Goals of the Regional Assessment

- What is the economic region?
  - Why the North San Joaquin Valley?
- Steps to Developing a Regional Economic Development Strategy
  1. Research and Assessment
  2. Identifying Strategies and Actions
  3. Implementation
- Our objective is to make a case for the NSJV, complete the research phase, and spark a conversation about regional strategies.
The North San Joaquin Valley is a core part of the Northern California Megaregion.
In 2013, the Federal Government added San Joaquin County to the San Jose-San Francisco-Oakland Combined Statistical Area due to growing economic integration.
Site Regions

One of the largest markets in the world, California is home to more than 36.7 million people and has 58 counties and over 480 incorporated cities. California’s size and diversity offer a wide range of opportunities for every kind of business venture. We want to make it easy for you to discover which of the state’s ten Site Selection Regions offer the most value for your project.

- Upstate California
- Sacramento Region
- Bay Area
- Central Valley
- Central Sierra
- Central Coast
- Los Angeles
- Orange County
- Inland Empire
- San Diego/Imperial
- Team California
A short list of things that are closer to the NSJV than Bakersfield.

<table>
<thead>
<tr>
<th>From the edge of the NSJV to:</th>
<th>Time:</th>
<th>Distance:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tower Bridge Sacramento</td>
<td>23 minutes</td>
<td>24 miles</td>
</tr>
<tr>
<td>S.F.-Oakland Bay Bridge</td>
<td>45 minutes</td>
<td>47 miles</td>
</tr>
<tr>
<td>Yosemite Valley</td>
<td>1 hour</td>
<td>50 miles</td>
</tr>
<tr>
<td>Monterey Aquarium</td>
<td>1 hour</td>
<td>56 miles</td>
</tr>
<tr>
<td>South Lake Tahoe</td>
<td>2 hours</td>
<td>95 miles</td>
</tr>
</tbody>
</table>
Environmental Quality

NUMBER OF UNHEALTHY AIR QUALITY DAYS
For Older Adults and Children
San Joaquin Valley and Selected Counties, 2011

<table>
<thead>
<tr>
<th>County</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riverside</td>
<td>122</td>
</tr>
<tr>
<td>San Bernardino</td>
<td>119</td>
</tr>
<tr>
<td>Tulare</td>
<td>112</td>
</tr>
<tr>
<td>Fresno</td>
<td>99</td>
</tr>
<tr>
<td>Kern</td>
<td>98</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>94</td>
</tr>
<tr>
<td>Madera</td>
<td>55</td>
</tr>
<tr>
<td>Sacramento</td>
<td>52</td>
</tr>
<tr>
<td>Kings</td>
<td>52</td>
</tr>
<tr>
<td>Stanislaus</td>
<td>44</td>
</tr>
<tr>
<td>Merced</td>
<td>36</td>
</tr>
<tr>
<td>El Dorado</td>
<td>25</td>
</tr>
<tr>
<td>Placer</td>
<td>22</td>
</tr>
<tr>
<td>Imperial</td>
<td>21</td>
</tr>
<tr>
<td>San Joaquin</td>
<td>20</td>
</tr>
</tbody>
</table>
North San Joaquin Valley

- Is Socio-Economically similar to the rest of the San Joaquin Valley, but economic integration with much of the San Joaquin Valley is low.

- Economic Integration with Northern California (the Bay Area) is significant and growing, but Socio-Economic differences are stark.

- The NSJV is a unique and distinct economic region.
The problem: NSJV per-capita income has been in steady decline since the 1980’s.

The 3-county region had per-capita income 10% above the U.S. average in the 1970’s, similar to the Bay Area. Per-capita income is now 15% below the U.S. average.
Farming is biggest industry in NSJV, but not as dominant as the South Valley.

**North San Joaquin Valley**

(Jobs in all industries: 399.4K)

- Farm: 278
- Constr: 110
- Manuf: 121
- Wh. Ret.: 89
- TWU: 113
- Info.: 150
- Fin.: 40
- Bus.: 69
- EHS: 57
- Leis.: 114
- Oth: 83
- SGov: 103
- Total: 104

**South Valley**

(Jobs in all industries: 948.3K)

- Farm: 682
- Constr: 100
- Manuf: 79
- Wh. Ret.: 65
- TWU: 94
- Info.: 96
- Fin.: 36
- Bus.: 59
- EHS: 54
- Leis.: 88
- Oth: 73
- SGov: 76
- Total: 132
Why not focus the assessment and strategy on agriculture?

There were 13,500 farm proprietors 40 years ago, and 8,500 today.

Farm employment has been steady at around 40,000.

Population has grown from 600,000 to 1.5 million over 40 years.
Recent Trends In Farm Profits and Wages are Very Positive, But Growth Capacity is Limited.
Industry mix without farming.

- NSJV industry mix has much more Transportation/Warehousing, Manufacturing, and less government dependence than South Valley.

![Bar chart comparison between North San Joaquin Valley and South Valley](chart.png)

**North San Joaquin Valley**

(Jobs in all industries: 399.4K)

**South Valley**

(Jobs in all industries: 948.3K)
Traded Industrial Cluster Analysis

- Transportation and Logistics
- Distribution and Electronic Commerce
- Paper and Packaging
- Wood Products
- Environmental Services
- Printing Services
- Plastics
- Furniture
- Trailers, Motor Homes, and Appliances

Years:
- 1998
- 2011
NSJV Workforce Flows

Labor Markets define economic regions.
Number of NSJV Out-Commuters by Industry

- Construction: 16,925
- Manufacturing: 12,449
- Prof. & Bus. Serv.: 10,034
- Educ. & Health: 9,520
- Retail trade: 7,215
- Public administration: 6,770
- Trans. & Warehouse: 6,709
- Finance, Ins., & RE: 4,979
- Hospitality & Ent.: 3,965
- Wholesale trade: 3,599
- Information: 3,065
- Other services: 2,815
- Agriculture: 1,735
Share of NSJV Workers by Industry who Commute Out of the NSJV

- Construction: 33.8%
- Information: 29.9%
- Prof. & Bus. Services: 27.6%
- Tran & Warehouse: 22.9%
- Manufacturing: 20.3%
- Wholesale trade: 18.7%
- Finance, Ins., & RE: 16.2%
- Retail trade: 15.5%
- Other services: 10.4%
- Hospitality & Ent: 10.3%
- Educ. & Health: 9.6%
- Agriculture: 8.7%
- 5.2%
Human Capital Index For California Regions.
Clusters of High Human Capital Within the NSJV.
## California’s Patents per 10,000 workers

<table>
<thead>
<tr>
<th>Region</th>
<th>1990</th>
<th>2011</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Coast</td>
<td>2.0</td>
<td>2.0</td>
<td>1%</td>
</tr>
<tr>
<td>Greater Bay Area</td>
<td>8.5</td>
<td>53.5</td>
<td>529%</td>
</tr>
<tr>
<td>Northern Central Coast</td>
<td>4.5</td>
<td>23.3</td>
<td>419%</td>
</tr>
<tr>
<td>Southern Central Coast</td>
<td>6.5</td>
<td>12.0</td>
<td>84%</td>
</tr>
<tr>
<td>Mother Lode</td>
<td>1.5</td>
<td>5.4</td>
<td>269%</td>
</tr>
<tr>
<td>Eastern Sierra Nevada</td>
<td>2.3</td>
<td>1.3</td>
<td>-41%</td>
</tr>
<tr>
<td>Northern Sierra Nevada</td>
<td>7.7</td>
<td>9.7</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Northern San Joaquin Valley</strong></td>
<td>1.8</td>
<td>2.5</td>
<td>38%</td>
</tr>
<tr>
<td>Southern San Joaquin Valley</td>
<td>1.4</td>
<td>1.7</td>
<td>22%</td>
</tr>
<tr>
<td>Shasta Cascades</td>
<td>1.8</td>
<td>1.4</td>
<td>-21%</td>
</tr>
<tr>
<td>Northern Sacramento Valley</td>
<td>5.7</td>
<td>1.5</td>
<td>-74%</td>
</tr>
<tr>
<td>Greater Sacramento</td>
<td>2.1</td>
<td>5.4</td>
<td>151%</td>
</tr>
<tr>
<td>Greater Los Angeles</td>
<td>4.7</td>
<td>10.2</td>
<td>118%</td>
</tr>
<tr>
<td>Inland Empire</td>
<td>2.6</td>
<td>3.3</td>
<td>24%</td>
</tr>
<tr>
<td>Greater San Diego</td>
<td>7.3</td>
<td>25.3</td>
<td>245%</td>
</tr>
<tr>
<td><strong>State-Wide</strong></td>
<td>5.3</td>
<td>19.7</td>
<td>272%</td>
</tr>
</tbody>
</table>
NSJV’s Patents per 10,000 workers
Migration Patterns in 2011

- 43,290 people moved out of the NSJV
- 54,082 people moved in to the NSJV
- 22,305 people moved out of San Joaquin County
- 31,473 people moved in to San Joaquin County
- 18,945 people moved out of Stanislaus County
- 22,018 people moved in to Stanislaus County
- 9,849 people moved out of Merced County
- 10,988 people moved in to Merced County
Net Migration and Education, 2011
(age 25 & older)

- NSJV has positive net migration: gains from CA and international, offset out-migration to other States.
- 17.4% of NSJV residents have bachelors or above
  - International Migrants 20%
  - California Migrants 16%
  - Only 14% of residents who leave for other states have BA

<table>
<thead>
<tr>
<th></th>
<th>Other CA</th>
<th>Other States</th>
<th>International</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Net Migration for NSJV</td>
<td>8,573</td>
<td>-2,761</td>
<td>4,522</td>
<td>10,334</td>
</tr>
<tr>
<td>Bachelors+</td>
<td>1,387</td>
<td>-394</td>
<td>908</td>
<td>1,901</td>
</tr>
<tr>
<td>% Bachelors +</td>
<td>16%</td>
<td>14%</td>
<td>20%</td>
<td>18%</td>
</tr>
</tbody>
</table>
## Net Migration and Education, by County (age 25 & older)

<table>
<thead>
<tr>
<th>County</th>
<th>Bachelors+</th>
<th>Other CA</th>
<th>Other States</th>
<th>International</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>San Joaquin County (20% BA+)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>2,385</td>
<td>-490</td>
<td>2,604</td>
<td>4,959</td>
<td></td>
</tr>
<tr>
<td>Bachelors+</td>
<td>379</td>
<td>42</td>
<td>587</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>-9%</td>
<td>23%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td><strong>Stanislaus County (16% BA+)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>963</td>
<td>-1,179</td>
<td>1,580</td>
<td>1,025</td>
<td></td>
</tr>
<tr>
<td>Bachelors+</td>
<td>-12</td>
<td>-264</td>
<td>265</td>
<td>-54</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-1%</td>
<td>22%</td>
<td>17%</td>
<td>-5%</td>
<td></td>
</tr>
<tr>
<td><strong>Merced County (13% BA+)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>703</td>
<td>-1,092</td>
<td>338</td>
<td>304</td>
<td></td>
</tr>
<tr>
<td>Bachelors+</td>
<td>112</td>
<td>-172</td>
<td>56</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>16%</td>
<td>17%</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>
Some Opportunities for Regional Collaboration for Econ Devt.

- A NSJV Economic Development Organization
  - Marketing/Branding
  - Information
  - Better engagement with State and Mega-Region.
- Transportation Infrastructure
  - Roads, Rail and Air
- Education and Workforce Development
- Innovation and Entrepreneurship
- More…
Plan for the Morning

Panel 1: Components of NSJV Economic System
- Jeff Rowe, Alliance Worknet
- Dan Leavitt, Altamont Corridor Express
- Robert Lung, Merced County Community and & Econ Devt
- Steven Ames, Stanislaus Alliance
- Shelley Burcham, San Joaquin Partnership

Panel 2: Working as a Region
- Tracey Grose, VP, Bay Area Council Economic Institute
- Robert Burris, Executive VP, SACTO
- Mike Ammann, Pres. & CEO, San Joaquin Partnership
- Dave White, CEO, Stanislaus Alliance
Questions and Comments

- During the Panels Today
  - Index Cards – Brief Question/Comment, include name and affiliation, give to staff.
  - Moderator will review and select individuals for questions/comments.

- After the Event
  - You will receive a survey by email.
  - All comments will be shared with participants, and could be included in our summary report.