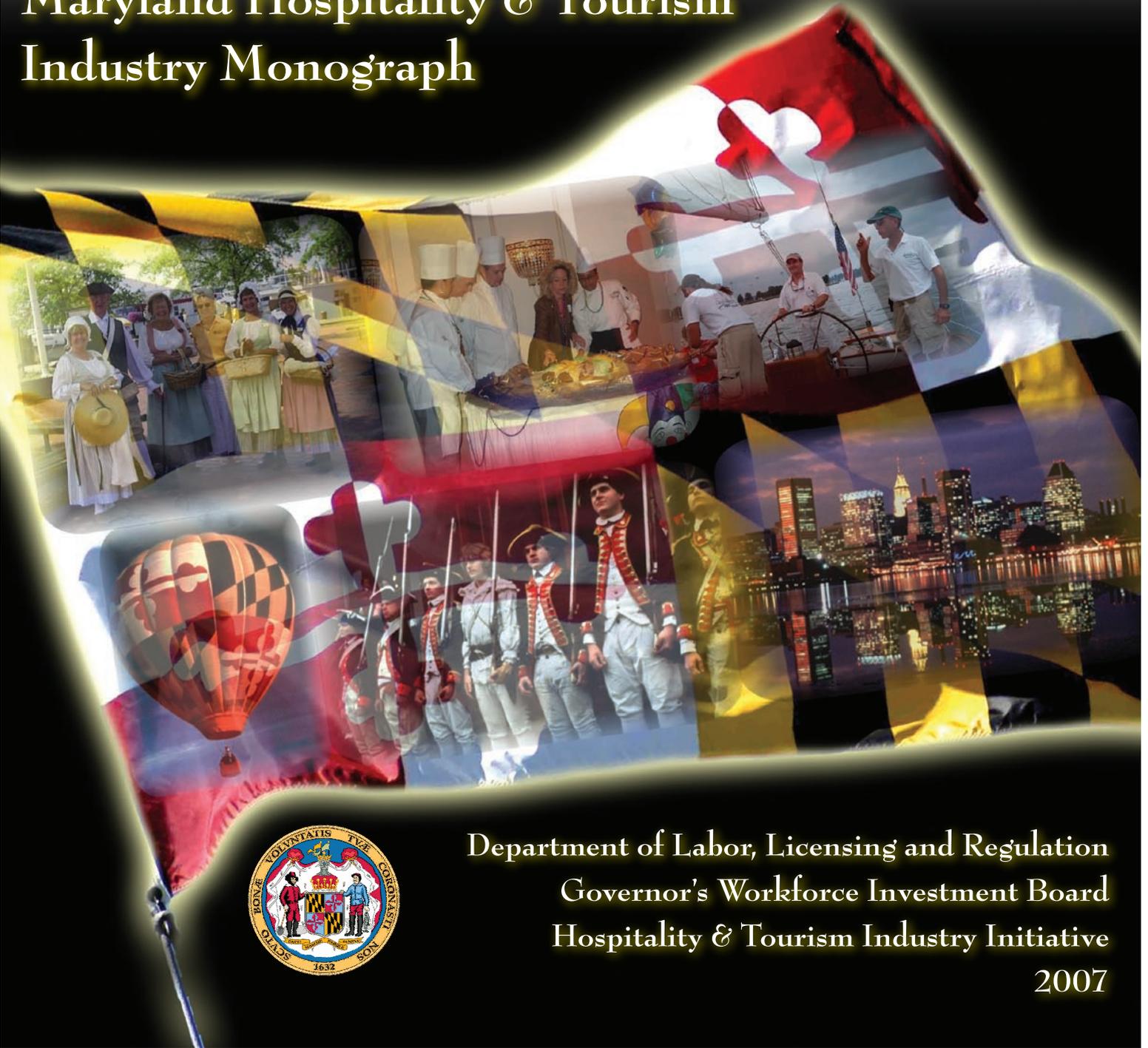




Charting New Directions

Maryland Hospitality & Tourism Industry Monograph



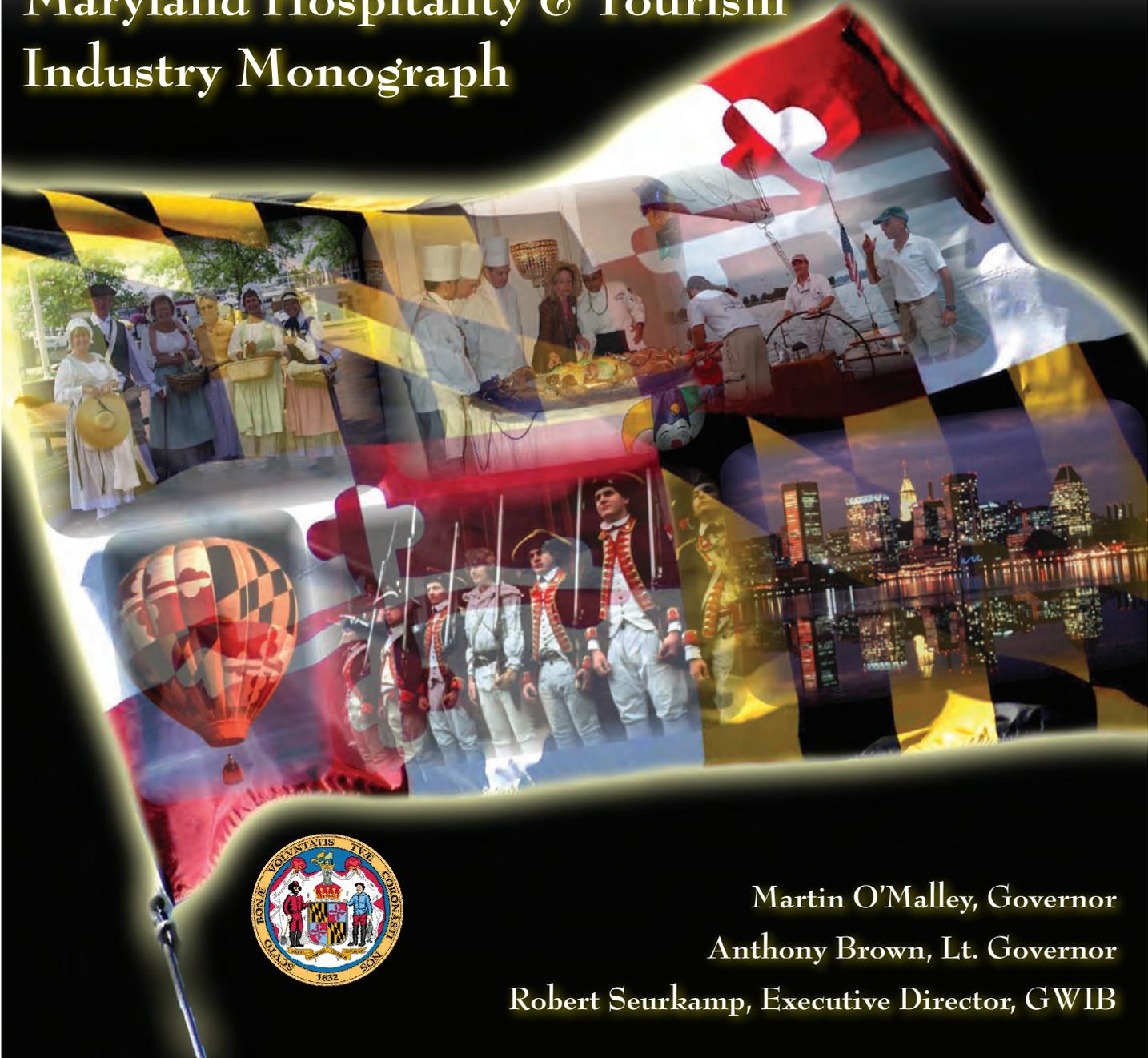
Department of Labor, Licensing and Regulation
Governor's Workforce Investment Board
Hospitality & Tourism Industry Initiative

2007



Charting New Directions

Maryland Hospitality & Tourism Industry Monograph



Martin O'Malley, Governor
Anthony Brown, Lt. Governor
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Department of Labor, Licensing and Regulation
Governor's Workforce Investment Board
Hospitality and Tourism Industry Initiative

2007

Governor's Workforce Investment Board, 1100 North Eutaw Street Room 108, Baltimore, Maryland 21201
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Executive Summary

The Maryland hospitality and tourism industry is one of the fastest growing industries in the state. In 2005, the state welcomed more than 27 million visitors, and the most recent figures show that the industry contributed \$10 billion to Maryland's economy that year.¹

The 7.2% employment increase between 2001 and 2004 was more than four times the rate for total private sector employment, resulting in a net increase of 15,464 jobs.² The industry is forecasted to continue this rate of growth over the next several years. An estimated 1,068,525 openings (growth combined with replacement demand) will be added to the Maryland economy through 2012.³

Although the good news is the predicted growth in the hospitality and tourism industry, the bad news—or the challenge that the industry will face—is the predicted shrinkage of the pool of potential workers.⁴ The leading edge of the baby boomer generation (those born between 1946 and 1964) is reaching retirement age this year and leaving the workforce. Many of those retiring will come from the management ranks. The next generations poised to replace them, and from whose ranks hospitality and tourism businesses hire entry-level workers or seasonal workers, are significantly smaller, leaving a sizeable gap in the labor pool throughout the economy. The hospitality and tourism industry will be working harder than ever to find qualified labor to fill those positions.

The increasing demand for workers combined with the decreasing supply will be a great challenge to the hospitality and tourism industry as it competes with other industry

sectors to attract and retain the workers it needs now and in the future. Maryland's hospitality and tourism industry must take action today to alleviate the current workforce shortage and create a pipeline of qualified workers to meet tomorrow's demand.

The research conducted by the Governor's Workforce Investment Board's (GWIB) Hospitality and Tourism Industry Steering Committee during the past 18 months was designed to better understand the employment needs of this diverse industry. Research included industry surveys, workforce and economic reports, regional studies, special reports and summaries prepared by departments or experts in government, education, and workforce development. Existing data relevant to the industry workforce from a variety of national and state agencies, including the U.S. Census Bureau; the Maryland Department of Labor, Licensing, and Regulation (DLLR); the Maryland Department of Business and Economic Development (DBED); U.S. Department of Labor, Bureau of Labor Statistics (BLS); and hospitality and tourism trade associations were evaluated. From the data, a series of critical workforce issues were identified and discussed. There were several recurring themes, and the committee identified two key workforce areas that merited further attention. These areas are:

- Pipeline development by attracting and traditional and nontraditional workers
- Workforce development through improved worker training and retention programs

The specific workforce issues identified and the strategies recommended to address each issue are listed in Table 1.

The GWIB Hospitality and Tourism Industry Steering Committee created this monograph from the information gathered from March 2005 through November 2006. It is designed to help Maryland's hospitality and tourism industry articulate its employment needs and develop a strategic action plan for attracting, recruiting, training, and retaining its workforce. This monograph serves as a record of where the industry believes it stands today and as a starting point from which summit attendees and stakeholders can discuss today's workforce issues and develop tomorrow's potential solutions. The proposed policy and programmatic strategies articulated in this monograph will be reviewed, edited, discussed, and prioritized in breakout sessions at the GWIB's Hospitality and Tourism Workforce Summit in January 2007. This summit will launch a long-term action plan to be executed after the summit in a partnership between Maryland's hospitality and tourism industry, its government, and its education institutions working together to form viable employment solutions for the industry.

A hospitality and tourism post-summit report will detail the action plans for the strategies

prioritized at the summit. The GWIB Hospitality and Tourism Industry Steering Committee will then enter the action phase and begin work at a subcommittee level to guide and monitor the development of these individual action plans. The post-summit report will be presented to the Maryland state secretaries, who sit on the GWIB and represent all the state departments, including, but not limited to, Labor, Licensing and Regulation, Transportation, Housing, Higher Education, Business and Economic Development, and K-12 Education, among others. The anticipated result of this dialogue will influence the policy and programmatic initiatives designed to help employers attract, develop, and retain their workforce for the next 10 to 20 years.



Table 1 Workforce Issues and Recommended Strategies

Workforce Issue	Description of Workforce Issue	Recommended Strategies
Industry Appeal	Employees are unwilling to enter or remain in the industry due to negative perceptions about career choices, advancement, benefits, and compensation	<ul style="list-style-type: none"> • Continue to build partnerships with educational institutions and other workforce service providers • Improve and publicize benefits and career opportunities • Develop and disseminate recruitment plans • Develop an industry-wide marketing plan to improve image
Industry Exposure	Potential employees are unaware of the variety of career opportunities available in the industry	<ul style="list-style-type: none"> • Continue to build partnerships with educational institutions and other workforce service providers • Improve and publicize benefits and career opportunities • Develop and disseminate recruitment plans • Develop an industry-wide marketing plan to improve image • Connect with nontraditional labor sources
Skills	Potential employees are deemed unqualified because of a lack of skills or because employers cannot determine skill level	<ul style="list-style-type: none"> • Continue to build partnerships with educational institutions and other workforce service providers • Create a statewide resource network for advancing basic skills • Support tax incentives for English as a second language (ESL) and adult basic skills training
Immigration Status	Potential employees are disqualified because of immigration status or because employers are unable to confirm immigration status	<ul style="list-style-type: none"> • Support the development of a state liaison office for immigration issues
Seasonal Workforce	Employers require temporary seasonal workforce	<ul style="list-style-type: none"> • Support the development of a state liaison office for immigration issues • Continue to build partnerships with educational institutions and other workforce service providers • Conduct research on transportation and housing concerns • Support a change in school-year calendar • Connect with nontraditional labor sources
Benefits and Compensation	Employees are unable to enter, advance, or remain in industry due to inadequate benefits and compensation	<ul style="list-style-type: none"> • Continue to build partnerships with educational institutions and other workforce service providers • Improve and publicize benefits and career opportunities • Develop and disseminate recruitment plans • Help small-business owners to provide competitive benefits • Simplify grant applications for small businesses to train employees
Labor-Saving Technology	Employees are unaware of labor-saving alternatives	<ul style="list-style-type: none"> • Promote industry-wide conferences and meetings to communicate innovations and technology • Alert and advise employers about labor-saving alternatives
Housing and Transportation	Potential employees are unable to enter industry due to lack of affordable housing near or transportation to and from places of employment	<ul style="list-style-type: none"> • Conduct research on transportation and housing concerns

The Hospitality and Tourism Industry Profile

Introduction to the Hospitality and Tourism Industry in Maryland

Maryland's importance in the formation of the United States is well documented. From the establishment of trading posts as early as 1631 on Kent Island and St. Mary's City, to Annapolis, which served as the capitol of the newly forming American nation, to the significant battles that took place here during the Civil War, Marylanders have played a significant role in history.

The state's diversity is not only evident in its population, but also in the magnificent natural resources that exist within its boundaries. From the mountains to the Atlantic Ocean, from the Chesapeake Bay to its rolling hills, no other state can be called "America in Miniature," a title that *National Geographic* magazine bestowed on Maryland.⁵

Maryland has a wealth of activities for residents and visitors alike. Changing Friendship Airport, a regional airport in the 1950s, to the world-class Baltimore/Washington International Thurgood Marshall Airport has enabled quick, easy accessibility to all the state has to offer to both national and international visitors. Continued improvement and development of the state's scenic roads and modern highways has helped bring in- and out-of-state visitors to many of the state's regions.

In western Maryland, Deep Creek Lake and the development of a major skiing and water-sport community have increased visitation and expanded economic development. The hospitality and tourism industry is hard at work as visitors engage in water or snow sports, hike along trails, view natural waterfalls, visit the many state parks and forests, and experience the Civil War by visiting the

national parks, state parks and the Civil War Medical Museum.

The state's largest cities are located in the central region. Baltimore is considered a world-class destination, while Annapolis is recognized as the "Sailing Capitol of the World." The area's rich history can be experienced in the Banneker-Douglass Museum in Annapolis and in the Reginald F. Lewis Museum in Baltimore. Over the past 50 years, the state's capitol, Annapolis, has been beautifully restored in this historic landmark city. The Maryland State House in Annapolis is the oldest state house in continuous use in the country and continues to be a popular attraction. In the years since its reformation, Baltimore's Inner Harbor has attracted millions of visitors. The world-famous Preakness, the second race in the horse-racing world's Triple Crown, takes place in Baltimore, because the rolling hills surrounding the city boast some of the country's finest horse breeding stables. Hospitality and tourism businesses in this region are hard at work providing visitors with these and other world-class cultural and recreational attractions, along with restaurants, accommodations, and travel services.

To the south and the east, visitors will find Maryland's colonial capitol and experience the life of the early settlers through exhibits and attractions. Development programs, such as the building of the Bay Bridges, opened the door to the Atlantic Ocean. Visitors to eastern Maryland find the famed bayside "Eastern Shore," the seaside family resort of Ocean City, and Assateague Island State and National Parks. In these areas the hospitality and tourism industry hosts visitors on camping, fishing, and water sport adventures.

In the early 1950s, the promotion of Maryland to visitors became a priority for a number of tourism professionals, who came together and formed an umbrella organization called the Maryland Tourism Council. The council's lobbying efforts helped lead to the formation of the Division of Tourism under the then Department of Economic Development. The council then lobbied to fund a major marketing program to encourage visitation to the state. Since those early days, the budget of the Division of Tourism, Film, and the Arts has grown significantly. Today, tourism contributes \$10 billion to the state's economy, making it the state's fourth largest economic engine.

The Hospitality and Tourism Industry Defined

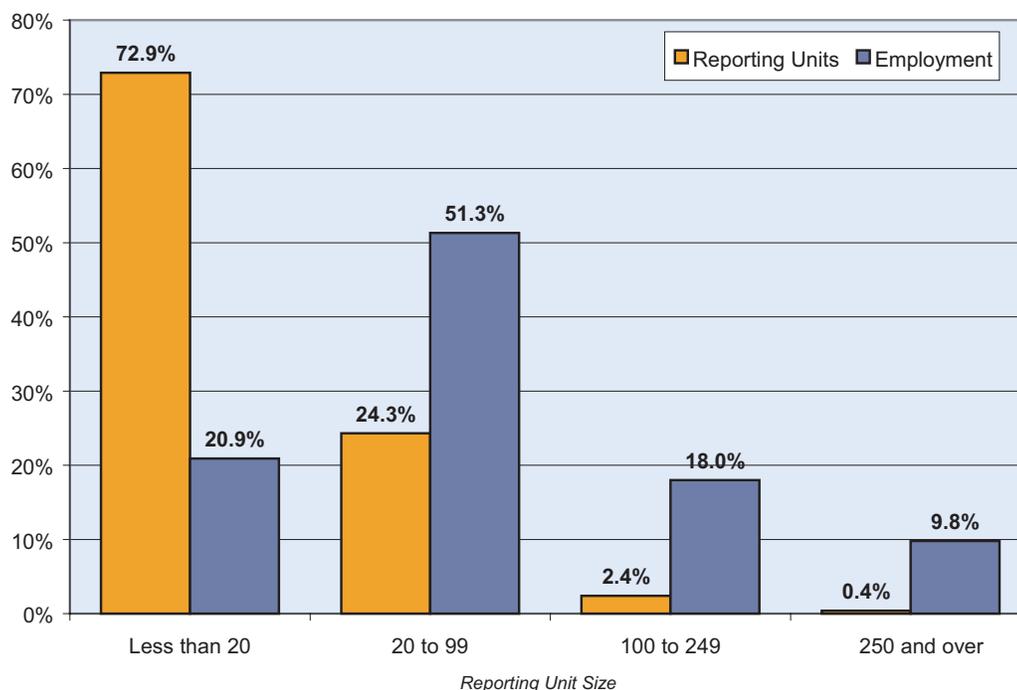
Maryland's multibillion dollar hospitality and tourism industry employed almost

230,000 people in more than 13,000⁶ diverse businesses in four segments: restaurant and food/ beverage services; lodging; parks, recreation, amusements, and attractions; and travel and tourism.

Table 3, presented at the end of this document, lists the four segments of the hospitality and tourism industry described above, the North American Industry Classification (NAICS) code numbers, the types of businesses, and specific examples of these businesses.

Overall the industry is dominated (72.9%) by employers with fewer than 20 employees; however, a significant number of businesses have between 20 and 99 employees.⁶ Businesses in this latter group account for the largest worker concentration, employing approximately half of the workers in the hospitality and tourism industry (Figure 1).

Figure 1 Reporting Units and Employment Concentration in the Hospitality and Tourism Industry by Size Class (based on third quarter 2005 average employment)⁶



Restaurant and Food/Beverage Services

The Restaurant and Food/Beverage Services segment includes businesses that prepare and provide food and/or beverages to patrons in a variety of settings. It is divided into clusters representing full-service restaurants, businesses offering limited-service eating, special food services, and establishments that serve alcoholic beverages for immediate consumption. It also includes food service contractors, caterers, and mobile food service providers.

The Restaurant and Food/Beverage Services segment comprises 9,103 businesses⁷ and employed over 164,000 people in 2004, carrying a payroll of more than \$2.3 billion.⁶ The industry share of employment for this segment was 71.3% in 2004, with full- and limited-service restaurants contributing 63.8% to this share. Employment in this sector increased by more than 13,000 jobs between 2001 and 2004, with almost 7,000 of these new jobs coming from the business cluster that offers limited-service eating (Figure 2). During the three-year period ending in 2004, the restaurant and food/beverage services segment not only showed the largest employment growth within the entire hospitality and tourism industry, but also showed the lowest average weekly wage (Figure 3).

Lodging

The Lodging segment consists of businesses that provide lodging for business travelers, vacationers, and others. This segment is divided into two clusters, one that represents traveler accommodations (hotel, motels, and inns) and the other representing public and private RV parks and recreational camps (travel trailer/tent campgrounds, cabins, and recreation/vacation camps). Some supply lodging and/or camping only, while others also provide meals, entertainment, and recreational facilities.

The Lodging segment comprises 713 businesses⁷ and employed over 24,000 people in 2004, carrying a payroll of over \$800 million.⁶ The industry share of employment for this segment was 10.8% in 2004, with motels, hotels, and inns contributing 10.4% to this share. Employment in this sector decreased overall by more than 800 jobs in the three-year period ending in 2004; however, the public and private RV parks and recreational camps cluster showed a significant increase of 15% (Figure 2). During the same time period, this segment experienced the largest employment decline within the hospitality and tourism industry; it also paid the highest average weekly wage (Figure 3).



Parks, Recreation, Attractions, and Amusements

The Parks, Recreation, Attractions, and Amusements segment includes businesses that provide services to meet a variety of entertainment interests. This segment has the most clusters (nine), including museums, historic sites, and similar institutions; amusement, theme, national, state, county and local parks and arcades; gambling industries; other amusement and recreation industries; performing arts companies; spectator sports; promoters of performing arts and sports; agents and managers for artists, athletes, entertainers, and other public figures; and independent artists, writers, and performers. These establishments preserve and exhibit

objects, animals, and sites of historic, cultural, or educational interest and operate facilities or provide services for recreational activities, amusements, nature study, wildlife viewing, boating and other leisure-time pursuits.

The Parks, Recreation, Attractions, and Amusements segment comprises 2,164 businesses⁷ and employed more than 35,000 people in 2004, carrying a payroll of over \$820 million.⁶ The industry share of employment for this segment was 15.4% in 2004, with all clusters contributing almost evenly. The highest employment cluster in this segment was held by the spectator sports cluster, which contributed 1.2% to the segment share. Employment in this sector increased by more than 3,000 jobs in the three-year period ending in 2004, with the most growth seen in the promotion cluster, which increased by 650 jobs (Figure 2). During the same time period, the average wage for this segment was close to the industry average. However, this may be due to the fact that this segment includes the clusters with the two highest average wages in the industry: spectator sports and public figure agents (Figure 3).

Travel and Tourism

The Travel and Tourism segment comprises five clusters representing scenic and sightseeing transportation on land, scenic and sightseeing transportation on water, other scenic and sightseeing transportation, travel arrangement and reservation services, and convention and trade show organizers.

Some of these businesses provide different modes of transportation for recreation and entertainment. This transportation is usually

local and involves same-day return to place of departure. In addition, there are businesses that sell travel services, arrange and conduct tours, provide car rental services, provide campground and cabin reservation services, and operate ticket sales or reservation agencies. Other businesses in this segment organize, promote, and/or manage events such as business and trade shows, conventions, conferences, and meetings.

The Travel and Tourism segment is composed of 676 businesses⁷ and employed over 5,700 people in 2004, carrying a payroll of over \$178 million⁶. The industry share of employment for this segment was 2.5% in



2004, with travel arrangement and reservation services contributing 1.4% to this share.

Employment in this sector overall showed a 100-job decrease in the three-year period ending in 2004. Slight employment growth was seen in the transportation and trade show

businesses, but the largest cluster employer, travel arrangements and reservation services, showed a significant decline of 400 jobs (Figure 2). During the same time period, this segment showed higher-than-average weekly wages for the hospitality and tourism industry (Figure 3).

Figure 2 Employment Change in the Hospitality Industry Segments from 2001 to 2005⁶

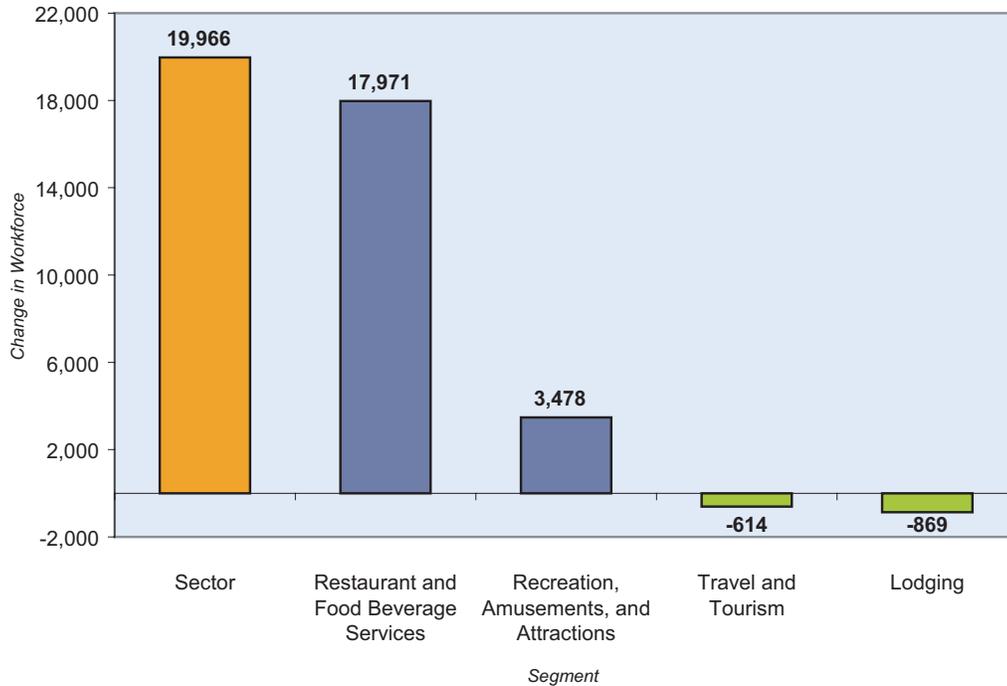
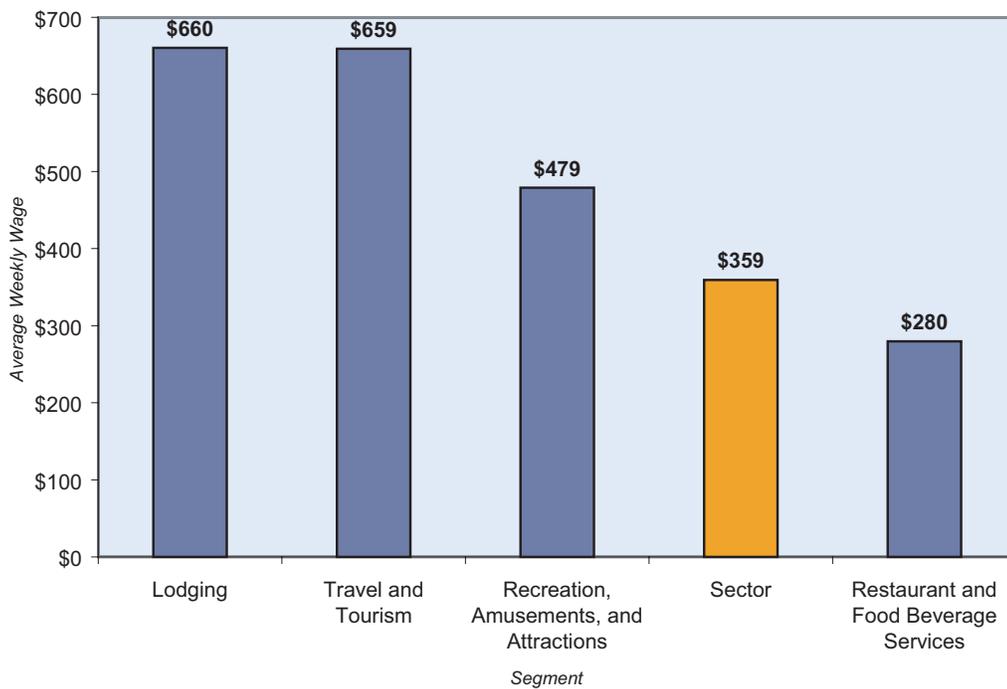


Figure 3 Average Weekly Wages in the Hospitality and Tourism Segments, 2005⁶



Businesses in the Maryland hospitality and tourism industry are spread throughout the state, with the largest concentration of employment located in Montgomery County (Figure 4). All jurisdictions showed job

growth in the 2001 to 2004 period; however, Prince George's County experienced the largest growth, with an increase of 3,397 jobs (Figure 5).

Figure 4 Local Share of Statewide Employment in the Hospitality and Tourism Industry, 2004⁶

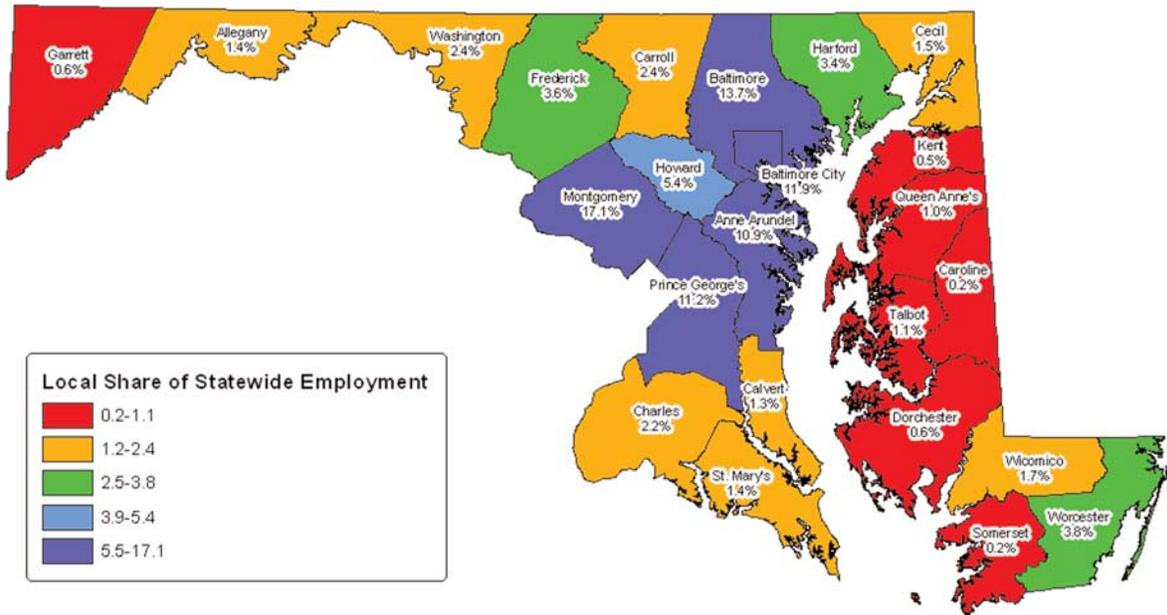
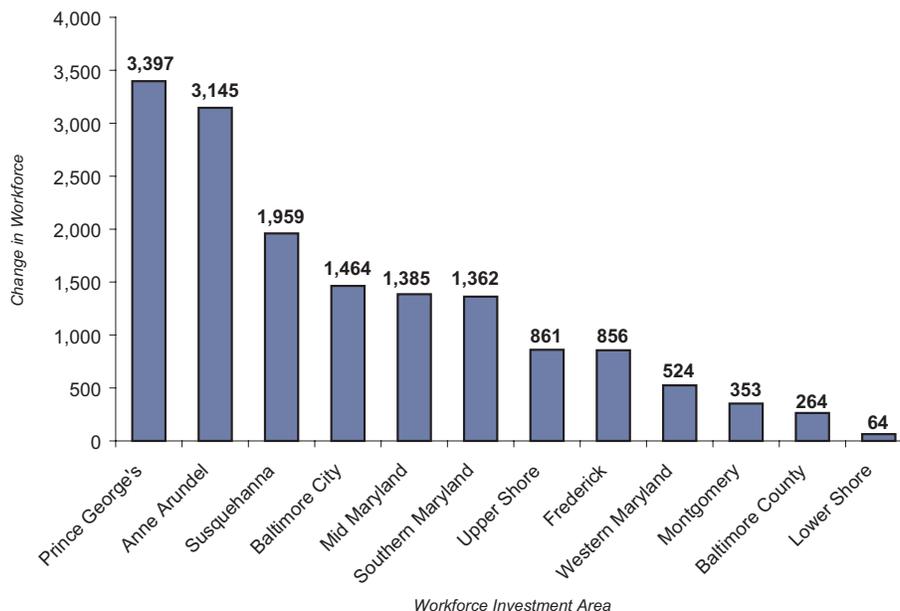


Figure 5 Employment Changes in the Hospitality and Tourism Industry by WIA from 2001 to 2004⁶



Economic Impact of the Hospitality and Tourism Industry in Maryland

The hospitality and tourism industry in Maryland has a profound impact on the health of the state's economy. The data presented here include all travel-related economic effects.⁸ The hospitality and tourism industry is represented in this data as three industry sectors: Entertainment and Recreation, Food Service, and Lodging.

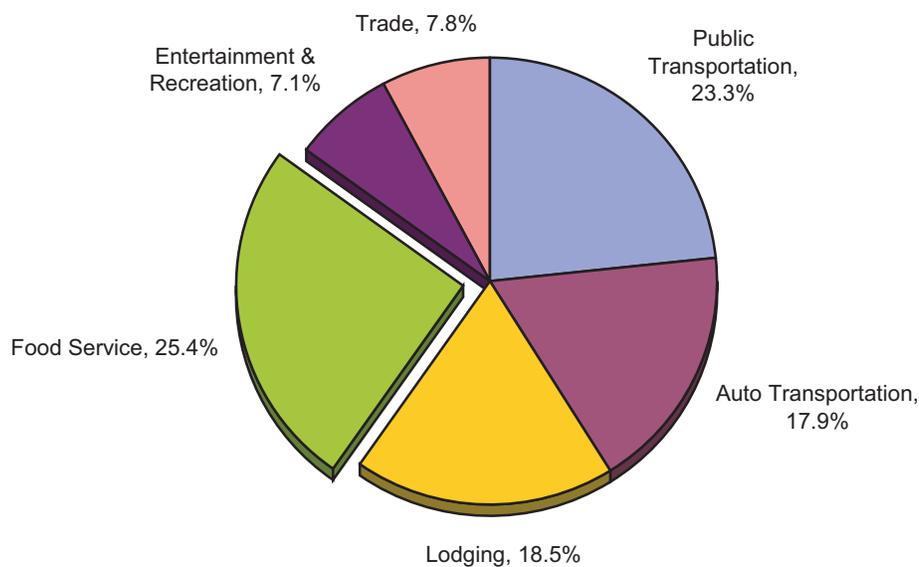
Travel Expenditures

Domestic and international travelers to Maryland spent nearly \$10.7 billion in 2005. This is a 6.0 percent increase over the 2004 expenditures. Both domestic and international travel spending increased over the 2004 to 2005 time period by 5.7 and 13.1 percent, respectively.

The food-service and lodging sectors showed significant and increased spending in the 2004 to 2005 time period. Domestic travelers spent the majority of their travel-related dollars on food service. Food service totaled \$2.6 billion in 2005, amounting to an increase of 4.2 percent from 2004. These expenditures accounted for 25.4 percent of the total domestic travel spending in Maryland during 2005 (Figure 6).

The lodging sector was the third largest area of spending in 2005. Lodging was up 8.2 percent from 2004 to \$1.9 billion, accounting for 18.5 percent of the state domestic total (Figure 6). The entertainment and recreation sector remained fairly steady, with the least travel spending in the state domestic total from 2004 to 2005, shrinking slightly from 7.2 percent in 2004 to 7.1 percent in 2005.

Figure 6 Domestic Travel Spending in Maryland by Industry Sector-2005⁸

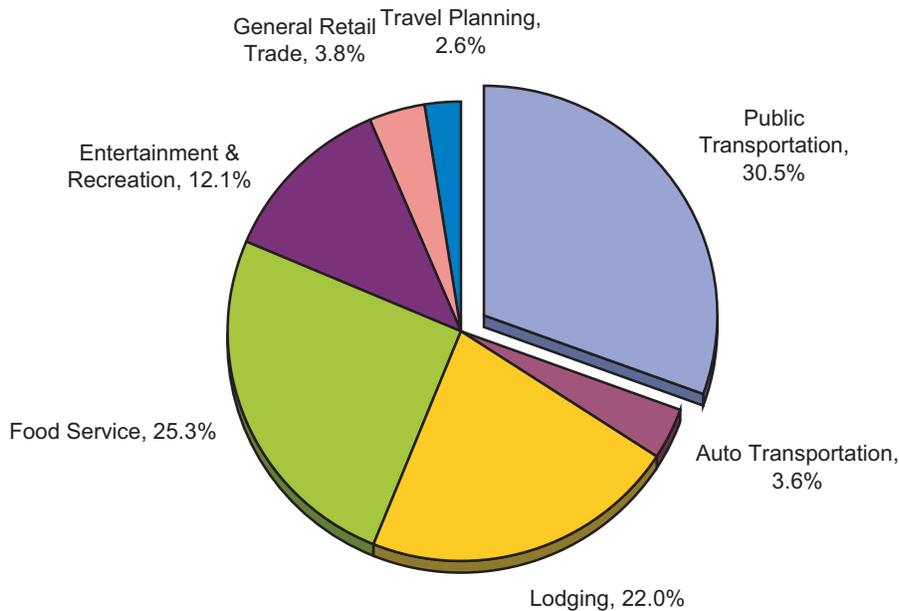


Travel-Generated Payroll

Travel-generated payroll is the wage and salary income paid to employees directly serving the traveler within the industry sectors. Wages and salaries paid by Maryland travel-related firms and directly attributable to domestic and international traveler spending reached more than \$3.0 billion in 2005. This represented an increase of 4.6 percent from 2004. This means that, on average, every dollar spent by domestic and international travelers produced 28 cents in wage and salary income for Maryland residents in 2005.

Food service was the state's second largest domestic payroll category, with an increase of 3.0 percent from 2004. This totals \$739 million and was more than one-fourth of the state total for the year. The lodging sector followed the food service sector with \$644 million in domestic travel-generated payroll, up 7.0 percent from 2004. The entertainment and recreation sector remained the fourth largest payroll category in 2005, accounting for 12.1 percent of the state's total.

Figure 7 Domestic Travel-Generated Payroll in Maryland by Industry Sector-2005⁸



Travel-Generated Employment

The travel and tourism industry supports many businesses and jobs in the Maryland economy. Because of the great diversity of businesses in Maryland, a wide range of jobs is supported, from executive and managerial positions to entry-level occupations.

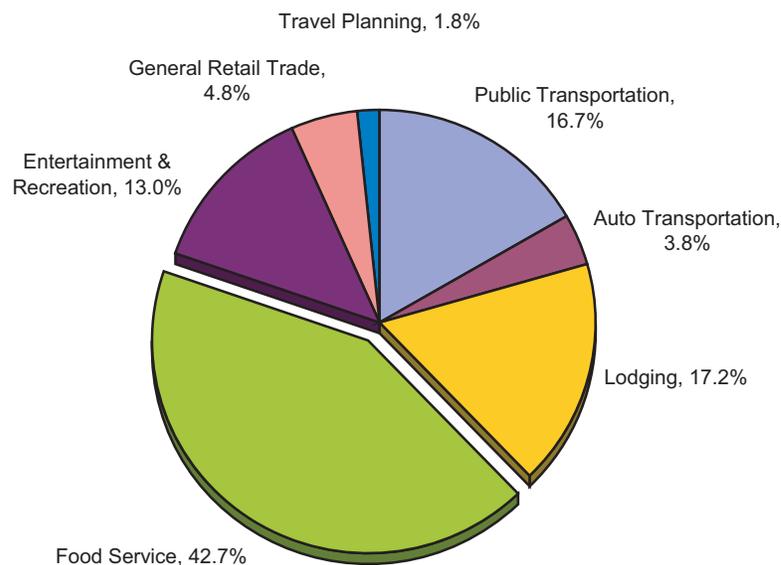
Domestic and international traveler spending in Maryland was steady from 2004, generating 115,800 jobs in 2005, including full-time and seasonal/part-time positions. On average, every \$92,155 spent by travelers in Maryland directly supported one job.

The 115,800 travel-related jobs comprised 4.5 percent of total nonagricultural employment in Maryland during 2005. Without these jobs generated by travel, Maryland's 2005

unemployment rate of 4.1 percent would have been 4.0 percentage points higher, or 8.1 percent of the state's total labor force.

During 2005, three out of five travel-related jobs generated by domestic travel in Maryland were in the food service and lodging sectors. The food service category supplied more jobs to the state economy than any other industry sector in 2005. This sector accounted for 47,400 jobs, or 42.7 percent of the state domestic total (Figure 8). The lodging sector remained the second largest provider of jobs, increasing 1.0 percent in 2005 to 19,200. The entertainment and recreation category accounted for 13 percent of the state's domestic total and remained the fourth largest sector for employment (Figure 8).

Figure 8 Domestic Travel-Generated Employment in Maryland by Industry Sector-2005⁸



Travel-Generated Tax Revenue

Travel-generated tax revenue contributes significantly to Maryland's federal, state, and local funds.

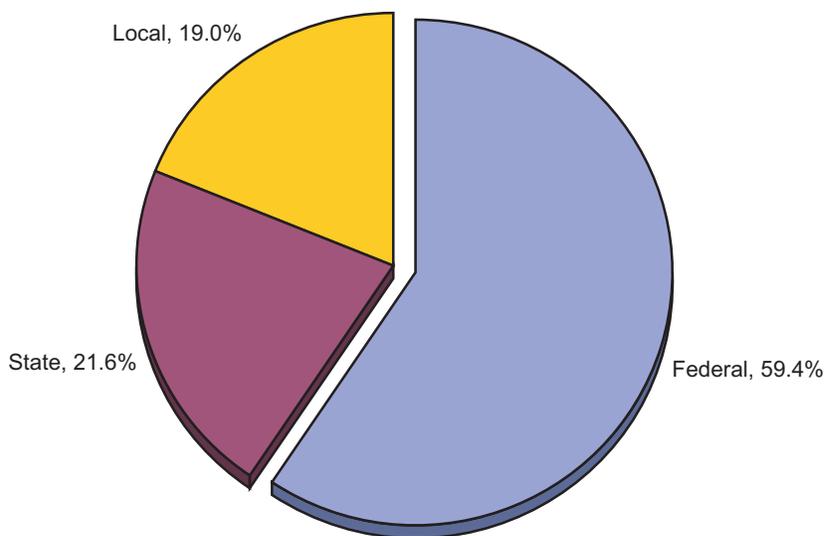
Domestic and international travel spending in Maryland generated nearly \$2.2 billion for the federal, state, and local government in 2005, up 4.3 percent from 2004. Domestic travel-generated tax revenue accounted for 96.5 percent of the state total in 2005.

Domestic travel spending-generated tax revenue for the federal government increased 3.7 percent from 2004 to \$1.2 billion in 2005. This represented 59.4 percent of all domestic travel-generated tax collections in the state (Figure 9). Each dollar spent by domestic travelers in Maryland produced 12.1 cents for federal funds.

Spending by domestic travelers in Maryland also generated \$451.6 million in tax revenue for the state treasury. This comprised 21.6 percent of all domestic travel-generated tax revenue for 2005 collected in the state (Figure 9). On average, each travel dollar spent by domestic travelers produced 4.4 cents in state tax receipts.

Local governments in Maryland also benefited from domestic travel in 2005. Domestic traveler spending generated \$398.2 million in sales and property tax revenue for the city and county governments, 19.0 percent of total domestic travel-generated tax revenue in the state (Figure 9). Each travel dollar spent by domestic travelers produced 3.9 cents for local tax coffers.

Figure 9 Domestic Travel-Generated Tax Revenue in Maryland by Level of Government Sector-2005⁸



The Hospitality and Tourism Workforce Profile

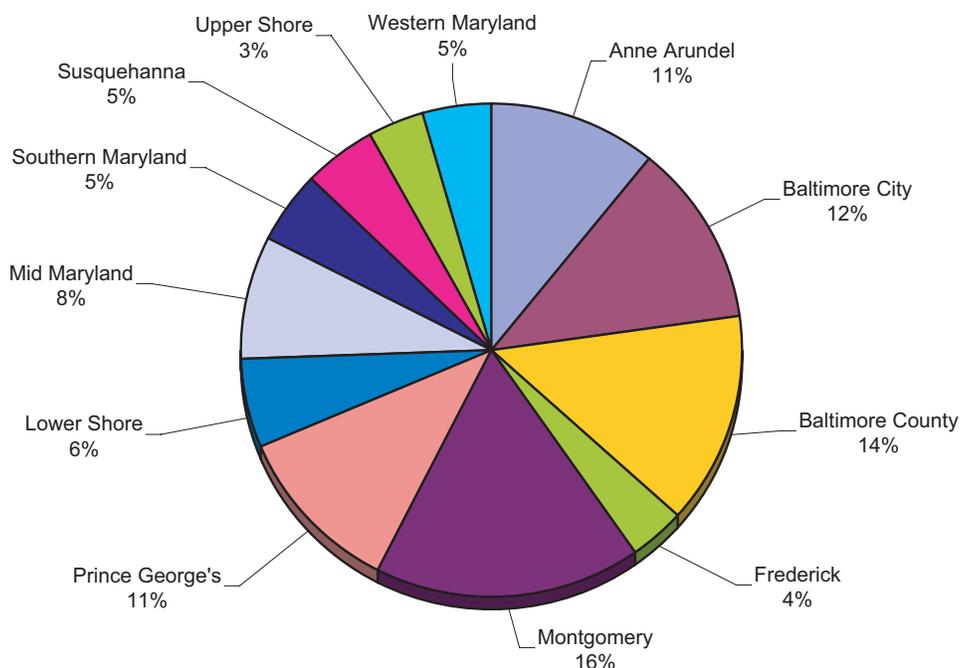
Today, about one in every ten jobs in Maryland's private sector is in the hospitality and tourism industry. The current workforce of almost 230,000 people is spread across 35 occupations and is as diverse as the industry itself. The industry employs skilled and unskilled workers for a tremendous variety of jobs that in 2005 earned average median hourly wages ranging from \$7.25 to \$38.75. The current labor force of part-time and full-time workers includes large numbers of seasonal laborers, high-school students, first-time job seekers, and foreign-born workers.

Most workers (72.2%) in the industry are employed in small businesses with fewer than 100 employees (Figure 1). The majority of the industry's workforce (71.3%) is

employed in the food-service segment (Figure 2) and earned an average weekly wage of \$271 in 2004 (Figure 3).⁶

The hospitality and tourism workforce is employed in varying concentrations throughout the state (Figure 10). Most of the workforce is employed in Montgomery County (17.1%), followed by Baltimore County (13.7%), Baltimore City (11.9%), and Prince George's County (11.2%), with the lowest concentration of the workforce are employed in the Upper Shore (3.4%) region and Frederick County (3.6%). The remaining workers are spread across six other regions, with employment shares ranging from 4.4% to 10%.⁶

Figure 10 Hospitality and Tourism Industry Workforce Concentrations Statewide⁶



Governor's Hospitality and Tourism Workforce Summit

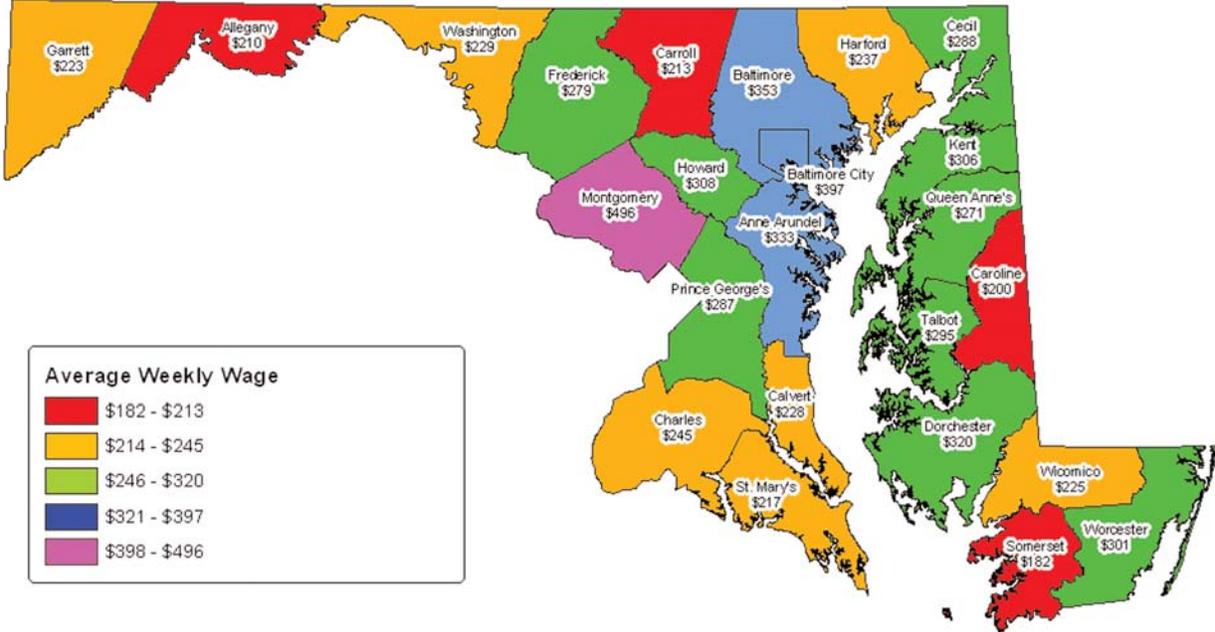
The hospitality and tourism workforce earns wages that vary across occupations (Table 2) and geographic regions (Figure 11). Of 35 defined occupations, only two have a

median hourly wage of more than \$20, 15 occupations earn hourly median wages ranging between \$10 and \$20, and 17 occupations earn less than \$10.⁶

Table 2 Hospitality and Tourism Industry Occupations ⁶

Occupation	Annual Openings			Training Code	Median Hourly Wage
	Growth	Replacements	Total		
General and 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 Supervisors/Managers of Food Prep/Serving Workers	280	375	655	8	\$14.00
First Line Supervisors/Managers of Housekeeping and Janitorial Workers	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 and Auditing Clerks	150	550	700	10	\$15.75
Secretaries, exc. Legal, Medical and Executive	230	835	1,065	10	\$14.50
General Office Clerks	695	1,165	1,860	11	\$12.25
Receptionists and 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/Transportation Ticket Agents/Travel Clerks	40	40	80	11	\$12.50
Landscaping and Groundskeeping Workers	675	435	1,110	11	\$11.00
Janitors and 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 Concession, 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

Figure 11 Average Weekly Wage by Jurisdiction⁶

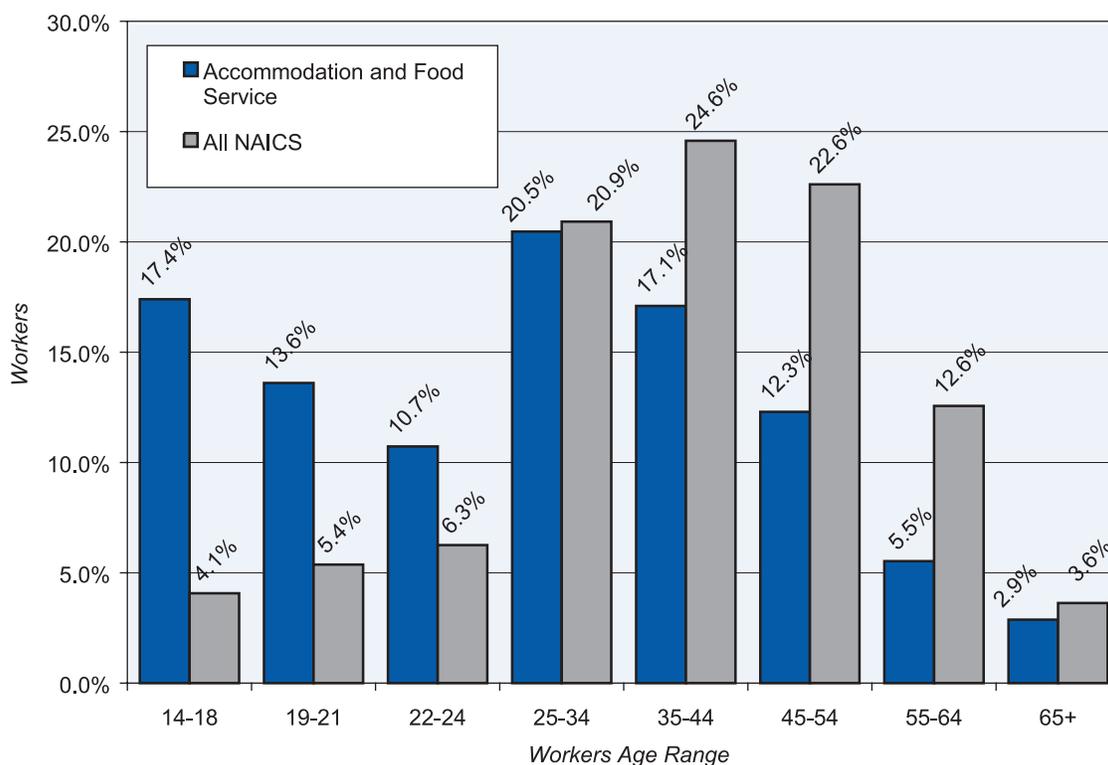


Most of the occupations (23 out of 35) in the hospitality and tourism industry require only limited education and are classified as needing short-term on-the-job training, with only one occupation, general and operational managers, requiring a bachelor’s degree or higher.

Workers in accommodation and food service tend to be younger than workers in other

industries.⁹ For example, people younger than 24 years of age account for 42% of workers in accommodation and food service, compared to 16% for all private industries in Maryland. Figure 12 compares the age range of workers in the accommodation and food service segments of the hospitality and tourism industry versus all industries (NAICS) in Maryland.

Figure 12 Age Range of Accommodation and Food Service Workers Compared to Total Industry Workers in Maryland⁹

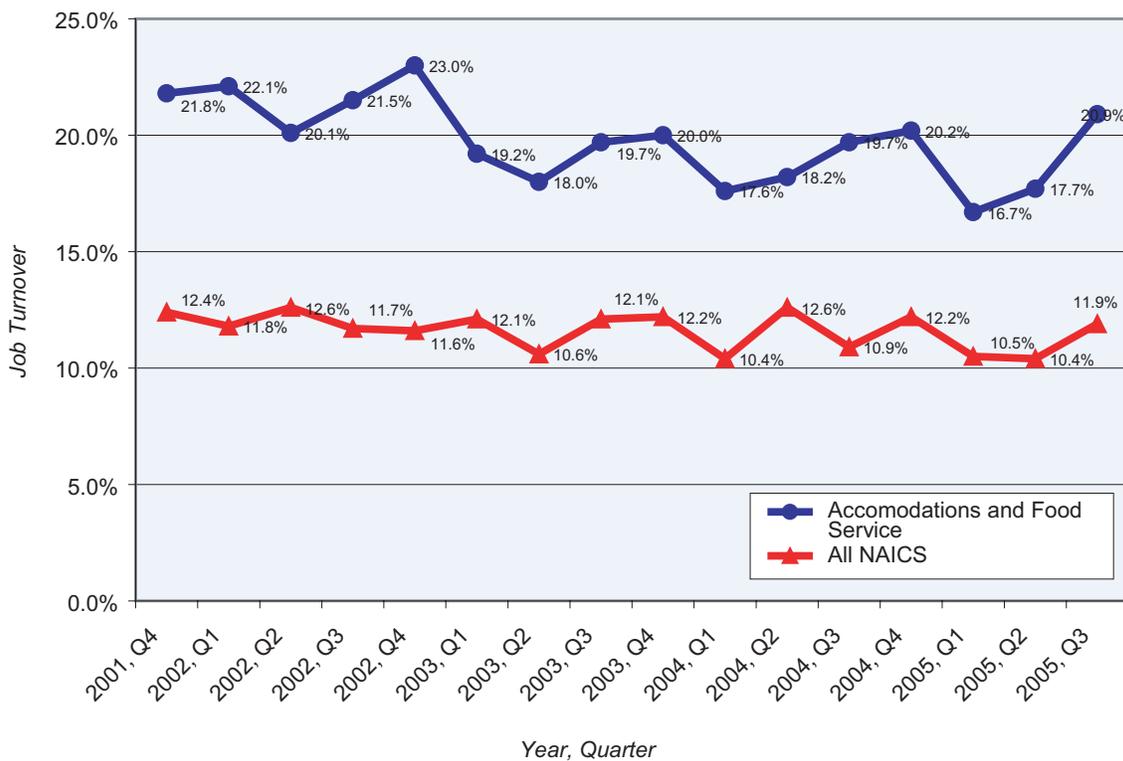


The turnover rate for the Maryland hospitality and tourism industry workforce is higher than the state's overall average turnover rate.⁹ Over the past few years, the accommodation and food service segment's turnover rate in Maryland has ranged from a low of 16.7% to a high of 23.0%, according to data from the U.S. Census Bureau's Local Employment Dynamic Program. By comparison, the turnover rate for all industries in Maryland has been much lower, ranging from 10.4% to 12.6% during the same time period. Figure 13 illustrates the turnover rates

of the hospitality and tourism industry versus all industries (NAICS) in the state of Maryland from fourth quarter 2001 through third quarter 2005.

According to the Bureau of Labor Statistics (BLS), workers in leisure and hospitality (roughly the equivalent of the GWIB Hospitality and Tourism sector) stay with their companies for the shortest period of time (median tenure is 1.9 years). By comparison, the overall median tenure of private sector workers is 3.6 years.

Figure 13 Job Turnover Rate in Maryland⁹



The Hospitality and Tourism Industry Workforce Issues

Problem Statement

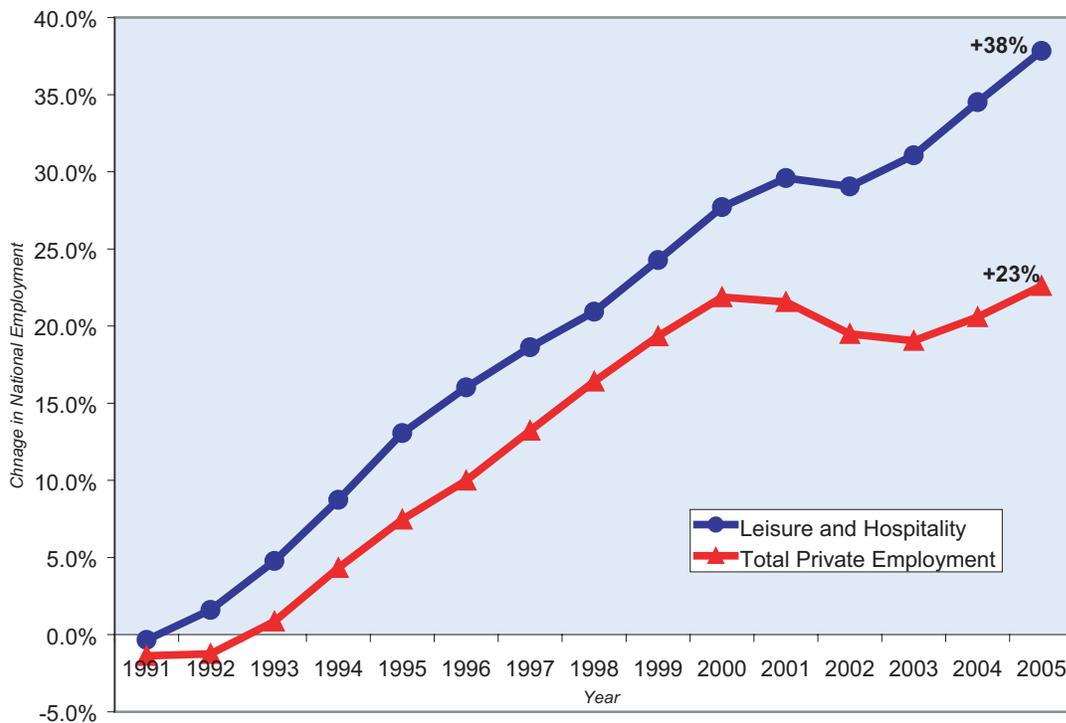
The primary workforce problem of the hospitality and tourism industry in Maryland today is that it does not have an adequate supply of suitable workers.² An industry with an inadequate workforce will not be able to attract and accommodate business and recreational travelers. If the workforce supply is not improved, it will damage the state's overall economy.

Supply and Demand

The hospitality and tourism industry is growing. Since 1990, total employment growth in the industry has outpaced the growth of total private employment in the United States (Figure 14).

Hospitality and tourism businesses are open more hours and more days during the year than ever before, and the number of people

Figure 14 Total Employment Change from 1990 to 2005¹⁰



who have access to and interest in leisure-time activities has increased.¹¹ Industry and government statistics predict that over the next five to 10 years the hospitality industry will have a shortage of an estimated 1.1 million workers. An estimated 1,068,525 openings (growth combined with replacement demand) will be added to the economy through 2012.

Along with the increased demand for workers, there is a shrinking supply. The traditional sources of workers continue to decrease. The baby boomers are reaching retirement age this year, while the next two generations are significantly smaller, leaving a significant gap in the labor pool throughout the country.² High turnover rates and discussions with industry employers indicate that incumbent workers are leaving hospitality and tourism businesses in large numbers due to dissatisfaction with real or perceived lack of benefits and advancement opportunities.¹¹ Hospitality and tourism business owners and employers are having more difficulty securing and retaining high-quality employees.



Concerns for Potential Employees and Employers

An assortment of issues contributes to the inability of the businesses within the hospitality and tourism industry to fill positions. The committee found the major concerns to be:

- Employees are unwilling to enter or remain in the industry due to negative perceptions about career choices, advancement, benefits, and compensation
- Potential employees are unaware of the variety of career opportunities available in the industry
- Potential employees are deemed unqualified because of a lack of skills or because employers cannot determine their skill level
- Potential employees are disqualified because of immigration status or because employers are unable to confirm immigration status
- Employers require a temporary seasonal workforce
- Employees are unable to enter, advance, or remain in the industry due to inadequate benefits and compensation
- Employers are unaware of labor-saving alternatives
- Potential employees are unable to enter the industry due to the lack of affordable housing near or transportation to and from places of employment

Addressing Workforce Issues

The committee's findings on each of the workforce issues and a list of the strategies it recommends to address each issue are presented in the following pages of this monograph. It will be the challenge of the participants in the summit's strategy sessions to review, edit, discuss, and prioritize these workforce issues.

Please note that these topics naturally overlap with respect to the issues raised and the strategies proposed to address them. In this monograph they have been separated by workforce issue for purposes of discussion. Details describing each recommended strategy are included in a separate section starting on page 37 of this monograph.

During the summit meeting work sessions, a facilitator will take the participants through an in-depth discussion of the issues in order to develop viable action plans at the conclusion of the summit.



Workforce Issue:

Industry Appeal

Employees are unwilling to enter or remain in the industry due to negative perceptions about career choices, advancement, benefits, and compensation

The GWIB Committee's research indicates that part of the apparent low workforce supply is due to the large number of people who are qualified to enter the workforce but are unwilling to make careers in the hospitality and tourism industry. Subcommittee investigations report that the public's perception of the hospitality and tourism industry is fundamentally inaccurate and inadequate in terms of career opportunities, job responsibilities, and professionalism.¹¹

The committee detected a widespread belief among potential workers that the industry only consists of low-paying service jobs that offer little opportunity for growth or advancement. Therefore, the hospitality and tourism industry is typically seen as being a temporary or pass-through workplace, that is, a place to work while learning a "more professional" trade in an institution of higher

learning or until more suitable employment can be obtained in an alternate industry. There is no recognition that the hospitality and tourism industry offers personnel the ability to progress to more responsible jobs within the industry.

The perception of the hospitality and tourism industry as offering low pay and poor benefits while demanding long hours is no longer realistic. These perceptions are based on historic comparisons of the hospitality and tourism industry with other industries, such as manufacturing, which showed noncompetitive earnings and benefits. The industry has changed in the last 20 years due to the increase in people who have access to and interest in leisure-time activities. Although some jobs in some locations still face these challenges, the potential to grow and move beyond them is greater.

Recommended Strategies

- **Continue to build partnerships with educational institutions and other workforce service providers. Details on this strategy provided on page 38.**
- **Improve and publicize benefits and career opportunities. Details on this strategy provided on page 39.**
- **Develop and disseminate recruitment plans. Details on this strategy provided on page 40.**
- **Develop an industry-wide marketing plan to improve the industry's image. Details on this strategy provided on page 41.**

Workforce Issue:

Industry Exposure

Potential employees are unaware of the variety of career opportunities available in the industry

The committee has identified several sources of potential employees—people who already reside in Maryland but for various reasons are unaware of their potential as valuable employees in the hospitality and tourism industry.² These potential worker populations include:

- Senior citizens
- Ex-offenders
- Immigrants
- Youth
- High-school graduates, including GED recipients
- Disadvantaged and disabled citizens
- Displaced workers, such as Katrina victims and others who have been forced to relocate due to natural disasters or other reasons outside of their control

- Clients of job transition centers, such as middle-aged workers who have been laid off or who are beginning second careers or stay-at-home parents who are reentering the job market
- Students in high school and college work-study programs

In addition, the mechanism between Maryland's hospitality and tourism industry and the state's workforce development system to promote and inform potential employees of the job possibilities in the industry appeared to need improvement. Lack of awareness about the system or limitations in the system itself seem to be weakening or limiting the connections between employers and potential employees.¹⁶

Recommended Strategies

- ***Continue to build partnerships with educational institutions and other workforce service providers. Details on this strategy provided on page 38.***
- ***Improve and publicize benefits and career opportunities. Details on this strategy provided on page 39.***
- ***Develop and disseminate recruitment plans. Details on this strategy provided on page 40.***
- ***Develop an industry-wide marketing plan to improve the industry's image. Details on this strategy provided on page 41.***

Workforce Issue:

Skills

Potential employees are deemed unqualified because of a lack of skills or because employers cannot determine skill level

Although Maryland ranks near the top in terms of having an array of measures associated with a skilled workforce and has one of the most highly educated workforces in the nation, there are still nearly a million residents who need basic employability skills, such as those that can be gained through GED or ESL classes, to be successful in hospitality and tourism careers.³ According to the 2000 Census/National Literacy Survey, literacy needs in Maryland are estimated to include 927,264 out-of-school youths, adults without high-school diplomas, and individuals who have English language needs.

Employers throughout the diverse businesses of hospitality and tourism respond that they welcome but do not easily find people with the job-readiness skills that are needed across the industry. Employers that responded to the GWIB Committee consistently stated that it was more important to them that their employees have basic job-readiness skills than certain industry-specific skills.¹² Some employers indicated a preference for teaching the industry-specific skills themselves to shape more valuable employees in their specific business. However, the general consensus is that the basic workplace skills that are essential to all segments of hospitality and tourism are:

- Having personal integrity, including honesty, reliability, dedication, and conscientiousness in carrying out work tasks
- Reading and writing standard English, speaking English so that it is easily understood by clients, and understanding common spoken English
- Being able to actively listen
- Having a service orientation
- Having social perceptiveness and sensitivity for American and global cultures, including common manners and body language communication
- Demonstrating critical thinking skills, including inductive and deductive reasoning, followed by thoughtful judgment, problem solving, and decision making

Additional qualities that potential employers seek for middle-management personnel and for those wishing to move up their career ladders include proficiency in:

- Grooming and dressing in a professional and appropriate manner
- Instructing associates
- Basic math
- Working in teams as both leaders and members

- Time management, including scheduling and planning
- Information processing, learning, and memorization
- Adaptability to change
- Creativity and originality in thought and decision making
- Information ordering and management
- Commercial negotiating

After analyzing the data, the committee determined that the important skills for the industry were being taught in the various learning institutions in Maryland but that:

- There was a portion of the population that was not in the programs that provided instructions on these skills.

- Employers did not know where to find potential employees who might already have these skills.
- Employers did not know how to access public workforce development programs and services that could help them train their employees who lacked these skills.
- Employers were not aware of assessment instruments that can assist them with recruitment of the best qualified candidates, nor are small businesses able to afford these services; the workforce development system can be a partner in providing such services individually or to hospitality associations.

Recommended Strategies

- ***Continue to build partnerships with educational institutions and other workforce service providers. Details on this strategy provided on page 38.***
- ***Improve and publicize benefits and career opportunities. Details on this strategy provided on page 39.***
- ***Develop and disseminate recruitment plans. Details on this strategy provided on page 40.***
- ***Develop an industry-wide marketing plan to improve the industry's image. Details on this strategy provided on page 41.***

Workforce Issue:

Immigration Status

Potential employees are disqualified because of immigration status or because employers are unable to confirm immigration status

The national immigration debate has an immediate impact on the supply of potential employees for the hospitality and tourism industry. While the industry does not support the hiring of illegal immigrants, it does advocate reforming the current system. Foreign-born people who want to be employed in Maryland must have a valid visa and have been granted official permission by an immigration officer to enter and remain in the country during the time of employment. This system is increasingly out of reach for most people wishing to live and work in the U.S. In practice, it is difficult and time-

consuming to navigate and all too often results in illegal immigration to the state. Limited programs exist to help people obtain legal entry into the country, such as the Diversity Visa Program;¹³ but again, the application process and eligibility requirements hinder most people, especially those who would be potential employees for the hospitality and tourism industry. In addition, onerous penalties are imposed on employers who inadvertently hire illegal workers, even if the employers have made good-faith efforts to verify worker documentation.

Recommended Strategies

- ***Support the development of a state liaison office for immigration issues. Details on this strategy provided on page 45.***

Workforce Issue:

Seasonal Workforce

Employers require temporary seasonal workforce

Many businesses in the hospitality and tourism industry such as parks, lodging, amusements, and restaurants attract a significantly varying number of customers depending on the season. These businesses cannot afford to retain a yearly workforce of the size that is required during their busiest months, so the expanding and contracting of customers with seasons requires a workforce that can expand and contract similarly.

Many traditional workers are financially unable or unwilling to accept positions that will only employ them for a portion of the year and therefore will choose to secure employment in other sectors that offer full-year employment. Frequently the places of employment are located far from potential employee's homes where transportation and/or housing is unavailable or unaffordable.

Today, populations willing to perform seasonal work include mostly U.S. resident and immigrant students. In Maryland, high schools and colleges are frequently in session through the Labor Day holiday. The result is that this eligible workforce is disqualified from employment in the industry during this high-demand period.

Foreign-born students are a good source of additional workers during the high-demand times throughout the year for many hospitality and tourism industry businesses. Seasonal differences in geographic locations around the world allow Maryland businesses with high winter demand, such as skiing resorts, to take advantage of the "summer" vacation

of students in the opposite hemisphere. The Exchange Visitor (J-1) Visa Program¹⁴ allows some temporary student visas but not enough to alleviate the current and forecasted workforce shortages.

The H-2B worker certification¹⁵ allows employers to hire some foreign workers for temporary nonagricultural work, including one-time, seasonal, peak load, or intermittent work. These workers are especially important in lodging and restaurant businesses for landscaping, food processing and preparation, cooks, and dishwashing positions but today the number of H-2B visas granted annually does not meet the hospitality and tourism industry need.

Additional seasonal workers may be available in nontraditional populations such as senior citizens, immigrants, the disabled, veterans, and ex-offenders; however, connecting them to hospitality and tourism positions today remains a challenge.



Recommended Strategies

- *Support the development of a state liaison office for immigration issues. Details on this strategy provided on page 45.*
- *Continue to build partnerships with educational institutions and other workforce service providers. Details on this strategy provided on page 38.*
- *Conduct research on transportation and housing concerns. Details on this strategy provided on page 47.*
- *Support a change in school-year calendar. Details on this strategy provided on page 48.*
- *Connect with nontraditional labor sources. Details on this strategy provided on page 42.*



Workforce Issue:

Benefits and Compensation

Employees are unable to enter, advance, or remain in industry due to inadequate benefits and compensation

Hospitality and tourism business owners are finding it more and more difficult to provide important benefits and compensation to their workers, such as health-care insurance and training for advancement. This is especially troublesome for small business owners. Potential and present workers are likely to

choose to work in competitive industries or in larger hospitality and tourism businesses that can provide these benefits, leaving small-business owners with a more difficult challenge in recruiting and retaining workers.¹⁶

Recommended Strategies

- *Improve and publicize benefits and career opportunities. Details on this strategy provided on page 39.*
- *Develop and disseminate recruitment plans. Details on this strategy provided on page 40.*
- *Help small-business owners to provide competitive benefits. Details on this strategy provided on page 49.*
- *Simplify grant applications for small businesses to train employees. Details on this strategy provided on page 50.*

Workforce Issue:

Labor-Saving Technology

Employers are unaware of labor-saving alternatives

Communication of labor-saving alternatives within the industry appears to be inadequate. The development and dissemination of information concerning these alternatives can give employers additional tools to alleviate worker shortages.

Recommended Strategies

- *Promote industry-wide conferences and meetings to communicate innovations and technology. Details on this strategy provided on page 51.*
- *Alert and advise employers about labor-saving alternatives. Details on this strategy provided on page 52.*

Workforce Issue:

Housing and Transportation

Potential employees are unable to enter industry due to lack of affordable housing near or transportation to and from places of employment

The lack of accessible and affordable housing and transportation across the state further limits the ability of potential workers to reach important hospitality and tourism places of employment. The state has beaches, mountains, cities, rivers, and bays, and all are integral to the hospitality and tourism industry. Although these features are the foundation of much of the hospitality and tourism

industry, they are frequently located in places distant from the homes of potential employees. This issue is twofold for parks. 1) In resort areas such as Ocean City and Deep Creek Lake, housing is expensive and highly competitive. 2) In other areas, such as southern and mid-western Maryland, public transportation is a limiting influence.

Recommended Strategies

- ***Conduct research on transportation and housing concerns. Details on this strategy provided on page 47.***

Details of Recommended Strategies

The committee's findings on each of the strategies it recommends for the workforce issues are described in detail in the following pages of this monograph. They are listed in the order that they have appeared in the monograph. It will be the challenge of the participants in the summit's work sessions to review, edit, discuss, and prioritize these strategies.

During the summit meeting work sessions, a facilitator will take the participants through an in-depth discussion of the issues in order to develop viable action plans at the conclusion of the summit.



Recommended Strategy:

Continue to build partnerships with educational institutions and other workforce service providers

Based on available data, the committee determined that the important skills for the industry were being taught in various learning institutes through Maryland, but that:

- There is a portion of the population that is not in the programs that provide instructions on these skills
- Employers did not know where to find potential employees who might already have these skills
- Employers did not know how to access public workforce development system programs and services that could help them train current employees who lack these skills
- Employers are not aware of assessment instruments that can assist them with recruitment of best qualified candidates, nor are small businesses able to afford these services; the workforce development system can be a partner in providing such services individually or to hospitality associations

The committee recommends that partnerships with educational institutions, government agencies, local One-Stop Career Centers and other workforce service providers be strengthened to help identify existing programs and any gaps in training and facilitate access to services that are already available. Specific actions include:

- Listing basic employability skills on a Web site and providing links to institutions providing that training

- Working with local school systems to adopt standards-based, industry-recognized career and technology education programs
- Encouraging local school systems to adopt Maryland's career development model, which will equip teachers, administrators, and counselors with the knowledge and skills needed to assist students and parents with career exploration
- Providing training modules for mentoring, coaching, and other necessary skills for midlevel management
- Encouraging distance learning and self-paced learning as delivery mechanisms to offset the varying work schedules in the industry
- Developing an orientation program based on workplace expectations that could be used by all of the industry's segments and by businesses of all sizes
- Instituting mentoring programs within the industry for new employees and providing incentive models to encourage employers to begin this initiative

The educational partnerships can address the following issues directly at the source:

- High-school counselors' lack of knowledge and information regarding the hospitality and tourism industry
- High-school students' lack of insight into careers available in the industry
- College students' lack of insight into the career potential of the industry

Recommended Strategy:

Improve and publicize benefits and career opportunities

Based on anecdotal and subjective studies, the committee found that the public's perception of the hospitality and tourism industry is fundamentally inadequate and inaccurate.

The general public underestimates the extent of the industry's economic impact and does not recognize its rewarding and professional career opportunities.

The committee recommends that a study of best practices in employee recruitment, recognition, benefits, wages, work environment, and advancement be conducted. The results of this study can be used to emphasize and reinforce the image of the hospitality and tourism industry as a modern and professional industry with superior career opportunities.

Recommended Strategy:

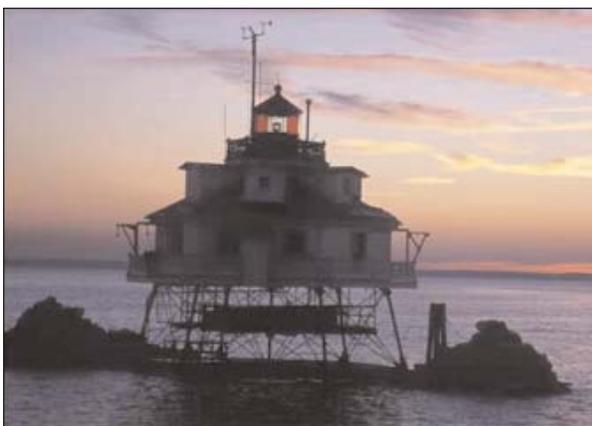
Develop and disseminate recruitment plans

The inadequate recognition and understanding of the industry's professional career opportunities are limiting the number of people entering the hospitality and tourism industry. Most industry jobs identified by the general public are still perceived to have poor advancement and earnings attributes, while the general public seems to be unable to see that several industry subsectors offer real career opportunities.

The committee recommends the development and dissemination of recruitment plans to inform and establish a pipeline of qualified workers to fill vacancies in the industry. The committee proposes that recruitment plans be developed to take advantage of the relationship between the hospitality and tourism industry and those places that can connect our industry with potential employees, such as Maryland's One-Stop Career Centers, high schools, community colleges, work development agencies, and community organizations.

The One-Stop Career Centers are a demand-driven workforce development system with a proven record of meeting business needs. They are located throughout the state and are concentrated in traditionally high-volume hospitality and tourism industry areas. A One-Stop Career Center recruitment program can be implemented statewide to build awareness with the center directors, provide hospitality and tourism job-posting capability, help position the industry as a prime career choice for the centers' clients, and encourage employers to access the centers themselves.

Sharing industry recruitment plans with high schools, community colleges, and community organizations can extend the reach of the industry's employers into potential employee populations and provide improved and accurate information.



Recommended Strategy:

Develop an industry-wide marketing plan to improve the industry's image

The principal solution recommended for all identified image and perception problems is making a commitment to the creation of an industry-wide marketing plan that develops a hospitality and tourism brand identity and extols and applauds the many benefits of working in the industry. The plan's target market can be as broadly defined as the prospective workforce, the incumbent workforce, and individuals and institutions that influence the career decisions of others. Because the potential vehicles and venues for delivering the messages are boundless, the committee recommends that professional guidance in identifying the best options be obtained.

A significant part of this plan includes publicizing industry successes, with affirming testimonials and accounts directly from and about industry members and publicly recognizing industry award winners for their achievements. These efforts will provide role models for the hospitality and tourism career workforce members and help them focus their career aspirations. Hospitality and tourism careers offer statewide and nationwide mobility, with transferable skills and job knowledge.

Recommended Strategy:

Connect with nontraditional labor sources

The committee found a supply of potential employees in untapped nontraditional labor sources in the state. The committee recommends that specific outreach programs be developed for nontraditional labor sources, such as senior citizens, immigrants, the disabled, veterans, youth, and ex-offenders—valuable potential populations of workers that the industry does not now easily connect with—including ways for employers to directly identify and connect with these potential employees. The committee recommends:

- Providing bridge programs through existing educational institutions, local One-Stop Career centers, and organizations that have direct contact with potential employees who do not have employability/ and/or occupational skills
- Assimilating all information on existing bridge programs for the unemployed as part of the clearinghouse and providing specific information on what each program provides
- Targeting special populations that could be a source of employees (for example, senior citizens, ex-offenders, youth, and the developmentally disabled) and making them feel welcome in the industry
- Developing partnerships between industry organizations (for example, Maryland Hospitality Education Foundation, Maryland Tourism Education Foundation, Maryland Recreation and Parks Association, Maryland Restaurant Association, Maryland Tourism Council, Maryland Hotel and Motel Association, and organizations that serve special populations) to address industry concerns, especially skill levels, tax incentives, liability and other issues pertaining to these nontraditional labor sources
- Developing relationships with nonprofit organizations to provide job-readiness training to establish a pipeline of their program participants who want to work in the industry
- Encouraging Maryland State Department of Education (MSDE) to add hospitality and tourism as “behind the fence” training for the incarcerated population and concentrate on those skills that could be offered on site (for example, customer service, waiting tables, and cashiering)
- Creating financial incentives, including tax credits and grants, for employers to provide English as a second language (ESL) training for incumbent workers

Recommended Strategy:

Create a statewide resource network and enhance funding for advancing basic employability skills

As the committee collected its information for this report, it became obvious that there are a variety of existing training programs, funding sources, and assessment processes. However:

- There is no one central place to access this information
- Employers that could use this information to enhance their workforce are unaware of the statewide resources that Maryland makes available to them

The committee recommends that:

- A database be created that provides access both to existing resources for improving basic employability skills and to potential employees and employers
- This database be publicized and promoted via the Internet, printed publications, and visits to educational institutions, local One-Stop Career Centers, and other workforce service providers.

Specific actions related to this database include:

- Providing easily accessible and understandable information about specific funding available for training potential and current employees in the hospitality and tourism industry, including specific examples of successful projects that have been funded
- Highlighting the services provided by One-Stop Career Centers in assisting small businesses in accessing training funds
- Creating training reimbursement programs for part-time employees
- Allowing for retroactive reimbursement for training to account for any timing or rescheduling issues because the industry is not on a set schedule
- Strengthening GWIB's ability to provide resource development, including grant-writing assistance, linkages to funding sources, and identification of potential partners

Recommended Strategy:

Support tax incentives for ESL and adult basic skills training

The lack of facility with spoken and written English and other basic employability skills is hindering a potential population of workers. Employers will be able, and more inclined to provide the training support for these skills if they are offered a financial incentive.

The committee recommends legislative initiatives that provide tax incentives to employers to train their employees in basic employability skills, including learning English as a second language.



Recommended Strategy:

Support the development of a state liaison office for immigration issues

Potential employees for the hospitality and tourism industry from the immigrant population need assistance to secure employment in the state. The committee recommends the creation of a state-level office devoted to connecting foreign-born workers with hospitality and tourism industry specialists and government officials to increase the number of legal immigrants employed in the industry. This office would also keep abreast of immigration issues and their impact on Maryland, assist in formulating policy and advocacy strategies, and keep state officials and hospitality and tourism employers up-to-date on policy proposals and changes. The office would participate in identifying potential workers and help them with the legal immigration process. It would also collect state statistics pertaining to immigration and the hospitality and tourism industry workforce and craft future initiatives to enhance the immigration process. The office would advocate for the hospitality and tourism industry's interests in the following programs.

National Guest-Worker Visa

The committee believes that the United States needs a guest-worker program that enables people to enter and work in the country when sufficient U.S. citizens cannot be found to meet the staffing needs of the hospitality and tourism industry.

The committee recommends supporting and informing advocacy groups that are working for new legislation targeted toward the needs of the hospitality and tourism industry.

H-2B Certification

Potential employees of the hospitality and tourism industry are available in the immigrant population; however, few are able to obtain legal working status in Maryland. Under the direction of the Department of Labor, H-2B worker certification allows U.S. employers to hire foreign workers for temporary nonagricultural work, including one-time, seasonal, peak load, or intermittent work. Currently, 66,000 foreign workers nationwide are permitted to receive the H-2B worker visas each fiscal year (October 1 to September 30).

The committee recommends that the hospitality and tourism industry actively support national advocacy groups interested in removing the annual cap for the number of H-2B visas granted.

Diversity Immigrant Visa

Potential employees for the hospitality and tourism industry from the immigrant population need assistance to secure employment in the state. The Diversity Immigrant Visa Program makes 50,000 permanent-residence visas available nationally to persons meeting simple, but strict, eligibility requirements. A computer-generated random lottery drawing is used to choose the applicants for these visas. The visas, however, are distributed among seven geographic regions, with a greater number of visas going to regions with lower rates of immigration, and with no visas going to citizens of countries from which more than 50,000 people have immigrated in the previous five years.

The committee recommends that strategies be developed to identify this population and promote opportunities within the industry.

Exchange Visitor (J-1) Visa

Foreign-born students are a good source of additional workers during the high-demand times for many hospitality and tourism industry businesses, such as lodging, amusements, and restaurants. The Exchange Visitor (J-1) Visa Program allows some temporary student visas but not enough to alleviate the current and forecasted workforce shortages.



Recommended Strategy:

Conduct research on transportation and housing concerns

Hospitality and tourism employees need transportation between their homes and workplaces that is clean, safe, dependable, and affordable. They also need workforce housing in locations that are beneficial to the industry and to the workers and their families.

The committee recommends workforce transportation and housing research to demonstrate the effect of the current transportation and housing conditions on the state's hospitality and tourism workforce.

A model for this research is the Governor's Task Force on Workforce Housing¹⁷ which addressed the need for permanent housing for critical public servants such as nurses, teachers, police officers, and first responders in the State of Maryland.

Recommended Strategy:

Support a change in school-year calendar

Currently, students are an important source of labor for hospitality and tourism industry. However, in Maryland, schools are frequently in session through the Labor Day holiday. The result is that this eligible workforce, especially high school and college students, are unavailable for work during this high-demand time without missing classes.

The committee recommends backing legislative initiatives that would allow public schools to establish a school year that begins after the federal Labor Day holiday. Making this change will allow the eligible workforce attending school, especially high schools and colleges, to be available for work during this high-demand time without missing classes. In addition, the committee recommends creating initiatives that revise internship opportunities by geographic location in conjunction with area educational providers to meet the demands of the industry's high seasons.

Recommended Strategy:

Help small-business owners to provide competitive benefits

Small-business owners are at a financial disadvantage when it comes to providing important benefits to their workers, especially health-care insurance. Potential and present workers are likely to choose to work in competitive industries or for businesses that can provide these benefits, leaving small-business owners with a more difficult challenge in recruiting and retaining workers.

The committee recommends that best practices and innovations be researched to make it possible for small-business owners to provide competitive compensation and benefits to their employees, especially in the area of medical insurance and health-care allowances.

Recommended Strategy:

Simplify grant applications for small businesses to train employees

Small-business grant applications are presently difficult to access and time consuming to complete for small-business owners. The result is that a number of small-business funding and resources are not being directed to the employers that need them.

The committee recommends supporting systematic changes in the grant application process to make funding more accessible to small-business owners, especially simplifying the application procedures and creating and promoting easily accessed portals to necessary information.

Recommended Strategy:

Promote industry-wide conferences and meetings to communicate innovations and technology

The communication of hospitality and tourism industry innovations and technology within the industry is currently limited. To improve the exchange of ideas and enhance learning within the industry, the committee recommends that hospitality and tourism representatives work with industry-specific vendors and/or industry consultants through conventions and meetings to obtain customer feedback with a view toward designing, developing, and implementing labor-saving technology solutions that will enhance service delivery to customers while maintaining service standards and customer satisfaction.

Recommended Strategy:

Alert and advise employers about labor-saving alternatives

Communication of labor-saving alternatives within the industry can be greatly improved. The development and dissemination of information concerning these alternatives will give employers additional tools to alleviate their worker shortages.

The committee recommends additional research on and the development of a communication system that will allow the industry to routinely inform businesses and employers of new workforce technology and supply details about alternative technology.

Department of Labor, Licensing and Regulation

The Maryland Governor's Workforce Investment Board (GWIB)

Overview

The Governor's Workforce Investment Board (GWIB) is Maryland's chief policy-making body on workforce development and is mandated by the Federal Workforce Investment Act. An executive order issued by the governor in 2004 expanded the scope of Maryland's GWIB to encompass all components of the state workforce development system. Board members include a number of the governor's cabinet secretaries and top level business and education leaders. They identify critical workforce investment issues that confront the state and develop strategies, initiatives, and policies that assist the governor and the workforce system to address these issues.

GWIB Vision

A Maryland where every person maximizes their career potential and employers have access to the human resources they need to be successful.

GWIB Mission

To guide a nationally recognized workforce development system that is aligned with the economic and educational goals of the State of Maryland and that will result in a qualified workforce available to the employers in the State of Maryland.

GWIB Strategic Plan

To fulfill this mission, GWIB has shifted to a demand-driven workforce development system that engages sector-based employers in defining demand and workforce issues and sets in motion regional partnerships among industry, education, and government to respond to those issues.

An industry sector is a group of similar businesses that shares a comparable workforce composition and faces a common set of labor market needs, opportunities, and concerns.

The GWIB worked collaboratively over one year with several other state agencies and business leaders to define 13 targeted industry sectors for employment development based upon the following criteria: 1) high population, 2) high growth or growth potential, and 3) critical to Maryland's economic development. State agency representatives involved in this process came from the Labor Market and Analysis and Information (LMAI) Office at the Department of Labor, Licensing and Regulation (DLLR), the Maryland Department of Business and Economic Development (DBED), the Local Workforce Investment Boards (LWIBS), the Maryland Higher Education Commission (MHEC), the Maryland State Department of Education (MSDE), and the Maryland Association of Community Colleges (MACC).

The 13 targeted industry sectors, including the hospitality and tourism sector, collectively represent 85 percent of the workforce in Maryland.

GWIB Center for Industry Initiatives

Under a grant awarded by the U.S. Department of Labor, GWIB established the Center for Industry Initiatives (Center). Using the sector-based model, GWIB/Center developed an industry initiative process that brings together and focuses various workforce development partners and stakeholders on a single outcome, a properly prepared workforce that meets the current and future demands of Maryland employers. The process is a collaboration of private and public sector stakeholders who create goals, strategies, and deliverables that advance the needs of the state's workforce and employers.

There are five phases in the Industry Initiative Process.

- | | |
|-----------|----------------------------------|
| Phase I | Get Organized |
| Phase II | Research and Assess the Industry |
| Phase III | Conduct the Industry Summit |
| Phase IV | Develop the Plan of Action |
| Phase V | Implement the Plan of Action |

An Appreciation

The Department of Labor, Licensing and Regulation and the Maryland GWIB appreciate the professional support, financial and programmatic assistance, and encouragement the U.S. Department of Labor (DOL) provided to the state of Maryland's industry initiatives.

The Maryland Governor's Workforce Investment Board (GWIB)

Hospitality and Tourism Industry Initiative



The Hospitality and Tourism Steering Committee

The Hospitality and Tourism Steering Committee was organized in March 2005. The GWIB board member and hospitality and

tourism industry leader is Brendan Keegan, Marriott International. The steering committee co-chairs are Tom Hall, president, The Thomas H. Hall Company and former executive with Six Flags Inc.; and Tom Warren, regional director operations, Morrison Management Specialists, with over 20 years' experience with Fortune 500-size hospitality firms.

More than 70 leaders from business, government, education, and nonprofit organizations serve on the steering committee. The mission of the hospitality and tourism industry initiative is:

"To provide continual and strategic industry leadership in education, employment, and economic development that will result in a qualified and available workforce to meet the current and future needs of Maryland's hospitality and tourism industry."

The steering committee has met monthly since its inception in 2005, and has followed

the industry initiative process laid out by GWIB. Several outcomes were sought through the process: 1) an accurate profile of the industry and workforce, 2) the identification of critical workforce issues that challenge the industry's ability to attract, hire, and retain talent, and 3) the development of an action plan to strengthen the pipeline of talent and to manage impending retirements in our workforce.

Industry Research

In order to develop an actionable strategic plan based upon the industry's critical workforce issues, the steering committee has used several methods to obtain current and relevant data about the industry and its workforce. Research included industry surveys; workforce and economic reports; regional studies; and special reports and summaries prepared by departments or experts in government, education, and workforce development. Existing data relevant to the industry workforce from a variety of national and state agencies, including the U.S. Census Bureau; the Maryland Department of Labor, Licensing, and Regulation (DLLR); the Maryland Department of Business and Economic Development (DBED); the U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages (BLS QCEW); and hospitality and tourism trade associations were evaluated.

Industry Monograph and Workforce Summit

Sodexo Inc., a member of the steering committee, donated the services of a technical writer to assemble the research and prepare an industry monograph. The monograph

presents an accurate profile of the industry and workforce and identifies critical workforce issues that challenge the industry's ability to attract, hire, and retain talent. The monograph will be reviewed and validated at the Hospitality and Tourism Workforce Summit on January 23, 2007, at the University of Maryland University College, The Inn and Conference Center, Adelphi, Maryland. Summit participants will confirm and prioritize workforce issues and possibly enhance and prioritize action recommendations (strategies, projects, and other actions) that engage the industry's workforce issues.

Plan of Action

A post-summit report will be published by March 2007. It will provide an overview of the summit's purpose, scope, and activities, and a summary of the industry's critical issues. It will be the first step in developing an industry plan of action that articulates the critical workforce issues identified by the industry; states the industry's goals; and lists recommendations chosen by the industry to achieve those goals, along with specific strategies.

The purpose of the plan of action is to achieve measurable results in workforce development. Implementing the industry plan of action starting in 2007 will take time and is dependent on the relationships and partnerships with state agencies, the state legislature, professional associations and education developed during the industry initiative process. The ultimate goal is a properly prepared workforce that meets the current and future demands of Maryland's hospitality and tourism employers.

Hospitality and Tourism Steering Committee 2005-2007

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Marriott International, Inc.

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Table 3 North American Industry Classification

Segment	NAICS	Business	Examples
Restaurant and Food/Beverage Services	7221	Full-service restaurants	Seated food and beverage service
	7222	Limited-service eating places	Fast-food restaurants, delis, cafeterias, takeout eateries, and delivered pizzas
	7223	Special food services	Food service contractors, caterers, and mobile food services
	7224	Drinking establishments	Bars and nightclubs that serve alcoholic beverages for immediate consumption
Lodging	7211	Traveler accommodations	Hotels, motels, state park cabins, conference facilities, and bed-and-breakfast inns
	7212	Public and private RV parks and recreational camps	Travel trailer/tent campgrounds, cabins, and recreation/vacation camps
Parks, Recreation, Attractions, and Amusements	7121	Museums, historic sites, parks, gardens, and similar institutions	National, state, county, and municipal parks; zoos; nature parks; gardens; and water, hiking, biking, and auto trails
	7131	Amusement parks and arcades	Amusement, theme, and water parks; and amusement arcades
	7132	Gambling industries	Casinos, lottery corporations, and gambling device operators
	7139	Other amusement and recreation industries	Resorts and Ocean City
	7111	Performing arts companies	Theater companies and dinner theaters, dance companies, and musical groups and artists
	7112	Spectator sports	Sports teams and clubs and racetracks
	7113	Promoters of performing arts and sports	Live performing arts productions, sports events, fairs, concerts, and festivals
	7114	Agents and managers for artists, athletes, entertainers, and other public figures	Agents and managers for authors, models, and speakers
	7115	Independent artists, writers, and performers	Freelance individuals primarily; people engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions
Travel and Tourism	4871	Scenic and sightseeing transportation; land	Sightseeing buses, Civil War trails, team train trips, and horse-drawn carriages
	4872	Scenic and sightseeing transportation; water	Harbor tours, dinner cruises, canoe and kayak rentals, and charter fishing boat services
	4879	Scenic and sightseeing transportation; other	Aerial tramways, hot-air-balloon rides, and glider excursions
	5615	Travel arrangement and reservation services	Travel agents
	56192	Convention and trade show organizers	Managers, organizers, and promoters of automobile shows, conventions, craft fairs, flower shows, home shows, trade fairs, and trade shows

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