

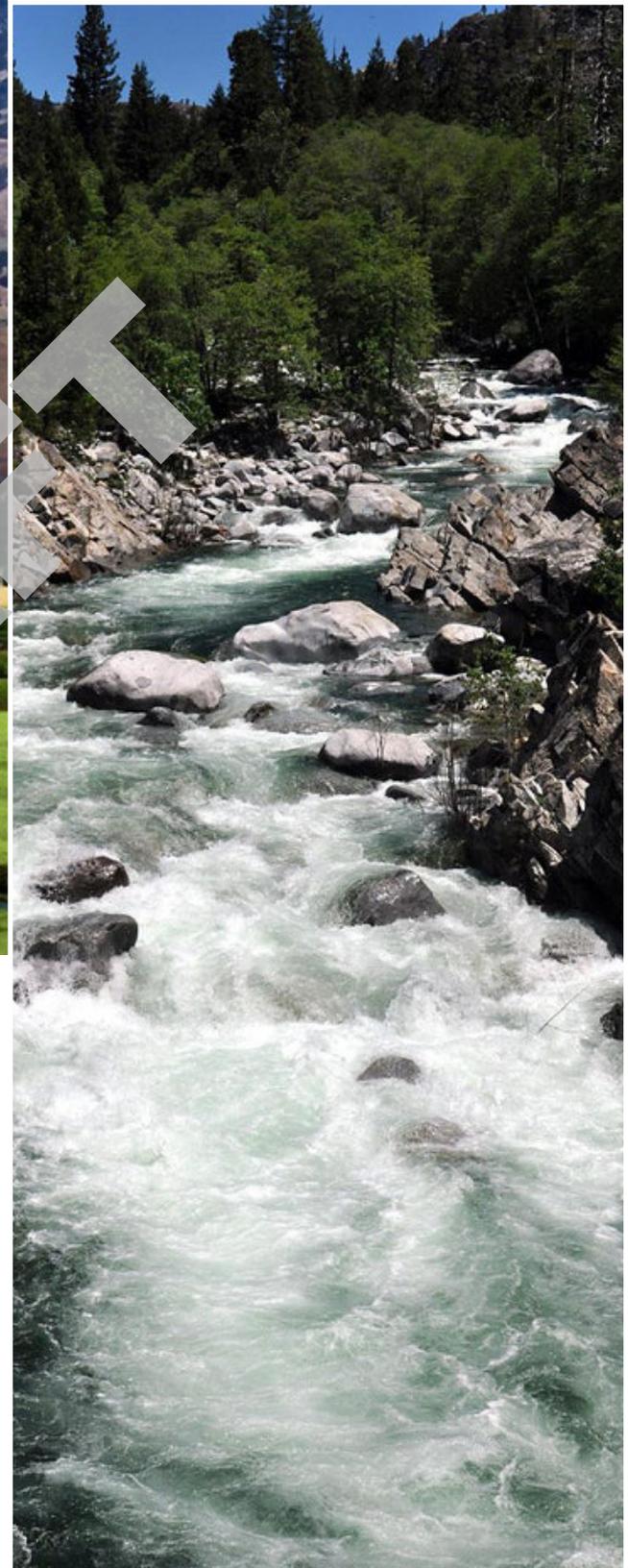
BUILDING PROSPERITY IN THE YUBA-SUTTER REGION

APPENDIX I

DATA PROFILES

2020-2025

COMPREHENSIVE
ECONOMIC
DEVELOPMENT
STRATEGY



ECONOMIC STRENGTH RANKING

In 2020, Yuba City, CA moved to an economic strength ranking of 99 out of 384 MSAs, up 175 points from 2016

Economic strength rankings measure how the economy has behaved, not why. A local economy is defined by where people live and work, earn and spend. The criteria to determine the economic strength are industrial sectors and consistency of growth (rate or stability).

Metropolitan Statistical Areas (MSA) have at least one urbanized area with a population of at least 50,000, plus adjacent territory (counties) which have a high degree of social and economic integration with the core as measured by commuting. The Yuba-Sutter region is identified as Yuba City, CA MSA. There are 384 MSAs in the United States.

Industrial Sectors:

Group 1 – Industrial sectors reflect overall growth in size and quality. The quality of the economy is based upon what people earn, as individual earnings influences a person’s “standard of living”.

All Workers- Earnings, Jobs and Wages

Per Capita Total Worker Earnings, Personal Income and Earnings by Residences.

Wage & Salaried Workers- Earnings

Wage & Salaried Workers – Jobs and Wage & Salaried Workers Wages

Group 2 – These sectors reflect how the economy is behaving. Small businesses and the construction and retail industries are extremely reactive to the “flow of money” coming into an area. They typically grow or decline in direct proportion to the condition of the economy.

There are, of course, exceptions. Areas, which have become destinations for retirement age individuals will have high growth numbers in both construction and retail, while they might not have a strong economy.

Non Farm Proprietors- Earnings, Jobs and Wages

Construction- Worker Earnings, Jobs and Wages

Retail- Worker Earnings, Jobs and Wages

Group 3 – These sectors are negative sectors. Growth in these reflects a poor economy.

Per Capita Income Maintenance (Welfare)

Actual Per Capita Income Maintenance (Welfare)

Per Capita Medical Assistance for the Poor- (Medicaid)

Actual Per Capita Medical Assistance for the Poor- (Medicaid)

Consistency of Growth:

Simply identifying the areas that have the fastest or slowest growth rates is insufficient when trying to determine the character of a local economy. The rate, consistency, or stability of the growth is equally important.



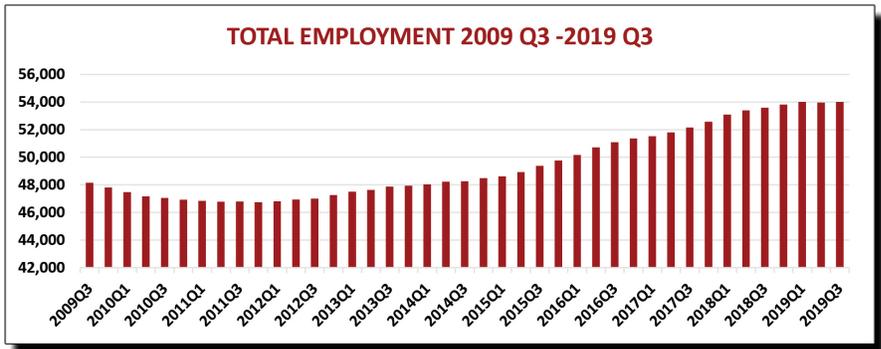
ECONOMIC STRENGTH RANKINGS

2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
99	121	181	237	274	246	253	227	200	206

EMPLOYMENT/OCCUPATION OVERVIEW

EMPLOYMENT GROWTH

The region has a civilian labor force of 74,410 and as of 2019Q3, total employment for the Yuba City, CA MSA was 54,019 (based on a four-quarter moving average). Over the year ending 2019Q3, employment increased 0.4 percent in the region and over 12 percent since 2010.



UNEMPLOYMENT RATE

The seasonally adjusted unemployment rate for the Yuba City, CA MSA was 6.3 percent as of December 2019. The regional unemployment rate was higher than the national rate of 3.7 percent. One year earlier, in December 2018, the unemployment rate in the Yuba City, CA MSA was 6.9 percent.

WAGE TRENDS

The average worker in the Yuba City, CA MSA earned annual wages of \$46,275 as of 2019Q3. Average annual wages per worker increased 3.0 percent in the region over the preceding four quarters. For comparison purposes, annual average wages were \$57,681 in the nation as of 2019Q3.

OCCUPATION SNAPSHOT

The largest major occupation group in the Yuba City, CA MSA is Office and Administrative Support Occupations, employing 6,466 workers. The next-largest occupation groups in the region are Sales and Related Occupations (5,034 workers) and Education, Training, and Library Occupations (4,317 workers). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 10.43), Education, Training, and Library Occupations (1.43), and Personal Care and Service Occupations (1.43).

Occupation groups in the Yuba City, CA MSA with the highest average wages per worker are Management Occupations (\$103,100), Legal Occupations (\$100,400), and Healthcare Practitioners and Technical Occupations (\$95,900). The

unemployment rate in the region varied among the major groups from 2.5 percent among Management Occupations to 11.5 percent among Farming, Fishing, and Forestry Occupations.

Over the next 10 years, the fastest growing occupation group in the Yuba City, CA MSA is expected to be Personal Care and Service Occupations with a +2.3 percent year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Personal Care and Service Occupations (+864 jobs) and Food Preparation and Serving Related Occupations (+392 jobs). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (7,304 jobs) and Sales and Related Occupations (7,011 jobs).

FASTEST GROWING OCCUPATIONS

- 
Maids / Housekeeping Cleaners
81%
- 
Personal Care & Nursing Assistant
34.7%
- 
Cooks, Restaurants
38.1%
- 
Industrial Truck and Tractor Operators
35.3%
- 
Waiters & Waitresses
29.5%
- 
Billing & Posting Clerks
25%
- 
Hairdressers, Hairstylists & Cosmetologists
25%
- 
Medical Assistants
25%

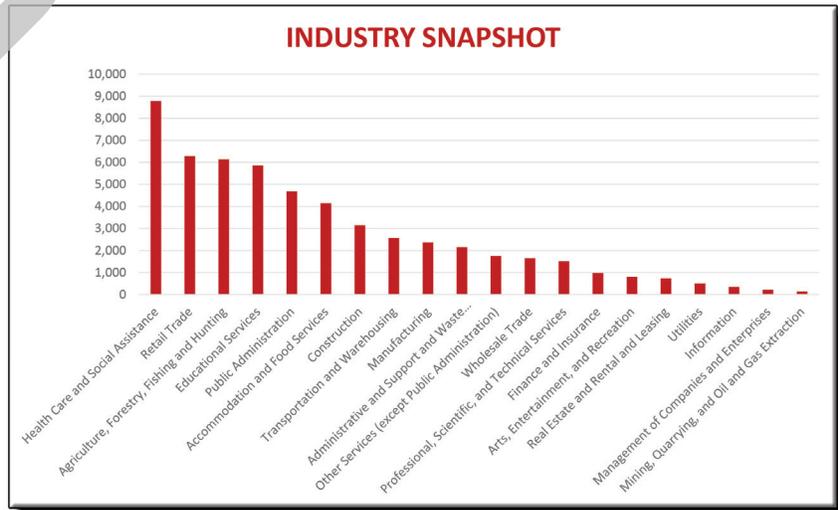
INDUSTRY SNAPSHOT



The largest sector in the Yuba City, CA MSA is Health Care and Social Assistance, employing 8,661 workers. The next largest sectors in the region are Retail Trade (6,350 workers) and Agriculture, Forestry, Fishing and Hunting (5,944 workers). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Agriculture, Forestry, Fishing and Hunting (LQ = 8.25), Public Administration (1.83), and Utilities (1.77).

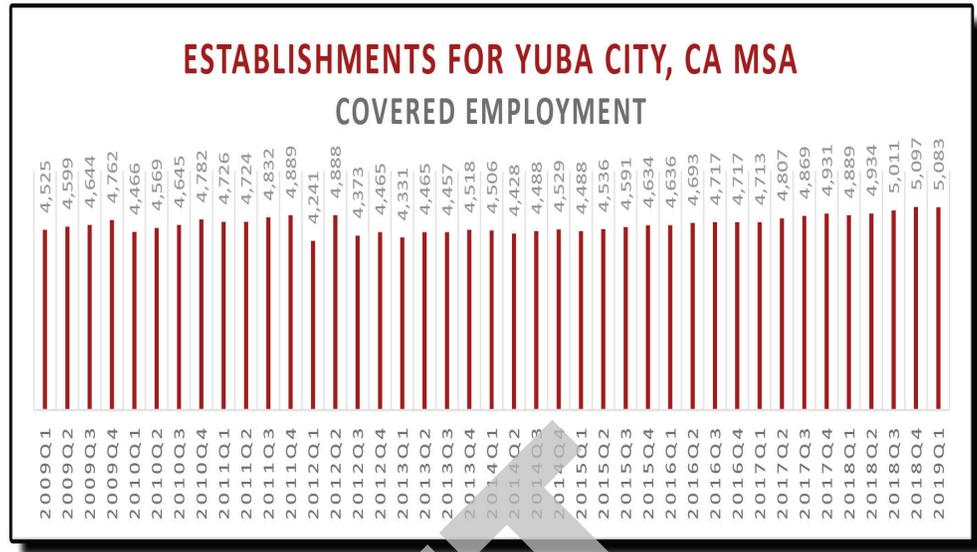
Sectors in the Yuba City, CA MSA with the highest average wages per worker are Mining, Quarrying, and Oil and Gas Extraction (\$78,618), Utilities (\$72,526), and Public Administration (\$71,451). Regional sectors with the best job growth (or most moderate job losses) over the last 10 years are Health Care and Social Assistance (+2,738 jobs), Construction (+818 jobs), and Accommodation and Food Services (+768 jobs).

Over the next 10 years, employment in the Yuba City, CA MSA is projected to expand by 2,486 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.7% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+1,585 jobs), Accommodation and Food Services (+404 jobs), and Construction (+288 jobs).



BUSINESS ESTABLISHMENTS

The Yuba-Sutter region's number of covered employment establishments (Businesses whose employees are covered by unemployment insurance benefits.) grew 12.33 percent over the past 10 years from 4,525 to 5,083. There was a substantial dip in the growth in 2012 as a direct result of the 2009 recession which came a bit slower to the area. However the region recuperated steadily in the following years and continues to grow.



TOP 10 EMPLOYERS - SUTTER COUNTY (2019)

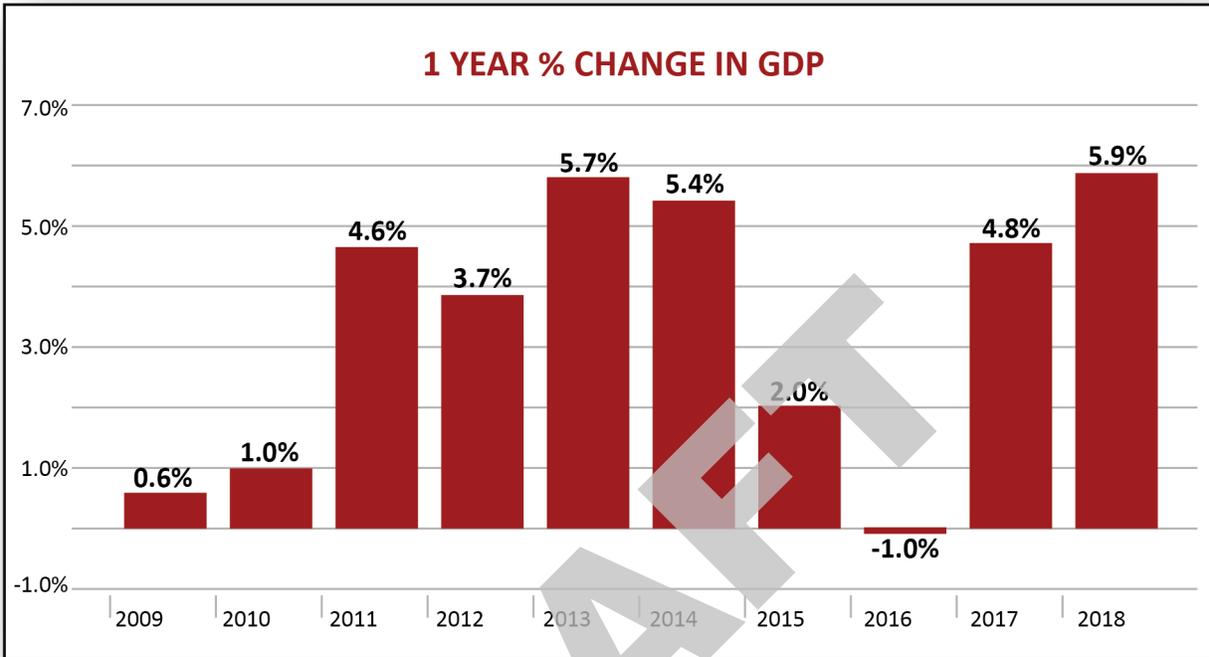
Company Name	Employees	Business Type
Yuba City Unified School District	1,410	Education
Sutter County - All Depts.	1,012	Government
Legend Transportation	650	Transportation - Goods Moving
Sunsweet Grower's Inc.	620	Food Processing
City of Yuba City - All Depts.	482	Government
Sysco Sacramento, Inc.	405	Wholesale Food Distribution
Walmart - Yuba City	402	Retail
Sierra Gold Nurseries	350	Wholesale Fruit & Nut Trees
Home Depot	300	Retail
Valley Fine Foods	186	Food Manufacturing

TOP 10 EMPLOYERS - YUBA COUNTY (2019)

Company Name	Employees	Business Type
Beale AFB - Military & Civilian	6,882	Military
Adventist Health + Rideout	2,109	Healthcare
Marysville Joint Unified School District	1,000	Education
Yuba County - All Departments	832	Government
Caltrans DOT Transportation Dept.	720	State Hwy. Construction
Yuba College (Marysville Campus)	708	Education
Bishop's Pumpkin Farm	550	Agriculture Tourism
Toyota Amphitheater	400	Entertainment / Tourism
Frank M. Booth	380	Construction
Walmart - Marysville	359	Retail

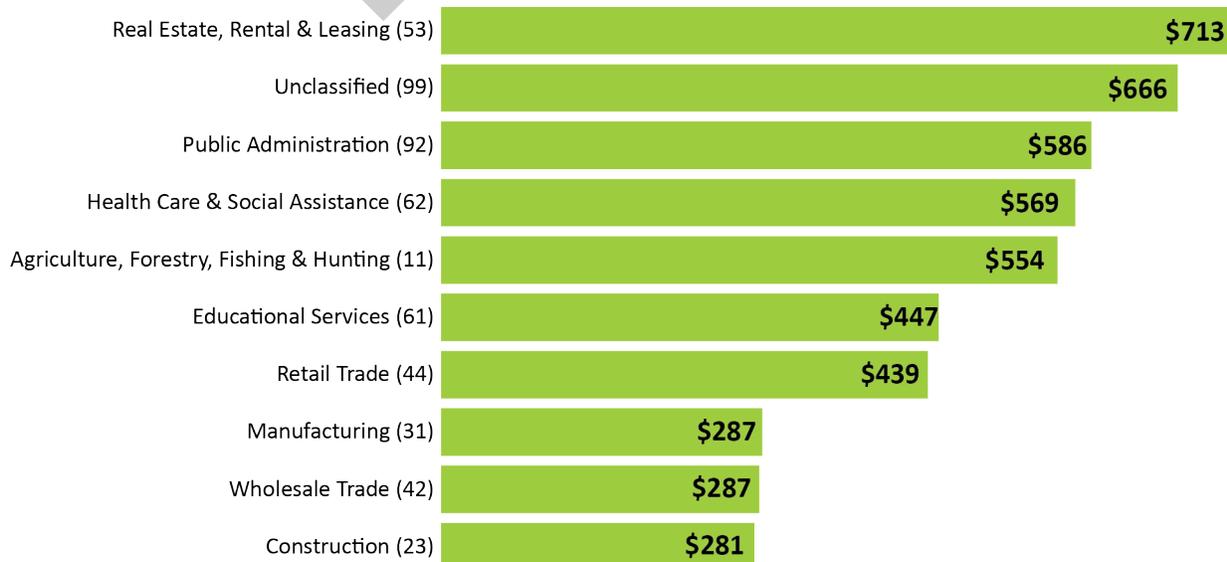
GROSS DOMESTIC PRODUCT

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2018, nominal GDP in the Yuba City, CA MSA expanded 5.9 percent. This follows growth of 4.8 percent in 2017. As of 2018, total GDP in the Yuba City, CA MSA was \$6,066,985,000.



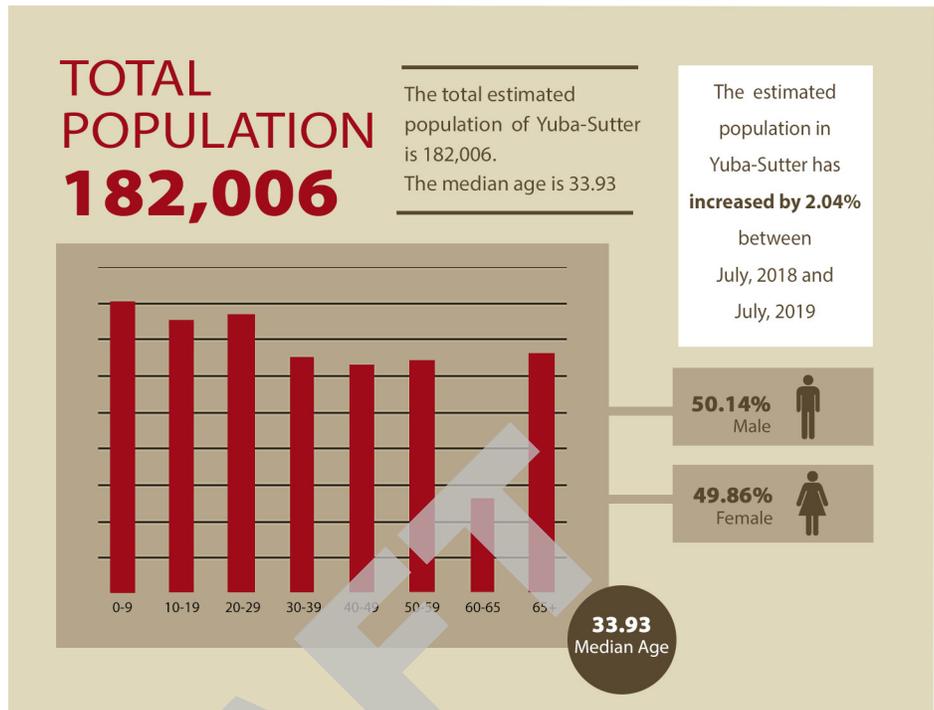
Of the sectors in the Yuba City, CA MSA, Real Estate and Rental and Leasing contributed the largest portion of GDP in 2018, \$712,712,000. The next-largest contributions came from: Unclassified (\$665,656,000); Public Administration (\$586,117,000); and Health Care and Social Assistance (\$568,860,000).

Yuba City, CA MSA GDP (in millions)



POPULATION, AGE & HOUSEHOLDS

According to the California Department of Finance, Sutter County's preliminary estimated population for July 2019 was 103,580, an increase of 2.21 percent over July 2018 data. About 65 percent or 67,536 Sutter County residents reside in Yuba City, the county seat and largest city. Yuba City serves as the center for shopping and business for Sutter and Yuba counties as well as parts of Butte and Colusa counties. Sutter County's total population is projected to reach 114,346 residents by the year 2025, an increase of 20.5 percent over Census 2010 figures. The county's population is projected to increase to 157,991 (66.5 percent) by 2060.



Yuba County's preliminary estimated population for July 2019 was 78,426, an increase over 2018 data of 1.1 percent. The largest city within the county, Marysville, is the county seat and one of California's most historic cities. Its history as a community dates to California's Gold Rush era. Much of Yuba-Sutter's agricultural, recreational, educational and industrial activities are located within Yuba County. Of the Yuba County population, more than 78.5 percent reside in the unincorporated areas. The population in Yuba County is projected to reach 84,206 by the year 2025, an increase of 16.4 percent above the 2010 census. Yuba County's population is projected to increase to 122,028 (68.7 percent) by 2060.

As the area's population is expected to increase 34.8 percent over the next 30 years, the cities and counties are working to manage this growth by improving infrastructure elements such as roads, water, wastewater, and levee systems. Special attention to major transportation arteries will be especially critical.

Households

According to the 2010 Census, of the 55,744 households in Yuba-Sutter, the average number of persons per household is 2.95, like that of the state at 2.90. 73.2 percent are family households and 53.1 percent are married couples. The 2017 American Community Survey estimates that there are 62,685 housing units in the region with 1.2 percent homeowner vacancy and 4 percent rental vacancy. There are 21 percent more households who own their homes than there are renters.

INCOME AND SPENDING

Households in Yuba and Sutter Counties earn a median annual income of \$59,730. 38.29 percent of the households earn more than the national households average each year. Household expenditures average \$58,406 per year.

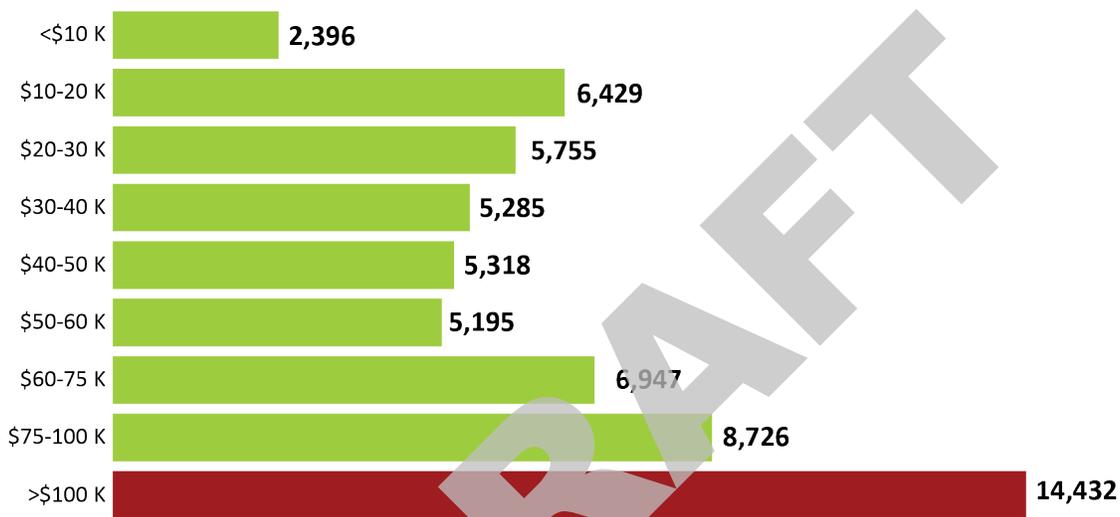
\$59,730

Median Household Income

20% less than the state

6% less than the nation

Income Distribution



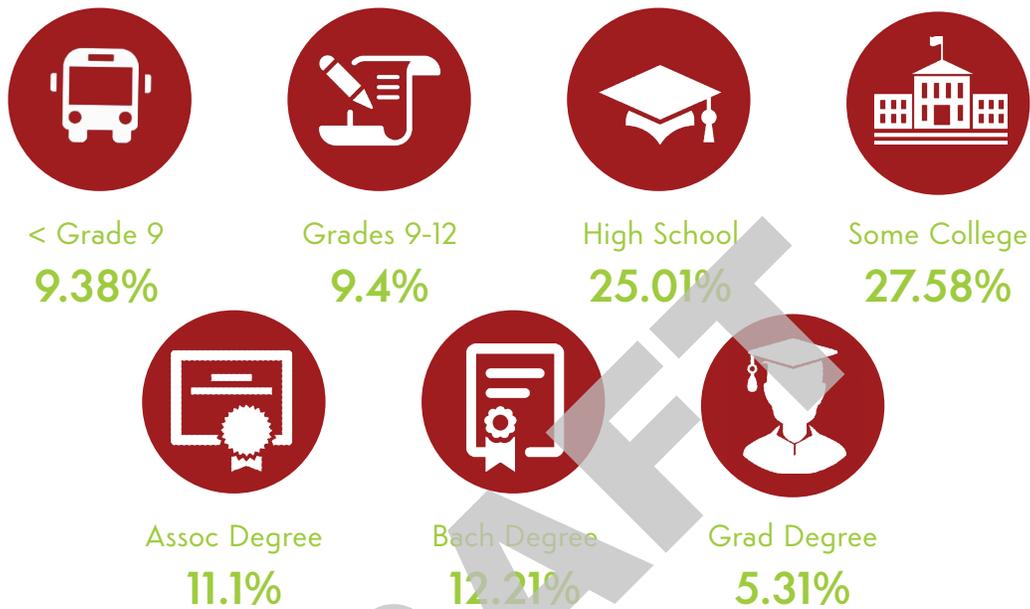
The majority of earnings get spent on shelter, transportation, food and beverages, health care, and entertainment.



EDUCATIONAL ATTAINMENT

School enrollment for the population, ages three years and older in Yuba City MSA, including nursery and preschool, kindergarten, elementary, high school, college and graduate school, in 2013-2017 U.S. Census Bureau American Community Survey five-year estimates was 47,457 or 26.98 percent of the population.

28.62 percent of the population in Yuba and Sutter Counties have an Associate's degree or higher. 56.2% have completed some college or higher.



POVERTY

Poverty thresholds (U.S. Census Bureau) represent a federal government estimate of the point below which a household of a given size has pre-tax cash income insufficient to meet minimal food and other basic needs. The poverty rate for the Yuba-Sutter region typically has been higher than both national and state levels. American Community Survey 2014-2018 poverty estimates, the percentage of Yuba-Sutter's families for which poverty status is determined to be 16.9 percent compared to the state's percentage of 14.3 percent and USA's level of 14.1 percent. The overall poverty rate for the region is trending down after peaking in 2015 (19.85 percent).

