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ECONOMICS

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# **A Summary SocioEconomic Profile 3 County Aggregation**

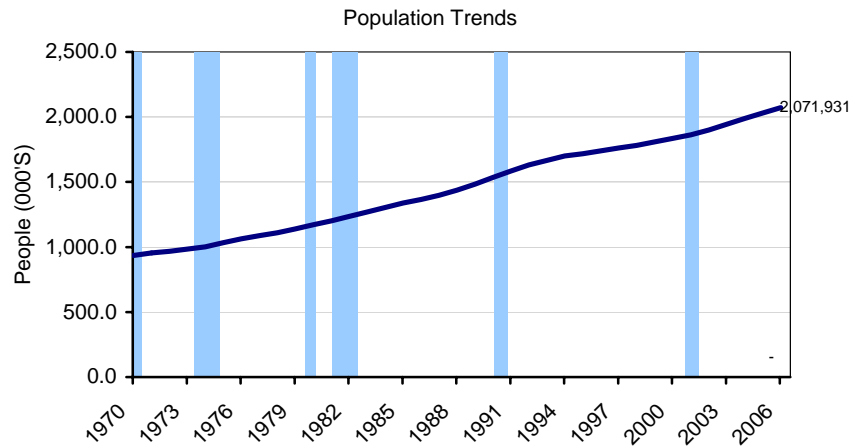
**Fresno CA, Kern CA, and Tulare CA**

Produced by the  
**Economic Profile System (EPS)**  
October 20, 2008

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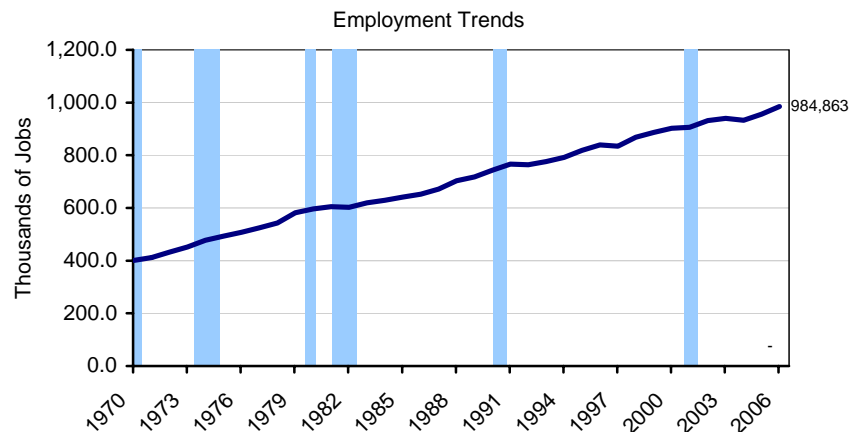
Population

- From 1970 to 2006 population grew by 1,136,986 people, a 122% increase in population.
- At an annual rate, this represents an increase of 2.2%.
- Over the last 36 years population growth in the 3 county aggregation has outpaced that of the California and the nation, 121.6% vs. 81.0% and 46.6% respectively.



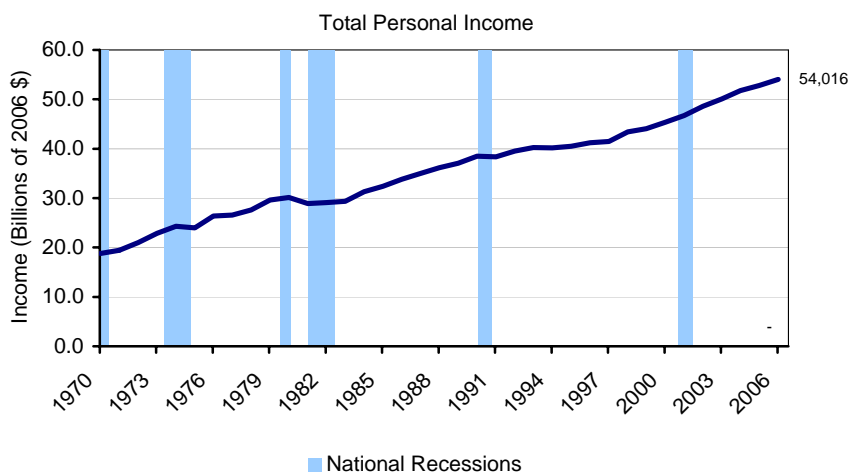
Employment

- From 1970 to 2006, 584,437 new jobs were created.
- At an annual rate, this represents an increase of 2.5%.
- Employment grew faster (2.5% per year) than population (2.2% per year).
- Over the last 36 years population growth in the 3 county aggregation has outpaced that of the state and the nation, 146.0% vs. 126.6% and 95.4% respectively.



Income

- From 1970 to 2006, personal income added \$35,232 million in real terms.
- The annualized growth rate was 3.0%.
- Income grew faster (3.0% per year adjusted for inflation) than employment (2.5% per year).
- Over the last 36 years income growth in the 3 county aggregation has outpaced that of the state and the nation, 187.6% vs. 187.0% and 153.6% respectively.



■ National Recessions

Source: BEA REIS 2006 Table CA25 and CA25N

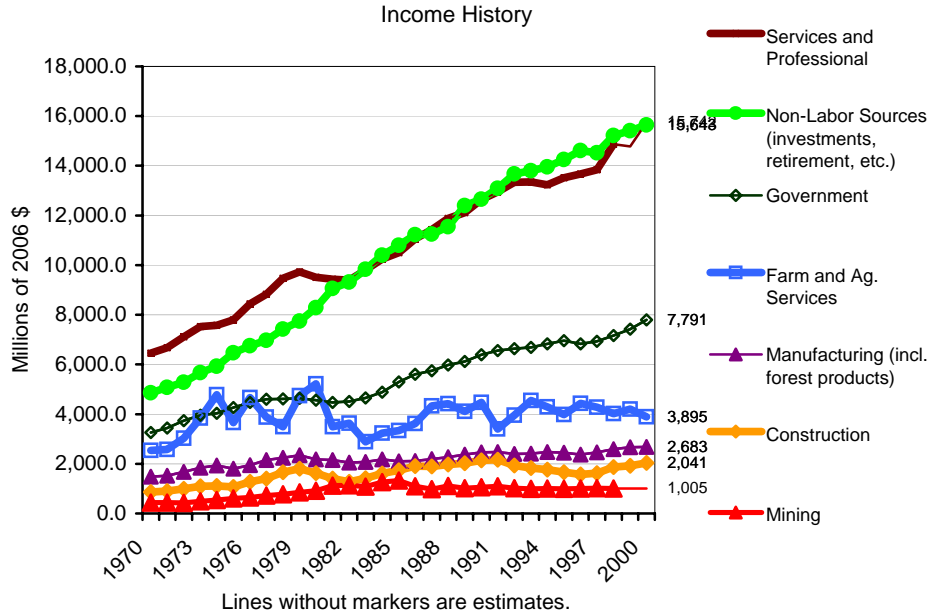
Data ends in 2000 because the BEA switched to a different classification system (NAICS) in 2001.

**Growth**

- The income category whose share of total gained the most was non-labor income, which went from 25.9% in 1970 to 34.5% in 2000.

**Decline**

- The category whose share of total shrank the most was farm, which went from 10.9% in 1970 to 4.2% in 2000.



Lines without markers are estimates.

**New Income by Type**

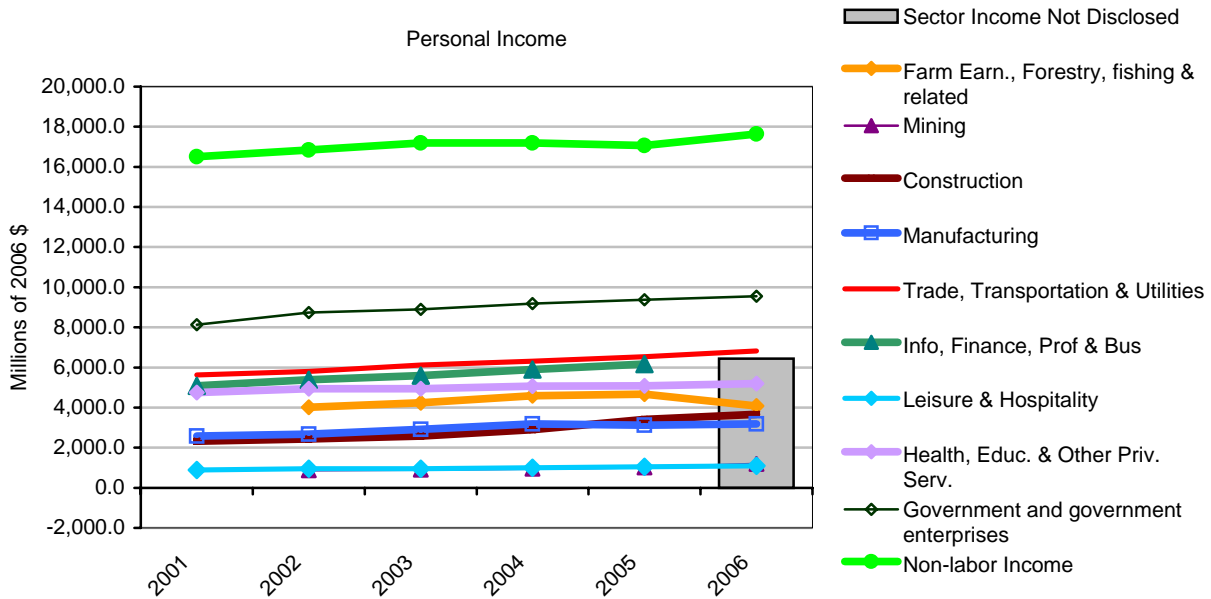
| All figures in millions of 2005 dollars | 1970     | % of Total | 2000     | % of Total | New Income 1970 to 2000 | % of New Income | Change in Share |
|---|----------|------------|----------|------------|-------------------------|-----------------|-----------------|
| Total Personal Income*                  | 18,783.5 |            | 45,351.6 |            | 26,568.0                |                 |                 |
| Farm and Agricultural Services          | 2,533.8  | 13.5%      | 3,895.4  | 8.6%       | 1,361.6                 | 5%              |                 |
| Farm                                    | 2,048.6  | 10.9%      | 1,893.0  | 4.2%       | (155.6)                 | NA              |                 |
| Ag. Services                            | 485.2    | 2.6%       | 2,002.4  | 4.4%       | 1,517.2                 | 6%              |                 |
| Mining                                  | 436.4    | 2.3%       | 1,005.5  | 2.2%       | 569.0                   | 2%              |                 |
| Manufacturing (incl. forest products)   | 1,478.7  | 7.9%       | 2,682.7  | 5.9%       | 1,204.0                 | 5%              |                 |
| Services and Professional               | 6,451.5  | 34.3%      | 15,742.3 | 34.7%      | 9,290.8                 | 35%             |                 |
| Transportation & Public Utilities       | 1,073.3  | 5.7%       | 2,148.0  | 4.7%       | 1,074.7                 | 4%              |                 |
| Wholesale Trade                         | 876.4    | 4.7%       | 1,581.5  | 3.5%       | 705.1                   | 3%              |                 |
| Retail Trade                            | 1,911.6  | 10.2%      | 3,150.0  | 6.9%       | 1,238.5                 | 5%              |                 |
| Finance, Insurance & Real Estate        | 543.8    | 2.9%       | 1,453.6  | 3.2%       | 909.7                   | 3%              |                 |
| Services (Health, Legal, Business, Oth. | 2,046.4  | 10.9%      | 7,409.1  | 16.3%      | 5,362.7                 | 20%             |                 |
| Construction                            | 861.3    | 4.6%       | 2,041.2  | 4.5%       | 1,179.9                 | 4%              |                 |
| Government                              | 3,266.2  | 17.4%      | 7,790.5  | 17.2%      | 4,524.4                 | 17%             |                 |
| Non-Labor Income                        | 4,862.5  | 25.9%      | 15,642.9 | 34.5%      | 10,780.4                | 41%             |                 |
| Dividends, Interest & Rent              | 2,362.6  | 12.6%      | 7,104.3  | 15.7%      | 4,741.7                 | 18%             |                 |
| Transfer Payments                       | 2,499.9  | 13.3%      | 8,538.6  | 18.8%      | 6,038.7                 | 23%             |                 |

\* Estimates for data that were not disclosed are bold and red in the above table.

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.

Source: BEA REIS 2006 CD Table CA05 (Data organized by Standard Industrial Classification System, SIC)

Personal Income by Sector in 2001 - 2006



Source: BEA REIS 2008. Table CA05N (data organized by NAICS).

Wages by Sector in 2006

- Of the major categories, the highest paying sector is Federal Government. It accounts for 3.3% of total employment and pays \$56,760 per year.
- Of the major categories, the largest employment sector is Natural Resources and Mining. It accounts for 17.5% of total employment and pays \$23,315 per year.
- Wages in the public sector (\$44,230) exceeded wages in the private sector (\$31,172) by 41.9%.
- Note that these data do not include proprietors or the value of benefits.

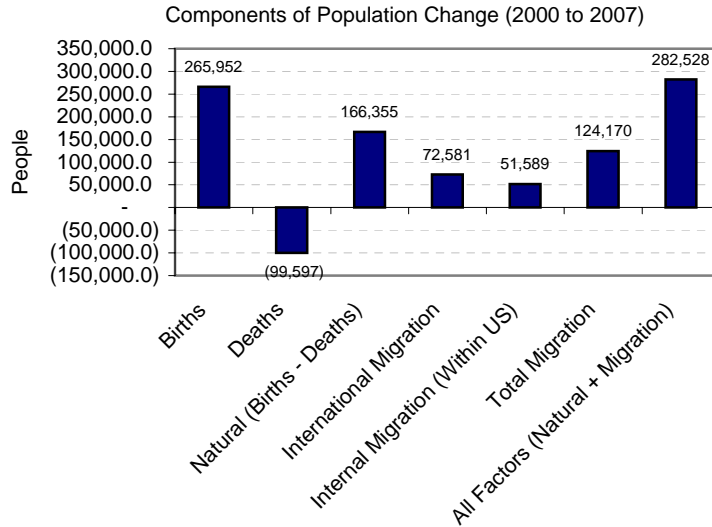
| County Wages and Employment in 2006      |            |            |                      |
|--|------------|------------|----------------------|
|  | Employment | % of Total | Average Annual Wages |
| <b>Total Private &amp; Public</b>        | 773,179    | 100%       | 33,693               |
| <b>Total Private</b>                     | 623,898    | 81%        | 31,172               |
| Natural Resources and Mining             | 135,053    | 17%        | 23,315               |
| Agriculture, forestry, fishing & hunting | 125,516    | 16%        | 19,325               |
| Mining                                   | 9,538      | 1%         | 75,820               |
| Construction                             | 51,325     | 7%         | 40,618               |
| Manufacturing (Incl. Forest Products)    | 52,115     | 7%         | 39,780               |
| Trade, Transportation, and Utilities     | 128,182    | 17%        | 32,464               |
| Information                              | 8,194      | 1%         | 50,193               |
| Financial Activities                     | 29,017     | 4%         | 44,206               |
| Professional and Business Services       | 65,715     | 8%         | 34,274               |
| Education and Health Services            | 68,141     | 9%         | 38,837               |
| Leisure and Hospitality                  | 56,845     | 7%         | 13,642               |
| Other Services                           | 29,294     | 4%         | 21,083               |
| Unclassified                             | 18         | 0%         | 21,615               |
| <b>Total Public</b>                      | 149,279    | 19%        | 44,230               |
| Federal Government                       | 20,323     | 3%         | 56,760               |
| State Government                         | 17,977     | 2%         | 47,426               |
| Local Government                         | 110,979    | 14%        | 41,418               |

Wages are shaded in green when they are more than 20% higher than the wages for all sectors and in red when they are less than 20% lower.

Source: Bureau of Labor Statistics Quarterly Census of Employment and Wages (QCEW)

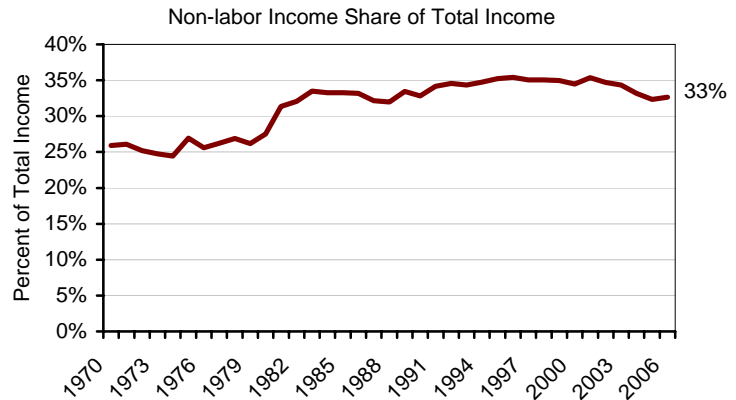
## Components of Population Changes

- From 2000 to 2007, population increased by 282,528 people.
- 43.9% of the increase was due to migration. 124,170 people migrated into the county.
- Of these, 72,581 migrated from other countries.
- 58.9% of the change in population was due to natural causes. Births exceeded deaths by 166,355 people.



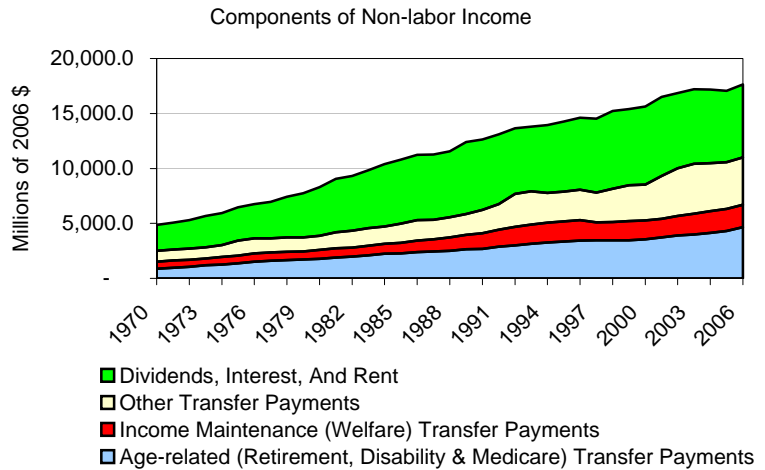
## Non-labor Income

- In the last 36 years, non-labor sources grew at an annual rate of 3.6%, outpacing labor sources which grew at a 2.7% rate.
- 32.6% of total personal income in 2006 was from non-labor sources.
- 36.2% of new income from 1970 to 2005 was from non-labor sources.



## Components of Non-labor Income

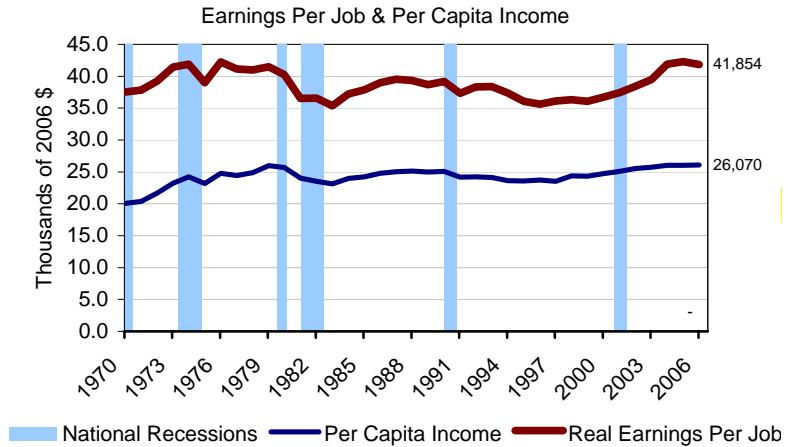
- The largest components of Non-Labor Income are from Dividends, Interest & Rent (i.e., money earned from past investments).
- In 2006 welfare represented 18.5% of transfer payments, and 3.8% of total personal income. This is down from 1970 and down from 1980.
- In 2006, 42% of Transfer Payments were from age-related sources (retirement, disability, insurance payments, and Medicare), while 18.5% was from welfare.



Source: US Census and BEA REIS 2006 Table CA30 and CA45.

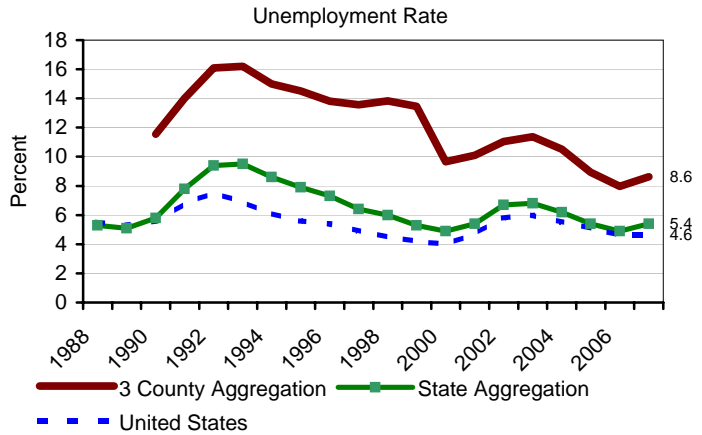
## Earnings and Per Capita Income

- In 2006, average earnings (\$41,854) exceeded per capita income (\$26,070) by \$15,783. This can be caused by retirees having less income than workers, a relatively small portion of the workforce working part-time, and/or a relatively large portion of the population who is out of the workforce.
- In 2006, average earnings per job (\$41,854) were lower than the state (\$54,286) and the nation (\$47,286).
- In 2006, per capita income (\$26,070) was lower than the state (\$39,626) and the nation (\$36,714).
- From 1970 to 2006, per capita income grew faster (0.7% per year adjusted for inflation) than average earnings per job (0.3% per year adjusted for inflation).



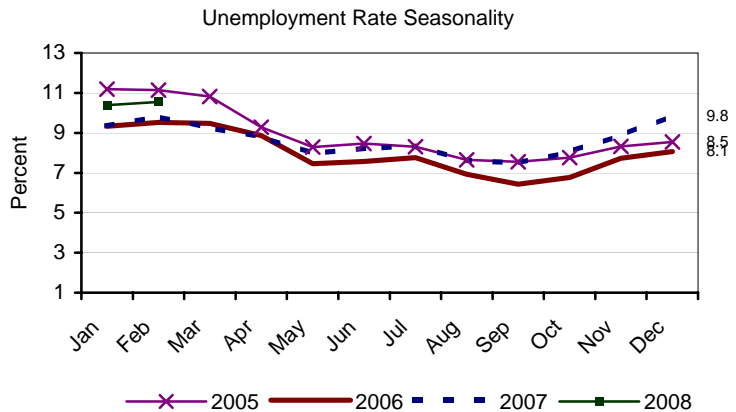
## Unemployment Rate

- In 2007, the unemployment rate was 8.6%, compared to 5.4% in the state and 4.6% in the nation.
- Since 1990, the unemployment rate varied from from a low of 8.0% in 2006 to a high of 16.2% in 1993



## Unemployment Rate Seasonality

- This graph illustrates the seasonal variation in the unemployment rate over the last three years. In 2007, the unemployment rate varied from from a low of 7.5% in September 2007 to a high of 9.8% in December 2007.



Source: Bureau of Labor Statistics

### 3 County Aggregation

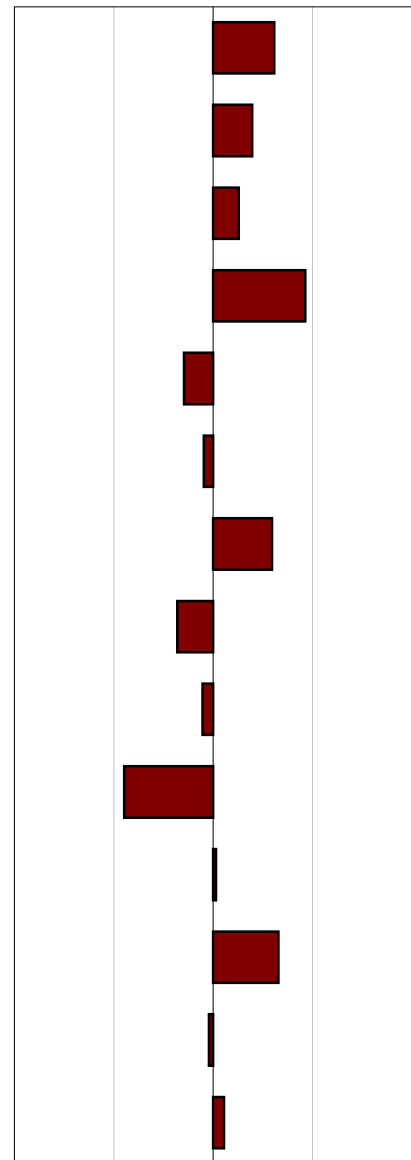
## Performance Comparisons

Benchmark = Median of all Counties in U.S.\*\*\*

Compared to benchmark area, the county has:

← Less Than | More Than →

|                               | 3 County Aggregation  | US Median |           |
|-------------------------------|---|-----------|-----------|
| <b>Growth</b>                 | <b>Population Growth (Annualized rate, 1970-2006)</b>   | 2.2%      | 0.6%      |
|                               | <b>Employment Growth (Annualized rate, 1970-2006)</b>   | 2.5%      | 1.4%      |
|                               | <b>Personal Income Growth (Adjusted for Inflation, Annualized rate, 1970-2006)</b>                            | 3.0%      | 2.2%      |
| <b>Personal Prosperity</b>    | <b>Unemployment Rate in 2007**</b>  | 8.6%      | 4.7%      |
|                               | <b>Non-labor Income Share of Total in 2006</b>  | 32.6%     | 37.4%     |
|                               | <b>Per Capita Income (2006)</b>   | \$ 26,070 | \$ 27,413 |
|                               | <b>Average Earnings Per Job (2006)</b>  | \$ 41,854 | \$ 30,604 |
|                               | <b>Housing Affordability in 2000</b> (100 or above means that the median family can afford the median house)* | 139       | 186       |
|                               | <b>Rich-Poor Ratio*</b> (for each household that made over \$100K, how many households made less than \$30K)  | 5.2       | 8.7       |
| <b>Competitive Advantages</b> | <b>Median Age*</b>  | 30        | 37.3      |
|                               | <b>Education Rate*</b> (% of population 25 and over who have a college degree)                                | 14.9%     | 14.5%     |
|                               | <b>Education Rate*</b> (% of population 25 and over who have less than a high school diploma)                 | 33.3%     | 21.0%     |
|                               | <b>Employment Specialization*</b> (Higher scores are more specialized.)****                                   | 132       | 155       |
|                               | <b>Government share of Total employment in 2006</b>   | 16%       | 15%       |



(4.00) (2.00) - 2.00 4.00  
# of Standard Deviations from the Median

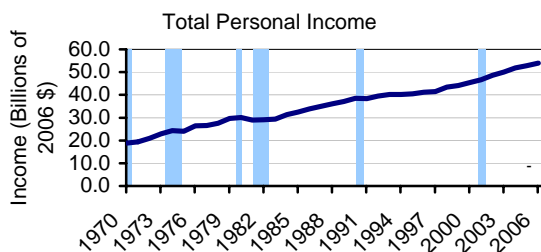
All data are from REIS except \* are from 2000 US Census and \*\* is from Bureau of Labor Statistics.

\*\*\*Median is the middle value of a list of numbers. This is different from mean (average), which is the sum of all the numbers in a list divided by the number of numbers in the list.

\*\*\*\* 3 County Aggregation is roughly average, with a specialization score of 132. By comparison, a county that is structured identically to the US would have a score of 0 (very diverse). The largest observed score in the U.S. is 3,441 (very specialized).

#### Growth

- From 1970 to 2006 population grew by 1,136,986 people, a 122% increase in population. At an annual rate, this represents an increase of 2.2%.
- From 1970 to 2006, 584,437 new jobs were created. Employment grew faster (2.5% per year) than population (2.2% per year).
- From 1970 to 2006, personal income added \$35,232 million in real terms. Income grew faster (3.0% per year adjusted for inflation) than employment (2.5% per year).
- From 2000 to 2007, population increased by 282,528 people. 43.9% of the increase was due to migration. 124,170 people migrated into the county. Of these, 72,581 migrated from other countries. 58.9% of the change in population was due to natural causes. Births exceeded deaths by 166,355 people.



#### Personal Prosperity

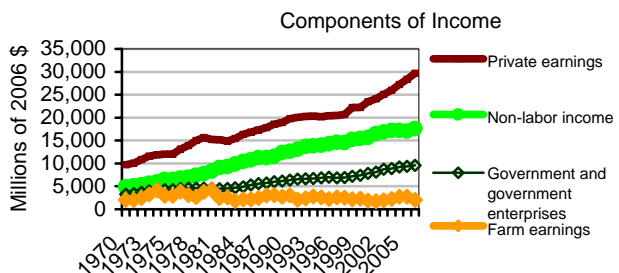
- Average earnings per job, adjusted for inflation, have risen from \$37,530 in 1970 to \$41,854 in 2006.
- In 2006, Average earnings per job in 3 County Aggregation (\$41,854) were lower than the state (\$54,828) and the nation (\$47,286).
- Per capita income, adjusted for inflation, has risen from \$20,091 in 1970 to \$26,070 in 2006.
- In 2006, per capita income in 3 County Aggregation (\$26,070) was lower than the state (\$39,626) and the nation (\$36,714).
- Unemployment has declined steadily, but remains seasonal.
- Housing Affordability in 2000 (100 or above means that the median family can afford the median house)\* was somewhat less affordable (139).

#### Competitive Advantages

- Education Rate (% of population 25 and over who have a college degree) was roughly average (14.9%).
- Education Rate (% of population 25 and over who have less than a high school diploma) was high (33.3%).
- Rich-Poor Ratio (for each household that made over \$100K, how many households made less than \$30K) was roughly average (5.2).

#### Sector Analysis - Sources of Income

- The income category whose share of total gained the most was non-labor income, which went from 25.9% in 1970 to 34.5% in 2000.
- The category whose share of total shrank the most was farm, which went from 10.9% in 1970 to 4.2% in 2000.
- Non-labor Income Share of Total in 2006 was somewhat low (32.6% compared to 37.4% in the median US County).
- The largest components of Non-Labor Income are from Dividends, Interest & Rent (i.e., money earned from past investments).
- In 2006 welfare represented 18.5% of transfer payments, and 3.8% of total personal income. This is down from 1970 and down from 1980.
- In 2006, 42% of Transfer Payments were from age-related sources (retirement, disability, insurance payments, and Medicare), while 18.5% was from welfare.
- Of the major categories, the highest paying sector is Federal Government. It accounts for 3.3% of total employment and pays \$56,760 per year.
- In 2005, the three highest paying sectors were Federal Government, Information, and State Government.
- Of the major categories, the largest employment sector is Natural Resources And Mining. It accounts for 17.5% of total employment and pays \$23,315 per year.
- Wages in the public sector (\$44,230) exceeded wages in the private sector (\$31,172) by 41.9%.
- Government share of Total employment was roughly average (16.2%).



- Employment Specialization was roughly average (132). The sectors that most diverge from the US norm are (based on US Census 2000 Employment):
- Over reliance on Agriculture, forestry, fishing and hunting (9.7% compared to 1.5% in the US)
- Under reliance on Manufacturing (7.7% compared to 14.1% in the US)
- Under reliance on Professional, scientific, and technical services (3.4% compared to 5.9% in the US)
- Over reliance on Public administration (7.1% compared to 4.8% in the US)



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# **Major Sectors Related to Public Lands in 3 County Study Area**

**Tulare California, Kern California, and Fresno California**

Produced by the  
**Economic Profile System Analyst (EPSA)**

October 10, 2008

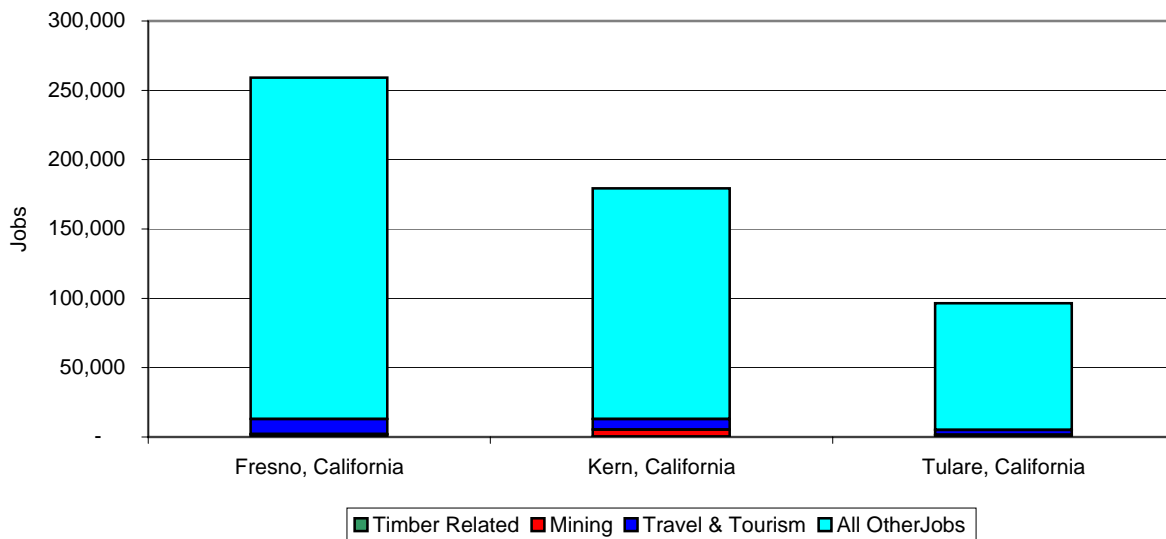
Jobs in 2006

|                  | United States | California | Study Area | Fresno, California | Kern, California | Tulare, California |
|------------------|---------------|------------|------------|--------------------|------------------|--------------------|
| Timber Related   | 1,124,528     | 70,790     | 3,271      | 1,569              | 235              | 1,467              |
| Mining           | 554,333       | 21,285     | 5,715      | 535                | 5,083            | 97                 |
| Travel & Tourism | 5,039,330     | 697,197    | 21,927     | 10,780             | 7,581            | 3,566              |
| All OtherJobs    | 113,904,061   | 13,101,501 | 503,905    | 246,249            | 166,384          | 91,272             |

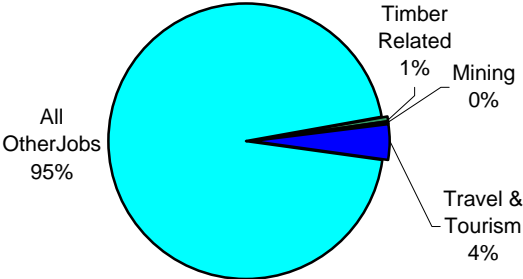
Job Trends in Major Sectors Related to Public Lands



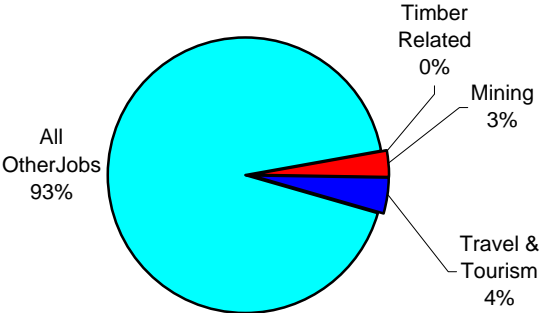
Job in Major Sectors Related to Public Lands



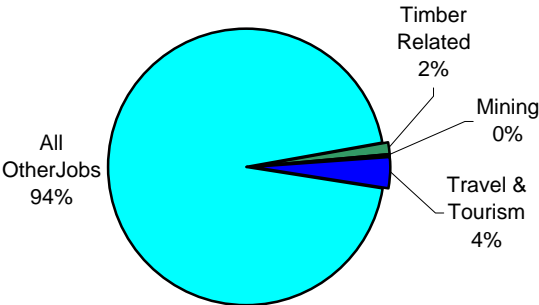
Fresno, California



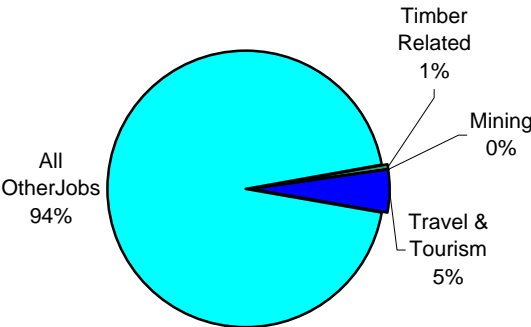
Kern, California



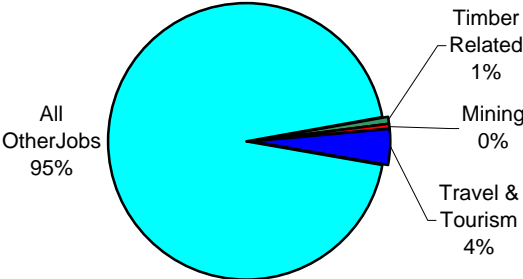
Tulare, California



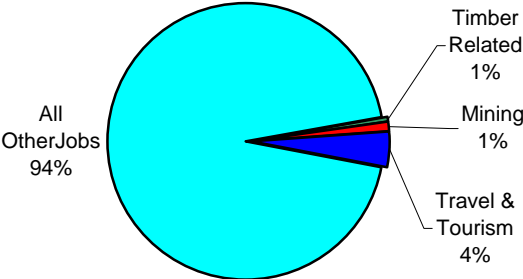
California



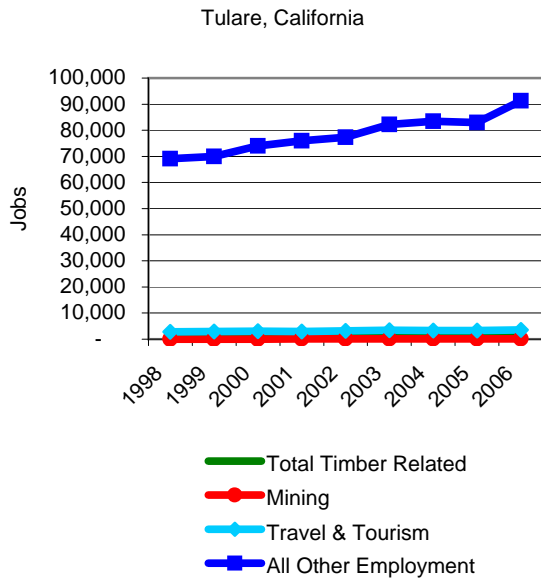
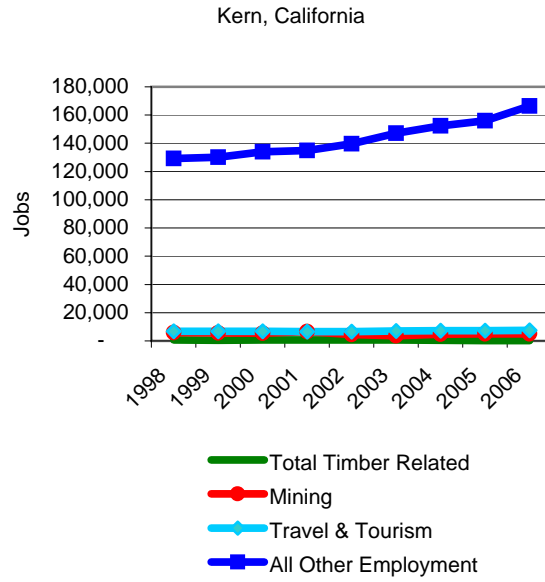
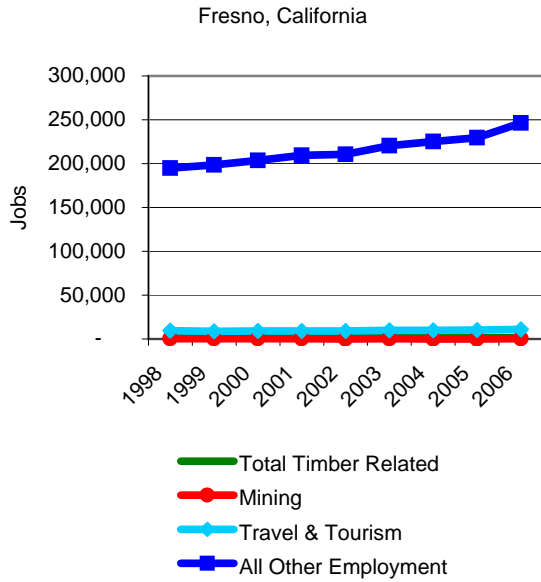
United States



Study Area



Major Private Job Sector Trends in Each County

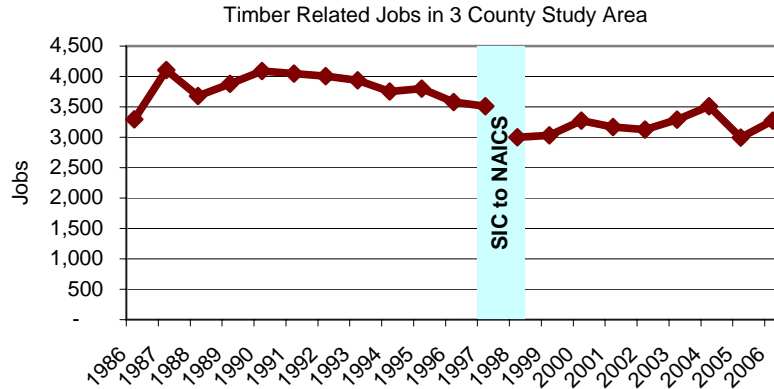


Sources: CBP 2008, with estimates by Headwaters Economics.

## Timber Related Jobs Over Time

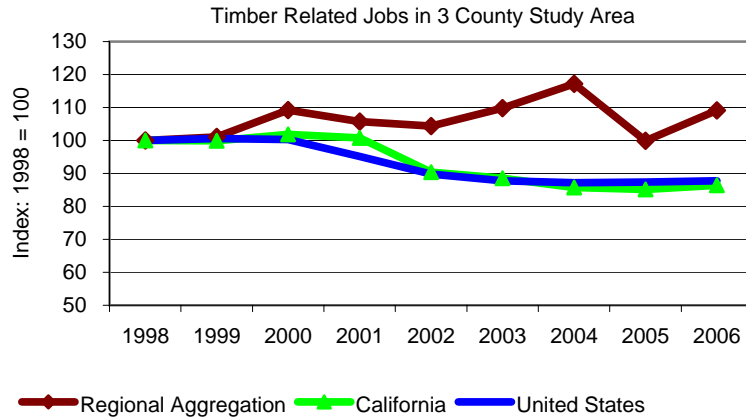
### Timber Related Jobs

- In 2006, the 3 county region employed 3,271 people in the timber industry or 0.6% of total jobs.
- By comparison, timber related jobs in the US accounted for 0.9% of the national economy.



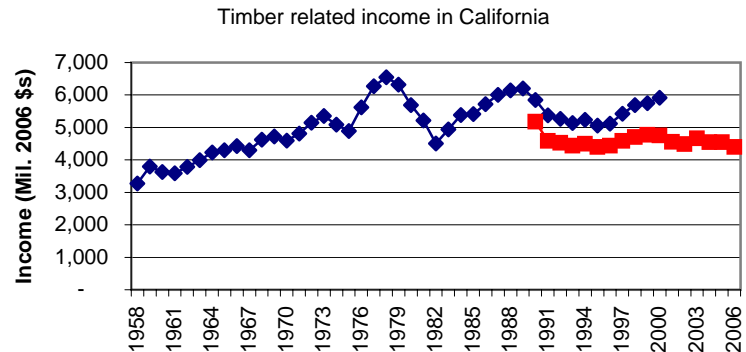
### Timber Related Jobs Relative to the State (Indexed)

- Over the last 8 years timber employment in the region has grown by 9.1%, which is faster than the state and faster than the nation.
- Data is indexed by dividing by the value in 1998 times 100. A value of 100 indicates that it has not changed since 1998.



### Long-term State Trends in Timber Related Personal Income

- This chart provides a longer term perspective at the state level. Note that unlike the other charts, these data includes the self-employed and includes more recent history.
- The BEA provides data for both SIC and NAICS from 1990 to 2000, allowing us to see the effect of the change in classification methods.



Note: In 1998, the Census changed how it classified sectors to the data before 1998 is not strictly comparable.

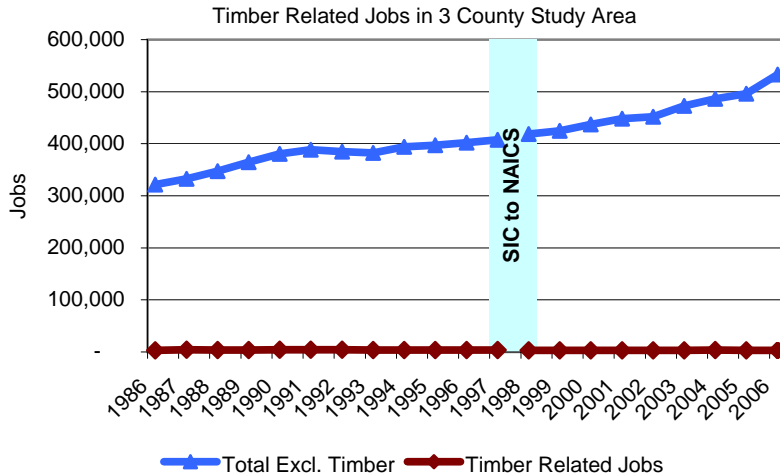
Source: BEA SPI 2007 and CBP 2006.

What portion of the economy is directly related to timber jobs?

Timber Jobs in Relation to Total

It is important to put the scale of these sectors into perspective based on the total size of the economy. This chart is the same as on the previous page, but it includes total employment (not including proprietors and government).

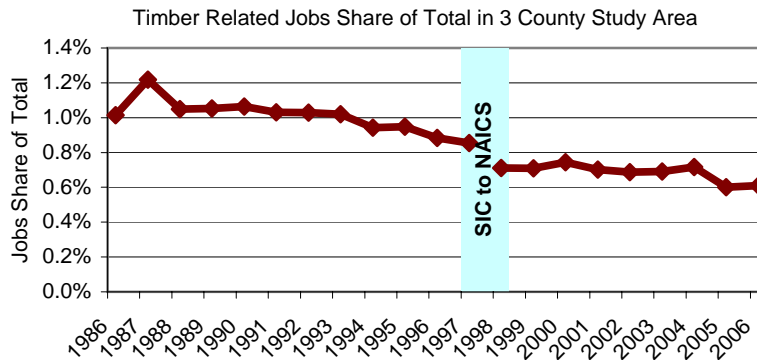
- From 1986 to 1997, when the data used the SIC method, timber related jobs grew by 216 while all private jobs excluding timber grew by 85,873.
- From 1989 to 2006, when the data used the NAICS method, timber related jobs grew by 273 while all private jobs excluding timber grew by 114,528.



Share of Total

These charts track the size of the timber related jobs as a share of the total private employment in the region.

- Since 1986, the share of timber related jobs varied from a low of 0.6% in 2005 to a high of 1.2% in 1987
- In the latest year (2006), timber related jobs accounted for 0.6% of the total private economy.

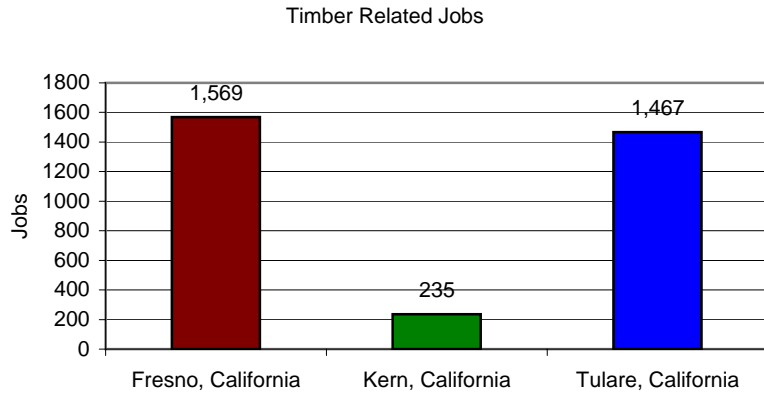


Note that these charts are using County Business Patterns data that does not include proprietors or government employment. Sources: BEA REIS 2008, CBP 2008

Where are the timber jobs? Are they spread evenly across the region?

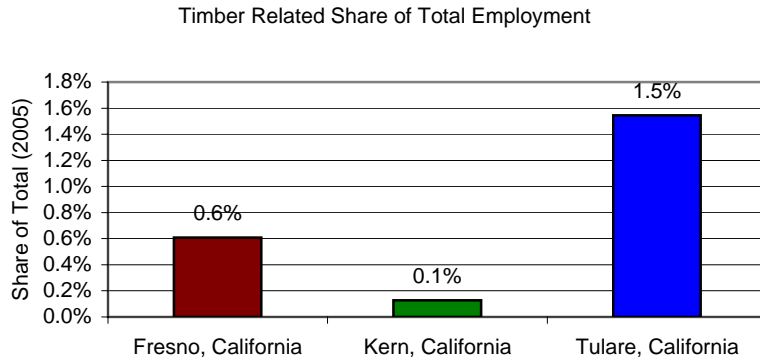
Jobs

- Within the region, Fresno, California employs the most workers in Total Timber Related (1,569). The least are employed in Kern, California (235). Together, the region employs 4.6% of the state's total timber related jobs.



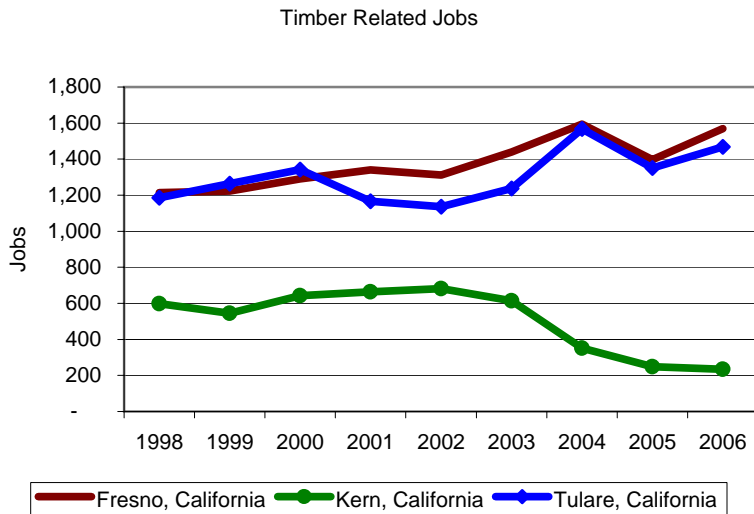
Share of Total

- Within the region, Tulare, California employees the greatest share of workers in Total Timber Related (1.5%). The least are employed in Kern, California (0.1%). Together, the region's share is 0.6%, roughly the same as the state's share of total (0.5%).



Growth Comparisons

- From 1998 to 2006, 2 counties gained Timber jobs (Fresno, California, Tulare, California).
- From 1998 to 2006, 1 county lost Timber jobs (Kern, California).
- From 1998 to 2006, Fresno, California gained the most Timber jobs (355).
- From 1998 to 2006, Kern, California lost the most Timber jobs (-363).



Sources: CBP 2008, with estimates by Headwaters Economics.

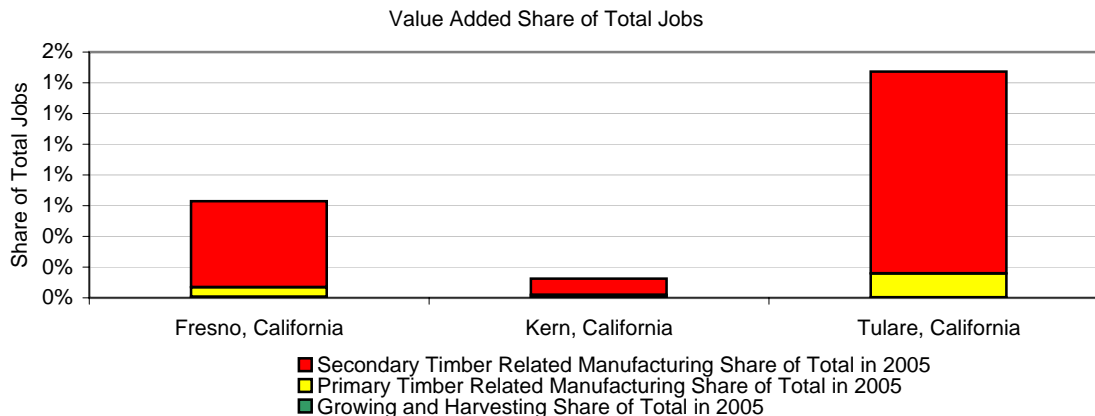
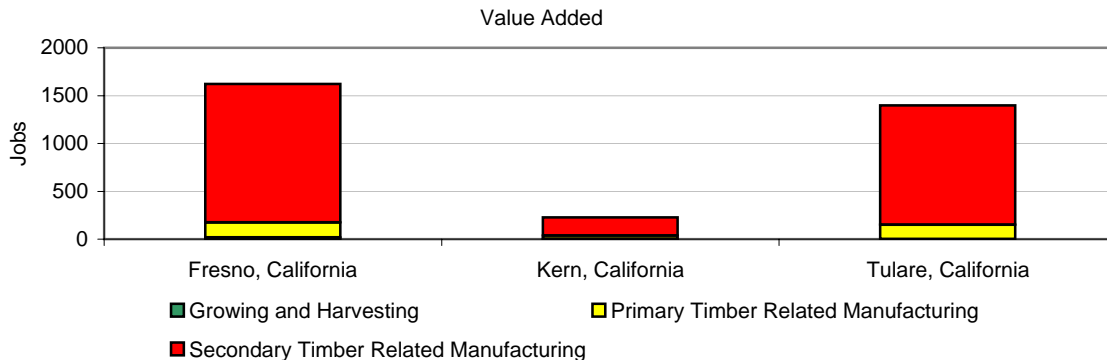
**How well is the region capturing the maximum value from the timber?**

In order to track how well the region has been able to capture the maximum value from the harvested timber, this report breaks timber related employment into three categories. 1) "**Growing and Harvesting**" are jobs directly related to logging and forestry. These jobs typically are in the forest. 2) "**Primary manufacturing**" includes the manufacturing that generally takes raw logs and does the first stage of processing (e.g. sawmills and paper mills). 3) "**Secondary manufacturing**" includes manufacturing that generally takes the output from the primary manufacturing and produces finished products. These jobs tend to yield the most income per log and are often located far from the source of the logs. For more information about how these sector breakouts are defined, see the detailed table at the end of this profile or the appendix.

| Component of Timber Industry    | Fresno, California Kern, California |      | Tulare, California | California | United States |
|---------------------------------|-------------------------------------|------|--------------------|------------|---------------|
|                                 |                                     |      |                    |            |               |
| Direct (Growing and Harvesting) | 18                                  | 5    | 1                  | 2,740      | 79,795        |
| Primary Manufacturing           | 157                                 | 32   | 149                | 8,345      | 257,239       |
| Secondary Manufacturing         | 1,448                               | 191  | 1,249              | 59,705     | 787,494       |
| Total Timber Related Jobs       | 1,569                               | 235  | 1,467              | 70,790     | 1,124,528     |
| Valued Added Ratios             |                                     |      |                    |            |               |
| (Primary + Secondary / Direct)  | 90.2                                | 48.6 | 1,067.2            | 24.8       | 13.1          |
| (Primary / Direct)              | 8.8                                 | 6.9  | 113.9              | 3.0        | 3.2           |

The value added ratio ranges from 48.6 in Kern, California to 1067.2 in Tulare, California. By Comparison, the ratio is 24.8 in California and 13.1 in the United States. Where this ratio is low, there may be opportunities for more value added manufacturing.

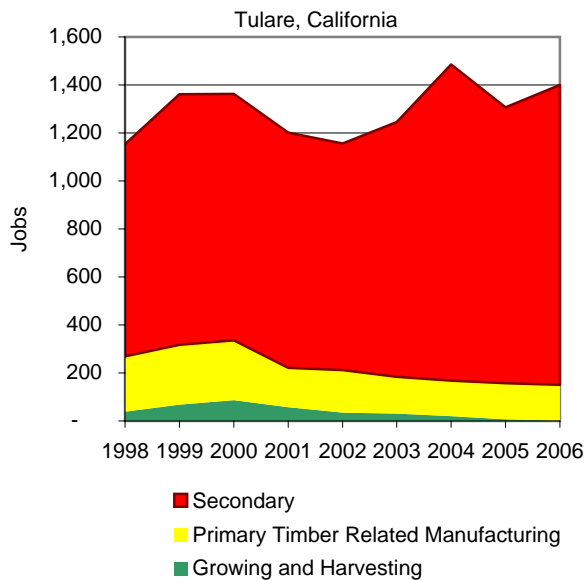
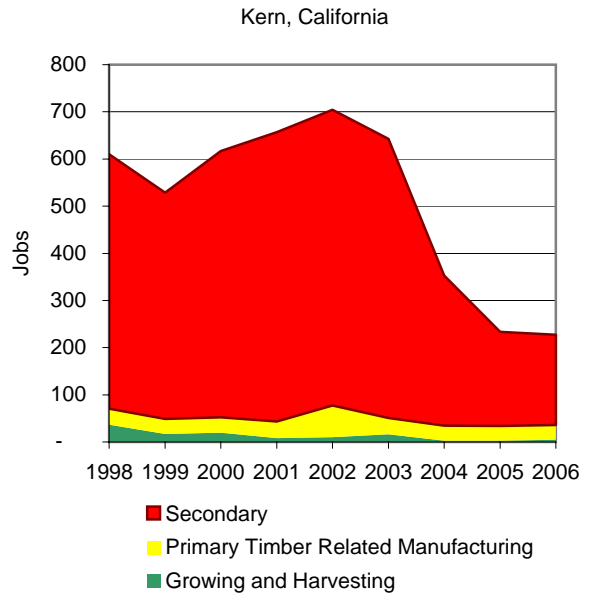
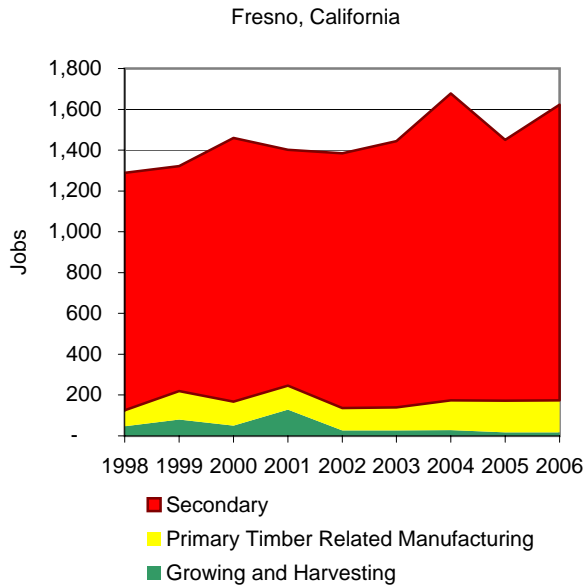
Communities that are maximizing the value of the timber output will have a lot of primary (in yellow) and secondary (in red) employment.



Source: Census County Business Patterns 2006 with Estimates by Headwaters Economics

Timber Jobs by Stage of Processing Over Time

Lines are stacked to sum to total timber related jobs.



Sources: CBP 2008, with estimates by Headwaters Economics.

### **Tulare, California**

Total timber jobs in Tulare, California were high (1.7 standard deviations from the median). 1467 people were employed which accounts for 1.0% of the economy. Nationwide, its share had a rank of 183 which puts it in the top 6.0% of all counties. The largest number of jobs were in secondary timber related employment (1249 jobs or 100.0% of timber related employment in the county).

### **Kern, California**

Total timber jobs in Kern, California were roughly average (0.2 standard deviations from the median). 235 people were employed which accounts for 0.1% of the economy. Nationwide, its share had a rank of 1057 which puts it in the top 34.0% of all counties. The largest number of jobs were in secondary timber related employment (191 jobs or 100.0% of timber related employment in the county).

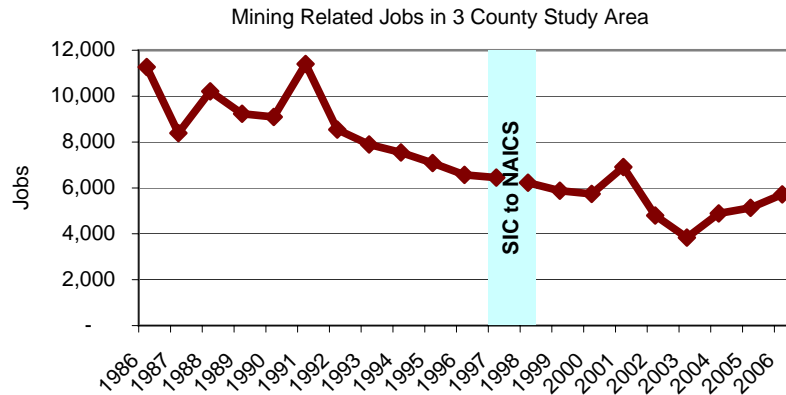
### **Fresno, California**

Total timber jobs in Fresno, California were high (1.9 standard deviations from the median). 1569 people were employed which accounts for 0.6% of the economy. Nationwide, its share had a rank of 161 which puts it in the top 6.0% of all counties. The largest number of jobs were in secondary timber related employment (1448 jobs or 100.0% of timber related employment in the county).

## Mining Related Jobs Over Time

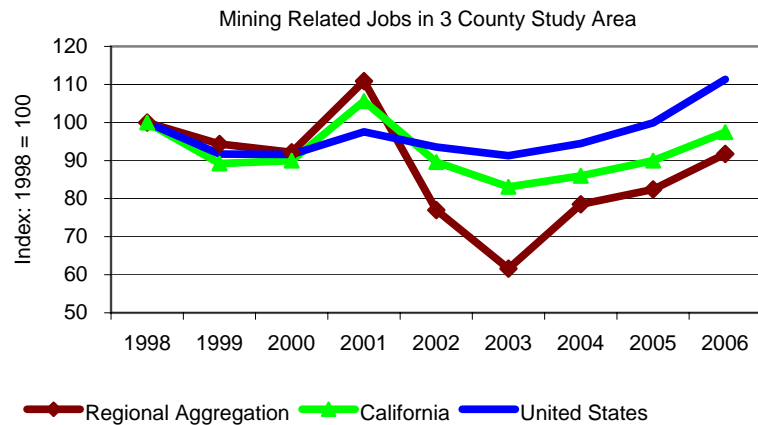
### Mining Related Jobs

- According to the County Business Patterns, in 2006, the 3 county region employed 5,715 people in the Mining industry or 1.1% of total jobs.
- By comparison, Mining related jobs in the US accounted for 0.5% of the national economy (excludes proprietors and government).



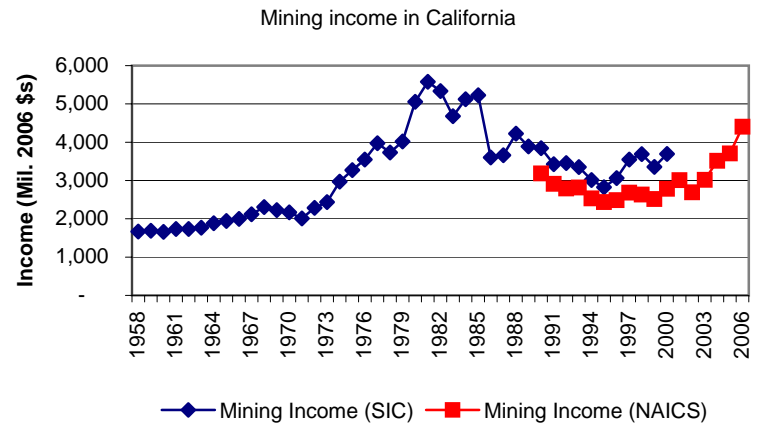
### Mining Related Jobs Relative to the State (Indexed)

- Over the last 8 years Mining employment in the region has declined by 8.2%, which is a larger decline than in the the state and which compares to increase of 11.3% in the nation.
- Data is indexed by dividing by the value in 1998 times 100. A value of 100 indicates that it has not changed since 1998.



### Long-term State Trends in Mining Related Personal Income

- This chart provides a longer term perspective at the state level. Note that unlike the other charts, these data includes the self-employed and includes more recent history.
- The BEA provides data for both SIC and NAICS from 1990 to 2000, allowing us to see the effect of the change in classification methods.



Note: In 1998, the Census changed how it classified sectors to the data before 1998 is not strictly comparable.

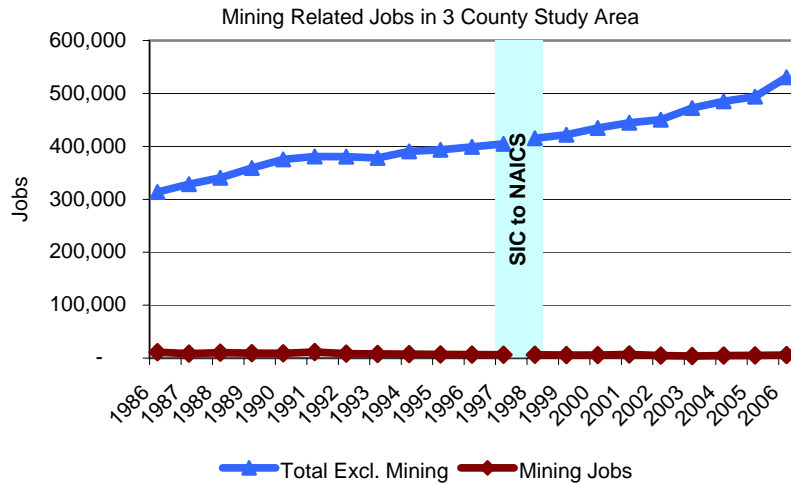
Source: BEA SPI 2007 and CBP 2006.

What portion of the economy is directly related to Mining related jobs?

Mining Jobs in Relation to Total

It is important to put the scale of these sectors into perspective based on the total size of the economy. This chart is the same as on the previous page, but it includes total employment (not including proprietors and government).

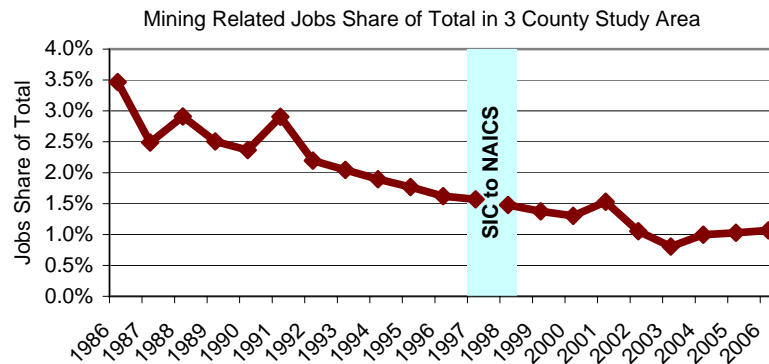
- From 1986 to 1997, when the data used the SIC method, Mining related jobs shrank by 4,821 while all private jobs excluding Mining grew by 90,910.
- From 1989 to 2006, when the data used the NAICS method, Mining related jobs shrank by 513 while all private jobs excluding Mining grew by 115,314.



Share of Total

These charts track the size of the Mining related jobs as a share of the total private employment in the region.

- Since 1986, the share of Mining related jobs varied from a low of 0.8% in 2003 to a high of 3.5% in 1986
- In the latest year (2006), Mining related jobs accounted for 1.1% of the total private economy.

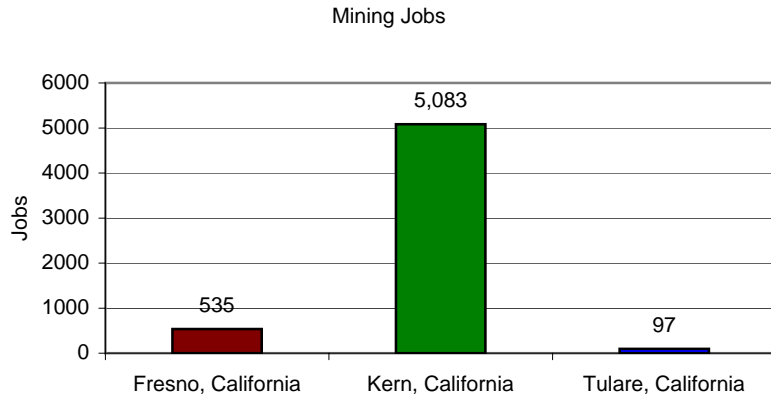


Note that these charts are using County Business Patterns data that does not include proprietors or government employment. Sources: BEA REIS 2008, CBP 2008

Where are the Mining jobs? Are they spread evenly across the region?

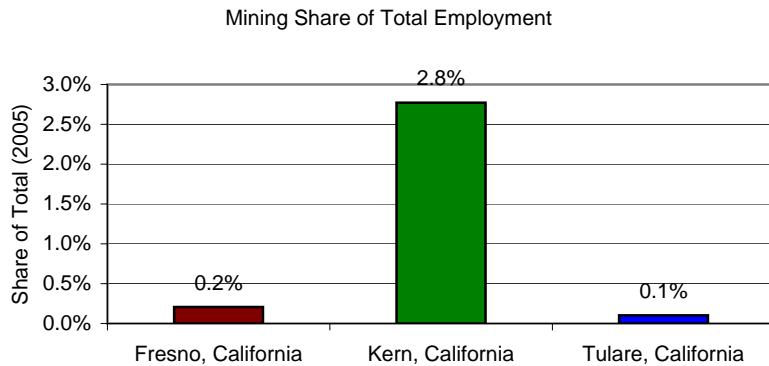
Jobs

- Within the region, Kern, California employs the most workers in Mining (5,083). The least are employed in Tulare, California (97). Together, the region employs 26.9% of the state in Mining.



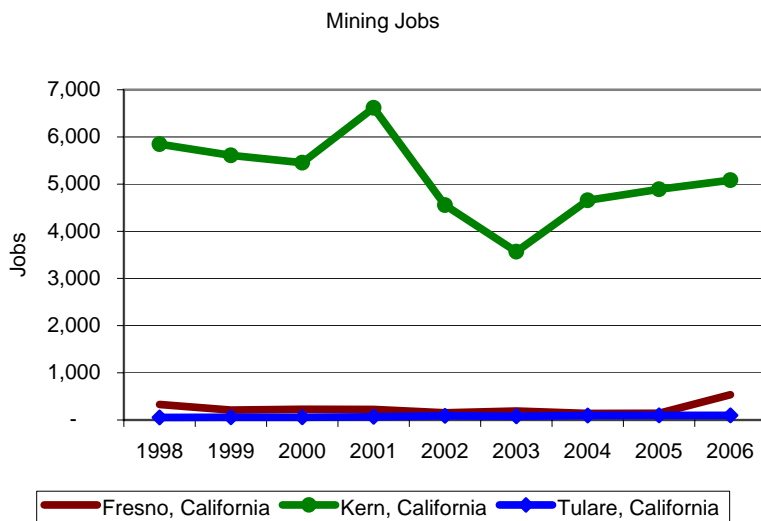
Share of Total

- Within the region, Kern, California employees the greatest share of workers in Mining (2.8%). The least are employed in Tulare, California (0.1%). Together, the region's share is 1.1%, 0.9% higher than the state's share of total (0.2%).



Growth Comparisons

- From 1998 to 2006, 2 counties gained Mining related jobs (Fresno, California, Tulare, California).
- From 1998 to 2006, 1 county lost Mining related jobs (Kern, California).
- From 1998 to 2006, Fresno, California gained the most Mining related jobs (208).
- From 1998 to 2006, Kern, California lost the most Mining related jobs (-764).

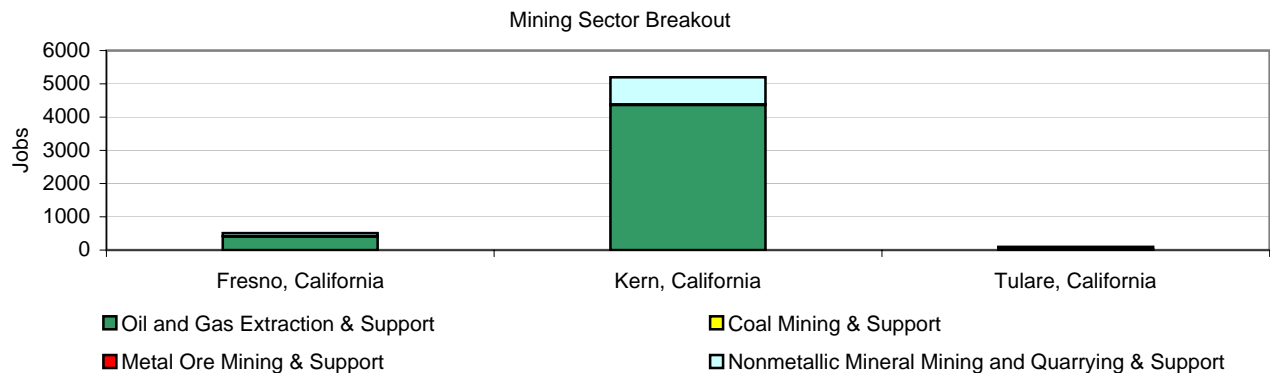


Sources: CBP 2008, with estimates by Headwaters Economics.

Sector Breakout

- In the 3 county region, energy jobs contributed 1.720% of total jobs in the region.
- Within the energy sector, oil and gas extraction & support jobs contributed 1.720% of total jobs in the region.
- Within the energy sector, coal mining & support jobs contributed 0.000% of total jobs in the region.
- Outside of the energy sector, metal ore mining & support jobs contributed 0.005% of total jobs in the region.
- Outside of the energy sector, nonmetallic mineral mining and quarrying & support jobs contributed 0.359% of total jobs in the region.

| Component of the Mining Industry                           | NAICS  | United States | California | Fresno, California | Kern, California | Tulare, California |
|--|--------|---------------|------------|--------------------|------------------|--------------------|
| Oil and Gas Extraction                                     | 211/// | 92,683        | 3,867      | 2                  | 1,072            | 7 A                |
| Drilling Oil and Gas Wells                                 | 1      | 85,296        | 2,295      | 30 B               | 854 F            | 8 A                |
| Support Activities for Oil and Gas Operations              | 2      | 155,404       | 8,145      | 379 B              | 2,437            | -                  |
| Oil and Gas Extraction & Support                           |        | 333,383       | 14,307     | 411 *              | 4,363 *          | 14 *               |
| Share of Total   |        | 0.278%        | 0.103%     | 0.159%             | 2.379%           | 0.015%             |
| Coal Mining  | 2121// | 77,939        | 7 A        | -                  | -                | -                  |
| Support Activities for Coal Mining                         | 3      | 7,954         | 3 A        | -                  | - A              | -                  |
| Coal Mining & Support                                      |        | 85,893        | 10 *       | -                  | - *              | -                  |
| Share of Total   |        | 0.072%        | 0.000%     | 0.000%             | 0.000%           | 0.000%             |
| Subtotal: Energy & Support                                 |        | 419,276       | 14,317     | 411                | 4,363            | 14                 |
| Metal Ore Mining   | 2122// | 27,687        | 158 E      | 2                  | 14 A             | -                  |
| Support Activities for Metal Mining                        | 4      | 2,971         | 110        | -                  | -                | -                  |
| Metal Ore Mining & Support                                 |        | 30,658        | 268 *      | 2                  | 14 *             | -                  |
| Share of Total   |        | 0.026%        | 0.002%     | 0.001%             | 0.007%           | 0.000%             |
| Nonmetallic Mineral Mining and Quarrying                   | 2123// | 99,723        | 6,657      | 96 B               | 818 F            | 84                 |
| Support Activities for Nonmetallic Minerals (except Fuels) | 5      | 4,676         | 54 B       | -                  | 2 A              | -                  |
| Nonmetallic Mineral Mining and Quarrying & Support         |        | 104,399       | 6,711 *    | 96 *               | 819 *            | 84                 |
| Share of Total   |        | 0.087%        | 0.049%     | 0.037%             | 0.447%           | 0.088%             |
| All Mining   | 21---- | 554,333       | 21,285     | 535                | 5,083            | 97                 |
| Mining Share of Total                                      |        | 0.462%        | 0.154%     | 0.208%             | 2.771%           | 0.102%             |
| Total (All Sectors)  | -----  | 119,917,000   | 13,834,300 | 257,975            | 183,412          | 94,949             |



#### **Kern, California**

Mining jobs in Kern, California were extremely high (7.0 standard deviations from the median). 5083 people were employed which accounts for 2.0% of the economy. Nationwide, its share had a rank of 8 which puts it in the top 1.0% of all counties.

#### **Fresno, California**

Mining jobs in Fresno, California were somewhat high (0.7 standard deviations from the median). 535 people were employed which accounts for 0.2% of the economy. Nationwide, its share had a rank of 140 which puts it in the top 5.0% of all counties.

#### **Tulare, California**

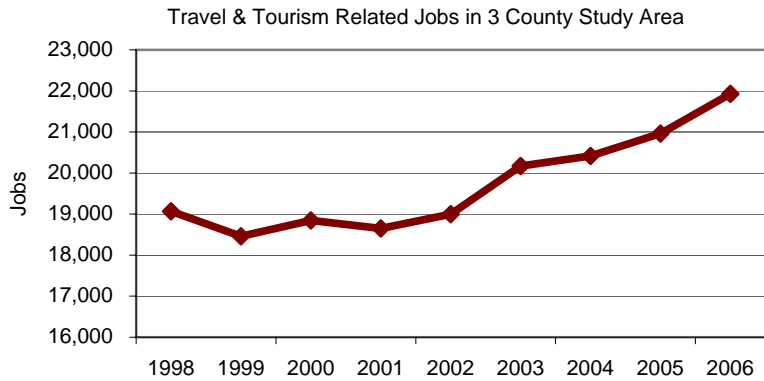
Mining jobs in Tulare, California were roughly average (0.1 standard deviations from the median). 97 people were employed which accounts for 0.1% of the economy. Nationwide, its share had a rank of 617 which puts it in the top 20.0% of all counties.

# 3 County Study Area Trends in Travel & Tourism Employment

## Travel & Tourism Related Jobs Over Time

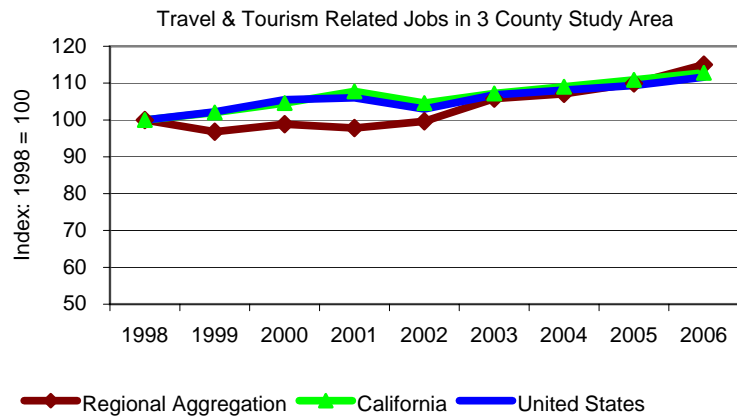
### Travel & Tourism Related Jobs

- According the County Business Patterns, in 2006, the 3 county region employed 21,927 people in the Travel & Tourism industry or 4.1% of total jobs.
- By comparison, Travel & Tourism related jobs in the US accounted for 4.2% of the national economy (excludes proprietors and government).



### Travel & Tourism Related Jobs Relative to the State (Indexed)

- Over the last 8 years Travel & Tourism employment in the region has grown by 15.0%, which is faster than the state and faster than the nation.
- Data is indexed by dividing by the value in 1998 times 100. A value of 100 indicates that it has not changed since 1998.



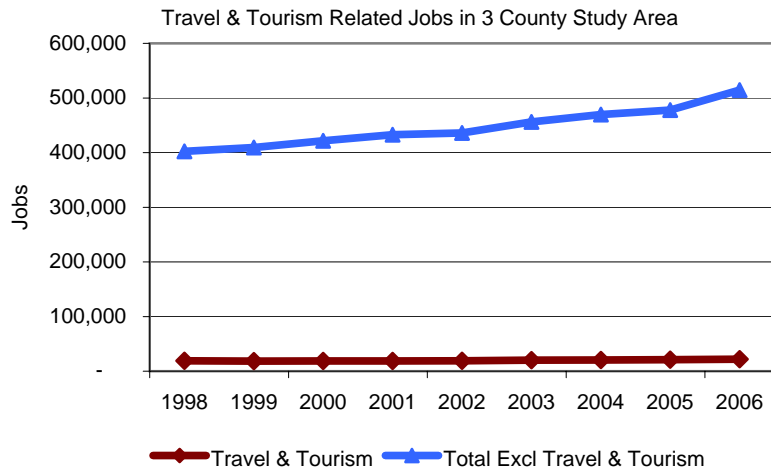
Note: In 1998, the Census changed how it classified sectors so the data before 1998 is not strictly comparable.  
 Source: BEA SPI 2007 and CBP 2006.

What portion of the economy is directly related to Travel & Tourism related jobs?

Travel & Tourism Jobs in Relation to Total

It is important to put the scale of these sectors into perspective based on the total size of the economy. This chart is the same as on the previous page, but it includes total employment (not including proprietors and government).

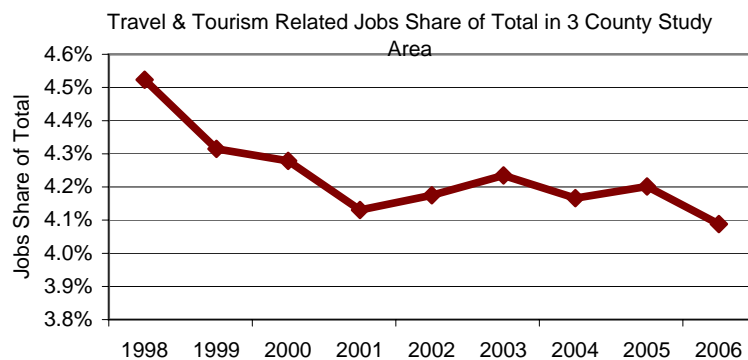
- From 1989 to 2006, when the data used the NAICS method, Travel & Tourism related jobs grew by 2,861 while all private jobs excluding Travel & Tourism grew by 111,940.



Share of Total

These charts track the size of the Travel & Tourism related jobs as a share of the total private employment in the region.

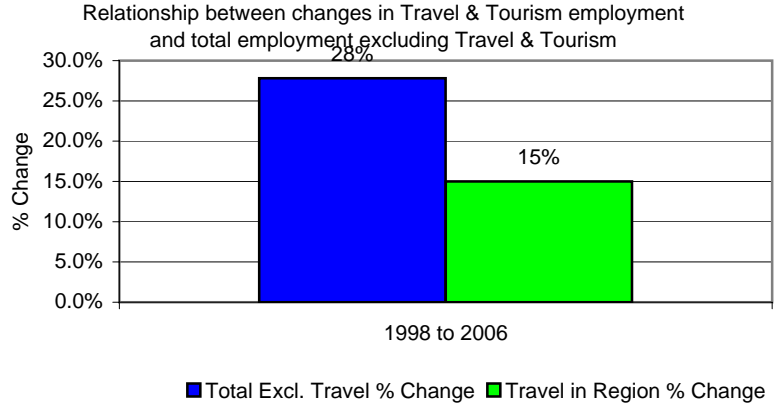
- Since 1998, the share of Travel & Tourism related jobs varied from a low of 4.1% of total jobs in 2006 to a high of 4.5% in 1998
- In 2006, Travel & Tourism related jobs accounted for 4.1% of the total private economy.



Note that these charts are using County Business Patterns data that does not include proprietors or government employment. Source: Census County Business Patterns 2006 with Estimates by Headwaters Economics

## What is the relationship between the Travel & Tourism sector and the rest of the economy?

- From 1989 to 2006, when the data used the NAICS method, Travel & Tourism related jobs grew by 15.0% while all private jobs excluding Travel & Tourism grew by 27.8%.



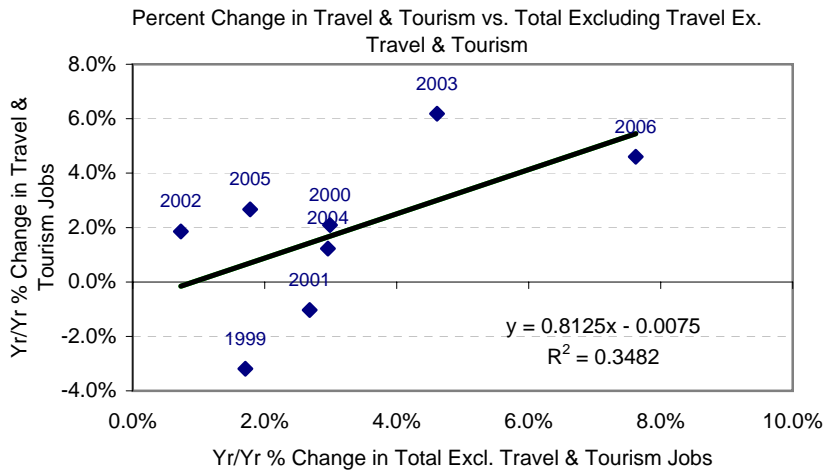
### Year to Year Changes

- These two charts explore how year to year changes in Travel & Tourism related jobs relate to changes in all jobs in the private sector.



### Scatter Plot

- This scatter chart plots the percent change in Travel & Tourism jobs versus the percent change in total jobs excluding Travel & Tourism. When there is a strong relationship, the dots should cluster along a line (straight or perhaps curved).
- Each observation (dot) is labeled with the year that it represents.
- A linear relationship between Travel & Tourism jobs and total jobs excluding Travel & Tourism is weak ( $RSQ = 0.35$ ).

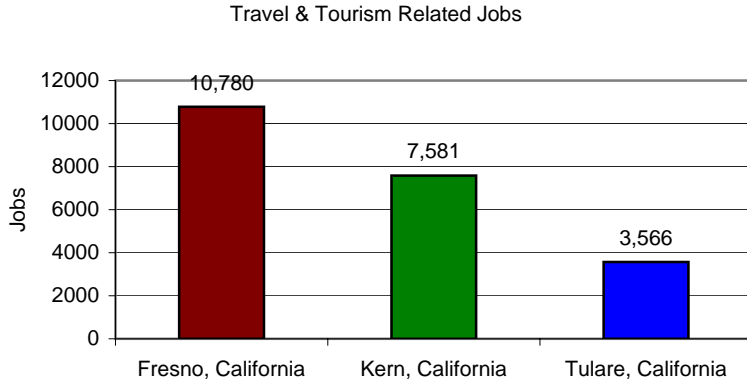


Source: Census County Business Patterns 2006 with Estimates by Headwaters Economics

Where are the Travel & Tourism jobs? Are they spread evenly across the region?

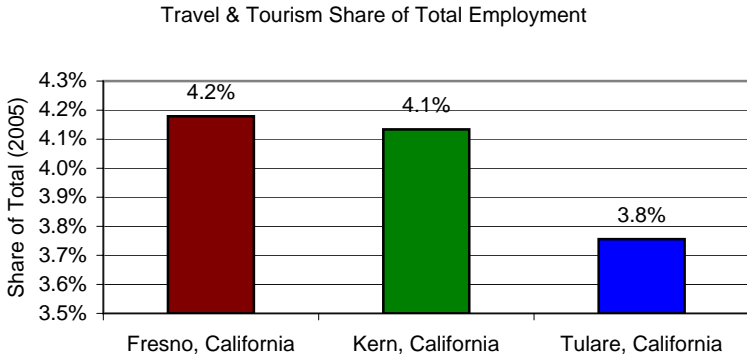
Jobs

- Within the region, Fresno, California employs the most workers in Travel & Tourism (10,780). The least are employed in Tulare, California (3,566). Together, the region employs 3.1% of the state's travel & tourism jobs.



Share of Total

- Within the region, Fresno, California employees the greatest share of workers in Travel & Tourism (4.2%). The least are employed in Tulare, California (3.8%). Together, the region's share is 4.1%, 1.0% lower than the state's share of total (5.0%).



Growth Comparisons

- From 1998 to 2006, 3 counties gained Travel & Tourism related jobs (Fresno, California, Kern, California, Tulare, California).
- None of the counties lost Travel & Tourism related jobs .
- From 1998 to 2006, Fresno, California gained the most Travel & Tourism related jobs (1298).
- From 1998 to 2006, Tulare, California gained the least Travel & Tourism related jobs (734).



Source: Census County Business Patterns 2006 with Estimates by Headwaters Economics

### Fresno, California

Travel & tourism Jobs in Fresno, California were high (1.4 standard deviations from the median). 10780 people were employed which accounts for 4.0% of the economy.

Nationwide, its share had a rank of 100 which puts it in the top 4.0% of all counties.

### Kern, California

Travel & tourism Jobs in Kern, California were somewhat high (1.0 standard deviations from the median). 7581 people were employed which accounts for 4.0% of the economy.

Nationwide, its share had a rank of 159 which puts it in the top 6.0% of all counties.

### Tulare, California

Travel & tourism Jobs in Tulare, California were somewhat high (0.4 standard deviations from the median). 3566 people were employed which accounts for 3.0% of the economy.

Nationwide, its share had a rank of 311 which puts it in the top 10.0% of all counties.

**2006 Travel and Tourism**  
**2006 Employment from County Business Patterns Times % Travel and Tourism Factors**

|   | Tourism Ratio | Fresno,<br>California | Kern,<br>California | Tulare,<br>California | 3 County<br>Region | Region (Tourist<br>Shr. of Total) | United States<br>Tourism<br>(000s) | US<br>Tourism<br>(Shr. of<br>Total) | Ratio of<br>Shares<br>(Region /<br>US) |
|---|---------------|-----------------------|---------------------|-----------------------|--------------------|-----------------------------------|------------------------------------|-------------------------------------|--|
| Crop production *                         | 2%            | #N/A                  | #N/A                | #N/A                  | #N/A               | #N/A                              | #N/A                               | #N/A                                | #N/A                                   |
| Animal Production *                       | 2%            | #N/A                  | #N/A                | #N/A                  | #N/A               | #N/A                              | #N/A                               | #N/A                                | #N/A                                   |
| Forestry and Logging                      | 2%            | 0                     | 0                   | -                     | 0                  | 0.00%                             | 1.3                                | 0.00%                               | 0.1                                    |
| Fishing                                   | 2%            | -                     | -                   | -                     | -                  | 0.00%                             | 0.1                                | 0.00%                               | -                                      |
| Hunting and Trapping                      | 27%           | 0                     | -                   | -                     | 0                  | 0.00%                             | 0.5                                | 0.00%                               | 0.2                                    |
| Mining (except Oil and Gas)               | 2%            | 2                     | 15                  | 2                     | 18                 | 0.00%                             | 4.1                                | 0.00%                               | 1.0                                    |
| Steam and Air-Conditioning Supply         | 2%            | -                     | 0                   | -                     | 0                  | 0.00%                             | 0.0                                | 0.00%                               | 0.9                                    |
| Manufacturing                             | 2%            | 544                   | 274                 | 252                   | 1,071              | 0.20%                             | 272.6                              | 0.23%                               | 0.9                                    |
| Petroleum Refineries                      | 5%            | -                     | 23                  | -                     | 23                 | 0.00%                             | 3.1                                | 0.00%                               | 1.6                                    |
| Ex. Petroleum Refineries                  | 2%            | 544                   | 265                 | 252                   | 1,062              | 0.20%                             | 271.4                              | 0.23%                               | 0.9                                    |
| Wholesale Trade                           | 2%            | 338                   | 160                 | 95                    | 593                | 0.11%                             | 120.6                              | 0.10%                               | 1.1                                    |
| Retail Trade                              | 3%            | 1,123                 | 913                 | 476                   | 2,513              | 0.47%                             | 473.0                              | 0.39%                               | 1.2                                    |
| Gasoline Stations                         | 7%            | 144                   | 163                 | 47                    | 354                | 0.07%                             | 63.9                               | 0.05%                               | 1.2                                    |
| Ex. Gasoline Stations                     | 3%            | 1,061                 | 843                 | 456                   | 2,361              | 0.44%                             | 445.6                              | 0.37%                               | 1.2                                    |
| Transportation and Warehousing            | 2%            | 185                   | 134                 | 107                   | 425                | 0.08%                             | 86.1                               | 0.07%                               | 1.1                                    |
| Air Transportation                        | 81%           | 561                   | 65                  | 20                    | 645                | 0.12%                             | 384.6                              | 0.32%                               | 0.4                                    |
| Ex. Air Transportation                    | 2%            | 171                   | 132                 | 106                   | 409                | 0.08%                             | 76.6                               | 0.06%                               | 1.2                                    |
| Rail Transportation *                     | 4%            | #N/A                  | #N/A                | #N/A                  | #N/A               | #N/A                              | #N/A                               | #N/A                                | #N/A                                   |
| Water Transportation                      | 18%           | -                     | 0                   | -                     | 0                  | 0.00%                             | 12.3                               | 0.01%                               | 0.0                                    |
| Urban Transit Systems                     | 13%           | 9                     | 11                  | 14                    | 35                 | 0.01%                             | 6.4                                | 0.01%                               | 1.2                                    |
| Interurban and Rural Bus Transportati     | 95%           | 66                    | 13                  | 29                    | 107                | 0.02%                             | 15.6                               | 0.01%                               | 1.5                                    |
| Taxi Service                              | 31%           | -                     | 5                   | -                     | 5                  | 0.00%                             | 9.5                                | 0.01%                               | 0.1                                    |
| Limousine Service                         | 13%           | 5                     | 2                   | 2                     | 9                  | 0.00%                             | 5.0                                | 0.00%                               | 0.4                                    |
| Charter Bus Industry                      | 82%           | 74                    | 14                  | 51                    | 139                | 0.03%                             | 22.9                               | 0.02%                               | 1.4                                    |
| Other Transit and Ground Passenger T      | 13%           | 42                    | 6                   | 3                     | 51                 | 0.01%                             | 7.9                                | 0.01%                               | 1.4                                    |
| Scenic and Sightseeing Transportation     | 97%           | -                     | 2                   | -                     | 2                  | 0.00%                             | 25.9                               | 0.02%                               | 0.0                                    |
| Support Activities for Air Transportation | 81%           | 81                    | 126                 | 32                    | 239                | 0.04%                             | 128.2                              | 0.11%                               | 0.4                                    |
| Support Activities for Rail Transportati  | 4%            | 2                     | 3                   | -                     | 4                  | 0.00%                             | 1.1                                | 0.00%                               | 0.8                                    |
| Support Activities for Water Transporta   | 18%           | 0                     | -                   | -                     | 0                  | 0.00%                             | 16.5                               | 0.01%                               | 0.0                                    |
| Support Activities for Road Transportat   | 13%           | 29                    | 38                  | 5                     | 72                 | 0.01%                             | 9.3                                | 0.01%                               | 1.7                                    |
| Publishing Industries (except Internet)   | 2%            | 29                    | 11                  | 7                     | 47                 | 0.01%                             | 20.8                               | 0.02%                               | 0.5                                    |

**2006 Travel and Tourism**  
**2006 Employment from County Business Patterns Times % Travel and Tourism Factors**

|   | Tourism Ratio | Fresno,<br>California | Kern,<br>California | Tulare,<br>California | 3 County<br>Region | Region (Tourist<br>Shr. of Total) | United States<br>Tourism<br>(000s) | US<br>Tourism<br>(Shr. of<br>Total) | Ratio of<br>Shares<br>(Region /<br>US) |
|---|---------------|-----------------------|---------------------|-----------------------|--------------------|-----------------------------------|------------------------------------|-------------------------------------|--|
| Motion Picture and Sound Recording In   | 2%            | 8                     | 6                   | 2                     | 16                 | 0.00%                             | 6.6                                | 0.01%                               | 0.6                                    |
| Motion Picture and Video Exhibition     | 17%           | 63                    | 43                  | 17                    | 122                | 0.02%                             | 22.9                               | 0.02%                               | 1.2                                    |
| Ex. Motion Picture and Video Exhibitio  | 2%            | 1                     | 1                   | 0                     | 2                  | 0.00%                             | 3.9                                | 0.00%                               | 0.1                                    |
| Libraries and Archives                  | 27%           | -                     | -                   | -                     | -                  | 0.00%                             | 8.5                                | 0.01%                               | -                                      |
| Automotive Equipment Rental and Lea     | 58%           | 123                   | 93                  | 28                    | 244                | 0.05%                             | 107.0                              | 0.09%                               | 0.5                                    |
| Telephone Call Centers                  | 2%            | 8                     | 2                   | 3                     | 13                 | 0.00%                             | 7.7                                | 0.01%                               | 0.4                                    |
| Travel Arrangement and Reservation S    | 93%           | 184                   | 105                 | 74                    | 363                | 0.07%                             | 235.8                              | 0.20%                               | 0.3                                    |
| Performing Arts Companies               | 17%           | 17                    | 36                  | 12                    | 65                 | 0.01%                             | 22.7                               | 0.02%                               | 0.6                                    |
| Spectator Sports                        | 27%           | 33                    | 51                  | 2                     | 86                 | 0.02%                             | 32.5                               | 0.03%                               | 0.6                                    |
| Racetracks                              | 27%           | 0                     | 34                  | -                     | 35                 | 0.01%                             | 13.0                               | 0.01%                               | 0.6                                    |
| Ex. Racetracks                          | 27%           | 33                    | 17                  | 2                     | 51                 | 0.01%                             | 19.4                               | 0.02%                               | 0.6                                    |
| Promoters of Performing Arts, Sports, & | 27%           | 97                    | 92                  | 4                     | 193                | 0.04%                             | 28.9                               | 0.02%                               | 1.5                                    |
| Agents and Managers for Artists, Athlet | 27%           | 0                     | -                   | 8                     | 8                  | 0.00%                             | 4.4                                | 0.00%                               | 0.4                                    |
| Independent Artists, Writers, and Perfo | 17%           | 3                     | 17                  | 3                     | 22                 | 0.00%                             | 8.1                                | 0.01%                               | 0.6                                    |
| Museums, Historical Sites, and Similar  | 27%           | 40                    | 10                  | 6                     | 56                 | 0.01%                             | 33.3                               | 0.03%                               | 0.4                                    |
| Amusement Parks and Arcades             | 27%           | 46                    | 27                  | 29                    | 102                | 0.02%                             | 36.8                               | 0.03%                               | 0.6                                    |
| Gambling Industries                     | 39%           | 617                   | 63                  | 286                   | 966                | 0.18%                             | 76.4                               | 0.06%                               | 2.8                                    |
| Other Amusement and Recreation Indu     | 27%           | 481                   | 358                 | 135                   | 974                | 0.18%                             | 295.2                              | 0.25%                               | 0.7                                    |
| Golf Courses and Country Clubs          | 27%           | 128                   | 152                 | 67                    | 348                | 0.06%                             | 83.5                               | 0.07%                               | 0.9                                    |
| Skiing Facilities                       | 27%           | -                     | 4                   | -                     | 4                  | 0.00%                             | 20.3                               | 0.02%                               | 0.0                                    |
| Fitness and Recreational Sports Cente   | 27%           | 269                   | 142                 | 62                    | 473                | 0.09%                             | 137.1                              | 0.11%                               | 0.8                                    |
| Other                                   | 27%           | 84                    | 60                  | 6                     | 149                | 0.03%                             | 54.2                               | 0.05%                               | 0.6                                    |
| Traveler Accommodation                  | 74%           | 1,267                 | 1,162               | 372                   | 2,801              | 0.52%                             | 1,354.6                            | 1.13%                               | 0.5                                    |
| RV (Recreational Vehicle) Parks and R   | 74%           | 77                    | 74                  | 18                    | 169                | 0.03%                             | 28.3                               | 0.02%                               | 1.3                                    |
| Food Services and Drinking Places       | 19%           | 4,395                 | 3,401               | 1,385                 | 9,182              | 1.71%                             | 1,805.1                            | 1.51%                               | 1.1                                    |
| Repair and Maintenance                  | 2%            | 65                    | 62                  | 26                    | 153                | 0.03%                             | 26.1                               | 0.02%                               | 1.3                                    |
| Automotive Repair and Maintenance       | 6%            | 144                   | 126                 | 59                    | 329                | 0.06%                             | 53.3                               | 0.04%                               | 1.4                                    |
| Ex. Automotive Repair and Maintenanc    | 2%            | 17                    | 20                  | 6                     | 44                 | 0.01%                             | 8.4                                | 0.01%                               | 1.2                                    |
| Parking Lots and Garages                | 16%           | 6                     | 3                   | -                     | 9                  | 0.00%                             | 17.9                               | 0.01%                               | 0.1                                    |
| Toll highways *                         |               | #N/A                  | #N/A                | #N/A                  | #N/A               | #N/A                              | #N/A                               | #N/A                                | #N/A                                   |
| Travel & Tourism Total                  |               | 10,780                | 7,581               | 3,566                 | 21,927             | 4.09%                             | 5,845.3                            | 4.87%                               | 0.8                                    |
| Total (Incl. Not Travel Related)        |               | 257,975               | 183,412             | 94,949                | 536,336            |                                   | 119,917.0                          |                                     |  |
| Share of Total                          |               | 4.2%                  | 4.1%                | 3.8%                  | 4.1%               |                                   | 4.9%                               |                                     |  |

\* Estimate based on the number of firms by size.

\*\* Denote sectors that are not available from County Business Patterns.

Shaded rows show sectors that regionally employ more people (as a share of total) than in the US.

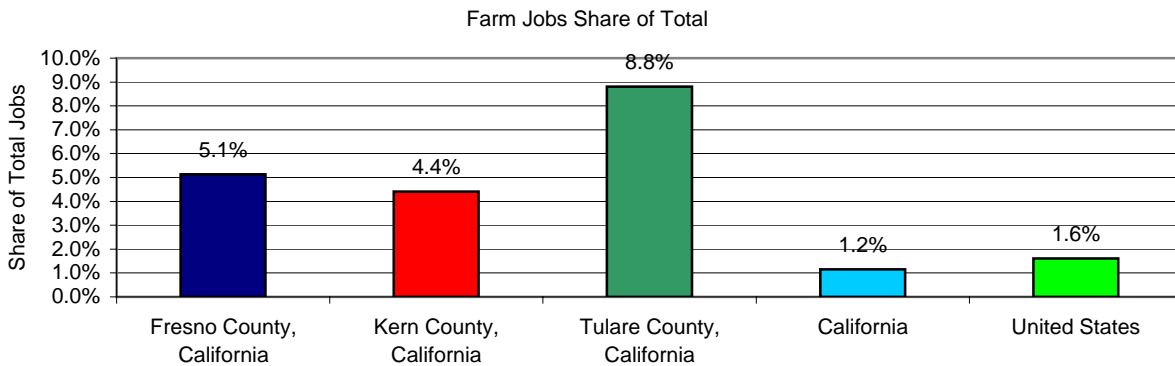
Source: County Business Patterns 2006, Headwaters Economics estimates when data were not disclosed. Travel and tourism share factors are from the Bureau of Economic Analysis, Survey of Current Business (Sept. 2004).

## Agriculture's Share of the Economy (2006)

This page assesses the role of agriculture in the overall county and regional economy two different ways, first as a share of total jobs and then as a share of total personal income.

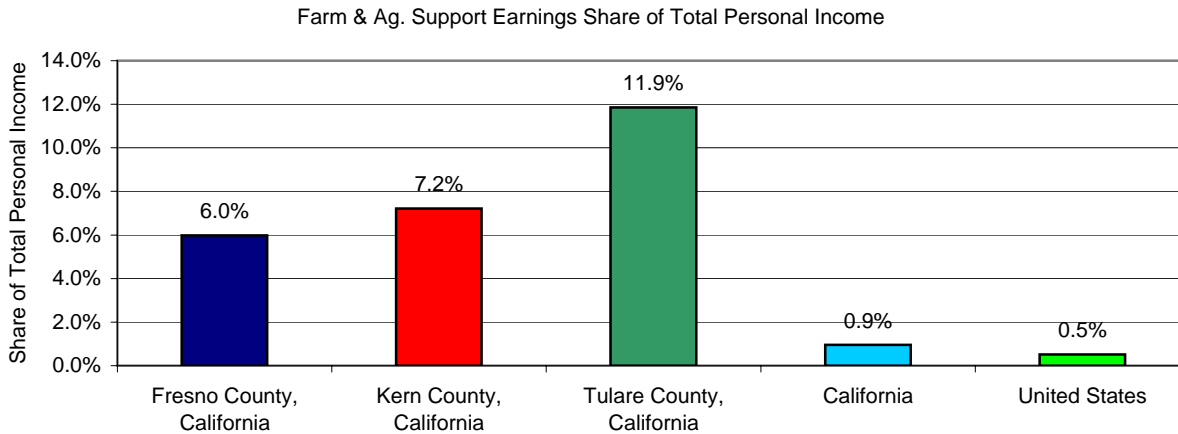
### Employment

|                     | Fresno County, California | Kern County, California | Tulare County, California | California | United States |
|---------------------|---------------------------|-------------------------|---------------------------|------------|---------------|
| Farm employment     | 22,661                    | 15,613                  | 16,740                    | 237,799    | 2,868,000     |
| Share of Total Jobs | 5.1%                      | 4.4%                    | 8.8%                      | 1.2%       | 1.6%          |



### Income

|   | Fresno County, California | Kern County, California | Tulare County, California | California | United States |
|---|---------------------------|-------------------------|---------------------------|------------|---------------|
| Farm earnings                               | 642,025                   | 768,875                 | 587,056                   | 7,633,563  | 38,980,000    |
| Share of Total Personal Income              | 2.7%                      | 3.8%                    | 5.9%                      | 0.5%       | 0.4%          |
| Agriculture and forestry support activities | 792,951                   | 676,771                 | 597,620                   | 5,989,791  | 17,119,000    |
| Farm & Ag. Services                         | 1,434,976                 | 1,445,646               | 1,184,676                 | 13,623,354 | 56,099,000    |
| Share of Total Personal Income              | 6.0%                      | 7.2%                    | 11.9%                     | 0.9%       | 0.5%          |



County production rankings, by livestock inventory and crop acreage, 2002

**Fresno**

|   | Quantity  | State Rank | Universe Rank |
|---|-----------|------------|---------------|
| <b>Livestock (by number)</b>                                  |           |            |               |
| Broilers and other meat-type chickens                         | 9,918,936 | 2 in 50    | 28 in 2,599   |
| Turkeys   | 1,053,599 | 2 in 48    | 24 in 2,348   |
| Cattle and calves   | 396,519   | 4 in 57    | 6 in 3,059    |
| Sheep and lambs   | 38,112    | 6 in 57    | 25 in 2,867   |
| Layers, 20 weeks and older                                    | (D)       | (D)        | (D)           |
| <b>Crops (by acre)</b>  |           |            |               |
| Grapes  | 232,659   | 1 in 52    | 1 in 1,830    |
| All cotton  | 218,333   | 1 in 17    | 5 in 663      |
| All vegetables harvested                                      | 199,321   | 2 in 56    | 2 in 2,710    |
| Forage -- land used for hay, haylage, grass silage, greenchop | 102,165   | 6 in 57    | 41 in 3,059   |
| Tomatoes  | 102,137   | 1 in 54    | 1 in 2,209    |

**Kern**

|   | Quantity | State Rank | Universe Rank |
|---|----------|------------|---------------|
| <b>Livestock (by number)</b>                                  |          |            |               |
| Sheep and lambs   | 121,593  | 2 in 27    | 3 in 2,867    |
| Colonies of bees  | 34,653   | 2 in 54    | 2 in 2,392    |
| Layers, 20 weeks and older                                    | (D)      | 7 in 56    | (D)           |
| Cattles and calves  | 260,040  | 8 in 57    | 19 in 3,059   |
| Horses and ponies   | 4,241    | 10 in 57   | 89 in 3,065   |
| <b>Crops (by acre)</b>  |          |            |               |
| Almonds   | 112,492  | 1 in 41    | 1 in 72       |
| Grapes  | 96,510   | 2 in 52    | 2 in 1,830    |
| All cotton  | 138,596  | 3 in 17    | 14 in 663     |
| Forage -- land used for hay, haylage, grass silage, greenchop | 133,655  | 4 in 57    | 20 in 3,059   |
| All vegetables harvested                                      | 71,672   | 5 in 56    | 6 in 2,710    |

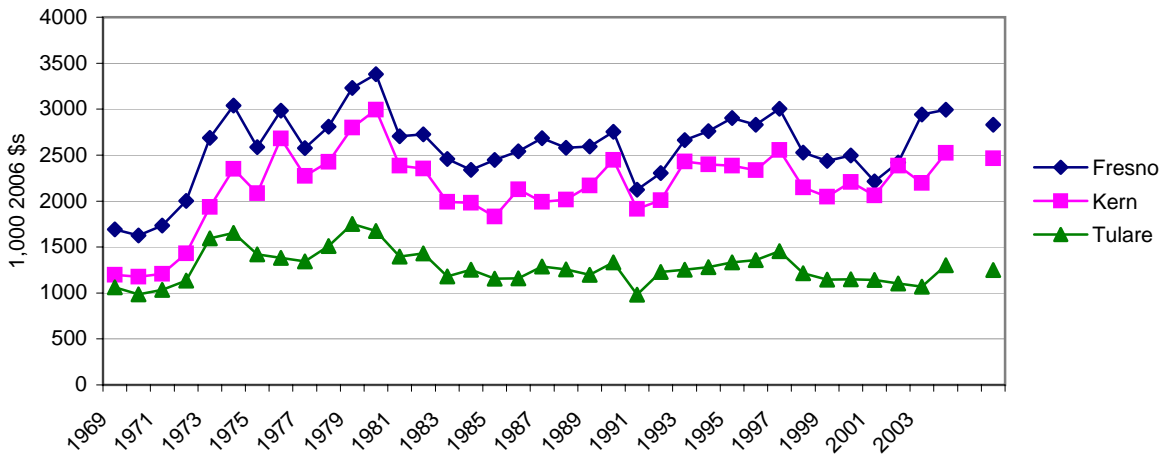
**Tulare**

|   | Quantity  | State Rank | Universe Rank |
|---|-----------|------------|---------------|
| <b>Livestock (by number)</b>                                  |           |            |               |
| Cattle and Calves   | 900,124   | 1 in 58    | 1 in 3,059    |
| Hogs and pigs   | 6,341     | 1 in 54    | (D)           |
| Sheep and lambs   | 64,913    | 3 in 57    | 9 in 2,867    |
| Broilers and other meat-type chickens                         | 2,057,193 | 4 in 50    | 189 in 2,599  |
| Turkeys   | 238,136   | 7 in 48    | 98 in 2,328   |
| <b>Crops (by acre)</b>  |           |            |               |
| Corn for silage   | 116,752   | 1 in 33    | 1 in 2,307    |
| Oranges   | 111,599   | 1 in 42    | 1 in 123      |
| Forage -- land used for hay, haylage, grass silage, greenchop | 168,110   | 2 in 57    | 7 in 3,059    |
| All cotton  | 58,946    | 4 in 17    | 57 in 663     |
| Grapes  | 63,379    | 5 in 52    | 5 in 1,830    |

Source: Census of Agriculture

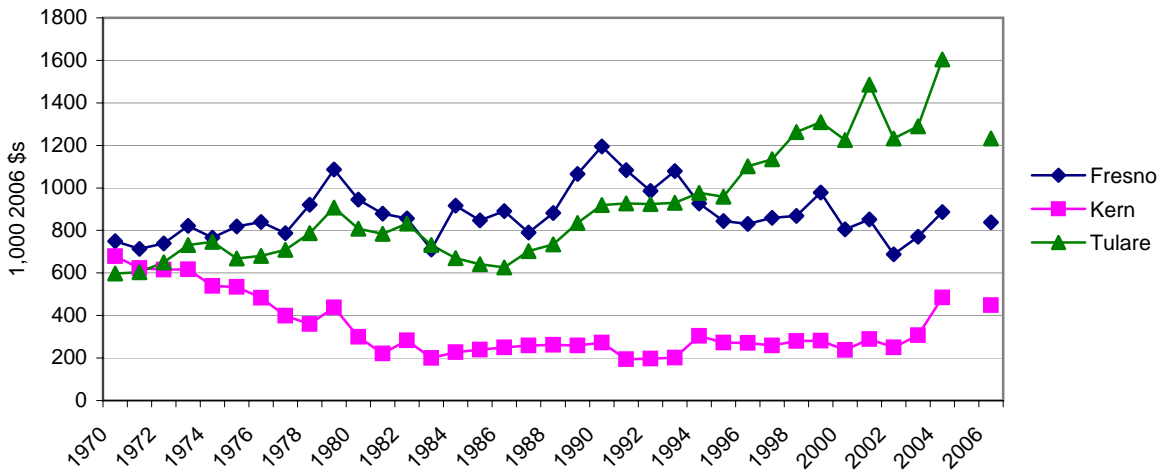
Trends in Income from Crops

Income from Crops, Fresno, Kern and Tulare Counties, California, 1970-2006



Trends in Income from Livestock

Income from Livestock, Fresno, Kern and Tulare Counties, California, 1970-2006



Source: Census of Agriculture



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# **A Profile of the Environmental Justice in 3 County Study Area**

**Tulare California, Kern California, and Fresno California**

Produced by the  
**Economic Profile System Analyst (EPSA)**

October 10, 2008

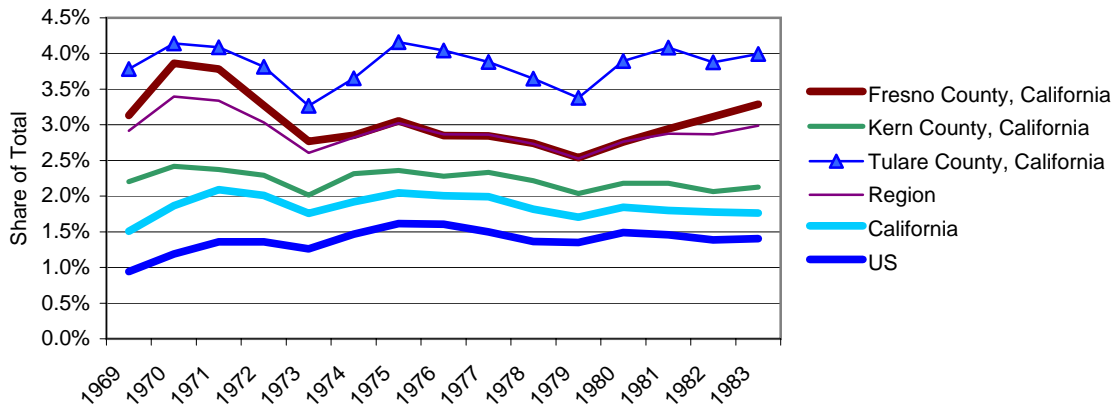
Indicators of Poverty

|   | California  | Fresno California | Kern California, | Tulare California, |
|---|-------------|-------------------|------------------|--------------------|
| <b>Poverty and Earnings</b>                       |             |                   |                  |                    |
| Population (2006)                                 | 20,170,059  | 434,045           | 407,581          | 213,751            |
| Population living below poverty                   | 4,706,130   | 179,085           | 130,949          | 86,572             |
| Percent Under Poverty                             | 14%         | 23%               | 21%              | 24%                |
| Families below poverty                            | 845,991     | 33,175            | 26,467           | 16,502             |
| Percent Under Poverty                             | 11%         | 18%               | 17%              | 19%                |
| Per Capita Income (2006)                          | 39,626      | 27,081            | 25,938           | 24,153             |
| Average Earnings Per Job (2006)                   | 54,828      | 41,453            | 44,791           | 37,316             |
| <b>Components of Income</b>                       |             |                   |                  |                    |
| Labor Income                                      | 999,166,720 | 15,980,379        | 13,874,440       | 6,529,126          |
| Percent Under Total Personal Income               | 70%         | 67%               | 69%              | 65%                |
| Non-labor Income                                  | 437,279,168 | 8,000,084         | 6,167,221        | 3,464,481          |
| Percent Under Total Personal Income               | 30%         | 33%               | 31%              | 35%                |
| Age-related                                       | 96,021,596  | 1,858,808         | 1,894,713        | 898,121            |
| Percent Under Total Personal Income               | 6.7%        | 7.8%              | 9.5%             | 9.0%               |
| Welfare   | 24,036,976  | 919,328           | 677,273          | 436,222            |
| Percent Under Total Personal Income               | 1.7%        | 3.8%              | 3.4%             | 4.4%               |
| <b>Growth (90 to 06 Annual Rate in 2006 \$'s)</b> |             |                   |                  |                    |
| Population  | 1.3%        | 1.9%              | 2.3%             | 1.9%               |
| Employment  | 1.3%        | 1.6%              | 2.2%             | 2.0%               |
| Income  | 2.4%        | 2.2%              | 2.4%             | 2.2%               |
| Per Capita Income                                 | 1.2%        | 0.3%              | 0.1%             | 0.4%               |
| Average Earnings                                  | 1.2%        | 0.6%              | 0.2%             | 0.6%               |

Cells are green when the value exceeds the value for the state by at least 20%, red when it is at least 20% lower than the state. Rows with levels are not color coded because counties are always lower than the state.

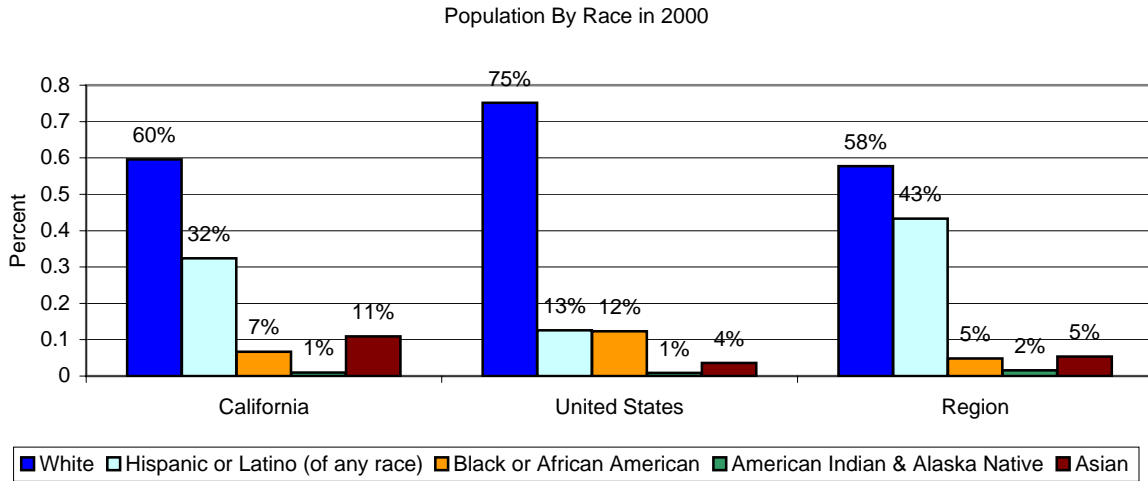
Welfare payments as a % of Total Personal Income

Income Maintenance (Welfare) as a Share of Total Personal Income



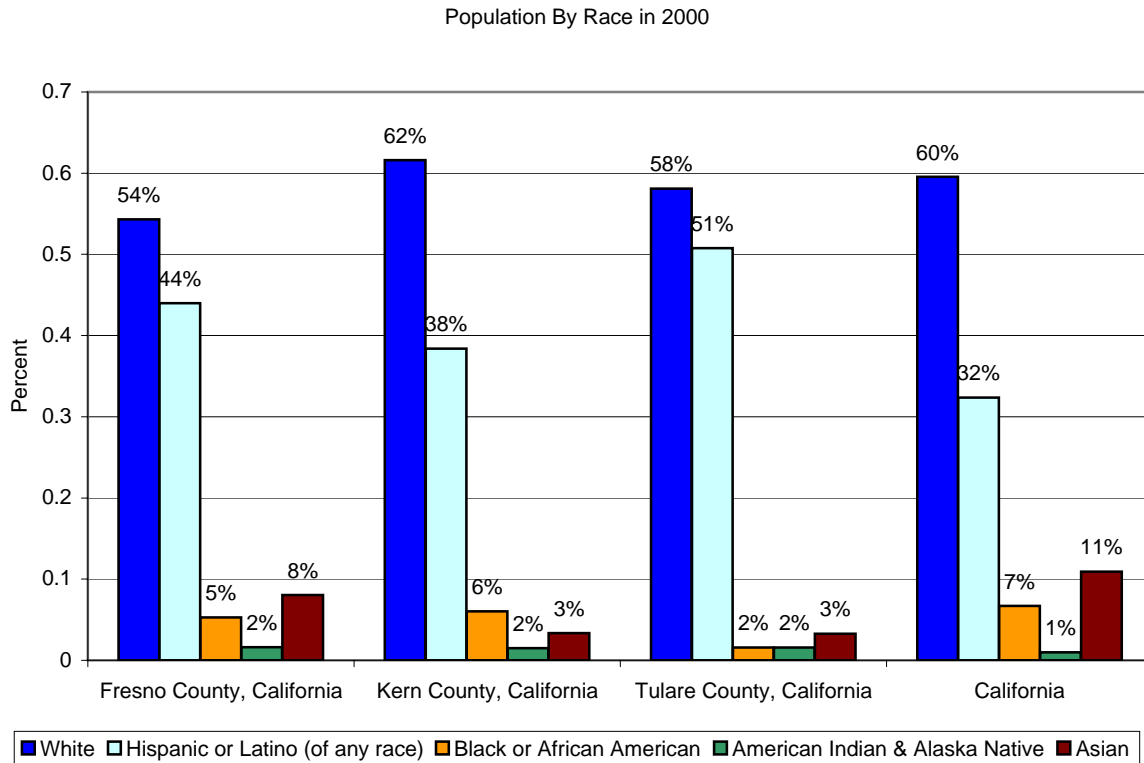
Population by Race in the Region

How does the region compare to the state and the nation.



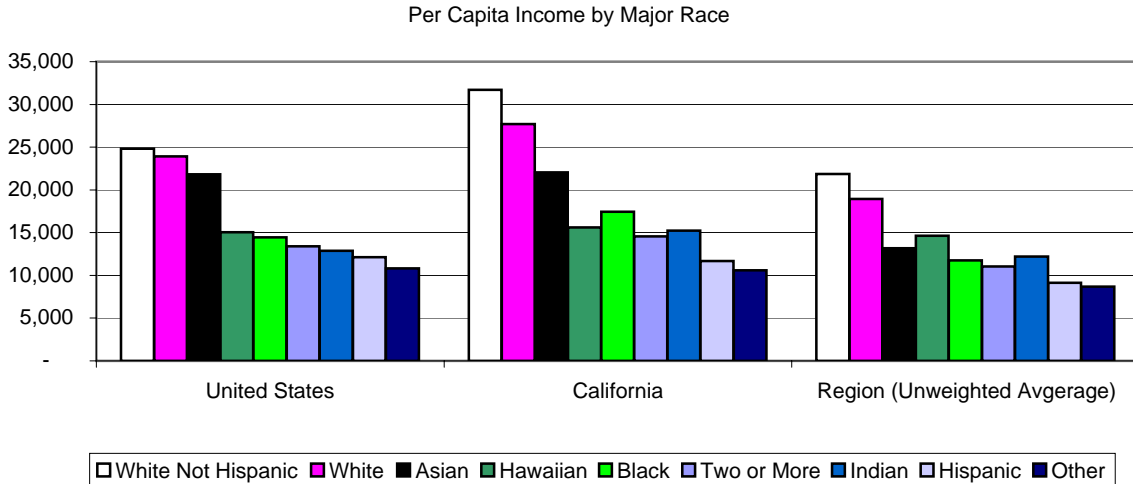
Population by Race by County

How do the counties vary within the region.



Source: BEA SPI 2007 and CBP 2006.

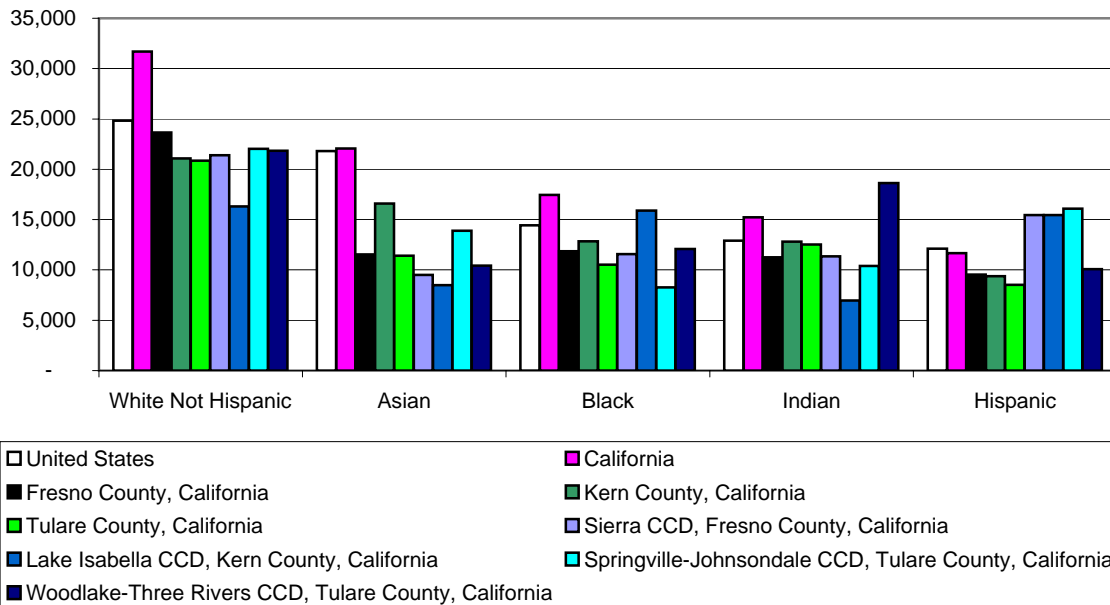
## Per Capita Income by Race in the Region



## By Geography

- White incomes are pretty consistent in the region, but less than in the state. Lake Isabella is a little lower, perhaps because it has more retirees.
- Hispanics seem to be doing better in the subdivisions closer to the Sequoia NF, sometimes better than in the state.
- This chart highlights differences between the subdivisions near the forest relative to the counties as a whole.

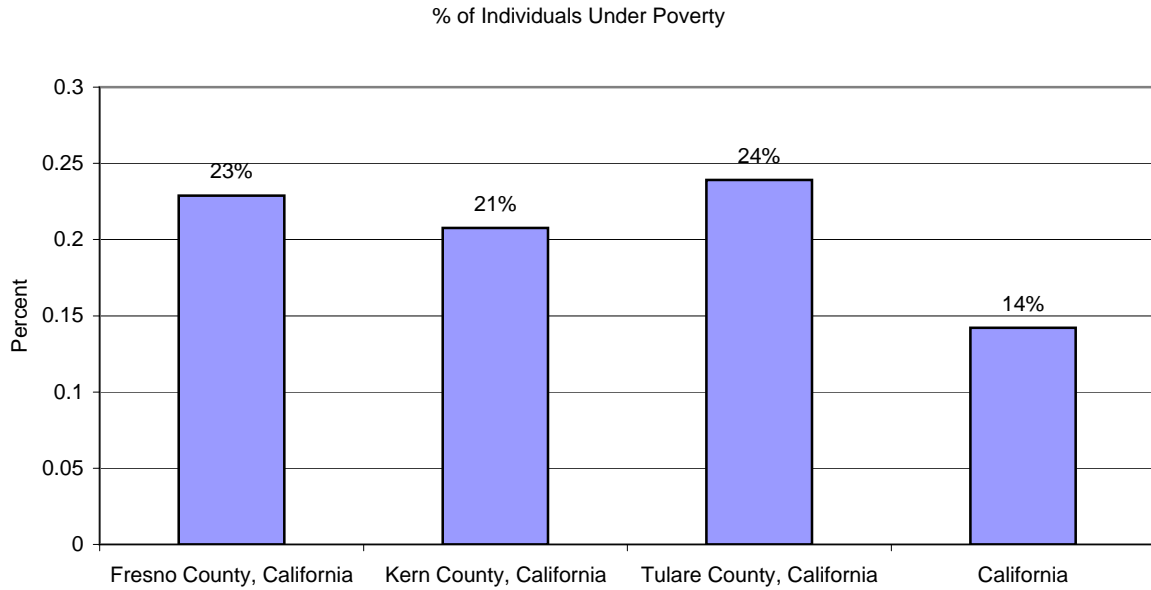
Per Capita Income by Major Race and Geography



Source: BEA SPI 2007 and CBP 2006.

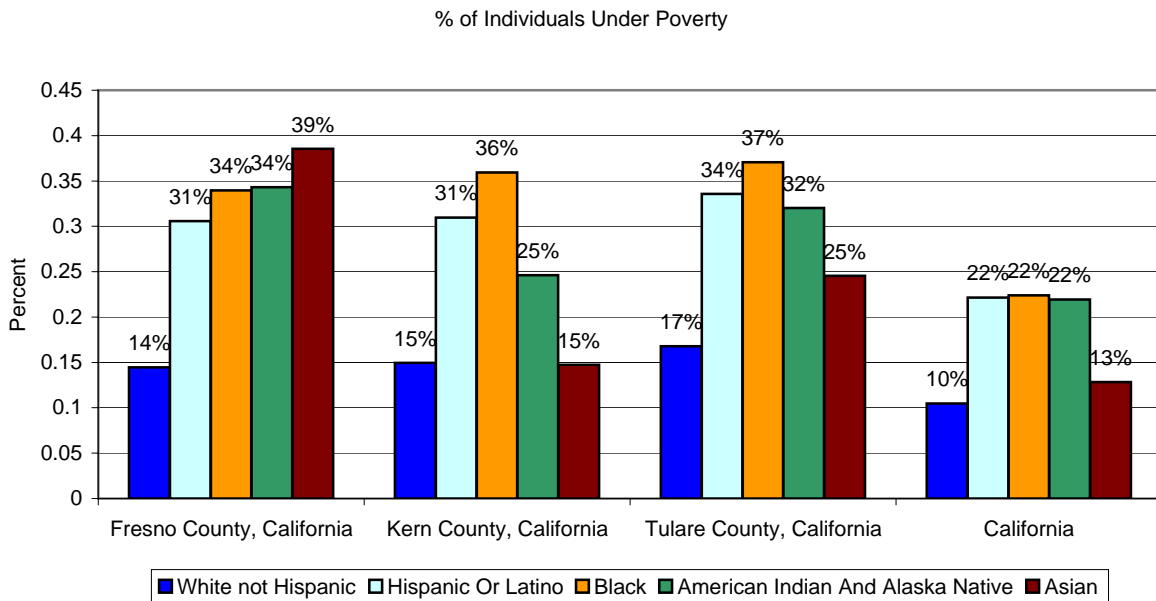
Poverty by County

More Poverty than in state.



Poverty by Race and County

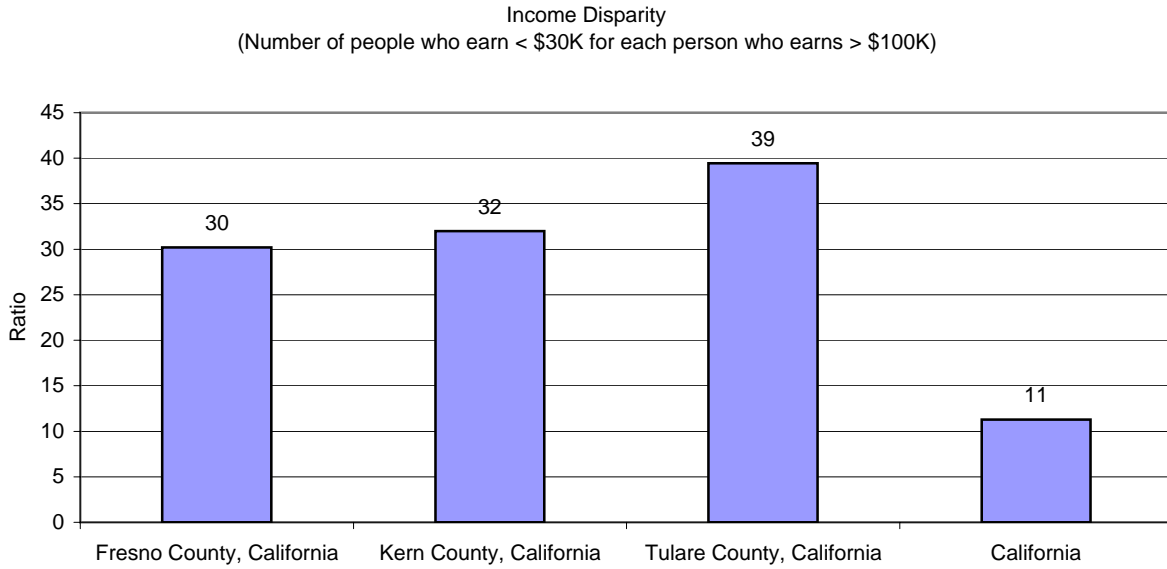
Poverty rates vary greatly by race.



Source: BEA SPI 2007 and CBP 2006.

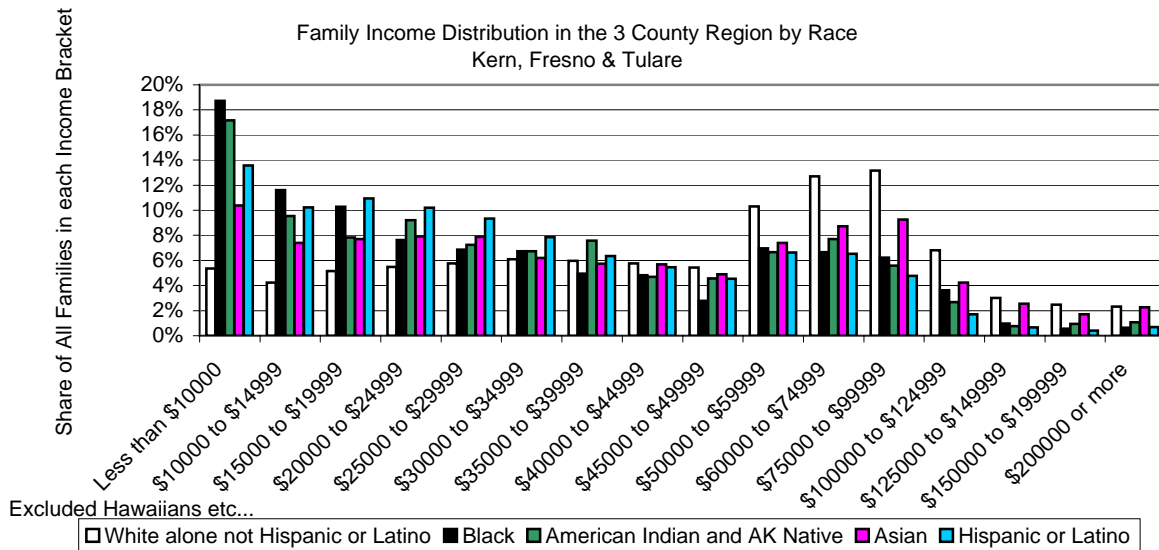
Ratio of Rich to Poor

More disparity than in the state.



Family Income Distribution by Race

- More Blacks, American Indians, Asians & Hispanics in the poorest brackets
- For Blacks, American Indians & Hispanics, the most common income bracket is less than \$10,000.
- More Whites and Asians in the middle classes
- More Whites and Asians in the richest brackets
- For whites, the most common incomes are in the middle classes (\$50K-\$100K).



Source: BEA SPI 2007 and CBP 2006.

Percent of Adults Without a High School Diploma

|   | United States | California | Fresno County, California | Kern County, California | Tulare County, California |
|---|---------------|------------|---------------------------|-------------------------|---------------------------|
| White alone population                              | 16%           | 17%        | 22.1%                     | 23.8%                   | 27.8%                     |
| Black or African American alone population          | 28%           | 19%        | 26.7%                     | 25.9%                   | 34.6%                     |
| American Indian and Alaska Native alone population  | 29%           | 32%        | 39.9%                     | 36.2%                   | 38.2%                     |
| Asian alone population                              | 20%           | 19%        | 40.9%                     | 29.1%                   | 42.6%                     |
| Native Hawaiian and Other Pacific Islander alone po | 22%           | 24%        | 38.2%                     | 20.3%                   | 28.0%                     |
| Some other race alone population                    | 53%           | 58%        | 59.8%                     | 60.5%                   | 65.1%                     |
| Two or more races population                        | 27%           | 29%        | 39.1%                     | 34.2%                   | 42.3%                     |
| Hispanic or Latino population                       | 48%           | 53%        | 56.3%                     | 58.9%                   | 62.4%                     |
| White alone; not Hispanic or Latino population      | 15%           | 10%        | 14.2%                     | 18.0%                   | 19.4%                     |

Percent of Adults Without a High School Diploma

