Georgia Budget & Policy Institute

Policy Report

Bad Times for Good Jobs

Georgia's Shrinking Middle Class Opportunity

By Wesley Tharpe, Policy Analyst

A good-paying job is the cornerstone of a secure middle-class life, but Georgia's private sector economy is failing to provide enough of them. Industries in Georgia that pay a middle-class wage suffered most during the Great Recession, and have come back more slowly than low- and high-wage industries during the recovery. Families either already considered middle class or trying to work their way there cannot thrive if the economy fails to provide sufficient opportunities.

This report explores Georgia's job trends across low-, mid- and high-wage industries from 2007 to 2013. The three categories are described in the box below, and the report's full approach is explained at the end in Appendix A: Methodology. The three main findings are:

- **The recession hit workers in mid-wage industries hardest and they are faring the worst in the recovery.** Georgia's mid-wage industries comprised 52 percent of private sector job losses during the Great Recession from 2007 to 2010, but only 15 percent of gains during the recovery from 2010 to 2013. Georgia's private sector had about 138,100 *fewer* jobs in mid-wage industries in 2013 than it did in 2007, before the recession began.

- **Low- and high-wage industries account for most of Georgia's job growth in the recovery.** Low- and high-wage industries in Georgia have recovered the jobs lost during the recession, unlike mid-wage industries. Low- and high-wage industries account for a combined 85 percent of Georgia's net job growth from 2010 to 2013, split about evenly between the two.

- **State and local government budget cuts caused additional job losses in the public sector.** Government professions, such as teachers and police officers, are a historical source of middle-class jobs with decent wages. But Georgia's state and local governments employed 35,700 fewer workers in 2013 than they did in 2007. About 54 percent, or 19,400, of these lost jobs are due to layoffs among education workers employed by local governments.

Wage Categories Defined

The analysis divides 97 industries for which relevant data are available on the state level into three wage categories:

Low-wage industries pay a worker on average from $7.85 to $15.20 per hour, or about $16,300 to $31,600 per year for a 40-hour week. Some jobs in this category are food servers, temp workers and home health aides.

Mid-wage industries pay a worker on average between $15.21 and $27.63 per hour, or about $31,600 to $57,500 per year for a 40-hour week. Some jobs in this category are repair worker, construction contractors and E.R. nurses.

High-wage industries pay a worker on average from $27.64 to $45.98 per hour, or about $57,500 to $95,600 per year for a 40-hour week. Some jobs in this category are doctors, lawyers and computer programmers.

Wage and job data are drawn from the Quarterly Census on Employment and Wages, available through December 2013 at time of publication. Comprehensive jobs and wage data for each industry are available in Appendix B: Data.

State lawmakers are somewhat limited in their ability to stimulate the private economy directly, since it is driven largely by global and national trends. But policymakers can maximize the ability of low- and mid-wage families to earn a living. What are some of their options? Lawmakers could enhance investment in education and workforce training; prioritize good-paying jobs when awarding state contracts and business subsidies; and explore policies like a higher minimum wage or state Earned Income Tax Credit that boost the paychecks of families trying to work their way into the middle class.

Unbalanced Job Growth Opens Up Big Mid-Wage Jobs Deficit

From late 2007 to early 2010, Georgia suffered its worst economic crisis since the 1930s. Its private sector economy lost about 320,900 jobs from 2007 to 2010 and only recovered about 60 percent, or 193,800, of them from 2010 to 2013.[1] These broad trends mask the variation that occurs across industries at different wage tiers. Georgia's economy over the past few years is defined by a disparity between the types of jobs lost during the recession and the types of jobs employers are adding in the recovery:

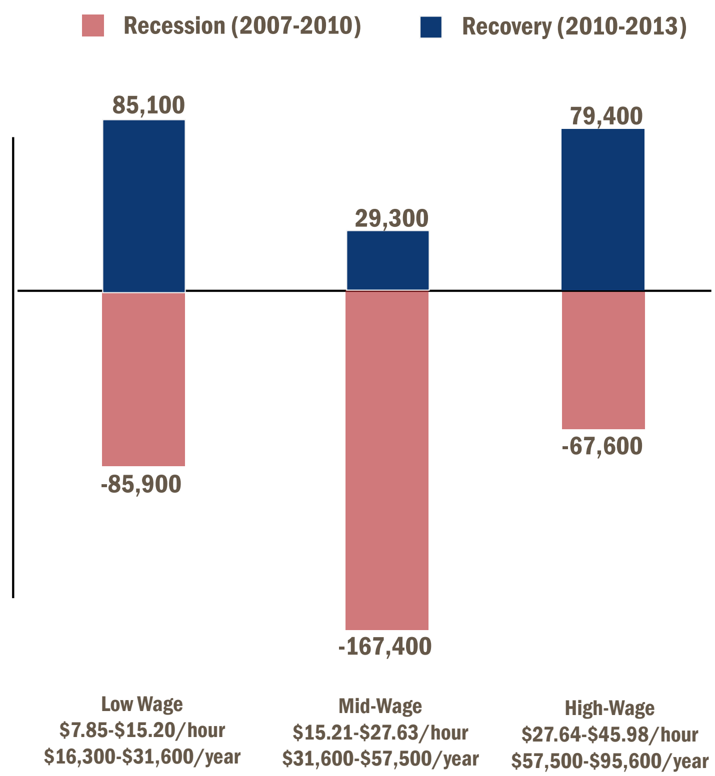
- During the 2007-2010 **recession,** private sector employment in mid-wage industries fell 14.5 percent, compared to 7.5 percent for low-wage industries and 6.1 percent for high-wage industries.

- During the 2010-2013 **recovery,** private sector employment in mid-wage industries grew by only 3 percent, compared to 8 percent for low-wage industries and 7.7 percent for high-wage industries.

This imbalance leaves workers in Georgia's mid-wage industries in far worse position than before the Great Recession. About 138,100 *fewer* Georgians were employed in mid-wage industries in 2013 than in 2007. Low-wage industries have recovered close to the levels before the crisis hit, with only 800 fewer Georgians employed in low-wage industries in 2013 than in 2007. High-wage industries employed 11,800 more workers in 2013 than in 2007, as illustrated in the chart below.

Mid-Wage Industries Fell Furthest in Recession, Growing Slowest in Recovery

Net job changes rounded to nearest 100, private sector, by wage category



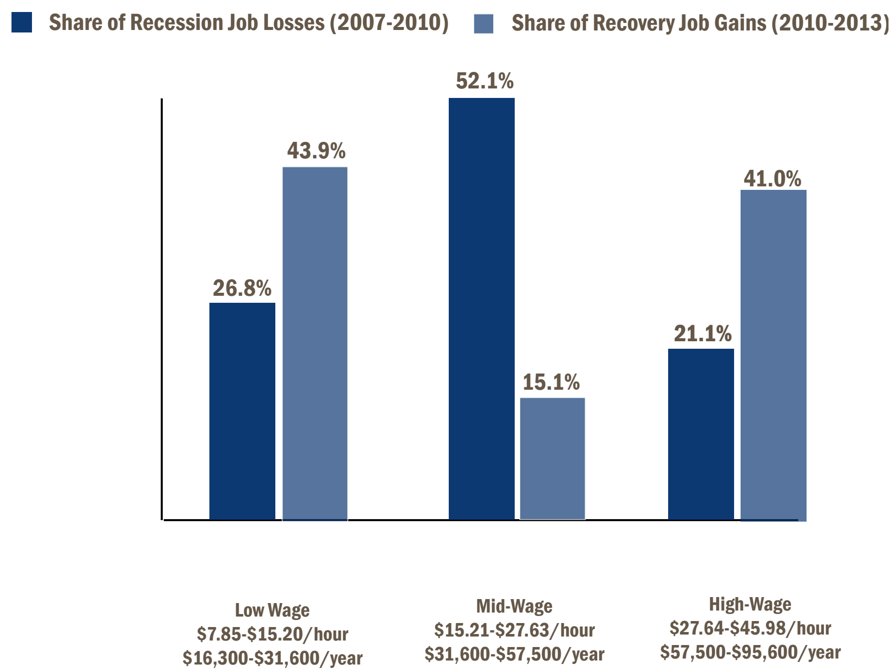
Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)

Low-and High-Wage Industries Drive Georgia's Recovery

Another way to measure Georgia's recent job trends is by the share of net growth attributable to the low-, mid- and high-wage categories in the recession compared to the recovery.

- **Low-wage industries** accounted for 27 percent of Georgia's net private sector job losses during the recession and 44 percent of gains during the recovery.
- **Mid-wage industries** accounted for 52 percent of Georgia's net private sector job losses during the recession but only 15 percent of gains during the recovery.
- **High-wage industries** accounted for 21 percent of Georgia's net private job losses during the recession and 41 percent of gains during the recovery.

Mid-Wage Industries Comprise Largest Share of Recession Losses, Smallest Share of Recovery's Gains



Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)

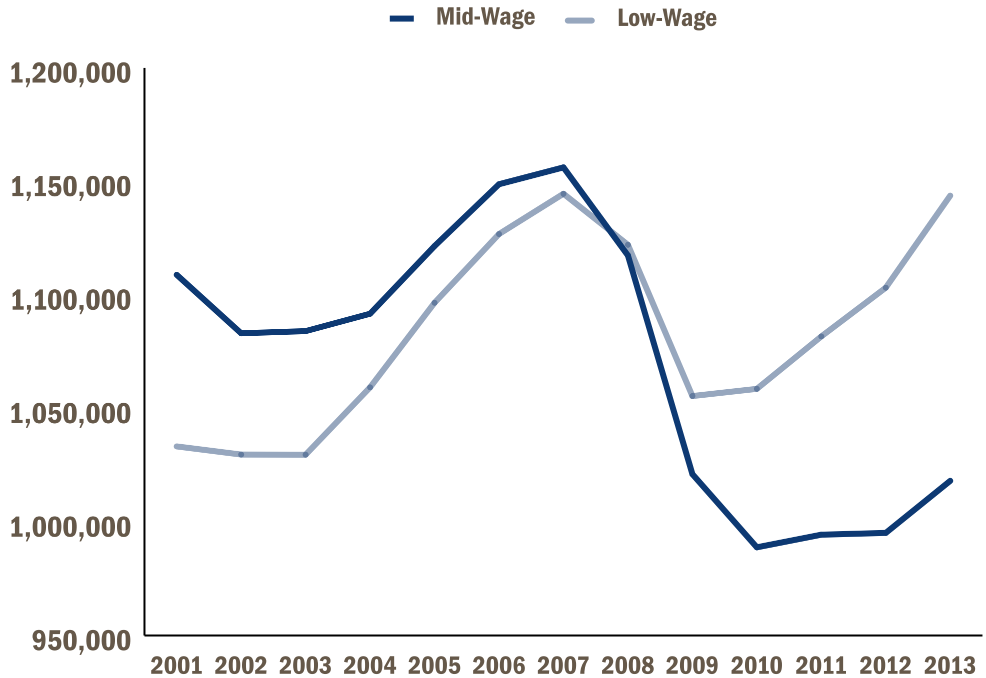
Georgia's Labor Market Tilted More Toward Low-Wage Jobs Now

Georgia's job market is now characterized by low-wage industries more than at the start of the 2000s, for the most part due to the decline of mid-wage industries in the Great Recession. High-wage industries made up the largest share of Georgia's job market in 2001, 34.4 percent, compared to 33.9 percent for mid-wage industries and 31.6 percent for low-wage industries. By 2013 low-wage industries accounted for the largest share of jobs, 34.9 percent, compared to 31.1 percent for mid-wage industries and 34.1 percent for high-wage industries.

This suggests Georgia's economy is shifting away from mid-wage industries and toward low-wage ones, as illustrated in the following chart. This is caused largely by job losses in middle-class industries like construction and manufacturing, as well as sizable job growth in low-wage industries, including food service and temporary administrative support.

Georgia's Changing Jobs Market Leaves Middle Class Behind

Georgia annual employment by industry wage category



Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)

Some Details on Which Industries are Driving Trend

A detailed review of the 97 industries studied in this report reveals some of the reasons for Georgia's unbalanced growth. Detailed industry trend listings are under Appendix B: Data.

- **Food and staffing services drive low-wage growth** – The largest share of new jobs added in low-wage industries during the recovery are in the food and drink service category, which added about 33,100 jobs from 2010 to 2013. Workers in food service earn the lowest average wage of *any industry.* The second largest share of jobs Georgia employers added in this span, 24,800, came in the employment services category, which consists of temporary workers provided by staffing agencies. Food and employment services make up about 30 percent of jobs added in Georgia during the recovery.

- **Construction and non-durable manufacturing drag down the middle class** – The three largest job-losers among mid-wage industries since the recession began are within the construction sector. From 2007 to 2013, Georgia lost 44,900 jobs in the specialty trade contractors industry, 17,200 in the construction of buildings industry and 13,600 in the heavy and civil engineering construction industry. This left Georgia with 75,700 fewer construction jobs in 2013 than in 2007, a 34 percent decline. Non-durable manufacturing, a sector that includes a range of industries like food processing and carpet manufacturing, also declined. For example, Georgia had 11,300 fewer jobs in textile product mills in 2013 than in 2007, a 30-percent drop.

- **Health care, office professions and some advanced manufacturing fuel growth at the top** – About a quarter, 25.8 percent, of the high-wage industry jobs added in Georgia's recovery came in the category of ambulatory health services, which includes primary care doctors, dentists and other non-hospital health services. That group added about 20,500 jobs out of the 79,400 high-wage industry jobs Georgia added from 2010 to 2013. The next largest categories of high-wage growth in the recovery were in finance and insurance, computer programming design and transportation equipment manufacturing. The latter includes mostly car manufacturing.[2] Other office professions like accounting and marketing also added jobs during the recovery from 2010 to 2013.

State and Local Budget Cuts Worsen Problems

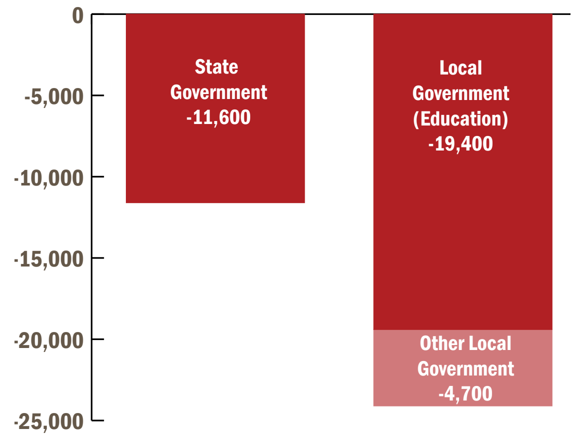
Georgia's private sector is the focus of this report, but cuts to the public sector worsen the problem of middle class job losses. Teachers, fire fighters, police officers, state agency administrators and other public workers are a historical source of decent-paying jobs for the middle class, but they have been hammered by the deep budget cuts imposed during the economic downturn.

Georgia's state and local governments employed 35,700 fewer people in 2013 than in 2007.[3] The wage for an average worker in Georgia's state and local government was comparable to a mid-wage private sector job in 2013 at $18.40 an hour, or about $38,300 per year.[4]

Local governments make up the largest share of the crash in state and local jobs, dropping by 24,100 from 2007 to 2013. A majority of these workers, 19,400, were in local education services, either in the classroom or various support roles. That decline accounts for about 80 percent of lost *local* government jobs and 54 percent of the *combined* lost jobs in state and local government.

Budget Cuts Lead to Lost State and Local Jobs, Especially in Education

Net employment change rounded to nearest 100, 2007-2013



Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)

Conclusion and Recommendations

Families already in the middle class or working to join it cannot thrive if the economy fails to generate enough mid-wage jobs. State lawmakers are somewhat limited in their ability to stimulate the private economy directly, but there are a number of ways they can maximize the ability of Georgia workers to earn a decent living.

Improve education and workforce options – State lawmakers could strengthen the ability of Georgians to gain the skills necessary to work in higher-wage industries. That includes reversing cuts made in recent years to K-12 education, technical colleges and the university system that limited affordable access to schools and career training. It could also include increased focus on training initiatives already in place like the workforce development program QuickStart, as well as potential new options like a state apprenticeship program or deeper connections between technical schools and high-growth industries like health care and computer programming. A stronger educational system is also a proven, essential strategy for attracting the kind of good-paying employers that require a highly trained workforce, including high-tech companies.

Boost the paychecks of low-wage workers – Lawmakers could consider tools that help workers stuck in low-wage jobs to more effectively reach the middle class. One way to do that is to raise the state's minimum wage, which is an option GBPI will further explore in a report scheduled for release this fall. Another solution is to create a state-level Earned Income Tax Credit (EITC), essentially a wage-subsidy only available to families that work. State EITCs are modeled on a highly effective national program and are now available in 25 states plus the District of Columbia.[5] Lawmakers can also consider policies that bolster family incomes in other ways, such as aid to parents trying to afford child care and health insurance.

Prioritize good-paying jobs when subsidizing private companies – Georgia's state and local governments spend hundreds of millions in taxpayer dollars each year on various contracts, tax credits and direct subsidies for business. Some of these business incentives now give preference to higher-wage jobs, but others are available to low-wage employers. State and local policymakers should review ways to better target economic development policies toward employers that pay workers at least a middle-class wage.

Endnotes

[1]The jobs figures in this paragraph, and report as a whole, come from the Quarterly Census on Employment and Wages (QCEW) reported by the U.S. Bureau of Labor Statistics (BLS). They differ slightly from jobs numbers GBPI has reported in the past from the other main BLS data source, Current Employment Statistics (CES).

[2]Georgia lost about 18,600 finance and insurance jobs during the recession and recovered 11,800 of them in the recovery from 2010 to 2013. The computer systems design and programming industry, which pays an average worker about $90,300 per year, added a little more than 8,000 jobs from 2010 to 2013 after (unlike most industries) adding jobs during the recession as well—about 2,500. The transportation manufacturing industry added about 7,400 jobs in Georgia from 2010 to 2013, after shedding about 4,800 in the recession.

[3]Federal jobs rose slightly in Georgia from 2007 to 2013, adding 4,240 positions.

[4]The QCEW does not report a precise average wage for state and local government combined. We calculated a weighted average for it using the average weekly wage for its two component parts: state and local government.

[5]"Policy Basics: State Earned Income Tax Credits," Center on Budget and Policy Priorities (CBPP). Updated 1/2/2014.

Appendix A: Methodology

Below is a detailed description of GBPI's method used to reach the conclusions in this report. For additional information, please contact Wesley Tharpe, policy analyst, at wtharpe@gbpi.org.

Background

The core of this analysis is a review of Georgia's job trends since 2007 across individual industries that comprise the economy as a whole. Job losses and gains naturally occur at different times in different industries, sometimes quite drastically. Construction can shed jobs while health care is hiring, for example. Because companies in different industries pay sometimes vastly different wages, it is possible for job losses or gains to be concentrated in industries that pay at least a middle-class wage, or in those that do not.

The approach used for this analysis is modeled largely off an April 2014 report by the National Employment Law Project (NELP), entitled "The Low-Wage Recovery: Industry Employment and Wages Four Years into the Recovery." The author of that report provided GBPI with guidance to get the project off the ground in its early stages. At the same time, differences in data availability for individual states versus the nation as a whole required substantial adjustments to make the analysis work on the state level.

Collecting and Organizing the Industry Employment Data

The methodology can be broken down into several parts. First, GBPI gathered annual data on industry employment and average weekly wages for 2001-2013 from the Quarterly Census of Employment and Wages (QCEW), published quarterly by the U.S. Bureau of Labor Statistics (BLS) in Washington, D.C. The last quarter of 2013 is the most recent data available at the time of publishing. These data are publicly accessible at http://data.bls.gov/cgi-bin/dsrv?en.

Jobs and wage data were assembled for 102 private sector industries available at the state-level, as well as for Georgia's private sector economy as a whole to ensure the chosen collection of industries total to equal Georgia's entire economy. These 102 industries were reduced to 97 for the final analysis to account for technical issues detailed later in this section. GBPI also gathered equivalent data for Georgia's federal, state and local government employment from 2001-2013.

Reviewing Industry Employment Trends

The chosen industries were ranked according to their average weekly wage for 2013. This permits an analysis of the three distinct categories of low-wage, mid-wage and high-wage industries. The categories are roughly equal in size by 2007 employment levels. Ideally, the categories would have an equal level of employment at the point in time where the analysis begins, in this case 2007. That would make the respective scope of the categories' job changes perfectly comparable; for example, if the low- and mid-wage categories each housed 1 million jobs in 2007, then a loss of, say, 10,000 jobs over three years would mean exactly the same thing. Because industries vary in size, it is impossible to make wage categories exactly equal. Categories are made as equal-sized as possible, as shown in Appendix B: Data.

With categories formed, annual employment was tracked across all three from 2007 to 2013, using 2007-2010 as the definition of the recession and 2010-2013 as the definition of recovery. The text and charts round all job figures to the nearest 100, for ease of readability. Exact numbers for each industry are available in Appendix B. The relevant charts in the report were formed by totaling net job change in each of the three wage categories between 2007 and 2010 and comparing the result to net job change within those same categories for 2010 to 2013. The 97 specific industries remain grouped within assigned wage category during both timespans.

Annual comparisons are used to avoid any distortion that might be caused by the fact that QCEW jobs data are not seasonally-adjusted. Comparing QCEW in June of one year to December of another, for example, would obscure the true economic trend by capturing things such as seasonal ramp-ups in retail trade and other industries and seasonal slowdowns in others, such as educational services.

Some Technical Adjustments on Employment

Customized adjustments are made for some industries to make their employment figures compatible with the broader analysis. First, QCEW only reliably reports employment and wage data for nine of the 11 industries within the transportation and warehousing sector. GBPI adjusted for this by reporting industry-specific data for only the six largest industries within the broader transportation and warehousing sector and assigning the remainder of the broader sector's employment into an ad-hoc industry dubbed Other Transportation. An average wage for the newly generated industry is calculated by running a weighted average of its component parts using wage data from 2012, the last year complete wage data were available. Wages were then adjusted to 2013 dollars.

Second, from 2001 to 2006, QCEW reported jobs and wage data for an industry called Internet publishing and broadcasting within the broader Information category. That industry was eliminated starting in 2007 and its respective employment was added to the 'other information services' industry. GBPI combined the industries for 2001 to 2006 to account for the change.

Some Details and Caveats on Wages

To present an industry's average *hourly* wage, GBPI divided the average weekly wage provided by the QCEW by 40 hours per week. To present an industry's average *annual* wage, we multiplied the QCEW's weekly wage by 52 weeks in a year. Ideally, this analysis would employ *median* wages instead of *average* wages because median wages are a more reliable measure of how much a typical worker within an industry earns. Average wages are sometimes distorted by the presence of higher-wage occupations in an industry, such as a manufacturing CEO counted in the same industry as an assembly line worker. Median wages are unavailable in the QCEW. As a result, this analysis probably overestimates the wage of typical workers in some industries by a small amount.

Checking the Analysis against Other Data Sources

Finally, it should be noted researchers could explore these trends in more than one way. The BLS releases two forms of industry employment data available on the state-level: Current Employment Statistics (CES) and the Quarterly Census of Employment and Wages (QCEW). The data sources offer different strengths and weaknesses. The main advantage of the CES is that its data are released monthly, which allows for a more timely analysis. The considerable disadvantage of CES is it only includes state-level wage and employment data for 18 industries. QCEW data are less timely but far more precise. Using the QCEW allows this report to analyze 97 industries within the state's private economy, providing a more accurate and meaningful analysis.

Although GBPI used the QCEW in its analysis, we employed the same methodology to also review the alternative CES data, in order to double-check the report's general findings and trends. The alternative analysis utilized CES's monthly industry employment data, available at http://data.bls.gov/cgi-bin/dsrv?sm, and industry median wages periodically made available by BLS through its Occupational Employment Statistics (OES) data series; available at http://www.bls.gov/oes/2012/may/oes_research_estimates_2012.htm. The overall story of wages and job growth were quite similar between the CES and QCEW data, although the precise numbers of job losses and gains were of course different.

Appendix B: Data

Industry Employment Trends, Organized by Sector							
Sector	Industry	Average Hourly Wage, 2013	# Jobs Change Recession 2007-2010	#Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Agriculture, forestry, fishing and hunting	Crop production	$10.70	423	-59	3.6%	9,984	10,348
	Animal production and aquaculture	$16.40	-260	136	-3.0%	4,197	4,073
	Forestry and logging	$20.00	-711	-135	-14.5%	5,829	4,983
	Fishing, hunting and trapping	$13.68	-28	3	-9.3%	270	245
	Agriculture and forestry support activities	$15.20	-100	203	2.0%	5,112	5,215
Mining, etc.	Mining, quarrying, and oil and gas extraction	$28.88	-1,932	-236	-31.6%	6,861	4,693
Utilities	Utilities	$39.30	-903	93	-3.9%	20,573	19,763
Construction	Construction of buildings	$27.63	-17,428	209	-34.8%	49,418	32,199
	Heavy and civil engineering construction	$23.68	-11,281	-2,347	-39.9%	34,119	20,491
	Specialty trade contractors	$21.98	-43,086	-1,781	-32.6%	137,578	92,711
Nondurable Manufacturing	Food manufacturing	$25.55	-6,304	44	-9.2%	67,858	61,598
	Beverage and tobacco product manufacturing	$30.45	-340	823	13.4%	3,595	4,078
	Textile mills	$19.55	-7,892	-415	-31.1%	26,748	18,441
	Textile product mills	$20.18	-8,604	-2,685	-30.2%	37,409	26,120
	Apparel manufacturing	$14.80	-1,880	-396	-43.2%	5,271	2,995
	Leather and allied product manufacturing	$25.18	14	-6	10.5%	76	84
	Paper manufacturing	$32.25	-2,573	-56	-12.3%	21,366	18,737
	Printing and related support activities	$21.65	-5,144	-1,197	-32.2%	19,715	13,374
	Petroleum and coal products manufacturing	$29.25	-71	-46	-10.7%	1,095	978
	Chemical manufacturing	$32.05	-2,001	104	-8.9%	21,229	19,332
	Plastics and rubber products manufacturing	$22.40	-4,922	735	-17.7%	23,712	19,525
Durable manufacturing	Wood product manufacturing	$18.80	-8,786	813	-34.1%	23,391	15,418
	Nonmetallic mineral product manufacturing	$24.25	-6,688	-988	-35.8%	21,467	13,791
	Primary metal manufacturing	$23.68	-1,570	1,387	-2.5%	7,269	7,086

Industry Employment Trends, Organized by Sector							
Sector	**Industry**	**Average Hourly Wage, 2013**	**# Jobs Change Recession 2007-2010**	**#Jobs Change Recovery 2010-2013**	**% Employment Change 2007-2013**	**2007 Employment Level**	**2013 Employment Level**
Durable manufacturing (continued)	Fabricated metal product manufacturing	$21.50	-6,758	3,783	-10.4%	28,595	25,620
	Machinery manufacturing	$26.45	-5,416	1,413	-16.5%	24,199	20,196
	Computer and electronic product manufacturing	$42.00	-2,727	681	-15.5%	13,179	11,133
	Electrical equipment and appliance manufacturing	$34.43	-4,071	714	-22.4%	14,990	11,633
	Transportation equipment manufacturing	$31.63	-4,762	7,416	6.3%	41,899	44,553
	Furniture and related product manufacturing	$17.93	-4,827	219	-32.2%	14,319	9,711
	Miscellaneous manufacturing	$25.83	-2,531	155	-17.5%	13,583	11,207
Wholesale trade	Merchant wholesalers, durable goods	$34.43	-17,240	2,456	-13.0%	113,864	99,080
	Merchant wholesalers, nondurable goods	$29.08	-4,067	1,935	-3.4%	62,610	60,478
	Electronic markets & agents & brokers	$39.38	-2,105	3,875	4.1%	43,216	44,986
Retail trade	Motor vehicle and parts dealers	$20.93	-10,844	5,798	-8.0%	63,318	58,272
	Furniture and home furnishings stores	$14.28	-5,402	853	-23.5%	19,398	14,849
	Electronics and appliance stores	$19.03	-3,007	-569	-22.6%	15,824	12,248
	Building material and garden supply stores	$15.13	-8,116	141	-18.0%	44,352	36,377
	Food and beverage stores	$10.00	-1,753	6,634	6.0%	81,264	86,145
	Health and personal care stores	$17.00	-1,054	385	-2.3%	29,189	28,520
	Gasoline stations	$10.45	-2,063	448	-5.6%	29,002	27,387
	Clothing & clothing accessories stores	$8.80	-6,323	-1,365	-16.5%	46,464	38,776
	Sports, hobby, music instrument, book stores	$9.35	-674	607	-0.4%	17,550	17,483
	General merchandise stores	$10.53	-1,985	4,013	2.0%	99,408	101,436
	Miscellaneous store retailers	$12.45	-3,762	612	-13.3%	23,703	20,553
	Nonstore retailers	$20.23	-337	801	5.0%	9,256	9,720

Industry Employment Trends, Organized by Sector							
Sector	Industry	Average Hourly Wage, 2013	# Jobs Change Recession 2007-2010	#Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Transportation and warehousing	Air transportation	$38.75	263	-45	0.6%	38,656	38,874
	Truck transportation	$20.75	-6,311	3,004	-6.7%	49,319	46,012
	Transit and ground passenger transportation	$12.63	404	480	18.0%	4,907	5,791
	Support activities for transportation	$21.30	-563	2,843	11.7%	19,497	21,777
	Couriers and messengers	$27.58	-1,497	896	-3.0%	19,893	19,292
	Warehousing and storage	$19.98	-972	917	-0.2%	27,196	27,141
	Other Transportation	$27.32	125	13	12.5%	1,100	1,238
Information	Publishing industries, except Internet	$43.53	-4,406	-716	-17.8%	28,764	23,642
	Motion picture and sound recording industries	$22.18	112	1,249	21.6%	6,300	7,661
	Broadcasting, except Internet	$44.50	-1,815	160	-11.3%	14,586	12,931
	Telecommunications	$40.13	-2,189	-1,384	-6.9%	51,853	48,280
	Data processing, hosting and related services	$44.98	-4,944	727	-39.1%	10,788	6,571
	Other information services	$38.78	832	828	113.5%	1,463	3,123
Finance and insurance	Finance and insurance	$37.93	-18,555	11,803	-4.1%	163,390	156,638
Real estate and rental and leasing	Real estate	$25.43	-4,741	1,019	-8.7%	42,758	39,036
	Rental and leasing services	$20.45	-4,195	359	-18.6%	20,574	16,738
	Lessors of nonfinancial intangible assets	$37.13	-102	-90	-14.5%	1,323	1,131
Professional and technical services	Legal services	$36.15	-2,758	1,708	-3.3%	31,816	30,766
	Accounting and bookkeeping services	$28.20	5,171	5,432	35.6%	29,811	40,414
	Architectural and engineering services	$37.40	-6,066	2,035	-9.9%	40,791	36,760
	Specialized design services	$25.63	-979	550	-9.6%	4,454	4,025
	Computer systems design and related services	$43.43	2,472	8,038	22.2%	47,320	57,830
	Management and technical consulting services	$42.65	1,104	1,905	9.9%	30,486	33,495
	Scientific research and development services	$36.30	84	-306	-5.6%	3,994	3,772

Industry Employment Trends, Organized by Sector							
Sector	Industry	Average Hourly Wage, 2013	# Jobs Change Recession 2007-2010	#Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Professional and technical services (cont'd)	Advertising, PR, and related services	$37.80	-1,404	1,363	-0.3%	14,123	14,082
	Other professional and technical services	$19.25	-126	505	2.4%	16,121	16,500
Management of companies and enterprises	Management of companies and enterprises	$45.98	683	6,144	12.9%	52,902	59,729
Administrative and waste services	Office administrative services	$32.08	902	-10	6.3%	14,225	15,117
	Facilities support services	$19.00	1,202	132	26.3%	5,066	6,400
	Employment services	$14.65	-27,780	24,816	-2.1%	140,036	137,072
	Business support services	$22.63	2,635	175	12.3%	22,915	25,725
	Travel arrangement and reservation services	$26.88	-141	286	2.5%	5,692	5,837
	Investigation and security services	$13.20	-720	1,330	2.5%	24,015	24,625
	Services to buildings and dwellings	$12.80	-6,588	5,054	-2.7%	57,460	55,926
	Other support services	$18.13	-1,321	682	-6.6%	9,706	9,067
	Waste management and remediation services	$22.70	-1,307	332	-11.0%	8,863	7,888
Educational services	Educational services (private)	$23.13	5,725	3,726	16.8%	56,303	65,754
Health care and social assistance	Ambulatory health care services	$27.88	10,257	20,460	21.9%	140,507	171,224
	Hospitals	$24.40	7,743	4,492	9.9%	123,171	135,406
	Nursing and residential care facilities	$12.15	2,102	1,869	7.3%	54,377	58,348
	Social assistance	$10.48	2,613	2,493	9.3%	55,189	60,295
Arts, entertainment, and recreation	Performing arts and spectator sports	$39.25	-368	369	0.0%	8,246	8,247
	Museums, historical sites, zoos, and parks	$12.85	-100	236	5.2%	2,611	2,747
	Amusements, gambling, and recreation	$9.38	-2,093	2,695	2.0%	30,610	31,212

Industry Employment Trends, Organized by Sector							
Sector	**Industry**	**Average Hourly Wage, 2013**	**# Jobs Change Recession 2007-2010**	**#Jobs Change Recovery 2010-2013**	**% Employment Change 2007-2013**	**2007 Employment Level**	**2013 Employment Level**
Accommodation and food services	Accommodation	$11.08	-3,353	482	-6.6%	43,685	40,814
	Food services and drinking places	$7.85	-16,399	33,087	5.4%	310,072	326,760
Other services, except public administration	Repair and maintenance	$18.10	-3,734	1,606	-5.7%	37,040	34,912
	Personal and laundry services	$11.60	-2,034	1,355	-1.9%	34,895	34,216
	Membership associations and organizations	$17.23	-1,572	739	-3.6%	23,142	22,309
	Private households	$13.05	-333	-482	-16.5%	4,936	4,121
Unclassified	Unclassified	$28.00	-4,005	3,241	-4.9%	15,441	14,677
PRIVATE SECTOR TOTAL		*$22.85*	*-320,934*	*193,811*	*-3.7%*	*3,405,706*	*3,278,583*
Public Sector							
Public Sector (total)	Federal	$32.70	11,803	-7,563	4.4%	95,842	100,082
	State	$19.95	-7,287	-4,288	-7.5%	153,636	142,061
	Local	$17.85	-6,833	-17,249	-5.7%	422,000	397,918
Public Sector (Educational Services)	Federal	$35.60	115	50	10.1%	1,638	1,803
	State	$23.00	-99	2,120	3.2%	63,894	65,915
	Local	$17.73	-4,002	-15,358	-7.5%	259,009	239,649
Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)							

Industry Employment Trends, Organized by Wage Category						
Industry	Average Hourly Wage 2013	# Jobs Change Recession 2007-2010	# Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Low-Wage Industries						
Food services and drinking places	$7.85	-16,399	33,087	5.4%	310,072	326,760
Clothing and clothing accessories stores	$8.80	-6,323	-1,365	-16.5%	46,464	38,776
Sports, hobby, music instrument, book stores	$9.35	-674	607	-0.4%	17,550	17,483
Amusements, gambling, and recreation	$9.38	-2,093	2,695	2.0%	30,610	31,212
Food and beverage stores	$10.00	-1,753	6,634	6.0%	81,264	86,145
Gasoline stations	$10.45	-2,063	448	-5.6%	29,002	27,387
Social assistance	$10.48	2,613	2,493	9.3%	55,189	60,295
General merchandise stores	$10.53	-1,985	4,013	2.0%	99,408	101,436
Crop production	$10.70	423	-59	3.6%	9,984	10,348
Accommodation	$11.08	-3,353	482	-6.6%	43,685	40,814
Personal and laundry services	$11.60	-2,034	1,355	-1.9%	34,895	34,216
Nursing and residential care facilities	$12.15	2,102	1,869	7.3%	54,377	58,348
Miscellaneous store retailers	$12.45	-3,762	612	-13.3%	23,703	20,553
Transit and ground passenger transportation	$12.63	404	480	18.0%	4,907	5,791
Services to buildings and dwellings	$12.80	-6,588	5,054	-2.7%	57,460	55,926
Museums, historical sites, zoos, and parks	$12.85	-100	236	5.2%	2,611	2,747
Private households	$13.05	-333	-482	-16.5%	4,936	4,121
Investigation and security services	$13.20	-720	1,330	2.5%	24,015	24,625
Fishing, hunting and trapping	$13.68	-28	3	-9.3%	270	245
Furniture and home furnishings stores	$14.28	-5,402	853	-23.5%	19,398	14,849
Employment services	$14.65	-27,780	24,816	-2.1%	140,036	137,072
Apparel manufacturing	$14.80	-1,880	-396	-43.2%	5,271	2,995
Building material and garden supply stores	$15.13	-8,116	141	-18.0%	44,352	36,377
Agriculture and forestry support activities	$15.20	-100	203	2.0%	5,112	5,215
Low-Wage Category Total	**N/A**	**-85,944**	**85,109**	**-0.1%**	**1,144,571**	**1,143,736**
Mid-Wage Industries						
Animal production and aquaculture	$16.40	-260	136	-3.0%	4,197	4,073
Health and personal care stores	$17.00	-1,054	385	-2.3%	29,189	28,520
Membership associations and organizations	$17.23	-1,572	739	-3.6%	23,142	22,309
Furniture and related product manufacturing	$17.93	-4,827	219	-32.2%	14,319	9,711
Repair and maintenance	$18.10	-3,734	1,606	-5.7%	37,040	34,912
Other support services	$18.13	-1,321	682	-6.6%	9,706	9,067
Wood product manufacturing	$18.80	-8,786	813	-34.1%	23,391	15,418
Facilities support services	$19.00	1,202	132	26.3%	5,066	6,400
Electronics and appliance stores	$19.03	-3,007	-569	-22.6%	15,824	12,248

Mid-Wage Industries (continued)						
Industry	Average Hourly Wage 2013	# Jobs Change Recession 2007-2010	# Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Other professional and technical services	$19.25	-126	505	2.4%	16,121	16,500
Textile mills	$19.55	-7,892	-415	-31.1%	26,748	18,441
Warehousing and storage	$19.98	-972	917	-0.2%	27,196	27,141
Forestry and logging	$20.00	-711	-135	-14.5%	5,829	4,983
Textile product mills	$20.18	-8,604	-2,685	-30.2%	37,409	26,120
Nonstore retailers	$20.23	-337	801	5.0%	9,256	9,720
Rental and leasing services	$20.45	-4,195	359	-18.6%	20,574	16,738
Truck transportation	$20.75	-6,311	3,004	-6.7%	49,319	46,012
Motor vehicle and parts dealers	$20.93	-10,844	5,798	-8.0%	63,318	58,272
Support activities for transportation	$21.30	-563	2,843	11.7%	19,497	21,777
Fabricated metal product manufacturing	$21.50	-6,758	3,783	-10.4%	28,595	25,620
Printing and related support activities	$21.65	-5,144	-1,197	-32.2%	19,715	13,374
Specialty trade contractors	$21.98	-43,086	-1,781	-32.6%	137,578	92,711
Motion picture and sound recording industries	$22.18	112	1,249	21.6%	6,300	7,661
Plastics and rubber products manufacturing	$22.40	-4,922	735	-17.7%	23,712	19,525
Business support services	$22.63	2,635	175	12.3%	22,915	25,725
Waste management and remediation services	$22.70	-1,307	332	-11.0%	8,863	7,888
Educational services (private)	$23.13	5,725	3,726	16.8%	56,303	65,754
Heavy and civil engineering construction	$23.68	-11,281	-2,347	-39.9%	34,119	20,491
Primary metal manufacturing	$23.68	-1,570	1,387	-2.5%	7,269	7,086
Nonmetallic mineral product manufacturing	$24.25	-6,688	-988	-35.8%	21,467	13,791
Hospitals	$24.40	7,743	4,492	9.9%	123,171	135,406
Leather and allied product manufacturing	$25.18	14	-6	10.5%	76	84
Real estate	$25.43	-4,741	1,019	-8.7%	42,758	39,036
Food manufacturing	$25.55	-6,304	44	-9.2%	67,858	61,598
Specialized design services	$25.63	-979	550	-9.6%	4,454	4,025
Miscellaneous manufacturing	$25.83	-2,531	155	-17.5%	13,583	11,207
Machinery manufacturing	$26.45	-5,416	1,413	-16.5%	24,199	20,196
Travel arrangement and reservation services	$26.88	-141	286	2.5%	5,692	5,837
Other Transportation	$27.32	125	13	12.5%	1,100	1,238
Couriers and messengers	$27.58	-1,497	896	-3.0%	19,893	19,292
Construction of buildings	$27.63	-17,428	209	-34.8%	49,418	32,199
Mid-Wage Category	**N/A**	**-167,093**	**29,144**	**-12.0%**	**1,151,982**	**1,014,033**

High-Wage Industries						
Industry	Average Hourly Wage 2013	# Jobs Change Recession 2007-2010	# Jobs Change Recovery 2010-2013	% Employment Change 2007-2013	2007 Employment Level	2013 Employment Level
Ambulatory health care services	$27.88	10,257	20,460	21.9%	140,507	171,224
Unclassified	$28.00	-4,005	3,241	-4.9%	15,441	14,677
Accounting & bookkeeping	$28.20	5,171	5,432	35.6%	29,811	40,414
Mining, quarrying, oil & gas	$28.88	-1,932	-236	-31.6%	6,861	4,693
Merchant wholesalers, nondurable	$29.08	-4,067	1,935	-3.4%	62,610	60,478
Petroleum and coal products manufacturing	$29.25	-71	-46	-10.7%	1,095	978
Beverage and tobacco product manufacturing	$30.45	-340	823	13.4%	3,595	4,078
Transport equipment manufact.	$31.63	-4,762	7,416	6.3%	41,899	44,553
Chemical manufacturing	$32.05	-2,001	104	-8.9%	21,229	19,332
Office administrative services	$32.08	902	-10	6.3%	14,225	15,117
Paper manufacturing	$32.25	-2,573	-56	-12.3%	21,366	18,737
Electrical equipment and appliance manufacturing	$34.43	-4,071	714	-22.4%	14,990	11,633
Merchant wholesalers, durable	$34.43	-17,240	2,456	-13.0%	113,864	99,080
Legal services	$36.15	-2,758	1,708	-3.3%	31,816	30,766
Scientific research & development	$36.30	84	-306	-5.6%	3,994	3,772
Lessors of nonfinancial intangible assets	$37.13	-102	-90	-14.5%	1,323	1,131
Architecture & engineering service	$37.40	-6,066	2,035	-9.9%	40,791	36,760
Advertising, PR, & related services	$37.80	-1,404	1,363	-0.3%	14,123	14,082
Finance and insurance	$37.93	-18,555	11,803	-4.1%	163,390	156,638
Air transportation	$38.75	263	-45	0.6%	38,656	38,874
Other information services	$38.78	832	828	113.5%	1,463	3,123
Performing arts & spectator sports	$39.25	-368	369	0.0%	8,246	8,247
Utilities	$39.30	-903	93	-3.9%	20,573	19,763
Electronic markets and agents and brokers	$39.38	-2,105	3,875	4.1%	43,216	44,986
Telecommunications	$40.13	-2,189	-1,384	-6.9%	51,853	48,280
Computer and electronic product manufacturing	$42.00	-2,727	681	-15.5%	13,179	11,133
Management and technical consulting services	$42.65	1,104	1,905	9.9%	30,486	33,495
Computer systems design and related services	$43.43	2,472	8,038	22.2%	47,320	57,830
Publishing industries, except Internet	$43.53	-4,406	-716	-17.8%	28,764	23,642
Broadcasting, except Internet	$44.50	-1,815	160	-11.3%	14,586	12,931
Data processing, hosting and related services	$44.98	-4,944	727	-39.1%	10,788	6,571
Management of companies and enterprises	$45.98	683	6,144	12.9%	52,902	59,729
High-Wage Category	**N/A**	**-67,636**	**79,421**	**1.1%**	**1,104,962**	**1,116,747**
Total Private	**$22.85**	**-320,934**	**193,811**	**-3.7%**	**3,405,706**	**3,278,583**
Source: GBPI analysis of Quarterly Census of Employment and Wages (QCEW)						