

ECONOMIC INDICATORS

Jobs and Earnings Trends in the City of Cleveland and in Cuyahoga County Cuyahoga County Job Losses 2002-2007 Concentrated Entirely in City of Cleveland But, Most Cuyahoga County Job Losses 2007-2010 Concentrated in the Suburbs 2007-2009 USA Recession Completely Changes Geographic Patterns of Local Job Loss

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Summary

The lengthy 2000s recession has been extraordinarily damaging in Ohio and within Cuyahoga County. Between 2000 and 2010 the county lost 132,762 jobs, which was -16.5% of all jobs in Cuyahoga County. Between 2002 and 2010 the county lost 90,818 jobs, representing -11.9% of all employment within the county. But, between 2002 and 2007 these job losses were concentrated entirely within the city of Cleveland, not within the Cuyahoga County suburbs, where employment continued to grow.

During the eight year period between 2002 and 2007, employment levels actually increased by 0.2% in Cleveland's Cuyahoga County suburbs from an increase of 1,123 jobs. During the same five year period, employment levels declined by -9.3% in the city of Cleveland from a loss of -26,650 jobs while employment growth simultaneously took place in the suburbs. Thus, between 2002-2007, *all* of Cuyahoga County's net job losses took place within the city of Cleveland. **That situation completely reversed itself between 2007-2010.** Between 2007-2010, Cuyahoga County's suburbs lost -48,035 jobs as a result of the very deep national 2007-2009 recession for a loss of -10.1% of local suburban employment, while the city of Cleveland lost 17,256 jobs during the same recent three year period, a loss of -6.6% of total employment within the city of Cleveland. **It is therefore clear that the suburbs in Cuyahoga County largely escaped the impact of the 2000s recession for five years, while the city of Cleveland accounted for *all* of the damaging net job losses within Cuyahoga County during the 2002-2007 recession years in the local labor market. But, most Cuyahoga County net job losses during the 2007-2010 period were suffered in the suburbs, completely reversing the pattern seen during the prior five years. So, as a result of these very different patterns early and late in the decade, during the eight year period between 2002-2010, most Cuyahoga County job losses took place within firms located in the suburbs.**

Another pattern is clearly evident in the 2002-2010 data in both Cleveland and its Cuyahoga County suburbs. The average earnings of a surviving job in Cuyahoga County increased between 2002 and 2010 in both the Cuyahoga County suburbs and in the city of Cleveland, despite job losses in Cuyahoga County as a whole, both within the city of Cleveland and in the suburbs. **Therefore, the impact of the loss of -15.3% of Cuyahoga County's jobs between 2002 and 2010 fell entirely on job losers. Their earnings fell to zero, while the average job earnings of those workers still holding jobs increased in both the city of Cleveland and in its Cuyahoga County suburbs. That pattern increased the already high level of economic inequality within Cuyahoga County.** But, between 2007 and 2010, a completely different pattern emerged. The average earnings of a surviving job declined sharply in both Cleveland and in its Cuyahoga County suburbs during the most recent

three year period, as the total number of jobs declined in both the city and in the suburbs. The -12.3% decline in suburban average wages was a faster decline than the simultaneous -3.8% decline in Cleveland average wages between 2007 and 2010.

As a result, between 2002 and 2010, average job wages actually increased in the city of Cleveland by 2.3%, while they simultaneously increased by 3.7% in the suburbs. So, in both the city and in the suburbs, over the long run during the eight year period the impact of the 2000s recession fell on job losers whose incomes fell to zero, while in both the city of Cleveland and in the suburbs, average paychecks actually grew among surviving jobs, while the city of Cleveland lost -43,906 jobs and the suburbs lost -46,912 jobs where workers saw their earnings plunge to zero.

Overall, the catastrophic eight year loss of -43,906 jobs in Cuyahoga County between 2002 and 2010 created immense damage. But, the pattern of those job losses varied considerably between the 2002-2007 period when the net losses were concentrated entirely in Cleveland and the 2007-2010 period when most of the net losses took place in the suburbs. The data do not include an additional -55,132 lost jobs in Cuyahoga County between 2000-2002, since city-suburban breakdowns are not currently available for those two years.

The resulting massive loss in annual aggregate real paycheck earnings between 2002 and 2009 in Cuyahoga County was a massive -\$2.33 billion, a loss of -8.4% of all Cuyahoga County earnings. The quarterly loss was \$776.4 million in total earnings.

More positive news on job growth was evident in certain industries, and that positive news differed considerably between the city of Cleveland and the suburbs. Cleveland experienced employment growth exceeding 20% between 2002 and 2009 in Real Estate, Rental, and Leasing, Educational Services, and Health Care and Social Assistance. The suburbs measured job growth exceeding 20% during the same period of time in Federal Government and Management of Companies and Enterprises. Employment grew briskly during the seven year period in both the city of Cleveland and in the suburbs in Educational Services as a result of public policy changes in Ohio that cut Local Government funding to public school districts and increased funding to charter schools in Educational Services. Simultaneously, high wage jobs in Management of Companies and Enterprises increased nicely in both the city of Cleveland and in the suburbs. The city of Cleveland experienced robust growth in Health Care and Social Assistance employment.

Since the breakdown of job growth in Cleveland and in the suburbs is always subject to delay of more than one year behind real time, these new findings do not reflect the trough low point of the 2000s recession that appears to have been reached during the third quarter of 2010. Growth since the third quarter of 2010 has been real, but it has been extremely slow on a nationwide basis. Renewed losses of employment in April 2011 and in subsequent months had an unknown impact on the distribution of employment between Cleveland and its Cuyahoga County suburbs.

Definitions

Employment is measured in this report by the Quarterly Census of Employment and Wages complete count of jobs and earnings released by the Ohio Department of Jobs and Family Services under contract to the United States Department of Labor. Formerly known as the ES-202 series, these data

are extracted from the unemployment insurance database. Although they are subject to a real time delay of at least one year prior to their release in this context, they represent by far the most comprehensive and precise count of employment in all Ohio private sector firms. As part of a special project at ODJFS, the Cuyahoga County data on jobs have been geocoded since 2002 so that they are subdivided between the jobs that are located in the city of Cleveland and the jobs that are located in suburban municipalities within Cuyahoga County. This report examines the trend in Cuyahoga County employment between the first quarter of 2002 and the first quarter of 2010 in both Cleveland and the suburbs of Cuyahoga County. The geocoding for Cleveland is done on a somewhat delayed basis for the first quarter in each year.

Aggregate paycheck earnings are also from the QCEW complete count of earnings. In this report they are presented in real inflation-adjusted March 2010 dollars for the first quarter. The inflation adjustment is from the Consumer Price Index.

The National Bureau of Economic Research has determined that the United States economy was in recession between March 2001 and November 2001. Thus, at the national level the duration of the 2000s recession was quite brief. But, the state of Ohio sustained employment losses associated with the 2000s recession as early as the fourth quarter of 2000. Those continual employment losses continued through 2010. The National Bureau of Economic Research has determined that a second United States recession began in December 2007 and continued until June 2009. In the labor market of Cuyahoga County and Ohio the duration of the 2000s recession is approaching ten years, as measured by continual declines in total employment within both the county and the state between 2000 and the first quarter of 2010. The 2001-2007 national recovery bypassed Ohio's labor market. Then, the 2007-2009 recession made matters worse, as jobs Ohio jobs were lost in large numbers, and as an Ohio labor market recovery failed to materialize for the first year following the end of the national recession.

Employment losses in Ohio have of course been associated with payroll earnings losses for workers. This report measures the size of both employment losses and earnings losses during the lengthy 2000s recession in Cuyahoga County, with the data broken down between Cleveland and its Cuyahoga County suburbs. **The data omit job losses that took place during 2000 and 2001 and after the first quarter of 2010, so the data substantially underestimate losses in both employment and earnings within Cuyahoga County during the lengthy local 2000s recession.** Nevertheless, the data provide a valuable measure of economic trends in the city of Cleveland and in the suburbs of Cuyahoga County during the most recent eight year period for which data are available.

It is important to note that the geography of jobs in this report is based on the location of the job, regardless of whether the jobholder lives in that jurisdiction. Large numbers of jobs located in the city of Cleveland are held by residents of the Cuyahoga County suburbs, or even by residents of other counties. The same holds true for jobs located in the suburbs of Cuyahoga County, which are held in significant numbers by residents of the city of Cleveland or residents of other counties.

Important Technical Definition/Note

In a very unusual situation, the Labor Market Information Division of the Ohio Department of Jobs and Family Services reports that a large firm operating largely within the city of Cleveland reclassified two of its divisions from Finance and Insurance to Management of Companies and enterprises between

the fourth quarter of 2006 and the first quarter of 2007. ODJFS reports this unusual change by saying, “The drop of approximately 4,000 employees in the Finance and Insurance Sector (NAICS 52) between fourth quarter 2006 and first quarter 2007 is primarily due to non-economic code changes. Two units constitute most of the decline. These two units were recoded by Quarterly Census Employment and Wages (QCEW) from NAICS 52 into a different 2-digit NAICS sector “based upon information supplied by the employer.” The name of the firm where the recoding took place is confidential by law.

Therefore, the employment and earnings counts in this report overestimate declines in Finance and Insurance, but they overestimate growth in Management of Companies and Enterprises. This problem results entirely from a recoding of two units of a firm in Cleveland that formerly was classified in Finance and Insurance, but is now classified in Management of Companies and Enterprises. The technicality only applies to the 2006-2007 period. The data between 2007-2009 are not impacted by this coding change.

The Data

Employment Losses in Cuyahoga County

Cuyahoga County lost -11.9% of its jobs between the first quarter of 2002 and the first quarter of 2010. The employment loss within the county was -90,818 jobs during the eight year period. In terms of total jobs lost, Manufacturing accounted for 35% of the net job loss within the county with a large decline of -31,755 Manufacturing jobs. Retail Trade suffered a decline of -16,559 jobs while Finance and Insurance lost -13,530 jobs. A small portion of that loss in Finance and Insurance was caused by a coding change at ODJFS.

These losses exclude an additional -42,312 jobs that Cuyahoga County lost between the first quarters of 2000 and 2002. They are therefore a substantial underestimate of the 2000-2010 employment losses in both Cleveland and the Cuyahoga County suburbs between 2000 and 2010. That ten year employment loss was a massive -133,754 jobs, or -16.9% of the employment that Cuyahoga County had a decade ago in 2000.

The largest percentage loss in Cuyahoga County employment during the seven year period among industries with at least 500 jobs was in Utilities with -37.9% growth. Other double digit percentage losses were suffered by Information at -32.9%, Manufacturing at -32.4%, Construction at -29.4%, Finance and Insurance at -24.8%, Other Services Except Public Administration at -22.9%, Retail Trade at -21.4%, Wholesale Trade at -17.8%, Administrative and Waste Services at -15.8%, Real Estate, Rental and Leasing at -13.2%, State Government at -12.5%, Arts, Entertainment, and Recreation with a -11.8% loss, and Professional and Technical Services at -10.7% (see Table Three). These data unfortunately omit jobs lost in both Cleveland and the suburbs prior to the first quarter of 2002 and after the first quarter of 2000. That 2000-2002 job loss was 42,312 jobs in Cuyahoga County, which was a two year loss of -5.4%. Data are not available for the city of Cleveland and the suburbs during the two years between 2000-2002. But, it is clear that the 2000s recession was extraordinarily deep and broad throughout the Cuyahoga County economy.

All Industries did not lose employment in Cuyahoga County between 2002 and 2009. Substantial gains exceeding 2,000 jobs were measured within Health Care and Social Assistance, Management of Companies and Enterprises, Federal Government, and Educational Services. Even as total employment fell sharply in Cuyahoga County, those industries registered healthy job growth within the county.

Industries with Cuyahoga County Job Increase 1Q 2002-1Q 2010
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q JOBS 2002</u>	<u>1Q JOBS 2007</u>	<u>1Q JOBS 2010</u>	<u>07-10 JOBS # INCR</u>	<u>07-10 JOBS % INCR</u>	<u>02-10 JOBS # INCR</u>	<u>02-10 JOBS % INCR</u>
Educational services	17,224	19,485	21,385	1,900	9.8%	4,161	24.2%
Mgt companies enterprises	13,639	18,013	16,814	-1,199	-6.7%	3,175	23.3%
Health care and social asst	103,077	111,118	119,166	8,048	7.2%	16,089	15.6%
Federal Government	16,330	16,043	16,955	912	5.7%	625	3.8%
Mining	291	301	295	-6	-2.0%	4	1.4%
TOTAL EMPLOYMENT	763,764	738,237	672,946	-65,291	-8.8%	-90,818	-11.9%

The robust growth in Educational Services was somewhat misleading, since it was driven by a large expansion of charter schools funded by the state of Ohio by concurrent cuts to funding of public school districts in Local Government. The 23% growth in Management of Companies and Enterprises and the 4% growth in Federal Government employment were welcome stories of employment expansion during a deep recession. The 15.6% growth in Health Care and Social Assistance was also a noteworthy expansion during a very difficult economic period. Other Ohio counties also experienced robust growth in Health Care and Social Assistance during this eight year period.

Employment Losses in the City of Cleveland

The city of Cleveland lost -15.3% of its jobs between the first quarter of 2002 and the first quarter of 2010. The city lost -43,906 jobs during this eight year period. Most of those jobs were lost between 2002 and 2007, but there were additional losses between 2007 and 2010 (see Table One). The largest loss of jobs in the City of Cleveland among all industries was in Manufacturing, where Cleveland lost -12,354 jobs for a discouragingly mammoth decline of -38.6%. Finance and Insurance sustained the second largest loss of -9,676 jobs, although a small portion of that loss was a result of the aforementioned coding change at one firm by ODJFS. The percentage loss in Finance and Insurance of -45.7% was the most rapid decline of any Cleveland private sector industry. Federal Government also suffered an astonishingly large employment loss in Cleveland of -3,757 jobs for a decline of -45.7%. Other large losses in the city of Cleveland exceeding -1,000 jobs were found in Local Government, Professional and Technical Services, Administrative and Waste Services, Retail Trade, Information, Other Services except Public Administration, Wholesale Trade, Construction, and Accommodation and Food Services. **Table One** indicates that the large Finance and Insurance job losses began in Cleveland during 2005.

In percentage terms, Federal Government, Finance and Insurance, Information, and Manufacturing lost a highly alarming more than 40% of their jobs formerly located in the city of Cleveland between 2002

and 2010. The 2000s recession had a very deep and widespread negative effect on employment at firms in numerous industries located within the city of Cleveland.

There were some exceptions to this carnage in certain industries. Three Cleveland industries experienced double digit percentage employment growth between 2002 and 2009, including Real Estate, Rental, and Leasing, Educational Services, and Health Care and Social Assistance. That growth took place while employment losses were widespread and deep in other industries located within the city of Cleveland. A large expansion of charter schools in Cleveland accounts for much of the growth in Educational Services employment.

Industries with City of Cleveland Job Increase 1Q 2002-1Q 2010

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	1Q	1Q	1Q	07-10	07-10	02-10	02-10
	JOBS	JOBS	JOBS	JOBS	JOBS	JOBS	JOBS
	2002	2007	2010	#	%	#	%
				<u>INCR</u>	<u>INCR</u>	<u>INCR</u>	<u>INCR</u>
Real estate rental leasing	2,696	3,218	3,447	229	7.1%	751	27.9%
Educational services	9,960	11,527	12,688	1,161	10.1%	2,728	27.4%
Health care social assistance	46,598	48,989	55,955	6,966	14.2%	9,357	20.1%
State Government	3,940	3,540	4,456	916	25.9%	516	13.1%
Agr/forestry/fishing/hunting	21	26	23	-3	-11.5%	2	9.5%
Mining	231	206	239	33	16.0%	8	3.5%
CLEVELAND EMPLOYMENT	287,608	260,958	243,702	17,256	-6.6%	-43,906	-15.3%

Employment Losses in Cuyahoga County Suburbs

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The suburban communities of Cuyahoga County experienced slow 0.2% growth in their number of jobs between the first quarter of 2002 and the first quarter of 2007. They gained 1,123 jobs during this five year period. These net employment gains were registered during the same time period when the city of Cleveland lost -26,650 jobs. But, this favorable period of suburban job growth contrasts sharply with the much larger job loss of -48,035 jobs that the Cuyahoga County suburbs suffered during the most recent three year 2007-2010 period. **This concentration of Cuyahoga County's entire net loss of employment between 2002 and 2007 entirely within the city of Cleveland is a stunning development that has received insufficient attention. But, the sudden turnaround to very large suburban job losses between 2007 and 2009 was equally stunning.** During the recovery from the 2000-2002 national recession, the suburbs experienced job growth. However, once the 2007-2009 national recession started, the suburbs lost all of the gains that they had experienced during the national economic recovery and an enormous number of recent additional suburban job losses.

Table Two finds that as was the case in the city of Cleveland, the largest job loss by industry between 2002 and 2010 in the suburbs was in Manufacturing. Most of the Manufacturing job losses during this seven year period were in the suburbs, not in Cleveland. The -19,401 Manufacturing jobs lost in the suburbs exceeded the very large loss of -12,354 Manufacturing jobs in the city of Cleveland. Despite

that large suburban job loss during the 2000s recession, 70.4% of all Manufacturing jobs in Cuyahoga County are currently located in the suburbs. That represents an increase from the 67.4% figure that the suburbs accounted for in 2002, given a faster rate of Manufacturing loss in the city of Cleveland during the 2000s recession. The suburbs lost -29.4% of their Manufacturing jobs between 2002 and 2010, while the city of Cleveland lost -38.6% of its manufacturing jobs during that portion of the 2000s recession.

Despite the general employment increase in Cuyahoga County's suburbs 2002-2007, the suburbs lost more than 10% of their jobs in Utilities, Information, Real Estate Rental and Leasing, Retail Trade, and Other Services except Public Administration. Those losses were in addition to the large suburban losses in Manufacturing. The Retail Trade job losses in the suburbs were -9,795 jobs through 2007, a particularly sharp decline of -12.7%. **Table Two** documents that the suburbs lost more than 12% of their employment in Finance and Insurance during both the five year 2002-2007 period and the most recent three year 2007-2010 period. Suburban employment patterns in both Retail Trade and Finance and Insurance are heavily dependent on simultaneous employment patterns in the city of Cleveland.

Then, between 2007-2010 the suburbs suffered very substantial job losses. While the city of Cleveland lost -17,256 jobs between 2007-2010, the suburbs lost a much larger -46,912 job during the same three year period. As a result, during the eight year 2002-2010 period the suburbs lost -46,912 jobs and the city of Cleveland lost -43,906 jobs. **During just the last three years, the pattern of concentrated job losses in the city of Cleveland was replaced by a situation where most of the jobs lost in Cuyahoga County as a result of the 2000s recession were in the suburbs, and not in the city of Cleveland.**

It is not widely understood that almost two-thirds of Cuyahoga County's jobs are provided by firms located in the suburbs. The percentage of all Cuyahoga County jobs that are located in the suburbs rose from 62.3% in 2002 to 64.7% in 2007 as most Cuyahoga County job losses were concentrated in the city of Cleveland. But, the two year period between 2007-2009 reversed that trend, with most of the two year job losses located in the suburbs. As a result, the percentage of Cuyahoga County jobs located in the suburbs fell to 63.8% in 2010, a figure that is very similar to the pattern that was evident in 2002.

As was the case in the city of Cleveland, four large industries posted double digit percentage employment growth in the suburbs, even while the suburban employment levels were falling sharply overall as a result of the 2000s recession. Those industries included Federal Government, Management of Companies and Enterprises, Federal Government, Educational Services, and Health Care and Social Assistance.

Industries with Cuyahoga County Suburbs Job Increase 1Q 2002-2010
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q JOBS 2002</u>	<u>1Q JOBS 2007</u>	<u>1Q JOBS 2010</u>	<u>07-10 JOBS # INCR</u>	<u>07-10 JOBS % INCR</u>	<u>02-10 JOBS # INCR</u>	<u>02-10 JOBS % INCR</u>
Federal Government	8,117	10,830	12,499	1,669	15.4%	4,382	54.0%
Mgt companies enterprises	7,221	11,037	10,988	-49	-0.4%	3,767	52.2%
Educational services	7,264	7,958	8,697	739	9.3%	1,433	19.7%
Health care and social asst	56,479	62,129	63,211	1,082	1.7%	6,732	11.9%
Local Government	37,294	37,325	38,754	1,429	3.8%	1,460	3.9%
SUBURBS EMPLOYMENT	476,156	477,279	429,244	48,035	-10.1%	-46,912	-9.9%

The employment trend in Educational Services was distorted in both the city of Cleveland and in the suburbs by a shift in state funding for education away from local government school districts to charter schools. In Health Care and Social Assistance, there was 20.1% employment growth between 2002-2010 in the city of Cleveland, and there was simultaneous 11.9% growth in the suburbs.

Industries experiencing growth were otherwise quite different in the city of Cleveland and in the suburbs. In Cleveland there was robust 27.9% growth in Real Estate, Rental, and Leasing, while there was a simultaneous large decline of -23.9% in the suburbs in Real Estate employment. At the same time there was a very large increase in Federal Government employment of 54% in the suburbs but a very large decline in Federal Government employment of -45.7% in the city of Cleveland between 2002-2010.

Aggregate Real Paycheck Earnings Trends in Cuyahoga County

Aggregate real paycheck earnings *increased* by 2.9% in Cuyahoga County between the first quarter of 2002 and the first quarter of 2007, despite a simultaneous 3.3% *decline* in Cuyahoga County employment. The county's quarterly aggregate real earnings grew by \$253.8 million during this five year period. On an annualized basis that increase was \$1.02 billion. **Table Four** outlines this growth in detail by industry. Most of the increase was accounted for by one industry: Management of Companies and Enterprises. The increase came despite a loss of \$151.4 million in quarterly Manufacturing earnings. Construction earnings also declined by \$12.4 million per quarter. Both Real Estate, Rental, and Leasing and Finance and Insurance experienced double digit percentage increases in aggregate earnings between 2002 and 2007. So, a large decline in blue collar earnings was overcome on a countywide basis by a large increase in aggregate real earnings in a variety of management firms in services. Some of the earnings increase in Management and Companies and enterprises can be attributed to a technical coding change by ODJFS for two units of one Cleveland firm.

But, an entirely different pattern is evident during the 2007-2010 three year period. Quarterly aggregate real earnings in Cuyahoga County fell by a mammoth 18.4% between 2007 and 2010. The three year quarterly loss was -\$457.3 million, which annualized is a gigantic loss of -\$1.83 billion.

That massive recent three year decline completely wiped out the prior 2000-2007 earnings gain within the county. The largest three year earnings declines among industries were a staggering -34.5% decline in Retail Trade, a -31.5% decline in Administrative and Waste Services. During the last two years, Manufacturing real earnings fell by -28.6. Very large declines were also suffered in Construction with a loss of -28.3%, Finance and Insurance at -27.9%, and Transportation and Warehousing at -25.9%.

As a result, Cuyahoga County's 2002-2010 growth in aggregate real earnings fell to a -8.4% decline. That decline was caused by the mammoth -18.4% decline between 2007-2010. Only three Industries escaped the massive three year 2007-2010 earnings decline within the county. Aggregate earnings grew in Mining by 9.5% as a result of a settlement of a labor dispute. Earnings in Health Care and Social Assistance grew by 3.7%. Earnings in Educational Services grew by a healthy 1.6%, largely as a result of a continuing state policy change that transferred funding from school districts in Local Government to charter schools in Educational Services. Health Care and Social Assistance aggregate real earnings grew by 3.7% during the most recent three year period, but that growth was slower than the simultaneous two year employment growth of 7.2% in Health Services. As a result, mean earnings of a job fell in Health Services during the most recent three year period in Cuyahoga County, despite the healthy job growth in that industry.

Industries with Cuyahoga County Aggregate Real Earnings Growth 1Q 2002-2010

Thousands of March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	1Q	1Q	1Q	07-10	07-10	02-10	02-10
	EARN	EARN	EARN	EARN	EARN	EARN	EARN
	2002	2007	2010	\$	%	#	%
				INCR	INCR	INCR	INCR
Mgt companies enterprises	\$288,360	\$480,160	\$388,706	\$91,454	-19.0%	\$100,346	34.8%
Educational services	\$169,944	\$180,745	\$183,592	\$2,847	1.6%	\$13,648	8.0%
Health care social assistance	\$1,097,241	\$1,158,146	\$1,201,369	\$43,223	3.7%	\$104,128	9.5%
CUYAHOGA TOTAL	\$1,555,546	\$1,819,051	\$1,773,667	\$45,384	-2.5%	\$218,121	14.0%

Aggregate Real Paycheck Earnings Losses in the city of Cleveland

The city of Cleveland lost 3.4% of its aggregate real paycheck earnings between the first quarter of 2002 and the first quarter of 2007. The city lost -\$122.8 million in quarterly earnings during this five year period. On an annualized basis that loss was -\$491.3 million. That situation was made far worse by an enormous additional three year 2007-2010 quarterly -\$457.4 million earnings loss in the city of Cleveland. This increased the 2002-2010 quarterly earnings loss in Cleveland to -\$582.98 million. On an annualized basis, that eight year loss has been -\$1.83 billion, or -15.7% of all earnings that firms generated in the city of Cleveland in 2002.

The largest city of Cleveland earnings losses were in Administrative and Waste Services, Finance and Insurance, and Manufacturing, where earnings fell between 2002-2010 by more than -25%. Cleveland

Retail Trade earnings fell by a large -24.6% during the eight year period. **Table Four** tabulates these disturbing large earnings losses.

At the same time, Cleveland did have four industries where aggregate real earnings increased between 2002 and 2010. Those growing industries included Real Estate, Rental, and Leasing, Management of Companies and Enterprises, Health Care and Social Assistance, as well as Educational Services. Some of the large increase in Management of Companies and Enterprises is misleading, since it resulted from a coding change by a large Cleveland firm that reported to ODJFS that it had reclassified its industry. The growth in Educational Services resulted from a funding policy shift by the state government in Columbus.

Cleveland Industries with Aggregate Real Earnings Growth 1Q 2002-2010
Thousands of March 2010 Dollars, Consumer Price Index Deflator
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u>	<u>1Q</u>	<u>1Q</u>	<u>07-10</u>	<u>07-10</u>	<u>02-10</u>	<u>02-10</u>
	<u>EARN</u>	<u>EARN</u>	<u>EARN</u>	<u>EARN</u>	<u>EARN</u>	<u>EARN</u>	<u>EARN</u>
	<u>2002</u>	<u>2007</u>	<u>2010</u>	<u>\$</u>	<u>%</u>	<u>#</u>	<u>%</u>
				<u>INCR</u>	<u>INCR</u>	<u>INCR</u>	<u>INCR</u>
Real estate rental leasing	\$24,519	\$38,568	\$32,437	-\$6,131	-15.9%	\$7,918	32.3%
Mgt companies enterprises	\$113,752	\$192,004	\$145,446	-\$46,558	-24.2%	\$31,694	27.9%
Health care social assistance	\$541,335	\$575,927	\$665,915	\$89,988	15.6%	\$124,580	23.0%
Educational services	\$112,603	\$111,413	\$120,883	\$9,470	8.5%	\$8,280	7.4%
CLEVELAND TOTAL	\$3,725,055	\$3,599,473	\$3,142,080	\$457,393	-12.7%	-\$582,975	-15.7%

Aggregate Real Paycheck Earnings Losses in Cuyahoga County Suburbs

Aggregate real paycheck earnings in the Cuyahoga County Suburbs increased by 7.3% between the first quarter of 2002 and the first quarter of 2007. The suburbs gained \$376.7 million in quarterly earnings during this five year period. On an annualized basis that suburban earnings increase was \$1.51 billion. The suburban earnings increase took place even while aggregate real earnings were declining at firms located in the city of Cleveland.

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But, that situation changed entirely during the two year 2007-2009 period. Aggregate real earnings fell by a very large -20.8% between 2007 and 2010 in Cuyahoga County's suburbs. The quarterly decline was -\$1.2 billion, which annualized was a massive loss of -\$4.89 billion. That gigantic decline completely wiped out the 2002-2007 increases. Thus, during the seven year 2000-2009 period, **Table Five** finds that aggregate real earnings paid by firms located in the Cuyahoga County suburbs fell by a disappointing and highly alarming -15.1%. The quarterly earnings loss in the suburbs between 2002-2010 was -\$816.8 million. On an annualized basis that large loss was -\$3.27 billion in the suburbs alone during the eight year period. The sharpest declines came in four industries where earnings fell by -33% or more. Losing more than a quarter of their aggregate earnings in the suburbs were Utilities, Information, Retail Trade, and Manufacturing.

Despite these horrible declines across many large industries, there were four industries that posted double digit percentage increases in aggregate real earnings in the suburbs between 2002 and 2009.

Cuyahoga County Suburbs Industries with Aggregate Real Earnings Growth, 1Q 2002-2009

Thousands of March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	1Q	1Q	1Q	07-10	07-10	02-10	02-10
	EARN	EARN	EARN	EARN	EARN	EARN	EARN
	2002	2007	2010	\$	%	#	%
				INCR	INCR	INCR	INCR
Mgt of companies/enterprise	\$171,988	\$283,733	\$243,260	-\$40,473	-14.3%	\$71,272	41.4%
Mining	\$1,239	\$1,734	\$1,536	-\$198	-11.4%	\$297	23.9%
Educational services	\$54,747	\$66,766	\$62,709	-\$4,057	-6.1%	\$7,962	14.5%
Federal Government	\$168,422	\$207,309	\$190,484	-\$16,825	-8.1%	\$22,062	13.1%
Professional and tech serv	\$353,912	\$404,642	\$357,955	-\$46,687	-11.5%	\$4,043	1.1%
Local Government	\$412,815	\$428,827	\$414,298	-\$14,529	-3.4%	\$1,483	0.4%
SUBURBS TOTAL	\$5,420,529	\$5,814,537	\$4,603,699	-\$1,210,838	-20.8%	-\$816,830	-15.1%

The total annualized earnings loss in Cuyahoga County as a result of the 2000s recession was massive, both during the eight year 2002-2010 period and during the last three years in 2007-2010. Despite the 2002-2007 aggregate real earnings gains within the county, the eight year earnings loss is -\$5.6 billion on an annualized basis. This is a truly alarming loss.

Annualized Aggregate Real Earnings Losses, Cuyahoga County, Cleveland, and Suburbs, 1Q 2002-1Q 2010

Billions of March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>JURISDICTION</u>	07-10	07-10	02-10	02-10
	EARN	EARN	EARN	EARN
	\$ BILLION	%	\$ BILLION	%
	INCR	INCR	INCR	INCR
Cleveland	-\$1.83	-12.7%	-\$2.33	-15.7%
Suburbs	-\$4.84	-20.8%	-\$3.27	-15.1%
Cuyahoga County	-\$6.67	-18.4%	-\$5.60	-8.4%

Growth Trend in the Mean Earnings of a Job in Cuyahoga County

Since aggregate real paycheck earnings increased by 2.9% within the county between the first quarter of 2002 and the first quarter of 2007, while total employment fell by 3.3% during the same period of time, the mean earnings of a surviving job actually increased in Cuyahoga County during the five year period. This trend was heavily concentrated among Finance and Insurance and Management of Companies and Enterprises, but it was also widespread in other Cuyahoga County industries.

Then, between 2007 and 2010 that situation reversed itself entirely. During this most recent three year period, the mean earnings of a Cuyahoga County job fell sharply by -12.3%. As a result, the five year

2002-2007 increases in Cuyahoga County average earnings nearly disappeared in only three years. Over the eight year 2002-2010 period, the real mean earnings of a Cuyahoga County job increased very little, with a small increase of 3.7%. For jobs located in the city of Cleveland, mean earnings increased by 2.5% during the seven year 2002-2010 period. But, for jobs located in the suburbs, the mean earnings of a job increased by 3.7% during the same eight years. The trend in mean earnings also was highly variable by industry. **Table Nine** measures the seven year trend in mean earnings of a Cuyahoga County job by industry. **Table Seven** provides the same trend for jobs located in the city of Cleveland, while **Table Eight** measures the average earnings trend for jobs located in the suburbs.

In Cuyahoga County as a whole, mean job earnings rose sharply by double digit percentage levels between 2002 and 2010 in five industries. Finance and Insurance average job earnings soared by 22.3% in eight years. During the same period, Utilities mean earnings soared by 18%, and Real Estate, Rental, and Leasing average job earnings grew at a healthy 14% pace. That growth took place while average job earnings were largely unchanged or actually declining in other Cuyahoga County industries.

At the other end of the scale, three large Cuyahoga County industries suffered double digit declines in their mean job earnings between 2002 and 2010. The largest decline was in Mining, which fell at a rate of -15.6%. Other industries with double digit declines in average job earnings included Retail Trade with a loss of -13.9% and Federal Government with a decline of -11.1%. Average Manufacturing wages fell at a slower pace of -4.2%.

As was true for trends in employment and earnings in Cuyahoga County, the patterns in average job earnings were considerably different during the last three years in 2007-2010 than they were during the 2002-2007 period. Mean earnings actually increased in Cuyahoga County between 2002 and 2007, even as the county's employment level declined. But, coincident with the national 2007-2009 recession, mean earnings fell by a large 12.3% in Cuyahoga County during the last three years. Retail Trade suffered the largest three year decline at -23.2%, but Manufacturing also suffered a very substantial three year -8.4% decline. Nearly all industries in Cuyahoga County suffered declines in average wages paid between 2007 and 2010. The impact of the deep national recession at the local level involved losses in employment and earnings, but average wages also fell sharply as a result of the national recession during the last three years.

Growth Trend in the Mean Earnings of a Job in the City of Cleveland

Since aggregate real paycheck earnings declined by only 3.4% between the first quarter of 2002 and the first quarter of 2007, while total employment decreased by a larger 9.3% during the same period of time, the mean earnings of a surviving job actually increased by 6.5% in the city of Cleveland during that five year period. The growing mean earnings were particularly concentrated in firms within Management of Companies and Enterprises, Finance and Insurance, Real Estate and Rental and Leasing, as well as Administrative and Waste Services.

Exceptions to this pattern of growing 2002-2007 mean earnings of a Cleveland job were evident with falling average earnings in a variety of industries that generate blue collar employment such as Mining, Construction Transportation and Warehousing, as well as Manufacturing. Average job earnings also

fell in Cleveland firms classified within Arts, Entertainment, and Recreation, Local Government, and Educational Services.

But, **Table Seven** finds that these patterns changed drastically for jobs located within the city of Cleveland between 2007 and 2010, just as they did within Cuyahoga County as a whole during the 2007-2009 national recession. Very large double digit declines in the city of Cleveland were evident in several industries, including Administrative and Waste Services, Real Estate, Rental and Leasing, Retail Trade, Management of Companies and Enterprises, and Wholesale Trade. Average Cleveland Manufacturing earnings fell at a smaller -4.0% rate.

Only three major industries experienced large gains in mean job earnings at firms located in the city of Cleveland during the two year 2007-2009 period. Those three industries were Arts, Entertainment, and Recreation, Mining, and Utilities. The Arts, Entertainment, and Recreation growth in average earnings coincided with a substantial new subsidy for the industry financed by a new Cuyahoga County tax. The growth in Mining coincided with settlement of a major labor dispute that had depressed wages in the industry. The growth in mean earnings within in Arts, Entertainment, and Recreation in Cleveland contrasted with declines in mean earnings within that industry in suburban Cuyahoga County firms.

Following the contradictory patterns between 2002-2007 and 2007-2010, mean earnings of a city of Cleveland job increased by 2.5% during the eight year 2002-2010 period. Substantial eight year double digit increases in mean job earnings resulted for Cleveland jobs within Finance and Insurance, Management of Companies and Enterprises, Utilities, Arts, Entertainment, and Recreation, and Administrative and Waste Services. The rise in inequality of earnings within Cleveland varied considerably between industries in the Cleveland economy.

At the same time, mean earnings fell between 2002-2010 by double digit levels for Cleveland jobs within Agriculture, Forestry, Fishing, and Hunting, Retail Trade, Mining, Educational Services, and Transportation and Warehousing.

The 2007-2010 declines wiped out many of the gains in mean job earnings within Cleveland between 2002-2007. But, for the eight year 2002-2010 period, the average earnings of a Cleveland job within any industry increased by 2.5%, despite the loss of 43,906 Cleveland jobs during those eight years, representing an eight year -15.3% decline in Cleveland employment. City of Cleveland firms actually increased average wages of surviving jobs during the last eight years, even as they cut employment very sharply, and even though that pattern varied greatly by industry. Thus wage inequality growth was primarily caused in Cleveland by the 15% loss of jobs in the city, which caused the earnings of those jobholders to fall to zero.

Growth Trend in the Mean Earnings of a Job in Cuyahoga County Suburbs

Since aggregate real paycheck earnings increased by 7.3% between the first quarter of 2002 and the first quarter of 2007, while total employment grew by only 0.2% during the same period of time, the mean earnings of a job also increased in the Cuyahoga County suburbs during the five year period. As was true in the city of Cleveland, the fastest increases were experienced by workers in financial occupations such as Real Estate Rental and Leasing as well as Finance and Insurance. But, average

earnings of suburban workers in blue collar industries such as Manufacturing and Construction also increased among workers in suburban firms during the five year 2002-2007 period.

But, **Table Eight** finds that these patterns changed drastically for jobs located within the Cuyahoga County suburbs between 2007 and 2010, just as they did within Cuyahoga County as a whole during the 2007-2009 national recession. Very large two year double digit declines in the mean earnings of a job in the suburbs were evident in several industries, including Retail Trade, Arts, Entertainment, and Recreation, Management of Companies and Enterprises, Federal Government, and Manufacturing. Only one major industry experienced large gains in mean job earnings at firms located in the Cuyahoga County suburbs during the two year 2007-2009 period. That industry was Utilities with 12.1% growth during the deep recession in the suburbs. Health Care and Social Assistance average earnings in the suburbs actually fell during the last two years by -2.8%.

Following the contradictory patterns between 2002-2007 and 2007-2010, mean earnings of a job located in the Cuyahoga County suburbs increased by 3.7% during the eight year 2002-2010 period.

Conclusion

The 2000s recession was extremely damaging to firms and workers in Cuyahoga County. But, overwhelmingly, that damage was suffered by firms located within the City of Cleveland between 2002-2007. Firms located in Cleveland lost jobs between 2002 and 2007, even while firms located in the suburbs gained employment. Losses were heavily concentrated within blue collar industries, even while jobs and earnings increased in several financial and health industries.

These findings highlight the difficulties that the city of Cleveland has experienced during the lengthy 2000s recession, particularly during the 2002-2007 period. But, since many workers holding jobs in the city of Cleveland actually live in the suburbs or in other counties, the impact of this Cleveland weakness in suburban and exurban communities was also substantial.

Then, during the 2007-2010 period that coincided with the 2007-2009 national United States recession that was very deep, the regional patterns between the city of Cleveland and the suburban communities of Cuyahoga County changed considerably. Cleveland continued to lose jobs during the last three years with an additional loss of 17,256 jobs, but the suburbs suffered even larger losses of -48,035 jobs during the last three years.

Combining the last three years and the previous five years, Cuyahoga County's suburbs lost 46,912 jobs during the last eight years, while the city of Cleveland lost -43,906 jobs. So, the very large recent three year job losses between 2007-2010 eliminated the five year 2002-2007 finding that all net Cuyahoga County job losses had taken place within the city of Cleveland. During the seven year period between 2002-2010, a majority of the job losses within Cuyahoga County have been suffered by firms located in the suburbs.

But, the net effect of the lengthy 2000s recession has still been a slight increase in the percentage of all Cuyahoga County jobs that are located in the suburbs. That percentage was 62.3% in 2002, and it has increased slightly to 63.8% in 2009.

City of Cleveland and Suburbs % of Jobs, 1Q 2002-1Q 2010

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

LOCATION	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>
% JOBS IN CLEVELAND	37.7%	37.0%	36.7%	36.0%	35.4%	35.3%	36.3%	36.6%	36.2%
% JOBS IN SUBURBS	62.3%	63.0%	63.3%	64.0%	64.6%	64.7%	63.7%	63.4%	63.8%

Another salient finding in these new figures is that the impact of the recession has fallen heavily on job losers, since aggregate real earnings and average earnings of a job actually increased very slightly during the 2000s recession, both in the city of Cleveland and in the suburbs. This phenomenon contributed to growing inequality within Cuyahoga County, as earnings of many average workers grew while earnings of job losers plunged precipitously to zero.

Acknowledgment

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Data Tables

TABLE ONE: City of Cleveland Annual Employment Growth by Industry, 1Q 2002-1Q 2010
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>	<u>07-10</u> <u>JOBS</u> <u>#</u> <u>INCR</u>	<u>07-10</u> <u>JOBS</u> <u>%</u> <u>INCR</u>	<u>02-10</u> <u>JOBS</u> <u>#</u> <u>INCR</u>	<u>02-10</u> <u>JOBS</u> <u>%</u> <u>INCR</u>
Real estate rental leasing	2,696	3,072	3,229	3,273	3,354	3,218	3,789	3,594	3,447	229	7.1%	751	27.9%
Educational services	9,960	10,629	11,195	11,816	11,998	11,527	11,506	12,613	12,688	1,161	10.1%	2,728	27.4%
Health care social assistance	46,598	46,857	45,532	47,024	47,652	48,989	50,954	53,669	55,955	6,966	14.2%	9,357	20.1%
State Government	3,940	3,591	3,541	3,562	3,554	3,540	3,567	3,477	4,456	916	25.9%	516	13.1%
Agr/forestry/fishing/hunting	21	23	22	19	21	26	22	21	23	-3	-11.5%	2	9.5%
Mining	231	172	191	232	245	206	250	244	239	33	16.0%	8	3.5%
Transportation warehousing	4,116	4,340	4,578	4,315	4,649	4,186	4,094	4,033	3,838	-348	-8.3%	-278	-6.8%
Accommodation food services	14,112	13,222	13,241	14,071	14,515	14,205	13,972	13,332	12,999	-1,206	-8.5%	-1,113	-7.9%
Mgt companies enterprises	6,418	6,819	7,084	6,605	6,543	6,976	7,024	6,369	5,826	-1,150	-16.5%	-592	-9.2%
Arts, entertainment, and rec	5,150	4,906	4,520	4,577	4,482	3,143	4,521	4,373	4,338	1,195	38.0%	-812	-15.8%
Utilities	1,042	948	892	865	918	948	995	907	871	-77	-8.1%	-171	-16.4%
Wholesale trade	12,229	11,475	11,312	11,341	11,223	11,716	11,421	10,784	10,217	-1,499	-12.8%	-2,012	-16.5%
Local Government	44,798	43,749	43,188	41,906	39,932	42,359	41,706	41,162	36,903	-5,456	-12.9%	-7,895	-17.6%
Professional and technical svc	21,367	20,706	18,374	18,443	18,742	19,481	20,521	18,895	17,049	-2,432	-12.5%	-4,318	-20.2%
Administrative and waste svc	15,624	14,277	14,395	15,227	15,166	14,669	13,054	12,126	11,938	-2,731	-18.6%	-3,686	-23.6%
Retail trade	13,458	13,456	13,572	12,377	11,202	10,941	11,458	10,502	10,209	-732	-6.7%	-3,249	-24.1%
Construction	6,198	6,253	5,822	5,450	5,232	5,391	5,375	4,866	4,404	-987	-18.3%	-1,794	-28.9%
Other services, ex public admin	9,276	8,491	8,104	7,770	7,687	7,407	7,412	6,952	6,515	-892	-12.0%	-2,761	-29.8%
Manufacturing	31,964	29,525	27,765	27,277	26,462	25,782	25,495	21,857	19,610	-6,172	-23.9%	-12,354	-38.6%
Information	7,151	6,566	6,373	6,050	5,750	4,807	5,404	5,078	4,351	-456	-9.5%	-2,800	-39.2%
Finance and insurance	23,046	21,690	21,524	18,020	17,691	16,228	15,540	14,571	13,370	-2,858	-17.6%	-9,676	-42.0%
Federal Government	8,213	7,689	7,728	5,343	5,267	5,213	5,845	5,761	4,456	-757	-14.5%	-3,757	-45.7%
CLEVELAND EMPLOYMENT	287,608	278,456	272,182	265,563	262,285	260,958	263,925	255,186	243,702	-17,256	-6.6%	-43,906	-15.3%

TABLE TWO: Cuyahoga County Suburbs Annual Employment Growth by Industry, 1Q 2002-1Q 2010
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q JOBS 2002</u>	<u>1Q JOBS 2003</u>	<u>1Q JOBS 2004</u>	<u>1Q JOBS 2005</u>	<u>1Q JOBS 2006</u>	<u>1Q JOBS 2007</u>	<u>1Q JOBS 2008</u>	<u>1Q JOBS 2009</u>	<u>1Q JOBS 2010</u>	<u>07-10 JOBS # INCR</u>	<u>07-10 JOBS % INCR</u>	<u>02-10 JOBS # INCR</u>	<u>02-10 JOBS % INCR</u>
Federal Government	8,117	8,908	8,673	10,706	10,654	10,830	10,900	11,100	12,499	1,669	15.4%	4,382	54.0%
Mgt companies enterprises	7,221	7,203	6,697	7,757	8,997	11,037	11,272	11,077	10,988	-49	-0.4%	3,767	52.2%
Educational services	7,264	7,399	7,686	7,571	7,635	7,958	7,940	8,542	8,697	739	9.3%	1,433	19.7%
Health care and social asst	56,479	58,381	59,466	60,096	62,073	62,129	62,441	62,274	63,211	1,082	1.7%	6,732	11.9%
Local Government	37,294	37,211	37,378	36,430	38,380	37,325	37,079	36,563	38,754	1,429	3.8%	1,460	3.9%
Accommodation food services	35,373	36,797	37,981	37,321	38,619	37,868	36,859	35,163	34,573	-3,295	-8.7%	-800	-2.3%
Professional and technical svc	24,873	23,959	23,742	25,652	26,839	26,639	27,053	25,464	24,253	-2,386	-9.0%	-620	-2.5%
Arts, entertainment, and rec	3,935	4,238	4,198	4,148	3,869	5,110	3,509	3,760	3,678	-1,432	-28.0%	-257	-6.5%
Mining	60	59	103	53	56	95	82	84	56	-39	-41.1%	-4	-6.7%
Transportation warehousing	16,296	17,526	17,239	17,666	17,444	18,222	17,766	16,405	15,058	-3,164	-17.4%	-1,238	-7.6%
Administrative and waste svc	28,578	28,518	27,905	29,222	30,353	31,907	30,265	26,392	25,268	-6,639	-20.8%	-3,310	-11.6%
Finance and insurance	31,435	32,706	33,850	35,917	34,796	32,171	29,498	28,106	27,581	-4,590	-14.3%	-3,854	-12.3%
Wholesale trade	28,898	28,835	28,976	28,669	29,304	28,381	27,432	25,588	23,594	-4,787	-16.9%	-5,304	-18.4%
Other services, ex public admin	16,492	15,775	14,855	14,859	15,017	14,727	14,501	13,918	13,349	-1,378	-9.4%	-3,143	-19.1%
Retail trade	63,803	61,605	60,280	57,975	56,893	56,525	55,163	52,548	50,493	-6,032	-10.7%	-13,310	-20.9%
Real estate rental leasing	11,165	10,495	10,354	10,106	9,689	9,709	8,886	8,711	8,586	-1,123	-11.6%	-2,579	-23.1%
Manufacturing	66,094	63,648	60,414	59,117	59,697	57,350	55,144	50,957	46,693	-10,657	-18.6%	-19,401	-29.4%
Information	12,578	11,216	10,452	10,215	10,313	10,604	9,934	9,303	8,880	-1,724	-16.3%	-3,698	-29.4%
Construction	17,044	16,726	17,225	15,998	16,570	16,380	15,553	13,558	12,010	-4,370	-26.7%	-5,034	-29.5%
Utilities	1,201	695	652	612	575	578	622	651	523	-55	-9.5%	-678	-56.5%
Agr/forestry/fishing/hunting	445	422	411	349	300	226	203	184	189	-37	-16.4%	-256	-57.5%
State Government	1,511	1,494	1,527	1,530	1,533	1,508	1,435	1,377	311	-1,197	-79.4%	-1,200	-79.4%
SUBURBS EMPLOYMENT	476,156	473,816	470,064	471,969	479,606	477,279	463,537	441,725	429,244	-48,035	-10.1%	-46,912	-9.9%

TABLE THREE: Cuyahoga County Annual Employment Growth by Industry, 1Q 2002-1Q 2010
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>	<u>07-10</u> <u>JOBS</u> <u>#</u> <u>INCR</u>	<u>07-10</u> <u>JOBS</u> <u>%</u> <u>INCR</u>	<u>02-10</u> <u>JOBS</u> <u>#</u> <u>INCR</u>	<u>02-10</u> <u>JOBS</u> <u>%</u> <u>INCR</u>
Educational services	17,224	18,028	18,881	19,387	19,633	19,485	19,446	21,155	21,385	1,900	9.8%	4,161	24.2%
Mgt companies enterprises	13,639	14,022	13,781	14,362	15,540	18,013	18,296	17,446	16,814	-1,199	-6.7%	3,175	23.3%
Health care and social asst	103,077	105,238	104,998	107,120	109,725	111,118	113,395	115,943	119,166	8,048	7.2%	16,089	15.6%
Federal Government	16,330	16,597	16,401	16,049	15,921	16,043	16,745	16,861	16,955	912	5.7%	625	3.8%
Mining	291	231	294	285	301	301	332	328	295	-6	-2.0%	4	1.4%
Accommodation food services	49,485	50,019	51,222	51,392	53,134	52,073	50,831	48,495	47,572	-4,501	-8.6%	-1,913	-3.9%
Transportation warehousing	20,412	21,866	21,817	21,981	22,093	22,408	21,860	20,438	18,896	-3,512	-15.7%	-1,516	-7.4%
Local Government	82,092	80,960	80,566	78,336	78,312	79,684	78,785	77,725	75,657	-4,027	-5.1%	-6,435	-7.8%
Professional and technical svc	46,240	44,665	42,116	44,095	45,581	46,120	47,574	44,359	41,302	-4,818	-10.4%	-4,938	-10.7%
Arts, entertainment, and rec	9,085	9,144	8,718	8,725	8,351	8,253	8,030	8,133	8,016	-237	-2.9%	-1,069	-11.8%
State Government	5,451	5,085	5,068	5,092	5,087	5,048	5,002	4,854	4,767	-281	-5.6%	-684	-12.5%
Real estate rental leasing	13,861	13,567	13,583	13,379	13,043	12,927	12,675	12,305	12,033	-894	-6.9%	-1,828	-13.2%
Administrative and waste svc	44,202	42,795	42,300	44,449	45,519	46,576	43,319	38,518	37,206	-9,370	-20.1%	-6,996	-15.8%
Wholesale trade	41,127	40,310	40,288	40,010	40,527	40,097	38,853	36,372	33,811	-6,286	-15.7%	-7,316	-17.8%
Retail trade	77,261	75,061	73,852	70,352	68,095	67,466	66,621	63,050	60,702	-6,764	-10.0%	-16,559	-21.4%
Other services, ex public admin	25,768	24,266	22,959	22,629	22,704	22,134	21,913	20,870	19,864	-2,270	-10.3%	-5,904	-22.9%
Finance and insurance	54,481	54,396	55,374	53,937	52,487	48,399	45,038	42,677	40,951	-7,448	-15.4%	-13,530	-24.8%
Construction	23,242	22,979	23,047	21,448	21,802	21,771	20,928	18,424	16,414	-5,357	-24.6%	-6,828	-29.4%
Manufacturing	98,058	93,173	88,179	86,394	86,159	83,132	80,639	72,814	66,303	-16,829	-20.2%	-31,755	-32.4%
Information	19,729	17,782	16,825	16,265	16,063	15,411	15,338	14,381	13,231	-2,180	-14.1%	-6,498	-32.9%
Utilities	2,243	1,643	1,544	1,477	1,493	1,526	1,617	1,558	1,394	-132	-8.7%	-849	-37.9%
Agr/forestry/fishing/hunting	466	445	433	368	321	252	225	205	212	-40	-15.9%	-254	-54.5%
CUYAHOGA EMPLOYMENT	763,764	752,272	742,246	737,532	741,891	738,237	727,462	696,911	672,946	-65,291	-8.8%	-90,818	-11.9%

TABLE FOUR: City of Cleveland Aggregate Real Earnings Growth by Industry, 1Q 2002-1Q 2010
Thousands of March 2010 Dollars, Consumer Price Index Deflator
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q EARN 2002</u>	<u>1Q EARN 2003</u>	<u>1Q EARN 2005</u>	<u>1Q EARN 2007</u>	<u>1Q EARN 2008</u>	<u>1Q EARN 2009</u>	<u>1Q EARN 2010</u>	<u>07-10 EARN \$ INCR</u>	<u>07-10 EARN % INCR</u>	<u>02-10 EARN # INCR</u>	<u>02-10 EARN % INCR</u>
Real estate rental leasing	\$24,519	\$30,131	\$31,361	\$38,568	\$36,709	\$34,736	\$32,437	-\$6,131	-15.9%	\$7,918	32.3%
Mgt companies enterprises	\$113,752	\$132,452	\$147,474	\$192,004	\$166,248	\$149,914	\$145,446	-\$46,558	-24.2%	\$31,694	27.9%
Health care social assistance	\$541,335	\$549,875	\$541,145	\$575,927	\$592,471	\$630,346	\$665,915	\$89,988	15.6%	\$124,580	23.0%
Educational services	\$112,603	\$119,200	\$127,140	\$111,413	\$111,302	\$122,385	\$120,883	\$9,470	8.5%	\$8,280	7.4%
Utilities	\$19,171	\$19,292	\$16,730	\$19,051	\$22,887	\$21,197	\$18,207	-\$844	-4.4%	-\$964	-5.0%
Admin and waste services	\$121,617	\$123,991	\$154,990	\$183,267	\$144,790	\$105,007	\$114,610	-\$68,657	-37.5%	-\$7,007	-5.8%
Accommodation food serv	\$57,580	\$55,020	\$59,350	\$61,517	\$58,984	\$54,362	\$52,625	-\$8,892	-14.5%	-\$4,955	-8.6%
Arts, entertainment, and rec	\$69,328	\$71,647	\$68,418	\$33,153	\$63,619	\$66,647	\$60,779	\$27,626	83.3%	-\$8,549	-12.3%
State Government	\$56,693	\$51,701	\$49,768	\$55,234	\$52,740	\$53,422	\$49,616	-\$5,618	-10.2%	-\$7,077	-12.5%
Wholesale trade	\$193,927	\$180,693	\$169,647	\$204,922	\$187,070	\$163,208	\$161,854	-\$43,068	-21.0%	-\$32,073	-16.5%
Transportation/warehousing	\$41,650	\$46,917	\$41,628	\$39,045	\$37,611	\$36,601	\$34,294	-\$4,751	-12.2%	-\$7,356	-17.7%
Professional technical serv	\$380,385	\$352,319	\$320,786	\$348,241	\$369,182	\$349,641	\$307,297	-\$40,944	-11.8%	-\$73,088	-19.2%
Local Government	\$572,796	\$544,986	\$495,149	\$495,276	\$485,513	\$495,900	\$451,191	-\$44,085	-8.9%	-\$121,605	-21.2%
Mining	\$4,008	\$2,951	\$3,023	\$2,409	\$3,255	\$3,614	\$3,061	\$652	27.1%	-\$947	-23.6%
Agr/forestry/fishing/hunt	\$114	\$112	\$96	\$106	\$103	\$92	\$87	-\$19	-17.8%	-\$27	-23.9%
Finance and insurance	\$510,928	\$513,807	\$525,047	\$540,818	\$477,487	\$483,881	\$376,836	-\$163,982	-30.3%	-\$134,092	-26.2%
Other serv, exc public admin	\$72,365	\$67,731	\$59,236	\$57,469	\$56,112	\$53,900	\$48,629	-\$8,840	-15.4%	-\$23,736	-32.8%
Construction	\$89,029	\$87,805	\$74,495	\$69,547	\$70,901	\$66,883	\$59,451	-\$10,096	-14.5%	-\$29,578	-33.2%
Retail trade	\$89,724	\$90,260	\$80,846	\$74,057	\$71,177	\$59,142	\$55,857	-\$18,200	-24.6%	-\$33,867	-37.7%
Manufacturing	\$405,708	\$370,217	\$342,006	\$322,752	\$322,108	\$262,640	\$242,108	-\$80,644	-25.0%	-\$163,600	-40.3%
Information	\$121,604	\$111,883	\$103,882	\$86,213	\$90,297	\$83,043	\$70,026	-\$16,187	-18.8%	-\$51,578	-42.4%
Federal Government	\$126,219	\$122,963	\$88,111	\$88,483	\$89,808	\$91,051	\$70,871	-\$17,612	-19.9%	-\$55,348	-43.9%
CLEVELAND TOTAL	\$3,725,055	\$3,645,953	\$3,500,327	\$3,599,473	\$3,510,375	\$3,387,611	\$3,142,080	-\$457,393	-12.7%	-\$582,975	-15.7%

TABLE FIVE: Cuyahoga County Suburbs Aggregate Real Earnings Growth by Industry, 1Q 2002-1Q 2009
Thousands of March 2010 Dollars, Consumer Price Index Deflator
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q EARN 2002</u>	<u>1Q EARN 2003</u>	<u>1Q EARN 2005</u>	<u>1Q EARN 2007</u>	<u>1Q EARN 2008</u>	<u>1Q EARN 2009</u>	<u>1Q EARN 2010</u>	<u>07-10 EARN \$ INCR</u>	<u>07-10 EARN % INCR</u>	<u>02-10 EARN # INCR</u>	<u>02-10 EARN % INCR</u>
Mgt of companies/enterprises	\$171,988	\$171,113	\$210,232	\$283,733	\$262,567	\$238,269	\$243,260	-\$40,473	-14.3%	\$71,272	41.4%
Mining	\$1,239	\$1,350	\$1,153	\$1,734	\$1,322	\$1,385	\$1,536	-\$198	-11.4%	\$297	23.9%
Educational services	\$54,747	\$54,974	\$59,345	\$66,766	\$62,352	\$66,619	\$62,709	-\$4,057	-6.1%	\$7,962	14.5%
Federal Government	\$168,422	\$164,742	\$203,473	\$207,309	\$183,313	\$179,902	\$190,484	-\$16,825	-8.1%	\$22,062	13.1%
Professional and technical services	\$353,912	\$332,661	\$370,032	\$404,642	\$412,733	\$410,108	\$357,955	-\$46,687	-11.5%	\$4,043	1.1%
Local Government	\$412,815	\$411,190	\$405,137	\$428,827	\$417,314	\$420,472	\$414,298	-\$14,529	-3.4%	\$1,483	0.4%
Health care and social assistance	\$543,435	\$544,897	\$542,268	\$568,951	\$559,695	\$554,452	\$535,454	-\$33,497	-5.9%	-\$7,981	-1.5%
Finance and insurance	\$481,684	\$504,864	\$576,315	\$593,365	\$540,970	\$467,064	\$449,776	-\$143,589	-24.2%	-\$31,908	-6.6%
Transportation and warehousing	\$169,990	\$198,133	\$205,465	\$216,604	\$211,889	\$179,359	\$155,810	-\$60,794	-28.1%	-\$14,180	-8.3%
Real estate and rental and leasing	\$110,854	\$102,300	\$115,344	\$117,568	\$119,794	\$102,120	\$99,298	-\$18,270	-15.5%	-\$11,556	-10.4%
Accommodation and food services	\$133,193	\$134,796	\$131,688	\$141,044	\$133,162	\$124,756	\$117,300	-\$23,744	-16.8%	-\$15,893	-11.9%
State Government	\$22,174	\$20,071	\$17,885	\$22,218	\$19,834	\$20,076	\$19,423	-\$2,795	-12.6%	-\$2,751	-12.4%
Administrative and waste services	\$210,014	\$207,201	\$203,505	\$243,952	\$235,564	\$206,378	\$180,746	-\$63,206	-25.9%	-\$29,268	-13.9%
Wholesale trade	\$487,762	\$485,540	\$493,243	\$519,740	\$481,598	\$452,179	\$389,405	-\$130,335	-25.1%	-\$98,357	-20.2%
Arts, entertainment, and recreation	\$66,429	\$76,539	\$49,292	\$95,219	\$61,604	\$57,702	\$51,855	-\$43,364	-45.5%	-\$14,574	-21.9%
Other services, except public admin	\$114,613	\$109,196	\$99,968	\$102,189	\$97,733	\$93,911	\$85,598	-\$16,591	-16.2%	-\$29,015	-25.3%
Construction	\$213,501	\$211,436	\$207,397	\$220,044	\$201,812	\$176,275	\$149,332	-\$70,712	-32.1%	-\$64,169	-30.1%
Manufacturing	\$1,017,330	\$987,783	\$936,152	\$938,164	\$832,525	\$748,999	\$663,159	-\$275,005	-29.3%	-\$354,171	-34.8%
Retail trade	\$461,078	\$447,829	\$389,667	\$465,482	\$349,353	\$327,779	\$298,666	-\$166,816	-35.8%	-\$162,412	-35.2%
Information	\$196,895	\$158,139	\$149,084	\$162,877	\$146,263	\$144,390	\$124,720	-\$38,157	-23.4%	-\$72,175	-36.7%
Agriculture/forestry/fishing/hunting	\$1,967	\$1,863	\$1,667	\$1,349	\$1,187	\$1,074	\$1,001	-\$348	-25.8%	-\$966	-49.1%
Utilities	\$26,485	\$16,203	\$14,409	\$12,760	\$16,295	\$16,114	\$11,914	-\$846	-6.6%	-\$14,571	-55.0%
SUBURBS TOTAL	\$5,420,529	\$5,342,819	\$5,382,722	\$5,814,537	\$5,348,880	\$4,989,383	\$4,603,699	-\$1,210,838	-20.8%	-\$816,830	-15.1%

TABLE SIX: Cuyahoga County Aggregate Real Earnings Growth by Industry, 1Q 2002-1Q 2009

Thousands of March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q EARN 2002</u>	<u>1Q EARN 2003</u>	<u>1Q EARN 2005</u>	<u>1Q EARN 2007</u>	<u>1Q EARN 2008</u>	<u>1Q EARN 2009</u>	<u>1Q EARN 2010</u>	<u>07-10 EARN \$ INCR</u>	<u>07-10 EARN % INCR</u>	<u>02-10 EARN # INCR</u>	<u>02-10 EARN % INCR</u>
Mgt companies enterprises	\$288,360	\$306,616	\$361,103	\$480,160	\$432,644	\$391,636	\$388,706	-\$91,454	-19.0%	\$103,276	35.8%
Educational services	\$169,944	\$176,919	\$189,414	\$180,745	\$176,218	\$191,823	\$183,592	\$2,847	1.6%	\$21,879	12.9%
Health care social assistance	\$1,097,241	\$1,107,439	\$1,095,880	\$1,158,146	\$1,165,815	\$1,199,319	\$1,201,369	\$43,223	3.7%	\$102,078	9.3%
Professional technical serv	\$743,060	\$693,097	\$698,209	\$760,906	\$790,420	\$767,803	\$665,252	-\$95,654	-12.6%	\$24,743	3.3%
Transportation/warehousing	\$212,600	\$246,131	\$248,051	\$256,549	\$250,366	\$216,803	\$190,104	-\$66,445	-25.9%	\$4,203	2.0%
Real estate rental leasing	\$135,937	\$133,125	\$147,427	\$157,024	\$157,349	\$137,657	\$131,735	-\$25,289	-16.1%	\$1,719	1.3%
Finance and insurance	\$1,004,383	\$1,030,508	\$1,113,458	\$1,146,643	\$1,029,457	\$962,092	\$826,612	-\$320,031	-27.9%	-\$42,290	-4.2%
Mining	\$5,340	\$4,369	\$4,246	\$4,199	\$4,652	\$5,082	\$4,597	\$398	9.5%	-\$258	-4.8%
Accommodation food serv	\$192,100	\$191,083	\$192,405	\$203,979	\$193,504	\$180,371	\$169,925	-\$34,054	-16.7%	-\$11,729	-6.1%
Admin and waste services	\$334,433	\$334,048	\$362,066	\$431,440	\$383,691	\$313,804	\$295,356	-\$136,084	-31.5%	-\$20,629	-6.2%
State Government	\$80,173	\$72,963	\$68,800	\$78,725	\$73,789	\$74,729	\$69,039	-\$9,686	-12.3%	-\$5,444	-6.8%
Local Government	\$998,807	\$968,731	\$911,692	\$935,513	\$914,013	\$927,796	\$865,489	-\$70,024	-7.5%	-\$71,011	-7.1%
Federal Government	\$297,549	\$290,538	\$293,614	\$297,830	\$275,190	\$273,050	\$261,355	-\$36,475	-12.2%	-\$24,499	-8.2%
Arts, entertainment, and rec	\$137,353	\$149,837	\$119,286	\$129,135	\$126,688	\$125,885	\$112,634	-\$16,501	-12.8%	-\$11,468	-8.3%
Wholesale trade	\$686,157	\$670,395	\$666,798	\$729,383	\$672,978	\$619,147	\$551,259	-\$178,124	-24.4%	-\$67,010	-9.8%
Utilities	\$46,098	\$35,939	\$31,524	\$32,249	\$39,709	\$37,799	\$30,121	-\$2,128	-6.6%	-\$8,299	-18.0%
Construction	\$304,581	\$301,264	\$283,609	\$291,193	\$274,347	\$244,699	\$208,783	-\$82,410	-28.3%	-\$59,882	-19.7%
Other serv, exc public admin	\$188,645	\$178,487	\$160,569	\$160,983	\$155,138	\$149,052	\$134,227	-\$26,756	-16.6%	-\$39,593	-21.0%
Information	\$321,301	\$272,599	\$255,358	\$251,076	\$238,640	\$229,347	\$194,746	-\$56,330	-22.4%	-\$91,954	-28.6%
Manufacturing	\$1,432,384	\$1,366,530	\$1,286,038	\$1,268,351	\$1,162,054	\$1,017,689	\$905,267	-\$363,084	-28.6%	-\$414,695	-29.0%
Retail trade	\$552,869	\$540,169	\$472,375	\$541,246	\$422,170	\$388,283	\$354,523	-\$186,723	-34.5%	-\$164,586	-29.8%
Agr/forestry/fishing/hunt	\$2,084	\$1,977	\$1,765	\$1,457	\$1,292	\$1,168	\$1,088	-\$369	-25.3%	-\$916	-43.9%
CUYAHOGA TOTAL	\$9,231,399	\$9,072,764	\$8,963,686	\$9,496,932	\$8,940,124	\$8,455,034	\$7,745,779	-\$1,751,153	-18.4%	-\$776,365	-8.4%

TABLE SEVEN: City of Cleveland Aggregate Real Mean Earnings of a Job by Industry, 1Q 2002-1Q 2010

March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>	<u>07-10</u> <u>EARN</u> <u>\$</u> <u>INCR</u>	<u>07-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>#</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>
Finance and insurance	\$88,680	\$94,755	\$103,263	\$116,548	\$124,467	\$133,305	\$122,905	\$132,834	\$112,741	-\$20,564	-15.4%	\$44,154	49.8%
Mgt of companies and enterprises	\$70,896	\$77,696	\$83,984	\$89,310	\$100,872	\$110,094	\$94,674	\$94,152	\$99,860	-\$10,234	-9.3%	\$23,256	32.8%
Utilities	\$73,594	\$81,400	\$79,470	\$77,363	\$85,958	\$80,384	\$92,007	\$93,481	\$83,614	\$3,231	4.0%	\$19,886	27.0%
Arts, entertainment, and recreation	\$53,847	\$58,416	\$56,505	\$59,793	\$54,528	\$42,192	\$56,287	\$60,963	\$56,043	\$13,851	32.8%	\$7,116	13.2%
Administrative and waste services	\$31,136	\$34,739	\$35,193	\$40,714	\$42,386	\$49,974	\$44,367	\$34,639	\$38,402	-\$11,572	-23.2%	\$3,503	11.2%
State Government	\$57,556	\$57,590	\$58,872	\$55,888	\$57,505	\$62,411	\$59,142	\$61,458	\$44,539	-\$17,873	-28.6%	\$3,902	6.8%
Real estate and rental and leasing	\$36,378	\$39,233	\$37,854	\$38,327	\$44,734	\$47,940	\$38,753	\$38,660	\$37,641	-\$10,299	-21.5%	\$2,282	6.3%
Professional and technical services	\$71,210	\$68,061	\$70,619	\$69,574	\$70,853	\$71,504	\$71,962	\$74,018	\$72,097	\$594	0.8%	\$2,808	3.9%
Federal Government	\$61,473	\$63,968	\$65,498	\$65,963	\$63,433	\$67,894	\$61,460	\$63,219	\$63,618	-\$4,276	-6.3%	\$1,746	2.8%
Health care and social assistance	\$46,469	\$46,941	\$46,986	\$46,031	\$47,651	\$47,025	\$46,510	\$46,980	\$47,604	\$579	1.2%	\$512	1.1%
Accommodation and food services	\$16,321	\$16,645	\$16,271	\$16,872	\$15,921	\$17,323	\$16,886	\$16,310	\$16,194	-\$1,129	-6.5%	-\$11	-0.1%
Other services, except public admin	\$31,205	\$31,907	\$32,174	\$30,495	\$30,242	\$31,035	\$30,282	\$31,013	\$29,857	-\$1,179	-3.8%	-\$193	-0.6%
Information	\$68,021	\$68,159	\$70,824	\$68,682	\$67,967	\$71,740	\$66,837	\$65,414	\$64,377	-\$7,363	-10.3%	-\$2,606	-3.8%
Construction	\$57,457	\$56,169	\$54,442	\$54,675	\$53,318	\$51,602	\$52,764	\$54,980	\$53,997	\$2,395	4.6%	-\$2,477	-4.3%
Wholesale trade	\$63,432	\$62,987	\$60,091	\$59,835	\$64,922	\$69,963	\$65,518	\$60,537	\$63,367	-\$6,597	-9.4%	-\$2,895	-4.6%
Manufacturing	\$50,771	\$50,156	\$49,495	\$50,153	\$50,277	\$50,074	\$50,537	\$48,065	\$49,385	-\$689	-1.4%	-\$2,705	-5.3%
Local Government	\$51,145	\$49,828	\$51,401	\$47,263	\$45,657	\$46,769	\$46,565	\$48,190	\$48,906	\$2,136	4.6%	-\$2,955	-5.8%
Transportation and warehousing	\$40,476	\$43,242	\$39,596	\$38,589	\$39,854	\$37,310	\$36,747	\$36,301	\$35,742	-\$1,569	-4.2%	-\$4,175	-10.3%
Educational services	\$45,222	\$44,858	\$45,180	\$43,040	\$40,985	\$38,661	\$38,694	\$38,812	\$38,109	-\$552	-1.4%	-\$6,410	-14.2%
Mining	\$69,402	\$68,619	\$59,717	\$52,125	\$52,250	\$46,775	\$52,075	\$59,239	\$51,230	\$4,455	9.5%	-\$10,163	-14.6%
Retail trade	\$26,668	\$26,831	\$26,995	\$26,128	\$26,733	\$27,075	\$24,848	\$22,526	\$21,885	-\$5,190	-19.2%	-\$4,142	-15.5%
Agriculture/forestry/fishing/hunting	\$21,779	\$19,508	\$19,202	\$20,134	\$20,319	\$16,290	\$18,707	\$17,529	\$15,130	-\$1,160	-7.1%	-\$4,250	-19.5%
CITY OF CLEVELAND TOTAL	\$51,807	\$52,374	\$53,302	\$52,723	\$53,836	\$55,173	\$53,203	\$53,100	\$51,805	-\$3,368	-6.1%	\$1,293	2.5%

TABLE EIGHT: Cuyahoga County Suburbs Aggregate Real Mean Earnings of a Job by Industry, 1Q 2002-1Q 2010
March 2010 Dollars, Consumer Price Index Deflator
Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>	<u>07-10</u> <u>EARN</u> <u>\$</u> <u>INCR</u>	<u>07-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>#</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>
Agriculture/forestry/fishing/hunting	\$17,684	\$17,655	\$19,366	\$19,103	\$20,297	\$23,870	\$23,389	\$23,355	\$21,185	-\$2,685	-11.2%	\$5,670	32.1%
Real estate and rental and leasing	\$39,715	\$38,990	\$40,441	\$45,654	\$48,388	\$48,437	\$53,925	\$46,893	\$46,260	-\$2,176	-4.5%	\$7,178	18.1%
Professional and technical services	\$56,915	\$55,538	\$56,633	\$57,700	\$61,098	\$60,759	\$61,026	\$64,422	\$59,037	-\$1,722	-2.8%	\$7,507	13.2%
Utilities	\$88,209	\$93,255	\$82,229	\$94,176	\$94,434	\$88,302	\$104,791	\$99,009	\$91,120	\$2,819	3.2%	\$10,800	12.2%
Finance and insurance	\$61,293	\$61,746	\$65,321	\$64,183	\$69,285	\$73,776	\$73,357	\$66,472	\$65,230	-\$8,547	-11.6%	\$5,179	8.4%
Administrative and waste services	\$29,395	\$29,062	\$28,609	\$27,856	\$29,324	\$30,583	\$31,134	\$31,279	\$28,613	-\$1,970	-6.4%	\$1,884	6.4%
Transportation and warehousing	\$41,726	\$45,220	\$45,848	\$46,522	\$46,106	\$47,548	\$47,707	\$43,733	\$41,389	-\$6,159	-13.0%	\$2,007	4.8%
Wholesale trade	\$67,515	\$67,354	\$69,877	\$68,819	\$72,901	\$73,252	\$70,224	\$70,686	\$66,018	-\$7,234	-9.9%	\$3,171	4.7%
Local Government	\$44,277	\$44,201	\$44,474	\$44,484	\$45,923	\$45,956	\$45,019	\$46,000	\$42,762	-\$3,194	-7.0%	\$1,723	3.9%
Construction	\$50,106	\$50,565	\$50,964	\$51,856	\$53,024	\$53,735	\$51,903	\$52,006	\$49,736	-\$3,999	-7.4%	\$1,900	3.8%
Educational services	\$30,147	\$29,720	\$32,173	\$31,354	\$33,287	\$33,559	\$31,412	\$31,196	\$28,842	-\$4,717	-14.1%	\$1,049	3.5%
State Government	\$58,700	\$53,737	\$49,202	\$46,758	\$48,136	\$58,935	\$55,287	\$58,319	\$249,814	\$190,879	323.9%	-\$382	-0.7%
Information	\$62,616	\$56,398	\$60,903	\$58,378	\$58,678	\$61,440	\$58,894	\$62,083	\$56,180	-\$5,260	-8.6%	-\$533	-0.9%
Other services, except public admin	\$27,798	\$27,688	\$27,585	\$26,911	\$28,491	\$27,756	\$26,959	\$26,990	\$25,649	-\$2,106	-7.6%	-\$809	-2.9%
Manufacturing	\$61,569	\$62,078	\$62,630	\$63,342	\$62,543	\$65,434	\$60,389	\$58,795	\$56,810	-\$8,624	-13.2%	-\$2,774	-4.5%
Accommodation and food services	\$15,062	\$14,653	\$14,368	\$14,114	\$14,680	\$14,899	\$14,451	\$14,192	\$13,571	-\$1,327	-8.9%	-\$870	-5.8%
Health care and social assistance	\$38,488	\$37,334	\$37,281	\$36,093	\$36,877	\$36,630	\$35,854	\$35,614	\$33,884	-\$2,747	-7.5%	-\$2,874	-7.5%
Arts, entertainment, and recreation	\$67,526	\$72,240	\$53,668	\$47,533	\$61,447	\$74,535	\$70,224	\$61,385	\$56,395	-\$18,140	-24.3%	-\$6,141	-9.1%
Mgt of companies and enterprises	\$95,271	\$95,023	\$97,268	\$108,409	\$115,271	\$102,830	\$93,175	\$86,041	\$88,555	-\$14,275	-13.9%	-\$9,230	-9.7%
Retail trade	\$28,906	\$29,077	\$27,994	\$26,885	\$27,303	\$32,940	\$25,332	\$24,951	\$23,660	-\$9,280	-28.2%	-\$3,956	-13.7%
Mining	\$82,628	\$91,556	\$66,857	\$87,046	\$39,374	\$73,022	\$64,512	\$65,952	\$109,714	\$36,692	50.2%	-\$16,676	-20.2%
Federal Government	\$82,997	\$73,975	\$77,394	\$76,022	\$76,799	\$76,568	\$67,271	\$64,830	\$60,960	-\$15,609	-20.4%	-\$18,168	-21.9%
SUBURBS TOTAL	\$75,388	\$76,749	\$78,430	\$81,076	\$86,360	\$89,126	\$81,067	\$78,208	\$75,904	-\$13,222	-14.8%	\$2,820	3.7%

TABLE NINE: Cuyahoga County Aggregate Real Mean Earnings of a Job by Industry, 1Q 2002-1Q 2010

March 2010 Dollars, Consumer Price Index Deflator

Source: George Zeller from ODJFS NAICS QCEW ES-202 Special Project

<u>NAICS INDUSTRY</u>	<u>1Q</u> <u>JOBS</u> <u>2002</u>	<u>1Q</u> <u>JOBS</u> <u>2003</u>	<u>1Q</u> <u>JOBS</u> <u>2004</u>	<u>1Q</u> <u>JOBS</u> <u>2005</u>	<u>1Q</u> <u>JOBS</u> <u>2006</u>	<u>1Q</u> <u>JOBS</u> <u>2007</u>	<u>1Q</u> <u>JOBS</u> <u>2008</u>	<u>1Q</u> <u>JOBS</u> <u>2009</u>	<u>1Q</u> <u>JOBS</u> <u>2010</u>	<u>07-10</u> <u>EARN</u> <u>\$</u> <u>INCR</u>	<u>07-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>#</u> <u>INCR</u>	<u>02-10</u> <u>EARN</u> <u>%</u> <u>INCR</u>
Agriculture/forestry/fishing/hunting	\$17,892	\$17,774	\$19,381	\$19,180	\$20,329	\$23,126	\$22,974	\$22,799	\$20,528	-\$2,271	-10.0%	\$4,908	27.4%
Finance and insurance	\$73,742	\$75,778	\$80,994	\$82,575	\$88,851	\$94,766	\$91,430	\$90,174	\$80,742	-\$9,433	-10.5%	\$16,432	22.3%
Utilities	\$82,207	\$87,497	\$81,693	\$85,373	\$90,440	\$84,533	\$98,229	\$97,044	\$86,430	-\$10,614	-10.9%	\$14,837	18.0%
Real estate and rental and leasing	\$39,229	\$39,250	\$40,034	\$44,077	\$47,713	\$48,588	\$49,657	\$44,748	\$43,791	-\$957	-2.1%	\$5,519	14.1%
Professional and technical services	\$64,279	\$62,071	\$63,445	\$63,337	\$65,780	\$65,994	\$66,458	\$69,235	\$64,428	-\$4,807	-6.9%	\$4,957	7.7%
Administrative and waste services	\$30,264	\$31,223	\$31,125	\$32,583	\$34,001	\$37,053	\$35,429	\$32,588	\$31,754	-\$834	-2.6%	\$2,324	7.7%
Mgt of companies and enterprises	\$84,569	\$87,467	\$91,434	\$100,572	\$110,187	\$106,625	\$94,588	\$89,794	\$92,472	\$2,678	3.0%	\$5,225	6.2%
State Government	\$58,832	\$57,395	\$56,906	\$54,045	\$55,607	\$62,381	\$59,008	\$61,581	\$57,931	-\$3,651	-5.9%	\$2,750	4.7%
Arts, entertainment, and recreation	\$60,475	\$65,545	\$55,813	\$54,687	\$58,407	\$62,588	\$63,107	\$61,913	\$56,205	-\$5,709	-9.2%	\$1,438	2.4%
Wholesale trade	\$66,735	\$66,524	\$67,518	\$66,663	\$71,105	\$72,762	\$69,285	\$68,090	\$65,217	-\$2,874	-4.2%	\$1,355	2.0%
Transportation and warehousing	\$41,662	\$45,025	\$44,727	\$45,139	\$44,983	\$45,796	\$45,813	\$42,431	\$40,242	-\$2,189	-5.2%	\$770	1.8%
Construction	\$52,419	\$52,442	\$52,159	\$52,892	\$53,390	\$53,501	\$52,436	\$53,126	\$50,879	-\$2,247	-4.2%	\$707	1.3%
Local Government	\$48,668	\$47,862	\$48,822	\$46,553	\$46,324	\$46,961	\$46,405	\$47,748	\$45,759	-\$1,989	-4.2%	-\$920	-1.9%
Information	\$65,143	\$61,320	\$65,279	\$62,799	\$62,564	\$65,168	\$62,235	\$63,792	\$58,876	-\$4,916	-7.7%	-\$1,351	-2.1%
Other services, except public admin	\$29,284	\$29,422	\$29,466	\$28,383	\$29,320	\$29,092	\$28,319	\$28,568	\$27,029	-\$1,539	-5.4%	-\$716	-2.4%
Health care and social assistance	\$42,579	\$42,093	\$41,959	\$40,922	\$42,033	\$41,691	\$41,124	\$41,376	\$40,326	-\$1,050	-2.5%	-\$1,203	-2.8%
Accommodation and food services	\$15,528	\$15,281	\$14,957	\$14,975	\$15,119	\$15,669	\$15,227	\$14,877	\$14,288	-\$590	-4.0%	-\$650	-4.2%
Manufacturing	\$58,430	\$58,666	\$58,853	\$59,543	\$59,131	\$61,028	\$57,642	\$55,906	\$54,614	-\$1,292	-2.3%	-\$2,524	-4.3%
Educational services	\$39,467	\$39,254	\$40,502	\$39,081	\$38,569	\$37,104	\$36,248	\$36,270	\$34,340	-\$1,930	-5.3%	-\$3,197	-8.1%
Federal Government	\$72,884	\$70,022	\$72,500	\$73,179	\$72,860	\$74,258	\$65,737	\$64,777	\$61,659	-\$3,118	-4.8%	-\$8,107	-11.1%
Retail trade	\$28,623	\$28,786	\$27,925	\$26,858	\$27,311	\$32,090	\$25,348	\$24,633	\$23,362	-\$1,272	-5.2%	-\$3,990	-13.9%
Mining	\$73,398	\$75,655	\$63,112	\$59,596	\$50,834	\$55,796	\$56,050	\$61,973	\$62,332	\$359	0.6%	-\$11,425	-15.6%
CUYAHOGA COUNTY TOTAL	\$75,388	\$76,749	\$78,430	\$81,076	\$86,360	\$89,126	\$81,067	\$78,208	\$75,904	-\$2,304	-2.9%	\$2,820	3.7%