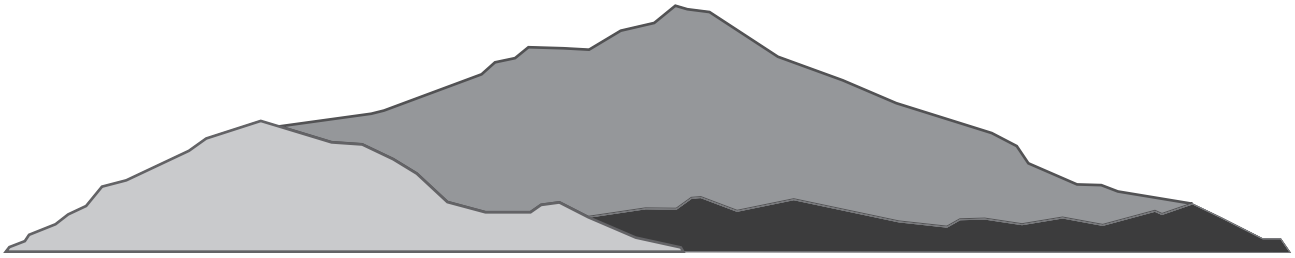
Marin Profile



A Survey of Economic, Social Equity, and Environmental Indicators

Marin Economic Commission
November, 2009

Marin Economic Commission
2008 - 2009

The Marin County Board of Supervisors established the Marin Economic Commission in 1993 to develop economic policies and programs for the Marin Countywide Plan and to promote economic vitality countywide.

The Commissioners have updated the Economic Element of the recently adopted Marin Countywide Plan and are currently engaged in a process to implement these and other programs identified in the Targeted Industries Study and Supplement.

The Commission works on implementing the policies and programs included in the Economic Element, informing the Board of Supervisors on matters of economic vitality, and on promoting economic activities and disseminating information about Marin County's economy to the public in Marin and the Bay Area.

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Marin County Community Development Agency

Brian Crawford
Director

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Project Manager

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Summary

Introduction:

This is the seventh biennial edition of Marin Profile, which started in 1997 with economic and social indicators and then added several environmental indicators beginning in 1999. This edition of the Profile contains annualized data through 2008, as available. While many of the social indicators have continued on similar trend lines over the study period, economic and other indicators have shown declines as a result of the impacts of the nation's economic recession. However, with one of the lowest unemployment rates in the State, the recession has not impacted Marin as greatly as other Bay Area counties. While Marin has withstood many economic challenges of the past, in comparison the County has and continues to be a desirable place to live and work.

Marin continues to grow slowly and, given the more rapid population increase elsewhere in the Bay Area in comparison, its share of the regional population continues to decrease. Despite its slower growth rate, Marin is slowly becoming more ethnically diverse although it is far less diverse than the Bay Area as a whole. Household size continues to remain relatively stable and is not expected to change over the next twenty years. Overall, Marin residents continue to have a higher level of education and spend much more on per pupil on education compared to the Bay Area or the State; they are also politically active. Performance on standardized tests exceeds similar results from other areas, although scores have recently dipped. However, most students go on to college while the dropout rate remains below 5%. Crime rates are low and, except for juvenile misdemeanor rates, are well below state averages.

Marin residents continue to have the highest average per capita income in the State with a substantial portion derived from sources other than wages, such as from dividends, interest, and rental income. Household income is also high and continues to increase at a faster rate than the rest of the Bay Area. While per capita income in Marin experienced a downturn in 2003, it has since rebounded and surpassed previous highs by 2006. Although Marin's unemployment rate recently reached a new high of 7.5%, it remains well below the region, State, and nation. However, many of the higher-paying jobs that employ Marin residents are located outside of the county.

Despite Marin's high per-capita income, many employment opportunities in the county are in the lower-paying retail trade, food service and accommodation, and personal services sectors. Commuting patterns indicate many of the workers holding these jobs commute from outside the county where they can find affordable housing to match their wages or, alternatively may choose to live in overcrowded conditions locally. Moderate wage earners such as teachers and public safety personnel, as well as doctors and medical support workers, may still struggle to purchase a home. While home prices have fallen from previous record high levels, the divide between rental and owner-occupied housing costs continues to widen. Social service programs continue to assist lower income households with services but have had difficulty maintaining funding for these programs as government related programs are either reduced or eliminated. Despite funding challenges and occasional local opposition, many affordable and workforce-targeted housing developments have been constructed. Housing construction has still not kept pace with demand, and single-family detached units are still the most prevalent type of housing. However, the number of apartment units as a share of all units is slightly on the rise, which contribute to the stock of housing more likely to be affordable to lower income households.

Marin has made significant progress on protecting substantial amounts of the county's land area with 84% of the land area designated as either public parkland and open space, protected watershed, or agriculture. While

fuel consumption is on the decline, the total number of vehicle registrations is increasing as well as per capita vehicle miles traveled. While Marin enjoys good air quality, vehicles are its primary source of air pollution which is exacerbated by continued congestion. However, overall vehicle emissions have improved considerably despite the increases in traffic congestion and vehicle miles traveled due to improved technologies. With regards to water consumption, both residential and nonresidential water consumption is on the decline. Waste generation, which peaked in 2004, is on the decline as well. Meanwhile, Marin is dependent on mostly non-renewable sources for its energy needs.

Construction of new retail and industrial square footage modestly increased, while their respective vacancy rates rose. Meanwhile, new office construction has declined considerably. High office vacancy rates and the economic downturn have reduced the demand for new office projects. Office vacancy rates are at their highs

Business growth and employment have seen mixed results. As of 2006, the overall number of businesses and employment has declined while wages have shown slight gains. Businesses employing fewer than twenty workers still comprise a majority of business establishments at just over 90%. For individual sectors, the enterprise management, construction, professional and technical services, real estate, and arts and entertainment sectors have all seen increases in both employment and the number of businesses while the information services, manufacturing, and repair service sectors have all declined. Some sectors, such as finance and insurance, health care, transport and warehousing, and motion picture production have seen increases in the number of businesses but decreased or flat employment. Most sectors saw wage increases at or above inflation except for the administrative services, real estate and leasing, and motion picture production sectors. Technology sector employment saw considerable declines, with the hardware and peripherals component rapidly becoming non-existent in Marin. Software, internet services, and the like have also declined, with employment sinking below 1994 levels. However, agricultural production is improving and the organic and value-added components of that sector have seen significant gains in acreage and activity.

While Marin has many qualities that are attractive to businesses, various factors, such as high housing costs and traffic congestion, cause many businesses to locate outside of the county. Historically, as companies have moved on, others have come in to replace them. Although there are challenges with high commercial vacancies, Marin's downtown areas have witnessed a renaissance that has led to substantial public and private investment, commercial activity, and mixed use, transit oriented infill housing that has attracted some business sectors to locate close to transportation and services.

By 2007, the "housing bubble" appeared to burst as a result of rising mortgage defaults. Home prices in Marin (and much of the Bay Area) dipped by 2008, although remained above 2004 levels. Rising interest rates and more stringent mortgage lending standards helped push home sales to record low levels in 2008. As rising home foreclosures displaced families, many families have sought out rental housing, which in turn pushed rental rates to new highs in 2009. While many families have been able to move into home ownership or upsize because of record-low interest rates and more favorable lending standards, many renters continue to be priced out of the housing market. Marin's shortage of affordable housing will continue to exacerbate extended commute trends, traffic congestion problems, and their respective environmental health and quality of life impacts. To the extent that 'smart growth' concepts can be incorporated into Marin's development philosophy, reasonable commercial growth opportunities can be provided by taking advantage of existing infrastructure and community fabric while minimizing impacts to environmental resources to improve Marin's quality of life.

Organization of the Profile:

Each of the topics covers a particular aspect of the economic, social equity, and/or environmental characteristic of Marin County and features charts and brief highlights of the most significant points. The relevance of each topic and data is also discussed. The information contained in this report covers the cities and towns as well as unincorporated areas. Detailed tables are included in the appendix for those wishing more specific information and are ordered in the same sequence as the topics. The information presented in this report reflects the most current data available at the time of publication of this report and thus may not reflect 2009 conditions.

MAKING THE CONNECTIONS: THE THREE E'S OF SUSTAINABILITY

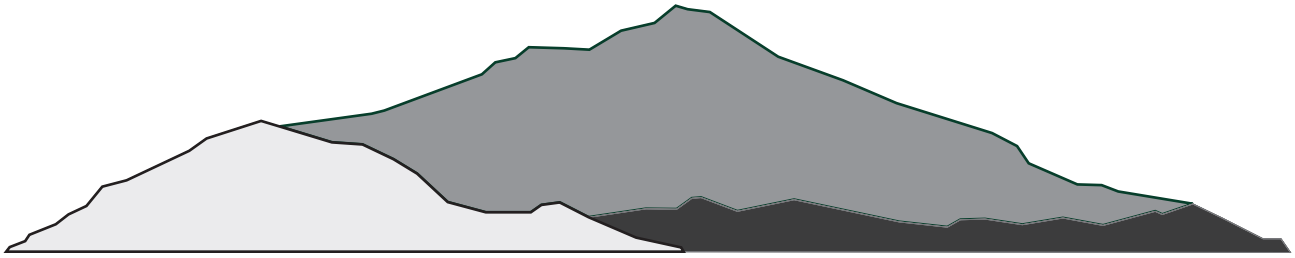
Historically, people have wanted to monitor changes in their community. Often median income, housing prices, or other statistics are used to characterize a region. Some, such as education statistics, may have a dramatic impact upon where people choose to live. Typically these statistics are evaluated one at a time, depending upon the issue in question.

Economic indicators such as median household and per-capita income, GNP, and tax revenues have been used throughout the 20th century. During the 1960s, indicators that measure social progress and environmental health became more popular. These include racial diversity, homelessness, species diversity, air quality, level of education, and many others. Recently, however, the relationship between economic indicators, which developed during the early part of this century, and environmental and social indicators, which emerged during the 1960s, have become clearer.

The concept of sustainability provides a framework for evaluating both individual indicators and their relationships to others. Community issues are grouped into the three "E's" – Economy, Environment, and Social Equity. Often the issues overlap. For example, housing construction leads to lower unemployment (economy), but may also convert some productive agricultural lands or wildlife habitats (environment) into urban environments. Conversely, strict conservation measures may result in fewer construction-related jobs, and drive up housing costs that financially exclude some segments of the population (social equity).

The "Three E" concept has been diagrammed a number of ways to illustrate the relationship between the economy, environment, and social equity, whether as a Venn Diagram giving each "E" equal standing and how having a particular issue or indicator fall within the overlapping areas of the diagram (where either two or three "E"s are met) is the ideal to strive for. It has also been diagrammed as a pyramid and transect to illustrate different approaches and the varying opinions on what sustainability really is and means.


Socioeconomics
Built Environment
SUSTAINABILITY
Natural Systems and
Agriculture



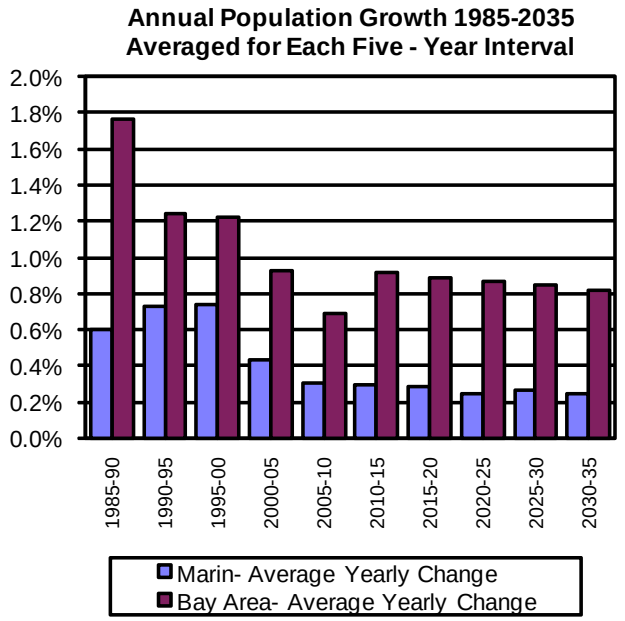
Marin Profile

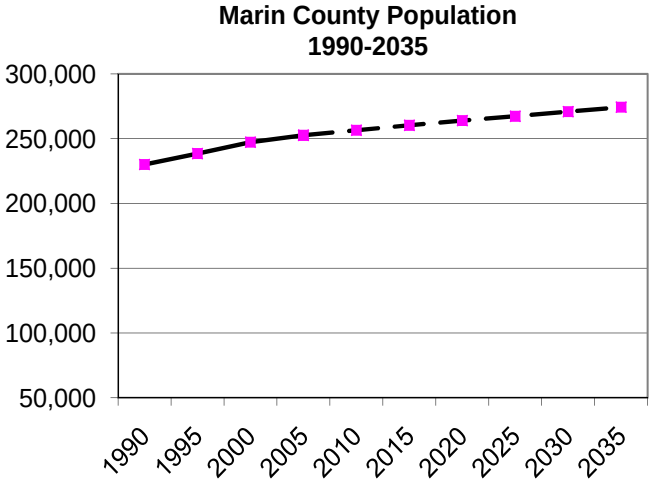
Marin Continues to Grow, but Slowly

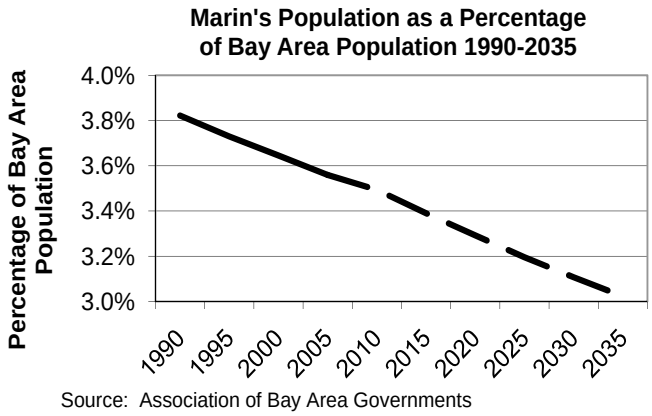
According to the Association of Bay Area Governments (ABAG), the population of Marin County increased 9.8% from 230,096 in 1990 to 252,600 in 2005. As of January 2009, the California Department of Finance (May, 2009) estimates the population at 258,618. Further, ABAG estimates that the population will further increase 8.6% between 2005 and 2035 to 274,300. Marin's growth rate between 1995 and 2005 has been relatively stable at approximately 0.6% annually, one of the lowest levels in the state. Marin's growth rate is projected to decline to 0.3% between 2005 and 2010. However, the greatest projected population increase is expected to occur in this period. Marin's population as a portion of the Bay Area decreased from 3.7% in 1995 to 3.5% by 2009 and is projected to further decline to 3% of the Bay Area's population by 2035. While the growth rate of the Bay Area has been significantly higher than in Marin, the Bay Area's annual growth rate began declining in 1995, but is projected to consistently stay above Marin's annual rate.

What this means:

Increases in population will alter the character, environment, and economy of local communities and the county as a whole. Additional growth requires sound physical and economic planning to ensure that the county remains an attractive place to live and work. A modest growth rate improves the ability to plan for services and facilities, but is also indicative of the lack of available land for new residential development since most of the area is built out. As a result, most growth will occur on smaller infill sites.







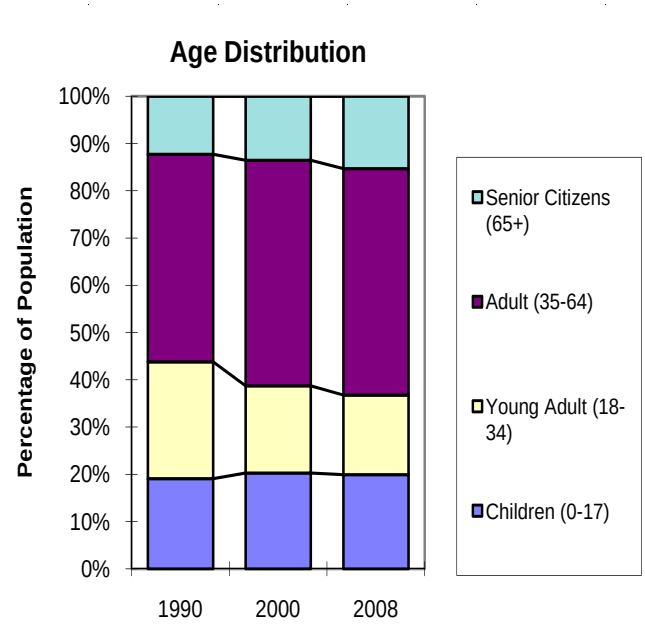
Source: Association of Bay Area Governments

Marin Continues to Age, Senior and Child Population Increasing

The population of Marin has aged significantly since 1980 when the median age was 33.6 years. By 1990 the median age increased to 38.0 years and increased again to 41.3 years in 2000. By 2008, the median age jumped to 46.5.

The number of children (age 0-17) in the county increased from 19% in 1990 to 20.3% in 2000. However, by 2008, this group slightly decreased to 20%. Although young adults (age 18-34) composed 24.7% of the population in 1990, this group fell to 18.5% in 2000 and further declined to 16.8% in 2008. The adult (age 35-64) share of the population was 44% in 1990 before rising to 47.7% in 2000. This proportion slightly increased to 48% by 2008.

Senior citizens (age 65+) as a group have increased significantly from 9.7% of the population in 1980 to 12.2% in 1990 to 13.5% by 2000. In 2008, this age group grew to 15.3% of the population. While 1980-2000 data is derived from the decennial U.S. Census, 2008 data is derived from Claritas, a private research firm that creates updated estimates based on 2000 Census data.



Sources: U.S. Census Bureau (1990,2000), Claritas (2007)

What this means:

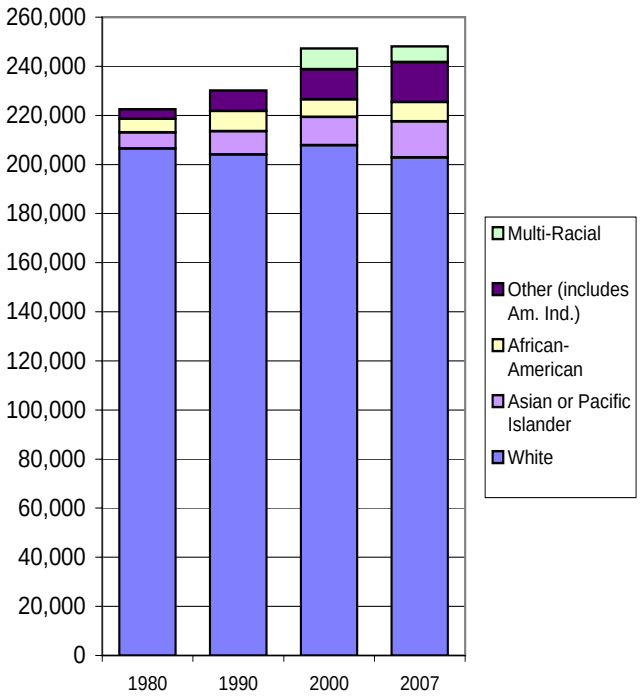
The age distribution of the population has significant effects on schools, social services, the available workforce, and the economy. With an increasingly older population in the county, more health care facilities are required. However, with the recent increase in the school age population, additional funding needs will now impact both ends of the age spectrum. Further, the rising number of retired seniors on fixed incomes indicates that the County's workforce is shrinking. Overall, the decreasing number of young adults suggests that there are relatively few high-paying entry-level jobs needed to pay for higher local housing and living costs.

Racial Diversity Lacking but Increasing as Marin Grows

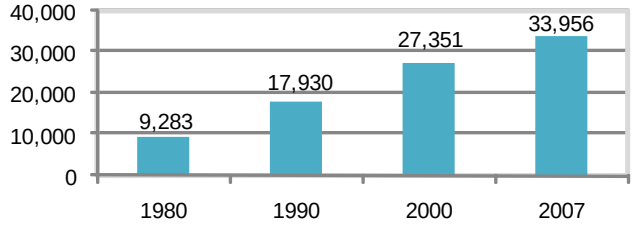
Although Marin County has a predominantly white population, that share of the population decreased from 92.8% in 1980 to 88.7% in 1990 to 84% in 2000. By 2007, the share further decreased to 81.8% to 202,905. Asian/Pacific Islanders increased from 2.9% of the population in 1980 to 4.1% in 1990 to 4.7% in 2000. By 2007, the percent of Asian/Pacific Islanders grew to 6% from 11,591 in 2000 to 14,596. The African-American share of the population increased from 2.5% in 1980 to 3.6% in 1990. Decreasing back down to 2.9% in 2000, they grew to 3.2% of the population by 2007. Persons whom reported themselves as "some other race" increased from 1.3% in 1980 to 3.3% in 1990, then to 4.5% in 2000. By 2007, their proportion grew to 6.2% of the total population.

The 2000 Census and 2007 American Community Survey allowed respondents to claim more than one race. There were 8,579 multi-racial persons in Marin in 2000 or 3.5% of the population. By 2007, this proportion decreased to 2.6% to 6,464 people. The composition of Marin's population differs significantly from that of the Bay Area's population. In 2007, the population was 56.7% white, 21.8% Asian and Pacific Islander, 7% African-American, 9.8% other races, and 3.6% multi-racial. Persons of Hispanic origin (who can be of any racial group) represented only 4.2% of the total population in Marin in 1980 but jumped to 7.8% in 1990, which then increased to 11.1% in 2000. By 2007, this proportion increased to 13.7% or 33,956 people. In comparison, 21.6% of the total Bay Area population was of Hispanic origin in 2007.

Population Growth and Racial Distribution 1980-2007



Persons of Hispanic Origin 1980 - 2007



Source: U.S. Census Bureau

What this means:

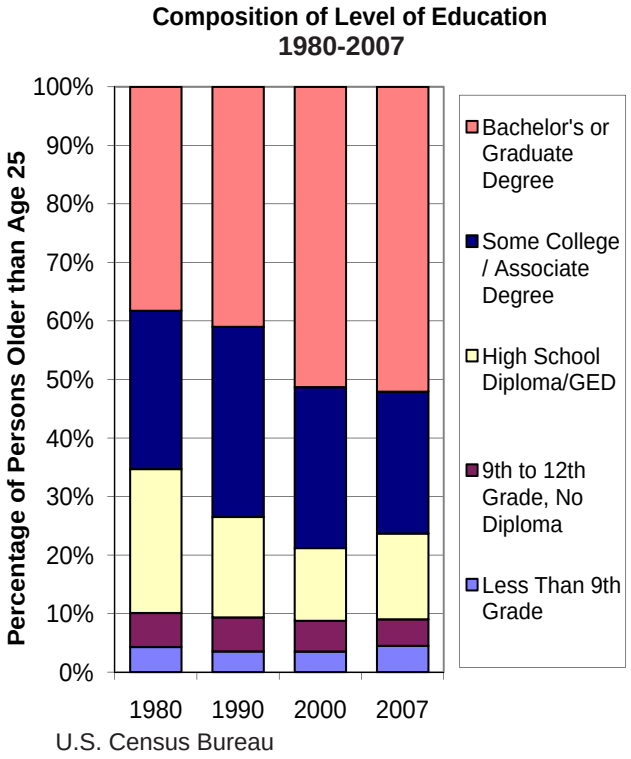
Change is gradually occurring in the ethnic makeup of Marin's population. While the population is becoming more diverse, Marin County is diversifying at a much slower rate than the Bay Area or California. A combination of factors may be influencing this including housing costs and disparity in education levels, which in turn affects employment potential. The intergenerational transfer of wealth may also contribute to some being able to stay in Marin while others without such benefits face greater challenges in affording to live here.

Note: While 1980-2000 data is derived from the decennial U.S. Census, 2007 data is based on one-year estimates (specifically the 2007 calendar year) from the American Community Survey.

Marin's Residents Becoming more Educated

The level of education of Marin residents age 25 and older has increased considerably between 1980 and 2000. The percentage of residents with less than a high school degree has been slowly shrinking from 10% in 1980 to 8.8% in 2000. However, this increased to 9% in 2007. Residents receiving a high school diploma or GED certificate without continuing to college also decreased from 24.6% in 1980 to 12.4% in 2000. By 2007, the proportion slightly rose to 14.7%.

27% of the population had either "some college experience/associate degree" in 1980, which increased to 32.5% in 1990 and then dropped back to 27.5% in 2000. By 2007, the proportion again declined to 24.2%. The total number of residents with a bachelor's or graduate degree increased from 38.3% of the population in 1980, to 41% in 1990, and finally to 51.3% in 2000. As of 2007, 52% of the population has received a bachelor's or graduate degree.



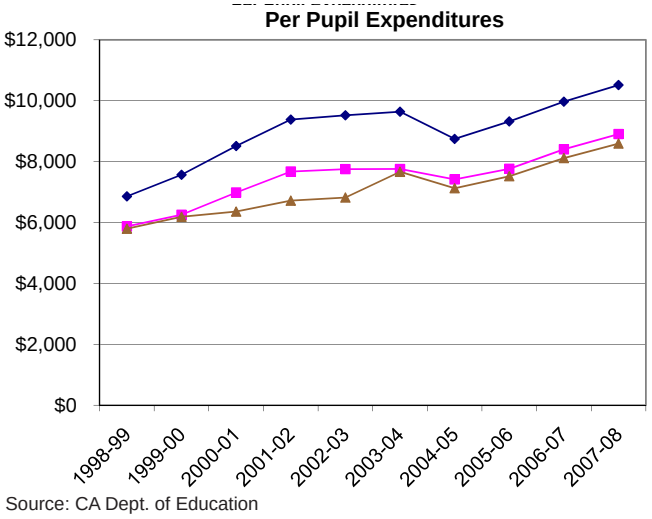
What this means:

Studies have shown that persons with college degrees tend to command higher wages compared to those who do not. Marin's median wage and income figures are the highest in, and increasing at a faster rate than the state. From a statistical standpoint, the high cost of living in Marin means persons with a lower level of education tend to have greater difficulty finding housing affordable at their income level. Additionally, the level of education of the local workforce influences what types of businesses can be staffed from the local labor pool. Employment growth in Marin over the last decade has been primarily in finance and specialized technology which requires a college-level education and in the service and retail industries which typically do not. Jobs requiring a college education can generally be staffed from the local labor pool while jobs that do not require a college education increasingly utilize workers from other counties.

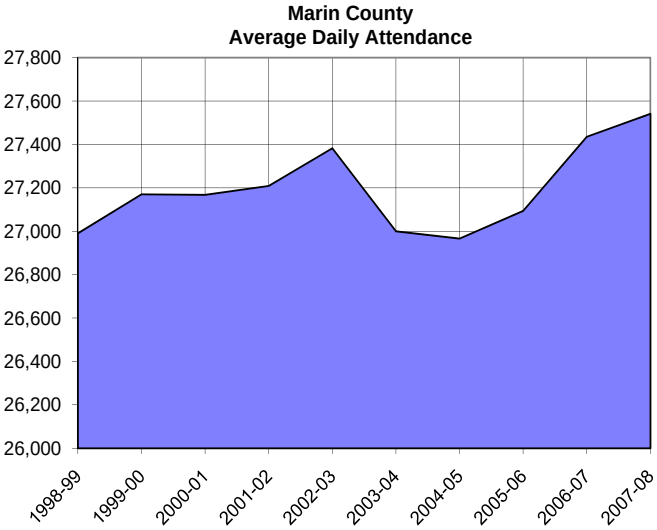
Note: While 1980-2000 education data is derived from the decennial U.S. Census, 2007 education data is derived from the American Community Survey one-year estimates (2007 calendar year).

Marin's Per-Pupil Expenditures Continue to Outpace the Bay Area and State

Since 1998, per pupil expenditures in Marin County has exceeded similar per pupil spending compared to the Bay Area and the State. Per-pupil expenditures were $6,857 during the 1998-99 school year, which were $985 above the Bay Area average and $1,060 above the State average. By the 2000-01 school year, Marin's per-pupil expenditures reached $9,380, which was $1,705 above the Bay Area average and $2,661 above the State average. By the 2005-06 school year, Marin County per-pupil expenditures exceeded both the Bay Area and the State averages by roughly $1,500. Although Marin's overall per-pupil expenditures are high, there are instances of significant deviations from the average. For example, Novato Unified is consistently closer to the state average while Sausalito Elementary is significantly higher than Marin's average.



Source: CA Dept. of Education



Source: CA Dept. of Education

Average Daily Attendance (ADA) is used to calculate how much funding a school receives from its district according to established revenue limits per pupil. It is calculated by dividing the total number of days of student attendance by the total number of school days. ADA was 26,991 in 1998-99 and 27,383 by 2002-03, an increase of 392 students during the period. Since then, ADA slightly decreased to 27,094 in 2005-06.

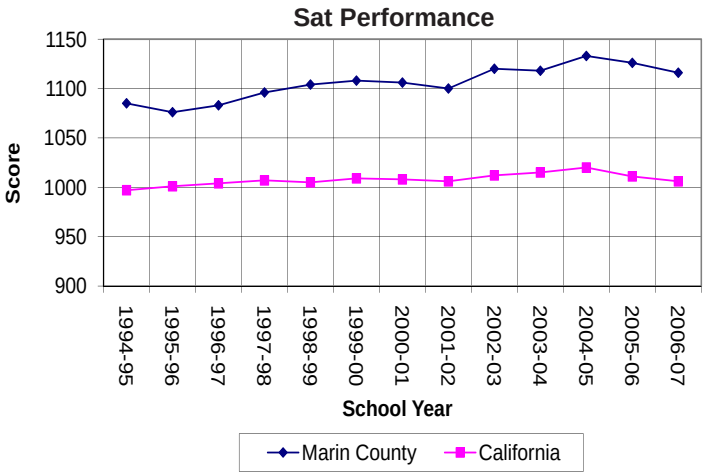
What this means:

Per pupil expenditures are indicative of the local level of investment in education and the future. The inadequacy and age of many school facilities and instructional materials is frequently cited as one reason why public education has declined. Marin is fortunate in that many communities have passed parcel taxes to provide additional funding for local schools. Continued investment in schools is necessary to prepare Marin's youth for an increasingly competitive workforce, especially for jobs in Marin.

When school enrollment declined in Marin in the 1980's, several schools were closed and either leased out or sold to private schools or other organizations. If enrollment were to increase again, some of these schools will need to be reopened, thus displacing lessee private schools or other organizations. Construction of new schools is challenging at best due to the amount of land needed for school facilities coupled with the lack of available land in Marin.

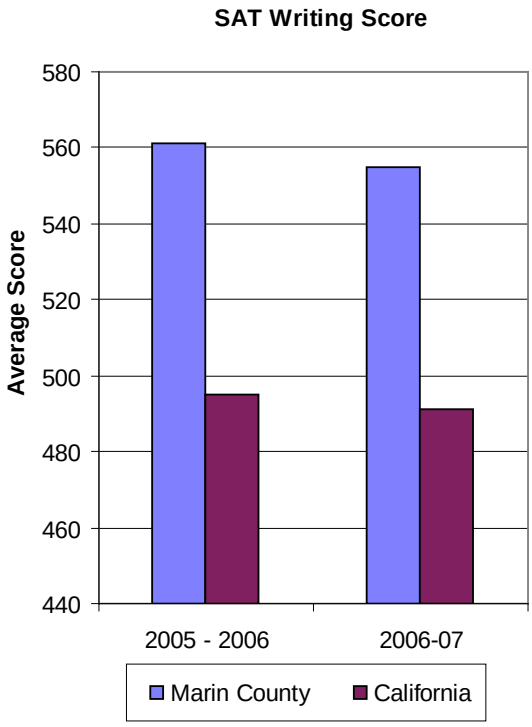
SAT Scores Dip Over Two Years, but are Well Above State Average

Average Combined Standardized Achievement Test (SAT) Scores for Marin increased 31 points from 1,085 in 1994-95 to 1,116 in 2006-07. Combined scores decreased from 1085 in 1994-95 to 1,076 in 1995-96, and from 1,108 to 1,100 between 1999-2000 and 2001-02 but have otherwise shown gains every year. A new record high was achieved by Marin County students during the 2004-2005 school year with an average score of 1,133, which has since decreased to 1,116 in 2006-07.



California as a whole has also shown overall improvements in both verbal and math SAT scores, increasing from 997 in 1994-95 to 1,006 in 2006-07. Although Marin observed a greater drop in scores than California during the 2001-02 school year, scores still remain nearly 11% above the state average. Overall, Marin's scores increased 3% since 1994-95 while state averages have increased only 1% during the same period.

In March 2005, the SAT format was revised to include a writing score in addition to the verbal and math scores. The SAT is now comprised of three sections; Critical Reading (previously called Verbal), Mathematics (previously called math), and Writing. Each section is on a 200-800 scale used previously, however the total possible score is now 2,400 (compared to 1,200 previously due to the addition of the Writing portion).



Source: CA Dept. of Education

Marin County students scored an average of 555 during the 2006-07 school year on the Writing section (out of 800 possible), which is down from 561 from the 2005-06 school year. The State average writing score was 491 in 2006-07, 11.5% below Marin's score.

What this means:

The SAT is the most widely used college entrance examination. SAT scores are often used as a measure of the quality of education in preparing students for college. A well-educated workforce will have more employment options and have the skills necessary to readily fill jobs available in the county and region. Marin's continued high average scores are indicative of its students being better prepared for postsecondary studies than for the State as a whole.

Dropout Rate Continues to Decrease and is One-Fifth the State Average

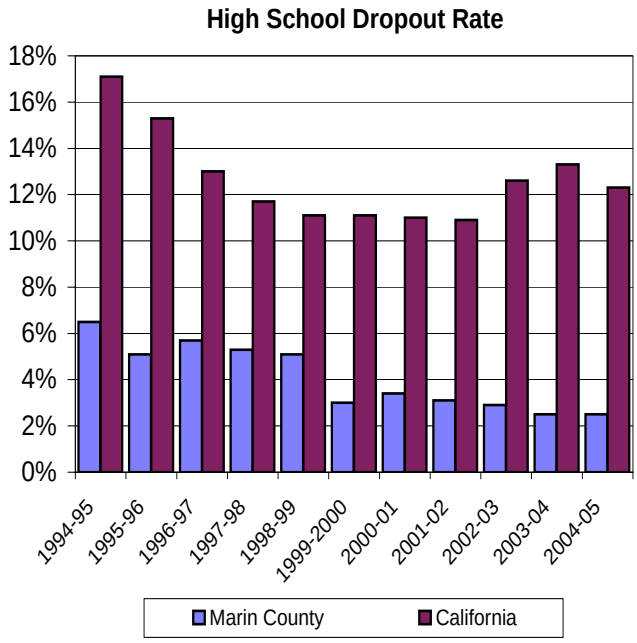
Marin's drop out rate in Marin was highest in the 1994-95 school year at 6.5% then varied between 5.1% and 5.7% through to the 1998-99 school year. Afterward, the rate dropped to the low 3% range to the 2002-03 year. Marin students achieved an all time low dropout rate of 2.5% by the 2003-04 school year and continued through the 2004-05 year. The dropout rate increased for the first time since 1996-97 to 4.3% in the 2005-06 school year before falling to settle at 3.9% in 2006-07.

The state also saw a significant and consistent decrease in the dropout rate from 17.1% in the 1994-95 school year to 10.9% in the 2001-02 school year. State dropout rate increased to 13.3% in the 2003-04 school year before slightly dipping in the 2004-05 school year. Finally, the dropout rate shot up to 16.8% by the 2006-07 school year

Drop out rate data is derived from the 4-year derived dropout rate, which is an estimate of the percent of students who would drop out in a four year period based on data collected for a single year. (Source: California Department of Education)

What this means:

Persons who drop out of high school face significantly limited employment opportunities, even for positions that traditionally have not required a high school diploma. The level of education of the workforce is a determining factor on what types of business and industry can be supported and staffed from the local labor pool as opposed to recruiting outside the county. Marin needs to maintain high educational standards and offer alternatives to dropping out to ensure that the workforce will be competitive for available jobs in the county and region and reduce demand on basic social support services.



Source: California Department of Education

Crime Rates Remain Low, but Property Crime Rates More Variable

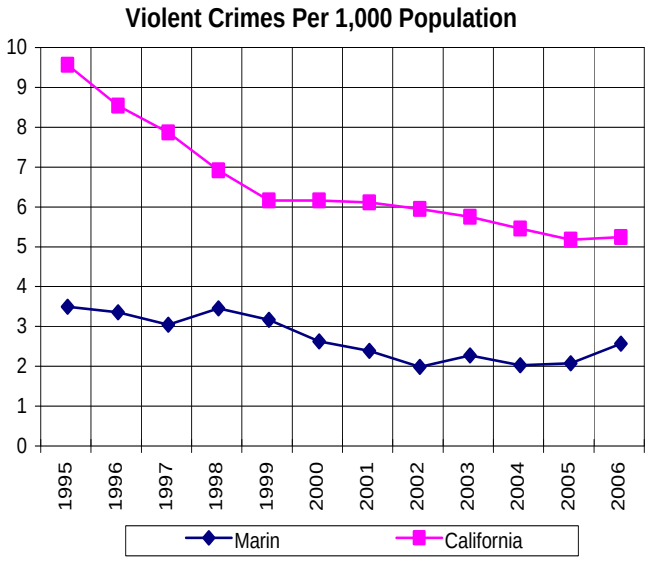
Crime rates in Marin have remained relatively low over the last decade compared to the State as a whole. In 1995, there was a peak of 3.4 violent crimes per 1,000 people, which decreased to a low of 1.97 in 2004 then spiked upwards 24.2% to 2.51 in 2006. California's violent crime rate decreased from 9.5 per 1,000 people in 1995 to 5.2 in 2006. Even in peak years, Marin's violent crime rate has remained two to three times lower compared to the State.

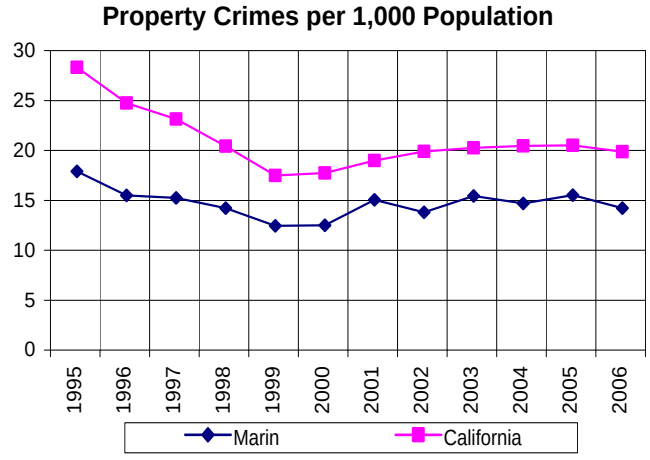
In 2003, the State Dept. of Justice included larceny (theft over $400) in the property crime category to more accurately represent crime in California. The 1995-2002 property crime totals and crime rates were adjusted to reflect this change. With this change in methodology Marin's per 1,000 population property crime rate still experienced a decrease from 16.9 in 1995 to 13.5 in 2006.

Since then, property crimes between 1999 and 2005 have varied reaching 14.5 in 2005 then decreasing to 13.25 in 2006. Marin saw a 22.1% increase in 2001 while the State experienced an 18% increase during the same period. The gap between the property crime rates in Marin and the state has decreased, even with an overall decline from the 1995 peak.

What this means:

Crime rates are indicative of the overall social health of a community and local economy. Areas with lower crime rates tend to be more desirable, especially for parents seeking a safe environment for their children. Safe local streetscapes, parks, and other public spaces attract a diversity of residents rendering the spaces more vibrant. Additionally, business costs can decrease due to lower insurance rates and a lesser need for expensive security services. Conversely, local businesses can enjoy higher revenues by attracting clients concerned about area safety. A safe environment encourages businesses and homes to invest in physical upgrades, which revitalizes the environment both economically and socially.





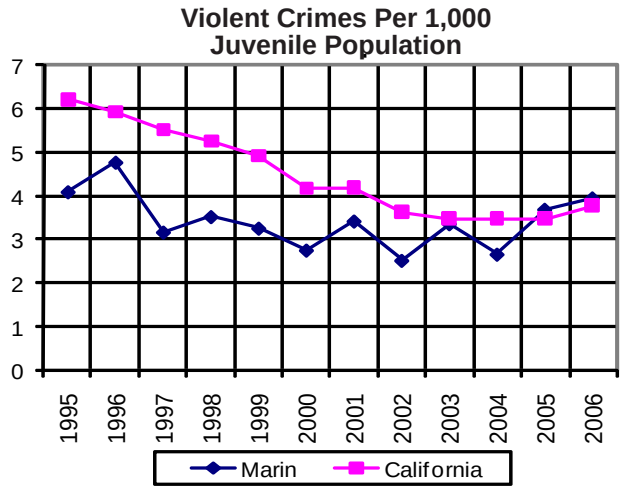
Source: California Department of Justice

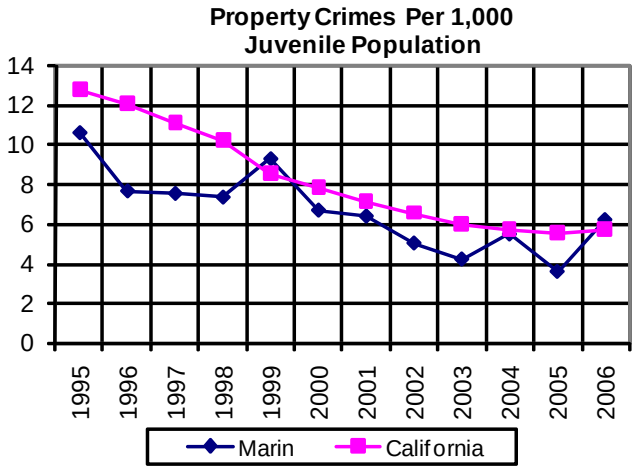
Juvenile Crime Rates Vary, Misdemeanor Rates Higher Than State Average

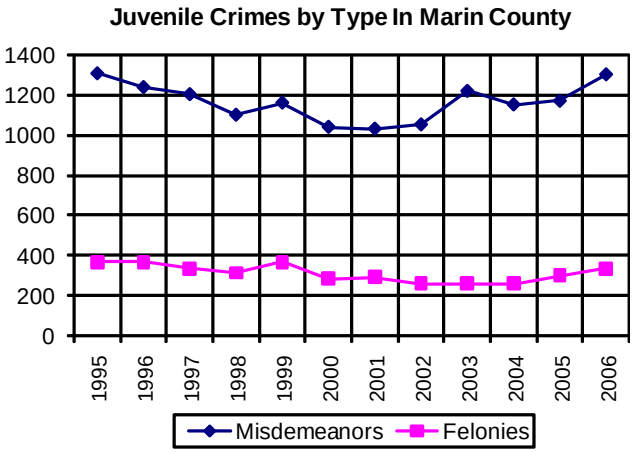
Per capita violent and property crime committed by Marin Juveniles have, with a few exceptions, remained below State juvenile crime rates over time. On the other hand, the rate of juvenile misdemeanors has consistently been nearly double the level compared to the State over the past ten years. Moreover, the gap between the rate of juvenile misdemeanors in Marin and the State increased from 39.1% in 1995 to 52% in 2006. Misdemeanors account for the majority of crimes perpetuated by Marin juveniles. Juveniles committed 1,307 misdemeanors in 1995, which decreased to 1,033 in 2001, then gradually increased to 1,302 in 2004. The number of juvenile felonies, however, decreased overall from a high of 367 felonies in 1995 to 335 in 2006.

Juvenile violent crimes decreased from 4.1 per 1,000 in 1995 to 2.8 in 2000, then increased to 4 per 1,000 in 2006, eclipsing the State rate. Comparatively, the state rate fell from 6.2 per 1,000 in 1995 to 3.79 in 2006. Between 2004 and 2005, Marin experienced a 38.5% increase from 2.66 per 1,000 to 3.69 per 1,000, the highest rate since 1996 when 4.76 per 1,000 violent crimes were reported.

In 2003, the State Department of Justice included larceny--theft over $400--in the property crime category to give a more representative depiction of crime in California. The 1994-2002 property crime totals and crime rates were adjusted to reflect this change. Property crime rates by juveniles have varied for Marin over time, ranging from a high of 10.6 per 1,000 people in 1995 to a low of 3.56 in 2005. However, in 2006 property crimes spiked 73.6% to 6.2 per 1,000 juveniles, eclipsing the State rate of 5.7 per 1,000 juveniles.







Source: California Department of Justice

What this means:

Juvenile crime rates tend to be less related to the overall health of the economy compared to adult crime rates. Most juvenile crimes occur during after school hours, which is indicative of a lack of supervision and/or alternative activities. Juveniles who are incarcerated are more likely to return to prison as adults and can be an ongoing burden and cost to society at large. Diversion programs for nonviolent offenders have been shown to discourage similar behavior in the future.

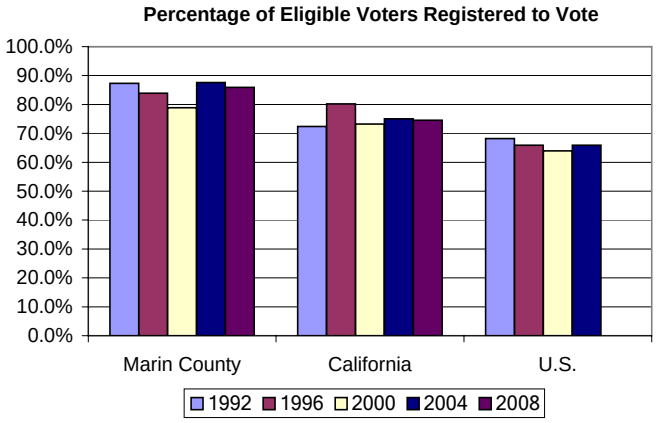
Marin Residents Politically Active

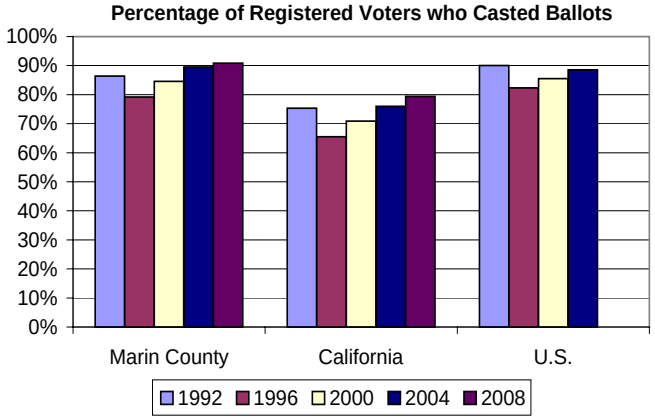
Marin's voter participation rate among registered voters over the last five presidential elections has been considerably higher than the State but comparable to the national rate. While California's participation rate has fluctuated between 65.5% and 79.4%, the national rate has ranged from 82.3% to 90% since the 1992 election. Marin's participation rate grew from a low of 79.2% in 1996 to 89.5% in the 2004 election. In the recent 2008 election, the voter participation rate edged up to a high of 90.8%. (National and State general election information is not available to date.)

When looking at those who voted as a share of the overall population eligible to vote (people of voting age who may or may not be registered to vote), Marin's participation rate is much higher than both the State and the nation. While California's rate ranged from 72.4% to 80.2%, the national rate has fluctuated between 63.9% and 68.2%. Marin's rate steadily fell from 87.3% in 1992 to a low of 78.9% in 2000. After rebounding to a high of 87.6% in the 2004 election, Marin's participation rate slightly fell to 85.9% in the 2008 election.

What this means:

Voter turnout rates are indicative of a high level of civic involvement in Marin. General disillusionment by the public with politics reflects in lower voting rates. High participation rates in past elections, especially the historic 2008 presidential election, confirm that the residents of Marin believe in the democratic process and take advantage of opportunities to influence political and social decisions.

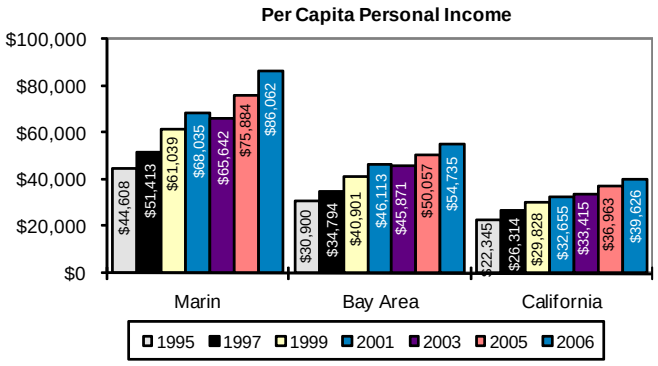




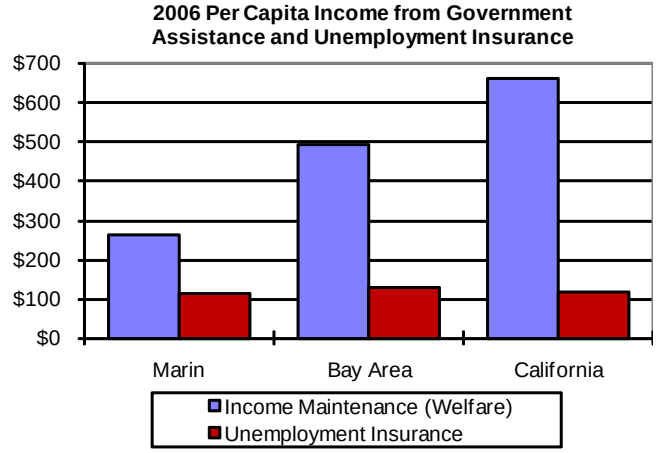
Sources: U.S. Census Bureau, California Secretary of State, and Marin County Registrar of Voters

Marin Per Capita Income Highest in Bay Area and California

The per capita income of Marin residents was $65,642 in 2003, compared with $45,871 for the Bay Area and $33,415 for California. These are increases from 2001 incomes of $46,113 and $32,655 in the Bay Area and the State, respectively. However, Marin's per capita income saw a slight decrease of $2,393 from 2001 to 2003, likely due to declines in some investment portfolio performance, most notably stocks. In 2005, per capita income in Marin increased to $75,884, compared with $50,057 in the Bay Area, and $36,963 in California. As of 2006, per capita income grew to $86,062 in Marin compared with $54,735 in the Bay Area and $39,626 in California.

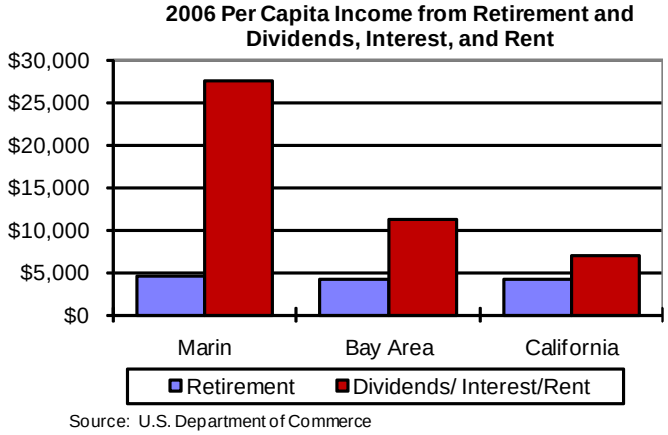


Net Earnings (wages) for Marin and the Bay Area has experienced a minimal decrease since 2001, with California increasing minutely. Per capita dividends, interest, and rent income earned was significantly above Bay Area and California averages at $27,567 compared with $11,263 and $6,957 in 2006, respectively. Retirement compensation was $4,663 for Marin, $4,305 for the Bay Area, and California's at $4,323. Government assistance such as Welfare (Income Maintenance) was only $264 per capita in Marin compared with $492 for the Bay Area and $663 for California. Unemployment Insurance payments were $116 per capita for Marin, $131 for the Bay Area, and $120 for California.



What this means:

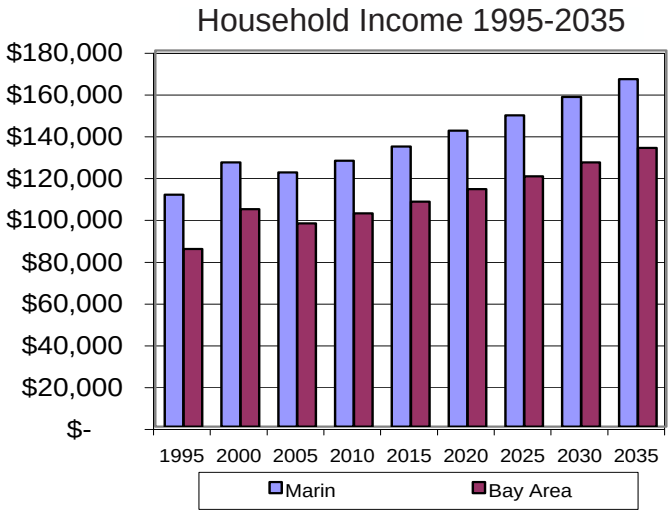
Per capita income is an indicator of relative affluence. High earnings are indicative of well-compensated workers who live in Marin. The high percentage of dividend, interest, and rent income shows that a significant portion of Marin residents' incomes come from sources other than wages while the low figure for government assistance is indicative of a lesser number of persons receiving assistance compared with other areas.



Source: U.S. Department of Commerce

Household Income in Marin Increasing at a Faster Rate than the Bay Area

Household income in Marin County (in constant dollars) increased from $111,050 in 1995 to $121,600 in 2005 and is projected to reach $127,200 in 2010, $157,700 by 2030, and $166,300 by 2035, as projected by the Association of Bay Area Governments. Compared with the Bay Area, Marin's household income is approximately 20% higher than that for the Bay Area during the entire study period. Between 1995 and 2005 the income difference between Marin and the Bay Area region shrank from $26,050 to $24,300, but is projected to increase to $25,200 in 2010, $31,300 by 2030, and finally to $32,900 by 2035.



Figures are in constant 2000 dollars

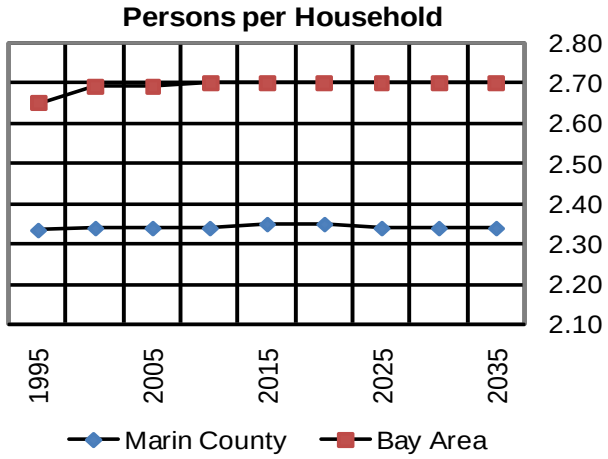
Source: Association of Bay Area Governments

What this means:

Household income is another indicator of overall wealth. Unlike per capita income, the number of workers in a household affects household income. With the higher costs of living in Marin, it is necessary to have a greater household income, which can be achieved by having a wage earner with a higher pay rate or an increased number of persons in the household who are employed. While many Marin households fall into the former situation, there are many neighborhoods where the latter is true and is evidenced by overcrowding of housing units. The greater increases in household income over time are due not only to increasing overall wealth, but also the trend of fewer single-earner households as time goes on.

Household Occupancy Expected to Remain Relatively Constant Over Time

Household occupancy, measured in persons per household, in Marin and the Bay Area has remained relatively stable; however it is projected to decrease in the coming years. In Marin County between 1995 and 2005, household occupancy was 2.34 persons per household. A slight increase to 2.35 persons per household is projected by 2020, although it is expected to decrease back down again to 2.34 by 2035. Throughout this period, Compared with the Bay Area, Marin's household occupancy is significantly lower during the same time and, with the exception of San Francisco, has one of the lowest occupancy rates in the Bay Area. Compared to the Bay Area, Marin had 0.32 fewer persons per household in 1995 and 0.35 fewer persons in 2005. By 2035, this disparity is expected to grow to 0.36.



Source: Association of Bay Area Governments

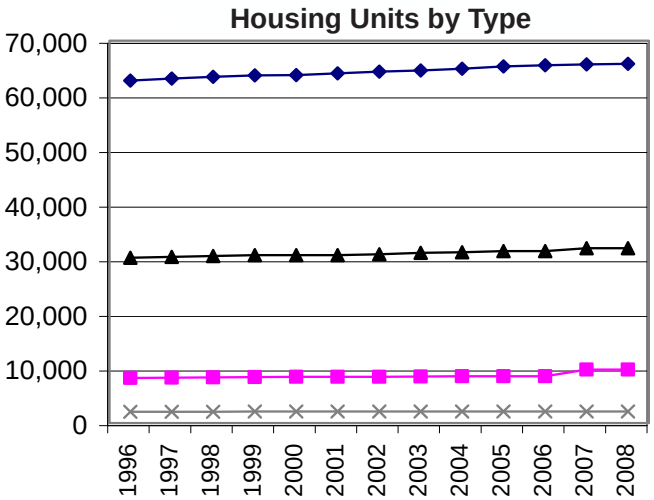
What this means:

Housing occupancy is indicative of social trends and family size; it can also reflect the general health of the economy. With high housing costs, people are forced into sharing living accommodations that they would not readily accept under more favorable circumstances. On the other hand, Marin's aging population is reducing the occupancy rate as children move out and mortality increases, although turnover of larger units to some degree mitigates this. With a lower average rate of occupancy, more residential units will be required to accommodate any given increases in population.

New Housing Units Added Slowly

New housing units have been added at a slower pace compared to other areas of California. From 1996 to 2008, 6,432 housing units were constructed. Of these, 3,107 were single family detached homes, 1,732 were apartments, and 1,529 were condominiums. Fewer than 100 mobile homes were added to the county's housing stock since 1996.

Detached single-family homes represent the majority of the county's total housing stock at 60%. Apartments are the next most common housing type at 29.2% followed by condominiums and townhouses at 9%, and mobile homes make at only 2%. Over time, the share of detached single family homes, as a percentage of the total housing stock, has remained relatively constant while the percentage of condominiums and townhouses has improved by 1%, and the share of apartments and mobile homes have remained unchanged.

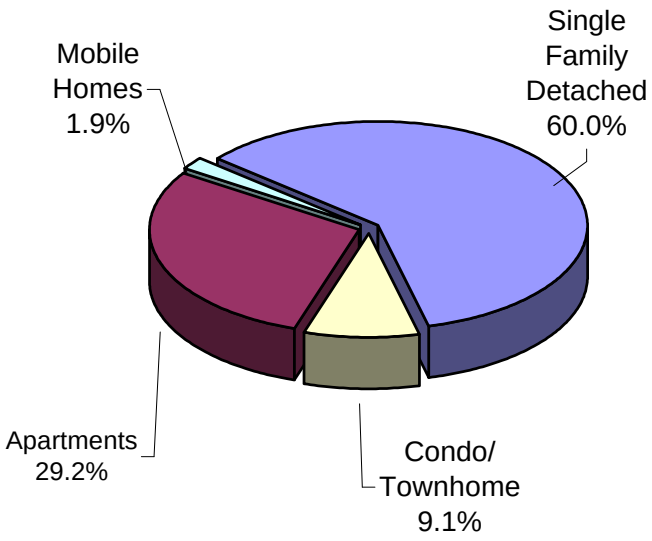


Source: Department of Finance

What this means:

A variety of housing types are needed to provide shelter for local residents and employees. A housing mix and supply that does not meet the needs of residents can have significant impacts on the cost of housing, whether owner- or renter-occupied. When housing is not added to keep pace with job growth, housing costs can increase dramatically over what would occur with normal inflationary increases in value. Marin has experienced this firsthand, especially related to single-detached-family dwellings and rental units. If greater multifamily unit construction composes a greater share of the housing stock in the future, more affordable units can be created than if new construction is predominantly detached single-family units.

Distribution of Housing Unit Types 2008



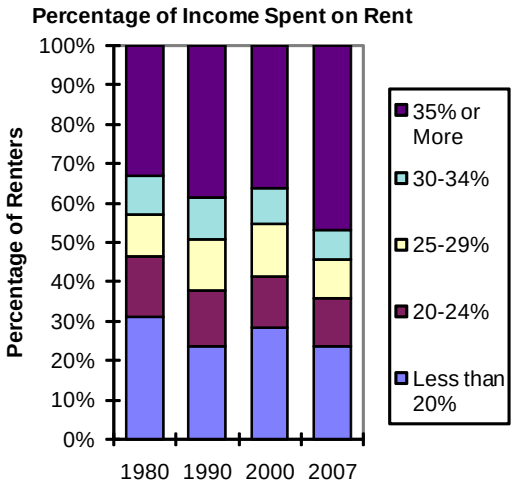
High Percentage of Income Spent on Rent

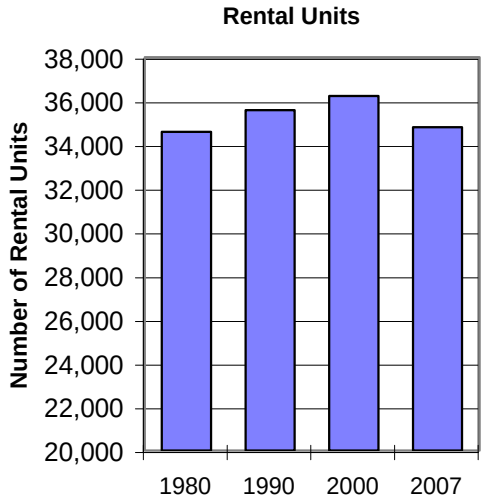
In 1980, over 31% of renters spent at least 35% of their household income on rent. By 1990, persons spending at least 35% of household income on rent increased to 37% but slightly dropped to 35% in 2000. In the past Marin has been an area of large residential development; during the 1980's however, only 1,000 new units were constructed and between 1990 and 2000 the amount continued to drop and only 650 new units were constructed.

The number of persons spending less than 20% of household income on rent was 20% in 1980, rising to 22% in 1990 and 27% in 2000. By 2007, the number dropped back to 1990 rates at 22%. While the number of persons paying 20-34% of household income on rent has remained between 33.6% and 35.6% from 1980 to 2000, in 2007 the percentage dropped to 27.9%, reflecting the increase in mean rent. The mean rent was $391 in 1980, increasing to $863 in 1990 and $1,162 in 2000. By 2007, the mean rent had increased to $1,482.

What this means:

Rental costs are a factor of supply and demand. The amount of household income spent on rent can be directly correlated to the number of rental units. Households at the lower end of the economic scale tend to pay a larger portion of their incomes on housing. Without the addition of more rental units, as well as preservation of existing deed-restricted affordable units, rents will continue to increase faster than inflation and consume more of renters' income. Persons with low incomes either need to find subsidized housing, crowd into a unit with other wage earners, or locate outside the county. The significant numbers of workers in the county who are in lower-paying jobs require low cost housing; without it, they must find housing and/or employment outside the county.





Source: U.S. Census Bureau

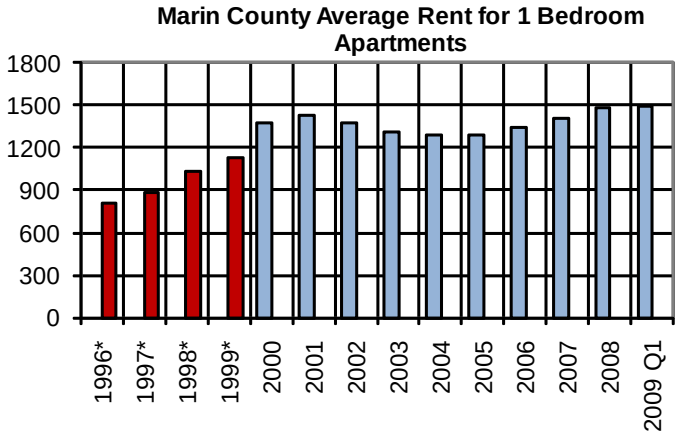
Rental Rates Rebound and Many Still Priced Out of the Market

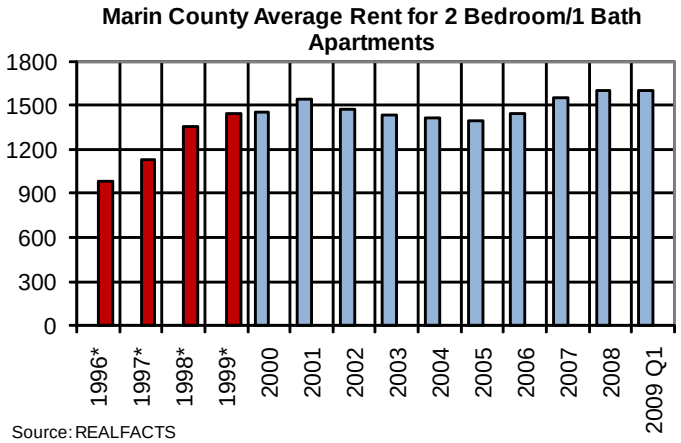
The average rent of a one-bedroom rental in Marin rose from $807 in 1996 to a peak of $1,431 in 2001. Following the dot com bust, average rent then fell 11.4% to $1,284 by 2005. However, by the first quarter of 2009, average rent rebounded 13.8% to a new high of $1,489.

The cost of a two-bedroom rental increased from $988 in 1996 to $1,445 in 1991, a 46% increase. Similar to one-bedroom apartments, average rent peaked in 2001 at $1,540 per month but slumped 10% to $1,400 by 2005. However, by the first quarter of 2009, average rent for a two-bedroom rental rebounded to a new peak of $1,604, a 12.7% increase.

The decrease in rental rates following the burst of the dot com bubble in 2001 can be attributed to an increase in vacancy rates in tandem with the record-low mortgage interest rates, which encouraged many renters to enter the housing market.

Note: Two sources of data are used: 1996-99 data was obtained from the Sonoma-Marin Market Update while 2000-09 data was obtained from REALFACTS. As a result, these time periods may not correlate to each other.





Source: REALFACTS

*Source: Marin-Sonoma Market Update

What this means:

The significant increase in rental rates through the 1990's continues to affect the ability of Marin workers and residents to pay for housing within the county. Even with the decreases seen in the last few years, rents are still high enough that many lower-wage workers cannot afford the mean rent. Disproportionately high rents affect commute patterns, especially for families earning less than the median income in Marin. Increased commuting also adds to congestion and fuel emissions.

In addition, increased rental rates affect the ability of some employers to retain a stable workforce. Although there has been an increase in rental vacancies and a commensurate reduction in rents, as the economy rebounds, it is expected that rents will again climb because of relatively few new rental units being added to the county's housing stock.

Need for Housing Assistance Continues, Affordable Housing in High Demand

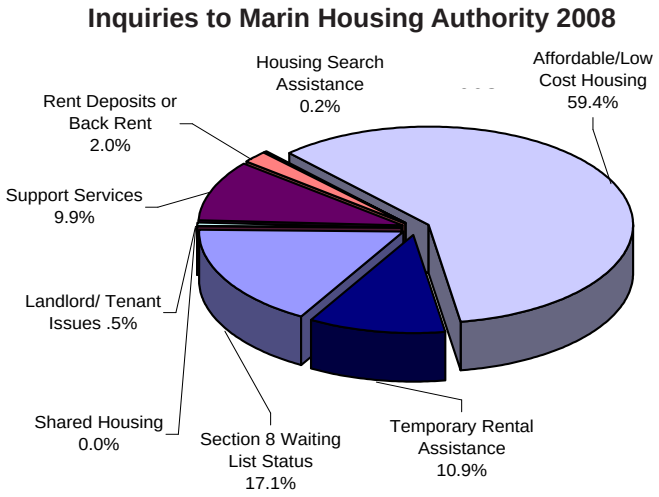
The Marin Housing Authority (MHA) provides housing assistance for low and moderate income people. In 1999, the MHA received 7,581 calls for assistance, which dropped to 3,214 in 2001. However, calls dramatically increased by 134% to 7,548 in 2004. By 2006 the number of calls dropped to an average of 4,100, and then sharply rebounded to 7,499 in 2007 before falling to 5,843 in 2008.

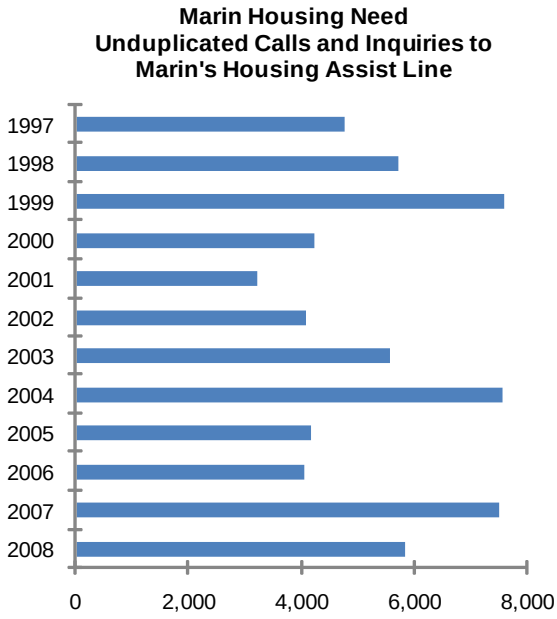
In 2003, the majority of calls were for housing search assistance. In 2004, the percentages of calls were roughly split between questions about Section 8 Waiting List Status, Support Services, and Housing Search Assistance. In 2005 and 2006, a majority of calls regarded support services followed equally by housing search assistance and affordable or low cost housing. In 2007 and 2008, a majority of calls were for affordable or low cost housing.

The Housing Authority added Temporary Rental Assistance as an inquiry category in 2003. The Section 8 program, which provides federal matching dollars to individuals paying a percentage of their rent, has had a closed waiting list since 2002 because of the large number of families needing this assistance. There is an increase in the number of landlords that are accepting Section 8 subsidized rental applicants as tenants increased from 2003 to 2005. Calls made in regard to the Section 8 program are mostly from families checking the status of the waiting list, which can be at least five years long. Other calls are made for assistance with rental deposits or back rent, shared housing, emergency shelter or transitional housing, landlord-tenant issues, and temporary rental assistance.

What this means:

The need for housing assistance continues, given the significant rise in home costs for both rental and ownership. As housing costs rise, families are spending a larger percentage of their monthly income on rent or mortgage payments. While HUD calculates appropriate affordability levels based one-third of a family's income, some Marin families are spending one-half or even more than one-half of their monthly income on housing. This makes them much more vulnerable to rent increases or other factors that could cause them to lose their housing. Although the number of calls to the Housing Authority has increased, it does not necessarily mean more families are receiving assistance, but it does suggest that the number of families in need of assistance is increasing. While rental rates have decreased considerably in the last few years, the average rent is still at a level where lower income households still require supplemental assistance to afford the rent.





Source: Marin Housing Authority

Home Sales Prices Drop While Overall Sales Decline

The median price of a home in Marin rose 149% from $352,500 in 1997 to a high of $879,450 in 2007. However, home prices have since dropped 13% to $767,000 in 2008 as the mortgage and financial crises began to take hold. Median single-family home prices increased 163% from $400,000 in 1997 to a peak of $1 million in 2007, but later declined 6% to $914,000 in 2008. The median price of condos and townhomes followed a similar pattern, rising 157% from $224,000 in 1997 to a high of $570,000 in 2007, but then fell 154% to $415,000 in 2008.

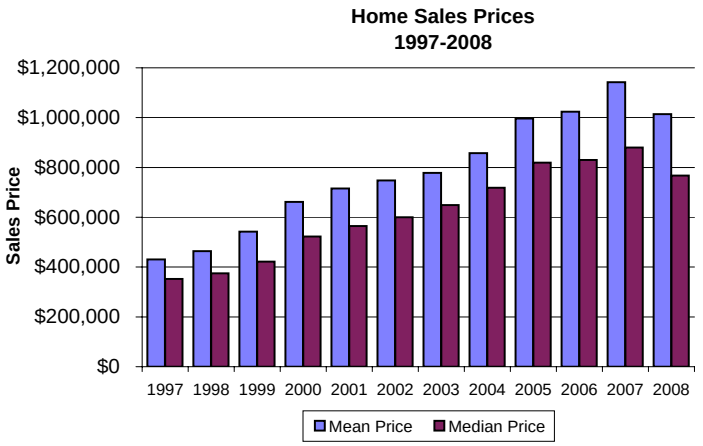
Although the mean living area of homes sold from between 1997 and 2002 decreased from 1,820 square feet to a low 1,763 square feet, respectively, home sizes grew to a high of 1,932 square feet in 2007 before slightly falling to 1,894 square feet in 2008.

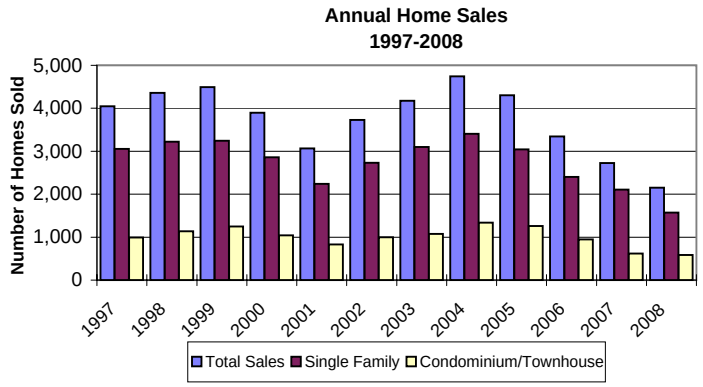
The total number of home sales has fluctuated since 1997, when 4,046 homes were sold. This increased to 4,495 by 1999, and then decreased to 3,068 in 2001. By 2004 the number of sales reached a peak of 4,743, corresponding to a similar peak in housing prices, but then dramatically decreased 55% to a low of 2,153 sales in 2008 as a result of the collapse of the housing bubble. Sales of single-family homes have varied from a high of 3,246 units in 1999 to a low of 1,570 in 2008. In 1997, 990 condominium and townhouse exchanged hands, which peaked in 2005 with 1,338 sales, then dropped dramatically to 583 sales in 2008.

What this means:

Real estate sales are indicative of the overall health of the economy and the number of available units. Because Marin does not add a significant number of housing units each year, housing prices remain high and exclude many from home ownership. Periods of economic downturn usually affect lower-end sales more than high-end sales because wealthier home buyers tend to be less affected by economic downturns. Over the past several years, the housing market has experienced reduce demand possibly due to a smaller pool of buyers able to qualify for jumbo loans which require tighter mortgage lending requirements. Record low interest rates, lax lending standards, and a speculative fever provided the opportunity for many first-time buyers to enter the market and enabled others to move up into larger housing units. Homeowners were unable to pay their mortgages as these sub-prime mortgages began to revert to regular interest rates, resulting in an increase number of mortgage defaults and home foreclosures, which lowered home prices and reduced home equity.

Significant differences between the mean and median price are caused by an uneven distribution of units sold in relation to the average sales price. For example, a small number of ultra-expensive homes being sold inflates the mean sales price but has less effect on the median price.

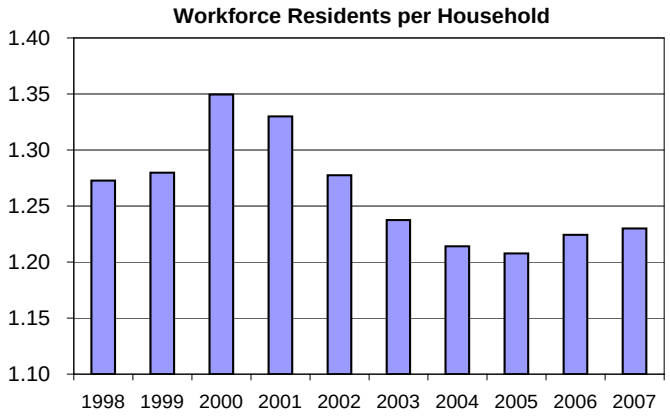




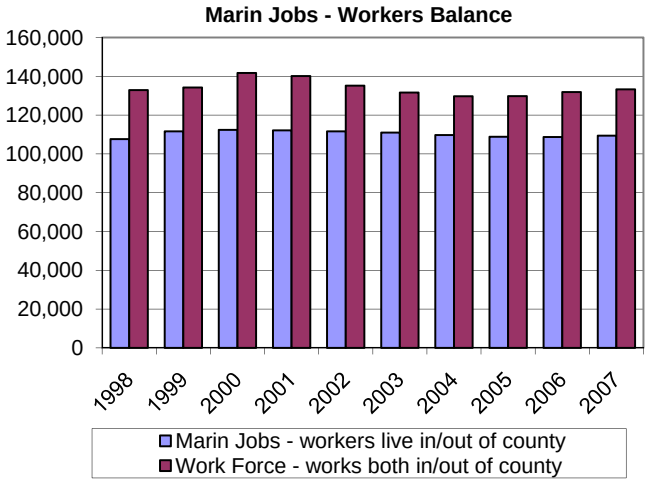
Source: Marin County Assessor

Housing Construction Lags Job Creation

The number of employed residents increased from 129,700 in 1998 to a high of 141,700 in 2000, the peak of the economic boom. By 2004 the labor force fell 8.5% to a low of 129,700 employed residents. As of 2007, the workforce rebounded 2.7% to 133,300. The number of jobs mirrored this trend, which increased from 107,600 jobs in 1998 to a high of 112,400 in 2000, but later fell 3.3% to a low of 108,700 jobs in 2006. Jobs slightly rebounded to 109,400 in 2007 and overall grew by 1.7%. By contrast, the number of housing units increased from 104,420 in 1998 to 108,380 in 2007. This was an increase of 3,960 units or 3.8%.



There was an estimated 1.27 employed residents per housing unit in Marin in 1998, increasing to a peak of 1.35 in 2000, and then dropped to 1.23 in 2007. Even assuming the 2000 peak level of 1.35 employed residents per household, an additional 7,406 housing units should have been constructed during this period to keep pace with the job growth. At the lower end of 1.21 employed residents per household, the deficit decreased to 2,869 units. As of 2007, this ratio grew to 1.23 though the housing deficit fell to 1,020 units.



Sources: Employment Development Department, Labor Market Information Division

While the creation of new jobs has historically outpaced the creation of new housing units, the number of workforce residents per household indicates that Marin at times needs to add more jobs to maintain a balance. However, Marin provides housing for San Francisco, which is a city with more jobs than housing. So while a jobs-housing balance is internally satisfied in Marin, San Francisco's unbalanced jobs to housing ratio (more jobs than housing exists) has pushed San Francisco workers to live in Marin thereby causing an imbalanced ratio in the county.

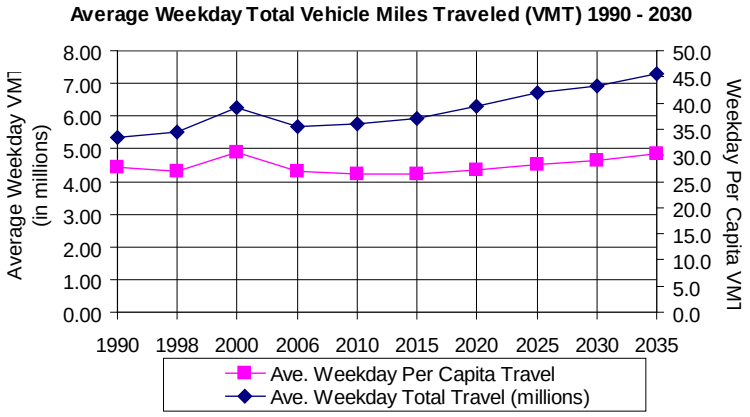
What this means:

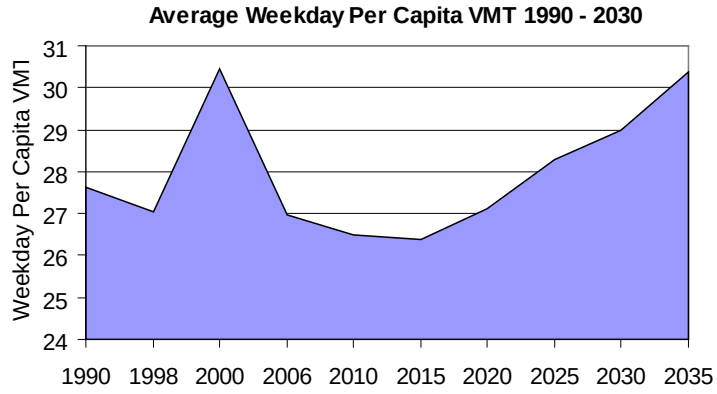
The jobs-housing ratio is an important indication of community function on many levels. A community with significant imbalance, one way or the other, can suffer several negative consequences. An imbalance will increase commute distances and often add to congestion. This, in turn, results in an increase in fuel consumption and emissions while reducing air quality. Additionally, when there are insufficient housing units for local employment, housing costs escalate due to high demand and employers can have difficulty attracting and retaining employees. As long as Marin continues to provide housing for other employment centers, housing units will need to be added at a greater rate than necessary due to employment growth within the county.

Total Vehicle Miles Traveled on the Rise

Average weekday total vehicle miles traveled (VMT) increased 6.2% from 5.33 in 1990 to a high of high of 6.25 in 2000. While VMT dipped 9.3% to 5.67 million miles in 2006, it is projected to increase 29% to 7.3 million miles by 2035. Additionally, the driving age population (persons 15 years and older) was 190,611 in 1990 and 210,100 in 2006, and is projected to increase 14.4% to 240,000 in 2035.

Per capita VMT was 27.6 miles traveled in 1990, which grew to 30.4 in 2000, then decreased to 27 miles traveled by 2006. Although per capita VMT is projected to fall 2% to a new low of 26.4 by 2015, models indicate this number will increase 15% to a high of 30.4 miles by 2035, mainly due to the fact that the growth of the driving age population will slow down while average weekday VMT will grow at a consistently elevated pace.





Source: Metropolitan Transportation Commission

What this means:

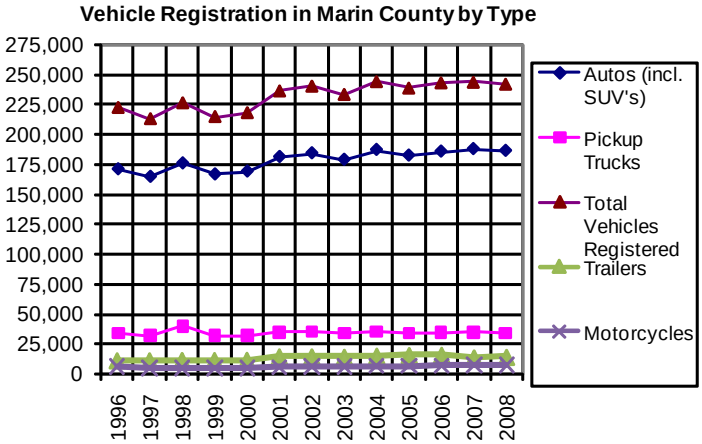
Vehicle miles traveled (VMT) indicates the efficiency of traffic circulation and travel trends. While VMT is expected to increase as the driving age population increases, the increase in per capita VMT indicates that people are driving more. Longer commutes, more solo drivers, increased errand related trips, and more commercial traffic can all explain a higher per capita VMT trend.

The substantial increase in VMT in Marin forecasts worsening traffic on county roadways. Limited opportunities for improving circulation without expanding existing right-of-ways and increasingly intense competition for outside transportation funds mean that Marin's road network will not see significant increases in road capacity in the near future. With the completion of high occupancy vehicle (HOV) lanes on Highway 101 in San Rafael and north of Novato, lane capacity is improving, but many of Marin's traffic problems are on surface streets.

With the prospect of more people driving longer distances, increased carbon emissions might partially cancel out any regional efforts aimed at reducing emissions. However, the recently passed transportation sales tax measure will raise revenue for many projects, including local transit enhancements, but will still fall short of funding all needs.

Vehicles Registered in Marin Increasing and Outnumber Driving Age Population

The total number of registered vehicles in Marin fluctuated from a low of 212,258 vehicles in 1997 to a peak of 243,499 in 2004, a 14.7% difference. Between 2005 and 2007, there was an average of 241,000 vehicles, although in 2008 the number of vehicles increased back up to 241,308. Auto registrations, which include SUV's, dipped to from a low of 164,476 in 1997 to a high of 187,531 in 2007. In 2008, auto registrations slightly fell to settle at 186,047. Meanwhile, the number of registered trucks, which in Marin are almost all pickup trucks, fell 20.5% from a high of 38,869 in 1998 to a low of 31,693 in 1999. Truck registrations remained flat between 2000 and 2007, averaging 34,200. By 2008, registered trucks declined to 33,692. The number of motorcycles steadily rose 31.4% from a low of 4,580 in 1997 to a high of 7,550 in 2008. Meanwhile, the number of trailers increased 40.6% from a low of 11,170 in 1997 to a high of 15,706 in 2006. Most of the gain in the period occurred in 2002 when trailer registration spiked 25%. By 2008, registered trailers declined to 14,019.



Source: California Department of Motor Vehicles

What this means:

Increased vehicle registrations mean potential for more vehicles on the road and, by extension, increased congestion. With just over 200,000 driving age persons and over 241,000 registered motorized vehicles, there are far more vehicles than drivers. Since additional vehicles must be stored somewhere, the increase in vehicles has resulted in many parking conflicts, especially in older denser neighborhoods that were not designed with cars in mind or were designed for one vehicle per household.

In and Out of County Commuting Continues to Increase

Terms Used:

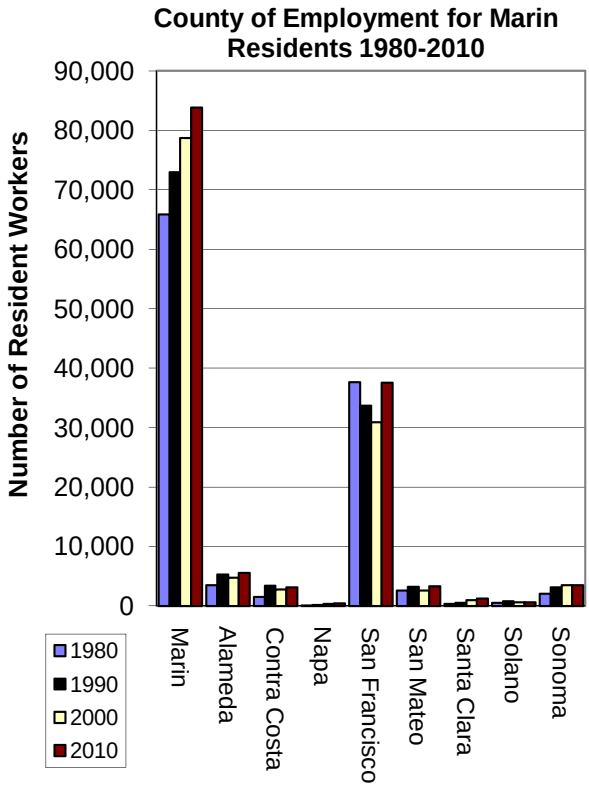
Marin Resident Worker: A person who lives in Marin County and is employed either in or outside of the county.

Marin Employee: A person whose place of employment is in Marin County, but does not necessarily live in the county.

Historical data is derived from 1980, 1990, and 2000 US Census Bureau journey-to-work datasets. Projections for 2010 are derived from Metropolitan Transportation Commission (MTC) commuter forecasts, which are modeled on the Association of Bay Area Government's (ABAG) Projections 2003 Data and Census 2000 journey-to-work data.

The number of jobs in Marin increased by 20,585 between 1980 and 1990 and increased another 17,697 by 2000. By 2010, an additional 10,571 jobs are projected. The ratio of Marin resident workers to the number of jobs in Marin County dropped from 1.37 in 1980 to 1.19 in 1990 and later to 1.03 in 2000. This is reflected in a 9.2% increase in the number of Marin resident workers, while the number of jobs in Marin increased 45.8% during the same period. By 2010, this ratio is expected to slightly rebound to 1.06. Although the long-term trend has helped towards achieving a worker-to-jobs balance within the county, the relationship of where workers live versus where they work indicates that a significant number of Marin residents work outside the county while many Marin employees live in other counties.

The number of Marin residents working in Marin as a percentage of the county's total workforce increased from 57.5% in 1980 to 62.7% in 2000, but is expected to decrease to 60% by 2010. San Francisco remains the largest out-commute destination for Marin resident workers. The proportion of commuters traveling to San Francisco decreased from 33% in 1980 to 24.6% in 2000. By 2010, the proportion is expected to increase to 27%. Commuting to Alameda, Contra Costa, Sonoma, and San Mateo Counties increased considerably from



8.5% of all Marin out-commuters in 1980 to 10.8% in 2000 and an expected to rise to 11.2% by 2010.

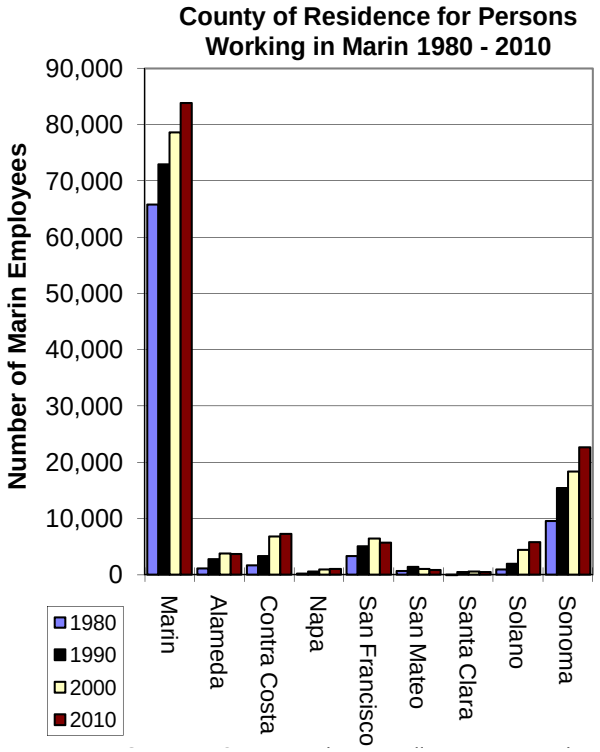
The number of Marin residents working in Marin as a percentage of all persons working in Marin has actually decreased. Significant increases in non-resident workers have occurred as Sonoma County residents made up 15% of Marin workers in 2000, up from 12% in 1980. It has also shown the highest absolute increase of 8,742 workers during this period.

Workers commuting from San Francisco have nearly doubled from 3,332 (4%) in 1980 to 6,450 (5.3%) in 2000. Commuters from Alameda, Contra Costa, and Solano County residents also increased from 4.5% to 12.3% of Marin employees during the same period. By 2010, Sonoma residents will comprise 17.1% of Marin workers while San Francisco residents will be only 4.3% of Marin workers.

Since Marin's housing costs are very high, persons living in Marin need higher incomes to afford to live here, even if it means commuting elsewhere. At the same time, many persons working here, especially in retail and service jobs, do not earn enough to afford housing near to where they work and therefore live where the cost of housing is less. Due to inflated housing costs in San Francisco, Marin is impacted by Sonoma County commuters travelling to jobs in San Francisco. These "through-commuters" consisted of 6.3% off all commuters travelling into the county in 2000 and is expected to grow to 8.1% by 2010.

What this means:

Commuting patterns can be indicative of the adequacy of local employment and compensation in relation to the cost of living. Increased commuting results in greater vehicle traffic and higher demands on transportation networks. Without expanding transportation systems, road congestion worsens, commute times increase, and air quality deteriorates. The amount of traffic on Highway 101, Marin's main artery, has continued to increase while improvements to the highway and public transit have not kept pace. However, the recently passed transportation sales tax measure will provide funds for additional transportation improvements, although it will fall far short of actual needs. Meanwhile, local citizens continue to resist the development of additional workforce housing, which would provide additional options for current Marin employees who commute from other counties.



Sources: U.S. Census Bureau and the Metropolitan Transportation Commission

Congestion Costs Vary with Economic Health but Higher Over the Long Term

The hours of delay due to congestion have experienced three major dips since the inception of this study: 1995, 2001, and 2003. The overall incline from 1995 to 2000 can be attributed to the economic expansion of the 1990's. The overall decrease between 2000 and 2003 coincides with the subsequent downturn in the economy, which indicates fewer vehicles on the road during peak commute periods. However, by 2008, road congestion climbed 85.5% to a period high as a result of the recovering economy. According to the MTC/ Caltrans report "Bay Area Transportation: State of the System 2008", the morning commute on Southbound U.S. 101 from north of Route 37 to south of Lincoln Avenue was ranked second among all congested Bay Area highways.

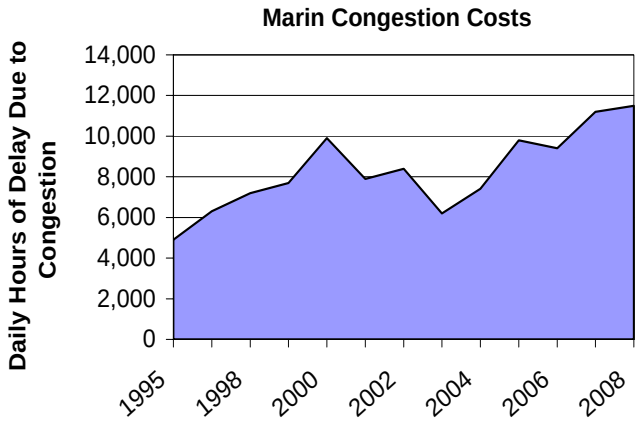
Greater levels of vehicle delay reflect increased commute distances resulting from insufficient affordable housing in the County, especially for lower income workers. Additionally, normal rush hour residual congestion and workers altering their work schedules to avoid the traditional "rush hour" have resulted in extended commute periods and increased hours of delay. Additional commute volumes result from "through commuters" travelling from Sonoma to San Francisco and other East Bay communities and students shuttled to school in private vehicles.

What this means:

Congestion costs impact the economy through loss of daily productive hours. The impact is most significant for businesses that rely on transportation of goods and services during the business day. In addition, increased hours spent on the road commuting to and from work can result in lowered on the job productivity by workers, and an increased job turnover rate. Increased congestion results in lowered quality of life, and leaves the population with less time to spend with families and in their communities. Also, increased congestion results in higher fuel consumption rates, and higher vehicle emissions, which places a burden on the environment.

Note on Methodology:

Caltrans measures congestion as a condition where the average highway speed drops below 35 mph for 15 minutes or more on a typical weekday. The length of directional miles of congestion is calculated as the segment of freeway experiencing speeds below 35 mph for 15 minutes or more. The congestion data is recurrent (everyday rush-hour stop & go conditions due to demand exceeding capacity) and does not include non-recurrent congestion (caused by holidays, special events, incidents, maintenance work or construction activities where



No data available for 1997, averaged for 1996 and 1998

Source: MTC, Caltrans District 4, Office of Highway Operations

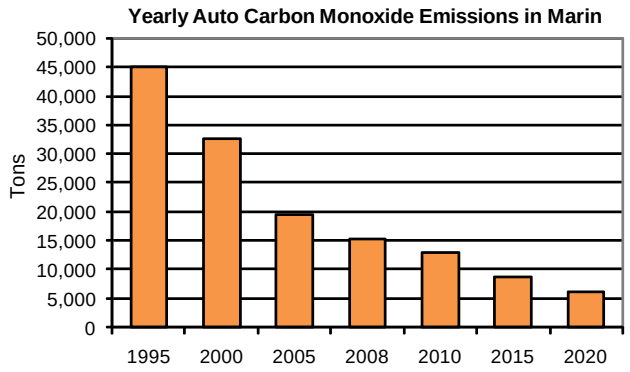
Vehicle Emissions Levels Show Improvement, Carbon Dioxide Largest Emission

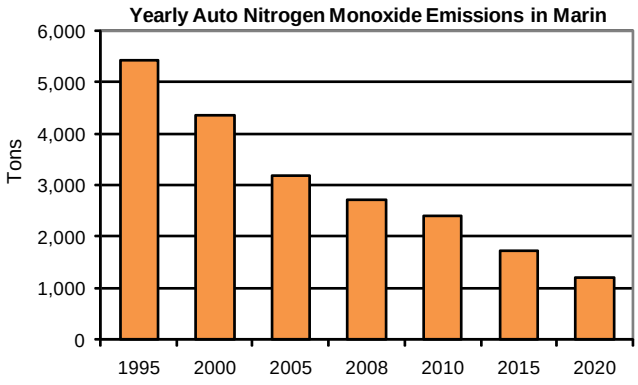
Between 1995 and 2008 vehicle emissions for three of the four key air pollutants – carbon monoxide, hydrocarbons, and nitrogen oxides, all showed substantial net decreases. Carbon Monoxide (CO) emissions decreased a net 66.2%, from 45,147 tons per year in 1995 to 15,279 tons in 2008. Nitrogen Oxide (NOx) emissions also decreased during the same period by 65%, from 5,429 tons to 2,731 tons while hydrocarbon emissions decreased 50%, from 4,767 tons to 1,665 tons. However, vehicle carbon dioxide emissions rose from 2.3 million tons per year in 1995 to the 2002 high of 2.52 million tons. Carbon dioxide emissions then decreased in 2006 to 2.46 million tons.

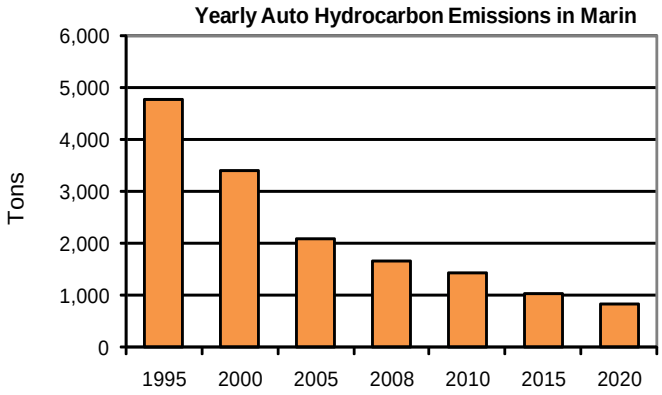
The U.S. Environmental Protection Agency calculates air emissions based on the number of vehicles registered in a region, not based on vehicle miles traveled. For this reason, some data irregularities may exist. The fuel consumption chart demonstrates that even when the number of vehicles registered went down, the amount of fuel consumed went up. This means that the actual emissions may be higher than the charts indicate.

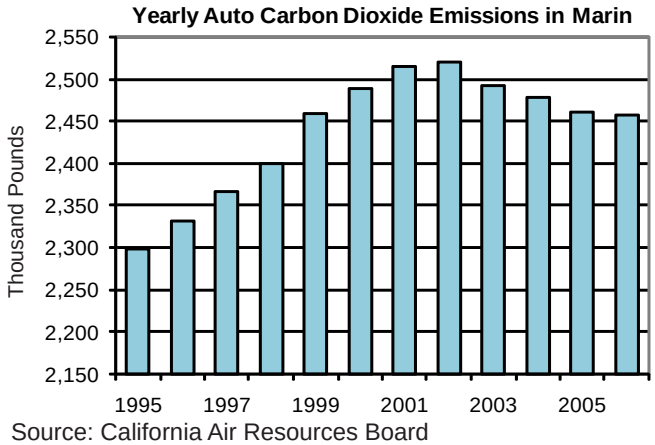
What this means:

There is very little point source air pollution in Marin County from factories or other industries because there is very little heavy industry in the region. As a result, the primary source of air pollutants comes from mobile sources, such as motor vehicles. Air pollutants may contribute to health problems for people on a local level. On a global level, these and other air pollutants may contribute to global warming, which could ultimately impact our local environment and economy. Also, an increased reliance on fossil fuels signals a lack of long-term stability for the economic and social system because they are a finite resource. The decrease in health-related pollutants is likely attributed to improved emission systems on vehicles since vehicle miles traveled have increased. Lastly, carbon dioxide emissions are not affected by emission control systems and are therefore more reflective of driving habits and vehicle choices.





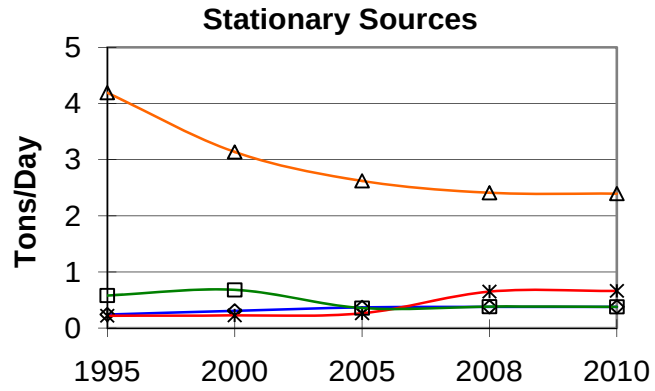


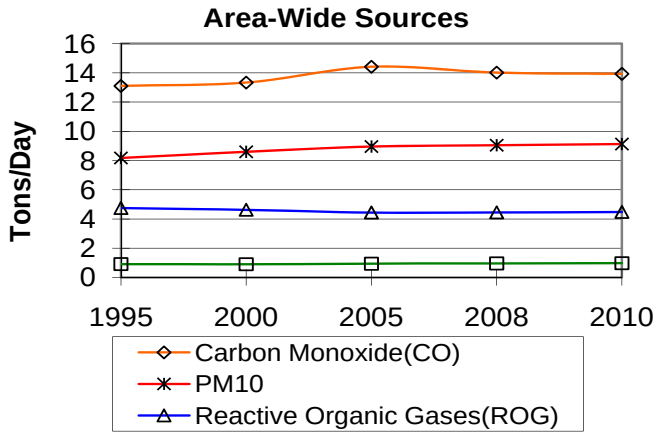


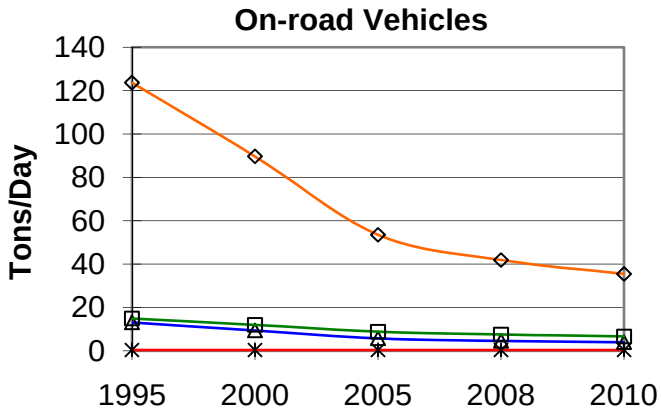
Source: California Air Resources Board

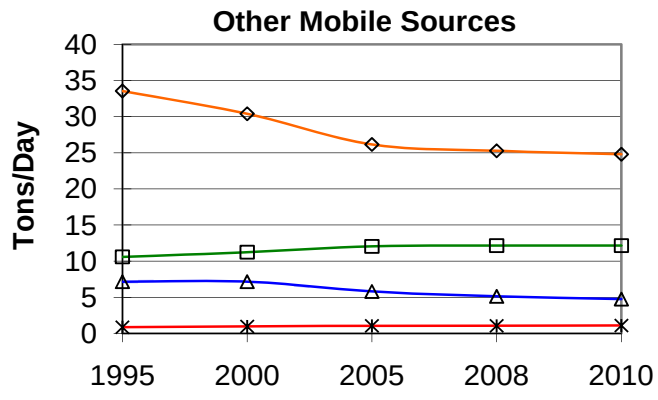
Mobile Sources Account for Vast Majority of Airborne Pollutant Sources

Air Quality data provides a profile of emission sources over time in Marin County. Monitored emissions include Carbon Monoxide (CO), Particulate Matter 10 (PM10), Reactive Organic Gases (ROG), and Nitrogen Oxide (NOx). The most important aspect of this indicator to note is which emission is prominent in each of the four source categories. For Stationary Sources (i.e., industrial facilities), the highest emission is ROG, which is currently at a declining stage. Area Wide Sources (i.e., water heaters, gas furnaces, fireplaces, and residential wood stoves; typically associated with homes and non-industrial sources) predominately produce CO, and all but ROG emissions show a slight increase since 1995. On-Road Mobile Sources (i.e., autos, trucks, motorcycles) are the predominant producers of Carbon Monoxide, although it has shown a notable decline since 1999 along with ROG (which includes and represents Hydrocarbons) and NOx emissions. Other-Mobile Sources (i.e., airplanes and railways) are also major contributors to CO emission although they have declined since 1995. The next largest contributor is NOx emissions which have slightly increased over time.









What This Means:

Much of the air pollution in Marin County has consistently come from On-Road Mobile Sources (vehicles) over time. The Bay Area Air Quality Management District (BAAQMD) has reported that Marin has good air quality, measured by the least number of days in excess of air quality standards. Although air quality in Marin is reported as good, primarily because of prevailing winds that blows evidence of area pollution inland, further reducing or eliminating vehicle emissions could make considerable progress towards improving air quality for Marin County as well as inadvertently affected areas. Further education about the burning of wood and the new installation or retrofit of existing fireplaces with low emissions units could also make a significant contribution to a cleaner atmosphere. However, increases in the cost of natural gas and electricity could result in increased wood

burning for heating which would offset the benefits achieved through increased emission controls on other pollution sources.

Below are descriptions of monitored key air pollutants:

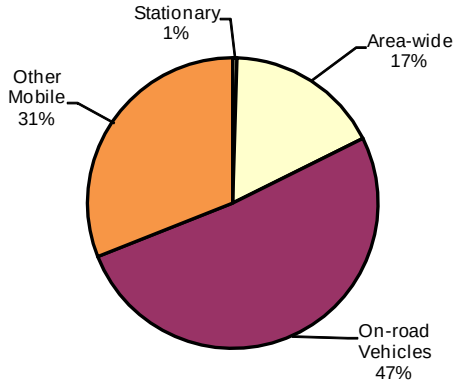
CO (Carbon Monoxide): A colorless, odorless gas resulting from the incomplete combustion of fossil fuels. About 50% of the CO emitted in urban areas is contributed by motor vehicles. CO interferes with the blood's ability to carry oxygen to the body's tissues and results in numerous adverse health effects. CO is a criteria air pollutant. This is one of the six pollutants for which there is a national ambient standard.

PM10 (Particulate Matter less than 10 microns): A major air pollutant consisting of tiny solid or liquid particles of soot, dust, smoke, fumes, and aerosols. The size of the particles (10 microns or smaller, about 0.0004 inches or less) allows them to easily enter the air sacs in the lungs where they may be deposited resulting in adverse health effects. PM10 also causes visibility reduction and is a criteria air pollutant.

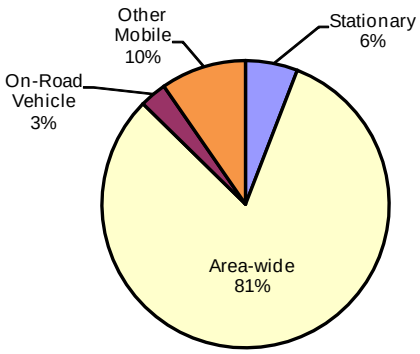
Reactive Organic Gases (ROG): A reactive chemical gas composed of hydrocarbons that react with nitrogen oxides and contribute to the formation of ozone. Also known as Volatile Organic Compounds (see VOC), or as Non-Methane Organic Compounds (NMOCs). The Air Pollution Control District considers most volatile compounds containing carbon to be reactive.

Nitrogen Oxides (Oxides of Nitrogen, NOx): A general term pertaining to compounds of nitric acid (NO), nitrogen dioxide (NO2), and other oxides of nitrogen. Nitrogen oxides are typically created during combustion processes and are major contributors to smog formation and acid deposition. NO2 is a criteria air pollutant, and may result in numerous adverse health effects; it absorbs blue light, resulting in a brownish-red cast to the atmosphere and reduced visibility.

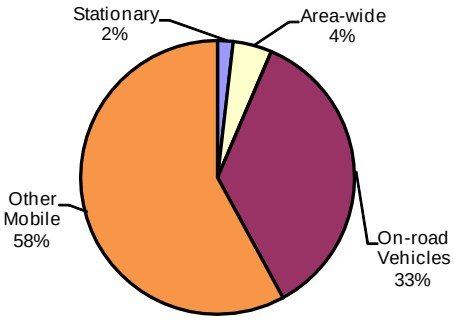
Carbon Monoxide Sources



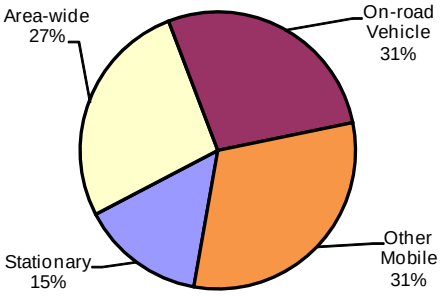
Particulate Matter Sources



Nitrogen Oxide Sources



Reactive Organic Gases



Source: California Air Resources Board - 2009 Almanac Data

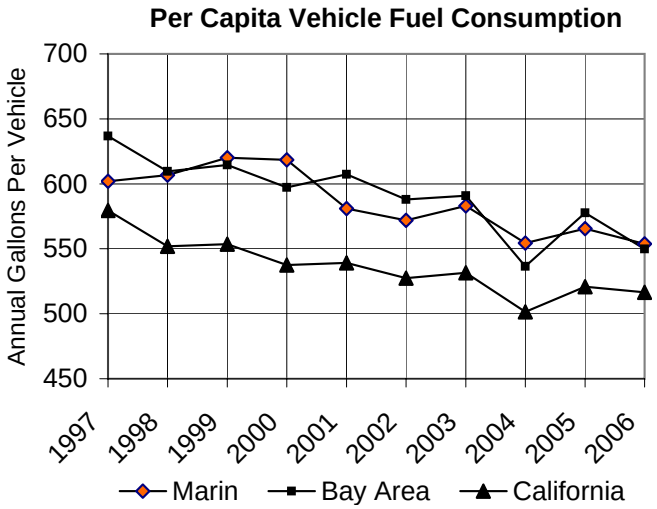
Total Fuel Consumption Slowly Decreasing in Marin

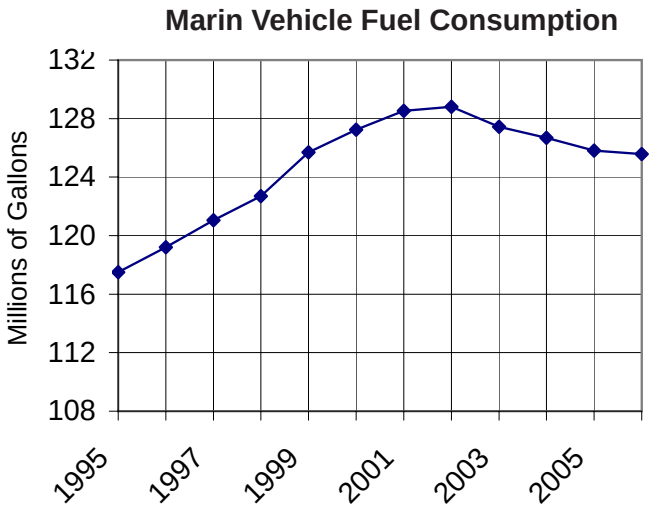
From 1994 to 2005 fuel consumption increased 6.7% from 117.9 million gallons to 125.8 million gallons annually. During this period, fuel consumption grew steadily until 2002, where a peak of 128.8 million gallons was reached. By 2006 consumption decreased back down to 125.6 million gallons. The decrease in fuel consumption may be attributed towards the use of more fuel efficient vehicles.

Marin's annual consumption per vehicle increased overall 6.7% from 566.2 gallons per vehicle in 1996 to a high of 618.4 gallons per vehicle in 2000. A significant drop in consumption levels occurred in 2004, down to a low of 529 gallons per vehicle, which then increased back up to 553 gallons in 2006. In general, Marin's per capita vehicle consumption levels tended to be slightly less than those for the Bay Area but higher than the State as a whole.

What This Means:

Increases in fuel consumption are usually attributable to more vehicles being on the road. For Marin however, the population has not increased sharply and the number of registered vehicles actually decreased between 1996 and 1997. Therefore, either people were driving more, were stuck in traffic more, were driving less fuel-efficient vehicles, or a combination of the above. Similarly, the per vehicle consumption decrease in 2001 may be attributed to higher unemployment which reduces commute travel and associated congestion, both of which affect consumption rates. Although the economy was expanding in 2005, continued higher fuel costs may have encouraged less driving or the purchase of more fuel-efficient vehicles.





Sources: Caltrans Transportation and Planning Program, State Department of Motor Vehicles

Marin Waste Diversions Far Exceed Disposal, and Generation Rate is Declining

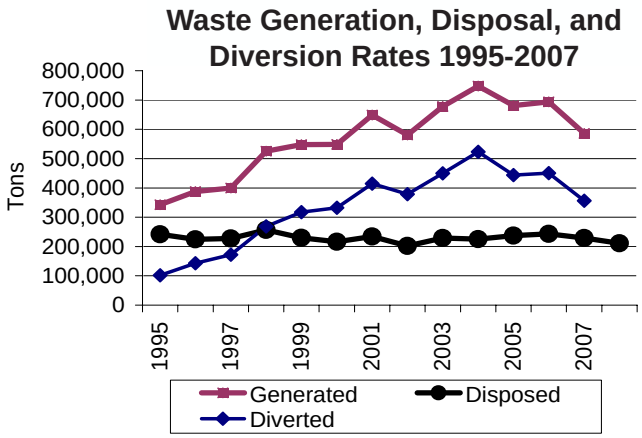
From 1995 to 2007, waste generation in Marin increased 71% from 342,852 tons annually to 585,760 tons. While generation rates decreased to 580,865 tons in 2002, rates rebounded sharply by 2004 to a high of 747,979, where the amount of diverted waste peaked at 70%, before declining once again by 2007. At the same time, tonnage diverted (recycled) increased from 30% to 61% of the waste stream, a remarkable 251% increase. The significant increases in diverted waste have absorbed the additional tons of waste generated, which has kept the amount of disposed waste to an average of 229,000 tons annually over the study period. Recently, however, disposed waste has trended downward from 243,038 tons in 2007 to 210,849 tons in 2008.

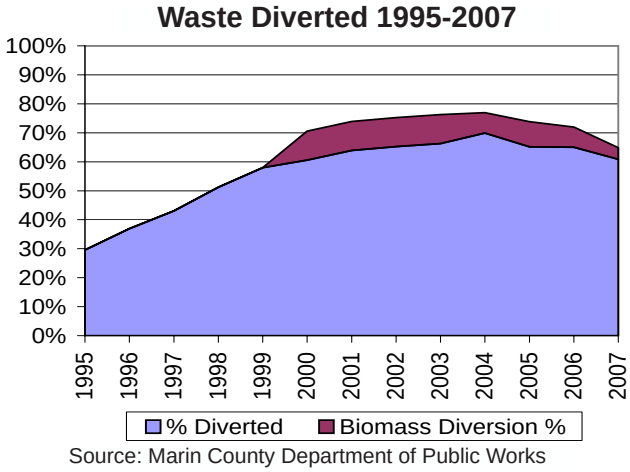
Marin County was one of the few counties that met the provisions of Assembly Bill 939 which required at least 50% of generated waste to be diverted by 2000. Marin has recycled 61% of the county's waste in 2000 and 68% by 2005. Beginning in 2000, biomass diversion (mainly scrap wood from construction debris and tree removal) was added to total diverted waste figures. As a result, an additional 10% of the waste stream was diverted, effectively increasing Marin's diversion rate to 76% in 2003. However, by 2007, biomass diversion dropped to 4% of total generated waste. The only active disposal site in Marin County is Redwood Landfill, located north of Novato. West Marin Sanitary Landfill, north of Point Reyes Station, is closed and no longer receives solid waste. Marin disposed of 92% of its waste at Redwood Landfill in 2004. Both waste exports and imports have increased, from 4,654 tons in 1996 to 96,213 tons in 2006, while imports have ranged from 33,510 tons in 1998 to 217,739 tons in 2006, respectively. Notably in 1999, the amount of waste Marin imported from other counties spiked 460% while waste exports jumped 234%.

All eight of Marin's waste haulers operate residential recycling programs and collect glass, paper (cardboard, junk mail, newspaper), tin and aluminum cans, and plastic (#1 and 2). Businesses have the option of recycling as well.

What This Means:

One principle of sustainability is that all waste material from one process should be treated as the raw material for another. The county increased the stream of diverted waste from landfills by recycling and promoting the highest and best use of discarded materials through redesign, reuse, and composting. This increases the lifespan of the existing landfill and reduces the risk of groundwater contamination and other pollution that may generate from waste disposal facilities. However, the amount of waste imported from other regions could ultimately impact Marin's ability to dispose of its own waste. In addition, the transportation distances required for inter-county disposal contributes towards increased vehicle emissions.





Source: Marin County Department of Public Works
Waste Management Division

Energy Generation by Natural Gas Remains on Top, Out of State Imports Up

In 2001 the statewide energy mix consisted of 42.7% natural gas, 12.6% nuclear, 9.4% hydroelectric, 10.4% coal, 5.1% geothermal, 2.3% organic waste, and less than 2% for oil, wind, and solar generation. While the amount of imported energy jumped from 15.4% in 2001 to 23.1% in 2001, the proportion has declined to 21.9% by 2006.

By 2006, the statewide energy usage composition consisted of 36.7% natural gas, 16.4% hydroelectric, 10.8% nuclear, 6% coal, 4.5% geothermal, and less than 2% for oil, wind, solar, and organic waste. Approximately 22% of the State's energy was imported.

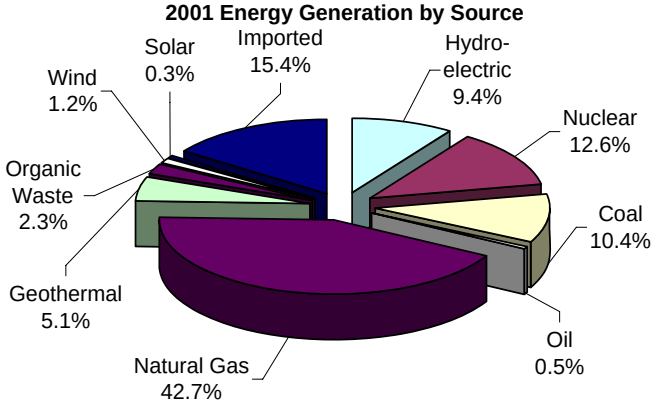
Renewable Energy in the Power Mix

In 2001, it was estimated that 21.8% of the total energy generated was produced by renewable sources, a significant decrease since 1995 when renewables accounted for 29.6% of the mix. However, the renewable share increased to 26.6% in 2002 and 27.9% in 2003 before further growing to 28.8% by 2006.

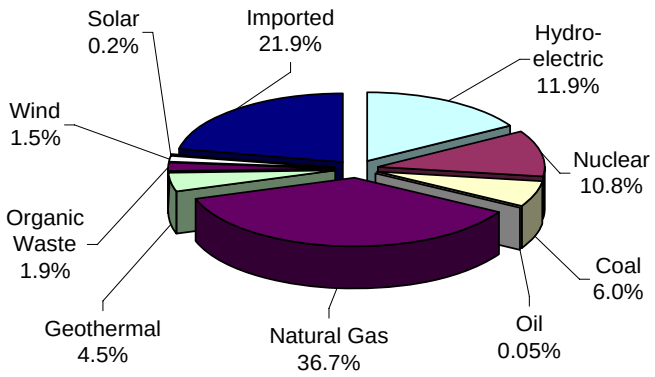
Renewable sources generally include solar, wind, hydroelectric, organic waste, and geothermal. However, some questions have been raised about organic waste and large hydroelectric power. Although organic waste is generally considered renewable, it is less preferred than other renewable sources because the burning required to create this energy creates air emissions that impact the environment.

Energy generated from small hydroelectric dams is considered renewable; however, large hydroelectric dams may create negative impacts on local wildlife and stream and river habitats. While the energy crisis of 2001 generated considerable interest in renewable energy sources, The California Energy Commission reports that the majority of added power plants will utilize natural gas resources. (Integrated Energy Policy Report, 2007).

2001 Energy Generation by Source



2006 Energy Generation by Source

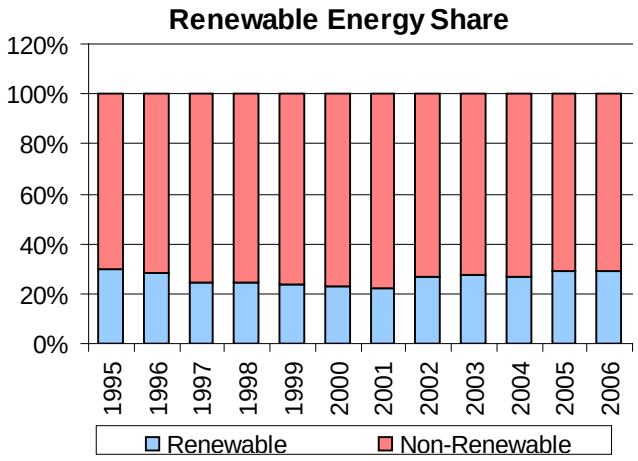


Source: California Energy Commission

These power plants are expected to more efficiently produce power than older gas power plants.

What This Means:

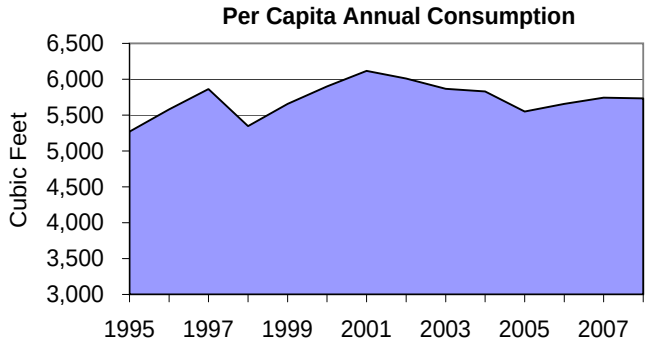
Increasing our reliance on renewable sources of energy while decreasing our reliance on non-renewable sources will have a beneficial impact on the environment. This is because we can reduce the impact of fossil fuels that are removed from the earth's crust and emitted into our air, soil, and water. In addition to creating a healthier environment, an increased reliance on renewable energy sources could result in a more stable economy and social system in the future because such a system would be based on infinite rather than finite resources and the attendant geopolitical issues of extracting non-renewable resources from other countries. Conversely, the increasing use of natural gas to generate power consumes more of a finite resource, one which is also widely used for heating, and exposes the supply of electrical energy to price fluctuations that occur due to the laws of supply and demand.



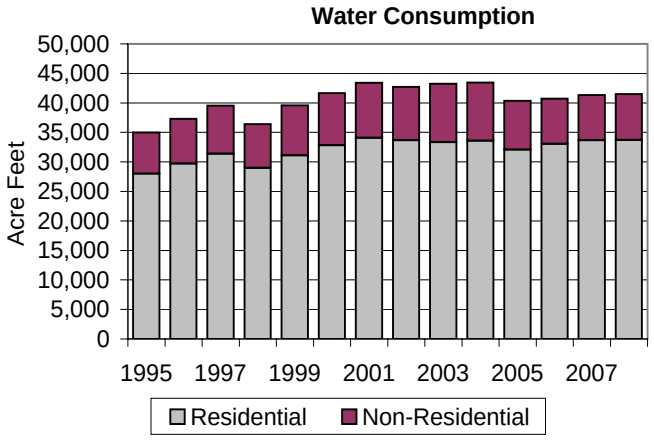
Source: California Energy Commission

Residential Per Capita Consumption Varies, Non-Residential Use Decreasing

Total water consumption increased overall by 24% from a low of 34,960 acre feet in 1995 to a high of 43,396 acre feet in 2001. After averaging 43,140 acre feet through 2004, water consumption fell to 40,352 acre feet in 2005, but slightly increased 3% to 41,508 acre feet by 2008. Residential consumption rates increased 21.7% from a low of 28,004 acre feet in 1995 to a high of 34,085 acre feet in 2001. After slowly declining 6% by 2005, residential consumption rebounded 5.2% to 33,730 acre feet by 2008. Non-residential water consumption fluctuated upwards 42.2% from a low of 6,956 acre feet in 1995 to a high of 9,891 acre feet in 2003. After declining 23% to 7,630 acre feet by 2007, non-residential consumption slightly rebounded to 7,777 acre feet in 2008.



Sources: Marin Municipal Water District, North Marin Water District



The statistics used include data from the Marin Municipal Water District (MMWD) and the North Marin Water District (NMWD) service areas. Those using well water or who are served by other water agencies are not included in this analysis. Conservation efforts have been intense in light of Marin's limited sources for water. Meanwhile, capacity at both MMWD's seven reservoirs and NMWD's Stafford Lake reservoir have remained static. Contracts exist with the Sonoma County Water Agency to deliver additional water to both districts, however, the current pipeline has limited capacity and a new pipeline approved by voters in 1992 has not been constructed. The MMWD is currently evaluating desalination as a means to provide additional supply. Even with strong conservation measures in place, annual countywide residential per capita water usage between 1995 and 2001 increased 16% from a low of 5,269 cubic feet per resident to a high of 6,116 cu. ft., but later declined 7.7% by 2005. As of 2008, this per capita rate rebounded slightly to 5,732 cu. ft., a 3.3% increase.

What This Means:

Conservation efforts have been utilized to limit water usage. Low flow showerheads, toilets, high efficiency clothes washers, and drought-tolerant landscaping are saving water and saving residents money. However, a substantial amount of water is used for irrigation, agriculture, and other industries. Reduced water consumption means that there is more available during dry years and leaves more water for the streams and creeks that feed Marin's coastal environments and San Francisco Bay. However, steady increases in per capita water usage threatens Marin County's ability to sustain itself on water collected locally and increases the need to rely on imported water and other alternative sources such as desalination.

NMWD gets roughly 75% of its water supply from the Russian River while MMWD receives 25% from this source. This means that Marin residents are relying on imported water. If the county experiences a drought, residents may have to cut their water usage by 65%. Because water is a precious resource, needed by everyone for drinking and a variety of other uses, sustainable water resource management is needed to help allow for an adequate water supply for all users.

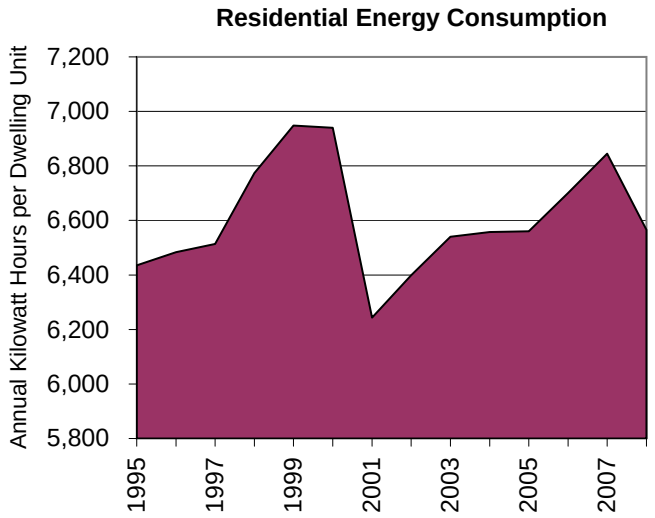
Energy Crises has Tempering Effect, but Usage Trends Upward Over Time

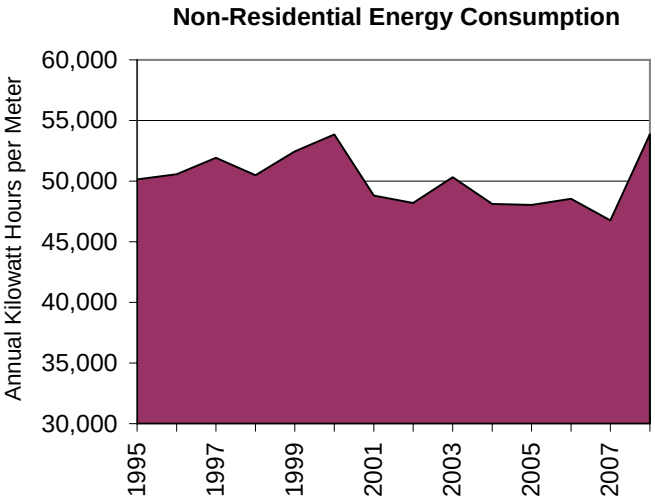
Residential:

Residential energy consumption climbed significantly between 1995 and 2000. Average consumption per dwelling unit was 6,435 kilowatt hours (kWh) in 1995 followed by significant annual increases to peak of 6,940 kWh by 2000. Total consumption increased 11.3% from 1995 to 2000, from 637 million kWh to 709 million kWh. The per capita rate increased 8% during the same period. However, the energy crisis of 2001 with its attendant price increases and conservation incentives reduced per capita consumption 10% to a low of 6,244 kWh. Total energy usage fell 10% to a low of 641 kWh during this same period. However, by 2007 per capita energy consumption increased 9.6% to 6,845 kWh while total energy usage grew 14.5% to a high of 734 million kWh However, as of 2008, per capita consumption dipped 4.1% to 6,565 Kwh and total energy usage decreased 3.2% to 710 million Kwh.

Non-Residential:

Non-residential energy consumption followed similar patterns as residential energy use, increasing from 50,137 kWh per meter in 1995 to a peak of 53,853 kWh per meter in 2000, a 7.7% increase. During the same period, total consumption increased 13.8% from 671 million kWh to a high of 768 million kWh before decreasing to 717 million kWh in 2001. However, unique to non-residential consumption, 2003 reflects an increase in per capita kWh, coinciding with an increase in total accounts while 2004 shows a per capita kWh decrease but an increase in total accounts. In 2005, a very small increase is evident in both total number of accounts and per capita kWh. From 2005 to 2006, 2,233 accounts were added and per capita kWh only increased by 149 kWh. This suggests that although more people are buying energy, energy conservation is increasing. As of 2008, however, per capita energy consumption spiked 15.2% to a high of 53,876 kWh and total energy usage increased 7.6% to 756 million kWh.





Source: California Energy Commission

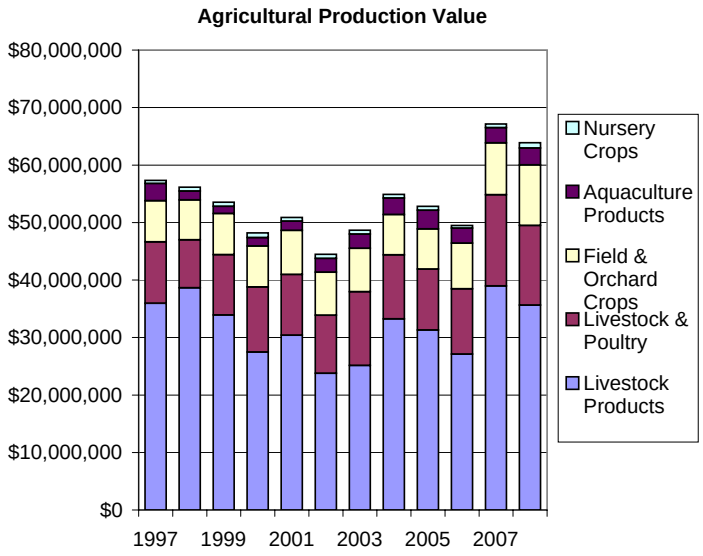
What This Means:

Residential uses account for approximately half of all electricity use in Marin, while commercial buildings use approximately one-third. There is a significant opportunity to reduce energy consumption through simple weatherization measures and advanced measures such as such as window retrofits and replacing old furnaces with high-efficiency ones. About 75% of energy used in buildings is wasted due to poor design and construction and inefficient appliances.

* A kilowatt-hour (kWh) is the equivalent of burning ten 100-watt light bulbs on for one hour.

Agriculture Production Jumps to New Highs

Overall, the production value of agricultural products increased 13.7% from $57.34 million in 1997 to $63.88 million in 2008. It is important to note the rebound from 2002 to 2004 ($10 million) after a significant dip from 1997 to 2002 (approx. $13 million). Although the production value again dipped from 2004 to 2006, total production jumped 36% to a high of $67.13 million in 2007. Livestock products (milk, dairy), Marin's leading agricultural industry, has fluctuated significantly but appears to be recovering from the lows in 2000-2003. Livestock and poultry production value has varied by $1-2 million since 1997 ($10,664,088) until 2005 (10,631,673), remaining above the $10 million mark since its lowest point in 1999 ($8,330,921). Production grew 44% to a high of $15.87 million in 2007 before falling to $13.87 million in 2008.



Source: Marin County Department of Agriculture, Weights, and Measures

Field and orchard crops have remained relatively stable in ranging from the low to high $7 millions per year from 1997 to 2006, peaking at $9.03 million in 2007. The total value of nursery crops has fluctuated since 1997 peaking at $813,686 (a 33% increase) in 2000, with a downturn of 21% from 2000 to a low of $453,655 in 2006. By 2008, nursery crop production recovered 103% to a high of $921,975. Aquaculture had a production value of $3 million in 1997, dropping 50% in 1998 and gradually recovering to such a degree that by 2004, it was approximately 5% below its peak value. In 2005, the value of aquaculture products breached the $3 million mark for the first time since 1997; setting a new record high of $3,264,910. However, by 2008, this value fell to $2.91 million.

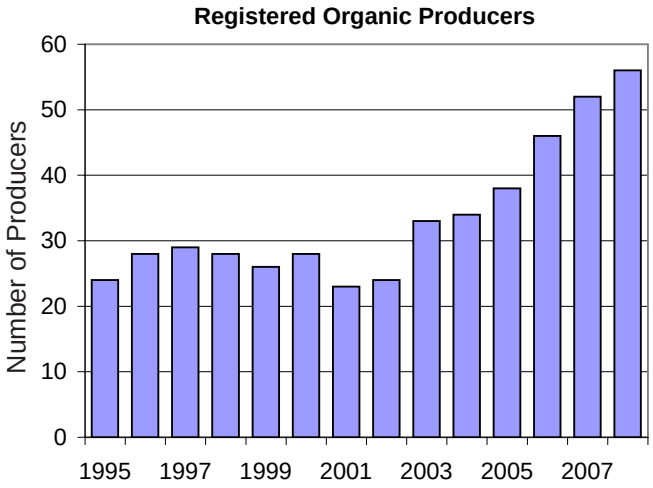
What this means:

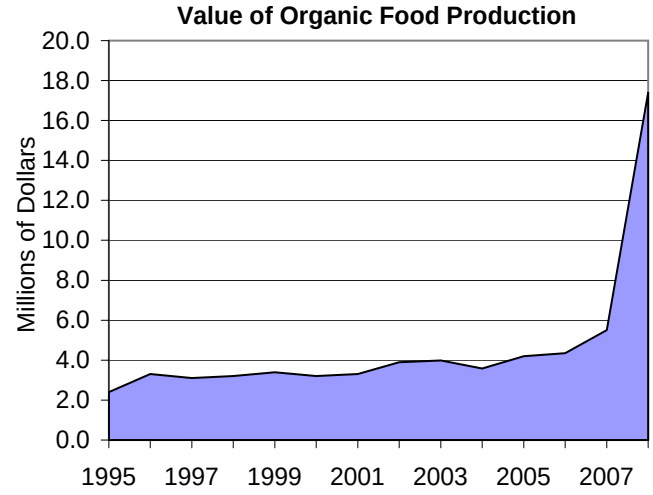
Agriculture is an important component of Marin County utilizing over one-third of the county's land area. While Marin's soils are not prime for the purposes of raising field crops, sufficient grazing lands for both livestock and dairy operations allow these important aspects of the economy to function. Agriculture is clearly affected by environmental factors, competition from corporate agriculture, increasing production costs, supply and demand, and periods of severe weather, which affect output and revenue which in turn affect agricultural viability. Additionally, regulatory and permit processes along with intergenerational transfer of farms pose additional challenges. On the other hand, many of Marin's agricultural operations have achieved success through production of value-added products that are not as likely to compete with mass-produced products.

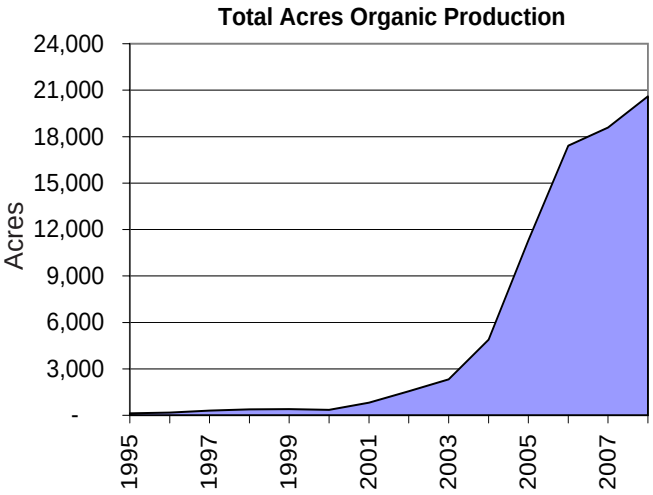
Significant Increases in Organic Production Gains and Value

The number of acres of land devoted to organic production has significantly grown from 124 acres in 1995 to over 20,598 acres in 2008, a whopping 16,500% increase. The number of registered organic growers hovered in the mid-20's between 1995 and 2002, when it jumped to 33 in 2003 and steadily increased to 56 by 2008.

The value of organic production rose from $2.4 million in 1995 to $3.3 million in 1996. The value remained fairly constant between 1996 and 2001, ranging from $3.1 million to $3.4 million, but then increased to $4 million in 2003. However, even with the increases in growers and acreage, value decreased to $3.6 million in 2004. Increases in the value of organic farming products were expected to follow the larger amount of dedicated land because organic crops typically take at least a year in cycle to match the productivity of conventional crops. As expected the value has spiked to a new high of $17.4 million in 2007, reflecting an increase in production resulting from the substantial increase in acreage.







Source: Marin County Department of Agriculture, Weights, and Measures

What this means:

An increase in organic production results in an increased availability of food products without residual pesticides or toxins when they reach the consumer. Consumers who have access to this food are less likely to be exposed to food-related toxins that can be linked to health disorders in humans. Food and silage produced organically also benefit the environments by not introducing toxins into the air, soil and water. This is beneficial for fish, vegetation and other wildlife, and can also reduce the amount of chemicals that need to be removed from water in Marin reservoirs during water treatment. As traditional agricultural operations in Marin have faced increasing challenges, organic production provides an opportunity to build a niche market that is experiencing increasing demand for products. Organic production creates diversity among the products available to residents of Marin County. The goods generated by organic farms offer healthy choices and an alternative to mass produced or chemically treated foods. Also, organic production is an optimal way of protecting the environment while still meeting the County's goal of preserving agricultural land in order to increase community food security.

Taxable Sales Follows Economic Trends, but Marin Less Volatile than Bay Area

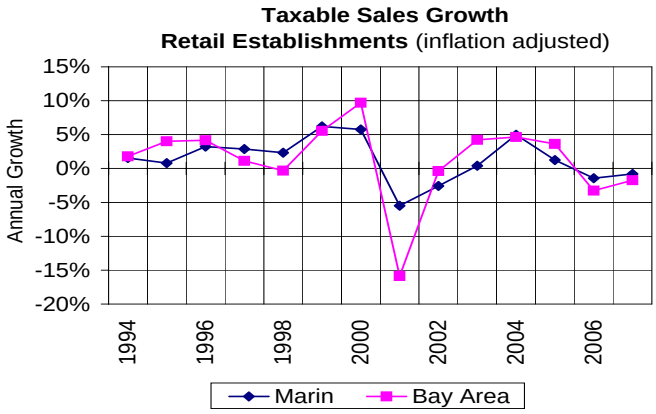
Retail Establishments:

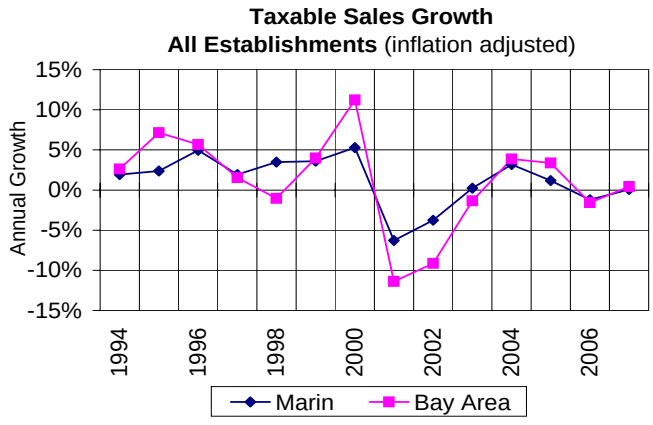
Per capita retail sales in Marin increased 68% between 1994 and 2007, from $7,920 to $13,307. This is a net increase of 30% when adjusted for inflation. Per capita retail sales in the Bay Area increased by 24.4% after inflation during the same period and saw a much more significant drop in 2001 (15.8%). Between 2000 and 2002, annual per capita spending in Marin decreased by $376 compared to a decrease of $1,211 for the Bay Area.

Taxable retail sales in Marin were $1.88 billion in 1994, which climbed to $2.96 billion in 2000, then dipped to $2.9 billion in 2003, and finally peaked to a new high of $3.3 billion in 2007. This represents an increase of 75.6% (37.7% after inflation). There were 2,988 retail establishments with average annual sales of $629,117 in 1994; this increased to 4,149 establishments in 2007 with sales averaging $795,726. While the number of retail establishments has increased every year except 1996 and 2006, sales per establishment peaked in 2000 at $871,110. After inflation, sales per establishment increased 26.5% between 1994 and 2007.

All Establishments:

Per capita sales for all establishments in Marin increased 64% between 1994 and 2005, from $10,806 to $17,724, a 22.3% increase after inflation. For the Bay Area, per capita sales increased to $17,137 or 12.5% (after inflation) during the same period. Total taxable sales in Marin rose from $2.56 billion in 1994 to $4.4 billion in 2007. This is an increase of 71.5% (29.8% after inflation). There were 12,059 establishments in Marin with average annual sales of $212,673 in 1994 and 10,851 establishments with average sales of $405,233 in 2007. Examining Marin's total establishments reveals that Marin's sales per establishment grew 90.5% while the number of establishments declined by 1,200 or 10% during this same period. As with retail establishments, total sales and per capita sales both declined in the early 2000's. Marin's per capita sales declined 5% between 2000 and 2002 while Bay Area per capita sales shrunk 15.2%.





Source: State Board of Equalization

What this means:

Taxable sales reflect purchasing activity of both durable and non-durable goods with some exceptions, such as food. Sales tax figures are indicative of overall growth in both the retail and non-retail sectors. After-inflation increases in per capita sales indicate increased individual spending patterns and/or increased activity resulting from sales originating in the county to individuals or entities outside of the county. Increased taxable sales result in increased sales tax revenue, which helps fund needed government services that otherwise would not be funded or require funding from another source.

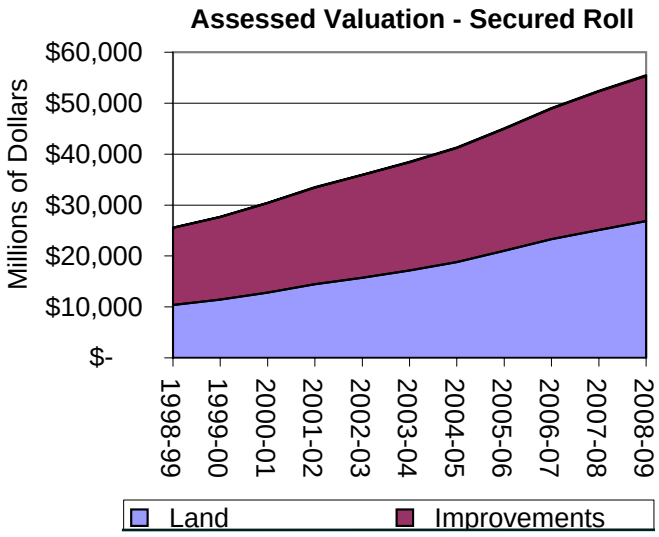
Sales tax "leakage" occurs when the residents of one jurisdiction shop elsewhere, which results in additional tax revenue for other jurisdictions. Net declines in per capita taxable sales outside of economic cycle factors can be indicative of this situation. As evidenced by the data, Marin County does not suffer from significant sales tax leakage to other counties; however leakage within the county from one city to another could be potentially significant.

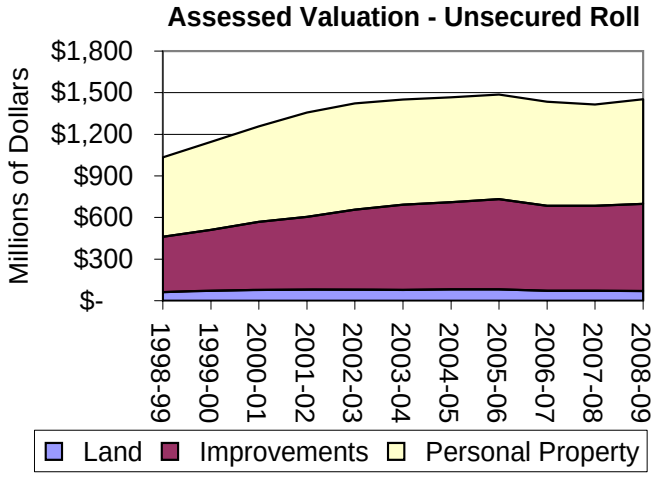
Assessed Valuation Increases Sharply, Even with Proposition 13 Cap

Marin's total net assessed valuation has increased from $25.6 billion from the 1998-99 fiscal year (FY) to $56.9 billion in FY 2008-09, a 122% increase. The secured roll land valuation, which includes real estate, increased 159% from $10.4 billion to $26.9 billion during the same period. Improvement valuation (e.g. houses or commercial buildings) increased 88% from $15.1 billion to $28.5 billion in FY 2008-09. Property resales typically result in increases in the assessed valuation of a property for both land and improvements while remodeling or additions only affect the improvement valuation. The unsecured roll is much smaller but increased 33% from $574 million in FY 1998-99 to a high of $766 million in FY 2002-03. Personal property valuation has slowly decreased from 2002-2003 levels to $730 million in FY 2007-08. Finally, as of FY 2008-09, personal property rebounded 6% to $753 million.

What this means:

Assessed Valuation is the basis on which property taxes are calculated. Unlike home sales prices, which capture only the turnover in housing and thus establish a mean and median home price, assessed valuation is a more accurate reflection of potential revenue as it includes both residential and commercial properties and accounts for the 2% annual cap on basis appreciation through Proposition 13 and exemptions for homeowners and seniors. Sale of a property or home improvements result in the basis being adjusted to the purchase price of the property or the improved value at the time of construction. Future appreciation is again capped at 2% per year until the next sale or round of improvements to the property. Thus, a rapid turnover of properties or significant home improvement activity results in basis appreciation well above the 2% cap and increased tax revenues.

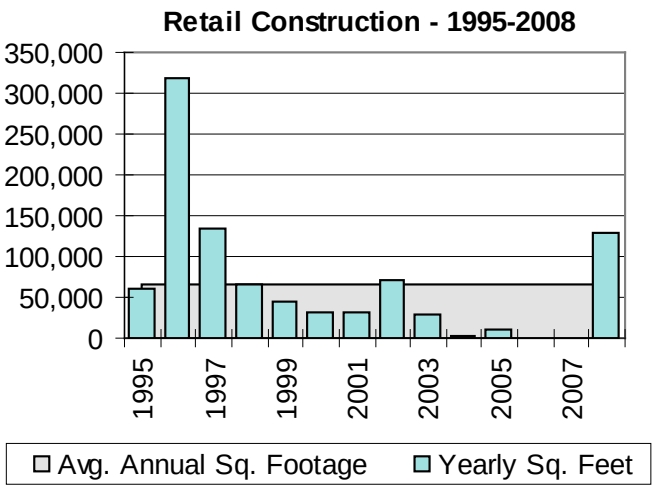




Source: Marin Assessor Recorder

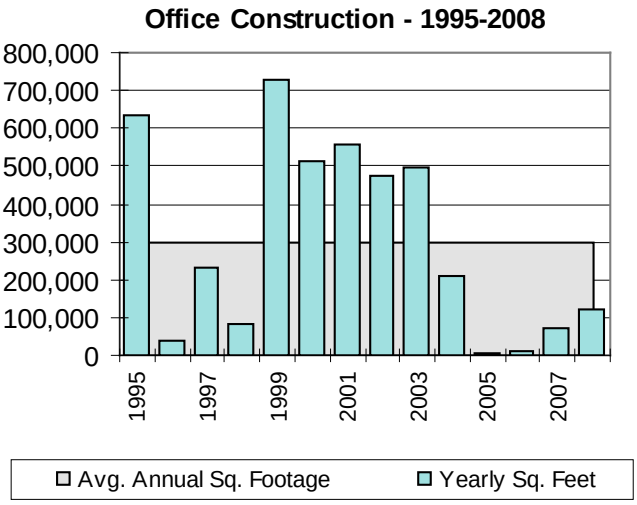
Low Retail and Office Construction Trends, but Industrial Construction Jumps

The amount of non-residential square feet added each year has varied widely between office, retail, and industrial uses due to various trends in economic development. In 1999, a total of 694,793 square feet of non-residential construction was added, which peaked at 856,868 square feet in 1999, then decreased significantly to a low of 12,413 square feet in 2006. However, the amount constructed rebounded to 280,964 square feet in 2008.



Office:

Construction of office space has resulted in nearly 4 million square feet with about 297,692 square feet annually being added to the county's stock, on average, since 1995. The largest single increase occurred in 1999 when 728,760 square feet was constructed. 1995 saw the second largest single increase with 633,940 square feet. 2000, 2001, 2002, and 2003 all saw significant construction, averaging more than 500,000 square feet each year. However, only 5,300 square feet was constructed in 2005 due to significant vacancies in existing office space. Approximately 118,792 square feet of office space was constructed, primarily in the City of Novato, in 2008.



Retail:

Retail space has increased by an average of 66,397 square feet annually from 1995 to 2008 for a total of 926,815 square feet. The largest single increase was in 1996 with 317,420 square feet. Since 1997, the rate of retail construction has slowed dramatically; only 242,950 square feet of retail space were constructed between 1998 and 2002, but the 2002 construction of 71,118 square feet was an increase from the previous slower years. Since 2002, retail office space construction has come to a near halt with only 2,180 sq. ft constructed in 2004, 9,883 square feet in 2005, and no new construction in 2006 and 2007. As of 2008, 130,050 square feet was constructed, primarily due to the completion of the hotel, office, and 126 unit residential mixed use

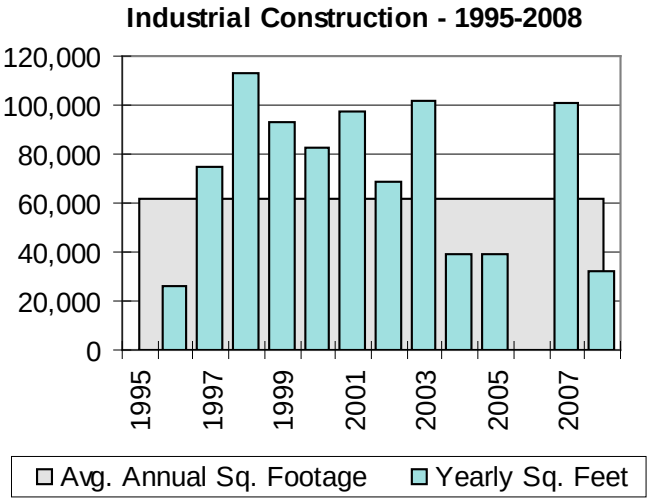
project at Larkspur Landing on the former sanitary district property.

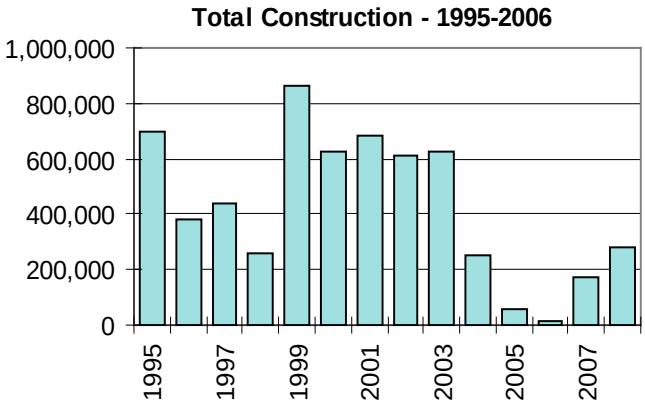
Industrial:

Nearly 869,000 square feet of industrial space has been constructed since 1995, an average of 62,082 square feet per year. There were no industrial projects completed in 1995, but since then there has been relative stability in the number of square feet added annually, except for 2002 and 2004 when 69,122 and 38,947 square feet were added, respectively. Similar to retail, there was no additional industrial construction in 2006, but by 2008, an additional 133,000 square feet was added.

What this means:

Continued economic and employment growth is contingent on attracting businesses into the county as well as providing expansion space for businesses already here. While retail space can provide significant employment; businesses occupying office space and, to a lesser degree, industrial space tend to provide employment that has higher wage and benefit compensation than retail. Some additional retail space will be necessary to meet the needs of the county's residents but as the economy improves, additional office and industrial space will be crucial to provide space for expansion of local high-wage employers. The lack of sufficient office space during the last economic boom was one factor resulting in the outflow of businesses from the county.

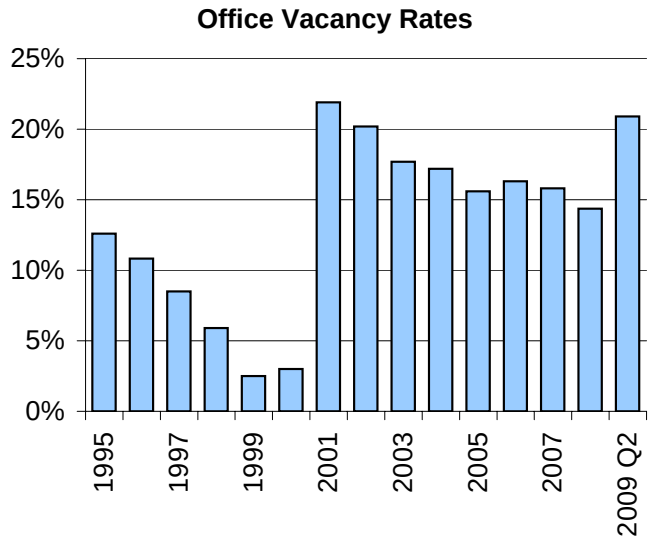




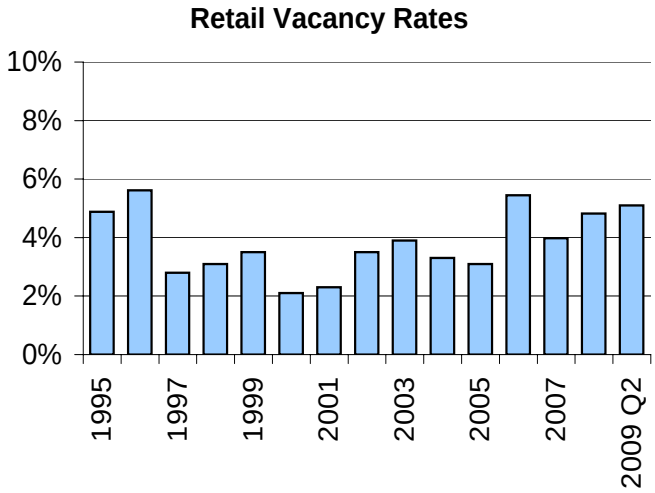
Source: Marin County Community Development Agency

Office Vacancy Rate is Volatile, Retail and Industrial More Stable

Vacancy rates have fluctuated considerably between 1995 and 2008, especially for office space. While some of this is due to the addition of available space through new construction, the health of the economy has been more of a determining factor. For example, in 1995 when over 600,000 square feet of new office space was completed, the vacancy rate actually declined from 1994. Vacancy rates for all non-residential categories have been below 5% for varying periods of time; a benchmark indicating the market is not well balanced. However, the office market starting in late 2000 shifted dramatically, resulting in extremely high vacancy rates while retail and industrial rates were minimally affected during the same period.



The office vacancy rate has remained higher than average for the 2001-2005 period, although it has shown a decrease since its nearly 22% peak in 2001. While the economy is showing signs of recovery from this recession, it will take time for the significant amount of vacant office space added to the county's stock to be absorbed. On the other hand, with the recent lack of substantial office projects, future years could see extremely low vacancies once again. This pattern is also possible for industrial vacancy rates since relatively little industrial space is being added.

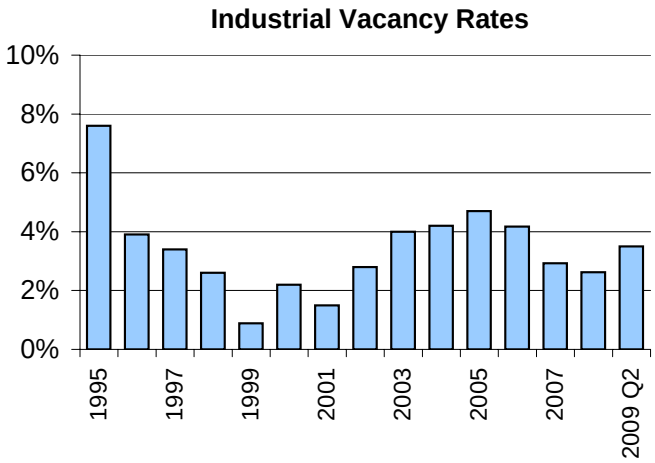


Office:

The office vacancy rate was 12.6% in 1995 and plummeted to 2.5% in 1999 before increasing slightly to 3.0% in 2000. Even as a considerable amount of office space had been constructed in the late 1990's, demand far exceeded supply. Along with the downturn in the economy, construction activity between1998,and 2000 helped to turn the office market upside down with vacancy rates skyrocketing to 21.9% in 2001. By 2008, rates had gradually decreased to 14.4% but this level was still higher than the previous high point in 1995. However, as of the 2nd quarter of 2009, the vacancy rate rebounded to 20.9% due to the current severe recession.

Retail:

Retail space remained relatively stable in the mid-1990's with vacancies around 5%. The rate increased to 5.6% in 1996, a year that saw over 317,000 square feet of retail space added, nearly twice the annual average over the last decade. From 1997 to 2005 vacancy rates hovered around 3% with a high of 3.9% in 2003 and a low of 2.1% in 2000. Over the following four years, rates grew to fluctuate between 4% and 5.5%. As of the 2nd quarter of 2009, the vacancy rate was 5.1%. Unlike the office market, retail construction has been relatively incremental and the sector has been affected less by the economic downturn compared to other sectors.



Source: Orion Partners, Keegan and Coppin Real Estate

Industrial:

Industrial vacancy rates, after plummeting from a high of 7.6% in 1995, have varied from less than 1% to just over 4%. From 1996 to 1999, rates dropped annually to a paltry 0.9% before increasing to 2.2% in 2000. The 2001 and 2002 vacancy rates varied only slightly from 2000 with rates of 1.5% and 2.8%, respectively. By 2005, the vacancy rate increased to 4.7% before falling to 3.5% by the 2nd quarter of 2009, still below the accepted 5% level of a balanced market.

What this means:

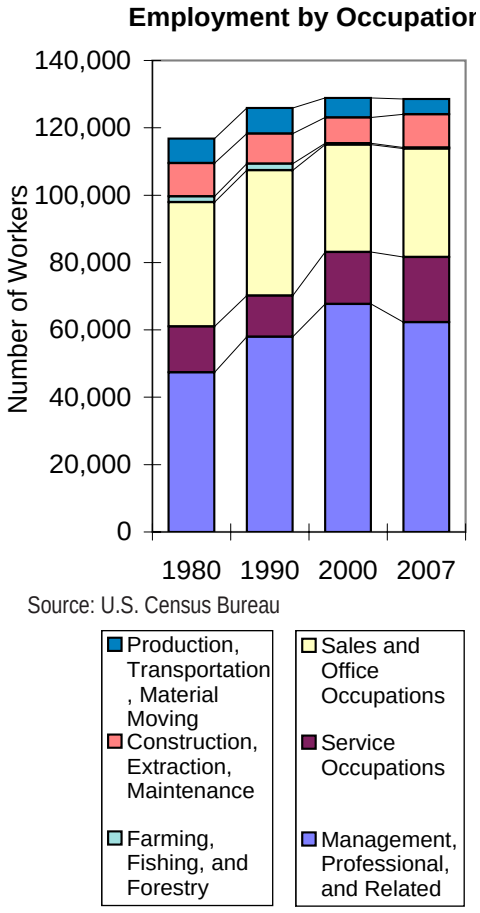
Non-residential vacancy rates are affected by a variety of factors including the overall health of the economy, construction of new space, and business growth, expansion, and relocation. The vacancy rate affects rental rates and to some degree, vice-versa. While a low vacancy rate is attractive to property owners due to higher potential rent, higher rents can discourage business owners seeking to expand or locate here considering the overall higher cost of doing business in Marin.

Professionals, Managers, Salespeople Comprise Majority of Marin's Workforce

The workforce in Marin (persons who live in Marin, but do not necessarily work here) increased from 116,810 in 1980 to 125,886 in 1990, and then to 128,855 by 2000. This reflects a 10.3% in the total number of Marin resident workers since 1980. By 2007, employment slightly decreased to 128,582. The number of Management and Professional employees significantly increased from 47,416 in 1980 to 67,674 in 2000, but decreased to 62,319 in 2007. This group represents 48.5% of Marin's workforce; this share is up 8% since 1980. Service occupation employees have also grown from 13,617 workers in 1980 to 15,446 in 2000, and then to 19,296 by 2007. This group represents 15% of all jobs; up 3.3% since 1980. While the number of Marin residents employed in Management and Professional occupations as well as in Service occupations increased, the number of residents in all other categories decreased.

Although employment in the Sales and Office sectors increased from 36,885 to 37,193 between 1980 and 1990, they then decreased to 31,867 in 2000. By 2007, employment rebounded to 32,184, representing 25% of the county's total workforce; down 4.5% since 1980. Residents working in Construction, Extraction & Maintenance fell from 9,816 in 1980 to 7,706 in 2000, but increased 28.3% to 9,887 by 2007. The Construction, Extraction & Maintenance sector represents 7.7% of the workforce.

Those employed in the Production, Transportation & Material Moving sectors dropped from 7,304 in 1980 or 6.3% of the workforce to 5,788 in 2000 or 4.5%. By 2007, employees in this group again fell to 4,557 and represented 3.5% of the total workforce. Farming, Fishing and Forestry saw the largest decrease in resident workers. With 1,772 employed in 1980, the number tumbled to 374 in 2000 and further slipped to 339 in 2007, an 81% decrease since 1980. This sector composes only .3% of the county's workforce.



Source: U.S. Census Bureau

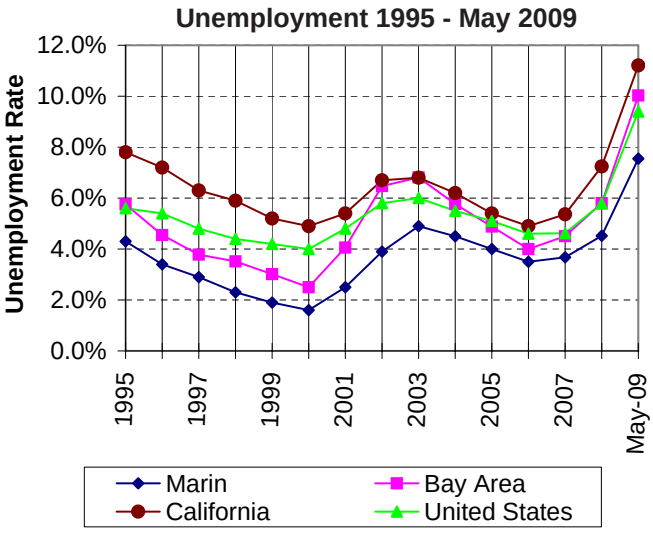
Note: The 2007 American Community Survey utilizes estimated data. As a result, there is a margin of error.

What this means:

A diverse workforce has persons in a variety of occupations. Traditionally, management, professionals, and sales persons have higher incomes than laborers and clerical workers. As occupational data is based on where an employee lives, it is clear that most of Marin's workforce hold higher earning positions. This data compared with employment data, which is employer based, shows why there is a significant amount of commuting in and out of the County; the workers living inside and outside Marin don't (or can't) necessarily live where their jobs are.

Marin's Unemployment Rate Up Due to Depressed Economy

Unemployment in the county has remained low over the study period, especially when compared with the Bay Area, California, and U.S. averages. As of May 2009, Marin's level of unemployment was 7.5% compared with 4.3% in 1995. Meanwhile, Marin's unemployment trends generally followed those of California and the U.S., but remained one to four percentage points below those averages over the study period. Between 1995 and May 2009, Marin's average unemployment rate was 3.4%, compared to 4.7% for the Bay Area, 6.1% for the State, and 5.0% nationally.



Source: Employment Development Department

While it appears that Marin's unemployment rate may continue to trend upward or flatten due to the poor economy, many of the high technology, finance and insurance, and manufacturing jobs that employed many in Marin's workforce may be slow to return.

What this means:

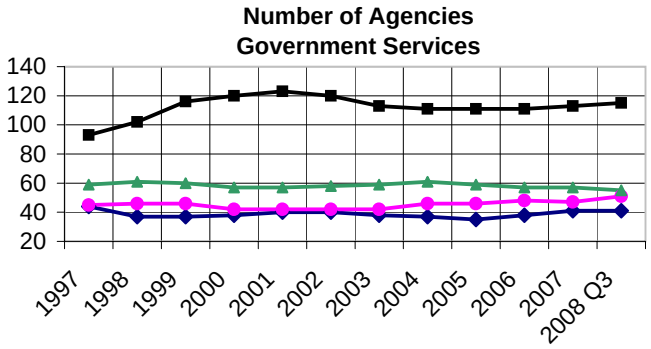
Unemployment rates are indicative of the overall health of the economy. Exceptionally low unemployment can result in labor shortages, which drive up labor costs. Because Marin has fewer persons employed in volatile industries, the county is not affected as much as other areas when there is a downturn in the regional, state, or national economy. On the other hand, the high-tech implosion in 2000 – 2001 had a greater negative effect on Marin's economy. This indicates that a concentration of high-tech jobs was created in the 1990's. High unemployment, especially in volatile industries such as construction and manufacturing, results in less demand for local goods and services which can have secondary effects on other sectors of the economy. This trend is one factor contributing to the current weak economy and high local and national unemployment rates. It is important to note that persons who are self-employed, which includes a significant number of home-based businesses in Marin, are not included in the county's unemployment statistics.

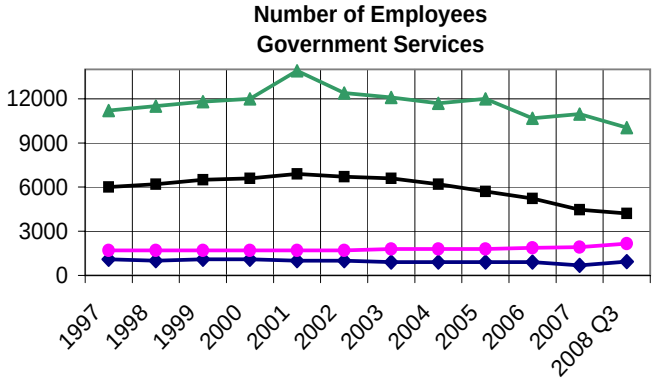
Public Sector Employment Declines; Number of Agencies Remains Stable

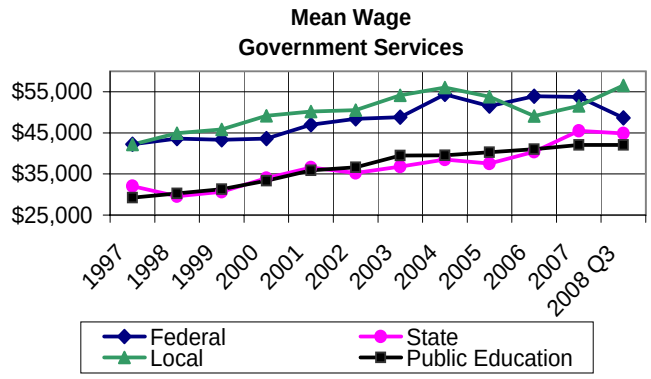
The total number of federal, state and local government service agencies has remained relatively constant between 1997 and the 3rd quarter of 2008. Overall, federal agency representation decreased 6.8% from 44 agencies in 1997 to 41 in 2008 Q3 after dipping to a low of 35 in 2005. State agencies decreased from 45 in 1997 to a low of 42 in 2000, but later grew to a high of 51 in 2008 Q3. The number of local agencies increased from 59 in 1997 to a high of 61 in 2004, but later fell to a low of 55 in 2008 Q3. Finally, the number of public education facilities was the only government service that saw significant increases, from 93 in 1997 to a peak of 123 in 2001. These facilities scaled back to 111 between 2004 and 2006 before rebounding up to 115 in 2008 Q3.

For all categories of Government Services, excluding state government, the number of employees also varied but generally declined. The number of employees maintained by local government has decreased overall 10.3% from 11,200 in 1997 to a low of 10,040 in 2008 Q3. The number of federal service employees has remained fairly consistent at 1,100 between 1997 and 2002. Since 2002, the number of employees decreased to 937 in 2008 Q3. Meanwhile, the number of State service employees increased 27% from 1,700 in 1997 to a high of 2,155 in 2008 Q3. However, 72% of this increase occurred between 2006 and 2008 Q3. Public education saw a 15% increase in employment from 6,000 in 1997 to a high of 6,900 in 2001, but has since experienced a 39% decline to a low of 4,215 employees by 2008 Q3.

Average annual wages increased in every division of Government Services. Federal service wages increased from a low of $42,255 in 1997 to a peak of $54,367 in 2004 before declining to $48,672 by 2008 Q3. State service wages peaked at $45,504 in 2007 from $32,056 in 1997. Wages slightly decreased to $44,880 in 2008 Q3. Public education wages also steadily increased from $29,252 in 1997 to $42,048 in 2008 Q3. Finally, local service wages increased from $42,197 in 1997 to $56,046 in 2004, but dropped to $49,104 by 2006. By 2008 Q3, income recovered to a high of $56,544.







Source: Employment Development Department

What this means:

The number and size of government entities usually does not fluctuate greatly. However, consolidations and reorganizations do affect the total number of agencies. Increased demand for public services does not necessarily dictate an increase in public employment as many government revenues are earmarked for specific uses that limit flexibility in funding additional programs, services, and the support staff. While there is strong pressure by taxpayers to lower government expenditures, the resulting ability of agencies to pay competitive wages decreases.

Wages Dropped While High Tech Employment Retreats to 1994 Levels

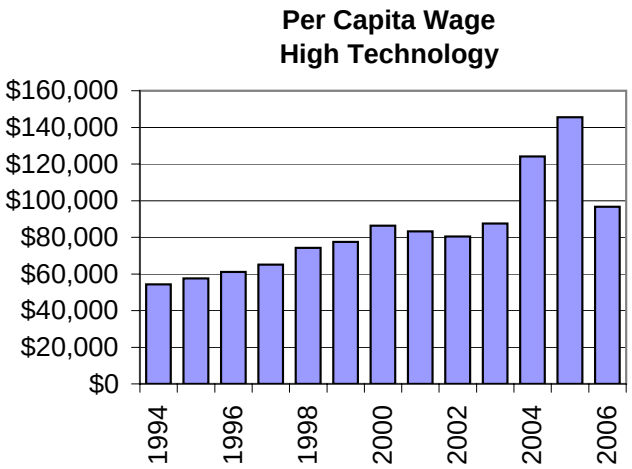
The high technology sector in Marin showed significant growth in employment through the 1990's, increasing 35% from 4,253 workers in 1994 to a peak of 6,613 in 1998 before dipping to 6,462 in 2001. However, by 2005 total workers plummeted 45.7% to a low of 3,511 workers. As of 2006, total jobs slightly rebounded to 3,929 workers. These figures do not include firms involved in motion picture production, which provide additional high tech-related employment.

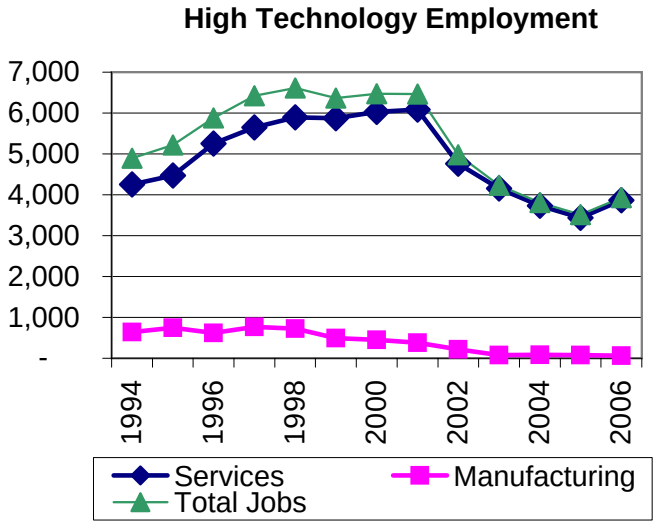
The per capita wage in the high tech sector grew 168% from $54,246 in 1994 to a high of $145,578 in 2005. However, 63% of this growth occurred between 2003 and 2005. As of 2006, the per capita wage fell 33.6% to $96,632. The overall substantial increase in per capita wages since 1994 is due to the higher wages in the software and internet industries, as well as a decrease in the number of positions.

High tech is broken into two subgroups: services, which include software development, internet services, and programming; and manufacturing, which includes hardware manufacturing and assembly. Employment in the manufacturing subgroup through 1997 fluctuated between 644 and 769 between 1994 and 1997. However, employment in manufacturing precipitously declined 91.8% from a peak of 769 in 1997 to 63 in 2006. High tech services, however, saw a 38% increase in employment from 4,253 in 1994 to a peak of 6,081 in 2001, but later plummeted 43.5% to 3,434 in 2005. As of 2006, high tech service employment slightly rebounded to 3,866.

What this means:

High tech employment, especially software, multimedia, and internet businesses, were the fastest growing employment sectors in Marin in the 1990's. With the collapse of dot.com businesses, Marin lost many high tech jobs. While there has been significant employment loss, overall wages have generally increased over time. The high wages provided by these types of jobs enable employees to afford purchasing homes in Marin. The high tech services sector is also a relatively 'clean' industry, meaning





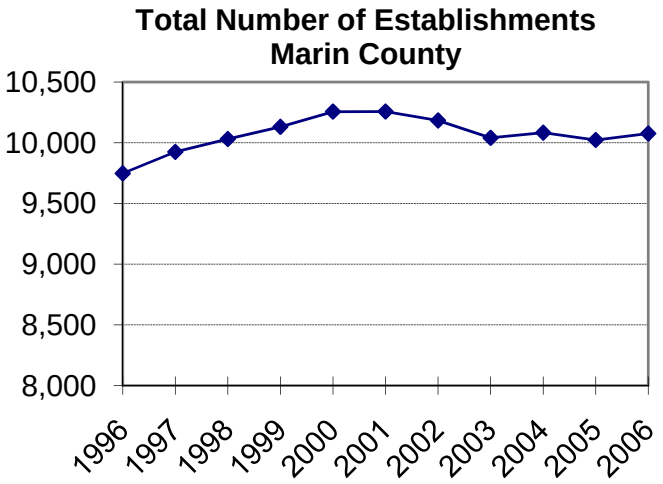
Sources: Census, Employment Development Department

that business growth in the county is avoiding the traditional 'smokestack industry' with its attendant higher rates of pollution and use of heavy metals and chemicals. High tech service employees also tend to have greater flexibility for telecommuting than their manufacturing counterparts which may help to minimize additional impacts on traffic and circulation.

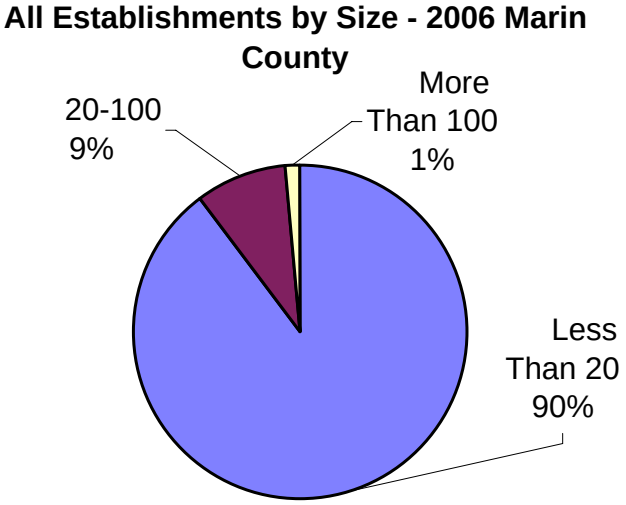
High tech manufacturing is not as clean and efficient as compared to the high tech services subgroup because the fabrication of circuit boards, silicon chips, and specialized equipment requires the use of a variety of chemicals and intensive water uses. However, since the vast majority of job growth in the high tech industry has been in the service sector; overall, high tech employment in Marin has resulted in desirable job creation from an economic, social, and environmental perspective.

Cluster Focus

Overall, the number of establishments in the county increased steadily in the late 1990's but retreated by 2005. An 'establishment' is a physical place of business and does not include persons without a physical business address in the county (e.g. contract employees or employees working remotely for a company not based in Marin). The number of establishments increased from a low of 9,748 in 1996 to a peak of 10,257 in 2001 before declining to 10,023 in 2005. By 2006, total establishments slightly rebounded to 10,076. Establishments grew 5.2% between 1996 and the 2001 peak and experienced a 3.4% net increase from 1996 to 2006.

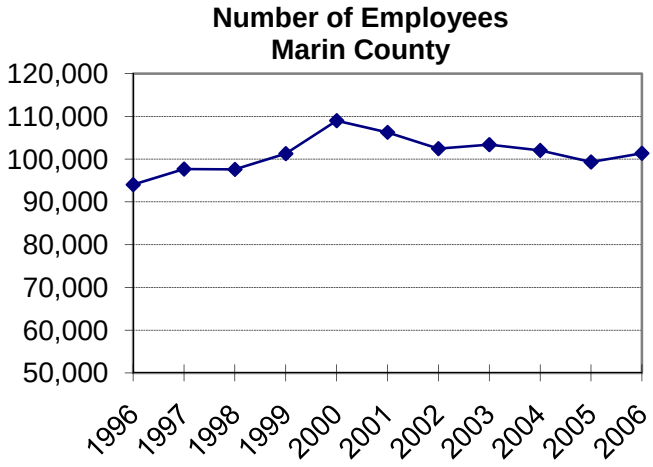


The proportion of business size, when looked at by number of employees, has remained relatively constant. Small businesses compose a majority of all business establishments in Marin. In 2006, 9,049 or 90% of all establishments employed fewer than 20 persons. Businesses employing 20 to 100 comprised 9% of all establishments and only 1.3% of employed more than 100 persons.

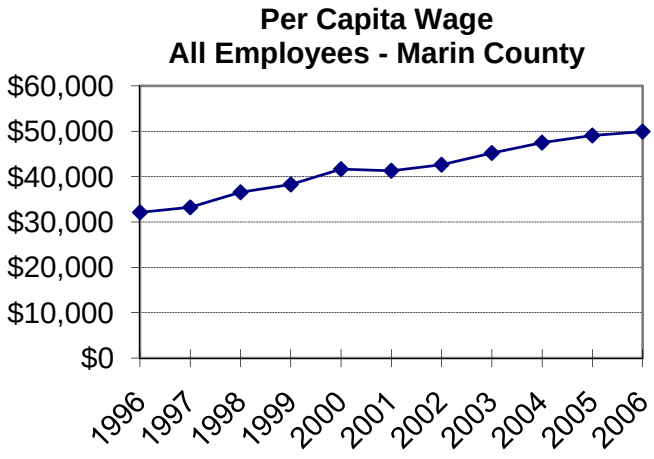


Although there was a slight decrease from 1997 to 1998, employment increased from a low of 94,024 workers in 1996 to a high of 109,012 in 2000, a 16% increase. With the subsequent recession, employment declined to 99,323 by 2005. As of 2006, county employment slightly rebounded to 101,358. Overall, employment grew 7.8% from 1996 to 2006.

Per capita wages (total industry payroll divided by total employees) increased 29.7% between 1996 and 2000 from $32,120 in 1996 to $41,652 in 2000. After a slight dip in 2001 to $41,289, wages again climbed 21% to $49,919 in 2006. Per capita wages experienced a 55.4% net increased from 1996 to 2006, which was well above the annual inflation rate for that period. The individual cluster data demonstrates that wage increases did not occur evenly across all sectors. Professional level positions especially in finance, real estate, and management generally saw significant gains while service sector positions in retail and food services typically experienced smaller wage appreciations both in absolute dollars and percentage.



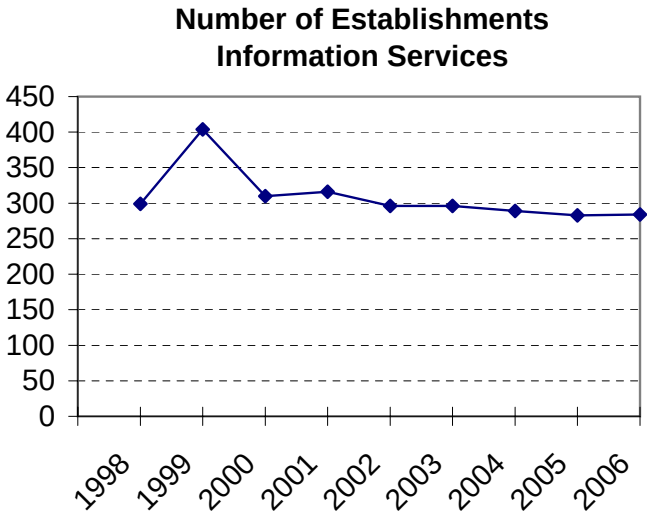
Information on major groups of employers in Marin is provided on the following pages. Data comes from County Business Patterns which is a data service of the US Census Bureau. County Business Patterns figures do not include persons who are self-employed or public employers. Therefore, actual employment figures are higher than are indicated here. While reliable sole proprietor data is not available, public sector employment is discussed separately on page 44. Data provided from County Business Patterns is aggregated by the North American Industrial Classification System (NAICS), a standardized classification system that details a spectrum of commercial enterprises, nonprofit organizations, and public service agencies. NAICS is the successor to the Standard Industrial Classification (SIC) system. NAICS-based data starts in 1998 and is not comparable with pre-1998 SIC-based data. Therefore, data is not provided at the industry cluster level prior to 1998.

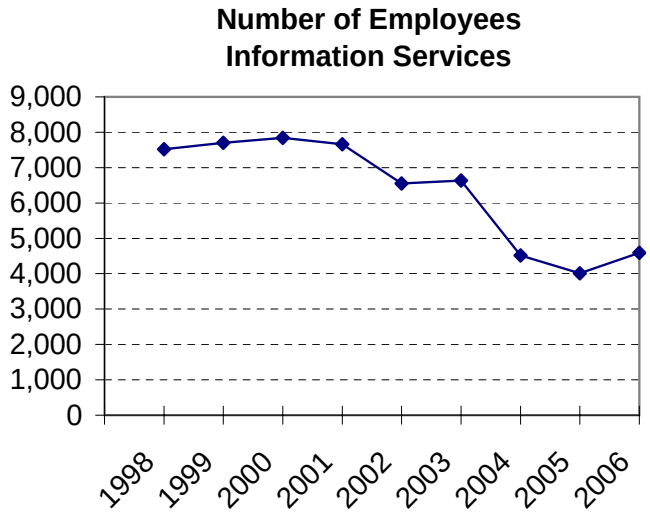


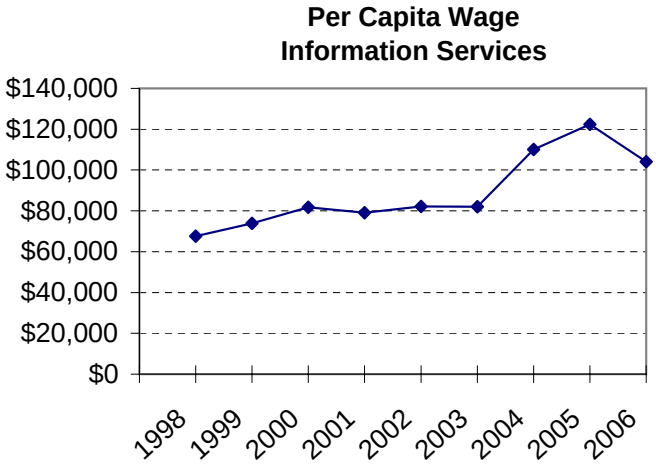
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Information Services

Information Services includes publishing, software, and computer and data processing services. This sector saw significant employee growth through the 1990's increasing from 7,518 employees in 1998 to a high of 7,842 employees in 2000. However, the technology sector collapse resulted in a 41.4% decrease to a low of 4,015 in 2005. As of 2006, this number slightly rebounded to 4,592 employees. Per capita wages increased 65.5% from a low of $67,652 in 1998 to a high of $122,314 in 2005. 73.8% of this growth occurred from 2003 to 2005. By 2006, per capita wages fell 15% to $104,095. Total establishments spiked from 299 in 1998 to 404 in 1999, but fell steeply back to 310 in 2000. By 2006, this number fell to 284.



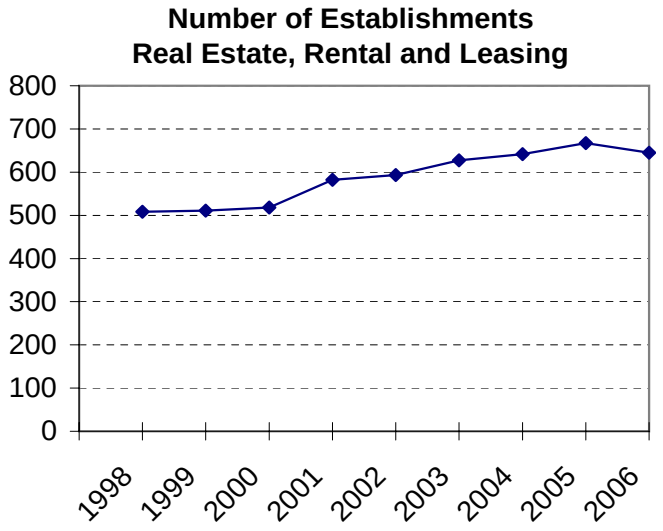


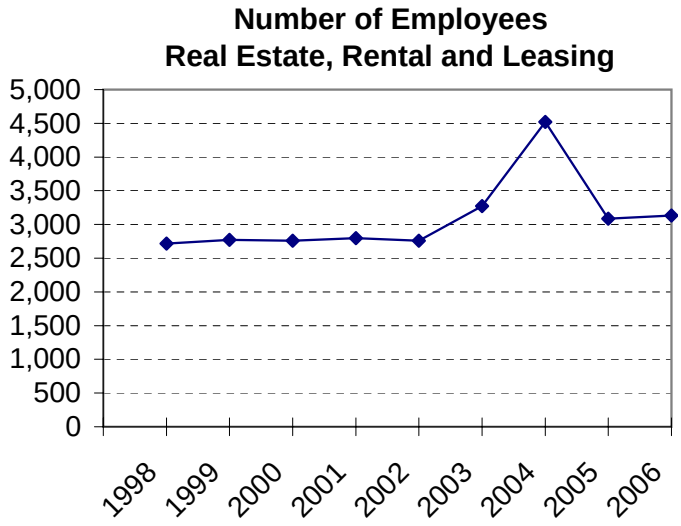


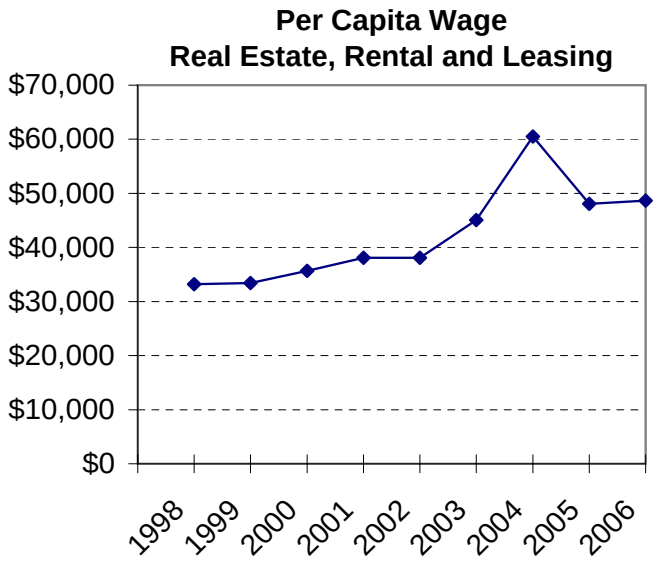
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Real Estate, Rental, and Leasing

Real Estate, Rental, and Leasing includes not only residential and commercial real estate ventures but also leasing of vehicles and equipment. Sustained by strong activity in the housing market, this industry cluster significantly increased across the board from 1998 to 2004, but then decreased in 2006. Employees grew 66.3% from a low of 2,718 in 1998 to a peak of 4,520 in 2004. However, by 2006, this number fell 30.7% to 3,131. Per capita wages in this sector grew 82.2% from a low of $33,198 in 1998 to a high of $60,448 in 2004. By 2006, this number fell 19.6% to $48,640. Lastly, establishments increased 31.3% from 508 in 1998 to a high of 667 in 2005. By 2006, the number of establishments declined to 645.



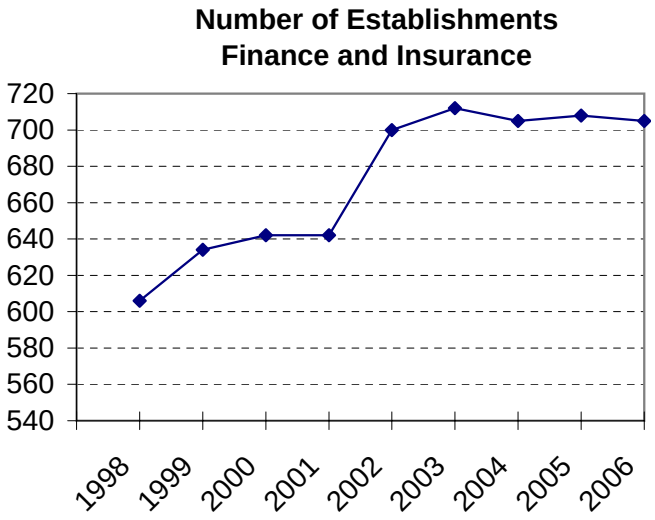


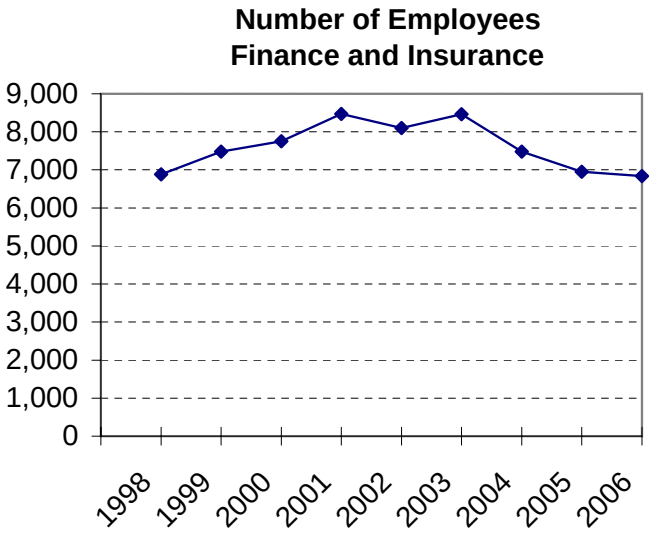


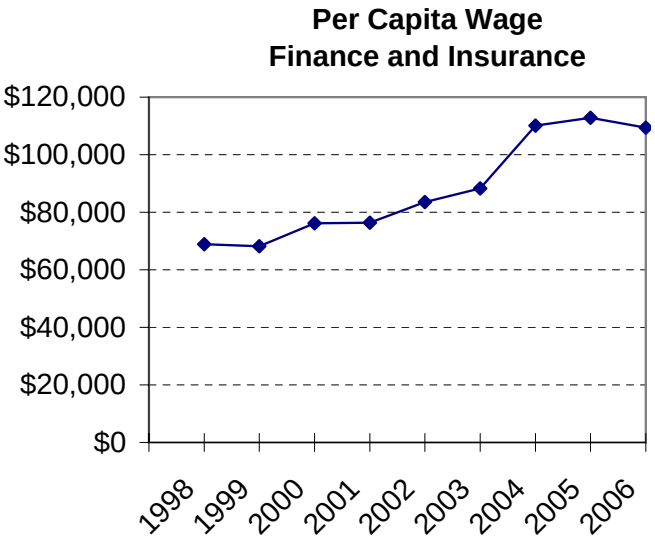
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Finance and Insurance

The Finance and Insurance cluster has shown strong growth. Employment in this cluster increased 23.2% from a low of 6,879 in 1998 to a high of 8,473 in 2001. Although employment decreased to 8,097 in 2002, it rebounded back to 8,465 in 2003. By 2006, this number trended downward 19.3% to 6,834 workers. Per capita wages increased 63.7% from $68,894 in 1998 to a peak of $112,808 in 2005, but then declined to $109,400 by 2006. Total establishments increased every year, from 606 in 1998 to 712 in 2003, a 17.5% increase. However, by 2006, establishments fell to 705.





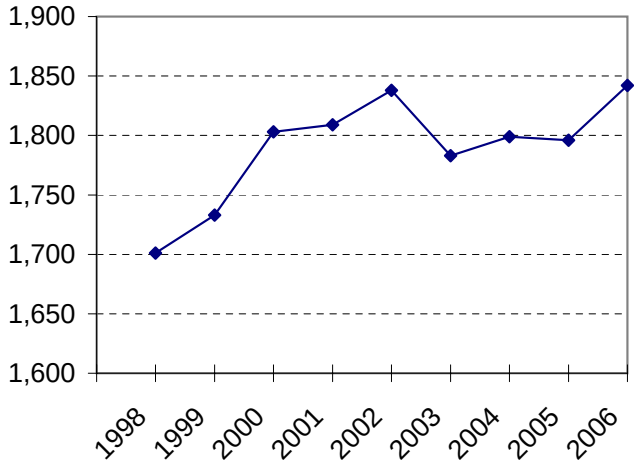


Source: U.S. Census Bureau, County Business Patterns

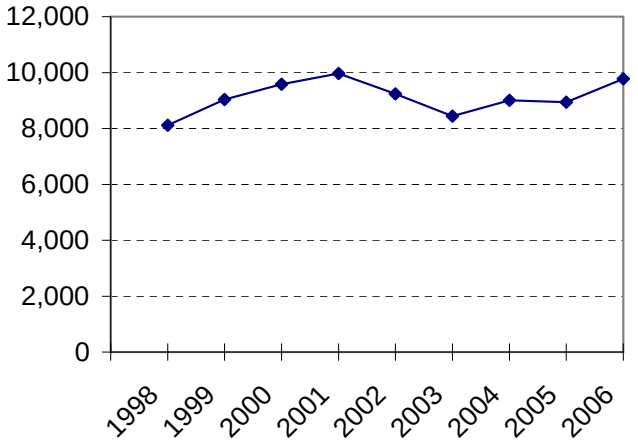
Cluster Focus: Professional, Scientific, and Technical Services

Professional, Scientific, and Technical Services includes legal services, accounting and bookkeeping, architectural and engineering firms, scientific research, and technical consulting. Growth in this cluster has been mixed and has generally paralleled the overall health of the economy. Employment increased 23% from a low of 8,112 in 1998 to peak of 9,966 in 2001, but receded 15.3% to 8,443 by 2003. As of 2006, employment rebounded 15.7% to 9,771. Per capita wages increased 23% from a low of $53,139 in 1998 to $65,334 by 2000. After dipping to $59,170 in 2002, wages steadily increased another 26% to a peak of $74,593 in 2006. Lastly, the number of establishments increased from a low of 1,701 in 1998 to 1,838 in 2002. After decreasing to 1,783 in 2003, total establishment rebounded to a high of 1,842 by 2006.

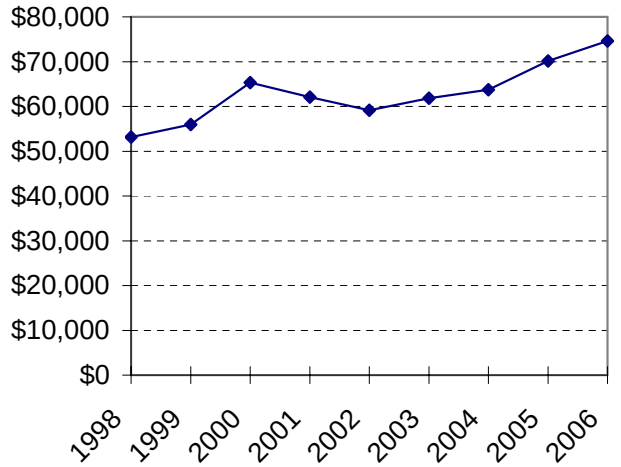
Number of Establishments
Professional, Scientific, and Technical



Number of Employees
Professional, Scientific, and Technical



Per Capita Wage
Professional, Scientific, and Technical

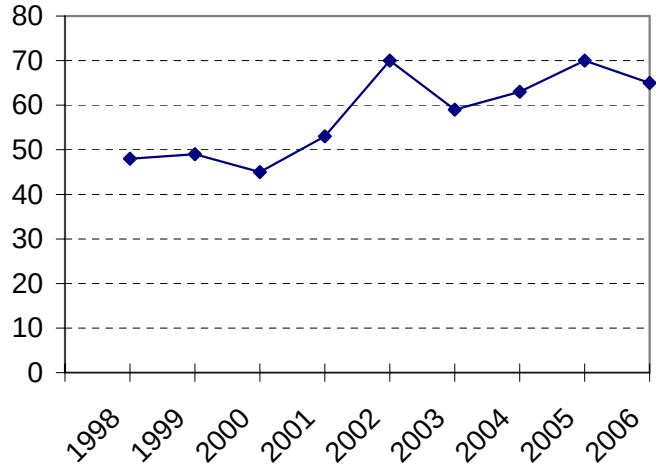


Source: U.S. Census Bureau, County Business Patterns

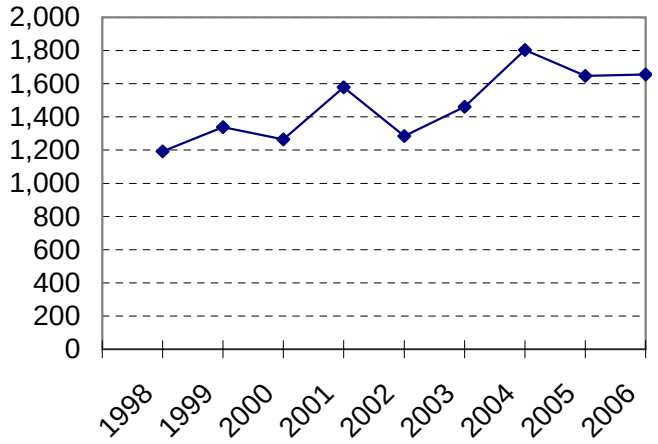
Cluster Focus: Management of Companies and Enterprise

Management of Companies and Enterprises includes parent corporations and holding companies. It is a relatively small cluster in Marin but, as expected, this sector offers a per capita wage nearly twice the county average. Compensation has fluctuated upwards from a low of $60,117 in 1999 to a high of $92,689 in 2006. Employment between 1998 and 2001 jumped 33% from 1,192 to 1,579, but quickly fell to 1,284 in 2002. By 2004, employment jumped again 40.5% to a high of 1,804. However, as of 2006, this number declined to 1,656. Total establishments increased from 48 in 1998 to 70 in 2002. Fluctuating between 59 and 70 from 2002 to 2005, establishments settled at 65 in 2006.

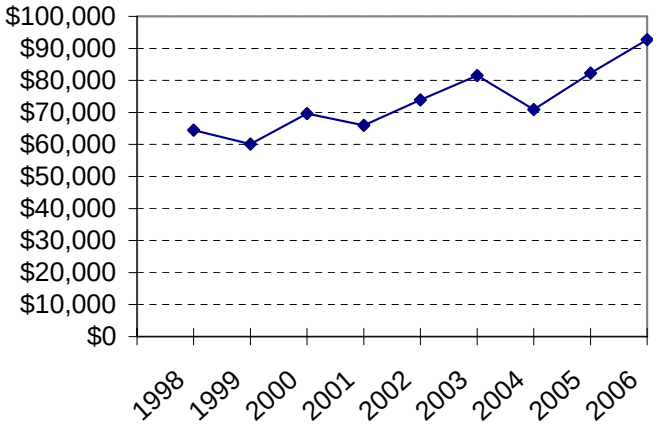
Number of Establishments
Company, Enterprise Management



Number of Employees
Company, Enterprise Management



Per Capita Wage
Company, Enterprise Management

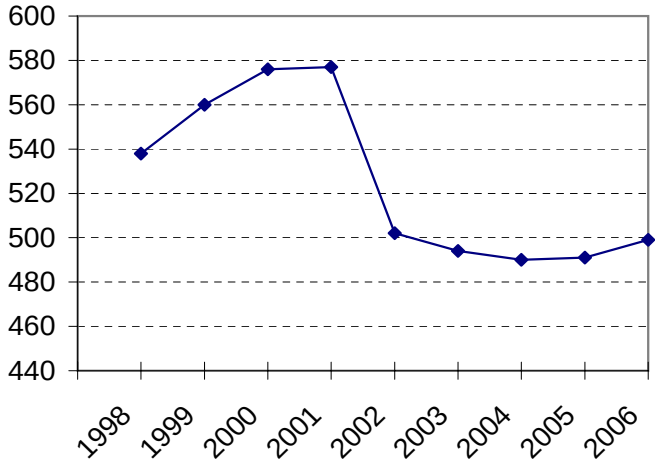


Source: U.S. Census Bureau, County Business Patterns

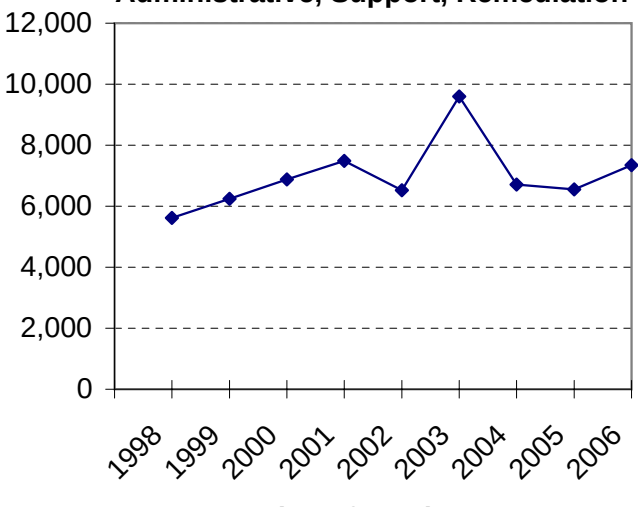
Cluster Focus: Administrative, Support, Waste Management, and Remediation

Administrative, Support, Waste Management, and Remediation Services includes business support, such as temporary personnel agencies, waste hauling, and site remediation services. Employment rose 33.3% from a low of 5,618 in 1998 to 7,489 in 2001. Employment shot up in 2003 to a high of 9,594, a one year increase of 47.1%. After sharply falling 30% in 2004, employment recovered 9.6% to 7,348 in 2006. The per capita wage also increased 23.8% from $27,471 in 1998 to a peak of $34,003 in 2000. Compensation fell 24% to a low of $25,815 by 2003 but later recovered 23% to $31,772 by 2006. Lastly, after rising from 538 in 1998 to a high of 577 in 2001, the number of establishments dropped sharply 13% to 502 in 2002. After further sliding to a low of 490 in 2004, establishments rebounded to 499 by 2006.

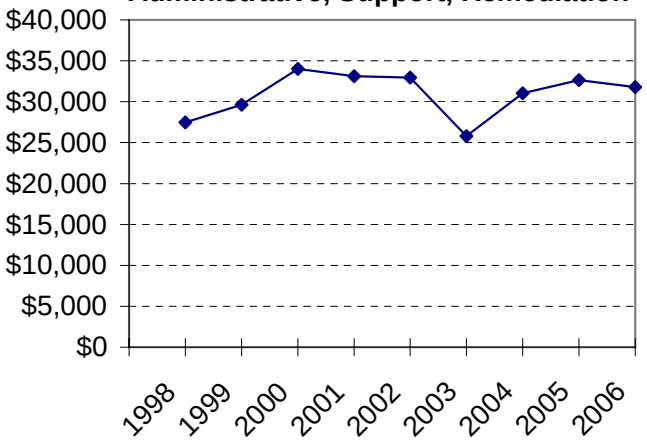
Number of Establishments
Administrative, Support, Remediation



Number of Employees
Administrative, Support, Remediation



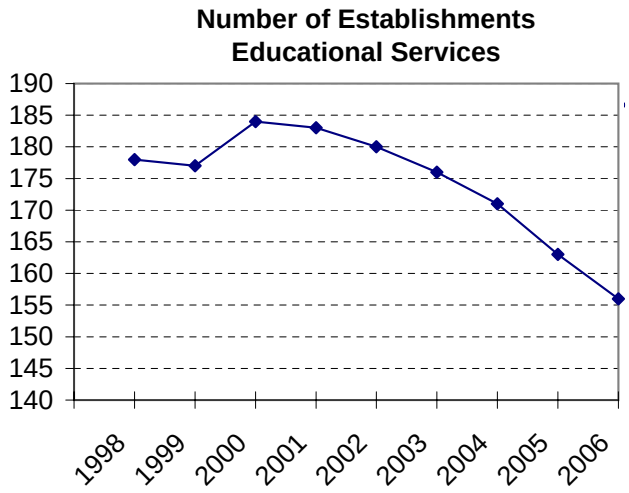
Per Capita Wage
Administrative, Support, Remediation

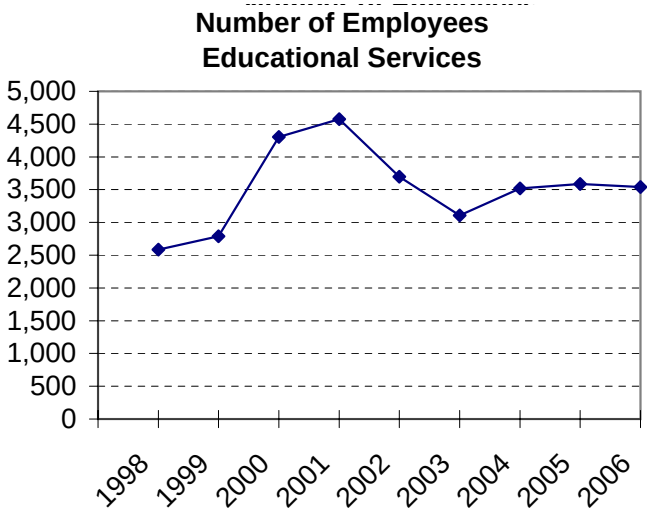


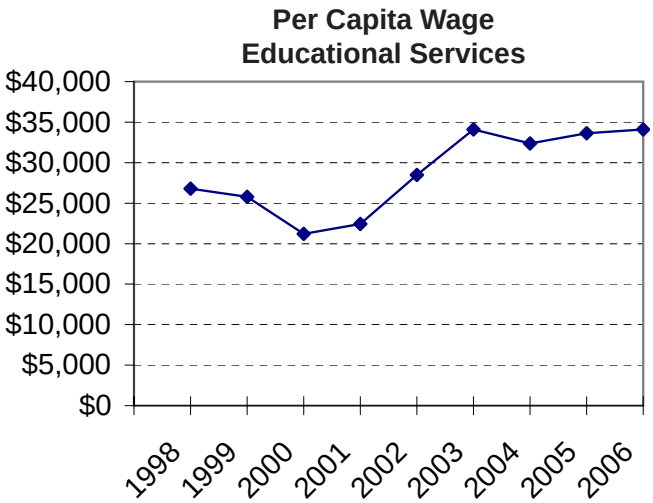
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Educational Services (Private)

Educational Services include private education institutions ranging from pre-schools to colleges. Public education data is discussed under Government Services on page 44. Employment increased 77% from a low of 2,584 in 1998 to a high of 4,574 in 2001. However, by 2003, employment tumbled 32% to 3,109. As of 2006, employment recovered to 3,540. After increasing from 177 in 1999 to a high of 184 in 2000, the number of institutions steadily declined 15.2% to a low of 156 by 2006. Wages decreased from $26,803 in 1998 to a low of $21,189 in 2000, but then rapidly escalated 52.1% to a high of $34,113 between 2001 and 2003. Wages slightly dipped but later recovered to $34,097 by 2006. Per capita earnings of this group can be somewhat deceiving because college level educators typically are better compensated than pre-school and private school instructors.





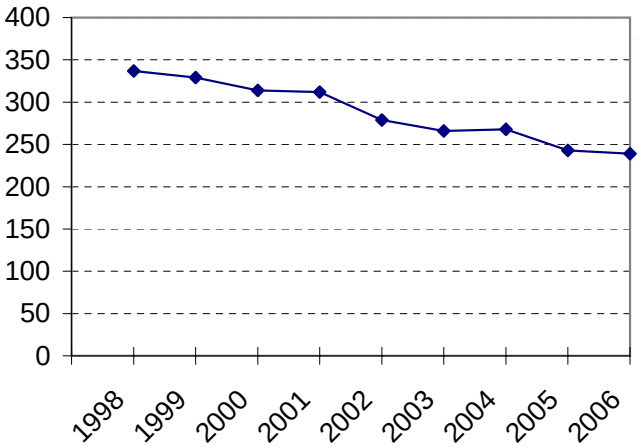


Source: U.S. Census Bureau, County Business Patterns

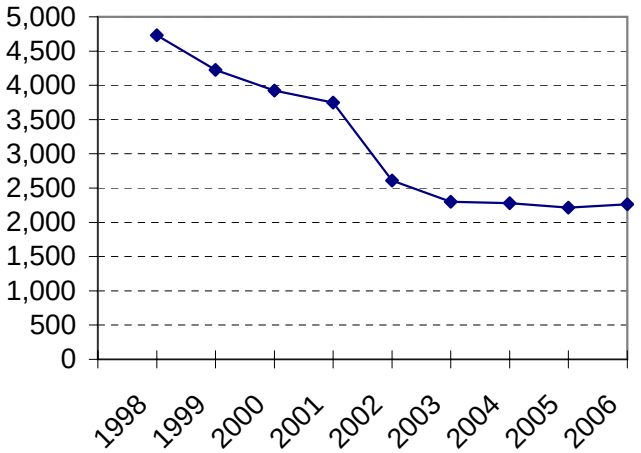
Cluster Focus: Manufacturing

Between 1998 and 2006, the number of manufacturing establishments steadily declined 29% from 337 to 239. Similarly, employment decreased 51% from 4,731 to 2,263 during this period. In addition per capita wages fell from $38,425 in 1998 to a low of $37,498 in 2000. After spiking 13.4% to a high of $42,514 by 2002, wages fell to $40,150 by 2005 before recovering to $41,958 in 2006. Until 2001, manufacturing had a higher percentage of establishments with 20 or more employees than other clusters in Marin.

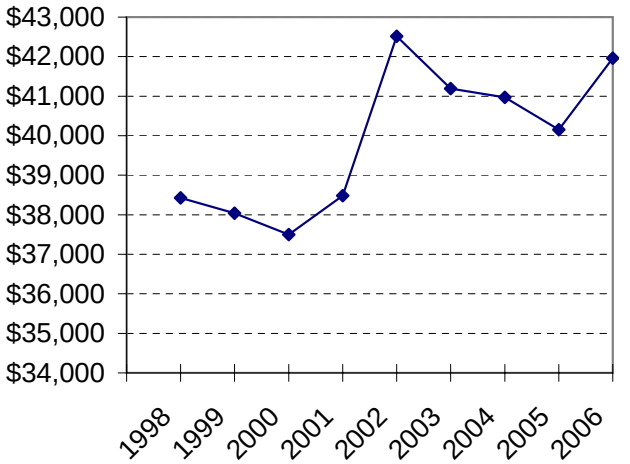
Number of Establishments Manufacturing



Number of Employees Manufacturing



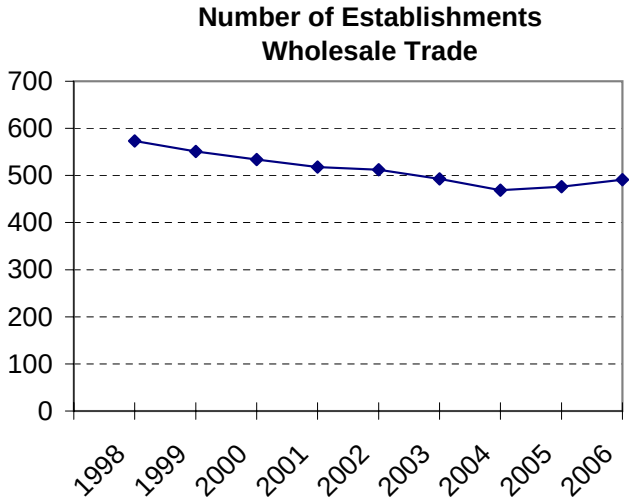
Per Capita Wage Manufacturing

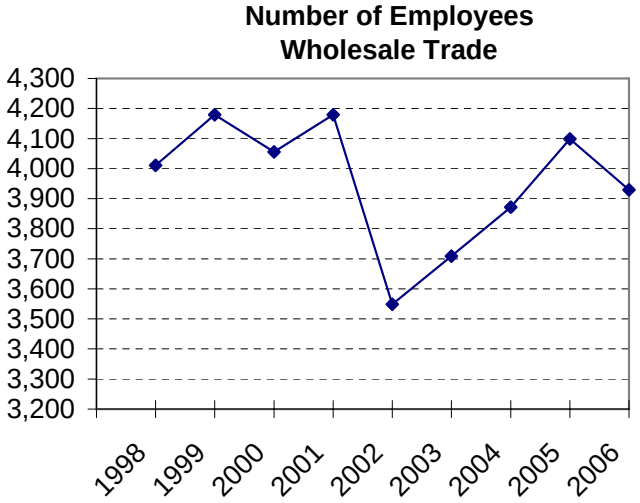


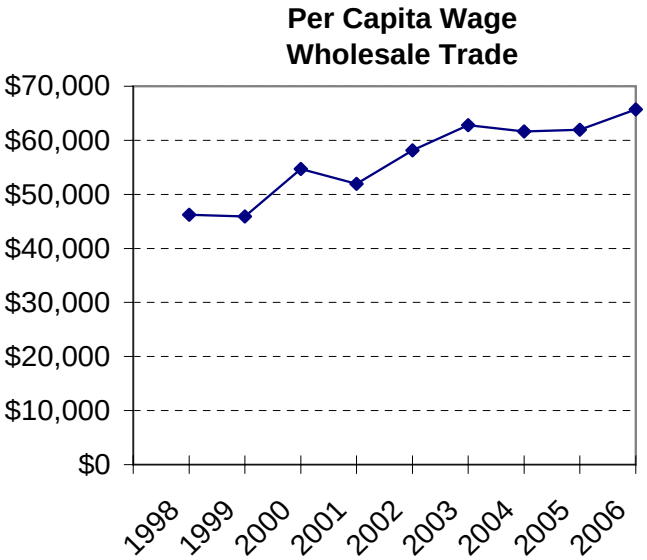
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Wholesale Trade

From 1998 to 2004, Wholesale Trade establishments dropped 18.2% from a high of 573 to a low of 469. The number of establishments slightly rebounded to 491 by 2006. Employment fluctuated between 4,011 in 1998 and a high of 4,179 in 2001. Employment steeply declined 15% to a low of 3,549 in 2002. By 2005, employment recovered 15.5% to 4,099 before falling to 3,929 in 2006. The per capita wage also fluctuated over the period but has shown a significant net increase over time. Wages fluctuated upwards 36% from $46,209 in 1998 to $62,776 in 2003. After slightly dipping in 2004, wages increased to a high of $65,687 in 2006.



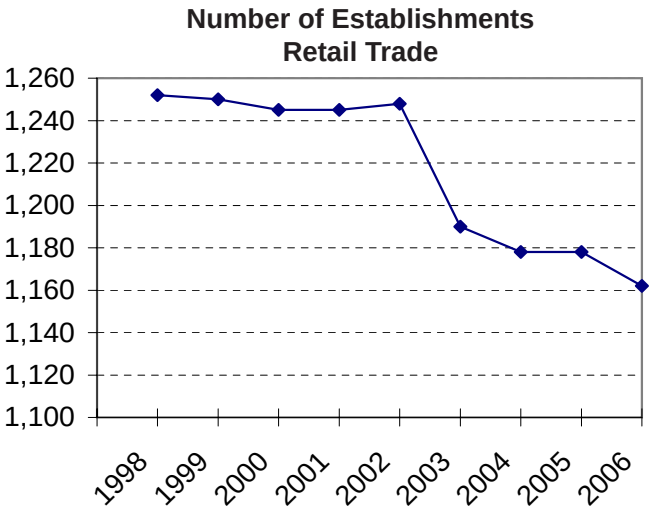


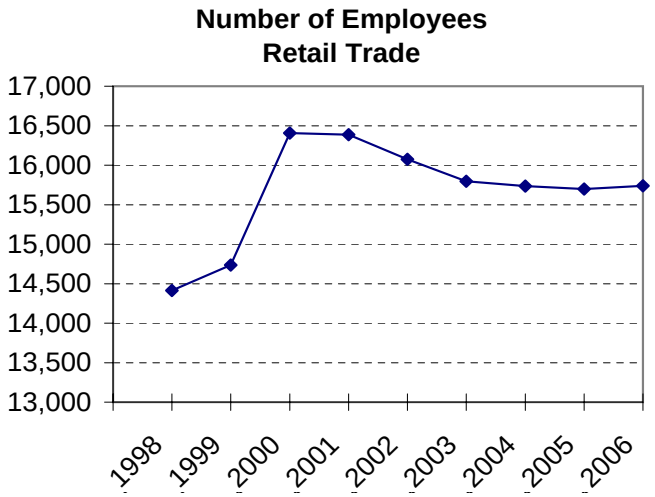


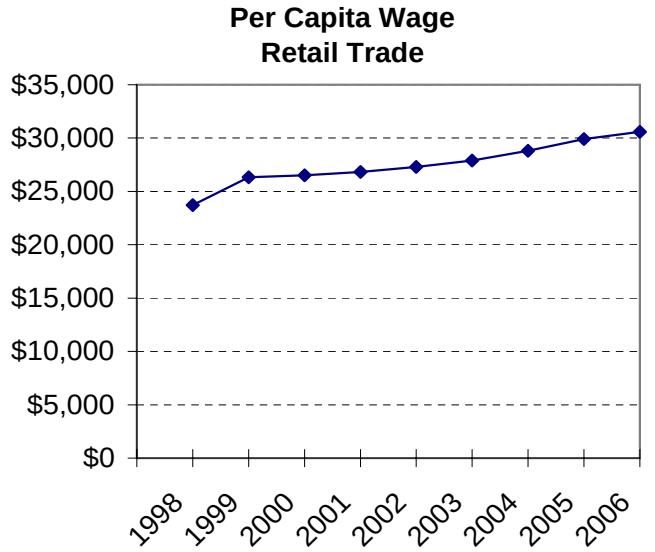
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Retail Trade

Retail Trade provides the greatest number of jobs, but also provides lower wages than other industries. The industry has remained relatively flat over the years. From 1998 to 2002, establishments slightly dipped from 1,252 to 1,248. The number of establishments later fell significantly to 1,162 by 2006 (note: 67.4 percent of this decrease occurred in 2003). The number of employees steeply grew 13.8% from a low of 14,412 in 1998 to a high of 16,407 in 2000. By 2005, employment slowly decreased to 15,699 before slightly recovering to 15,738 in 2006. A common complaint during the late 1990's economic boom was that it was extremely difficult, as a business owner, to hire retail staff and, as a customer, to get help. However, since then, the number of employees per establishment increased from 11.5 in 1998 to 13.5 by 2006. The per capita wage steadily increased 29% from $23,713 in 1998 to $30,590 in 2006. However, this increase averaged just 3.3% per year, well below the average inflation rate for the period.



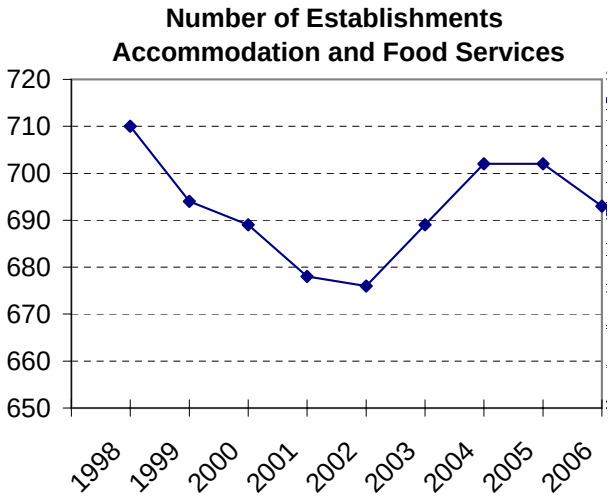


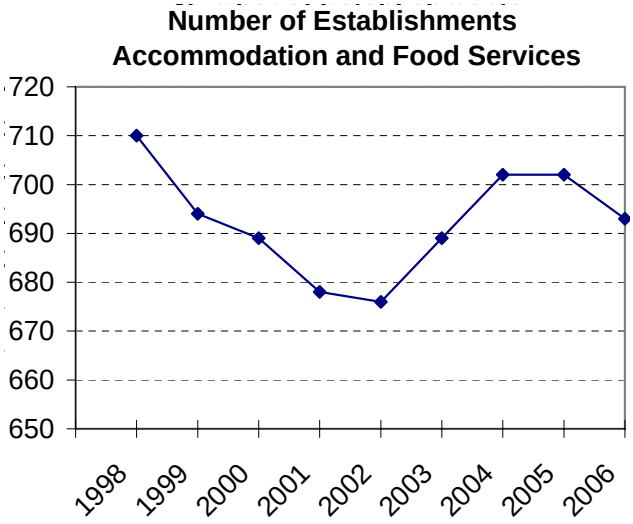


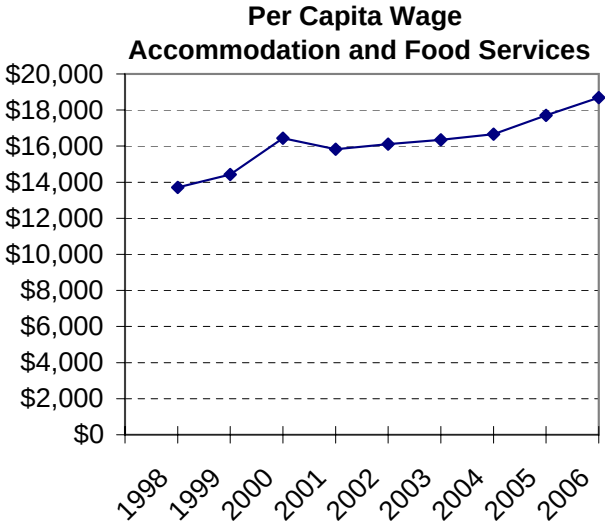
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Accomodation and Food Services

Also a large employer in the county, the Accommodations and Food Service cluster offers the lowest per capita wage of all clusters. The wage for this sector has consistently remained around 40% of the total county per capita wage. Declining only in 2001, wages steadily increased 36.3% over the period from $13,707 in 1998 up to a high of $18,689 in 2006. The number of establishments decreased 4.8% from 710 in 1998 to a low of 676 in 2002 before rebounding 3.8% to 702 in 2004 and 2005. By 2006, establishments fell to 693. Employment significantly fluctuated from 10,140 workers in 1998 to 10,544 in 2002. After falling to a low of 10,103 in 2003, the number of employees jumped to a high of 10,623 in 2004. As of 2006, employees slightly fell to 10,551 employees. This cluster was negligibly impacted by the drop in tourism largely caused by the September 11, 2001 terrorist attacks on the World Trade Center because Marin typically does not attract the same number of out-of-state and international visitors as San Francisco. Since residents typically patronize local hotels and restaurants after a crisis like this, Marin's local establishments most likely received extra local patronage.



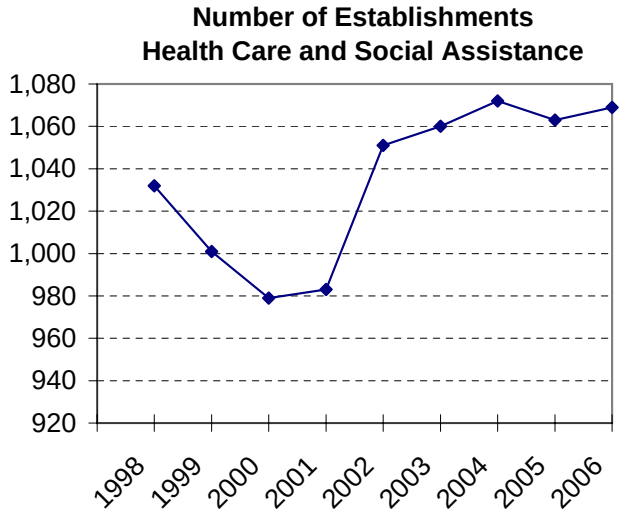


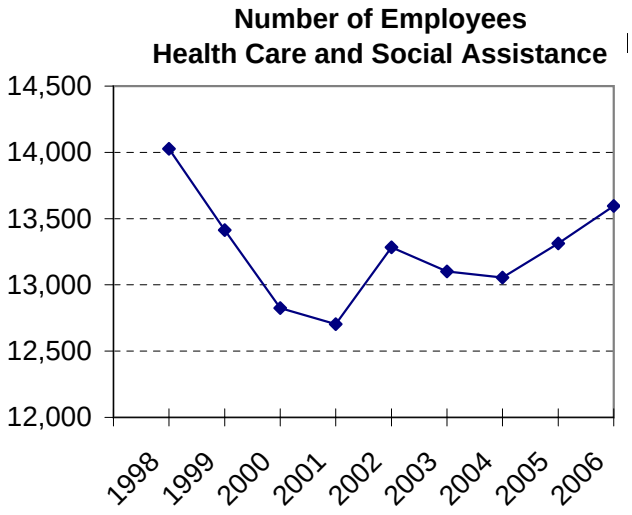


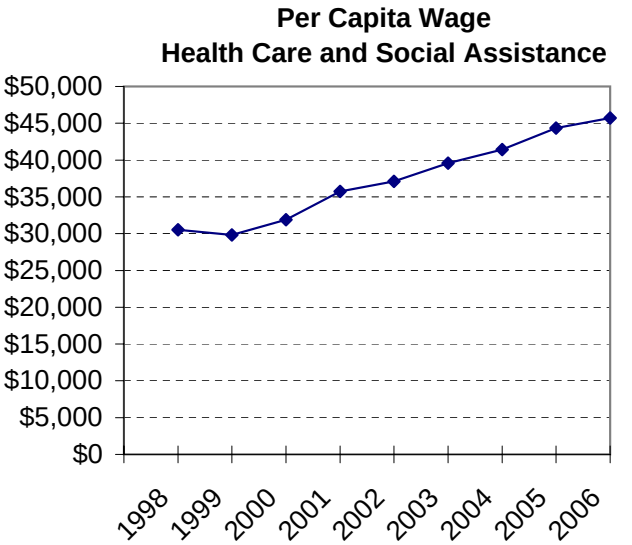
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Health Care and Social Assistance

Health Care and Social Assistance such as the entire medical field including nursing homes, community care facilities, family services, and child care. This is the second largest employment sector in the county with over 13.7% of total jobs. However, between 1998 and 2001, employment decreased 9.4% from a high of 14,026 to a low of 12,704 before rebounding to 13,284 in 2002. Slightly dipping in 2004, employment rose to 13,595 by 2006. At the same time, the number of establishments decreased from 1,032 to a low of 979 in 2000. By 2004, establishments recovered 9.5% to a high of 1,072 before dipping to 1,069 by 2006. Lastly, after declining to a low of $29,833 in 1999, per capita wages steadily climbed 53.3% to $45,727 by 2006.



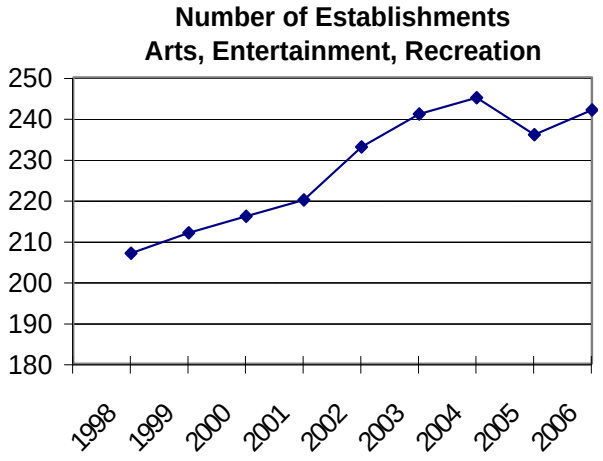


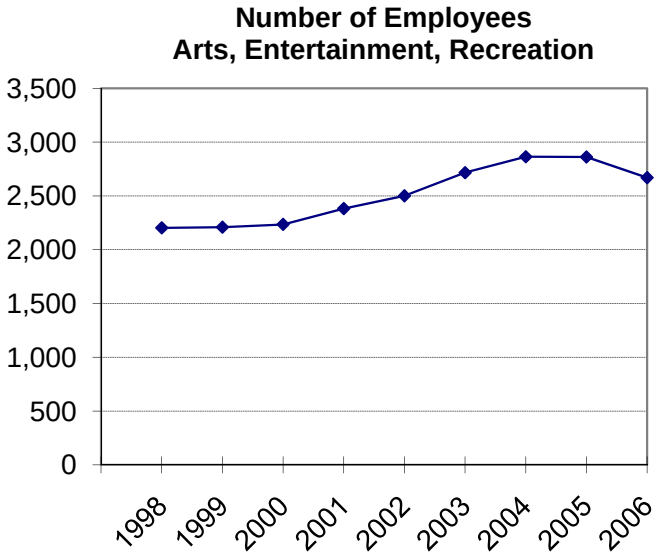


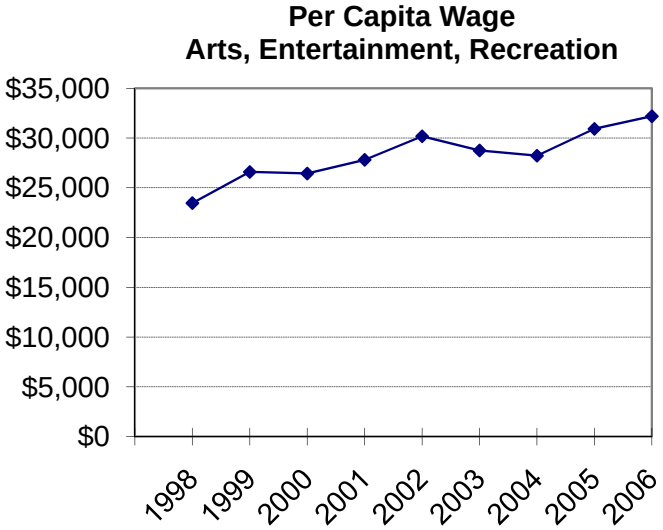
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Arts, Entertainment, and Recreation

The Arts, Entertainment, and Recreation Services cluster has experienced across-the-board growth since 1998. Employment has grown 30%, from a low of 2,203 in 1998 to a high of 2,864 in 2004. However, by 2006 employment dipped to 2,670. The number of establishments increased 14% from 207 in 1998 to a high of 245 in 2004. After falling to 236 in 2005, establishments rebounded to 242 in 2006. Except in 2003 and 2004, wages in this sector steadily increased 37.2% from $23,459 in 1998 to a high of $32,183 in 2006. As with Retail Trade, the advances in wages are tempered by an overall low per capita wage among other industries, although wages in this cluster have adequately risen with inflation.



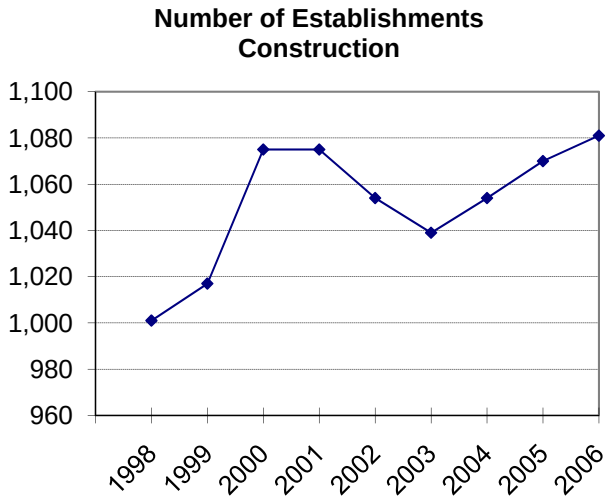


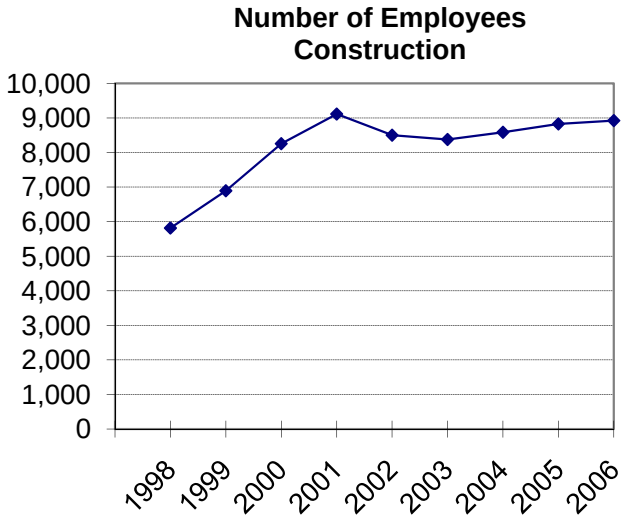


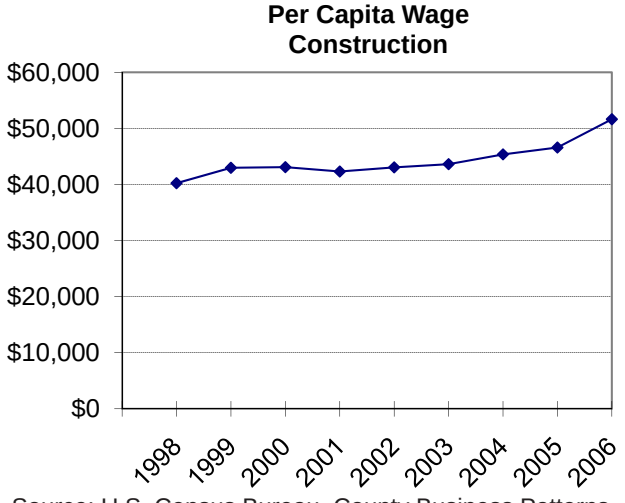
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Construction

The number of construction jobs and establishments has closely followed the health of the overall economy. Employment grew 56.7% from 5,815 in 1998 to a high of 9,110 in 2001 before decreasing to 8,375 in 2003. By 2006, employment rebounded to 8,920. Construction firms increased 7.4% from 1,001 in 1998 to 1,075 in 2000 and 2001 and then declined to 1,039 in 2003. Decreasing only in 2001, wages steadily increased 28.3% from $40,237 in 1998 to a high of $51,633 in 2006.



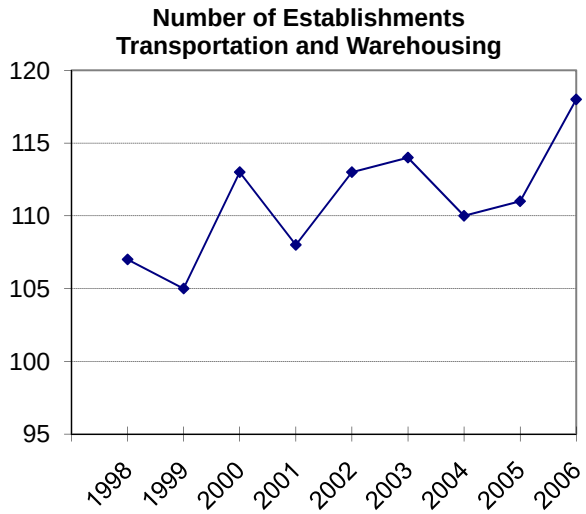


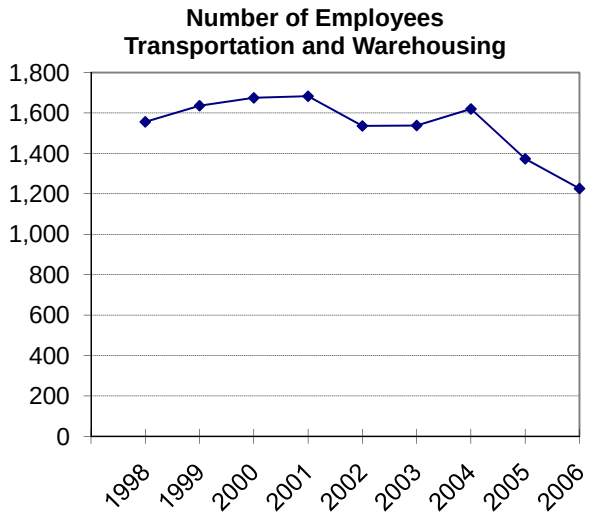


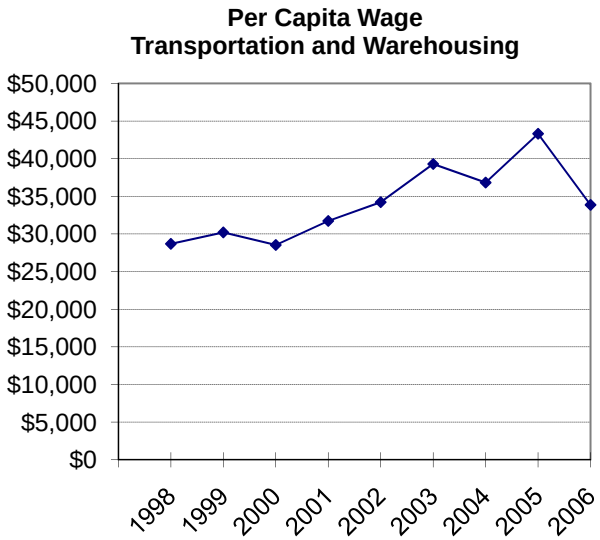
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Transportation and Warehousing

While jobs in the Transportation and Warehousing cluster have decreased, the number of establishments have increased over the study period. Employment increased from 1,556 in 1998 to a high of 1,683 in 2001 before falling back to 1,536 in 2002. After rebounding to 1,620 in 2004, employment significantly decreased 24.3% to a low of 1,226 in 2006. The number of establishments fluctuated upwards from a low of 105 in 1999 to 114 in 2003. After dipping to 110 in 2004, the number of establishments jumped to a high of 118 in 2006. Lastly, while per capita wages fell in 2000 and 2004, overall the wages steadily increased 51% from $28,689 in 1998 to a high of $43,310 in 2005. However, wages then tumbled considerably 21.8% to $33,864 in 2006.



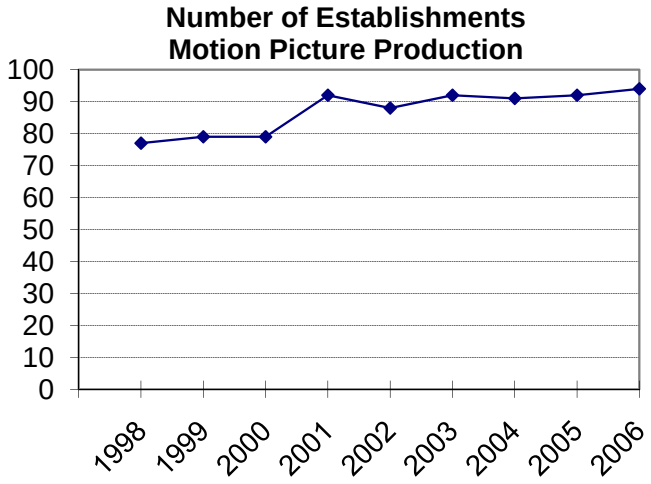


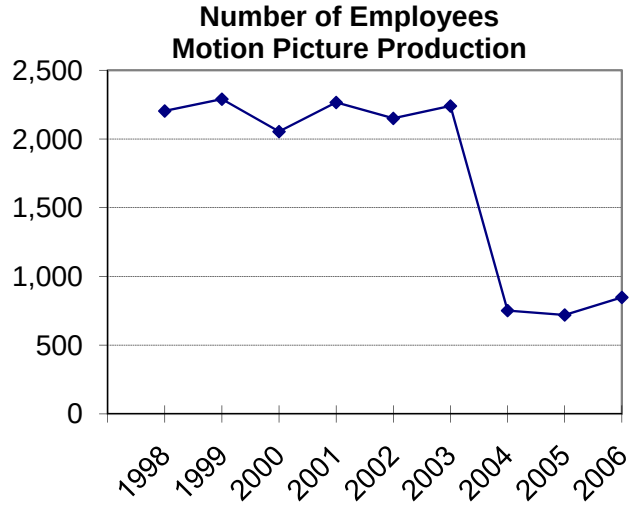


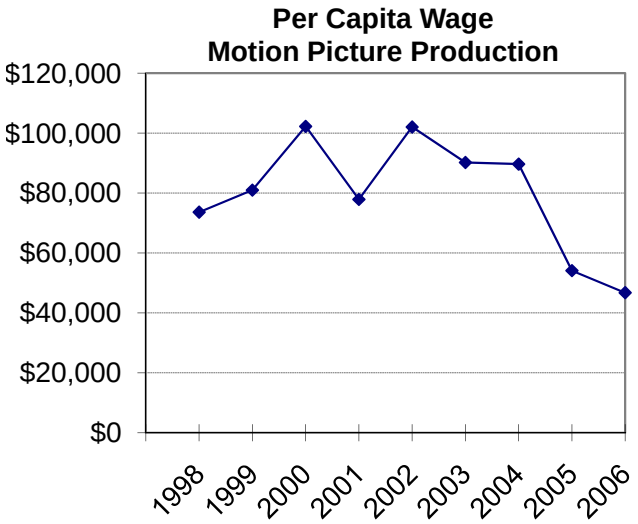
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Motion Picture Production

Motion Picture Production is a subset of the Information Services category. Starting with 2,204 employees in 1998, between 1999 and 2003, employment fluctuated from 2,054 to a high of 2,240 in 2003. By 2005, workers plummeted 68% to a low of 720 before rebounding to 848 in 2006. Motion picture establishments steadily grew 22% from 77 in 1998 to 94 by 2006 and significantly decreased only in 2002. The per capita wage has varied considerably. Wages increased 37% from $73,613 in 1998 to a high of $102,236 in 2000. After falling to $77,860 in 2001, wages increased back to $102,033 in 2002 then steadily fell 52.4% to a low of $46,722 by 2006.





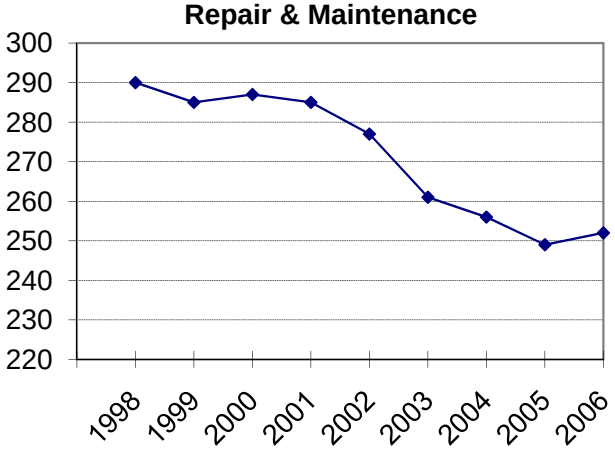


Source: U.S. Census Bureau, County Business Patterns

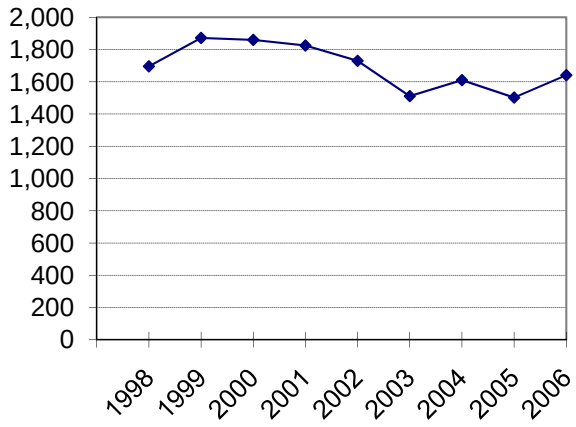
Cluster Focus: Repair and Maintenance

Repair and Maintenance Services includes repair and maintenance of vehicles as well as electronic and precision equipment, commercial equipment, and personal and household goods. Employment grew from 1,696 in 1998 to a high of 1,872 in 1999. After sliding to a low of 1,502 in 2005, employment rebounded to 1,641 in 2006. The number of establishments have steadily decreased 14% from 290 in 1998 to a low of 249 in 2005 before rebounding to 252 in 2006. Lastly, except for decreases in 1999 and 2004, wages have consistently increased from a low of $31,821 in 1999 to a high of $44,561 in 2005. The per capita wage decreased to $41,976 in 2006.

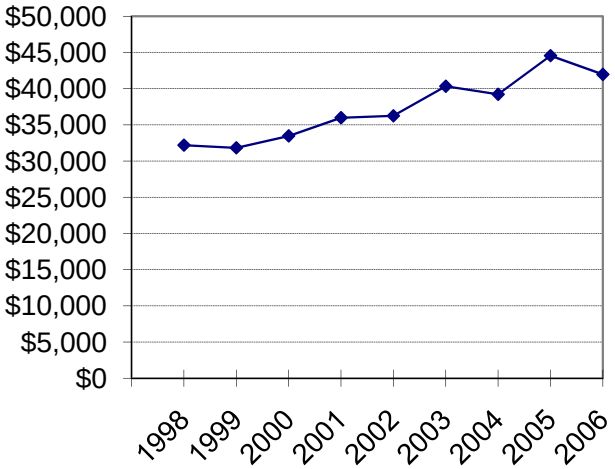
Number of Establishments
Repair & Maintenance



Number of Employees
Repair & Maintenance



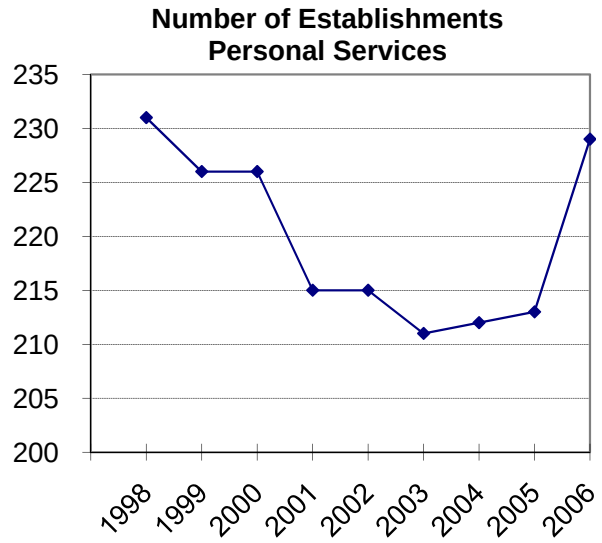
Per Capita Wage
Repair & Maintenance

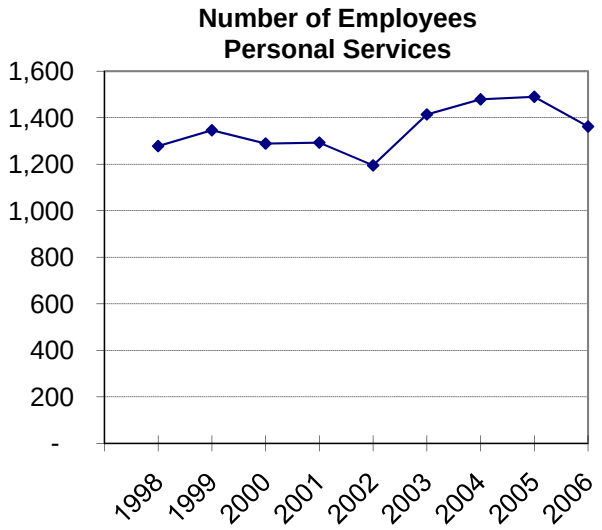


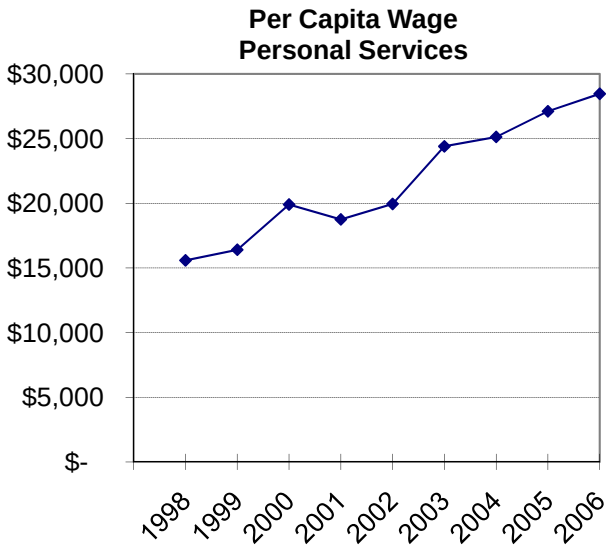
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Personal and Laundry Services

The Personal and Laundry Services cluster saw a reduction then sharp recovery in the number of establishments, as well as an overall increase in employment. Establishments decreased 8.7% from a high of 231 in 1998 to a low of 211 in 2003. By 2006, establishments significantly recovered 8.5% to 229. After decreasing from 1,278 in 1998 to a low of 1,195 in 2002, employment grew to a high of 1,490 by 2005. As of 2006, employment fell to 1,362. Per capita wages are comparatively low in this cluster. However, they steadily (decreasing only in 2001) increased 82.6% from $15,583 in 1998 to a high of $28,461 in 2006, one of the greatest percentage increases of any cluster.



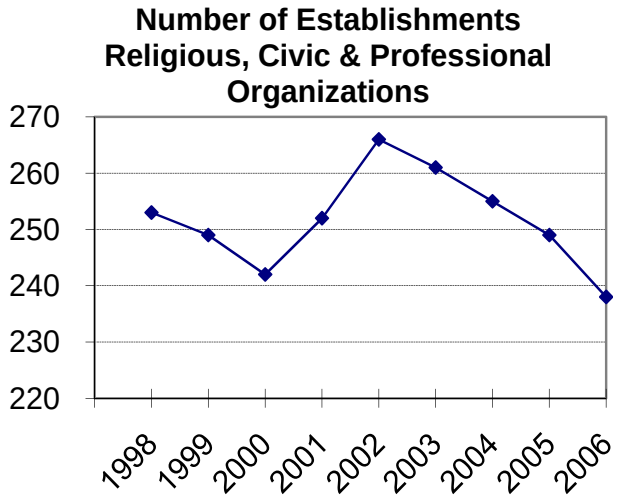


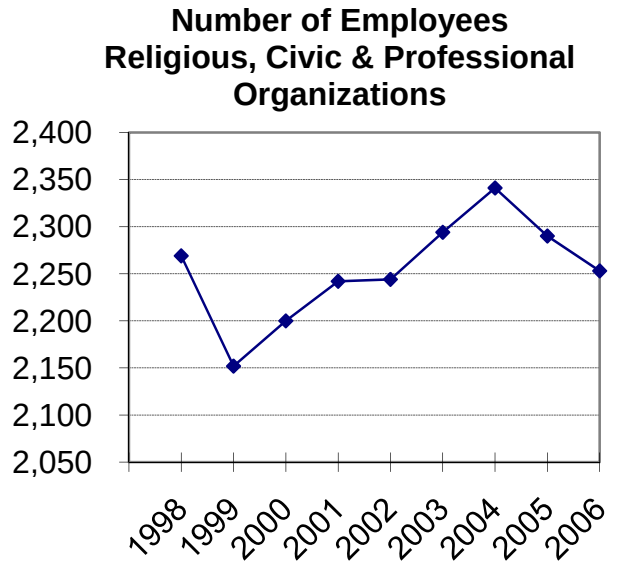


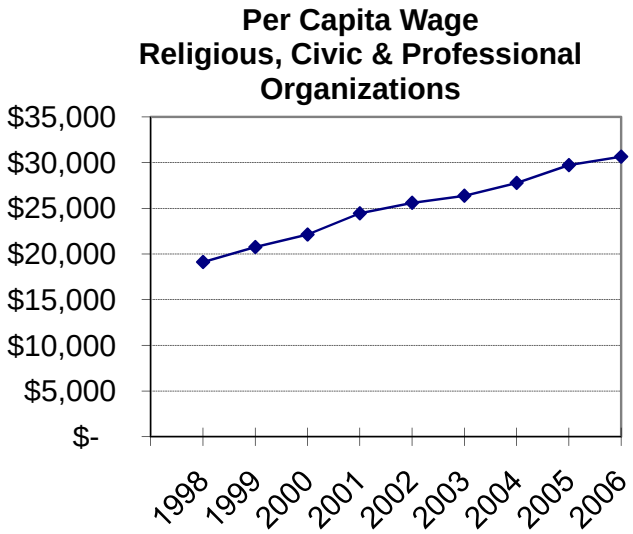
Source: U.S. Census Bureau, County Business Patterns

Cluster Focus: Religous, Civic, and Professional Organizations

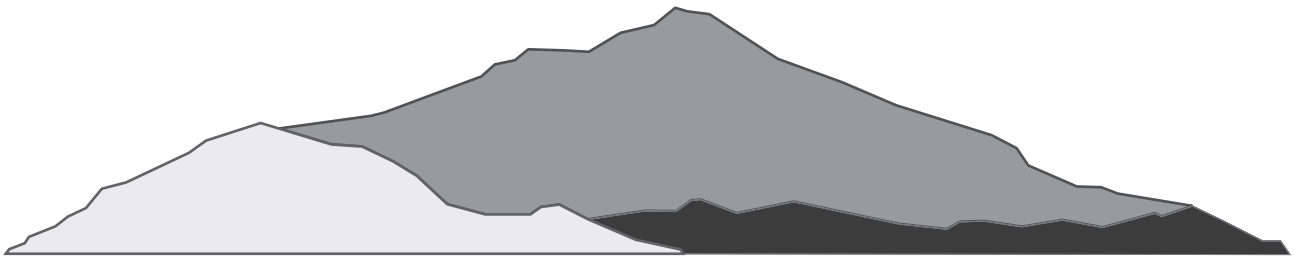
The number of establishments and employees varied for Religious, Grant-making, Civic and Professional Organizations while the mean wage has gradually increased. Establishments dropped from 253 in 1998 to a low of 242 in 2000 before increasing to a high of 266 by 2002. By 2006, establishments dropped 10.5% to a low of 238. The number of employees dropped from 2,269 in 1998 to a low of 2,152 in 1999, but later steadily increased to a high of 2,341 in 2004. By 2006, establishments fell to 2,253. Per capita wages steadily increased 60.4% from $19,120 in 1998 to a high of $30,660 by 2006. As with Personal and Laundry Services, wages are still well below the county per capita wage of $86,062 (U.S. Department of Commerce), but have improved dramatically since 1998.







Source: U.S. Census Bureau, County Business Patterns



Appendix

Sources

The data in this report was obatined from the following sources. Address, phone number, and internet address information is provided as available.

Association of Bay Area Governments
101 8th Street
Oakland, CA 94607
510-464-7900
www.abag.ca.gov

Bureau of the Census
Seattle Regional Office
Ralph J. Lee
Regional Director
601 Union Street
Suite 3800
Seattle, WA 98101-1074
301-763-2495 (Public Information Office)
1-866-758-1060 (National Elections Information)
www.census.gov

California Air Resources Board
1001 I St.
Box 2815
Sacramento, CA 95812
800-363-2990
www.arb.ca.gov/emissiondata

California Department of Education
1430 N Street
Sacramento, CA 95814-5901
916-319-0800
www.cde.ca.gov

California Department of Finance
915 L St.
Sacramento, CA 95814
916-445-3878
www.dof.ca.gov/

California Department of Justice
Box 944255
Sacramento, CA 94244-2550
916-322-3360
caag.state.ca.us

California Department of Motor Vehicles
75 Tamal Vista Blvd.
Corte Madera, CA 94925
(800) 777-0133
www.dmv.ca.gov

California Department of Transportation
1120 N St.
Box 942873
Sacramento, CA 94273-0001
www.dot.ca.gov

California Employment Development Department
Labor Market Information Division
P.O. Box 826880, MIC 57
Rancho Cordova, CA 94280-0001
916-262-2162
www.labormarketinfo.edd.ca.gov

California Energy Commission
Media and Public Communications Office
1516 Ninth Street, MS-29
Sacramento, CA 95814-5512
916-654-4987
www.energy.ca.gov

California Secretary of State
1500 11th Street
Sacramento, California 95814
916-653-6814
http://www.sos.ca.gov

California State Board of Equalization
450 N Street
Sacramento, CA 95184
PO Box 942879
Sacramento, CA 94279-0090
800-400-7115
www.boe.ca.gov

Energy Information Administration/EI 30
U.S. Dept. of Energy
1000 Independence Avenue, SW
Washington, D.C. 20585
202-586-8800
http://eia.doc.gov

Keegan and Coppin Real Estate
1355 North Dutton Avenue
Santa Rosa, CA 95401
707-528-1400
www.keegancoppin.com

Marin County Assessor
3501 Civic Center Dr., Room 225
San Rafael, CA 94903
415-499-6154
www.co.marin.ca.us

Marin County Community Development Agency
3501 Civic Center Dr., Room 308
San Rafael, CA 94903
415-499-6269
www.co.marin.ca.us

Marin County Department of Agricultural Weights and Measures
1682 Novato Blvd. Suite 150-A
Novato, CA 94947
415-499-6700
www.co.marin.ca.us

Marin County Department of Public Works
3501 Civic Center Dr., Room 304
San Rafael, CA 94903
415-499-6456
General Information
415-499-6647
Division of Waste Management
www.co.marin.ca.us

Marin County Registrar of Voters
3501 Civic Center Drive, Room 121
San Rafael, CA 94903
415-499-6546
www.co.marin.ca.us

Marin Housing Authority
4020 Civic Center Dr.
San Rafael, CA 94903
415-491-2525
info@marinhousing.org

Marin Municipal Water District
200 Nellen Ave.
Corte Madera, CA 94925
415-945-1455
www.marinwater.org
Michael J. Burke
Frank Howard Allen Realtor
Provider of Realfacts Source
511 Sir Francis Drake Blvd.
Greenbrae, CA 94904
415-925-3241
mburke@fhallen.com

Metropolitan Transportation Commission
101 8th St.
Oakland, CA 94607
510-464-5757, Public Information Office
www.mtc.ca.gov

North Marin Water District
999 Rush Creek Pl.
Novato, CA 94945
415-897-4133
www.nmwd.com

Orion Partners
899 Northgate Dr., Suite 500
San Rafael, CA 94903
415-472-8700

U.S. Department of Commerce
Bureau of Economic Analysis
1441 L Street NW
Washington, DC 20230
202-606-9900 (Public Information Office)
202-606-5360 (Regional Economic Info. System)
www.bea.doc.gov

U.S. Bureau of Labor Statistics
San Francisco Regional Office
90 7th Street, Suite 14-100
San Francisco, CA 94103
415-625-2270
www.bls.gov

Data Tables

The data contained in the following tables is the basis for each of the components of the report. The tables follow the same sequence as the report. Page numbers are for reference to the relvant page in the report.

Table 1 - Marin Continues to Grow, but Slowly (Page 1)

	1990	1995	2000	2005	2010	2015	2020	2025	2030	2035
Marin County	230,096	238,500	247,289	252,600	256,500	260,300	264,000	267,300	270,900	274,300
Bay Area	6,020,147	6,394,300	6,783,762	7,096,500	7,341,700	7,677,500	8,018,000	8,364,900	8,719,300	9,073,700
Marin Population as a percentage of the Bay Area	3.82%	3.73%	3.65%	3.56%	3.49%	3.39%	3.29%	3.20%	3.11%	3.02%

Source: Association of Bay Area Governments, Projections 2002, 2009

Table 2 - Marin Getting Older Overall, Senior and Child Population Increasing (Page 2)

	1990		2000		2008	
Age Cluster	Number	Percent	Number	Percent	Number	Percent
Children (0-17)	43,936	19.1%	50,185	20.3%	50,332	19.9%
Young Adult (18-34)	56,888	24.7%	45,630	18.5%	42,523	16.8%
Adult (35-64)	101,103	43.9%	118,042	47.7%	120,987	47.9%
Senior Citizens (65+)	28,169	12.2%	33,432	13.5%	38,571	15.3%
Total	230,096	100.0%	247,289	100.0%	252,413	100.0%

Source: U.S. Census Bureau (1990, 2000); Claritas (2007)

Table 3 - Racial Diversity Lacking but Increasing as Marin Grows (Page 3)

	1980		1990		2000		2007	
White	206,452	92.8%	204,128	88.7%	207,800	84.0%	202,905	81.8%
Asian or Pacific Islander	6,565	3.0%	9,442	4.1%	11,591	4.7%	14,596	5.9%
African-American	5,626	2.5%	8,172	3.6%	7,142	2.9%	7,865	3.2%
Other (includes Amer. Indian)	3,830	1.7%	8,354	3.6%	12,177	4.9%	16,266	6.6%
Multi-Racial*	-	-	-	-	8,579	3.5%	6,464	2.6%
Total	222,473	100.0%	230,096	100.0%	247,289	100.0%	248,096	100.0%
Hispanic Origin**	9,283	4.2%	17,930	7.8%	27,351	11.1%	33,956	13.7%

Source: U.S. Census Bureau

* Multi-Racial was not a seperate category in 1980 and 1990

** Persons of Hispanic origin can be of any race

Table 4 - Marin Residents Becoming More Educated (Page 4)

	1980		1990		2000		2007	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less Than 9th Grade	6,412	4.3%	6,586	3.5%	6,455	3.5%	8,136	4.50%
9th to 12th Grade, No Diploma	8,721	5.8%	10,819	5.8%	9,625	5.2%	8,239	4.50%
High School Diploma/ GED	36,832	24.6%	31,944	17.2%	22,857	12.4%	26,636	14.70%
Some College, No Degree	40,497	27.0%	47,023	25.3%	39,211	21.3%	31,588	17.40%
Associate Degree*	-	-	13,470	7.2%	11,298	6.2%	12,426	6.80%
Bachelor's Degree	57,301	38.3%	47,490	25.5%	56,549	30.8%	55,001	30.30%
Graduate Degree**	-	-	28,832	15.5%	37,699	20.5%	39,619	21.80%
Total	149,763	100.0%	186,164	100.0%	183,694	100.0%	181,645	100.0%

Source: U.S. Census Bureau

* Not a separate category in 1980, data included with 'Some College, No Degree'

Table 5 - Marin's Per-Pupil Expenditures Continue to Outpace the Bay Area and State (Page 5)

	Year	Marin	Bay Area	California
Average Daily Attendance	1998-99	26,991	-	-
	1999-00	27,170	-	-
	2000-01	27,168	-	-
	2001-02	27,209	-	-
	2002-03	27,383	-	-
	2003-04	27,000	-	-
	2004-05	26,967	-	-
	2005-06	27,094	-	-
	2006-07	27,436	-	-
	2007-08	27,542	-	-
Per Pupil Expenditure	1998-99	$6,857	$5,872	$5,797
	1999-00	$7,567	$6,256	$6,188
	2000-01	$8,511	$6,985	$6,360
	2001-02	$9,380	$7,675	$6,719
	2002-03	$9,522	$7,755	$6,822
	2003-04	$9,639	$7,759	$7,667
	2004-05	$8,744	$7,417	$7,127
	2005-06	$9,320	$7,765	$7,521
	2006-07	$9,968	$8,406	$8,117
	2007-08	$10,515	$8,905	$8,594

Source: California Department of Education, Education Planning and Information Center

Table 6 - Scores Dip Over Two Years, but are Well Above State Average (Page 6)

		1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Marin County	Verbal and Math	1083	1096	1104	1108	1106	1100	1120	1118	1133	1126	1116
	Writing*	-	-	-	-	-	-	-	-	-	561	555
California	Verbal and Math	1004	1007	1005	1009	1008	1006	1012	1015	1020	1011	1006
	Writing*	-	-	-	-	-	-	-	-	-	495	491

Source: California Department of Education, Education Planning and Information Center
* The writing component was added to the SAT exam in the 2005-06 school year.

Table 7 - Dropout Rate Continues to Decrease and is One-Fifth the State Average (Page 7)

	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Marin County	1.2%	1.4%	1.3%	1.3%	0.7%	0.8%	0.8%	0.7%	0.6%	0.6%	1.0%	1.5%
California	3.9%	3.3%	2.9%	2.8%	2.8%	2.8%	2.7%	3.1%	3.2%	3.0%	3.4%	5.5%

Source: California Department of Education

Table 8 - Juvenile Crime Rates Vary, Misdemeanor Rates Higher Than State Average (Page 8)

Year	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Violent Crimes	822	789	726	832	767	642	580	481	554	495	511	639
Crimes per 1,000 Population	3.44	3.29	2.98	3.40	3.11	2.57	2.33	1.93	2.21	1.97	2.02	2.51
Annual Change	-	-4.3%	-9.4%	13.8%	-8.5%	-17.4%	-9.2%	-17.1%	14.6%	-11.0%	2.6%	24.2%
State per 1,000 Rate	9.51	8.48	7.81	6.86	6.11	6.11	6.06	5.89	5.69	5.40	5.12	5.18
Property Crimes	4,043	3,477	3,472	3,247	2,829	2,880	3,500	3,195	3,622	3,445	3,668	3,375
Crimes per 1,000 Population	16.92	14.52	14.27	13.25	11.47	11.51	14.06	12.83	14.47	13.70	14.54	13.25
Annual Change	-	-14.2%	-1.7%	-7.1%	-13.5%	0.4%	22.1%	-8.8%	12.8%	-5.3%	6.1%	-8.9%
State per 1,000 rate	27.34	23.77	22.16	19.44	16.50	16.77	18.01	18.91	19.29	19.46	19.52	18.90

Source: California Department of Justice

Table 10 - Marin Residents Politically Active (Page 10)

Percentage of Registered Voters Casting Ballots	1992 General Election	1996 General Election	2000 General Election	2004 General Election	2008 General Election
San Anselmo	86.8%	79.8%	86.6%	89.7%	91.9%
Belvedere	89.7%	83.3%	87.7%	90.7%	91.2%
Corte Madera	87.4%	81.6%	87.0%	89.1%	91.0%
Fairfax	86.2%	77.3%	84.4%	89.4%	91.4%
Larkspur	87.7%	81.8%	86.6%	89.3%	91.5%
Mill Valley	87.3%	80.9%	85.9%	90.1%	91.6%
Novato	86.2%	77.2%	83.7%	87.1%	90.2%
Ross	92.5%	80.4%	85.8%	88.5%	91.8%
Sausalito	85.2%	75.9%	80.8%	87.9%	91.2%
Tiburon	87.3%	79.5%	85.2%	89.9%	91.4%
San Rafael	85.9%	78.8%	83.4%	87.9%	90.1%
Unincorporated	85.7%	79.8%	85.3%	88.9%	90.9%
Marin County	**86.4%**	**79.2%**	**84.6%**	**89.5%**	**90.8%**
California	75.3%	65.5%	70.9%	76.0%	79.4%
United States	90.0%	82.3%	85.5%	88.5%	NA
Percentage of Elible Voters Registered to Vote					
Marin County	**87.3%**	**83.9%**	**78.9%**	**87.6%**	**85.9%**
California	72.4%	80.2%	73.2%	75.0%	74.6%
United States	68.2%	65.9%	63.9%	65.9%	NA

Sources: U.S. Census Bureau, California Secretary of State, and Marin County Registrar of Voters

Table 11 - Marin Per Capita Income Highest in Bay Area and California (Page 11)

2006	Total Personal Income	Net Earnings	Transfer Payments	Income Maintenance	Unemploy-ment Insurance	Retirement	Dividends/ Interest/Rent
Marin	$86,062	$53,453	$5,042	$264	$116	$4,663	$27,567
Bay Area	$54,735	$38,545	$4,928	$492	$131	$4,305	$11,263
California	$39,626	$27,563	$5,106	$663	$120	$4,323	$6,957
Marin 2005	$75,884	$50,679	$4,578	$258	$118	$2,333	$20,627
Marin 2003	$65,642	$45,533	$4,008	$230	$153	$3,625	$16,101
Marin 2001	$68,035	$46,623	$3,584	$202	$64	$3,317	$17,828
Marin 1999	$61,039	$41,846	$3,095	$208	$42	$2,844	$16,099
Marin 1997	$51,413	$34,229	$2,953	$209	$53	$2,692	$14,231
Marin 1995	$44,608	$29,429	$2,794	$217	$77	$2,500	$12,385

Source: U.S. Department of Commerce

Table 12 - Household Income in Marin Increasing at a Faster Rate Than the Bay Area (Page 12)

	1995	2000	2005	2010	2015	2020	2025	2030	2035
Marin	$111,050	$126,500	$121,600	$127,200	$134,100	$141,600	$148,900	$157,700	$166,300
Bay Area	$85,000	$104,000	$97,300	$102,000	$107,600	$113,600	$119,800	$126,400	$133,400
Difference	$26,050	$22,500	$24,300	$25,200	$26,500	$28,000	$29,100	$31,300	$32,900

Source: Association of Bay Area Governments
Note: Figures are in Constant 2000 Dollars

Table 13 - Household Occupancy Expected to Remain Relatively Constant Over Time (Page 13)

	1995	2000	2005	2010	2015	2020	2025	2030	2035
Marin County	2.34	2.34	2.34	2.34	2.35	2.35	2.34	2.34	2.34
Bay Area	2.65	2.69	2.69	2.70	2.70	2.70	2.70	2.70	2.70
Difference	0.32	0.35	0.35	0.36	0.35	0.35	0.36	0.36	0.36

Source: Association of Bay Area Governments, Projections 2009

Table 14 - New Housing Units Added Slowly (Page 14)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Single Family Detached	62,686	63,058	63,383	63,655	63,687	64,017	64,352	64,562	64,863	65,278	65,516	65,683	65,793
Condos, Town-homes	8,262	8,311	8,354	8,390	8,455	8,459	8,460	8,511	8,572	8,593	8,586	9,794	9,791
Apartments	30,258	30,438	30,595	30,727	30,729	30,731	30,888	31,144	31,265	31,480	31,507	31,985	31,990
Mobile Homes	2,065	2,077	2,088	2,097	2,123	2,128	2,129	2,131	2,131	2,131	2,131	2,131	2,131
Total	103,271	103,884	104,420	104,869	104,994	105,335	105,829	106,348	106,831	107,482	107,740	109,593	109,705

Source: California Department of Finance

Table 15 - High Percentage of Income Spent on Rent (Page 15)

	1980		1990		2000		2007	
	H/H Units	Percentage	H/H Units	Percentage	H/H Units	Percentage	H/H Units	Percentage
Less than 20%	10,009	28.9%	7,852	22.1%	9,745	26.9%	7,712	22.2%
20-24%	5,065	14.6%	4,752	13.4%	4,532	12.5%	4,011	11.5%
25-29%	3,397	9.8%	4,357	12.2%	4,530	12.5%	3,188	9.2%
30-34%	3,179	9.2%	3,571	10.0%	3,189	8.8%	2,504	7.2%
35% or More	10,865	31.4%	13,109	36.9%	12,565	34.7%	15,477	44.5%
Not Computed	2,067	6.0%	1,932	5.4%	1,660	4.6%	1,911	5.5%
Total Households	34,582	100.0%	35,573	100.0%	36,221	100.0%	34,803	100.0%
Mean Rent	$391	-	$863	-	$1,162	-	$1,482	-

Source: U.S. Census Bureau

Table 16 - Rental Rates Rebound and Many Still Priced Out of Market (Page 16)

	1996*	1997*	1998*	1999*	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009 Q1
1 bedroom	807	881	1,031	1,125	1,372	1,431	1,377	1,306	1,285	1,284	1,338	1,409	1,478	1,489
2 bedroom 1 bath	988	1,131	1,354	1,445	1,460	1,540	1,473	1,435	1,412	1,400	1,448	1,554	1,608	1,604

Source: REALFACTS

*Source: Marin-Sonoma Market Association

Table 17 - Need for Housing Assistance Continues, Affordable Housing in High Demand (Page 17)

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total Client Calls to Housing Assistance Line*	4,750	5,720	7,581	4,216	3,214	4,063	5,547	7,548	4,159	4,043	7,499	5,843
Types of Calls & Inquiries												
Section 8 Waiting List Status	3.0%	1.7%	14.1%	26.0%	31.0%	25.0%	3.1%	29.7%	11.8%	14.6%	11.5%	17.1%
Shared Housing	5.0%	2.8%	0.7%	1.0%	7.0%	10.0%	0.3%	1.1%	0.7%	0.1%	0.1%	0.0%
Emergency Shelter/ Transitional Housing	5.0%	2.8%	2.4%	4.0%	4.0%	5.0%	0.4%	0.4%	0.7%	0.0%	0.2%	0.0%
Landlord/Tenant Issues	12.0%	6.7%	3.0%	5.0%	3.0%	2.0%	2.0%	2.7%	1.4%	1.4%	1.1%	0.5%
Support Services	14.0%	7.8%	6.5%	11.0%	8.0%	15.0%	16.6%	22.9%	71.3%	62.2%	21.7%	9.9%
Rent Deposits or Back Rent	19.0%	10.6%	5.3%	9.0%	27.0%	30.0%	3.8%	8.5%	8.2%	1.1%	3.8%	2.0%
Housing Search Assistance	60.0%	33.3%	17.8%	31.0%	10.0%	13.0%	68.8%	27.1%	44.6%	41.5%	1.5%	0.2%
Affordable or Low Cost Housing	62.0%	34.4%	50.2%	87.0%	73.0%	85.0%	0.1%	3.0%	45.9%	42.3%	50.9%	59.4%
Temporary Rental Assistance	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	8.0%	5.3%	3.3%	9.1%	10.9%

Source: Marin Housing Authority

Table 18 - Home Sales Prices Drop While Overall Sales Decline (Page 18)

	Total Sales				Single-Family Houses			Condominiums and Townhouses		
Year	Number of Sales	Mean Price	Median Price	Mean Living Area	Number of Sales	Mean Price	Median Price	Number of Sales	Mean Price	Median Price
1997	4,046	$431,145	$352,500	1,820	3,056	$488,911	$400,000	990	$251,719	$224,000
1998	4,359	$464,428	$375,000	1,772	3,224	$536,263	$434,000	1,135	$260,380	$235,000
1999	4,495	$542,607	$422,250	1,790	3,246	$634,776	$499,000	1,249	$303,072	$272,500
2000	3,899	$661,667	$523,000	1,772	2,858	$772,354	$599,000	1,041	$357,781	$315,000
2001	3,068	$715,027	$565,000	1,770	2,239	$829,824	$650,000	829	$404,980	$367,000
2002	3,730	$747,572	$600,000	1,763	2,730	$859,215	$685,000	1,000	$488,261	$435,000
2003	4,173	$778,122	$649,000	1,853	3,097	$889,380	$719,000	1,076	$457,891	$424,500
2004	4,743	$857,728	$718,000	1,845	3,405	$1,004,740	$810,000	1,338	$483,606	$465,000
2005	4,304	$996,159	$819,000	1,913	3,045	$1,181,432	$945,000	1,259	$548,061	$515,000
2006	3,345	$1,023,786	$830,000	1,886	2,400	$1,208,703	$960,000	945	$557,265	$521,895
2007	2,724	$1,142,496	$879,450	1,932	2,107	$1,287,539	$1,000,000	617	$647,187	$570,000
2008	2,153	$1,014,465	$767,000	1,894	1,570	$1,208,218	$914,000	583	$492,692	$415,000
Average	3,753	$781,267	$625,017	1,834	2,748	$908,446	$717,917	1,005	$437,741	$396,658

Source: Marin County Assessor

Table 19 - Housing Construction Lags Job Creation (Page 19)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Marin Jobs	107,600	111,600	112,400	112,100	111,600	111,000	109,700	108,800	108,700	109,400
Housing Units	132,900	134,200	141,700	140,100	135,200	131,600	129,700	129,800	131,900	133,300
Employed Marin Residents	104,420	104,869	104,994	105,335	105,829	106,348	106,831	107,482	107,740	108,380

Source: Employment Development Department, Labor Market Information Division

Table 20 - Total Vehicle Miles Traveled on the Rise (Page 20)

Daily Average	1990	1998	2000	2006	2010	2015	2020	2025	2030	2035
Total Miles Traveled (millions)	5.33	5.51	6.25	5.67	5.75	5.94	6.32	6.70	6.91	7.30
Per Capita Miles Traveled	27.6	27.0	30.4	27.0	26.5	26.4	27.1	28.3	29.0	30.4
Driving Age Population (15+)	192,994	203,848	205,199	210,100	217,000	224,900	233,000	236,900	238,400	240,400

Source: Metropolitan Transportation Commission

Table 21 - Vehicles Registered in Marin Increasing and Outnumbering Driving Age Population (Page 21)

	Total	Autos/SUV's	Pickup Trucks	Trailers	Motorcycles
1996	221,717	170,753	34,041	11,178	5,745
1997	212,258	164,476	32,032	11,170	4,580
1998	225,648	175,646	39,869	11,436	4,697
1999	214,087	166,473	31,693	11,38	4,533
2000	217,315	168,891	31,966	11,562	4,896
2001	235,679	180,953	34,628	14,465	5,633
2002	239,689	184,025	35,130	14,437	6,097
2003	232,712	178,628	33,914	14,129	6,041
2004	243,499	186,832	35,179	15,000	6,488
2005	238,045	182,120	33,770	15,531	6,624
2006	242,478	185,444	34,400	15,706	6,928
2007	242,953	187,531	34,621	13,556	7,245
2008	241,308	186,047	33,692	14,019	7,550

Source: California Department of Motor Vehicles

Table 22 - In and Out of County Commuting Continues to Increase (Page 22)

	Marin Residents Commuting to:				Marin Employees Commuting from:			
County	1980	1990	2000	2010	1980	1990	2000	2010
Marin	65,830	72,941	78,681	83,828	65,830	72,941	78,681	83,828
Alameda	3,526	5,256	4,729	5,613	1,119	2,723	3,745	3,653
Contra Costa	1,555	3,428	2,740	3,101	1,687	3,280	6,803	7,208
Napa	104	189	380	410	215	549	894	1,001
San Francisco	37,662	33,656	30,894	37,572	3,332	5,006	6,450	5,670
San Mateo	2,591	“3,212	2,614	3,364	643	1,406	973	847
Santa Clara	400	564	952	1,287	30	421	578	467
Solano	556	845	610	594	964	1,913	4,418	5,774
Sonoma	2,079	3,179	3,493	3,537	9,594	15,352	18,336	22,674
To/From Bay Area	48,473	50,329	46,412	55,478	17,584	30,650	42,197	47,294
To/From Area	191	237	469	491	179	587	997	1,324
Total Marin Resident Workers	114,494	123,507	125,562	139,797	-	-	-	-
Total Persons Working in Marin	-	-	-	-	83,593	104,178	121,875	132,446

	1980	1990	2000	2010
Marin Resident Worker/Marin Employee Ratio	1.4	1.2	1.0	1.1

Sources: U.S. Census Bureau, Metropolitan Transportation Commission

Table 23 - Congestion Costs Vary with Economic Health but Higher Over the Long Term (Page 24)

	1995	1996	1998	1999	2000	2001	2002	2003	2004	2005	2006	2008
Hours of Delay	4,900	6,300	7,200	7,700	9,900	7,900	8,400	6,200	7,410	9,800	9,400	11,500

Sources: Metropolitan Transportation Commission, Caltrans District 4, Office of Highway Operations

Table 24 - Vehicle Emissions Show Improvement, Carbon Dioxide Largest Emission (Page 25)

Tons/Year	1995	2000	2005	2008	2010	2015	2020
Carbon Monoxide	45,147.2	32,735.4	19,532.6	15,279.3	12,937.8	8,733.7	6,307.6
Nitrogen Oxide	5,428.6	4,358.8	3,201.1	2,731.3	2,407.9	1,743.6	1,222.0
Hydrocarbons	4,766.9	3,409.5	2,089.3	1,665.1	1,434.1	1,042.8	824.9

Lbs/Year (thousands)	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Carbon Dioxide	2,299	2,332	2,367	2,401	2,459	2,489	2,514	2,520	2,493	2,478	2,461	2,457

Source: California Air Resources Board

Table 25 - Mobile Sources Account For Vast Majority of Airborne Pollutant Sources (Page 26)

CO SOURCES	1995	2000	2005	2008	2010
Stationary	0.2	0.3	0.4	0.4	0.4
Area-wide	13.1	13.3	14.4	14.0	13.9
On-Road Vehicle	123.7	89.7	53.5	41.9	35.4
Other Mobile	33.5	30.4	26.1	25.3	24.8
TOTAL	170.6	133.7	94.4	81.5	74.5
PM10 SOURCES					
Stationary	0.2	0.2	0.3	0.7	0.7
Area-wide	8.2	8.6	9.0	9.0	9.1
On-Road Vehicle	0.3	0.3	0.3	0.3	0.3
Other Mobile	0.9	1.0	1.1	1.1	1.1
TOTAL	9.6	10.1	10.6	11.1	11.2
ROG SOURCES					
Stationary	4.2	3.1	2.6	2.4	2.4
Area-wide	4.7	4.6	4.4	4.5	4.5
On-Road Vehicle	13.1	9.3	5.7	4.6	3.9
Other Mobile	7.2	7.2	5.8	5.1	4.8
TOTAL	29.2	24.3	18.6	16.6	15.6
NOx SOURCES					
Stationary	0.6	0.7	0.4	0.4	0.4
Area-wide	0.9	0.9	0.9	1.0	1.0
On-Road Vehicle	14.9	11.9	8.8	7.5	6.6
Other Mobile	10.6	11.2	12.1	12.2	12.2
TOTAL	27.0	24.8	22.1	21.0	20.1

Source: California Air Resources Board - 2009 Almanac Data

Table 26 - Mobile Sources Account For Vast Majority of Airborne Pollutant Sources (Page 28)

Total Vehicle Fuel Consumption	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Marin (Million Gallons)	117.5	119.2	121.0	122.7	125.7	127.2	128.5	128.8	127.4	126.7	125.8	125.6
Per Vehicle Consumption (Gallons)												
Marin	N/A	566.2	602.0	606.7	620.1	618.4	581.0	571.9	583.0	554.4	565.4	553.7
Bay Area	N/A	N/A	636.8	609.6	614.6	597.3	607.3	587.9	590.8	536.4	577.7	549.9
California	N/A	N/A	579.4	551.9	553.5	537.5	539.2	527.4	531.5	501.4	520.8	516.5

Sources: Caltrans Transportation and Planning Program, California Department of Motor Vehicles

Table 27 - Marin Waste Diversion Far Exceeds Disposal, and Generation Rate is Declining (Page 29)

Year	Generated	Disposed	Diverted*	Waste Exported	Waste Imported
1995	342,852	241,365	101,487	NA	NA
1996	387,855	224,561	143,294	4,654	49,511
1997	399,981	227,779	172,202	2,966	69,350
1998	525,336	256,403	268,933	13,128	33,510
1999	547,544	229,964	317,580	43,799	187,577
2000	548,457	216,211	332,246	35,471	198,510
2001	649,113	234,511	414,602	32,879	175,369
2002	580,865	202,078	378,787	23,485	192,045
2003	678,388	228,786	449,602	39,131	170,269
2004	747,979	225,028	522,951	57,090	180,995
2005	680,829	237,146	443,683	93,043	185,749
2006	693,903	243,038	450,865	96,213	217,739
2007	585,760	229,272	356,488	93,372	216,760
2008	NA	210,849	NA	77,065	202,522

Source: Marin County Department of Public Works, Waste Management Division

* Includes curbside recycling, buy-back, compost, drop-off, MRCC, inerts diverted, and alternative daily cover, but excludes biomass

Table 28 - Energy Generation by Natural Gas Remains on Top, Out of State Imports Up (Page 30)

(Gigawatt Hours)	2001		2002		2003		2004		2005		2006	
Total Generation	265,059	100%	272,059	100%	276,969	99.9%	289,359	99.9%	287,977	100%	295,268	100%
Hydroelectric	25,005	9.4%	31,221	11.5%	36,140	13.0%	34,372	11.9%	39,891	13.9%	48,431	16.4%
Nuclear	33,294	12.6%	34,353	12.6%	35,594	12.9%	30,241	10.5%	36,155	12.6%	32,036	10.8%
Coal	27,636	10.4%	27,817	10.2%	27,294	9.9%	28,589	9.9%	28,129	9.8%	17,642	6.0%
Oil	1,328	0.5%	481	0.2%	107	0.0%	119	0.0%	148	0.1%	134	0.0%
Natural Gas	113,145	42.7%	90,991	33.4%	91,994	33.2%	104,612	36.2%	96,047	33.4%	108,319	36.7%
Geothermal	13,619	5.1%	13,867	5.1%	13,771	5.0%	14,000	4.8%	14,380	5.0%	13,226	4.5%
Organic Waste	6,185	2.3%	6,261	2.3%	5,935	2.1%	5,903	2.0%	6,027	2.1%	5,682	1.9%
Wind	3,242	1.2%	3,546	1.3%	3,316	1.2%	4,258	1.5%	4,084	1.4%	4,420	1.5%
Solar	837	0.3%	851	0.3%	759	0.3%	741	0.3%	660	0.2%	616	0.2%
Imported	40,768	15.4%	62,859	23.1%	61,811	22.3%	66,278	22.9%	62,456	21.7%	64,762	21.9%

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Renewable	29.6%	28.0%	24.5%	24.4%	23.5%	23.2%	21.8%	26.6%	27.9%	26.6%	28.8%	28.8%
Non-Renewable	70.4%	72.0%	75.5%	75.6%	76.5%	76.8%	78.2%	73.4%	72.1%	73.4%	71.2%	71.2%

Source: California Energy Commission

Table 29 - Residential Per Capita Consumption Varies, Non-Residential Use Decreasing (Page 32)

Year	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Residential	28,004	29,728	31,408	29,010	31,124	32,814	34,085	33,660	33,358	33,595	32,073	33,054	33,682	33,730
Non-Residential	6,956	7,580	8,117	7,406	8,454	8,853	9,311	9,068	9,891	9,842	8,279	7,643	7,630	7,777
Total	34,960	37,308	39,525	36,415	39,578	41,667	43,396	42,729	43,249	43,437	40,352	40,698	41,312	41,508
Cubic Feet/ Resident	5,269	5,580	5,864	5,345	5,658	5,901	6,116	6,009	5,865	5,830	5,548	5,657	5,744	5,732

Sources: Marin Municipal Water District, North Marin Water District

Table 30 - Energy Crises has Tempering Effect, but Usage Trends Upward Over Time (Page 33)

Annual Kilowatt Hours	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Per Dwelling Unit	6,435	6,483	6,514	6,774	6,948	6,940	6,244	6,399	6,540	6,558	6,560	6,700	6,845	6,565
Per Commercial Meter	50,137	50,573	51,914	50,486	52,450	53,853	48,812	48,208	50,329	48,119	48,030	48,548	46,765	53,876

Source: California Energy Commission

Table 31 - Agriculture Production Jumps to New Highs (Page 34)

Production Value (000)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Livestock Products	$35,958	$38,655	$33,906	$27,456	$30,397	$23,782	$25,137	$33,244	$31,282	$27,125	$38,956	$35,624
Livestock & Poultry	$10,664	$8,330	$10,490	$11,310	$10,552	$10,104	$12,836	$11,126	$10,631	$11,327	$15,869	$13,869
Field & Orchard Crops	$7,162	$6,948	$7,170	$7,158	$7,668	$7,467	$7,524	$7,010	$6,954	$7,973	$9,031	$10,540
Aquaculture Products	$3,007	$1,548	$1,266	$1,450	$1,608	$2,397	$2,492	$2,853	$3,264	$2,594	$2,632	$2,918
Nursery Crops	$547	$683	$707	$813	$674	$725	$684	$662	$689	$453	$642	$921
Total	$57,338	$56,164	$53,539	$48,187	$50,899	$44,475	$48,673	$54,895	$52,820	$49,472	$67,130	$63,872

Source: Marin County Department of Agricultural Weights and Measures

Table 32 - Significant Increases in Organic Production Gains and Value (Page 35)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total Acres	124	184	312	385	396	357	810	1,560	2,330	4,888	11,300	17,420	18,585	20,598
Registered Growers	24	28	29	28	26	28	23	24	33	34	38	46	52	56
Gross Production (millions)	2.4	3.3	3.1	3.2	3.4	3.2	3.3	3.9	4.0	3.6	4.2	4.3	5.5	17.4

Source: Marin County Department of Agricultural Weights and Measures

Table 33 - Taxable Sales Growth Follows Economic Trends, but Marin Less Volatile than Bay Area

Table 33A - Taxable Sales - Retail Establishments (Page 36)

	Taxable Sales			Sales Per Establishment			Per Capita Sales		
Year	Taxable Sales	% Change	Inflation Adj. Change	Retail Establish-ments	Sales Per Establishment	% Change	Sales Per Capita	% Change	Inflation Adj. Change
1994	$1,879,802,000	3.7%	2.1%	2,988	$629,117	3.6%	$7,920	3.1%	1.5%
1995	$1,939,316,000	3.2%	1.2%	3,020	$642,158	2.1%	$8,142	2.8%	0.8%
1996	$2,061,445,000	6.3%	3.7%	2,996	$688,066	7.1%	$8,616	5.8%	3.2%
1997	$2,227,459,000	8.1%	3.9%	3,045	$731,514	6.3%	$9,227	7.1%	2.9%
1998	$2,394,890,000	7.5%	4.3%	3,165	$756,679	3.4%	$9,738	5.5%	2.3%
1999	$2,665,857,000	11.3%	7.1%	3,258	$818,250	8.1%	$10,752	10.4%	6.2%
2000	$2,958,289,000	11.0%	5.5%	3,396	$871,110	6.5%	$11,963	11.3%	5.8%
2001	$2,904,420,000	-1.8%	-5.3%	3,450	$841,861	-3.4%	$11,725	-2.0%	-5.5%
2002	$2,864,129,000	-1.4%	-2.8%	3,662	$782,122	-7.1%	$11,587	-1.2%	-2.6%
2003	$2,900,754,000	1.3%	0.2%	3,944	$735,485	-6.0%	$11,761	1.5%	0.4%
2004	$3,074,343,000	6.0%	4.7%	4,105	$748,926	1.8%	$12,501	6.3%	5.0%
2005	$3,165,743,000	3.0%	1.7%	4,237	$747,166	-0.2%	$12,819	2.5%	1.2%
2006	$3,244,796,000	2.5%	-0.7%	4,244	$764,561	2.3%	$13,045	1.8%	-1.4%
2007	$3,301,467,000	1.7%	-1.1%	4,149	$795,726	4.1%	$13,307	2.0%	-0.8%
Change (1994-2007)	$1,421,665,000	75.6%	37.7%	1,161	$166,609	26.5%	$5,387	68.0%	30.1%

Source: State Board of Equalization

Table 33B - Taxable Sales - All Establishments (Page 36)

	Taxable Sales			Sales Per Establishment			Per Capita Sales		
Year	Taxable Sales	% Change	Inflation Adj. Change	All Establishments	Sales Per Establishment	% Change	Sales Per Capita	% Change	Inflation Adj. Change
1994	2,564,628,000	4.1%	2.5%	12,059	$212,673	2.6%	$10,806	3.5%	1.9%
1995	2,686,020,000	4.7%	2.7%	12,196	$220,238	3.6%	$11,277	4.4%	2.4%
1996	2,902,225,000	8.0%	5.4%	12,010	$241,651	9.7%	$12,130	7.6%	5.0%
1997	3,108,231,000	7.1%	2.9%	11,678	$266,161	10.1%	$12,875	6.1%	1.9%
1998	3,378,233,000	8.7%	5.5%	11,429	$295,584	11.1%	$13,737	6.7%	3.5%
1999	3,670,921,000	8.7%	4.5%	11,200	$327,761	10.9%	$14,806	7.8%	3.6%
2000	4,056,025,000	10.5%	5.0%	11,076	$366,199	11.7%	$16,402	10.8%	5.3%
2001	3,950,152,000	-2.6%	-6.1%	11,020	$358,453	-2.1%	$15,947	-2.8%	-6.3%
2002	3,848,444,000	-2.6%	-4.0%	11,007	$349,636	-2.5%	$15,569	-2.4%	-3.8%
2003	3,891,300,000	1.1%	0.0%	11,133	$349,528	0.0%	$15,778	1.3%	0.2%
2004	4,053,515,000	4.2%	2.9%	11,080	$365,841	4.7%	$16,482	4.5%	3.2%
2005	4,171,444,000	2.9%	1.6%	11,138	$374,524	2.4%	$16,891	2.5%	1.2%
2006	4,285,264,000	2.7%	-0.5%	11,025	$388,686	3.8%	$17,228	2.0%	-1.2%
2007	4,397,181,000	2.6%	-0.2%	10,851	$405,233	4.3%	$17,724	2.9%	0.1%
Change (1994-2007)	1,832,553,000	71.5%	33.6%	-1,208	$192,559	90.5%	$6,918	64.0%	26.12%

Source: State Board of Equalization

Table 34 - Assessed Valuation Increases Sharply, Even with Proposition 13 Cap (Page 37)

($ millions)	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09
Secured Roll											
Land	$10,374	$11,420	$12,826	$14,482	$15,745	$17,170	$18,780	$21,002	$23,300	$25,125	$26,862
Improvements	$15,138	$16,227	$17,557	$18,938	$20,137	$21,239	$22,427	$23,937	$25,628	$27,177	$28,494
Personal Property	$76	$74	$79	$97	$86	$107	$99	$106	$108	$133	$141
Unsecured Roll											
Land	$62	$71	$78	$79	$80	$78	$81	$82	$72	$71	$69
Improvements	$398	$440	$490	$525	$576	$614	$629	$650	$612	$613	$630
Personal Property	$574	$634	$689	$753	$766	$758	$756	$755	$751	$730	$753
Total	$25,626	$27,804	$30,625	$33,662	$36,120	$38,664	$41,381	$45,062	$50,471	$53,849	$56,949

Source: Marin County Assessor-Recorder

Table 35 - Low Retail and Office Construction Trends, but Industrial Construction Jumps (Page 38)

	Office	Retail	Industrial	Total
1995	633,940	60,853	0	694,793
1996	39,252	317,420	25,927	382,599
1997	229,753	134,460	74,350	438,563
1998	83,109	65,087	113,380	261,576
1999	728,760	43,925	93,183	865,868
2000	511,417	31,613	82,440	625,470
2001	556,814	31,207	97,486	685,507
2002	473,118	71,118	69,122	613,358
2003	494,482	29,019	102,019	625,520
2004	211,200	2,180	38,947	252,327
2005	5,300	9,883	39,381	54,564
2006	12,413	0	0	12,413
2007	69,336	0	100,787	170,123
2008	118,792	130,050	32,122	280,964
Total	4,167,686	926,815	869,144	5,512,558
Annual Average	297,692	66,201	62,082	425,975

Source: Marin County Community Development Agency

Table 36 - Office Vacancy Rate is Volatile, Retail and Industrial More Stable (Page 40)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009 Q2
Office	12.6%	10.8%	8.5%	5.9%	2.5%	3.0%	21.9%	20.2%	17.7%	17.2%	15.6%	16.3%	15.8%	14.4%	20.9%
Retail	4.9%	5.6%	2.8%	3.1%	3.5%	2.1%	2.3%	3.5%	3.9%	3.3%	3.1%	5.5%	4.0%	4.8%	5.1%
Industrial	7.6%	3.9%	3.4%	2.6%	0.9%	2.2%	1.5%	2.8%	4.0%	4.2%	4.7%	4.2%	2.9%	2.6%	3.5%

Source: Orion Partners, Keegan and Coppin Real Estate

Table 37 - Professionals, Managers, Salespeople Comprise Majority of Marin's Workforce (Page 42)

	1980		1990		2000		2007		1980-2007
Category	Number of Employed Residents	Percent of Total	Number of Employed Residents	Percent of Total	Number of Employed Residents	Percent of Total	Number of Employed Residents	Percent of Total	Percent Change in Employment
Sales	17,653	15.1%	23,626	18.5%	26,041	19.1%	62,319	48.5%	31.4%
Management, Administration	20,745	17.8%	26,180	20.5%	29,722	21.8%	19,296	15.0%	41.7%
Service Providers	13,617	11.7%	12,387	9.7%	11,316	8.3%	32,184	25.0%	-12.7%
Professional, Technical, Crafts	37,169	31.8%	39,972	31.3%	43,356	31.8%	339	0.3%	-80.9%
Clerical, Administrative Support	19,232	16.5%	18,262	14.3%	18,542	13.6%	9,887	7.7%	0.7%
Production, Laborers, Construction	8,394	7.2%	7,152	5.6%	7,362	5.4%	4,557	3.5%	-37.6%
TOTAL	116,810	100.0%	127,579	100.0%	136,339	100.0%	128,582	100.0%	10.1%

Sources: U.S. Census Bureau

Table 38 - Marin's Unemployment Rate Up Due to Depressed Economy (Page 43)

Year	Marin	Bay Area	California	United States
1995	4.3%	5.8%	7.8%	5.6%
1996	3.4%	4.5%	7.2%	5.4%
1997	2.9%	3.8%	6.3%	4.8%
1998	2.3%	3.5%	5.9%	4.4%
1999	1.9%	3.0%	5.2%	4.2%
2000	1.6%	2.5%	4.9%	4.0%
2001	2.5%	4.1%	5.4%	4.8%
2002	3.9%	6.5%	6.7%	5.8%
2003	4.9%	6.8%	6.8%	6.0%
2004	4.5%	5.8%	6.2%	5.5%
2005	4.0%	4.9%	5.4%	5.1%
2006	3.5%	4.0%	4.9%	4.6%
2007	3.7%	4.5%	5.4%	4.6%
2008	4.5%	5.8%	7.2%	5.8%
May-09	7.5%	10.0%	11.2%	9.4%
Average	3.4%	4.7%	6.1%	5.0%

Source: California Employment Development Department

Table 39 - Public Sector Employment Declines; Number of Agencies Remains Stable (Page 44)

Table 39A - Federal

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008 Q3
Total Establishments	44	37	37	38	40	40	38	37	35	38	41	41
Total Employees	1,100	1,000	1,100	1,100	1,000	1,000	900	900	900	905	683	937
Average Annual Wage	$42,255	$43,609	$43,323	$43,635	$46,996	$48,435	$48,854	$54,367	$51,504	$53,952	$53,760	$48,672

Source: California Employment Development Department

Table 39B - State

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008 Q3
Total Establishments	45	46	46	42	42	42	42	46	46	48	47	51
Total Employees	1,700	1,700	1,700	1,700	1,700	1,700	1,800	1,800	1,800	1,874	1,929	2,155
Average Annual Wage	$32,056	$29,583	$30,671	$33,993	$36,555	$35,236	$36,828	$38,542	$37,536	$40,416	$45,504	$44,880

Source: California Employment Development Department

Table 39C - Local

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008 Q3
Total Establishments	59	61	60	57	57	58	59	61	59	57	57	55
Total Employees	11,200	11,500	11,800	12,000	13,900	12,400	12,100	11,700	12,000	10,678	10,963	10,040
Average Annual Wage	$42,197	$44,912	45,870	$49,197	$50,215	$50,565	$54,172	$56,046	$53,837	$49,104	$51,600	$56,544

Source: California Employment Development Department

Table 39D - Education

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008 Q3
Total Establishments	93	102	116	120	123	120	113	111	111	111	113	115
Total Employees	6,000	6,200	6,500	6,600	6,900	6,700	6,600	6,200	5,711	5,222	4,468	4,215
Average Annual Wage	$29,252	$30,267	$31,305	$33,370	$35,872	$36,630	$39,471	$39,570	$40,305	$41,040	$42,096	$42,048

Source: California Employment Development Department

Table 40 - Wages Dropped While High Tech Employment Retreats to 1994 Levels (Page 45)

Employees	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Services	4,253	4,473	5,256	5,651	5891	5873	6027	6081	4762	4157	3731	3434	3866
Manufacturing	644	743	621	769	722	495	448	381	217	75	82	77	63
Total	4,897	5,216	5,877	6,420	6,613	6,368	6,475	6,462	4,979	4,232	3,813	3,511	3,929
Mean Wage	$54,246	$57,515	$61,129	$65,096	$74,191	$77,491	$86,286	$83,180	$80,417	$87,601	$124,165	$145,578	$96,632

Source: U.S. Census, California Employment Development Department

Cluster Focus

Table 41 - Marin County Employment (Page 46)

Employees Per Establishment:	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	8,810	9,008	9,100	9,131	9,154	9,211	9,167	9,046	9,057	9,024	9,049
20-100	819	792	800	856	958	904	887	864	903	875	901
More Than 100	119	125	131	144	144	142	129	130	123	124	126
Total Establishments	9,748	9,925	10,031	10,131	10,256	10,257	10,183	10,040	10,083	10,023	10,076
Employees	94,024	97,674	97,596	101,281	109,012	106,275	102,449	103,386	102,053	99,323	101,358
Payroll (000,000)	$3,020	$3,245	$3,566	$3,876	$4,540	$4,388	$4,366	$4,673	$4,846	$4,873	$5,059
Per Capita Wage	$32,120	$33,226	$36,542	$38,278	$41,652	$41,289	$42,619	$45,203	$47,493	$49,065	$49,919

Source: U.S. Census, County Business Patterns

41A - Industry Cluster: Information Services (Page 48)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	242	347	250	260	247	243	251	247	243
20-100	45	42	43	45	37	42	30	27	31
More Than 100	12	15	17	11	12	11	15	9	10
Total Establishments	299	404	310	316	296	296	289	283	284
Employees	7,518	7,703	7,842	7,658	6,550	6,633	4,515	4,015	4,592
Payroll (000)	$508,610	$569,211	$640,664	$605,385	$538,150	$543,660	$496,987	$491,092	$478,005
Per Capita Wage	$67,652	$73,895	$81,697	$79,053	$82,160	$81,963	$110,075	$122,314	$104,095

Source: U.S. Census, County Business Patterns

41B - Industry Cluster: Real Estate, Rental, and Leasing (Page 49)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	485	488	490	552	568	603	615	640	618
20-100	20	20	26	29	24	22	24	24	26
More Than 100	3	3	2	1	1	2	3	3	1
Total Establishments	508	511	518	582	593	627	642	667	645
Employees	2,718	2,773	2,761	2,799	2,761	3,272	4,520	3,084	3,131
Payroll (000)	$90,231	$92,702	$98,554	$106,539	$105,079	$147,343	$273,408	$148,267	$152,291
Per Capita Wage	$33,198	$33,430	$35,695	$38,063	$38,058	$45,031	$60,488	$48,076	$48,640

Source: U.S. Census, County Business Patterns

41C - Industry Cluster: Finance and Insurance (Page 50)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	572	591	606	596	652	663	660	656	660
20-100	25	34	27	37	37	38	36	44	36
More Than 100	9	9	9	9	11	11	9	8	9
Total Establishments	606	634	642	642	700	712	705	708	705
Employees	6,879	7,479	7,749	8,473	8,097	8,465	7,480	6,948	6,834
Payroll (000)	$473,923	$510,212	$590,159	$646,683	$676,341	$747,528	$823,271	$783,790	$747,641
Per Capita Wage	$68,894	$68,219	$76,159	$76,323	$83,530	$88,308	$110,063	$112,808	$109,400

Source: U.S. Census, County Business Patterns

41D - Industry Cluster: Professional, Scientific, and Technical Services (Page 51)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	1,624	1,646	1,713	1,710	1,755	1,715	1,721	1,717	1,759
20-100	72	81	81	87	75	61	71	69	72
More Than 100	5	6	9	12	8	7	7	10	11
Total Establishments	1,701	1,733	1,803	1,809	1,838	1,783	1,799	1,796	1,842
Employees	8,112	9,035	9,578	9,966	9,236	8,443	9,008	8,944	9,771
Payroll (000)	$431,060	$505,893	$625,770	$618,766	$546,490	$522,033	$573,859	$627,674	$728,849
Per Capita Wage	$53,139	$55,993	$65,334	$62,088	$59,170	$61,830	$63,705	$70,178	$74,593

Source: U.S. Census, County Business Patterns

41E - Industry Cluster: Management of Companies and Enterprises (Page 52)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	31	33	26	31	46	39	43	53	46
20-100	14	13	16	17	22	16	15	12	15
More Than 100	3	3	3	5	2	4	5	5	4
Total Establishments	48	49	45	53	70	59	63	70	65
Employees	1,192	1,339	1,264	1,579	1,284	1,461	1,804	1,647	1,656
Payroll (000)	$76,810	$80,496	$88,027	$104,134	$94,858	$119,107	$127,857	$135,512	$153,493
Per Capita Wage	$64,438	$60,117	$69,642	$65,949	$73,877	$81,524	$70,874	$82,278	$92,689

Source: U.S. Census, County Business Patterns

41F - Industry Cluster: Administrative, Support, Waste Management, and Remediation Services (Page 53)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	31	33	26	31	46	39	43	53	46
20-100	14	13	16	17	22	16	15	12	15
More Than 100	3	3	3	5	2	4	5	5	4
Total Establishments	48	49	45	53	70	59	63	70	65
Employees	1,192	1,339	1,264	1,579	1,284	1,461	1,804	1,647	1,656
Payroll (000)	$76,810	$80,496	$88,027	$104,134	$94,858	$119,107	$127,857	$135,512	$153,493
Per Capita Wage	$64,438	$60,117	$69,642	$65,949	$73,877	$81,524	$70,874	$82,278	$92,689

Source: U.S. Census, County Business Patterns

41G - Industry Cluster: Educational Services (Page 54)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	148	148	151	146	149	126	144	130	119
20-100	23	22	25	27	22	22	24	24	29
More Than 100	7	7	8	10	9	8	9	9	8
Total Establishments	178	177	184	183	180	176	171	163	156
Employees	2,584	2,788	4,306	4,574	3,695	3,109	3,519	3,586	3,540
Payroll (000)	$69,258	$71,884	$91,240	$102,565	$105,144	$106,058	$113,868	$120,566	$120,704
Per Capita Wage	$26,803	$25,783	$21,189	$22,423	$28,466	$34,113	$32,358	$33,621	$34,097

Source: U.S. Census, County Business Patterns

41H - Industry Cluster: Manufacturing (Page 55)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	295	287	275	270	253	240	243	218	212
20-100	34	32	30	33	22	25	24	23	26
More Than 100	8	10	9	9	4	1	8	2	1
Total Establishments	337	329	314	312	279	266	268	243	239
Employees	4,731	4,227	3,923	3,750	2,609	2,300	2,279	2,214	2,263
Payroll (000)	$181,789	$160,800	$147,106	$144,310	$110,919	$94,746	$93,370	$88,891	$94,952
Per Capita Wage	$38,425	$38,041	$37,498	$38,483	$42,514	$41,194	$40,970	$40,150	$41,958

Source: U.S. Census, County Business Patterns

41I - Industry Cluster: Wholesale Trade (Page 56)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	542	516	496	476	473	456	430	436	451
20-100	26	29	33	37	37	34	36	36	37
More Than 100	5	6	5	5	2	3	3	4	3
Total Establishments	573	551	534	518	512	493	469	476	491
Employees	4,011	4,179	4,056	4,179	3,549	3,709	3,872	4,099	3,929
Payroll (000)	$185,344	$191,938	$221,956	$217,001	206,386	232,836	$238,649	$254,014	$258,083
Per Capita Wage	$46,209	$45,929	$54,723	$51,927	$58,153	$62,776	$61,635	$61,970	$65,687

Source: U.S. Census, County Business Patterns

41J - Industry Cluster: Retail Trade (Page 57)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	1,088	1,083	1,066	1,059	1,069	1,019	999	1,000	982
20-100	143	145	159	157	149	145	153	154	155
More Than 100	21	22	20	25	30	26	26	24	25
Total Establishments	1,252	1,250	1,245	1,245	1,248	1,190	1,178	1,178	1,162
Employees	14,412	14,737	16,407	16,385	16,074	15,798	15,736	15,699	15,738
Payroll (000)	$341,754	$387,903	$435,000	$439,389	$438,737	$440,700	$453,466	$469,484	$481,429
Per Capita Wage	$23,713	$26,322	$26,513	$26,817	$27,295	$27,896	$28,817	$29,905	$30,590

Source: U.S. Census, County Business Patterns

41K - Industry Cluster: Accommodation and Food Services (Page 58)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	562	539	525	519	515	532	539	545	532
20-100	141	149	158	156	157	154	160	151	155
More Than 100	7	6	6	3	4	3	3	10	6
Total Establishments	710	694	689	678	676	689	702	702	693
Employees	10,140	10,314	10,453	10,208	10,544	10,103	10,623	10,515	10,551
Payroll (000)	$138,990	$148,817	$171,848	$161,487	$169,935	$164,645	$177,022	$186,172	$197,186
Per Capita Wage	$13,707	$14,429	$16,440	$15,820	$16,117	$16,346	$16,664	$17,705	$18,689

Source: U.S. Census, County Business Patterns

41L - Industry Cluster: Health Care and Social Assistance (Page 59)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	933	901	882	880	943	953	960	953	962
20-100	75	72	74	81	86	87	96	96	92
More Than 100	24	28	23	22	22	20	16	14	15
Total Establishments	1,032	1,001	979	983	1,051	1,060	1,072	1,063	1,069
Employees	14,026	13,414	12,826	12,704	13,284	13,102	13,056	13,313	13,595
Payroll (000)	$428,133	$400,179	$408,906	$454,166	$492,801	$518,502	$540,968	$590,621	$621,652
Per Capita Wage	$30,524	$29,833	$31,881	$35,750	$37,097	$39,574	$41,434	$44,364	$45,727

Source: U.S. Census, County Business Patterns

41M - Industry Cluster: Arts, Entertainment, and Recreation (Page 60)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	182	179	188	190	200	210	212	202	210
20-100	22	32	26	28	31	26	28	29	28
More Than 100	3	1	2	2	2	5	5	5	4
Total Establishments	207	212	216	220	233	241	245	236	242
Employees	2,203	2,209	2,235	2,382	2,501	2,716	2,864	2,862	2,670
Payroll (000)	$51,680	$58,733	$59,076	$66,231	$75,456	$78,073	$80,824	$88,479	$85,928
Per Capita Wage	$23,459	$26,588	$26,432	$27,805	$30,170	$28,746	$28,221	$30,915	$32,183

Source: U.S. Census, County Business Patterns

41N - Industry Cluster: Construction (Page 61)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	951	952	990	984	977	954	974	994	989
20-100	44	56	76	80	69	76	71	67	82
More Than 100	6	9	9	11	8	9	9	9	10
Total Establishments	1,001	1,017	1,075	1,075	1,054	1,039	1,054	1,070	1,081
Employees	5,815	6,892	8,254	9,110	8,498	8,375	8,583	8,824	8,920
Payroll (000)	$233,977	$296,208	$355,691	$385,469	$365,931	$365,418	$389,444	$411,090	$460,565
Per Capita Wage	$40,237	$42,979	$43,093	$42,313	$43,061	$43,632	$45,374	$46,588	$51,633

Source: U.S. Census, County Business Patterns

41O - Industry Cluster: Transportation and Warehousing (Page 62)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	87	85	94	88	95	97	89	92	102
20-100	18	18	16	18	17	15	19	17	15
More Than 100	2	2	3	2	1	2	2	2	1
Total Establishments	107	105	113	108	113	114	110	111	118
Employees	1,556	1,636	1,675	1,683	1,536	1,538	1,620	1,373	1,226
Payroll (000)	$44,640	$49,417	$47,797	$53,399	$52,569	$60,432	$59,657	$59,465	$41,517
Per Capita Wage	$28,689	$30,206	$28,536	$31,728	$34,225	$39,293	$36,825	$43,310	$33,864

Source: U.S. Census, County Business Patterns

41P - Industry Cluster: Motion Picture Industry (Page 63)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	66	66	67	80	76	74	81	82	83
20-100	8	7	7	8	8	15	9	8	10
More Than 100	3	6	4	4	4	3	1	2	1
Total Establishments	77	79	79	92	88	92	91	92	94
Employees	2,204	2,290	2,054	2,266	2,150	2,240	752	720	848
Payroll (000)	$162,243	$185,408	$209,993	$176,431	$219,371	$202,039	$67,414	$38,944	$39,620
Per Capita Wage	$73,613	$80,964	$102,236	$77,860	$102,033	$90,195	$89,646	$54,089	$46,722

Source: U.S. Census, County Business Patterns

41Q - Industry Cluster: Repair and Maintenance (Page 64)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	270	264	267	266	257	246	239	233	237
20-100	20	21	20	19	20	15	17	16	15
More Than 100	0	0	0	0	0	0	0	0	0
Total Establishments	290	285	287	285	277	261	256	249	252
Employees	1,696	1,872	1,860	1,825	1,730	1,511	1,610	1,502	1,641
Payroll (000)	$54,597	$59,569	$62,258	$65,675	$62,710	$60,944	$63,142	$66,931	$68,882
Per Capita Wage	$32,192	$31,821	$33,472	$35,986	$36,249	$40,334	$39,219	$44,561	$41,976

Source: U.S. Census, County Business Patterns

41R - Industry Cluster: Personal and Laundry Services (Page 65)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	223	212	214	202	205	199	197	199	217
20-100	7	13	12	13	10	11	14	13	11
More Than 100	1	1	0	0	0	1	1	1	1
Total Establishments	231	226	226	215	215	211	212	213	229
Employees	1,278	1,346	1,289	1,293	1,195	1,414	1,479	1,490	1,362
Payroll (000)	$19,915	$22,081	$25,652	$24,243	$23,835	$34,499	$37,162	$40,391	$38,764
Per Capita Wage	$15,583	$16,405	$19,901	$18,749	$19,946	$24,398	$25,126	$27,108	$28,461

Source: U.S. Census, County Business Patterns

41S - Industry Cluster: Religious, Civic, and Professional Organizations (Page 66)

Employees Per Establishment:	1998	1999	2000	2001	2002	2003	2004	2005	2006
Less Than 20	233	230	218	227	244	237	228	223	213
20-100	18	17	21	23	20	21	24	23	23
More Than 100	2	2	3	2	2	3	3	3	2
Total Establishments	253	249	242	252	266	261	255	249	238
Employees	2,269	2,152	2,200	2,242	2,244	2,294	2,341	2,290	2,253
Payroll (000)	$43,384	$44,677	$48,693	$54,827	$57,460	$60,516	$65,038	$68,084	$69,076
Per Capita Wage	$19,120	$20,761	$22,133	$24,455	$25,606	$26,380	$27,782	$29,731	$30,660

Source: U.S. Census, County Business Patterns

Appendix

Questions or comments regarding this report or for more information about the Marin Economic Commission:

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