



Northern Rural Training and
Employment Consortium (NoRTEC)

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Nevada County Labor Market Profile and Industry Sector Analysis

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July 2019

Prepared for:

NoRTEC Workforce Development Board

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INTRODUCTION

The following is a labor market and industry/sector profile for Nevada County, California. This is an update to a prior version of the County Labor Market Profiles that were completed in the summer of 2017, which were completed using 2016 labor market data.



The quantitative data for the profile includes a geographic overview, demographic and labor force characteristics, industry analysis, occupation analysis, and labor force data. For the profile, the project team collected and analyzed data from Economic Modeling Specialists Int'l. (EMSI), U.S. Census Bureau, and the U.S. Bureau of Labor Statistics. Though 2019 is the current calendar year, 2018 labor market data are utilized as these represent the latest full calendar year of data available from federal statistical agencies.

EXECUTIVE SUMMARY

The following are some of the most pertinent information and statistics uncovered in the process of creating this report.

Social and Demographic Highlights

- Population growth in Nevada County significantly trails rates for California and the United States. Over the prior ten years, population increased by only 2% while population increased by 9% for the state and 8% for the nation.
- Nevada County's population has an aging population. Over the last ten years, individuals over 65 years of age increased more than any other age cohort. Those between 20-34 also increased, adding 675 individuals to the County, but are projected to drop by nearly 500 by 2023. Individuals over 65 are projected to increase.
- The educational attainment percentage of individuals in Nevada County is higher than those in the NoRTEC region. The County also has a higher percentage of individuals with a Bachelor's degree than California and the U.S.
- Nevada County experiences a net loss of talent due to out-commuting. Less than 10,000 individuals commute into the county for work versus nearly 16,000 commuting out for work. In total, 15,913 individuals both live and work in Nevada County.
- Nevada County has the highest median household income of any county in the NoRTEC region at \$60,610 and the lowest poverty rate of any county in the NoRTEC region at 12.1%. Also, Nevada County has the lowest percentage of individuals in the NoRTEC region enrolled in CalFresh benefits at 7.2%.
- As of December 2018, there were 49,257 individuals in the Nevada County labor force, of which 1,623 were unemployed.

- Since the 2016 version of this report was released, the Nevada County economy has expanded at an average annual rate of 1.7%. The highest growth sectors include Healthcare & Social Assistance, and Accommodation & Food Services. In combination, these sectors added close to 600 jobs, over 40% of the county's net new job growth. Meanwhile, Education Services; Finance and Insurance; and Professional, Scientific, & Technical Services all decreased in employment over the past two years.
- Between 2016 and 2018, Nevada County's population increased slightly by 1.0% (+973 in numeric terms). The highest growth age groups included those ages 70 to 74 years, and those age 25 to 29 saw the largest decrease. The highest growth race/ethnicity groups included White Hispanics and White, Non-Hispanics.

Industry & Occupation Highlights

- Nevada County's largest industry sectors include Government; Health Care and Social Assistance; Construction; and Retail Trade.
- Significant industries adding the most jobs in Nevada County include Other Services (except Public Administration) (+806 jobs); Health Care and Social Assistance (+627 jobs); Accommodation and Food Services (+622 jobs); and Construction (+499 jobs).
- Occupations that make up the largest employment in Nevada County include Office and Administrative Support Occupations (4,800 jobs); Sales and Related Occupations (4,197 jobs); and Food Preparation and Serving Related Occupations (3,737 jobs).
- The target industries for Nevada County include Health Care, Information Technology, Manufacturing, and Tourism. Nevada County has more employment growth in the Tourism industry than most other counties in the NoRTEC region.

ECONOMIC IMPACT OF 2018 FOREST FIRES

Thomas P. Miller & Associates (TPMA) conducted an economic impact analysis of the northern California forest fires of 2018 for NoRTEC in January 2019. TPMA's analysis started with a literature review and an empirical observation of the economic effects of wildfires in the United States. The literature review provided general and specific trends on the topic. For the empirical review, TPMA focused on other highly destructive fires in the United States in terms of acreage, structures, or both. Since few federal data sources have yet to reveal the specific effects of the Camp and Carr fires on Northern California, these analyses were primarily based on observations of past similar events. In addition, Dr. Robert Eyster of Sonoma State University, a renown regional economist, has summarized some of the recent effects of the Carr and Camp fires on northern California.

In general, economic impacts are most severe upon those counties in which the fires occurred, namely, Shasta and Butte, though some impacts upon adjacent counties is expected. The following are a few pertinent points that relate to likely affects on Nevada County.

- Not being adjacent to Shasta or Butte Counties, Nevada County likely experienced little positive economic impact in retail and accommodations industries during the 2018 forest fires.
- Historically, areas near wildfires suffer a slight lag in land-dependent industry sectors, such as tourism and agriculture, over the next several seasons.
- Forest service suppression spending on contractors located in Nevada equated to \$320 thousand between October 2017 and December 2018.

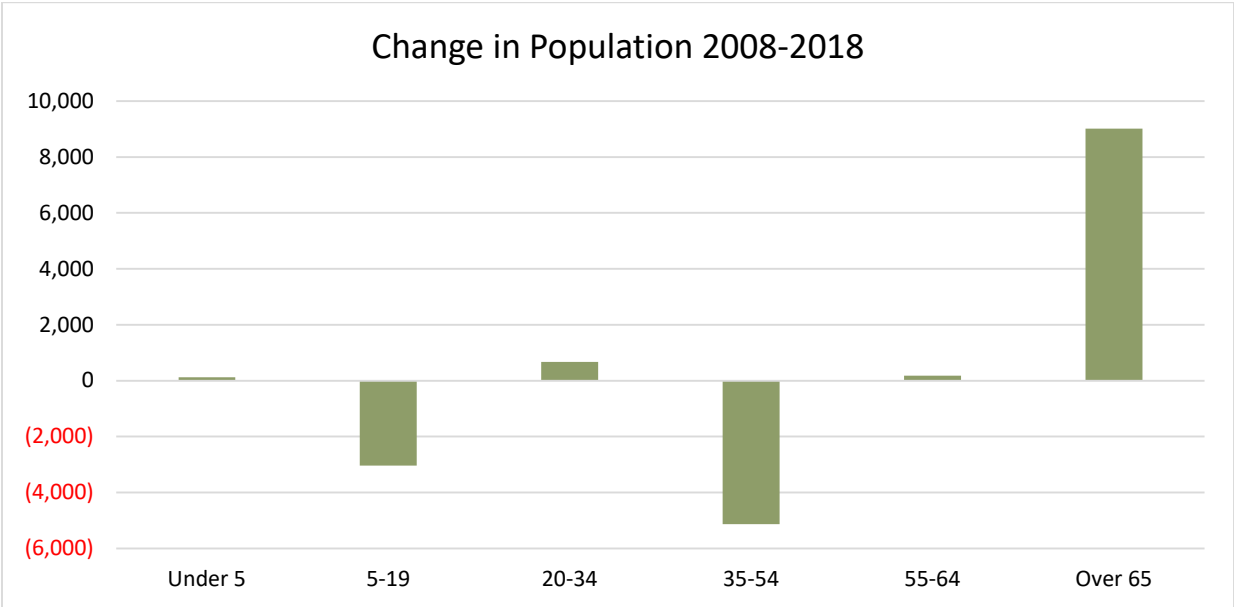
DEMOGRAPHIC & LABOR FORCE CHARACTERISTICS

Total Population

Nevada County is geographically located in the southern most area of the NoRTEC region. The population in the county has increased since 2008, adding over 1,800 individuals. The majority of that population growth was concentrated amongst those over 65 years of age whereas the majority of the population that experienced significant declines are those ages 5-19 and 35-54. Projections over the next five years indicate population decline of those ages 20-34 (488) and 55-64 (2,481), which is concerning as these individuals are typically active members of the labor force. As these populations decline and older population increase, Nevada County will struggle to fill jobs from older individuals exiting the workforce.

Compared to the state and national figures, Nevada County’s population growth has occurred at a slower rate than that of the state and nation. Over the last ten years, California’s population increased by 9% and the nation’s population increased by 8%. By 2023, both the state and the nation’s population are projected to grow by 3%, 1% more than that of Nevada County.

Age	2008 Population	2018 Population	Change 2008-2018	% Change 2008-2018	Projected Change 2018-2023	
Under 5	4,345	4,461	116	3%	163	4%
5-19	17,625	14,583	(3,042)	(17%)	496	3%
20-34	13,347	14,022	675	5%	(488)	(3%)
35-54	27,707	22,575	(5,132)	(19%)	172	1%
55-64	16,909	17,090	181	1%	(2,481)	(15%)
Over 65	18,275	27,297	9,022	49%	3,655	13%
Total	98,205	100,028	1,823	2%	1,515	2%



Race/Ethnicity

The population of the region is predominately White, with over 85% identifying as White in 2018, followed by 8% identifying as Hispanic, 2% identifying as Two or More Races, and 1% identifying as Asian.¹ The top fastest growing race/ethnicity groups in the county are Native Hawaiian or Pacific Islander and Black. Only one race/ethnicity group has declined in population over the last ten years: White.

Race/Ethnicity	2018 Population	Change 2008-2018	% Change 2008-2018
White	85,870	(838)	(1%)
Hispanic	7,914	1,706	22%
Two or More Races	2,188	466	21%
Asian	1,065	209	20%
American Indian or Alaskan Native	739	62	8%
Black	335	145	43%
Native Hawaiian or Pacific Islander	93	76	82%

Educational Attainment

The educational attainment percentage of individuals in Nevada County is higher than those in the NoRTEC region. Though the NoRTEC region has a higher percentage of individuals with some college or less, Nevada County has a higher percentage of individuals with an Associate's degree or higher. The County also has a higher percentage of individuals with a Bachelor's degree than California and the U.S. though California and the U.S. outperform NoRTEC and Nevada County with individuals with a graduate degree or higher, Nevada County trails just slightly.

Education Level	2018 Nevada County Population	2018 Nevada County Percent	2018 Percent NoRTEC	2018 Percent California	2018 Percent US
Less Than 9th Grade	2,028	2.6%	4.9%	11.8%	6.8%
9th Grade to 12th Grade	3,358	4.4%	6.9%	7.0%	6.9%
High School Diploma	15,950	20.8%	25.3%	20.8%	27.6%
Some College	21,683	28.3%	30.5%	21.4%	20.7%
Associate's Degree	8,074	10.5%	9.8%	7.6%	8.0%
Bachelor's Degree	17,182	22.4%	15.0%	19.9%	18.6%
Graduate Degree and Higher	8,429	11.0%	7.6%	11.6%	11.3%

¹ The Hispanic population includes Hispanics in White, Black, Two or More Races, Asian, American Indian or Alaskan Native, Native Hawaiian, or Pacific Islander.

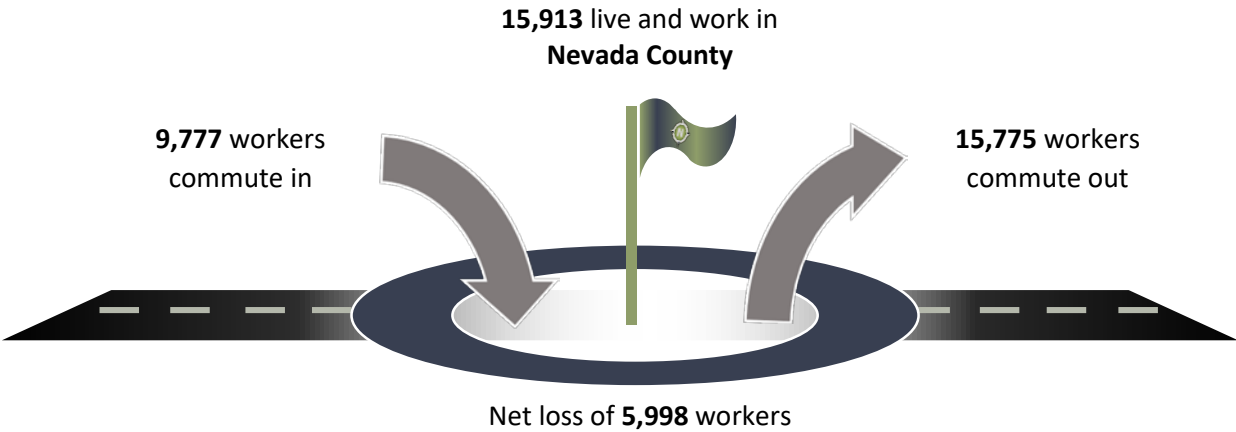
Income

Nevada County has the highest median household income of any county in the NoRTEC region at \$60,610 which is \$6,559 less than California and \$2,958 more than the U.S. Nevada County’s low poverty rate is also the lowest of any county in the NoRTEC region at 12.1%. Compared to Del Norte County, Nevada County’s poverty rate is nearly half.

County	Median Household Income 2013-2017	Poverty Rate
Butte	\$46,516	20.5%
Del Norte	\$41,287	23.2%
Lassen	\$54,083	14.6%
Modoc	\$39,296	18.1%
Nevada	\$60,610	12.1%
Plumas	\$50,266	13.3%
Shasta	\$47,258	18.1%
Sierra	\$44,190	12.3%
Siskiyou	\$40,884	20.7%
Tehama	\$42,512	20.9%
Trinity	\$36,563	19.9%
California	\$67,169	15.1%
United States	\$57,652	14.6%

Commuting

The graphic below details the commuting patterns into and out of Nevada County in 2015. With 15,775 workers commuting out of the county and 9,777 commuting into the county, a net loss of 5,998 workers is experienced in Nevada County. Over 15,900 individuals work and live in the county. Of those commuting into Nevada County, 54.5% are workers between the ages of 30 and 54, and 43.5% earn more than \$3,333 per month.



In addition to looking at commuting data by total population, it is also helpful to examine commuter statistics by occupational classification. In terms of occupational classification, only Education, Training, and Library Occupations contributed to in-commuters. Occupation groups with the largest number of out-commuters include Office and Administrative Support Occupations; Food Preparation and Serving Related Occupations; Sales and Related Occupations; and Personal Care and Service Occupations.

Occupation Group	2018 Commuters
Education, Training, and Library Occupations	29 in-commuters
Life, Physical, and Social Science Occupations	36 out-commuters
Protective Service Occupations	55 out-commuters
Community and Social Service Occupations	63 out-commuters
Legal Occupations	70 out-commuters
Arts, Design, Entertainment, Sports, and Media Occupations	80 out-commuters
Military-only occupations	124 out-commuters
Construction and Extraction Occupations	131 out-commuters
Healthcare Support Occupations	132 out-commuters
Building and Grounds Cleaning and Maintenance Occupations	151 out-commuters
Architecture and Engineering Occupations	152 out-commuters
Farming, Fishing, and Forestry Occupations	176 out-commuters
Production Occupations	236 out-commuters
Installation, Maintenance, and Repair Occupations	265 out-commuters
Computer and Mathematical Occupations	299 out-commuters
Healthcare Practitioners and Technical Occupations	341 out-commuters
Management Occupations	372 out-commuters
Transportation and Material Moving Occupations	408 out-commuters
Business and Financial Operations Occupations	525 out-commuters
Personal Care and Service Occupations	552 out-commuters
Sales and Related Occupations	579 out-commuters
Food Preparation and Serving Related Occupations	790 out-commuters
Office and Administrative Support Occupations	905 out-commuters

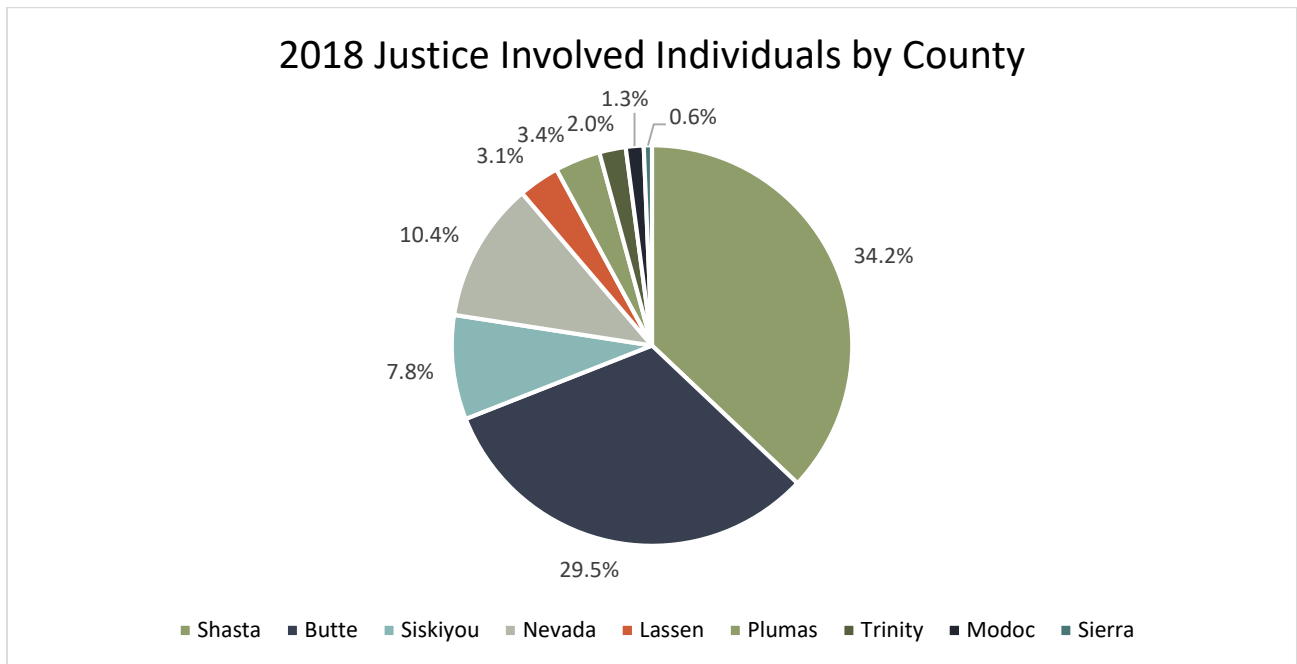
Special Populations

With consideration of the state of California’s Regional and Local Planning Guidance for program year 2018-19, California counties are also concerned with quantifying and assisting certain sub-population groups, namely: formerly incarcerated and other justice-involved individuals and CalFresh recipients.

Justice-Involved Individuals

The graph and table below detail the percentage of individuals involved in felony probations, misdemeanor probations, mandatory supervisions, and post-release community supervisions (PRCS) within the 11- county NoRTEC region.²

The largest share of activity stems from Shasta County (34.2%) followed by Butte County (29.5%) and Siskiyou County (7.8%). Nevada County makes up 10.4% of justice involved activity in the region. Nearly three-quarters of those involved stem from felony probation. In the NoRTEC region in 2017, there were a total of 7,372 individuals involved in felony probations, misdemeanor probations, or mandatory supervision.



² Data for this section of the report are derived from the Chief Probation Officers of California, <https://www.cpoc.org/data>.

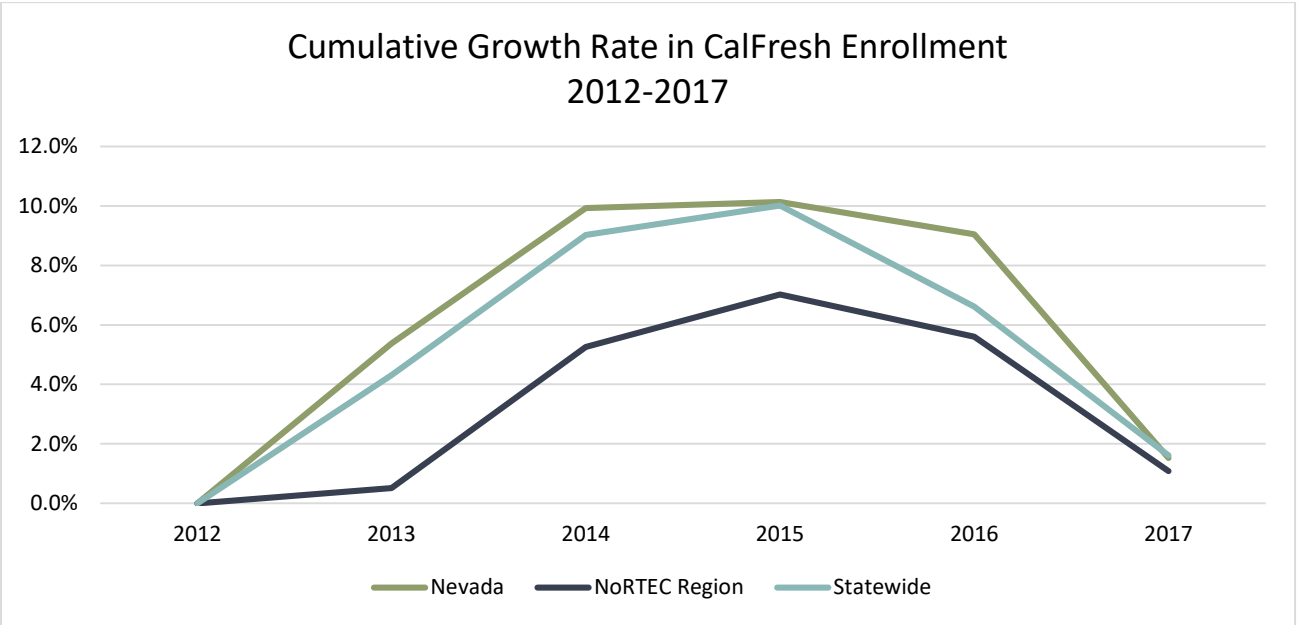
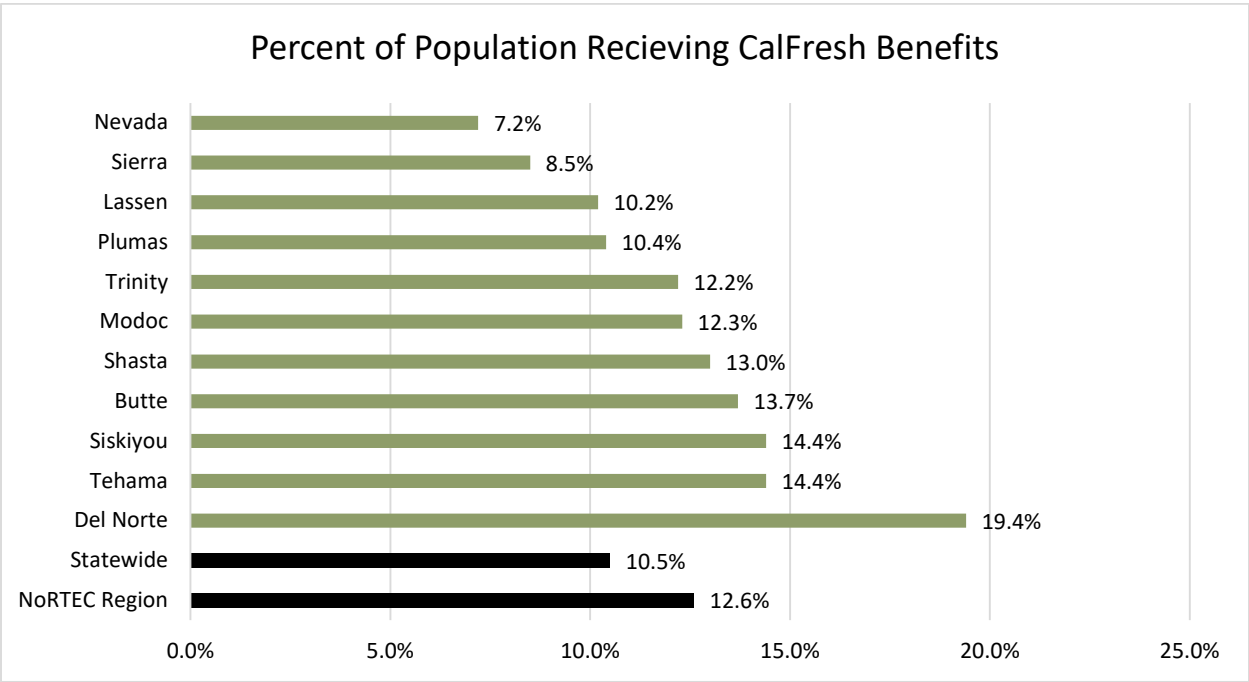
	Felony Probation	Misdemeanor Probation	Mandatory Supervision	PRCS	Total
Shasta	1,976	0	156	389	2,521
Butte	1,339	272	165	401	2,177
Siskiyou	507	7	12	47	573
Tehama	N/A	N/A	N/A	N/A	N/A
Nevada	566	127	30	47	770
Lassen	126	75	8	17	226
Plumas	148	86	1	15	250
Trinity	111	17	4	13	145
Modoc	79	19	N/A	N/A	98
Del Norte	N/A	N/A	N/A	N/A	N/A
Sierra	28	15	1	1	45

CalFresh Recipients

CalFresh, the California implementation of Supplemental Nutrition Assistance Program (SNAP), is received by larger percentage of NoRTEC area residents than statewide residents.³ In Nevada County, only 7.2% of individuals receive CalFresh, the smallest share of any county in the NoRTEC region. For comparison, the NoRTEC region is 6.8% less and the state is 8.5% less.

Between 2012 and 2015, the NoRTEC region experienced a rise in the number of individuals enrolled in CalFresh and then a considerable decrease between 2015 and 2017. The trendline for enrollment is mirrored in Nevada County. Enrollment of CalFresh in Nevada County was at its peak in in 2015 with 7,737 individuals enrolled and at its lowest in 2012 with 7,025 individuals enrolled.

³ Data for this section are derived from the California Department of Social Services, CalFresh Data Dashboard, <https://www.cdss.ca.gov/inforesources/Data-Portal/Research-and-Data/CalFresh-Data-Dashboard>.



HUMAN CAPITAL

Labor Force

Labor Force Participation Rate
 The labor force participation rate represents the proportion of the population that is working or pursuing work, as opposed to those voluntarily not working or not pursuing work. The labor force participation rate is affected by various factors, including availability of jobs, socioeconomic composition of the population, demographics, as well as structural changes in the economy.

EMPLOYMENT IN NEVADA COUNTY 1998-2018 ⁴		
Peak	July 2007 (48,800)	December 2018 (47,634 – 2% lower)
Trough	February 1998 (38,735)	December 2018 (47,634 – 23% higher)
December 2018	Employment: 47,634 Labor Force: 49,257 Unemployment rate: 3.3%	

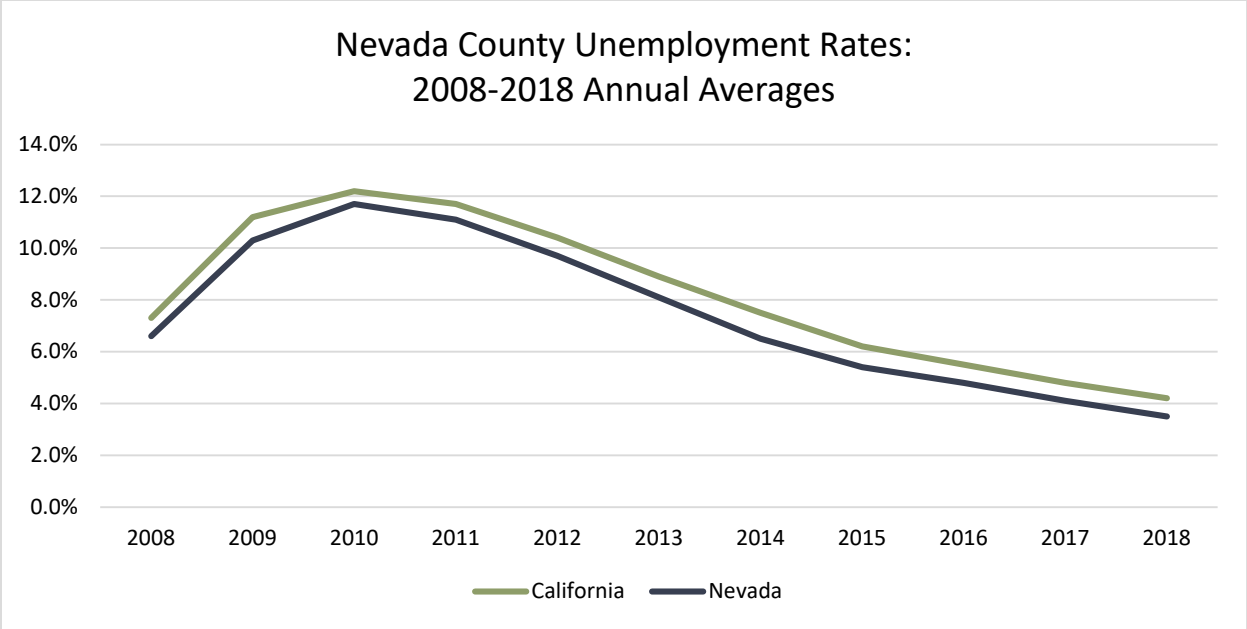
Labor force statistics include both the employed and the unemployed, excluding only those who have stopped looking for work (discouraged workers) and those who are voluntarily not in the labor force. In December 2018, 49,257 individuals participated in the Nevada County labor force, of these, 47,634 were employed and 1,623 were unemployed⁵. Over the last 20 years, employment in the county was at its highest in July 2007 and lowest in February 1998. As of December 2018, the unemployment rate was 3.3%, lower than the unemployment rate of California (4.1%) and the United States (3.9%). In comparison to other counties in the NoRTEC region, this amongst the lowest unemployment rates.

Labor Force Participation Rate

The labor force participation rate is sensitive to demographic changes because participation rates vary across age, gender, income and race/ethnicity.⁶ The national labor force participation rate has decreased since 2000, a trend that is expected to continue in the next decade in part due to the aging of the baby-boomer generation. In 2000, baby boomers were the heart of the workforce. However, as this large group of individuals moves closer to retirement, the overall workforce participation rate decreases. It is worth mentioning that the participation rate of older workers has been increasing in the past ten years, but it is still significantly lower than those of the young adult and middle-aged groups.

In Nevada County, workers in older age brackets (55-64 years) make up approximately 17% of the population. However, workers in age brackets ideal for the labor force make up 23% of the county’s population. While the county has an aging population, the impact it will have on the local workforce is not as pressing as neighboring counties in the NoRTEC region.

⁴ U.S. Bureau of Labor Statistics, 1998.4-2018.4. <http://www.bls.gov/data/>
⁵ December of 2018 was used as comparison throughout the 1998-2008 timeframe.
⁶ For example, in 2015 the national labor force participation rate for individuals older than age 54 (40.0%) was significantly lower than for those between the ages of 25 and 54 (81.3%).



Generally, unemployment tends to spike during recessions and following major layoffs, eventually settling to a more normal and stable rate as individuals adjust to the new availability of employment opportunities. Prolonged periods of unusually high unemployment are typically a signal that the supply of workers is not in balance with demand for workers.

Since 2010, Nevada County’s unemployment rate has continued to decline to 3.5% in 2018. Over the ten-year period, the unemployment rate for the county has been lower than that of California. At its peak, unemployment for Nevada County was 12.2% in 2010. The unemployment rate trend mirrors that of the state much closer than any other county in the NoRTEC region.

INDUSTRY SECTOR ANALYSIS

To this point, the analysis of Nevada County has focused on the socioeconomic characteristics of the region's population. Socioeconomic data are useful in understanding the economy, but to truly comprehend economic dynamics we must also analyze industry data. Industry data are classified according to the types of goods and services that are rendered by businesses. These data indicate past and projected growth trends by sector and reveal sectors in which Nevada County is well suited to be competitive.

A chart and several tables are displayed related to industry data. Each of the figures provide data that descend in order according to 2018 employment. Other data displayed include: employment growth over the past five years, forecasted growth over the next five years, growth due to competitive effect (CE), and location quotient (LQ).

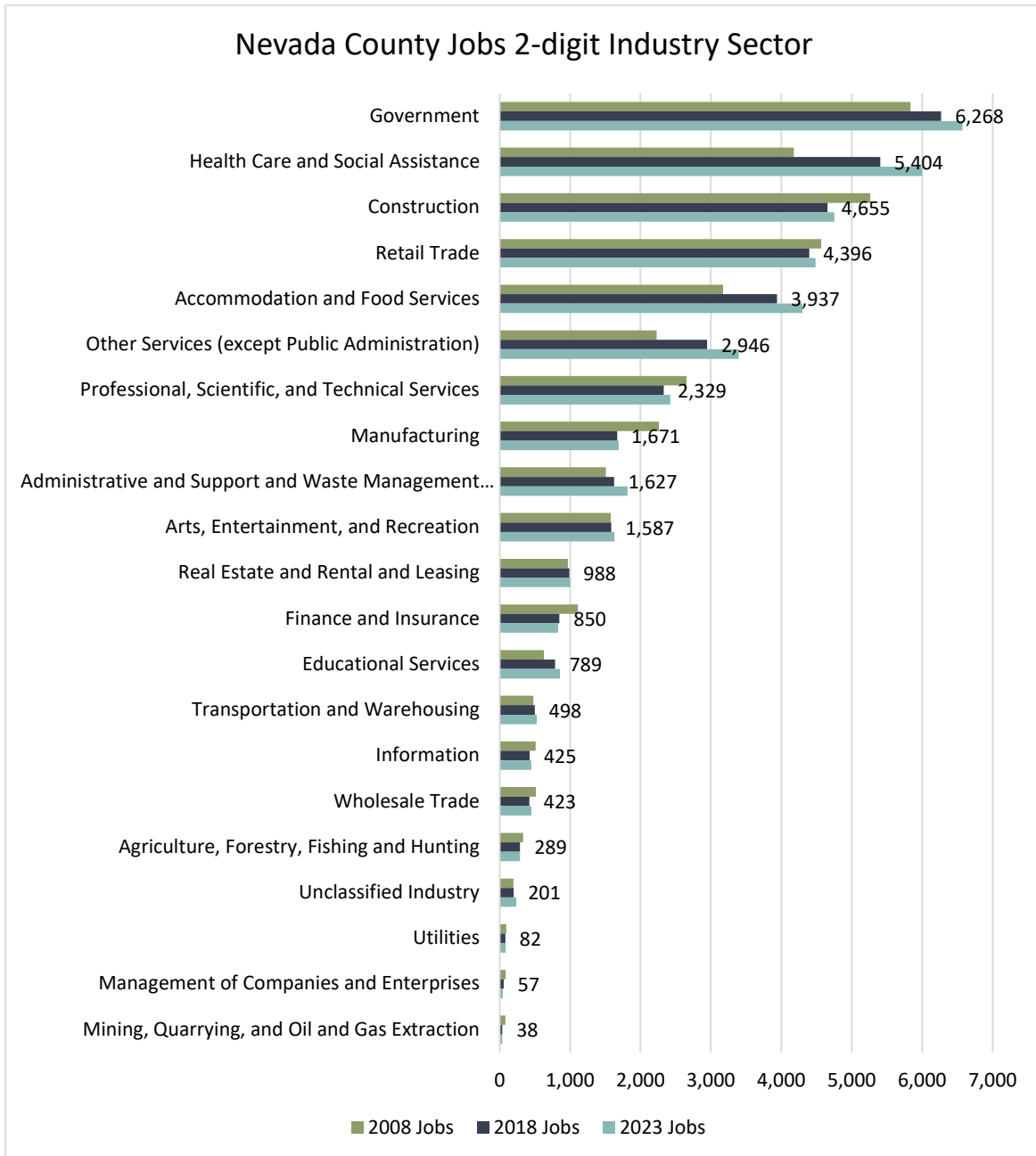
The *competitive effect* helps to determine the amount of job growth that occurred due to the county's competitive advantages as compared to the national growth in general and the national growth rate for each sector. In other words, a positive number indicates that the county experienced more growth than was expected.

Location Quotient (LQ) measures how concentrated or specialized an industry is in a particular county and helps to demonstrate what makes a particular county's economy unique. A number greater than 1.25 indicates that the particular sector is considerably more concentrated than the national average. It also typically indicates that local demand for the products and/or services produced by that industry have been met and the industry is likely exporting products and/or services outside of the county. In other words, these may be industries that are bringing money into the county, rather than circulating money already present within the county.⁷

⁷ Data from this section are from Economic Modeling Specialists International (EMSI), 2019.2 Class of Worker.

Industry Mix

The broad industry sectors in Nevada County employing the most workers are Government (6,268; 16%); Health Care and Social Assistance (5,404; 14%); Construction (4,655; 12%); and Retail Trade (4,396; 11%). These sectors and the next five most-employed sectors have experienced growth in employment over the last five years and are projected to continue growing into the next five years. Of these sectors, Other Services (except Public Administration) experienced the greatest increase in jobs since 2013, adding 806 jobs. Projections into the next five years indicate Health Care and Social Assistance will add the most jobs (598).



Only five sectors experienced a decline in jobs over the last five years: Arts, Entertainment, and Recreation (207 jobs); Real Estate and Rental and Leasing (117 jobs); Wholesale Trade (91 jobs); Mining, Quarrying, and Oil and Gas Extraction (21 jobs); and Management of Companies and Enterprises (4 jobs).

Looking deeper into job change in the county, competitive effect reveals how many jobs were created or retained due uniquely to characteristics of Nevada County. According to these data, Other Services (except Public Administration) is the strongest (adding 668 jobs due to competitive effect). Others that performed better in Nevada County than other regions in the United States include Government (399 jobs); Accommodation and Food Services (190 jobs); Administrative and Support and Waste Management and Remediation Services (177 jobs); and Health Care and Social Assistance (114 jobs).

Industries with the strongest location quotient score in Nevada County include Arts, Entertainment, and Recreation; Construction; Other Services (except Public Administration); and Real Estate and Rental and Leasing.

Industry	2013 Jobs	2018 Jobs	Change 2013 – 2018	% Change 2013-2018	Change 2018-2023	% Change 2018-2023	2018 LQ	Comp. Effect
Government	5,757	6,268	511	9%	305	5%	1.06	399
Health Care and Social Assistance	4,777	5,404	627	13%	598	11%	1.08	114
Construction	4,156	4,655	499	12%	98	2%	2.12	(249)
Retail Trade	4,150	4,396	246	6%	89	2%	1.10	50
Accommodation and Food Services	3,315	3,937	622	19%	360	9%	1.16	190
Other Services (except Public Administration)	2,140	2,946	806	38%	449	15%	1.57	668
Professional, Scientific, and Technical Services	2,263	2,329	66	3%	95	4%	0.91	(215)
Manufacturing	1,668	1,671	3	0%	18	1%	0.54	(80)
Administrative and Support and Waste Management and Remediation Services	1,310	1,627	317	24%	189	12%	0.66	177
Arts, Entertainment, and Recreation	1,794	1,587	(207)	(12%)	42	3%	2.31	(477)
Real Estate and Rental and Leasing	1,105	988	(117)	(11%)	14	1%	1.48	(240)
Finance and Insurance	831	850	19	2%	(18)	(2%)	0.54	(40)
Educational Services	634	789	155	24%	69	9%	0.78	98
Transportation and Warehousing	478	498	20	4%	30	6%	0.35	(79)
Information	421	425	4	1%	25	6%	0.59	(17)
Wholesale Trade	514	423	(91)	(18%)	29	7%	0.29	(101)
Agriculture, Forestry, Fishing and Hunting	271	289	18	7%	(1)	(0%)	0.62	16
Unclassified Industry	114	201	87	76%	36	18%	3.77	50
Utilities	57	82	25	44%	5	6%	0.61	24
Management of Companies and Enterprises	61	57	(4)	(7%)	(10)	(18%)	0.10	(11)
Mining, Quarrying, and Oil and Gas Extraction	62	38	(24)	(39%)	1	3%	0.23	(12)

Key Industries

The following table shows the 20 largest 4-digit North American Industrial Classification System (NAICS) industries in terms of employment in Nevada County in 2018. Sectors that experienced the greatest increase in jobs over the last five years include Restaurants and Other Eating Places (494 jobs); State Government, Excluding Education and Hospitals (404 jobs); Business, Professional, Labor, Political, and Similar Organizations (391 jobs); and Services to Building and Dwellings (312 jobs). Only four of the top sectors are projected to experience a decline in jobs over the next five years, one of which will continue its decline from the previous five years: Other Specialty Trade Contractors.

Industry	2018 Jobs	Change 2013-2018	% Change 2013-2018	Projected Change 2018-2023	Projected % Change 2018-2023
Education and Hospitals (Local Government)	3,047	(5)	(0%)	44	1%
Restaurants and Other Eating Places	2,921	494	20%	267	9%
Local Government, Excluding Education and Hospitals	2,191	124	6%	106	5%
Residential Building Construction	1,530	117	8%	12	1%
Grocery Stores	1,259	64	5%	17	1%
Other Amusement and Recreation Industries	1,241	(279)	(18%)	8	1%
Services to Buildings and Dwellings	1,223	312	34%	181	15%
Individual and Family Services	1,193	254	27%	286	24%
Building Equipment Contractors	829	77	10%	41	5%
General Medical and Surgical Hospitals	816	99	14%	(10)	(1%)
Building Finishing Contractors	709	55	8%	(17)	(2%)
Business, Professional, Labor, Political, and Similar Organizations	687	391	132%	175	25%
Offices of Physicians	622	25	4%	(19)	(3%)
Building Material and Supplies Dealers	580	123	27%	38	7%
Other Specialty Trade Contractors	556	(15)	(3%)	(39)	(7%)
Foundation, Structure, and Building Exterior Contractors	555	97	21%	46	8%
Traveler Accommodation	548	(20)	(4%)	31	6%
Nursing Care Facilities (Skilled Nursing Facilities)	537	26	5%	25	5%
State Government, Excluding Education and Hospitals	527	404	328%	184	35%
Automotive Repair and Maintenance	521	106	26%	72	14%

OCCUPATION ANALYSIS

An examination of occupational demand is separate and distinct from industry analysis because industries require a mix of occupations to function. For example, the Manufacturing sector employs occupations that might be traditionally defined as “manufacturing occupations” – called Production occupations at the broadest level of occupation classification. The Manufacturing sector, however, also employs managers, accountants, maintenance and repair personnel, and many other occupational categories necessary for the industry’s operation. As a workforce development board, NoRTEC’s mission is to serve individual job seekers and businesses more than driving forward industry-specific economic development. As such, it’s important to understand the specific occupational roles that are required to keep local businesses functioning.

The occupational analysis that follows provides a view of the most critical occupations within the region from an overarching economic perspective and specifically related to some of the key industries that were highlighted previously.

Occupational Groups

Nevada County’s top 2-digit Standard Occupational Classification (SOC) System categories include:

- Office and Administrative Support Occupations (4,800 jobs)
- Sales and Related Occupations (4,197 jobs)
- Food Preparation and Serving Related Occupations (3,737 jobs)
- Construction and Extraction Occupations (3,725 jobs)
- Education, Training, and Library Occupations (2,933 jobs)

The median hourly earnings for all occupations range from \$12.41/hr. for Personal Care and Service Occupations to \$39.58/hr. for Healthcare Practitioners and Technical Occupations.

As noted in the industry analysis section, location quotient scores can indicate fields where the county has a strong competitive advantage over other regions in United States. Occupational categories where Nevada County has a strong concentration of workers (above an LQ of 1.25) include:

- Construction and Extraction Occupations (2.06)
- Building and Grounds Cleaning and Maintenance Occupations (1.46)
- Personal Care and Service Occupations (1.44)
- Life, Physical, and Social Science Occupations (1.43)
- Arts, Design, Entertainment, Sports, and Media Occupations (1.42)
- Education, Training, and Library Occupations (1.31)
- Community and Social Service Occupations (1.29)

These are the occupation groups for which the region is highly specialized.

Broad Occupation Mix

Occupation	2018 Employment	% of Total Employment	Median Hourly Earning	2018 Location Quotient
Office and Administrative Support Occupations	4,800	12.2%	\$18.68	0.83
Sales and Related Occupations	4,197	10.6%	\$14.25	1.07
Food Preparation and Serving Related Occupations	3,737	9.5%	\$12.36	1.13
Construction and Extraction Occupations	3,725	9.4%	\$19.75	2.06
Education, Training, and Library Occupations	2,933	7.4%	\$22.09	1.31
Personal Care and Service Occupations	2,448	6.2%	\$12.41	1.44
Management Occupations	2,430	6.2%	\$31.58	1.09
Building and Grounds Cleaning and Maintenance Occupations	2,112	5.4%	\$13.62	1.46
Healthcare Practitioners and Technical Occupations	1,834	4.6%	\$39.58	0.84
Transportation and Material Moving Occupations	1,622	4.1%	\$17.10	0.60
Installation, Maintenance, and Repair Occupations	1,472	3.7%	\$20.93	0.95
Business and Financial Operations Occupations	1,328	3.4%	\$29.87	0.65
Production Occupations	1,209	3.1%	\$18.62	0.52
Arts, Design, Entertainment, Sports, and Media Occupations	1,033	2.6%	\$19.88	1.42
Protective Service Occupations	938	2.4%	\$28.68	1.06
Healthcare Support Occupations	921	2.3%	\$16.81	0.86
Community and Social Service Occupations	838	2.1%	\$20.20	1.29
Computer and Mathematical Occupations	471	1.2%	\$31.10	0.41
Life, Physical, and Social Science Occupations	463	1.2%	\$27.29	1.43
Architecture and Engineering Occupations	392	1.0%	\$32.75	0.59
Farming, Fishing, and Forestry Occupations	266	0.7%	\$17.15	0.91
Legal Occupations	215	0.5%	\$35.82	0.66
Military-only occupations	75	0.2%	\$19.77	0.31

Top Occupations by Employment

The following table displays the top occupational by total employment for the slightly more specific group of 4-digit Standard Occupational Classification (SOC) Codes. Median hourly earnings for these occupations range from \$12.12 for Cashiers to \$37.85 for General and Operations Managers. All of the top occupations have experienced growth over the last five years with the exception of two: Office Clerks, General (-9 jobs) and Bookkeeping, Accounting, and Auditing Clerks (-6 jobs). Projections into the next five years indicate job growth for all occupations, including Office Clerks, General; and Bookkeeping, Accounting, and Auditing Clerks. The greatest projected job growth amongst those occupations is concentrated within Personal Care Aides (207 jobs); Fast Food and Counter Workers (123 jobs); and Grounds Maintenance Workers (111 jobs). Each of these occupations are associated with low median hourly earnings.

Other occupations with high median hourly earnings include Elementary and Middle School Teachers (\$35.24); Driver/Sales Workers and Truck Drivers (\$20.54); and Carpenters (\$20.27), however these occupations are far from the top of those with high projected annual openings. Cashiers, which has the lowest median hourly earnings, is projected to have the most annual openings by 2023.

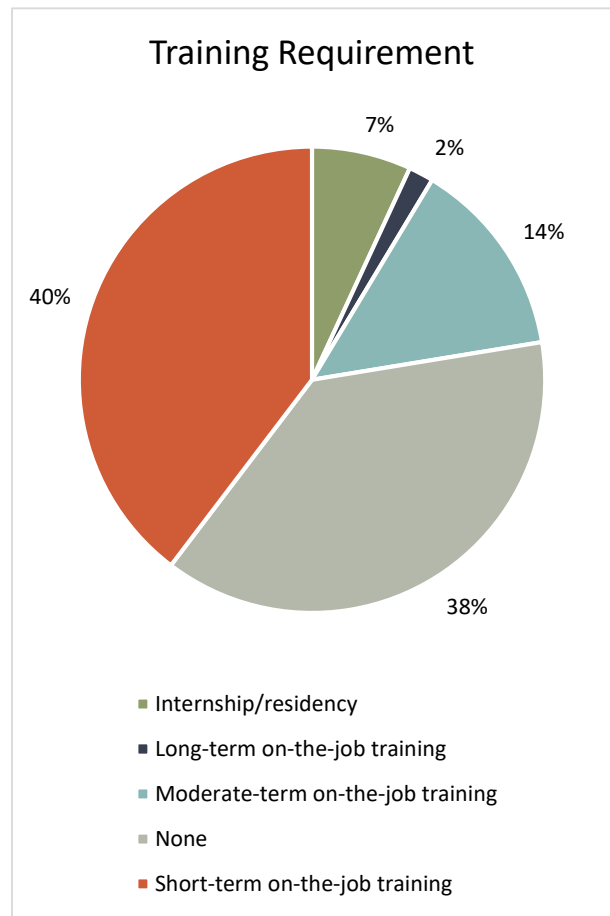
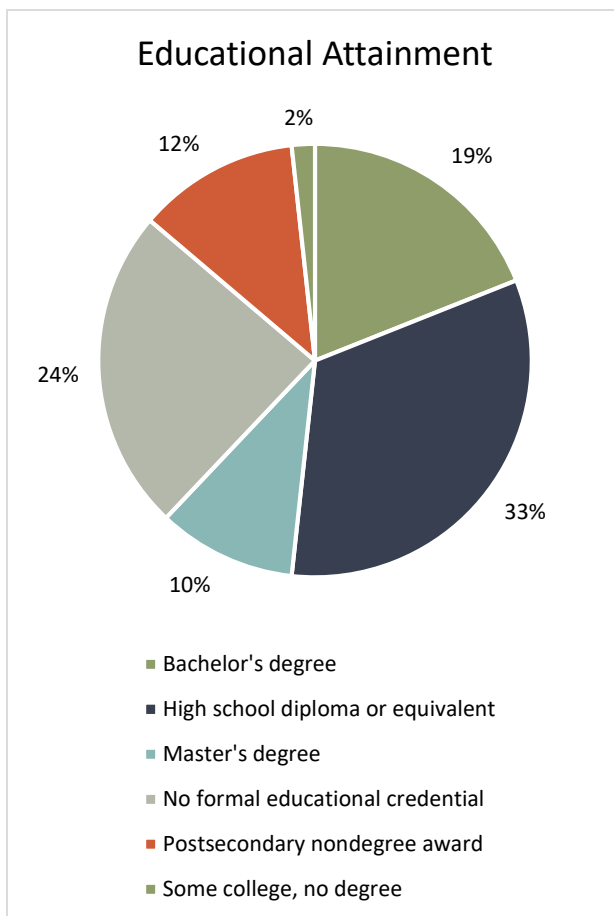
Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Projected Annual Openings	Median Hourly Earnings
Cashiers	1,211	106	10%	12	1%	243	\$12.12
Secretaries and Administrative Assistants	1,136	26	2%	7	1%	144	\$19.10
Building Cleaning Workers	1,067	62	6%	110	10%	164	\$12.92
Retail Salespersons	978	68	7%	77	8%	149	\$13.23
Cooks	894	120	16%	61	7%	150	\$13.53
Fast Food and Counter Workers	879	233	36%	123	14%	188	\$11.70
Grounds Maintenance Workers	856	134	19%	111	13%	123	\$14.14
Carpenters	854	96	13%	17	2%	98	\$20.27
Personal Care Aides	756	320	73%	207	27%	146	\$12.33
Miscellaneous Teachers and Instructors	733	91	14%	23	3%	105	\$16.20
Construction Laborers	675	55	9%	9	1%	80	\$14.31
Waiters and Waitresses	656	37	6%	52	8%	135	\$12.67
Office Clerks, General	644	(9)	(1%)	22	3%	83	\$16.78
Elementary and Middle School Teachers	603	129	27%	39	6%	68	\$35.24
General and Operations Managers	573	92	19%	52	9%	61	\$37.85
First-Line Supervisors of Sales Workers	531	11	2%	15	3%	58	\$16.38
Bookkeeping, Accounting, and Auditing Clerks	525	(6)	(1%)	12	2%	60	\$19.13
Driver/Sales Workers and Truck Drivers	525	37	8%	16	3%	63	\$20.54

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Projected Annual Openings	Median Hourly Earnings
Teacher Assistants	520	75	17%	27	5%	66	\$14.58
Laborers and Material Movers, Hand	509	32	7%	18	4%	80	\$13.80

Education & Training Requirements for High Demand Jobs

The top high demand jobs in Nevada County include Personal Care Aides; Nursing Assistants; Combined Food Preparation and Serving Workers, Including Fast Food; Landscaping and Groundskeeping Workers; and Retail Salespersons. Of all high demand jobs, 43% require some type of postsecondary educational attainment. Less than a quarter of all high demand jobs do not require formal educational credential (24%). Over 60% of all high demand jobs require some type of training requirement.

Average hourly earnings for high demand jobs range from \$12.08/hr. for Combined Food Preparation and Serving Workers, Including Fast Food to \$45.43/hr. for General and Operations Managers. Three-quarters of all the high demand jobs earn an hourly wage above \$15.00/hr. and of the top five high demand occupations, two exceed that threshold: Landscaping and Groundskeeping Workers (\$15.29) and Janitors and Cleaners, Except Maids and Housekeeping Cleaners (\$16.47).



Description	2023 Jobs	Change 2018 - 2023	Annual Openings	Avg. Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Personal Care Aides	963	207	161	\$13.02	High school diploma or equivalent	Short-term on-the-job training
Combined Food Preparation and Serving Workers, Including Fast Food	922	117	179	\$12.08	No formal educational credential	Short-term on-the-job training
Landscaping and Groundskeeping Workers	838	100	113	\$15.29	No formal educational credential	Short-term on-the-job training
Retail Salespersons	1,055	77	160	\$14.50	No formal educational credential	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	569	68	82	\$16.47	No formal educational credential	Short-term on-the-job training
Waiters and Waitresses	708	52	138	\$18.38	No formal educational credential	Short-term on-the-job training
General and Operations Managers	625	52	58	\$45.43	Bachelor's degree	None
Cooks, Restaurant	509	43	76	\$15.51	No formal educational credential	Moderate-term on-the-job training
Maids and Housekeeping Cleaners	592	40	82	\$12.82	No formal educational credential	Short-term on-the-job training
Maintenance and Repair Workers, General	482	37	52	\$20.32	High school diploma or equivalent	Moderate-term on-the-job training
Social and Human Service Assistants	265	37	36	\$21.94	High school diploma or equivalent	Short-term on-the-job training
Registered Nurses	513	33	31	\$44.56	Bachelor's degree	None
Correctional Officers and Jailers	293	32	29	\$34.83	High school diploma or equivalent	Moderate-term on-the-job training
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	222	29	27	\$22.51	Bachelor's degree	Internship/residency
Teacher Assistants	547	27	59	\$15.32	Some college, no degree	None
Elementary School Teachers, Except Special Education	575	26	44	\$36.88	Bachelor's degree	None
First-Line Supervisors of Food Preparation and Serving Workers	218	21	33	\$17.46	High school diploma or equivalent	None

Description	2023 Jobs	Change 2018 - 2023	Annual Openings	Avg. Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Automotive Service Technicians and Mechanics	232	20	25	\$20.85	Postsecondary nondegree award	Short-term on-the-job training
Medical Assistants	221	17	26	\$18.24	Postsecondary nondegree award	None
Home Health Aides	62	16	9	\$13.31	High school diploma or equivalent	Short-term on-the-job training

Industry and Occupation Connections

Industries drive economic growth, but the fuel that enables those industries to function are its workforce. Considering the importance of talent to supporting key regional industries, it is worth exploring the connections between significant industries and the occupations that are most critical to those industries. The following table identifies the top ten high demand occupations by 5-digit SOC codes and how they are connected to some of the region's key industries (2-digit NAICS). The most common key industry amongst the top occupations was Accommodation and Food Services.

Connection between Top Occupations and Key Industries	
Top Occupation	Key Industries
Personal Care Aides	<ul style="list-style-type: none"> Health Care and Social Assistance
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> Accommodation and Food Services
Landscaping and Groundskeeping Workers	<ul style="list-style-type: none"> Administrative and Support and Waste Management and Remediation Services Arts, Entertainment, and Recreation
Retail Salespersons	<ul style="list-style-type: none"> Retail Trade
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	<ul style="list-style-type: none"> Administrative and Support and Waste Management and Remediation Services
Waiters and Waitresses	<ul style="list-style-type: none"> Accommodation and Food Services Other Services (except Public Administration) Retail Trade
General and Operations Managers	<ul style="list-style-type: none"> Construction Professional, Scientific, and Technical Services Manufacturing Health Care and Social Assistance
Cooks, Restaurant	<ul style="list-style-type: none"> Accommodation and Food Services Accommodation and Food Services
Maids and Housekeeping Cleaners	<ul style="list-style-type: none"> Other Services (except Public Administration) Administrative and Support and Waste Management and Remediation Services
Maintenance and Repair Workers, General	<ul style="list-style-type: none"> Real Estate and Rental and Leading Government Other Services (except Public Administration) Accommodation and Food Services

DETAILED INDUSTRY ANALYSIS

The following section provides an in-depth look at 4-digit NAICS sectors that are important to the Nevada County economy. These industry sectors include: Health Care; Information Technology (IT); Manufacturing; and Tourism. For each of these sectors the top employing sub-sectors are listed by 4-digit NAICS code, as well as the staffing patterns for each sector. Staffing patterns data show the top employing occupations at the 4-digit SOC level, along with past and projected growth, competitive effect, location quotient and average earnings.

Employment for Top Health Care Industries

The largest employing Health Care sectors in Nevada County include Individual and Family Services (1,193 jobs); General Medical and Surgical Hospitals (816 jobs); Offices of Physicians (622 jobs); and Nursing Care Facilities (Skilled Nursing Facilities) (537 jobs). Of those sectors, only two are projected to growing over the next five years: Individual and Family Services; and Nursing Care Facilities (Skilled Nursing Facilities). Average earnings within the Health Care industry in Nevada County range from \$18,112 for Vocational Rehabilitation Services to \$102,145 for Offices of Physicians. The latter has a negative competitive effect score and is projected to experience the greatest decline of jobs than any other Health Care sector in the county.

Eight sectors have an LQ score above 1.25, indicating a specialization for the county, with the highest score belonging to Vocational Rehabilitation Services (1.95). This low-earning sector has experienced job growth over the last five years and is projected to experience twice as much growth over the next five years.

Industry	2018 Jobs	'13-'18 Change	CE '13-'18	'18-'23 Change	CE '18-'23	'18 LQ	Average Earnings
Individual and Family Services	1,193	254	5	286	18	1.89	\$23,601
General Medical and Surgical Hospitals	816	99	57	(10)	(48)	0.72	\$99,867
Offices of Physicians	622	25	(15)	(19)	(88)	0.96	\$102,145
Nursing Care Facilities (Skilled Nursing Facilities)	537	26	40	25	22	1.37	\$47,774
Offices of Other Health Practitioners	391	(13)	(95)	3	(63)	1.54	\$43,418
Outpatient Care Centers	379	229	175	176	92	1.62	\$57,283
Offices of Dentists	317	(19)	(46)	3	(28)	1.32	\$60,129
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	301	3	(19)	54	20	1.93	\$40,496
Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	214	(46)	(83)	(5)	(46)	0.94	\$32,016
Child Day Care Services	214	56	50	27	23	0.71	\$22,850
Vocational Rehabilitation Services	162	19	20	37	40	1.95	\$18,112
Home Health Care Services	114	(39)	(65)	(12)	(41)	0.31	\$46,583
Community Food and Housing, and Emergency and Other Relief Services	83	37	29	24	16	1.90	\$35,797
Other Ambulatory Health Care Services	39	(3)	(8)	2	(3)	0.47	\$86,051
Medical and Diagnostic Laboratories	21	11	9	8	5	0.30	\$65,092
Other Residential Care Facilities	<10	Insf. Data	(11)	Insf. Data	(1)	0.03	Insf. Data
Psychiatric and Substance Abuse Hospitals	0	0	0	0	0	0.00	\$0
Specialty (except Psychiatric and Substance Abuse) Hospitals	0	0	0	0	0	0.00	\$0

Staffing Patterns for Health Care

The top four highest employment 4-digit SOC categories for this industry sector include: Personal Care Aides (703 jobs); Miscellaneous Healthcare Support Occupations (389 jobs); Registered Nurses (348 jobs); and Secretaries and Administrative Assistants (326 jobs). Nearly all Health Care occupations experienced growth over the last five years with the exception of four: Nursing, Psychiatric, and Home Health Aides (39 jobs); Childcare Workers (11 jobs); Building Cleaning Workers (6 jobs); and Dental Hygienists (3 jobs). Dental Hygienists, which is projected to add only 1 job by 2023, has one of the county's highest median hourly earnings in the Health Care sector at \$51.40. Median hourly earnings range from \$11.01 for Childcare Workers to \$82.77 for Physicians and Surgeons. Projections over the next five years indicate job growth across all Health Care occupations with the greatest growth coming from Personal Care Aides (206 jobs).

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Personal Care Aides	703	311	79%	206	29%	\$12.33
Miscellaneous Healthcare Support Occupations	389	41	12%	21	5%	\$18.39
Registered Nurses	348	58	20%	31	9%	\$46.13
Secretaries and Administrative Assistants	326	24	8%	6	2%	\$19.10
Nursing, Psychiatric, and Home Health Aides	276	(39)	(12%)	28	10%	\$15.32
Counselors	239	30	14%	40	17%	\$20.36
Miscellaneous Community and Social Service Specialists	180	5	3%	28	16%	\$19.02
Therapists	152	18	13%	6	4%	\$40.60
Licensed Practical and Licensed Vocational Nurses	151	6	4%	7	5%	\$26.91
Childcare Workers	140	(11)	(7%)	9	6%	\$11.01
Building Cleaning Workers	121	(6)	(5%)	7	6%	\$12.92
Dental Hygienists	107	(3)	(3%)	1	1%	\$51.40
Physicians and Surgeons	105	7	7%	2	2%	\$82.77
Receptionists and Information Clerks	103	5	5%	5	5%	\$14.53
Social Workers	97	3	3%	18	19%	\$24.68
Psychologists	96	16	20%	10	10%	\$35.50
Office Clerks, General	90	3	3%	3	3%	\$16.78
Social and Community Service Managers	82	15	22%	12	15%	\$24.97
Recreation and Fitness Workers	76	3	4%	4	5%	\$18.19
Cooks	76	0	0%	4	5%	\$13.53

Employment for Top Information Technology Industries

Limited data is available for employment of information technology jobs. In Nevada County, Computer Systems Design and Related Services added 11 jobs over the last five years and is projected to add an additional 34 jobs by 2023. None of the sectors within the industry have an LQ score above 1.00, indicating very little specialization in Information Technology in Nevada County.

Industry	2018 Jobs	'13-'18 Change	CE '13-'18	'18-'23 Change	CE '18-'23	'18 LQ	Average Earnings
Computer Systems Design and Related Services	386	11	(71)	34	(19)	0.70	\$97,971
Data Processing, Hosting, and Related Services	<10	Insf. Data	(2)	Insf. Data	1	0.06	Insf. Data
Software Publishers	<10	Insf. Data	(2)	Insf. Data	(1)	0.09	Insf. Data

Staffing Patterns for Information Technology

Diving deeper into occupations within the Information Technology sector, limited growth has occurred over the last five years. Software Developers and Programmers, the top occupation, experienced a slight decrease in jobs, following Computer and Information Analysts (-4 jobs). Computer and Information Systems Managers is associated with the highest median hourly earnings of \$61.40, but the county only had 10 of those jobs in 2018. Projections into the next five years indicate very little growth. Software Developers and Programmers is projected to experience almost half of all top information technology occupation growth.

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Software Developers and Programmers	100	(3)	(3%)	9	9%	\$27.07
Computer Support Specialists	34	3	10%	3	9%	\$28.35
Computer and Information Analysts	22	(4)	(15%)	2	9%	\$39.67
Database and Systems Administrators and Network Architects	18	(2)	(10%)	1	6%	\$41.02
Miscellaneous Sales Representatives, Services	17	2	13%	2	12%	\$22.40
General and Operations Managers	16	2	14%	2	13%	\$37.85
Miscellaneous Computer Occupations	14	7	100%	1	7%	\$29.11
Miscellaneous Managers	11	3	38%	0	0%	\$18.82
Computer and Information Systems Managers	10	1	11%	1	10%	\$61.40
Computer Operators	<10	0	0%	0	0%	\$33.88
Nuclear Engineers	<10	0	0%	0	0%	\$68.38

Employment for Top Manufacturing Industries

The top employing sectors within the Manufacturing industry in Nevada County include Communications Equipment Manufacturing (310 jobs); Other Miscellaneous Manufacturing (142 jobs); Navigational, Measuring, Electromedical, and Control Instruments Manufacturing (134 jobs); and Beverage Manufacturing (107 jobs). Over the last five years, the industry's greatest job growth was concentrated in the Beverage Manufacturing sub-sector which added 56 jobs and is projected to add an additional 26 jobs by 2023. Due to competitive effect, Beverage Manufacturing added 14 jobs, second to Other General Purpose Machinery Manufacturing which added 21 jobs. Average earnings within the Manufacturing industry range from \$30,843 for Bakeries and Tortilla Manufacturing to \$109,791 for Communications Equipment Manufacturing. The latter also has the highest LQ score of 14.88.

Industry	2018 Jobs	'13-'18 Change	CE '13-18'	'18-'23 Change	CE '18-23	'18 LQ	Average Earnings
Communications Equipment Manufacturing	310	47	90	(62)	(25)	14.88	\$109,791
Other Miscellaneous Manufacturing	142	(28)	(40)	(6)	(7)	1.79	\$56,705
Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	134	(41)	(47)	(19)	(18)	1.36	\$83,781
Beverage Manufacturing	107	56	35	26	14	1.68	\$33,584
Bakeries and Tortilla Manufacturing	85	5	(3)	14	10	1.06	\$30,843
Other Wood Product Manufacturing	85	36	28	22	20	1.40	\$46,693
Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	82	14	15	2	0	0.92	\$57,532
Household and Institutional Furniture and Kitchen Cabinet Manufacturing	58	(27)	(35)	(4)	(4)	0.89	\$39,960
Other General Purpose Machinery Manufacturing	54	21	19	21	21	0.82	\$95,965
Cement and Concrete Product Manufacturing	51	0	(8)	(3)	(4)	1.07	\$87,574
Architectural and Structural Metals Manufacturing	46	2	(3)	15	13	0.49	\$56,090
Printing and Related Support Activities	45	4	7	(8)	(4)	0.41	\$36,040
Motor Vehicle Parts Manufacturing	43	(19)	(29)	(2)	(4)	0.30	\$61,297
Motor Vehicle Body and Trailer Manufacturing	38	27	25	(4)	(7)	0.95	\$36,029
Semiconductor and Other Electronic Component Manufacturing	35	(38)	(37)	(1)	0	0.39	\$54,104
Forging and Stamping	34	(1)	(2)	2	3	1.39	\$82,802
Industrial Machinery Manufacturing	33	Insf. Data	22	11	12	1.12	\$86,810
Medical Equipment and Supplies Manufacturing	25	2	2	4	2	0.32	\$61,397
Electrical Equipment Manufacturing	21	(6)	(5)	(5)	(5)	0.63	\$92,358
Other Transportation Equipment Manufacturing	21	(33)	(37)	(11)	(11)	2.50	\$61,839

Staffing Patterns for Manufacturing

The top Manufacturing occupations in Nevada County include Miscellaneous Production Workers (69 jobs); Miscellaneous Managers (55 jobs); Sales Representatives, Wholesale and Manufacturing (54 jobs); and Miscellaneous Assemblers and Fabricators (53 jobs). Over the last five years, several of the top Manufacturing occupations experienced a decline in jobs. The greatest dip was by Miscellaneous Assemblers and Fabricators, which lost 10 jobs. Projections into 2023 indicate very minimal job growth by Manufacturing occupations in Nevada County. The greatest projected increase in employment is Laborers and Material Movers, Hand; and Chemical Processing Machine Setters, Operators, and Tenders, each adding 4 jobs. Median hourly earnings range from \$12.53/hr. for Miscellaneous Production Workers to \$42.49/hr. for Industrial Engineering, Including Health and Safety.

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Miscellaneous Production Workers	69	(3)	(4%)	1	1%	\$12.53
Miscellaneous Managers	55	4	8%	2	4%	\$18.82
Sales Representatives, Wholesale and Manufacturing	54	1	2%	1	2%	\$22.68
Miscellaneous Assemblers and Fabricators	53	(10)	(16%)	2	4%	\$15.99
Laborers and Material Movers, Hand	52	(9)	(15%)	4	8%	\$13.80
Electrical, Electronics, and Electromechanical Assemblers	48	(6)	(11%)	(8)	(17%)	\$14.07
Shipping, Receiving, and Traffic Clerks	47	1	2%	(2)	(4%)	\$22.11
Inspectors, Testers, Sorters, Samplers, and Weighers	46	(1)	(2%)	(5)	(11%)	\$23.78
General and Operations Managers	45	3	7%	(1)	(2%)	\$37.85
First-Line Supervisors of Production and Operating Workers	43	(2)	(4%)	3	7%	\$26.12
Electrical and Electronics Engineers	37	(8)	(18%)	(4)	(11%)	\$29.03
Cabinetmakers and Bench Carpenters	37	(3)	(8%)	(2)	(5%)	\$18.39
Welding, Soldering, and Brazing Workers	35	4	13%	4	11%	\$22.45
Driver/Sales Workers and Truck Drivers	35	5	17%	3	9%	\$20.54
Architectural and Engineering Managers	31	(1)	(3%)	(4)	(13%)	\$35.04
Secretaries and Administrative Assistants	30	0	0%	(2)	(7%)	\$19.10
Software Developers and Programmers	26	(1)	(4%)	(1)	(4%)	\$27.07
Chemical Processing Machine Setters, Operators, and Tenders	24	14	140%	4	17%	\$16.42
Bookkeeping, Accounting, and Auditing Clerks	23	(3)	(12%)	(1)	(4%)	\$19.13
Industrial Engineers, Including Health and Safety	23	0	0%	1	4%	\$42.49

Employment for Top Tourism Industries

The Tourism industry in Nevada County is more significant than other counties in the NoRTEC region. The top jobs within the industry include Restaurants and Other Eating Places (2,921 jobs); Other Amusement and Recreation Industries (1,241 jobs); Traveler Accommodation (548 jobs); and Independent Artists, Writers, and Performers (204 jobs). Over the last five years, the tourism sub-sectors remained relatively stagnant, however, Other Amusement and Recreation Industries experienced a decline in over 250 jobs. Projections into 2023 indicate positive job growth for all Tourism sub-sectors. Average earnings within the Tourism industry range from \$19,377 for Drinking Places (Alcoholic Beverages) to \$41,227 for Travel Arrangement and Reservation Services. Compared to other target industries, the Tourism industry has lower average earnings.

Industry	2018 Jobs	'13-'18 Change	CE '13-18'	'18-'23 Change	CE '18-23	'18 LQ	Average Earnings
Restaurants and Other Eating Places	2,921	494	157	267	44	1.12	\$24,187
Other Amusement and Recreation Industries	1,241	(279)	(550)	8	(98)	3.53	\$30,301
Traveler Accommodation	548	(20)	(67)	31	12	1.16	\$39,985
Independent Artists, Writers, and Performers	204	27	14	11	5	2.76	\$20,839
Special Food Services	172	3	(23)	7	(11)	0.86	\$22,659
RV (Recreational Vehicle) Parks and Recreational Camps	158	93	82	24	4	9.37	\$24,518
Drinking Places (Alcoholic Beverages)	135	51	44	33	33	1.39	\$19,377
Promoters of Performing Arts, Sports, and Similar Events	40	22	17	8	2	0.99	\$33,088
Other Support Services	39	6	4	9	7	0.49	\$40,079
Travel Arrangement and Reservation Services	39	3	(3)	2	3	0.65	\$41,227
Museums, Historical Sites, and Similar Institutions	30	11	7	8	5	0.71	\$32,940
Performing Arts Companies	26	5	2	3	2	0.69	\$33,321
Spectator Sports	22	1	(1)	0	(1)	0.46	\$20,298
Rooming and Boarding Houses, Dormitories, and Workers' Camps	<10	Insf. Data	(1)	Insf. Data	(0)	0.50	Insf. Data
Scenic and Sightseeing Transportation, Water	<10	Insf. Data	(1)	Insf. Data	(0)	0.14	Insf. Data
Amusement Parks and Arcades	<10	Insf. Data	(1)	Insf. Data	(1)	0.14	Insf. Data
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	<10	Insf. Data	5	Insf. Data	1	1.00	Insf. Data
Gambling Industries	<10	Insf. Data	3	Insf. Data	2	0.28	Insf. Data
Scenic and Sightseeing Transportation, Other	0	0	0	0	0	0.00	\$0
Scenic and Sightseeing Transportation, Land	0	Insf. Data	(1)	0	0	0.00	\$0

Staffing Patterns for Tourism⁸

The most concentrated occupations within the Tourism industry are Fast Food and Counter Workers (747 jobs); Cooks (741 jobs); and Waiters and Waitresses (633 jobs). These occupations have increased considerably in employment size since 2013 with Fast Food and Counter Workers adding the most jobs (227), however, this occupation is associated with the second-lowest median hourly earnings of all Tourism occupations. Projections into the next five years indicate positive job growth for all occupations with the exception of Recreation and Fitness Workers, which is projected to experience a 10% decrease in employment (21 jobs).

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Fast Food and Counter Workers	747	227	44%	115	15%	\$11.70
Cooks	741	110	17%	54	7%	\$13.53
Waiters and Waitresses	633	32	5%	49	8%	\$12.67
Dishwashers	284	2	1%	12	4%	\$11.92
Building Cleaning Workers	235	(13)	(5%)	16	7%	\$12.92
Miscellaneous Entertainment Attendants and Related Workers	216	11	5%	10	5%	\$12.44
Recreation and Fitness Workers	213	(93)	(30%)	(21)	(10%)	\$18.19
Supervisors of Food Preparation and Serving Workers	205	33	19%	22	11%	\$15.48
Food Preparation Workers	160	8	5%	13	8%	\$13.33
Bartenders	156	25	19%	21	13%	\$12.86
Cashiers	154	26	20%	10	6%	\$12.12
Dining Room and Cafeteria Attendants and Bartender Helpers	152	11	8%	10	7%	\$11.36
Grounds Maintenance Workers	129	2	2%	12	9%	\$14.14
Athletes, Coaches, Umpires, and Related Workers	119	(9)	(7%)	3	3%	\$22.56
Food Service Managers	95	(1)	(1%)	3	3%	\$14.38
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	85	10	13%	7	8%	\$12.47
Maintenance and Repair Workers, General	77	12	18%	7	9%	\$18.92
General and Operations Managers	68	7	11%	5	7%	\$37.85
Musicians, Singers, and Related Workers	62	6	11%	4	6%	\$18.42
Hotel, Motel, and Resort Desk Clerks	62	0	0%	5	8%	\$14.88

⁸ The Tourism industry crosses over several industries, including NAICS 48 (Transportation and Warehousing); 56 (Administrative and Support Services); 71 (Arts, Entertainment, and Recreation); and 72 (Accommodation and Food Services).

APPENDIX

Data Sources and Glossary of Key Terms

Data Sources

All data and analysis for this report are directly or indirectly derived from information provided by either the U.S. Bureau of the Census or U.S. Bureau of Labor Statistics:

- Economic Modeling Specialists International (EMSI), 2018.4 Class of Worker data (based on the U.S. Quarterly Census of Employment and Wages) and general demographic estimates
- U.S. Census American Community Survey 2012-2016 Estimates
- U.S. Census OnTheMap

Competitive Effect

Used in conjunction with "Shift-Share Analysis" techniques⁹, *The Competitive Effect* metric seeks to isolate the influence of local dynamics from the influence of non-local factors on industries' employment growth or decline. A positive number indicates that the study area experienced more growth within a particular industry than would have been expected from non-local trends; the magnitude of *The Competitive Effect* indicates the strength of the purely local influence on the industry's employment change.

Location Quotient

Location Quotient (LQ) measures the relative importance of an industry's employment to a particular region, and uses the straightforward formula:

$$LQ = [\% \text{ of total local employment} / \% \text{ of total national employment}]$$

Location Quotients are one of the most common and important indicators of local economic characteristics; LQ's greater than 1.25 are typically considered to be the threshold for identifying an industry as especially relatively strong.

NAICS Codes (The North American Industry Classification System)

NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The numbering structure is hierarchical in nature, meaning that fewer digits are broader in their meaning, while longer (up to six) digits provide greater specificity.

⁹ Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors. Shift share helps answer why employment is growing or declining in a regional industry, cluster, or occupation.

SOC Codes (Standard Occupational Classification)

The 2000 Standard Occupational Classification (SOC) System was developed in response to a growing need for a universal occupational classification system. Such a classification system allows government agencies and private industry to produce comparable data. Users of occupational data include government program managers, industrial and labor relations practitioners, students considering career training, job seekers, vocational training schools, and employers wishing to set salary scales or locate a new plant. It is used by federal agencies collecting occupational data, providing a standard means to compare such data across agencies. It is designed to cover all occupations in which work is performed for pay or profit, reflecting the current occupational structure in the United States.

As with NAICS, the SOC coding structure is hierarchical, with fewer digits provide broad data (occupational categories), while larger provide more specific data (specific professions).

Industry Sector Definitions

Health Care

NAICS	Description
6241	Individual and Family Services
6211	Offices of Physicians
6214	Outpatient Care Centers
6212	Offices of Dentists
6242	Community Food and Housing, and Emergency and Other Relief Services
6244	Child Day Care Services
6213	Offices of Other Health Practitioners
6219	Other Ambulatory Health Care Services
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6243	Vocational Rehabilitation Services
6239	Other Residential Care Facilities
6222	Psychiatric and Substance Abuse Hospitals
6221	General Medical and Surgical Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities (Skilled Nursing Facilities)
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities

Information Technology

NAICS	Description
5112	Software Publishers
5182	Data Processing, Hosting, and Related Services
5415	Computer Systems Design and Related Services

Manufacturing

NAICS	Description
3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3131	Fiber, Yarn, and Thread Mills

NAICS	Description
3132	Fabric Mills
3133	Textile and Fabric Finishing and Fabric Coating Mills
3141	Textile Furnishings Mills
3149	Other Textile Product Mills
3151	Apparel Knitting Mills
3152	Cut and Sew Apparel Manufacturing
3159	Apparel Accessories and Other Apparel Manufacturing
3161	Leather and Hide Tanning and Finishing
3162	Footwear Manufacturing
3169	Other Leather and Allied Product Manufacturing
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3254	Pharmaceutical and Medicine Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3272	Glass and Glass Product Manufacturing
3273	Cement and Concrete Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3321	Forging and Stamping
3322	Cutlery and Handtool Manufacturing
3323	Architectural and Structural Metals Manufacturing
3324	Boiler, Tank, and Shipping Container Manufacturing
3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities

NAICS	Description
3329	Other Fabricated Metal Product Manufacturing

Tourism

NAICS	Description
7225	Restaurants and Other Eating Places
4841	General Freight Trucking
4931	Warehousing and Storage
7211	Traveler Accommodation
4842	Specialized Freight Trucking
5617	Services to Buildings and Dwellings
7113	Promoters of Performing Arts, Sports, and Similar Events
4922	Local Messengers and Local Delivery
5629	Remediation and Other Waste Management Services
5611	Office Administrative Services
7139	Other Amusement and Recreation Industries
4884	Support Activities for Road Transportation
7115	Independent Artists, Writers, and Performers
5614	Business Support Services
7224	Drinking Places (Alcoholic Beverages)
5616	Investigation and Security Services
5619	Other Support Services
7223	Special Food Services
5621	Waste Collection
4821	Rail Transportation