
ANALYSIS OF POTENTIAL ECONOMIC AND FISCAL IMPACTS
CLEAN CARS 2040 ACT (AB 1745)

Prepared for:
KERN COUNTY

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1.0 INTRODUCTION

This report evaluates the potential economic and fiscal impacts that the proposed Clean Cars 2040 Act (AB 1745) would have on Kern County. The analysis estimates countywide impacts, as well as impacts on each of the incorporated cities within the county.

1.1. Background on Clean Cars 2040 Act

As introduced, the Clean Cars 2040 Act (AB 1745) would require all new vehicle registrations in California (on or after January 1, 2040) to be zero-emissions vehicles (ZEV's). For purposes of the bill, ZEV's cannot produce exhaust emissions of any criteria pollutant or greenhouse gas under any operational mode. Thus, while the State's existing ZEV program¹ recognizes some hybrid vehicles (in particular, "plug-in hybrid" electric/gasoline cars) as ZEV's, AB 1745 would apply a stricter definition of "zero emissions" such that only all-electric vehicles would be considered ZEV's. For purposes of this analysis, it is assumed that existing (i.e., pre-2040) vehicles would be exempt from the law at the time it goes into effect. However, for practical purposes it is likely that after some phase-in period (during which most of the pre-existing vehicles would reach the end of their useful lives) the law would essentially eliminate the ownership of gasoline (and electric/gasoline hybrids) vehicles in California. The law would not apply to large commercial vehicles (larger than 10,000 pounds) or to vehicles owned by people moving into California from other states.

1.2. Kern County Business Types Most Likely to be Impacted

Kern County is recognized as the number one oil-producing county in the United States, representing 71% of California's oil production and 10% of total U.S. oil production². The oil and gas industry is the largest industry in Kern County in terms of domestic gross product and tax contributions. Ironically, virtually none of the oil produced in Kern County ends up being sold as gasoline in California, since the high sulfur content in Kern's oil makes it infeasible/cost prohibitive to refine it to a degree that would meet California's stringent air quality regulations. As such, AB 1745 (which would primarily affect gasoline consumption) is not expected to directly impact the oil and gas industry in the county.

Given that Kern County's oil and gas industry as a whole is not expected to be significantly impacted by AB 1745, the law's economic and fiscal impacts would primarily be focused on the following types of businesses:

Directly Impacted Business Categories

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- ¹ The Zero Emissions Vehicles program requires automakers to sell targeted numbers of ZEV's in California (and 9 other participating states) between 2011 and 2025. The targeted number of ZEV sales is tied to the automakers total sales in each state and applies different "credits" based on the types of ZEV's sold. For California the 15-year (2011-2025) target equates to approximately 1,500,000 ZEV's. As of mid-2017, cumulative ZEV sales in California totaled 301,155 or approximately 20% of the 15-year target (per data accessed at DrivingZEV.com). In January 2018, Governor Edmund G. Brown Jr. signed Executive Order B-48-18, which set a more ambitious target for ZEV's in California (the new target is 5 million ZEV's by 2030 compared to the original target of 1.5 million ZEV's by 2025).
 - ² Based on 2014 data published by Kern Economic Development Foundation.

- Retail gasoline sales
- Wholesale gasoline sales
- New and used automobile sales
- Automobile repair services and parts sales

As described further below, in addition to the business categories that would be directly impacted, this analysis considers closely related industries (e.g., truck transportation of gasoline) that would be indirectly affected by the reduction (and, possibly, the eventual elimination) of gasoline-powered vehicles.

1.3. Overview of Study Scope and Methodology

The analysis includes three major steps:

1. Estimate the **existing “economic footprint”** of the four major business categories that would be **directly** impacted by AB 1745 (i.e., retail gasoline sales, wholesale gasoline sales, automobile sales, and auto service/parts establishments). The combined contribution of these industries to the Kern County economy is quantified in terms of the following metrics:
 - a. Total dollar volume of business activity (i.e., gross sales)
 - b. Total employment
 - c. Total payroll
 - d. Major fiscal revenues (property tax, sales tax and state gasoline taxes)

Based on the latest year for which most data sources used in the analysis are available, 2016 is used as the benchmark year for “existing” conditions in the county.

2. Calculate the **indirect and induced impacts** generated by industries (and their employees) that are supported by the directly impacted businesses.
3. Establish a **baseline 2040 forecast** for gasoline-related business activities in Kern County. The baseline forecast represents the level of industry growth that would occur *in the absence of AB 1745* (i.e., what would happen if current market trends continue without additional regulatory/policy influences). This projection represents the future level of economic activity/benefits that would potentially be lost due to the implementation of AB 1745. The baseline forecast recognizes that, even without AB 1745, consumer preferences (influenced to some degree by existing government incentives/policies) are likely to result in increased adoption of all-electric vehicles. Based on reasonably foreseeable market trends (which are influenced to some extent by State and Federal policies already in place), per capita consumption of gasoline and gasoline-powered cars is likely to decline significantly. However, the decline in *per capita* gasoline consumption (and ownership in gasoline powered vehicles) would be offset to some degree by the substantial population growth projected for Kern County.

The study's findings are summarized for the following areas of geography:

- Kern County as a whole
- Unincorporated Kern County
- Each of the eleven incorporated cities in Kern County

In addition, property tax revenue accruing to other jurisdictions (e.g., school districts) is calculated and summarized in the report appendices.

All projections provided in this report are expressed in 2016 "constant" dollars (i.e., not escalated for future inflation), reflecting the 2016 benchmark year used in the analysis.

1.4. Potential Replacement of Gasoline-oriented Businesses that are Phased Out

It is recognized that industries continually evolve in response to market trends (i.e., changing consumer preferences), technological advancement and the imposition of new government regulations. Californians will continue to need transportation even if gasoline cars are ultimately eliminated from the scene. Thus, it is likely that some of the businesses impacted by AB 1745 would eventually be replaced by comparable activities allowed under the new policy. For example, it is likely that sales of gasoline-powered cars would be replaced by sales of ZEV's; gasoline stations would be replaced by electric vehicle charging facilities; service business focused on gasoline cars would shift to repairing ZEV's (although ZEV's are purported to require less maintenance), etc. However, it is not known if these "replacement" activities would employ the same workers, be in the same locations, have the same ownership, or generate the same amount of tax revenue as the displaced businesses. For example, electric vehicle charging facilities would not necessarily be located at existing gas stations, leaving a potential "urban decay" issue as gas stations are abandoned.

Given the uncertainty regarding the degree and nature of the potential "replacement" businesses, this study does not attempt to quantify the market response to AB 1745. Thus, the indicated impacts of the proposed law should not be interpreted as "net losses." Instead, the impacts are intended to represent the total existing (and potential future) contribution of the impacted business types to the Kern County economy. In this regard, the quantified impacts can be interpreted as the total volume of economic activity (including employment, business income and fiscal revenue) that is "at stake" due to the proposed law (even though a portion of the "lost" benefits would potentially be replaced by other activities).

2.0 EXECUTIVE SUMMARY

2.1. Existing Economic Footprint of Automobile and Gasoline Related Industries in Kern County

Table II-1, on the following page, summarizes the existing (2016) economic “footprint” of automobile and gasoline related industries in Kern County.³ The existing economic impacts include the following:

- **Total business activity supported.** The countywide volume of business activity in automobile and gasoline related industries in 2016 is estimated at \$2.9 billion. Through the “multiplier effects” of business and household spending, these businesses and their employees support an additional \$1.3 billion in indirect/induced business activity in the county. Thus, the total (direct plus indirect/induced) business activity supported by automobile and gasoline related industries in 2016 is estimated at \$4.2 billion.
- **Total jobs supported.** Automobile and gasoline related industries directly support nearly 6,500 jobs in Kern County. Based on the multiplier (indirect/induced) effects of these industries, an additional 1,800 jobs are supported in the county. Thus, total existing employment supported by these industries is estimated at approximately 8,300 jobs.
- **Total payroll generated.** The total direct payroll associated with automobile and gasoline related industries in Kern County is estimated at \$265 million in 2016 (an average of \$40,900 per job). Based on the multiplier (indirect/induced) effects of these industries, an additional \$48 million in annual payroll is generated in the county. Thus, total existing payroll generated by these industries is estimated at approximately \$313 million per year.
- **Total fiscal benefit to County of Kern.** Automobile and gasoline related industries generate an estimated total of \$91.2 million per year (in 2016) to the County of Kern. The largest components of this total are State Gas Tax (\$55.1 million), Sales Tax (\$29.2 million), and Property Tax (\$6.4 million).

• ³ The analysis uses a base year of 2016 since that is the latest full year for which data are available for all variables.

Table II-1
Economic and Fiscal "Footprint" in 2016
Auto and Gasoline Related Industries
Kern County Totals

	Direct	Indirect/ Induced (1)	Total Impact
Business Volume	\$2.9 billion	\$1.3 billion	\$4.2 billion
Jobs	6,477	1,833	8,310
Payroll	\$265 million	\$48 million	\$313 million
Fiscal Benefits to County			
Property Tax	\$6.4 million		
Sales Tax	\$29.2 million		
State Gas Tax	\$55.1 million		
Other (2)	<u>\$0.5 million</u>		
Total	\$91.2 million		

(1) Indirect/induced jobs in other industries (based on business-to-business spending of direct industries, and household expenditures of direct industries' employees).

(2) Includes revenue accruing to County Agricultural Commissioner for registration/inspection fees and unclaimed gasoline tax (UGT) from the state.

Sources: The Natelson Dale Group, Inc. (TNDG) based data from IMPLAN and State Board of Equalization (SBOE).

2.2. Baseline Forecast of Economic Footprint in 2040

Even without AB 1745 it is likely that that some reduction in the economic footprint of automobile and gasoline related industries would occur in Kern County by 2040. Based on reasonably foreseeable market trends (which are influenced to some extent by State and Federal policies already in place), per capita consumption of gasoline and gasoline-powered cars is likely to decline significantly (see Chapter 4 for a discussion of these assumptions). However, the decline in *per capita* gasoline consumption (and ownership in gasoline powered vehicles) would be offset to some degree by the substantial population growth projected for Kern County (from about 888,000 residents in 2016 to over 1.2 million residents in 2040). Based on these countervailing forces (declines in per capita consumption versus growth in overall population), TNDG projects that the total economic footprint of these industries in 2040 (in the absence of AB 1745) would be about 94% of 2016 levels (see Table II-2 on the following page):

- Total business activity: \$3.9 billion
- Total employment: 7,800 jobs
- Total payroll: \$313 million
- Total fiscal benefit to County: \$85.6 million

The above numbers represent the total economic and fiscal benefits of that would be “at stake” with the implementation of AB 1745.

The summary numbers presented above are for the County overall. Estimated impacts to each of the County’s incorporated cities are provided in Chapter 3.

Table II-2
Baseline Forecast of Economic and Fiscal "Footprint" in 2040
Auto and Gasoline Related Industries
Kern County Totals

	Direct	Indirect/ Induced (1)	Total Impact
Business Volume	\$2.7 billion	\$1.2 billion	\$3.9 billion
Jobs	6,075	1,719	7,794
Payroll	\$249 million	\$45 million	\$294 million
Fiscal Benefits to County			
Property Tax	\$6.0 million		
Sales Tax	\$27.4 million		
State Gas Tax	\$51.7 million		
Other (2)	<u>\$0.5 million</u>		
Total	\$85.6 million		

(1) Indirect/induced jobs in other industries (based on business-to-business spending of direct industries, and household expenditures of direct industries' employees).

(2) Includes revenue accruing to County Agricultural Commissioner for registration/inspection fees and unclaimed gasoline tax (UGT) from the state.

Sources: The Natelson Dale Group, Inc. (TNDG) based data from IMPLAN and State Board of Equalization (SBOE).

3.0 DETAILED SUMMARY OF ECONOMIC AND FISCAL IMPACTS

This section provides a summary of the economic footprint of the major categories of businesses that would be directly impacted by AB 1745, along with the economic contribution to other industry sectors in the Kern County regional economy. Table III-1 shows a summary of the existing (2016) data while Table III-2 shows a baseline 2040 forecast. Tables III-3 and III-4 provide the same existing and baseline 2040 forecast for the economic contribution of the relevant industries. Following is a summary of the data provided in the tables.

3.1. Employment and Payroll

The relevant industries provide close to 6,500 jobs in the county and generate about \$265 million in total employee compensation⁴. On a per jobs basis, this translates to about \$40,900 per job. In 2040, these industries are projected to account for approximately 6,100 jobs and generate about \$249 million in total employee compensation.

3.2. Total Business Volume

According to data from the California State Board of Equalization (BOE), the relevant industries generate approximately \$2.9 billion in annual sales. Close to one-third (31%) of these sales, or \$920.5 million, are estimated to originate in the unincorporated portion of the county. In 2040, total county sales are projected at approximately \$2.7 billion.

3.3. Fiscal Revenues

Gasoline-related industries currently generate approximately \$91.2 million in annual revenue in the county. As shown in Table II-1, the state gasoline tax accounts for most of these fiscal revenues, about 60% of the total. The remaining 40% is generated by property taxes (7%), local sales taxes (32%), and revenue accruing to the County Agricultural Commissioner (1%). In 2040, total county fiscal revenues associated with these industries are projected at \$85.6 million.

3.4. Economic Contribution

Along with the economic activity directly generated by businesses in the evaluated industry sectors, these businesses contribute additional economic benefits through indirect and induced activity (see Section 3.2 for a definition and of indirect and induced impacts). As shown in Tables III-3 to III-10, economic benefits are measured in terms of industry output (value of industry production), employment, and employee compensation.

Table III-3 shows the existing economic contribution to the county from the Gasoline Stations industry. Accounting for all ranges of economic activity, this industry generates about \$374 million in total industry output, accounts for more than 3,600 jobs, and generates about \$104.3 million total employee

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- ⁴ Employee compensation includes total payroll cost of the employee paid by the employer. This includes wage and salary, all benefits (e.g., health, retirement) and payroll taxes (both sides of social security, unemployment taxes, etc.)

compensation. Table III-4 shows the top 10 industries affected in terms of total employees. Projections for 2040 are provided in Tables III-5 and III-6.

Table III-7 shows the existing economic contribution to the county from the Motor Vehicle and Parts industry. Accounting for all ranges of economic activity, this industry generates close to \$600 million in total industry output, accounts for more than 4,600 jobs, and generates about \$208.8 million total employee compensation. Table III-8 shows the top 10 industries affected in terms of total employees. Projections for 2040 are provided in Tables III-9 and III-10.

3.5. Potential for Urban Decay Impacts

The implementation of AB 1745 would potentially have significant impacts on two business types (automobile dealerships and gasoline stations) that tend to be land intensive. Given the uncertainty regarding the land requirements of future “replacement” businesses/industries (e.g., would ZEV dealerships occupy the same sites and/or the amounts of land as traditional automobile dealerships?), a dramatic transition away from gasoline-oriented businesses could potentially result in significant amounts of vacated land. In an era in which the viability of retail commercial real estate is already challenged by the accelerating encroachment of ecommerce, the prospect of AB 1745 resulting in additional surplus properties is a concern with respect to the potential for blighting or “urban decay” impacts. While it is beyond the scope of this study to quantitatively evaluate the amount of land that would potentially be vacated and the potential timing of market-based reuse of vacated sites, the issue is noted as a potentially significant impact that warrants careful consideration and study as part of the AB 1745 deliberation process.

The potential for vacated gas stations is of particular concern given the complications associated with reusing properties that have abandoned underground storage tanks. Kern County currently has 285 facilities permitted to store gasoline and diesel in underground storage tanks. Currently, four of the 285 permitted facilities are classified as abandoned facilities. According to County staff⁵, these sites tend to remain abandoned until the County is able to secure State assistance in removing them. The potential for many of the 285 existing facilities to close due to AB 1745 raises a significant question as to the availability of resources to address abandoned storage tanks to facilitate timely reuse of vacated properties.

⁵ Kern County Public Health Services Department: Environmental Health Division, Unified Hazardous Materials/Waste Program.

Table III-1

**ECONOMIC AND FISCAL REVENUE SUMMARY - AUTO AND GASOLINE RELATED INDUSTRIES
KERN COUNTY AND CITIES
2016**

INDUSTRY	JOBS	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
ARVIN								
Retail Gasoline Sales	15	\$405,119	\$10,943,106	\$18,928	\$109,431	\$761,500		\$889,859
Auto Sales								
Auto Repair/Auto Parts			\$4,130,097	\$12,715	\$41,301			\$54,016
Motor Vehicle & Parts Dealers*	18	\$858,052						
Total	33	\$1,263,171	\$15,073,203	\$31,642	\$150,732	\$761,500		\$943,874
BAKERSFIELD								
Retail Gasoline Sales	1,276	\$33,980,915	\$396,455,436	\$1,450,294	\$3,964,554	\$13,739,808		\$19,154,657
Auto Sales			\$1,126,753,318	\$1,345,155	\$11,267,533			\$12,612,688
Auto Repair/Auto Parts			\$87,135,190	\$819,794	\$871,352			\$1,691,146
Motor Vehicle & Parts Dealers*	2,851	\$138,599,701						
Total	4,127	\$172,580,616	\$1,610,343,944	\$3,615,243	\$16,103,439	\$13,739,808		\$33,458,491
CALIFORNIA CITY								
Retail Gasoline Sales	13	\$343,738	\$1,098,979	\$11,747	\$10,990	\$526,602		\$549,338
Auto Sales								
Auto Repair/Auto Parts			\$250,533	\$17,436	\$2,505			\$19,941
Motor Vehicle & Parts Dealers*	8	\$388,552						
Total	21	\$732,290	\$1,349,512	\$29,183	\$13,495	\$526,602		\$569,279
DELANO								
Retail Gasoline Sales	121	\$3,228,678	\$43,143,193	\$178,899	\$431,432	\$1,951,331		\$2,561,662
Auto Sales			\$52,218,917	\$4,745	\$522,189			\$526,934
Auto Repair/Auto Parts			\$14,470,201	\$40,620	\$144,702			\$185,322
Motor Vehicle & Parts Dealers*	112	\$5,423,537						
Total	233	\$8,652,215	\$109,832,311	\$224,265	\$1,098,323	\$1,951,331		\$3,273,919
MARICOPA								
Retail Gasoline Sales	6	\$171,869	\$9,810,952	\$11,539	\$98,110	\$48,248		\$157,897
Auto Sales								
Auto Repair/Auto Parts								
Motor Vehicle & Parts Dealers*	6	\$171,869	\$9,810,952	\$11,539	\$98,110	\$48,248		\$157,897
Total	6	\$171,869	\$9,810,952	\$11,539	\$98,110	\$48,248		\$157,897

INDUSTRY	JOBS	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
MCFARLAND								
Retail Gasoline Sales	2	\$61,382	\$5,995,582	\$8,448	\$59,956	\$534,931		\$603,334
Auto Sales								
Auto Repair/Auto Parts			\$1,994,996	\$5,946	\$19,950			\$25,896
Motor Vehicle & Parts Dealers*	11	\$534,259						
Total	13	\$595,641	\$7,990,578	\$14,394	\$79,906	\$534,931		\$629,230
RIDGECREST								
Retail Gasoline Sales	77	\$2,050,149	\$30,786,904	\$59,266	\$307,869	\$1,047,597		\$1,414,732
Auto Sales			\$28,617,272	\$24,657	\$286,173			\$310,830
Auto Repair/Auto Parts			\$9,950,544	\$28,528	\$99,505			\$128,034
Motor Vehicle & Parts Dealers*	112	\$5,423,537						
Total	189	\$7,473,686	\$69,354,720	\$112,452	\$693,547	\$1,047,597		\$1,853,595
SHAFTER								
Retail Gasoline Sales	70	\$1,853,728	\$37,566,654	\$54,062	\$375,667	\$679,837		\$1,109,565
Auto Sales			\$14,624,152	\$1,956	\$146,242			\$148,198
Auto Repair/Auto Parts			\$2,469,699	\$74,309	\$24,697			\$99,006
Motor Vehicle & Parts Dealers*	51	\$2,493,208						
Total	121	\$4,346,936	\$54,660,505	\$130,327	\$546,605	\$679,837		\$1,356,769
TAFT								
Retail Gasoline Sales	31	\$822,515	\$10,459,297	\$34,876	\$104,593	\$352,750		\$492,219
Auto Sales			\$2,603,960	\$10,521	\$26,040			\$36,560
Auto Repair/Auto Parts			\$1,066,769	\$17,917	\$10,668			\$28,585
Motor Vehicle & Parts Dealers*	18	\$858,052						
Total	49	\$1,680,567	\$14,130,026	\$63,314	\$141,300	\$352,750		\$557,365
TEHACAHPI								
Retail Gasoline Sales	84	\$2,246,571	\$75,427,711	\$64,408	\$754,277	\$534,242		\$1,352,927
Auto Sales								
Auto Repair/Auto Parts			\$637,419	\$30,114	\$6,374			\$36,489
Motor Vehicle & Parts Dealers*	21	\$1,019,949						
Total	105	\$3,266,520	\$76,065,130	\$94,522	\$760,651	\$534,242		\$1,389,416
WASCO								
Retail Gasoline Sales	40	\$1,055,766	\$24,423,727	\$69,091	\$244,237	\$979,076		\$1,292,404
Auto Sales			\$960,434	\$5,967	\$9,604			\$15,571
Auto Repair/Auto Parts			\$7,772,354	\$24,094	\$77,724			\$101,818
Motor Vehicle & Parts Dealers*	24	\$1,165,656						
Total	64	\$2,221,421	\$33,156,515	\$99,152	\$331,565	\$979,076		\$1,409,794

INDUSTRY	JOB	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
UNINCORPORATED COUNTY								
Retail Gasoline Sales	929	\$24,724,555	746,343,812	\$1,264,373	7,463,438	\$33,963,982	\$560,095	\$43,251,888
Auto Sales			78,557,982	\$253,765	785,580			\$1,039,345
Auto Repair/Auto Parts			95,562,994	\$428,761	955,630			\$1,384,391
Motor Vehicle & Parts Dealers*	152	\$7,398,690						
Total	1,081	\$32,123,245	\$920,464,789	\$1,946,899	\$9,204,648	\$33,963,982		\$45,675,624
KERN COUNTY TOTAL								
Retail Gasoline Sales	2,664	\$70,944,984	\$1,392,455,353	\$3,225,931	\$13,924,554	\$55,119,904	\$560,095	\$72,830,484
Wholesale Gasoline Sales	436	\$29,908,469						
Auto Sales			\$1,304,336,036	\$1,646,766	\$13,043,360			\$14,690,126
Auto Repair/Auto Parts			\$225,440,796	\$1,500,235	\$2,254,408			\$3,754,643
Motor Vehicle & Parts Dealers*	3,377	\$164,163,193						
Total	6,477	\$265,016,646	\$2,922,232,185	\$6,372,932	\$29,222,322	\$55,119,904		\$91,275,253

Note: *Includes above auto-related categories along with Other Motor Vehicle Dealers (NAICS 4412); Wholesale Gasoline Sales Industry data are not available at sub-county level of geography. State Gas Tax includes projected first full-year values (deflated into 2016 dollars) from the new Road Maintenance and Rehabilitation Account, as specified under SB1. County Agricultural Commission include two sources of revenue: 1) fees for registration/inspection of pumps (\$227,094) and 2) unclaimed gasoline tax (UGT) from the state (\$333,000) .

SOURCE: IMPLAN, California State Board of Equalization (BOE); Quarterly Census of Employment and Wages (QCEW); Kern County Assessor; California City Finance; TNDG.

Table III-2

**PROJECTED ECONOMIC AND FISCAL REVENUE SUMMARY - AUTO AND GASOLINE RELATED INDUSTRIES
KERN COUNTY AND CITIES
2040**

INDUSTRY	JOBS	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
ARVIN								
Retail Gasoline Sales	14	\$379,988	\$10,264,270	\$17,753	\$102,643	\$714,262		\$834,658
Auto Sales								
Auto Repair/Auto Parts			\$3,873,894	\$11,926	\$38,739			\$50,665
Motor Vehicle & Parts Dealers*	17	\$804,824						
Total	31	\$1,184,813	\$14,138,163	\$29,679	\$141,382	\$714,262		\$885,323
BAKERSFIELD								
Retail Gasoline Sales	1,197	\$31,872,969	\$371,862,017	\$1,360,328	\$3,718,620	\$12,887,483		\$17,966,431
Auto Sales			\$1,056,857,149	\$1,261,711	\$10,568,571			\$11,830,282
Auto Repair/Auto Parts			\$81,729,912	\$768,939	\$817,299			\$1,586,239
Motor Vehicle & Parts Dealers*	2,674	\$130,001,911						
Total	3,871	\$161,874,880	\$1,510,449,078	\$3,390,978	\$15,104,491	\$12,887,483		\$31,382,952
CALIFORNIA CITY								
Retail Gasoline Sales	12	\$322,414	\$1,030,806	\$11,018	\$10,308	\$493,935		\$515,261
Auto Sales								
Auto Repair/Auto Parts			\$234,992	\$16,354	\$2,350			\$18,704
Motor Vehicle & Parts Dealers*	8	\$364,449						
Total	20	\$686,863	\$1,265,797	\$27,372	\$12,658	\$493,935		\$533,965
DELANO								
Retail Gasoline Sales	114	\$3,028,393	\$40,466,881	\$167,802	\$404,669	\$1,830,283		\$2,402,754
Auto Sales			\$48,979,608	\$4,451	\$489,796			\$494,247
Auto Repair/Auto Parts			\$13,572,567	\$38,101	\$135,726			\$173,826
Motor Vehicle & Parts Dealers*	105	\$5,087,098						
Total	218	\$8,115,490	\$103,019,056	\$210,353	\$1,030,191	\$1,830,283		\$3,070,827
MARICOPA								
Retail Gasoline Sales	6	\$161,207	\$9,202,347	\$10,823	\$92,023	\$45,255		\$148,102
Auto Sales								
Auto Repair/Auto Parts								
Motor Vehicle & Parts Dealers*	6	\$161,207						
Total	6	\$161,207	\$9,202,347	\$10,823	\$92,023	\$45,255		\$148,102

INDUSTRY	JOBS	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
MCFARLAND								
Retail Gasoline Sales	2	\$57,574	\$5,623,657	\$7,924	\$56,237	\$501,747		\$565,908
Auto Sales								
Auto Repair/Auto Parts			\$1,871,240	\$5,577	\$18,712			\$24,289
Motor Vehicle & Parts Dealers*	10	\$501,117						
Total	12	\$558,691	\$7,494,897	\$13,501	\$74,949	\$501,747		\$590,197
RIDGECREST								
Retail Gasoline Sales	72	\$1,922,972	\$28,877,092	\$55,590	\$288,771	\$982,611		\$1,326,972
Auto Sales			\$26,842,050	\$23,127	\$268,420			\$291,548
Auto Repair/Auto Parts			\$9,333,279	\$26,759	\$93,333			\$120,092
Motor Vehicle & Parts Dealers*	105	\$5,087,098						
Total	177	\$7,010,069	\$65,052,422	\$105,476	\$650,524	\$982,611		\$1,738,611
SHAFTER								
Retail Gasoline Sales	65	\$1,738,735	\$35,236,272	\$50,708	\$352,363	\$637,665		\$1,040,735
Auto Sales			\$13,716,969	\$1,835	\$137,170			\$139,004
Auto Repair/Auto Parts			\$2,316,495	\$69,700	\$23,165			\$92,865
Motor Vehicle & Parts Dealers*	48	\$2,338,546						
Total	113	\$4,077,281	\$51,269,736	\$122,242	\$512,697	\$637,665		\$1,272,604
TAFT								
Retail Gasoline Sales	29	\$771,492	\$9,810,473	\$32,713	\$98,105	\$330,868		\$461,686
Auto Sales			\$2,442,428	\$9,868	\$24,424			\$34,292
Auto Repair/Auto Parts			\$1,000,594	\$16,806	\$10,006			\$26,812
Motor Vehicle & Parts Dealers*	17	\$804,824						
Total	46	\$1,576,316	\$13,253,495	\$59,387	\$132,535	\$330,868		\$522,790
TEHACAHPI								
Retail Gasoline Sales	79	\$2,107,209	\$70,748,685	\$60,412	\$707,487	\$501,101		\$1,269,001
Auto Sales								
Auto Repair/Auto Parts			\$597,878	\$28,246	\$5,979			\$34,225
Motor Vehicle & Parts Dealers*	20	\$956,678						
Total	99	\$3,063,887	\$71,346,563	\$88,659	\$713,466	\$501,101		\$1,303,226
WASCO								
Retail Gasoline Sales	37	\$990,273	\$22,908,644	\$64,805	\$229,086	\$918,341		\$1,212,232
Auto Sales			\$900,855	\$5,597	\$9,009			\$14,605
Auto Repair/Auto Parts			\$7,290,210	\$22,600	\$72,902			\$95,502
Motor Vehicle & Parts Dealers*	22	\$1,093,346						
Total	60	\$2,083,619	\$31,099,709	\$93,001	\$310,997	\$918,341		\$1,322,339

INDUSTRY	JOB	PAYROLL	BUSINESS VOLUME	PROPERTY TAX	SALES TAX	STATE GAS TAX	COUNTY AGRIC. COMMISSION	FISCAL REVENUE TOTAL
UNINCORPORATED COUNTY								
Retail Gasoline Sales	871	\$23,190,811	700,045,681	\$1,264,373	7,000,457	\$31,857,086	\$525,350	\$40,647,266
Auto Sales			73,684,776	\$253,765	736,848			\$990,613
Auto Repair/Auto Parts			89,634,911	\$428,761	896,349			\$1,325,110
Motor Vehicle & Parts Dealers*	142	\$6,939,725						
Total	1,014	\$30,130,536	\$863,365,367	\$1,946,899	\$8,633,654	\$31,857,086		\$42,962,989
KERN COUNTY TOTAL								
Retail Gasoline Sales	2,499	\$66,544,036	\$1,306,076,824	\$3,025,816	\$13,060,768	\$51,700,638	\$525,350	\$68,312,572
Wholesale Gasoline Sales	409	\$28,053,150						
Auto Sales			\$1,223,423,834	\$1,544,612	\$12,234,238			\$13,778,850
Auto Repair/Auto Parts			\$211,455,971	\$1,407,171	\$2,114,560			\$3,521,731
Motor Vehicle & Parts Dealers*	3,167	\$153,979,617						
Total	6,075	\$248,576,802	\$2,740,956,629	\$5,977,598	\$27,409,566	\$51,700,638		\$85,613,153

Note: *Includes above auto-related categories along with Other Motor Vehicle Dealers (NAICS 4412); Wholesale Gasoline Sales Industry data are not available at sub-county level of geography. State Gas Tax includes projected first full-year values (deflated into 2016 dollars) from the new Road Maintenance and Rehabilitation Account, as specified under SB1. County Agricultural Commission include two sources of revenue: 1) fees for registration/inspection of pumps and 2) unclaimed gasoline tax (UGT) from the state.

SOURCE: IMPLAN, California State Board of Equalization (BOE); Quarterly Census of Employment and Wages (QCEW); Kern County Assessor; California City Finance; TNDG.

Table III-3

**ECONOMIC CONTRIBUTION OF GASOLINE STATIONS INDUSTRY
KERN COUNTY
2016**

CONTRIBUTION CATEGORY	DIRECT	INDIRECT	INDUCED	TOTAL
Output	\$245,917,571	\$45,379,260	\$82,743,144	\$374,039,975
Employees	2,658	340	640	3,637
Employee Compensation	\$70,777,807	\$11,834,183	\$21,654,836	\$104,266,826
Compensation/Job	\$26,627	\$34,842	\$33,854	\$28,665

Note: Totals may not sum due to rounding

SOURCE: IMPLAN; TNDG

Table III-4

**GASOLINE STATIONS INDUSTRY - TOP 10 INDUSTRIES AFFECTED
KERN COUNTY
2016**

INDUSTRY	EMPLOYEES	EMPLOYEE COMPENSATION	COMPENSATION/ JOB	OUTPUT
Retail - Gasoline stores	2,664	\$70,945,013	\$26,627	\$246,498,529
Real estate	93	697,972	7,531	15,585,496
Limited-service restaurants	45	848,282	18,888	3,943,571
Full-service restaurants	37	811,721	22,056	1,840,235
Warehousing and storage	36	1,700,852	46,865	3,691,458
Employment services	34	1,129,674	33,272	2,259,007
Services to buildings	34	343,039	10,108	1,045,966
Hospitals	32	2,573,299	79,534	5,298,792
Individual and family services	28	434,917	15,442	814,760
Offices of physicians	28	1,767,754	63,768	3,236,327

Note: Economic contributions include sum of direct, indirect, and induced impacts.

SOURCE: IMPLAN; TNDG

Table III-5

**ECONOMIC CONTRIBUTION OF GASOLINE STATIONS INDUSTRY
KERN COUNTY
2040 PROJECTION**

CONTRIBUTION CATEGORY	DIRECT	INDIRECT	INDUCED	TOTAL
Output	\$230,662,505	\$42,564,237	\$77,610,318	\$350,837,060
Employees	2,493	319	600	3,412
Employee Compensation	\$66,387,229	\$11,100,070	\$20,311,516	\$97,798,816
Compensation/Job	\$26,627	\$34,842	\$33,854	\$28,665

Note: Totals may not sum due to rounding

SOURCE: IMPLAN; TNDG

Table III-6

**GASOLINE STATIONS INDUSTRY - TOP 10 INDUSTRIES AFFECTED
KERN COUNTY
2040 PROJECTION**

INDUSTRY	EMPLOYEES	EMPLOYEE COMPENSATION	COMPENSATION/ JOB	OUTPUT
Retail - Gasoline stores	2,499	\$66,544,063	\$26,627	\$231,207,425
Real estate	87	654,675	7,531	14,618,677
Limited-service restaurants	42	795,660	18,888	3,698,938
Full-service restaurants	35	761,367	22,056	1,726,080
Warehousing and storage	34	1,595,343	46,865	3,462,465
Employment services	32	1,059,597	33,272	2,118,873
Services to buildings	32	321,759	10,108	981,081
Hospitals	30	2,413,669	79,534	4,970,091
Individual and family services	26	407,937	15,442	764,217
Offices of physicians	26	1,658,094	63,768	3,035,567

Note: Totals may not sum due to rounding; economic contributions include sum of direct, indirect, and induced impacts.

SOURCE: IMPLAN; TNDG

Table III-7

**ECONOMIC CONTRIBUTION OF MOTOR VEHICLE AND PARTS DEALERS INDUSTRY
KERN COUNTY
2016**

CONTRIBUTION CATEGORY	DIRECT	INDIRECT	INDUCED	TOTAL
Output	\$428,076,818	\$61,497,492	\$109,637,511	\$599,211,820
Employees	3,359	467	847	4,673
Employee Compensation	\$163,282,451	\$16,716,943	\$28,764,790	\$208,764,184
Compensation/Job	\$48,616	\$35,784	\$33,960	\$44,677

Note: Totals may not sum due to rounding

SOURCE: IMPLAN; TNDG

Table III-8

**MOTOR VEHICLE AND PARTS DEALERS INDUSTRY - TOP 10 INDUSTRIES AFFECTED
KERN COUNTY
2016**

INDUSTRY	EMPLOYEES	EMPLOYEE COMPENSATION	COMPENSATION/ JOB	OUTPUT
Retail - Motor vehicle and parts dealers	3,377	\$164,163,280	\$48,616	\$430,386,083
Real estate	95	716,160	7,531	15,991,613
Limited-service restaurants	61	1,154,866	18,888	5,368,847
Full-service restaurants	51	1,121,398	22,056	2,542,298
Warehousing and storage	48	2,247,927	46,865	4,878,807
Employment services	48	1,583,085	33,272	3,165,691
Services to buildings	44	446,798	10,108	1,362,339
Hospitals	44	3,476,955	79,534	7,159,547
Offices of physicians	37	2,354,016	63,768	4,309,629
Individual and family services	37	568,524	15,442	1,065,056

Note: Economic contributions include sum of direct, indirect, and induced impacts.

SOURCE: IMPLAN; TNDG

Table III-9

**ECONOMIC CONTRIBUTION OF MOTOR VEHICLE AND PARTS DEALERS INDUSTRY
KERN COUNTY
2040 PROJECTION**

CONTRIBUTION CATEGORY	DIRECT	INDIRECT	INDUCED	TOTAL
Output	\$401,521,822	\$57,682,602	\$102,836,340	\$562,040,765
Employees	3,150	438	794	4,383
Employee Compensation	\$153,153,510	\$15,679,937	\$26,980,417	\$195,813,864
Compensation/Job	\$48,616	\$35,784	\$33,960	\$44,677

Note: Totals may not sum due to rounding

SOURCE: IMPLAN; TNDG

Table III-10

**MOTOR VEHICLE AND PARTS DEALERS INDUSTRY - TOP 10 INDUSTRIES AFFECTED
KERN COUNTY
2040 PROJECTION**

INDUSTRY	EMPLOYEES	EMPLOYEE COMPENSATION	COMPENSATION/ JOB	OUTPUT
Retail - Motor vehicle and parts dealers	3,167	\$153,979,698	\$48,616	\$403,687,836
Real estate	89	671,734	7,531	14,999,602
Limited-service restaurants	57	1,083,226	18,888	5,035,800
Full-service restaurants	48	1,051,834	22,056	2,384,591
Warehousing and storage	45	2,108,481	46,865	4,576,159
Employment services	45	1,484,881	33,272	2,969,313
Services to buildings	41	419,081	10,108	1,277,828
Hospitals	41	3,261,268	79,534	6,715,418
Offices of physicians	35	2,207,988	63,768	4,042,289
Individual and family services	35	533,257	15,442	998,987

Note: Economic contributions include sum of direct, indirect, and induced impacts.

SOURCE: IMPLAN; TNDG

4.0 DESCRIPTION OF STUDY METHODOLOGY AND KEY ASSUMPTIONS

This section of the report provides a description of the study methodology and key assumptions.

4.1. Key Assumptions

The following are key assumptions in this analysis.

- As noted in Section 1.4, the indicated impacts of the proposed law should not be interpreted as “net losses.” Some unknowable portion of the “lost” fiscal and economic benefits would potentially be replaced by substitutes to the industries evaluated in this study.
- The economic contribution analysis evaluates the Gasoline Station (NAICS 447) and the Motor Vehicle and Parts Dealer Industries (NAICS 441). These are the most detailed level of industries at which the economic contribution analysis can be completed. In the case of Motor and Vehicle and Parts Dealer industry, the following component industries are included: Automobile Dealers (NAICS 4411), Other Motor Vehicle Dealers (NAICS 4412), and Automotive Parts, Accessories, and Tire Stores (NAICS 4413). AB 1745 potential impacts would likely be limited in the Other Motor Vehicle Dealers industry, as it includes recreational vehicle dealers, motorcycle dealers, and boat dealers. The bill does not directly address these types of other motor vehicles. However, this component industry is a relatively small portion of the overall broader industry group; according to sales data from the BOE, the sales in the Other Motor Vehicle Dealers industry account for about 5% of the total Motor and Vehicle and Parts Dealer industry sales. Thus, this industry group is overwhelmingly represented by the types of businesses likely to be directly impacted by AB 1745.

4.2. Application of IMPLAN Model

The gasoline and auto related industries contribute the following types of economic benefits in the Kern County regional economy.

- Direct Benefits – Direct benefits relate to the businesses operating in the relevant industries (including gasoline stations, auto sales, auto repair, etc.) evaluated in this analysis. They include the number of employees in these industries, employee compensation, the value of industry production, among others.
- Indirect Benefits – Indirect benefits result when local firms in the relevant industries purchase materials, supplies or services from other firms. An example would include increased sales for local businesses operating in the Janitorial Services industry resulting from purchases of these services by local auto dealerships.
- Induced Benefits - Induced benefits relate to the consumption spending of employees of firms operating in the evaluated industries. These would include all the goods and services normally associated with household consumption (e.g., housing, retail purchases, local services, etc.).

The analysis quantifies the above benefits in terms of the following measures:

- Total Industry Output – represents the broadest measure of total economic activity generated by the evaluated industries. It measures the total value of industry production in producer prices⁶.
- Jobs - expressed in this analysis in terms of full-time and part-time employees lasting one year
- Employee Compensation – associated with jobs in the evaluated industries⁷

Economic Contribution Methodology

This analysis used the IMPLAN (Impact Analysis for Planning) to estimate the value of the evaluated industry sectors in the Kern County region. Along with the direct value of these industry sectors, the IMPLAN software also evaluates what industries are being supported (in terms of production levels, employment levels, etc.) by the auto and gasoline related industry sectors. This software is classified as an “Input-Output” (IO) model that computes all of the economic impacts of industries in a user-defined region (in this case, Kern County), including the estimated local expenditures of employees of both industry-direct and supplier firms. The current version of the IMPLAN model divides the economy into 526 sectors that correspond to 4-digit and 5-digit NAICS codes⁸.

4.3. Baseline 2040 Projection of Gasoline-oriented Activities

In order to calculate the amount of economic activity that would potentially be “at stake” under AB 1745, it is necessary to forecast how much – in the absence of new regulatory constraints – the relevant business types would grow (or shrink) in Kern County by 2040 (the year AB 1745 would take effect). This baseline forecast represents the level of industry growth or retraction (for gasoline-oriented businesses) that would occur if current market trends continue without additional regulatory/policy influences. The baseline forecast recognizes that, even without AB 1745, consumer preferences (influenced to some degree by existing government incentives/policies) are likely to result in increased adoption of all-electric vehicles. Based on reasonably foreseeable market trends (which are influenced to some extent by State and Federal policies already in place), per capita consumption of gasoline and gasoline-powered cars is likely to decline significantly. However, the decline in *per capita* gasoline consumption (and ownership in gasoline powered vehicles) would be offset to some degree by the substantial population growth projected for Kern County.

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- ⁶ For manufacturers, this would be sales plus/minus change in inventory. For service sectors, production = sales. For Retail and wholesale trade, output = gross margin and not gross sales (sales receipts less the cost of goods sold).
 - ⁷ Employee compensation includes total payroll cost of the employee paid by the employer. This includes wage and salary, all benefits (e.g., health, retirement) and payroll taxes (both sides of social security, unemployment taxes, etc.)
 - ⁸ As excerpted from the U.S. Census Bureau’s website, the North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The NAICS system is hierarchical in each level of the system provides an aggregation of detail at the next lower level. For example, there are 20 2-digit industry groups that are further subdivided into 99 3-digit industry groups. Further disaggregation continues to the 6-digit level, which includes 1,175 disaggregated industries.

Table IV-1 calculates an indexing factor by which the existing (2016) levels of economic activity generated by the affected industries can be uniformly projected forward to 2040 activity levels. In effect, the table recognizes that the likely net retraction of these industries will be driven by two countervailing trends:

1. Total population in Kern County is projected to grow substantially over the 24-year projection period (from approximately 888,000 residents in 2016 to over 1.2 million residents in 2020)⁹. All else being equal, these additional residents will translate to proportionate increases in the numbers of license drivers, the numbers of vehicles owned/registered, and the amount of gasoline purchased, etc.
2. The market-based shift towards ZEV's (and hybrids and other fuel-efficient vehicles) will result in a reduction in *per capita* gasoline consumption (and overall business activities related to gasoline-powered vehicles).

As calculated on Table IV-1, even though the County's population is projected to increase by nearly 37% by 2040 (theoretically resulting in increased demand for gasoline and gasoline-powered cars), this substantial growth will be more than offset by the projected decrease in demand (on a per person basis) for gasoline-based transportation. All factors considered, The Natelson Dale Group, Inc. (TNDG) projects that by 2040 total gasoline-oriented business activity (and associated employment and fiscal revenue) will decrease by 6.2% compared to 2016 levels (i.e., in absolute terms, total consumption of gasoline and ownership of gasoline-powered cars is projected at 93.8% of 2016 levels), without the implementation of AB 1745. This calculation reflects the following variables (each is detailed on the table):

- Total population growth;
- The percentages of total vehicles that would fall into the following categories: gasoline, hybrid electric vehicles, plug-in electric vehicles, and all-electric vehicles;
- Gasoline consumption factors for each vehicle type (these factors represent the percentage of gasoline consumed compared to a gasoline vehicle);
- These factors result in a total gasoline consumption index of 96.3 in 2016 compared to 90.3 in 2040; if these factors are "normalized" to a base year index of 100, the 2040 index would be 93.8 (i.e., 6.2% below 2016 levels).

4.4. Unanswered Questions

The following bullet points highlight some unanswered questions and caveats to the existing analysis.

- AB 1745 would require all *new* vehicle registrations to be ZEV's in 2040. Thus, it is likely the county would not immediately lose all of the fiscal revenues and economic contributions summarized in Section 2.0. The existing stock of gasoline-powered vehicles – purchased prior to 2040 – would still be eligible for vehicle registrations. Thus, the demand for the goods and

⁹ Per long-range forecasts published by California Department of Finance (DOF).

services provided by the gasoline and auto related industries would be limited by the lifecycle of the existing stock of automobiles prior to 2040.

- There is an inherent uncertainty in projecting long-term market adoption trends. The 2040 projection methodology described above is in part based on existing market adoption rates of ZEV's and other fuel-efficient vehicles. An acceleration of these market trends, above what is projected in this analysis, would reduce the projected 2040 fiscal revenue and economic contribution values associated with the evaluated industries.

Table IV-1

**SUMMARY FORECAST FACTORS - GASOLINE FISCAL AND ECONOMIC ANALYSIS
KERN COUNTY
2016, 2025, AND 2040**

VARIABLE	2016	2025	2030	2040
California State Population	39,312,207	43,326,397	43,939,250	46,804,202
Kern County Population	887,992	996,506	1,068,729	1,214,656
Total vehicle registrations (CA)	25,244,537	27,822,270	28,215,817	30,055,560
FCEV + BEV share	0.60%	1.54%	5.06%	10.0%
PHEV share	1.50%	3.85%	12.66%	20.0%
HEV share	3.00%	6.00%	6.00%	10.0%
Gasoline Consumption Factors				
FCEV/BEV	0%	0%	0%	0%
PHEV	10%	10%	10%	10%
HEV	40%	40%	40%	40%
Gasoline Cars	100%	100%	100%	100%
Population Index	100.0	112.2	120.4	136.8
Vehicle Shares				
FCEV/BEV	0.6	1.7	6.1	13.7
PHEV	1.5	4.3	15.2	27.4
HEV	3.0	6.7	7.2	13.7
Gasoline Cars	94.9	99.4	91.8	82.1
Gasoline Consumption Index				
FCEV/BEV	-	-	-	-
PHEV	0.2	0.4	1.5	2.7
HEV	1.2	2.7	2.9	5.5
Gasoline Cars	94.9	99.4	91.8	82.1
TOTAL	96.3	102.6	96.2	90.3
Normalized to 100:	100.0	106.6	100.0	93.8

Notes: FCEV = Fuel-cell electric vehicles; BEV = Battery electric vehicles; PHEV = Plug-in hybrid electric vehicles; HEV = Hybrid electric vehicles

SOURCE: California Department of Finance (DOF); Alliance of Automobile Manufacturers; TNDG

APPENDIX A:

**PROPERTY TAX GENERATED BY
GASOLINE AND AUTO RELATED INDUSTRIES – KERN COUNTY AND CITIES**

Table A-1

**GASOLINE STATIONS AND AUTO-RELATED INDUSTRIES
NET ASSESSED VALUE & PROPERTY TAX
KERN COUNTY AND CITIES
2017**

BUSINESS TYPE	NET ASSESSED VALUE	GENERAL 1% PROPERTY TAX
ARVIN		
Service Stations	\$40,518	\$405
Service Station MiniMart	1,852,245	18,522
ServStation Mini M Fast Food	0	0
Auto Repair	938,711	9,387
Auto Parts	332,745	3,327
Auto Sales - new	0	0
Auto Sales - used	0	0
TOTAL	\$3,164,219	\$31,642
BAKERSFIELD		
Service Stations	\$17,606,909	\$176,069
Service Station MiniMart	122,737,321	1,227,373
ServStation Mini M Fast Food	4,685,191	46,852
Auto Repair	70,558,601	705,586
Auto Parts	11,420,796	114,208
Auto Sales - new	92,765,782	927,658
Auto Sales - used	41,749,724	417,497
TOTAL	\$361,524,324	\$3,615,243
CALIFORNIA CITY		
Service Stations	\$0	\$0
Service Station MiniMart	1,174,660	11,747
ServStation Mini M Fast Food	0	0
Auto Repair	497,524	4,975
Auto Parts	1,246,069	12,461
Auto Sales - new	0	0
Auto Sales - used	0	0
TOTAL	\$2,918,253	\$29,183

BUSINESS TYPE	NET ASSESSED VALUE	GENERAL 1% PROPERTY TAX
DELANO		
Service Stations	\$3,225,124	\$32,251
Service Station MiniMart	14,664,796	146,648
ServStation Mini M Fast Food	0	0
Auto Repair	2,212,907	22,129
Auto Parts	1,849,133	18,491
Auto Sales - new	0	0
Auto Sales - used	474,520	4,745
TOTAL	\$22,426,480	\$224,265
MARICOPA		
Service Stations	\$0	\$0
Service Station MiniMart	1,153,913	11,539
ServStation Mini M Fast Food	0	0
Auto Repair	0	0
Auto Parts	0	0
Auto Sales - new	0	0
Auto Sales - used	0	0
TOTAL	\$1,153,913	\$11,539
MCFARLAND		
Service Stations	\$95,542	\$955
Service Station MiniMart	749,244	7,492
ServStation Mini M Fast Food	0	0
Auto Repair	446,236	4,462
Auto Parts	148,340	1,483
Auto Sales - new	0	0
Auto Sales - used	144,977	1,450
TOTAL	\$1,584,339	\$15,843
RIDGECREST		
Service Stations	\$621,245	\$6,212
Service Station MiniMart	5,305,396	53,054
ServStation Mini M Fast Food	0	0
Auto Repair	2,852,844	28,528
Auto Parts	0	0
Auto Sales - new	2,254,874	22,549
Auto Sales - used	210,806	2,108
TOTAL	\$11,245,165	\$112,452

BUSINESS TYPE	NET ASSESSED VALUE	GENERAL 1% PROPERTY TAX
SHAFTER		
Service Stations	\$640,429	\$6,404
Service Station MiniMart	3,834,935	38,349
ServStation Mini M Fast Food	930,806	9,308
Auto Repair	6,798,455	67,985
Auto Parts	632,476	6,325
Auto Sales - new	149,678	1,497
Auto Sales - used	45,931	459
TOTAL	\$13,032,710	\$130,327
TAFT		
Service Stations	\$66,567	\$666
Service Station MiniMart	3,421,067	34,211
ServStation Mini M Fast Food	0	0
Auto Repair	1,436,366	14,364
Auto Parts	355,362	3,554
Auto Sales - new	889,568	8,896
Auto Sales - used	162,518	1,625
TOTAL	\$6,331,448	\$63,314
TEHACAHPI		
Service Stations	\$206,125	\$2,061
Service Station MiniMart	6,234,664	62,347
ServStation Mini M Fast Food	0	0
Auto Repair	1,264,733	12,647
Auto Parts	1,746,698	17,467
Auto Sales - new	0	0
Auto Sales - used	0	0
TOTAL	\$9,452,220	\$94,522
WASCO		
Service Stations	\$326,660	\$3,267
Service Station MiniMart	6,582,419	65,824
ServStation Mini M Fast Food	0	0
Auto Repair	1,568,919	15,689
Auto Parts	840,504	8,405
Auto Sales - new	0	0
Auto Sales - used	596,700	5,967
TOTAL	\$9,915,202	\$99,152

BUSINESS TYPE	NET ASSESSED VALUE	GENERAL 1% PROPERTY TAX
UNICORPORATED COUNTY		
Service Stations	\$13,868,851	\$138,689
Service Station MiniMart	105,841,816	1,058,418
ServStation Mini M Fast Food	6,726,636	67,266
Auto Repair	35,706,371	357,064
Auto Parts	7,169,752	71,698
Auto Sales - new	19,689,204	196,892
Auto Sales - used	5,687,290	56,873
TOTAL	\$194,689,920	\$1,946,899
COUNTY TOTAL		
Service Stations	\$36,697,970	\$366,980
Service Station MiniMart	273,552,476	2,735,525
ServStation Mini M Fast Food	12,342,633	123,426
Auto Repair	124,281,667	1,242,817
Auto Parts	25,741,875	257,419
Auto Sales - new	115,749,106	1,157,491
Auto Sales - used	49,072,466	490,725
TOTAL	\$637,438,193	\$6,374,382

SOURCE: Kern County Assessor; TNDG

Table A-2

**GASOLINE STATIONS AND AUTO-RELATED INDUSTRIES
ESTIMATED 1% PROPERTY TAX BREAKDOWN
KERN COUNTY AND CITIES
2017**

FUND	SHARE	SERVICE STATIONS	SERVICE STATIONS MINI MART	SERVICE STATIONS MINI MART FAST FOOD	AUTO REPAIR	AUTO PARTS	AUTO SALES (NEW)	AUTO SALES (USED)	TOTAL
ARVIN									
City General Fund	0.05	\$20	\$926	\$0	\$469	\$166	\$0	\$0	\$1,582
Local School District	0.22	89	4,075	0	2,065	732	0	0	6,961
CO. Fire Fund	0.01	4	185	0	94	33	0	0	316
CO. General Fund	0.16	65	2,964	0	1,502	532	0	0	5,063
Education	0.02	8	370	0	188	67	0	0	633
ERAF	0.13	53	2,408	0	1,220	433	0	0	4,113
Other County - Schools	0.28	113	5,186	0	2,628	932	0	0	8,860
Other	0.13	53	2,408	0	1,220	433	0	0	4,113
TOTAL	1.00	\$405	\$18,522	\$0	\$9,387	\$3,327	\$0	\$0	\$31,642
BAKERSFIELD									
City General Fund	0.20	\$35,214	\$245,475	\$9,370	\$141,117	\$22,842	\$185,532	\$83,499	\$723,049
Local School District	0.14	24,650	171,832	6,559	98,782	15,989	129,872	58,450	506,134
CO. Fire Fund	0.00	0	0	0	0	0	0	0	0
CO. General Fund	0.18	31,692	220,927	8,433	127,005	20,557	166,978	75,150	650,744
Education	0.02	3,521	24,547	937	14,112	2,284	18,553	8,350	72,305
ERAF	0.16	28,171	196,380	7,496	112,894	18,273	148,425	66,800	578,439
Other County - Schools	0.26	45,778	319,117	12,181	183,452	29,694	241,191	108,549	939,963
Other	0.04	7,043	49,095	1,874	28,223	4,568	37,106	16,700	144,610
TOTAL	1.00	\$176,069	\$1,227,373	\$46,852	\$705,586	\$114,208	\$927,658	\$417,497	\$3,615,243
CALIFORNIA CITY									
City General Fund	0.23	\$0	\$2,702	\$0	\$1,144	\$2,866	\$0	\$0	\$6,712
Local School District	0.28	0	3,289	0	1,393	3,489	0	0	8,171
CO. Fire Fund	0.00	0	0	0	0	0	0	0	0
CO. General Fund	0.16	0	1,879	0	796	1,994	0	0	4,669
Education	0.02	0	235	0	100	249	0	0	584
ERAF	0.22	0	2,584	0	1,095	2,741	0	0	6,420
Other County - Schools	0.05	0	587	0	249	623	0	0	1,459
Other	0.04	0	470	0	199	498	0	0	1,167
TOTAL	1.00	\$0	\$11,747	\$0	\$4,975	\$12,461	\$0	\$0	\$29,183

FUND	SHARE	SERVICE STATIONS	SERVICE STATIONS MINI MART	SERVICE STATIONS MINI MART FAST FOOD	AUTO REPAIR	AUTO PARTS	AUTO SALES (NEW)	AUTO SALES (USED)	TOTAL
DELANO									
City General Fund	0.17	\$5,483	\$24,930	\$0	\$3,762	\$3,144	\$0	\$807	\$38,125
Local School District	0.36	11,610	52,793	0	7,966	6,657	0	1,708	80,735
CO. Fire Fund	0.00	0	0	0	0	0	0	0	0
CO. General Fund	0.14	4,515	20,531	0	3,098	2,589	0	664	31,397
Education	0.02	645	2,933	0	443	370	0	95	4,485
ERAF	0.15	4,838	21,997	0	3,319	2,774	0	712	33,640
Other County - Schools	0.06	1,935	8,799	0	1,328	1,109	0	285	13,456
Other	0.10	3,225	14,665	0	2,213	1,849	0	475	22,426
TOTAL	1.00	\$32,251	\$146,648	\$0	\$22,129	\$18,491	\$0	\$4,745	\$224,265
MARICOPA									
City General Fund	0.23	\$0	\$2,654	\$0	\$0	\$0	\$0	\$0	\$2,654
Local School District	0.11	0	1,269	0	0	0	0	0	1,269
CO. Fire Fund	0.12	0	1,385	0	0	0	0	0	1,385
CO. General Fund	0.22	0	2,539	0	0	0	0	0	2,539
Education	0.03	0	346	0	0	0	0	0	346
ERAF	0.20	0	2,308	0	0	0	0	0	2,308
Other County - Schools	0.07	0	808	0	0	0	0	0	808
Other	0.02	0	231	0	0	0	0	0	231
TOTAL	1.00	\$0	\$11,539	\$0	\$0	\$0	\$0	\$0	\$11,539
MCFARLAND									
City General Fund	0.1	\$96	\$749	\$0	\$446	\$148	\$0	\$145	\$1,584
Local School District	0.33	315	2,473	0	1,473	490	0	478	5,228
CO. Fire Fund	0.08	76	599	0	357	119	0	116	1,267
CO. General Fund	0.14	134	1,049	0	625	208	0	203	2,218
Education	0.02	19	150	0	89	30	0	29	317
ERAF	0.16	153	1,199	0	714	237	0	232	2,535
Other County - Schools	0.05	48	375	0	223	74	0	72	792
Other	0.12	115	899	0	535	178	0	174	1,901
TOTAL	1.00	\$955	\$7,492	\$0	\$4,462	\$1,483	\$0	\$1,450	\$15,843
RIDGECREST									
City General Fund	0.06	\$373	\$3,183	\$0	\$1,712	\$0	\$1,353	\$126	\$6,747
Local School District	0.44	2,733	23,344	0	12,553	0	9,921	928	49,479
CO. Fire Fund	0.10	621	5,305	0	2,853	0	2,255	211	11,245
CO. General Fund	0.16	994	8,489	0	4,565	0	3,608	337	17,992
Education	0.02	124	1,061	0	571	0	451	42	2,249
ERAF	0.15	932	7,958	0	4,279	0	3,382	316	16,868
Other County - Schools	0.06	373	3,183	0	1,712	0	1,353	126	6,747
Other	0.01	62	531	0	285	0	225	21	1,125
TOTAL	1.00	\$6,212	\$53,054	\$0	\$28,528	\$0	\$22,549	\$2,108	\$112,452

FUND	SHARE	SERVICE STATIONS	SERVICE STATIONS MINI MART	SERVICE STATIONS MINI MART FAST FOOD	AUTO REPAIR	AUTO PARTS	AUTO SALES (NEW)	AUTO SALES (USED)	TOTAL
SHAFTER									
City General Fund	0.12	\$769	\$4,602	\$1,117	\$8,158	\$759	\$180	\$55	\$15,639
Local School District	0.20	1,281	7,670	1,862	13,597	1,265	299	92	26,065
CO. Fire Fund	0.01	64	383	93	680	63	15	5	1,303
CO. General Fund	0.15	961	5,752	1,396	10,198	949	225	69	19,549
Education	0.02	128	767	186	1,360	126	30	9	2,607
ERAF	0.15	961	5,752	1,396	10,198	949	225	69	19,549
Other County - Schools	0.26	1,665	9,971	2,420	17,676	1,644	389	119	33,885
Other	0.09	576	3,451	838	6,119	569	135	41	11,729
TOTAL	1.00	\$6,404	\$38,349	\$9,308	\$67,985	\$6,325	\$1,497	\$459	\$130,327
TAFT									
City General Fund	0.18	\$120	\$6,158	\$0	\$2,585	\$640	\$1,601	\$293	\$11,397
Local School District	0.08	53	2,737	0	1,149	284	712	130	5,065
CO. Fire Fund	0.00	0	0	0	0	0	0	0	0
CO. General Fund	0.17	113	5,816	0	2,442	604	1,512	276	10,763
Education	0.02	13	684	0	287	71	178	33	1,266
ERAF	0.16	107	5,474	0	2,298	569	1,423	260	10,130
Other County - Schools	0.07	47	2,395	0	1,005	249	623	114	4,432
Other	0.32	213	10,947	0	4,596	1,137	2,847	520	20,261
TOTAL	1.00	\$666	\$34,211	\$0	\$14,364	\$3,554	\$8,896	\$1,625	\$63,314
TEHACAHP									
City General Fund	0.14	\$289	\$8,729	\$0	\$1,771	\$2,445	\$0	\$0	\$13,233
Local School District	0.25	515	15,587	0	3,162	4,367	0	0	23,631
CO. Fire Fund	0.09	186	5,611	0	1,138	1,572	0	0	8,507
CO. General Fund	0.11	227	6,858	0	1,391	1,921	0	0	10,397
Education	0.02	41	1,247	0	253	349	0	0	1,890
ERAF	0.16	330	9,975	0	2,024	2,795	0	0	15,124
Other County - Schools	0.06	124	3,741	0	759	1,048	0	0	5,671
Other	0.17	350	10,599	0	2,150	2,969	0	0	16,069
TOTAL	1.00	\$2,061	\$62,347	\$0	\$12,647	\$17,467	\$0	\$0	\$94,522
WASCO									
City General Fund	0.11	\$359	\$7,241	\$0	\$1,726	\$925	\$0	\$656	\$10,907
Local School District	0.35	1,143	23,038	0	5,491	2,942	0	2,088	34,703
CO. Fire Fund	0.08	261	5,266	0	1,255	672	0	477	7,932
CO. General Fund	0.16	523	10,532	0	2,510	1,345	0	955	15,864
Education	0.02	65	1,316	0	314	168	0	119	1,983
ERAF	0.16	523	10,532	0	2,510	1,345	0	955	15,864
Other County - Schools	0.05	163	3,291	0	784	420	0	298	4,958
Other	0.07	229	4,608	0	1,098	588	0	418	6,941
TOTAL	1.00	\$3,267	\$65,824	\$0	\$15,689	\$8,405	\$0	\$5,967	\$99,152

FUND	SHARE	SERVICE STATIONS	SERVICE STATIONS MINI MART	SERVICE STATIONS MINI MART FAST FOOD	AUTO REPAIR	AUTO PARTS	AUTO SALES (NEW)	AUTO SALES (USED)	TOTAL
UNINCORPORATED COUNTY									
City General Fund	0.00	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Local School District	0.00	0	0	0	0	0	0	0	0
CO. Fire Fund	0.11	15,256	116,426	7,399	39,277	7,887	21,658	6,256	214,159
CO. General Fund	0.20	27,738	211,684	13,453	71,413	14,340	39,378	11,375	389,380
Education	0.02	2,774	21,168	1,345	7,141	1,434	3,938	1,137	38,938
ERAF	0.15	20,803	158,763	10,090	53,560	10,755	29,534	8,531	292,035
Other County - Schools	0.29	40,220	306,941	19,507	103,548	20,792	57,099	16,493	564,601
Other	0.23	31,898	243,436	15,471	82,125	16,490	45,285	13,081	447,787
TOTAL	1.00	\$138,689	\$1,058,418	\$67,266	\$357,064	\$71,698	\$196,892	\$56,873	\$1,946,899
COUNTY TOTAL									
City General Fund	N/A	\$42,721	\$307,348	\$10,487	\$162,891	\$33,934	\$188,665	\$85,582	\$831,629
Local School District	N/A	42,391	308,107	8,421	147,631	36,214	140,805	63,874	747,442
CO. Fire Fund	N/A	16,468	135,161	7,492	45,654	10,346	23,928	7,065	246,115
CO. General Fund	N/A	66,961	499,019	23,283	225,545	45,039	211,701	89,029	1,160,576
Education	N/A	7,340	54,826	2,469	24,856	5,148	23,150	9,814	127,603
ERAF	N/A	56,869	425,330	18,982	194,111	40,870	182,989	77,874	997,025
Other County - Schools	N/A	90,465	664,394	34,109	313,365	56,586	300,655	126,058	1,585,632
Other	N/A	43,764	341,340	18,183	128,764	29,281	85,598	31,429	678,360
TOTAL	N/A	\$366,980	\$2,735,525	\$123,426	\$1,242,817	\$257,419	\$1,157,491	\$490,725	\$6,374,382

SOURCE: Kern County Assessor; Kern County Auditor-Controller; TNDG

APPENDIX B:

ECONOMIC CONTRIBUTION BY INDUSTRY SECTOR IN KERN COUNTY – GASOLINE INDUSTRY

Table B-1

**ECONOMIC CONTRIBUTION OF GASOLINE STATIONS INDUSTRY - INDUSTRY DETAIL
KERN COUNTY
2016**

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Total	245,917,571	45,379,260	82,743,144	374,039,975	2,658	340	640	3,637	70,777,807	11,834,183	21,654,836	104,266,826
Oilseed farming	0	20	57	77	0	0	0	0	0	0	0	0
Grain farming	0	5	348	353	0	0	0	0	0	0	6	6
Vegetable and melon farming	0	3,139	11,168	14,308	0	0	0	0	0	447	1,589	2,036
Fruit farming	0	8,542	25,732	34,274	0	0	0	0	0	1,835	5,527	7,361
Tree nut farming	0	11,555	33,705	45,260	0	0	0	0	0	3,597	10,492	14,089
Greenhouse, nursery, and floriculture production	0	1,225	2,869	4,093	0	0	0	0	0	218	511	729
Tobacco farming	0	0	0	0	0	0	0	0	0	0	0	0
Cotton farming	0	2,580	7,414	9,993	0	0	0	0	0	839	2,412	3,251
Sugarcane and sugar beet farming	0	0	0	0	0	0	0	0	0	0	0	0
All other crop farming	0	960	7,178	8,138	0	0	0	0	0	256	1,910	2,166
Beef cattle ranching and farming, including feedlots and dual-purpose ranching and farming	0	3	11	13	0	0	0	0	0	0	0	0
Dairy cattle and milk production	0	2,607	7,499	10,106	0	0	0	0	0	135	389	524
Poultry and egg production	0	76	367	442	0	0	0	0	0	5	23	28
Animal production, except cattle and poultry and eggs	0	0	16	17	0	0	0	0	0	0	1	1
Forestry, forest products, and timber tract production	0	0	0	0	0	0	0	0	0	0	0	0
Commercial logging	0	0	0	0	0	0	0	0	0	0	0	0
Commercial fishing	0	124	2,318	2,442	0	0	0	0	0	7	123	129
Commercial hunting and trapping	0	0	0	0	0	0	0	0	0	0	0	0
Support activities for agriculture and forestry	0	4,964	19,049	24,013	0	0	0	0	0	3,358	12,889	16,247
Extraction of natural gas and crude petroleum	0	72,980	135,281	208,261	0	0	0	1	0	26,991	50,033	77,024
Extraction of natural gas liquids	0	6,140	11,381	17,521	0	0	0	0	0	89	164	253
Coal mining	0	0	0	0	0	0	0	0	0	0	0	0
Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Gold ore mining	0	202	99	300	0	0	0	0	0	6	3	9
Silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Lead and zinc ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Copper ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Uranium-radium-vanadium ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Other metal ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Stone mining and quarrying	0	2,690	6,563	9,253	0	0	0	0	0	428	1,045	1,473
Sand and gravel mining	0	233	500	732	0	0	0	0	0	28	61	89
Other clay, ceramic, refractory minerals mining	0	20	41	61	0	0	0	0	0	5	10	15
Potash, soda, and borate mineral mining	0	175	953	1,128	0	0	0	0	0	27	149	177
Phosphate rock mining	0	0	0	0	0	0	0	0	0	0	0	0
Other chemical and fertilizer mineral mining	0	0	0	0	0	0	0	0	0	0	0	0
Other nonmetallic minerals	0	55	135	190	0	0	0	0	0	14	35	50
Drilling oil and gas wells	0	124	79	203	0	0	0	0	0	42	27	68
Support activities for oil and gas operations	0	21,221	13,556	34,777	0	0	0	0	0	12,171	7,775	19,946
Metal mining services	0	23	10	34	0	0	0	0	0	8	4	12
Other nonmetallic minerals services	0	14	8	22	0	0	0	0	0	7	4	11
Electric power generation - Hydroelectric	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Fossil fuel	0	84,472	58,269	142,741	0	0	0	0	0	8,168	5,635	13,803
Electric power generation - Nuclear	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Solar	0	1,187	819	2,006	0	0	0	0	0	240	165	405
Electric power generation - Wind	0	21,981	15,163	37,144	0	0	0	0	0	979	676	1,655
Electric power generation - Geothermal	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Biomass	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - All other	0	0	0	0	0	0	0	0	0	0	0	0
Electric power transmission and distribution	0	220,469	152,078	372,547	0	0	0	0	0	19,399	13,381	32,780
Natural gas distribution	0	111,581	208,986	320,566	0	0	0	0	0	29,980	56,150	86,130
Water, sewage and other systems	0	57,318	177,816	235,134	0	0	1	1	0	15,792	48,990	64,781
Construction of new health care structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new manufacturing structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new power and communication structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new educational and vocational structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new highways and streets	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new commercial structures, including farm structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of other new nonresidential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new single-family residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new multifamily residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of other new residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Maintenance and repair construction of nonresidential structures	0	1,105,217	425,646	1,530,863	0	7	3	10	0	311,502	119,967	431,469

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Heating equipment (except warm air furnaces) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Air conditioning, refrigeration, and warm air heating equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial mold manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Special tool, die, jig, and fixture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Cutting tool and machine tool accessory manufacturing	0	7	2	9	0	0	0	0	0	2	0	2
Machine tool manufacturing	0	1	2	3	0	0	0	0	0	0	0	0
Rolling mill and other metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Turbine and turbine generator set units manufacturing	0	2	2	4	0	0	0	0	0	0	0	1
Speed changer, industrial high-speed drive, and gear manufacturing	0	7	3	10	0	0	0	0	0	2	1	2
Mechanical power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other engine equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Pump and pumping equipment manufacturing	0	88	129	217	0	0	0	0	0	13	18	31
Air and gas compressor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Measuring and dispensing pump manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Elevator and moving stairway manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Conveyor and conveying equipment manufacturing	0	1	0	1	0	0	0	0	0	0	0	0
Overhead cranes, hoists, and monorail systems manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial truck, trailer, and stacker manufacturing	0	147	20	167	0	0	0	0	0	15	2	17
Power-driven handtool manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Welding and soldering equipment manufacturing	0	3	2	5	0	0	0	0	0	0	0	0
Packaging machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial process furnace and oven manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fluid power cylinder and actuator manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fluid power pump and motor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Scales, balances, and miscellaneous general purpose machinery manufacturing	0	3	3	6	0	0	0	0	0	1	1	1
Electronic computer manufacturing	0	1	3	3	0	0	0	0	0	0	0	1
Computer storage device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Computer terminals and other computer peripheral equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Telephone apparatus manufacturing	0	49	31	80	0	0	0	0	0	10	6	16
Broadcast and wireless communications equipment manufacturing	0	17	55	71	0	0	0	0	0	5	18	23
Other communications equipment manufacturing	0	41	22	63	0	0	0	0	0	8	4	12
Audio and video equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Bare printed circuit board manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Semiconductor and related device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Capacitor, resistor, coil, transformer, and other inductor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electronic connector manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Printed circuit assembly (electronic assembly) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other electronic component manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electromedical and electrotherapeutic apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Search, detection, and navigation instruments manufacturing	0	1	9	9	0	0	0	0	0	0	3	3
Automatic environmental control manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial process variable instruments manufacturing	0	1	1	2	0	0	0	0	0	0	0	0
Totalizing fluid meter and counting device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electricity and signal testing instruments manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Analytical laboratory instrument manufacturing	0	0	1	1	0	0	0	0	0	0	0	0
Irradiation apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Watch, clock, and other measuring and controlling device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Blank magnetic and optical recording media manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Software and other prerecorded and record reproducing	0	0	0	0	0	0	0	0	0	0	0	0
Electric lamp bulb and part manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Lighting fixture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Small electrical appliance manufacturing	0	1	58	59	0	0	0	0	0	0	8	8
Household cooking appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Household refrigerator and home freezer manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Household laundry equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other major household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Power, distribution, and specialty transformer manufacturing	0	4	2	7	0	0	0	0	0	1	1	2
Motor and generator manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Switchgear and switchboard apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Relay and industrial control manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Storage battery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Primary battery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fiber optic cable manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other communication and energy wire manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Wiring device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Carbon and graphite product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
All other miscellaneous electrical equipment and component manufacturing	0	0	1	1	0	0	0	0	0	0	0	0
Automobile manufacturing	0	2	262	264	0	0	0	0	0	0	12	13
Light truck and utility vehicle manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Heavy duty truck manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle body manufacturing	0	21	51	72	0	0	0	0	0	4	9	12

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION				
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	
Truck trailer manufacturing	0	1	10	10	0	0	0	0	0	0	0	2	2
Motor home manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Travel trailer and camper manufacturing	0	11	166	177	0	0	0	0	0	1	14	15	15
Motor vehicle gasoline engine and engine parts manufacturing	0	22	22	44	0	0	0	0	0	2	2	4	4
Motor vehicle electrical and electronic equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle steering, suspension component (except spring), and brake systems manufacturi	0	27	16	43	0	0	0	0	0	2	1	3	3
Motor vehicle transmission and power train parts manufacturing	0	54	22	76	0	0	0	0	0	6	2	8	8
Motor vehicle seating and interior trim manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle metal stamping	0	0	0	0	0	0	0	0	0	0	0	0	0
Other motor vehicle parts manufacturing	0	53	22	75	0	0	0	0	0	1	1	2	2
Aircraft manufacturing	0	12	142	154	0	0	0	0	0	1	13	14	14
Aircraft engine and engine parts manufacturing	0	1	5	5	0	0	0	0	0	0	0	0	0
Other aircraft parts and auxiliary equipment manufacturing	0	30	264	294	0	0	0	0	0	7	59	66	66
Guided missile and space vehicle manufacturing	0	155	2,019	2,174	0	0	0	0	0	45	585	630	630
Propulsion units and parts for space vehicles and guided missiles manufacturing	0	13	161	173	0	0	0	0	0	4	47	50	50
Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Ship building and repairing	0	0	0	0	0	0	0	0	0	0	0	0	0
Boat building	0	0	0	0	0	0	0	0	0	0	0	0	0
Motorcycle, bicycle, and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Military armored vehicle, tank, and tank component manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
All other transportation equipment manufacturing	0	2	170	172	0	0	0	0	0	0	10	10	10
Wood kitchen cabinet and countertop manufacturing	0	142	567	709	0	0	0	0	0	30	121	152	152
Upholstered household furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Nonupholstered wood household furniture manufacturing	0	1	146	147	0	0	0	0	0	0	25	25	25
Other household nonupholstered furniture manufacturing	0	3	220	222	0	0	0	0	0	0	29	30	30
Institutional furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Wood office furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Custom architectural woodwork and millwork	0	5	4	8	0	0	0	0	0	1	1	2	2
Office furniture, except wood, manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Showcase, partition, shelving, and locker manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Mattress manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Blind and shade manufacturing	0	3	34	37	0	0	0	0	0	0	2	2	2
Surgical and medical instrument manufacturing	0	0	6	6	0	0	0	0	0	0	1	1	1
Surgical appliance and supplies manufacturing	0	38	672	710	0	0	0	0	0	6	106	112	112
Dental equipment and supplies manufacturing	0	0	69	69	0	0	0	0	0	0	16	16	16
Ophthalmic goods manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Dental laboratories	0	0	70	70	0	0	0	0	0	0	32	32	32
Jewelry and silverware manufacturing	0	4	64	69	0	0	0	0	0	0	2	2	2
Sporting and athletic goods manufacturing	0	3	99	102	0	0	0	0	0	0	17	17	17
Doll, toy, and game manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Office supplies (except paper) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Sign manufacturing	0	33,898	4,503	38,401	0	0	0	0	0	8,200	1,089	9,289	9,289
Gasket, packing, and sealing device manufacturing	0	39	32	71	0	0	0	0	0	4	3	7	7
Musical instrument manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Fasteners, buttons, needles, and pins manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Broom, brush, and mop manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Burial casket manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
All other miscellaneous manufacturing	0	171	299	470	0	0	0	0	0	34	59	94	94
Wholesale trade	0	1,772,584	2,653,291	4,425,874	0	8	12	19	0	520,938	779,766	1,300,704	1,300,704
Retail - Motor vehicle and parts dealers	0	116,360	1,457,482	1,573,842	0	1	11	12	0	44,383	555,931	600,315	600,315
Retail - Furniture and home furnishings stores	0	24,648	359,442	384,090	0	0	3	3	0	7,501	109,389	116,890	116,890
Retail - Electronics and appliance stores	0	34,123	202,361	236,484	0	1	3	4	0	24,290	144,050	168,340	168,340
Retail - Building material and garden equipment and supplies stores	0	71,656	963,873	1,035,530	0	1	9	10	0	23,924	321,807	345,731	345,731
Retail - Food and beverage stores	0	11,729	1,817,619	1,829,348	0	0	23	23	0	4,419	684,796	689,216	689,216
Retail - Health and personal care stores	0	74,414	886,699	961,113	0	1	8	9	0	29,811	355,219	385,030	385,030
Retail - Gasoline stores	245,917,571	37,172	543,786	246,498,529	2,658	0	6	2,664	70,777,807	10,699	156,508	70,945,013	70,945,013
Retail - Clothing and clothing accessories stores	0	58,997	978,702	1,037,699	0	1	12	13	0	12,726	211,109	223,835	223,835
Retail - Sporting goods, hobby, musical instrument and book stores	0	18,852	244,868	263,721	0	0	4	5	0	5,553	72,120	77,673	77,673
Retail - General merchandise stores	0	38,745	2,008,928	2,047,673	0	0	25	26	0	14,366	744,864	759,229	759,229
Retail - Miscellaneous store retailers	0	40,031	504,200	544,230	0	1	10	11	0	11,111	139,948	151,059	151,059
Retail - Nonstore retailers	0	34,051	1,296,294	1,330,345	0	0	12	13	0	1,571	59,820	61,391	61,391
Air transportation	0	13,778	56,999	70,777	0	0	0	0	0	508	2,103	2,612	2,612
Rail transportation	0	32,151	68,189	100,340	0	0	0	0	0	12,076	25,612	37,688	37,688
Water transportation	0	1,177	17,264	18,440	0	0	0	0	0	107	1,567	1,674	1,674
Truck transportation	0	1,480,385	1,083,220	2,563,605	0	9	6	15	0	377,018	275,870	652,888	652,888
Transit and ground passenger transportation	0	42,638	284,646	327,283	0	1	5	6	0	3,190	21,295	24,485	24,485
Pipeline transportation	0	17,339	32,942	50,280	0	0	0	0	0	5,545	10,534	16,079	16,079
Scenic and sightseeing transportation and support activities for transportation	0	932,538	264,967	1,197,504	0	4	1	6	0	323,161	91,821	414,983	414,983
Couriers and messengers	0	988,240	188,526	1,176,767	0	9	2	11	0	261,649	49,915	311,564	311,564
Warehousing and storage	0	3,344,837	346,621	3,691,458	0	33	3	36	0	1,541,145	159,707	1,700,852	1,700,852
Newspaper publishers	0	329,903	68,129	398,032	0	3	1	3	0	118,121	24,393	142,514	142,514

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Periodical publishers	0	76,112	25,102	101,214	0	0	0	0	0	11,367	3,749	15,116
Book publishers	0	374	2,557	2,931	0	0	0	0	0	40	271	311
Directory, mailing list, and other publishers	0	14,913	3,921	18,833	0	0	0	0	0	1,933	508	2,441
Greeting card publishing	0	0	0	0	0	0	0	0	0	0	0	0
Software publishers	0	10,083	39,932	50,015	0	0	0	0	0	3,463	13,713	17,175
Motion picture and video industries	0	16,746	17,961	34,708	0	0	0	0	0	2,056	2,205	4,261
Sound recording industries	0	0	0	0	0	0	0	0	0	0	0	0
Radio and television broadcasting	0	1,637,216	239,145	1,876,360	0	7	1	8	0	429,270	62,703	491,973
Cable and other subscription programming	0	1,142,806	211,162	1,353,968	0	1	0	1	0	64,167	11,856	76,023
Wired telecommunications carriers	0	644,708	899,319	1,544,027	0	1	2	3	0	122,096	170,315	292,411
Wireless telecommunications carriers (except satellite)	0	180,631	333,255	513,886	0	0	0	0	0	4,181	7,713	11,894
Satellite, telecommunications resellers, and all other telecommunications	0	9,363	12,800	22,163	0	0	0	0	0	6,993	9,560	16,553
Data processing, hosting, and related services	0	86,273	26,113	112,386	0	0	0	0	0	20,532	6,215	26,747
News syndicates, libraries, archives and all other information services	0	1,619	3,701	5,319	0	0	0	0	0	45	103	149
Internet publishing and broadcasting and web search portals	0	23,716	4,802	28,518	0	0	0	0	0	3,624	734	4,358
Monetary authorities and depository credit intermediation	0	983,496	1,773,796	2,757,293	0	3	6	10	0	217,352	392,007	609,359
Nondepository credit intermediation and related activities	0	396,399	287,543	683,942	0	3	2	5	0	133,482	96,827	230,309
Securities and commodity contracts intermediation and brokerage	0	75,980	121,676	197,656	0	1	2	0	0	44,268	70,891	115,159
Other financial investment activities	0	142,177	989,780	1,131,957	0	1	7	9	0	3,566	24,828	28,395
Insurance carriers	0	848,116	2,307,287	3,155,404	0	2	6	8	0	187,281	509,496	696,777
Insurance agencies, brokerages, and related activities	0	477,234	671,191	1,148,426	0	3	5	8	0	108,759	152,960	261,719
Funds, trusts, and other financial vehicles	0	14,920	1,591,817	1,606,737	0	0	4	4	0	2,160	230,484	232,644
Real estate	0	10,989,765	4,595,731	15,585,496	0	65	27	93	0	492,160	205,813	697,972
Owner-occupied dwellings	0	0	14,613,193	14,613,193	0	0	0	0	0	0	0	0
Automotive equipment rental and leasing	0	53,378	76,851	130,229	0	0	0	1	0	9,506	13,687	23,193
General and consumer goods rental except video tapes and discs	0	44,093	116,087	160,180	0	0	1	2	0	17,620	46,391	64,011
Video tape and disc rental	0	0	6,739	6,739	0	0	0	0	0	0	533	533
Commercial and industrial machinery and equipment rental and leasing	0	305,131	126,132	431,262	0	1	0	1	0	65,248	26,972	92,220
Lessors of nonfinancial intangible assets	0	198,768	31,721	230,489	0	0	0	0	0	659	105	764
Legal services	0	258,093	510,840	768,934	0	2	3	5	0	83,609	165,487	249,096
Accounting, tax preparation, bookkeeping, and payroll services	0	736,375	387,473	1,123,848	0	10	5	15	0	319,115	167,915	487,029
Architectural, engineering, and related services	0	491,645	414,847	906,492	0	3	3	6	0	238,714	201,425	440,139
Specialized design services	0	104,876	43,567	148,443	0	1	0	2	0	37,815	15,709	53,524
Custom computer programming services	0	3,734	1,338	5,072	0	0	0	0	0	1,557	558	2,115
Computer systems design services	0	89,588	34,099	123,687	0	1	0	1	0	65,395	24,891	90,285
Other computer related services, including facilities management	0	133,298	52,194	185,492	0	1	0	1	0	68,857	26,962	95,819
Management consulting services	0	449,016	205,453	654,469	0	5	2	7	0	177,891	81,396	259,288
Environmental and other technical consulting services	0	228,977	102,952	331,929	0	3	1	5	0	128,960	57,983	186,943
Scientific research and development services	0	2,548	33,106	35,654	0	0	0	0	0	914	11,870	12,784
Advertising, public relations, and related services	0	1,012,565	134,439	1,147,004	0	7	1	8	0	139,138	18,474	157,612
Photographic services	0	18,254	51,850	70,104	0	0	1	2	0	3,058	8,687	11,745
Veterinary services	0	83	238,877	238,960	0	0	2	2	0	31	89,809	89,840
Marketing research and all other miscellaneous professional, scientific, and technical services	0	446,916	90,666	537,582	0	7	2	9	0	48,087	9,755	57,843
Management of companies and enterprises	0	2,903,671	829,227	3,732,897	0	14	4	18	0	1,279,097	365,283	1,644,380
Office administrative services	0	273,768	140,888	414,655	0	4	2	5	0	187,945	96,721	284,666
Facilities support services	0	112,980	69,957	182,937	0	1	0	1	0	36,862	22,825	59,686
Employment services	0	1,544,834	714,173	2,259,007	0	23	11	34	0	772,534	357,141	1,129,674
Business support services	0	431,787	122,563	554,350	0	10	3	13	0	220,980	62,725	283,705
Travel arrangement and reservation services	0	33,155	68,966	102,121	0	0	0	1	0	6,299	13,102	19,401
Investigation and security services	0	255,236	129,765	385,001	0	6	3	8	0	151,413	76,981	228,394
Services to buildings	0	558,667	487,299	1,045,966	0	18	16	34	0	183,222	159,816	343,039
Landscape and horticultural services	0	207,535	226,997	434,532	0	5	5	10	0	71,292	77,978	149,270
Other support services	0	271,103	42,602	313,705	0	3	1	4	0	98,760	15,519	114,279
Waste management and remediation services	0	547,205	352,172	899,377	0	2	2	4	0	165,156	106,292	271,448
Elementary and secondary schools	0	0	57,448	57,448	0	0	1	1	0	0	36,672	36,672
Junior colleges, colleges, universities, and professional schools	0	23,787	163,774	187,561	0	0	3	3	0	8,980	61,827	70,807
Other educational services	0	78,761	254,668	333,429	0	2	7	10	0	41,980	135,739	177,719
Offices of physicians	0	0	3,236,327	3,236,327	0	0	0	28	0	0	1,767,754	1,767,754
Offices of dentists	0	0	1,015,279	1,015,279	0	0	0	9	0	0	461,704	461,704
Offices of other health practitioners	0	0	923,716	923,716	0	0	0	12	0	0	342,460	342,460
Outpatient care centers	0	0	1,423,265	1,423,265	0	0	0	8	0	0	622,023	622,023
Medical and diagnostic laboratories	0	16	333,616	333,632	0	0	3	3	0	9	179,446	179,455
Home health care services	0	0	484,558	484,558	0	0	0	9	0	0	303,257	303,257
Other ambulatory health care services	0	379	265,876	266,255	0	0	0	3	0	142	99,274	99,416
Hospitals	0	0	5,298,792	5,298,792	0	0	0	32	0	0	2,573,299	2,573,299
Nursing and community care facilities	0	0	528,542	528,542	0	0	0	8	0	0	274,181	274,181
Residential mental retardation, mental health, substance abuse and other facilities	0	0	207,450	207,450	0	0	0	5	0	0	139,429	139,429
Individual and family services	0	0	814,760	814,760	0	0	0	28	0	0	434,917	434,917
Community food, housing, and other relief services, including rehabilitation services	0	0	393,249	393,249	0	0	0	5	0	0	127,314	127,314
Child day care services	0	0	293,054	293,054	0	0	0	7	0	0	115,416	115,416
Performing arts companies	0	6,000	100,139	106,139	0	0	1	1	0	768	12,816	13,584

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Commercial Sports Except Racing	0	52,361	40,464	92,826	0	1	1	2	0	9,916	7,663	17,579
Racing and Track Operation	0	7	18,654	18,662	0	0	1	1	0	2	5,584	5,587
Promoters of performing arts and sports and agents for public figures	0	47,624	89,594	137,219	0	0	1	1	0	7,309	13,750	21,059
Independent artists, writers, and performers	0	51,280	30,862	82,142	0	2	1	3	0	3,121	1,878	5,000
Museums, historical sites, zoos, and parks	0	0	18,658	18,658	0	0	0	0	0	0	6,725	6,725
Amusement parks and arcades	0	43	5,646	5,688	0	0	0	0	0	17	2,299	2,316
Gambling industries (except casino hotels)	0	174	287,611	287,785	0	0	2	2	0	25	41,755	41,780
Other amusement and recreation industries	0	54,438	156,373	210,811	0	1	3	4	0	22,321	64,117	86,438
Fitness and recreational sports centers	0	21,127	150,154	171,281	0	1	4	4	0	8,368	59,471	67,838
Bowling centers	0	3	14,618	14,621	0	0	0	0	0	1	5,523	5,525
Hotels and motels, including casino hotels	0	54,562	24,442	79,004	0	1	0	1	0	13,834	6,197	20,032
Other accommodations	0	350	257	607	0	0	0	0	0	115	85	200
Full-service restaurants	0	191,053	1,649,182	1,840,235	0	4	33	37	0	84,273	727,448	811,721
Limited-service restaurants	0	263,638	3,679,933	3,943,571	0	3	42	45	0	56,710	791,572	848,282
All other food and drinking places	0	81,927	728,131	810,058	0	2	17	18	0	52,131	463,313	515,443
Automotive repair and maintenance, except car washes	0	334,841	1,362,619	1,697,461	0	3	12	15	0	109,050	443,773	552,824
Car washes	0	23,467	143,740	167,207	0	0	2	3	0	10,785	66,060	76,845
Electronic and precision equipment repair and maintenance	0	161,835	65,525	227,360	0	1	0	1	0	40,139	16,252	56,391
Commercial and industrial machinery and equipment repair and maintenance	0	635,954	160,654	796,607	0	4	1	5	0	222,689	56,255	278,944
Personal and household goods repair and maintenance	0	266,527	265,963	532,490	0	2	2	4	0	29,656	29,593	59,249
Personal care services	0	0	637,361	637,361	0	0	1	1	0	0	42,559	42,559
Death care services	0	0	87,878	87,878	0	0	1	1	0	0	31,148	31,148
Dry-cleaning and laundry services	0	40,759	143,218	183,977	0	1	2	2	0	17,894	62,876	80,770
Other personal services	0	57,367	471,617	528,984	0	1	8	9	0	2,540	20,882	23,422
Religious organizations	0	0	121,593	121,593	0	0	5	5	0	0	186,176	186,176
Grantmaking, giving, and social advocacy organizations	0	291	443,114	443,405	0	0	3	3	0	68	103,061	103,129
Business and professional associations	0	102,901	121,650	224,551	0	1	1	1	0	32,558	38,491	71,049
Labor and civic organizations	0	5,825	305,222	311,047	0	0	4	4	0	1,808	94,715	96,522
Private households	0	0	67,791	67,791	0	0	4	4	0	0	67,791	67,791
Postal service	0	628,499	158,083	786,582	0	7	2	8	0	528,628	132,963	661,591
Federal electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other federal government enterprises	0	41,134	174,263	215,397	0	0	1	1	0	8,463	35,853	44,316
State government passenger transit	0	0	0	0	0	0	0	0	0	0	0	0
State government electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other state government enterprises	0	0	0	0	0	0	0	0	0	0	0	0
Local government passenger transit	0	5,597	37,362	42,959	0	0	1	1	0	11,916	79,549	91,465
Local government electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other local government enterprises	0	550,567	1,041,711	1,592,278	0	2	3	4	0	188,897	357,406	546,302

SOURCE: IMPLAN

APPENDIX C:

ECONOMIC CONTRIBUTION BY INDUSTRY SECTOR IN KERN COUNTY – MOTOR VEHICLE AND PARTS DEALERS

Table C-1

ECONOMIC CONTRIBUTION OF MOTOR VEHICLE AND PARTS DEALERS INDUSTRY - INDUSTRY DETAIL
KERN COUNTY
2016

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Total	428,076,818	61,497,492	109,637,511	599,211,820	3,359	467	847	4,673	163,282,451	16,716,943	28,764,790	208,764,184
Oilseed farming	0	4	73	77	0	0	0	0	0	0	0	0
Grain farming	0	2	466	469	0	0	0	0	0	0	8	8
Vegetable and melon farming	0	571	14,446	15,017	0	0	0	0	0	81	2,055	2,137
Fruit farming	0	1,546	33,043	34,589	0	0	0	0	0	332	7,097	7,429
Tree nut farming	0	2,090	43,214	45,304	0	0	0	0	0	651	13,452	14,102
Greenhouse, nursery, and floriculture production	0	6,584	3,774	10,358	0	0	0	0	0	1,172	672	1,843
Tobacco farming	0	0	0	0	0	0	0	0	0	0	0	0
Cotton farming	0	466	9,498	9,964	0	0	0	0	0	152	3,090	3,241
Sugarcane and sugar beet farming	0	0	0	0	0	0	0	0	0	0	0	0
All other crop farming	0	1,089	9,435	10,525	0	0	0	0	0	290	2,511	2,801
Beef cattle ranching and farming, including feedlots and dual-purpose ranching and farming	0	1	14	15	0	0	0	0	0	0	0	0
Dairy cattle and milk production	0	472	9,607	10,079	0	0	0	0	0	24	498	522
Poultry and egg production	0	14	479	493	0	0	0	0	0	1	31	32
Animal production, except cattle and poultry and eggs	0	0	22	22	0	0	0	0	0	0	2	2
Forestry, forest products, and timber tract production	0	0	0	0	0	0	0	0	0	0	0	0
Commercial logging	0	0	0	0	0	0	0	0	0	0	0	0
Commercial fishing	0	221	3,059	3,280	0	0	1	1	0	12	162	174
Commercial hunting and trapping	0	0	0	0	0	0	0	0	0	0	0	0
Support activities for agriculture and forestry	0	1,518	24,682	26,200	0	0	1	1	0	1,027	16,700	17,727
Extraction of natural gas and crude petroleum	0	154,586	181,550	336,136	0	0	1	1	0	57,172	67,145	124,317
Extraction of natural gas liquids	0	13,006	15,274	28,280	0	0	0	0	0	188	220	408
Coal mining	0	0	0	0	0	0	0	0	0	0	0	0
Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Gold ore mining	0	214	130	345	0	0	0	0	0	6	4	10
Silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Lead and zinc ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Copper ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Uranium-radium-vanadium ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Other metal ore mining	0	0	0	0	0	0	0	0	0	0	0	0
Stone mining and quarrying	0	3,469	8,581	12,049	0	0	0	0	0	552	1,366	1,918
Sand and gravel mining	0	248	654	902	0	0	0	0	0	30	79	110
Other clay, ceramic, refractory minerals mining	0	30	55	85	0	0	0	0	0	7	13	20
Potash, soda, and borate mineral mining	0	220	1,266	1,486	0	0	0	0	0	34	198	233
Phosphate rock mining	0	0	0	0	0	0	0	0	0	0	0	0
Other chemical and fertilizer mineral mining	0	0	0	0	0	0	0	0	0	0	0	0
Other nonmetallic minerals	0	82	178	261	0	0	0	0	0	21	47	68
Drilling oil and gas wells	0	208	105	313	0	0	0	0	0	70	35	105
Support activities for oil and gas operations	0	35,619	18,081	53,700	0	0	0	0	0	20,429	10,370	30,799
Metal mining services	0	36	14	50	0	0	0	0	0	13	5	17
Other nonmetallic minerals services	0	22	11	33	0	0	0	0	0	10	5	16
Electric power generation - Hydroelectric	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Fossil fuel	0	108,674	78,708	187,382	0	0	0	0	0	10,509	7,611	18,120
Electric power generation - Nuclear	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Solar	0	1,527	1,106	2,633	0	0	0	0	0	308	223	531
Electric power generation - Wind	0	28,279	20,481	48,761	0	0	0	0	0	1,260	913	2,173
Electric power generation - Geothermal	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - Biomass	0	0	0	0	0	0	0	0	0	0	0	0
Electric power generation - All other	0	0	0	0	0	0	0	0	0	0	0	0
Electric power transmission and distribution	0	283,634	205,423	489,057	0	0	0	0	0	24,956	18,075	43,031
Natural gas distribution	0	297,093	279,490	576,582	0	0	0	1	0	79,823	75,094	154,917
Water, sewage and other systems	0	95,864	239,450	335,314	0	0	1	1	0	26,411	65,971	92,382
Construction of new health care structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new manufacturing structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new power and communication structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new educational and vocational structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new highways and streets	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new commercial structures, including farm structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of other new nonresidential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new single-family residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of new multifamily residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Construction of other new residential structures	0	0	0	0	0	0	0	0	0	0	0	0
Maintenance and repair construction of nonresidential structures	0	1,514,640	571,121	2,085,761	0	10	4	13	0	426,896	160,969	587,865

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Heating equipment (except warm air furnaces) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Air conditioning, refrigeration, and warm air heating equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial mold manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Special tool, die, jig, and fixture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Cutting tool and machine tool accessory manufacturing	0	22	2	24	0	0	0	0	0	5	1	6
Machine tool manufacturing	0	2	2	4	0	0	0	0	0	0	0	1
Rolling mill and other metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Turbine and turbine generator set units manufacturing	0	3	2	5	0	0	0	0	0	1	0	1
Speed changer, industrial high-speed drive, and gear manufacturing	0	17	4	20	0	0	0	0	0	4	1	5
Mechanical power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other engine equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Pump and pumping equipment manufacturing	0	133	169	301	0	0	0	0	0	19	24	43
Air and gas compressor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Measuring and dispensing pump manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Elevator and moving stairway manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Conveyor and conveying equipment manufacturing	0	1	0	1	0	0	0	0	0	0	0	0
Overhead cranes, hoists, and monorail systems manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial truck, trailer, and stacker manufacturing	0	120	27	147	0	0	0	0	0	12	3	15
Power-driven handtool manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Welding and soldering equipment manufacturing	0	4	3	7	0	0	0	0	0	0	0	0
Packaging machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial process furnace and oven manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fluid power cylinder and actuator manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fluid power pump and motor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Scales, balances, and miscellaneous general purpose machinery manufacturing	0	5	4	9	0	0	0	0	0	1	1	2
Electronic computer manufacturing	0	1	4	5	0	0	0	0	0	0	1	1
Computer storage device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Computer terminals and other computer peripheral equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Telephone apparatus manufacturing	0	46	42	88	0	0	0	0	0	9	8	17
Broadcast and wireless communications equipment manufacturing	0	35	73	108	0	0	0	0	0	11	23	35
Other communications equipment manufacturing	0	57	30	87	0	0	0	0	0	11	6	16
Audio and video equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Bare printed circuit board manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Semiconductor and related device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Capacitor, resistor, coil, transformer, and other inductor manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electronic connector manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Printed circuit assembly (electronic assembly) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other electronic component manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electromedical and electrotherapeutic apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Search, detection, and navigation instruments manufacturing	0	674	11	685	0	0	0	0	0	219	4	222
Automatic environmental control manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Industrial process variable instruments manufacturing	0	43	1	45	0	0	0	0	0	5	0	5
Totalizing fluid meter and counting device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Electricity and signal testing instruments manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Analytical laboratory instrument manufacturing	0	1	1	2	0	0	0	0	0	0	0	0
Irradiation apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Watch, clock, and other measuring and controlling device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Blank magnetic and optical recording media manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Software and other prerecorded and record reproducing	0	0	0	0	0	0	0	0	0	0	0	0
Electric lamp bulb and part manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Lighting fixture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Small electrical appliance manufacturing	0	2	77	79	0	0	0	0	0	0	11	11
Household cooking appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Household refrigerator and home freezer manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Household laundry equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other major household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Power, distribution, and specialty transformer manufacturing	0	4	3	7	0	0	0	0	0	1	1	2
Motor and generator manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Switchgear and switchboard apparatus manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Relay and industrial control manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Storage battery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Primary battery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Fiber optic cable manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Other communication and energy wire manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Wiring device manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Carbon and graphite product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
All other miscellaneous electrical equipment and component manufacturing	0	0	1	1	0	0	0	0	0	0	0	0
Automobile manufacturing	0	8	346	354	0	0	0	0	0	0	16	17
Light truck and utility vehicle manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Heavy duty truck manufacturing	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle body manufacturing	0	26	68	94	0	0	0	0	0	5	12	16

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION				
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	
Truck trailer manufacturing	0	1	13	14	0	0	0	0	0	0	0	2	2
Motor home manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Travel trailer and camper manufacturing	0	15	217	232	0	0	0	0	0	1	18	19	19
Motor vehicle gasoline engine and engine parts manufacturing	0	62	30	92	0	0	0	0	0	6	3	9	9
Motor vehicle electrical and electronic equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle steering, suspension component (except spring), and brake systems manufacturi	0	72	21	93	0	0	0	0	0	4	1	6	6
Motor vehicle transmission and power train parts manufacturing	0	166	29	195	0	0	0	0	0	18	3	21	21
Motor vehicle seating and interior trim manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Motor vehicle metal stamping	0	0	0	0	0	0	0	0	0	0	0	0	0
Other motor vehicle parts manufacturing	0	202	30	232	0	0	0	0	0	5	1	6	6
Aircraft manufacturing	0	11	191	202	0	0	0	0	0	1	18	19	19
Aircraft engine and engine parts manufacturing	0	1	6	7	0	0	0	0	0	0	1	1	1
Other aircraft parts and auxiliary equipment manufacturing	0	31	356	387	0	0	0	0	0	7	79	86	86
Guided missile and space vehicle manufacturing	0	116	2,715	2,831	0	0	0	0	0	34	786	820	820
Propulsion units and parts for space vehicles and guided missiles manufacturing	0	11	216	227	0	0	0	0	0	3	63	66	66
Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Ship building and repairing	0	0	0	0	0	0	0	0	0	0	0	0	0
Boat building	0	0	0	0	0	0	0	0	0	0	0	0	0
Motorcycle, bicycle, and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Military armored vehicle, tank, and tank component manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
All other transportation equipment manufacturing	0	3	219	222	0	0	0	0	0	0	13	13	13
Wood kitchen cabinet and countertop manufacturing	0	550	739	1,290	0	0	0	0	0	118	158	276	276
Upholstered household furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Nonupholstered wood household furniture manufacturing	0	2	189	191	0	0	0	0	0	0	32	33	33
Other household nonupholstered furniture manufacturing	0	5	285	290	0	0	0	0	0	1	38	39	39
Institutional furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Wood office furniture manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Custom architectural woodwork and millwork	0	9	5	13	0	0	0	0	0	2	1	3	3
Office furniture, except wood, manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Showcase, partition, shelving, and locker manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Mattress manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Blind and shade manufacturing	0	2	44	46	0	0	0	0	0	0	2	2	2
Surgical and medical instrument manufacturing	0	0	8	8	0	0	0	0	0	0	2	2	2
Surgical appliance and supplies manufacturing	0	61	899	960	0	0	0	0	0	10	141	151	151
Dental equipment and supplies manufacturing	0	0	93	93	0	0	0	0	0	0	21	21	21
Ophthalmic goods manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Dental laboratories	0	0	95	95	0	0	0	0	0	0	43	43	43
Jewelry and silverware manufacturing	0	48	77	125	0	0	0	0	0	2	3	4	4
Sporting and athletic goods manufacturing	0	9	127	136	0	0	0	0	0	2	22	23	23
Doll, toy, and game manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Office supplies (except paper) manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Sign manufacturing	0	58,138	5,967	64,104	0	1	0	1	0	14,063	1,443	15,506	15,506
Gasket, packing, and sealing device manufacturing	0	45	42	86	0	0	0	0	0	4	4	8	8
Musical instrument manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Fasteners, buttons, needles, and pins manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Broom, brush, and mop manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
Burial casket manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0
All other miscellaneous manufacturing	0	180	391	572	0	0	0	0	0	36	78	114	114
Wholesale trade	0	2,175,931	3,524,798	5,700,729	0	9	15	25	0	639,476	1,035,890	1,675,366	1,675,366
Retail - Motor vehicle and parts dealers	428,076,818	379,975	1,929,290	430,386,083	3,359	3	15	3,377	163,282,451	144,935	735,894	164,163,280	164,163,280
Retail - Furniture and home furnishings stores	0	122,167	475,546	597,713	0	1	4	5	0	37,179	144,723	181,902	181,902
Retail - Electronics and appliance stores	0	169,982	267,552	437,534	0	3	4	7	0	121,001	190,456	311,457	311,457
Retail - Building material and garden equipment and supplies stores	0	354,295	1,275,165	1,629,460	0	3	12	16	0	118,288	425,738	544,026	544,026
Retail - Food and beverage stores	0	23,640	2,405,686	2,429,326	0	0	31	31	0	8,907	906,353	915,260	915,260
Retail - Health and personal care stores	0	370,587	1,172,986	1,543,572	0	3	11	14	0	148,460	469,908	618,367	618,367
Retail - Gasoline stores	0	183,937	719,432	903,369	0	2	8	10	0	52,939	207,060	260,000	260,000
Retail - Clothing and clothing accessories stores	0	293,283	1,294,899	1,588,182	0	4	16	19	0	63,262	279,313	342,575	342,575
Retail - Sporting goods, hobby, musical instrument and book stores	0	93,603	323,944	417,547	0	2	6	7	0	27,569	95,410	122,979	122,979
Retail - General merchandise stores	0	68,545	2,658,792	2,727,337	0	1	34	34	0	25,415	985,818	1,011,233	1,011,233
Retail - Miscellaneous store retailers	0	198,793	667,016	865,809	0	4	14	18	0	55,178	185,140	240,317	240,317
Retail - Nonstore retailers	0	169,022	1,715,462	1,884,484	0	2	16	18	0	7,800	79,163	86,963	86,963
Air transportation	0	22,768	73,203	95,972	0	0	0	0	0	840	2,701	3,542	3,542
Rail transportation	0	46,217	90,076	136,293	0	0	0	0	0	17,359	33,833	51,193	51,193
Water transportation	0	3,327	22,483	25,810	0	0	0	0	0	302	2,041	2,343	2,343
Truck transportation	0	2,596,241	1,425,795	4,022,036	0	15	8	23	0	661,199	363,115	1,024,315	1,024,315
Transit and ground passenger transportation	0	66,132	368,793	434,925	0	1	7	8	0	4,948	27,591	32,538	32,538
Pipeline transportation	0	37,090	44,207	81,297	0	0	0	0	0	11,861	14,137	25,998	25,998
Scenic and sightseeing transportation and support activities for transportation	0	1,467,937	350,649	1,818,586	0	7	2	8	0	508,699	121,514	630,212	630,212
Couriers and messengers	0	1,323,371	249,442	1,572,814	0	13	2	15	0	350,379	66,043	416,422	416,422
Warehousing and storage	0	4,419,958	458,849	4,878,807	0	43	5	48	0	2,036,511	211,416	2,247,927	2,247,927
Newspaper publishers	0	550,772	90,360	641,132	0	5	1	5	0	197,202	32,353	229,555	229,555

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Periodical publishers	0	124,605	33,296	157,901	0	1	0	1	0	18,610	4,973	23,582
Book publishers	0	648	3,390	4,038	0	0	0	0	0	69	360	429
Directory, mailing list, and other publishers	0	25,182	5,201	30,383	0	0	0	0	0	3,264	674	3,938
Greeting card publishing	0	0	0	0	0	0	0	0	0	0	0	0
Software publishers	0	17,264	52,419	69,683	0	0	0	0	0	5,928	18,001	23,929
Motion picture and video industries	0	29,737	23,653	53,390	0	0	0	0	0	3,651	2,904	6,555
Sound recording industries	0	0	0	0	0	0	0	0	0	0	0	0
Radio and television broadcasting	0	2,808,684	317,455	3,126,139	0	12	1	13	0	736,424	83,235	819,659
Cable and other subscription programming	0	1,969,306	281,596	2,250,902	0	2	0	2	0	110,573	15,811	126,384
Wired telecommunications carriers	0	1,247,317	1,216,597	2,463,914	0	3	3	5	0	236,220	230,402	466,621
Wireless telecommunications carriers (except satellite)	0	320,094	450,487	770,581	0	0	0	0	0	7,409	10,426	17,835
Satellite, telecommunications resellers, and all other telecommunications	0	16,628	17,313	33,941	0	0	0	0	0	12,419	12,931	25,350
Data processing, hosting, and related services	0	169,525	34,829	204,354	0	1	0	1	0	40,345	8,289	48,634
News syndicates, libraries, archives and all other information services	0	3,116	4,843	7,959	0	0	0	0	0	87	135	222
Internet publishing and broadcasting and web search portals	0	41,119	6,360	47,479	0	0	0	0	0	6,283	972	7,255
Monetary authorities and depository credit intermediation	0	1,114,910	2,384,600	3,499,510	0	4	8	12	0	246,394	526,994	773,388
Nondepository credit intermediation and related activities	0	723,189	380,488	1,103,677	0	5	3	8	0	243,525	128,124	371,649
Securities and commodity contracts intermediation and brokerage	0	121,832	164,125	285,957	0	1	2	3	0	70,982	95,623	166,605
Other financial investment activities	0	213,459	1,340,413	1,553,872	0	2	10	12	0	5,355	33,624	38,979
Insurance carriers	0	2,224,852	3,056,264	5,281,116	0	5	8	13	0	491,292	674,885	1,166,177
Insurance agencies, brokerages, and related activities	0	868,311	889,946	1,758,256	0	6	7	13	0	197,882	202,813	400,695
Funds, trusts, and other financial vehicles	0	29,294	2,162,005	2,191,299	0	0	6	6	0	4,242	313,043	317,285
Real estate	0	9,772,897	6,218,716	15,991,613	0	58	37	95	0	437,664	278,496	716,160
Owner-occupied dwellings	0	0	18,994,999	18,994,999	0	0	0	0	0	0	0	0
Automotive equipment rental and leasing	0	77,786	100,796	178,582	0	0	0	1	0	13,853	17,951	31,804
General and consumer goods rental except video tapes and discs	0	68,612	154,678	223,290	0	1	2	3	0	27,419	61,813	89,232
Video tape and disc rental	0	0	8,994	8,994	0	0	0	0	0	0	711	711
Commercial and industrial machinery and equipment rental and leasing	0	502,668	167,171	669,838	0	2	1	2	0	107,489	35,747	143,237
Lessors of nonfinancial intangible assets	0	127,433	42,034	169,467	0	0	0	0	0	422	139	562
Legal services	0	361,050	657,070	1,018,119	0	2	4	7	0	116,962	212,858	329,819
Accounting, tax preparation, bookkeeping, and payroll services	0	1,649,552	507,207	2,156,758	0	21	7	28	0	714,848	219,802	934,650
Architectural, engineering, and related services	0	786,409	547,566	1,333,975	0	5	3	8	0	381,834	265,866	647,700
Specialized design services	0	133,150	56,660	189,810	0	2	1	2	0	48,010	20,430	68,440
Custom computer programming services	0	7,113	1,775	8,888	0	0	0	0	0	2,966	740	3,706
Computer systems design services	0	175,421	45,222	220,642	0	2	0	2	0	128,048	33,010	161,058
Other computer related services, including facilities management	0	253,563	69,160	322,723	0	2	1	3	0	130,981	35,726	166,707
Management consulting services	0	675,306	273,768	949,074	0	7	3	10	0	267,543	108,462	376,004
Environmental and other technical consulting services	0	277,636	137,169	414,805	0	4	2	6	0	156,365	77,254	233,618
Scientific research and development services	0	1,896	44,540	46,437	0	0	0	0	0	680	15,970	16,650
Advertising, public relations, and related services	0	1,737,035	178,161	1,915,196	0	13	1	14	0	238,689	24,481	263,170
Photographic services	0	28,615	68,463	97,078	0	1	2	2	0	4,794	11,470	16,265
Veterinary services	0	88	318,366	318,454	0	0	3	3	0	33	119,694	119,727
Marketing research and all other miscellaneous professional, scientific, and technical services	0	362,631	120,675	483,305	0	6	2	8	0	39,018	12,984	52,003
Management of companies and enterprises	0	882,757	1,100,752	1,983,509	0	4	5	10	0	388,863	484,893	873,756
Office administrative services	0	470,662	187,956	658,618	0	6	2	9	0	323,115	129,034	452,149
Facilities support services	0	178,803	92,831	271,634	0	1	0	1	0	58,337	30,288	88,625
Employment services	0	2,213,402	952,290	3,165,691	0	33	14	48	0	1,106,868	476,217	1,583,085
Business support services	0	627,710	161,553	789,263	0	15	4	18	0	321,250	82,680	403,929
Travel arrangement and reservation services	0	86,461	83,372	169,833	0	1	1	1	0	16,426	15,839	32,264
Investigation and security services	0	347,127	171,225	518,352	0	8	4	11	0	205,926	101,576	307,502
Services to buildings	0	722,699	639,640	1,362,339	0	23	21	44	0	237,019	209,779	446,798
Landscape and horticultural services	0	266,373	297,492	563,865	0	6	7	14	0	91,504	102,194	193,699
Other support services	0	348,884	56,444	405,328	0	4	1	5	0	127,095	20,562	147,657
Waste management and remediation services	0	1,190,294	470,734	1,661,029	0	5	2	7	0	359,252	142,076	501,328
Elementary and secondary schools	0	0	71,285	71,285	0	0	2	2	0	0	45,505	45,505
Junior colleges, colleges, universities, and professional schools	0	1,636	208,554	210,190	0	0	3	3	0	618	78,732	79,349
Other educational services	0	14,451	321,715	336,166	0	0	9	10	0	7,703	171,475	179,178
Offices of physicians	0	0	4,309,629	4,309,629	0	0	0	37	0	0	2,354,016	2,354,016
Offices of dentists	0	0	1,361,617	1,361,617	0	0	12	12	0	0	619,203	619,203
Offices of other health practitioners	0	0	1,211,337	1,211,337	0	0	16	16	0	0	449,093	449,093
Outpatient care centers	0	0	1,888,383	1,888,383	0	0	10	10	0	0	825,298	825,298
Medical and diagnostic laboratories	0	21	444,368	444,389	0	0	4	4	0	11	239,018	239,018
Home health care services	0	0	617,284	617,284	0	0	12	12	0	0	386,323	386,323
Other ambulatory health care services	0	589	353,439	354,028	0	0	4	4	0	220	131,969	132,189
Hospitals	0	0	7,159,547	7,159,547	0	0	44	44	0	0	3,476,955	3,476,955
Nursing and community care facilities	0	0	721,765	721,765	0	0	11	11	0	0	374,416	374,416
Residential mental retardation, mental health, substance abuse and other facilities	0	0	276,111	276,111	0	0	7	7	0	0	185,576	185,576
Individual and family services	0	0	1,065,056	1,065,056	0	0	37	37	0	0	568,524	568,524
Community food, housing, and other relief services, including rehabilitation services	0	0	517,245	517,245	0	0	6	6	0	0	167,458	167,458
Child day care services	0	0	374,122	374,122	0	0	9	9	0	0	147,343	147,343
Performing arts companies	0	7,496	127,040	134,536	0	0	1	1	0	959	16,259	17,219

INDUSTRY	OUTPUT				EMPLOYEES				EMPLOYEE COMPENSATION			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Commercial Sports Except Racing	0	89,861	51,665	141,527	0	2	1	3	0	17,018	9,784	26,802
Racing and Track Operation	0	4	23,541	23,545	0	0	1	1	0	1	7,047	7,049
Promoters of performing arts and sports and agents for public figures	0	163,116	114,521	277,637	0	1	1	2	0	25,034	17,576	42,609
Independent artists, writers, and performers	0	96,094	40,324	136,418	0	4	2	6	0	5,849	2,454	8,303
Museums, historical sites, zoos, and parks	0	0	24,776	24,776	0	0	0	0	0	0	8,929	8,929
Amusement parks and arcades	0	32	7,264	7,296	0	0	0	0	0	13	2,957	2,970
Gambling industries (except casino hotels)	0	223	391,005	391,228	0	0	3	3	0	32	56,766	56,798
Other amusement and recreation industries	0	9,822	200,334	210,156	0	0	3	4	0	4,027	82,142	86,170
Fitness and recreational sports centers	0	7,786	192,345	200,132	0	0	5	5	0	3,084	76,181	79,265
Bowling centers	0	1	18,551	18,552	0	0	0	0	0	1	7,010	7,010
Hotels and motels, including casino hotels	0	48,533	32,918	81,451	0	1	0	1	0	12,306	8,347	20,652
Other accommodations	0	300	337	637	0	0	0	0	0	99	111	209
Full-service restaurants	0	360,383	2,181,915	2,542,298	0	7	44	51	0	158,964	962,434	1,121,398
Limited-service restaurants	0	502,031	4,866,816	5,368,847	0	6	55	61	0	107,989	1,046,876	1,154,866
All other food and drinking places	0	73,253	962,766	1,036,019	0	2	22	24	0	46,611	612,612	659,223
Automotive repair and maintenance, except car washes	0	531,114	1,827,324	2,358,438	0	5	16	20	0	172,971	595,117	768,088
Car washes	0	37,678	192,797	230,475	0	1	3	4	0	17,316	88,605	105,922
Electronic and precision equipment repair and maintenance	0	294,102	87,539	381,641	0	2	1	2	0	72,944	21,712	94,656
Commercial and industrial machinery and equipment repair and maintenance	0	1,019,273	213,869	1,233,142	0	6	1	7	0	356,913	74,889	431,803
Personal and household goods repair and maintenance	0	447,495	350,553	798,048	0	3	2	5	0	49,791	39,005	88,796
Personal care services	0	0	845,708	845,708	0	0	14	14	0	0	56,472	56,472
Death care services	0	0	120,850	120,850	0	0	1	1	0	0	42,835	42,835
Dry-cleaning and laundry services	0	199,204	187,279	386,483	0	2	2	5	0	87,455	82,219	169,674
Other personal services	0	127,246	624,141	751,387	0	2	10	13	0	5,634	27,635	33,269
Religious organizations	0	0	162,937	162,937	0	0	6	6	0	0	249,480	249,480
Grantmaking, giving, and social advocacy organizations	0	313	593,173	593,486	0	0	5	5	0	73	137,963	138,036
Business and professional associations	0	106,007	160,174	266,182	0	1	1	1	0	33,541	50,680	84,221
Labor and civic organizations	0	9,985	400,708	410,692	0	0	6	6	0	3,098	124,345	127,444
Private households	0	0	88,125	88,125	0	0	5	5	0	0	88,125	88,125
Postal service	0	857,135	210,445	1,067,580	0	9	2	11	0	720,932	177,004	897,936
Federal electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other federal government enterprises	0	79,448	231,173	310,621	0	0	1	2	0	16,346	47,562	63,908
State government passenger transit	0	0	0	0	0	0	0	0	0	0	0	0
State government electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other state government enterprises	0	0	0	0	0	0	0	0	0	0	0	0
Local government passenger transit	0	8,680	48,407	57,088	0	0	2	2	0	18,482	103,066	121,548
Local government electric utilities	0	0	0	0	0	0	0	0	0	0	0	0
Other local government enterprises	0	706,628	1,404,446	2,111,074	0	2	4	6	0	242,440	481,858	724,298

SOURCE: IMPLAN

APPENDIX D:
STUDY RESOURCES

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