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TRAVEL AND TOURISM EMPLOYMENT IN WISCONSIN: MOVING BEYOND AGGREGATE ESTIMATES AND CONVENTIONAL WISDOM

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Travel and Tourism Employment in Wisconsin: Moving beyond aggregate estimates and conventional wisdom

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Abstract: Travel and tourism represent important economic activities that contribute to the vibrancy of Wisconsin communities and provide an income source for many of our State's citizens. Understanding the role of tourism in providing income requires a thorough assessment of occupational structure and labor market characteristics. Furthermore, spatial differences of where labor is employed and income is generated is needed to better understand the role of tourism across the varied landscapes of our state; from our urban and suburban communities to the remote, rural towns found throughout the Northern, Central, and Southwestern portions of Wisconsin. In this report, we document results of a study that attempts to provide this more detailed assessment using secondary data from a variety of standardized sources and primary data collected through a series of focus group interview. Results suggest that aggregate statistics on total jobs created and income generated mask important elements that allow a more complete understanding of the jobs and income created by travel and tourism sectors as they respond to the spending of tourists in Wisconsin.

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I. Introduction

Tourism industry assessments are filled with definitional confusion and analytical complexity. Yet, careful investigations of the supply side components of tourism are critical to the creation of informed public policy and integrative tourism planning. While much is known about the demand for tourism resources that lead to advertising and marketing initiatives, little is known about the inputs required to produce tourism itself. Understanding these inputs is necessary if we wish to address important issues related to the private business climate of tourism; examples include labor skill matching and job creation, investment risk, and land use. These inputs also provide the basis upon which we can address the use and management of publicly provided amenity resources that create a primary motivating element behind tourist travel to Wisconsin. Simply said, the foundation upon which we build tourism is not well-understood. This report is written as an analytical initiative to more clearly understand Wisconsin labor resources used in tourism.

A review of the literature

Although a significant amount of literature helps in understanding the elements associated with developmental impacts of tourism in their aggregate, tourism itself remains rather ill-defined and non-standardized. Stephen Smith argues that the limitations of secondary data representing the tourism sector makes defining tourism supply difficult (Smith 1987; 1998). Given mixed demand sources, it is argued that tourism supply necessarily must rest on a definition of the tourism sector that specifies the extent of tourism reliance. Although criticized

as an oversimplification of the complex and partially industrialized structure of tourism supply, Smith's perspective emphasizes the measurement of scale, performance, and economic impacts for locality-specific firms catering to travelers and visitors (c.f. Leiper 1990; Eadington and Redman 1991; Gibson 1993; Ioannides and Debbage 1998).

A key element in community support of tourism development is its ability to create jobs. Many argue that policy-makers base decisions on tourism promotion and development from a job-creation standpoint without sufficient information on the actual employment-performance of tourism industries (Hudson and Townsend 1993; Leiper 1999; Hall 2000). Analysis of tourism employment needs to account for more than simply numbers of jobs. The types of jobs created from the standpoint of wage rates, permanence, career opportunities, and skill levels employed is important. Indeed, many have identified that jobs in tourism tend to be relatively low wage, seasonal, and part-time (Stynes and Pigozzi 1983; Blank 1989; Luloff et al. 1994) and often act against the regional developmental objective of high wage job creation (Pond 1988; Bernhardt, Dresser, and Hatton 2003a).

Some have argued that tourism tends to generate an over-abundance of seasonal, part-time employment opportunities primarily geared to first-time workers and young people with little work experience. In addition, these types of job opportunities are argued to be an important supplemental income component for retired people and others who are experiencing work transitions. On the other hand, for certain types of tourism jobs, lucrative career ladders exist. Examples include professional entertainers and athletes, hotel and gaming managers, tourism establishment engineers, and highly-skilled personal service occupations such as chefs and directors of sport facilities (ski directors and golf pros). Also, meeting planners, tourism marketing professionals, and public sector jobs are key steps on career ladders that can build from entry level positions in tourism.

Tourism businesses tend to provide incentives for entrepreneurial behavior of individuals. Ladkin (1999) in work-life research, finds that many people enter tourism jobs from other industries and that tourism skill sets tend to have background impacts favoring entry-level positions while still making it possible for motivated individuals to work up through ranks thus attaining more managerial and professional positions. Szivas, Riley, and Airey (2003) in similar focused research found that patterns of mobility, orientation to work, and self-evaluation are hallmarks of successful tourism workers. In particular, accelerated opportunity for advancement and incentives for entrepreneurialism lead to general satisfaction of those who successfully remain employed by tourism businesses. Their results suggest that tourism employment as a "way of life" supported the notion that people were prepared to surrender education-occupation compatibility in return for a more self-controlled work-life relationships.

The wide variety of employment types in travel and tourism businesses has regional development dimensions from the perspective of generating a widely varying set of income streams. The issue of income distribution is complex and empirical work has not yet generated sufficiently robust results to inform generalized theoretical approaches. A limited number of studies have evaluated the distributional effects of alternative sectors including tourism (Wagner 1997; Lee and Kang 1998; Leatherman and Marcouiller 1996, 1999) showing mixed results while clearly identifying critical developmental linkages. Results of work by Lee and Kang (1998) suggest that tourism generates a moderately equal distribution of earnings; comparable to other secondary and tertiary industries, but it performs poorly as compared with primary industries such as agriculture, forestry, and mining. The Lee and Kang results also suggest that tourism is primarily a low-wage industry and thus more likely to improve living standards

for those who find themselves in the lower income classes as compared to secondary and tertiary sectors.

Again, more research into income distribution is needed to provide useful input into public policy responses. There are interesting connections between income distribution and other elements important to tourism. For instance, in recent work by Fernández-Morales (2003), seasonality was shown to be an important element in explaining the distribution of income. The results of this research suggest that during peak tourism seasons, income inequality decreased with the most pronounced period of high income inequality occurring during the “off-season”. This makes intuitive sense but highlights the need for further research prior to sounding distributional alarms. Also, in research from the U.S. Lake States (Marcouiller, Kim, and Deller 2004), latent amenity inputs (such as water resources) are shown to be significant explanatory factors in understanding the distribution of income leading to several implications, one dealing with quality-of-life tradeoffs.

Without thorough analysis and based on ad-hoc conventional wisdom, the availability of employment opportunities resulting from tourism demands is often seen either as beneficial and appropriate to local labor markets or acting against community-determined economic development goals. An underlying tension exists within the conventional wisdom related to tourism which can be characterized by extremes that reflect two ill-conceived positions. On the one hand, proponents of tourism argue that broad based employment benefits are substantial and clearly justify large marketing subsidies to increase the incidence of tourist travel. On the other, opponents of tourism argue that the jobs created by tourism firms tend to be low wage, seasonal, and lacking substantial benefits thus public resources targeting the creation of jobs are best placed with industrial sectors characterized by higher wage/benefit and year-round employment

opportunities. Both arguments rest on a dearth of objective labor market assessments for tourism.

This need to focus on quantifying tourism employment poses difficulties due to the fact that considerable debate currently exists among researchers on the question of just what comprises employment in tourism. Johnson and Thomas (1990) outline two methods of tracking tourism employment. The first of these is the *expenditure method* that identifies ratios used to derive employment figures from expenditure data. This method provides the closest approximation of employment directly attributable to tourists since base data are tourist expenditures. Limitations of this method include the assumptions used in identifying ratios and the inability to support an estimate with standard employment data sources. Much of the tourism analysis using regional input-output tables rely on this ratio approach as a basis for employment estimates (c.f. Bergstrom et al. 1990; Johnson and Moore 1993; Marcouiller et al. 2002; Daniels, Norman, and Henry 2003).

The second employment tracking technique is the *employment count method* that identifies employment in tourism-related industries as identified by specific NAICS categories and relies upon count data from firms. The benefits of this method are that counts agree with standard reporting sources and the ability to identify employment in industries that may be enabling to tourism, but not reliant on tourism. Limitations of this method include the inability to separate reliant employment from enabling employment. This limitation is alleviated by strategic identification of tourism enabling industries and tourism reliant industries by NAICS code. Brown and Connelly (1986) studied employment in tourism using this employment count method and identified other benefits from using data that is regularly published by stable sources. These benefits speak toward the ability to track tourism employment over time, particularly throughout the various seasons of the year. Furthermore, regularly published secondary data allows researchers

to track tourism industries over time. Combinations and hybrid approaches rely on regional science technique to alleviate empirical caveats of the two approaches (Leatherman and Marcouiller 1996).

It is also important to realize that an assessment of labor used in tourism is incomplete without a full assessment of the self-employed component including both business owners and their families. Proprietor's income can be used as a proxy to show the benefits to business owners where wages may be insufficient to account for all earnings derived from tourism supply. Most contemporary assessments of tourism industries do a poor job of capturing this element. Often, the entrepreneurial opportunity afforded to those who are self-employed is a primary underlying objective in tourism development policy. Evidence supporting this statement is found in arguments promoting the generation of tourism-related business benefits in local communities. The available secondary data on proprietor's income can be compared with other data elements to provide a more complete picture of income derived from tourism activity.

Objectives of this project

The key question being addressed in this research involves an assessment of labor use by tourism/travel-related firms in Wisconsin and its resulting return in terms of income. Simply stated, what are the characteristics of labor use and return from tourism? Specifically, analysis will extend previous research to a Wisconsin-specific context by compiling and analyzing data that builds a profile of tourism industry activity including the following initial objective:

Specify key NAICS sectors that are reliant on travel-based tourism for all or part of their annual demand and develop estimates of the portion of receipts accruing to labor use by sector and occupational class.

Specific research objectives act to develop and estimate specific state-level and sub-state regional tourism employment attributes as follows:

1. Quantify annual wage/salary employment by source using various income and labor force metrics (wage and salary compensation, total number of jobs).
2. Distinguish this wage/salary employment by the types of occupations employed and respective compensation rates.
3. Qualitatively characterize the context of travel and tourism sector labor use and other regional characteristics of local labor markets.
4. Develop sectoral estimates of proprietor's income (investment return) to capture tourism-related labor resources employed by owners of businesses.

This report is written to advance these objectives and provide a supply perspective on the travel and tourism dependent component of the Wisconsin economy. It is organized into three subsequent sections. First, we outline the necessary components of our research approach by briefly describing the methods used to collect and summarize the data. Second, the results of our work are described and discussed. We conclude with a section that summarizes the effort and provides a starting point for key public policy implications that can be inferred from our work.

II. Methods used to address objectives

In collaboration with Wisconsin Department of Tourism staff, we identified several key attributes that helped guide our compilation of evidence to address the project objectives. This approach involved collection of quantitative data from secondary data sources on labor employed, income derived, and occupational structure within constituent industrial sectors. Furthermore, our method also included the collection of qualitative information that helped provide context to the secondary data. This latter qualitative data was collected through the use of focus group interviews conducted across the state.

As discussed in the introductory essay, the definition of what makes up tourism remains rather nebulous and evades simple characterization. For this project, both the quantitative and qualitative data relied on a specified sectoral range that we posit represents the tourism industry. Quite specifically, it more closely represents those sectors that are, in part or in total, reliant on tourists as a demand source. For our ability to gather secondary data, it is necessarily based on a supply side, or industry, perspective that allows clear delineation of sectors upon which we collect secondary data. This sectoral range is specified in Table 1.

For the purpose of this study, the travel and tourism industry was limited to the private economic sectors that are directly reliant on travel-based tourism for all or part of their annual demand. This definition does not take into account other segments of the industry that are direct beneficiaries of traveler expenditures. Examples include convention and visitor bureaus, trade associations, meeting planners, chambers of commerce, governmental agencies and other organizations charged with promotion. These types of non-profit or public organizations also employ people who are directly related to the frontline travel related private businesses and often provide high-level employment opportunities. Additionally, a variety of other industries indirectly benefit from traveler expenditures. These

Table 1. Sectoral range within which data is summarized

(specific detail beyond the 3 digit NAICS level can be obtained online at <http://www.census.gov/epcd/naics02/naicod02.htm>)

NAICS sectors comprising travel/tourism (inclusive to sequential levels):

Retail trade (portion) including:

- 447 Gasoline Stations
- 448 Clothing and Clothing Accessory Stores
- 453 Miscellaneous Store Retailers (including Gift, Novelty, and Souvenir)

Passenger transportation (portion) including:

- 481 Air Transportation
- 487 Scenic and Sightseeing Transportation

Arts, entertainment and recreation (portion) including:

- 711 Performing Arts and Spectator Sports
- 712 Museums, Parks, and Historical Sites
- 713 Amusement, Gambling, and Recreation

Accommodation and Food Services (inclusive):

- 721 Accommodation
 - 722 Food Services and Drinking Places
-

include, but are not limited to advertising agencies, media companies, lawyers, accountants and other professional service occupations.

The data collected for these sectors includes wage and salary income from employment covered by unemployment insurance. Income from self employment (e.g. return to sole proprietors) is captured as proprietor's income in a similar sectoral grouping. Small inconsistencies between sectoral groupings exist because the data sources for wage and salary income differed from that used for proprietor's income. These inconsistencies were minor; the groupings are generally comparable (specific detail is found below).

Quantitative data collection

A variety of datasets were used to compile base data and disaggregate control totals into an occupational structure. National, state and county level industrial (NAICS) data for 2002 was obtained from the Quarterly Census of Employment and Wages (QCEW) available through the State of Wisconsin Department of Workforce Development and the U.S. Bureau of Labor Statistics (U.S. BLS 2004a and U.S. BLS 2004b). The industry data includes all workers covered by unemployment insurance, or about 97.1% of all non-farm jobs (U.S. BLS 2004c). Occupational data came from the same agencies under a different program known as the Occupational Employment Statistics (OES) Survey. This OES data provided numbers of employees, wage rates and percentile distributions based on standard occupational classifications (SOC). Population counts were obtained from the reported 2002 county estimates published by the U.S. Census Bureau (2004).

Proprietor's income by county for the general sector groupings were obtained from MicroIMPLAN (Minnesota IMPLAN Group 2004) datasets for 2001 (the latest available at this writing). IMPLAN provides a bridge that was used to match industrial categories to the specified NAICS sectors. Only one sector was not properly matched; Scenic and Sightseeing Transportation. The figures reported by IMPLAN included support functions and corresponded to both NAICS sectors 487 and 488, whereas our wage and salary employment data from the BLS only accounts for NAICS sector 487.

Qualitative information gathering

To assist in understanding the data on labor use, we also collected information from business owners and employees across the state. The information that we sought from these local stakeholder groups was contextual in-

nature. Contextual issues included such topics as (1) the nature of tourism-type jobs, (2) the business climate and issue of return on investment for tourism business owners, (3) the seasonality of tourism business and the impact this has on local labor markets, and (4) important aspects of public policy that can affect local labor markets.

Our approach in developing, conducting, and analyzing this contextual data relied heavily on the focus group approach as outlined in Krueger (1994), Stewart and Shamdasani (1990), Morgan (1988), and Templeton (1987). A focus group interview is a carefully planned, informal, small group discussion. It is designed to collect information by getting participants to talk about their ideas and perceptions of a specific topic or issue. Each focus group was comprised of 5 to 10 people. The intent of these focus groups was to obtain a broad contextual basis upon which to assess the validity of secondary data and obtain insights into local labor markets as they relate to tourism & travel businesses from knowledgeable sources.

Focus group interviews were conducted in seven sites that were chosen to reflect the variety of situations found across the state. To match the secondary data, we attempted to focus on sites that were (1) large urban (Milwaukee), (2) suburban or micropolitan (Fond du Lac and Wausau), and (3) remote and rural (Shawano). Also, given the special characteristics of tourism regions, we chose to conduct focus groups in Wisconsin's unique tourism regions. These included the Wisconsin Dells, Door County, and Bayfield.

An analysis of focus group interviews was conducted based on responses to previously identified questions, statements, and probes. Specifically, all focus group interviews were recorded and content analysis was performed on responses to each question posed during the focus group. Where useful, specific quotations were pulled from focus group sessions to emphasize important issues. A sample thematic agenda for the focus groups is found in Appendix A.

Compilation and analysis of information

Secondary data was compiled, cleaned, and summarized for use in several distributions. From QCEW data the quarterly reported establishments and employees were averaged to obtain an annual mean for those categories. This was completed for each industry at the county level. Reported wages were aggregated from quarters to an annual total. The average annual wage was calculated by dividing the wage total by the average number of employees. In counties with lower levels of economic activity, QCEW data was often suppressed for certain sectors. Because statewide totals were known, we were able to distribute remaining wages, employees and firms to non-reporting counties on the basis of county population. This was done in several steps. In each county with disclosure problems, the total of wage/salary income and employment from counties without disclosure problems (EC^r) was subtracted from the reported statewide total (EC^{WI}) to derive the unreported portion (EC^d) as shown in equation (1).

$$EC^d = EC^{WI} - \sum EC^r \quad (1)$$

This total amount of undistributed income or employment was then allocated to the counties with disclosure problems based on population (divided by a coefficient related to the population of each county as a proportion of all those experiencing suppression problems).

After all wage and salary income and employment were distributed to the suppressed counties, industry totals were derived for the state and each county. Totals and percentages were then calculated on the basis of the three regions identified by Beale codes (shown in Figure 1 and further explained below).

Occupational data by SOC is only cross-referenced with NAICS industrial sectors at the national level. It is assumed that occupational structure at the local

level does not vary from the national structure; this remains as a limitation of our work. The distributional coefficients relating wage/salary income and employment in each occupational category were applied to the state and county totals for each industry obtained from the NAICS analysis. This gave an estimate of workers and wage/salary income in each occupation within each specified industry at the county level. The occupational structure for each sector at the county level was then aggregated up to provide totals for each respective region.

The following distributional equation was used in developing occupational structure:

$$OS_i = \alpha_i (EC^r) \quad (2)$$

Where occupations structure (OS) for occupational class i is simply a proportion, a , for each class multiplied by the total characteristic, EC (either employment or income) for each region, r . Given availability of data, calculation of a for each industrial sector was done at the national level.

Spatially, there were interesting differences among various sub-state regions across the state that we were interested in summarizing. The data is presented by relevant region in Wisconsin. For summary purposes, we present disaggregated regional data based on a county's degree and intensity of urban development (its place along the rural to urban continuum). This has been operationalized by the USDA Economic Research Service using what are known as Beale Codes which place a county along the rural to urban continuum using key spatially-defined demographic elements, such as population and adjacency to metropolitan area (USDA 2004). The 2003 Beale Codes (sometimes also referred to as "Rural-urban Continuum Codes") form a classification scheme that distinguishes metropolitan counties by size and nonmetropolitan counties by degree of urbanization and proximity to metropolitan areas. The standard Office

of Management and Budget (OMB) metropolitan and nonmetropolitan categories have been subdivided into three metropolitan and six nonmetropolitan categories, resulting in a 9-part county codification.¹ The specific elements that define respective Beale Codes include the following:

Metropolitan counties:

- 1 Counties in metro areas of 1 million population or more
- 2 Counties in metro areas of 250,000 to 1 million population
- 3 Counties in metro areas of fewer than 250,000 population

Nonmetropolitan counties:

- 4 Urban population of 20,000 or more, adjacent to a metro area
- 5 Urban population of 20,000 or more, not adjacent to a metro area
- 6 Urban population of 2,500 to 19,999, adjacent to a metro area
- 7 Urban population of 2,500 to 19,999, not adjacent to a metro area
- 8 Completely rural or less than 2,500 urban population, adjacent to a metro area
- 9 Completely rural or less than 2,500 urban population, not adjacent to a metro area

To simplify our work, we combined Beale Codes into three distinct categories that can be defined as Urban and Suburban (Codes 1, 2, 3), Exurban or Suburban Proximate (Codes 4, 5, 6), and Rural Remote (Codes 7, 8, 9). For Wisconsin counties, these groupings are shown in Figure 1. We recognize that our labels differ from the standard descriptions and are somewhat ad-hoc; however, we feel they accurately reflect a simple synopsis of the codes they represent. As noted in Figure 1, the urban and suburban portion of Wisconsin includes the Southeastern counties along Lake Michigan from Kenosha, into Milwaukee and up through the Fox River Valley. Also included in this grouping are the counties of Dane and its surrounding region, the Western suburbs of the Twin Cities, and the

¹ This scheme was originally developed in 1974. The codes were updated in 1983 and 1993, and slightly revised in 1988. The 1988 revision was first published in 1990. This scheme allows researchers to break county data into finer residential groups, beyond metropolitan and nonmetropolitan, particularly for the analysis of trends in nonmetropolitan areas that are related to population density and metropolitan influence.

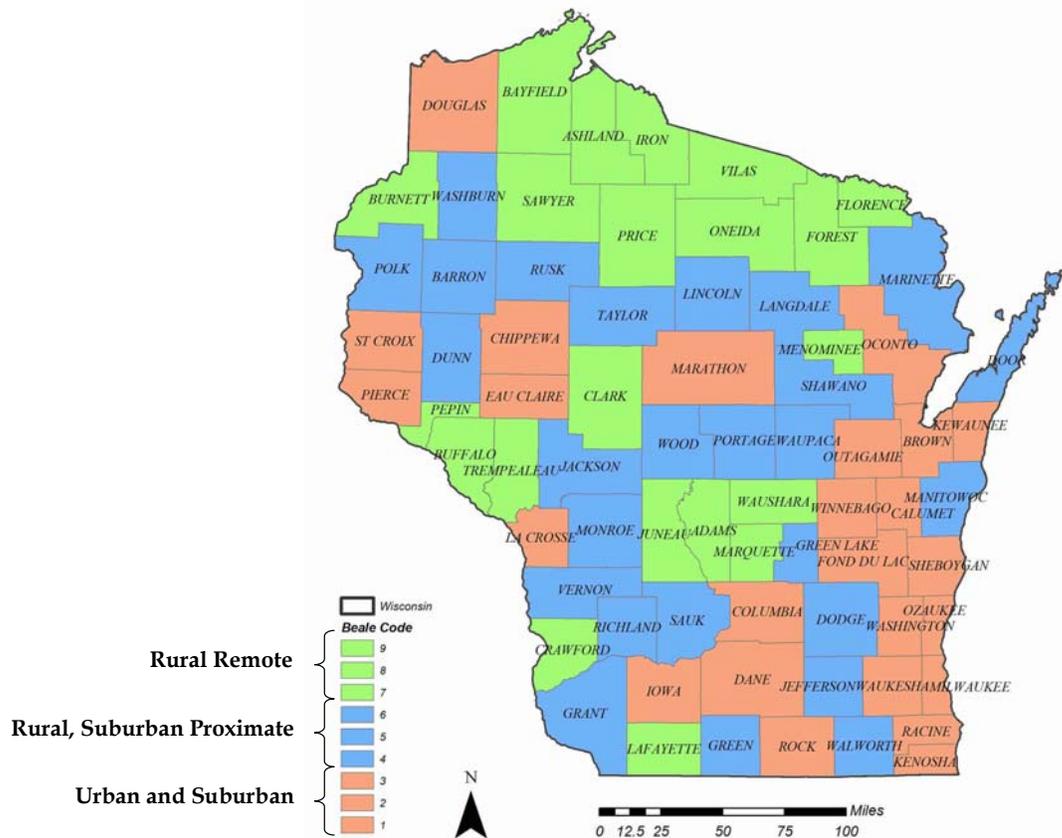


Figure 1. Wisconsin counties and their respective position along a rural to urban continuum, summarized into major categories of (1) urban & suburban, (2) exurban, suburban proximate, and (3) rural, remote based on Beale Codes.

micropolitan regions of Wausau (Marathon County), Eau Claire/Chippewa), and La Crosse. In the northern part of the state, Douglas County is included in this category due to the presence of the Superior/Duluth metropolitan region. In total, 25 of Wisconsin’s 72 counties are categorized as metropolitan. On the other end of the spectrum are remote rural counties in Wisconsin. Examples include the Northern tier of counties and several counties in Central and Southwestern Wisconsin. Of the 72 counties in the state, 21 are classified in the category of rural and/or remote. In between, we find the exurban counties that are either small

urban or suburban proximate; both of which are experiencing significant urbanization pressure from their closely proximate urban neighbors.² The remaining 26 counties of the state fall into this category.

The dataset developed for this research was compiled, cleaned, corrected, and then summarized based on each of these spatial and sectoral elements. This was done using Microsoft Excel. Graphical summaries of data that highlight the spatial distribution of data were done using ArcView GIS 8.2 software. All datasets and graphical presentations are also available from the authors (see the available files online at www.wisc.edu/urpl/people/marcouiller/index.html accessed in the “Projects” subdirectory).

III. Descriptive results

In the aggregate, industries used to define travel and tourism in Wisconsin comprised an important set of firms that span retail, transportation, and personal service sectors. It is important to note that the scope of this research focused on a supply-side characterization of the travel and tourism industry and did not distinguish important demand elements of each sector necessary for a strict tourism and/or travel-based definition. Namely the amount of out-of-region demand (the tourism component) for each sector may vary from low (clothing

² We realize that our combination of Beale codes contains some overlapping elements. We chose to combine 4, 5, and 6 due to the overriding element of urbanization pressure but realize that we combine both small urban yet remote regions with suburban proximate regions. Here, we grapple for a term to define such regions but have made this specification due to the continual process of exurbanization that provides a key element of sociodemographic and economic change. Likewise, the latter grouping termed rural, remote also includes some overlapping urban proximate counties; grouped here because of their dominating rural nature (no single community with a population of over 2,500). Alternatively, an interesting regional combination could have separated metro proximate counties (4, 6, and 8) from remote (non-proximate) counties (5, 7, and 9). These and other regionalizations remain as possible future research directions.

retailers) to high (accommodations). Earlier work specific to Wisconsin counties provided estimates of this regional demand attribute (Leatherman and Marcouiller 1996). A demand-based disaggregation remains beyond the scope of the work reported here. Taken in their entirety, the estimates of employment and income presented in this report provide an overestimate of the effect that travel and tourism demands present due to the mixture of local and non-local demands. Because of this supply-side characteristic, the results presented are not directly comparable to estimates that are based on traveler expenditures or demand-driven tourism activity.

For purposes of organization, our results will begin with aggregate characteristics of wage and salary employment by the ten sectors defined to encompass travel and tourism in Wisconsin. Reporting of disaggregate data for wage and salary income will then be presented spatially (across three distinct regional delineations) and then by occupational category. This is followed by a summary of results for proprietor's income by sector for each of the three regional delineations in Wisconsin. We close this section with a synthesis that ties together contextual elements obtained through focus group interviews of tourism business owners.

Aggregate labor characteristics

In viewing the datasets developed for this work, aggregate characteristics of wage and salary labor use in travel and tourism sectors suggest interesting aspects that have both sectoral and spatial components. We begin our discussion of aggregate wage and salary characteristics by first describing the sectoral elements for the state as-a-whole. This summary is found in Table 2.

Table 2. Wisconsin aggregate wage & salary characteristics by sector (2002).

Sector Name	NAICS Code	Establishments (# firms)	Employment (total jobs)	Total Wages (\$ 2002)
Gasoline Stations	447	2434	23501	\$324,952,144
Clothing and Clothing Accessory Strs	448	1840	18402	\$272,034,000
Miscellaneous Store Retailers	453	2542	19266	\$316,742,314
Air Transportation	481	105	4971	\$188,633,903
Scenic & Sightseeing Transportation	487	41	389	\$7,284,041
Performing Arts & Spectator Sports	711	542	7398	\$342,651,156
Museums, Parks, & Historical Sites	712	111	2238	\$48,695,619
Amusement, Gambling, & Recreation	713	1681	31718	\$455,012,351
Accommodation	721	1543	31638	\$435,236,559
Food Services & Drinking Places	722	11101	177692	\$1,685,725,950
Total		21940	317212	\$4,076,968,037

In total, the ten sectors we used in defining the travel and tourism industry accounted for almost 22,000 individual firms who employed slightly more than 317,000 people paying them a total of about \$4 billion in wage and salary income during 2002. In looking across the ten sectors used to define travel and tourism, clearly the largest individual sector was Food Services and Drinking Places with a total amount of wages paid of roughly 40 percent of the earnings or about \$1.7 billion in 2002. This was followed by Amusements, Gambling, and Recreation and Accommodations.

Spatially, aggregate travel/tourism sector employment and income was not distributed evenly but had a distinct pattern that was closely correlated with population density. This is shown for wage and salary income in Figure 2. Note from this Figure that the more urban counties in Southeastern Wisconsin (Milwaukee, Dane, and others) and the Fox River Valley (Brown, Outagamie, and Winnebago) showed the highest levels of both employment and income while the smaller urban counties of Marathon, Eau Claire, and La Crosse had relatively smaller amounts of labor use.

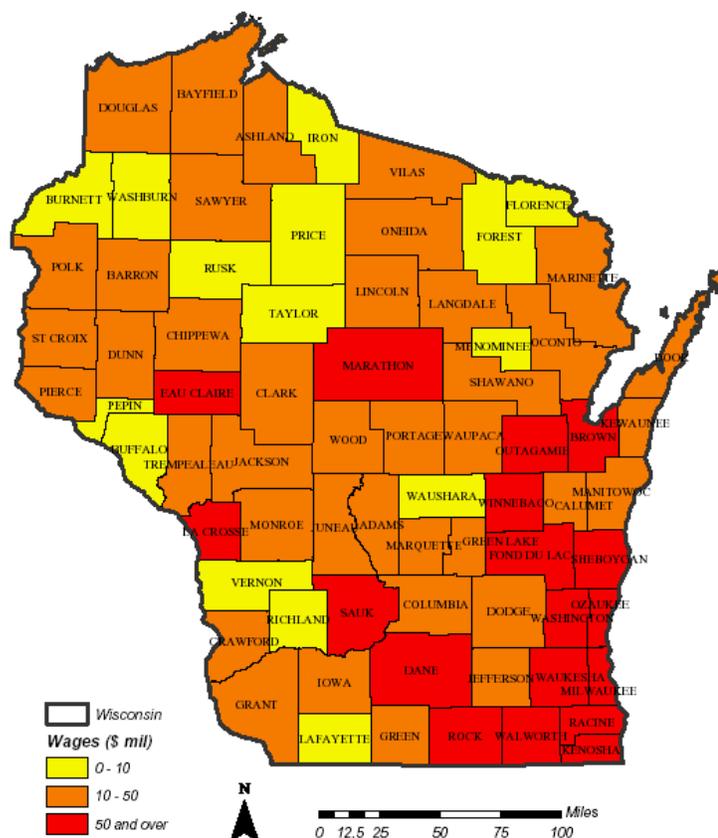


Figure 2. Total wage and salary income from travel and tourism sectors by county in Wisconsin (2002).

It is interesting to note that with the exception of Sauk County, the unique tourism regions of Wisconsin (Door County, Bayfield, and the Wisconsin Dells) had lower absolute amounts of travel and tourism income (wage and salary) when compared to these more urban counties. Certainly, this picture changes when we look at the relative dependency of this type of employment relative to total wages paid (next section).

A similar pattern in spatial distribution of employment in total numbers of jobs is shown in Figure 3. Given different scales, the relative position of several counties changes slightly but maintains the same general spatial pattern.

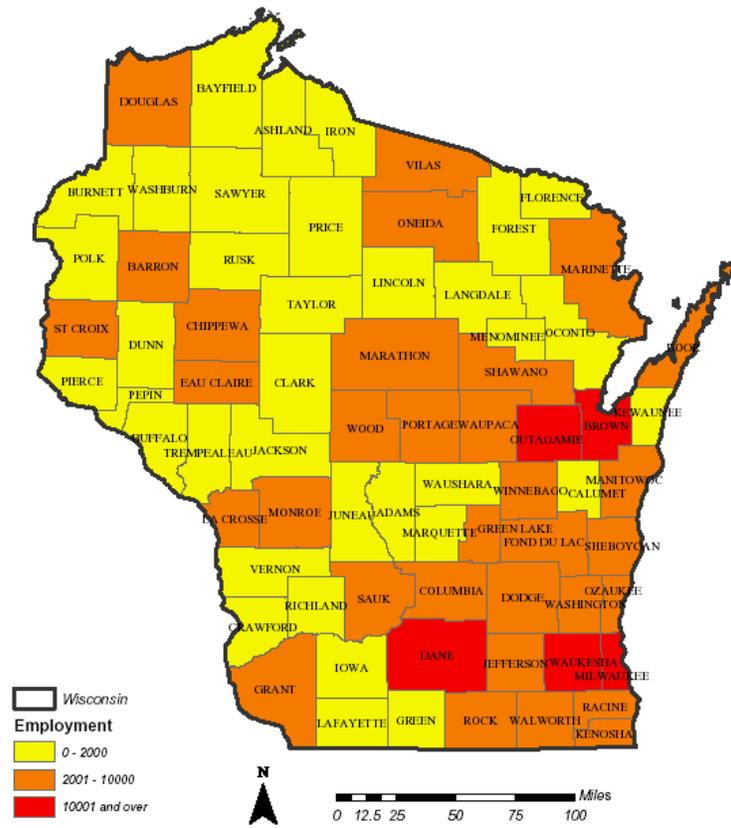


Figure 3. Total employment in travel and tourism sectors by county in Wisconsin (2002).

Tourism dependence. This picture of spatial distribution changes dramatically when we view the importance of travel and tourism labor from the perspective of total amounts of employment across all sectors of a county’s economy. This perspective is shown in Figure 4 and clearly emphasizes the increased importance of travel and tourism throughout the remote rural portion of Wisconsin. Also, here is where we more clearly see the dominance of these sectors in the unique tourism regions of Door County, Bayfield, and the Wisconsin Dells.³

³ Note that whereas the city of Wisconsin Dells lies in Columbia County, the massive incidence of Dells tourism occurs in Lake Delton (Sauk County).

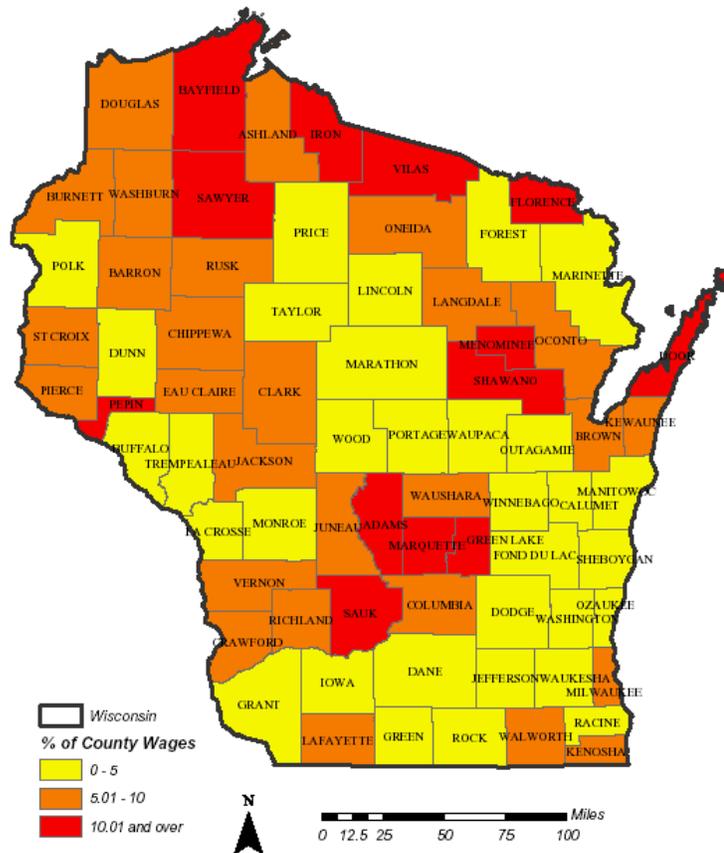


Figure 4. Percentage of total wage and salary income generated from travel and tourism sectors

It is clear from the spatial distribution shown in Figure 4 that employment resulting from travel and tourism reliant businesses have a relatively more significant impact in the rural regions of the state. Conversely, given the volume of employment options available in the urban and suburban regions, the impact on employment of travel and tourism reliant businesses are less dramatic in these counties.

The spatial distribution of labor and income

While the Wisconsin landscape can easily be characterized as fairly rural, there are several metropolitan and “micropolitan” areas that are unique from both demographic and economic perspectives. These urban areas tend to dominate industrial activity including that which occurs within the travel and tourism sectors. The urban and suburban counties of Wisconsin are where the majority of people live and, consequently, comprise the location of a majority of economic activity.

The distribution of travel and tourism industry activity varied widely across the state and is presented graphically in Tables 3 (wage and salary income) and 4 (employment). From these tables, it is important to note that travel and tourism industry earnings were highly concentrated in the 25 urban and suburban counties. These counties accounted for over $\frac{3}{4}$ of all wage and salary income and roughly 72 percent of all travel and tourism sector jobs. On the other end of the scale, the 21 counties that comprise remote, rural Wisconsin contained only 6 percent of the wage and salary income and slightly less than 7 percent of the travel and tourism sector jobs.

This said, there was wide variation among sectors in the location of travel and tourism activity. For instance, almost 95 percent of the Air Transportation income and employment occurred in urban and suburban Wisconsin. This is to be expected due to the location of major airports. On the other hand, the Accommodations sector, which is a key travel and tourism sector, was much more dispersed across the state with only about 62 percent of income and 58 percent of jobs occurring in urban and suburban Wisconsin. This same dispersed pattern was also evident in the Gasoline Stations sector and, to a lesser degree, in the Amusement, Gambling, and Recreation sector.

The largest rural remote shares of travel and tourism industry activity occurred in the Accommodations and Gasoline Stations sectors.

Table 3. Wages and salaries paid by travel/tourism sectors and geographic location in Wisconsin (2002)

Tourism-sensitive Sector Name	NAICS Code	Urban and Suburban ¹ (Beale Codes 1 - 3)		Exurban, Suburban Proximate ² (Beale Codes 4 - 6)		Rural Remote ³ (Beale Codes 7 - 9)		Wisconsin Total
		Wages (\$)	Wages (%)	Wages (\$)	Wages (%)	Wages (\$)	Wages (%)	Wages (\$)
Gasoline Stations	447	\$204,685,934	63.0%	\$84,528,423	26.0%	\$35,737,787	11.0%	\$324,952,144
Clothing & Clothing Accessories Stores	448	\$233,065,942	85.7%	\$22,705,672	8.3%	\$16,262,386	6.0%	\$272,034,000
Miscellaneous Store Retailers	453	\$246,466,327	77.8%	\$51,359,787	16.2%	\$18,916,201	6.0%	\$316,742,314
Air Transportation	481	\$178,837,827	94.8%	\$7,200,733	3.8%	\$2,595,344	1.4%	\$188,633,903
Scenic & Sightseeing Transportation	487	\$5,134,912	70.5%	\$1,636,385	22.5%	\$512,745	7.0%	\$7,284,041
Performing Arts and Spectator Sports	711	\$327,070,575	95.5%	\$12,171,486	3.6%	\$3,409,096	1.0%	\$342,651,156
Museums, Parks and Historical Sites	712	\$39,853,802	81.8%	\$7,046,321	14.5%	\$1,795,496	3.7%	\$48,695,619
Amusement, Gambling & Recreation	713	\$306,759,495	67.4%	\$109,045,151	24.0%	\$39,207,706	8.6%	\$455,012,351
Accommodation	721	\$267,934,889	61.6%	\$123,712,114	28.4%	\$43,589,556	10.0%	\$435,236,559
Food Services and Drinking Places	722	\$1,297,156,829	76.9%	\$304,321,840	18.1%	\$84,247,281	5.0%	\$1,685,725,950
All Tourism-sensitive Sectors		\$3,106,966,531	76.2%	\$723,727,910	17.8%	\$246,273,597	6.0%	\$4,076,968,037

1. Urban counties include those classified as metropolitan. In Wisconsin, there are 25 counties in this category (see Figure 1).
2. Exurban, suburban proximate counties include those non metropolitan counties that are either proximate to metropolitan counties or contain small urban cities. In Wisconsin, there are a total of 26 counties in this category (see Figure 1).
3. Rural, remote counties are those counties that are completely rural or rural and not directly adjacent to a metropolitan county. In Wisconsin, there are a total of 21 counties in this category (see Figure 1).

Table 4. Employment (total number of jobs) by tourism sector and geographic location in Wisconsin (2002)

Tourism-sensitive Sector Name	NAICS Code	Urban and Suburban ¹		Exurban, Suburban Proximate ²		Rural Remote ³		Wisconsin Total
		(Beale Codes 1 - 3)	(Beale Codes 4 - 6)	(Beale Codes 7 - 9)	(Beale Codes 7 - 9)	(Beale Codes 7 - 9)		
		Employment (jobs)	Employment (%)	Employment (\$)	Employment (%)	Employment (\$)	Employment (%)	Employment (\$)
Gasoline Stations	447	14,050	59.8%	6,651	28.3%	2,801	11.9%	23,501
Clothing and Clothing Accessories Stores	448	15,939	86.6%	1,612	8.8%	851	4.6%	18,402
Miscellaneous Store Retailers	453	14,597	75.8%	3,313	17.2%	1,356	7.0%	19,266
Air Transportation	481	4,718	94.9%	186	3.7%	67	1.3%	4,971
Scenic and Sightseeing Transportation	487	279	71.8%	83	21.4%	26	6.8%	389
Performing Arts and Spectator Sports	711	5,998	81.1%	1,122	15.2%	278	3.8%	7,398
Museums, Parks and Historical Sites	712	1,781	79.6%	361	16.1%	95	4.3%	2,238
Amusement, Gambling & Recreation	713	21,559	68.0%	7,514	23.7%	2,645	8.3%	31,718
Accommodation	721	18,390	58.1%	9,603	30.4%	3,646	11.5%	31,638
Food Services and Drinking Places	722	131,334	73.9%	36,523	20.6%	9,835	5.5%	177,692
All Tourism-sensitive sectors		228,645	72.1%	66,968	21.1%	21,599	6.8%	317,212

1. Urban counties include those classified as metropolitan. In Wisconsin, there are 25 counties in this category (see Figure 1).
2. Exurban, suburban proximate counties include those non metropolitan counties that are either proximate to metropolitan counties or include small urban cities. In Wisconsin, there are a total of 26 counties in this category (see Figure 1).
3. Rural, remote counties are those counties that are totally rural or rural and not directly adjacent to a metropolitan county. In Wisconsin, there are a total of 21 counties in this category (see Figure 1).

Occupational structure of wage & salary labor used in travel and tourism sectors

A key element of interest in our work was the disaggregation of income and jobs by standard occupational category and how these metrics vary both spatially and between sectors. It is important to note that the work presented here allows a more complete assessment of both the range of annual income accruing to individual occupational categories and the relative extent (number of jobs) of each occupation by region. This is presented by the ten travel and tourism sectors for each of the three sub-state regional categories. Since the data is presented by total number of jobs and annual wage/salary income, there is the possibility of some misinterpretation given seasonality of labor use and part-time nature of certain occupations. For contrast, we have also included a dataset that focuses on hourly wage rates by selected occupation relevant to travel and tourism (see Appendix B). Unfortunately, these datasets are not specified by sector of employment nor do they match with our regional delineations. Thus they do not provide comparable matches with the detailed data by sector presented in this report but are presented for illustrative purposes.

To reiterate, the data we present on occupational structure is based on total wage and salary income and total numbers of jobs distributed by SOC. This is based on the 2002 calendar year and was obtained from the Quarterly Census of Employment and Wages (QCEW), State of Wisconsin Department of Workforce Development and the U.S. Bureau of Labor Statistics.

Gasoline Stations sector (447). The occupational structure of the Gasoline Stations sector is summarized in Table 5. Statewide, this sector employed about 23,500 people generating almost \$325 million in wage and salary income. Within the gasoline station sector, the volume of wages and number of jobs is heavily weighted toward the Sales and Related category, providing nearly seventy-five percent of the jobs and seventy-two percent of the wages. Management and Business/Financial occupations combined account for one percent of the positions

Table 5. Occupational structure of the Gasoline Stations Sector (447) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	161	\$6,725,441	76	\$2,777,381	32	\$1,174,250	269	\$10,677,071
Business and Financial Operations Occupations	36	\$749,484	17	\$309,512	7	\$130,859	60	\$1,189,855
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Food Preparation and Serving-Related Occupations	1826	\$22,470,025	864	\$9,279,366	364	\$3,923,225	3054	\$35,672,616
Building and Grounds Cleaning and Maintenance Occupations	167	\$2,205,225	79	\$910,684	33	\$385,028	279	\$3,500,936
Personal Care and Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Sales and Related Occupations	10512	\$146,506,414	4976	\$60,502,233	2096	\$25,579,750	17584	\$232,588,397
Office and Administrative Support Occupations	352	\$5,905,928	167	\$2,438,950	70	\$1,031,164	589	\$9,376,042
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Installation, Maintenance, and Repair Occupations	740	\$16,152,639	350	\$6,670,498	147	\$2,820,221	1237	\$25,643,358
Production Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Transportation and Material Moving Occupations	257	\$3,970,779	121	\$1,639,798	51	\$693,291	429	\$6,303,868
Total	14050	\$204,685,934	6651	\$84,528,423	2801	\$35,737,787	23501	\$324,952,144

1. Regions as specified in Figure 1

and three and one-half percent (3.65%) of the wages. In aggregate for the State, the average annual wage/salary income per job was just under \$14,000 (\$13,827) with the highest annual income accruing to Management Occupations (1.1% of all jobs with an annual wage/salary of \$39,627). The lowest paid occupations were classified in the Food Preparation and Serving Related category (13.0% of all jobs with an annual wage/salary of \$11,682). Regionally, the highest average annual wage/salary incomes for all occupations in this sector were found in urban and suburban counties (\$14,569) and the lowest occurred in exurban, suburban proximate counties (\$12,710). Average annual wage/salary income in remote rural Wisconsin was slightly higher at \$12,760.

Clothing and Clothing Accessory Store sector (448). The occupational structure of wage/salary jobs in the Clothing and Clothing Accessory Store sector is summarized in Table 6. This sector, statewide, employed about 18,400 people of which nearly 80% were sales related and accounted for seventy-three percent of the \$272,034,000 in wage and salary income. Not surprisingly, we see the urban region dominating the sector with eight-six percent (86.6%) of the jobs and wages (85.7%). On average, jobs in this sector paid almost \$15,000 annually. Statewide, the average annual wage/salary income was highest for Management categories (1.2 percent of all jobs earning, on average \$48,700 annually) and lowest for Building and Grounds Cleaning and Maintenance (.1% of all jobs earning, on average about \$10,600). Interestingly, when viewed regionally, this sector paid higher wages and salaries per job in rural remote Wisconsin (average all jobs \$19,121) than in either urban suburban counties (\$14,622) or exurban, suburban proximate counties (\$14,082).

Miscellaneous Store Retailers sector (453). The occupational structure of wage/salary jobs in the Miscellaneous Store retailers sector is summarized in Table 7. This sector showed a somewhat more diverse distribution of jobs and wages than the more stratified Gasoline Station and Clothing Retail sectors. Here,

Table 6. Occupational structure of the Clothing and Clothing Accessory Store sector (448) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	195	\$9,390,011	20	\$914,790	10	\$655,196	225	\$10,959,998
Business and Financial Operations Occupations	204	\$6,040,634	21	\$588,489	11	\$421,491	235	\$7,050,613
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	89	\$1,859,259	9	\$181,132	5	\$129,731	102	\$2,170,123
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Food Preparation and Serving-Related Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Building and Grounds Cleaning and Maintenance Occupations	18	\$185,914	2	\$18,112	1	\$12,972	20	\$216,999
Personal Care and Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Sales and Related Occupations	12643	\$170,149,550	1279	\$16,576,252	675	\$11,872,338	14597	\$198,598,140
Office and Administrative Support Occupations	1418	\$22,227,702	143	\$2,165,460	76	\$1,550,958	1637	\$25,944,120
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Installation, Maintenance, and Repair Occupations	89	\$1,496,443	9	\$145,786	5	\$104,416	102	\$1,746,644
Production Occupations	1161	\$19,998,717	117	\$1,948,308	62	\$1,395,429	1340	\$23,342,454
Transportation and Material Moving Occupations	124	\$1,717,712	13	\$167,342	7	\$119,855	143	\$2,004,909
Total	15939	\$233,065,942	1612	\$22,705,672	10	\$16,262,386	18402	\$272,034,000

1. Regions as specified in Figure 1

Table 7. Occupational structure of the Miscellaneous Store Retailers sector (453) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	262	\$11,916,846	59	\$2,483,287	24	\$914,614	345	\$15,314,747
Business and Financial Operations Occupations	87	\$2,351,255	20	\$489,965	8	\$180,458	115	\$3,021,679
Computer and Mathematical Occupations	16	\$384,355	4	\$80,094	1	\$29,499	21	\$493,948
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	1142	\$17,188,769	259	\$3,581,875	106	\$1,319,232	1507	\$22,089,875
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Food Preparation and Serving-Related Occupations	79	\$922,720	18	\$192,281	7	\$70,818	105	\$1,185,819
Building and Grounds Cleaning and Maintenance Occupations	151	\$2,045,649	34	\$426,282	14	\$157,003	199	\$2,628,934
Personal Care and Service Occupations	79	\$999,900	18	\$208,364	7	\$76,742	105	\$1,285,006
Sales and Related Occupations	9610	\$155,050,266	2181	\$32,310,088	893	\$11,900,051	12684	\$199,260,405
Office and Administrative Support Occupations	1483	\$24,661,895	337	\$5,139,159	138	\$1,892,791	1957	\$31,693,846
Farming, Fishing, and Forestry Occupations	56	\$825,723	13	\$172,068	5	\$63,374	73	\$1,061,165
Construction and Extraction Occupations	8	\$170,816	2	\$35,595	1	\$13,110	10	\$219,521
Installation, Maintenance, and Repair Occupations	476	\$11,889,456	108	\$2,477,580	44	\$912,511	628	\$15,279,547
Production Occupations	206	\$3,702,550	47	\$771,554	19	\$284,169	272	\$4,758,274
Transportation and Material Moving Occupations	944	\$14,356,125	214	\$2,991,595	88	\$1,101,827	1245	\$18,449,548
Total	14597	\$246,466,327	3313	\$51,359,787	1356	\$914,614	19266	\$316,742,314

1. Regions as specified in Figure 1

sixty-six percent of the 19,266 jobs and sixty-three percent of the \$316,742,314 in wages were found in Sales Related occupations, ten percent of both the jobs and wages were found in the Office and Administrative Support classification, eight percent of the jobs (7.8%) and seven percent of the wages accrued in the Arts, Design, Entertainment, etc. group and two percent (2.4%) of the jobs in the Management and Business/Financial categories. Statewide, the average annual wage/salary income for all occupations was roughly \$16,500 with the Management category again being the highest paid wage/salary job classification (1.8% of all jobs earning, on average, \$44,350). Of all jobs in this sector, urban and suburban counties had the highest average annual wage/salary income at \$16,885 with rural remote counties having the lowest average of just under \$14,000.

Air Transportation sector (481). The occupational structure of wage/salary jobs employed in the Air Transportation sector is summarized in Table 8. This sector is among the smallest among the sectors examined and the urban region accounts for ninety-five percent of the 4971 jobs and \$188,633,903 paid in wages. Statewide, the majority (46.9%) of the occupations were classified in the Office and Administrative Support category and an additional twenty-three percent (22.7%) in the Installation, Maintenance and Repairs category. On average across all occupations, the Statewide annual wage/salary income in this sector was roughly \$38,000, second highest and just below Performing Arts and Spectator Sports.

Scenic and Sightseeing Transportation sector (487). The occupational structure of wage/salary jobs employed in the Scenic and Sightseeing Transportation sector is summarized in Table 9. This sector was the smallest of all the travel and tourism sectors examined in this study employing 389 people and generating \$1,399,471 in wage and salary incomes. The majority (72%) of the jobs were found in urban and suburban counties with an additional twenty-one percent found in the exurban, suburban proximate counties. Over one-third (35.7%) of the occupations we classified in the Personal Care and Service category

Table 8. Occupational structure of the Air Transportation sector (481) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Business and Financial Operations Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Food Preparation and Serving-Related Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Building and Grounds Cleaning and Maintenance Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Personal Care and Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Sales and Related Occupations	113	\$5,803,352	4	\$233,666	2	\$84,220	119	\$6,121,238
Office and Administrative Support Occupations	2214	\$68,745,970	87	\$2,767,990	31	\$997,660	2333	\$72,511,620
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Installation, Maintenance, and Repair Occupations	1069	\$46,204,248	42	\$1,860,370	15	\$670,529	1127	\$48,735,146
Production Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Transportation and Material Moving Occupations	1321	\$58,084,257	52	\$2,338,707	19	\$842,935	1392	\$61,265,899
Total	4718	\$178,837,827	186	\$7,200,733	67	\$2,595,344	4971	\$188,633,903

1. Regions as specified in Figure 1

Table 9. Occupational structure of the Scenic and Sightseeing Transportation sector (487) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	36	\$986,562	11	\$314,396	3	\$98,513	50	\$1,399,471
Business and Financial Operations Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Food Preparation and Serving-Related Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Building and Grounds Cleaning and Maintenance Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Personal Care and Service Occupations	100	\$1,424,937	30	\$454,096	9	\$142,287	139	\$2,021,320
Sales and Related Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Office and Administrative Support Occupations	43	\$920,735	13	\$293,418	4	\$91,940	60	\$1,306,093
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Installation, Maintenance, and Repair Occupations	29	\$661,527	9	\$210,814	3	\$66,057	40	\$938,398
Production Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Transportation and Material Moving Occupations	72	\$1,141,151	21	\$363,660	7	\$113,949	100	\$1,618,760
Total	279	\$986,562	83	\$1,636,385	26	\$98,513	389	\$1,399,471

1. Regions as specified in Figure 1

and an additional twenty-six percent occurred in the Transportation segment. Statewide, on average, jobs in this sector earned about \$18,725 annually.

Performing Arts and Spectator Sports sector (711). The occupational structure of wage/salary jobs employed in the Performing Arts and Spectator Sports sector is summarized in Table 10. The Performing Arts sector was also most dominant in urban and suburban counties and comprised nearly ninety-six percent of the \$342,651,156 in wages and eighty-one percent of the 7398 jobs. This sector had the highest average annual wage/salary income per job at slightly over \$46,000. Occupational categories were quite diverse within this segment. Statewide, the largest category was in the Arts, Design, Entertainment, etc. segment but only constituted twenty-six percent of the jobs and 38% of the wages. The second largest occupational segment was the Office and Administrative Support which comprised about 15% of the jobs and eleven percent of the wages.

Museums, Parks, and Historic Sites sector (712). The occupational structure of wage/salary jobs employed in the Museum, Parks, and Historic Sites sector is summarized in Table 11. Not as diverse in occupational types as the Performing Arts and Spectator Sports sector, the Museums, Parks, and Historic Sites sector employed 2,238 people and generated \$48,695,619 in wage and salary income. Over eighty percent (81.8%) of the wages were paid in the urban regions of the state and provided about eighty percent (79.6%) of the total number of jobs in this sector. Statewide, the four largest occupational categories were Personal Care, Education and Training, Office and Administrative Support and, Sales. Personal Care provided twenty-three percent of the jobs and fourteen percent of the wages while each of the other three produced about 13 - 16% of the jobs. Education and Training accounted for 18% of the wages and Office and Administrative, which provided about the same number of positions, comprised 14% of the wages.

Table 10. Occupational structure of the Performing Arts and Spectator Sports sector (711) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	284	\$33,807,812	53	\$1,258,112	13	\$352,383	350	\$35,418,306
Business and Financial Operations Occupations	178	\$12,555,105	33	\$467,221	8	\$130,863	220	\$13,153,190
Computer and Mathematical Occupations	41	\$2,810,884	8	\$104,603	2	\$29,298	50	\$2,944,785
Life, Physical, and Social Science Occupations	24	\$1,548,487	5	\$57,625	1	\$16,140	30	\$1,622,252
Education, Training, and Library Occupations	295	\$11,114,093	55	\$413,596	14	\$115,844	364	\$11,643,532
Arts, Design, Entertainment, Sports, and Media Occupations	1540	\$124,710,553	288	\$4,640,933	71	\$1,299,873	1900	\$130,651,360
Healthcare Practitioners and Technical Occupations	295	\$13,700,480	55	\$509,845	14	\$142,802	364	\$14,353,127
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	186	\$6,602,587	35	\$245,706	9	\$68,820	230	\$6,917,113
Food Preparation and Serving-Related Occupations	381	\$13,204,588	71	\$491,391	18	\$137,633	470	\$13,833,611
Building and Grounds Cleaning and Maintenance Occupations	284	\$9,404,291	53	\$349,968	13	\$98,022	350	\$9,852,281
Personal Care and Service Occupations	859	\$25,627,337	161	\$953,686	40	\$267,117	1060	\$26,848,140
Sales and Related Occupations	268	\$10,306,524	50	\$383,543	12	\$107,426	330	\$10,797,493
Office and Administrative Support Occupations	892	\$37,301,645	167	\$1,388,130	41	\$388,799	1100	\$39,078,574
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	114	\$6,319,738	21	\$235,180	5	\$65,871	140	\$6,620,790
Installation, Maintenance, and Repair Occupations	138	\$8,354,541	26	\$310,903	6	\$87,080	170	\$8,752,524
Production Occupations	24	\$835,971	5	\$31,110	1	\$8,713	30	\$875,794
Transportation and Material Moving Occupations	195	\$8,865,939	36	\$329,934	9	\$92,411	240	\$9,288,283
Total	5998	\$327,070,575	1122	\$12,171,486	278	\$3,409,096	7398	\$342,651,156

1. Regions as specified in Figure 1

Table 11. Occupational structure of the Museums, Parks, and Historic Sites sector (712) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	124	\$7,114,678	25	\$1,257,905	7	\$320,531	156	\$8,693,114
Business and Financial Operations Occupations	45	\$1,503,966	9	\$265,907	2	\$67,757	57	\$1,837,630
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	282	\$7,178,250	57	\$1,269,145	15	\$323,395	354	\$8,770,790
Arts, Design, Entertainment, Sports, and Media Occupations	101	\$2,797,543	21	\$494,617	5	\$126,035	127	\$3,418,196
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	68	\$1,175,493	14	\$207,832	4	\$52,958	85	\$1,436,283
Food Preparation and Serving-Related Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Building and Grounds Cleaning and Maintenance Occupations	90	\$1,576,773	18	\$278,780	5	\$71,037	113	\$1,926,591
Personal Care and Service Occupations	406	\$5,510,708	82	\$974,317	22	\$248,269	510	\$6,733,293
Sales and Related Occupations	237	\$3,839,604	48	\$678,858	13	\$172,982	297	\$4,691,445
Office and Administrative Support Occupations	282	\$5,572,206	57	\$985,190	15	\$251,039	354	\$6,808,435
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	23	\$663,568	5	\$117,322	1	\$29,895	28	\$810,785
Installation, Maintenance, and Repair Occupations	68	\$1,813,967	14	\$320,717	4	\$81,723	85	\$2,216,406
Production Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Transportation and Material Moving Occupations	56	\$1,107,047	11	\$195,731	3	\$49,875	71	\$1,352,652
Total	1781	\$39,853,802	361	\$7,046,321	95	\$1,795,496	2238	\$48,695,619

1. Regions as specified in Figure 1

Amusement, Gambling, and Recreation sector (713). The occupational structure of wage/salary jobs employed in the Amusement, Gambling, and Recreation sector is summarized in Table 12. The Amusement, Gambling and Recreational sector was the second largest category in terms of jobs (31,718) and wages (\$455,012,351). Similar to the performing Arts and Spectator Sports sector, there was a wider distribution of job categories represented in this sector. While urban and suburban counties dominated the location of jobs and income in this sector, a rather surprising amount of employment activity was also found in exurban suburban proximate and rural remote counties. Urban and suburban counties accounted for sixty-eight percent of jobs and sixty-seven percent of the wages while the exurban, suburban proximate counties comprised twenty-four percent of the jobs and wages. Statewide, there appeared to be little variation in annual incomes with an average for all occupational categories in this sector of roughly \$14,300 per job annually ranging from a low of \$10,600 for Protective Service jobs (1.5% of all jobs) to a high of just over \$40,000 for Management jobs (3.4% of all jobs).

Accommodations sector (721). The occupational structure of wage/salary workers employed in the Accommodations sector is summarized in Table 13. This sector was the third largest among the sectors examined and produced 31,638 jobs generating \$435,236,559 in wage and salary income. The three largest occupational categories in this sector were Buildings and Ground Maintenance; Food Preparation and Serving Related; and, Office and Administrative Support. These made up 34%, 29% and 19% of all jobs in this sector respectively. Management and Business/Financial combined to account for six percent (5.7%) of the jobs and twelve and one-half percent (12.5%) of the wages. Buildings and Ground Maintenance produced thirty percent (29.7%) of the wages while Food Preparation provided twenty-five percent. Office and Administrative Support made up

Table 12. Occupational structure of the Amusement, Gambling, & Recreation sector (713) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	732	\$29,149,599	255	\$10,361,937	90	\$3,725,684	1076	\$43,237,219
Business and Financial Operations Occupations	261	\$5,533,994	91	\$1,967,193	32	\$707,314	384	\$8,208,501
Computer and Mathematical Occupations	9	\$206,121	3	\$73,271	1	\$26,345	13	\$305,736
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	244	\$3,294,752	85	\$1,171,200	30	\$421,111	359	\$4,887,063
Arts, Design, Entertainment, Sports, and Media Occupations	775	\$15,755,089	270	\$5,600,531	95	\$2,013,698	1141	\$23,369,317
Healthcare Practitioners and Technical Occupations	52	\$1,449,015	18	\$515,088	6	\$185,202	77	\$2,149,306
Healthcare Support Occupations	52	\$681,597	18	\$242,290	6	\$87,117	77	\$1,011,003
Protective Service Occupations	322	\$3,391,511	112	\$1,205,595	40	\$433,478	474	\$5,030,584
Food Preparation and Serving-Related Occupations	6655	\$77,363,931	2320	\$27,500,898	816	\$9,888,079	9791	\$114,752,908
Building and Grounds Cleaning and Maintenance Occupations	3563	\$47,796,797	1242	\$16,990,538	437	\$6,109,029	5241	\$70,896,365
Personal Care and Service Occupations	4643	\$59,961,570	1618	\$21,314,804	570	\$7,663,840	6831	\$88,940,213
Sales and Related Occupations	1490	\$19,813,933	519	\$7,043,346	183	\$2,532,469	2191	\$29,389,748
Office and Administrative Support Occupations	1672	\$24,883,947	583	\$8,845,607	205	\$3,180,480	2461	\$36,910,034
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	17	\$330,040	6	\$117,321	2	\$42,183	26	\$489,544
Installation, Maintenance, and Repair Occupations	828	\$13,994,914	288	\$4,974,834	102	\$1,788,725	1217	\$20,758,474
Production Occupations	17	\$253,212	6	\$90,010	2	\$32,364	26	\$375,586
Transportation and Material Moving Occupations	226	\$2,899,472	79	\$1,030,688	28	\$370,589	333	\$4,300,749
Total	21559	\$306,759,495	7514	\$109,045,151	2645	\$39,207,706	31718	\$455,012,351

1. Regions as specified in Figure 1

Table 13. Occupational structure of the Accommodations Sector (721) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	844	\$27,709,110	441	\$12,793,976	167	\$4,507,915	1452	\$45,011,001
Business and Financial Operations Occupations	198	\$5,780,133	104	\$2,668,829	39	\$940,353	341	\$9,389,315
Computer and Mathematical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	6	\$265,102	3	\$122,404	1	\$43,129	11	\$430,636
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	288	\$4,277,006	150	\$1,974,799	57	\$695,814	495	\$6,947,619
Food Preparation and Serving-Related Occupations	5307	\$67,442,132	2771	\$31,139,687	1052	\$10,971,966	9131	\$109,553,785
Building and Grounds Cleaning and Maintenance Occupations	6183	\$79,564,616	3229	\$36,736,936	1226	\$12,944,138	10638	\$129,245,690
Personal Care and Service Occupations	633	\$8,383,428	331	\$3,870,834	125	\$1,363,876	1089	\$13,618,138
Sales and Related Occupations	307	\$5,727,489	160	\$2,644,522	61	\$931,789	528	\$9,303,800
Office and Administrative Support Occupations	3478	\$50,358,554	1816	\$23,251,780	690	\$8,192,688	5984	\$81,803,023
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	19	\$696,659	10	\$321,664	4	\$113,337	33	\$1,131,660
Installation, Maintenance, and Repair Occupations	639	\$11,281,471	334	\$5,208,932	127	\$1,835,350	1100	\$18,325,753
Production Occupations	288	\$3,756,078	150	\$1,734,273	57	\$611,065	495	\$6,101,416
Transportation and Material Moving Occupations	198	\$2,693,112	104	\$1,243,476	39	\$438,135	341	\$4,374,722
Total	18390	\$267,934,889	9603	\$123,712,114	3646	\$43,589,556	31638	\$435,236,559

1. Regions as specified in Figure 1

nineteen percent (18.8%) of the wages paid. Statewide, on average, jobs in this sector earned about \$13,700 annually.

Food Services & Drinking Establishments Sector (722). The occupational structure of wage/salary jobs employed in the Food Services and Drinking Establishments sector is summarized in Table 14. This is the single largest sector among those considered in this study providing 177,692 jobs and \$1,685,725,950 in wages. Once again, the majority of the wages and jobs were found in the urban areas of the state (74% of jobs and 77% of the wages). Statewide, the Food Preparation and Related Services classification accounts for just over ninety percent (90.5%) of the jobs in this sector and eight-six and one-half percent of the wages. Management and Business/Financial combined account for two and one-half percent of the jobs and six percent of the wages. Statewide, the amount of average annual wage and salary income across all occupational categories was just under \$9,500, the lowest of all sectors examined in this research. This was slightly higher in urban and suburban counties (\$9,877) followed by remote rural counties (\$8,566) and exurban, suburban proximate counties (\$8,332). There was fairly wide variation in wage and salary income by occupational category from high average annual pay rates for Management (\$22,613) and Business & Financial Operations (\$21,759) to lower rates paid for Food Preparation and Serving Related jobs (\$9,069).

Of the occupational categories employed in the travel and tourism industry, the single dominant job type that warrants more focused study appears to be the Food Preparation and Serving Related occupational group. As shown in Figure 5, it accounts for a total of 58 percent of the jobs and 43 percent of the wage and salary income. Throughout each travel and tourism sector, it appeared as an important employment category and tended to have relatively lower levels of annual wage and salary income. This can be largely explained by the type of jobs covered in this category and their respective skill and responsibility levels.

Table 14. Occupational structure - Food Services & Drinking Establishments Sector (722) by region¹ in Wisconsin (2002)

Standard Occupational Categories (SOC)	Urban and Suburban		Exurban, Suburban Proximate		Rural, Remote		Wisconsin Total	
	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Number of Jobs	Wages Paid	Total Jobs	Total Wages Paid
Management Occupations	3177	\$74,803,623	884	\$17,549,440	238	\$4,858,319	4299	\$97,211,382
Business and Financial Operations Occupations	163	\$3,682,586	45	\$863,960	12	\$239,175	220	\$4,785,720
Computer and Mathematical Occupations	7	\$200,257	2	\$46,982	1	\$13,006	10	\$260,245
Life, Physical, and Social Science Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Education, Training, and Library Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Arts, Design, Entertainment, Sports, and Media Occupations	7	\$67,121	2	\$15,747	1	\$4,359	10	\$87,227
Healthcare Practitioners and Technical Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Healthcare Support Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Protective Service Occupations	207	\$1,997,230	58	\$468,564	15	\$129,715	280	\$2,595,509
Food Preparation and Serving-Related Occupations	118846	\$1,122,109,259	33050	\$263,254,486	8900	\$72,878,354	160797	\$1,458,242,099
Building and Grounds Cleaning and Maintenance Occupations	1781	\$17,041,490	495	\$3,998,050	133	\$1,106,805	2409	\$22,146,344
Personal Care and Service Occupations	140	\$1,538,282	39	\$360,891	11	\$99,908	190	\$1,999,081
Sales and Related Occupations	2594	\$25,075,074	721	\$5,882,783	194	\$1,628,567	3509	\$32,586,424
Office and Administrative Support Occupations	1167	\$15,695,741	325	\$3,682,328	87	\$1,019,401	1580	\$20,397,471
Farming, Fishing, and Forestry Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Construction and Extraction Occupations	0	\$0	0	\$0	0	\$0	0	\$0
Installation, Maintenance, and Repair Occupations	111	\$1,918,269	31	\$450,039	8	\$124,587	150	\$2,492,895
Production Occupations	1005	\$10,828,449	279	\$2,540,428	75	\$703,282	1360	\$14,072,159
Transportation and Material Moving Occupations	2128	\$22,199,449	592	\$5,208,142	159	\$1,441,802	2879	\$28,849,393
Total	131334	\$1,297,156,829	36523	\$304,321,840	9835	\$84,247,281	177692	\$1,685,725,950

1. Regions as specified in Figure 1

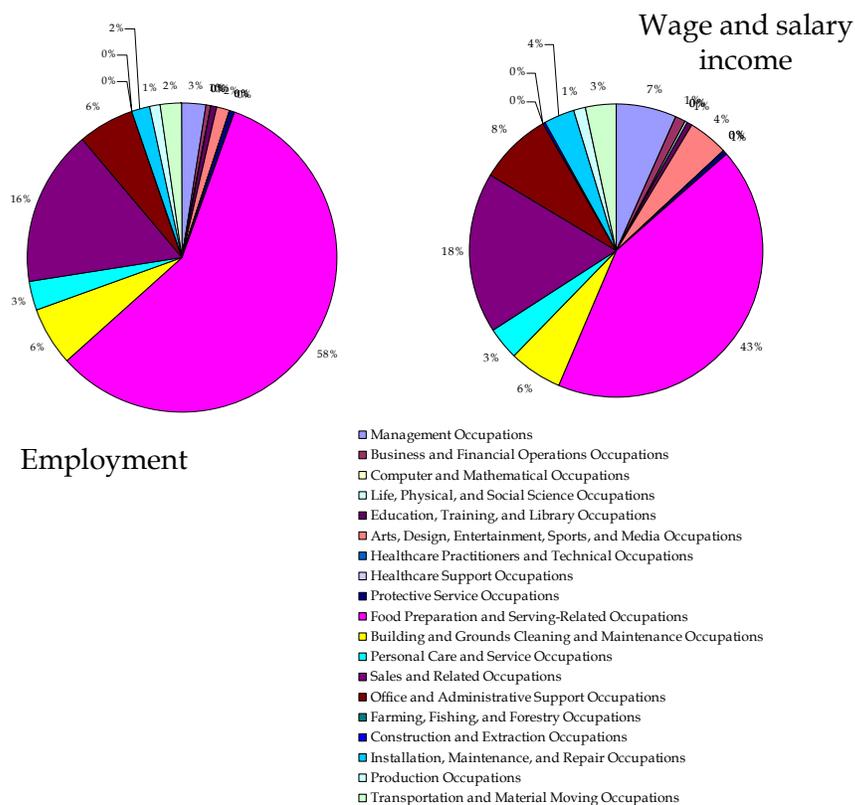


Figure 5. Employment (# jobs) and wage & salary income (\$) by occupation of the combined travel and tourism industry in Wisconsin (as defined in this study for the year 2002)

To be sure, this low rate of pay could also be due to several additional factors beyond the control of our study including the prevalence of part-time and seasonal work. In addition, while the reporting of tip income is mandatory, there is likely some amount of under-reporting that helps explain this relatively low level of annual income.

Proprietor’s income in travel and tourism sectors

Wages and salaries include a large income component that represent much of the labor use in travel and tourism sectors. Another income component that

was included in our research effort was proprietor’s income, or the income that accrues to owners of the 22,000 or so travel and tourism sector firms throughout Wisconsin. These owners, while often not earning wages and salaries, generate income through the success of their business activity. Data that serves to proxy this income category is referred to as proprietor’s income and was collected through the use of MicroIMPLAN county-level models and 2001 datasets. This data is summarized in Table 15.

Table 15. Proprietor’s income for travel and tourism sectors by Wisconsin region (2001 from MicroIMPLAN models constructed by authors)

Travel and Tourism Sector	Urban and Suburban (\$ 2001)	Exurban, Suburban Proximate (\$ 2001)	Remote, Rural (\$ 2001)	Total Wisconsin (\$2001)	Portion by Sector (%)
Gasoline Stations	\$55,916,000	\$23,810,000	\$9,480,000	\$89,206,000	6.4%
Clothing and Clothing Accessories Stores	\$18,316,000	\$1,900,000	\$496,000	\$20,712,000	1.5%
Miscellaneous Store Retailers	\$41,965,000	\$9,259,000	\$2,069,000	\$53,293,000	3.8%
Air Transportation	\$6,259,000	\$58,000	\$11,000	\$6,328,000	0.5%
Scenic and Sightseeing Transportation	\$34,517,000	\$4,006,000	\$236,000	\$38,759,000	2.8%
Performing Arts and Spectator Sports	\$72,122,000	\$4,702,000	\$508,000	\$77,332,000	5.5%
Museums, Parks and Historical Sites	\$402,000	\$42,000	\$9,000	\$453,000	0.0%
Amusement, Gambling & Recreation	\$61,738,000	\$20,905,000	\$4,731,000	\$87,374,000	6.2%
Accommodation	\$40,855,000	\$22,537,000	\$9,053,000	\$72,445,000	5.2%
Food Services and Drinking Places	\$717,510,000	\$179,083,000	\$56,374,000	\$952,967,000	68.1%
Total	\$1,049,600,000	\$266,302,000	\$82,967,000	\$1,398,869,000	100.0%

As can be seen from the table, results suggest that proprietor’s income in the travel and tourism sectors amounted to roughly \$1.4 billion across the state of Wisconsin during 2001. Like wage and salary income, this was distributed across the state but appears fairly concentrated in the urban and suburban counties. Also, like wage and salary income, across all sectors, the highest amounts of proprietor’s income (roughly 68 percent) accrued to the Food Services and Drinking Places sector. Generalizations about the distribution of this income

across firms is difficult, at best. If this income is simply distributed evenly across the total number of travel and tourism firms across the state, results suggest that, on average, these firms generated roughly \$63,600 each in proprietor's income during 2001. Certainly the amount per firm would depend on the entrepreneurial success of each owner and would likely reflect the profitability of each individual business.

The context of travel and tourism labor markets

The focus group interviews provided important context to understanding the current state-of-affairs in travel and tourism labor market issues across Wisconsin. Our focus group interviews provided an important ability to speak with tourism business owners about labor market issues. What follows is a brief summary of our findings that are organized around key labor market issues.

Perception of tourism jobs. A common perception that tourism jobs are low wage, seasonal and without benefits was challenged by those we spoke with (primarily tourism business owners). While they acknowledged the reality of entry-level jobs, they preferred to concentrate on the ability of entry-level employees to rise to managerial and other better paying positions if they stayed with the business. Many of those we spoke with began their tourism jobs in high school, returned every summer, obtained college degrees and returned to higher-paid positions. Health benefits are sometimes available, more frequently to those who have full-time positions, along with other benefits such as 401(k) accounts. Many tourism jobs are summer seasonal, and these are often filled by teachers on summer break, by high school students, by retirees, and by young people visiting the United States from countries abroad.

Employee problems that affect business owners. We heard from a substantial number of employers that they have a difficult time finding employees who are willing to work on holidays such as the Fourth of July or Memorial Day,

or who want to work limited hours of their choice-- in other words, there is a lack of loyalty or commitment to their employers or their job. This was a common theme in different parts of the state, but seemed to be more of a problem where there was increased competition for employees such as in Bayfield, Shawano and Door County. This leads to another common issue, that of the availability of the local labor supply to meet the needs (demands) of tourism businesses. As mentioned earlier, employers are becoming more creative in finding employees, especially in the summer season jobs. Teachers from public and private school systems are seeking to supplement their salaries, and they often choose a tourism-related job for a variety of reasons. Retirees are another source of seasonal employees, although many of them wish to work higher-level jobs, and on a part-time basis. They are seldom interested in housekeeping or dishwashing jobs at a hotel or resort. Because of the challenge of finding employees who can stay beyond the first week of September, more and more young workers from abroad are filling those positions. From Bayfield to Door County to Wisconsin Dells, "migrant" workers take hundreds of jobs. According to many employers, these workers are willing to work extra hours, have more modest housing and other demands, will work for lower wages, and can be available from early to late season. In some cases, employers pay their visa fees and in other ways cultivate this labor market.

Positive elements of tourism jobs. A significant number of those business owners who we interviewed began their careers in the tourism industry while high school students. They stated that they enjoyed interacting with a variety of people, liked the flexibility of these jobs, and believe that their creativity was enhanced and supported by their employers. They see these job traits as fundamental to tourism careers. Being entrepreneurial is also associated with tourism. Many small businesses in the tourism sector were started by "entrepreneurs", by risk-takers, by "lone eagles", by those who are seeking more

than a secure income. We talked to some of them, and “quality of life” was mentioned as a primary reason for their choice. Proprietor’s income, sometimes modest, is one reason why they continue to operate tourism businesses. The ability to stay in a chosen location, to remain independent, to work together as a husband-wife team, and in addition to make a moderate income were desirable traits associated with their decision. One business owner mentioned the desire to pass their small, local motel on to their children, with the hope that they would keep it open.

Policy issues. When we asked the focus group participants to identify policy issues that need to be addressed on a broad basis, the following were mentioned by a number of the groups. Housing for employees was difficult to provide, whether in Bayfield or Door County, Shawano or Spring Green. This was not a problem where the local residents provided much of the employment base, such as in Fond du Lac, Milwaukee and Wausau. Health insurance was mentioned in a number of the focus groups as a major issue. Several businesses that initially provided this as a benefit can no longer afford to continue, at least at the current level. The recently legislated later school opening was reported to have helped with a major employee issue, but only to some degree. High school students want to have a few weeks to relax before school begins and college students often have to be back in the middle to end of August. Teachers also must return to begin preparation for the new school year. For this reason, retirees and foreign students are sought because this does not dictate their schedules and ability to work the shoulder seasons.

An issue related by those in the Milwaukee focus group was the fact that many attractions in Milwaukee and surrounding areas are provided by non-profit entities that do not have the cash-flow benefits of privately owned and operated attractions. Specifically mentioned were the Milwaukee County Zoo, the State Fair Park, and the Milwaukee Public Museum. Also, the Zoo is required to hire only

Milwaukee County residents, which adds a complexity to their hiring practices, and exacerbates the problem of finding employees beyond the typical summer season.

The main difference in issues identified between the urban focus groups and the rural ones was the ability to fill jobs from within the area, and housing for the employees who must come from other areas for a limited season. This was a major concern in Bayfield, Spring Green, Shawano, and Door County, but was not raised by employers and others in related tourism jobs in Fond du Lac, Wausau and Milwaukee.

IV. Discussion

Several aspects of the preceding analysis warrant further discussion. When we look at the spatial distribution of labor use in tourism, it is important to keep in mind the simple fact that there are wide variations in economic structure, wage rates, and cost of living between urban and rural Wisconsin. For illustrative purposes, we arrayed wage and salary income from travel and tourism sectors against the comparable average annual wage and salary income for all sectors by county. These regional differences in wage structure are outlined in Figure 6. It is interesting to note a couple of simple observations. First, in all counties, the aggregate travel and tourism sector earnings (wage and salary) were lower than the average for all sectors. Second, there was a general pattern to the income disparity across the state. Namely, rural regions had lower income differentials when compared to urban and suburban counties. This is despite the fact that with rare exception, the travel and tourism sectors generated absolute wage and salary income at disproportionately higher pay rates in urban and suburban counties.

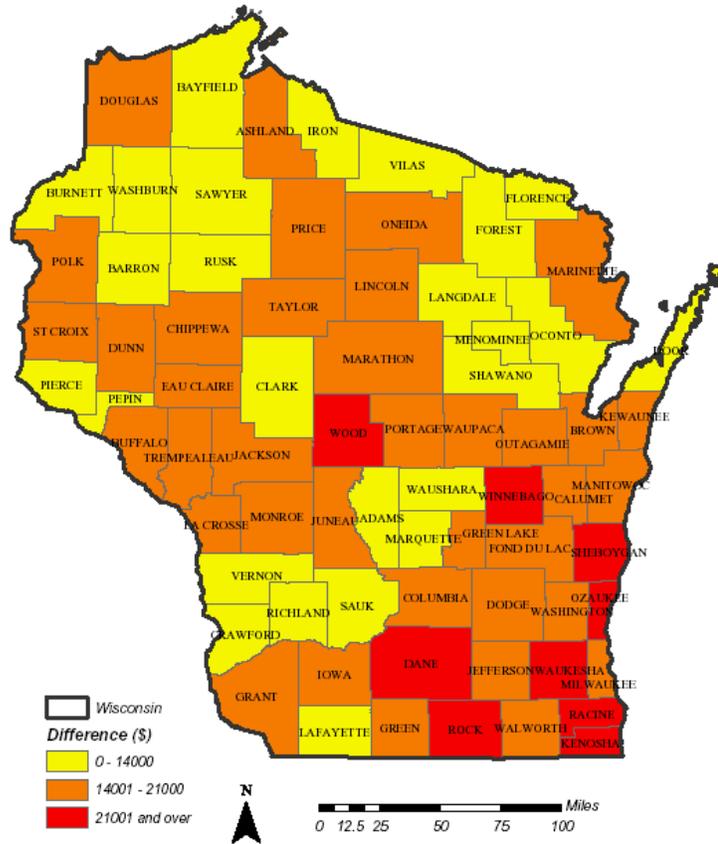


Figure 6. Wage differential between travel and tourism sectors and the prevailing average wage by county in Wisconsin.

When we compare the travel and tourism sectors to all other income generating activity throughout Wisconsin, it is apparent that these firms provide important job opportunities to low income households and provide employment opportunities to those who are entry-level workers, lack higher skill levels, are seeking supplemental income, or are retired or working for other non-monetary reasons. It is also evident from our data that there are significant career ladder opportunities available to those who are committed to the business. Examples of these career ladder opportunities include management, financial operations, professional skilled performers and other technical occupations.

It is also important to note that travel and tourism firms provide entrepreneurial opportunities to people who are interested in operating small businesses. At about \$1.4 billion in 2001 (approximately 1/3 of the absolute amount paid for wage and salary income), proprietor's income is significant and provides an important motivating factor behind successful business operation.

V. Summary, Policy Implications, and Further Research Needs

In this report, we describe the process and results of a year-long study that examined the structure of employment in Wisconsin's travel and tourism sectors. We combined quantitative data gathered from various sources with qualitative information gathered through focus group interviews to address the key objectives of this work.

Namely, objectives of this work included quantifying annual wage/salary employment by source using various income and labor force metrics that included wage & salary compensation and total number of jobs. Once compiled, another objective addressed occupational structure and attempted to distinguish this wage/salary employment by the types of jobs employed by each sector and their respective compensation rates. In addition to wage and salary income we also had the objective of estimating sectoral estimates for proprietor's income to provide an idea of the relative amounts of self-employed income being generated by travel and tourism businesses. These objectives were accomplished for 10 specific sectors at the county-level. This county-level dataset was then aggregated up into three sub-state regions (based on a counties position along the rural to urban continuum) for purposes of summarizing data representing travel and tourism labor markets.

In addition, an effort was made to collect qualitative information that characterized regional labor market issues specific to travel and tourism businesses. This was accomplished through a series of focus group interviews across the state with owners and operators of tourism businesses.

Results suggest that the travel and tourism industry is comprised of several sectors that are, more or less, dependent on travelers for a portion of their total receipts. These sectors employed over 300,000 people in 2002 and generated roughly \$4 billion in wage and salary income. Occupational structure of the wage and salary employment was concentrated in the Food Preparation & Serving and Sales occupations. Indeed, these two categories accounted for roughly 74 percent of the jobs and 60 percent of the wage and salary income of the total employment picture in the 10 sectors used to define travel and tourism. In addition, the roughly 22,000 firms accounted in this study generated roughly \$1.4 billion in proprietor's income that provides an important incentive for small business entrepreneurship across the state. Both wage and salary and self-employed income was concentrated in the 25 urban and suburban counties of Wisconsin.

The assessment of labor use in travel and tourism sectors was limited to the years of 2001 and 2002. Certainly, an important avenue for further research could pursue the development of historical time series data sets that could be used to assess change in occupational structure over time. This would allow a more complete assessment of key trends and explanatory elements used in forecasting future labor market characteristics.

Labor use in travel and tourism sectors was limited by definitions that provide a match with supply-side datasets on economic activity. For our purposes, we delineated travel and tourism in a rather ad hoc manner by specifying all activity in 10 "reliant" sectors including specific 3 digit NAICS sectors representing transportation, retail, and personal services. Certainly, alternative definitions could be used that more clearly specify private, quasi-

public, and public sector jobs that are directly and indirectly related to producing tourism output. This provides a rather substantial set of future research needs that more clearly characterizes how tourism is produced and builds on previous work by Smith (1987, 1998), Leatherman and Marcouiller (1996), Ioaniddes and Debbage (1998), Marcouiller (1998), Leiper (1999), and Hall (2000).

Furthermore, our work was limited to annualized estimates of income and jobs for travel and tourism sectors; many of which are characterized by relatively high incidence of part-time and seasonal jobs. For clarity on this issue, we also gathered data on hourly wage rates (see Appendix B) but because of non-specific sectoral estimates and non-county-based data sources, we weren't able to directly compare datasets to more completely inform the analysis. Interestingly, when we look at the annualized estimates (based on hourly wage rates) by occupation and factor in the types of occupations that dominate our 10 sectors and regional considerations, the values we report for annual wage and salary income are generally consistent with the estimates based on hourly rates. Certainly, an important avenue for further research could more clearly specify the extent of seasonality and part-time characteristics and build on previous research by Stynes and Pigozzi (1983), Krakover (2000), and Fernández-Morales (2003).

Regional analysis is also a key element of this research. Our assessment was limited to county-based estimates while for many regions, the county boundary is a fairly arbitrary geographic delineation. Further work could provide assessments at alternative geographic scales that include sub-county delineations. On a more macro-scale, our three region specification scheme allowed us to summarize a large dataset using generally reasonable rural to urban continuum groupings. This urban to rural context is important for several dimensions of tourism planning. For instance, differentiating seasonality by region is important. Krakover (2000) points out that the impact of seasonality on tourism operators is significant and that urban areas with large workforces are better matched to

fluctuating demands than are rural areas. The development context of remote rural counties is unique and provides stark contrast to more diverse economies found in urban and suburban Wisconsin.

Occupational structure and the distribution of income provide ample opportunities for further discussion. Our results confirm much of the descriptive results of Lee and Kang (1998). Namely, that travel and tourism sectors are an important generator of employment for entry-level people, those in transition and/or those seeking supplemental income sources. Generally considered a “low-wage industry”, travel and tourism are more likely to help in improving living standards for those who find themselves with limited skill sets or seeking work for quality-of-life and other non-monetary reasons. Further work is needed to confirm the hypothesis of tourism’s distributional “hollowing-out” effect. Certainly, additional work will continue to develop useful empirical policy-relevant investigations that view tourism and travel and one of several critical sectors to future community economic development throughout the Lake States. This work also provides a rather substantive future research need and can build from the previous work of Wagner (1997) Lee and Kang (1998), Leatherman and Marcouiller (1999), and Marcouiller, et al. (2004).

Our contextual understanding of travel and tourism in Wisconsin was limited to information gathered from tourism business owners and operators. While valuable to understand labor market issues facing employers, it lacks a certain element of labor market issues from the perspective of the employee. Future work could more fully capture the various elements of occupational structure and build on employee-focused research specific to the travel and tourism industry. For instance, work-history research by Ladkin (1999) argues that the information from detailed work history analysis has particular relevance for the hospitality and tourism industry. Despite a well-established use of life and work history data as a research method in the social sciences, as yet it has received

little application to hospitality and tourism research and remains as an important future research need.

Contemporary policy discussions surrounding travel and tourism are wide ranging. In addition to public budgetary subsidies for promotion, specific issues of public policy surround labor availability during peak tourism season through implementation of a school start policy after Labor Day, minimum wage laws, availability and legality of migrant labor, and training in hospitality sector skills to name just a few. Work by Belau (1999) at an international level and by Bernhardt, et al. (2003a and 2003b) attempt to frame policy discussion around an ability to affect high quality labor in tourism and develop “normative” inferences. Inferences from our work are limited to the “positive” attributes, or characteristics of labor use in travel and tourism sectors.

Finally, there is a continual need for further research into community-oriented and integrative tourism planning; this takes on both thematic and process elements. Incorporating wider stakeholder involvement in the planning process while developing a more complete understanding of the implications of tourism on local communities will inevitably lead to development that addresses key people-oriented needs found at the forefront of regional planning efforts throughout Wisconsin and across the Lake States.

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Appendix A

Gathering qualitative information using focus groups

Objectives:

Capture information about labor use in tourism not assessed in the secondary data sources. Develop a richer context from which to evaluate secondary data on tourism labor

Issues addressed:

Specifically, we are interested in the following issues:

1. Perceptions that labor use in tourism is characterized by:
 - a. dead-end jobs (underlying issue is the tourism job ladder)
 - b. low wage jobs (underlying issue is broader accounting for benefits)
 - c. seasonal jobs (vs. year-round and shoulders)
 - d. menial and subservient jobs (issue of fairness and compensation)
2. Income from tourism includes returns to entrepreneurial inputs
 - a. proprietor's income
 - b. return to land and capital investments
 - c. "performance incentives" income, including tips (wait staff, bartenders, musicians)
3. Non-local labor use and other relevant trends in tourism employment
 - a. seasonal attributes of migrant labor
 - b. labor related issues of migrants such as housing, medical care, etc.
4. Issues of public policy and tourism labor
 - a. minimum wage
 - b. migrant labor (documentation)
 - c. school starts
 - d. child labor laws, OSHA, etc.

Approach and Qualitative Method:

Gather data representative of the tourism industry across Wisconsin using focus groups in the following manner:

1. Regional approach
 - a. urban
 - b. suburban
 - c. rural
 - d. special (Dells and Door County/Bayfield)
2. Sectoral definition
 - a. Overnight accommodations (hotels, motels, B&B, resorts, camping)
 - b. Restaurants/taverns

- c. Recreation service (amusements, golf courses, ski areas, events, etc.)
 - d. Transportation related businesses (charter buses, trains, travel agents, etc.)
 - e. Retail (including miscellaneous retail and a TBD level of merchandise retail)
3. Target individual focus group interview session with 5 to 10 individuals each.
- a. 1 urban (Milwaukee - December)
 - i. hotels and restaurants
 - ii. events, casinos, zoos, museums
 - b. 2 suburban/small city (Wausau - November & Spring Green in June)
 - i. hotels and restaurants
 - ii. golfing, skiing, amusements
 - iii. arts (theatre, music) and culture (museums, events)
 - c. 1 rural (Shawano/Langlade Counties in June)
 - i. restaurants, bars, amusements
 - ii. resorts, B&Bs, campgrounds
 - d. 3-4 special (across sectors)
 - i. Dells (October)
 - ii. Door County (October)
 - iii. Apostle Islands/Bayfield (June)

Sample agenda for each focus group:

Icebreaker

Income from tourism includes returns to entrepreneurial inputs

proprietor's income

return to land and capital investments

"performance incentives" income, including tips (wait staff, bartenders,

Perceptions that labor use in tourism is characterized by:

dead-end jobs (underlying issue is the tourism job ladder)

low wage jobs (underlying issue is broader accounting for benefits)

seasonal jobs (vs. year-round and shoulders)

menial and subservient jobs (issue of fairness and compensation)

musicians)

Non-local labor use and other relevant trends in tourism employment

seasonal attributes of migrant labor

labor related issues of migrants such as housing, medical care, etc.

Issues of public policy and tourism labor

lack of sufficient local labor force

minimum wage

migrant labor (documentation)

school starts

child labor laws, OSHA, etc.

what types of policies would be appropriate to address these issues

Appendix B

Average annual and hourly wages by selected occupational categories relevant to travel and tourism sectors ^a (2003, Wisconsin Department of Workforce Development - http://www.dwd.state.wi.us/lmi/wages_oesmsa.htm)

SOC Code	Occupational Title	Annualized Wage	Hourly wage		
			Average ^b	Median ^c	Range
11-2031	Public relations managers	\$64,800	\$31.15	\$27.07	20.74 - 37.70
11-9051	Food service managers	\$39,470	\$18.97	\$17.78	13.99 - 23.06
11-9071	Gaming managers	\$52,740	\$25.36	\$22.15	20.02 - 27.13
11-9081	Lodging managers	\$36,250	\$17.43	\$15.36	12.44 - 21.40
13-1011	Agents and business managers of artists, performers, and athletes	\$45,860	\$22.05	\$16.41	12.61 - 36.94
13-1061	Emergency management specialists	\$48,220	\$23.18	\$21.70	17.32 - 28.96
13-1121	Meeting and convention planners	\$37,330	\$17.95	\$16.89	13.45 - 21.29
15-1041	Computer support specialists	\$39,060	\$18.78	\$17.85	14.91 - 21.68
19-3093	Historians	\$44,390	\$21.34	\$20.54	15.12 - 26.37
25-4010	Archivists, curators, and museum technicians	\$37,170	\$17.87	\$17.50	13.64 - 21.28
27-1011	Art directors	\$64,000	\$30.77	\$27.54	22.53 - 37.83
27-1026	Merchandise displayers and window trimmers	\$22,650	\$10.89	\$9.38	8.2 - 12.53
27-2021	Athletes and sports competitors	\$131,310	na	na	na
27-2041	Music directors and composers	\$33,220	na	na	na
27-2042	Musicians and singers	\$63,580	na	na	na
27-2099	Entertainers and performers, sports and related workers, all other	\$25,780	na	na	na
27-3031	Public relations specialists	\$43,610	\$20.97	\$19.40	15 - 26
29-9091	Athletic trainers	\$39,660	na	na	na
31-9011	Massage therapists	\$33,040	\$15.88	\$14.71	9.74 - 20.31
33-9031	Gaming surveillance officers and gaming investigators	\$26,290	\$12.64	\$12.53	9.79 - 14.76

SOC Code	Occupational Title	Annualized Wage	Hourly wage		
			Average	Median	Range
35-1011	Chefs and head cooks	\$28,660	\$13.78	\$11.59	9.73 - 16.16
35-1012	First-line supervisors/managers of food preparation and serving workers	\$26,980	\$12.97	\$12.34	9.69 - 15.59
35-2011	Cooks, fast food	\$15,250	\$7.33	\$7.14	6.25 - 8.24
35-2012	Cooks, institution and cafeteria	\$21,430	\$10.31	\$10.14	8.75 - 11.8
35-2014	Cooks, restaurant	\$19,900	\$9.57	\$9.22	7.81 - 10.9
35-2015	Cooks, short order	\$16,790	\$8.07	\$7.73	6.53 - 9.48
35-2021	Food preparation workers	\$17,700	\$8.51	\$8.29	7.24 - 9.73
35-3011	Bartenders	\$17,600	\$8.46	\$7.98	6.93 - 9.39
35-3021	Combined food preparation and serving workers, including fast food	\$15,800	\$7.60	\$7.47	6.31 - 8.6
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	\$15,530	\$7.47	\$7.41	6.43 - 8.37
35-3031	Waiters and waitresses	\$15,460	\$7.43	\$6.58	5.96 - 8.14
35-3041	Food servers, non-restaurant	\$18,530	\$8.91	\$8.59	7.46 - 10.28
35-9011	Dining room and cafeteria attendants and bartender helpers	\$14,680	\$7.06	\$6.69	6.01 - 7.88
35-9021	Dishwashers	\$14,950	\$7.19	\$7.02	6.17 - 8.13
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	\$16,320	\$7.85	\$7.59	6.53 - 8.62
35-9099	Food preparation and serving related workers, all other	\$19,360	\$9.31	\$9.07	7.77 - 10.7
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	\$31,950	\$15.36	\$14.76	11.3 - 18.58
37-1012	First-line supervisors/managers of landscaping, lawn service, and grounds-keeping workers	\$36,790	\$17.69	\$15.76	12.7 - 21.63
37-2012	Maids and housekeeping cleaners	\$17,520	\$8.42	\$8.20	7.25 - 9.5
39-1011	Gaming supervisors	\$38,270	\$18.40	\$19.16	15.26 - 21.56
39-1012	Slot key persons	\$27,500	\$13.22	\$12.59	10.58 - 14.45
39-1021	First-line supervisors/managers of personal service workers	\$32,260	\$15.51	\$13.87	11.23 - 17.66
39-3011	Gaming dealers	\$21,060	\$10.13	\$7.18	6.28 - 9.16
39-3021	Motion picture projectionists	\$22,050	\$10.60	\$8.67	7.45 - 11
39-3031	Ushers, lobby attendants, and ticket takers	\$15,300	\$7.35	\$7.18	6.32 - 8.28
39-3091	Amusement and recreation attendants	\$16,510	\$7.94	\$7.65	6.86 - 8.44
39-3092	Costume attendants	\$20,150	\$9.69	\$8.80	7.4 - 11.73
39-3093	Locker room, coatroom, and dressing room attendants	\$17,760	\$8.54	\$8.20	7.22 - 9.6
39-3199	All other gaming workers	\$21,000	\$10.10	\$9.47	7.96 - 11.12
39-6011	Baggage porters and bellhops	\$18,360	\$8.83	\$8.22	6.71 - 10.23
39-6012	Concierges	\$22,060	\$10.60	\$9.94	8.52 - 11.28

SOC Code	Occupational Title	Annualized Wage	Hourly wage		
			Average	Median	Range
39-6021	Tour guides and escorts	\$18,420	\$8.86	\$8.61	6.68 - 10.91
39-6022	Travel guides	\$25,810	\$12.41	\$11.61	9.82 - 13.05
39-6032	Transportation attendants, except flight attendants and baggage porters	\$16,270	\$7.82	\$7.54	6.56 - 9.08
39-9031	Fitness trainers and aerobics instructors	\$21,890	\$10.52	\$8.97	7.59 - 11.84
39-9032	Recreation workers	\$20,440	\$9.83	\$8.79	7.27 - 11.15
39-9099	Personal care and service workers, all other	\$21,030	\$10.11	\$9.10	7.87 - 11.86
41-1011	First-line supervisors/managers of retail sales workers	\$37,180	\$17.87	\$15.49	11.74 - 20.67
41-2011	Cashiers	\$16,580	\$7.97	\$7.80	6.81 - 8.83
41-2012	Gaming change persons and booth cashiers	\$22,120	\$10.63	\$10.71	8.47 - 12.96
41-2031	Retail salespersons	\$22,200	\$10.68	\$8.66	7.34 - 11.56
41-3041	Travel agents	\$27,750	\$13.34	\$12.79	10.37 - 15.26
43-3041	Gaming cage workers	\$23,720	\$11.40	\$11.66	9.83 - 13.12
43-4081	Hotel, motel, and resort desk clerks	\$17,650	\$8.48	\$8.34	7.54 - 9.33
43-4181	Reservation and transportation ticket agents and travel clerks	\$24,950	\$12.00	\$11.09	9.42 - 14.15
45-1011	First-line supervisors/managers of farming, fishing, and forestry workers	\$39,750	\$19.11	\$19.26	15.63 - 22.22
47-2031	Carpenters	\$38,150	\$18.34	\$17.20	13.72 - 23.82
49-2091	Avionics technicians	\$42,250	\$20.31	\$20.19	18.12 - 22.58
49-3031	Bus and truck mechanics and diesel engine specialists	\$35,940	\$17.28	\$16.92	14.04 - 20.38
49-3051	Motorboat mechanics	\$28,480	\$13.69	\$13.63	11.47 - 16.12
49-3092	Recreational vehicle service technicians	\$27,460	\$13.20	\$13.05	11.03 - 15.56
49-9091	Coin, vending, and amusement machine servicers and repairers	\$28,700	\$13.80	\$13.38	10.47 - 17.13
51-3011	Bakers	\$21,280	\$10.23	\$9.50	8.21 - 11.92
53-2012	Commercial pilots	\$45,060	na	na	na
53-3041	Taxi drivers and chauffeurs	\$19,460	\$9.36	\$8.60	7.55 - 10.3
53-6031	Service station attendants	\$18,860	\$9.07	\$8.90	7.94 - 10.16

- a. These data are not specific to travel and tourism sectors as specified earlier in the report but represent employment characteristics by occupational categories across all sectors of Wisconsin's economy. Their selection for inclusion is ad hoc.
- b. Annual Average Wage: An occupation's average wage is calculated by summing the wages of all employees in the occupation and then dividing by the total number of employees in that occupation. In most cases, the annual wage is equal to the average hourly wage multiplied by 2080.
- c. Median Wage: The median wage represents the 50th percentile of the wage distribution. Half of the employees in the occupation earn less than the median wage, half earn more.