

Nevada's Share of Employment and Personal Earnings within the Economic Regions

1.1 Purpose

This report presents a more detailed economic analysis of Northern and Southern Nevada within the context of their respective economic regions. While their percentage of population, GDP, and industrial real estate activity have been documented in the *Competitive Market Analysis*, a complete description of the structure of their economies and their percentages of earnings and employment within the larger Major Trade Areas (MTA) has not yet been documented.

The purpose of this report is to provide a deeper understanding of employment and personal earnings by two-digit North American Industry Classification System (NAICS) codes, or industry sectors, in the MTAs of San Francisco and Los Angeles MTAs. The analysis is intended to determine the industry focus and strengths of each MTA and the profile of Northern and Southern Nevada within them in order to define the potential impact that an improved freight system could have on each industry.

1.2 Economic Geography

The economic geography of the Western US has little relationship to the political geography. Economic regions are defined as market areas with interactive economic activities and are not defined by political boundaries. Economic geography is defined by Major Trade Areas (MTAs), which are anchored by major urban areas that form the primary economic concentrations and transportation hubs of larger areas with many smaller cities and towns. MTAs are named according to their major urban areas or anchors.

Within the Western US, only two of the ten MTAs, Phoenix and Seattle, are contained within a single state although they only cover a portion of each state and thus do not follow the political geography (see Figure 1). Of the remaining eight MTAs, each covers parts of more than one state: one is a two-state region, two are three-state regions, three are four-state regions and two are five-state regions.

While Nevada is one state from political point of view, it is divided into three different regions from an economic point of view. Parts of Nevada are contained within three MTAs: San Francisco, Los Angeles, and Salt Lake City. The Salt Lake City MTA includes only one Nevada County, White Pine County, located in Eastern Nevada. As this report is based on MSA data and there are no MSAs in White Pine County, there is no ability to include comparison of Eastern Nevada as defined within the economic geography as there is no equivalent data available.

As shown in Figure 1, each MTA is further divided into a set of Basic Trade Areas (BTAs). There is also a set of Combined Statistical Areas (CSAs) and MSAs. As data is not collected by BTA, employment and earnings data used for this analysis was collected by CSA and MSA to break the analysis into smaller economic units than the large MTAs. Each MTA was therefore subdivided into a set of economic sub-areas defined by a set of characteristics including location, level of internal interactions, geographic linkage, economic relationship, and data availability.

1.2.1 The San Francisco MTA: Northern California & Northern Nevada

The San Francisco MTA includes most of Northern California (one Northern California County is included in the Portland MTA) and all of Northern Nevada. There are 13 BTAs within the San Francisco MTA; one of which contains all of Northern Nevada and a portion of Northern California in the Lake Tahoe area.

The San Francisco MTA was divided into four economic sub-areas by MG&A according to the interactions and geographic proximity of the basic trade areas (see Figure 2). The four sub-areas are: the San Francisco region, Northern 99 Corridor, Other Northern California peripheral, and Northern Nevada.

The largest sub-area is the San Francisco region. This sub-area has one CSA, the San Jose-San Francisco-Oakland CSA, which contains 6 MSAs: San Francisco-Oakland-Hayward, San Jose-Sunnyvale-Santa Clara, Santa Rosa, Vallejo-Fairfield, Santa Cruz-Watsonville and Napa. As the San Jose-San Francisco-Oakland CSA includes the Stockton-Lodi MSA, which is identified as part of the 99 Corridor sub-area, it has been subtracted from the total of San Jose-San Francisco-Oakland CSA and reallocated to the Northern 99 Corridor sub-area.

The second sub-area is the Northern 99 Corridor; the central spine linking a set of statistical areas in the Central Valley area, including the Sacramento Valley in the North and the San Joaquin Valley in the South. The lower portion of the San Joaquin Valley is part of the Los Angeles MTA, while the remainder of the Central Valley is within the San Francisco MTA. The 99 Corridor sub-area in the San Francisco MTA includes 3 CSAs and 6 MSAs that are located on or around California State Route 99: Stockton-Lodi MSA, Sacramento-Roseville CSA, Fresno-Madera CSA, Salinas MSA, Modesto-Merced CSA, Visalia-Porterville MSA, Chico MSA, Yuba City MSA, and Hanford-Corcoran MSA.

Outside of the San Francisco region and Northern 99 Corridor is the third sub-area, Other Northern California peripheral, including California counties that are loosely linked and not closely tied to the primary economic sub-area. This sub-area contains two MSAs: Salinas and Redding.

Finally, the Northern Nevada sub-area contains one CSA, Reno-Carson City-Fernley, which combines two MSAs, Reno and Carson City, and the Micropolitan Statistical Areas adjacent to them.

1.2.2 Los Angeles MTA: Southern California, Southern Nevada & Northwest Arizona

The Los Angeles MTA contains 7 Basic Trade Areas and includes all of Southern California, all of Southern Nevada and a county in Northwest Arizona. All of Southern Nevada and a portion of Northwest Arizona comprise one BTA

The Los Angeles MTA was divided into five sub-areas by MG&A: the Los Angeles region, San Diego region, Southern 99 Corridor, Other Southern California peripheral, and Southern Nevada.

The Los Angeles region is the largest and densest component of the Los Angeles MTA. This sub-area is a continuous urbanized metropolis with a network that spreads across three MSAs: Los Angeles-Long Beach-Anaheim, Riverside-San Bernardino-Ontario, and Oxnard-Thousand Oaks-Ventura.

Immediately south of the L.A. region, the San Diego region includes the San Diego-Carlsbad and El Centro MSAs. Despite its close proximity to Los Angeles; it forms a distinct urban and economic sub-area within the Los Angeles MTA.

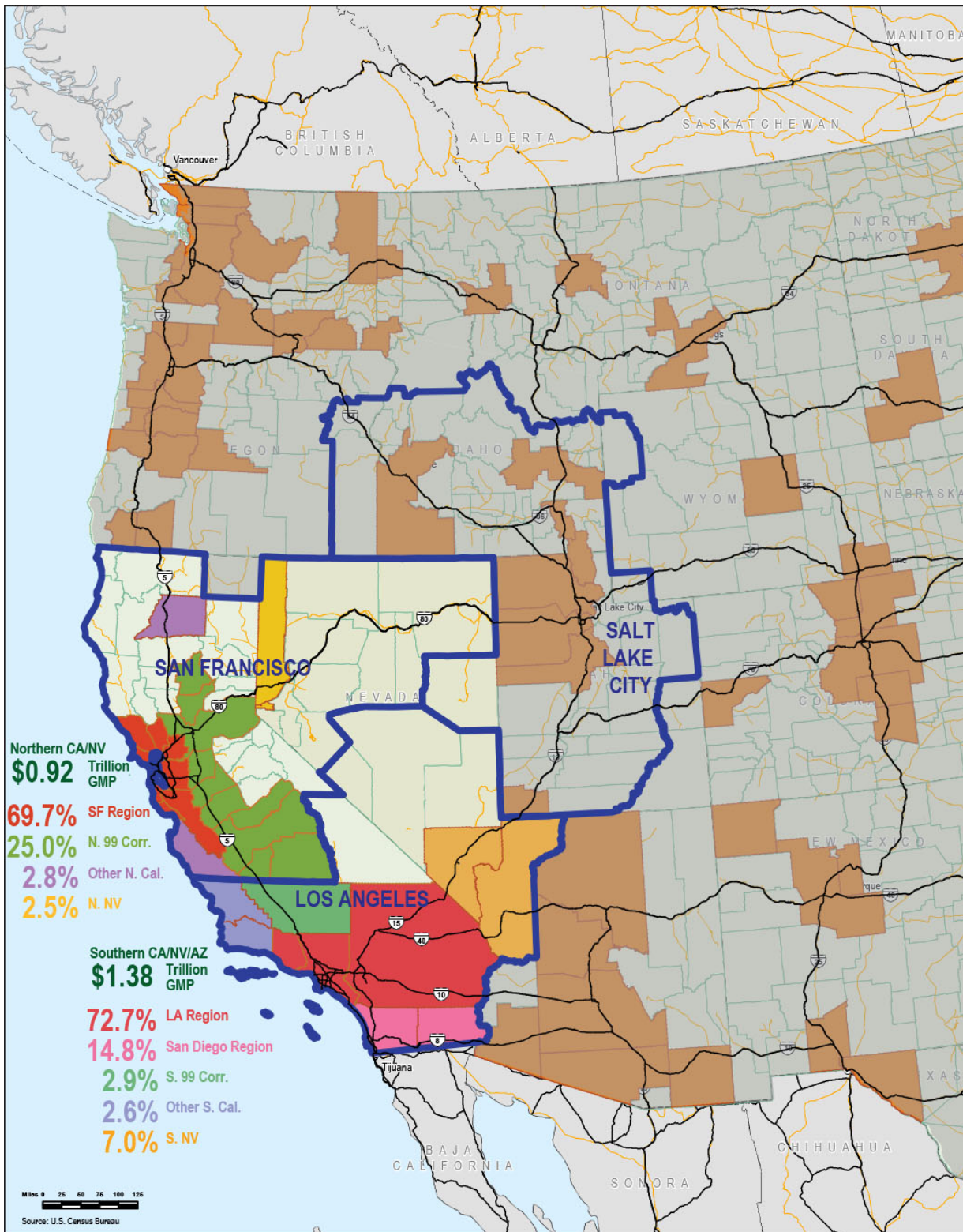
The Southern 99 Corridor sub-area includes the Bakersfield MSA, located near the L.A. region at the south end of the San Joaquin Valley. Access to the 99 Corridor from the L.A. region is difficult due to the need to pass over the Coast Range Mountains into the Valley. As a result, the areas north of Bakersfield are more closely tied to the San Francisco MTA because of the accessibility differentials between the core area of San Francisco and Los Angeles.

North of the L.A. region is the Other Southern California peripheral sub-area. This region is connected to but not an integrated part of the L.A. region and includes the Santa Maria-Santa Barbara and San Luis Obispo-Paso Robles-Arroyo MSAs.

The Southern Nevada BTA is used to define the Southern Nevada sub-area for analysis purposes within this study of earnings and employment. It extends across all of Southern Nevada and a part of Northwest Arizona. Within this sub-area are the Las Vegas-Henderson-Paradise MSA, connected to the L.A. region by the I-15 corridor, and the Lake Havasu City-Kingman MSA, connected to the L.A. region by the I-40 corridor.

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Figure 2: Sub-Areas within the Major Trade Areas



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- Major Trade Area (MTA)
- Counties outside of Metropolitan Areas
- Northern California Regions**
 - San Francisco Region
 - N. 99 Corridor
 - Other N. Cal.
- Southern California Regions**
 - Los Angeles Region
 - San Diego Region
 - S. 99 Corridor
 - Other S. Cal.
- Nevada Regions**
 - Northern Nevada (Reno CSA metro portion)
 - Southern Nevada (Las Vegas CSA metro portion)
- Outside of Study Area**
 - Metropolitan Areas
 - Counties outside of Metropolitan Areas

1.3 Data Strategy

1.3.1 Source Analysis

To assemble the necessary employment and earnings data, three sources were reviewed: 1) Nevada Governor's Office of Economic Development (GOED); 2) the Bureau of Labor Statistics (BLS); and 3) the Bureau of Economic Analysis (BEA).

The GOED data portal contains comprehensive statistics describing Nevada's economy at the county level. However, it does not include county level data for California, so the level of specificity was not available for the entire MTA to complete the data. GOED's data portal also contains a location comparison section which provides a selection of economic data describing a limited number of Metropolitan Statistical Areas (MSAs) in the Western US, including San Francisco and Los Angeles. However, it does not include all metros in California, so complete data about the Major Trade Areas could not be gathered from this source.

The BLS does not specify data to the two-digit NAICS level, which makes it impossible to make specific industry comparisons of earnings and employment data.

The earnings and employment data from the BEA also has its shortfalls within this analysis albeit to a lesser extent than the BLS and GOED. The most important is that the BEA avoids the disclosure of confidential information by not providing complete industry data at the MSA level for categories where the number of business fell below a minimum threshold. Thus, in order to gather a more comprehensive set of equivalent industry data for all sub areas within the MTAs, CSA data was used rather than MSA data as this level had far fewer missing data sets. Although the CSAs and MSAs do not include earnings and employment data for all of the counties or basic trade areas within the MTAs, they are more complete and comparable than the other data sources.

However, it should be noted that earnings and employment data is focused on the more urbanized and economically developed areas within the MTA, with the less urbanized rural counties not being fully included. Because the majority of economic activity and employment is concentrated in urban areas, the lack of data from the more rural areas does not create significant distortions in the comparisons of industry data.

In comparison to the BLS and GOED data sets, the BEA was found to contain the most complete and geographically refined earnings and employment data that allows for comparison of economic activities by industry across the MTAs. As a result, the Bureau of Economic Analysis was selected as the best data source for this analysis. All numbers outlined herein are directly from, or calculated from, the BEA 2013 datasets pertaining to employment and earnings (See Table 1 & 2, p. 18-21)

1.3.2 Missing Data

The BEA's MSA and CSA data was used to determine the earnings and employment characteristics of each sub-area in Nevada's three MTAs. As previously noted, the MSAs and CSAs do not cover the entire MTA; however, they are the best available data for comparing the sub-areas and understanding their size and relationship within the MTAs.

For each sub-area as defined within an MTA, MSA data for employment and personal earnings by NAICS code was collected from the Bureau of Economic Analysis (see Tables 1 & 2). As previously mentioned,

for MSAs with multiple industry values missing, CSAs were used instead because the availability of data increases at the broader geographic scale. However, some data cannot be retrieved even at this scale as it would violate the confidentiality of the companies. As a result, outcomes obtained from calculations including missing data are excluded from the analysis.

These missing data include: Mining (21), Utilities (22), and Wholesale Trade (42) in the Northern 99 Corridor sub-area; Mining (21) in the San Diego region sub-area; Management of Companies and Enterprises (55) in the Southern Nevada sub-area; and Utilities (22) and Transportation and Warehousing (48) in the Other Southern California peripheral sub-area.

1.3.3 Freight Dependent Industries

Of the 20 two-digit NAICS codes, eight are considered to be freight-dependent to different degrees, while 12 are not considered to be freight-dependent as they use the freight system to a much lesser degree. The eight freight-dependent industries identified are: Agriculture, Forestry, Fishing and Hunting (11), Mining (21), Utilities (22), Construction (23), Manufacturing (31), Wholesale Trade (42), Transportation and Warehousing (48), and Accommodation and Food Services (72). Companies classified under these industries depend on the freight system either to obtain raw materials from another region or to ship their final products to market.

Produce from the Agriculture, Forestry, Fishing and Hunting (11) and Mining (21) are bulk commodities, the companies in these industries depend on the freight transportation system to transport their goods to the next destination. Construction (23) depends on the freight transportation system to obtain the raw materials needed for construction. Wholesale Trade (42) depends on the freight transportation to coordinate and facilitate the movement of goods between manufacturers and distribution to retail outlets. In Accommodation and Food Services (72), the freight transportation system is especially important to the convention activity component as large scale displays that are required to be delivered, set up, broken down, and removed in short amounts of time depend on an efficient freight services.

1.4 The San Francisco MTA and Los Angeles MTA in the U.S. Context

The San Francisco MTA and Los Angeles MTA together represent a very high percentage of employment and earnings in the U.S. Within these two MTAs are two global gateways and transportation hubs, which have evolved very different types of economy as reflected in the employment and earnings characteristics.

There are a total of 22,700,302 people employed in the San Francisco MTA and Los Angeles MTA, representing 14.3% of total employment in the country. The highest level of employment is within the major metropolitan areas, with significant spillover employment in the sub-areas directly connected to the metropolitan areas. Other fringe areas that are not directly connected to the metropolitan centers have much fewer jobs as they remain primarily rural areas. Overall, Nevada's share of the MTA employment is a small but growing percentage.

The total personal earnings in these two MTAs is \$1.4 trillion, representing 15.3% of the total personal earnings in the country; a slightly higher percentage than for employment, indicating that the jobs may be higher wage than the nation as a whole. Average personal earnings are \$61,709 for the two MTAs

combined (see Appendices), while the average personal earnings for the U.S. is \$57,820. By comparison, the average personal earnings for the San Francisco MTA and Los Angeles MTA are 6.7% higher than the national average.

1.5 San Francisco MTA

There are a total of 8,484,225 jobs in the San Francisco MTA, which accounts for 5.4% of total employment in the United States. Of the four sub-areas within the San Francisco MTA, the San Francisco sub-area accounts for 58% of these jobs, while the 99 Corridor sub-area accounts for 34.3%, Northern Nevada sub-area accounts for 4%, and Other Northern California Peripheral accounts for 3.8% of the total employment in this MTA. Northern Nevada sub-area is the third largest employment sub-area within the San Francisco MTA.

Total personal earnings in the San Francisco MTA are \$586.4 billion, accounting for 6.4% of in the U.S. total. Relative to employment, this percentage is higher, meaning this MTA contains higher wage jobs. Within this MTA, the San Francisco region accounts for 67.5%, the Northern 99 Corridor accounts for 26.9%, Other Northern California peripheral accounts for 2.8%, and Northern Nevada accounts for 2.8% of the total personal earnings.

Average personal earnings are \$69,116 in the San Francisco MTA, which is 19.5% higher than the national average of \$57,820 and 20.7% higher than the Los Angeles MTA at \$57,288. Thus, the difference between Northern NV/CA and Southern NV/CA is significant.

The sub-area with highest average personal earnings in this MTA is the San Francisco region at \$80,510, which is 16.5% higher than the MTA average. Average personal earnings in the other three sub-areas, from highest to lowest, is \$54,246 in the Northern 99 Corridor, \$51,705 in Other Northern California Peripheral and 47,753 in Northern Nevada. Personal earnings in the Northern Nevada sub-area are 30.9% lower than the MTA average, and 40.7% lower than personal earnings in the San Francisco region. The gap between the highest and lowest personal earnings in this MTA is \$32,757.

1.5.1 Sub-Area Industry Analysis

Within the Major Trade Area, earnings and employment data were analyzed to determine which sub areas contained relatively higher or lower percentages in various industries. The point was not to determine the percentages within each sub area, but rather as a comparison between sub areas. For example, within the San Francisco region sub-area, 8.6% of employment is in Retail Trade (44) which is higher than in Manufacturing (31) at 7%; however, retail trade percentages in the remaining sub areas are higher than in the San Francisco region, while their manufacturing percentages are lower.

1.5.1.1 San Francisco Region

Compared to the other sub-areas within the San Francisco MTA, the San Francisco region has the highest employment percentage in five industries: Manufacturing (31), Information (51), Professional, Scientific, and Technical Services (54), Management of Companies and Enterprises (55) and Educational Services (61).

Within the San Francisco region sub-area, 7% of the total employment is in Manufacturing (31). This is around 100 basis points higher than Northern Nevada, 200 basis points higher than the Northern 99 Corridor, and 400 basis points higher than Other Northern California Peripheral.

Employment in Information (51) is another industry that the San Francisco region sub-area is much higher than the other sub areas, at 3.3% of the total employment, at three times the percentage of the other three sub-areas. The percentage of employment in Management of Companies and Enterprises (55) and Educational Services (61) are 1.6% and 2.8%, which are about two times the percentage for each within the other San Francisco MTA sub-areas.

Within the San Francisco region, the three two-digit NAICS categories with the highest average earnings are Information (51), Utilities (22), and Management of Companies and Enterprises (55), with average personal earnings of \$227,435, \$185,026, and \$161,639 respectively. Average personal earnings in the Information (51) industry in the San Francisco sub-area are more than twice that of Northern Nevada. The large employment in Information (51), multiplied by the high average personal earnings in this category has the effect of raising the entire average personal earnings in the San Francisco MTA. This masks the fact that average personal earnings are low in the rest of the sub-areas.

1.5.1.2 Northern 99 Corridor

Compared to the other sub-areas in the San Francisco MTA, The Northern 99 Corridor sub-area has the highest industry employment percentage in Health Care and Social Assistance (62), Other Services, Except Government (81) and Public Administration (92). The percentage of employment in Public Administration (92) is very high, accounting for 17.5% of the total employment, 200 basis points higher than Other Northern California Peripheral, 500 basis points higher than Northern Nevada and 800 basis points higher than the San Francisco region.

The three highest average personal earnings in the Northern 99 Corridor are \$151,685 in Utilities (22), \$98,396 in Information (51) and \$87,084 in Public Administration (92). The high employment and average personal earnings in Public Administration (92) makes this industry a large part of total personal earnings in the Northern 99 Corridor sub-area.

The earnings and employment data for the Northern 99 corridor is incomplete as no data is shown in the MSA for Mining (21), Utilities (22), and Wholesale Trade (42). All three are freight dependent industries, and as a result, the total figures and the total for freight dependent industries are lower than the actual amount of employment. As this corridor is continuous as a major distribution corridor serving the California and Nevada markets, the missing data poses a significant problem for fully accurate analysis.

1.5.1.3 Other Northern California Peripheral

Compared to the other sub-areas in the San Francisco MTA, the Other Northern California Peripheral sub-area has the highest industry employment percentage in Agriculture, Forestry, Fishing and Hunting (11), which accounts for 15.9% of the employment. The percentages in this industry are around 1% for San Francisco sub-area and Northern Nevada sub-area and 5% for the 99 Corridor sub-area.

The three highest average personal earnings in the Other Northern California Peripheral sub-area are \$143,482 in Utilities (22), \$96,958 in Wholesale Trade (42) and \$86,622 in Public Administration (92). Average personal earnings for Wholesale Trade (42) in this sub-area is the second highest within the MTA and is only slightly lower than the San Francisco Region sub-area at \$100,391.85.

1.5.1.4 Northern Nevada

In comparison to the other sub-area within the San Francisco MTA, the Northern Nevada sub-area has the highest industry employment percentage in Construction (23), Retail Trade (44), Transportation and

Warehousing (48), Finance and Insurance (52), Real Estate and Rental and Leasing (53), Administrative and Waste Management Services (56), Arts, Entertainment, and Recreation (71) and Accommodation and Food Services (72).

The Northern Nevada sub-area has a much higher percentage of employment in Transportation and Warehousing (48), which accounts for 4.5% of the employment, compared to the 2.9% for the MTA. This sub-area also has a much higher percentage of employment in Accommodation and Food Services (72), which accounts for 11.7% of the total employment, compared to the 7.2% for the MTA.

However, Northern Nevada has a low comparative percentage of employment in Information (51) and Educational Services (61), each of them accounting for 1% of the total employment, only half of the percentage for the MTA. Another industry that the Northern Nevada sub-area has a relatively low percentage of employment in is the Professional, Scientific, and Technical Services (54), which accounts for only 6.2% while the MTA average is 9.5%. The industry with the highest employment in Northern Nevada is Public Administration (92), which accounts for 12.7% of the total employment in the sub-area. The next two highest employment percentage industries are Accommodation and Food Services (72) and Retail Trade (44), accounting for 11.7% and 10.4% of the total employment, respectively.

The highest three industries in terms of average personal earnings in the Northern Nevada sub-area are \$131,283 in Utilities (22), \$96,772 in Management of Companies and Enterprises (55), and \$77,228 in Public Administration (92). Most of the industries in Northern Nevada have lower average personal earnings than the MTA averages.

1.6 Los Angeles MTA

There are a total of 14,216,077 jobs in the Los Angeles MTA, which accounts for 9% of total employment in the US. Of the total employment within Los Angeles MTA, the Los Angeles region sub-area accounts for 71.7%, San Diego region sub-area accounts for 14.2%, Southern Nevada sub-area at 8.3%, Southern 99 Corridor sub-area accounts for 2.8%, and Other Southern California Peripheral at 3%.

Compared to the U.S., the Los Angeles MTA has a higher percentage of employment in Agriculture, Forestry, Fishing and Hunting (11), Information (51), Real Estate and Rental and Leasing (53), Arts, Entertainment, and Recreation (71), and Accommodation and Food Services (72) and a lower employment percentage in Health Care and Social Assistance (62) and Public Administration (92). Percentages of employment in the rest of the 2-digit NAICS industries are close to the national average.

Total personal earnings in the Los Angeles MTA are \$814.4 billion, of which the L.A. region sub-area accounts for 72.4%, the San Diego sub-area accounts for 15%, the Southern 99 Corridor sub-area accounts for 2.9%, Other Southern California Peripheral accounts for 2.7%, and Southern Nevada accounts for 7%. The Los Angeles MTA represents 8.9% of total personal earnings in the US.

Compared to the U.S., the Los Angeles MTA has a higher percentage of personal earnings in: Agriculture, Forestry, Fishing and Hunting (11), Retail Trade (44), Information (51), Real Estate and Rental and Leasing (53), Arts, Entertainment, and Recreation (71), Accommodation and Food Services (72), and Public Administration (92), while the remaining 2-digit NAICS industries have percentages close to the national average.

Average personal earnings are \$57,288 in the Los Angeles MTA, which is very close to the national average of \$57,820. The highest average personal earnings within this MTA by sub-area are \$60,843.15 in the San Diego region, which is 6.21% higher than the MTA average. Average personal earnings for the other four sub-areas from highest to lowest are: \$58,544 in the Southern 99 Corridor sub-area, \$5,7810 in the L.A. region sub-area, \$51,673 in the Other Southern California Peripheral sub-area and \$48,322 in the Southern Nevada sub-area. The personal earnings for Southern Nevada sub-area are 15.7% lower than the MTA average. It also shows that the personal earnings for Northern Nevada are 20.6% lower than the personal earnings for San Francisco sub-area. The gap between the highest and lowest personal earnings in this MTA is \$12,521. The gap in Los Angeles MTA is smaller than the gap in San Francisco MTA.

Average personal earnings in the Los Angeles MTA are 17.1% lower than average personal earnings in the San Francisco MTA. However, total employment in the Los Angeles MTA is much higher, which makes the Los Angeles MTA a larger economy body, and thus it has a larger influence.

1.6.1 Sub-Area Industry Analysis

1.6.1.1 Los Angeles Region

Compared to the other sub-areas in the Los Angeles MTA, the L.A. Region has the highest industry employment percentage in Manufacturing (31), Wholesale Trade (42), Information (51), Administrative and Waste management services (56), Health care and Social Assistance (62), Arts, Entertainment, and Recreation (71) and Other Services, Except Government (81). This is especially true in Wholesale Trade (42), which accounts for 4.4% of the employment in the L.A. Region; twice the percentage in each of the other four sub-areas. The percentage of employment in Information (51) is 2.5%, which is also twice the percentage in the other MTA sub-areas.

The three highest average personal earnings industries in the L.A. region are \$145,171 in Utilities (22), \$118,401 in Information (51), and \$107,858 in Management of Companies and Enterprises (55). The L.A. sub-area has the three highest average personal earnings in the same three industries as San Francisco sub-area, but earnings are lower in the L.A. sub-area.

1.6.1.2 San Diego Region

Compared to the other sub-areas in the Los Angeles MTA, the San Diego region sub-area has the highest industry employment percentage in Professional, Scientific, and Technical Services (54), Educational Services (61) and Public Administration (92). In all of these three industries, the percentage of employment is much higher than each of the other four sub-areas.

In the San Diego region, the three industries with the highest average personal earnings are \$168,311 in Utilities (22), \$129,506 in Management of Companies and Enterprises (55) and \$94,668 in Information (51). The San Diego region has the highest average personal earnings in the same three industries as the L.A. sub-area. However, in the San Diego sub-area, average personal earnings in Management of Companies and Enterprises (55) are higher than in Information (51), while in the L.A. sub-area, it is the opposite.

1.6.1.3 Southern 99 Corridor

Compared to the other sub-areas in the Los Angeles MTA, the Southern 99 Corridor sub-area has the highest industry employment percentage in Agriculture, Forestry, Fishing and Hunting (11), and

Construction (23). The percentage of employment in in Agriculture, Forestry, Fishing and Hunting (11) for 99 Corridor is extremely high, at 14.6%, with the second highest in this industry being 6.2% in the Other Southern California Peripheral subarea and less than 1% in the other three areas.

In 99 Corridor, the three highest average personal earnings are \$142,532 in Utilities (22), \$92,131 in Management of Companies and Enterprises (55) and \$84,423 in Public Administration (92).

1.6.1.4 Other Southern California Peripheral

Of the five sub-areas, the Other Southern California Peripheral sub-area has a close-to-highest percentage of employment in Construction (23) and Other Services, Except Government (81), which account for 5.3% and 6.2% of the total employ in this sub-area respectively.

The three highest industries in terms of average personal earnings in the Other Southern California sub-area are \$105,504 in Utilities (22), \$102,513 in Management of Companies and Enterprises (55), and \$82,028 in Public Administration (92).

1.6.1.5 Southern Nevada

Compared to the other sub-areas in the Los Angeles MTA, the Southern Nevada sub-area has the highest industry employment percentage in Retail Trade (44), Finance and Insurance (52), Real Estate and Rental and Leasing (53), Management of Companies and Enterprises (55), and Accommodation and Food Services (72).

In Southern Nevada, 22% of employment is in Accommodation and Food Services (72), which is much higher than the other four sub-areas. Moreover, Southern Nevada area has an exceptionally low percentage of personal earnings in Manufacturing (31), Wholesale Trade (42), Information (51), Finance and Insurance (52), Professional, Scientific, and Technical Services(54), and Educational Services (61).

The three industries with the highest average personal earnings in Southern Nevada sub-area are \$135,677 in Utilities (22), \$122,350 in Management of Companies and Enterprises (55), and \$79,558 in Public Administration (92). In Southern Nevada sub-area, average personal earnings in Accommodation and Food Services (72) is \$41,879, which is not the highest among the 20 two-digit NAICS industry categories, but it is twice as much as that in the other Los Angeles MTA sub-areas.

1.7 Freight Dependent Industry Analysis

As previously mentioned, eight of the 20 2-digit NAICS codes are considered to be freight-dependent to different degrees: Agriculture, Forestry, Fishing and Hunting (11), Mining (21), Utilities (22), Construction (23), Manufacturing (31), Wholesale Trade (42), Transportation and Warehousing (48), and Accommodation and Food Services (72). This section seeks to determine the percentages of freight-dependent jobs and their relative earnings within the MTAs and their sub-areas.

1.7.1 San Francisco MTA

In the San Francisco MTA, approximately 27% of jobs are in freight-dependent industries. This total differs by sub area, with Other Northern California Peripheral having the most jobs in freight dependent industries at 36.5%, followed by Northern Nevada at 32%, Northern 99 Corridor sub-area at 27% and San Francisco region at 26%. The actual percentage in the Northern 99 Corridor sub-area is larger than found in this analysis because employment data is not available for Mining (21), Utilities (22) and Wholesale Trade (42).

In the San Francisco MTA, average personal earnings in freight-dependent industries are approximately \$69,089. Once again, this number varies by sub-area, with the average being \$83,368 in the San Francisco region, \$55,687 in the Northern 99 Corridor, \$51,411 in the Other Northern California Peripheral sub-area and \$49,355 in Northern Nevada.

1.7.2 Los Angeles MTA

In the Los Angeles MTA, 27.7% of jobs are in freight-dependent industries: slightly higher than in the San Francisco MTA. Again, this total differs by sub-area, with the Southern 99 Corridor employing 40.4% of workers in freight dependent industries, followed by Southern Nevada at 35.4%, Other Southern California Peripheral with 29.5%, the San Diego region at 23.8%, and the Los Angeles region at 27%. It is important to note that data is not available for Mining (21) in the San Diego region sub-area; Utilities (22) and Transportation and Warehousing (48) in the Other Southern California Peripheral sub-area. As a result, the actual percentage is higher than listed. However, based on the available data, Southern Nevada sub-area has the second highest employment percentage in freight dependent industries within the Los Angeles MTA.

In the Los Angeles MTA, average personal earnings in freight-dependent industries are approximately \$61,685. As expected, this number varies by sub-area, with those in the Southern 99 corridor being of the highest wage at an average of \$67,077, followed by the San Diego region at \$59,678, Los Angeles Region at \$59,188, Southern Nevada at \$50,080, and \$49,743 for Other Southern California Peripheral. Personal earnings data is also incomplete for the same industries and subareas as indicated above in the employment data. As a result, there is difference between the actual average personal earnings and calculated average personal earnings in the freight-dependent industries.

1.7.3 Northern and Southern Nevada

Based on available data for the San Francisco MTA, Northern Nevada has the second highest total percentage of employment in industries that highly dependent on freight transportation system. Although almost one-third of the regions' employment is in freight-dependent industries, Northern Nevada has the lowest average personal earnings in freight-dependent industries, 29.6% lower than the MTA average and 19.5% lower than the national average.

Based on available data, Southern Nevada also has the second highest total percentage of employment in freight-dependent industries within the Los Angeles MTA. With over a third of employment in freight dependent industries, the average personal earnings in Southern Nevada are 14.1% lower than the MTA average and 18.3% lower than the national average.

Thus, Southern Nevada has a slightly higher percentage of employment in freight dependent industries than Northern Nevada, at 35.4% and 32%, respectively. Average personal earnings the Nevada sub-areas are also very similar, with Southern Nevadans earning \$50,080 and Northern Nevadans earning \$49,355.

1.8 Conclusions

Despite Nevada being one state politically, it is divided into three different economic regions, or MTAs, within the national economy. Each of the three MTAs has a different type and structure of economic activity and contains multiple sub-areas, one of which is part of Nevada and others that are parts of an adjoining state or states. Each sub-area has its own specific pattern and structure of economic activity. As a result, it is important to recognize the economic pattern and structure of the Nevada sub-areas in

comparison to the other sub-areas within their MTAs as well as to the overall economy of their MTA. Understanding the uniqueness of economic activity within the MTAs and within each of Nevada's sub-areas provides the framework for understanding the type of infrastructure investments that can have the greatest impact on growing Nevada's economy.

1.8.1 Basic Employment Characteristics

There are four basic employment characteristics that need to be understood as the foundation for infrastructure investments that can grow economic activity. The first is the share of employment and earnings that each of the Nevada sub-areas contain relative to their MTA they are located within. The second and third are to understand the similarities and differences between the employment characteristics in Northern and Southern Nevada. The fourth is to compare the individual categories in the two sub-areas.

1.8.1.1 Relative Nevada sub-areas share of MTA employment

Both the Northern and Southern Nevada sub-areas have a relatively small share of employment within their respective MTAs. The Northern Nevada sub-area holds only 4% of the employment within San Francisco MTA, while the Southern Nevada sub-area holds 8.3% of total employment within the Los Angeles MTA. Thus, the Southern Nevada sub-area contains a larger share of employment within its MTA, more than double that of Northern Nevada's share.

1.8.1.2 Similarities and differences in Nevada sub-areas employment profiles

The Northern and Southern Nevada sub-areas have many similarities in their employment characteristics among the twenty two-digit NAICS code categories and some notable exceptions. The top three employment categories in the Northern Nevada sub-area each contain over 10% of the region's total employment: Public Administration (92) at 12.7%, Accommodation and Food Services (72) at 11.7%, and Retail Trade (44) at 10.4%. Six employment categories contain over 5%: Health Care and Social Assistance (62), Professional, Scientific, and Technical Services (54), Administrative and Waste Management Services (56), Real Estate and Rental and Leasing (53), Manufacturing (31), and Finance and Insurance (52). The remaining eleven categories contain fewer than 5% of the region's total employment.

The top industries in the Southern Nevada sub-area are the same three as Northern Nevada. However, in Southern Nevada, Accommodation and Food Services (72) accounts for almost 22%; a much larger share than in Northern Nevada where Accommodation ranks second at near half of the Southern Nevada percentage. This reveals the high degree of specialization and lack of diversity within Southern Nevada's economy. The other two top-three employment categories have relatively similar shares as Northern Nevada with Retail Trade (44) at 10.8% and Public Administration (92) at 10%. Another five employment categories have over 5% of Southern Nevada's total employment, unlike Northern Nevada, which has six over the same percentage. However, these five are also over 5% in Northern Nevada: Health Care and Social Assistance (62), Administrative and Waste Management Services (56), Real Estate and Rental and Leasing (53), Finance and Insurance (52) and Professional, Scientific, and Technical Services (54). The missing category over 5% in Southern Nevada is Manufacturing (31), which has only 2.3% in the region, less than half of that found in Northern Nevada.

Thus, although Northern and Southern Nevada have very similar percentages in 18 of the 20 NAICS code categories, there are two important exceptions. The Northern Nevada sub-area has more than double

the percentage of employment in Manufacturing (31) in comparison to Southern Nevada and the Southern Nevada sub-area has nearly double the percentage of employment in Accommodation and Food Services (72) in comparison to Northern Nevada.

1.8.1.3 Comparison of Nevada Sub-areas' Employment Profiles

Comparing Northern Nevada and Southern Nevada sub-area, Northern Nevada sub-area has a higher percentage of employment in Agriculture, Forestry, Fishing and Hunting (11), Mining (21), Wholesale Trade (42), Transportation and Warehousing (48) and Public Administration (92), and has a slightly higher percentage of employment in Professional, Scientific, and Technical Services (54), Educational Services (61), Health Care and Social Assistance (62), and Arts, Entertainment, and Recreation (71).

Southern Nevada has a slightly higher percentage of employment in Information (51), Real Estate and Rental and Leasing (53) and Administrative and Waste Management Services (56). Both Northern Nevada sub-area and Southern Nevada sub-area have an almost the same percentage of employment in Utilities (22), Construction (23), Retail Trade (44), Finance and Insurance (52), Management of Companies and Enterprises (55), and Other Services, Except Government (81).

As previously mentioned, the Northern Nevada sub-area doubles the percentage of employment in Manufacturing (31) in comparison to the Southern Nevada sub-area and Southern Nevada doubles the percentage of employment in Accommodation and Food Services (72) in comparison to Northern Nevada.

1.8.2 Basic Earnings Characteristics

1.8.2.1 Relative Nevada Shares of MTA Earnings

The Northern and Southern Nevada sub-areas have some similarities in their earnings characteristics, but their relationship to the MTAs they located in are very different. The average personal earnings in the Northern and Southern Nevada sub-areas are very similar, with a difference of only \$569: \$47,753 in Northern Nevada and \$48,322 in Southern Nevada. However, because the average personal earnings are much higher in the San Francisco MTA than in the Los Angeles MTA, the Nevada comparisons to California differ greatly. The average personal earnings in Northern Nevada are 30.9% lower than the San Francisco MTA average, while the average personal earnings in Southern Nevada are only 15.7% lower than the Los Angeles MTA average. Thus, the gap between Nevada sub-areas and their respective MTA is larger for Northern Nevada than for Southern Nevada.

1.8.2.2 Similarities & Differences in Nevada sub-area Earnings Profiles

In the Northern Nevada sub-area, the highest average personal earnings are in Utilities (22) at \$131,282, Management of Companies and Enterprises (55) at \$96,772, and Public Administration (92) at \$77,227. In the Southern Nevada sub-area, the same three two-digit NAICS categories have the highest average personal earnings in the same ranking order but with different values: Utilities (22) at \$135,677, Management of Companies and Enterprises (55) at \$122,349, and Public Administration (92) at \$79,558. Thus, the average personal earnings of each of these categories are higher in Southern Nevada than in Northern Nevada.

Aside from these top three industries, average personal earnings in Northern Nevada are 20% or more higher than the overall Northern Nevada average in the following two-digit NAICS code categories: Wholesale Trade (42) at \$72,875, Manufacturing (31) at \$64,206, Mining (21) at \$58,790, Health Care

and Social Assistance (62) at \$58,509, Construction (23) at \$57,330, and Professional, Scientific, and Technical Services (54) at \$57,201.

Aside from these top three industries, average personal earnings in Southern Nevada are 20% or more higher than the overall Southern Nevada average in the following two-digit NAICS code categories: Wholesale Trade (42) at \$71,820, Professional, Scientific, and Technical Services (54) at \$68,150, Health Care and Social Assistance (62) at \$57,540, Construction (23) at \$65,581 Manufacturing (31) at \$61,853, and Information (51) at \$58,555.

These relatively high earning industry categories are similar in both Northern and Southern Nevada, except for in Mining (21) and Information (51). Earnings in Mining (21) are almost 50% lower than overall average earnings in Southern Nevada, while they are 23% higher in Northern Nevada. Earnings in Information (51) are more than 20% higher than the overall average in Southern Nevada, while they are only 10% higher than the overall average in Northern Nevada.

1.8.2.3 Comparison of Nevada Sub-areas' Earnings Profiles

Comparing Northern to Southern Nevada, the Northern Nevada sub-area has higher (15% or more) average personal earnings than the Southern Nevada sub-area in Mining (21) by 136%, Agriculture, Forestry, Fishing and Hunting (11) by 52%, and Finance and Insurance (52) by 19%. The Southern Nevada sub-area has higher (15% or more) average personal earnings than the Northern Nevada sub-area in Arts, Entertainment, and Recreation (71) by 62%, Accommodation and Food Services (72) by 40%, Management of Companies and Enterprises (55) by 26%, Professional, Scientific, and Technical Services by 19%, and (54) Real Estate and Rental and Leasing (53) by 19%.

1.8.3 Freight Dependencies

Nevada has a high degree of economic dependency on freight-dependent industries as shown by the fact that both the Northern Nevada and Southern Nevada sub-areas have a high percentage of employment in freight-dependent industries then their MTA total percentages. Northern Nevada sub-area has 32% of its employment and 33.2% of its personal earnings in freight-dependent industries. Southern Nevada sub-area has 35.4% of its employment and 36.6% of its personal earnings in freight-dependent industries. Thus, the state has a high economic dependency on freight-dependent industries.

1.8.3.1 Employment to Earnings Relationships

However, in contrast to the high percentage of employment in freight-dependent industries, the average personal earnings in freight-dependent industries are low in both Northern and Southern Nevada. The average personal earnings in freight-dependent industry categories are \$49,355 in the Northern Nevada sub-area and \$50,080 in the Southern Nevada sub-area. The gap between Northern Nevada and the San Francisco MTA is much larger than that between Southern Nevada and the Los Angeles MTA, at 30.1% lower and 14.1% lower, respectively.

1.8.3.2 Share of Respective MTAs

The Northern Nevada sub-area is located in the same MTA as the San Francisco region, a well-developed and affluent sub-area and a world leader in Technology. The San Francisco MTA, compared to Los Angeles MTA, is also leading in personal earnings. However, Northern Nevada has a small share of the total economy of San Francisco MTA. In contrast, Los Angeles is a large employment region although not as affluent as San Francisco MTA, the Southern Nevada sub-area takes a larger share of the total

economy of the Los Angeles MTA. It also indicates that the Northern Nevada sub-area has huge potential to grow and diversify to become a more competitive economic region if it can capture a larger share of employment and earnings within the San Francisco MTA.

1.8.3.3 High Degree of Dependency

Both the Northern Nevada and Southern Nevada sub-areas have a high dependency on freight-dependent industries. As a result, an improved freight system with better connectivity between these two sub-areas and the dominant economy within their respective MTAs could be extremely beneficial for both Northern and Southern Nevada. These two sub-areas can and should become more integrated parts of their respective MTAs in order to capture a larger share of economies and develop a competitive advantage in the global and Western US marketplace

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Table 1: Total Full-Time and Part-Time by NAICS Industry and Major Trade Area (Sub-areas)

Source: Bureau of Economic Analysis, 2013

Area	Sub-Area	Total Employed	2-Digit NAICS Industry Code																			Total Freight Dependent	
			11	21	22	23	31	42	44	48	51	52	53	54	55	56	61	62	71	72	81		92
San Francisco Major Trade Area: Northern California & Nevada																							
San Jose-San Francisco-Oakland, CA (CSA) minus Stockton	S.F.	4,917,896	37,729	11,478	14,137	228,161	344,746	155,735	422,425	122,036	161,131	249,419	270,724	614,378	76,169	296,275	139,649	529,273	132,760	358,645	265,796	487,230	1,272,667
Stockton-Lodi, CA (MSA)	N. 99	286,296	18,415	473	1,341	13,031	19,150	12,866	31,715	18,671	2,498	10,999	14,416	9,861	1,840	16,969	5,782	33,660	3,969	17,820	16,238	36,582	101,767
Sacramento-Roseville, CA (CSA)	N. 99	1,351,792	21,290	(D)	2,959	74,576	43,163	33,946	132,170	36,416	18,382	71,459	76,684	96,771	13,736	83,528	23,056	150,934	32,352	88,371	77,386	270,987	300,721
Fresno-Madera, CA (CSA)	N. 99	521,483	25,789	(D)	2,403	21,024	29,152	17,372	49,227	16,875	5,139	20,490	21,330	19,607	3,191	30,906	6,328	67,917	6,557	30,946	30,025	76,371	143,561
Salinas, CA (MSA)	Other N. CA	233,000	49,062	680	891	7,887	6,259	6,381	20,492	4,518	2,153	6,089	10,048	11,045	1,141	9,119	3,268	18,876	5,041	21,003	12,162	36,885	96,681
Modesto-Merced, CA (CSA)	N. 99	319,863	18,539	(D)	(D)	13,779	30,094	(D)	36,127	13,728	1,761	9,462	13,921	11,358	2,693	15,264	2,921	39,820	4,056	20,575	17,546	44,321	96,715
Visalia-Porterville, CA (MSA)	N. 99	193,397	38,478	204	634	6,752	12,262	4,914	20,734	7,573	1,135	5,808	7,387	4,979	891	10,824	1,825	15,190	1,03	10,268	10,180	31,656	81,085
Chico, CA (MSA)	N. 99	106,538	4,740	228	567	5,308	4,859	2,254	12,517	1,659	1,329	3,674	5,157	5,631	855	5,064	1,263	18,279	2,048	7,609	8,269	15,228	27,224
Yuba City, CA (MSA)	N. 99	72,300	6,233	372	(D)	2,998	2,628	(D)	7,643	2,08	570	2,048	3,799	2,728	802	3,481	572	8,115	1,331	4,227	3,878	16,226	19,166
Hanford-Corcoran, CA (MSA)	N. 99	56,488	6,965	204	92	1,294	4,650	769	5,184	1,297	236	1,051	1,471	1316	117	1,211	421	6,543	404	3,050	2,432	17,781	18,321
Redding, CA (MSA)	Other N. CA	87,939	1,811	(D)	404	4,817	2,894	2,096	11,202	2,289	904	3,713	4,533	4,521	888	4,592	1,149	14,269	1,763	6,186	5,828	12,783	20,497
Reno-Carson City-Fernley, NV (CSA)	N. NV	337,233	2,033	3,219	789	16,602	19,920	10,932	35,035	15,300	3,429	19,074	20,075	20,902	4,988	20,680	3,453	30,046	11,571	39,277	16,333	42,820	108,072
MTA Total	5.35%	8,484,225	231,084	16,858	24,217	396,229	519,777	247,265	784,471	243,070	198,667	403,286	449,545	803,097	107,311	497,913	189,687	932,922	203,555	607,977	466,073	1,088,870	2,286,477
Industry Percentage			2.72%	0.20%	0.29%	4.67%	6.13%	2.91%	9.25%	2.86%	2.34%	4.75%	5.30%	9.47%	1.26%	5.87%	2.24%	11.00%	2.40%	7.17%	5.49%	12.83%	26.95%
S.F. Metro	58%	4,917,896	37,729	11,478	14,137	228,161	344,746	155,735	422,425	122,036	161,131	249,419	270,724	614,378	76,169	296,275	139,649	529,273	132,760	358,645	265,796	487,230	1,272,667
Industry %			0.77%	0.23%	0.29%	4.64%	7.01%	3.17%	8.59%	2.48%	3.28%	5.07%	5.50%	12.49%	1.55%	6.02%	2.84%	10.76%	2.70%	7.29%	5.40%	9.91%	25.88%
99 Corridor	34.3%	2,908,157	140,449	1,481	7,996	138,762	145,958	72,121	295,317	98,927	31,050	124,991	144,165	152,251	24,125	167,247	42,168	340,458	52,420	182,866	165,954	509,152	788,560
Industry Percentage			4.83%	0.05%	0.27%	4.77%	5.02%	2.48%	10.15%	3.40%	1.07%	4.30%	4.96%	5.24%	0.83%	5.75%	1.45%	11.71%	1.80%	6.29%	5.71%	17.51%	27.12%
Other N. CA	3.78%	320,939	50,873	680	1,295	12,704	9,153	8,477	31,694	6,807	3,057	9,802	14,581	15,566	2,029	13,711	4,417	33,145	6,804	27,189	17,990	49,668	117,178
Industry %			15.85%	0.21%	0.40%	3.96%	2.85%	2.64%	9.88%	2.12%	0.95%	3.05%	4.54%	4.85%	0.63%	4.27%	1.38%	10.33%	2.12%	8.47%	5.61%	15.48%	36.51%
North NV	3.97%	337,233	2033	3,219	789	16,602	19,920	10,932	35,035	15,300	3,429	19,074	20,075	20,902	4,988	20,680	3,453	30,046	11,571	39,277	16,333	42,820	108,072
Industry %			0.60%	0.95%	0.23%	4.92%	5.91%	3.24%	10.39%	4.54%	1.02%	5.66%	5.95%	6.20%	1.48%	6.13%	1.02%	8.91%	3.43%	11.65%	4.84%	12.70%	32.05%
U.S. (Metro)		158,497,018	571,241	1,021,408	460,989	7,910,615	10,260,926	5,719,548	15,809,294	5,193,778	3,030,326	9,036,709	7,206,544	11,688,157	2,141,158	10,351,115	3,894,186	18,214,829	3,720,984	11,484,584	9,223,062	20,277,118	42,623,089
Industry %			0.36%	0.64%	0.29%	4.99%	6.47%	3.61%	9.97%	3.28%	1.91%	5.70%	4.55%	7.37%	1.35%	6.53%	2.46%	11.49%	2.35%	7.25%	5.82%	12.79%	26.89%

Table 1: Total Full-Time and Part-Time by NAICS Industry and Major Trade Area (Sub-areas)

Source: Bureau of Economic Analysis, 2013

Los Angeles Major Trade Area: Southern California & Nevada, Eastern Arizona																							
Los Angeles-Long Beach-Anaheim, CA (MSA)	L.A.	7,960,945	11,245	22,081	16,645	304,703	568,364	367,143	696,548	242,049	271,547	429,868	498,383	681,359	91,441	564,970	19,2932	915,442	285,072	554,290	527,323	719,540	2,086,520
San Diego-Carlsbad, CA (MSA)	S.D.	1,935,464	15,258	4,660	7,057	88,654	104,486	57,036	176,144	31,437	30,717	92,845	117,145	197,153	21,686	119,937	46,075	179,772	49,884	151,941	114,679	328,898	460,529
Riverside-San Bernardino-Ontario, CA (MSA)	L.A.	1,795,498	18,674	3,552	5,882	109,203	97,689	69,115	208,168	98,351	15,956	66,624	101,398	80,262	9,526	141,371	24,473	204,869	33,895	129,129	121,794	255,567	531,595
Las Vegas-Henderson-Paradise, NV (MSA)	S.NV	1,121,180	571	3,169	2,738	51,917	23,561		117,688	40,335	13,572	64,497	75,384	58,512	18,011	80,532	9,877	83,444	35,811	254,716	52,149	110,064	401,639
Oxnard-Thousand Oaks-Ventura, CA (MSA)	L.A.	438,876	26,242	2,584	1,158	20,332	32,550	16,055	48,093	6,759	7,007	27,019	24,271	31,991	2,135	28,256	7,832	419,65	11,239	30,488	25,217	47,683	136,168
Bakersfield, CA (MSA)	S. 99	401,231	58,749	15,201	1,484	23,835	15,675	11,272	37,100	13,330	3,159	11,719	15,453	18,145	3,621	20,767	2,835	38,715	4,794	22,435	22,192	60,750	161,981
Santa Maria-Santa Barbara, CA (MSA)	Other S. CA	262,261	19,196	2,029	339	11,631	13,793	5,885	23,364	3,957	5,395	8,354	14,731	21,726	2,156	15,935	4,795	25,723	7,128	22,915	15,420	37,789	79,745
San Luis Obispo-Paso Robles-Arroyo Grande, CA (MSA)	Other S. CA	159,647	7,066	625	(D)	10,529	6,573	3,546	17,903	(D)	1,926	5,947	10,635	11,096	655	9,421	1,658	15,481	3,989	16,204	10,592	20,995	44,543
El Centro, CA (MSA)	S.D.	78,116	3173	(D)	486	2,619	2,927	2,381	10,326	2,705	414	1,772	2,050	1,983	492	2,928	523	9,313	389	4,071	4,224	17,945	18,362
Lake Havasu City-Kingman, AZ (MSA)	S. NV	62,859	622	741	465	3,566	3,090	976	9,787	1,968	838	2,136	4,183	2,056	(D)	3,846	664	8,476	1,160	5,509	4,151	8,356	16,937
Total	8.97%	14,216,077	160,796	54,642	36,254	626,989	868,708	558,041	1,345,121	440,891*	350,531	710,781	863,633	1,104,283	149,723 *	987,963	291664	1,523,200	433,361	1,191,698	897,741	1,607,587	3,938,019
Industry %			1.13%	0.38%	0.26%	4.41%	6.11%	3.93%	9.46%	3.10%	2.47%	5.00%	6.08%	7.77%	1.05%	6.95%	2.05%	10.71%	3.05%	8.38%	6.31%	11.31%	27.70%
LA metro	71.7%	10195319	56,161	28,217	23,685	434,238	698,603	452,313	952,809	347,159	294,510	523,511	624,052	793,612	103,102	734,597	225,237	1,162,276	330,206	713,907	674,334	1,022,790	2,754,283
Industry %			0.55%	0.28%	0.23%	4.26%	6.85%	4.44%	9.35%	3.41%	2.89%	5.13%	6.12%	7.78%	1.01%	7.21%	2.21%	11.40%	3.24%	7.00%	6.61%	10.03%	27.02%
San Diego	142%	2013580	18,431	4,660	7,543	91,273	107,413	59,417	186,470	34,142	31,131	94,617	119,195	199,136	22,178	122,865	46,598	189,085	50,273	156,012	118903	346,843	478,891
Industry Percentage			0.92%	0.23%	0.37%	4.53%	5.33%	2.95%	9.26%	1.70%	1.55%	4.70%	5.92%	9.89%	1.10%	6.10%	2.31%	9.39%	2.50%	7.75%	5.91%	17.23%	23.78%
99 Corridor	2.82%	401,231	58,749	15,201	1,484	23,835	15,675	11,272	37,100	13,330	3,159	11,719	15,453	18,145	3,621	20,767	2,835	38,715	4,794	22,435	22,192	60,750	161,981
Industry %			14.64%	3.79%	0.37%	5.94%	3.91%	2.81%	9.25%	3.32%	0.79%	2.92%	3.85%	4.52%	0.90%	5.18%	0.71%	9.65%	1.19%	5.59%	5.53%	15.14%	40.37%
Other S. CA	2.97%	421,908	26,262	2,654	339	22,160	20,366	9,431	41,267	3,957	7,321	14,301	25,366	32,822	2,811	25,356	6,453	41,204	11,117	39,119	26,012	58,784	124,288
Industry %			6.22%	0.63%	0.08%	5.25%	4.83%	2.24%	9.78%	0.94%	1.74%	3.39%	6.01%	7.78%	0.67%	6.01%	1.53%	9.77%	2.63%	9.27%	6.17%	13.93%	29.46%
L.V.	8.33%	1,184,039	1,193	3,910	3,203	55,483	26,651	25,608	127,475	42,303	14,410	66,633	79,567	60,568	18,011	84,378	10,541	91,920	36,971	260,225	56,300	118,420	418,576
Industry %			0.10%	0.33%	0.27%	4.69%	2.25%	2.16%	10.77%	3.57%	1.22%	5.63%	6.72%	5.12%	1.52%	7.13%	0.89%	7.76%	3.12%	21.98%	4.75%	10.00%	35.35%
US (Metro)		158,497,018	571,241	1,021,408	460,989	7,910,615	10,260,926	5,719,548	15,809,294	5,193,778	3,030,326	9,036,709	7,206,544	11,688,157	2,141,158	10,351,115	3,894,186	18,214,829	3,720,984	11,484,584	9,223,062	20,277,118	42,623,089
Industry %			0.36%	0.64%	0.29%	4.99%	6.47%	3.61%	9.97%	3.28%	1.91%	5.70%	4.55%	7.37%	1.35%	6.53%	2.46%	11.49%	2.35%	7.25%	5.82%	12.79%	26.89%

Table 2: Average Personal Earnings by NAICS Industry (dollars) and Major Trade Area (Sub-areas)

Source: Bureau of Economic Analysis, 2013

Area	Sub-Area	Total Employed	2-Digit NAICS Industry Code																			Total Freight Dependent	
			11	21	22	23	31	42	44	48	51	52	53	54	55	56	61	62	71	72	81		92
San Francisco Major Trade Area: Northern California & Nevada																							
San Jose-San Francisco-Oakland, CA (CSA) minus Stockton	S.F	395,939,257	1,589,999	958,458	2,615,713	17,733,136	48,687,395	15,634,524	19,123,411	7,893,642	36,646,902	24,420,438	11,182,874	67,289,279	12,311,863	14,805,125	6,918,967	33,290,838	4,185,223	10,986,428	11,538,483	48,126,559	106,099,295
Stockton-Lodi, CA (MSA)	N. 99	14,616,337	1,216,623	13,071	183,961	789,577	1,216,127	871,771	1,069,015	1,081,774	153,147	443,074	427,752	438,516	170,422	493,099	226,871	1,791,864	75,648	355,682	594,005	3,004,338	5,728,586
Sacramento-Roseville, CA (CSA)	N. 99	79,535,481	1,025,531	86,311	444,555	4,440,778	3,553,831	2,402,846	470,2639	1,795,842	2,153,699	4,315,950	2,131,538	6,664,786	1,146,280	3,004,916	745,540	8,951,975	696,119	2,002,300	2,993,953	26,239,733	15,751,994
Fresno-Madera, CA (CSA)	N. 99	26,188,511	2,534,995	(D)	355,792	1,196,874	1,707,352	1,140,373	1,656,000	896,755	442,328	873,126	705,973	1,013,847	210,848	873,915	182,839	3,484,359	111,494	627,500	1,053,166	5,770,370	8,459,641
Salinas, CA (MSA)	Other N. CA	12,827,898	2,602,196	41,165	123,989	443,463	368,005	713,031	733,980	271,853	157,804	299,554	309,056	583,334	91,453	279,546	116,326	988,114	212,076	661,319	452,157	3,379,477	5,225,021
Reno-Carson City-Fernley, NV (CSA)	N. NV	16,103,756	73,077	189,246	103,582	951,808	1,278,995	796,678	1,130,728	762,753	179,524	797,918	259,266	1,195,626	482,701	622,841	112,569	1,757,972	267,758	1,177,757	628,351	3,306,884	5,333,896
Modesto, CA (MSA)	N. 99	11,424,317	1,247,997	3,436	(D)	548,644	1,505,091	(D)	881,097	510,663	726,83	277,473	290,675	380,616	134,557	332,822	76,643	1,826,507	46,550	298,407	420,677	2,069,282	4,114,238
Visalia-Porterville-Hanford, CA (CSA)	N. 99	12,907,499	2,977,072	5,561	96,870	432,567	1,053,166	389,974	830,810	493,096	103,315	264,722	136,957	288,448	67,692	330,170	68,095	927,325	32,403	254,737	457,559	3,696,960	5,703,043
Merced, CA (MSA)	N. 99	4,953,878	856,141	(D)	46,015	183,679	534,960	141,774	306,382	196,307	25,317	74,924	64,614	99,972	71,308	97,540	7,279	453,867	18,004	95,403	183,722	1,265,682	2,054,279
Chico, CA (MSA)	N. 99	4,616,164	267,017	4,239	85,682	258,334	233,955	127,436	410,043	71,590	75,246	145,817	91,298	246,796	28,402	147,413	30,271	908,012	23,941	146,359	279,570	1,034,743	1,194,612
Yuba City, CA (MSA)	N. 99	3,515,010	381,862	20,227	(D)	147,565	145,457	(D)	237,341	128,056	29,446	62,206	59,997	104,058	15,214	88,949	14,226	418,958	16,669	82,652	145,176	1,257,959	905,819
Redding, CA (MSA)	Other N. CA	3,766,380	10,711	(D)	61,820	248,590	137,683	108,879	378,630	106,527	45,105	137,574	67,805	196,212	42,553	123,601	32,460	729,559	29,252	124,963	206,199	922,841	799,173
Total	6.40%	586,394,488	14,783,221	1,321,714	4,117,979	27,375,015	60,422,017	22,327,286	31,460,076	14,208,858	40,084,516	32,112,776	15,727,805	78,501,490	14,773,293	21,199,937	8,532,086	55,529,350	5,715,137	16,813,507	18,953,018	100,074,828	161,369,597
Industry Percentage		6.40%	2.52%	0.23%	0.70%	4.67%	10.30%	3.81%	5.37%	2.42%	6.84%	5.48%	2.68%	13.39%	2.52%	3.62%	1.46%	9.47%	0.97%	2.87%	3.23%	17.07%	27.52%
S.F	67.5%	395939257	1589999	958458	2615713	17733136	48687395	15634524	19123411	7893642	36646902	24420438	11182874	67289279	12311863	14805125	6918967	33290838	4185223	10986428	11538483	48126559	106099295
Industry Percentage		67.52%	0.40%	0.24%	0.66%	4.48%	12.30%	3.95%	4.83%	1.99%	9.26%	6.17%	2.82%	16.99%	3.11%	3.74%	1.75%	8.41%	1.06%	2.77%	2.91%	12.16%	26.80%
99 Corridor	26.9%	157,757,197	10,507,238	132,845	1,212,875	7,998,018	9,949,939	5,074,174	10,093,327	5,174,083	3,055,181	6,457,292	3,908,804	9,237,039	1,844,723	5,368,824	1,351,764	18,762,867	1,020,828	3,863,040	6,127,828	44,339,067	43,912,212
Industry Percentage		26.90%	6.66%	0.08%	0.77%	5.07%	6.31%	3.22%	6.40%	3.28%	1.94%	4.09%	2.48%	5.86%	1.17%	3.40%	0.86%	11.89%	0.65%	2.45%	3.88%	28.11%	27.84%
Other Areas	2.83%	16,594,278	2,612,907	41,165	185,809	692,053	505,688	821,910	1,112,610	378,380	202,909	437,128	376,861	779,546	134,006	403,147	148,786	1,717,673	241,328	786,282	658,356	4,302,318	6,024,194
Industry Percentage		2.83%	15.75%	0.25%	1.12%	4.17%	3.05%	4.95%	6.70%	2.28%	1.22%	2.63%	2.27%	4.70%	0.81%	2.43%	0.90%	10.35%	1.45%	4.74%	3.97%	25.93%	36.30%
North NV	2.75%	16,103,756	73,077	189,246	103,582	951,808	1,278,995	796,678	1,130,728	762,753	179,524	797,918	259,266	1,195,626	482,701	622,841	112,569	1,757,972	267,758	1,177,757	628,351	3,306,884	5,333,896
Industry Percentage		2.75%	0.45%	1.18%	0.64%	5.91%	7.94%	4.95%	7.02%	4.74%	1.11%	4.95%	1.61%	7.42%	3.00%	3.87%	0.70%	10.92%	1.66%	7.31%	3.90%	20.53%	33.12%
United States (Metropolitan Portion)		9,164,370,536	70,595,483	124,453,101	65,734,260	499,003,664	836,551,694	478,229,011	538,149,427	303,667,784	325,017,827	695,830,588	201,111,760	965,297,263	259,743,619	381,059,497	159,794,210	1,010,684,540	105,200,543	285,833,483	333,180,845	1,525,231,937	2,664,068,480
Industry Percentage			0.77%	1.36%	0.72%	5.45%	9.13%	5.22%	5.87%	3.31%	3.55%	7.59%	2.19%	10.53%	2.83%	4.16%	1.74%	11.03%	1.15%	3.12%	3.64%	16.64%	29.07%
Los Angeles Major Trade Area: Southern California & Nevada, Eastern Arizona																							
Los Angeles-Long Beach-Anaheim, CA (MSA)	L.A.	482,457,229	288,194	2,484,754	2,550,786	19,458,738	44,564,903	28,843,640	27,379,116	14,802,819	33,440,589	32,893,302	18,337,379	56,283,062	10,061,111	22,053,103	8862,743	46,531,400	13,149,429	15,228,417	17,977,552	67,266,192	128,222,251
San Diego-Carlsbad, CA (MSA)	S.D	118,646,587	443,231	94,186	1,214,381	5,702,086	9,610,482	4,592,427	6,338,096	1,448,377	2,925,899	5,805,046	4,714,386	17,867,139	2,860,191	4,523,975	1,918,862	10,018,100	1,491,741	4,254,155	3,991,987	28,831,840	27,359,325
Riverside-San Bernardino-Ontario, CA (MSA)	L.A.	82,214,667	546,838	214,352	718,794	5,883,270	5,981,063	4,254,909	7,093,321	5,088,554	909,677	2,370,056	2,217,202	3,540,479	793,587	3,914,094	815,484	9,650,837	708,017	2,894,639	3,991,400	20,628,094	25,582,419
Las Vegas-Henderson-Paradise, NV (MSA)	S. NV	54,772,437	17,898	59,118	391,814	3,516,413	1,499,942	1,798,512	4,069,229	2,291,093	804,321	2,269,992	1,162,393	4,054,680	2,203,643	2,512,653	356,292	4,782,143	1,366,632	10,784,626	1,888,042	8,943,001	20,359,416
Oxnard-Thousand Oaks-Ventura, CA (MSA)	L.A.	24,719,536	1,240,942	476,176	168,789	1,095,697	3,833,495	1,336,193	1,680,706	340,685	520,030	1,573,307	732,043	1,846,857	265,651	1,066,076	249,094	2,216,031	209,894	722,595	914,595	4,230,680	9,214,572

Table 2: Average Personal Earnings by NAICS Industry (dollars) and Major Trade Area (Sub-areas)

Source: Bureau of Economic Analysis, 2013

Bakersfield, CA (MSA)	S. 99	23,489,576	3,743,480	2,067,741	211,518	1,479,180	1,079,184	918,430	1,311,578	913,444	184,731	511,542	411,166	1,075,436	333,607	676,797	71,400	1,796,340	88,649	452,300	1,034,345	5,128,708	10,865,277
Santa Maria-Santa Barbara, CA (MSA)	Other S. CA	14,340,692	819,389	267,175	35,766	676,889	1,108,310	465,437	884,745	210,542	516,779	504,050	452,718	1,440,006	236,385	599,987	174,052	1,479,551	144,419	645,091	555,324	3,124,077	4,228,599
San Luis Obispo-Paso Robles-Arroyo Grande, CA (MSA)	Other S. CA	7,460,755	254,128	16,957	(D)	624,336	462,032	204,605	612,988	(D)	116,488	229,510	275,114	479,209	51,779	282,399	32,307	816,749	51,861	391,768	339,523	1,697,872	1,953,826
El Centro, CA (MSA)	S.D	3,865,953	561,519	(D)	55,190	116,675	129,838	151,420	268,048	126,612	21,199	68,720	32,741	70,563	11,989	81,982	10,217	209,863	5,003	78,812	112,148	1,500,486	1,220,066
Lake Havasu City-Kingman, AZ (MSA)	S. NV	2,442,478	10,329	38,146	42,760	122,232	148,507	40,663	310,164	87,010	39,459	78,096	58,421	73,068	(D)	112,359	20,205	506,985	20,680	113,385	134,346	478,263	603,032
Total	8.89%	814,409,910	7,925,948	5,718,605	5,389,798	38,675,516	68,417,756	42,606,236	49,947,991	25,309,136	39,479,172	46,303,621	28,393,563	86,730,499	16,817,943	35,823,425	12,510,656	78,007,999	17,236,325	35,565,788	30,939,262	141,829,213	229,608,783
Industry Percentage		8.89%	0.97%	0.70%	0.66%	4.75%	8.40%	5.23%	6.13%	3.11%	4.85%	5.69%	3.49%	10.65%	2.07%	4.40%	1.54%	9.58%	2.12%	4.37%	3.80%	17.41%	28.19%
LA metro	72.4%	589,391,432	2,075,974	3,175,282	3,438,369	26,437,705	54,379,461	34,434,742	36,153,143	20,232,058	34,870,296	36,836,665	21,286,624	61,670,398	11,120,349	27,033,273	9,927,321	58,398,268	14,067,340	18,845,651	22,883,547	92,124,966	163,019,242
Industry Percentage		72.37%	0.35%	0.54%	0.58%	4.49%	9.23%	5.84%	6.13%	3.43%	5.92%	6.25%	3.61%	10.46%	1.89%	4.59%	1.68%	9.91%	2.39%	3.20%	3.88%	15.63%	27.66%
San Diego	15%	122,512,540	1,004,750	94,186	1,269,571	5,818,761	9,740,320	4,743,847	6,606,144	1,574,989	2,947,098	5,873,766	4,747,127	17,937,702	2,872,180	4,605,957	1,929,079	10,227,963	1,496,744	4,332,967	4,104,135	30,332,326	28,579,391
Industry Percentage		15.04%	0.82%	0.08%	1.04%	4.75%	7.95%	3.87%	5.39%	1.29%	2.41%	4.79%	3.87%	14.64%	2.34%	3.76%	1.57%	8.35%	1.22%	3.54%	3.35%	24.76%	23.33%
99 Corridor	2.88%	23,489,576	3,743,480	2,067,741	211,518	1,479,180	1,079,184	918,430	1,311,578	913,444	184,731	511,542	411,166	1,075,436	333,607	676,797	71,400	1,796,340	88,649	452,300	1,034,345	5,128,708	10,865,277
Industry Percentage		2.88%	15.94%	8.80%	0.90%	6.30%	4.59%	3.91%	5.58%	3.89%	0.79%	2.18%	1.75%	4.58%	1.42%	2.88%	0.30%	7.65%	0.38%	1.93%	4.40%	21.83%	46.26%
Other S. CA	2.68%	21,801,447	1,073,517	284,132	35,766	1,301,225	1,570,342	670,042	1,497,733	210,542	633,267	733,560	727,832	1,919,215	288,164	882,386	206,359	2,296,300	196,280	1,036,859	894,847	4,821,949	6,182,425
Industry %		2.68%	4.92%	1.30%	0.16%	5.97%	7.20%	3.07%	6.87%	0.97%	2.90%	3.36%	3.34%	8.80%	1.32%	4.05%	0.95%	10.53%	0.90%	4.76%	4.10%	22.12%	28.36%
L.V.	7.03%	57,214,915	28,227	97,264	434,574	3,638,645	1,648,449	1,839,175	4,379,393	2,378,103	843,780	2,348,088	1,220,814	4,127,748	2,203,643	2,625,012	376,497	5,289,128	1,387,312	10,898,011	2,022,388	942,1264	20,962,448
Industry %		7.03%	0.05%	0.17%	0.76%	6.36%	2.88%	3.21%	7.65%	4.16%	1.47%	4.10%	2.13%	7.21%	3.85%	4.59%	0.66%	9.24%	2.42%	19.05%	3.53%	16.47%	36.64%
US (Metro. Portion)		9,164,370,536	70,595,483	124,453,101	65,734,260	499,003,664	836,551,694	478,229,011	538,149,427	303,667,784	325,017,827	695,830,588	201,111,760	965,297,263	259,743,619	381,059,497	159,794,210	1,010,684,540	105,200,543	285,833,483	333,180,845	1,525,231,937	2,664,068,480
Industry %			0.77%	1.36%	0.72%	5.45%	9.13%	5.22%	5.87%	3.31%	3.55%	7.59%	2.19%	10.53%	2.83%	4.16%	1.74%	11.03%	1.15%	3.12%	3.64%	16.64%	29.07%