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A Profile of the Travel & Tourism in 3 County Study Area

Tulare California, Kern California, and Fresno California

Produced by the
Economic Profile System Analyst (EPSA)

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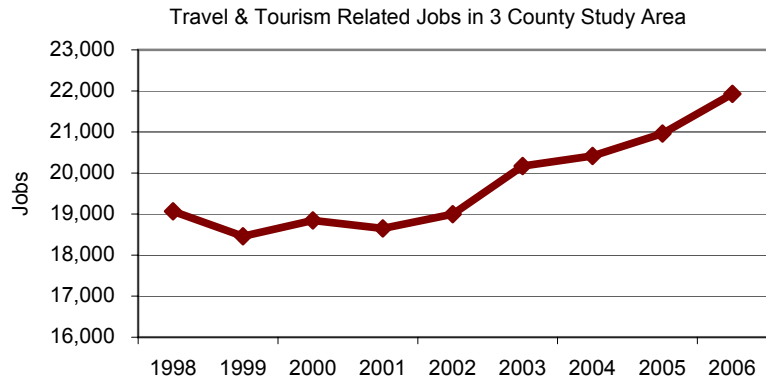
- 3 [Trends in Travel & Tourism Employment](#)
- 4 [Share of Total](#)
- 5 [Relationship with Other Sectors](#)
- 6 [Differences Within Region](#)
- 7 [Ranking](#)
- 9 [Travel & Tourism Related Employment - Detailed Sector Analysis](#)

3 County Study Area **Trends in Travel & Tourism Employment**

Travel & Tourism Related Jobs Over Time

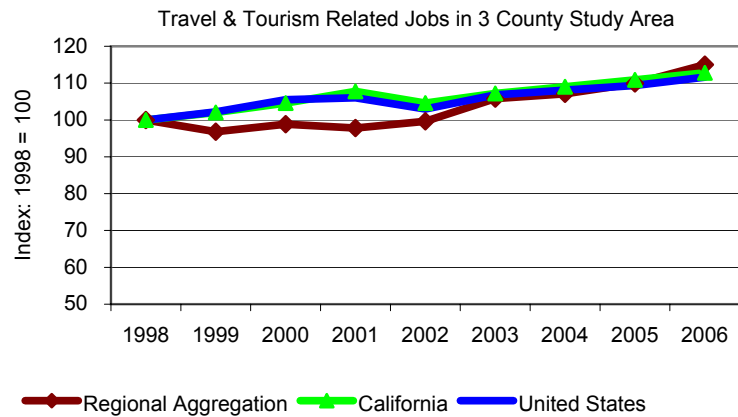
Travel & Tourism Related Jobs

- 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.



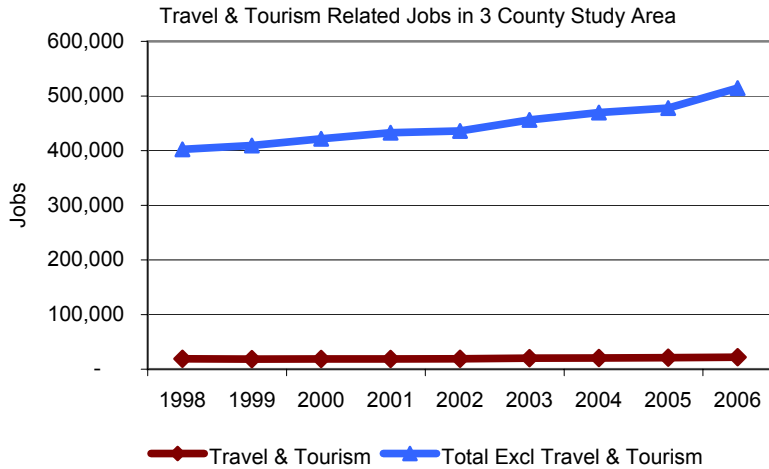
Note: In 1998, the Census changed how it classified sectors so the data before 1998 is not strictly comparable.
 Source: BEA SPI 2007 and CBP 2006.

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.

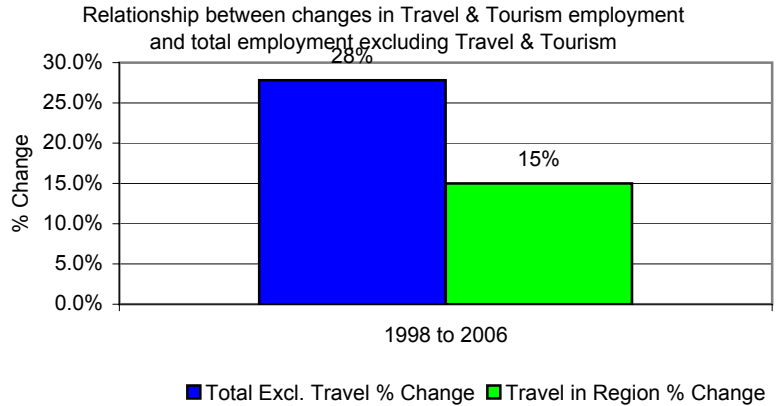
- Since 1998, the share of Travel & Tourism related jobs varied from a low of 4.1% of total jobs in 2006 to a high of 4.5% in 1998
- In 2006, Travel & Tourism related jobs accounted for 4.1% of the total private economy.



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%.



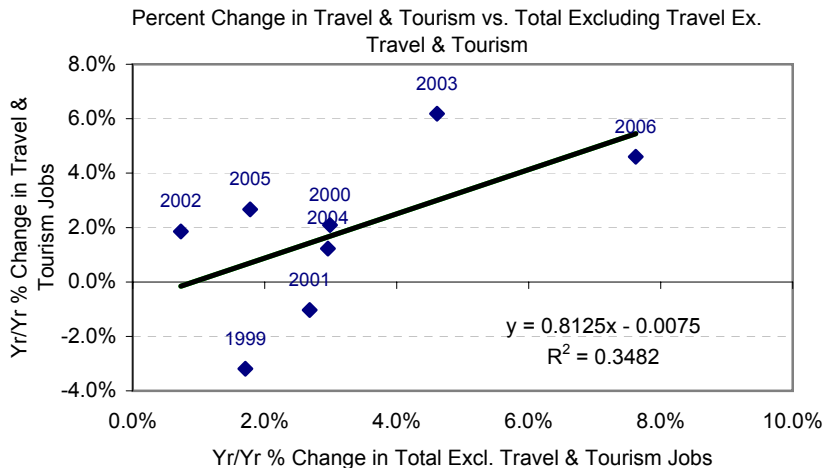
Year to Year Changes

- 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).

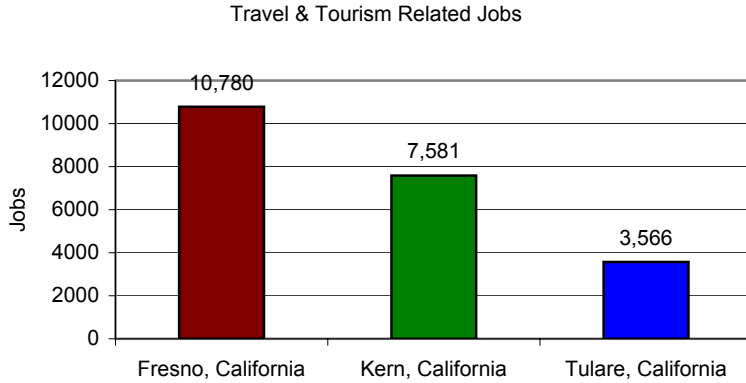


Source: Census County Business Patterns 2006 with Estimates by Headwaters Economics

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

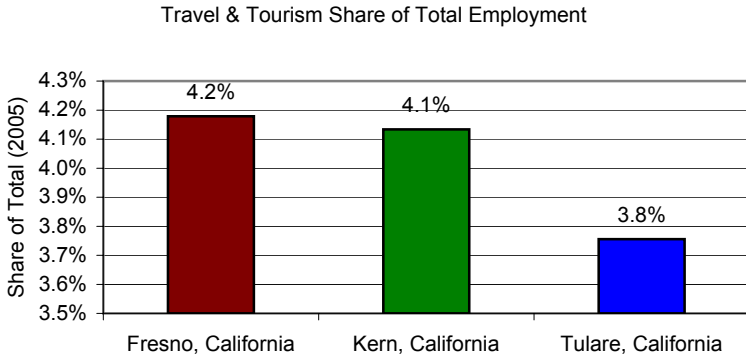
Jobs

- 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.



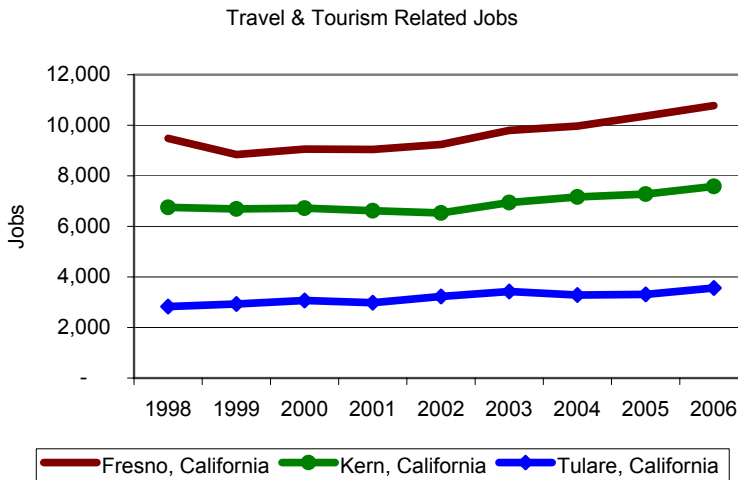
Share of Total

- 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.

3 County Study Area

Ranking

This table shows ranking in two ways, one using total jobs and the other using Mining jobs as a share of total to illustrate how the counties in the study area are doing relative to the top counties in the nation. Mining jobs are also broken out by stage

	Shares		Jobs	
	Travel Share of Total (in US*)	Rank (in US*)	Travel & Tourism Jobs	Rank (in US*)

Study Area

Fresno, California	4.0%	1,411	10,780	100
Kern, California	4.0%	1,456	7,581	159
Tulare, California	3.0%	1,876	3,566	311

Top Travel & Tourism Counties - Sorted by Travel & Tourism Share of Total (in Yellow)

1 Ohio, Indiana	96.8%	1	1,467	630
2 Switzerland, Indiana	77.6%	2	1,510	611
3 Alpine, California	70.3%	3	572	1,099
4 Mahnomon, Minnesota	69.4%	4	1,321	680
5 Tunica, Mississippi	65.2%	5	9,355	125
6 Menominee, Wisconsin	59.2%	6	512	1,178
7 Gilpin, Colorado	57.8%	7	2,770	388
8 Daggett, Utah	49.1%	8	64	2,554
9 Buffalo, South Dakota	40.0%	9	56	2,621
10 Billings, North Dakota	35.4%	10	33	2,830

Top Travel & Tourism Counties - Sorted by Travel & Tourism Jobs (in Yellow)

1 Los Angeles, California	4.9%	922	192,288	1
2 Clark, Nevada	20.7%	38	175,801	2
3 Cook, Illinois	5.2%	807	121,736	3
4 Maricopa, Arizona	6.1%	532	97,431	4
5 New York, New York	4.3%	1,305	87,320	5
6 Harris, Texas	5.0%	879	86,638	6
7 San Diego, California	6.3%	499	75,666	7
8 Miami-Dade, Florida	8.1%	296	70,482	8
9 Orange, California	4.8%	1,005	70,253	9
10 Orange, Florida	10.0%	189	66,312	10

* Ranks are out of 3,138 counties in the United States.

Sources: CBP 2008, with estimates by Headwaters Economics.

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

	Tourism Ratio	Fresno, California	Kern, California	Tulare, California	3 County Region	Region (Tourist Shr. of Total)	United States Tourism (000s)	US Tourism (Shr. of Total)	Ratio of Shares (Region / 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, California	Kern, California	Tulare, California	3 County Region	Region (Tourist Shr. of Total)	United States Tourism (000s)	US Tourism (Shr. of Total)	Ratio of Shares (Region / 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, Athle	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).