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Tourism, Food Service and Lodging Survey and Labor Market Analysis: Final Report

Prepared for –
The Northeast Partnership for Hospitality, Tourism
and Food Service

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Background

Under a grant from the Massachusetts Workforce Competitiveness Trust Fund, the Northeast Partnership for Hospitality, Tourism, and Food Service contracted with the North Shore Workforce Investment Board to collect and analyze labor force data in the hospitality, tourism, and food service industry in the Northeast of Massachusetts. This information will identify the education and training needs of employers; support the creation of career ladders in the three areas of this industry; lodging, food service, and tourism; and support an implementation plan to reach, train, and place employees in this industry.

Primary responsibilities of the consultant:

- Gather regional data on employers and workforce trends
- Develop written survey instruments and use in regional research

Methodology

Data Collection: Industrial information was gathered from the Massachusetts Executive Office of Labor and Workforce Development's Employment and Wage Survey Program. *Employment and Wage (ES-202) data are derived from reports filed by all employers subject to unemployment compensation laws, both state and federal.*¹ The ES-202 program uses The North American Industrial Classification System (NAICS)² to categorize establishments and provide statistical information on them. The Tourism industry falls into the Arts, Entertainment, & Recreation (sector 71) which includes three sub-sectors Performing Arts, Spectator Sports, & Related Industries (sector 711), Museums, Historical Sites, & Similar Institutions (sector 712), and Amusements, Gambling, & Recreation (sector 713). Lodging and Food Service both fall within the Accommodation & Food Services (sector 72). There two sub-sectors within the Accommodation & Food Services industry, Accommodation (sector 721) is used for Lodging and Food Services & Drinking Places (sector 722) is used for Food Services. Three geographical locations were used as the basis from which data was extracted. These geographical locations are the North Shore Workforce Investment Area, the Greater Lowell Workforce Investment Area, and Merrimack Valley Workforce Investment Area. Together these three areas form the Northeast of Massachusetts.

Survey: Survey instruments were developed by the consultant for the Hospitality, Tourism, and Food Service Industries. The surveys were designed to gather information pertaining to the training needs of employers, the occupations in demand, and critical human resources issues facing the industries. Draft surveys were presented to the Steering Committee and with minor changes, the surveys were deemed acceptable.

¹ Massachusetts Division of Career Services, Employment & Wage Survey Program, www.detma.org

² Kaznocha, NAICS Desk Aid, Massachusetts Division of Career Services, 2002

Surveys were conducted by mail, email, and over the phone to businesses through out the Northeast of the Massachusetts.

Northeast Tourism, Lodging, and Food Services Survey Results

Three surveys questionnaires were developed and distributed to business within the Northeast of Massachusetts. There was one survey for each the sectors; Tourism, Lodging, and Food Services. These surveys were distributed through a combination of email, mail, and phone surveys. Survey participants were selected through a combination of using contact information gathered from The Northeast Partnership for Hospitality, Tourism, and Food Service (contributing partners include: North Shore Community College, Northern Essex Community College, Middlesex Community College, MLA Education Foundation, Inc. and The North of Boston Visitors and Convention Bureau) and from mailing lists generated from the America's Labor Market Information System (ALMIS).

A total of 751 surveys were sent to businesses involved in the Tourism, Lodging, or Food Service industry throughout the Northeast of Massachusetts. There were 41 responses for response rate of 5.4%.

In addition to the surveys, interviews were conducted with companies to be able to retrieve more information from the employers. A total of 18 employers were interviewed. Below is summary data from both the survey and in-person interviews conducted.

NSWIB Summary Report – Labor Market Information 10/3/2007

Survey Distribution Information:

- Number of Surveys Mailed/Emailed out #__709³
 - Number of Food Service Surveys #__356
 - Number of Lodging Surveys #__164
 - Number of Tourism Surveys #__231

- Geographic Distribution all surveys
 - Greater Lowell #__166
 - Merrimack Valley #__216
 - North Shore #__336
 - Out of Area# __27

- Responses
 - Number of Food Service Surveys #__17
 - Number of Lodging Surveys #__9
 - Number of Tourism Surveys #__15
 - Greater Lowell #__10

³ 42 hotels received both the food service & lodging surveys

- Merrimack Valley #__12
- North Shore #__19

Interviews:

From	Interview Result
Northern Essex	4 Completed
North Shore	9 Completed
Middlesex	5 Completed

Preliminary Data:

1. About how many people are employed in your company today? (Northeast employment only please):

Food Service Average: 40.5 employees⁴
 Tourism Average: 11 employees⁵
 Lodging Average: 68.7 employees

- a. About how many are part-time?

Food Service Average: 26.9 employees
 Tourism Average: 5.6 Employees
 Lodging: 30.75 Employees

- b. About how many are seasonal?

Food Service Average: 12.4 Employees
 Tourism Average: 1.1 Employees
 Lodging: 9.3 Employees

2. Approximately what percentages of all positions at your company are open to candidates with different education levels, from less than a high school degree on up to graduate degrees? Please list what percent of all positions are open to people with these educational levels:

	Food Service	Lodging	Tourism
Less than high school degree or GED	24%	60%	7%
High school degree or GED only	46%	24%	15%
Associates (2 year) degree	15%	6%	18%
Bachelors (4 year) degree	13%	7%	54%
Masters degree or higher	2%	3%	6%

⁴ Removed Corporate Chefs from average because of high employment figure (550)

⁵ Removed Elderhostel from average because of high employment figure (200)

3. Could you please list the number of openings, and the number of openings filled for each position you have had in the past year? This is for jobs that are generally considered entry level. (skip if there were no new openings)

Top Three Job Openings for Occupations requiring less than an Associate's Degree

Industry	Food Service	Lodging	Tourism
Occupation	Food Preparation Workers	Maids & House Keeping	Tour Guides
<i>Openings</i>	221	55	16
<i>Filled</i>	218	45	3
<i>Starting Wage</i>	\$9.09	\$8.09	<i>Volunteer</i>
Occupation	Wait staff⁶	Front Desk Clerks	Tour Coordinators
<i>Openings</i>	96	34	5
<i>Filled</i>	110	31	4
<i>Starting Wage</i>	\$3.97	\$9.43	\$26,000
Occupation	Line Cooks	Office Support	Receptionist
<i>Openings</i>	78	6	3
<i>Filled</i>	75	6	6
<i>Starting Wage</i>	\$10.71	\$12.01	\$9.65

4. What were the reasons for openings in Question 3? Please estimate how many of the openings you listed above were due to these reasons: (skip if there were no new openings)

	Food Service	Lodging	Tourism
New business needs	81	4	11
Replacement of employees who retired	16	10	1
Replacement of employees who left for other positions	169	83	8
Replacement of employees who obtained an internal promotion	132	16	4

⁶ A few companies hired more wait staff than originally anticipated. Hence the higher number of hires, than openings.

Other (Please describe)	Seasonal Demand	Maternity Leave, Terminated, Seasonal Demand	Termination, Restructuring of Responsibilities, Returned to School
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5. What are the advancement opportunities for workers with less than an Associates degree at your company?

Food Service:

- “There are no advancement opportunities. Small company.”
- “Line chef to Sous chef to head chef (if really good)”
- “There are many opportunities for advancement as Marriott trains from within.”
- “Workers who are savvy & have experience can advance.”
- “Management”
- “Minimal to none”
- “There are very limited opportunities for advancement”
- “Bar Manager & Dining Room Manager”
- “We are a small family business. Not much room for advancement”

Lodging:

- “Good Opportunities if they have developed strong language skills and take advantage of cross-training and are flexible with scheduling. Tuition reimbursement is available and free on line training”
- “Cross-training opportunities in other departments, most management level positions can be obtained through levels of in-house training.”
- “Hard works, speak English, learn, and go above & beyond - Supervisor position.”
- “Any line mgmt position based on experience.”
- “The opportunities for advancement are very good.”
- “With good organizational skills, all positions are open.”
- “Rooms care mgr, Sales Coordinator, Guest Care Manager, Chief Engineer”

Tourism:

- “No advancement opportunities for any degree with a staff of one”
- “Candidates are encouraged to apply for positions that become open.”
- “Very Limited. Call Center Associates can advance to supervisor without a degree. It is not actual degree that is critical, it is the ability to communicate professionally, both verbal and in writing that is key. We do not see this competency in our employees with less education. If an employee with a Bachelors Degree cannot write a professional memo or email or does not speak in a professional manner s/he would not be considered for promotion.”

“We have VERY LOW turn over in our employees and promote from within as people retire or move on.”

“Since we are a small travel business. We really do not have opportunities for advancement into higher level positions. However, depending on the employees’ willingness to advance his or her learning of the travel industry, attend seminars, and improve productivity and sales, employees can increase their earning potential. Entry level employees begin with reception work and filing; as they progress with knowledge of the industry they will begin working with travel reservations and research.”

“All positions are volunteers, except for one house keeper.”

“We have a small operation. Not much room for vertical movement in any position.”

“Clerks do not have any opportunity for advancement. Shipwrights can become lead or senior shipwrights.”

“None”

6. Could you please list the number of openings, and the number of openings filled, for each position you have had in the past year? This is for jobs requiring a degree or extensive work experience. (skip if there were no new openings)

Top Three Job Openings for Occupations requiring an Associate’s Degree or Higher

Industry	Food Service	Lodging	Tourism
Occupation	General Managers	Sales Managers	Tour Managers
<i>Openings</i>	12	9	5
<i>Filled</i>	12	7	5
<i>Starting Wage</i>	24.91	\$16.91	\$18.26
Occupation	Head Chef	Assistant Managers⁷	Accountants
<i>Openings</i>	12	7	2
<i>Filled</i>	10	8	2
<i>Starting Wage</i>	\$22.50	\$16.50	\$26.82
Occupation	Sous Chef	General Managers	Sales/Marketing
<i>Openings</i>	10	3	2
<i>Filled</i>	9	2	2
<i>Starting Wage</i>	\$17.37	\$26.92	\$12.00

⁷ One companies hired more assistant managers than originally anticipated. Hence the higher number of hires, than openings.

7. What were the reasons for openings in Question 6? Please estimate how many of the openings you listed above were due to each set of reasons: (skip if there were no openings)

	Food Service	Lodging	Tourism
New business needs	4	1	9
Replacement of employees who retired	2	0	0
Replacement of employees who left for other positions	13	6	4
Replacement of employees who obtained an internal promotion	10	7	2
Other (Please describe)	None	None	None

8. How, generally, do you fill these positions?

Entry Level Positions	Food Services	Lodging	Tourism
Newspaper advertisements	9	5	3
Word of Mouth	12	4	5
On-line advertising	4	6	6
Career Center Advertising	2	0	1
Referral from Training Program/College Program	1	0	3
Employee Referral	12	7	4
Other, please specify:	Walk ins (1)	0	Hires Interns (1)

Associate Degree or Higher Positions	Food Services	Lodging	Tourism
Newspaper advertisements	8	4	2
Word of Mouth	7	4	6
On-line advertising	4	5	4
Career Center Advertising	2	0	1
Referral from Training Program/College Program	2	0	2
Employee Referral	8	4	3
Other, please specify:	Company online HR (1), Walk ins (1)	College Recruiting (1)	0

9. What are the advancement opportunities for workers with Associates degree or higher at your company?

Responses:

Food Service:

“Not a lot, small chef owned restaurant”

“Managerial/Supervisor Responsibilities”

“With the Proper motivation and drive any position in the hotel is attainable”

“Experience & Ability count most. Supervisor - Assistant Manager - Manager”

“There is nothing in place now. Family owned & run business.

Advancements of this kind would be rare, if any.”

“More than 3x the number of employees with an associate degree get promoted than those without an associate’s degree.”

“None”

“The advancement opportunities are very good”

Lodging:

“Supervisor & Manager”

“Great. Much on the job training and promotional opportunity exists. Tuition Reimbursement benefit available to all. Required 40 hours of training per year for managers and 20 hours of training per year for hourly associates. On-line Harvard eLearning classes, web classes and instructor led classes are required. Marriott’s philosophy is we can teach most technical skills as long as you have the attitude and aptitude for advancement.”

“Management (sales, restaurant, hotel)”

“Almost any Management position in the hotel besides accounting”

“Guest Care Mgr, Rooms Care Mgr, Sale Mgr, Chief Engineer, General managers, Operations Manager.”

“Manager (Sales, office, finance)”

“Supervisor & Manager”

Tourism:

“Some Advancement opportunities in the call center in Lowell, such as supervisor. That is not to say that we do not have supervisors and managers without degrees currently, but it is less likely that a non-degreed person will advance.”

“There is no clear ladder of advancement.”

“When a position is open it is posted and anyone in the company may apply.”

“Lateral Moves available, but little vertical movement available in very small organization”

“Supervisors, Manager, Directors”

“None”

10. What difficulties, if any, do you have finding and retaining workers with particular skills or qualifications? (Check all that apply)

	Food Service	Lodging	Tourism
Lack of English language skills	7	4	0
Lack of a high school diploma	1	0	0
Lack of an Associates degree	0	0	1
Lack of a Bachelors degree	0	0	1
Lack of industry certification	3	2	1
Lack of related work experience	12	2	3
Lack of applicants altogether	10	2	2

Other, please specify:

Reasons:

F= “Weak work ethic, performance when hired”

L= “Poor candidates, unrepresentable no work base, hotel experience”

“Many applicants with little or no work related experience or First Job.”

T= “Lack of dedication/diligence among younger workers”

“Lack of good customer service skills and ability to work independently

“As a nonprofit, our salary scale lags for-profit market, so we lose staff for salaries. There is always high turnover in call center and we have lots of for-profit competition in the greater Lowell area. Applicants lack of professional communications skills.”

“We haven't had any difficulty finding workers with the exception of skilled shipwrights”

11. What are the most critical human resource issue facing the hospitality industry and why? (e.g. recruitment, retention, transportation, childcare, or flex scheduling for your employees etc.?)

Responses:

Food Services:

“Not enough people to do the job. Industry is growing faster than the number of qualified candidates.”

“Young people not wanting to work. Decrease in number of immigrants available.”

“MA is gone! Look to a new state for Business!”

“For me it is recruitment, finding experienced workers

“Comprehensive Insurance for employees. Scheduling for students who are returning to school and can not work the hours the restaurant wants them to work. It is tough to retain employees because there are so many companies to work for that it makes it easy to change restaurants.”

“Insurance is a big issue.”

“Recruitment”

“Lack of Transportation.”

“Recruitment & Transportation.”

“Hiring the right person for the job is challenging at times.”

“Retention & flex scheduling.”

“Lack of Wait staff with experience. We have flex scheduling. Knowledge of Food Service Industry”

“Finding Good Help. Keeping good help. Benefits and insurance.”

“Massachusetts laws on Alcohol, there is no individual responsibility.”

“Retention”

“Recruitment for line level employees.”

Lodging:

“Our economic model is very tight. Wages are compressed due to shortage of industry on the North Shore. We need more industry here. Overbuilt supply of hotel rooms and low occupancies keep wages low. We offer opportunity for people to grow. The industry provides a great career start to our workers.”

“Recruitment- leaves gaps open to long. Poor training program (basic skills)”

“Recruiting and retaining the right people.”

“Recruitment, Retention”

“Immigration status, language”

“Retention and informing associates of their benefits”

“Retention & Childcare”

“Recruitment: Finding people with the right people skills”

Tourism:

“The seasonal nature of the industry makes it difficult for us to fill weekend fall positions. Our shop clerks go back to school, but we have too few hours to attract substitutes.”

“Non-Profit Funding”

“Retention/quality workers”

12. Does your company offer training for your employees?

	Food Service	Lodging	Tourism
Yes	15	5	10
No	2	4	5

If Yes, what type:

F= "In house training on our policies & techniques."

"In house, Varies by position"

"Food serve safe, management training. Bar Code"

"On hand, Tips. It's scrambling eggs not much training is needed"

"Mentor programs, training for positions, Management, seminars"

"Three day written program and floor time."

"In House tips/training. Out of house for some."

L= "Scheduled hand on training"

"Instructor led classes, daily 15 minutes of hospitality training, web conferences, certifications for wine, beer, cleanliness, systems, AV, front office, engineering & maintenance skills, 'Dirt School', sales, finance, how to make a bed, clean a room, set a conference room, safety training and proper lifting."

"On the job - paid training"

"On hand, on-line"

T= "In house training"

"On job -tips, hints"

"GDS, supplier and product training, element K, online job specific training, customer service"

"Individual training; attend seminars and workshops offsite, access to online tutorials."

"One on one with curator"

"If necessary / what is needed"

"Peer to peer"

13. Does your company offer tuition reimbursement?

	Food Service	Lodging	Tourism
Yes	6	5	3
No	11	4	12

If Yes, what type:

F= "Will pay 50% of cost for college course if there is a grade of B or better."

“High School Students and College bound students can earn money towards school books for working through the summer and completing schedule requirements.”

“Managerial training”

“Safe Serve only.”

L= “Tuition Reimbursement for full-time associates who have worked one year and going to hospitality business related classes.”

“100% of eligible expenses ranging from \$500 - \$2000 per year based on length of service. Classes must industry related (i.e. related to some part of Marriott's business) Non-industry-related courses, if they are a requirement of a degree program and the degree program in industry-related.”

“Reimbursement plan”

“To meet educational requirements for realtors or for certification programs.”

T= \$5,000 per year for college accredited courses - Bachelors Degree or Higher.
We included online courses if they are for credit.

SUMMARY OF RESULTS:

- Majority of employers who responded to the survey were small with under 60 employees – the tourism companies were even smaller averaging 5 employees;
- Majority of jobs in this industry require less than a college degree, indicating that basic training would be the need within these companies;
- Most job openings are due to employee turnover rather than company growth, indicating a recruitment and retention issue;
- The tourism industry has a large contingent of ‘volunteer labor’ as well as seasonal contract labor;
- Hands on (on-site) training is valued by employers in these industries;
- Large chain companies provide a more traditional work environment than other, smaller companies; career ladders in these larger companies are more prevalent than in small companies, where ladders seem to be non-existent; and
- Companies are in need of employees with solid work ethic, communication and customer service skills.

Northeast Tourism, Lodging, and Food Service Data

This section shows employment & establishment data within Arts, Entertainment, and Recreation Industrial sub sectors and the Accommodation & Food Services Industrial sub sectors. Arts, Entertainment, and Recreation Industrial sub sectors are Performing Arts and Spectator Sports, Museums, Parks and Historical Sites, and Amusement, Gambling & Recreation Industries; these sub sectors make up the Tourism Industry. The Accommodation & Food Services sub sectors are Accommodation and Food Service and Drinking places. The Lodging Industry is represented by the Accommodation sub sector and the Food Services Industry is represented by the Food Services and Drinking Places sub sector. Information is provided for the Northeast of Massachusetts, the North Shore, Merrimack Valley, and Greater Lowell.

Table 1

Northeast Job Vacancy 4th Q 2006⁸	Vacancy number	Vacancy Rate
Total, all industries	11,698	3.1%
<i>Accommodation & Food Services</i>	1,079	3.6%
<i>Arts, Entertainment & Recreation</i>	- ⁹	1.0%

Table 2

Number of Establishments 4th Q 2006¹⁰	North Shore	Merrimack Valley	Greater Lowell	Northeast Total
Total, all industries	11,956	8,689	6,755	27,400
Leisure and Hospitality	1,215	787	608	2,610
Arts, Entertainment, and Recreation	249	147	99	495
<i>Performing Arts and Spectator Sports</i>	34	24	14	72
<i>Museums, Parks and Historical Sites</i>	29	8	8	45
<i>Amusement, Gambling & Recreation</i>	186	115	77	378
Accommodation and Food Services	966	640	509	2,115
<i>Accommodation</i>	67	31	20	118
<i>Food Services and Drinking Places</i>	899	609	489	1,997

Northeast Establishments 4th Quarter 2006

In the 4th Quarter of 2006, there were 2,610 establishments in the Northeast Region Tourism, Lodging, and Food Services Industry. Figure 1 shows Northeast establishments by Tourism, Lodging, and Food Services Industrial sub sectors. The Northeast accounted for about 14.2% of the 18,356 establishments in Tourism, Lodging, and Food Services sector in Massachusetts. The two Tourism, Lodging, and Food Services Industry sub sectors with the largest number of establishments are Food Services and Drinking Places (1,997 establishments) and Amusement, Gambling, and Recreation (378 establishments). These two sub sectors account for nearly 91% of all Tourism, Lodging, and Food

⁸ Massachusetts Division of Career Services, Job Vacancy Survey 4th Q 2006, www.detma.org

⁹ Information has been classified by the Massachusetts Division of Career Services

¹⁰ Massachusetts Division of Career Services, ES-202 program, www.detma.org

Services establishments in the Northeast Region. The two sub sectors with the smallest number of establishments in the Northeast Region are Museums, Parks, and Historical Sites (45 establishments) and Performing Arts and Spectator Sports (72 establishments).

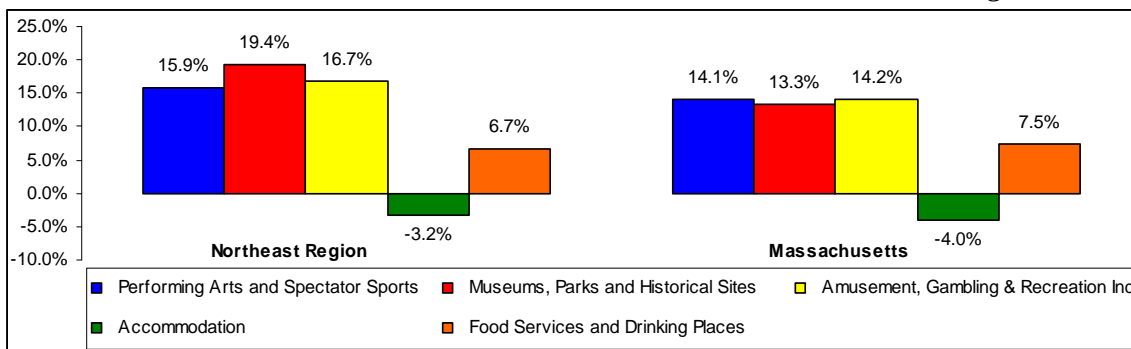
Figure 1



Northeast Establishment Growth 2001 to 4th Quarter 2006

Figure 2 shows establishment growth from 2001 to the 4th quarter 2006 for the Northeast Region and Massachusetts in the Tourism, Lodging, and Food Services sub sectors. Establishment in the Northeast increased 8% adding 193 establishments, while Massachusetts employment increased 7.7% adding 1,318 jobs. The sub sectors in the Northeast with establishment increases are Museums, Parks, and Historical Sites (19.4% increase), Amusement, Gambling, and Recreation (16.7% increase), Performing Arts and Spectator Sports (15.9% increase), and Food Services and Drinking Places (6.7% increase). The sub sector in the Northeast that had establishment decrease are Accommodation (3.2% decrease).

Figure 2

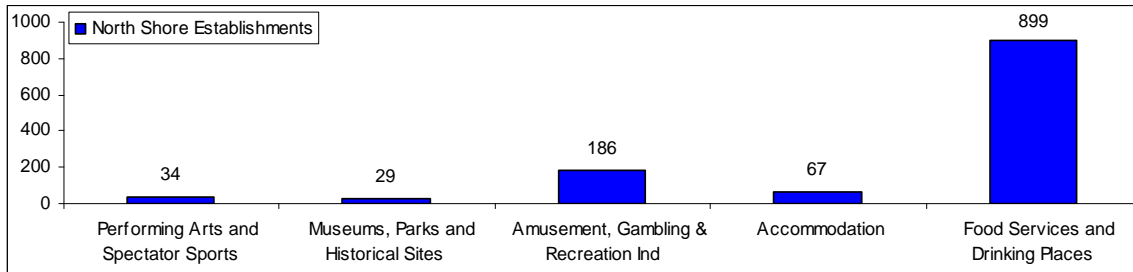


North Shore Establishments 4th Quarter 2006

In the 4th Quarter of 2006, there were 1,215 establishments in the North Shore Tourism, Lodging, and Food Services sector. Figure 3 shows North Shore establishments by industrial sub sector. The North Shore accounted for about 46.5% of the 2,610 establishments in Tourism, Lodging, and Food Services sector in Northeast Region. The two Tourism, Lodging, and Food Services sub sectors with the largest number of establishments are Food Services and Drinking Places (899 establishments) and Amusement, Gambling, and Recreation (186 establishments). These two sub sectors account for about 89% of all Tourism, Lodging, and Food Services Industry establishments on the North Shore. The two sub sectors with the smallest number of

establishments on the North Shore are Performing Arts and Spectator Sports (34 establishments) and Museums, Parks, and Historical Sites (29 establishments).

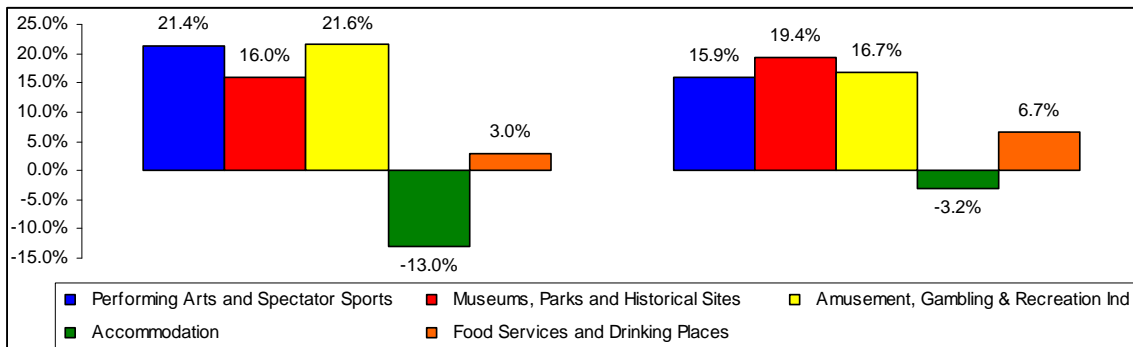
Figure 3



North Shore Establishment Growth 2001 to the 4th Quarter 2006

Figure 4 shows establishment growth from 2001 to the 4th quarter 2006 for the North Shore and the Northeast Region in the Tourism, Lodging, and Food Services sub sectors. Establishment on the North Shore increased 5% adding 59 establishments, while the Northeast increased 8% adding 193 establishments. The sub sectors on the North Shore with establishment increases are Amusement, Gambling, and Recreation (21.6% increase), Performing Arts and Spectator Sports (21.4% increase), Museums, Parks, and Historical Sites (16% increase), and Food Services and Drinking Places (3% increase). The sub sector on the North Shore that had establishment decrease are Accommodation (13% decrease).

Figure 4

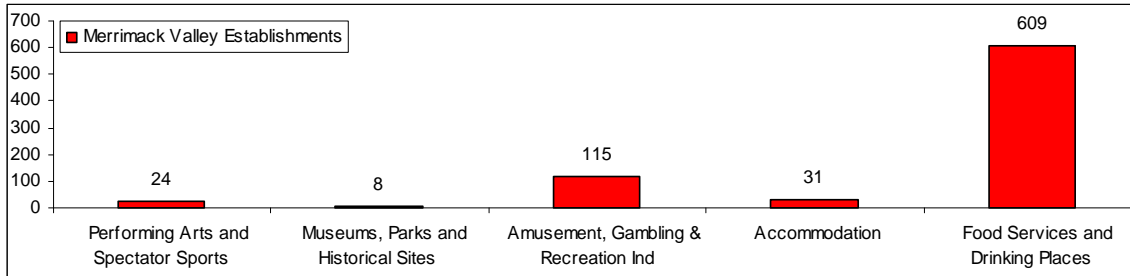


Merrimack Valley Establishments 4th Quarter 2006

In the 4th Quarter of 2006, there were 787 establishments in the Merrimack Valley Tourism, Lodging, and Food Services sector. Figure 5 shows Merrimack Valley establishments by Tourism, Lodging, and Food Services industrial sub sector. The Merrimack Valley accounted for about 30% of the 2,610 establishments in Tourism, Lodging, and Food Services sector in Northeast Region. The two Tourism, Lodging, and Food Services sub sectors with the largest number of establishments are Food Services and Drinking Places (609 establishments) and Amusement, Gambling, and Recreation (115 establishments). These two sub sectors account for about 92% of all Tourism, Lodging, and Food Services establishments in Merrimack Valley. The two sub sectors

with the smallest number of establishments in Merrimack Valley are Museums, Parks, and Historical Sites (8 establishments) and Performing Arts and Spectator Sports (24 establishments).

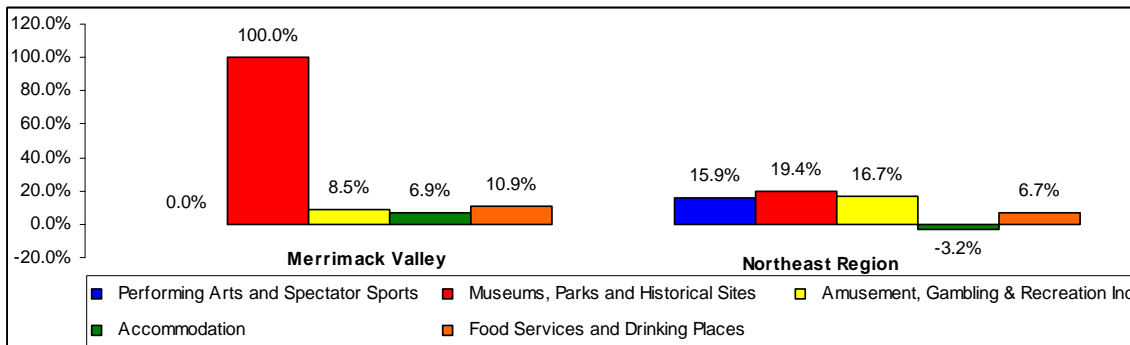
Figure 5



Merrimack Valley Establishment Growth 2001 to the 4th Quarter 2006

Figure 6 shows establishment growth from 2001 to the 4th quarter 2006 for Merrimack Valley and the Northeast Region in the Tourism, Lodging, and Food Services sub sectors. Establishment in the Merrimack Valley increased 10.5% adding 75 establishments, while the Northeast increased 8% adding 193 establishments. The sub sectors on the Merrimack Valley with establishment increases are Museums, Parks, and Historical Sites (100% increase), Food Services and Drinking Places (10.9% increase), Amusement, Gambling, and Recreation (8.5% increase), and Accommodation (6.9% increase). The only sub sector not have any establishment growth is Performing Arts and Spectator Sports which grew 0%.

Figure 6

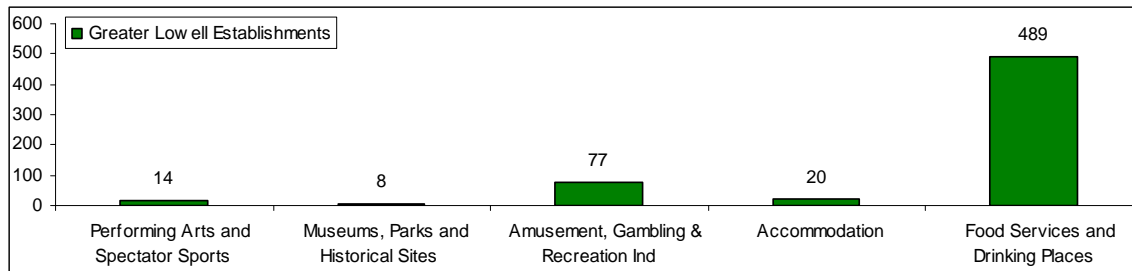


Greater Lowell Establishments 4th Quarter 2006

In the 4th Quarter of 2006, there were 608 establishments in the Greater Lowell Tourism, Lodging, and Food Services sector. Figure 7 shows Greater Lowell establishments by Tourism, Lodging, and Food Services industrial sub sector. The Greater Lowell accounted for about 23.3% of the 2,610 establishments in Tourism, Lodging, and Food Services sector in Northeast Region. The two Tourism, Lodging, and Food Services sub sectors with the largest number of establishments are Food Services and Drinking Places (489 establishments) and Amusement, Gambling, and Recreation (77 establishments).

These two sub sectors account for about 93% of all Tourism, Lodging, and Food Services establishments in Greater Lowell. The two sub sectors with the smallest number of establishments in Greater Lowell are Performing Arts and Spectator Sports (14 establishments) and Museums, Parks, and Historical Sites (8 establishments).

Figure 7



Greater Lowell Establishments Growth 2001 to the 4th Quarter 2006

Figure 8 shows establishment growth from 2001 to the 4th quarter 2006 for Greater Lowell and the Northeast Region in the Tourism, Lodging, and Food Services sub sectors. Establishment in the Greater Lowell increased 10.5% adding 75 establishments, while the Northeast increased 8% adding 193 establishments. The sub sectors on the Greater Lowell with establishment increases are Performing Arts and Spectator Sports (27.3% increase), Amusement, Gambling, and Recreation (20.3% increase), Museums, Parks, and Historical Sites (14.3% increase), and Food Services and Drinking Places (7.2% increase). The only sub sector not have any establishment growth is Accommodation which grew 0%.

Figure 8

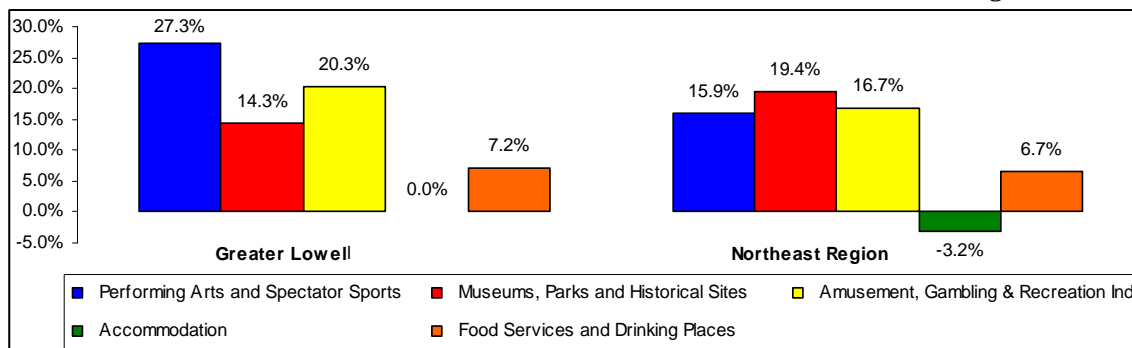


Table 3

Employment December 2006 ¹¹	North Shore	Merrimack Valley	Greater Lowell	Northeast Total
Total, all industries	170,135	130,666	115,360	416,161
Leisure and Hospitality	17,358	10,657	9,602	37,617
Arts, Entertainment, and Recreation	2,930	1,775	1,354	6,059
<i>Performing Arts and Spectator Sports</i>	330	58	74	462
<i>Museums, Parks and Historical Sites</i>	452	43	183	678

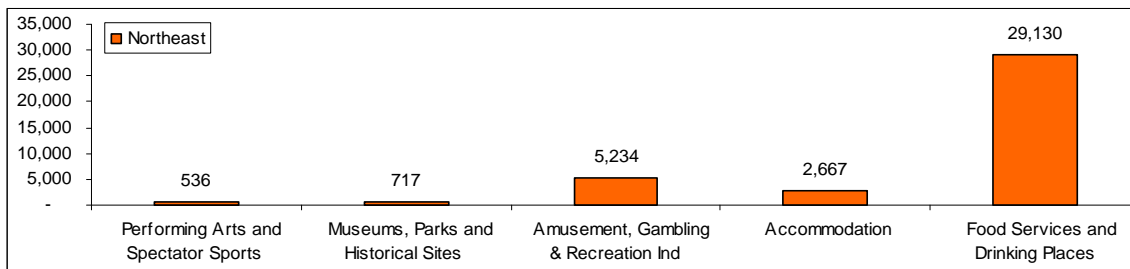
¹¹ Massachusetts Division of Career Services, ES-202 program, www.detma.org

<i>Amusement, Gambling & Recreation</i>	2,148	1,674	1,097	4,919
Accommodation and Food Services	14,428	8,882	8,248	31,558
<i>Accommodation</i>	1,195	519	846	2,560
<i>Food Services and Drinking Places</i>	13,233	8,363	7,402	28,998

Northeast Employment 4th Quarter 2006

In the 4th Quarter 2006, the average monthly employment in the Northeast Region’s Tourism, Lodging, and Food Services Industry was 38,284. The Northeast accounts for 12.8% of the 298,037 individuals employed in Massachusetts’ Tourism, Lodging, and Food Services Industry. The two largest Tourism, Lodging, and Food Services Industry sub sectors in the Northeast are Food Services and Drinking Places (29,130 employed) and Amusement, Gambling, and Recreation (5,234 employed). These two industries accounted for 90% of the total employment in the Tourism, Lodging, and Food Services Industry. The three smallest sub sectors are Accommodation (2,667 employed), Museums, Parks and Historical Sites (717 employed) and Performing Arts and Spectator Sports (536).

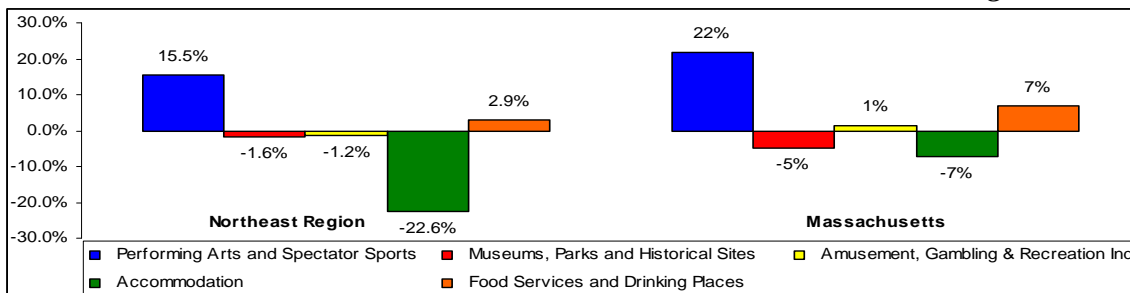
Figure 9



Northeast Employment Growth 2001 to 4th Quarter 2006

Figure 10 shows employment growth from 2001 to the 4th quarter 2006 for the Northeast Region and Massachusetts in the Tourism, Lodging, and Food Services Industry sub sectors. Employment in the Northeast increased 0.1% adding 41 jobs, while Massachusetts employment increased 4.7% adding 13,337 jobs. The sub sectors in the Northeast with employment increases are Performing Arts and Spectator Sports (15.5% increase) and Food Services and Drinking Places (2.9% increase). The sub sectors in the Northeast that had employment decreases are Accommodation (22.6% decrease), Museums, Parks, and Historical Sites (1.6% decrease), and Amusement, Gambling, and Recreation (1.2% decrease).

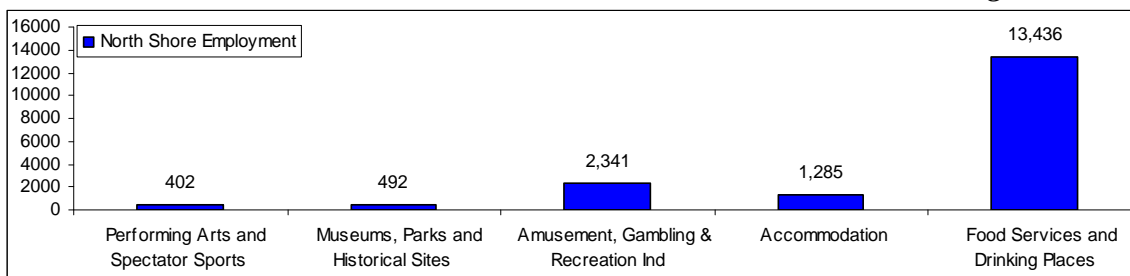
Figure 10



North Shore Employment 4th Quarter 2006

In the 4th Quarter 2006, the average monthly employment on the North Shore in the Tourism, Lodging, and Food Services Industry was 17,955. The North Shore accounts for 46.9% of the 38,284 individuals employed in Northeast Tourism, Lodging, and Food Services Industry. The two largest Tourism, Lodging, and Food Services sub sectors on the North Shore are Food Services and Drinking Places (13,436 employed) and Amusement, Gambling, and Recreation (2,341 employed). These two industries accounted for 87.8% of the total employment in the Tourism, Lodging, and Food Services Industry. The three smallest sub sectors are Accommodation (1,285 employed), Museums, Parks and Historical Sites (492 employed) and Performing Arts and Spectator Sports (402).

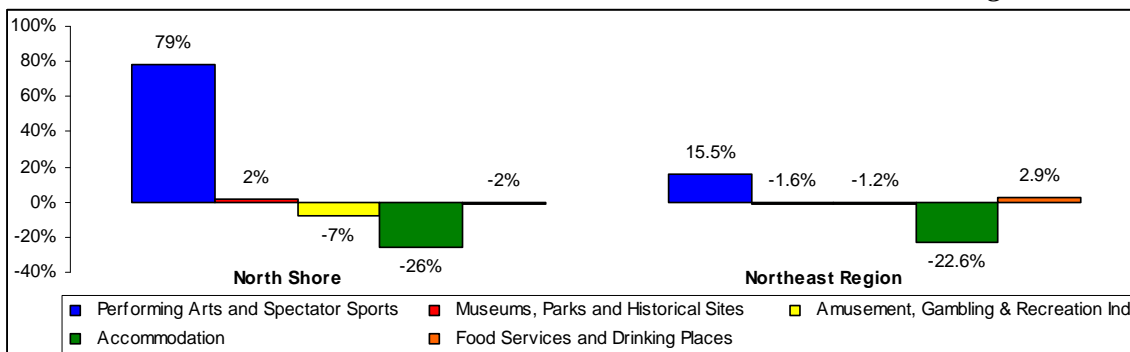
Figure 11



North Shore Employment Growth 2001 to 4th Quarter 2006

Figure 12 shows employment growth from 2001 to the 4th quarter 2006 on the North Shore and in the Northeast Region in Tourism, Lodging, and Food Services sub sectors. Employment on the North Shore decreased 3.6% losing 669 jobs, while the Northeast Region's employment increased 0.1% adding 41 jobs. The sub sectors on the North Shore with employment increases are Performing Arts and Spectator Sports (79% increase) Museums, Parks, and Historical Sites (2% increase). The sub sectors on the North Shore that had employment decreases are Accommodation (26% decrease), Amusement, Gambling, and Recreation (7% decrease) and Food Services and Drinking Places (2% decrease).

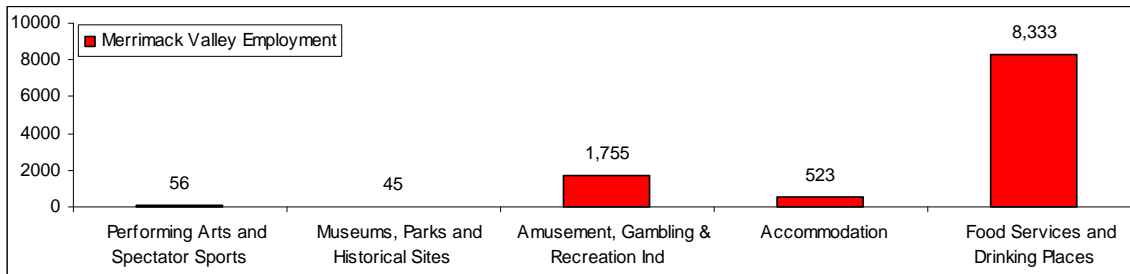
Figure 12



Merrimack Valley Employment 4th Quarter 2006

In the 4th Quarter 2006, the average monthly employment in Merrimack Valley in the Leisure & Hospitality Industry was 10,712. The Merrimack Valley accounts for 28% of the 38,284 individuals employed in Northeast Leisure & Hospitality Industry. The two largest Leisure & Hospitality sub sectors in Merrimack Valley are Food Services and Drinking Places (8,333 employed) and Amusement, Gambling, and Recreation (1,755 employed). These two industries accounted for 94.1% of the total employment in the Tourism, Lodging, and Food Services Industry. The three smallest sub sectors are Accommodation (523 employed), Museums, Parks and Historical Sites (45 employed) and Performing Arts and Spectator Sports (56 employed).

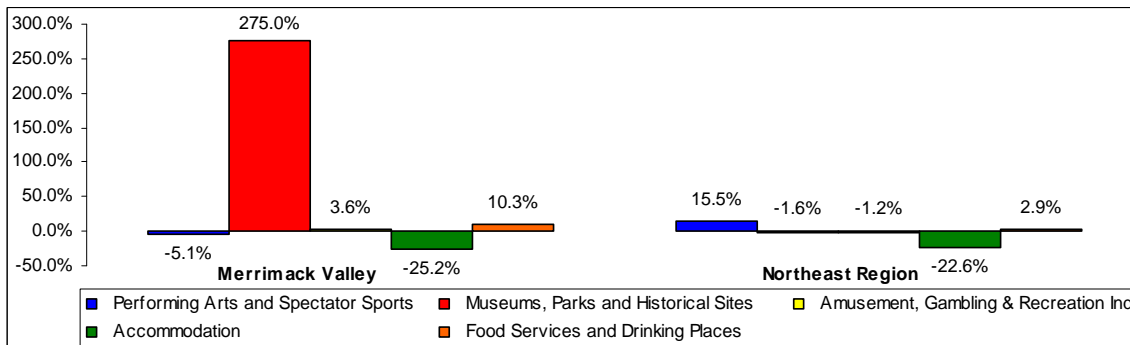
Figure 13



Merrimack Valley Employment Growth 2001 to 4th Quarter 2006

Figure 14 shows employment growth from 2001 to the 4th quarter 2006 in Merrimack Valley and in the Northeast Region in the Tourism, Lodging, and Food Services sub sectors. Employment in Merrimack Valley increased 6.9% adding 695 jobs, while the Northeast Region's employment increased 0.1% adding 41 jobs. The sub sectors in Merrimack Valley with employment increases are Museums, Parks, and Historical Sites (275% increase) Food Services and Drinking Places (10.3% increase) and Amusement, Gambling, and Recreation (3.6% increase). The sub sectors in Merrimack Valley that had employment decreases are Accommodation (25.2% decrease) and Performing Arts and Spectator Sports (5.1% decrease).

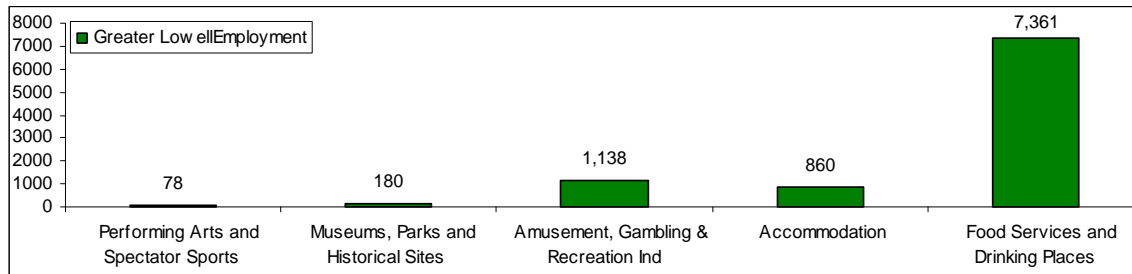
Figure 14



Greater Lowell Employment 4th Quarter 2006

In the 4th Quarter 2006, the average monthly employment in Greater Lowell in the Leisure & Hospitality Industry was 9,616. The Greater Lowell accounts for 25.1% of the 38,284 individuals employed in Northeast Leisure & Hospitality Industry. The two largest Leisure & Hospitality sub sectors in Greater Lowell are Food Services and Drinking Places (7,361 employed) and Amusement, Gambling, and Recreation (1,138 employed). These two industries accounted for 88.3% of the total employment in the Tourism, Lodging, and Food Services Industry. The three smallest sub sectors are Accommodation (860 employed), Museums, Parks and Historical Sites (180 employed) and Performing Arts and Spectator Sports (78 employed).

Figure 15



Greater Lowell Employment Growth 2001 to 4th Quarter 2006

Figure 16 shows employment growth from 2001 to the 4th quarter 2006 in Greater Lowell and in the Northeast Region in the Tourism, Lodging, and Food Services sub sectors. Employment in Greater Lowell increased 0.2% adding 15 jobs, while the Northeast Region's employment increased 0.1% adding 41 jobs. The sub sectors in Greater Lowell with employment increases are Amusement, Gambling, and Recreation (6.1% increase) and Food Services and Drinking Places (3.6% increase). The sub sectors in Greater Lowell that had employment decreases are Performing Arts and Spectator Sports (56.7% decrease), Museums, Parks, and Historical Sites (22.7% decrease), and Accommodation (15.1% decrease). The sub sectors in the Northeast Region that had employment increases are Performing Arts and Spectator Sports (15.5% increase) and Food Services and Drinking Places (2.9% increase). The sub sectors in the Northeast Region that had employment decreases are Museums, Parks, and Historical Sites (-1.6% decrease), Amusement, Gambling, and Recreation Ind (-1.2% decrease), and Accommodation (-22.6% decrease).

Figure 16

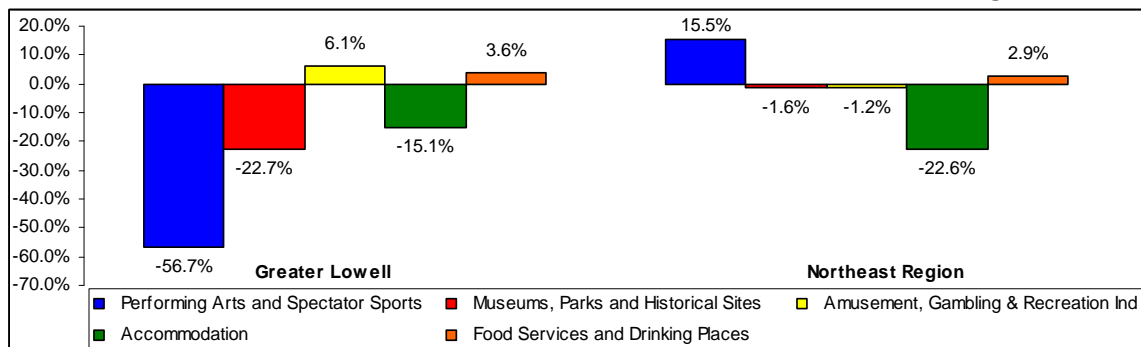


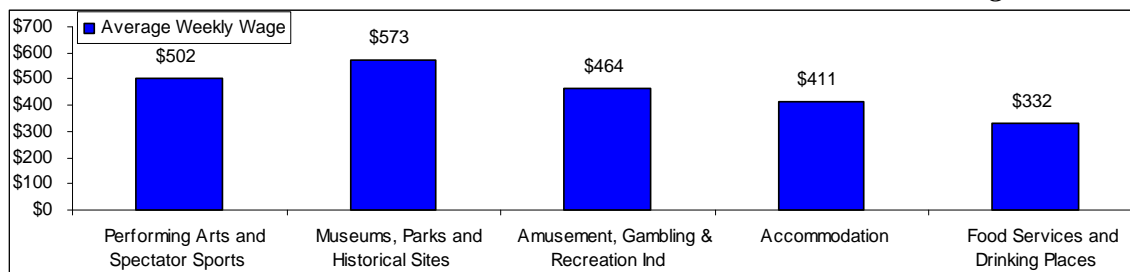
Table 4

Average Weekly Wage 4th Q 2006 ¹²	North Shore	Merrimack Valley	Greater Lowell
Total, all industries	\$895	\$943	\$1,103
Leisure and Hospitality	\$365	\$338	\$322
Arts, Entertainment, and Recreation	\$485	\$370	\$487
<i>Performing Arts and Spectator Sports</i>	\$502	\$562	\$1,386
<i>Museums, Parks and Historical Sites</i>	\$573	\$446	\$856
<i>Amusement, Gambling & Recreation</i>	\$464	\$362	\$367
Accommodation and Food Services	\$338	\$331	\$293
<i>Accommodation</i>	\$411	\$510	\$422
<i>Food Services and Drinking Places</i>	\$332	\$320	\$278

Average Weekly Wage in the North Shore 2006

The average weekly wage on the North Shore is \$895; this is \$530 or about 245% more than the Tourism, Lodging, and Food Services average weekly wage of \$365. The two top paying Tourism, Lodging, and Food Services sub sectors on the North Shore are Museums, Parks, and Historical Sites (\$573) and Performing Arts and Spectators Sports (\$502). The two Tourism, Lodging, and Food Services sub sectors on the North Shore with the lowest average weekly wage are Accommodation (\$411) and Food Services and Drinking Places (\$332).

Figure 1 7

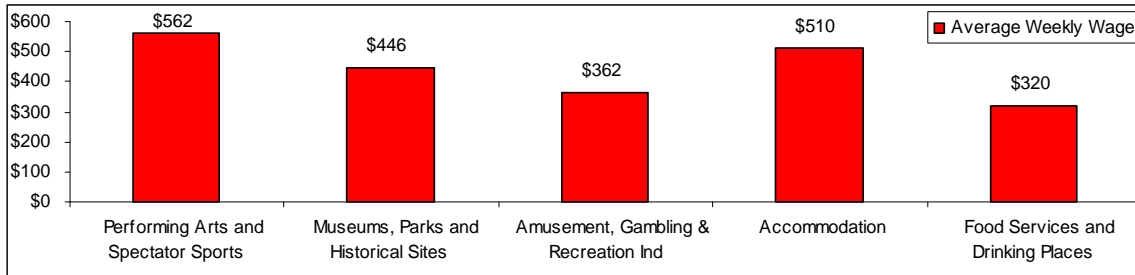


Average Weekly Wage in the Merrimack Valley 2006

The average weekly wage in Merrimack Valley is \$943; this is \$605 or about 278% more than the Tourism, Lodging, and Food Services average weekly wage of \$338. The two top paying Tourism, Lodging, and Food Services sub sectors in Merrimack Valley are Performing Arts and Spectators Sports (\$562) and Accommodation (\$510). The two Tourism, Lodging, and Food Services sub sectors in Merrimack Valley with the lowest average weekly wage are Amusement, Gambling, and Recreation (\$362) and Food Services and Drinking Places (\$320).

¹² Massachusetts Division of Career Services, ES-202 program, www.detma.org

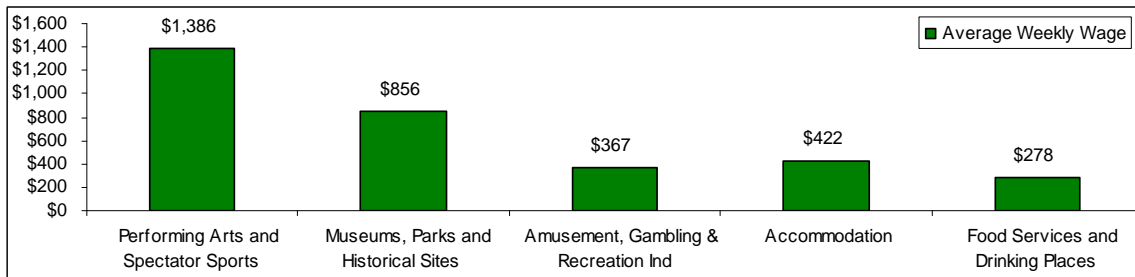
Figure 18



Average Weekly Wage in the Greater Lowell 2006

The average weekly wage in Greater Lowell is \$1,103; this is \$781 or about 342% more than the Tourism, Lodging, and Food Services average weekly wage of \$322. The two top paying Tourism, Lodging, and Food Services sub sectors in Greater Lowell are Performing Arts and Spectators Sports (\$1,386) and Museums, parks, and Historical Sites (\$856). The two Tourism, Lodging, and Food Services sub sectors in Greater Lowell with the lowest average weekly wage are Amusement, Gambling, and Recreation (\$367) and Food Services and Drinking Places (\$278).

Figure 19



SUMMARY OF RESULTS OF LMI DATA:

- The hospitality industry in the Northeast is substantial in terms of number of employees, representing 13% of the labor force, primarily in the food service industry;
- The industry is very stable with little overall growth, although an overall growth in the number of establishments, indicating the increase in small businesses within the industry;
- Although there are only 118 lodging establishments in the Northeast region, these are primarily larger employers from the perspective of number of employees per establishment;
- Close to 50% of all employment within this industry is on the North Shore; and
- Wages are very low overall in this industry, although the reliance on tipping and contract labor as an income strategy cannot be tracked.

GENERAL DISCUSSION:

- Difficulties with survey and interviewing, along with the small business nature of companies, indicate that this is a very fragmented industry that perhaps could benefit from a concerted effort to advance the concept of collaboration among various industry members;
- Basic skill training would appear to be needed by companies, given their reliance on low skilled/low educated labor;
- Lodging industry overlaps with food service in that most lodging companies also have food service within their establishment, making for more dynamic career ladder possibilities;
- Training programs with smaller companies presents challenges in terms of staff coverage and potential lost wages for employees;
- Employee retention seems to be a major concern within these industries, especially the food service industry; and
- Pre-established industry networks (associations etc.) should be utilized to bring together employers with common human resource needs, goals and objectives.

References

Massachusetts Division of Career Services, Employment and Wage Survey Program (ES-202), 4th Quarter 2006, http://lmi2.detma.org/Lmi/lmi_es_a.asp

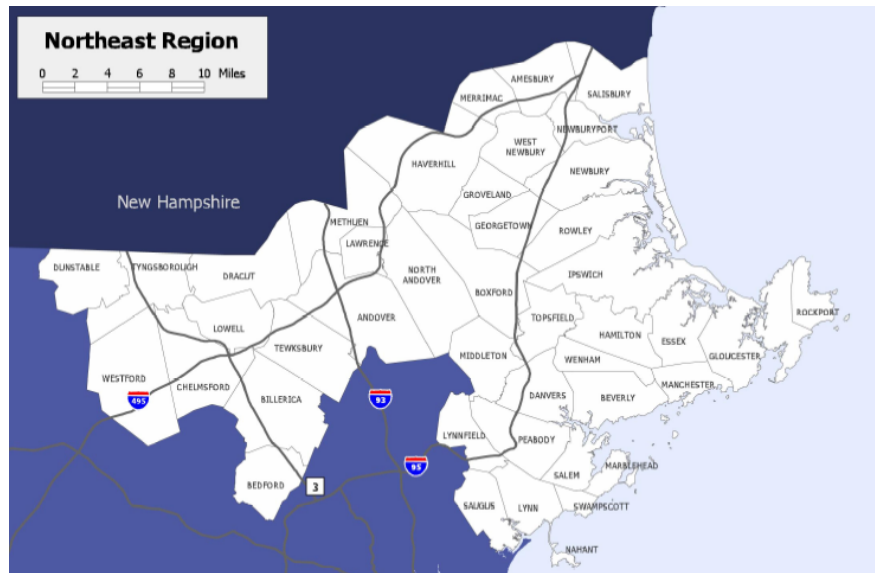
Kaznocha, Ed. NAICS Desk Aid, Massachusetts Division of Career Services, 2002

Massachusetts Division of Career Services, Massachusetts Job Vacancy Survey 4th Quarter 2006, <http://lmi2.detma.org/Lmi/LMIjobvacancy.asp>

Appendix - Survey Instruments

Northeast Massachusetts Lodging Survey done on behalf of the Northeast Partnership for Hospitality and Tourism

This survey is being conducted by the North Shore Workforce Investment Board (NSWIB) on the behalf of the Northeast Partnership for Hospitality and Tourism (including: North Shore Community College, Middlesex Community College, and Northern Essex Community College, as well as community and industry leaders). The purpose of this survey is to understand the current state of the lodging (hospitality) labor market within the tourism industry, in our region and to develop training programs that meet your needs as



employers. Participation in this survey is completely voluntary and all information will be kept confidential. Thank you for your time and participation.

14. About how many people are employed in your company today? (Northeast employment only please) _____
 - a. About how many are part-time? _____
 - b. About how many are seasonal? _____

15. Approximately what percentages of all positions at your company are open to candidates with different education levels, from less than a high school degree on up to graduate degrees? Please list what percent of all positions are open to people with these educational levels:
 - A. Less than high school degree or GED _____
 - B. High school degree or GED only _____
 - C. Associates (2 year) degree _____

D. Bachelors (4 year) degree _____

E. Masters degree or higher _____

16. Could you please list the number of openings, and the number of openings filled for each position you have had in the past year? This is for jobs that are generally considered entry level. (skip if there were no new openings)

Bellhop & Baggage Handlers:

Number of openings:

Number filled:

Starting wage:

Security Guards:

Number of openings:

Number filled:

Starting wage:

Building & Grounds Cleaning & Maintenance Workers:

Number of openings:

Number filled:

Starting wage:

Janitors & Cleaners:

Number of openings:

Number filled:

Starting wage:

Engineers (i.e. maintenance)

Number of openings:

Number filled:

Starting wage:

Maids and House Keeping :

Number of openings:

Number filled:

Starting wage:

Front Desk Clerks (Reception):

Number of openings:

Number filled:

Starting wage:

Concierges/Guest Services:

Number of openings:

Number filled:

Starting wage:

Office and Administrative Support:

Number of openings:

Number filled:

Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:

Number filled:

Starting wage:

Occupation 2:

Number of openings:

Number filled:

Starting wage:

Occupation 3:

Number of openings:

Number filled:

Starting wage:

17. What were the reasons for openings in Question 3? Please estimate how many of the openings you listed above were due to these reasons: (skip if there were no new openings)

A. New business needs:

B. Replacement of employees who retired:

C. Replacement of employees who left for other positions:

D. Replacement of employees who obtained an internal promotion:

E. Other (Please describe):

18. What are the advancement opportunities for workers with less than an Associates degree at your company?

19. Could you please list the number of openings, and the number of openings filled, for each position you have had in the past year? This is for jobs that generally require a degree or extensive work experience. (skip if there were no new openings)

General Managers:

Number of openings:

Number filled:

Starting wage:

Sales Manager:

Number of openings:

Number filled:

Starting wage:

Advertising Manager:

Number of openings:

Number filled:

Starting wage:

Assistant Manager:

Number of openings:

Number filled:

Starting wage:

Accountants:

Number of openings:

Number filled:

Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:

Number filled:

Starting wage:

Occupation 2:

Number of openings:

Number filled:

Starting wage:

Occupation 3:

Number of openings:

Number filled:

Starting wage:

20. What were the reasons for openings in Question 6? Please estimate how many of the openings you listed above were due to each set of reasons: (skip if there were no openings)

- A. New business needs:
- B. Replacement of employees who retired:
- C. Replacement of employees who left for other positions:
- D. Replacement of employees who obtained an internal promotion:
- E. Other (Please describe):

21. How, generally, do you fill these positions?

Entry Level Positions	Associate Degree or Higher Positions
Newspaper advertisements <input type="checkbox"/>	Newspaper advertisements <input type="checkbox"/>
Word of Mouth <input type="checkbox"/>	Word of Mouth <input type="checkbox"/>
On-line advertising <input type="checkbox"/>	On-line advertising <input type="checkbox"/>
Career Center Advertising <input type="checkbox"/>	Career Center Advertising <input type="checkbox"/>
Referral from Training Program/College Program <input type="checkbox"/>	Referral from Training Program/College Program <input type="checkbox"/>
Employee Referral <input type="checkbox"/>	Employee Referral <input type="checkbox"/>
Other, please specify:	Other, please specify:

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22. What are the advancement opportunities for workers with Associates degree or higher at your company?

23. What difficulties, if any, do you have finding and retaining workers with particular skills or qualifications? (Check all that apply)

- A. Lack of English language skills
- B. Lack of a high school diploma
- C. Lack of an Associates degree
- D. Lack of a Bachelors degree
- E. Lack of industry certification
- F. Lack of related work experience
- G. Lack of applicants altogether
- H. Other, please specify:

24. What are the most critical human resource issue facing the hospitality industry and why? (e.g. recruitment, retention, transportation, childcare, or flex scheduling for your employees etc.?)

25. Does your company offer training for your employees? (either with paid release time or non-paid release time for training?)

Yes No If Yes, what type:

26. Does your company offer tuition reimbursement?

Yes No If Yes, what type:

Thank you for taking the time to answer our survey.

Name: _____ Title: _____

Company: _____

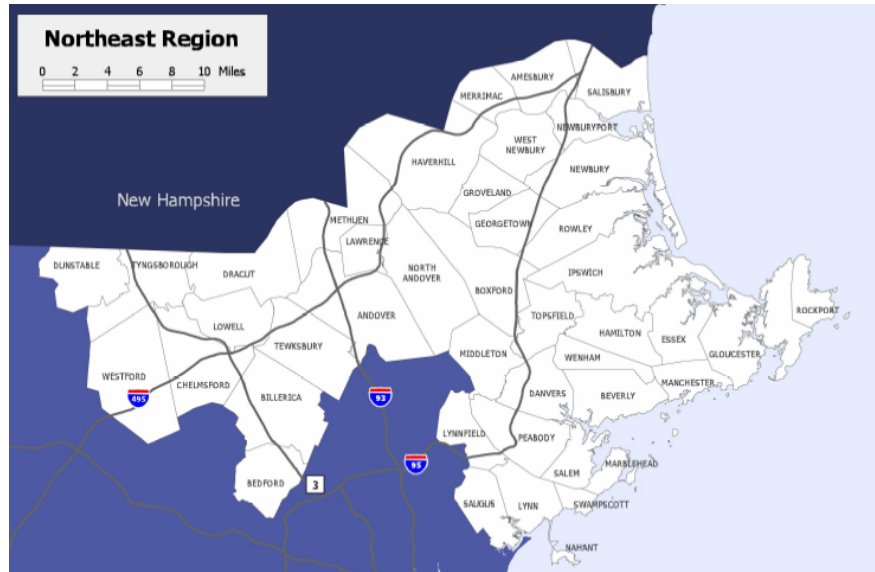
Address: _____

Phone: _____ Email: _____

Lastly, would you like to receive the results of this survey? Yes No

Northeast Massachusetts Food Service Survey done on behalf of the Northeast Partnership for Hospitality and Tourism

This survey is being conducted by the North Shore Workforce Investment Board (NSWIB) on the behalf of the Northeast Partnership for Hospitality and Tourism (including: North Shore Community College, Middlesex Community College, and Northern Essex Community College, as well as community and industry leaders). The purpose of this survey is to understand the current state of the food service labor market within the tourism industry, in our region and to develop training programs that meet your needs as



employers. Participation in this survey is completely voluntary and all information will be kept confidential. Thank you for your time and participation.

27. About how many people are employed in your company today? (Northeast employment only please) _____
 - a. About how many are part-time? _____
 - b. About how many are seasonal? _____

28. Approximately what percentages of all positions at your company are open to candidates with different education levels, from less than a high school degree on up to graduate degrees? Please list what percent of all positions are open to people with these educational levels:
 - A. Less than high school degree or GED _____
 - B. High school degree or GED only _____
 - C. Associates (2 year) degree _____
 - D. Bachelors (4 year) degree _____

E. Masters degree or higher _____

29. Could you please list the number of openings, and the number of openings filled for each position you have had in the past year? This is for jobs that are generally considered entry level. (skip if there were no new openings)

Waiters & Waitresses:

Number of openings:
Number filled:
Starting wage:

Bartenders:

Number of openings:
Number filled:
Starting wage:

Busboys:

Number of openings:
Number filled:
Starting wage:

Hosts & Hostesses:

Number of openings:
Number filled:
Starting wage:

Food Preparation Workers:

Number of openings:
Number filled:
Starting wage:

Line Cooks:

Number of openings:
Number filled:
Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:
Number filled:
Starting wage:

Occupation 2:

Number of openings:
Number filled:
Starting wage:

Occupation 3:

Number of openings:
Number filled:
Starting wage:

30. What were the reasons for openings in Question 3? Please estimate how many of the openings you listed above were due to these reasons: (skip if there were no new openings)

- A. New business needs:
- B. Replacement of employees who retired:
- C. Replacement of employees who left for other positions:
- D. Replacement of employees who obtained an internal promotion:
- E. Other (Please describe):

31. What are the advancement opportunities for workers with less than an Associates degree at your company?

32. Could you please list the number of openings, and the number of openings filled, for each position you have had in the past year? This is for jobs that generally require a degree or extensive work experience. (skip if there were no new openings)

General Managers:

Number of openings:

Number filled:

Starting wage:

Head Chef:

Number of openings:

Number filled:

Starting wage:

Sous Chef:

Number of openings:

Number filled:

Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:

Number filled:

Starting wage:

Occupation 2:

Number of openings:

Number filled:

Starting wage:

Occupation 3:

Number of openings:

Number filled:

Starting wage:

33. What were the reasons for openings in Question 6? Please estimate how many of the openings you listed above were due to each set of reasons: (skip if there were no openings)

- A. New business needs:
- B. Replacement of employees who retired:
- C. Replacement of employees who left for other positions:
- D. Replacement of employees who obtained an internal promotion:
- E. Other (Please describe):

34. How, generally, do you fill these positions?

Less than Associate Degree Positions	Associate Degree or Higher
Newspaper advertisements <input type="checkbox"/>	Newspaper advertisements <input type="checkbox"/>
Word of Mouth <input type="checkbox"/>	Word of Mouth <input type="checkbox"/>
On-line advertising <input type="checkbox"/>	On-line advertising <input type="checkbox"/>
Career Center Advertising <input type="checkbox"/>	Career Center Advertising <input type="checkbox"/>
Referral from Training Program/College Program <input type="checkbox"/>	Referral from Training Program/College Program <input type="checkbox"/>
Employee Referral <input type="checkbox"/>	Employee Referral <input type="checkbox"/>
Other, please specify:	Other, please specify:

35. What are the advancement opportunities for workers with Associates degree or higher at your company?

36. What difficulties, if any, do you have finding and retaining workers with particular skills or qualifications? (Check all that apply)

- A. Lack of English language skills
- B. Lack of a high school diploma
- C. Lack of an Associates degree
- D. Lack of a Bachelors degree
- E. Lack of industry certification
- F. Lack of related work experience
- G. Lack of applicants altogether
- H. Other, please specify:

37. What are the most critical human resource issue facing the hospitality industry and why? (e.g. recruitment, retention, transportation, childcare, or flex scheduling for your employees etc.?)

38. Does your company offer training for your employees?

Yes No If Yes, what type:

39. Does your company offer tuition reimbursement?

Yes No If Yes, what type:

Thank you for taking the time to answer our survey.

Name: _____ Title: _____

Company: _____

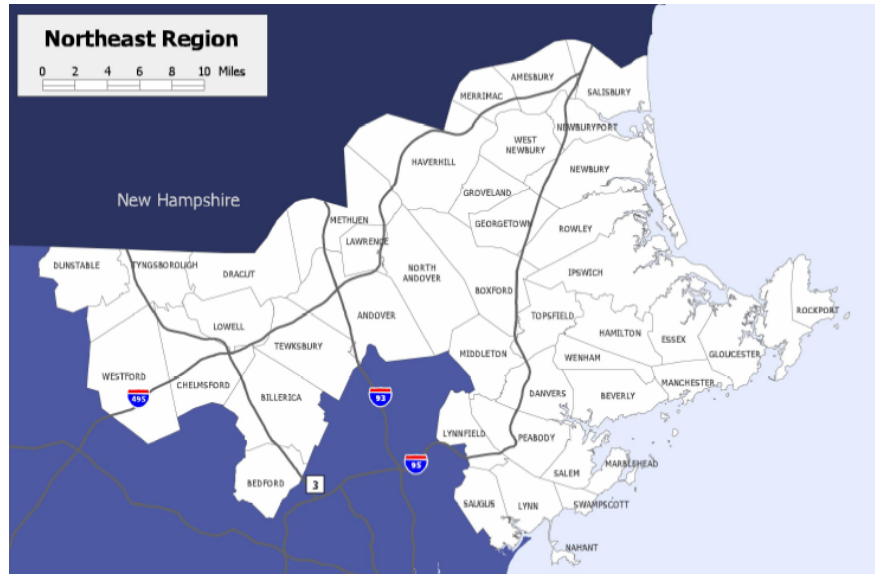
Address: _____

Phone: _____ Email: _____

Lastly, would you like to receive the results of this survey? Yes No

Northeast Massachusetts Tourism Survey
 done on behalf of the
Northeast Partnership for Hospitality and Tourism

This survey is being conducted by the North Shore Workforce Investment Board (NSWIB) on the behalf of the Northeast Partnership for Hospitality and Tourism (including: North Shore Community College, Middlesex Community College, and Northern Essex Community College, as well as community and industry leaders). The purpose of this survey is to understand the current state of the labor market within the tourism industry, in our region and to develop training programs that meet your needs as employers.



Participation in this survey is completely voluntary and all information will be kept confidential. Thank you for your time and participation.

40. About how many people are employed in your company today? (Northeast employment only please) _____
- a. About how many are part-time? _____
 - b. About how many are seasonal? _____
41. Approximately what percentages of all positions at your company are open to candidates with different education levels, from less than a high school degree on up to graduate degrees? Please list what percent of all positions are open to people with these educational levels:
- A. Less than high school degree or GED _____
 - B. High school degree or GED only _____
 - C. Associates (2 year) degree _____
 - D. Bachelors (4 year) degree _____
 - E. Masters degree or higher _____

42. Could you please list the number of openings, and the number of openings filled for each position you have had in the past year? This is for jobs that are generally considered entry level. (skip if there were no new openings)

Receptionist:

Number of openings:
Number filled:
Starting wage:

Tour Guides:

Number of openings:
Number filled:
Starting wage:

Tour Coordinators/Planners:

Number of openings:
Number filled:
Starting wage:

Reservationists:

Number of openings:
Number filled:
Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:
Number filled:
Starting wage:

Occupation 2:

Number of openings:
Number filled:
Starting wage:

Occupation 3:

Number of openings:
Number filled:
Starting wage:

43. What were the reasons for openings in Question 3? Please estimate how many of the openings you listed above were due to these reasons: (skip if there were no new openings)

- A. New business needs:
- B. Replacement of employees who retired:
- C. Replacement of employees who left for other positions:
- D. Replacement of employees who obtained an internal promotion:
- E. Other (Please describe):

44. What are the advancement opportunities for workers with less than an Associates degree at your company?
45. Could you please list the number of openings, and the number of openings filled, for each position you have had in the past year? This is for jobs requiring a degree or extensive work experience. (skip if there were no new openings)

Tour Managers:

Number of openings:
Number filled:
Starting wage:

Accountants:

Number of openings:
Number filled:
Starting wage:

Sales/Marketing:

Number of openings:
Number filled:
Starting wage:

Web Design/Electronic Media:

Number of openings:
Number filled:
Starting wage:

Curators:

Number of Openings:
Number filled:
Starting wage:

Please list additional occupations & openings:

Occupation 1:

Number of openings:
Number filled:
Starting wage:

Occupation 2:

Number of openings:
Number filled:
Starting wage:

Occupation 3:

Number of openings:
Number filled:
Starting wage:

46. What were the reasons for openings in Question 6? Please estimate how many of the openings you listed above were due to each set of reasons: (skip if there were no openings)

- A. New business needs:
- B. Replacement of employees who retired:
- C. Replacement of employees who left for other positions:
- D. Replacement of employees who obtained an internal promotion:
- E. Other (Please describe):

47. How, generally, do you fill these positions?

Entry Level Positions	Associate Degree or Higher Positions
Newspaper advertisements <input type="checkbox"/>	Newspaper advertisements <input type="checkbox"/>
Word of Mouth <input type="checkbox"/>	Word of Mouth <input type="checkbox"/>
On-line advertising <input type="checkbox"/>	On-line advertising <input type="checkbox"/>
Career Center Advertising <input type="checkbox"/>	Career Center Advertising <input type="checkbox"/>
Referral from Training Program/College Program <input type="checkbox"/>	Referral from Training Program/College Program <input type="checkbox"/>
Employee Referral <input type="checkbox"/>	Employee Referral <input type="checkbox"/>
Other, please specify:	Other, please specify:

48. What are the advancement opportunities for workers with Associates degree or higher at your company?

49. What difficulties, if any, do you have finding and retaining workers with particular skills or qualifications? (Check all that apply)

- A. Lack of English language skills
- B. Lack of a high school diploma
- C. Lack of an Associates degree
- D. Lack of a Bachelors degree
- E. Lack of industry certification
- F. Lack of related work experience
- G. Lack of applicants altogether
- H. Other, please specify:

50. What are the most critical human resource issue facing the hospitality industry and why? (e.g. recruitment, retention, transportation, childcare, or flex scheduling for your employees etc.?)

51. Does your company offer training for your employees?

Yes No If Yes, what type:

52. Does your company offer tuition reimbursement?

Yes No If Yes, what type:

Thank you for taking the time to answer our survey.

Name: _____ Title: _____

Company: _____

Address: _____

Phone: _____ Email: _____

Lastly, would you like to receive the results of this survey? Yes No

Supplemental Insert

Table 5 shows the Cities and Towns within the three Workforce Investment Areas (WIA) that make up the Northeast of Massachusetts. These three WIA's are the geographical areas used in the labor market analysis portion of the report and the primary geographic areas used in the survey portion of the report.

Table 5

WIA Region		
North Shore	Merrimack Valley	Greater Lowell
Beverly	Amesbury	Billerica
Danvers	Andover	Chelmsford
Essex	Boxborough	Dracut
Gloucester	Boxford	Dunstable
Ipswich	Georgetown	Lowell
Lynn	Groveland	Tewksbury
Lynnfield	Haverhill	Tyngsborough
Manchester	Lawrence	Westford
Marblehead	Merrimack	
Middleton	Methuen	
Nahant	Newbury	
Peabody	Newburyport	
Rockport	North Andover	
Salem	Rowley	
Saugus	Salisbury	
Swampscott	Salisbury Beach	
Topsfield	West Newbury	
Wenham		