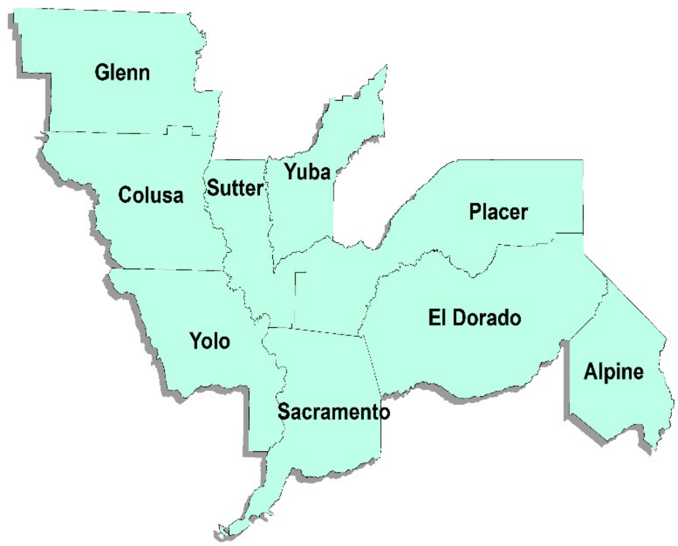
Capitol Region
Industry Clusters of Opportunity 2010-2015

Overview

This report was prepared by the Labor Market Information Division (LMID) of the California Employment Development Department to provide the Golden Sierra, North Central Counties Consortium, Sacramento Employment and Training Agency, and Yolo Workforce Development Boards a resource for workforce development and strategic 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 grouping of companies with related business activities. These businesses are economically interdependent and may have common supply chains, labor needs, technologies, and economic markets. Industry clusters identified in the Capitol Region – including Alpine, Colusa, El Dorado, Glenn, Placer, Sacramento, Sutter, Yolo and Yuba counties – are those that demonstrated the greatest opportunity for new jobs, rising wages, business expansion, and career development possibilities. The LMID aggregated ten regional industry clusters for the Capitol Region, which were comprised of 195 industries across the nine county region. These industry clusters include (in order of size by total number of jobs):

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

Capitol Region Industry Cluster Overview (continued)

During the study period, 2010 through 2015, the ten 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 57.3 percent of the total regional jobs in 2015, and 57.0 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, accounting for 11.6 percent of total regional jobs, followed by Arts, Entertainment, and Recreation with 10.3 percent. The highest annual wages were found in Information Technology and Telecommunications, with an average wage of $107,020. The concentration of employment in the Investment Support, Building and Systems Construction, and Healthcare and Social Assistance clusters were slightly higher in the region compared to the state in 2015.

Capitol Region Industry Cluster Descriptions

The **Healthcare and Social Assistance** industry cluster includes private health care providers and other private health related services, employed 112,802 people in 2015, and comprised 11.6 percent of the region's employment. Businesses in this industry cluster primarily provide health care services and health products for individuals. Firms include:

- Health and Personal Care Stores
- Pharmaceutical, and Medical Equipment and Supplies Manufacturing
- Home Health and Other Ambulatory Health Care Services
- General Medical and Surgical Hospitals
- Nursing Care Facilities
- Social Advocacy Organizations

The **Arts, Entertainment, and Recreation** industry cluster includes firms primarily involved in the leisure, hospitality, and tourism industries. This cluster employed 99,964 people in 2015, accounted for 10.3 percent of the region's employment. Firms include:

- Travel Agents
- Charter Buses
- Spectator Sports
- Restaurants and Bars
- Hotels and Motels

The **Business Management and Support** industry cluster provided 92,024 jobs among businesses involved in accounting, legal services, consulting services, and waste management. These firms made up 9.5 percent of total regional employment in 2015. Firms include:

- Administrative and Support Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Legal Services
- Management, Scientific, and Technical Consulting Services
- Advertising, Public Relations, and Related Services
- Management of Companies and Enterprises
- Waste Collection

The **Building and Systems Construction** industry cluster includes firms focused on the physical infrastructure of communities. The industries serve the area's need for housing and commercial structures, as well as roadways. The cluster employed 73,306 workers in 2015, and comprised 7.6 percent of total regional employment. Firms include:

- Residential Building Construction
- Nonresidential Building Construction
- Highway, Street, and Bridge Construction
- Cement and Concrete Product Manufacturing
- Building Material and Supplies Dealers

Capitol Region Industry Cluster Descriptions (continued)

The **Investment Support** industry cluster includes firms primarily engaged in finance, insurance, and real estate. This cluster's employment stood at 47,105 in 2015, comprising 4.9 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, peripheral, and other electronic component manufacturing, telecommunications, as well as architectural, engineering, and software publishers. The cluster employed 40,261 workers, and provided 4.2 percent of total regional jobs in 2015. Firms include:

- Computer and Peripheral Equipment Manufacturing
- Semiconductor and Other Electronic Component Manufacturing
- Wired Telecommunications Carriers
- Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
- Architectural, Engineering, and Related Services
- Computer Systems Design and Related Services
- Scientific Research and Development Services

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 for crop and animal production. This cluster employed 36,441 people in 2015, or 3.8 percent of the region's workforce. Firms include:

- Oilseed and Grain Farming
- Vegetable and Melon Farming
- Fruit and Tree Nut Farming
- Other Crop Farming
- Animal Food Manufacturing
- Other Animal Production
- Sugar and Confectionery Product Manufacturing
- Support Activities for Crop Production
- Support Activities for Animal Production

Capitol Region Industry Cluster Descriptions (continued)

The **Transportation, Warehousing, and Logistics** industry cluster contains businesses involved in the transportation and supporting industries, such as long distance and specialized freight trucking, courier services, and warehousing and storage. The industry cluster employed 26,322 workers, and provided 2.7 percent of total regional jobs in 2015. Firms include:

- Warehousing and Storage
- Automotive Equipment Rental, Repair and Maintenance
- Freight Transportation Arrangement
- Postal Service, Couriers, and Messengers

The **Manufacturing** industry cluster includes firms primarily involved in the manufacturing of durable goods such as textile mills, machine shops, and plastics and rubber products manufacturers. This group provided 17,701 jobs, accounting for 1.8 percent of the region's employment in 2015. Firms include:

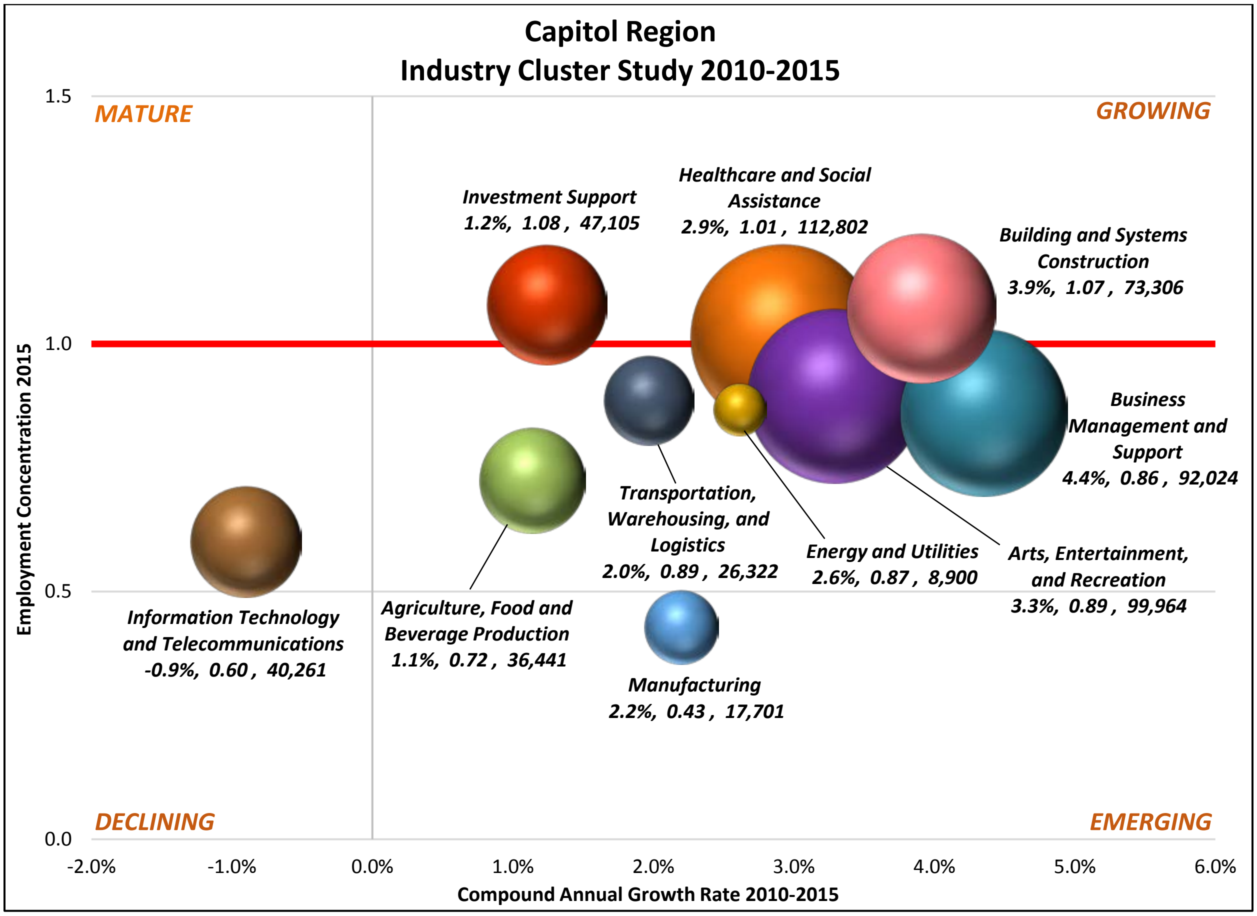
- Cut and Sew Apparel Manufacturing
- Cutlery and Handtool Manufacturing
- Spring and Wire Product Manufacturing
- Metal and Mineral Merchant Wholesalers

The **Energy and Utilities** industry cluster contains businesses involved in the extraction, dissemination, and manufacturing of natural resources, as well as their support activities. This cluster supplied 8,900 jobs, and accounted for 0.9 percent of the region's employment in 2015. Firms include:

- Oil and Gas Extraction/Distribution
- Quarrying
- Water, Sewage and Other Systems
- Utility System Construction
- Electrical Equipment Manufacturing
- Pipeline Transportation
- Petroleum Wholesalers

Capitol Region Industry Clusters 2010-2015

The chart below is a visual representation of the Capitol Region 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 is the largest cluster and is comprised of the following industry sub-clusters: Direct Health Services, Health Support, and Social Assistance and Advocacy. The industry cluster employed 112,802 workers, experienced strong employment growth of 2.9 percent per year, and had an employment concentration of 1.01. Overall, this cluster was led by significant growth in Other Residential Care Facilities (up 30.7 percent), which was part of the Direct Health Services sub-cluster. In addition, this industry saw the highest employment concentration at 3.87. Hospitals, also in the Direct Health Services sub-cluster, recorded the largest employment at 25,160 jobs in 2015.

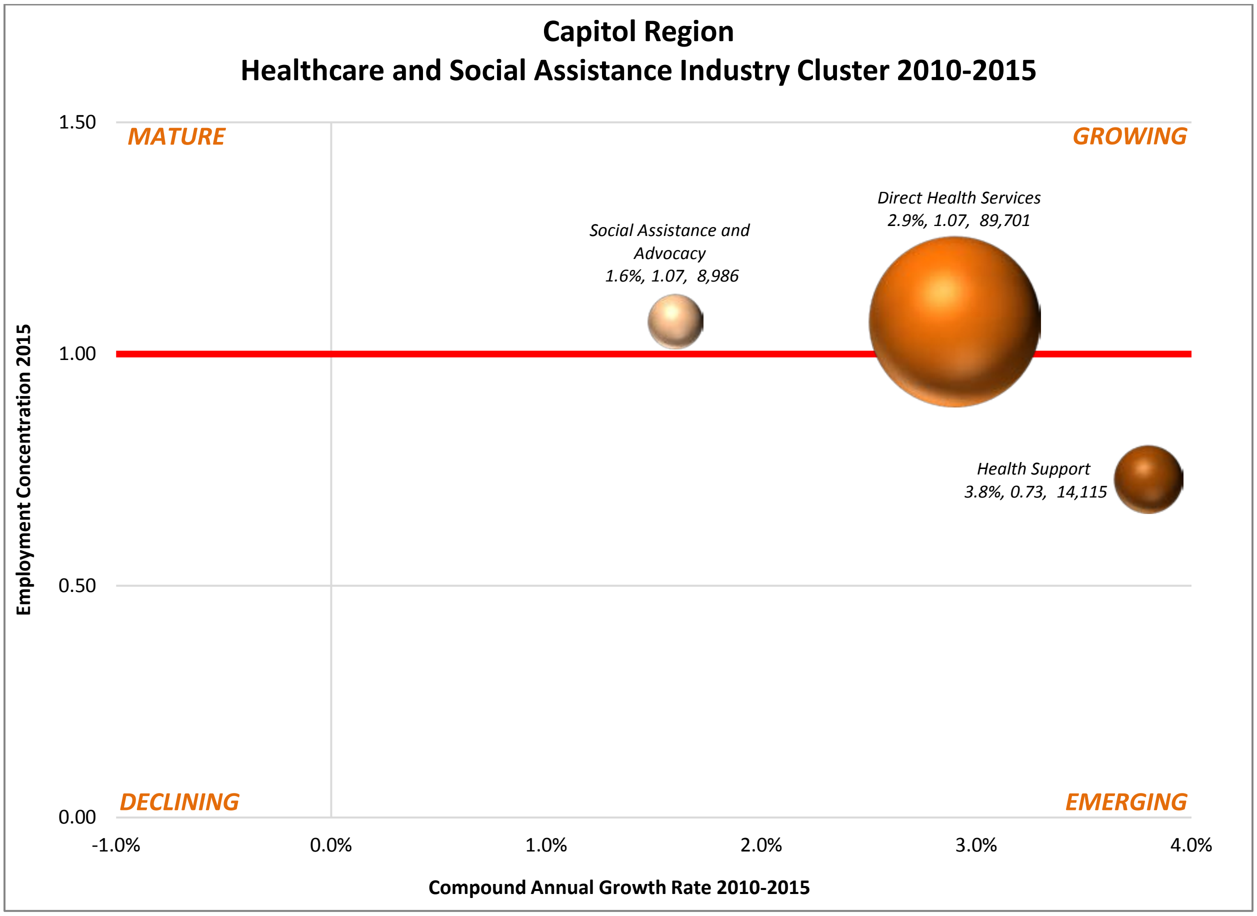


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Chart interpretation: A bubble's position on the horizontal axis represents the level of employment growth experienced by that industry cluster from 2010 to 2015 as measured by the compound annual growth rate. Bubbles positioned on the right of zero indicate job growth and left of zero denotes job loss. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

Healthcare and Social Assistance Industry Cluster – Summary Table

HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER Capitol Region		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									
Direct Health Services										
6211	Offices of Physicians	11,243	12,605	2.9%	$97,093	$98,939	0.72	0.75	1.2%	1.3%
6212	Offices of Dentists	7,457	8,154	2.3%	$49,864	$48,180	1.07	1.11	0.8%	0.8%
6213	Offices of Other Health Practitioners	3,642	4,111	3.1%	$33,442	$32,522	0.91	0.91	0.4%	0.4%
6214	Outpatient Care Centers	12,349	13,410	2.1%	$100,001	$105,463	2.03	1.90	1.4%	1.4%
6215	Medical and Diagnostic Laboratories	1,143	1,143	0.0%	$54,434	$54,236	0.60	0.58	0.1%	0.1%
6216	Home Health Care Services	3,002	3,752	5.7%	$39,087	$40,731	0.76	0.79	0.3%	0.4%
6219	Other Ambulatory Health Care Services	1,418	1,467	0.9%	$51,996	$52,207	0.94	0.92	0.2%	0.2%
622	Hospitals	24,039	25,160	1.1%	$76,660	$83,971	1.04	1.11	2.7%	2.6%
6231	Nursing Care Facilities	7,794	8,006	0.7%	$34,509	$34,087	1.04	1.00	0.9%	0.8%
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	2,149	1,890	-3.2%	$29,782	$27,351	0.78	0.68	0.2%	0.2%
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	4,544	6,659	10.0%	$23,755	$23,581	1.05	1.28	0.5%	0.7%
6239	Other Residential Care Facilities	1,147	3,344	30.7%	$30,905	$4,781	1.23	3.87	0.1%	0.3%
Direct Health Services Summary		***79,926***	***89,701***	***2.9%***	***$67,470***	***$67,889***	***1.02***	***1.07***	***8.9%***	***9.3%***

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

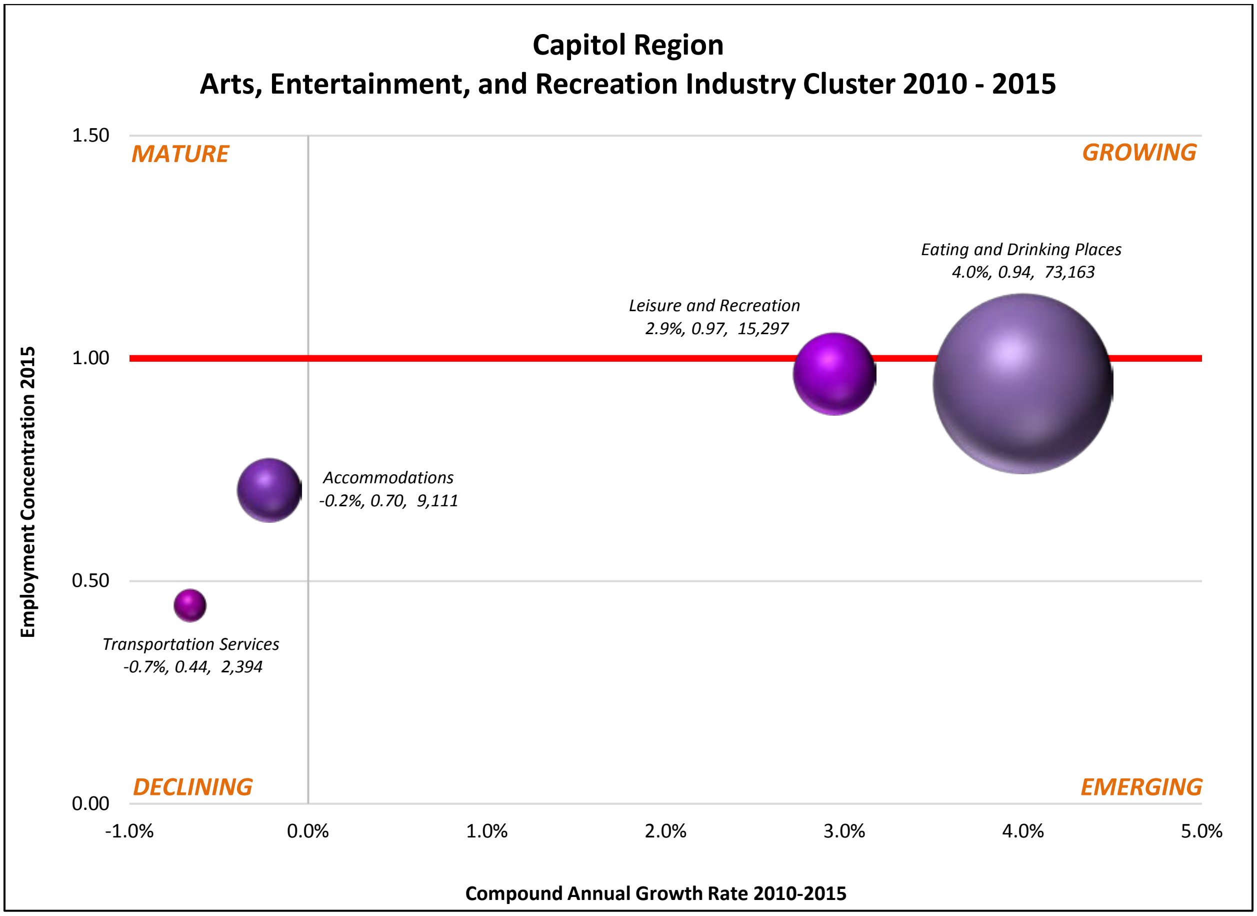
Healthcare and Social Assistance Industry Cluster (continued) – Summary Table

NAICS Code	Industry Description (HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER (continued) Capitol Region)	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
	Health Support									
3254	Pharmaceutical and Medicine Manufacturing	635	690	2.1%	$86,563	$93,507	0.24	0.24	0.1%	0.1%
3391	Medical Equipment and Supplies Manufacturing	788	2,025	26.6%	$51,049	$72,317	0.25	0.62	0.1%	0.2%
4242	Drugs and Druggists' Sundries Merchant	532	472	-3.0%	$57,904	$60,478	0.39	0.31	0.1%	0.0%
4461	Health and Personal Care Stores	5,760	5,760	0.0%	$40,647	$37,885	0.90	0.87	0.6%	0.6%
8121	Personal Care Services	3,932	4,595	4.0%	$17,187	$17,528	1.06	1.05	0.4%	0.5%
8122	Death Care Services	515	573	2.7%	$40,460	$39,429	0.86	0.91	0.1%	0.1%
	Health Support Summary	***12,162***	***14,115***	***3.8%***	***$36,881***	***$39,735***	***0.68***	***0.73***	***1.3%***	***1.5%***
	Social Assistance and Advocacy									
6242	Community Food and Housing, and Emergency and Other Relief Services	1,022	1,281	5.8%	$32,071	$31,922	1.07	1.21	0.1%	0.1%
6243	Vocational Rehabilitation Services	2,273	2,638	3.8%	$27,097	$27,366	1.08	1.27	0.3%	0.3%
6244	Child Day Care Services	3,856	3,693	-1.1%	$22,671	$22,079	1.03	0.96	0.4%	0.4%
8133	Society Advocacy Organizations	1,280	1,374	1.8%	$46,649	$51,193	0.99	0.96	0.1%	0.1%
	Social Assistance and Advocacy Summary	***8,430***	***8,986***	***1.6%***	***$28,644***	***$29,486***	***1.04***	***1.07***	***0.9%***	***0.9%***
	HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY CLUSTER SUMMARY	***100,518***	***112,802***	***2.9%***	***$60,512***	***$61,307***	***0.96***	***1.01***	***11.1%***	***11.6%***

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 employed 99,964, grew by 3.3 percent annually, and reported a concentration of 0.89. The average annual wages of $19,213 were below the regional average annual wage of $52,774. This industry cluster was divided into four sub-clusters: Eating and Drinking Places, Leisure and Recreation, Accommodations, and Transportation Services. Other Amusement and Recreation Industries held the largest concentration of all industries in this cluster at 1.44, while Performing Arts, Spectator Sports, and Related Industries held the highest average annual wages at $57,012. Amusement Parks and Arcades reported the highest growth rate in this cluster at 15.5 percent annually. All three of these industries are a part of the Leisure and Recreation sub-cluster.



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Arts, Entertainment, and Recreation Industry Cluster – Summary Table

NAICS Code	ARTS, ENTERTAINMENT, AND RECREATION INDUSTRY CLUSTER Capitol Region 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
	Eating and Drinking Places									
7223	Special Food Services	1,506	2,168	9.5%	$22,190	$21,678	0.52	0.59	0.2%	0.2%
7224	Drinking Places (Alcoholic Beverages)	1,323	1,588	4.7%	$13,019	$14,072	0.86	0.91	0.1%	0.2%
7225	Restaurants and Other Eating Places	59,716	69,407	3.8%	$16,223	$16,502	0.96	0.96	6.6%	7.2%
	Eating and Drinking Places Summary	***62,545***	***73,163***	***4.0%***	***$16,299***	***$16,603***	***0.94***	***0.94***	***6.9%***	***7.5%***
	Leisure and Recreation									
711	Performing Arts, Spectator Sports, and Related Industries	1,892	2,108	2.7%	$56,371	$57,012	0.68	0.65	0.2%	0.2%
7121	Museums, Historical Sites, and Similar Institutions	318	370	3.9%	$33,276	$29,646	0.34	0.35	0.0%	0.0%
7131	Amusement Parks and Arcades	165	293	15.5%	$14,246	$13,448	0.08	0.11	0.0%	0.0%
7132	Gambling Industries	794	1,017	6.4%	$24,453	$41,893	0.93	1.16	0.1%	0.1%
7139	Other Amusement and Recreation Industries	10,453	11,508	2.4%	$17,624	$18,369	1.40	1.44	1.2%	1.2%
	Leisure and Recreation Summary	***13,621***	***15,297***	***2.9%***	***$23,728***	***$25,437***	***0.96***	***0.97***	***1.5%***	***1.6%***

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

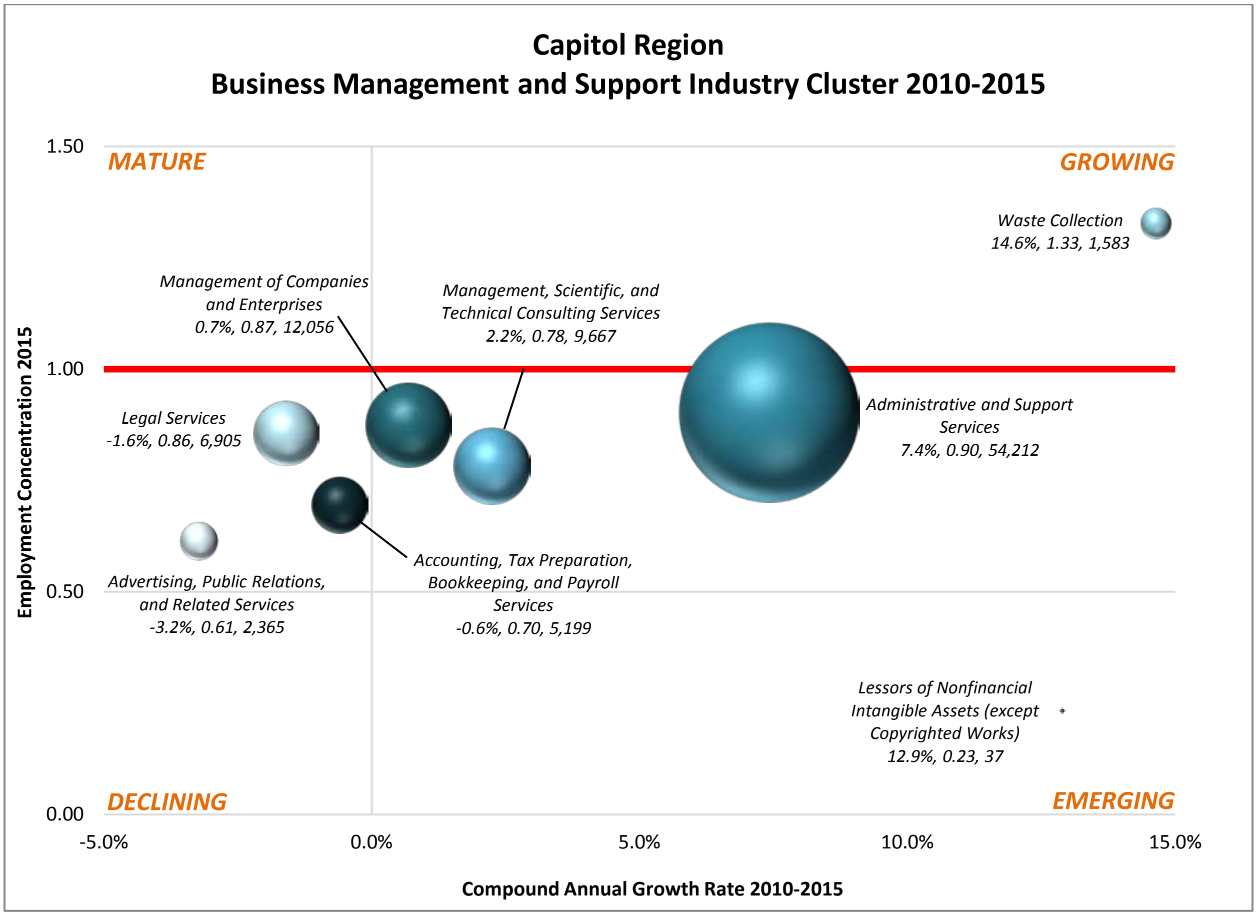
Arts, Entertainment, and Recreation Industry Cluster (continued) – Summary Table

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
ARTS, ENTERTAINMENT, AND RECREATION INDUSTRY CLUSTER (continued) Capitol Region										
Accommodations										
7211	Traveler Accommodation	8,771	8,687	-0.2%	$24,564	$24,713	0.74	0.69	1.0%	0.9%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	403	403	-0.1%	$24,425	$23,141	1.45	1.31	0.0%	0.0%
7213	Rooming and Boarding Houses	16	21	8.0%	$25,578	$15,681	0.22	0.22	0.0%	0.0%
Accommodations Summary		***9,190***	***9,111***	***-0.2%***	***$24,560***	***$24,623***	***0.75***	***0.70***	***1.0%***	***0.9%***
Transportation Services										
4811	Scheduled Air Transportation	591	605	0.6%	$46,000	$45,500	0.25	0.24	0.1%	0.1%
4853	Taxi and Limousine Service	221	315	9.2%	$24,508	$24,914	0.62	0.68	0.0%	0.0%
4855	Charter Bus Industry	125	125	0.1%	$35,885	$38,402	0.70	0.64	0.0%	0.0%
4859	Other Transit and Ground Passenger Transportation	884	851	-0.9%	$30,136	$31,698	1.09	1.02	0.1%	0.1%
4872	Scenic and Sightseeing Transportation, Water	34	60	15.1%	$23,200	$24,308	0.28	0.46	0.0%	0.0%
5615	Travel Arrangement and Reservation Services	604	438	-7.7%	$52,883	$54,446	0.49	0.35	0.1%	0.0%
Transportation Services Summary		***2,458***	***2,394***	***-0.7%***	***$39,225***	***$38,622***	***0.49***	***0.44***	***0.3%***	***0.2%***
ARTS, ENTERTAINMENT, AND RECREATION INDUSTRY CLUSTER SUMMARY		***87,815***	***99,964***	***3.3%***	***$18,958***	***$19,213***	***0.90***	***0.89***	***9.7%***	***10.3%***

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 employed 92,024 people, showed an employment concentration of 0.86, and grew by 4.4 percent annually. The average annual wage in this cluster was $49,723. Administrative and Support Services reported the largest employment with 54,212 employees. Waste Collection recorded the largest growth rate over the study period at 14.6 percent and held the highest employment concentration at 1.33.



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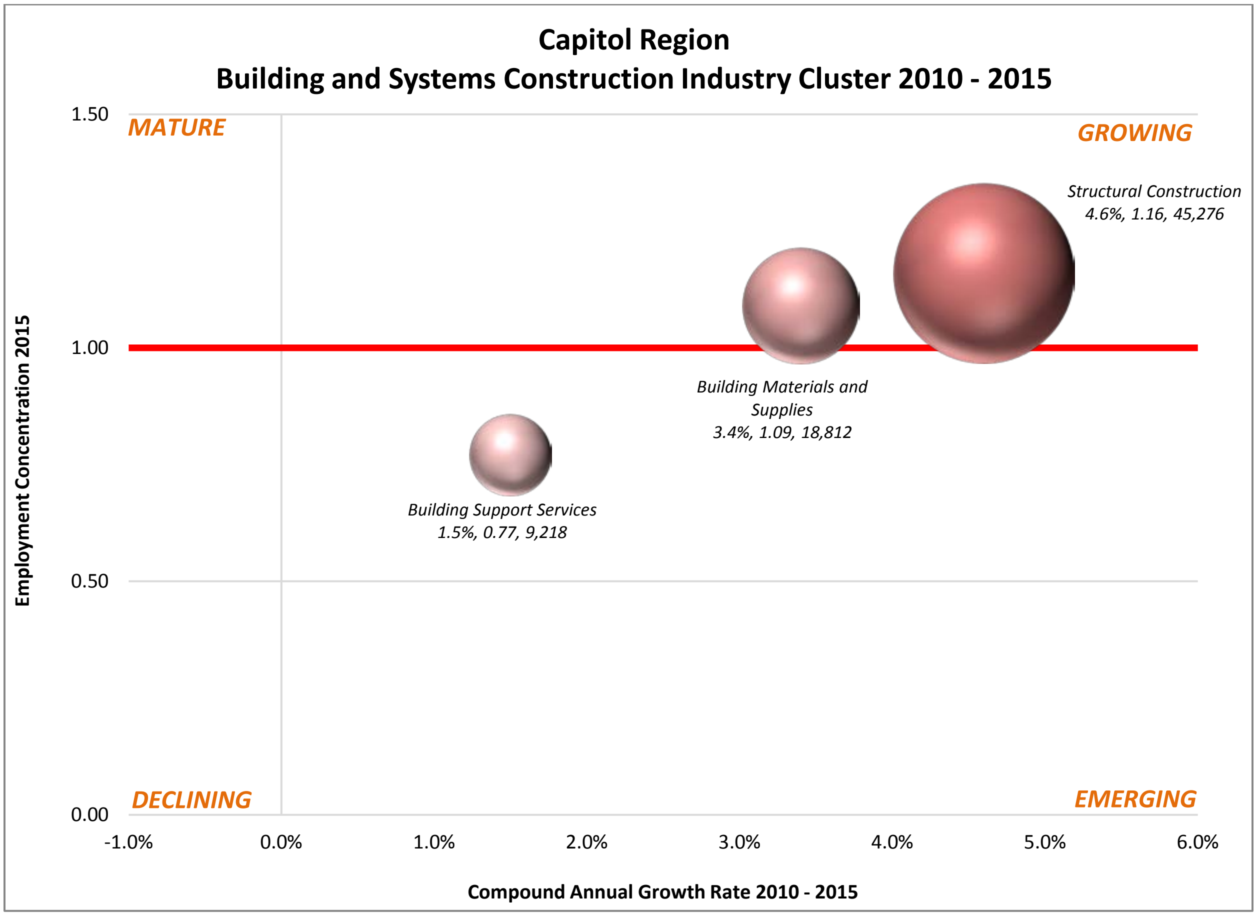
Business Management and Support Industry Cluster – Summary Table

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
BUSINESS MANAGEMENT AND SUPPORT INDUSTRY CLUSTER Capitol Region										
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	23	37	12.9%	$81,999	$77,130	0.13	0.23	0.0%	0.0%
5411	Legal Services	7,363	6,905	-1.6%	$78,921	$78,315	0.90	0.86	0.8%	0.7%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	5,326	5,199	-0.6%	$59,252	$58,087	0.76	0.7	0.6%	0.5%
5416	Management, Scientific, and Technical Consulting Services	8,847	9,667	2.2%	$68,239	$66,100	0.85	0.78	1.0%	1.0%
5418	Advertising, Public Relations, and Related Services	2,697	2,365	-3.2%	$58,610	$71,624	0.77	0.61	0.3%	0.2%
5511	Management of Companies and Enterprises	11,729	12,056	0.7%	$73,977	$77,715	0.97	0.87	1.3%	1.2%
561	Administrative and Support Services	40,710	54,212	7.4%	$35,757	$35,211	0.79	0.90	4.5%	5.6%
5621	Waste Collection	916	1,583	14.6%	$49,934	$47,952	0.94	1.33	0.1%	0.2%
BUSINESS MANAGEMENT AND SUPPORT INDUSTRY CLUSTER SUMMARY		*77,612*	*92,024*	*4.4%*	*$51,918*	*$49,723*	*0.83*	*0.86*	*8.6%*	*9.5%*

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 is composed of the following three industry sub-clusters: Structural Construction, Building Materials and Supplies, and Building Support Services. The industry cluster had an employment concentration of 1.07, employed 73,306 workers, had an average annual wage of $50,714, and grew by 3.9 percent. Support Activities for Forestry had the highest annual growth rate of 27.6 percent annually, and also had the highest employment concentration in 2015 of 3.02. This industry was a part of the Building Materials and Supplies sub-cluster. Logging, also in the Building Materials and Supplies sub-cluster, grew at 20.7 percent annually, the second highest growth rate in this cluster. Land Subdivision, in the Structural Construction sub-cluster, reported the highest average annual wages in 2015 at $91,260.



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Building and Systems Construction Industry Cluster – Summary Table

NAICS Code	Industry Description (BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER – Capitol Region)	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2011-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
	Structural Construction									
2361	Residential Building Construction	4,742	6,076	6.4%	$51,837	$49,881	0.98	1.04	0.5%	0.6%
2362	Nonresidential Building Construction	4,381	4,422	0.2%	$78,598	$71,600	1.33	1.18	0.5%	0.5%
2372	Land Subdivision	493	384	-6.1%	$86,274	$91,260	0.99	0.80	0.1%	0.0%
2373	Highway, Street, and Bridge Construction	2,082	2,495	4.6%	$84,174	$77,265	1.73	1.90	0.2%	0.3%
2379	Other Heavy and Civil Engineering Construction	346	381	2.4%	$87,115	$83,595	0.80	0.80	0.0%	0.0%
2381	Foundation, Structure, and Building Exterior Contractors	5,760	8,193	9.2%	$43,938	$45,070	1.28	1.48	0.6%	0.8%
2382	Building Equipment Contractors	10,641	12,273	3.6%	$60,712	$59,789	1.16	1.09	1.2%	1.3%
2383	Building Finishing Contractors	5,720	7,236	6.1%	$42,186	$41,966	1.00	1.07	0.6%	0.7%
2389	Other Specialty Trade Contractors	3,591	3,816	1.5%	$55,010	$55,106	1.19	1.06	0.4%	0.4%
	Structural Construction Summary	***37,754***	***45,276***	***4.6%***	***$57,634***	***$55,136***	***1.16***	***1.16***	***4.2%***	***4.7%***

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

NAICS Code	Industry Description	Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2011-2015	Average Annual Wages 2010	Average Annual Wages 2015	Employment Concentration 2010	Employment Concentration 2015	Percent of Regional Employment 2010	Percent of Regional Employment 2015
BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER (continued) Capitol Region										
Building Materials and Supplies										
1133	Logging	64	136	20.7%	$38,897	$51,303	0.56	1.11	0.0%	0.0%
1153	Support Activities for Forestry	122	323	27.6%	$50,703	$54,081	1.42	3.02	0.0%	0.0%
3211	Sawmills and Wood Preservation	530	454	-3.8%	$51,884	$53,636	2.33	1.87	0.1%	0.0%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	239	200	-4.3%	$51,211	$42,387	1.77	1.21	0.0%	0.0%
3219	Other Wood Product Manufacturing	1,293	1,567	4.9%	$44,001	$40,914	1.43	1.69	0.1%	0.2%
3255	Paint, Coating, and Adhesive Manufacturing	77	85	2.5%	$79,223	$70,453	0.25	0.30	0.0%	0.0%
3272	Glass and Glass Product Manufacturing	149	235	12.0%	$41,960	$43,304	0.36	0.54	0.0%	0.0%
3273	Cement and Concrete Product Manufacturing	900	1,689	17.1%	$60,761	$56,089	1.07	1.88	0.1%	0.2%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	189	261	8.4%	$80,416	$61,799	0.56	0.82	0.0%	0.0%
3351	Electric Lighting Equipment Manufacturing	98	102	0.8%	$70,991	$73,799	0.23	0.23	0.0%	0.0%
337	Furniture and Related Products Manufacturing	1,360	1,445	1.5%	$38,036	$36,983	0.70	0.70	0.2%	0.1%
4233	Lumber and Other Construction Materials Merchant Wholesalers	1,298	1,543	4.4%	$51,595	$48,946	1.23	1.34	0.1%	0.2%

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) Capitol Region		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2011-2015	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)										
4237	**Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers**	1,414	1,486	1.2%	$56,563	$54,418	0.99	1.01	0.2%	0.2%
4441	**Building Material and Supplies Dealers**	6,832	7,289	1.6%	$34,397	$31,848	1.11	1.10	0.8%	0.8%
4442	**Lawn and Garden Equipment and Supplies Stores**	1,060	1,145	1.9%	$40,129	$34,516	1.78	1.60	0.1%	0.1%
5323	**General Rental Centers**	242	161	-9.7%	$43,920	$46,767	0.87	0.68	0.0%	0.0%
5324	**Commercial and Industrial Machinery and Equipment Rental and Leasing**	600	692	3.7%	$65,722	$65,196	0.68	0.64	0.1%	0.1%
Building Materials and Supplies Summary		***16,467***	***18,812***	***3.4%***	***$43,772***	***$41,996***	***1.02***	***1.09***	***1.8%***	***1.9%***

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

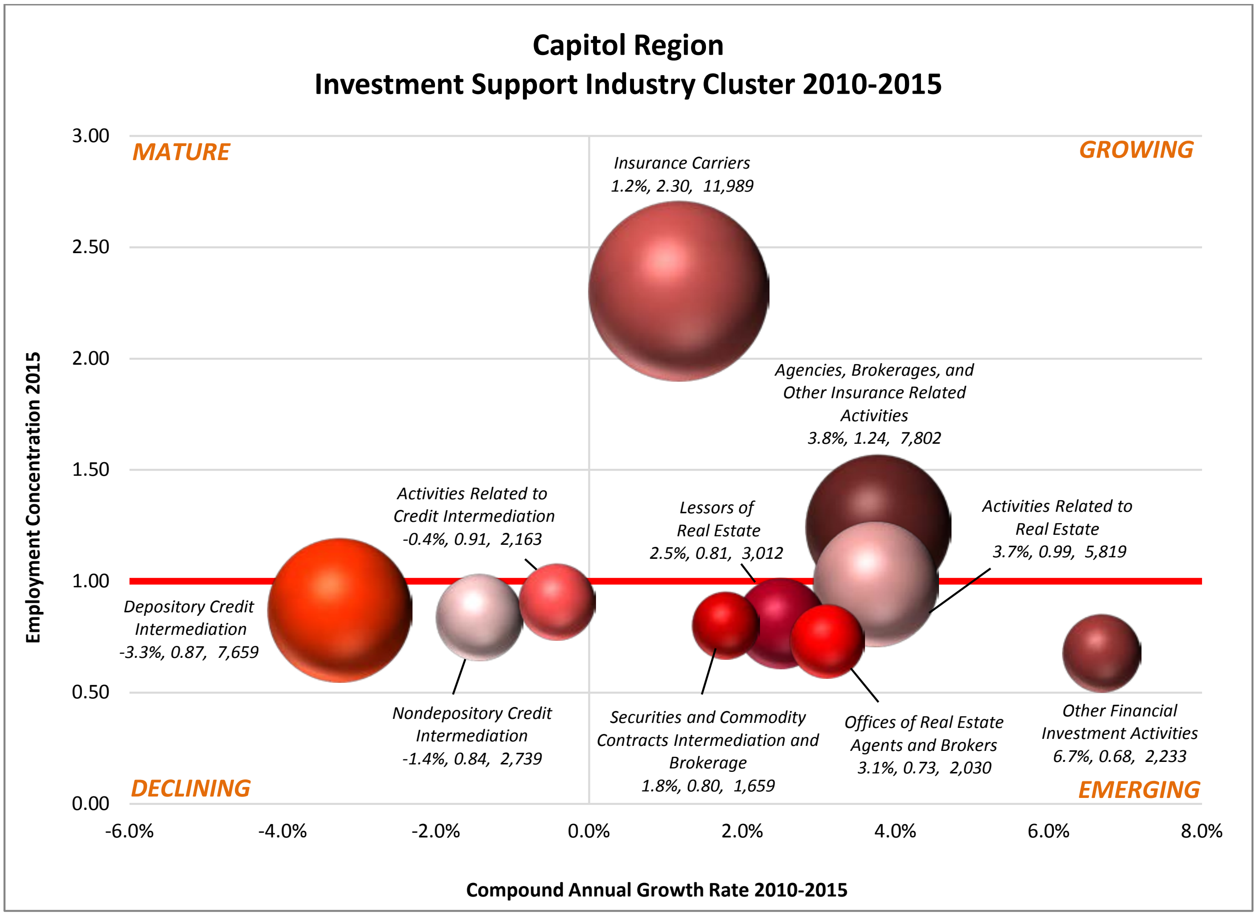
Building and Systems Construction Industry Cluster (continued) – Summary Table

BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER (continued) Capitol Region		Average Annual Employment 2010	Average Annual Employment 2015	Compound Annual Growth Rate 2011-2015	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 Support Services										
4232	Furniture and Home Furnishing Merchant Wholesalers	208	271	6.9%	$46,902	$44,687	0.20	0.22	0.0%	0.0%
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	1,165	1,216	1.1%	$65,924	$67,266	0.42	0.42	0.1%	0.1%
4421	Furniture Stores	1,546	1,500	-0.7%	$32,511	$35,293	1.15	1.21	0.2%	0.2%
4422	Home Furnishings Stores	1,488	1,885	6.1%	$32,269	$28,987	0.86	0.99	0.2%	0.2%
4431	Electronics and Appliance Stores	3,403	3,344	-0.4%	$54,280	$54,258	0.85	0.90	0.4%	0.3%
4812	Nonscheduled Air Transportation	138	103	-7.1%	$59,096	$71,892	0.68	0.48	0.0%	0.0%
5629	Remediation and Other Waste Management Services	742	899	4.9%	$46,494	$45,576	1.04	1.01	0.1%	0.1%
Building Support Services Summary		*8,689*	*9,218*	*1.5%*	*$47,435*	*$46,790*	*0.74*	*0.77*	*1.0%*	*1.0%*
BUILDING AND SYSTEMS CONSTRUCTION INDUSTRY CLUSTER SUMMARY		*62,909*	*73,306*	*3.9%*	*$52,597*	*$50,714*	*1.04*	*1.07*	*7.0%*	*7.6%*

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 had 47,105 employees, grew by 1.2 percent annually, and reported an employment concentration of 1.08. The cluster posted 2015 average annual wages of $70,820; this is well above the Capitol Region's total industry 2015 average annual wage of $52,774. Insurance Carriers was the largest industry with 11,989 employees, and had the largest employment concentration at 2.30. Over the study period, Other Financial Investment Activities experienced the largest growth rate at 6.7 percent annually. Securities and Commodity Contracts Intermediation and Brokerage showed the highest average annual wage in 2015 at $130,393.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

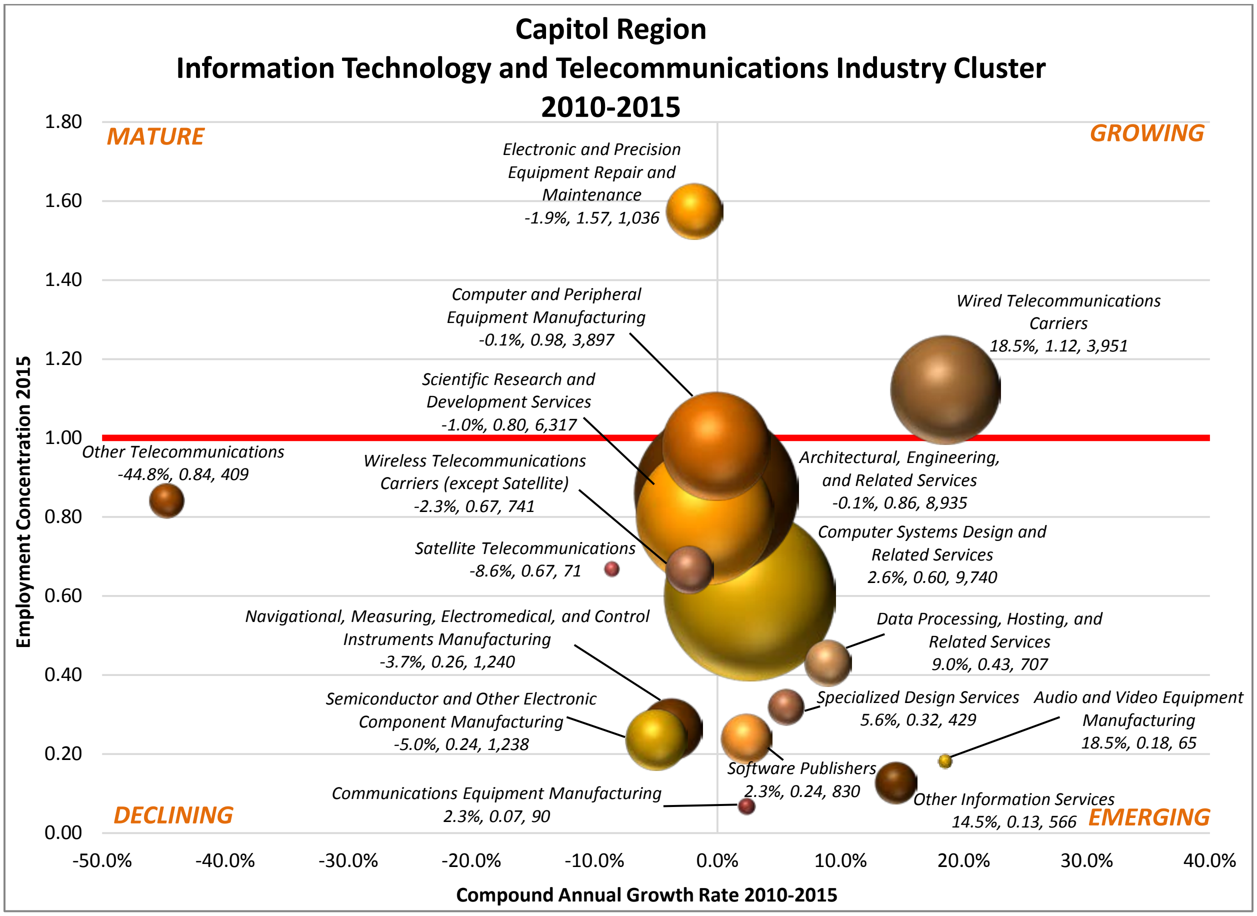
Investment Support Industry Cluster – Summary Table

NAICS Code	Industry Description (INVESTMENT SUPPORT INDUSTRY CLUSTER – Capitol Region)	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
5221	**Depository Credit Intermediation**	8,743	7,659	-3.3%	$61,617	$62,700	0.88	0.87	1.0%	0.8%
5222	**Nondepository Credit Intermediation**	2,901	2,739	-1.4%	$85,755	$89,366	0.92	0.84	0.3%	0.3%
5223	**Activities Related to Credit Intermediation**	2,200	2,163	-0.4%	$69,290	$86,938	1.09	0.91	0.2%	0.2%
5231	**Securities and Commodity Contracts Intermediation and Brokerage**	1,546	1,659	1.8%	$116,943	$130,393	0.73	0.80	0.2%	0.2%
5239	**Other Financial Investment Activities**	1,723	2,233	6.7%	$63,797	$83,919	0.62	0.68	0.2%	0.2%
5241	**Insurance Carriers**	11,445	11,989	1.2%	$76,503	$83,119	2.07	2.30	1.3%	1.2%
5242	**Agencies, Brokerages, and Other Insurance Related Activities**	6,727	7,802	3.8%	$69,207	$70,851	1.20	1.24	0.7%	0.8%
5311	**Lessors of Real Estate**	2,728	3,012	2.5%	$31,053	$35,576	0.74	0.81	0.3%	0.3%
5312	**Offices of Real Estate Agents and Brokers**	1,796	2,030	3.1%	$52,317	$56,650	0.71	0.73	0.2%	0.2%
5313	**Activities Related to Real Estate**	5,024	5,819	3.7%	$41,678	$42,574	0.91	0.99	0.6%	0.6%
INVESTMENT SUPPORT INDUSTRY CLUSTER SUMMARY		***44,834***	***47,105***	***1.2%***	***$66,019***	***$70,820***	***1.05***	***1.08***	***5.0%***	***4.9%***

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

The Information Technology and Telecommunications industry cluster employed 40,261 workers in 2015, declined by 0.9 percent annually, and had an employment concentration of 0.60. The average annual wages for this cluster was $107,020, more than double that of the region. The largest industry was Computer Systems Design and Related Services with 9,740 employees. Wired Telecommunication Carriers and Audio and Video Equipment Manufacturing experienced the largest growth rate at 18.5 percent each, while Electronic and Precision Equipment Manufacturing had the highest employment concentration rate at 1.57.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

Information Technology and Telecommunications Industry Cluster – Summary Table

INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER Capitol Region		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									
3341	Computer and Peripheral Equipment Manufacturing	3,914	3,897	-0.1%	$213,186	$203,220	1.10	0.98	0.4%	0.4%
3342	Communications Equipment Manufacturing	82	90	2.3%	$126,249	$54,810	0.05	0.07	0.0%	0.0%
3343	Audio and Video Equipment Manufacturing	33	65	18.5%	$74,970	$51,362	0.09	0.18	0.0%	0.0%
3344	Semiconductor and Other Electronic Component Manufacturing	1,519	1,238	-5.0%	$77,762	$76,727	0.28	0.24	0.2%	0.1%
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	1,444	1,240	-3.7%	$75,183	$78,111	0.26	0.26	0.2%	0.1%
5112	Software Publishers	756	830	2.3%	$98,383	$89,580	0.27	0.24	0.1%	0.1%
5171	Wired Telecommunications Carriers	2,003	3,951	18.5%	$66,401	$82,086	0.91	1.12	0.2%	0.4%
5172	Wireless Telecommunications Carriers (except Satellite)	812	741	-2.3%	$69,195	$74,269	0.62	0.67	0.1%	0.1%
5174	Satellite Telecommunications	102	71	-8.6%	$67,463	$55,826	0.40	0.67	0.0%	0.0%
5179	Other Telecommunications	4,396	409	-44.8%	$88,987	$90,847	1.96	0.84	0.5%	0.0%
5182	Data Processing, Hosting, and Related Services	502	707	9.0%	$95,037	$84,636	0.43	0.43	0.1%	0.1%
5191	Other Information Services	329	566	14.5%	$69,159	$66,249	0.14	0.13	0.0%	0.1%

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

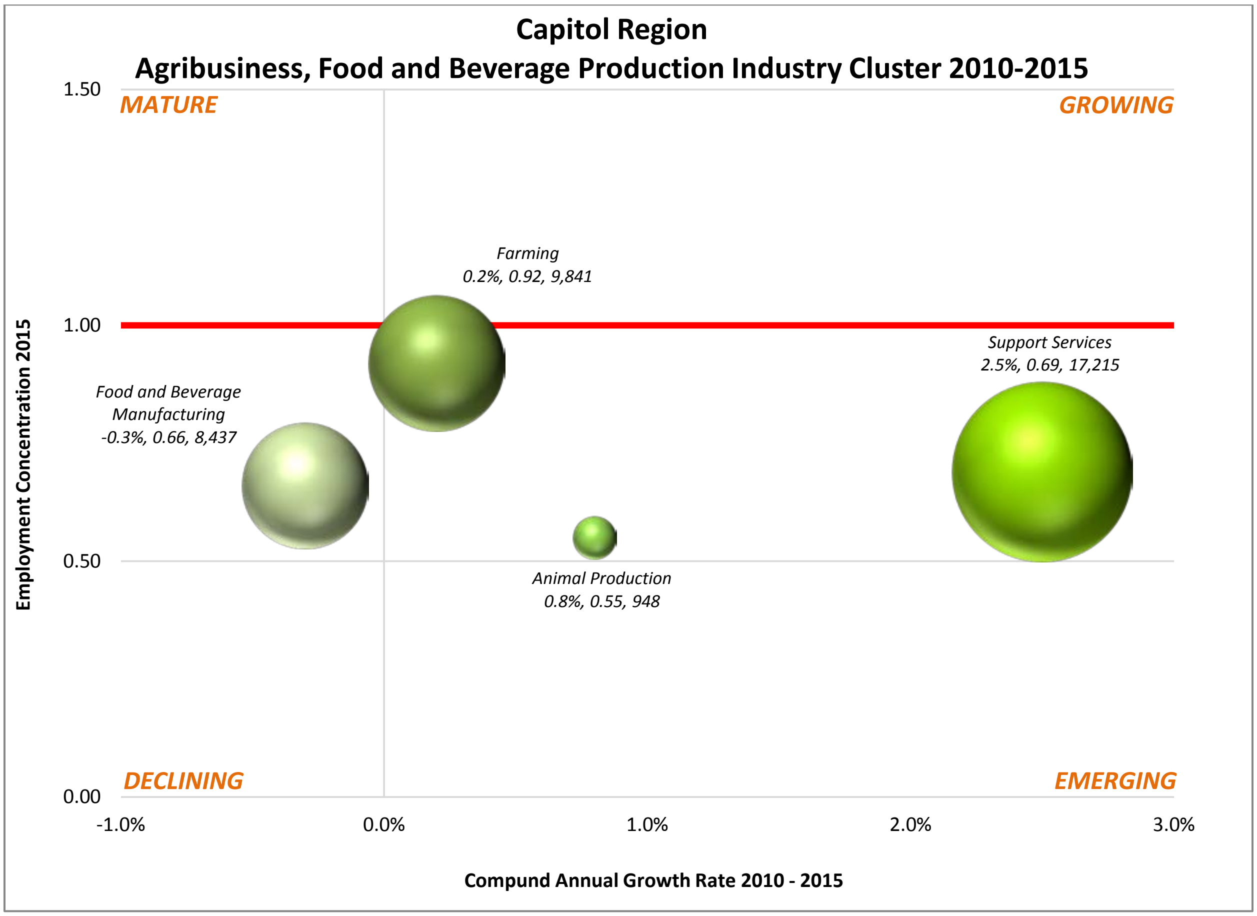
Information Technology and Telecommunications Industry Cluster (continued) – Summary Table

INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER (CONTINUED) Capitol Region		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									
5413	Architectural, Engineering, and Related Services	8,977	8,935	-0.1%	$85,432	$85,653	0.91	0.86	1.0%	0.9%
5414	Specialized Design Services	345	429	5.6%	$47,004	$53,935	0.29	0.32	0.0%	0.0%
5415	Computer Systems Design and Related Services	8,784	9,740	2.6%	$102,415	$102,410	0.69	0.60	1.0%	1.0%
5417	Scientific Research and Development Services	6,583	6,317	-1.0%	$130,749	$139,304	0.89	0.80	0.7%	0.7%
8112	Electronic and Precision Equipment Repair and Maintenance	1,117	1,036	-1.9%	$59,914	$56,629	1.47	1.57	0.1%	0.1%
INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS INDUSTRY CLUSTER SUMMARY		*41,696*	*40,261*	*-0.9%*	*$105,913*	*$107,020*	*0.68*	*0.60*	*4.6%*	*4.2%*

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

The Agribusiness, Food and Beverage Production industry cluster is composed of the following four industry sub-clusters: Farming, Food and Beverage Manufacturing, Support Services, and Animal Production. The industry cluster had 36,441 employees, grew by 1.1 percent annually, reported an average annual wage of $40,204, and employment concentration of 0.72. Oilseed and Grain Farming, in the Farming sub-cluster, held the largest concentration at 6.69 in 2015. Animal Food Manufacturing, part of the Animal Production sub-cluster, had the highest growth rate at 32.6 percent annually, followed by Dairy Product Manufacturing, in the Food and Beverage Production sub-cluster, at 23.1 percent. The highest wages were reported in Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing at $102,167.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

Agribusiness, Food and Beverage Production Industry Cluster – Summary Table

AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER Capitol Region		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**									
Support Services										
1151	Support Activities for Crop Production	6,353	7,239	3.3%	$25,839	$27,164	0.57	0.58	0.7%	0.7%
1152	Support Activities for Animal Production	91	147	12.7%	$21,795	$20,040	0.51	0.88	0.0%	0.0%
4244	Grocery and Related Product Merchant Wholesalers	4,726	5,147	2.2%	$53,582	$51,366	0.80	0.83	0.5%	0.5%
4245	Farm Product Raw Material Merchant Wholesalers	287	380	7.3%	$55,075	$ 54,411	2.82	3.08	0.0%	0.0%
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	905	969	1.7%	$61,053	$65,438	0.83	0.79	0.1%	0.1%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	1,921	1,898	-0.3%	$57,206	$57,735	0.66	0.63	0.2%	0.2%
4452	Specialty Food Stores	1,327	1,434	2.0%	$22,599	$19,367	0.69	0.78	0.1%	0.1%
Support Services Summary		***15,610***	***17,215***	***2.5%***	***$ 40,379***	***$ 39,816***	***0.67***	***0.69***	***1.7%***	***1.8%***

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

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 (continued) – Summary Table

AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER (continued) Capitol Region		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									
Farming										
1111	Oilseed and Grain Farming	1,458	1,392	-1.2%	$35,036	$37,292	7.86	6.69	0.2%	0.1%
1112	Vegetable and Melon Farming	1,832	1,683	-2.1%	$39,633	$36,853	0.89	0.83	0.2%	0.2%
1113	Fruit and Tree Nut Farming	4,625	4,980	1.9%	$26,885	$30,961	0.78	0.82	0.5%	0.5%
1114	Greenhouse, Nursery, and Floriculture Production	871	1,063	5.1%	$28,286	$31,321	0.53	0.63	0.1%	0.1%
1119	Other Crop Farming	973	723	-7.2%	$35,399	$41,269	1.14	1.00	0.1%	0.1%
Farming Summary		***9,759***	***9,841***	***0.2%***	***$31,471***	***$33,660***	***0.92***	***0.92***	***1.1%***	***1.0%***

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 (continued) – Summary Table

NAICS Code	AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER (continued) Capitol Region – 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
	Food and Beverage Manufacturing Industry Cluster									
3111	Animal Food Manufacturing	46	143	32.6%	$40,636	$46,559	0.20	0.66	0.0%	0.0%
3112	Grain and Oilseed Milling	931	946	0.4%	$54,021	$53,156	3.64	3.72	0.1%	0.1%
3113	Sugar and Confectionery Product Manufacturing	89	122	8.2%	$23,341	$33,443	0.24	0.33	0.0%	0.0%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	2,279	1,726	-6.7%	$55,016	$47,188	1.17	0.96	0.3%	0.2%
3115	Dairy Product Manufacturing	172	394	23.1%	$55,800	$56,281	0.16	0.37	0.0%	0.0%
3116	Animal Slaughtering and Processing	171	214	5.8%	$55,651	$68,280	0.13	0.17	0.0%	0.0%
3118	Bakeries and Tortilla Manufacturing	1,298	1,171	-2.5%	$44,516	$33,722	0.53	0.47	0.1%	0.1%
3119	Other Food Manufacturing	1,050	1,202	3.4%	$54,662	$58,281	0.74	0.70	0.1%	0.1%
3121	Beverage Manufacturing	1,899	1,845	-0.7%	$50,574	$44,365	0.73	0.59	0.2%	0.2%
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	146	196	7.7%	$102,679	$102,167	1.27	1.60	0.0%	0.0%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	456	479	1.2%	$49,134	$50,811	1.48	1.20	0.1%	0.0%
	Food and Beverage Manufacturing Summary	***8,536***	***8,437***	***-0.3%***	***$52,401***	***$49,184***	***0.70***	***0.66***	***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.

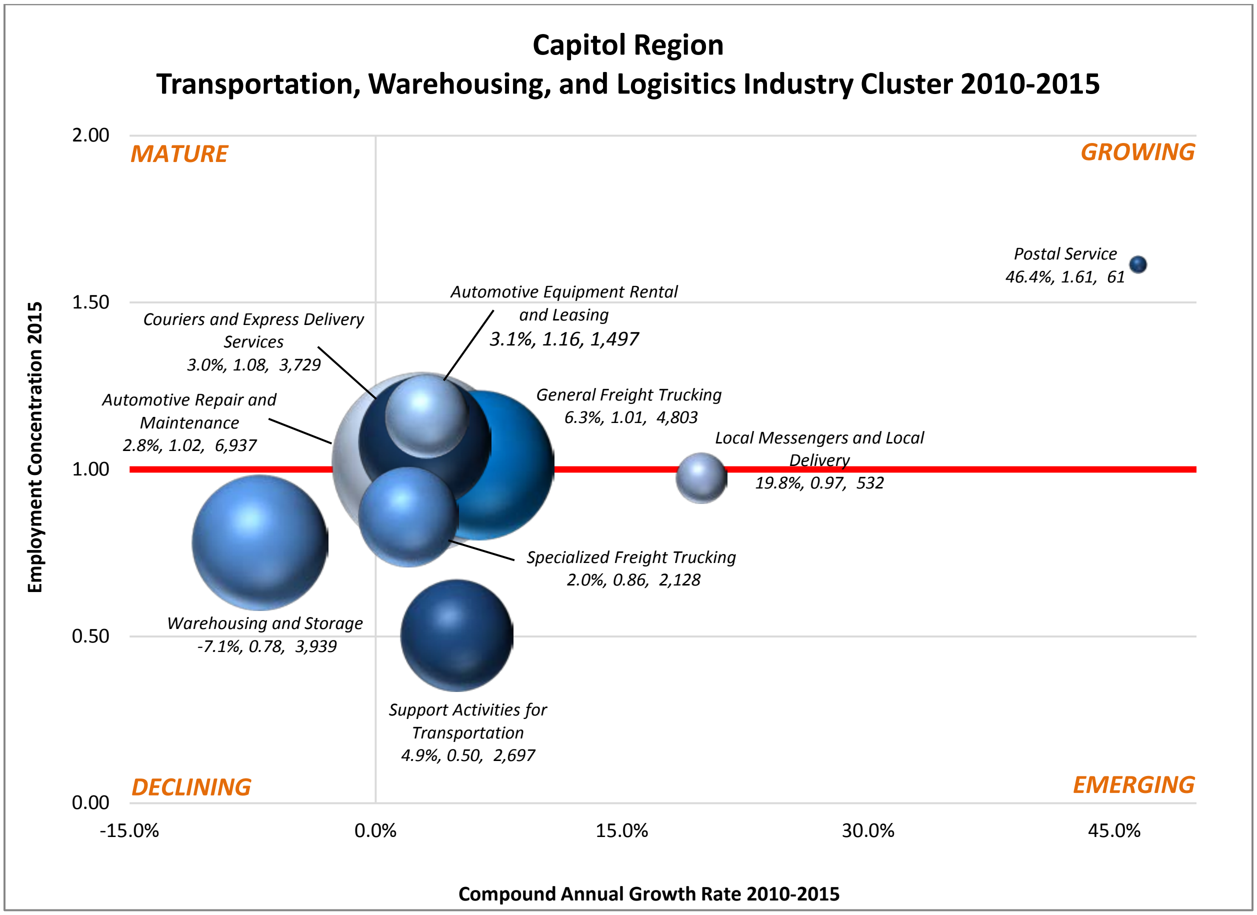
Agribusiness, Food and Beverage Production Industry Cluster (continued) – Summary Table

AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER (continued) Capitol Region		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									
Animal Production Industry Cluster										
1121	Cattle Ranching and Farming	647	578	-2.8%	$30,172	$31,972	0.46	0.42	0.1%	0.1%
1123	Poultry and Egg Production	39	38	-1.1%	$31,349	$30,320	0.23	0.26	0.0%	0.0%
1124	Sheep and Goat Farming	7	9	7.9%	$18,993	$36,132	0.21	0.32	0.0%	0.0%
1125	Aquaculture	30	45	10.6%	$71,900	$55,064	0.95	2.02	0.0%	0.0%
1129	Other Animal Production	197	279	9.1%	$39,471	$39,487	1.38	2.01	0.0%	0.0%
Animal Production Summary		***920***	***948***	***0.8%***	***$33,498***	***$35,252***	***0.52***	***0.55***	***0.1%***	***0.1%***
AGRIBUSINESS, FOOD AND BEVERAGE PRODUCTION INDUSTRY CLUSTER SUMMARY		*34,825*	*36,441*	*1.1%*	*$ 40,647*	*$ 40,204*	*0.73*	*0.72*	*3.9%*	*3.8%*

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

The Transportation, Warehousing, and Logistics industry cluster showed an employment concentration of 0.89, employed 26,322 workers, and grew at a rate of 2.0 percent annually. The average annual wage for this cluster was $41,298. The largest industry was Automotive Repair and Maintenance, with 6,937 employees in 2015. Postal Service saw the largest growth rate over the study period at 46.4 percent and recorded the highest concentration at 1.61.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

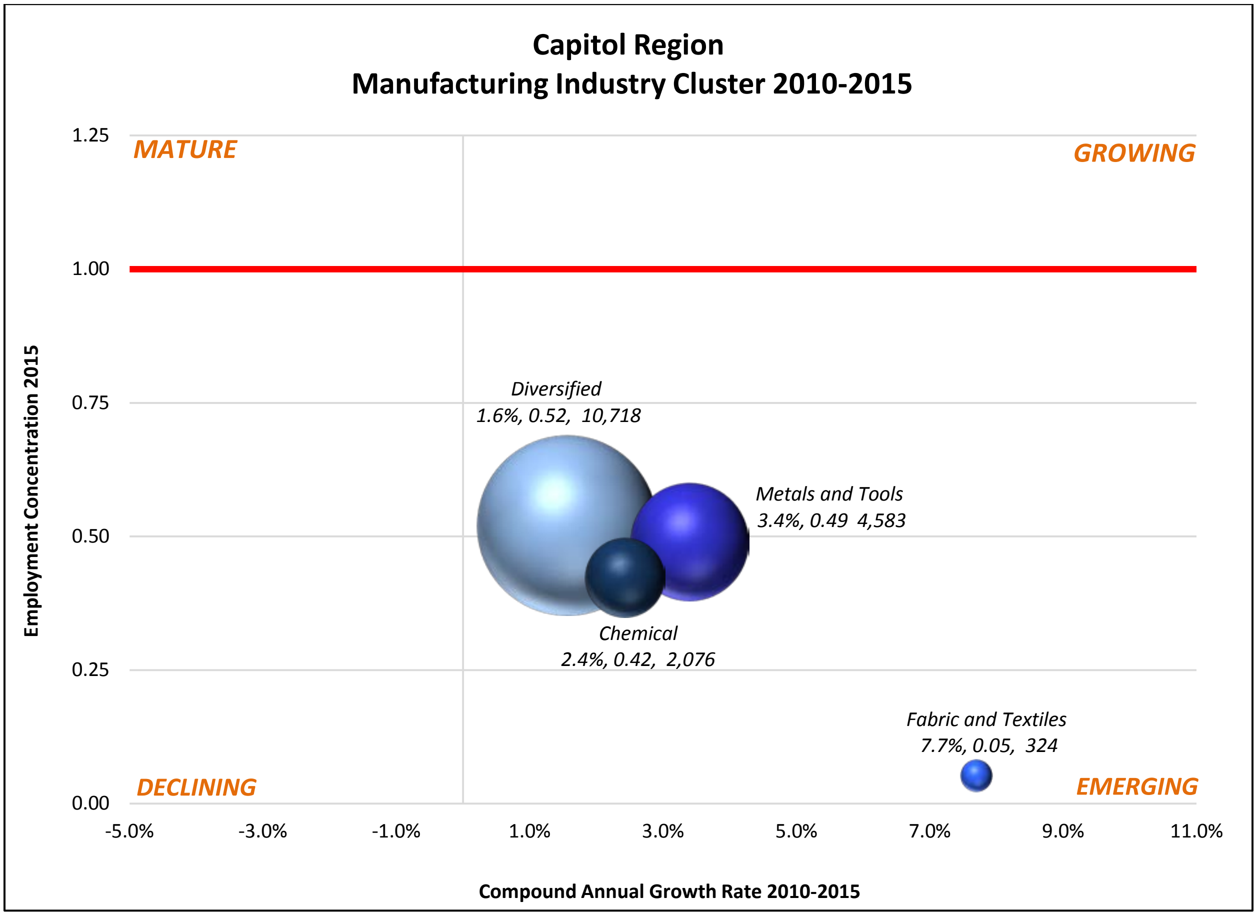
Transportation, Warehousing, and Logistics Industry Cluster – Summary Table

TRANSPORTATION, WAREHOUSING, AND LOGISTICS INDUSTRY CLUSTER Capitol Region		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									
4841	General Freight Trucking	3,764	4,803	6.3%	$41,150	$38,860	0.90	1.01	0.4%	0.5%
4842	Specialized Freight Trucking	1,966	2,128	2.0%	$37,129	$39,801	0.88	0.86	0.2%	0.2%
488	Support Activities for Transportation	2,225	2,697	4.9%	$50,751	$48,405	0.46	0.50	0.2%	0.3%
4911	Postal Service	13	61	46.4%	$31,942	$28,161	0.25	1.61	0.0%	0.0%
4921	Couriers and Express Delivery Services	3,317	3,729	3.0%	$44,779	$44,716	1.05	1.08	0.4%	0.4%
4922	Local Messengers and Local Delivery	258	532	19.8%	$33,117	$25,199	0.57	0.97	0.0%	0.1%
4931	Warehousing and Storage	5,277	3,939	-7.1%	$46,867	$47,944	1.25	0.78	0.6%	0.4%
5321	Automotive Equipment Rental and Leasing	1,325	1,497	3.1%	$42,951	$41,154	1.18	1.16	0.1%	0.2%
8111	Automotive Repair and Maintenance	6,203	6,937	2.8%	$37,007	$36,454	.99	1.02	0.7%	0.7%
TRANSPORTATION, WAREHOUSING, AND LOGISTICS INDUSTRY CLUSTER SUMMARY		*24,348*	*26,322*	*2.0%*	*$42,388*	*$41,298*	*0.92*	*0.89*	*2.7%*	*2.7%*

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 had 17,701 jobs, grew by 2.2 percent annually, and had an employment concentration of 0.43. The cluster posted annual average wages of $57,720; this is above the Capital Region's total industry 2015 annual average wage of $52,774. This industry cluster is comprised of four sub-clusters, listed in descending order: Diversified, Metals and Tools, Chemical, and Fabric and Textiles Manufacturing. The largest sub-cluster, Diversified Manufacturing, provided 10,718 jobs, grew by 1.6 percent annually, and has an employment concentration of 0.52. The Metals and Tools Manufacturing sub-cluster provided 4,583 jobs, grew by 3.4 percent annually, and has an employment concentration of 0.49. The Chemical Manufacturing sub-cluster provided 2,076 jobs, grew by 2.4 percent annually, and has an employment concentration of 0.42. The Fabric and Textiles Manufacturing sub-cluster provided 324 jobs, grew by 7.7 percent annually, and has an employment concentration of 0.05 percent.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

Manufacturing 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
MANUFACTURING INDUSTRY CLUSTER Capitol Region										
Diversified Manufacturing										
3222	Converted Paper Product Manufacturing	538	753	8.8%	$58,293	$60,780	0.42	0.62	0.1%	0.1%
3231	Printing and Related Support Activities	1,738	1,779	0.6%	$46,728	$48,775	0.62	0.69	0.2%	0.2%
3332	Industrial Machinery Manufacturing	145	274	17.3%	$43,434	$51,346	0.17	0.30	0.0%	0.0%
3333	Commercial and Service Industry Machinery Manufacturing	129	108	-4.3%	$54,232	$67,031	0.19	0.16	0.0%	0.0%
3339	Other General Purpose Machinery Manufacturing	416	526	6.1%	$59,411	$54,905	0.42	0.54	0.0%	0.1%
3359	Other Electrical Equipment and Component Manufacturing	151	259	14.6%	$62,187	$59,402	0.21	0.33	0.0%	0.0%
336	Transportation Equipment Manufacturing	3,092	3,398	2.4%	$80,688	$91,528	0.48	0.51	0.3%	0.4%
3399	Other Miscellaneous Manufacturing	921	881	-1.1%	$45,014	$49,532	0.49	0.47	0.1%	0.1%
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	1,657	1,661	0.1%	$44,379	$44,709	0.79	0.73	0.2%	0.2%
4239	Miscellaneous Durable Goods Merchant Wholesalers	1,288	1,079	-4.3%	$43,038	$42,265	0.50	0.41	0.1%	0.1%
Diversified Manufacturing Summary		***10,074***	***10,718***	***1.6%***	***$57,556***	***$62,756***	***0.50***	***0.52***	***1.1%***	***1.1%***

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) Capitol Region — 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
	Metals and Tools Manufacturing									
3321	Forging and Stamping	18	19	2.2%	$69,017	$63,912	0.03	0.03	0.0%	0.0%
3322	Cutlery and Handtool Manufacturing	24	38	12.3%	$42,384	$35,791	0.16	0.28	0.0%	0.0%
3323	Architectural and Structural Metals Manufacturing	1,342	1,643	5.2%	$49,323	$46,846	0.82	0.89	0.1%	0.2%
3324	Boiler, Tank, and Shipping Container Manufacturing	256	206	-5.3%	$59,214	$54,896	0.80	0.69	0.0%	0.0%
3325	Hardware Manufacturing	6	44	63%	$46,673	$54,781	0.04	0.30	0.0%	0.0%
3326	Spring and Wire Product Manufacturing	38	54	9.0%	$43,523	$41,332	0.21	0.29	0.0%	0.0%
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	888	990	2.7%	$53,442	$52,670	0.37	0.37	0.1%	0.1%
3328	Coating, Engraving, Heat Treating, and Allied Activities	167	247	10.3%	$34,577	$34,889	0.18	0.25	0.0%	0.0%
3329	Other Fabricated Metal Product Manufacturing	553	437	-5.7%	$49,875	$48,106	0.56	0.41	0.1%	0.0%
3335	Metalworking Machinery Manufacturing	494	615	5.7%	$59,338	$58,525	0.71	0.81	0.1%	0.1%
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	224	291	6.8%	$53,972	$46,485	0.34	0.43	0.0%	0.0%
	Metals and Tools Manufacturing Summary	***4,009***	***4,583***	***3.4%***	***$51,808***	***$49,477***	***0.47***	***0.49***	***0.4%***	***0.5%***

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) Capitol Region — 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 Manufacturing									
3256	**Soap, Cleaning Compound, and Toilet Preparation Manufacturing**	184	156	-4.1%	$78,522	$84,192	0.27	0.23	0.0%	0.0%
3259	**Other Chemical Product and Preparation Manufacturing**	49	56	3.1%	$37,446	$44,694	0.14	0.16	0.0%	0.0%
3261	**Plastics Product Manufacturing**	642	767	4.6%	$52,330	$46,182	0.27	0.32	0.1%	0.1%
3262	**Rubber Product Manufacturing**	169	165	-0.6%	$49,156	$43,653	0.50	0.53	0.0%	0.0%
3271	**Clay Product and Refractory Manufacturing**	233	178	-6.5%	$52,819	$43,854	1.43	1.28	0.0%	0.0%
3279	**Other Nonmetallic Mineral Product Manufacturing**	388	398	0.6%	$51,048	$56,722	1.33	1.31	0.0%	0.0%
4246	**Chemical and Allied Products Merchant Wholesalers**	220	356	12.8%	$69,935	$64,421	0.31	0.47	0.0%	0.0%
	Chemical Manufacturing Summary	***1,885***	***2,076***	***2.4%***	***$56,067***	***$53,741***	***0.38***	***0.42***	***0.2%***	***0.2%***

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

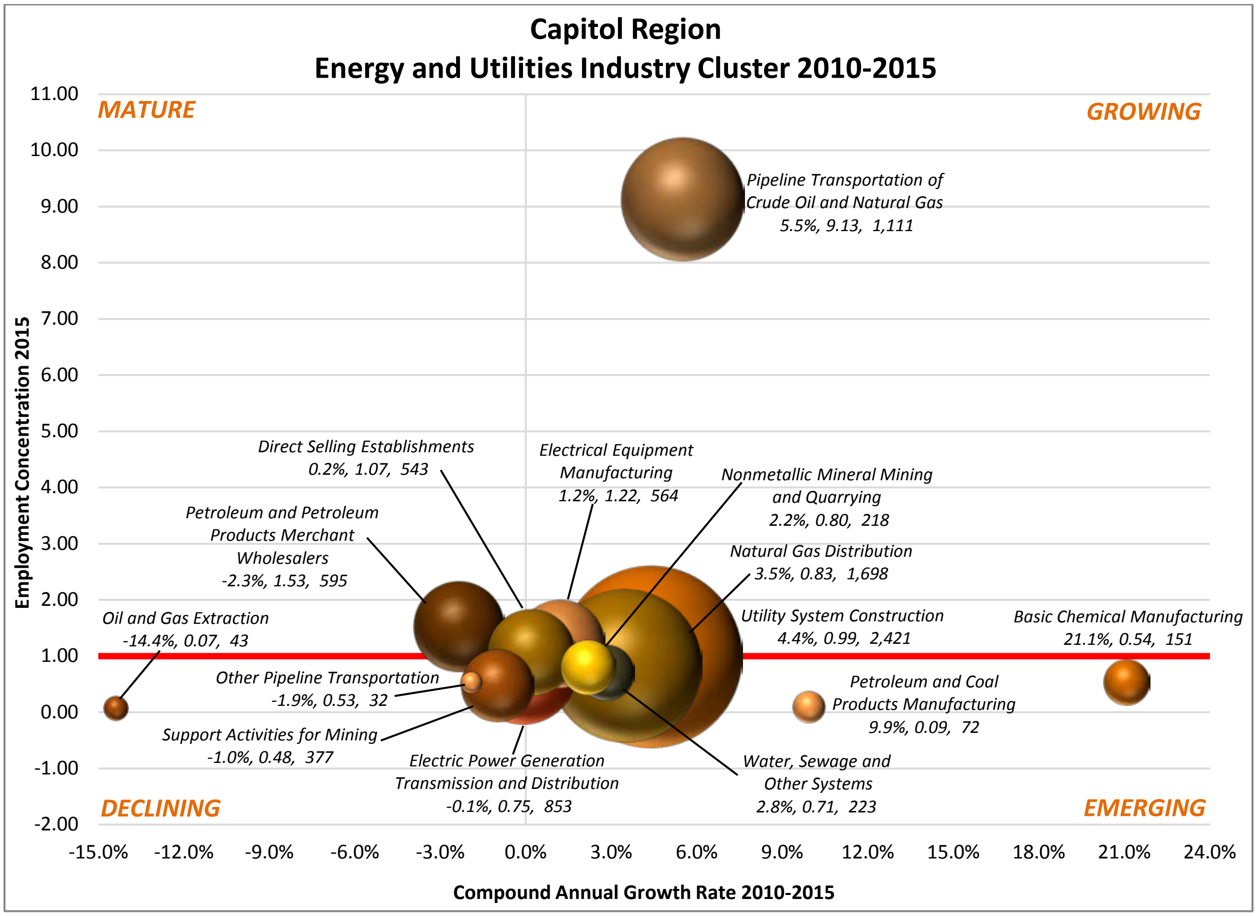
Manufacturing Industry Cluster (continued) – Summary Table

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) Capitol Region										
Fabric and Textiles Manufacturing										
313	Textile Mills	34	15	-18.2%	$28,969	$16,387	0.06	0.03	0.0%	0.0%
3149	Other Textile Product Mills	85	144	14.2%	$37,509	$33,608	0.27	0.47	0.0%	0.0%
3152	Cut and Sew Apparel Manufacturing	63	35	-13.4%	$23,099	$31,278	0.02	0.01	0.0%	0.0%
3169	Other Leather and Allied Product Manufacturing	15	22	10.5%	$42,080	$28,284	0.10	0.18	0.0%	0.0%
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	45	108	24.6%	$64,002	$36,803	0.02	0.05	0.0%	0.0%
Fabric and Textiles Manufacturing Summary		***241***	***324***	***7.7%***	***$37,735***	***$33,253***	***0.04***	***0.05***	***0.0%***	***0.0%***
MANUFACTURING INDUSTRY CLUSTER SUMMARY		***16,209***	***17,701***	***2.2%***	***$55,667***	***$57,720***	***0.40***	***0.43***	***1.8%***	***1.8%***

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

Energy and Utilities Industry Cluster

The Energy and Utilities industry cluster saw an employment increase of 2.6 percent annually, ending the study period with 8,900 employees, and reported an employment concentration of 0.87. The average annual wage for this cluster was $88,907. Pipeline Transportation of Crude Oil and Natural Gas had the highest employment concentration at 9.13. Electric Power Generation, Transmission, and Distribution posted the highest wages at $136,460. The largest industry in the cluster was Utility System Construction with 2,421 employees and an employment concentration of 0.99 in 2015. The largest growth was reported in Basic Chemical Manufacturing at 21.1 percent.



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 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. 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 cluster than found statewide, and industry clusters with a concentration 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 cluster in 2015.

Energy and Utilities Industry Cluster – Summary Table

NAICS Code	ENERGY AND UTILITIES INDUSTRY CLUSTER Capitol Region — 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
2111	Oil and Gas Extraction	79	43	-14.4%	$79,159	$72,133	0.14	0.07	0.0%	0.0%
2123	Nonmetallic Mineral Mining and Quarrying	200	218	2.2%	$73,869	$75,961	0.71	0.80	0.0%	0.0%
2131	Support Activities for Mining	393	377	-1.0%	$63,904	$72,090	0.58	0.48	0.0%	0.0%
2211	Electric Power Generation, Transmission, and Distribution	856	853	-0.1%	$137,465	$136,460	0.63	0.75	0.1%	0.1%
2212	Natural Gas Distribution	1,480	1,698	3.5%	$118,827	$125,572	0.77	0.83	0.2%	0.2%
2213	Water, Sewage, and Other Systems	199	223	2.8%	$52,130	$49,478	0.70	0.71	0.0%	0.0%
2371	Utility System Construction	2,038	2,421	4.4%	$73,414	$70,997	1.07	0.99	0.2%	0.2%
3241	Petroleum and Coal Products Manufacturing	50	72	9.9%	$113,626	$119,527	0.05	0.09	0.0%	0.0%
3251	Basic Chemical Manufacturing	70	151	21.1%	$80,601	$101,064	0.27	0.54	0.0%	0.0%
3353	Electrical Equipment Manufacturing	538	564	1.2%	$61,271	$60,437	1.04	1.22	0.1%	0.1%
4247	Petroleum and Petroleum Products Merchant Wholesalers	654	595	-2.3%	$62,242	$59,089	1.45	1.33	0.1%	0.1%
4543	Direct Selling Establishments	539	543	0.2%	$47,990	$43,971	0.92	1.07	0.1%	0.1%
4861 4862	Pipeline Transportation of Crude Oil and Natural Gas	897	1,111	5.5%	$100,961	$100,570	8.71	9.13	0.1%	0.1%
4869	Other Pipeline Transportation	35	32	-1.9%	$92,892	$99,920	0.50	0.53	0.0%	0.0%
ENERGY AND UTILITIES INDUSTRY CLUSTER SUMMARY		*8,026*	*8,900*	*2.6%*	*$87,738*	*$88,907*	*0.81*	*0.87*	*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.

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.