



Placer County Labor Market Conditions and Workforce Opportunity Profile

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CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

Partners



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EXECUTIVE SUMMARY



Placer County stands out in the Greater Sacramento region and the state for its remarkable industry and workforce assets. The Center of Excellence for the Greater Sacramento region identified key areas in which workforce and economic development stakeholders can continue to support workers and businesses in Placer County. The analysis resulted in the following findings and recommendations:

Placer County had remarkable growth between 2010 and 2019, and labor market data indicate that the economy has entered a recovery phase.

Between 2010 and 2019, Placer County's job growth percent change (36.5%) was 17% higher than the Greater Sacramento region's job growth percent change (19.4%). Employment trends in the South Placer Valley and Foothills subregions generally mirrored those in the county. Jobs totals from 2020 also show that the South Placer/Valley subregion and the county had a similar drop in jobs, a reduction of 7% to 8% compared with 2010 levels.

During the pandemic, five sectors in Placer County were especially hard hit by job losses. Interventions are needed to reverse long-term losses in the manufacturing sector.

Accommodation and Food Services, Wholesale Trade, Educational Services, Retail Trade, and Manufacturing saw the largest declines in jobs numbers during the pandemic in Placer County. Manufacturing and wholesale trade job losses in Placer County were larger than those in the region. Long-term job losses in the manufacturing sector, especially in the Foothills subregion, are concerning and require technical and workforce support interventions.

The Foothills subregion demonstrated strong growth, earnings, and resiliency during the pandemic. The East Placer/Tahoe subregion experienced challenges related to an aging population and lack of economic diversification.

The Foothills subregion had growth rates on par with the county's growth rates, and it exhibited comparative resilience in terms of job losses between 2019 and 2020. During the same period, the East Placer/Tahoe subregion, which is dominated by the construction sector and hospitality and food services, had the highest rate of job losses and markedly lower annual earnings per job. Regional support and funding for several organizations and initiatives in the Tahoe and Sierra region would promote a more diverse economy with higher earnings—an economy that can attract and retain working-age residents for both the Foothills subregion and the East Placer/Tahoe subregion.

The pandemic had the largest impacts on women, certain minority groups, and the youngest and oldest workers.

The data on weekly initial unemployment claims by race in Placer County show the most significant increases in the shares of claims from Asians and African Americans, women, and workers in the age categories 20–24 and 65–85. Though many of these workers are now employed, the report recommends tailored services to support workforce reentry and career transitions to stable and high-road employment.

Sierra College and other workforce intermediaries are well positioned to establish workforce pipelines for and pathways to high road, in-demand jobs with strengthened planning systems for local and regional workforce and economic development stakeholders.

Five-year occupational-demand projections in Placer County show hundreds of annual openings across several sectors. Throughout 2021, jobs postings volumes in Placer County were 50% to 80% higher than at the beginning of 2019; the data indicate significant, generalized difficulty in recruiting and hiring employees. Sierra College annually awards nearly 2,200 certificates and degrees in nearly 100 career-education program categories that align with key industries and occupations and is well positioned to fulfill many employers' workforce needs. Local and regional workforce and economic development stakeholders should continue to strengthen regional workforce systems to identify high-road opportunities and to meet industry workforce needs.

INTRODUCTION



Placer County is one of four counties in the Sacramento metropolitan area and is adjacent to the Reno–Sparks metropolitan area. Natural and recreation amenities in the county’s lakes, rivers, and mountains provide a high quality of life and draw visitors from around California and the world.

The state’s Gold Rush is a foundational part of the county’s heritage, and numerous historic sites exist in and around Auburn and Colfax in the Foothills subregion. The northeastern portion of Lake Tahoe, including Tahoe City and King’s Beach, is within the county’s boundaries in the East Placer/Tahoe subregion. The cities of Rocklin and Roseville anchor the South Placer/Valley subregion, which is the county’s population and jobs center.

Placer County possesses many economic development and workforce development assets to support businesses and workers. The Placer County Office of Economic Development coordinates the development efforts of elected officials, public agencies, and industry and business representatives. The Golden Sierra Workforce Development Board covers Placer County, El Dorado County, and Alpine County with workforce and business services. Numerous chambers of commerce, destination marketing organizations, and business and conservation organizations support efforts to support business and workforce activities throughout the county and the wider Tahoe basin, Sierra region, and Greater Sacramento region.

The pandemic brought economic impacts to the nation, state, region, and county. Placer County had exceptional growth between 2010 and 2019, but its industry sectors were subject to closures. Though hospitality and tourism industries were hit hardest, many industries suffered layoffs. Many of these industries recovered rapidly as they adapted and restrictions loosened. Nevertheless, many industries still have not reached pre-pandemic jobs numbers, and businesses continue to face hiring challenges. Pandemic-induced impacts increase structural workforce and economic development demands for a thriving economy.

Three Placer County workforce and economic development partners—the Placer County Office of Economic Development, the Golden Sierra Workforce Development Board, and Sierra College—sought to add to research on the long-term conditions and near-term impacts that have shaped Placer County’s workforce and economy. These organizations asked the Center of Excellence for the Greater Sacramento region to conduct research on the recent impacts of the pandemic and on overall economic and workforce opportunities. The research findings and recommendations for planning and supportive actions are presented in this report.



METHODOLOGY



The analysis divides Placer County into three subregions using data that is disaggregated by zip code. (Earlier research conducted by Beacon Economics used geocoded business data for subregional analysis.) Roseville and Rocklin are located in the South Placer/Valley subregion. The Foothills subregion is home to Auburn and Colfax in the Gold Country. The East Placer/Tahoe subregion extends to the northwest portion of Lake Tahoe. These subregions are compared to Placer County and the Greater Sacramento region, which includes El Dorado, Nevada, Placer, Sacramento, Sutter, Yolo, and Yuba counties. The appendix provides a list of zip codes by subregion.

To investigate the performance of the regional economy and labor markets, the analysis presented in this report incorporates population and demographics, labor force and unemployment data, industry sector analysis, occupational analysis, and an overview of workforce education and training programs. It takes a near-term approach through a data analysis of weekly, monthly, and quarterly impacts from the pandemic and a long-term approach through an examination of annual trends that provide baseline and historic performance measures.

Population and demographics

The research analyzed population and demographic data using one-year estimates from the U.S. Census Bureau's American Community Survey (ACS), which provides statistics on population, race, ethnicity, and age. The baseline year is 2011. The most recent available data is for 2019.

Labor force and unemployment

Labor force, unemployment, and weekly initial unemployment claims data come from the California Employment Development Department's Labor Market Information Division (LMID). Weekly, monthly, and annual data are included in the report. Zip code analysis for subregions uses annual data through 2020. Weekly unemployment claims data contain demographic information.

Industry sectors

This report follows Beacon Economics' analysis of 11 two-digit NAICS codes, referred to as priority sectors. The report's industry and earnings analysis uses Emsi data. The report compares the composition of industry sectors in the subregions, county, and region. The analysis uses a 10-year performance period, 2010 to 2020, and it compares annual earnings per job. Monthly industry analysis shows impacts from the pandemic. The analysis uses Current Employment Statistics (CES) data from LMID.

Jobs postings

Jobs postings are an indicator of demand. The analysis compares quarterly jobs postings volumes using data from Burning Glass, Labor Insight. It shows jobs postings volumes by industry as well as top employers and jobs titles for each subregion. Analysis of jobs postings in subregions used a town and city keyword definition (see the appendix).

Occupations and wages

Data from Emsi was used to develop a skill-level profile of occupations by education and experience level. The profile displays the number of jobs for 2020 and the number of annual openings projected over five years. A pathway diagram depicts major categories of occupations according to typical education and experience requirements.

Education and training programs

Web searches were used to compile a qualitative inventory of educational and training programs at Sierra College. The California Community Colleges Chancellor's Office Management and Information Systems (MIS) Data Mart was the source of quantitative data on Sierra College awards. The analysis aggregates education and training programs according to categories similar to occupation groups to compare labor market demand to education and training program availability.

POPULATION AND DEMOGRAPHICS



Between 2011 and 2019, the population of Placer County increased 4% faster than that of the Greater Sacramento region. Most of the county's growth came from the South Placer/Valley subregion, the population of which increased by nearly 15%. The population of the Foothills subregion increased by nearly 6%. The East Placer/Tahoe subregion's population experienced virtually no growth between 2011 and 2015, and it decreased by 14% in the next four years.

Exhibit 1. Population, Placer County, subregions, and Greater Sacramento (North) region, 2011–2019

Geography	2011	2015	2019	% Change 2011–2019	% Change 2015–2019
South Placer Valley	261,811	281,622	300,420	14.7%	6.7%
Foothills	74,569	76,266	78,862	5.8%	3.4%
East Placer/Tahoe	10,230	10,290	8,813	-13.9%	-14.4%
Placer County	343,554	366,280	385,512	12.2%	5.3%
Greater Sacramento	2,442,344	2,544,026	2,639,124	8.1%	3.7%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Between 2011 and 2019, Placer County and the Greater Sacramento region slightly increased their shares of African Americans, Asians, and Latinos. Both the county and the region are majority White, but Placer County's share of white population (82%) is 16% higher than the region's share (66%). Asians comprised the largest minority share of Placer County's population at 7%. That figure is lower than the region's share of Asians (13%).

In Placer County, 14% of the population identified as Latino. In the Sacramento region, the figure was 22%.

Exhibit 2. Placer County, race and ethnicity, 2011 and 2019

	2011		2019	
White	290,923	85%	316,716	82%
Black or African American	4,587	1%	6,626	2%
American Indian and Alaska Native	2,654	1%	2,052	1%
Asian	20,515	6%	28,909	7%
Native Hawaiian and Other Pacific Islander	750	0%	858	0%
Some other race	11,478	3%	11,358	3%
Two or more races	12,647	4%	18,993	5%
Total Population	343,554	100%	385,512	100%
Hispanic or Latino (of any race)	43,268	13%	53,969	14%
Neither Hispanic nor Latino	300,286	87%	331,543	86%
Total Population	343,554	100%	385,512	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Exhibit 3. Greater Sacramento (North) region, race and ethnicity, 2011 and 2019

	2011		2019	
White	1,656,565	68%	1,735,492	66%
Black or African American	160,131	7%	169,227	6%
American Indian and Alaska Native	25,407	1%	19,873	1%
Asian	281,100	12%	347,346	13%
Native Hawaiian and Other Pacific Islander	16,274	1%	22,222	1%
Some other race	161,571	7%	165,268	6%
Two or more races	141,296	6%	179,696	7%
Total Population	2,442,344	100%	2,639,124	100%
Hispanic or Latino (of any race)	502,482	21%	583,477	22%
Neither Hispanic nor Latino	1,939,862	79%	2,055,647	78%
Total Population	2,442,344	100%	2,639,124	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

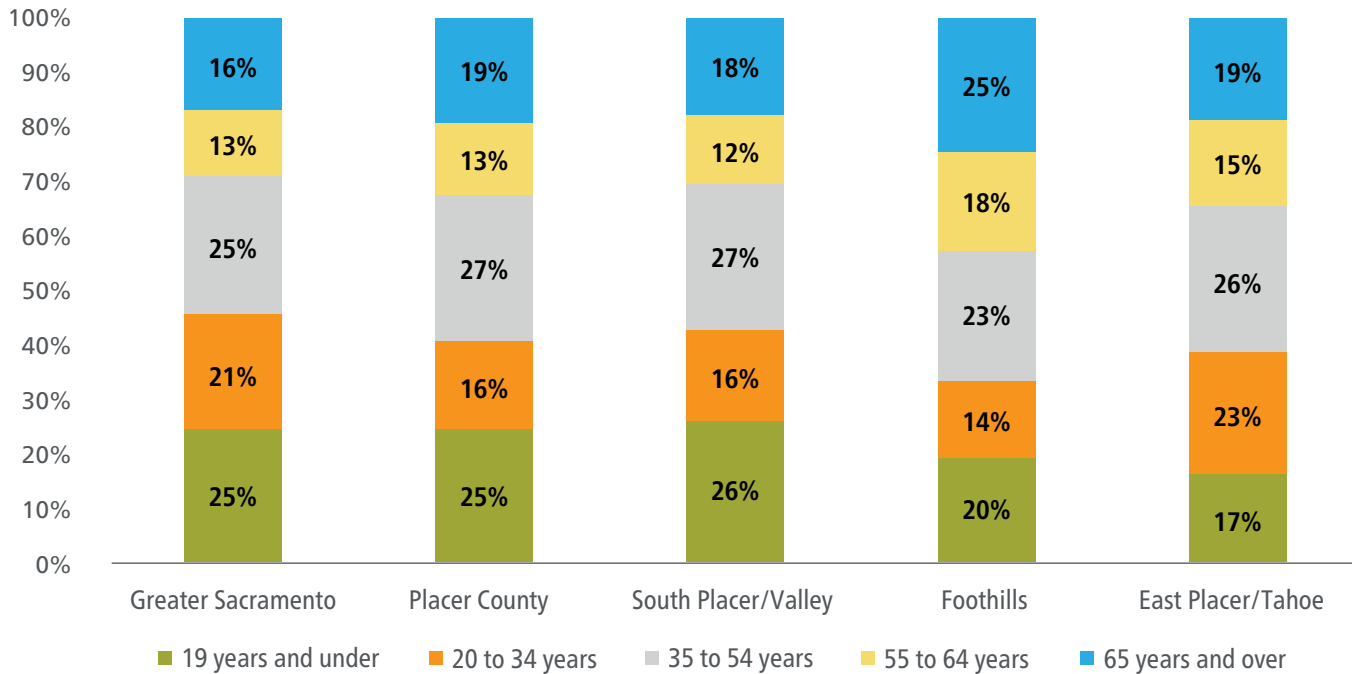
An analysis of the subregions’ race and ethnicity demographics revealed the subregions’ race and ethnicity profile is not markedly different than the county’s profile. The main difference is the share of Asians in the South Placer County/Valley subregion, where Asians make up 7% of the population. In the Foothills region, the figure is 2%. In the East Placer/Tahoe subregion, the figure is 1%.

The population of Placer County is slightly older than that of the Greater Sacramento region. Exhibit 4 shows that the county’s share of population 65 and over (19%) is 3% higher than the region’s share (16%). The difference owes to the Foothills subregion, where 43% of the population is over age 54, compared with 32% in the county and 29% in the region. The Foothills subregion has the smallest shares of population under age 34.

The East Placer/Tahoe subregion’s share of population 20–54 years is similar to the region’s share. It is nearly half (48%) of the subregion’s population, compared with 43% of the Placer County population. (See notes on the East Placer/Tahoe subregion’s aging trend below.)



Exhibit 4. Age demographics, share of total, Placer County, subregions, and Greater Sacramento (North) region, 2019

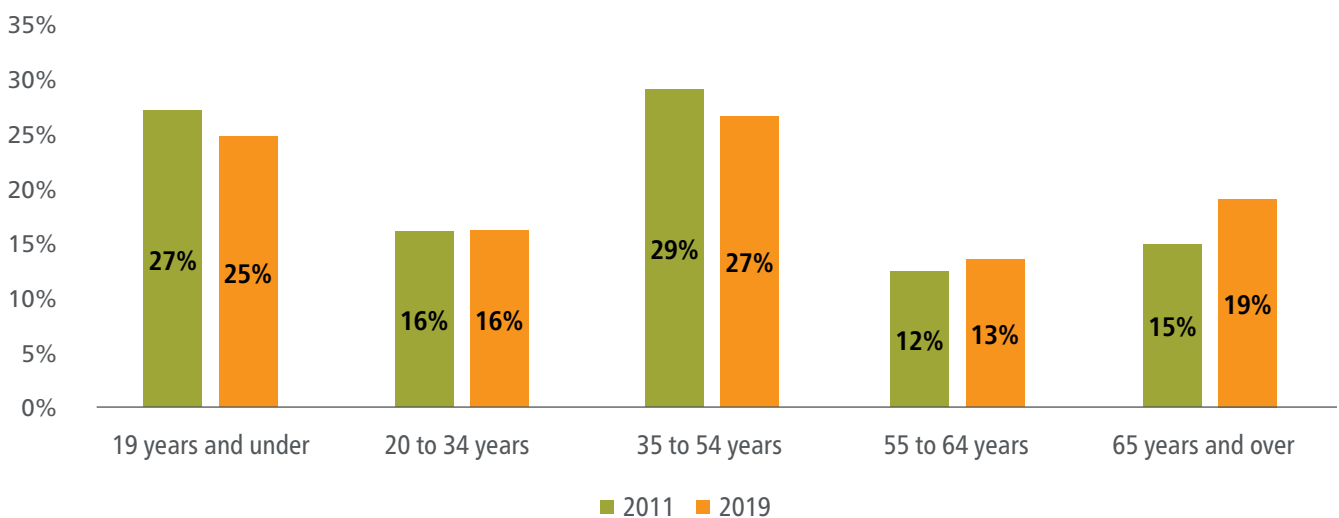


Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Between 2011 and 2019, the population of Placer County became older, with the number of people in the 55–64 category growing by 21% and in the 65-and-over category, by 42% (Exhibit 5). (These increases were only slightly more than those in the region.) The slowest population growth in the county (and the region) was in the 54-and-under categories.

The 65-and-over population grew in all subregions, but it grew the most in the East Placer/Tahoe subregion at 58%. In that subregion, the 54-and-under population decreased by 26%.

Exhibit 5. Age demographics, share of total, Placer County, 2011–2019



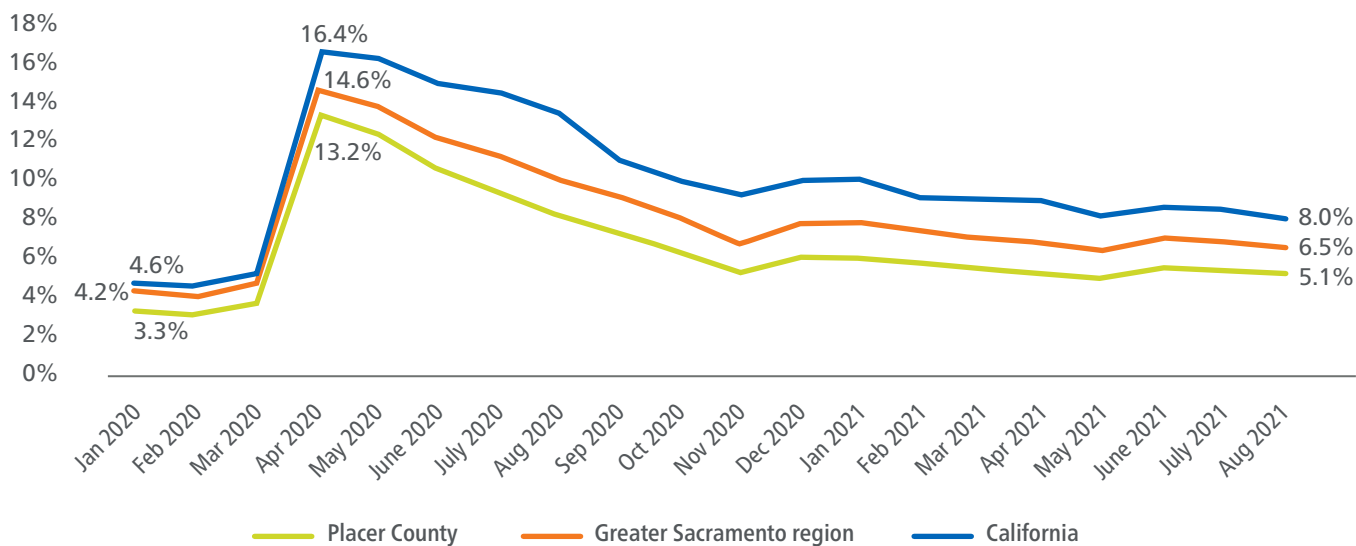
Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

UNEMPLOYMENT AND LABOR FORCE



Placer County has consistently had an unemployment rate lower than that of the region and the state (Exhibit 6). During 2021, the county consistently had unemployment rates 3% to 4% lower than those of the state and 1% to 2% lower than those of the Greater Sacramento region. Unemployment rates steadily declined during the pandemic in all three geographies. All the geographies experienced temporary pandemic-related setbacks in the last months of 2020 and in June 2021.

Exhibit 6. Monthly unemployment rates, Placer County, Greater Sacramento (North) region, and California, January 2020—August 2021



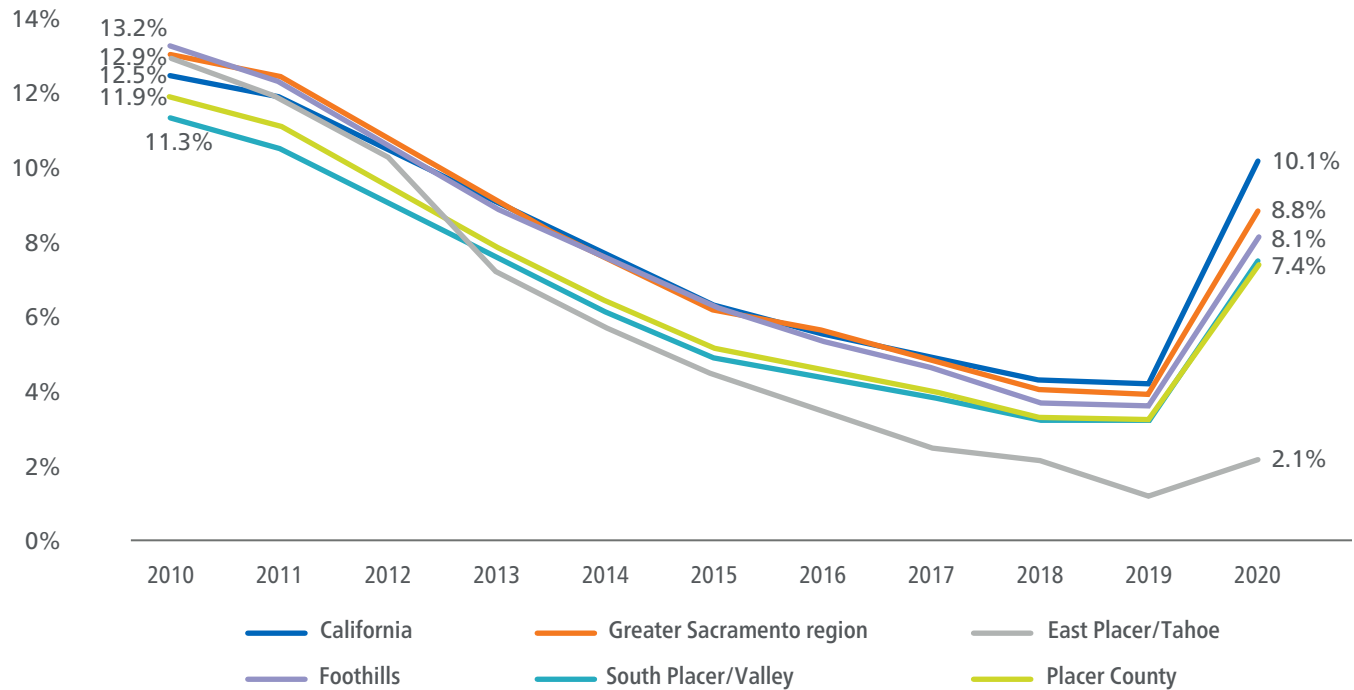
Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.



Exhibit 7 shows the steady decline of average annual unemployment rates in the state, region, county, and county subregions after the Great Recession. The pandemic caused unemployment rates—at historic lows—to more than double in most cases.

Since 2013, all three sub-regions of Placer County consistently have had lower average annual unemployment rates than the Greater Sacramento region and the state. The South Placer/Valley subregion’s unemployment rate tracks with Placer County’s unemployment rate. The average unemployment rate for both the subregion and the county was 7.4% in 2020. The Foothills subregion’s rate is slightly higher than the county’s rate, but it is still lower than the unemployment rate of the region and the state. The Foothills subregion’s rate was 8.1% in 2020. Since 2012, the East Placer/Tahoe subregion’s unemployment rates have been significantly lower than the unemployment rates of the county, region, and state. The East Placer/Tahoe subregion’s rate was 2.1% in 2020.

Exhibit 7. Average annual unemployment rates, subregions, Placer County, Greater Sacramento (North) region, and California, 2010–2020

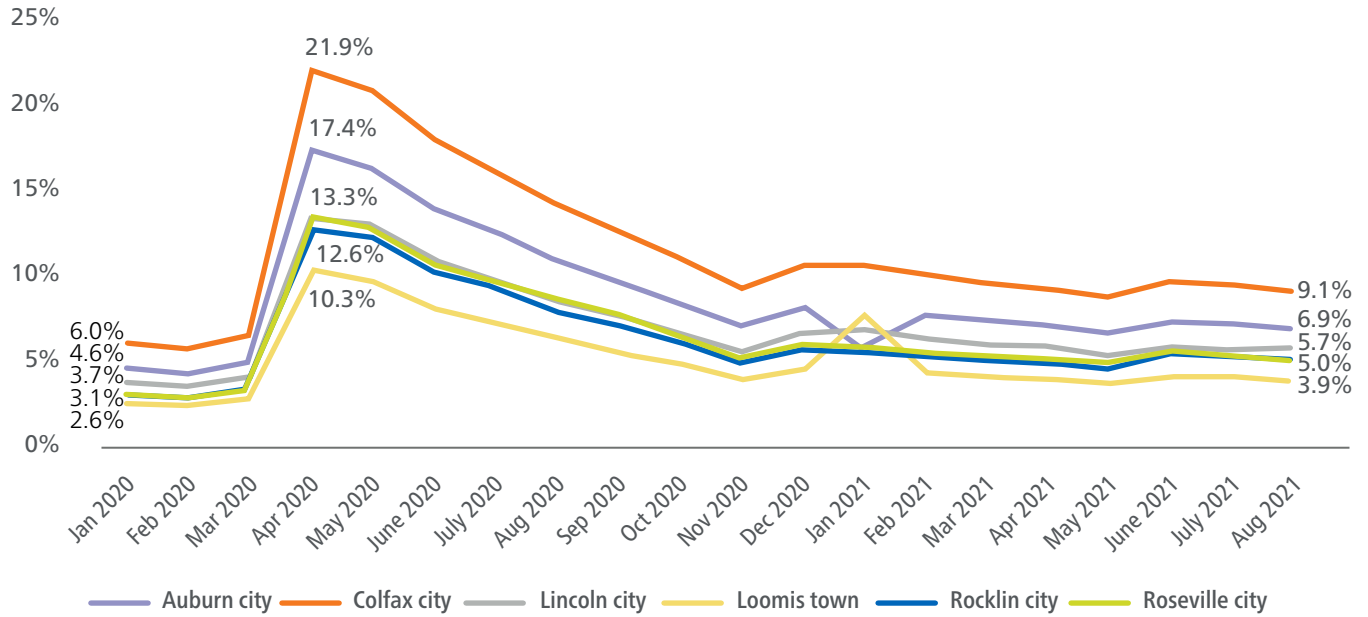


Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

Note: The unemployment rate labels are entered only once when the rate was virtually the same in two geographies.

Unemployment rates in the cities and towns of Placer County indicate different impacts from the pandemic (Exhibit 8). At the onset of the pandemic, in April 2020, the unemployment rate in Colfax (21.9%) was nearly double the county’s unemployment rate (13.2%). Auburn’s unemployment rate was 4% higher than the county’s rate in the same month. The unemployment rates of Roseville, Rocklin, and Lincoln tracked with the county’s unemployment rate throughout the pandemic. In August 2021, Roseville, Rocklin, and Lincoln all had unemployment rates under 6%. Loomis consistently had the lowest unemployment rate of the Placer County towns included in the analysis.

Exhibit 8. Monthly unemployment rates, selected towns and cities of Placer County, January 2020—August 2021

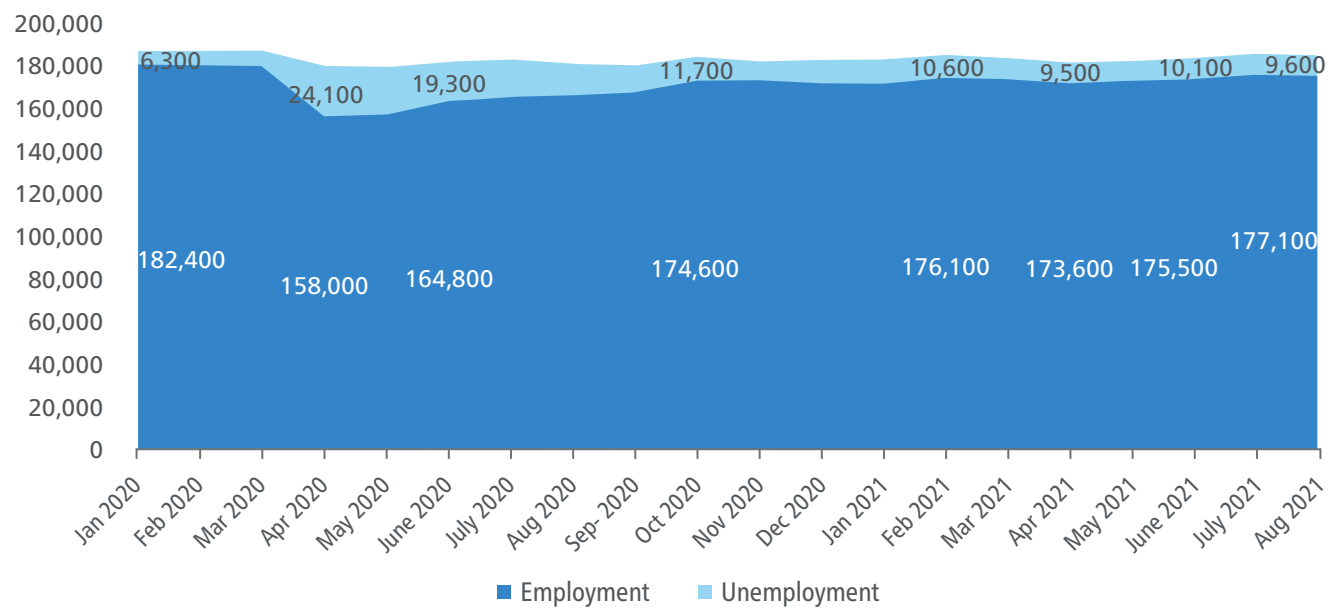


Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

Note: The unemployment rate labels are entered only once when the rate was virtually the same in two geographies.

Exhibit 9 displays the total employment and unemployment (labor force) for Placer County between January 2020 and August 2021. Between March and April 2020, the number of unemployed workers in the county more than tripled from 6,300 to 24,100. The number of unemployed workers declined over the next 16 months to 9,600 in August 2021.

Exhibit 9. Employed and unemployed workers in Placer County, January 2020—August 2021



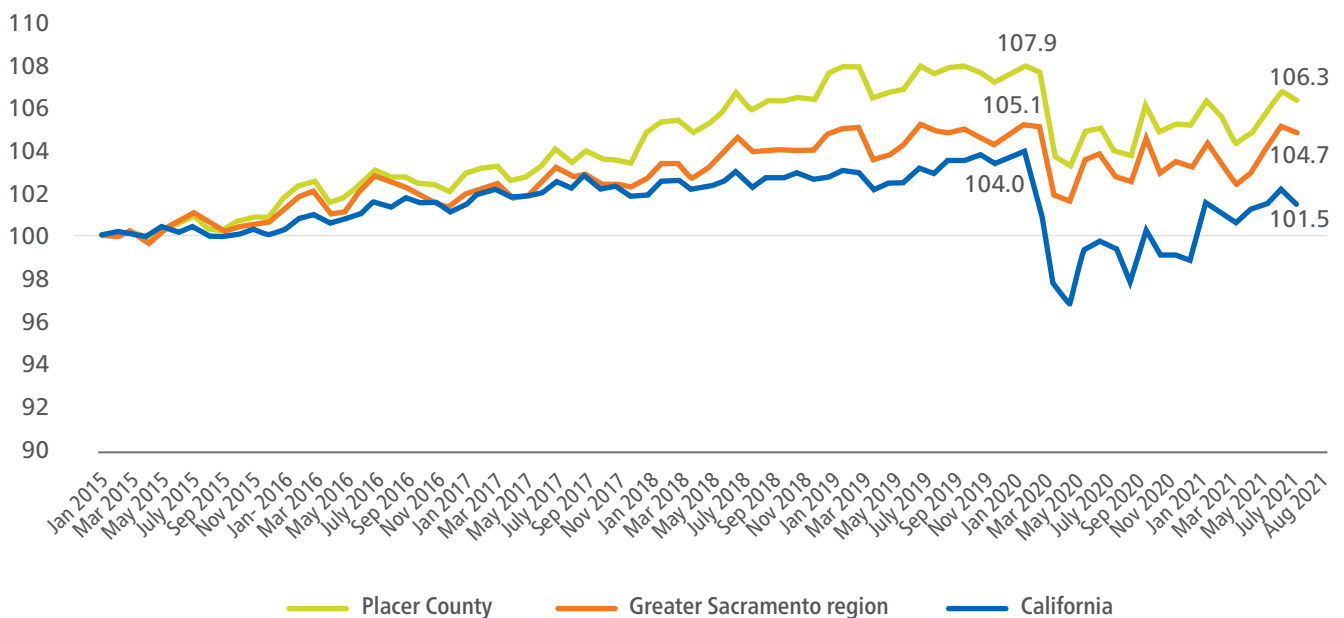
Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

Exhibit 10 shows monthly labor force totals indexed to January 2015. The county’s labor force growth somewhat shielded the county from the impact of the pandemic. Between January 2015 and February 2021, the labor force in the county increased 7.9% (189,500 workers in February 2021) compared with 5.1% in the Greater Sacramento region and 4.0% in the state.

Labor force data indicate that Placer County experienced a slightly larger labor force impact from the pandemic than the Greater Sacramento region. Between February and April 2020, the county lost 3.9% of its labor force, while the region lost 3.1% of its labor force. The two-month decline in the county and region was less than that of the state, which lost 5.9% of its labor force.

Placer County’s labor force recovery during the last half of 2020 through August 2021 mirrored the region’s recovery. In August 2021, the labor force rate of Placer County was still about 1.5% lower than pre-pandemic levels. The region recovered slightly better, with a labor force rate down 0.4% from pre-pandemic levels. The state recovered faster than the county and the region, but its lost share of labor force was double that of the county and the region.

Exhibit 10. Civilian labor force, Placer County, Greater Sacramento (North) region, and California, monthly trend January 2015–August 2021, indexed to January 2015



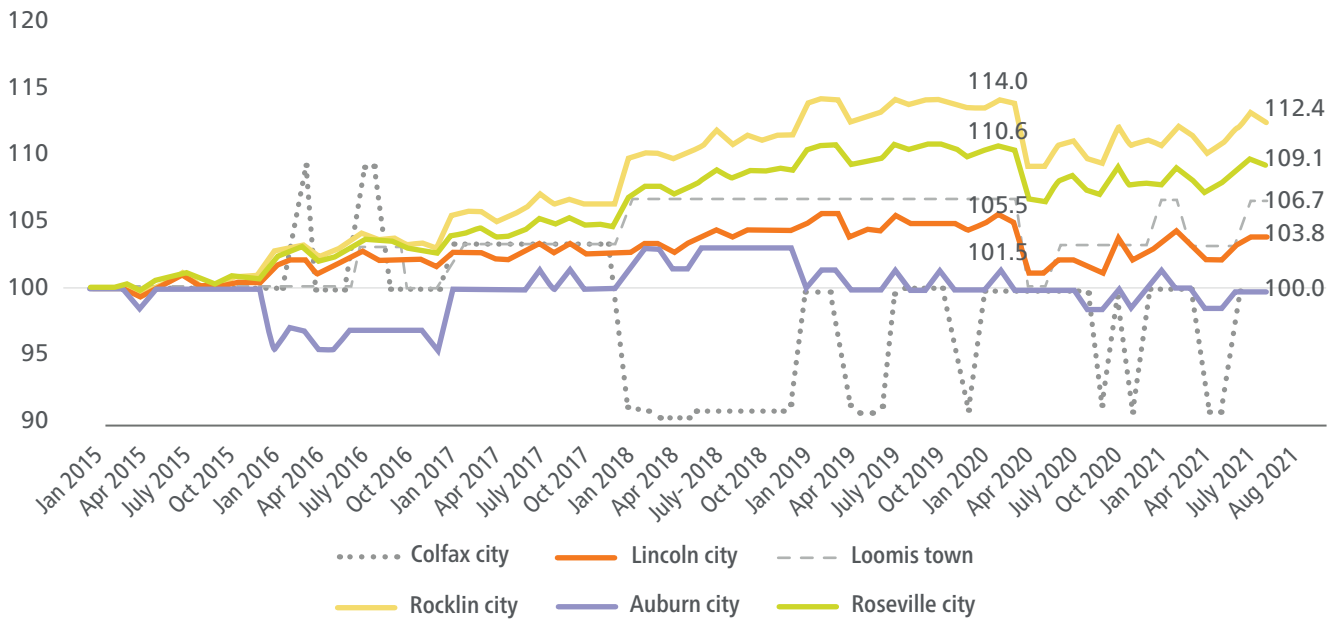
Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.



Analysis of labor force data in cities and towns in Placer County also reveals divergent trends. From January 2015 through February 2021, Rocklin’s labor force grew by 14.0%; Roseville’s, by 10.5%; Lincoln’s, by 5.5% and Auburn’s, by 1.5%. (A lack of data prevents analysis of labor force growth in Colfax and Loomis.)

Between February and April 2020, Auburn, Rocklin, and Roseville lost between 3.5% and 4.4% of their labor forces. Between May 2020 and August 2021, the cities regained between 2.5% and 3.0% of their labor forces. In August 2021, labor force totals in the cities were about 1.5% below pre-pandemic levels.

Exhibit 11. Civilian labor force, selected towns and cities of Placer County, monthly trend January 2015—August 2021, indexed to January 2015



Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

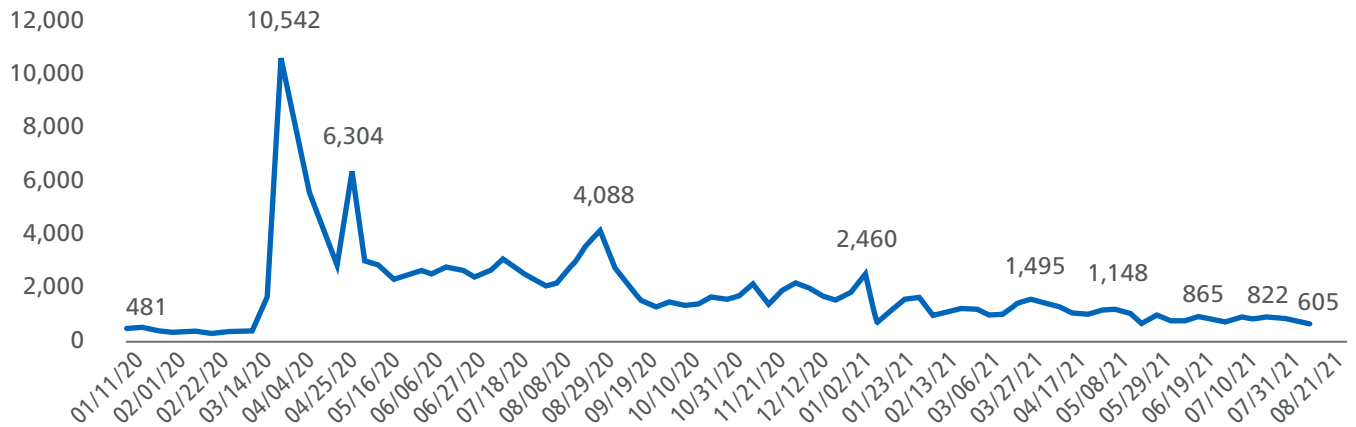


UNEMPLOYMENT CLAIMS



Weekly initial unemployment claims in Placer County spiked in mid-March 2020, and they remained above pre-pandemic levels well into 2021 due to business closures and other factors related to the pandemic. The number of claims generally declined in fall 2020 and throughout 2021. By late summer 2021, weekly unemployment claim numbers were approaching pre-pandemic levels (Exhibit 12).

Exhibit 12. Weekly unemployment initial claims, Placer County, January 2020—August 2021

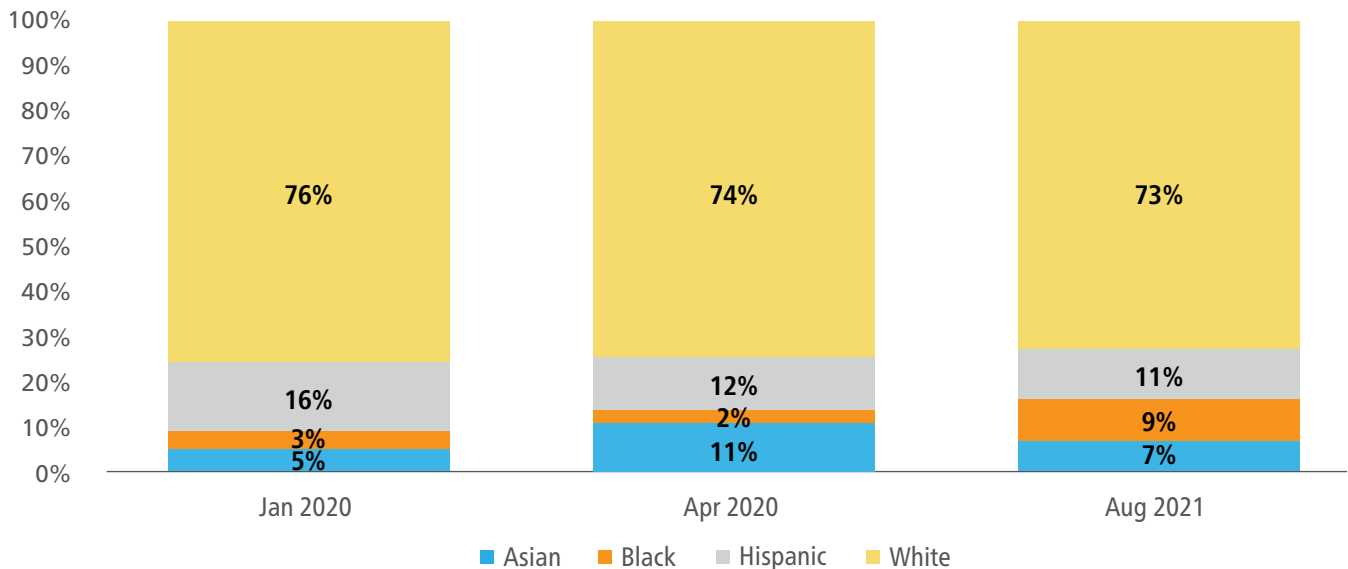


Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.



The vast majority of unemployment claimants in Placer County are White because the majority of the population is White. Yet the data indicate that job losses disproportionately impacted people of color in Placer County as elsewhere (Exhibit 13). At the beginning of pandemic, when initial claims rose into the thousands, the data show that the share and number of Asian claimants doubled from 5% to 11% of claimants. (According to the 2019 U.S. Census, the county population is estimated to be 7% Asian.) In August 2021, the data indicate 9% of claimants were Black. (According to the U.S. 2019 Census, the county population is estimated to be 2% Black.) The share of Hispanics filing initial unemployment claims declined during the pandemic. The share of Hispanic claimants was equivalent to the 2019 U.S. Census estimate of the share of Hispanics in Placer County (14%).

Exhibit 13. Selected weekly initial unemployment claims by race and ethnicity, Placer County, January 2020, April 2020, and August 2021



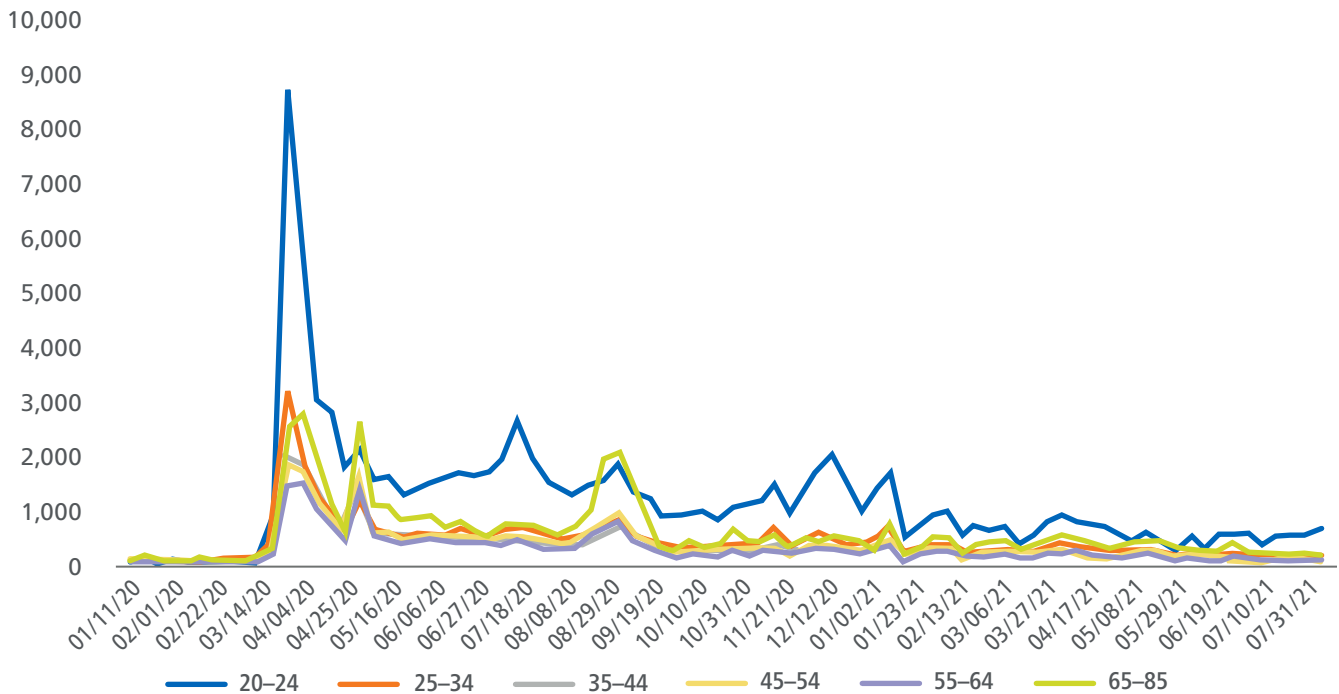
Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

The vast majority of weekly initial unemployment claims are filed by workers age 25–64. However, the number of initial claims filed after March 2020 compared with the number filed before March 2020 grew the most for workers age 20–24 and age 65–85. Exhibit 14 displays the weekly percent difference in weekly claims indexed to January 2020 for all age groups.

In early 2020, weekly unemployment claims from workers age 20–24 and age 65–85 generally numbered less than 30. That number jumped to more than 1,000 in the first two weeks of the pandemic closures in March. Initial claims numbers remained in the hundreds for both groups for the rest of 2020.



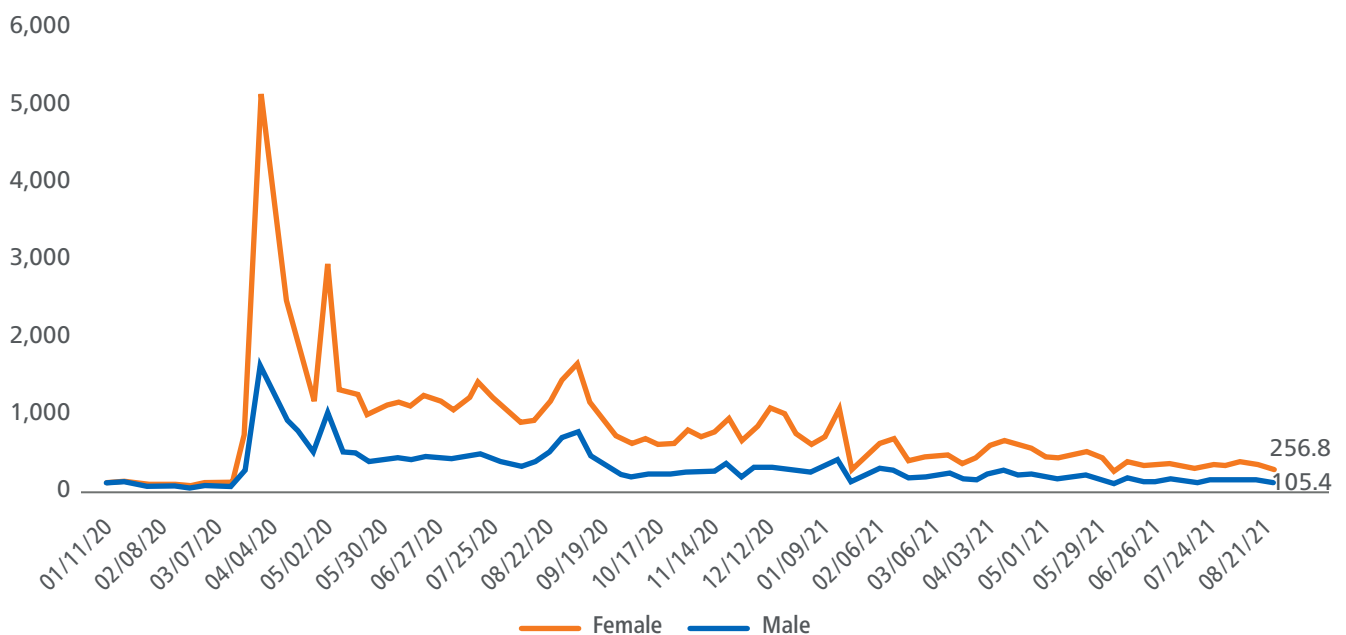
Exhibit 14. Weekly initial unemployment claims by age group, Placer County, January 2020—August 2021, indexed to January 2020



Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

In the months leading into the pandemic, women generally made up about a third of weekly initial unemployment claimants in Placer County. With the onset of the pandemic, women comprised a majority share—55% to 60%—of claimants on a weekly basis throughout the rest of 2020 and 2021. Exhibit 15 shows weekly initial unemployment claims indexed to January 2020 by gender. In the early months of 2020, the weekly number of women filing for unemployment was roughly 100–150. That number shot up to 1,000–6,000 for the remainder of 2020. It dropped significantly during 2021, but the share of women’s claims remained higher than 50% of all claims.

Exhibit 15. Weekly initial unemployment claims by gender, Placer County, January 2020—August 2021, indexed to January 2020



Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.

INDUSTRY COMPOSITION AND TRENDS



Exhibit 16 provides an overview of Placer County employment by subregion and region. South Placer Valley, which includes the job centers of Roseville and Rocklin, has the county’s largest share of jobs. Consequently, it has a significant impact on the county’s overall job growth percentage and average earnings per job.

Over the past 10 years, Placer County has grown faster than the Greater Sacramento region, largely due to employment growth in the South Placer/Valley and Foothills subregions. The East Placer/Tahoe subregion exhibited growth similar to that for the region until 2020, when employment sharply declined.

Average annual earnings in Placer County, the South Placer/Valley subregion, and the Foothills subregion are equivalent to those in the Greater Sacramento region. Annual earnings in these geographies are between \$75,000 and \$79,000. In the East Placer/Tahoe subregion, average annual earnings are \$56,300, approximately \$20,000 lower than those in the other geographies.

Exhibit 16. Regional employment and annual earnings, all industries, Placer County, subregions, and Greater Sacramento (North) region, 2010–2020

Region and Subregion	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
South Placer/Valley	111,509	144,333	29.4%	\$75,442
Foothills	24,647	31,893	29.4%	\$79,667
East Placer/Tahoe	8,339	9,007	8.0%	\$56,295
Placer County	145,625	186,466	28.0%	\$75,204
Greater Sacramento	1,047,612	1,200,558	14.6%	\$79,138

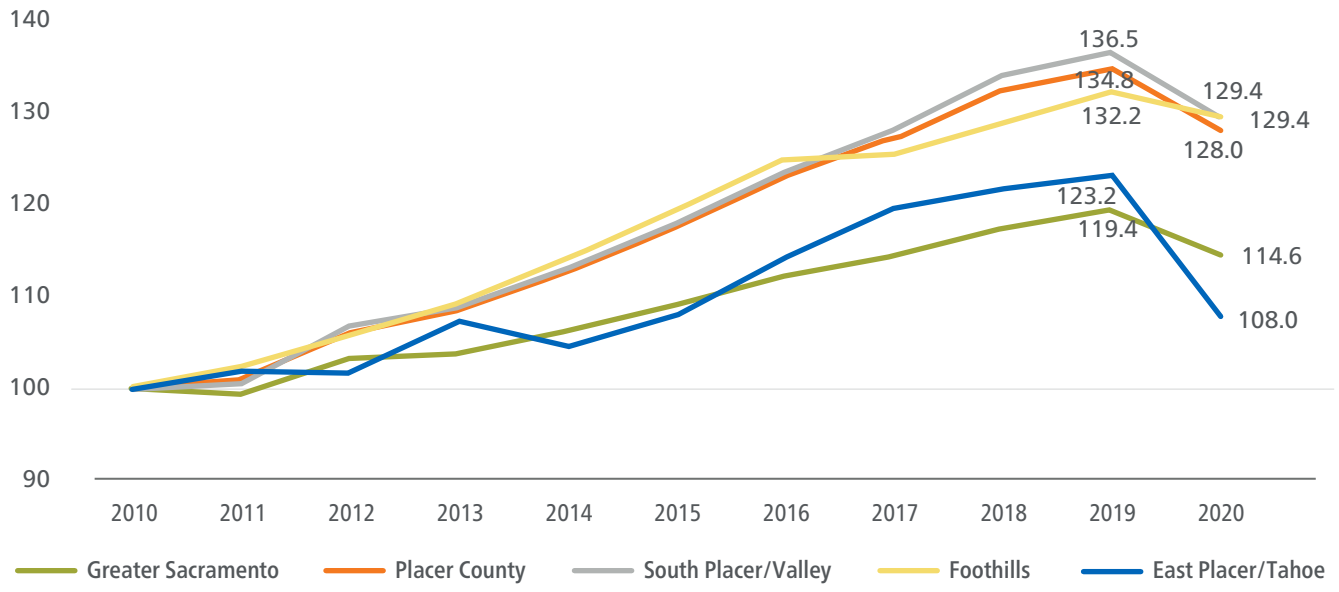
Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Between 2010 and 2019, Placer County’s job growth percent change (36.5%) was 13% higher than the Greater Sacramento region’s job growth percent change (23.2%) (Exhibit 17). Employment trends in the South Placer/Valley and Foothills subregions generally mirrored those in the county. Jobs totals from 2020 also show that the South Placer/Valley subregion and the county had a similar drop in jobs, a reduction of 7% to 8% compared with 2010 levels.

The Foothills subregion lost 4.2% of its jobs in 2020 compared with 2010 levels, indicating some level of employment resiliency.

The East Placer/Tahoe subregion’s job growth was slightly better than the region’s job growth, but the subregion was hit harder by the pandemic than the region in 2020. The subregion lost nearly 15% of its jobs in 2020 compared with 2010 levels.

Exhibit 17. Employment trends, all industries, Placer County, subregions, and Greater Sacramento (North) region, 2010–2020, indexed to 2010



Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

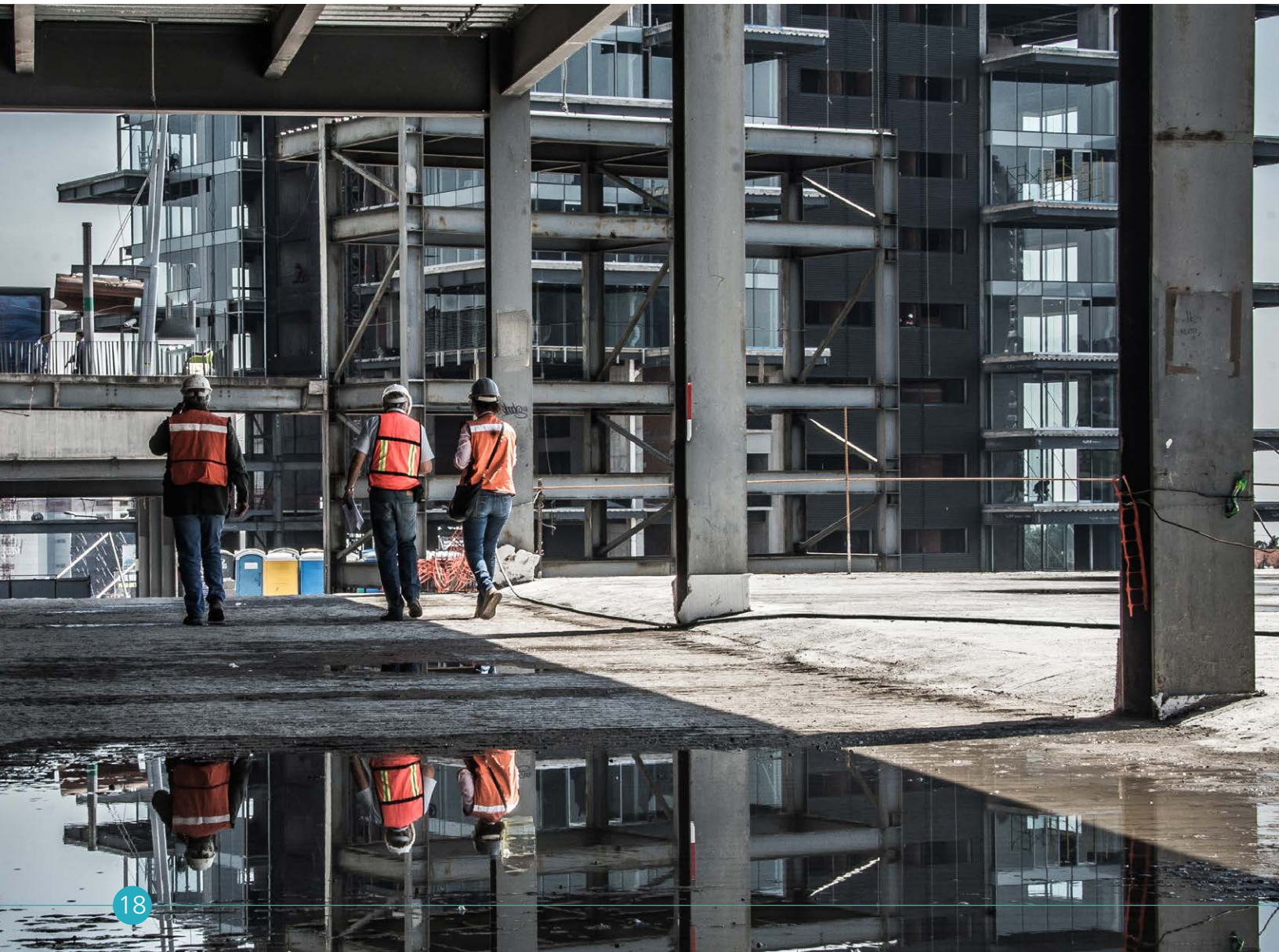


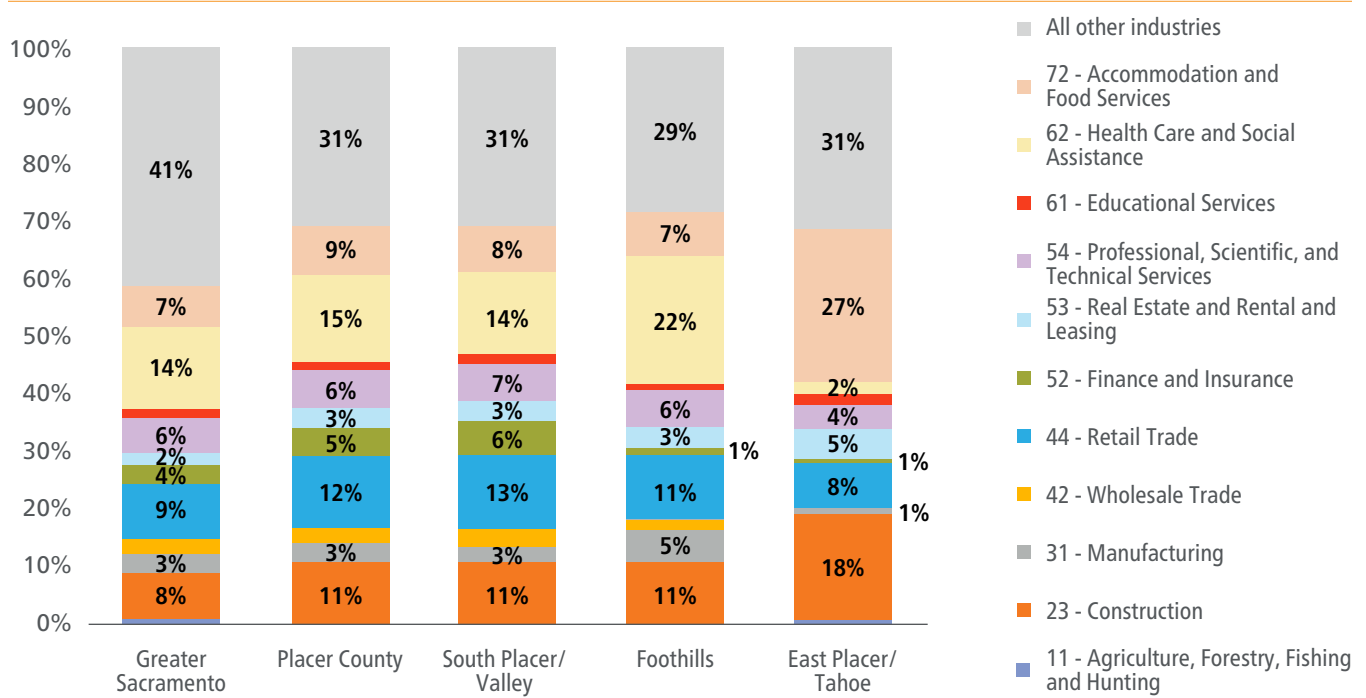
Exhibit 18 displays the share of total jobs in key industry sectors for Placer County and its subregions and the Greater Sacramento region. The analysis focuses on 11 sectors identified in previous research.

The industry composition of the South Placer/Valley and Foothills subregions is similar to that of Placer County and the Greater Sacramento region. The large share of “all other” industries in the Greater Sacramento region owes to the region’s higher share of government jobs (22% of total jobs). Compared with the Greater Sacramento region, Placer County and its subregions have slightly higher shares for Retail Trade (12% of total jobs) and Finance and Insurance (5% of total jobs).

Notably, the Foothills subregion has a much higher share of jobs in Health Care and Social Assistance (22% of total jobs) than the county (15% of total jobs) and the region (14% of total jobs). The subregion also has a larger share of jobs in Manufacturing (5% of total jobs) than other Placer County subregions (3% of total jobs) and the Greater Sacramento region (3% of total jobs).

The East Placer/Tahoe subregion is notable for having large shares of jobs in Accommodation and Food Services (27% of total jobs), Real Estate and Rental and Leasing (5% of total jobs), and Construction (18% of total jobs). In addition, the subregion has a slightly higher share of government jobs than the county.

Exhibit 18. Industry sector employment shares of total, Placer County, subregions, and Greater Sacramento (North) region, 2020



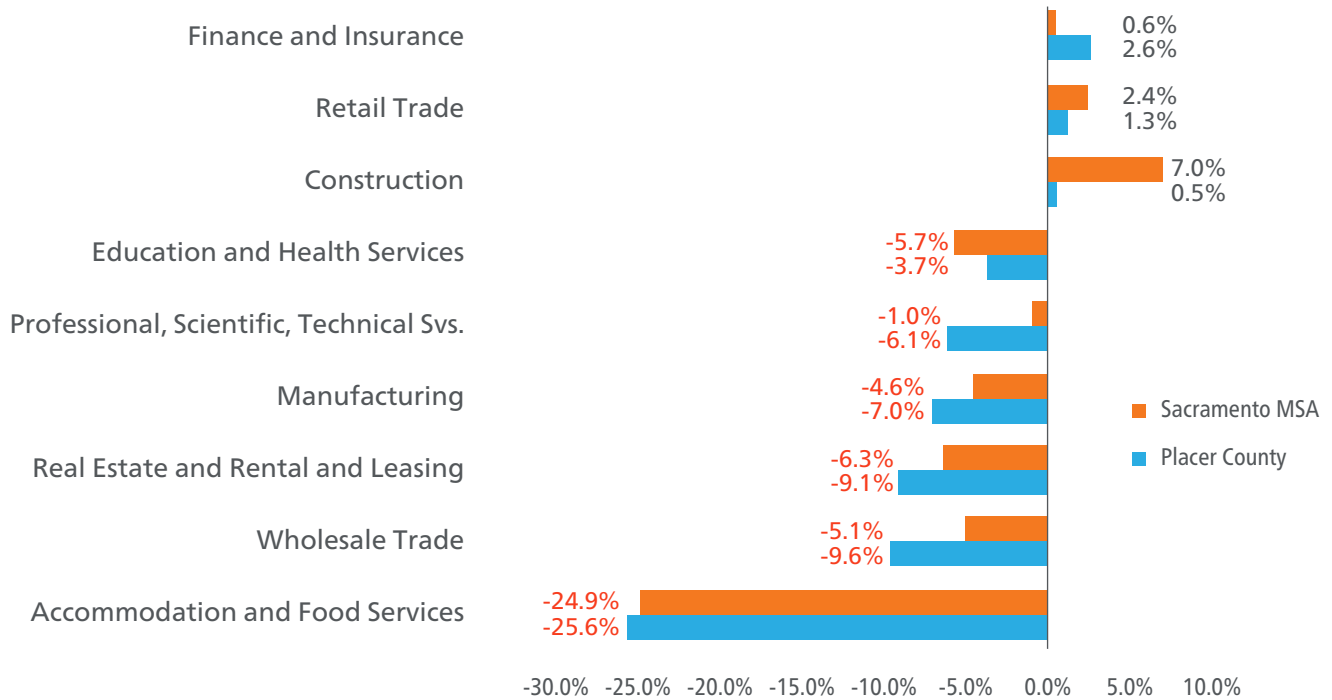
Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

The pandemic impacted more than just hospitality and tourism jobs. Exhibit 19 compares monthly job totals for Placer County and the Greater Sacramento region. The analysis shows that in 2020 the county experienced significant jobs losses in Educational and Health Services (-3.7%); Professional, Scientific, and Technical Services (-6.1%); Manufacturing (-7.0%); Real Estate and Rental and Leasing (-9.1%); and Wholesale Trade (-9.6%). Accommodation and Food Services experienced the largest setback, losing a quarter of its employment in the county and the region.

Placer County had larger job losses than the Sacramento region in several sectors. These sectors include Wholesale Trade (9.6% versus 5.1%); Real Estate and Rental and Leasing (9.1% versus 6.3%); Manufacturing (7.0% versus 4.6%); and Professional, Scientific, and Technical services (6.1% versus 1.0%).

Only three of the analyzed industries experienced a positive employment change, but the gains were less than historical trends: Finance and insurance (an increase of 2.6% in the county and 0.6% in the region), Retail Trade (an increase of 1.3% in the county and 2.4% in the region), and Construction (an increase of 0.5% in the county and 7.0% in the region).

Exhibit 19. Industry sector employment change, Placer County and Sacramento-Roseville-Arden-Arcade MSA, January 2020—December 2020



Source: Employment data—California Employment Development Department, Labor Market Information Division, Current Employment Statistics (CES), <https://www.labormarketinfo.edd.ca.gov/cgi/dataanalysis/areaselection.asp?tablename=ces>.

Exhibit 20 shows that the largest industry sector impacts were felt in the first months of the pandemic in Placer County. For example, Accommodation and Food Services lost nearly half of its employment between January and April 2020. By December 2020, the sector had recovered half of its lost jobs. Manufacturing lost 18% of its employment between January and April 2020. In December, jobs numbers in the sector were down 5.4% compared to January levels.

Exhibit 20. Industry sector employment change, Placer County, January 2020—December 2020

Industry	Jan 2020	Apr 2020	Dec 2020	Jan–April 20 % Change	Jan–Dec 20 % Change
Accommodation and Food Services	19,500	10,200	14,800	-47.7%	-24.1%
Construction	17,400	15,800	18,400	-9.2%	5.7%
Educational and Health Services	30,600	26,900	28,500	-12.1%	-6.9%
Finance and Insurance	7,700	7,700	7,900	0.0%	2.6%
Manufacturing	5,600	4,600	5,300	-17.9%	-5.4%
Professional, Scientific, and Technical Services	9,300	9,000	9,300	-3.2%	0.0%
Real Estate and Rental and Leasing	5,200	4,600	5,000	-11.5%	-3.8%
Retail Trade	23,300	18,400	23,100	-21.0%	-0.9%
Wholesale Trade	4,600	4,600	4,700	0.0%	2.2%

Source: Employment data—California Employment Development Department, Labor Market Information Division, Current Employment Statistics (CES), <https://www.labormarketinfo.edd.ca.gov/cgi/dataanalysis/areaselection.asp?tablename=ces>.

Exhibit 21 and Exhibit 22 present trend data for the 11 key industry sectors in Placer County and the Greater Sacramento region. Multiple industry sectors in the county and the region experienced remarkable growth rates between 2010 and 2020. Notably, Construction grew 74% in the county and 57% in the region, Health Care and Social Assistance grew 55% in the county and 59% in the region, and Educational Services grew 36% in the county and 24% in the region.

Two other sectors had substantial growth in Placer County between 2010 and 2020: Wholesale Trade (20%) and Professional, Scientific, and Technical Services (34%).

Manufacturing poses a clear concern for Placer County. The sector lost nearly 19% of its jobs between 2010 and 2020. By comparison, the sector grew 7% in the region.

Average annual earnings are generally equivalent in the county and the region. In several industry sectors, earnings are markedly higher in the county. These sectors include Finance and Insurance; (\$20,000 higher in the county); Real Estate and Rental and Leasing (\$15,400 higher in the county); Professional, Scientific, and Technical Services (\$15,400 higher in the county); and Health Care and Social Assistance (\$20,000 higher in the county).

Exhibit 21. Industry sector employment trends and average annual earnings, Placer County, 2010–2020

Industry Sector	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
11 - Agriculture, Forestry, Fishing & Hunting	480	552	15.0%	\$53,748
23 - Construction	11,936	20,788	74.2%	\$78,975
31 - Manufacturing	7,069	5,756	-18.6%	\$84,673
42 - Wholesale Trade	4,058	4,887	20.4%	\$87,180
44 - Retail Trade	20,353	23,055	13.3%	\$48,295
52 - Finance and Insurance	8,089	8,712	7.7%	\$141,464
53 - Real Estate and Rental and Leasing	3,941	6,452	63.7%	\$89,306
54 - Professional, Scientific, and Technical Services	8,853	11,850	33.9%	\$87,083
61 - Educational Services	2,176	2,966	36.3%	\$36,362
62 - Health Care and Social Assistance	18,103	27,966	54.5%	\$95,438
72 - Accommodation and Food Services	14,952	15,916	6.4%	\$28,484
Total, all industry sectors	145,625	186,466	28.0%	\$75,204

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Exhibit 22. Industry sector employment trends and average annual earnings, Greater Sacramento (North) region, 2010–2020

Industry Sector	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
11 - Agriculture, Forestry, Fishing & Hunting	14,598	15,472	6.0%	\$53,817
23 - Construction	60,280	94,723	57.1%	\$79,293
31 - Manufacturing	38,757	41,571	7.3%	\$84,974
42 - Wholesale Trade	25,677	29,418	14.6%	\$82,687
44 - Retail Trade	104,641	111,572	6.6%	\$46,062
52 - Finance and Insurance	42,412	42,745	0.8%	\$121,083
53 - Real Estate and Rental and Leasing	18,852	23,566	25.0%	\$73,905
54 - Professional, Scientific, and Technical Services	66,466	73,104	10.0%	\$107,236
61 - Educational Services	16,503	20,393	23.6%	\$44,737
62 - Health Care and Social Assistance	106,468	169,602	59.3%	\$75,464
72 - Accommodation and Food Services	75,576	82,143	8.7%	\$26,945
Total, all industry sectors	1,047,612	1,200,558	14.6%	\$79,138

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.



The research analyzed industry sector data for each of the three subregions. The data are presented in the appendix. Findings from the subregion industry sector analysis include the following:

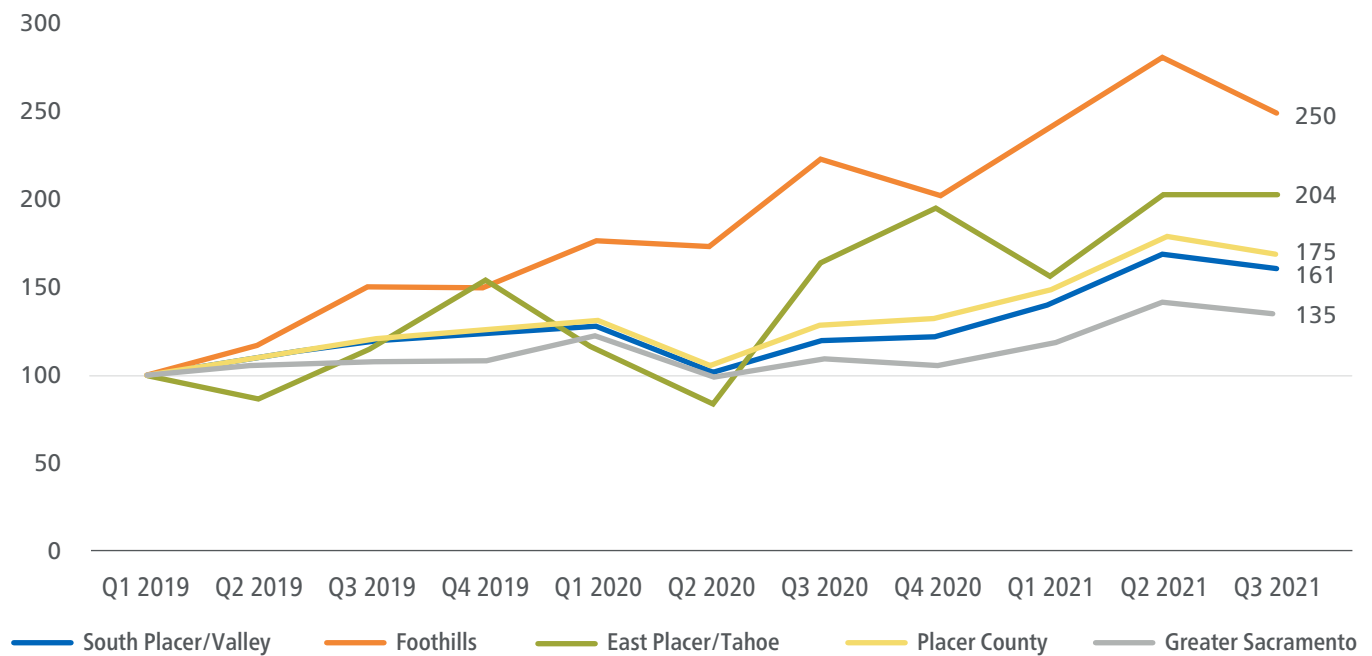
- In the South Placer/Valley and the Foothills subregions, most economic growth rates are in the double digits.
- The East Placer/Tahoe subregion has experienced strong growth in many sectors: Construction; Real Estate and Rental and Leasing; Professional, Scientific, and Technical Services; Educational Services; and Health Care and Social Assistance. Growth rates in these sectors are generally lower in the subregion than in the county overall. But large decreases in other sectors—Finance and Insurance and Accommodation and Food Services—offset overall trends.
- Earnings in nearly all sectors are far lower in the East Placer/Tahoe subregion than in the other two subregions, the county, and the region.
- As compared with the Greater Sacramento region, the South Placer/Valley and Foothills subregions exhibit some key differences in earnings. Manufacturing earnings in the Greater Sacramento region are \$11,000 higher than in the South Placer/Valley subregion but \$26,000 lower than in the Foothills subregion. Regional earnings in Health Care and Social Assistance are \$19,000 more in the South Placer/Valley subregion and \$23,000 higher in the Foothills subregion. Real Estate and Rental and Leasing and Finance and Insurance garner higher earnings in the South Placer/Valley and Foothills subregions than in the region. Professional, Scientific, and Technical Services garner higher earnings at the regional level.
- The Foothills subregion accounts for virtually all job losses in Manufacturing. In the 10-year period studied, the sector lost 1,300 jobs, a reduction of 43%, in the Foothills subregion.
- During the study period, Construction had remarkable growth in all three subregions, with increases of 58% (East Placer/Tahoe), 73% (Foothills), and 77% (South Placer/Valley). Real Estate and Rental and Leasing also had strong growth, with increases of 26% (East Placer/Tahoe), 104% (Foothills), and 62% (South Placer/Valley).
- Health Care and Social Assistance grew by 49% in the South Placer/Valley subregion and by 72.5% in the Foothills subregion in the 10-year period. In the East Placer/Tahoe subregion, the sector gained some 60 jobs for a 59% growth rate.

JOBS POSTINGS



Exhibit 23 shows growth in job postings between Q1 2019 and Q3 2021. The region and all subregions in the county saw large increases in jobs postings volumes in 2021. The Foothills had 2.5 times the number of postings in Q3 2021 as it did in Q1 2019. During the same period, East Placer/Tahoe had the second greatest increase in job postings, nearly doubling them by Q3 2021.

Exhibit 23. Jobs postings trends, Placer County, subregions, and Greater Sacramento (North) region, Q1 2019—Q3 2021, indexed to Q1 2019

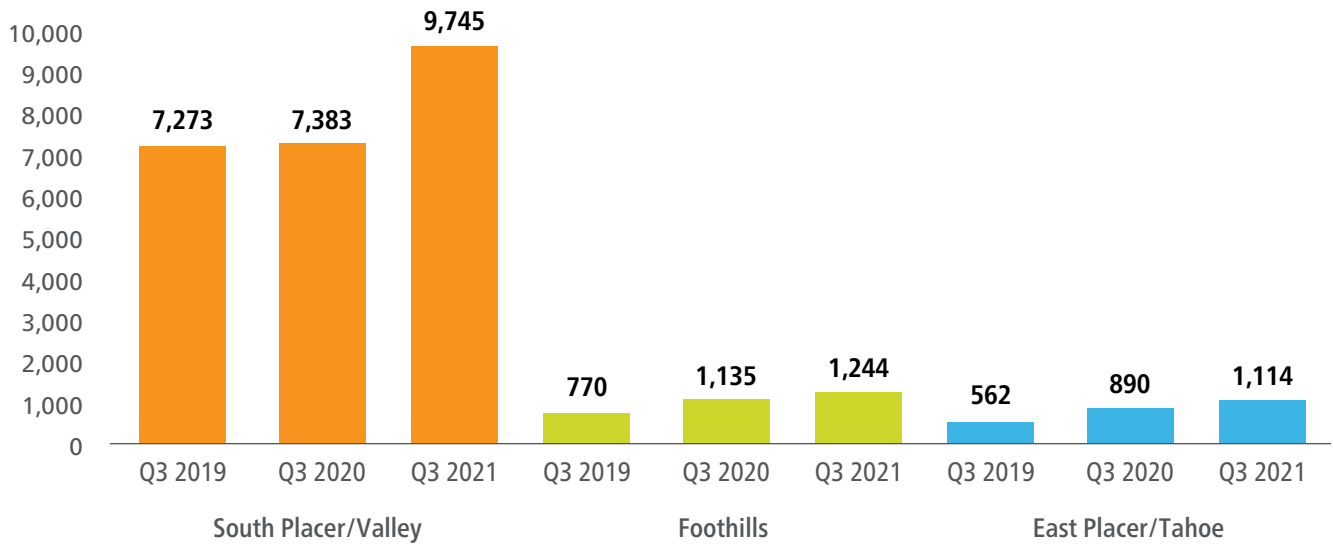


Source: Burning Glass, Labor Insight.



Exhibit 24 compares jobs postings numbers from Q3 2019 through Q3 2021. During this period, all subregions experienced an increase in jobs postings: 34% in South Placer/Valley, 62% in the Foothills, and 98% in East Placer/Tahoe.

Exhibit 24. Jobs postings trends by subregion, all industries, Q3 2019—Q3 2021



Source: Burning Glass, Labor Insight.

The appendix contains detailed jobs postings data for each subregion. The data analysis identifies 2019–2021 trends in jobs postings volumes and top employers and job titles in the postings during Q3 2021.



OCCUPATIONS



Middle-skill occupations represent key training opportunities for postsecondary education and training providers. These occupations require educational attainment beyond a high school diploma (which alone is sufficient for “below-middle-skill” occupations) but less than a bachelor’s degree (attainment of which is needed for “above-middle-skill” occupations). Middle-skill occupations may also require experience or apprenticeships. Exhibit 25 lists some of the top occupations in Placer County by number of jobs and annual openings across skill levels. A complete list indicates hundreds of annual openings in dozens of occupations related to business and administration, allied health, manufacturing, construction, public safety, and other categories.

Exhibit 25. Top occupations by employment and projected annual openings, all skill levels, Placer County, 2020–2025

SOC	Occupation	2020 Employment	2020–2025 Annual Openings	Median Hourly Wage	Skill Level
41-2031	Retail Salespersons	5,070	713	\$14.35	Below Middle Skill
41-2011	Cashiers	4,947	889	\$14.28	Below Middle Skill
31-1128	Home Health and Personal Care Aides	4,779	937	\$14.90	Below Middle Skill
35-3023	Fast Food and Counter Workers	4,672	1,029	\$13.59	Below Middle Skill
29-1141	Registered Nurses	3,736	283	\$67.01	Middle Skill
43-9061	Office Clerks, General	3,675	468	\$19.18	Below Middle Skill
47-2031	Carpenters	3,597	392	\$25.43	Middle Skill
53-7062	Laborers & Freight, Stock & Material Movers	3,311	443	\$17.85	Below Middle Skill
53-7065	Stockers and Order Fillers	3,221	407	\$14.89	Below Middle Skill
13-1111	Management Analysts	3,182	320	\$36.20	Above Middle Skill
35-3031	Waiters and Waitresses	2,749	483	\$15.45	Below Middle Skill
11-1021	General and Operations Managers	2,713	279	\$50.48	Above Middle Skill
37-2011	Janitors and Cleaners, Except Maids	2,484	386	\$16.61	Below Middle Skill
43-4051	Customer Service Representatives	2,411	360	\$18.31	Middle Skill
47-2061	Construction Laborers	2,340	275	\$20.43	Below Middle Skill
37-2012	Maids and Housekeeping Cleaners	2,122	289	\$15.81	Below Middle Skill
13-2011	Accountants and Auditors	2,084	224	\$37.11	Above Middle Skill
41-1011	First-Line Supervisors of Retail Sales Workers	2,078	220	\$20.92	Middle Skill
37-3011	Landscaping and Groundskeeping Workers	2,019	263	\$17.23	Below Middle Skill
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,014	252	\$22.23	Middle Skill
Total Placer County - Top 20 Occupations		63,204	8,912	\$23.09	
% of Total Placer County Employment		34%	38%		

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Exhibit 26 displays the top occupations in Placer County by number of jobs and annual openings for middle-skill occupations. The top occupations relate to allied health, business and administration, construction, early childhood education, and information technology.

Exhibit 26. Top middle-skill occupations by employment and projected annual openings, Placer County, 2020–2025

SOC	Occupation	2020 Employment	2020–2025 Annual Openings	Median Hourly Wage	Skill Level
29-1141	Registered Nurses	3,736	283	\$67.01	Middle Skill
47-2031	Carpenters	3,597	392	\$25.43	Middle Skill
43-4051	Customer Service Representatives	2,411	360	\$18.31	Middle Skill
41-1011	First-Line Supervisors of Retail Sales Workers	2,078	220	\$20.92	Middle Skill
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,014	252	\$22.23	Middle Skill
43-6014	Secretaries & Admin. Assistant., Exc. Legal, Medical	1,931	224	\$20.19	Middle Skill
15-1232	Computer User Support Specialists	1,858	145	\$42.16	Middle Skill
31-9092	Medical Assistants	1,621	238	\$24.37	Middle Skill
43-1011	First-Line Supervisors, Office & Admin. Support	1,607	180	\$30.19	Middle Skill
25-9045	Teaching Assistants, Except Postsecondary	1,528	169	\$16.62	Middle Skill
53-3032	Heavy and Tractor-Trailer Truck Drivers	1,494	240	\$23.11	Middle Skill
39-9011	Childcare Workers	1,461	232	\$14.79	Middle Skill
49-9071	Maintenance and Repair Workers, General	1,425	171	\$22.70	Middle Skill
43-6013	Medical Secretaries & Administrative Assistants	1,315	178	\$23.84	Middle Skill
15-1256	Software Developers & Quality Assurance Analysts	1,246	98	\$56.89	Middle Skill
49-3023	Automotive Service Technicians and Mechanics	1,147	121	\$26.10	Middle Skill
39-5012	Hairdressers, Hairstylists, and Cosmetologists	1,103	136	\$14.95	Middle Skill
11-9198	Personal Service, Entertain. & Recreation Managers	1,096	84	\$36.93	Middle Skill
47-2111	Electricians	1,084	178	\$26.65	Middle Skill
41-4012	Sales Representatives, Wholesale & Manufacturing	1,066	115	\$32.89	Middle Skill
Total Placer County - Top 20 Middle Skill Occupations		34,819	4,016	\$30.06	
% of Total Placer County Employment		19%	17%		

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

The tables with top occupations present a starting point for examining education and training alignment. They also show potential pathways from entry-level jobs to higher-paying jobs that require additional education, training, credentials, and experience.

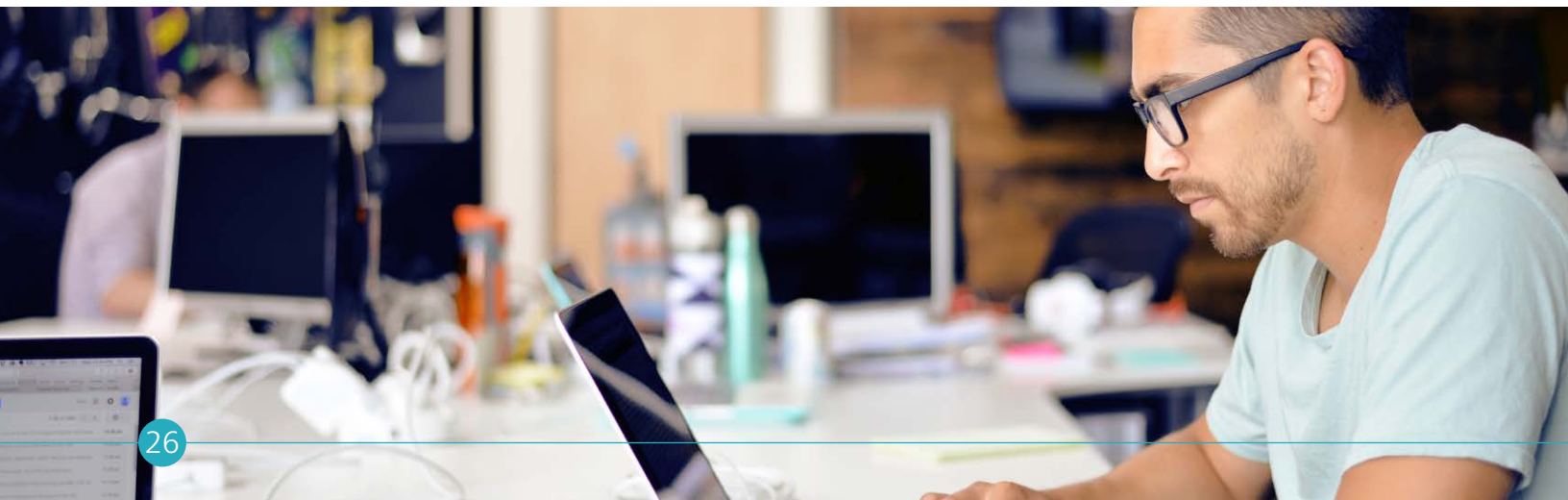


Exhibit 27 presents a more comprehensive list of potential target occupations in occupational categories. These occupations may serve as pathway opportunities for advancement or as opportunities for educational and training supports. The occupations were identified on the basis of the number of jobs and projected annual openings in Placer County between 2020 and 2025.

Exhibit 27. Opportunity occupations by category and skill level, Placer County

Occupation Category	Below Middle Skill	Middle Skill	Above Middle Skill
<i>Business/admin.</i>	<ul style="list-style-type: none"> • Customer service • Office clerks • Retail sales 	<ul style="list-style-type: none"> • Retail supervisors • Bookkeepers • Admin assistants • Sales reps • Real estate brokers/agents • Claims adjusters • Paralegals 	<ul style="list-style-type: none"> • Management analysts • General managers • Project managers • Accountants • HR/marketing managers
<i>Construction</i>	<ul style="list-style-type: none"> • Construction laborers • Painters • Roofers • Installers 	<ul style="list-style-type: none"> • Electricians • Carpenters • Plumbers/pipefitters • HVAC technicians 	<ul style="list-style-type: none"> • Construction managers • Civil engineers
<i>Education</i>	<ul style="list-style-type: none"> • Library assistants 	<ul style="list-style-type: none"> • Childcare workers • Teaching assistants 	<ul style="list-style-type: none"> • Elementary school teachers • Middle school teachers • Secondary school teachers • Edu., career counselors
<i>Health</i>	<ul style="list-style-type: none"> • Home health aides • Lifeguards, ski patrolers • Physical therapist aides 	<ul style="list-style-type: none"> • Medical assistants • Medical secretaries • Nurses/LVNs • Nursing assistants • Dental assistants • Pharmacy technicians • EMT/paramedics • Vet technicians • Lab technicians 	<ul style="list-style-type: none"> • Medical services managers • Nurse practitioners • Social workers • Mental health counselors • Dental hygienists • Physical therapists
<i>Hospitality & tourism</i>	<ul style="list-style-type: none"> • Salespeople/cashiers • Cooks/ food preparers • Bartenders • Food service managers • Servers 	<ul style="list-style-type: none"> • Chefs, head cooks • Hairdressers, cosmetologists • Personal service managers • Recreation workers 	<ul style="list-style-type: none"> • General and operations managers • Meeting, convention managers
<i>Information/ Communications Technology/ Digital Media</i>	<ul style="list-style-type: none"> • Media/ communications workers • Alarm installers 	<ul style="list-style-type: none"> • Software developers • Computer support techs 	<ul style="list-style-type: none"> • Information systems managers • Network systems managers • Programmers
<i>Manufacturing</i>	<ul style="list-style-type: none"> • Fabricators 	<ul style="list-style-type: none"> • Maintenance & repair workers • Welders • Machinists 	<ul style="list-style-type: none"> • Electrical engineers • Production managers
<i>Public safety</i>	<ul style="list-style-type: none"> • Security guards 	<ul style="list-style-type: none"> • Police/sheriff's officers • Firefighters 	

EDUCATION AND TRAINING: SIERRA COLLEGE



Sierra College serves Placer County and the surrounding region with dozens of career education programs. In addition to its main campus in Rocklin, Sierra College has two satellite campuses: the Nevada County campus in Nevada City and Grass Valley and the Tahoe-Truckee campus.

Sierra College’s programs broadly align with the occupation demand areas identified in the present analysis. Exhibit 28 provides a summary of Sierra College’s programs. The analysis generally includes neither non-career education programs nor programs that are mostly focused on programs for transfer to four-year universities.

Exhibit 28. Career education programs overview, Sierra College

Program Areas	Sierra College Programs
<i>Agriculture</i>	<ul style="list-style-type: none"> • Sustainable agriculture • Urban and wildland forestry
<i>Business/admin.</i>	<ul style="list-style-type: none"> • Accounting • Business administration, general business • Business information worker • Bookkeeping • Entrepreneurship • Fashion merchandising • Management • Marketing • Payroll professional • Real estate • Retail management • Taxation
<i>Construction</i>	<ul style="list-style-type: none"> • Construction fundamentals, construction basics • Construction management • Energy surveying and lighting retrofits
<i>Education</i>	<ul style="list-style-type: none"> • Child development, early childhood education, associate teacher, site supervisor, infant toddler • Elementary, secondary, dual-enrollment school teacher • Pre-school teacher/transitional kindergarten • Professor, career technical education teacher • Special education teacher
<i>Health</i>	<ul style="list-style-type: none"> • Allied health: general, precertification nursing assistant • Emergency medical sciences • Fitness trainer • Health education • Health sciences • Kinesiology • Licensed vocational nursing • Medical assisting • Nutrition and dietetics, nutrition and fitness • Phlebotomy • Pre-nursing • Pre-paramedic • Registered nursing; bachelor’s in nursing

(Continued)

Program Areas (continued)

Sierra College Programs (continued)

Hospitality and Tourism

- Recreation management

*Information Communications
Technology/Digital Media*

- Cybersecurity, information assurance and cyber defense
- Data analytics, data specialist
- Digital animation
- Digital illustration
- Digital media
- Fashion media, design
- Film and video production
- Geographic information systems (GIS)
- Graphic design
- IT technician
- Photography and video, digital imaging
- Network technician
- Web design

*Manufacturing, Engineering
Support*

- Advanced manufacturing, machining
- Drafting and engineering support: architectural/civil
- Drafting and engineering support: mechanical/civil
- Drafting essentials
- Electro-mechanical
- Mechanical drafting
- Mechatronics technology
- Metal fabricator and designer
- Welding technology, gas metal arc, gas tungsten arc, shielded metal arc

Public Safety

- Administration of justice: corrections, courts, law enforcement
- Firefighter/academy
- Fire company officer, firefighter II
- Fire technology
- Reserve peace officer

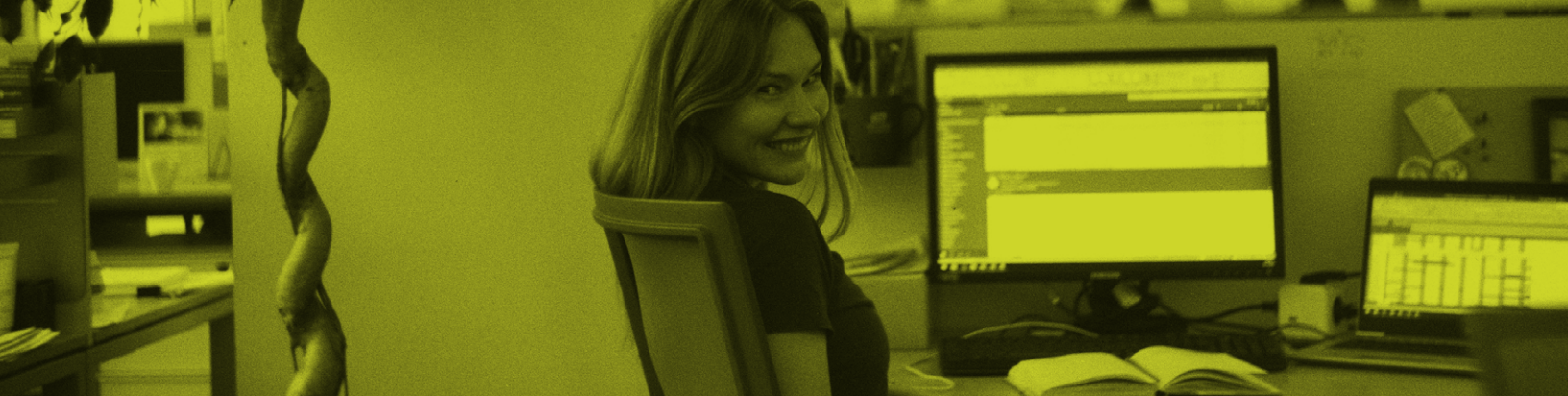


Between the 2018–2019 and 2020–2021 academic years, Sierra College awarded 1,400 degrees and 780 certificates in nearly 100 career education program areas. Exhibit 29 displays the 3-year average awards by program.

Exhibit 29. Sierra College, 3-year average degrees and certificates by 6-digit program code, 2018–2019 to 2020–2021 academic years

Program – TOP Code	3-Year Avg. Degrees	3-Year Avg. Certs
Accounting-050200	77	72
Administration of Justice-210500	149	11
Agriculture Technology and Sciences, General-010100	17	16
Applied Photography-101200	12	24
Architectural Drafting-095310	5	16
Automotive Technology-094800	5	9
Business Administration-050500	342	0
Business and Commerce, General-050100	40	30
Business Management-050600	23	10
Carpentry-095210	0	0
Child Development Administration and Management-130580	2	1
Child Development/Early Care and Education-130500	31	21
Civil and Construction Management Technology-095700	1	0
Commercial Music-100500	0	1
Computer Information Systems-070200	4	1
Computer Infrastructure and Support-070800	0	27
Computer Networking-070810	22	10
Computer Programming-070710	34	0
Computer Systems Analysis-070730	0	0
Construction Crafts Technology-095200	1	3
Corrections-210510	5	0
Drafting Technology-095300	0	14
Emergency Medical Services-125000	1	11
Energy Systems Technology-094610	0	3
Environmental Technology-030300	2	1
Fashion Design-130310	0	3
Fashion Merchandising-130320	0	7
Fashion-130300	6	4
Fire Academy-213350	0	33
Fire Technology-213300	47	46
Fitness Trainer-083520	0	7
Forestry-011400	0	0
Geographic Information Systems-220610	0	6
Graphic Art and Design-103000	42	40

continued



Program – TOP Code (continued)	3-Year Avg. Degrees	3-Year Avg. Certs
Health Occupations, General-120100	202	186
Health Professions, Transfer Core Curriculum-126000	140	0
Industrial Electronics-093420	23	36
Infants and Toddlers-130590	0	2
Journalism-060200	9	0
Kinesiology-127000	17	0
Manufacturing and Industrial Technology-095600	12	3
Marketing and Distribution-050900	11	6
Mechanical Drafting-095340	3	8
Medical Assisting-120800	0	7
Multimedia-061410	20	10
Nutrition, Foods, and Culinary Arts-130600	1	0
Office Technology/Office Computer Applications-051400	13	21
Other Health Occupations-129900	0	6
Other Information Technology-079900	0	2
Paramedic-125100	0	2
Real Estate-051100	3	4
Recreation Assistant-083610	0	0
Recreation-083600	14	0
Registered Nursing-123010	37	0
Sign Language Interpreting-085010	18	13
Small Business and Entrepreneurship-050640	7	5
Software Applications-070210	4	8
Technical Theater-100600	0	2
Welding Technology-095650	0	29
Total	1,403	776

Source: California Community Colleges Chancellor's Office MIS System, DataMart, <https://datamart.cccco.edu/datamart.aspx>.

FINDINGS AND RECOMMENDATIONS



Placer County stands out in the Greater Sacramento region and the state for having remarkable industry and workforce assets. The growth of the county's population and employment in key industry sectors is a testament to the county's strong economy over the last 10 years. The county has demonstrated a measure of resilience during the pandemic, though data indicate that large concentrations of jobs in affected sectors may have produced greater impacts on Placer County's economy than on the Greater Sacramento region's economy. Labor market research on Placer County indicates that the economy has entered a recovery phase. In many cases, labor markets and industry sectors have returned to pre-pandemic levels.

The research presents the following key findings:

Labor market data strongly indicate that the economy of Placer County is recovering from the economic impacts of the pandemic.

Unemployment, labor force, and weekly initial claims data indicate that Placer County has had a rapid recovery from the economic impacts of the pandemic. By fall 2021, the county's unemployment declined to 5.1%—higher than pre-pandemic levels, but much lower than the double-digit levels of the spring and summer of 2020. Placer County has routinely had lower unemployment rates and higher labor force rates than the Greater Sacramento region and the state.

Over the last 10 years, Placer County experienced exceptional economy-wide growth. Construction, Health Care and Social Assistance, Educational Services, and Professional, Scientific, and Technical Services had remarkably high growth rates.

Between 2010 and 2019, the job growth percent change (37%) in Placer County was 18% higher than that in the Greater Sacramento region (19%). In the county, Construction grew by 74%, Health Care and Social Assistance by 55%, Educational Services by 36%, and Professional, Scientific, and Technical Services by 34%. With the exception of health care and manufacturing, growth was stronger in the county than in the region.

Several industry sectors in Placer County experienced the largest job losses during the pandemic. Compared with the Greater Sacramento region, the county lost a larger share of jobs in Manufacturing and Wholesale Trade.

Accommodation and Food Services, Wholesale Trade, Educational Services, Retail Trade, and Manufacturing saw the largest annual (2019–2020) and monthly declines in jobs numbers during the pandemic in Placer County. All these industry sectors were affected by pandemic-related closures. An examination of monthly and annual job totals indicates that the county had larger job losses than the Greater Sacramento region in Manufacturing and Wholesale Trade.

Manufacturing poses concerning trends for Placer County, especially in the Foothills subregion.

In 2020, the manufacturing sector in Placer County (5,800 jobs) represented 14% of the Greater Sacramento region's manufacturing employment. The county's manufacturing sector lost nearly 19% of its jobs (1,300 jobs) between 2010 and 2020. The data indicate nearly all the decline in employment between 2010 and 2019 was in the Foothills subregion. Between 2019 and 2020, the Foothills and the East Placer/Tahoe subregions maintained or gained employment in the sector. The South Placer/Valley subregion lost 300 manufacturing jobs between 2019 and 2020.

The analysis indicates the economy of the Foothills subregion withstood the onset of the pandemic better than the economies of the county and the region.

Unemployment data indicate that the Foothills subregion has had slightly higher unemployment rates and lower labor force totals than the county overall during the pandemic. However, the subregion's remarkable long-term growth rate—29% between 2010 and 2020—buoyed the subregion's economy. The subregion lost just 2.1% of total jobs between 2019 and 2020, a 3% lower share than the county and a 2% lower share than the region. The subregion lost significantly fewer jobs as a share of the total in Construction, Manufacturing, Wholesale Trade, and Retail Trade.

The East Placer/Tahoe subregion has experienced slower growth and lower wages, but is seeing some encouraging trends.

The East Placer/Tahoe subregion's long-term growth rate—8% between 2010 and 2020—was 20% lower than the county's growth rate. The subregion suffered the largest impacts from the pandemic, losing 12% of its employment between 2019 and 2020 as a result of its large share of jobs in Accommodation and Food Services (27% of jobs). The subregion's average annual earnings per job are nearly \$19,000 lower than the county's earnings. Over the 10-year study period, several sectors in the subregion had significant growth. They include Educational Services, Health Care and Social Assistance, and Professional, Scientific, and Technical Services. These sectors also added jobs or lost few jobs during 2020.

The retirement-age populations of the county and the region have significantly increased.

The county’s population is getting older, with county-wide increases in retirement-age populations, particularly in the Foothills and the East Placer/Tahoe subregions. East Placer/Tahoe is a special case because it has the largest share of populations age 54 and under. But between 2011 and 2019, it experienced the fastest decreases in working-age populations and the largest increases in retirement-age populations. These trends were only slightly less significant in the Foothills subregion.

The pandemic had the largest impacts on women, certain minority groups, and the youngest and oldest workers.

The data on weekly initial unemployment claims by race in Placer County show the most significant increases in the number of claims relative to the share of total from Asians and African Americans. Women were a third of claimants before the pandemic but more than half of claimants throughout 2020 and 2021. The share of workers filing for unemployment claims jumped most dramatically for workers in the age categories 20–24 and 65–85.

Jobs postings may indicate employer challenges in recruiting workers.

Between 2019 and 2021, jobs postings increased markedly for all subregions, the county, and the Greater Sacramento region. Throughout 2021, jobs postings volumes in Placer County were 50% to 80% higher than at the beginning of 2019. Every sector saw large increases in postings. The largest share of postings was in Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, Finance and Insurance, and Educational Services. The vast majority of jobs postings from the East Placer/Tahoe subregion were from employers in Accommodation and Food Services and in Construction.

There are hundreds of projected annual openings in key occupational categories, including dozens of openings for middle-skill occupations.

Middle-skill occupations represent key targets for community colleges and other postsecondary education and training providers. Occupational demand projections in Placer County over the next five years show hundreds of annual openings in business and administration, construction, education, health, hospitality and tourism, information and communication technologies, manufacturing, and public safety. Occupational demand in these categories indicate numerous pathway opportunities for recruitment and advancement with workforce education and training interventions.

Sierra College annually awards nearly 2,200 certificates and degrees in nearly 100 career education program categories that align with key industries and occupations identified in the analysis.

Sierra College possesses an enormous wealth of career education programs in credit and noncredit offerings. Many of these programs are in categories broadly aligned with areas of occupational demand. The programs include administration of justice and public safety, advanced manufacturing, building industries, business, drafting and engineering support, early childhood education, information technology, allied health, recreation management, and technical arts.

To address the issues revealed in the findings, the research team makes the following recommendations:

Local workforce and economic development stakeholders should continue enhancing coordination with industry partners to ensure alignment of public investment and business needs.

Advancing coordination between regional workforce stakeholders and economic development stakeholders can address hiring challenges and ensure employment opportunities for students in career education programs. The Placer County Economic Development Stakeholders Group, consisting of services providers and other representatives of the business community, should continue to engage workforce development entities such as the Golden Sierra Workforce Development Board and Sierra College to address workforce topics.



Workforce stakeholders and economic development stakeholders in Placer County should use regional planning and investment strategies to address long-term industry gaps and short-term impacts from the pandemic.

The Prosperity Strategy, the Comprehensive Economic Development Strategy (CEDS) for the Greater Sacramento region, outlines specific regional economic and workforce development priorities. Placer County should continue to align and connect its workforce and economic development strategy with the CEDS efforts in two key ways. First, Valley Vision, a regional civic leadership organization that has a robust workforce planning and engagement program and that produces regional workforce advisories with business and workforce partners, should continue to inform planning and strategy. Second, business and economic developers and regional workforce stakeholders should engage in the annual strategic planning of the California Community Colleges’ Strong Workforce Program, which annually invests millions in education and training programs in the Greater Sacramento region, including Sierra College programs, to ensure that dollars are meeting the needs of the local and regional workforce and economy.

Workforce intermediaries and stakeholders should ensure their outreach efforts and services expressly engage those disproportionately impacted by the pandemic.

Unemployment claims for women, certain minority groups, and the youngest and oldest workers massively spiked during the onset of the pandemic. Workforce services should make special efforts to engage these groups and create strategies and investments to ensure they have assistance and opportunities to transition to new careers or to reenter the workforce. Creating strategies may involve working with outreach and assistance intermediaries already engaging these groups, establishing appropriate job-seeker networks, and holding focus groups to tailor services.

Incentives, technical assistance, workforce solutions, and other interventions can help the manufacturing sector reverse course in Placer County.

Regional and local partners should continue engaging manufacturing businesses and statewide and national supports to retain and grow manufacturing companies in Placer County. Technical assistance to manufacturing businesses from organizations like California Manufacturing Technology Consulting (CMTC) can support commercialization, the opening of new markets, technology adoption, and streamlining of supply chains. Business supports and workforce supports should be connected regionwide to ensure that companies have easy access to talent from training and education programs, especially at Sierra College, which has a wealth of programs relevant to in-demand jobs.

The Foothills subregion’s economy has high earnings and growth rates and has lost fewer jobs than other subregions, the county, and the region during the pandemic. The subregion can offer lessons to other rural and suburban areas.

The data show that the Foothills subregion could offer a case study for rural and suburban economic development. Quality-of-life indicators, high-road employers, and economic diversification factors likely contribute to the subregion’s success. Further research and engagement can provide additional insight into the subregion’s success. One forum for exploring and sharing subregional practices is the quarterly meetings of the Rural Exchange hosted by CALED, the state’s professional association for local economic developers.

County and regional partners should directly support local economic and workforce development efforts that address challenges in the East Placer/Tahoe subregion.

The East Placer/Tahoe subregion faces a host of challenges: rapid aging of the population, pandemic impacts related to visitation, an economy dominated by the hard-hit construction and hospitality industries, and a high cost of living. Several engagement, technical assistance, and funding support efforts merit attention from the county and the region. The Sierra Business Council holds the Sierra region’s CEDS, hosts a regional SBDC, and has housing and forest management initiatives that address economic development and cost-of-living issues. The Truckee Chamber of Commerce has housing and workforce projects. The Sierra Nevada Conservancy has the Vibrant Recreation and Tourism initiative to address visitation impacts. The Tahoe Prosperity Center has housing, workforce, and broadband initiatives for the basin region. A new initiative, Envision Tahoe, outlines a planning process to diversify the basin’s economy.



APPENDIX



Exhibit A1. Subregional geography data definition for zip codes (LAUS, Emsi)

Subregion	Zip Codes
South Placer/Valley	95648, 95650, 95661, 95663, 95677, 95678, 95681, 95746, 95747, 95765
Foothills	95602, 95603, 95631, 95658, 95701, 95703, 95713, 95714, 95715, 95717, 95722
East Placer/Tahoe	96140, 96141, 96143, 96145, 96146, 96148

Source: COE adaptation of Beacon Economics studies of Placer County.

Exhibit A2. Subregional geography data definition for cities and towns (Burning Glass)

Subregion	Cities and towns
South Placer/Valley	Granite Bay, Lincoln, Loomis, Rocklin, Roseville
Foothills	Auburn, Colfax, Foresthill, Meadow Vista
East Placer/Tahoe	Carnelian Bay, Homewood, Kings Beach, Olympic Valley, Squaw Valley, Tahoe City, Tahoe Vista

Source: COE adaptation of Beacon Economics studies of Placer County.

Exhibit A3. Age demographics, Placer County, 2011–2019

	2011		2019	
19 years and under	92,708	27%	95,006	25%
20 to 34 years	56,307	16%	62,382	16%
35 to 54 years	99,717	29%	102,456	27%
55 to 64 years	42,852	12%	51,896	13%
65 years and over	51,970	15%	73,772	19%
Total	343,554	100%	385,512	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Exhibit A4. Age demographics, South Placer/Valley subregion, 2011–2019

	2011		2019	
19 years and under	74,388	28%	78,566	26%
20 to 34 years	44,696	17%	49,205	16%
35 to 54 years	75,435	29%	81,944	27%
55 to 64 years	29,658	11%	37,069	12%
65 years and over	37,634	14%	53,636	18%
Total	261,811	100%	300,420	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Exhibit A5. Age demographics, Foothills subregion, 2011–2019

	2011		2019	
19 years and under	16,704	22%	15,465	20%
20 to 34 years	9,230	12%	11,168	14%
35 to 54 years	21,656	29%	18,478	23%
55 to 64 years	12,666	17%	14,291	18%
65 years and over	14,313	19%	19,460	25%
Total	74,569	100%	78,862	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Exhibit A6. Age demographics, East Placer/Tahoe subregion, 2011–2019

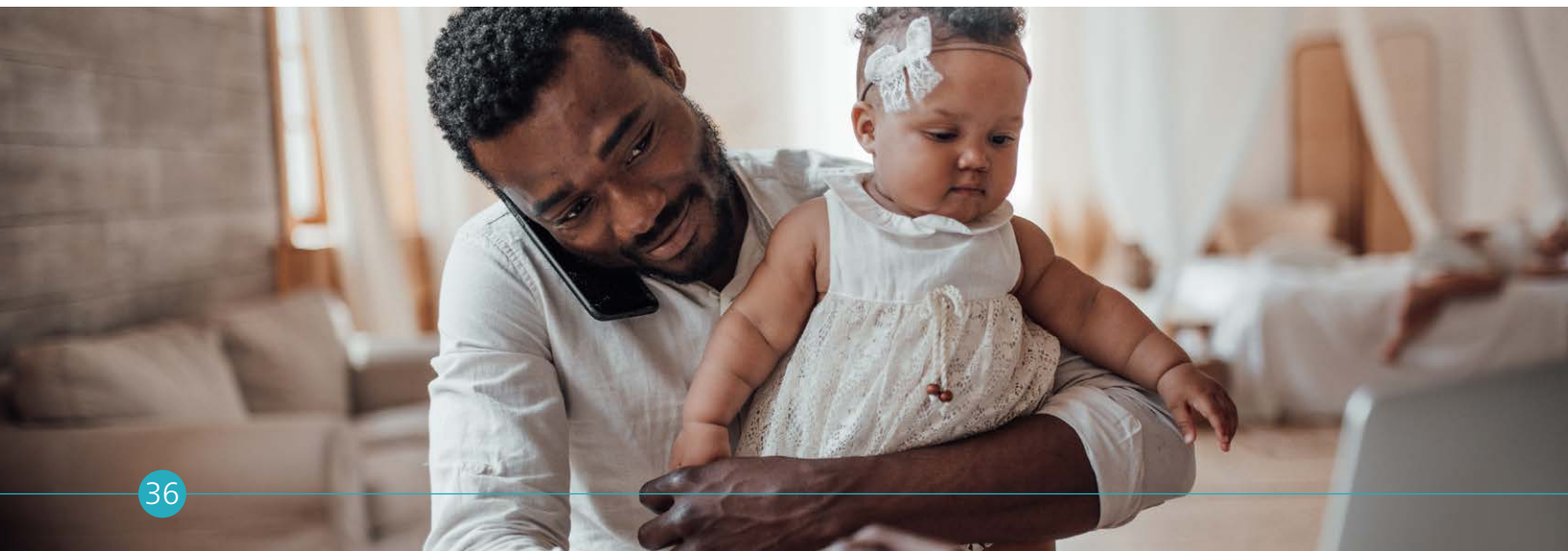
	2011		2019	
19 years and under	2,141	21%	1,460	17%
20 to 34 years	2,341	23%	1,995	23%
35 to 54 years	3,307	32%	2,321	26%
55 to 64 years	1,374	13%	1,349	15%
65 years and over	1,067	10%	1,688	19%
Total	10,230	100%	8,813	100%

Source: U.S. Census Bureau, American Community Survey (ACS), 1-year estimates.

Exhibit A7. Employment and unemployment annual average totals, 2010–2020

Subregion		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
East Placer/ Tahoe	Emp.	9,890	9,990	10,230	6,390	6,190	6,330	5,730	5,240	5,160	5,450	5,110
	Unemp.	1,470	1,340	1,170	490	370	290	200	130	110	60	110
Foothills	Emp.	38,550	38,910	39,810	31,940	32,110	32,770	33,660	34,310	34,940	35,990	33,760
	Unemp.	5,870	5,460	4,730	3,120	2,640	2,160	1,880	1,640	1,330	1,310	2,970
South Placer/ Valley	Emp.	102,860	103,830	106,270	123,000	125,940	128,510	133,030	135,770	140,530	142,030	133,270
	Unemp.	13,120	12,230	10,590	10,080	8,130	6,570	6,050	5,380	4,620	4,660	10,650

Source: California Employment Development Department, Labor Market Information Division (LMID), Labor Force and Unemployment, <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>.



The industry composition in the South Placer Valley subregion closely resembles that of the county as a whole (Exhibit A8). Health Care and Social Assistance surpassed Retail Trade as the industry with the largest share of employment in the subregion in 2020. Health Care and Social Assistance experienced a 49% percent change in the 10-year study period. Jobs in this industry sector have some of the highest average annual earnings in the subregion.

Exhibit A8. Industry sector employment trends and average annual earnings, South Placer/Valley subregion, 2010–2020

Industry Sector	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
11 - Agriculture, Forestry, Fishing & Hunting	277	289	4.2%	\$51,273
23 - Construction	8,841	15,604	76.5%	\$80,088
31 - Manufacturing	4,018	3,968	-1.2%	\$73,858
42 - Wholesale Trade	3,652	4,303	17.8%	\$87,258
44 - Retail Trade	16,672	18,735	12.4%	\$48,134
52 - Finance and Insurance	7,425	8,207	10.5%	\$141,803
53 - Real Estate and Rental and Leasing	3,006	4,854	61.5%	\$86,793
54 - Professional, Scientific & Tech. Servs.	6,996	9,388	34.2%	\$87,698
61 - Educational Services	1,878	2,489	32.5%	\$36,156
62 - Health Care and Social Assistance	13,838	20,663	49.3%	\$94,800
72 - Accommodation and Food Services	9,893	11,190	13.1%	\$27,209
Total	111,509	144,333	29.4%	\$75,442

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Health Care and Social Assistance remained the largest industry sector for employment in the Foothills subregion between 2010 and 2020 (Exhibit A9). This sector experienced a nearly 73% change in the 10-year study period. Construction and Real Estate and Rental and Leasing also saw significant growth at 73% and 104%, respectively. Jobs in all three of these industry sectors have some of the highest average annual earnings in the subregion.

Exhibit A9. Industry sector employment trends and average annual earnings, Foothills subregion, 2010–2020

Industry Sector	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
11 - Agriculture, Forestry, Fishing & Hunting	57	69	19.9%	\$54,690
23 - Construction	2,016	3,494	73.3%	\$76,509
31 - Manufacturing	2,999	1,719	-42.7%	\$111,132
42 - Wholesale Trade	367	548	49.6%	\$86,123
44 - Retail Trade	3,030	3,623	19.6%	\$50,021
52 - Finance and Insurance	522	440	-15.7%	\$131,891
53 - Real Estate and Rental and Leasing	541	1,103	104.0%	\$105,671
54 - Professional, Scientific & Tech. Servs.	1,513	2,049	35.5%	\$85,404
61 - Educational Services	198	302	52.5%	\$38,281
62 - Health Care and Social Assistance	4,066	7,014	72.5%	\$98,863
72 - Accommodation and Food Services	1,998	2,326	16.4%	\$27,234
Total	24,647	31,893	29.4%	\$79,667

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Accommodation and Food Services, Construction, and Retail Trade were the largest industry sectors in terms of employment in the East Placer/Tahoe subregion between 2010 and 2020 (Exhibit A10). Accommodation and Food Services saw a 22% reduction in jobs in the 10-year study period. Construction saw a remarkable increase in jobs, growing by 58%. Real Estate and Rental and Leasing and Professional, Scientific, and Technical Services also saw significant job increases.

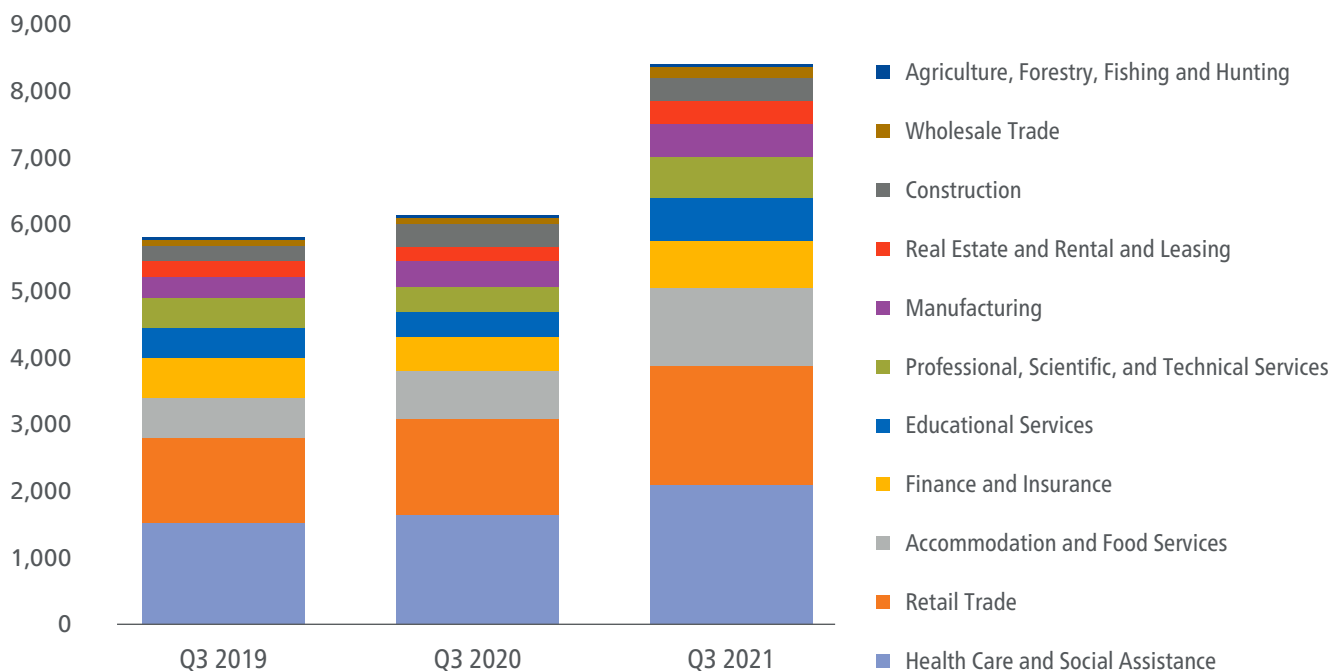
Exhibit A10. Industry sectors employment trends and average annual earnings, East Placer/Tahoe subregion, 2010–2020

Industry Sector	2010 Jobs	2020 Jobs	% Change 2010–2020	Avg. Annual Earnings
11 - Agriculture, Forestry, Fishing & Hunting	81	121	48.9%	\$61,774
23 - Construction	1,038	1,640	57.9%	\$73,678
31 - Manufacturing	46	62	34.2%	\$44,830
42 - Wholesale Trade	25	18	-29.4%	\$86,037
44 - Retail Trade	641	688	7.3%	\$43,681
52 - Finance and Insurance	137	61	-55.1%	\$166,812
53 - Real Estate and Rental and Leasing	380	480	26.3%	\$77,934
54 - Professional, Scientific & Tech. Servs.	318	384	20.9%	\$81,988
61 - Educational Services	97	173	77.5%	\$36,173
62 - Health Care and Social Assistance	105	167	58.6%	\$54,014
72 - Accommodation and Food Services	3,059	2,399	-21.6%	\$35,623
Total	8,339	9,007	8.0%	\$56,295

Source: Emsi, 2021.3 QCEW, Non-QCEW, Self-employed.

Job postings in South Placer Valley by industry increased proportionally in the three time periods presented (Exhibit A11). The three largest industries, Health Care and Social Assistance, Retail Trade, and Accommodation and Food Services had the greatest number of open postings.

Exhibit A11. Jobs postings volumes by industry, South Placer/Valley subregion, Q3 comparison, 2019–2021



Source: Burning Glass, Labor Insight.

Exhibit A12. Top employers in jobs postings, South Placer/Valley subregion, Q3 2021

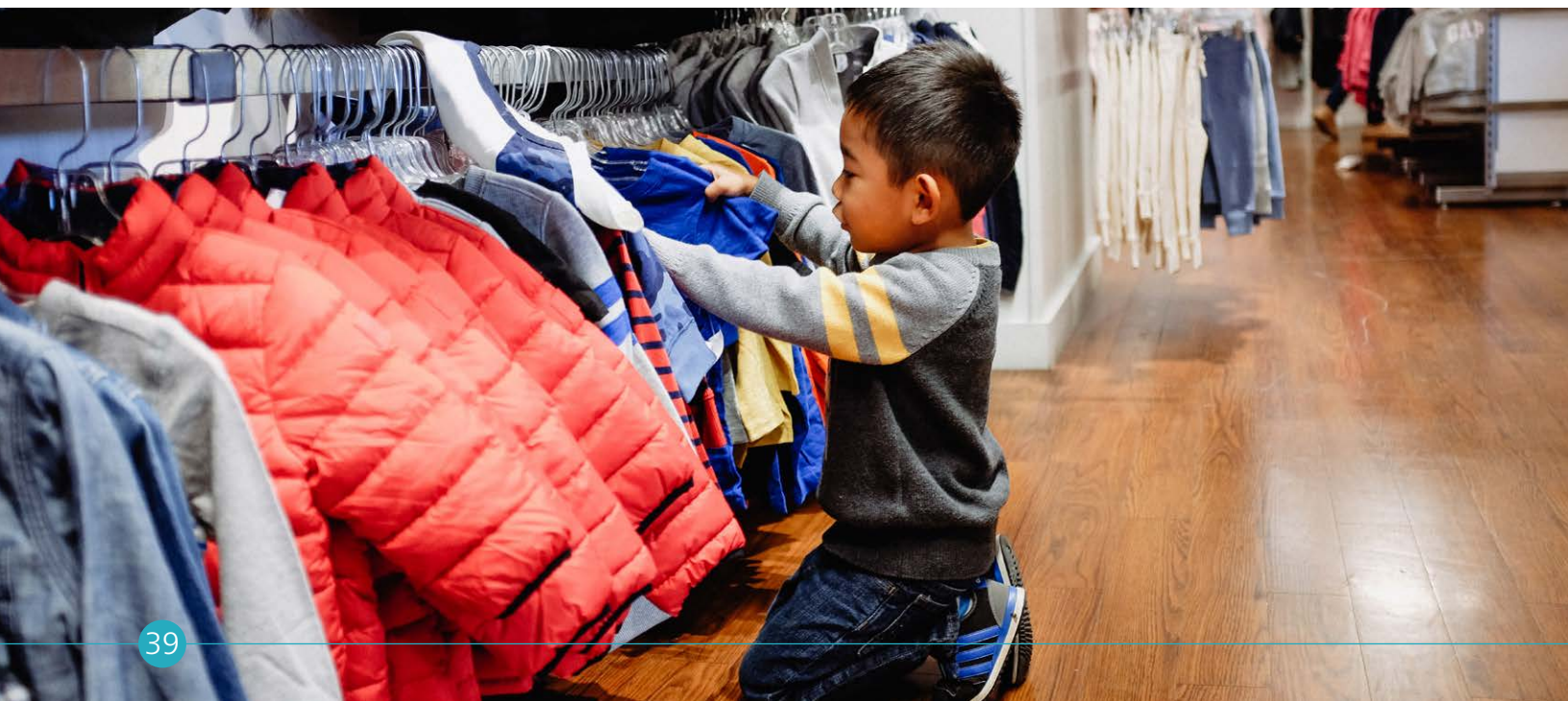
Sutter Health	209	1.7%
Adventist Health	149	1.2%
Advantage Sales & Marketing	135	1.1%
Western Placer Unified School District	132	1.1%
Kaiser Permanente	125	1.0%
Amazon	106	0.8%
Rocklin Unified School District	96	0.8%
Autonation	83	0.7%
Nordstrom	82	0.7%
Gap Inc.	79	0.6%
Total	1,196	9.6%

Source: Burning Glass, Labor Insight.

Exhibit A13. Top job titles in jobs postings, South Placer/Valley subregion, Q3 2021

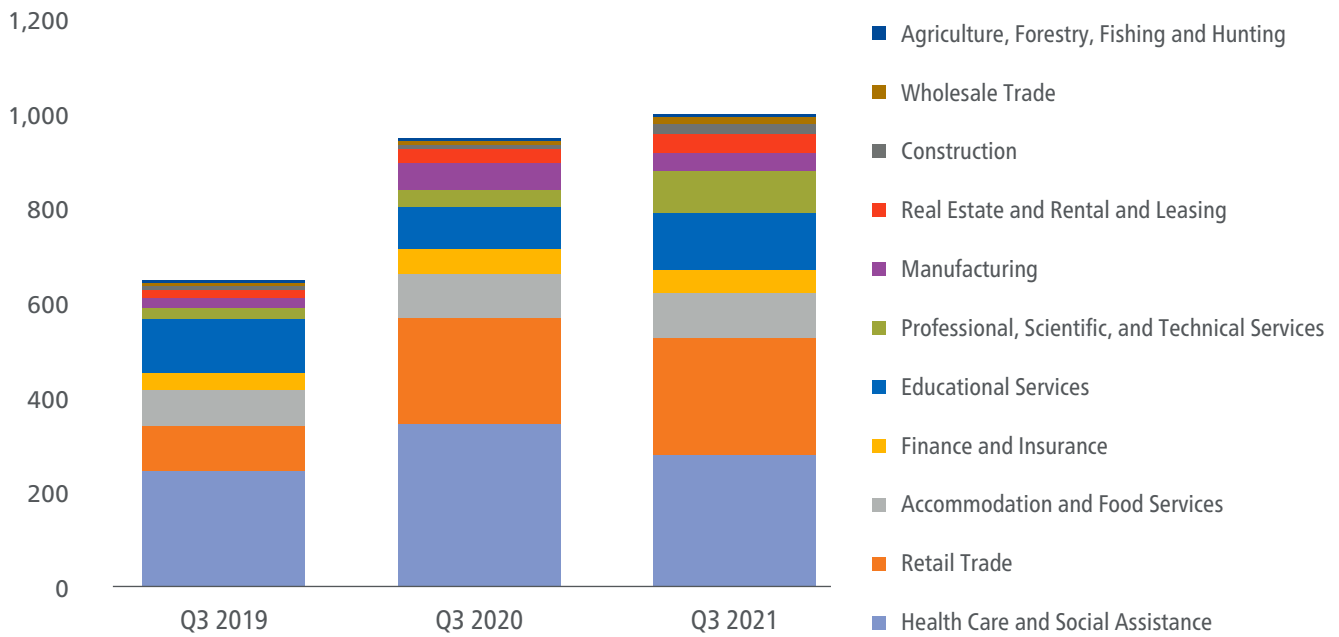
Administrative Assistant	64	0.5%
Sales Associate	59	0.5%
Assistant Manager	57	0.5%
Caregiver	48	0.4%
Server	45	0.4%
Dishwasher	42	0.3%
Retail Sales Associate	40	0.3%
Customer Service Representative	39	0.3%
Team Member	35	0.3%
Housekeeper	33	0.3%
Total	462	3.7%

Source: Burning Glass, Labor Insight.



Job postings in the Foothills by industry saw a larger percentage of growth in Retail Trade than in other industry sectors over the three time periods presented (Exhibit A14). The two largest sectors, Health Care and Social Assistance and Retail Trade had the greatest number of open postings and accounted for more than half of all open listings.

Exhibit A14. Jobs postings volumes by industry, Foothills subregion, Q3 comparison, 2019–2021



Source: Burning Glass, Labor Insight.

Exhibit A15. Top employers in jobs postings, Foothills subregion, Q3 2021

Sutter Health	67	4.2%
Advantage Sales & Marketing	46	2.9%
Placer County	37	2.3%
Placer County Office Education	33	2.1%
Placer Union High School District	28	1.7%
Auburn Union Elementary School	26	1.6%
Chapa De Indian Health	19	1.2%
Placer Hills Union School District	18	1.1%
Smart & Final Stores	18	1.1%
Autonation	17	1.1%
Total	309	19.3%

Source: Burning Glass, Labor Insight.

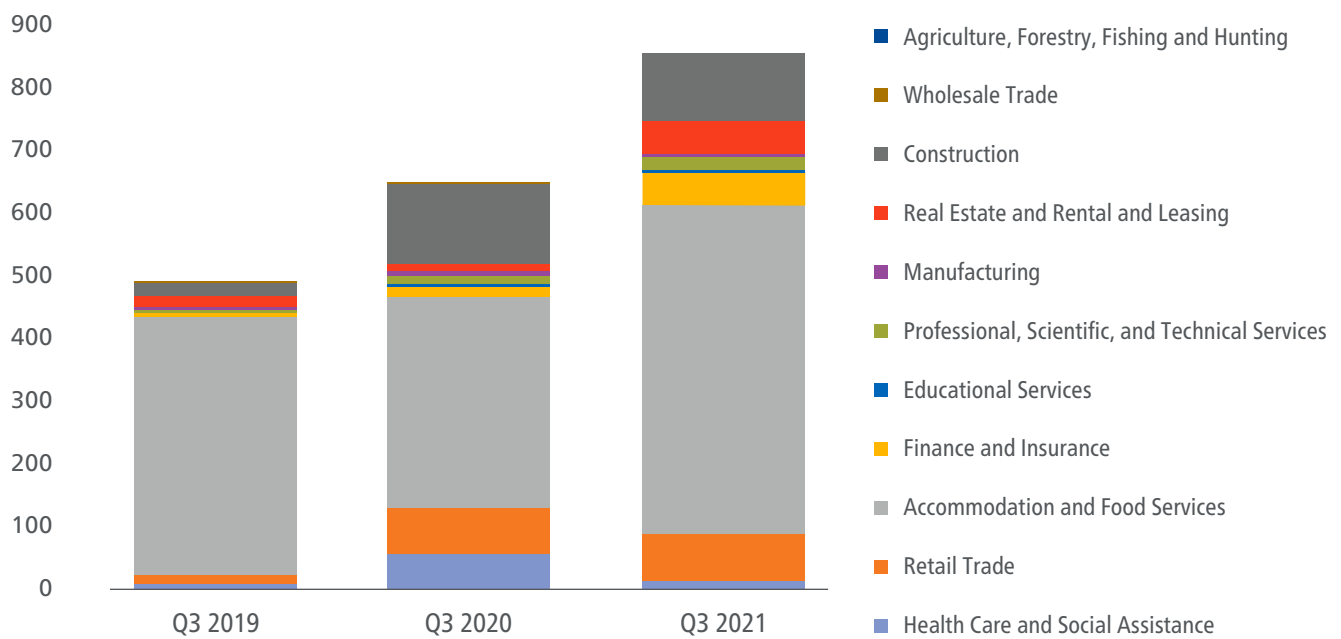
Exhibit A16. Top job titles in jobs postings, Foothills subregion, Q3 2021

Administrative Professional	34	2.1%
Caregiver	31	1.9%
Truck Driver	20	1.2%
Customer Service Associate/Representative	17	1.1%
Registered Nurse	17	1.1%
Cashier	15	0.9%
Barista	14	0.9%
Assistant Manager/Team Lead	12	0.7%
Sales Associate	12	0.7%
Dental Assistant	11	0.7%
Total	183	11.4%

Source: Burning Glass, Labor Insight.

Job postings in East Placer/Tahoe by industry saw Accommodation and Food Services remain the subregion’s dominant industry (Exhibit A17). But the largest percentage of job postings growth, especially during the 3Q 2020 and 3Q 2021 periods, was in Construction, Retail Trade, and Real Estate and Rental and Leasing.

Exhibit A17. Jobs postings by industry, East Placer/Tahoe subregion, Q3 comparison, 2019–2021



Source: Burning Glass, Labor Insight.

Exhibit A18. Top employers in jobs postings, East Placer/Tahoe subregion, Q3 2021

Squaw Valley Alpine Meadows	340	29.1%
Northstar Incorporated	102	8.7%
Vail Resorts Management Company	93	8.0%
Resort at Squaw Creek	70	6.0%
Marriott International Incorporated	59	5.0%
Homewood Resort and Marina	57	4.9%
Hyatt	50	4.3%
Vacasa	25	2.1%
Dependable Highway Express	22	1.9%
Aspen Skiing Company	19	1.6%
Total	837	71.6%

Source: Burning Glass, Labor Insight.

Exhibit A19. Top job titles in jobs postings, East Placer/Tahoe subregion, Q3 2021

Housekeeper	47	4.0%
Chef	28	2.4%
Cook	25	2.1%
Shuttle and Professional Driver	25	2.1%
Server	24	2.1%
Ski & Snowboard School Instructor	24	2.1%
Retail Store Manager	22	1.9%
Front Desk Agent	21	1.8%
Terrain Park Groomer	17	1.5%
Concierge	16	1.4%
Total	249	21.3%

Source: Burning Glass, Labor Insight.





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