

Economic and Workforce Development Opportunities in San Mateo County's Labor Market: A Snapshot and Preliminary Analysis

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Outline

- Overview
- Demographics
- Overall composition of employment
 - Industry & Occupation
- Changing employment dynamics
- Conclusion



Workforce Development

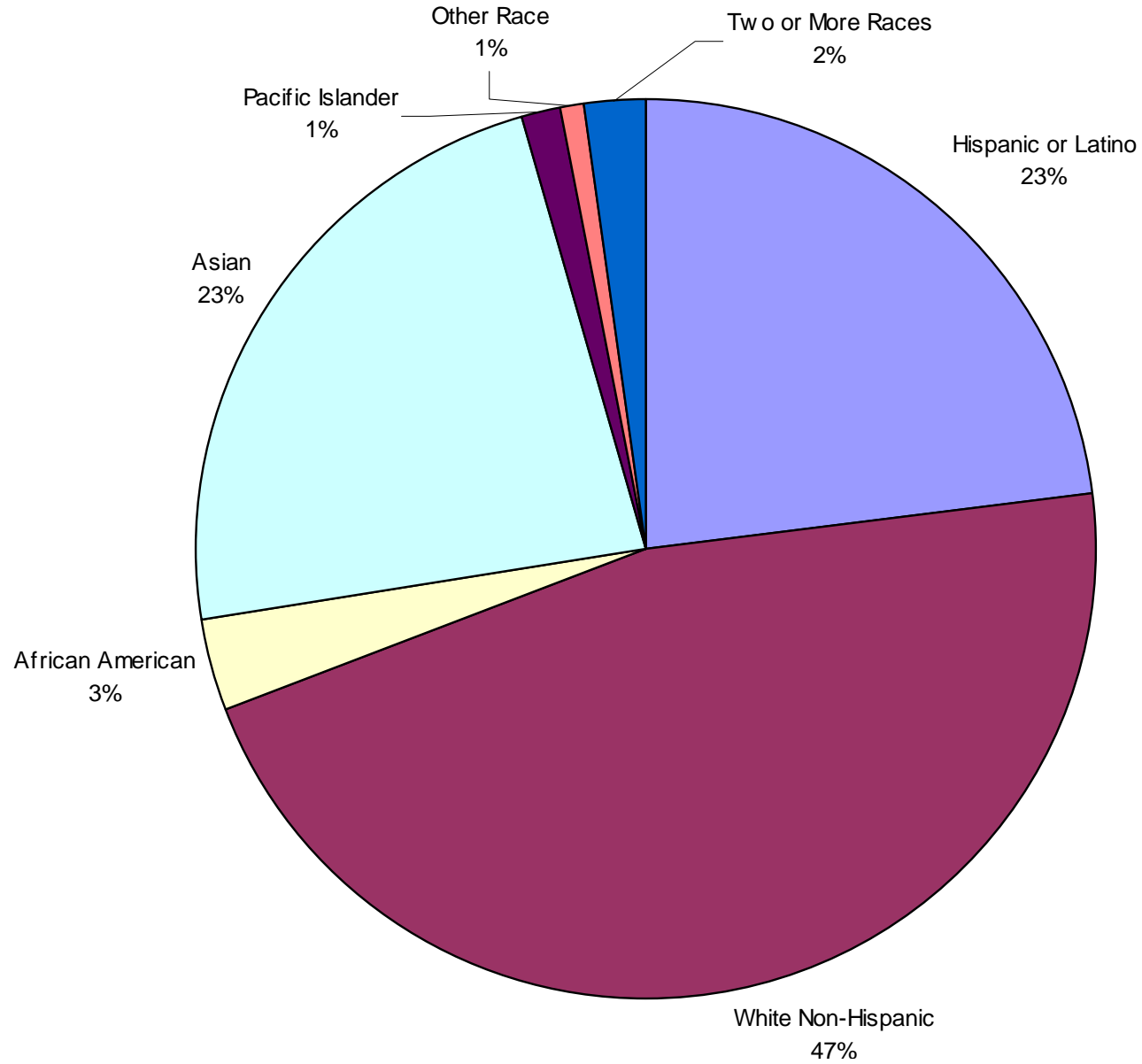
- Core function: employment training, placement and support services for job seekers
- Additional goals:
 - Economic growth through skill upgrading
 - Labor market efficiency and lower social service costs, through reducing search time
 - Promoting improved economy through anticipating future employment needs
- Achieving additional goals requires broad strategic approach, involving multiple stakeholders, and informed by solid research
- Goal of this report is to contribute to that strategy development, through initial analysis of labor market data



Demographics

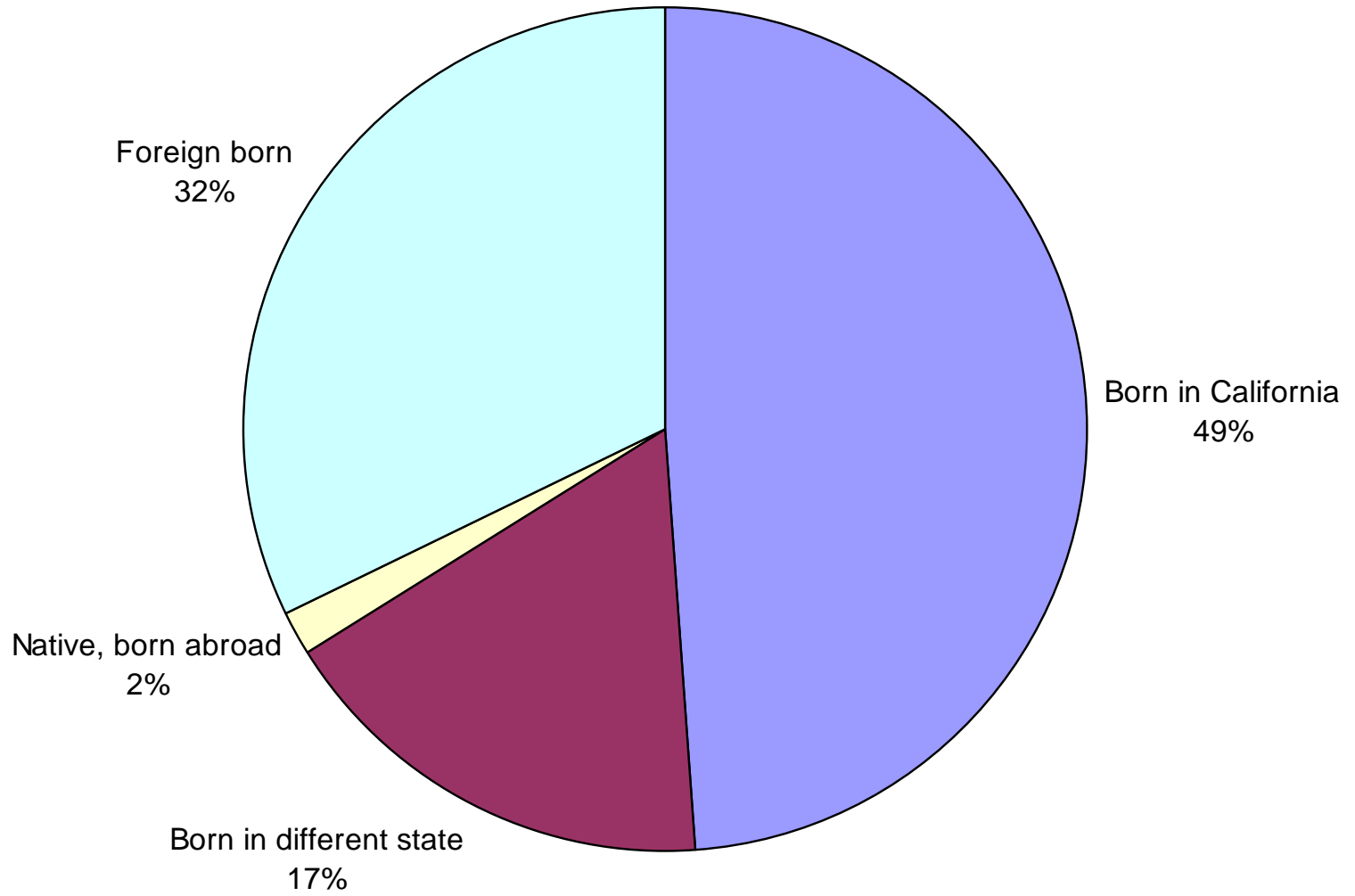


San Mateo County Population by Race, 2006

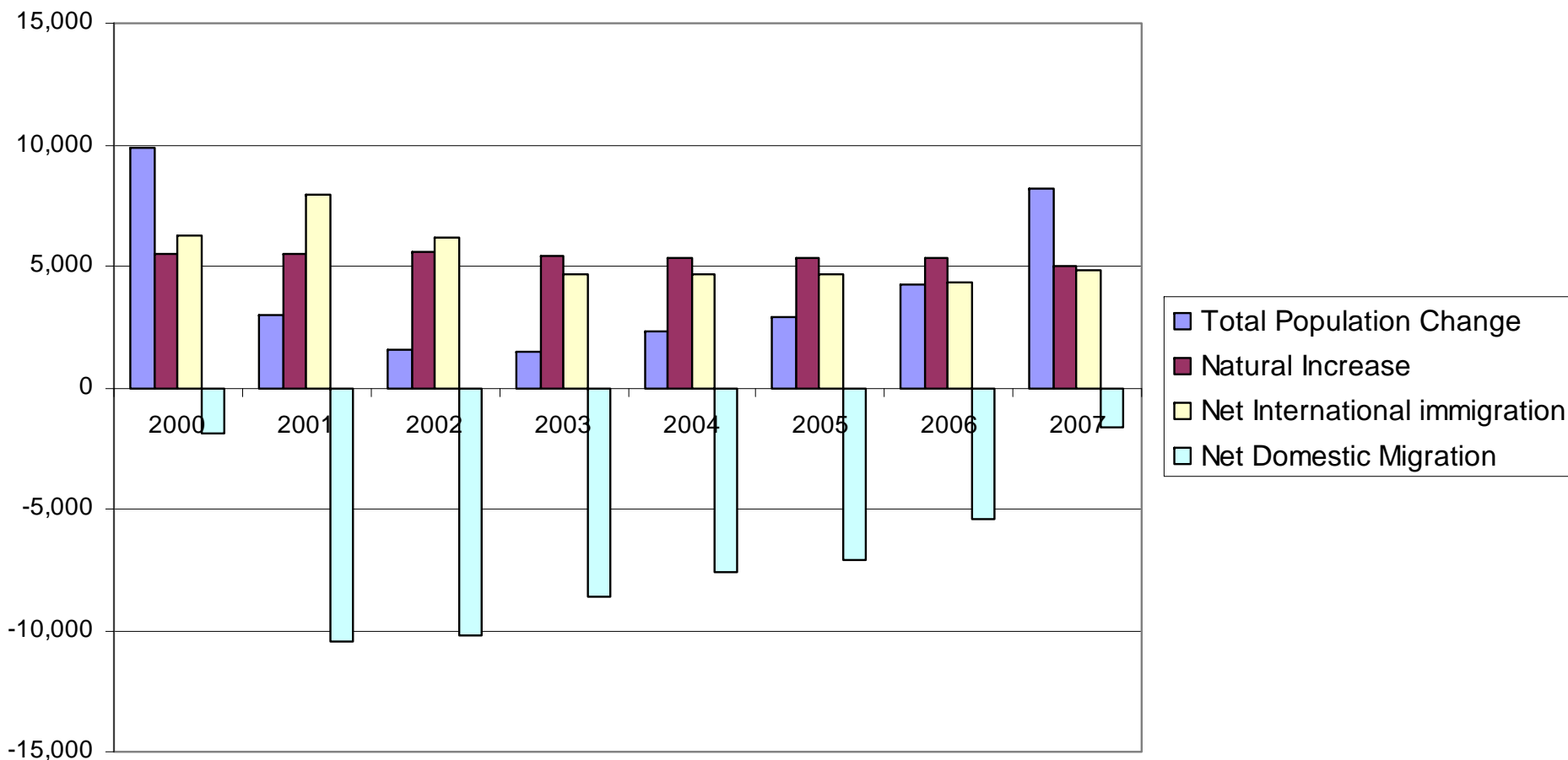




Place of Birth

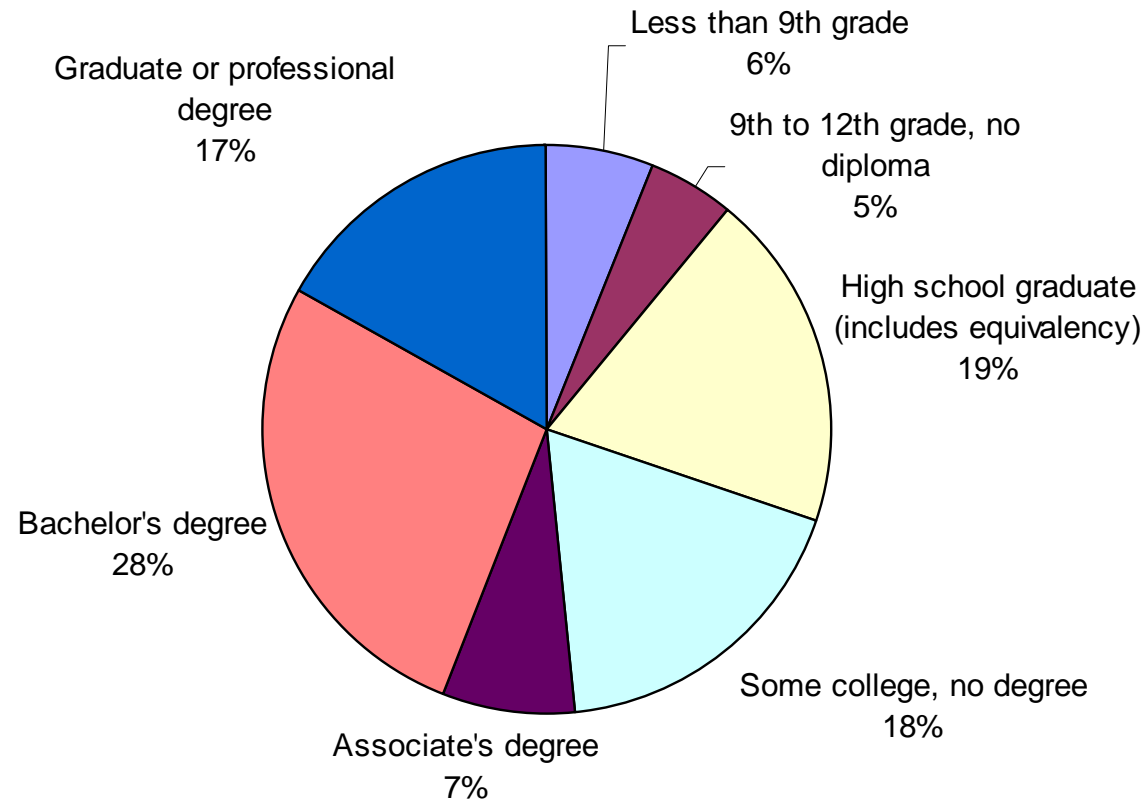


Population Change from Previous Year, San Mateo County 2000-2007

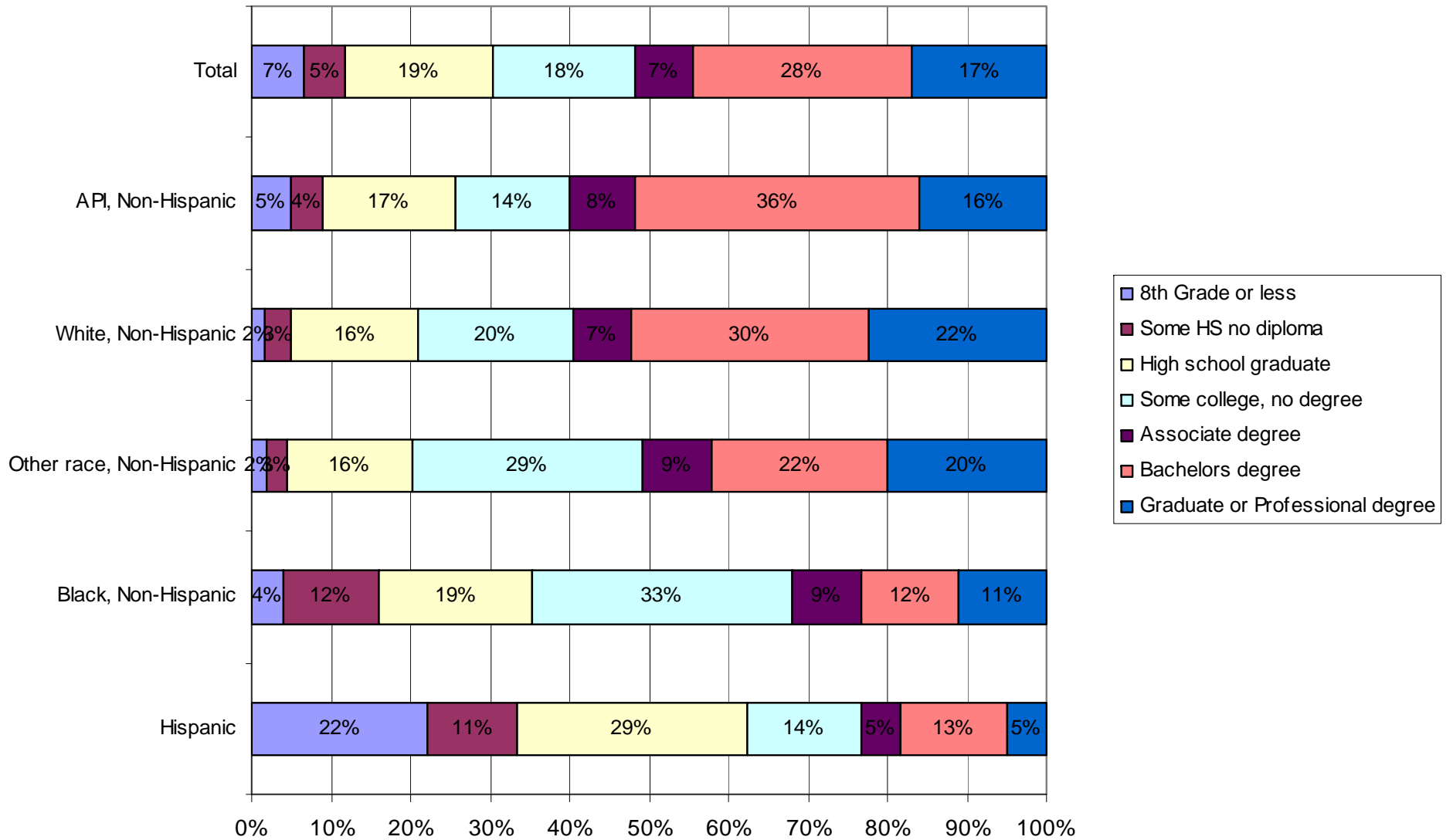


Source: CA Dept. of Finance, Demographic Research Unit

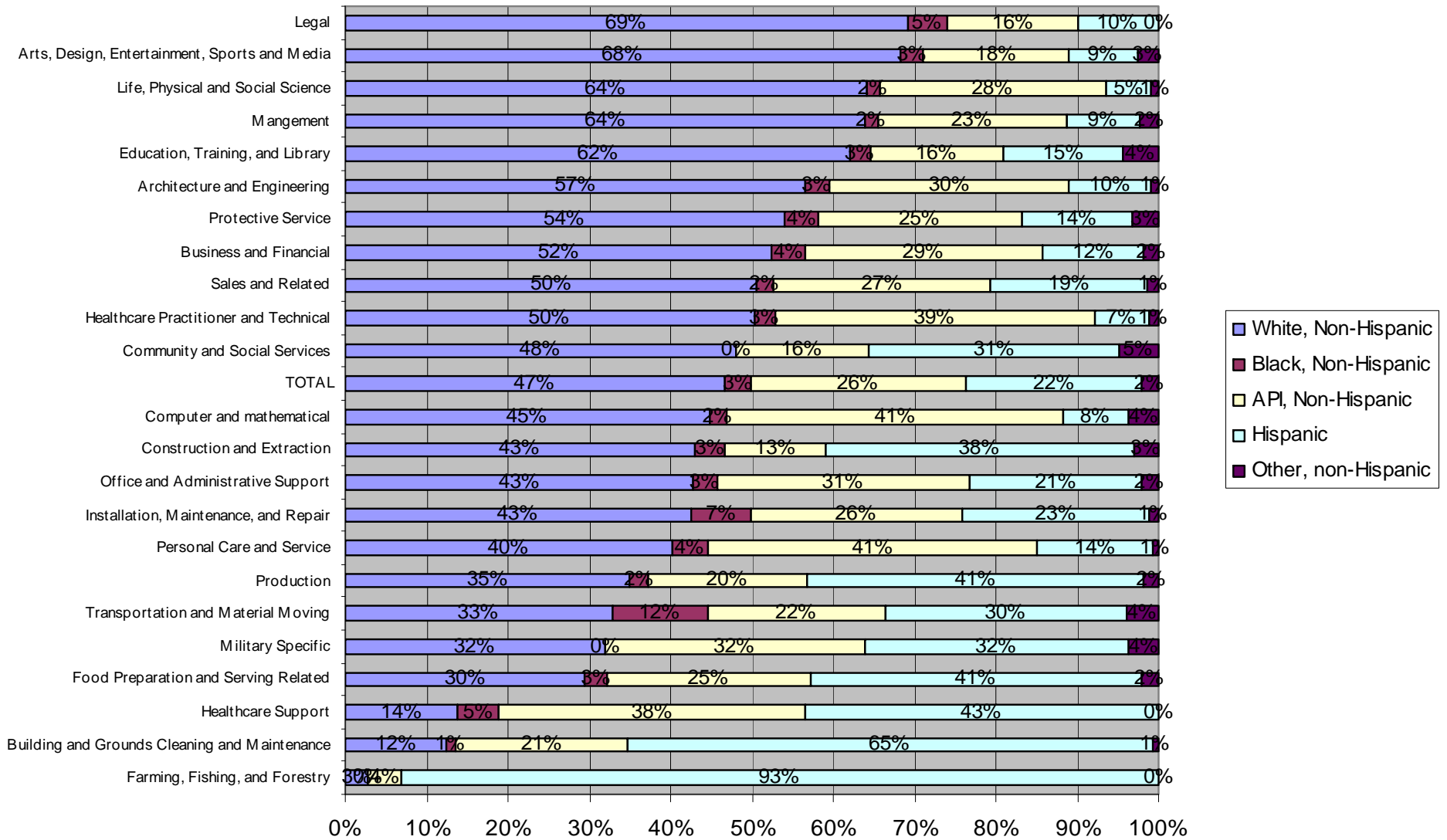
Educational Attainment, Population 25+



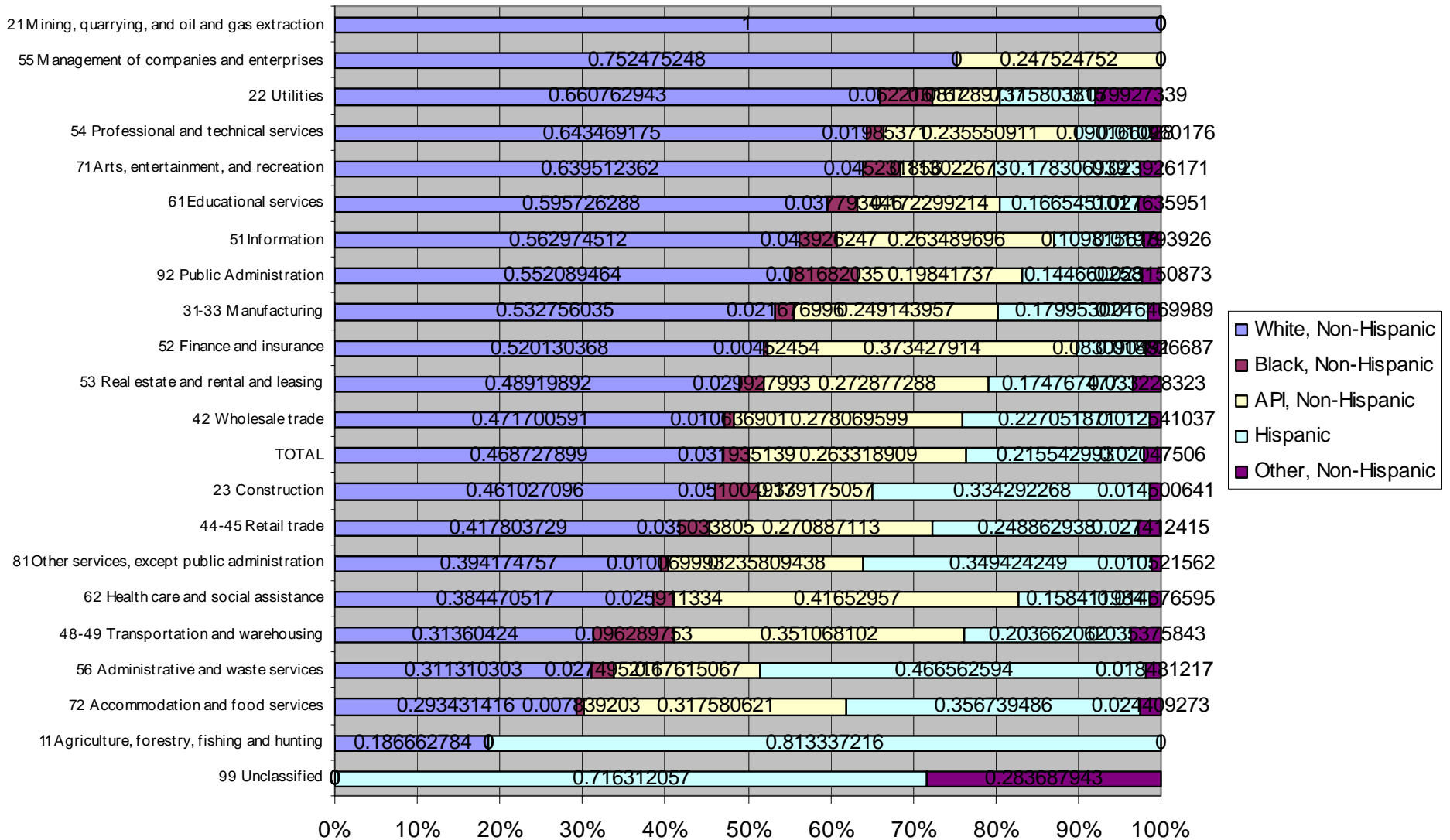
Educational Attainment by Race, 2006, Population 25+



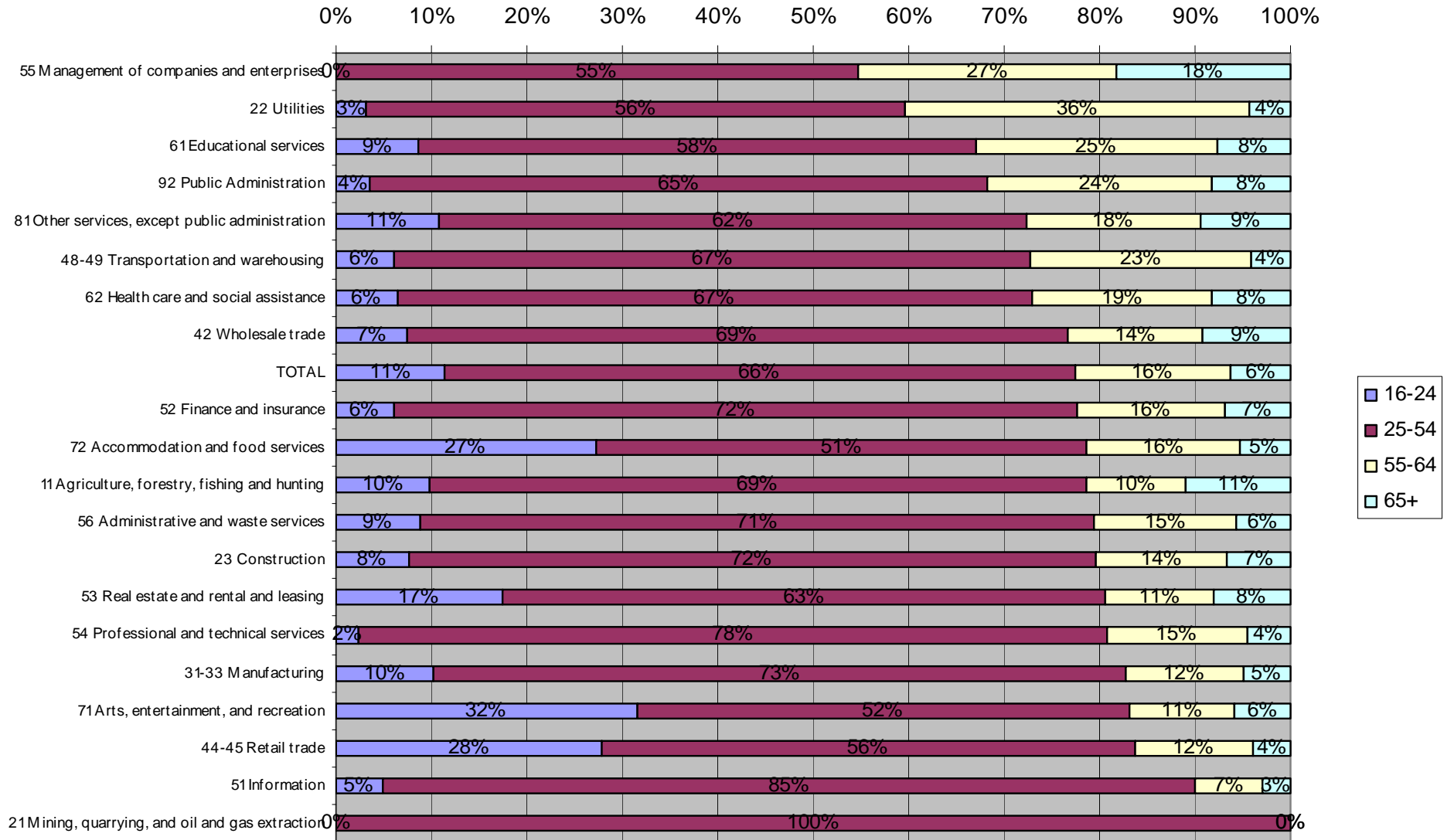
Employment in Occupational Category by Race, 2006



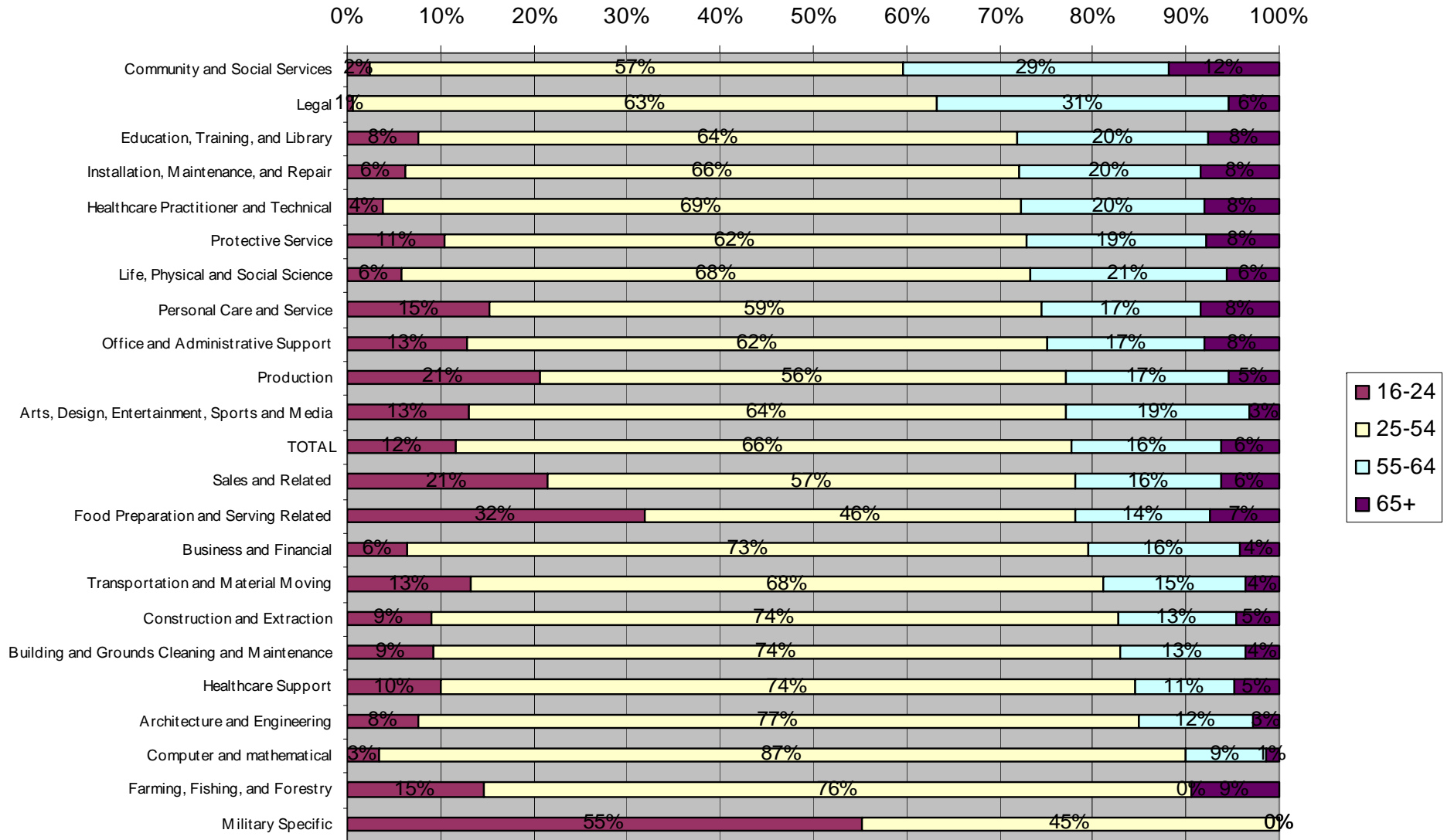
Industry Employment by Race, 2006



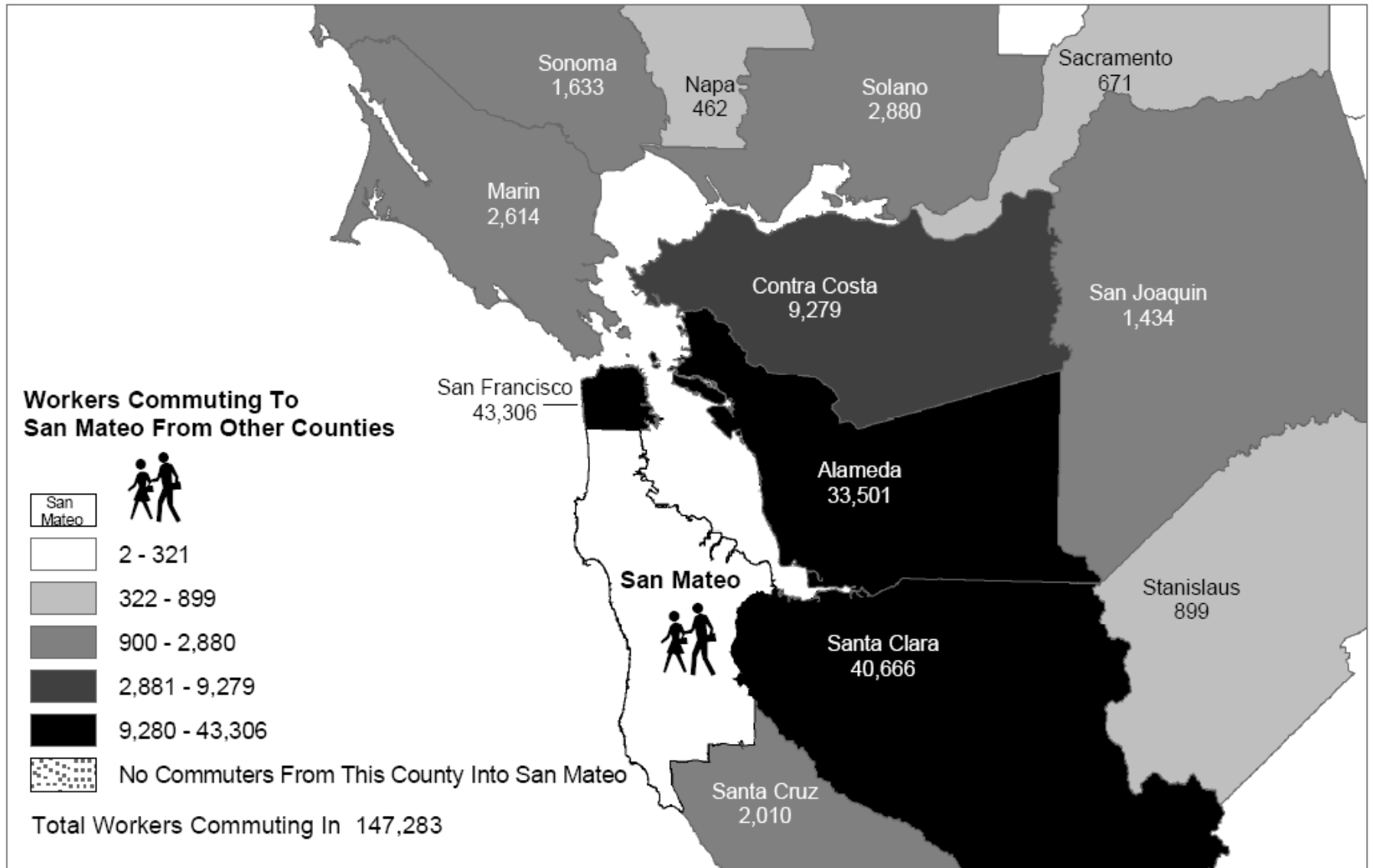
Employment in Industry Category by Age, 2006

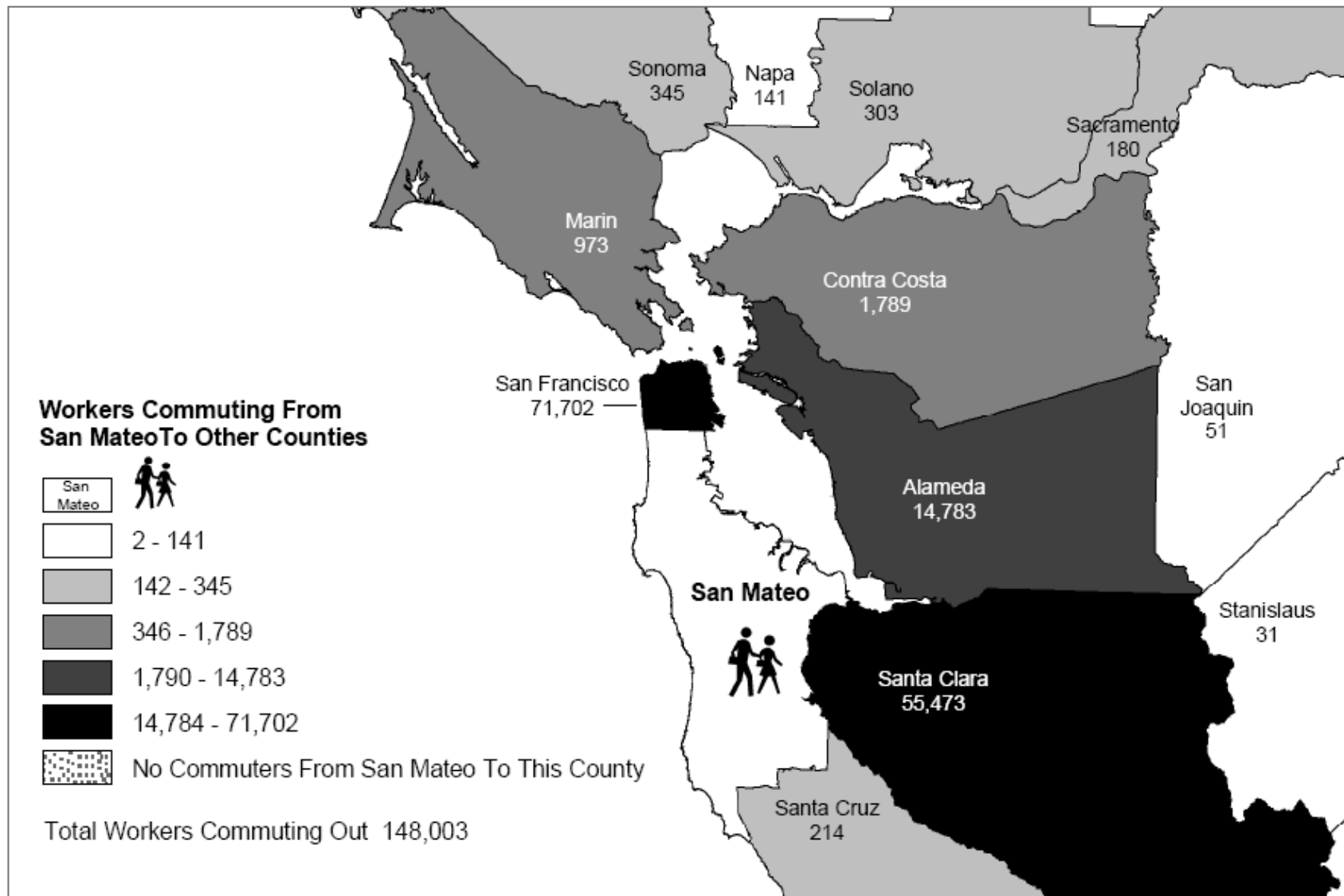


Employment in Occupational Category by Age



San Mateo County to County Commuting

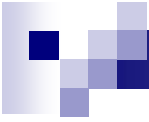




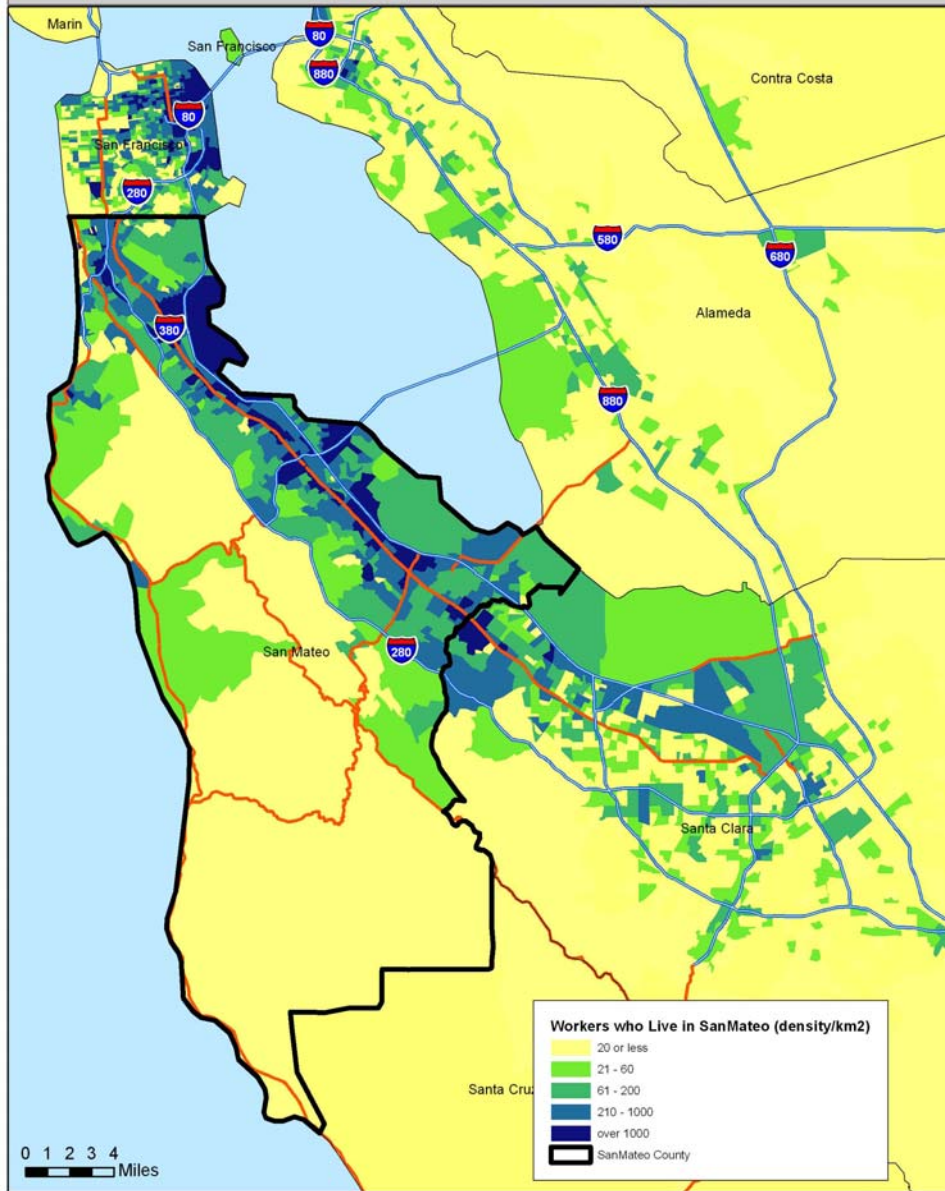
Total Workers That Live And Work In San Mateo 206,093

Data Source: U.S. Census 2000

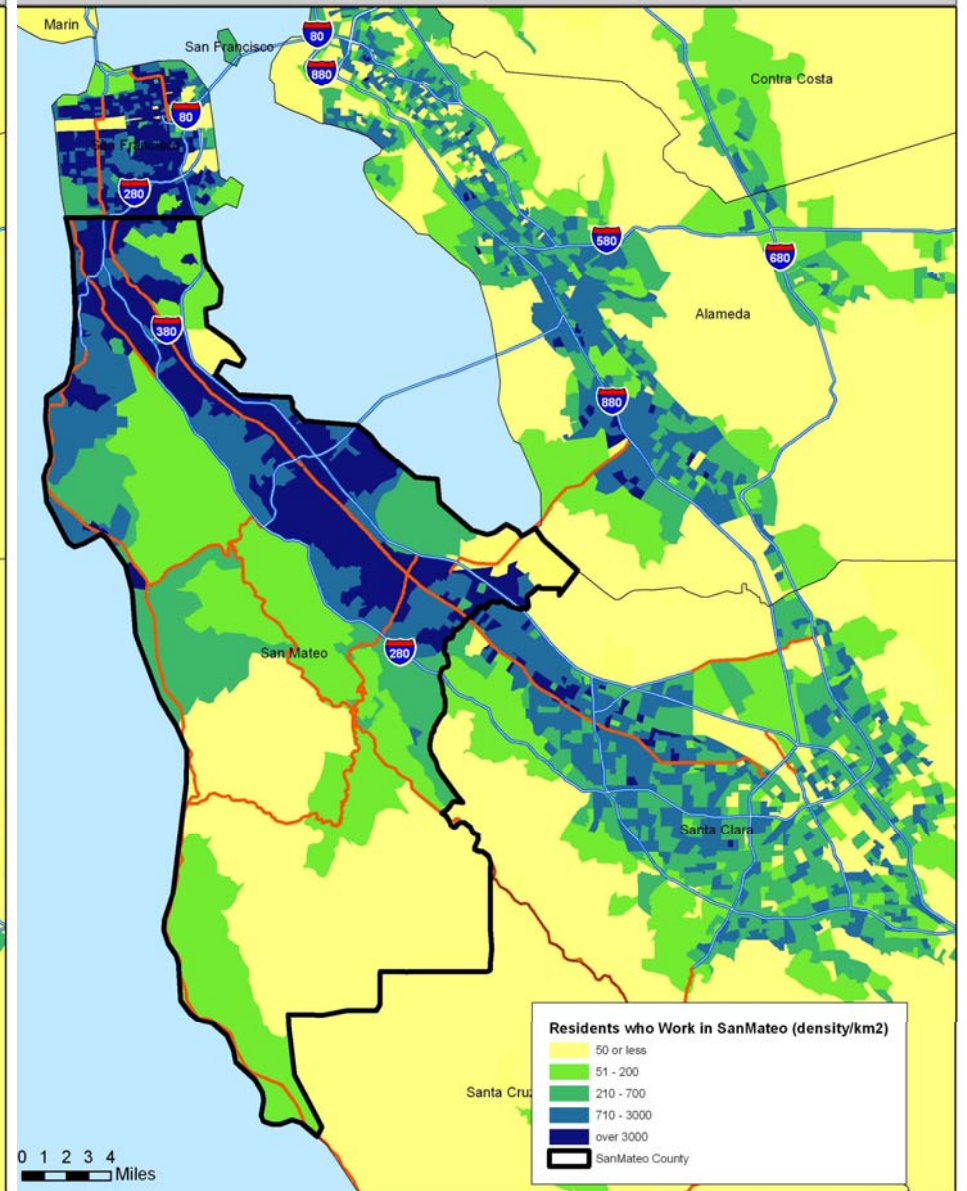
Cartography by
 Current Economic Statistics Group
 Labor Market Information Division
 California Employment Development Department
www.labormarketinfo.edd.ca.gov



Place of Work of SanMateo Residents



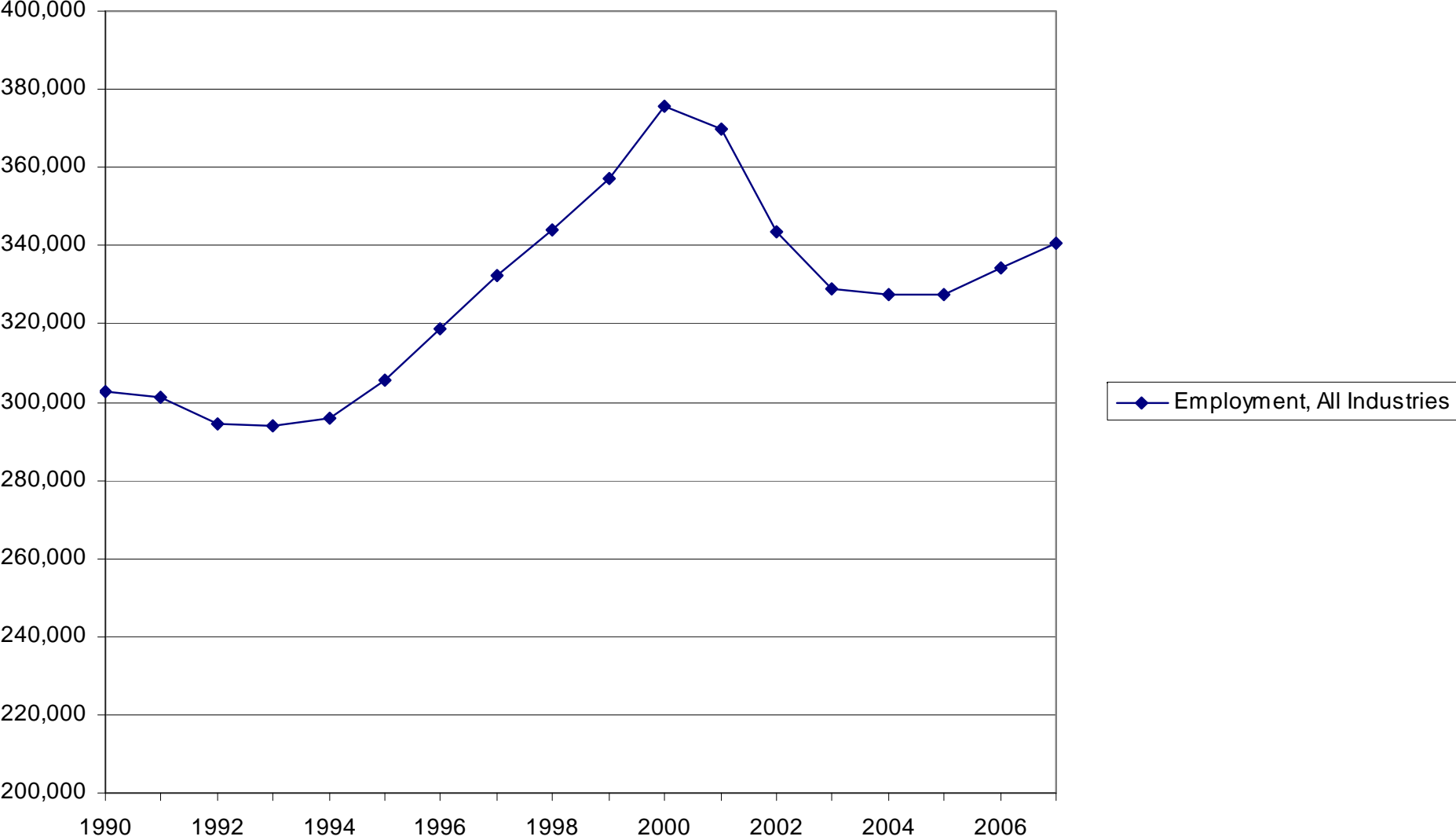
Place of Residence of SanMateo Workers





Overall employment structure and dynamics

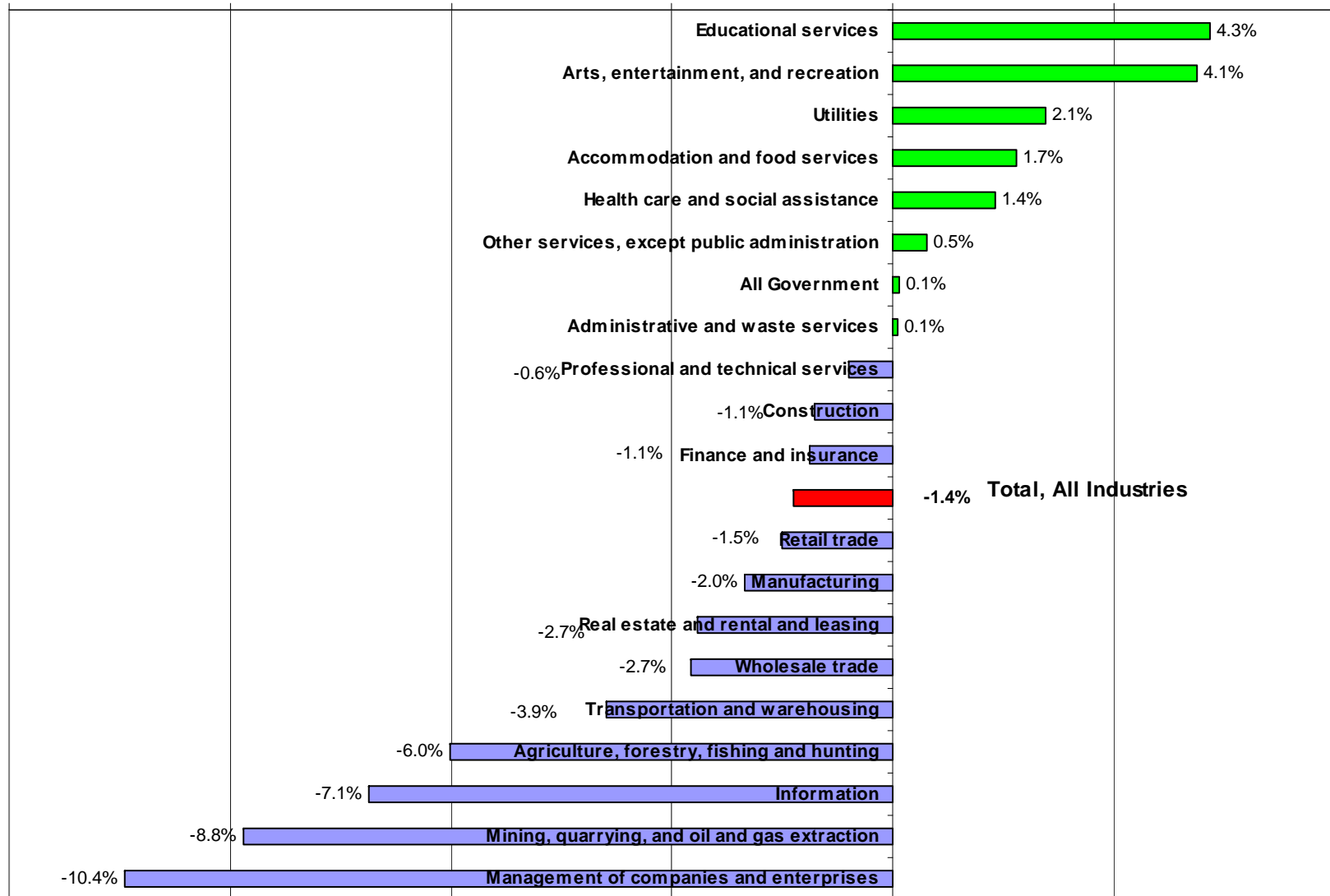
Employment, All Industries, San Mateo County, 1990-2007



Employment Change 2001-2007

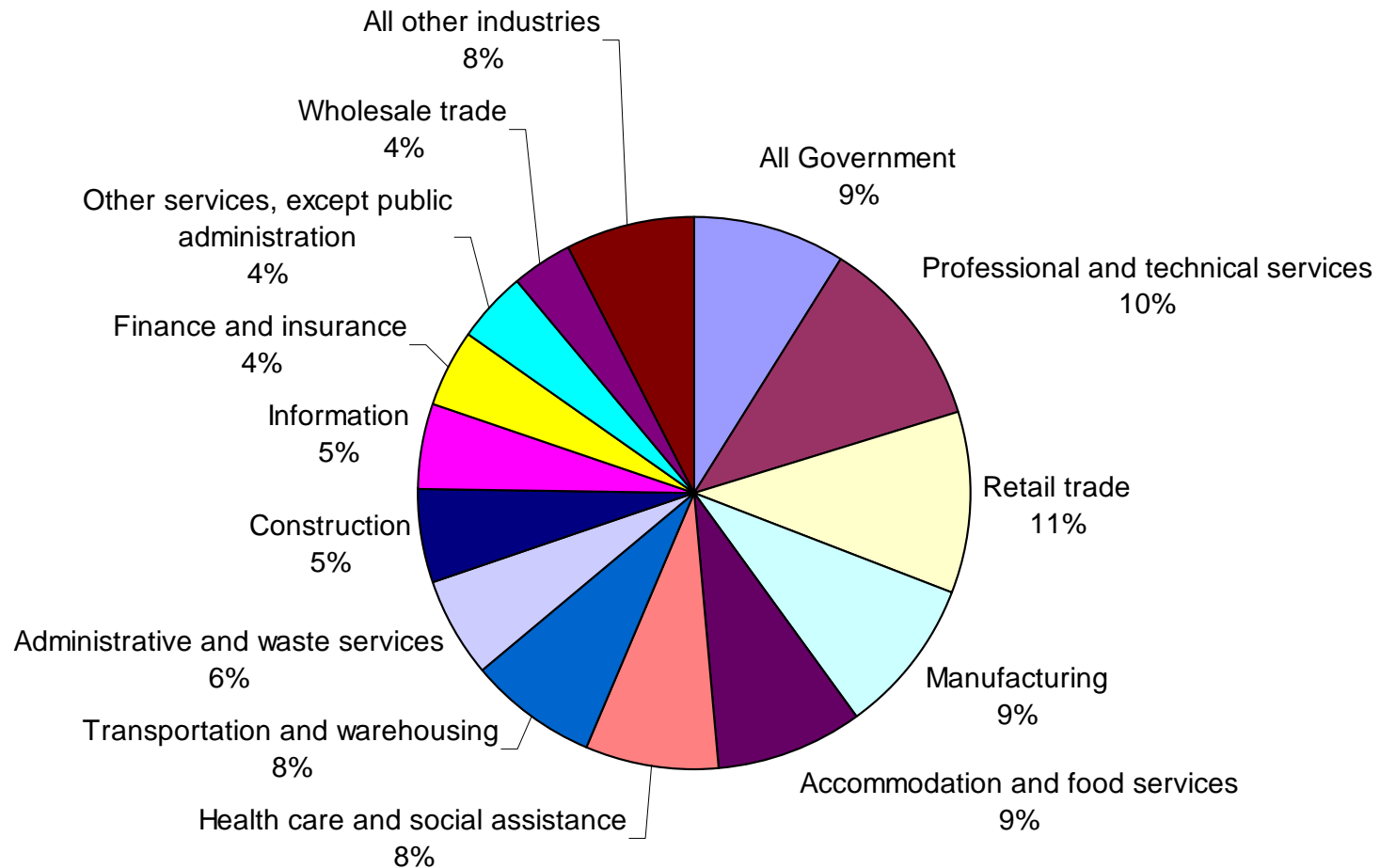
Annual Average Growth Rate

-12.0% -9.0% -6.0% -3.0% 0.0% 3.0% 6.0%



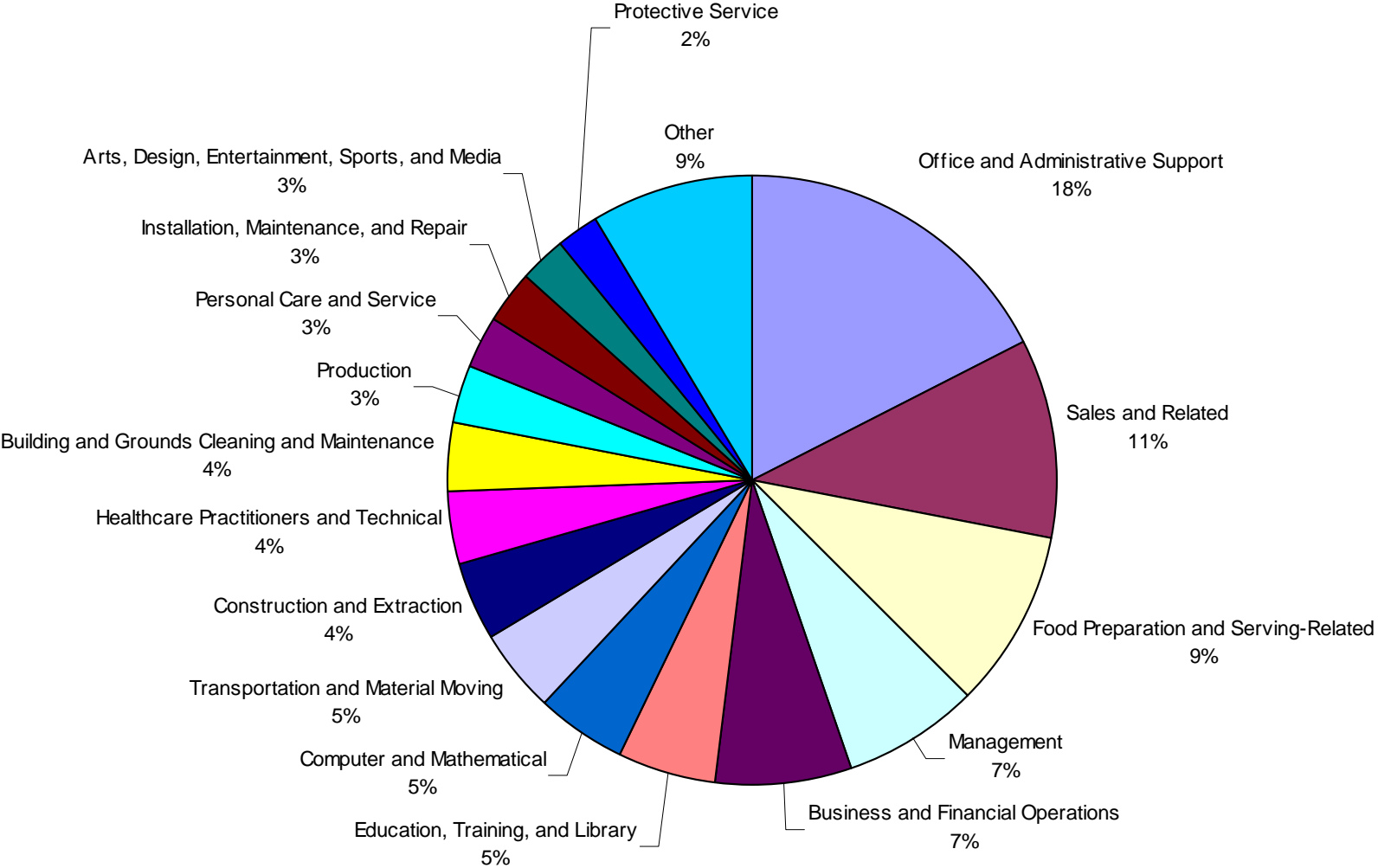


San Mateo County Employment Distribution 2007





Total employment by occupation

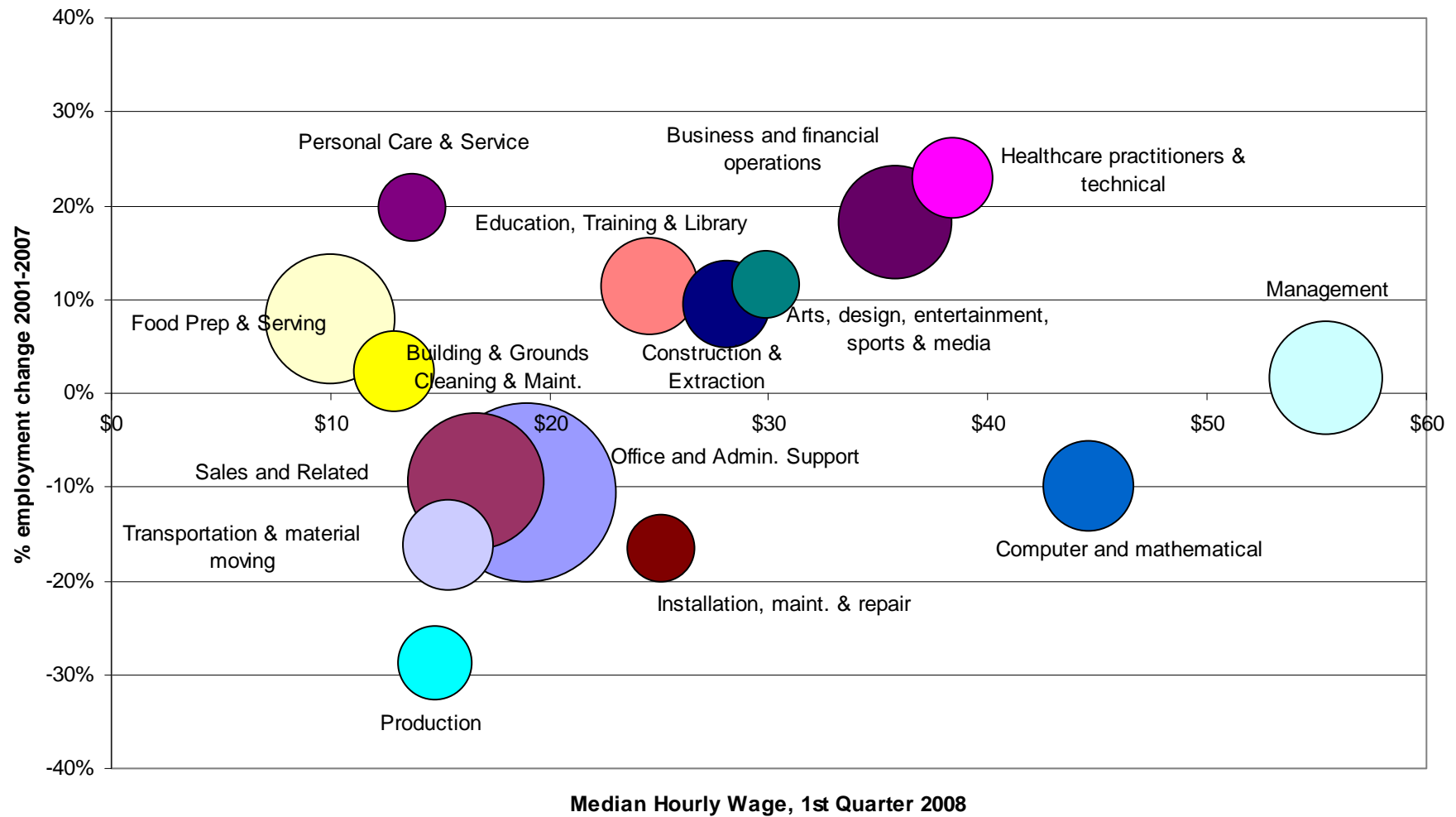




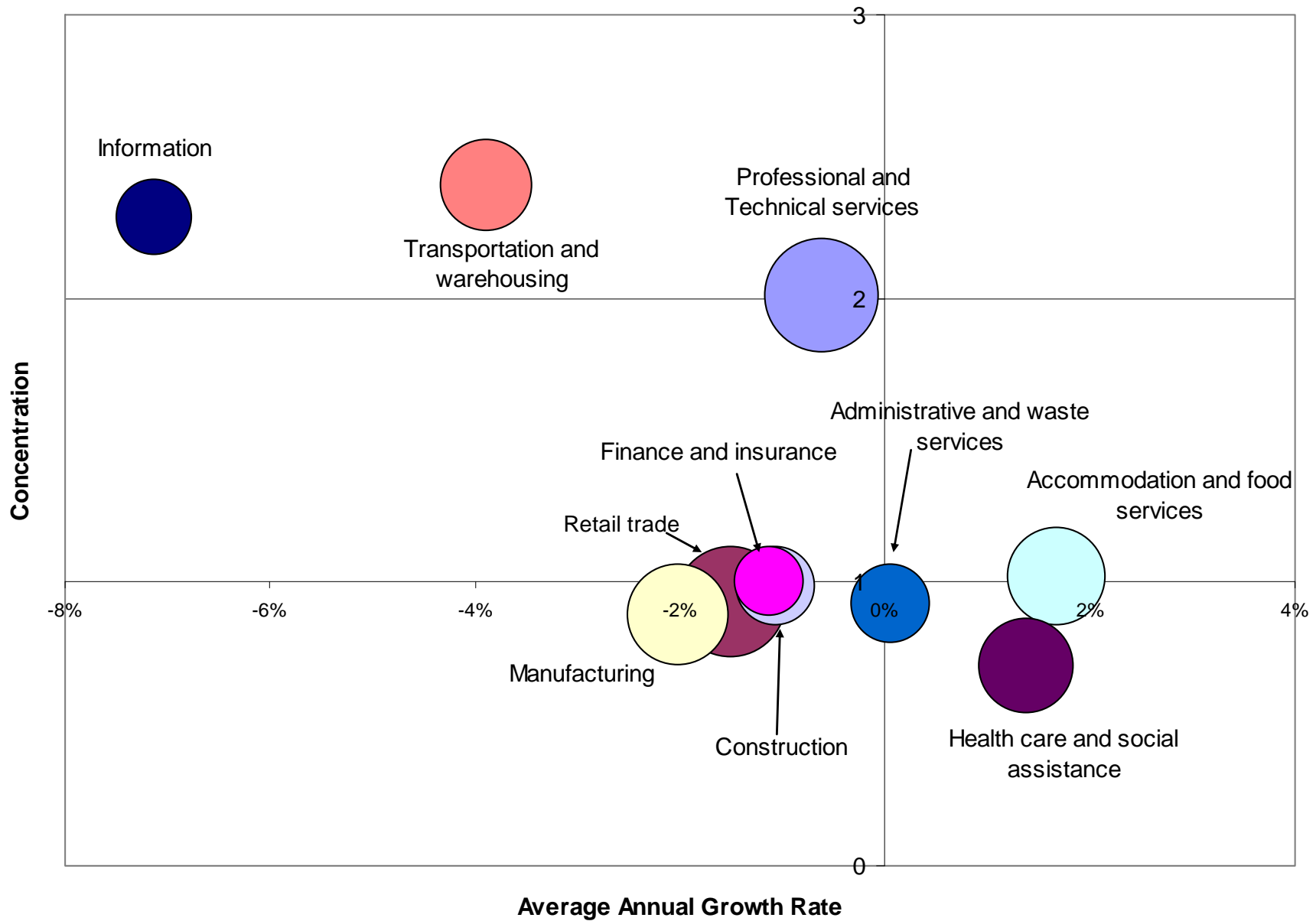
Bubble Charts

- Size of bubble always indicates total employment in that industry
- Variables along horizontal and vertical axes are always indicated
- “Concentration” is a measure of the local concentration of employment in that industry, compared to the national percentage. A value of “1” means the proportion of people employed locally in that industry is exactly the same as the national proportion. A value of “2” means twice the concentration of people. Generally, a higher concentration indicates a level of specialization and competitive advantage in that industry
- In all charts, values are oriented such that the ‘good quadrant’ is always in the upper right

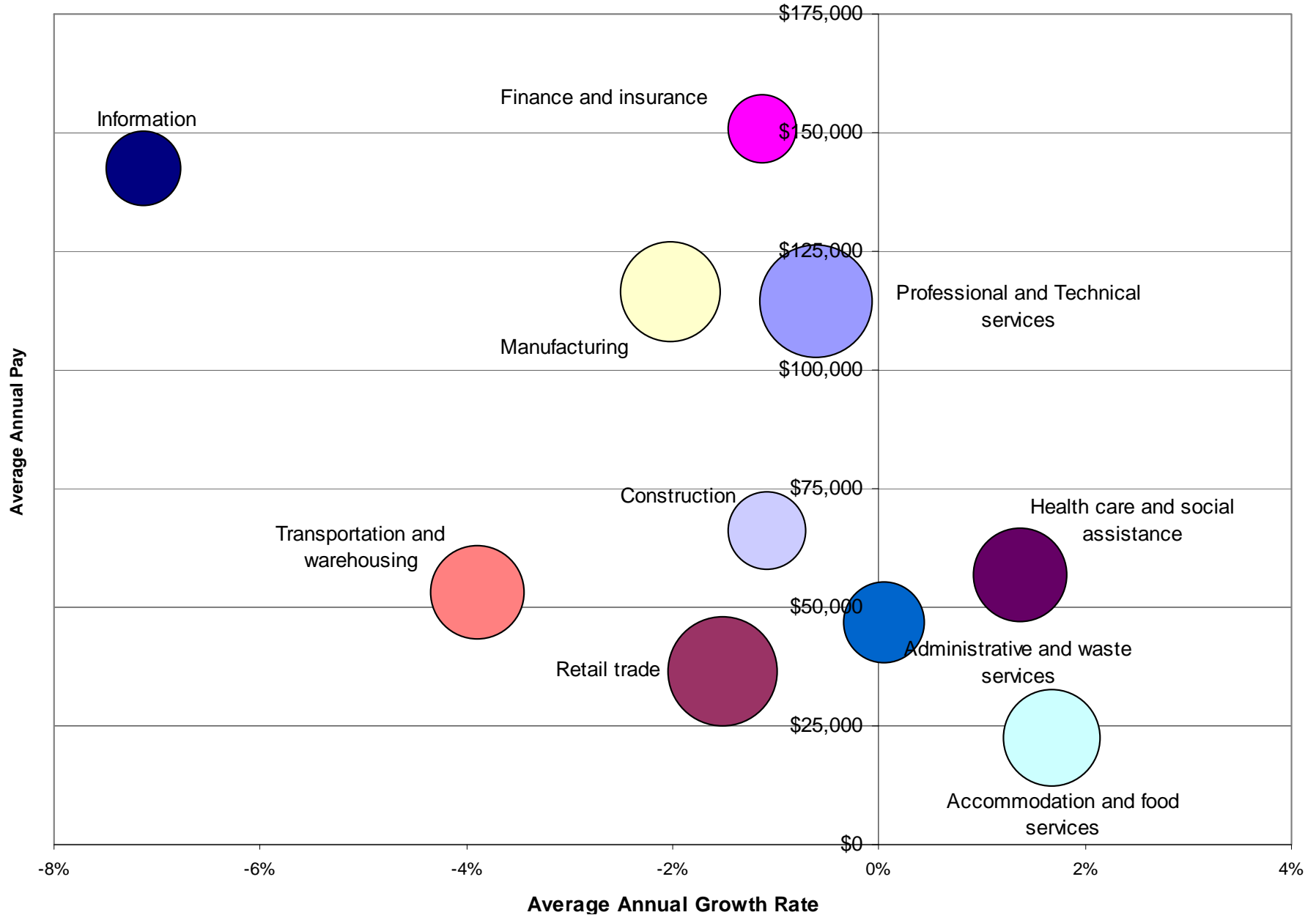
2001-2007 Employment Change and 2008 Median Hourly Wage, by Occupational Category



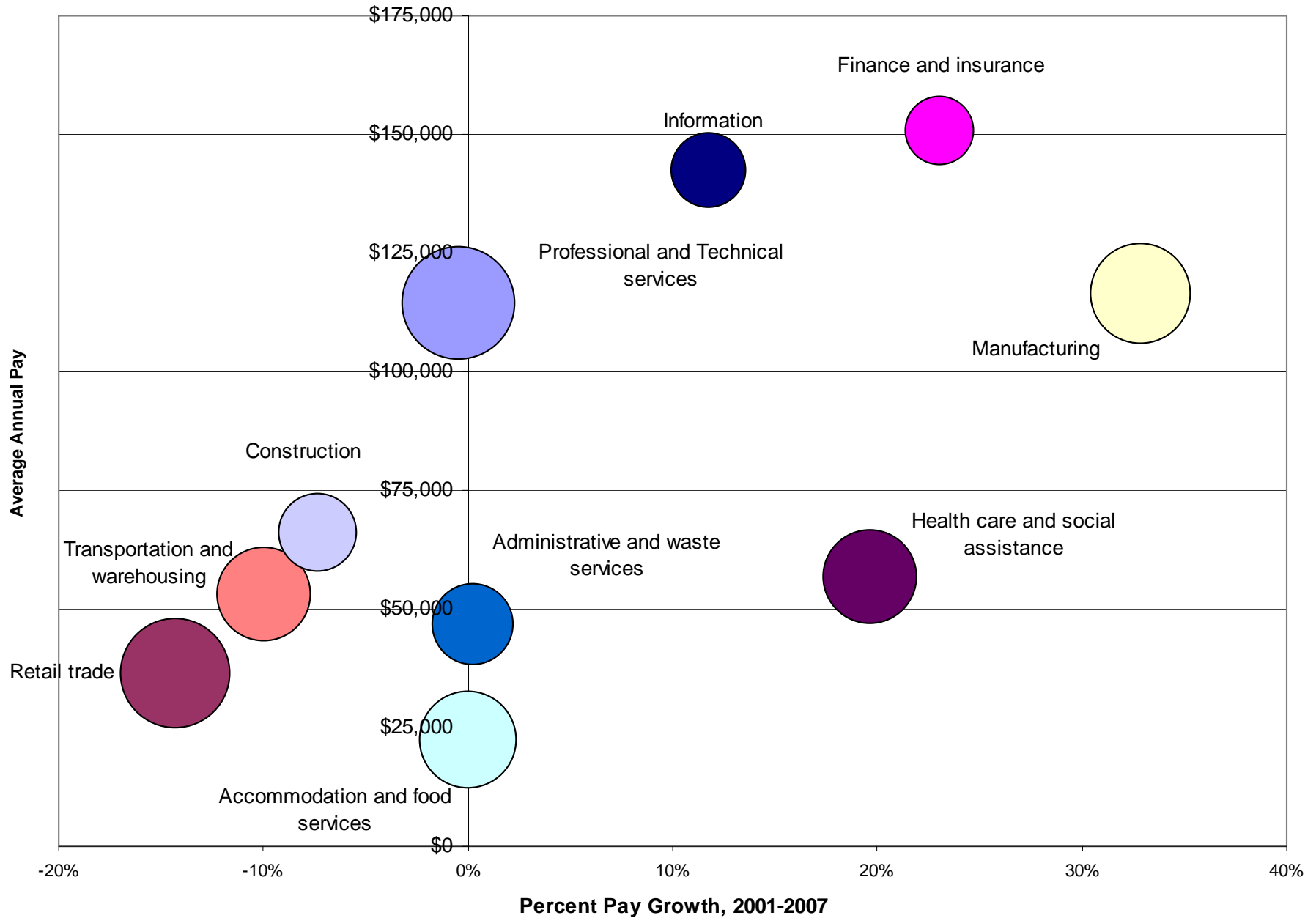
Concentration, Size, and Growth, 10 Largest Private Industries



Average Annual Pay, Size, and Growth, 10 Largest Private Industries



Pay Growth, Size, and Average Pay, 10 Largest Private Industries

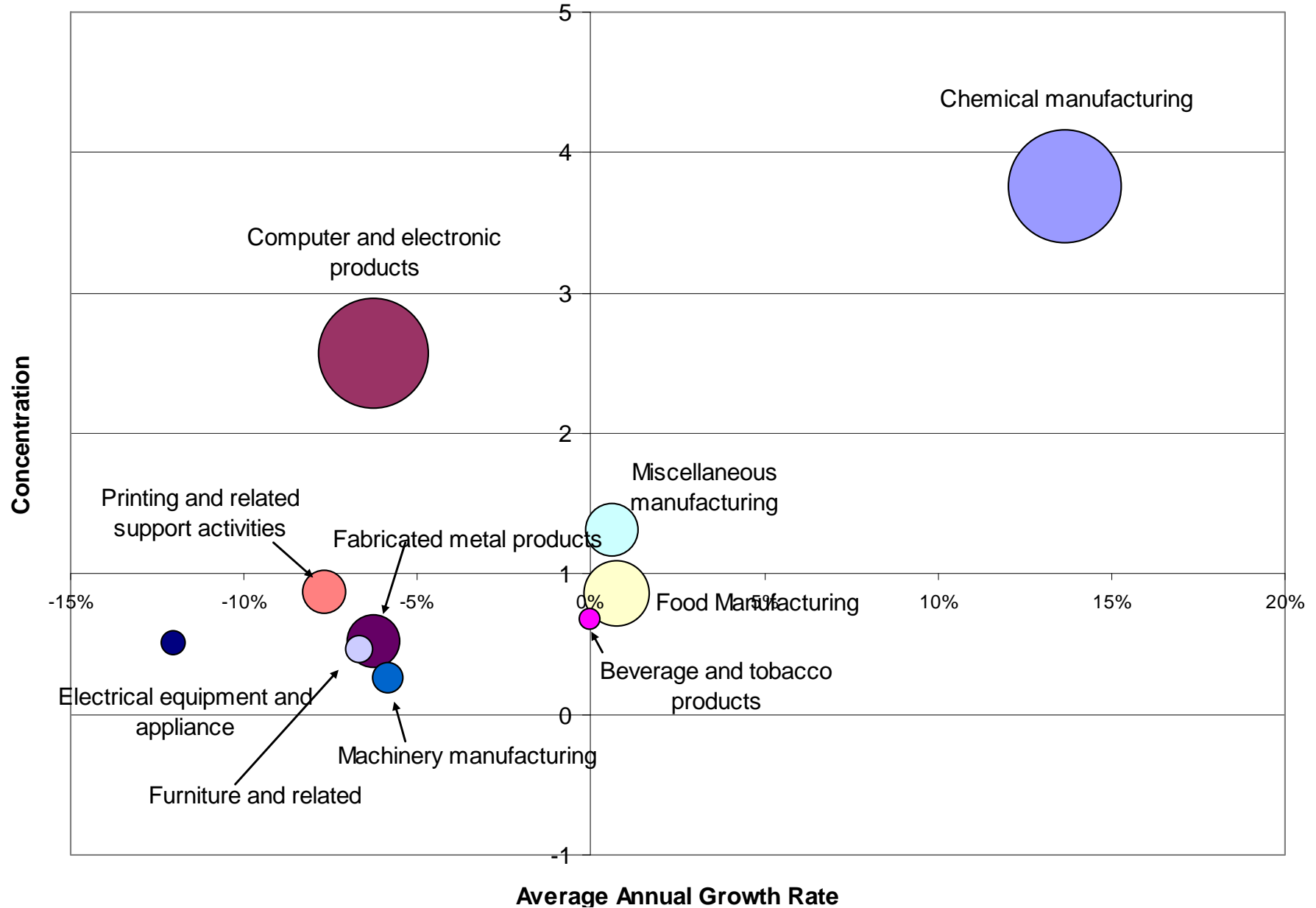




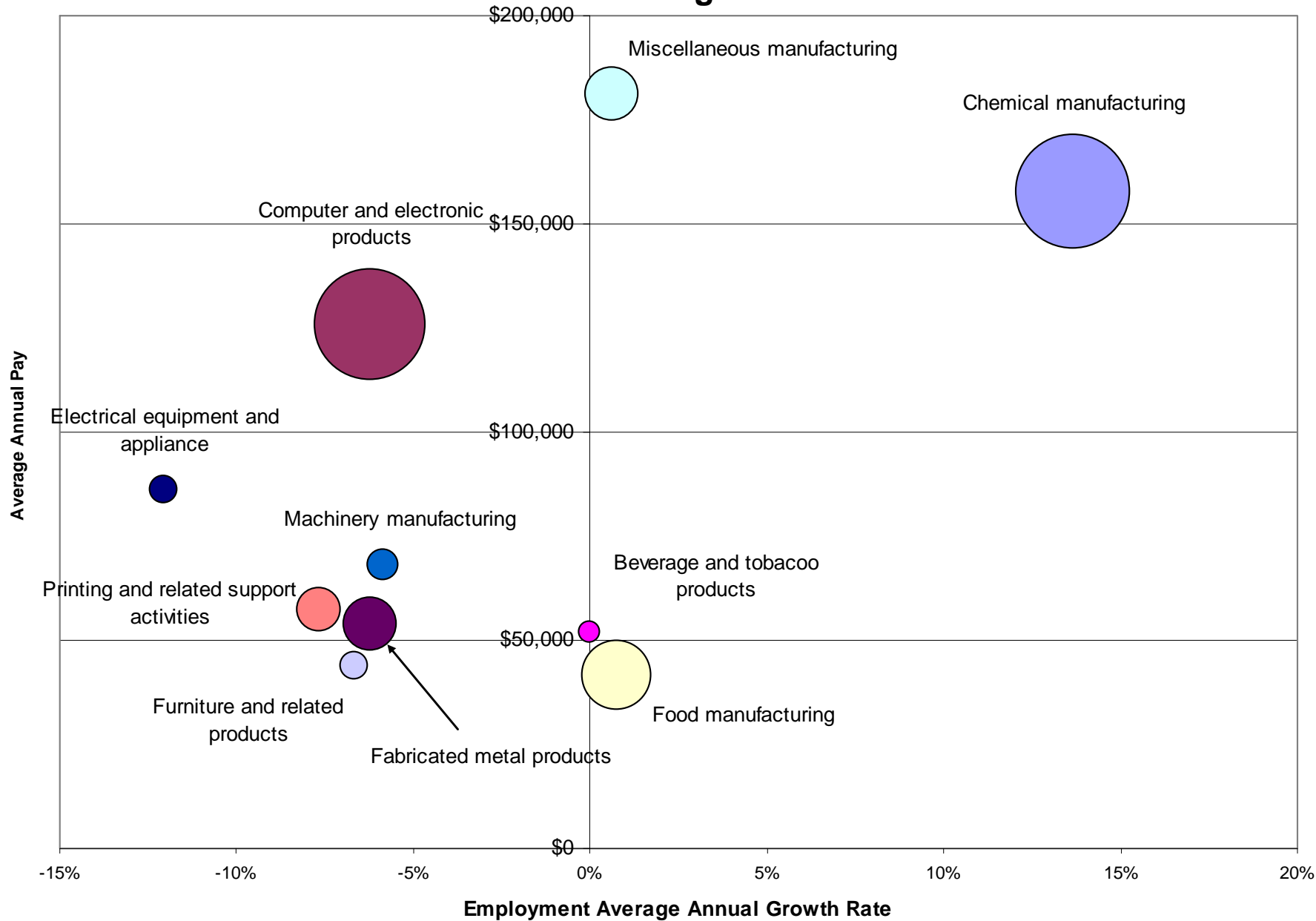
Analysis of sub- sectors

Manufacturing

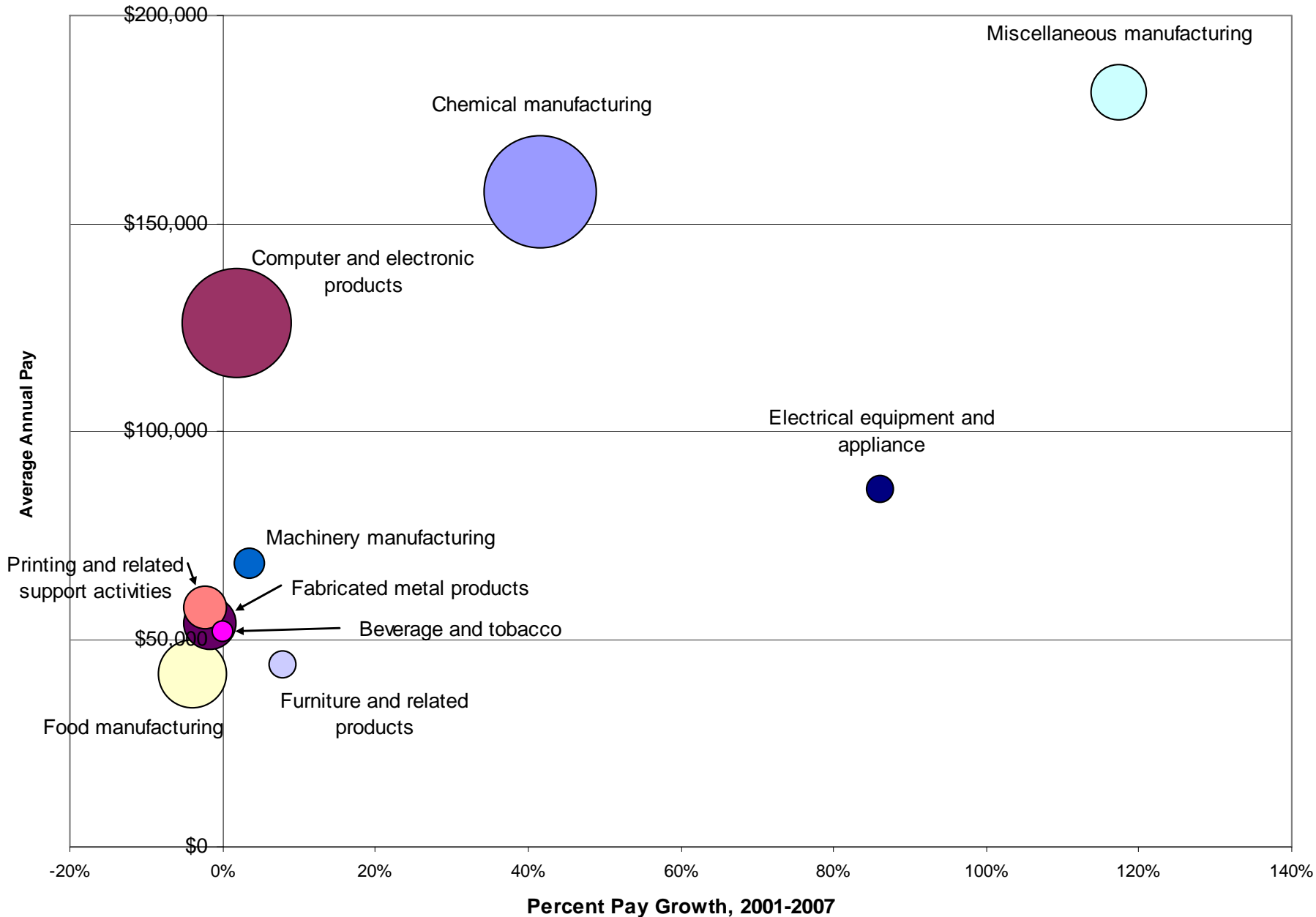
Concentration, Size, and Growth, 10 Largest Private Manufacturing Industries



Average Annual Pay, Size, and Growth, 10 Largest Private Manufacturing Industries



Average Annual Pay, Size, and Pay Growth, 10 Largest Private Industries

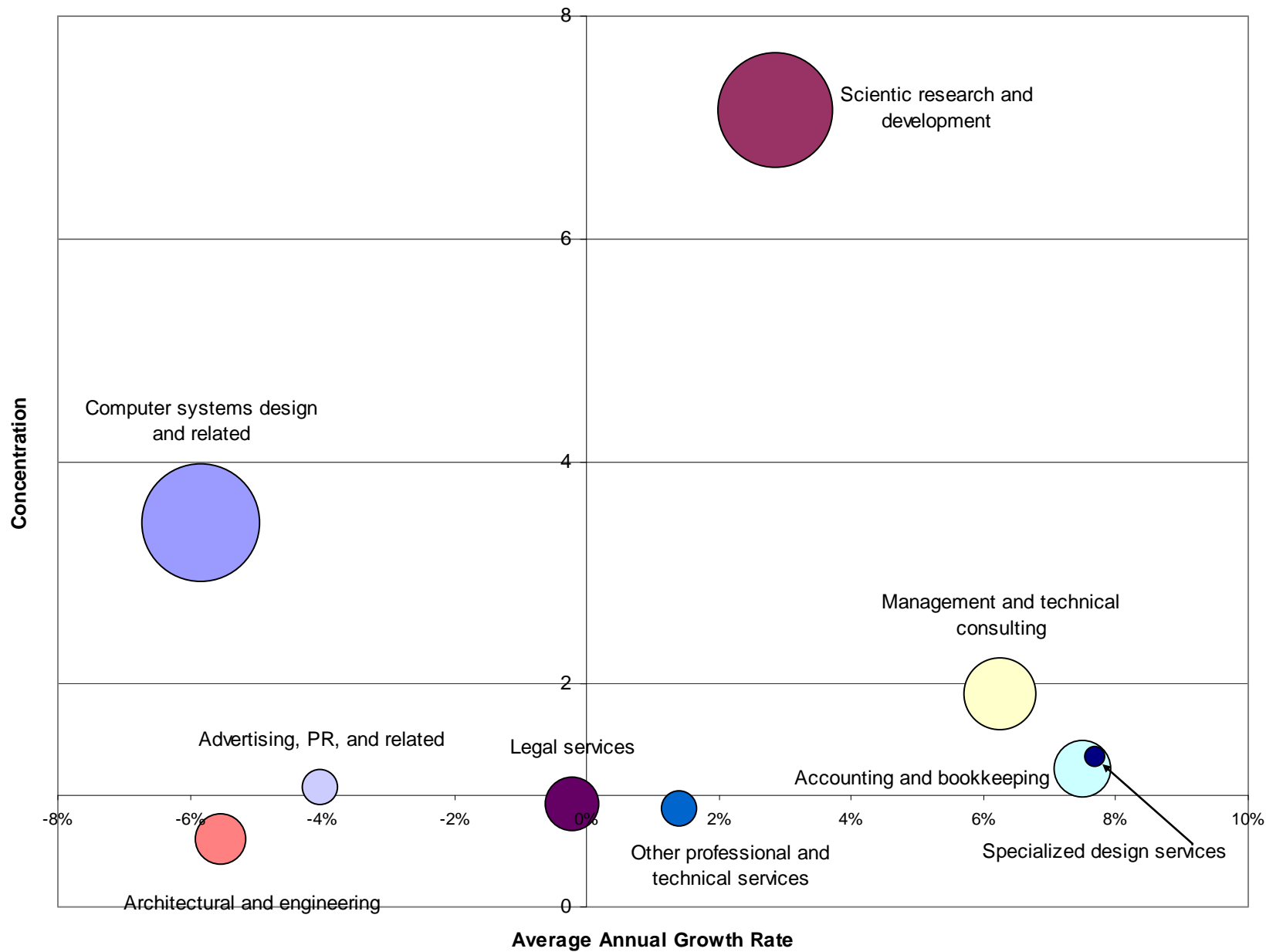




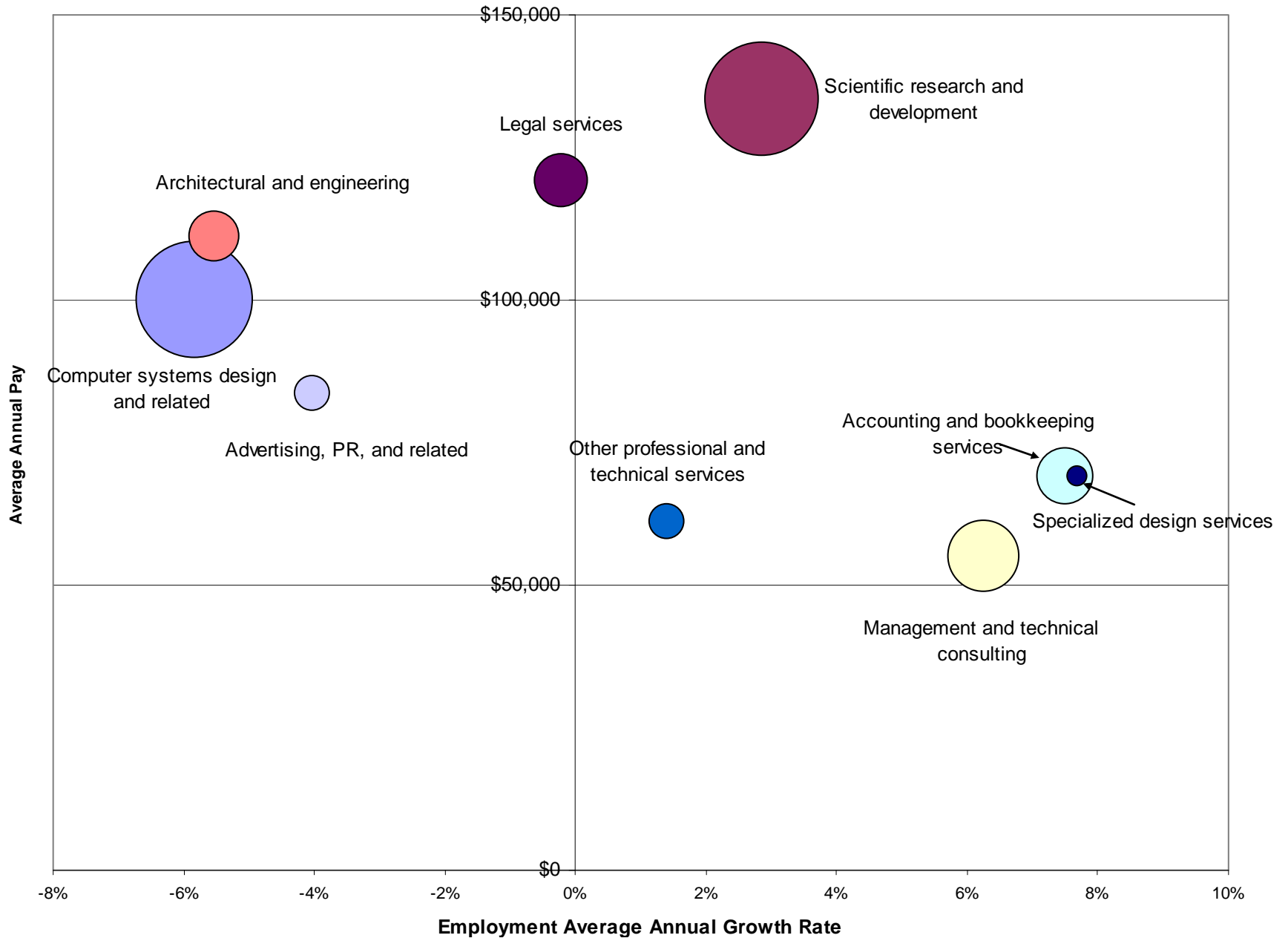
Analysis of sub- sectors

Professional and Technical
Services

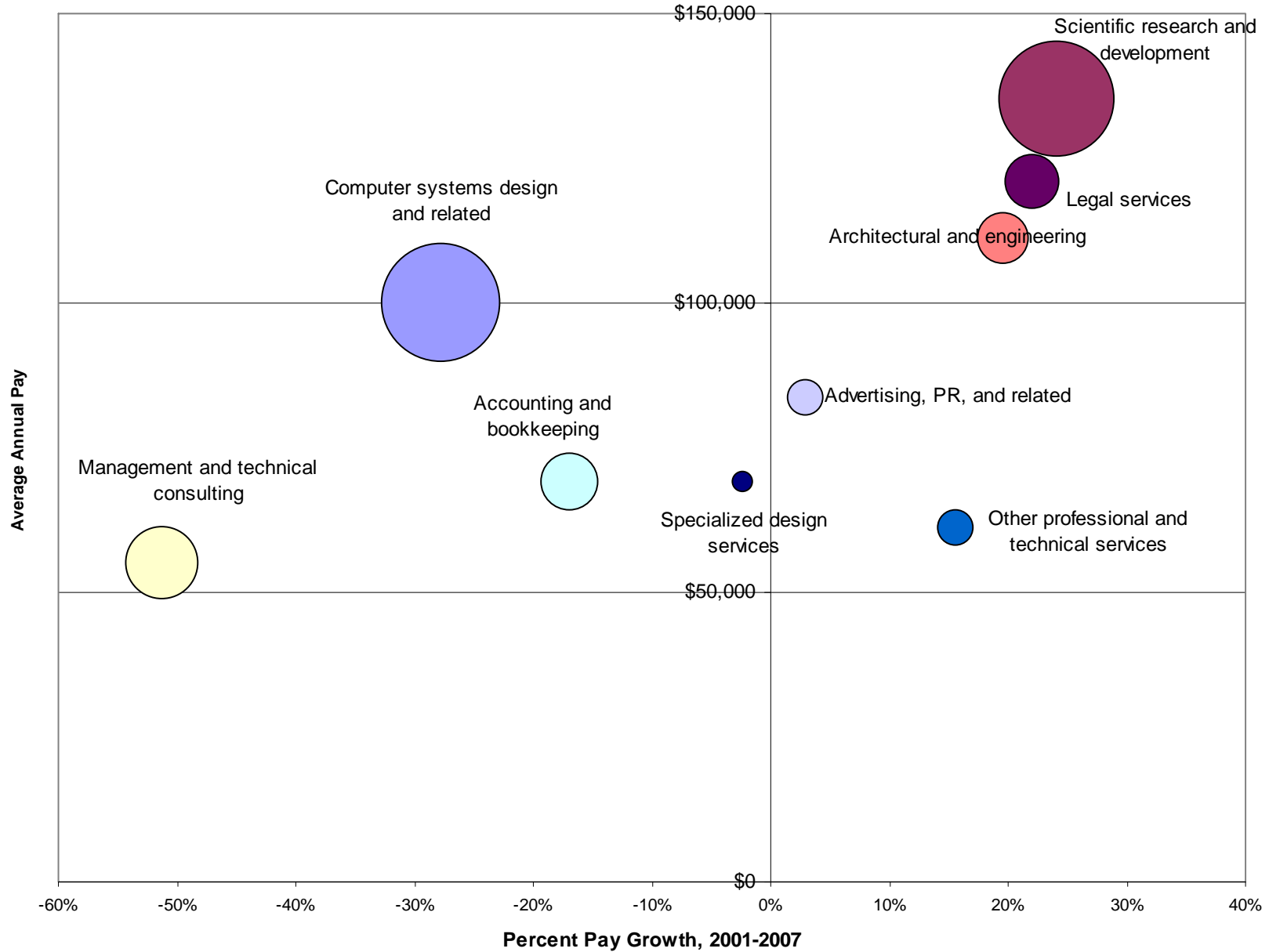
Concentration, Size, and Growth, Prof & Tech. Svcs Industries



Average Annual Pay, Size, and Growth, Prof. & Tech. Svcs



Average Annual Pay, Size, and Pay Growth, Prof. & Tech. Svcs.

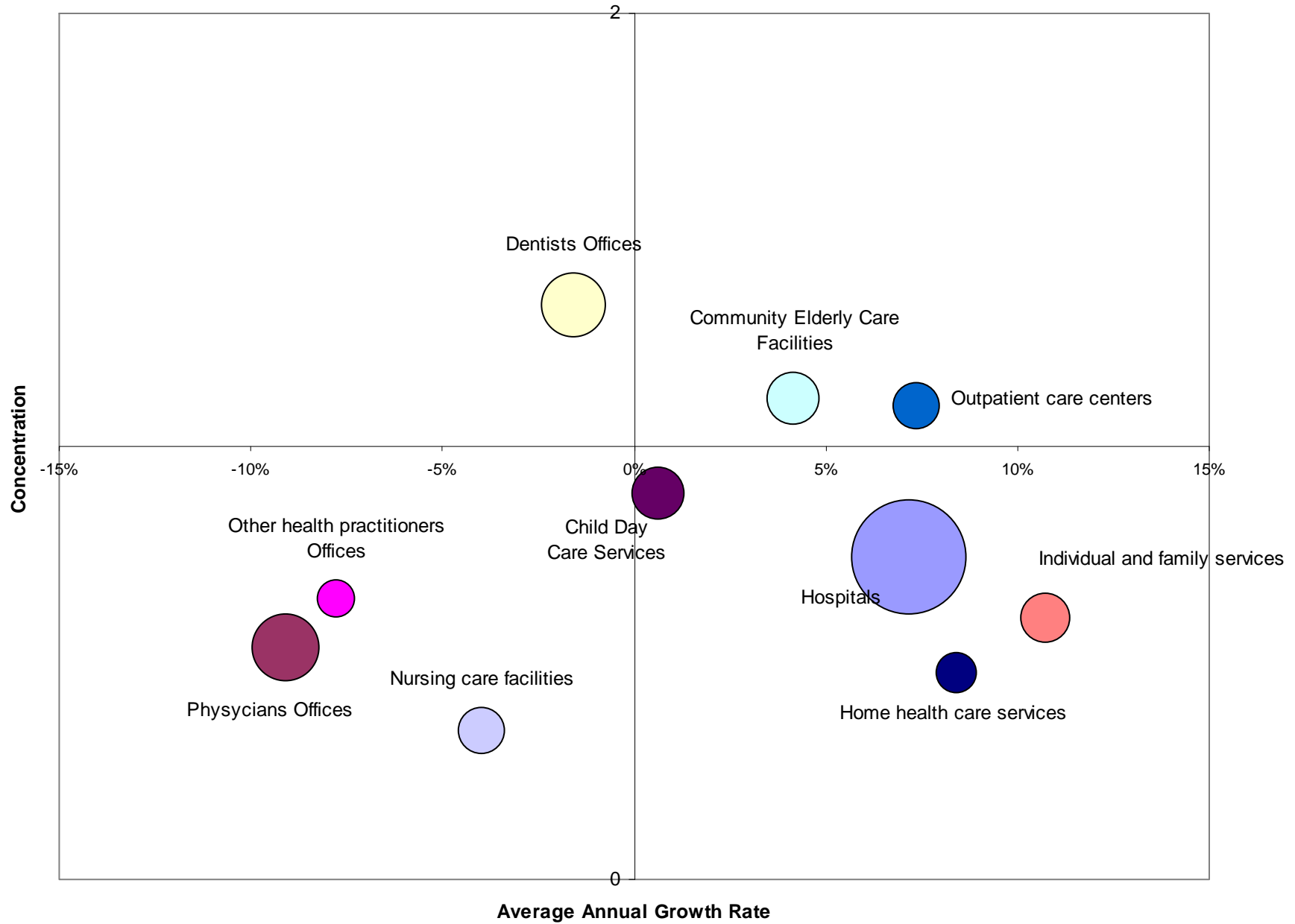


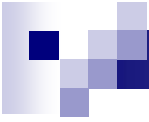


Analysis of sub- sectors

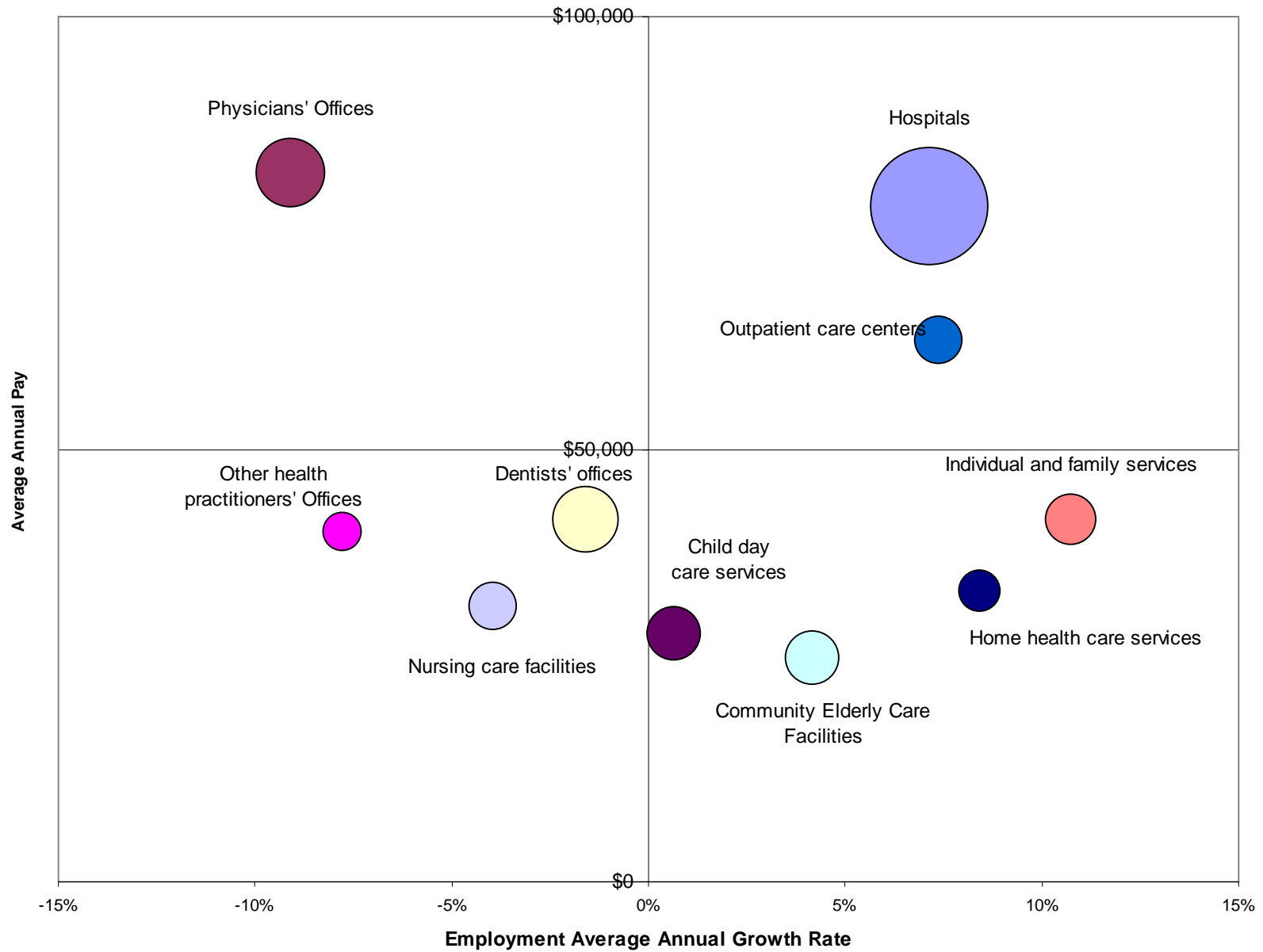
Health Care

Concentration, Size, and Growth, Health and social assistance

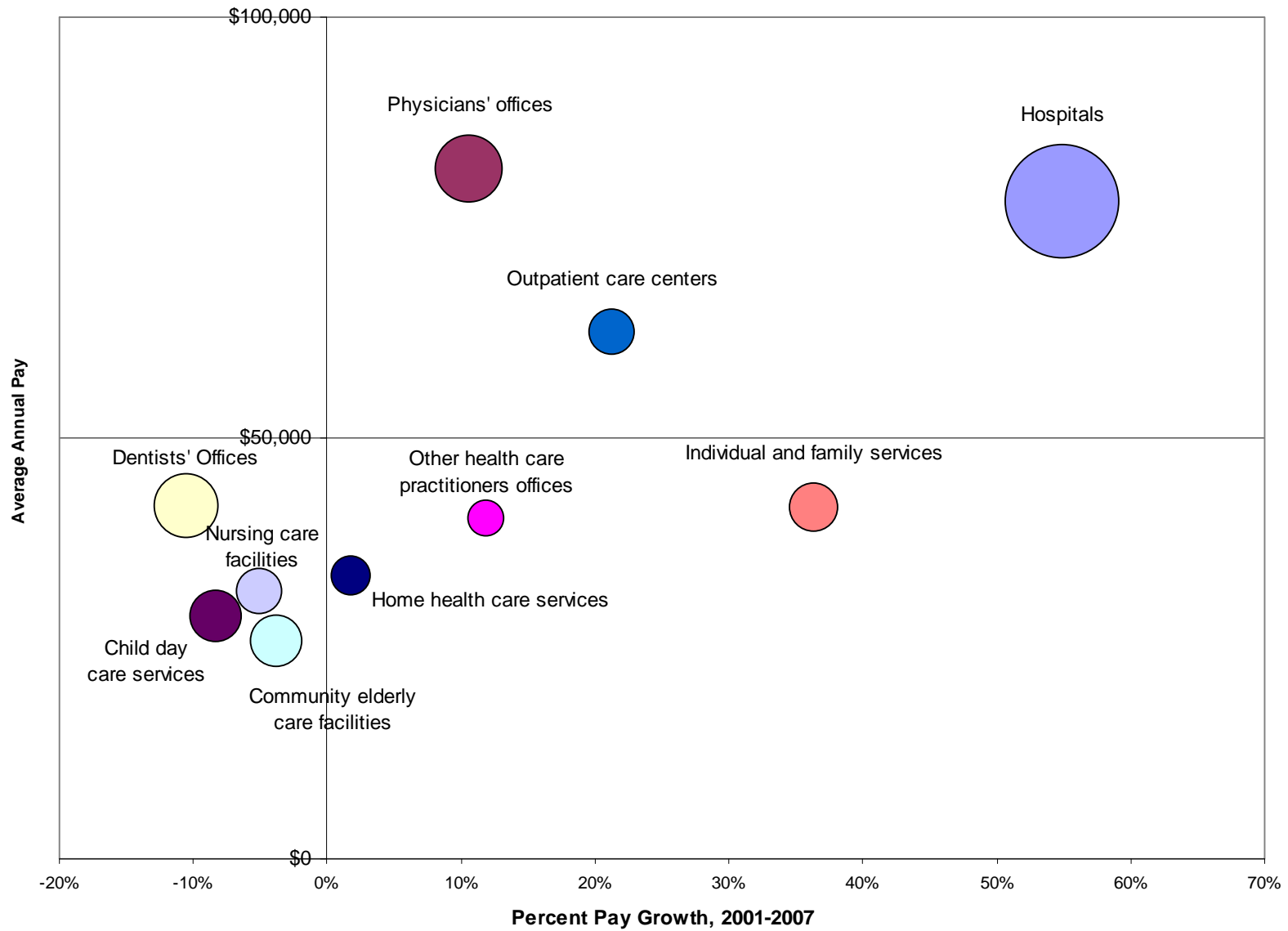




Average Annual Pay, Size, and Growth, Health and social assistance



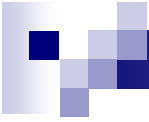
Average Annual Pay, Size, and Pay Growth, Health and social assistance



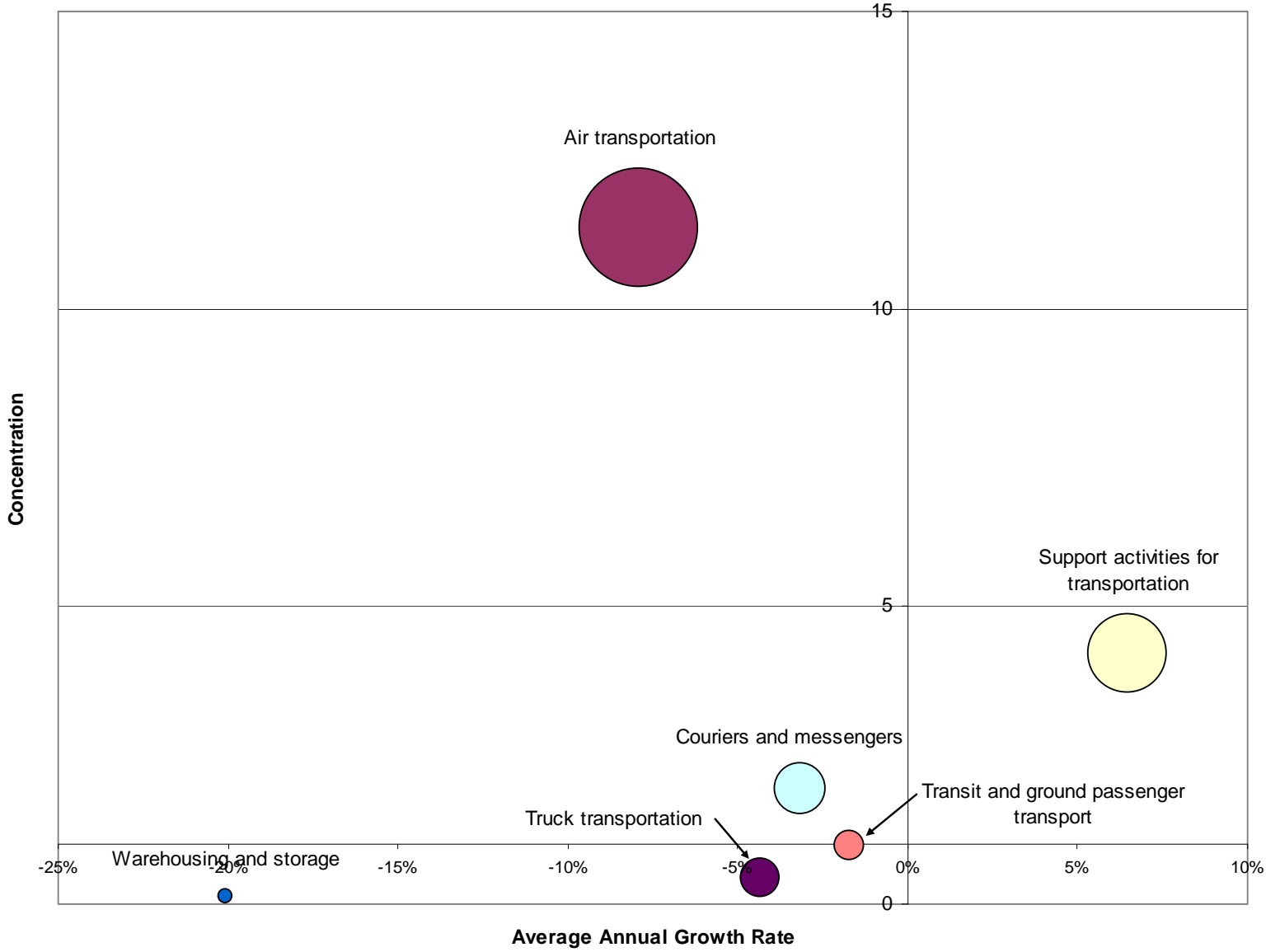


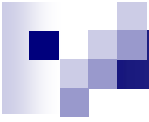
Analysis of sub- sectors

Transportation

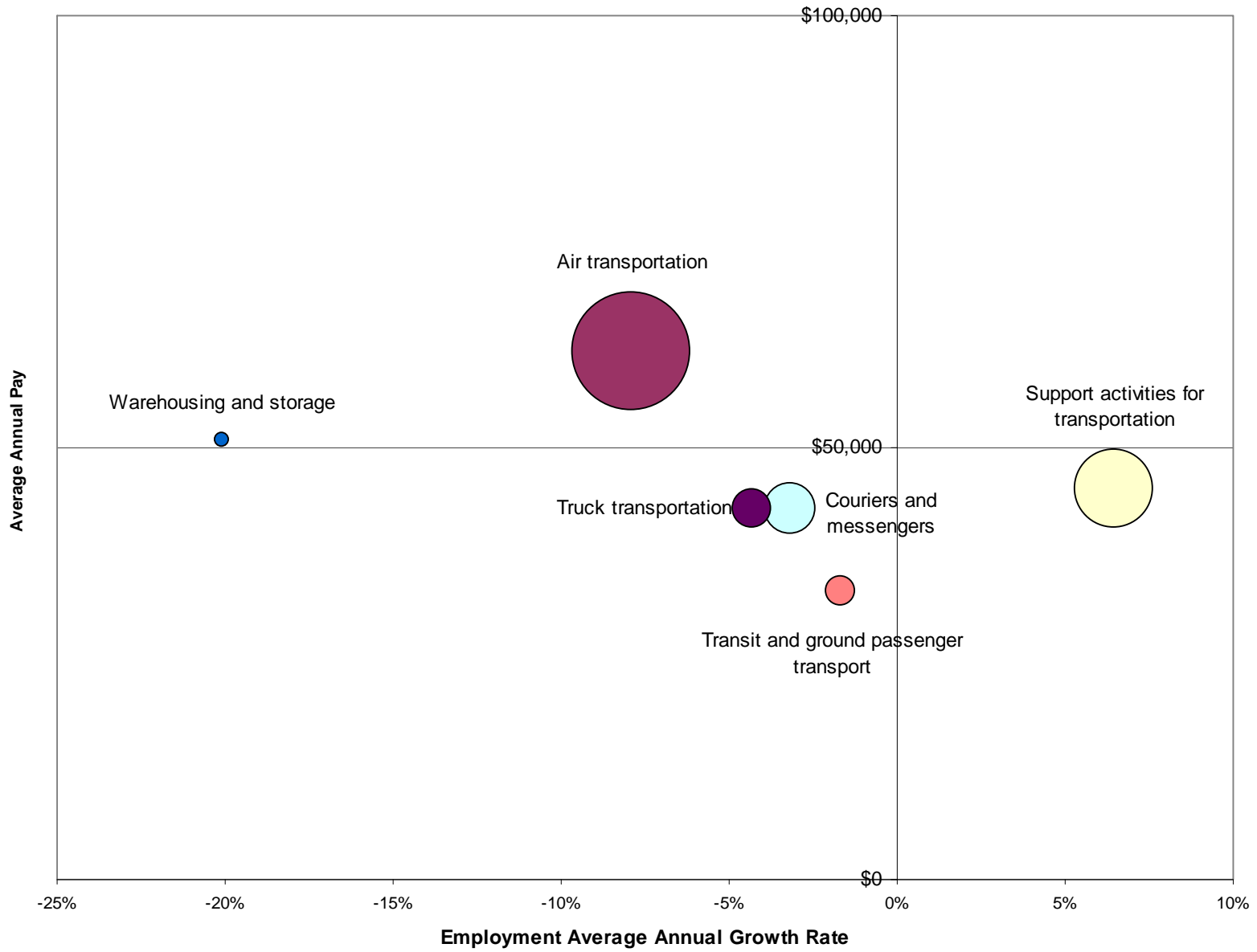


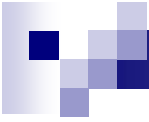
Concentration, Size, and Growth, Transportation & Warehousing



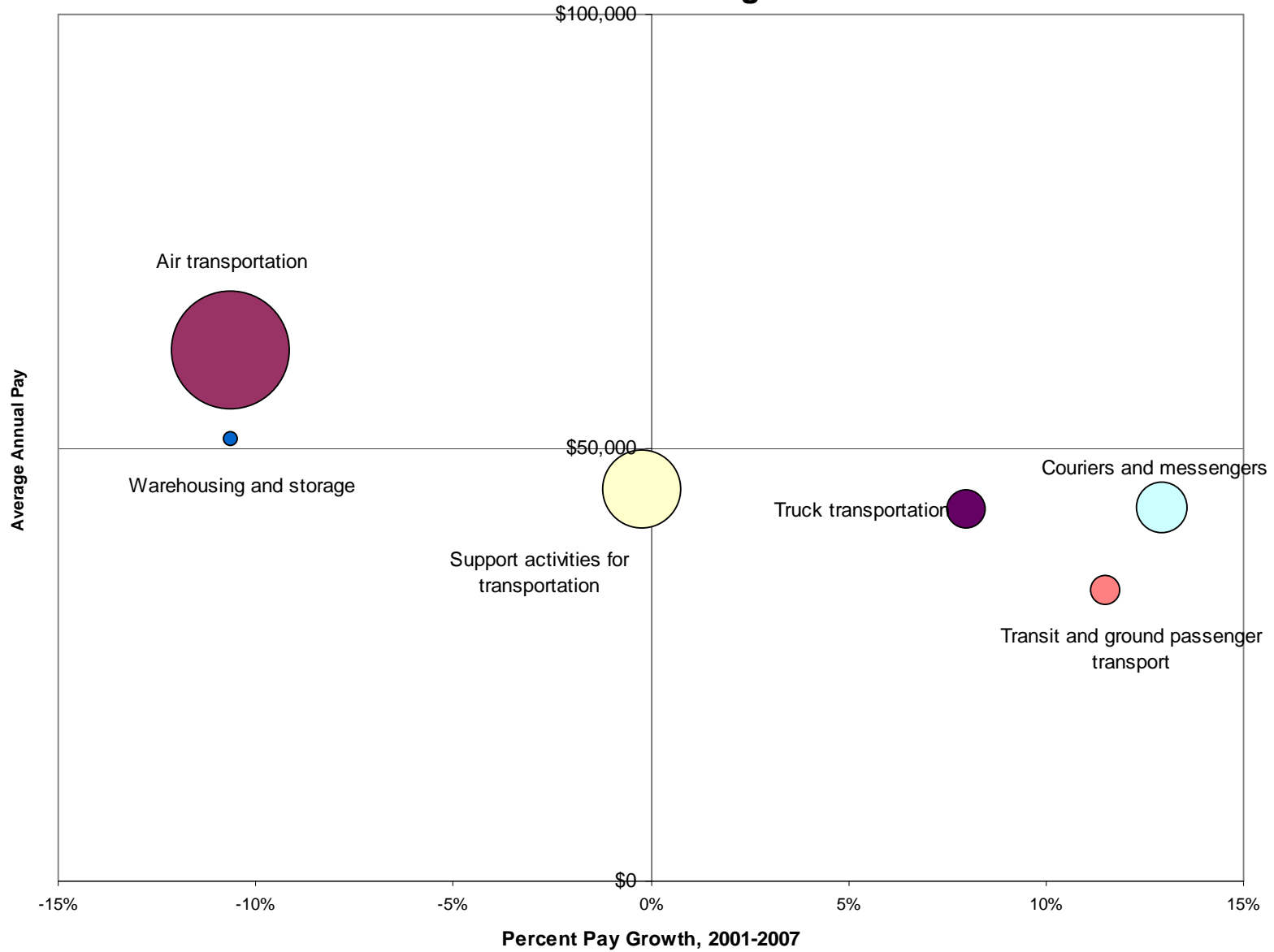


Average Annual Pay, Size, & Growth, Transportation & Warehousing





Average Annual Pay, Size, & Pay Growth, Transportation & Warehousing





Conclusions

- Broad overview not encouraging
 - Mostly declining or stagnant job growth
 - High inequality
- Some encouraging signs
 - Health care and social assistance
 - Bio-tech/pharmaceutical
- Also important to pay attention to transportation sector
- Need for stakeholder engagement for more detailed analysis and strategy development