

HOSPITALITY AND TOURISM



Maryland Department of Labor, Licensing and
Regulation
Division of Workforce Development
Office of Workforce Information and Performance
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May 2006

Hospitality & Tourism Cluster

What is included in the Hospitality & Tourism Cluster?

The Hospitality and Tourism Cluster is comprised of industries that provide services catering to business travelers, tourists, and local residents, encompassing accommodations, food service, travel arrangements, tours, convention planning, and various cultural, entertainment, and recreation-related activities. This report groups industries included in the Hospitality and Tourism Cluster into six divisions:

Scenic and Sightseeing Transportation consists of businesses that use different modes of transportation to provide recreation and entertainment. Transportation is usually local and involves same-day return to place of departure. Included are the industries of:

NAICS

- **4871** Scenic and sightseeing transportation, land (includes sightseeing buses, steam train trips, horse-drawn carriages)
- **4872** Scenic and sightseeing transportation, water (includes harbor tours, dinner cruises, charter fishing boat services)
- **4879** Scenic and sightseeing transportation, other (includes aerial tramways, hot air balloon rides, glider excursions)

Travel Arrangement and Reservation Services includes establishments that sell travel services, arrange and conduct tours, operate visitors bureaus, provide car rental services, and operate ticket sales or reservation agencies. Included is the industry of:

NAICS

- **5615** Travel arrangement and reservation services

Convention and Trade Show Organizers includes establishments that organize, promote, and/or manage events such as business and trade shows, conventions, conferences, and meetings. This industry consists of:

NAICS

- **56192** Convention and trade show organizers

Performing Arts, Spectator Sports, and Related Industries includes businesses that provide services to meet a variety of cultural, entertainment, and recreational interests of consumers. Comprising this group are establishments that produce, promote, or participate in live performances or events for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and businesses that operate facilities or provide services for recreational activities, amusements, and other leisure-time pursuits. Included are:

NAICS

- **7111** Performing arts companies
- **7112** Spectator sports

- **7113** Promoters of performing arts and sports
- **7114** Agents and managers for artists, athletes, entertainers, and other public figures
- **7115** Independent artists, writers, and performers
- **7121** Museums, historical sites, zoos, nature parks and gardens
- **7131** Amusement parks and arcades
- **7132** Gambling industries
- **7139** Other amusement and recreation industries

Accommodations consists of establishments that provide lodging for business travelers, vacationers and others. Some supply lodging only, while others also provide meals and entertainment or recreational facilities. Included in this group are:

NAICS

- **7211** Traveler accommodation (includes hotels, motels, bed and breakfast inns)
- **7212** RV parks and recreational camps (includes travel trailer/tent campgrounds, recreation/vacation camps)
- **7213** Rooming and boarding houses (includes fraternity/sorority houses, boarding houses for workers and others)

Food Services includes businesses that prepare and provide food and/or drink to patrons in a variety of settings. Comprising this industry group are:

NAICS

- **7221** Full-service restaurants (includes seated food and drink service)
- **7222** Limited-service eating places (includes fast food restaurants, delis, cafeterias, takeout eateries, pizza delivery)
- **7223** Special food services (includes food service contractors, caterers, mobile food services)
- **7224** Drinking establishments (includes bars and nightclubs that serve alcoholic beverages for immediate consumption)

For additional descriptive information on NAICS, go to www.census.gov/epcd/naics02/

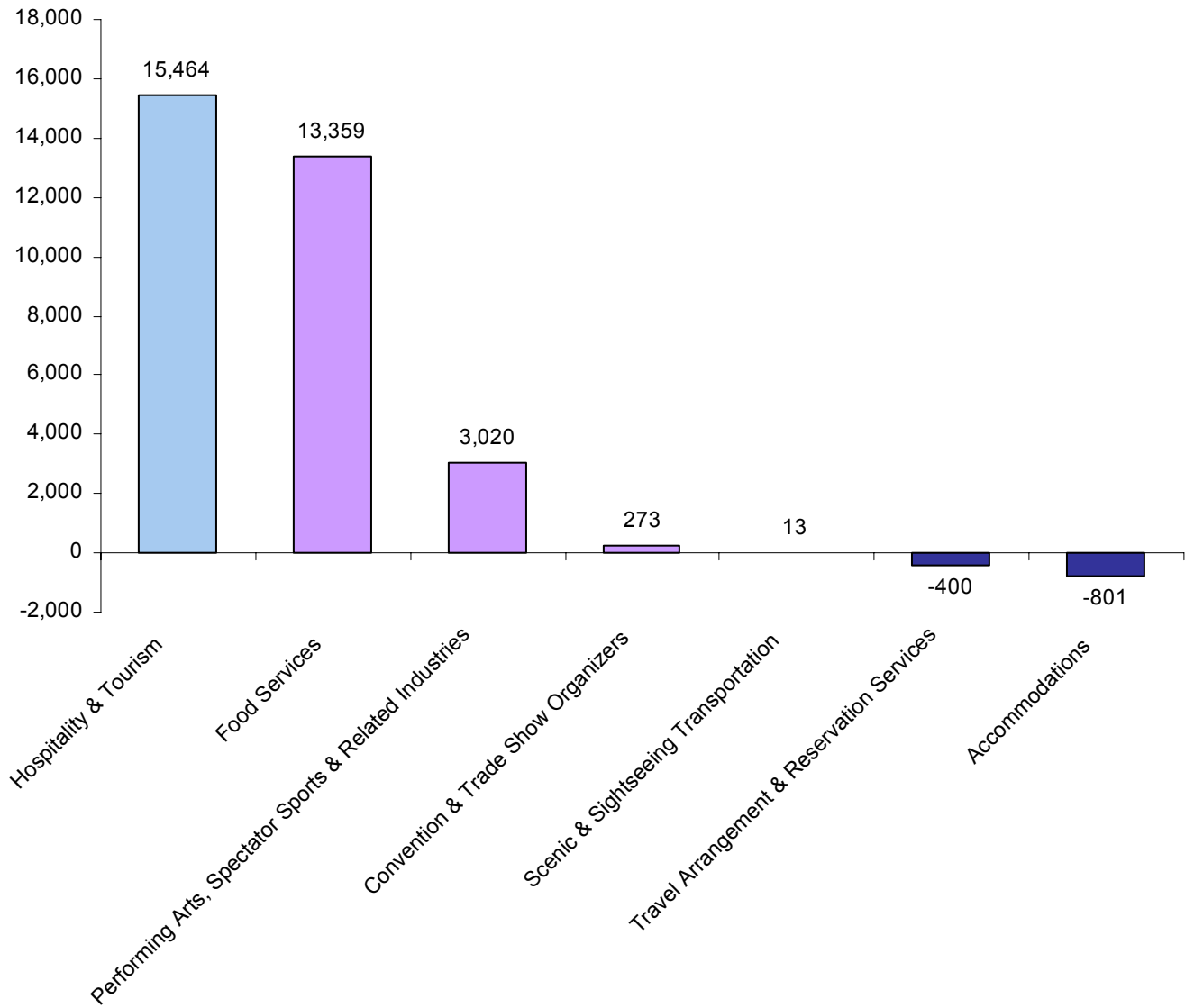
This publication was developed using data from the Quarterly Census of Employment and Wages (ES 202) and from the Occupational Employment Statistics (OES) Programs.

Maryland
Employment and Wages in the Hospitality and Tourism Cluster Industries
2001 - 2004
(Private Sector)

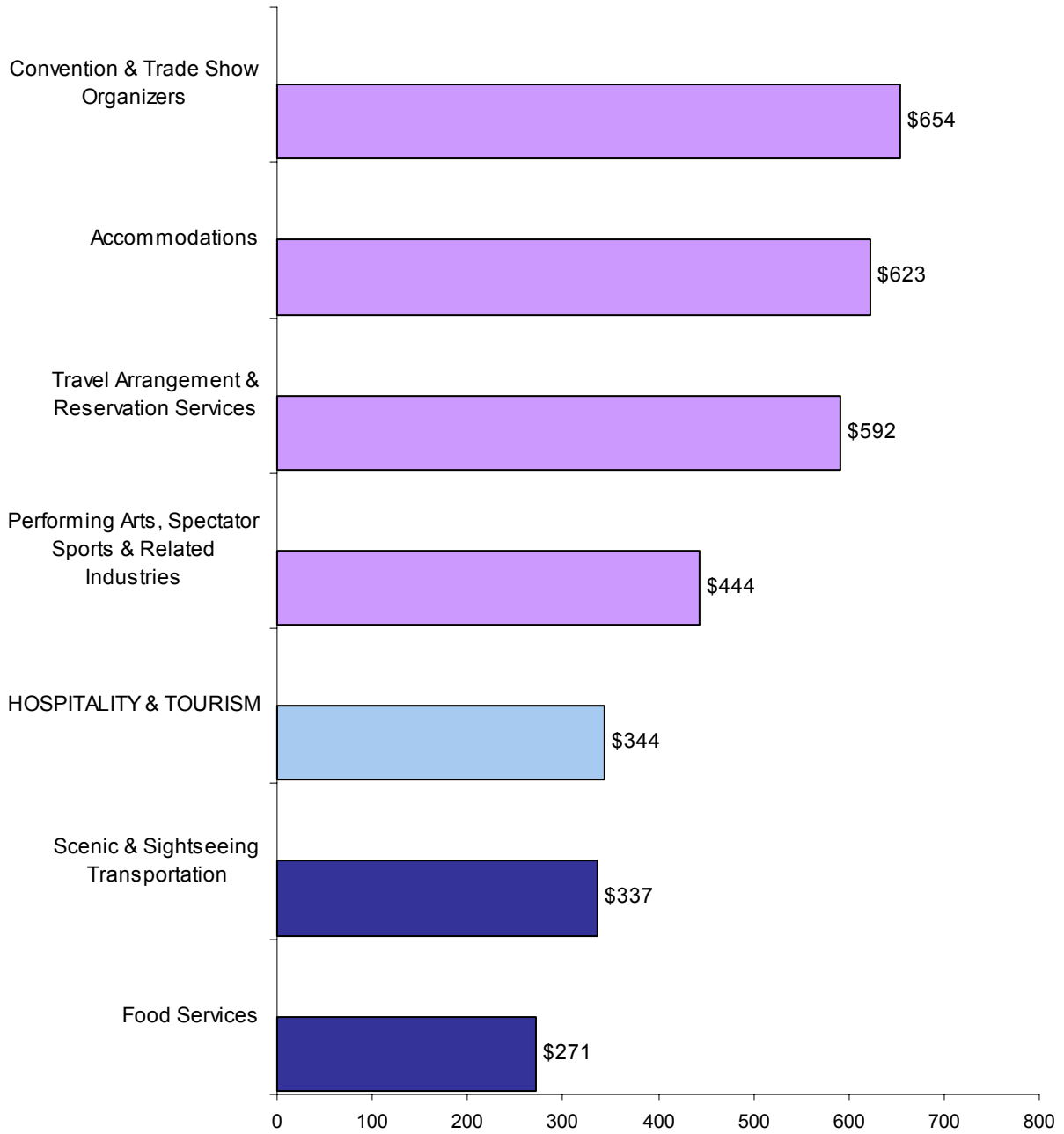
NAICS	Industry Description	Employment		Payroll		Average Weekly Wage 2004	Industry Share of Cluster
		2001	2004	2001	2004		
	Hospitality and Tourism	215,073	230,537	\$3,591,509,552	\$4,119,357,771	\$344	100.0
	Scenic & Sightseeing Transportation	337	350	5,690,137	6,132,883	337	0.2
4871 & 4872/4879	Scenic & sightseeing transp., land	51	49	862,499	759,468	298	0.0
	Scenic & sightseeing transp., water/other	286	301	4,827,638	5,373,415	343	0.2
5615	Travel Arrangement & Reservation Services	3,599	3,199	103,080,959	98,555,074	592	1.4
56192	Convention & Trade Show Organizers	1,905	2,178	68,996,725	74,050,447	654	0.9
	Performing Arts, Spectator Sports & Related Industries	32,544	35,564	727,141,637	820,466,898	444	15.4
7111	Performing arts companies	1,769	1,886	37,701,988	40,078,609	409	0.8
7112	Spectator sports	2,978	2,689	221,149,575	239,367,805	1,712	1.2
7113	Promoters of performing arts/sports	1,586	2,236	33,042,838	35,892,205	309	1.0
7114	Agents/managers for public figures	88	98	6,011,436	6,160,549	1,209	0.0
7115	Indep. artists, writers, performers	372	426	14,788,765	19,787,453	893	0.2
7121	Museums, historical sites, zoos, parks	1,948	1,795	42,749,576	44,934,628	481	0.8
7131	Amusement parks & arcades	1,290	1,421	16,979,003	17,102,488	231	0.6
7132	Gambling industries	464	404	7,026,540	5,974,989	284	0.2
7139	Other amusement & recreation industries	22,049	24,609	347,691,916	411,168,172	321	10.6
	Accommodations	25,651	24,850	716,995,970	805,301,192	623	10.8
7211	Traveler accommodation	24,840	24,027	702,374,458	788,353,505	631	10.4
7212	RV parks/recreational camps	704	752	12,875,622	15,614,772	399	0.4
7213	Rooming and boarding houses	107	71	1,745,890	1,332,915	361	0.0
	Food Services	151,037	164,396	1,969,604,124	2,314,851,277	271	71.3
7221	Full-service restaurants	71,439	77,847	965,501,968	1,137,167,276	281	33.8
7222	Limited-service eating places	62,268	69,246	713,085,064	870,570,902	242	30.0
7223	Special food services	11,618	11,450	221,997,061	228,403,487	384	5.0
7224	Drinking places (alcoholic beverages)	5,712	5,853	69,020,031	78,709,612	259	2.5

- Employment in the Hospitality and Tourism Cluster expanded at a rate of 7.2% between 2001 and 2004, a rate more than four times that for total private sector employment, resulting in a net increase of 15,464 jobs. Since 2001, growth in Cluster industry employment has proceeded without interruption even during the 2001 slowdown when declines were reported in total private sector employment. Currently, about one in every ten jobs in Maryland's private sector base are centered in Hospitality and Tourism industries.
- Just over 86% of the period's expansion resulted from rising employment in the Food Services subsector, an industry grouping in which about seven out of every ten Cluster jobs are based. Within the subsector, limited-service (fast food) eating places was the largest jobs producer.
- While Montgomery County holds the largest share of Cluster employment, with 39,404 jobs, followed by Baltimore County, with 31,499 jobs, both these jurisdictions reported negligible growth between 2001 and 2004. Job gains in Prince George's (3,397) and Anne Arundel counties (3,145) led the expansion.
- Overall, Hospitality and Tourism is not high-paying, averaging \$344 per week compared to the total private sector average of \$788. A number of factors contribute to this seeming disparity -- the high incidence of part-time employment in a number of Cluster industries, the presence of tipped positions such as waiter/waitresses (which often have salaries below minimum wage) and the large number of occupations where modest skill requirements yield modest hourly rates.

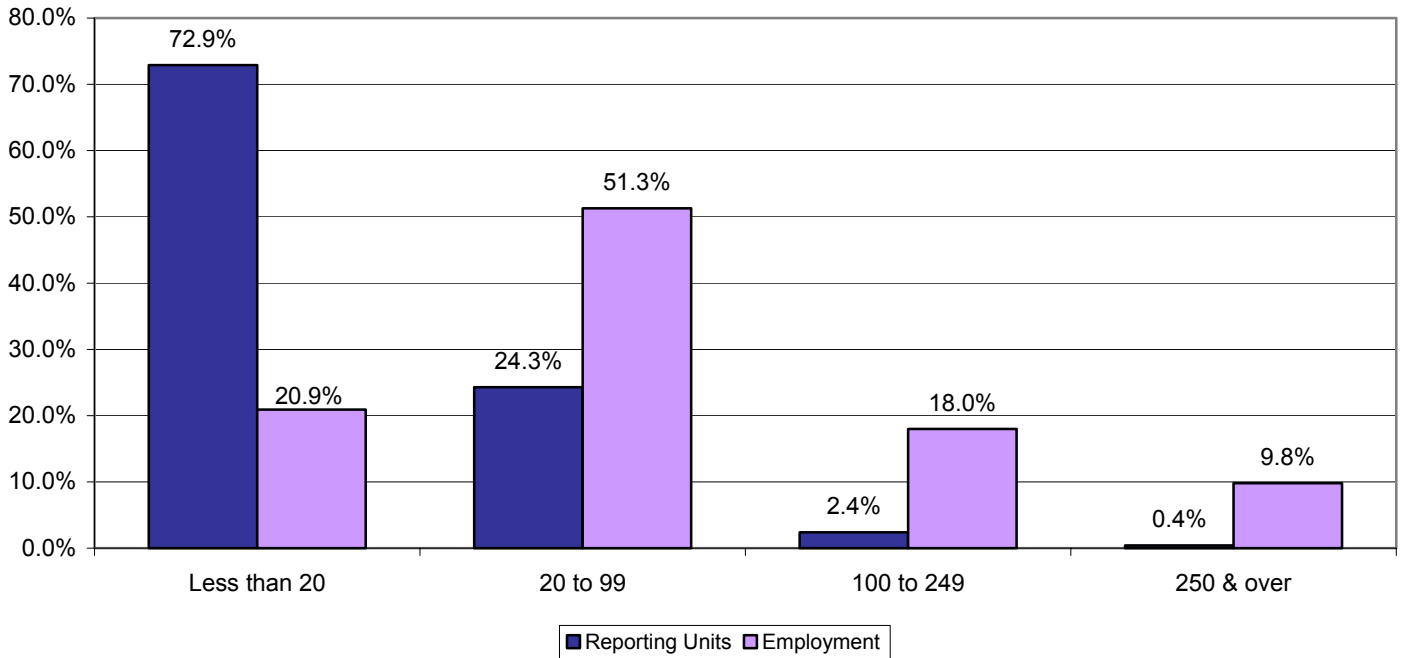
Maryland
Employment Changes in the Hospitality & Tourism Cluster Industry Subsectors
2001- 2004



Maryland
Wages in the Hospitality & Tourism Cluster Industry Subsectors
2004



**Reporting Units and Employment Concentration in the Hospitality & Tourism Cluster
by Size Class
Based on 3rd Quarter 2005 Average Employment**



	Reporting Units				Employment			
	Less than 20	20 to 99	100 to 249	250 & over	Less than 20	20 to 99	100 to 249	250 & over
Hospitality & Tourism Cluster	9,524	3,179	312	48	52,379	128,657	44,971	24,589
Percent of Total	72.9%	24.3%	2.4%	0.4%	20.9%	51.3%	18.0%	9.8%

- The Hospitality and Tourism Cluster is affected, to a large degree, by seasonality. Employment in the cluster normally peaks during the third quarter (July-August-September) of each year.
- Small employers, those with less than 20 employees, dominate the cluster, accounting for nearly three-fourths of all business establishments. Among the detailed industries within the cluster, limited-service eating places, a classification including delis, fast food restaurants, pizza delivery shops and the like, have the highest density of small business establishments. Full-service restaurants and other amusement and recreation, an industry class including businesses such as golf courses, country clubs, and exercise centers among others, hold the next highest shares of establishments in this size class.
- The largest worker concentration is found in those establishments employing between 20-99 persons -- a size class in which about 5 out of every 10 workers in the cluster industries are centered.
- The largest singular employer in the 250 & over size class -- businesses providing traveler accommodation -- are the source for about 30% of the 24,589 jobs in the stratification.

Maryland
Occupations in the Hospitality and Tourism Cluster

Occupation	Annual Openings			Training Code	Median Hrly/Annual Wage
	Growth *	Replacements *	Total *		
General & Operations Managers	1,420	1,230	2,650	4	38.75
Meeting and Convention Planners	25	25	50	5	19.50
Recreation Workers	120	145	265	5	11.75
Travel Agents	0	35	35	7	12.25
Food Service Managers	95	90	185	8	21.75
Lodging Managers	5	15	20	8	19.00
First Line Supvs./Mgrs. Of Food Prep/Serving Workers	280	375	655	8	14.00
First Line Supvs./Mgrs. Of Hsekeeping & Janitorial Wkrs.	145	130	275	8	15.25
Chefs and Head Cooks	55	80	135	8	17.00
Cooks, Restaurants	175	410	585	9	10.25
Bookkeeping, Accounting & Auditing Clerks	150	550	700	10	15.75
Secretaries, exc. Legal, Medical & Executive	230	835	1,065	10	14.50
General Office Clerks	695	1,165	1,860	11	12.25
Receptionists & Information Clerks	690	610	1,300	11	11.50
Hotel, Motel and Resort Desk Clerks	50	100	150	11	9.50
Baggage Porters and Bellhops	20	30	50	11	7.75
Reservation/Transp. Ticket Agts./Travel Clerks	40	40	80	11	12.50
Landscaping and Groundskeeping Workers	675	435	1,110	11	11.00
Janitors & Cleaners	1,165	745	1,910	11	9.00
Maids and Housekeeping Cleaners	245	440	685	11	9.00
Security Guards	760	490	1,250	11	10.75
Amusement and Recreation Attendants	130	115	245	11	NA
Cashiers	955	3,045	4,000	11	8.25
Ushers, Lobby Attendants and Ticket Takers	20	120	140	11	7.25
Hosts and Hostesses, Restaurant, Lounge, Coffee Shop	90	170	260	11	8.00
Bartenders	25	315	340	11	7.25
Dining Room, Cafeteria Attendants, Bartender Helpers	220	420	640	11	7.25
Food Servers, Nonrestaurant	60	120	180	11	9.25
Counter Attendants, Cafeteria, Food Conc., Coffee Shop	125	450	575	11	8.25
Cooks, Short Order	50	140	190	11	8.75
Cooks, Fast Food	30	245	275	11	7.75
Food Preparation Workers	415	480	895	11	8.75
Dishwashers	80	270	350	11	8.00
Waiters and Waitresses	685	1,965	2,650	11	6.75
Combined Food Preparation and Serving Workers	695	1,165	1,860	11	7.25

Note: Occupations are ranked by training code

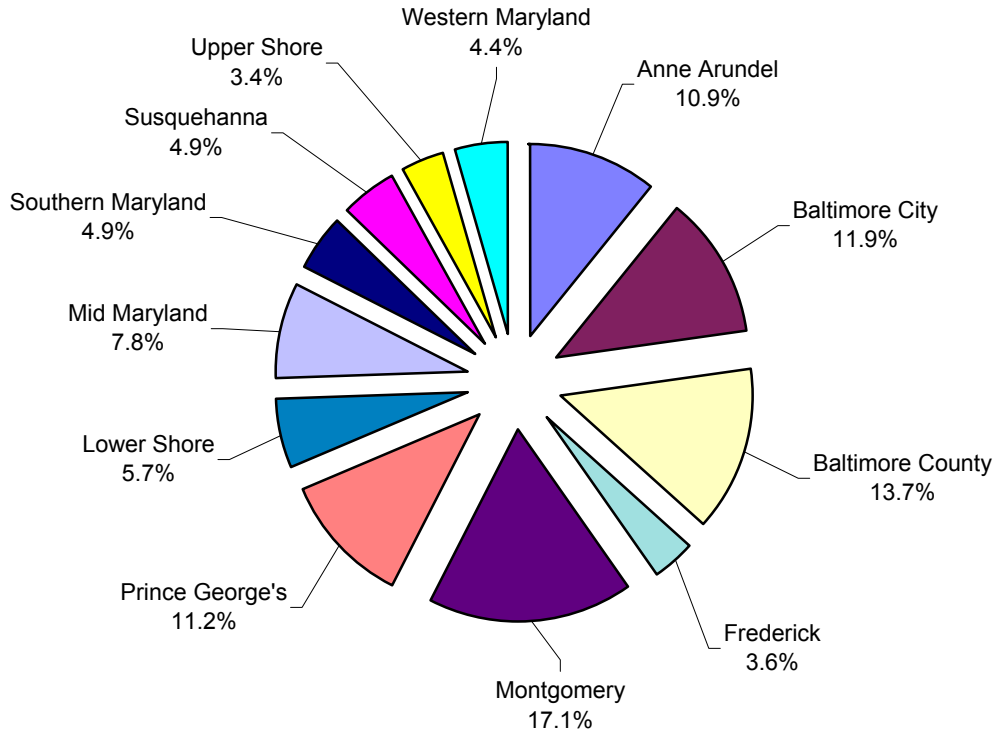
Estimates for Annual Openings, representing economy-wide demand for 2002-2012, are rounded to the nearest 5
Wages adjusted to reflect inflationary pressures through September 2005.

Education and Training Categories

Occupations are classified into 1 of 11 categories by the Bureau of Labor Statistics based on analyses of the occupation's usual education and training requirements conducted while developing information to present in the *Occupational Outlook Handbook*. The 11 classifications are as follows:

- 1** *First professional degree.* Completion of the academic program usually requires at least 6 years of full-time equivalent academic study, including college study prior to entering the professional degree program.
- 2** *Doctoral degree.* Completion of the degree program usually requires at least 3 years of full-time equivalent academic work beyond the bachelor's degree.
- 3** *Master's degree.* Completion of the degree program usually requires 1 or 2 years of full-time equivalent study beyond the bachelor's degree.
- 4** *Bachelor's or higher degree, plus work experience.* Most occupations in this category are managerial occupations that require experience in a related nonmanagerial position.
- 5** *Bachelor's degree.* Completion of the degree program generally requires at least 4 years but not more than 5 years of full-time equivalent academic work.
- 6** *Associate degree.* Completion of the degree program usually requires at least 2 years of full-time equivalent academic study.
- 7** *Postsecondary vocational award.* Some programs last only a few weeks while others may last more than a year. In some occupations, a license is needed that requires passing an examination after completion of the training.
- 8** *Work experience in a related occupation.* Some occupations requiring work experience are supervisory or managerial occupations.
- 9** *Long-term on-the-job training.* This category includes occupations that generally require more than 12 months of on-the-job training or combined work experience and formal classroom instruction for workers to develop the skills needed for average job performance. This category includes formal and informal apprenticeships that may last up to 4 years and short-term intensive employer-sponsored training that workers must successfully complete. Individuals undergoing training are generally considered to be employed in the occupation. This category includes occupations in which workers may gain experience in non-work activities, such as professional athletes who gain experience through participation in athletic programs in academic institutions.
- 10** *Moderate-term on-the-job training.* This category includes occupations in which workers can develop the skills needed for average job performance after 1 to 12 months of combined on-the-job experience and informal training.
- 11** *Short-term on-the-job training.* This category covers occupations in which workers can develop the skills needed for average job performance after a short demonstration or up to one month of on-the-job experience or instruction.

Hospitality and Tourism Cluster - 2004

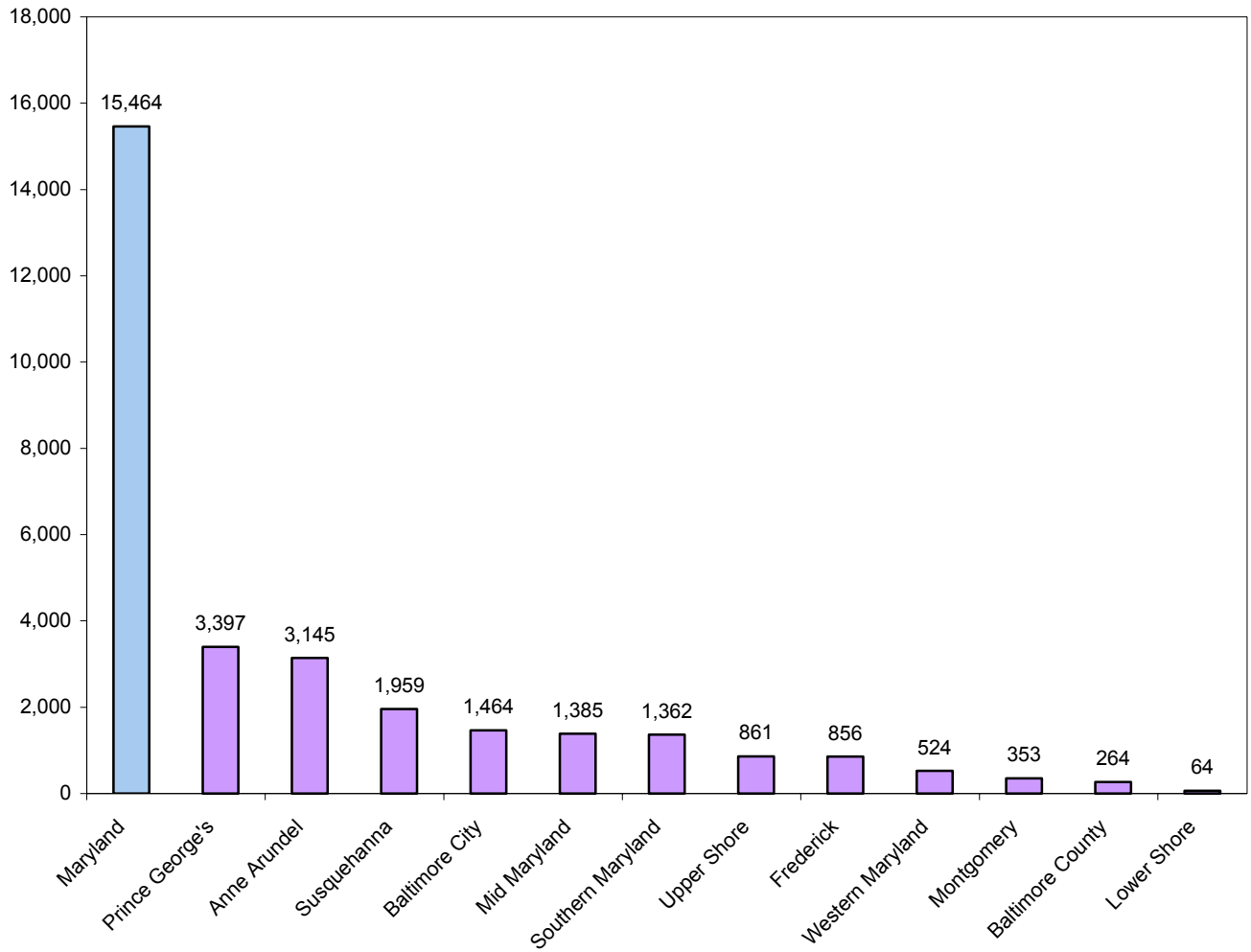


**Employment and Wages in the Hospitality & Tourism Cluster
By WIA and Select Local Jurisdictions**

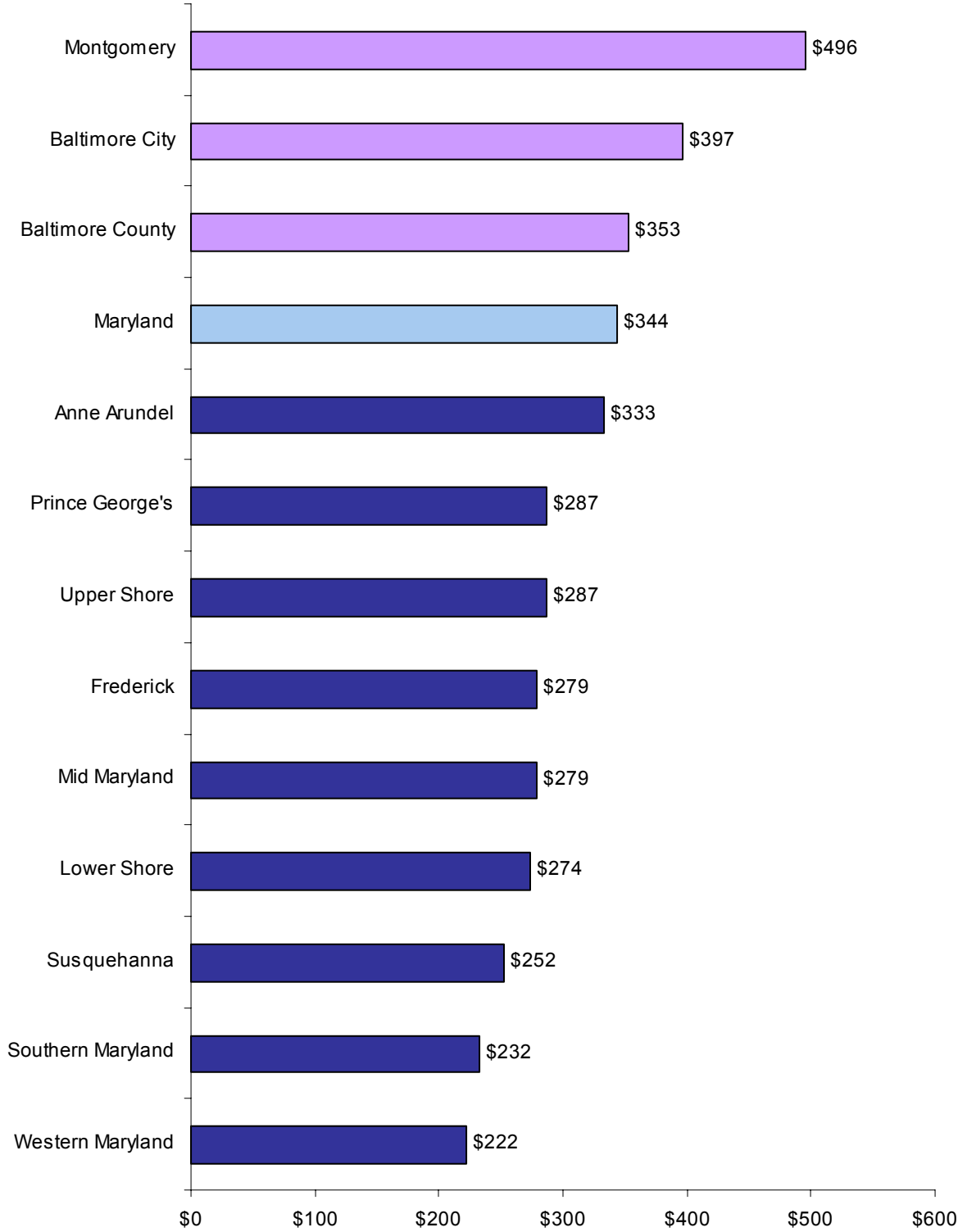
WIA	Employment		Employment Change 2001 - 2004	Number of Reporting Units 2004	Total Wages 2004	Average Weekly Wage 2004
	2001	2004				
Anne Arundel	22,029	25,174	3,145	1,244	\$436,120,652	\$333
Baltimore City	25,983	27,447	1,464	1,705	565,980,810	397
Baltimore County	31,235	31,499	264	1,784	578,008,530	353
Frederick	7,525	8,381	856	429	121,499,113	279
Montgomery	39,051	39,404	353	2,107	1,016,208,478	496
Prince George's	22,386	25,783	3,397	1,291	384,850,930	287
Lower Shore	13,176	13,240	64	735	188,893,133	274
Somerset	492	444	-48	41	4,204,916	182
Wicomico	3,704	3,969	265	218	46,397,803	225
Worcester	8,980	8,827	-153	476	138,290,414	301
Mid Maryland	16,718	18,103	1,385	856	262,334,864	279
Carroll	4,984	5,541	557	299	61,401,390	213
Howard	11,734	12,562	828	557	200,933,474	308
Southern Maryland	9,760	11,122	1,362	583	134,448,175	232
Calvert	2,506	2,886	380	156	34,281,211	228
Charles	4,580	5,053	473	259	64,246,317	245
St Mary's	2,674	3,183	509	168	35,920,647	217
Susquehanna	9,215	11,174	1,959	611	146,401,951	252
Cecil	2,769	3,347	578	211	50,061,142	288
Harford	6,446	7,827	1,381	400	96,340,809	237
Upper Shore	6,886	7,747	861	481	115,681,676	287
Caroline	412	532	120	47	5,520,692	200
Dorchester	880	1,282	402	60	21,331,050	320
Kent	1,220	1,135	-85	99	18,082,045	306
Queen Anne's	1,935	2,323	388	123	32,757,760	271
Talbot	2,439	2,475	36	152	37,990,129	295
Western Maryland	9,765	10,289	524	608	118,903,847	222
Allegany	3,347	3,268	-79	196	35,686,386	210
Garrett	1,353	1,451	98	90	16,815,732	223
Washington	5,065	5,570	505	322	66,401,729	229
Nondistributable*	1,344	1,174	-170	289	50,025,612	819
Maryland	215,073	230,537	15,464	12,723	4,119,357,771	344

* Includes establishments in all Hospitality & Tourism Cluster NAICS industries that cannot be distributed geographically.

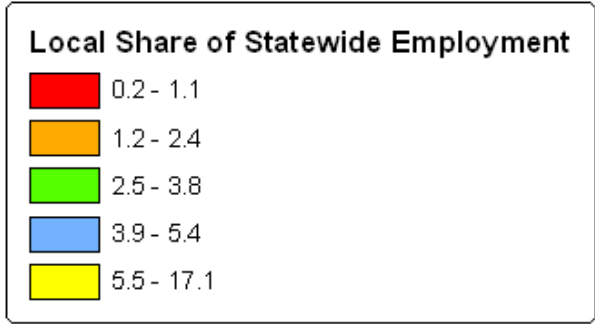
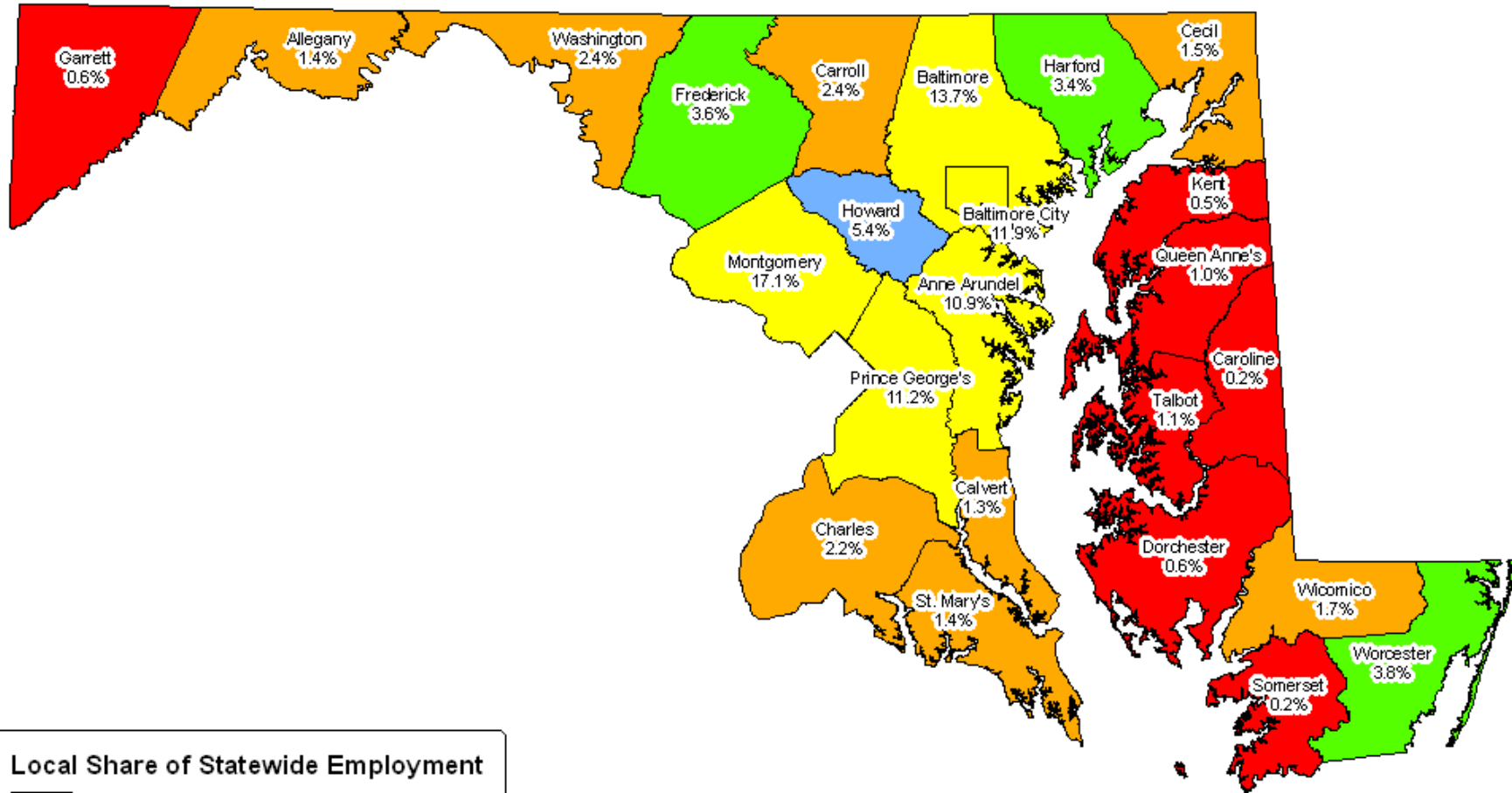
Employment Changes in the Hospitality & Tourism Cluster by WIA 2001 - 2004



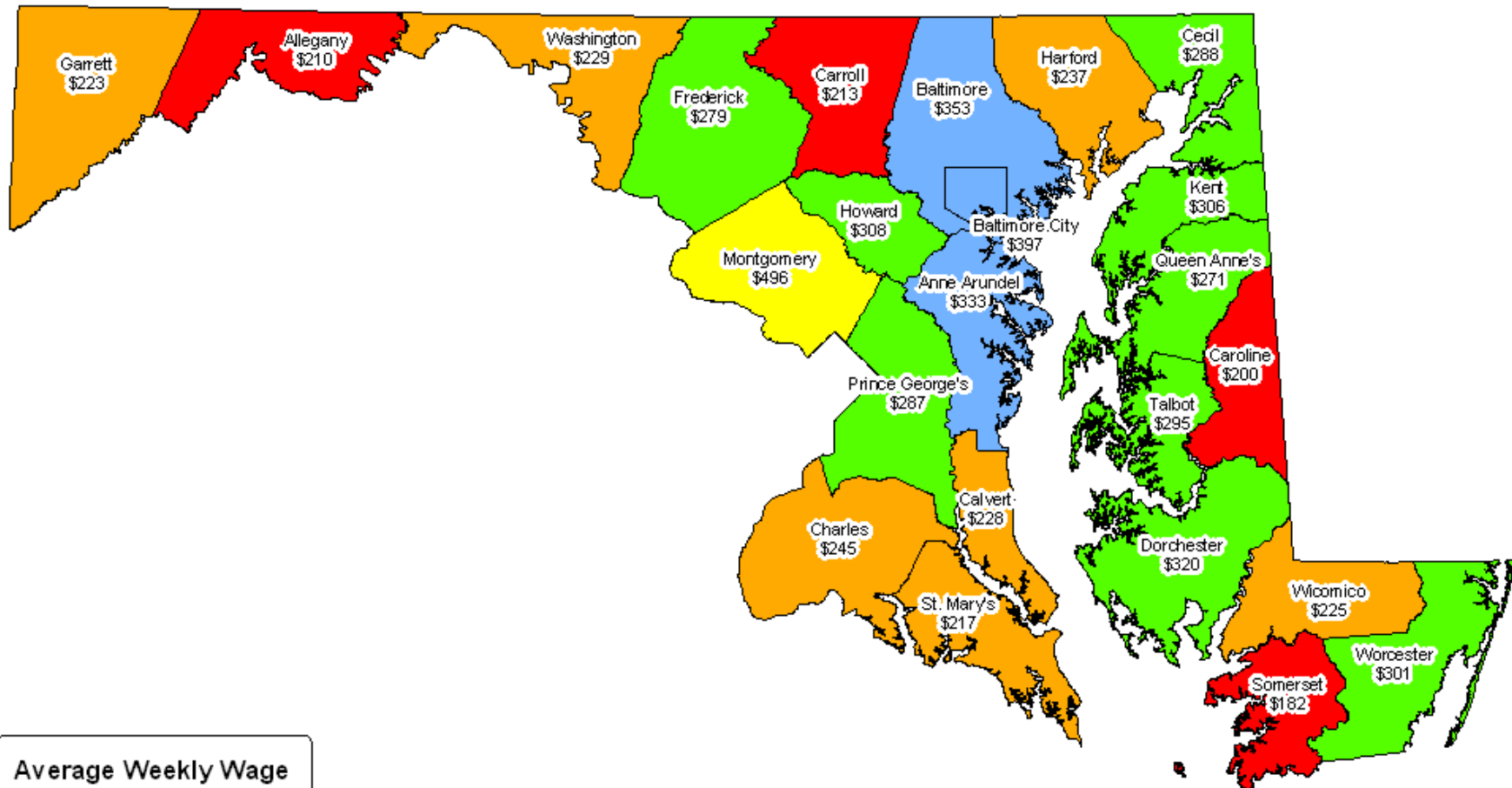
**Average Weekly Wages in the Hospitality & Tourism Cluster by WIA
2004**



Local Share of Statewide Employment in the Hospitality & Tourism Cluster 2004



Average Weekly Wage in the Hospitality & Tourism Cluster by Local Jurisdictions 2004



Average Weekly Wage

- \$182 - \$213
- \$214 - \$245
- \$246 - \$320
- \$321 - \$397
- \$398 - \$496

