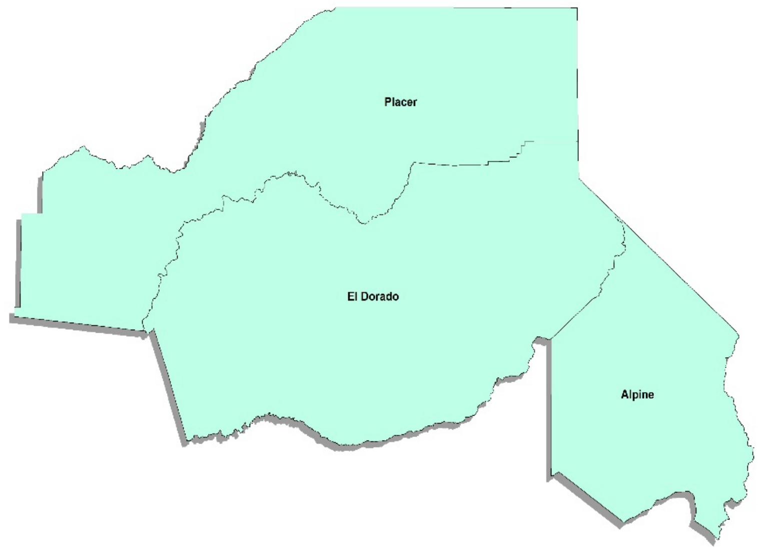
Golden Sierra Workforce Board
Industry Clusters of Opportunity 2010-2015

Overview

This report was prepared by the Labor Market Information Division (LMID) of the California Employment Development Department to provide the Golden Sierra Workforce Board (Golden Sierra) a resource for workforce development and planning. The findings were derived from the most detailed industry data available from the Quarterly Census of Employment and Wages program, which provides the number of businesses, number of jobs, and total payroll for workers covered by unemployment insurance programs from reports filed by California employers each quarter. Only private, non-government, industries are included in this study.



An industry cluster describes a specific clustering of companies with highly similar business activities. These businesses are economically interdependent and may have common supply chains, labor needs, technologies, and markets. Industry clusters identified in Golden Sierra are those that demonstrated the greatest opportunity for new jobs, rising wages, business expansion, and career development possibilities. The LMID aggregated nine regional industry clusters for Golden Sierra, which comprised of 159 industries. These industry clusters include (in order of size by total number of jobs):

- Healthcare and Social Assistance
- Arts, Entertainment, and Recreation
- Building and Systems Construction
- Business Management and Support
- Investment Support
- Information Technology and Telecommunications
- Manufacturing
- Transportation, Warehousing, and Logistics
- Agribusiness, Food and Beverage Production

Golden Sierra Industry Cluster Overview (continued)

During the study period, 2010 through 2015, the nine industry clusters demonstrated a combination of:

1. Expanded opportunity (job and/or firm growth).
2. Increased wages.
3. Improved competitiveness (strong or growing concentration of jobs compared to California as a whole).
4. Expanded career opportunities (distribution of job opportunities across the occupational spectrum).

Collectively, these industry clusters comprised 69.2 percent of the total regional jobs in 2015, and 72.8 percent of the region's total wages. The total number of jobs and total wages increased in the region over the study period. The Healthcare and Social Assistance industry cluster was the largest cluster in 2015, providing 31,435 jobs, or 16.2 percent of the region's total employment. The highest annual average wages were reported in the Information Technology and Telecommunications, at $86,966. Investment Support posted the highest employment concentration at 1.66, and the second highest annual average wage of $74,845.

Golden Sierra County Industry Cluster Descriptions

The **Healthcare and Social Assistance** industry cluster provided 31,289 jobs in 2015 among health care providers and other health related services. These firms made up 16.1 percent of the total regional employment. Firms include:

- Health and Personal Care Stores
- Home Health Care Services
- General Medical and Surgical Hospitals
- Nursing Care Facilities
- Psychiatric, Substance Abuse, and Specialty Hospitals

The **Arts, Entertainment, and Recreation** industry cluster includes firms engaged in cultural, entertainment, and recreational activities. This cluster's employment in 2015 stood at 29,024 and comprised 14.9 percent of the region's total employment. Firms include:

- Performing Arts, Spectator Sports, and Related Industries
- Amusement, Gambling, and Recreation Industries
- Accommodation
- Museums, Historical Sites, and Similar Institutions
- Food Services and Drinking Places

The **Building and Systems Construction** industry cluster includes firms primarily engaged in the construction of buildings and infrastructure projects such as highways. It also includes firms which prepare sites for new construction, wood product manufacturers, nonmetallic mineral product manufacturers, as well as support activities. This cluster employed 21,627 people, or 11.1 percent of the region's total employment. Firms include:

- Residential and Nonresidential Building Construction
- Specialty Trade Contractors
- Petroleum and Coal Products Manufacturing
- Lumber and Other Construction Materials Merchant Wholesalers
- Lawn and Garden Equipment and Supplies Stores
- Waste Management and Remediation Services

The **Business Management and Support** industry cluster provided 17,155 jobs among businesses involved in accounting, legal services, employment services, consulting services, and waste remediation activities. These firms made up 8.8 percent of total regional employment in 2015. Firms include:

- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Management, Scientific, and Technical Consulting Services
- Office of Administrative Services
- Management of Companies and Enterprises
- Legal Services
- Waste Collection
- Waste Treatment and Disposal

Golden Sierra Industry Cluster Descriptions (continued)

The **Investment Support** industry cluster includes firms primarily engaged in finance, insurance, and real estate. This cluster employed 14,490 in 2015, and comprised 7.5 percent of the region's total employment. Firms include:

- Depository and Nondepository Credit Intermediation
- Other Financial Investment Activities
- Insurance Carriers
- Real Estate Services

The **Information Technology and Telecommunications** industry cluster contains businesses involved in computer and electronic product manufacturing, broadcasting, telecommunications, data processing, computer systems design, and scientific related services. The cluster employed 10,206 workers, and provided 5.3 percent of total regional jobs in 2015. Firms include:

- Computer and Electronic Product Manufacturing
- Telecommunications
- Motion Picture and Video Industries
- Software Publishers and Data Processing
- Scientific Research and Development
- Architectural, Engineering, and Related Services
- Computer Systems Design and Related Services

The **Manufacturing** industry cluster contains businesses engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. These businesses are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment, or sell the products made at these locations. This industry cluster employed 5,036 workers, and provided 2.6 percent of regional jobs in 2015. Firms include:

- Textile Product Mills
- Chemical Manufacturing
- Printing and Related Support Activities
- Machinery Manufacturing
- Fabricated Metals
- Durable and Nondurable Goods Merchant Wholesalers

The **Transportation and Logistics** industry cluster contains businesses involved in transportation and supporting industries, such as long distance and specialized freight trucking, courier services, warehousing, and storage. The industry cluster employed 4,812 workers and provided 2.5 percent of the region's total employment in 2015. Firms include:

- Motor Vehicle Parts Manufacturing
- General Freight Trucking
- Taxi and Limousine Service
- Couriers and Messengers

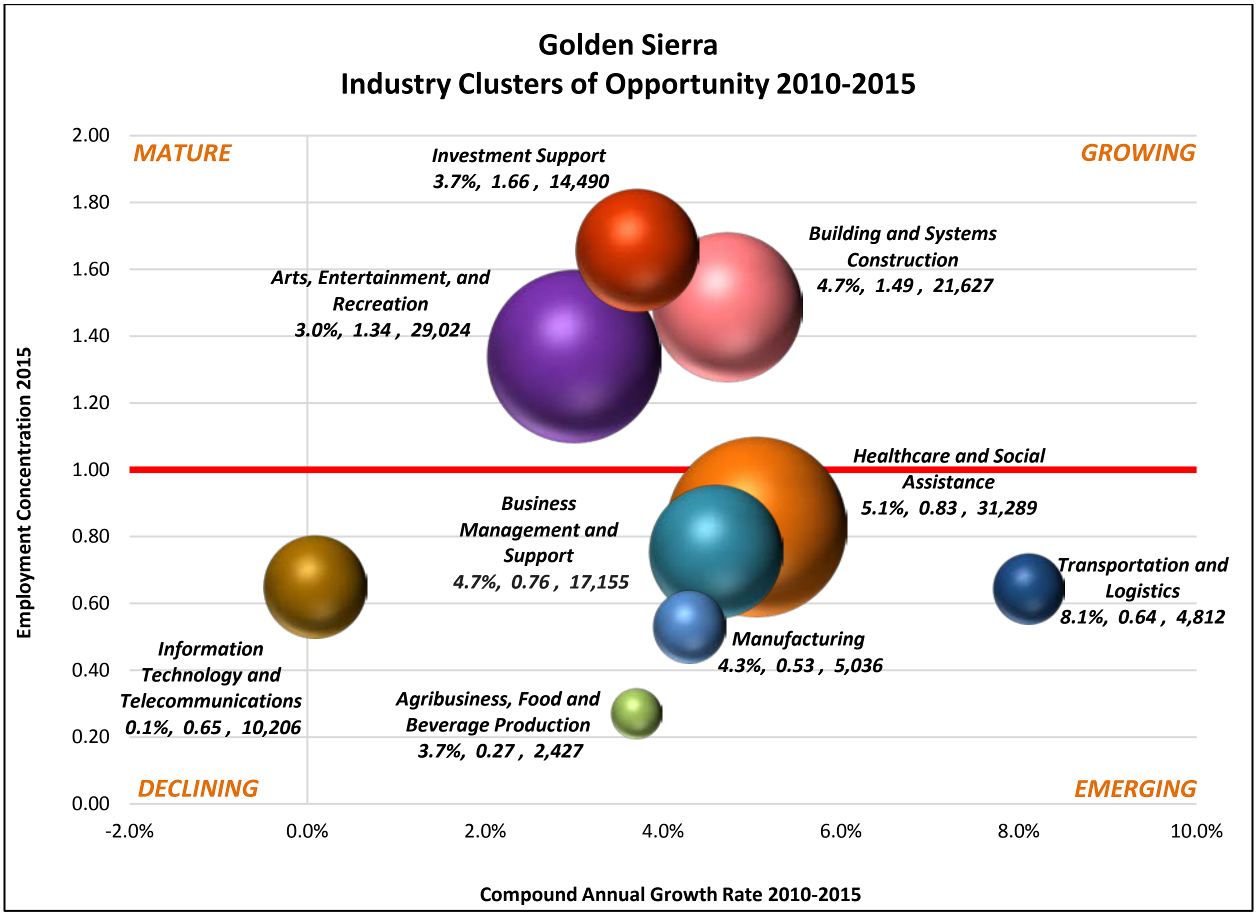
Golden Sierra Industry Cluster Descriptions (continued)

The **Agribusiness, Food and Beverage Production** industry cluster includes establishments primarily engaged in growing crops, raising animals, and manufacturing food and beverages, as well as support activities. This cluster employed 2,427 workers in 2015, and comprised 1.2 percent of total regional employment. Firms include:

- Oilseed and Grain Farming
- Vegetable and Melon Farming
- Fruit and Tree Nut Farming
- Greenhouse, Nursery, ant Floriculture Production
- Animal Production and Aquaculture
- Food and Beverage Manufacturing
- Support Activities for Crop Production
- Support Activities for Animal Production
- Specialty Food Stores

Golden Sierra Industry Clusters 2010-2015

The chart below is a visual representation of the Golden Sierra Industry Clusters. Each bubble represents regional industry clusters and displays three important data elements: 2010-2015 compound annual growth rate, 2015 employment concentration, and 2015 employment size.



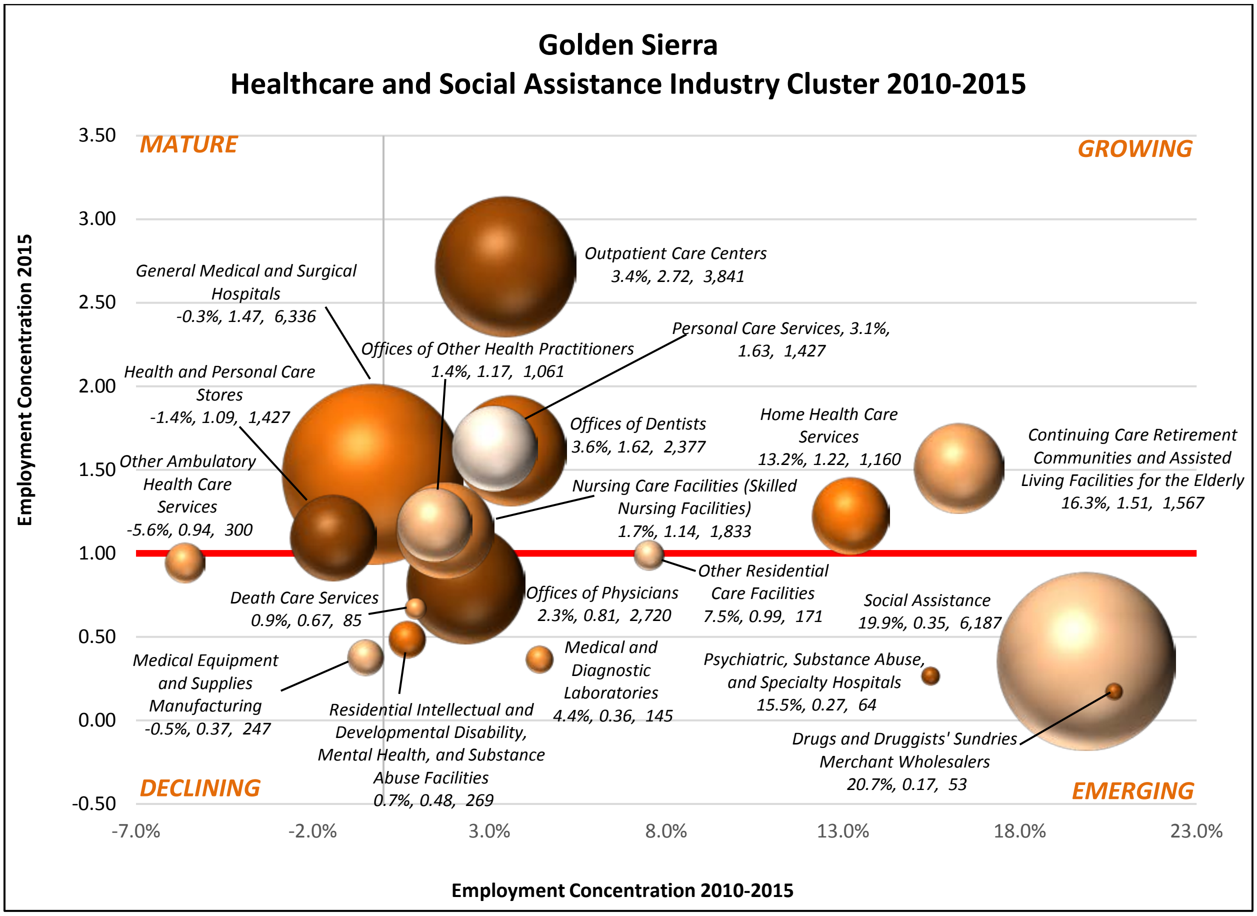
Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Interpreting the Chart:

- Each bubble's position on the horizontal axis represents the level of employment growth experienced by that industry cluster from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss.
- Each bubble's position on the vertical axis represents the employment concentration for that industry cluster in 2015 relative to California. Employment concentration, also called Location Quotient (LQ), is used to measure an industry cluster's strength and activity level by comparing its employment size to that of a larger area, usually the state or the nation. This study compares regional employment concentration to the California average. A concentration greater than 1.0 indicates a higher concentration of jobs in the industry cluster than found statewide, and industry clusters with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. Industry clusters with higher location quotients generally consist of export industries, and are the region's strong economic sectors. In theory, they are producing more goods and services than the region alone can consume and thus export the excess goods or services to consumers in areas outside of the region and bring wealth back to the local economy.
- The size of the bubble indicates the employment (number of jobs) in that industry cluster in 2015.

Healthcare and Social Assistance Industry Cluster

The Healthcare and Social Assistance industry cluster had 31,289 employees in 2015, grew by 5.1 percent per year, and reported an employment concentration of 0.83. The annual average wages in 2015 were $56,878, above the region's annual average wage of $48,745. The largest industry was General Medical and Surgical Hospitals, which provided 6,336 jobs. Vocational Rehabilitation Services posted the largest employment concentration at 2.92. Individual and Family Services grew the fastest at 36.9 percent annually. Outpatient Care Centers reported the highest annual average wage in 2015 at $115,421, well over the regions annual average wage of $48,745.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Healthcare and Social Assistance Industry Cluster – Summary Table

HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
3391	Medical Equipment and Supplies Manufacturing	252	247	-0.5%	$55,490	$56,487	0.42	0.37	0.1%	0.1%
4242	Drugs and Druggists' Sundries Merchant	25	53	20.7%	$71,384	$71,610	0.09	0.17	0.0%	0.0%
4461	Health and Personal Care Stores	1,531	1,446	-1.4%	$41,046	$38,604	1.25	1.09	0.9%	0.7%
6211	Offices of Physicians	2,481	2,720	2.3%	$85,356	$100,797	0.83	0.81	1.4%	1.4%
6212	Offices of Dentists	2,063	2,377	3.6%	$49,519	$46,511	1.55	1.62	1.2%	1.2%
6213	Offices of Other Health Practitioners	1,002	1,061	1.4%	$34,430	$33,585	1.31	1.17	0.6%	0.5%
6214	Outpatient Care Centers	3,354	3,841	3.4%	$106,729	$115,421	2.88	2.72	1.9%	2.0%
6215	Medical and Diagnostic Laboratories	122	145	4.4%	$45,631	$49,206	0.33	0.36	0.1%	0.1%
6216	Home Health Care Services	706	1,160	13.2%	$39,624	$43,552	0.93	1.22	0.4%	0.6%
6219	Other Ambulatory Health Care Services	378	300	-5.6%	$40,992	$47,897	1.31	0.94	0.2%	0.2%
6221	General Medical and Surgical Hospitals	6,416	6,336	-0.3%	$71,251	$79,693	1.52	1.47	3.7%	3.3%
6222 6223	Psychiatric, Substance Abuse, and Specialty Hospitals	36	64	15.5%	$25,609	$31,660	0.17	0.27	0.0%	0.0%

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Healthcare and Social Assistance Industry Cluster (continued) – Summary Table

HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER (continued) Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1,711	1,833	1.7%	$32,967	$ 34,935	1.19	1.14	1.0%	0.9%
6232	Residential Intellectual and Developmental Disability, Mental	262	269	0.7%	$32,032	$ 28,632	0.50	0.48	0.2%	0.1%
6233	Continuing Care Retirement Communities and Assisted Living	857	1,567	16.3%	$23,399	$ 23,370	1.03	1.51	0.5%	0.8%
6239	Other Residential Care Facilities	128	171	7.5%	$30,413	$ 27,056	0.72	0.99	0.1%	0.1%
624	Social Assistance	2,996	6,187	19.9%	$25,250	$19,845	1.16	0.35	1.7%	3.2%
8121	Personal Care Services	1,261	1,427	3.1%	$15,791	$17,284	1.78	1.63	0.7%	0.7%
8122	Death Care Services	82	85	0.9%	$34,042	$34,970	0.71	0.67	0.0%	0.0%
HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER SUMMARY		***25,663***	***31,289***	***5.1%***	***$57,640***	***$56,878***	***1.25***	***0.83***	***14.8%***	***16.1%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Arts, Entertainment, and Recreation Industry Cluster

The Arts, Entertainment, and Recreation industry cluster provided 29,024 jobs, grew by 3.0 percent annually, and had an employment concentration of 1.34. The cluster posted 2015 annual average wages of $19,716. Among the industries that made up the cluster, Restaurants and Other Eating Places reported the largest employment with 18,224 workers, and represented 63 percent of the cluster's employment. Travel Arrangement and Reservation Services posted the highest annual average wage in 2015 at $44,734. Leading the cluster in growth rates were Special Food Services and Drinking Places (Alcoholic Beverages) at 13.6 percent and 13.4 percent, respectively. RV Parks and Recreational Camps had the highest employment concentration at 3.54.

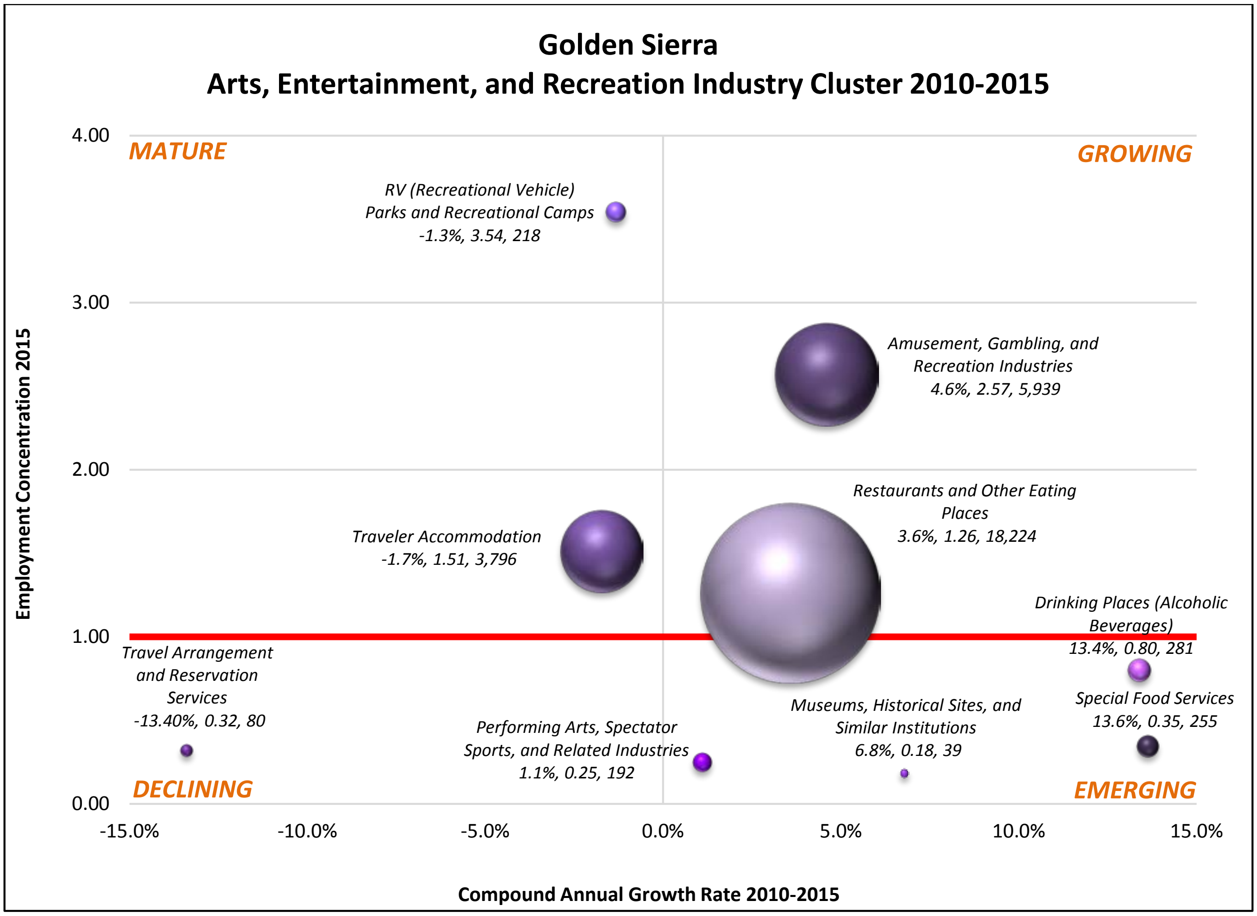


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Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

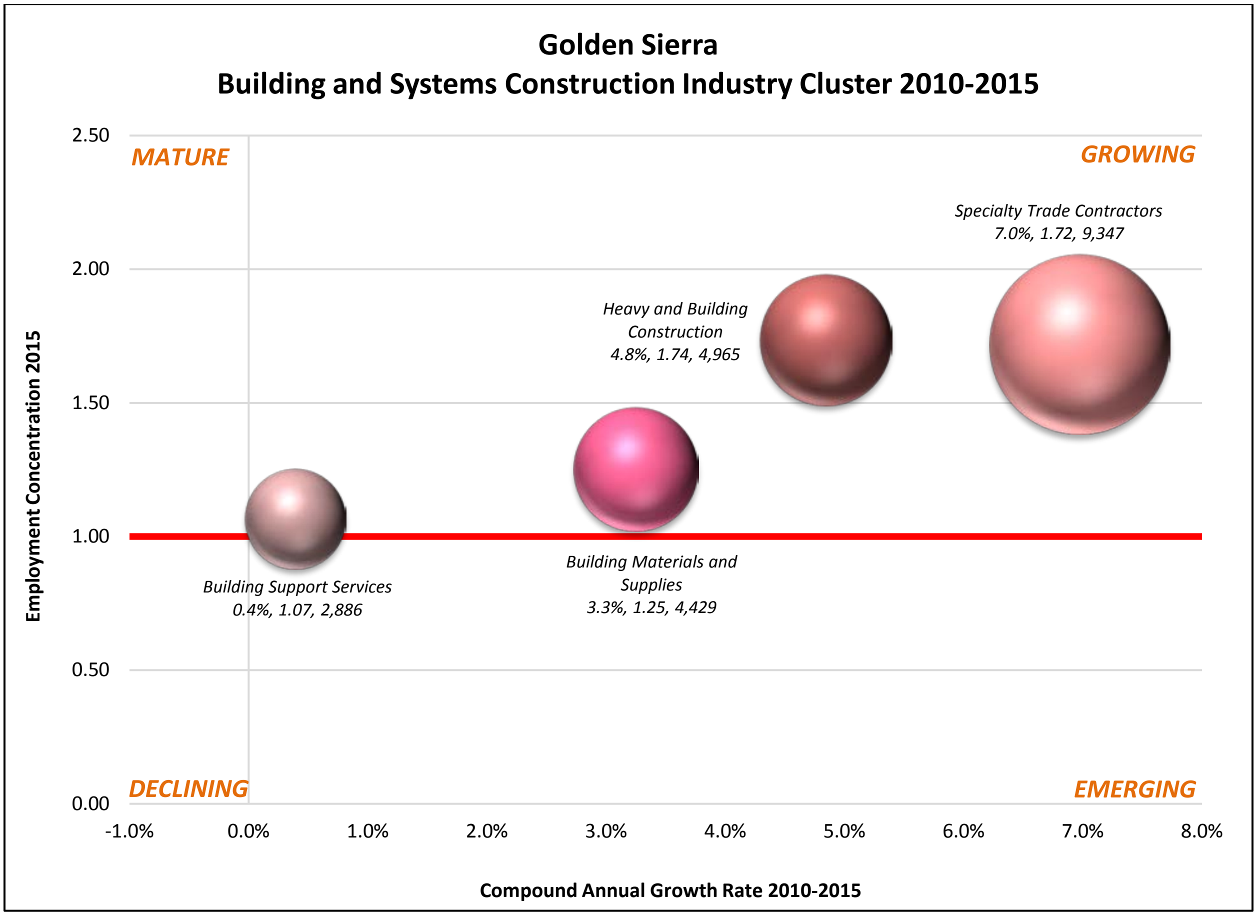
Arts, Entertainment, and Recreation Industry Cluster – Summary Table

ARTS, ENTERTAINMENT, AND RECREATION INDUSTRY CLUSTER Golden Sierra NAICS Code	Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
5615	**Travel Arrangement and Reservation Services**	142	80	-13.4%	$49,875	$44,734	0.60	0.32	0.1%	0.0%
711	**Performing Arts, Spectator Sports, and Related Industries**	184	192	1.1%	$25,319	$24,584	0.29	0.25	0.1%	0.1%
7121	**Museums, Historical Sites, and Similar Institutions**	30	39	6.8%	$33,182	$25,202	0.17	0.18	0.0%	0.0%
713	**Amusement, Gambling, and Recreation Industries**	4,970	5,939	4.6%	$19,985	$23,834	2.47	2.57	2.9%	3.1%
7211	**Traveler Accommodation**	4,070	3,796	-1.7%	$24,958	$24,599	1.79	1.51	2.4%	2.0%
7212	**RV (Recreational Vehicle) Parks and Recreational Camps**	230	218	-1.3%	$24,982	$24,795	4.33	3.54	0.1%	0.1%
7223	**Special Food Services**	153	255	13.6%	$21,850	$22,273	0.28	0.35	0.1%	0.1%
7224	**Drinking Places (Alcoholic Beverages)**	170	281	13.4%	$12,196	$14,259	0.58	0.80	0.1%	0.1%
7225	**Restaurants and Other Eating Places**	15,830	18,224	3.6%	$16,319	$17,171	1.34	1.26	9.2%	9.4%
ARTS, ENTERTAINMENT, AND RECREATION INDUSTRY CLUSTER SUMMARY		***25,779***	***29,024***	***3.0%***	***$18,742***	***$19,716***	***1.42***	***1.34***	***14.9%***	***14.9%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Building and Systems Construction Industry Cluster

The Building and Systems Construction industry cluster had 21,627 employees, grew by 4.7 percent annually, and showed an employment concentration of 1.49. The cluster posted 2015 annual average wages of $50,728, above the region's total industry annual average wage of $48,745. This industry is comprised of four sub-clusters: Building Material and Supplies, Specialty Trade Contractors, Heavy and Building Construction, and Building Support Services. Building Equipment Contractors, part of the Specialty Trade Contractors sub-cluster, posted the largest employment with 3,577 employees. Within the Building Materials and Supplies sub-cluster, Forest Nurseries, Gathering of Forest Products, and Support Activities for Forestry reported the largest employment concentration at 6.89, and largest growth rate at 80.7 percent annually. Petroleum and Coal Products Manufacturing provided the highest annual average wages in 2015 at $120,575.



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Construction and Support Services Industry Cluster – Summary Table

BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
Specialty Trade Contractors										
2381	Foundation, Structure, and Building Exterior Contractors	2,062	2,895	8.9%	$44,785	$44,464	2.39	2.62	1.2%	1.5%
2382	Building Equipment Contractors	2,875	3,577	5.6%	$58,293	$54,883	1.64	1.58	1.7%	1.8%
2383	Building Finishing Contractors	1,134	1,486	7.0%	$38,609	$39,285	1.04	1.10	0.7%	0.8%
2389	Other Specialty Trade Contractors	1,067	1,389	6.8%	$66,411	$66,043	1.85	1.93	0.6%	0.7%
Specialty Trade Contractors Summary		*7,138*	*9,347*	*7.0%*	*$52,477*	*$50,835*	*1.67*	*1.72*	*4.1%*	*4.8%*
Heavy and Building Construction										
2361	Residential Building Construction	1,949	2,593	7.4%	$53,570	$53,834	2.10	2.22	1.1%	1.3%
2362	Nonresidential Building Construction	1,238	1,198	-0.8%	$88,887	$65,918	1.96	1.60	0.7%	0.6%
2371	Utility System Construction	208	403	18.0%	$55,429	$60,152	0.57	0.82	0.1%	0.2%
2372	Land Subdivision	162	181	2.8%	$75,268	$76,349	1.71	1.90	0.1%	0.1%
2373	Highway, Street, and Bridge Construction	401	456	3.3%	$74,253	$70,772	1.74	1.73	0.2%	0.2%
2379	Other Heavy and Civil Engineering Construction	151	134	-2.9%	$56,308	$67,389	1.83	1.40	0.1%	0.1%
Heavy and Building Construction Summary		*4,109*	*4,965*	*4.8%*	*$67,279*	*$60,005*	*1.76*	*1.74*	*2.4%*	*2.6%*

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Construction and Support Services Industry Cluster (continued) – Summary Table

BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER (continued) Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
Building Materials and Supplies										
1132 1153	Forest Nurseries, Gathering of Forest Products, and Support Activities for Forestry	18	192	80.7%	$25,935	$54,680	0.70	6.89	0.0%	0.1%
1133	Logging	44	67	11.1%	$38,672	$54,892	2.03	2.73	0.0%	0.0%
2123	Nonmetallic Mineral Mining and Quarrying	28	26	-1.8%	$49,266	$62,658	0.52	0.48	0.0%	0.0%
2131	Support Activities for Mining	33	90	28.5%	$71,070	$81,836	0.25	0.57	0.0%	0.0%
321 322	Wood Product and Paper Manufacturing	697	557	-5.5%	$50,921	$49,255	1.38	1.06	0.4%	0.3%
3241	Petroleum and Coal Products Manufacturing	16	30	17.0%	$70,126	$120,575	0.09	0.19	0.0%	0.0%
327	Nonmetallic Mineral Product Manufacturing	375	311	-4.6%	$61,601	$44,081	1.10	0.84	0.2%	0.2%
4233	Lumber and Other Construction Materials Merchant Wholesalers	256	259	0.3%	$49,325	$46,947	1.26	1.12	0.1%	0.1%
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	447	481	1.8%	$50,573	$48,745	1.63	1.63	0.3%	0.2%
4441	Building Material and Supplies Dealers	1,558	1,884	4.9%	$35,611	$31,266	1.32	1.41	0.9%	1.0%

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Building and Systems Construction Industry Cluster (continued) – Summary Table

BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER (continued) Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	**Industry Description**									
	Building Materials and Supplies (continued)									
4442	**Lawn and Garden Equipment and Supplies Stores**	327	435	7.4%	$26,181	$27,940	2.86	3.04	0.2%	0.2%
5324	**Commercial and Industrial Machinery and Equipment Rental and Leasing**	93	97	1.1%	$46,639	$56,883	0.55	0.45	0.1%	0.0%
Building Materials and Supplies Summary		***3,892***	***4,429***	***3.3%***	***$43,479***	***$40,667***	***1.22***	***1.25***	***2.3%***	***2.3%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

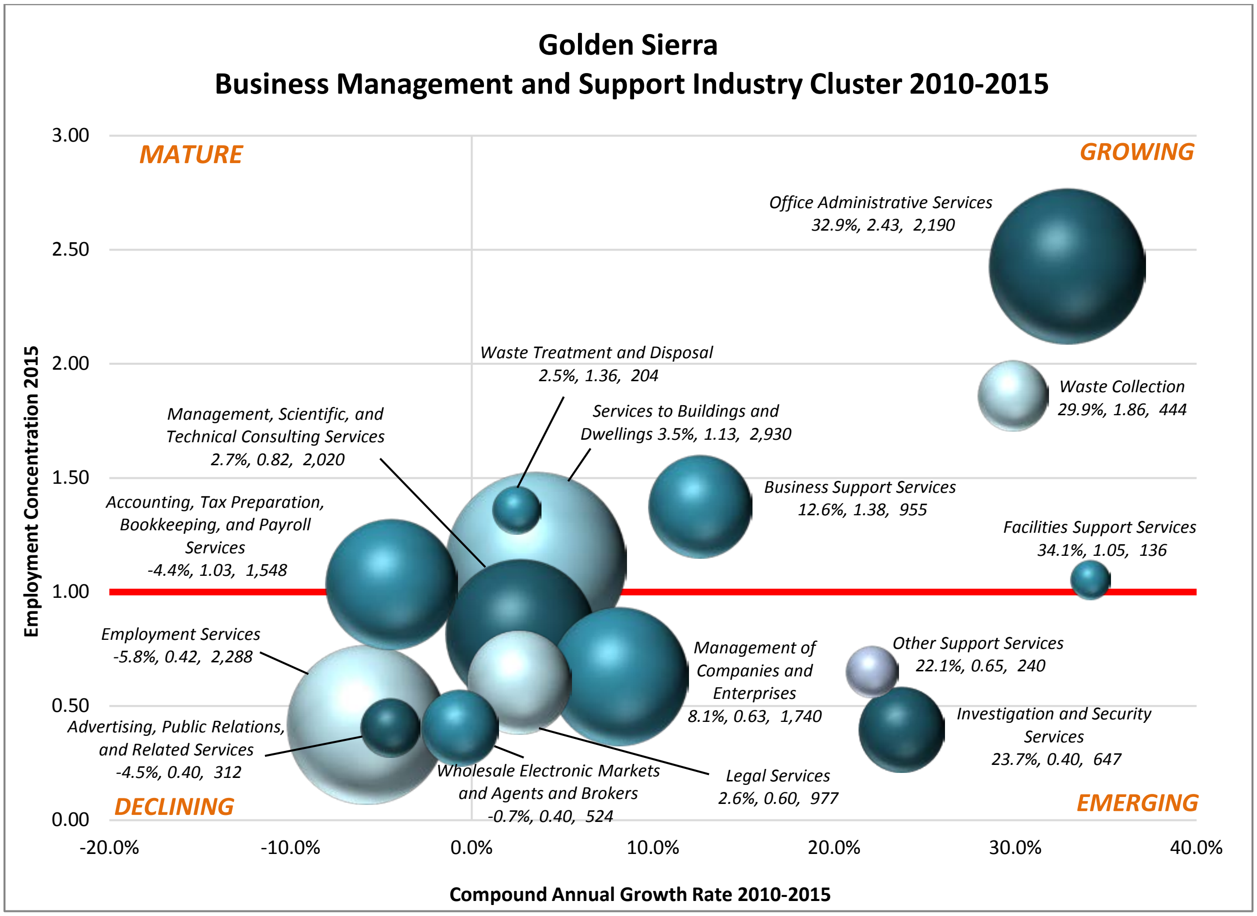
Building and Systems Construction Industry Cluster (continued) – Summary Table

BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER (continued) Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	**Industry Description**									
Building and Support Services										
2211	Electric Power Generation, Transmission and Distribution	95	132	8.6%	$95,979	$88,989	0.36	0.58	0.1%	0.1%
2213	Water, Sewage and Other Systems	52	51	-0.5%	$41,256	$42,121	0.95	0.81	0.0%	0.0%
4232	Furniture and Home Furnishing Merchant Wholesalers	14	8	-13.1%	$40,934	$41,344	0.07	0.03	0.0%	0.0%
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	301	222	-7.3%	$60,789	$65,528	0.57	0.39	0.2%	0.1%
4421	Furniture Stores	349	295	-4.1%	$30,673	$39,245	1.36	1.19	0.2%	0.2%
4422	Home Furnishings Stores	692	967	8.7%	$34,897	$29,324	2.09	2.53	0.4%	0.5%
4431	Electronics and Appliance Stores	883	805	-2.3%	$46,998	$67,734	1.15	1.08	0.5%	0.4%
5323	General Rental Centers	74	84	3.2%	$52,357	$53,935	1.40	1.77	0.0%	0.0%
5629	Remediation and Other Waste Management Services	381	322	-4.1%	$48,263	$50,111	2.80	1.80	0.2%	0.2%
Building and Support Services Summary		***2,841***	***2,886***	***0.4%***	***$45,318***	***$49,861***	***1.10***	***1.07***	***1.6%***	***1.5%***
BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER SUMMARY		***17,980***	***21,627***	***4.7%***	***$52,781***	***$50,728***	***1.45***	***1.49***	***10.4%***	***11.1%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Business Management and Support Industry Cluster

The Business Management and Support industry cluster provided 17,155 jobs, grew by 4.7 percent annually, and had an employment concentration of 0.76. The cluster recorded annual average wages of $54,236. The largest industry was Services to Buildings and Dwellings with 2,930 employees. Management of Companies and Enterprises reported the highest wages in 2015 at $97,492. Facilities Support Services recorded the largest growth rate at 34.1 percent annually. Office Administrative Services recorded the highest employment concentration rate of 2.43, and the second highest growth rate at 32.9 percent annually.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Business Management and Support Industry Cluster – Summary Table

BUSINESS MANAGEMENT AND SUPPORT INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
4251	Wholesale Electronic Markets and Agents and Brokers	538	524	-0.7%	$60,357	$77,141	0.49	0.40	0.3%	0.3%
5411	Legal Services	881	977	2.6%	$61,930	$62,734	0.56	0.60	0.5%	0.5%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,855	1,548	-4.4%	$61,038	$56,652	1.39	1.03	1.1%	0.8%
5416	Management, Scientific, and Technical Consulting Services	1,817	2,020	2.7%	$63,187	$63,940	0.91	0.82	1.1%	1.0%
5418	Advertising, Public Relations, and Related Services	375	312	-4.5%	$53,699	$55,792	0.56	0.40	0.2%	0.2%
5511	Management of Companies and Enterprises	1,273	1,740	8.1%	$80,045	$97,492	0.55	0.63	0.7%	0.9%
5611	Office Administrative Services	703	2,190	32.9%	$50,470	$65,479	0.83	2.43	0.4%	1.1%
5612	Facilities Support Services	42	136	34.1%	$21,060	$28,824	0.49	1.05	0.0%	0.1%
5613	Employment Services	2,905	2,288	-5.8%	$32,461	$41,666	0.72	0.42	1.7%	1.2%
5614	Business Support Services	594	955	12.6%	$39,757	$38,923	0.96	1.38	0.3%	0.5%
5616	Investigation and Security Services	276	647	23.7%	$33,220	$19,547	0.20	0.40	0.2%	0.3%
5617	Services to Buildings and Dwellings	2,549	2,930	3.5%	$31,488	$30,543	1.10	1.13	1.5%	1.5%

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

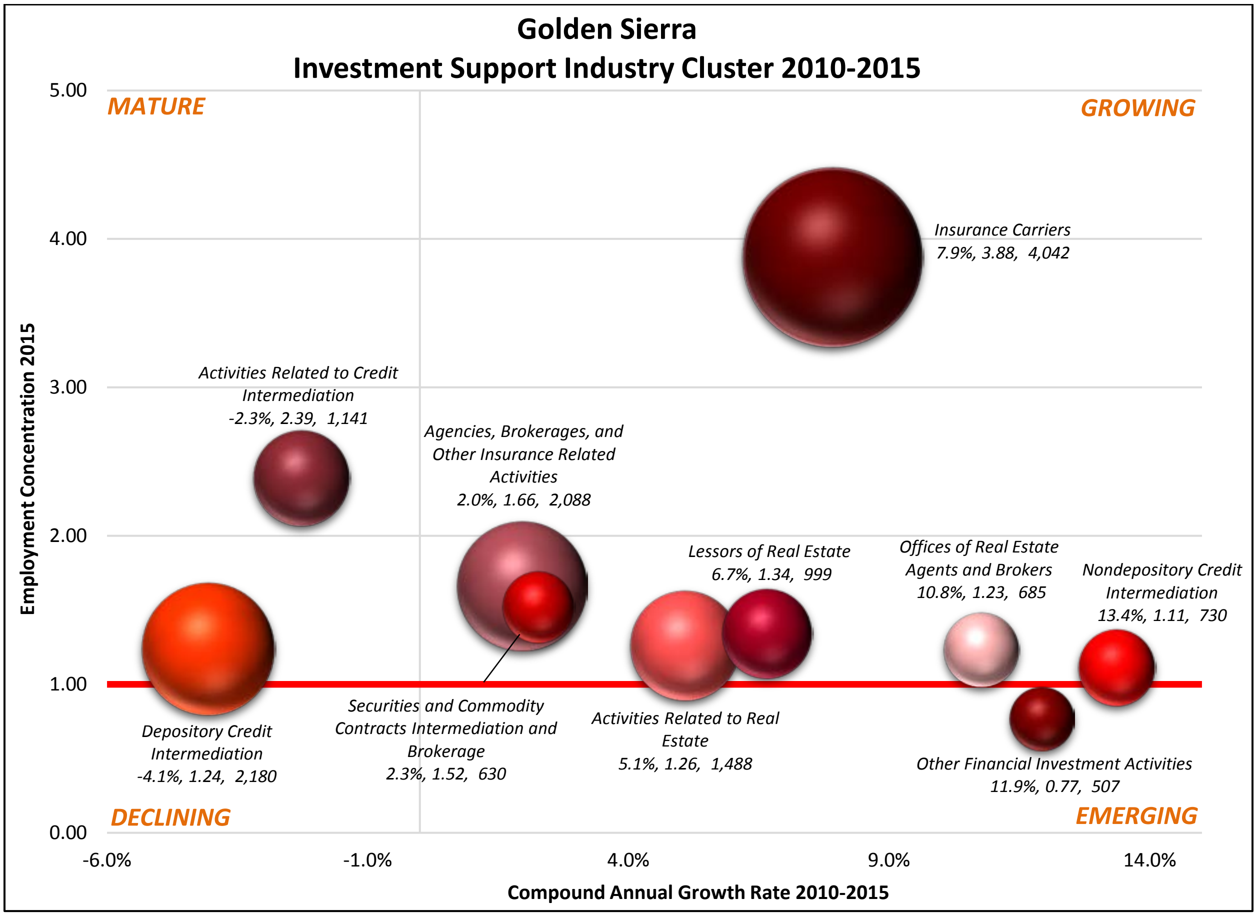
Business Management and Support Industry Cluster (continued) – Summary Table

NAICS Code	BUSINESS MANAGEMENT AND SUPPORT INDUSTRY CLUSTER (continued) Golden Sierra Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
5619	Other Support Services	108	240	22.1%	$35,804	$46,083	0.36	0.65	0.1%	0.1%
5621	Waste Collection	156	444	29.9%	$41,745	$42,067	0.84	1.86	0.1%	0.2%
5622	Waste Treatment and Disposal	185	204	2.5%	$59,891	$64,239	1.15	1.36	0.1%	0.1%
BUSINESS MANAGEMENT AND SUPPORT INDUSTRY CLUSTER SUMMARY		*14,257*	*17,155*	*4.7%*	*$49,258*	*$54,236*	*0.75*	*0.76*	*8.2%*	*8.8%*

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Investment Support Industry Cluster

The Investment Support industry cluster employed 14,490 workers, grew by 3.7 percent annually, and had an employment concentration of 1.66. The cluster posted 2015 annual average wages of $74,845, well above the region's total industry 2015 annual average wages of $48,745. Insurance Carriers was the largest industry with 4,042 employees, and had the largest employment concentration at 3.88. Nondepository Credit Intermediation experienced the largest growth rate at 13.4 percent annually, reported annual average wages of $103,444, and added 288 employees during the study period. Securities and Commodity Contracts Intermediation and Brokerage posted the highest annual average wages in 2015 at $141,031.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

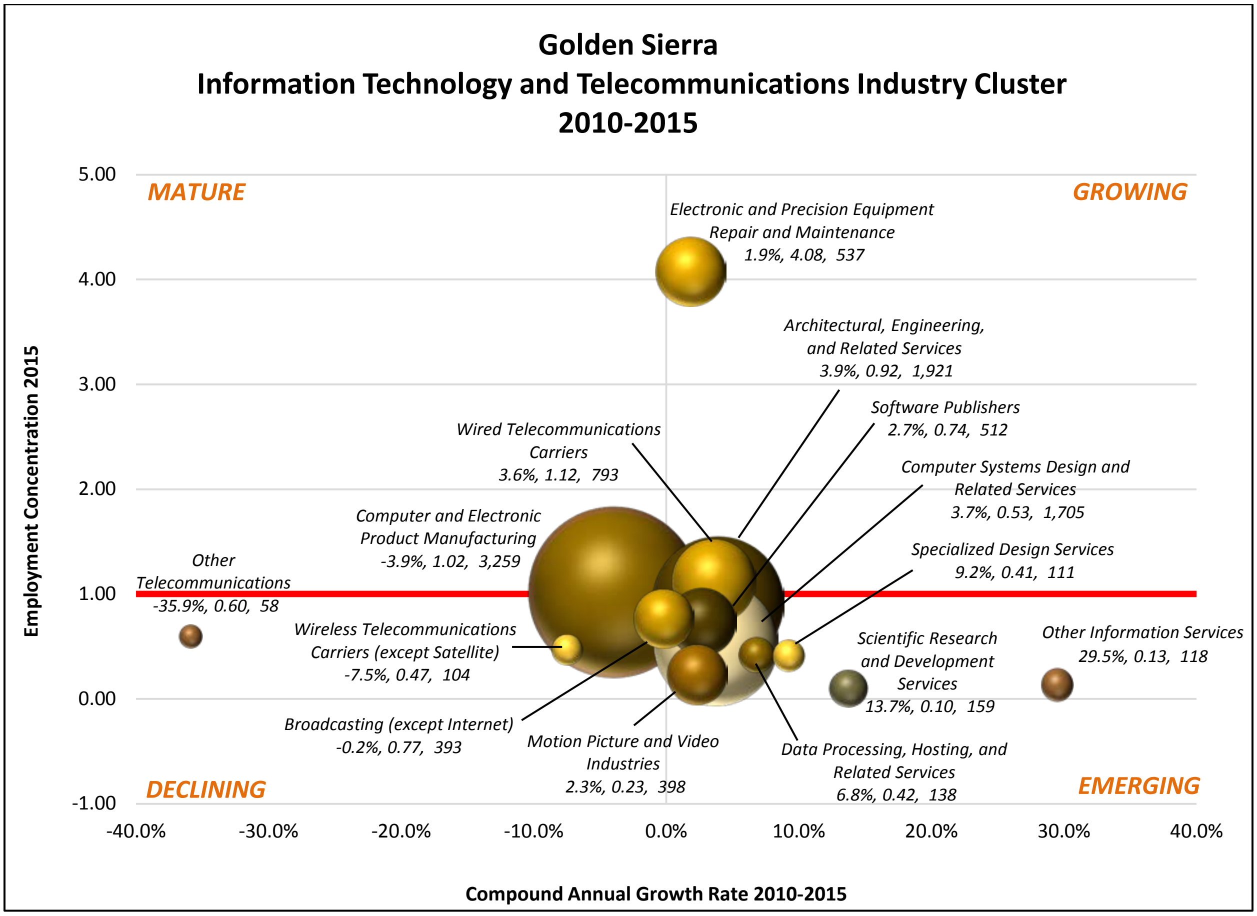
Investment Support Industry Cluster – Summary Table

INVESTMENT SUPPORT INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	**Industry Description**									
5221	**Depository Credit Intermediation**	2,573	2,180	-4.1%	$69,076	$67,185	1.35	1.24	1.5%	1.1%
5222	**Nondepository Credit Intermediation**	442	730	13.4%	$98,987	$103,444	0.73	1.11	0.3%	0.4%
5223	**Activities Related to Credit Intermediation**	1,251	1,141	-2.3%	$71,702	$99,294	3.24	2.39	0.7%	0.6%
5231	**Securities and Commodity Contracts Intermediation and Brokerage**	576	630	2.3%	$130,231	$141,031	1.42	1.52	0.3%	0.3%
5239	**Other Financial Investment Activities**	323	507	11.9%	$78,144	$78,651	0.60	0.77	0.2%	0.3%
5241	**Insurance Carriers**	2,981	4,042	7.9%	$78,107	$84,971	2.82	3.88	1.7%	2.1%
5242	**Agencies, Brokerages, and Other Insurance Related Activities**	1,932	2,088	2.0%	$62,091	$65,373	1.80	1.66	1.1%	1.1%
5311	**Lessors of Real Estate**	772	999	6.7%	$26,126	$39,482	1.10	1.34	0.4%	0.5%
5312	**Offices of Real Estate Agents and Brokers**	455	685	10.8%	$52,106	$60,002	0.94	1.23	0.3%	0.4%
5313	**Activities Related to Real Estate**	1,220	1,488	5.1%	$41,541	$40,328	1.16	1.26	0.7%	0.8%
INVESTMENT SUPPORT INDUSTRY CLUSTER SUMMARY		***12,525***	***14,490***	***3.7%***	***$68,566***	***$74,845***	***1.53***	***1.66***	***7.2%***	***7.5%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Information Technology and Telecommunications Industry Cluster

The Information Technology and Telecommunications industry cluster provided 10,206 jobs, grew by 0.1 percent annually, and had an employment concentration of 0.65. The cluster recorded annual average wages of $86,966. The largest industry was Computer and Electronic Product Manufacturing with 3,259 employees, and reported the highest wages in 2015 at $119,128. Other Information Services experienced the largest growth rate at 29.5 percent annually. Electronic and Precision Equipment Repair and Maintenance had the highest employment concentration at 4.08.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Information Technology and Telecommunications Industry Cluster – Summary Table

INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	Industry Description									
334	Computer and Electronic Product Manufacturing	3,829	3,259	-3.9%	$120,425	$119,128	1.17	1.02	2.2%	1.7%
5112	Software Publishers	460	512	2.7%	$88,393	$74,664	0.85	0.74	0.3%	0.3%
5121	Motion Picture and Video Industries	363	398	2.3%	$12,435	$16,434	0.22	0.23	0.2%	0.2%
515	Broadcasting (except internet)	396	393	-0.2%	$59,503	$66,830	0.76	0.77	0.2%	0.2%
5171	Wired Telecommunications Carriers	689	793	3.6%	$67,745	$77,014	1.64	1.12	0.4%	0.4%
5172	Wireless Telecommunications Carriers (except satellite)	142	104	-7.5%	$60,857	$63,139	0.56	0.47	0.1%	0.1%
5179	Other Telecommunications	343	58	-35.9%	$104,677	$61,370	0.80	0.60	0.2%	0.0%
5182	Data Processing, Hosting, and Related Services	106	138	6.8%	$58,593	$53,839	0.48	0.42	0.1%	0.1%
5191	Other Information Services	42	118	29.5%	$53,637	$58,695	0.09	0.13	0.0%	0.1%
5413	Architectural, Engineering, and Related Services	1,648	1,921	3.9%	$74,930	$74,864	0.87	0.92	1.0%	1.0%
5414	Specialized Design Services	78	111	9.2%	$45,205	$59,076	0.34	0.41	0.0%	0.1%
5415	Computer Systems Design and Related Services	1,472	1,705	3.7%	$94,908	$90,326	0.61	0.53	0.9%	0.9%

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

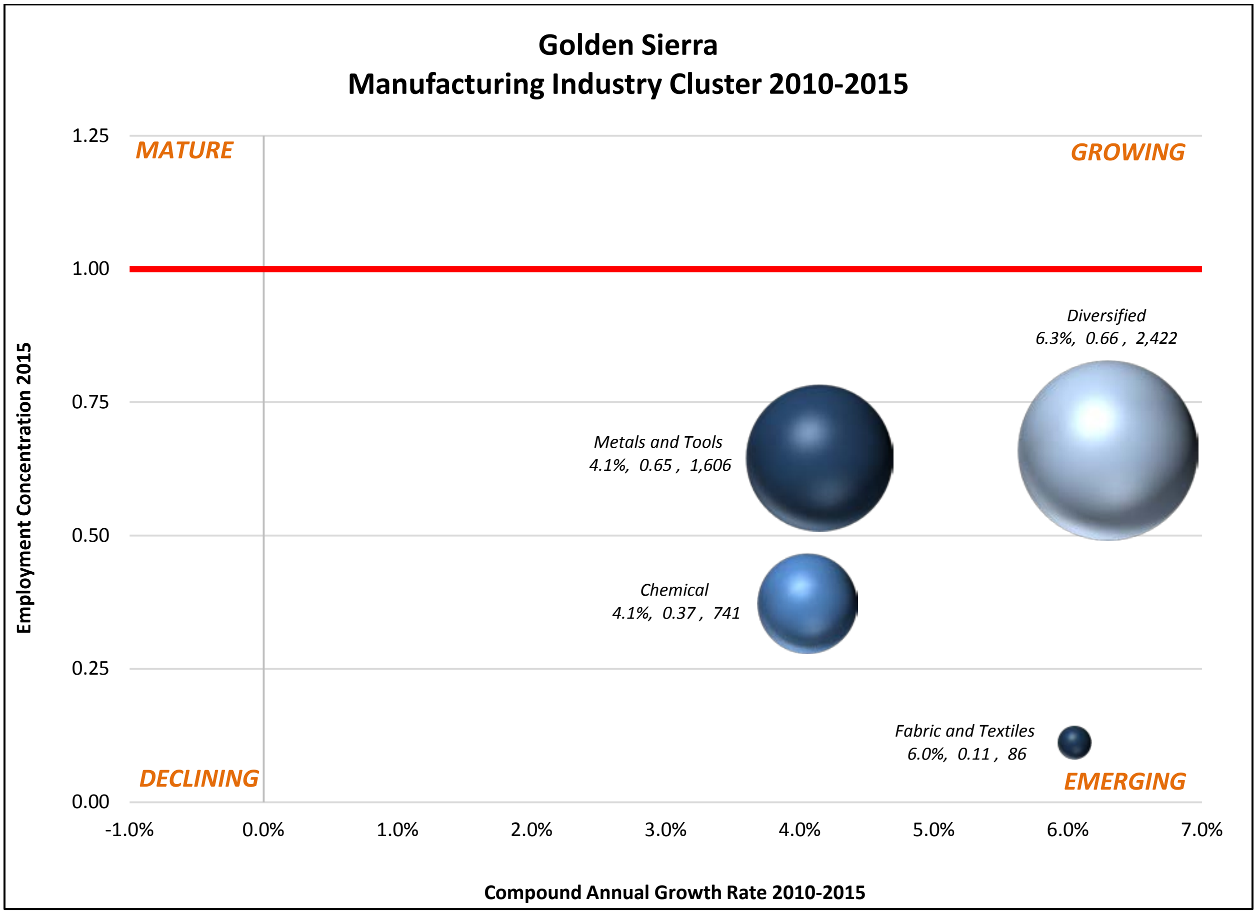
Information Technology and Telecommunications Industry Cluster (continued) – Summary Table

INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER (continued) Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS Code	**Industry Description**									
5417	**Scientific Research and Development Services**	95	159	13.7%	$101,275	$100,581	0.07	0.10	0.1%	0.1%
8112	**Electronic and Precision Equipment Repair and Maintenance**	499	537	1.9%	$47,752	$41,684	3.43	4.08	0.3%	0.3%
INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER SUMMARY		***10,162***	***10,206***	***0.1%***	***$91,487***	***$86,966***	***0.73***	***0.65***	***5.9%***	***5.3%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Manufacturing Industry Cluster

The Manufacturing industry cluster reported 5,036 employees, grew by 4.3% annually, and had an employment concentration of 0.53. The cluster posted 2015 annual average wages of $59,977, well above the region wages of $48,745. The manufacturing industry cluster was divided into four sub-clusters: Diversified, Metals and Tools, Chemical, and Fabric and Textiles. Professional and Commercial Equipment and Supplies Merchant Wholesalers, part of the Diversified sub-cluster, had the highest employment with 1,023 workers, and posted the highest wages in 2015 at $90,111. In the Fabric and Textiles sub-cluster, Apparel Accessories, Other Apparel, and Other Leather and Allied Product Manufacturing showed the most growth during the study period at 25.0 percent annually. Metalworking Machinery Manufacturing, part of the Metals and Tools sub-cluster, reported the highest employment concentration at 1.41.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Manufacturing Industry Cluster – Summary Table

NAICS Code	MANUFACTURING INDUSTRY CLUSTER Golden Sierra Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
	Diversified									
335	Electrical Equipment, Appliance, and Component Manufacturing	178	297	13.7%	$66,307	$53,708	0.30	0.47	0.1%	0.2%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	177	165	-1.7%	$38,272	$34,711	0.74	0.62	0.1%	0.1%
3372	Office Furniture (including Fixtures) Manufacturing	59	32	-14.2%	$46,310	$61,507	0.67	0.33	0.0%	0.0%
3399	Other Miscellaneous Manufacturing	232	259	2.8%	$40,829	$52,217	0.64	0.69	0.1%	0.1%
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	540	1,023	17.3%	$77,166	$90,111	0.60	1.04	0.3%	0.5%
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	262	320	5.1%	$72,107	$57,109	0.48	0.51	0.2%	0.2%
4239	Miscellaneous Durable Good Merchant Wholesalers	370	234	-10.8%	$41,521	$33,762	0.76	0.44	0.2%	0.1%
4241	Paper and Paper Product Merchant Wholesalers	80	92	3.6%	$92,088	$85,147	0.49	0.56	0.0%	0.0%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	295	181	-11.5%	$72,572	$56,408	0.53	0.30	0.2%	0.1%
	Diversified Summary	***1,898***	***2,422***	***6.3%***	***$60,102***	***$67,450***	***0.56***	***0.66***	***1.1%***	***1.2%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Manufacturing Industry Cluster (continued) – Summary Table

NAICS CODE	Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
MANUFACTURING INDUSTRY CLUSTER (continued) Golden Sierra										
Metals and Tools										
3322	Cutlery and Handtool Manufacturing	16	30	17.0%	$44,546	$37,543	0.57	1.10	0.0%	0.0%
3323	Architectural and Structural Metals Manufacturing	145	147	0.3%	$44,847	$45,668	0.46	0.40	0.3%	0.1%
3324 3325 3326	Boiler, Tank, Shipping Container, Hardware, Spring, and Wire Manufacturing	65	45	-8.8%	$42,228	$42,481	0.53	0.36	0.0%	0.0%
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	384	432	3.0%	$53,178	$52,090	0.83	0.81	0.2%	0.2%
3328	Coating, Engraving, Heat Treating, and Allied Activities	58	67	3.7%	$34,867	$37,298	0.33	0.34	0.0%	0.0%
3329	Other Fabricated Metal Product Manufacturing	20	24	4.7%	$40,336	$48,664	0.11	0.11	0.0%	0.0%
333	Machinery Manufacturing except Metalworking Machinery Manufacturing	386	557	9.6%	$54,709	$52,258	0.57	0.76	0.2%	0.3%
3335	Metalworking Machinery Manufacturing	230	215	-1.7%	$53,255	$53,563	1.73	1.41	0.1%	0.1%
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	61	89	9.9%	$56,298	$36,131	0.49	0.66	0.0%	0.0%
Metals and Tools Summary		***1,365***	***1,606***	***4.1%***	***$51,290***	***$49,664***	***0.61***	***0.65***	***0.8%***	***0.8%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

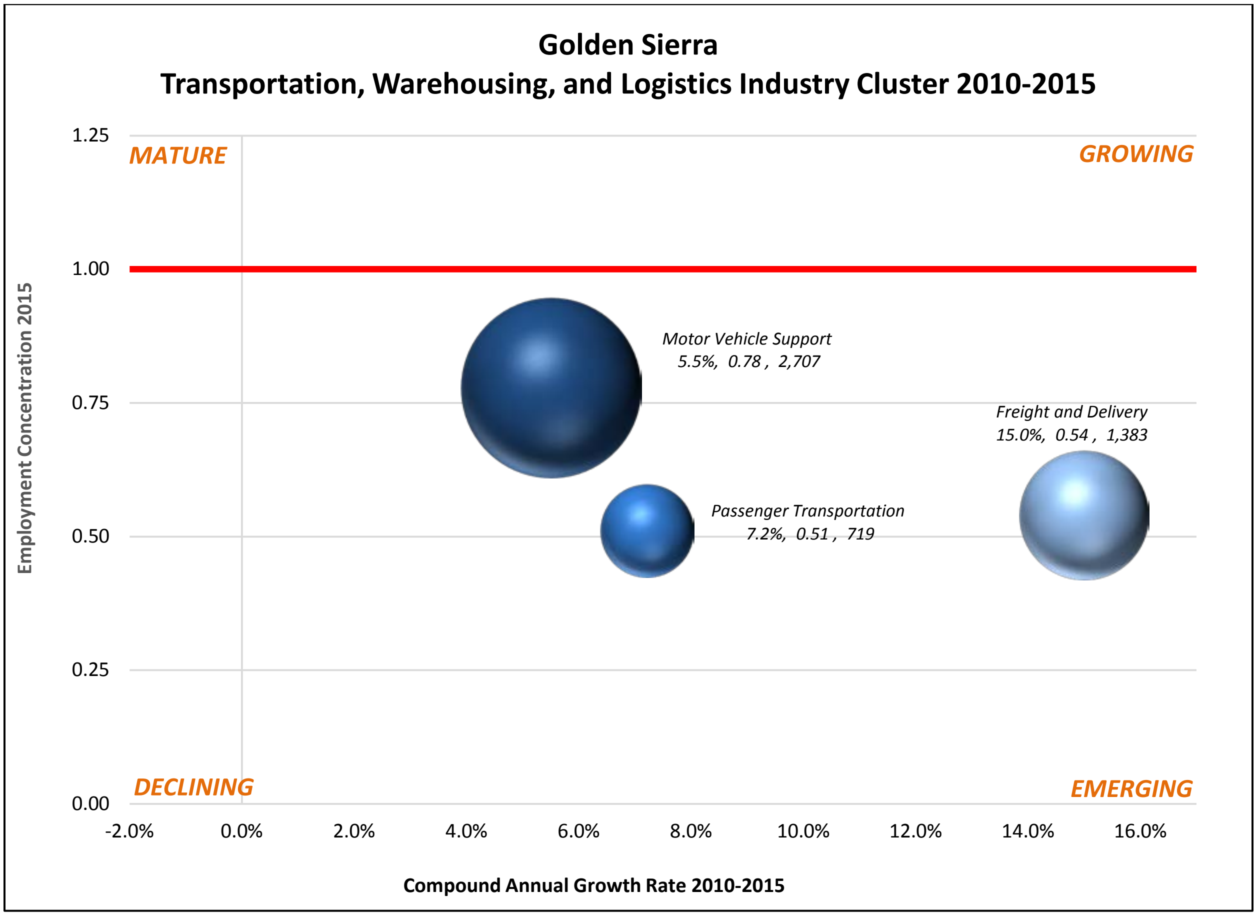
Manufacturing Industry Cluster (continued) – Summary Table

NAICS CODE	MANUFACTURING INDUSTRY CLUSTER (CONTINUED) Golden Sierra — Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
Chemical										
3231	Printing and Related Support Activities	299	413	8.4%	$42,416	$59,968	0.56	0.80	0.2%	0.2%
325	Chemical Manufacturing	193	168	-3.4%	$73,826	$77,792	0.22	0.18	0.1%	0.1%
326	Plastics and Rubber Products Manufacturing	140	160	0.27	$54,337	$48,985	0.27	0.30	0.1%	0.1%
Chemical Summary		***632***	***741***	***4.1%***	***$54,649***	***$61,638***	***0.33***	***0.37***	***0.4%***	***0.4%***
Fabric and Textiles										
3141	Textile Furnishings Mills	15	15	0.0%	$82,580	$62,504	0.29	0.35	0.0%	0.0%
3149	Other Textile Product Mills	28	38	7.9%	$38,153	$34,923	0.47	0.61	0.0%	0.0%
3152	Cut and Sew Apparel Manufacturing	16	11	-8.9%	$37,073	22,064	0.02	0.02	0.0%	0.0%
3159 3169	Apparel Accessories, Other Apparel, and Other Leather and Allied Product Manufacturing	9	22	25.0%	$22,269	$24,062	0.16	0.43	0.0%	0.0%
Fabric and Textiles Summary		***68***	***86***	***6.0%***	***$45,597***	***$35,311***	***0.08***	***0.11***	***0.0%***	***0.0%***
MANUFACTURING INDUSTRY CLUSTER SUMMARY		***3,963***	***4,855***	***5.2%***	***$55,948***	***$60,110***	***0.47***	***0.54***	***2.3%***	***2.5%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Transportation, and Logistics Industry Cluster

The Transportation and Logistics industry cluster employed 4,812 workers in 2015, grew by 8.1 percent annually, and reported an employment concentration of 0.64. In 2015, the annual average wages in this cluster was $41,945, below the region's average wage of $48,745. This industry cluster was comprised of three sub-clusters: Motor Vehicle Support, Passenger Transportation, and Freight and Delivery. Freight Transportation Arrangement, a component of the Freight and Delivery sub-cluster, recorded the highest annual average wage at $146,496, three times more than the region's average wage, and grew at a rate of 6.9 percent annually. Local Messengers and Local Delivery reported the highest growth rate at 66.2 percent annually, and the highest employment concentration at 2.09.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Transportation and Logistics Industry Cluster– Summary Table

TRANSPORTATION, WAREHOUSING, AND LOGISTICS INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS CODE	Industry Description									
Motor Vehicle Support										
336	Transportation Equipment Manufacturing, except Motor Vehicle Parts Manufacturing	41	87	20.7%	$50,218	$55,140	0.04	0.09	0.0%	0.0%
3363	Motor Vehicle Parts Manufacturing	115	132	3.5%	$40,105	$39,189	0.79	0.82	0.1%	0.1%
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	89	121	8.0%	$43,424	$54,944	0.22	0.27	0.1%	0.1%
4247	Petroleum and Petroleum Products Merchant Wholesalers	107	139	6.8%	$67,540	$58,385	1.24	1.55	0.1%	0.1%
4884	Support Activities for Road Transportation	201	212	1.3%	$36,030	$31,932	1.07	1.23	0.1%	0.1%
5321	Automotive Equipment Rental and Leasing	322	255	-5.7%	$57,298	$77,421	1.49	0.99	0.2%	0.1%
8111	Automotive Repair and Maintenance	1,309	1,761	7.7%	$37,810	$38,022	1.09	1.30	0.8%	0.9%
Motor Vehicle Support Summary		***2,184***	***2,707***	***5.5%***	***$42,558***	***$43,666***	***0.69***	***0.78***	***1.3%***	***1.4%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Transportation, Warehousing, and Logistics Industry Cluster (continued) – Summary Table

TRANSPORTATION, WAREHOUSING, AND LOGISTICS INDUSTRY CLUSTER Golden Sierra		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
NAICS CODE	**Industry Description**									
	Freight and Delivery									
4841	**General Freight Trucking**	129	276	20.9%	$50,091	$36,144	0.16	0.29	0.1%	0.1%
4842	**Specialized Freight Trucking**	150	298	18.7%	$33,600	$36,116	0.35	0.60	0.1%	0.2%
4885	**Freight Transportation Arrangement**	52	68	6.9%	$160,580	$146,496	0.18	0.20	0.0%	0.0%
4921	**Couriers and Express Delivery Services**	430	512	4.5%	$51,879	$48,524	0.71	0.74	0.2%	0.3%
4922	**Local Messengers and Local Delivery**	30	229	66.2%	$38,353	$19,737	0.34	2.09	0.0%	0.1%
Freight and Delivery Summary		***791***	***1,383***	***15.0%***	***$54,754***	***$43,430***	***0.36***	***0.54***	***0.5%***	***0.7%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

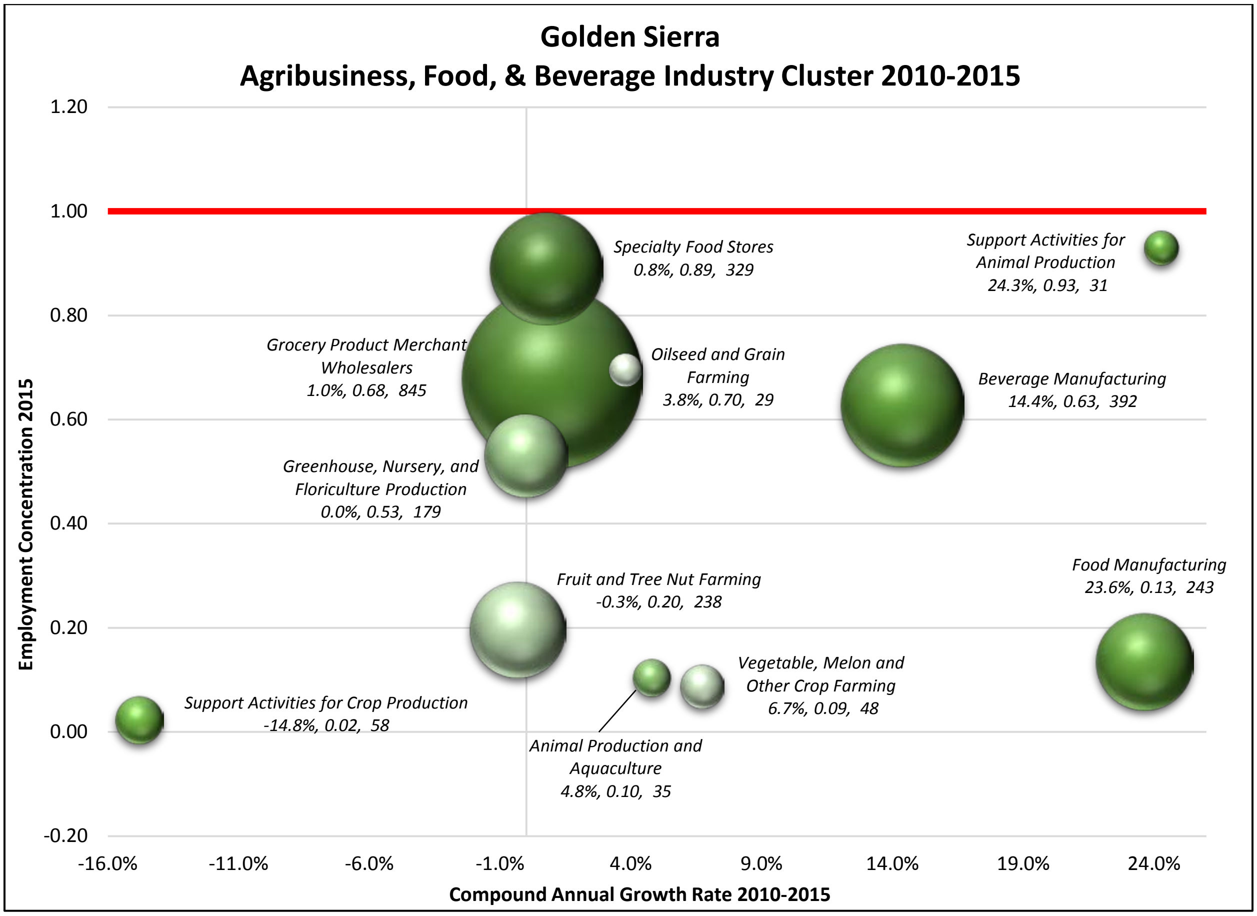
Transportation, Warehousing, and Logistics Industry Cluster (continued) – Summary Table

NAICS CODE	Industry Description (TRANSPORTATION, WAREHOUSING, AND LOGISTICS INDUSTRY CLUSTER – Golden Sierra)	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
Passenger Transportation										
4812 4832 4851 4854 4855	**Nonscheduled Air Transportation, Inland Water Transportation, Urban Transit Systems, School and Employee Bus Transportation, and Charter Bus Industry**	91	84	-2.0%	$37,262	$34,506	0.38	0.31	0.1%	0.0%
4853	**Taxi and Limousine Service**	26	10	-21.2%	$20,699	$22,847	0.38	0.11	0.0%	0.0%
4859	**Other Transit and Ground Passenger Transportation**	79	33	-19.6%	$27,940	$21,154	0.51	0.20	0.0%	0.0%
487	**Scenic and Sightseeing Transportation**	28	58	20.0%	$24,281	$24,754	0.65	1.10	0.0%	0.0%
4881	**Support Activities for Air Transportation**	119	136	3.4%	$52,886	$53,273	0.57	0.50	0.1%	0.1%
4882 4883 4889	**Other Transportation Services, Including Rail and Water**	201	398	18.6%	$26,793	$27,520	0.44	0.73	0.1%	0.2%
Passenger Transportation Summary		***544***	***719***	***7.2%***	***$33,998***	***$32,627***	***0.46***	***0.51***	***0.3%***	***0.4%***
TRANSPORTATION AND LOGISTICS INDUSTRY CLUSTER SUMMARY		***3,522***	***4,812***	***8.1%***	***$43,943***	***$41,945***	***0.54***	***0.64***	***2.0%***	***2.5%***

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Agribusiness, Food and Beverage Production Industry Cluster

Agribusiness, Food and Beverage Production Industry Cluster employed 2,427, grew by 3.7 percent annually, reported employment concentration at 0.27, and had an annual average wage of $33,087. Farm Product Raw Material, Grocery, and Related Product Merchant Wholesalers was the largest industry in 2015 with 876 employees, had an employment concentration of 0.69, and reported the highest annual wages of $51,544, higher than the region's average wage of $48,745. Support Activities for Animal Production posted the highest concentration at 0.93, and experienced the largest growth rate at 24.3 percent annually. Food Manufacturing experienced the second largest growth rate at 23.6 percent annually, adding 139 employees.



Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry group from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. The vertical position represents the employment concentration relative to California in 2015 (the higher the bubble, the greater concentration). A concentration greater than 1.0 indicates a higher concentration of jobs in the industry group than found statewide, and industry groups with a LQ of 1.25 or higher are considered heavily concentrated. A high concentration indicates a competitive advantage and an area of regional specialization compared to the state. The size of the bubble indicates the employment (number of jobs) in that industry group in 2015.

Agribusiness, Food and Beverage Production Industry Cluster – Summary Table

NAICS Code	Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2010-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER Golden Sierra										
1111	Oilseed and Grain Farming	25	29	3.8%	$27,400	$32,568	0.70	0.70	0.0%	0.0%
1112 1119	Vegetable, Melon, and Other Crop Farming	37	48	6.7%	$23,042	$19,752	0.07	0.09	0.0%	0.0%
1113	Fruit and Tree Nut Farming	241	238	-0.3%	$18,194	$20,353	0.21	0.20	0.1%	0.1%
1114	Greenhouse, Nursery, and Floriculture Production	179	179	0.0%	$24,695	$25,306	0.57	0.53	0.1%	0.1%
112	Animal Production and Aquaculture	29	35	4.8%	$28,308	$26,949	0.09	0.10	0.0%	0.0%
1151	Support Activities for Crop Production	110	58	-14.8%	$34,376	$37,716	0.05	0.02	0.1%	0.0%
1152	Support Activities for Animal Production	13	31	24.3%	$16,506	$19,899	0.38	0.93	0.0%	0.0%
311	Food Manufacturing	104	243	23.6%	$27,878	$32,541	0.06	0.13	0.1%	0.1%
3121	Beverage Manufacturing	229	392	14.4%	$24,973	$24,178	0.46	0.63	0.1%	0.2%
4244	Grocery Product Merchant Wholesalers	813	845	1.0%	$50,936	$49,214	0.72	0.68	0.5%	0.4%
4452	Specialty Food Stores	319	329	0.8%	$18,254	$19,203	0.86	0.89	0.2%	0.2%
AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER SUMMARY		*2,099*	*2,427*	*3.7%*	*$33,381*	*$33,087*	*0.25*	*0.27*	*1.2%*	*1.2%*

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages (QCEW) Program, 2010 and 2015 Annual Average.

Data Sources

California Employment Development Department (EDD), Labor Market Information Division (LMID)

Quarterly Census of Employment and Wages (QCEW) Program, 2010 (2nd Quarter 2010 through 1st Quarter 2011) – 2015 (2nd Quarter 2014 through 1st Quarter 2015) (http://www.labormarketinfo.edd.ca.gov/qcew/cew-select.asp)

The Quarterly Census of Employment and Wages (QCEW) Program, also known as the ES-202 Program, is a Federal-State cooperative program operated by the Employment Development Department's (EDD) Labor Market Information Division (LMID). The EDD staff compiles the data from reports filed by employers each quarter. The QCEW Program produces a comprehensive tabulation of employment and wage information for workers covered by California Unemployment Insurance (UI) laws and Federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program. More information about the program can be found at the Labor Market Information Division website.

U.S. Department of Labor (DOL), Bureau of Labor Statistics (BLS)

Employment Concentration, 2015
(http://data.bls.gov/location_quotient/ControllerServlet)

The Employment Concentration, or Location Quotient (LQ), is calculated using data from the Quarterly Census of Employment and Wages (QCEW) Program. The quotient compares regional employment concentration to the national or statewide employment concentration. The resultant measure is a ratio called "location quotient" that indicates the level of specialization of the industry within the selected geographic area. The LQ is used to indicate the extent to which the local economy is importing, self-sufficient, or exporting goods and services.

State of California

Labor and Workforce Development Agency

Employment Development Department

The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Requests for services, aids, and/or alternate forms need to be made by calling 916-262-2166 (voice). TTY users, please call the California Relay Service at 711.