



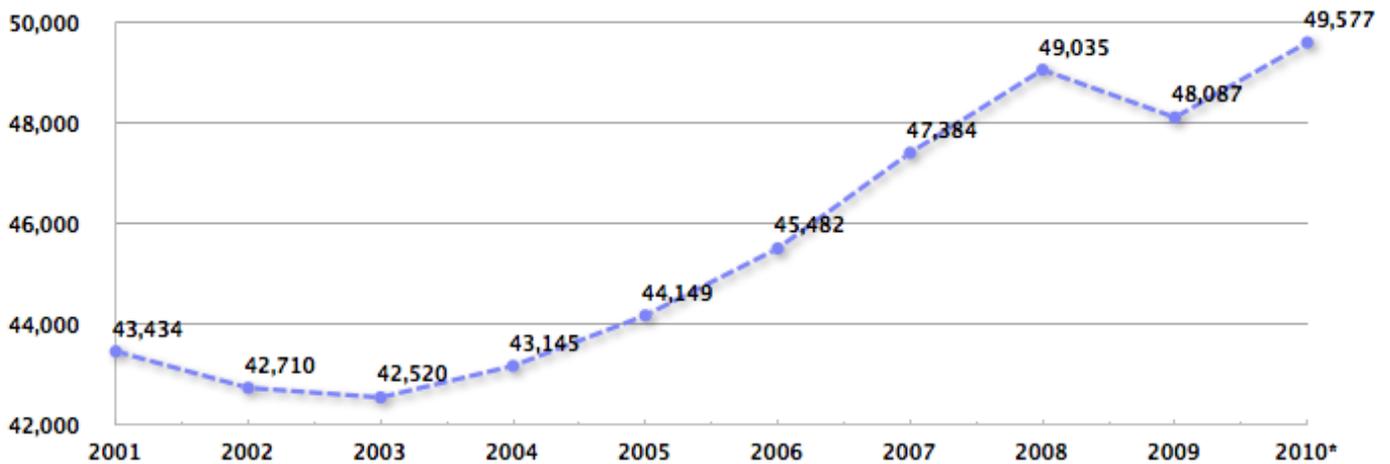
## Accommodation and Food Services Industry

Accommodation and food services are one of the larger industries in Boston, making up 7.5% of total employment in 2010. This ranks accommodation and food services 6th amongst the 20 major industrial sectors identified by the Bureau of Labor Statistics (BLS)<sup>1</sup>. The accommodation and food services industry includes traveler accommodations, full-service restaurants, limited service eating places, and drinking places (bars).

### Employment

Today, Boston's accommodation and food services industry employs nearly 50,000 people. Overall, the accommodation and food services industry employment has experienced healthy job growth over the last decade. After dipping by 1,000 jobs since 2001, the industry grew by 6,500 jobs from 2003 to 2008. Although the economic recession of 2008 caused a dip in employment in 2009, the industry recovered all of its jobs by 2010.

### Number of Accommodation and Food Service Jobs



Source: Massachusetts Department of Workforce Development, US Bureau of Economic Analysis, Boston Redevelopment Authority (BRA) Research Division Analysis.

\*2010 employment data is a preliminary estimate based on 2010 annual data from DWD and 2009 BEA data.

The largest occupations in the accommodation and food services industry in Boston include waiters and waitresses; combined food preparation and serving workers; restaurant cooks; and bartenders. Below is a list of the top ten accommodation and food services occupations in Boston by employment. These ten occupations make up approximately 76% of the accommodation and food services industry.

### Top Ten Accommodation and Food Services Occupations by Employment

<b><u>Job Title:</u></b>	<b><u>Total</u></b>
Waiters and Waitresses .....	9,592
Combined Food Preparation and Serving Workers, Including Fast Food .....	8,580
Cooks, Restaurant .....	3,225
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop .....	3,016
Bartenders .....	2,631
First-Line Supervisors/Managers of Food Preparation and Serving Workers .....	2,486
Dishwashers .....	2,452
Food Preparation Workers .....	1,958
Maids and Housekeeping Cleaners .....	1,701
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop .....	1,522

Source: Labor Market Assessment Tool 2.0, (BRA) Research Division Analysis.

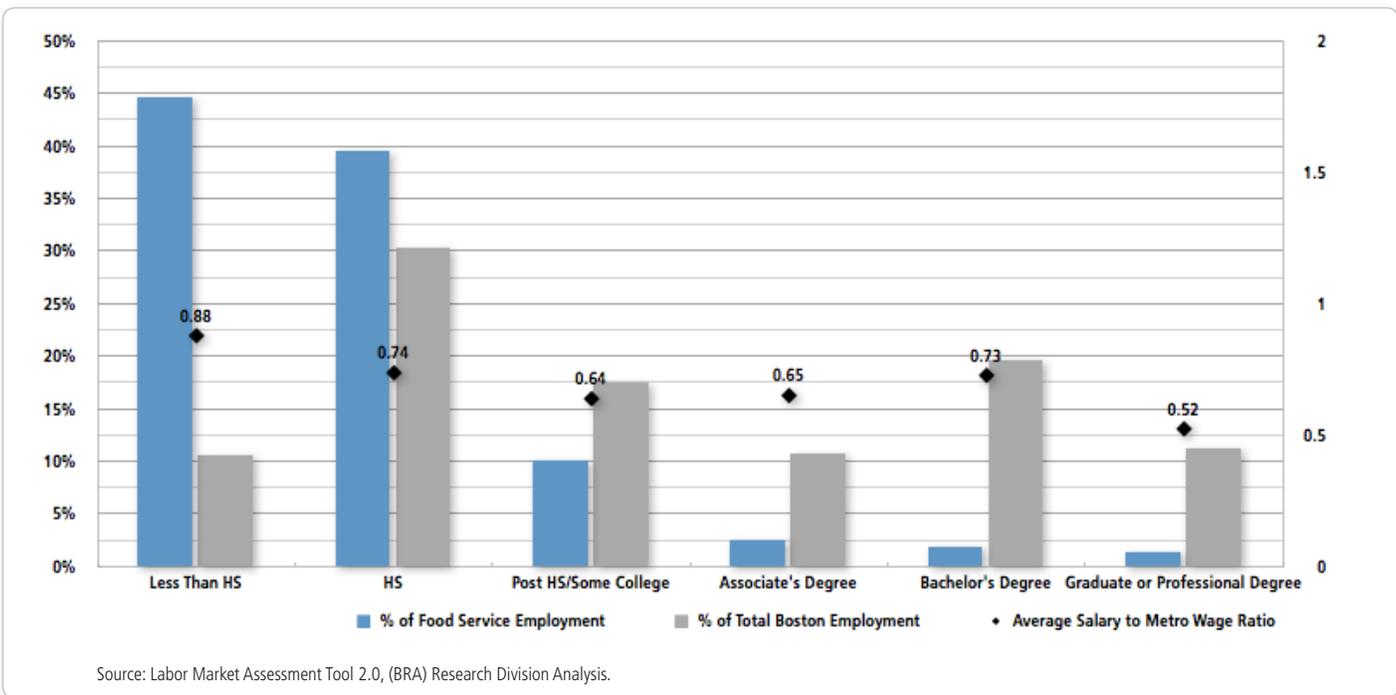
### Major Employers in Accommodation and Food Services

The city's largest employers in the accommodation and food services industry include the Westin and Marriott Copley Place Hotels, the Boston Park Plaza Hotel & Towers, the Four Seasons-Boston, the Sheraton-Boston, and the Omni Parker House. Accommodation and food services jobs are overwhelmingly concentrated in Boston's Downtown, Back Bay, and Fenway neighborhoods. The attached map depicts the accommodation and food services establishments by size in Boston.

### Education, Skill Requirements, and Wages

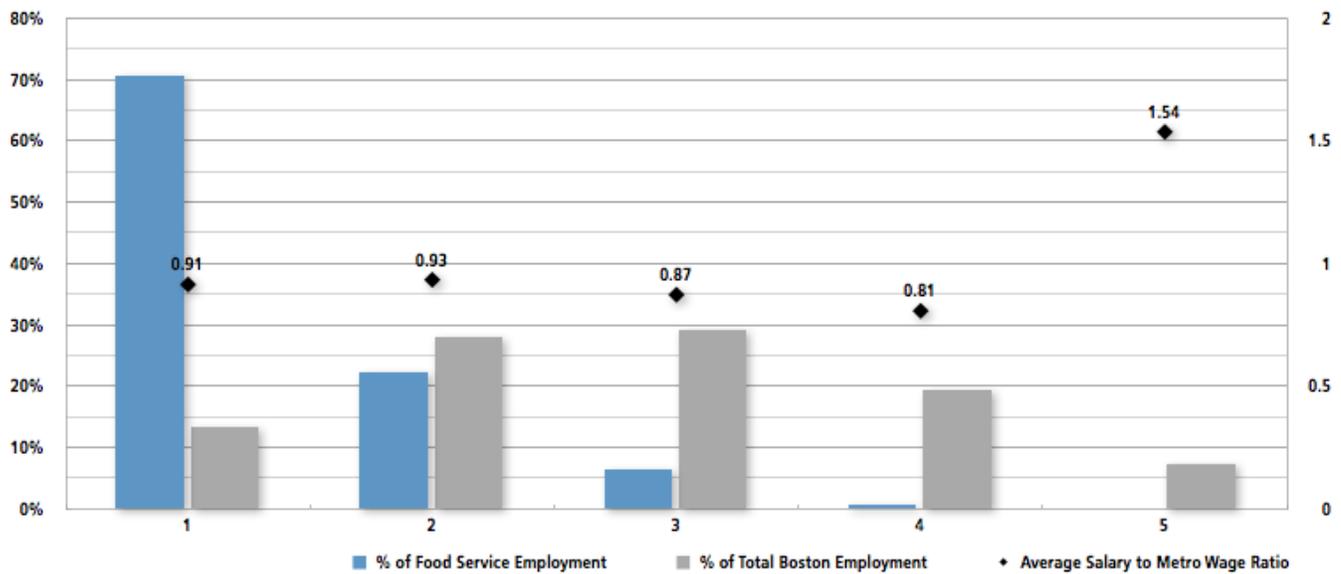
Overall the educational requirements for the accommodation and food services industry are modest. More than 95% of accommodation and food services jobs require some college or less. This is higher than Boston as a whole, where approximately 58% of jobs require some college or less. The Industry-to-Metro wage ratio shows how wages by educational requirement look different between an industry and the Metro Boston average for the same education level. In general, the average wages for jobs in accommodation and food services are lower than all jobs in the region by educational requirement.

### Education Requirements and Wages



The Boston Redevelopment Authority’s Labor Market Assessment Tool (LMAT)<sup>2</sup> also has different measures for job training, called job zones. The lower the job zone number, the less training, education, and previous work experience needed to perform the job. Overall, close to 98% of jobs in accommodation and food services are in job zones 1, 2, and 3. This indicates the industry overall requires modest skills. Most occupations in accommodation and food services require some preparation, such as a high school diploma and previous hospitality/food service related skills.

## Job Zones and Wages

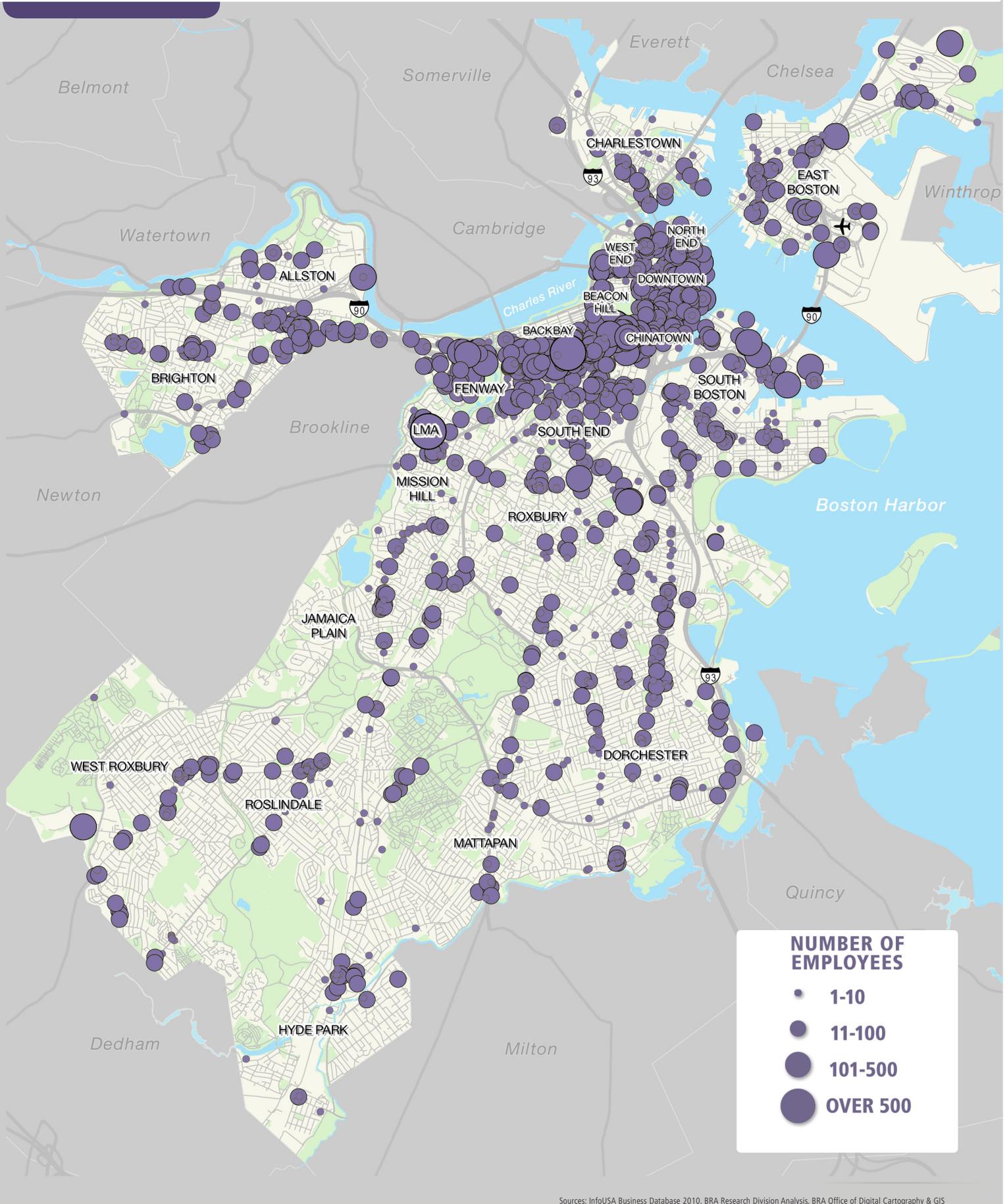


Source: Labor Market Assessment Tool 2.0, (BRA) Research Division Analysis.

## Sector Trends

A location quotient is used to assess the degree of regional specialization in an industry as compared to the national average. An LQ of "1" indicates an industry is concentrated in an area's economy in a proportion similar to the US overall. An LQ over "1" indicates an area of specialization for the region. With a location quotient of 1.06, the accommodation and food services industry accounts for a greater proportion of total jobs in Boston than at the national level.

In the coming years, employment in the accommodation and food services industry in Boston is expected to increase. Using New England Economic Partnership (NEEP) projections, we estimate the accommodation and food services industry to grow by approximately 9.4 %—or 4,622 jobs—by 2015<sup>3</sup>. This change would account for 10.3% of the city's total employment change during the 5 year period.



Sources: InfoUSA Business Database 2010, BRA Research Division Analysis, BRA Office of Digital Cartography & GIS

## City of Boston - Industry Profiles

<b>Rank Industry:</b>	<b># OF EMPLOYEES</b>	<b>CHANGE IN JOBS 2001-2010</b>	<b>% OF TOTAL EMPLOYMENT</b>	<b>LOCATION QUOTIENT</b>	<b>AVERAGE WAGES</b>	<b>JOBS ADDED BY 2015</b>
1. Health Care and Social Assistance Industry	122,532	26,390	18.5%	1.67	\$67,333	13,117
2. Public Administration	78,354	(11,619)	11.8%	0.84	\$66,111	2,911
<i>State Government</i>	39,185	12,474	5.9%	1.95	-	1,456
<i>Local Government</i>	22,983	(19,428)	3.5%	0.42	-	854
<i>Federal Government</i>	16,184	1,354	2.4%	1.48	-	601
3. Finance and Insurance Industry	78,407	(5,993)	11.8%	2.28	\$170,624	1,695
4. Professional, Scientific and Technical Services Industry	73,897	1,692	11.2%	1.62	\$108,504	7,550
5. Educational Services Industry	50,247	6,585	7.6%	3.28	\$64,627	5,376
6. Accommodation and Food Services Industry	49,577	6,143	7.5%	1.06	\$25,956	4,622
7. Administrative and Support and Waste Management Remediation Services Industry	32,124	(7,675)	4.9%	1.01	\$46,005	3,286
8. Retail Trade Industry	30,477	(360)	4.6%	0.45	\$30,664	655
9. Other Services (except Public Administration)	29,279	2,967	4.4%	0.89	\$37,933	1,264
10. Real Estate and Rental and Leasing Industry	21,382	2,227	3.2%	0.75	\$80,999	465
11. Transportation and Warehousing Industry	18,537	(5,893)	2.8%	0.88	\$49,115	(426)
12. Information Industry	16,407	(5,844)	2.5%	1.28	\$88,463	1,583
13. Arts, Entertainment, and Recreation Industry	14,712	2,452	2.2%	1.00	\$79,502	1,383
14. Construction Industry	13,864	(5,794)	2.1%	0.41	\$90,825	28
15. Manufacturing Industry	9,545	(8,596)	1.4%	0.20	\$73,448	175
16. Wholesale Trade Industry	9,256	(1,672)	1.4%	0.41	\$79,231	283
17. Management of Companies and Enterprises	6,243	(4,022)	0.9%	0.86	\$122,906	643
18. Utilities Industry	2,441	(249)	0.4%	-	\$102,170	63
19. Agriculture, Forestry, Fishing and Hunting and Mining	180	(1)	0.0%	-	\$51,720	26
<b>Total</b>	<b>657,461</b>	<b>(9,262)</b>	<b>99.3%</b>	<b>-</b>	<b>\$78,375</b>	<b>47,610</b>

- Projections for 2010-2015 are based upon the New England Economic Partnership (NEEP) May 2011 forecast.
- 2010 employment data is a preliminary estimate based on 2010 annual data from DWD and 2009 BEA data.
- Because of low employment, Agriculture and Mining were combined for this table.

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