



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 85 percent of all employment in the commonwealth.

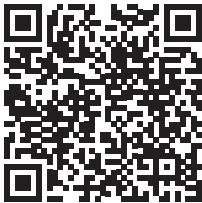
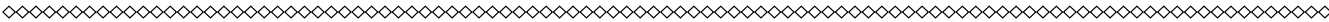
Cluster Summary

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.

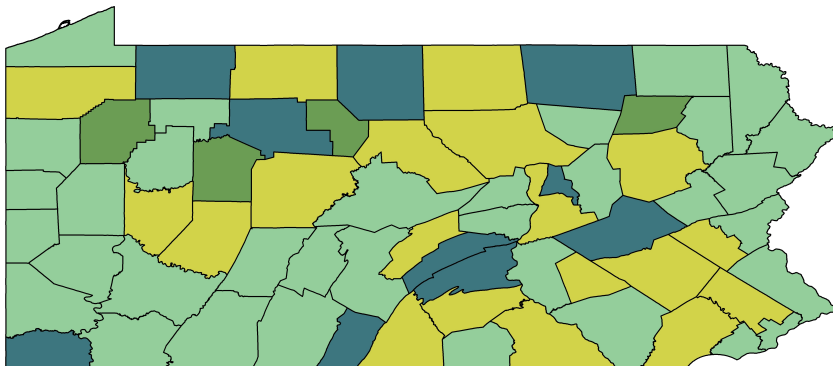
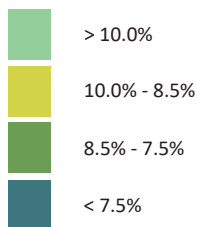
	2018	2023
Employer Units	38,256	38,713
Number of Jobs	620,559	604,130
Percent of Total Pennsylvania Jobs	10.6%	10.1%
Average Annual Wages	\$21,523	\$28,356
Location Quotient (LQ)	0.86	0.85

LQs greater than one suggest a competitive advantage.

Cluster employment has decreased in Pennsylvania (3%) over the last five years. The state still maintains a location quotient (LQ) well below one, and the majority of Workforce Development Areas (WDAs) also have an LQ below one (as seen on page 3). While wages have increased (32%), the cluster still pays well below the statewide average for all jobs (\$69,300).

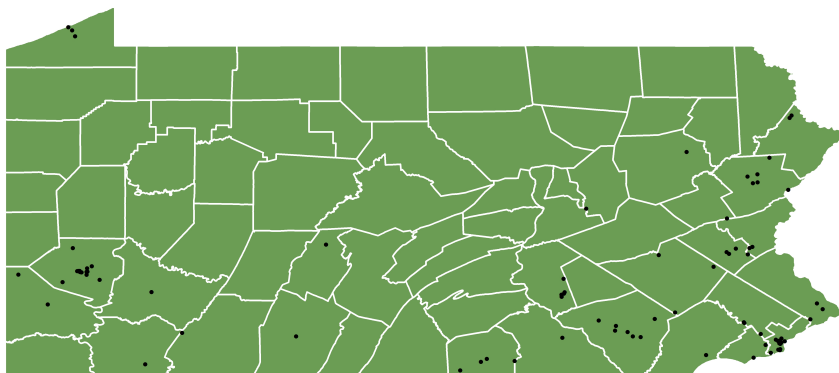


Percent Employment by County



Major Employers

- McDonalds
- GMRI Inc.
- Dunkin
- Aramark Campus LLC
- Wendy's
- Burger King



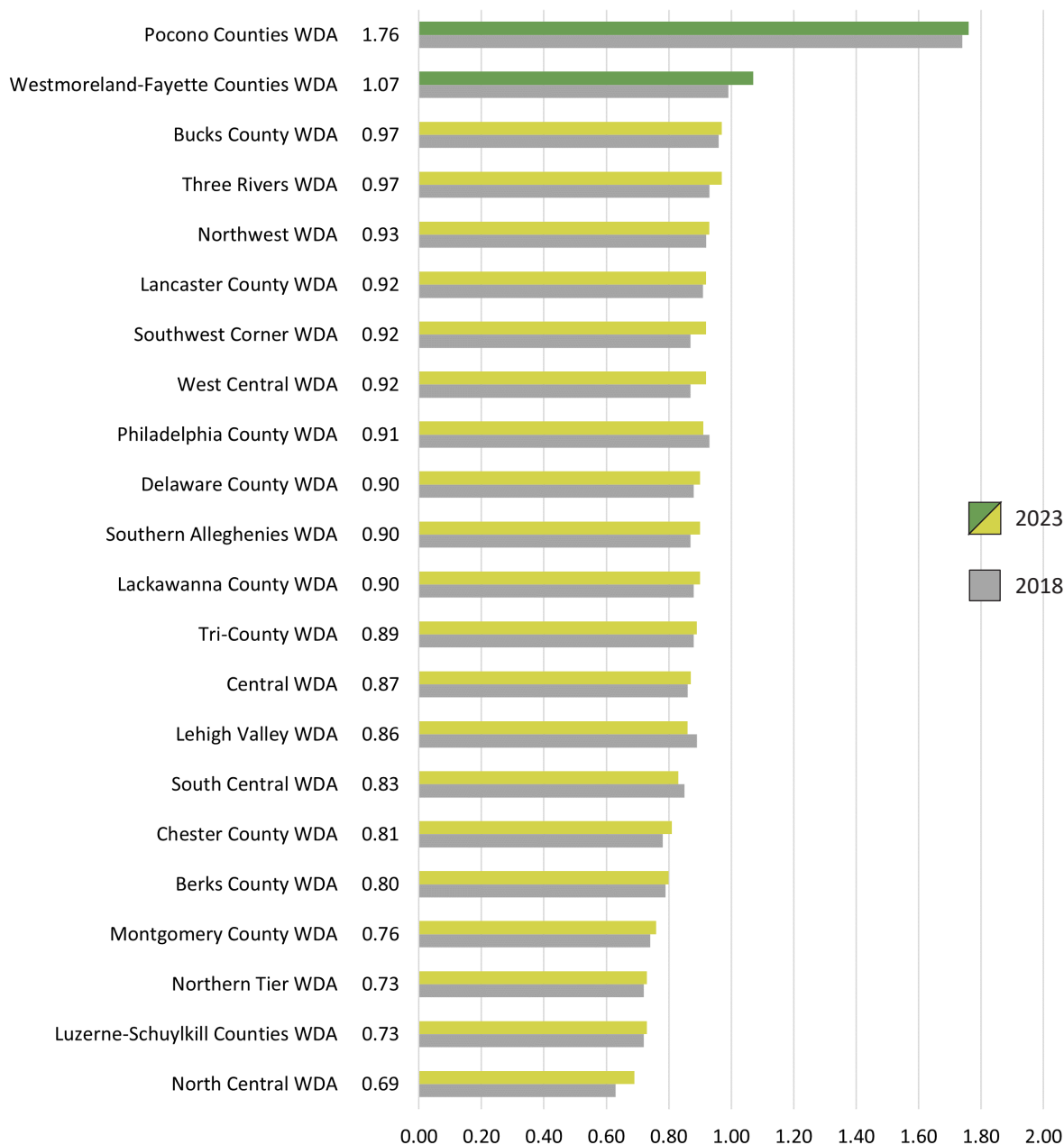
Top Industries Based on Employment

- | | |
|---|-----------------------------------|
| • Full-Service Restaurants | • Sporting Goods Retailers |
| • Limited-Service Restaurants | • Sports Teams & Clubs |
| • Hotels & Motels, Except Casino Hotels | • Caterers |
| • Snack & Nonalcoholic Beverage Bars | • Promoters With Facilities |
| • Food Service Contractors | • Casino Hotels |
| • Golf Courses & Country Clubs | • Casinos |
| • Fitness & Recreational Sports Centers | • Sports & Recreation Instruction |
| • Drinking Places, Alcoholic Beverages | • Gift, Novelty & Souvenir Stores |
| • All Other Amusement & Recreation Industries | • Museums |
| • Amusement & Theme Parks | • Hobby, Toy & Game Stores |



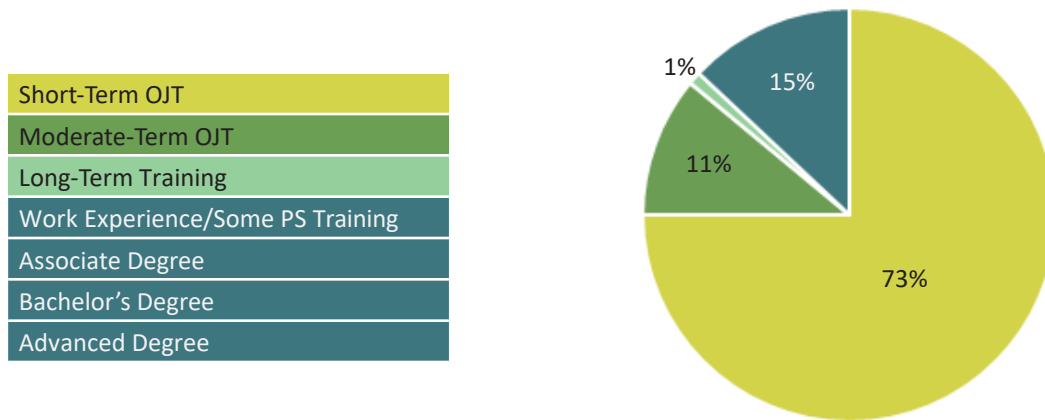
Employment Concentration

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 Workforce Development Areas (WDAs) have an LQ greater than one.



Educational Requirements

This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. Approximately 73 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 5,200 people in the HLE cluster.

			Annual Demand	
SOC Code	Occupation	Average Wage	All Industries	Industry Cluster
35-3023	Fast Food & Counter Workers	\$28,690	37,652	30,752
35-3031	Waiters & Waitresses	\$36,610	15,805	15,106
35-2014	Cooks, Restaurant	\$34,140	8,680	8,203
35-1012	Supervisors- Food Preparation & Serving Workers	\$42,680	6,039	4,740
35-9031	Hosts & Hostesses, Restaurant/Lounge/Coffee Shop	\$29,050	4,178	3,896
39-3091	Amusement & Recreation Attendants	\$27,410	3,588	3,337
35-3011	Bartenders	\$31,300	4,380	3,225
35-9021	Dishwashers	\$29,140	3,036	2,606
35-9011	Dining Room & Cafeteria Attendants & Helpers	\$29,060	2,576	2,366
41-2031	Retail Salespersons	\$34,320	22,324	2,349
41-2011	Cashiers	\$29,170	22,739	2,081
35-2021	Food Preparation Workers	\$31,360	3,705	1,926
37-2012	Maids & Housekeeping Cleaners	\$33,340	6,381	1,828
43-4081	Hotel, Motel & Resort Desk Clerks	\$32,020	1,224	1,214
39-9031	Exercise Trainers & Group Fitness Instructors	\$47,150	2,239	1,060

*The 2024 average annual wage reflects wages across all industries and is not specific to the cluster.

