

Orange County Growth Industry Cluster Profiles: Ranked (2003) by Size of Employment, 1991-2003

Size:	Employment Cluster	1991	1993	1994	2000	2001	2002	2003 Q3	Average Weekly Wage 2003 Q3	EWS (Apr.04) EWS Projected 2002-07	EWS (Apr.04) % Change 2002-2007
1	Large Sized Employment Clusters, over 100,000 Employees:										
	Business & Professional Services	101,995	98,188	98,056	137,922	137,332	145,432	151,974	\$796	46,679	30.7%
	Tourism	124,686	125,491	124,907	148,064	140,514	142,105	144,709	\$340	21,034	14.5%
2	Medium Sized Employment Clusters, 50,000 - 100,000 Employees:										
	Health Services	67,754	69,551	69,766	75,403	87,277	90,680	96,501	\$792	20,405	21.1%
	Construction	46,813	37,295	37,908	60,159	80,785	80,229	86,499	\$878	20,599	23.8%
3	Small Sized Employment Clusters, less than 50,000 Employees:										
	Biomedical	24,468	25,844	25,259	28,216	29,838	27,949	27,015	\$1,111	1,257	4.7%
	Computer Hardware & Electronics	41,975	37,010	37,006	44,954	36,719	30,869	23,078	\$1,160	3,836	16.6%
	Computer Software	10,586	10,855	11,631	31,937	24,993	20,894	20,539	\$1,473	17,176	83.6%
	Communications	12,444	12,886	13,323	22,860	25,358	23,598	20,522	\$1,092	8,205	40.0%
	Defense & Aerospace	40,603	28,204	27,022	22,970	26,343	19,488	18,992	\$1,358	-5,720	-30.1%
	Energy & Environment	11,126	10,940	11,193	12,841	18,519	15,896	13,366	\$873	1,193	8.9%
Cluster Totals:		482,450	456,264	456,071	585,326	607,678	597,140	603,195	\$777	134,664	22.3%
Orange County Total Private Employment		1,020,000	992,200	997,300	1,248,000	1,272,600	1,250,700	1,288,776	\$807		
Cluster Percent County Private Employment:		47.3%	46.0%	45.7%	46.9%	47.8%	47.7%	46.8%	96.3%		2001-2008
Orange County Total Employment:		1,160,400	1,142,600	1,130,700	1,405,200	1,412,200	1,417,700	1,424,609	\$812		15.1%

EDD Proj. Dec.2003

Sources: OCWIB Early Warning System (EWS), with OCBC analysis and Updated Cluster definitions, June 24, 2004
 3rd Quarter 2003 Data Source: 'Quarterly Census of Employment and Wages (QCEW)',
 (The QCEW are not official EDD estimates and the above cluster totals do not include public or self employed)
 Edd/LMID web site: <http://www.calmis.ca.gov/file/ES202/CEW-Select.htm>
 Note: 'EWS 4.14.04' 2002-7 Conservative 1.9% State five year growth forecast is used, processed for OCWIB April 14, 2004.

Orange County Growth Industry Clusters, July-September, 2003
Ranked by Employment Size and Average Wages

Size	Growth Industry Cluster Clusters	Average Monthly Employment July-Sept. 2003	Average No. Employees/ Business July Sept. 2003	Number of Establishments July-Sept. 2003	Total Payroll, 3rd Qtr 2003 (\$1,000) July-Sept. 2003	Average Weekly Wage July-Sept. 2003
1	Large Sized Employment Clusters, over 100,000 Employees:					
	Business & Professional Services	151,974	13.8	10,975	\$1,571,698	\$796
	Tourism	144,709	24.6	5,871	\$640,282	\$340
2	Medium Sized Employment Clusters, 50,000 - 100,000 Employees:					
	Health Services	96,501	13.2	7,309	\$994,194	\$792
	Construction	86,499	12.9	6,680	\$986,950	\$878
3	Small Sized Employment Clusters, less than 50,000 Employees:					
	Biomedical	27,018	25.4	1,063	\$390,124	\$1,111
	Computer Hardware & Electronics	23,078	42.0	550	\$348,134	\$1,160
	Computer Software	20,539	8.5	2,426	\$393,185	\$1,473
	Communications	20,522	34.3	599	\$291,436	\$1,092
	Defense & Aerospace	18,992	39.1	486	\$335,357	\$1,358
	Energy & Environment	13,687	28.2	486	\$155,300	\$873
	Orange County Cluster Totals:	603,519	16.6	36,445	\$6,106,660	\$778
	Orange County Private Industry Totals:	1,288,776	14.9	86,718	\$13,525,277	\$807
	Cluster Percent of County Private Industries:	46.8%	111.4%	42.0%	45.1%	96.4%
	O.C. Private & Government Industry Totals:	1,424,609	16.2	88,096	\$15,042,831	\$812

Sources: 1. Growth Industry Cluster Definitions (NAICS 2002), Orange County Business Council, June 24, 2004.

2. 'Census of Employment and Wages, 3rd. Quarter 2003', California EDD/LMID, May 18, 2004

EDD Web Site: www.calmis.ca.gov/file/ES202/CEW-Select.htm

(The QCEW are not official EDD estimates and **the above clusters** do not include public or self employed)

3. Orange County Workforce Investment Board Staff Analysis.

**Orange County Growth Industry Cluster Profiles:
Top Five Employing Industries within each Cluster, July-September, 2003.**

Large Sized Employment Clusters, over 100,000 Employees:							
NAICS 1997 Industry Code	Professional & Business Services Cluster Top Five Employers by Industry Code Description	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003	
561320	Temporary Help Services	43,463	115.3	377	\$220,655	\$391	
541110	Offices of Lawyers	12,799	5.9	2,185	\$218,529	\$1,313	
561330	Professional Employer Organizations	12,623	107.9	117	\$89,301	\$544	
541330	Engineering Services	11,767	12.8	917	\$206,920	\$1,353	
541810	Advertising Agencies	5,516	17.9	308	\$90,720	\$1,265	
	Total for all Cluster Businesses July-Sept.2003:	151,974	13.8	10,975	\$1,571,698	\$796	
NAICS 2002 Industry Code	Tourism Cluster Top Five Employers by Industry Code Description	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003	
722110	Full-Service Restaurants	53,825	26.0	2,072	\$219,222	\$313	
722211	Limited-Service Restaurants	36,123	16.2	2,228	\$123,515	\$263	
713110	Amusement and Theme Parks	20,501	1,366.7	15	\$111,055	\$417	
721110	Hotels (except Casino Hotels) and Motels	19,813	48.7	407	\$114,280	\$444	
722213	Snack and Nonalcoholic Beverage Bars	5,450	11.6	468	\$17,226	\$243	
	Total for all Cluster Businesses July-Sept.2003:	144,709	24.6	5,871	\$640,282	\$340	
Note: The QCEW are not official EDD estimates and the above does not include public or self employed.							
Edd/LMID web site: http://www.calmis.ca.gov/file/ES202/CEW-Select.htm							

**Orange County Growth Industry Cluster Profiles:
Top Five Employing Industries within each Cluster, July-September, 2003.**

Medium Sized Employment Clusters, 50,000 - 100,000 employees:							
NAICS 2002 Industry Code	Health Services Cluster Top Five Employers by Industry Code Description	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003	
622110	General Medical and Surgical Hospitals	27,836	515.5	54	\$293,642	\$811	
621111	Offices of Physicians (except Mental Health)	21,617	7.4	2,916	\$311,576	\$1,109	
621210	Offices of Dentists	10,496	5.5	1,911	\$92,549	\$678	
623110	Nursing Care Facilities	7,741	89.0	87	\$52,146	\$518	
621610	Home Health Care Services	3,555	33.9	105	\$29,822	\$645	
	Total for all Cluster Businesses July-Sept.2003:	96,501	13.2	7,309	\$994,194	\$792	
NAICS 2002 Industry Code	Construction Cluster Top Five Employers by Industry Code Description	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003	
236115	New single-family general contractors	6,942	9.0	770	\$106,818	\$1,184	
561110	Office administrative services	6,789	11.1	610	\$84,962	\$963	
236220	Commercial building construction	6,564	14.2	463	\$88,642	\$1,039	
238212	Nonresidential electrical contractors	6,343	15.3	414	\$74,245	\$900	
238221	Residential plumbing and HVAC contractors	4,877	11.0	445	\$51,199	\$807	
	Total for all Cluster Businesses July-Sept.2003:	86,499	12.9	6,680	986,950	\$878	
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**Orange County Growth Industry Cluster Profiles:
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Small Sized Employment Clusters, less than 50,000 Employees:							
NAICS 2002 Industry Code	Biomedical Cluster Top Five Employers by Description	Top Five Industry Code	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
325412	Pharmaceutical Preparation Manufacturing		4,577	130.8	35	\$70,387	\$1,183
541710	Physical, engineering and biological research		3,585	14.3	251	\$66,424	\$1,425
334514	Analytical Laboratory Instrument manufacturing		3,258	148.1	22	\$50,438	\$1,191
541940	Veterinary Services		3,155	13.1	240	\$21,899	\$534
339112	Surgical and medical instrument manufacturing		2,768	50.3	55	\$32,555	\$905
	Total for all Cluster Businesses July-Sept.2003:		27,018	25.4	1,063	\$390,124	\$1,111
NAICS 2002 Industry Code	Communications Cluster Top Five Employers by Code Description	Industry	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
517310	Telecommunications resellers		8,675	39.8	218	\$126,499	\$1,122
517211	Paging		2,128	39.4	54	\$28,992	\$1,048
334220	Broadcast and wireless communications equip.		1,449	46.7	31	\$22,494	\$1,194
517410	Satellite telecommunications		1,212	33.7	36	\$16,058	\$1,019
334418	Printed circuit assembly manufacturing		1,200	32.4	37	\$9,741	\$624
	Total for all Cluster Businesses July-Sept.2003:		20,522	34.3	599	\$291,436	\$1,092
NAICS 2002 Industry Code	Computer Hardware & Electronics Cluster Top Five Employers by Code Description	Industry	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
334413	Semiconductor and Related Device Manufacturing		4,885	78.8	62	\$110,372	\$1,738
335129	Other Lighting Equipment Manufacturing		4,075	40.0	102	\$45,427	\$857
334119	Other Computer Peripheral Equipment Manufacturing		2,282	58.5	39	\$30,973	\$1,044
335122	Commercial, Industrial, and Institutional Electronics		1,739	35.5	49	\$20,573	\$910
334310	Audio and Video Equipment Manufacturing		1,673	76.0	22	\$26,563	\$1,221
	Total for all Cluster Businesses July-Sept.2003:		23,078	42.3	481	\$316,147	\$1,160
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Small Sized Employment Clusters, less than 50,000 Employees:							
NAICS 2002 Industry Code	Computer Software Cluster Top Five Employers by Code Description	Industry	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
541511	Custom Computer Programming Services		7,664	7.1	1,075	\$137,168	\$1,377
541512	Computer Systems Design Services		6,119	7.5	818	\$122,983	\$1,546
511210	Software Publishers		3,634	26.1	139	\$81,071	\$1,716
518111	Internet Service Providers		1,703	11.3	151	\$26,704	\$1,206
541519	Other Computer Related Services		1,110	5.7	194	\$19,756	\$1,369
	Total for all Cluster Businesses July-Sept.2003:		20,539	8.5	2,426	\$393,185	\$1,473
NAICS 2002 Industry Code	Defense & Aerospace Cluster Top Five Employers by Code Description	Industry	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
334511	Search, Detection, Navigation, Guidance Instruments		8,878	286.4	31	\$188,402	\$1,632
336413	Other Aircraft Parts and Auxiliary Equipment		4,103	51.9	79	\$46,179	\$866
541710	R & D in the Physical, Engineering & Biological Sciences		3,516	15.4	229	\$65,355	\$1,430
336412	Aircraft Engine and Engine Parts Manufacturing		760	69.1	11	\$14,214	\$1,439
336411	Aircraft Manufacturing		650	54.2	12	\$10,561	\$1,249
	Total for all Cluster Businesses July-Sept.2003:		18,992	39.1	486	\$335,357	\$1,358
	Note: (NA) Confidentiality requirements require payroll data for too few largest employers not be published						
NAICS 2002 Industry Code	Energy & Environment Cluster Top Five Employers by Industry Code Description	Industry	Total Employees by Industry 3Q 2003	Average Number of Employees /Business	Total Establishments	Payroll (\$1,000) 3Q 2003	Average Weekly Income 3Q 2003
339112	Surgical & medical instrument mfg		2,627	49.6	53	\$33,069	\$968
334513	Industrial process variable instruments		2,196	41.4	53	\$28,952	\$1,014
336399	All other motor vehicle parts manufacturing		1,525	43.6	35	\$12,668	\$639
561710	Exterminating & pest control services		1,523	10.7	143	\$14,536	\$734
335311	Electric power and specialty transformer mfg.		1,162	77.5	15	\$12,516	\$829
	Total for all Cluster Businesses July-Sept.2003:		13,687	28.2	486	\$155,300	\$873
	Note: (NA) Confidentiality requirements require payroll data for too few largest employers not be published						
	Note: The QCEW are not official EDD estimates and the above do not include public or self employed.						
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