

An Analysis of the California Travel Industry and other Export-oriented Sectors

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**A Joint Marketing Venture of the California Travel & Tourism Commission
and the California Business, Transportation and Housing Agency, Division of Tourism**

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AN ANALYSIS OF THE CALIFORNIA TRAVEL INDUSTRY AND OTHER EXPORT-ORIENTED SECTORS

This report assesses the relative importance of the travel industry and other *export-oriented industries* in California's fifty-eight counties and twelve tourism regions. Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, manufacturing, and resource-extractive industries such as forestry and mining are the purest examples of export-oriented industries. In addition, many professional services, such as architecture, engineering and software publishing, have significant export components. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. In this way, the travel industry injects money into the local economy, as do the exports of other industries.

Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength – in part because they generate income that contributes to the development of other local services and amenities. Such industries characterize the “comparative advantage” of the local economy within larger regional, national and global markets.

SELECTED INDUSTRY SECTORS

For the purposes of this report, nine industry sectors that are found in all regions of the state will be compared.¹ Three of these industry sectors are primarily export-oriented:

- **Agriculture.** This industry includes farm employees, crop production (NAICS 111), animal production (NAICS 112), agricultural support services (NAICS 1151 & 1152) and the manufacture or processing of food (NAICS 311) and beverage products (NAICS 312). Both wine production and farm proprietors are included in this category.
- **Manufacturing.** The manufacturing sector is comprised of a number of different industries. The largest manufacturing industries within the state are computer and electronics (NAICS 334), fabricated metals (NAICS 332) and transportation equipment (NAICS 336). The manufacture of food and beverage products is not included in this sector for the purpose of this analysis. (They are included in agriculture.)
- **Travel.** A portion of the transportation, retail, leisure, and hospitality industries as estimated by Dean Runyan Associates.

Six other industry sectors are also included in this report. These service-oriented sectors serve both export and local/regional markets. The degree to which these sectors are export-oriented may vary substantially among regions. For example, in rural areas health care is usually primarily oriented to the local market. By contrast,

¹ One of California's major export industry, film production, is concentrated in Los Angeles county.

many urban areas have substantial medical specialization and research functions that attract external resources. However, the quantification of the export components of these sectors is beyond the scope of this analysis. The six industry sectors that can have significant export components are:

- **Transportation and warehousing.** NAICS sector 48-49 includes all air, water, rail and truck transportation as well as courier services and warehousing. A small portion of this sector (less than 10%) is also included in the travel category.
- **Information.** NAICS sector 51 includes publishing industries, motion picture and sound recording industries, broadcasting and telecommunications, and information/data processing services.
- **Finance & Insurance.** NAICS sector 52 includes financial institutions and insurance carriers.
- **Professional, technical and business services.** NAICS sector 54 includes legal, accounting, architectural, engineering, computer, consulting and other services.
- **Educational services.** NAICS sector 61 includes colleges, technical schools and training centers. Public institutions are not included for the purposes of this analysis.
- **Health care and social assistance.** NAICS 62 includes ambulatory services, hospitals, nursing and resident care facilities, and social assistance. Public institutions are not included for the purposes of this analysis.

The statewide total employment of these nine industries, as well as other industry sectors are shown in the table on the following page. In the body of the report, the estimated total employment and employment rank of these industries will be reported for each California tourism region. In some cases, the employment figures were estimated and are so designated. At the regional level, the estimates for all industries are reported and are also used to calculate other statistics. At the county level, there are many cases where industry employment data could not be reliably estimated and so is not reported.

TOTAL EMPLOYMENT AND EARNINGS

Total employment is the measure used in this report to compare industries and regions. Total employment includes employees that are paid wages or salaries and proprietors (self-employed). The major disadvantage of using employment as a basis of comparison is that it does not account for differences in payroll and earnings.² Relatively low wage industries, such as travel and agriculture, will thus compare more favorably than high wage industries, such as manufacturing and professional services than would be the case if payroll or earnings measures were used.

The primary reason for using total employment is related to the difficulty of measuring the agricultural sector in terms of payroll or earnings: A substantial share

² Earnings include wages and salaries, paid benefits and proprietor income. Statewide earnings for these industries are shown in the appendix.

of farm income is derived from government subsidies rather than payroll or earnings. Employment is thus a better indicator of the size of the agriculture industry relative to travel, the focus of this report. Secondly, it should be noted that the industry sectors have different shares of export markets. This is probably a more limiting factor than whether the industry comparison is made on the basis of employment or earnings.

California Total Employment, 2007

Industry Sector	Employment
Primary Export Industries	2,927
Agriculture	653
Manufacturing (less Agriculture)	1,346
*Travel	928
Industries with Export Components	6,020
Transportation and warehousing	585
Information	557
Finance and insurance	932
Prof., tech. and business services	1,749
Educational services	421
Health care and social assistance	1,775
Primarily Local/Regional Markets	11,161
Construction	1,261
Utilities	60
Wholesale trade	818
Retail trade	2,154
Real estate and rental and leasing	1,312
Management of companies and enterprises	219
Administrative and waste services	1,381
Other services, except public administration	1,237
Government and government enterprises	2,718
*Other & Statistical Adjustment	1,131
California Total	21,239

Source: Bureau of Economic Analysis and Dean Runyan Associates. Total employment includes payroll employees and proprietors. *Travel includes portions of transportation, retail trade and leisure & hospitality. These travel industry shares are not removed from the transportation and retail trade employment numbers reported here. They are accounted for in the "Other & Statistical Adjustment" category.

LOCATION QUOTIENT

The location quotient is an index that measures the relative concentration of an industry or sector in a region. In this report, the industry concentrations of the twelve tourism regions are compared to the state. Computationally, the location quotient (LQ) is equivalent to the following:

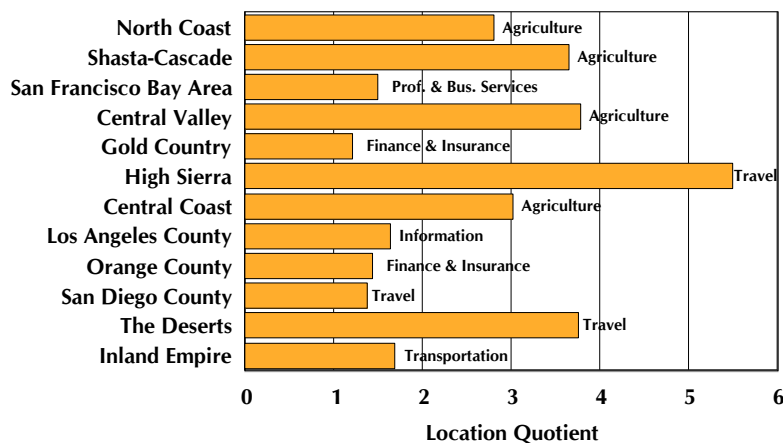
$$\frac{\text{Regional Industry Employment}}{\text{Regional Total Employment}} \bigg/ \frac{\text{State Industry Employment}}{\text{State Total Employment}}$$

- If $LQ > 1$, the concentration of the industry in the region is greater than that of the state.
- If $LQ = 1$, the concentration of the industry in the region is the same as the state.
- If $LQ < 1$, the concentration of the industry in the region is less than that of the state.

The location quotient thus provides a way to compare counties and regions with respect to a single industry, rather than comparing industries within a given geographic area. One advantage of the location quotient is that wage and earnings differentials among industries are less important. That is, the location quotients will generally be similar whether employment, payroll or earnings is used in the calculation. In addition, a relatively high location quotient can be an indication that a particular industry has a significant export component relative to another area.

The graph below compares the twelve California tourism regions in terms of the highest value location quotient for each industry. Note that agriculture and travel predominate in the less urbanized regions. Agriculture has the highest value in the Central Valley, while the location quotient for Travel is greatest in the High Sierra region. The leading location quotients for the more urbanized regions are of less magnitude – due to the greater diversity of these economies. The location quotient for the Information sector in Los Angeles County is a reflection of the presence of the motion picture and sound recording industries. The location quotient for Profession & Business Services in the San Francisco Bay Area is a reflection of the presence of the many technology businesses in that region.

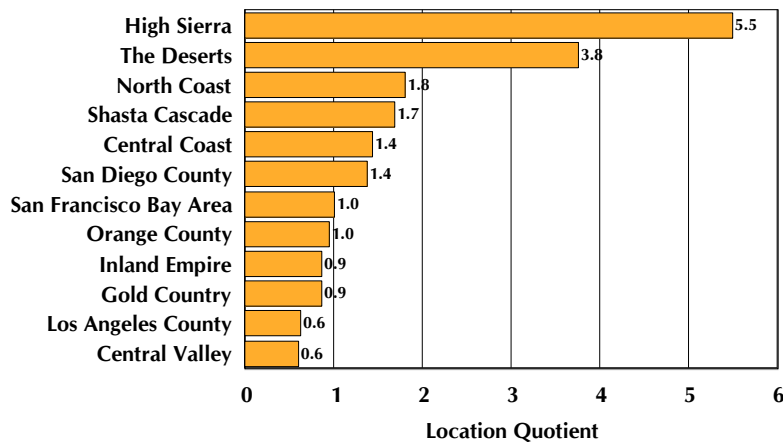
Highest Ranking Location Quotient of Nine Selected Industry Sectors by Tourism Region, 2007



Source: Location Quotients calculated by Dean Runyan Associates with source data from Bureau of Economic Analysis.

The graph below shows the location quotients for the travel industry in each of the twelve tourism regions. A value greater than “1” indicates an above average tourism industry concentration relative to California as a whole.

Travel Industry Location Quotients by Tourism Region, 2007



Source: Dean Runyan Associates

INTERPRETATION OF FINDINGS

There are data limitations and conceptual issues that bear upon the findings presented in this report.

- The employment figures are *estimates* from county level data. In many cases, the original source data was withheld due to disclosure rules. In such instances, the estimates were based on other data (e.g., estimates from other years, estimates from more detailed payroll data reported by the Bureau of Labor Statistics.)
- Many of the regional estimates reflect an aggregation of sub-county areas. These sub-county areas are themselves estimates.
- Only the travel and agriculture classifications meaningfully represent interrelated businesses that are reasonable comparable across regions. The other seven sectors are extremely broad and are sometimes not comparable across regions.
- Although the focus of this analysis is on *export-oriented* industries, many of the selected industry sectors contain businesses that are primarily oriented toward local markets.
- The industry rankings should be viewed as descriptive only. They do not imply that any particular industry is “more important” than another.

REGIONAL INDUSTRY ASSESSMENTS



The regional estimates are reported on pages 7 through 18 in alphabetical order.

Central Coast Industry Assessment

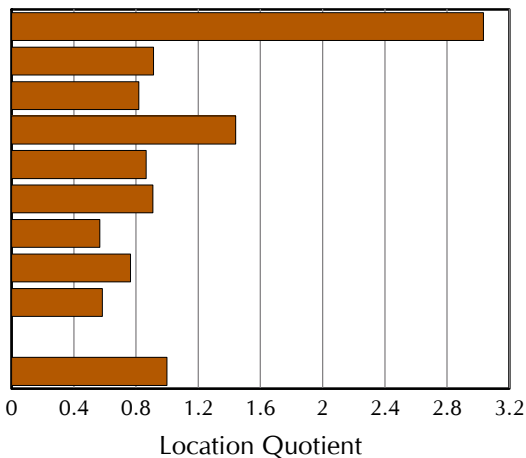
The Central Coast region includes all of Monterey, San Benito, San Luis Obispo, Santa Barbara and Ventura counties.

Industry	Employment	*Rank	Percent	Notes
Agriculture	105,250	1	9.3%	Estimate
Health Care	86,160	2	7.6%	
Prof. & Bus. Services	76,020	3	6.7%	
Travel	71,060	4	6.3%	
Manufacturing	62,240	5	5.5%	Estimate
Finance & Insurance	45,020	6	4.0%	
Transportation	17,400	7	1.5%	Estimate
Education	17,280	8	1.5%	
Information	17,270	9	1.5%	
Sub Total	497,690		44.1%	Estimate
Total Employment	1,129,030		100.0%	

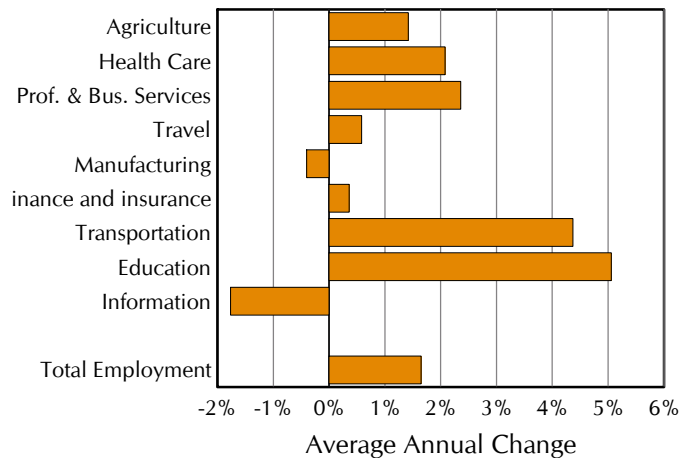
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Central Valley Industry Assessment

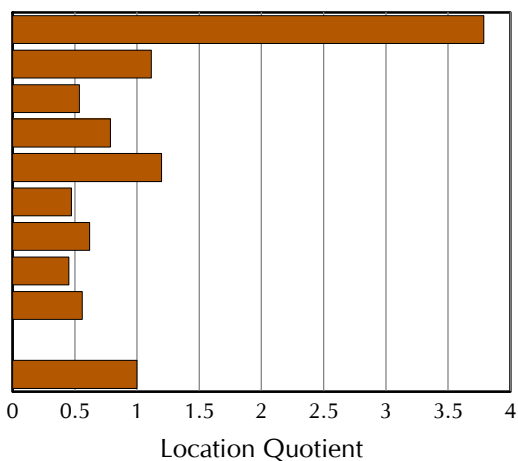
The Central Valley region includes all of Butte, Colusa, Glenn, Kings, Merced, San Joaquin, Stanislaus, Sutter, Yolo and Yuba counties, and parts of Contra Costa, Fresno, Kern, Madera, Placer, Solano, Tulare and Tuolumne counties.

Industry	Employment	*Rank	Percent	Notes
Agriculture	286,240	1	11.6%	Estimate
Health Care	229,570	2	9.3%	
Prof. & Bus. Services	109,050	3	4.4%	Estimate
Finance & Insurance	84,880	4	3.4%	
Transportation	80,040	5	3.3%	Estimate
Manufacturing	74,140	6	3.0%	Estimate
Travel	66,510	7	2.7%	
Information	29,200	8	1.2%	
Education	27,590	9	1.1%	
Sub Total	987,220		40.1%	Estimate
Total Employment	2,460,450		100.0%	

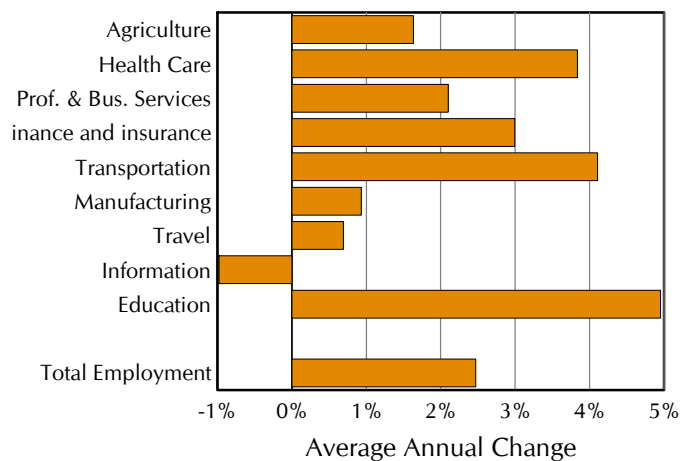
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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2004-2007**



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Gold Country Industry Assessment

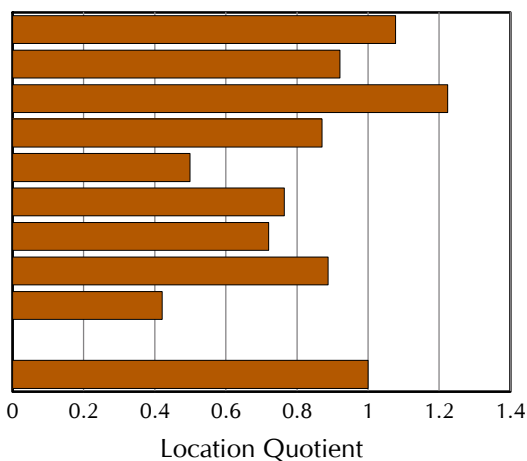
The Gold Country region includes all of Sacramento county and parts of Amador, Calaveras, El Dorado, Madera, Mariposa, Nevada and Placer counties.

Industry	Employment	*Rank	Percent	Notes
Health Care	91,050	1	9.0%	
Prof. & Bus. Services	76,670	2	7.6%	
Finance & Insurance	54,280	3	5.4%	Estimate
Travel	38,460	4	3.8%	
Manufacturing	32,160	5	3.2%	Estimate
Information	20,270	6	2.0%	Estimate
Transportation	19,820	7	2.0%	Estimate
Education	17,960	8	1.8%	Estimate
Agriculture	13,080	9	1.3%	Estimate
Sub Total	363,760		36.0%	Estimate
Total Employment	1,011,380		100.0%	

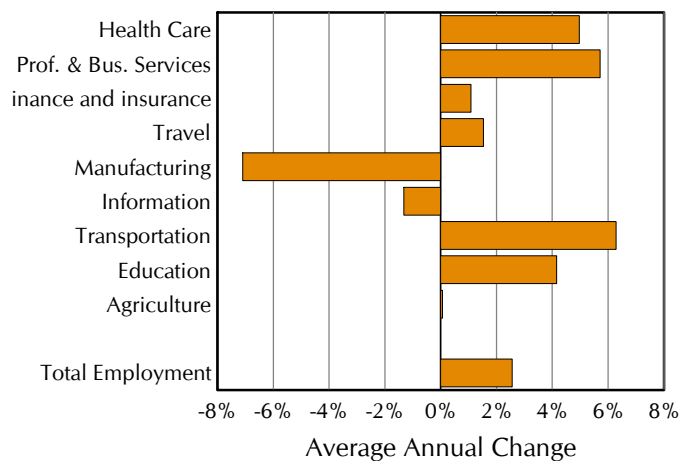
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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2004-2007**



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High Sierra Industry Assessment

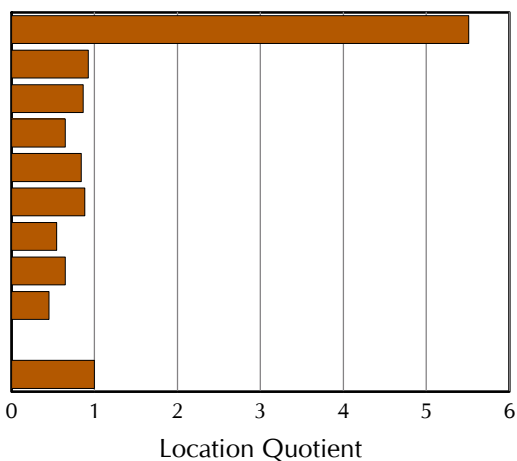
The High Sierra region includes all of Alpine, Mono and Sierra counties, and parts of Amador, Calaveras, El Dorado, Fresno, Inyo, Mariposa, Nevada, Placer, Tulare and Tuolumne counties.

Industry	Employment	*Rank	Percent	Notes
Travel	27,660	1	24.1%	
Health Care	8,890	2	7.7%	Estimate
Prof. & Bus. Services	8,160	3	7.1%	Estimate
Manufacturing	4,740	4	4.1%	Estimate
Finance & Insurance	4,230	5	3.7%	Estimate
Agriculture	3,120	6	2.7%	Estimate
Transportation	1,700	7	1.5%	Estimate
Education	1,490	8	1.3%	Estimate
Information	1,360	9	1.2%	Estimate
Sub Total	61,340		53.4%	Estimate
Total Employment	114,930		100.0%	

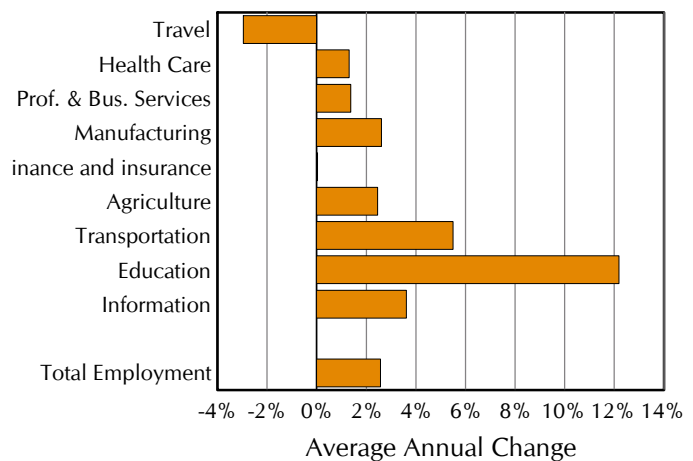
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



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Inland Empire Industry Assessment

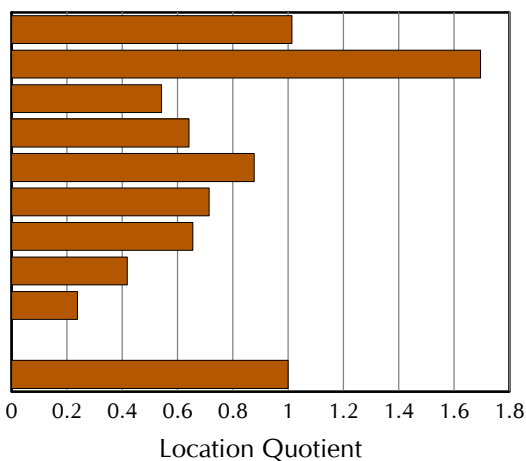
The Inland Empire Region includes parts of Riverside and San Bernardino counties.

Industry	Employment	*Rank	Percent	Notes
Health Care	127,910	1	8.5%	
Transportation	69,600	2	4.6%	
Prof. & Bus. Services	67,430	3	4.5%	
Manufacturing	61,690	4	4.1%	
Travel	57,870	5	3.8%	
Finance & Insurance	47,290	6	3.1%	
Education	19,780	7	1.3%	
Information	16,540	8	1.1%	
Agriculture	11,060	9	0.7%	
Sub Total	479,170		31.7%	
Total Employment	1,509,230		100.0%	

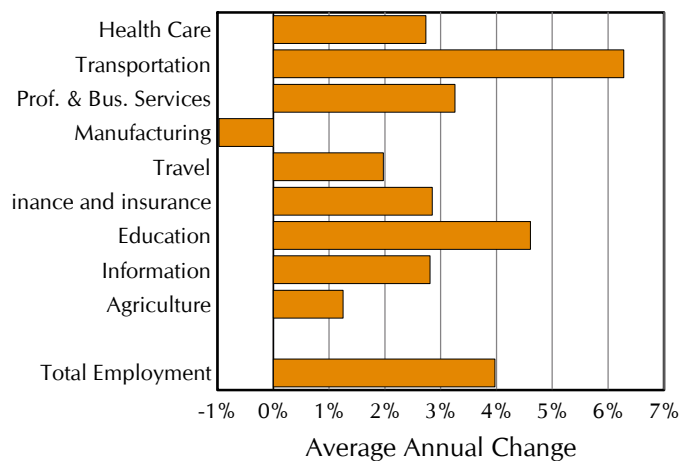
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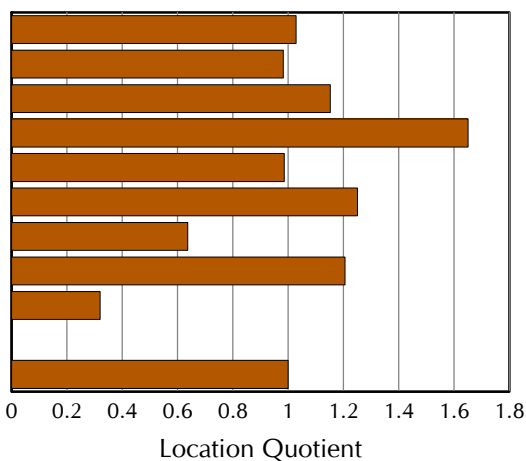
Los Angeles County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Health Care	502,650	1	8.6%	
Prof. & Bus. Services	473,340	2	8.1%	
Manufacturing	428,950	3	7.3%	
Information	253,120	4	4.3%	
Finance & Insurance	252,990	5	4.3%	
Transportation	198,930	6	3.4%	
Travel	162,570	7	2.8%	
Education	141,080	8	2.4%	
Agriculture	57,450	9	1.0%	
Sub Total	2,471,060		42.3%	
Total Employment	5,846,140		100.0%	

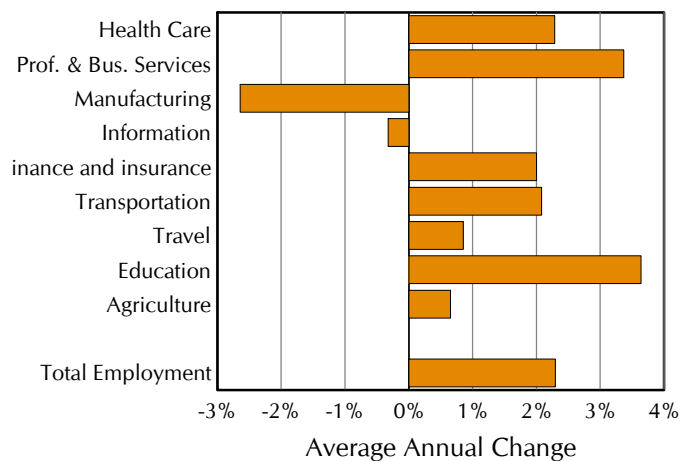
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates.
 Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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North Coast Industry Assessment

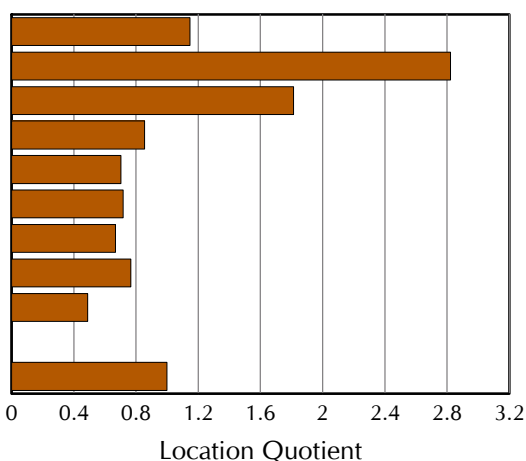
The North Coast Region includes Del Norte, Humboldt, Lake, Mendocino, Napa and Sonoma counties.

Industry	Employment	*Rank	Percent	Notes
Health Care	51,700	1	9.6%	
Agriculture	46,730	2	8.7%	Estimate
Travel	42,690	3	7.9%	
Prof. & Bus. Services	37,980	4	7.0%	
Manufacturing	24,150	5	4.5%	Estimate
Finance & Insurance	16,960	6	3.1%	
Transportation	9,790	7	1.8%	Estimate
Education	8,260	8	1.5%	
Information	6,920	9	1.3%	
Sub Total	245,190		45.5%	Estimate
Total Employment	539,140		100.0%	

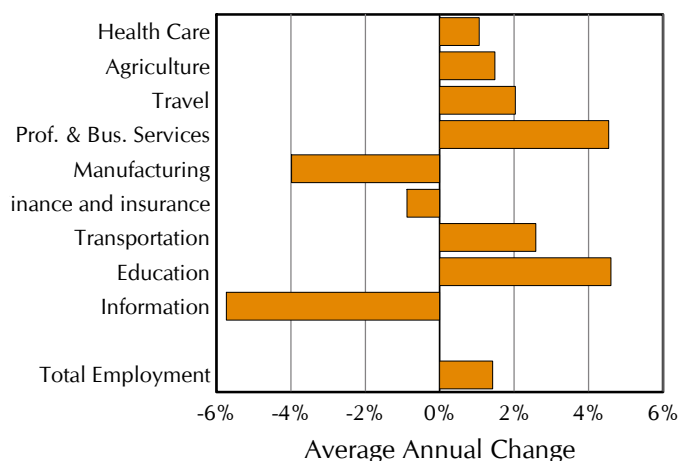
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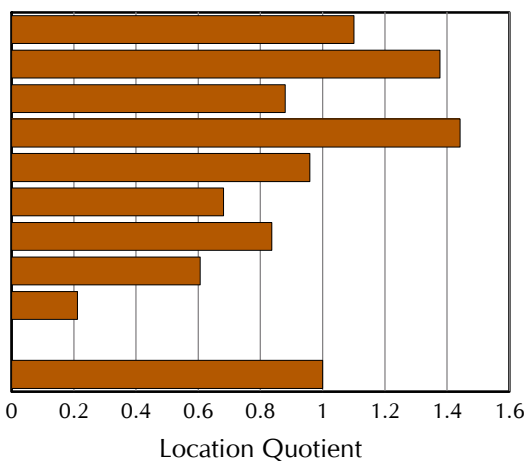
Orange County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	185,690	1	9.1%	
Manufacturing	179,750	2	8.8%	
Health Care	150,680	3	7.4%	
Finance & Insurance	129,640	4	6.3%	
Travel	85,840	5	4.2%	
Information	36,620	6	1.8%	
Education	34,280	7	1.7%	
Transportation	33,810	8	1.6%	
Agriculture	13,320	9	0.6%	
Sub Total	849,640		41.5%	
Total Employment	2,049,270		100.0%	

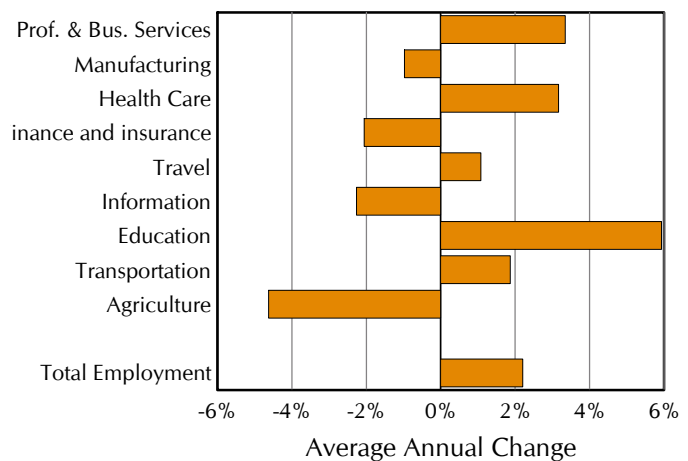
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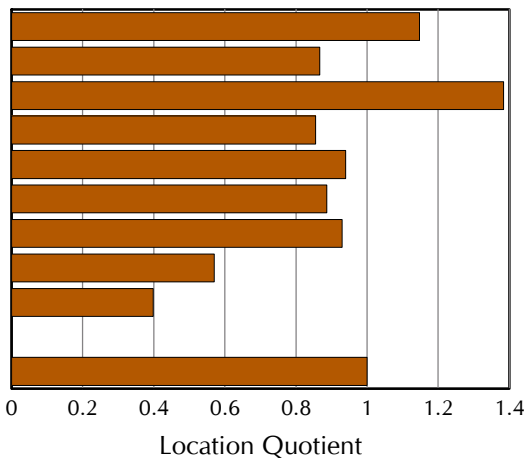
San Diego County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	181,910	1	9.5%	
Health Care	139,440	2	7.2%	
Travel	116,340	3	6.0%	
Manufacturing	104,840	4	5.4%	
Finance & Insurance	79,310	5	4.1%	
Information	44,730	6	2.3%	
Education	35,800	7	1.9%	
Transportation	29,860	8	1.6%	
Agriculture	23,540	9	1.2%	
Sub Total	755,770		39.3%	
Total Employment	1,924,830		100.0%	

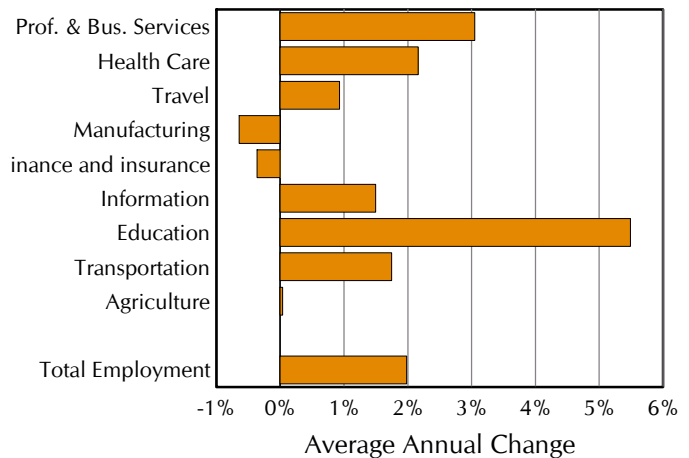
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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San Francisco Bay Area Industry Assessment

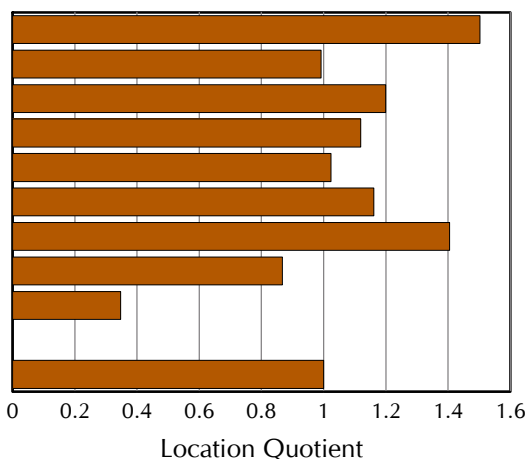
The San Francisco Bay Area includes all of Alameda, Marin, San Francisco, San Mateo, Santa Clara and Santa Cruz counties, and parts of Contra Costa and Solano counties.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	507,720	1	12.4%	
Health Care	340,170	2	8.3%	
Manufacturing	313,520	3	7.6%	
Finance & Insurance	201,480	4	4.9%	
Travel	183,410	5	4.5%	
Information	125,000	6	3.0%	
Education	115,370	7	2.8%	
Transportation	96,810	8	2.4%	Estimate
Agriculture	43,770	9	1.1%	Estimate
Sub Total	1,927,250		47.0%	Estimate
Total Employment	4,103,750		100.0%	

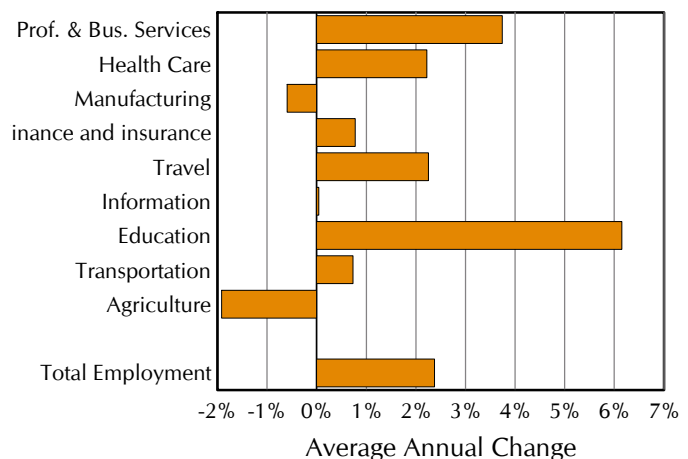
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Shasta-Cascade Industry Assessment

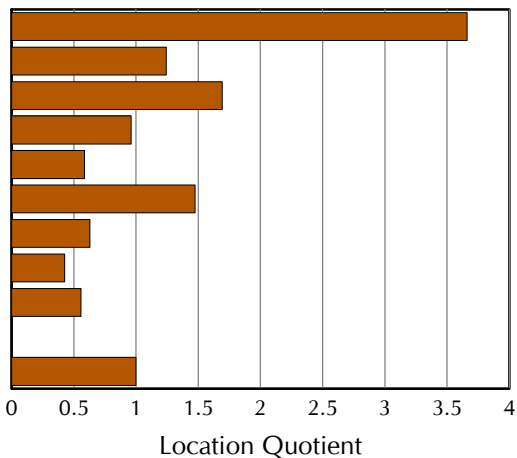
The Shasta-Cascade Region includes Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama and Trinity counties.

Industry	Employment	*Rank	Percent	Notes
Agriculture	20,200	1	11.2%	Estimate
Health Care	18,650	2	10.4%	
Travel	13,290	3	7.4%	
Manufacturing	10,990	4	6.1%	Estimate
Prof. & Bus. Services	8,650	5	4.8%	
Transportation	7,210	6	4.0%	
Finance & Insurance	4,970	7	2.8%	
Information	2,000	8	1.1%	
Education	2,000	9	1.1%	
Sub Total	87,950		49.0%	Estimate
Total Employment	179,560		100.0%	

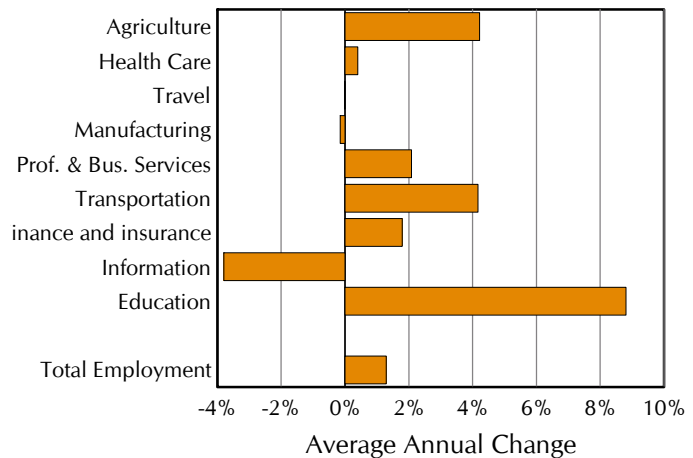
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

The Deserts Industry Assessment

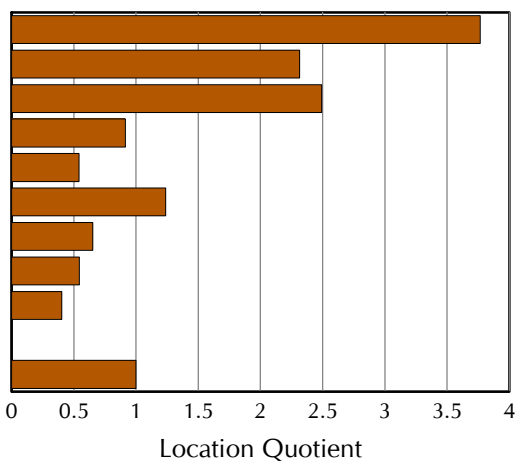
The Deserts Region includes all of Imperial county and parts of Inyo, Kern, Riverside and San Bernardino counties.

Industry	Employment	*Rank	Percent	Notes
Travel	62,160	1	16.5%	
Manufacturing	55,660	2	14.7%	Estimate
Agriculture	28,930	3	7.7%	Estimate
Health Care	28,860	4	7.6%	
Prof. & Bus. Services	16,830	5	4.5%	Estimate
Transportation	12,720	6	3.4%	
Finance & Insurance	10,790	7	2.9%	
Education	4,120	8	1.1%	
Information	3,990	9	1.1%	
Sub Total	224,070		59.3%	Estimate
Total Employment	377,790		100.0%	

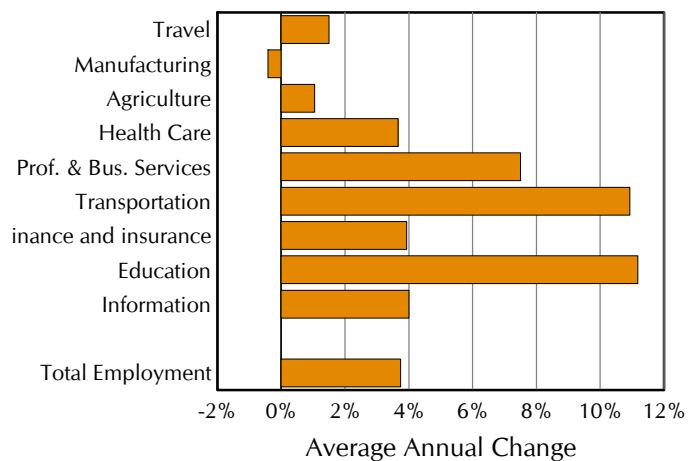
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

COUNTY INDUSTRY ASSESSMENTS



The county estimates are reported on pages 20 through 77 in alphabetical order.

Alameda County Industry Assessment

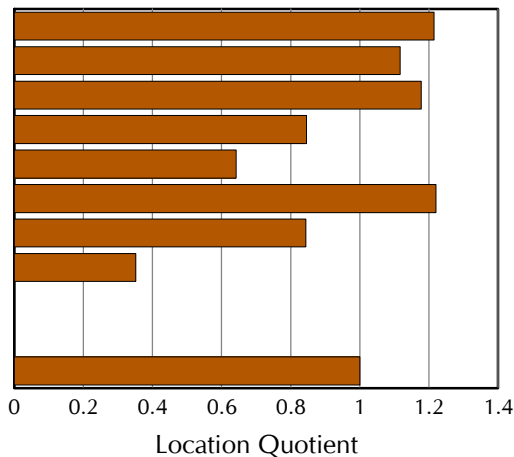
Alameda County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	91,840	1	10.0%	
Health Care	85,710	2	9.3%	
Manufacturing	68,880	3	7.5%	
Finance and insurance	34,040	4	3.7%	
Travel	25,750	5	2.8%	
Education	22,420	6	2.4%	
Information	20,320	7	2.2%	
Agriculture	9,930	8	1.1%	
Transportation				n.a., about 30,000 employees
Sub Total				n.a., about 390,000 employees
Total Employment	918,290		100.0%	

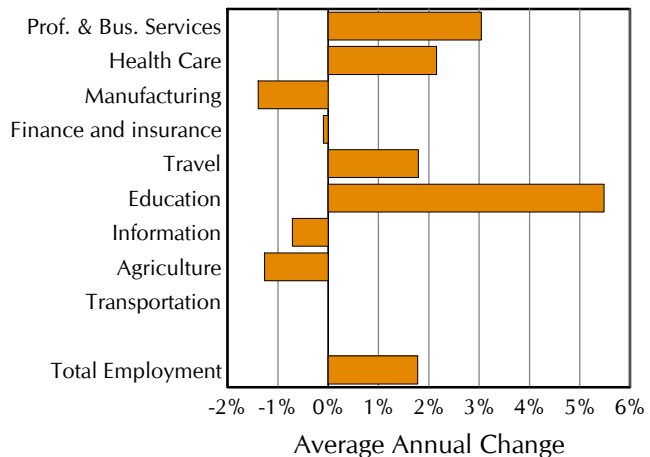
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Alpine County Industry Assessment

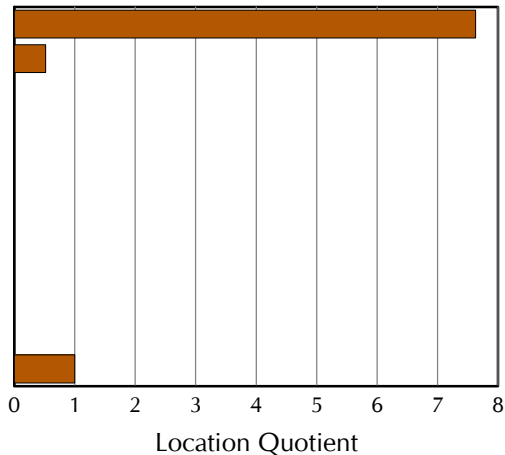
Alpine County is in the High Sierra Region.

Industry	Employment	*Rank	Percent	Notes
Travel	380	1	33.6%	
Agriculture	20	2	1.8%	
Education				n.a.
Finance and insurance				n.a.
Health Care				n.a., about 50 employees
Information				n.a.
Manufacturing				n.a.
Prof. & Bus. Services				n.a., about 40 employees
Transportation				n.a.
Sub Total				n.a., about 500 employees
Total Employment	1,130		100.0%	

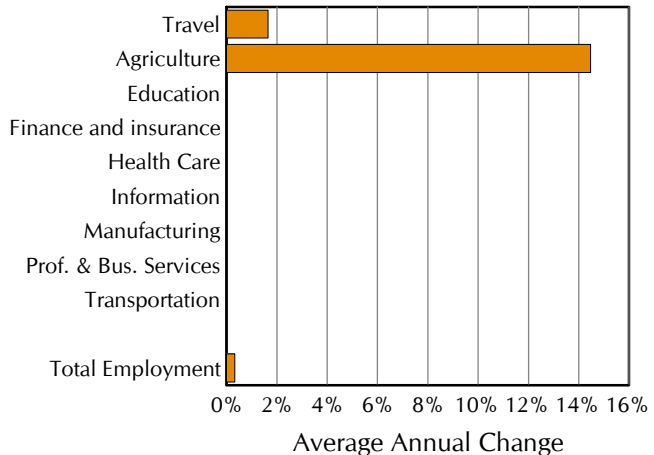
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Amador County Industry Assessment

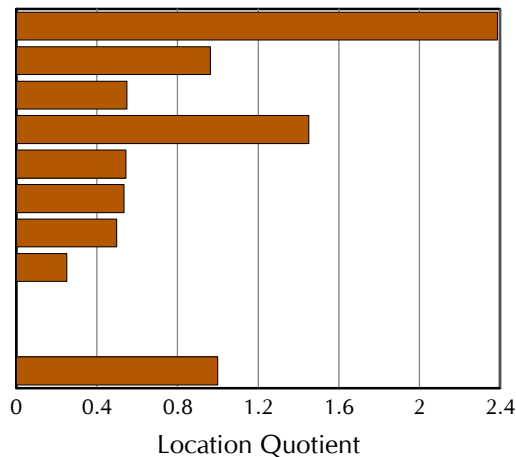
Amador County is in the Gold Country and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Travel	2,100	1	10.4%	
Health Care	1,620	2	8.0%	
Prof. & Bus. Services	910	3	4.5%	
Agriculture	900	4	4.5%	Estimate
Manufacturing	700	5	3.5%	Estimate
Finance and insurance	470	6	2.3%	
Information	260	7	1.3%	
Education	100	8	0.5%	
Transportation				n.a., about 100 employees
Sub Total				n.a., about 7,200 employees
Total Employment	20,180		100.0%	

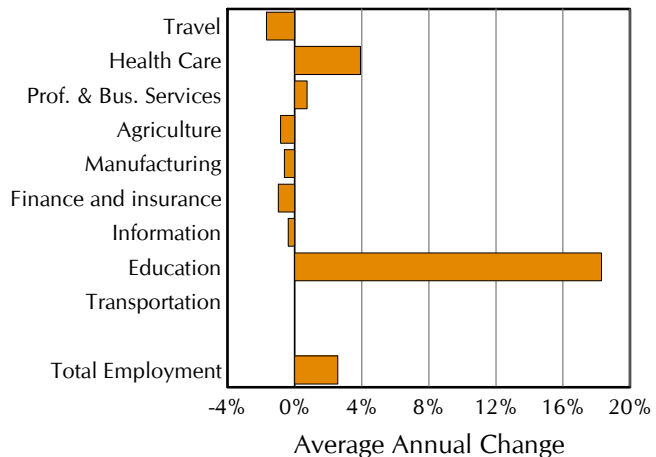
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Butte County Industry Assessment

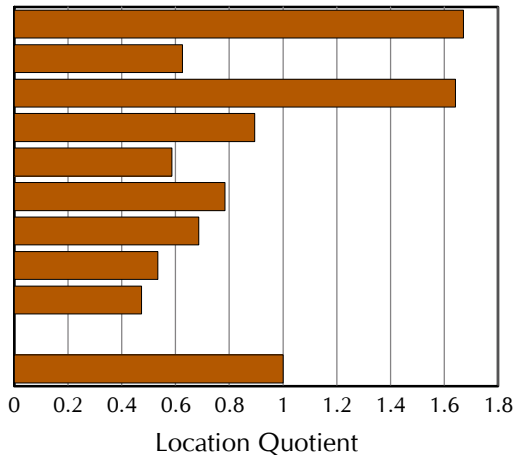
Butte County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	15,340	1	14.0%	
Prof. & Bus. Services	5,660	2	5.2%	
Agriculture	5,540	3	5.0%	
Finance and insurance	4,310	4	3.9%	
Manufacturing	4,100	5	3.7%	Estimate
Travel	3,760	6	3.4%	
Transportation	2,050	7	1.9%	
Information	1,540	8	1.4%	
Education	1,040	9	0.9%	
Sub Total				n.a., about 43,300 employees
Total Employment	109,820		100.0%	

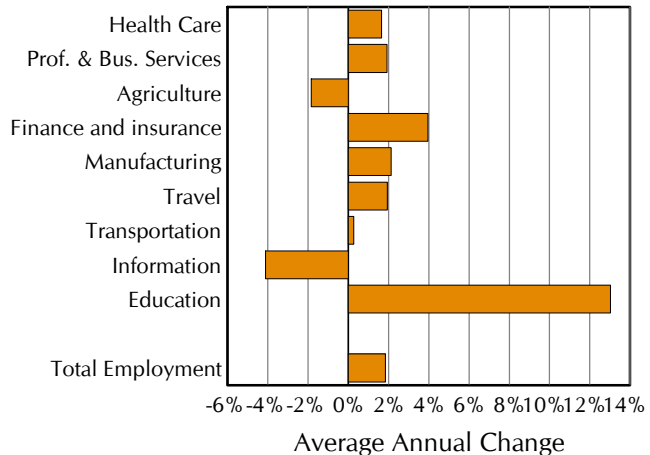
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Calaveras County Industry Assessment

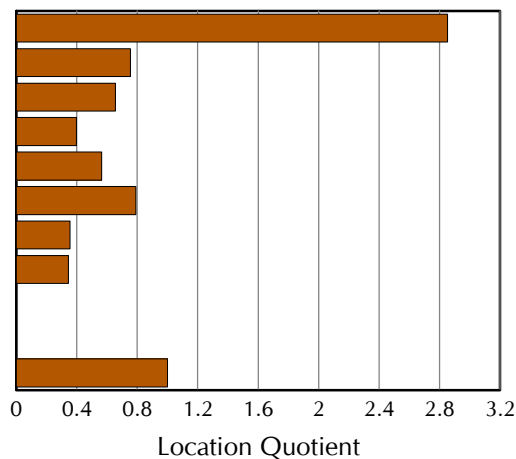
Calaveras County is in the Gold Country and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Travel	2,330	1	12.5%	
Prof. & Bus. Services	1,160	2	6.2%	
Health Care	1,020	3	5.5%	
Manufacturing	470	4	2.5%	
Finance and insurance	460	5	2.5%	
Transportation	400	6	2.1%	
Information	170	7	0.9%	
Education	130	8	0.7%	
Agriculture				n.a., about 1,000 employees
Sub Total				n.a., about 7,300 employees
Total Employment	18,680		100.0%	

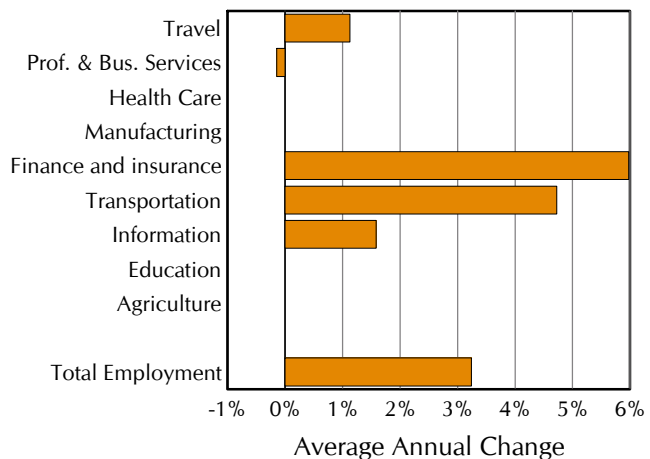
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Colusa County Industry Assessment

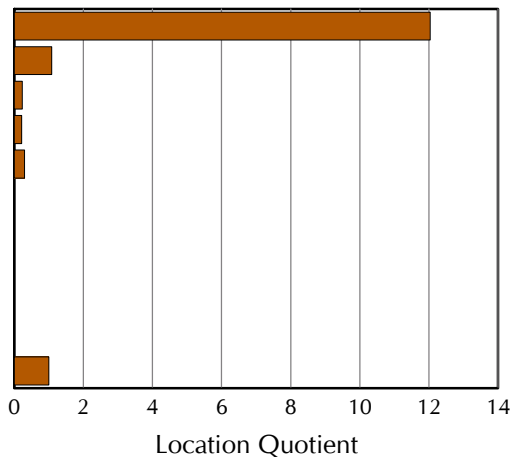
Colusa County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	4,200	1	37.0%	Estimate
Travel	540	2	4.8%	
Prof. & Bus. Services	220	3	1.9%	
Manufacturing	160	4	1.4%	
Finance and insurance	150	5	1.3%	
Education				n.a.
Health Care				n.a.
Information				n.a.
Transportation				n.a.
Sub Total				n.a., about 6,200 employees
Total Employment	11,360		100.0%	

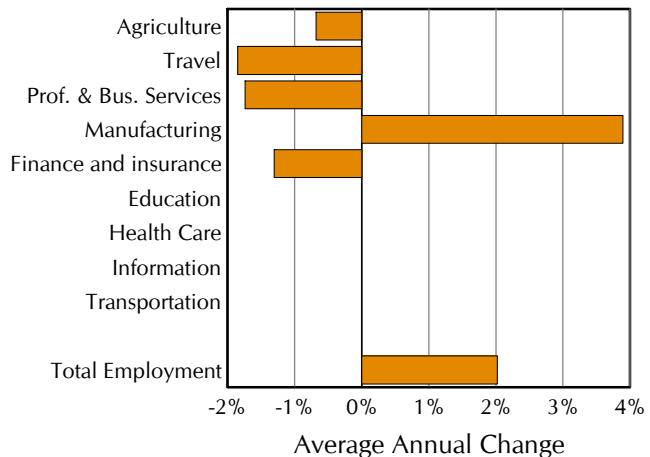
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Contra Costa County Industry Assessment

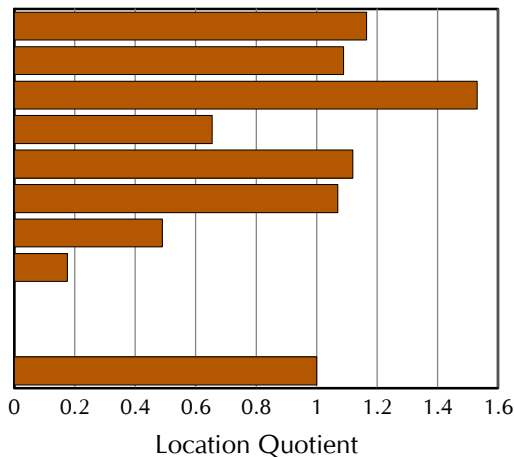
Contra Costa County is in the San Francisco Bay Area and Central Valley Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	50,160	1	9.7%	
Prof. & Bus. Services	46,170	2	9.0%	
Finance and insurance	34,570	3	6.7%	
Manufacturing	21,480	4	4.2%	
Information	15,110	5	2.9%	
Education	11,030	6	2.1%	
Travel	11,010	7	2.1%	
Agriculture	2,780	8	0.5%	
Transportation				n.a., about 10,000 employees
Sub Total				n.a., about 200,000 employees
Total Employment	514,930		100.0%	

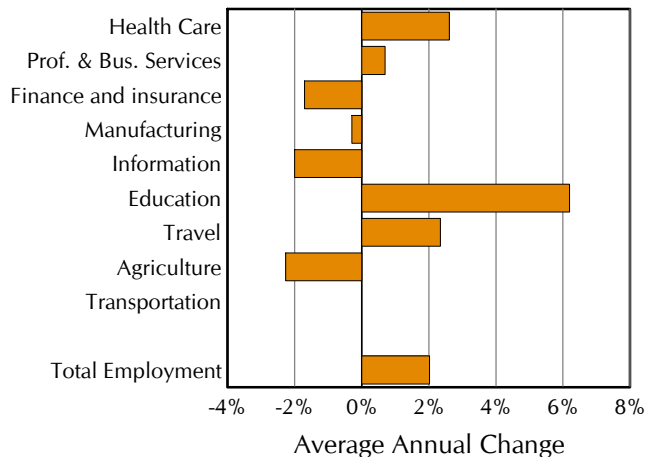
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Del Norte County Industry Assessment

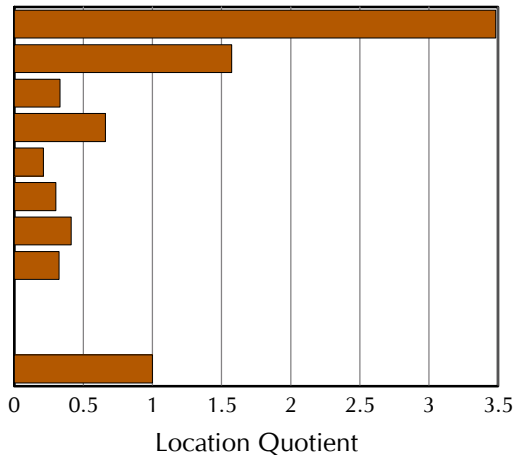
Del Norte County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Travel	1,760	1	15.2%	
Health Care	1,520	2	13.1%	
Prof. & Bus. Services	320	3	2.8%	
Transportation	210	4	1.8%	
Manufacturing	160	5	1.4%	
Finance and insurance	150	6	1.3%	
Information	120	7	1.0%	
Education	80	8	0.7%	
Agriculture				n.a., about 1,000 employees
Sub Total				n.a., about 5,500 employees
Total Employment	11,590		100.0%	

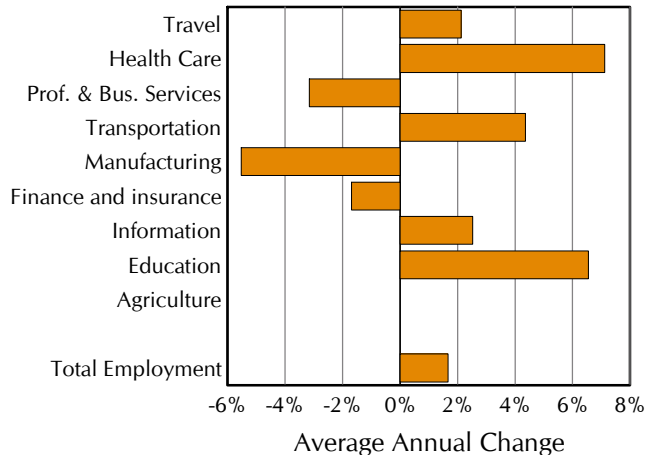
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

El Dorado County Industry Assessment

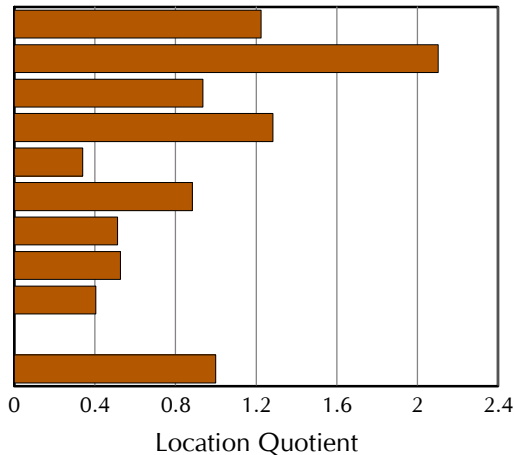
El Dorado County is in the Gold Country and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	9,880	1	10.1%	
Travel	8,990	2	9.2%	
Health Care	7,660	3	7.8%	
Finance and insurance	5,510	4	5.6%	
Manufacturing	2,120	5	2.2%	
Education	1,730	6	1.8%	
Agriculture	1,540	7	1.6%	
Information	1,350	8	1.4%	
Transportation	1,080	9	1.1%	
Sub Total				n.a., about 39,900 employees
Total Employment	97,910		100.0%	

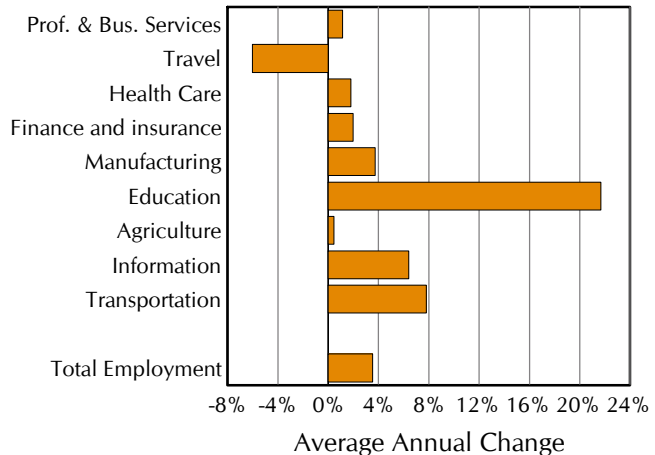
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Fresno County Industry Assessment

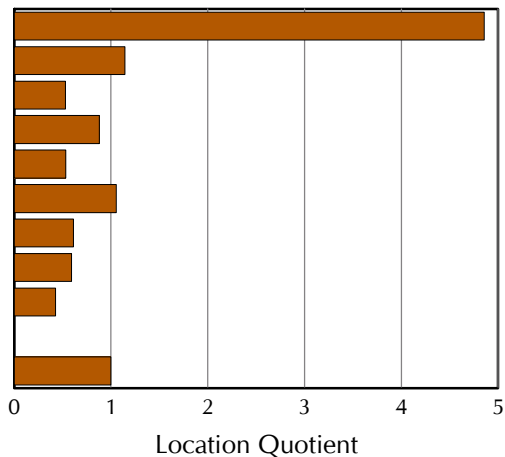
Fresno County is in the Central Valley and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Agriculture	68,220	1	14.9%	
Health Care	43,740	2	9.6%	
Prof. & Bus. Services	19,910	3	4.4%	
Finance and insurance	17,610	4	3.9%	
Manufacturing	15,510	5	3.4%	
Transportation	13,100	6	2.9%	
Travel	12,190	7	2.7%	
Education	5,420	8	1.2%	
Information	5,110	9	1.1%	
Sub Total	200,810		43.9%	
Total Employment	457,160		100.0%	

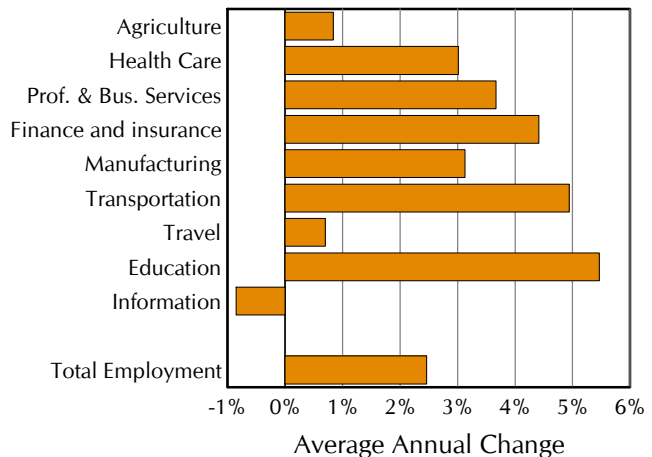
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Glenn County Industry Assessment

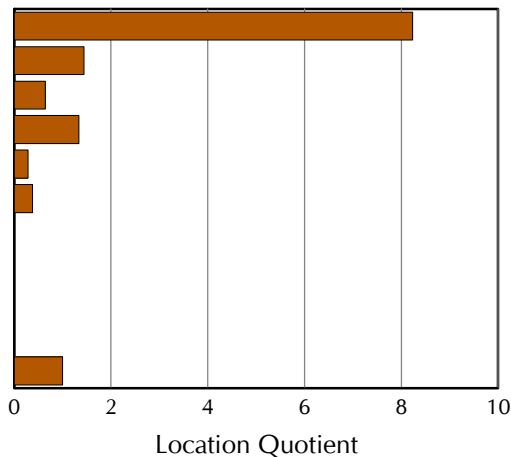
Glenn County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	3,160	1	25.3%	
Travel	790	2	6.3%	
Manufacturing	510	3	4.1%	
Transportation	460	4	3.7%	
Prof. & Bus. Services	300	5	2.4%	
Finance and insurance	210	6	1.7%	
Education				n.a.
Health Care				n.a.
Information				n.a.
Sub Total				n.a., about 6,000 employees
Total Employment	12,500		100.0%	

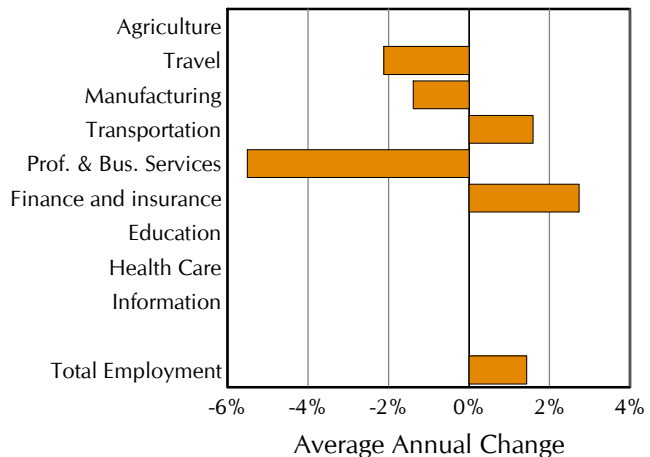
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Humboldt County Industry Assessment

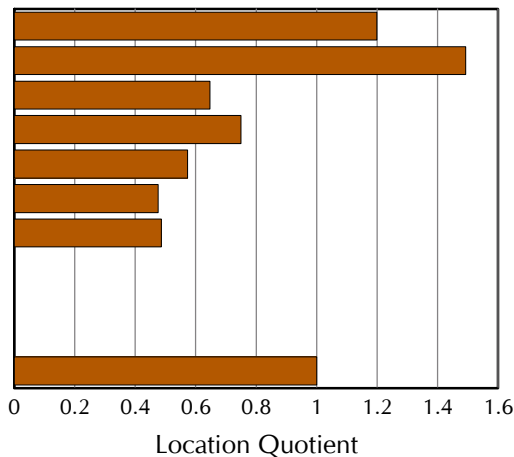
Humboldt County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	7,330	1	10.0%	
Travel	4,770	2	6.5%	
Prof. & Bus. Services	3,900	3	5.3%	
Manufacturing	3,490	4	4.8%	
Finance and insurance	1,840	5	2.5%	
Information	910	6	1.2%	
Education	710	7	1.0%	
Agriculture				n.a., about 5,000 employees
Transportation				n.a., about 1,500 employees
Sub Total				n.a., about 30,000 employees
Total Employment	73,120		100.0%	

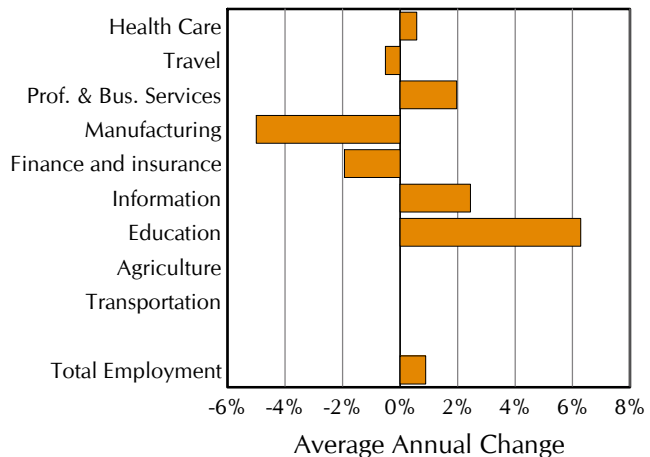
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Imperial County Industry Assessment

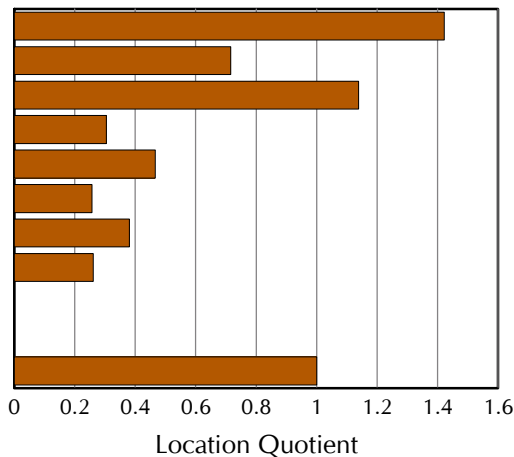
Imperial County is in the The Deserts Region.

Industry	Employment	*Rank	Percent	Notes
Travel	4,360	1	6.2%	
Health Care	4,200	2	6.0%	
Transportation	2,170	3	3.1%	
Prof. & Bus. Services	1,760	4	2.5%	
Finance and insurance	1,430	5	2.0%	
Manufacturing	1,150	6	1.6%	
Education	530	7	0.8%	
Information	480	8	0.7%	
Agriculture				n.a., about 7,000 employees
Sub Total				n.a., about 23,700 employees
Total Employment	70,140		100.0%	

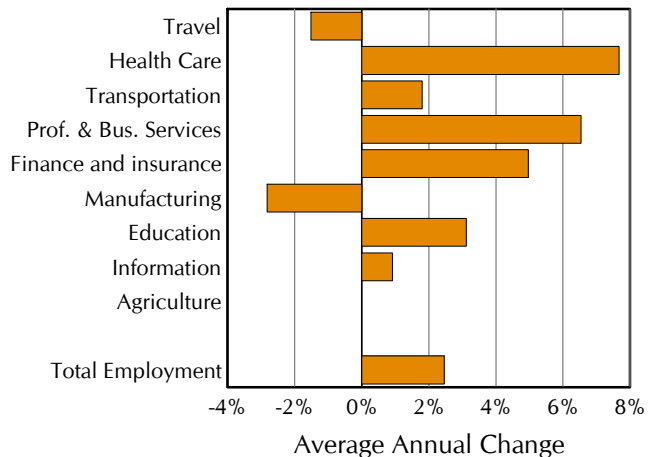
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Inyo County Industry Assessment

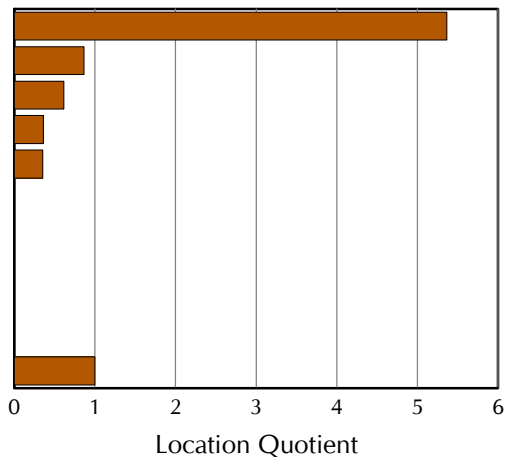
Inyo County is in the High Sierra and The Deserts Regions.

Industry	Employment	*Rank	Percent	Notes
Travel	2,490	1	23.4%	
Information	240	2	2.3%	
Agriculture	200	3	1.9%	
Finance and insurance	170	4	1.6%	
Transportation	100	5	0.9%	
Education				n.a.
Health Care				n.a.
Manufacturing				n.a., about 200 employees
Prof. & Bus. Services				n.a., about 500-900 employees
Sub Total				n.a., about 4,800 employees
Total Employment	10,640		100.0%	

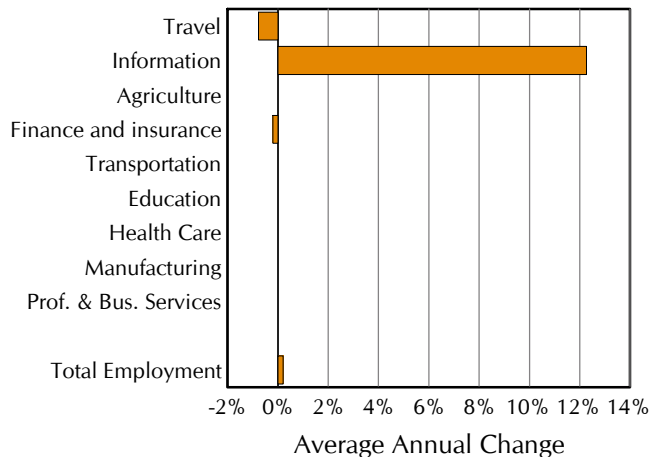
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Kern County Industry Assessment

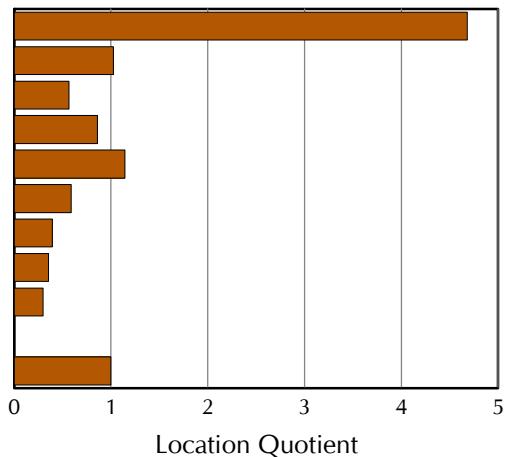
Kern County is in the Central Valley and The Deserts Regions.

Industry	Employment	*Rank	Percent	Notes
Agriculture	52,950	1	14.4%	
Health Care	31,570	2	8.6%	
Prof. & Bus. Services	17,140	3	4.7%	
Travel	13,810	4	3.7%	
Transportation	11,460	5	3.1%	
Finance and insurance	9,490	6	2.6%	
Manufacturing	9,250	7	2.5%	
Information	3,420	8	0.9%	
Education	2,200	9	0.6%	
Sub Total	151,300		41.1%	
Total Employment	368,280		100.0%	

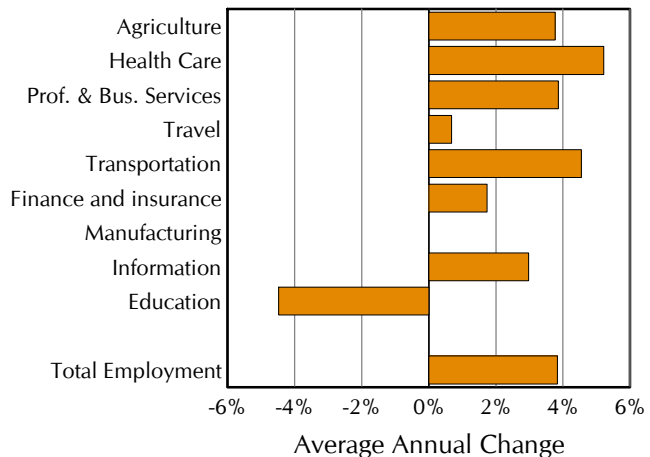
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Kings County Industry Assessment

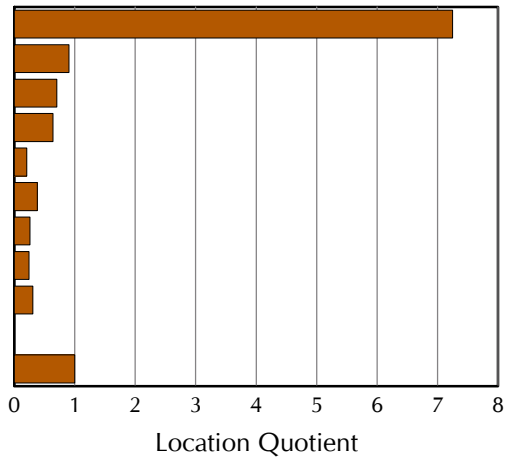
Kings County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	13,920	1	22.3%	
Health Care	4,730	2	7.6%	
Travel	1,930	3	3.1%	
Transportation	1,090	4	1.7%	
Prof. & Bus. Services	1,060	5	1.7%	
Finance and insurance	1,050	6	1.7%	
Manufacturing	1,040	7	1.7%	
Information	400	8	0.6%	
Education	390	9	0.6%	
Sub Total	25,620		41.0%	
Total Employment	62,550		100.0%	

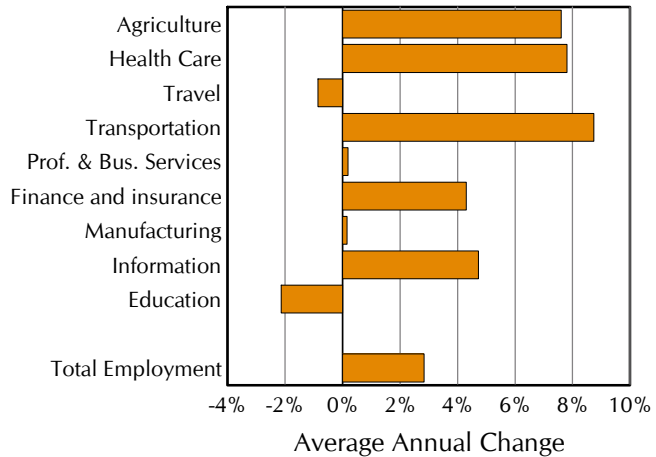
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Lake County Industry Assessment

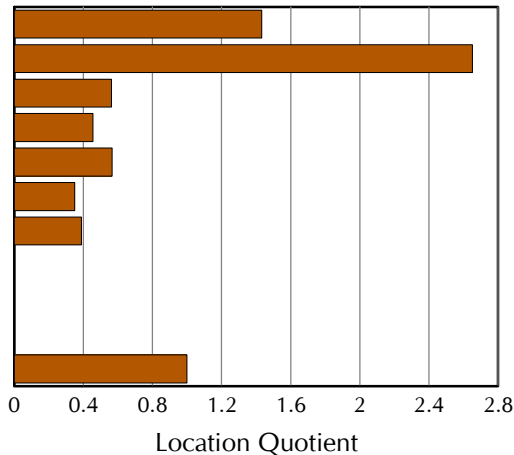
Lake County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	2,920	1	12.0%	
Travel	2,820	2	11.6%	
Prof. & Bus. Services	1,130	3	4.6%	
Finance and insurance	490	4	2.0%	
Transportation	380	5	1.6%	
Information	220	6	0.9%	
Education	190	7	0.8%	
Agriculture				n.a., about 2,000-2,500 employees
Manufacturing				n.a., about 150-200 employees
Sub Total				n.a., about 11,000 employees
Total Employment	24,340		100.0%	

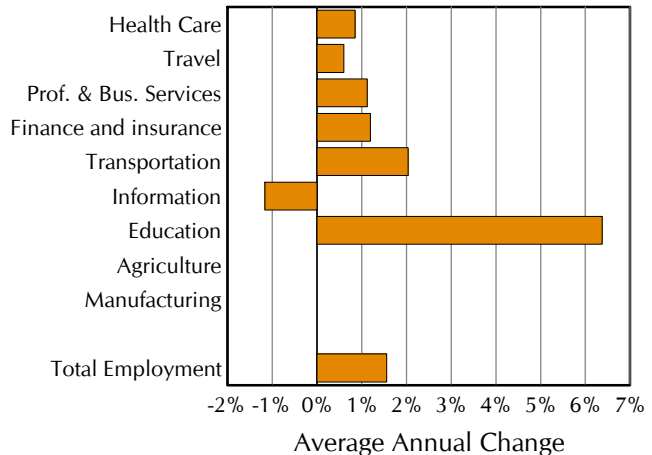
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Lassen County Industry Assessment

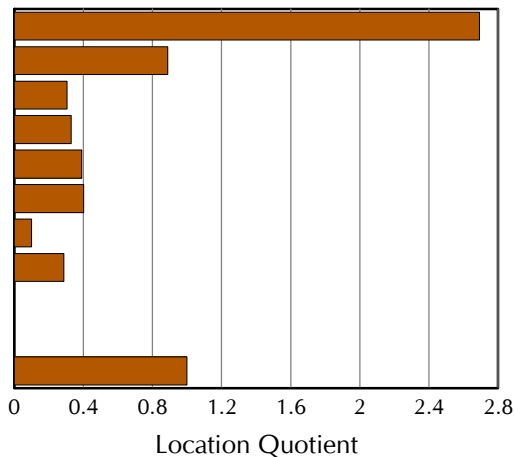
Lassen County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Travel	1,720	1	11.8%	
Health Care	1,080	2	7.4%	
Prof. & Bus. Services	370	3	2.5%	
Finance and insurance	210	4	1.4%	
Transportation	160	5	1.1%	
Information	150	6	1.0%	
Manufacturing	90	7	0.6%	
Education	80	8	0.5%	
Agriculture				n.a., about 1,000 employees
Sub Total				n.a., about 5,100 employees
Total Employment	14,620		100.0%	

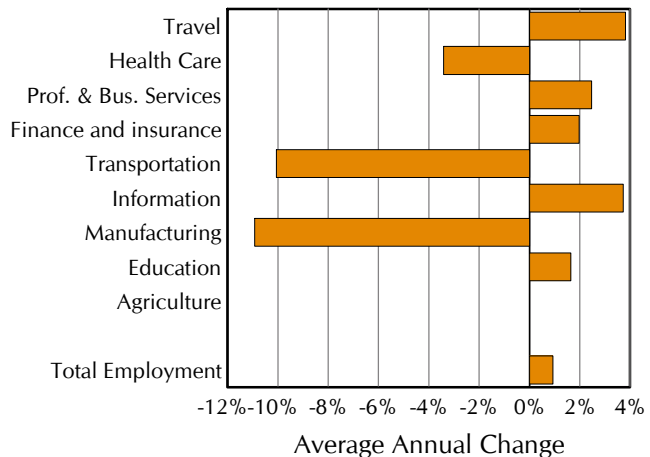
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

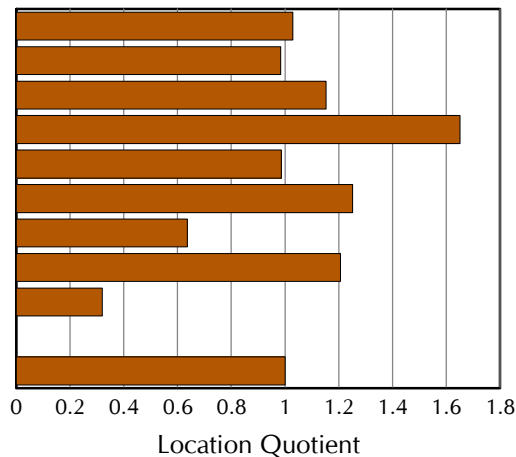
Los Angeles County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Health Care	502,650	1	8.6%	
Prof. & Bus. Services	473,340	2	8.1%	
Manufacturing	428,950	3	7.3%	
Information	253,120	4	4.3%	
Finance and insurance	252,990	5	4.3%	
Transportation	198,930	6	3.4%	
Travel	162,570	7	2.8%	
Education	141,080	8	2.4%	
Agriculture	57,450	9	1.0%	
Sub Total	2,471,060		42.3%	
Total Employment	5,846,140		100.0%	

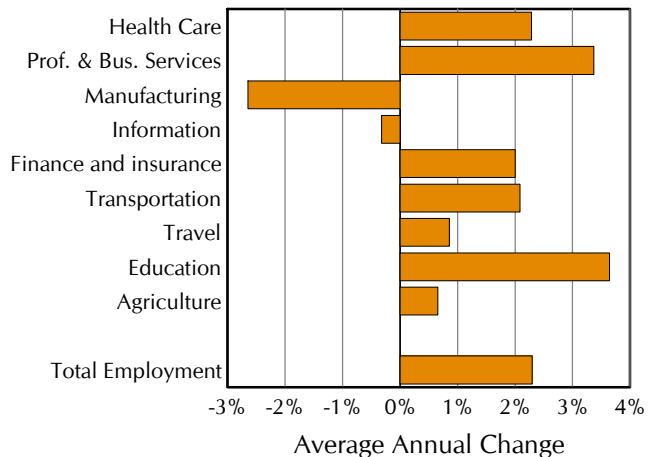
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Madera County Industry Assessment

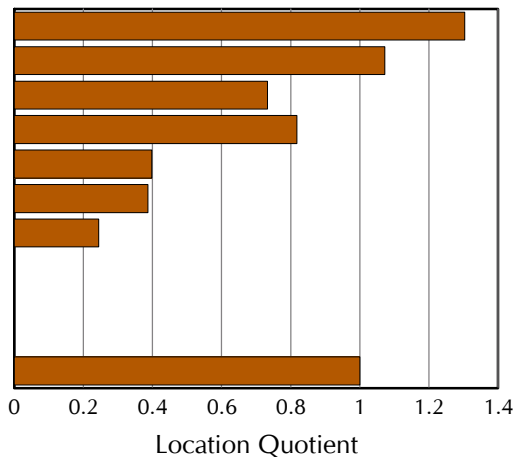
Madera County is in the Central Valley, Gold Country and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	6,700	1	10.9%	
Travel	2,880	2	4.7%	
Manufacturing	2,870	3	4.7%	
Transportation	1,370	4	2.2%	
Finance and insurance	1,070	5	1.7%	
Information	620	6	1.0%	
Education	300	7	0.5%	
Agriculture				n.a., about 8,000 employees
Prof. & Bus. Services				n.a., about 500-1,000 employees
Sub Total				n.a., about 24,700 employees
Total Employment	61,450		100.0%	

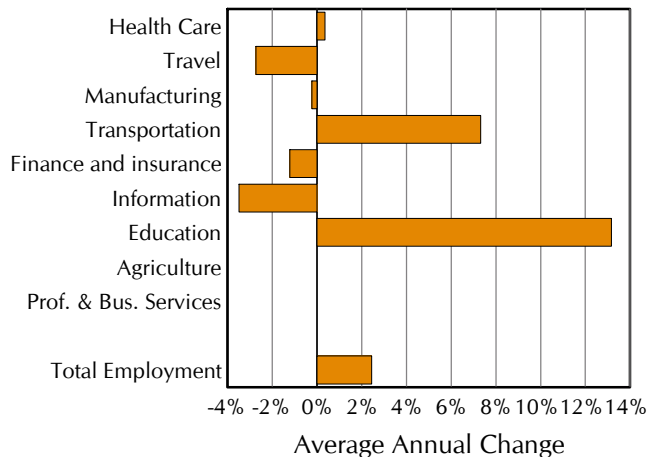
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Marin County Industry Assessment

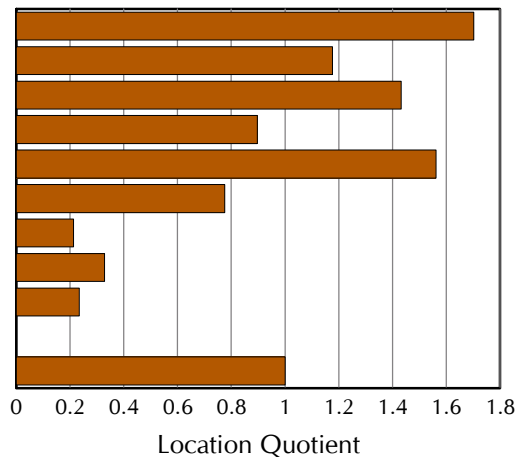
Marin County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	25,940	1	14.0%	
Health Care	18,200	2	9.8%	
Finance and insurance	11,630	3	6.3%	
Travel	7,250	4	3.9%	
Education	5,780	5	3.1%	
Information	3,760	6	2.0%	
Manufacturing	2,510	7	1.4%	
Transportation	1,660	8	0.9%	
Agriculture	1,340	9	0.7%	
Sub Total	78,070		42.2%	
Total Employment	185,100		100.0%	

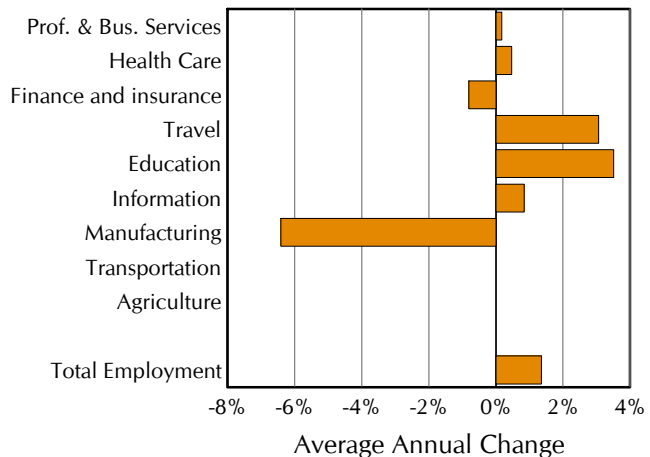
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Mariposa County Industry Assessment

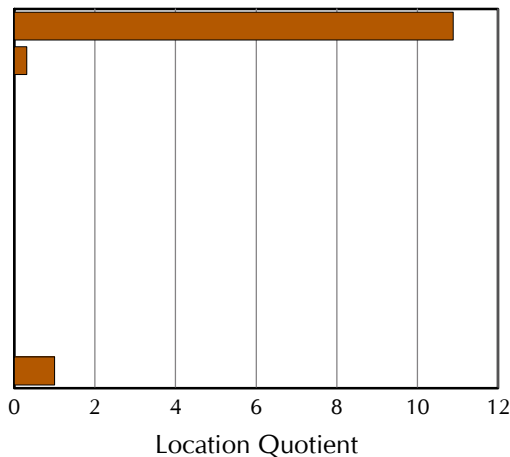
Mariposa County is in the Gold Country Region and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Travel	4,160	1	47.6%	
Information	70	2	0.8%	
Agriculture				n.a.
Education				n.a.
Finance and insurance				n.a.
Health Care				n.a.
Manufacturing				n.a.
Prof. & Bus. Services				n.a.
Transportation				n.a.
Sub Total				n.a., about 6,500 employees
Total Employment	8,740		100.0%	

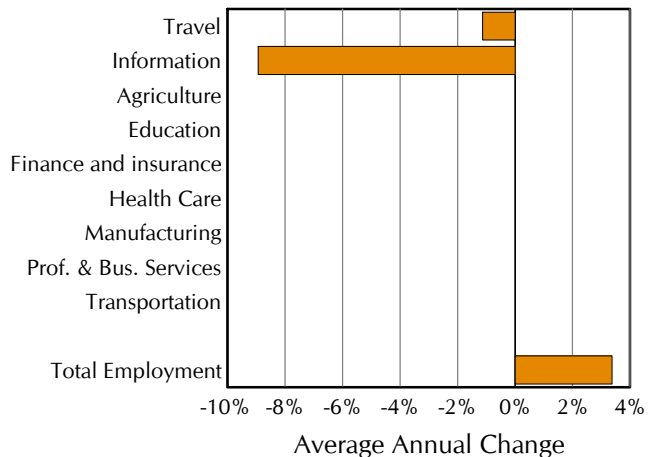
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Mendocino County Industry Assessment

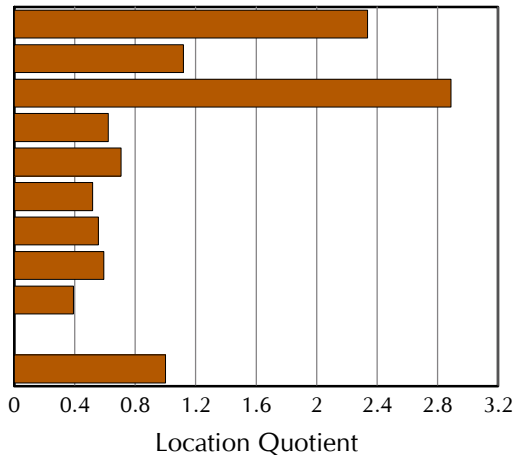
Mendocino County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Travel	5,290	1	10.2%	
Health Care	4,850	2	9.4%	
Agriculture	4,600	3	8.9%	
Prof. & Bus. Services	2,650	4	5.1%	
Manufacturing	2,340	5	4.5%	
Finance and insurance	1,180	6	2.3%	
Transportation	780	7	1.5%	
Education	620	8	1.2%	
Information	530	9	1.0%	
Sub Total	22,850		44.1%	
Total Employment	51,870		100.0%	

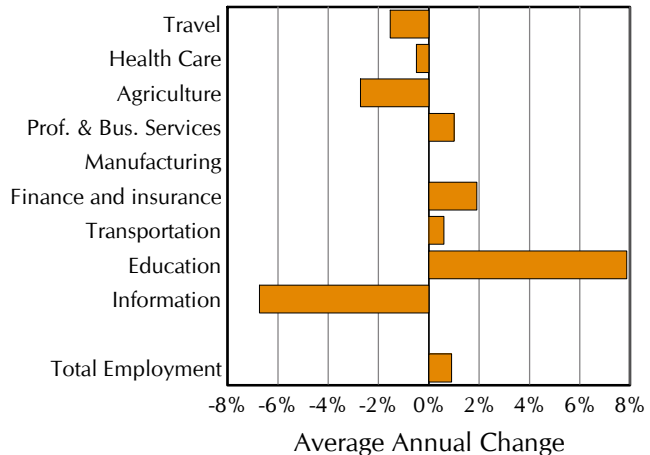
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Merced County Industry Assessment

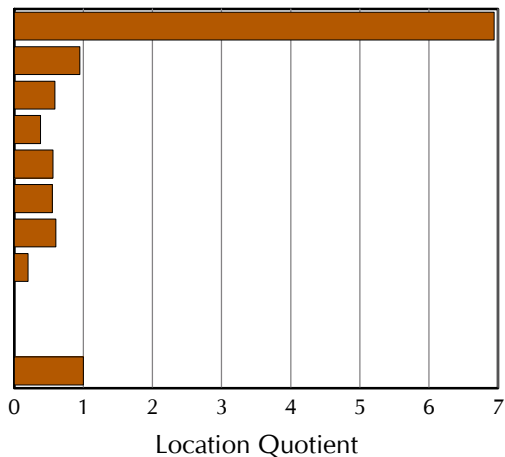
Merced County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	20,190	1	21.3%	
Health Care	7,530	2	8.0%	
Manufacturing	3,560	3	3.8%	Estimate
Prof. & Bus. Services	2,970	4	3.1%	
Travel	2,330	5	2.5%	
Finance and insurance	2,290	6	2.4%	
Information	1,500	7	1.6%	
Education	380	8	0.4%	
Transportation				n.a., about 2,500 to 3,000 employees
Sub Total				n.a., about 43,700 employees
Total Employment	94,690		100.0%	

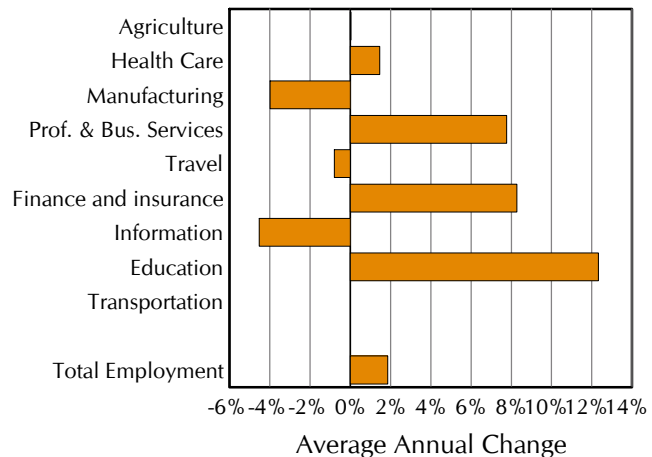
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Modoc County Industry Assessment

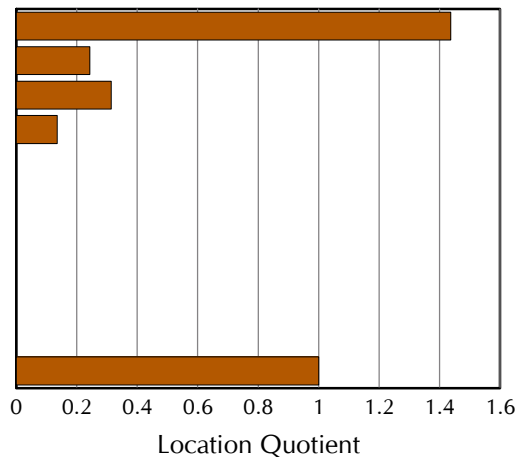
Modoc County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Travel	290	1	6.2%	
Prof. & Bus. Services	90	2	1.9%	
Finance and insurance	60	3	1.3%	
Manufacturing	40	4	0.9%	
Agriculture				n.a., about 1,500 employees
Education				n.a.
Health Care				n.a.
Information				n.a.
Transportation				n.a.
Sub Total				n.a., about 2,800 employees
Total Employment	4,650		100.0%	

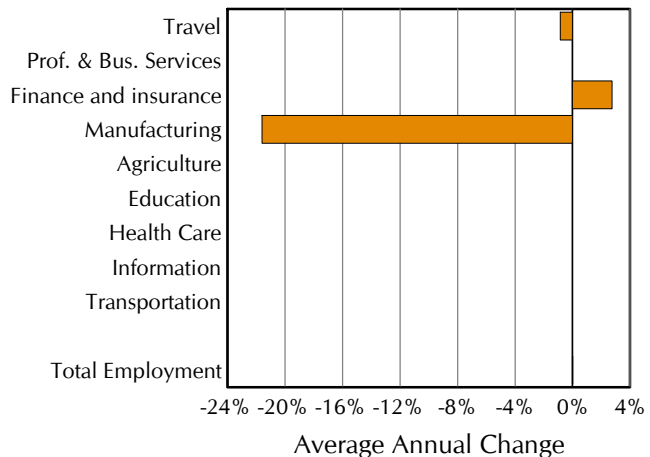
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Mono County Industry Assessment

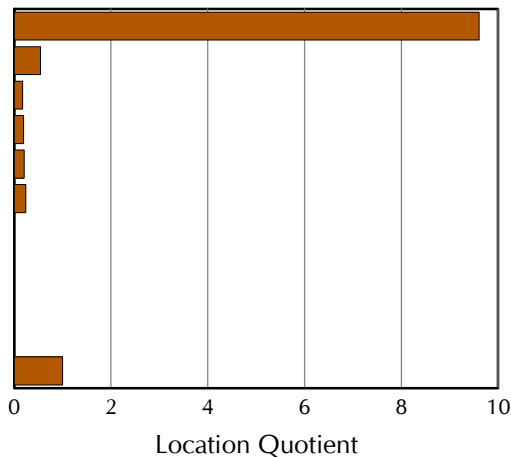
Mono County is in the High Sierra Region.

Industry	Employment	*Rank	Percent	Notes
Travel	4,410	1	41.9%	
Prof. & Bus. Services	470	2	4.5%	
Health Care	150	3	1.4%	
Finance and insurance	90	4	0.9%	
Information	60	5	0.6%	
Education	50	6	0.5%	
Agriculture				n.a., about 250 employees
Manufacturing				n.a., less than 100 employees
Transportation				n.a.
Sub Total				n.a., about 5,700 employees
Total Employment	10,520		100.0%	

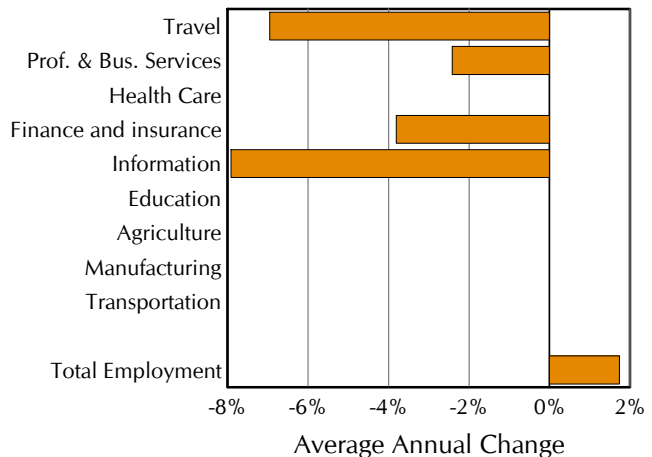
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Monterey County Industry Assessment

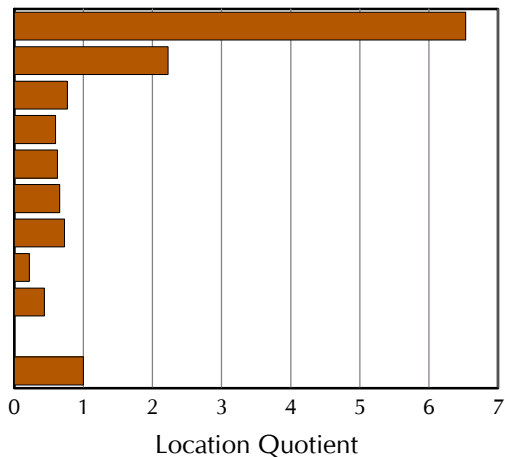
Monterey County is in the Central Coast Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	46,910	1	20.1%	
Travel	22,740	2	9.7%	
Health Care	15,040	3	6.4%	
Prof. & Bus. Services	11,530	4	4.9%	
Finance and insurance	6,430	5	2.7%	
Transportation	4,180	6	1.8%	
Education	3,400	7	1.5%	
Manufacturing	3,260	8	1.4%	
Information	2,680	9	1.1%	
Sub Total	116,170		49.7%	
Total Employment	233,850		100.0%	

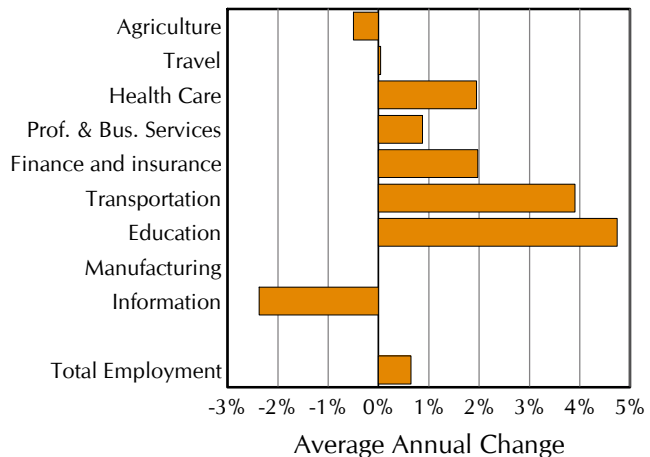
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Napa County Industry Assessment

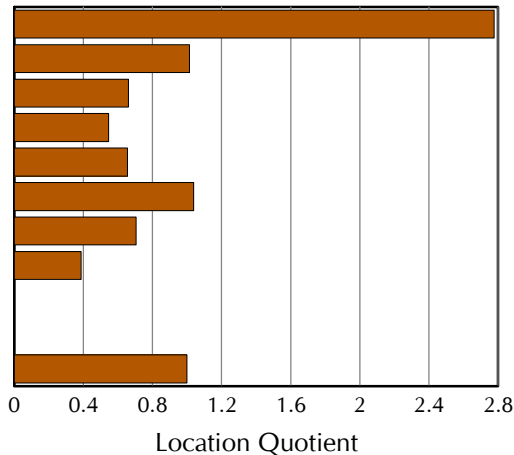
Napa County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Travel	11,250	1	12.1%	
Health Care	7,860	2	8.5%	
Prof. & Bus. Services	5,040	3	5.4%	
Manufacturing	3,230	4	3.5%	
Finance and insurance	2,660	5	2.9%	
Education	1,920	6	2.1%	
Transportation	1,780	7	1.9%	
Information	940	8	1.0%	
Agriculture				n.a., about 14,000 to 15,000 employees
Sub Total				n.a., about 49,500 employees
Total Employment	92,730		100.0%	

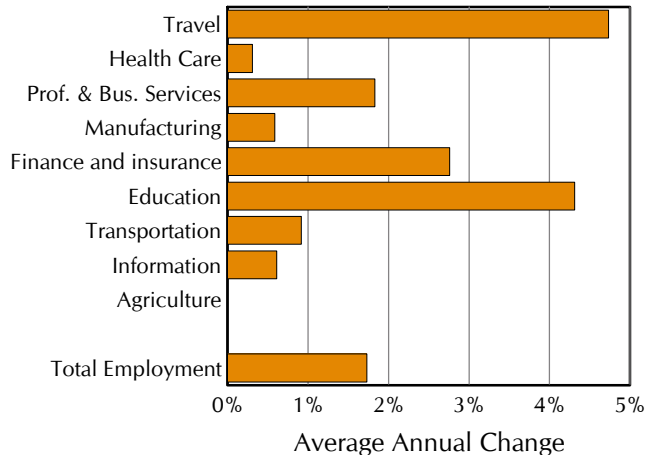
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Nevada County Industry Assessment

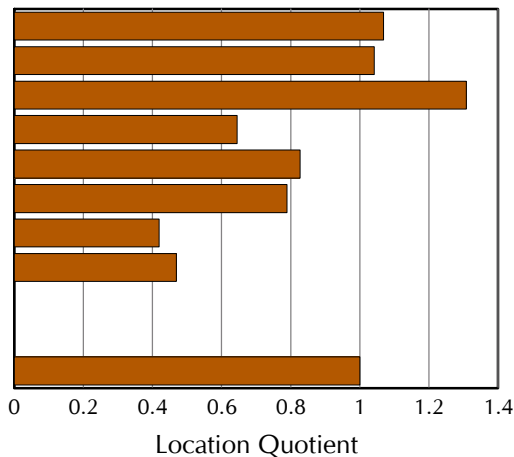
Nevada County is in the Gold Country Region and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	5,280	1	8.9%	
Prof. & Bus. Services	5,070	2	8.6%	
Travel	3,380	3	5.7%	
Manufacturing	2,430	4	4.1%	
Finance and insurance	2,140	5	3.6%	
Education	930	6	1.6%	
Agriculture	760	7	1.3%	
Information	730	8	1.2%	
Transportation				n.a., about 700 employees
Sub Total				n.a., about 21,500 employees
Total Employment	59,090		100.0%	

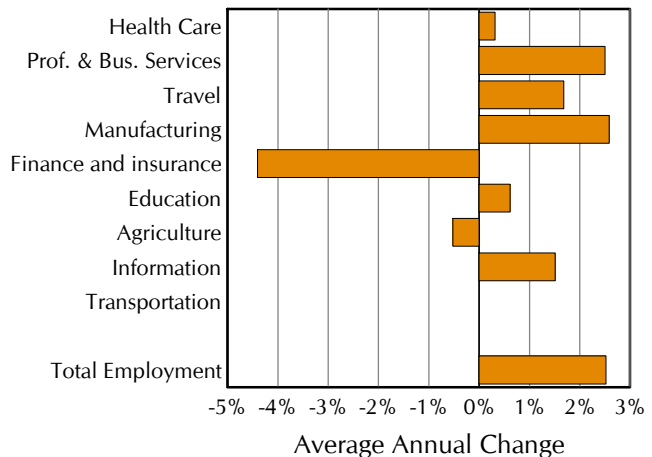
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

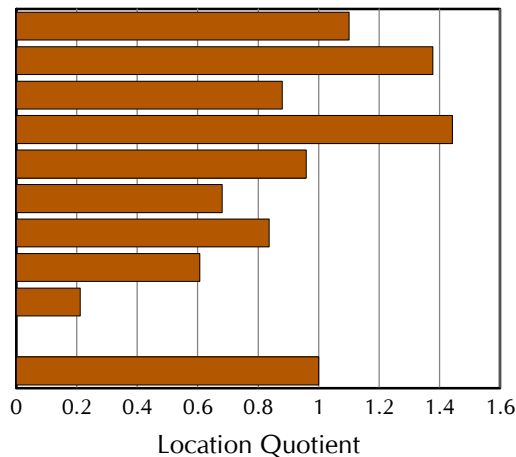
Orange County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	185,690	1	9.1%	
Manufacturing	179,750	2	8.8%	
Health Care	150,680	3	7.4%	
Finance and insurance	129,640	4	6.3%	
Travel	85,840	5	4.2%	
Information	36,620	6	1.8%	
Education	34,280	7	1.7%	
Transportation	33,810	8	1.6%	
Agriculture	13,320	9	0.6%	
Sub Total	849,640		41.5%	
Total Employment	2,049,270		100.0%	

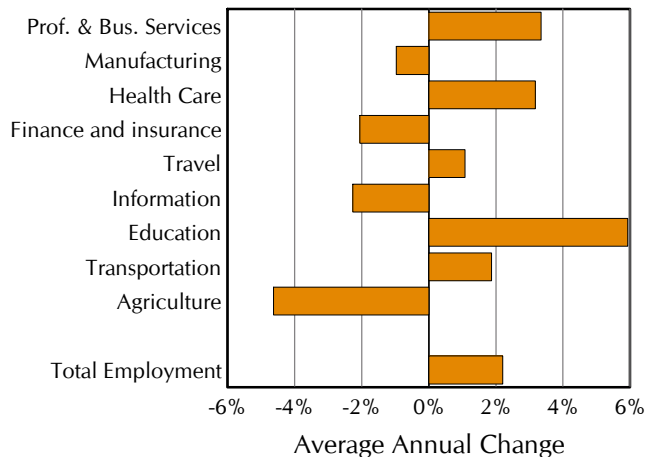
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Placer County Industry Assessment

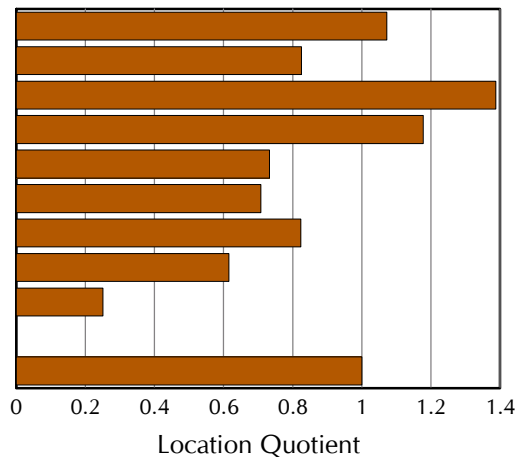
Placer County is in the Central Valley, Gold Country and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	17,700	1	9.0%	
Prof. & Bus. Services	13,420	2	6.8%	
Finance and insurance	12,010	3	6.1%	
Travel	10,160	4	5.1%	
Manufacturing	9,210	5	4.7%	
Transportation	3,800	6	1.9%	
Education	3,250	7	1.6%	
Information	3,190	8	1.6%	
Agriculture	1,520	9	0.8%	
Sub Total	74,260		37.6%	
Total Employment	197,430		100.0%	

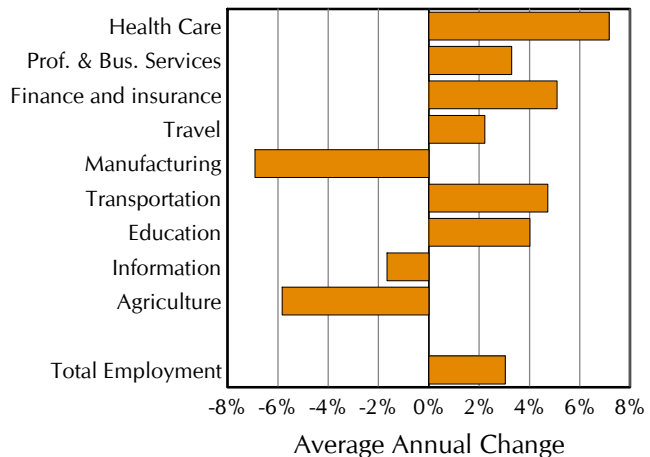
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Plumas County Industry Assessment

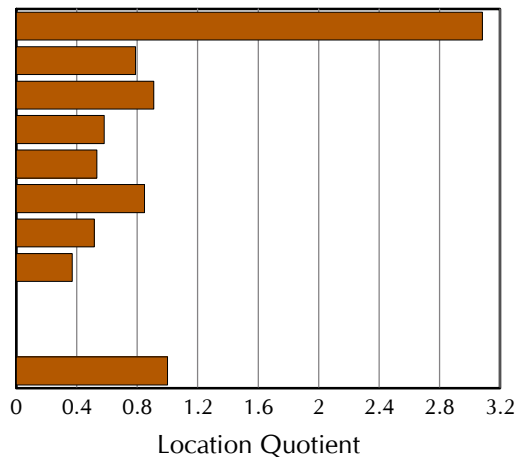
Plumas County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Travel	1,510	1	13.5%	
Health Care	740	2	6.6%	
Manufacturing	650	3	5.8%	Estimate
Prof. & Bus. Services	540	4	4.8%	
Finance and insurance	260	5	2.3%	
Transportation	260	6	2.3%	
Education	120	7	1.1%	
Information	110	8	1.0%	
Agriculture				n.a., about 200-300 employees
Sub Total				n.a., about 4,500 employees
Total Employment	11,220		100.0%	

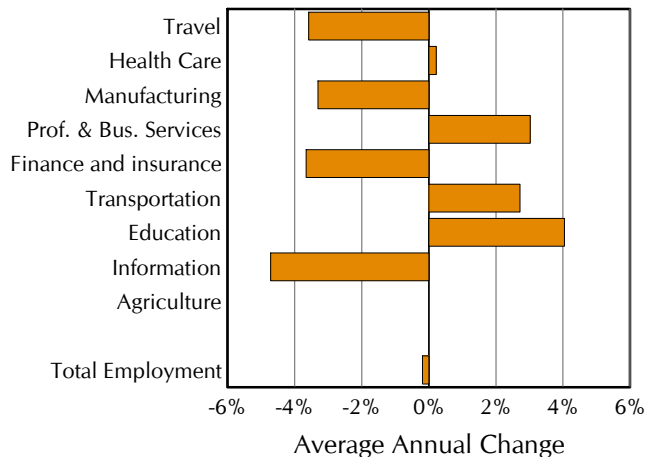
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Riverside County Industry Assessment

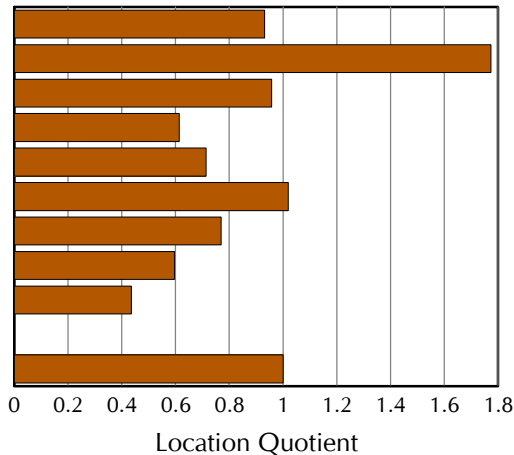
Riverside County is in the Inland Empire and The Deserts Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	69,300	1	7.8%	
Travel	68,990	2	7.7%	
Manufacturing	54,330	3	6.1%	
Prof. & Bus. Services	45,020	4	5.1%	
Finance and insurance	27,860	5	3.1%	
Transportation	24,700	6	2.8%	
Agriculture	21,060	7	2.4%	
Education	10,620	8	1.2%	
Information	10,180	9	1.1%	
Sub Total				
Total Employment	890,590		100.0%	

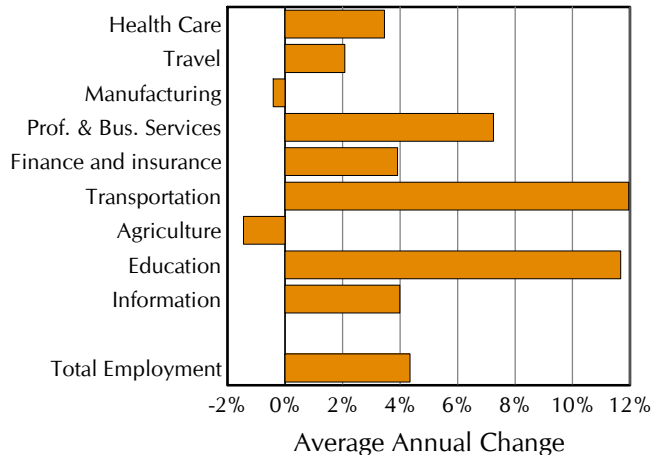
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Sacramento County Industry Assessment

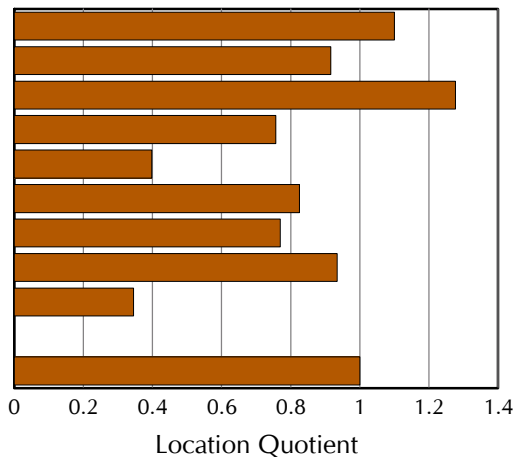
Sacramento County is in the Gold Country Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	75,860	1	9.2%	
Prof. & Bus. Services	62,240	2	7.5%	
Finance and insurance	46,220	3	5.6%	
Travel	27,280	4	3.3%	
Manufacturing	20,900	5	2.5%	
Information	17,860	6	2.2%	
Transportation	17,260	7	2.1%	
Education	15,430	8	1.9%	
Agriculture	8,740	9	1.1%	
Sub Total	291,800		35.4%	
Total Employment	825,160		100.0%	

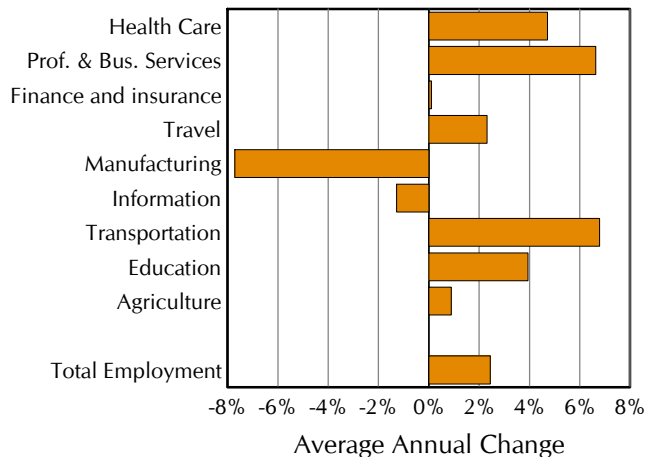
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Benito County Industry Assessment

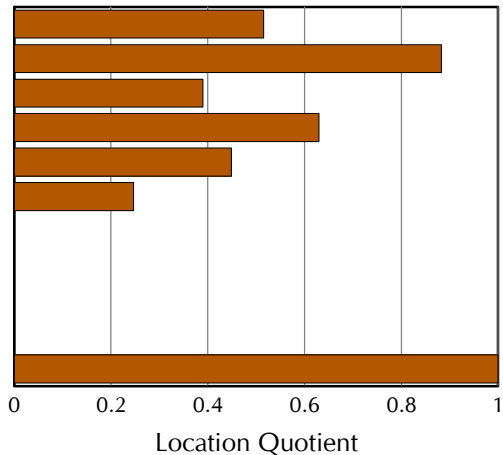
San Benito County is in the Central Coast Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	1,050	1	4.3%	
Travel	940	2	3.9%	
Prof. & Bus. Services	780	3	3.2%	
Finance and insurance	670	4	2.7%	
Education	220	5	0.9%	
Information	160	6	0.7%	
Agriculture				n.a., about 2,000-4,000 employees
Manufacturing				n.a., about 2,000 employees
Transportation				n.a.
Sub Total				n.a., about 9,750 employees
Total Employment	24,410		100.0%	

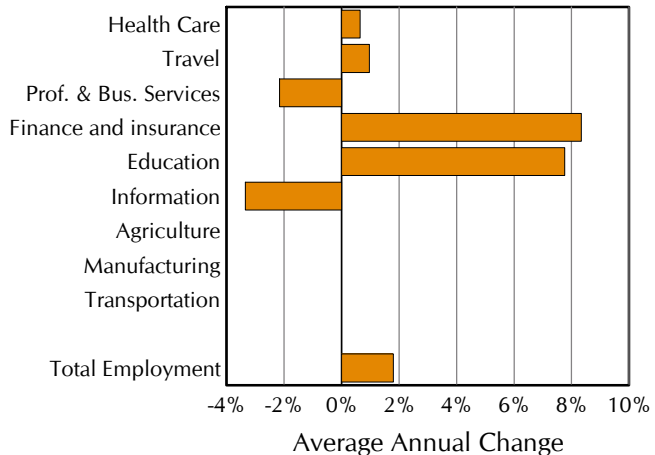
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Bernardino County Industry Assessment

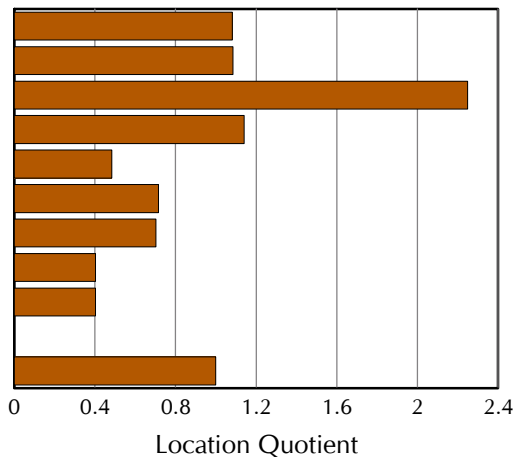
San Bernardino County is in the Inland Empire and The Deserts Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	80,700	1	9.0%	
Manufacturing	61,690	2	6.9%	
Transportation	54,580	3	6.1%	
Travel	44,420	4	5.0%	
Prof. & Bus. Services	35,590	5	4.0%	
Finance and insurance	28,000	6	3.1%	
Education	12,560	7	1.4%	
Agriculture	11,060	8	1.2%	
Information	9,440	9	1.1%	
Sub Total	338,050		37.9%	
Total Employment	892,440		100.0%	

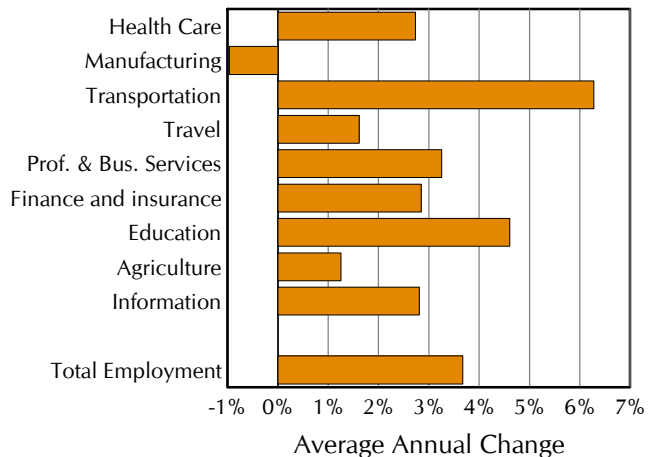
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

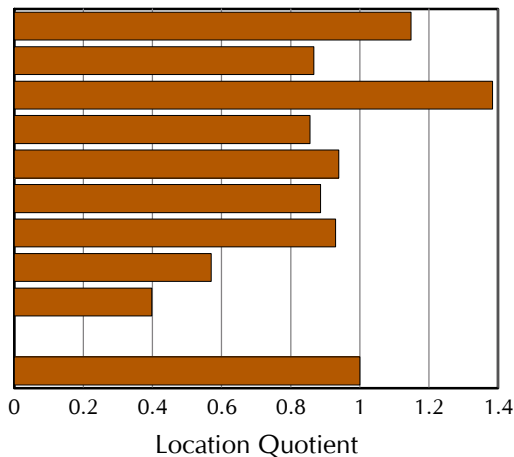
San Diego County Industry Assessment

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	181,910	1	9.5%	
Health Care	139,440	2	7.2%	
Travel	116,340	3	6.0%	
Manufacturing	104,840	4	5.4%	
Finance and insurance	79,310	5	4.1%	
Information	44,730	6	2.3%	
Education	35,800	7	1.9%	
Transportation	29,860	8	1.6%	
Agriculture	23,540	9	1.2%	
Sub Total	755,770		39.3%	
Total Employment	1,924,830		100.0%	

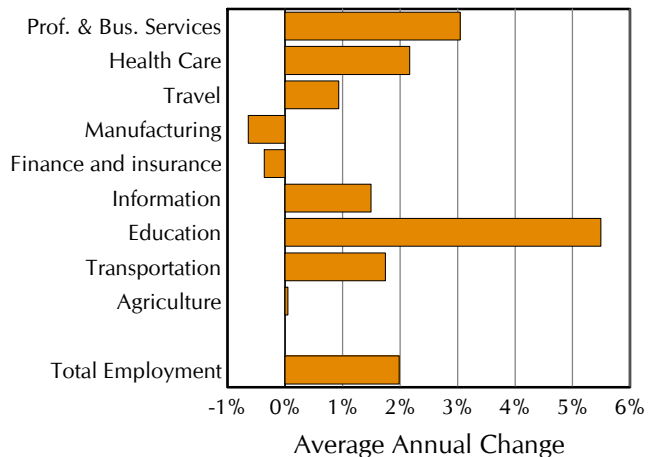
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Francisco County Industry Assessment

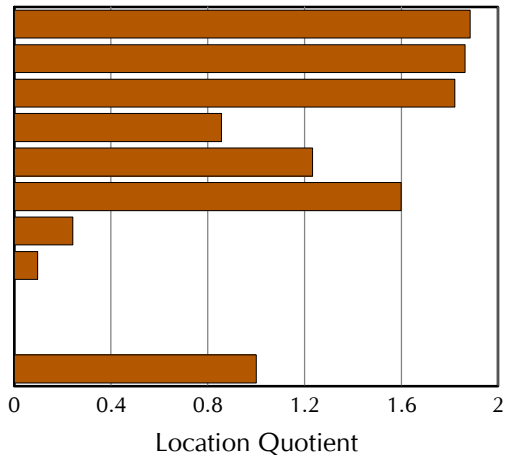
San Francisco County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	114,270	1	15.5%	
Finance and insurance	60,200	2	8.2%	
Travel	58,560	3	8.0%	
Health Care	52,750	4	7.2%	
Information	23,800	5	3.2%	
Education	23,560	6	3.2%	
Manufacturing	11,340	7	1.5%	
Agriculture	2,190	8	0.3%	
Transportation				n.a.
Sub Total				n.a., about 354,000 employees
Total Employment	736,420		100.0%	

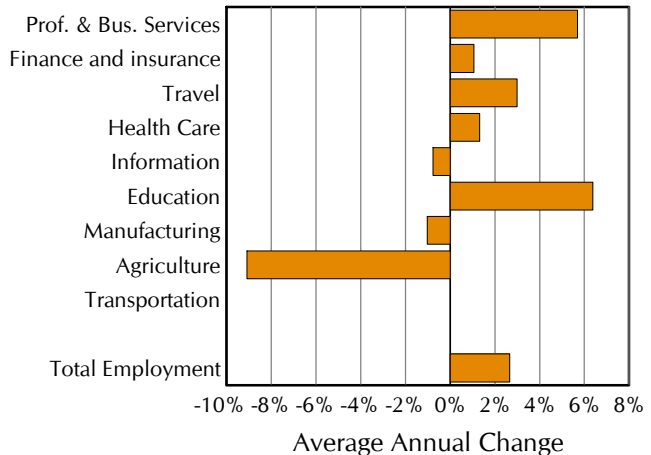
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Joaquin County Industry Assessment

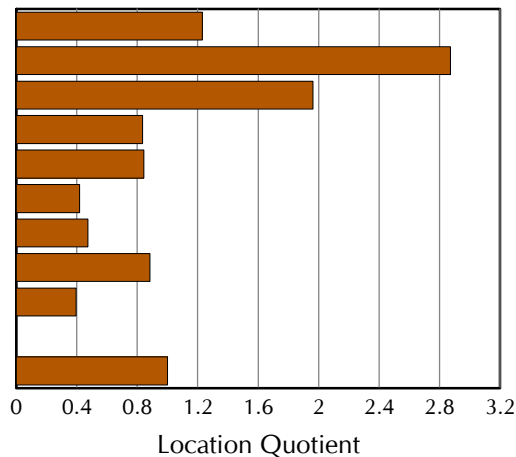
San Joaquin County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	30,450	1	10.3%	
Agriculture	26,100	2	8.8%	
Transportation	15,780	3	5.3%	
Manufacturing	15,730	4	5.3%	
Finance and insurance	10,940	5	3.7%	
Prof. & Bus. Services	10,190	6	3.4%	
Travel	6,110	7	2.1%	
Education	5,230	8	1.8%	
Information	3,070	9	1.0%	
Sub Total	123,610		41.8%	
Total Employment	295,760		100.0%	

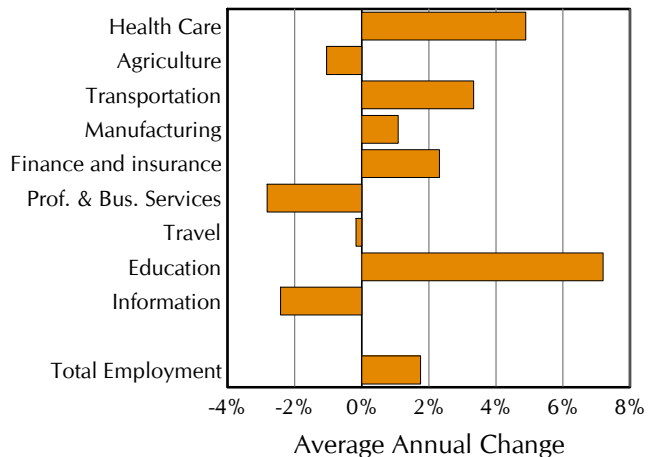
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Luis Obispo County Industry Assessment

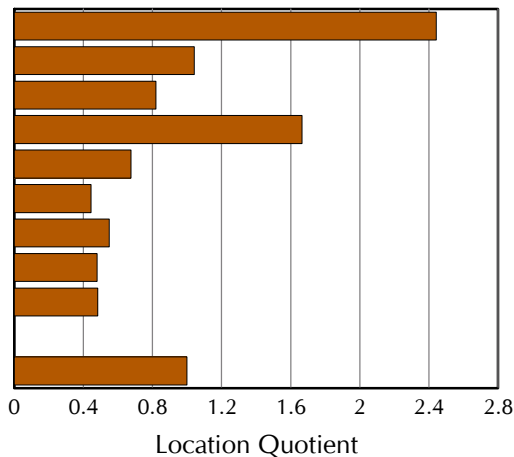
San Luis Obispo County is in the Central Coast Region.

Industry	Employment	*Rank	Percent	Notes
Travel	16,890	1	10.7%	
Health Care	13,780	2	8.7%	
Prof. & Bus. Services	10,700	3	6.8%	
Agriculture	8,100	4	5.1%	
Finance and insurance	4,690	5	3.0%	
Manufacturing	4,480	6	2.8%	
Transportation	2,370	7	1.5%	
Information	1,990	8	1.3%	
Education	1,530	9	1.0%	
Sub Total	64,530		40.8%	
Total Employment	158,310		100.0%	

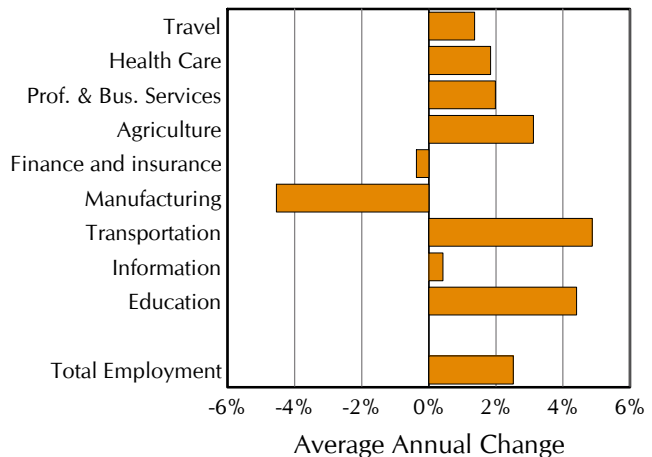
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

San Mateo County Industry Assessment

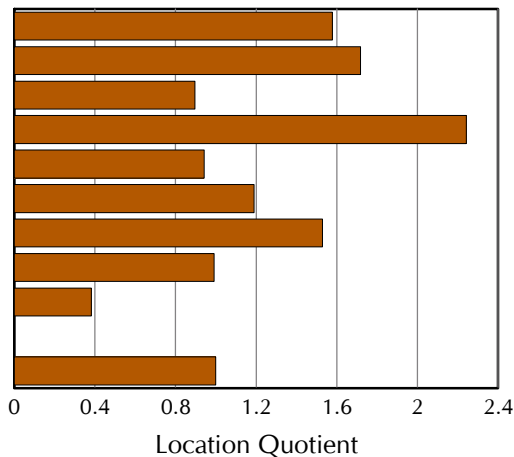
San Mateo County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Prof. & Bus. Services	63,430	1	13.0%	
Travel	36,640	2	7.5%	
Health Care	36,570	3	7.5%	
Transportation	29,760	4	6.1%	
Manufacturing	29,310	5	6.0%	
Finance and insurance	25,480	6	5.2%	
Information	19,580	7	4.0%	
Education	9,690	8	2.0%	
Agriculture	5,740	9	1.2%	
Sub Total	256,190		52.5%	
Total Employment	488,240		100.0%	

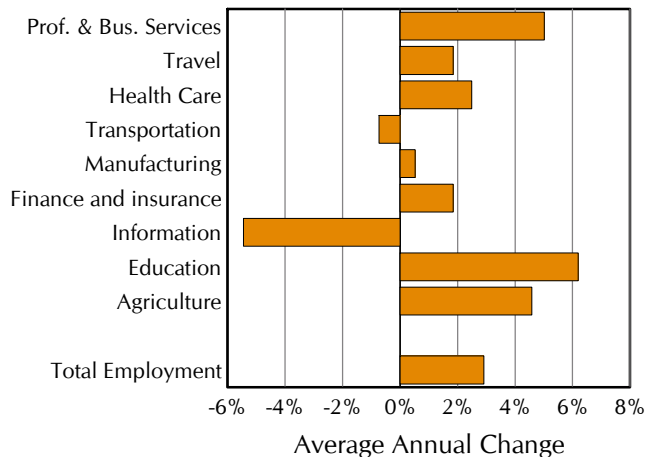
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Santa Barbara County Industry Assessment

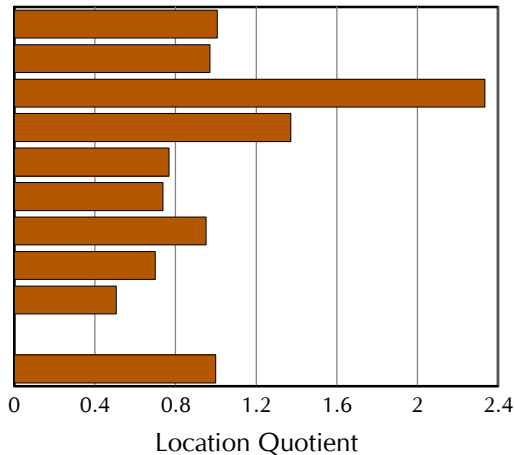
Santa Barbara County is in the Central Coast Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	22,420	1	8.4%	
Prof. & Bus. Services	21,270	2	8.0%	
Agriculture	19,100	3	7.2%	
Travel	15,960	4	6.0%	
Manufacturing	13,020	5	4.9%	
Finance and insurance	8,620	6	3.2%	
Education	5,070	7	1.9%	
Information	4,880	8	1.8%	
Transportation	3,670	9	1.4%	
Sub Total	113,990		42.8%	
Total Employment	266,250		100.0%	

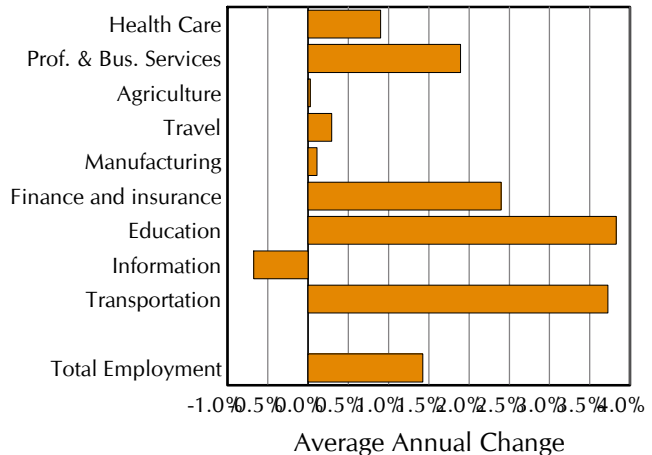
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Santa Clara County Industry Assessment

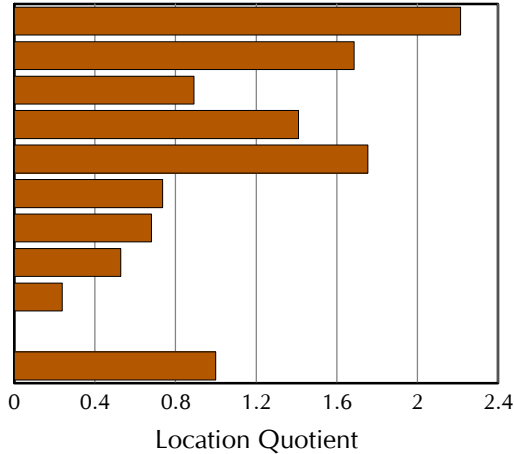
Santa Clara County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Manufacturing	166,280	1	14.1%	
Prof. & Bus. Services	163,800	2	13.9%	
Health Care	87,960	3	7.5%	
Information	43,590	4	3.7%	
Education	41,400	5	3.5%	
Finance and insurance	38,060	6	3.2%	
Travel	35,080	7	3.0%	
Transportation	16,930	8	1.4%	
Agriculture	8,610	9	0.7%	
Sub Total	601,710		51.0%	
Total Employment	1,179,510		100.0%	

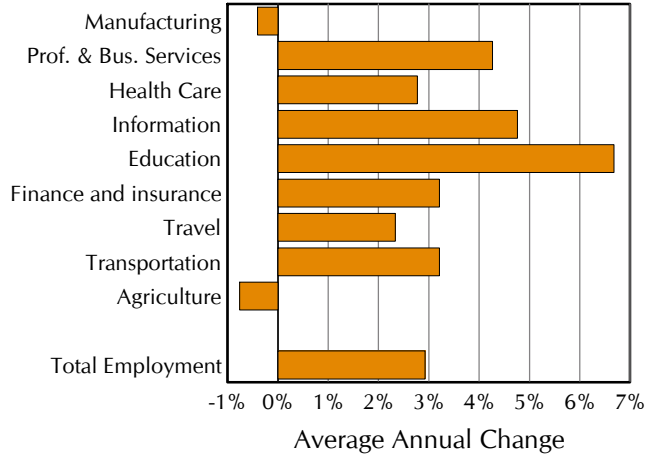
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Santa Cruz County Industry Assessment

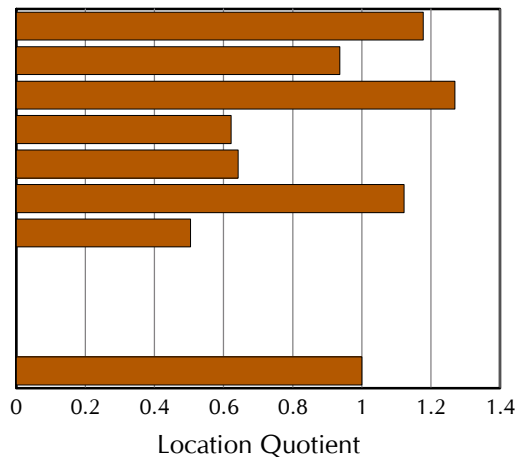
Santa Cruz County is in the San Francisco Bay Area Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	14,560	1	9.8%	
Prof. & Bus. Services	11,400	2	7.7%	
Travel	8,200	3	5.5%	
Manufacturing	5,860	4	4.0%	
Finance and insurance	4,170	5	2.8%	
Education	3,320	6	2.2%	
Information	1,960	7	1.3%	
Agriculture				n.a., about 8,000-10,000 employees
Transportation				n.a.
Sub Total				n.a., about 60,000 employees
Total Employment	147,900		100.0%	

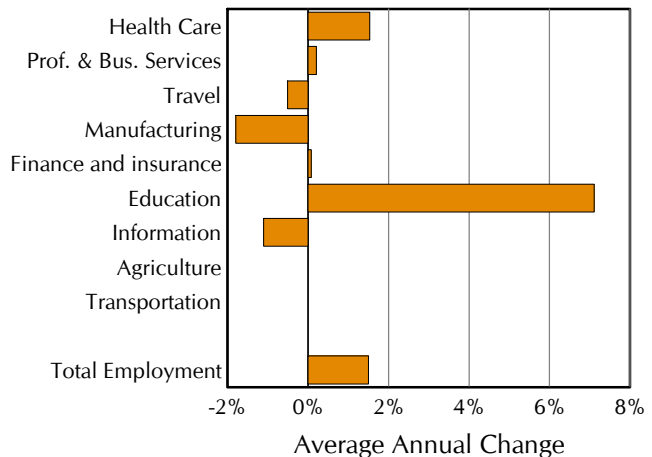
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Shasta County Industry Assessment

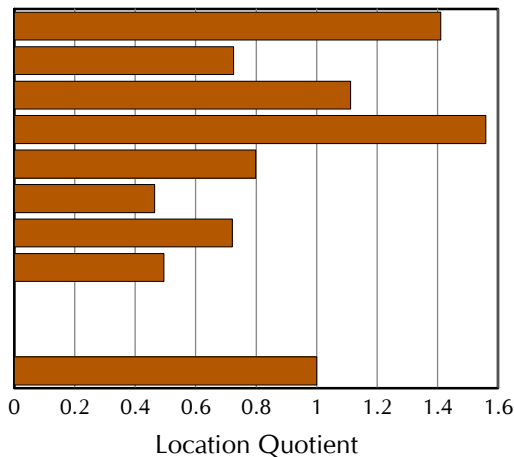
Shasta County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	11,360	1	11.8%	
Prof. & Bus. Services	5,760	2	6.0%	
Travel	4,680	3	4.9%	
Transportation	4,090	4	4.2%	
Finance and insurance	3,380	5	3.5%	
Manufacturing	2,850	6	3.0%	Estimate
Education	1,390	7	1.4%	
Information	1,250	8	1.3%	
Agriculture				n.a., about 2,500 to 3,000 employees
Sub Total				n.a., about 37,800 employees
Total Employment	96,430		100.0%	

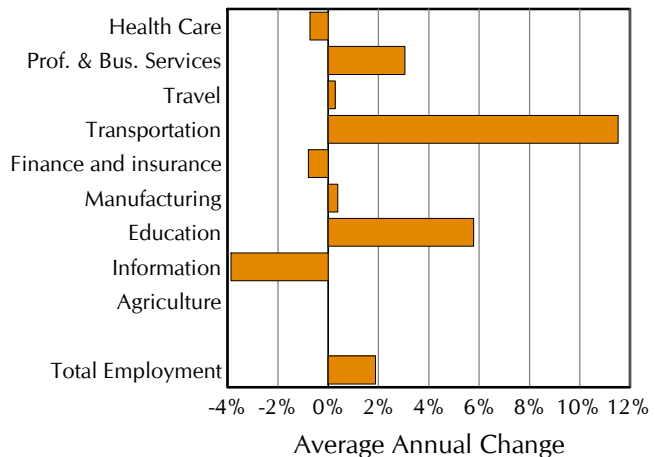
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Sierra County Industry Assessment

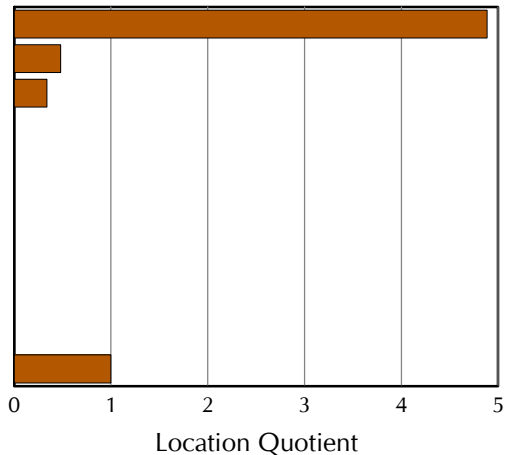
Sierra County is in the High Sierra Region.

Industry	Employment	*Rank	Percent	Notes
Travel	280	1	21.5%	
Health Care	50	2	3.8%	
Prof. & Bus. Services	40	3	3.1%	
Agriculture				n.a.
Education				n.a.
Finance and insurance				n.a.
Information				n.a.
Manufacturing				n.a.
Transportation				n.a.
Sub Total				n.a., about 600 employees
Total Employment	1,300		100.0%	

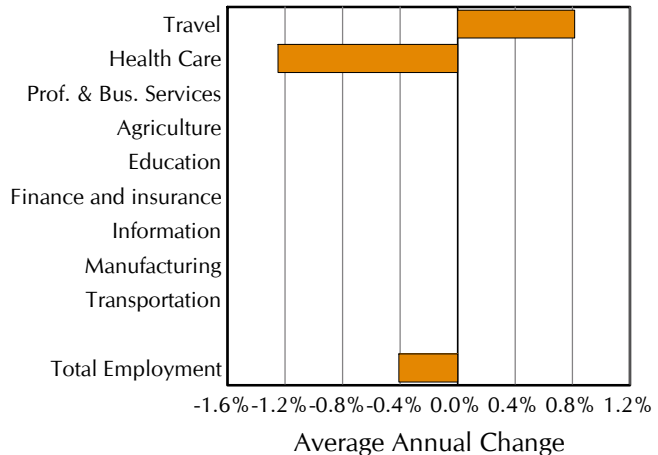
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Siskiyou County Industry Assessment

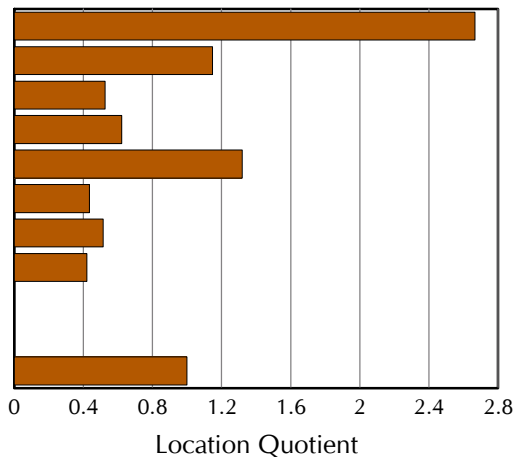
Siskiyou County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Travel	2,640	1	11.6%	
Health Care	2,180	2	9.6%	
Prof. & Bus. Services	980	3	4.3%	
Manufacturing	900	4	4.0%	Estimate
Transportation	810	5	3.6%	
Finance and insurance	430	6	1.9%	
Information	310	7	1.4%	
Education	190	8	0.8%	
Agriculture				n.a., about 2,000 to 3,000 employees
Sub Total				n.a., about 11,600 employees
Total Employment	22,700		100.0%	

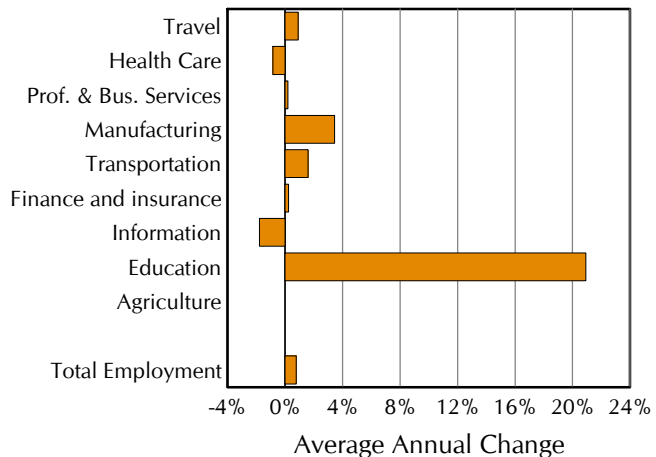
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Solano County Industry Assessment

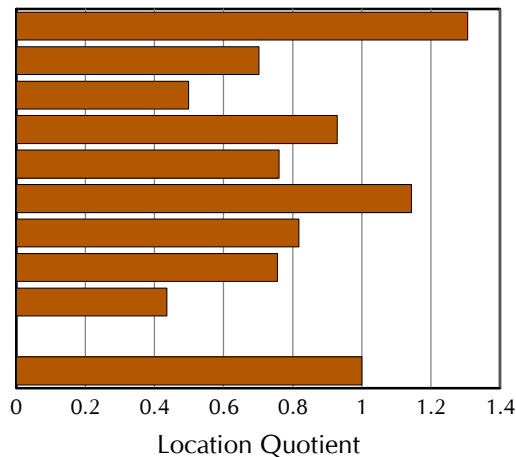
Solano County is in the Central Valley and the San Francisco Bay Area Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	19,220	1	10.9%	
Manufacturing	7,870	2	4.5%	
Prof. & Bus. Services	7,230	3	4.1%	
Travel	7,140	4	4.1%	
Finance and insurance	5,870	5	3.3%	
Transportation	5,470	6	3.1%	
Agriculture	4,420	7	2.5%	
Education	2,660	8	1.5%	
Information	2,010	9	1.1%	
Sub Total	61,890		35.2%	
Total Employment	176,000		100.0%	

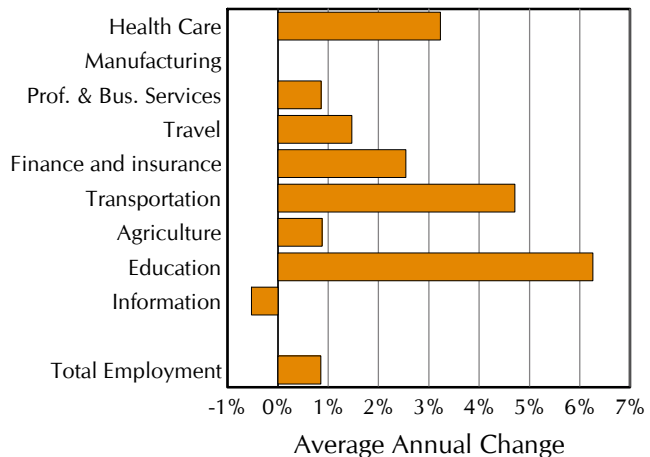
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Sonoma County Industry Assessment

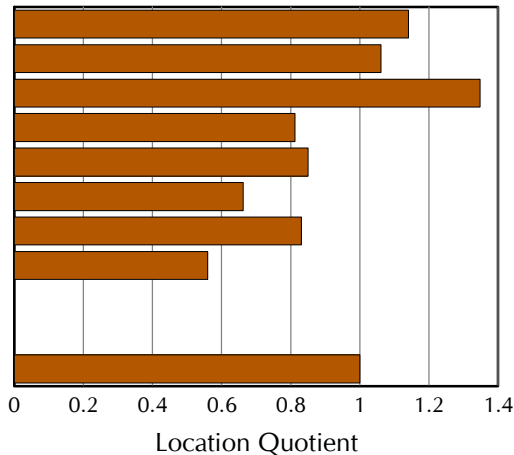
Sonoma County is in the North Coast Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	27,220	1	9.5%	
Prof. & Bus. Services	24,940	2	8.7%	
Travel	16,800	3	5.9%	
Manufacturing	14,770	4	5.2%	
Finance and insurance	10,640	5	3.7%	
Transportation	5,150	6	1.8%	
Education	4,750	7	1.7%	
Information	4,190	8	1.5%	
Agriculture				n.a., about 17,000 to 19,000 employees
Sub Total				n.a., about 126,500 employees
Total Employment	285,490		100.0%	

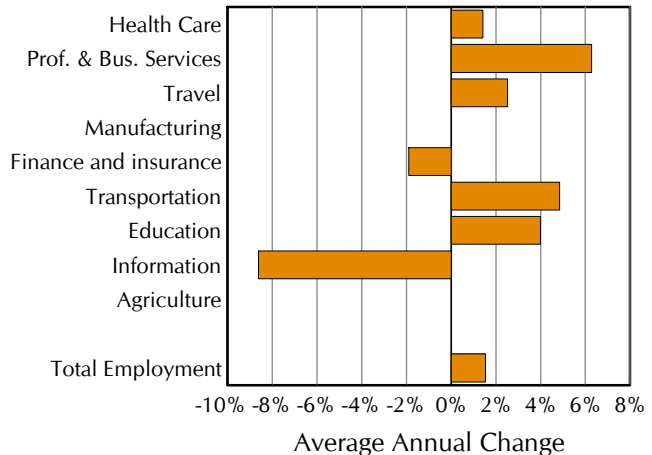
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Stanislaus County Industry Assessment

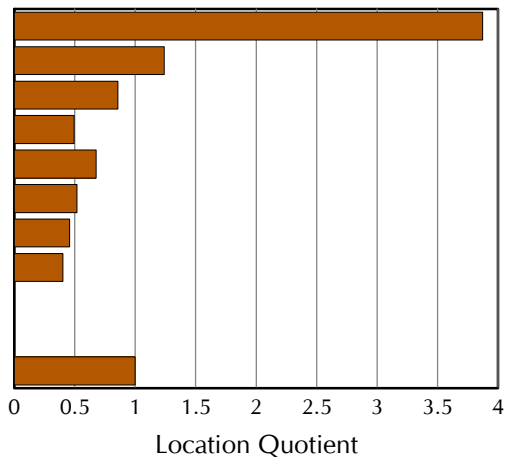
Stanislaus County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	27,240	1	11.9%	
Health Care	23,740	2	10.4%	
Manufacturing	12,500	3	5.5%	Estimate
Prof. & Bus. Services	9,310	4	4.1%	
Finance and insurance	6,800	5	3.0%	
Travel	5,190	6	2.3%	
Information	2,740	7	1.2%	
Education	1,850	8	0.8%	
Transportation				n.a., about 6,000 to 7,000 employees
Sub Total				n.a., about 96,000 employees
Total Employment	228,930		100.0%	

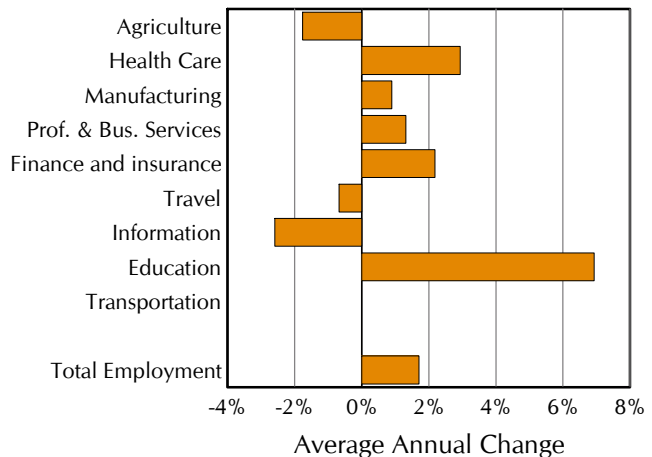
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Sutter County Industry Assessment

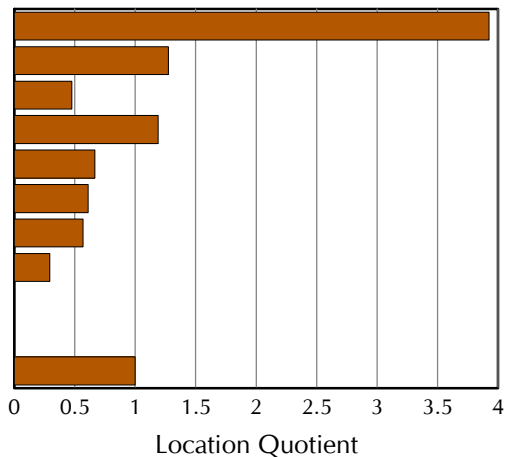
Sutter County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Agriculture	5,500	1	12.1%	Estimate
Health Care	4,860	2	10.7%	
Prof. & Bus. Services	1,790	3	3.9%	
Transportation	1,470	4	3.2%	
Finance and insurance	1,340	5	2.9%	
Travel	1,220	6	2.7%	
Education	520	7	1.1%	
Information	350	8	0.8%	
Manufacturing				n.a., about 1,100 to 1,400 employees
Sub Total				n.a., about 18,500 employees
Total Employment	45,610		100.0%	

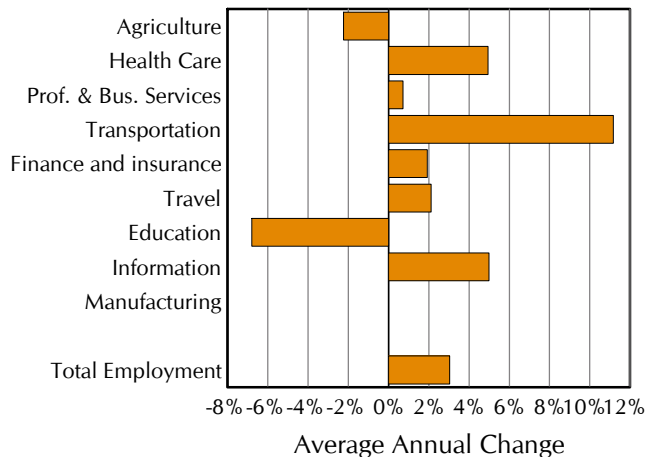
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Tehama County Industry Assessment

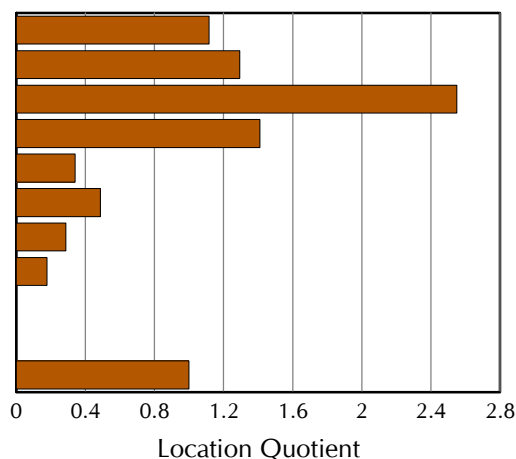
Tehama County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	2,320	1	9.3%	
Manufacturing	2,050	2	8.2%	Estimate
Transportation	1,720	3	6.9%	
Travel	1,530	4	6.1%	
Prof. & Bus. Services	700	5	2.8%	
Finance and insurance	530	6	2.1%	
Education	140	7	0.6%	
Information	120	8	0.5%	
Agriculture				n.a., more than 3,000 employees
Sub Total				n.a., about 14,000 employees
Total Employment	24,880		100.0%	

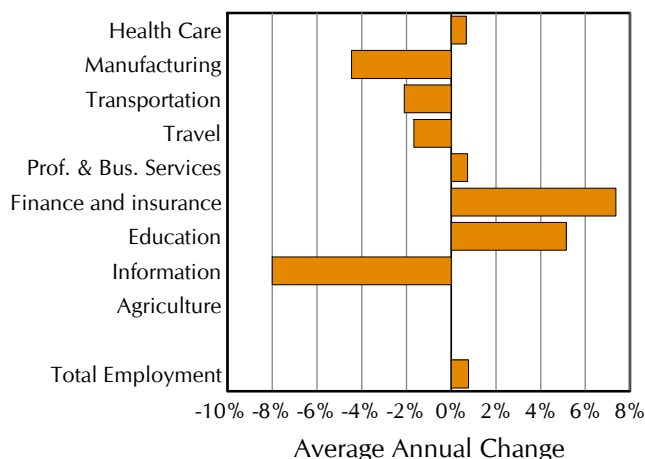
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Trinity County Industry Assessment

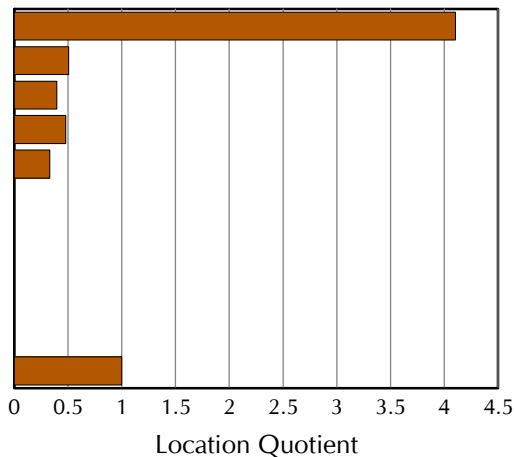
Trinity County is in the Shasta-Cascade Region.

Industry	Employment	*Rank	Percent	Notes
Travel	910	1	17.9%	
Prof. & Bus. Services	210	2	4.1%	
Finance and insurance	90	3	1.8%	
Transportation	70	4	1.4%	
Information	40	5	0.8%	
Agriculture				n.a.
Education				n.a.
Health Care				n.a.
Manufacturing				n.a., about 250 employees
Sub Total				n.a., about 2,500 employees
Total Employment	5,070		100.0%	

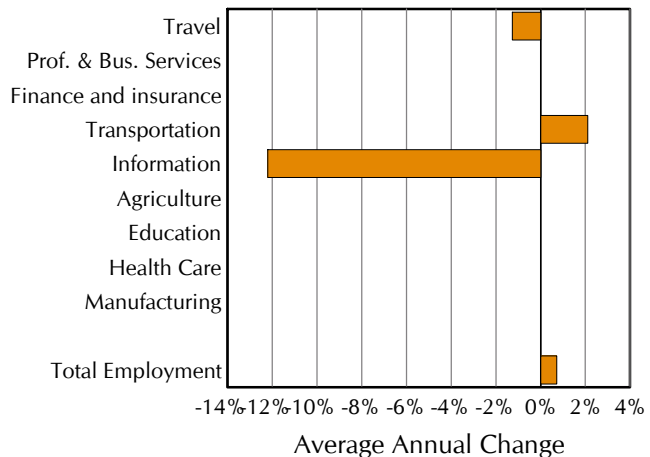
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

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**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Tulare County Industry Assessment

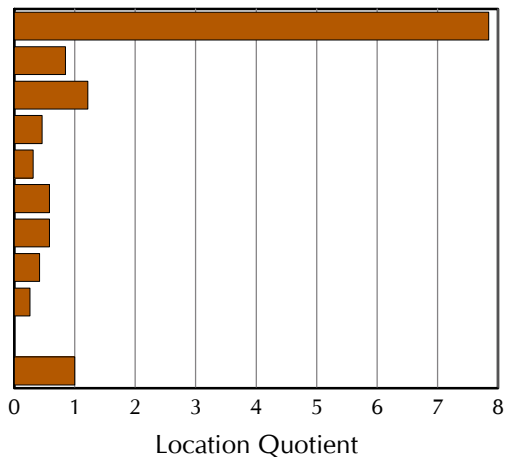
Tulare County is in the Central Valley and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Agriculture	47,800	1	24.1%	Estimate
Health Care	14,040	2	7.1%	
Transportation	6,550	3	3.3%	
Manufacturing	5,820	4	2.9%	
Prof. & Bus. Services	5,110	5	2.6%	
Finance and insurance	5,080	6	2.6%	
Travel	5,050	7	2.5%	
Education	1,670	8	0.8%	
Information	1,340	9	0.7%	
Sub Total				n.a., about 92,500 employees
Total Employment	198,330		100.0%	

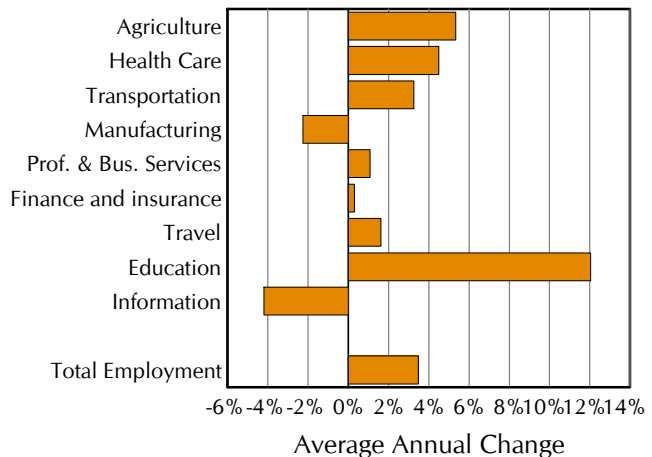
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Tuolumne County Industry Assessment

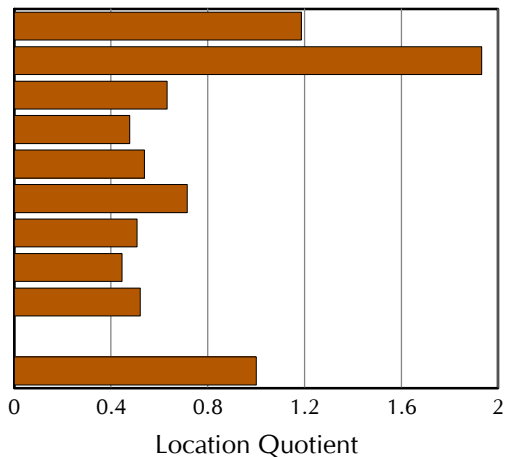
Tuolumne County is in the Central Valley and High Sierra Regions.

Industry	Employment	*Rank	Percent	Notes
Health Care	2,770	1	9.9%	
Travel	2,360	2	8.4%	
Prof. & Bus. Services	1,460	3	5.2%	
Manufacturing	850	4	3.0%	Estimate
Finance and insurance	660	5	2.4%	
Agriculture	610	6	2.2%	
Transportation	390	7	1.4%	
Information	330	8	1.2%	
Education	290	9	1.0%	
Sub Total				n.a., about 9,700 employees
Total Employment	27,950		100.0%	

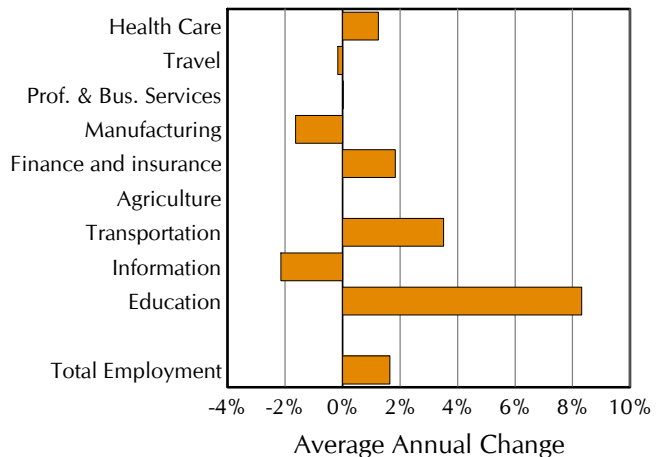
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Ventura County Industry Assessment

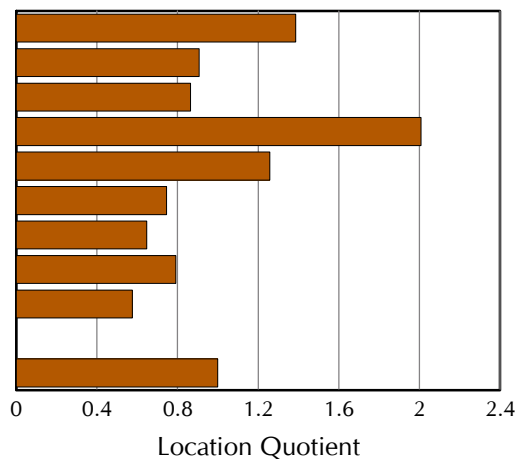
Ventura County is in the Central Coast Region.

Industry	Employment	*Rank	Percent	Notes
Manufacturing	39,370	1	8.8%	
Health Care	33,870	2	7.6%	
Prof. & Bus. Services	31,740	3	7.1%	
Agriculture	27,520	4	6.2%	
Finance and insurance	24,610	5	5.5%	
Travel	14,520	6	3.3%	
Information	7,570	7	1.7%	
Education	7,070	8	1.6%	
Transportation	6,990	9	1.6%	
Sub Total	193,250		43.3%	
Total Employment	446,220		100.0%	

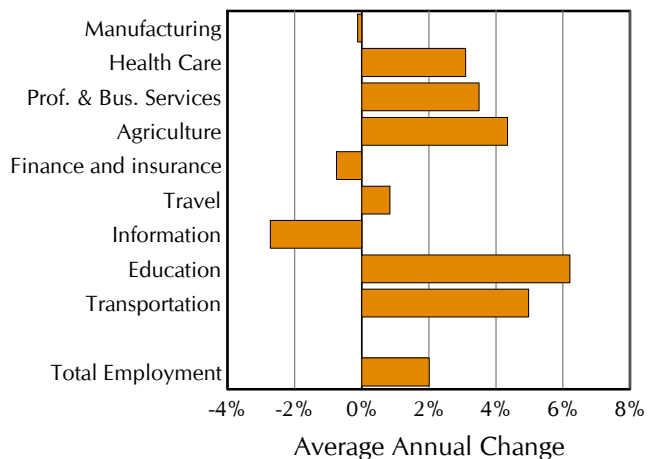
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Yolo County Industry Assessment

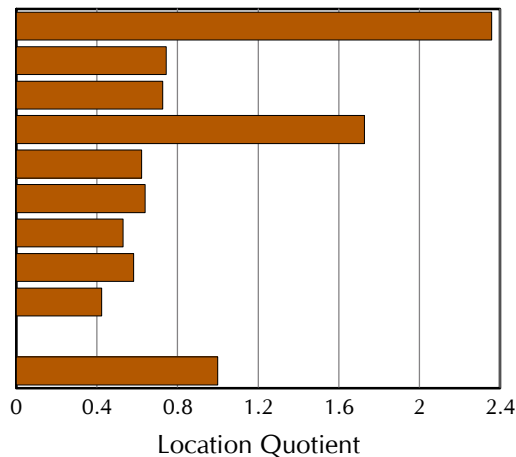
Yolo County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Transportation	8,030	1	6.4%	
Health Care	7,800	2	6.2%	
Prof. & Bus. Services	7,490	3	6.0%	
Agriculture	6,650	4	5.3%	Estimate
Manufacturing	4,960	5	4.0%	
Travel	3,500	6	2.8%	
Finance and insurance	2,910	7	2.3%	
Education	1,460	8	1.2%	
Information	1,390	9	1.1%	
Sub Total				n.a., about 44,200 employees
Total Employment	125,290		100.0%	

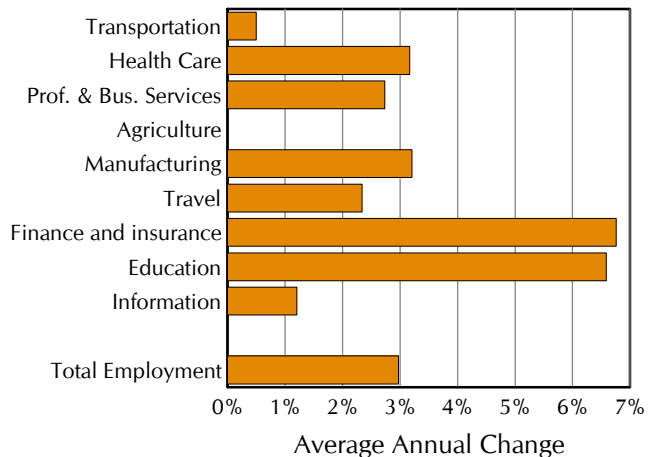
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

Yuba County Industry Assessment

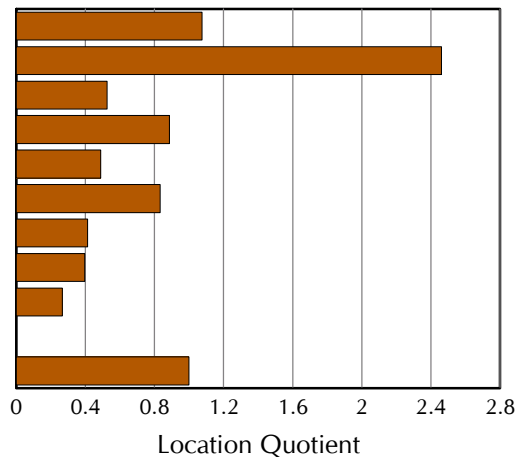
Yuba County is in the Central Valley Region.

Industry	Employment	*Rank	Percent	Notes
Health Care	2,480	1	9.0%	
Agriculture	2,080	2	7.6%	
Prof. & Bus. Services	1,190	3	4.3%	
Travel	1,070	4	3.9%	
Manufacturing	860	5	3.1%	
Transportation	620	6	2.3%	
Finance and insurance	500	7	1.8%	
Information	290	8	1.1%	
Education	150	9	0.5%	
Sub Total	9,220		33.5%	
Total Employment	27,530		100.0%	

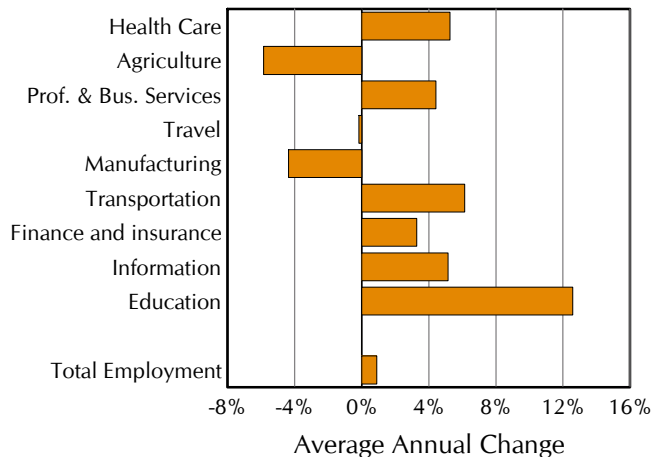
Sources and notes: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. Agriculture includes food and beverage manufacturing (NAICS 311 and 312). These industries are not included in the manufacturing sector as defined here. Employment includes wage and salary employment and proprietors.

*The Rank refers to the sector's rank within the region. Sectors where estimates are not available due to data limitations are denoted *n.a.* These sectors are not included in the rankings. Sectors denoted by "Estimate" represent sectors where the estimated portion of total employment is less than 10% of the sector total. These sectors are included in the rankings.

**Location Quotient
2007**



**Average Annual Employment Change
2004-2007**



Notes: A location quotient value of greater than "1" indicates an above average concentration of that industry relative to the state of California. A value below "1" indicates a below average concentration. In general, a higher value location quotient would indicate that a larger proportion of the given industry is export-oriented. (This does not apply to Travel, Agriculture and Manufacturing which are predominantly export-oriented in all counties.)

APPENDIX

A brief overview of the procedures used to regional employment estimates is provided below. A table describing the total employment and earnings of the major industry sectors of the California economy is presented on the following page.

EMPLOYMENT ESTIMATES

Total employment estimates by the Bureau of Economic Analysis were the primary source data for all industry sectors except travel. In cases where county level data was not disclosed for an industry, county by industry estimates were made based on the following information

- Reported estimates from other years, if available
- Reported payroll employment for related NAICS industries from the Bureau of Labor Statistics Census of Employment and Wages data (CEW), if available
- Reported establishment counts for that industry from the Bureau of Labor Statistics Census of Employment and Wages data (CEW)
- Statewide totals.

Travel industry total employment for 2007 was taken from *California Travel Impacts by County*, prepared by Dean Runyan Associates for the California Travel and Tourism Commission.

REGIONAL ESTIMATES

The county estimates of total employment for the nine industry sectors were aggregated to represent the twelve tourism regions. Six of these regions were comprised of at least one sub-county area.³ For these regions sub-county employment estimates were made. The regional travel industry employment estimates were based on the geographic distribution of lodging sales and population. The regional employment estimates for the other industry sectors were based on the geographic distribution of population.

³ These regions were the San Francisco Bay Area, the Central Valley, the Gold Country, the High Sierra, the Deserts, and the Inland Empire.

APPENDIX

California Earnings and Employment by Industry Sector, 2007

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	154,411	13.2%	2,083	9.8%
Agriculture, Forestry, Fishing and related	15,977	1.4%	487	2.3%
Mining	4,624	0.4%	43	0.2%
Manufacturing (incl. Food & Bev. Proc.)	133,810	11.5%	1,553	7.3%
**Travel	30,355	2.6%	928	4.4%
Primarily Local/Regional	543,706	46.7%	11,161	52.6%
Construction	75,582	6.5%	1,261	5.9%
Utilities	12,036	1.0%	60	0.3%
Wholesale trade	59,582	5.1%	818	3.9%
Retail trade	73,994	6.3%	2,154	10.1%
Real estate and rental and leasing	32,397	2.8%	1,312	6.2%
Management of companies and enterprises	22,431	1.9%	219	1.0%
Administrative and waste services	45,021	3.9%	1,381	6.5%
Other services, except public administration	32,371	2.8%	1,237	5.8%
Government and government enterprises	190,291	16.3%	2,718	12.8%
Mixed	467,322	40.1%	7,995	37.6%
Transportation and warehousing	32,149	2.8%	585	2.8%
Information	58,226	5.0%	557	2.6%
Finance and insurance	79,853	6.9%	932	4.4%
Prof., tech. and business services	139,529	12.0%	1,749	8.2%
Educational services	13,445	1.2%	421	2.0%
Health care and social assistance	93,489	8.0%	1,775	8.4%
Leisure and Hospitality	50,631	4.3%	1,975	9.3%
California Total**	1,165,439	100.0%	21,239	100.0%

Source: Bureau of Economic Analysis and Dean Runyan Associates.

**Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).