

the north coast

the counties of del norte, humboldt, mendocino, siskiyou and trinity



Targets of Opportunity
January 31, 2007

What are Targets of Opportunity?



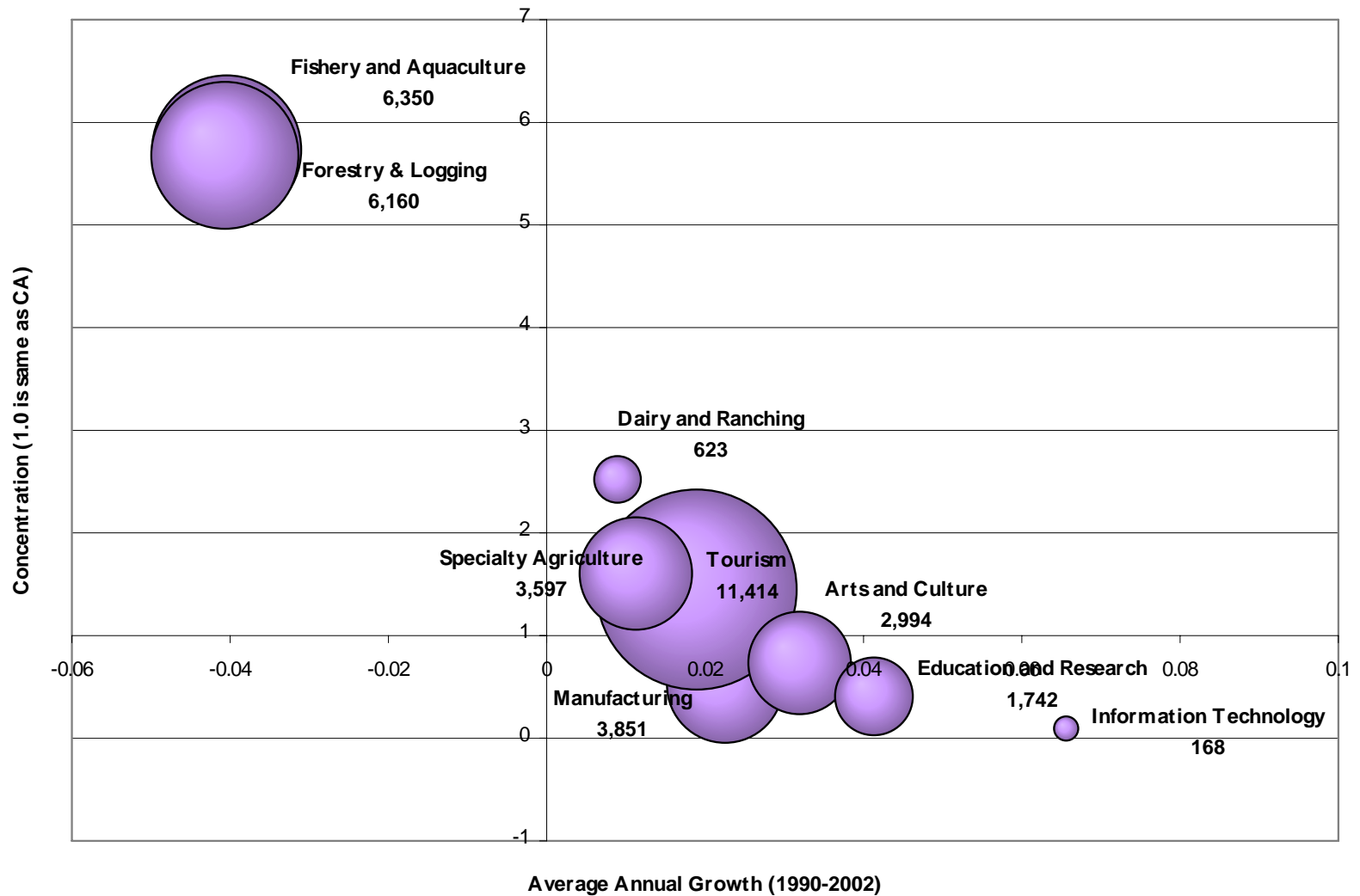
How Targets of Opportunity Were Identified

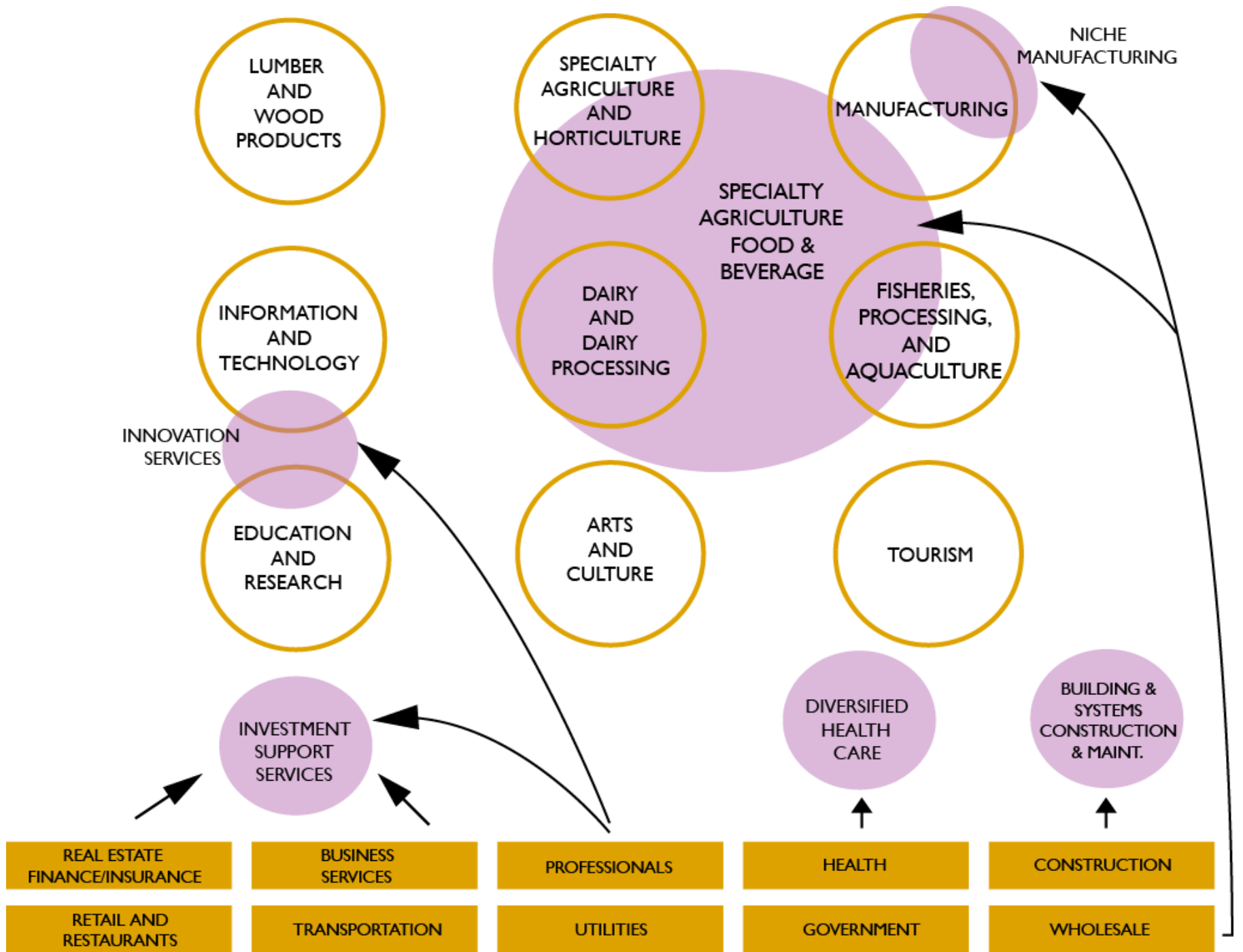
CRITERIA	INTERPRETATION
Expanding Opportunity	<p>JOB GROWTH Shows how various industries have weathered market forces and their subsequent employment generation</p> <p>FIRM GROWTH Growth in firms can indicate a change in organization of an industry, a surge in local entrepreneurship, or attraction of outside investment to the region</p>
Growing Quality	<p>JOB QUALITY High average payroll per employee relative to the regional average indicates a sector with relatively high productivity per employee. Additionally, pay is a reflection of job quality and indicates the amount of training and skill required to perform the job</p>
Improving Competitiveness	<p>STRONG AND/OR GROWING REGIONAL SPECIALIZATION A concentration of greater than 1 indicates that employment in the region is more specialized in the industry compared with U.S. or California. Specialization generally reflects competitiveness and outward orientation.</p>
Career Potential	<p>OCCUPATIONAL DISTRIBUTION AND DYNAMICS Occupational opportunities spread across higher, mid, and lower-levels, suggesting possible pathways for upward mobility. Occupations that are highly-concentrated and/or fast-growing are of particular interest.</p>
Key Linkages	<p>IMPORTANT RELATIONSHIPS AND COMMON NEEDS Related to other sectors in important buyer-supplier or complementary partnering relationships. Share a common workforce, markets, or others.</p>

Six Targets of Opportunity

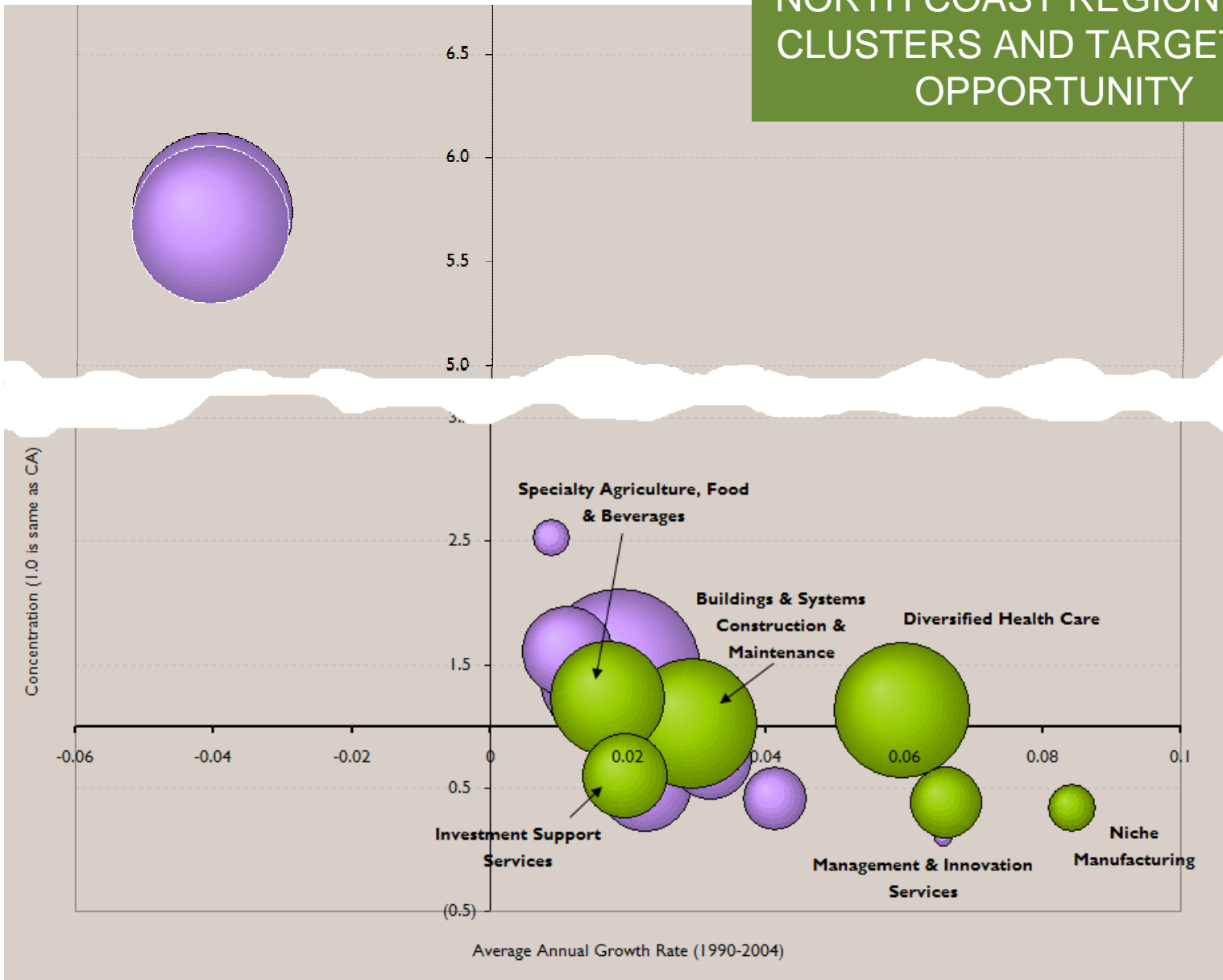
- Diversified Health Care
- Building and Systems Construction and Maintenance
- Specialty Agriculture, Food, and Beverage
- Investment Support Services
- Management and Innovation Services
- Niche Manufacturing

North Coast Region Base Clusters





NORTH COAST REGION BASE CLUSTERS AND TARGETS OF OPPORTUNITY



Six Targets of Opportunity

- Together these sectors comprise 39% of the region's private sector employment (2004)—up from 30% in 1990. They also comprise 53% of the region's private sector wages.
- Together, they grew 37% in employment during this period, while the private sector economy as a whole expanded by only about 4%. Even including government, total regional employment only grew 8% between 1990 and 2004.
- The number of firms in these sectors combined jumped 23%, while the total firms in the entire regional economy increased only 1.5% between 1990 and 2003 (the year with the latest comprehensive data available).

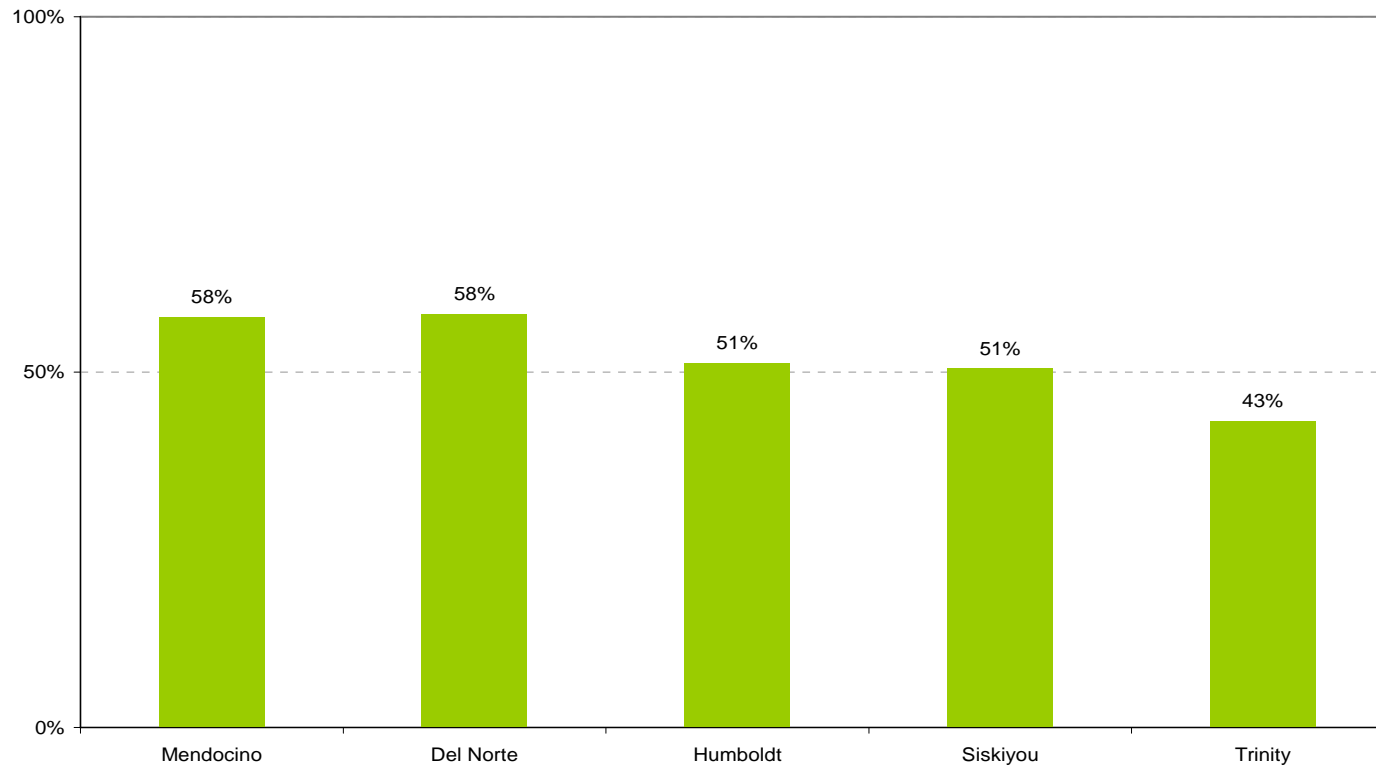
Six Targets of Opportunity

- All six have grown in employment, all of them faster than the region's total job growth of 8%. The targets of opportunity have experienced growth rates ranging from 14% to 125% during the 1990-2004 period.
- All six have experienced growth in real wages (i.e., wages adjusted for inflation) over the 1990-2004 period, all of them faster than the region's total wage growth of 6%. The targets of opportunity have experienced growth rates ranging from 10% to 26% over this period. Five of them pay an average wage higher than the regional average. Three of them have moved from below to above the regional average.
- All six have increased or essentially maintained their employment concentration—a measure of their competitiveness—relative to the state average over this period.

Six Targets of Opportunity

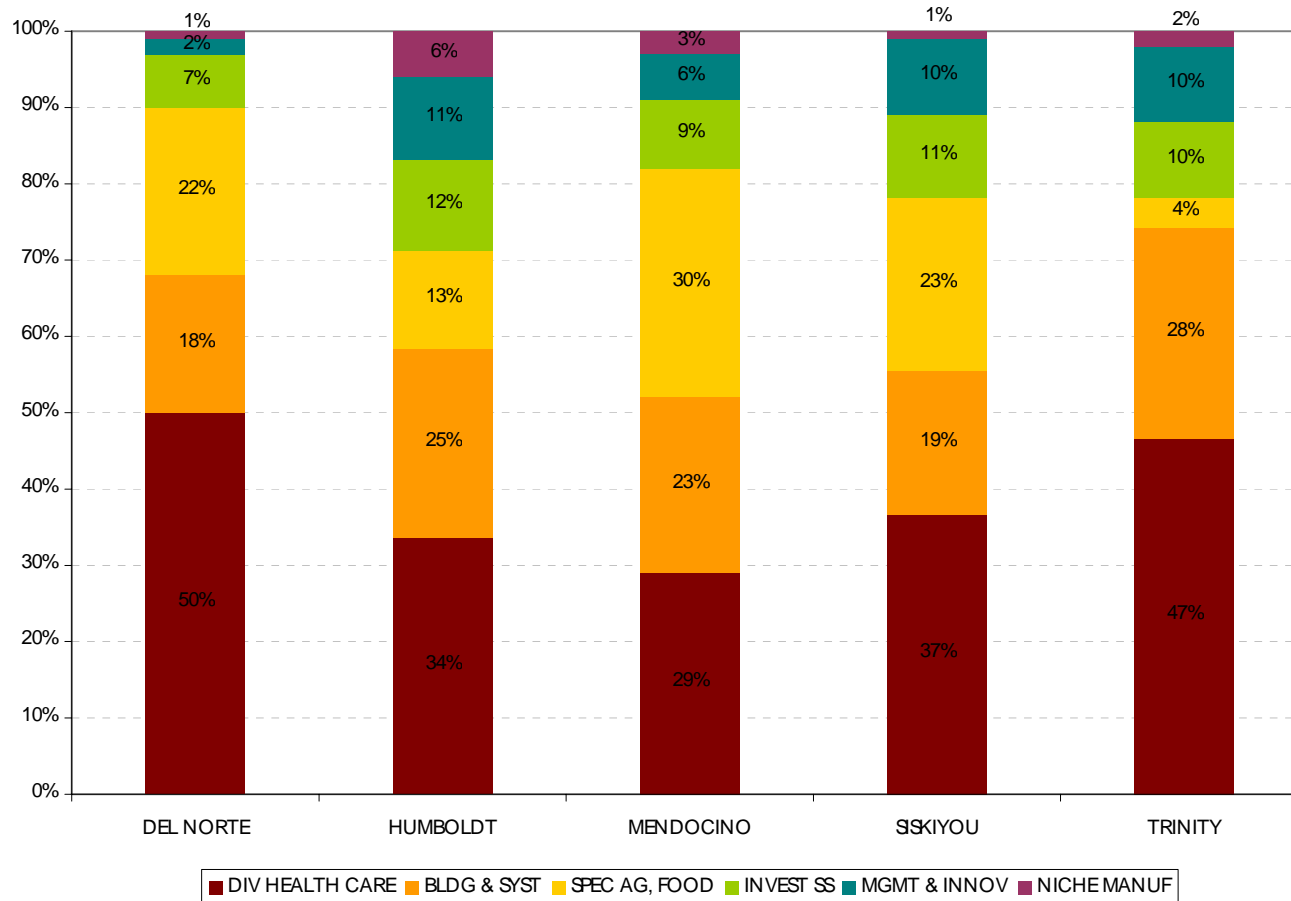
- Five of the six have far outpaced the regional growth rate in establishments. The growth rate in number of firms in Management and Innovation Services (80%), Diversified Health Care (34%), Investment Support Services (22%), Niche Manufacturing (19%), and Specialty Agriculture, Food, and Beverages (11%) are all much greater rate than the regional economy as a whole (1.5%).
- Five of the six offer employment opportunities at the lower, mid, and higher levels of the occupational spectrum. All of them have people working in occupations that are projected to be among the top 50 fastest-growing jobs in the region in the coming decade.
- All of these targets of opportunity have not only a track record of growth, but prospects for future expansion, especially if they can find the skilled talent they need.

Targets of Opportunity are Important to All North Coast Counties



Targets of Opportunity
Share of Total Private Sector Wages by County

Targets of Opportunity are Important to All North Coast Counties



Targets of Opportunity are Important to All North Coast Counties

	DIV HEALTH CARE	BLDG & SYST	SPEC AG, FOOD	INVEST SS	MGMT & INNOV	NICHE MANUF
NORTH COAST REGION	34%	23%	21%	11%	8%	4%
DEL NORTE	50%	18%	22%	7%	2%	1%
HUMBOLDT	34%	25%	13%	12%	11%	6%
MENDOCINO	29%	23%	30%	9%	6%	3%
SSKIYOU	37%	19%	23%	11%	10%	1%
TRINITY	47%	28%	4%	10%	10%	2%

Diversified Health Care

	1990	2004	% Change	Regional Comparison
Employment	7119	10286	45%	8%
Firms	909	1383	34%	1.5%
Wages	\$ 26,874	\$ 33,863	26%	6%
Concentration	1.46	1.42	-3%	N/A

Note: Firms are for the 1990-2003 period

Diversified Health Care

INDUSTRY CODE (NAICS Code)	INDUSTRY SECTOR (NAICSTitle)	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)	
		1990	2004	1990	2004	1990-2004	1990	2003	%Change	1990	2004
6221	General Medical and Surgical Hospitals	2816	3256	\$28,112	\$44,693	1.0%	17	17	0.0%	1.67	1.39
6211	Offices of Physicians	1490	2082	\$38,430	\$40,257	2.4%	292	360	18.9%	1.33	1.48
6241	Individual and Family Services	595	889	\$14,488	\$21,921	2.9%	153	360	57.5%	2.29	1.76
6212	Offices of Dentists	620	731	\$24,770	\$32,756	1.2%	141	139	-1.4%	1.39	1.03
6233	Community Care Facilities for the Elderly	142	682	\$10,387	\$14,468	11.9%	15	8	-87.5%	0.73	1.99
6214	Outpatient Care Centers	293	599	\$28,144	\$36,940	5.2%	20	29	31.0%	1.83	2.01
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	436	521	\$14,323	\$18,318	1.3%	3	6	50.0%	2.23	1.54
6213	Offices of Other Health Practitioners	415	505	\$20,243	\$23,213	1.4%	173	341	49.3%	1.64	1.35
6219	Other Ambulatory Health Care Services	170	331	\$19,873	\$23,032	4.3%	18	22	18.2%	2.22	2.59
6216	Home Health Care Services	87	322	\$19,855	\$20,868	9.8%	8	23	65.2%	0.82	1.11
6239	Other Residential Care Facilities	-	308	-	\$19,908	-	32	49	34.7%	-	2.39
3391	Medical Equipment and Supplies Manufacturing	55	60	\$26,272	\$30,193	0.6%	37	29	-27.6%	0.20	0.19

Diversified Health Care

HIGHER LEVEL

REGISTERED NURSES
FIRST LINE MANAGERS OF ADMIN SUPPORT WORKERS
DENTAL HYGIENISTS
PHYSICIANS/SURGEONS
RADIOLOGIC TECHNOLOGISTS
GENERAL AND OPERATIONS MANAGERS
RESPIRATORY THERAPISTS
ACCOUNTANTS AND AUDITORS

33%

MID-LEVEL

DENTAL ASSISTANTS
LICENSED PRACTICAL/VOCATION NURSES
EXECUTIVE SECRETARIES
MEDICAL ASSISTANTS
MEDICAL SECRETARIES
BOOKKEEPING/ACCOUNTING
PHARMACY TECHNICIANS
CUSTOMER SERVICE REPRESENTATIVES
COMPUTER SUPPORT SPECIALISTS
MEDICAL RECORDS/HEALTH INFO TECHNICIANS

39%

LOWER LEVEL

NURSING AIDES
OFFICE CLERKS
RECEPTIONISTS
HOME HEALTH AIDES
PERSONAL AND HOME CARE AIDES
BILLING AND POSTING CLERKS
MAIDS/HOUSEKEEPING
SECRETARIES
EMERGENCY MEDICAL TECHNICIANS
SOCIAL/HUMAN SERVICE ASSISTANTS

28%

Past and Future Drivers of Growth

- Growing, aging population
- Limited migration for outside health care
- Long-term restructuring to health care alternatives
- Administrative complexity
- Integrated system
- Outward-focused telemedicine
- Niche centers of specialization/excellence
- Mix of accessible, high-quality, affordable care
- Baby boomer retirees with new health “lifestyle” demands

Building & Systems Construction & Maintenance

	1990	2004	%Change	Regional Comparison
Employment	6122	7495	22%	8%
Firms	1883	1807	-4%	1.5%
Wages	\$ 27,199	\$ 31,061	14%	6%
Concentration	1.08	0.97	-10%	N/A

Note: Firms are for the 1990-2003 period

Building & Systems Construction & Maintenance

INDUSTRY CODE (NAICS Code)	INDUSTRY SECTOR (NAICSTitle)	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)	
		1990	2004	1990	2004	1990-2004	1990	2003	% Change	1990	2004
2361	Residential Building Construction	1587	1543	\$ 19,549	\$ 29,218	-0.2%	484	473	-2.3%	2.40	1.79
4441	Building Material and Supplies Dealers	1243	1371	\$ 29,669	\$ 25,501	0.70%	219	166	-31.9%	2.20	1.78
5617	Services to Buildings and Dwellings	614	945	\$ 17,693	\$ 28,230	3.1%	184	241	23.7%	0.69	0.73
2382	Building Equipment Contractors	672	856	\$ 33,939	\$ 38,150	1.7%	284	246	-15.4%	0.78	0.71
2383	Building Finishing Contractors	452	615	\$ 24,894	\$ 28,143	2.2%	173	201	13.9%	0.58	0.54
2373	Highway, Street, and Bridge Construction	381	460	\$ 47,396	\$ 51,110	1.4%	81	60	-35.0%	2.29	2.54
2381	Foundation, Structure, and Building Exterior Contractors	233	451	\$ 19,129	\$ 27,945	4.8%	113	112	-0.9%	0.42	0.47
4442	Lawn and Garden Equipment and Supplies Stores	157	314	\$ 20,831	\$ 23,666	5.1%	64	60	-6.7%	1.40	3.67
2389	Other Specialty Trade Contractors	179	308	\$ 22,565	\$ 28,609	4.0%	157	155	-1.3%	0.54	0.70
2362	Nonresidential Building Construction	382	288	\$ 43,589	\$ 37,482	-2.0%	82	62	-32.3%	0.97	0.67
5622	Waste Treatment and Disposal	132	196	\$ 29,547	\$ 33,947	-	2	3	33.3%	1.40	2.32
2371	Utility System Construction	90	148	\$ 36,757	\$ 42,612	3.6%	40	28	-42.9%	0.46	0.68

Building & Systems Construction & Maintenance

HIGHER LEVEL

CARPENTERS
FIRST LINE MANAGERS OF CONSTRUCTION TRADE
ELECTRICIANS
OPERATING ENGINEERS
GENERAL OPERATIONS MANAGERS
COST ESTIMATORS
ACCOUNTANTS AND AUDITORS

31%

49%

MID-LEVEL

CONSTRUCTION LABOR
CEMENT MASONS AND CONCRETE FINISHERS
PLUMBERS/PIPEFITTERS
DRY WALL/CEILING TILE INSTALLERS
EXECUTIVE SECRETARIES
SHEET METAL WORKERS
FIRST-LINE MANAGERS OF SALES WORKERS
TRUCK DRIVERS (HEAVY AND TRACTORS)
CARPET INSTALLERS
SALES REPRESENTATIVES (WHOLESALE)

LOWER LEVEL

TEAM ASSEMBLERS
SHIPPING AND RECEIVING
PACKERS AND PACKAGERS
LABORERS
HELPERS/PRODUCTION WORKERS
OFFICE CLERKS
ORDER CLERKS
CUTTING, PUNCHING, PRESS OPERATORS
STOCK CLERKS/ORDER FILLERS

20%

Past and Future Drivers of Growth

- Need to replace, repair, and upgrade aging infrastructure and housing stock
- Growing public investment in infrastructure and changes in government regulations, such as seismic upgrades
- Population growth from natural increases, influx of retirees, and affluent residents from other regions attracted to quality of life and able to build or upgrade homes
- Private investment to meet new demand for office and retail space, casinos
- Increases in property values and low interest rates increase ability to upgrade; increased interest in design spurs home remodels
- Continued increases in population, especially in-migration
- Continued need for new and improved infrastructure
- New kinds of housing needs (e.g., elder housing options)
- Growth in green construction practices and materials
- Growth in demand for energy efficient buildings, alternative energy systems

Specialty Agriculture, Food and Beverages

	1990	2004	%Change	Regional Comparison
Employment	4185	5547	33%	8%
Firms	505	564	11%	1.5%
Wages	\$ 19,846	\$ 24,804	25%	6%
Concentration	1.53	1.51	-1%	N/A

Note: Firms are for the 1990-2003 period

Specialty Agriculture, Food and Beverages

INDUSTRY CODE (NAICS Code)	INDUSTRY SECTOR (NAICSTitle)	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)	
		1990	2004	1990	2004	1990-2004	1990	2003	% Change	1990	2004
1113	Fruit and Tree Nut Farming	1274	1373	\$ 13,469	\$ 15,617	0.5%	95	120	20.8%	2.31	2.52
3121	Beverage Manufacturing	856	1030	\$ 25,858	\$ 33,297	1.3%	50	80	37.5%	-	4.28
1114	Greenhouse, Nursery, and Floriculture Production	482	903	\$ 18,117	\$ 22,024	4.6%	35	39	10.3%	2.26	3.88
1151	Support Activities for Crop Production	481	491	\$ 16,528	\$ 22,782	0.1%	30	31	3.2%	0.60	0.48
4452	Specialty Food Stores	298	458	\$ 15,758	\$ 19,159	3.1%	55	64	14.1%	1.33	1.93
4244	Grocery and Related Product Wholesalers	394	333	\$ 27,421	\$ 29,465	-1.2%	120	97	-23.7%	0.97	0.61
3115	Dairy Product Manufacturing	90	308	\$ 33,145	\$ 37,800	9.2%	6	8	25.0%	0.89	2.83
4931	Warehousing and Storage	47	234	\$ 25,163	\$ 31,949	12.1%	33	38	13.2%	0.35	0.58
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	166	197	\$ 32,708	\$ 46,537	1.2%	18	11	-63.6%	1.88	2.31
3119	Other Food Manufacturing	38	139	\$ 39,433	\$ 16,610	9.7%	10	12	16.7%	0.43	0.97
1125	Animal Aquaculture	14	27	\$ 12,665	\$ 17,884	4.8%	8	8	0.0%	2.76	7.40
4245	Farm Product Raw Material Merchant Wholesalers	-	24	\$ -	\$ 28,113	-	13	21	38.1%	-	2.20
3113	Sugar and Confectionery Product Manufacturing	17	20	\$ 7,056	\$ 13,514	1.2%	4	4	0.0%	0.24	0.37

Specialty Agriculture, Food and Beverages

HIGHER LEVEL

SALES REPRESENTATIVES (WHOLESALE)
GENERAL AND OPERATIONS MANAGERS
FIRST LINE MANAGERS OF PRODUCTION WORKERS
ACCOUNTANTS AND AUDITORS

6%

30%

MID-LEVEL

INDUSTRIAL TRUCK AND TRACTOR OPERATORS
TRUCK DRIVERS (HEAVY)
TRUCK DRIVERS (LIGHT/DELIVERY)
DRIVER/SALES WORKERS
MAINTENANCE AND REPAIR WORKERS
INSPECTORS AND TESTERS
CUSTOMER SERVICE REPRESENTATIVES

LOWER LEVEL

FARM WORKERS/LABORERS
LABORERS/FREIGHT MOVING
PACKERS AND PACKAGERS
PACKAGING/FILLING MACHINE OPERATORS
STOCK CLERKS/ORDER FILLERS
CASHIERS
BAKERS
SHIPPING AND RECEIVING
RETAIL SALESPERSONS
FOOD BATCHMAKERS

64%

Past and Future Drivers of Growth

- Growing consumer demand for specialty products, especially those with a “local connection”
- Growth in organic industry
- Product innovation among regional producers
- Internet helps regional producers reach customers outside region
- Demand for specialties will continue to grow
- Future innovations in products, preservation, packaging, flavor, nutritional enhancement, etc.
- Growing North Coast “brand” will act as catalyst across the board
- Improved transportation will enable more and faster shipment of products

Investment Support Services

	1990	2004	%Change	Regional Comparison
Employment	2524	2880	14%	8%
Firms	768	980	22%	1.5%
Wages	\$ 26,701	\$ 32,820	23%	6%
Concentration	0.70	0.68	-3%	N/A

Note: Firms are for the 1990-2003 period

Investment Support Services

INDUSTRY CODE (NAICS Code)	INDUSTRY SECTOR (NAICSTitle)	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)	
		1990	2004	1990	2004	1990-2004	1990	2003	%Change	1990	2004
5221	Depository Credit Intermediation	1060	1155	\$ 25,857	\$ 31,237	0.6%	105	108	2.8%	0.79	1.02
5242	Agencies, Brokerages, and Other Insurance Related Activities	422	462	\$ 30,059	\$ 42,636	0.6%	198	199	0.5%	0.82	0.74
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	387	386	\$ 23,741	\$ 25,443	0.0%	163	239	31.8%	0.59	0.58
5313	Activities Related to Real Estate	254	362	\$ 20,015	\$ 24,710	2.6%	42	59	28.8%	0.65	0.66
5312	Offices of Real Estate Agents and Brokers	231	316	\$ 25,174	\$ 26,736	2.3%	219	244	10.2%	0.97	0.92
5231	Securities and Commodity Contracts Intermediation and Brokerage	137	106	\$ 47,750	\$ 85,376	-1.8%	16	39	59.0%	0.75	0.39
5223	Activities Related to Credit Intermediation	22	51	\$ 26,189	\$ 27,955	6.2%	9	29	69.0%	0.22	0.16
5239	Other Financial Investment Activities	11	42	\$ 8,753	\$ 25,156	10.0%	16	63	74.6%	0.08	0.15

Investment Support Services

HIGHER LEVEL

ACCOUNTANTS AND AUDITORS
LOAN OFFICERS
FIRST LINE MANAGERS OF ADMIN SUPPORT WORKERS
SECURITIES, COMMODITIES, FINANCIAL SERVICE SALES AGENTS
INSURANCE SALES AGENTS
CLAIMS ADJUSTORS/INVESTIGATORS
FINANCIAL MANAGERS
GENERAL AND OPERATIONS MANAGERS
PERSONAL FINANCIAL ADVISORS
SALES REPRESENTATIVES
COMPUTER SYSTEMS ANALYSTS

38%

40%

MID-LEVEL

CUSTOMER SERVICE REPRESENTATIVES
BOOKKEEPING/ACCOUNTING/AUDITING
INSURANCE CLAIMS/POLICY PROCESSING
LOAN INTERVIEWERS/CLERKS
EXECUTIVE SECRETARIES
PROPERTY/REAL ESTATE MANAGERS
BILL AND ACCOUNT COLLECTORS
COMPUTER SUPPORT SPECIALISTS

LOWER LEVEL

TELLERS
OFFICE CLERKS
RECEPTIONISTS
SECRETARIES
COUNTER CLERKS

22%

Past and Future Drivers of Growth

- People with capital moving to region
- Baby boomers coming into inheritances
- Real estate appreciation creates capital for other investments
- CEOs of local firms enjoy quality of life and choose to locate and remain in the region
- Continuing change in population mix to more retirees with investment capital
- Investment advisors working on their own will need staff support for expanded business
- Growth of new businesses creates demand for more commercial investment support services

Management and Innovation Services

	1990	2004	%Change	Regional Comparison
Employment	1095	2466	125%	8%
Firms	562	1011	80%	1.5%
Wages	\$ 30,347	\$ 33,304	10%	6%
Concentration	0.35	0.41	19%	N/A

Note: Firms are for the 1990-2003 period

Management and Innovation Services

NAICS Code	2002 NAICS Title	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)	
		1990	2004	1990	2004	1990-2004	1990	2003	% Change	1990	2004
5511	Management of Companies and Enterprises	91	711	\$ 24,931	\$ 37,302	15.8%	4	9	55.6%	0.32	0.46
5413	Architectural, Engineering, and Related Services	498	551	\$ 35,404	\$ 40,236	0.7%	160	202	20.8%	0.58	0.53
5419	Other Professional, Scientific, and Technical Services	265	400	\$ 14,148	\$ 22,122	3.0%	113	180	37.2%	1.07	1.13
5416	Management, Scientific, and Technical Consulting Services	61	370	\$ 19,439	\$ 31,192	13.7%	132	279	52.7%	0.16	0.47
5417	Scientific Research and Development Services	71	98	\$ 21,388	\$ 30,338	2.3%	18	37	51.4%	0.13	0.16
5415	Computer Systems Design and Related Services	51	97	\$ 40,546	\$ 47,282	4.7%	35	102	65.7%	0.12	0.09
5611	Office Administrative Services	53	94	\$ 88,421	\$ 37,675	4.2%	8	37	78.4%	0.25	0.28
5414	Specialized Design Services	5	55	\$ 24,528	\$ 35,385	18.7%	73	105	30.5%	0.04	0.36
5181	Internet Service Providers and Web Search Portals	-	48	\$ -	\$ 30,345	-	5	28	82.1%	-	0.27
5182	Data Processing, Hosting, and Related Services	-	42	\$ -	\$ 27,213	-	14	32	56.3%	-	0.31

Management and Innovation Services

HIGHER LEVEL

COMPUTER SOFTWARE ENGINEERS, APPLICATIONS
GENERAL AND OPERATIONS MANAGERS
COMPUTER SOFTWARE ENGINEERS, SYSTEMS SOFTWARE
MANAGEMENT ANALYSTS
COMPUTER PROGRAMMERS
CIVIL ENGINEERS
ACCOUNTANTS/AUDITORS
COMPUTER SYSTEMS ANALYSTS
COMPUTER INFORMATION SYSTEMS MANAGERS
ENGINEERING MANAGERS
ENVIRONMENTAL SCIENTISTS

83%

17%

MID-LEVEL

COMPUTER SUPPORT SPECIALISTS
ARCHITECTURAL AND CIVIL DRAFTERS
MARKET RESEARCH ANALYSTS
GRAPHIC DESIGNERS
ENVIRONMENTAL SCIENCE/PROTECTION TECHNICIANS

LOWER LEVEL

VIRTUALLY NO LOWER LEVEL OCCUPATIONS, EXCEPT FOR ENTRY-LEVEL
JOBS FOR MID LEVEL OCCUPATIONS

<1%

Past and Future Drivers of Growth

- Talented professionals moved to region for quality of life reasons
- Humboldt State graduates chose to remain and create or work in these kind of firms
- Internet has enabled firms to remain here and interact globally
- Growth in information technology use across all industries has fueled demand for technical consulting
- Specialties have grown up around region's unique location and assets (e.g., environmental consulting)
- Expand to serve more businesses within the region
- Reach out to fast-growing global markets
- As more talent migrates to region, more of these firms will start up and expand
- New areas of innovation—alternative energy, natural resource economics—can open up new frontiers for exportable expertise

Niche Manufacturing

	1990	2004	%Change	Regional Comparison
Employment	1517	2022	33%	8%
Firms	460	548	19%	1.5%
Wages	\$ 27,023	\$ 33,824	25%	6%
Concentration	0.39	0.53	35%	N/A

Note: Firms are for the 1990-2003 period

Niche Manufacturing

INDUSTRY CODE (NAICS Code)	INDUSTRY SECTOR (NAICS Title)	Regional Employment		Regional Average Annual Wage		Average Annual Growth Rate	Total Establishments			Regional Employment Concentration (relative to CA)		
		1990	2004	1990	2004	1990-2004	1990	2003	%Change	1990	2004	
	Fabricated Metal Product											
332	Manufacturing Paint, Coating and Adhesive Manufacturing/Plastics Product	530	659	\$ 34,534	\$ 33,958	1.60%	81	105	22.9%	0.53	0.73	
	Electrical and Electronics Goods and											
4236/4239	Miscellaneous Durable Goods Merchant Wholesalers	296	386	\$ 32,987	\$ 30,287	1.9%	91	90	28%	0.33	0.47	
	Manufacturing/Clay Product and											
325/326/327	Refractory Manufacturing/Glass and Glass Product Manufacturing	290	380	\$ 28,588	\$ 33,451	1.9%	77	104	35%	0.24	0.31	
	Electronic Shopping and Mail-Order Houses											
4541	Electronic Shopping and Mail-Order Houses	199	252	\$ 15,646	\$ 31,856	1.7%	46	42	-10%	2.74	2.03	
	Other Miscellaneous Manufacturing											
3399	Other Miscellaneous Manufacturing	100	194	\$ 20,390	\$ 43,649	0.0%	86	110	22%	0.40	0.73	
	Medical Equipment and Supplies Manufacturing											
3391	Medical Equipment and Supplies Manufacturing	55	60	\$ 26,272	\$ 30,193	0.6%	37	29	-28%	0.20	0.19	
	Electronic and Precision Equipment Repair and Maintenance											
8112	Electronic and Precision Equipment Repair and Maintenance	47	46	\$ 24,468	\$ 40,881	-0.2%	59	54	-9%	0.53	0.56	
	Agriculture, Construction, and Mining Machinery Manufacturing											
3331	Agriculture, Construction, and Mining Machinery Manufacturing	-	45	-	\$ 31,649	-	6	10	40%	0.00	1.35	

Niche Manufacturing

HIGHER LEVEL

SALES REPRESENTATIVES (WHOLESALE)
FIRST LINE MANAGERS OF PRODUCTION WORKERS
GENERAL AND OPERATIONS MANAGERS
FIRST LINE SUPERVISORS OF SALES WORKERS
SALES REPRESENTATIVES
ACCOUNTANTS AND AUDITORS

20%

MID-LEVEL

MACHINISTS
CUSTOMER SERVICE REPRESENTATIVES
INSPECTORS AND TESTERS
BOOKKEEPING/ACCOUNTING
WELDERS
MAINTENANCE/REPAIR WORKERS
ASSEMBLERS/FABRICATORS
COATING/PAINTING/SPRAYING
TRUCK DRIVERS (LIGHT/DELIVERY)
TRUCK DRIVERS (HEAVY)
SHEET METAL WORKERS
COMPUTER SUPPORT SPECIALISTS

50%

LOWER LEVEL

TEAM ASSEMBLERS
SHIPPING AND RECEIVING
PACKERS AND PACKAGERS
LABORERS
HELPERS/PRODUCTION WORKERS
OFFICE CLERKS
ORDER CLERKS
CUTTING, PUNCHING, PRESS OPERATORS
STOCK CLERKS/ORDER FILLERS

30%

Past and Future Drivers of Growth

- Entrepreneurs stay for quality of life, and build a niche business
- Small firms focus on small, high-value areas, and make a commitment to quality and innovation at reasonable cost
- Internet has helped expand market reach
- Large institutional markets or government policies have stimulated growth in some cases
- Growing demand for customized, specialty products in wide variety of industry and consumer markets
- Growing need for agile, specialized machining, engineering, and manufacturing or rapid prototyping
- Growing government-driven markets (e.g., pollution control equipment)
- Innovative designs (e.g., decorative glass)

Conclusions

- The North Coast targets of opportunity include about 70 high-performing industry sectors, selected from among hundreds of sectors across the five-county economy.
- These sectors have demonstrated over a 15-year period that they have staying power: they grew even after the ups and downs of several business cycles.
- They represent a sustained, structural shift in the North Coast economy: targets of opportunity have emerged as other areas of the economy have receded.

Conclusions

- Together, they now directly account for more almost 40% of private sector employment and more than half of private sector wages—and their impact is much greater as the employees and firms in these sectors buy other goods and services in the region.
- Quality of life keeps entrepreneurs and companies rooted—and attracts others
- These firms and industries need more workers to grow—and are having trouble finding them

Implications

- Further explore and engage targets of opportunity
 - The numbers and focus groups gave us an initial window into these areas—a good start
 - We need to find out more about the specific and changing needs of these firms and industries--and what the region can do to support their growth
 - We need to make sure the region understands the changing North Coast economy

Implications

- Prioritize and align workforce and economic development resources, and other infrastructure investments, to high-performing targets of opportunity
 - Entrepreneurship and innovation
 - Career progressions
- Foster collaboration within and among targets of opportunity
 - Marketing/branding, transportation in Specialty Ag
 - Entry-level production workers in Niche Mfg, Specialty Ag
 - Youth career awareness (all targets of opportunity)

the north coast

the counties of del norte, humboldt, mendocino, siskiyou and trinity



Targets of Opportunity
January 31, 2007