

# Labor Market Overview: Mother Lode Sub-Region

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Central/Mother Lode Region



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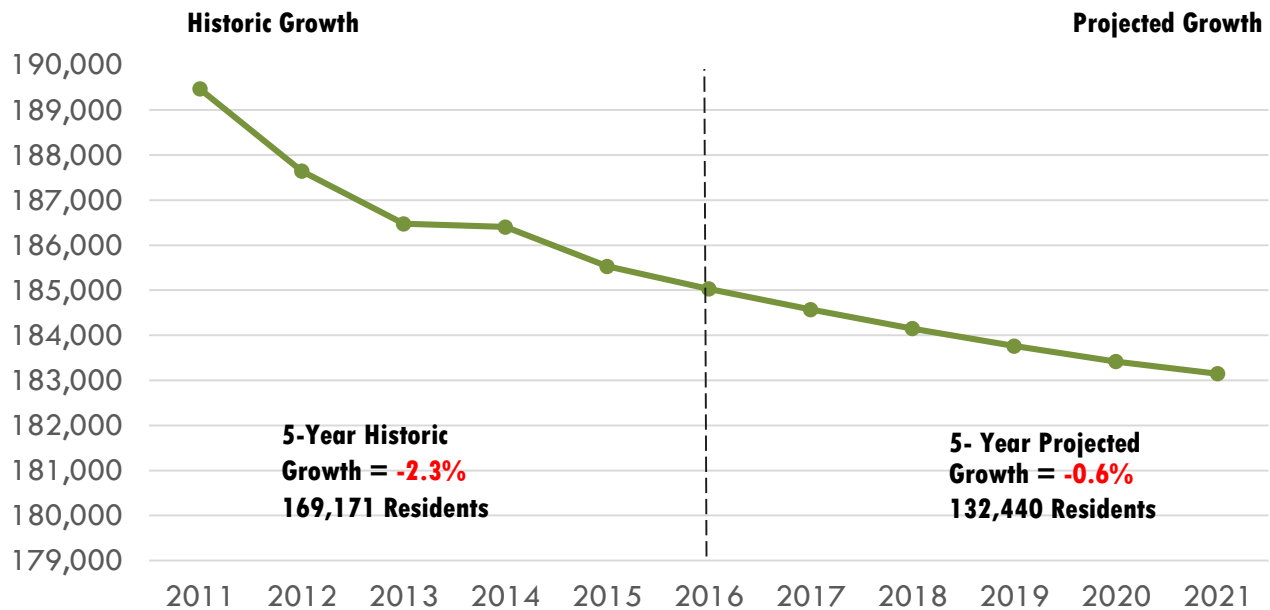
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## Regional Population Characteristics

### Residential Population

The Mother Lode Sub-Region is comprised of seven counties: **Alpine, Amador, Calaveras, Inyo, Mariposa, Mono, and Tuolumne**. The residential population numbered close to 185,000 in 2016, with 1,882 fewer residents projected by 2021. This is a projected loss of 0.6%. California, as a whole, has a projected growth rate of 3.1% in the next five years. Over the last five years, the Mother Lode Sub-Regional population reduced by 2.3%.

**Exhibit 1: Central Valley/Motherlode 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 Mother Lode Sub-Regional labor force has decreased in size by 3,540 persons, indicating an exit of working age individuals from the workforce of 4%. Total employment decreased by 6,200 persons. While the total number of employed persons decreased, there is a higher percentage of workers in the total labor force than five years ago. The unemployment rate decreased from 13% in 2011 (compared to 11.5% statewide) to 6% 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	85,750	82,210	(3,540)
Employment	74,710	77,400	2,690
Unemployment	11,040	4,840	(6,200)
Unemployment Rate	13%	6%	-7%

## Demographic Overview

The Mother Lode Sub-Region demographics will change somewhat in the next five years with a projected decline of more than 1,800 people (4%) by 2021. Hispanics currently represent 14% of the total population with an expected increase to 15% by 2021.

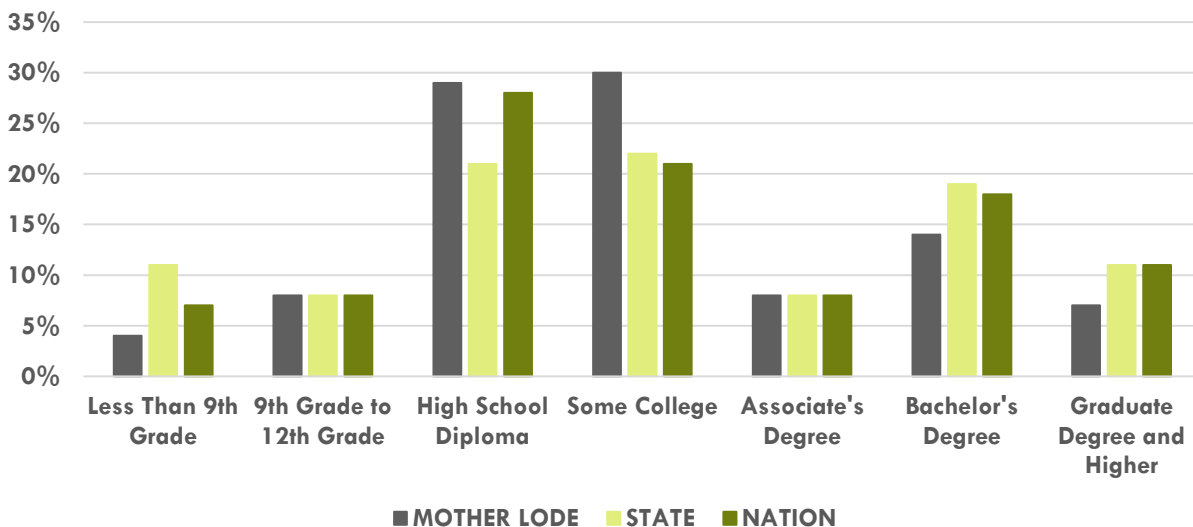
**Exhibit 3: Ethnicity/Race Changes, 2011-2016**

Race/Ethnicity	2016 Population	2021 Population	Change	% Change
White, Non-Hispanic	143,477	139,769	(3,708)	-3%
White, Hispanic	22,494	23,523	1,029	5%
Two or More Races, Non-Hispanic	4,915	5,154	239	5%
American Indian or Alaskan Native, Non-Hispanic	4,789	4,800	11	0%
Asian, Non-Hispanic	2,504	2,722	218	9%
Black, Non-Hispanic	2,503	2,376	(127)	-5%
American Indian or Alaskan Native, Hispanic	1,780	1,939	159	9%
Two or More Races, Hispanic	1,520	1,674	154	10%
Native Hawaiian or Pacific Islander, Non-Hispanic	332	368	36	11%
Asian, Hispanic	331	381	50	15%
Black, Hispanic	299	342	43	14%
Native Hawaiian or Pacific Islander, Hispanic	87	99	12	14%
<b>Total</b>	<b>185,031</b>	<b>183,148</b>	<b>(1,882)</b>	<b>-1%</b>

## Educational Attainment

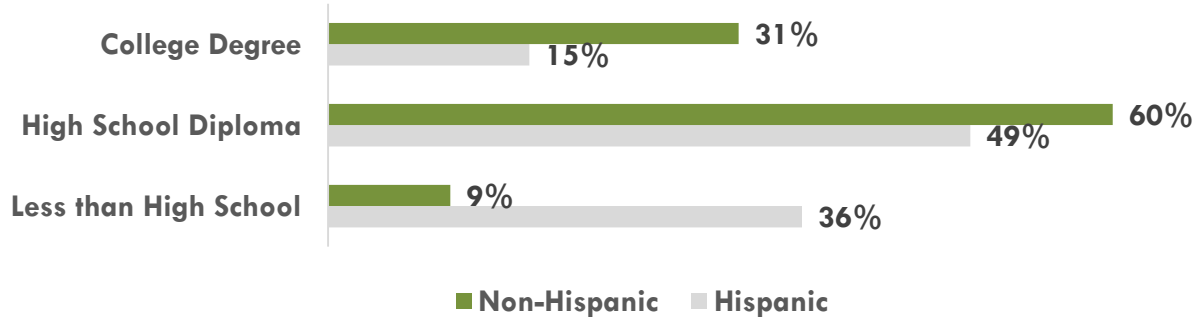
Postsecondary educational attainment in the Mother Lode Sub-Region is lower than statewide and nationwide rates in every category except for Some College and Associate’s degree. Only 21% of the adult population holds a Bachelor’s or graduate degree, compared to 30% statewide and 29% nationwide. Within the Mother Lode Sub-Region, 41% of the population has a high school diploma or less, which is highly reflective of the state (40%) and national (43%) rates.

**Exhibit 4: Educational Attainment, 2016 Percent of Population**



Hispanic educational attainment in the Mother Lode Sub-Region is lower than non-Hispanic educational attainment. Only 15% of the Hispanic population earned a college degree (Associate’s degree or higher) compared to 31% of the non-Hispanic population. Conversely, 36% of the Hispanic population did not complete high school, compared to 9% of the non-Hispanic population.

**Exhibit 5: 2016 Hispanic/Non-Hispanic Educational Attainment**

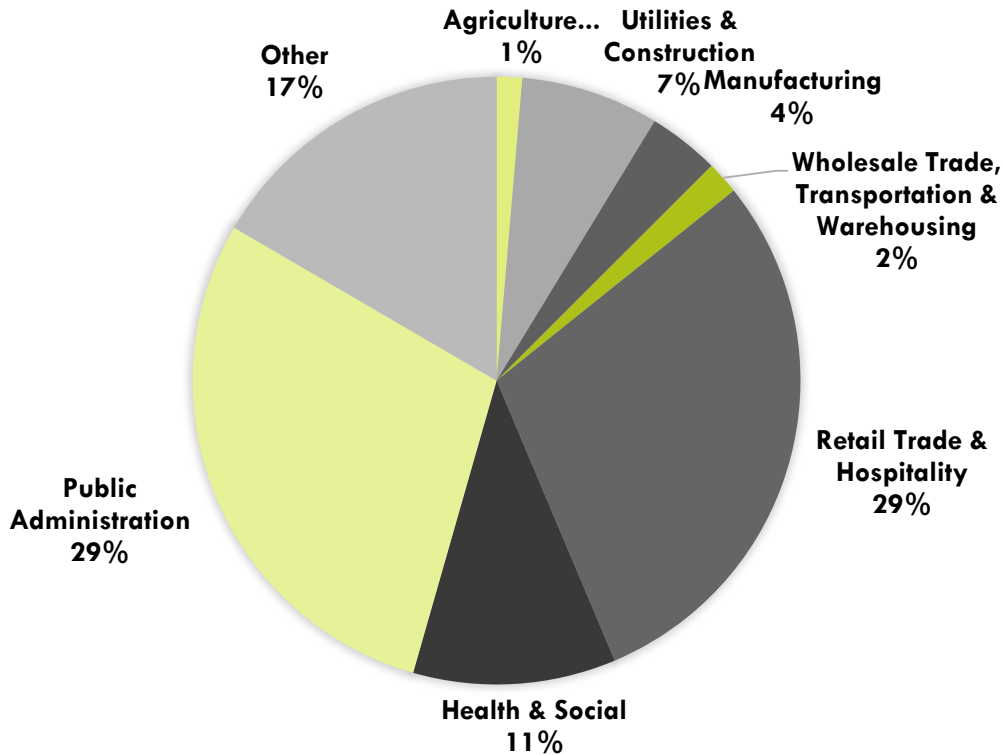


## Industry Employment

### Employment Composition

The Mother Lode Sub-Region has nearly 67,000 jobs as of April 2016. In the chart below, employment is distributed into eight major industrial groupings. The largest shares of employment are attributed to Retail Trade and Hospitality, Public Administration, and Healthcare and Social Assistance. These are followed by Utilities and Construction, and Manufacturing. The smallest employment shares aggregated into the “Other” category represent regional non-priority industry groups with less than 5% of the total jobs in the Sub-Region.

**Exhibit 6: Mother Lode Sub-Region 2016 Employment by Industry Groups**



## Retail Trade Sector

The majority of 2016 retail jobs are with supermarkets and other grocery stores, followed by discount department stores and gasoline stations with convenience stores. This latter firm type has a five-year projected decline of 2% (11 jobs). Overall, this sector has a growth forecast of 6% over the next five years, adding 465 new positions.

**Exhibit 7: 2016 Retail Jobs**

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Supermarkets and Other Grocery (except Convenience) Stores	1,788	1,877	89	5%	50
Discount Department Stores	775	830	55	7%	8
Gasoline Stations with Convenience Stores	554	543	(11)	-2%	79
Pharmacies and Drug Stores	346	311	(35)	-10%	26
Pet and Pet Supplies Stores	337	455	118	35%	9
Home Centers	324	310	(14)	-4%	12
Sporting Goods Stores	308	326	18	6%	33
Hardware Stores	224	277	53	24%	23
All Other General Merchandise Stores	220	275	55	25%	18
New Car Dealers	211	239	28	13%	10
Other Building Material Dealers	209	247	38	18%	17
Automotive Parts and Accessories Stores	199	205	6	3%	21
Used Merchandise Stores	162	157	(5)	-3%	9
Paint and Wallpaper Stores	154	231	77	50%	6
Fuel Dealers	149	119	(30)	-20%	15
Gift, Novelty, and Souvenir Stores	110	66	(44)	-40%	17
Nursery, Garden Center, and Farm Supply Stores	106	121	15	14%	14
Beer, Wine, and Liquor Stores	105	131	26	25%	15
Convenience Stores	92	104	12	13%	15
Floor Covering Stores	77	63	(14)	-18%	8
Book Stores	73	96	23	32%	8
All Other Miscellaneous Store Retailers (except Tobacco Stores)	69	69	-	0%	7
Family Clothing Stores	69	60	(9)	-13%	8
Tobacco Stores	66	76	10	15%	7
Furniture Stores	64	57	(7)	-11%	12
Tire Dealers	62	61	(1)	-2%	13
Other Direct Selling Establishments	57	41	(16)	-28%	2
Electronic Shopping	56	70	14	25%	4
All Other Home Furnishings Stores	56	54	(2)	-4%	9
All Other Specialty Food Stores	55	47	(8)	-15%	6
Food (Health) Supplement Stores	55	71	16	29%	8
Sewing, Needlework, and Piece Goods Stores	50	57	7	14%	8
Electronics Stores	45	42	(3)	-7%	10
Art Dealers	41	46	5	12%	3
Florists	37	28	(9)	-24%	7
Office Supplies and Stationery Stores	36	30	(6)	-17%	4
Jewelry Stores	33	26	(7)	-21%	7
Mail-Order Houses	31	37	6	19%	2
Warehouse Clubs and Supercenters	31	41	10	32%	1
Vending Machine Operators	30	36	6	20%	1
Women's Clothing Stores	30	28	(2)	-7%	11
All Other Combined	223	224	1	0%	32
<b>Total</b>	<b>7,722</b>	<b>8,182</b>	<b>465</b>	<b>6%</b>	<b>572</b>

### Healthcare and Social Assistance Sector

The majority of 2016 healthcare and social assistance jobs are with general medical and surgical hospitals, followed by services for the elderly and persons with disabilities, and offices of physicians. Although child day care services have the seventh largest number of jobs, there is an expected 5% decline over the 5-year period. Overall, this sector has a 12% growth projection, which adds 833 new positions by 2021.

**Exhibit 8: 2016 Healthcare and Social Assistance Jobs**

Description	2016	2021	2016 - 2021	2016 - 2021	2015
	Jobs	Jobs	Change	% Change	Firms
General Medical and Surgical Hospitals	1,616	1,723	107	7%	3
Services for the Elderly and Persons with Disabilities	1,309	1,623	314	24%	913
Offices of Physicians (except Mental Health Specialists)	606	609	3	0%	148
Nursing Care Facilities (Skilled Nursing Facilities)	583	639	56	10%	6
Offices of Dentists	472	475	3	1%	65
Assisted Living Facilities for the Elderly	326	411	85	26%	16
Child Day Care Services	322	307	(15)	-5%	34
Home Health Care Services	285	333	48	17%	11
Ambulance Services	215	214	(1)	0%	5
Other Individual and Family Services	199	220	21	11%	29
Child and Youth Services	133	173	40	30%	5
Other Residential Care Facilities	124	161	37	30%	1
Vocational Rehabilitation Services	102	121	19	19%	3
Residential Intellectual and Developmental Disability Facilities	81	96	15	19%	8
Offices of Optometrists	78	75	(3)	-4%	11
Offices of Physical, Occupational and Speech Therapists, and Audiologists	70	67	(3)	-4%	14
Temporary Shelters	68	87	19	28%	3
Offices of Chiropractors	59	46	(13)	-22%	17
Residential Mental Health and Substance Abuse Facilities	58	62	4	7%	3
Offices of All Other Miscellaneous Health Practitioners	54	57	3	6%	3
Outpatient Mental Health and Substance Abuse Centers	52	73	21	40%	1
HMO Medical Centers	43	62	19	44%	4
All Other Outpatient Care Centers	42	51	9	21%	2
Offices of Mental Health Practitioners (except Physicians)	39	41	2	5%	4
Medical Laboratories	38	51	13	34%	4
Kidney Dialysis Centers	29	<10	Insf. Data	Insf. Data	1
Freestanding Ambulatory Surgical and Emergency Centers	28	42	14	50%	2
Blood and Organ Banks	28	36	8	29%	0
Specialty (except Psychiatric and Substance Abuse) Hospitals	22	30	8	36%	1
Community Food Services	15	12	(3)	-20%	3
Other Community Housing Services	15	20	5	33%	1
All Other Miscellaneous Ambulatory Health Care Services	14	12	(2)	-14%	-
	<b>7,125</b>	<b>7,929</b>	<b>833</b>	<b>12%</b>	<b>1,319</b>



## Manufacturing Sector

In 2016, the majority of manufacturing jobs were in wineries, followed by sawmills, explosives manufacturing, and machine shops. Overall, this sector has a growth projection of 9% during the five-year period. There are declines in sawmills, industrial process furnace and oven manufacturing and poultry processing eliminating 54 total positions in those areas.

**Exhibit 9: 2016 Manufacturing Jobs**

Description	2016	2021	2016 - 2021	2016 - 2021	2015
	Jobs	Jobs	Change	% Change	
Wineries	541	612	71	13%	45
Sawmills	324	304	(20)	-6%	5
Explosives Manufacturing	272	319	47	17%	1
Machine Shops	172	198	26	15%	13
Bottled Water Manufacturing	99	117	18	18%	1
Meat Processed from Carcasses	90	115	25	28%	1
Wood Kitchen Cabinet and Countertop Manufacturing	86	96	10	12%	9
Reconstituted Wood Product Manufacturing	65	<10	Insf. Data	Insf. Data	1
Poultry Processing	64	49	(15)	-23%	2
Food Product Machinery Manufacturing	54	54	-	0%	1
Printed Circuit Assembly (Electronic Assembly) Manufacturing	51	87	36	71%	2
All Other Miscellaneous Manufacturing	48	46	(2)	-4%	7
Commercial Printing (except Screen and Books)	42	36	(6)	-14%	8
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	42	43	1	2%	3
Industrial Process Furnace and Oven Manufacturing	39	20	(19)	-49%	1
Confectionery Manufacturing from Purchased Chocolate	38	32	(6)	-16%	2
Soft Drink Manufacturing	37	39	2	5%	1
Glass Product Manufacturing Made of Purchased Glass	33	42	9	27%	1
All Other Plastics Product Manufacturing	32	37	5	16%	4
Sign Manufacturing	31	31	-	0%	3
Steel Foundries (except Investment)	26	37	11	42%	3
Cut Stock, Resawing Lumber, and Planing	24	21	(3)	-13%	0
Retail Bakeries	22	28	6	27%	3
Power, Distribution, and Specialty Transformer Manufacturing	21	24	3	14%	1
Nonupholstered Wood Household Furniture Manufacturing	21	19	(2)	-10%	3
Ready-Mix Concrete Manufacturing	20	22	2	10%	3
Other Industrial Machinery Manufacturing	18	25	7	39%	1
Sporting and Athletic Goods Manufacturing	18	18	-	0%	1
Other Electronic Component Manufacturing	18	16	(2)	-11%	1
Pulp Mills	17	<10	Insf. Data	Insf. Data	0
Industrial Mold Manufacturing	16	18	2	13%	3
Commercial Screen Printing	16	14	(2)	-13%	4
Computer Terminal and Other Computer Peripheral Equipment Manufacturing	15	16	1	7%	1
Other Aircraft Parts and Auxiliary Equipment Manufacturing	15	<10	Insf. Data	Insf. Data	2
Breweries	14	16	2	14%	4
Cut and Sew Apparel Contractors	13	13	-	0%	1
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	13	15	2	15%	1
Machine Tool Manufacturing	12	17	5	42%	1
Dental Laboratories	12	12	-	0%	4
Iron and Steel Forging	11	18	7	64%	1
Cut Stone and Stone Product Manufacturing	10	13	3	30%	1
<b>Total</b>	<b>2,510</b>	<b>2,637</b>	<b>224</b>	<b>9%</b>	<b>151</b>

### Agriculture Sector

In 2016, the majority of agriculture jobs were in logging, crop production, and animal production and aquaculture. All but two of the eight agriculture firm types are indicating declines during the five-year period. Farm labor contractors and crew leaders show the greatest percentage reduction with crop production indicating the largest numerical reduction. This sector overall has a forecasted decline of 3% between 2016 and 2021, but this percentage represents only 25 jobs.

**Exhibit 10: 2016 Agriculture Jobs**

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Logging	187	181	(6)	-3%	21
Crop Production	183	166	(17)	-9%	34
Animal Production and Aquaculture	167	151	(16)	-10%	39
Soil Preparation, Planting, and Cultivating	128	154	26	20%	7
Farm Labor Contractors and Crew Leaders	94	82	(12)	-13%	6
Support Activities for Animal Production	76	74	(2)	-3%	5
Support Activities for Forestry	33	29	(4)	-12%	4
Finfish Fishing	16	22	6	38%	-
<b>Total</b>	<b>884</b>	<b>859</b>	<b>(25)</b>	<b>-3%</b>	<b>115</b>

## Occupational Employment

### Job Posting Trends

Burning Glass<sup>1</sup>, an online job posting aggregation tool, was utilized to identify occupations with the most job openings in the Mother Lode Sub-Region. 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 01, 2015 - April 30, 2016); and,
3. The job posting indicated the position was physically located in one of the fourteen Regional counties.

There were 2,829 job postings identified as a possible match. More than one-third of the postings were for nurses. Exhibit 11 shows the top twenty job postings during the one-year period (accounting for 62% of the postings). Registered Nurses was the only occupation showing a significant demand in terms of total job postings. The industries with the most job postings include healthcare and social services (38%) and accommodation and food service (13%). Following these were public administration (10%), retail trade (8%) and educational services (3%).

### Exhibit 11: 2016 Job Postings Requiring a High School Diploma or Vocational Training, or Associate Degree, Mother Lode Sub-Region

Occupational Title	# of Job Postings	% of Total	2016 Hourly Wages
Registered Nurses	877	31%	\$46.02
Retail Salespersons	116	4%	\$11.95
Critical Care Nurses	99	3%	\$46.02
First-Line Supervisors of Retail Sales Workers	87	3%	\$15.75
Maids and Housekeeping Cleaners	57	2%	\$10.66
Customer Service Representatives	54	2%	\$15.69
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	54	2%	\$17.03
Teacher Assistants	53	2%	\$13.88
Maintenance and Repair Workers, General	51	2%	\$18.75
Security Guards	44	2%	\$13.32
Combined Food Preparation and Serving Workers, Including Fast Food	34	1%	\$9.71
Coaches and Scouts	32	1%	\$16.13
Patient Representatives	29	1%	\$15.69
Cooks, Restaurant	27	1%	\$13.42
Forest and Conservation Technicians	27	1%	\$15.21
Medical Assistants	27	1%	\$16.44
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	27	1%	\$22.07
Park Naturalists	26	1%	\$23.02
Hotel, Motel, and Resort Desk Clerks	23	1%	\$11.48
Merchandise Displayers and Window Trimmers	23	1%	\$10.92

<sup>1</sup> 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.

Three of the top 20 occupations posted in the last twelve months exceed the average hourly living wage for one adult and one child (Register Nurses, Critical Care Nurses, and Park Naturalists).

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

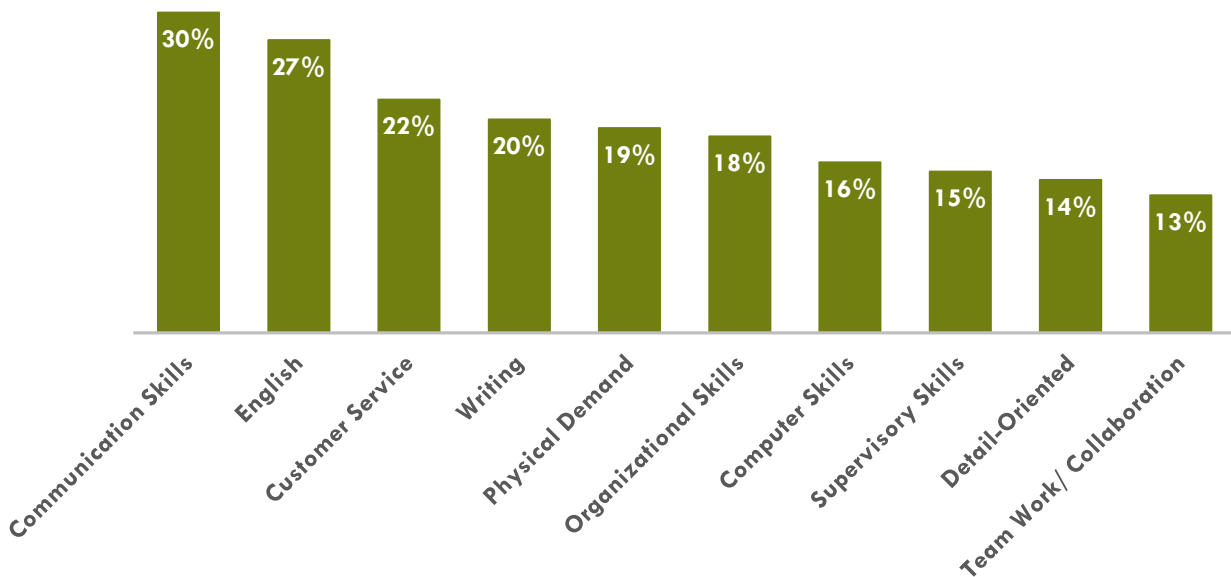
Hourly Wages	1 Adult	1 Adult 1 Child	1 Adult 2 Children	1 Adult 3 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children	2 Adults 3 Children
<b>Living Wage</b>	\$ 11.06	\$ 22.94	\$ 26.51	\$ 32.90	\$ 8.71	\$ 12.62	\$ 14.63	\$ 16.86
<b>Poverty Wage</b>	\$ 5.00	\$ 7.00	\$ 9.00	\$ 11.00	\$ 3.00	\$ 4.00	\$ 5.00	\$ 6.00
<b>Minimum Wage</b>	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00

**High Demand Skills**

Of the 2,829 jobs posted in the Mother Lode Sub-Region between May 2015 and April 2016, 70% of them had listed skills.

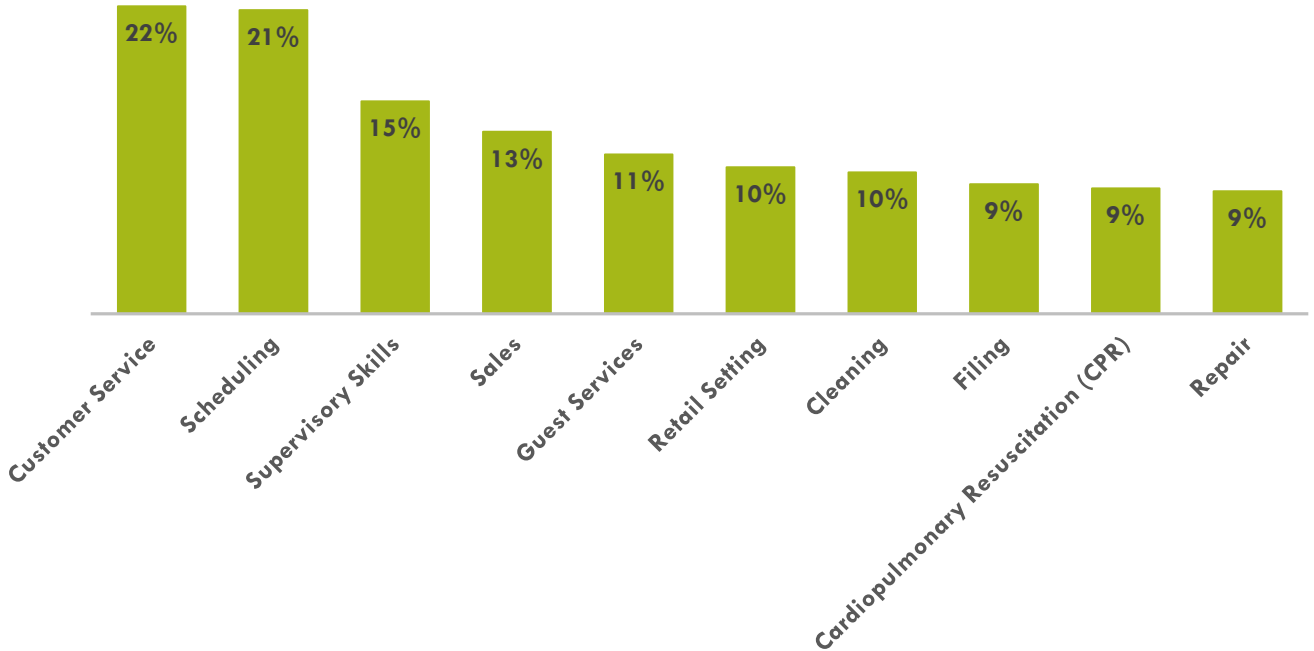
**Baseline Skills:** The baseline skills listed most frequently among the 1,968 postings included communication skills (30%), English (27%), and customer service (22%).

**Exhibit 13: Baseline Skills in Greatest Demand**



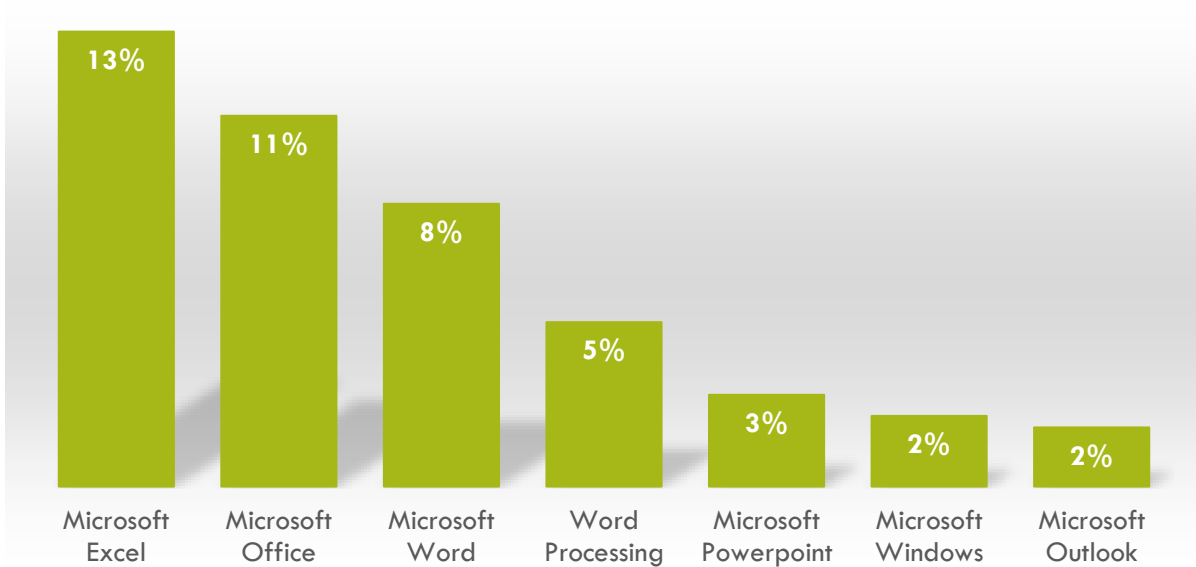
**Specialized Skills:** The specialized skills most frequently listed among the 1,968 postings were customer service (22%), scheduling (21%), and supervisory skills (16%).

**Exhibit 14: Specialized Skills in Greatest Demand**



There were 1,081 software specifications noted among the 2,829 postings. Of these 1,081 specifications, 43% were for a Microsoft product, and 13% were specific to Excel.

**Exhibit 15: Software Skills in Greatest Demand**



## Appendix A: Sources, Terms and Definitions

This labor market report was prepared for the Central Region Consortium by the Central/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 – <http://www.economicmodeling.com>

Labor force, employment and unemployment estimates – California Employment Development Department, Labor Market Information Division, [labormarketinfo.edd.ca.gov](http://labormarketinfo.edd.ca.gov)

Industry and occupational employment estimates and projections, wages and other data – Economic Modeling Specialists Inc. (EMSI), [economicmodeling.com](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 Armed Services, 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).