colombia

HOW TO APPLY IT IN YOUR RESTAURANT

How is the dashboard implemented in 12 months?

1. **Phase 1 (months 0-3) · Disaggregated baseline**
   Deliverable: an operating census of the cohort disaggregated by sex, hierarchy level, contract type and annual revenue band — under USD 500K, 500K to 1M, above 1M, above 5M, above 10M for a group or chain. Instrumentation sits on the point of sale and payroll the operator already uses; nobody fills forms. Success metric: 100% of cohort units with a closed, audited baseline and ≥90% of hierarchy records complete. The contrast is drawn against the 55.8% female participation reported by INEGI (2022), which serves here as an external reference, not a target.

2. **Phase 2 (months 3-8) · Formalization and micro-credentials**
   Deliverable: a formalization pathway tied to disbursement tranches, plus Open Badges micro-credentials in costing, food cost variance control and menu engineering, issued by a verifiable third party. With 57.8% of global employment informal (ILO, 2024), this is the tranche where the programme stops being training and becomes youth employability policy for the sector. Success metric: +25 percentage points of formalization over baseline and ≥60% of the cohort holding at least one issued, validated credential.

3. **Phase 3 (months 8-12) · Operating scoring and capital access**
   Deliverable: a scoring file with a continuous series of food cost, prime cost, average ticket, table turnover and twelve-month retention, in a format commercial banks with MSME portfolios can consume. This attacks the 73% without access to resources documented by UNDP (2024): performance replaces collateral. Success metric: 40% of the cohort with a complete file submitted to at least one financial institution and food cost held at ≤32% across two consecutive quarters.

4. **Phase 4 (month 12 onward) · Short supply chains and territorial consolidation**
   Deliverable: a short supply chain map with at least three nodes per territory and surplus-food measurement, which in US foodservice reaches US$157 billion, 14% of sales (ReFED, 2024). Local economic development gets measured here, not in the rhetoric: documented local purchasing, reduced waste and sustained formal employment. Success metric: 3 active nodes per territory and verified waste reduction of at least 15% against the Phase 1 baseline.

FAQ

Questions from the investment committee

What does a female participation metric actually measure?

It measures entry into the sector and nothing else. The 55.8% female restaurant employment in Mexico (INEGI, 2022) confirms the door is open, but it says nothing about who remains at twelve months, who is promoted, or who ends up owning. For credit decisions that count carries no predictive power.

What does it cost NOT to instrument the portfolio?

It costs financing blind. With 73% of women-led firms lacking resources to grow (UNDP, 2024) and 57.8% of global employment informal (ILO, 2024), a programme without verifiable operating data cannot separate a viable beneficiary from one heading for closure, and that indistinction is paid in full through arrears.

Why does food cost appear on a gender dashboard?

Because cost control decides the survival of the very jobs the programme wants to protect. The optimal range is 28–35% per the National Restaurant Association, and Masterestaurant caps it at 32% per dish; above that the business eats its contribution margin and payroll is the first line cut.

How does this brief differ from a diversity report?

A diversity report states composition; this dashboard reports trajectory and links it to credit risk and SDG 8. The practical difference is that every indicator here carries a baseline cited to an external source, a timeline, a numeric success metric and a consequence for disbursement.

DATA & SOURCES

Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Mitigación de metano con compostaje y valorización de residuos de comida	**hasta 30% de reducción de metano**	Springer Nature — Green Technology Innovations for Carbon Footprint Reduction in the Restaurant Industry 2025
Trabajadores del turismo en la informalidad en América Latina	**52 de cada 100 trabajadores**	CEPAL — Panorama del turismo en México y América Latina 2024
Crecimiento del empleo informal femenino en América Latina 2024	**22,8% (vs. 15,7% en hombres)**	OIT/CEPAL — Panorama Laboral de América Latina y el Caribe 2024
Tasa de empleo informal entre mujeres en América Latina	**54,3%**	OIT/CEPAL — Panorama Laboral de América Latina y el Caribe 2024

Metric	Benchmark 2026	Source
Tasa de empleo informal entre jóvenes en América Latina	**62,4%**	OIT/CEPAL — Panorama Laboral de América Latina y el Caribe 2024
Tasa de empleo informal entre personas mayores en América Latina	**78%**	OIT/CEPAL — Panorama Laboral de América Latina y el Caribe 2024

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