

HOSPITALITY & TOURISM

Employment in Tampa Bay MSA's Hospitality & Tourism sector has increased by more than 24 percent since 2007, outpacing the nation by more than 6 percentage points over the decade and lagging only slightly behind state levels.

The Hospitality & Tourism employs roughly 155,000 workers across nearly 7,700 establishments. The primary subsectors include:

- NAICS 722: Food Services and Drinking Places (with 109,860 jobs in 2017)
- NAICS 713: Amusement, Gambling, and Recreation Industries (18,454 jobs)
- NAICS 721: Accommodation (16,867 jobs)
- NAICS 711: Performing Arts, Spectator Sports, and Related Industries (9,088 jobs)
- NAICS 712: Museums, Historical Sites, and Similar Institutions (1,339 jobs)

FIGURE 1. OVERVIEW: HOSPITALITY & TOURISM

DEFINITION: The sector as defined includes establishments that operate a variety of entertainment and recreation facilities and those that provide lodging and prepare food and beverages for immediate consumption.



155,608

Jobs in Tampa Bay MSA, 2017



+24.3%

Employment change (%) past 10 years



\$28,048

Average earnings per job, 2017*



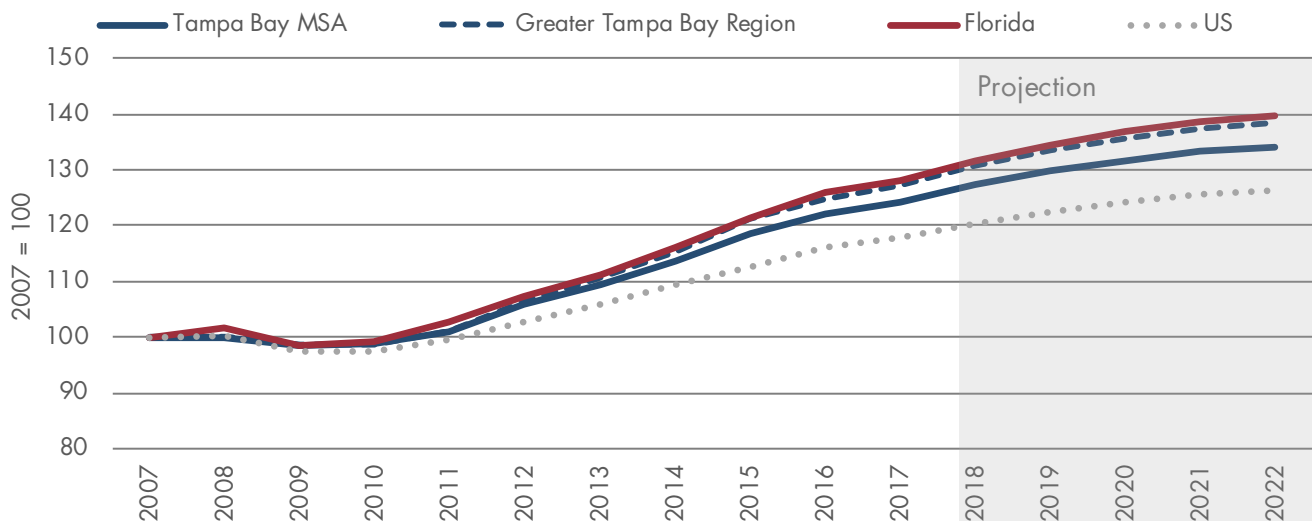
7,688

Payrolled business locations, 2017

CLASSIFICATION USED FOR ANALYSIS:

NAICS 71 Arts, Entertainment, and Recreation
NAICS 72 Accommodation and Food Services

FIGURE 2. EMPLOYMENT TRENDS (HISTORIC & PROJECTED): HOSPITALITY & TOURISM
JOB CHANGE RELATIVE TO 2007, WITH COMPARISONS TO TOTAL EMPLOYMENT AND US TRENDS



Source(s): All figures, Emsi 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Note(s): *Average earnings per job is the total industry earnings for a region divided by number of jobs. It includes wages, salaries, supplements (additional employee benefits), and proprietor income. It is not equivalent to compensation paid directly to workers.

MAJOR EMPLOYERS. Hotels and resorts are a major source of Hospitality & Tourism employment in the region and are one of the subsectors that has the clearest link to visitors. The Saddlebrook Resort in Tampa is the MSA's largest in terms of the number of rooms, followed closely by TradeWinds Island Resort, each with approximately 800 guest rooms. Of the 24 facilities profiled, only five have been built since the year 2000.



FIGURE 3. LARGEST HOTELS & RESORTS IN TAMPA BAY MSA
RANKED BY NUMBER OF ROOMS

BUSINESS NAME	CITY	NUMBER OF ROOMS	YEAR BUILT	SQ. FT. OF MEETING SPACE
Saddlebrook Resort - Tampa	Wesley Chapel	800	1981	95,000
TradeWinds Island Resorts	St. Pete Beach	796	1986	71,000
Tampa Marriott Waterside Hotel and Marina	Tampa	719	2000	50,000
Innisbrook, a Salamander Golf & Spa Resort	Palm Harbor	610	1971	65,000
Hilton Tampa Downtown	Tampa	520	1982	30,000
DoubleTree by Hilton Hotel Tampa Airport Westshore	Tampa	489	1974	16,000
Grand Hyatt Tampa Bay	Tampa	442	1986	22,000
Hilton Clearwater Beach Resort	Clearwater Beach	418	1980	40,000
Sheraton Sand Key Resort	Clearwater Beach	390	1975	24,000
Sirata Beach Resort	St. Pete Beach	382	1999	30,000
Vinoy Renaissance St. Petersburg Resort & Golf Club	St. Petersburg	361	1925	60,505
Embassy Suites Tampa Downtown Convention Center	Tampa	360	2006	9,000
Wyndham Grand Clearwater Beach Resort ⁽¹⁾	Clearwater	343	2017	22,000
Hilton St. Petersburg Bayfront	St. Petersburg	333	1973	30,000
Barrymore Hotel Tampa Riverwalk	Tampa	332	1971	6,000
The Westshore Grand	Tampa	325	1984	14,000
Tampa Marriott Westshore	Tampa	310	1979	19,680
Westin Tampa Harbour Island Hotel	Tampa	299	1987	18,032
Tampa Airport Marriott	Tampa	298	1971	25,310
Renaissance Tampa International Plaza Hotel	Tampa	293	2004	17,040
Don CeSar Hotel	St. Pete Beach	277	1928	22,000
Sheraton Tampa Riverwalk Hotel	Tampa	277	1968	10,771
Crowne Plaza Tampa Westshore	Tampa	266	2009	9,000
Sheraton Tampa Brandon Hotel	Tampa	266	1987	30,000

Source: Excerpted from "Largest Hotels and Resorts in Tampa Bay," *Tampa Bay Business Journal*, January 26, 2018. (Only facilities in Hernando, Hillsborough, Pasco, and Pinellas counties are shown.) Note(s): Data is from hotel websites and the Florida Department of Business and Professional Regulation. (1) The resort includes 105 vacation ownership units in addition to the rooms shown,

STAFFING AND HIGH-DEMAND OCCUPATIONS. Figure 4 shows which occupations hold the highest share of employment in the Hospitality & Tourism industry overall and by subsector. Figure 5 shows demand factors for the 45 occupations with the highest share of industry employment.

FIGURE 4. TOP 30 OCCUPATIONS: HOSPITALITY & TOURISM SECTOR (NAICS 71 & 72) & SELECTED SUBSECTORS

PERCENT OF TOTAL JOBS IN INDUSTRY

HDOS	SOC CODE	DESCRIPTION	PERCENT OF TOTAL JOBS IN INDUSTRY				
			Arts, Entmt. and Recreation 71	Accomm. and Food Services 72	Amusement, Gambling, and Recreation 713	Accommodation 721	Food Svcs. and Drinking Places 722
	39-3091	Amusement & Recreation Attendants	10.5%	0.1%	15.0%	0.5%	0.0%
	39-9031	Fitness Trainers & Aerobics Instructors	7.9%	0.0%	12.0%	0.1%	0.0%
	35-3031	Waiters & Waitresses	3.9%	21.5%	5.4%	7.4%	23.4%
	37-3011	Landscaping & Groundskeeping Workers	3.6%	0.1%	5.1%	1.0%	0.0%
	41-2011	Cashiers	2.6%	2.4%	2.7%	0.5%	2.7%
	27-2042	Musicians & Singers	2.5%	0.0%	0.0%	0.0%	0.0%
	27-2099	Entertainers, Sports & Related, All Other	2.0%	0.0%	0.6%	0.1%	0.0%
▶	33-9032	Security Guards	2.0%	0.4%	0.9%	1.2%	0.3%
	43-4051	Customer Service Representatives	2.0%	0.2%	1.9%	0.6%	0.1%
▶	49-9071	Maintenance & Repair Workers, General	1.9%	0.7%	2.2%	5.3%	0.1%
▶	35-3011	Bartenders	1.8%	4.6%	2.3%	2.3%	4.9%
	35-3022	Counter Attendants, Cafeteria, & Concession	1.8%	2.8%	2.0%	0.6%	3.1%
▶	43-4171	Receptionists & Information Clerks	1.7%	0.0%	2.4%	0.2%	0.0%
▶	41-2031	Retail Salespersons	1.7%	0.1%	2.1%	0.3%	0.1%
	39-9032	Recreation Workers	1.7%	0.1%	2.4%	0.7%	0.0%
	39-3031	Ushers, Lobby Attendants, & Ticket Takers	1.6%	0.0%	0.4%	0.1%	0.0%
▶	37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	1.6%	0.4%	1.8%	1.2%	0.3%
	33-9092	Other Rec. Protective Service Workers	1.5%	0.0%	2.3%	0.2%	0.0%
	39-1021	First-Line Supvsr., Personal Svc. Workers	1.5%	0.0%	2.0%	0.3%	0.0%
	35-2014	Cooks, Restaurant	1.3%	9.7%	1.9%	3.2%	10.6%
▶	11-1021	General & Operations Managers	1.2%	0.4%	1.2%	0.6%	0.4%
▶	43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	1.2%	0.1%	0.8%	0.5%	0.1%
	35-3021	Combined Food Prep. & Servers, Incl. Fast Food	1.2%	22.0%	1.6%	1.0%	24.9%
	41-3099	Sales Reps., Services, All Other	1.1%	0.2%	1.2%	1.3%	0.0%
	41-2021	Counter & Rental Clerks	0.8%	0.0%	1.3%	0.1%	0.0%
▶	43-3031	Bookkeeping, Accounting, & Auditing Clerks	0.8%	0.3%	0.7%	1.0%	0.2%
	35-9011	Attendants & Bartender Helpers	0.7%	2.7%	1.0%	2.1%	2.8%
▶	35-1012	First-Line Supvsr., Food Prep. & Servers	0.6%	5.6%	0.8%	1.4%	6.2%
	35-9021	Dishwashers	0.6%	3.3%	0.9%	1.3%	3.5%
▶	37-2012	Maids & Housekeepers	0.6%	3.4%	0.9%	27.5%	0.0%

Source: Emsi 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed. High-demand occupations (HDOs) are those occupations that are expected to experience high pressure in three or more demand factors: new job growth, replacement demand, retirement exposure, or relative wages.

FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: HOSPITALITY & TOURISM

SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
LOW-SKILL (High school or less)							
41-2031	Retail Salespersons	45,009	36,071	2,895	0.42	16%	9%
43-4051	Customer Service Representatives	48,113	35,613	4,046	0.69	14%	4%
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	33,332	34,615	3,058	0.96	9%	4%
41-2011	Cashiers	31,148	30,911	1,291	0.72	12%	6%
35-3031	Waiters & Waitresses	28,516	29,178	1,670	0.96	6%	2%
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	26,624	15,195	815	0.75	25% ◀	10% ◀
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	17,306	12,192	752	0.77	22% ◀	10% ◀
37-2012	Maids & Housekeepers	14,983	11,317	1,208	0.66	21% ◀	7%
43-4171	Receptionists & Information Clerks	12,626	9,263	848	0.77	18%	10% ◀
33-9032	Security Guards	12,102	8,698	620	0.79	20%	13% ◀
35-2021	Food Preparation Workers	8,826	8,174	564	1.01	12%	5%
37-3011	Landscaping & Groundskeeping Workers	12,175	8,019	604	0.77	18%	7%
35-3011	Bartenders	7,525	7,120	706	1.23	8%	4%
35-3022	Counter Attendants, Cafeteria, & Concession	5,813	6,824	368	0.94	7%	4%
35-9031	Hosts & Hostesses	3,850	4,791	289	0.96	6%	6%
39-3091	Amusement & Recreation Attendants	3,738	4,503	197	0.87	11%	14% ◀
35-9021	Dishwashers	5,102	4,163	144	0.98	13%	7%
35-9011	Attendants & Bartender Helpers	3,803	3,614	293	0.93	10%	5%
39-9031	Fitness Trainers & Aerobics Instructors	3,369	3,066	194	1.50	12%	6%
41-2021	Counter & Rental Clerks	4,445	3,021	166	1.13	14%	9%
39-9032	Recreation Workers	3,225	2,908	179	0.84	16%	7%
53-3031	Driver/Sales Workers	4,207	2,527	248	0.65	17%	7%
35-3041	Food Servers, Nonrestaurant	2,258	1,988	253	0.95	15%	7%
43-4081	Hotel, Motel, & Resort Desk Clerks	2,174	1,885	152	0.70	12%	6%
51-6011	Laundry & Dry-Cleaning Workers	2,542	1,703	-40	0.95	22% ◀	8%
39-3031	Ushers, Lobby Attendants, & Ticket Takers	1,279	1,678	75	1.01	16%	25% ◀
35-2011	Cooks, Fast Food	2,186	1,651	66	0.60	9%	3%
35-2015	Cooks, Short Order	1,951	1,438	50	1.14	10%	3%
33-9092	Other Rec. Protective Service Workers	724	940	37	0.75	6%	5%
39-6011	Baggage Porters & Bellhops	1,102	793	29	0.69	19%	9%
27-2099	Entertainers, Sports & Related, All Other	674	386	21	0.87	9%	5%
35-9099	Food Prep. & Servers, All Other	387	380	38	0.57	11%	6%

Continued next page

Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: HOSPITALITY & TOURISM (CONTINUED)

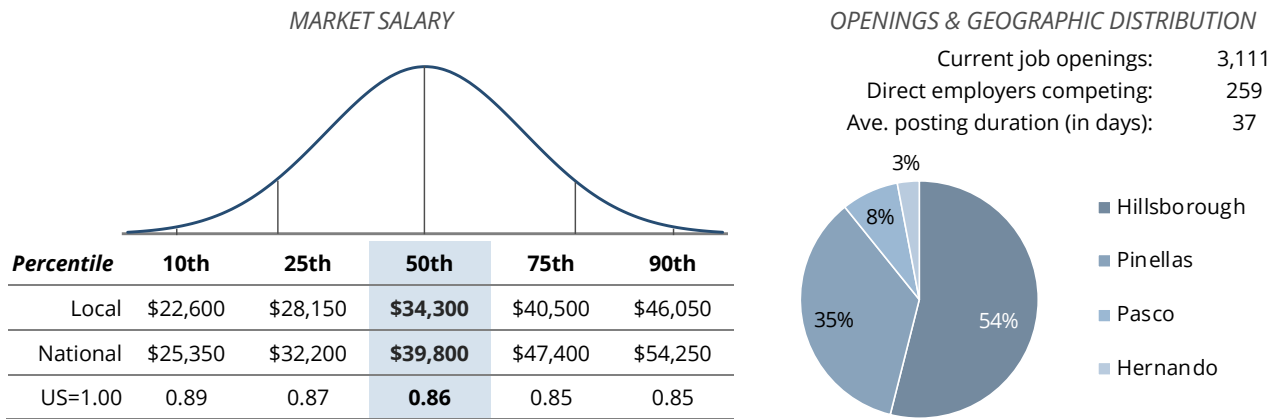
SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
MIDDLE-SKILL (<i>More than high school, less than four years</i>)							
35-2014	Cooks, Restaurant	12,173	10,318	1,389	0.89	10%	3%
43-3031	Bookkeeping, Accounting, & Auditing Clerks	16,886	9,451	-110	1.37	25% ◀	11% ◀
43-1011	First-Line Supvsr., Office & Admin. Support	16,527	9,410	1,127	1.89	21% ◀	5%
41-3099	Sales Reps., Services, All Other	11,958	7,934	671	0.81	17%	5%
35-1012	First-Line Supvsr., Food Prep. & Servers	9,188	7,523	803	1.46	11%	3%
49-9071	Maintenance & Repair Workers, General	13,306	7,449	861	0.70	25% ◀	7%
39-1021	First-Line Supvsr., Personal Srv. Workers	2,099	1,129	108	1.42	15%	5%
11-9051	Food Service Managers	1,633	1,017	95	0.81	15%	5%
37-1011	First-Line Supvsr., Housekeeping & Janitorial	1,481	947	98	1.30	24% ◀	6%
27-2042	Musicians & Singers	1,468	828	105	0.84	17%	19% ◀
35-1011	Chefs & Head Cooks	1,093	809	105	1.77	14%	3%
11-9081	Lodging Managers	684	377	18	0.53	17%	7%
HIGH SKILL (<i>Four-year degree or above</i>)							
11-1021	General & Operations Managers	12,980	6,635	1,208	4.73	20%	4%

Source: Emsi 2018.2—QCEW Employees, Non-QCEW Employees, and Self-Employed.

Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

HIRING. The following figures use real-time labor market information (LMI) to illustrate the hiring environment in the Tampa Bay MSA for the Hospitality & Tourism sector and relevant occupational groups.

FIGURE 6. REAL-TIME LMI OVERVIEW: HOSPITALITY & TOURISM SECTOR (NAICS 71 - 72)
JOB POSTINGS IN THE INDICATED INDUSTRIES, TAMPA BAY MSA (JAN 1, 2018–JUN 30, 2018)



TOP 10 COUNTS (number of postings out of ~10,750 total from Jan 1, 2018–Jun 30, 2018)

OCCUPATIONS

First-Line Supvrs., Food Prep. & Servers	1,885
Combined Food Prep. & Servers, Incl. Fast Food	825
Cooks, Restaurant	692
Waiters & Waitresses	589
Maids & Housekeepers	542
Hotel, Motel, & Resort Desk Clerks	416
Food Service Managers	412
Dishwashers	327
Customer Service Representatives	225
Hosts & Hostesses	220

EMPLOYERS

Marriott	783
Aramark Corporation	527
Boston Market Corporation	355
Taco Bell	340
Starbucks	304
SeaWorld Parks & Entertainment, Inc.	258
Pizza Hut	256
Panera Bread	254
Spectrum	243
Hyatt	239

HARD SKILLS

Food preparation	746
Microsoft Office	456
Quality Assurance	385
Mathematics	293
English speaker	229
Preventive maintenance	214
Housekeeping carts	171
Hazard analysis and critical control points	159
Quality control	125
Steam tables	121

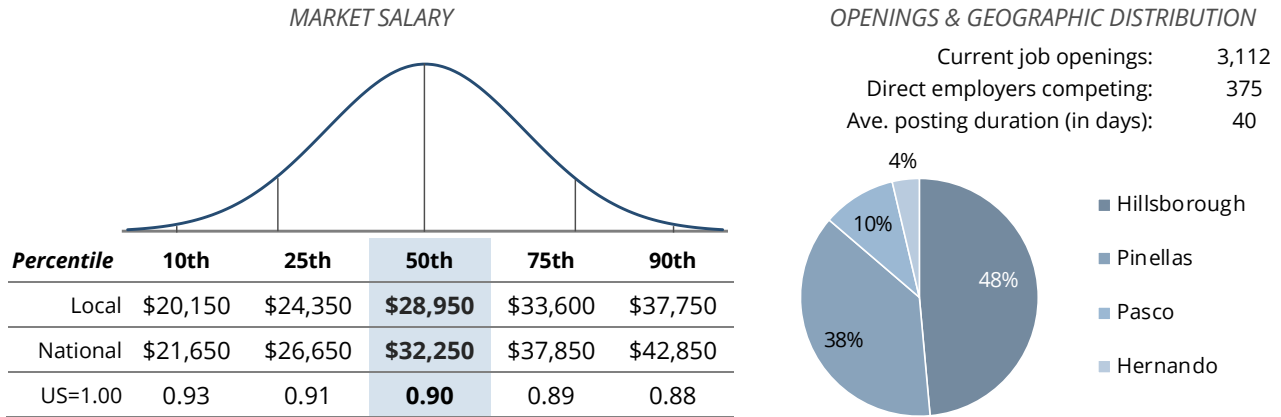
CERTIFICATIONS

Driver's License	923
Food safety programs	863
First Aid certification	124
OSHA Certification	111
Certification in CPR	54
Proof of Insurance	53
Automated External Defibrillator	52
Accounting	21
American College of Sports Medicine	17
Commercial Driver's License	17

Source: Gartner Talent Neuron (formerly Wanted Analytics)

Note(s): Demand for some occupations (e.g., production or skilled trades workers) and industries (e.g., manufacturing and construction), may be under-stated in job postings data as these positions are somewhat less likely to be filled using on-line job postings.

FIGURE 7. REAL-TIME LMI OVERVIEW: FOOD PREPARATION & SERVING OCCUPATIONS (SOC 35-0000)
 JOB POSTINGS IN ALL INDUSTRIES, TAMPA BAY MSA (JAN 1, 2018-JUN 30, 2018)



TOP 10 COUNTS (number of postings out of ~9,700 total from Jan 1, 2018-Jun 30, 2018)

<i>OCCUPATIONS</i>		<i>EMPLOYERS</i>	
First-Line Supvrs., Food Prep. & Servers	3,162	Marriott	367
Combined Food Prep. & Servers, Incl. Fast Food	1,515	Aramark Corporation	343
Cooks, Restaurant	1,172	Boston Market Corporation	291
Waiters & Waitresses	1,079	Compass Group	231
Dishwashers	606	BJ's Restaurants, Inc.	215
Attendants & Bartender Helpers	404	Taco Bell	214
Food Preparation Workers	380	Target Corporation	196
Hosts & Hostesses	335	Starbucks	185
Bartenders	241	Brinker International	182
Cooks, Institution & Cafeteria	220	Panera Bread	182

<i>HARD SKILLS</i>		<i>CERTIFICATIONS</i>	
Food preparation	1,345	Food safety programs	1,494
Hazard analysis and critical control points	336	Driver's License	279
Mathematics	233	OSHA Certification	79
Steam tables	213	Security clearance	61
Broilers	168	scaled agile framework	60
English speaker	165	HAZMAT	40
Quality Assurance	152	Continuing Education	24
Microsoft Office	151	Certified Professional - Food Safety	17
Food processors	148	Certified Dietary Manager	14
Bartending	117	Professional Food Manager	14

Source: Gartner Talent Neuron (formerly Wanted Analytics)

Note(s): Demand for some occupations (e.g., production or skilled trades workers) and industries (e.g., manufacturing and construction), may be under-stated in job postings data as these positions are somewhat less likely to be filled using on-line job postings.

TRAINING. Figure 8 through Figure 10 provide an overview of training relevant to the Hospitality & Tourism sector. Noncredit offerings are programs that do not lead to a degree. They include certificate programs, continuing education credits, and other types of workforce training programs.

Noncredit programs offered by regional institutions are focused almost exclusively on the Restaurants and Food/Beverage Services pathway.

No apprenticeships were identified for the Hospitality & Tourism career cluster.

The regional school districts offer various programs related to culinary arts. These course train students for industry certifications including Certified Food Production Manager (ServSafe), SafeStaff, and Microsoft Certification Bundle.

FIGURE 8. NONCREDIT OFFERINGS BY CAREER PATHWAY FOR SELECTED SCHOOLS

PATHWAY	HCC	SPC	PHSC	PTC
Lodging			—	
Recreation, Amusements & Attractions			—	
Restaurants and Food/Beverage Services	●		—	●
Travel and Tourism	●		—	

FIGURE 9. APPRENTICESHIP PROGRAMS BY CAREER PATHWAY

	NUMBER
TOTAL	0
Lodging	
Recreation, Amusements & Attractions	
Restaurants and Food/Beverage Services	
Travel and Tourism	

Sources: TIP Research (Figure 8), US DOL – ETA (Figure 9). Programs were categorized by career cluster and career pathway by TIP using O-Net. Pasco-Hernando State College non-credit courses were not available.

FIGURE 10. DEGREE PROGRAM OFFERINGS: HOSPITALITY & TOURISM CAREER CLUSTER SELECT REGIONAL INSTITUTIONS DURING THE 2016 ACADEMIC YEAR

PATHWAY	USF-Main	USF-SP	HCC	PHSC	PTC-CW	PTC-SP	SPC
Lodging			●				●
Recreation, Amusements & Attractions							
Restaurants and Food/Beverage Services			●		●	●	●
Travel and Tourism							

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS).

Note(s): IPEDS data include only schools eligible to participate in federal financial aid programs. Programs were categorized by career cluster and career pathway by TIP using O-Net.

USF = University of South Florida; HCC = Hillsborough Community College; PHSC = Pasco-Hernando State College; PTC = Pinellas Technical College; SPC = St. Petersburg College.

ASSOCIATIONS & RESOURCES. Tampa Bay has a number of assets and initiatives that support the Hospitality & Tourism sector. These include:

- *Hillsborough County Hotel Motel Association.* The HCHMA is a membership-based organization comprised of local hotels, motels, resorts, industry partners and affiliated businesses that collectively contribute to Tampa Bay's multi-billion dollar tourism industry.
- *Florida Restaurant & Lodging Association, Pinellas Chapter* is dedicated to promoting the industry and educating current and future employees. The Pinellas Chapter is committed to serving the local hospitality industry through advocacy, community involvement, partnerships and unparalleled access to hospitality professionals and decision makers.
- *Bay Area Concierge Association.* Founded in 1994, B.A.C.A. has over 75 members representing most major bay area hotel and resort brands, along with affiliated industry suppliers and marketing specialists in Tampa, St. Petersburg/St.Pete Beach and Clearwater Beach areas.
- *Tampa Bay Hospitality Alliance.* TBHA is a partnership between the Hillsborough County Hotel/Motel Association and Pinellas Chapter of the Florida Restaurant and Lodging Association. Through their founding event, for 26 years ExTravelganza has provided a path for students to achieve their educational goals by providing scholarships in Hospitality and Culinary Studies.