

# Hospitality and Tourism



6th

Largest **hospitality and tourism** cluster in Florida.



76,534

Employed in the **hospitality and tourism** cluster.



3,282

Establishments in the **hospitality and tourism** cluster.



5.0%

Average annual employment growth in the **hospitality and tourism** cluster.



2,341

Job seekers from top 20 occupations in the **hospitality and tourism** cluster.

# Industry Overview

The hospitality and tourism cluster is the largest cluster in the five-county region in Southwest Florida based on employment. Employing some 76,534 people in the region, hospitality and tourism provides entry-level employment opportunities to young and first-time workers as well as careers to low-skilled and high-skilled workers interested in careers in the region. What is more, hospitality and tourism is a dynamic industry characterized by continual capital investment to the region in an effort to capitalize on the comparative advantages for which it is best known, namely, warm winters and beautiful gulf beaches.

We define the hospitality and tourism cluster as a combination of two different clusters: the traded hospitality cluster and the local hospitality cluster. The traded hospitality cluster consists of industries tailored to serve markets in other regions and nations. Firms included in the traded hospitality cluster include resorts, hotels, spectator sports, museums, theatres, and amusements, among others. Cultural and artistic activities are especially well represented. In between the newly-renovated JW Marriott resort on Marco Island to the south and Fisherman's Village in Punta Gorda to the north is a myriad of thriving businesses from this cluster. These include large-chain hotels as well as smaller operations, theatres that attract off-Broadway plays and musicals, operas and orchestras, and even a large-scale casino in eastern Collier County.

Although there exists some overlap, the traded hospitality cluster is geared toward two different market segments.

- Retirees, many of whom live in Florida for half the year from fall to spring; and
- Tourists, who visit year round but especially bring higher traffic in December and March.

A key characteristic of the traded hospitality cluster is its seasonality, although as the native population grows and as the region attracts summer tourist traffic from South America, somewhat of a more year-round industry has taken root in recent years.

Spectator sports in particular are popular, with Southwest Florida serving as the spring training home for two Major League Baseball teams, the Boston Red Sox and the Minnesota Twins, both in Lee County. The Red Sox spring training facility, located at JetBlue Park, hosted 15 games in 2016 and had approximately 150,000 visitors during the spring training season. JetBlue Park also serves as a venue for local festivals, conferences and other events. The Minnesota Twins spring training facility, located at Hammond Stadium, hosted 15 games in 2016 and had approximately 121,000 visitors. Hammond Stadium is also home to Fort Myers Miracle, a Minnesota Twins minor league affiliate in the Florida State League, which plays games from April to September. Lee County is also home to the Fort Myers Everblades, a professional hockey team that plays in the 5,090 seat Germain Arena. Charlotte Sports Park in Port Charlotte serves as the spring training facility for the Tampa Bay Rays. Over 68,000 people attended spring training games in 2015, in addition to attendance at Charlotte Stone Crabs games during the Florida State League season.

The local hospitality cluster consists of industries that primarily serve the local market and can be found in every region. Firms included in the local hospitality cluster include full-service restaurants, limited-service restaurants, caterers, golf courses and country clubs, bowling centers, fitness and recreational sports centers, and gift, novelty and souvenir stores.

## Hospitality and Tourism Economic Profile

The traded hospitality cluster consists of 31, six-digit North American Industry Classification System (NAICS) codes including sports teams and clubs, amusement and theme parks, museums, bed-and-breakfast inns, and tour operators. Meanwhile, the local hospitality cluster consists of 12, six-digit NAICS codes including hospitality establishments, recreational facilities and instruction, and gifts and souvenir retailing.

The five-county region ranked sixth in the state of Florida out of 24 workforce regions in employment for both the traded hospitality cluster (15,767 employed in 2015) and for the local hospitality cluster (60,767 employed in 2015). The region had 3,282 establishments for the hospitality and tourism cluster in 2015, with 671 establishments in the traded hospitality cluster and 2,611 establishments in the local hospitality cluster. Southwest Florida saw a 0.6-percent increase in the traded hospitality cluster employment level over the past year, along with a 5.5-percent increase in the local hospitality cluster. Both were greater than the state of Florida average. Southwest Florida also had a 22.1 percent increase in the traded hospitality cluster employment level over the past six years, while the local hospitality cluster had a 32.2 percent increase over the same time span.

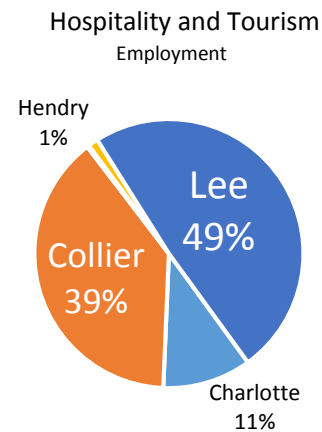
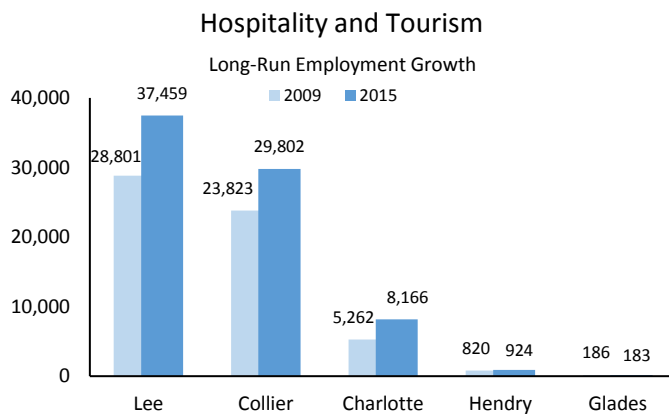
# Hospitality and Tourism

## Economic Profile

	Southwest Florida			Florida		
	Traded	Local	Total	Traded	Local	Total
Employment, 2015	15,767	60,767	76,534	309,856	821,356	1,131,212
Number of Establishments, 2015	671	2,611	3,282	10,232	40,671	50,903
Short-run employment growth, 2014 to 2015	0.6%	5.5%	4.5%	-0.1%	5.3%	3.8%
Long-run employment growth, 2009 to 2015	22.1%	32.2%	22.1%	18.9%	24.1%	22.6%
Average annual employment growth, 2009 to 2015	3.4%	4.8%	5.0%	3.5%	4.4%	4.2%
Workforce Region Employment Ranking, 2015	6th	6th	6th	--	--	--
Location Quotient, Relative to Florida, 2015	1.07	1.56	--	--	--	--
Location Quotient, Relative to United States, 2015	1.67	1.64	--	1.56	1.05	--

Source: County Business Patterns: 2015

## Employment by County



Southwest Florida’s hospitality and tourism cluster comprised of 76,534 employees in 2015. The local hospitality cluster contained most of the employment for the cluster (60,767 employed), while the traded hospitality cluster had 15,767 employed. Lee County was the largest contributor to the cluster, with 37,459 employees. This accounted for 48.9 percent of the total hospitality and tourism employment in Southwest Florida for 2015. This was followed by Collier County (29,802 employees, 38.9 percent of total hospitality and tourism cluster), Charlotte County (8,166 employees, 10.7 percent of total hospitality and tourism cluster), Hendry County (924 employees, 1.2 percent of total hospitality and tourism cluster) and Glades County (183 employees, less than 1 percent of total hospitality and tourism cluster).

## Hospitality and Tourism Employment

### By County

County	Traded	Local	Total	Percent of Total Employment
Charlotte	2,041	6,125	8,166	10.7%
Collier	7,098	22,704	29,802	38.9%
Glades	53	130	183	0.2%
Hendry	152	772	924	1.2%
Lee	6,423	31,036	37,459	48.9%
<b>Southwest Florida</b>	<b>15,767</b>	<b>60,767</b>	<b>76,534</b>	<b>100.0%</b>

Source: County Business Patterns: 2015

Southwest Florida’s hospitality and tourism cluster had 3,282 establishments in 2015, of which 87.3 percent employed less than 50 employees. Lee County had the most establishments in Southwest Florida followed by Collier County. As shown in the table,

approximately 85 to 90 percent of these establishments had less than 50 employees working for them. In Glades County, 100 percent of the establishments had less than 50 employees.

## Hospitality and Tourism Establishments

By County

County	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Charlotte	130	53	47	88	33	5	0	0	1	357
Collier	394	161	184	247	113	42	5	2	1	1,149
Glades	6	2	3	1	0	0	0	0	0	12
Hendry	26	14	14	12	3	0	0	0	0	69
Lee	612	217	269	385	159	46	6	1	0	1,695
<b>Southwest Florida</b>	<b>1,168</b>	<b>447</b>	<b>517</b>	<b>733</b>	<b>308</b>	<b>93</b>	<b>11</b>	<b>3</b>	<b>2</b>	<b>3,282</b>

Source: County Business Patterns: 2015

Southwest Florida's hospitality and tourism cluster saw a 30-percent increase in employment from 2009 to 2015. This is equivalent to a 4.5 percent average annual growth rate. This growth rate, however, was not evenly distributed among the five counties. Charlotte County had the highest growth rate over the six-year period, measured at 55.2 percent. This increase was accompanied by a large increase in the traded hospitality cluster in Charlotte County, which experienced a 189.5 percent increase over the same time span. Lee County had a growth rate measured at 30.1 percent from 2009 to 2015, with growth coming from both the traded hospitality cluster (24.5 percent increase) and the local hospitality cluster (31.3 percent increase). Collier County had a 25.1 percent increase in employment from 2009 to 2015, with majority of the county's growth coming from the local hospitality cluster (33.1 percent increase). Hendry County had a 12.7 percent increase in employment over the six-year period, with a 29.7 percent increase in the local hospitality cluster and a 32.4 percent decrease in the traded hospitality cluster. Finally, Glades County had a 1.6 percent decrease in employment over the six-year period, with a small increase in the local hospitality cluster (3.2 percent increase) and a larger decrease in the traded hospitality cluster (11.7 percent decrease).

## Hospitality and Tourism Long-Run Employment Growth

By County

County	Traded			Local			Total		
	2009	2015	Percent Change	2009	2015	Percent Change	2009	2015	Percent Change
Charlotte	705	2,041	189.5%	4,557	6,125	34.4%	5,262	8,166	55.2%
Collier	6,767	7,098	4.9%	17,056	22,704	33.1%	23,823	29,802	25.1%
Glades	60	53	-11.7%	126	130	3.2%	186	183	-1.6%
Hendry	225	152	-32.4%	595	772	29.7%	820	924	12.7%
Lee	5,158	6,423	24.5%	23,643	31,036	31.3%	28,801	37,459	30.1%
<b>Southwest Florida</b>	<b>12,915</b>	<b>15,767</b>	<b>22.1%</b>	<b>45,977</b>	<b>60,767</b>	<b>32.2%</b>	<b>58,892</b>	<b>76,534</b>	<b>30.0%</b>

Source: County Business Patterns: 2015

## Employment by Subcluster

The hospitality and tourism cluster is comprised of seven traded subclusters (spectator sports, amusement parks and arcades, cultural and educational entertainment, gambling facilities, other tourism attractions, accommodations and related services, and tourism related services) and three local subclusters (hospitality establishments, recreational facilities and instruction, and gifts and souvenirs retailing). Information regarding employment by subcluster can be found below.

Hospitality establishments was the largest subcluster in Southwest Florida in 2015, accounting for 63.8 percent of the employment in the total cluster. Accommodation and Related Services was the next largest subcluster (14.9 percent of total employment in the

cluster), followed by Recreational Facilities and Instruction (14.8 percent of total employment). The remaining seven subclusters accounted for 2 percent or less, the smallest employment occurring in gambling facilities.

Hospitality and Tourism Employment By Subcluster		
Subcluster	Employment	Percent of Total Employment
<i>Traded Hospitality</i>		
Accommodations and Related Services	11,439	14.9%
Other Tourism Attractions	1,389	1.8%
Tourism Related Services	1,276	1.7%
Spectator Sports	965	1.3%
Cultural and Educational Entertainment	427	0.6%
Amusement Parks and Arcades	165	0.2%
Gambling Facilities	106	0.1%
<i>Local Hospitality</i>		
Hospitality Establishments	48,796	63.8%
Recreational Facilities and Instruction	11,356	14.8%
Gifts and Souvenirs Retailing	615	0.8%
<b>Total</b>	<b>76,534</b>	<b>100.0%</b>

Source: County Business Patterns: 2015

The total number of establishments in the hospitality and tourism cluster was 3,282 in 2015. The table of the 10 subclusters in this cluster indicates that the largest number of establishments is in the Hospitality Establishments subcluster (2,215) and the smallest number is in gambling facilities and spectator sports (11). The number of employees per establishment in all the subclusters is predominantly less than 50. Additionally, a little over a third (36 percent) of the establishments in all the subclusters employed just 1-4 employees. Employment in four of the subclusters never exceeded 100 per establishment (Amusement Parks and Arcades, Cultural and Educational Entertainment, Gambling Facilities, and Tourism Related Services).

Hospitality and Tourism Establishments By Subcluster										
Subcluster	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	Total
<i>Traded Hospitality</i>										
Accommodations and Related Services	70	25	36	49	19	11	6	3	2	221
Tourism Related Services	150	24	11	12	4	0	0	0	0	201
Other Tourism Attractions	73	26	14	11	6	1	0	0	0	131
Cultural and Educational Entertainment	54	12	7	0	2	0	0	0	0	75
Amusement Parks and Arcades	14	5	1	0	1	0	0	0	0	21
Spectator Sports	7	0	1	0	1	0	2	0	0	11
Gambling Facilities	5	3	2	0	1	0	0	0	0	11
<i>Local Hospitality</i>										
Hospitality Establishments	623	301	406	616	223	45	1	0	0	2,215
Recreational Facilities and Instruction	111	31	27	41	51	35	2	0	0	298
Gifts and Souvenirs Retailing	61	20	12	4	0	1	0	0	0	98
<b>Total</b>	<b>1,168</b>	<b>447</b>	<b>517</b>	<b>733</b>	<b>308</b>	<b>93</b>	<b>11</b>	<b>3</b>	<b>2</b>	<b>3,282</b>

Source: County Business Patterns: 2015

Employment in hospitality and tourism, as shown broken down by subclusters, grew significantly in six of the 10 subclusters. The tourism related services subcluster had the largest rate of increase in employment within the cluster. Over the six-year period, employment in this subcluster grew 53.9 percent, or about 7.5 percent annually. This was closely followed by the 33 percent rate of growth in the hospitality establishments' subcluster, during the same six-year period. Two other subclusters experienced decreases in employment over the six-year period, with the gambling facilities subcluster showing the largest decline in employment. Employment in this subcluster fell by about 89.5 percent, as 899 jobs were lost between 2009 and 2015.

Hospitality and Tourism Long-Run Employment Growth				
By Subcluster				
Subcluster	Employment		Percent Change	Average Annual Percent Change
	2009	2015		
<i>Traded Hospitality</i>				
Tourism Related Services	829	1,276	53.9%	7.5%
Accommodations and Related Services	8,679	11,439	31.8%	4.7%
Other Tourism Attractions	1,082	1,389	28.4%	4.3%
Spectator Sports	752	965	28.3%	4.2%
Cultural and Educational Entertainment	408	427	4.7%	0.8%
Amusement Parks and Arcades	160	165	3.1%	0.5%
Gambling Facilities	1,005	106	-89.5%	-31.3%
<i>Local Hospitality</i>				
Hospitality Establishments	36,689	48,796	33.0%	4.9%
Recreational Facilities and Instruction	8,569	11,356	32.5%	4.8%
Gifts and Souvenirs Retailing	719	615	-14.5%	-2.6%
<b>Total</b>	<b>58,892</b>	<b>76,534</b>	<b>30.0%</b>	<b>4.5%</b>

Source: County Business Patterns: 2015

# Workforce Ranking

Of all the workforce regions in the state of Florida, the Southwest Florida region ranked sixth with most employees in the hospitality and tourism cluster in 2015. Southwest Florida ranked just below the Northeast Florida workforce region (ranked fifth, 78,282 employees) and above the Tampa Bay workforce region (ranked seventh, 76,534 employees). A complete list of the workforce rankings by number of employees in the hospitality and tourism cluster can be found below.

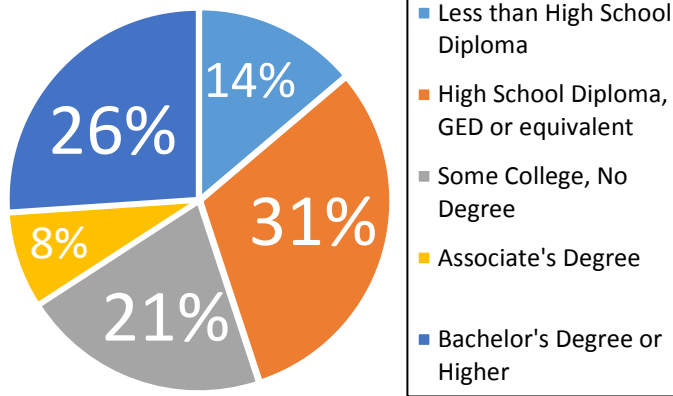
Hospitality and Tourism Workforce Rankings		
Rank	Workforce Region	Employment Level
1	Central Florida	237,323
2	South Florida	158,301
3	Broward	97,694
4	Palm Beach County	87,672
5	Northeast Florida	78,282
<b>6</b>	<b>Southwest Florida</b>	<b>76,534</b>
7	Tampa Bay	74,224
8	Pinellas	55,581
9	Suncoast	38,881
10	Flagler Volusia	30,384
11	Research Coast	26,811
12	Brevard	25,461
13	Polk	21,543
14	Pasco Hernando	18,898
15	Escarosa	18,845
16	Capital Region	18,748
17	Okaloosa Walton	18,717
18	North Central Florida	15,123
19	Gulf Coast	14,915
20	Citrus Levy Marion	14,650
21	Heartland	3,742
22	Florida Crown	3,130
23	Chipola	2,405
24	North Florida	2,302

Source: County Business Patterns: 2015

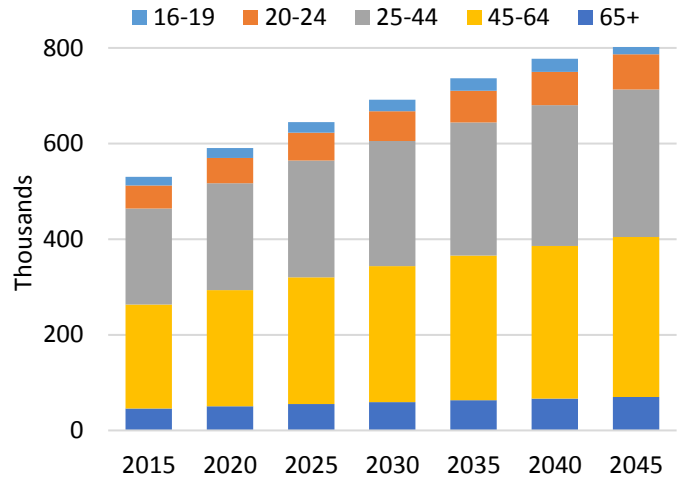
## Workforce Profile

Many companies choose to operate in Southwest Florida due to its workforce. Of the region's adult population, 26 percent have a Bachelor's Degree or higher, while 86 percent have at least a high school diploma. Florida Gulf Coast University conferred 2,331 Bachelor's Degrees to students during the 2015-2016 academic year, while Florida Southwestern State College, with its four campuses throughout the region, conferred 1,942 Associate's Degrees and 341 Bachelor's Degrees during the 2014-2015 academic year. Other educational institutions serving the area include Hodges University in Naples and Kaiser University in Fort Myers. Meanwhile, regional training programs, such as CareerSource Florida, provide training programs and certificates in numerous areas. Furthermore, the composition of the workforce is expected to change as the population grows over the next 25 years. Southwest Florida's population is expected to grow 50 percent by 2045, expanding the region's customer base while increasing its labor force by 54 percent.

## Educational Attainment



## Projected Labor Force



## Hospitality and Tourism Occupations By Total Employed

Occupation	Total Working Across All Industries	Number of Available Applicants	Number of Graduates	Entry Wage	Median Wage	Experienced Wage	Education Level
Retail Salespersons	23,266	264	0	\$8.52	\$10.81	\$14.52	High School/GED
Waiters and Waitresses	14,685	186	0	\$8.38	\$9.10	\$11.49	Less than High School
Cashiers	12,132	397	0	\$8.50	\$9.43	\$10.66	High School/GED
Combined Food Preparation and Serving Workers, Including Fast Food	11,644	70	0	\$8.35	\$9.02	\$9.73	Less than High School
First-Line Supervisors of Retail Sales Workers	8,481	93	0	\$13.99	\$18.73	\$25.04	Post Secondary Adult Vocational
Customer Service Representatives	6,670	650	0	\$10.21	\$13.31	\$16.04	Post Secondary Adult Vocational
Cooks, Restaurant	6,107	68	63	\$8.83	\$11.21	\$13.11	Post Secondary Adult Vocational
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	5,463	69	0	\$9.13	\$10.98	\$13.08	Less than High School
Maids and Housekeeping Cleaners	5,410	95	0	\$8.36	\$10.07	\$11.32	Less than High School
Sales Representatives, Services, All Other	4,089	80	0	\$14.89	\$28.52	\$42.21	High School/GED
Security Guards	4,185	71	0	\$9.03	\$10.97	\$12.60	Post Secondary Adult Vocational
Food Preparation Workers	3,753	33	0	\$8.42	\$10.42	\$11.68	Less than High School
First-Line Supervisors of Food Preparation and Serving Workers	3,670	30	0	\$11.04	\$16.69	\$19.88	Post Secondary Adult Vocational
Dishwashers	2,804	21	0	\$8.37	\$9.07	\$9.56	Less than High School
Dining Room and Cafeteria Attendants and Bartender	2,754	20	0	\$8.31	\$9.13	\$10.81	Less than High School
Bartenders	2,581	74	78	\$8.38	\$9.07	\$11.42	Less than High School
Tellers	2,250	31	0	\$10.88	\$13.39	\$15.28	Post Secondary Adult Vocational
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	2,022	28	0	\$8.43	\$10.09	\$11.56	Less than High School
Amusement and Recreation Attendants	1,504	15	0	\$8.37	\$9.22	\$10.50	Less than High School
Hotel, Motel, and Resort Desk Clerks	1,449	34	0	\$8.62	\$11.77	\$13.13	High School/GED

Source: Florida Department of Economic Opportunity, Occupational Supply/Demand Report



# Cluster Highlights

## KEY COMPANY ANNOUNCEMENTS

Hotels typically invest in renovations and upgrades when the economic outlook is positive. A number of major hotels, recreational facilities, and golf courses have engaged in renovating their existing locations between 2015 and 2016.

- The Marco Beach Hotel, which opened in 1965 as a 50 room, two story motel and restaurant, became the Marriott Resort in 1979, with 735 guest rooms. It added a golf club in 1991. In 2015, the hotel closed for renovations amounting to almost \$300 million and reopened in 2016 as the JW Marriott Marco Island. Once completed (planned for 2017), this resort will hold 810 guestrooms and two renovated golf courses. The new hotel is expected to bring 85 new jobs to the local area.
- Naples Grande Beach Resort and Naples Grande Golf Resort recently completed their \$50 million renovation of 474 guestrooms and three restaurants. The championship golf course was a \$9 million renovation project, in collaboration with course architect John Sanford and golf legend Jack Nicklaus. Nicklaus has had a history with this hotel since he was age 11 and shot a 37 on the first nine holes. The expectation is that Nicklaus will bring the property up to the level of AAA-Four Diamond. Additionally, a new pool complex and meeting rooms were completely renovated.
- In late 2015, the Century Link Sports Complex completed renovations totaling \$48.5 million--\$42.5 billion contributed from Lee County and the remaining \$6 million from the Twins. Some of the renovations include upgraded and expanded concourses, improved concessions, and renovations to the restrooms.
- The Hilton Marco Island renovated its 10,000 square feet of beach property on Marco Island, for \$40 million, adding rooms from 298 to 310 and a new restaurant.
- In January, construction of a Westin Hotel conference center began in Cape Coral. The 34,000 square foot facility sold for \$185.5 million in 2014. Its new owners renovated the La Playa Golf Club.
- In mid-2015, Fishermen's Village, one of Punta Gorda's major tourist magnets, maritime port, and dining and retail center overlooking Charlotte Harbor, began a two-phased, \$40-million renovation and redevelopment. In June of 2015, Fishermen's Village Mall and Resort received a TripAdvisor® Certificate of Excellence award.
- Restaurants classified as "casual dining operators and quick service restaurants" are in the process of transforming themselves through "fast casualization" processes. During the evolutionary phase, restaurants are looking for the best markets to grow their concepts. QSR magazine identified and ranked the top 40 markets across the country best "poised for restaurant growth and unit expansion." Ranking was based on three categories—large, medium, or small—based on population. Fort Myers and Naples ranked 13 of 15 in the Top Medium market (markets with one to three million residents). Planned expansions or new locations in Lee and Collier County include Doc Ford's Rum Bar, Duffy's Sports Grill, and Jimmy P's Butcher Shop and Deli.

## EVENTS, AWARDS AND RECOGNITIONS

- In 2015, the Naples-Immokalee-Marco Island area was rated the top community for American Well-Being by the Gallup poll. The poll surveyed residents on their feelings about physical health, social ties, financial security, community and sense of purpose.
- In 2016, June 20th marked National Seashell Day. ABC's *Good Morning America* and *Dancing with the Stars* Ginger Zee traveled to Sanibel's Sundial Beach Resort & Spa to live-broadcast the kickoff of National Seashell Day.
- The Travel Channel designated Naples beach as one of the top 10 beaches in the world. Popular areas stretched from the Naples Pier near Old Naples in the south to Delnor-Wiggins Pass State Park in the north.
- In May 2016, the Culligan City of Palms Basketball Classic received the Fort Myers Chamber of Commerce and Lee County Visitor Convention Bureau-sponsored Chrysalis Award. The 44-year old tournament is moving from Bishop Verot High School to the new 3,300-seat Suncoast Credit Union Arena on the campus of Florida Southwestern State College in Fort Myers. The classic, which will runs in mid-December, is responsible for 2,000 room nights a year in local hotels and \$200,000 in direct spending.
- In 2016, the Gasparilla Inn at Boca Grande ranked the 14th best hotel in the world by *Travel and Leisure*
- *Daily Telegraph*, U.K., described Norman Love Confections (based in Fort Myers) as one of the "10 most amazing shops in the world for chocolate."
- In 2016, *U.S. News & World Report* chose Sanibel Island as one of its best (no. 2 rank) family beach vacations in the USA.

- *Fodors.com* featured Sanibel Island's Bowman's Beach in a roundup of Florida's 7 Best Beaches; Bowman's Beach is featured as the "Best for Seashells"
- Lovers Key State Park in Fort Myers won Best Florida Beach in 10 Best and *USA Today's* Readers' Choice contest.
- *FamilyFun magazine* rated Sanibel, Fla., top overall family attraction.
- *Martha Stewart Living* featured an eight-page print feature on Pine Island in the June, 2016 edition.
- *The New York Times* featured Fort Myers and Sanibel in an article about 20 Family-Friendly Travel Ideas to Get You Going. The round-up identified family-friendly locales and nature showcases.

## Companies

- JW Marriott Marco Island  
[www.jwmarco.com](http://www.jwmarco.com)
- Naples Grande Beach Resort and Naples Grande Golf Resort  
[www.naplesgrande.com](http://www.naplesgrande.com)
- Sanibel Island Sundial Beach Resort and Spa  
[www.sundialresort.com](http://www.sundialresort.com)
- The Gasparilla Inn and Club at Boca Grande  
[www.the-gasparilla-inn.com](http://www.the-gasparilla-inn.com)
- Legacy Harbour Hotel and Suites Fort Myers  
[www.legacyharbourhotel.com](http://www.legacyharbourhotel.com)
- Hilton Marco Island  
[www.hiltonmarcoisland.com](http://www.hiltonmarcoisland.com)
- The Ritz-Carlton of Naples  
[www.ritzcarlton.com](http://www.ritzcarlton.com)
- Hyatt House Naples/ Fifth Avenue  
[www.naples.house.hyatt.com](http://www.naples.house.hyatt.com)
- Hilton Garden Inn Fort Myers Airport/FGCU  
[www.hiltongardeninn3.hilton.com](http://www.hiltongardeninn3.hilton.com)
- Westin Cape Coral Resort at Marina Village  
[www.westincapecoral.com](http://www.westincapecoral.com)
- The Seminole Casino Hotel Immokalee  
[www.seminoleimmokaleecasino.com](http://www.seminoleimmokaleecasino.com)
- The Inn on Fifth and Club Level Suites  
[www.innonfifth.com](http://www.innonfifth.com)
- The Hilton Naples  
[www.hilton.com](http://www.hilton.com)
- The LaPlaya Beach Resort and Club  
[www.laplayaresort.com](http://www.laplayaresort.com)
- Genova Coconut Point  
[www.genova-florida.com](http://www.genova-florida.com)
- Doc Ford's Rum Bar  
[www.docfords.com](http://www.docfords.com)
- Fort Myers Miracle Baseball  
[www.milb.com](http://www.milb.com)
- Boston Red Sox Spring Training Jet Blue Park  
[www.boston.redsox.mlb.com](http://www.boston.redsox.mlb.com)
- Fishermen's Village Punta Gorda  
[www.fishville.com](http://www.fishville.com)
- Culligan City of Palms Classic  
[www.cityofpalmsclassic.com](http://www.cityofpalmsclassic.com)
- Norman Love Confections  
[www.normanloveconfections.com](http://www.normanloveconfections.com)
- Duffy's Sports Grill  
[www.duffysmvp.com](http://www.duffysmvp.com)
- Jimmy P's Butcher Shop  
[www.jimmypsbutchershop.com](http://www.jimmypsbutchershop.com)
- The Artis Center  
[www.artisnaples.org](http://www.artisnaples.org)
- Barbara B Mann Performing Arts Hall  
[www.bbmannpah.com](http://www.bbmannpah.com)
- Billie Swamp Safari  
[www.billieswamp.com](http://www.billieswamp.com)
- Ah-Tah-Thi-Ki Seminole Museum  
[www.ahthathiki.com](http://www.ahthathiki.com)
- Sun Splash Family Waterpark  
[www.sunsplashwaterpark.com](http://www.sunsplashwaterpark.com)
- Edison and Fort Winter Estates  
[www.edisonfordwinterestates.org](http://www.edisonfordwinterestates.org)
- Sanibel Outlets  
[www.sanibeloutlets.com](http://www.sanibeloutlets.com)
- Miromar Outlets  
[www.miromaroutlets.com](http://www.miromaroutlets.com)

# Education & Training

Florida's system of higher and post-secondary education provides hundreds of training programs generating advanced degrees and occupational certificates that prepare students for productive careers in our region. The state university system includes 13 institutions, while community colleges number 28. Furthermore, there are 84 private universities and occupational and technical schools in the state. A list of the top educational institutions producing graduates that work in the hospitality and tourism cluster would include the following:

- Florida Gulf Coast University  
[www.fgcu.edu](http://www.fgcu.edu)
- Hodges University  
[www.hodges.edu](http://www.hodges.edu)
- Rasmussen College  
[www.rasmussen.edu](http://www.rasmussen.edu)
- Broward College  
[www.broward.edu](http://www.broward.edu)
- University of Miami  
[www.miami.edu](http://www.miami.edu)
- Florida State University  
[www.fsu.edu](http://www.fsu.edu)
- University of Central Florida  
[www.ucf.edu](http://www.ucf.edu)
- Florida SouthWestern State College  
[www.fsw.edu](http://www.fsw.edu)
- Keiser University  
[www.keiseruniversity.edu](http://www.keiseruniversity.edu)
- Florida Atlantic University  
[www.fau.edu](http://www.fau.edu)
- Florida International University  
[www.fiu.edu](http://www.fiu.edu)
- Miami-Dade College  
[www.mdc.edu](http://www.mdc.edu)
- University of Florida  
[www.ufl.edu](http://www.ufl.edu)
- University of South Florida  
[www.usf.edu](http://www.usf.edu)

# Cluster Definition

The hospitality and tourism cluster is comprised of 31 six-digit NAICS codes that form seven subclusters. A list of each subcluster and NAICS category, along with the appropriate six-digit NAICS codes, can be found in the table below.

Hospitality and Tourism Breakdown of Subclusters	
Subcluster/NAICS Description	6-Digit NAICS Code
<i>Spectator Sports</i>	
Sports Teams and Clubs	711211
Racetracks	711212
Other Spectator Sports	711219
<i>Amusement Parks and Arcades</i>	
Amusement and Theme Parks	713110
Amusement Arcades	713120
<i>Cultural and Educational Entertainment</i>	
Art Dealers	453920
Museums	712110
Historical Sites	712120
Zoos and Botanical Gardens	712130
Nature Parks and Other Similar Institutions	712190
<i>Gambling Facilities</i>	
Casinos (except Casino Hotels)	713210
Other Gambling Industries	713290
<i>Other Tourism Attractions</i>	
Hunting and Trapping	114210
Skiing Facilities	713920
Marinas	713930
All Other Amusement and Recreation Industries	713990
Recreational and Vacation Camps (except Campgrounds)	721214
<i>Accommodations and Related Services</i>	
Convention and Visitors Bureaus	561591
Hotels (except Casino Hotels) and Motels	721110
Casino Hotels	721120
Bed-and-Breakfast Inns	721191
All Other Traveler Accommodation	721199
RV (Recreational Vehicle) Parks and Campgrounds	721211
Rooming and Boarding Houses	721310
<i>Tourism Related Services</i>	
Scenic and Sightseeing Transportation, Land	487110
Scenic and Sightseeing Transportation, Water	487210
Scenic and Sightseeing Transportation, Other	487990
Recreational Goods Rental	532292
Travel Agencies	561510
Tour Operators	561520
All Other Travel Arrangement and Reservation Services	561599

Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School