A stylized map of the Pacific Northwest region, showing the coastlines of Washington, Oregon, California, and Arizona. The map is rendered in a light cream color against a dark blue background. The state names are written in a sans-serif font along their respective borders: 'WASHINGTON' along the top, 'OREGON' along the left, 'CALIFORNIA' along the bottom left, and 'ARIZONA' along the bottom right. The title text is overlaid on the map.

FACTS

ON THE

BASIC ECONOMY

OF THE

PACIFIC

COAST

Foster and Kleiser
— COMPANY —

FOSTER AND KLEISER COMPANY — THE PACIFIC COAST BASIC ECONOMY

OCTOBER, 1943
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Much has been said of the record industrialization of the Pacific Coast, (California, Oregon, Washington, Arizona.)

War Production Board figures for 2½ years of war production, June, 1940 through December, 1942, showed California to lead all other states, with the Pacific Coast accounting for 14.5% (1/7th) of total U. S. war production. (The Pacific Coast produced 6.5% of peacetime manufactures.)

Much has been said also by leading authorities, of the permanent nature of these Pacific Coast industrial gains.

This quotation from Barron's National Business and Financial Weekly is typical (Article—"New Geography of American Business," May 31, 1943, by William Hurd Hillyer).

"The postwar map will show three major industrial areas instead of two:

- 1.—The Atlantic, embracing the eastern seaboard,
- 2.—The Central,
- 3.—*The Pacific, west of the Great Divide.*

"These three regions will be almost evenly matched as to industrial output, though each will top the others in certain definite fields.

THE PACIFIC COAST HAS CERTAIN NATURAL ADVANTAGES

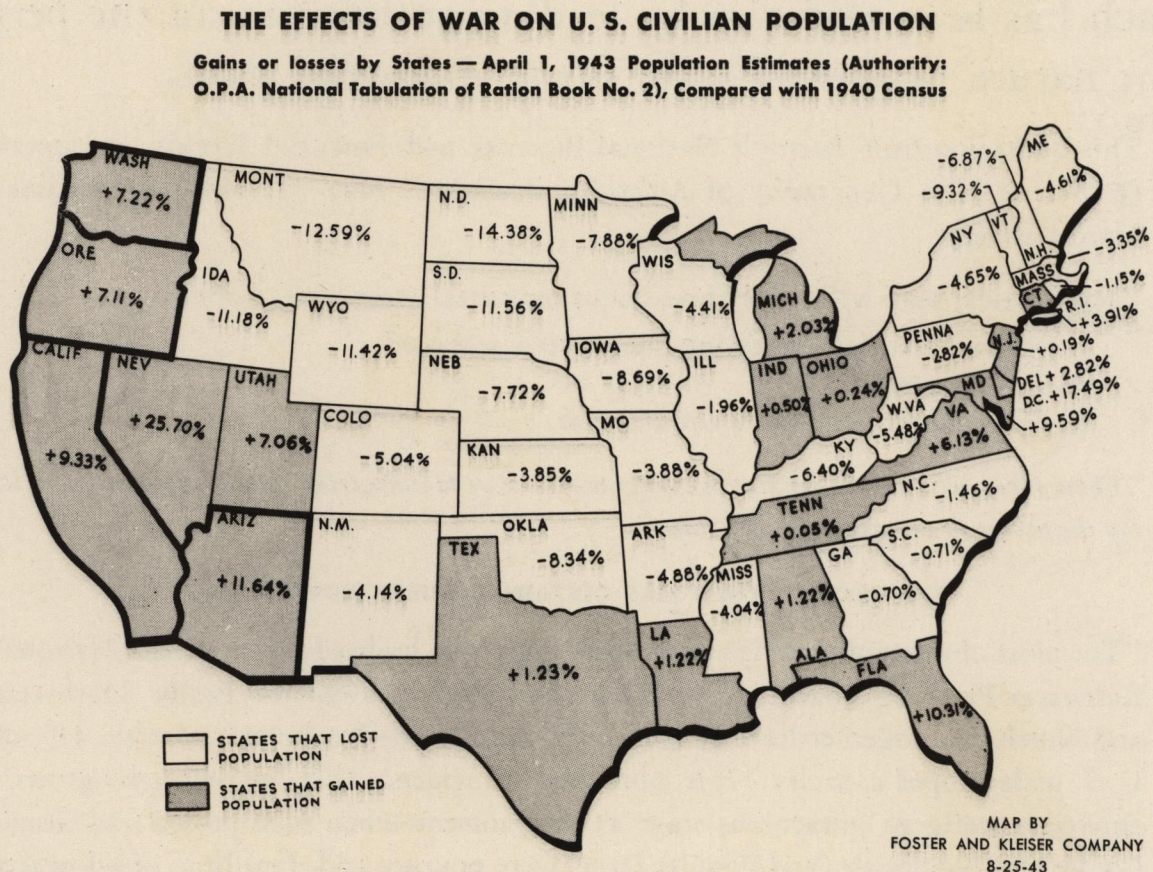
"The most obvious of these is an abundant supply of hydroelectric power. (National Resources Planning Board Studies, December, 1942, showed the Pacific Southwest and Northwest together have 30% of U. S. installed hydroelectric capacity, 44% of U. S. undeveloped capacity.) It is more than coincidence that the industrial growth entered a wellnigh miraculous stage at the moment when such projects as Grand Coulee and Bonneville (and Boulder Dam) were pouring added millions of kilowatts into Pacific Coast power cables, although the primary cause, of course, was the war.

"Possession of hydroelectric power will help the West Coast to hold its gains in all sorts of industry, besides creating fresh myriads of irrigated acres."

Much has been said of the record population increases of the Pacific Coast.

The Pacific Coast has had the greatest increase since 1940 of any section of the U. S.

Here is the national picture:



The question is asked, "Will Pacific Coast population gains be retained in the postwar period?"

Any answer must of course be speculation, but the most authoritative source of population analysis, the U. S. Bureau of the Census, indicates that the answer is substantially, "yes." (The Census Bureau study, "Population Shifts and Income Changes," Jan. 1943, places *every one* of the Coast metropolitan areas that has had rapid wartime growth, in the "should be expected to retain population increments" bracket.) The sound, expanding economy of the Pacific Coast indicated by the facts shown in the following study underlies this growth.

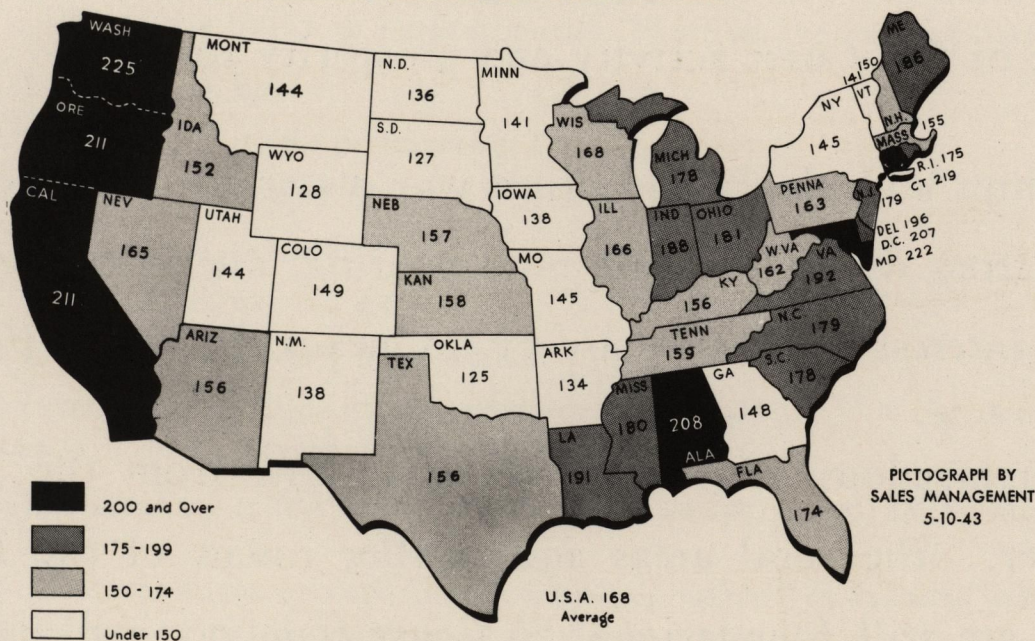
Much has been said of the unusual buying power of the Pacific Coast. The Pacific Coast has had the greatest gains in Effective Buying Income and has the highest Per Capita Retail Sales of any section of the U. S. (These gains in Effective Buying Income are on top of an already high peacetime level.)

EFFECTIVE BUYING INCOME

Gain 1942 over 1939 (1939 = 100)

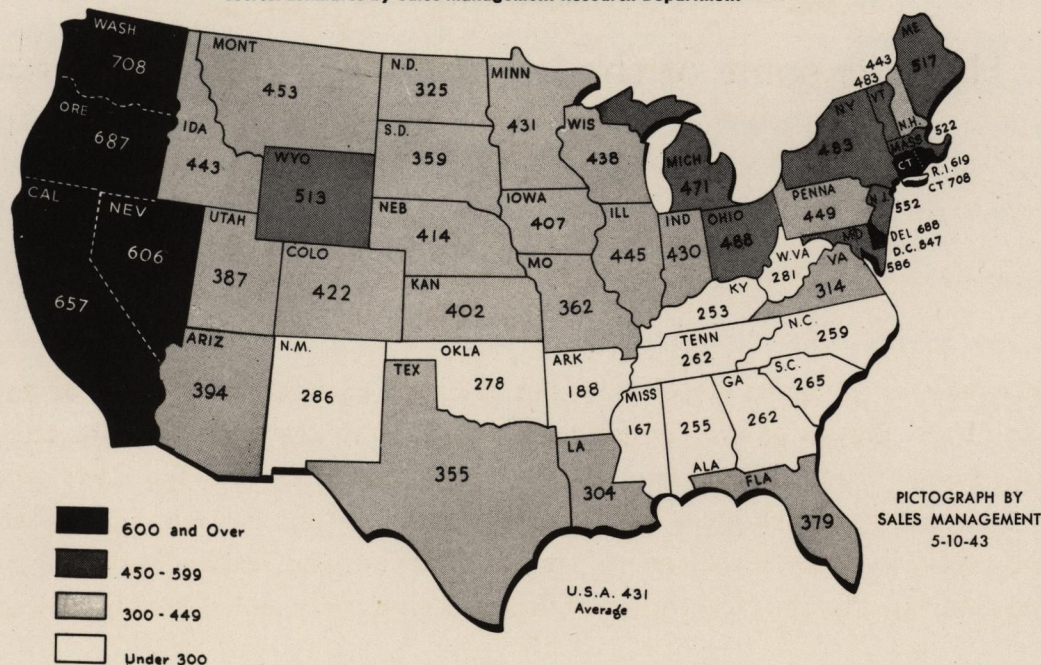
(Incomes for most recent "normal" year, 1939, divided into 1942 totals)

Source: Estimates by Sales Management Research Department



1942 RETAIL SALES PER CAPITA

Source: Estimates by Sales Management Research Department



With the spotlight of national attention focused on the War, it is little wonder that Pacific Coast war production and war production centers have been credited with being wellnigh the whole of this Coast activity and prosperity today.

The ships and planes and other war materials, and the busy cities from which they are now pouring, are focal points of Coast interest—but, they are by no means the whole picture.

The tremendous basic resources that flow from the “back country,” the rural areas and smaller towns of the Pacific Coast are still foundational to Coast economy and are even more vital to Coast and national welfare today than ever before. Here are some of the highlights of these resources . . .

CALIFORNIA, OREGON, WASHINGTON AND ARIZONA PRODUCE:

The greatest comparative farm wealth in the U. S.

Of the 1st 10 U. S. Farm Counties, 9 are on the Pacific Coast

Of the 1st 20 U. S. Farm Counties, 16 are on the Pacific Coast

Of the 1st 100 U. S. Farm Counties, 29 are on the Pacific Coast

2/5 of all U. S. lumber

2/5 of all U. S. gold (in peacetime)

1/3 of all U. S. copper (1/12 of world production)

1/6 of all U. S. petroleum

1/6 of all U. S. natural gas

1/7 of all U. S. silver (in peacetime)

Substantial quantities of other strategic minerals (4/5 of the nation's mercury, 1/4 of the tungsten, for example)

2/5 of total U. S. fish catch (all sources—marine, rivers, lakes, etc.)

These basic resources provide a sound and diversified *foundational economy*, constantly adding to and helping to sustain Coast prosperity.

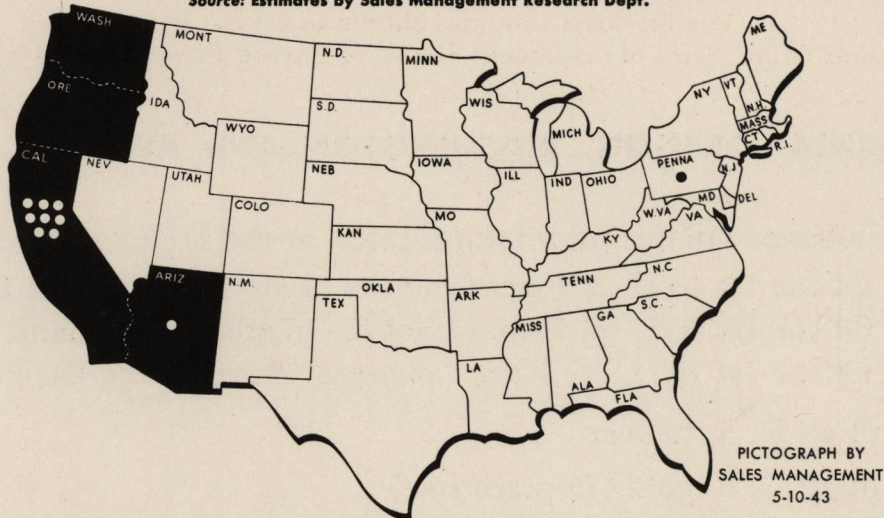
Not only do these resources deliver a substantial yield to prime producers (farmers, lumbermen, miners, fishermen) but they generate an even greater wealth in the packing, processing, manufacturing and distribution of the resultant products. Examples: The great food packing industries; the petroleum refineries and chemical industries; and the forest products industries producing lumber and planing mill products, industrial lumber, plywood, pulp and paper, furniture, wood specialties, cellulose plastics; and others.

Here is the graphic picture of each of these major basic resources:—

1st 10 U. S. FARM COUNTIES IN CASH FARM INCOME

Each dot represents a county which ranks among the first 10 in 1942 cash farm income.

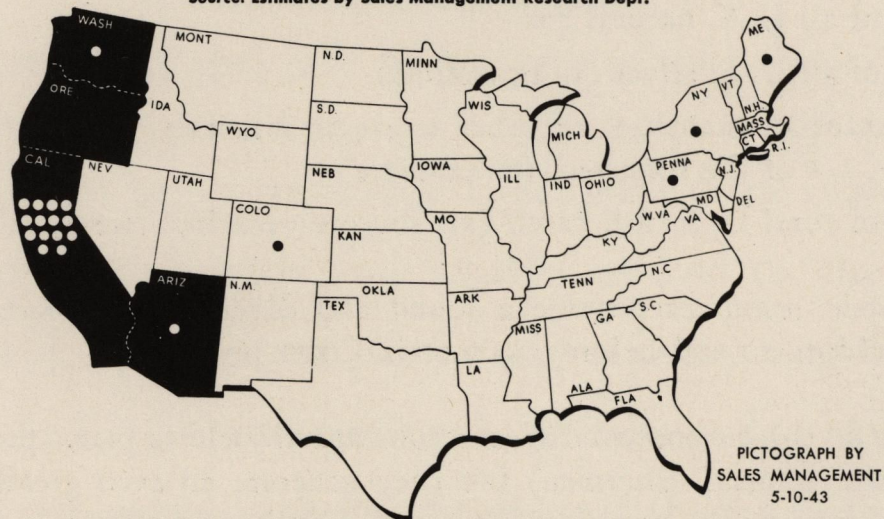
Source: Estimates by Sales Management Research Dept.



1st 20 U. S. FARM COUNTIES IN CASH FARM INCOME

Each dot represents a county which ranks among the first 20 in 1942 cash farm income.

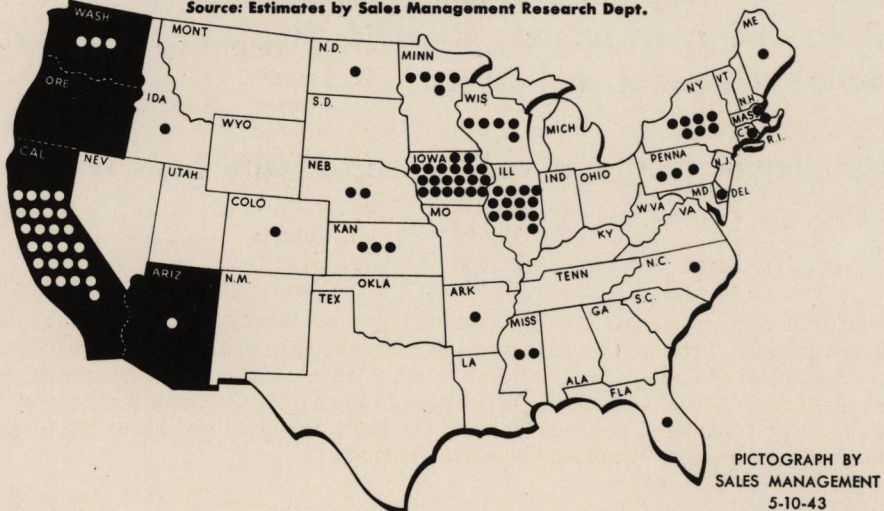
Source: Estimates by Sales Management Research Dept.



1st 100 U. S. FARM COUNTIES IN CASH FARM INCOME

Each dot represents a county which ranks among the first 100 in 1942 cash farm income.

Source: Estimates by Sales Management Research Dept.



RANKING OF TOP 100 FARM COUNTIES IN U. S.

(Gross income from farm marketings plus government benefit payments)

Pacific Coast Counties shown in capital letters

Figures from "Sales Management Survey of Buying Power" May 10, 1943

Rank	County	State	CASH FARM INCOME— 1942 Estimate (in thousands of dollars)	Rank	County	State	CASH FARM INCOME— 1942 Estimate (in thousands of dollars)
1.	LOS ANGELES	CAL.	\$126,034	51.	Sangamon	Ill.	\$21,448
2.	TULARE	CAL.	77,351	52.	Dodge	Wis.	21,018
3.	FRESNO	CAL.	72,769	53.	York	Pa.	20,590
4.	SAN JOAQUIN	CAL.	71,571	54.	Henry	Ill.	20,490
5.	KERN	CAL.	47,708	55.	Middlesex	Mass.	20,266
6.	STANISLAUS	CAL.	47,417	56.	Plymouth	Iowa	20,088
7.	SONOMA	CAL.	46,257	57.	Otter Tail	Minn.	19,908
8.	MARICOPA	ARIZ.	45,742	58.	Martin	Minn.	19,820
9.	SANTA CLARA	CAL.	44,866	59.	Renville	Minn.	19,780
10.	Lancaster	Pa.	43,413	60.	DeKalb	Ill.	19,736
11.	SAN BERNARDINO	CAL.	42,776	61.	Orange	N. Y.	19,637
12.	MONTEREY	CAL.	41,600	62.	Benton	Iowa	19,562
13.	Weld	Colo.	40,865	63.	Sunflower	Miss.	19,428
14.	YAKIMA	WASH.	40,605	64.	Cherokee	Iowa	19,393
15.	VENTURA	CAL.	39,338	65.	Worcester	Mass.	19,341
16.	ORANGE	CAL.	38,690	66.	Clinton	Iowa	19,333
17.	MERCED	CAL.	37,329	67.	Faribault	Minn.	18,985
18.	IMPERIAL	CAL.	37,296	68.	Twin Falls	Idaho	18,922
19.	Aroostook	Maine	34,798	69.	Webster	Iowa	18,768
20.	Suffolk	N. Y.	33,711	70.	Tama	Iowa	18,706
21.	RIVERSIDE	CAL.	33,694	71.	SAN LUIS OBISPO	CAL.	18,467
22.	Sussex	Del.	32,640	72.	Vermillion	Ill.	18,446
23.	Mississippi	Ark.	32,333	73.	Marathon	Wis.	18,375
24.	McLean	Ill.	32,246	74.	St. Lawrence	N. Y.	18,254
25.	SAN DIEGO	CAL.	30,482	75.	Linn	Iowa	18,178
26.	SACRAMENTO	CAL.	29,241	76.	Wright	Iowa	18,178
27.	Dane	Wis.	27,779	77.	Franklin	Iowa	18,084
28.	La Salle	Ill.	27,734	78.	Delaware	N. Y.	17,951
29.	Pottawattamie	Iowa	27,351	79.	Erie	N. Y.	17,837
30.	YOLO	CAL.	26,028	80.	Kane	Ill.	17,709
31.	Champaign	Ill.	25,775	81.	Johnston	N. C.	17,677
32.	SANTA BARBARA	CAL.	25,682	82.	Marshall	Iowa	17,629
33.	Hartford	Conn.	25,398	83.	Dawson	Neb.	17,412
34.	Livingston	Ill.	25,342	84.	KING	WASH.	17,408
35.	WHITMAN	WASH.	25,294	85.	O'Brien	Iowa	17,400
36.	Sioux	Iowa	24,924	86.	Grundy	Iowa	17,377
37.	Polk	Fla.	24,722	87.	Hamilton	Iowa	17,373
38.	Iroquois	Ill.	24,679	88.	Sumner	Kan.	17,348
39.	Kossuth	Iowa	24,409	89.	Crawford	Iowa	17,338
40.	SUTTER	CAL.	23,793	90.	Sedgwick	Kansas	17,328
41.	Woodbury	Iowa	24,641	91.	MADERA	CAL.	17,315
42.	Scotts Bluff	Neb.	23,072	92.	Jasper	Iowa	17,306
43.	KINGS	CAL.	23,041	93.	Storey	Iowa	17,267
44.	SOLANO	CAL.	22,958	94.	Wayne	N. Y.	17,263
45.	Chester	Pa.	22,845	95.	Redwood	Minn.	17,238
46.	ALAMEDA	CAL.	22,305	96.	Christian	Ill.	17,196
47.	Bureau	Ill.	22,104	97.	Reno	Kansas	17,123
48.	Cook	Ill.	21,614	98.	Oneida	N. Y.	17,103
49.	Bolivar	Miss.	21,556	99.	Grant	Wis.	17,059
50.	Cass	N. Dak.	21,469	100.	Fond du Lac	Wis.	17,001

It should be stated that the confines of San Francisco County are identical with San Francisco City Limits (45 square miles). Consequently, very little agricultural production exists in San Francisco County. However, the San Francisco Bay Area (San Francisco, Oakland, Berkeley, Alameda) is to a great extent the financial, processing and distributing hub of agricultural and mining activities of Northern and Central California. Thus, San Francisco and the Bay Area must be considered as a vital part of the basic resources picture of the Coast, even though San Francisco County does not show in "Leading Counties" listings.

COMPARISON OF FARM YIELD BY AREA

Someone may say that the leadership of Pacific Coast counties in volume of farm production is wholly the result of the large size of some of these counties.

Many Coast counties, typical of the West, are large, but their yield is also greater comparatively than leading counties of other important farm states.

For example, Lancaster County, Pennsylvania, (10th in U. S.) is the richest farm county outside the Coast states—(1st 9 are on the Coast).

Lancaster County had a yield in 1942 of \$43,413,000 from its 945 square miles.

San Joaquin County, California (4th County in California) had a yield of \$71,571,000 from its 1,410 square miles.

Or, in other words, San Joaquin County, California, with 49% *more area* delivered 60% *more yield*.

Another example: The leading farm county of Iowa, Pottawattamie, compared with the leading farm county of California, Los Angeles. (Los Angeles County is one of the largest Coast counties.)

Pottawattamie County, Iowa, had a yield in 1942 of \$27,351,000 from its 946 square miles.

Los Angeles County had a yield of \$126,034,000 from its 4071 square miles.

In other words, Los Angeles County with 430% *the area* of Pottawattamie County had 460% *the yield*.

COMPARISON OF FARM YIELD BY AREA (Cont'd.)

A third example: Comparison, leading farm county of Wisconsin, Dane County, with Santa Clara County, California (8th farm county of California).

Dane County, Wisconsin, had a yield of \$27,779,000 from its 1,197 square miles.

Santa Clara, California, had a yield of \$44,866,000 from its 1,305 square miles.

In other words, Santa Clara County with 9% *more area* had 61% *more yield*.

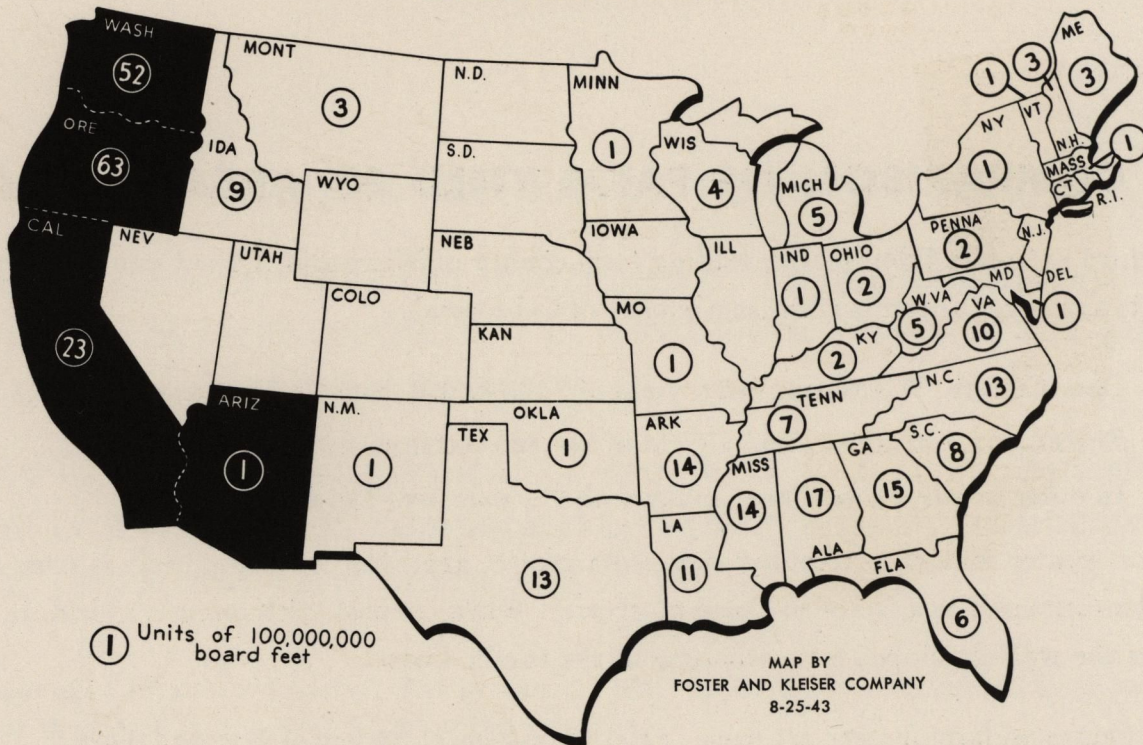
Since greater volume per county represents greater aggregate buying power, it must not be under-estimated as a factor in Coast prosperity. When coupled with intensive yield, it underlines the well-developed farm economy of the Pacific Coast.

All figures on farm income are from "Sales Management Survey of Buying Power."

Foster and Kleiser Company OUTDOOR ADVERTISING delivers the most complete, effective and economical advertising coverage in these leading U. S. farm markets.

LEADING LUMBERING STATES OF THE U. S.

Timber cut, 1941, (latest figures) units of 100,000,000 ft. b.m.
Source: U. S. Census of Forest Products



COMPARISON OF LUMBER PRODUCTION—THE FIVE LEADING STATES

Latest available figures, 1941—from U. S. Bureau of the Census

Rank	State	Production
1	Oregon	6,346,165,000 feet, b.m.
2	Washington	5,239,224,000 feet, b.m.
3	California	2,331,040,000 feet, b.m.
4	Alabama	1,798,383,000 feet, b.m.
5	Georgia	1,522,311,000 feet, b.m.
TOTAL UNITED STATES		33,476,165,000 feet, b.m.

The Pacific Coast—California, Oregon, Washington, Arizona produce 42% of the entire U. S. timber cut. (Total Coast cut, including Arizona—14,046,996,000 feet, b.m.)

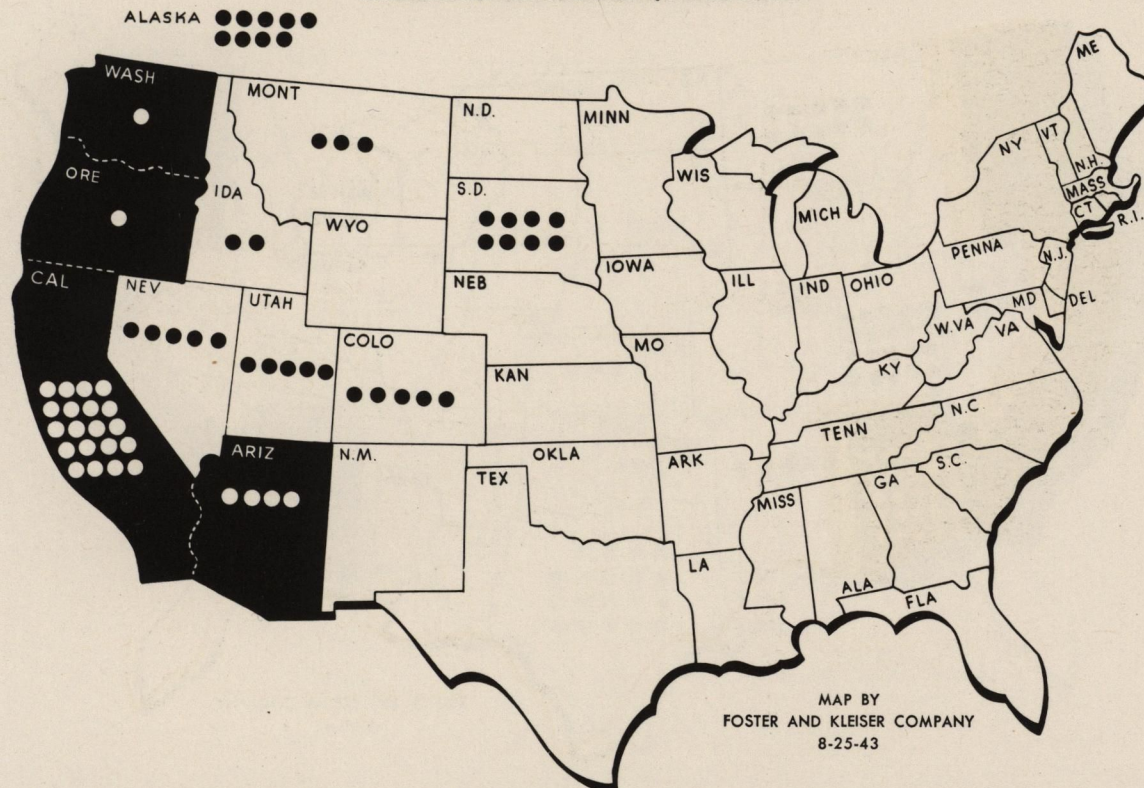
Note: Due to the heavy cut of redwood which brings a substantially higher price than pine, cedar or fir, the California position in dollar lumber income is proportionately better than shown by the production figures above.

Foster and Kleiser Company OUTDOOR ADVERTISING delivers the most complete, effective and economical advertising coverage in this leading U. S. lumber production area.

LEADING GOLD PRODUCING STATES OF THE U. S. (Including Alaska)

Each dot represents \$2,500,000 in gold production, 1941 (latest figures)

Source: Minerals Yearbook, U. S. Dept. of the Interior



COMPARISON OF GOLD PRODUCTION—LEADING STATES (Including Alaska)

Figures from Minerals Yearbook, U. S. Department of the Interior
(1941 Production)

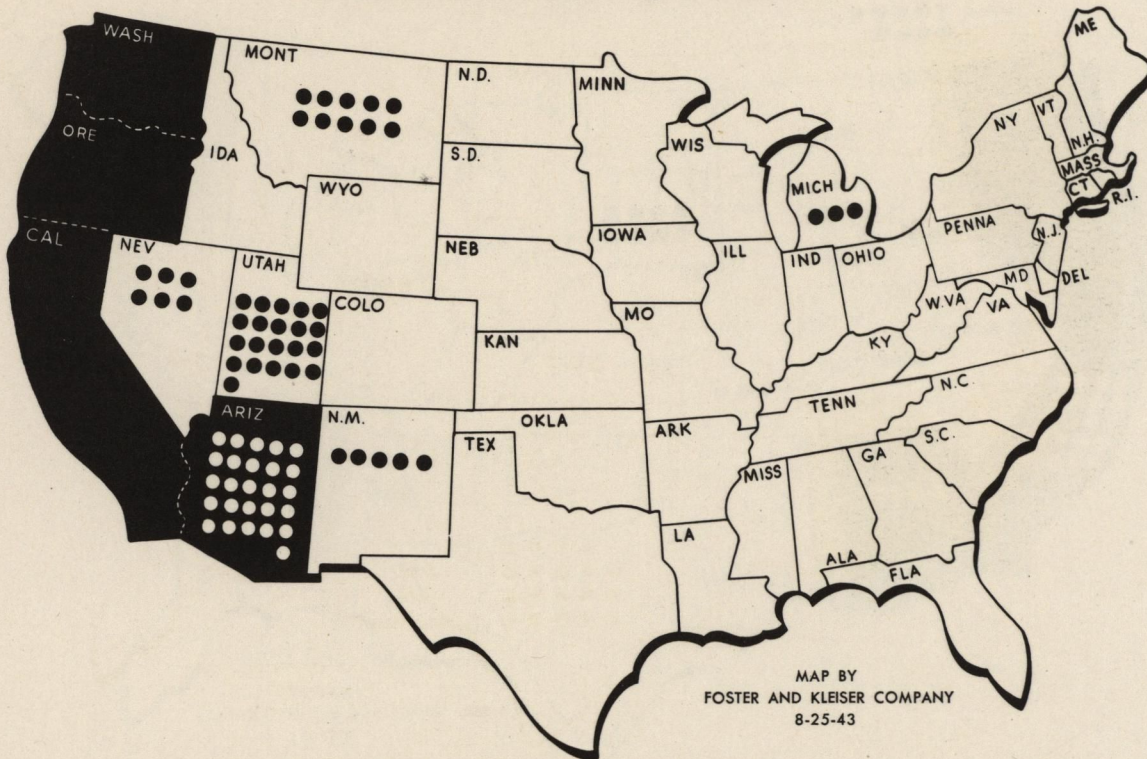
Rank	State	Value of Production
1	California	\$50,107,300
2	Alaska	24,364,000
3	South Dakota	21,415,400
4	Colorado	13,567,000
5	Nevada	13,228,400
6	Utah	13,040,000
7	Arizona	11,108,500
8	Montana	8,843,900
9	Idaho	5,292,400
10	Oregon	3,347,200
11	Washington	2,910,800
TOTAL UNITED STATES AND ALASKA		\$169,123,000

The Pacific Coast—California, Oregon, Washington, Arizona, produces 39.9% (2/5ths) of the total gold of U. S. and Alaska.

Foster and Kleiser Company OUTDOOR ADVERTISING delivers the most complete, effective and economical advertising coverage in this leading U. S. gold producing area.

LEADING COPPER PRODUCING STATES OF THE U. S.

Each dot represents smelter output of 25,000,000 pounds fine, 1941 (latest figures)
Source: Minerals Yearbook, U. S. Dept. of the Interior



COMPARISON OF COPPER PRODUCTION—LEADING STATES

Figures from Minerals Yearbook, U. S. Dept. of the Interior
(1941 Production)

Rank	State	Production
1	Arizona	657,100,101 pounds fine, smelter output
2	Utah	541,293,973 pounds fine, smelter output
3	Montana	257,424,059 pounds fine, smelter output
4	Nevada	161,035,989 pounds fine, smelter output
5	New Mexico	147,696,312 pounds fine, smelter output
6	Michigan	93,503,895 pounds fine, smelter output

TOTAL UNITED STATES

(Including Alaska) 1,932,144,953 pounds fine, smelter output
(Value—\$227,993,000)

The Pacific Coast produces 35.5% of U. S. total. (Arizona—657,100,101 lbs.; California—8,029,066; Washington—17,334,000; Oregon—167,899.)

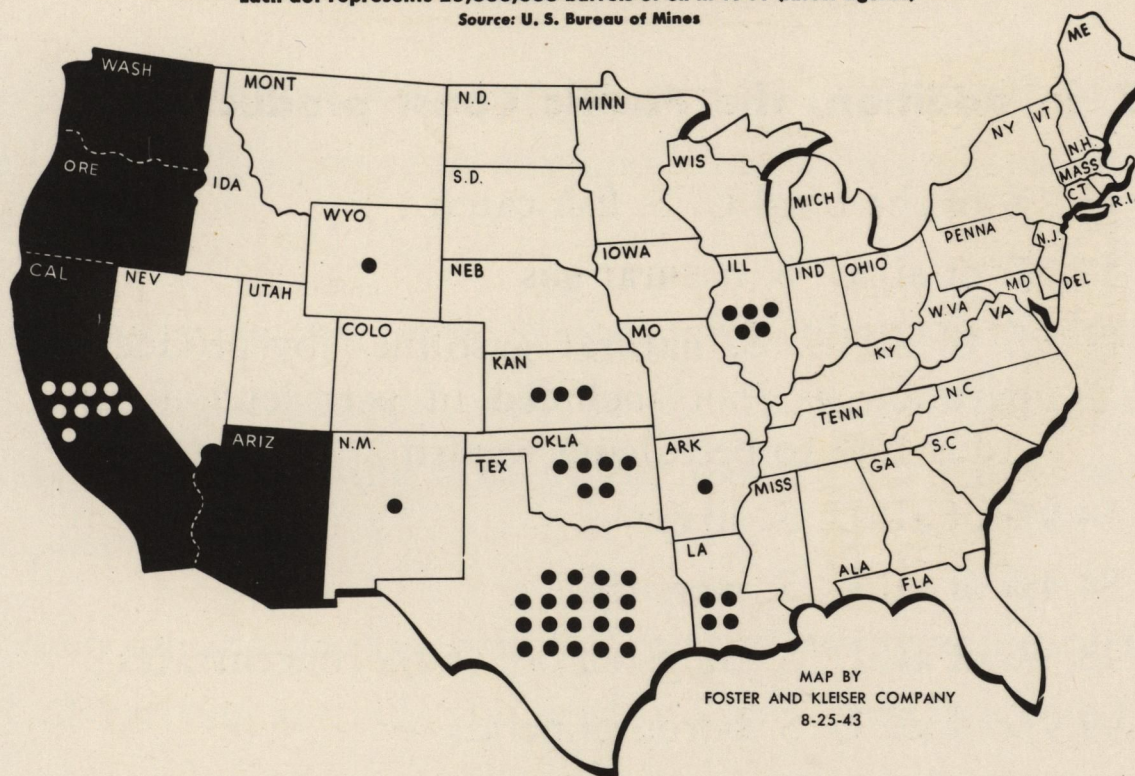
Note: In the last year that international copper production figures were obtained (1938), the U. S. total was slightly in excess of 1/4 of total world production. Arizona, therefore, produces 1/12 of total world production.

Foster and Kleiser Company OUTDOOR ADVERTISING delivers the most complete, effective and economical advertising coverage in this leading U. S. copper production area.

LEADING PETROLEUM PRODUCING STATES OF THE U. S.

Each dot represents 25,000,000 barrels of oil in 1941 (latest figures)

Source: U. S. Bureau of Mines



COMPARISON OF PETROLEUM PRODUCTION—LEADING STATES

Figures from U. S. Bureau of Mines (1941)

Rank	State	Production
1	Texas	507,584,000 barrels
2	California	230,263,000 barrels
3	Oklahoma	154,759,000 barrels
4	Illinois	134,138,000 barrels
5	Louisiana	115,908,000 barrels
6	Kansas	83,261,000 barrels
7	New Mexico	39,369,000 barrels
8	Wyoming	29,694,000 barrels
9	Arkansas	26,327,000 barrels
TOTAL UNITED STATES		1,404,182,000 barrels

(Value in round figures—\$1,300,000,000)

California produces 16.4% (almost 1/6th) of total U. S. petroleum.

Foster and Kleiser Company OUTDOOR ADVERTISING delivers the most complete, effective and economical advertising coverage in this major petroleum producing area.

And, in addition, the Pacific Coast produces:

- 41.7% of the total U. S. fish catch
- 17.2% of all U. S. natural gas
- 21.5% of all U. S. natural gasoline (by-product of natural gas, not included in petroleum figures. Adds 10% to petroleum wealth.)
- 14.9% of all U. S. silver
- 84.4% of all U. S. mercury
- 28.3% of all U. S. tungsten ore (60% concentrates)
- 99.9% of all U. S. boron minerals
- 77.8% of all U. S. sodium salts
- 12.8% of all U. S. cement

as well as quantities of other minerals and mineral products such as aluminum, magnesium, dolomite, quicksilver, chromium, manganese, and some iron ore, antimony, vanadium, graphite, talc and barite. (The bulk of Pacific Coast mineral resources are in California, which alone has 11.04%, 1/9th, of *total* mineral production of the 48 states and Alaska. Authority: 1940 Minerals Yearbook.)

Note: All percentages are based on latest published figures, 1940 and 1941, of the U. S. Department of the Interior, except the one for cement which is from the 1939 Census of Manufactures.

Here is a great diversified natural wealth creating employment and high buying power in metropolitan center and small town alike.

Since these basic resources co-exist with substantial industrial and commercial activity, here on the Coast is to be found an outstanding marketing area of the nation, both now and in the postwar period.*

In your specific market analysis relative to planning of sales and advertising activity you need to know exactly where these basic resources are to be found, the communities most favorably affected and the most effective means of reaching these markets with your advertising message. This information is graphically pictured for you on the maps and supporting data that follow.

**Note:* At the present time, there is also on the Pacific Coast perhaps the heaviest concentration of military and naval personnel in any single section of the U. S. This is an important factor in current market analysis and will remain a substantial activity in the postwar period with the maintenance, as now planned, of a large Pacific Fleet and substantial ground and air forces. For additional information on this, write us for our study, "Pacific Coast War Production and Service Base Centers."

Basic Resources Maps of the Pacific Coast States have been prepared by Foster and Kleiser Company Research Department.

To the best of our knowledge, this is the first time this information has been presented in this complete and graphic form.

Map of California

Map of Oregon

Map of Washington

Map of Arizona

BASIC RESOURCES MAP OF CALIFORNIA



TOP FARM COUNTIES OF THE U. S. IN CALIFORNIA

All in "100 Leading U. S. Farm Counties" Group—
1942 Cash Farm Income, per county, \$17,000,000 to
\$126,034,000. Note: There are 3,086 counties (total
number) in the U. S.



SECOND MOST IMPORTANT FARM COUNTIES

1942 Cash Farm Income, per county, \$10,000,000 to
\$17,000,000. (In entire U. S. 282 out of total of 3,086
Counties are in this group.)



TOP LUMBER COUNTIES OF U. S. IN CALIFORNIA

Annual timber cut (1941) per county, exceeding
100,000,000 ft., b.m. (There are 46 counties in U. S.
with this volume of production. 38 are on the Coast.)
Annual sawmill value of cut, per county, \$3,000,000
to \$22,000,000.



SECOND MOST IMPORTANT LUMBER COUNTIES

Annual timber cut (1941) per county, 50,000,000 to
100,000,000 ft., b.m. \$1,500,000 to \$3,000,000 value
at sawmill. (There are 69 counties in U. S. with this
volume of cut. 11 are on the Coast.)



TOP MINING COUNTIES OF U. S. IN CALIFORNIA

(Gold, silver, copper, lead, zinc only)
Annual mine production (1941) per county,
\$10,000,000 or more.



SECOND MOST IMPORTANT MINING COUNTIES

(Gold, silver, copper, lead, zinc)
Mine production, (1941) per county, \$2,500,000 to
\$10,000,000.



TOP PETROLEUM PRODUCING COUNTIES OF U. S. IN CALIFORNIA

Annual production, per county (1941), \$10,000,000
to \$100,000,000.



SECOND MOST IMPORTANT PETROLEUM COUNTIES

Annual production, per county, \$5,000,000 to
\$10,000,000.

Counties are numbered from north to south to provide for ready reference in
Supplement which contains the summary of this data by counties, the list of
marketing centers, etc.

SCALE OF MILES

0 5 10 20 30

N

SOURCES OF DATA

(All figures are the latest available.)

1. Farm Income—"Sales Management Survey of Buying Power," May 10, 1943.
2. Lumber—"Census of Forest Products: 1941," U. S. Department of Commerce, Bureau of the Census.
3. Mining—"Minerals Yearbook: 1941," U. S. Department of the Interior, Bureau of Mines.
4. Petroleum—U. S. Department of the Interior, Bureau of Mines.

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BASIC RESOURCES MAP OF OREGON

SCALE OF MILES
0 8 16 24 32



TOP FARM COUNTIES OF THE U. S. IN OREGON

All in "100 Leading U. S. Farm Counties" Group—
1942 Cash Farm Income, per county, \$17,000,000 to
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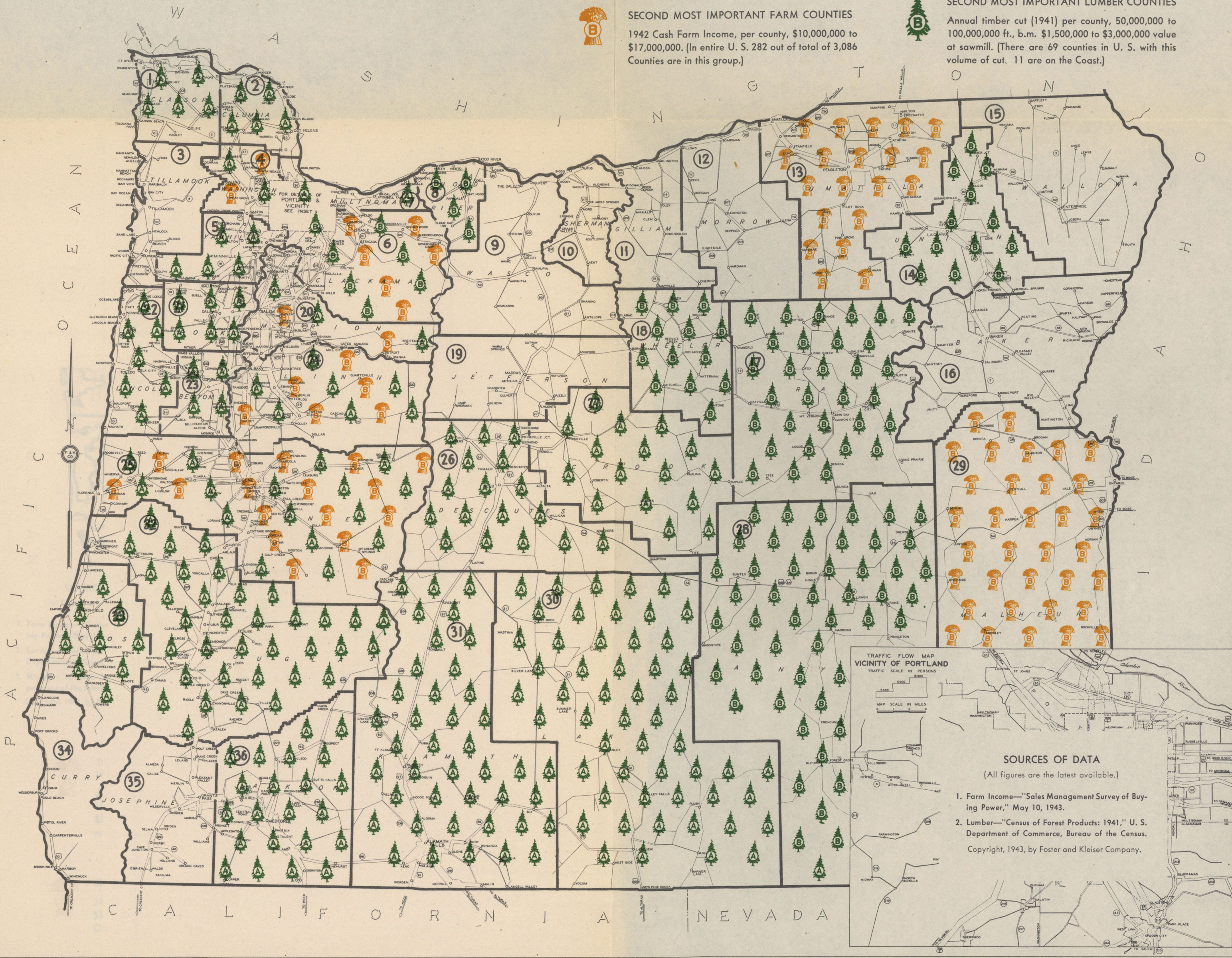
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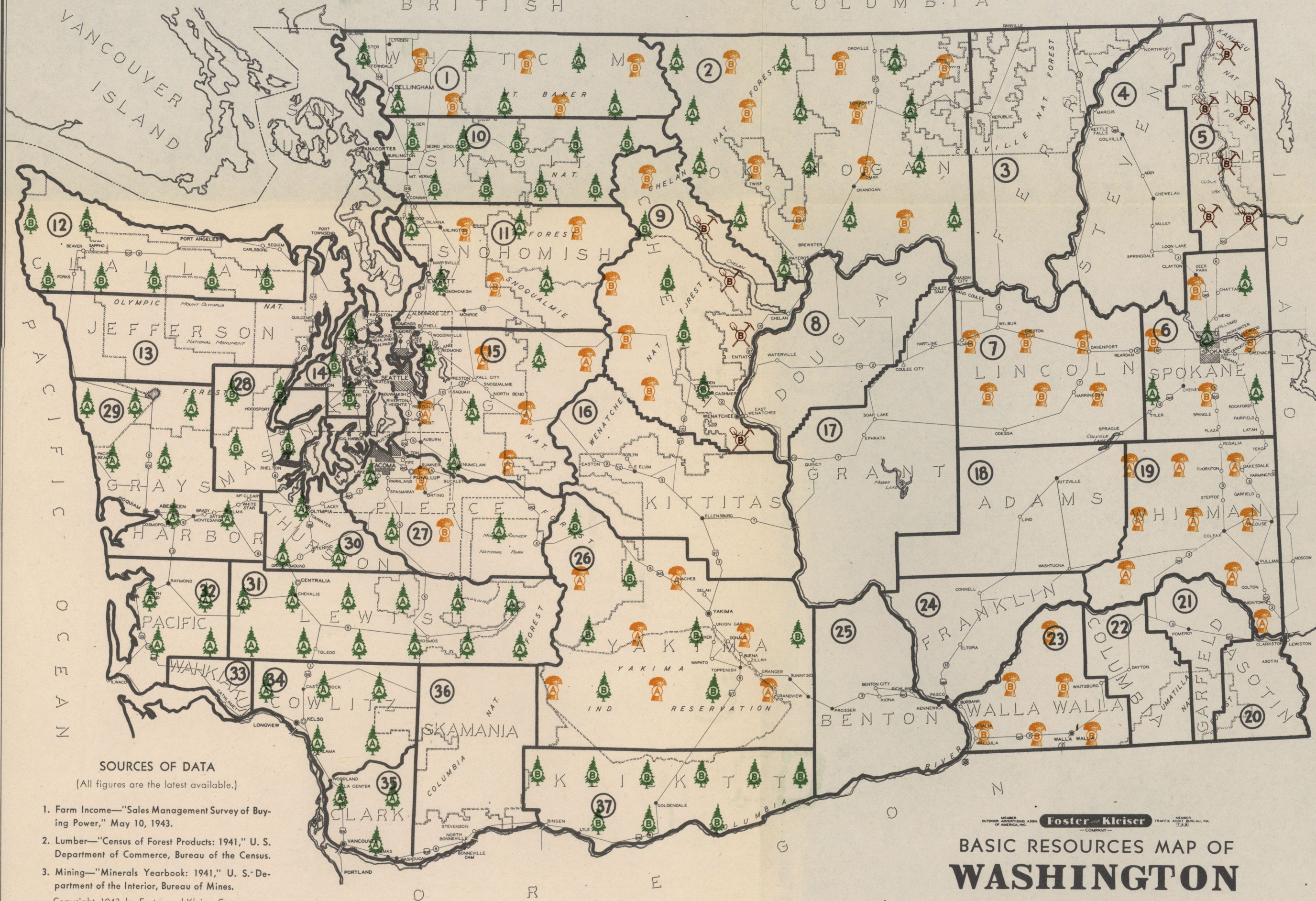
(All figures are the latest available.)

1. Farm Income—"Sales Management Survey of Buying Power," May 10, 1943.
2. Lumber—"Census of Forest Products: 1941," U. S. Department of Commerce, Bureau of the Census.

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BRITISH

COLUMBIA



SOURCES OF DATA

(All figures are the latest available.)

1. Farm Income—"Sales Management Survey of Buying Power," May 10, 1943.
2. Lumber—"Census of Forest Products: 1941," U. S. Department of Commerce, Bureau of the Census.
3. Mining—"Minerals Yearbook: 1941," U. S. Department of the Interior, Bureau of Mines.

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Foster and Kleiser COMPANY

BASIC RESOURCES MAP OF
WASHINGTON

SCALE OF MILES

10 5 0 10 20 30 40 50

TOP FARM COUNTIES OF THE U. S. IN
WASHINGTON

All in "100 Leading U. S. Farm Counties" Group—1942 Cash Farm Income, per county, \$17,000,000 to \$126,034,000. Note: There are 3,086 counties (total number) in the U. S.



SECOND MOST IMPORTANT FARM COUNTIES

1942 Cash Farm Income, per county, \$10,000,000 to \$17,000,000. (In entire U. S. 282 out of total of 3,086 Counties are in this group.)

TOP LUMBER COUNTIES OF U. S. IN
WASHINGTON

Annual timber cut (1941) per county, exceeding 100,000,000 ft., b.m. (There are 46 counties in U. S. with this volume of production. 38 are on the Coast.) Annual sawmill value of cut, per county, \$3,000,000 to \$22,000,000.



SECOND MOST IMPORTANT LUMBER COUNTIES

Annual timber cut (1941) per county, 50,000,000 to 100,000,000 ft., b.m. \$1,500,000 to \$3,000,000 value at sawmill. (There are 69 counties in U. S. with this volume of cut. 11 are on the Coast.)

TOP MINING COUNTIES OF U. S. IN
WASHINGTON

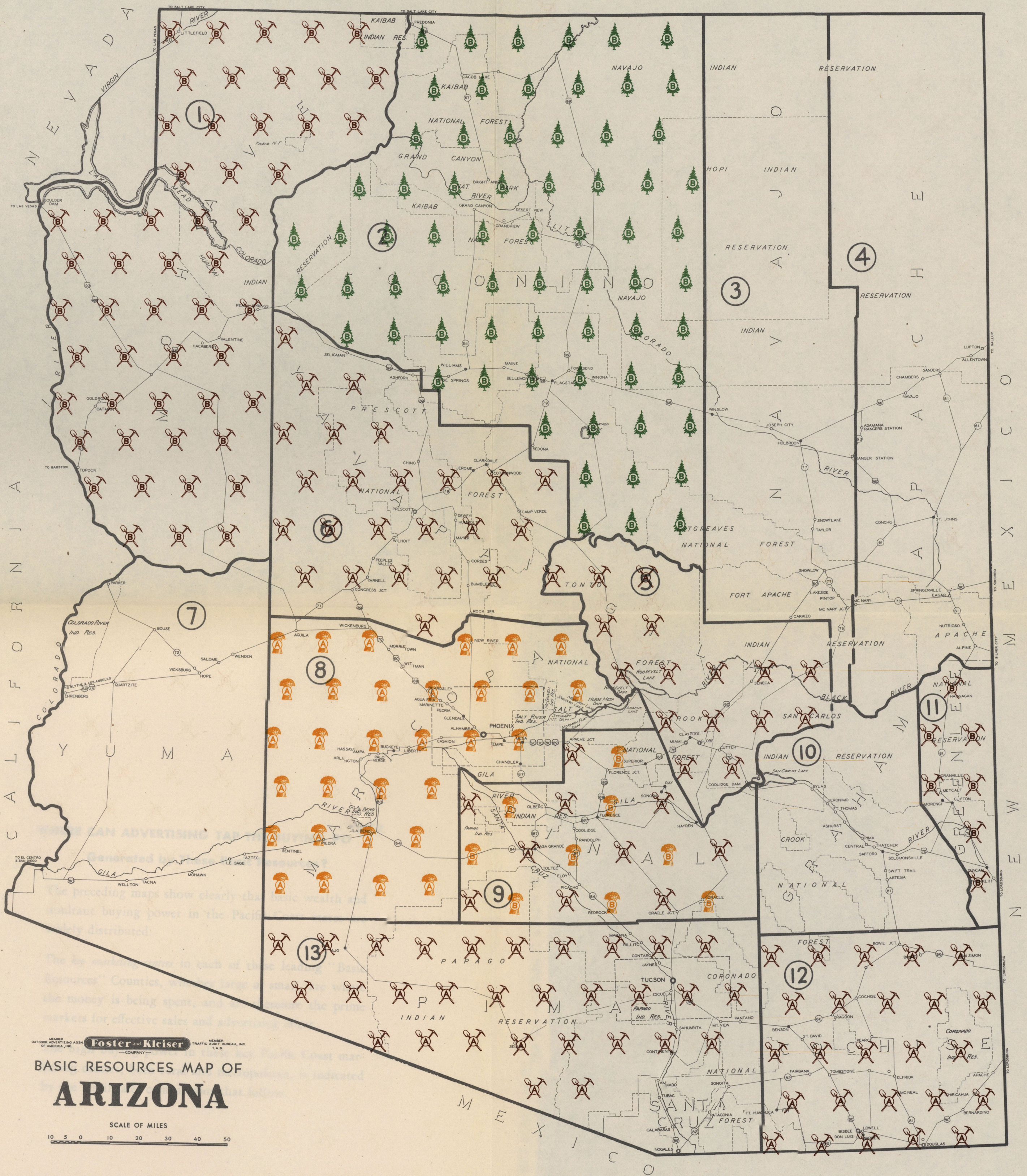
(Gold, silver, copper, lead, zinc only)

Annual mine production (1941) per county, \$10,000,000 or more.

SECOND MOST IMPORTANT MINING COUNTIES
(Gold, silver, copper, lead, zinc)

Mine production, (1941) per county, \$2,500,000 to \$10,000,000.

Counties are numbered from north to south to provide for ready reference in Supplement which contains the summary of this data by counties, the list of marketing centers, etc.



Foster Kleiser **BASIC RESOURCES MAP OF ARIZONA**

SCALE OF MILES
10 5 0 10 20 30 40 50



TOP FARM COUNTIES OF THE U. S. IN ARIZONA

All in "100 Leading U. S. Farm Counties" Group—1942 Cash Farm Income, per county, \$17,000,000 to \$126,034,000. Note: There are 3,086 counties (total number) in the U. S.



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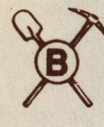
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TOP MINING COUNTIES OF U. S. IN ARIZONA

(Gold, silver, copper, lead, zinc only)
Annual mine production (1941) per county, \$10,000,000 or more.



SECOND MOST IMPORTANT MINING COUNTIES

(Gold, silver, copper, lead, zinc)
Mine production, (1941) per county, \$2,500,000 to \$10,000,000.

SOURCES OF DATA

(All figures are the latest available.)

1. Farm Income—"Sales Management Survey of Buying Power," May 10, 1943.
2. Lumber—"Census of Forest Products: 1941," U. S. Department of Commerce, Bureau of the Census.
3. Mining—"Minerals Yearbook: 1941," U. S. Department of the Interior, Bureau of Mines.

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Counties are numbered from north to south to provide for ready reference in Supplement which contains the summary of this data by counties, the list of marketing centers, etc.

WHERE CAN ADVERTISING TAP THE BUYING POWER

Generated by These Basic Resources?

The preceding maps show clearly that basic wealth and resultant buying power in the Pacific Coast states are widely distributed.

The *key marketing centers* in each of these leading "Basic Resources" Counties, whether large or small, are where the money is being spent, and are therefore the prime markets for effective sales and advertising effort.

The high buying power in these key Pacific Coast marketing centers, both rural and metropolitan, is indicated by the retail sales comparisons that follow.

U. S. DEPARTMENT OF COMMERCE

Retail Sales, Independent Stores

Percentage Change, 1st 6 months, 1943 vs. 1st 6 months, 1942

Summary for *34 States—Compared with Pacific Coast States.

City-Size Groups	*34 States	California	Oregon	Washington	Arizona
100,000 and over	+19	+25	+39	+29	**
50,000 to 99,999	+17	+24	**	**	+15
25,000 to 49,999	+17	+27	+10	+22	+26
10,000 to 24,999	+17	+26	+17	+25	**
5,000 to 9,999	+15	+21	+26	+19	**
2,500 to 4,999	+13	+21	+19	+28	+22
Places less than 2,500	+10	+19	+22	+20	+23

*All states counted by Department of Commerce in this regular study.

**No cities in this group.

It will be noted that most of the increases in the Pacific Coast States substantially exceed those for the country as a whole. To take cities of 100,000 and over as an example, the California gain in these cities is 32% greater than the national increase in cities of the same size (the California gain of 25% is 32% greater than U. S. gain of 19%); the Oregon gain is 105% greater; the Washington gain is 53% greater.

The "spread" of higher comparative buying power in Pacific Coast States is clearly evidenced by the favorable balance maintained by Coast communities in *all* city-size groups.

This prosperity reaches to the smallest communities as shown by the fact that in communities of less than 2,500 population, the California gain is almost 100% greater than the nation's; Oregon, Washington and Arizona gains are all over 100% greater.

This favorable Coast picture is even more significant when it is considered that these 1943 increases are on top of record gains for 1942 over 1941 and 1941 over 1940.

To repeat the question :

WHERE CAN ADVERTISING TAP THIS BUYING POWER?

As previously pointed out, it must be in the marketing centers of the leading Coast "Basic Resources" (and industrial) Counties. It is here that the money is being spent today and it is here that one of the nation's best prospects for jobs and prosperity in the postwar period will be found.

What size marketing centers ?

The very evident "spread" of diversified basic resources shown by the maps, and the foregoing figures on retail sales show that *all sizes* of Coast communities are excellent markets and all well above the national average.

For proper selection of markets, therefore, it is necessary only to determine which are the marketing centers of the prime counties shown on the "Basic Resources" maps. (The attached supplement contains the complete listing.)

From this point on, it is obviously a matter of "cutting the cloth to fit the pattern."

WHAT ADVERTISING MEDIUM SHOULD BE USED?

We do not attempt in this research study to make an advertising medium solicitation. It is our desire only that the facts presented for the first time in this graphic form will aid you in achieving a practical, realistic analysis of the Pacific Coast as a market, both today and for your postwar planning.

We do say, however,—with the same certainty with which we have pointed out the breadth and “balance” of Pacific Coast economy, and with equal substantiation in fact, that . . .

The Pacific Coast is a “natural outdoor market,” (year-around mild climate and outdoor living assure this) that all prime marketing centers of the Pacific Coast, both rural and metropolitan, are reached with maximum effectiveness and economy by . .

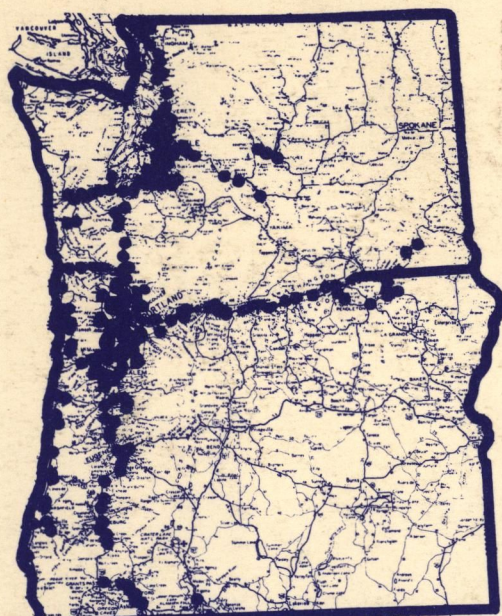
Foster and Kleiser
— COMPANY —
OUTDOOR ADVERTISING

Note: See attached supplement for list of recommended communities.

We shall be glad to counsel with you on your Pacific Coast marketing problems both now and in connection with postwar planning . . . to place at your disposal the practical knowledge gained through extensive research on this and previous studies, and through many years of successful business operation in more than 500 Pacific Coast cities and towns.

Please do not hesitate to call on us.

THE SCOPE OF FOSTER AND KLEISER COMPANY OUTDOOR ADVERTISING SERVICE



On the map at left are spotted the towns in which Foster and Kleiser Company maintains its coastwide facilities and service.

Here is an unequalled, effective and economical coverage of the key marketing centers, both large and small, through which flow the diversified wealth of the Pacific Coast. Here is "the natural medium" in this "natural Outdoor market."



Foster and Kleiser

— COMPANY —

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