

TOURISM



**Maryland Department of Labor, Licensing and Regulation
Division of Workforce Development
Office of Workforce Information and Performance
1100 N. Eutaw Street, Room 316
Baltimore, MD 21201**

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Tourism Cluster

What is included in the Tourism Cluster?

The Tourism Cluster consists of industries that provide services to tourists--both local residents and travelers--in the areas of scenic transportation, travel arrangement, and amusement and recreation-related activities. This report groups industries included in the Tourism Cluster into three divisions:

Scenic and Sightseeing Transportation establishments utilize different modes of transportation to provide recreation and entertainment services. Transportation is usually local and involves same-day return to place of departure. Included are the industries of:

NAICS

- **4871** Scenic and sightseeing transportation, land – includes sightseeing buses and trolleys
- **4872** Scenic and sightseeing transportation, water – includes harbor tours and charter fishing boat services
- **4879** Scenic and sightseeing transportation, other – includes hot air balloon rides, glider excursions

Travel Arrangement and Reservation Services includes establishments that act as agents in selling travel, tour, and accommodation services. Also included are businesses engaged in arranging and assembling tours and businesses providing other travel arrangement and reservation services such as car rental and event ticket sales.

NAICS

- **5615** Travel Arrangement and Reservation Services

Performing Arts, Spectator Sports, and Related Industries includes businesses that operate facilities or provide services to meet a variety of cultural, entertainment, and recreational interests of consumers. This sector is comprised of establishments that produce, promote, or participate in live performances, events, or exhibits intended for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and establishments that operate facilities or provide services in the areas of recreational activities, amusements, hobby and other leisure-time pursuits. Included are:

NAICS

- **7111** Performing arts companies
- **7112** Spectator sports
- **7113** Promoters of performing arts and sports
- **7114** Agents and managers for artists, athletes, entertainers, and other public figures
- **7115** Independent artists, writers, and performers
- **7121** Museums, historical sites, zoos, nature parks and gardens
- **7131** Amusement parks and arcades
- **7132** Gambling industries
- **7139** Other amusement and recreation industries

For additional descriptive information on NAICS, go to www.census.gov/epcd/naics02/

This publication was developed using data from the Quarterly Census of Employment and Wages (ES 202) and from the Occupational Employment Statistics (OES) Programs.

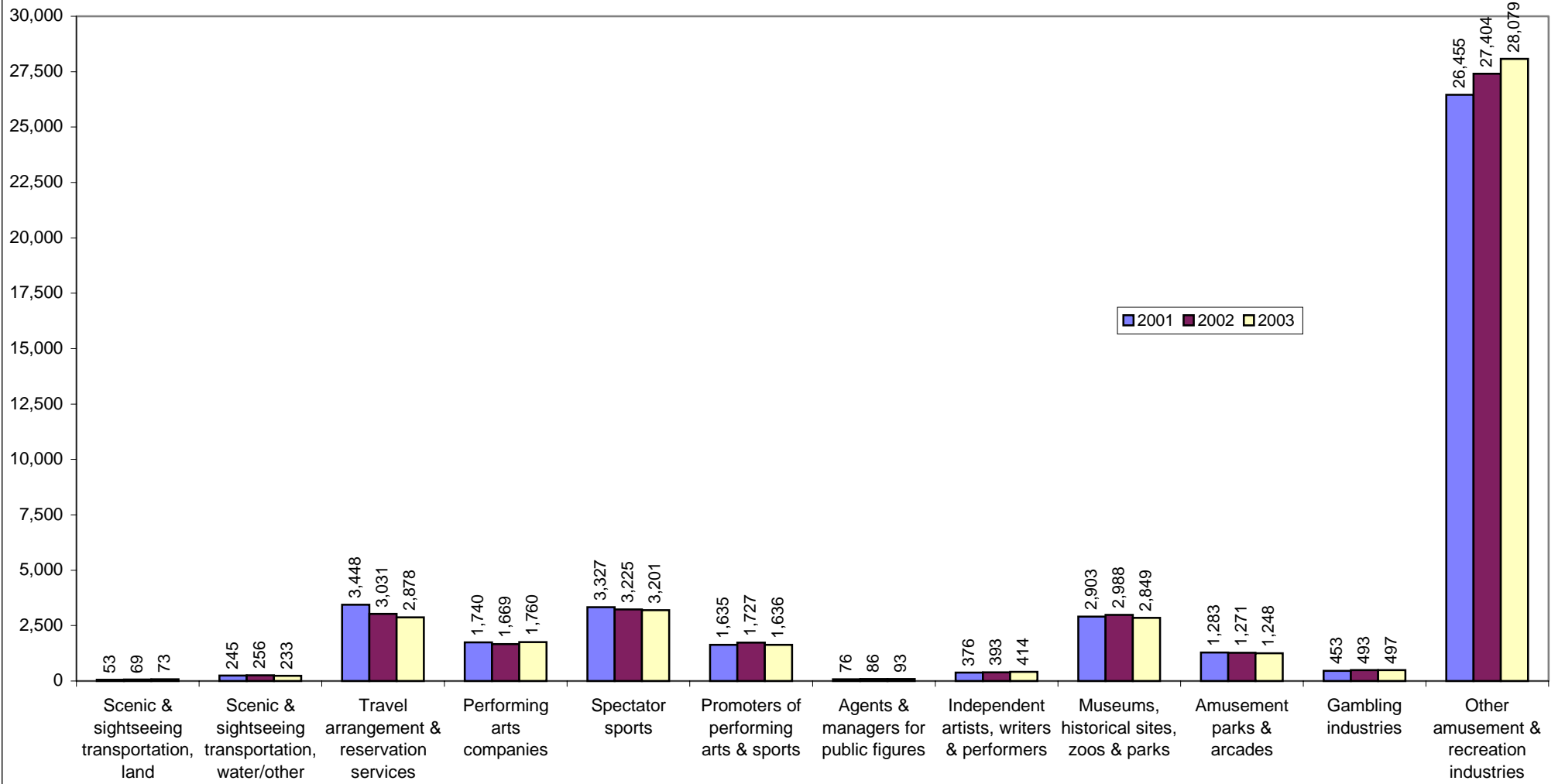
Maryland
Employment and Wages in the Tourism Cluster Industries

NAICS	Industry Description	Employment			Payroll			Average Weekly Wage
		2001	2002	2003	2001	2002	2003	2003
	Tourism	42,501	43,150	43,573	\$1,004,199,757	\$1,015,415,941	\$1,038,134,896	\$458
	Scenic & Sightseeing Transportation	298	325	306	5,084,070	5,242,332	5,174,089	325
4871	Scenic & sightseeing transp., land	53	69	73	963,182	1,283,750	1,370,914	361
4872/4879	Scenic & sightseeing transp., water/other	245	256	233	4,120,888	3,958,582	3,803,175	314
5615	Travel Arrangement & Reservation Services	3,448	3,031	2,878	96,599,913	84,185,326	81,984,767	548
	Performing Arts, Spectator Sports & Related Industries	38,248	39,256	39,777	885,356,311	903,850,088	928,456,743	449
7111	Performing arts companies	1,740	1,669	1,760	36,261,783	37,424,255	37,714,506	412
7112	Spectator sports	3,327	3,225	3,201	220,878,163	208,021,761	214,071,648	1,286
7113	Promoters of performing arts/sports	1,635	1,727	1,636	35,797,793	33,753,087	34,747,840	408
7114	Agents/managers for public figures	76	86	93	5,303,574	5,291,546	4,748,231	982
7115	Indep. artists, writers, performers	376	393	414	18,427,999	18,737,271	18,994,176	882
7121	Museums, hist. sites, zoos, parks	2,903	2,988	2,849	79,738,595	84,846,084	84,880,780	573
7131	Amusement parks & arcades	1,283	1,271	1,248	16,778,732	16,929,843	16,614,680	256
7132	Gambling industries	453	493	497	6,306,455	7,317,980	5,590,548	216
7139	Other amusement & recreation industries	26,455	27,404	28,079	465,863,217	491,528,261	511,094,334	350
N/A	Nondistributable*	507	538	612	17,159,463	22,138,195	22,519,297	708

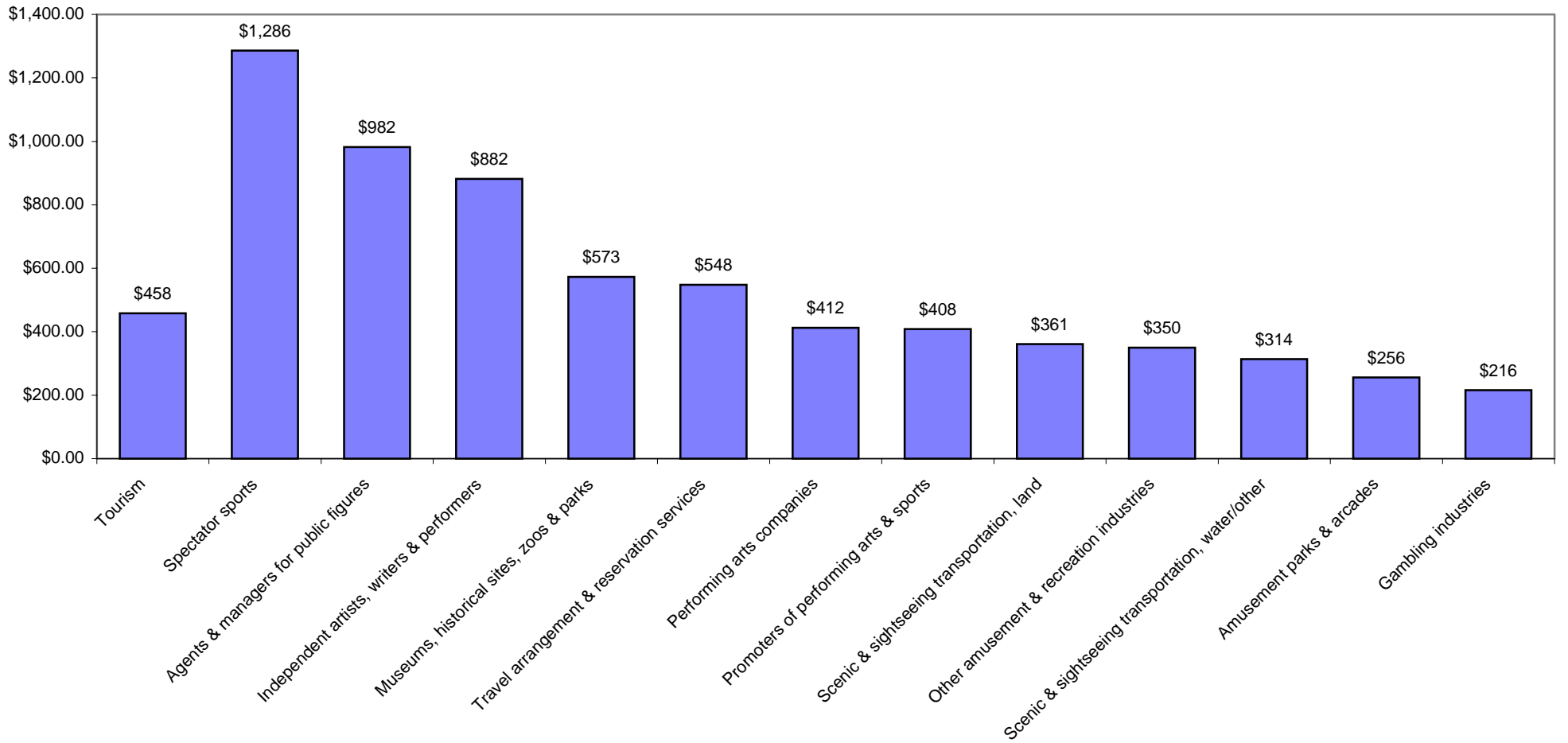
- Jobs in the tourism cluster account for just under 2% of Maryland's employment base. About 9 out of every 10 jobs in the cluster are within the performing arts, spectator sports and related industries.
- Nearly 1,100 jobs were created by tourism businesses through 2003. Expansion, however, was limited to just a few employment sectors. Gains in other amusement and recreation industries, a grouping which includes golf courses and fitness centers to name a few, contributed the largest numbers of new jobs. Expansion in this miscellaneous category helped to offset declines elsewhere and to move employment in this seasonal and somewhat economically sensitive cluster ahead.

* Includes establishments in all tourism cluster NAICS industries that cannot be distributed geographically.

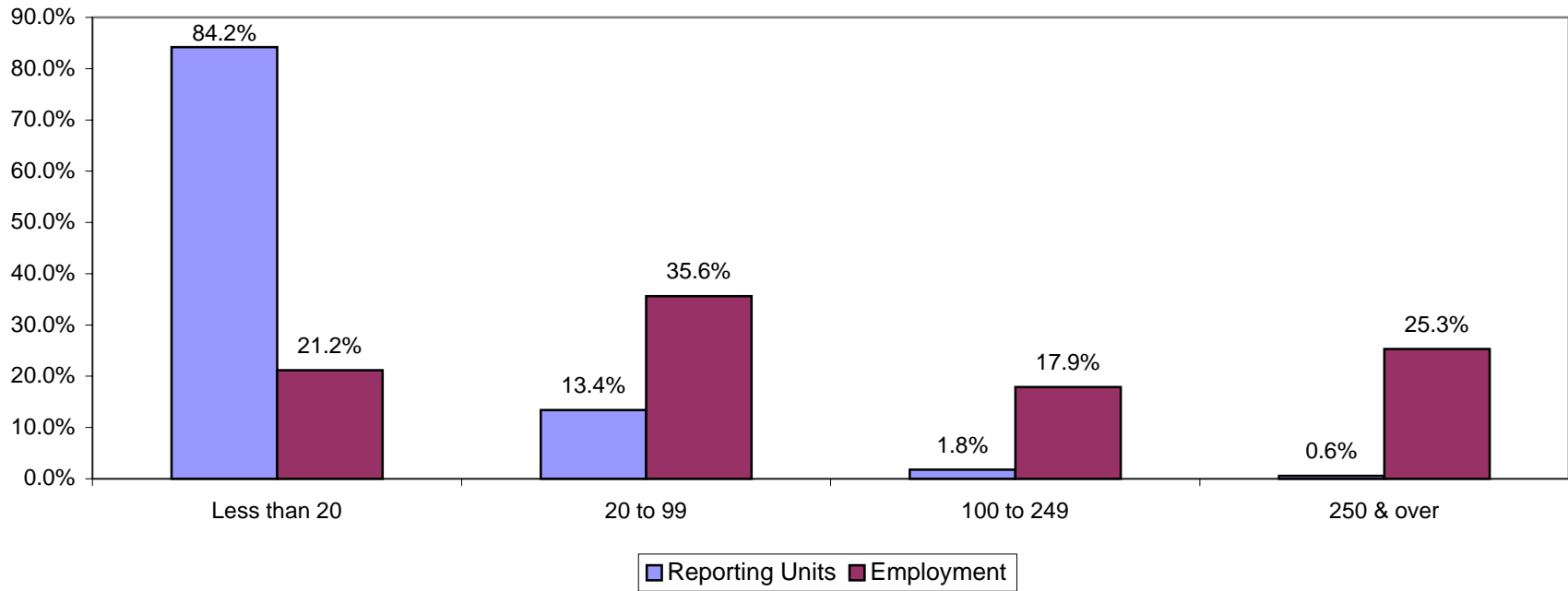
Maryland Employment in the Tourism Cluster Industries - 2001 - 2003



Maryland
Average Weekly Wage in Tourism Cluster Industries - 2003



Maryland
Reporting Units and Employment Concentration in the Tourism Cluster by Size Class*
Based on 4th Quarter 2003 Average Employment



	Reporting Units				Employment			
	Less than 20	20 to 99	100 to 249	250 & over	Less than 20	20 to 99	100 to 249	250 & over
Tourism Cluster	2,255	360	48	15	8,694	14,589	7,322	10,381
Percent of Total	84.2%	13.4%	1.8%	0.6%	21.2%	35.6%	17.9%	25.3%

- About 8 out of every 10 business establishments in the tourism cluster are manned by less than twenty workers.
- The highest concentrations of workers in tourism-related industries can be found in the 20 to 99 and the 250 & over size classes. These two business size classes, when combined, provide employment for about 6 out of every 10 workers in tourism industries.

* Includes establishments in all tourism cluster NAICS industries that cannot be distributed geographically.

Maryland
Occupations Typically Associated with the Tourism Cluster

Occupation	Annual Openings *	Annual Replacements *	Annual Openings Total *	Training Code	Median Hrly/Annual Wage
Amusement and Recreation Attendants	130	115	245	11	\$7.25
Landscaping and Groundskeeping Workers	675	435	1,110	11	10.75
Fitness Trainers and Aerobics Instructors	175	75	250	7	11.00
Waiters and Waitresses	685	1,965	2,650	11	6.75
Cashiers	955	3,045	4,000	11	8.50
Food Preparation Workers	415	480	895	11	9.00
Janitors and Cleaners	1,165	745	1,910	11	8.75
Security Guards	760	490	1,250	11	11.25
Bartenders	25	315	340	11	7.25
General and Operations Managers	1,420	1,230	2,650	4	35.50
Supervisors, Personal Care and Service Workers	50	95	145	8	13.75
Receptionists and Information Clerks	690	610	1,300	11	11.00
Maintenance and Repair Workers, General	370	390	760	10	15.00
Ushers, Lobby Attendants and Ticket Takers	20	120	140	11	7.25
Musicians and Singers	5	15	20	9	58,850
Coaches and Scouts	55	45	100	9	34,050
Umpires, Referees and Related Sports Officials	0	0	0	9	29,925
Secretaries, exc. Medical and Legal	230	835	1,065	10	13.75
General Office Clerks	695	1,165	1,860	11	12.50
Counter and Rental Clerks	205	335	540	11	10.00
Producers and Directors	20	15	35	4	51,725
Laborers and Freight, Stock and Material Movers	175	1,280	1,455	11	10.50
Recreation Workers	120	145	265	11	10.25
Travel Agents	0	35	35	7	10.75
Reservation & Transportation Ticket Agents/Travel Clerks	40	40	80	11	12.00
Tour Guides and Escorts	0	10	10	10	12.50
Meeting and Convention Planners	25	25	50	5	20.75

Wages adjusted to reflect inflationary pressures through September 2004.

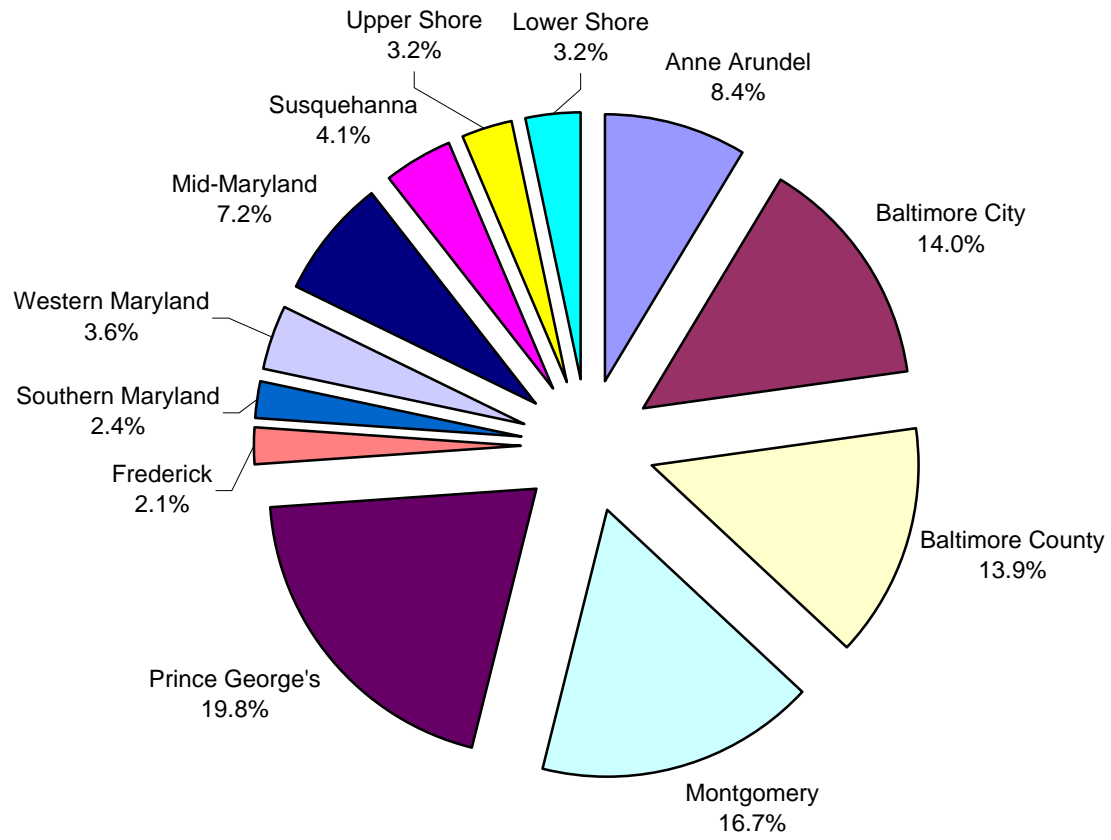
* Represents economy-wide demand 2002 - 2012

Education and Training Categories

Occupations are classified into 1 of 11 categories by the Bureau of Labor Statistics based on analyses of the occupation's usual education and training requirements conducted while developing information to present in the *Occupational Outlook Handbook*. The 11 classifications are as follows:

- 1 **First professional degree.** Completion of the academic program usually requires at least 6 years of full-time equivalent academic study, including college study prior to entering the professional degree program.
- 2 **Doctoral degree.** Completion of the degree program usually requires at least 3 years of full-time equivalent academic work beyond the bachelor's degree.
- 3 **Master's degree.** Completion of the degree program usually requires 1 or 2 years of full-time equivalent study beyond the bachelor's degree.
- 4 **Work experience, plus a bachelor's or higher degree.** Most occupations in this category are managerial occupations that require experience in a related nonmanagerial position.
- 5 **Bachelor's degree.** Completion of the degree program generally requires at least 4 years but not more than 5 years of full-time equivalent academic work.
- 6 **Associate degree.** Completion of the degree program usually requires at least 2 years of full-time equivalent academic study.
- 7 **Postsecondary vocational training.** Some programs last only a few weeks while others may last more than a year. In some occupations, a license is needed that requires passing an examination after completion of the training.
- 8 **Work experience in a related occupation.** Some occupations requiring work experience are supervisory or managerial occupations.
- 9 **Long-term on-the-job training.** This category includes occupations that generally require more than 12 months of on-the-job training or combined work experience and formal classroom instruction for workers to develop the skills needed for average job performance. This category includes formal and informal apprenticeships that may last up to 4 years and short-term intensive employer-sponsored training that workers must successfully complete. Individuals undergoing training are generally considered to be employed in the occupation. This category includes occupations in which workers may gain experience in non-work activities, such as professional athletes who gain experience through participation in athletic programs in academic institutions.
- 10 **Moderate-term on-the-job training.** This category includes occupations in which workers can develop the skills needed for average job performance after 1 to 12 months of combined on-the-job experience and informal training.
- 11 **Short-term on-the-job training.** This category covers occupations in which workers can develop the skills needed for average job performance after a short demonstration or up to one month of on-the-job experience or instruction.

Tourism Cluster - 2003

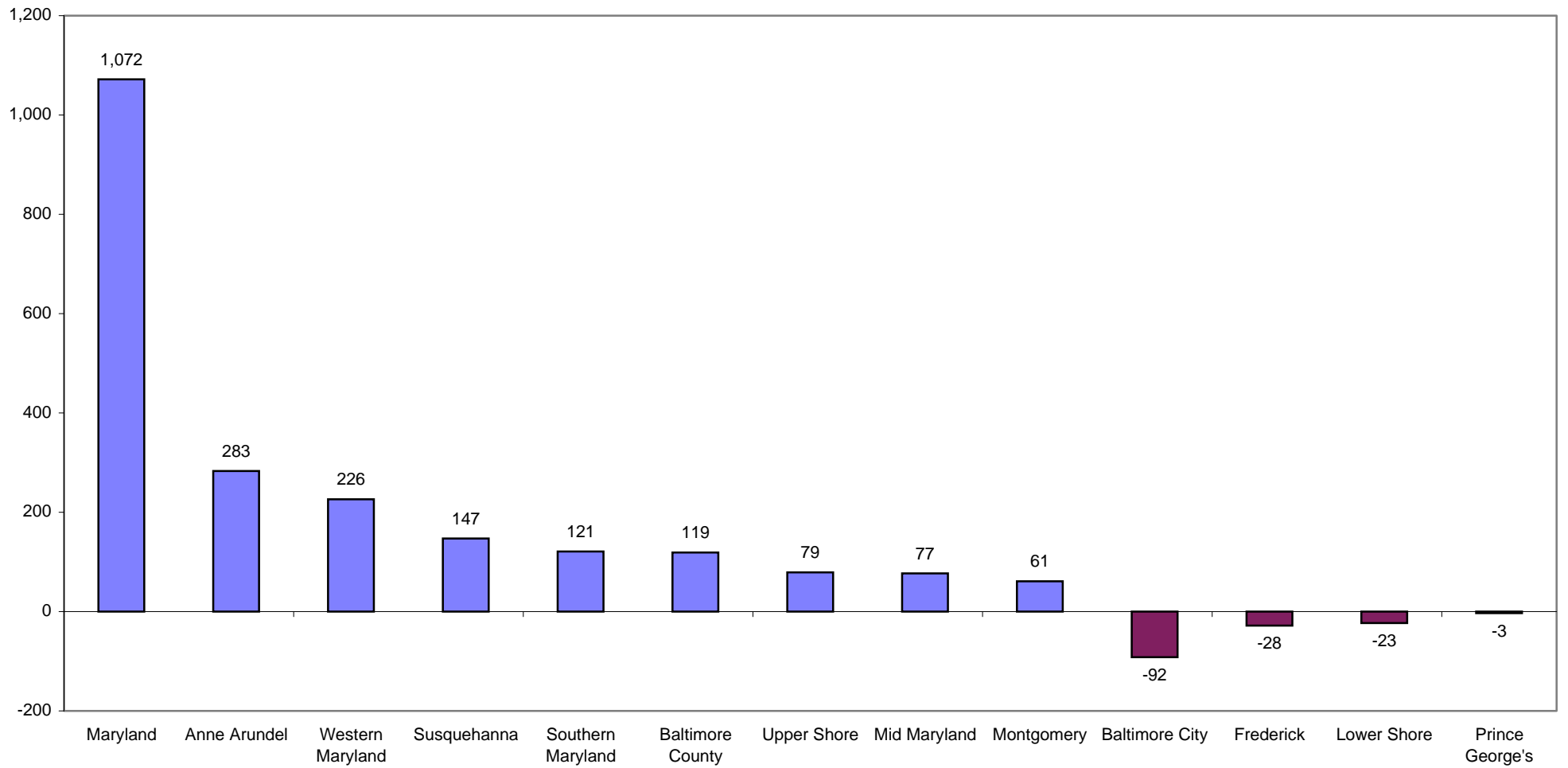


**Employment and Wages in the Tourism Cluster
By WIA and Local Jurisdiction**

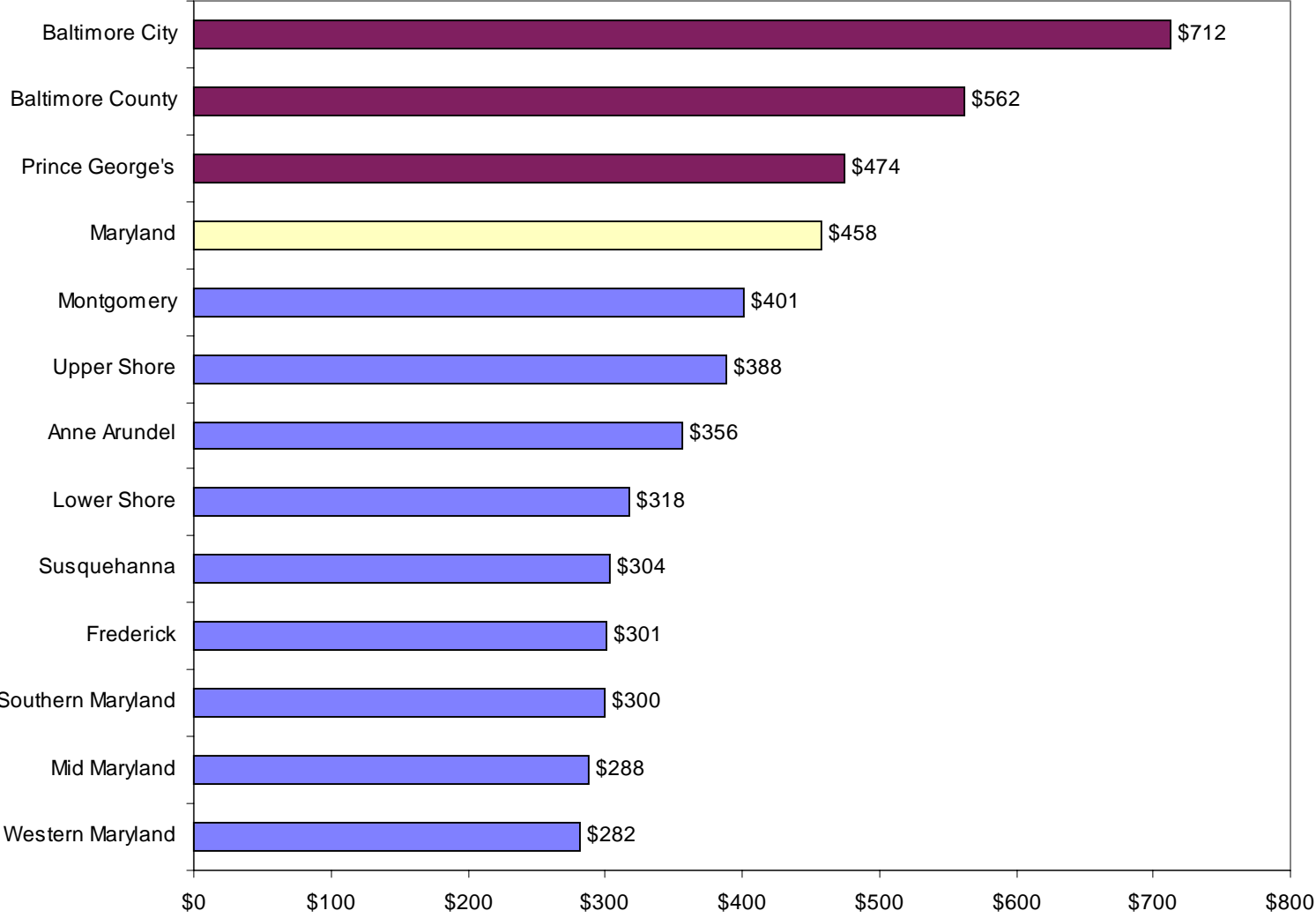
WIA	Employment			Employment Change 2001 - 2003	Number of Reporting Units 2003	Total Wages 2003	Average Weekly Wage 2003
	2001	2002	2003				
Anne Arundel	3,393	3,421	3,676	283	284	\$68,035,475	\$356
Baltimore City	6,190	6,291	6,098	-92	227	225,831,610	712
Baltimore County	5,950	6,011	6,069	119	342	177,415,227	562
Frederick	924	898	896	-28	84	14,010,749	301
Montgomery	7,215	7,362	7,276	61	505	151,829,670	401
Prince George's	8,643	8,638	8,640	-3	212	213,129,713	474
Lower Shore	1,409	1,378	1,386	-23	128	22,912,063	318
Somerset	27	28	24	-3	9	304,279	244
Wicomico	249	248	277	28	36	3,342,962	232
Worcester	1,133	1,102	1,085	-48	83	19,264,822	341
Mid Maryland	3,041	3,092	3,118	77	195	46,755,856	288
Carroll	587	690	740	153	59	8,517,173	221
Howard	2,454	2,402	2,378	-76	136	38,238,683	309
Southern Maryland	913	953	1,034	121	108	16,104,288	300
Calvert	311	341	372	61	40	5,652,494	292
Charles	263	254	245	-18	32	3,663,270	288
St Mary's	339	358	417	78	36	6,788,524	313
Susquehanna	1,638	1,713	1,785	147	156	28,194,525	304
Cecil	528	585	557	29	67	12,529,515	433
Harford	1,110	1,128	1,228	118	89	15,665,010	245
Upper Shore	1,318	1,391	1,397	79	141	28,160,151	388
Caroline	57	73	73	16	11	1,017,189	268
Dorchester	205	207	231	26	19	3,266,481	272
Kent	330	341	340	10	31	7,470,418	423
Queen Anne's	329	383	382	53	42	9,770,750	492
Talbot	397	387	371	-26	38	6,635,313	344
Western Maryland	1,360	1,464	1,586	226	117	23,236,272	282
Allegany	232	269	268	36	34	3,556,709	255
Garrett	297	329	412	115	23	5,858,365	273
Washington	831	866	906	75	60	13,821,198	293
Nondistributable*	507	538	612	105	171	22,519,297	708
Maryland	42,501	43,150	43,573	1,072	2,670	\$1,038,134,896	\$458

* Includes establishments in all tourism cluster NAICS industries that cannot be distributed geographically.

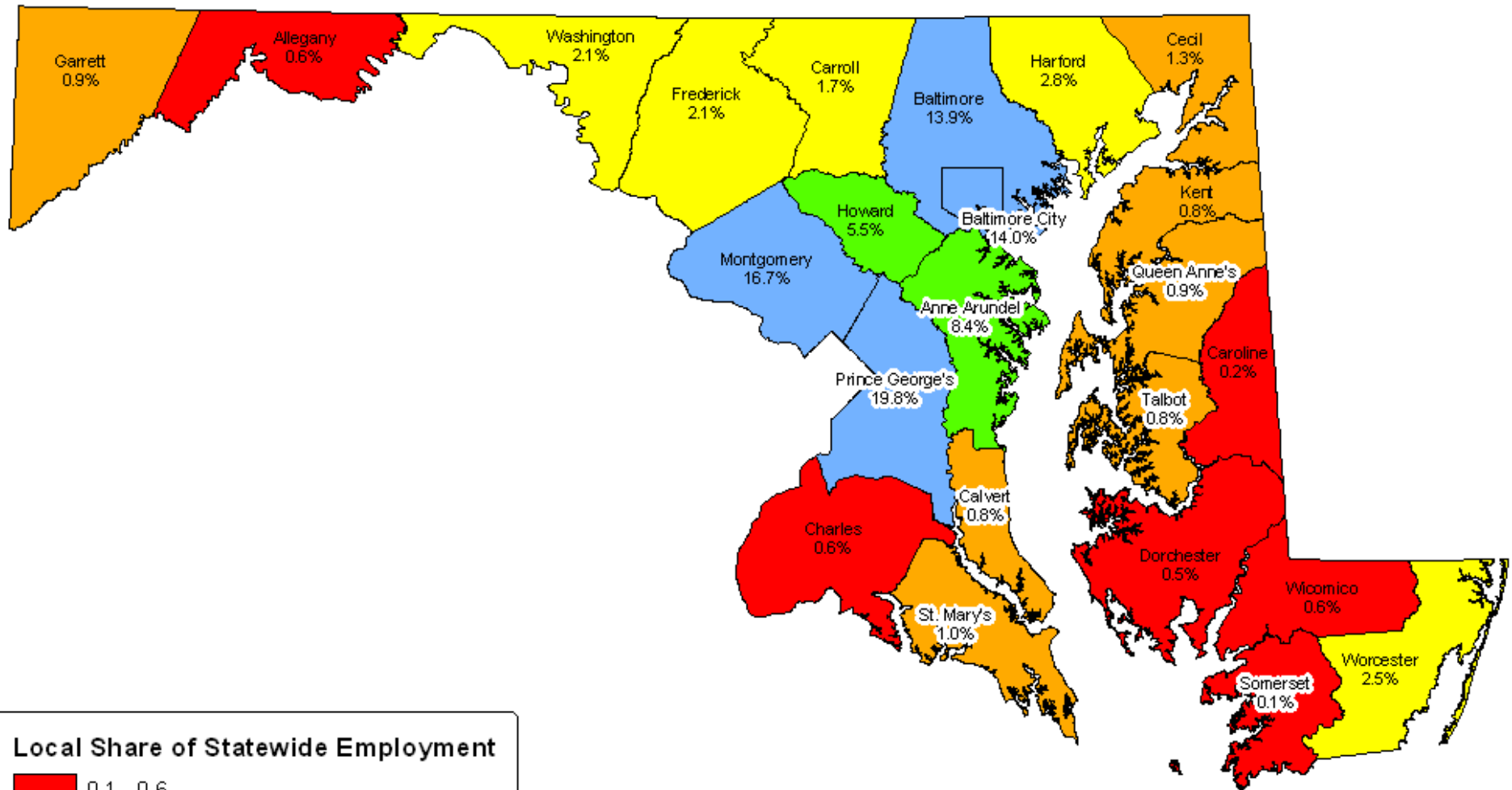
Employment Changes in the Tourism Cluster by WIA 2001 - 2003



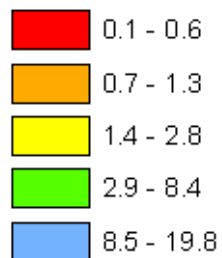
Average Weekly Wage in the Tourism Cluster by WIA - 2003



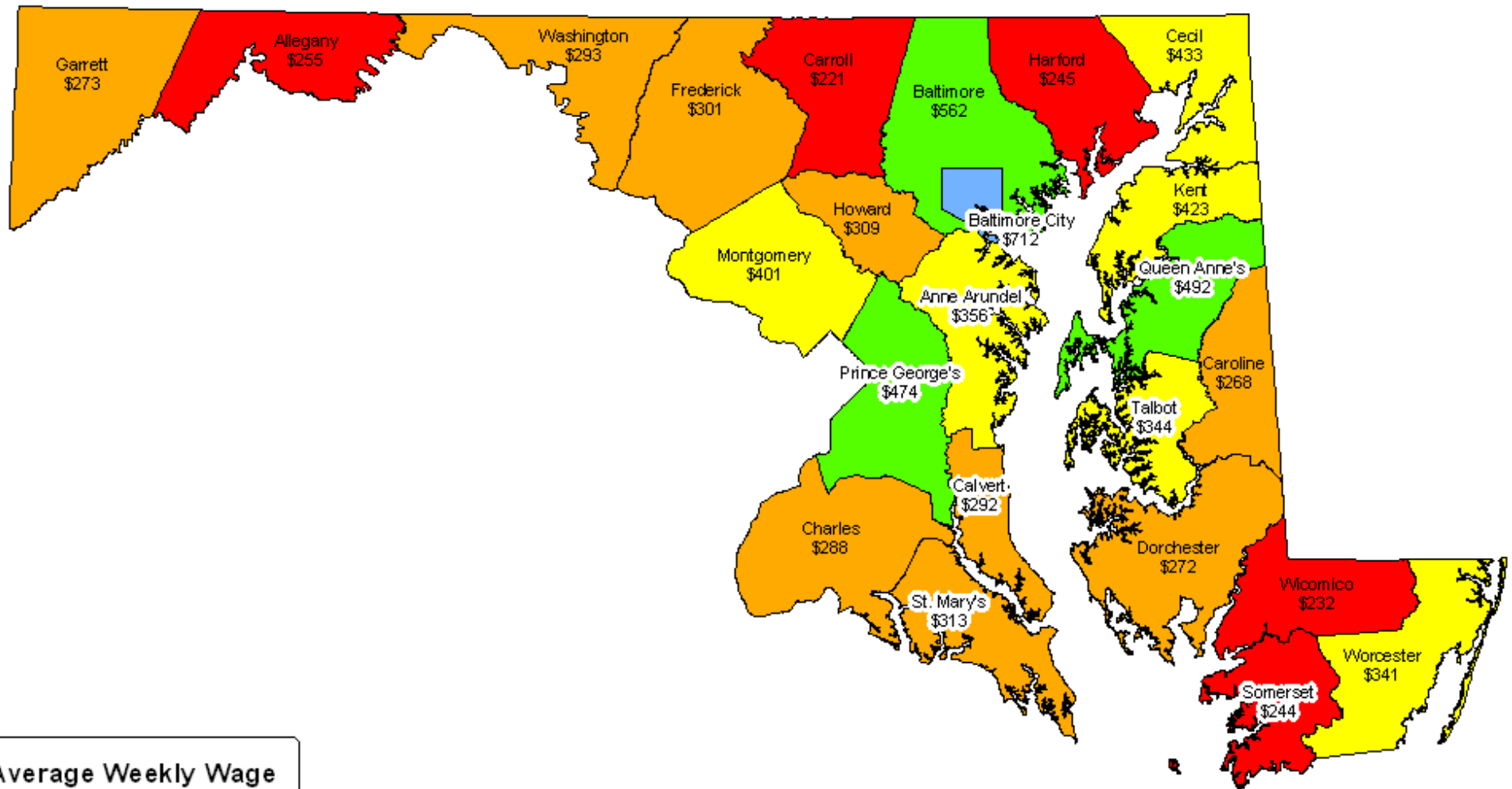
Local Share of Statewide Employment in the Tourism Cluster 2003



Local Share of Statewide Employment



Average Weekly Wage in the Tourism Cluster by Local Jurisdictions 2003



Average Weekly Wage

- \$221 - \$255
- \$256 - \$313
- \$314 - \$433
- \$434 - \$562
- \$563 - \$712