



**Northern Rural Training and  
Employment Consortium (NoRTEC)**

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# **Del Norte 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 Del Norte 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 Del Norte County significantly trails rates for California and the United States. Over the prior ten years, population decreased by 4% for Del Norte County while population increased by 9% for the state and 8% for the nation.
- Del Norte County has an aging population. Over the last ten years, individuals 55 years and older were the only age category to experience growth. Projections into 2023 show that population growth will occur most significantly by individuals over 65 years of age.
- Educational attainment by individuals in Del Norte County lags behind the NoRTEC region, state, and nation beyond a Bachelor's degree or higher. More individuals in the county have a high school diploma compared to any other level of educational attainment.
- Del Norte County experiences a net loss of talent due to out-commuting. Though 5,575 individuals both live and work in the County, 2,965 live in the County and work elsewhere.
- Income levels in Del Norte County are fairly low, which results in a considerable need for social services. Median household income in the county is \$41,287 and over 23% of the area population is in poverty. Likewise, 19% of the county population receives CalFresh.
- As of December 2018, there were 9,665 individuals in the Del Norte County labor force, of which 606 were unemployed.
- Since the 2016 version of this report was released, the Del Norte County economy has expanded at an average annual rate of 0.3%. The sectors driving the upward growth include Health Care & Social Services, and Accommodation & Food Services. These sectors added over 180 jobs, accounting for over half of the county's net new job growth. Meanwhile only the Government sector performed poorly in terms of job growth, seeing a 6.1% (237 in numeric terms) decrease in employment over the past two years.

- Between 2016 and 2018, Del Norte County's population decreased slightly by 0.3% (-90 in numeric terms). The highest growth age groups included those ages 70 to 74 years, and those 10 to 14 years; while the largest decrease was seen in those ages 50 to 54. The largest decrease by race/ethnicity group included White Hispanics and White, Non-Hispanics.

## Industry & Occupation Highlights

- Del Norte County's largest industry sectors include Government; Health Care and Social Assistance; Retail Trade; Accommodation and Food Services; Agriculture, Forestry, Fishing and Hunting; and Construction. Government has more jobs than the next three industries combined in Del Norte County.
- Health Care and Social Assistance was the only industry to add a significant number of jobs over the last five years (+131 jobs). Sectors that experienced the greatest decline in the same time period include Retail Trade; and Transportation and Warehousing.
- Individual (4-digit North American Industry Classification System (NAICS) Code) industries with strong growth prospects for the county include: Individual and Family Services; General Merchandise Stores, including Warehouse Clubs and Supercenters; Nursing Care Facilities (Skilled Nursing Facilities); and Outpatient Care Centers.
- Because Del Norte County has an aging population, it is not surprising to see a future demand and growth within the healthcare industry. As the baby boomer generation prepares to exit the workforce, the county will be in need of talent to back fill those jobs and care for older individuals in hospitals, nursing homes, and outpatient care facilities.

# 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 Del Norte County.

- Not being adjacent to Shasta or Butte Counties, Del Norte 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.
- Del Norte County has little presence of forest fire suppression contractors, meaning that it experienced little to no temporary economic boost from suppression efforts in the fourth quarter of 2018.

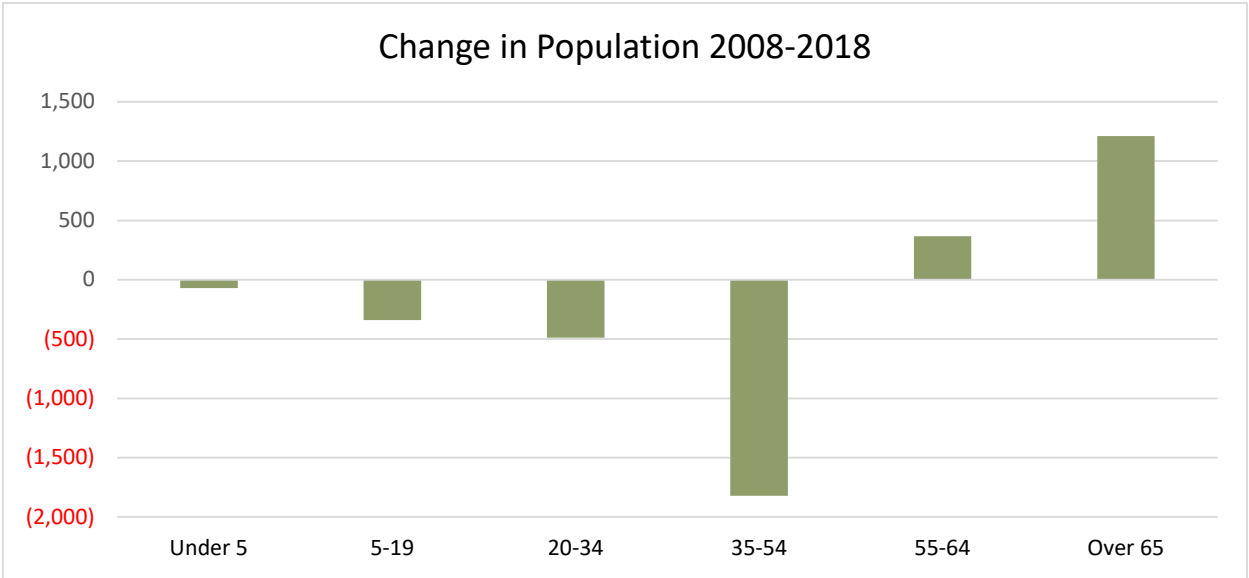
# DEMOGRAPHIC & LABOR FORCE CHARACTERISTICS

## Total Population

Del Norte County is geographically located in the most northwestern part of the NoRTEC region. The population in the county has declined by less than 1,200 over the last ten years and is projected to remain generally stagnant over the next five years. Compared to the state and national figures, Del Norte County has experienced a significant declining population. 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%.

Over the past ten years, the only age categories that have increased are those 55 and older. Combined, these individuals have increased by 1,578, or 21.5%. In that same time, the population of those 54 and younger decreased by 2,719 and is projected to decreased by another 412 over the next five years. The aging population is a concern for the local economy as the available labor will continue to be scarce. Those between the ages of 20-54 have consistently decreased since 2008, causing much concern for future talent needs.

Age	2008 Population	2018 Population	Change 2008-2018	% Change 2008-2018	Projected Change 2018-2023	
Under 5	1,668	1,598	(70)	(4%)	83	5%
5-19	5,179	4,839	(340)	(7%)	7	0%
20-34	5,734	5,247	(487)	(8%)	(372)	(7%)
35-54	8,566	6,744	(1,822)	(21%)	(130)	(2%)
55-64	3,582	3,949	367	10%	(394)	(10%)
Over 65	3,771	4,982	1,211	32%	767	15%
Total	28,497	27,358	(1,139)	(4%)	(37)	0%



## Race/Ethnicity

The population of the region is predominately White, with nearly 70% identifying as White in 2018, followed by 18% identifying as Hispanic. The top fastest growing race/ethnicity groups in the county are Native Hawaiian or Pacific Islander and Two or More Races.<sup>1</sup> The fastest decline in race/ethnicity groups in Del Norte County are Black (-29%) and White (-8%).

Race/Ethnicity	2018 Population	Change 2008-2018	% Change 2008-2018
White	18,877	(1,587)	(8%)
Hispanic	4,948	351	7%
American Indian or Alaskan Native	1,837	131	7%
Black	1,072	(313)	(29%)
Two or More Races	880	270	31%
Asian	856	(2)	0%
Native Hawaiian or Pacific Islander	25	13	52%

## Educational Attainment

Most individuals in Del Norte County have a high school diploma, followed by some college, and a 9<sup>th</sup> grade to 12<sup>th</sup> grade educational attainment. The percentage of individuals with a high school diploma exceeds that of the NoRTEC region, but compared to the NoRTEC region, California, and U.S., Del Norte County has a lower percentage of individuals with a Bachelor's degree or higher.

Education Level	2018 Del Norte County Population	2018 Del Norte County Percent	2018 Percent NoRTEC	2018 Percent California	2018 Percent US
Less Than 9th Grade	1,131	5.8%	4.9%	11.8%	6.8%
9th Grade to 12th Grade	2,345	12.1%	6.9%	7.0%	6.9%
High School Diploma	6,344	32.6%	25.3%	20.8%	27.6%
Some College	5,256	27.0%	30.5%	21.4%	20.7%
Associate's Degree	1,627	8.4%	9.8%	7.6%	8.0%
Bachelor's Degree	1,580	8.1%	15.0%	19.9%	18.6%
Graduate Degree and Higher	1,161	6.0%	7.6%	11.6%	11.3%

## Income

Compared with neighboring counties in the NoRTEC region, Del Norte County has the highest poverty rate at 23.2%, which is higher than the state rate of 15.1% and national rate of 14.6%.<sup>2</sup> Del Norte County's Median Household Income (\$41,287) ranks 8 out of 11 of the NoRTEC counties and is well below that of California and United States. This is \$19,323 less than the highest median household income in the region and more than \$4,724 from the lowest median household income in the region.

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

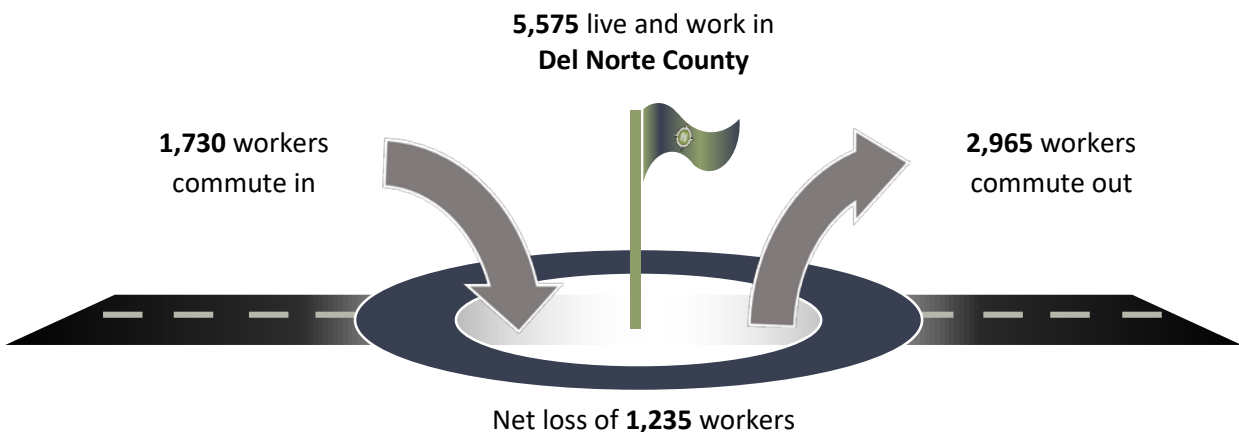
<sup>2</sup> U.S. Census Bureau 2013-2017

County	Median Household Income 2013-2017	Poverty Rate
Butte	\$46,516	20.5%
<b>Del Norte</b>	<b>\$41,287</b>	<b>23.2%</b>
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 Del Norte County in 2015. With 2,965 workers commuting out of the county and 1,730 commuting into the county, a net loss of 1,235 workers is experienced in Del Norte County. Over 5,500 individuals work and live in the county. Of those commuting into Del Norte County, 53.8% are workers between the ages of 30 and 54, and 47.2% earn more than \$3,333 per month. Compared to those commuting out of Del Norte County, 34.6% 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, Community and Social Services Occupations; Life, Physical, and Social Science Occupations; Legal Occupations; and Architecture and Engineering Occupations were the only groups which experience a net gain of in-commuters to the county. A larger number of county residents commute outside of the county for employment. The largest occupation groups for out-commuters are Sales and Related Occupations; Food Preparation and Serving Related Occupations; and Transportation and Material Moving Occupations.





Occupation Group	2018 Commuters
Protective Service Occupations	65 in-commuters
Community and Social Service Occupations	29 in-commuters
Life, Physical, and Social Science Occupations	12 in-commuters
Legal Occupations	6 in-commuters
Architecture and Engineering Occupations	3 in-commuters
Arts, Design, Entertainment, Sports, and Media Occupations	2 out-commuters
Business and Financial Operations Occupations	10 out-commuters
Military-only occupations	12 out-commuters
Computer and Mathematical Occupations	16 out-commuters
Building and Grounds Cleaning and Maintenance Occupations	19 out-commuters
Education, Training, and Library Occupations	28 out-commuters
Installation, Maintenance, and Repair Occupations	30 out-commuters
Healthcare Support Occupations	38 out-commuters
Healthcare Practitioners and Technical Occupations	47 out-commuters
Management Occupations	49 out-commuters
Production Occupations	68 out-commuters
Construction and Extraction Occupations	70 out-commuters
Personal Care and Service Occupations	92 out-commuters
Farming, Fishing, and Forestry Occupations	98 out-commuters
Office and Administrative Support Occupations	142 out-commuters
Transportation and Material Moving Occupations	143 out-commuters
Food Preparation and Serving Related Occupations	189 out-commuters
Sales and Related Occupations	255 out-commuters

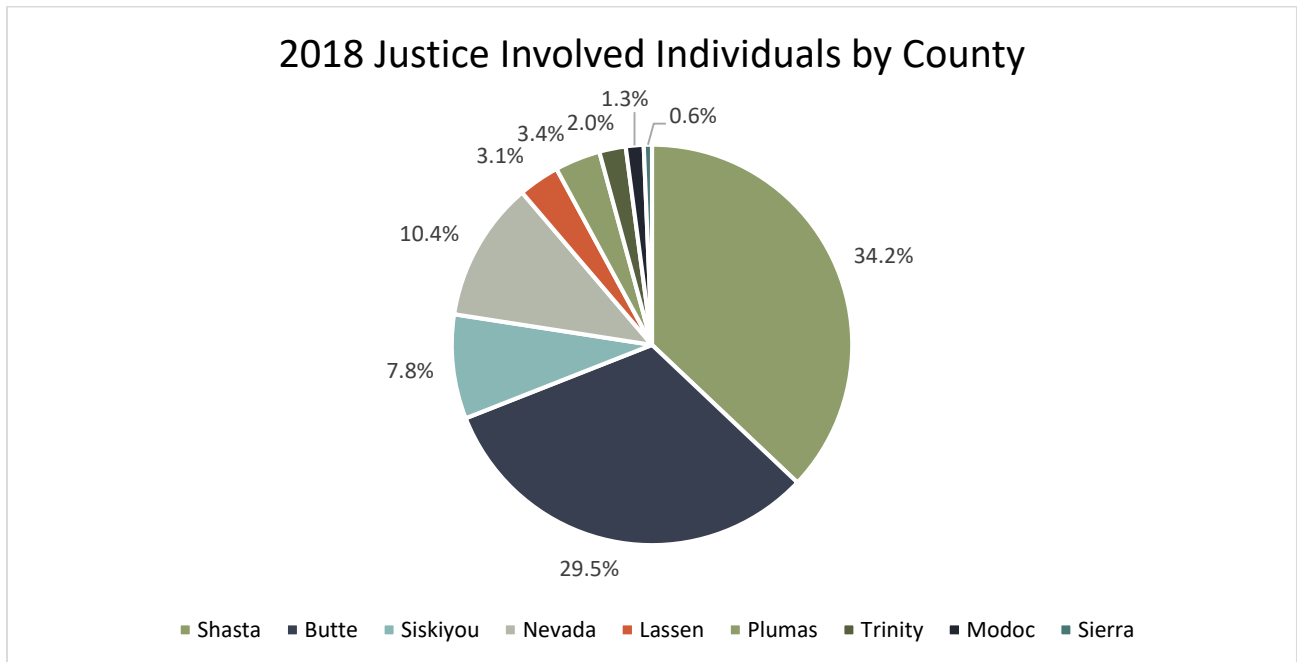
## Special Populations

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.<sup>3</sup>

The largest share of activity stems from Shasta County (34.2%) followed by Butte County (29.5%) and Siskiyou County (7.8%). Data was unavailable from the source for Del Norte County. In the NoRTEC region in 2017, there were a total of 7,372 individuals involved in felony probations, misdemeanor probations, or mandatory supervision.



<sup>3</sup> 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
<b>Del Norte</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
Sierra	28	15	1	1	45

## CalFresh Recipients

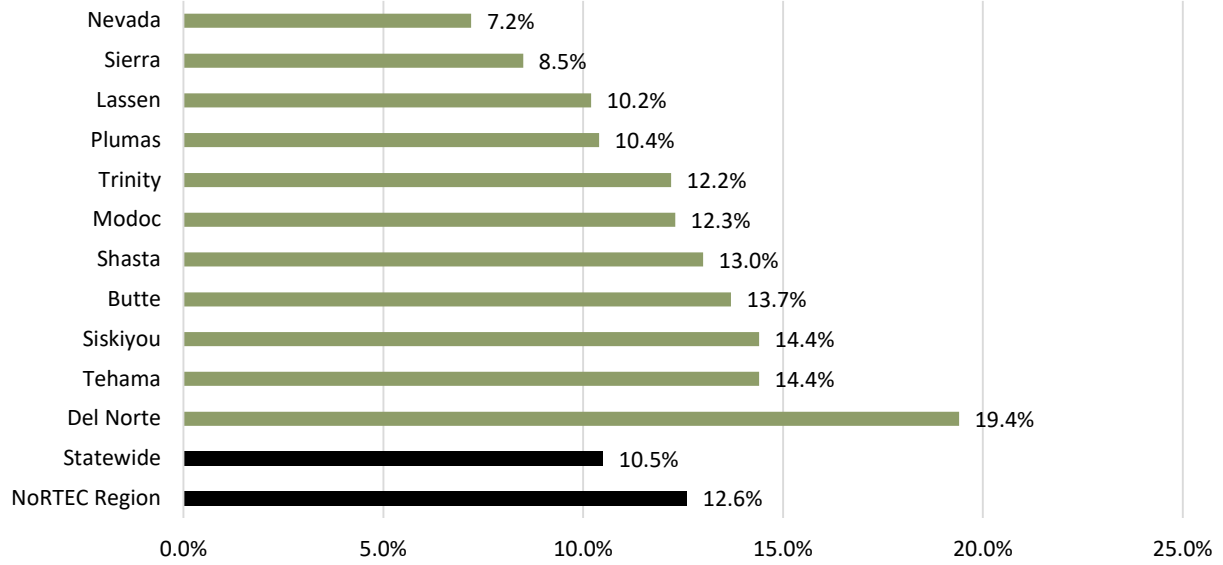
CalFresh, the California implementation of Supplemental Nutrition Assistance Program (SNAP), is received by larger percentage of NoRTEC area residents than statewide residents.<sup>4</sup> In Del Norte County, 19.4% of individuals receive CalFresh, the largest of any county in the NoRTEC region. For 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 different in Del Norte County. Between 2012 and 2013, the number of individuals enrolled in CalFresh declined but increased slightly the following year. Since 2016, the number of enrolled individuals has continued to decline to figures comparable to those between 2012-2013.

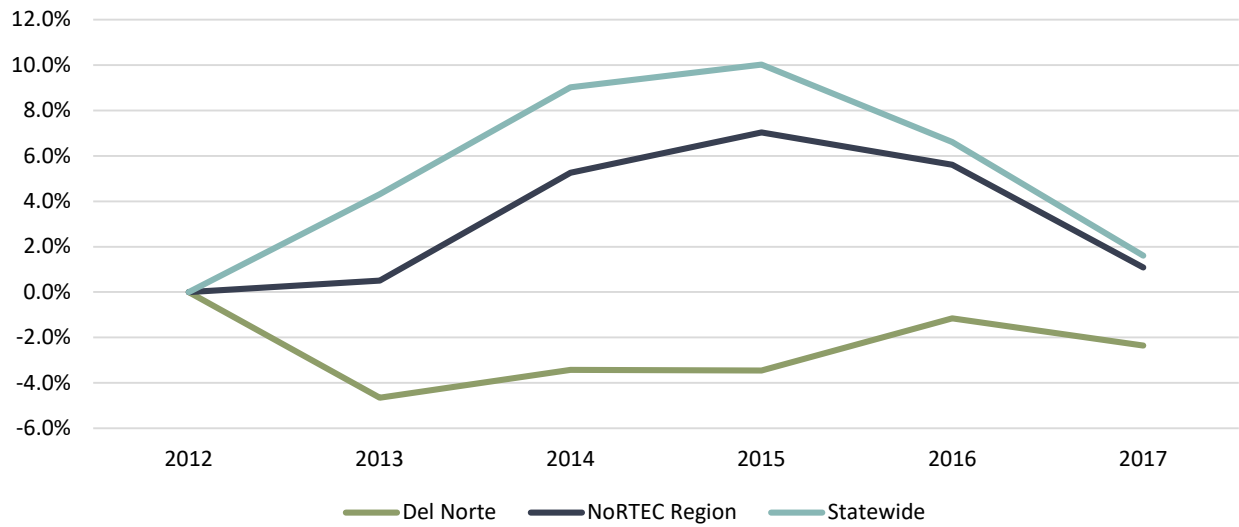
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<sup>4</sup> Data for this section are derived from the California Department of Social Services, CalFresh Data Dashboard, <https://www.cdss.ca.gov/inforesources/Data-Portal/Research-and-Data/CalFresh-Data-Dashboard>.

### Percent of Population Receiving CalFresh Benefits



### Cumulative Growth Rate in CalFresh Enrollment 2012-2017



# 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 DEL NORTE COUNTY 1998-2018 <sup>5</sup>		
Peak	September 2009 (10,713)	December 2018 (9,059 – 15% lower)
Trough	February 1998 (8,645)	December 2018 (9,059 – 5% higher)
December 2018	Employment: 9,059 Labor Force: 9,665 Unemployment rate: 6.3%	

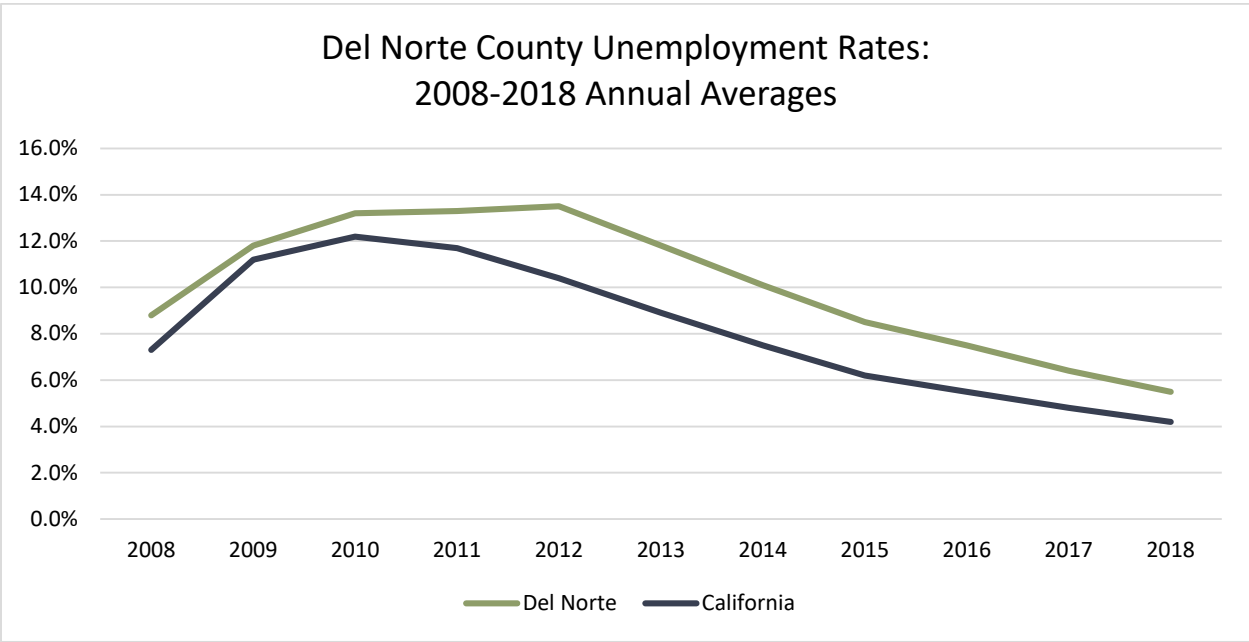
Labor force statistics include both the employed and the unemployed, excluding only those who have stopped looking for work (discouraged workers) and those who are voluntarily not in the labor force. In December 2018, 9,665 individuals participated in the Del Norte County labor force, of these, 9,059 were employed and 606 were unemployed<sup>6</sup>. Over the last 20 years, employment in the county was at its highest in September 2009 and lowest in February 1998. As of December 2018, the unemployment rate was 6.3%, higher than the unemployment rate of California (4.1%) and the United States (3.9%).

## 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.<sup>7</sup> 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.

Workers in older age brackets and those who are retirement age, compose a considerable proportion of Del Norte County’s population. The older worker population (55 to 64 years of age) was estimated to be 3,949 in 2018, which is equivalent to 14% of the county’s population.<sup>8</sup> A large number of these older workers are expected to retire in the next ten years. Even more notably, those who are 65 years and older were estimated to total 4,982, equivalent to 18% of the county’s population.

<sup>5</sup> U.S. Bureau of Labor Statistics, 1998.4-2018.4. <http://www.bls.gov/data/>  
<sup>6</sup> December of 2018 was used as comparison throughout the 1998-2008 timeframe.  
<sup>7</sup> 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 2012, Del Norte County’s unemployment rate has continued to decline to 5.5% in 2018. The unemployment rate for the county has been higher than California over the period analyzed. In 2009, the unemployment rates for the two areas was relatively close, with Del Norte County experiencing 11.8% unemployment and California experiencing 11.2% unemployment.

# INDUSTRY SECTOR ANALYSIS

To this point, the analysis of Del Norte 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 Del Norte 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.<sup>9</sup>

## Industry Mix

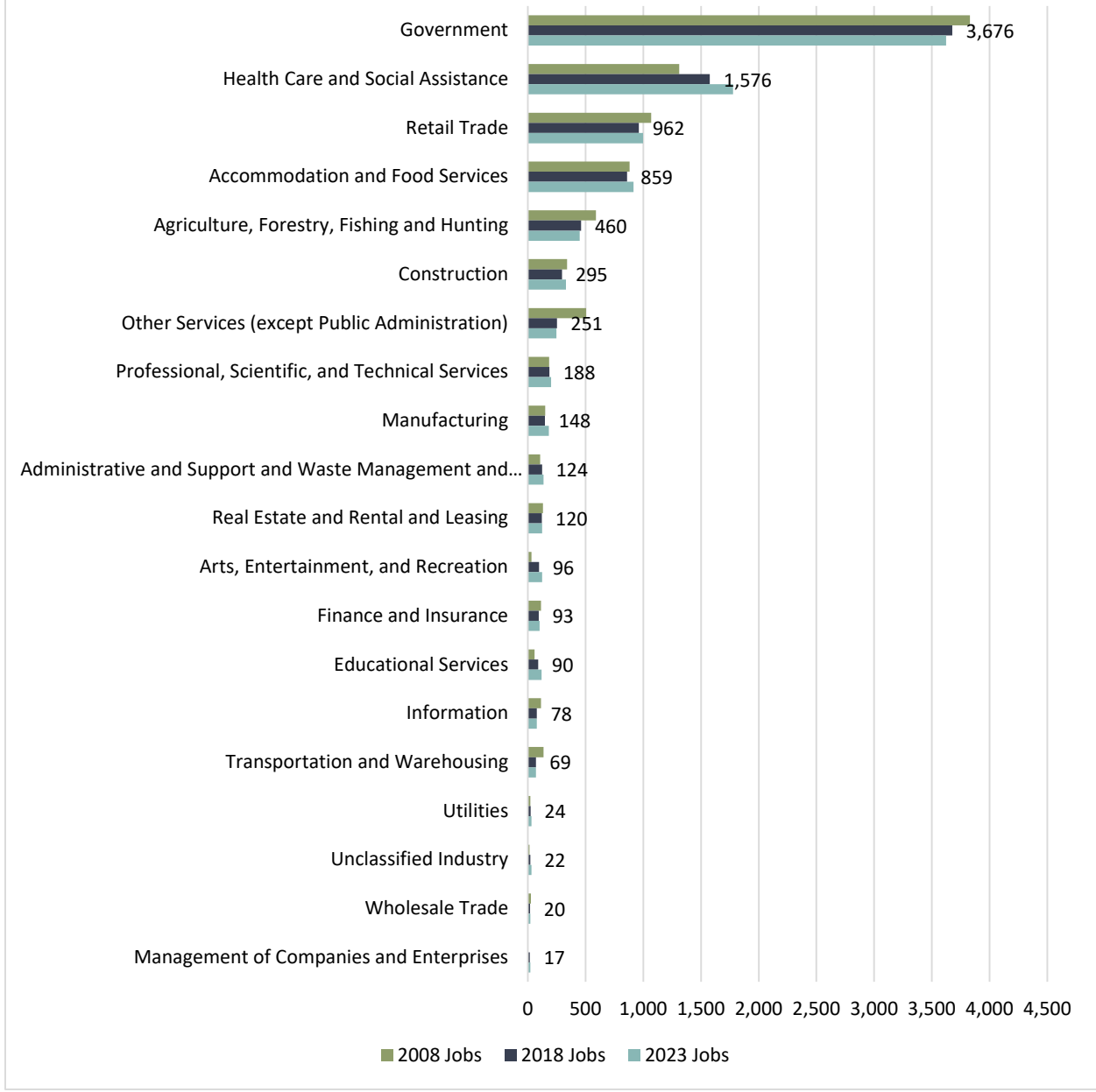
The broad industry sectors in Del Norte County employing the most workers are Government (3,676; 40%); Health Care and Social Assistance (1,576; 17%); Retail Trade (962; 10%); and Accommodation and Food Services (859; 9%).

Of the top five industries, Health Care and Social Assistance added the most jobs over the last five years (131 jobs), followed by Accommodation and Food Services (119 jobs); Government (64 jobs); and Agriculture, Forestry, Fishing and Hunting (12 jobs). Over that same time period, Retail Trade experienced the greatest decline in jobs (27) amongst all industries.

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<sup>9</sup> Data from this section are from Economic Modeling Specialists International (EMSI), 2019.2 Class of Worker.

## Del Norte County Jobs 2-digit Industry Sector



Looking deeper into job change in the county, competitive effect reveals how many jobs were created or retained due uniquely to characteristics of Del Norte County. According to these data, Manufacturing is the strongest, adding 50 jobs due to competitive effect. Other sectors that added significant jobs due to competitive effect include Educational Services (35 jobs); Other Services (except Public Administration) (30 jobs); and Accommodation and Food Services (23 jobs). Retail Trade had the opposite effect, experiencing a loss of 75 jobs due to competitive effect.

Industries with the strongest location quotient score in Del Norte County (above 1.25) include Agriculture, Forestry, Fishing and Hunting (4.27); Government (2.66); and Health Care and Social Assistance (1.36).



Industry	2013 Jobs	2018 Jobs	Change 2013 – 2018	% Change 2013-2018	Change 2018-2023	% Change 2018-2023	2018 LQ	Comp. Effect
Government	3,612	3,676	64	2%	(53)	(1%)	2.66	(6)
Health Care and Social Assistance	1,445	1,576	131	9%	201	13%	1.36	(24)
Retail Trade	989	962	(27)	(3%)	35	4%	1.04	(75)
Accommodation and Food Services	740	859	119	16%	56	7%	1.09	23
Agriculture, Forestry, Fishing and Hunting	448	460	12	3%	(10)	(2%)	4.27	8
Construction	235	295	60	26%	34	12%	0.58	18
Other Services (except Public Administration)	208	251	43	21%	(5)	(2%)	0.58	30
Professional, Scientific, and Technical Services	176	188	12	7%	12	6%	0.32	(10)
Manufacturing	94	148	54	57%	35	24%	0.21	50
Administrative and Support and Waste Management and Remediation Services	115	124	9	8%	11	9%	0.22	(4)
Real Estate and Rental and Leasing	124	120	(4)	(3%)	4	3%	0.78	(17)
Arts, Entertainment, and Recreation	74	96	22	30%	27	28%	0.60	11
Finance and Insurance	101	93	(8)	(8%)	8	9%	0.25	(14)
Educational Services	51	90	39	76%	28	31%	0.38	35
Information	85	78	(7)	(8%)	(1)	(1%)	0.46	(11)
Transportation and Warehousing	90	69	(21)	(23%)	0	0%	0.21	(39)
Utilities	26	24	(2)	(8%)	6	25%	0.75	(3)
Unclassified Industry	12	22	10	83%	9	41%	1.82	6
Wholesale Trade	19	20	1	5%	2	10%	0.06	0
Management of Companies and Enterprises	<10	17	Insf. Data	Insf. Data	4	24%	0.13	7
Mining, Quarrying, and Oil and Gas Extraction	25	0	(25)	(100%)	0	0%	0.00	(21)

## Key Industries

The following table shows the 20 largest 4-digit NAICS industries in terms of employment in Del Norte County in 2018. Between 2013 and 2018, three quarters of the top industries added jobs. Nursing Care Facilities (Skilled Nursing Facilities) added the most jobs with 138, followed by Traveler Accommodation (85 jobs) and General Merchandise Stores, including Warehouse Clubs and Supercenters (72 jobs). Projections into the next five years show that those same industries that experienced a decline in the last five years are expected to continue declining with the addition of Vocational Rehabilitation Services (13 jobs) and Residential Building Construction (3 jobs).

Industry	2018 Jobs	Change 2013-2018	% Change 2013-2018	Projected Change 2018-2023	Projected % Change 2018-2023
State Government, Excluding Education and Hospitals	1,490	(48)	(3%)	(82)	(6%)
Local Government, Excluding Education and Hospitals	1,233	48	4%	12	1%
Education and Hospitals (Local Government)	761	67	10%	23	3%
Restaurants and Other Eating Places	544	23	4%	1	0%
Individual and Family Services	411	47	13%	96	23%
General Medical and Surgical Hospitals	351	(201)	(36%)	(55)	(16%)
Traveler Accommodation	288	85	42%	51	18%
General Merchandise Stores, including Warehouse Clubs and Supercenters	240	72	43%	61	25%
Nursing Care Facilities (Skilled Nursing Facilities)	188	138	276%	79	42%
Building Material and Supplies Dealers	153	13	9%	10	7%
Fishing	148	10	7%	11	7%
Federal Government, Civilian	145	0	0%	(7)	(5%)
Animal Production	140	32	30%	13	9%
Outpatient Care Centers	138	55	66%	72	52%
Crop Production	135	(28)	(17%)	(31)	(23%)
Grocery Stores	127	(55)	(30%)	(45)	(35%)
Vocational Rehabilitation Services	98	2	2%	(13)	(13%)
Residential Building Construction	86	0	0%	(3)	(3%)
Services to Buildings and Dwellings	82	28	52%	15	18%
Gasoline Stations	75	(18)	(19%)	11	15%

# 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

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

- Office and Administrative Support Occupations (1,216 jobs)
- Food Preparation and Serving Related Occupations (772 jobs)
- Sales and Related Occupations (730 jobs)
- Education, Training, and Library Occupations (675 jobs)

The median hourly earnings for all occupations range from \$11.51/hr. for Personal Care and Service Occupations to \$34.91/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 Del Norte County has a strong concentration of workers (above an LQ of 1.25) include

- Farming, Fishing, and Forestry Occupations (5.22)
- Life, Physical, and Social Science Occupations (3.17)
- Community and Social Service Occupations (3.08)
- Protective Service Occupations (2.60)
- Legal Occupations (1.37)
- Personal Care and Service Occupations (1.35)
- Education, Training, and Library Occupations (1.30)

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	1,216	13.3%	\$16.01	0.91
Food Preparation and Serving Related Occupations	772	8.4%	\$11.65	1.01
Sales and Related Occupations	730	8.0%	\$12.97	0.80
Education, Training, and Library Occupations	675	7.4%	\$22.74	1.30
Healthcare Practitioners and Technical Occupations	568	6.2%	\$34.91	1.12
Management Occupations	543	5.9%	\$30.25	1.05
Protective Service Occupations	533	5.8%	\$31.52	2.60
Personal Care and Service Occupations	531	5.8%	\$11.51	1.35
Community and Social Service Occupations	466	5.1%	\$21.42	3.08
Building and Grounds Cleaning and Maintenance Occupations	399	4.4%	\$12.32	1.19
Farming, Fishing, and Forestry Occupations	357	3.9%	\$13.37	5.22
Business and Financial Operations Occupations	349	3.8%	\$25.24	0.74
Installation, Maintenance, and Repair Occupations	336	3.7%	\$16.70	0.94
Construction and Extraction Occupations	323	3.5%	\$17.40	0.77
Transportation and Material Moving Occupations	319	3.5%	\$15.48	0.51
Life, Physical, and Social Science Occupations	239	2.6%	\$24.54	3.17
Healthcare Support Occupations	218	2.4%	\$14.21	0.88
Production Occupations	192	2.1%	\$16.02	0.36
Architecture and Engineering Occupations	110	1.2%	\$31.60	0.70
Legal Occupations	103	1.1%	\$33.89	1.37
Computer and Mathematical Occupations	87	0.9%	\$27.34	0.33
Arts, Design, Entertainment, Sports, and Media Occupations	78	0.8%	\$20.66	0.46
Military-only occupations	25	0.3%	\$19.10	0.45

## 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 \$11.33 for Cashiers to \$40.94 for Registered Nurses. Personal Care Aides experienced the greatest growth in jobs over the last five years, adding 77 jobs, followed by Building Cleaning Workers (48); Elementary and Middle School Teachers (23); and Maintenance and Repair Workers, General (24). All four occupations are projected to grow over the next five years and all but one (Maintenance and Repair Workers, General) are projected to experience the largest growths in that time period.

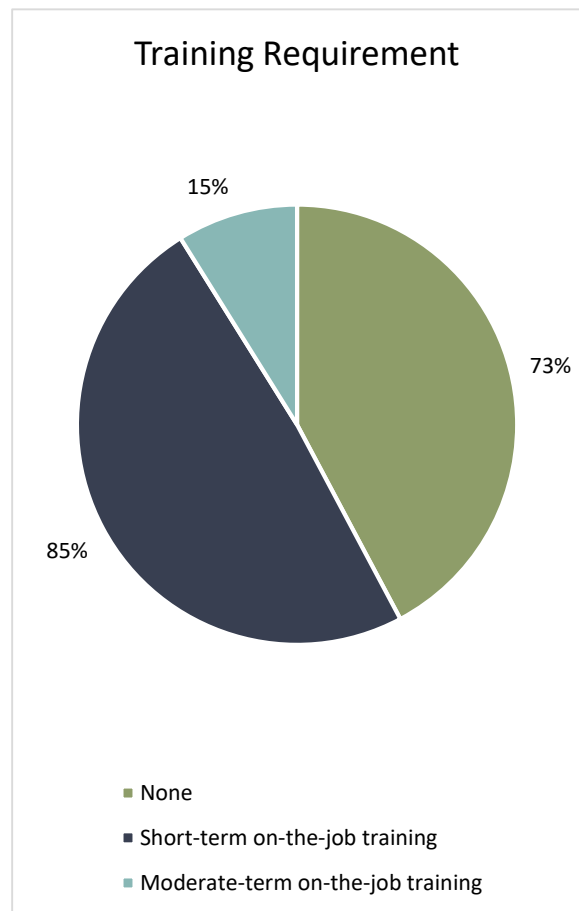
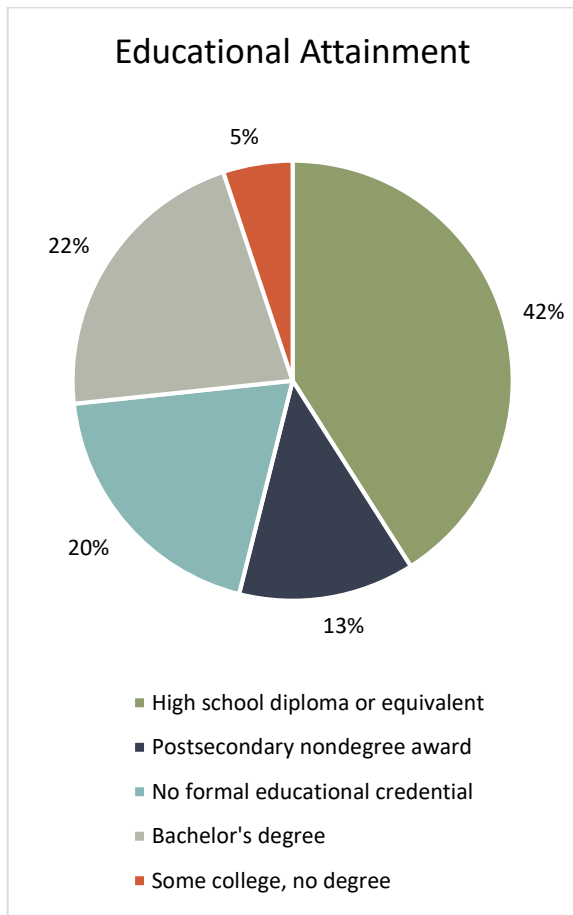
Occupations that experienced declines in employment over the past five years include Registered Nurses (27); Cashiers (12); Retail Salespersons (10); Bailiffs, Correctional Officers, and Jailers (9); Bookkeeping, Accounting, and Auditing Clerks (8); Miscellaneous Agricultural Workers (4); and Secretaries and Administrative Assistants (2). Less than half of those occupations are projected to experience declines in employment over the next five years with Bailiffs, Correctional Officers, and Jailers experiencing the largest decline (20).

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Projected Annual Openings	Median Hourly Earnings
Building Cleaning Workers	274	48	21%	22	8%	44	\$11.81
Cashiers	274	(12)	(4%)	2	1%	55	\$11.33
Secretaries and Administrative Assistants	271	(2)	(1%)	(8)	(3%)	37	\$17.04
Bailiffs, Correctional Officers, and Jailers	240	(9)	(4%)	(20)	(8%)	24	\$37.52
Fast Food and Counter Workers	224	14	7%	13	6%	44	\$11.36
Registered Nurses	221	(27)	(11%)	10	5%	16	\$40.94
Personal Care Aides	216	77	55%	58	27%	40	\$11.35
Retail Salespersons	203	(10)	(5%)	13	6%	34	\$13.31
Elementary and Middle School Teachers	181	23	15%	15	8%	21	\$33.38
Counselors	160	17	12%	4	3%	23	\$20.83
Miscellaneous Community and Social Service Specialists	154	7	5%	6	4%	20	\$19.93
Cooks	151	14	10%	4	3%	26	\$11.73
Miscellaneous Agricultural Workers	151	(4)	(3%)	(9)	(6%)	27	\$11.75
Waiters and Waitresses	136	11	9%	3	2%	28	\$11.71
Social Workers	135	11	9%	5	4%	17	\$23.77
Office Clerks, General	134	10	8%	0	0%	20	\$15.21
Maintenance and Repair Workers, General	131	24	22%	9	7%	17	\$15.00
Teacher Assistants	125	19	18%	7	6%	18	\$14.12
Bookkeeping, Accounting, and Auditing Clerks	118	(8)	(6%)	1	1%	14	\$16.88
Stock Clerks and Order Fillers	109	10	10%	3	3%	16	\$11.84

## Education & Training Requirements for High Demand Jobs

The top high demand jobs in Del Norte County include Personal Care Aides; Nursing Assistants; Maids and Housekeeping Cleaners; Retail Salespersons; and Combined Food Preparation and Serving Workers, Including Fast Food. Of all high demand jobs, 40% require some type of postsecondary educational attainment. An even larger percentage of high demand jobs do not require any type of training requirement (73%).

Average hourly earnings for high demand jobs range from \$11.57/hr. for Combined Food Preparation and Serving Workers, Including Fast Food to \$43.25/hr. for Registered Nurses. Over half of the high demand jobs earn an hourly wage above \$15.00/hr. However, of the top five high demand occupations, only one pays above that threshold – Retail Salespersons (\$15.44/hr.).



Description	2023 Jobs	Change 2018 - 2023	Annual Openings	Avg. Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Personal Care Aides	274	58	46	\$11.64	High school diploma or equivalent	Short-term on-the-job training
Nursing Assistants	93	22	13	\$13.71	Postsecondary nondegree award	None
Maids and Housekeeping Cleaners	171	15	24	\$11.96	No formal educational credential	Short-term on-the-job training
Retail Salespersons	216	13	33	\$15.44	No formal educational credential	Short-term on-the-job training
Combined Food Preparation and Serving Workers, Including Fast Food	213	12	40	\$11.57	No formal educational credential	Short-term on-the-job training
Licensed Practical and Licensed Vocational Nurses	61	12	6	\$21.31	Postsecondary nondegree award	None
Elementary School Teachers, Except Special Education	185	11	15	\$33.55	Bachelor's degree	None
Landscaping and Groundskeeping Workers	103	11	14	\$14.04	No formal educational credential	Short-term on-the-job training
Registered Nurses	231	10	13	\$43.25	Bachelor's degree	None
Home Health Aides	35	10	5	\$13.12	High school diploma or equivalent	Short-term on-the-job training
Maintenance and Repair Workers, General	140	9	15	\$15.61	High school diploma or equivalent	Moderate-term on-the-job training
Secondary School Teachers, Except Special and Career/Technical Education	103	8	8	\$24.51	Bachelor's degree	None
Teacher Assistants	132	7	14	\$14.68	Some college, no degree	None
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	125	7	17	\$13.76	No formal educational credential	Short-term on-the-job training
Medical Assistants	51	7	6	\$15.44	Postsecondary nondegree award	None
General and Operations Managers	102	6	9	\$35.66	Bachelor's degree	None
First-Line Supervisors of Retail Sales Workers	93	6	10	\$17.84	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
Social and Human Service Assistants	90	6	11	\$17.61	High school diploma or equivalent	Short-term on-the-job training
Construction Laborers	62	6	7	\$15.04	No formal educational credential	Short-term on-the-job training
Hotel, Motel, and Resort Desk Clerks	51	6	9	\$12.07	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). Note that six of the top ten occupations are tied to the Health Care and Social Assistance industry.

Connection between Top Occupations and Key Industries	
Top Occupation	Key Industries
Personal Care Aides	<ul style="list-style-type: none"> <li>Health Care and Social Assistance</li> </ul>
Nursing Assistants	<ul style="list-style-type: none"> <li>Health Care and Social Assistance</li> </ul>
Maids and Housekeeping Cleaners	<ul style="list-style-type: none"> <li>Accommodation and Food Services</li> <li>Health Care and Social Assistance</li> <li>Other Services (except Public Administration)</li> </ul>
Retail Salespersons	<ul style="list-style-type: none"> <li>Retail Trade</li> </ul>
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> <li>Accommodation and Food Services</li> <li>Government</li> <li>Retail Trade</li> </ul>
Licensed Practical and Licensed Vocational Nurses	<ul style="list-style-type: none"> <li>Health Care and Social Assistance</li> </ul>
Elementary School Teachers, Except Special Education	<ul style="list-style-type: none"> <li>Government</li> <li>Educational Services</li> </ul>
Landscaping and Groundskeeping Workers	<ul style="list-style-type: none"> <li>Administrative and Support and Waste Management and Remediation Services</li> </ul>
Registered Nurses	<ul style="list-style-type: none"> <li>Health Care and Social Assistance</li> <li>Government</li> </ul>
Home Health Aides	<ul style="list-style-type: none"> <li>Health Care and Social Assistance</li> </ul>



# DETAILED INDUSTRY ANALYSIS

The following section provides an in-depth look at 4-digit NAICS sectors that are important to the Del Norte County economy. These industry sectors include: Agriculture; Health Care; 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 Agriculture Industries

The top agriculture industries in Del Norte County include Fishing (148 jobs); Animal Production (140 jobs); Crop Production (135 jobs); and Logging (27 jobs). The remaining industries in the table do not have sufficient data information to report. Of those top industries, Fishing, which makes up the largest share, has the highest average earnings of \$85,852. Projections into the next five years reveal Animal Production and Fishing to be only positive job growths.

Industry	2018 Jobs	'13-'18 Change	CE '13-'18	'18-'23 Change	CE '18-'23	'18 LQ	Average Earnings
Fishing	148	10	29	11	14	91.65	\$85,852
Animal Production	140	32	31	13	16	5.78	\$40,444
Crop Production	135	(28)	(24)	(31)	(31)	2.95	\$34,534
Logging	27	Insf. Data	19	(3)	(1)	6.83	\$44,356
Support Activities for Animal Production	<10	Insf. Data	(14)	Insf. Data	(1)	0.64	Insf. Data
Support Activities for Forestry	<10	Insf. Data	(1)	Insf. Data	(1)	1.11	Insf. Data
Support Activities for Crop Production	<10	Insf. Data	1	Insf. Data	(0)	0.27	Insf. Data
Hunting and Trapping	0	Insf. Data	(7)	0	0	0.00	\$0
Timber Tract Operations	0	0	0	0	0	0.00	\$0
Forest Nurseries and Gathering of Forest Products	0	0	0	0	0	0.00	\$0

## Staffing Patterns for Agriculture

Diving deeper into the staffing patterns for the Agriculture industry, the top occupations include Miscellaneous Agricultural Workers; Farmers, Ranchers, and Other Agricultural Managers; Fishers and Related Fishing Workers; and Hunters and Trappers. Over the last five years, a significant number of agricultural occupations have experienced declines in employment. Fishers and Related Fishing Workers experienced the greatest decline of 29 jobs but is projected to add 2 over the next five years. Job growth over the next five years is minimal as only two occupations are projected to add jobs: Fishers and Related Fishing Workers and Hunters and Trappers. Median hourly earnings range from \$10.90 for Animal Trainers to \$26.30 for Accountants and Auditors.

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Miscellaneous Agricultural Workers	146	(3)	(2%)	(9)	(6%)	\$11.75
Farmers, Ranchers, and Other Agricultural Managers	84	5	6%	(3)	(4%)	\$17.56
Fishers and Related Fishing Workers	63	(29)	(32%)	2	3%	\$16.37
Hunters and Trappers	42	26	163%	5	12%	\$16.18
Logging Workers	18	12	200%	(2)	(11%)	\$15.58
First-Line Supervisors of Farming, Fishing, and Forestry Workers	11	1	10%	0	0%	\$18.59
Grounds Maintenance Workers	<10	(1)	(33%)	0	0%	\$13.05
Building Cleaning Workers	<10	(1)	(33%)	0	0%	\$11.81
Construction Equipment Operators	<10	1	Insf. Data	0	0%	\$21.48
Accountants and Auditors	<10	(1)	(50%)	0	0%	\$26.30
Customer Service Representatives	<10	(1)	(100%)	0	0%	\$18.79
Animal Trainers	<10	(1)	(33%)	0	0%	\$10.90
Secretaries and Administrative Assistants	<10	0	0%	0	0%	\$17.04
Data Entry and Information Processing Workers	<10	(1)	(100%)	0	0%	\$14.38
Nonfarm Animal Caretakers	<10	(3)	(60%)	0	0%	\$12.87
Driver/Sales Workers and Truck Drivers	<10	1	13%	(1)	(11%)	\$17.23
Miscellaneous Production Workers	<10	1	50%	0	0%	\$12.08
Agricultural and Food Science Technicians	<10	0	0%	0	0%	\$11.71
Heavy Vehicle and Mobile Equipment Service Technicians and Mechanics	<10	0	0%	0	0%	\$20.20
Miscellaneous Installation, Maintenance, and Repair Workers	<10	0	0%	0	0%	\$16.65

## Employment for Top Health Care Industries

The largest employing Health Care sectors in Del Norte County include Individual and Family Services (411 jobs); General Medical and Surgical Hospitals (351 jobs); Nursing Care Facilities (Skilled Nursing Facilities) (188 jobs); and Outpatient Care Centers (138 jobs). The highest LQ amongst industry subsectors was Vocational Rehabilitation Services with a score of 5.09. This subsector has added two jobs over the past five years but is projected to experience a decline of 13 over the next five. General Medical and Surgical Hospitals has an LQ score of 1.33 but has the largest average earnings of all top Health Care subsectors at \$92,311, followed by Other Ambulatory Health Care Services (\$80,263), Outpatient Care Centers (\$80,108), and Office of Physicians (\$51,786). The lowest paid subsector, Individual and Family Services, also has the largest employment in 2018. Del Norte County may have a demand for Individual and Family Services but the low earnings are cause for concern economically.

Industry	2018 Jobs	'13-'18 Change	CE '13-'18	'18-'23 Change	CE '18-'23	'18 LQ	Average Earnings
Individual and Family Services	411	47	(50)	96	4	2.80	\$17,364
General Medical and Surgical Hospitals	351	(201)	(233)	(55)	(71)	1.33	\$92,311
Nursing Care Facilities (Skilled Nursing Facilities)	188	138	139	79	78	2.07	\$39,336
Outpatient Care Centers	138	55	25	72	41	2.54	\$80,108
Vocational Rehabilitation Services	98	2	3	(13)	(11)	5.09	\$26,887
Offices of Other Health Practitioners	69	15	4	17	6	1.16	\$48,002
Child Day Care Services	68	3	1	(6)	(8)	0.97	\$18,464
Offices of Physicians	63	(7)	(11)	(26)	(34)	0.42	\$51,786
Other Ambulatory Health Care Services	49	(17)	(24)	(16)	(23)	2.54	\$80,263
Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	38	Insf. Data	33	15	8	0.72	\$20,993
Other Residential Care Facilities	32	Insf. Data	31	6	7	3.36	\$39,633
Offices of Dentists	26	(3)	(5)	0	(3)	0.47	\$48,154
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	21	21	21	15	13	0.57	\$28,040
Home Health Care Services	20	Insf. Data	17	14	9	0.23	\$24,083
Medical and Diagnostic Laboratories	<10	Insf. Data	(2)	Insf. Data	0	0.33	Insf. Data
Psychiatric and Substance Abuse Hospitals	0	Insf. Data	(0)	0	0	0.00	\$0
Specialty (except Psychiatric and Substance Abuse) Hospitals	0	0	0	0	0	0.00	\$0
Community Food and Housing, and Emergency and Other Relief Services	0	Insf. Data	(2)	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 Aids (202); Registered Nurses (181); Nursing, Psychiatric, and Home Health Aides (87); and Secretaries and Administrative Assistants (77). Registered Nurses was the only occupation of the four that experienced a decline in jobs over the last five years, but it is projected to add 10 more jobs over the next five years. Median hourly wages for Personal Care Aids are among the lowest median wages in this industry sector at \$11.35/hr. whereas top earning wages are most prevalent among Physicians and Surgeons is the highest paid occupation (\$78.93/hr.).

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Personal Care Aides	202	72	55%	61	30%	\$11.35
Registered Nurses	181	(24)	(12%)	10	6%	\$40.94
Nursing, Psychiatric, and Home Health Aides	87	20	30%	32	37%	\$12.72
Secretaries and Administrative Assistants	77	2	3%	3	4%	\$17.04
Miscellaneous Healthcare Support Occupations	75	(1)	(1%)	7	9%	\$15.86
Counselors	59	14	31%	5	8%	\$20.83
Building Cleaning Workers	49	5	11%	7	14%	\$11.81
Miscellaneous Community and Social Service Specialists	47	6	15%	8	17%	\$19.93
Childcare Workers	46	7	18%	(2)	(4%)	\$10.41
Physicians and Surgeons	40	(7)	(15%)	(4)	(10%)	\$78.93
Licensed Practical and Licensed Vocational Nurses	38	17	81%	13	34%	\$22.14
Emergency Medical Technicians and Paramedics	33	(11)	(25%)	(11)	(33%)	\$14.03
Social Workers	32	6	23%	8	25%	\$23.77
Therapists	31	(1)	(3%)	3	10%	\$37.27
Receptionists and Information Clerks	29	5	21%	4	14%	\$13.12
Medical and Health Services Managers	23	1	5%	4	17%	\$47.49
Office Clerks, General	21	1	5%	2	10%	\$15.21
Social and Community Service Managers	21	8	62%	3	14%	\$31.84
Preschool and Kindergarten Teachers	20	0	0%	(1)	(5%)	\$17.17
Health Practitioner Support Technologists and Technicians	19	(2)	(10%)	2	11%	\$20.04

## Employment for Top Tourism Industries

Data for employment within the tourism industry in Del Norte County is very limited. The top industry subsectors include Restaurants and Other Eating Places (544 jobs); Traveler Accommodation (288 jobs); and Other Amusement and Recreation Industries (62 jobs). Most of the average earnings for the tourism subsectors are less than \$30,000. The only industry subsectors that exceed that amount include Scenic and Sightseeing Transportation, Water (\$32,998) and Museums, Historical Sites, and Similar Institutions (\$54,109). The largest subsector, Restaurants and Other Eating Places, has the largest competitive effect with a score of -40 which means Del Norte County experienced less growth in this subsector than expected from non-local trends.

Industry	2018 Jobs	'13-'18 Change	CE '13-18'	'18-'23 Change	CE '18-23	'18 LQ	Average Earnings
Restaurants and Other Eating Places	544	23	(50)	1	(40)	0.90	\$20,383
Traveler Accommodation	288	85	68	51	42	2.63	\$21,559
Other Amusement and Recreation Industries	62	10	0	14	9	0.75	\$18,771
Museums, Historical Sites, and Similar Institutions	24	Insf. Data	16	15	12	2.51	\$54,109
Scenic and Sightseeing Transportation, Water	19	Insf. Data	13	1	(0)	17.84	\$32,998
RV (Recreational Vehicle) Parks and Recreational Camps	17	Insf. Data	10	2	(0)	4.38	\$24,917
Special Food Services	11	Insf. Data	2	1	(0)	0.23	\$23,818
Gambling Industries	<10	Insf. Data	1	Insf. Data	0	0.33	Insf. Data
Independent Artists, Writers, and Performers	<10	Insf. Data	(7)	Insf. Data	(3)	0.37	Insf. Data
Other Support Services	<10	Insf. Data	(2)	Insf. Data	(0)	0.09	Insf. Data

## Staffing Patterns for Tourism<sup>10</sup>

Within the Tourism industry in Del Norte County, the top occupations include Fast Food and Counter Workers (161 jobs); Waiters and Waitresses (129 jobs); Cooks (120 jobs); Building Cleaning Workers (87 jobs); and Hotel, Motel and Resort Desk Clerks (44 jobs). Of all the occupations within this industry in Del Norte County, only one experienced a decline in employment between 2013-2018: Food Preparation Workers (1). Over the next five years, all occupations are projected to grow or remain the same.

Median hourly earnings for Tourism occupations ranged from \$11.36/hr. for Fast Food and Counter Workers to \$15.00 for Maintenance and Repair Workers, General. The earnings range band for this industry are lower than the other two target industry sectors. Del Norte County has experienced positive job growth with occupations from the Tourism industry, but the low wages associated with them can create a negative economic impact for the county.

<sup>10</sup> 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).

Occupation	2018 Employment	Change 2013-2018		Projected Change 2018-2023		Median Hourly Earnings
Fast Food and Counter Workers	161	10	7%	10	6%	\$11.36
Waiters and Waitresses	129	10	8%	1	1%	\$11.71
Cooks	120	10	9%	1	1%	\$11.73
Building Cleaning Workers	87	18	26%	13	15%	\$11.81
Hotel, Motel, and Resort Desk Clerks	44	10	29%	6	14%	\$11.55
Supervisors of Food Preparation and Serving Workers	40	4	11%	2	5%	\$14.27
Dining Room and Cafeteria Attendants and Bartender Helpers	35	7	25%	1	3%	\$11.60
Dishwashers	31	1	3%	1	3%	\$11.71
Bartenders	28	4	17%	1	4%	\$12.02
Food Preparation Workers	26	(1)	(4%)	0	0%	\$12.01
Cashiers	22	6	38%	2	9%	\$11.33
Food Service Managers	20	1	5%	0	0%	\$14.54
Maintenance and Repair Workers, General	18	7	64%	3	17%	\$15.00
Recreation and Fitness Workers	13	1	8%	1	8%	\$12.11
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	12	1	9%	0	0%	\$11.62
First-Line Supervisors of Gaming Workers	11	10	1000%	4	36%	\$22.75
Miscellaneous Entertainment Attendants and Related Workers	10	3	43%	3	30%	\$11.76
Driver/Sales Workers and Truck Drivers	10	2	25%	0	0%	\$17.23
Sailors and Marine Oilers	<10	2	Insf. Data	0	0%	\$14.63
Taxi Drivers and Chauffeurs	<10	0	0%	0	0%	\$12.02

# 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" techniques<sup>11</sup>, *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.

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<sup>11</sup> 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

## Agriculture

NAICS	Description
1110	Crop Production
1151	Support Activities for Crop Production
1120	Animal Production
1152	Support Activities for Animal Production
1153	Support Activities for Forestry
1142	Hunting and Trapping
1133	Logging
1131	Timber Tract Operations
1132	Forest Nurseries and Gathering of Forest Products
1141	Fishing

## 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

## 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