

Labor Market Overview: South Central Valley Sub-Region

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Center of Excellence
Central/Mother Lode Region

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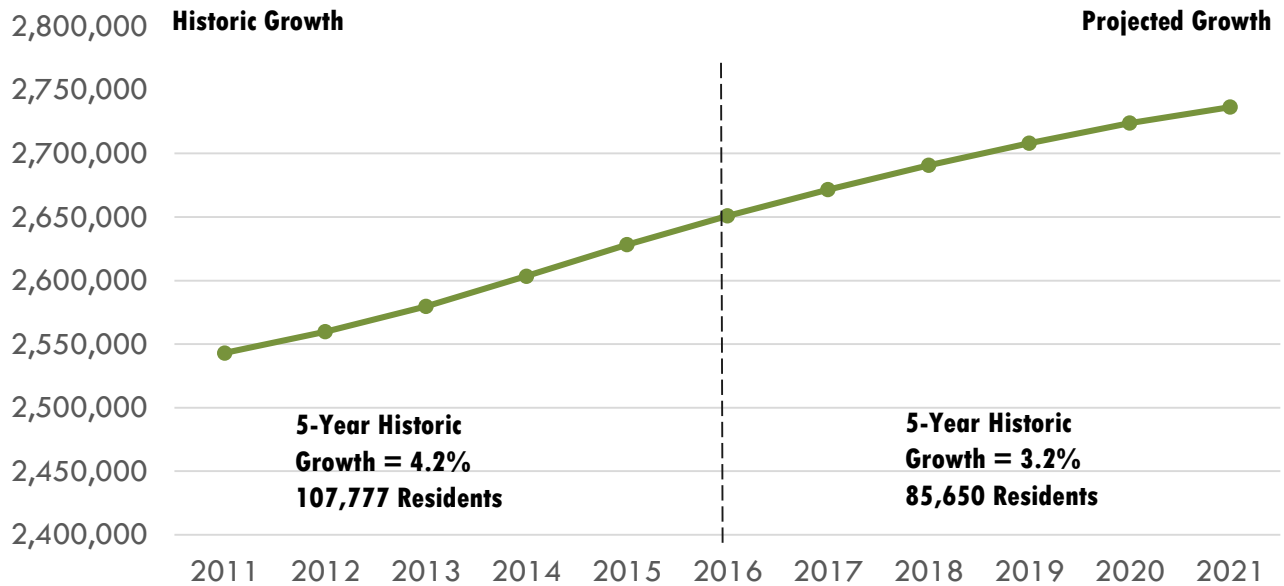
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Regional Population Characteristics

Residential Population

The South Central Valley Sub-Region is comprised of five counties: **Fresno, Kern, Kings, Madera, and Tulare**. The residential population numbered nearly 2,651,000 in 2016, with an additional 85,650 residents projected by 2021. Over the last five years, the South Central Valley Sub-Region grew by 4.2%, somewhat slower than state’s growth of 4.7%. The projected growth rate of 3.2% nearly matches the projected growth rate for the state of 3.1%.

Exhibit 1: South 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 South Central Valley Sub-Region labor force has increased in size by 25,700 persons, indicating an entrance of working age individuals into the workforce of 4%. Total employment increased by 77,500 persons. Because the total employment increased more than the labor force, the unemployment rate decreased from 17% percent in 2011 (compared to 11.5% statewide) to 9% 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	649,900	675,600	25,700
Employment	537,500	615,000	77,500
Unemployment	112,400	60,500	(51,900)
Unemployment Rate	17%	9%	-8%

Demographic Overview

The South Central Valley Sub-Region demographics will change somewhat in the next five years. The total population in the Sub-Region is projected to grow by 85,650 people over the five-year period. More than half of the population is Hispanic with an expected increase to 54% by 2021.

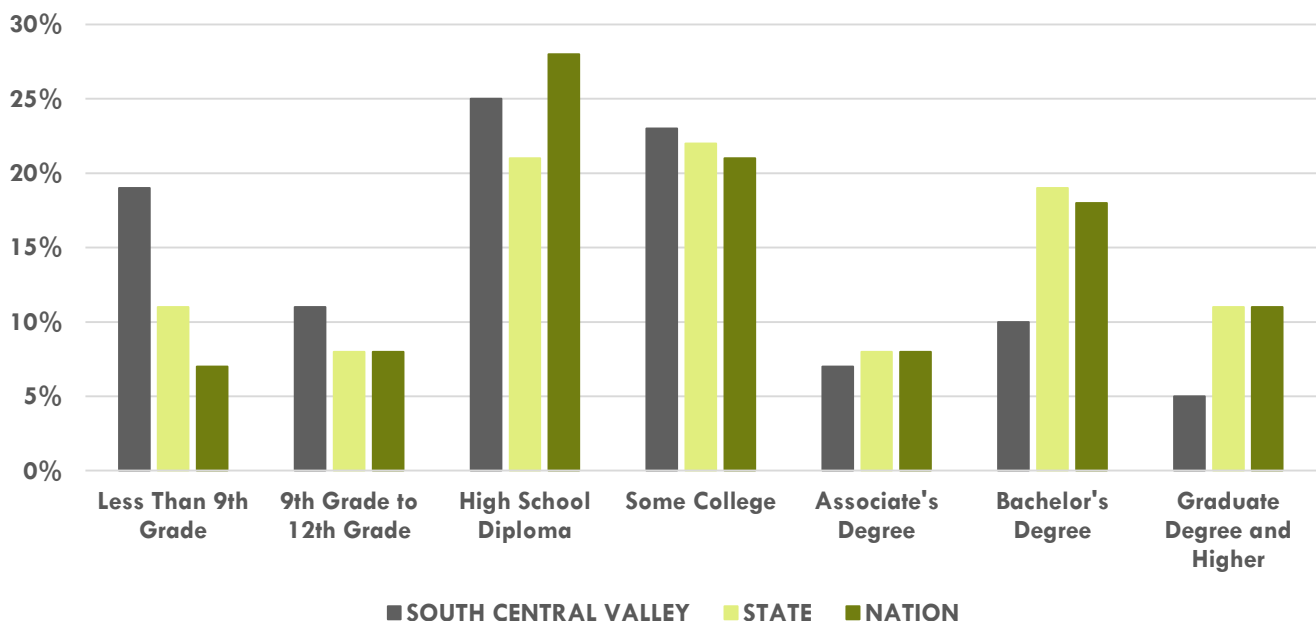
Exhibit 3: Ethnicity/Race Changes, 2011-2016

Race/Ethnicity	2016 Population	2021 Population	Change	% Change
White, Hispanic	1,313,266	1,391,198	77,932	6%
White, Non-Hispanic	847,708	826,156	(21,552)	-3%
Asian, Non-Hispanic	163,737	175,094	11,357	7%
Black, Non-Hispanic	112,580	113,754	1,174	1%
American Indian or Alaskan Native, Hispanic	61,231	66,460	5,229	9%
Two or More Races, Non-Hispanic	46,835	49,982	3,147	7%
Two or More Races, Hispanic	32,692	36,493	3,801	12%
Black, Hispanic	28,439	31,026	2,587	9%
Asian, Hispanic	19,248	20,926	1,678	9%
American Indian or Alaskan Native, Non-Hispanic	18,021	17,773	(248)	-1%
Native Hawaiian or Pacific Islander, Hispanic	3,847	4,151	304	8%
Native Hawaiian or Pacific Islander, Non-Hispanic	3,301	3,542	241	7%
Total	2,650,905	2,736,555	85,650	3%

Educational Attainment

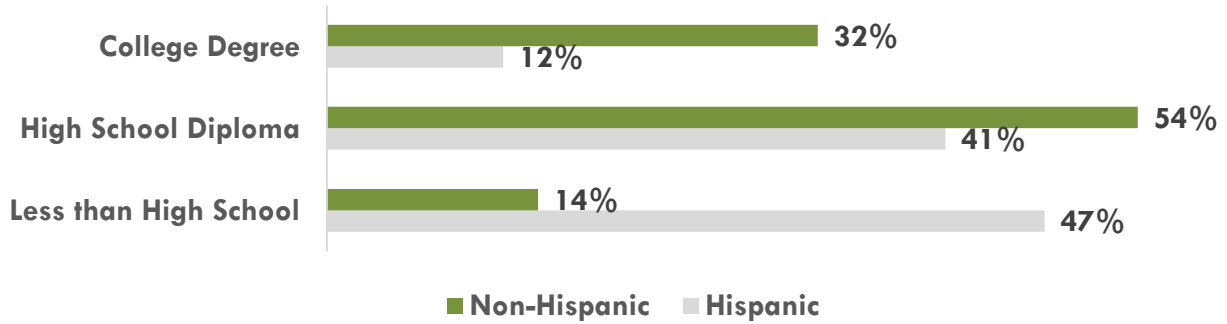
Educational attainment in the South Central Valley Sub-Region is lower than state or national rates in nearly every category except Some College. Only 15% of the adult population holds a Bachelor's or graduate degree, which is half the percentage rate of either the state or nation. Within the Sub-Region, 55% 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 South 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, 47% 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

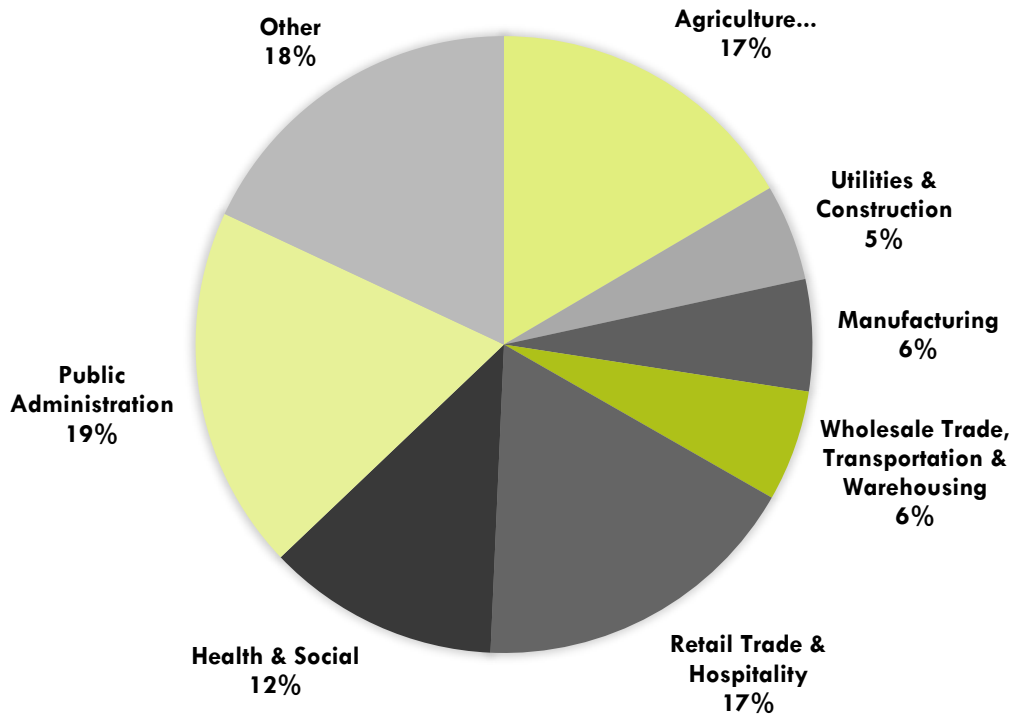


Industry Employment

Employment Composition

As of April 2016, there were more than one million jobs in **South 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 Public Administration, Retail Trade and Hospitality, Agriculture, and Healthcare and Social Assistance. The shares that are aggregated within the “Other” category represent regional non-priority industry groups with less than 5% of the total jobs in the sub-region.

Exhibit 6: 2016 South Central Valley Sub-Region Industry Employment by Major Groups



Healthcare and Social Assistance Sector

In 2016, the majority of healthcare & social assistance jobs were with services for the elderly and persons with disabilities, followed by hospitals and physicians' offices. Major growth is projected in HMOs, services for the elderly and persons with disabilities, and home healthcare services. This sector has an overall growth projection of 13% within the next five years adding 16,882 new positions.

Exhibit 7: 2016 Healthcare and Social Assistance Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Establishments
Services for the Elderly and Persons with Disabilities	28,051	35,531	7,480	27%	21,028
General Medical and Surgical Hospitals	26,548	28,746	2,198	8%	32
Offices of Physicians (except Mental Health Specialists)	17,129	18,404	1,275	7%	1,686
Child Day Care Services	8,484	8,247	(237)	-3%	264
Nursing Care Facilities (Skilled Nursing Facilities)	7,509	8,207	698	9%	94
Offices of Dentists	5,801	6,006	205	4%	810
Home Health Care Services	3,445	4,195	750	22%	106
Vocational Rehabilitation Services	3,376	3,527	151	4%	86
Assisted Living Facilities for the Elderly	2,904	3,520	616	21%	161
Residential Intellectual and Developmental Disability Facilities	2,038	2,022	(16)	-1%	132
Child and Youth Services	1,842	1,914	72	4%	81
Other Individual and Family Services	1,740	1,628	(112)	-6%	129
HMO Medical Centers	1,651	2,361	710	43%	14
Continuing Care Retirement Communities	1,563	1,974	411	26%	22
Offices of Physical, Occupational and Speech Therapists, and Audiologists	1,428	1,706	278	19%	116
All Other Outpatient Care Centers	1,397	1,937	540	39%	52
Ambulance Services	1,274	1,450	176	14%	32
Residential Mental Health and Substance Abuse Facilities	1,158	1,384	226	20%	55
Offices of Optometrists	1,084	1,284	200	18%	121
Offices of Mental Health Practitioners (except Physicians)	1,068	1,321	253	24%	53
Other Residential Care Facilities	1,001	879	(122)	-12%	81
Kidney Dialysis Centers	877	1,093	216	25%	42
Diagnostic Imaging Centers	842	1,105	263	31%	41
Outpatient Mental Health and Substance Abuse	813	927	114	14%	48
Offices of Chiropractors	767	727	(40)	-5%	172
Medical Laboratories	691	698	7	1%	115
Freestanding Ambulatory Surgical and Emergency Centers	586	745	159	27%	32
Offices of All Other Miscellaneous Health Practitioners	483	569	86	18%	43
Temporary Shelters	384	445	61	16%	13
Blood and Organ Banks	264	263	(1)	0%	5
Community Food Services	239	292	53	22%	16
Family Planning Centers	220	264	44	20%	10
All Other Miscellaneous Ambulatory Health Care Services	218	247	29	13%	7
Other Community Housing Services	196	199	3	2%	13
Specialty (except Psychiatric and Substance Abuse) Hospitals	188	271	83	44%	4
Offices of Podiatrists	177	188	11	6%	37
Offices of Physicians, Mental Health Specialists	168	164	(4)	-2%	38
Psychiatric and Substance Abuse Hospitals	100	147	47	47%	3
Emergency and Other Relief Services	52	51	(1)	-2%	7
	127,754	144,638	16,882	13%	25,793

Retail Sector

In 2016, the majority of retail jobs were with supermarkets and other grocery stores, discount department stores and warehouse clubs and supercenters. Overall, this sector is projected to increase by 7% over the next five years, adding 7,461 new positions. Department stores (except Discount Department Stores) are expected to decline by 50% (1,147 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	16,259	17,857	1,598	10%	554
Discount Department Stores	9,786	9,873	87	1%	87
Warehouse Clubs and Supercenters	6,662	9,294	2,632	40%	26
New Car Dealers	6,603	6,785	182	3%	131
Pharmacies and Drug Stores	4,870	4,935	65	1%	388
Home Centers	4,581	5,121	540	12%	59
Gasoline Stations with Convenience Stores	4,000	3,878	(122)	-3%	486
All Other General Merchandise Stores	3,330	4,253	923	28%	238
Automotive Parts and Accessories Stores	3,299	3,518	219	7%	301
Electronics Stores	3,098	3,490	392	13%	222
Family Clothing Stores	3,073	3,419	346	11%	144
Department Stores (except Discount Department Stores)	2,297	1,150	(1,147)	-50%	20
Hobby, Toy, and Game Stores	2,285	3,095	810	35%	63
Women's Clothing Stores	1,979	2,483	504	25%	153
Convenience Stores	1,600	1,740	140	9%	243
Sporting Goods Stores	1,543	1,672	129	8%	105
Tire Dealers	1,503	1,555	52	3%	183
Shoe Stores	1,415	1,667	252	18%	131
Hardware Stores	1,395	1,510	115	8%	109
Used Merchandise Stores	1,309	1,443	134	10%	86
Furniture Stores	1,303	1,187	(116)	-9%	114
Other Gasoline Stations	1,290	1,263	(27)	-2%	52
Used Car Dealers	1,251	1,456	205	16%	102
Other Building Material Dealers	1,006	744	(262)	-26%	106
Other Direct Selling Establishments	933	869	(64)	-7%	29
Jewelry Stores	834	752	(82)	-10%	108
Nursery, Garden Center, and Farm Supply Stores	830	813	(17)	-2%	71
Gift, Novelty, and Souvenir Stores	830	725	(105)	-13%	77
Cosmetics, Beauty Supplies, and Perfume Stores	824	1,073	249	30%	66
Other Clothing Stores	812	866	54	7%	58
All Other Home Furnishings Stores	801	905	104	13%	51
Office Supplies and Stationery Stores	799	689	(110)	-14%	48
Beer, Wine, and Liquor Stores	756	763	7	1%	179
All Other Miscellaneous Store Retailers (except Tobacco Stores)	740	682	(58)	-8%	100
Pet and Pet Supplies Stores	711	777	66	9%	51
Sewing, Needlework, and Piece Goods Stores	585	628	43	7%	23
All Other Specialty Food Stores	560	420	(140)	-25%	45
Meat Markets	552	617	65	12%	45
Children's and Infants' Clothing Stores	445	588	143	32%	33
Florists	441	377	(64)	-15%	61
Tobacco Stores	427	492	65	15%	52
Motorcycle, ATV, and All Other Motor Vehicle Dealers	417	382	(35)	-8%	31
All Other Combined	5,356	5,044	(311)	-6%	548
Total	103,390	110,850	7,461	7%	5,773

Manufacturing Sector

In 2016, the majority of manufacturing jobs were in poultry processing, fruit and vegetable canning, roasted nuts and peanut butter manufacturing and cheese manufacturing. Overall, this sector is projected to increase by 4% over the next five years, adding 2,493 positions. Manufacturing industries expected to experience the largest declines include radio and television broadcasting and wireless communications equipment (303 jobs) dried and dehydrated food (256 jobs) and commercial printing (240 jobs). Small gains in other manufacturing firm types will help offset these losses.

Exhibit 9: 2016 Manufacturing Jobs

Description	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2015 Firms
Poultry Processing	4,308	4,776	468	11%	39
Fruit and Vegetable Canning	3,679	3,586	(93)	-3%	19
Roasted Nuts and Peanut Butter Manufacturing	3,302	4,027	725	22%	15
Cheese Manufacturing	2,605	2,856	251	10%	14
Animal (except Poultry) Slaughtering	2,478	2,596	118	5%	5
Perishable Prepared Food Manufacturing	2,157	2,414	257	12%	7
Frozen Specialty Food Manufacturing	2,053	2,078	25	1%	4
Wineries	1,448	1,618	170	12%	59
Frozen Fruit, Juice, and Vegetable Manufacturing	1,385	1,439	54	4%	9
Ice Cream and Frozen Dessert Manufacturing	1,268	1,451	183	14%	6
Corrugated and Solid Fiber Box Manufacturing	1,257	1,419	162	13%	13
Fluid Milk Manufacturing	1,148	1,190	42	4%	9
Dried and Dehydrated Food Manufacturing	1,096	840	(256)	-23%	17
Petroleum Refineries	940	1,100	160	17%	23
Other Animal Food Manufacturing	902	1,012	110	12%	30
Farm Machinery and Equipment Manufacturing	853	878	25	3%	43
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	836	533	(303)	-36%	6
Machine Shops	782	751	(31)	-4%	76
Other Snack Food Manufacturing	739	808	69	9%	3
Plastics Pipe and Pipe Fitting Manufacturing	722	761	39	5%	6
Soft Drink Manufacturing	715	692	(23)	-3%	4
Tortilla Manufacturing	707	675	(32)	-5%	5
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	646	980	334	52%	5
Commercial Printing (except Screen and Books)	636	396	(240)	-38%	63
Fabricated Structural Metal Manufacturing	624	586	(38)	-6%	18
Pump and Pumping Equipment Manufacturing	613	616	3	0%	14
Packaging Machinery Manufacturing	606	632	26	4%	7
Other Paperboard Container Manufacturing	551	640	89	16%	2
Meat Processed from Carcasses	545	695	150	28%	11
Motor Vehicle Body Manufacturing	534	577	43	8%	8
Retail Bakeries	514	476	(38)	-7%	47
All Other Combined	20,723	20,341	44	0%	790
Total	61,373	63,440	2,493	4%	1,375

Agriculture Sector

In 2016, the majority of agriculture jobs in the South Central Valley Sub-Region were farm labor contractors and crew leaders followed by crop production. Leading agricultural commodities include almonds, milk, grapes, and livestock. There are significant loss projections in crop production (3,424 jobs), animal production (831 jobs), crop harvesting (155 jobs), and cotton ginning (121 jobs). 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	81,583	89,627	8,044	10%	518
Crop Production	49,164	45,740	(3,424)	-7%	2,484
Animal Production and Aquaculture	15,778	14,947	(831)	-5%	705
Postharvest Crop Activities (except Cotton Ginning)	15,406	16,395	989	6%	166
Soil Preparation, Planting, and Cultivating	4,723	5,333	610	13%	201
Farm Management Services	4,160	4,249	89	2%	136
Crop Harvesting, Primarily by Machine	1,635	1,480	(155)	-9%	106
Support Activities for Animal Production	285	197	(88)	-31%	58
Forest Nurseries and Gathering of Forest Products	189	157	(32)	-17%	19
Cotton Ginning	170	49	(121)	-71%	23
Logging	98	86	(12)	-12%	9
Support Activities for Forestry	70	60	(10)	-14%	3
Finfish Fishing	25	32	7	28%	1
Hunting and Trapping	10	12	2	20%	1
Total	173,296	178,363	5,068	3%	4,429

Occupational Employment

Job Posting Trends

Burning Glass¹, an online job posting aggregation tool, was used to identify occupations with the most job openings in the Central Valley North Sub-Region. Job postings were selected for analysis based on three criteria:

1. The minimum education requirement was a High School Diploma or Vocational Training*, or Associate's degree;
2. The job posting was listed within the last 12 months (May 01, 2014 - April 30, 2015); and,
3. The job posting indicated the position was physically located in either Fresno, Kern, Kings, Madera, or Tulare County.

A total of 29,538 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 or 15,296 jobs). 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%) followed by retail trade (14%), government – educational services (10%), professional, scientific and technical services (6%), and manufacturing (6%).

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 Requiring a High School Diploma or Vocational Training, or Associate Degree, South Central Valley Sub-Region

Occupational Title	# of Job Postings	% of Total	2016 Median Hourly Wages
Registered Nurses	4,792	16%	\$38.73
Retail Salespersons	1,553	5%	\$10.83
First-Line Supervisors of Retail Sales Workers	1,052	4%	\$16.22
Customer Service Representatives	977	3%	\$15.47
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	809	3%	\$24.98
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	763	3%	\$16.06
Critical Care Nurses	731	2%	\$38.73
Maintenance and Repair Workers, General	546	2%	\$17.43
Merchandise Displayers and Window Trimmers	497	2%	\$12.61
Teacher Assistants	490	2%	\$13.12
Laborers and Freight, Stock, and Material Movers, Hand	388	1%	\$11.15
Bookkeeping, Accounting, and Auditing Clerks	363	1%	\$17.53
Managers, All Other	363	1%	\$30.05
Combined Food Preparation and Serving Workers, Including Fast Food	309	1%	\$9.70
Office Clerks, General	307	1%	\$13.37
Medical Assistant	280	1%	\$13.78
Security Guards	280	1%	\$10.49
First-Line Supervisors of Food Preparation and Serving Workers	268	1%	\$13.26
First-Line Supervisors of Office and Administrative Support Workers	267	1%	\$23.16
Medical Records and Health Information Technicians	261	1%	\$17.00

Five occupations of the top twenty posted in the last twelve months exceed the average hourly living wage for one adult and one child (Registered Nurses, Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products, Critical Care Nurses, Managers, All Other, and First-Line Supervisors of Office and Administrative Support Workers).

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

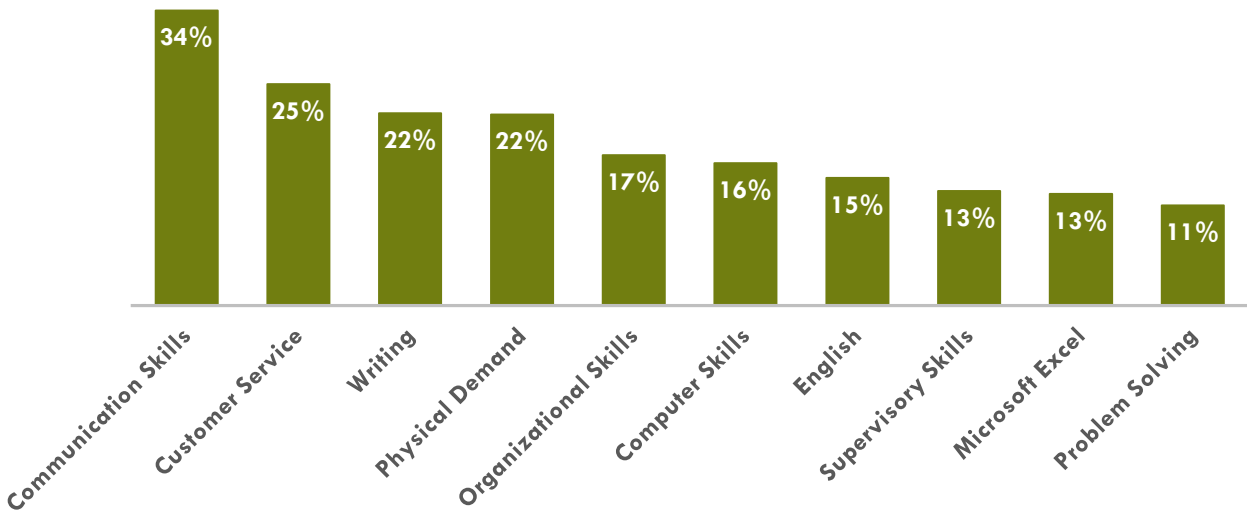
Hourly Wages	1 Adult	1 Adult 1 Child	1 Adult 2 Children	1 Adult 3 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children	2 Adults 3 Children
Living Wage	\$ 10.43	\$ 21.89	\$ 25.45	\$ 31.95	\$ 8.24	\$ 12.09	\$ 14.10	\$ 16.39
Poverty Wage	\$ 5.00	\$ 7.00	\$ 9.00	\$ 11.00	\$ 3.00	\$ 4.00	\$ 5.00	\$ 6.00
Minimum Wage	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00	\$ 9.00

High Demand Skills

Of the 29,538 jobs posted in the Central Valley/Mother Lode Region between May 2015 and April 2016, 78% of them had listed skills.

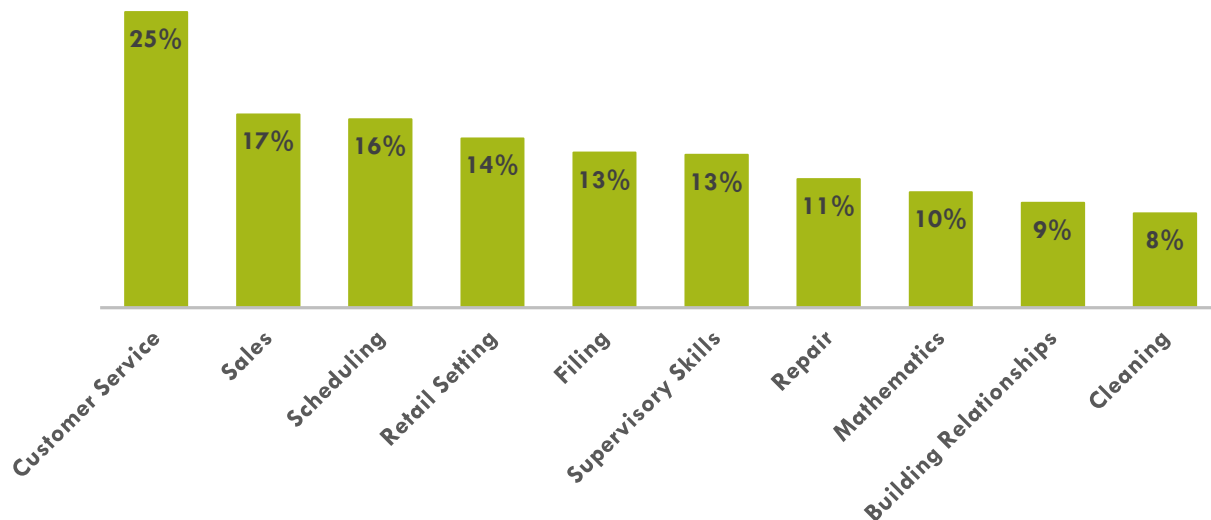
Baseline Skills: The baseline skills listed most frequently among the 23,122 postings included communication (34%), customer service (25%) and writing (22%).

Exhibit 13: Baseline Skills in Greatest Demand



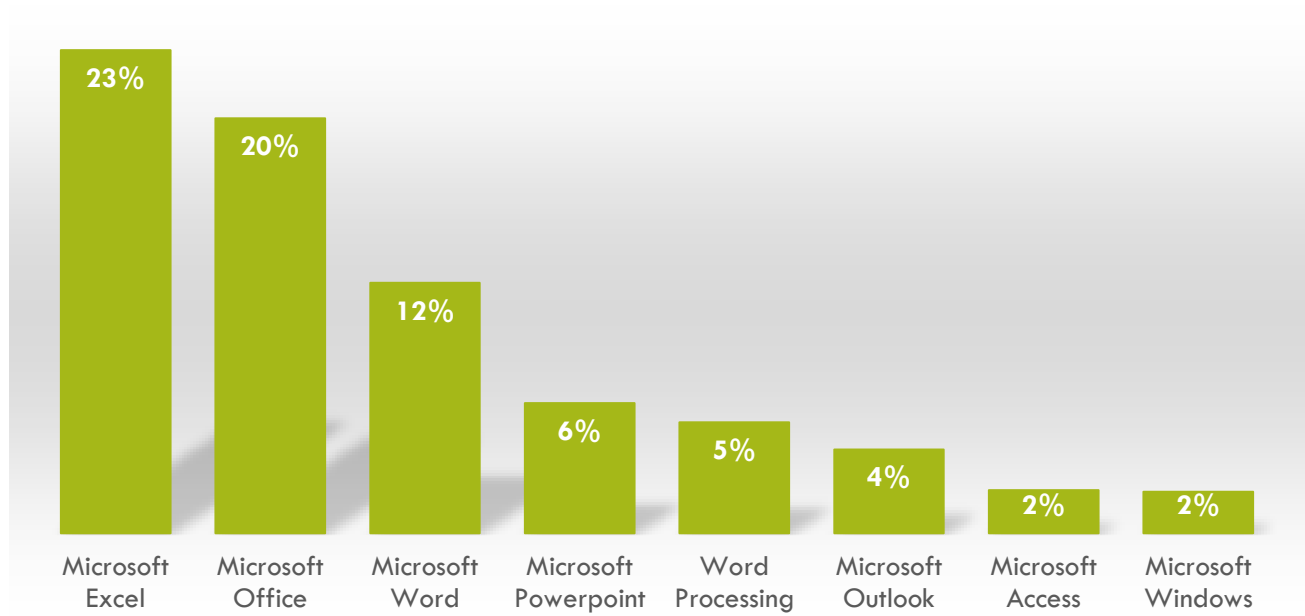
Specialized Skills: The specialized listed most frequently among the 23,122 postings were for customer service (25%), followed by sales (17%), and scheduling (16%).

Exhibit 14: Specialty Skills in Greatest Demand



There were a total of 12,746 software specifications noted among the 23,122 postings. Of these 12,746 specifications, 75% 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/>

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).