

Labor Market Overview: Central Valley/Mother Lode Region

May, 2016



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Center of Excellence
Central/Mother Lode Region

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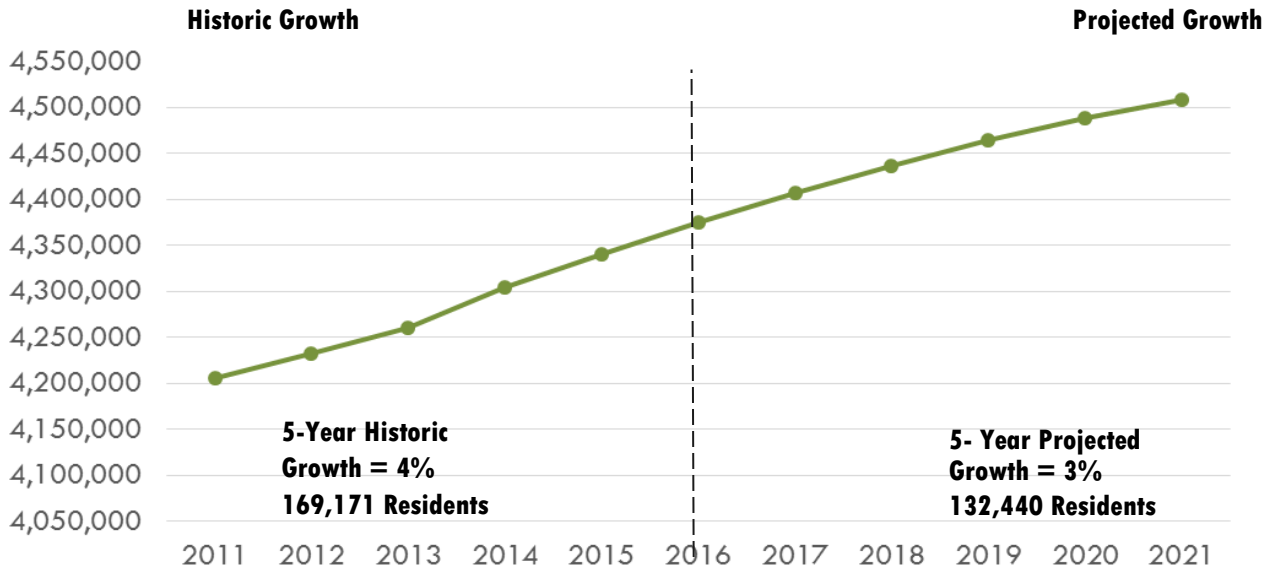
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Regional Population Characteristics

Residential Population

The Central Valley/Mother Lode (CVML) Region consists of 15 counties: **Alpine, Amador, Bakersfield, Calaveras, Fresno, Inyo, Kern, Kings, Mariposa, Merced, Mono, San Joaquin, Stanislaus, Tulare, and Tuolumne**. The residential population numbered close to 4.4 million in 2016, with an additional 132,440 residents projected by 2021 (Exhibit 1). Over the last five years, the CVML Region grew by 4%, somewhat slower than the state’s growth of 4.7%. The projected growth rate of 3% is also slower than in the previous five years and nearly matches the state’s projected growth rate of 3.1%.

Exhibit 1: Central Valley/Mother Lode Region Population Estimates and Projections



Labor Force, Civilian Employment, and Unemployment

The size and characteristics of a region’s labor force are important considerations in workforce planning. Labor force, employment, and unemployment data are based upon “place of residence” – where people live, regardless of where they work. Individuals who have more than one job are counted only once. These data elements differ from industry employment estimates that are “place of work” based – where the employer/workplace is located, regardless of where the employee resides. For terms and definitions, see Appendix A.

Since 2011, the CVML regional labor force has increased in size by 51,960 persons, indicating an entrance of working age individuals into the workforce of 3%. Total employment increased by 177,690 persons (Exhibit 2). Because total employment increased more than the labor force, the unemployment rate decreased from 17% in 2011 (compared to 11.5% statewide) to 10% in 2016 (compared to 5.2% statewide).

Exhibit 2: Labor Force and Unemployment Rate, 2011-2016

	April 2011	April 2016	5-Year Change
Labor Force	1,873,450	1,925,410	51,960
Employment	1,563,010	1,740,700	177,690
Unemployment	310,340	184,740	(125,600)
Unemployment Rate	17%	10%	-7%

Demographic Overview

Central Valley/Mother Lode Region demographics will change somewhat in the next five years. The total Hispanic population in the region is projected to reach 52% by 2021, an increase of two percentage points from 2016 (Exhibit 3).

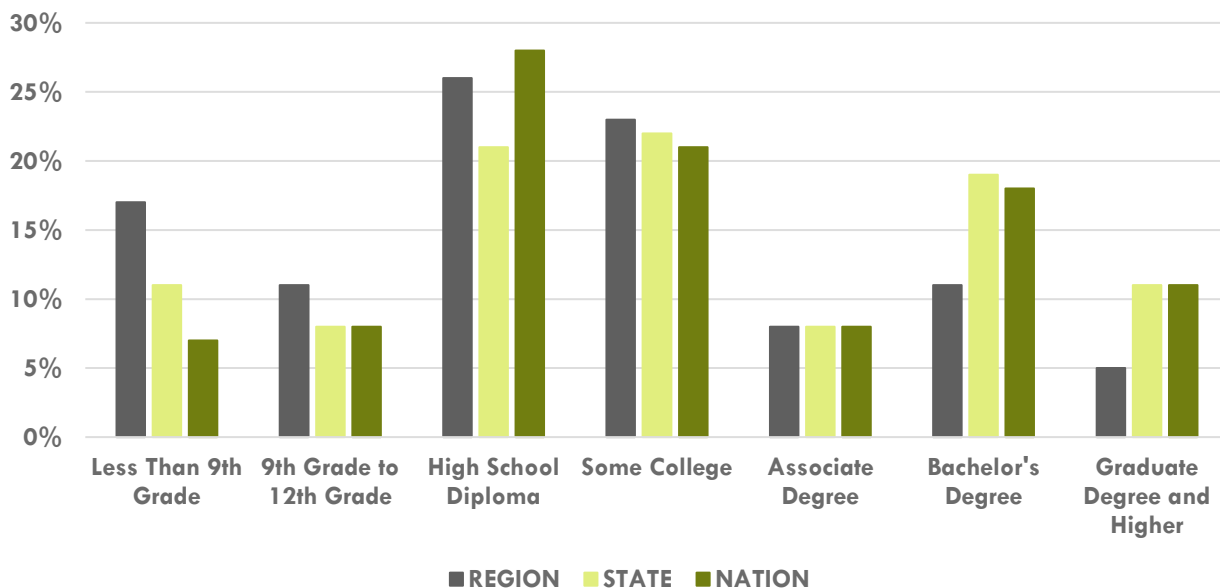
Exhibit 3: Ethnicity/Race Changes, 2011-2016

Race/Ethnicity	2016	2021	Change	% Change
	Population	Population		
White, Hispanic	1,951,783	2,069,316	117,533	6%
White, Non-Hispanic	1,541,483	1,503,803	(37,680)	-2%
Asian, Non-Hispanic	321,599	342,178	20,579	6%
Black, Non-Hispanic	187,728	190,357	2,629	1%
Two or More Races, Non-Hispanic	94,576	100,894	6,318	7%
American Indian or Alaskan Native, Hispanic	88,102	95,854	7,752	9%
Two or More Races, Hispanic	60,001	66,916	6,915	12%
Black, Hispanic	44,085	48,023	3,938	9%
Asian, Hispanic	36,526	39,646	3,120	9%
American Indian or Alaskan Native, Non-Hispanic	30,064	29,710	(354)	-1%
Native Hawaiian or Pacific Islander, Non-Hispanic	12,050	13,157	1,107	9%
Native Hawaiian or Pacific Islander, Hispanic	7,194	7,778	584	8%
Total	4,375,191	4,507,631	132,440	3%

Educational Attainment

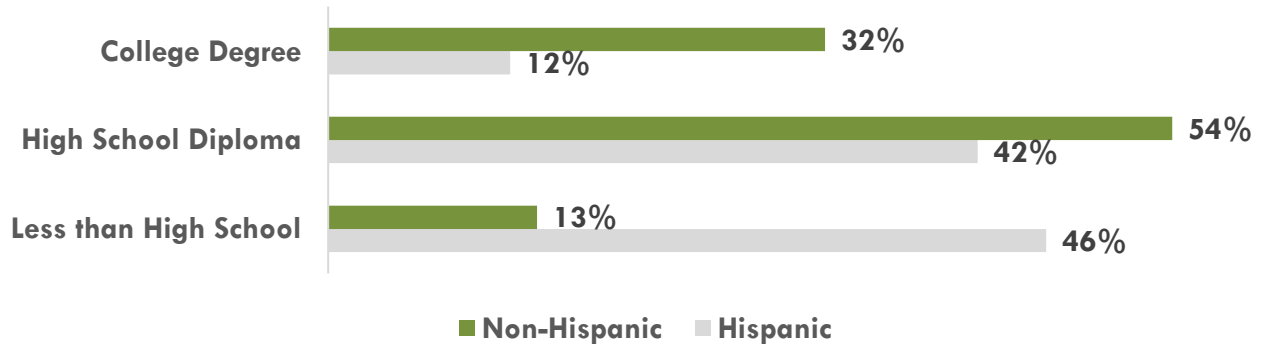
Postsecondary educational attainment in the region is lower than statewide and nationwide rates in every category except for “some college” and associate degree (Exhibit 4). Only 16% of the adult population holds a bachelor’s or graduate degree, compared to 30% statewide and 29% nationwide. Within the CVML Region, 54% of the population has a high school diploma or less, compared to 40% statewide and 43% nationwide.

Exhibit 4: Educational Attainment, 2016 Percent of Population



Hispanic educational attainment in the CVML Region is lower than non-Hispanic educational attainment. Only 12% of the Hispanic population earned a college degree (associate degree or higher), compared to 32% of the non-Hispanic population (Exhibit 5). Conversely, 46% of the Hispanic population did not complete high school, compared to 13% of the non-Hispanic population.

Exhibit 5: 2016 Hispanic/Non-Hispanic Educational Attainment

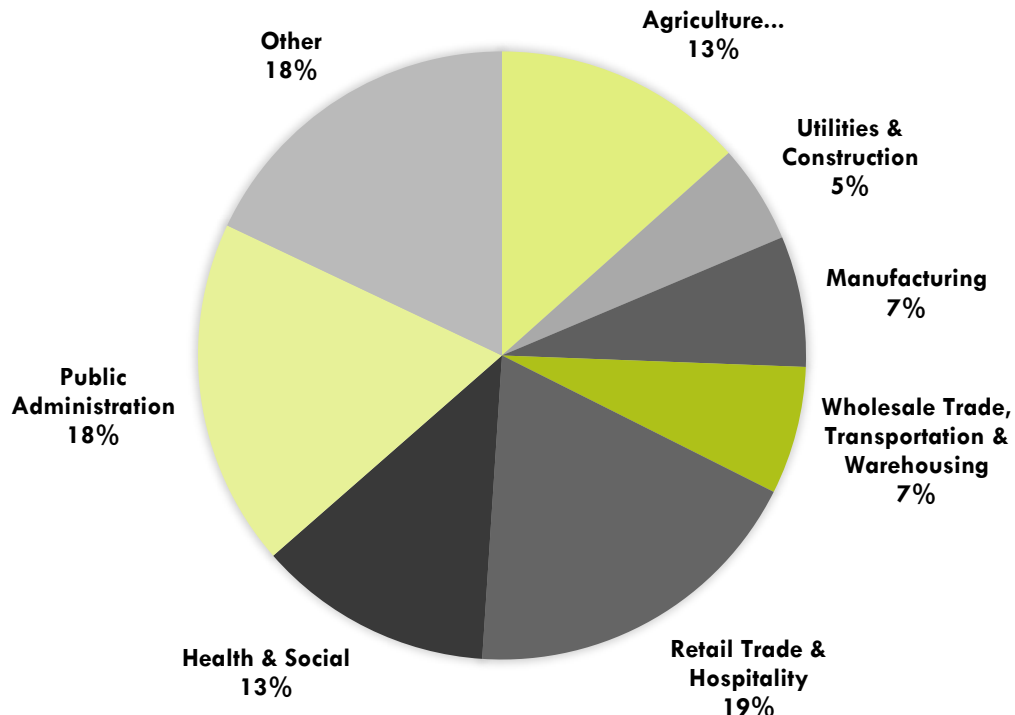


Industry Employment

Employment Composition

The Central Valley/Mother Lode Region has nearly 1.7 million jobs as of April 2016. In Exhibit 6, this employment is distributed into eight major industrial groupings. The largest shares of employment are attributed to retail trade and hospitality, public administration, health care and social assistance, and agriculture. These are followed by manufacturing as well as wholesale trade, transportation, and warehousing. The smallest shares of employment that are aggregated within the “Other” category represent regional non-priority industry groups with less than 5% of the total jobs in the Region.

Exhibit 6: Central Valley/Mother Lode Region 2016 Employment by Industry Groups



Health Care and Social Assistance Sector

In 2016, the majority of health care and social assistance jobs were with services for the elderly and persons with disabilities, followed by general hospitals, physicians' offices, and nursing care facilities. Major growth is projected in HMOs, home health care services, and services for the elderly and persons with disabilities. Although child day care services have the fifth largest number of jobs, there is an expected 7% decline over the next five-year period. Overall, this sector is projected to grow by 13%, adding 27,190 new positions by 2021 (Exhibit 7).

Exhibit 7: 2016 Health Care and Social Assistance Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Services for the Elderly and Persons with Disabilities	43,714	55,796	12,082	28%	33,398
General Medical and Surgical Hospitals	41,123	42,609	1,486	4%	60
Offices of Physicians (except Mental Health Specialists)	26,212	28,191	1,979	8%	2,668
Nursing Care Facilities (Skilled Nursing Facilities)	14,517	16,208	1,691	12%	174
Child Day Care Services	12,476	11,657	(819)	-7%	496
Offices of Dentists	10,198	10,626	428	4%	1,411
Home Health Care Services	8,075	10,585	2,510	31%	178
HMO Medical Centers	5,482	7,692	2,210	40%	32
Assisted Living Facilities for the Elderly	4,891	5,616	725	15%	269
Vocational Rehabilitation Services	4,363	4,574	211	5%	121
Child and Youth Services	3,283	3,631	348	11%	121
Other Individual and Family Services	3,167	2,950	(217)	-7%	239
Residential Intellectual and Developmental Disability Facilities	2,714	2,560	(154)	-6%	194
Continuing Care Retirement Communities	2,664	3,338	674	25%	37
Ambulance Services	2,529	2,896	367	15%	49
Offices of Physical, Occupational and Speech Therapists, and Audiologists	2,397	2,880	483	20%	200
Residential Mental Health and Substance Abuse Facilities	2,220	2,670	450	20%	90
All Other Outpatient Care Centers	1,773	2,411	638	36%	64
Offices of Optometrists	1,703	1,906	203	12%	214
Kidney Dialysis Centers	1,664	2,020	356	21%	79
Outpatient Mental Health and Substance Abuse Centers	1,604	1,924	320	20%	70
Other Residential Care Facilities	1,534	1,431	(103)	-7%	118
Offices of Mental Health Practitioners (except Physicians)	1,490	1,804	314	21%	75
Offices of Chiropractors	1,269	1,161	(108)	-9%	321
Diagnostic Imaging Centers	1,206	1,512	306	25%	56
Medical Laboratories	1,009	1,050	41	4%	169
Offices of All Other Miscellaneous Health Practitioners	838	971	133	16%	70
Freestanding Ambulatory Surgical and Emergency Centers	790	917	127	16%	51
All Other Combined	4,004	4,513	509	13%	301
Total	208,907	236,098	27,190	13%	41,325

Retail Trade Sector

In 2016, the majority of retail jobs were with supermarkets and other grocery stores, followed by discount department stores, and warehouse clubs and supercenters (Exhibit 8). Although new car dealers have the fourth largest number of jobs, these positions are expected to experience a decline of 1% (shedding 109 jobs). The largest decline (47%) is projected for department stores (except discount department stores) with a loss of 1,814 jobs. Overall, the retail trade sector is projected to increase by 6% during the next five-year period, adding more than 11,000 new positions.

Exhibit 8: 2016 Retail Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Supermarkets and Other Grocery (except Convenience) Stores	27,007	28,717	1,710	6%	931
Discount Department Stores	17,623	18,468	845	5%	148
Warehouse Clubs and Supercenters	10,993	15,066	4,073	37%	43
New Car Dealers	10,432	10,323	(109)	-1%	229
Pharmacies and Drug Stores	8,093	8,145	52	1%	607
Home Centers	8,044	8,850	806	10%	106
Gasoline Stations with Convenience Stores	6,916	6,883	(33)	0%	841
All Other General Merchandise Stores	5,445	6,762	1,317	24%	357
Automotive Parts and Accessories Stores	5,309	5,616	307	6%	486
Electronics Stores	4,741	5,242	501	11%	352
Family Clothing Stores	4,593	4,998	405	9%	224
Department Stores (except Discount Department Stores)	3,892	2,078	(1,814)	-47%	37
Sporting Goods Stores	3,155	3,571	416	13%	218
Hobby, Toy, and Game Stores	3,000	3,821	821	27%	108
Women's Clothing Stores	2,923	3,647	724	25%	240
Other Building Material Dealers	2,661	2,593	(68)	-3%	193
Hardware Stores	2,480	2,667	187	8%	185
Tire Dealers	2,376	2,415	39	2%	298
Convenience Stores	2,315	2,552	237	10%	369
Used Merchandise Stores	2,301	2,503	202	9%	142
Used Car Dealers	2,209	2,610	401	18%	169
Shoe Stores	2,108	2,425	317	15%	215
Other Gasoline Stations	1,949	1,933	(16)	-1%	85
Furniture Stores	1,860	1,669	(191)	-10%	192
Pet and Pet Supplies Stores	1,552	1,774	222	14%	89
Nursery, Garden Center, and Farm Supply Stores	1,472	1,437	(35)	-2%	127
Office Supplies and Stationery Stores	1,428	1,214	(214)	-15%	79
Other Direct Selling Establishments	1,424	1,247	(177)	-12%	48
Cosmetics, Beauty Supplies, and Perfume Stores	1,421	1,826	405	29%	113
Gift, Novelty, and Souvenir Stores	1,346	1,130	(216)	-16%	131
Jewelry Stores	1,306	1,159	(147)	-11%	189
Other Clothing Stores	1,297	1,426	129	10%	95
All Other Home Furnishings Stores	1,294	1,468	174	13%	89
Beer, Wine, and Liquor Stores	1,283	1,266	(17)	-1%	292
All Other Miscellaneous Store Retailers (except Tobacco Stores)	1,270	1,205	(65)	-5%	165
Meat Markets	954	1,027	73	8%	89
Sewing, Needlework, and Piece Goods Stores	906	1,007	101	11%	46
All Other Specialty Food Stores	818	531	(287)	-35%	76
Tobacco Stores	723	827	104	14%	102
Florists	722	589	(133)	-18%	102
Floor Covering Stores	718	515	(203)	-28%	82
All Other Combined	10,457	10,626	168	0	998
Total	172,816	183,827	11,011	6%	9,680

Manufacturing Sector

In 2016, the majority of manufacturing jobs were in fruit and vegetable canning, poultry processing, and wineries (Exhibit 9). Declines are projected for several firm types, including fruit and vegetable canning, commercial printing, and commercial bakeries; however, the manufacturing sector is projected to grow overall by 2% during the next five-year period, adding 2,586 jobs.

Exhibit 9: 2016 Manufacturing Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Fruit and Vegetable Canning	9,057	8,725	(332)	-4%	41
Poultry Processing	8,122	8,280	158	2%	115
Wineries	7,883	8,687	804	10%	174
Roasted Nuts and Peanut Butter Manufacturing	4,517	4,912	395	9%	23
Cheese Manufacturing	4,419	4,760	341	8%	25
Animal (except Poultry) Slaughtering	2,658	2,754	96	4%	9
Dried and Dehydrated Food Manufacturing	2,606	2,277	(329)	-13%	28
Corrugated and Solid Fiber Box Manufacturing	2,593	3,005	412	16%	22
Fluid Milk Manufacturing	2,479	2,649	170	7%	19
Frozen Fruit, Juice, and Vegetable Manufacturing	2,212	2,346	134	6%	13
Perishable Prepared Food Manufacturing	2,181	2,436	255	12%	10
Commercial Printing (except Screen and Books)	2,105	1,609	(496)	-24%	112
Frozen Specialty Food Manufacturing	2,066	2,097	31	2%	6
Meat Processed from Carcasses	1,908	2,173	265	14%	24
Other Animal Food Manufacturing	1,881	1,993	112	6%	66
Fabricated Structural Metal Manufacturing	1,791	1,981	190	11%	41
Farm Machinery and Equipment Manufacturing	1,616	1,830	214	13%	56
Machine Shops	1,544	1,554	10	1%	155
Other Snack Food Manufacturing	1,431	1,527	96	7%	5
Glass Container Manufacturing	1,412	1,365	(47)	-3%	5
Ice Cream and Frozen Dessert Manufacturing	1,385	1,577	192	14%	10
Wood Kitchen Cabinet and Countertop Manufacturing	1,325	1,324	(1)	0%	84
Commercial Bakeries	1,145	1,012	(133)	-12%	29
Soft Drink Manufacturing	1,132	1,244	112	10%	9
Other Paperboard Container Manufacturing	1,066	1,212	146	14%	7
All Other Plastics Product Manufacturing	1,026	1,054	28	3%	40
Ready-Mix Concrete Manufacturing	990	780	(210)	-21%	50
Tortilla Manufacturing	949	961	12	1%	10
Petroleum Refineries	941	1,101	160	17%	25
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	849	549	(300)	-35%	8
All Other Miscellaneous Food Manufacturing	836	999	163	19%	8
Plastics Pipe and Pipe Fitting Manufacturing	833	808	(25)	-3%	10
Other Aircraft Parts and Auxiliary Equipment Manufacturing	830	1,064	234	28%	5
Wood Container and Pallet Manufacturing	826	811	(15)	-2%	34
Motor Vehicle Body Manufacturing	707	776	69	10%	12
Packaging Machinery Manufacturing	689	705	16	2%	11
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	678	799	121	18%	32
Sheet Metal Work Manufacturing	670	726	56	8%	26
Retail Bakeries	669	584	(85)	-13%	66
Prefabricated Metal Building and Component Manufacturing	666	546	(120)	-18%	13
Other Motor Vehicle Parts Manufacturing	663	588	(75)	-11%	12
All Other Combined	32,729	32,034	(238)	-1%	1,228
Total	116,086	118,214	2,586	2%	2,674

Agriculture Sector

The Central Valley/Mother Lode Region's leading agricultural commodities include almonds, milk, walnuts, and chickens. In addition to farm labor contractors and crew leaders, the majority of agriculture jobs fell within crop production, and animal production and aquaculture in 2016 (Exhibit 10). Overall, this sector is projected to grow by 3% over the next five years.

Exhibit 10: 2016 Agriculture Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Farm Labor Contractors and Crew Leaders	94,324	103,060	8,736	9%	690
Crop Production	68,386	64,943	(3,443)	-5%	4,072
Animal Production and Aquaculture	25,298	23,934	(1,364)	-5%	1,373
Postharvest Crop Activities (except Cotton Ginning)	20,358	21,685	1,327	7%	288
Soil Preparation, Planting, and Cultivating	5,854	6,550	696	12%	305
Farm Management Services	5,040	5,225	185	4%	176
Crop Harvesting, Primarily by Machine	2,560	2,513	(47)	-2%	180
Support Activities for Animal Production	722	614	(108)	-15%	107
Logging	296	277	(19)	-6%	31
Forest Nurseries and Gathering of Forest Products	221	193	(28)	-13%	26
Cotton Ginning	175	51	(124)	-71%	24
Support Activities for Forestry	138	146	8	6%	9
Finfish Fishing	65	85	20	31%	1
Hunting and Trapping	34	35	1	3%	4
Shellfish Fishing	28	38	10	36%	0
Total	223,498	229,350	5,850	3%	7,284

Occupational Employment

Job Posting Trends

Burning Glass, an online job posting aggregation tool, was utilized to identify occupations with the most job openings in the Central Valley/Mother Lode Region.¹ Job postings were selected for inclusion in the analysis based on three criteria:

1. The minimum education requirement was a high school diploma or vocational certificate*, or associate degree;
2. The job posting was listed within the last 12 months (May 1, 2015 - April 30, 2016); and,
3. The job posting indicated the position was physically located in one of the region's 14 counties.

There were 54,748 job postings identified as a possible match. Almost one-fifth of the postings were for nurses. Exhibit 11 shows the top 20 job posting titles during the one-year period (accounting for 52% of the postings). Registered nurses was the only occupation showing a significant demand in terms of total job postings. Industries with the most job postings include health care and social services (28%); retail trade (14%); education services (10%); manufacturing (7%); and professional, scientific, and technical services (5%).

Exhibit 11: 2016 Job Postings Requiring a High School Diploma or Vocational Training, or Associate Degree, Central Valley/Mother Lode Region

Occupational Title	# of Job Postings	% of Total	2016 Hourly Wages
Registered Nurses	9,390	17%	\$41.58
Retail Salespersons	2,803	5%	\$10.86
First-Line Supervisors of Retail Sales Workers	1,876	3%	\$16.46
Customer Service Representatives	1,638	3%	\$15.72
Critical Care Nurses	1,350	2%	\$41.58
Sales Representatives, Wholesale and Manufacturing	1,310	2%	\$25.82
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,306	2%	\$16.26
Teacher Assistants	1,127	2%	\$13.65
Maintenance and Repair Workers, General	1,023	2%	\$17.94
Laborers and Freight, Stock, and Material Movers, Hand	875	2%	\$12.00
Merchandise Displayers and Window Trimmers	789	1%	\$12.99
Security Guards	697	1%	\$10.61
Managers, All Other	680	1%	\$29.51
Bookkeeping, Accounting, and Auditing Clerks	640	1%	\$17.45
Combined Food Preparation and Serving Workers, Including Fast Food	547	1%	\$9.72
Office Clerks, General	507	1%	\$13.77
Coaches and Scouts	493	1%	\$16.21
First-Line Supervisors of Office and Administrative Support Workers	485	1%	\$23.35
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	453	1%	\$12.40
First-Line Supervisors of Food Preparation and Serving Workers	449	1%	\$13.15

¹ Burning glass is an online job posting aggregation tool that uses intelligent "spidering" programs to search the Internet for job listings and integrates the information into a searchable database. While efforts have been made to remove duplication, it is possible that a posting removed and re-entered over the 12-month period is counted more than once.

*Selection option is high school diploma or vocational training; these two can no longer be isolated from one another.

Five of the top 20 occupations posted in the last 12 months exceed the average hourly living wage for one adult and one child: registered nurses; critical care nurses; sales representatives, wholesale and manufacturing; managers, all other; and first-line supervisors of office and administrative support workers. Living, poverty and minimum hourly wages are shown in Exhibit 12.

Exhibit 12: Average Living, Poverty and Minimum Wages with One Adult Working Full-Time

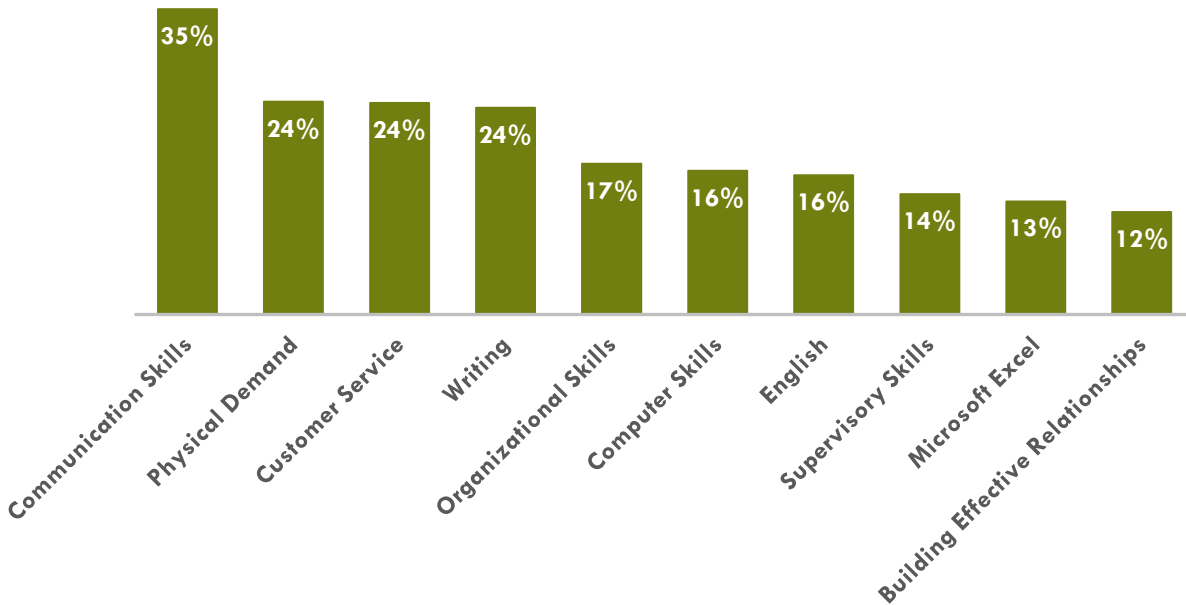
Hourly Wages	1 Adult	1 Adult 1 Child	1 Adult 2 Children	1 Adult 3 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children	2 Adults 3 Children
Living Wage	\$ 10.59	\$ 22.38	\$ 25.95	\$ 32.53	\$ 8.46	\$ 12.34	\$ 14.35	\$ 16.68
Poverty Wage	\$ 5.00	\$ 7.00	\$ 9.00	\$ 11.00	\$ 3.00	\$ 4.00	\$ 5.00	\$ 6.00
Minimum Wage	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00

High Demand Skills

Of the 54,748 jobs posted in the Central Valley/Mother Lode Region between May 2015 and April 2016, 78% of them listed skills.

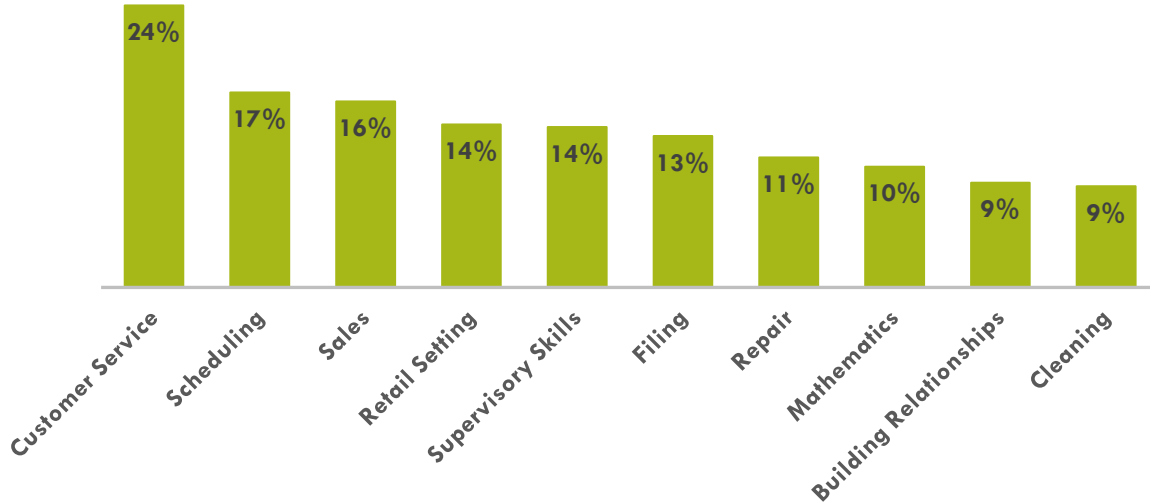
Baseline Skills: The baseline skills listed most frequently among the 42,619 postings included communication skills (35%), physical demand (24%), customer service (24%), and writing skills (24%) (Exhibit 13).

Exhibit 13: Baseline Skills in Greatest Demand



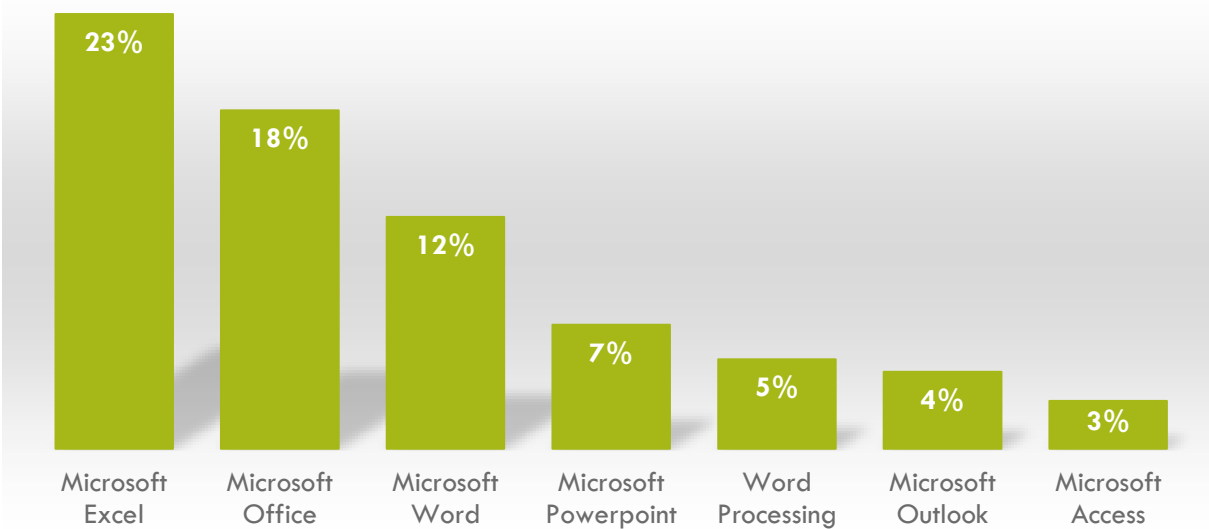
Specialized Skills: The specialized skills most frequently listed among the 42,619 postings were customer service (24%), scheduling (17%), and sales (16%) (Exhibit 14).

Exhibit 14: Specialized Skills in Greatest Demand



There were a total of 23,774 software specifications among the 42,619 postings. Of these 23,774 specifications, 73% were for a Microsoft product, and 23% were specific to Excel (Exhibit 15).

Exhibit 15: Software Skills in Greatest Demand



Appendix A: Sources, Terms and Definitions

This labor market report was prepared for the Central Regional Consortium by the Central Valley/Mother Lode California Center of Excellence (COE), an initiative of the California Community Colleges Economic and Workforce Development program.

Data Sources

Population estimates and projections: Economic Modeling Specialists Inc. (EMSI), <http://www.economicmodeling.com/>

Educational attainment: Economic Modeling Specialists Inc. (EMSI), <http://www.economicmodeling.com>

Labor force, employment and unemployment estimates: California Employment Development Department, Labor Market Information Division, labormarketinfo.edd.ca.gov

Industry and occupational employment estimates and projections, wages and other data: Economic Modeling Specialists Inc. (EMSI), <http://www.economicmodeling.com/>

Job posting data: Burning Glass, <http://www.burning-glass.com/>

Living wage calculator: <http://livingwage.mit.edu/states/06/locations>

Related Terms and Definitions

The **civilian labor force** is the sum of civilian employment and civilian unemployment. Civilians, as defined, are age 16 years or older, not members of the military, and are not in institutions such as prisons, mental hospitals, or nursing homes.

Civilian employment includes all individuals who worked at least one hour for a wage or salary, or were self-employed, or were working at least 15 unpaid hours in a family business or on a family farm, during the week including the 12th of the month. Those who were on vacation, on other kinds of leave, or involved in a labor dispute, were also counted as employed.

Civilian unemployment includes those individuals who were not working but were able, available, and actively looking for work during the week including the 12th of the month. Individuals who were waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days were also considered to be unemployed.

Wages Family Compositions: The living wage calculator estimates the living wage needed to support families. For single adult families, the adult is assumed to be employed full time. For two adult families where both adults are in the labor force, both adults are assumed to be employed full time. For two adult families where one adult is not in the labor force, one of the adults is assumed to be employed full time while the other non-wage-earning adult provides full-time child care for the family's children. Full-time work is assumed to be year-round, 40 hours per week for 52 weeks, per adult. Families with one child are assumed to have a 'young child' (4 years old). Families with two children are assumed to have a 'young child' and a 'child' (9 years old). Families with three children are assumed to have a 'young child,' a 'child,' and a 'teenager' (15 years old).