Hospitality, Leisure & Entertainment

Pennsylvania defines industry clusters to serve as the basis for data-driven workforce development policies. An industry cluster includes industries closely linked by common products, labor pools, technologies, supplier chains and training needs. They take on strategic importance for long-term economic planning as changes that benefit one group member will generally impact other members of the cluster.

Industry clusters are comprised of specific six-digit North American Industry Classification System, or NAICS, codes. They are mutually exclusive, so that no two clusters contain the same NAICS code. Currently, there are 12 clusters identified, along with several critical sub-clusters. Combined, these 12 industry clusters account for nearly 83 percent of all employment in the commonwealth.

Cluster Summary

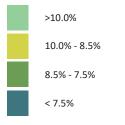
The Hospitality, Leisure & Entertainment (HLE) cluster is comprised of industries that cater to tourism and recreation throughout the commonwealth. In addition to hotels and restaurants, this cluster includes casinos, golf courses, museums, racetracks, bowling centers and caterers. Many industries in this cluster are seasonal with part-time or tip-based employment. For that reason, wages are lower than other clusters and employment is much more volatile if analyzed on a quarterly basis.

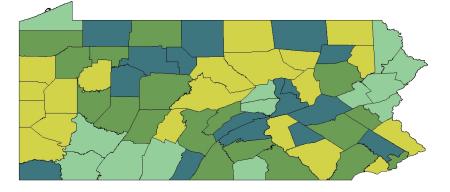
	2015	2019	2020
Employer Units	37,111	38,207	37,879
Number of Jobs	596,385	623,645	458,257
Percent of Total Pennsylvania Jobs	10.5%	10.5%	8.3%
Average Annual Wages	\$20,120	\$22,418	\$23,530
Location Quotient (LQ)	0.87	0.85	0.82
LQs greater than one suggest a con	npetitive advar	ntage.	

Cluster employment has greatly decreased in Pennsylvania (23.0%) over the last five years. The state still maintains a Location Quotient (LQ) well below one, and most Workforce Development Areas (WDAs) have seen very little change in their own LQ (as seen on page 3). While wages have increased (17.0%), the cluster still pays well below the statewide average for all jobs (\$62,070).

Note: The 2020 employment and wages data, as presented in this publication, reflect the effects of business and school closures implemented to mitigate the spread of Coronavirus (COVID-19).

Percent Employment by County





Major Employers

- GMRI Inc.
- Starbucks Corporation
- McDonalds
- Eat'n Park Hospitality Group
- Hershey Entertainment & Resorts Co.
- Texas Roadhouse Management Corp.



Top Industries Based on Employment

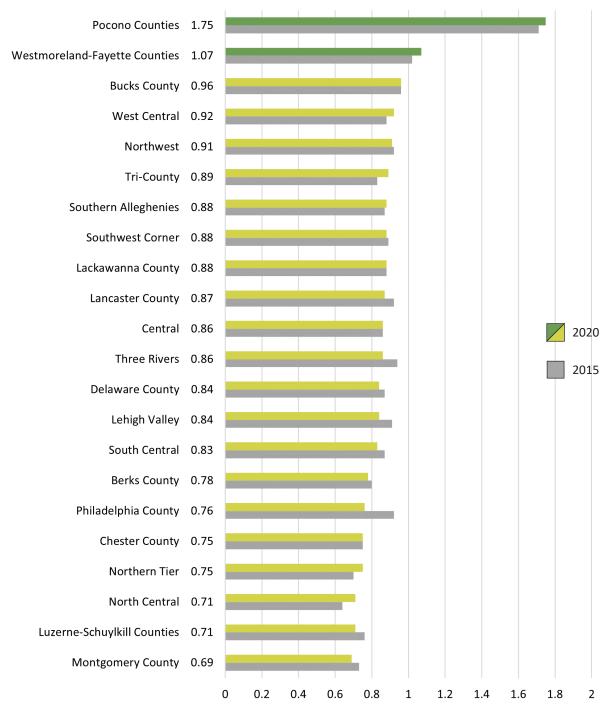
- Full-Service Restaurants
- Limited-Service Restaurants
- Hotels & Motels, Except Casino Hotels
- Snack & Nonalcoholic Beverage Bars
- Food Service Contractors
- Fitness & Recreational Sports Centers
- Golf Courses & Country Clubs
- Drinking Places, Alcoholic Beverages
- Sporting Goods Stores
- All Other Amusement & Recreation Industries

- Casinos, Except Casino Hotels
- Gift, Novelty & Souvenir Stores
- Museums
- Amusement & Theme Parks
- Caterers
- Sports & Recreation Instruction
- Casino Hotels
- Sports Teams & Clubs
- Hobby, Toy & Game Stores
- Promoters With Facilities

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Employment Concentration

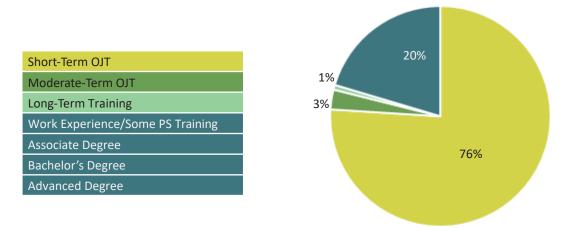
A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. Only the Pocono Counties and Westmoreland-Fayette Counties WDAs have an LQ greater than one and are more competitive since 2015.



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Educational Requirements

This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. Approximately 76 percent of HLE jobs require less than three months of on-the-job training to enter employment. The lower educational attainment levels make gaining employment easier, but leads to increased turnover and lower wages.



Occupations with Significant Employment

The following table lists occupations that employ at least 8,200 people in the HLE cluster.

			Annual Demand		
SOC Code	Occupation	Average Wage	All Industries	Industry Cluster	
35-3021	Combined Food Preparation & Serving Workers	\$22,800	31,240	26,062	
35-3031	Waiters & Waitresses	\$26,270	19,760	18,872	
35-2014	Cooks, Restaurant	\$27,570	9,641	9,228	
35-3011	Bartenders	\$25,930	6,042	4,762	
35-1012	Supervisors - Food Preparation & Serving Workers	\$40,570	5,479	4,414	
35-9031	Hosts & Hostesses, Restaurant/Lounge/Coffee Shop	\$21,810	4,012	3,865	
35-9021	Dishwashers	\$23,230	3,678	3,196	
35-9011	Dining Room & Cafeteria Attendants & Helpers	\$21,960	2,934	2,598	
41-2031	Retail Salespersons	\$29,580	24,101	2,378	
39-3091	Amusement & Recreation Attendants	\$21,820	2,528	2,321	
41-2011	Cashiers	\$23,070	26,204	2,065	
37-2012	Maids & Housekeeping Cleaners	\$26,800	7,051	1,876	
35-2021	Food Preparation Workers	\$24,410	3,889	1,661	
43-4081	Hotel, Motel & Resort Desk Clerks	\$24,510	1,429	1,422	
35-2011	Cooks, Fast Food	\$20,960	1,032	1,027	

*The 2020 average annual wage reflects wages across all industries and is not specific to the cluster.

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