



GOVERNOR'S COUNCIL FOR WORKFORCE AND ECONOMIC DEVELOPMENT

EDUCATION

ECONOMIC DEVELOPMENT

EMPLOYMENT

STATE OF OKLAHOMA

2005 HOSPITALITY, RECREATION & TOURISM CLUSTER ANALYSIS

DEFINITION OF INDUSTRY

The Hospitality, Recreation and Tourism (HRT) industry cluster has all types of recreation and tourism firms, from theaters to spectator sports, from bingo halls to hotels, from bowling centers to marinas. This cluster includes travel agencies but does not include eating establishments, which are in retail.

SIGNIFICANCE AND HIGHLIGHTS

The HRT cluster accounts for just over 2 percent of state employment. Almost 95% of the firms have 50 or fewer employees, making this a cluster largely comprised of small- and medium-sized employers. A little over half of the cluster's employees work for 5% of the firms. In phone surveys with a few of the Native American tribes, which have expanding casinos and gaming halls, employment data is expected to increase dramatically over the next several years.

Wages in the HRT cluster are very low, which could partially be explained by seasonal work. A number of these industries require little education for employment.

Oklahoma's location quotient for the HRT cluster is .7, which is a low proportion compared to the nation.

DATA SOURCES

Data used for this analysis was obtained from the Oklahoma Employment Security Commission and included filings of Oklahoma employers as of March 2004.

CLUSTER STATISTICS

Employer Units	2,363
Number of Employees	31,591
Percent of Total Oklahoma Employment	2.2%
Net Employment Change between 2002 and 2004	-4,801
Average Annual Wages	\$15,848
Location Quotient	0.7
Change in Location Quotient 2002-2004	-0.03

TOP FIVE INDUSTRIES IN THE HOSPITALITY, RECREATION & TOURISM CLUSTER

The top five industries in the hospitality, recreation & tourism cluster employ 22,352 people, which represents 70.8% of the total employment (31,591) in the cluster.

NAICS	Industry	Employment	Percent of Cluster
721110	Hotels (except Casino Hotels) and Motels	9,470	30.0%
713940	Fitness and Recreational Sports Centers	4,789	15.2%
713290	Other Gambling Industries	3,989	12.6%
713910	Golf Courses and Country Clubs	2,291	7.3%
713210	Casinos (except Casino Hotels)	1,813	5.7%

TOP EMPLOYERS IN THE HOSPITALITY, RECREATION & TOURISM CLUSTER

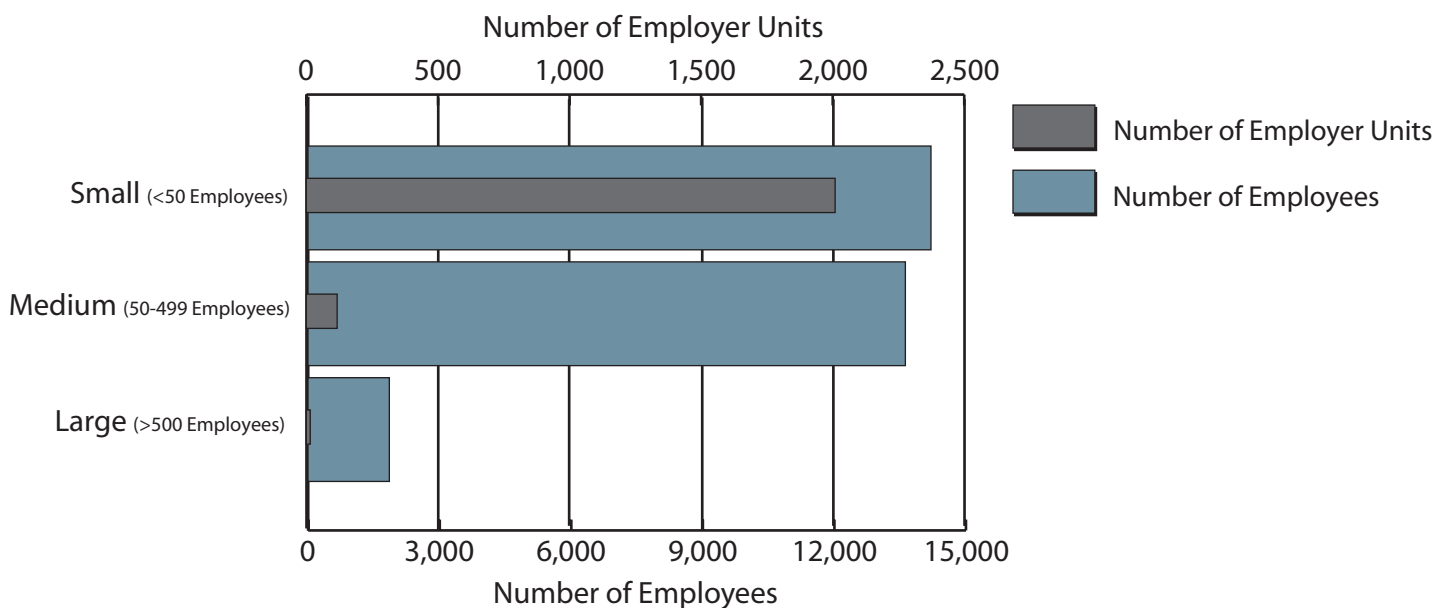
Company Name	Employee Range
Chickasaw Enterprises	2,841 across 11 facilities
Cherokee Nation Enterprises	1,935 in all the casinos, 750-999 just in Catoosa
Biltmore Hotel Oklahoma	250-499
Doubletree Downtown	250-499
Marriott Tulsa Southern Hills	250-499
Marriott Conference Centers	250-499
Renaissance Hotel Of Oklahoma	250-499
Adams Mark - Tulsa	100-249
Bordertown Bingo	100-249
Choctaw Casino - Durant	100-249
Comanche Nation Games	100-249
Embassy Suites Oklahoma City	100-249
Fort Sill Apache Casino	100-249
Heartland Hotel Corporation	100-249
Holiday Inns	100-249
Kickapoo Casino	100-249
Lucky Star Bingo	100-249
Oklahoma City Golf And Country Club	100-249
Oklahoma City Zoo	100-249
Omniplex Science Museum	100-249
Quail Creek Golf & Country Club Inc	100-249
Remington Park Inc	100-249
Sheraton Hotel Tulsa	100-249
Sheraton Oklahoma City	100-249
Simmons Center Foundation	100-249
Southern Hills Country Club	100-249
The Stables	100-249
Thunderbird Entertainment Center	100-249
Young Men's Christian Assn	100-249

INDUSTRY LOCATION QUOTIENTS

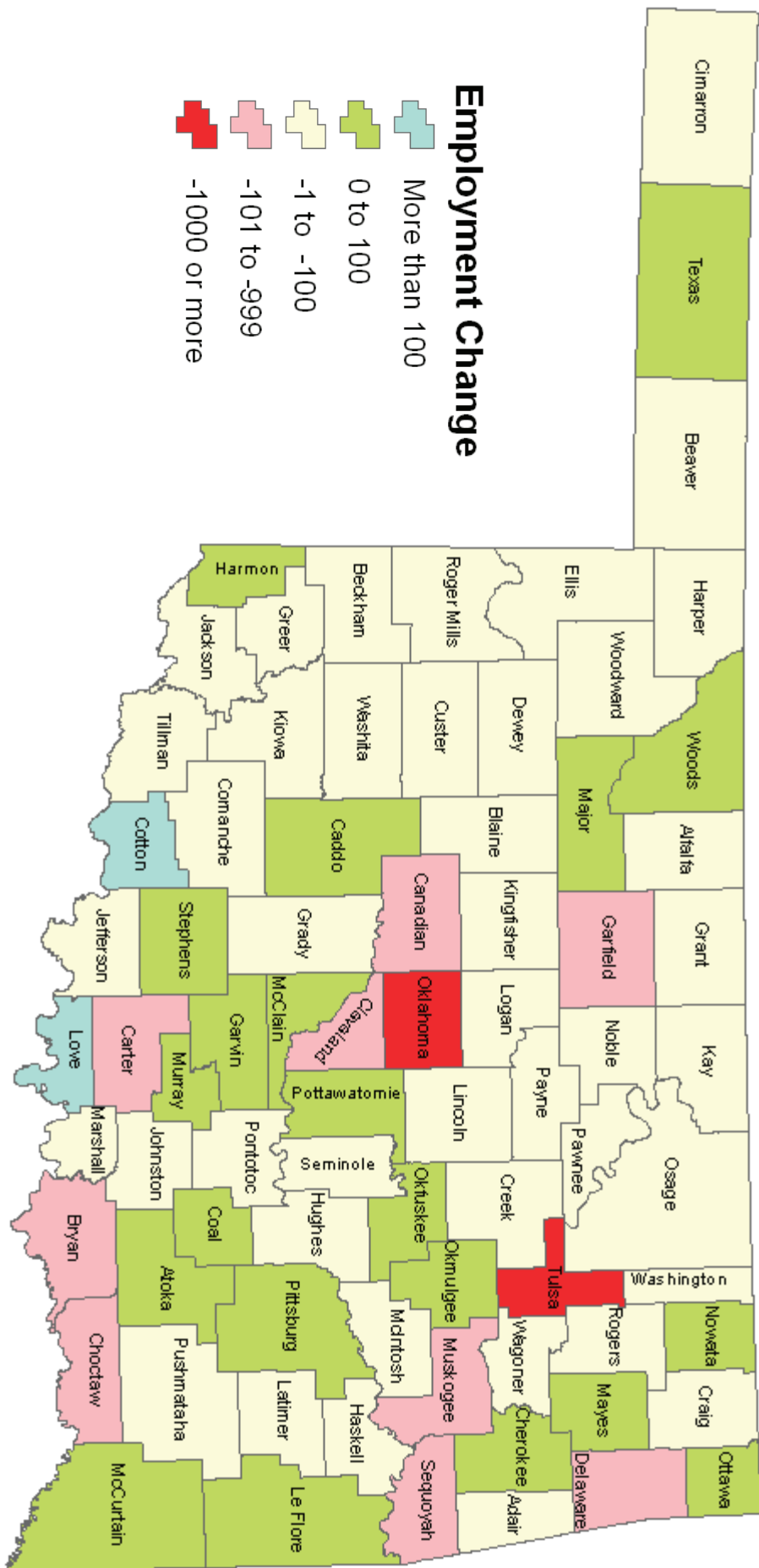
NAICS	Industry	Location Quotient	LQ Change
713200	Gambling Industries	3.16	0.48
721300	Rooming and Boarding Houses	1.97	0.23
713900	Other Amusement and Recreation Industries	1.30	-0.12
711200	Spectator Sports	1.03	-0.28
114210	Hunting and Trapping	0.88	1.66
721100	Traveler Accommodation	0.81	0.07
721200	RV Parks and Recreational Camps	0.77	-0.09
711100	Performing Arts Companies	0.76	0.15
712100	Museums, Historical Sites, and Similar Institutions	0.75	0.23
711300	Promoters of Events	0.61	-0.21
561500	Travel Arrangement and Reservation Services	0.59	0.29
512100	Motion Picture Theaters	0.56	0.03
711500	Independent Artists, Writers and Performers	0.45	0.24
713100	Amusement Parks and Arcades	0.35	-0.52
711400	Agents and Managers	0.24	-0.18
611600	Sports and Recreation Instruction	0.19	0.17
487210	Scenic and Sightseeing Transportation, Water	0.14	-0.26
487110	Scenic and Sightseeing Transportation, Land	0.05	-0.07

DISTRIBUTION OF EMPLOYER UNITS & JOBS BY EMPLOYER SIZE (MARCH 2004)

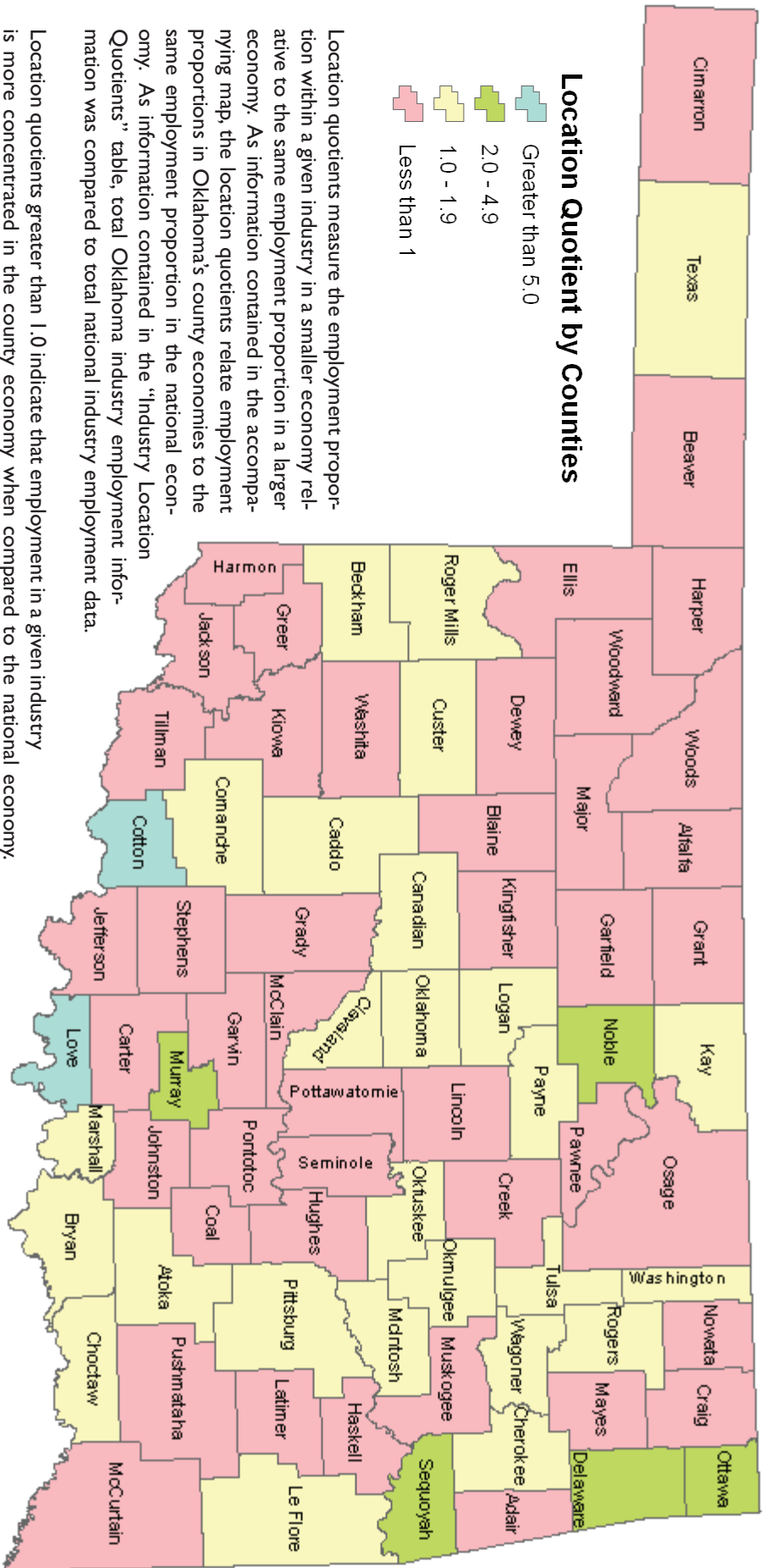
Range	Employer Units	Employees
Small (<50 employees)	2,009	14,198
Medium (50-500 employees)	119	13,615
Large (>500 employees)	4	1,864



HOSPITALITY, RECREATION & TOURISM CLUSTER EMPLOYMENT CHANGE 2002-2004



HOSPITALITY, RECREATION & TOURISM CLUSTER COUNTY LOCATION QUOTIENTS



Location quotients measure the employment proportion within a given industry in a smaller economy relative to the same employment proportion in a larger economy. As information contained in the accompanying map, the location quotients relate employment proportions in Oklahoma's county economies to the same employment proportion in the national economy. As information contained in the "Industry Location Quotients" table, total Oklahoma industry employment information was compared to total national industry employment data.

Location quotients greater than 1.0 indicate that employment in a given industry is more concentrated in the county economy when compared to the national economy. Conversely, location quotients less than 1.0 indicate that industry employment is less concentrated in the county economy when compared to the national economy. Location quotients equal to 1.0 indicate that the employment proportions within a given industry are equal in the county and the national economies.

In the Hospitality, Tourism & Recreation cluster, Sequoyah county's location quotient equals 2.6. This indicates that the proportion of people employed in the HRT cluster in Sequoyah county is 260% of the HRT employment proportion in the nation as a whole. Conversely, Pontotoc county's location quotient equals 0.8, which indicates that the proportion of people employed in the HRT cluster in Pontotoc county is 80% of the HRT employment proportion in the nation as a whole.

From the "Industry Location Quotients" table, the location quotient for the Performing Arts Industry (NAICS 711100) equaled 0.76, which indicates that the proportion of people employed in this industry in Oklahoma is 76% of the same national proportion.

The most current national data available to compute location quotients is from the U.S. Bureau of Labor Statistics for 2004.

HOSPITALITY, RECREATION & TOURISM INDUSTRIES

114210 HUNTING AND TRAPPING

This industry comprises establishments primarily engaged in one or more of the following: (1) commercial hunting and trapping; (2) operating commercial game preserves, such as game retreats; and (3) operating hunting preserves.

487110 SCENIC AND SIGHTSEEING TRANSPORTATION, LAND

This industry comprises establishments primarily engaged in providing scenic and sightseeing transportation on land, such as sightseeing buses and trolleys, steam train excursions, and horse-drawn sightseeing rides. The services provided are usually local and involve same-day return to place of origin.

487210 SCENIC AND SIGHTSEEING TRANSPORTATION, WATER

This industry comprises establishments primarily engaged in providing scenic and sightseeing transportation on water. The services provided are usually local and involve same-day return to place of origin.

512131 MOTION PICTURE THEATERS (EXCEPT DRIVE-INS)

This U.S. industry comprises establishments primarily engaged in operating motion picture theaters (except drive-ins) and/or exhibiting motion pictures or videos at film festivals, and so forth.

512132 DRIVE-IN MOTION PICTURE THEATERS

This U.S. industry comprises establishments primarily engaged in operating drive-in motion picture theaters.

561500 TRAVEL ARRANGEMENT AND RESERVATION SERVICES

Agents selling travel, tour, and accommodations services to the public and commercial clients.

611620 SPORTS AND RECREATION INSTRUCTION

This industry comprises establishments, such as camps and schools, primarily engaged in offering instruction in athletic activities to groups of individuals. Overnight and day sports instruction camps are included in this industry.

711110 THEATER COMPANIES AND DINNER THEATERS

This industry comprises (1) companies, groups, or theaters primarily engaged in producing the following live theatrical presentations: musicals; operas; plays; and comedy, improvisational, mime, and puppet shows and (2) establishments, commonly known as dinner theaters, engaged in producing live theatrical productions and in providing food and beverages for consumption on the premises. Theater groups or companies may or may not operate their own theater or other facility for staging their shows.

711120 DANCE COMPANIES

This industry comprises companies, groups, or theaters primarily engaged in producing all types of live theatrical dance (e.g., ballet, contemporary dance, folk dance) presentations. Dance companies or groups may or may not operate their own theater or other facility for staging their shows.

711130 MUSICAL GROUPS AND ARTISTS

This industry comprises (1) groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions) and (2) independent (i.e., freelance) artists primarily engaged in providing live musical entertainment. Musical groups and artists may perform in front of a live audience or in a studio, and may or may not operate their own facilities for staging their shows.

711190 OTHER PERFORMING ARTS COMPANIES

This industry comprises companies or groups (except theater companies, dance companies, musical groups, and artists) primarily engaged in producing live theatrical presentations.

711211 SPORTS TEAMS AND CLUB

This U.S. industry comprises professional or semiprofessional sports teams or clubs primarily engaged in participating in live sporting events, such as baseball, basketball, football, hockey, soccer, and jai alai games, before a paying audience. These establishments may or may not operate their own arena, stadium, or other facility for presenting these events.

711212 RACETRACKS

This U.S. industry comprises establishments primarily engaged in operating racetracks. These establishments may also present and /or promote the events, such as auto, dog, and horse races, held in these facilities.

711219 OTHER SPECTATOR SPORTS

This U.S. industry comprises (1) independent athletes, such as professional or semiprofessional golfers, boxers, and race car drivers, primarily engaged in participating in live sporting or racing events before a paying audience; (2) owners of racing participants, such as cars, dogs, and horses, primarily engaged in entering them in racing events or other spectator events; and (3) establishments, such as sports trainers, primarily engaged in providing specialized services required to support participants in sports events or competitions.

711310 PROMOTERS OF PERFORMING ARTS, SPORTS, AND SIMILAR EVENTS WITH FACILITIES

This industry comprises establishments primarily engaged in (1) organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, held in facilities that they manage and operate and/or (2) managing and providing the staff to operate arenas, stadiums, theaters, or other related facilities for rent to other promoters.

711320 PROMOTERS OF PERFORMING ARTS, SPORTS, AND SIMILAR EVENTS WITHOUT FACILITIES

This industry comprises promoters primarily engaged in organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, in facilities that are managed and operated by others. Theatrical (except motion picture) booking agencies are included in this industry.

711410 AGENTS AND MANAGERS FOR ARTISTS, ATHLETES, ENTERTAINERS, AND OTHER PUBLIC FIGURES

This industry comprises establishments of agents and managers primarily engaged in representing and/or managing creative and performing artists, sports figures, entertainers, and other public figures. The representation and management includes activities, such as representing clients in contract negotiations; managing or organizing client's financial affairs; and generally promoting the careers of their clients.

711510 INDEPENDENT ARTISTS, WRITERS, AND PERFORMERS

This industry comprises independent (i.e., freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions. This industry also includes athletes and other celebrities exclusively engaged in endorsing products and making speeches or public appearances for which they receive a fee.

712110 MUSEUMS

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

712120 HISTORICAL SITES

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

712130 ZOOS AND BOTANICAL GARDENS

This industry comprises establishments primarily engaged in the preservation and exhibition of live plant and animal life displays.

712190 NATURE PARKS AND OTHER SIMILAR INSTITUTIONS

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

713110 AMUSEMENT AND THEME PARKS

This industry comprises establishments, known as amusement or theme parks, primarily engaged in operating a variety of attractions, such as mechanical rides, water rides, games, shows, theme exhibits, refreshment stands, and picnic grounds. These establishments may lease space to others on a concession basis.

713120 AMUSEMENT ARCADES

This industry comprises establishments primarily engaged in operating amusement (except gambling, billiard, or pool) arcades and parlors.

713210 CASINOS (EXCEPT CASINO HOTELS)

This industry comprises establishments primarily engaged in operating gambling facilities that offer table wagering games along with other gambling activities, such as slot machines and sports betting. These establishments often provide food and beverage services. Included in this industry are floating casinos (i.e., gambling cruises, riverboat casinos).

713290 OTHER GAMBLING INDUSTRIES

This industry comprises establishments primarily engaged in operating gambling facilities (except casinos or casino hotels) or providing gambling services.

713910 GOLF COURSES AND COUNTRY CLUBS

This industry comprises (1) establishments primarily engaged in operating golf courses (except miniature) and (2) establishments primarily engaged in operating golf courses, along with dining facilities and other recreational facilities that are known as country clubs. These establishments often provide food and beverage services, equipment rental services, and golf instruction services.

713920 SKIING FACILITIES

This industry comprises establishments engaged in (1) operating downhill, cross-country, or related skiing areas and/or (2) operating equipment, such as ski lifts and tows. These establishments often provide food and beverage services, equipment rental services, and ski instruction services. Four-season resorts without accommodations are included in this industry.

713930 MARINAS

This industry comprises establishments, commonly known as marinas, engaged in operating docking and/or storage facilities for pleasure craft owners, with or without one or more related activities, such as retailing fuel and marine supplies; and repairing, maintaining, or renting pleasure boats.

713940 FITNESS AND RECREATIONAL SPORTS CENTERS

This industry comprises establishments primarily engaged in operating fitness and recreational sports facilities featuring exercise and other active physical fitness conditioning or recreational sports activities, such as swimming, skating, or racquet sports.

713950 BOWLING CENTERS

This industry comprises establishments engaged in operating bowling centers.

713990 ALL OTHER AMUSEMENT AND RECREATION INDUSTRIES

This industry comprises establishments (except amusement parks and arcades; gambling industries; golf courses and country clubs; skiing facilities; marinas; fitness and recreational sports centers; and bowling centers) primarily engaged in providing recreational and amusement services.

721110 HOTELS (EXCEPT CASINO HOTELS) AND MOTELS

This industry comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels, and motels. The establishments in this industry may offer food & beverage services, recreational services, conference rooms & convention services, laundry services, parking, and other services.

721120 CASINO HOTELS

This industry comprises establishments primarily engaged in providing short-term lodging in hotel facilities with a casino on the premises. The casino on premises includes table wagering games and may include other gambling activities, such as slot machines and sports betting. These establishments generally offer a range of services and amenities, such as food and beverage services, entertainment, valet parking, swimming pools, and conference and convention facilities.

721191 BED-AND-BREAKFAST INNS

Short-term lodging in private homes or small bldgs. converted for this use; characterized by highly personalized service and inclusion of full breakfast

721199 ALL OTHER TRAVELER ACCOMMODATION

Short-term lodging such as guest houses, housekeeping cabins and cottages, tourist homes, youth hostels

721211 RV (RECREATIONAL VEHICLE) PARKS AND CAMPGROUNDS

Catering to outdoor enthusiasts with a range of recreational activities

721214 RECREATIONAL AND VACATION CAMPS (EXCEPT CAMPGROUNDS)

Including fishing camps, hunting camps, outdoor adventure retreats, vacation camps, wilderness camps

721310 ROOMING AND BOARDING HOUSES

Temporary or longer-term accommodations which may include complementary services, including dormitories, fraternity houses, rooming houses, sorority houses, worker's camps

Source: North American Industry Classification System, 2002, Executive Office of the President, Office of Management and Budget.