



The Economic Impact of the Leisure & Hospitality Sector in Cuyahoga County

A report on the current state of the leisure and hospitality industry, trends in the industry over the past ten years, and estimated economic impact and value of the leisure and hospitality Sector.

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For: The Cuyahoga County
Economic Development
Commission, Department of
Development
Cuyahoga County Council

July 31st, 2023



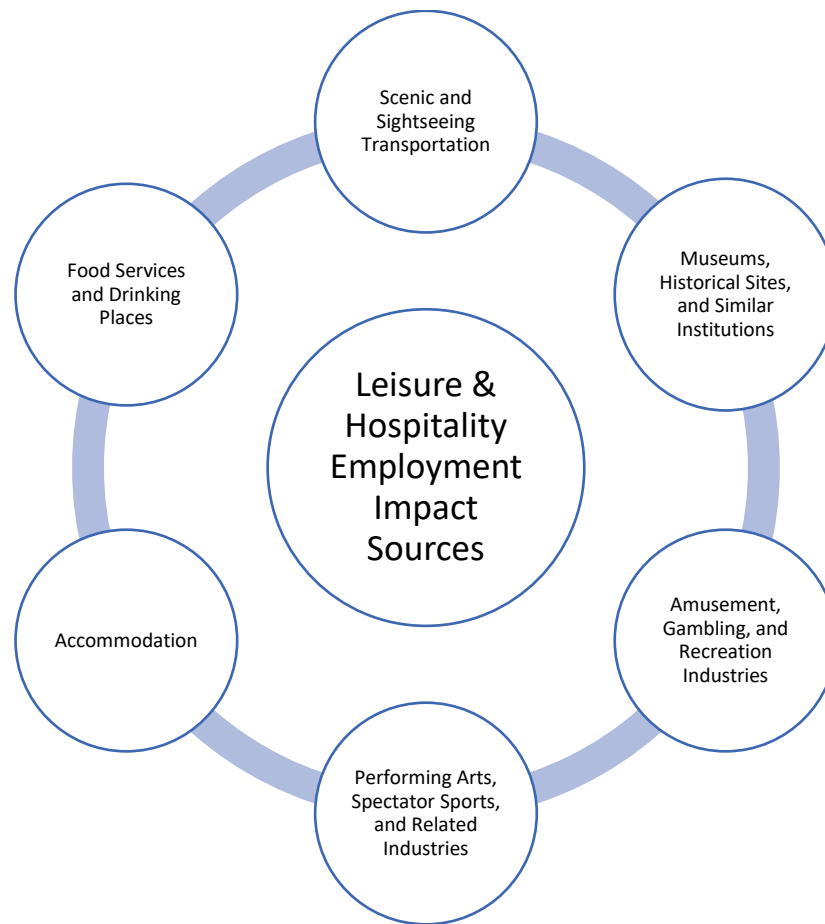
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I. PROJECT DESCRIPTION

The Cuyahoga County Department of Development commissioned the Baldwin Wallace University Community Research Institute to study the importance and impact of the leisure and hospitality industry (LHI) on the economy of Cuyahoga County. Figure 1 illustrates the breakdown of the LHI into six sub-sectors.

Figure 1. Leisure and Tourism and Its Subsectors



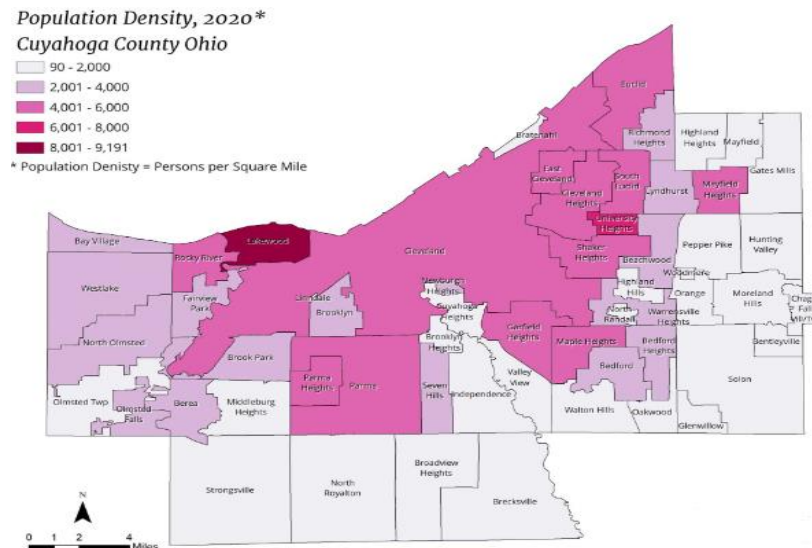
The leisure and hospitality industry represents a regional economic cluster often overlooked in terms of its significant impact on the local economy. Recognizing this gap in understanding, the County and its development partners have taken the initiative to comprehensively assess this crucial economic resource, aiming to gain valuable insights into its value and impact.

This report provides an overview of the current state of the leisure and hospitality industry in Cuyahoga County, highlighting trends observed over the past decade. We compare the County to other aspirant counties nationwide, particularly focusing on location quotients in the leisure and hospitality sector and other critical industries such as smart manufacturing, information technology, and healthcare. We also analyze the causal relationships between employment in the leisure and hospitality sectors and the identified critical sectors.

Furthermore, this study estimates the economic impact and value of the leisure and hospitality industry in the Cuyahoga County area. By establishing a baseline of information, the County and its development partners can effectively monitor, compare, measure, and make informed investment decisions related to various aspects such as promotion and marketing, facilities/destination development, subsidies for public infrastructure, and other private development needs. The baseline assessment encompasses key variables, including tax revenue, employment, income, total economic activity, impacts on different sectors, and historical trends within the leisure and hospitality sector. This information will aid in planning, prioritizing, and budgeting future investments in the leisure and hospitality industry within the County.

The geographic scope of this analysis encompasses all cities and sub-county locations within Cuyahoga County. Figure 2 provides a visual representation of the study's coverage, encompassing the entire geographical area of Cuyahoga County.

Figure 2. Study Area, Cuyahoga County



Source: Cuyahoga County Planning Commission

II. RESEARCH TEAM

This research project was conducted through the Baldwin Wallace University Community Research Institute (CRI). The following CRI/BW personnel were directly involved in the economic impact analysis.

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III. ACKNOWLEDGEMENTS

This report was funded by and prepared for The Cuyahoga County Department of Development (CCDD). The CCDD commissioned the analysis to study the state of the county's leisure and hospitality sector and its economic impacts. The Research Team wants to thank the following individuals and their organizations for providing support and invaluable information for this report:

- Sean Watterson, Senior Consultant, Hospitality Sector Recovery Initiative, The Fund for Our Economic Future
- Paul Herdeg, Director, Cuyahoga County Department of Development
- Bishara Addison, Director of Workforce Innovation, The Fund for Our Economic Future
- Hannah Belsito, Chief Experience Officer, Destination Cleveland
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- Naomi Jia, Business Development Manager, Asia Town Initiative, Midtown Cleveland
- Mark Lammon, Executive Director, Campus District

IV. EXECUTIVE SUMMARY & HIGHLIGHTS

- In 2022, the county's leisure and hospitality sector employed 67,276 workers. This was one out of every ten workers in the county. The projection is that the industry will employ 73,215 workers by 2031.
- In addition to the 67,276 workers directly employed in the leisure and hospitality sector, the sector can be attributed with 23,135 induced and indirect jobs in the county, thus, creating and supporting a total of 90,401 jobs in the county, indicating its substantial influence on local employment opportunities.
- The leisure and hospitality industry in the Cuyahoga County area plays a significant role in the region's economy, accounting for and supporting economic output impact of \$11.2 billion.
- The economic implications of the leisure and hospitality industry extend beyond job creation. The industry's spending activities have contributed approximately \$4 billion in labor income and over \$6.8 billion in wages, rents, and profits to the region. These financial contributions further stimulate economic growth, benefiting individuals, businesses, and the overall economy of the Cuyahoga County area.
- Analyzing the sub-sectors within the leisure and hospitality industry, it is evident that food services and drinking places have the largest economic impact in the County. The performing arts and spectator sports sector follows this. These findings highlight the significance of these sub-sectors in driving economic activity, attracting visitors, and supporting local businesses.
- Outside the industry, the top five sectors impacted by the leisure and hospitality activities in the county include Professional, scientific, and technical services; Administrative and support services; Real Estate; Management of companies and enterprises; Ambulatory healthcare services.
- The top five non-direct leisure and hospitality occupations supported by leisure and hospitality activities in the county include Retail sales workers; Motor vehicle operators; Information and record clerks; Building cleaning & pests control workers; Other management occupations.
- Employment in the Smart Manufacturing and Healthcare Related industries are leading employment indicators in the leisure and hospitality sector, positively impacting leisure and hospitality. Manufacturing and healthcare-related industries jobs led to 7.45 and 3.76 jobs created in the leisure and hospitality sector, respectively.
- Compared to the nineteen peer and aspirant U.S. counties, Cuyahoga County's leisure and Hospitality Sector is the highest paid amongst its peers after correcting for cost inflation.
- There is an inverse relationship between job creation in healthcare services and the leisure and hospitality sectors.
- The leisure and hospitality employment location quotients for 2010-2022 were always below one, whereas the corresponding wage location quotient was mostly above one for the period. Thus, Cuyahoga County's leisure and hospitality sector employment specialization is less than

the national average. Cuyahoga County's leisure and hospitality sector is classified as a high-wage leisure and hospitality enclave due to its low employment location quotient but high-wage location quotient.

- Cuyahoga County's leisure and hospitality employment and wage location quotients are ranked 1,606 and 960 out of the 3,142 US counties. In Ohio, the county is ranked 56th and 16th out of the state's 88 counties.
- Staff surveys indicate high levels of satisfaction with their work environments, including areas of workplace safety, shift scheduling, and working with customers. Staff benefit priorities focused on increased wages, flexible hours, and engaging in meaningful work.
- 44% of business owners said their establishments have fully recovered from the Covid-19 pandemic; 48% have not fully recovered. However, 83% of owners think their business will grow in the next three years.
- Owners identified cost of goods and labor, recruitment and retention of staff, and business consistency as the most significant challenges facing their businesses.
- Establishment owners have generally found local governments to be helpful and supportive of their work. Several mentioned the positive educational approach of the Cuyahoga County Health Department. Community development corporations such as Tremont West and Midtown Cleveland provide important services as liaisons with city government and management of small business support services, including loan applications, storefront renovation funding, and working with developers and business owners to identify land and facilities for growth.
- Establishment owners support development of a central hub office to support businesses through marketing, business education, strengthening relationships between businesses and their communities, and support for access to small business and entrepreneurial loans and funding.
- Overall, the results underscore the vital role played by the leisure and hospitality industry in Cuyahoga County. The industry's substantial economic impact, job creation, and contributions to income and wages emphasize its importance as a key driver of the regional economy. These findings provide valuable insights for policymakers, stakeholders, and community leaders, enabling them to make informed decisions and investments to further support and develop the leisure and hospitality industry in the County.

V. DEFINITIONS USED IN THIS REPORT

Measures

- **Gross Output:** The value of local production required to sustain activities. The total output impact is calculated as the sum of Employee Compensation, Proprietor Income, Tax on Production and Imports, Other Property Income, and Intermediate Inputs.
- **Value Added:** A measure of the impacting industry's contribution to the local community; it includes wages, rents, interest, and profits.
- **Employment:** Estimates are in terms of jobs, not in terms of full-time equivalent employees. Therefore, these jobs may be temporary, part-time, or short-term jobs.
- **Labor Income:** Labor Income (LI) is the sum of Employee Compensation (EC) and Proprietor Income (PI). It represents the combined cost of total payroll paid to employees (e.g., wages and salaries, benefits, payroll taxes) and payments received by self-employed individuals and/or unincorporated businesses.
- **Other Property Income:** Other Property Income (OPI) consists primarily of corporate profits but also includes an allowance for the consumption of fixed capital (depreciation) and net business current transfer payments. Subsidies for government enterprises are considered negative profits. Therefore, any subsidization of a government enterprise will count as a negative value toward the government enterprise Sector's OPI.
- **Taxes on Production & Imports:** Taxes on Production & Imports, Net of Subsidies (TOPI), includes sales and excise taxes, customs duties, property taxes, motor vehicle licenses, severance taxes, other taxes, and special assessments. For all Sectors other than government enterprises, subsidies are counted as a negative value towards TOPI. Tax estimates are provided for Federal, State, County, and sub-county levels.

EFFECTS:

Input-Output (I-O) Analysis forecasts the cascading impacts of economic activity on other industries and geographical regions by considering input purchases, labor payments, and trade. The production within a specific sector in an economy generates demand for production in various sectors, driven by both supply chain spending and worker expenditure. For a more comprehensive understanding of this concept, please refer to the article titled "Industry Impacts: Direct, Indirect, and Induced Effects."

- **Direct Effect:** The Direct Effect denotes the initial exogenous change in final demand, represented in terms of Industry Output, Employment, and/or Labor Income. In the case of Industry, Commodity, and Institutional Spending Pattern Events, the entered Event Value is assumed to be the final demand and is used to determine the Direct Effect of the Event. However, Labor Income, Household Income, and Industry Spending Pattern Events do not generate Direct Effects. In this particular study, the direct effect is determined by the number of individuals employed in Cuyahoga County's leisure and hospitality sector.

- **Indirect Effect:** The Indirect Effects arise from the business-to-business purchases occurring within the region's supply chain, triggered by the initial industry input purchases. In the context of this study, the leisure and hospitality sector's spending on suppliers within the region manifests through the Indirect Effect.
- **Induced Effect:** The Induced Effects stem from the labor income being expended throughout the selected region(s) associated with the industries specified in the Event (direct effect), as well as those impacted indirectly through the supply chain (indirect effects). These effects capture the economic impact generated by the circulation of labor income within the region.

Note that the report also breaks down these measures into impacts by sector. Thus, we can easily identify the sectors most impacted by the leisure and hospitality sectors.

Location Quotients: A location quotient measures the relative concentration of a specific industry in a region by comparing the percentage of activity in that industry in the reference region to the percentage of activity in the same industry in a larger region, typically the state or nation. While the assumptions underlying the location quotient are inherently restrictive, it still indicates the relative importance of a particular industry within a region. A higher location quotient value signifies a greater significance of the industry in the region's economic base. Additionally, changes in location quotient values over time reflect shifts in the industry's relative importance to the region's economic base. Consequently, location quotients are valuable indicators that provide insights into a region's economic foundation.

1. THE STATE OF CUYAHOGA COUNTY'S LEISURE & HOSPITALITY SECTOR

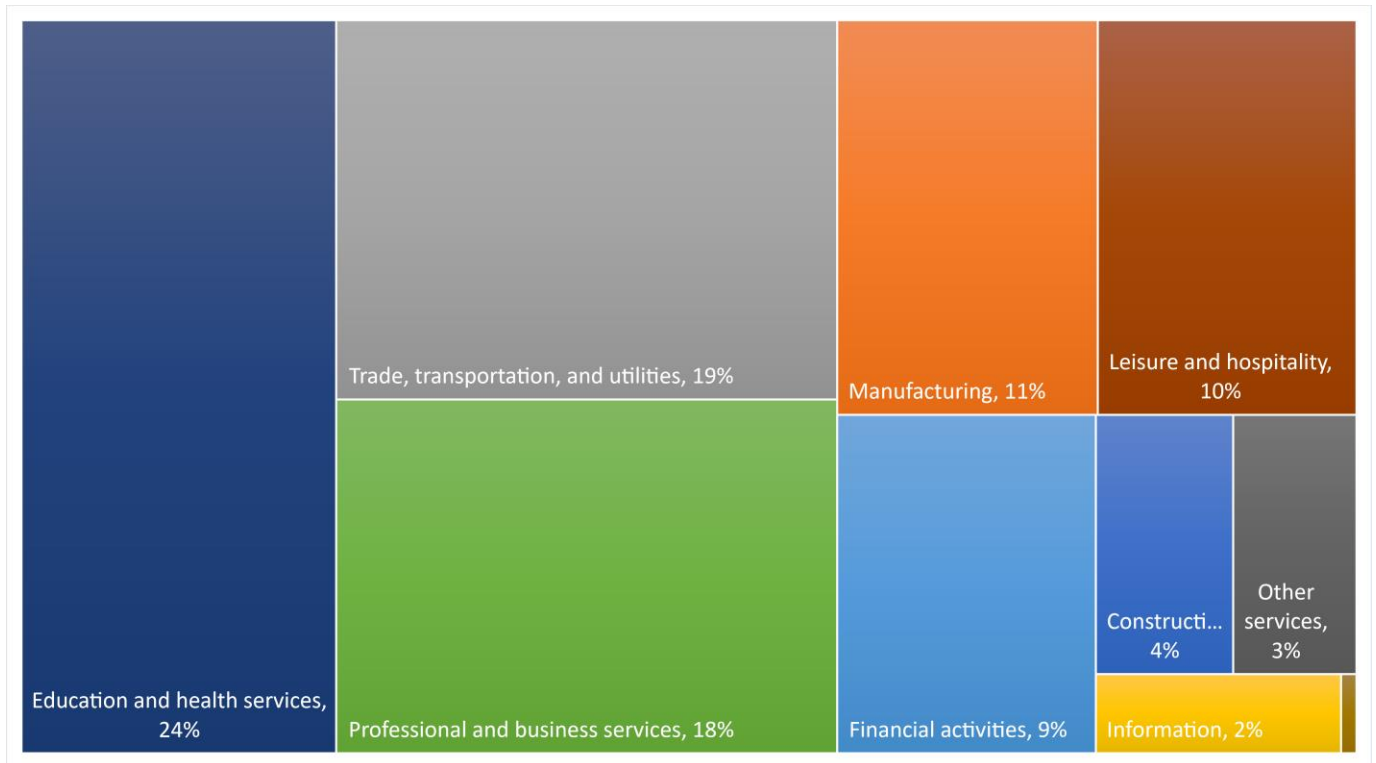
1.1. What the sector entails

The leisure and hospitality sector in Cuyahoga County is a vibrant and significant part of the region's economy. Cuyahoga County, located in the state of Ohio, encompasses the city of Cleveland and its surrounding areas. With a rich cultural heritage and a diverse array of attractions, the County's leisure and hospitality sector plays a crucial role in attracting visitors and enhancing the quality of life for residents. The sector encompasses various establishments and activities, including hotels, restaurants, bars, museums, performing arts venues, sports and entertainment facilities, casinos, and recreational attractions. Cuyahoga County boasts a variety of world-class tourist destinations, such as the Rock and Roll Hall of Fame, Cleveland Museum of Art, Cleveland Metroparks Zoo, Playhouse Square, and professional sports stadiums.

Hotels and accommodations form a vital component of the leisure and hospitality sector in Cuyahoga County. The area offers diverse lodging options, including luxury hotels, boutique accommodations, budget-friendly motels, and bed and breakfast establishments. These lodging facilities cater to both business travelers and tourists, providing comfortable and convenient stays. Cuyahoga County is renowned for its vibrant culinary scene. The County is home to numerous restaurants, ranging from fine dining establishments to casual eateries, offering a variety of cuisines and flavors. From local favorites to international fare, visitors and residents can enjoy a diverse culinary experience. In addition to accommodations and dining, the leisure and hospitality sector in Cuyahoga County encompasses a thriving entertainment and cultural scene. The County hosts various events, festivals, concerts, and performances throughout the year, attracting both locals and visitors. The Playhouse Square, one of the largest performing arts centers in the United States, showcases Broadway shows, musicals, plays, and other cultural performances.

Sports enthusiasts can enjoy professional sports events as Cuyahoga County is home to the Cleveland Cavaliers (NBA), Cleveland Indians (MLB), and Cleveland Browns (NFL). The County's sports venues also host college sports events and other sporting competitions. The leisure and hospitality sector in Cuyahoga County serves as a significant source of employment and economic growth. It provides job opportunities across various occupations, including hotel management, food service, event planning, tourism, and entertainment. In 2022, the sector employed 64,773 residents, accounting for 10% of all private employment in the County. As indicated in Figure 3, the sector is the fifth leading private employer behind education and health service, trade, transportation and utilities, professional and business services, and manufacturing sectors.

Figure 3. Contribution to Total Employment in Cuyahoga County



The sector contributes to the County's tax revenues and fosters economic development through visitor spending, job creation, and business expansion. Furthermore, the leisure and hospitality sector in Cuyahoga County plays a vital role in promoting tourism and attracting visitors from around the country and beyond. The region's attractions, cultural offerings, and entertainment options make it a popular destination for leisure and business travelers alike. The leisure and hospitality sector in Cuyahoga County combines world-class attractions, diverse culinary experiences, cultural events, and a thriving entertainment scene. It contributes significantly to the local economy, enhances the County's overall quality of life, and positions Cuyahoga County as an exciting and desirable destination for visitors and residents alike.

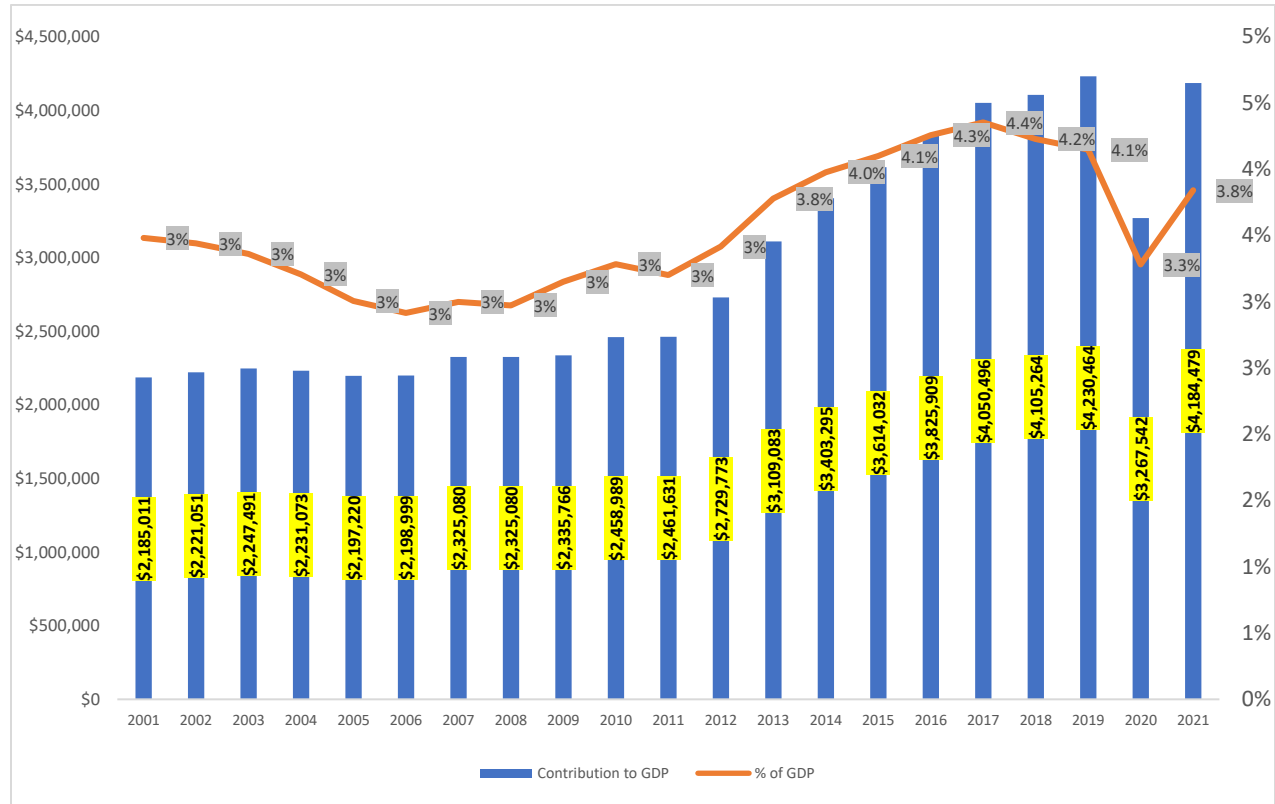
1.2. Contribution to Gross County Product

The leisure and hospitality sector holds immense significance in Cuyahoga County, as evidenced by Figure 4. From 2010 until 2020, the sector exhibited robust growth, with an impressive annual compound growth rate of 6.2%. However, the COVID-19 pandemic significantly impacted the industry, leading to a sharp decline in output. Between 2019 and 2020, the sector's output plummeted by approximately 23%, dropping from \$4.23 billion to \$3.27 billion. This downturn was a result of the pandemic's disruption.

Since 2020, the industry has been on a path of recovery, gradually regaining its output levels. However, it is important to note that the sector's growth trajectory has not yet fully returned to its pre-pandemic levels. Additionally, its contribution to the County's GDP currently stands at 3.8%,

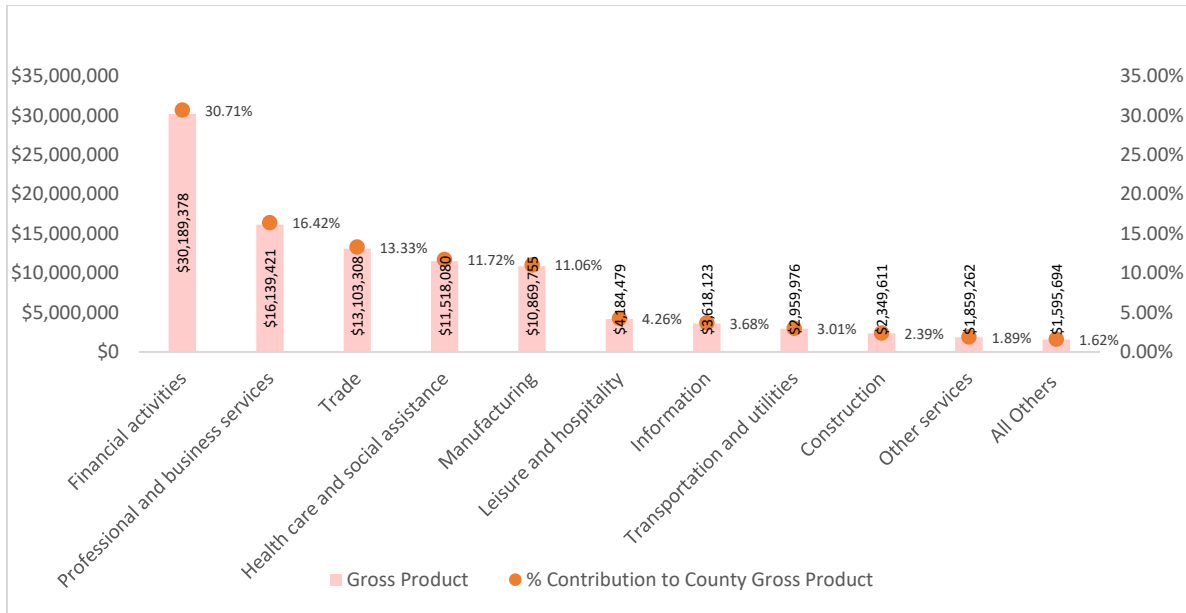
slightly below the average contribution of 4.2% observed between 2015 and 2019. These statistics highlight the pivotal role played by the leisure and hospitality sector in Cuyahoga County's economy. While it has shown resilience and a rebound in output, progress must be made to reach pre-pandemic levels and regain its significant contribution to the County's GDP.

Figure 4. Contribution of Arts, Leisure & Hospitality to Cuyahoga County GDP (\$1,000s) & Percentage of Total GDP



As indicated in Figure 5, the leisure and hospitality sector has emerged as a significant contributor to the County's economic growth, showcasing its robust potential. With a remarkable contribution of 4.18 billion dollars to the County's gross product, it commands a noteworthy 4.26% share of the total private gross product. While it holds the fifth position in gross product contribution, trailing behind the financial activities, professional and business services, trade, health care and social assistance, and manufacturing sectors, its significance cannot be understated. This sector is crucial in providing employment opportunities, attracting tourists, and fostering a vibrant local culture, making it an indispensable component of the County's economic landscape.

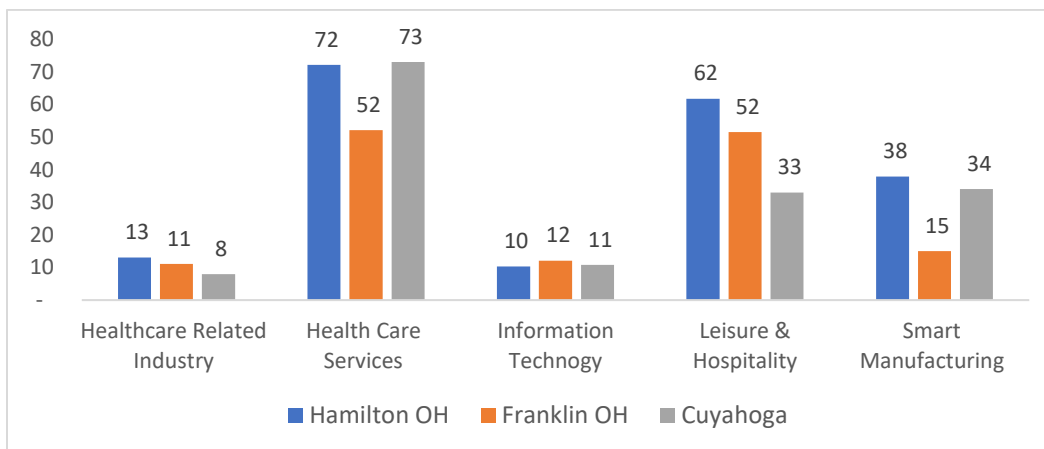
Figure 5. Contribution to Private Gross County Product by Industry



1.3. Employment Trends

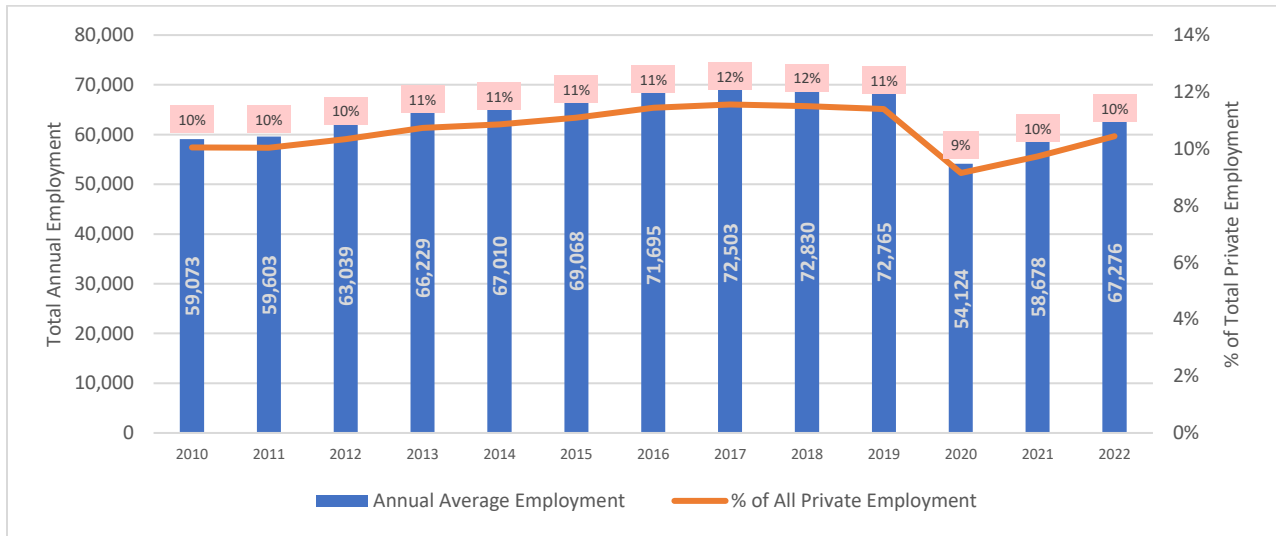
Regarding employment in the leisure and hospitality sector, Cuyahoga County lags behind its counterparts, Hamilton and Franklin counties, as presented in Figure 6. The statistics reveal a noticeable disparity, as Hamilton County employs 62 workers in this sector per 1,000 population, while Franklin County employs 52. In contrast, Cuyahoga County falls behind with only 33 workers per 1,000 population. This discrepancy highlights the differing priorities and dynamics within these counties. However, it's worth noting that Cuyahoga County still holds its own in other sectors. The one area where Hamilton and Franklin counties surpass Cuyahoga County is in healthcare-related industries. Nevertheless, these variations in employment distribution across the counties demonstrate the region's diverse economic landscapes and opportunities.

Figure 6. Average Employment Per 1,000 Population: Cuyahoga vs. Ohio Counties (2010 - 2022)



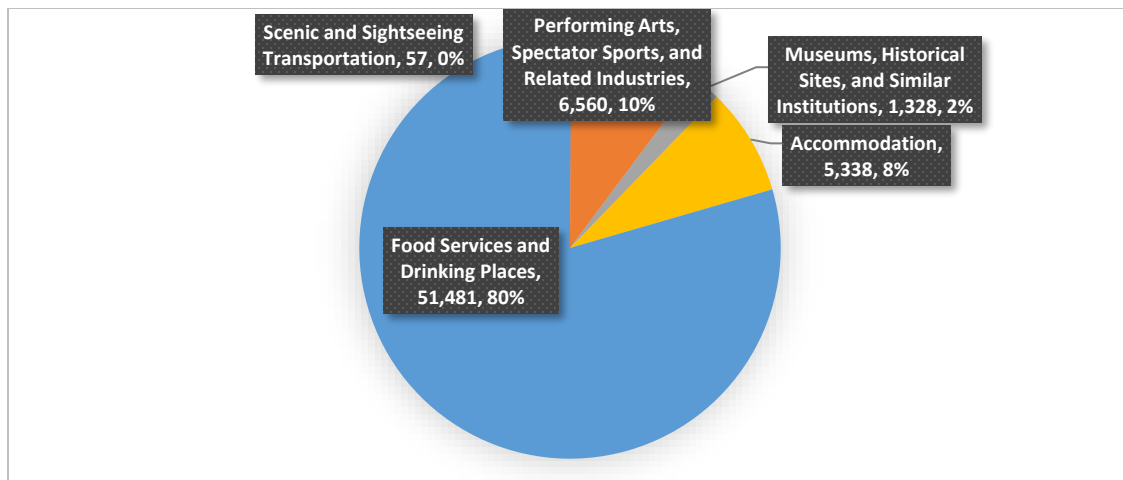
As mentioned earlier, the leisure and hospitality sector significantly contributes to employment in Cuyahoga County, accounting for 10% of all jobs. As depicted in Figure 7, 2019, this sector employed 72,765 people, constituting 11% of the total employment. Between 2010 and 2019, the sector experienced a compound annual growth rate (CAGR) of 2.3%. However, due to the impact of the COVID-19 pandemic, there was a significant decline of -2.5% in employment from 2019 to 2020 because of shutdowns and restrictions. Although the industry has been recovering since 2021, it has not yet reached pre-pandemic growth levels. Considering a CAGR of 2.3%, one would have expected the total employment in the leisure and hospitality sector to reach around 78,000 in Cuyahoga County. However, the sector employed 64,344 people in 2022 due to the slow recovery.

Figure 7. Cuyahoga County Leisure & Hospitality Sector Historical Employment Trends



Most of the leisure and hospitality employment in the County (80%) can be attributed to jobs in food and drinking establishments, followed by employment in performing arts and spectator sports (10%), accommodation (8%), museums and historical sites (2%), and scenic and sightseeing transportation (<1%), as shown in Figure 8.

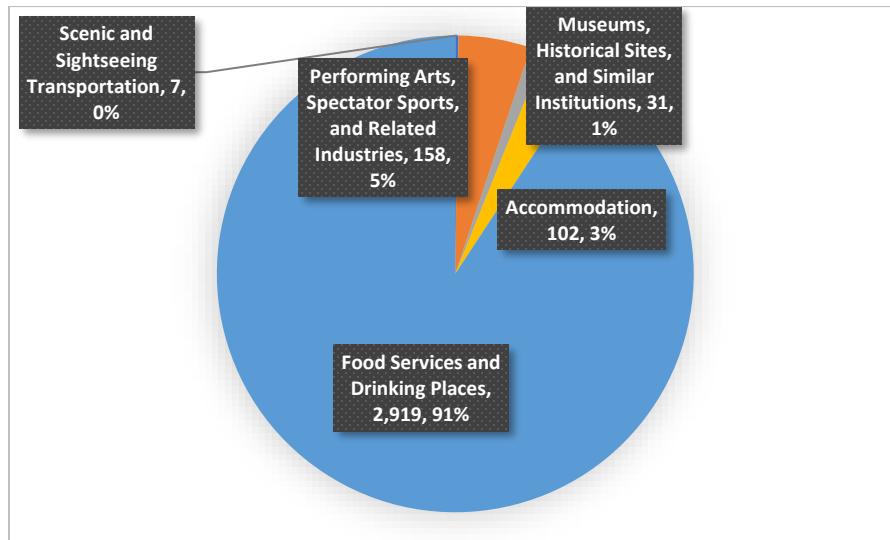
Figure 8. Employment by Cuyahoga County's Leisure and Hospitality Subsector



1.4. Number of Establishments

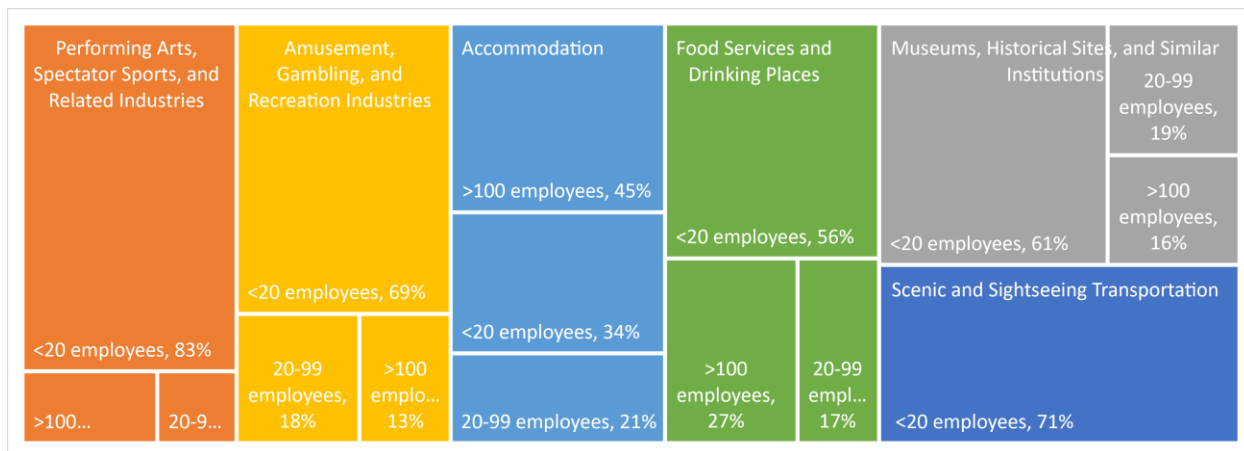
When it comes to establishments, the number of leisure and hospitality sector establishments consistently increased from 2010 to 2019, with a slight decline of twelve establishments (representing a -0.33% decrease) in 2020. Unlike employment, the growth in leisure and hospitality establishments seems to be back on track. Figure 9 indicates that 91% of all establishments in the leisure and hospitality sector are food and drinking places.

Figure 9. Establishments by Leisure & Hospitality Subsector



Another principal factor to consider in policy proposals that may impact the industry is the size of the establishments. Figure 10 reveals that most establishments are small-scale for each subsector, employing fewer than twenty people. The performing arts sector has the highest proportion, with 83% of all establishments employing less than 20 workers. This is followed by scenic and sightseeing transportation (71.4%), amusement and gambling institutions (69%), museums and historical sites (61.2%), food and drinking places (55.9%), and accommodation (33.6%) subsectors, respectively.

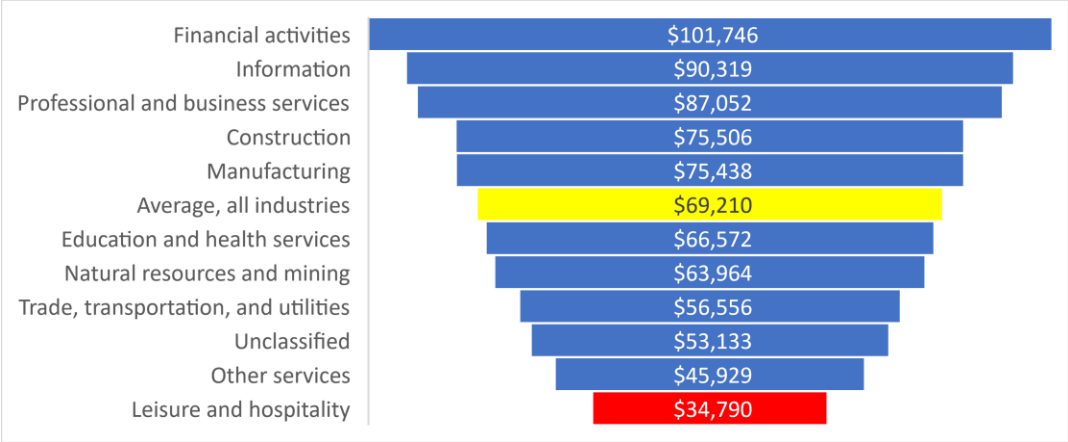
Figure 10. Percentage of Establishment by Employment Size and Subsector



1.5. Annual Wages

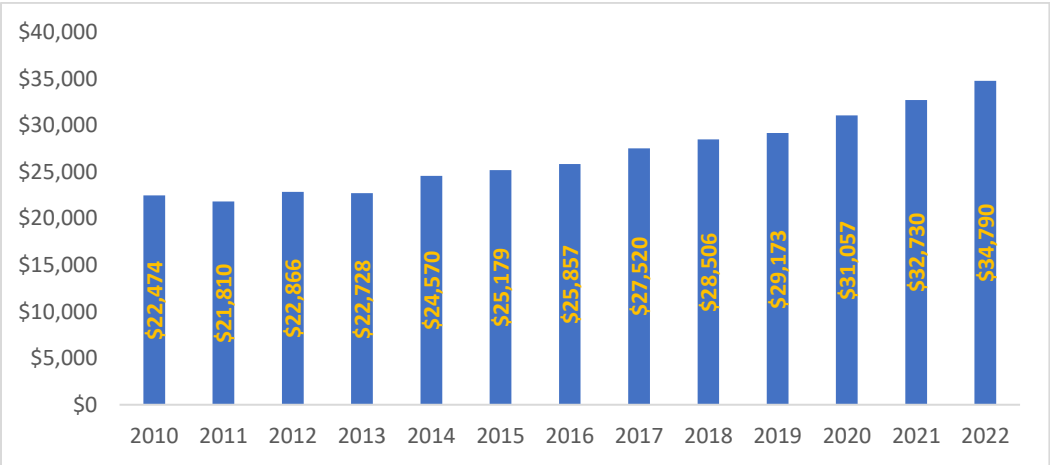
The leisure and hospital paid direct annual wages and benefits of \$2.25 billion in 2022 and accounting for 5.2% of all wages and benefits paid to Cuyahoga County private workers, despite accounting for 10% of all private employment in the County, thus, underscoring the fact that the sector is comparatively lower paid (See Figure 11). This is proven through the industry comparison of average wages. Figure 11 confirms that compared to other sectors, the leisure and hospitality sector, with an annual average salary of \$34,790, is the lowest-paid sector in the County.

Figure 11. Industry-Level Average Annual Wage Comparison for Cuyahoga County



Despite being the lowest-paid sector in Cuyahoga County, the leisure and hospitality industry has shown positive growth in average annual wages. Remarkably, even during the pandemic, the sector experienced a consistent wage increase from 2010 to 2022 (see Figure 12). Over this period, the average annual wage in the sector displayed a compound annual growth rate of 3.7%. This upward wage trend signifies an improvement in the industry's compensation structure and highlights the sector's resilience and potential for advancement. While challenges persist, such as the need for higher wages and improved working conditions, consistent wage growth highlights a positive trajectory for the employees in the leisure and hospitality sector in Cuyahoga County.

Figure 12. Annual Average Pay: Cuyahoga County Leisure and Hospitality Sector

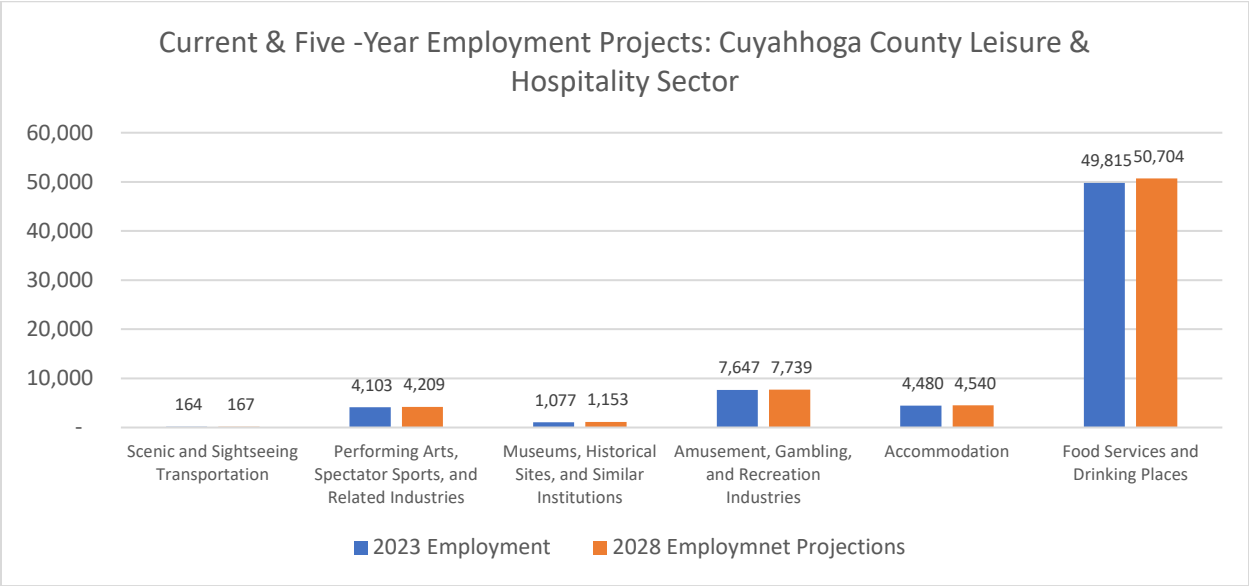


1.6. Industry Forecasts

According to the Bureau of Labor Statistics (BLS) projections, the U.S. leisure and hospitality sector is anticipated to witness the highest employment growth rate among all industries from 2021 to 2031. The BLS estimates an annual compound growth of 1.3% for this sector during the ten years. The mining, educational services, and healthcare and social services sectors are closely behind, projected to experience a 1.2% growth rate for the same period.

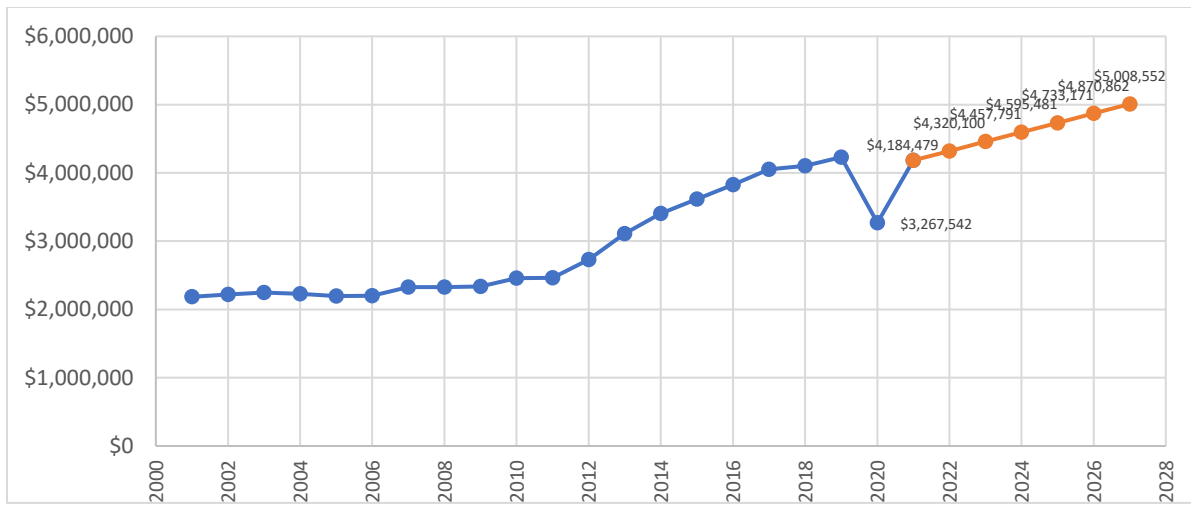
If the projected employment growth materializes uniformly across the country, we can anticipate that by 2031, Cuyahoga County's leisure and hospitality sector will employ approximately 73,215 individuals. This would represent a 1.3% increase from the employment levels recorded in 2022. These projections highlight the potential for continued growth and expansion within the leisure and hospitality industry in Cuyahoga County, aligning with the national trend of robust employment growth in this sector. This employment growth, if uniformly applied to the leisure and hospitality subsectors, will bump employment in food and drinking places to 50,704, amusement, gambling, and recreation places to 7,739, museums, historical places, zoos, and parks to 1,153, performing arts, and spectator sports to 4,209, and scenic and sightseeing transportation to 167 by 2028 (See Figure 13).

Figure 13. Current & Five-Year Employment Projects: Cuyahoga County Leisure & Hospitality Sector



In terms of output, recent estimates reveal that the leisure and hospitality industry contributed \$4.18 billion to the gross output of the County. If the current growth rates remain consistent, our projections suggest that the gross output for the industry will exceed \$5 billion by the year 2028 (refer to Figure 14). These estimations indicate a positive trajectory for the industry's economic contribution to the County, reflecting potential expansion and increased economic output in the coming years.

Figure 14. Leisure & Hospitality Output & Projections (\$1,000s): Cuyahoga County



2. ECONOMIC IMPACT ANALYSIS

2.1. Introduction to Impact Analysis

This part of our analysis focuses on assessing the economic impact of the leisure and hospitality industry in Cuyahoga County. To accomplish this, we employ the IMPLAN program input/output (IO) models, which utilize a matrix representation of the regional economy. By leveraging input/output analysis, we can quantify the inter-industry relationships and predict the effects of changes in the leisure and hospitality sector. This methodology is valuable for understanding the sector's influence on the regional economy, considering direct, induced, and indirect effects.

2.2. Methodology Employed for the Economic Impact Analysis

IMPLAN Input/Output Model Overview: The IMPLAN IO modeling system is based on the work of Nobel Prize winner Wassily Leontief and is designed to capture the interconnectedness of industries, households, and government through buy-sell relationships. This allows us to understand how economic activities support additional economic activity. Using annual, region-specific data, IMPLAN maps these relationships, enabling predictions of economic changes' impacts on a regional economy. The IO model is enhanced by incorporating regional-specific Social Accounting Matrices and Multiplier Models, providing accuracy and adaptability.

Data Collection and Usage: For this study, we utilized data from the BLS's Quarterly Census of Employment and Wages (QCEW) program to obtain the annualized total employment data for the leisure and hospitality sector in the County. The data specifically corresponds to the 2022 annualized employment data. The QCEW program publishes a quarterly count of employment and wages reported by employers, covering a substantial portion of U.S. jobs, with data available at the County, Metropolitan Statistical Area (MSA), state, and national levels, categorized by industry. We utilized IMPLAN's extensive database, which includes County, state, zip code, and federal economic statistics specialized by region. These data sources measure changes or event effects on the regional or local economy. The data coverage provided by IMPLAN's study areas ensures comprehensive and detailed information, while the flexibility to incorporate user-supplied data allows for customization. For this study, we focused on defining the cities and areas within Cuyahoga County as our study area. For data input into IMPLAN, the employment data related to Cuyahoga County's leisure and hospitality sector was analyzed in detail. The initial 67,287 jobs associated with this sector were further divided into sub-sectors, and the breakdown is provided in Table 1. This disaggregation offers a more granular understanding of the distribution of employment within the leisure and hospitality sector of Cuyahoga County.

Table 1. Subsector Disaggregating 2022 Cuyahoga County Employment in the Hospitality and Leisure Sector

Main Sector Code	Sector Description	Employment	Wages	# of Establishments
487	Scenic and sightseeing transportation	164	\$4,834,616	6
71	Arts, entertainment, and recreation	12,828	\$951,141,736	525
	NAICS 711 Performing arts and spectator sports	4,103	\$666,712,008	193
	NAICS 712 Museums, historical sites, zoos, and parks	1,077	\$55,435,684	28
	NAICS 713 Amusements, gambling, and recreation	7,647	\$228,994,044	304
721	Accommodation	4,480	\$154,890,508	160
	NAICS 7211 Traveler accommodation	4,381	\$151,561,288	154
	NAICS 721110 Hotels (except casino hotels) and motels	4,087	\$137,971,824	145
	NAICS 72119 Other traveler accommodation	294	\$13,589,464	9
722	Food services and drinking places	49,815	\$1,237,170,020	3,020
	NAICS 7223 Special food services	4,168	\$136,583,576	243
	NAICS 7224 Drinking places, alcoholic beverages	2,451	\$61,763,580	272
	NAICS 722511 Full-service restaurants	21,599	\$610,559,796	979
	NAICS 722513 Limited-service restaurants	17,439	\$344,268,040	1,234
	NAICS 722514 Cafeterias, grill buffets, and buffets	128	\$3,736,032	15
	NAICS 722515 Snack and nonalcoholic beverage bars	4,029	\$80,258,996	277
	Total	67,287	\$2,348,036,880	3,711

Construction of the Regional Input/Output Model: The construction of the regional input/output model involved utilizing IMPLAN's software version 6.9, which performs calculations and offers a user-friendly interface for making final demand changes. By incorporating data from IMPLAN's databases, we created a regional IMPLAN model tailored to Cuyahoga County's leisure and hospitality sector. This model represents the interdependencies between industries and captures the sector's contributions to the regional economy.

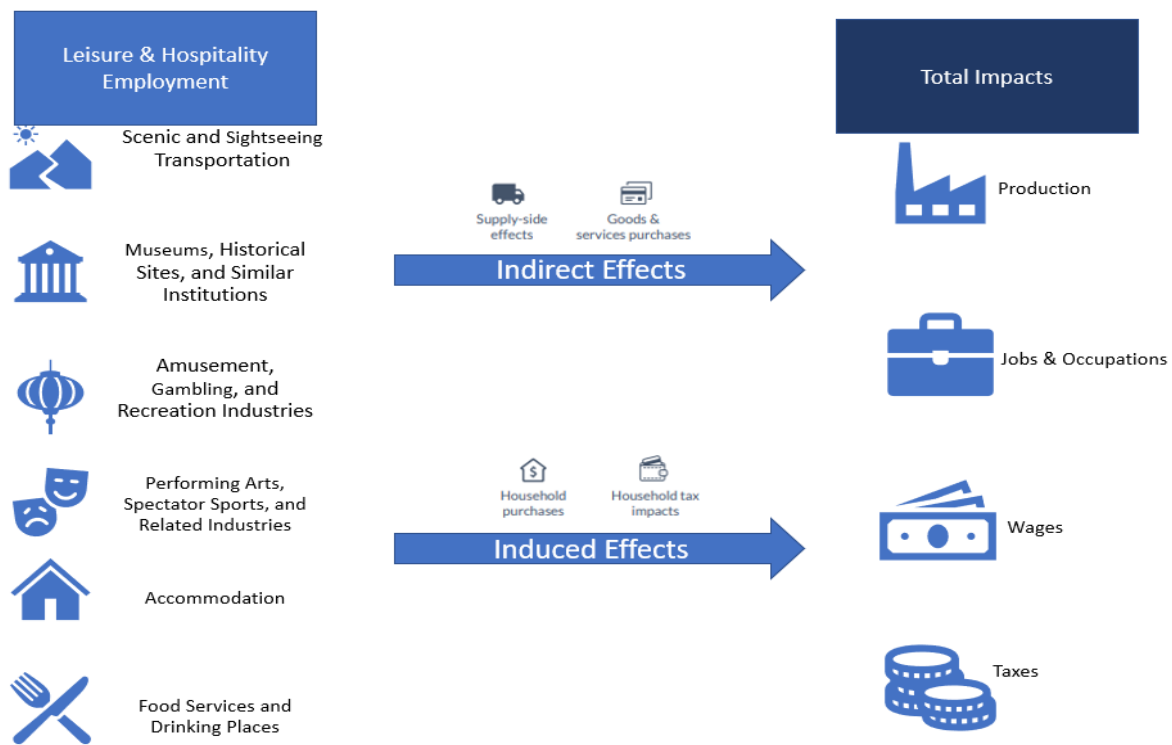
Economic Impact Analysis: With the regional input/output model in place, we conducted an economic impact analysis specific to Cuyahoga County's leisure and hospitality industry. This analysis aimed to quantify and demonstrate the economic implications and contributions of the sector within the region. We assessed the sector's influence on key indicators such as employment, industry output, value-added, and institutional demands by considering direct, induced, and indirect effects. All reported impacts are presented in 2023 dollars.

Conclusion: Using IMPLAN's input/output model tailored to the leisure and hospitality industry in Cuyahoga County allowed us to assess the sector's economic impact accurately. We gained insights into the sector's contributions to the regional economy by mapping the inter-industry relationships and considering various economic effects. The findings from this study provide a comprehensive understanding of the sector's economic implications within the chosen region and can inform decision-making processes related to economic planning and development.

Economic impacts are made up of direct, indirect, and induced effects. See Figure 15 for a depiction of the economic impact relationships. The following are suggested assumptions for accepting the impact model:

- IMPLAN input-output is a production-based model.
- Employment numbers from the BLS's Quarterly Census of Employment and Wages (QCEW) program provide several data files. These files are available for download. Data is classified using the North American Industry Classification System (NAICS).
- Assumptions need to be made concerning the nature of the local economy before impacts can be interpreted.
- The IMPLAN model used was constructed for the year 2022 (most recent data available).

Figure 15. Direct, Indirect, and Induced Impacts of the Leisure and Hospitality Sector



2.3. Economic Impact Analysis Results

This section presents the key findings and results of the economic impact assessment conducted on Cuyahoga County's leisure and hospitality sector. The analysis aimed to evaluate the industry's economic significance and contributions to the County's economy. The report provides a comprehensive understanding of the sector's economic impact by examining various indicators and measurements, including employment, income, Output, and multiplier effects. Additionally, the results shed light on the sector's role in generating tax revenue, stimulating other industries, and supporting overall economic growth within Cuyahoga County. The findings presented here serve as a valuable resource for policymakers, industry stakeholders, and community leaders to

make informed decisions and allocate resources effectively for the continued development and prosperity of the leisure and hospitality sector in the County.

2.3.1. Overall Impact Summary

Table 2 provides an overview of the Value Added, Output, and Employment impacts of the leisure and hospitality-related industry on Cuyahoga County's economy. The Value-Added total measure demonstrates that spending associated with leisure and hospitality contributed approximately \$6.86 billion in wages, rents, and profits to the County. This includes the direct value of wages, inter-industry spending, and any additional household spending resulting from these sources.

Table 2. Total Impact Summary

Impact	Employment	Labor Income	Value Added	Output
Direct	67,276	\$2,505,378,333	\$4,123,410,703	\$6,757,223,893
Indirect	12,239	\$941,199,530	\$1,612,329,110	\$2,591,648,193
Induced	10,886	\$650,569,718	\$1,120,633,526	\$1,856,267,368
Total	90,401	\$4,097,147,580	\$6,856,373,339	\$11,205,139,453

The leisure and hospitality sector has substantially impacted the regional economy of Cuyahoga County. Regarding output, leisure and hospitality-related spending has generated nearly \$11 billion in local production within the region. This includes the direct value of local production, inter-industry transactions, and additional household spending resulting from inter-industry production. The total output impact of the sector is estimated at \$11,205,139,452, with a direct output impact of \$6,757,223,892 and an indirect output impact of \$2,591,648,192. The induced output impact, arising from the spending of direct and indirect employees, contributes \$1,856,267,367 to the overall output impact.

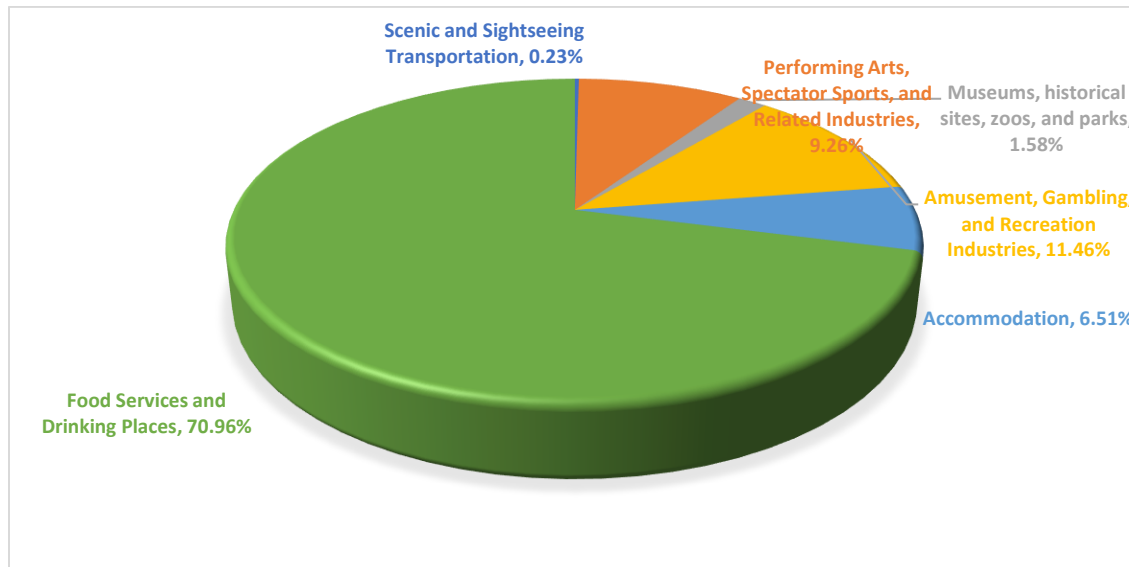
Furthermore, the leisure and hospitality sector has provided significant employment opportunities. It directly employs over 67,276 individuals, including those in temporary or part-time positions. Additionally, there is an indirect employment impact, creating 12,239 jobs through the sector's supply chain and business-to-business transactions. The induced employment impact supports an additional 10,886 jobs in the wider economy. The total employment impact of the sector is estimated at 90,401 jobs, encompassing both direct employment within the industry and jobs dependent on the sector.

2.3.2. Sub-Sector Impacts

Policymakers and development partners need to comprehend the employment implications of the leisure and hospitality sector, with a specific focus on its sub-sectors. In the context of Cuyahoga County, Figure 16 reveals that out of the total 90,401 jobs generated by the direct, indirect, and induced impacts of the County's leisure and hospitality sector, 71% can be attributed to the Food and drinking places sub-sector. The amusement, gambling, and recreational sub-sector contribute 11.5% of the employment impact, while the performing arts and spectator sports sub-sector account for 9.3%. The accommodation sub-sector, museums, historical sites, parks, zoos sub-

sector, and scenic sightseeing transportation sub-sector account for 6.5%, 1.6%, and 0.2% of the jobs, respectively. This data is crucial for understanding the overall employment effects of the industry and shaping effective policies.

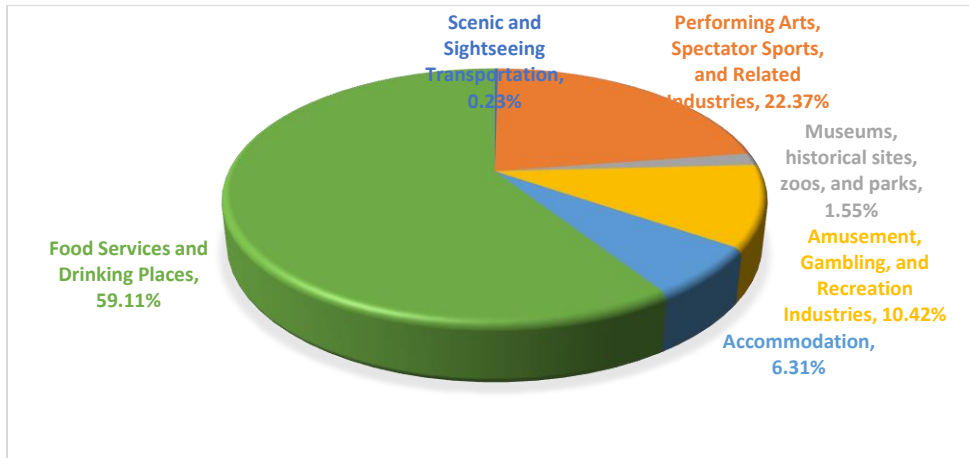
Figure 16. Employment Impact by LH Sub-sector



Regarding labor income, the direct employment impact of 67,276 individuals in the leisure and hospitality sector contributes to a direct labor income impact of \$2.5 billion, including wages, salaries, and other forms of compensation. The sector also has an indirect labor income impact of \$941,199,530, benefiting employees in supporting industries. The induced labor income impact, resulting from the spending of direct and indirect employees, amounts to \$650,569,717. The total labor income impact of the sector is estimated at \$4,097,147,580.

As depicted in Figure 17, the total impact of labor income amounts to \$4,097,147,580. This figure can be further broken down as follows: food and drinking places contribute 59%, the performing arts and spectator sports subsector contribute 22%, the accommodation sub-sector contributes 10%, and the remaining 6.31% is attributed to other sectors. The performing arts and spectator sports subsector also contribute 1.55% and 0.2%, respectively. While the performing arts and spectator sports subsector ranks as the second largest in employment impact, its significance becomes even more evident when considering labor income. After food and drinking places, the performing arts and spectator sports subsector emerge as the second-largest contributor to labor income.

Figure 17. Labor Income Impact by Sub-Sector

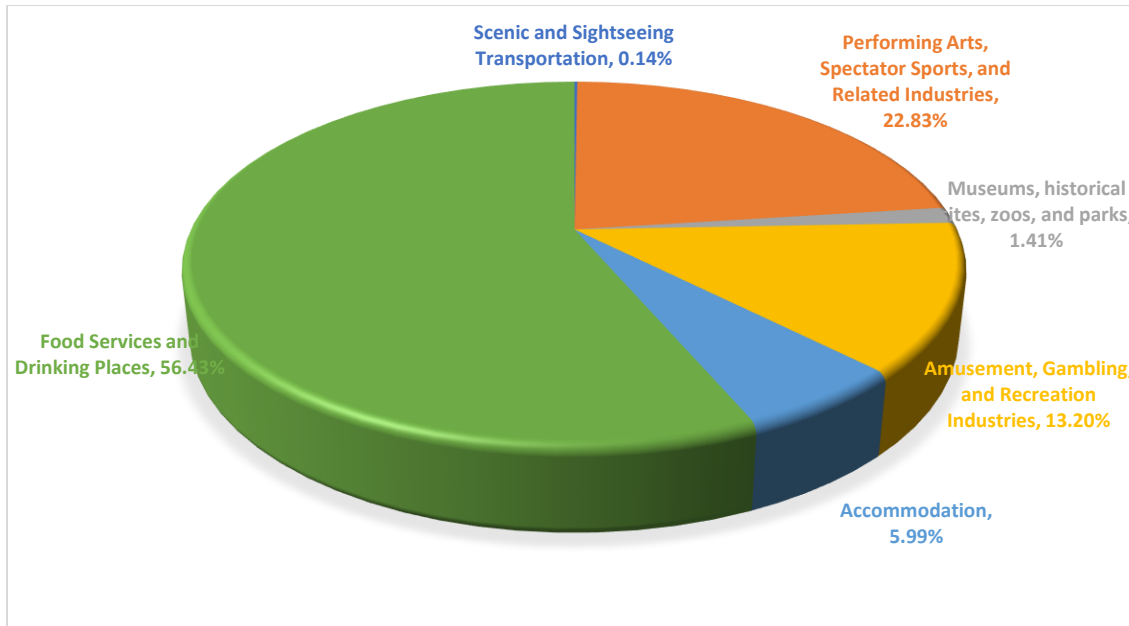


Value-added impact represents the net contribution of an industry to an economy, calculated as the difference between Output and the cost of Intermediate Inputs over a specified period. It is a crucial indicator of an industry's contribution to a region's Gross Domestic Product (GDP). In the case of Cuyahoga County, the leisure and hospitality sectors play a significant role in bolstering the Gross Regional Product (GRP).

The direct value-added impact of the leisure and hospitality sector, which reflects the value created directly by its activities, is estimated at \$4,123,410,702. A value-added indirect effect also results from supply chain and inter-industry transactions, amounting to \$1,612,329,110. The induced value-added impact, arising from the spending of both direct and indirect employees, contributes \$1,120,635,525. In total, the value-added impact of the sector is calculated at \$6,856,373,338.

As demonstrated in Figure 18, the food and drinking places sub-sector has the largest value-added impact, accounting for approximately 56% of the total. The performing arts and spectator sports subsector follow, contributing 23% of the value-added impact. The amusement, gambling, and recreational sub-sector hold a 13% share. At the same time, the accommodation, museums, historical sites, zoos, and scenic sightseeing transportation sub-sectors contribute 6%, 1.4%, and 0.14%, respectively, to the overall value-added impact. These figures emphasize the sector's significant role in bolstering the regional economy through value-added contributions.

Figure 18. Value Added Impact by Sub-Sector

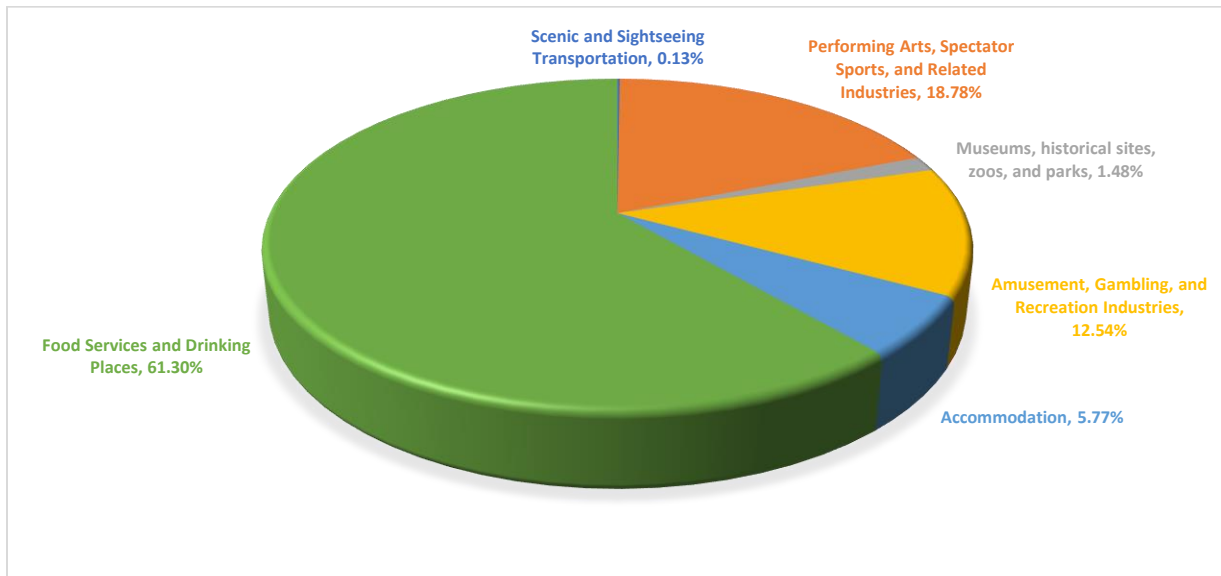


The total output impact of an industry measures the value of its production, and there are two ways to gauge it: from the sales and expenditures perspectives. When we consider the sales perspective, we add up the sales to final users in the economy (GDP), sales to other industries (Intermediate Inputs), and inventory change to calculate the output. From the expenditures perspective, output is determined by summing up an industry's Value Added and Intermediate Inputs. Output is a measure of the overall value of all the goods produced.

Value Added, on the other hand, is a subset of output and serves as a valuable metric to assess the wealth created by an economy. Industries purchase goods and services from other industries. Through their manufacturing process, they create a final product with a higher value (Output) than the initial goods that went into it (Intermediate Inputs). The increase in value is the value the producer adds to the inputs due to the production process. This added value is then utilized to pay for labor and taxes, hoping to generate some profit. In the case of Cuyahoga County, the total output impact of the leisure and hospitality sector is estimated to be around \$11,205,139,453. This figure comprises direct, indirect, and induced impacts, amounting to \$6.8 billion, \$2.6 billion, and \$1.9 billion, respectively. Based on the discussions above, we can conclude that the sub-sector with the highest overall impact is the food and drinking places, contributing to about 61%.

As shown in Figure 19, the top three sub-sectors that significantly contribute to the output are food and drinking places (61%), performing arts and spectator sports (19%), and amusement, gambling, and recreation (12.545%). Following closely are accommodation (6%), museums, historical places, zoos, and parks (1.48%), and scenic and sightseeing transportation (0.13%). These findings underscore the vital role of the leisure and hospitality sector in Cuyahoga County's economy, contributing to employment, income generation, and overall economic activity.

Figure 19. Overall Output Impact by Sub-Sector



The finding that the food and drinking places sub-sector hold the most substantial economic impact within the leisure and hospitality sector necessitates a more detailed examination of its effects. To provide a comprehensive picture of this sub-sector for the County's policymakers and development partners, let us delve into the data presented in Table 3.

Table 3. Impact Breakdown for Food and Drinking Places

Category	Employment	Labor Income	Value Added	Output
Total	65,754	\$ 2,630,476,038	\$ 4,165,521,848	\$ 7,512,929,839
Special food services	5,351	\$ 232,379,058	\$ 330,801,015	\$ 527,580,186
Drinking places, alcoholic beverages	3,147	\$ 136,650,929	\$ 194,528,140	\$ 310,244,490
Full-service restaurants	27,919	\$ 1,132,127,841	\$ 1,758,549,800	\$ 3,046,232,406
Limited-service restaurants	24,001	\$ 897,552,438	\$ 1,551,714,914	\$ 3,102,684,937
Cafeterias, grill buffets, and buffets	164	\$ 7,136,401	\$ 10,158,956	\$ 16,202,079
Snack and nonalcoholic beverage bars	5,173	\$ 224,629,372	\$ 319,769,023	\$ 509,985,741

Within the food and drinking places sub-sector, a total of 65,754 jobs are attributed to its impact. The top three contributing sub-sectors to this employment impact are full-service restaurants with 27,919 jobs (42.46%), followed by limited-service restaurants with 24,001 jobs (36.50%), and special food services with 5,351 jobs (8.14%). Additionally, snack and nonalcoholic beverage bars account for 5,173 jobs (7.87%), drinking places serving alcoholic beverages contribute 3,147 jobs (4.79%), and cafeterias, grill buffets, and buffets employ 164 individuals (0.25%).

When considering the total labor income impact of \$2.63 billion within the food and drinking places sub-sector, the top three contributing sub-sectors are full-service restaurants with \$1.13 billion (43.46%), limited-service restaurants with \$897.6 million (34.12%), and special food services with \$232.4 million (8.83%). Following closely are snack and nonalcoholic beverage bars

with \$224.63 million (8.54%), drinking places serving alcoholic beverages with \$136.7 million (5.19%), and cafeterias, grill buffets, and buffets with \$7.14 million (0.27%).

The total value-added impact of the food and drinking subsector is \$4.17 billion. The top three contributing sub-sectors are full-service restaurants with \$1.8 billion (42.22%), limited-service restaurants with \$1.55 billion (37.25%), and special food services with \$330.8 million (7.94%). The subsequent sub-sectors include snack and nonalcoholic beverage bars with \$319.8 million (7.94%), drinking places serving alcoholic beverages with \$194.5 million (4.67%), and cafeterias, grill buffets, and buffets with \$10.2 million (0.24%).

The estimated total output impact of Cuyahoga County's food and drinking places is an impressive \$7.5 billion. The top three contributing subsectors to this output impact are limited-service restaurants with \$3.1 billion (41.3%), full-service restaurants with \$3.05 billion (40.55%), and special food services with \$527.6 million (7.02%). The remaining sub-sectors are snack and nonalcoholic beverage bars with \$510 million (7.02%), drinking places serving alcoholic beverages with \$310.24 million (4.13%), and cafeterias, grill buffets, and buffets with \$16.2 million (0.22%).

It's important to note that analysts often emphasize output due to its size, surpassing Value Added. However, relying solely on output to measure aggregate production may lead to double counting, as it involves output from other industries. This issue of double counting could be most prominent for limited-service restaurants, potentially explaining why, despite full-service restaurants having the largest employment, labor income, and value-added, limited-service restaurants show the highest total output impact.

2.3.4. Fiscal Impact

In conducting an economic impact analysis of the leisure and hospitality sector, it is critical for the analyst to include fiscal impact estimates beyond the traditional economic indicators, such as jobs and output, to be able to shed light on how the sector affects government revenues. Presenting fiscal impact estimates aids policymakers and development partners in making informed decisions relative to the contributions, sustainability, and long-term implications of the activities of the sector. Understanding the fiscal impacts helps evaluate whether the economic activity's benefits outweigh the associated costs and whether public resources are being utilized effectively. It also aids in crafting appropriate policies and strategies to optimize economic growth while maintaining fiscal stability and ensuring the community's overall well-being.

2.3.4.1. Overall Fiscal Impact Summary

According to the data presented in Table 4, the leisure and hospitality sector makes a significant fiscal contribution at the County, sub-county, state, and federal levels. The sector contributes \$708,248,094 in federal taxes, \$64,391,298 in state taxes, \$33,031,214 in county taxes, \$94,079,649 in special district taxes, and \$68,477,692 in other sub-county (city) areas. These figures highlight the substantial tax impact of the leisure and hospitality sector on the economy of Cuyahoga County, the state of Ohio, and the nation.

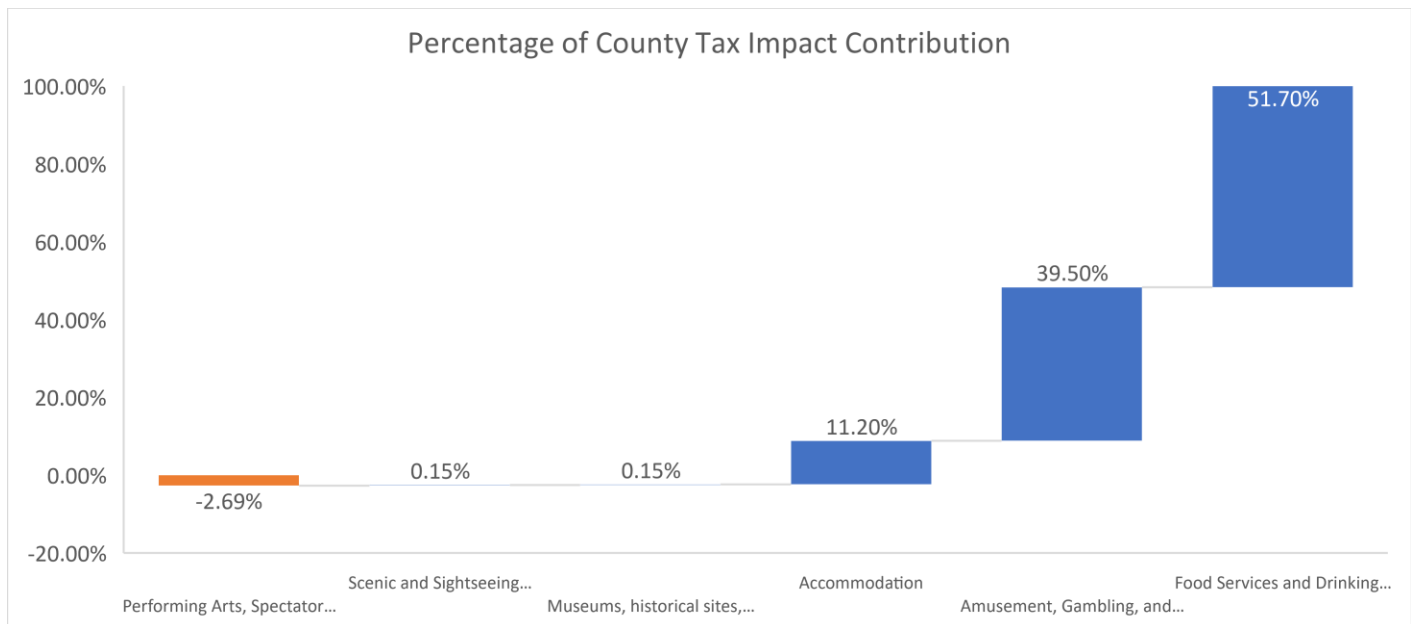
Table 4. Overall Fiscal Impact Summary

Impact	Sub County General	Sub County Special District	County	State	Federal
Direct	\$36,677,208	\$34,862,043	\$12,302,563	\$74,403,681	\$445,902,525
Indirect	\$18,156,141	\$31,566,058	\$11,055,570	\$49,317,360	\$157,269,010
Induced	\$13,644,344	\$27,651,549	\$9,673,082	\$40,670,258	\$105,076,560
Total	\$68,477,693	\$94,079,650	\$33,031,214	\$164,391,299	\$708,248,094

2.3.4.2. County-Level Fiscal Contribution by Sub-Sector

To facilitate targeted policymaking, policymakers must understand the fiscal contributions of various sub-sectors within the leisure and hospitality industry. Figure 20 provides valuable insights for Cuyahoga County, highlighting the top three sub-sector contributors to the County's fiscal impact from the leisure and hospitality sector. These key players are the food and drinking places sub-sector, accounting for 51.7% of the total county fiscal impact, followed by the amusement and gambling sub-sector at 39.5%, and the accommodation sub-sector at 11.2% of the \$33 million leisure and hospitality sector county fiscal impact. Additionally, the museums, historical places, zoos, and parks sub-sector, as well as the scenic and sightseeing transportation sub-sectors, also play significant roles. It is worth noting that the performing arts and spectator sports sub-sector shows a -2.69% county fiscal contribution, indicating the subsidies this sector receives. This valuable information aids policy makers in making well-informed decisions to support and optimize the economic impact of the leisure and hospitality industry.

Figure 20. County-Level Fiscal Contribution by Sub-Sector

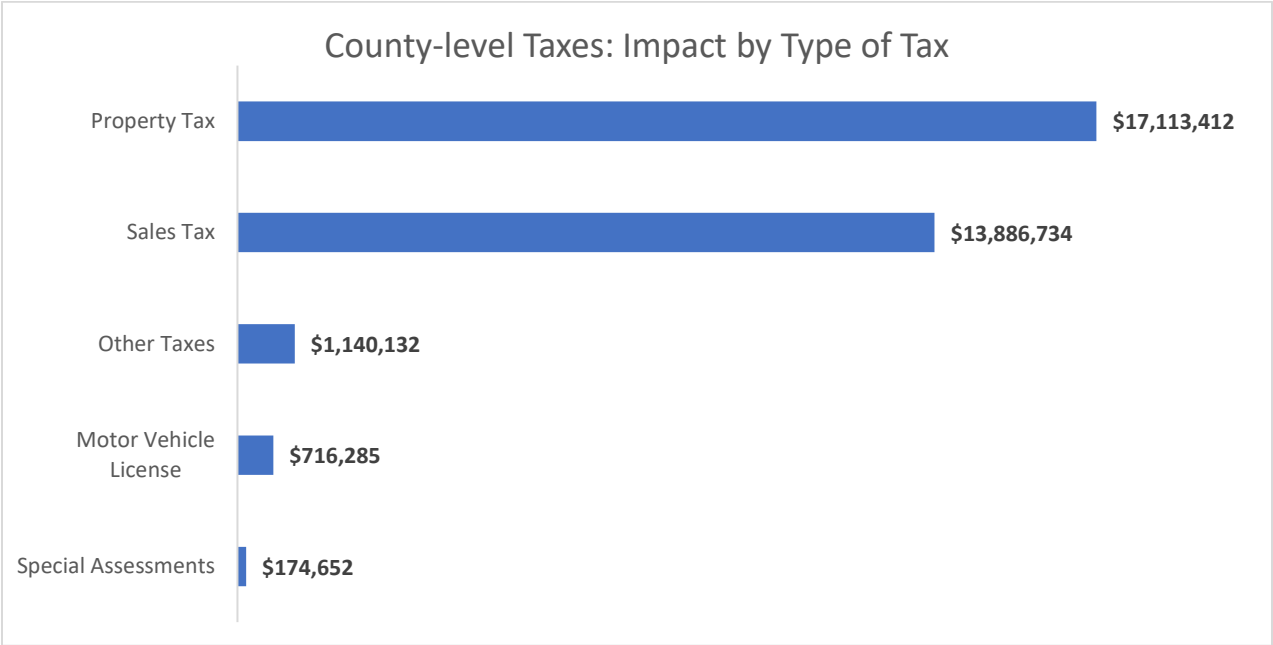


2.3.4.3. County-Level Taxes: Impact by Type of Tax

To provide policymakers and development partners with a more detailed understanding of the \$33 million in county fiscal impact, let's delve into the breakdown of the types of taxes involved, as

presented in Figure 21. The largest portion of this county tax impact comes from property taxes, accounting for \$17.1 million.

Figure 21. County-Level Taxes: Impact by Type of Tax



Following closely is the revenue generated from sales tax, contributing \$13.9 million. Motor vehicle licenses also make a notable impact, amounting to \$716.3 thousand. Additionally, special assessments contribute \$174,652, and other taxes contribute \$1.14 million to the overall county fiscal impact of the leisure and hospitality sector. This comprehensive breakdown allows for a clearer assessment of how the sector's fiscal contributions are distributed across various tax categories, aiding policymakers in making informed decisions and effectively managing resources.

2.4. Impact by Industry

In Figure 22, we can see the top 15 industries that are influenced by the leisure and hospitality sector activities in terms of total output. Notably, the top three industries are all from the leisure and hospitality sectors. However, it's interesting to observe that the real estate and professional, scientific, and technical services sectors also feature among the top five impacted industries.

Figure 22. Output Impact: Top 15 Industries Impacted by the LH Employment

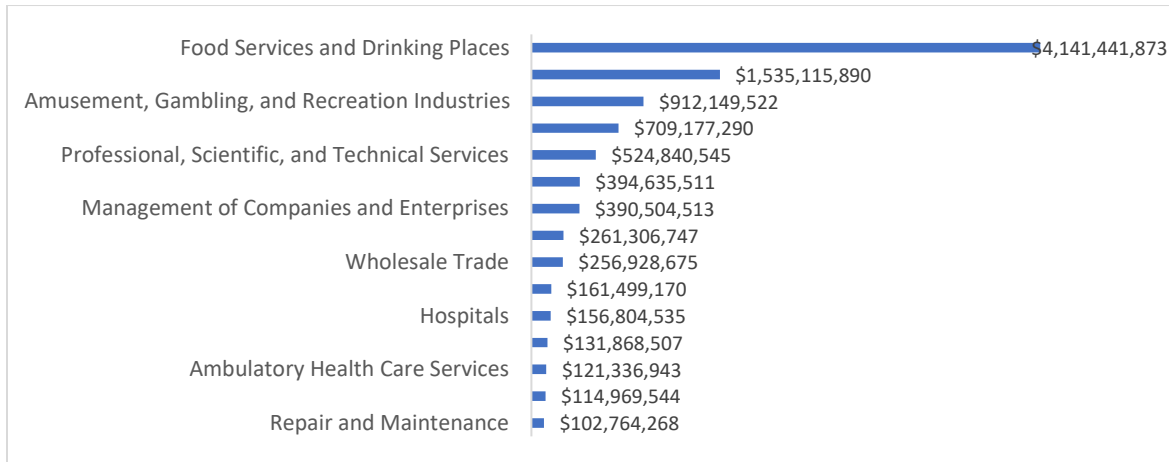


Figure 23 highlights the top 15 industries affected by the activities of the leisure and hospitality sector in terms of employment. Unsurprisingly, the top four industries impacted are all sub-sectors of the leisure and hospitality sector itself. Interestingly, the professional, scientific, and technical services sectors follow closely, securing a place in the top five industries with 2,702 jobs. This data solidifies the significant impact that the leisure and hospitality sector have on the professional, scientific, and technical services sector, underscoring the magnitude of its influence on employment in that industry and bolstering the significance of the impact of the leisure and hospitality activities output on this industry.

Figure 23. Employment Impact: Top 15 Industries Impacted by the LH Employment



It's worth noting that the professional, scientific, and technical services sector encompasses the subsectors presented in Table 5, providing a more detailed view of the sectors influenced by the leisure and hospitality industry. This data sheds light on the far-reaching effects of the leisure and hospitality sector, impacting various industries and contributing significantly to the broader economy.

Table 5. Breakdown of the Professional, Scientific, and Technical Services Sector

NAICS Cod	Sector Description
5411	Legal Services
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services
5413	Architectural, Engineering, and Related Services
5414	Specialized Design Services
5415	Computer Systems Design and Related Services
5416	Management, Scientific, and Technical Consulting Services
5417	Scientific Research and Development Services
5418	Advertising and Related Services
5419	Other Professional, Scientific, and Technical Services

2.5. Value Added Analysis

The value-added impact can be disaggregated labor income, which can be further divided into employee compensation, proprietor income, and other property income.

Employee Compensation (EC)

- The total payroll cost is the sum of all employers' expenses for their wage and salary employees. This encompasses not only their wages and salaries but also includes all benefits provided, such as health and retirement benefits. Additionally, it accounts for payroll taxes, covering both sides of social security and unemployment insurance taxes and other related costs. This comprehensive calculation, also known as "fully loaded payroll," reflects employers' complete financial burden for their workforce.

Proprietor Income (PI)

- Includes payments received by self-employed individuals and business owners who are not incorporated. Specifically, it represents the income generated from the current operations of sole proprietorships, partnerships, and tax-exempt cooperatives. It considers the capital consumption allowance and is recorded on Federal Tax form 1040C. However, it does not include dividends, monetary interest received by nonfinancial businesses, or rental income received by individuals not primarily involved in real estate. It's worth noting that Labor Income can be negative if the proprietor incurs a net loss in their business operations.

Other Property Income (OPI)

- Measures the income that industries generate in economies from non-operational activities. OPI is calculated by subtracting proprietor income from the gross operating surplus. This metric is essential to each industry's Leontief Production Function, helping us understand how industries perform and income distribution across different sectors.

To better inform policymakers and the County's development partners, it is crucial to break down the value-added impact of the leisure and hospitality sector into three key sub-categories. Figure 24 shows the top 10 industries ranked by their employee compensation impact. The leading five industries include food and drinking places, making an impressive \$1.29 billion impact, followed by performing arts and spectator sports at \$727.4 million, amusement, gambling, and recreation at

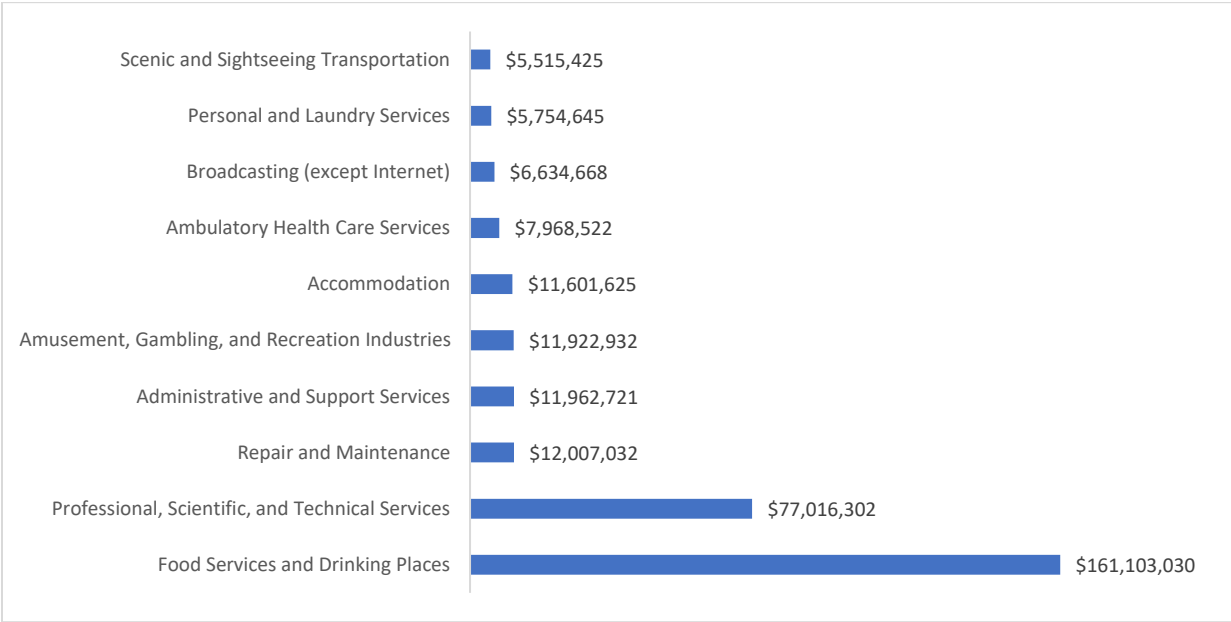
\$233.4 million, professional, scientific, and technical services at \$228.4 million, and management of companies and enterprises at \$212 million.

Figure 24. Top 10 Value-Added Impact Industries: Employee Compensation



Figure 25 illustrates the top 10 industries' proprietor income. In this category, food, and drinking places take the lead again, contributing \$161.1 million, followed by professional, scientific, and technical services at \$77 million, repair and maintenance at \$12 million, administrative support services at \$11.96 million, and amusement, gambling, and recreation at \$11.92 million.

Figure 25. Top 10 Value-Added Impact Industries: Proprietor Income



Lastly, Figure 26 shows the top 10 industries regarding other property income. Once more, food and drinking places hold the top spot with an impressive \$716.5 million impact, followed by

performing arts and spectator sports at \$529 million, real estate at \$389.3 million, amusement and gambling at \$290.2 million, and monetary authorities at \$102.6 million.

Figure 26. Other Property Income Value Added: Top 10 Industries



These insights offer a comprehensive understanding of the diverse sectors impacted by the value-added contributions of the leisure and hospitality industry.

2.6. Occupational Impacts

Another crucial aspect to consider when examining the economic impact of the leisure and hospitality sector is its effect on various occupations. Understanding the occupational impacts sheds light on which job roles benefit the most from the sector's economic activities, including direct, indirect, and induced effects. Table 6 offers valuable information on the top 20 occupations influenced by the sector's activities. Among the top ten influenced occupations are food and beverage workers, with 30 million work hours, followed by cooks and food preparation workers, with 14.1 million work hours. Supervisors of food preparation and serving workers total 6.5 million work hours, while other food preparation and serving-related workers total 6.54 million work hours. Additionally, retail sales workers account for 4.99 million work hours, motor vehicle operators for 3.8 million work hours, information and record clerks for 2.65 million work hours, building cleaning and pest control workers for 2.41 million work hours, other management occupations with 2.3 million work hours, and business operations specialists with 2.2 million work hours. These insights better explain how the leisure and hospitality sector impacts various occupations and contributes to the broader workforce.

Table 6. Top 20 Occupational Impacts by Hours Worked

Dim Occupation Occupation	Fact Results Impacts Wage and Salary	Fact Results Impacts Wage	Fact Results Impacts Supplements to Wage	Fact Results Impacts Employee	Fact Results Impacts Hours Worked
Food and Beverage Serving Workers	25,795	498,453,134	74,753,977	573,207,111	29,596,457
Cooks and Food Preparation Workers	10,124	242,994,935	36,578,617	279,573,552	14,090,610
Supervisors of Food Preparation and Serving Workers	3,781	158,698,110	23,821,697	182,519,808	6,543,377
Other Food Preparation and Serving Related Workers	4,956	87,461,563	13,201,119	100,662,682	4,991,795
Retail Sales Workers	3,102	86,407,430	14,299,349	100,706,779	3,786,031
Motor Vehicle Operators	1,505	54,653,467	10,213,142	64,866,609	2,954,960
Information and Record Clerks	1,678	75,497,443	13,023,425	88,520,869	2,649,725
Building Cleaning and Pest Control Workers	1,596	51,031,184	8,327,780	59,358,964	2,421,990
Other Management Occupations	1,230	111,604,506	18,197,457	129,801,963	2,409,970
Business Operations Specialists	1,208	156,513,172	25,591,475	182,104,647	2,258,956
Top Executives	1,008	173,343,470	28,029,698	201,373,167	2,152,047
Material Moving Workers	1,310	65,550,190	11,638,944	77,189,134	2,144,873
Other Installation, Maintenance, and Repair Occupations	965	57,496,171	10,103,117	67,599,288	1,828,683
Entertainment Attendants and Related Workers	1,477	75,793,304	12,658,800	88,452,104	1,760,359
Computer Occupations	858	105,454,233	16,635,277	122,089,510	1,696,116
Other Protective Service Workers	973	58,734,371	9,708,695	68,443,065	1,469,377
Financial Clerks	742	45,975,284	7,901,222	53,876,505	1,297,640
Other Office and Administrative Support Workers	841	40,340,739	6,746,729	47,087,468	1,291,040
Healthcare Diagnosing or Treating Practitioners	694	81,579,068	17,286,482	98,865,549	1,266,679
Other Personal Care and Service Workers	1,193	26,640,609	4,739,356	31,379,965	1,222,344

To conclude the economic impact analysis, the key competencies associated with the leisure and hospitality sector are provided in Table 7. Understanding these essential skills can greatly aid in making informed workforce development policy decisions.

Table 7. Top 20 Competencies Associated with the LH Economic Impact

Description	Ext Description	Competen	Competen
Oral Comprehension	The ability to listen to and understand information and ideas presented through spoken words and sentences.	337,844	4.48%
Oral Expression	The ability to communicate information and ideas in speaking so others will understand.	326,187	4.32%
Near Vision	The ability to see details at close range (within a few feet of the observer).	290,604	3.85%
Speech Recognition	The ability to identify and understand the speech of another person.	285,041	3.78%
Speech Clarity	The ability to speak clearly so others can understand you.	271,196	3.59%
Problem Sensitivity	The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing that there is a problem.	264,728	3.51%
Written Comprehension	The ability to read and understand information and ideas presented in writing.	248,155	3.29%
Information Ordering	The ability to arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations).	236,263	3.13%
Deductive Reasoning	The ability to apply general rules to specific problems to produce answers that make sense.	235,269	3.12%
Inductive Reasoning	The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).	215,388	2.85%
Selective Attention	The ability to concentrate on a task over a period of time without being distracted.	208,223	2.76%
Written Expression	The ability to communicate information and ideas in writing so others will understand.	200,385	2.66%
Category Flexibility	The ability to generate or use different sets of rules for combining or grouping things in different ways.	201,081	2.66%
Trunk Strength	The ability to use your abdominal and lower back muscles to support part of the body repeatedly or continuously over time without "giving out" or fatiguing.	197,010	2.61%
Far Vision	The ability to see details at a distance.	195,493	2.59%
Time Sharing	The ability to shift back and forth between two or more activities or sources of information (such as speech, sounds, touch, or other sources).	188,681	2.50%
Manual Dexterity	The ability to quickly move your hand, your hand together with your arm, or your two hands to grasp, manipulate, or assemble objects.	185,481	2.46%
Arm-Hand Steadiness	The ability to keep your hand and arm steady while moving your arm or while holding your arm and hand in one position.	180,369	2.39%
Finger Dexterity	The ability to make precisely coordinated movements of the fingers of one or both hands to grasp, manipulate, or assemble very small objects.	175,954	2.33%
Perceptual Speed	The ability to quickly and accurately compare similarities and differences among sets of letters, numbers, objects, pictures, or patterns. The things to be compared may be presented at the same time or one after the other. This ability also includes compa	162,796	2.16%

The top ten competencies for this sector include oral comprehension, oral expression, near vision, speech recognition, speech clarity, problem sensitivity, written comprehension, information ordering, deductive reasoning, and inductive reasoning. It's important to note that deductive reasoning involves drawing specific conclusions from general principles, while inductive reasoning entails forming general principles based on specific observations or evidence. Awareness of these competencies can be instrumental in effectively managing and enhancing the leisure and hospitality industry workforce.

3. LOCATION QUOTIENT REVIEW

Downtown Cleveland and its development partners, such as TEAM NEO, have identified three main sectors of good job growth opportunities for northeast Ohio, including smart manufacturing, information technology, and health care. Due to the nature of what they deem as healthcare, we split the healthcare sector into healthcare services and healthcare-related industry segments (see Appendix 2 for a full breakdown of what constitutes each sector). It is important to compare those sectors to the leisure and hospitality sectors and check how they impact each other.

Working with the partners and the county, we have identified nineteen peer counties with cities we are like or aspire to be. Of these nineteen counties, two are Ohio counties, including Franklin and Hamilton.

3.1. The Nineteen Peer Cities and their Counties

After engaging in extensive consultations with various stakeholders, we have identified nineteen cities whose leisure and hospitality sectors closely resemble the City of Cleveland. These cities encompass a diverse range, including Baltimore, Buffalo, Cincinnati, Columbus, Detroit, Indianapolis, Louisville, Milwaukee, Minneapolis, Pittsburgh, Rochester, St. Louis, Nashville, Austin, San Francisco, Seattle, Portland, Boston, Detroit (again), and Denver.

To gain a comprehensive perspective, we have expanded our analysis to include the representative counties for each of these peer cities. You can find a list of these cities and their respective counties and states in Table 8. Our next step involves thoroughly comparing these counties, focusing on factors such as wages, employment statistics, and industry specialization within the leisure and hospitality sector.

Additionally, we will delve into the interrelationships between leisure and hospitality sector employment and three key industries that have been previously described. The objective is to uncover causal connections between their respective employment patterns. Through this investigation, we aim to gain insights into potential job growth expectations within the sectors and how they mutually influence each other.

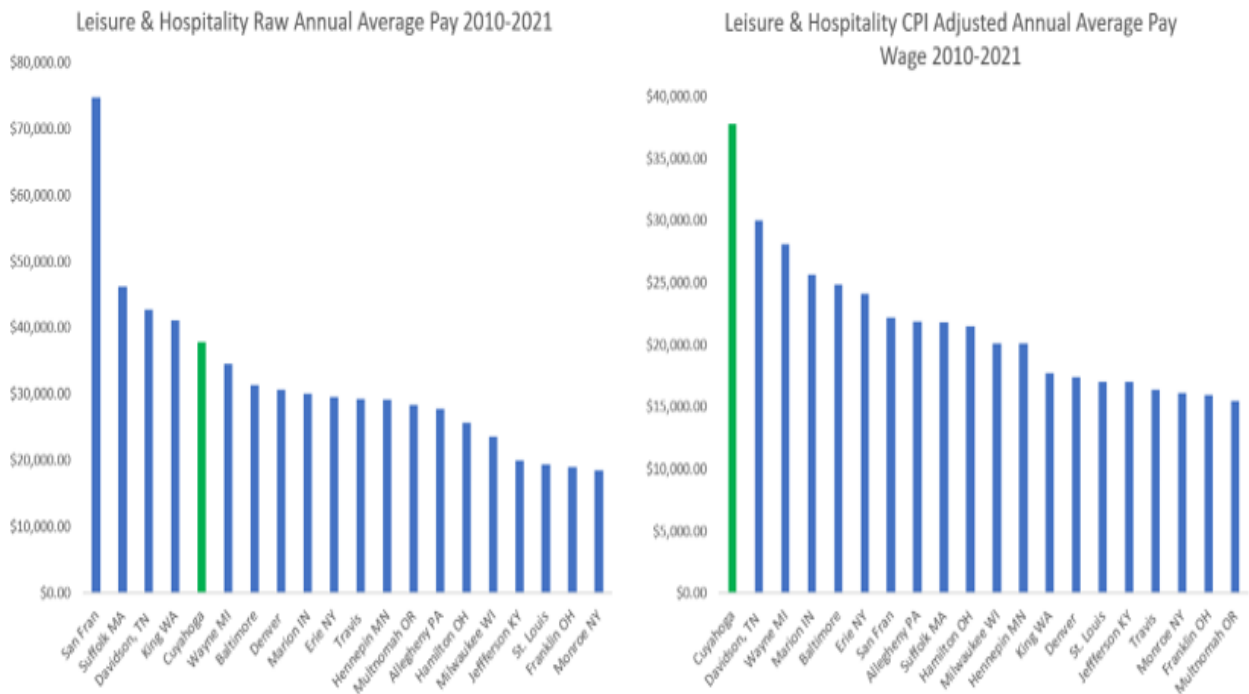
Table 8. List of Cities and Corresponding Counties

City	County & State	City	County & State
Baltimore	Baltimore County (MD)	St. Louis	St. Louis County (MO)
Buffalo	Erie County (NY)	Nashville	Davidson County (TN)
Cincinnati	Hamilton County (OH)	Austin	Travis County (TX)
Columbus	Franklin County (OH)	San Francisco	San Francisco County (CA)
Indianapolis	Marion County (IN)	Seattle	King County (WA)
Louisville	Jefferson County (KY)	Portland	Multnomah County (OR)
Milwaukee	Milwaukee County (WI)	Boston	Suffolk County (MA)
Minneapolis	Hennepin County (MN)	Denver	Denver County (CO)
Pittsburgh	Allegheny County (PA)	Detroit	Wayne County (MI)

3.2. County-Level Leisure & Hospitality Wage Comparisons

Some interesting findings emerge when we look closer at the leisure and hospitality sector wages among nineteen peer counties compared to Cuyahoga County. According to Figure 27, the top five counties with the highest nominal wages in this sector are San Francisco County (California), Suffolk County (Massachusetts), Davidson County (Tennessee), King County (Washington), and Cuyahoga County (Ohio). They have average incomes of \$74,790, \$46,223, \$42,797, \$41,177, and \$37,760, respectively.

Figure 27. Comparative Leisure and Hospitality Average Annual Pay



However, to truly understand the real purchasing power of these wages, it's essential to factor in the cost of living in each county. Once we account for the cost of living, a more accurate picture emerges, and Cuyahoga County's leisure and hospitality wages stand out as the most favorable among the 20 counties considered. Despite having a lower nominal wage than the top four counties, Cuyahoga County's adjusted wage of \$37,560 becomes the highest when living expenses are considered.

This adjustment underscores the significance of considering local expenses and overall affordability within each region. Cuyahoga County outperforms other counties because its cost of living is lower than counties with higher nominal wages. Following Cuyahoga County, the next four counties with the highest adjusted wages for the leisure and hospitality sector are Davidson County (Tennessee), Wayne County (Michigan), Marion County (Indiana), and Baltimore County (Maryland). These counties also offer competitive adjusted wages after accounting for the cost of living.

It's crucial to remember that looking at adjusted wages gives us a more practical understanding of the purchasing power and the quality-of-life individuals can have in each county. This comparison highlights the importance of considering not just the nominal wages but also the cost of living when assessing the economic conditions and possibilities in various areas. Analyzing the adjusted wages empowers policymakers, businesses, and individuals to make well-informed decisions regarding job opportunities, potential moves, and overall financial strategies, ultimately providing a more realistic picture of the economic landscape within each county's leisure and hospitality sector.

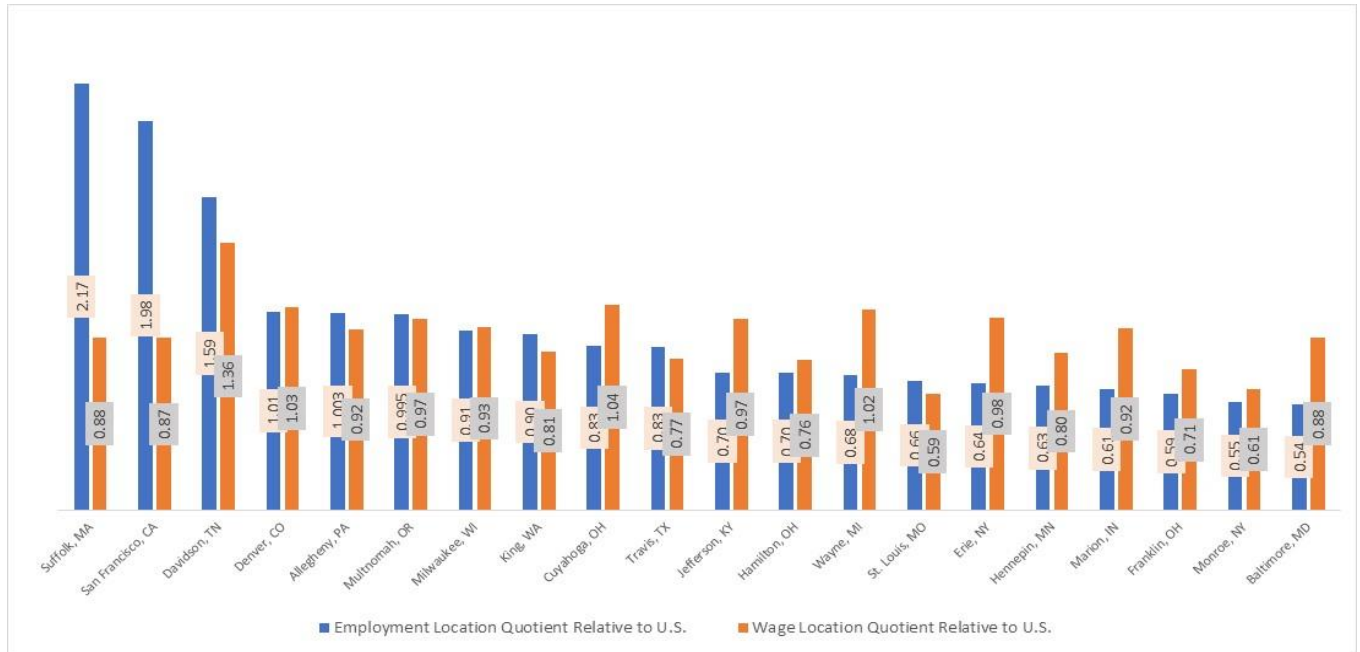
3.3. Regional Concentration Analysis

To what extent do leisure and hospitality jobs cluster in Cuyahoga County compared to peer counties? To answer this question, we use location quotient (L.Q.) for employment and total wages of the sector for nineteen peer counties and juxtaposed to that of Cuyahoga County for 2022. The L.Q.s are measures that compare the concentration of an industry within a specific area to the concentration of that industry nationwide. For example, the L.Q. for the leisure & hospitality sector employment for Cuyahoga County will be calculated using the following steps (Note that the steps are the same for the total wages location quotients):

1. Cuyahoga County Local Concentration = (County Private Leisure and Hospitality Employment) / (All-County Total Employment, All-Ownerships)
2. National Concentration = (U.S. Private Leisure and Hospitality Employment) / (All-Industry Total, All-Ownerships, U.S.)
3. Cuyahoga County Leisure & Hospitality Employment Location Quotient = Local Concentration / National Concentration

Location quotients (L.Q.) offer a valuable means of comparing how employment is distributed across industries, ownership, and size classes in a particular area concerning a reference area. For our 2022 analysis of twenty U.S. counties, higher location quotients indicate a greater likelihood of exporting goods or services outside the county, such as leisure and hospitality. Among the top five counties with the highest employment location quotients were Suffolk County (2.17), San Francisco County (1.98), Davidson County (1.59), Denver County (1.01), and Allegheny County (1.00). In contrast, Cuyahoga County ranked 10th, indicating a relatively lower specialization in the leisure and hospitality sector than the leading counties (See Figure 28). Only four of the twenty counties demonstrated leisure & hospitality specialization higher than the national average.

Figure 28. 2022 Leisure & Hospitality Employment & Wage Location Quotient Relative to U.S.



Shifting our focus to the wage location quotient for the leisure and hospitality sector, Davidson County leads the way with an L.Q. of 1.36, signifying a higher concentration of higher wages in this industry. The top five counties in terms of wage L.Q. also include Cuyahoga County (1.04), Denver County (1.03), Wayne County (1.02), and Erie County (0.98), completing the list. Notably, only Davidson and Denver counties simultaneously achieved positions in the top five for employment and wage location quotients.

These findings underscore the importance of considering employment and wage location quotients to understand each county's leisure and hospitality industry performance. Identifying counties that excel in both categories can offer valuable insights for strategic decision-making, targeted investments, and initiatives to bolster further the growth and competitiveness of the leisure and hospitality sector in the region. This data is a crucial tool to support informed and effective efforts to enhance economic opportunities and development in the leisure and hospitality domain.

Table 9 is a 2x2 matrix that combines the twenty counties into four groups based on their leisure and hospitality employment levels and wage location quotients. The categories include what we have labeled as Thriving Leisure & Hospitality Hubs, Employment-Focused Leisure & Hospitality Counties, High Wage Leisure & Hospitality Enclaves, and Struggling Leisure & Hospitality Regions. The following presents an overview of all the four categories.

Table 9. Leisure and Hospitality Employment and Wage Location Quotient Groupings
Average Annual Wage Location Quotient (L.Q.)

		LQ >1	LQ <1
Employment Location Quotient (L.Q.)	LQ > 1	Allegheny (PA), Davidson (TN), & Denver (CO)	San Francisco (CA), & Suffolk (MA)
	LQ < 1	Cuyahoga (OH), & Wayne (MI)	Baltimore (MD), Erie (NY), Franklin (OH), Hamilton (OH), Hennepin (MN), King (WA), Jefferson (KY), Marion (IN), Monroe (NY), Multnomah (OR), Milwaukee (WI), St. Louis (MO), & Travis (TX)

3.3.1 Thriving Leisure & Hospitality Hubs

This category includes counties with high employment and wage location quotients. These counties have a strong concentration of leisure and hospitality jobs and higher-than-average wages. Three counties, including Allegheny (PA), Davidson (TN), and Denver (CO) counties are in this group. These counties have managed to keep employment in the industry relatively higher than the national average and still have nominal wage conditions better than the national average for the leisure and hospitality sector.

Being part of the Thriving Leisure & Hospitality Hubs, including counties with high employment and wage location quotients, brings advantages and challenges. These counties boast a strong concentration of leisure and hospitality jobs, providing ample employment opportunities for residents. The thriving industry attracts tourists and visitors, increasing consumer spending and a vibrant economy. Furthermore, the higher-than-average wages in this sector attract skilled workers, fostering a motivated and talented workforce.

However, there are some drawbacks to being a thriving hub. The heavy reliance on the leisure and hospitality industry can make the local economy susceptible to fluctuations in tourism or unexpected events like natural disasters or economic downturns. Additionally, the influx of people may strain housing and infrastructure, causing higher living costs and urban development challenges. To address these issues and ensure long-term stability and growth, these counties must plan wisely and diversify their economy beyond the leisure and hospitality sectors. Finding a balance between sustaining their thriving status and implementing sustainable economic strategies will be key to their continued success while mitigating potential risks.

3.3.2 Employment-Focused Leisure & Hospitality Counties

This category includes counties with high employment location quotients but low wage location quotients. These counties have a significant number of leisure and hospitality jobs, but the wages in the sector are relatively lower compared to other areas. The counties in this category include San Francisco (CA) and Suffolk (MA). These two counties have a large domestic population, attracting many visitors, which warrants high employment in the leisure and hospitality sectors. However, these two counties also belong to the group of high-cost counties, thus making nominal wage conditions below the national average even more dire.

The counties in the Employment-Focused Leisure & Hospitality group face significant challenges in providing their leisure and hospitality workers with a living wage. Despite this, they also have some advantages and opportunities. On the positive side, these counties offer many leisure and hospitality jobs, creating ample employment opportunities for residents. This can lead to decreased unemployment rates and a boost in workforce participation, contributing to overall economic growth in the region. The thriving leisure and hospitality sector may also attract tourists and visitors, stimulating the local economy through increased spending and business revenue. However, these counties' low-wage location quotients present notable drawbacks. Despite the abundance of jobs, wages in the leisure and hospitality industry are relatively lower compared to other regions. This financial disparity can create hardships for workers, making it challenging to cover living expenses and save for the future. The lower wages might also lead to a less motivated workforce, as employees may feel undervalued and less inclined to invest in their careers or job performance.

To address these challenges and enhance the benefits, these counties can focus on initiatives that promote economic growth and development within the leisure and hospitality sector. Raising wage levels and improving working conditions can boost employee satisfaction, productivity, and retention. Investing in training and skills development programs can also help elevate the quality of the workforce, potentially leading to higher wages due to increased expertise. Achieving a balance between job growth and improved wages is crucial for ensuring sustainable and inclusive economic development in these Employment-Focused Leisure & Hospitality Counties.

3.3.3 High Wage Leisure & Hospitality Enclaves

This category includes counties with low employment location quotient but high wage location quotient. These counties might have fewer leisure and hospitality jobs, but the wages in the sector are notably higher than in other regions. The counties in this category include Cuyahoga (O.H.) and Wayne (MI). This group presents a unique set of advantages and challenges. On the positive side, workers in these counties enjoy relatively higher wages in the leisure and hospitality sectors compared to other areas. This group of counties presents a unique blend of advantages and challenges.

On the positive side, workers in these counties enjoy relatively higher wages in the leisure and hospitality sectors compared to other areas. This translates to improved living standards, increased purchasing power, and overall higher quality of life for those employed in this industry. Furthermore, by leveraging effective marketing and messaging, these higher wages can attract

skilled workers to the region, fostering a more competitive and motivated workforce. However, being characterized by a low employment location quotient also has drawbacks.

The limited number of leisure and hospitality jobs may curtail overall employment opportunities in these counties. This could lead to a potential mismatch between job demand and available skilled labor, hindering the sector's expansion and limiting its overall economic impact. Moreover, fewer jobs can result in a highly competitive job market, making it challenging for individuals seeking employment in this industry to secure a position.

Addressing the low employment location quotient becomes crucial to fully unlock the sector's potential and promote a balanced and sustainable economy. Encouraging growth and investment in the leisure and hospitality industry and fostering skill development and training programs can help create more job opportunities in these counties. By implementing the right marketing strategies and offering incentives to industry players, these counties can increase employment in the leisure and hospitality sectors. Attracting workers to relocate for these jobs can further enhance the benefits and contribute to these regions' overall growth and prosperity.

3.3.4 Struggling Leisure & Hospitality Regions

This category includes counties with both low employment and wage location quotients. These counties have limited job opportunities in the leisure and hospitality industry, and the wages in the sector are lower compared to other areas. This category includes thirteen of the twenty counties under consideration. These counties face limited job opportunities within the leisure and hospitality industry, making it more difficult for individuals to secure employment. Additionally, the wages offered in these jobs are comparatively lower than in other regions, posing challenges for workers to achieve financial stability and meet their needs. These circumstances can result in economic struggles within the community, potentially affecting the overall standard of living and growth prospects. Moreover, the lack of significant growth in the leisure and hospitality sector may prevent these counties from fully harnessing a thriving industry's potential economic benefits, such as increased tourism, local spending, and job creation.

Despite these obstacles, these regions have avenues for growth and improvement. By acknowledging the issues, stakeholders can focus on implementing strategies to enhance job prospects and attract investments in the leisure and hospitality sectors. Initiatives such as promoting tourism, investing in workforce training programs, and supporting economic development projects have the potential to create more job opportunities and increase wage levels over time. Additionally, leveraging the region's unique cultural or natural resources can create niche markets, setting these counties apart and fostering sustainable growth in the leisure and hospitality industry. By taking proactive steps to address these challenges, the Struggling Leisure & Hospitality Regions can revitalize their economies, generate new employment opportunities, and improve their residents' overall standard of living. Achieving these goals requires targeted efforts and strategic planning to revive the leisure and hospitality sector and create better job prospects with improved remuneration for the residents in these struggling regions.

Table 10 presents valuable insights into the top 10 American counties concerning leisure and hospitality employment and wage location quotients. As depicted in Table 6, on a national scale,

Gilpin, Mineral, Tunica, and Madison counties consistently secure positions within the top 5 counties for leisure and hospitality employment and wages location quotients, showcasing their specialization in this sector. In comparison, Cuyahoga County, with a leisure and hospitality employment location quotient of 0.87 and a wages location quotient of 1.00, ranks relatively lower at 1,606 and 960 out of 3,142 total counties in the USA, respectively, concerning employment and wages. This indicates that Cuyahoga County has room for improvement in leisure and hospitality job opportunities and wage levels compared to other counties nationwide.

Table 10. Top 10 American Counties: Leisure & Hospitality Employment and Wage Location Quotients

National Rank	County	Employment Location Quotient	National Rank	County	Wages Location Quotient
1	Gilpin County, Colorado	7.85	1	Gilpin County, Colorado	17.67
2	Tunica County, Mississippi	5.45	2	Mineral County, Colorado	12.76
3	Mineral County, Colorado	5.28	3	Tunica County, Mississippi	12.56
4	Madison County, Montana	4.99	4	Madison County, Montana	11.80
5	Denali Borough, Alaska	4.90	5	Alpine County, California	10.20
6	Mono County, California	4.78	6	Mono County, California	9.11
7	Billings County, North Dakota	4.47	7	Billings County, North Dakota	9.00
8	Alpine County, California	4.22	8	Switzerland County, Indiana	8.14
9	Sevier County, Tennessee	4.13	9	Hooker County, Nebraska	8.04
10	Keweenaw County, Michigan	3.95	10	Denali Borough, Alaska	7.91
1,606	Cuyahoga County, Ohio	0.87	960	Cuyahoga County, Ohio	1.00

Table 11 presents an overview of the leisure and hospitality employment and wages location quotients for 20 Ohio counties in 2022. Notably, Erie, Ottawa, Hocking, Fairfield, and Delaware counties consistently secure positions within the top five for leisure and hospitality, indicating their strong specialization in this sector. However, while still performing relatively well, Cuyahoga County ranks 56th and 16th in employment and wages location quotients, respectively. While this suggests that Cuyahoga County has a solid foundation in the leisure and hospitality industry, there is room for growth and improvement compared to both the national and state averages.

Considering Ohio's population and economy, these counties' leisure and hospitality sectors present an exciting growth opportunity. By nurturing and enhancing this sector, the counties can further boost their residents' job opportunities and economic prosperity. Strategic initiatives to promote tourism, improve infrastructure, and invest in workforce development can contribute to the sector's growth potential. Emphasizing each county's unique cultural and natural resources can also help create niche markets and attract more visitors and businesses, generating additional revenue and opportunities for local businesses. Overall, the findings indicate that the leisure and hospitality sector holds promise for further expansion, making it a valuable area to focus on for economic growth and development in the region.

Table 11. Top 20 Ohio Counties: Leisure & Hospitality Employment and Wage Location Quotients

State Ranking	National Ranking	County	Employment Location Quotient		State Ranking	National Ranking	County	Wages Location Quotient
1	74	Erie County, Ohio	2.39		1	87	Erie County, Ohio	3.35
2	124	Ottawa County, Ohio	1.99		2	158	Ottawa County, Ohio	2.46
3	150	Hocking County, Ohio	1.89		3	198	Hocking County, Ohio	2.17
4	262	Delaware County, Ohio	1.52		4	493	Fairfield County, Ohio	1.33
5	344	Fairfield County, Ohio	1.41		5	538	Delaware County, Ohio	1.28
6	435	Warren County, Ohio	1.31		6	635	Brown County, Ohio	1.18
7	449	Athens County, Ohio	1.30		7	682	Mahoning County, Ohio	1.14
8	450	Clermont County, Ohio	1.30		8	694	Athens County, Ohio	1.13
9	513	Belmont County, Ohio	1.24		9	695	Clermont County, Ohio	1.13
10	527	Brown County, Ohio	1.23		10	696	Belmont County, Ohio	1.13
11	547	Mahoning County, Ohio	1.22		11	774	Guernsey County, Ohio	1.09
12	567	Guernsey County, Ohio	1.21		12	853	Trumbull County, Ohio	1.04
13	568	Trumbull County, Ohio	1.21		13	863	Hamilton County, Ohio	1.04
14	754	Butler County, Ohio	1.12		14	876	Stark County, Ohio	1.03
15	755	Lucas County, Ohio	1.12		15	914	Warren County, Ohio	1.01
16	782	Defiance County, Ohio	1.11		16	960	Cuyahoga County, Ohio	1.00
17	783	Greene County, Ohio	1.11		17	1016	Lucas County, Ohio	0.97
18	833	Lake County, Ohio	1.09		18	1041	Lake County, Ohio	0.96
19	834	Medina County, Ohio	1.09		19	1053	Meigs County, Ohio	0.96
20	856	Portage County, Ohio	1.08		20	1096	Richland County, Ohio	0.94
56	1,606	Cuyahoga County, OH	0.87					
88		Total Counties						

4. Leisure & Hospitality Location Quotient Comparisons to Other Critical Sectors & Causality Analysis

Downtown Cleveland and its development partners, such as TEAM NEO, have identified three main sectors of good job growth opportunities for northeast Ohio, including smart manufacturing, information technology, and healthcare sectors. Due to the nature of what they deem as healthcare, we split the healthcare sector into healthcare services and healthcare-related industry segments (see Appendix 2 for a full breakdown of what constitutes each sector). It is important to compare those sectors to the leisure and hospitality sectors and check how they impact each other. As such, we collected annual location quotient and employment data for Cuyahoga County and its nineteen peer counties for the 2010-2022 period to aid in comparing the location quotients for these four critical sectors to the leisure and hospitality sector for the twenty counties. As the county and its development partners work to grow jobs in these vital sectors, it is important to ascertain the causal impacts on jobs in other sectors, such as the leisure and hospitality sectors. As such, we seek to answer the following questions:

1. What kind of causal relationship exists between job growth in the four critical sectors (smart manufacturing, IT, healthcare services, and healthcare-related industries) and the leisure and hospitality sector?
2. Do the casual relationships depend on the level of employment location quotients?

4.1. Causal Relationships Between Job Growth in the Four Critical Sectors and Leisure & Hospitality Sector

Downtown Cleveland and its development partners, such as TEAM NEO, have identified three main sectors of good job growth opportunities for northeast Ohio: smart manufacturing, information technology, and health care. Due to the nature of what they deem as healthcare, we split the healthcare sector into healthcare services and related industry segments (see Appendix 2 for a full breakdown of what constitutes each sector). It is important to compare those sectors to the leisure and hospitality sectors and check how they impact each other.

Before analyzing the causal relationships between the critical industries identified above and the Leisure and Hospitality sectors for the twenty counties under consideration, it is important to understand the level of specialization in these sectors by the counties. This will allow us to understand the intricacies of the relationships. As such, we investigate the level of specialization in employment and wages for the sectors relative to each county for the period under investigation. This enables us to break down the causal relationships by the level of employment specialization in particular. Table 12 separates the counties into those that consistently exhibit location quotients greater than one ($L.Q.>1$) from the rest. The following describes our findings for the twelve years under consideration.

4.1.1 Healthcare-Related Industries

Over the twelve years of this analysis, when it comes to healthcare-related industries, Cuyahoga County, along with nine of its peer counties, including San Francisco, Suffolk, Baltimore, Hamilton, King, Multnomah, Davidson, Travis, and Milwaukee counties, consistently recorded

employment location quotients of less than one. Additionally, none of these counties reported wage location quotients greater than one. These findings suggest that the healthcare industry in these counties is far from saturated, presenting significant growth opportunities in this sector. The data indicates ample room for expansion and development within the healthcare-related industries, offering promising prospects for these counties to further develop and excel in this critical sector.

4.1.2 Healthcare Services Sector

Regarding the healthcare services sector, it is no surprise that Cuyahoga County and fourteen other counties consistently demonstrate employment location quotients greater than one. However, Cuyahoga County is not among the counties with wage location quotients consistently greater than one. This suggests that while the county is known for its specialization in healthcare services, the salaries paid in this sector are below the national average. Only Marion, Jefferson, Davidson, and Milwaukee counties consistently exhibit location quotients greater than one for healthcare services, employment, and wages throughout the period under consideration. These counties stand out for their notable performance in both aspects of the healthcare industry, which highlights their strong position within this sector.

Table 12. Twenty County Location Quotient Comparison for 2010-2022

Counties	Healthcare Related Industries Employment LQ	Healthcare Services Employment LQ	Information Technology Employment LQ	Leisure & Hospitality Employment LQ	Smart Manufacturing Employment LQ	Healthcare Related Industries Pay/YR LQ	Healthcare Services Pay/YR LQ	Information Technology Pay/YR LQ	Leisure & Hospitality Pay/YR LQ	Smart Manufacturing Pay/YR LQ
San Francisco County, CA			LQ >1	LQ >1						
Denver County, CO	LQ >1		LQ >1							
Marion County, IN	LQ >1	LQ >1					LQ >1			
Jefferson County, KY	LQ >1	LQ >1					LQ >1			
Suffolk County, MA		LQ >1	LQ >1	LQ >1						
Baltimore County, MD		LQ >1					LQ >1		LQ >1	
Wayne County, MI	LQ >1	LQ >1								
Hennepin County, MN	LQ >1	LQ >1	LQ >1							
St. Louis County, MS	LQ >1	LQ >1								
Erie County, NY	LQ >1	LQ >1			LQ >1		LQ >1		LQ >1	
Monroe County, NY	LQ >1	LQ >1								
Hamilton County, OH		LQ >1			LQ >1					
Franklin County, OH	LQ >1	LQ >1								
Cuyahoga County, OH		LQ >1			LQ >1				LQ >1	
King County, WA			LQ >1	LQ >1						
Multnomah County, OR			LQ >1				LQ >1			
Allegheny County, PA	LQ >1	LQ >1	LQ >1							
Davidson County, TN		LQ >1					LQ >1		LQ >1	
Travis County, TX			LQ >1							
Milwaukee County, WI		LQ >1			LQ >1		LQ >1			

4.1.3 Information Technology Sector

Regarding the Information Technology sector, eight counties, namely San Francisco, Denver, Suffolk, Hennepin, King, Multnomah, Allegheny, and Travis, consistently showed employment location quotients greater than one. Interestingly, none of these counties exhibited IT wage location

quotients greater than one during the period under consideration. This indicates that while eight of Cuyahoga County's peer counties specialize in IT, their relative wages are below the national average. These counties appear to excel in employment opportunities in the IT industry. Still, they need to address the issue of comparatively lower wages to fully capitalize on the sector's potential and retain skilled IT professionals effectively.

4.1.4 Smart Manufacturing

In the Smart Manufacturing sector, only three counties out of the comparison group, namely Erie, Hamilton, and Cuyahoga Counties, consistently show employment location quotients greater than one. However, none of these counties consistently exhibit wage location quotients greater than one. This suggests that while these three counties specialize in smart manufacturing, the relative wages in this sector are below the national average. Despite their focus on the smart manufacturing industry, these counties need to address the issue of lower wages to fully harness the potential of this sector and foster sustainable growth and competitiveness in the region.

4.1.5 Leisure and Hospitality

When considering the Leisure and Hospitality sector, only San Francisco, Suffolk, and King counties consistently show employment location quotients greater than one. On the other hand, Baltimore, Erie, Cuyahoga, and Davidson counties consistently exhibit wage location quotients greater than one for the period under consideration. This indicates that while Cuyahoga County has potential for growth in its leisure and hospitality sector, the wages paid in this industry are relatively better than the national average. This data suggests that Cuyahoga County's leisure and hospitality sector is on a promising trajectory, and the higher wages being offered can contribute to attracting skilled workers and fostering a competitive and motivated workforce in this vital industry.

4.2. Employment Causality Analysis Methodology

To gain deeper insights into the dynamics among the five sectors in the counties, we are examining, we conducted a thorough causality test between jobs in these industries, focusing on both high and low employment location quotients. The aim was to understand the cause-and-effect relationships between the employment levels in these sectors within the respective counties. The results of this test are crucial in comprehending how these industries influence each other's growth and performance. By analyzing the causality between job numbers in these sectors, we can identify which industries drive job creation and economic development in specific counties. This valuable information can guide policymakers, businesses, and stakeholders in making informed decisions to bolster the growth of these industries and enhance overall economic prosperity in the region.

We conducted Granger non-causality tests to investigate the causal relationships between employment in the leisure and hospitality sector and employment in other critical sectors, such as healthcare, smart manufacturing, and the information technology sub-sectors. These tests aim to examine the temporal relationship between employment in these sectors within the County's economy. In our analysis, we utilized the `xtgrangert` command in STATA, which implements the panel Granger non-causality testing approach developed by Juodis, Karavias, and Sarafidis (2021, *Empirical Economics* 60: 93–112). This testing approach offers several advantageous properties. It can be applied to multivariate systems, provides statistical power against homogeneous and

heterogeneous alternatives, and accommodates cross-section dependence and heteroskedasticity. By employing this method, we can assess the causal dynamics between employment in the leisure and hospitality sector and the identified critical sectors, shedding light on the temporal relations within the County's economy.

We consider the following linear dynamic panel-data model,

$$y_{i,t} = \phi_{0,i} + \sum_{p=1}^P \phi_{p,i} y_{i,t-p} + \sum_{p=1}^P \beta_{p,i} x_{i,t-p} + \varepsilon_{i,t}$$

for $i = 1, \dots, N$ and $t = 1, \dots, T$. Without loss of generality and for ease of exposition, $x_{i,t}$ is assumed to be a scalar. The parameters $\phi_{0,i}$ denote the individual-specific effects, $\varepsilon_{i,t}$ are the errors, $\phi_{p,i}$ denote the heterogeneous autoregressive coefficients, $p = 1, \dots, P$, and $\beta_{p,i}$ are the heterogeneous feedback coefficients or Granger-causality parameters.

The restriction that the number of lags of $y_{i,t}$ is the same as that of $x_{i,t}$ has the benefit of a minimal computational cost when it comes to lag-length selection.

The null hypothesis that $x_{i,t}$ does not Granger-cause $y_{i,t}$ can be formulated as a set of linear restrictions on the parameters in (1):

$$H_0: \beta_{p,i} = 0, \text{ for all } i \text{ and } p$$

The alternative hypothesis is

$$H_1: \beta_{p,i} \neq 0 \text{ for some } i \text{ and } p$$

Failure to reject the null hypothesis can be interpreted as $x_{i,t}$ not Granger-causing $y_{i,t}$. The same applies when $x_{i,t}$ consists of multiple relevant variables and is a $k \times 1$ vector of regressors. In our case, the employment in each sector is used as our Y variables, where the X variables include the employment in the other sectors, respectively. The analysis utilizes annual employment data for the four critical sectors, covering the period from 2010 to 2020 for the county of interest and nineteen peer and aspirant counties. Also, note that we employed a one-period lag in all our estimations.

4.3. Causality Analysis Results

As indicated by Table 13, when the leisure & hospitality employment location quotient is greater than 1, a unit increase in smart manufacturing and information technology jobs leads to 14.33 and 1.61 jobs being created, respectively, in the leisure & hospitality sector. On the other hand, an increase in healthcare services jobs leads to a 5.28 reduction in leisure & hospitality jobs. In contrast, increases in healthcare-related industry jobs have no significant impact. In such counties, leisure, and hospitality jobs increase leads to 0.05, 0.06, and 0.02 jobs created in the smart manufacturing, healthcare-related, and healthcare services industries, respectively. In contrast, it leads to a 0.04 reduction in employment in the IT sector. Overall, in these counties, leisure, and hospitality jobs increase leads to 0.09 jobs created in these four sectors. In counties with a leisure and hospitality employment quotient less than 1, an increase in smart manufacturing jobs and

healthcare-related industry jobs led to 2.65 and 1.67 jobs being created in the leisure and hospitality sectors, respectively.

On the other hand, increases in health care services and IT jobs lead to a 0.99 and 2.25 reduction in the leisure & hospitality sector jobs, respectively. In these counties, leisure, and hospitality job growth leads to .03 jobs created in smart manufacturing and a reduction of 0.02 jobs in healthcare-related industries. Overall, an increase in leisure and hospitality jobs leads to 0.01 jobs created in the four sectors combined.

Table 13. Comparative Employment Causal Relationships for Cases where Leisure and Hospitality Sector Employment Location Quotient > 1 vs <1

	Leisure & Hospitality LQ >1		Leisure & Hospitality LQ <1	
	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality
Smart Manufacturing	14.33	0.05	2.65	0.03
Healthcare Related Industries	NS	0.06	1.67	-0.02
Healthcare Services Industry	-5.28	0.02	-0.99	NS
Information Technology	1.61	-0.04	-2.25	NS
Total Impact	10.66	0.09	1.08	0.01

In counties where the leisure & hospitality employment location quotient exceeds one, we observed interesting cause-and-effect relationships between various industries. Specifically, a unit increase in smart manufacturing and information technology jobs leads to the creation of 14.33 and 1.61 jobs, respectively, in the leisure & hospitality sectors. On the other hand, an increase in healthcare services jobs reduces 5.28 leisure & hospitality jobs. At the same time, no significant impact is observed for gains in healthcare-related industry jobs. Furthermore, when leisure and hospitality jobs increase in these counties, we found that it creates 0.05, 0.06, and 0.02 jobs in the smart manufacturing, healthcare-related, and healthcare services industries, respectively. However, there is a slight reduction of 0.04 jobs in the IT sector.

In summary, in these counties, every growth in leisure and hospitality jobs contributes to the creation of 0.09 jobs across these four sectors. Conversely, in counties where the leisure and hospitality employment quotient is less than 1, we discovered different patterns of causality. An increase in smart manufacturing jobs and healthcare-related industry jobs leads to the creation of 2.65 and 1.67 jobs, respectively, in the leisure and hospitality sectors. On the contrary, increases in healthcare services and IT jobs result in a reduction of 0.99 and 2.25 leisure & hospitality sector jobs, respectively. In addition, in these counties, leisure, and hospitality job growth leads to the creation of 0.03 jobs in smart manufacturing but results in a slight reduction of 0.02 jobs in healthcare-related industries. Overall, an increase in leisure and hospitality jobs contributes to the creation of only 0.01 jobs across these four sectors combined. Understanding these intricate interrelationships between industries is essential for crafting effective strategies and policies to stimulate economic growth and job creation within specific counties. By acknowledging these cause-and-effect connections, decision-makers can better allocate resources and foster the growth

of industries that positively impact employment and economic development in their respective regions.

Table 14 provides insightful data regarding counties with a smart manufacturing location quotient greater than one. It reveals the impact of job increases in smart manufacturing and the healthcare-related industry on job creation in the leisure and hospitality sectors. Notably, job increases in smart manufacturing resulted in the creation of 1.16 jobs in smart manufacturing and an impressive 6.54 jobs in the healthcare-related industry within the leisure and hospitality sectors. However, there is a significant drawback, as an increase in IT-related jobs leads to 3.52 job losses in the leisure and hospitality sector, and there is no substantial impact from increases in healthcare services jobs on leisure and hospitality.

Table 14. Comparative Employment Causal Relationships for Cases where Smart Manufacturing Sector Employment Location Quotient > 1 vs <1

	Smart Manufacturing LQ >1		Smart Manufacturing LQ <1	
	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality
Smart Manufacturing	1.16	0.14	2.72	0.019
Healthcare Related Industries	6.54	0.27	1.63	-0.02
Healthcare Services Industry	NS	0.04	-0.89	NS
Information Technology	-3.52	0.07	-2.25	NS
Total Impact	4.18	0.52	1.21	-0.001

Conversely, the findings indicate a positive trend when considering these counties' leisure and hospitality job growth. Increased leisure and hospitality jobs contribute to job creation across all sectors, with 0.14, 0.27, 0.04, and 0.07 jobs being created in the smart manufacturing, healthcare-related, healthcare services, and IT industries, respectively. Overall, in these counties, every increase in leisure and hospitality jobs leads to the creation of 0.52 jobs in the four sectors combined, which is a promising outcome. On the other hand, for counties with a smart manufacturing location quotient of less than one, we observed different patterns of job creation and losses. An increase in smart manufacturing and healthcare-related industries jobs leads to the creation of 2.72 and 1.62 jobs in the leisure and hospitality sectors, respectively. However, increases in healthcare services and information technology jobs result in 0.89 and 2.25 job losses in the leisure and hospitality sectors, respectively. In addition, for these counties, leisure, and hospitality job growth leads to 0.02 jobs created in the smart manufacturing sector but also results in 0.02 jobs lost in the healthcare-related industries sector. These findings underscore the intricate relationships between various industries and highlight the importance of considering their interplay when formulating strategies for job creation and economic growth in specific regions. By recognizing these impacts, policymakers and stakeholders can make more informed decisions to bolster job opportunities and foster a thriving and diverse economy in these counties.

Table 15 provides valuable insights into counties with a healthcare services location quotient greater than one. It reveals the impact of job increases in healthcare-related industries, smart manufacturing, and IT on the leisure and hospitality sectors. Notably, job increases in healthcare-related industries result in the creation of 1.9 jobs in the leisure and hospitality sectors. However, there are contrasting effects from increases in smart manufacturing and IT jobs, with 1.89 and 1.35

jobs being shed in the leisure and hospitality sectors, respectively. This indicates a complex relationship between these counties' healthcare services sector and the leisure and hospitality industry. In these counties, an increase in leisure and hospitality jobs leads to a neutral impact on the IT sector, with no significant job creation. However, it results in 0.04 job losses in the healthcare-related industries subsector, while no substantial impact is observed on jobs in the smart manufacturing and healthcare services sectors. Overall, an increase in leisure and hospitality jobs in these counties leads to no net job creation for the four other industries combined.

Table 15. Comparative Employment Causal Relationships for Cases where Healthcare Services Sector Employment Location Quotient > 1 vs <1

	Healthcare Services LQ >1		Healthcare Services LQ <1	
	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality
Smart Manufacturing	-1.89	NS	6.62	0.05
Healthcare Related Industries	1.9	-0.04	4.68	-0.01
Healthcare Services Industry	NS	NS	-2.8	NS
Information Technology	-1.35	0.05	-0.54	NS
Total	-1.34	0.01	7.96	0.04

On the other hand, we see a different job creation and loss pattern for counties with healthcare services employment location quotient of less than one. Increases in smart manufacturing and healthcare-related industries lead to the creation of 6.62 and 4.68 jobs in the leisure and hospitality sectors, respectively. However, there are job losses from increases in healthcare services and IT jobs, with 2.8 and 0.54 jobs being lost in the leisure and hospitality sectors, respectively. Overall, an increase in leisure and hospitality jobs in these counties leads to the creation of 0.04 jobs in the four other industries. These findings highlight the varying impacts of different industries on the leisure and hospitality sector in counties with different location quotients for healthcare services. Understanding these dynamics is crucial for local policymakers and stakeholders to formulate targeted strategies to maximize job creation and economic growth in these counties. By identifying the specific sectors that contribute positively or negatively to the leisure and hospitality industry, these counties can make informed decisions to foster a balanced and prosperous economy.

Table 16 provides valuable insights into counties with a healthcare-related industries employment location quotient greater than one. It shows the impact of job increases in the healthcare-related sector, smart manufacturing, healthcare services, and IT on the leisure and hospitality sector. Notably, job increases in healthcare-related industries lead to the creation of 1.27 jobs in the leisure and hospitality sectors. However, there are contrasting effects from increases in smart manufacturing and healthcare services jobs, with 2.32 and 149 job losses, respectively, in the leisure and hospitality sectors. Interestingly, IT job increases do not significantly impact these counties' leisure and hospitality jobs. In these counties, an increase in leisure and hospitality jobs leads to the creation of 0.04 and 0.09 jobs in the healthcare services and IT industries, respectively. However, it results in 0.05 and 0.04 job losses in the smart manufacturing and healthcare-related

sectors, respectively. Overall, an increase in leisure and hospitality jobs for these counties creates 0.04 jobs in the four industries combined.

Table 16. Comparative Employment Causal Relationships for Cases where Healthcare Related Industries Employment Location Quotient > 1 vs <1

	Healthcare Related Industries LQ >1		Healthcare Related Industries LQ <1	
	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality
Smart Manufacturing	-2.32	-0.05	7.45	0.04
Healthcare Related Industries	1.27	-0.04	3.76	-0.02
Healthcare Services Industry	-1.49	0.04	-1.99	NS
Information Technology	NS	0.09	-0.7	NS
Total	-2.54	0.04	8.52	0.02

Conversely, for counties with a healthcare-related industry employment location quotient of less than one, we observe different dynamics of job creation and losses. Increases in smart manufacturing and healthcare-related industries lead to the creation of 7.45 and 3.76 jobs in the leisure and hospitality sectors, respectively. However, there are job losses from increases in healthcare services and IT jobs, with 1.99 and 0.7 jobs lost in the leisure and hospitality sectors, respectively. For these counties, an increase in leisure and hospitality jobs leads to the creation of 0.04 jobs in the smart manufacturing sector. Still, it results in 0.02 job losses in the healthcare-related industries sector. Overall, an increase in leisure and hospitality jobs for these counties creates 0.02 jobs combined in the four other industries. These findings highlight the complex and diverse interrelationships between different industries and the leisure and hospitality sector in counties with varying healthcare-related industry location quotients. Understanding these patterns is crucial for local policymakers and stakeholders to devise targeted strategies to optimize job creation and economic growth in these counties. By identifying the specific sectors that contribute positively or negatively to the leisure and hospitality industry, these counties can make informed decisions to foster a balanced and prosperous economy.

Table 17 offers valuable insights into the dynamics of four counties with an IT employment location quotient greater than one. Notably, an increase in smart manufacturing jobs in these counties yields a remarkable 8.43 job growth in the leisure and hospitality sectors. However, it's worth noting that an increase in healthcare services jobs results in a decline in leisure and hospitality employment. Looking at the bigger picture, an increase in leisure and hospitality jobs in these counties contributes to the creation of 0.02 jobs across the four industries combined. On the other hand, when we consider the ripple effects of leisure and hospitality job increases, we observe a distinct pattern. Specifically, an increase in leisure and hospitality jobs leads to the creation of 0.04 jobs in the smart manufacturing sector, indicating a positive relationship between these two industries. However, there is a trade-off, as it also results in 0.02 jobs lost in healthcare-related industries, highlighting the delicate balance between different sectors.

Table 17. Comparative Employment Causal Relationships for Cases where Information Technology Sector Employment Location Quotient > 1 vs <1

	Information Technology LQ >1		Information Technology LQ <1	
	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality	Impact on Leisure & Hospitality	Impact of Leisure & Hospitality
Smart Manufacturing	8.43	0.04	-1.99	-0.09
Healthcare Related Industries	NS	-0.02	3.50	-0.11
Healthcare Services Industry	-3.72	NS	NS	-0.09
Information Technology	NS	NS	NS	0.03
Total	4.71	0.02	1.51	-0.26

As indicated in Table 18, which combines and summarizes the findings from Tables 13 through 18, considering the status of Cuyahoga County in all the five key industries, we can conclude that job growth in healthcare-related industries has the largest causal impact on job growth in the leisure and hospitality sectors. Figure 27 presents the sub-sectors of healthcare-related industries. Further, we note that the only sector that job growth in leisure and hospitality negatively impacts is the healthcare services sector, including ambulatory healthcare services, hospitals, and nursing home jobs. This is essential because these sub-sectors draw from the same demographic groups as the leisure and hospitality sectors for employment. Given the dwindling youth population in the county, this is a situation of concern.

According to the findings presented in Table 18, which consolidates and synthesizes data from Tables 13 through 18, we have observed a noteworthy trend in Cuyahoga County's five key industries. The analysis shows that job growth in the healthcare-related sector significantly influences expanding jobs in the leisure and hospitality industry. This correlation points towards a causal connection between these two sectors.

Table 18. Overall Causal Impacts for Cuyahoga County

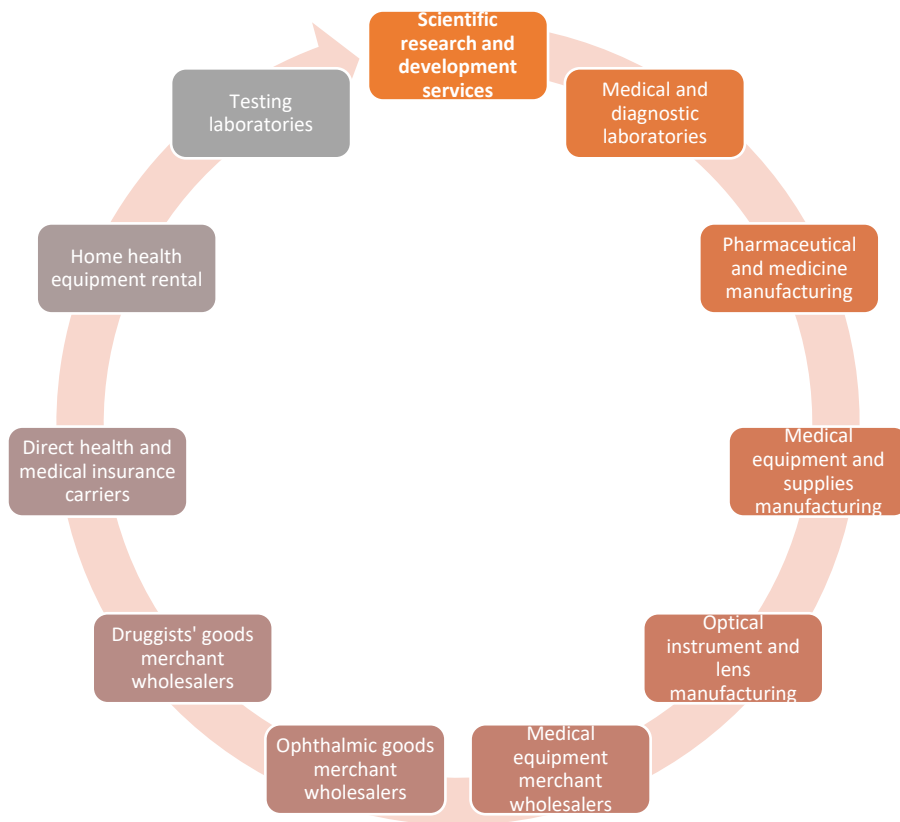
	Impact on L.H.	L.H. Impact
Smart Manufacturing	1.48	0.03
Healthcare Related Industries	3.47	0.02
Healthcare Services	-0.54	-0.03
Information Technology	-1.96	0.05

Figure 29 provides a comprehensive breakdown of the sub-sectors within the healthcare-related industries, offering valuable insights into the specific areas driving the growth of jobs in this sector. It encompasses various fields such as scientific research, testing laboratories, medical and

pharmaceutical laboratories, medical supplies manufacturing, home health equipment rental, and more. Increases in jobs within sectors such as scientific research, testing laboratories, medical and pharmaceutical laboratories, medical supplies manufacturing, and home health equipment rental can indirectly lead to increases in leisure and hospitality jobs. The growth of these healthcare-related industries creates a healthier and more prosperous population, as advancements in medical research and testing contribute to better healthcare outcomes. With improved health and well-being, people are more likely to engage in leisure activities and travel, thus boosting the demand for hospitality services.

Additionally, expanding medical supplies manufacturing and home health equipment rental may attract investment in related infrastructure, leading to developing healthcare facilities in various regions. These new facilities can stimulate tourism and business travel, increasing demand for leisure and hospitality services such as hotels, restaurants, entertainment venues, and tourism-related activities. Overall, the interconnectedness of the healthcare and leisure sectors can foster a positive cycle of job growth and economic development in both domains.

Figure 29. Jobs with the Largest Impact on Leisure and Hospitality Jobs in Cuyahoga County



Increases in jobs in smart manufacturing can lead to increases in leisure and hospitality jobs due to various factors. Smart manufacturing, which integrates advanced technologies like automation, artificial intelligence, and data analytics into manufacturing, enhances productivity and efficiency. As the manufacturing sector experiences growth boosts economic activity and creates more job

opportunities. When people secure stable employment and experience higher income levels, they tend to have more disposable income, leading to an increase in consumer spending on leisure activities, entertainment, and travel. This surge in consumer demand for leisure and hospitality services can drive businesses in these sectors to expand and hire more workers to cater to the growing number of customers.

Additionally, the rise of smart manufacturing often requires a skilled and tech-savvy workforce. As the manufacturing industry adopts new technologies, there may be a need for workers with expertise in areas such as programming, engineering, and data analysis. Some workers from other industries may seek to transition into manufacturing jobs, leaving vacancies in their previous sectors, including leisure and hospitality. Overall, the positive economic impact of smart manufacturing can create a ripple effect, fostering job growth and prosperity in the leisure and hospitality sectors.

Moreover, it is interesting to note that the healthcare services sector, encompassing ambulatory healthcare services, hospitals, and nursing home jobs, experiences a negative impact from job growth in leisure and hospitality. This may be because both sectors draw their workforce from similar demographic groups regarding employment opportunities. This alignment in the labor pool can create challenges, especially considering the county's declining youth population. Healthcare jobs often offer competitive wages and better benefits, including health insurance and retirement plans, compared to many positions in the leisure and hospitality industry. This financial incentive may encourage workers to transition from the hospitality sector to healthcare, further reducing the available workforce in leisure and hospitality. Transitioning to healthcare jobs may require additional training and education, which some workers in the leisure and hospitality sector may be willing to pursue the potential career stability and growth opportunities in healthcare. Government initiatives to improve healthcare accessibility and funding for healthcare services can spur job growth in the sector. At the same time, the leisure and hospitality industry may not receive the same level of support, leading to an imbalance in job opportunities.

Regarding the negative impact of growth in IT jobs on leisure and hospitality jobs, while this is a surprising result, increases in IT jobs can lead to decreases in leisure and hospitality jobs due to several factors. The three main reasons include automation and efficiency, skills mismatch, and technical substitution. IT advancements often lead to automation and improved efficiency in various industries, including leisure and hospitality. For example, self-checkout systems in hotels and restaurants, online booking platforms, or automated customer service processes can reduce the need for manual labor. As a result, some jobs in leisure and hospitality, such as front desk clerks or order takers, may become redundant or reduced in number. As the demand for IT jobs grows, there may be a skills mismatch between the requirements of IT positions and the qualifications of workers in the leisure and hospitality sectors. This could result in workers from the latter industry being displaced, as they might not possess the necessary skills to transition into IT-related roles. Lastly, technological advancements might create new ways of delivering leisure and hospitality services that require fewer human employees. For instance, adopting hotel robots or AI-driven chatbots for customer service can replace human labor in some industries. It's important to note that while increases in IT jobs may lead to job losses in leisure and hospitality, the overall impact

on the job market and economy will depend on various factors, including the rate of technological advancement, economic conditions, and government policies. Efforts to retrain and reskill workers affected by these changes can also mitigate some negative consequences.

Due to the aforementioned interesting job creation nexus between the industries, policies aimed at job growth may have implications for future workforce dynamics in Cuyahoga County. Addressing this issue would require thoughtful strategies to balance job growth in these vital industries while ensuring the shrinking youth population does not hinder their development. By doing so, the county can continue to thrive economically and provide meaningful opportunities for its residents across various sectors.

In summary, our analysis reveals significant insights into the relationship between leisure and hospitality jobs and employment location quotients in various sectors across counties. For those counties with an employment location quotient greater than 1, we observe a positive correlation between increases in leisure and hospitality jobs and job growth in the five sectors under consideration. This indicates a strong interdependence between the leisure and hospitality industry and other sectors, implying that its growth positively influences employment opportunities in the broader economy.

However, the dynamics shift for counties with employment location quotients of less than one. In these cases, we find that increases in leisure and hospitality jobs lead to increased employment in counties with higher employment location quotients for healthcare-related industries, healthcare services, and leisure and hospitality. This suggests that in counties where these sectors are already well-established and specialized, the growth of the leisure and hospitality industry complements their development and contributes to overall job creation. Conversely, for counties with low location quotients in smart manufacturing and IT, increases in leisure and hospitality jobs result in a decline in overall job creation across the five sectors. This highlights the importance of considering each county's economic context and industry specialization when analyzing the impact of leisure and hospitality job growth.

These findings emphasize regional economies' complex and interconnected nature and underscore the need for tailored and strategic approaches to foster economic growth and job creation. By recognizing the distinct patterns of interdependence between industries, policymakers, and stakeholders can make informed decisions to promote balanced and sustainable economic development in their respective counties. This comprehensive understanding of the dynamics at play will be crucial in unlocking the full potential of the leisure and hospitality sector and its impact on broader economic prosperity.

5. RESTAURANT OWNER/MANAGER AND STAFF SURVEYS & INTERVIEWS

5.1 Survey/Interview Methodology

The study included the development of a database of hospitality and leisure establishments in Cuyahoga County to use to conduct a survey of staff, owners, and managers. The BW Community Research Institute partnered with the BW Ratcliffe Growth Practice. This undergraduate internship program trains a small group of students to develop market research projects for area businesses and nonprofit organizations. The students used a list of establishments provided by Sean Watterson as the foundation for creating a database of establishments used to conduct surveys and interviews. Table 19 provides the totals for each type of establishment in the database. The survey and interview component focused on food/beverage locations and entertainment venues (highlighted).

Table 19. Hospitality and Leisure Establishment Database Summary

Type of establishment	Number in database
Bars, restaurants	157
Fast/Casual food/beverage	89
Multicultural restaurants	79
Breweries, distilleries	32
Wineries	24
Music and comedy venues	14
Accommodations	16
Destination venues (e.g., parks, theaters, museums, galleries, sports, festivals)	74
Hospitality & Leisure education and training organizations	17

Note: The establishment database, including contact information, can be accessed by contacting Dr. Tom Sutton at tsutton@bw.edu.

Preliminary phone, email, and social media outreach to establishments by the Growth Practice took place during the period of May 1 – 26. In June, a new cohort of seven Growth Practice students conducted field visits to establishments in Berea, Fairview Park, and the Cleveland neighborhoods of Asia Town, Clark-Fulton, Kamms Corner, Ohio City, and Tremont. The students also conducted surveys by phone during the period of June 5 – July 21. The results of these efforts are summarized in Table 20.

Responses to outreach efforts were mixed. While over 100 establishments agreed to distribute the survey to their staff, only 27 resulted in at least one owner, manager, and/or staff participation. The research team found that the optimal time to contact establishments was between 2:00 – 4:00 pm during weekdays. However, even with contacts that agreed to take the survey and/or distribute it to staff, there was little response, despite the incentive of the five \$50.00 Target/Walmart gift cards raffle for respondents who completed the survey. It became clear that owners and staff are consistently busy, with little time or attention available to participate in the research.

Table 20. Establishment Outreach and Results

Type of contact and result	Number
Establishment phone contacts	315
Walk-in visits	75
Completed owner-manager interviews/surveys	27
Completed staff surveys	52

Figures 30 and 31 show the locations of completed owner interviews and staff surveys across Cuyahoga County and Cleveland:

Figure 30. Cuyahoga County Completed Interview Locations

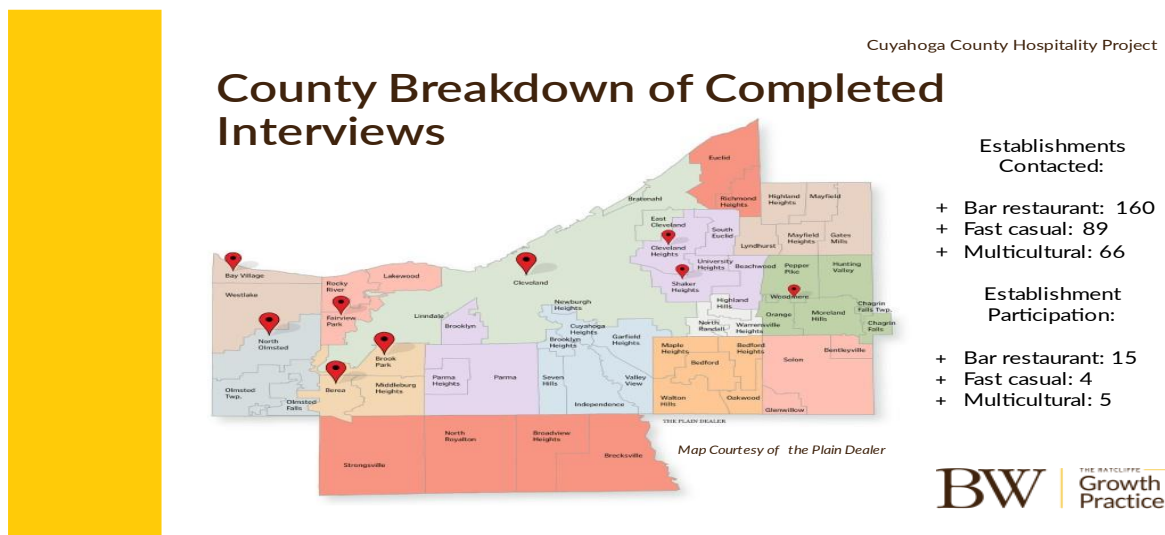


Figure 31. Cleveland Completed Interview Locations



5.2 Owner-Manager Survey and Interview Results

Establishment Profiles

The sample of establishments participating in the surveys and interviews had been in business for several years and had moderate-high staffing levels. According to Figure 32, Multicultural establishments have an average of nine staff and have been in business for 12.3 years. Fast casual establishments also had an average of nine staff and had been in business for an average of 13.8 years. Bar/restaurants in the study had a larger average staff of 21 and a longer tenure averaging 25.7 years.

Figure 32. Restaurant Employment Data

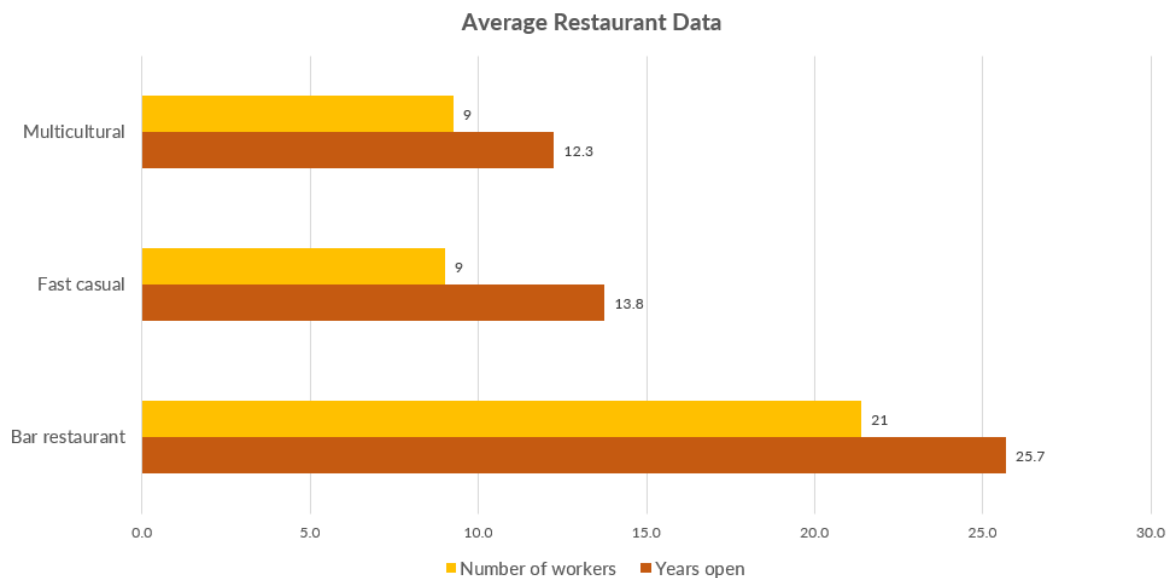


Table 21. How long has your establishment been in business?

less than one year	7.4%
1-3 years	11.1%
4-6 years	25.9%
7-10 years	22.2%
11-15 years	0.0%
more than 15 years	33.3%
Total	27

Smaller establishments represented the majority of staffing, as indicated in Table 22. In the column of ‘1-5 staff,’ the overall staffing ranged from 57.7% with kitchen staff to 94.7% with bussers in this category. Only 3.8% of the sample had more than 15 kitchen staff.

Table 22. How many staff in each type of position (kitchen, servers, bartenders, etc.) work here?

	1-5	6-10	10-15	more than 15	Total
Kitchen	57.7%	23.1%	15.4%	3.8%	26
Servers	69.6%	21.7%	8.7%	0.0%	23
Bussers	94.7%	5.3%	0.0%	0.0%	19
Host/hostesses	80.0%	20.0%	0.0%	0.0%	20

According to Table 23, the most common customer type is families at 25.9%, while a larger 44.4% identified a mix of customers as typical of their establishments. This indicates that the sample is comprised largely of general types of establishments that are not seeking to target particular customer demographics.

Table 23. Which of the following would you consider your typical types of customers?

families	25.9%
young singles and couples	7.4%
older singles, couples	22.2%
a mix of all of the above	44.4%
Total	27

Figure 33 indicates that establishment owners' primary challenges are the cost of goods, staffing costs, recruitment and retention, and a consistent flow of customers. According to Table 24, 21.7% of respondents identified rising costs as a challenge, followed closely by 20.3% indicating staffing costs as a challenge. The 20.3% identifying staff recruitment and 17.4% staff retention as challenges are aligned with this finding.

Figure 33. Owner Business Challenges

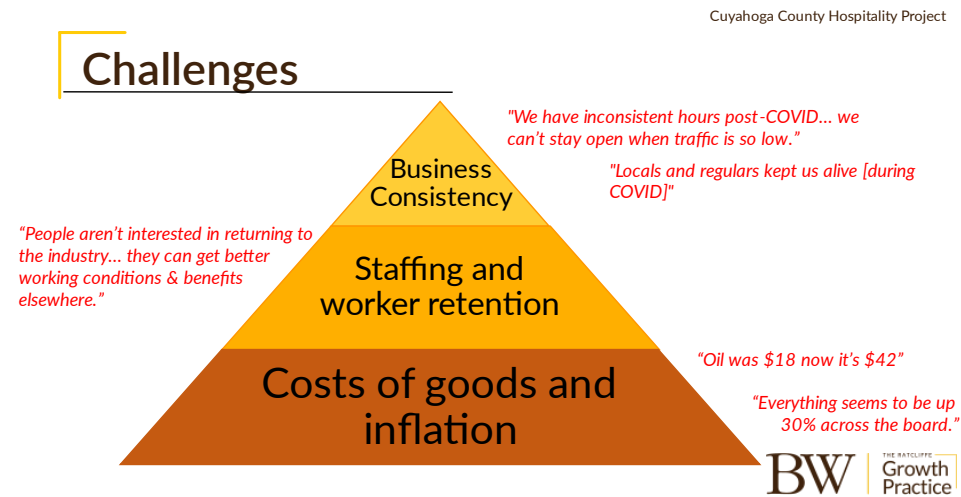


Table 24. What challenges do you face in keeping your business going? (please check all that apply)

staff recruitment	20.3%
staff retention	17.4%
rising staff costs	20.3%
rising supply costs	21.7%
reliable supply delivery	5.8%
marketing	4.3%
facility costs (rent, utilities, taxes, etc.)	10.1%
loss of office-based customers now working remotely	0.0%
Total	69

Tables 25 – 27 indicate that owners are optimistic about future growth but are divided in how much they have recovered from the effects of Covid-19 on their businesses. 44% said they fully recovered, while 48% said business was still below pre-Covid levels. However, 83% indicated that they see growth in the next three years, including 33% that see expansion to new locations. Effects on their business growth were led by customer choices for dining and entertainment (18.5%), staff recruitment and retention (13.8%), labor (13.8%), and supply costs (16.9%).

Table 25. Please describe how your business is doing now compared with 2-3 years ago at the height of the Covid-19 lockdown.

fully recovered from before Covid and growing	20.0%
fully recovered from before Covid and stable	24.0%
still recovering; the amount of business is still below the pre-covid level	48.0%
ours opened after the end of Covid restrictions	4.0%
not sure	4.0%
Total	25

Table 26. Where do you see your business three years from now? (growing; same size; possibly smaller; may no longer be in business) What factors do you see involved in this prediction?

growing at this location	50.0%
growing and expanding to new locations	33.3%
remaining about the same amount of business	8.3%
having less business but still functioning	0.0%
may no longer be in business	8.3%
Total	24

Table 27. What factors affect how you see the future of your business? (please check all that apply)

customer choices of places to dine and/or be entertained	18.5%
ability to recruit, train and retain reliable staff	13.8%
changes in labor costs	13.8%
changes in supply costs	16.9%
willingness of customers to pay higher prices	4.6%
ability to access business loans	6.2%
neighborhood safety	6.2%
parking availability	7.7%
other (see below for comments)	12.3%
Total	65

Other factors affecting the future of your business:

Trying to attract customers from surrounding neighborhoods.

Want's to keep/gain control of the property his restaurant is on. Allow for expansion of current restaurants if they don't open another.

Interest in adding on a patio and kitchen renovations. May be a lack of space to accommodate either of these.

Renovation costs.

Expanding more hours - currently only open in the evening: wants to expand to lunch times.

Doesn't fear competition - "I have to gear up for the restaurant war." - "If you're not gonna be a doctor, a lawyer, or got to school for these other things, then you are going to go into the restaurant business." - Employees don't care about their work they just care about getting by. - "It has to be about public-private partnerships these days," talking about the structure of business.

Ability to incorporate online ordering - "Continuing to listening to what customers are asking for."

Rising costs in debt fees.

A few owners provided information about their business gross revenue and profit margins. Tables 28 and 29 show that four respondents reported annual gross revenue between \$50,000 - \$250,000, while three reported annual gross revenue between \$500,000 and \$5 million. Two had profit margins between 1%-5%, two between 5%-10%, and one at more than 10%.

Table 28. If you are willing share this information, what is your approximate annual gross revenue?

If you are willing share this information, what is your approximate annual gross revenue?	Percentage
less than \$25,000	11.1%
\$25,000 - \$50,000	11.1%
\$50,000 - \$100,000	22.2%
\$100,000 - \$250,000	22.2%
\$250,000 - \$500,000	0.0%
\$500,000 - \$1,000,000	11.1%
\$1 million - \$5 million	22.2%
more than \$5 million	0.0%
Total	9

Table 29. What is your profit margin?

	Percentage
1% - 5%	40.0%
5% - 10%	40.0%
more than 10%	20.0%
Total	5

Tables 30a and 30b shows that 32% of owners belong to one or more business associations such as a local chamber of commerce and/or community development corporation. Types of support mentioned include hosting job recruiting events, business promotion, and providing resources.

Table 30a. Do you belong to one or more associations or groups such as a local chamber of commerce or an industry association that supports your business?

yes	32.0%
no	60.0%
not that I am aware of	8.0%
Total	25

Table 30b. How has this group been helpful to your business?

Helps with job/recruiting fairs and getting the name out there. Also helps allow Edwins to be able to act as an "incubator" to help other local organizations begin to grow

YMCA board member Special improvements board for Kamms Corner development Kiwanis YMCA is the biggest supporter Development corporation will stop in.

Hispanic business center Building hope in the city MetroWest Got involved by saying yes, word of mouth, looking into different things. They help by hosting things here and providing resources and involvements.

Belongs to the Cleveland Independents group that supports over 50 locally-owned restaurants. The organization assists with marketing as well as offers specials on certain weeks like specialty drinks or "burger weeks."

Ohio Restaurants Association & Chamber of Commerce are helpful - did not go into detail about it.

Helpful with a good meeting schedule and enough time to get your bearings before meetings.

Works with local influencers that help to promote the business.

Relationship with local government

The majority of respondents in Figure 34 (65%) indicated a positive relationship with the local government. Positive comments in Table 28 included praise for the accessibility of two Cleveland councilpersons, the responsiveness of the Berea and Bay Village government staff, and the approach of the Cuyahoga County Health Department to help businesses meet standards and minimize the use of penalties. 19% of respondents were neutral (little interaction with local government), and 16% had negative views of local government (lack of support, hard to reach, need for services).

For businesses in Cleveland, an important role is played by community development corporations (CDCs) such as Tremont West and Midtown Cleveland. Interviews with Montserrat Monterrubio, Small Business Coordinator for Tremont West, and Naomi Jia, Asia Town Coordinator for Midtown Cleveland, found that these organizations serve as liaisons between Cleveland City Hall and the small business community. City funding for local development is funneled through CDCs to local businesses and start-ups. CDCs provide educational support and assist with applying for small business loans and grants.

CDC staff have strong local community connections and serve as ‘eyes and ears’ for the public sector to learn and act on the needs of local businesses. Naomi Jia described advocating with meal delivery services to provide drivers who spoke Chinese to serve Asia Town restaurants and residents. Ms. Jia discussed the challenges of neighborhood change, safety, and supporting the passing on of family-owned restaurants to a new generation. Montserrat Monterrubio discussed helping business owners register with a new system of the federal government in order to qualify for small business loans. Her office also works with developers to identify space for new businesses.

Figure 34. Owner perspectives on relationship with local government

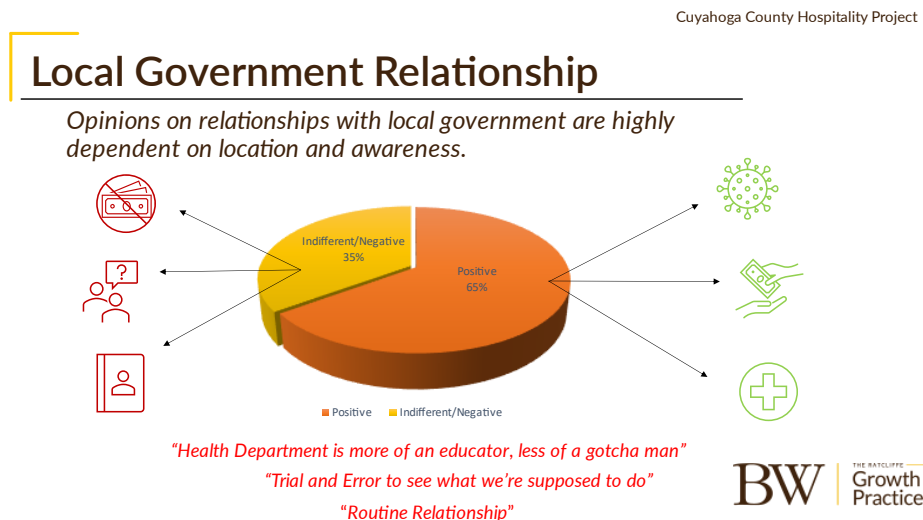


Table 31. How would you describe your relationship with local government (Building and Zoning, Health Department)? Has the local government been helpful in supporting your business? Why or why not?

Relationship with local government is good, however, she wasn't sure which local organizations her cousin belonged to.
Good relationship, work with health departments, do a lot of building with the city (help build restaurants)
A good relationship with local government, but not too much as this is a corporate organization.
Berea local government is fantastic and they support her 100%. Was given \$2,000 grants to keep business open during COVID. Local government provides advice on how to support businesses at all times. Berea has a business grant program where the first year they pay 15% of rent and pay 50% for a front sign.
Great relationship with government No problems, both cooperate with one another
Local government has been mostly helpful No problems related to dealing with local government
No relationship with local government does not feel the need to have a relationship since they are a small business.
Stated that they have a really good relationship with local government, and that they were very helpful during the pandemic.
Not really a relationship there, because of very little support from the government. Just has been the owner and his money.
Good relationship with the councilman and can text him at any time Cops new commander is supportive No one is terribly proactive as they used to be because they are juggling a lot
Local government does not have a huge part in what is going on Want all the businesses to come together. Has received no funding from local government and everything has been out of pocket.
Councilwoman and local non-profit organization helps a lot - Jasmine Santana. Uses services and space for meetings. Has gotten interviews and referrals for publicity. A referral
Yes, they're always checking and helping us to improve.
The local government is already very supportive Mayor and other officials of Bay Village helped with the opening. Locals and other businesses are supportive. "Big melting pot of people." Local news outlets and newspapers wanted to cover the opening of the restaurant.
Great relationship with local government and that they have been super helpful in supporting their business. They have also been given multiple grants that were helpful.
Positive relationships with local government and government agencies. Cuyahoga County is great with their health department (better than other counties he has dealt with) - "The health department acts more as an educator and less of a "gotcha-man."
Seems like currently there is hardly ever anyone at the local governmental offices or do not respond to inquiries for assistance. Leaves restaurant up to fend for themselves and not be able to ask questions when needed to local officials "Trial and error to see what we're supposed to do"

Routine relationship; not sabotaging the business but not helping in any major. A continued opportunity to apply for funds would be great, as they were applying for them but not getting much help.

Positive relationship with local government - "They aren't overly helpful, but not something that makes things difficult."

Very positive relationship with local government - very helpful during COVID: bought hundreds of meals from restaurant to feed elderly, helped fund business renovations through PPP loans, set up Restaurant Revitalization Program, easy to get permits for renovations & different things. Great relationship. Been helpful in redoing their patio and looking to expand with a roof deck (dealt with building and zoning).

Relationship with Berea/Brookpark government is positive. Also have a positive relationship with Cuyahoga County.

Not the greatest because the business is not getting a lot of help. However, did receive grants but for only a staff of 6 people. The pre-pandemic staff was 16 workers.

No real relationship with local government. "I don't really have an answer or opinion on this"

Not the greatest. No acknowledgment of the problem and cannot keep walking around pretending that everything is fine. Offered some grants during COVID but they were only between \$1,000-2,000. Taxes and penalties put on debt were not needed to be charged during COVID. It actually hurt more. I am paying double my taxes just in penalties.

No one has been around to offer any support. They just focus on Downtown Cleveland.

Establishment owners identified four areas of supported needed from the public sector to help them succeed: marketing, financial assistance, more direct engagement of local government staff, and development of an accessible central hub with resources, FAQ responses and business education (see Figure 35). Suggestions from Tables 29 and 30 included provision of marketing, partnerships with schools, renewal of the storefront renovation program, more connections of neighborhoods with downtown Cleveland, more focus on neighborhood safety and street cleanliness, and incentives to encourage senior citizens to visit establishments.

Figure 35: Owner Support Needs



Table 32. How could local government be more helpful in supporting your business?

Help keep up with the maintenance of the square He felt as if the city of Cleveland often forgets the square is a part of CLE Reach a national level; he kept saying restaurants staple to the economy and contributes to the growth of everything Marketing needs to push news to spread news where to eat.

Quicker response from police to assist with homeless trying to stay in establishment.

Keep doing what they are doing.

Looking to partner with schools or other organizations to sponsor events, outings.

financially giving more opportunity for growth.

Want more pro-business programs whether that is financial or a storefront renovation program Went through the storefront renovation when they first opened but now 17 years have passed and it is only for first time tenets Want to grow and rebrand the program so anyone not just first timers can apply Felt forgotten post covid since now the interest is in new businesses rather than existing ones Lacking consistency but understand they are wearing a lot of hats Could be helpful to have organized meetings between business leaders to share updates, successes, ideas Help to form more of a social community in Kamm's Corner.

Wants more out of the local government Wants the main street to be kept up with More support for businesses Enforce something like a cleaning rule They put the time and energy into putting up Christmas lights but not cleaning and upkeeping the main street Get no real answers from the local government.

"Come see for yourself." You can't help a situation you know nothing about. Immersing yourself in the city + knowing the community. Come and join the community and walk around. If you walk around and get to know a community, then you can try to help it. Cannot say "tell me what works and what doesn't." Need to go and see so you can "take care of them right." Community leaders can see there is well more here than what meets the eye. "We don't have big things, but we have something." Boots on the ground approach. Making applications easier to understand for people who don't have the luxury of higher education. Grants are designed to help people with money. Not for people who don't have money. People don't take advantage of resources because they just don't know. "I just didn't know."

No connection to Downtown Cleveland. 20-25 minutes out from Downtown. "Downtown may not want to associate with a small locally owned business, they already have enough going on." Connections to downtown could be helpful to expand customer base.

Local government could be more helpful in ways - did not specify in depth. Cited health insurance and more education on how easy it is to qualify for county health insurance.

Establishment of a central hub would be most useful to be able to go to for questions Simple FAQ area could also be helpful too as with the renovation process, managers currently do not know the permits needed or other required paperwork.

Give out \$20-100 coupons to senior citizens of the community for them to get out and go to more local restaurants. Reimburse some restaurants renovation costs for them to try and diversify/expand.

"I'm not totally sure how they could help us further."

Doesn't feel like the government can be more helpful. - "Once your business is established you really don't need the help of government."

Continue to give them opportunities to expand and have freedom with the business.

No need for more help. Thinks government does enough.

Acknowledgement of the problem would be great. Additional assistance including lessening the tax burden would help. Since interest and penalties doubled the restaurants debt, some relief would be great.

Local government could help with certain safety concerns surrounding the restaurant (did not elaborate on issues) - Said they could help in "many ways."

Relieving sales taxes. Additional assistance to lessen tax burden, just help out anyway they can.

Giving support on marketing businesses other than downtown Cleveland.

Figure 36. Need for a Hospitality and Leisure Sector Office

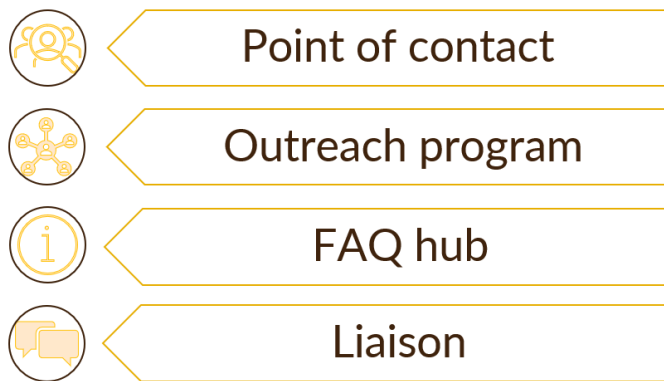


Table 33. Would establishing an office in local government that promotes and provides help to businesses like yours be beneficial?

yes	58.3%
Maybe	16.7%
No	25.0%
Total	24

Table 34. What would you need from such an office?

Office could definitely help. "All restaurants in the city need help." "needs to be a bigger push for helping hospitality industry."

Greater response times from Cleveland Police with a greater number of officers on staff at a time.

Local government does a good job already.

Office would be beneficial, especially for marketing aspects. "One office where everyone can help support each other" His grandfather tries to go around and help restaurants within local area to try and help them out, said an office would be great to help support everyone.

Yes, believes an office in local government would be very helpful, said that it would be nice to have a main point of contact for any problems/concerns.

Office: Absolutely a need. Hispanic Business Center, Urban League, Woman Boss is what she works with now. Anything that is willing to be used is helpful. Resources are very helpful that she must find. Office needs: How to brand your business. Will offer to do it herself. How to open a business, how to run a bank account etc. Access to knowledge on business. How to run a business. Would love to have a place that will start you fresh. An office that offers step by step instructions on how to obtain loans, grants. A step by step would have been great, she would have loved that at the time. For people in the situation, a point of contact and person will be helpful. Should be bilingual, multicultural people who love to work with their hands Learned how to do some of this in school but was doing this before, "but I didn't know." Needs now: MEDIA + marketing. So hard for her to do everything. Types of marketing: website, taggable, order off of it. Constant pictures or ads moving without her just doing it. Place where people can see her catering. "Can't afford to pay someone." Not that she doesn't want it, she doesn't have the capacity. Has photos but no time. A template on how to do so would be beneficial. Could help her be good at it because it takes her a long time. "I'm a chef, I took IT classes, but I don't know how to do it (marketing)." "that's more valuable than money." It's something I'm not good at I can take \$1000 and spend it on food but marketing is still behind. I would absolutely pick marketing over money.

The local government has already been very helpful, so not sure if such an office is necessary.

Pleased with local government support.

Did not touch on this -- already seemed very satisfied with what they do.

The establishment of a central hub to go to for questions would be very helpful. Need to be able to get answers easily on how to get permits and comply with city codes. Looking to just have someone from the city or local government that is readily available to assist in processes or answer any questions.

Fit the needs of the local people. Reimburse businesses that make changes to attract more of the community.

Thinks that an office in local government could help with supporting business marketing. Wants more help with marketing the business.

Does not think a new office in government is very necessary - cited that only if it helped with cutting down on paperwork.

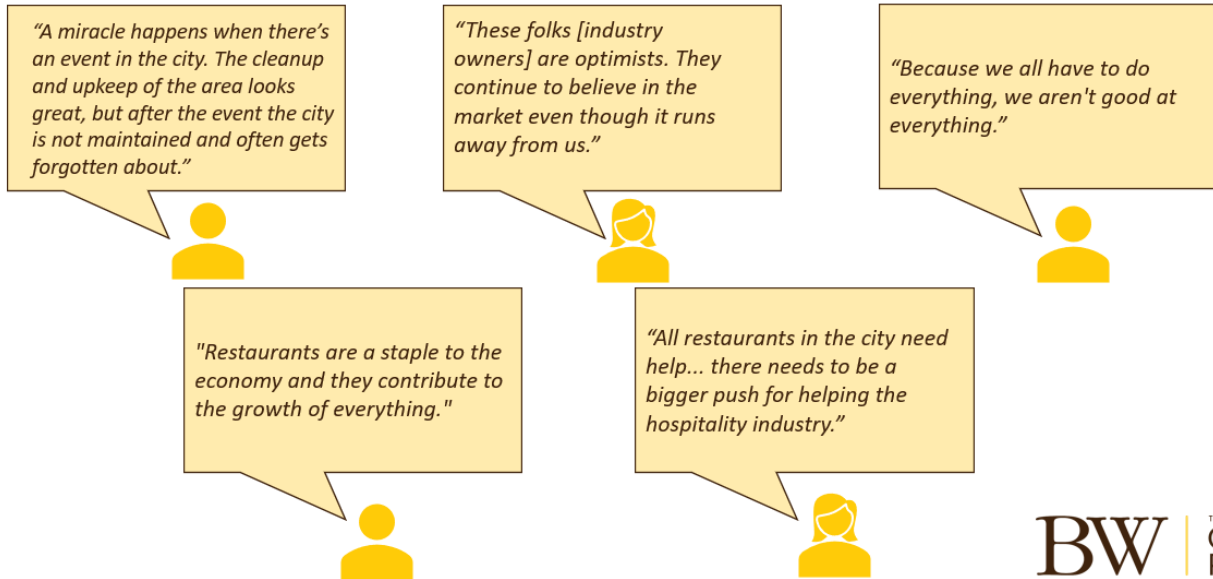
Create an outreach program and find out where the community wants to improve.

No need for support - kind of adverse to it - "Every business owner should control their own business. It's on you to do things to yourself."

Help out in any way they can, mainly with taxes.

Thinks establishing an office in local government would help. - Could allow for more connection between the restaurant industry and government. Marketing, Promotions.

Figure 37. Summary voices of business owners



5.3 Hospitality Staff Interview Data

5.3.1 Respondent Work Profiles

There were seventeen communities with establishment locations from which at least one staff survey was submitted (Table 35). The establishments were primarily full service (46%) and fast casual (36%) restaurants, followed by bars (11%) (Table 36). 25% of respondents are servers; 16% are host/hostesses; 14% are shift managers; positions in the back of the house (23%) (Table 37).

Respondent tenure in the restaurant industry was most typically 1-5 years (38%), followed by 6-10 years (29%) and more than 10 years (27%) (Table 41). 73% of respondents have worked in other jobs outside of the restaurant industry in variety of positions, including child care, construction, retail, and related hospitality establishments (Table 42). 27% of respondents are attending college or a training program. Of these, 33% are attending community college, 58% are in a four year college/university, and 8% are in a training program (Tables 43a, 43b). 22% of respondents are working a second job (Table 44).

Table 35. Establishment locations where respondents work

Akron	Berea (10)	Kamms Corners (3)	North Olmsted	Parma (2)	Tremont (CLE) (3)
Asia Town (CLE)	Cleveland (5)	Larchmere (CLE) (3)	Ohio City (CLE) (2)	Rocky River (2)	West Park (CLE) (6)
Avon	Fairview Park (7)	Moreland Hills	Old Brooklyn (CLE)	Shaker Heights (3)	

Note: 27 establishments had at least one participant in the survey and/or owner/manager interview; duplication of sites is due to multiple respondents per establishment.

Table 36. Types of establishments

Which of the following best describes the establishment where you work?	Percentage
Full service restaurant	46.20%
Fast/casual restaurant	36.50%
Take out only food service	3.80%
Bar	11.50%
Nightclub	1.90%
Catering business	0.00%
Brewery or distillery	0.00%
Winery	0.00%
Total	52

Table 37. Respondent employment roles

Which of the following best describes your role? (please select all that apply)	Percentage
Host/hostess	15.80%
Shift manager	13.90%
Server	24.80%
Bartender	7.90%
Busser	4.00%
Kitchen cleaning/dishwashing	7.90%
Cook	10.90%
Chef	4.00%
Other: (5 owners, 2 general managers, barback, 1 take-out orders)	10.90%
Total	101

Table 38. Average weekly work hours

What is the average number of hours you work each week at this establishment?	Percentage
5-10 hours	9.60%
11-20 hours	9.60%
21-30 hours	25.00%
31-40 hours	34.60%
over 40 hours	21.20%
Total	52

Table 39. Respondent working hour preferences

Which of the following do you prefer?	Percentage
More assigned hours each week	17.30%
Less assigned hours each week	11.50%
No change - I am satisfied with the number of hours I am working	71.20%
Total	52

Table 40. Respondent length of employment

How long have you worked at this establishment?	Percentage
less than 3 months	21.20%
3-6 months	13.50%
6 months - 1 year	7.70%
1-4 years	36.50%
5-7 years	9.60%
8-10 years	5.80%
more than 10 years (please provide approximate number)	5.80%
Total	52

Table 41. Respondent tenure in hospitality industry

How long have you worked in the restaurant industry?	Percentage
1 year or less	5.80%
1-5 years	38.50%
6-10 years	28.80%
more than 10 years (12, 15, 15-20, 20 (2), 23, 42)	26.90%
Total	52

Table 42. Employment outside of restaurant industry

Have you worked in other jobs outside of the restaurant industry?	Percentage
Yes	73.10%
No	26.90%
Total	52

Jobs listed: Radio Station, mortgage loan officer, truckdriver (2), beauty industry/Salon, retail (4), warehouse (2), programming, bakery, economic development, public relations, construction (2), movie theater, cafe/coffee shop (2), bartender, business entrepreneur, child care (3), police and 911 dispatch, early childhood education, oil drilling, power plant, ice cream shop, legal assistant, dance teacher, hotel manager, secretary/receptionist.

Table 43a. Respondents attending school or training program

Are you currently attending school or a training program?	Percentage
yes	26.90%
no	73.10%
Total	52

Table 43b. Types of education/training

What type of education and/or training? (please choose all that apply)	Percentage
Community college	33.30%
Four year college/university	58.30%
Vocational training program (please list type of profession)	8.30%
Total	12

Table 44. Respondents with second jobs

Are you currently working at a second job?	Percentage
Yes (another restaurant (6), retail-clothing store, tourism, trucking)	21.60%
No	78.40%
Total	51

5.3.2 Work Environment Satisfaction

Respondents were asked about satisfaction with shift scheduling, perceptions about their workplace, and benefit priorities. 67% said that shifts are scheduled at the end of each week, while 17% are assigned every two weeks, and 15% are set up on one month intervals (Table 45). 75% of respondents are ‘somewhat’ or ‘extremely’ satisfied with their shift schedules (Table 46), while 63% indicated that it was ‘somewhat’ or ‘extremely’ likely that a shift change could be arranged quickly to handle a personal situation (Table 47).

Table 48 shows that 87% of respondents are satisfied with their employment. 98% agree that they have a safe work environment. 96% employees are appreciated for good work. While 85% said they enjoy working with their customers, 78% said they occasionally deal with difficult customers. 78% indicated that they ‘make enough money to meet my needs.’ At the same time, half of respondents have experienced increased work-related stress since the pandemic. 22% indicated

that the demands of their job interfere with their ability to take care of family or home responsibilities.

According to Table 49, the top three benefit priorities for respondents (chosen as ‘very’ or ‘somewhat’ important) are good wages (100%), flexible hours (93%), and meaningful work (93%). 74% chose career advancement, while 69% chose paid time off. Benefits such as medical & dental insurance were important to 66% of respondents, while 61% prioritize a retirement plan. The least prioritized benefit was accessible, affordable childcare, chosen by 41% of respondents. This may correlate with only 28% of respondents having one or more children at home (Table 62).

Table 45. Shift assignment scheduling

When do you get shift assignments?	Percentage
At the end of the week for the following week	67.40%
Shifts are assigned for two-week intervals	17.40%
Shifts are assigned for one-month intervals	15.20%
Total	46

Table 46. Respondent satisfaction with shift schedules

How satisfied are you with the shift schedule?	Percentage
Extremely dissatisfied	8.70%
Somewhat dissatisfied	13.00%
Neither satisfied nor dissatisfied	13.00%
Somewhat satisfied	34.80%
Extremely satisfied	30.40%
Total	46

Table 47. Ability to change shifts

How likely is it that you can change a shift quickly to handle a personal situation?	Percentage
Extremely unlikely	8.70%
Somewhat unlikely	15.20%
Neither likely nor unlikely	13.00%
Somewhat likely	32.60%
Extremely likely	30.40%
Total	46

Table 48. Respondent workplace perceptions

How much would you agree or disagree with the following statements?	strongly agree	agree	disagree	strongly disagree	no opinion
My employer provides a safe work environment	73.90%	23.90%	0.00%	0.00%	2.20%
Employees are appreciated for a job well done	58.70%	37.00%	2.20%	0.00%	2.20%
I enjoy working with our customers	43.50%	41.30%	4.30%	4.30%	6.50%
I occasionally deal with difficult customers	34.80%	43.50%	15.20%	0.00%	6.50%
I make enough money to meet my needs	28.30%	47.80%	15.20%	4.30%	4.30%
I have experienced an increase in stress at work since the pandemic	28.30%	21.70%	32.60%	0.00%	17.40%
The demands of my job interfere with my ability to fulfill family or home responsibilities	8.70%	13.00%	58.70%	15.20%	4.30%
I am satisfied with my current employment situation	39.10%	47.80%	6.50%	2.20%	4.30%

Table 49. Respondent workplace benefit priorities

How important to you are each of the following?	Very important	Somewhat important	Not very important	Not at all important
A good wage	80.40%	19.60%	0.00%	0.00%
Flexible hours	73.90%	19.60%	4.30%	2.20%
Opportunities for career advancement	43.50%	30.40%	17.40%	8.70%
Meaningful work	57.80%	35.60%	4.40%	2.20%
Paid time off	37.80%	31.10%	28.90%	2.20%
Medical and dental benefits	45.50%	20.50%	22.70%	11.40%
Retirement plan	40.90%	20.50%	27.30%	11.40%
Accessible, affordable childcare	25.00%	15.90%	18.20%	40.90%

5.3.3 Hospitality Staff Survey Respondent Demographics

74% of respondents live in west side communities of Cuyahoga County (Table 50). 63% identify as female, 33% as male, and 5% as non-binary (Table 51). 64% are between the ages of 18-35; 24% are in the 36-55 age range, while 5% are under 18 and 7% are over 55 (Table 52). 79% of respondents identify as white/non-hispanic, 7% white-hispanic, 2% Black/African-American, 7% Asian-American, and 5% multiracial (Tables 53-54). 67% have some college or a degree; 7% have vocational training, and 21% have a high school degree (Table 55). Only 7% indicated that English is not their first language (Table 56).

For annual household income, 44% have an income above \$50,000, 34% have an income between \$30,000-\$50,000, and 18% have an income between \$15,000-\$30,000 (Table 57). 78% of respondents have one or more adults contributing to household income, while 10% have one or more adults providing unpaid child or elder care in the household (Tables 58-59). 57% of respondents are single, while 71% have 2 or more adults living in the household (Tables 60-61). 28% of respondents have one or more children in the household, including 8% with three or more children (Table 62).

Table 63 lists public benefits that may be received by the respondent and/or a member of their household. With only 14 responses, the table provides only partial data. The most common benefits chosen by respondents were Medicare (29%), SNAP (21%), Medicaid (14%), and Social Security retirement (14%). 7% of respondents indicated that unemployment compensation, Social Security Disability, and/or Social Security Survivors benefits are received by one or more individuals in their households.

Table 50. Respondent residential communities:

Akron	Chardon	Lakewood (7)	North Olmsted	Stow
Berea (7)	Cleveland (13)	Lorain	Parma	
Brooklyn	Cleveland Heights	Macedonia	Rocky River	
Brunswick	Fairview Park (6)	Maple Heights	Shaker Heights (2)	

Table 51. Respondent gender identification

What is your gender identity?	Percentage
Female	62.80%
Male	32.60%
Non-binary	4.70%

Table 52. Respondent age

What is your age?	Percentage
under 18	4.80%
18-25	52.40%
26-35	11.90%
36-45	16.70%
46-55	7.10%
56 or older	7.10%

Table 53. Respondent race/ethnicity identification

What is your race/ethnicity?	Percentage
Black/African-American	2.40%
White non-Hispanic	78.60%
Asian-American/Pacific Islander	7.10%
Native American	0.00%
Multiracial	4.80%
Something else	7.10%

Table 54. Respondents identifying as Hispanic/LatinX

Are you of Hispanic/LatinX origin?	Percentage
Yes	6.80%
No	92.90%
Not sure	2.40%

Table 55. Respondent educational attainment

What is your level of educational attainment?	Percentage
less than high school	4.80%
High school diploma or GED	21.40%
Vocational training and/or apprenticeship	7.10%
Some college	35.70%
Bachelor's degree	31.00%
Graduate work/degree	0.00%

Table 56. Respondents with English as first language

Is English your first language?	Percentage
Yes	92.90%
No	7.10%

Table 57. Respondent estimated annual household income

What is your estimated annual household income?	Percentage
less than \$15,000	0.00%
\$15,000 - \$20,000	10.50%
\$20,001 - \$25,000	7.90%
\$25,001 - \$30,000	3.20%
\$30,001 - \$35,000	13.20%
\$35,001 - \$40,000	10.50%
\$40,001 - \$50,000	10.50%
\$50,001 - \$75,000	10.50%
more than \$75,000	23.70%

Table 58. Adults in household contributing income

How many adults (18 or older) contribute to your household income?	Percentage
0	22.00%
1	22.00%
2	51.20%
3 or more	4.90%

Table 59. Adults in household providing child/elder care

Is there anyone in your household that provides regular unpaid child or elder care for your household?	Percentage
Yes	9.80%
No	90.20%

Table 60. Marital status

What is your current marital status?	Percentage
single	57.10%
living with a partner	23.80%
married	14.30%
divorced	4.80%

Table 61. Adults in household

Including yourself, how many people ages 18 and over live in your household?	Percentage
0	12.20%
1	17.10%
2	34.10%
3 or more	36.60%

Table 62. Children in household

How many children under the age of 18 reside in your home?	Percentage
0	72.50%
1	12.50%
2	7.50%
3 or more	7.50%

Table 63. Public benefits received by respondent households

Have you or anyone in your household received any of the following in the last 12 months? (please check all that apply)	Percentage
Unemployment compensation	7.10%
Workers Compensation payments	0.00%
Temporary Assistance for Needy Families (TANF)	0.00%
SNAP (Food stamps)	21.40%
WIC	0.00%
Medicare	28.60%
Medicaid	14.30%
Housing assistance	0.00%
Social Security Disability	7.10%
Social Security Survivors	7.10%
Social Security Supplemental Income	0.00%
Social Security Retirement benefit	14.30%
Total	14

References

Juodis A., Karavias Y., Sarafidis V. 2021. A homogeneous approach to testing for Granger non-causality in heterogeneous panels. *Empirical Economics* 60: 93–112.

<https://doi.org/10.1007/s00181-020-01970-9>.

Appendix A: List of Entertainment Entities in Cuyahoga County

Museums in Cuyahoga County

1. The Cleveland Museum of Art
2. Cleveland Museum of Natural History
3. Rock & Roll Hall of Fame
4. Great Lakes Science Center
5. Cleveland History Center
6. The Children's Museum of Cleveland
7. Museum of Contemporary Art Cleveland
8. Dunham Tavern Museum & Gardens
9. A Christmas Story House
10. Buckland Museum of Witchcraft & Magick
11. Steamship William G. Mather Museum
12. Dittrick Medical History Center
13. USS COD
14. The Money Museum at the Federal Reserve Bank of Cleveland
15. Baseball Heritage Museum
16. International Women's Air & Space Museum
17. Cleveland Grays Armory Museum
18. SPACES
19. Soldiers' and Sailors' Monument
20. The Western Reserve Fire Museum and Education Center
21. Western Reserve Historical Society
22. Lake Erie Nature & Science Center
23. Maltz Museum
24. Polka Hall of Fame
25. Ukrainian Museum-Archives
26. ARTneo - The Museum of Northeast Ohio Art
27. Crawford Auto Aviation Museum
28. Nature Center At Shaker Lakes
29. The African American Museum in Cleveland
30. Cleveland Hungarian Museum
31. The Sculpture Center
32. Transformer Station

33. NASA Glenn Visitor Center
34. Cleveland Police Museum
35. Louis Stokes Museum
36. Italian American Museum of Cleveland
37. Cozad Bates House
38. Shaker Historical Museum
39. Community Arts Center
40. Frostville Museum
41. Brooklyn Historical Society Museum
42. Squire Rich Historical Museum
43. Cleveland Public Square
44. Museum of American Porcelain Art
45. Buehl House

Historical Sites

National Register of Historic Places listings in Cuyahoga County, Ohio,

https://en.wikipedia.org/wiki/Category:National_Register_of_Historic_Places_in_Cuyahoga_County,_Ohio

1. Aaron Aldrich House
2. John and Maria Adams House
3. Albert W. Henn Mansion
4. Alcazar Hotel (Cleveland Heights, Ohio)
5. Ambler Heights Historic District
6. Archwood Avenue Historic District
7. Baldwin-Wallace College North Campus Historic District
8. Baldwin-Wallace College South Campus Historic District
9. Bay View Hospital
10. Bedford Baptist Church
11. Berea Union Depot
12. Buckeye–Shaker
13. Buehl House
14. USS Cod
15. Fairhill Road Village
16. Fairmount Boulevard District
17. First Church of Christ in Euclid

18. First Universalist Church of Olmsted
19. Flora Stone Mather College Historic District
20. Forest Hill Park (Ohio)
21. Forest Hill, Ohio
22. Stephen Frazee House
23. Gates Mills Methodist Episcopal Church
24. Edmund Gleason Farm
25. Greenwood Farm (Richmond Heights, Ohio)
26. Independence Presbyterian Church
27. Irishtown Bend
28. Jaite Mill Historic District
29. John M. Annis House
30. Nature Center at Shaker Lakes
31. Nela Park
32. North Union Shaker Site
33. Notre Dame College
34. Ohio and Erie Canal
35. Old District 10 Schoolhouse
36. St. Joseph Convent and Academy Complex
37. St. Paul's Episcopal Church (Cleveland Heights, Ohio)
38. St. Paul's Episcopal Church of East Cleveland
39. Shaker Village Historic District (Shaker Heights, Ohio)
40. Stadium Square Historic District
41. Station Road Bridge
42. W.A. Thorp House
43. Tinkers Creek Aqueduct
44. Tower East
45. John Wheeler House (Berea, Ohio)
46. SS William G. Mather (1925)
47. Wilson Feed Mill

Zoos

Cleveland Metroparks Zoo

Parks

1. Bedford Reservation (Metro Park)
2. Big Creek Reservation (Metro Park)
3. Bradley Woods Reservation (Metro Park)
4. Brecksville Reservation (Metro Park)
5. Cleveland Botanical Garden (Botanical Garden)
6. Cleveland Lakefront Reservation (Metro Park)
7. Cleveland Zoo (Zoo)
8. Cuyahoga Valley (National Park)
9. Euclid Creek Reservation (Metro Park)
10. Gardenview Horticultural Park (Botanical Garden)
11. Garfield Park Reservation (Metro Park)
12. Huntington Reservation (Metro Park)
13. Mill Stream Run Reservation (Metro Park)
14. North Chagrin Reservation (Metro Park)
15. Ohio & Erie Canel Reservation (Metro Park)
16. Rocky River Reservation (Metro Park)
17. South Chagrin Reservation (Metro Park)
18. Washington Reservation (Metro Park)
19. West Creek Reservation (Metro Park)

Casinos

- Jack Cleveland Casino
- Jack Thistledown Racino
- MGM Northfield Park
- Tucker's Casino
- Game Time
- JACK casino

Amusement

- Water Works Family Aquatic Center
- Urban Air Trampoline and Adventure Park
- Swings-N-Things Fun Park
- Memphis Kiddie Park

- Fun 'N' Stuff
- Jurassic Mountain
- Lake City Amusement
- Sluggers & Putters Amusement Park

Appendix B: Supplementary Tables

Table AB 1. Components of the Smart Manufacturing Sector

Industry NAICS	Description	Industry NAICS	Description
336	Transportation equipment manufacturing	3261	Plastics product manufacturing
2131	Support activities for mining	3262	Rubber product manufacturing
3111	Animal food manufacturing	3272	Glass and glass product manufacturing
3112	Grain and oilseed milling	3279	Other nonmetallic mineral products
3113	Sugar and confectionery product manufacturing	3311	Iron and steel mills and ferroalloy mfg.
3114	Fruit and vegetable preserving and specialty	3312	Steel product mfg. from purchased steel
3115	Dairy product manufacturing	3314	Other nonferrous metal production
3116	Animal slaughtering and processing	3315	Foundries
3117	Seafood product preparation and packaging	3321	Forging and stamping
3118	Bakeries and tortilla manufacturing	3324	Boiler, tank, and shipping container mfg.
3119	Other food manufacturing	3327	Machine shops and threaded product mfg.
3121	Beverage manufacturing	3329	Other fabricated metal product manufacturing
3241	Petroleum and coal products manufacturing	3332	Industrial machinery manufacturing
3251	Basic chemical manufacturing	3336	Turbine and power transmission equipment mfg.
3252	Resin, rubber, and artificial fibers mfg.	3339	Other general purpose machinery manufacturing
3253	Agricultural chemical manufacturing	3345	Electronic instrument manufacturing
3255	Paint, coating, and adhesive manufacturing	3351	Electric lighting equipment manufacturing
3256	Soap, cleaning compound, and toiletry mfg.	3352	Household appliance manufacturing
3259	Other chemical product and preparation mfg.	3353	Electrical equipment manufacturing

Table AB 2: Components of Healthcare Related Industries

Industry NAICS	Description
5417	Scientific research and development services
6215	Medical and diagnostic laboratories
32541	Pharmaceutical and medicine manufacturing
33911	Medical equipment and supplies manufacturing
333314	Optical instrument and lens manufacturing
423450	Medical equipment merchant wholesalers
423460	Ophthalmic goods merchant wholesalers
424210	Druggists' goods merchant wholesalers
524114	Direct health and medical insurance carriers
532291	Home health equipment rental
541380	Testing laboratories

Table AB 3: Components of Healthcare Services and IT Industries

Industry NAICS	Description of Healthcare Services	Industry NAICS	Description of IT Industry
621	Ambulatory health care services	518	Data processing, hosting and related services
622	Hospitals	3341	Computer and peripheral equipment mfg.
623	Nursing and residential care facilities	3344	Semiconductor and electronic component mfg.
		5112	Software publishers
		5415	Computer systems design and related services
		51912	Libraries and archives
		51913	Internet publishing and web search portals
		51919	All other information services
		334611	Software reproducing
		811212	Computer and office machine repair

Appendix C: Hospitality Sector Owner/Manager Survey Instrument



https://baldwinwallace.co1.qualtrics.com/jfe/form/SV_ea4m7X0QLs9C2HQ

Hospitality industry owner/manager survey

This is an anonymous survey being conducted by the Baldwin Wallace University Community Research Institute (CRI) for the Cuyahoga County Department of Development. The goal of the survey is to gather information about your establishment. Your response to the questions will be reported as part of a group of responses. Your participation will be kept confidential. As an incentive to participate, you can choose at the end of the survey to provide contact information to be entered into a drawing for one of five \$50 Target or Walmart gift cards.

You can take the survey online using the QR code, weblink, or as a paper survey.

Q1 How long has your establishment been in business?

- less than one year (1)
- 1-3 years (2)
- 4-6 years (3)
- 7-10 years (4)
- 11-15 years (5)
- more than 15 years (6)

Q2 How many staff in each type of position (kitchen, servers, bartenders, etc.) work here?

	1-5 (1)	6-10 (2)	10-15 (3)	more than 15 (4)
Kitchen (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Servers (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bussers (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Host/hostesses (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3 Which of the following would you consider your typical types of customers?

- families (1)
- young singles and couples (2)
- older singles, couples (3)
- a mix of all of the above (4)

Q4 Please describe how your business is doing now compared with 2-3 years ago at the height of the Covid-19 lockdown.

- fully recovered from before Covid and growing (1)
- fully recovered from before Covid and stable (2)
- still recovering; amount of business is still below pre-covid level (3)
- our opened after the end of Covid restrictions (4)
- not sure (5)

Q5 What challenges do you face in keeping your business going? (please check all that apply)

- staff recruitment (1)
- staff retention (2)
- rising staff costs (3)
- rising supply costs (4)
- reliable supply delivery (5)
- marketing (6)
- facility costs (rent, utilities, taxes, etc.) (7)
- loss of office-based customers now working remotely (8)

Q6 How would you describe your relationship with local government (Building and Zoning, Health Department)? Has local government been helpful in supporting your business? Why or why not?

Q7 How could local government be more helpful in supporting your business?

Q8 Do you belong to one or more associations or groups such as a local chamber of commerce or an industry association that supports your business?

- yes (1)
- no (2)
- not that I am aware of (3)

Q9 How has this group been helpful to your business?

Q10 Would establishing an office in local government that promotes and provides help to businesses like yours be beneficial?

- yes (1)
- Maybe (2)
- No (3)

Q11 What would you need from such an office?

Q12 Where do you see your business three years from now? (growing; same size; possibly smaller; may no longer be in business) What factors do you see involved in this prediction?

- growing at this location (1)
- growing and expanding to new locations (2)
- remaining about the same amount of business (3)
- having less business but still in functioning (4)
- may no longer be in business (5)

Q13 What factors affect how you see the future of your business? (please check all that apply)

- customer choices of places to dine and/or be entertained (1)
 - ability to recruit, train and retain reliable staff (2)
 - changes in labor costs (3)
 - changes in supply costs (4)
 - willingness of customers to pay higher prices (5)
 - ability to access business loans (6)
 - neighborhood safety (7)
 - parking availability (8)
 - other (please explain) (9)
-

Q14 If you are willing share this information, what is your approximate annual gross revenue?

- less than \$25,000 (4)
 - \$25,000 - \$50,000 (5)
 - \$50,000 - \$100,000 (6)
 - \$100,000 - \$250,000 (7)
 - \$250,000 - \$500,000 (8)
 - \$500,000 - \$1,000,000 (9)
 - \$1 million - \$5 million (10)
 - more than \$5 million (11)
-

Q15 What is your profit margin?

- 1% - 5% (1)
- 5% - 10% (2)
- more than 10% (3)

Appendix D: Hospitality Staff Survey Instrument



<https://bit.ly/hospitalitystaffsurvey>

Baldwin Wallace University Community Research Institute Hospitality Establishment Staff Survey

This is an anonymous survey being conducted by the Baldwin Wallace University Community Research Institute (CRI) for the Cuyahoga County Department of Development. The goal of the survey is to gather information about your workplace. Your response to the questions will be reported as part of a group of responses. Your participation will be kept confidential. As an incentive to participate, you can choose at the end of the survey to provide contact information to be entered into a drawing for one of five \$50 Target or Walmart gift cards.

You can take the survey online using the QR code, weblink, or as a paper survey (please send back in the stamped, addressed envelope).

1. What is the name of the community where you live?

2. What is the zip code for your home address?

3. Which of the following best describes the establishment where you work?

- | | |
|-----------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Full service restaurant | <input type="checkbox"/> Nightclub |
| <input type="checkbox"/> Fast/casual restaurant | <input type="checkbox"/> Catering business |
| <input type="checkbox"/> Take out only food service | <input type="checkbox"/> Brewery or distillery |
| <input type="checkbox"/> Bar | <input type="checkbox"/> Winery |

4. In what community is the establishment located?

5. Which of the following best describes your role? (please select all that apply)

- | | |
|----------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Host/hostess | <input type="checkbox"/> Kitchen cleaning/dishwashing |
| <input type="checkbox"/> Shift manager | <input type="checkbox"/> Cook |
| <input type="checkbox"/> Server | <input type="checkbox"/> Chef |
| <input type="checkbox"/> Bartender | <input type="checkbox"/> other (position): _____ |
| <input type="checkbox"/> Busser | |

6. What is the average number of hours you work each week at this establishment?

- | | | |
|--------------------------------------|--------------------------------------|----------------------------------------|
| <input type="checkbox"/> 5-10 hours | <input type="checkbox"/> 21-30 hours | <input type="checkbox"/> over 40 hours |
| <input type="checkbox"/> 11-20 hours | <input type="checkbox"/> 31-40 hours | |

7. Which of the following do you prefer?

- | |
|-------------------------------------------------------------------------------------------|
| <input type="checkbox"/> More assigned hours each week |
| <input type="checkbox"/> Less assigned hours each week |
| <input type="checkbox"/> No change - I am satisfied with the number of hours I am working |

8. How long have you worked at this establishment?

- | | |
|---------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> less than 3 months | <input type="checkbox"/> 1-4 years |
| <input type="checkbox"/> 3-6 months | <input type="checkbox"/> 5-7 years |
| <input type="checkbox"/> 6 months - 1 year | <input type="checkbox"/> 8-10 years |
| | <input type="checkbox"/> more than 10 years: # _____ |

9. How long have you worked in the restaurant industry?

- | | |
|-----------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> 1 year or less | <input type="checkbox"/> 6-10 years |
| <input type="checkbox"/> 1-5 years | <input type="checkbox"/> more than 10 years: # _____ |

10a. Have you worked in other jobs outside of the restaurant industry?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

10b. If yes to 10a, in what other types of jobs have you worked?

11a. Are you currently attending school or a training program?

yes no

11b. If yes, what type of education and/or training? (please choose all that apply)

Community college Four-year college/university
 Vocational training program (please list type of profession): _____

12a. Are you currently working at a second job?

Yes No

12b. If yes, in what type of job are you working?

13. When do you get shift assignments?

At the end of the week for the following week
 Shifts are assigned for two week intervals
 Shifts are assigned for one month intervals

14. How satisfied are you with the shift schedule?

Extremely dissatisfied
 Somewhat dissatisfied
 Neither satisfied nor dissatisfied
 Somewhat satisfied
 Extremely satisfied

15. How likely is it that you can change a shift quickly to handle a personal situation?

Extremely unlikely Somewhat likely
 Somewhat unlikely Extremely likely
 Neither likely nor unlikely

16. How much would you agree or disagree with the following statements?	strongly agree	agree	disagree	strongly disagree	no opinion
My employer provides a safe work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees are appreciated for a job well done	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy working with our customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I occasionally deal with difficult customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I make enough money to meet my needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have experienced an increase in stress at work since the pandemic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The demands of my job interfere with my ability to fulfill family or home responsibilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I am satisfied with my current employment situation

17. How important to you are each of the following?

	Very important	Somewhat important	Not very important	Not at all important
A good wage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flexible hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities for career advancement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningful work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paid time off	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical and dental benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessible, affordable childcare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Is there anything else that is important?

No
 Yes (please explain)

Respondent Demographic Information (only used for survey analysis)

19. What is your gender identity?

Female Male Non-binary

Other (please describe): _____

20. What is your age?

under 18 36-45
 18-25 46-55
 26-35 56 or older

21. What is your race/ethnicity?

Black/African-American Native American
 White non-Hispanic Multiracial
 Asian-American/Pacific Islander Something else: _____

22. Are you of Hispanic/LatinX origin?

Yes No Not sure

23. What is your level of educational attainment?

less than high school Some college
 High school diploma or GED Bachelor's degree
 Vocational training and/or apprenticeship Graduate work/degree

24. Is English your first language?

Yes No

25. What is your estimated annual household income?

less than \$15,000 \$25,001 - \$30,000 \$40,001 - \$50,000
 \$15,000 - \$20,000 \$30,001 - \$35,000 \$50,001 - \$75,000
 \$20,001 - \$25,000 \$35,001 - \$40,000 more than \$75,000

26. How many adults (18 or older) contribute to your household income?

0 1 2 3 or more

27. Is there anyone in your household that provides regular unpaid child or elder care for your household?

Yes No

28. What is your current marital status?

single living with a partner married
 divorced

29. Including yourself, how many people age 18 and over live in your household?

0 1 2 3 or more

30. How many children under the age of 18 reside in your home?

0 1 2 3 or more

31. Have you or anyone in your household received any of the following in the last 12 months? (please check all that apply)

- Unemployment compensation
- Workers Compensation payments
- Temporary Assistance for Needy Families (TANF)
- SNAP (Food stamps)
- WIC (Women, Infants, and Children program)
- Medicare
- Medicaid
- Housing assistance
- Social Security Disability
- Social Security Survivors
- Social Security Supplemental Income
- Social Security Retirement benefit

32. Please provide your name and either a phone number or email address to be entered in the drawing for one of the five Target or Walmart \$50 gift cards.
