

# **Jobs & Wages: The Tourism Industry Dilemma**

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**Research Note 22  
December, 1995**

## **Jobs & Wages: The Tourism Industry Dilemma**

Many people in Montana believe the pursuit of tourism as an economic development strategy is not wise. Tourism is perceived as producing minimum wage 'hamburger flipper' jobs rather than decent 'living wage' jobs like those in the mining, timber and other basic industries.

Even nationally, the concerns about tourism and the economy center around low wages, little career opportunity, and seasonal and part-time jobs that leave workers under-employed (Barrett, 1987). As recently as the October 1995 White House Conference on Travel and Tourism, the number one stated goal was to demonstrate the economic power of the travel and tourism industry. Within this goal, two objectives related directly to the perception of tourism's economic impact and the perception of tourism career opportunities. Objective number one stated: Articulate the economic significance of the industry to economic, social and political segments that will result in greater awareness of travel and tourism as a generator of quality jobs, tax revenues for federal, state and local governments, and the number one service export in our national economy. Objective number three stated: Increase awareness of travel and tourism's contribution to job creation and enhance career and employment opportunities and worker skills through improved public and private sector coordination of education training initiatives.

But what is the tourism *industry*? Much of the difficulty describing tourism wages comes from the lack of a standard industrial classification (SIC) for the jobs. Unlike other basic industries that bring new money into the state (e.g. mining, timber and agriculture), there is no clean delineation of what comprises a tourism job. This is not a Montana phenomenon. Again, at the 1995 White House Conference on Travel and Tourism, objective two under the goal of demonstrating the economic power of the travel and tourism industry is to develop a reliable economic analysis of the \$417 billion-a-year travel and tourism industry by adopting uniform public and private sector data collection and reporting methods and better representation of the industry in government accounting systems. The most critical recommendation was to revise the SIC codes to account for the travel and tourism-related businesses.

While it is said that "No one understands us," the people within the tourism industry have accomplished little to change those impressions. Since tourism is misunderstood and tends to be viewed as a negative direction for economic development, it is important to address the issues described above. By doing so, the claims can be proven right or wrong and appropriate action(s) can follow. Because of these misunderstandings, the Institute for Tourism and Recreation Research staff sought to find existing information which could shed additional light on this misnomer.

### **Purpose**

The purpose of this report was to analyze tourism wages, job types, and career opportunities compared with other job types in Montana. Specifically, this report will:

1. Investigate Montana's tourism job types and wage ranges;
2. Compare job types and wage ranges to other industry jobs, and;
3. Analyze the possible significance tourism jobs have for Montana.

### **Background**

This report is in response to the study completed by the Bureau of Business and Economic Research at the University of Montana. While the intent of the study was a little unclear, what it did provide was a list of wage rates for many jobs in Montana's travel industry (Sylvester *et. al.* 1993). These wage estimates were derived from a 1993 survey of front-line tourism businesses in the state. The report included breakdowns by type of firm and type of job with wages in 1992 dollars. Occupations reported were:

- Managers and administrators (\$8.98 mean hourly wage)
- Technical, clerical and administrative support (\$5.50 mhw)
- Sales and marketing (\$5.61 mhw)
- Professional specialist (\$7.09 mhw)
- Food preparers and supervisors (\$5.80 mhw)
- Food servers and cleanup (\$4.94 mhw)
- Cleaning and maintenance (\$5.02 mhw)
- Attendants, guides and handlers (\$5.79 mhw)
- Drivers and operators (\$6.80 mhw)
- Also included were proprietor's income at \$27,900 per year average overall. A proprietor, in this case, is the owner of a tourism business.

While this information is interesting, it did not provide any further insight into the economic potential of tourism or the wage dilemma. In addition the study did not identify the relative number of each tourism job within the state, nor did it consider jobs supported by tourism in other than the most obvious front-line businesses. While the report did provide up-to-date information about wages for front-line tourism jobs in Montana, it did not adequately address the concerns of the industry or its opponents regarding the quality of employment opportunities. These concerns are addressed in this report.

### **Sources of data**

In order to look at tourism wages and job types in comparison to other job types in the state as well as the contribution of these jobs to the state's economy, three sources of information were used. Data from 1993 was used since this is the most recent data available from all three information sources. These sources were:

1. The U.S. Department of Commerce;
2. The Montana Department of Labor & Industry, and;
3. The Institute for Tourism and Recreation Research (ITRR), University of Montana, 1993 Nonresident Travel Survey

The U.S. Department of Commerce provided Regional Economic Information System (REIS) data. This data is collected each year in February for one week. Only jobs that exist during that week in February, are included in the REIS data. The jobs are listed within the categories provided in the Standard Industrial Classification (SIC) codes. The U.S. Department of Commerce uses the data to estimate annual wages paid by industry sectors in Montana (timber, manufacturing, mining etc.). These wages are presented in the second column of Table 1.

The Montana Department of Labor and Industry provided an annual wage study by occupational classification (managers, food preparers etc.). The data was based on an estimate of the month-to-month change in an established level of employment. The change was measured through a sample survey of firms. This information is presented in Table 1, column three, for the same SIC codes used in the U.S. Department of Commerce data.

Finally, the 1993 Nonresident Travel Survey by ITRR provided the traveler expenditures in the state (for a summary of the study's economic findings see Christensen *et. al.* 1995). The ITRR data was used in the IMPLAN economic model to determine the contribution of travel expenditures to the Montana economy. IMPLAN is an input-output model developed by the U.S. Forest Service which is used by agencies and consultants nation wide. IMPLAN provides estimates of the amount of personal and property income, employment, value added, and overall production in a specified county, group of counties, state, region, or nation (Watson & Cordell 1990). For this study, the expenditure data from the 1993 nonresident travel study was input into IMPLAN to produce estimates of direct, indirect, induced and total economic impacts. Direct and indirect jobs are all those that are necessary to provide the goods and services consumed by nonresident

travelers.<sup>1</sup> The IMPLAN model contains economic data that describe the interactions and relationships among more than 300 business sectors within Montana's economy. IMPLAN can simulate the economic interactions and relationships between these sectors in the state's economy. All levels of economic impact that occur, throughout the distribution of spending and production, are taken into account in the modeling. The results include estimates of the number of jobs that are supported (directly, indirectly or through induced spending) by the nonresident travelers within each of the 300+ business sectors in the state.

The findings provided in this report are based on tourism as all travel in Montana by people living outside the state. In other words, travel by residents is not included. This was necessary since nonresident economic data was the only data available.

## Findings and Discussion

With the use of the above mentioned data sources, the findings are presented for each stated purpose. First, tourism job types and wage ranges will be discussed, followed by a comparison to other industries. The last discussion will analyze the significance of tourism jobs to Montana.

### Montana Tourism Job Types

In an effort to understand tourism jobs, it is important to look at jobs which are easily viewed as tourism jobs as well as those which are supported by the tourism industry. Figure 1 and Table 1 (first column) depict the types of occupations which are supported by tourism in Montana. Tourism is generally considered being part of the service sector. In fact, a large portion of tourism jobs **are** in the service sector, with the majority of these in the lodging industry. But, tourism also supports jobs in other SIC categories including retail sales, distribution, wholesale, manufacturing, and government. Figure 1 graphically delineates the idea that retail trade and services are, by far, the major industrial sectors influenced by tourism spending. Yet tourism spending supports 24 percent of the other types of jobs such as manufacturing, wholesale trade, and other categories.

Part-time and Seasonal Work. A great deal of discussion about tourism jobs is the part-time or seasonal component which seems to exist. As seen in Figures 2 and 3, the restaurant and lodging industries (half of the tourism jobs) support the concern that tourism jobs **are** part-time and seasonal. In Figure 2, the lodging industry shows large swings in employment levels. The restaurant and bar jobs, however, are more stable over time, following the pattern of other private sector jobs. In Figure 3 it is shown that the part-time nature of jobs in these two sectors is prevalent, especially in the eating and drinking establishments. Restaurant and bar jobs employ workers at an average of 24 hours per week which is much less than the 34 hours per week of other industry employees.

### Montana Tourism Wages

A breakdown of employment by specific types of industries shows a clear picture. The distribution of jobs by sector and the average annual and hourly wages paid in those sectors is outlined in Table 1. Using a methodology to estimate overall average wages that takes into account the relative **number** of each type of job (weighted averaging), it is possible to compare tourism jobs with all private sector jobs. As Table 1 shows,

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<sup>1</sup> Not included in this discussion are jobs that are generated by tourism workers spending their pay checks - the induced jobs. Induced jobs are not included in the discussion of the tourism industry because they would be created by any employed Montanan earning similar wages regardless of how they earned a living. However, the importance of these induced jobs should not be discounted - according to the ITRR nonresident study, the IMPLAN model estimated that 40% of all jobs supported by tourism resulted from induced spending by tourism workers.

the average hourly wage for all tourism jobs is \$7.56 with yearly earnings of \$14,670. These wage levels are at 78% of hourly wage and 75% of yearly earnings of all private sector nonagricultural jobs in the state.

It is apparent through the existing data that almost half of all tourism jobs are in eating and drinking or lodging establishments. It is also evident that these two types of businesses tend to pay the lowest wages of any sector, thus accounting for the relatively low wages paid **on average** in tourism jobs. This is probably due to the part-time and seasonal nature of the jobs. What can also be seen, though, is that half of the jobs are not in these two low-paying sectors, but are distributed throughout the economy, some in sectors with very respectable wage rates. While many of the tourism jobs are at the lower end of the pay scale, there are also substantial opportunities for employment at more acceptable 'living wage' rates. In fact, it might be argued that the lower paying, part-time and seasonal jobs are not meant to be compared to career positions in the industry.

### **Tourism Job Types and Wages Compared to Other Industries**

A comparison of wages between tourism jobs and other occupations is provided in Table 2. The other common occupations in this table could be replaced by a number of jobs so it is important to realize the selection of jobs listed excludes many jobs which could be listed. The intent with this table was to show other types of occupations with similar wages. Again, these are only listed for comparison purposes and not to be used as pitting one job against another. Basically, the table is able to demonstrate that tourism jobs exist at all wage levels from minimum to over \$20 per hour.

### **Tourism Job Opportunities Explored**

While half of the tourism jobs occur in two low-wage sectors (lodging and eating and drinking), the other half do not fall into these sectors. Perhaps the greatest contribution of the low-wage sectors may be the opportunity provided by the widespread availability of jobs and the entry level positions not available elsewhere. Many people get their first job experience working in the eating and drinking, lodging or other tourism sectors. A report by Barrett (1987), based on the 1980 U.S. Census of the Population, showed 21% of the tourism workers were teenagers as compared to 15% in overall retail trade and services and 8% in all industries. In addition, these jobs provide opportunities to gain management experience that can enable experienced workers to move into other, more lucrative, sectors. Table 3 lists 60 of the most common jobs in the Montana economy in order of occurrence. Many of the most common jobs are at least partially attributable to tourism. In fact, the top four jobs could all be considered tourism-related. While these most frequent jobs pay low hourly wages, they do provide experience needed to move into some of the other commonly occurring jobs in the list that do pay better wages. For example, many managerial opportunities are listed, including retail sales management which is the 15th most commonly available job in the state with an average wage of over \$11 per hour.

## **Discussion and Conclusions**

An essential element in a healthy economy is a diversity of income sources. Relying on any one basic industry to bring money into the state involves the risk that circumstances may suddenly decline or change unexpectedly. This has occurred in Montana. One of the severest examples of one industry profoundly affecting the whole state occurred in 1903 when the Amalgamated Copper Company (Anaconda Copper) shut down most of its operations for 45 days, affecting nearly 80% of Montana wage earners (Toole 1972). The weather was the problem that nearly wiped out agriculture in the eastern two-thirds of Montana during the drought years of 1917 to 1920, putting the state into the great depression years before the rest of the nation (Toole 1972). In the 1990's, tourism is a strong industry in the state, and on equal footing with mining,

transportation and wood products (Polzin, 1995). Tourism should not be the dominant industry, but it can provide one component of a diverse and healthy economy in Montana.

Looking at employment in the tourism industry, two concerns stand out. First, in comparison to other industries, many tourism jobs pay lower than average hourly wages. Second, many tourism jobs are more seasonal or part time than those in other areas of the economy. These two concerns are valid points that must be remembered as tourism development continues. But these conditions do not make tourism employment opportunities inherently bad.

Many of the tourism jobs having these characteristics are entry level positions, which do not require advanced training or specific skills. These jobs provide teenagers with their first on-the-job experience, helping them to develop a work ethic. In addition, seasonal jobs help meet the needs of an enlarged labor market during the summer vacation months. Tourism is one of the few industries with the capability of significantly increasing employment during the summer months. And, part-time work is valuable for seniors, students, and parents of school-age children. In other words, while the wages in many tourism jobs are not the highest in the work force, the positions provide opportunities that otherwise would not be available.

Another consideration when evaluating the merits of tourism employment is that many of the jobs are not entry-level or part time. As Table 1 illustrates, there are jobs supported throughout the economy by traveler spending which are not all front-line service positions. Even on the front line, there are opportunities for management and supervisory experience which are transferable, high demand skills.

A further point should be mentioned. Although the available data do not indicate the opportunities for entrepreneurial endeavor, there would seem to be a relative abundance of opportunity for small business development based on tourism spending. As the BBER wage study shows, the proprietor incomes derived from tourism based entrepreneurship provide above average wages for the business owners. These small successful businesses provide lucrative and satisfying work for the owners.

Research into the tourism employment debate should be refocused. It is apparent that concerns about the quality of these jobs are true in some cases. However, it is believed that tourism is a valuable component of Montana's economy. This study involved the jobs and wages generated by the non-resident travelers to Montana. A future study should look at the contribution of both resident and nonresident travel. In addition, further research should be directed toward assessing the value of entry level tourism jobs in terms of overall career opportunities. Research could also be directed toward identifying strategies for job enhancement and improvement within the field of tourism. Finally, research should be conducted to identify preferred alternatives for a healthy and sustainable Montana economy, and the role that tourism should play in attaining that goal.

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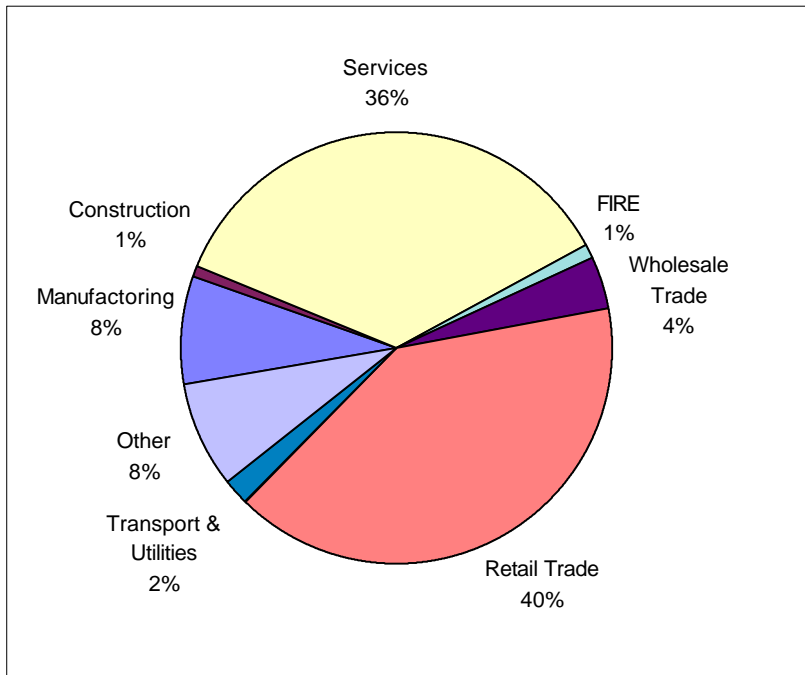
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**Table 1: Nonresident Travel Jobs by Industrial Sector in 1993, ITRR, Montana Dept. of Labor and industry, and The U.S. Dept. of Commerce.**

Major Sector	Distribution of Jobs that Support Nonresident Travel	Average Wages Per Job Reported by REIS	Avg. Hourly Wage - MT Dept. of Labor
FARM	1%	\$12,412	
AG. SERVICES, FORESTRY	0%	\$12,052	
MINING			\$15.25
METAL MINING	0%	\$37,840	\$15.26
Coal Mining	0%	\$47,210	\$20.53
OIL & GAS	0%	\$32,638	\$11.99
NONMETALIC	0%	\$34,332	\$15.05
CONSTRUCTION	1%	\$23,960	\$15.32
MANUFACTURING			\$12.40
NONDURABLE	5%	\$25,659	\$13.18
DURABLE	3%	\$25,297	\$12.06
TRANSPORT & TRADE	2%	\$31,771	\$14.25
Wholesale Trade	4%	\$24,303	\$10.08
Retail Trade			\$6.88
Building Materials & Gard	1%	\$17,829	\$8.52
General Merchandise Store	3%	\$12,312	\$6.86
Food Stores	2%	\$13,469	\$7.64
Automotive Dealers & Serv	3%	\$18,441	\$8.33
Apparel & Accessory Store	2%	\$10,046	\$5.87
Furniture & Home Furnishi	0%	\$16,834	\$9.82
Eating & Drinking	24%	\$8,618	\$5.18
Miscellaneous Retail	5%	\$12,270	\$6.92
FIRE	1%	\$23,721	\$9.19
SERVICES			\$9.00
Hotels And Lodging Places	24%	\$10,975	\$6.69
PERSONAL SERVICES	1%	\$12,571	\$7.02
BUSINESS	3%	\$13,122	\$7.22
AUTOMOTIVE	2%	\$15,982	\$9.55
MISC. REPAIR	0%	\$19,642	\$9.55
Motion Pictures	0%	\$12,529	\$7.21
AMUSEMENT & REC.	4%	\$21,076	\$7.21
MEMBERSHIP	0%	\$13,471	\$8.60
HEALTH SERVICES	1%	\$22,866	\$9.87
Legal Services	0%	\$29,242	\$11.46
EDUCATIONAL	0%	\$14,223	
SOCIAL SERVICES	0%	\$11,156	\$7.09
PROFESSIONAL	1%	\$28,786	\$13.70
GOVERNMENT			
STATE AND LOCAL GOV.	4%	\$19,468	
FEDERAL CIVILIAN	1%	\$32,310	
Federal Government - Mili	0%	\$15,933	
OTHER	0%	\$23,109	
All Tourism Jobs		\$14,670	\$7.56
All Private NonAg. Jobs		\$19,467	\$9.73

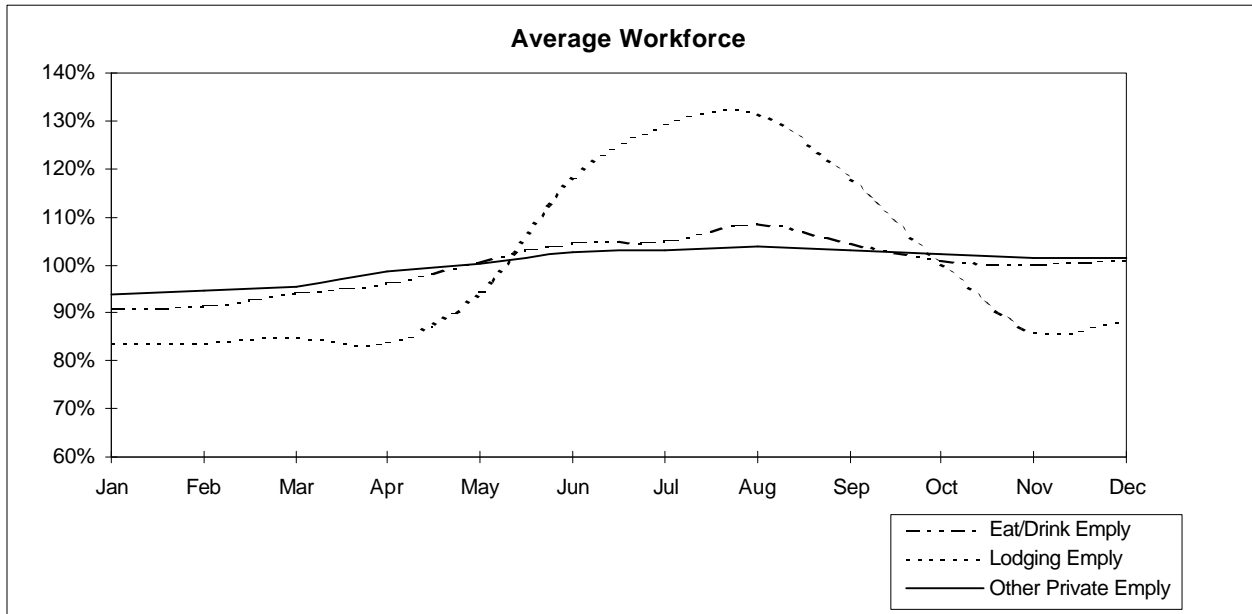


**Figure 1: Montana Jobs Supported by Tourism illustrated in The Major Industrial Sectors\***

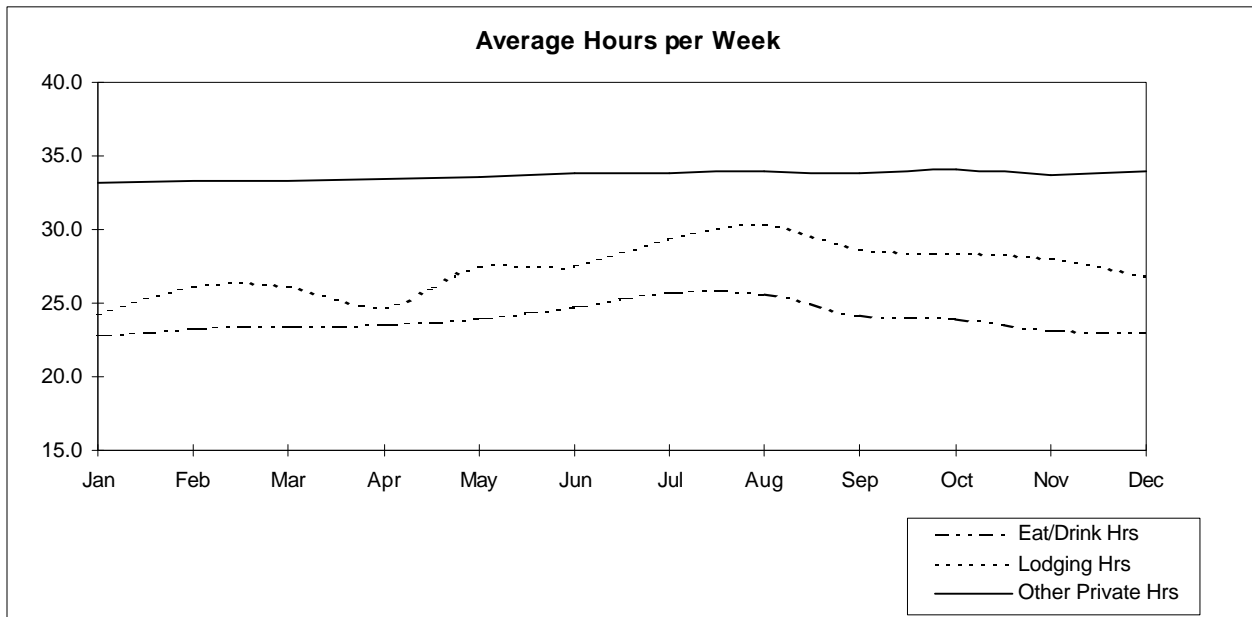


\*Data for this chart were generated on IMPLAN with the 1993 Nonresident Travel Study economic data (Institute for Tourism and Recreation Research, The University of Montana)

**Figure 2: Percent of Average Annual Workers Employed Each Month in 1993, Montana Dept. of Labor and Industry**



**Figure 3: Average Hours Worked each Week in 1993, Montana Dept. of Labor and Industry**



**Table 2: Comparisons of Wages between Tourism and other types of Occupations - based on the MT Dept. of Labor and Industry, Wages in Montana's Private Sector in 1993.**

Tourism Type Occupations	Avg. Hourly Wage - MT Dept. of Labor	Other Common Occupations	Avg. Hourly Wage - MT Dept. of Labor
Airplane Pilot, Commercial	\$21.88	Engineer, Electrical	\$20.08
Director, Museum-or-Zoo	\$16.87	Controller	\$16.92
Wholesaler	\$14.40	Electrician	\$14.04
Area Supervisor, Retail Chain Store	\$13.51	Engineer, Locomotive	\$13.98
Manager, Merchandise	\$13.18	Miner	\$12.81
Manager, Recreation Facility	\$12.12	Manager, Office *	\$11.85
Manager, Retail Store	\$11.14	Millwright	\$11.19
Manager, Casino	\$10.71	Welder, Combination	\$11.19
Art Director	\$10.18	Logger, All Around	\$10.55
Manager, Automobile Service Station *	\$10.14	Machinist, General	\$10.27
Manager, Lodging Facilities	\$10.08	Auto Body Repairer *	\$10.16
Mechanic, Automobile *	\$9.86	Administrative Assistant	\$9.79
Automobile Repair-Service Estimator	\$9.63	Meat Cutter	\$9.65
Coin-Machine-Service Repairer	\$9.38	Nurse, Licensed Practical	\$9.65
Tow Truck Operator	\$8.60	Sawmill Worker *	\$9.18
Electric-Golf-Cart Repairer	\$8.32	Bookkeeper *	\$8.25
Airport Utility Worker	\$8.11	Dental Assistant	\$8.10
Travel Agent	\$7.86	Computer Operator	\$7.83
Chef, Restaurant/Hotel *	\$7.58	Delivery, Merchandise *	\$7.70
Tire Repairer	\$7.34	Roustabout	\$7.64
Manager, Fast Food Services	\$7.16	Secretary *	\$7.54
Bus Driver *	\$6.87	Stock Clerk	\$7.40
Salesperson, General Merchandise *	\$6.79	Data Entry Operator	\$7.14
Sales Clerk, Food	\$6.45	Laborer, Machine Shop	\$6.91
Manager, Theater	\$6.15	Teacher, Preschool	\$6.89
Cook *	\$6.06	Assembler, Production *	\$6.66
Announcer	\$5.87	Production Machine Tender *	\$6.46
Photofinishing Laboratory Worker	\$5.82	Teller, General	\$6.44
Bartender *	\$5.63	Security Guard	\$6.40
Service Station Attendant*	\$5.63	Cashier-Checker	\$6.39
Lot Attendant	\$5.56	Hair Stylist	\$6.39
Cashier	\$5.54	Woodworking Shop Hand	\$6.32
Gambling Dealer *	\$5.49	Janitor	\$6.16
Dude Wrangler	\$5.43	Survey Worker	\$6.04
Cashier, Gambling	\$5.38	Nurse Assistant	\$6.03
Hotel Clerk	\$5.37	Supervisor, Laundry	\$5.96
Porter, Baggage *	\$5.24	Telephone Operator	\$5.90
Recreation Facility Attendant	\$5.16	Cut-Off Saw Operator	\$5.87
Automobile Rental Clerk	\$5.08	Designer, Floral	\$5.86
Keno Writer	\$4.98	Butcher, All-Around	\$5.71
Golf-Range Attendant	\$4.94	File Clerk II	\$5.66
Cleaner, Transportation Vehicles	\$4.86	Dry Cleaner	\$5.63
Attendant, Lodging Facility *	\$4.83	Messenger, Copy *	\$5.61
Salesperson, Sporting Goods	\$4.82	Lubrication Servicer	\$5.58
Taxi Driver *	\$4.80	Cleaner, Commercial or Institutional *	\$5.54
Cleaner, Housekeeping	\$4.49	Telephone Solicitor *	\$5.34
Fast-Food Worker	\$4.49	Sewing Machine Operator *	\$5.27
Waiter/Waitress *	\$4.47	Day Care / Child Care Worker	\$5.18
Dining Room Attendant	\$4.37	Animal Caretaker	\$4.94
Ticket Seller	\$4.30	Nanny	\$4.61
Caddie *	\$4.25	Bagger, Grocery Packer	\$4.57

\* Workers in these jobs typically receive some nonhourly compensation such as tips or commission  
 \*THIS TABLE SHOULD ONLY BE USED TO SHOW THAT THERE ARE TOURISM JOBS AT ALL WAGE LEVELS JUST LIKE THERE ARE OTHER JOBS AT ALL WAGE LEVELS.

**Table 3: The Most Common Montana Jobs and Wages (MT Dept. of Labor and Industry, 1993)**

Most Common Wage Jobs by rank order of Occurance	Avg. Hourly Wage - MT Dept. of Labor	
Sales Person, General Merchandise *	\$6.79	#
Cleaner, Commercial or Institutional *	\$5.54	#
Waiter / Waitress *	\$4.47	#
Fast-Food Workers	\$4.49	#
Nurse, General Duty	\$15.39	
Cashier-Checker	\$6.39	#
Nurse Assistant	\$6.03	
Bookkeeper *	\$8.25	#
Clerk, General Office	\$7.02	
Sales Representative, General Mdse *	\$10.38	#
Manager, Office *	\$11.85	
Cashier	\$5.54	#
Secretary *	\$7.54	#
Sales Clerk, Food	\$6.45	#
Manager, Retail Store *	\$11.14	#
Receptionist *	\$6.44	#
Nurse, Licensed Practical	\$9.65	
Teller, General	\$6.44	#
Driver, Sales Route *	\$6.87	#
Kitchen Helper *	\$4.80	#
Truck Driver, Heavy *	\$11.03	#
Mechanic, Maintenance	\$12.34	
Operating Engineer	\$14.34	
Cook, Short Order	\$5.93	#
Assembler, Production *	\$6.66	
Accounting Clerk	\$7.67	#
Janitor *	\$6.19	#
Laborer, Machine Shop	\$6.91	
Bartender	\$5.63	#
Accountant *	\$13.50	#
Shipping and Receiving Clerk *	\$6.57	#
Mechanic, Automobile *	\$9.86	#
Stores Laborer	\$7.39	#
Mechanic, Diesel *	\$10.86	
Truck Driver, Tractor Trailer *	\$10.40	#
Packager, Hand	\$6.87	
Maintenance Repairer, Building	\$9.07	#
Laundry Worker I	\$5.63	#
Manager, Employment *	\$12.59	
Caseworker	\$10.40	
Sewing Machine Operator *	\$5.27	
Truck Driver, Light	\$7.37	#
Day Care / Child Care Worker	\$5.18	#
Manager, Sales *	\$14.69	#
Clerk-Typist	\$6.93	
Cook *	\$6.06	#
Computer Operator	\$7.83	
Bus Driver *	\$6.87	#
Counter Attendant, Lunchroom/Coffee Shop	\$4.38	#
Stock Clerk	\$7.40	#
Auto Body Repairer *	\$10.16	
Hotel Clerk	\$5.37	#
Material Handler	\$6.90	
Loan Officer *	\$12.08	
Track Repairer	\$9.93	
Vice President	\$21.68	
Administrative Assistant	\$9.79	
Delivery, Merchandise *	\$7.70	#
Tire Repairer	\$7.34	#
Manager, Fast Food Services	\$7.16	#

\*tips or commission common

# This type of job is, at least partially, supported by Tourism