

Labor Market Overview: North Central Valley Sub-Region

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Center of Excellence
Central/Mother Lode Region



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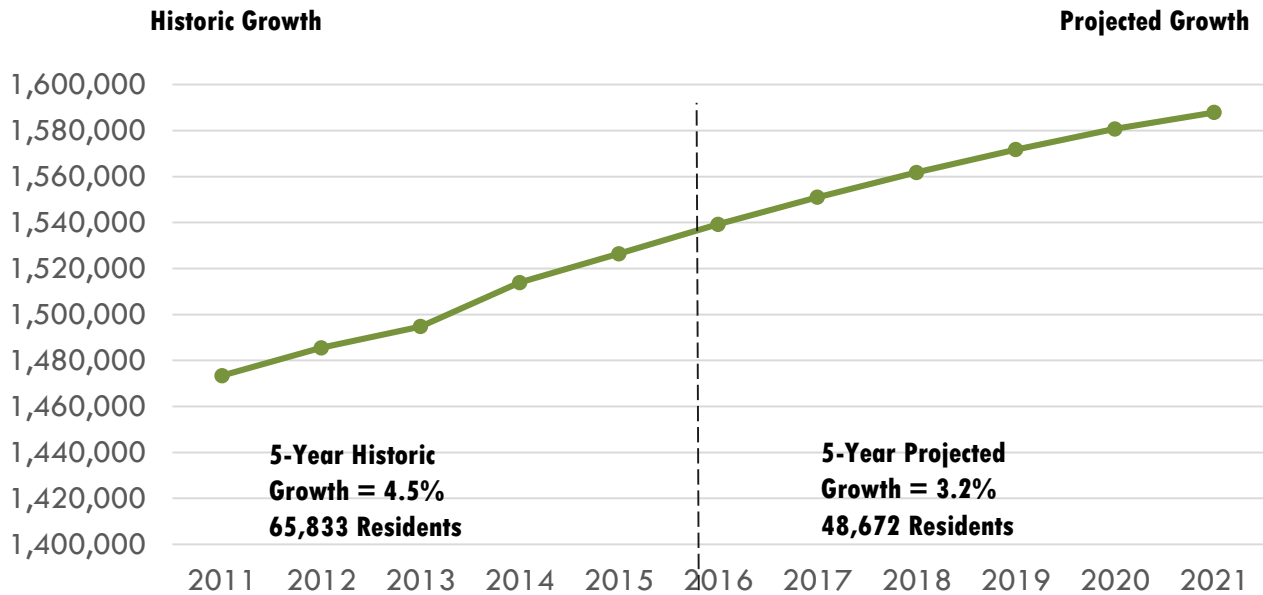
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Regional Population Characteristics

Residential Population

The North Central Valley Sub-Region is comprised of three counties: **San Joaquin, Stanislaus and Merced**. The residential population numbered close to 1,540,000 in 2016, with an additional 48,672 residents projected by 2021. Over the last five years, the North Central Valley Sub-Region grew by 4.5%, somewhat slower than the state’s growth of 4.7%. The projected growth rate of 3.2% is somewhat slower than in the previous five years, and nearly matches the projected 3.1% growth rate for the state.

Exhibit 1: North Central Valley Sub-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 North Central Valley Sub-Region labor force has increased in size by 29,800 persons, indicating an entrance of working age individuals into the workforce of 2.6%. Total employment increased by 97,500 persons. Because total employment increased more than the labor force, the unemployment rate decreased from 16% 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	1,137,800	1,167,600	29,800
Employment	950,800	1,048,300	97,500
Unemployment	186,900	119,400	(67,500)
Unemployment Rate	16%	10%	-6%

Demographic Overview

The North Central Valley Sub-Region demographics will change somewhat in the next five years. The total Hispanic population in the Sub-Region is projected to be 47% by 2021, an increase of one percentage point from 2016.

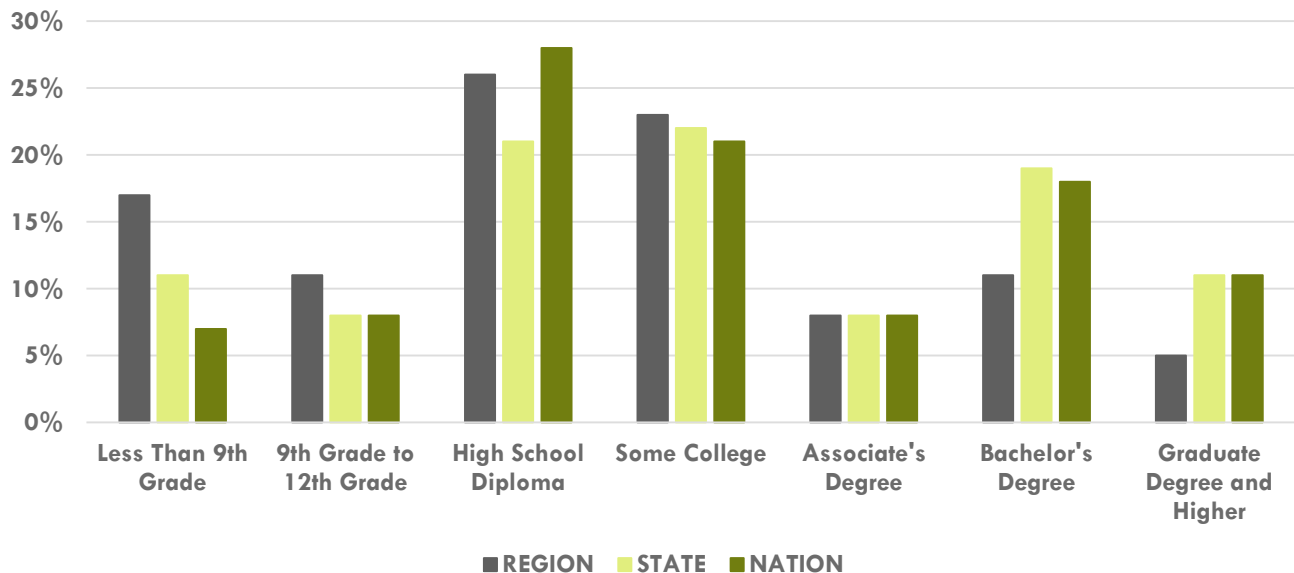
Exhibit 3: Ethnicity/Race Changes, 2016-2021

Race/Ethnicity	2016 Population	2021 Population	Change	% Change
White, Hispanic	616,022	654,595	38,573	6%
White, Non-Hispanic	550,298	537,878	(12,420)	-2%
Asian, Non-Hispanic	155,358	164,363	9,005	6%
Black, Non-Hispanic	72,645	74,228	1,583	2%
Two or More Races, Non-Hispanic	42,827	45,758	2,931	7%
Two or More Races, Hispanic	25,789	28,749	2,960	11%
American Indian or Alaskan Native, Hispanic	25,091	27,455	2,364	9%
Asian, Hispanic	16,947	18,338	1,391	8%
Black, Hispanic	15,347	16,655	1,308	9%
Native Hawaiian or Pacific Islander, Non-Hispanic	8,418	9,247	829	10%
American Indian or Alaskan Native, Non-Hispanic	7,254	7,137	(117)	-2%
Native Hawaiian or Pacific Islander, Hispanic	3,260	3,527	267	8%
Total	1,539,256	1,587,928	48,672	3%

Educational Attainment

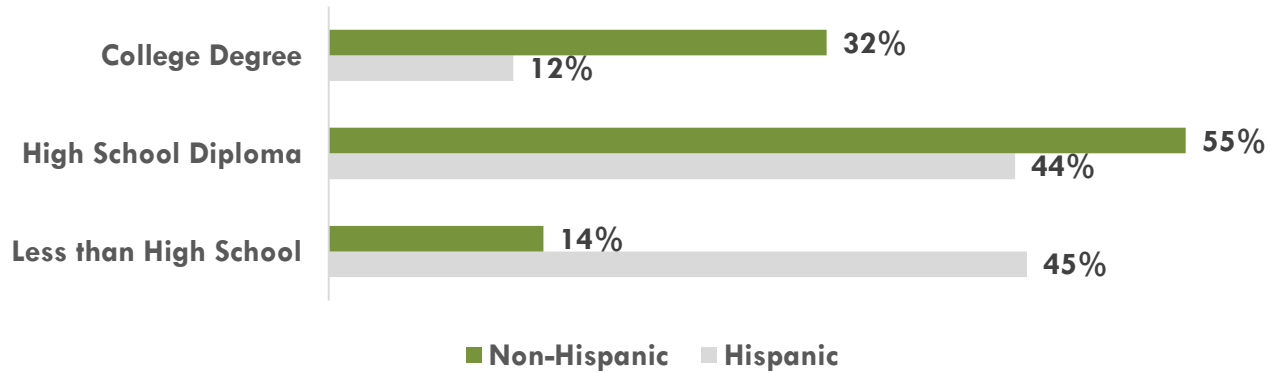
Educational attainment in the North Central Valley Sub-Region is lower than statewide or nationwide rates in every category except Associate’s degree attainment. Only 16% of the adult population holds a Bachelor’s or graduate degree, compared to 30% statewide and 29% nationwide. Within the North Central Valley Sub-Region, 52% of the population has a high school diploma or less, compared to 40% statewide and 43% nationwide.

Exhibit 4: 2016 Educational Attainment



Hispanic educational attainment in the North Central Valley Sub-Region is lower than non-Hispanic educational attainment. Only 12% of the Hispanic population earned a college degree (Associate’s degree or higher) compared to 32% of the non-Hispanic population. Conversely, 45% of the Hispanic population did not complete high school, compared to 14% of the non-Hispanic population.

Exhibit 5: 2016 Hispanic/Non-Hispanic Educational Attainment

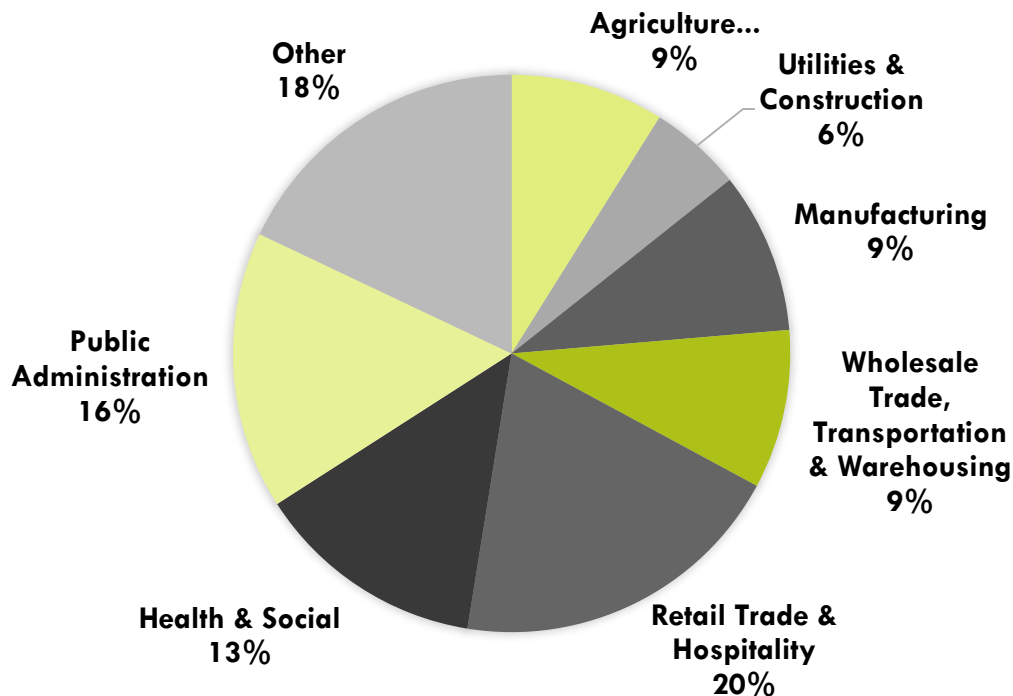


Industry Employment

Employment Composition

In 2016, there are nearly 554,000 jobs in the **North Central Valley Sub-Region**. In the chart below, this 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 manufacturing, wholesale trade, transportation and warehousing. The smallest shares of employment that are 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: 2016 North Central Valley Sub-Region County Industry Employment by Major Groups



Healthcare and Social Assistance Sector

In 2016, the majority of healthcare and social assistance jobs were with services for the elderly and persons with disabilities, followed by general hospitals, physicians' offices, and nursing care facilities. Overall, this sector is projected to grow by 13% over the next five years (9,509 new positions), with major growth in services for the elderly and persons with disabilities, HMOs, and home healthcare services. The largest numeric declines are projected in general hospitals and child day care services.

Exhibit 7: 2016 Healthcare 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	14,353	18,642	4,289	30%	11,457
General Medical and Surgical Hospitals	12,959	12,140	(819)	-6%	26
Offices of Physicians (except Mental Health Specialists)	8,477	9,179	702	8%	834
Nursing Care Facilities (Skilled Nursing Facilities)	6,425	7,361	936	15%	74
Home Health Care Services	4,345	6,058	1,713	39%	61
Offices of Dentists	3,925	4,145	220	6%	537
HMO Medical Centers	3,789	5,269	1,480	39%	14
Child Day Care Services	3,671	3,103	(568)	-15%	199
Assisted Living Facilities for the Elderly	1,660	1,685	25	2%	92
Child and Youth Services	1,308	1,544	236	18%	35
Other Individual and Family Services	1,228	1,102	(126)	-10%	82
Continuing Care Retirement Communities	1,100	1,364	264	24%	14
Ambulance Services	1,040	1,232	192	18%	12
Residential Mental Health and Substance Abuse Facilities	1,004	1,225	221	22%	32
Offices of Physical, Occupational and Speech Therapists, and Audiologists	900	1,107	207	23%	71
Vocational Rehabilitation Services	885	926	41	5%	33
Kidney Dialysis Centers	758	924	166	22%	36
Outpatient Mental Health and Substance Abuse Centers	739	923	184	25%	21
Residential Intellectual and Developmental Disability Facilities	595	441	(154)	-26%	55
Offices of Optometrists	540	547	7	1%	82
Offices of Chiropractors	443	388	(55)	-12%	132
Other Residential Care Facilities	408	391	(17)	-4%	36
Family Planning Centers	408	449	41	10%	31
Offices of Mental Health Practitioners (except Physicians)	384	442	58	15%	18
Diagnostic Imaging Centers	356	398	42	12%	14
All Other Outpatient Care Centers	334	423	89	27%	11
Offices of All Other Miscellaneous Health Practitioners	301	345	44	15%	25
Medical Laboratories	280	302	22	8%	50
Psychiatric and Substance Abuse Hospitals	205	261	56	27%	2
Freestanding Ambulatory Surgical and Emergency Centers	175	130	(45)	-26%	18
All Other Miscellaneous Ambulatory Health Care Services	172	209	37	22%	7
Temporary Shelters	170	124	(46)	-27%	18
Community Food Services	156	166	10	6%	9
Other Community Housing Services	122	156	34	28%	8
Specialty (except Psychiatric and Substance Abuse) Hospitals	101	136	35	35%	1
Offices of Physicians, Mental Health Specialists	98	87	(11)	-11%	31
Blood and Organ Banks	69	64	(5)	-7%	5
Offices of Podiatrists	58	52	(6)	-10%	16
Emergency and Other Relief Services	57	67	10	18%	7
Total	73,997	83,506	9,509	13%	14,202

Retail 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. Overall, this sector is projected to increase by 5% over the next five years, adding over 3,000 new positions. Department stores (except discount department stores) are expected to experience the largest decline at 42%.

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	8,960	8,984	24	0%	326
Discount Department Stores	7,061	7,766	705	10%	53
Warehouse Clubs and Supercenters	4,299	5,731	1,432	33%	17
New Car Dealers	3,617	3,298	(319)	-9%	88
Home Centers	3,139	3,419	280	9%	35
Pharmacies and Drug Stores	2,877	2,899	22	1%	194
Gasoline Stations with Convenience Stores	2,363	2,461	98	4%	276
All Other General Merchandise Stores	1,895	2,233	338	18%	101
Automotive Parts and Accessories Stores	1,810	1,893	83	5%	165
Electronics Stores	1,598	1,710	112	7%	120
Department Stores (except Discount Department Stores)	1,594	928	(666)	-42%	16
Family Clothing Stores	1,451	1,519	68	5%	72
Other Building Material Dealers	1,446	1,602	156	11%	70
Sporting Goods Stores	1,304	1,573	269	21%	80
Used Car Dealers	930	1,130	200	22%	64
Women's Clothing Stores	914	1,136	222	24%	77
Hardware Stores	862	881	19	2%	53
Used Merchandise Stores	829	902	73	9%	47
Tire Dealers	810	799	(11)	-1%	102
Hobby, Toy, and Game Stores	690	699	9	1%	40
Shoe Stores	669	736	67	10%	79
Other Gasoline Stations	651	661	10	2%	32
Convenience Stores	623	708	85	14%	112
Office Supplies and Stationery Stores	593	495	(98)	-17%	28
Cosmetics, Beauty Supplies, and Perfume Stores	569	718	149	26%	43
Nursery, Garden Center, and Farm Supply Stores	536	503	(33)	-6%	42
Pet and Pet Supplies Stores	504	543	39	8%	29
Furniture Stores	494	425	(69)	-14%	67
All Other Miscellaneous Store Retailers (except Tobacco Stores)	461	453	(8)	-2%	57
Other Clothing Stores	458	532	74	16%	35
Jewelry Stores	440	380	(60)	-14%	74
All Other Home Furnishings Stores	438	509	71	16%	29
Other Direct Selling Establishments	434	338	(96)	-22%	17
Beer, Wine, and Liquor Stores	422	371	(51)	-12%	98
Gift, Novelty, and Souvenir Stores	406	339	(67)	-17%	37
Meat Markets	387	397	10	3%	42
Recreational Vehicle Dealers	307	327	20	7%	11
Sewing, Needlework, and Piece Goods Stores	271	321	50	18%	15
Motorcycle, ATV, and All Other Motor Vehicle Dealers	269	241	(28)	-10%	20
Optical Goods Stores	244	306	62	25%	23
Florists	244	183	(61)	-25%	34
All Other Combined	3,770	3,683	(87)	-2%	402
Total	61,635	64,732	3,093	5%	3,319

Manufacturing Sector

In 2016, the majority of manufacturing jobs were in wineries, fruit and vegetable canning, and poultry processing. However, two of these three areas have declining projections over the five-year period. Overall, this sector is projected to remain fairly stable adding 121 over the next five years.

Exhibit 9: Manufacturing Jobs in the North Central Valley Sub-Region, 2015

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Wineries	5,894	6,457	563	10%	70
Fruit and Vegetable Canning	5,378	5,140	(238)	-4%	23
Poultry Processing	3,751	3,455	(296)	-8%	75
Cheese Manufacturing	1,814	1,904	90	5%	11
Dried and Dehydrated Food Manufacturing	1,510	1,436	(74)	-5%	10
Commercial Printing (except Screen and Books)	1,427	1,177	(250)	-18%	41
Corrugated and Solid Fiber Box Manufacturing	1,336	1,586	250	19%	9
Fluid Milk Manufacturing	1,331	1,459	128	10%	10
Meat Processed from Carcasses	1,273	1,364	91	7%	12
Roasted Nuts and Peanut Butter Manufacturing	1,215	884	(331)	-27%	8
Fabricated Structural Metal Manufacturing	1,158	1,390	232	20%	22
Glass Container Manufacturing	1,019	931	(88)	-9%	4
Other Animal Food Manufacturing	979	980	1	0%	36
Commercial Bakeries	849	835	(14)	-2%	13
All Other Miscellaneous Food Manufacturing	833	997	164	20%	5
Frozen Fruit, Juice, and Vegetable Manufacturing	827	907	80	10%	4
Wood Kitchen Cabinet and Countertop Manufacturing	785	885	100	13%	36
Farm Machinery and Equipment Manufacturing	758	945	187	25%	12
Other Snack Food Manufacturing	692	719	27	4%	2
Metal Can Manufacturing	605	454	(151)	-25%	6
Wet Corn Milling	603	698	95	16%	2
Machine Shops	590	605	15	3%	67
Other Motor Vehicle Parts Manufacturing	576	511	(65)	-11%	1
Ready-Mix Concrete Manufacturing	564	560	(4)	-1%	18
All Other Plastics Product Manufacturing	525	707	182	35%	14
Other Paperboard Container Manufacturing	515	572	57	11%	5
Other Concrete Product Manufacturing	501	622	121	24%	10
Truck Trailer Manufacturing	487	500	13	3%	10
Truss Manufacturing	450	348	(102)	-23%	7
Prefabricated Metal Building and Component Manufacturing	437	364	(73)	-17%	6
All Other Miscellaneous Fabricated Metal Product Manufacturing	391	447	56	14%	14
Soft Drink Manufacturing	380	513	133	35%	4
Wood Container and Pallet Manufacturing	356	351	(5)	-1%	16
Sheet Metal Work Manufacturing	332	315	(17)	-5%	15
Other Aircraft Parts and Auxiliary Equipment Manufacturing	314	364	50	16%	1
Nonupholstered Wood Household Furniture Manufacturing	302	197	(105)	-35%	7
All Other Combined	10,976	10,002	(701)	-6%	446
Total	51,733	51,581	121	0%	1,049

Agriculture Sector

In 2016, the majority of agriculture jobs were in crop production, followed by farm labor and animal production with two of these three firm types indicating decreases over the five-year period. Overall, this sector is projected to grow by 2% in the next five years.

Exhibit 10: 2016 Agriculture Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Crop Production	19,039	19,037	(2)	0%	1,554
Farm Labor Contractors and Crew Leaders	12,647	13,351	704	6%	166
Animal Production and Aquaculture	9,352	8,837	(515)	-6%	629
Postharvest Crop Activities (except Cotton Ginning)	4,951	5,289	338	7%	120
Soil Preparation, Planting, and Cultivating	1,004	1,064	60	6%	98
Crop Harvesting, Primarily by Machine	925	1,033	108	12%	74
Farm Management Services	880	975	95	11%	39
Support Activities for Animal Production	361	343	(18)	-5%	44
Support Activities for Forestry	35	57	22	63%	2
Forest Nurseries and Gathering of Forest Products	28	32	4	14%	6
Finfish Fishing	24	31	7	29%	-
Hunting and Trapping	12	13	1	8%	1
Shellfish Fishing	11	14	3	27%	-
Total	49,268	50,078	807	2%	2,733

Occupational Employment

Job Posting Trends

Burning Glass¹, an online job posting aggregation tool, was utilized to identify occupations with the most job openings in the North Central Valley 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 training*, 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 either San Joaquin, Stanislaus or Merced County.

There were 22,381 job postings were identified as a possible match. Nearly one-fifth of the postings were for nurses. Exhibit 11 shows the top twenty job postings 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. The industries with the most job postings include healthcare and social services (27%) and retail trade (14%), followed by educational services (12%), and manufacturing (9%).

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.

Exhibit 11: Job Postings a High School Diploma or Vocational Training, or an Associate’s Degree in the North Central Valley Sub-Region

Occupational Title	# of Job Postings	% of Total	2016 Hourly Wages
Registered Nurses	3,721	17%	\$46.15
Retail Salespersons	1,134	5%	\$10.80
First-Line Supervisors of Retail Sales Workers	737	3%	\$16.95
Customer Service Representatives	607	3%	\$16.13
Teacher Assistants	584	3%	\$14.55
Critical Care Nurses	520	2%	\$46.15
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	489	2%	\$16.51
Laborers and Freight, Stock, and Material Movers, Hand	475	2%	\$13.21
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	474	2%	\$27.45
Maintenance and Repair Workers, General	426	2%	\$18.65
Security Guards	373	2%	\$10.69
Managers, All Other	297	1%	\$29.72
Coaches and Scouts	270	1%	\$18.93
Merchandise Displayers and Window Trimmers	269	1%	\$13.81
Bookkeeping, Accounting, and Auditing Clerks	267	1%	\$17.29
Combined Food Preparation and Serving Workers, Including Fast Food	204	1%	\$9.77
Stock Clerks- Stockroom, Warehouse, or Storage Yard	203	1%	\$11.56
First-Line Supervisors of Office and Administrative Support Workers	197	1%	\$23.60
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	188	1%	\$13.20
Office Clerks, General	186	1%	\$14.47

Five occupations of the top 20 posted in the last twelve months exceed the average hourly living wage for one adult and one child; Registered Nurses, Critical Care Nurses, Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products, and Managers, All Other.

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

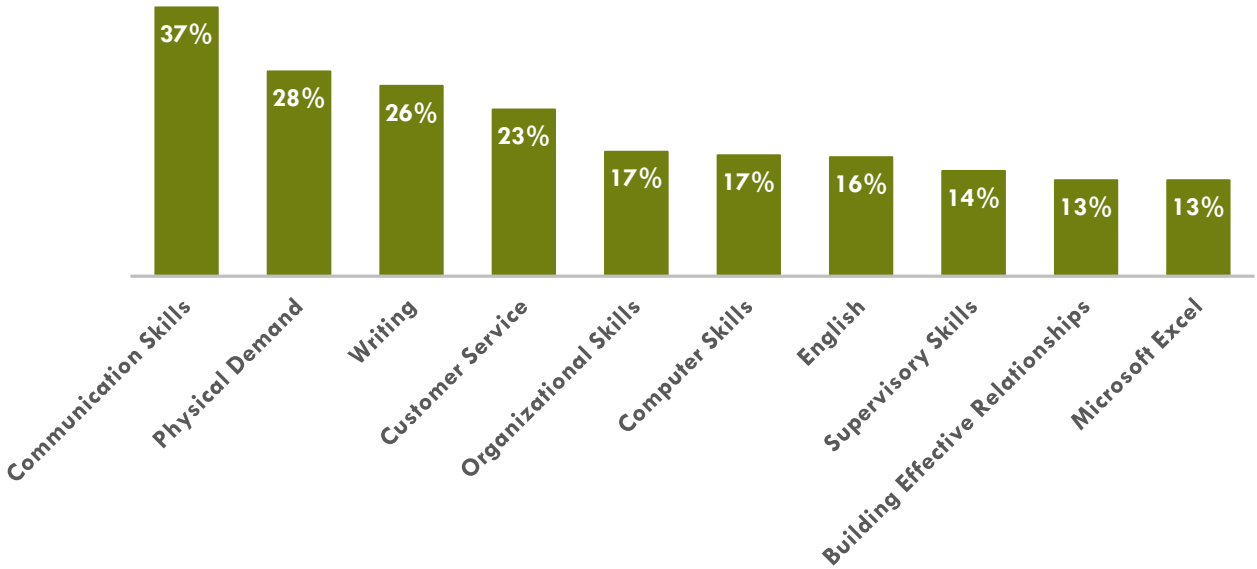
Hourly Wages	1 Adult	1 Adult 1 Child	1 Adult 2 Children	1 Adult 3 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children	2 Adults 3 Children
Living Wage	\$ 10.27	\$ 22.31	\$ 25.88	\$ 32.74	\$ 8.42	\$ 12.30	\$ 14.32	\$ 16.78
Poverty Wage	\$ 5.00	\$ 7.00	\$ 9.00	\$ 11.00	\$ 3.00	\$ 4.00	\$ 5.00	\$ 6.00
Minimum Wage	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00

High Demand Skills

Of the 22,381 jobs posted in the North Central Valley Sub-Region between May 2015 and April 2016, 78% of them had listed skills.

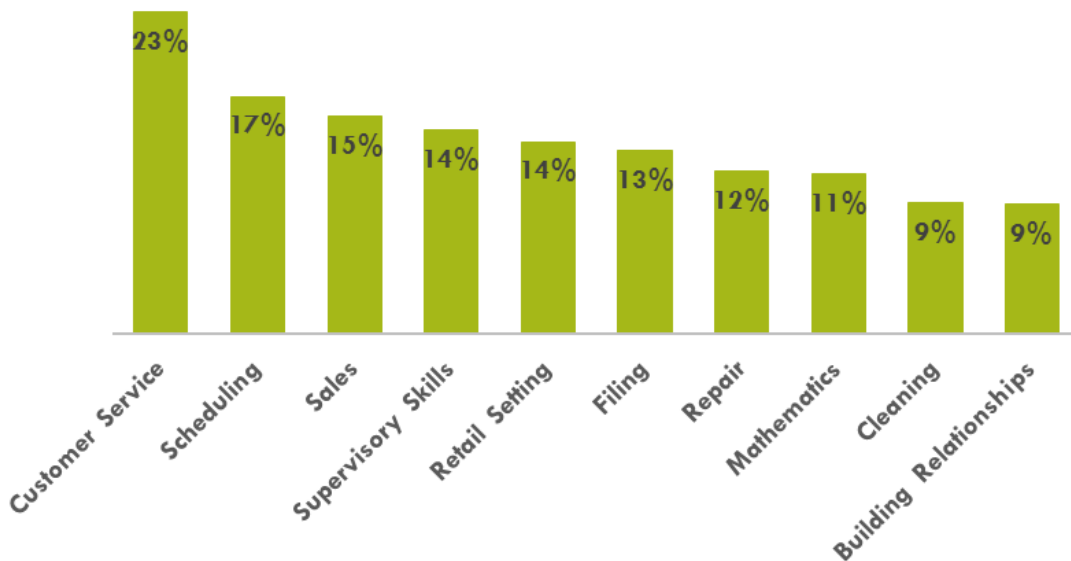
Baseline Skills: The baseline skills listed most frequently among the 17,529 postings included communication skills (37%), physical demand (28%), writing skills (26%) and customer service (23%).

Exhibit 13: Baseline Skills in Greatest Demand



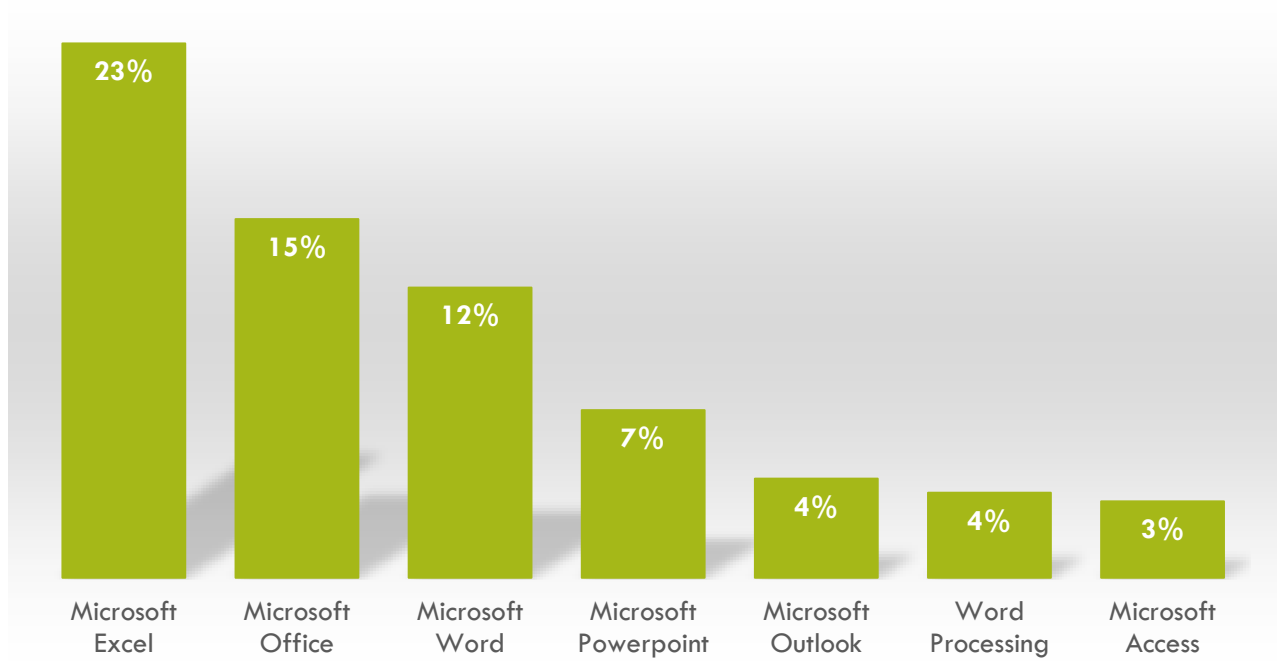
Specialized Skills: The specialized listed most frequently among the 17,529 postings were customer service (23%), scheduling (17%), and sales (15%).

Exhibit 14: Specialty Skills in Greatest Demand



There were a total of 10,047 software specifications noted among the 22,381 postings. Of these 10,047 specifications, 69% were for a Microsoft product, and 23% 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

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).