2013

STATE OF MARYLAND
DLLR
DEPARTMENT OF LABOR, LICENSING AND REGULATION

Maryland's Economic and Labor Market Analysis

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Division of Workforce Development and Adult Learning

Maryland Department of Labor, Licensing and Regulation

CONTENTS

SUMMARY

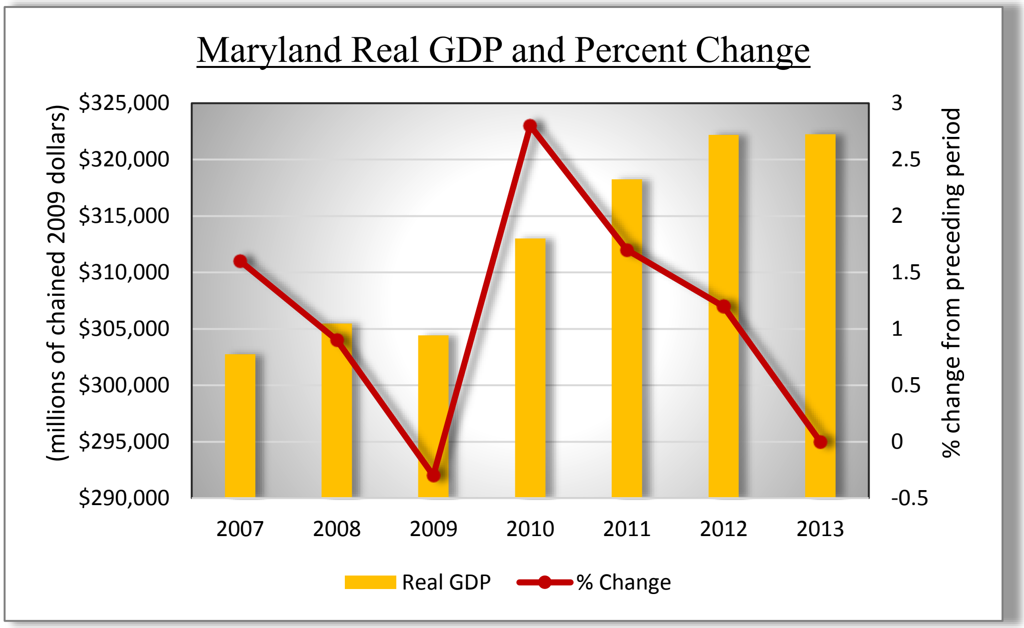
The rate of growth in the United States, as measured by real Gross Domestic Product (GDP), slowed in 2013. This decrease in the rate of growth was also exhibited by the state of Maryland. The government shutdown that occurred in October of 2013 may have made consumers wary and dampened spending levels. However, other economic indicators such as privately owned housing starts and Average Weekly Hours for Manufacturing have had upward movement suggesting that growth is on the horizon.

Maryland is home to a diverse, well educated, and affluent population in comparison to the United States. Although, it goes without saying that there exist some disparities in education and income-level across the state. The unemployment rate is consistently better than that of the U.S. and showing declines, although decreases in labor force participation rate could mean discouraged workers have stopped looking for work. If those discouraged workers re-enter the available labor pool and economic conditions continue to improve, the unemployment rate may not decline at as great of a rate in the near future.

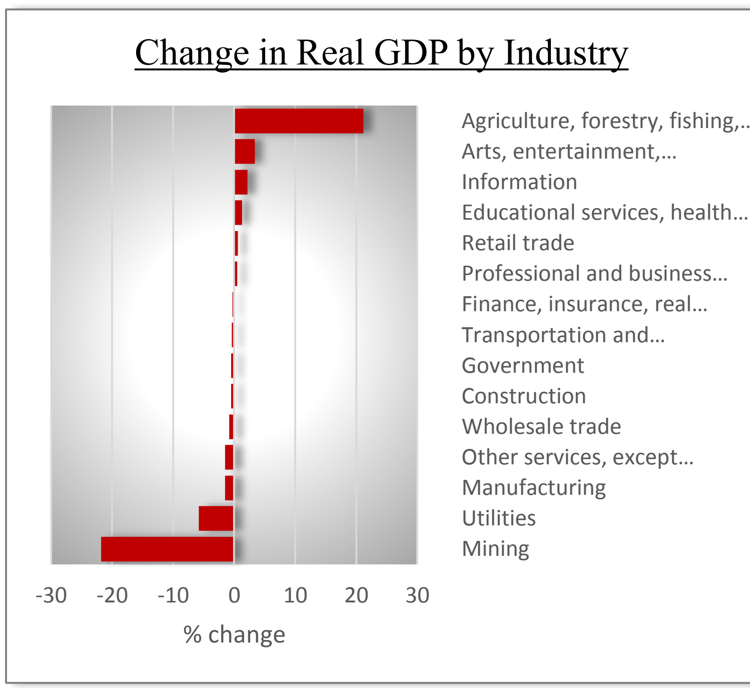
Industry diversity is relatively high in Maryland, with Government, Professional and Technical Services, and Education and Health Services dominating in terms of employment. These industries have recovered since February 2010 lows, have exhibited positive growth exceeding February 2008 levels, and are projected to continue to grow. Even industries showing declines, such as Manufacturing, are experiencing increases in specialized areas such as Chemical Manufacturing. Skilled occupations related to health care and technology fields are highly demanded by employers and are high-paying careers.

ECONOMIC INDICATORS

In 2013, the Unites States' real Gross Domestic Product (GDP) growth slowed to 1.8 percent from a rate of 2.5 percent in the previous year (Bureau of Economic Analysis, 2014). In terms of the U.S. economy, Nondurable–goods manufacturing, Real estate and rental and leasing, and Agriculture, forestry, fishing, and hunting were the leading contributors to real U.S. economic growth (Bureau of Economic Analysis, 2014). In the state of Maryland the rate of growth also slowed from a rate of 1.2 percent in 2012 to 0 percent growth in 2013, but the overall level has risen over time (See Graph 1).



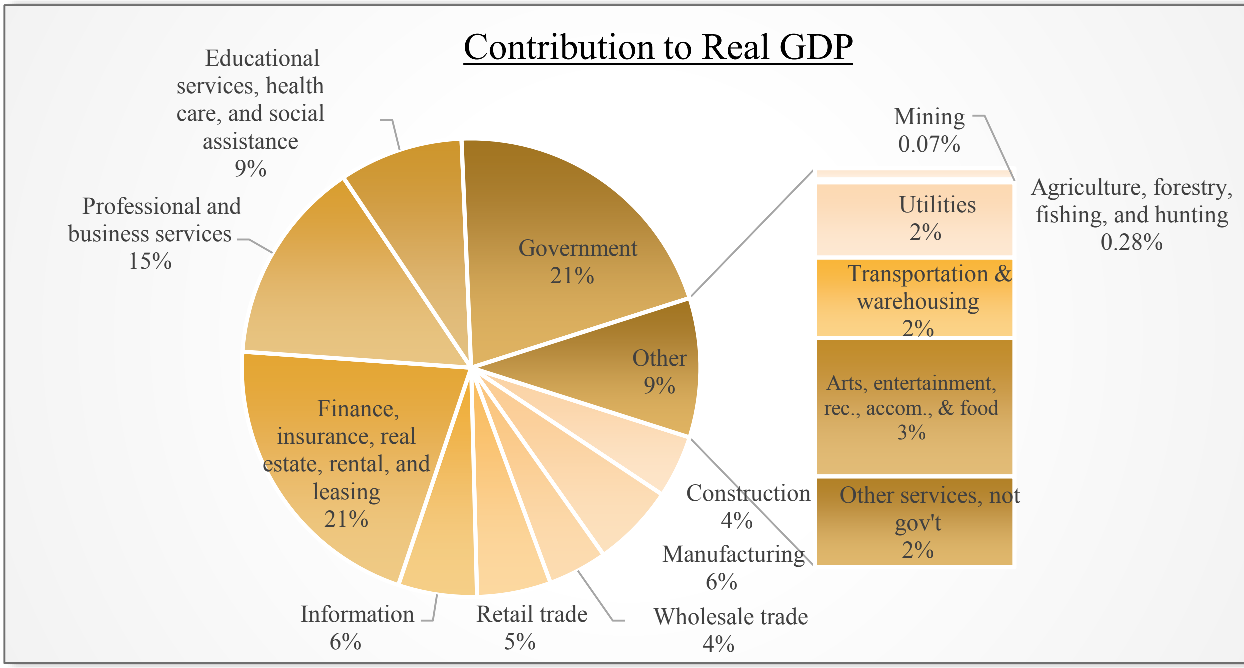
Graph1: Maryland's Real GDP and Real GDP growth by year; Data from: Bureau of Economic Analysis



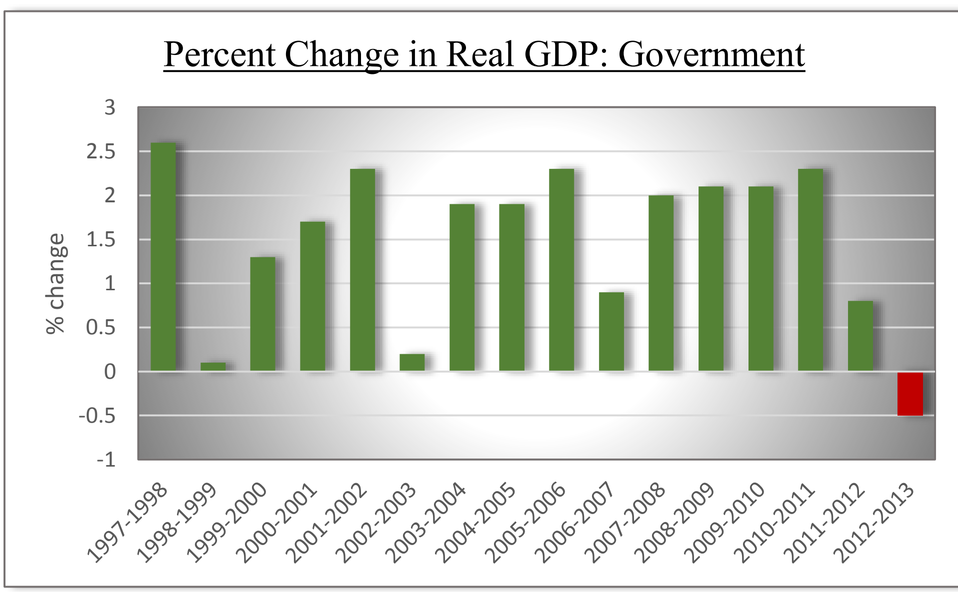
Graph 2: Maryland's change in real GDP by industry; Data from: Bureau of Economic Analysis

The Agriculture, forestry, and fishing industry showed the largest percentage increase and Mining exhibited the largest decrease (See Graph 2); however, these are relatively small components of Maryland's overall economy (See Graph 3). Professional and business services and Educational services, health care, and social assistance, relatively large components of Maryland's economy, experienced growths of 0.5 percent and 1.3 percent respectively with Health care and social assistance being a primary driver in the latter category with an increase of 2.1 percent. In 2013, Government- a primary driver of Maryland's economy- experienced negative growth in terms of real GDP for the first time in the available time series (1997-1998) (See Graph 4). In examining quarterly data it is not uncommon for there to be a decline in real GDP in terms of Government in the 4th quarter;

however, in 2013 real GDP related to Government was estimated to be $66,437 (millions of chained (2009) dollars) , which is a level not seen since 2nd quarter 2011 (Bureau of Economic Analysis, 2014). It is therefore hypothesized that the federal government shutdown, which occurred in October 2013, may have had a negative impact on Maryland's economy.



Graph 3: Components of GDP by industry; Data from: Bureau of Economic Analysis



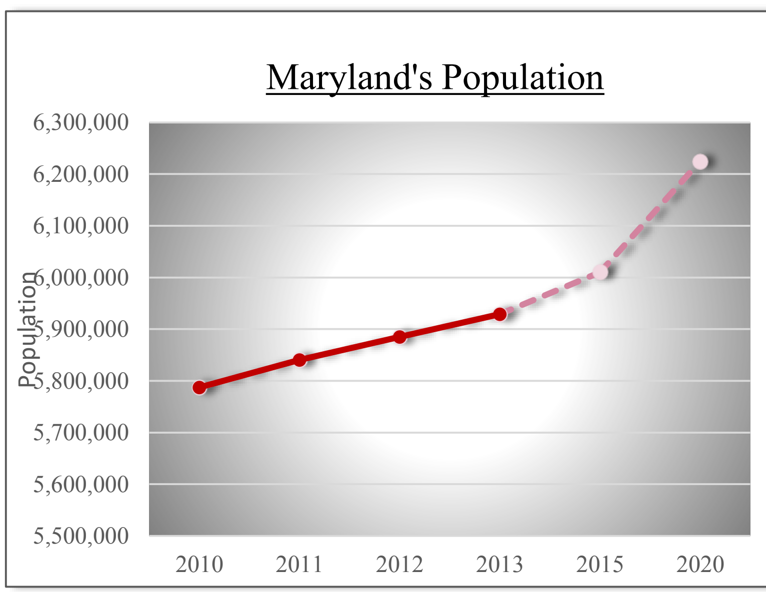
Graph 4: Change in Real GDP; Data from: BEA

Personal consumption expenditures (PCE), a driver of economic growth, tends to be high in Maryland. In 2012, it was reported to have increased by 3.5 percent to approximately $241 billion, which is 15th highest nationally (Bureau of Economic Analysis, 2014). Real per capita personal income has been increasing in Maryland since 2009. In 2013, per capita income in Maryland was $ 54,259 with $47,124 per capita disposable personal income, 6th highest in the nation. In fact, Maryland's median adjusted household income of $71,122 (in 2012 dollars) is the highest in the nation (Census, 2014). In Maryland, consumer spending as measured by total PCE is in the top ten for the U.S., with a large component being housing and utilities; however, that spending as a proportion of per capita disposable income is one of the top ten lowest in the nation. This suggests that consumer spending is high, but incomes are high enough to support current or increased spending which might contribute to future positive gains in economic activity in Maryland.

In terms of other economic indicators, privately owned housing starts in Maryland have exhibited an upward trend since 2011 and hit a post-recession high of 1,188 in April 2013 (Department of Commerce, 2014). Additionally, multiple unit housing starts hit a marked high in September 2013 of 1,501. The valuation of housing permits is also upward trending with a high in September 2013. Average Weekly Hours for Manufacturing in Maryland has also shown increases since 2012 (Department of Labor , 2014).

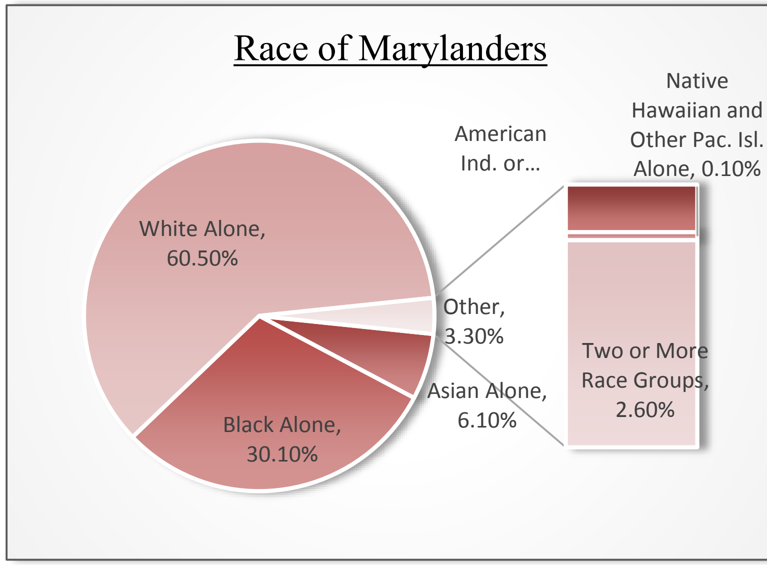
POPULATION AND DEMOGRAPHICS: RESIDENTS, WORKERS, AND THE UNEMPLOYED

In regards to total population the state of Maryland ranks near the middle of the states, but in terms of population density Maryland ranks 6th in the nation (in terms of 2010 population) (Census, 2014). Maryland has exhibited positive growth in population and is projected to continue to increase (Maryland Department of Planning, 2014) (See Graph 5).



Graph 5: Population and projected population; Data from: Census and MDP

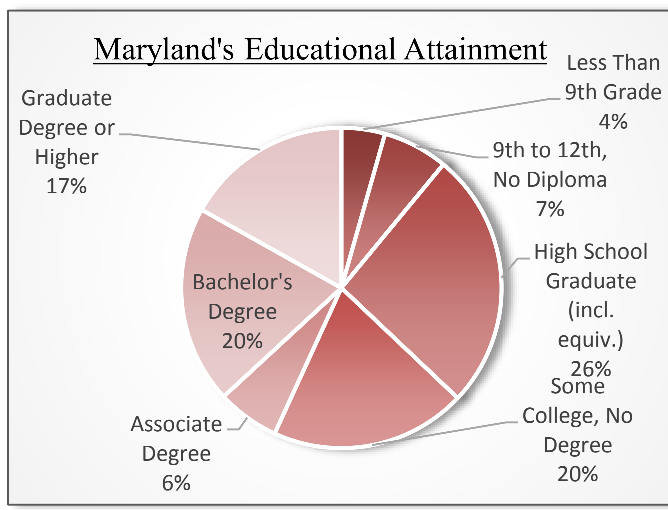
Maryland welcomes a diverse population with the three major races represented being White alone (60.5%), Black alone (30.1%), and Asian alone (6.1%) (Census, 2014) (See Graph 6). In regards to ethnicity, Maryland is 9% Hispanic or Latino. Gender is equally distributed, with females accounting for 51.5% of the population (Census, 2014). Maryland is home to a well educated population, and ranks 3rd in the nation for percent of population with a graduate degree or higher (See Graph 7). In 2013 the median age of Marylanders was 38.2 years, but the distribution of people in older age categories was slightly higher in Maryland than that of the U.S. (See Table 1).



Graph 6: Race of Marylanders; Data from: Census and Statsamerica

	Maryland	U.S.
Preschool (0 to 4)	6.20%	6.30%
School Age (5 to 17)	16.50%	17.00%
College Age (18 to 24)	9.50%	10.00%
Young Adult (25 to 44)	26.80%	26.30%
Older Adult (45 to 64)	27.60%	26.30%

Table 1: Distribution of population by age category; Data from: Census and Statsamerica

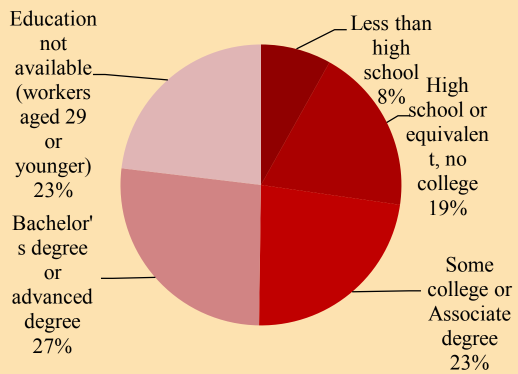


Graph 7: Educational attainment; Data from: Census and Statsamerica

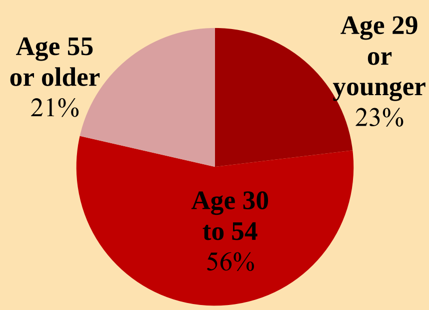
Maryland's employment and unemployment is not equally distributed among demographic groups, or geographic areas as is later shown, and poses unique opportunities and challenges for the state. Maryland's youth, certain minority groups, and those with fewer credentials face higher unemployment rates and represent a smaller portion of those employed in Maryland (See Box 1 and 2).

Who’s Working in Maryland*

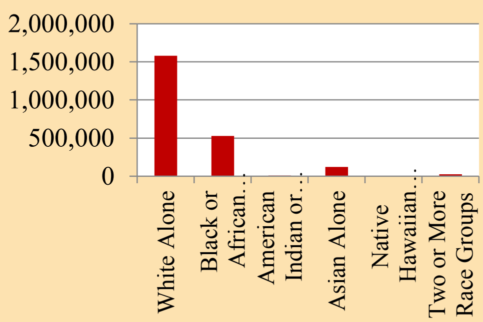
Workers by Education



Workers by Age Category



Workers by Race

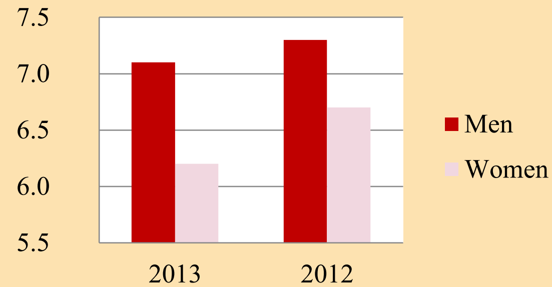


*Above data based on the most recent available data (2011) from the U.S. Census Bureau; onthemap.census.gov

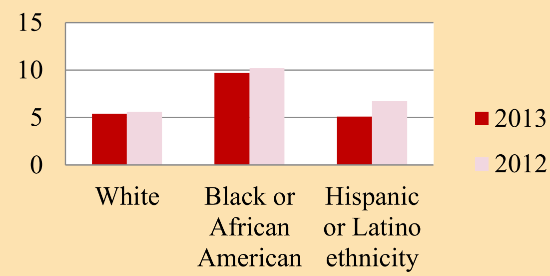
Box 1: Data on workers employed in Maryland

Unemployment by Demographic Group in Maryland**

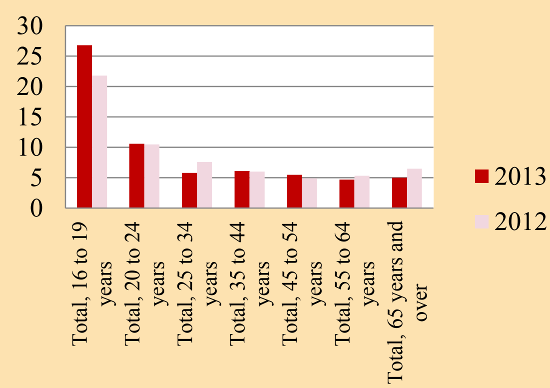
Unemployment Rate by Gender



Unemployment Rate by Race /Ethnicity



Unemployment Rate by Age

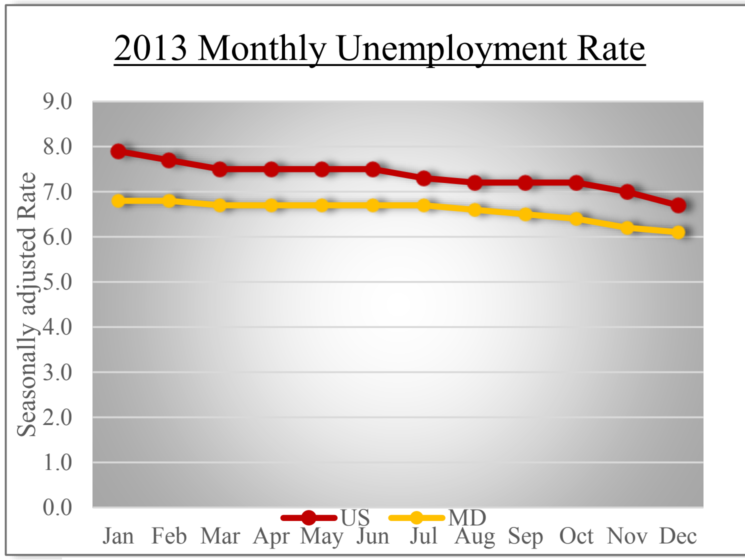


*Data from http://www.bls.gov/gps/

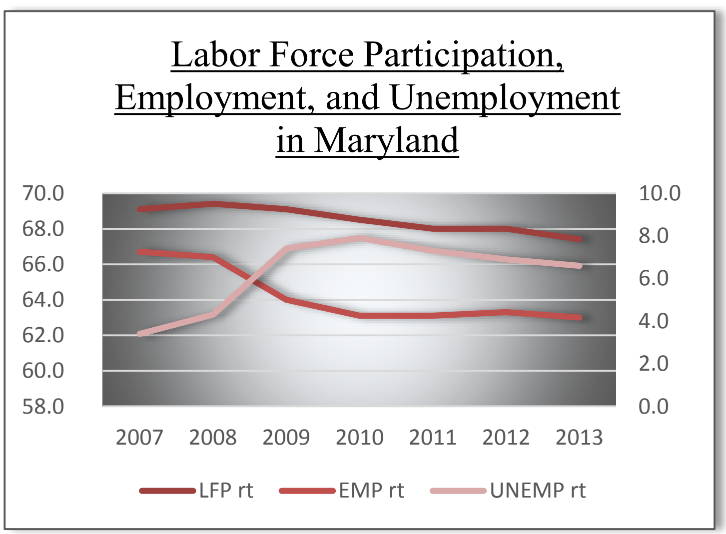
Box 2: Data on unemployment rates across demographic groups in Maryland over time

EMPLOYMENT, UNEMPLOYMENT, AND LABOR FORCE

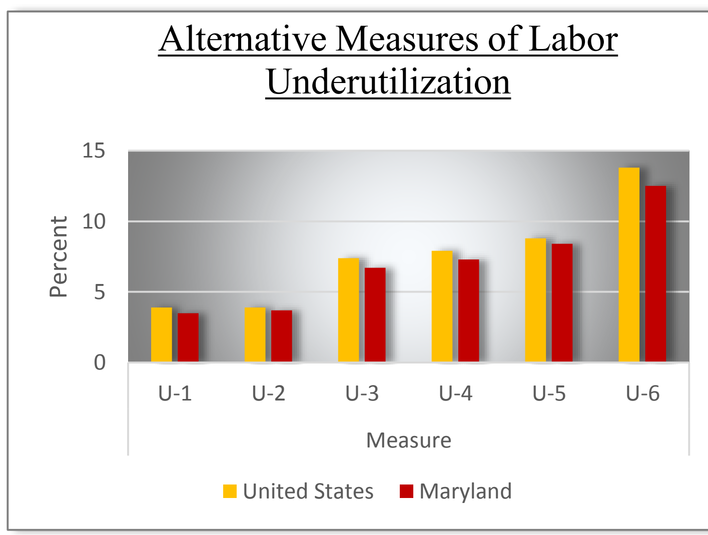
Maryland has been fortunate to maintain an unemployment rate that is consistently lower than that of the United States (See Graph 8). The annual unemployment rate (not seasonally adjusted) in Maryland has exhibited a downward trend since 2010 and from 2012 (annual average) to 2013 (annual average) decreased by more than 4 percent (BLS, 2014). Maryland's labor force averaged 3,127,676 persons in 2013, up from 3,125,586 in 2012. From 2012 to 2013, the number of employed persons rose by 0.4% which is a significantly smaller amount than prior years. It is important to note that while unemployment rates are falling, labor force participation rates are also falling in Maryland (BLS, 2014) (See Graph 9). This decrease in the labor force participation rate could be in part due to discouraged workers who have removed themselves from the available labor pool, and who may re-enter should right economic conditions occur. In examining alternative measures for labor utilization, it is shown that when including discouraged workers, marginally attached workers, and persons employed part time for economic reasons (U-4, U-5, and U-6 measures respectively) the rates are higher, but still below that of the United States (BLS, 2014) (See Graph 10).



Graph 8: US vs. MD unemployment rate; Data from: BLS



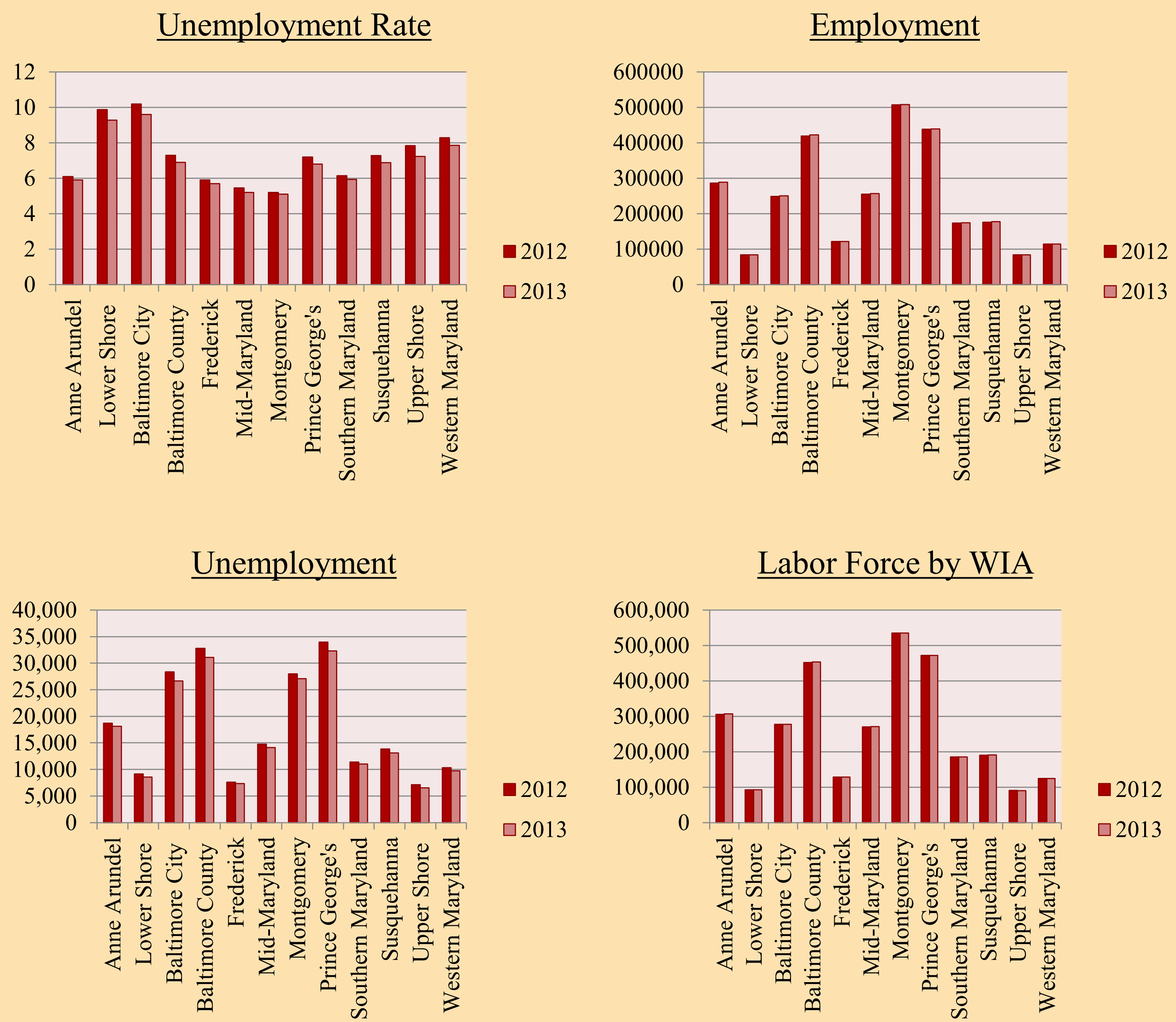
Graph 9: Labor force, employment, and unemployment; Data from: BLS



Graph 10: Alternative measures of labor underutilization; Data from: BLS

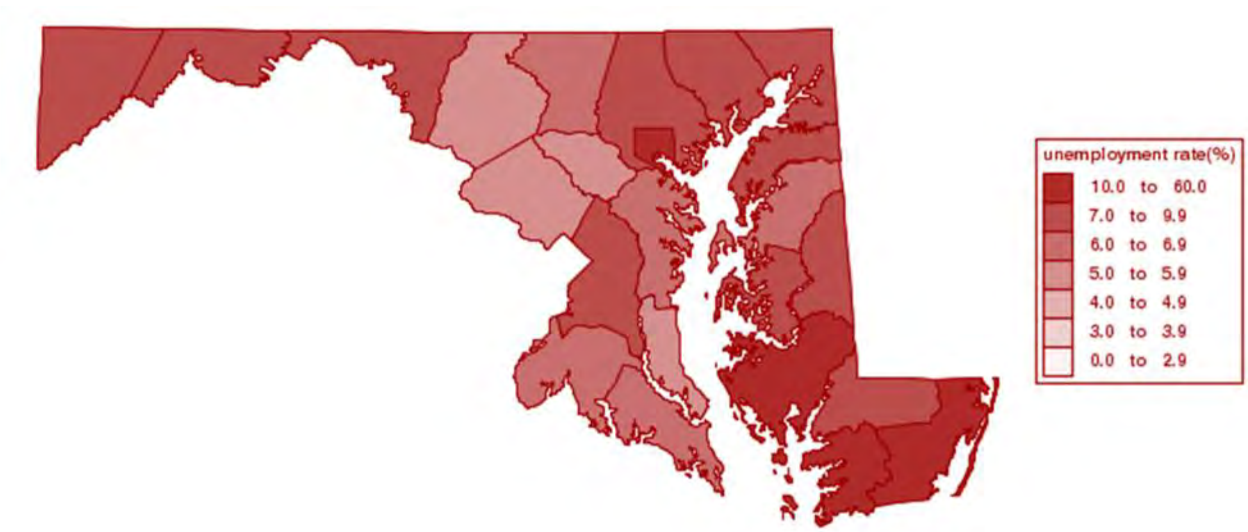
As was previously alluded to employment and unemployment is not equally distributed across the state, which creates an additional complexity in forming policies aimed at curbing unemployment in Maryland. Baltimore City, a large urban area, has consistently exhibited high unemployment rates. Additionally, the Lower Shore area of Maryland, which has an emphasis on Leisure and Hospitality, experiences seasonal fluctuations in the unemployment rate resulting in an overall high rate. On a positive note, the unemployment rate fell in all areas from 2012 to 2013 (See Box 3).

Regional Trends



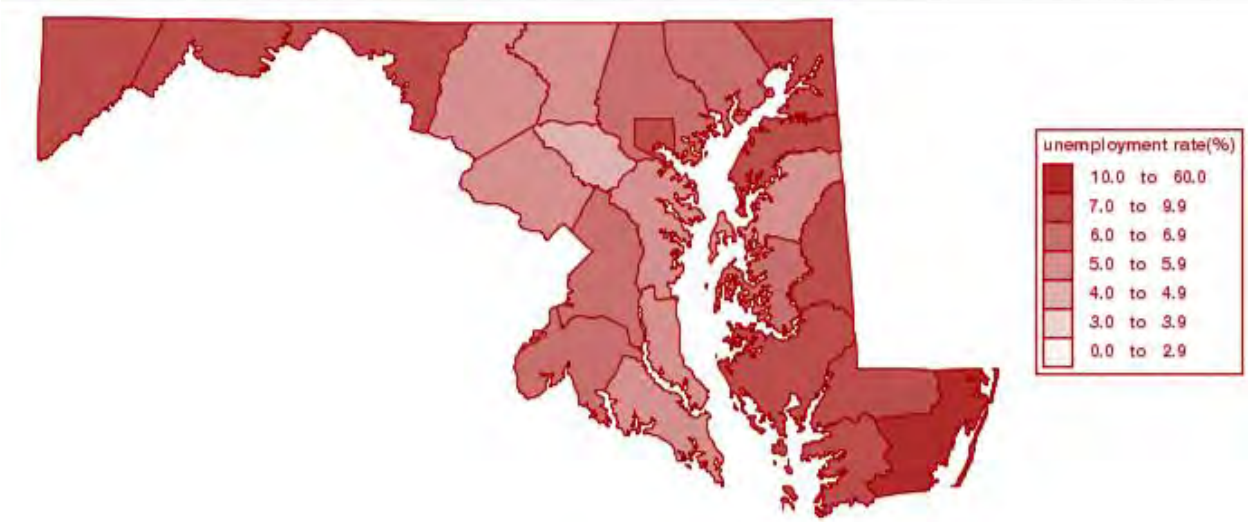
Box 3: Regional trends in employment, unemployment, and labor force by WIA; Data from DLLR's LAUS program

2012 UNEMPLOYMENT RATE BY COUNTY



Graph 9: Unemployment rate (not seasonally adjusted) by county; Source: http://data.bls.gov/map/MapToolServlet

2013 UNEMPLOYMENT RATE BY COUNTY

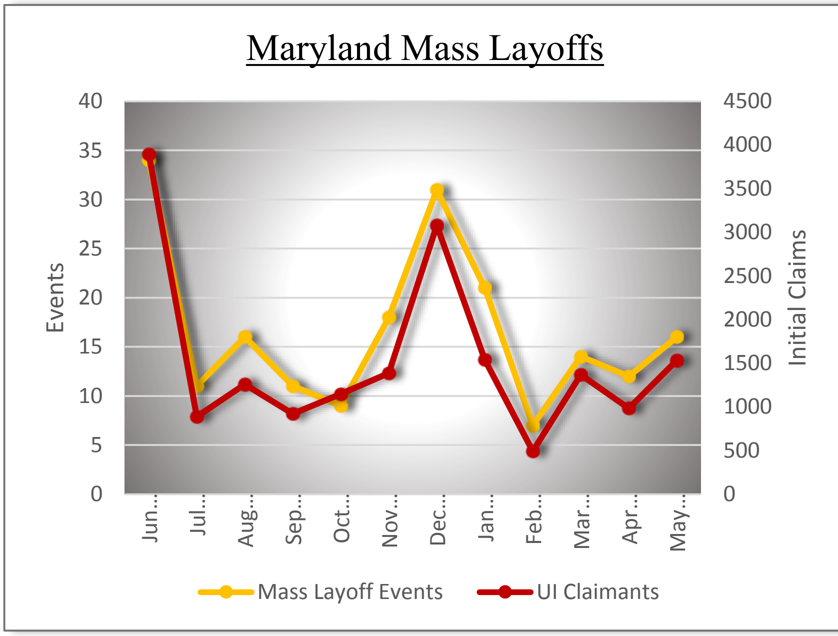


Graph 10: Unemployment rate (not seasonally adjusted) by county; Source: http://data.bls.gov/map/MapToolServlet

UNEMPLOYMENT INSURANCE CLAIMS AND LAYOFF ACTIVITIES

Total initial claims decreased from 2012 to 2013 by more than six percent and continued claims fell from an average of 59,090 in 2012 to 56,249 in 2013 (DOL, 2014) (Federal Reserve Bank of St. Louis , 2014). Weeks compensated and benefits paid by the Maryland Unemployment Insurance decreased by a greater rate than that observed in 2012, which were all positive developments (DOL, 2014).

Although the Mass Layoff Statistics program has been discontinued, in analyzing the available data it appears that mass layoffs (defined as a layoff event which produces 50 or more initial claims for unemployment insurance from a single employer, filed within a five week period) has decreased from a high in December 2012 (BLS, 2014) (See Graph 11).

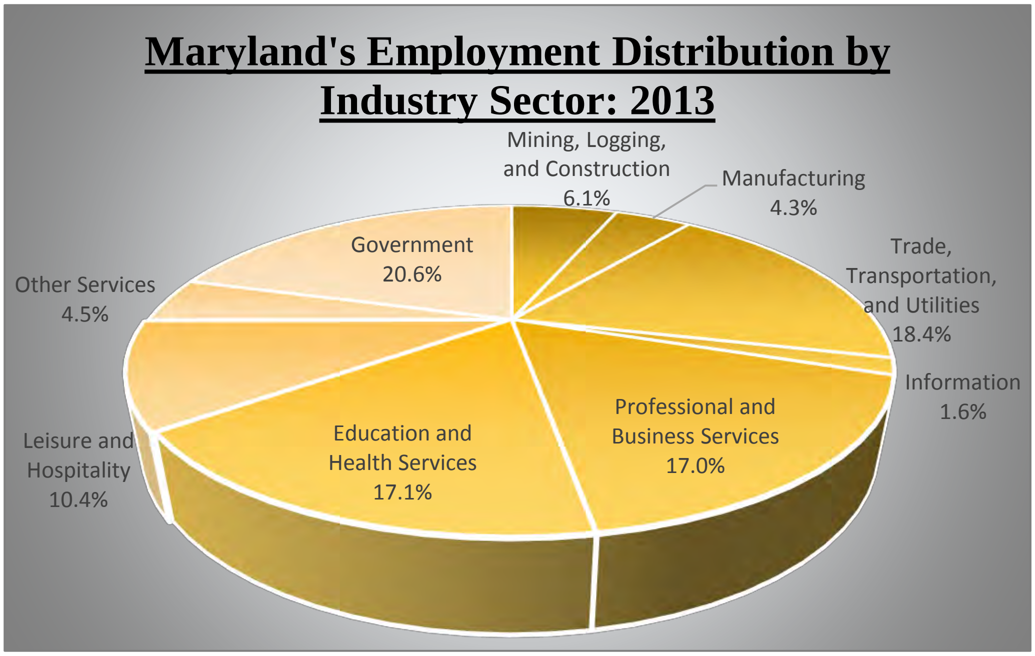


Graph 11: Mass Layoff Statistics; Data from: BLS

The Worker Adjustment and Retraining Notification (WARN) log for 2013 listed 46 notifications, occurring in various industries, which may have been responsible for some of the mass layoffs documented by BLS. The highest number of notifications occurred in Health Care and Social Assistance sector, but this was primarily driven by one employer with multiple locations. Professional, Scientific and Technical Services also accounted for a high number of notifications, and the largest listed downsizing, of 333 employees, occurred in the Information sector (DLLR, 2013).

TOTAL NONFARM EMPLOYMENT AND RECOVERY

Maryland's economy is diverse in industry composition, providing a variety of opportunities at all skill and education levels. It is strongly services-oriented, with the services sector accounting for about nine out of ten payroll jobs. Approximately 20% of the employment is in the public sector (See Graph 12). Maryland, equipped with high industry diversity and an emphasis on providing services, is generally positioned to be better insulated against economic shocks than states with an emphasis on cyclically-sensitive goods-producing industries of Construction, Manufacturing, and Natural Resources and Mining.



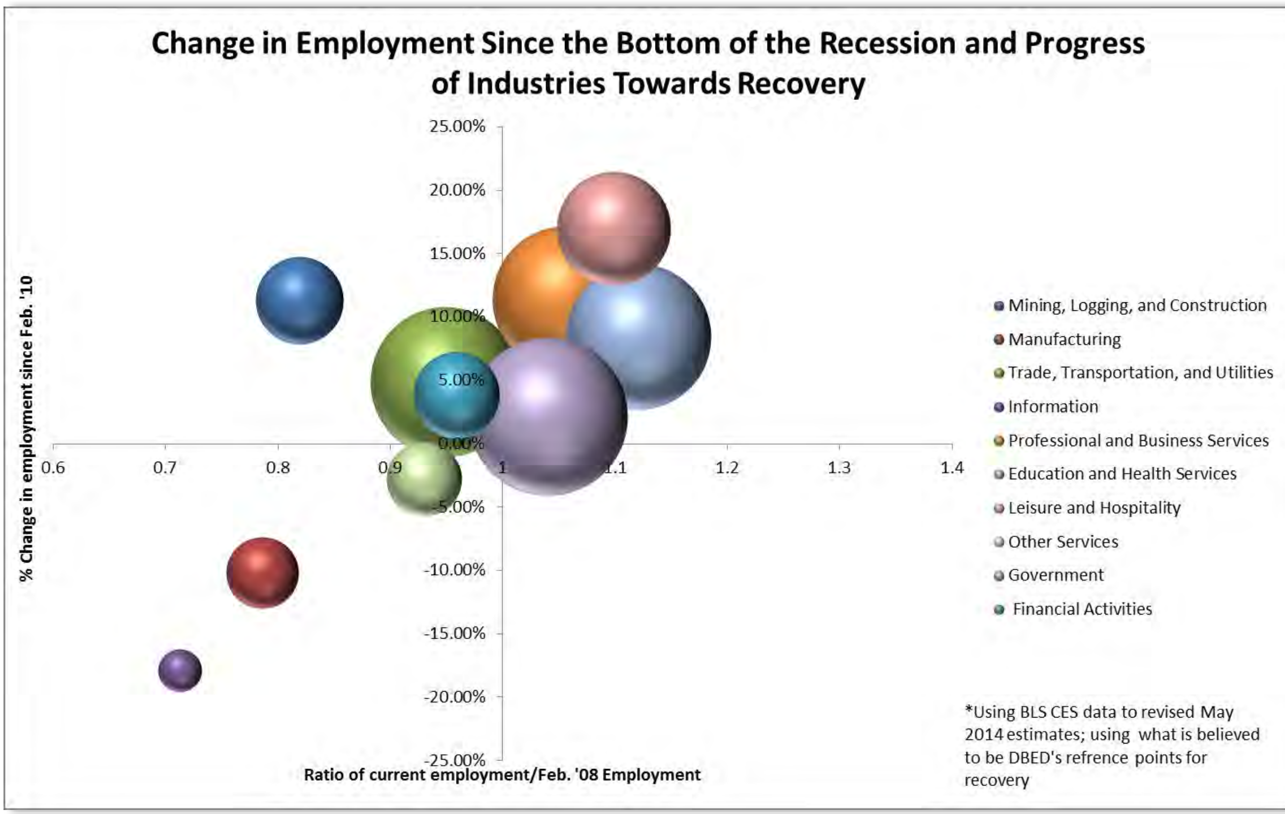
Graph 12: Industry employment; Data from: BLS

Maryland's 2013 annual total non-farm employment averaged 2,596,100, as measured by the Current Employment Statistics (CES) program, increased from 2012-2013 by 0.8 percent- a smaller growth than it exhibited the year before – and was primarily driven by growth in the private sector. From 2012 to 2013, Manufacturing experienced the sharpest decline of -2.7 although less severe than the loss exhibited in the previous year. Over the same time frame, Mining, logging, and construction showed an impressive increase of 2.6 percent and Leisure and Hospitality lead the charge with an increase of 3.8 percent (BLS, 2014).

In evaluating progress towards recovery since employment lows occurred in February 2010[1], The top five industries, by employment levels, of: Education and Health Services , Leisure and Hospitality, Professional and Business Services, Government, and Trade, Transportation, and Utilities are all experiencing gains in employment since February 2010 with all but Trade, Transportation, and Utilities exceeding February 2008 employment levels. However when examining the bottom five industries, three show losses in employment since 2010 (Information, Other Services, and Manufacturing) and none exceed the February 2008 employment levels. Since February 2010, 7 out of 10 of the industries in Maryland have exhibited positive growth

[1] Note: This analysis uses up to May 2014 as the time frame

with Leisure and Hospitality experiencing the largest gain in terms of percentage increase (17%) and Information having the largest losses in percentage terms (-17.9%). The recession did not affect all of the sectors equally with some, such as Government and Education and Health Services (those closest to the vertex in Graph 13), relatively unscathed and others more negatively impacted. Some areas, such as Mining, Logging, and Construction, have shown tremendous growth since February 2010, but have yet to achieve February 2008 employment levels. Unfortunately, Manufacturing and Information continue to show negative growth and have failed to achieve employment levels that approach February 2008 levels. In the bubble chart below, the size of the bubble denotes the level of employment with Government, Education and Health Services, Trade, Transportation, and Utilities, and Professional and Business Services shown as the largest employers. It is promising that these industries, which represent a large portion of employment, have shown positive growth since February 2010 (See Graph 13).



Graph 13: Growth and recovery in terms of employment; Data from: BLS

DIVING DEEPER INTO EMPLOYMENT TRENDS

To further examine the more specific areas and industries providing employment opportunity in Maryland, data from Maryland's Quarterly Census of Employment Wages (QCEW) Program can be examined. The data provides for analysis at a greater spatial resolution and industry specificity than other available datasets; however, it is important to note that the data only covers workers covered by the Unemployment Insurance (UI) Law of Maryland and the Unemployment Compensation for Federal Employees (UCFE) program.

In analyzing percentage change in employment from 2010 to 2013 for more specific industries in Maryland, it is clear that some industries, such Manufacturing, which is experiencing declines as a whole, do have components, such as Chemical Manufacturing, that are experiencing growth (See Appendix A). However with consumers' preferences leaning towards digital media, Paper Manufacturing is being hit hard in Maryland and has declined by approximately 23 percent. On the other hand, Maryland's Amusement, Gambling, and Recreation industry has shown an almost 40 percent increase in employment, which makes sense given the passage of Question 7 late in 2012 that allowed for the expansion of gambling in Maryland, including table games (ABC News, 2012). Additionally, Performing Arts, Spectator Sports, and Related Industries has shown great growth in employment of over 33 percent, which could in part be due to the Baltimore Raven's 2012 Super Bowl run and the Baltimore Orioles 2012 winning season and advancement to the Division Series. Contribution to private sector employment growth varied across the state. Health care related industries experienced high levels of growth across the state. Subsectors of the Education and Health services sector, such as Hospitals and Ambulatory health care services, are in the top ten of private sector growth industries for 11 of the 12 WIAs. Anne Arundel County, home to Maryland Live Casino, experienced growth in Amusement, recreation, and gambling. Subsectors relating to food and beverages, either in regards to retail or accommodation and food services, also experienced growth in employment or were in the top ten private sector growth areas by region for 11 of the 12 WIAs (DLLR, 2014). The following charts detail the employment by sector and display more detail regarding top sectors showing growth in employment for each WIA.

Anne Arundel

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	251,966
Government Total	47,270
Federal	13,175
State	13,327
Local	20,768
Private Sector Total	204,696
Natural Resources & Mining	182
Construction	14,932
Manufacturing	12,235
Trade, Transportation, & Utilities	52,856
Information	2,564
Financial Activities	10,175
Professional & Business Services	40,810
Education & Health Services	29,256
Leisure & Hospitality	32,508
Other Services/Unclassified	9,178

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Professional and technical services	2,038
Amusements, gambling, and recreation	1,436
Food services and drinking places	1,132
Ambulatory health care services	618
Specialty trade contractors	570
Social assistance	509
Utilities	406
Food and beverage stores	291
Real estate	271
Educational services	240

Baltimore City

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	330,746
Government Total	69,110
Federal	9,677
State	34,431
Local	25,002
Private Sector Total	261,636
Natural Resources & Mining	9
Construction	9,431
Manufacturing	12,038
Trade, Transportation, & Utilities	38,647
Information	3,665
Financial Activities	16,362
Professional & Business Services	42,748
Education & Health Services	100,533
Leisure & Hospitality	27,057
Other Services/Unclassified	11,146

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Administrative and support services	2,967
Hospitals	1,721
Ambulatory health care services	893
Food services and drinking places	727
Professional and technical services	610
Electronic markets and agents and brokers	390
Support activities for transportation	255
Securities, commodity contracts, investments	220
Personal and laundry services	206
Management of companies and enterprises	154

Baltimore County

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	361,042
Government Total	57,364
Federal	15,857
State	11,882
Local	29,625
Private Sector Total	303,678
Natural Resources & Mining	430
Construction	22,181
Manufacturing	16,272
Trade, Transportation, & Utilities	65,834
Information	5,247
Financial Activities	29,531
Professional & Business Services	54,283
Education & Health Services	66,436
Leisure & Hospitality	32,231
Other Services/Unclassified	11,233

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Administrative and support services	770
Nursing and residential care facilities	539
Insurance carriers and related activities	521
Amusements, gambling, and recreation	300
Broadcasting, except Internet	281
Management of companies and enterprises	268
Specialty trade contractors	245
Food manufacturing	234
Securities, commodity contracts, investments	180
Food services and drinking places	175

Frederick

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	94,696
Government Total	15,640
Federal	3,796
State	778
Local	11,066
Private Sector Total	79,056
Natural Resources & Mining	617
Construction	8,295
Manufacturing	4,823
Trade, Transportation, & Utilities	16,062
Information	1,140
Financial Activities	6,565
Professional & Business Services	14,931
Education & Health Services	12,594
Leisure & Hospitality	10,897
Other Services/Unclassified	3,132

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Food services and drinking places	533
Amusements, gambling, and recreation	422
Ambulatory health care services	334
Food and beverage stores	277
Construction of buildings	230
Specialty trade contractors	226
Credit intermediation and related activities	160
Management of companies and enterprises	128
Clothing and clothing accessories stores	83
Electronic markets and agents and brokers	81

Lower Shore

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	74,631
Government Total	14,300
Federal	529
State	4,924
Local	8,847
Private Sector Total	60,331
Natural Resources & Mining	584
Construction	3,137
Manufacturing	4,618
Trade, Transportation, & Utilities	14,558
Information	735
Financial Activities	2,911
Professional & Business Services	5,825
Education & Health Services	11,842
Leisure & Hospitality	13,802
Other Services/Unclassified	2,319

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Nursing and residential care facilities	133
Ambulatory health care services	127
Management of companies and enterprises	114
Food and beverage stores	107
Food services and drinking places	96
Specialty trade contractors	88
Health and personal care stores	48
Chemical manufacturing	34
Insurance carriers and related activities	34
Educational services	30

Mid-Maryland

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	215,578
Government Total	24,906
Federal	873
State	2,820
Local	21,213
Private Sector Total	190,672
Natural Resources & Mining	696
Construction	15,394
Manufacturing	11,514
Trade, Transportation, & Utilities	45,134
Information	4,260
Financial Activities	10,547
Professional & Business Services	49,101
Education & Health Services	25,911
Leisure & Hospitality	21,368
Other Services/Unclassified	6,747

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Administrative and support services	1,119
Ambulatory health care services	906
Food services and drinking places	530
Amusements, gambling, and recreation	453
Specialty trade contractors	369
Food manufacturing	288
Electronic markets and agents and brokers	288
Food and beverage stores	257
Credit intermediation and related activities	194
Health and personal care stores	187

Montgomery

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	451,809
Government Total	88,683
Federal	46,854
State	1,122
Local	40,707
Private Sector Total	363,126
Natural Resources & Mining	258
Construction	23,363
Manufacturing	11,219
Trade, Transportation, & Utilities	57,607
Information	12,359
Financial Activities	30,479
Professional & Business Services	98,510
Education & Health Services	66,767
Leisure & Hospitality	40,257
Other Services/Unclassified	22,307

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Food services and drinking places	754
Ambulatory health care services	605
Securities, commodity contracts, investments	290
Hospitals	268
Food and beverage stores	195
Building material and garden supply stores	168
Administrative and support services	160
Educational services	149
Performing arts and spectator sports	138
Rental and leasing services	130

Prince George's

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	299,829
Government Total	86,722
Federal	26,672
State	19,982
Local	40,068
Private Sector Total	213,107
Natural Resources & Mining	203
Construction	24,738
Manufacturing	6,716
Trade, Transportation, & Utilities	57,109
Information	4,689
Financial Activities	11,702
Professional & Business Services	38,061
Education & Health Services	30,690
Leisure & Hospitality	29,520
Other Services/Unclassified	9,679

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Food services and drinking places	1,056
Transit and ground passenger transportation	357
Insurance carriers and related activities	255
Construction of buildings	249
Ambulatory health care services	228
Waste management and remediation services	185
Performing arts and spectator sports	161
Motor vehicle and parts dealers	131
Management of companies and enterprises	98
Educational services	85

Southern Maryland

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	104,912
Government Total	27,528
Federal	11,335
State	1,789
Local	14,404
Private Sector Total	77,384
Natural Resources & Mining	147
Construction	6,933
Manufacturing	1,672
Trade, Transportation, & Utilities	21,988
Information	699
Financial Activities	2,527
Professional & Business Services	15,364
Education & Health Services	12,896
Leisure & Hospitality	12,041
Other Services/Unclassified	3,117

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Heavy and civil engineering construction	441
Food services and drinking places	348
Specialty trade contractors	240
Management of companies and enterprises	142
Hospitals	102
Motor vehicle and parts dealers	99
Professional and technical services	96
Food and beverage stores	86
Personal and laundry services	63
Merchant wholesalers, durable goods	35

Susquehanna

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	118,135
Government Total	27,885
Federal	13,764
State	1,135
Local	12,986
Private Sector Total	90,250
Natural Resources & Mining	1,109
Construction	6,345
Manufacturing	8,681
Trade, Transportation, & Utilities	26,404
Information	426
Financial Activities	3,624
Professional & Business Services	12,265
Education & Health Services	14,812
Leisure & Hospitality	13,054
Other Services/Unclassified	3,530

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Warehousing and storage	1,306
Professional and technical services	706
Amusements, gambling, and recreation	279
Educational services	161
Hospitals	152
Nursing and residential care facilities	123
Merchant wholesalers, durable goods	119
Food services and drinking places	118
Truck transportation	116
Specialty trade contractors	104

Upper Shore

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	60,103
Government Total	9,351
Federal	625
State	1,665
Local	7,061
Private Sector Total	50,752
Natural Resources & Mining	1,439
Construction	3,260
Manufacturing	5,934
Trade, Transportation, & Utilities	12,591
Information	468
Financial Activities	2,074
Professional & Business Services	4,964
Education & Health Services	9,677
Leisure & Hospitality	8,234
Other Services/Unclassified	2,111

PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Amusements, gambling, and recreation	252
Ambulatory health care services	163
General merchandise stores	146
Warehousing and storage	102
Specialty trade contractors	100
Educational services	95
Heavy and civil engineering construction	88
Electronic markets and agents and brokers	88
Telecommunications	67
Management of companies and enterprises	64

Western Maryland

EMPLOYMENT BY SECTOR - 2013 ANNUAL*

Sector	Employment
Total Employment	107,671
Government Total	17,505
Federal	1,234
State	5,980
Local	10,291
Private Sector Total	90,166
Natural Resources & Mining	633
Construction	4,596
Manufacturing	9,789
Trade, Transportation, & Utilities	24,268
Information	1,494
Financial Activities	8,428
Professional & Business Services	8,185
Education & Health Services	18,139
Leisure & Hospitality	11,887
Other Services/Unclassified	2,747

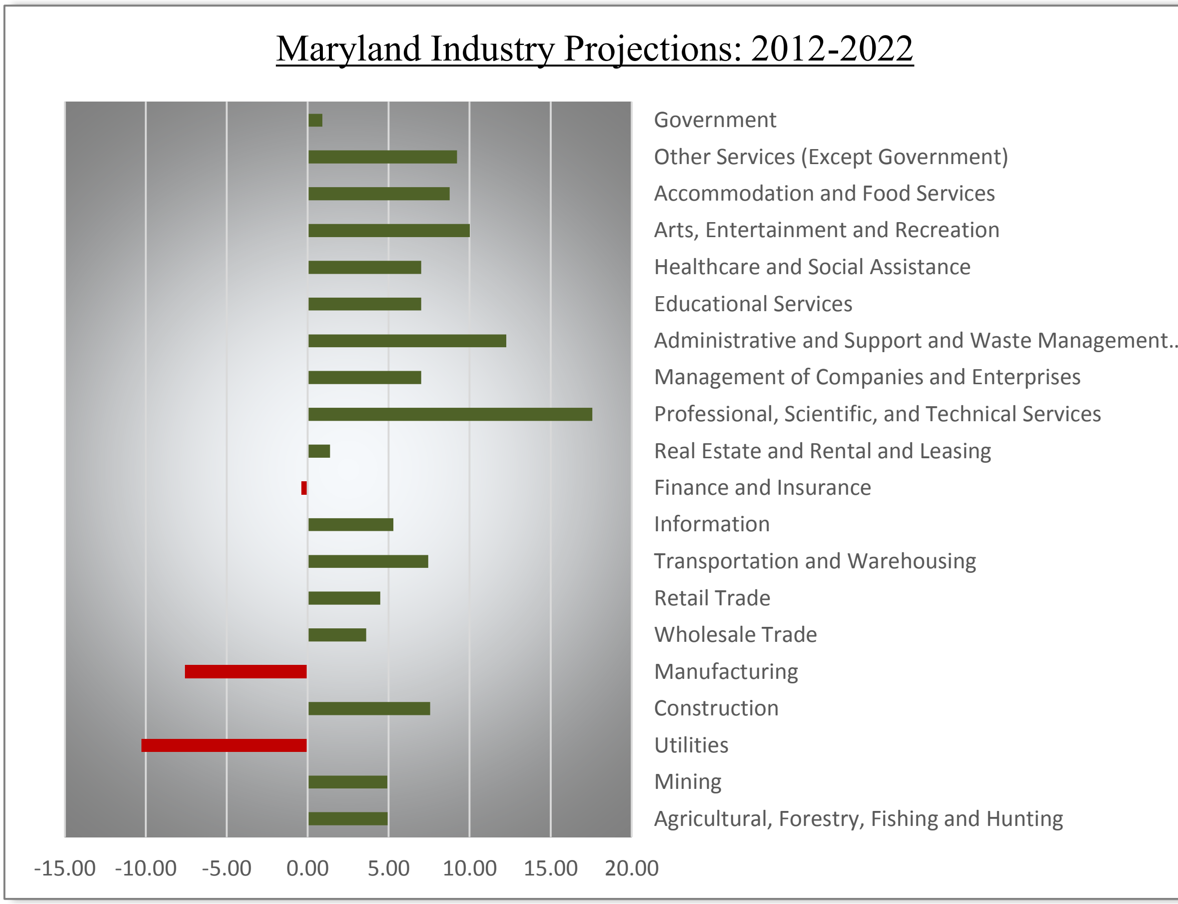
PRIVATE SECTOR GROWTH - Jan. 2012-Dec. 2013*

Industry	Growth
Food services and drinking places	254
Management of companies and enterprises	251
Furniture and related product manufacturing	224
Accommodation	171
Administrative and support services	156
Transportation equipment manufacturing	113
Amusements, gambling, and recreation	107
Social assistance	100
Couriers and messengers	87
Merchant wholesalers, durable goods	85

* Data from DLLR QCEW Program

INDUSTRY PROJECTIONS AND OCCUPATIONAL OUTLOOK

Given the historical growth and prevalence in terms of employment of Maryland's sectors, it is also important to look at projected changes in employment by industry and by occupation. From 2012 to 2022 it is projected that total employment in Maryland will increase by 6.12 percent. All of the sectors are expected to exhibit growth, with the exception of Manufacturing, Utilities, and Real Estate, Rental, and Leasing (See Graph 14). The largest growth is projected to occur in Professional, Scientific, and Technical Services, which is project to grow in employment by 42,555.



Graph 14: Industry Projections; Data from: DLLR

Occupations projected to increase in size and have above average wages in Maryland were stratified by education levels to create list of "Hot Jobs". In the Associate's degree or below category, the top occupations were projected to increase by 13 to 29 percent from 2010 to 2020 and have average annual wages ranging from the high $50,000. These occupations typically required extensive experience or specialized skills. For the Bachelor's degree category, projected growth ranged from 17 percent to 36 percent and have average annual wages ranging from the mid-$66,000 mark upward. These occupations were dominated by computer-related occupations, such as Software Developers. For Graduate and Professional Degrees, health care related occupations dominated having high projected growth (17%+) and even higher annual average wages with nearly all of the top four occupations in that category having an average of $100,000 or more (DLLR, 2014).

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Appendix A

Supersector	Sector	Subsector	Change
Natural Resources and Mining	Agriculture, Forestry, Fishing and Hunting	Animal Production and Aquaculture	↓
		Crop Production	↑
		Fishing, Hunting and Trapping	↓
		Forestry and Logging	↓
		Support Activities for Agriculture and Forestry	↑
	Mining, Quarrying, and Oil and Gas Extraction	Mining (except Oil and Gas)	↓
		Oil and Gas Extraction	↑
		Support Activities for Mining	↑
	Construction	Construction of Buildings	↑
		Heavy and Civil Engineering Construction	↑
		Specialty Trade Contractors	↑
Manufacturing	Manufacturing	Apparel Manufacturing	↑
		Beverage and Tobacco Product Manufacturing	↓
		Chemical Manufacturing	↑
		Computer and Electronic Product Manufacturing	↓
		Electrical Equipment, Appliance, and Component Manufacturing	↓
		Fabricated Metal Product Manufacturing	↓
		Food Manufacturing	↓
		Furniture and Related Product Manufacturing	↑
		Leather and Allied Product Manufacturing	↑
		Machinery Manufacturing	↑
		Miscellaneous Manufacturing	↓
		Nonmetallic Mineral Product Manufacturing	↑
		Paper Manufacturing	↓
		Petroleum and Coal Products Manufacturing	↑
		Plastics and Rubber Products Manufacturing	↓
		Primary Metal Manufacturing	↓
		Printing and Related Support Activities	↓
		Textile Mills	↓
		Textile Product Mills	↓
		Transportation Equipment Manufacturing	↓
		Wood Product Manufacturing	↑
Education and Health Services	Educational Services	Educational Services	↑
	Health Care and Social Assistance	Ambulatory Health Care Services	↑
		Hospitals	↑
		Nursing and Residential Care Facilities	↑
		Social Assistance	↑
Information	Information	Broadcasting (except Internet)	↑
		Data Processing, Hosting, and Related Services	↓
		Motion Picture and Sound Recording Industries	↓
		Other Information Services	↑
		Publishing Industries (except Internet)	↑
		Telecommunications	↓

*Data from; DLLR QCEW Program; 2010 - 2013

Professional and Business Services	Management of Companies and Enterprises	Management of Companies and Enterprises	↑
	Administrative and Support and Waste Management and Remediation Services	Administrative and Support Services	↑
		Waste Management and Remediation Services	↑
	Professional, Scientific, and Technical Services	Professional, Scientific, and Technical Services	↑
Financial Activities	Finance and Insurance	Credit Intermediation and Related Activities	↓
		Funds, Trusts, and Other Financial Vehicles	↓
		Insurance Carriers and Related Activities	↑
		Monetary Authorities-Central Bank	↓
		Securities, Commodity Contracts, and Other Financial Investments and Related Activities	↑
	Real Estate and Rental and Leasing	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	↑
		Real Estate	↑
		Rental and Leasing Services	↑
Trade, Transportation, and Utilities	Transportation and Warehousing	Air Transportation	↑
		Couriers and Messengers	↑
		Pipeline Transportation	↑
		Postal Service	↓
		Rail Transportation	↓
		Scenic and Sightseeing Transportation	↑
		Support Activities for Transportation	↑
		Transit and Ground Passenger Transportation	↑
		Truck Transportation	↑
		Warehousing and Storage	↑
		Water Transportation	↑
	Utilities	Utilities	↓
	Wholesale Trade	Merchant Wholesalers, Durable Goods	↓
		Merchant Wholesalers, Nondurable Goods	↑
		Wholesale Electronic Markets and Agents and Brokers	↑
	Retail Trade	Building Material and Garden Equipment and Supplies Dealers	↑
		Clothing and Clothing Accessories Stores	↑
		Electronics and Appliance Stores	↑
		Food and Beverage Stores	↑
		Furniture and Home Furnishings Stores	↑
		Gasoline Stations	↑
		General Merchandise Stores	↑
		Health and Personal Care Stores	↑
		Miscellaneous Store Retailers	↑
		Motor Vehicle and Parts Dealers	↑
		Nonstore Retailers	↑
		Sporting Goods, Hobby, Musical Instrument, and Book Stores	↑
Leisure and Hospitality	Arts, Entertainment, and Recreation	Amusement, Gambling, and Recreation Industries	↑
		Museums, Historical Sites, and Similar Institutions	↑
		Performing Arts, Spectator Sports, and Related Industries	↑
	Accommodation and Food Services	Accommodation	↑
		Food Services and Drinking Places	↑
Other	Other Services (except Public Administration)	Personal and Laundry Services	↑
		Private Households	↓
		Religious, Grantmaking, Civic, Professional, and Similar Organizations	↑
		Repair and Maintenance	↑