COUNTY OF VENTURA
MARKET AND ECONOMIC IMPACT ANALYSIS REPORT

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SUBMITTED BY:

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Contents

Introduction

This document provides the following background information for the County of Ventura's Economic Vitality Strategic Plan:

- A demographic and employment profile of Ventura County, with comparisons among communities and neighboring counties in some cases.
- Estimates of the effects of County government on the overall economy of Ventura County.
- Economic vitality strategic planning conditions in Ventura County.
- Highlights of a companion document prepared by The Natelson Dale Group, Inc. (TNDG), the *Industry Cluster Study*.

Much of the material in this document is in the form of appendices, providing supplemental information for each of the topics listed above.

Demographic and Employment Profile

The data elements included in the Demographic and Economic Profile report (previously as a separate document) are listed below, and Tables 2 through 12 (along with relevant Figures) from that Profile (some in modified form) are attached to this document as Appendix A. Most data elements include comparisons of Ventura County with five surrounding counties (Los Angeles County, Orange County, Riverside County, San Bernardino County, and Santa Barbara County), and the State of California. Where available, data are also provided for the cities and Census Designated Places located in Ventura County. Table 1 from the Profile, below, summarizes several of these demographic topics in Ventura County, with comparison geographies.

Population Characteristics (also in the following Demographic and Employment Summary table)

- Population
- Population Growth
- Jobs
- Jobs Growth
- Projected Population
- Population Compound Annual Growth
- Population by Race/Ethnicity
- Population 25 Years and Older by Educational Attainment
- Median Household Income
- Per Capita Income

Employment

- Total Employment
- Labor Force Participation Rates
- Commuting Patterns
- Worker Inflow and Outflow
- Employment by Industry Comparisons
- Location Quotients

- Projected employment growth
- Employment Compound Annual Growth

Other Economic Conditions

- Residential Building Permits
- Non-residential Real Estate Conditions
- Market Vacancy Rates
- Tourism Statistics
- Sales Taxes

Table 1: Demographic and Employment Summary

	Population (2014)	Population Growth (2005-2014)	Total Jobs	Jobs Growth (2005-2014)	Median HH Income	Per Capita Income
State of California	38,567,459	7.5%	15,614,666	10.0%	$61,489	$29,906
Counties						
Ventura County	846,705	6.4%	303,594	1.4%	$77,335	$33,308
Los Angeles County	10,093,053	2.8%	4,371,549	9.6%	$55,870	$27,987
Orange County	3,127,403	5.8%	1,532,325	1.9%	$75,998	$34,416
Riverside County	2,291,093	20.9%	625,982	9.8%	$56,592	$23,660
San Bernardino County	2,100,700	9.3%	655,115	9.6%	$54,100	$21,384
Santa Barbara County	438,612	6.6%	176,868	7.1%	$63,409	$30,526
Cities						
Camarillo	68,424	11.2%	31,895	-8.2%	$87,120	$39,689
Fillmore	15,342	4.7%	2,425	9.3%	$54,519	$19,205
Moorpark	35,552	4.7%	10,628	-8.6%	$99,353	$37,016
Ojai	7,467	-3.1%	3,437	-12.1%	$60,714	$35,231
Oxnard	202,955	9.1%	58,943	8.4%	$62,349	$20,651
Port Hueneme	22,226	-0.4%	3,533	-7.8%	$52,826	$22,352
Ventura	107,980	4.5%	52,750	-0.9%	$66,485	$33,180
Santa Paula	30,632	7.0%	6,004	-2.0%	$53,692	$20,303
Simi Valley	126,862	6.6%	36,034	-4.4%	$89,595	$37,279
Thousand Oaks	131,558	6.0%	63,619	0.6%	$99,115	$46,231
Census Designated Places						
Bell Canyon	2,289	N/A	184	19.5%	$208,508	$81,271
Casa Conejo	3,699	N/A	134	18.6%	$89,432	$28,694
Channel Islands Beach	2,778	N/A	441	89.3%	$90,521	$53,956
El Rio	6,785	N/A	2,137	-16.2%	$59,179	$17,696
Lake Sherwood	1,526	N/A	283	-18.4%	$230,000	$120,676
Meiners Oak	3,634	N/A	481	21.5%	$70,430	$29,168
Mira Monte	7,306	N/A	795	64.9%	$70,905	$39,022
Oak Park	14,512	N/A	994	22.1%	$117,326	$57,470
Oak View	4,347	N/A	414	11.9%	$72,137	$32,723
Piru	2,078	N/A	385	2164.7%	$46,601	$17,001
Santa Rosa Valley	3,422	N/A	311	-40.4%	$162,639	$67,083
Santa Susana	989	N/A	100	6.4%	$87,386	$35,603
Saticoy	1,212	N/A	1,062	-3.5%	$35,926	$11,926

Sources: Department of Finance, E-5 City/County Population and Housing Estimates, 1/1/2016, E-8 City/County/State Population and Housing Estimates, 4/1/2000 to 4/1/2010; On the Map, Work Area Profiles 2005-2014; American Community Survey, 2014 5-Year Estimates, Data Profiles; TNDG.

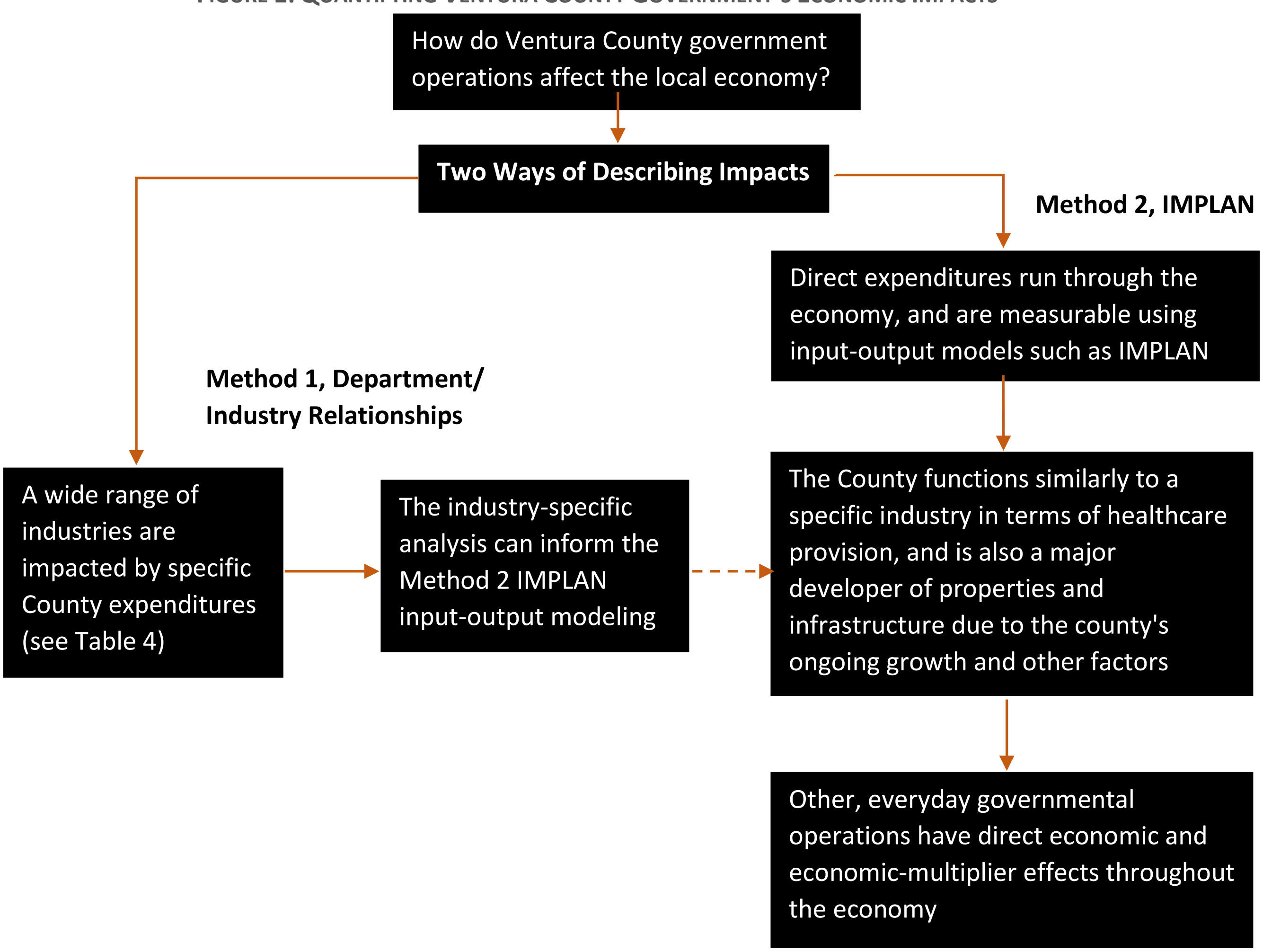
Estimates of County Effects on the Economy

The County of Ventura, as a government entity, has a major influence on the local economy, in part due to various regulatory effects, but probably more significantly in terms of governmental expenditures. This is especially true of Ventura County because of its commitment to serving as a major healthcare provider, and also because the County government builds and operates buildings and infrastructure in a dynamic region. To better capture the full range of the County government's influence on the local economy, TNDG approached this assessment through several means:

- Participating in an open discussion of these effects with County department heads.
- Examining the County budget to identify direct spending relationships to County business categories.
- Recognizing that some effects of County actions on the economy are primarily a matter of influencing how business is conducted, rather than a result of expenditures.

TNDG ultimately adopted two distinct, complementary ways of quantifying and otherwise documenting these effects, illustrated in Figure 1, below.

FIGURE 1. QUANTIFYING VENTURA COUNTY GOVERNMENT'S ECONOMIC IMPACTS



Note that the two processes outlined above are complementary, providing different perspectives on the economic impacts, and not additive. **Method 2 is ultimately a complete accounting of the impacts**, with Method 1 identifying some of the more obvious relationships that would be expected to occur at the individual-industry level, and also providing a basis to help refine the Method 2 analysis. A summary of Method 1 results, by industry categories applied within the analysis, is shown on Table 2 below. Detailed results are shown on Table 3.

TABLE 2. METHOD 1 SUMMARY: ESTIMATED COUNTY DIRECT SPENDING BY INDUSTRY CATEGORIES

NAICS Code	Industry	Direct Spending	Other Influence[1]
111	Crop Production		X
112	Animal Production and Aquaculture		X
113	Forestry and Logging		X
115	Support Activities for Agriculture and Forestry		X
2362	Nonresidential Building Construction	$43,697,433	X
2371	Utility System Construction	$101,124,610	
2372	Land Subdivision		X
2373	Highway, Street, and Bridge Construction	$41,624,963	
2379	Other Heavy and Civil Engineering Construction	$21,860,885	
238	Specialty Trade Contractors	$174,128,097	
3391	Medical Equipment and Supplies Manufacturing	$7,860,172	
4412	Other Motor Vehicle Dealers		X
4812	Nonscheduled Air Transportation		X
5171	Wired Telecommunications Carriers	$16,121,046	X
523	Credit Intermediation and Related Activities	$22,751,902	
524	Insurance Carriers and Related Activities	$46,373,680	
531	Real Estate (Rental/ Leasing, Brokerage, etc.)	$12,453,771	X
5322	Consumer Goods Rental		X
5413	Architectural, Engineering, and Related Services	$24,746,162	X
5419	Other Professional, Scientific, and Technical Services		X
5617	Services to Buildings and Dwellings	$5,253,890	
5621	Waste Collection	$605,630	
621	Ambulatory Health Care Services	$67,530,470	X
6221	General Medical and Surgical Hospitals	$371,781,700	X
6222	Psychiatric and Substance Abuse Hospitals	$125,102,027	X
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	$579,176	X
6233	Continuing Care Retirement Communities & Assisted Living Fac.		
6241	Individual and Family Services	$93,832,594	X
6242	Community Food and Housing, Emergency and Other Relief Svcs.		X
6243	Vocational Rehabilitation Services		X
721	Accommodation		X
722	Food Services and Drinking Places		X
8129	Legal Services		X

1. Industries that would be noticeably affected by Ventura County government departmental actions primarily through *influence* rather than expenditures.

Source: Table 3

Conclusions of this chapter

- The County of Ventura has a total annual budget of approximately $2.4 billion, which includes a direct County payroll of approximately $1.3 billion. The County has a total of 8,980 full-time employees.[1]
- In addition to being a major employer, additional benefits to the local economy are generated by County expenditures that directly affect industries in the local economy, primarily related to construction and healthcare. These "high impact" expenditures are estimated to be $1.2 billion, for the budget year analyzed (FY2016-17 Preliminary Budget).
- The County's impacts are further extended via "multiplier effects" in the local economy, based on the "indirect" and "induced" expenditures of firms and households that are affected by the County's direct expenditures.
- In total, TNDG estimates that the County's activities support almost 21,000 jobs in Ventura County (including the County's staff). These jobs generate a combined local payroll of $1.6 billion per year. (Some of these are construction jobs, which would vary year-to-year with capital spending.)
- The 21,000 jobs directly or indirectly generated by County expenditures represent approximately 6% of all existing (2015, from Chmura Economics) jobs in the local (Ventura County) economy.
- In dollar terms, the County's operations directly or indirectly support $3 billion per year in total economic activity (output) in Ventura County.

Analytical procedures

Method 1 – Matrix of County Department Spending by Industry. At the level of inquiry practical for TNDG's exercise, published budget information was used rather than an exhaustive inventory of detailed line-item expenditures. Also, industry categories tied to expenditures were limited to the set of 305 four-digit NAICS categories (in some cases three-digit categories were used where it was more practical to do so). With this approach, the intent was to capture the most obvious major expenditure/industry relationships, and those that were most likely to be linked to local businesses and employment. Because data in the budget included information about employees and their salaries and benefits associated with each departmental program, as well as overall expenditures and revenues, employee information could be used as a way to estimate the difference between total budget amounts and funds potentially available for outside purchases/contracting.

Method 2 – IMPLAN. The IMPLAN model[2] was used to extend the estimates of direct payments into the secondary effects of County expenditures. Secondary effects consist of indirect effects, generally representing payments to businesses that support a primary activity, and induced effects, representing

[1] Source is County of Ventura FY 2016-17 Preliminary Budget.

[2] IMPLAN is a proprietary integrated economic data modeling system (https://implan.com) that incorporates custom-tailored economic data for counties and other regions in the US, and an analysis program tailored to those data. The system is widely used throughout the US to measure changes in local economies, typically due to some particular event such as a business expansion or a public works project.

expenditures by employee households supported by the expenditures. Specifically, the IMPLAN model was used in three different ways in this analysis:

1. There are two methods in IMPLAN by which to analyze the effects of local government (noneducational) spending: a) Assign a level of spending to the IMPLAN category of "other local government enterprises," which captures government activity other than that associated with general administration; b) Analyze the effects on the local economy from government administrative-activity payrolls, using the IMPLAN category set up for that purpose. Both methods were used in this study, modified according to the following descriptions.
2. The medical portion of the budget, as a nontypical governmental activity, was extracted and analyzed as a separate activity, using two IMPLAN categories representatives of medical industries. A similar approach was applied to the County expenditures estimated to occur within the construction industries, as these are not represented within the (IMPLAN) catchall category of "other local government enterprises." Because the direct spending in medical and construction related activities are already estimated within the matrix of departments and industries, described above, IMPLAN was used to estimate the secondary effects. In this regard, *total* IMPLAN results should be considered as an alternative way of viewing County expenditure impacts, and are not in addition to the "high impact" effects described in the Department/Industry matrix.
3. Payroll amounts were isolated and analyzed separately according to option "b" above (except that the entire medical (HSA) budget was extracted as stated above, including payrolls).

On the Department/Industry (D/I) matrix, Table 3, County departments are listed in the first column and a group of affected industries is shown in succeeding columns. Industries that would be noticeably affected by departmental actions, and primarily through *influence* rather than expenditures, are shown with an "I" in the cell corresponding to the department and industry. Estimates of potential County expenditures that would apply to an industry are shown in the corresponding department/industry cell. In some cases, the departmental name is repeated so that both direct-dollar effects and indirect influences can be shown. In these cases, the first line for the agency shows the direct-dollar effects and the second line (with the agency's name *italicized*) shows the indirect *influences* associated with the agency. Dollar amounts are summed across all the industries, for the relevant departments. The bottom rows of the matrix sum the entries in the rows above. Additional rows show estimates of the total dollar amount associated with production of the commodities that closely match the industries listed in the top row. This estimate allows an additional calculation of the percent of the total production amounts represented by the estimated County expenditures (for the budget year analyzed).

The Table 3 matrix accounts for $1.2 billion in County Government spending, out of a total of $2.2 billion, for the budget year (FY2016-17 Preliminary Budget).

Table 3. Ventura County Department/Industry Matrix

	Cells with dollar values show budget line items of funds that *could* be applied to the listed industries, factored downward based on dollars allocated to salaries (2)																
NAICS	111	112	113	115	2362	2371	2372	2373	2379	238	3391	4412	4812	5171	523	524	531
Departments/ Industries	Crop Produc-tion	Animal Produc-tion and Aqua-culture	Forestry and Logging	Support Activities for Agrc., Forestry	Nonresi-dential Bldg. Constr.	Utility System Construction	Land Sub-division	Highway, Street, and Bridge Construction	Other Heavy and Civil Engineering Construction	Specialty Trade Contractors	Medical Equipment and Supplies Manuf.	Other Motor Vehicle Dealers	Nonsched-uled Air Transpor-tation	Wired Telecom-munications Carriers	Credit Intermed-iation and Related Activities	Insurance Carriers and Related Activities	Real estate (rental/ leasing, brokerage, etc.)
Agency on Aging																	
Agricultural Commissioner	I	I	I	I													
Airports						$797,676		$648,112	$216,037				I				
Animal Services																	
Assessor																	I
Auditor-Controller																	
CEO																$46,373,680	
CEO (Debt Service) (4)															$6,068,113		$5,531,271
Clerk-Recorder																	I
District Attorney																	
District Attorney (Debt Service) (4)					$630,212					$2,370,797							
Fire					$4,056,965					$15,261,915							
Fire (Debt Service) (4)					$167,192					$628,959							
Fire					I												
GSA					$5,097,023	$18,362,958				$28,961,031							
GSA (Debt Service) (4)					$1,001,560				$35,942	$3,767,773					$16,595		
Harbor department					$591,364	$443,523		$369,603	$110,881	$2,180,655		I					
Harbor department (Debt Service) (4)															$113,500		
Health Care Agency																	
Health Care Agency (Debt Service) (4)					$17,867,435					$67,215,588	$7,860,172				$15,864,900		$6,922,500
Health Care agency																	
Human services agency																	
Human services agency																	
Information Technology Services														$16,121,046			
Information Technology Svcs. (Debt Svc) (4)															$236,000		
Library					$148,709					$559,428							
Probation Agency																	
Public Defender																	
Public Works agency					$8,816,308	$80,873,521		$40,607,248	$21,498,025	$33,166,113							
Public Works agency (Debt Service) (4)						$485,973									$339,721		
Resource management agency					I		I										
Sheriff					$5,147,750					$19,365,347				I			
Sheriff (Debt Service) (4)					$172,916	$160,957				$650,493					$113,073		
Treasurer																	
No. of dept. $ interactions with industry	0	0	0	0	11	6	0	3	4	11	1	0	0	1	7	1	2
Number with indirect influence	1	1	1	1	2	0	1	0	0	0	0	1	1	1	0	0	2
Sum of County potential direct $ spending					$43,697,433	$101,124,610		$41,624,963	$21,860,885	$174,128,097	$7,860,172	$0	$0	$16,121,046	$22,751,902	$46,373,680	$12,453,771
Overall total industry production in V.C. (1)					$553,905,823	$700,618,994		$387,148,895	(3)	(3)	$93,000,000			$788,546,779	$1,485,527,957	$880,418,571	$4,523,011,325
Direct County $ as % of total production					7.89%	14.43%		10.75%			8.45%			2.04%	1.53%	5.27%	0.28%

TABLE 3, CONT'D.

	Cells with dollar values show budget line items of funds that *could* be applied to the listed industries, factored downward based on dollars allocated to salaries (2)																
NAICS	5322	5413	5419	5617	5621	621	6221	6222	6232	6233	6241	6242	6243	721	722	8129	
Departments/ Industries	Consumer Goods Rental	Architec-tural, Engineering, and Related Services	Other Professional, Scientific, and Tech. Services	Services to Buildings and Dwellings	Waste Collection	Ambulatory Health Care Services	General Medical and Surgical Hospitals	Psychiatric and Substance Abuse Hospitals	Residential Dev. Disability, Mental Health Facilities	Continuing Care/ Assisted Living Facilities	Individual and Family Services	Community Food and Housing, and Emergency etc. Services	Vocational Rehabilita-tion Services	Accom-modation	Food Services and Drinking Places	Legal Services	Column Totals
Agency on Aging									I	I							$0
Agricultural Commissioner																	$0
Airports		$106,074															$1,767,900
Animal Services			I														$0
Assessor																	$0
Auditor-Controller																	$0
CEO																	$46,373,680
CEO (Debt Service) (4)																	$11,599,384
Clerk-Recorder																	$0
District Attorney																I	$0
District Attorney (Debt Service) (4)		$191,554															$3,192,562
Fire		$1,233,120															$20,552,000
Fire (Debt Service) (4)		$50,818															$846,968
Fire		I															$0
GSA		$3,681,377		$5,253,890										I	I		$61,356,279
GSA (Debt Service) (4)		$306,720															$5,128,589
Harbor department	I	$235,916												I	I		$3,931,941
Harbor department (Debt Service) (4)																	$113,500
Health Care Agency						$67,530,470	$371,781,700	$125,102,027	$579,176								$564,993,373
Health Care Agency (Debt Service) (4)		$5,430,831															$121,161,426
Health Care agency						I	I	I	I		I						$0
Human services agency											$93,832,594						$93,832,594
Human services agency											I	I	I				$0
Information Technology Services																	$16,121,046
Information Technology Svcs. (Debt Svc) (4)																	$236,000
Library		$45,200															$753,337
Probation Agency											I	I	I			I	$0
Public Defender																I	$0
Public Works agency		$11,806,035			$605,630												$197,372,880
Public Works agency (Debt Service) (4)		$31,020															$856,714
Resource management agency				I											I		$0
Sheriff		$1,564,666														I	$26,077,763
Sheriff (Debt Service) (4)		$62,832															$1,160,271
Treasurer																	$0
No. of dept. $ interactions with industry	0	13	0	1	1	1	1	1	1	0	1	0	0	0	0	0	
Number with indirect influence	1	1	1	1	0	1	1	1	1	0	3	2	2	2	3	4	
Sum of County potential direct $ spending	$0	$24,746,162	$0	$5,253,890	$605,630	$67,530,470	$371,781,700	$125,102,027	$579,176	$0	$93,832,594	$0	$0	$0	$0	$0	$1,177,428,208
Overall total industry production in V.C. (1)		$603,388,428		$203,022,019	$210,314,604	$2,033,530,537	(3)	(3)	$33,624,702		$273,486,089						$12,769,544,724
Direct County $ as % of total production		4.10%		2.59%	0.29%	3.32%			1.72%		34.31%						9.22%

NOTES 1. As estimated using comparable IMPLAN categories, where available.
2. Even with adjustments, values shown are likely to overstate the dollars actually committed to the associated industries.
3. Data not distinguishable using available source.
I = Department activities influence industry indirectly.
Expenditures are allocated among mutually affected industries based on proportion of employment in V.C. for that industry (within the relevant group), and according to some industry standard (e.g. for architectural/engineering services). Table sources: Ventura County Budget, TNDG.

The results of the various assignments and allocations of expenditures to the IMPLAN model, as described above, are shown on Table 4.

Table 4. Allocations of the budget to various analytical categories for use in IMPLAN

Line	Analytical categories	Amounts	Allocation to IMPLAN categories (by name and number) of:	
1	Total budget (1)	$2,158,566,339		
2	Medical portion, all	$680,530,302	Hospital (482), @:	Out-patient (478), @:
			88%	12%
			$598,873,706	$81,664,596
3	Net of medical (line 1 minus line 2)	$1,478,028,037		
4	Est. of construction direct	$382,435,987	Constr., non-res (58)	Constr., streets (56)
			$340,811,024	$41,624,963
5	Net of med and constr direct (line 3 minus line 4)	$1,095,592,050		
6	Salaries, non-med	$867,473,910	Employment/ payroll of local government (noneducation) (533)	
7	Net of preceding (5 minus 6)	$228,118,140	Other local government enterprises (526)	
8	**Total amounts input to IMPLAN (lines 2, 4, 6, and 7)**	**$2,158,566,339**		

1. Source is County of Ventura FY 2016-17 Preliminary Budget, Exhibit 10.

Source: TNDG from Ventura County budget data.

The results of the IMPLAN analysis are shown on Table 5 and Table 6, which summarize the results of the various processes applied to the model, as described above. The figures indicate an overall multiplier effect from the estimated County direct spending and the other County operations of 0.6. A description of the IMPLAN terminology as shown in Table 5 is provided in Table 7.

Table 5. Results of the IMPLAN analysis

Impact Type	Employment	Labor Income	Value Added[3]	Output[4]
Direct Effect	13,009	$1,221,168,104	$1,374,691,207	$1,855,065,146
Indirect Effect	2,113	$109,546,084	$179,827,980	$310,640,770
Induced Effect	5,620	$255,872,862	$484,224,653	$795,942,719
Total Effect	20,741	$1,586,587,051	$2,038,743,840	$2,961,648,636

Source: TNDG IMPLAN analysis.

Table 6 shows the top 20 economic sectors in terms of Output (as labeled within IMPLAN) based on the level of secondary effects (the sum of indirect and induced effects), due to County Government

[3] Value added = gross output (sales or other operating income) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). See Table 7 for more detailed explanation.

[4] Output = the value of industry production. For service sectors, production = sales. For Retail and wholesale trade, output = gross margin and not gross sales. See Table 7 for more detailed explanation.

operations. A list that includes all sectors with secondary effects of $1 million or more is provided in Appendix B.

TABLE 6. TOP 20 IMPLAN ECONOMIC SECTORS BASED ON (AND SORTED BY) THE LEVEL OF TOTAL SECONDARY OUTPUT EFFECTS

IMPLAN Sector	Description	Indirect	Induced	Total Secondary
441	Owner-occupied dwellings	$0	$120,998,114	$120,998,114
440	Real estate	$31,474,570	$59,040,026	$90,514,596
395	Wholesale trade	$31,104,505	$40,096,969	$71,201,474
433	Monetary authorities and depository credit intermediation	$11,258,143	$29,703,762	$40,961,905
437	Insurance carriers	$13,419,644	$23,036,414	$36,456,058
482	Hospitals	$279,483	$33,616,145	$33,895,628
502	Limited-service restaurants	$1,717,142	$28,988,004	$30,705,146
475	Offices of physicians	$0	$28,022,738	$28,022,738
62	Maintenance and repair construction of nonresidential structures	$22,680,952	$5,309,267	$27,990,219
436	Other financial investment activities	$10,459,731	$16,195,349	$26,655,080
428	Wireless telecommunications carriers (except satellite)	$3,611,245	$16,375,363	$19,986,608
438	Insurance agencies, brokerages, and related activities	$7,393,726	$12,453,808	$19,847,534
449	Architectural, engineering, and related services	$15,643,482	$3,662,040	$19,305,522
464	Employment services	$12,342,517	$6,835,510	$19,178,027
501	Full-service restaurants	$2,764,023	$15,541,060	$18,305,083
407	Retail - Nonstore retailers	$8,264,200	$7,526,015	$15,790,215
400	Retail - Food and beverage stores	$410,166	$14,418,734	$14,828,900
405	Retail - General merchandise stores	$1,936,595	$12,873,089	$14,809,684
427	Wired telecommunications carriers	$2,600,878	$11,057,685	$13,658,563
447	Legal services	$5,010,275	$8,466,419	$13,476,694

1. Accounted for in Department-Industry matrix.

Source: TNDG IMPLAN analysis.

TABLE 7. DESCRIPTION OF IMPLAN TERMINOLOGY

Impact Type		*Employ-ment*	*Labor Income*	*Total Value Added*	*Output*
	Meaning of values generated for shaded area	Number of employees	All forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.	Gross output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). Includes compensation of employees, taxes on production and imports less subsidies, and gross operating surplus.	The value of industry production. In IMPLAN these are annual production estimates for the year of the data set. 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.
Direct Effect	A series of (or single) production changes or expenditures made by producers / consumers as a result of an activity or policy.				
Indirect Effect	The impact of local industries buying goods and services from other local industries.			[See results in Table 5]	
Induced Effect	The response by an economy to an initial change (direct effect) that occurs through re-spending of income received by a component of value added. This money is re-circulated through the household spending patterns causing further local economic activity.				
Total Effect	Sum of preceding rows				

County Budget Comparisons

TNDG compiled budget data for the following counties, along with Ventura County, in order to generate general comparisons of revenue and expenditure patterns with Ventura County:

Contra Costa
Monterey
San Joaquin
Santa Barbara

A number of challenges are inherent in this type of analysis, including the following:

- Counties do not follow a standardized pattern of departmental organization, or of the assignment of programs to departments; and
- Counties may report full budget details by departmental programs, or follow some other method.

For this analysis, TNDG reassigned departments, programs, and associated budget amounts for the other four counties so that they align as closely as possible, based on our internal judgment, with the departmental/programmatic structure of Ventura County (and part of this process involved reconfiguring/combining some Ventura County departments). While an exhaustive treatment of these kinds of comparisons is beyond the scope of this assignment, the intent of the analysis is to provide a "summary level" budget comparison at the departmental level.

The county comparisons also include a simple method of sensitizing the counties' budget figures to certain demographic conditions within the counties.

Conclusions of this chapter

The approach taken by TNDG to visually compare departmental budgets to some extent highlights the difficulty of making these comparisons, and it could be said that few clear patterns emerge from initial attempts to do this. However, the following general conclusions can be made:

- When reviewing portions of budgets that relate to "charges for services," Ventura appears to be stronger than the other counties in the percent of appropriations attributable to such charges.
- One aspect of the comparison involved focusing on the overall portion of each County's budget derived from "non-tax/non-local" revenue sources. For this process, TNDG considered two major categories of revenues: Charges for Services and Intergovernmental Revenue (local, state and federal subventions). For Ventura County, total revenue from these sources is estimated at 74.7% of total appropriations (excluding appropriations of fixed-asset capital improvements). This ratio is the second highest (i.e., the second most favorable) among the counties evaluated, and is very close to the ratio for the "highest" county. Among the counties evaluated, San Joaquin funds the highest percentage (75.5%) of its appropriations through "non-tax/non-local" revenue sources. For the other evaluated counties, the ratio ranges from 61.9% to 71.0% (see Table 9 below).

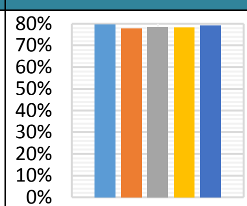
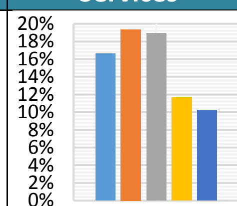
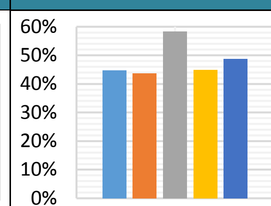
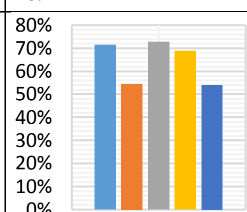
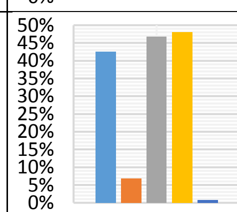
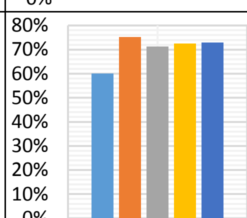
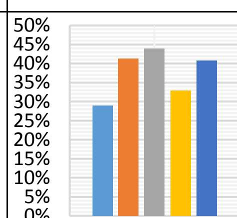
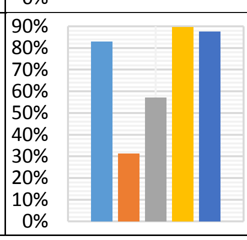
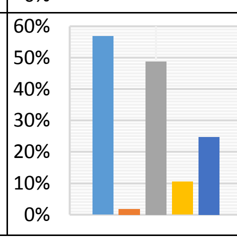
- Contra Costa's total appropriations per capita are the highest of the five counties; San Joaquin County, the County with the most social stress by our measures, is the lowest.
- As might be expected given its relatively high social burdens, San Joaquin County ranks first among the five comparison counties in percent of budget allocated to the following socially oriented departments: Child Support Services and Human/Social Services.

Analytical procedures

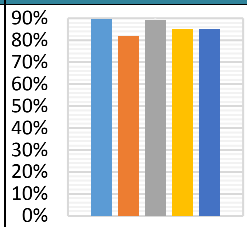
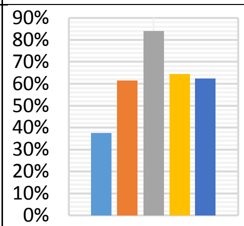
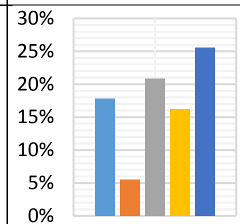
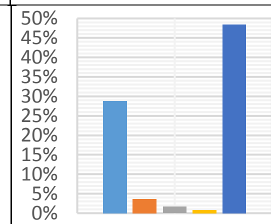
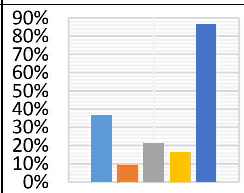
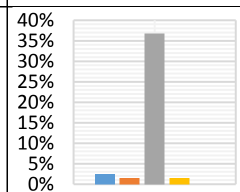
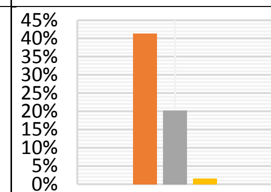
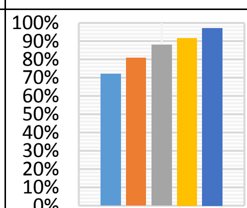
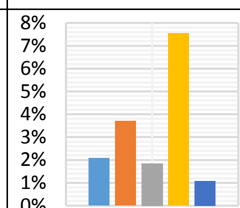
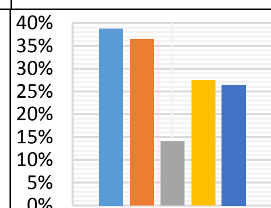
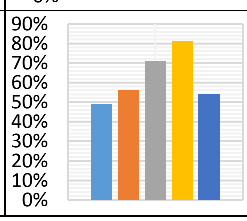
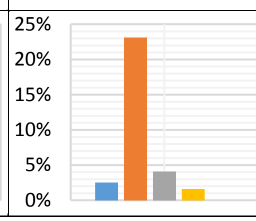
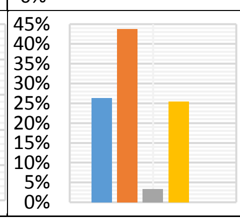
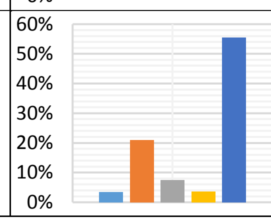
One result of this analysis is shown on Table 8, in which budget figures are compared, by department on a percentage basis, for budget figures pertaining to salaries, fixed assets (recognizing that these will change year-to-year), charges for services, and intergovernmental revenues.

TABLE 8. COUNTY COMPARISONS: FOUR COMPONENTS OF BUDGETS AS A PERCENT OF TOTAL APPROPRIATIONS, FOR EACH DEPARTMENT

County Legend	Contra Costa County
	Monterey County
	Ventura County
	Santa Barbara County
	San Joaquin County

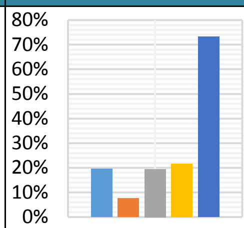
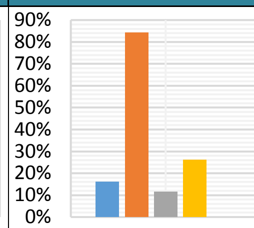
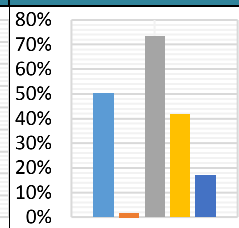
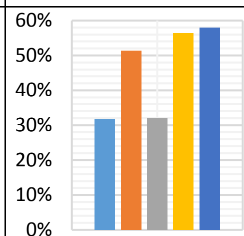
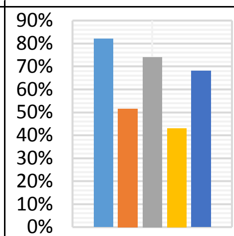
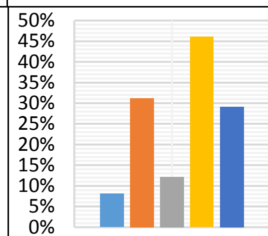
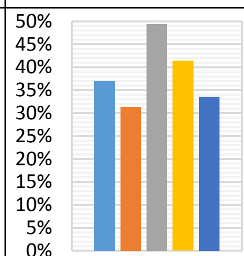
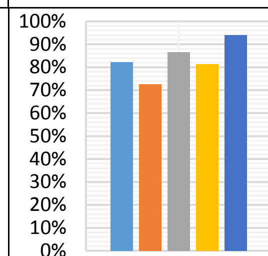
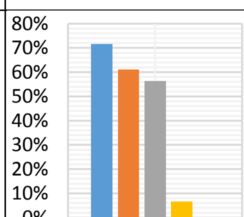
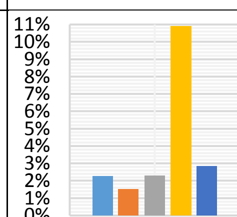
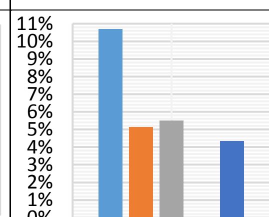
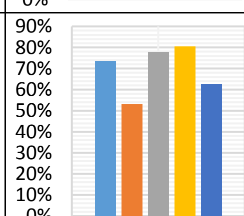
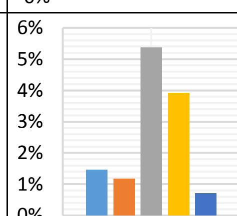
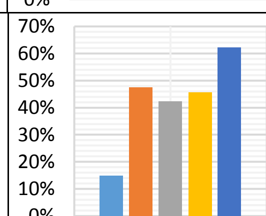
Department	Salaries	Fixed Asset Investment	Revenue from Charges for Services	Intergovernmental Revenue
Agricultural Commissioner		(1)		
Animal Services		(1)		(1)
Assessor-Clerk-Recorder		(1)		(1)
Auditor-Controller		(1)		(1)

County Legend	Contra Costa County	
	Monterey County	
	Ventura County	
	Santa Barbara County	
	San Joaquin County	

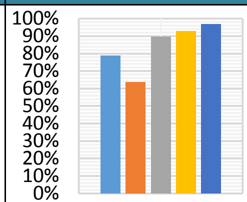
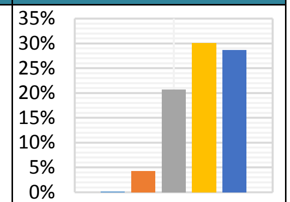
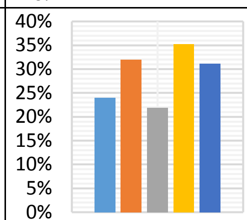
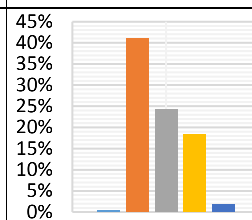
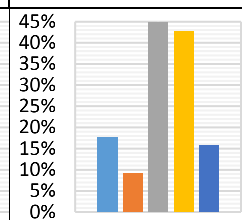
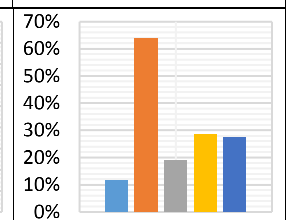
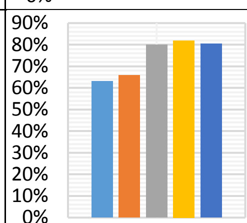
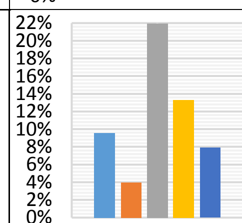
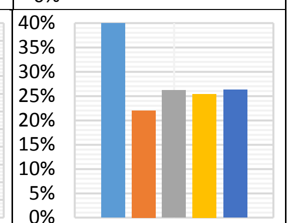
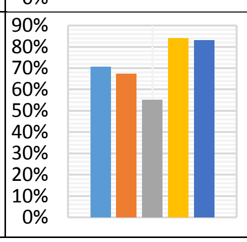
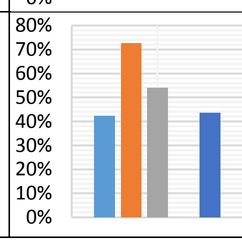
Department	Salaries	Fixed Asset Investment	Revenue from Charges for Services	Intergovernmental Revenue
Child Support Services[5]		(1)	(1); (2)	(2)
Community Development/RMA		(1)		
County Administrative Office		(1)		
District Attorney		(1)		
Emergency Services				

[5] Ventura County Child Support Services provides call center services for these other counties: Riverside, Santa Barbara, Humboldt, Kings, Lassen, Yolo, El Dorado, Monterey, Napa, Santa Cruz, San Benito, Trinity, Tuolumne, Amador, and Calaveras. Consequently, salary figures are not directly comparable among the counties.

County Legend	
	Contra Costa County
	Monterey County
	Ventura County
	Santa Barbara County
	San Joaquin County

Department	Salaries	Fixed Asset Investment	Revenue from Charges for Services	Intergovernmental Revenue
General Services				(1)
Health Care Services		(1)		
Human/Social Services		(1)	(1)	
Information Technology	(2)	(2)	(2)	(2)
Library Services		(1)		
Probation		(1)		

County Legend	
	Contra Costa County
	Monterey County
	Ventura County
	Santa Barbara County
	San Joaquin County

Department	Salaries	Fixed Asset Investment	Revenue from Charges for Services	Intergovernmental Revenue
Public Defender		(1)	(1)	
Public Works				
Sheriff-Coroner		(1)		
Treasurer-Tax Collector		(1)		(1)

(1) Values are not shown because they are all less than 5%.
(2) Characteristics of the database do not support a graphic presentation of values in this case.
Sources: Contra Costa County, Monterey County, Santa Barbara County, San Joaquin County, and Ventura County Fiscal Year 2016-2017 Proposed Budgets; TNDG.

TABLE 9. PERCENTAGE OF TOTAL BUDGET APPROPRIATIONS DERIVED FROM CHARGES FOR SERVICES AND INTERGOVERNMENTAL REVENUE

	Ventura[2]	Contra Costa[3,4]	Monterey	San Joaquin	Santa Barbara[1]
Total Appropriations	$2,158,566,339	$3,391,285,051	$1,266,936,453	$1,410,864,015	$966,476,205
Non-Tax/Non-Local Revenues					
Charges for Services	$1,007,965,723	$1,581,315,186	$288,795,317	$399,890,637	$247,202,096
Health Services	$598,547,587	$1,360,708,088	$255,307,808	$338,050,586	$102,458,027
Other	$409,418,136	$220,607,098	$33,487,509	$61,840,051	$144,744,069
Intergovernmental	$604,393,941	$826,078,088	$538,923,619	$665,648,160	$351,290,135
Total	$1,612,359,664	$2,407,393,274	$827,718,936	$1,065,538,797	$598,492,231
Non-Tax/Non-Local Revenues as % of Total Appropriations	74.7%	71.0%	65.3%	75.5%	61.9%

1. Santa Barbara does not have a county hospital, but contracts those services with local healthcare providers.
2. Ventura County Health Services includes the Public Health function, and the figures pertaining to this function are not included in Table 3, as this function is common to California counties generally.
3. Contra Costa County provides Medi-Cal managed care coverage plan for over 180,000 Medi-Cal beneficiaries, which is included in Health Services.
4. Local Revenue, Federal Assistance, and State Assistance have been classified as Charges for Services for Contra Costa Health Services (Enterprise Funds). Budgetary groupings may vary among counties creating variances in Charges for Services and Intergovernmental Revenue.

Sources: Contra Costa County, Monterey County, Santa Barbara County, San Joaquin County, and Ventura County Fiscal Year 2016-2017 Proposed Budgets; TNDG.

A simple method of sensitizing the budget figures to conditions in the counties is shown on Tables 10 and 11. On Table 10, data from a United Way publication, *Struggling To Get By, The Real Cost Measure in California 2015,* along with Census data, are used to rank of Ventura and the four comparison counties according to a combination of indicators that can be said to provide a general, simplified sense of the level of "social stress" present in those counties. The county-level measures used are the following:

- The Real Cost Measure, defined in the United Way report as the minimum amount a family of four would need to support themselves.
- Median earnings that would apply to this hypothetical household.
- The preceding data were used to prepare an index calculated by TNDG representing the median earnings divided by the Real Cost Measure.
- The percent of households with incomes below $50,000 (Census ACS).

This information is summarized on Table 10.

TABLE 10. REAL COST MEASURE BUDGET COMPARISONS

County	Real Cost Budget for 2 Adults, 1 Infant, 1 School Age Child who Rent Housing	Rank (lowest/most favorable, to highest/least favorable)	Median Household Earnings of Real Cost Households, 2011-2013 (2012 dollars)	Rank	Real Cost Budget as % of earnings	Rank	% households with incomes below $50,000	Rank (lowest/most favorable, to highest/least favorable)
Contra Costa	$59,594	6	$84,634	1	70.4%	1	32%	1
Ventura	$58,518	5	$81,205	2	72.1%	2	32%	1
Santa Barbara	$56,279	3	$65,593	3	85.8%	3	40%	3
San Joaquin	$47,597	1	$55,241	6	86.2%	4	47%	6
Monterey	$53,113	2	$61,168	5	86.8%	5	42%	4
California	*$57,202*	*4*	*$64,331*	*4*	*88.9%*	*6*	*42%*	*4*

Source: United Way publication, *Struggling To Get By, The Real Cost Measure in California 2015*; US Census; TNDG.

Combining the results of the above table, TNDG ranked the five counties from least to most social stress according to the following order:

Contra Costa
Ventura
Santa Barbara
Monterey
San Joaquin (moved to last place based on percent of incomes below $50,000)

On Table 11, the counties are ordered left to right from those having the least to most social stress according to the above discussion. In other words, the “best-off” county is in the first column. The first line of the table shows the overall per capita budget based on total appropriations. The rankings in the table matrix field show the rank of per-capita budget percentages within each county, as a percent of each county's total budget. By the reasoning applied to the table, we might expect that counties with the highest social stress levels would also rank highest in the percent of their budget applied to those departments that deal with social support.

TABLE 11. OVERALL BUDGET APPROPRIATIONS PER-CAPITA AND RANKING OF PER-CAPITA BUDGET PERCENTAGES, AS A PERCENTAGE OF EACH COUNTY'S TOTAL BUDGET

Counties ranked (left to right) according to indicators of distress					
	Contra Costa	Ventura	Santa Barbara	Monterey	San Joaquin
Overall budget appropriations per capita	$2,978	$2,680	$2,080	$2,588	$1,906
Departments	Rank of per-capita budget percentages, as % of each county's total budget				
Agricultural Commissioner	4	5	1	3	2
Animal Services	3	2	4	5	1
Assessor-Clerk-Recorder	3	2	5	4	1
Auditor-Controller	3	4	1	5	2
Child Support Services	4	5	3	1	2
Community Development/ RMA[6]	5	2	4	3	1
County Admin. Office	1	4	2	5	3
District Attorney	4	5	3	2	1
Emergency Services	2	3	4	5	1
General Services	1	3	4	5	2
Health Care Services	4	1	2	3	5
Human/Social Services	5	3	2	1	4
Information Technology	1	4	5	3	2
Library Services	4	2	1	5	3
Probation	4	5	1	3	2
Public Defender	4	5	2	3	1
Public Works	3	4	5	1	2
Sheriff-Coroner	2	4	5	3	1
Treasurer-Tax Collector	3	5	1	2	4

Source: Contra Costa County, Monterey County, Santa Barbara County, San Joaquin County, and Ventura County. Fiscal Year 2016-2017 Proposed Budgets; Department of Finance, E-5 City/County Population and Housing Estimates, 1/1/2016; TNDG.

[6] It should be noted that Ventura is the only County in California where Community Development/RMA includes the Environmental Health Division. This results in Community Development/RMA accounting for a larger percentage of the total budget in Ventura as compared to other counties.

Economic Vitality Strategic Planning Conditions in Ventura County

TNDG prepared a matrix summarizing key economic vitality strategic conditions, including strengths, weaknesses, opportunities, and threats (SWOT), and strategic goals or positions, and the County places and other entities/documents associated with those conditions. The matrix, shown in Appendix B, captures the fact that while there is some overlap among these conditions, many other conditions exist that are specific (or at least have been specifically noted as meaningful) to individual communities/entities. In its current form, the matrix has not yet been analyzed or organized thematically or otherwise.

The extent to which *cities* in Ventura County are engaged in economic development, and the localized entities through which this engagement occurs, is summarized on Table 12. The table includes a link to key documents through which this information was compiled, and that also supplied part of the information on Appendix C.

Table 12. Cities in Ventura County: Economic Development Entities and Functions

Economic Development Entities and Functions / Cities	Camarillo	Fillmore	Moorpark	Ojai	Oxnard	Port Hueneme	Santa Paula	Simi Valley	Thousand Oaks	Ventura City
City Government	Yes	Yes	Yes (1)	No	Yes	Yes (1)	Yes	Yes	Yes	Yes
Retention/expansion		X			X		X	X	X	X
Attraction	X	X			X	X	X	X	X	X
Support entrepreneurial startup and growth		X			X		X	X		X
Coordinate with regional ED partners		X	X		X		X	X	X	X
Other (2)					F		F			
Documentation type; reference legend #	1, E	3, G	4, H	10, J	4, M	6, R	7, T	15, C	9, W	11, A
Chamber of Commerce										
Retention/expansion	X		X		X			X	X	X
Attraction	X		X		X			X	X	X
Support entrepreneurial startup and growth			X		X				X	X
Coordinate with regional ED partners	X		X		X	X	X		X	X
Other (2)	T, I		I	I	C			T	W	
Documentation type; reference legend #	2, F		2, I	2, L	13, O	2, S	14, V	2, D	11, X	2, B
Visitors Bureau										
Other (2)				T	T				T	T
Documentation type; main reference legend #				16, K	12, P				16, Z	16, Y

1. Limited involvement.
2. Other: T = Tourism; I = Infrastructure; F = Film; C = Coordinate with Real Estate Community; W = Workforce

Sources: Various websites and documents (see below); TNDG.

References for Table 12

Place	Organization	Ref. key	Reference
Camarillo	City, Unknown Dept.	E	Camarillo Live Work Play Brochure
	Chamber of Commerce	F	https://www.camarillochamber.org/
Fillmore	City, Economic Development - City Manager's Office	G	http://www.fillmoreca.com/departments/economic-development
Moorpark	City, non-specified	H	https://www.moorparkca.gov/237/City-Programs
	Chamber of Commerce	I	http://www.moorparkchamber.com/economic-development.html
Ojai	City, Community Dev.	J	General Plan, Housing Element
	Ojai Visitors Bureau	K	http://www.ojaivisitors.com
	(Ojai Valley) Chamber of Commerce	L	http://ojaichamber.org
Oxnard	City, Economic Dev. Dept.	M	https://www.oxnard.org/city-department/ community-development/economic-development
		N	General Plan, Goals and Policies
	Oxnard Chamber of Commerce	O	Oxnard Business Voice (Nov 2016)
	Oxnard Visitors Bureau	P	http://oxnard.lunarcow.com/publication/index.php?i=292561&m=28062&l=1&p=1&pre=&ver=html5#{%22page%22:0,%22issue_id%22:292561}
		Q	http://visitoxnard.com/
Port Hueneme	City, Unknown Dept.	R	http://www.ci.port-hueneme.ca.us/index.aspx?NID=531
	Chamber of Commerce	S	http://www.huenemechamber.com/
Santa Paula	City, Economic Dev. Dept.	T	http://www.ci.santa-paula.ca.us/EconomicDevelopment/index.htm
		U	http://www.discoversantapaula.com
	Chamber of Commerce	V	https://santapaulachamber.net/
Simi Valley	Economic Development Division	C	City of Simi Valley Economic Development Program
	Simi Valley Chamber of Commerce	D	http://www.simivalleychamber.org
Thousand Oaks	City, City Manager - Office of Economic Dev.	W	http://www.toaks.org/departments/community-development/planning/general-plan/general-plan-goals-and-policies
	Greater Conejo Valley Chamber of Commerce	X	http://www.conejochamber.org
	Conejo Valley Tourism	Z	http://conejo.com/
Ventura City	City, no designated department/person	A	Economic Development Strategy – 2013-2017
	Ventura Chamber of Commerce	B	http://venturachamber.com/do-business-in-ventura/resources/
	Ventura Visitors & Convention Bureau	Y	https://visitventuraca.com/

Reference Type for Table 12

Reference type key	Reference Type Plan/Report/Article
1	Camarillo Live Work Play Brochure
2	Chamber website
3	City web page for ED
4	City website
5	Discover Oxnard
6	Doing business in Port Hueneme
7	Functions of Econ. Dev.
8	General information website
9	General Plan Goals and Policies
10	General Plan, Housing Element
11	Strategic Plan
12	Oxnard 2016 Visitors Guide
13	Oxnard Business Community Guide
14	Santa Paula - Living Here
15	Strategic Plan and psychographic data
16	Visitors Bureau website

Highlights of the *Industry Cluster Study* (a TNDG companion document)

Table 13, beginning on the next page, summarizes key findings from the more detailed industry cluster analysis provided in the *Cluster Summary Report*. The summary table lists all "traded" clusters that had 1,000 or more jobs in Ventura County in 2015, and provides the following information about each listed cluster:

- Total number of jobs in Ventura County in 2015 (the latest full year for which data are available).
- Location quotient (compared to U.S. benchmark) in 2015. The location quotient (LQ) measures how concentrated/important an industry cluster is in a region compared to national benchmarks. An LQ value greater than 1.0 indicates that a cluster is more concentrated in the region than it is nationally. This is generally regarded as an indication that the region has a comparative advantage relative to a particular cluster.
- Average annual wage in Ventura County.
- Change in the number of jobs for two time periods:
    - 2001-2015;
    - 2010-2015 (representing the post-recession expansion period).
- Job growth/retraction performance compared to state and national trends. As described in the full report, this part of the study is based on a "shift-share" analysis for each cluster that estimates an "expected" job change based on state/national trends. If Ventura County has higher job growth (or experiences less severe job losses) compared to the expected change, it indicates that the county has performed better than the state and national trends. Conversely, if Ventura County has less job growth (or experiences more severe job losses) compared to the expected change, it indicates that the county has performed worse than the state and national trends.

TABLE 13. SUMMARY CHARACTERISTICS AND TRENDS, VENTURA COUNTY'S LARGEST INDUSTRY CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 1,000 JOBS IN 2015)

Cluster	Ventura County Jobs in 2015	Location Quotient in 2015	Average Annual Wage	Change in Jobs, 2001-2015	Change in Jobs, 2010-2015	County performance compared to U.S.		County performance compared to California	
						2001-2015	2010-2015	2001-2015	2010-2015
Business Services	16,106	0.76	$80,960	548	48	Worse	Worse	Worse	Worse
Distribution and Electronic Commerce	11,681	0.89	$96,214	1,145	-84	Worse	Worse	Worse	Worse
Education and Knowledge Creation	6,620	0.59	$54,381	1,812	454	Better	Better	Better	Worse
Agricultural Inputs and Services	6,609	6.92	$36,595	-1,330	-1,151	Worse	Worse	Worse	Worse
Information Technology and Analytical Instruments	5,577	2.02	$97,236	-5,192	-655	Worse	Worse	Worse	Worse
Biopharmaceuticals	5,415	8.45	$328,105	-190	-1,274	Worse	Worse	Worse	Worse
Financial Services	5,381	1.14	$92,300	-1,795	-1,312	Worse	Worse	Worse	Worse
Hospitality and Tourism	5,211	0.64	$32,958	-287	444	Worse	Worse	Worse	Worse
Marketing, Design, and Publishing	3,303	0.84	$74,240	-284	-523	Worse	Worse	Worse	Worse
Metalworking Technology	2,407	2.14	$68,353	189	529	Better	Better	Better	Better
Construction Products and Services	2,277	1.01	$65,844	424	427	Better	Better	Better	Better
Insurance Services	1,949	0.63	$124,663	-4,065	-2,612	Worse	Worse	Worse	Worse
Downstream Chemical Products	1,442	2.32	$82,598	-472	286	Worse	Better	Worse	Better
Performing Arts	1,420	1.00	$54,292	131	70	Worse	Worse	Worse	Worse
Production Technology and Heavy Machinery	1,381	0.63	$64,744	-796	-135	Worse	Worse	Worse	Worse
Downstream Metal Products	1,240	1.23	$55,769	346	475	Better	Better	Better	Better
Printing Services	1,156	1.04	$46,223	-116	8	Better	Better	Better	Better
Food Processing and Manufacturing	1,139	0.47	$73,674	29	-38	Worse	Worse	Worse	Worse
Communications Equipment and Services	1,074	1.41	$76,389	-3,412	-788	Worse	Worse	Worse	Worse
Medical Devices	1,028	1.60	$66,226	71	169	Better	Better	Better	Better
Paper and Packaging	1,011	1.19	$72,489	-172	-39	Better	Better	Better	Worse

Sources: U.S. Cluster Mapping Project; Chmura Economics; TNDG.

Appendix A. Demographic and Employment Profile Data

Note: The first table (Table 1) in this series is shown in the Executive Summary.

Population Characteristics

TABLE 2: PROJECTED POPULATION GROWTH

	Projected Population				
	2012	2020	2035	2040	% Change, 2012-2040
Counties					
Ventura County	835,400	886,400	945,100	965,400	15.6%
Los Angeles County	9,922,600	10,326,200	11,145,100	11,514,800	16.0%
Orange County	3,071,600	3,271,100	3,431,200	3,461,500	12.7%
Riverside County	2,245,100	2,479,800	3,055,100	3,183,700	41.8%
San Bernardino County	2,068,000	2,197,400	2,637,400	2,731,300	32.1%
Santa Barbara County	423,884	445,955	507,566	520,010	22.7%
Cities					
Camarillo	66,300	69,500	78,300	79,900	20.5%
Fillmore	18,800	20,000	21,300	21,800	16.0%
Moorpark	34,800	39,000	43,000	43,000	23.6%
Ojai	7,500	7,700	8,200	8,400	12.0%
Oxnard	200,100	220,200	236,300	237,300	18.6%
Port Hueneme	21,800	22,100	22,200	22,400	2.8%
Ventura	106,700	112,500	122,000	125,300	17.4%
Santa Paula	29,800	34,400	37,100	39,600	32.9%
Simi Valley	125,100	129,200	136,700	142,400	13.8%
Thousand Oaks	127,800	129,800	130,500	131,700	3.1%
Unincorporated	96,700	102,000	109,500	113,600	17.5%

Sources: Southern California Association of Governments, Adopted 2016 RTP Growth Forecast; Santa Barbara County Association of Governments, Regional Growth Forecast, 2010-2040; TNDG.

Table 3: Population Compound Annual Growth

	Population Compound Annual Growth Rate		
	(2012-2020)	(2020-2035)	(2012-2040)
California	0.87%	0.80%	0.79%
Counties			
Ventura County	0.74%	0.43%	0.52%
Los Angeles County	0.50%	0.51%	0.53%
Orange County	0.79%	0.32%	0.43%
Riverside County	1.25%	1.40%	1.26%
San Bernardino County	0.76%	1.22%	1.00%
Santa Barbara County	0.64%	0.87%	0.73%
Cities			
Camarillo	0.59%	0.80%	0.67%
Fillmore	0.78%	0.42%	0.53%
Moorpark	1.43%	0.65%	0.76%
Ojai	0.33%	0.42%	0.41%
Oxnard	1.20%	0.47%	0.61%
Port Hueneme	0.17%	0.03%	0.10%
Ventura	0.66%	0.54%	0.58%
Santa Paula	1.81%	0.51%	1.02%
Simi Valley	0.40%	0.38%	0.46%
Thousand Oaks	0.19%	0.04%	0.11%
Unincorporated	0.67%	0.47%	0.58%

Sources: Southern California Association of Governments, Adopted 2016 RTP Growth Forecast; Santa Barbara County Association of Governments, Regional Growth Forecast, 2010-2040; TNDG.

Table 4: Percent of Population by Race/Ethnicity

			Combined Hispanic/Latino and Non-Hispanic/Latino					
	Non-Hispanic/ Latino	Hispanic/ Latino	White	Black or African American	American Indian and Alaska Native	Asian	Native Hawaiian and Other Pacific Islander	Some other race
State of California	61.8%	38.2%	65.8%	7.1%	1.9%	15.4%	0.8%	14.0%
Counties								
Ventura County	58.8%	41.2%	81.4%	2.5%	1.7%	8.7%	0.6%	9.6%
Los Angeles County	51.9%	48.1%	56.5%	9.4%	1.5%	15.5%	0.5%	20.8%
Orange County	66.0%	34.0%	66.1%	2.2%	1.0%	20.5%	0.6%	13.4%
Riverside County	53.5%	46.5%	68.8%	7.5%	1.9%	7.6%	0.7%	18.1%
San Bernardino County	49.5%	50.5%	66.4%	10.1%	2.0%	8.0%	0.7%	17.7%
Santa Barbara County	56.3%	43.7%	77.5%	2.9%	2.0%	6.6%	0.6%	14.8%
Cities								
Camarillo	74.5%	25.5%	79.8%	3.2%	1.2%	13.2%	0.5%	7.4%
Fillmore	20.9%	79.1%	77.1%	0.3%	4.0%	1.1%	1.3%	22.1%
Moorpark	70.2%	29.8%	80.7%	1.4%	0.8%	8.4%	0.6%	11.5%
Ojai	83.4%	16.6%	96.4%	0.5%	1.9%	2.2%	0.0%	3.9%
Oxnard	25.6%	74.4%	77.5%	3.6%	2.0%	9.0%	0.5%	11.3%
Port Hueneme	43.7%	56.3%	77.2%	7.3%	2.4%	7.3%	2.1%	11.5%
Ventura	67.3%	32.7%	84.9%	2.5%	1.9%	4.9%	0.5%	10.2%
Santa Paula	21.2%	78.8%	75.3%	0.4%	2.3%	1.8%	0.2%	23.7%
Simi Valley	75.6%	24.4%	82.1%	1.8%	1.9%	11.2%	0.6%	7.1%
Thousand Oaks	83.0%	17.0%	82.8%	1.8%	0.8%	12.0%	0.4%	6.8%
Census Designated Places								
Bell Canyon	92.4%	7.6%	82.4%	2.1%	4.6%	14.9%	1.6%	2.0%
Casa Conejo	67.3%	32.7%	81.7%	0.8%	0.3%	8.4%	0.6%	11.0%
Channel Islands Beach	92.3%	7.7%	93.5%	2.4%	2.1%	4.4%	0.0%	2.1%
El Rio	14.6%	85.4%	85.5%	0.8%	1.4%	2.8%	1.2%	13.0%
Lake Sherwood	92.1%	7.9%	87.5%	3.7%	2.5%	4.4%	0.0%	1.8%
Meiners Oak	54.2%	45.8%	86.7%	0.3%	3.6%	1.6%	0.0%	9.7%
Mira Monte	83.8%	16.2%	95.0%	0.3%	1.8%	1.8%	0.0%	3.6%
Oak Park	93.0%	7.0%	84.7%	0.6%	0.4%	15.9%	0.0%	1.4%
Oak View	72.0%	28.0%	93.6%	0.0%	2.7%	1.0%	0.0%	5.4%
Piru	10.8%	89.2%	76.9%	0.0%	0.2%	0.2%	0.0%	26.4%
Santa Rosa Valley	91.4%	8.6%	94.2%	2.1%	0.6%	3.4%	0.0%	0.3%
Santa Susana	80.4%	19.6%	86.7%	7.5%	0.0%	0.0%	0.0%	5.9%
Saticoy	18.2%	81.8%	75.2%	0.0%	9.4%	4.1%	0.0%	18.8%

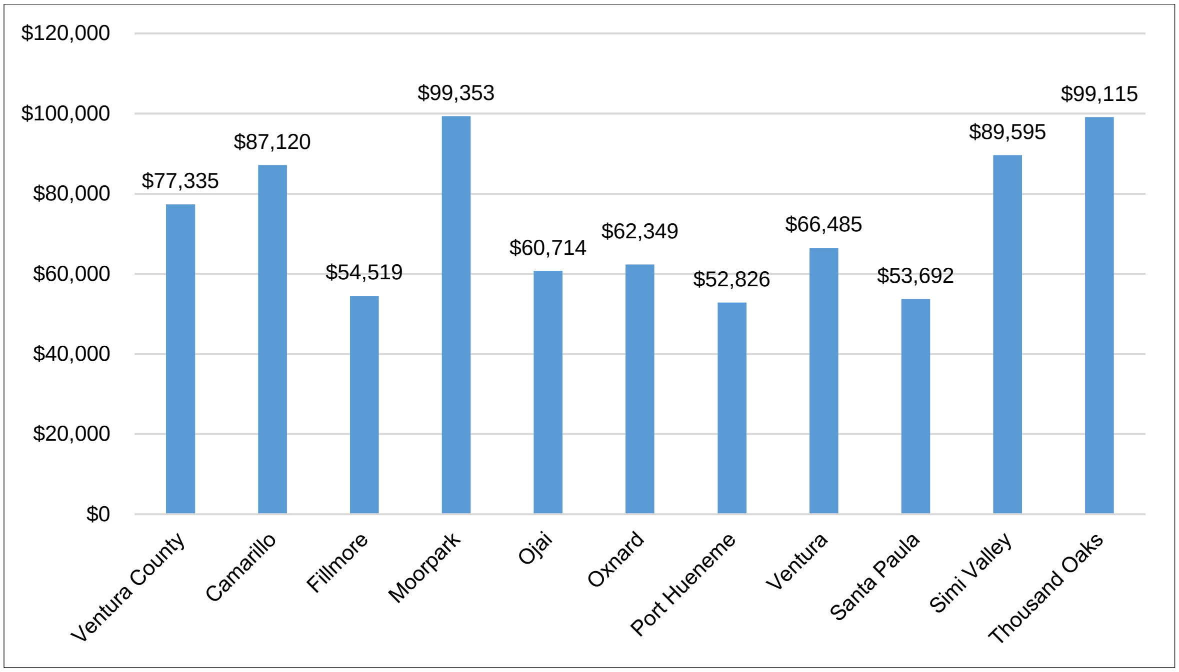
Sources: American Community Survey, 2014 5-Year Estimates, Data Profiles; TNDG.

Table 5: 2014 Percent of Population 25 Years and Older by Educational Attainment

	High School Diploma	Associates Degree; Some College, No Degree	Bachelor's Degree	Graduate Degree
State of California	20.7%	29.8%	19.6%	11.4%
Counties				
Ventura County	19.0%	32.4%	19.9%	11.7%
Los Angeles County	20.5%	26.4%	19.5%	10.4%
Orange County	17.8%	28.9%	24.2%	13.1%
Riverside County	25.5%	33.5%	13.4%	7.4%
San Bernardino County	26.3%	33.3%	12.1%	6.7%
Santa Barbara County	17.8%	30.1%	18.6%	12.8%
Cities				
Camarillo	17.0%	35.2%	24.7%	15.7%
Fillmore	20.7%	33.7%	6.2%	4.2%
Moorpark	16.4%	34.9%	25.1%	12.2%
Ojai	14.5%	30.3%	24.7%	22.0%
Oxnard	21.1%	27.7%	11.3%	4.5%
Port Hueneme	24.7%	33.7%	11.8%	6.5%
Ventura	18.8%	37.1%	20.6%	13.0%
Santa Paula	22.2%	29.4%	8.9%	5.0%
Simi Valley	21.4%	37.0%	21.6%	10.6%
Thousand Oaks	14.7%	29.1%	29.1%	19.5%
Census Designated Places				
Bell Canyon	11.1%	22.7%	33.8%	31.0%
Casa Conejo	27.8%	36.3%	12.9%	8.8%
Channel Islands Beach	17.6%	31.6%	33.0%	16.5%
El Rio	29.9%	20.9%	4.7%	1.8%
Lake Sherwood	16.4%	23.3%	30.6%	27.8%
Meiners Oak	18.2%	24.8%	18.5%	10.0%
Mira Monte	17.3%	44.9%	16.9%	10.7%
Oak Park	10.0%	27.8%	34.7%	25.3%
Oak View	21.8%	40.4%	14.6%	9.6%
Piru	21.0%	30.2%	6.4%	3.2%
Santa Rosa Valley	13.3%	25.0%	32.9%	25.0%
Santa Susana	17.0%	48.1%	28.5%	4.1%
Saticoy	33.0%	9.2%	9.4%	3.7%

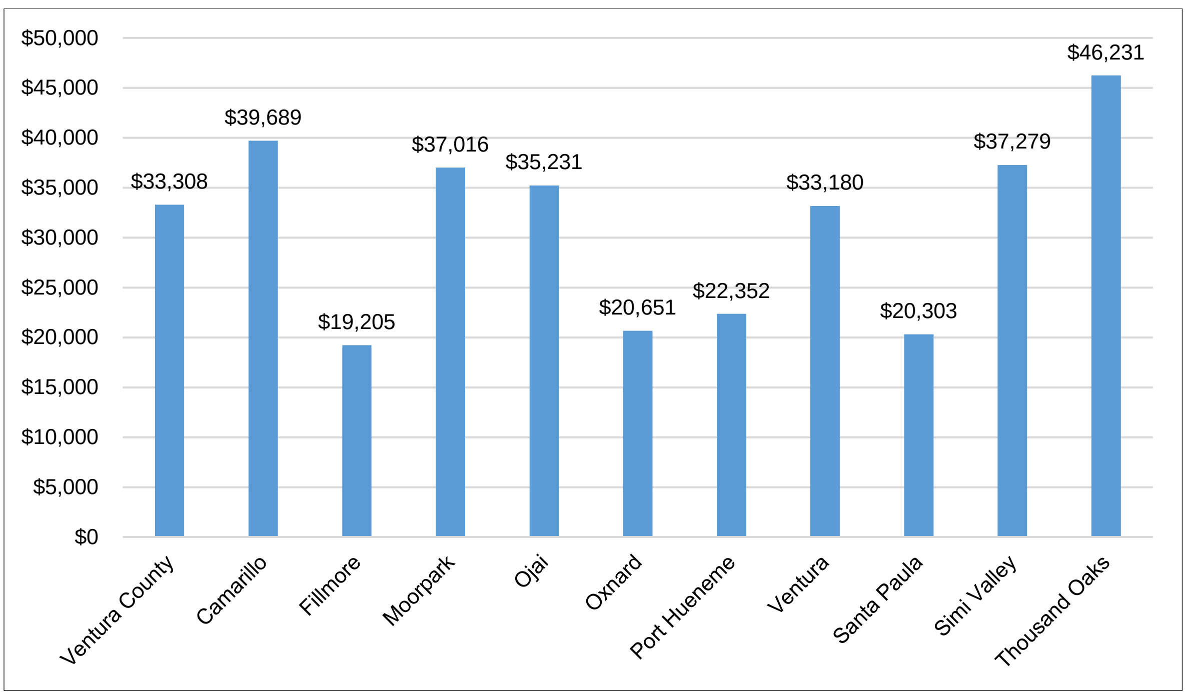
Sources: American Community Survey, 2014 5-Year Estimates, Data Profiles; TNDG.

FIGURE 1: 2014 MEDIAN HOUSEHOLD INCOME VENTURA COUNTY AND CITIES IN VENTURA COUNTY



Source: American Community Survey, 2014 5-Year Estimates, Data Profiles; TNDG.

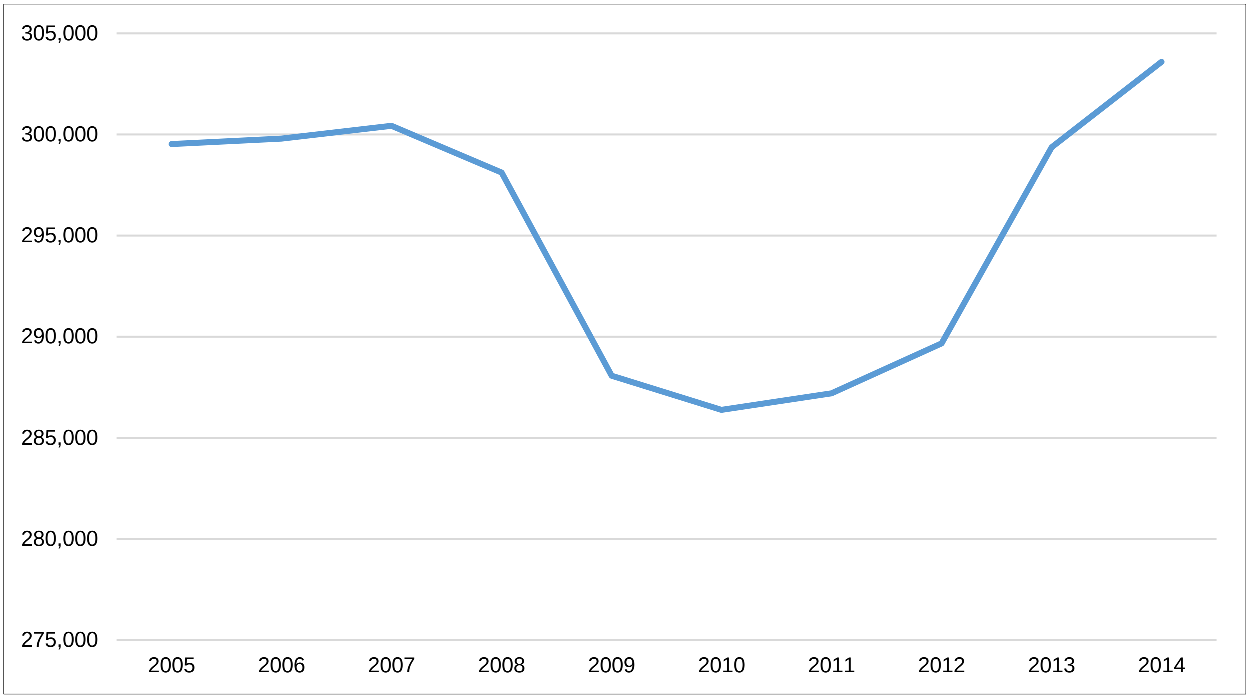
FIGURE 2: 2014 PER CAPITA INCOME VENTURA COUNTY AND CITIES IN VENTURA COUNTY



Source: American Community Survey, 2014 5-Year Estimates, Data Profiles; TNDG.

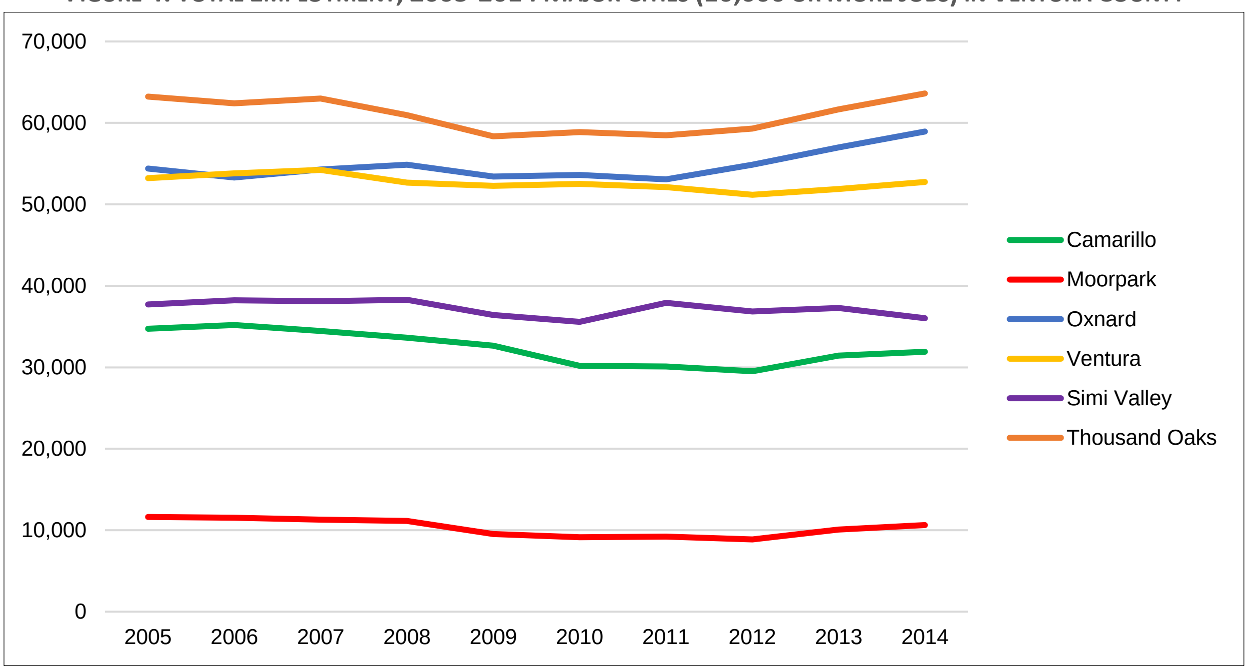
Employment

FIGURE 3: TOTAL EMPLOYMENT, 2005-2014 VENTURA COUNTY



Source: Census LEHD, OnTheMap, Work Area Profiles 2005-2014; TNDG. Data are for place of work and include cases of multiple jobs held by one person.

FIGURE 4: TOTAL EMPLOYMENT, 2005-2014 MAJOR CITIES (10,000 OR MORE JOBS) IN VENTURA COUNTY



Source: Census LEHD, OnTheMap, Work Area Profiles 2005-2014; TNDG. Data are for place of work and include cases of multiple jobs held by one person.

TABLE 6: 2014 COMMUTING TIMES, VENTURA COUNTY AND COMPARISON GEOGRAPHIES

Place	Average Commute Time (Minutes)	Place	Average Commute Time (Minutes)
Counties		**Census Designated Places**	
Ventura County	25.1	Bell Canyon	32.8
Los Angeles	29.6	Casa Conejo	22.1
Orange	26.6	Channel Islands Beach	30.2
Riverside	32.1	El Rio	22.5
San Bernardino	30.3	Lake Sherwood	30.4
Santa Barbara	19.4	Meiners Oak	22.5
Cities		Mira Monte	30.5
Camarillo	22.9	Oak Park	29.6
Fillmore	29.6	Oak View	23.3
Moorpark	25.7	Piru	29.5
Ojai	25.4	Santa Rosa Valley	29.0
Oxnard	23.6	Santa Susana	40.9
Port Hueneme	23.9	Saticoy	24.0
Ventura	23.0		
Santa Paula	27.2		
Simi Valley	28.9		
Thousand Oaks	24.8		

Source: American Community Survey, 2014 5-Year Estimates, Data Profiles.

Out-commuting from Ventura County. Although the number of workers residing in Ventura County that work outside the County is understood to be an issue, obtaining accurate estimates of this commuting pattern presents a challenge. Two primary sources of official data vary widely in their estimates. The U.S. Census Bureau's On the Map (OTM) figures (recently updated for 2015) indicate that over 160,000 Ventura County residents work outside the County, while the Census Bureau's American Community Survey (ACS) figures put the estimate closer to 85,000.[7]

[7]OTM: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics (2002-2015). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed October 2017 at https://onthemap.ces.census.gov.
ACS: U.S. Census Bureau, 2009-2013 American Community Survey. Residence County to Workplace County Commuting Flows for the United States and Puerto Rico Sorted by Residence Geography.

TABLE 7: 2014 EMPLOYMENT BY INDUSTRY COMPARISONS

Ventura County	Location Quotient County/State (1)	State % Growth 2005-14	County % Growth 2005-14	Total Jobs (2014) County	New Jobs In County 2005-14	Compound Annual Growth Rate
Agriculture, Forestry, Fishing and Hunting	4.14	11.7%	13.4%	30,890	3,662	1.41%
Mining, Quarrying, and Oil and Gas Extraction	2.41	50.7%	55.8%	1,306	468	5.05%
Utilities	0.76	3.2%	11.5%	1,567	162	1.22%
Construction	1.06	-19.0%	-23.0%	14,024	(4,180)	-2.86%
Manufacturing	1.27	-14.8%	-18.3%	31,015	(6,961)	-2.22%
Wholesale Trade	1.00	6.8%	5.3%	13,757	695	0.58%
Retail Trade	1.04	0.6%	3.6%	31,637	1,091	0.39%
Transportation and Warehousing	0.50	9.6%	13.7%	4,728	570	1.44%
Information	0.51	17.4%	1.0%	5,564	56	0.11%
Finance and Insurance	1.32	-14.6%	6.2%	13,281	770	0.67%
Real Estate and Rental and Leasing	0.79	-3.8%	-4.7%	4,109	(203)	-0.53%
Professional, Scientific, and Technical Services	0.71	22.7%	3.9%	16,281	605	0.42%
Management of Companies and Enterprises	0.37	2.0%	-71.7%	1,765	(4,478)	-13.10%
Administration & Support, Waste Management and Remediation	0.89	7.9%	-13.5%	17,240	(2,699)	-1.60%
Educational Services	0.98	10.1%	5.3%	26,675	1,346	0.58%
Health Care and Social Assistance	0.88	57.3%	39.9%	37,052	10,572	3.80%
Arts, Entertainment, and Recreation	0.88	12.2%	9.3%	5,671	481	0.99%
Accommodation and Food Services	0.93	21.4%	14.1%	26,959	3,341	1.48%
Other Services (excluding Public Administration)	0.86	-29.4%	-26.4%	8,577	(3,069)	-3.34%
Public Administration	0.79	98.6%	19.0%	11,496	1,834	1.95%

1. The Location Quotient (LQ) quantifies how concentrated particular industries are compared to some reference area, in this case the State.

Source: On the Map, Work Area Profiles 2005-2014; TNDG

TABLE 8: PROJECTED EMPLOYMENT GROWTH

	Projected Employment				
	2012	2020	2035	2040	% Change, 2012-2040
Counties					
Ventura County	332,200	374,300	409,600	419,800	26.4%
Los Angeles County	4,246,600	4,662,500	5,062,100	5,225,800	23.1%
Orange County	1,526,500	1,730,400	1,870,500	1,898,900	24.4%
Riverside County	616,600	848,700	1,111,800	1,174,300	90.4%
San Bernardino County	659,500	789,500	998,000	1,028,100	55.9%
Santa Barbara County	192,107	221,871	240,708	247,758	29.0%
Cities					
Camarillo	35,800	40,500	45,700	47,300	32.1%
Fillmore	3,000	4,100	5,000	5,300	76.7%
Moorpark	11,300	14,300	15,900	16,600	46.9%
Ojai	5,100	5,100	5,300	5,300	3.9%
Oxnard	58,100	68,000	78,200	79,200	36.3%
Port Hueneme	6,400	6,600	6,700	6,700	4.7%
Ventura	60,700	62,700	65,200	66,000	8.7%
Santa Paula	7,800	9,900	11,200	11,700	50.0%
Simi Valley	44,000	53,700	59,000	61,100	38.9%
Thousand Oaks	68,200	73,700	79,800	81,900	20.1%
Unincorporated	31,800	35,700	37,600	38,700	21.7%

Sources: Southern California Association of Governments, Adopted 2016 RTP Growth Forecast; Santa Barbara County Association of Governments, Regional Growth Forecast, 2010-2040; TNDG.

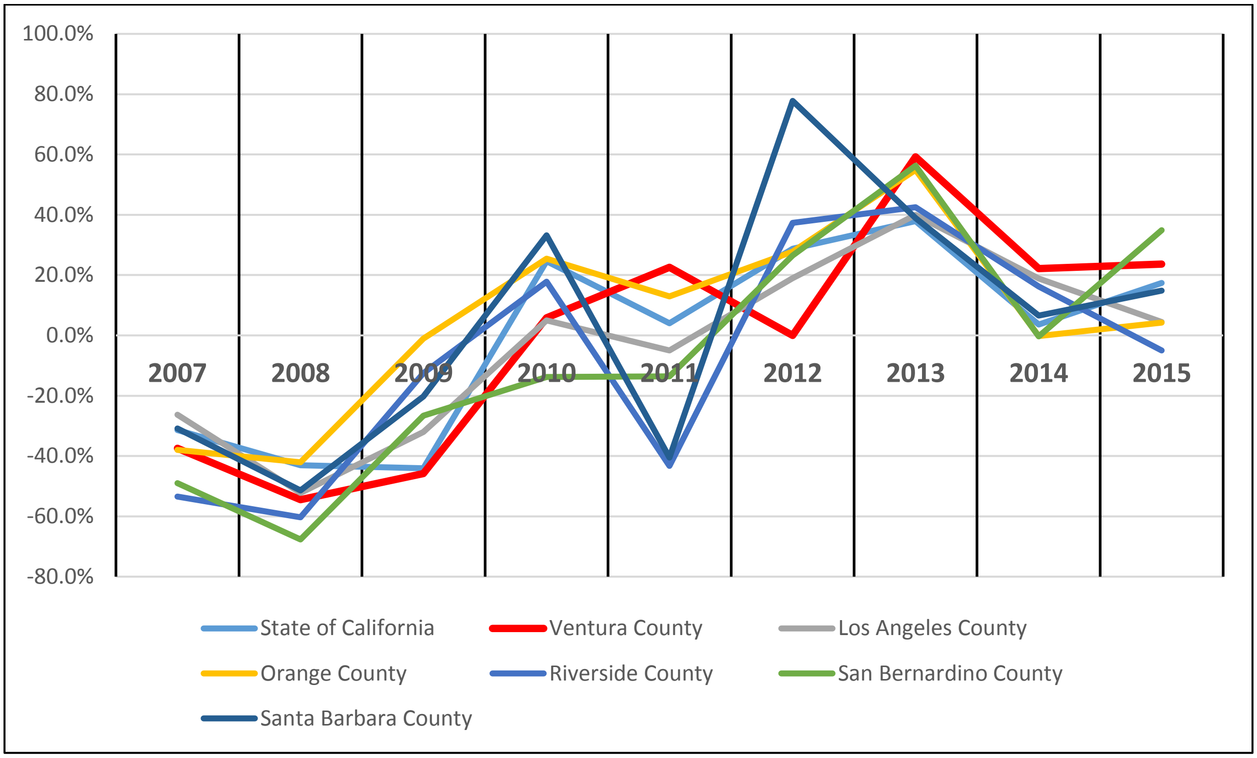
TABLE 9: EMPLOYMENT COMPOUND ANNUAL GROWTH

	Employment Compound Annual Growth Rate		
	(2008-2020)	(2020-2035)	(2008-2035)
Ventura County	0.7%	0.5%	0.6%
Los Angeles County	0.4%	0.4%	0.4%
Orange County	0.0%	0.6%	0.3%
Riverside County	2.9%	1.9%	2.3%
San Bernardino County	1.2%	1.8%	1.5%
Santa Barbara County	1.4%	0.6%	1.0%
Camarillo	1.3%	0.5%	0.9%
Fillmore	0.7%	0.7%	0.7%
Moorpark	1.4%	0.7%	1.0%
Ojai	1.0%	0.6%	0.8%
Oxnard	0.7%	0.6%	0.6%
Port Hueneme	-0.3%	0.2%	0.0%
Ventura	0.9%	0.6%	0.8%
Santa Paula	0.8%	0.5%	0.7%
Simi Valley	0.9%	0.6%	0.8%
Thousand Oaks	0.6%	0.5%	0.6%
Unincorporated	-0.1%	0.3%	0.1%

Sources: Southern California Association of Governments, Adopted 2016 RTP Growth Forecast; Santa Barbara County Association of Governments, Regional Growth Forecast, 2010-2040; On the Map, Work Area Profile, State of California, 2008; California Employment Development Department, Industry Employment Projections, 2012-2022; TNDG.

Other Economic Conditions

FIGURE 5: YEAR-BY-YEAR PERCENT CHANGE IN NUMBER OF ANNUAL RESIDENTIAL PERMITS, BY COUNTY AND CALIFORNIA



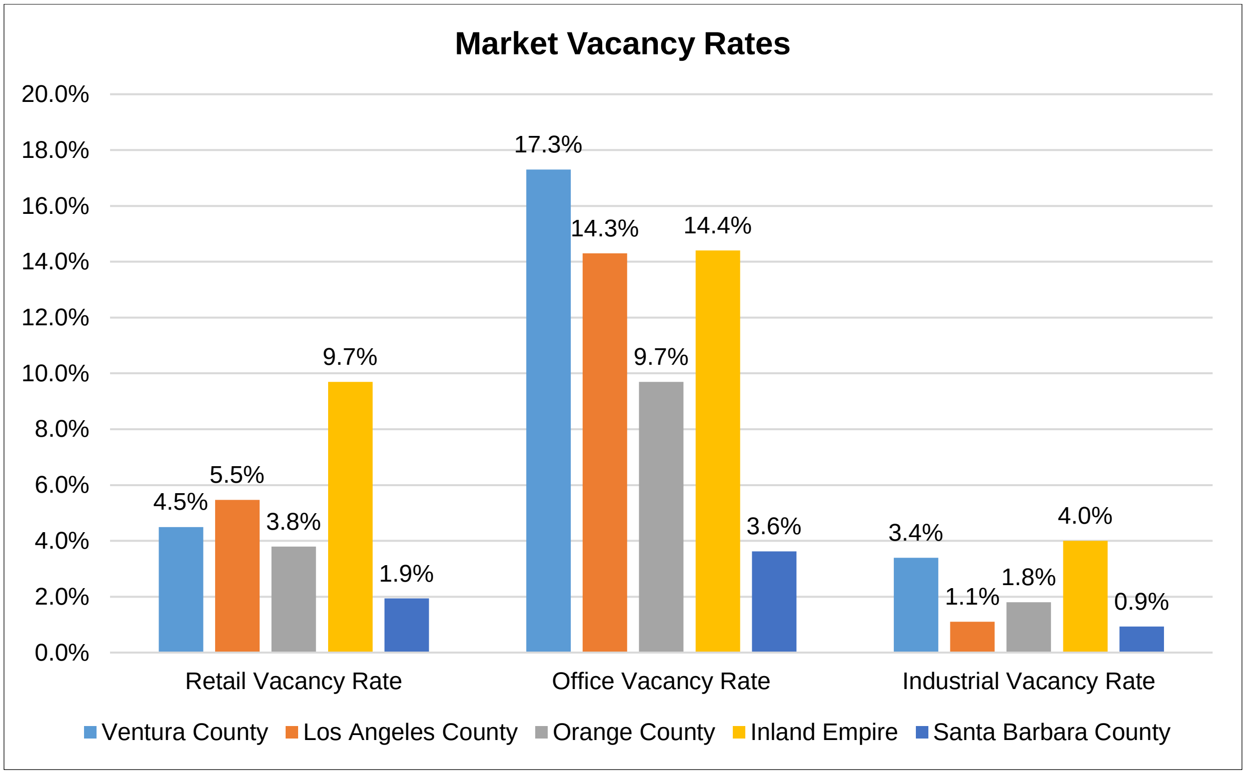
Sources: US Census, Building Permit Database, 2005-2015; TNDG.

TABLE 10: 2016 NON-RESIDENTIAL BUILDING CONDITIONS VENTURA COUNTY AND COMPARISON GEOGRAPHIES

	Retail Vacancy Rate	Retail Average Leasing Rate ($PSF/MO/NNN)	Office Vacancy Rate	Office Average Leasing Rate ($PSF/MO/NNN)	Industrial Vacancy Rate	Industrial Average Leasing Rate ($PSF/MO/NNN)
Ventura County	4.5%	$2.38	17.3%	$3.00	3.4%	$0.64
Los Angeles County	5.5%	$2.37	14.3%	$2.20	1.1%	$0.71
Orange County	3.8%	$2.20	9.7%	$2.46	1.8%	$0.78
Inland Empire	9.7%	$1.90	14.4%	$1.86	4.0%	$0.44
Santa Barbara County	1.9%	N/A	3.6%	N/A	0.9%	N/A

Sources: CBRE, Industrial, Office, and Retail Market Views for Los Angeles County, Orange County, and the Inland Empire, Q1 2016; Lee & Associates, The Lee Central Coast Brief, Q1 2016; TNDG.

FIGURE 6: 2016 MARKET VACANCY RATES VENTURA COUNTY AND COMPARISON GEOGRAPHIES



Sources: CBRE, Industrial, Office, and Retail Market Views for Los Angeles County, Orange County, and the Inland Empire, Q1 2016; Lee & Associates, The Lee Central Coast Brief, Q1 2016; TNDG.

As seen on Table 23, below, Ventura County ranks last among all the comparison geographies in share of the economy supported by travel spending.

TABLE 11: TOURISM STATISTICS VENTURA COUNTY AND COMPARISON GEOGRAPHIES

Counties	2014 Total Direct Travel Spending ($Millions)	Change in Travel-Generated Tax Revenue (2006-2014)	Employment Generated by Travel Spending (Thousand Jobs)	Change in Travel-Generated Employment (2006-2014)	2014 Travel-Generated Tax Revenue per Household	2013 Visitor-Related Taxable Sales ($Millions)	2013 Percent of Taxable Sales Attributed to Visitors
California	$117,500	21.6%	1,027.0	10.7%	$460	$42,248	7.2%
Ventura	$1,603	16.9%	16.1	5.9%	$460	$705	5.5%
Los Angeles	$25,034	17.2%	187.2	6.1%	$610	$8,245	5.9%
Orange	$10,829	13.7%	95.3	1.4%	$820	$3,726	6.5%
Riverside	$7,076	18.3%	72.6	17.3%	$740	$3,088	10.3%
San Bernardino	$4,467	10.8%	50.1	11.3%	$510	$1,843	5.9%
Santa Barbara	$1,994	20.3%	18.8	13.3%	$1,130	$778	12.3%

Sources: Dean Runyon Associates California Travel Impacts 1992-2014p, April 2015; TNDG.

TABLE 12: SALES TAXES

Geographic Area	Sales Tax Permits (2013)	Taxable Transactions (2013, in $1,000)	Per Capita Taxable Transactions (2013)	% Change in Sales Tax Permits (2004-2013)	% Change in Total Taxable Transactions (2004-2013)
State of California	981,756	$586,839,618	$18,434	-6.4%	17.3%
Counties					
Ventura County	22,234	$12,824,296	$15,251	-6.6%	14.7%
Los Angeles County	263,792	$140,079,708	$13,975	-10.7%	14.3%
Orange County	94,862	$57,591,217	$18,556	-6.5%	11.4%
Riverside County	46,805	$30,065,467	$13,265	9.3%	24.0%
San Bernardino County	46,632	$31,177,823	$14,942	-1.8%	19.0%
Santa Barbara County	12,708	$6,332,059	$14,612	-6.6%	14.3%
Cities					
Camarillo	N/A	$1,301,651	$19,117	N/A	37.0%
Fillmore	N/A	$731,971	$48,105	N/A	622.8%
Moorpark	N/A	$339,152	$9,600	N/A	46.3%
Ojai	N/A	$106,142	$14,240	N/A	18.6%
Oxnard	N/A	$2,395,169	$11,931	N/A	10.2%
Port Hueneme	N/A	$79,194	$3,612	N/A	4.6%
Ventura	N/A	$2,019,722	$18,755	N/A	3.9%
Santa Paula	N/A	$207,454	$6,871	N/A	26.9%
Simi Valley	N/A	$1,463,415	$11,580	N/A	6.5%
Thousand Oaks	N/A	$2,471,308	$18,908	N/A	-3.5%
Unincorporated	N/A	$1,709,117	$17,594	N/A	13.0%

Sources: California Dept. of Finance: Table E-5, California State Board of Equalization: Taxable Sales by City, Years 2004-2013; TNDG.

Appendix B. IMPLAN economic sectors economically impacted by Ventura County government spending, sorted by the level of secondary output effects ($1 million and above)

IMPLAN Sector	Description	Indirect	Induced	Total Secondary
441	Owner-occupied dwellings	$0	$120,998,114	$120,998,114
440	Real estate	$31,474,570	$59,040,026	$90,514,596
395	Wholesale trade	$31,104,505	$40,096,969	$71,201,474
433	Monetary authorities and depository credit intermediation	$11,258,143	$29,703,762	$40,961,905
437	Insurance carriers	$13,419,644	$23,036,414	$36,456,058
482	Hospitals	$279,483	$33,616,145	$33,895,628
502	Limited-service restaurants	$1,717,142	$28,988,004	$30,705,146
475	Offices of physicians	$0	$28,022,738	$28,022,738
62	Maintenance and repair construction of nonresidential structures	$22,680,952	$5,309,267	$27,990,219
436	Other financial investment activities	$10,459,731	$16,195,349	$26,655,080
428	Wireless telecommunications carriers (except satellite)	$3,611,245	$16,375,363	$19,986,608
438	Insurance agencies, brokerages, and related activities	$7,393,726	$12,453,808	$19,847,534
449	Architectural, engineering, and related services	$15,643,482	$3,662,040	$19,305,522
464	Employment services	$12,342,517	$6,835,510	$19,178,027
501	Full-service restaurants	$2,764,023	$15,541,060	$18,305,083
407	Retail - Nonstore retailers	$8,264,200	$7,526,015	$15,790,215
400	Retail - Food and beverage stores	$410,166	$14,418,734	$14,828,900
405	Retail - General merchandise stores	$1,936,595	$12,873,089	$14,809,684
427	Wired telecommunications carriers	$2,600,878	$11,057,685	$13,658,563
447	Legal services	$5,010,275	$8,466,419	$13,476,694
504	Automotive repair and maintenance, except car washes	$2,009,081	$11,246,380	$13,255,461
396	Retail - Motor vehicle and parts dealers	$1,317,547	$10,996,478	$12,314,025
434	Nondepository credit intermediation and related activities	$3,287,617	$8,958,379	$12,245,996
439	Funds, trusts, and other financial vehicles	$356,021	$11,539,555	$11,895,576
403	Retail - Clothing and clothing accessories stores	$6,535,188	$5,276,031	$11,811,219
156	Petroleum refineries	$6,125,832	$4,972,214	$11,098,046
476	Offices of dentists	$0	$10,050,060	$10,050,060
63	Maintenance and repair construction of residential structures	$4,024,043	$5,790,806	$9,814,849
411	Truck transportation	$4,410,658	$4,909,479	$9,320,137
399	Retail - Building material and garden equipment and supplies stores	$1,391,078	$7,780,011	$9,171,089
454	Management consulting services	$6,214,692	$2,921,980	$9,136,672

IMPLAN Sector	Description	Indirect	Induced	Total Secondary
526	Other local government enterprises	$1,482,047	$7,252,271	$8,734,318
445	Commercial and industrial machinery and equipment rental and leasing	$7,812,318	$893,008	$8,705,326
401	Retail - Health and personal care stores	$2,671,446	$5,814,987	$8,486,433
483	Nursing and community care facilities	$0	$8,164,801	$8,164,801
477	Offices of other health practitioners	$0	$7,951,787	$7,951,787
448	Accounting, tax preparation, bookkeeping, and payroll services	$3,573,552	$3,266,508	$6,840,060
503	All other food and drinking places	$393,810	$6,395,006	$6,788,816
485	Individual and family services	$0	$6,166,734	$6,166,734
468	Services to buildings	$2,154,862	$3,825,042	$5,979,904
471	Waste management and remediation services	$3,229,339	$2,745,684	$5,975,023
478	Outpatient care centers	$0	$5,881,595	$5,881,595
480	Home health care services	$0	$5,724,122	$5,724,122
461	Management of companies and enterprises	$2,628,471	$3,053,954	$5,682,425
49	Electric power transmission and distribution	$1,572,691	$3,898,707	$5,471,398
462	Office administrative services	$3,772,097	$1,471,452	$5,243,549
435	Securities and commodity contracts intermediation and brokerage	$1,843,682	$3,369,252	$5,212,934
473	Junior colleges, colleges, universities, and professional schools	$31,981	$5,163,506	$5,195,487
509	Personal care services	$0	$5,071,208	$5,071,208
406	Retail - Miscellaneous store retailers	$1,891,799	$3,131,147	$5,022,946
520	Other federal government enterprises	$1,297,087	$3,719,774	$5,016,861
481	Other ambulatory health care services	$3,268,410	$1,684,918	$4,953,328
507	Commercial and industrial machinery and equipment repair and maintenance	$3,615,266	$1,302,948	$4,918,214
457	Advertising, public relations, and related services	$2,098,239	$2,775,276	$4,873,515
469	Landscape and horticultural services	$1,614,802	$2,947,141	$4,561,943
472	Elementary and secondary schools	$0	$4,424,058	$4,424,058
460	Marketing research and all other miscellaneous professional, scientific, and technical services	$2,624,353	$1,750,470	$4,374,823
430	Data processing, hosting, and related services	$2,251,095	$2,066,304	$4,317,399
508	Personal and household goods repair and maintenance	$2,004,697	$2,112,184	$4,116,881
414	Scenic and sightseeing transportation and support activities for transportation	$2,097,238	$1,943,122	$4,040,360
465	Business support services	$2,289,000	$1,679,263	$3,968,263
397	Retail - Furniture and home furnishings stores	$273,071	$3,634,618	$3,907,689
402	Retail - Gasoline stores	$1,146,778	$2,506,395	$3,653,173
514	Grantmaking, giving, and social advocacy organizations	$4,309	$3,589,251	$3,593,560
486	Community food, housing, and other relief services, including rehabilitation services	$0	$3,498,003	$3,498,003

IMPLAN Sector	Description	Indirect	Induced	Total Secondary
50	Natural gas distribution	$947,069	$2,531,930	$3,478,999
404	Retail - Sporting goods, hobby, musical instrument and book stores	$818,538	$2,588,094	$3,406,632
20	Extraction of natural gas and crude petroleum	$1,879,436	$1,499,569	$3,379,005
419	Book publishers	$631,001	$2,723,048	$3,354,049
459	Veterinary services	$581,151	$2,649,596	$3,230,747
474	Other educational services	$25,763	$3,170,382	$3,196,145
516	Labor and civic organizations	$6,494	$3,178,184	$3,184,678
512	Other personal services	$112,627	$3,051,192	$3,163,819
455	Environmental and other technical consulting services	$2,130,626	$989,452	$3,120,078
453	Other computer related services, including facilities management	$1,894,800	$1,152,033	$3,046,833
398	Retail - Electronics and appliance stores	$102,443	$2,912,963	$3,015,406
426	Cable and other subscription programming	$1,011,965	$1,968,728	$2,980,693
415	Couriers and messengers	$1,455,707	$1,508,847	$2,964,554
487	Child day care services	$0	$2,957,470	$2,957,470
425	Radio and television broadcasting	$1,209,688	$1,739,518	$2,949,206
495	Gambling industries (except casino hotels)	$42,891	$2,839,795	$2,882,686
479	Medical and diagnostic laboratories	$1,197,291	$1,680,187	$2,877,478
466	Travel arrangement and reservation services	$856,140	$1,952,249	$2,808,389
416	Warehousing and storage	$965,774	$1,720,661	$2,686,435
513	Religious organizations	$0	$2,561,631	$2,561,631
518	Postal service	$1,117,065	$1,422,580	$2,539,645
423	Motion picture and video industries	$300,040	$2,223,871	$2,523,911
446	Lessors of nonfinancial intangible assets	$1,144,565	$1,327,005	$2,471,570
506	Electronic and precision equipment repair and maintenance	$1,521,402	$914,315	$2,435,717
412	Transit and ground passenger transportation	$476,320	$1,882,008	$2,358,328
452	Computer systems design services	$1,540,393	$799,995	$2,340,388
496	Other amusement and recreation industries	$97,655	$2,171,324	$2,268,979
497	Fitness and recreational sports centers	$109,802	$2,095,654	$2,205,456
431	News syndicates, libraries, archives and all other information services	$247,552	$1,847,221	$2,094,773
470	Other support services	$1,279,974	$748,709	$2,028,683
511	Dry-cleaning and laundry services	$953,991	$1,053,030	$2,007,021
450	Specialized design services	$1,076,273	$733,616	$1,809,889
42	Electric power generation - Fossil fuel	$504,761	$1,251,307	$1,756,068
492	Independent artists, writers, and performers	$498,598	$1,028,533	$1,527,131
154	Printing	$669,987	$855,865	$1,525,852
442	Automotive equipment rental and leasing	$423,292	$1,014,594	$1,437,886
517	Private households	$0	$1,408,654	$1,408,654
422	Software publishers	$213,573	$1,141,539	$1,355,112
505	Car washes	$121,490	$1,187,615	$1,309,105

IMPLAN Sector	Description	Indirect	Induced	Total Secondary
408	Air transportation	$196,820	$1,064,592	$1,261,412
174	Pharmaceutical preparation manufacturing	$341,929	$882,203	$1,224,132
443	General and consumer goods rental except video tapes and discs	$199,442	$985,742	$1,185,184
467	Investigation and security services	$516,747	$616,839	$1,133,586
488	Performing arts companies	$55,731	$1,037,606	$1,093,337
484	Residential mental retardation, mental health, substance abuse and other facilities	$0	$1,040,168	$1,040,168

Source: TNDG IMPLAN analysis.

Appendix C. Economic Vitality Strategic Conditions, for Cities and Other Selected Entities

Economic Vitality Strategic Conditions / Places and Other Selected Entities Table heading notes: 1. Refers to the Ventura County Comprehensive Economic Development Strategy; 2. Refers to the Los Angeles County Economic Development Corporation	Ventura Co. (CEDS)[1]	Camarillo	Fillmore	Moorpark	Ojai	Oxnard	Port Hueneme	Santa Paula	Simi Valley	Thousand Oaks	Ventura City	LA County	LA EDC[2]	CSU Econ Outlook
SWOT Highlights														
Strengths														
Ventura County is the smallest of the counties in the LA five-county area, in population, but is home to a broad array of industries													X	
Proximity to one of the world's leading wine growing regions and 43 miles of coastline attracts large numbers of visitors													X	
Ventura County is a shipping hub for automobiles and agricultural goods.													X	
Large pharmaceuticals industry cluster	X													
Large health care employee base	X													
Large, diversified manufacturing sector	X													
Preferred location for high-tech businesses		X												
High-value agricultural production	X													
Low business tax and low square footage costs				X					X					
Modern industrial buildings		X												
No utility tax		X							X					
Excellent highway and passenger-rail access	X								X					
Close proximity to Burbank and Los Angeles International Airports, in addition to Port Hueneme		X		X					X					
Access to a large and diversified labor force	X								X					
Highly educated workforce		X												

Economic Vitality Strategic Conditions / Places and Other Selected Entities Table heading notes: 1. Refers to the Ventura County Comprehensive Economic Development Strategy; 2. Refers to the Los Angeles County Economic Development Corporation	Ventura Co. (CEDS)[1]	Camarillo	Fillmore	Moorpark	Ojai	Oxnard	Port Hueneme	Santa Paula	Simi Valley	Thousand Oaks	Ventura City	LA County	LA EDC[2]	CSU Econ Outlook
Excellent quality of life; beautiful and varied landscape throughout the region; nature trails; and beautiful parks	X			X					X					
Close access to educational facilities such as 2-year community colleges, and 4-year universities such as Cal Lutheran University and the California State Universities of Northridge and Channel Islands	X	X		X					X					
Good schools				X										
Perennially ranked by the FBI as one of the safest cities in the nation		X		X					X					
Major iconic attraction – Ronald Reagan Library & Museum									X					
High median-income and disposable income levels attract retailers	X			X					X					
Strong business base upon which to build new business									X					
Infrastructure capacity	X			X					X					
Responsive City Council									X					
Streamlined permitting		X												
The water supply available to the Calleguas Municipal Water District is more than adequate to accommodate projected growth in Thousand Oaks (Thousand Oaks General Plan Housing Element 2014-2021 Update), as is wastewater treatment capacity.										X				
Port Hueneme has the most affordable housing and broadest mix of dwellings in all of Ventura County							X							

Economic Vitality Strategic Conditions / Places and Other Selected Entities Table heading notes: 1. Refers to the Ventura County Comprehensive Economic Development Strategy; 2. Refers to the Los Angeles County Economic Development Corporation	Ventura Co. (CEDS)[1]	Camarillo	Fillmore	Moorpark	Ojai	Oxnard	Port Hueneme	Santa Paula	Simi Valley	Thousand Oaks	Ventura City	LA County	LA EDC[2]	CSU Econ Outlook
The Port is an import/export station for break-bulk, neo-bulk, and dry-bulk cargo, serves as a staging area for offshore oil operations, provides space for local sport and commercial fishing industries, and is home to the largest dockside refrigeration storage facility on the West Coast; also has U.S. Customs Port of Entry and Foreign Trade Zone designations.	X						X							
Weaknesses									X					
Low population density and small trade area				X										
Bedroom community				X										
High housing costs				X										
Overbuilt commercial				X										
Lack of hotel				X										
County has not yet recovered to 2007 employment levels	X													
Unemployment rates exceed state averages in several cities	X													
Office space vacancies continue to be high	X													
Lack of fiber optic cable in many parts of the county	X													
Limited container capacity at the Port of Hueneme	X													
No commercial service airport	X													
Regional transit system not well developed	X													
City viewed as a suburban oasis, an ideal location for raising a family; Success of City's business community not well known to outside business collective									X					
Perception of cumbersome permitting process									X					

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The City's key industrial and automotive sectors are not visible to potential consumer and business travelers on the 118 Freeway									X					
Limited ability for industrial development (landlocked)									X					
Few vacant buildings									X					
City lacks industrial inventory in the 10,000 square foot range for large employers	X								X					
Aging industrial buildings could be seen as less appealing when comparing newer industrial buildings clustered along the 101 Southbound and Northbound Freeway	X								X					
Lack of affordable workforce housing	X								X					
Budget constraints affecting the Simi Valley Unified School District may cause concern for businesses looking to relocate employees									X					
Many residents presently earn incomes significantly below the regional median								X						
Opportunities									X					
Health care projected to continue to grow fast	X													
Medical Center complex in City of Ventura	X													
Growth in manufacturing exports and local manufacturing jobs – compete on quality	X													
WIB participation in Southern California Advanced Manufacturing Partnership	X													
Proximity to naval bases provides opportunity to supply defense materials and engage in technology transfer	X													

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Burgeoning farm-to-fork movement can help to expand urban agriculture	X													
Expand business acceleration programs in the county such as Ventura Ventures Technology Center and California Lutheran University's co-working and business incubation center to broaden the benefit to new businesses in terms of services and resources available	X													
Clean/Green industries with focus on Energy/Recycling; Building/Design; Agriculture/Tourism	X													
Expand filming industry	X													
Increase public/private sector collaboration for investment in early child education as a long-term economic strategy	X													
Expand the City's reputation as a place where industry can and does thrive Relationship building - Enhancing communications among businesses in the community									X					
Collaborate with the Ventura County Workforce Investment Board, Simi Valley Chamber of Commerce, and the East County Jobs and Career Center to raise workforce education levels and skills training to meet the emerging sectors in the manufacturing environment									X					
Develop effective channels to market the free and low-cost services of Partner Agencies, valuable benefits that can assist all sizes and types of businesses									X					
Further develop partnerships with higher educational institutions to enhance economic vitality									X					

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Increase visibility of Simi Valley's "business friendly" environment with implementation of a marketing campaign and development and delivery of advertising material									X					
Expanding the City's fiber optic network with all future road construction and street resurfacing in commercial and industrial zones, in efforts to enhance both business retention and recruitment									X					
Attracting potential consumers, business owners, and job seekers within the vehicle trip market while traveling along the 118 Freeway									X					
Despite recent negative growth in the County's labor force, the labor market is still improving														X
Employment in the County's Leisure and Hospitality sector has experienced a strong rebound; the County is an alternative to the higher priced Santa Barbara region, and also benefits from proximity to Los Angeles County														X
There is a healthy potential for future hotel development, with planned projects picking up a good share of the near- to mid-term demand.				X										
Threats														
Continued automation and other technology advances will shift the character of manufacturing jobs	X													
e-commerce challenges to traditional retailing				X										
Changes in warehousing and logistics (automation)				X										
Demographic changes (aging and other)				X										
The sharing economy				X										

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Short-term business leases				X										
Groundwater depletion continues to be a concern for both agricultural and urban water users.	X													
Federal health care program creates uncertainties as health industry tries to expand	X													
Los Angeles and Santa Barbara exert strong competition for businesses and talent pool	X													
Biotech industries face regulatory and market challenges	X													
Increasing traffic on Hwy 101 creates commuter problems	X													
Aging workforce and increasing Boomer retirements will create gaps in knowledge base of available workers in the future	X								X					
Shortage of farm labor	X													
Fiscal ability to replace skilled [government] staff as employees retire									X					
Not responding to the need to market and enhance the City's image will provide a greater advantage for other local municipalities who also have access to major highway corridors									X					
Reduced sales tax and funding for the City will lessen the City's ability to continue excellent public service									X					
Intrusion of non-industrial users in industrial facilities limits the ability for manufacturing and/or mechanical type businesses to lease vacant space and generate significant sales tax revenue as well as create good paying jobs									X					

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Larger Industrial inventory exceeding 100,000 square feet prove to be more difficult to lease and therefore remain vacant for longer periods of time									X					
On a broader level, continued economic uncertainty for business owners leads to slow growth and reduced consumer spending									X					
Political and business-related policies and legislation by the State of California further erodes business growth and cities' ability to govern and provide economic development strategies				X					X					
In contrast to California's growing labor force, Ventura County's labor force has experienced negative year-over-year growth for most of the last three years, the main culprit being the relatively higher cost of living in Ventura County.														X
Employment in the County's Retail Trade sector has experienced negative year-over-year growth for the last few months; clothing shop employment has declined at double-digit rates since the end of 2015. This trend suggests that consumer spending, and therefore confidence, in Ventura County is deteriorating														X
There is an estimated 280,000 SF of vacant retail space in Moorpark, and estimated 20-year supply				X										
Due to land use and land supply constraints, and being a relatively high-cost location to conduct business, there is concern that the County may not be able to accommodate many new large scale businesses or might not be competitive with other locations	X													

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Due to the lack of diversity of goods and non-competitive prices offered by Santa Paula retailers compared to others within the Ventura region, many residents shop outside the community.								X						
The City of Santa Paula is relatively compact, and there are few undeveloped areas within the City								X						
There are multiple, major, recent legislative mandates (and other non-governmental conditions) affecting local farmers, processors, and shippers that are making them question [the viability of] their operations on the Oxnard plain						X								
Strategic Considerations/Focus														
Responsive and Effective Government: shifting city government culture to one that values passion, fun, new ideas, collaboration, risk taking, and empowerment											X	X		
[Focus on] Tourism, Retail, and Quality of Life											X			
Entrepreneurship and Economic Gardening -- taking advantage of assets, programs etc. largely in place											X			
Healthcare and Biomedical. Lack higher education institution for medical research and collaboration											X			
Manufacturing: Challenges include lack of suitable industrially zoned land, and space; lack of executive housing; lack of fiber optic cables; lack of a nearby airport and transit connection											X			
Regional Agriculture and Food: Need streamlined, small scale system to bring locally grown food to schools, institutions, and markets											X			

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"Indirect development," which involves increasing demand for locally provided goods and services by increasing the population of wealthy customers, including providing specialty medical services and housing etc. to the aging population											X			
Invest in our people to provide greater opportunity												X		
Strengthen our leading export-oriented industry clusters												X		
Accelerate innovation and entrepreneurship												X		
Remove barriers to critical infrastructure development, financing and delivery												X		
Increase global connectedness												X		
Build more-livable communities												X		
Goals for Economic Development: 1. Ensure diversity, vitality, and economic balance			X						X					
2. Create new full-time jobs that have pay ranges equal to or above the national average									X					
3. Enhance the City's tax revenue base									X					
4. Promote Simi Valley through effective marketing									X					
5. Strengthen Simi Valley Town Center									X					
6. Analyze the impact of non-industrial users in industrially zoned areas of Simi Valley									X					
7. Address DURT in Simi Valley (delay, uncertainty, regulation, and taxes)									X					
8. Increase Fiber Optic Availability									X					
9. Expand the level of tourism via the Tourism Marketing District									X					

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10. Market on-line permitting system for obtaining simple permits and continue to enhance the City's website									X					
Goals for Economic Development: 1. Promote regional collaboration among jurisdictions and economic stakeholders throughout the County and with state and regional partners outside the County	X													
2. Support retention and expansion of key industry clusters.	X													
3. Reduce unemployment and under-employment through well targeted workforce development programs designed to improve work readiness and create the labor force of choice in Ventura county.	X													
4. Improve regional infrastructure including water resource management, transportation, and broadband.	X													
5. Promote a sustainable balance of employment opportunities, housing choices, agricultural production, open space, and cultural and natural resources, consistent with City vision	X		X			X				X				
Encourage the development of industrial areas for clean industry			X											
People outside the County don't perceive Ventura County as a distinct place. In response, the WIB and others developed the Ventura County Grows Business public relations program and website (www.VenturaCountyGrowsBusiness.com), which needs additional support	X													
Ventura County has a highly trained workforce and a relatively highly skilled job base, but mechanisms are needed to help	X													

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transition talented workers into new business opportunities in the County, if major corporate downsizings occur														
The military bases in Ventura county directly support an estimated 17,000 armed forces and civilian jobs. A number of private firms work closely with the military to research and develop new systems; yet many other manufacturing and technology companies in Ventura County find it difficult to gain access to these opportunities	X													
Ventura County ranked 7th in the nation for the share of local GDP generated by export trade (by 2010), at $6.2 billion. The Port of Hueneme also has a Foreign Trade Zone and is a member of the World Trade Center Association, which could be more widely utilized by businesses in the County than it is currently.	X													
As of 2012, Ventura ranked last among all the California coastal counties in share of the economy supported by travel spending. There are several sub-regional Tourism Business Improvement Districts (TBIDs) in the County that are pursuing expanded marketing programs.	X													
Ventura county's location near Hollywood and the San Fernando Valley, and its numerous scenic and historical sites, make it a natural location for filming activity. However, location specialists have routinely reported that filming is difficult in Ventura County owing to insufficient dedicated capacity to aid communication between local communities and production.	X													

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Ventura County is part of a 3-county Regional Broadband Consortium with Santa Barbara and San Luis Obispo Counties to address deficiencies in broadband capacity in many communities	X													
As an agricultural county, Ventura places high demand on its water resources. Sea water intrusion occurs on the Oxnard Plain and will continue to be an issue as increasing urban water demand affects groundwater basins, along with agricultural use.	X													
Heavy commuter traffic occurs among the cities and from Ventura County to destinations in LA County. Dispersed land use (partly due to SOAR) also creates challenges in designing a viable, efficient transit system. The Ventura County Comprehensive Transportation Plan identifies severe funding constraints due to a lack of a dedicated funding source, as other So. California counties have. Most of the federal funds that do come to the County are for transit purposes only, which is little used in the County.	X													
Several studies in Ventura County have documented an enduring gap between the number children who need some form of early or after-school care and the number of licensed child care and early child education slots available.	X													
[Focus on] Low impact development, jobs-housing balance and preservation of community character					X									
Consider the effects of land use proposals and decisions on efforts to maintain an appropriate jobs-housing balance ratio						X								

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Diverse businesses are needed to provide goods and services to residents and other businesses so that retail spending does not "leak" from the City.								X						
Employment opportunities need to be expanded. Over 7,000 residents commute to another place to work. This pattern contributes to the sales tax leakage problem.								X						
Goal: To develop appropriate additional tools enabling commercial, industrial and residential development to flourish in an efficient and compatible manner										X				
The City shall continue to encourage light industries that are highly specialized, scientific or research-oriented										X				
Target marketing: wineries and bio-tech						X								
Oxnard is uniquely poised to take a leading role in sustainable living and development						X								
Develop a Climate Action and Adaption Plan that implements requirements adopted by the California Air Resources Board and/or the Ventura County APCD						X								
Support the creation of a local green business council that provides information exchange and promotes sustainable business practices that balance environment, equity, and economy						X								
The City takes great pride in its consumer service practices and personifies the concept of "customer as client"							X							
County's transportation infrastructure needs to be addressed, by passing 1/2 Cent Sales Tax Increase Initiative (Chamber)					X									

Source: Various websites and documents; TNDG