

UPDATE

THE
ECONOMIC
BENEFITS
of HOUSING
IN CALIFORNIA

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Prepared by



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THE ECONOMIC BENEFITS OF HOUSING IN CALIFORNIA

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EXECUTIVE SUMMARY

New housing construction is one of the most visible and widely dispersed industries in California. Taking into account the full range of economic impacts, new housing construction contributes nearly \$40 billion per year to the California economy and supports over 266,000 jobs statewide, based on 2007 new housing unit construction numbers. A little over one half of the economic output (about \$21 billion) is directly the result of new housing construction. The balance (over \$18 billion) is generated by those sectors which supply goods and services to the residential construction industry as well as the consumption activities of the employees of the construction industry and its supplier sectors. Every dollar spent on new housing construction in California generates another \$0.9 in total economic activity, while each job created through residential construction supports and additional 1.0 job.

New housing construction:

- Contributes nearly \$40 billion to the California economy
- Supports over 266,000 jobs per year
- Constitutes over 1 percent of the state's output

New housing construction as a stand alone industry still ranks in the top five in terms of economic output and accounts for over 1 percent of California's total output even with the recent downturn. While new housing construction is clearly a leading economic force in the state, its potential economic contributions are much greater. According to the California Department of Housing and Community Development, the expected population growth and household formation in California demands housing unit production levels around 220,000 per annum. New housing construction has lagged behind the estimated demand since the late 1990s and fell well short during the recent slowdown. An annual production level closer to the statewide need would significantly increase the economic benefits of new housing construction in California.

In all of the state's counties, new housing construction is a sizable economic contributor with total output benefits capturing a notable portion of overall output. Los Angeles, Riverside, San Diego, Orange, and San Bernardino Counties have seen the greatest economic benefits from new housing construction, based on 2007 new housing unit construction data each with total impacts measuring at least \$2 billion in output and 16,000 jobs.

The larger picture of the housing industry's influence in California includes not only the construction of new housing units, but also a wide range of related activities such as remodeling, repair, brokerage, property management, and financing. Accounting for all facets of the housing industry shows that it generates close to \$354 billion of output and supports about 1.2 million jobs throughout the state. Eleven percent of California's total economic output is encompassed within the entire housing industry, ranking it first among the state's leading industries in terms of output. Even with the housing downturn, the industry places ahead of two of the state's most notable sectors, Wholesale & Retail Trade and Professional, Scientific, & Technical Services.

The entire housing industry:

- Generates close to \$354 billion of output
- Supports about 1.2 million jobs
- Accounts for 11 percent of all economic activity in California

The entire housing industry creates a notable contribution to all of the state's counties. The economic benefits of the housing industry are highest in California's largest and most mature counties where the accumulation of housing assets over many years, along with ongoing construction, has resulted in a large inventory with high value. The highest levels of output fall within Los Angeles, Orange, and San Diego Counties where the housing industry measures in the tens of billions of dollars in output and tens to hundreds of thousands of jobs.

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	iii
TABLE OF CONTENTS.....	v
INTRODUCTION.....	1
Research Methodology.....	1
ECONOMIC CONTRIBUTIONS OF CALIFORNIA’S HOUSING INDUSTRY.....	4
New Housing Construction.....	4
<i>Figure 1: Residential Building Permits in California</i>	4
<i>Figure 2: Total Economic Impacts of New Housing Construction in California</i>	5
<i>Figure 3: Detailed Output Impacts of New Housing Construction in California</i>	6
<i>Figure 4: Detailed Employment Impacts of New Housing Construction in California</i>	8
New Housing Construction’s Untapped Potential.....	9
<i>Figure 5: Housing Supply and Demand</i>	9
Entire Housing Industry.....	10
<i>Figure 6: Comparison of California’s Leading Industries</i>	11
COUNTY-LEVEL ECONOMIC CONTRIBUTIONS OF THE HOUSING INDUSTRY.....	12
New Housing Construction.....	12
<i>Figure 7: Residential Building Permits in California’s Counties</i>	13
<i>Figure 8: Total Output Impacts of New Housing Construction in California’s Counties</i>	15
<i>Figure 9: Total Employment Impacts of New Housing Construction in California’s Counties</i>	17
Entire Housing Industry.....	18
<i>Figure 10: County-Level Economic Output and Employment of the Housing Industry</i>	19
APPENDIX A—2007 DETAILED CALIFORNIA SECTOR IMPACTS.....	A-1
APPENDIX B—CALIFORNIA INDUSTRY GROUPINGS.....	B-1
APPENDIX C—POPULATION DISTRIBUTION OF CALIFORNIA’S COUNTIES.....	C-1

INTRODUCTION

The housing industry is one of California's most visible and far-reaching industries. On the most basic level, the state's housing stock provides shelter for its current and future residents and offers a variety of real estate ownership and investment options, while construction of new housing units supports jobs and expands the housing stock. The general public typically recognizes these basic benefits, but the full economic impacts of new housing construction and the housing industry in its entirety are not readily apparent. The complete influence of housing in the California economy includes not only the construction of new single- and multi-family units, but also a wide range of related activities such as remodeling, repair, brokerage, property management, and financing. Despite the recent downturn in the housing market, the industry is still an important sector and contributor to the state's economy.

In order to fully understand and keep track of the economic benefits of California's housing industry, the California Homebuilding Foundation commissioned the Sacramento Regional Research Institute (SRRI) to generate a third update to the 2003 report also titled *The Economic Benefits of Housing* in California. In order to provide a greater local view, this update analyzes all of the state's 58 individual counties rather than examining the separate economic regions that have been the focus of past reports.

This study is designed to provide an economic perspective of the housing industry on California's economy and its counties. The report presents two views of the importance of housing in terms of economic activity and job creation:

1. The full range of economic impacts of new housing construction, including the support industries and consumption expenditures, which are generated through the ripple effect.
2. The greater importance of the entire housing industry, broadly defined, to include residential real estate and financing, maintenance and repair, additions and alterations, construction, homeowner expenditures, property management, and all other aspects of the entire stock of owner- and renter-occupied housing.

This report employs similar methodology as the 2006 update and analyzes the most recent residential construction data for 2006 and 2007 by means of the newest database and structural matrices for the econometric model utilized to calculate economic impacts.

The report is presented in two main sections. The first section examines the economic contributions of California's housing industry including new housing construction and the broader housing industry. This section also touches on the untapped potential of residential construction based on projected demand. The second section analyzes the economic contributions of new housing construction and the entire housing industry within the state's 58 counties. In addition to the two main sections, two appendices are provided—Appendix A presents detailed sector impacts of new housing construction and Appendix B shows sub-sector detail for California's leading industries.

Research Methodology

SRRI calculated the full range of economic impacts in this report using an econometric input-output model called IMPLAN, developed at the University of Minnesota specifically for use in regional analysis and currently distributed and supported by the Minnesota Implan Group. This model is widely used in California for economic and fiscal analysis to quantify the full range of economic impacts. Input-output models, including IMPLAN, evaluate the effects of industries on each other based on the premise that industries use the outputs of other industries as inputs.

INTRODUCTION

Most typical measures of economic activity examine only the total output or employment of an industry or the amount of final consumption demand provided by a given industry. The use of an input-output model provides a much more comprehensive view of the inter-related economic impacts. Specifically, new housing construction directly creates output and employment throughout California's economy; however, the economic benefits do not end with these general construction activities. The ripple effect generates further benefits through the purchase of goods and services in addition to employee consumption activities.

The full range of economic impacts produced by new housing construction includes direct, indirect, and induced benefits.

- **Direct Benefits** consist of economic activity related exclusively to new housing construction. This includes all expenditures made by homebuilders and all employees who work directly for those companies in the state. These are often the most visible and recognizable activities of new housing construction.
- **Indirect Benefits** define the creation of additional economic activity that results from linked businesses, suppliers of goods and services, and provision of operating inputs. Examples of indirect activity include wholesale trade where builders purchase lumber, roofing, electrical, and plumbing materials; motor freight services that deliver materials to the wholesaler and construction sites; and engineering and architectural services which participate in the design and planning of housing units and subdivisions.
- **Induced Benefits** measure the consumption expenditures of direct and indirect sector employees. Examples of induced benefits include employees' expenditures on items such as retail purchases, housing, medical services, banking, and insurance.

These benefits also illustrate the multiplier effect that quantifies the incremental indirect and induced impact of each additional direct job or dollar of output related to new housing construction within the state.

In this analysis, the total direct, indirect, and induced benefits are presented in two ways:

- **Employment** demonstrates the number of jobs generated and is calculated in a full-time equivalent employment value on an annual basis.
- **Output** accounts for total revenues including all sources of income or the value of production generated by an industry for a given time period. This is the best overall measure of business and economic activity because it is the measure most firms use to determine current activity levels.

For the county-level analysis, each county's individual economic attributes (productivity, structure, output, etc.) are captured in the modeling with limited comparisons and linkages to other counties. As such, housing's economic activities and related relationships stop at each county's border. Depending on the related attributes, larger areas like a metropolitan statistical area or state capture other interrelated economic activity. This occurrence contributes to discrepancies between the sum of all 58 counties' economic impacts and the total statewide impacts.

For this update, SRRI used IMPLAN's 2006 model data and structural matrices, the latest coefficients available to describe economic activities and interrelationships among sectors in the economy. The previous update utilized 2003 model parameters to calibrate the model and analyze the economic impacts. While the methodology in the two updates is similar, the impact analyses are based on two different snapshots of the economy, containing different levels of economic activity, industry structure, and sector relationships. General

INTRODUCTION

comparisons between this report and the 2006 update are applicable, making allowances for the model differences.

In order to create an accounting of the entire housing industry, SRRI allocated employment and output data for specific sub-sectors into broad categories based on detailed economic activities encompassed in each sub-sector as well as reviews of construction, brokerage, and labor market data at the statewide level. One particular area of interest in this analysis was the Real Estate sector, which captures both residential and non-residential activity. In order to disaggregate this sector and allocate the residential portion to the housing industry, SRRI reviewed detailed employment data, major real estate brokerage activities, and residential and commercial valuation measures. This review showed that, on average, between 55 and 75 percent of the Real Estate sector is focused on residential property transactions, management, and leasing while the remaining 25 to 45 percent is related to commercial property. Accounting for the midpoint in the range and a similar level as previous reports, at the statewide level, SRRI allocated 65 percent of the Real Estate sector's employment and output to the entire housing industry and the remaining 35 percent to the non-residential category. Employment and output data for all sub-sectors were pulled from the IMPLAN model, which utilizes economic data from sources such as the United States Bureau of Economic Analysis, Bureau of Labor Statistics, and Census Bureau to provide a comprehensive data set for the national, statewide, and local economies.

By taking into account the multiplier effect, direct, indirect, and induced benefits, and other housing-related activities, this study provides a measurement of the full range of economic impacts and offers insight into how the housing sector, beginning with new housing construction, produces a wide range of economic benefits to the California economy.

CALIFORNIA'S HOUSING INDUSTRY

ECONOMIC CONTRIBUTIONS OF CALIFORNIA'S HOUSING INDUSTRY

The housing industry, one of California's largest and important industries, is comprised of activities related to new home construction, remodeling, repair, brokerage, property management, and financing. A detailed look at the impacts of new housing construction and a discussion on the untapped potential of residential construction will be provided within this section, followed by an examination of the broader housing industry's economic contributions to California.

New Housing Construction

According to the United States Census Bureau residential building permit data, as shown in Figure 1, authorization was provided for about 161,000 and 110,000 new privately-owned housing units throughout California in 2006 and 2007, respectively. Single-family units accounted for approximately 67 percent of the permits granted in 2006 and around 62 percent of the permits in 2007. The remaining 33 and 38 percent were for multi-family housing. Construction costs for these new housing units amounted to around \$30 million in 2006 and \$21 million in 2007. This equates to an average construction valuation per unit of nearly \$185,000 in 2006 and around \$194,000 in 2007. The slowdown in the housing industry is evident in the decrease in permits seen since the previous update of this report—estimates for 2005, around the most recent peak, showed that over 200,000 permits were issued and construction costs were valued at approximately \$37 million. The 2006 level was close to the long-term annual average while the 2007 measure is notably below.

FIGURE 1
RESIDENTIAL BUILDING PERMITS IN CALIFORNIA
(VALUATION IN THOUSANDS)

<i>Indicator</i>	<i>2006</i>	<i>2007</i>
Permits	160,502	110,073
Valuation	\$29,614,392	\$21,335,308

Sacramento Regional Research Institute, August 2008
Data Source: United States Census Bureau

The benefits of new housing construction to the state's economy do not end with those activities directly related to building housing units. New housing construction produces a ripple effect in California's economy as a result of the linkages that occur between construction activities, suppliers of goods and services, and consumer spending.

As shown in Figure 2 (on the following page), overall, based on 2007 values, the economic benefits of new housing construction equate to almost \$40 billion in total industry output and over 266,000 jobs on an annual basis in the state through direct, indirect, and induced activity. These total economic impacts are a result of the following three effects: 1) new housing construction directly provides about \$21 billion of output and 131,000 jobs, 2) housing construction indirectly supports around \$9 billion in industry output and 63,000 employees through its demand on suppliers of goods and services, and 3) consumption activities of those employed directly and indirectly through new home construction generates an induced impact of approximately \$10 billion of output and 73,000 jobs.

CALIFORNIA'S HOUSING INDUSTRY

FIGURE 2
TOTAL ECONOMIC IMPACTS OF NEW HOUSING
CONSTRUCTION IN CALIFORNIA
(OUTPUT IN THOUSANDS)

<i>Year/Impact</i>	<i>Direct</i>	<i>Indirect</i>	<i>Induced</i>	<i>Total</i>
2007 Employment	130,556	63,084	72,588	266,228
2007 Output	\$21,335,308	\$8,537,544	\$9,845,384	\$39,718,236
2006 Employment	179,294	88,717	100,348	368,359
2006 Output	\$29,614,392	\$11,992,084	\$13,610,057	\$55,216,532

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Note: Differences due to rounding.

The multiplier effect of new housing construction shows that, on average, for each additional dollar of construction valuation, the state will see another \$0.9 in industry output and for every employee created directly as a result of constructing new housing units, California will gain another 1.0 job through indirect and induced activity. The economic multiplier effect was similar in 2006, but the economic impacts were greater due to the higher level of construction valuation, demonstrating a total impact of over \$55 billion of economic output and 368,000 jobs.

With the decline in permit levels since the last update to this report, total economic impacts of new housing construction have decreased substantially. Total impacts in 2005 were estimated at close to 487,000 jobs and \$68 billion in output—the 2007 values are over 40 percent lower than the 2005 contributions, clearly demonstrating the effects of the housing slump on new construction.

However, with a total output impact of around \$40 billion in 2007, economic activities associated with the construction of new privately-owned housing units constitutes over 1 percent of the state's total economic output and, despite the decline, still ranks among the top five sectors in the state in terms of output.

Figure 3 (on the next page) shows that in addition to housing construction sectors, California's Wholesale Trade; Architectural & Engineering Services; and Real Estate sectors benefit the most from the total output impacts created through new housing construction (based on the 2007 economic impact values). The largest indirect output gains are generated in the Architectural & Engineering Services; Wholesale Trade; and Wood Kitchen Cabinet & Countertop Manufacturing sectors as a result of their role as linked and service-providing sectors. In addition to the owner-occupied dwelling activities (capturing the expenses of homeownership), the Wholesale Trade; Offices of Physicians, Dentists, & Other Health Practitioners; and Food Services & Drinking Places sectors see the greatest induced impacts due to the direct and indirect employees' spending within these sectors. Appendix A provides additional details on the output impacts of new housing construction on the full range of sectors within California's economy.

CALIFORNIA'S HOUSING INDUSTRY

FIGURE 3
DETAILED OUTPUT IMPACTS OF NEW HOUSING
CONSTRUCTION IN CALIFORNIA (IN THOUSANDS)

<i>Sector</i>	<i>Direct</i>	<i>Indirect</i>	<i>Induced</i>	<i>Total</i>
New residential 1-unit structures	\$15,896,152	-	-	\$15,896,152
New multifamily housing structures	\$5,439,156	-	-	\$5,439,156
Wholesale trade	-	\$823,697	\$564,900	\$1,388,597
Owner-occupied dwellings	-	-	\$1,148,661	\$1,148,661
Architectural and engineering services	-	\$842,101	\$36,144	\$878,244
Real estate	-	\$275,643	\$431,435	\$707,078
Petroleum refineries	-	\$310,551	\$254,436	\$564,987
Offices of physicians, dentists, and other health practitioners	-	-	\$483,305	\$483,305
Food services and drinking places	-	-	\$431,571	\$473,153
Motor vehicle and parts dealers	-	\$268,815	\$202,925	\$471,740
Hospitals	-	-	\$430,959	\$430,959
Monetary authorities and depository credit interme	-	\$142,332	\$241,807	\$384,139
Food and beverage stores	-	\$208,166	\$155,861	\$364,027
Truck transportation	-	\$268,170	\$79,200	\$347,370
Insurance carriers	-	\$90,440	\$248,370	\$338,810
General merchandise stores	-	\$185,682	\$139,168	\$324,850
Wood kitchen cabinet and countertop manufacturing	-	\$317,764	\$3,821	\$321,585
Legal services	-	\$166,684	\$134,093	\$300,777
Telecommunications	-	\$146,445	\$137,510	\$283,955
Building material and garden supply stores	-	\$168,873	\$107,303	\$276,175
Management of companies and enterprises	-	\$147,816	\$117,394	\$265,209
Nonstore retailers	-	\$153,452	\$99,074	\$252,527
Securities, commodity contracts, investments	-	\$104,162	\$140,716	\$244,878
Clothing and clothing accessories stores	-	\$123,088	\$99,239	\$222,327
Nondepository credit intermediation and related activities	-	\$105,436	\$103,317	\$208,752
Health and personal care stores	-	\$113,493	\$70,013	\$183,506
Gasoline stations	-	\$102,686	\$66,273	\$168,958
Accounting and bookkeeping services	-	\$113,313	\$53,758	\$167,071
Employment services	-	\$121,993	\$44,842	\$166,835
Other State and local government enterprises	-	\$45,850	\$116,629	\$162,478
Sawmills	-	\$149,959	\$2,987	\$152,946
Other ambulatory health care services	-	\$253	\$149,153	\$149,406
Management consulting services	-	\$98,405	\$50,266	\$148,671
Pharmaceutical and medicine manufacturing	-	\$143	\$148,190	\$148,333
Plastics plumbing fixtures and all other plastics	-	\$128,560	\$14,950	\$143,510
Furniture and home furnishings stores	-	\$87,918	\$54,736	\$142,654
Power generation and supply	-	\$43,399	\$93,209	\$136,608
Services to buildings and dwellings	-	\$82,010	\$48,450	\$130,460
Engineered wood member and truss manufacturing	-	\$126,946	\$1,270	\$128,217
Hotels and motels, including casino hotels	-	\$46,409	\$76,143	\$122,553
State and local government electric utilities	-	\$39,178	\$83,225	\$122,402
Office administrative services	-	\$84,362	\$30,701	\$115,064
Miscellaneous store retailers	-	\$65,520	\$49,124	\$114,644
Other millwork, including flooring	-	\$102,993	\$1,639	\$104,632
Automotive repair and maintenance, except car wash	-	\$22,569	\$78,880	\$101,449
Nursing and residential care facilities	-	-	\$99,586	\$99,586
Advertising and related services	-	\$52,796	\$44,188	\$96,984
Cable networks and program distribution	-	\$14,911	\$80,467	\$95,378
Natural gas distribution	-	\$25,834	\$69,446	\$95,281
All other miscellaneous professional and technical services	-	\$54,113	\$33,698	\$87,812

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Notes: Figure only includes the 50 sectors with the largest total impacts based on the 2007 impact values.

Differences due to rounding.

CALIFORNIA'S HOUSING INDUSTRY

As Figure 4 (on the next page) demonstrates, the Food Services & Drinking Places; Wholesale Trade; and Architectural & Engineering Services are the non-housing-related sectors that capture the largest employment gains in the state resulting from new housing construction (using the 2007 economic impact values). The Architectural & Engineering Services; Wholesale Trade; and Employment Services sectors experience the largest indirect gains because of their linkages to new housing construction activities. Additionally, the Food Services & Drinking Places; Offices of Physicians, Dentists, & Other Health Practitioners; and Hospital sectors see the greatest induced benefits, demonstrating the demand for goods and services from these sectors that are generated by spending activity from the direct and indirect employees. Additional sector-level details for new housing construction's employment impacts are provided in Appendix A.

CALIFORNIA'S HOUSING INDUSTRY

FIGURE 4
DETAILED EMPLOYMENT IMPACTS OF NEW
HOUSING CONSTRUCTION IN CALIFORNIA

Sector	Direct	Indirect	Induced	Total
New residential 1-unit structures	91,663	-	-	91,663
New multifamily housing structures	38,894	-	-	38,894
Food services and drinking places	-	750	7,786	8,536
Wholesale trade	-	4,401	3,018	7,418
Architectural and engineering services	-	6,369	273	6,642
General merchandise stores	-	3,042	2,280	5,322
Employment services	-	3,794	1,395	5,189
Food and beverage stores	-	2,750	2,059	4,808
Offices of physicians, dentists, and other health practitioners	-	-	4,265	4,265
Motor vehicle and parts dealers	-	2,164	1,634	3,797
Real estate	-	1,405	2,200	3,605
Nonstore retailers	-	2,119	1,368	3,486
Hospitals	-	-	3,149	3,149
Building material and garden supply stores	-	1,691	1,075	2,766
Clothing and clothing accessories stores	-	1,513	1,220	2,733
Miscellaneous store retailers	-	1,527	1,145	2,672
Truck transportation	-	2,036	601	2,638
Health and personal care stores	-	1,437	887	2,324
Private households	-	-	2,249	2,249
Services to buildings and dwellings	-	1,401	827	2,228
Wood kitchen cabinet and countertop manufacturing	-	2,187	26	2,213
Social assistance, except child day care services	-	-	2,196	2,196
Legal services	-	1,096	882	1,978
Nursing and residential care facilities	-	-	1,917	1,917
Civic, social, professional and similar organizations	-	805	894	1,699
Accounting and bookkeeping services	-	1,101	522	1,623
Securities, commodity contracts, investments	-	655	885	1,541
Sporting goods, hobby, book and music stores	-	888	626	1,515
Furniture and home furnishings stores	-	837	521	1,358
Management of companies and enterprises	-	721	573	1,294
Hotels and motels, including casino hotels	-	489	803	1,292
Monetary authorities and depository credit intermediation	-	476	808	1,283
Colleges, universities, and junior colleges	-	57	1,187	1,243
Insurance carriers	-	320	877	1,197
Automotive repair and maintenance, except car wash	-	245	855	1,100
Management consulting services	-	701	358	1,058
Gasoline stations	-	640	413	1,053
Child day care services	-	-	1,038	1,038
Nondepository credit intermediation and related activities	-	517	507	1,024
Other ambulatory health care services	-	2	943	945
Elementary and secondary schools	-	-	894	894
Electronics and appliance stores	-	577	314	891
Investigation and security services	-	611	276	887
Other amusement, gambling, and recreation industries	-	26	860	886
Personal care services	-	-	843	843
Couriers and messengers	-	560	249	809
Postal service	-	394	408	802
Engineered wood member and truss manufacturing	-	719	7	726
Plastics plumbing fixtures and all other plastics	-	630	73	704
Other educational services	-	24	675	699

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Notes: Figure only includes the 50 sectors with the largest total impacts based on the 2007 impact values.

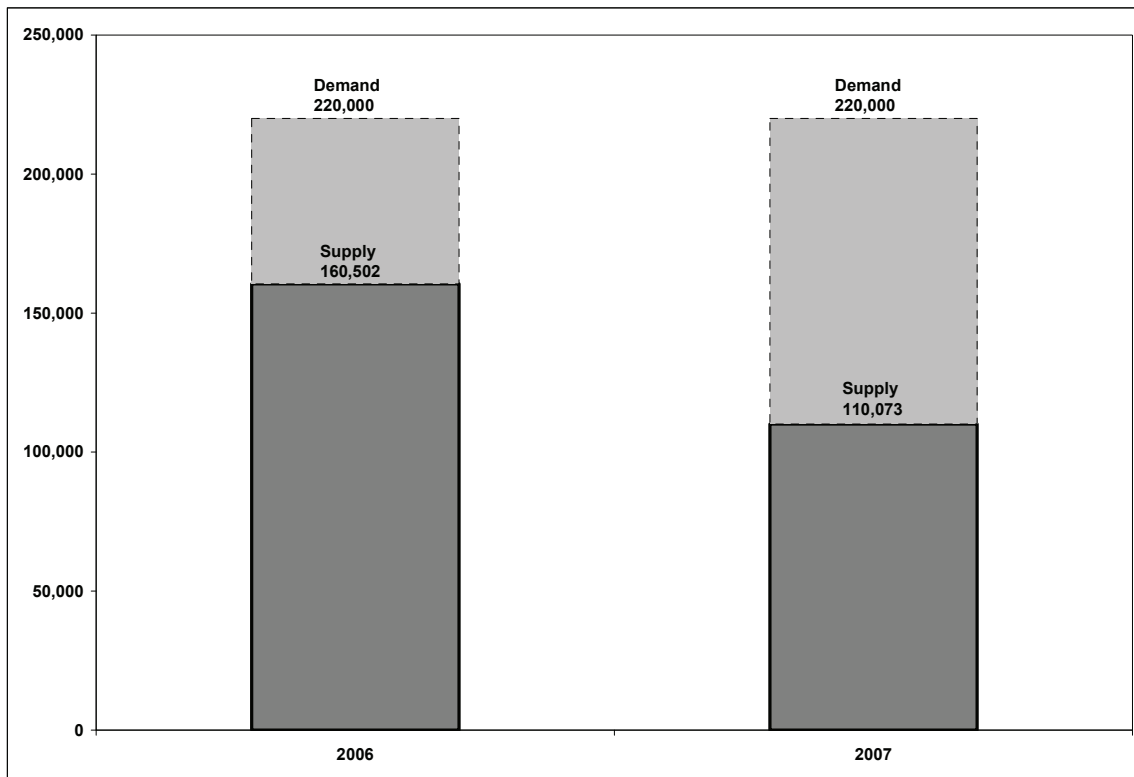
Differences due to rounding.

CALIFORNIA'S HOUSING INDUSTRY

New Housing Construction's Untapped Potential

As housing production has declined, the gap between supply and projected demand has expanded in 2006 and 2007. Based on California Department of Housing and Community Development analysis¹, California's housing stock would have to expand by 220,000 units every year between 1997 and 2020 to meet the needs of the expected population growth and household formation in the state. The Department's assessment shows that new home construction has been lagging behind the projected demand since the late 1990s. Even with the relatively high production levels seen in 2004 and 2005, the supply of housing did not reach the projected demand. As shown in Figure 5, supply fell short of demand by over 59,000 units in 2006 and nearly 110,000 units (or half) in 2007.

FIGURE 5
HOUSING SUPPLY AND DEMAND



Sacramento Regional Research Institute, August 2008

Data Sources: United States Census Bureau and California Department of Housing and Community Development

While the downturn has taken the state further off pace, an annual production level closer to the projected demand would significantly increase the economic benefits of new housing construction in California. If the residential permit level in 2007 met the 220,000 housing need, the state would see an incremental increase in the total output impact of another additional \$40 billion and an additional employment impact of nearly 266,000 jobs. This reflects the difference in economic impact created by the actual 2007 construction of approximately 110,000 units and projected demand. Similarly, if housing construction in 2006 approached 220,000 units

CALIFORNIA'S HOUSING INDUSTRY

rather than the nearly 161,000 units actually permitted, California would see an additional economic benefit of over \$20 billion of output and 137,000 jobs including direct, indirect, and induced impacts.

Entire Housing Industry

The housing industry's influence in California includes a wide range of activities such as remodeling, repair, brokerage, property management, and financing, in addition to the construction of new housing units. As described within the Research Methodology section of this report, 65 percent of the Real Estate sector's employment and output is allocated to the housing industry grouping to account for residential real estate activities.

Figure 6 (on the following page) shows that, overall, the housing industry generates nearly \$354 billion in output and supports over 1.2 million jobs throughout the state. This is a modest increase over the previous estimate even with the housing market slowdown. There are a few reasons for this increase in the contributions of the entire housing industry, including general escalations in output values and costs over time (across the activities encompassed in the housing industry and other sectors); increases in the housing stock and associated ownership (leading to a greater aggregate of homeownership costs and linked expenditures); and the delay in the data fully catching up to the housing slump (for example, maintenance and remodeling are down, but the market corrections to the recent surge in real estate activities are not as transparent).

A comparison of the economic contributions of the housing industry with other leading sectors in the state demonstrates the importance of housing in California's economy. With 11 percent of total state output, housing is California's leading industry, followed by Wholesale & Retail Trade (\$319 billion output) and Professional, Scientific, & Technical Services (\$244 billion output). Additional sector-level details for California's leading industry groupings are provided in Appendix B.

CALIFORNIA'S HOUSING INDUSTRY

FIGURE 6
COMPARISON OF CALIFORNIA'S LEADING INDUSTRIES
(OUTPUT IN THOUSANDS)

<i>Leading Industry Sectors</i>	<i>Output</i>	<i>Employment</i>	<i>% of Total Output</i>
Housing*	\$353,882,945	1,206,363	11.0%
Wholesale and Retail Trade	\$319,371,519	2,898,187	10.0%
Professional, Scientific, and Technical Services	\$243,976,178	1,765,828	7.6%
Computer and Electronic Product Manufacturing	\$237,547,527	304,098	7.4%
Finance and Insurance	\$211,287,880	938,878	6.6%
Information	\$204,504,386	554,814	6.4%
State and Local Government	\$182,578,990	2,121,902	5.7%
Health Care and Social Assistance	\$160,739,148	1,701,940	5.0%
Non-Residential Real Estate Activities*	\$155,209,201	1,057,344	4.8%
Agriculture and Food Processing	\$131,237,540	686,718	4.1%
Management and Support	\$130,100,028	1,569,240	4.1%
Leisure and Hospitality	\$121,983,652	1,900,889	3.8%
Transportation and Warehousing	\$79,324,312	679,733	2.5%
Other Services	\$75,002,406	1,211,561	2.3%
Medical Manufacturing	\$65,235,446	111,785	2.0%
Transportation Equipment Manufacturing	\$56,720,781	130,142	1.8%
Utilities	\$53,034,144	59,788	1.7%
Federal Government	\$36,532,731	354,332	1.1%
California Total	\$3,202,734,560	20,620,104	-

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 coefficients

* Housing industry includes an allocation of 65 percent of the Real Estate sector; Non-Residential Real Estate Activities includes 35 percent of the Real Estate sector.

COUNTY-LEVEL HOUSING INDUSTRY

COUNTY-LEVEL ECONOMIC CONTRIBUTIONS OF THE HOUSING INDUSTRY

Each of California's 58 counties is characterized by unique economic trends and development patterns. The counties range from very small, such as Alpine and Modoc Counties with respective populations of approximately 1,200 to 3,400 people, to very large, in particular, Los Angeles with around 10 million residents and San Diego and Orange Counties, each with populations of around 3 million people. Some counties are within areas that have recently been experiencing significant growth, namely, the Inland Empire (Riverside and San Bernardino Counties), the Bay Area (San Francisco and Santa Clara Counties), as well as some of the counties surrounding the state's capital of Sacramento (Placer, Sacramento, and Yolo Counties). Appendix C includes a map of California and its counties shaded by population size.

This section will cover the impacts of new housing construction within all of California's counties in addition to each county's entire housing industry output and employment.

New Housing Construction

As shown in Figure 7 (on the next page), in both 2006 and 2007, the largest number of residential permits and highest construction valuations (based on data from the United States Census Bureau) were in the southern portion of the state within Los Angeles, Riverside, San Bernardino, San Diego, and Orange Counties. Combined, these five counties comprised around 50 percent of the total construction valuation and total residential permits granted statewide in 2006 and in 2007.

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 7
RESIDENTIAL BUILDING PERMITS IN CALIFORNIA'S COUNTIES
(VALUATION IN THOUSANDS)

County	Permits		Valuation (in thousands)	
	2006	2007	2006	2007
Alameda	6,276	3,138	\$1,169,180	\$724,659
Alpine	31	35	\$15,685	\$17,650
Amador	235	159	\$38,011	\$29,170
Butte	1,282	985	\$170,299	\$130,063
Calaveras	497	277	\$148,700	\$71,726
Colusa	99	105	\$27,108	\$16,691
Contra Costa	4,222	3,700	\$1,112,544	\$916,086
Del Norte	37	76	\$7,365	\$14,899
El Dorado	1,005	604	\$305,630	\$215,802
Fresno	5,278	4,855	\$792,193	\$725,928
Glenn	171	116	\$28,836	\$21,496
Humboldt	489	397	\$45,356	\$37,248
Imperial	2,203	969	\$331,042	\$120,180
Inyo	13	25	\$2,740	\$3,689
Kern	6,991	4,202	\$918,475	\$525,297
Kings	849	497	\$125,277	\$77,098
Lake	568	405	\$99,589	\$64,220
Lassen	132	59	\$24,410	\$11,794
Los Angeles	25,202	19,244	\$4,178,727	\$3,788,534
Madera	1,376	509	\$226,810	\$93,626
Marin	582	430	\$157,526	\$132,319
Mariposa	139	102	\$34,474	\$23,626
Mendocino	292	232	\$43,293	\$34,857
Merced	2,216	794	\$386,428	\$138,508
Modoc	22	18	\$3,843	\$2,046
Mono	150	84	\$54,272	\$27,707
Monterey	865	1,107	\$266,494	\$270,457
Napa	507	330	\$115,586	\$125,301
Nevada	637	449	\$129,582	\$103,129
Orange	8,303	7,372	\$1,787,275	\$1,386,098
Placer	3,178	2,412	\$696,699	\$607,343
Plumas	216	154	\$34,247	\$26,528
Riverside	24,765	12,334	\$4,744,256	\$2,411,025
Sacramento	6,430	4,112	\$920,827	\$760,009
San Benito	30	32	\$7,162	\$11,758
San Bernardino	13,324	7,752	\$2,427,087	\$1,323,200
San Diego	9,191	7,435	\$1,780,966	\$1,430,828
San Francisco	2,398	2,475	\$239,780	\$304,388
San Joaquin	3,652	2,426	\$822,210	\$525,714
San Luis Obispo	1,764	1,266	\$314,754	\$212,960
San Mateo	1,005	817	\$328,133	\$352,558
Santa Barbara	873	711	\$217,359	\$181,698
Santa Clara	6,120	4,162	\$1,230,873	\$997,999
Santa Cruz	711	842	\$132,597	\$174,595
Shasta	952	712	\$156,903	\$111,889
Sierra	17	14	\$5,824	\$4,574
Siskiyou	203	148	\$38,260	\$28,904
Solano	1,205	1,019	\$251,988	\$226,056
Sonoma	1,912	1,431	\$403,506	\$291,961
Stanislaus	2,644	1,865	\$440,787	\$306,406
Sutter	356	269	\$67,173	\$59,698
Tehama	525	247	\$68,928	\$37,063
Trinity	64	49	\$11,509	\$9,438
Tulare	3,575	2,689	\$589,962	\$447,231
Tuolumne	222	149	\$49,401	\$47,274
Ventura	2,244	1,595	\$525,310	\$330,610
Yolo	1,264	922	\$197,012	\$153,751
Yuba	993	759	\$164,126	\$109,946

Sacramento Regional Research Institute, August 2008
Data Source: United States Census Bureau

COUNTY-LEVEL HOUSING INDUSTRY

Like at the statewide level, the local benefits of new housing construction extend well beyond the economic activities directly related to building new single- and multi-family housing units. Throughout each county, the multiplier effect generates additional output and jobs within linked suppliers of goods and services and sectors that support employees' consumption activities within the county boundaries. As a result, housing construction provides considerable economic benefits to virtually every county in the state, even those counties which do not have significant levels of economic activities in manufacturing, financial services, or other high value sectors.

Figures 8 and 9 (on pages 15 through 18) demonstrate that the largest economic impacts occur within the counties with the highest levels of residential permits and construction valuation—Los Angeles, Riverside, San Diego, Orange, and San Bernardino Counties. Based on 2007 values and including direct, indirect and induced impacts, Los Angeles County sees annual economic benefits of around \$7 billion of output and 47,000 jobs; Riverside County experiences impacts of nearly \$4 billion of industry output and 29,000 employees; and Orange and San Bernardino Counties each realize over \$2 billion of output and around 16,000 jobs. New housing construction is important even in the state's smallest economic areas like Modoc, Inyo, and Sierra Counties, where residential building activities generate a total of between nearly \$3 and \$5 million of output and around 20 to 40 jobs annually based on 2007 values.

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 8
TOTAL OUTPUT IMPACTS OF NEW HOUSING
CONSTRUCTION IN CALIFORNIA'S COUNTIES
(IN THOUSANDS)

County	2006				2007			
	Direct	Indirect	Induced	Total	Direct	Indirect	Induced	Total
Alameda	\$1,169,180	\$337,496	\$443,119	\$1,949,796	\$724,659	\$215,370	\$271,920	\$1,211,949
Alpine	\$15,685	\$713	\$945	\$17,343	\$17,650	\$655	\$1,171	\$19,475
Amador	\$38,011	\$8,023	\$7,597	\$53,632	\$29,170	\$6,205	\$5,785	\$41,160
Butte	\$170,299	\$54,697	\$52,026	\$277,022	\$130,063	\$40,993	\$40,161	\$211,218
Calaveras	\$148,700	\$30,792	\$23,081	\$202,573	\$71,726	\$14,776	\$11,201	\$97,703
Colusa	\$27,108	\$3,887	\$3,056	\$34,051	\$16,691	\$2,005	\$2,025	\$20,720
Contra Costa	\$1,112,544	\$321,126	\$347,780	\$1,781,450	\$916,086	\$264,236	\$286,476	\$1,466,798
Del Norte	\$7,365	\$1,443	\$1,180	\$9,988	\$14,899	\$2,920	\$2,386	\$20,205
El Dorado	\$305,630	\$81,158	\$73,601	\$460,390	\$215,802	\$57,508	\$51,866	\$325,176
Fresno	\$792,193	\$279,517	\$270,016	\$1,341,726	\$725,928	\$255,063	\$247,839	\$1,228,830
Glenn	\$28,836	\$5,687	\$4,393	\$38,916	\$21,496	\$4,259	\$3,270	\$29,025
Humboldt	\$45,356	\$12,369	\$12,778	\$70,503	\$37,248	\$10,490	\$10,332	\$58,070
Imperial	\$331,042	\$81,444	\$61,515	\$474,000	\$120,180	\$28,593	\$22,885	\$171,657
Inyo	\$2,740	\$498	\$457	\$3,695	\$3,689	\$644	\$627	\$4,960
Kern	\$918,475	\$295,156	\$260,413	\$1,474,043	\$525,297	\$167,681	\$149,544	\$842,522
Kings	\$125,277	\$23,328	\$21,893	\$170,498	\$77,098	\$14,480	\$13,418	\$104,995
Lake	\$99,589	\$20,650	\$18,314	\$138,553	\$64,220	\$13,299	\$11,817	\$89,336
Lassen	\$24,410	\$4,664	\$4,141	\$33,214	\$11,794	\$2,253	\$2,001	\$16,048
Los Angeles	\$4,178,727	\$1,511,914	\$1,828,662	\$7,519,303	\$3,788,534	\$1,353,461	\$1,664,748	\$6,806,743
Madera	\$226,810	\$54,152	\$42,954	\$323,916	\$93,626	\$22,429	\$17,702	\$133,758
Marin	\$157,526	\$42,665	\$44,503	\$244,695	\$132,319	\$35,840	\$37,381	\$205,540
Mariposa	\$34,474	\$5,702	\$4,185	\$44,360	\$23,626	\$3,900	\$2,873	\$30,399
Mendocino	\$43,293	\$12,263	\$10,730	\$66,286	\$34,857	\$9,904	\$8,623	\$53,385
Merced	\$386,428	\$81,935	\$79,527	\$547,890	\$138,508	\$29,406	\$28,485	\$196,399
Modoc	\$3,843	\$536	\$401	\$4,780	\$2,046	\$285	\$214	\$2,545
Mono	\$54,272	\$8,499	\$6,885	\$69,656	\$27,707	\$4,360	\$3,491	\$35,557
Monterey	\$266,494	\$81,007	\$71,872	\$419,373	\$270,457	\$77,550	\$74,796	\$422,803
Napa	\$115,586	\$25,579	\$30,670	\$171,834	\$125,301	\$28,246	\$32,656	\$186,203
Nevada	\$129,582	\$30,913	\$32,734	\$193,230	\$103,129	\$24,995	\$25,738	\$153,862
Orange	\$1,787,275	\$590,196	\$710,669	\$3,088,140	\$1,386,098	\$448,916	\$554,735	\$2,389,749
Placer	\$696,699	\$209,106	\$197,732	\$1,103,537	\$607,343	\$183,064	\$172,016	\$962,422
Plumas	\$34,247	\$7,160	\$4,977	\$46,384	\$26,528	\$5,546	\$3,855	\$35,930
Riverside	\$4,744,257	\$1,599,019	\$1,449,034	\$7,792,309	\$2,411,025	\$808,224	\$738,347	\$3,957,596
Sacramento	\$920,827	\$317,997	\$298,215	\$1,537,039	\$760,009	\$267,554	\$244,519	\$1,272,082
San Benito	\$7,162	\$1,808	\$1,098	\$10,069	\$11,758	\$2,969	\$1,803	\$16,530
San Bernardino	\$2,427,087	\$938,979	\$870,221	\$4,236,287	\$1,323,200	\$504,757	\$477,503	\$2,305,459
San Diego	\$1,780,966	\$599,723	\$675,691	\$3,056,380	\$1,430,828	\$475,732	\$545,533	\$2,452,093
San Francisco	\$239,780	\$50,391	\$58,710	\$348,881	\$304,388	\$63,421	\$74,779	\$442,587
San Joaquin	\$822,210	\$279,187	\$266,735	\$1,368,132	\$525,714	\$176,887	\$171,045	\$873,647
San Luis Obispo	\$314,754	\$98,244	\$98,420	\$511,418	\$212,960	\$66,018	\$66,858	\$345,837
San Mateo	\$328,133	\$85,974	\$97,825	\$511,932	\$352,558	\$99,039	\$102,876	\$554,473
Santa Barbara	\$217,359	\$68,579	\$66,855	\$352,793	\$181,698	\$56,247	\$56,362	\$294,307
Santa Clara	\$1,230,873	\$256,350	\$279,627	\$1,766,850	\$997,999	\$212,044	\$225,277	\$1,435,320
Santa Cruz	\$132,597	\$36,971	\$38,179	\$207,747	\$174,595	\$43,001	\$53,011	\$270,608
Shasta	\$156,903	\$52,635	\$50,778	\$260,317	\$111,889	\$37,992	\$36,016	\$185,897
Sierra	\$5,824	\$438	\$485	\$6,746	\$4,574	\$344	\$381	\$5,299
Siskiyou	\$38,260	\$9,004	\$7,625	\$54,889	\$28,904	\$6,827	\$5,748	\$41,478
Solano	\$251,988	\$73,556	\$70,461	\$396,004	\$226,056	\$66,295	\$63,009	\$355,360
Sonoma	\$403,506	\$134,317	\$142,628	\$680,451	\$291,961	\$94,858	\$104,147	\$490,965
Stanislaus	\$440,787	\$136,626	\$128,080	\$705,493	\$306,406	\$92,765	\$90,158	\$489,329

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 8—CONTINUED
 TOTAL OUTPUT IMPACTS OF NEW HOUSING
 CONSTRUCTION IN CALIFORNIA'S COUNTIES
 (IN THOUSANDS)

County	2006				2007			
	Direct	Indirect	Induced	Total	Direct	Indirect	Induced	Total
Sutter	\$67,173	\$19,345	\$17,240	\$103,759	\$59,698	\$17,233	\$15,305	\$92,237
Tehama	\$68,928	\$16,570	\$12,887	\$98,385	\$37,063	\$9,355	\$6,752	\$53,170
Trinity	\$11,509	\$1,925	\$1,245	\$14,680	\$9,438	\$1,579	\$1,021	\$12,038
Tulare	\$589,962	\$158,848	\$136,567	\$885,378	\$447,231	\$120,988	\$103,300	\$671,519
Tuolumne	\$49,401	\$12,739	\$11,015	\$73,155	\$47,274	\$12,142	\$10,559	\$69,975
Ventura	\$525,310	\$159,355	\$152,233	\$836,898	\$330,610	\$97,473	\$96,974	\$525,056
Yolo	\$197,012	\$52,612	\$46,022	\$295,645	\$153,751	\$42,001	\$35,495	\$231,247
Yuba	\$164,126	\$43,915	\$25,841	\$233,881	\$109,946	\$29,002	\$17,444	\$156,392

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Note: Differences due to rounding.

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 9
TOTAL EMPLOYMENT IMPACTS OF NEW HOUSING
CONSTRUCTION IN CALIFORNIA'S COUNTIES

County	Direct	Indirect	Induced	Total	Direct	Indirect	Induced	Total
	2006				2007			
Alameda	7,004	2,619	3,262	12,886	4,249	1,671	2,002	7,921
Alpine	100	9	8	117	125	9	10	143
Amador	235	81	71	387	179	63	54	295
Butte	1,057	525	515	2,097	824	393	398	1,614
Calaveras	939	317	221	1,478	457	152	108	716
Colusa	167	46	36	249	114	24	24	162
Contra Costa	6,073	2,498	2,654	11,224	5,004	2,055	2,186	9,245
Del Norte	49	15	12	77	99	31	25	155
El Dorado	1,762	760	696	3,218	1,240	538	490	2,269
Fresno	5,080	2,632	2,525	10,238	4,673	2,402	2,318	9,393
Glenn	175	59	48	282	130	44	36	210
Humboldt	303	126	133	562	242	107	108	457
Imperial	2,122	898	622	3,642	803	316	231	1,350
Inyo	18	6	5	28	24	8	6	39
Kern	5,703	2,583	2,344	10,631	3,287	1,467	1,346	6,101
Kings	806	254	217	1,276	492	157	133	783
Lake	660	208	172	1,038	426	134	111	670
Lassen	152	54	44	250	73	26	21	121
Los Angeles	26,731	11,201	13,685	51,617	24,477	10,014	12,458	46,949
Madera	1,417	563	418	2,398	583	233	172	989
Marin	895	336	337	1,568	751	282	283	1,317
Mariposa	218	72	48	339	150	50	33	232
Mendocino	265	118	106	488	213	95	85	393
Merced	2,482	891	800	4,172	888	320	286	1,495
Modoc	26	6	4	36	14	3	2	19
Mono	330	95	65	490	167	49	33	249
Monterey	1,595	703	618	2,916	1,702	676	644	3,022
Napa	700	241	249	1,189	738	266	265	1,269
Nevada	805	318	313	1,436	629	257	246	1,132
Orange	10,836	4,442	5,241	20,520	8,528	3,375	4,091	15,995
Placer	4,114	1,939	1,744	7,798	3,572	1,698	1,517	6,788
Plumas	219	71	48	338	170	55	37	261
Riverside	29,608	14,453	12,534	56,595	15,130	7,308	6,387	28,825
Sacramento	5,604	2,686	2,469	10,758	4,552	2,258	2,024	8,834
San Benito	46	17	10	72	76	27	16	119
San Bernardino	14,723	7,958	7,423	30,104	8,150	4,274	4,073	16,498
San Diego	11,012	4,962	5,417	21,390	8,944	3,933	4,373	17,251
San Francisco	1,447	344	402	2,193	1,847	433	512	2,792
San Joaquin	4,894	2,539	2,397	9,829	3,151	1,609	1,537	6,298
San Luis Obispo	1,956	932	892	3,780	1,333	626	606	2,565
San Mateo	1,862	653	698	3,213	1,909	751	734	3,394
Santa Barbara	1,332	592	571	2,494	1,132	486	481	2,099
Santa Clara	7,279	1,948	2,009	11,236	5,832	1,614	1,618	9,065
Santa Cruz	791	328	333	1,452	1,149	381	462	1,992
Shasta	990	507	509	2,006	698	366	361	1,426
Sierra	34	5	5	44	27	4	4	35
Siskiyou	243	97	80	419	183	73	60	316
Solano	1,536	682	615	2,832	1,370	615	550	2,535
Sonoma	2,406	1,152	1,222	4,780	1,776	815	893	3,483
Stanislaus	2,789	1,362	1,211	5,363	1,988	926	853	3,767

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 9—CONTINUED
TOTAL EMPLOYMENT IMPACTS OF NEW HOUSING
CONSTRUCTION IN CALIFORNIA'S COUNTIES

County	Direct	Indirect	Induced	Total	Direct	Indirect	Induced	Total
	2006				2007			
Sutter	401	192	167	761	356	171	149	676
Tehama	468	166	132	767	241	93	69	403
Trinity	80	21	14	114	65	17	12	94
Tulare	3,749	1,588	1,299	6,636	2,831	1,209	982	5,022
Tuolumne	310	121	108	539	298	115	103	516
Ventura	3,326	1,403	1,279	6,007	2,147	859	815	3,820
Yolo	1,140	447	390	1,976	871	357	301	1,528
Yuba	968	379	247	1,594	657	250	167	1,074

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Note: Differences due to rounding.

New housing construction is a sizable contributor to the state's 58 counties with the total output impacts in most capturing a proportion of the total output around or above the statewide level. Total output benefits measuring in the billions for 10 counties and job creation in the tens of thousands for five of California's counties.

In general, the industry sectors in each of California's counties experience a similar distribution of benefits of new home construction as the statewide average due to inter-industry linkages. In addition to homebuilding-related sectors, the Wholesale Trade; Architectural & Engineering Services; and Real Estate sectors benefit the most from the total output impacts created through new housing construction while the Food Services & Drinking Places; Architectural & Engineering Services; and Wholesale Trade sectors capture the largest employment gains.

Entire Housing Industry

The broader housing industry is a considerable factor in the county economies. The industry measures in the tens of billions of dollars of output and at least tens of thousands of total jobs in six of California's counties. Even the smaller counties see at least \$6 million of output from the housing industry. Figure 10 (on pages 19 and 20) displays the housing industry's output and employment within these economies. Similar to the statewide totals, these figures represent activities of the broader definition of the housing industry which also includes residential real estate sales, financing, brokerage, repairs, and the maintenance and operation of existing housing units, in addition to new home construction. The totals within this table, however, do not include the residential activities from the Real Estate sector, due to complexity in estimating this at a county level. Naturally, should these activities be included, each county's housing industry output and employment figures would be higher. This also explains why California's total housing output within this section of the study is approximately 55 percent less than the state's housing total in Figure 6. Therefore, housing industry output could potentially be about 55 percent higher for each county represented in Figure 10 if the residential activities from the Real Estate sector would be included.

As can be expected, the economic benefits of the housing industry are highest in California's largest and most mature areas of Los Angeles, Orange, and San Diego Counties, with respective outputs of about \$51, \$25, and \$21 billion (a combined total of about 43 percent of the state's output). Other areas with relatively large housing industry output totals include Santa Clara, Riverside, and Alameda Counties, all contributing between \$10 and \$13 billion in output.

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 10
COUNTY-LEVEL ECONOMIC OUTPUT AND
EMPLOYMENT OF THE HOUSING INDUSTRY
(OUTPUT IN THOUSANDS)

<i>County</i>	<i>Output</i>	<i>Employment</i>
California	\$229,110,499	570,226
Alameda	\$10,610,420	24,626
Alpine	\$6,316	19
Amador	\$202,749	547
Butte	\$1,104,727	3,081
Calaveras	\$297,545	1,058
Colusa	\$67,926	101
Contra Costa	\$8,225,015	19,301
Del Norte	\$90,002	171
El Dorado	\$1,483,463	4,390
Fresno	\$4,470,840	13,259
Glenn	\$104,189	214
Humboldt	\$648,190	1,758
Imperial	\$531,755	1,090
Inyo	\$85,761	198
Kern	\$3,943,311	11,689
Kings	\$452,035	822
Lake	\$290,596	674
Lassen	\$111,072	243
Los Angeles	\$51,114,716	100,416
Madera	\$628,254	1,858
Marin	\$2,616,742	5,322
Mariposa	\$87,941	241
Mendocino	\$467,836	1,278
Merced	\$955,392	2,563
Modoc	\$44,463	113
Mono	\$107,330	389
Monterey	\$2,258,035	5,019
Napa	\$1,137,524	3,392
Nevada	\$831,871	2,790
Orange	\$25,431,500	71,405
Placer	\$3,008,165	10,120
Plumas	\$152,331	536
Riverside	\$12,803,301	45,194
Sacramento	\$8,818,665	24,698
San Benito	\$329,856	1,058
San Bernardino	\$9,716,835	27,345
San Diego	\$21,142,687	54,925
San Francisco	\$6,605,431	10,887
San Joaquin	\$3,450,767	10,153
San Luis Obispo	\$1,883,600	5,988
San Mateo	\$5,956,245	11,586
Santa Barbara	\$2,646,456	6,661
Santa Clara	\$13,095,550	26,010
Santa Cruz	\$1,883,890	4,874
Shasta	\$1,123,121	3,554
Sierra	\$14,581	37
Siskiyou	\$210,050	509
Solano	\$2,547,102	7,069

COUNTY-LEVEL HOUSING INDUSTRY

FIGURE 10—CONTINUED
COUNTY-LEVEL ECONOMIC OUTPUT AND
EMPLOYMENT OF THE HOUSING INDUSTRY
(OUTPUT IN THOUSANDS)

<i>County</i>	<i>Output</i>	<i>Employment</i>
Sonoma	\$3,584,457	10,190
Stanislaus	\$2,526,688	7,501
Sutter	\$468,182	1,218
Tehama	\$219,882	521
Trinity	\$46,402	93
Tulare	\$1,871,385	5,233
Tuolumne	\$308,757	916
Ventura	\$4,940,860	11,827
Yolo	\$1,088,531	2,867
Yuba	\$259,210	623

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information

Note: The real estate sector is not included in this data.

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

2007 IMPACTS OF NEW HOUSING CONSTRUCTION IN CALIFORNIA

Sector Name	Output Impacts (in thousands)			Employment Impacts				
	Direct Impact	Indirect Impact	Induced Impact	Direct Impact	Indirect Impact	Induced Impact	Total	
California Total	\$21,335,308	\$8,537,544	\$9,845,384	\$39,718,236	130,556	63,084	72,588	266,228
New residential 1-unit structures	\$15,896,152	-	-	\$15,896,152	91,663	-	-	91,663
New multifamily housing structures	\$5,439,156	-	-	\$5,439,156	38,894	-	-	38,894
Wholesale trade	-	\$823,697	\$564,900	\$1,388,597	-	4,401	3,018	7,418
Owner-occupied dwellings	-	-	\$1,148,661	\$1,148,661	-	-	-	-
Architectural and engineering services	-	\$842,101	\$36,144	\$878,244	-	6,369	273	6,642
Real estate	-	\$275,643	\$431,435	\$707,078	-	1,405	2,200	3,605
Petroleum refineries	-	\$310,551	\$254,436	\$564,987	-	37	30	66
Offices of physicians, dentists, and other health practitioners	-	-	\$483,305	\$483,305	-	-	4,265	4,265
Food services and drinking places	-	\$41,582	\$431,571	\$473,153	-	750	7,786	8,536
Motor vehicle and parts dealers	-	\$268,815	\$202,925	\$471,740	-	2,164	1,634	3,797
Hospitals	-	-	\$430,959	\$430,959	-	-	3,149	3,149
Monetary authorities and depository credit intermediation	-	\$142,332	\$241,807	\$384,139	-	476	808	1,283
Food and beverage stores	-	\$208,166	\$155,861	\$364,027	-	2,750	2,059	4,808
Truck transportation	-	\$268,170	\$79,200	\$347,370	-	2,036	601	2,638
Insurance carriers	-	\$90,440	\$248,370	\$338,810	-	320	877	1,197
General merchandise stores	-	\$185,682	\$139,168	\$324,850	-	3,042	2,280	5,322
Wood kitchen cabinet and countertop manufacturing	-	\$317,764	\$3,821	\$321,585	-	2,187	26	2,213
Legal services	-	\$166,684	\$134,093	\$300,777	-	1,096	882	1,978
Building material and garden supply stores	-	\$146,445	\$137,510	\$283,955	-	332	312	644
Management of companies and enterprises	-	\$168,873	\$107,303	\$276,175	-	1,691	1,075	2,766
Nonstore retailers	-	\$147,816	\$117,394	\$265,209	-	721	573	1,294
Securities, commodity contracts, investments	-	\$153,452	\$99,074	\$252,527	-	2,119	1,368	3,486
Clothing and clothing accessories stores	-	\$104,162	\$140,716	\$244,878	-	655	885	1,541
Nondepository credit intermediation and related activities	-	\$123,088	\$99,239	\$222,327	-	1,513	1,220	2,733
Health and personal care stores	-	\$105,436	\$103,317	\$208,752	-	517	507	1,024
Gasoline stations	-	\$113,493	\$70,013	\$183,506	-	1,437	887	2,324
Accounting and bookkeeping services	-	\$102,686	\$66,273	\$168,958	-	640	413	1,053
Employment services	-	\$113,313	\$53,758	\$167,071	-	1,101	522	1,623
Other State and local government enterprises	-	\$121,993	\$44,842	\$166,835	-	3,794	1,395	5,189
Sawmills	-	\$45,850	\$116,629	\$162,478	-	170	433	603
Other ambulatory health care services	-	\$149,959	\$2,987	\$152,946	-	508	10	518
Management consulting services	-	\$253	\$149,153	\$149,406	-	2	943	945
Pharmaceutical and medicine manufacturing	-	\$98,405	\$50,266	\$148,671	-	701	358	1,058
Plastics plumbing fixtures and all other plastics	-	\$143	\$148,190	\$148,333	-	-	153	153
Furniture and home furnishings stores	-	\$128,560	\$14,950	\$143,510	-	630	73	704
Power generation and supply	-	\$87,918	\$54,736	\$142,654	-	837	521	1,358
	-	\$43,399	\$93,209	\$136,608	-	48	103	151

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
	Impact	Impact	Impact	Impact	Impact	Impact
Services to buildings and dwellings	-	\$82,010	\$48,450	-	1,401	827
Engineered wood member and truss manufacturing	-	\$126,946	\$128,217	-	719	7
Hotels and motels, including casino hotels	-	\$46,409	\$76,143	-	489	803
State and local government electric utilities	-	\$83,225	\$122,402	-	76	162
Office administrative services	-	\$84,362	\$30,701	-	414	151
Miscellaneous store retailers	-	\$65,520	\$49,124	-	1,527	1,145
Other millwork, including flooring	-	\$102,993	\$1,639	-	612	10
Automotive repair and maintenance, except car wash	-	\$22,569	\$78,880	-	245	855
Nursing and residential care facilities	-	\$99,586	\$99,586	-	-	1,917
Advertising and related services	-	\$52,796	\$44,188	-	372	312
Cable networks and program distribution	-	\$14,911	\$80,467	-	13	69
Natural gas distribution	-	\$25,834	\$69,446	-	27	71
All other miscellaneous professional and technical services	-	\$54,113	\$33,698	-	95	59
Cut and sew apparel manufacturing	-	\$534	\$87,032	-	4	600
Wood windows and door manufacturing	-	\$85,549	\$1,929	-	461	10
Colleges, universities, and junior colleges	-	\$3,751	\$78,621	-	57	1,187
Machinery and equipment rental and leasing	-	\$69,561	\$11,484	-	210	35
Plastics pipe, fittings, and profile shapes	-	\$76,358	\$4,542	-	207	12
Sporting goods, hobby, book and music stores	-	\$47,126	\$33,233	-	888	626
Electronic computer manufacturing	-	\$4,911	\$75,242	-	2	29
Civic, social, professional and similar organizations	-	\$37,638	\$41,769	-	805	894
Insurance agencies, brokerages, and related	-	\$20,979	\$58,325	-	129	360
Maintenance and repair of nonresidential buildings	-	\$42,322	\$36,913	-	296	258
Electronics and appliance stores	-	\$51,217	\$27,853	-	577	314
Social assistance, except child day care services	-	\$6	\$76,459	-	-	2,196
Environmental and other technical consulting services	-	\$64,535	\$10,473	-	409	66
Other amusement, gambling, and recreation industries	-	\$2,157	\$72,091	-	26	860
Funds, trusts, and other financial vehicles	-	\$626	\$71,826	-	2	222
Other personal services	-	\$3,103	\$58,587	-	17	315
Specialized design services	-	\$50,462	\$9,292	-	332	61
Oil and gas extraction	-	\$30,589	\$28,865	-	52	49
Semiconductors and related device manufacturing	-	\$28,540	\$30,657	-	32	35
Couriers and messengers	-	\$40,757	\$18,124	-	560	249
Postal service	-	\$27,373	\$28,400	-	394	408
Motion picture and video industries	-	\$12,110	\$40,296	-	51	170
Rail transportation	-	\$39,133	\$11,796	-	141	42
Religious organizations	-	-	\$50,361	-	-	367
Logging	-	\$48,964	\$985	-	186	4
Lessors of nonfinancial intangible assets	-	\$22,661	\$27,226	-	4	5
Business support services	-	\$27,482	\$21,311	-	360	279
Scenic and sightseeing transportation and support	-	\$29,363	\$18,603	-	232	147
Commercial machinery repair and maintenance	-	\$38,950	\$8,871	-	266	61
Custom architectural woodwork and millwork	-	\$47,481	\$54	-	334	-
Air transportation	-	\$16,578	\$29,818	-	68	123

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Child day care services	-	\$44,703	\$44,703	-	-	1,038
Waste management and remediation services	-	\$14,647	\$14,647	-	160	80
Personal care services	-	\$43,021	\$43,021	-	-	843
Asphalt paving mixture and block manufacturing	-	\$42,575	\$42,575	-	66	1
Scientific research and development services	-	\$15,432	\$26,152	-	109	184
Other educational services	-	\$1,413	\$39,623	-	24	675
Other communications equipment manufacturing	-	\$40,240	\$689	-	108	2
Cut stone and stone product manufacturing	-	\$40,606	\$282	-	353	3
Foam product manufacturing	-	\$31,103	\$9,325	-	120	36
Elementary and secondary schools	-	\$40,152	\$40,152	-	-	894
Audio and video equipment manufacturing	-	\$564	\$38,921	-	1	49
Radio and television broadcasting	-	\$19,404	\$19,320	-	87	86
Reconstituted wood product manufacturing	-	\$37,473	\$278	-	103	1
Home health care services	-	\$37,513	\$37,513	-	-	581
Computer systems design services	-	\$22,813	\$14,482	-	232	147
Other support services	-	\$20,192	\$16,583	-	160	132
Investigation and security services	-	\$24,791	\$11,204	-	611	276
Automotive equipment rental and leasing	-	\$10,799	\$24,946	-	63	144
Adhesive manufacturing	-	\$28,425	\$2,072	-	54	4
Warehousing and storage	-	\$16,391	\$13,918	-	213	181
Toilet preparation manufacturing	-	\$396	\$29,391	-	1	44
Veterinary services	-	\$646	\$28,589	-	9	398
Cattle ranching and farming	-	\$654	\$26,308	-	4	175
Grainmaking and giving and social advocacy organizations	-	-	\$26,839	-	-	563
Switchgear and switchboard apparatus manufacturing	-	\$26,403	\$226	-	99	1
Bread and bakery product, except frozen, manufacturing	-	\$739	\$25,860	-	5	169
Information services	-	\$15,575	\$10,699	-	32	22
Spectator sports	-	\$7,595	\$18,327	-	132	318
Household goods repair and maintenance	-	\$11,612	\$13,659	-	55	65
Newspaper publishers	-	\$11,298	\$13,823	-	86	105
Fluid milk manufacturing	-	\$453	\$24,529	-	1	38
Private households	-	-	\$23,952	-	-	2,249
Polish and other sanitation good manufacturing	-	\$5,136	\$18,355	-	4	15
Other computer related services, including facilities management	-	\$16,013	\$7,430	-	74	34
Asphalt shingle and coating materials manufacturing	-	\$21,584	\$1,646	-	35	3
Cheese manufacturing	-	\$683	\$21,486	-	1	28
Other commercial and service industry machinery manufacturing	-	\$21,742	\$168	-	80	1
Automobile and light truck manufacturing	-	\$73	\$20,973	-	-	15
Drycleaning and laundry services	-	\$2,289	\$18,559	-	49	397
Meat processed from carcasses	-	\$447	\$19,509	-	1	42
Travel arrangement and reservation services	-	\$4,530	\$14,874	-	34	110
Water transportation	-	\$8,092	\$11,261	-	14	19
Wood preservation	-	\$19,023	\$207	-	70	1
Commercial printing	-	\$9,469	\$9,722	-	102	105

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts				
	Direct Impact	Indirect Impact	Induced Impact	Direct Impact	Indirect Impact	Induced Impact		
	Total	Total	Total	Total	Total	Total		
Fitness and recreational sports centers	-	\$2,739	\$16,139	\$18,878	-	74	437	511
Soap and other detergent manufacturing	-	\$2,490	\$15,964	\$18,454	-	3	16	19
Periodical publishers	-	\$6,942	\$11,145	\$18,087	-	26	43	69
Data processing services	-	\$10,514	\$6,913	\$17,427	-	41	27	67
Cut stock, resawing lumber, and planing	-	\$16,180	\$439	\$16,619	-	111	3	114
Veneer and plywood manufacturing	-	\$15,901	\$241	\$16,142	-	89	1	90
Soft drink and ice manufacturing	-	\$305	\$15,738	\$16,044	-	1	23	24
State and local government passenger transit	-	\$3,215	\$12,808	\$16,024	-	43	171	214
Transit and ground passenger transportation	-	\$3,177	\$12,654	\$15,830	-	57	227	283
All other crop farming	-	\$12,974	\$2,726	\$15,701	-	59	12	71
Poultry processing	-	\$255	\$14,645	\$14,901	-	1	63	64
Glass and glass products, except glass containers	-	\$11,020	\$3,784	\$14,804	-	46	16	61
Promoters of performing arts and sports and agents for public figures	-	\$3,492	\$14,329	\$17,821	-	57	177	233
Plastics packaging materials, film and sheet	-	\$7,789	\$6,493	\$14,283	-	23	19	43
Software publishers	-	\$313	\$13,885	\$14,198	-	1	29	29
Other maintenance and repair construction	-	\$4,753	\$9,225	\$13,978	-	56	108	163
Pipeline transportation	-	\$5,673	\$8,201	\$13,874	-	4	6	11
Animal, except poultry, slaughtering	-	\$220	\$13,508	\$13,728	-	1	34	35
Independent artists, writers, and performers	-	\$5,616	\$8,020	\$13,637	-	42	60	103
Other snack food manufacturing	-	\$338	\$12,748	\$13,087	-	1	21	22
General and consumer goods rental except video tapes and discs	-	\$6,303	\$6,150	\$12,453	-	103	100	203
Sound recording industries	-	\$1,060	\$11,170	\$12,229	-	2	19	20
Ceramic wall and floor tile manufacturing	-	\$12,063	\$159	\$12,222	-	68	1	68
Car washes	-	\$1,708	\$10,092	\$11,800	-	32	191	223
Performing arts companies	-	\$1,340	\$9,796	\$11,136	-	39	287	326
Metal window and door manufacturing	-	\$10,702	\$206	\$10,908	-	60	1	61
All other electronic component manufacturing	-	\$5,961	\$4,680	\$10,641	-	26	21	47
All other food manufacturing	-	\$51	\$10,142	\$10,194	-	38	38	76
Death care services	-	-	\$9,995	\$9,995	-	-	129	129
Database, directory, and other publishers	-	\$3,788	\$6,205	\$9,993	-	11	18	29
Electronic equipment repair and maintenance	-	\$6,669	\$3,313	\$9,982	-	43	22	65
Surgical appliance and supplies manufacturing	-	\$107	\$9,809	\$9,916	-	-	30	30
Fabricated pipe and pipe fitting manufacturing	-	\$9,669	\$134	\$9,803	-	46	1	47
Metal valve manufacturing	-	\$9,396	\$184	\$9,580	-	32	1	33
Doll, toy, and game manufacturing	-	\$16	\$9,292	\$9,308	-	-	22	22
Other apparel knitting mills	-	\$58	\$9,205	\$9,263	-	-	47	48
Maintenance and repair of farm and nonfarm residential structures	-	\$1,020	\$8,208	\$9,228	-	6	52	58
Fiber optic cable manufacturing	-	\$8,284	\$767	\$9,051	-	13	1	14
Photographic services	-	\$1,249	\$7,723	\$8,972	-	16	98	113
Automatic environmental control manufacturing	-	\$8,346	\$333	\$8,679	-	38	2	39
Nonupholstered wood household furniture manufacturing	-	\$1,082	\$7,474	\$8,556	-	8	55	62
Vegetable and melon farming	-	\$40	\$8,481	\$8,521	-	-	44	44
Video tape and disc rental	-	\$61	\$8,317	\$8,378	-	1	135	136
Museums, historical sites, zoos, and parks	-	-	\$8,145	\$8,145	-	-	80	80

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)				Employment Impacts			
	Direct Impact		Indirect Impact		Direct Impact		Indirect Impact	
	Impact	Total	Impact	Total	Impact	Total	Impact	Total
Upholstered household furniture manufacturing	-	\$14	\$7,976	\$7,990	-	-	-	63
Water, sewage, and other systems	-	\$2,082	\$5,865	\$7,947	-	10	27	37
Surgical and medical instrument manufacturing	-	\$26	\$7,715	\$7,741	-	-	-	22
Other miscellaneous chemical product manufacturing	-	\$4,785	\$2,905	\$7,689	-	10	6	17
Machine shops	-	\$6,243	\$1,402	\$7,644	-	45	10	55
Greenhouse and nursery production	-	\$2,685	\$4,948	\$7,632	-	20	38	58
Ice cream and frozen dessert manufacturing	-	\$405	\$7,210	\$7,615	-	1	14	15
Curtain and linen mills	-	\$86	\$7,470	\$7,557	-	-	37	37
Other accommodations	-	\$93	\$7,425	\$7,519	-	1	71	72
Agriculture and forestry support activities	-	\$4,035	\$3,191	\$7,226	-	124	98	221
Miscellaneous wood product manufacturing	-	\$6,258	\$6,911	\$6,911	-	41	4	45
Confectionery manufacturing from purchased chocolate	-	\$31	\$6,750	\$6,781	-	-	-	18
Book publishers	-	\$546	\$5,952	\$6,498	-	2	19	21
Petroleum lubricating oil and grease manufacturing	-	\$3,600	\$2,762	\$6,363	-	4	3	7
Motor vehicle parts manufacturing	-	\$3,836	\$2,435	\$6,271	-	11	7	18
Sheet metal work manufacturing	-	\$6,109	\$151	\$6,260	-	30	1	31
Cookie and cracker manufacturing	-	\$49	\$6,192	\$6,241	-	-	-	16
Wood container and pallet manufacturing	-	\$4,096	\$2,009	\$6,105	-	35	17	52
Mattress manufacturing	-	-	\$6,064	\$6,064	-	-	-	22
Custom compounding of purchased resins	-	\$4,898	\$1,027	\$5,926	-	11	2	14
Plastics bottle manufacturing	-	\$1,311	\$4,515	\$5,826	-	4	14	18
Fruit and vegetable canning and drying	-	\$86	\$5,689	\$5,775	-	-	-	13
Breweries	-	\$95	\$5,435	\$5,530	-	-	-	6
Other Federal Government enterprises	-	\$2,218	\$3,287	\$5,505	-	93	138	232
Computer storage device manufacturing	-	\$1,863	\$3,359	\$5,223	-	2	4	7
Custom computer programming services	-	\$3,222	\$1,984	\$5,206	-	30	18	48
Spice and extract manufacturing	-	\$72	\$4,995	\$5,067	-	-	-	10
Dry, condensed, and evaporated dairy products	-	\$100	\$4,899	\$4,999	-	-	-	6
Ophthalmic goods manufacturing	-	\$163	\$4,778	\$4,941	-	1	19	20
Electroplating, anodizing, and coloring metal	-	\$4,340	\$546	\$4,886	-	26	3	29
Confectionery manufacturing from cacao beans	-	\$37	\$4,808	\$4,845	-	-	-	8
Fruit farming	-	\$95	\$4,703	\$4,798	-	1	44	45
Dental laboratories	-	-	\$4,787	\$4,788	-	-	-	52
Nitrogenous fertilizer manufacturing	-	\$4,073	\$688	\$4,760	-	4	1	4
Other communication and energy wire manufacturing	-	\$4,462	\$122	\$4,584	-	11	-	12
Coffee and tea manufacturing	-	\$7	\$4,476	\$4,484	-	-	-	8
Other basic organic chemical manufacturing	-	\$2,217	\$2,175	\$4,391	-	2	2	4
Seafood product preparation and packaging	-	\$234	\$4,149	\$4,383	-	1	15	15
Wineries	-	\$86	\$4,245	\$4,331	-	-	-	11
Sand, gravel, clay, and refractory mining	-	\$3,911	\$30	\$3,941	-	21	-	21
Electromedical apparatus manufacturing	-	\$29	\$3,835	\$3,865	-	-	-	9
Other computer peripheral equipment manufacturing	-	\$532	\$3,269	\$3,801	-	1	7	8
Fertilizer, mixing only, manufacturing	-	\$3,632	\$168	\$3,800	-	7	-	8
Magnetic and optical recording media manufacturing	-	\$1,787	\$2,012	\$3,799	-	4	4	8

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Laminated plastics plate, sheet, and shapes	-	\$2,890	\$893	-	11	4
Fabricated structural metal manufacturing	-	\$3,545	\$62	-	13	-
Accessories and other apparel manufacturing	-	\$52	\$3,525	-	-	25
Mixes and dough made from purchased flour	-	\$29	\$3,532	-	-	8
Bowling centers	-	-	\$3,508	-	-	63
Sugar manufacturing	-	\$46	\$3,397	-	-	6
Resilient floor covering manufacturing	-	\$3,221	\$161	-	10	1
Poultry and egg production	-	\$44	\$3,335	-	-	6
Textile and fabric finishing mills	-	\$253	\$3,011	-	1	13
Other basic inorganic chemical manufacturing	-	\$1,555	\$1,610	-	3	3
Nonchocolate confectionery manufacturing	-	\$26	\$3,106	-	-	9
Phosphatic fertilizer manufacturing	-	\$2,959	\$144	-	3	-
Facilities support services	-	\$1,984	\$1,048	-	25	13
Stone mining and quarrying	-	\$2,957	\$20	-	15	-
Paint and coating manufacturing	-	\$2,897	\$74	-	5	-
Metal coating and nonprecious engraving	-	\$2,641	\$327	-	16	2
Roasted nuts and peanut butter manufacturing	-	\$11	\$2,882	-	-	6
Industrial gas manufacturing	-	\$748	\$2,111	-	1	2
Tortilla manufacturing	-	\$62	\$2,646	-	-	16
Elevator and moving stairway manufacturing	-	\$2,672	\$30	-	9	-
Frozen food manufacturing	-	\$36	\$2,646	-	0	9
Photographic and photocopying equipment manufacturing	-	\$345	\$2,288	-	1	5
Ornamental and architectural metal work manufacturing	-	\$2,511	\$76	-	13	-
Hand and edge tool manufacturing	-	\$2,066	\$473	-	10	2
Blind and shade manufacturing	-	\$1	\$2,523	-	-	17
Analytical laboratory instrument manufacturing	-	\$1,524	\$901	-	4	2
Mayonnaise, dressing, and sauce manufacturing	-	\$64	\$2,334	-	-	6
Tree nut farming	-	\$36	\$2,329	-	-	16
Motorcycle, bicycle, and parts manufacturing	-	\$208	\$2,125	-	1	5
Dry pasta manufacturing	-	\$13	\$2,195	-	-	6
Sign manufacturing	-	\$1,157	\$995	-	10	9
Dental equipment and supplies manufacturing	-	\$1	\$2,138	-	-	7
Jewelry and silverware manufacturing	-	\$28	\$2,108	-	-	9
Software reproducing	-	\$1,087	\$1,004	-	3	5
Electron tube manufacturing	-	\$85	\$1,987	-	-	6
Breakfast cereal manufacturing	-	\$12	\$2,041	-	-	2
Spring and wire product manufacturing	-	\$1,742	\$290	-	9	2
Other leather product manufacturing	-	\$222	\$1,785	-	2	12
Metal can, box, and other container manufacturing	-	\$903	\$1,092	-	2	2
Power-driven handtool manufacturing	-	\$1,120	\$873	-	2	2
Animal production, except cattle and poultry and eggs	-	\$60	\$1,928	-	1	37
Dog and cat food manufacturing	-	\$27	\$1,960	-	-	2
Other concrete product manufacturing	-	\$1,969	\$18	-	11	-
Electric housewares and household fan manufacturing	-	\$1,023	\$963	-	3	3

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Broadcast and wireless communications equipment	-	\$752	\$1,216	-	1	2
Showcases, partitions, shelving, and lockers	-	\$1,595	\$316	-	10	2
Buttons, pins, and all other miscellaneous manufacturing	-	\$1,351	\$520	-	8	3
Plastics material and resin manufacturing	-	\$1,110	\$694	-	1	1
Printing ink manufacturing	-	\$990	\$790	-	2	2
Surface active agent manufacturing	-	\$563	\$1,202	-	1	1
Nonferrous metal, except copper and aluminum, shaping	-	\$1,383	\$313	-	3	1
Paperboard container manufacturing	-	\$1,412	\$278	-	4	1
Musical instrument manufacturing	-	\$40	\$1,650	-	-	15
Synthetic dye and pigment manufacturing	-	\$1,000	\$662	-	2	1
Audio and video media reproduction	-	\$702	\$1,630	-	3	4
Iron and steel mills	-	\$1,530	\$73	-	2	-
Glass container manufacturing	-	\$105	\$1,491	-	-	5
Turned product and screw, nut, and bolt manufacturing	-	\$1,305	\$286	-	7	1
Wiring device manufacturing	-	\$1,530	\$53	-	5	-
Footwear manufacturing	-	-	\$1,572	-	-	12
Copper wire, except mechanical, drawing	-	\$1,426	\$51	-	2	-
Flavoring syrup and concentrate manufacturing	-	\$56	\$1,403	-	-	2
Photographic film and chemical manufacturing	-	\$546	\$898	-	1	2
Construction machinery manufacturing	-	\$1,413	\$31	-	2	-
Pesticide and other agricultural chemical manufacturing	-	\$498	\$941	-	-	1
Ready-mix concrete manufacturing	-	\$1,422	\$9	-	5	-
Relay and industrial control manufacturing	-	\$1,294	\$129	-	5	1
Frozen cakes and other pastries manufacturing	-	\$26	\$1,338	-	-	8
Travel trailer and camper manufacturing	-	\$1	\$1,358	-	-	7
Rendering and meat byproduct processing	-	\$249	\$1,080	-	-	2
Telephone apparatus manufacturing	-	\$318	\$1,010	-	-	1
Motor home manufacturing	-	-	\$1,325	-	-	4
Scales, balances, and miscellaneous general purpose machinery	-	\$988	\$337	-	4	1
Saw blade and handsaw manufacturing	-	\$1,272	\$43	-	7	-
Metal heat treating	-	\$1,171	\$137	-	5	1
Prefabricated wood building manufacturing	-	\$1,256	\$12	-	7	-
Hardware manufacturing	-	\$1,176	\$48	-	5	-
Motor and generator manufacturing	-	\$1,125	\$83	-	4	-
Aircraft manufacturing	-	\$343	\$830	-	1	2
Prepress services	-	\$759	\$402	-	5	2
Other household and institutional furniture	-	\$170	\$978	-	1	5
Primary battery manufacturing	-	\$24	\$1,101	-	-	3
Manifold business forms printing	-	\$716	\$381	-	4	2
Welding and soldering equipment manufacturing	-	\$886	\$196	-	3	1
Fishing	-	\$52	\$1,021	-	1	28
Flour milling	-	\$22	\$1,036	-	-	1
Prefabricated metal buildings and components	-	\$1,024	\$20	-	4	-
Farm machinery and equipment manufacturing	-	\$436	\$599	-	1	2

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts				
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total		
Optical instrument and lens manufacturing	-	\$575	\$415	\$990	-	2	2	4
Industrial process variable instruments	-	\$491	\$480	\$971	-	2	2	4
Fats and oils refining and blending	-	\$21	\$824	\$845	-	-	1	1
Books printing	-	\$196	\$643	\$839	-	1	2	3
Other engine equipment manufacturing	-	\$322	\$503	\$824	-	1	1	1
Storage battery manufacturing	-	\$342	\$477	\$819	-	1	2	3
Office machinery manufacturing	-	\$329	\$443	\$772	-	1	1	2
Other rubber product manufacturing	-	\$623	\$112	\$734	-	3	1	4
Steel wire drawing	-	\$676	\$47	\$724	-	1	-	2
Cutting tool and machine tool accessory manufacturing	-	\$511	\$204	\$715	-	4	1	5
Electric power and specialty transformer manufacturing	-	\$456	\$247	\$703	-	2	1	3
Carpet and rug mills	-	\$503	\$194	\$697	-	1	-	1
Sporting and athletic goods manufacturing	-	\$8	\$680	\$688	-	-	3	3
Computer terminal manufacturing	-	\$117	\$549	\$665	-	-	1	1
Forest nurseries, forest products, and timber tracts	-	\$616	\$18	\$634	-	1	-	1
Plastics and rubber industry machinery	-	\$543	\$77	\$620	-	3	-	3
Knit fabric mills	-	\$14	\$602	\$615	-	-	4	4
Totalizing fluid meters and counting devices	-	\$386	\$218	\$604	-	1	1	2
Metal household furniture manufacturing	-	\$20	\$569	\$590	-	-	3	3
Support activities for oil and gas operations	-	\$301	\$284	\$585	-	1	1	3
Heavy duty truck manufacturing	-	-	\$572	\$572	-	-	1	1
Synthetic rubber manufacturing	-	\$372	\$185	\$558	-	1	-	1
Distilleries	-	\$22	\$532	\$553	-	-	1	1
Vitreous china and earthenware articles manufacturing	-	\$12	\$509	\$521	-	-	6	6
Mineral wool manufacturing	-	\$464	\$49	\$513	-	1	-	1
Other animal food manufacturing	-	\$26	\$483	\$509	-	-	1	1
Watch, clock, and other measuring and controlling device manufacturing	-	\$73	\$397	\$470	-	-	1	2
Metal tank, heavy gauge, manufacturing	-	\$451	\$4	\$455	-	2	-	2
Wet corn milling	-	\$124	\$323	\$447	-	-	-	-
Institutional furniture manufacturing	-	\$288	\$138	\$426	-	2	1	3
Broom, brush, and mop manufacturing	-	\$375	\$50	\$425	-	2	-	2
Rolled steel shape manufacturing	-	\$399	\$19	\$418	-	1	-	1
Sawmill and woodworking machinery	-	\$214	\$184	\$397	-	1	1	2
Search, detection, and navigation instruments	-	\$101	\$296	\$397	-	-	1	1
Wood office furniture manufacturing	-	\$304	\$89	\$393	-	1	-	2
Iron, steel pipe and tube from purchased steel	-	\$373	\$18	\$390	-	-	-	1
Enameled iron and metal sanitary ware manufacturing	-	\$363	\$18	\$382	-	2	-	2
Printing machinery and equipment manufacturing	-	\$243	\$112	\$355	-	1	1	2
Electricity and signal testing instruments	-	\$173	\$174	\$347	-	1	1	1
Coated and laminated paper and packaging materials	-	\$228	\$118	\$346	-	1	-	1
Rice milling	-	\$1	\$341	\$342	-	-	1	1
Other nonmetallic mineral mining	-	\$161	\$180	\$340	-	1	1	2
All other industrial machinery manufacturing	-	\$63	\$270	\$333	-	-	1	1
Special tool, die, jig, and fixture manufacturing	-	\$232	\$98	\$330	-	-	2	3

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Gypsum product manufacturing	-	\$321	\$5	-	1	-
Miscellaneous electrical equipment manufacturing	-	\$208	\$109	-	1	-
Automatic vending, commercial laundry and drycleaning machinery	-	\$144	\$166	-	1	1
Industrial truck, trailer, and stacker manufacturing	-	\$158	\$151	-	1	1
Broadwoven fabric mills	-	\$17	\$291	-	-	2
Plate work manufacturing	-	\$272	\$33	-	1	-
Outletry and flatware, except precious, manufacturing	-	\$63	\$241	-	-	1
Textile bag and canvas mills	-	\$186	\$117	-	1	1
Irradiation apparatus manufacturing	-	\$14	\$283	-	-	1
Kitchen utensil, pot, and pan manufacturing	-	\$27	\$265	-	-	1
Lawn and garden equipment manufacturing	-	\$45	\$242	-	-	1
Speed changers and mechanical power transmission equipment	-	\$199	\$85	-	1	-
Miscellaneous fabricated metal product manufacturing	-	\$263	\$15	-	1	-
Custom roll forming	-	\$258	\$16	-	1	-
Miscellaneous nonmetallic mineral products	-	\$223	\$49	-	1	-
Food product machinery manufacturing	-	\$182	\$90	-	1	-
Small arms manufacturing	-	\$9	\$262	-	-	2
Grain farming	-	\$13	\$252	-	-	4
Fluid power cylinder and actuator manufacturing	-	\$249	\$4	-	1	-
Concrete block and brick manufacturing	-	\$246	\$1	-	1	-
Hunting and trapping	-	-	\$246	-	-	2
Other aluminum rolling and drawing	-	\$197	\$47	-	-	-
Motor vehicle body manufacturing	-	\$38	\$205	-	-	1
Nonwoven fabric mills	-	\$163	\$78	-	1	-
Other major household appliance manufacturing	-	\$233	\$4	-	1	-
All other forging and stamping	-	\$157	\$80	-	1	-
Fluid power pump and motor manufacturing	-	\$221	\$9	-	1	-
Fiber, yarn, and thread mills	-	\$12	\$218	-	-	1
Surface-coated paperboard manufacturing	-	\$67	\$151	-	-	1
All other petroleum and coal products manufacturing	-	\$114	\$96	-	-	-
Gasket, packing, and sealing device manufacturing	-	\$169	\$41	-	1	-
Other miscellaneous textile product mills	-	\$54	\$152	-	-	1
Office supplies, except paper, manufacturing	-	\$61	\$144	-	-	1
Other hosiery and sock mills	-	-	\$198	-	-	1
Aircraft engine and engine parts manufacturing	-	\$83	\$109	-	-	-
Oil and gas field machinery and equipment	-	\$171	\$20	-	1	-
All other transportation equipment manufacturing	-	\$45	\$145	-	-	-
Sugarcane and sugar beet farming	-	\$4	\$185	-	-	4
Rubber and plastics hose and belting manufacturing	-	\$158	\$19	-	1	-
Household vacuum cleaner manufacturing	-	\$76	\$97	-	-	1
Other tobacco product manufacturing	-	-	\$166	-	-	-
Boat building	-	\$1	\$164	-	-	1
Tradebinding and related work	-	\$55	\$109	-	1	1
Primary nonferrous metal, except copper and aluminum	-	\$79	\$83	-	-	-

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Ball and roller bearing manufacturing	-	\$84	\$73	-	-	-
Turbine and turbine generator set units manufacturing	-	\$63	\$93	-	-	-
Aluminum sheet, plate, and foil manufacturing	-	\$124	\$26	-	-	-
Abrasive product manufacturing	-	\$122	\$21	-	1	-
Other aircraft parts and equipment	-	\$57	\$84	-	-	-
Semiconductor machinery manufacturing	-	\$59	\$80	-	-	-
Explosives manufacturing	-	\$108	\$29	-	1	-
Secondary processing of other nonferrous metal	-	\$65	\$69	-	-	-
Other oilseed processing	-	\$10	\$123	-	-	-
Carbon and graphite product manufacturing	-	\$70	\$60	-	-	-
Industrial mold manufacturing	-	\$111	\$16	-	1	-
Pulp mills	-	\$112	\$4	-	-	-
Metal cutting machine tool manufacturing	-	\$76	\$36	-	-	-
Household cooking appliance manufacturing	-	\$32	\$77	-	-	-
Conveyor and conveying equipment manufacturing	-	\$82	\$25	-	-	-
Leather and hide tanning and finishing	-	\$13	\$85	-	-	-
Packaging machinery manufacturing	-	\$31	\$68	-	-	-
All other converted paper product manufacturing	-	\$78	\$20	-	-	-
Cotton farming	-	\$8	\$85	-	-	-
Coated and uncoated paper bag manufacturing	-	\$47	\$44	-	-	-
Copper rolling, drawing, and extruding	-	\$85	\$5	-	-	-
Flexible packaging foil manufacturing	-	\$10	\$79	-	-	-
Blankbook and looseleaf binder manufacturing	-	\$25	\$64	-	-	-
Fabric coating mills	-	\$49	\$37	-	-	-
Aluminum extruded product manufacturing	-	\$72	\$12	-	-	-
Sheer hosiery mills	-	-	\$84	-	-	1
Soybean processing	-	\$6	\$75	-	-	-
Military armored vehicles and tank parts manufacturing	-	-	\$80	-	-	-
Gold, silver, and other metal ore mining	-	\$41	\$36	-	-	-
Overhead cranes, hoists, and monorail systems	-	\$64	\$7	-	-	-
Sanitary paper product manufacturing	-	\$2	\$69	-	-	-
Power boiler and heat exchanger manufacturing	-	\$67	\$1	-	-	-
Laboratory apparatus and furniture manufacturing	-	\$4	\$57	-	-	-
Clay refractory and other structural clay products	-	\$60	\$0	-	-	-
Air and gas compressor manufacturing	-	\$56	\$2	-	-	-
Office furniture, except wood, manufacturing	-	\$31	\$27	-	-	-
Concrete pipe manufacturing	-	\$55	\$2	-	-	-
Petrochemical manufacturing	-	\$27	\$29	-	-	-
Cement manufacturing	-	\$54	\$1	-	-	-
Narrow fabric mills and schiffli embroidery	-	\$10	\$44	-	-	-
Lighting fixture manufacturing	-	\$43	\$3	-	-	-
Pump and pumping equipment manufacturing	-	\$30	\$14	-	-	-
Iron and steel forging	-	\$26	\$13	-	-	-
Guided missile and space vehicle manufacturing	-	\$14	\$22	-	-	-

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Ship building and repairing	-	\$15	\$21	-	-	-
Railroad rolling stock manufacturing	-	\$25	\$7	-	-	-
Ferroalloy and related product manufacturing	-	\$18	\$13	-	-	-
Mining machinery and equipment manufacturing	-	\$25	\$6	-	-	-
Noncellulosic organic fiber manufacturing	-	\$14	\$14	-	-	-
Drilling oil and gas wells	-	\$14	\$13	-	-	-
Creamery butter manufacturing	-	\$27	\$27	-	-	-
Rolling mill and other metalworking machinery	-	\$19	\$7	-	-	-
Porcelain electrical supply manufacturing	-	\$18	\$5	-	-	-
Aluminum foundries	-	\$16	\$6	-	-	-
Metal forming machine tool manufacturing	-	\$16	\$5	-	-	-
Paper industry machinery manufacturing	-	\$11	\$7	-	-	-
Die-cut paper office supplies manufacturing	-	\$10	\$7	-	-	-
Malt manufacturing	-	-	\$16	-	-	-
Household refrigerator and home freezer manufacturing	-	\$2	\$14	-	-	-
Textile machinery manufacturing	-	\$4	\$8	-	-	-
Nonferrous forging	-	\$7	\$4	-	-	-
Propulsion units and parts for space vehicles and guided missiles	-	\$5	\$6	-	-	-
Ferrous metal foundries	-	\$11	-	-	-	-
Lime manufacturing	-	\$11	-	-	-	-
Vitreous china plumbing fixture manufacturing	-	\$9	\$1	-	-	-
Ammunition manufacturing	-	-	\$10	-	-	-
Air purification equipment manufacturing	-	\$7	\$1	-	-	-
Industrial process furnace and oven manufacturing	-	\$3	\$4	-	-	-
Nonferrous foundries, except aluminum	-	\$5	\$2	-	-	-
Brick and structural clay tile manufacturing	-	\$7	-	-	-	-
Alumina refining	-	\$3	\$4	-	-	-
Coal mining	-	\$2	\$4	-	-	-
Secondary smelting and alloying of aluminum	-	\$4	\$1	-	-	-
Burial casket manufacturing	-	-	\$4	-	-	-
Industrial and commercial fan and blower manufacturing	-	\$3	-	-	-	-
Primary aluminum production	-	\$2	\$1	-	-	-
Paper and paperboard mills	-	\$1	\$2	-	-	-
Envelope manufacturing	-	\$1	\$1	-	-	-
Truck trailer manufacturing	-	-	\$2	-	-	-
Stationery and related product manufacturing	-	\$1	\$2	-	-	-
Tire manufacturing	-	\$1	\$1	-	-	-
Ground or treated minerals and earths manufacturing	-	\$2	-	-	-	-
Oilseed farming	-	-	\$1	-	-	-
Measuring and dispensing pump manufacturing	-	\$1	-	-	-	-
Primary smelting and refining of copper	-	\$1	-	-	-	-
Industrial pattern manufacturing	-	\$1	-	-	-	-
Electric lamp bulb and part manufacturing	-	-	\$1	-	-	-
Support activities for other mining	-	\$1	-	-	-	-

APPENDIX A—DETAILED CALIFORNIA SECTOR IMPACTS

Sector Name	Output Impacts (in thousands)			Employment Impacts		
	Direct Impact	Indirect Impact	Total	Direct Impact	Indirect Impact	Total
Household laundry equipment manufacturing	-	-	-	-	-	-
Secondary processing of copper	-	-	-	-	-	-
Nonclay refractory manufacturing	-	-	-	-	-	-
Cellulosic organic fiber manufacturing	-	-	-	-	-	-
AC, refrigeration, and forced air heating	-	-	-	-	-	-
Heating equipment, except warm air furnaces	-	-	-	-	-	-
Tire cord and tire fabric mills	-	-	-	-	-	-
Tobacco farming	-	-	-	-	-	-
Iron ore mining	-	-	-	-	-	-
Copper, nickel, lead, and zinc mining	-	-	-	-	-	-
New residential additions and alterations	-	-	-	-	-	-
New farm housing units	-	-	-	-	-	-
Manufacturing and industrial buildings	-	-	-	-	-	-
Commercial and institutional buildings	-	-	-	-	-	-
Highway, street, bridge, and tunnel construction	-	-	-	-	-	-
Water, sewer, and pipeline construction	-	-	-	-	-	-
Other new construction	-	-	-	-	-	-
Maintenance and repair of highways, streets, bridges, and tunnels	-	-	-	-	-	-
Tobacco stemming and redrying	-	-	-	-	-	-
Cigarette manufacturing	-	-	-	-	-	-
Manufactured home, mobile home, manufacturing	-	-	-	-	-	-
Other ordnance and accessories manufacturing	-	-	-	-	-	-
Federal electric utilities	-	-	-	-	-	-
Noncomparable imports	-	-	-	-	-	-
Scrap	-	-	-	-	-	-
Used and secondhand goods	-	-	-	-	-	-
State & Local Education	-	-	-	-	-	-
State & Local Non-Education	-	-	-	-	-	-
Federal Military	-	-	-	-	-	-
Federal Non-Military	-	-	-	-	-	-

Sacramento Regional Research Institute, August 2008
 Data Source: IMPLAN, 2006 Coefficients based on United States Census Bureau information
 Note: Differences due to rounding.

APPENDIX B—INDUSTRY GROUPINGS

CALIFORNIA INDUSTRY GROUPINGS

<i>Industry Grouping</i>	<i>Output (in thousands)</i>	<i>Employment</i>
California Total	\$3,202,734,560	20,620,101
Housing	\$353,882,945	1,206,363
Owner-occupied dwellings	\$129,828,969	0
65% of Real Estate	\$124,772,446	636,137
New residential 1-unit structures	\$68,855,055	397,042
New residential additions and alterations	\$16,625,742	77,712
New multifamily housing structures	\$10,117,082	72,344
Maintenance and repair of farm and nonfarm residential structures	\$3,683,651	23,128
Wholesale and Retail Trade	\$319,371,519	2,898,187
Retail trade subtotal	\$170,985,878	2,105,454
Motor vehicle and parts dealers	\$29,363,246	236,365
Food and beverage stores	\$26,951,973	355,986
General merchandise stores	\$18,563,105	304,113
Clothing and clothing accessories stores	\$18,058,053	222,004
Building material and garden supply stores	\$14,584,229	146,045
Nonstore retailers	\$13,362,133	184,470
Health and personal care stores	\$9,944,029	125,927
Gasoline stations	\$9,629,211	60,013
Furniture and home furnishings stores	\$8,430,796	80,255
Electronics and appliance stores	\$8,238,233	92,775
Miscellaneous store retailers	\$8,134,980	189,586
Sporting goods, hobby, book and music stores	\$5,725,890	107,915
Wholesale trade	\$148,385,641	792,733
Professional, Scientific, and Technical Services	\$243,976,178	1,765,828
Architectural and engineering services	\$40,174,359	303,849
Legal services	\$36,558,223	240,369
Scientific research and development services	\$24,740,418	173,878
Management consulting services	\$22,053,887	156,997
Accounting and bookkeeping services	\$20,733,578	201,422
Custom computer programming services	\$20,380,930	188,935
All other miscellaneous professional and technical services	\$18,324,895	32,268
Environmental and other technical consulting	\$17,748,943	112,398
Advertising and related services	\$15,370,977	108,388
Computer systems design services	\$11,039,557	112,083
Specialized design services	\$7,114,078	46,731
Other computer related services, including facilities management	\$4,865,708	22,324
Veterinary services	\$3,590,712	50,007
Photographic services	\$1,279,913	16,179
Computer and Electronic Product Manufacturing	\$237,547,527	304,098
Electronic computer manufacturing	\$102,695,383	39,504
Semiconductors and related device manufacturing	\$54,154,242	61,221
Search, detection, and navigation instruments	\$16,918,494	48,231
All other electronic component manufacturing	\$10,636,972	46,564
Broadcast and wireless communications equipment	\$9,616,918	16,651
Audio and video equipment manufacturing	\$6,859,823	8,669
Telephone apparatus manufacturing	\$6,032,379	6,622
Electricity and signal testing instruments	\$5,840,744	16,362
Computer storage device manufacturing	\$5,508,863	6,901
Analytical laboratory instrument manufacturing	\$4,254,945	10,602
Other computer peripheral equipment manufacturing	\$3,629,492	7,662
Industrial process variable instruments	\$2,286,447	9,434
Magnetic and optical recording media manufacturing	\$1,630,049	3,513
Electron tube manufacturing	\$1,489,424	4,200
Other communications equipment manufacturing	\$1,401,080	3,747
Watch, clock, and other measuring and control	\$1,131,420	4,089
Computer terminal manufacturing	\$781,843	1,661
Software reproducing	\$688,684	1,801
Audio and video media reproduction	\$670,050	2,624
Irradiation apparatus manufacturing	\$516,236	971
Automatic environmental control manufacturing	\$501,558	2,277
Totalizing fluid meters and counting devices	\$302,481	792

APPENDIX B—INDUSTRY GROUPINGS

<i>Industry Grouping</i>	<i>Output (in thousands)</i>	<i>Employment</i>
Finance and Insurance	\$211,287,880	938,878
Monetary authorities and depository credit intermediation	\$59,141,273	197,558
Insurance carriers	\$46,600,145	164,618
Securities, commodity contracts, investments	\$40,577,609	255,267
Nondepository credit intermediation and related activities	\$31,815,572	155,992
Insurance agencies, brokerages, and related	\$20,472,828	126,267
Funds, trusts, and other financial vehicles	\$12,680,453	39,176
Information	\$204,504,386	554,814
Telecommunications	\$58,512,512	132,629
Motion picture and video industries	\$41,199,102	174,143
Cable networks and program distribution	\$28,990,082	24,734
Software publishers	\$24,095,385	49,408
Information services	\$19,925,273	41,038
Radio and television broadcasting	\$7,302,853	32,663
Data processing services	\$6,581,021	25,371
Newspaper publishers	\$4,693,098	35,748
Periodical publishers	\$4,318,627	16,450
Sound recording industries	\$3,470,812	5,750
Book publishers	\$3,093,826	10,005
Database, directory, and other publishers	\$2,321,795	6,875
State and Local Government	\$182,578,990	2,121,902
State & Local Non-Education	\$102,392,219	1,137,377
State & Local Education	\$36,266,355	819,169
Other State and local government enterprises	\$24,381,744	90,510
State and local government electric utilities	\$16,317,096	31,779
State and local government passenger transit	\$3,221,576	43,067
Health Care and Social Assistance	\$160,739,148	1,701,940
Offices of physicians, dentists, and other health practitioners	\$58,006,527	511,868
Hospitals	\$51,935,301	379,494
Other ambulatory health care services	\$19,904,488	125,864
Nursing and residential care facilities	\$12,078,112	232,494
Social assistance, except child day care services	\$9,114,348	261,728
Child day care services	\$5,202,143	120,789
Home health care services	\$4,498,229	69,703
Non-Residential Real Estate Activities	\$155,209,201	1,057,344
35% of Real Estate	\$67,185,163	342,535
Commercial and institutional buildings	\$41,032,906	337,118
Other new construction	\$12,970,127	110,491
Maintenance and repair of nonresidential buil	\$11,252,936	78,634
Highway, street, bridge, and tunnel construction	\$8,124,251	59,829
Manufacturing and industrial buildings	\$5,285,873	47,479
Water, sewer, and pipeline construction	\$4,657,694	31,804
Maintenance and repair of highways, streets, bridges, and tunnels	\$2,412,564	22,734
Other maintenance and repair construction	\$2,287,687	26,720
Agriculture and Food Processing	\$131,237,540	686,718
Wineries	\$10,397,737	26,607
Fruit and vegetable canning and drying	\$10,310,940	22,253
Soft drink and ice manufacturing	\$9,599,883	14,235
Fruit farming	\$8,419,935	79,258
Agriculture and forestry support activities	\$7,367,126	225,752
Cattle ranching and farming	\$6,959,684	46,271
Vegetable and melon farming	\$6,524,957	33,621
Fluid milk manufacturing	\$5,399,891	8,269
Bread and bakery product, except frozen, manufacturing	\$4,540,537	29,677
Cheese manufacturing	\$4,029,947	5,302
Greenhouse and nursery production	\$3,860,621	29,385
Tree nut farming	\$3,706,804	25,583
Frozen food manufacturing	\$3,683,257	12,260
All other crop farming	\$3,165,630	14,396
Breweries	\$3,103,749	3,255
Meat processed from carcasses	\$2,922,031	6,307
All other food manufacturing	\$2,450,625	9,099
Roasted nuts and peanut butter manufacturing	\$2,321,476	4,676
Animal, except poultry, slaughtering	\$2,097,915	5,303

APPENDIX B—INDUSTRY GROUPINGS

<i>Industry Grouping</i>	<i>Output (in thousands)</i>	<i>Employment</i>
Agriculture and Food Processing (continued)	\$131,237,540	686,718
Poultry processing	\$2,026,500	8,647
Other animal food manufacturing	\$1,762,050	2,385
Other snack food manufacturing	\$1,684,634	2,789
Dog and cat food manufacturing	\$1,597,925	1,426
Ice cream and frozen dessert manufacturing	\$1,362,070	2,648
Confectionery manufacturing from purchased chocolate	\$1,303,854	3,473
Logging	\$1,200,769	4,567
Poultry and egg production	\$1,134,546	1,941
Other oilseed processing	\$1,114,453	519
Breakfast cereal manufacturing	\$1,112,180	1,233
Confectionery manufacturing from cacao beans	\$1,096,294	1,913
Spice and extract manufacturing	\$1,071,831	2,215
Tortilla manufacturing	\$1,022,435	5,985
Dry, condensed, and evaporated dairy products	\$847,745	1,010
Cookie and cracker manufacturing	\$842,515	2,210
Fats and oils refining and blending	\$837,975	621
Cotton farming	\$770,016	3,504
Flour milling	\$763,828	990
Coffee and tea manufacturing	\$703,083	1,282
Forest nurseries, forest products, and timber tracts	\$685,525	1,157
Seafood product preparation and packaging	\$679,518	2,389
Sugar manufacturing	\$612,367	1,023
Flavoring syrup and concentrate manufacturing	\$596,214	852
Rice milling	\$589,780	973
Nonchocolate confectionery manufacturing	\$567,655	1,556
Grain farming	\$529,298	7,224
Dry pasta manufacturing	\$504,431	1,317
Mixes and dough made from purchased flour	\$501,967	1,107
Mayonnaise, dressing, and sauce manufacturing	\$487,371	1,251
Rendering and meat byproduct processing	\$462,726	793
Wet corn milling	\$420,295	338
Distilleries	\$418,011	413
Animal production, except cattle and poultry	\$335,402	6,416
Fishing	\$212,219	5,729
Frozen cakes and other pastries manufacturing	\$198,332	1,133
Soybean processing	\$97,876	35
Sugarcane and sugar beet farming	\$68,320	1,555
Malt manufacturing	\$65,886	63
Hunting and trapping	\$42,665	336
Other tobacco product manufacturing	\$21,186	18
Oilseed farming	\$18,666	164
Creamery butter manufacturing	\$4,382	9
Management and Support	\$130,100,028	1,569,240
Management of companies and enterprises	\$45,372,930	221,398
Employment services	\$19,570,832	608,658
Office administrative services	\$16,962,035	83,141
Services to buildings and dwellings	\$16,948,877	289,450
Waste management and remediation services	\$7,847,258	42,674
Investigation and security services	\$6,406,468	157,879
Business support services	\$5,747,923	75,314
Travel arrangement and reservation services	\$5,267,288	39,037
Other support services	\$5,026,094	39,870
Facilities support services	\$950,323	11,819
Leisure and Hospitality	\$121,983,652	1,900,889
Food services and drinking places	\$64,511,012	1,163,854
Hotels and motels, including casino hotels	\$20,170,014	212,655
Other amusement, gambling, and recreation industries	\$10,373,099	123,796
Independent artists, writers, and performers	\$10,257,188	77,309
Promoters of performing arts and sports and agents for public figures	\$4,343,030	70,746
Spectator sports	\$4,073,534	70,775
Fitness and recreational sports centers	\$2,955,980	79,963
Performing arts companies	\$2,408,644	70,517
Museums, historical sites, zoos, and parks	\$1,489,766	14,558
Other accommodations	\$1,016,161	9,751
Bowling centers	\$385,224	6,965

APPENDIX B—INDUSTRY GROUPINGS

<i>Industry Grouping</i>	<i>Output (in thousands)</i>	<i>Employment</i>
Transportation and Warehousing	\$79,324,312	679,733
Truck transportation	\$23,981,100	182,086
Scenic and sightseeing transportation and support activities for transportation	\$11,541,159	91,005
Air transportation	\$11,277,998	46,374
Postal service	\$7,857,890	113,002
Couriers and messengers	\$7,229,995	99,282
Warehousing and storage	\$5,574,035	72,390
Rail transportation	\$3,487,150	12,545
Transit and ground passenger transportation	\$3,182,700	56,964
Pipeline transportation	\$2,968,937	2,308
Water transportation	\$2,223,348	3,777
Other Services	\$75,002,406	1,211,561
Automotive repair and maintenance, except car washes	\$15,349,436	166,435
Other personal services	\$11,637,012	62,551
Religious organizations	\$9,543,275	69,579
Civic, social, professional and similar organizations	\$6,602,642	141,290
Personal care services	\$5,088,393	99,666
Commercial machinery repair and maintenance	\$4,431,017	30,201
Grantmaking and giving and social advocacy organizations	\$4,078,961	85,509
Private households	\$4,056,144	380,767
Household goods repair and maintenance	\$3,525,606	16,748
Electronic equipment repair and maintenance	\$3,487,094	22,714
Drycleaning and laundry services	\$3,269,082	69,891
Car washes	\$2,576,615	48,679
Death care services	\$1,357,129	17,531
Medical Manufacturing	\$65,235,446	111,785
Pharmaceutical and medicine manufacturing	\$44,407,809	45,737
Surgical and medical instrument manufacturing	\$7,902,735	22,295
Electromedical apparatus manufacturing	\$5,344,340	12,380
Surgical appliance and supplies manufacturing	\$3,819,545	11,597
Dental equipment and supplies manufacturing	\$1,365,193	4,192
Ophthalmic goods manufacturing	\$1,160,775	4,628
Dental laboratories	\$875,063	9,571
Laboratory apparatus and furniture manufacturing	\$359,986	1,385
Transportation Equipment Manufacturing	\$56,720,781	130,142
Aircraft manufacturing	\$13,974,388	25,273
Automobile and light truck manufacturing	\$10,757,084	7,422
Guided missile and space vehicle manufacturing	\$8,063,254	17,182
Motor vehicle parts manufacturing	\$6,601,542	19,072
Other aircraft parts and equipment	\$6,184,153	25,382
Aircraft engine and engine parts manufacturing	\$1,665,005	3,759
Ship building and repairing	\$1,346,306	7,234
Motorcycle, bicycle, and parts manufacturing	\$1,278,261	3,039
Propulsion units and parts for space vehicles	\$1,221,924	4,617
Heavy duty truck manufacturing	\$1,162,380	1,210
Travel trailer and camper manufacturing	\$1,063,885	5,303
Motor vehicle body manufacturing	\$908,939	3,449
Military armored vehicles and tank parts manufacturing	\$558,809	1,150
Boat building	\$533,997	2,280
Motor home manufacturing	\$531,034	1,615
All other transportation equipment manufacturing	\$479,758	905
Truck trailer manufacturing	\$283,342	988
Railroad rolling stock manufacturing	\$106,720	262
Utilities	\$53,034,144	59,788
Natural gas distribution	\$32,730,813	33,635
Power generation and supply	\$19,231,988	21,204
Water, sewage and other systems	\$1,071,343	4,949
Federal Government	\$36,532,731	354,332
Federal Military	\$18,624,533	221,015
Federal Non-Military	\$17,251,480	105,666
Other Federal Government enterprises	\$656,718	27,651

Sacramento Regional Research Institute, August 2008

Data Source: IMPLAN, 2006 coefficients

Note: Differences due to rounding.

APPENDIX C—CALIFORNIA POPULATION DISTRIBUTION

POPULATION DISTRIBUTION OF CALIFORNIA'S COUNTIES

