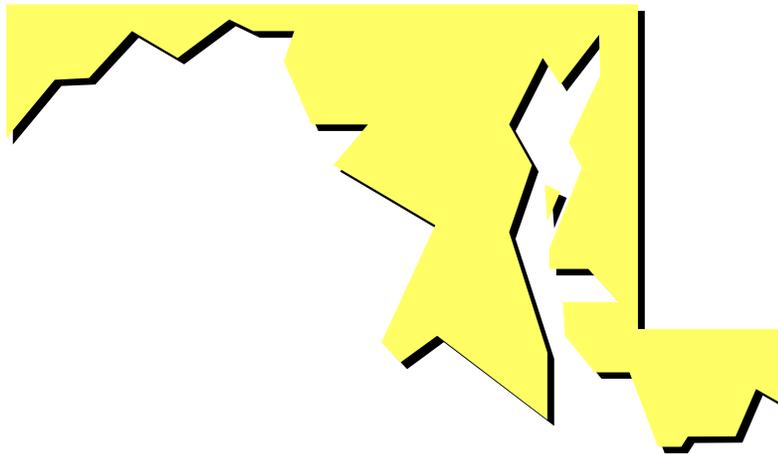


WHO'S WORKING IN MARYLAND:



AN OVERVIEW OF THE STATE'S PRIVATE SECTOR WORKFORCE



**Maryland Department of Labor, Licensing & Regulation
Office of Workforce Information & Performance**

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INTRODUCTION

In 2007 there were more than 2,076,000 jobs, including full and part-time, permanent as well as temporary, on Maryland's private sector payrolls. Analyses of at-place employment typically focus on the number of jobs by industry and industry rank in the labor market. This report presents an overview of the workforce staffing those positions—their age, gender, and industry of employment. When examining the data, it becomes clear that the demographic make up of one industry's workforce may differ markedly from that of another industry. A top employer for one group may rank far down on the list for another. Some industries have come to be identified as employers of a particular population group — Health Care and Social Assistance with women, for example, and Retail Trade with young workers—and indeed both characterizations are true. This report details the age and sex distribution of these and Maryland's other top industry sectors. The largest employers for each worker category are also tabulated.

Adding demographic characteristics to employment numbers enriches traditional labor market information and may benefit business leaders, economic developers and planners, as well as workforce development professionals. Knowing who comprises an industry's workforce lends itself to efficiency in recruitment by helping employers to target their efforts. But, also being cognizant of underrepresented groups may reveal potential untapped worker pools for industries facing labor shortages. Identifying "graying" workplaces creates the opportunity to prepare for the impact of losing not only employees but institutional knowledge as retirements increase.

This report was prepared using data from the Local Employment Dynamics (LED) program, a labor market information partnership of the U.S. Census Bureau and participating states. Using government administrative records, LED produces quarterly at-place employment measures which provide a unique job market perspective by adding demographic characteristics (gender and age group) to workforce statistics. Jobs and job market transactions are tabulated, not individuals in the labor force. Therefore, a person holding more than one job and/or involved in multiple employment transactions will be counted for each. LED supplies eight workforce indicators online for each state which can be accessed by going to: <http://lehd.did.census.gov/led>. This report analyzes the workforce through one indicator, employment by industry sector, distributed by age and sex.

The LED database includes employment covered by the Unemployment Insurance Law of Maryland, as reported through the Quarterly Census of Employment and Wages (QCEW) and the Unemployment Insurance (UI) wage record file, which provide information on employers and employees, respectively. Supplemental employer data and demographic characteristics of workers are derived from Census Bureau sources.

WORKFORCE OVERVIEW

Maryland was location to an average of 2,076,276 private sector payroll jobs in 2007. The total number varied throughout the year, due to a combination of seasonal industry changes and general economic growth. Jobs peaked in the third quarter. Third quarter jobs were up for most age groups, but the bulk of the gain was comprised of younger workers. This is not surprising considering that labor force participation of young workers rises in the summer primarily because:

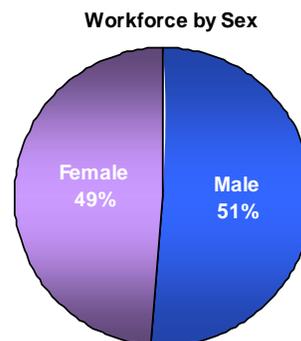
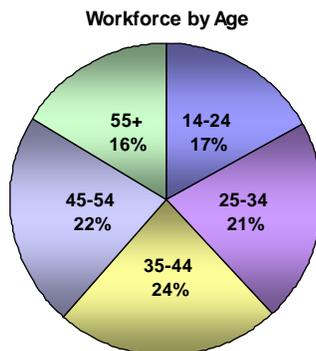
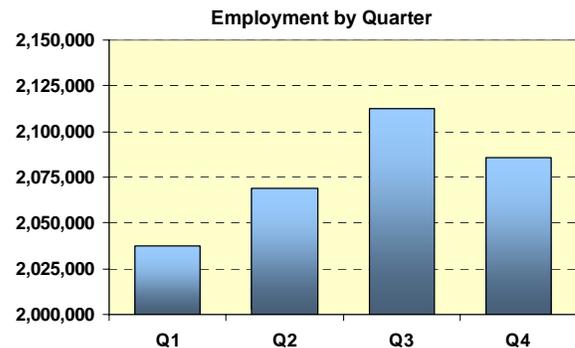
- the youth labor force increases as students become available for work, and
- more job opportunities open up in industries often staffed mainly by young workers (e.g., food services, amusement and recreation) expand for the season.

While young workers typically experience the greatest instability in the job market (often moving in and out of the labor market and/or changing employers several times a year), workers of all ages enter and exit the workforce continually. Behind the static employment numbers is a very dynamic job market.

Employees in the prime working age category (25-54 years)—so-called because this group has the highest labor force participation rates—held two-thirds of all jobs. Younger and older workers held nearly comparable employment shares, accounting for about 17% and 16% of the workforce, respectively.

Employment was distributed fairly evenly by gender. For the year, male workers averaged 1,064,939 jobs, female workers 1,011,337—a difference of 53,602. Among 14-24 year olds, however, female workers exceeded males. There were no notable differences between the sexes with regard to quarterly employment trends; job flow patterns were similar.

Private Sector Workforce			
Age Group	Male	Female	Total Workers
All ages	1,064,939	1,011,337	2,076,276
14-24	172,067	181,543	353,612
25-34	225,901	213,431	439,333
35-44	251,292	229,632	480,924
45-54	237,734	225,131	462,865
55+	177,942	161,597	339,541



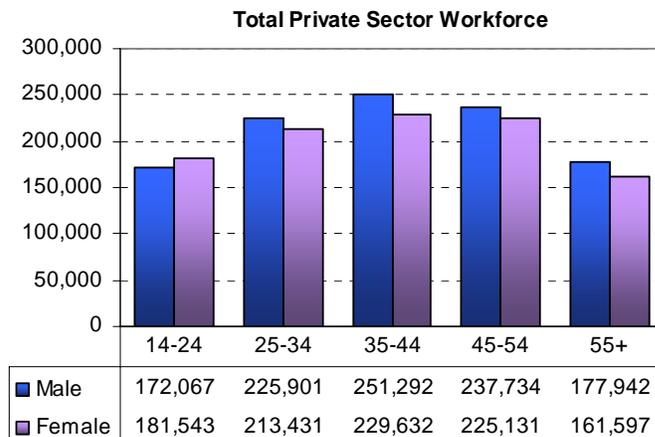
It should be noted that employment growth, whether seasonal or permanent, may include both the formerly jobless and existing workers taking additional positions. On average, about 6% of Maryland's workers were multiple jobholders in 2007. Jobs creation, therefore, does not translate directly into an equal number of new workers.

INDUSTRY WORKFORCE TRENDS

The top four sectors in the private economy—Retail Trade, Health Care & Social Assistance, Professional, Scientific & Technical Services, and Accommodation & Food Services—accounted for over a million jobs—about 49% of the workforce. The eight largest sectors (each with more than 100,000 positions) were responsible for almost 1.6 million jobs—nearly 77% of employment.

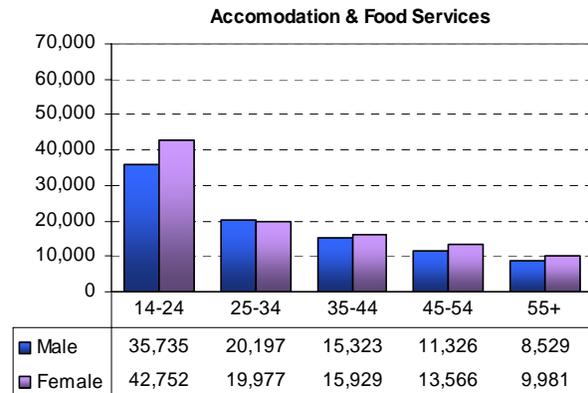
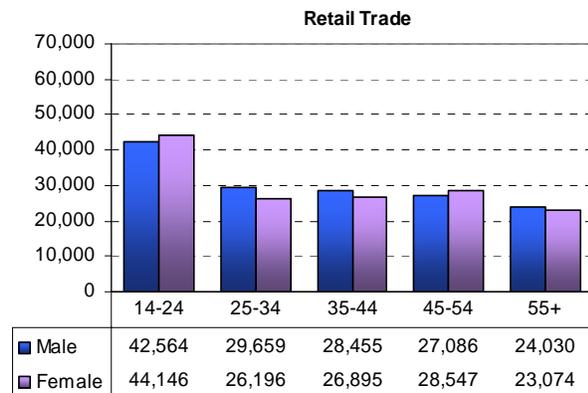
Rank	NAICS Code	Employment by Industry Sector	Jobs
1	44-45	Retail Trade	300,656
2	62	Health Care & Social Assistance	297,467
3	54	Professional, Scientific & Technical Svcs.	221,607
4	72	Accommodation & Food Services	193,322
5	23	Construction	180,584
6	56	Administrative & Support & Waste Mgmt. & Remediation Svcs.	154,579
7	31-33	Manufacturing	132,941
8	52	Finance & Insurance	108,390
9	42	Wholesale Trade	95,809
10	81	Other Services	89,386
11	48-49	Transportation & Warehousing	67,796
12	61	Educational Services	59,062
13	51	Information	53,320
14	53	Real Estate, Rental & Leasing	47,986
15	71	Arts, Entertainment & Recreation	36,568
16	55	Management of Companies & Enterprises	20,476
17	22	Utilities	9,879
18	11	Agriculture, Forestry, Fishing & Hunting	4,805
19	21	Mining, Quarrying, Oil & Gas Extraction	1,631

Demographically, total employment followed a rather flat bell curve, peaking at the 35-44 years age group, with comparable numbers in each age category for both sexes. But an individual analysis of the largest industry sectors reveals sometimes widely varying staffing patterns between men and women and among age groups. Generally this is a function of the occupations that make up an industry. A sector comprised of jobs traditionally dominated by one sex will be populated mainly by that group. An industry with entry-level and part time positions will tend to attract younger workers. The greater an industry's share of strongly gender or age-typed occupations, the more its staffing pattern deviates from the average.

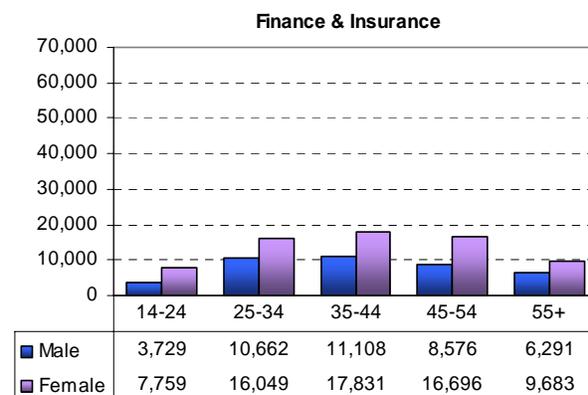
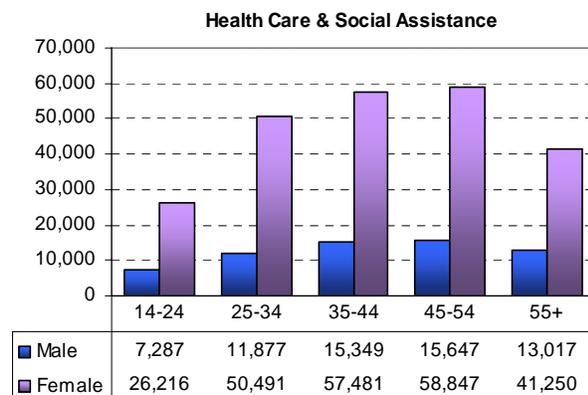


Following is an analysis of worker characteristics for Maryland's eight largest industry sectors. Demographically, each sector's workforce creates a unique staffing pattern.

Retail Trade, and **Accommodation & Food Services** (the first and fourth largest employers) both offer positions for entry-level workers, with part-time evening and weekend schedules that accommodate students (as well as those seeking second jobs), thus attracting a much younger workforce than average. Workforce age trends run counter to the average, with numbers declining in the prime working years. These two sectors often provide an introduction to the job market for beginning workers who go on to find careers in other fields.

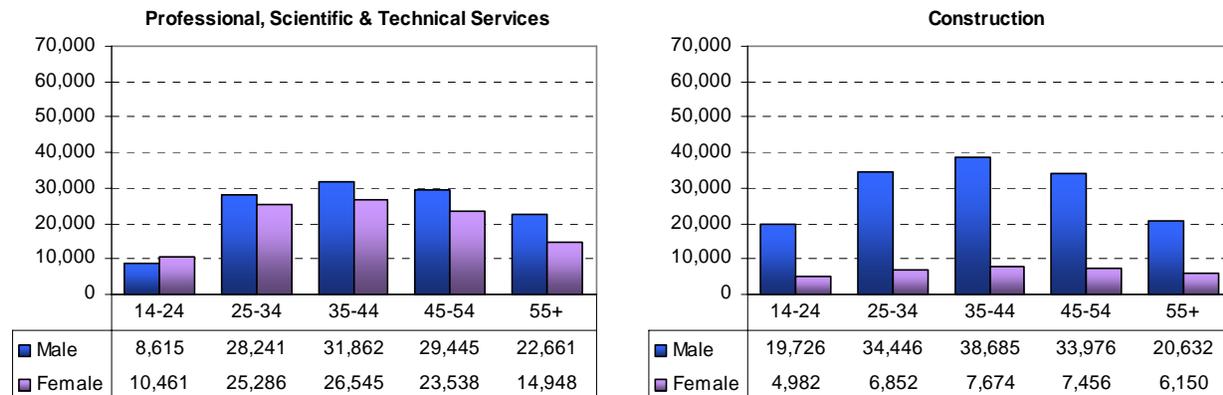


Health Care & Social Assistance (the second largest employer) is the state's most female-dominated industry, with a 79% female workforce. Many of its common occupations are usually identified with women—nurses, nursing aides, medical office clerical staff, social workers, and a host of other healthcare providing jobs. Many doctors and therapists (who are increasingly female) are self-employed and therefore outside the scope of this data. **Finance & Insurance** (the eighth largest employer) is another predominantly female industry (about 63%), mainly due to its high number of clerical and administrative support occupations which are typically staffed by women.



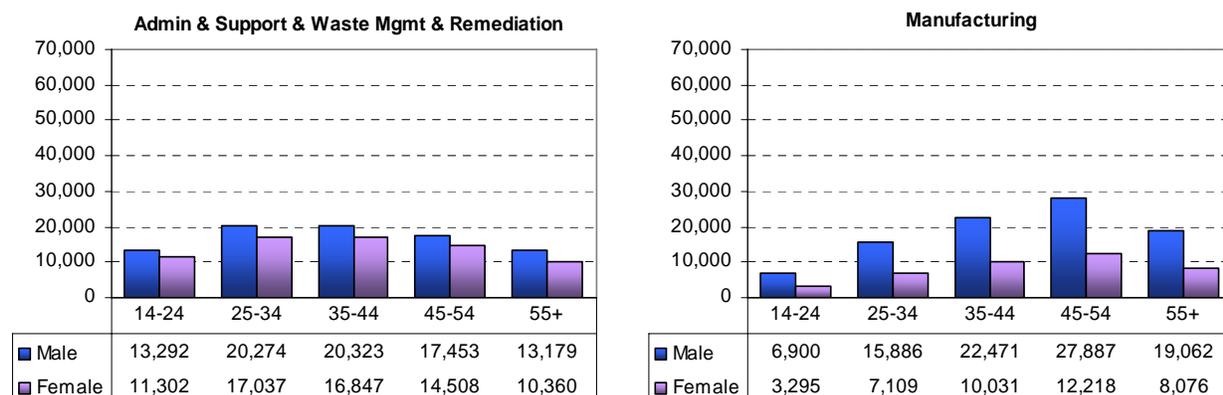
Professional, Scientific, and Technical Services (the third largest employer) includes industries such as computer systems design, engineering and architectural services, scientific research and development, management consulting, accounting, and legal services, among others. This sector has few workers in the youngest age category, likely because the industry's many professional occupations usually require higher education (sometimes advanced or professional degrees) and often experience as well. Men outnumber women, though among the younger age groups the gap narrows—possibly because more women are now entering many of the traditionally male occupations.

Construction (the state's fifth largest employer) is the most gender-skewed of the top sectors, with nearly 82% of its workforce male. Few women work in the many trades or trades helper positions that dominate the industry. Women employed in construction are most likely engaged in the sector's few office professional or support occupations.



Administrative & Support & Waste Management & Remediation Services (the sixth largest sector) comprises a collection of industries that primarily provide a variety of ancillary services to businesses and other establishments. Included among the industries in this business sector are office and facilities support, security services, waste collection and site recovery, among other services. A large proportion of the jobs offer on-the-job training and require only a high school education or less—hence, the relatively high share of young workers. Temporary help agencies, which comprise a sizable part of this sector, may employ all skill and education levels, but they also provide a good starting point for the inexperienced.

Manufacturing (the seventh largest sector) is an aging industry. The sector overall has long been losing jobs, though individual industries have increased employment. This has affected the age structure of the workforce. With fewer entry-level workers being hired, and layoffs most likely to impact younger workers with low seniority, the workforce age is rising. Manufacturing also offers few part-time positions, often sought by the young. Employment tends to drop quickly after age 54—perhaps in part due to retirements. About 7 out of 10 Manufacturing employees are male—a result of their preponderance in production occupations. This is not always the case, however; production workers in the textile and garment are mostly female, but this industry has a relatively small presence in Maryland.



TOP INDUSTRY SECTORS BY WORKFORCE GROUP

Ranking the top employers for each demographic group reveals a sometimes wide variation in importance of each sector. The largest industries overall are usually (but not always) among the top tier employers for all groups. Rankings tend to vary more between men and women than they do between age categories. Not only are large employers ordered quite differently for men and women, but some are among the top ten for one sex and do not make the list for the other. For example, Wholesale Trade and Transportation & Warehousing are major employers for men, but are not in the top ten for women. On the other hand, Other Services and Educational Services are top employers for women, but not listed for men. Industry rankings by age group are much more similar. An exception is the youngest category of workers (14-24 years), which has some differences from the others. Among them: it is the only group in which Arts, Entertainment & Recreation ranks in the top ten but Wholesale Trade does not.

Top 10 Employers for Men	Jobs
Retail Trade	151,796
Construction	147,468
Professional, Scientific & Technical Svcs.	120,827
Manufacturing	92,207
Accommodation & Food Services	91,113
Admin. & Support & Waste Mgmt.& Remed. Svcs.	84,523
Wholesale Trade	66,668
Health Care & Social Assistance	63,180
Transportation & Warehousing	49,188
Finance & Insurance	40,369

Top 10 Employers for Women	Jobs
Health Care & Social Assistance	234,287
Retail Trade	148,860
Accommodation & Food Services	102,208
Professional, Scientific & Technical Svcs.	100,779
Admin. & Support & Waste Mgmt.& Remed. Svcs.	70,056
Finance & Insurance	68,021
Other Services	49,534
Manufacturing	40,733
Educational Services	38,198
Construction	33,116

Maryland's number one industry, Retail Trade, is the first or second largest employer for men and women and for all age groups except 35-44 years (for whom it is third). It is especially significant for younger (14-24 years) workers; one out of every four is employed in Retail. For every age category except the youngest, the sizable Health Care & Social Assistance sector is the top employer. But what is remarkable is the difference in its importance for men and women. It is far and away the number one employer for women, but only ranks eighth for men. About 23% of all women working in the private sector are employed in Health Care & Social Assistance compared with 6% of men. The common wisdom is that Health Care is a major employer (and it is)—but not for all workforce groups.

Construction, another large sector, ranks fourth as an employer for every age group except the oldest, for whom it is fifth. But again, gender differences are notable. The industry is the second largest employer for men but ranks tenth for women. Nearly 14% of male private sector workers are employed in construction but only about 3% of women are.

Top 10 Employers for Workers 14-24 yrs	Jobs
Retail Trade	86,710
Accommodation & Food Services	78,487
Health Care & Social Assistance	33,503
Construction	24,708
Admin. & Support & Waste Mgmt.& Remed. Svcs.	24,594
Professional, Scientific & Technical Svcs.	19,076
Other Services	14,298
Finance & Insurance	11,488
Arts, Entertainment & Recreation	11,394
Manufacturing	10,195

Top 10 Employers for Workers 25-34 yrs	Jobs
Health Care & Social Assistance	62,368
Retail Trade	55,855
Professional, Scientific & Technical Svcs.	53,527
Construction	41,298
Accommodation & Food Services	40,174
Admin. & Support & Waste Mgmt.& Remed. Svcs.	37,311
Finance & Insurance	26,711
Manufacturing	22,995
Wholesale Trade	19,205
Other Services	16,253

Top 10 Employers for Workers 35-44 yrs	Jobs
Health Care & Social Assistance	72,830
Professional, Scientific & Technical Svcs.	58,407
Retail Trade	55,350
Construction	46,359
Admin. & Support & Waste Mgmt.& Remed. Svcs.	37,170
Manufacturing	32,502
Accommodation & Food Services	31,252
Finance & Insurance	28,939
Wholesale Trade	26,239
Other Services	19,958

Top 10 Employers for Workers 45-54 yrs	Jobs
Health Care & Social Assistance	74,494
Retail Trade	55,633
Professional, Scientific & Technical Svcs.	52,983
Construction	41,432
Manufacturing	40,105
Admin. & Support & Waste Mgmt.& Remed. Svcs.	31,961
Wholesale Trade	25,548
Finance & Insurance	25,272
Accommodation & Food Services	24,892
Other Services	20,331

Top 10 Employers for Workers 55+	Jobs
Health Care & Social Assistance	54,267
Retail Trade	47,104
Professional, Scientific & Technical Svcs.	37,609
Manufacturing	27,138
Construction	26,782
Admin. & Support & Waste Mgmt.& Remed. Svcs.	23,539
Other Services	18,582
Accommodation & Food Services	18,510
Wholesale Trade	16,830
Finance & Insurance	15,974

SUMMARY

Maryland's private sector workforce numbered more than 2 million workers for all industry sectors in 2007. Just over half the workforce was male; workers aged 25-54 were the largest group. By industry, however, the presence of each population group varied widely. Examining the demographic components of the workforce reveals some of the complexities of the job market.

Understanding the nature and dynamics of the labor market is essential to businesses and program planners. Payroll employment statistics can help measure past industry performance and forecast trends. Supplementing those statistics with demographic data for the workers who staff the industries adds another dimension to the job numbers. It now becomes apparent that each industry sector has a unique age-gender workforce pattern. An industry may be a major employer for all population groups or for only one gender or certain age groups. For those whose focus is a specific target group or an individual industry this information can be quite enlightening.

The industry distribution of the different demographic groups has implications for their labor force experiences. An economic downturn will slow the consumer-sensitive Retail Trade and affect all worker groups, since it is a major employer for all. But since one-quarter of all younger workers hold jobs in that sector, the impact on that age group would be greatest. Male workers, with their high employment in the cyclical Construction and Manufacturing sectors, would be more vulnerable to job loss during a recession, as compared to females, with their concentration in the seemingly recession-proof Health Care & Social Assistance.

The job market can be analyzed not only in terms of the industries that comprise it, but also through the demographic groups that constitute each sector's workforce. An area's industry mix will play a large part to determining its total workforce characteristics.

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