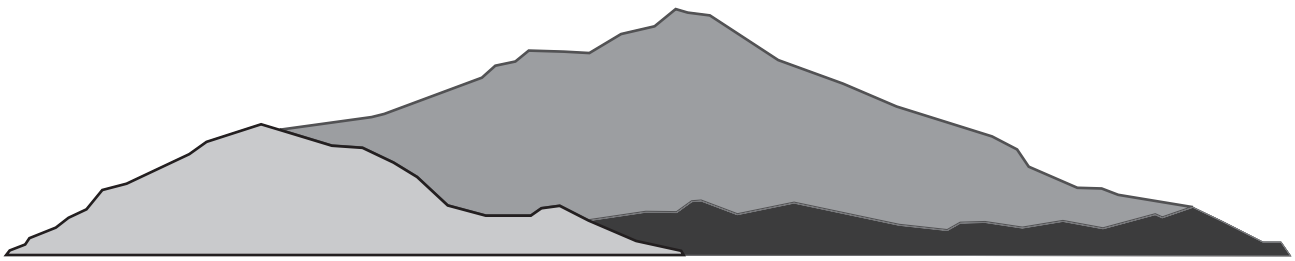
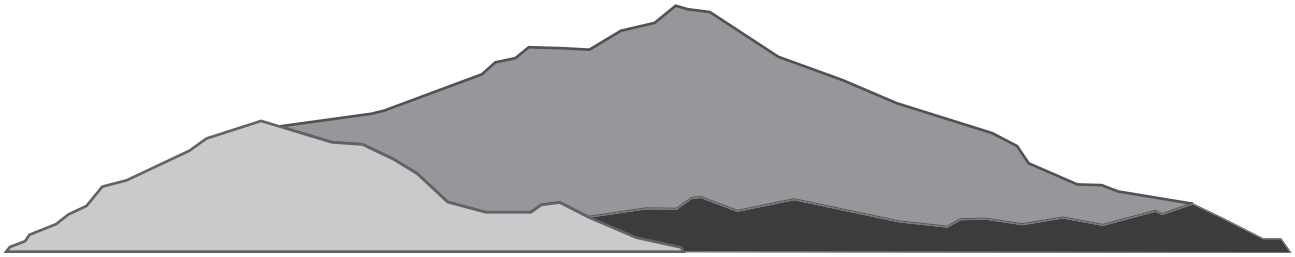
Marin Profile



A Survey of Economic, Social Equity, and Environmental Indicators

Marin Economic Commission
November, 2007

Marin Profile



A Survey of Economic, Social Equity, and Environmental Indicators

Marin Economic Commission
November, 2007

Marin Economic Commission
2006 - 2007

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 Council of Chambers of Commerce

Terry Hennessy
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Marin Profile Committee

Mark Horick

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Marin County Community Development Agency

Alex Hinds
Director

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Project Manager

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Planning Intern

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Summary

Introduction:

This is the sixth 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 2005, as available. While many of the social indicators have continued on similar trend lines over the study period, economic indicators and other indicators affected by economic conditions in many have started to show improvement. Marin has withstood many of the economic challenges of the past few years 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, its share of the regional population continues to decrease. Despite the slower growth rate, Marin is becoming more ethnically diverse, although it is far less diverse than the Bay Area as a whole. Household size has been relatively stable and is expected to only slightly decrease over the next twenty years. Overall, Marin residents continue to have a higher level of education and spend much more per pupil on education than the Bay Area or the state; they are also politically active. Performance on standardized tests is better than other areas, and continues to improve. Most students go on to college while the dropout rate continues to decrease. Crime rates are low and, with the exception of 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 2005, it has since rebounded and surpassed previous highs. Marin's workers remain employed at high rates, with the unemployment rate remaining well below the region, state, and nation. However, many of the higher-paying jobs that employ Marin residents are located outside of Marin.

Despite the high per-capita income in Marin, many employment opportunities in the county are in the lower-paying retail trade, food service and accommodation, or personal services sectors. Commuting patterns are reflective of many of the workers holding these jobs commuting from outside the county where they can find affordable housing to match their wages or, in the alternative, live in overcrowded conditions locally. Moderate wage earners such as teachers and public safety personnel, as well as doctors and medical support workers, still struggle to purchase a home. At the same time, home prices have escalated at record levels, enlarging the divide between rental and owner-occupied housing costs. Social service programs continue to assist lower income households with services but have had difficulty maintaining funding for many programs. Despite funding challenges and occasional local opposition, many affordable and workforce-targeted housing developments have come on line. 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 on the rise, which helps add housing stock more likely to be affordable to lower income households.

Marin has made significant progress on protecting substantial amounts of the county's land area in open space preserves with 84% of the county being either public parkland and open space, protected watershed, or agriculture. On the other hand, Marin is dependent on mostly non-renewable sources for its energy needs and is seeing increased vehicle registrations, fuel consumption, and is experiencing increased per capita motor vehicle travel. While Marin enjoys good air quality, vehicles are its primary source of air pollution which continued congestion exacerbates, but overall vehicle emissions have improved considerably despite the in-

creases in traffic congestion and miles traveled. Additional to affecting air quality, automobiles contribute to water pollution. Both residential and nonresidential water consumption is on the decline. Waste generation, which peaked in 2004, is on the decline.

Construction of new retail and industrial square footage, as well as their respective vacancy rates, remains relatively flat while the rate of new office construction has declined considerably. High office vacancy rates in the past few years have dampened enthusiasm for new office projects. Office vacancy rates have declined from their peak a few years ago but are still several-fold above the levels seen in the late 1990's.

Business growth and employment have seen mixed results. Overall, the number of businesses and employment has declined while wages are up slightly. Businesses employing fewer than 20 are still the lion's share of businesses, at just over 90%. For individual sectors, real estate, finance and insurance, administrative services, and arts, entertainment, and recreation have all seen increases in both employment and the number of businesses while information services, professional and technical services, retail, construction, and repair services have declined. Some sectors, such as health care and wholesale trade have seen increases in the number of businesses but decreased employment. Most sectors saw wage increases at or above inflation except for professional, technical, and administrative services. Technology sector employment has seen considerable declines, with the hardware and peripherals component rapidly becoming non-existent in Marin. Software, internet services, and the like have also seen declines, with employment sinking to 1994 levels. Agricultural production is improving and the organic and value-added components of that sector have seen significant increases in acreage and activity.

While Marin has many qualities that initially attracted businesses here, there are severe negative consequences that have evolved over time which have caused many companies to either partially or wholly locate out of Marin. Historically, as companies have moved on, others have come in to replace them. Although there are challenges with high vacancies in some commercial areas, Marin's downtowns have witnessed a renaissance that have led to increased substantial public and private investment, commercial activity, infill housing to encourage walking and transit use, and an attractiveness to some business sectors to locate close to transportation and services

Threats of the 'housing bubble' bursting have been circulating for some time and yet Marin (and much of the Bay Area) has continued to see double-digit annual price increases. Although the sales of homes has slowed due to an increase in mortgage interest rates, median home prices continue to reach record levels. While many have been able to move into home ownership or upsize because of record-low interest rates and more favorable lending standards, many renters are now even further priced out of the housing market. As the economy continues to rebound, the housing shortage will continue to exacerbate extended commute trends, traffic congestion problems, and their attendant 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 that allow for a healthy existence and are what give Marin many of its attractive qualities.

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.

MAKING THE CONNECTIONS: THE THREE E'S OF SUSTAINABILITY

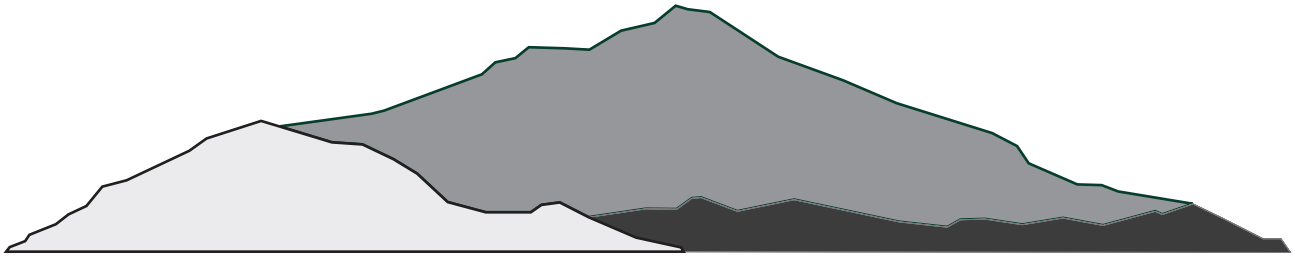
Historically, people have wanted to monitor changes in their community. Often median income, housing prices, or other statistics are used to characterize a region. Some, such as education statistics, may have a dramatic impact upon where people choose to live. Typically these statistics are evaluated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

Economic indicators such as median, household, and per-capita income; GNP; or 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 relationships between the economic indicators developed during the early part of this century and the environmental and social indicators that 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 one of 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 land, or habitat (environment) into built-up 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



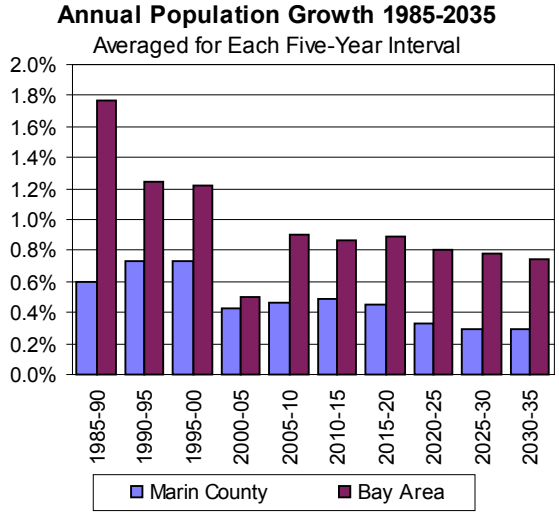
Marin Profile

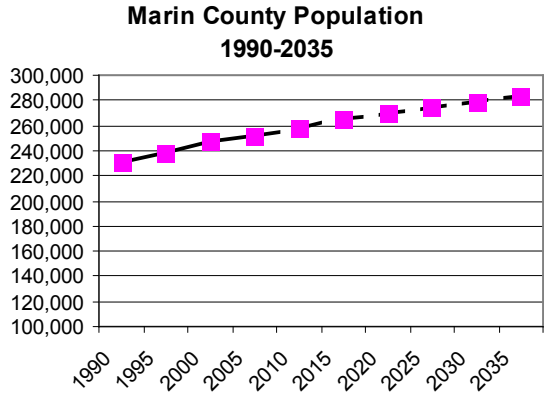
Marin Continues to Grow, but Slowly

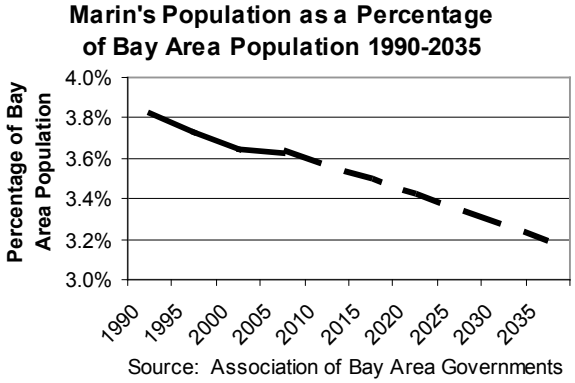
The population of Marin County increased 9.8% from 230,096 in 1990 to 252,600 in 2005. According to the Association of Bay Area Governments, between 2005 and 2035 the population is expected to increase another 12.5% to 283,100. Marin's growth rate over the past ten years has been relatively stable at approximately 0.7% annually, one of the lowest levels in the state. Marin's growth rate is projected to increase only a .03% between 2005 and 2010, when the greatest population increase is expected to occur between 2010 and 2015. Marin's population as a portion of the Bay Area decreased from 3.7% in 1995 to 3.6% by 2005 and is projected to be 3.3% of the Bay Area's population by 2025. While the growth rate of the Bay Area has been significantly higher than Marin, the Bay Area's rate of growth began declining in 1990 and is projected to approach Marin's annual rate by 2010.

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 few large sites remaining for new residential development; most growth will occur on smaller infill sites.





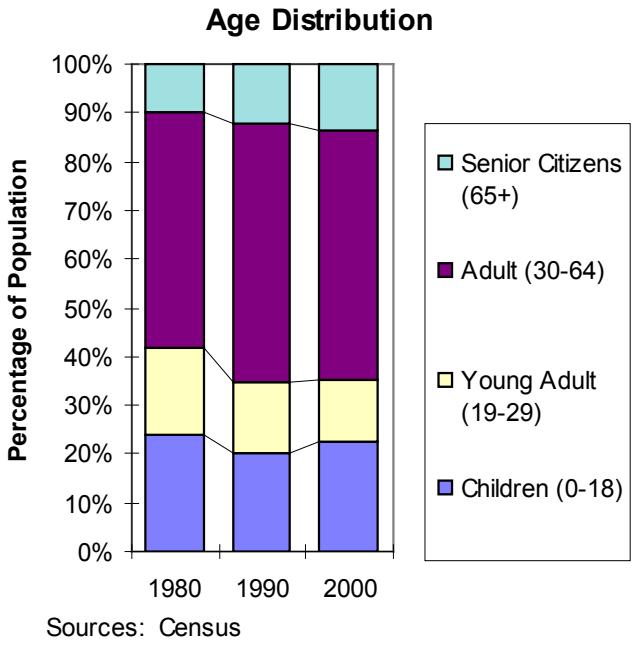


Source: Association of Bay Area Governments

Marin Getting Older Overall, 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. The number of children decreased from 24.0% of the population in 1980 to 20.1% in 1990, then increased to 22.7% in 2000.

Although young adults were 18.0% of the population in 1980 they were only 12.7% by 2000. The adult (age 30-64) share of the population was 48.4% in 1980, peaking at 53.2% in 1990 and then decreased to 50.9% in 2000. Senior citizens as a group have increased significantly, from 9.7% of the population in 1980 to 13.7% by 2000. Age data is derived from the decennial U.S. Census and, as a result, 2000 is the most recent data available.



Sources: Census

What this means:

The age distribution of the population has significant effects on schools, social services, the available workforce, and the economy. An older population normally would require fewer schools, and instead need additional health care facilities. However, with the recent increase in school age population, there will be funding needs for both ends of the age spectrum. The increasing number of seniors also means fewer residents in the workforce who generally have less disposable income. The decreasing number of young adults is indicative of the higher local cost of living, especially housing, and relatively few high-paying entry-level jobs.

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. Asian/Pacific Islanders, increased from 2.9% of the population in 1980 to 4.1% in 1990. The African-American share of the population increased from 2.5% in 1980 to 3.6% in 1990.

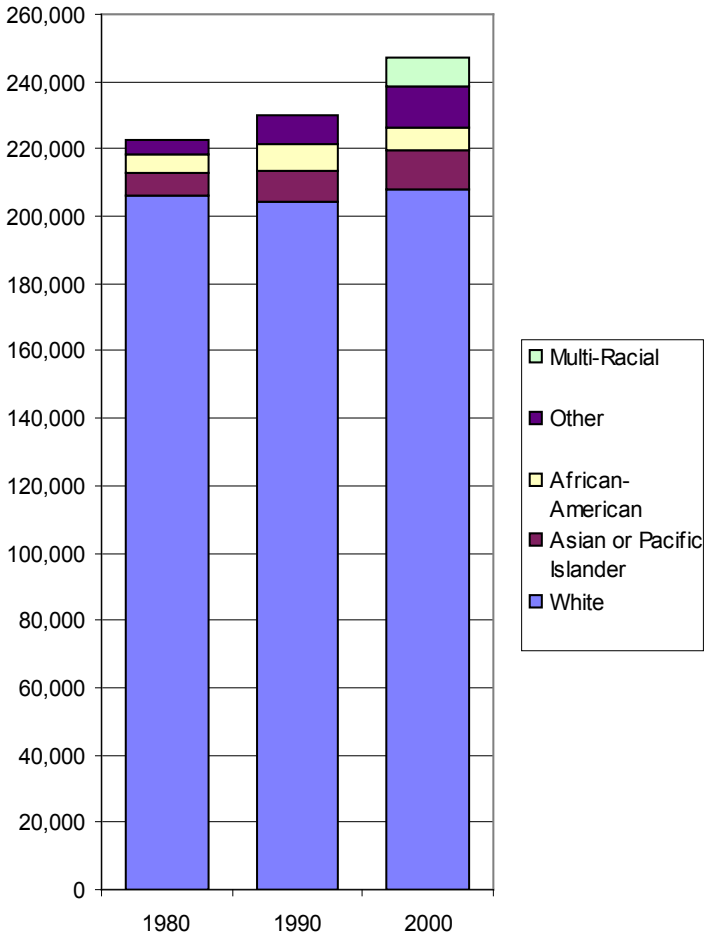
The 2000 Census allowed respondents to claim more than one race. There were 8,579 multi-racial persons in Marin in 2000, or 3.5% of the population. The white population was 207,800 or 84.0% of the total population; Asians or Pacific Islanders were 4.7% of the population or 11,591 persons; African-Americans numbered 7,142 (2.9%); and other races comprised 4.9% of the population with 12,177 persons. The composition of Marin's population differs significantly from that of the Bay Area where the 2000 population was 58.1% white, 19.5% Asian and Pacific Islander, 7.5% African-American, 9.8% other races, and 4.9% multi-racial.

Persons of Hispanic origin (who can be of any racial group) represented only 4.2% of the population in Marin in 1980 but jumped to 7.8% in 1990 and 11.1% in 2000. In comparison, 19.4% of the Bay Area population was of Hispanic origin in 2000.

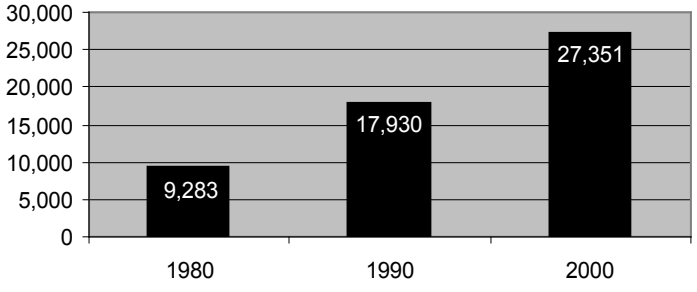
What this means:

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 benefit face greater challenges in affording to live here.

Population Growth and Racial Distribution
1980 - 2000



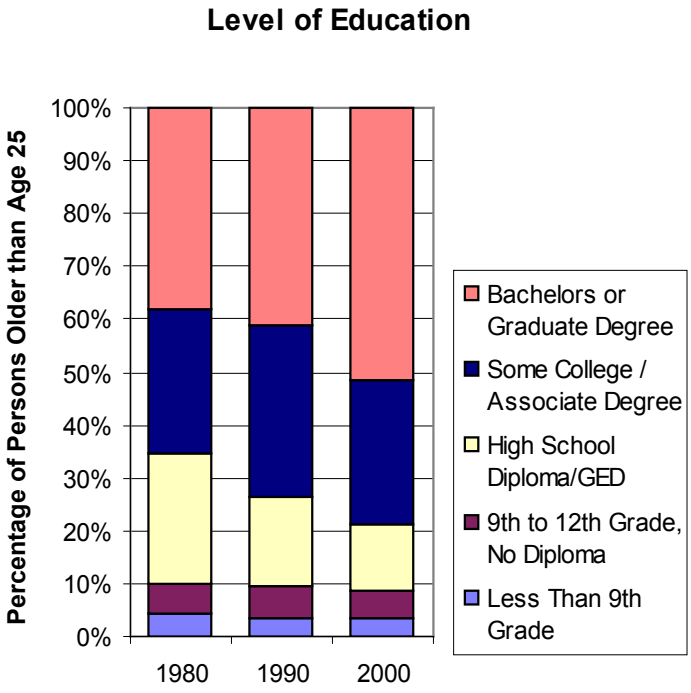
Persons of Hispanic Origin
1980 - 2000



Source: Census

Marin Residents Becoming More Educated

The level of education of Marin residents age 25 and older has increased considerably between 1980 and 2000. The total number of residents with a bachelor's or graduate degree increased from 57,301 (38.3%) in 1980 to 76,322 (41.0%) in 1990 to 94,928 (51.3%) in 2000. The absolute number of persons not completing high school has not changed dramatically from 1980 to 2000, however the percentage has decreased from 10.1% in 1980 to 9.3% in 1990 to 8.7% in 2000. The number of persons receiving a high school diploma or GED certificate without continuing to college has also decreased, from 24.6% in 1980 to 12.4% in 2000. Although 27.0% of the population had either "some college experience/associate degree" in 1980 (previous Census categorical definition), which increased to 32.5% in 1990 and then dropped 5% by 2000, there is only a 0.5% increase since 1980 overall. These decreases have been offset by a substantial increase in persons attaining higher levels of college. In 1970, 26.7% had a bachelor's degree or graduate degree; by 1990 41% had a bachelor's degree or higher. Education data is derived from the decennial U.S. Census for which 2000 is the most recent data.



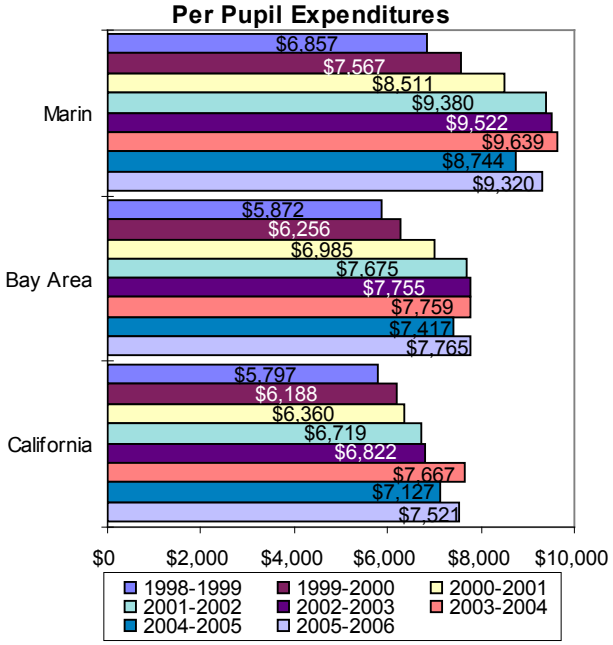
Source: Census

What this means:

Studies have shown that persons with college degrees tend to have higher wage earnings potential than 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 workforce is one influence of 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 requiring college-level education and in services and retail, which typically do not. Jobs requiring college educations can generally be staffed from the local labor pool while jobs that do not have had to increasingly import workers from outside the area.

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

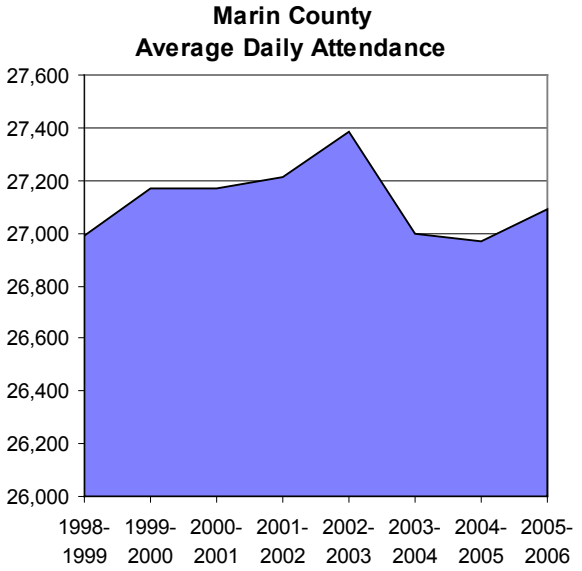
Since 1998, per pupil expenditure in Marin County has exceeded similar per pupil spending compared to the Bay Area and the state. Marin's overall public per-pupil expenditure has increased every year since the 1998-1999 school year and has always remained above the Bay Area and California averages. The per-pupil expenditure was $6,857 during the 1998-1999 school year, $985 above the Bay Area average and $1,060 above the state average. By the 2000-2001 school year Marin's per-pupil expenditure reached $9,380, which was $1,705 above the Bay Area average and $2,661 above the State average. By the 2005-2006 school year, Marin County per-pupil expenditure exceeded both the Bay Area and the state averages by roughly $1,500. Although Marin's overall per-pupil expenditures are high, there are significant deviations from the average, such for Novato Unified, which is consistently closer to the state average, and Sausalito Elementary, which is significantly higher than the Marin average. Average Daily Attendance (ADA) was 26,991 in 1998-99 and 27,383 by 2002-03, an increase of 392 students. Since then ADA slightly decreased to 27,094 in 2005-2006. Average daily attendance is calculated by dividing the total number of days of student attendance by the total number of school days. The resulting value is used to calculate how much funding a school receives from its district, according to the District's funded revenue limit per pupil.



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 for the decline of public education. 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 young people to join 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 either need to be reopened, thus displacing lessee private schools, or other organizations will or students will have to be accommodated at existing campuses. Construction of new schools is challenging at best due to the size of land needed for a school and the lack of available land.

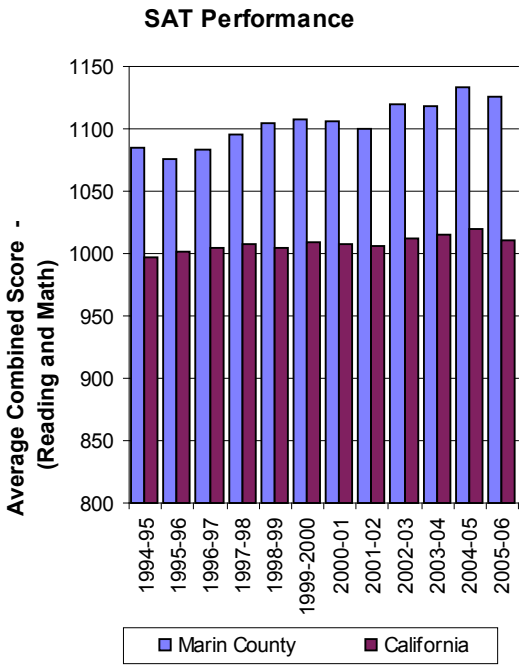


Source: CA Dept. of Education

SAT Scores Continue to Improve and Are Well Above the State Average

Combined Standardized Achievement Test Scores for Marin increased over 41 points between the 1994-95 and 2005-06 school years, from 1085 to 1126, respectively. Combined scores did decrease 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 decreased slightly to 1,126 in 2005-2006.

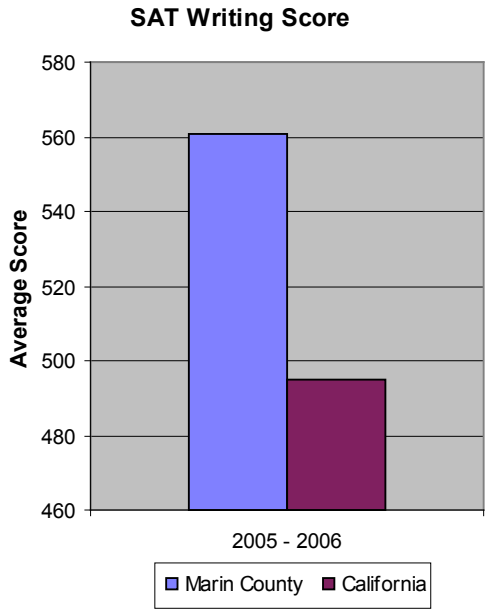
California as a whole has also shown overall improvements in verbal, math, and total scores, up from 997 in 1994-95 to 1,011 in 2005-06. California SAT scores have paralleled Marin's trend line since the 2001-02 school year, while not showing comparable gains in the late 1990's than Marin saw. Although Marin observed a more significant drop in scores than California by the 2001-02 school year, scores remain nearly 11% above the state average. Furthermore, Marin's scores have increased overall 3.7% since 1994-95 while state averages have increased only 1.4% in the same period.



Source: California Department of Education

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 the 200-to-800 scale used previously, however the total possible is now 2400, compared to 1200 previously, due to the addition of the Writing portion.

Marin County students scored an average of 561 on the Writing section (out of 800 possible) during the 2005-06 school year compared to a state average of 495, a difference of 13%.



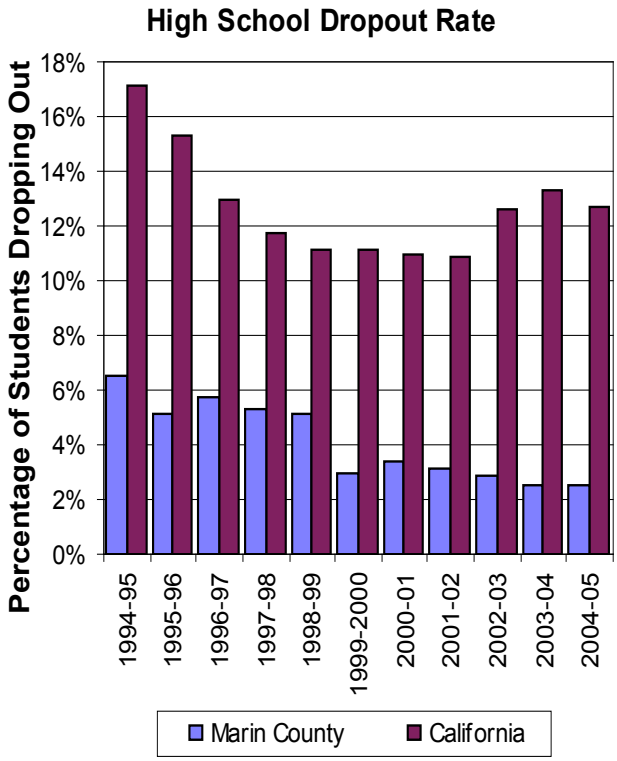
What this means:

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 available and be able 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.

High School Dropout Rate Continues to Decrease and is One-Fourth the State Average

Nearly all students finish high school in Marin: only 2.5% dropped out during the 2004-05 school year, continuing an all-time low established in 2003-04. The dropout rate increased for the first time since 1996-97 in the 2000-2001 school year when it reached 3.4%. The rate was highest in 1994-95 at at 6.5%, and varied between 5.1% and 5.7% through to the 1998-99 school year, after which it dropped significantly to the low-3% range through 2002.

The state as a whole also saw a significant and consistent decrease in the dropout rate, from 17.1% in 1994-95 to 11.1% in 1998-99 and remained around 11% until the 2000-2001 school year. However, the state dropout rate has begun increasing again, up to 12.6% in 2002-03 and 13.3% in 2003-04, a level not seen since 1996-97. While the state rate has begun increasing, Marin County has shown continued declines in student dropout rates. Although the dropout rate for Marin did increase in 2000-01, the state rate has remained at least twice the rate for Marin County over the last ten years.



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.

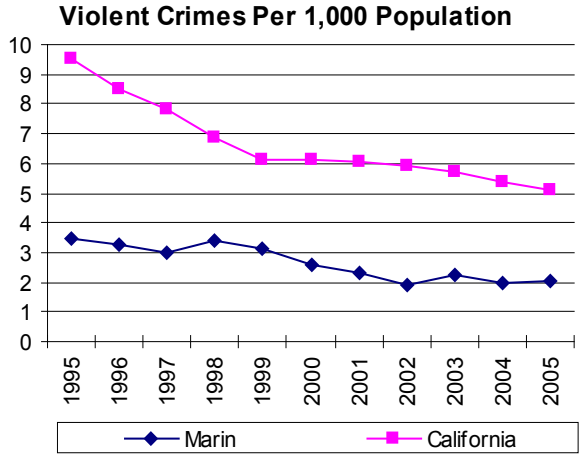
Crime Rates Remain Low But Property Crime Rates More Variable

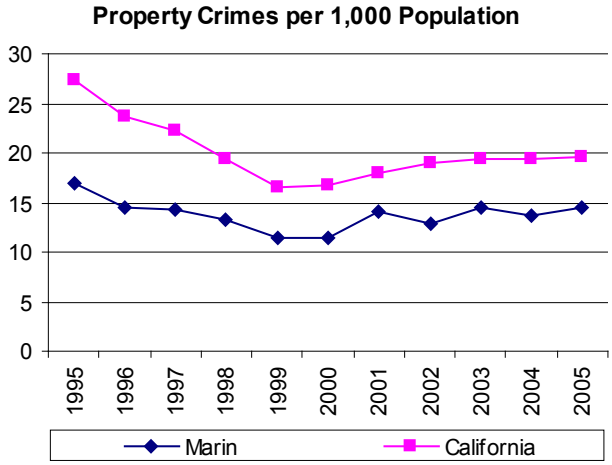
Crime rates in Marin have remained relatively low over the last decade compared with other areas. From 3.4 per 1,000 population in 1995, violent crimes decreased overall to 2.0 per 1,000 population by 2005, although upward spikes occurred in 1998 and 2003. Even in the peak years of Marin's violent crime rate in 1995 and 1998, the county rate has remained two- to three-times lower than the state rate.

In 2003, the State Dept. of Justice included larceny, (theft over $400), in the property crime category to give a more representative depiction of crime in California. The 1995-2002 property crime totals and crime rates were adjusted to reflect the 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 11.5 in 1999. Since then, property crimes over the last six years have seen variable increases, reaching 14.5 in 2005. Marin saw a 22.1% increase in 2001, a slightly larger increase than California experienced in the same year. 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 health of a community. Areas with lower crime rates tend to be more desirable, especially for parents with children. The cost of doing business can also be less due to lower insurance rates and a lesser need for expensive security programs. Crime rates, especially for property crimes, are also affected by the overall health of the local economy.





Source: California Department of Justice

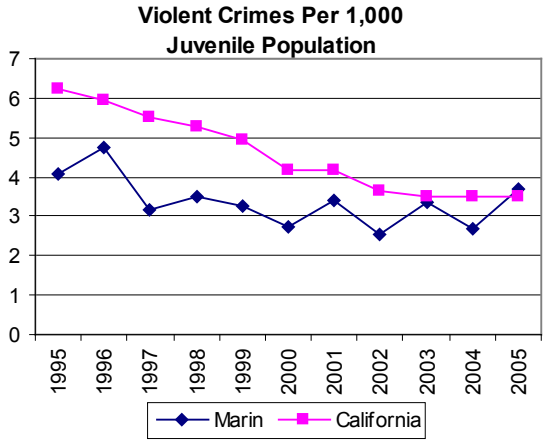
Juvenile Crime Rates Vary, Misdemeanor Rates Higher Than State Average

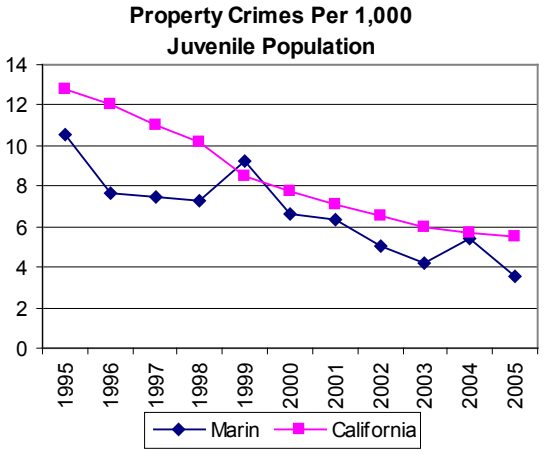
As with adult crime rates, juvenile crimes have generally decreased over time. Juvenile felonious crimes have remained below State levels over time, however juvenile misdemeanors have consistently been nearly double the State's over the past ten years. The gap between the rate of juvenile misdemeanors in Marin County and the State has decreased over time from 39.1% in 1995 to 28.1% in 2005. The majority of crimes by juveniles in Marin County are consistently misdemeanors. Juveniles committed 1,307 misdemeanors in 1995, decreasing to a low of 1,033 in 2001 only to gradually increase to 1,153 in 2004.

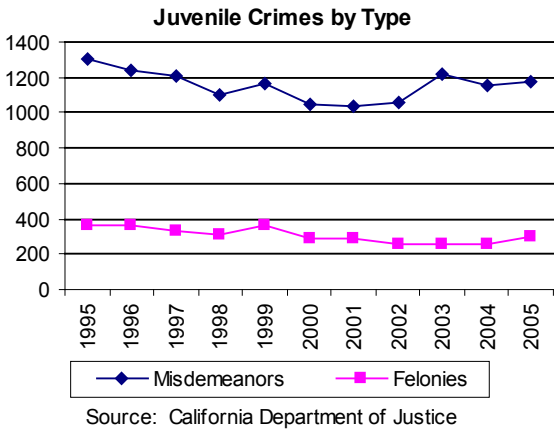
The number of juvenile felonies decreased overall but varied between 1995 and 2005 from a high of 367 in 1995 and dropping to 299 in 2005.

Violent crimes committed by juveniles decreased from 4.1 per 1,000 in 1995 to 2.8 in 2000 before jumping back up to 3.7 per 1,000 in 2005. This is compared to the State rate of 6.2 per 1,000 in 1995 to 3.5 in 2005. Between 2004 and 2005, Marin experienced a 38.5% increase from 2.66 per 1,000 (62) to 3.69 per 1,000 (86) , the highest number since 1996 when 4.76 per 1,000 (or 101) 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 the change. Property crime rates by juveniles have varied for Marin over time, ranging from a high of 10.6 per 1,000 in 1995 to a low of 4.19 in 2003. In 2004, the rate of Marin County juveniles committing property crimes was closer to the period's lowest rate of occurrence rather than the peak. Property crime rates for the County have declined over the period of this study and have reached a record low of 3.56 per 1,000 population.







Source: California Department of Justice

What this means:

Juvenile crime rates tend to be less related to overall health of the economy than adult crime rates. Most juvenile crimes occur during the after school hours, which is indicative of a lack of supervision and/or alternative activities and facilities to minimize idle time. Juveniles who are incarcerated are likely to return to prison as an adult and 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.

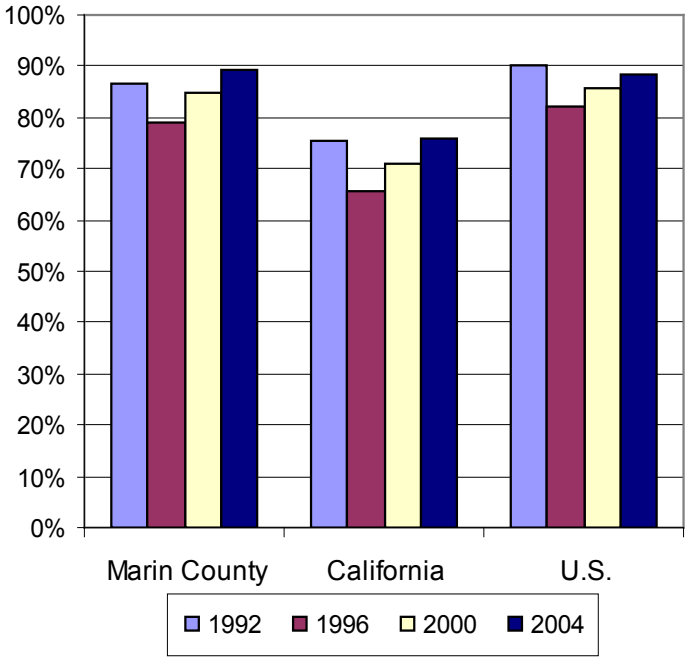
Marin Residents Politically Active

For registered voters, Marin's participation rate was considerably higher than the state level but comparable to the national level in the last four presidential elections. Participation in Marin was highest in 2004 and lowest in 1996, at 89.5% and 79.2%, respectively.

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% to 80%, and the national rate was between 64% and 68%, Marin's rate was a low of 79% in 2000 to a high of 88% in 2004.

While looking at the registered-voter participation rate would indicate Marin's participation is not significantly different than the state or national levels, looking at how many are voting out of how many are eligible to vote reveals that Marin has a much higher overall participation rate.

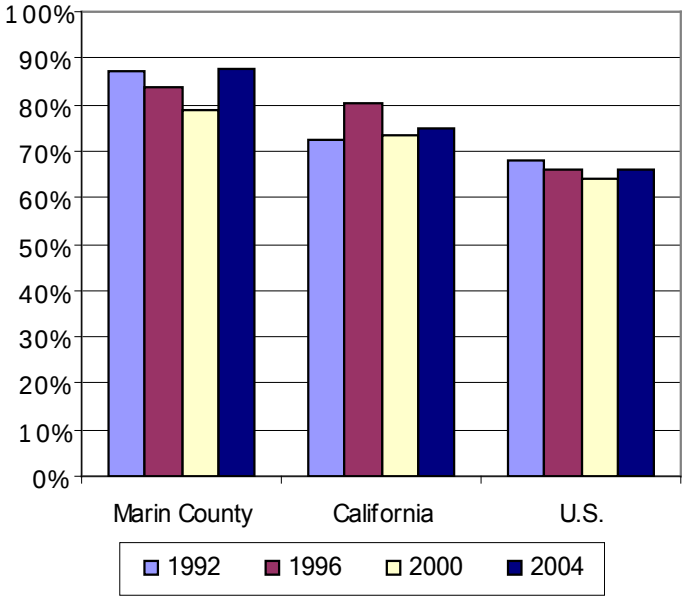
Percentage of Registered Voters Casting Ballots in the General Election



What this means:

Voter turnout rates are indicative of the high level of civic involvement in Marin. While there has been evidence of general disillusionment by the public with politics, the high participation rates confirm that residents of Marin believe in the democratic process and take advantage of opportunities to influence political and social decisions.

Voting Participation as a Share of Those Eligible to Vote



Marin Per Capita Income Highest In Bay Area and California

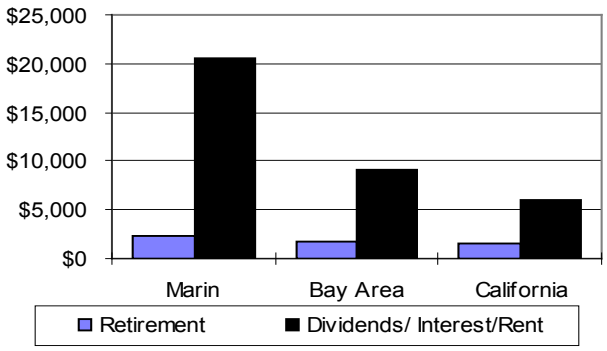
The per capita income of Marin residents was $65,642 in 2003, compared with $45,871 for the Bay Area and $33,415 for California. These are increases from 2001 incomes of $42,903 and $32,655 in the Bay Area and the State, respectively. However, Marin's per capita income saw a slight decrease of $2,393 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 $45,871 in the Bay Area, and $36,963 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 $20,627 compared with $9,103 and $6,055 in 2005, respectively. Retirement compensation was $2,333 for Marin, $1,694 for the Bay Area, and California's at $1,545. Government assistance such as Welfare (Income Maintenance) was only $258 per capita in Marin compared with $477 for the Bay Area and $645 for California. Unemployment Insurance payments were $118 per capita for Marin, $143 for the Bay Area, and $125 for California.

What this means:

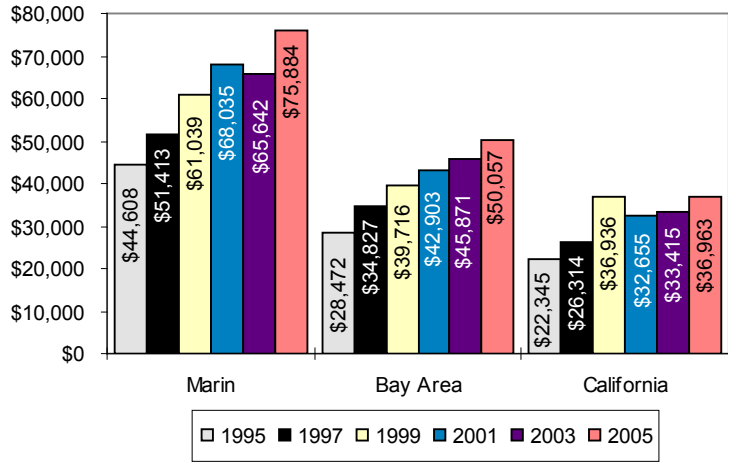
Per capita income is an indicator of relative affluence. High earnings are indicative of well-compensated workers who live in Marin. The high percentage of dividend, interest, and rent income shows that a significant portion of Marin residents' incomes come from sources other than wages while the low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

Per Capita Income from Retirement and Dividends, Interest, and Rent - 2005

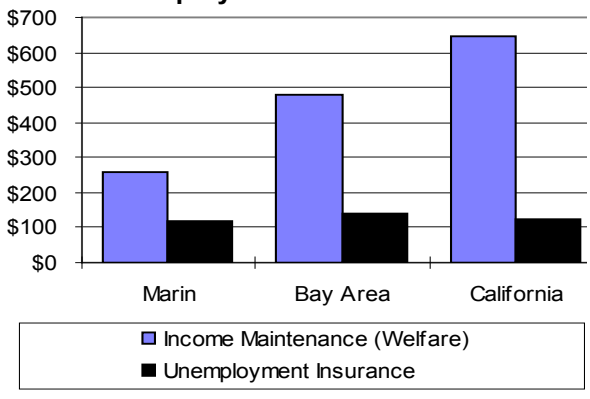


Source: U.S. Department of Commerce

Per Capita Personal Income



Per Capita Income from Government Assistance and Unemployment Insurance - 2005



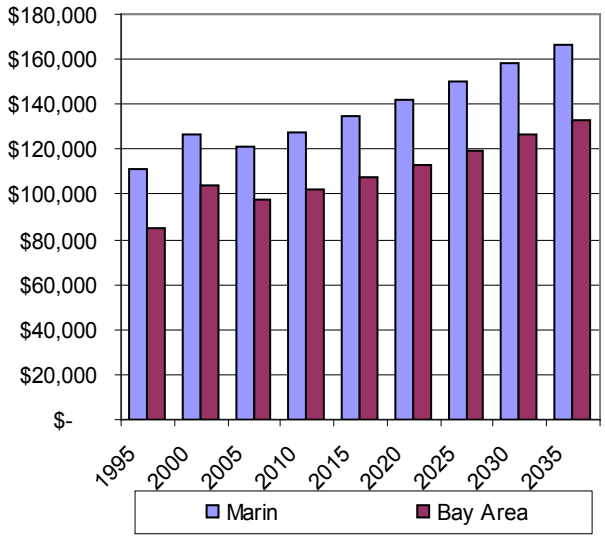
Household Income In Marin Increasing at a Faster Rate than the Bay Area

Household income in Marin County (in constant dollars) increased from $111,050 in 1995 to $121,600 in 2005 and is projected to reach $127,700 in 2010, $158,200 by 2030, and $166,800 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. Over time this difference is projected to increase the income difference between Marin and the Bay Area from $26,050 in 1995, to $24,200 in 2005, to $25,600 in 2010, to $32,000 in 2030, and to $33,700 in 2035.

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.

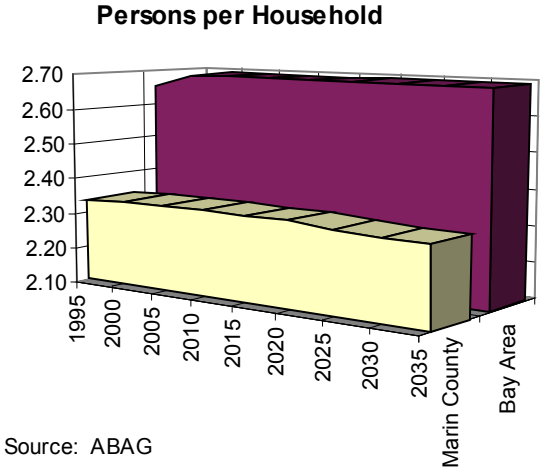
Household Income 1995-2035



Figures are in constant 2000 dollars

Household Occupancy Expected to Remain Relatively Constant Over the Long Term

Household occupancy 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 2.35 persons per household. This is expected to decrease to 2.32 by 2035. Compared with the Bay Area, Marin's household occupancy is significantly lower during the same period, and with the exception of San Francisco is one of the lowest in the Bay Area beginning with 0.32 fewer persons per household in 1995 and having a difference as great as 0.35 in 2005.



Source: ABAG

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 reduces 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.

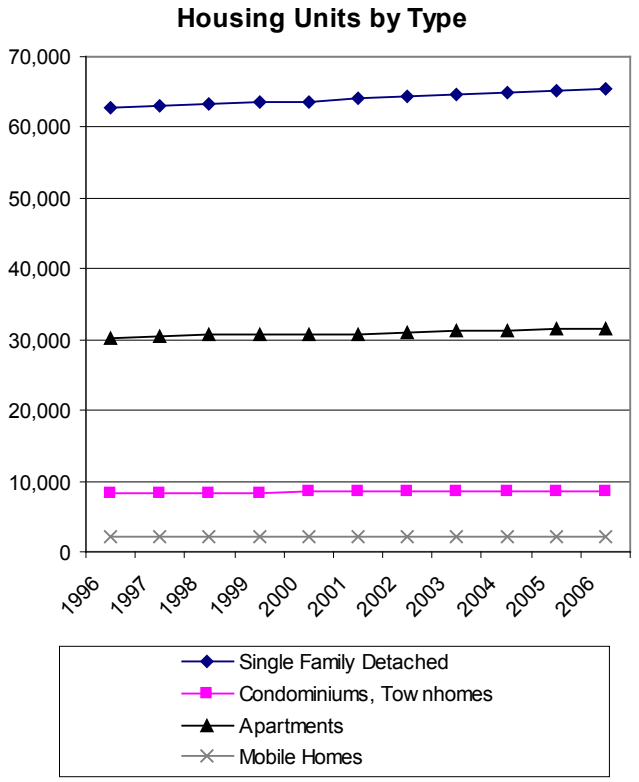
New Housing Units Added Slowly, but Multifamily Share of Housing Stock on the Rise

New housing units in Marin have been added at a slower pace compared to other areas of California. From 1996 to 2006, 4,469 new housing units were constructed. Of these units, 2,830 were single-family detached, 324 were condominiums, and 1,249 were apartments. Fewer than 100 mobile homes have been added to the county's stock since 1996.

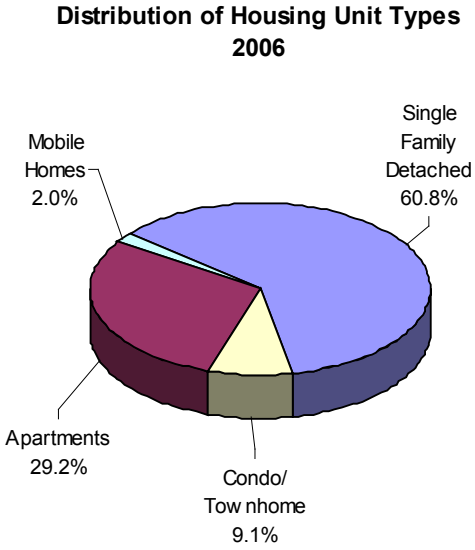
In 2006, detached single-family homes comprised the majority of the total housing stock at 60.8%. Apartments are the next most common housing type at 29.2%, followed by condominiums and town-homes at 9.1%, and mobile homes at only 2%. Over time, the share of detached single family homes, as a percentage of the total housing stock, has slightly increased while there have been minimal changes in the share of apartments and condominiums and town-homes, and no change in the percentage of mobile homes.

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 commensurate 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. However, the rate at which multifamily units are becoming a greater share of the housing stock can lead to greater numbers of affordable units than if new unit construction is predominantly detached single-family units.



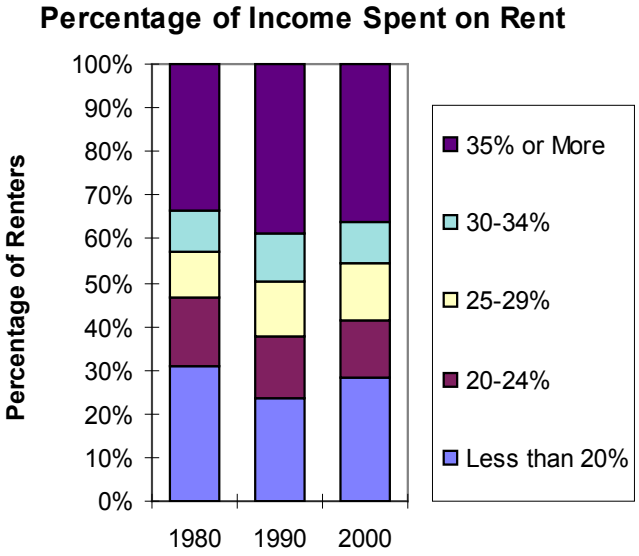
Source: Department of Finance



High Percentage of Income Spent on Rent, New Unit Construction Falls Behind

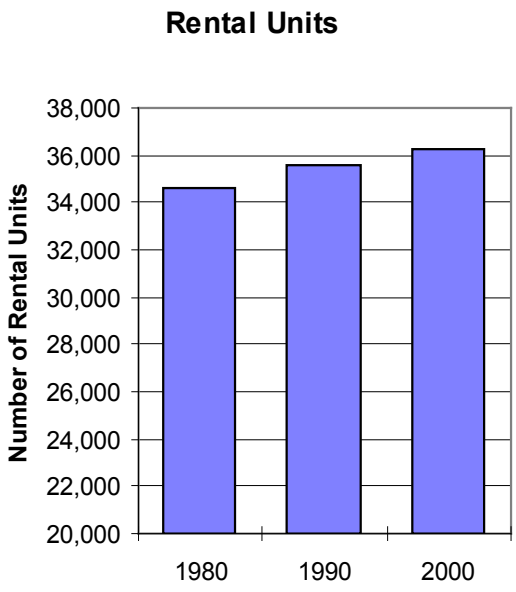
In 1980, over 31% of renters spent at least 35% of their household income on rent. By 1990, persons spending at least 35% of household income on rent increased to 37% and this changed only slightly by 2000 with just fewer than 35% of people spending this amount on rent. In the past Marin has been an 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 increasing again in 2000 to 27%. Over the period, persons paying 20-34% of household income on rent has remained around 35% of all renters, although the distribution within this range has varied. The mean rent was $391 in 1980, increasing to $863 in 1990 and $1,162 in 2000.



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. Persons at the lower end of the economic scale tend to pay a larger portion of their household income 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 very low incomes either need to find subsidized housing, crowd into a unit with other wage earners, or locate outside of 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.



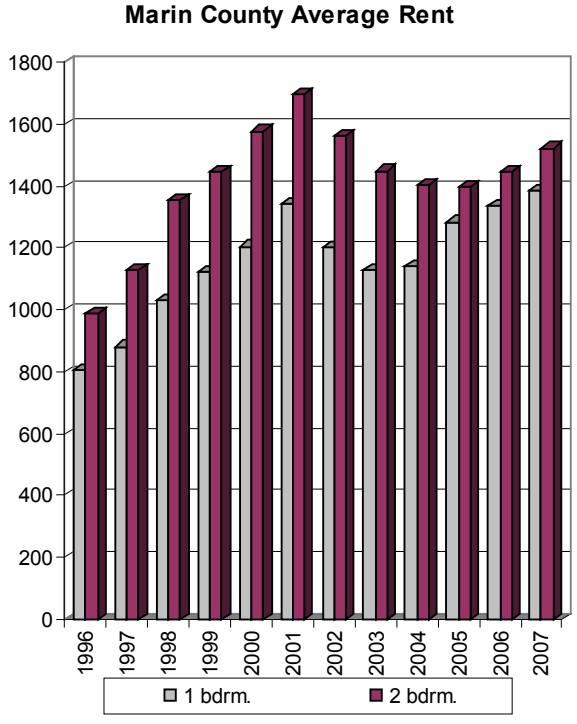
Source: Census of Population

Rental Rates Rebound and Many Still Priced Out of the Market

The average cost of a one-bedroom rental in Marin rose from $807 in 1996 to $1,386 in 2007, a 72% increase in twelve years. The cost decreased slightly in 2002 to $1,204, about equal to the cost of a one-bedroom rental in 2000. As of 2004, one-bedroom units saw 12% decrease in rental price to $1,139 from the 2001 market peak. The cost of a two-bedroom rental increased from $988 in 1996 to $1,523 in 2007, a 54% increase. Similar to one-bedroom rental costs, two-bedroom rents decreased in 2002 to $1,561. By 2004, two-bedroom units saw a 20.8% decrease to $1,405 in rent since the 2001 market peak period. The decrease in rents is due to higher vacancy rates which are attributed to the economic downturn of the early 2000's in tandem with the record-low mortgage interest rates which encouraged many renters to enter the housing market. In 2006 and 2007 rental rates increased for both one- and two-bedroom units, though rates have not returned to levels observed in 2001.

What this means:

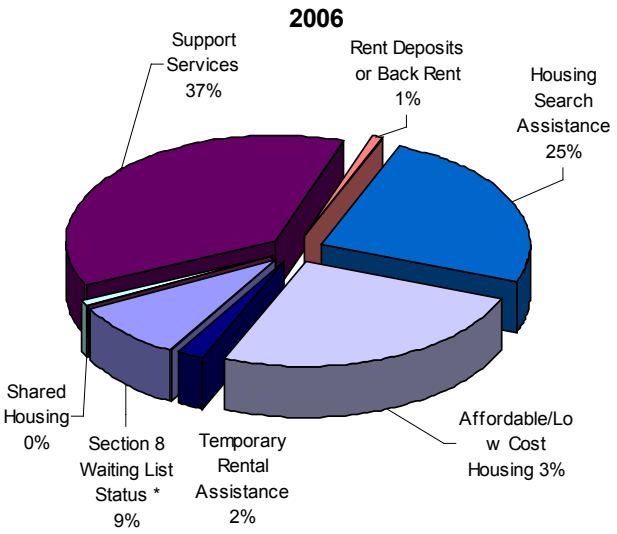
The significant increase in rental rates through the 1990's continues to affect the ability of Marin workers and residents to pay for housing within the county. Even with the decreases seen in the last few years, rents are still high enough that many lower-wage workers cannot afford the mean rent. Disproportionately 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.

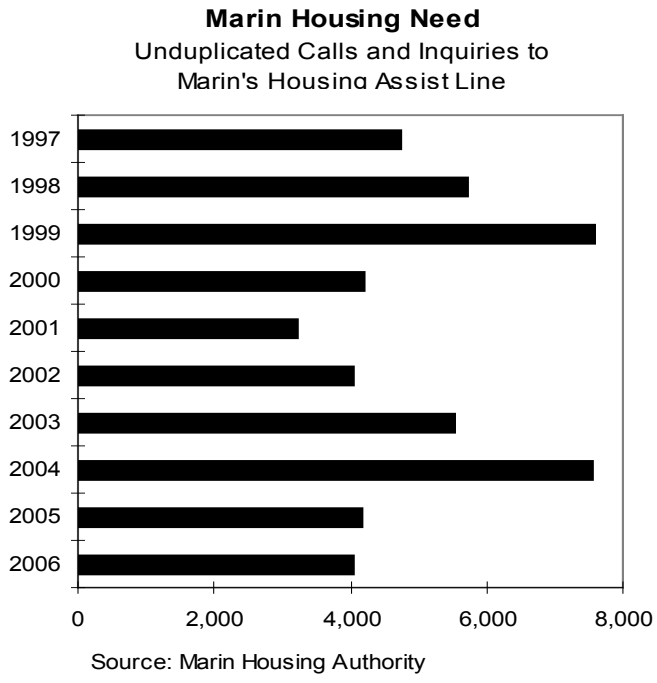


Source: Marin-Sonoma Market Update

Need for Housing Assistance Continues, But Key Areas of Need Shift

The Marin Housing Authority saw a drop from 7,581 calls for assistance in 1999 to 3,214 in 2001. However, calls have dramatically increased by 134% to 7,548 in 2004. In 2005 and 2006 the number of calls was closer to pre-2004 numbers at 4,159 and 4,043, respectively. In 2003, the majority of calls were for housing search assistance. In 2004, the percentages of calls were roughly split between questions on Section 8 Waiting List Status, Support Services, and Housing Search Assistance. The Housing Authority added Temporary Rental Assistance as a category of calls/inquiries 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 due to the large number of families needing this assistance. However, the number of landlords accepting Section 8 subsidized rental applicants as tenants increased from 2003 to 2005. In 2005, the list was opened in support of efforts to provide nationwide assistance to survivors of Hurricane Katrina. Calls made in regard to the Section 8 program are mostly from families checking the status of the waiting list. Generally, the Section 8 waiting list is five years long. Other calls are made for assistance with rental deposits or back rent, shared housing, landlord-tenant issues, general support services, and temporary rental assistance.





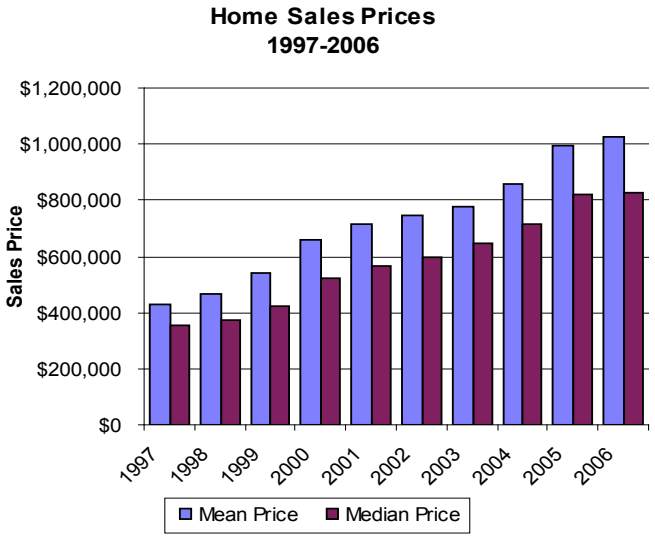
Source: Marin Housing Authority

What this means:

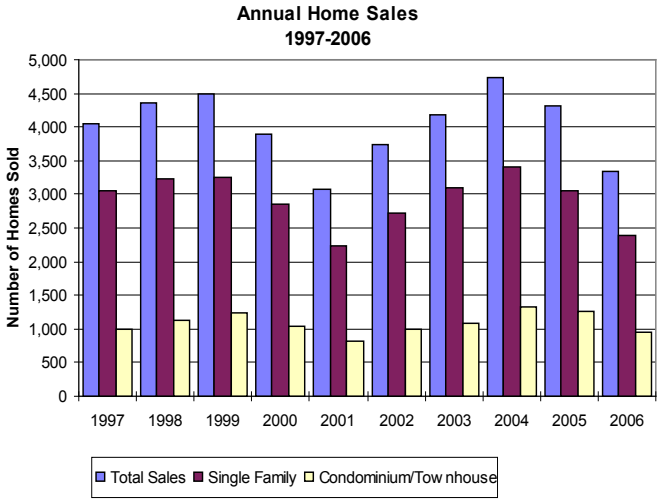
The need for housing assistance continues, given the significant rise in home costs for both rental and ownership. As housing costs rise, families are spending a larger percentage of their monthly income on rent or mortgage payments. While HUD calculates appropriate affordability levels based on one-third 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 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 that lower income households still require supplemental assistance to afford rent. The result of the ongoing housing shortage, specifically affordable housing, is an increased burden on government and non-profit organizations, and longer waiting lists for housing assistance.

Home Sales Prices Continue to Climb While Overall Sales Bounce Back

Overall median home sales price increased from $352,000 in 1997 to $1,023,786 in 2006, nearly a three-fold increase over a nine-year period. The mean living area of homes sold varied over the period, from a low of 1,763 square feet in 2002, to a high of 1,913 square feet in 2005, and down to 1,886 square feet in 2006. Median single-family home prices increased 140%, from $400,000 in 1997 to $960,000 in 2006. In addition median condominium and townhouse prices increased 133%, from $224,000 to $521,895 in the same period. The mean single family price over this period increased from $88,911 to $248,703 above the median price. For condominiums and townhouses, the difference between the mean price and the median price in 2006 was $35,370.



The number of sales rebounded in 2002 after a two-year decline even though housing prices continued to increase such that the number of sales in 2004 surpassed the high set in 1999. 2001 saw the fewest number single-family sales at only 2,239. Annual sales were in excess of 2,800 units through 2000, and in 2002 began annual increases to reach 3,405 units in 2004 but decreased to 2,400 units in 2006. In 1997, 990 condominium and townhouses exchanged hands, which peaked in 2004 at 1,338 sales, and then dropped to 945 sales in 2006. Similar to sales of single-family homes, this number also dropped sharply in 2000 and 2001, rising again in 2002 with 1,000 units sold, and climbing to a high of 1,338 sales in 2004. A severe dip in sales of both single family houses, condominiums, and townhouses occurred in 2005, but have since began to show signs of recovery in 2006 as sales have started to rise to previous levels.



Source: Marin County Assessor

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 preclude home ownership for many. Periods of economic downturn usually affect lower-end sales more than high-end sales because wealthier homebuyers tend to be less affected by economic downturns. However, over the past two years the lower end of the market has remained strong while the high end of the market has not seen less of a buying frenzy, possible due to a smaller pool of wealthy buyers. Record low interest rates and alternative lending formulas and practices have given the opportunity for many first-time buyers to enter the market and enabled others to move up into larger housing units.

Significant differences in the mean versus median price are caused by an uneven distribution of the number 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.

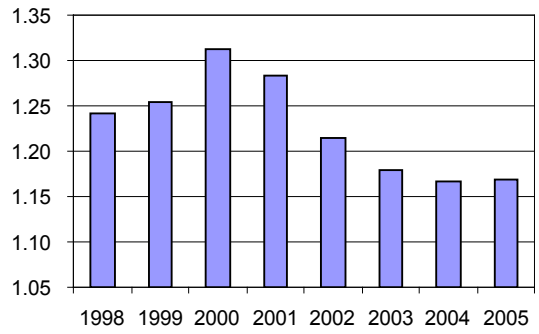
Housing Construction Lags Job Creation

The number of employed residents increased from 129,700 in 1998 to a high of 137,700 in 2001, the peak of the economic boom. Since then the number decreased each year, dropping to 125,600 in 2005. Meanwhile, the number of jobs in Marin increased from 106,700 in 1998 to 109,200 in 2005, down slightly from the 2001 peak of 113,900. This is an increase of 2,500 or 2.3%. By contrast, the number of housing units increased from 104,420 in 1998 to 107,482 in 2005. This was an increase of only 3,062 units or 2.9%.

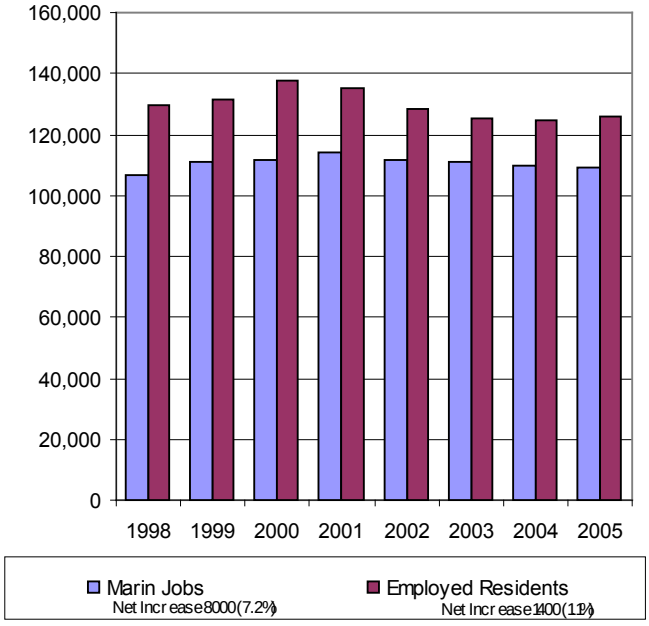
There was an estimated 1.24 employed residents per housing unit in Marin in 1998, increasing to 1.31 in 2000, then dropped to 1.17 employed residents per housing unit in 2005. Even assuming the 2000 peak level of 1.31 employed residents per household; an additional 6,706 housing units should have been constructed during this period to keep pace with employment growth. At the lower end of 1.17 employed residents per household, the deficit grows to 1,718 units.

While the creation of new jobs has historically outpaced the creation of new housing units, the jobs per housing unit factor which, when applied to Marin's housing inventory, would initially indicate that Marin actually needs to add more jobs than housing units to achieve balance. However, Marin also provides housing for communities with more jobs than housing, most notably San Francisco. So while a jobs-housing balance is being approached internally to Marin, external factors have actually resulted in Marin falling even farther behind in providing housing for its local workforce.

Employed Residents per Household



Marin Jobs - Workers Balance



Sources: Employment Development Department, Labor Market Information Div.

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 rate greater than what would be necessary due to employment growth within the county.

Per Capita, Total Vehicle Miles Traveled on the Rise

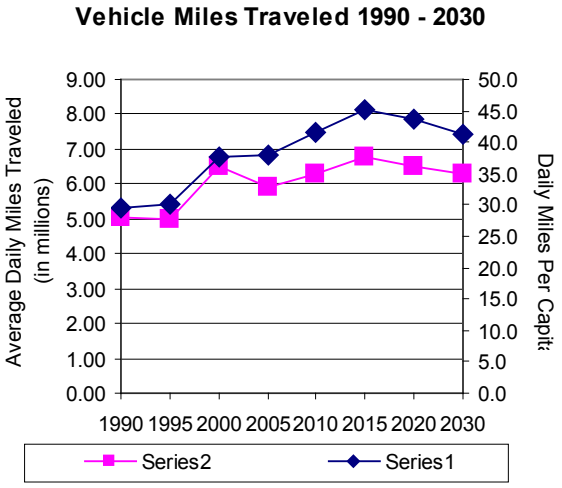
Total vehicle miles traveled on a daily basis increased 28.2% between 1990 and 2005. Average daily miles traveled in 1990 were 5.3 million increasing to 5.4 million in 1995, and then leveling off at, 6.8 million miles in 2000 and 2005. During the same period, the driving age population (age 16+) was 190,611 in 1990, 195,392 in 1995, and 187,563 in 2000. Between 2010 and 2020 the total miles traveled is expected to increase from 7.5 million to 7.9 million.

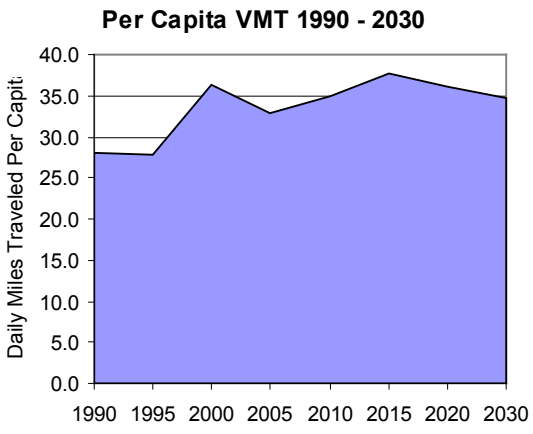
The increases in driving age population somewhat offset the increases in total miles traveled. However, per capita miles have increased and are expected to continue increasing substantially. Average daily miles traveled per capita was around 28 miles in 1990 and 1995 and 36.3 miles in 2000 which then declined to 32.9 miles by 2005. Per capita miles are forecast to rise again between 2010 and 2020, from 35.1 to 36.1 daily miles. In 2030 however there is a projected decrease in Total Travel from 36.1 in 2020 to 34.8 in 2030.

What this means:

Vehicle miles traveled is an indicator of traffic circulation and travel trends. While increases in total miles traveled are to be expected with increases in population, the increase in per capita miles traveled indicates that people are driving more, whether it be longer commutes, more solo drivers, running errands, shuttling kids around, or increased commercial traffic.

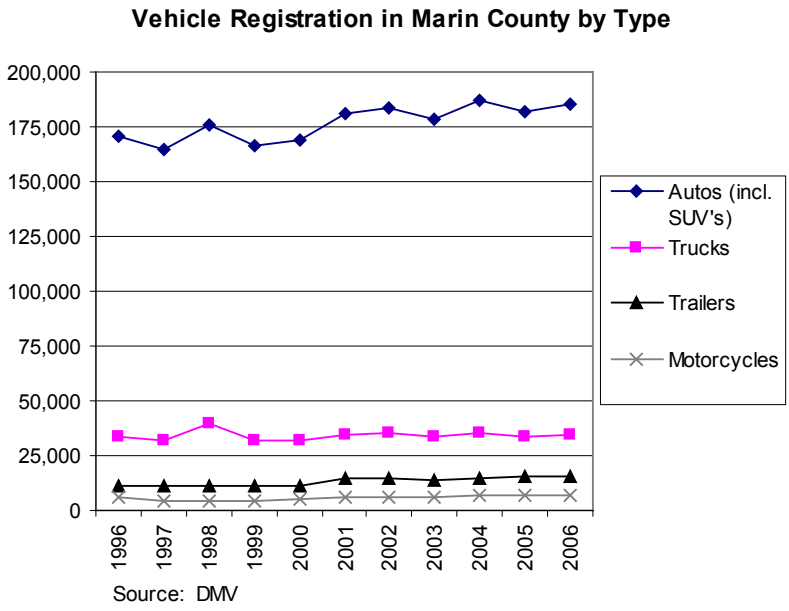
The substantial increases in vehicle miles in Marin does not bode well for getting around within the county. The limited number of circulation improvements that can be constructed without massive right-of-way acquisition and the increasingly intense competition for outside transportation funds means that Marin's road network will not see significant increases in capacity. The HOV expansion projects in San Rafael and north of Novato on Highway 101 will improve lane capacity on the freeway, but many of Marin's traffic problems are on surface streets. Increased congestion will result in continued escalation of delay and congestion costs and corresponding decreases in quality of life and attractiveness to businesses. 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.





Source: Metropolitan Transportation Commission

Vehicles Resistered in Marin Increasing and Outnumber Driving Age Population



The overall number of registered vehicles in Marin has varied significantly, from a low of 212,258 in 1997 increasing greatly to 225,648 in 1998 and then dropping again in 1999 to 214,087. From 2000 to 2005 the County experienced a 12% increase in the number of registered vehicles, bringing the total to a peak of 242,478. Auto registrations, which includes SUV's, took a dip in 1997 and again in 1999 dropping below 170,000. Since then the number of autos has steadily increased, aside from a small dip in 2003 and 2005, to 185,444 in 2005. The number of registered trucks, which in Marin are almost all pickups, dipped slightly in 1997 to 32,032 from 34,041 in 1996 but then peaked at 39,869 in 1998. The number of registered trucks subsequently decreased to 31,693 in 1999 before increasing to 35,130 in 2002 and 35,179 in 2004. In 2005 there were a reported 34,400 trucks, a 2.2% decrease from 2004. The number of motorcycles declined by nearly 800 between 1996 and 2000 to 4,896 but has since risen to 6,928 in 2005. Meanwhile, the number of trailers has increased gradually from around 11,200 in 1996 to 15,706 in 2005.

What this means:

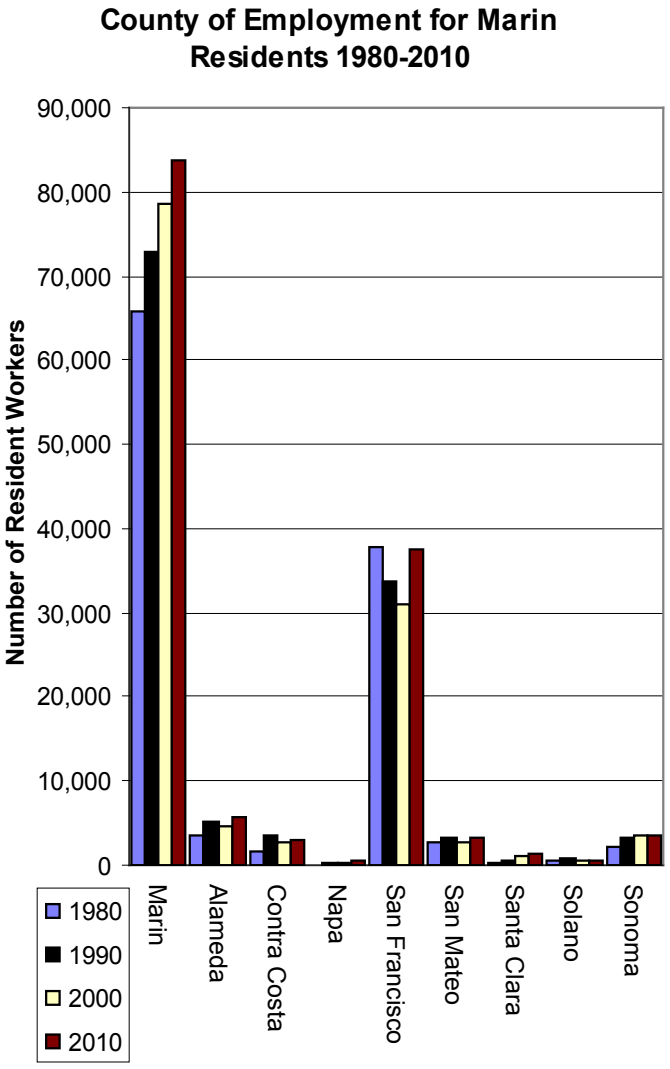
Increased vehicle registrations mean potential for more vehicles on the road and, by extension, increased congestion. With just over 200,000 driving age persons and over 243,000 registered motorized vehicles, there are far more vehicles than drivers. These additional vehicles must be stored somewhere and the increase in vehicles has resulted in many parking conflicts, especially in older, denser neighborhoods that were not laid out 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.
Marin Employee: A person whose place of employment is in Marin County.

Historical data is derived from 1980, 1990, and 2000 Census. Projections for 2010 are derived from Metropolitan Transportation Commission report County-to-County Commuting in the San Francisco Bay Area, 1960-2030 which is modeled on Census 2000 Journey to Work figures and Association of Bay Area Governments Projections.

The number of jobs in Marin increased by 20,585 between 1980 and 1990 and increased another 17,697 by 2000. 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 1.03 in 2000. This is reflected in a 9.2% increase in the number of Marin resident workers, while the number of Marin employees increased 45.8% during the same period. The number of jobs in Marin is expected to increase between 2000 to 2010 by 8.7%. This would result in a ratio of Marin resident workers to the number of jobs of 1.06% in 2010, reversing the trend experienced between 1980 and 2000. 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.

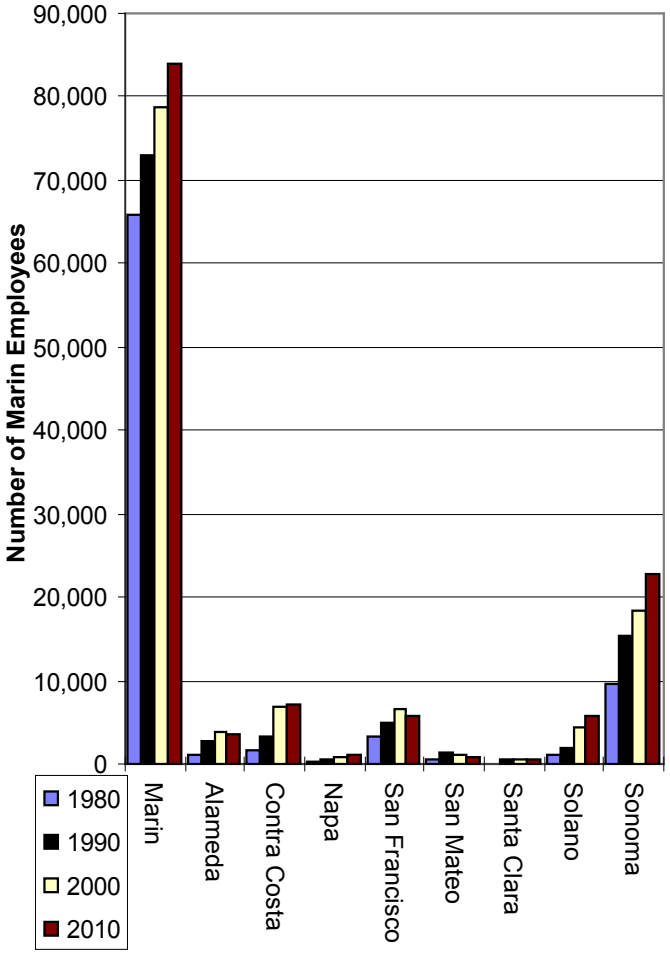


The number of Marin resident workers who also work in Marin has increased from 57% in 1980 to 63% in 2000 but is expected to decrease to 60% by 2010. San Francisco remains the largest out-commute destination for 24.7% of Marin resident workers in 2000 but in 1980, 32% were employed in San Francisco. By 2010, that rate is expected to increase again to 26.9%. Commuting to Alameda, Contra Costa, Sonoma, and San Mateo Counties increased considerably, from 8% of all Marin out-commuters in 1980 to 10.5% in 2000 and an expected 12.7% in 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. Workers commuting in from San Francisco have nearly doubled since 1980, increasing from 3,332 (4%) in 1980 to 6,450 (5%) in 2000. In-commutes by Alameda, Contra Costa, and Solano County residents also increased, from 5% to 12% 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. Because housing costs are also high in San Francisco, Marin experiences through-commutes from workers living in outlying areas going to jobs there.

County of Residence for Persons Working in Marin 1980 - 2010



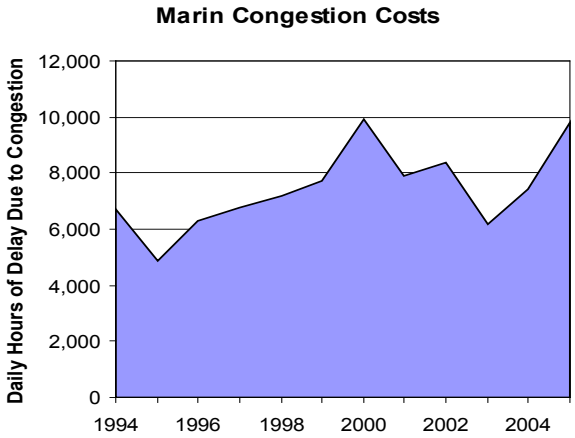
Sources: Census and Metropolitan Transportation Commission

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 more vehicle traffic and demands on transportation networks. Without expansion of transportation systems, traffic congestion worsens, commute times increase, and air quality decreases. The amount of traffic on Highway 101, Marin's main artery, has continued to increase while improvements to the highway and public transit has 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 need. Meanwhile, local citizens continue to resist the development of additional housing, affordable or otherwise, which would provide additional options for current Marin employees who in-commute.

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 2000-2003 coincides with the subsequent downturn in the economy, which indicates fewer vehicles on the road during peak commute periods. Based on the MTC/ CalTrans report entitled "Bay Area Transportation: State of the System 2006", Marin County now has two of the Bay Area's 10 worst congestion locations list for 2005: the afternoon drive from Mill Valley to San Rafael on U.S. 101 and the U.S. 101 southbound commute between Highway 37 and Interstate 580. Countywide, a 32 percent surge in congestion occurred in 2005. The southbound commute has consistently been on the Top 10 list, however, the northbound direction has made a significant jump to the list from its average #20 spot to #9.



* No data available for 1997, averaged for 1996 and 1998

Source: Caltrans District 4, Office of Highway Operations

Greater levels of delay are a reflection of increased commute distances because of insufficient affordable housing locally, especially for lower income workers. Additionally, residual congestion from normal rush hour patterns, in conjunction with workers altering their work schedules to avoid the traditional "rush hour", have resulted in extended commute periods and increased hours of delay. Contributing factors to increased congestion also includes delays in Highway 101 improvements, increased through-commuting from outlying areas to San Francisco and the East Bay, and students being shuttled to school in private vehicles.

What this means:

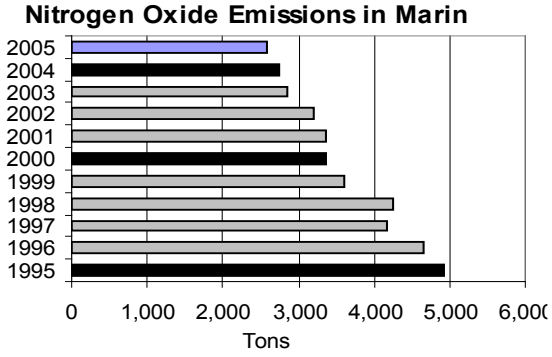
Congestion costs impact the economy through loss of daily productive hours. The impact is most significant for businesses that rely on transportation of goods and services during the business day. In addition, increased hours spent on the road commuting to and from work can result in lowered on the job 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:

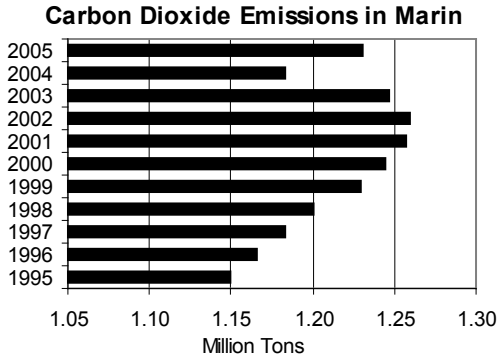
Congestion is defined as a condition where the average speed drops below 35 mph for 15 minutes or more on a typical weekday. The congestion data, calculated by Caltrans, is recurrent (everyday rush-hour stop & go conditions due to demand exceeding capacity) and does not include non-recurrent congestion (caused by holidays, special events, incidents, maintenance work or construction activities where normal capacity is temporarily reduced).

Vehicle Emission Levels Show Substantial Improvement, But Carbon Dioxide is Up

In Marin County, from 1995 to 2005 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 46%, from 46,900 tons per year in 1995 to 25,043 tons in 2005, although there was a slight increase in 1998. Nitrogen Oxide (NOx) emissions also decreased during the period by 33%, from 6,465 tons in 1995 to 4,296 tons in 2005. Hydrocarbon emissions decreased 48%, from 4,922 tons in 1995 to 2573 tons in 2005. However, carbon dioxide emissions rose from 1.17 million tons in 1995 to the 2002 high of 1.26 million tons. Carbon dioxide emissions then decreased in 2003 and 2004, down to 1.18 million tons before rising to 1.23 million tons in 2005.

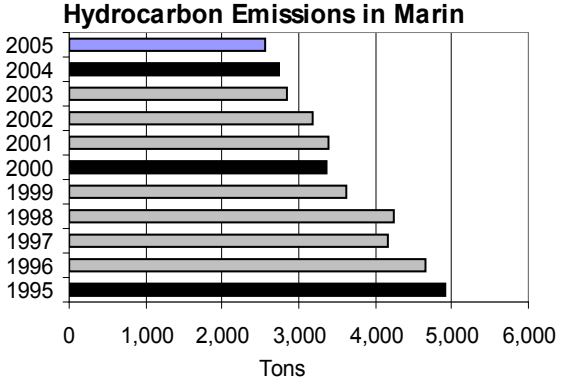


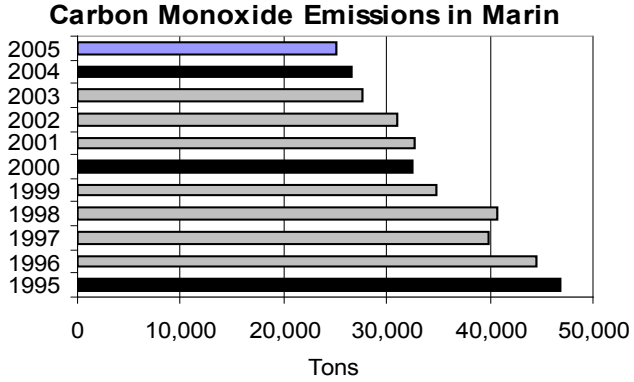
The U.S. Environmental Protection Agency calculates air emissions based on the number of vehicles registered in a region, not based on vehicle miles traveled. For this reason, some data irregularities may exist. The fuel consumption chart demonstrates that even when the number of vehicles registered 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 has increases. Carbon dioxide emissions are not affected by emission control systems and are therefore more reflective of driving habits and vehicle choices.



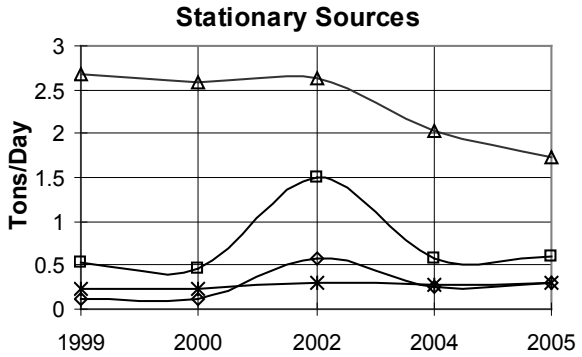


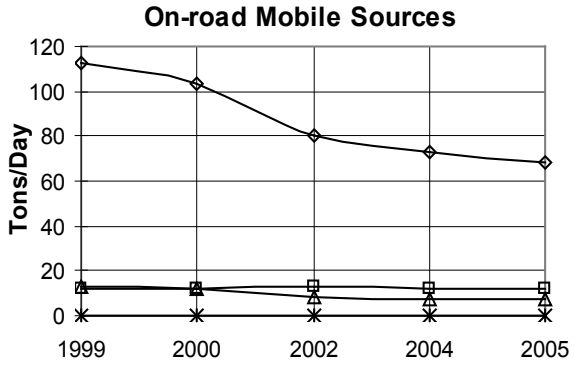
Vehicles Account for Vast Majority of Airborne Pollutant Sources in Marin

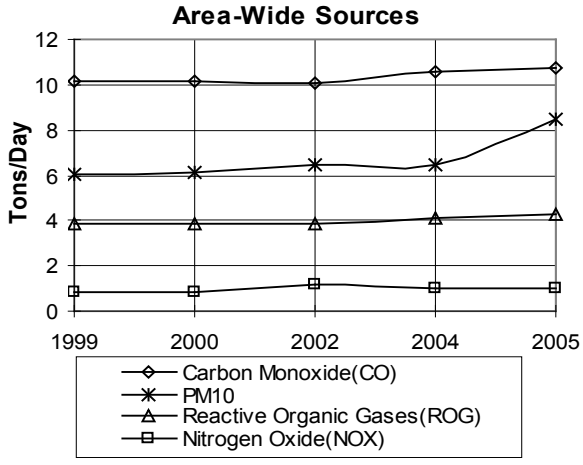
The Air Quality indicator gives a picture of Marin County's pollution by source of emission over time by referencing levels of Carbon Monoxide (CO), Particulate Matter 10 (PM10), Reactive Organic Gases (ROG), and Nitrogen Oxide (NOx). The most important aspect of this indicator to note which emission is prominent in each of the four source categories. For Stationary Sources (i.e., industrial facilities), the highest emission is ROG, while NOx is the most active, both 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; with all but NOx showing a slight incline since 2002. On-Road Mobile Sources (i.e., autos, trucks, motorcycles) are the predominant producers of Carbon Monoxide, although showing a notable decline since 1999 along with ROG (which includes and represents Hydrocarbons). Other-Mobile Sources (i.e., airplanes and railways), are also major contributors to CO emission showing a rise toward 1999 levels.

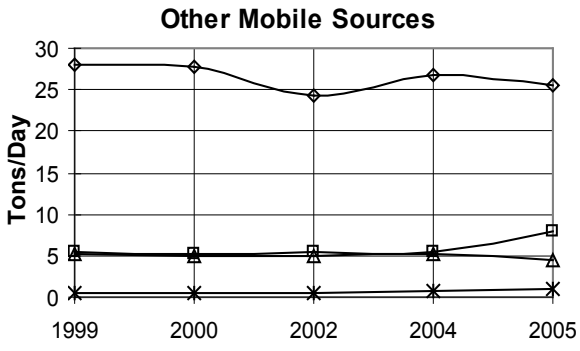
What this means:

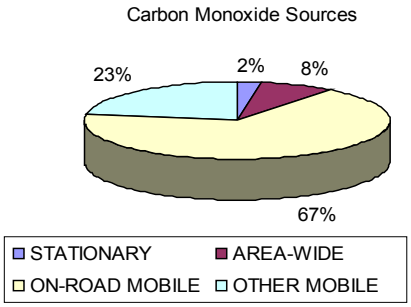
Much of the air pollution in Marin County has consistently come from On-Road Mobile Sources (vehicles) over time. The Bay Area Air Quality Management District (BAAQMD) has reported that Marin has good air quality, measured by the least number of days in excess of air quality standards. Although air quality in Marin is reported as good, primarily because of prevailing winds that blow 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 burning of wood for heating which would offset the benefits achieved through increased emission controls on other

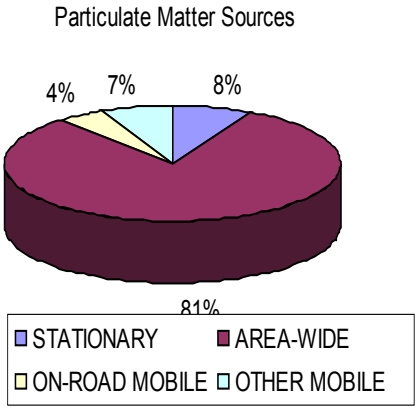








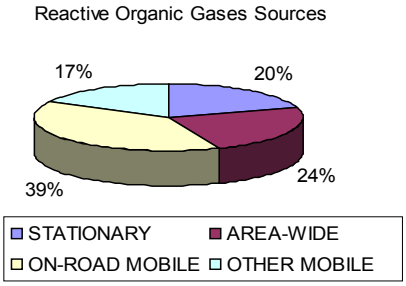




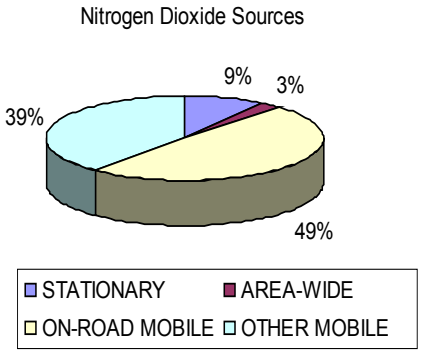
pollution sources.

Below are descriptions of monitored key air pollutants:

CO (Carbon Monoxide): A colorless, odorless gas resulting from the incomplete combustion of fossil fuels. Over 80% 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 APCD 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. NO 2 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.

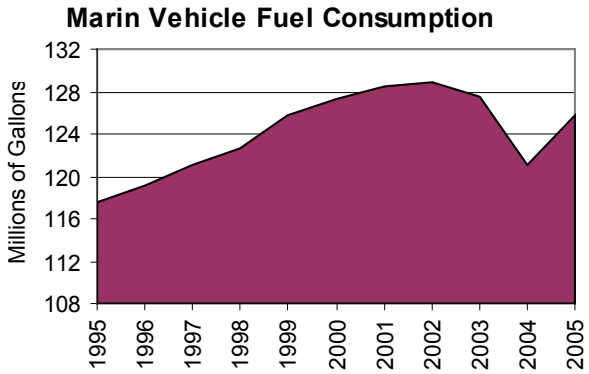
Total Fuel Consumption Is Increasing,

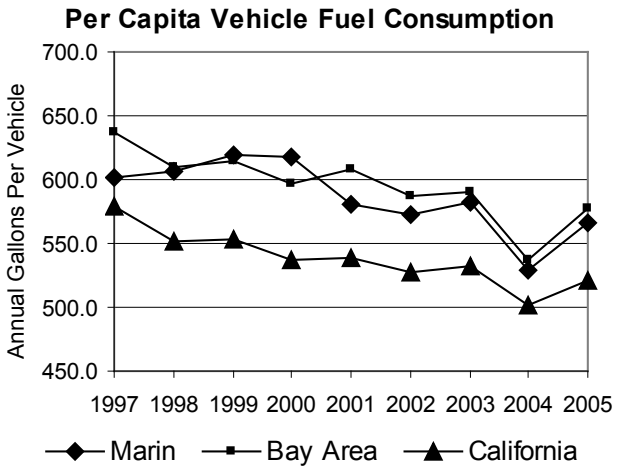
From 1994 to 2005 fuel consumption increased by 6.7% from 117.9 million gallons to 125.8 million gallons annually. Fuel consumption grew steadily until 2002, reaching a peak of 128.8 million gallons. In 2003 consumption decreased, dropping dramatically to a level not seen since 1997 at 121 million gallons in 2004. However, consumption jumped back up to 125.8 million gallons, a 4% increase from the previous year.

Annual consumption per vehicle in Marin increased overall between 1996 and 2000, from 566.2 to 618.4 gallons per vehicle. Per vehicle consumption levels dropped to 583 gallons in 2003, reaching the lowest level since 1994 at 529 gallons per vehicle per year in 2004. In 2005, however, consumption per vehicle rose to 565.4 gallons, a 6.7% increase from the previous year. Marin's per-vehicle consumption levels tended to be less than those for the Bay Area but higher than for 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.

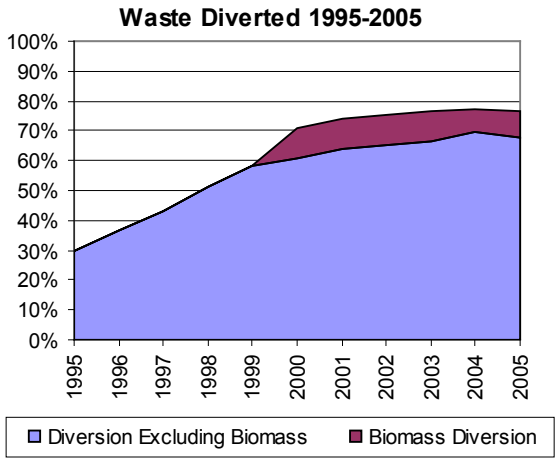




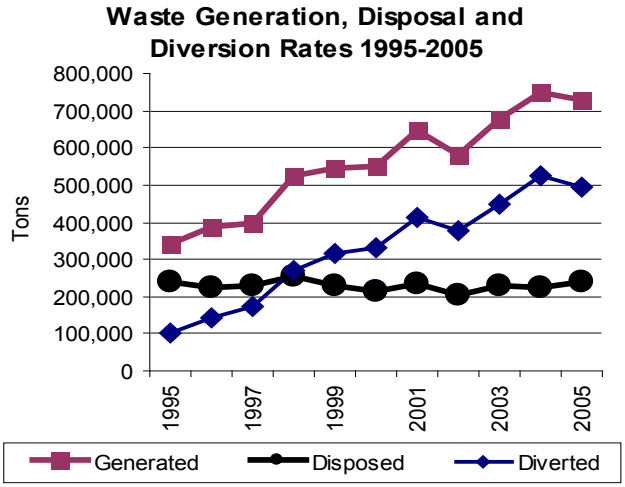
Sources: Caltrans Transportation and Planning Program, DMV

Marin Waste Diversions Far Exceed Disposal, But Generation Rate is Up

From 1995 to 2005 waste generation in Marin increased 110%, from 342,852 tons annually to 731,181 tons. While generation rates decreased to 580,865 tons in 2002, rates rebounded sharply in 2003 and 2004 before declining once again in 2005. At the same time, the tonnage diverted (recycled) increased from 30% to 68% of the waste stream, a remarkable 387% improvement. The significant increases in diversion have absorbed the additional tonnage generated while the tonnage disposed of over the study period has remained relatively consistent, averaging nearly 229,439 tons annually.



Marin County was one of the few counties in the state that met the provisions of Assembly Bill 939 which required diversion of at least 50% of waste by 2000, with Marin having recycled 61% of the county's waste in 2000 and 68% in 2005. Beginning in 2000, biomass diversion (mainly scrap wood from construction debris and tree removal) has resulted in an additional 10% of the waste stream being diverted, effectively increasing Marin's diversion rate to 76% in 2003. In 2004 the amount of biomass diversion dropped to 7% and then increased to 8.7% in 2005. In 2005 76.5% of the total waste was diverted (recycled) instead of disposed of.



Source: Marin County Hazardous and Solid Waste Management

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 inactive and no longer receives solid waste. Marin disposed of 92% of its waste at Redwood Landfill in 2004, and imported nearly 181,000 tons from other counties while exporting over 57,000 tons. Waste imports and exports have fluctuated considerably, and since a nearly threefold jump occurred in 1999, exports have ranged from 23,485 tons in 2002 to 57,090 tons in 2004 while imports have ranged from 170,269 tons in 2003 to 198,510 tons in 2000.

All eight waste haulers in the county operate residential recycling programs and collect glass, paper (cardboard, junk mail, newspaper), tin and aluminum cans, and plastic (#1 and 2), and 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 has done a tremendous job recognizing this by increasing the amount of waste diverted from landfills and recycled to other uses. 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.

The amount of waste imported from other regions could ultimately affect Marin's ability to dispose of its own waste. In addition, the transportation distances required for inter-county disposal increase vehicle emissions.

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

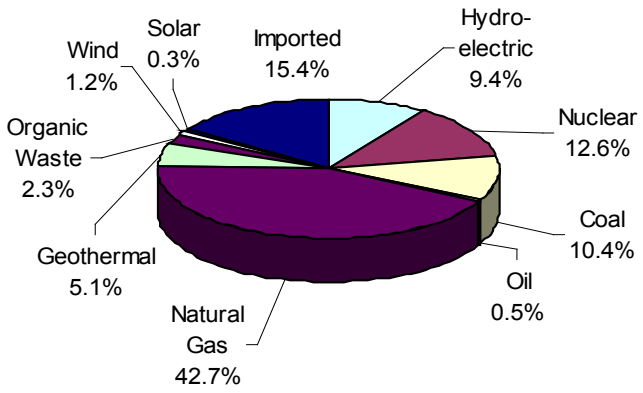
In 2001 the statewide energy mix consisted of 42.7% gas, 12.6% nuclear, 9.4% hydroelectric, 10.4% coal, 5.1% geothermal, 2.3% organic waste, and less than two percent of oil, wind, and solar for electricity generation. While the amount of imported energy has increased from 15.4% in 2001 to 23.1% in 2002, the amount has declined slightly each year to 21.7% in 2005.

Sources in 2005 were 33.4% gas, 12.55% nuclear, 13.85% hydroelectric, 9.77% coal, 5% geothermal, 2.0% organic waste, and less than two percent of oil, wind, and solar with 21.7% imported.

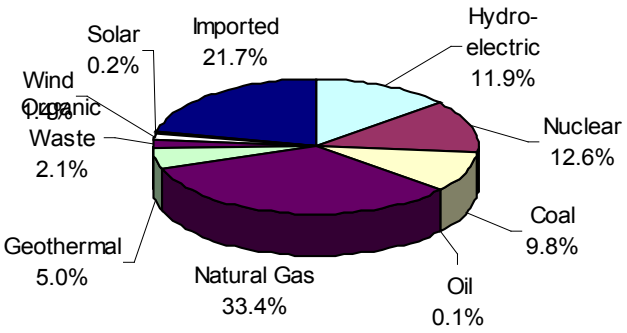
Renewable Energy in the Power Mix

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 reaching 28.8% in 2005. 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 renewables because the burning that takes place to create energy creates air emissions that impact the environment. Small hydroelectric energy is renewable, but in some cases large hydroelectric is not because of the impact large dams have on the life of streams and rivers. While the energy crisis of 2001 generated considerable interest in renewable energy sources, the vast majority of generation capacity that has come on line or is under construction will use natural gas, albeit with much greater efficiency than older gas plants.

2001 Energy Generation by Source

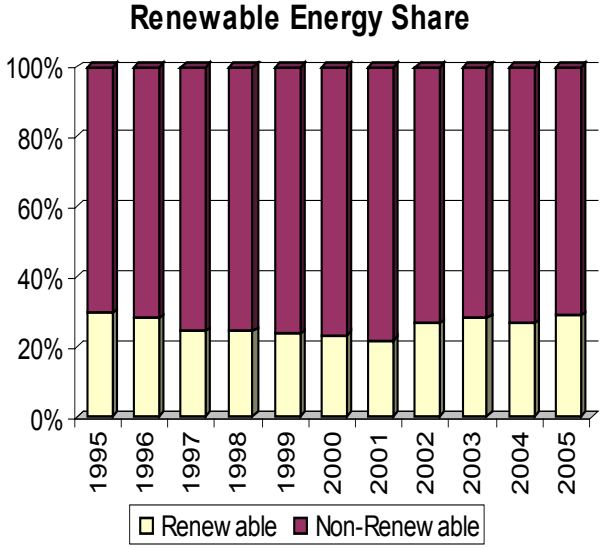


2005 Energy Generation by Source



What this means:

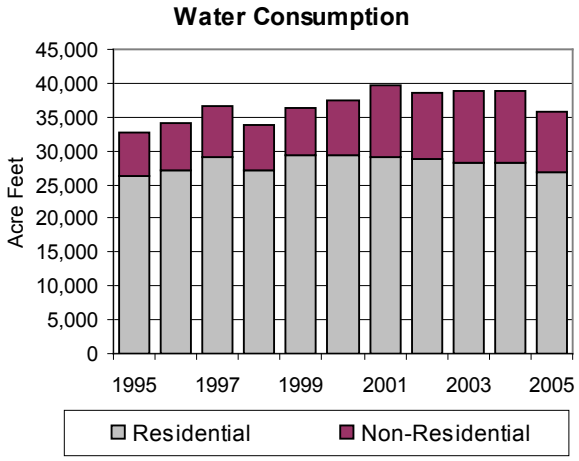
Increasing our reliance on renewable sources of energy while decreasing our reliance on non-renewable sources will have a beneficial impact on the environment. This is because we can reduce the impact of fossil fuels that are removed from the earth's crust and emitted into our air, soil and water. In 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 nonrenewable 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.

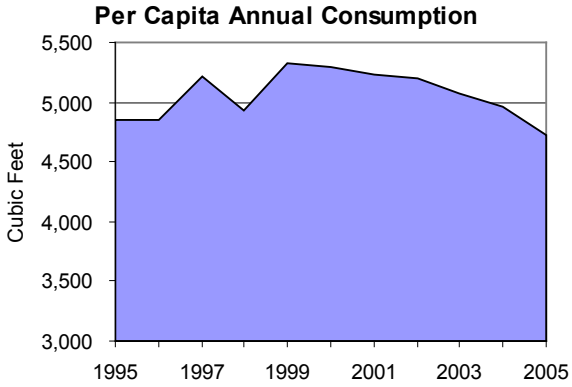


Source: California Energy Commission

Residential Per Capita Water Consumption Declining, Non-Residential Use Increasing

Total water consumption has increased overall since the mid-1990s, even factoring a modest population increase. Decreases in consumption occurred in 1998 and 2002 but crept upward every other year. Residential consumption rates increased from a low of 26,147 acre feet in 1995 to a high of 29,477 in 1999. Since then, residential consumption has gradually decreased, sinking to 28,154 acre feet in 2004. However, nonresidential consumption has increased at a greater rate overall. Although nonresidential consumption been more variable, it increased 63% overall, from 6,541 acre feet in 1995 to 10,690 acre feet in 2003. Per capita consumption rates varied considerably during the 1990's but after peaking at 5,325 cubic feet in 1999, have gradually decreased to 4,718 by 2005, a 11.3% decrease.





Sources: Marin Municipal and North Marin Water Districts

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. Conservation efforts have been intense in light of Marin's limited sources for water. Capacity at the seven MMWD reservoirs have remained the same as well as Stafford Lake, one of the NMWD sources. Contracts exist with the Sonoma County Water Agency to deliver additional water however, the current pipeline does not have additional capacity and a new pipeline approved by voters in 1992 has not been constructed. A desalination demonstration project is now being evaluated by MMWD as a means to provide additional supply. Even with strong conservation measures in place, residential per capita usage increased 25% between 1993 and 2002 before retreating in 2003, 2004, and 2005.

What this means:

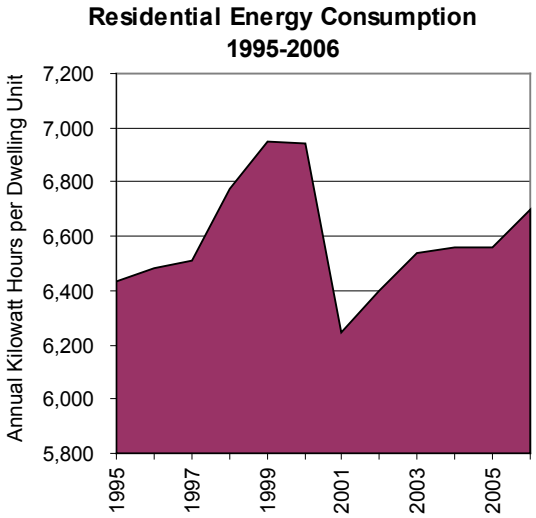
Conservation efforts in the early 1990's were successful at limiting water usage. Low flow showerheads and toilets are saving water and saving residents money. However, a substantial amount of water is used for irrigation, agriculture, and other industries. Conserving water means that there is more available during dry years, and for the streams that feed Marin's coastal environments and San Francisco Bay. However, significant increases in per capita use threaten the ability of Marin County to sustain itself on water collected locally and increases the need to import water from elsewhere or look at alternatives such as desalination.

NMWD gets roughly 75% of its water from the Russian River, and MMWD 25%. This means that Marin residents are using some water that does not originate in the county's watersheds. It is likely that a drought in Marin would also result in drought conditions in the Russian River watershed so Marin could again experience mandated rationing if a sustained drought period occurs and a larger-scale desalination project is determined to be infeasible.

Energy Crisis Has Tempering Effect, But Long-Term Consumption Rates Increase

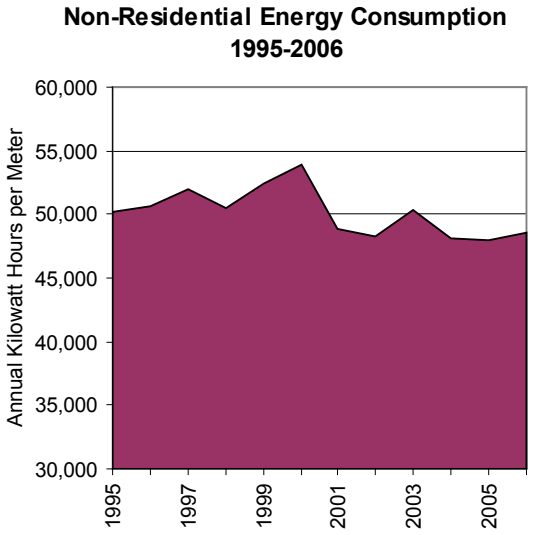
Residential:

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 at 6,940 kWh annually by 2000. Total consumption increased 13.1% from 1995 to 2000, from 627 million kWh to 709 million kWh. The per capita rate increased 9.1% in the same period. However, the energy crisis of 2001 with its attendant price increases and conservation incentives reduced per capita consumption 10%, to 6,244 kWh, the lowest during the period. However, since the emergency conservation efforts of 2001, energy consumption increased 7.3% as of 2006, to 6,700 kWh, although this is still 3.5% less than the highest per capita consumption in 1999.



Non-Residential:

Non-residential energy consumption followed similar patterns as Residential, increasing from 50,137 kWh per meter in 1995 to 53,853 kWh per meter in 2000, a 7.7% increase. Total consumption increased from 671 million kWh to 768 million kWh during the same period 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 140 kWh. This suggests that although more people are buying energy, energy conservation is increasing.



Source: California Energy Commission

What This Means:

Residents in Marin County used increasing amounts of energy than in previous years. Increased consumption during this period may partially be the result of relatively cheap energy costs because of the 10% legislated reduction in rates. However, the 2001 energy crisis clearly had an impact on consumption levels for both residents and businesses through a combination of increased rates and incentives for substantial conservation.

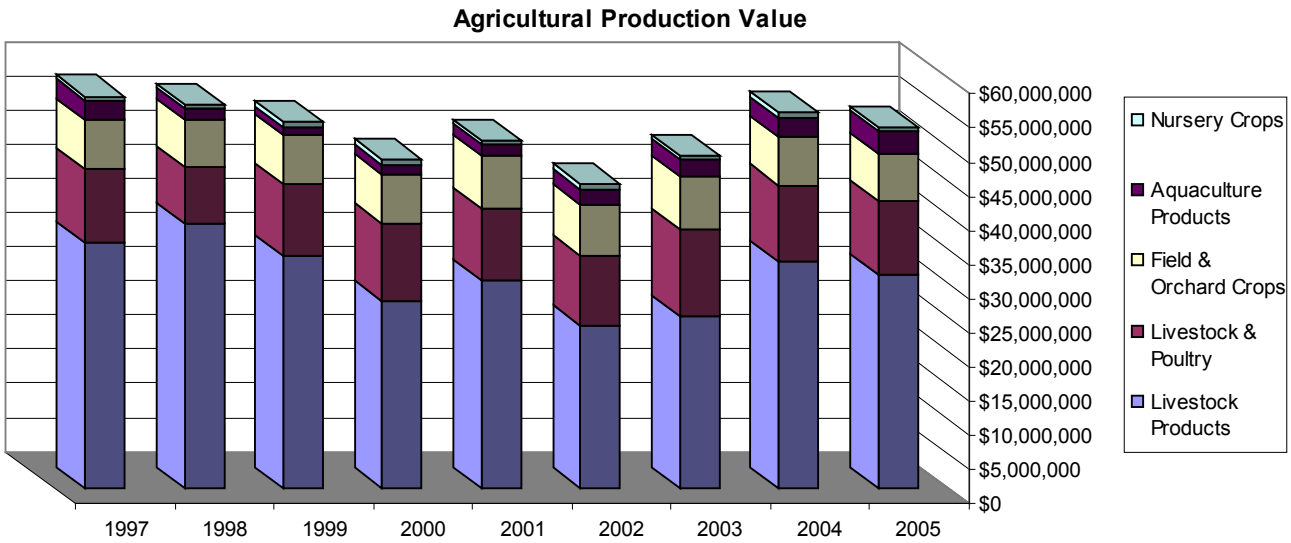
Also playing a factor are weather patterns. While Marin has a relatively temperate climate, unusually cold winters or warm summers can increase energy consumption. Whatever the reason, the effects of increased consumption are not positive. Because the energy Marin County consumes is based primarily on non-renewable resources, increased energy consumption results in increased air, soil, and water pollution.

Agriculture Production Declines Overall, But Is In Recovery

The production value of agricultural products has decreased from $57.3 million in 1997 to 52.8 million in 2005. However it is important to note the rebound from 2002 to 2004 ($10 million) after a significant dip from 1997 to 2002 (approx. $13 million). Livestock Products, which includes milk and dairy, continue to be the leading agricultural products in Marin. The value of milk and dairy production 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 $10,000,000 mark since its lowest point in 1998 ($8,330,921). Field and orchard crop values have remained relatively stable in ranging from the low to mid $7 millions per year from 1997 to 2005, peaking at $7.66 million in 2001. The total value of nursery crops has fluctuated since 1997 peaking at $813,686 (33% increase) in 2000, with a downturn of 15% from 2000 to 2005. Aquaculture had production value of $3.0 million in 1997, dropping 50% in 1998 and gradually recovering such that by 2004 it was approximately 5% below its peak value. In 2005 the value of aquaculture products breached the three million dollar mark for the first time since 1997, setting a new record high of $3,264,910 in 2005.

What this means:

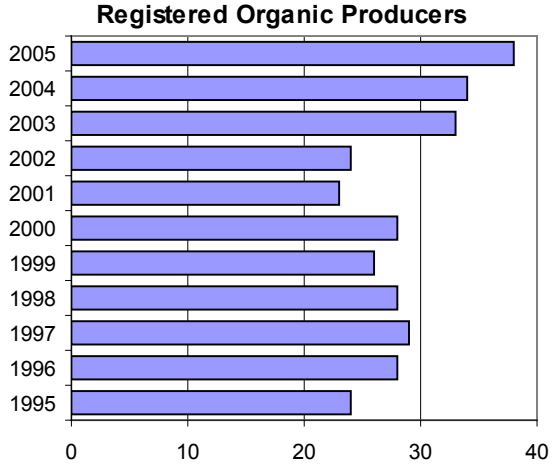
Agriculture is an important component of Marin County, utilizing over one-third of the county's land area. While Marin's soils are not prime for the purposes of raising field crops, sufficient grazing lands for both livestock and dairy operations allow these important aspects of the economy to function. Agriculture is clearly affected by environmental factors, competition from corporate agriculture, increasing production costs, supply and demand, and severe weather periods, which affect output and revenue which in turn affect agricultural viability. Additionally, regulatory and permit processes along with generational 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.

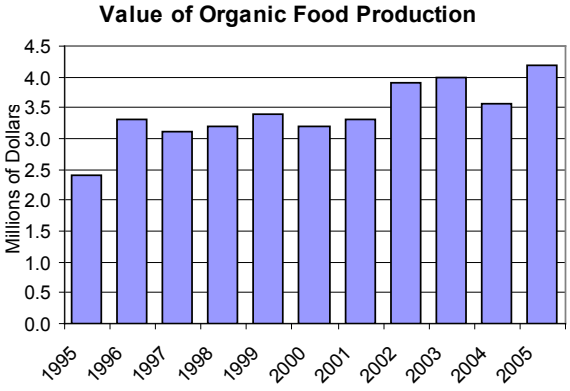


Source: Marin County Department of Agriculture, Weights and Measures

Significant Organic Production Gains, But Production Value Not Keeping Pace

The number of acres of land devoted to organic production has grown from 124 acres in 1995 to 11,300 acres in 2005, an increase of over 1,300%. From 1995 to 2001 this increased significantly to 810 acres. The number of registered organic growers hovered in the mid-20's between 1995 and 2002, when it jumped to 33 in 2003 and 38 in 2005. 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 $3.9 million in 2002. 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 risen to a new high of $4.2 million in 2005, reflecting an increase in production resulting from the substantial increase in acreage.

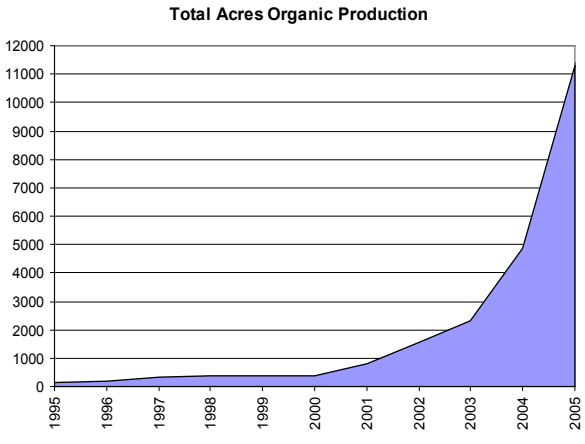




Source: Marin County Department of Agriculture

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 environment 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.

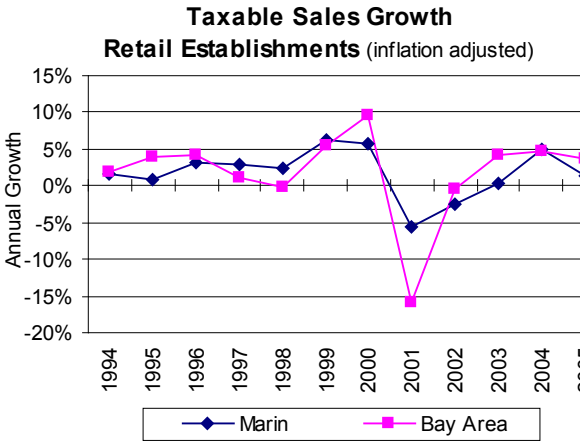


Organic production creates diversity among the products available to residents of Marin County. The goods generated by organic farms offer healthy choices and an alternative to mass produced or chemically treated foods. Also, organic production is an optimal way of protecting the environment while still meeting the County's goal of preserving agricultural land in order to increase community food security.

Taxable Sales Growth Follows Economic Trends, But Marin Less Volatile Than Bay Area

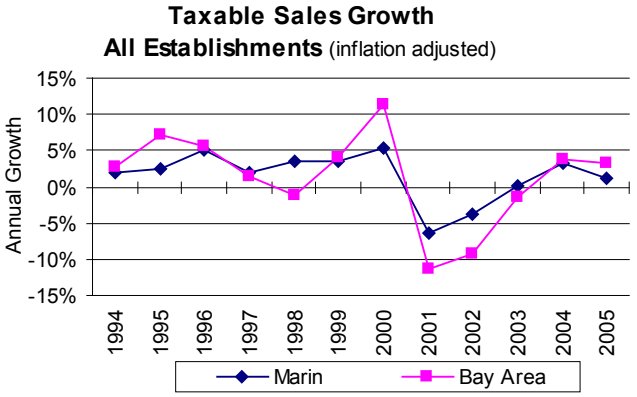
Retail Establishments:

Per capita retail sales in Marin increased 61.9% between 1994 and 2005, from $7,920 to $12,819, a net increase of 30% when adjusted for inflation. Per capita retail sales in the Bay Area increased by 28.9% after inflation during the same period and saw a much more significant drop between 2000 and 2001. Between 2000 and 2002, annual per capita spending in Marin decreased by $376 while for the Bay Area it decreased $1,211. Taxable retail sales in Marin were $1.88 billion in 1994, $2.90 billion in 2003, $2.96 billion in 2000, and peaked at $3.16 billion in 2005. This represents an increase of 68.4% (36.5% after inflation) through 2005. There were 2,988 retail establishments with average annual sales of $629,117 in 1994; this increased to 4,237 establishments in 2005 with sales averaging $747,166. While the number of establishments has increased every year except 1996, sales per establishment peaked in 2000 at $871,110. After inflation, sales per establishment increased 18.8% over the period.



All Establishments:

Per capita sales for all establishments in Marin increased 56.3% between 1994 and 2005, from $10,806 to $16,891, a 24.42% increase after inflation. For the Bay Area, per capita sales increased 18.52% (after inflation) during the same period. Total taxable sales in Marin were $2.56 billion in 1994 and $4.17 billion in 2005. This is an increase of 62.7% (30.8% after inflation). There were 12,059 establishments in Marin with average annual sales of $212,673 in 1994 and 11,138 establishments with average sales of $374,524 in 2005. Unlike retail establishments, when all establishments are included, Marin's sales per establishment grew 76.1% while the number of establishments declined over the period. As with retail establishments, total sales and per capita sales both declined in the early 2000's: Marin's per capita sales were off by 10.3% over a two-year decline while the Bay Area saw a three-year decline of 23.2%.



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. 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 additional sales tax revenue which helps fund 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 in another, which results in additional tax revenue for the other jurisdiction. 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 outside the county, but leakage within the county from one city to another could be potentially significant.

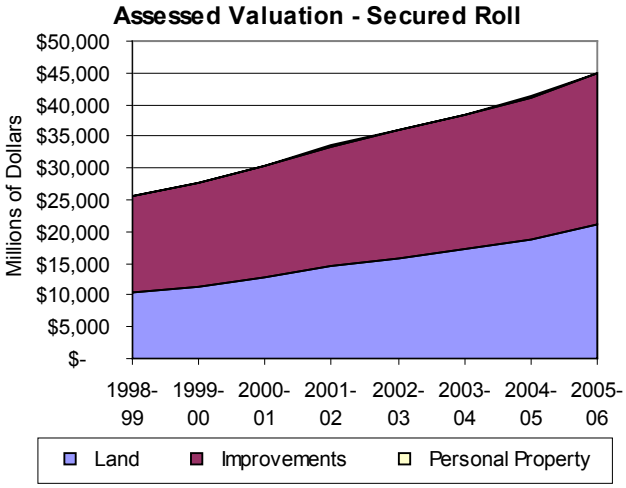
Assessed Valuation Increases Sharply, Even with Proposition 13 Cap

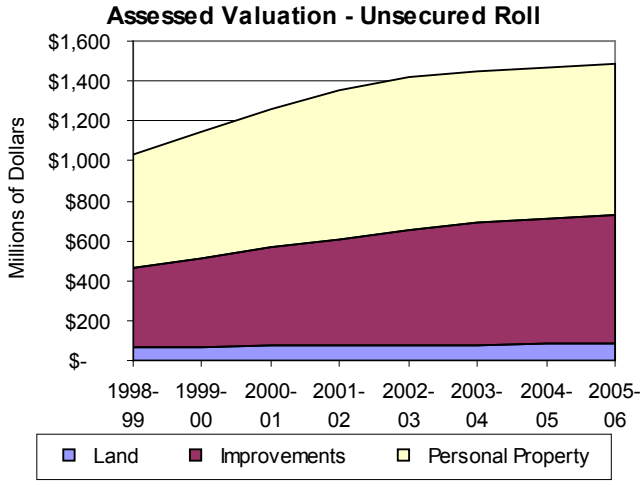
Since the 1998-99 fiscal year, total net assessed valuation in Marin increased from $25.6 billion to $45.1 billion, a 76% increase. The secured roll land valuation, which includes real estate, increased 102%, from $10.4 billion to $21 billion during the same period. Improvement valuation (e.g. the house or commercial building) increased from $15.1 billion to $23.9 billion, or 58%. Resale results 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 and saw similar increases, with personal property increasing from $574 million in 1998-99 to $766 million in 2002-03. Personal property valuation has slowly decreased from its 2002-2003 level of $766 million to $650 million in 2005-2006.

Exemptions, such as the $7,000 homeowner exemption and an adjustment for senior-owned properties, increased at a much lower rate, from $996 million to $1.3 billion, or 31%, far less than the overall increases in assessed valuation.

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 construction of home improvements results in the basis being adjusted to the purchase price or improved value at the time of construction, but 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.





Significant Drop in New Office, Retail , or Industrial Space

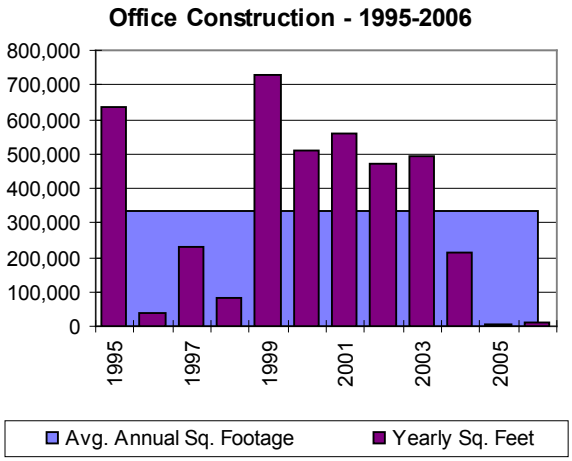
The number of square feet added each year has varied widely between office, retail, and industrial due to various trends in economic development. Between 1995 and 2002, new nonresidential construction increased, peaking in 1999 and then declined thereafter. Significant declines occurred between 2005 and 2005.

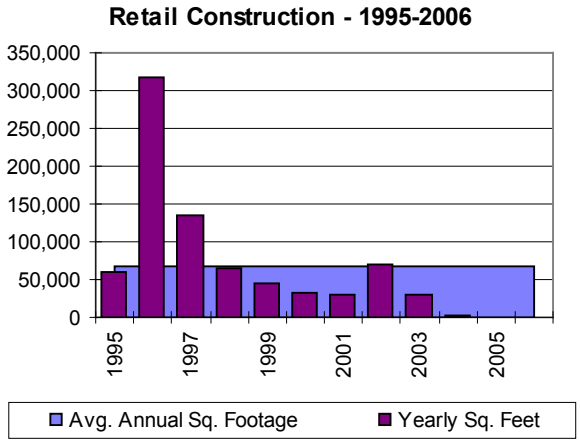
Office:

Construction of office space has resulted in nearly four million square feet, with about 331,630 square feet annually being added to the county's stock 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. Less than 100,000 square feet were constructed each year in 1993, 1996 and 1998. Completion of additional office space was expected to drop considerably as few new projects had been undertaken due to significant vacancies in existing office space. This assumption has been validated as seen in 2004, where construction dropped by nearly 50% of the previous year.

Retail:

Retail space has increased by an average of 66,397 square feet annually since 1995 for a total of 796,765 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.



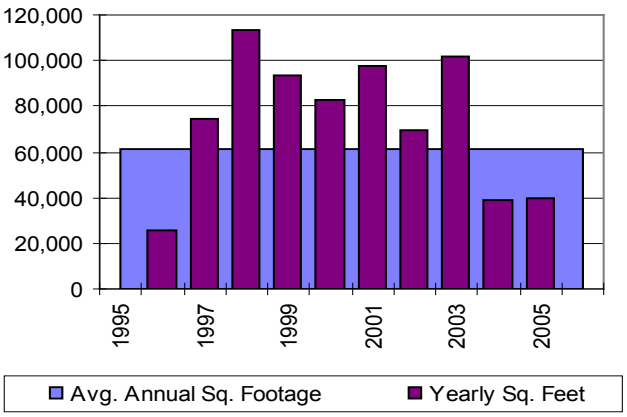


Source: Marin County Community Development Agency

Industrial:

Nearly 700,000 square feet of industrial space has been constructed since 1995, an average of 69,685 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.

Industrial Construction - 1995-2006



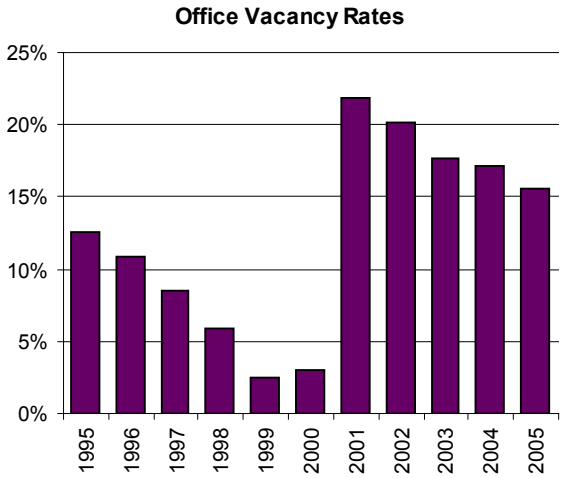
Source: Marin County Community Development Agency

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

Office Vacancy Rate is Volatile, Retail and Industrial More Stable

Vacancy rates have fluctuated considerably between 1995 and 2005, 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, 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 lack of substantial office projects in the pipeline, future years could see extremely low vacancies once again. This pattern is also possible for industrial vacancy rates since little industrial space is being added.

Source: Orion Partners

Office:

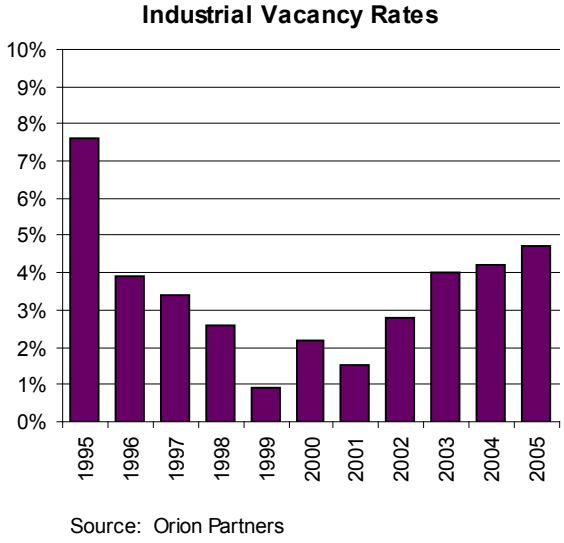
The office vacancy rate was 12.6% in 1995 and plummeted to 2.5% in 1999 before increasing slightly to 3.0% in 2000. Even as a considerable amount of office space had been constructed in the late 1990's demand had far exceeded supply. The construction activity of 1998 and 1999, along with projects already underway in 2000, and the severe downturn in the economy turned the office market upside down with vacancy rates skyrocketing to 21.9% in 2001. By 2005, rates had gradually decreased to 15.6% but this level was still higher than the previous high point in 1995.

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. Unlike the office market, retail construction has been relatively incremental and the sector was not affected by the economic downturn to the degree that other sectors were.

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%, still below the accepted 5% level of a balanced market.



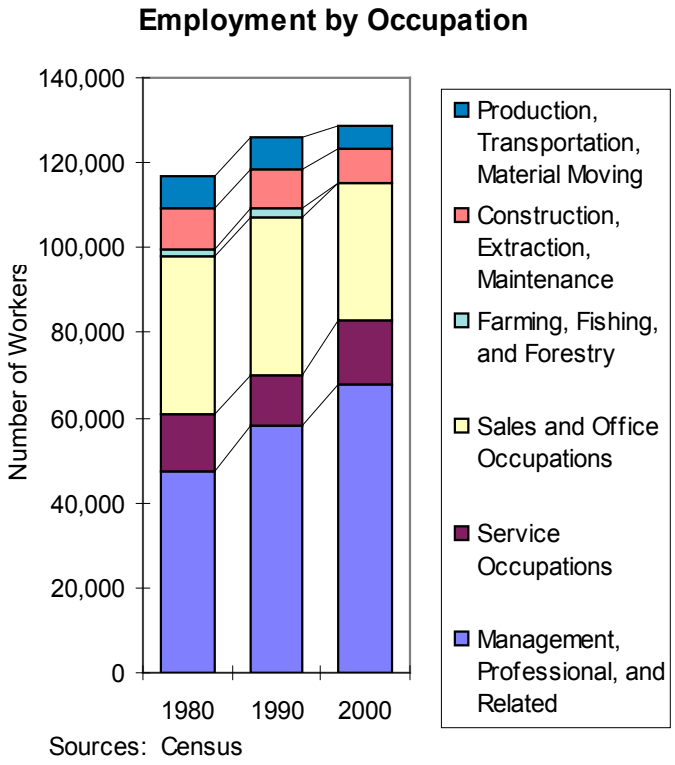
Source: Orion Partners

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 because of higher rent potential, higher rents can discourage business owners looking to expand or locate here, especially with the 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% increase in the total number of Marin resident workers. The absolute number of Management and Professional people significantly increased from 47,416 in 1980 to 67,674 in 2000, and represent over half of Marin County's workforce. Service occupations have also grown, from 13,617 workers in 1980 to 15,446 in 2000. This is only a slight increase in the share of the workforce from 11.7% in 1980 to 12.0% in 2000. 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 occupations in Sales and Office increased from 36,885 to 37,193 between 1980 and 1990, they then decreased to 31,867 in 2000. Construction, Extraction & Maintenance occupations and Production, Transportation & Material Moving occupations both decreased about 21% over the 20-year period. Marin residents in Construction, Extraction & Maintenance fell from 9,816 in 1980 to 7,706 in 2000, experienced a decrease in the share of the workforce from 8.4% to 6.0%. Those employed in Production, Transportation & Material Moving dropped from 7,304 in 1980 or 6.3% of the workforce to 5,788 in 2000 or 4.5%. However, the most significant decrease was in the number of residents employed in Farming, Fishing and Forestry. Beginning at 1,772 employed in 1980, the number fell to a mere 374 in 2000, an overall 78.9% decrease between 1980 and 2000. Since the data for Employment by Occupation originates from the most recent U.S. Census (2000), more recent data is not available.



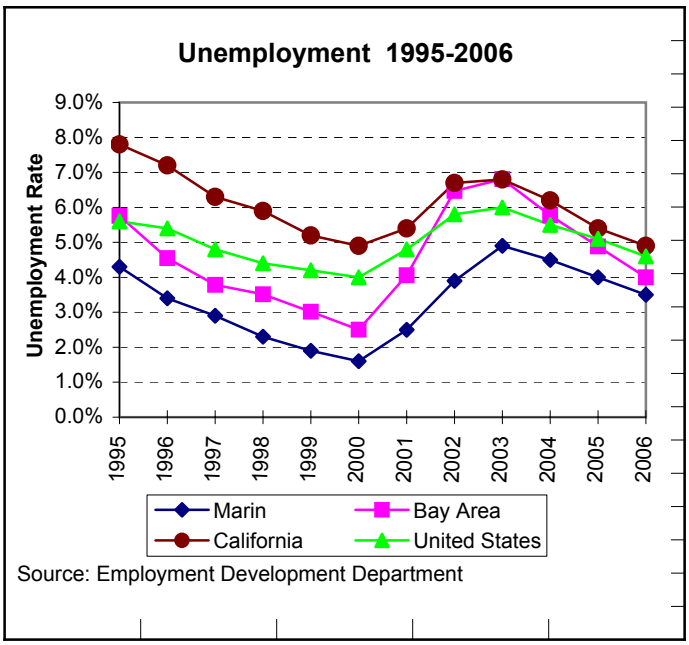
What this means:

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 are in higher earnings 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 Unemployment Remains Low

Unemployment in the county has remained low over the study period, especially when compared with the Bay Area, California, and U.S. averages. Marin's peak level of unemployment was 4.9% in 2003, compared with 4.3% in 1995 and 4.5% in 2004. 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. During the employment boom of the mid- to late-1990's, unemployment rates in Marin decreased every year to a low of 1.6 % in 2000. Starting in 2001, unemployment began rising again to the 2003 peak of 4.9% before decreasing to 3.5% in 2006.

While it appears that Marin's unemployment rate will continue to trend downward, many of the high technology jobs that employed many in Marin's workforce may be slow to return.



What this means:

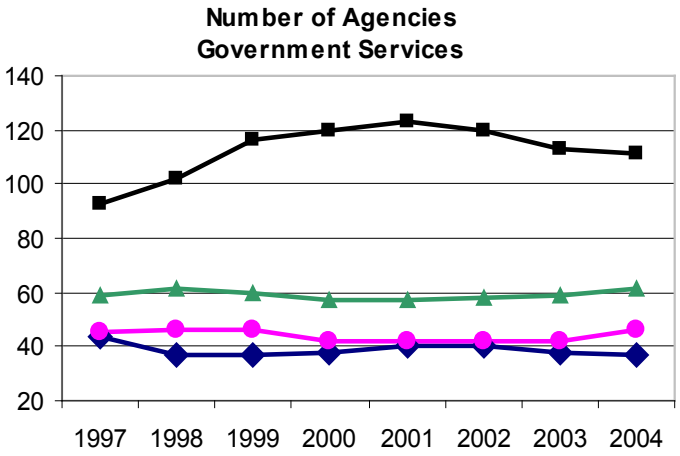
Unemployment rates are indicative of the overall health of the economy. High unemployment, especially in volatile industries such as construction and manufacturing, results in fewer dollars spent on goods and services and can have secondary effects on other sectors of the economy. Exceptionally low unemployment 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 has had greater negative effects on Marin's economy that is indicative of the concentration of jobs in that sector that were created through the 1990's. It is also important to note that persons who are self-employed, which includes the significant number of home-based businesses in Marin, are not included in unemployment statistics.

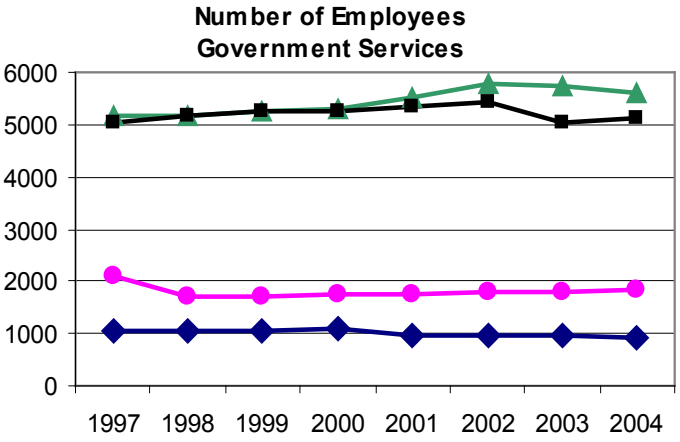
Public Sector Employment Remains Stable; Number of Agencies Varied

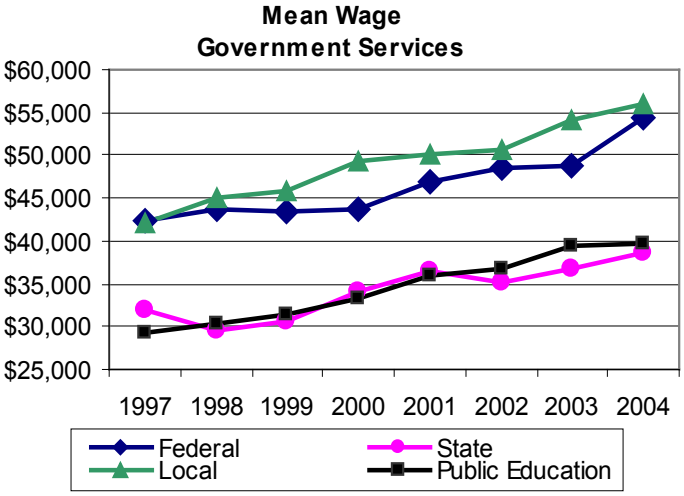
The total number of federal, state and local government service agencies has remained relatively constant between the years 1997 and 2004. Overall, federal agency representation decreased about 16% from 44 agencies in 1997 to 37 in 2004. State agencies decreased from 45 in 1997 to 42 in 2000, with the most State agencies in operation at 46 in 1998-1999 and 2004. The number of local establishments increased from 59 in 1997 to 61 in 1998 but decreased to 57 in 2000, with the amount of current local agencies in operation up from 2000 at 61. 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 and scaling back to 111 facilities in 2004.

For all categories of Government Services, excluding local government, the number of employees also varied but generally declined. Even though local government experienced a slight decline from 2003 to 2004, the number of employees maintained by local government has increased overall since 1997. The number of federal service employees fluctuated, but overall decreased from 1,069 in 1997 to 928 in 2004. The number of State service employees also fluctuated but declined from 2,101 in 1997 to 1,747 in 2001 with a slight increase to 1849 in 2004. Public education was the only sector that saw an increase in employment, from 5,035 in 1997 to 5,424 in 2002 but has since experienced a significant decline in the number of employees in 2003 to 1997 levels before increasing again to 5,131 in 2004.

Average annual wages increased in every division of Government Services. Federal service wages increased form $42,255 in 1997 to $54,367 in 2004. State service wages increased to $38,542 in 2004 from $32,056 in 1997. Public education wages also increased from $29,252 in 1997 to $39,570 in 2004. Local service wages increased from $42,197 in 1997 to $56,046.





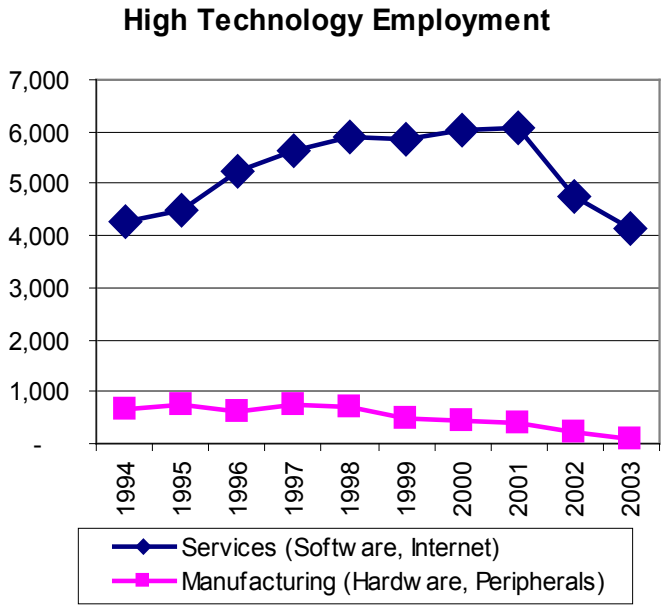


What this means:

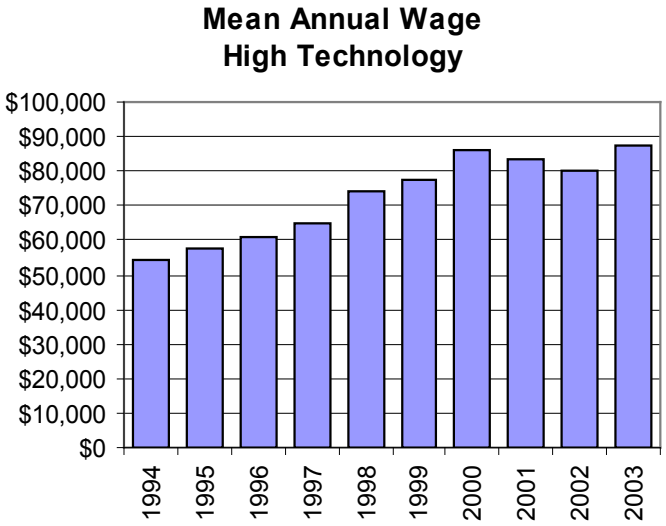
The number and size of government entities usually does not fluctuate greatly. However, consolidations and reorganizations do affect the total number of agencies. Increased demand for public services does not necessarily dictate an increase in public employment, as many government revenues are earmarked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

High Tech Retreats to 1994 Employment Levels, Wages Have Stabilized

The high technology sector in Marin showed significant growth in employment and wages through the 1990's, increasing from 4,253 workers in 1994 to a peak of 6,613 in 1998 before declining to 6,462 in 2001 and then plummeting in 2002 and 2003 to only 4,157 workers, a 37.1% decrease. These figures do not include firms involved in motion picture production, which provide additional high tech-related employment. Wages increased overall through the period, from $54,246 in 1994 to a peak of $87,601 in 2003. Wages did decrease in 2001 and 2002 by 6.8% to $80,417 before rebounding in 2003 followed by a 3.8% decrease to $83,020 in 2001, although not commensurate with the contraction in the sector overall. The mean wage for high tech services is more than double the average wage for all industries countywide.



High tech is broken into two subgroups: services, which includes 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 1998. However, starting in 1998, employment in manufacturing began dropping precipitously such that by 2003 employment was 75, only 10% of the 1997 peak. High tech services, however, saw a 64% increase in employment, from 3,677 in 1993 to a peak of 6,081 in 2001 but also plummeted 31.6% to 4,157 in 2003.



Sources: Census, Employment Development Department

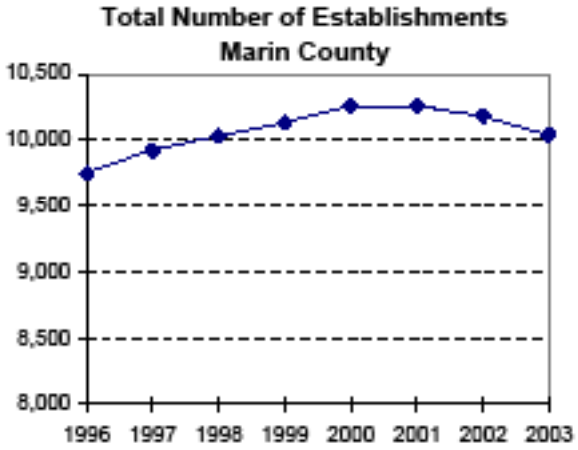
What this means:

High tech employment, especially software, multimedia, and internet businesses, were the fastest growing employment sector 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, wages have not decreased as significantly. The high wages provided by these types of jobs enable employees to compete in Marin's tight housing market. High tech services are also a relatively 'clean' industry, meaning that business growth in the county is avoiding 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.

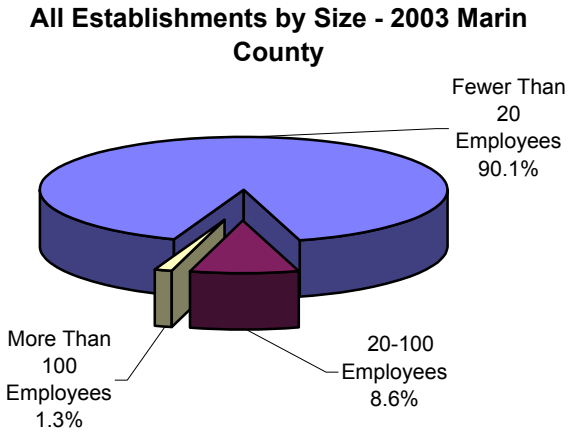
High tech manufacturing is not as clean and efficient as compared to the High Tech Services subgroup as the fabrication of circuit boards, silicon chips, and specialized equipment requires the use of a variety of chemicals and intensive water use. Because the vast majority of job growth in this sector has been more service related than manufacturing related, increased high tech employment in Marin has resulted in desirable job creation, from an economic, social, and environmental perspective.

Cluster Focus

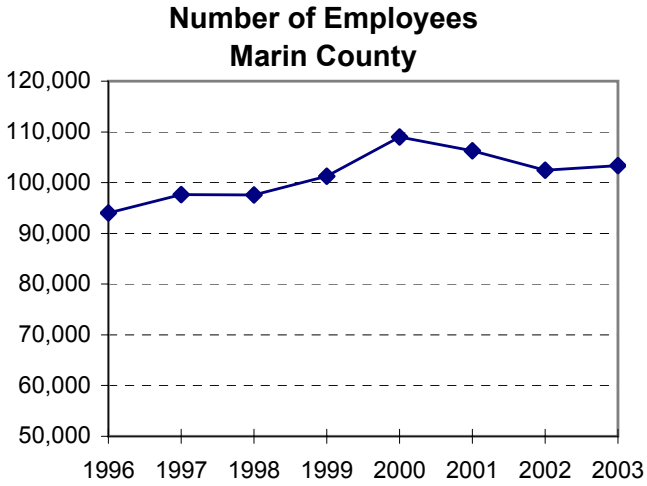
Overall, the number of establishments in the county increased steadily in the late 1990's but retreated by 2003. An 'establishment' is a physical place of business and does not include persons without a physical business address in the county (e.g. contract employees or employees working remotely for a company not based in Marin). The number of establishments increased from 9,748 in 1996 to a peak of 10,257 in 2001 and then decreased to 10,040 in 2003, comparable to the 10,031 Marin businesses in 1998. This represents and increase in establishments of 5.2% between 1996 and 2001, and a net increase of 3.0% between 1996 and 2003.



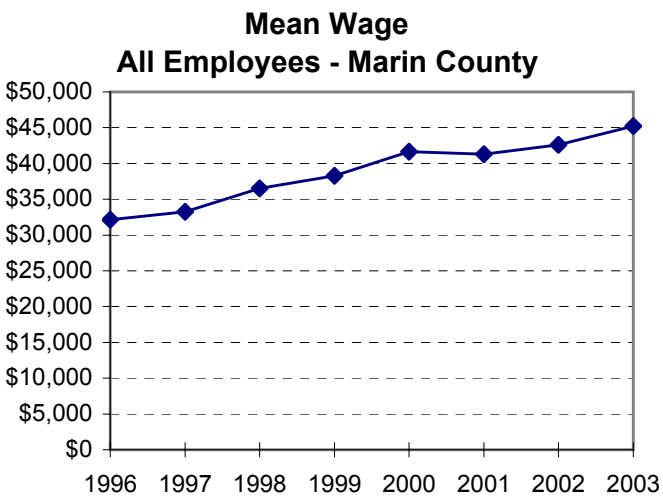
The proportion of business size, when looked at by number of employees, has remained relatively constant and small businesses are the lion's share of all business establishments in Marin. In 2003, 9,046 or 90.1% of all establishments employed fewer than 20 persons. Businesses employing 20 to 100 comprised 8.6% of all establishments and only 1.4% of employed more than 100 persons.



Overall employment has grown at more than three times the rate of business establishment growth between 1996 and 2003. Although there was a slight decrease between 1997 and 1998, employment increased from 94,024 persons in 1996 peaking at 109,012 in 2000, a 15.9% increase. With the subsequent recession, employment decreased in 2001 and 2002 to 102,449 but rebounded in 2003 to 103,386. This reflects a net increase of 10.0%, although employment declined somewhat between 1997 and 1998.



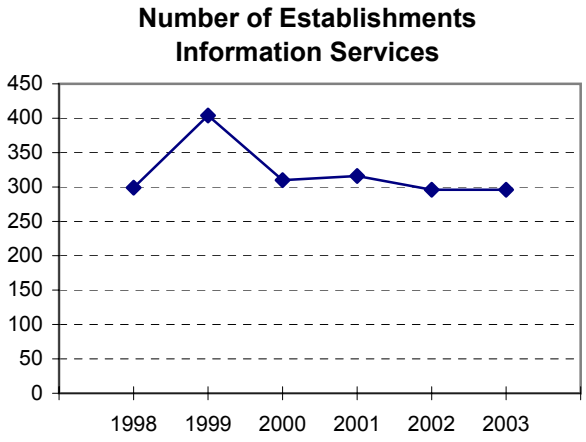
Mean wages during the period increased substantially from 1996 to 2000, from $32,120 in 1996 to $41,652 in 2000, nearly 30%, . After a slight dip in 2001, to $41,289, mean wages increased again in 2002 and 2003 to $45,203, an increase of 40.7% over seven years, well above the annual inflation rate for that period. As is shown in the individual cluster data, significant 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 such as retail and food service typically did not realize the same wage appreciation, either absolutely or by percentage.

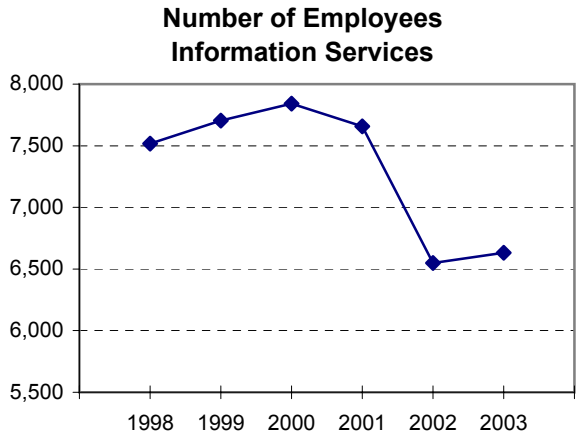


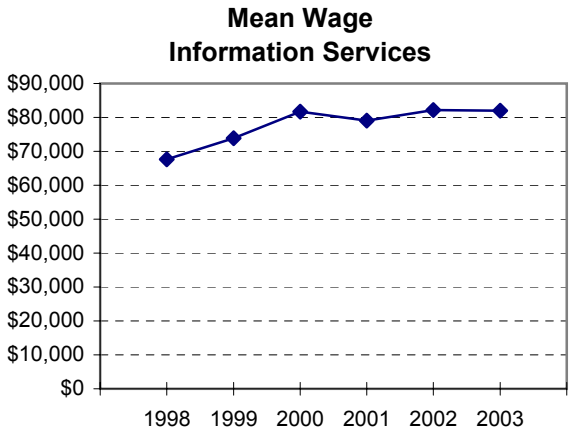
Information on major groups of employers in Marin is provided on the following pages. Data comes from *County Business Patterns* (Bureau of the Census). County Business Patterns figures do not include persons who are solely self-employed. Data provided in County Business Patterns are aggregated by the North American Industrial Classification System (NAICS), a standardized classification system for the entire spectrum of commercial enterprises, non-profit organizations, and public service agencies and 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. Further, County Business Patterns does not include data from sole proprietors or public employers. Therefore, the actual employment figures are higher than are indicated here. Reliable sole proprietor data is not available while public sector employment is discussed separately on page 44.

Cluster Focus: Information Services

Information Services includes publishing, software, and computer and data processing services. This sector saw significant growth through the 1990's and increased from 7,518 in 1998 to 7,842 in 2000. However, technology sector collapse since then resulted in a 15% decrease to 6,633 workers. Mean wages followed similar trends between 1998 and 2002, increasing from $67,652 in 1998 to $81,967 in 2000, dropping to $79,053 in 2001 and increasing again to $82,160 in 2002. However, there was a slight decrease to $81,962 in 2003. Total establishments also jumped from 299 in 1998 to 404 in 1999. However, in 2000 there was a significant drop in total establishments to 310, a slight rebound to 316 in 2001, followed by a decrease to 296 in 2002 and 2003.

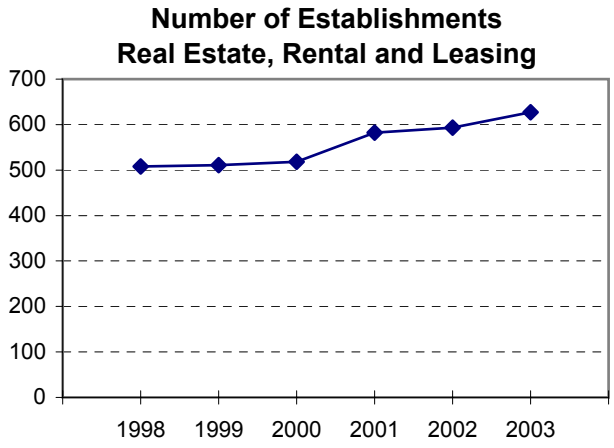


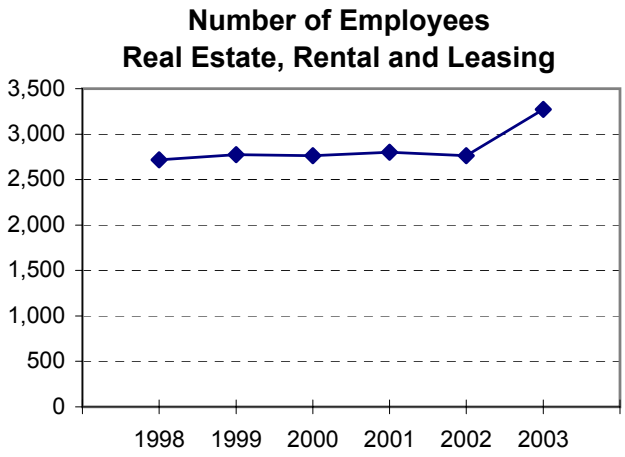


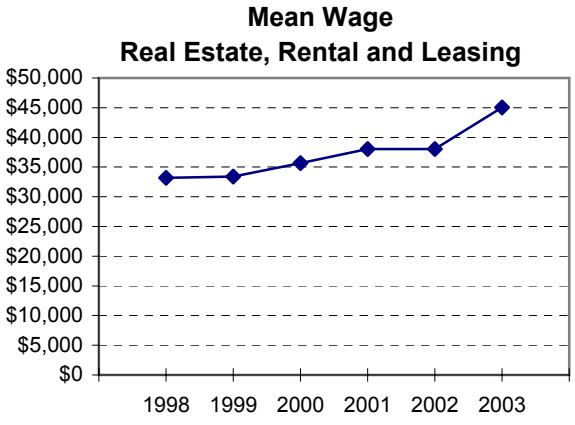


Cluster Focus: Real Estate, Rental,

Real Estate, Rental, and Leasing includes not only residential and commercial real estate ventures but also leasing of vehicles or equipment. This industry cluster has shown significant increases across the board between 1998 and 2003, excepting slight decreases in employees and wages between 2001 and 2002. Sustained strong activity in the housing market protected this cluster from the impacts that afflicted the technology sector. Between 1998 and 2003, establishments increased 23.4%, from 508 to 627, employment increased 20.4%, from 2,718 to 2,799, and wages increased 35.6% from $33,198 to $45,031.

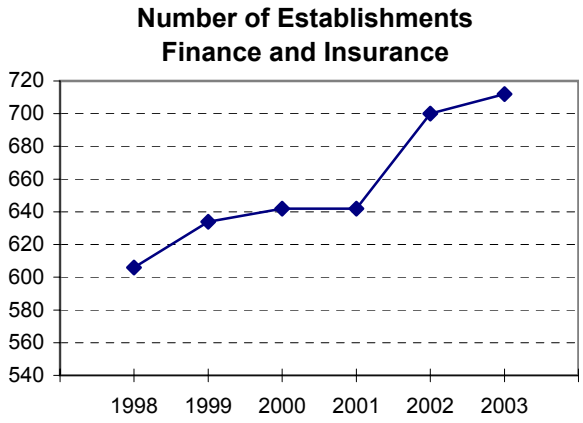


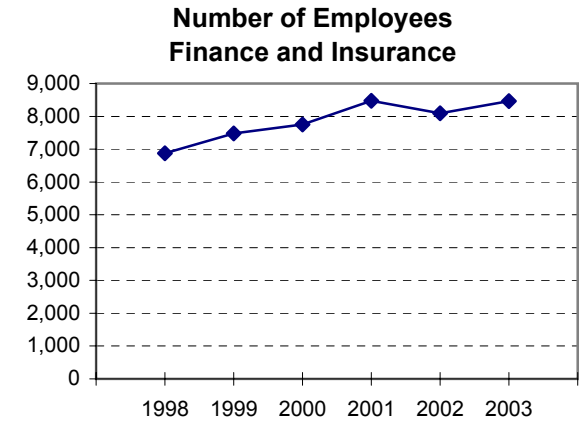


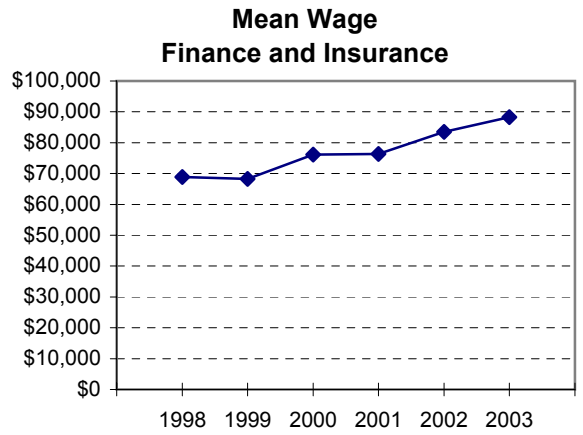


Cluster Focus: Finance and Insurance

The Finance and Insurance cluster has shown strong growth. Wages steadily increased 28% between 1998 to 2003, from $68,894 in 1998 to $88,308 in 2003, excluding a slight dip in 1999. The number of establishments increased every year, from 606 in 1998 to 712 in 2003, a 17.5% increase. Employment in this cluster increased significantly between 1998 and 2001, from 6,879 in 1998 to 8,473 in 2001. Although employment decreased in 2002, it rebounded to 8,465 in 2003, near the 2001 peak.

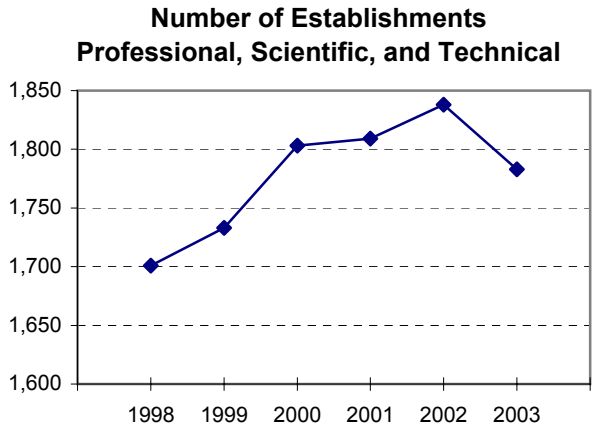


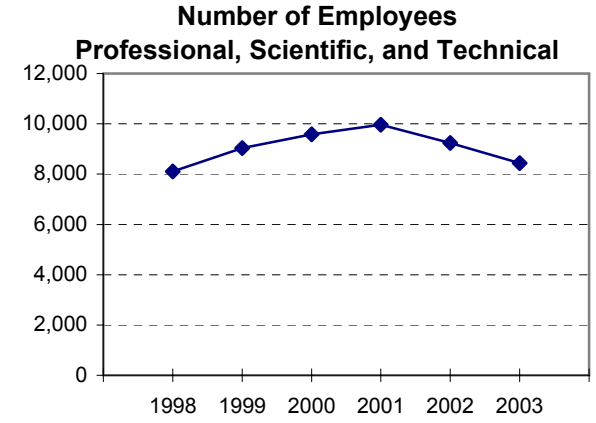


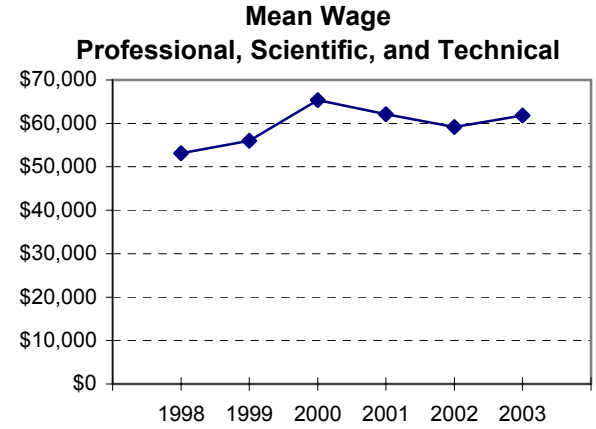


Cluster Focus: Professional, Scientific, and Technical Services

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 generally tracked the overall health of the economy. Establishments increased from 1,701 in 1998 to 1,838 in 2002, but decreased by 50 to 1,783 in 2003. Employment increased 23%, from 8,112 in 1998 to 9,966 in 2001, but receded to 8,443 by 2003. Wages were well above the county average at $53,139 in 1998 but peaked in 2000 at $65,334 Wages decreased to $59,170 by 2002 before rebounding to $61,830 in 2003.

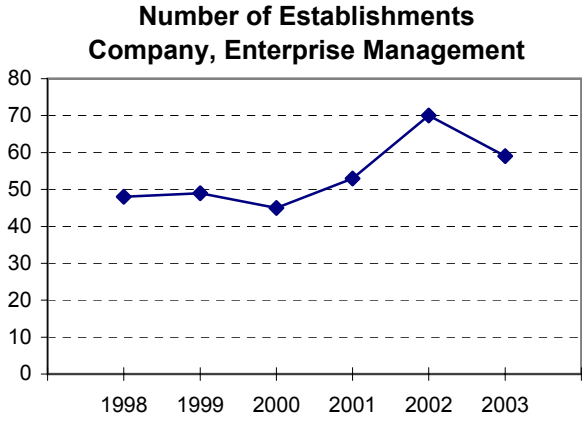


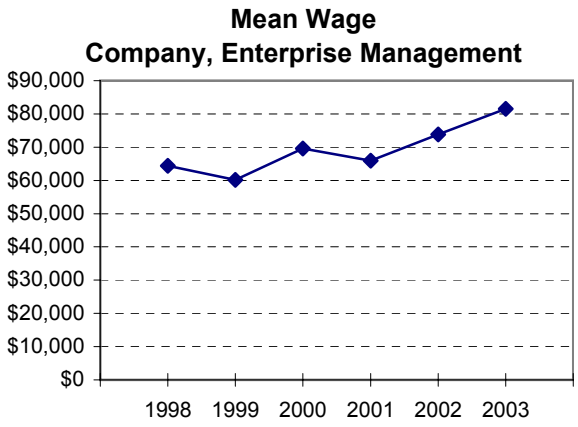




Cluster Focus: Management of Companies and Enterprises

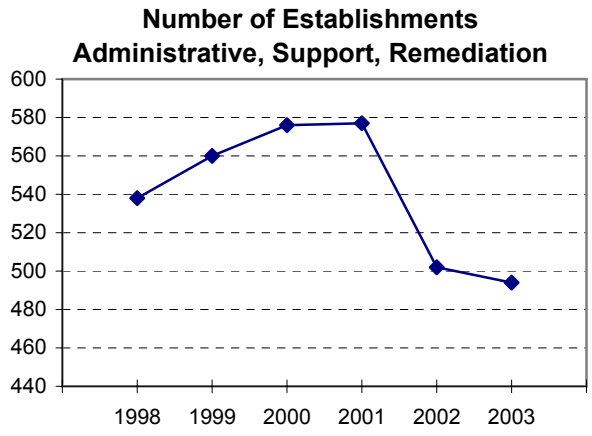
Management of Companies and Enterprises includes parent corporations and holding companies. It is a relatively small cluster in Marin but, as would be expected, has an average wage nearly twice the county average. These firms increased from 48 in 1998 to 70 in 2002. However, this figure decreased to 59 in 2003. Employment between 1998 and 2001 jumped 33%, from 1,192 to 1,579, but decreased to 1,284 in 2002 before increasing again in 2003 to 1,461. While compensation is high in this sector, it varied considerably, from a low of $60,117 in 1999 to a high of $81,524 in 2003.

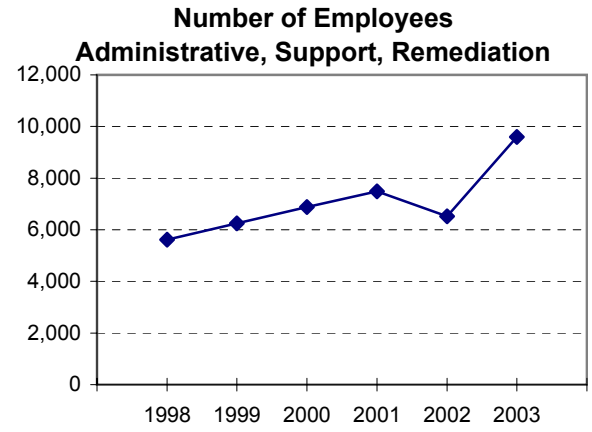


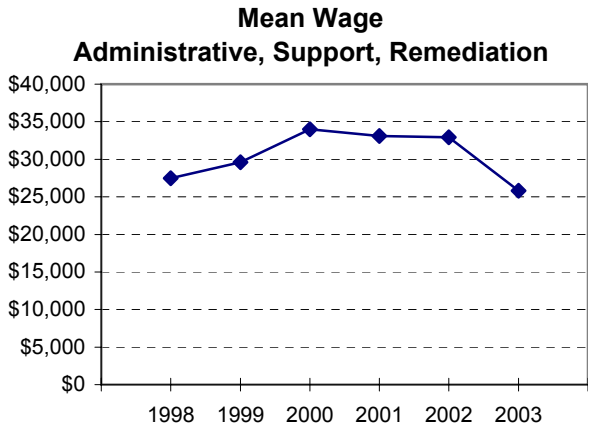


Cluster Focus: Administrative, Support, Waste Management, and Remediation

Administrative, Support, Waste Management, and Remediation Services includes everything from business support including temporary personnel agencies to waste hauling and site remediation services. The number of establishments increased from 538 in 1998 to 577 in 2001 while employment increased from 5,618 to 7,489. The mean wage also increased from $27,471 in 1998 to $34,003 in 2000. The number of establishments dropped sharply, to 494 by 2003 which was less than in 1998. The mean wage began decreasing in 2001 and continued that trend through 2003 when it dropped to $25,815, a decrease of 24.1% from the 2000 peak. Employment rose from 5,618 in 1998 to 7,489 in 2001. After decreasing to 6,521 in 2002, employment shot up in 2003 to 9,594, a one year increase of 47.1% and a net increase of 70.1% since 1998.

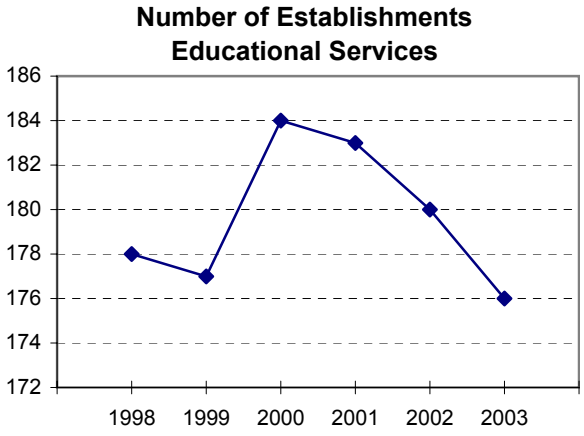


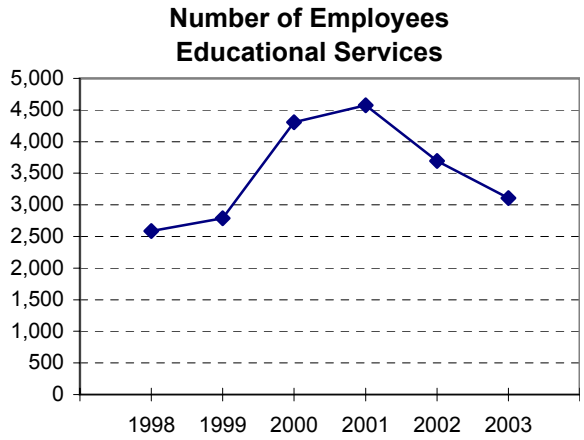


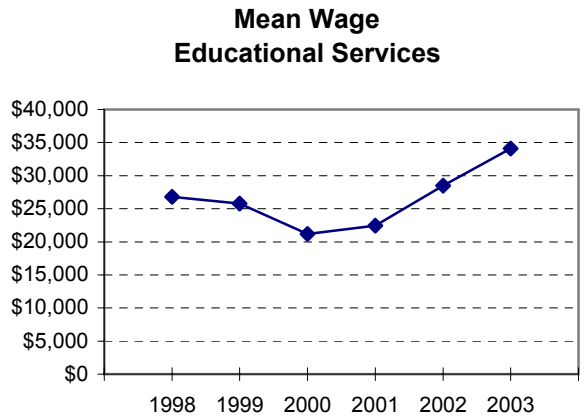


Cluster Focus: Educational Services (Private)

Educational Services includes private educational institutions, ranging from pre-schools to colleges. Public education data are discussed under Government Services on page 44. Employment increased from 2,584 in 1998 to a high of 4,574 in 2001. By 2003, employment had decreased over two years by nearly one third, to 3,109. The number of institutions was relatively stable but decreased from 178 to 177 from 1998 to 1999 but increased to 183 by 2001, only to retreat to 176 by 2003. Wages, however, decreased from $26,803 in 1998 to $21,189 in 2000 but then rapidly escalated to $34,113 between 2001 and 2003. Wages for this group can be somewhat deceiving in that college level educators tend to be better compensated than pre-school and private school instructors.

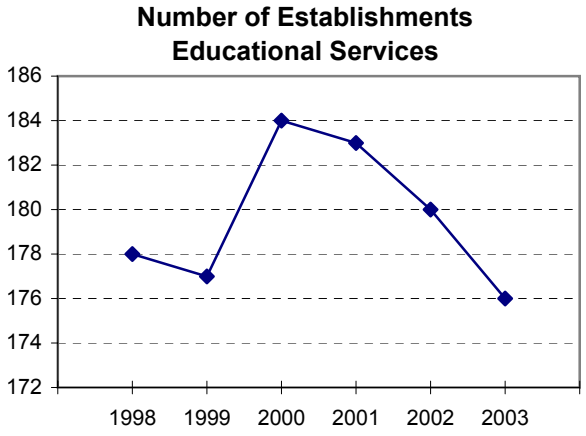


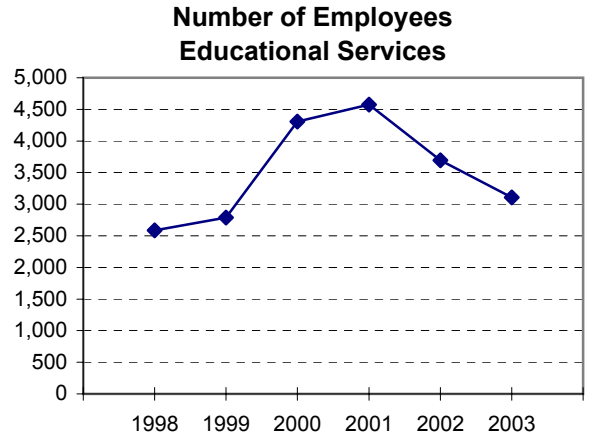


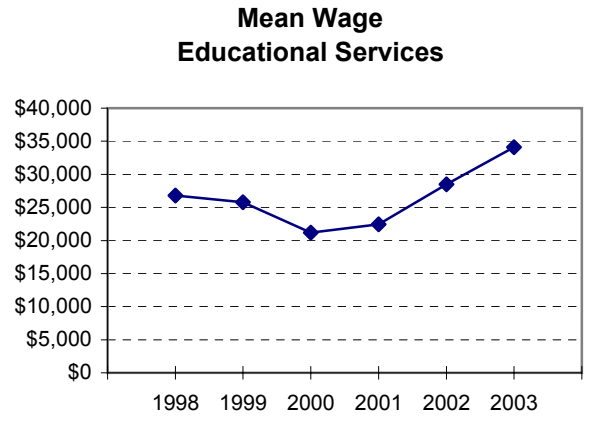


Cluster Focus: Manufacturing

The Manufacturing cluster has seen considerable contraction, shedding 21% of establishments and 51% of its employment between 1998 and 2003. Establishments decreased from 337 to 266 while employment decreased from 4,731 to 2,300 during this period. Mean wages have remained relatively flat, especially when factoring in inflation, hovering around $38,000 annually between 1998 and 2001. Mean wages did increase by 10% in 2002 to $42,514 but decreased in 2003 to $41,194. Until 2002, manufacturing had a higher percentage of establishments with 20 or more employees than other clusters in Marin.

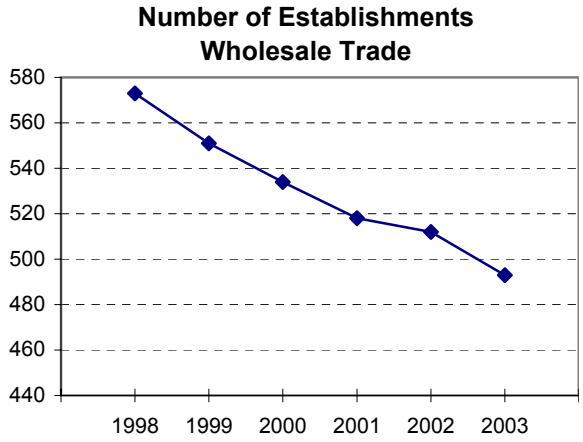


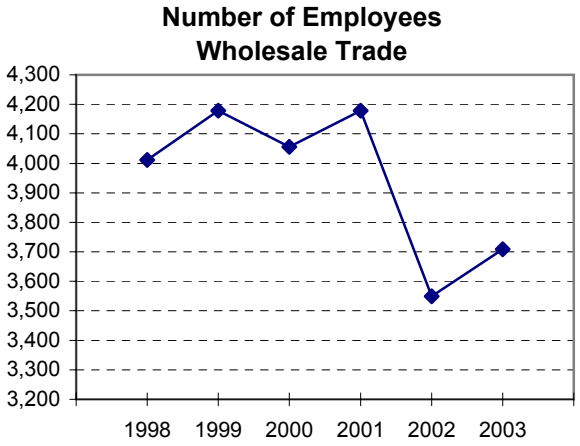


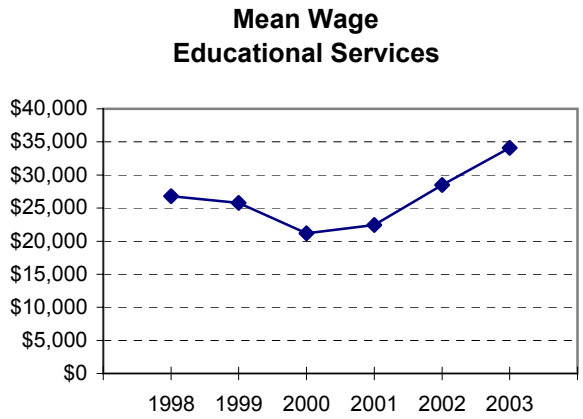


Cluster Focus: Wholesale Trade

Wholesale Trade saw a 14% decrease in the number of establishments from 1998 to 2003, dropping from 573 to 493. Net employment decreased 7.5% between 1998 and 2003, although not consistently. Employment fluctuated between a low of 4,011 and high of 4,179 from 1998 through 2001 before dropping to 3,549 in 2002 and then increasing to 3,709 in 2003. The mean wage has also fluctuated over the period but has shown a significant net increase over time. Wages increased 35.8% between 1998 and 2003, from $46,209 to 62,776. Wages were variable between 1998 and 2001, increasing, then decreasing from year to year before showing successive increases in 2002 and 2003.

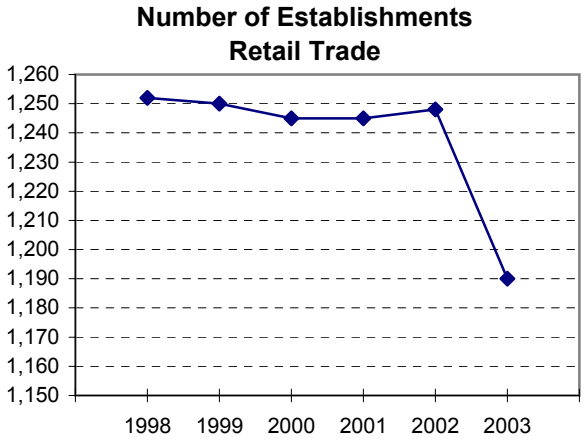


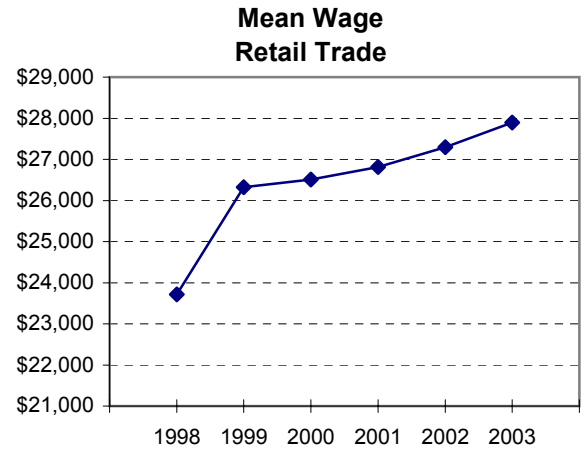




Cluster Focus: Retail Trade

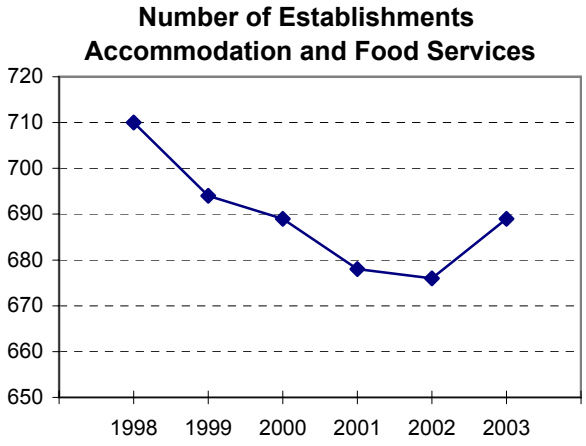
Retail Trade provides the greatest number of jobs, but also provides one of the lower mean wages. The industry has remained relatively flat over the years. The number of establishments actually decreased between 1998 and 2003, from 1,252 to 1,190, although the number of establishments only varied between 1,245 and 1,252 between 1998 and 2002. The number of employees in retail grew from 14,412 in 1998 to 16,407 in 2000. By 2003, employment decreased to 15,798 by 2003. 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. The number of employees per establishment actually increased from 11.5 in 1998 to 13.2 by 2000, and remained at that level through 2003. The mean wage has increased steadily, from $23,713 in 1998, to $27,896 in 2003. However, this increase averages just 2.5% per year, well below the average inflation rate for the period.

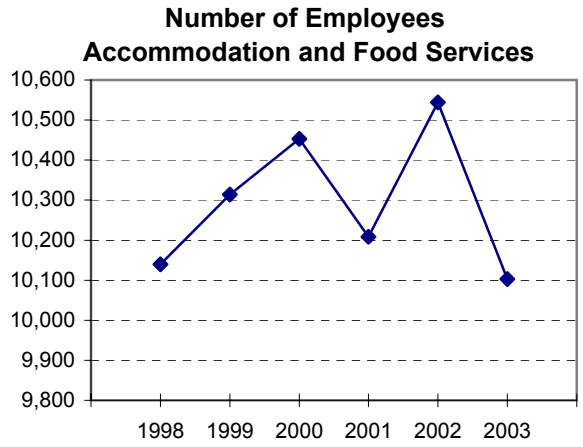


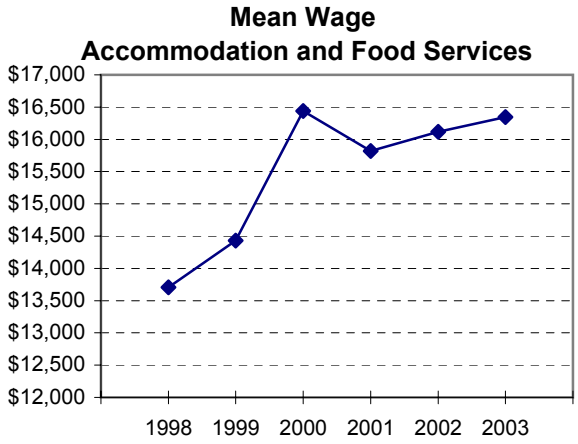


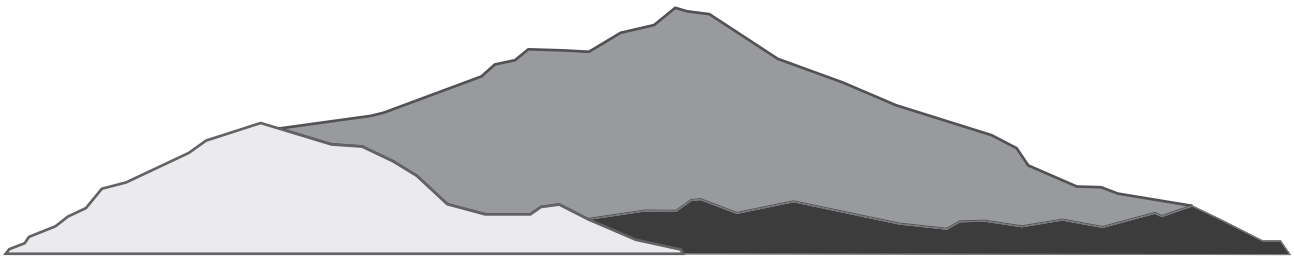
Cluster Focus: Accommodation and Food Services

The Accommodations and Food Service cluster also employs a significant number of workers, but at the same time these jobs have the lowest mean wage. The mean wage for this sector has remained just over one-third of the mean wage countywide and has fluctuated over the period from a low of $13,707 in 1998 to a high of $16,440 in 2000 and wage of $16,346 in 2003. The number of establishments actually decreased from 1998 to 2002, going from 710 to 676 before rebounding to the 2000 level of 689 establishments in 2003. Employment has also varied over the period, between the low of 10,103 workers in 2003 and a high of 10,544 in 2002. This cluster would have been most affected by the September 11 attacks locally but there appears to be negligible impact. This is probable in that Marin does not typically attract the number of out-of-state and international visitors that places like San Francisco does and the tendency for people to stay more local after the attacks would have meant many of Marin's residents would be more likely to patronize local dining establishments.





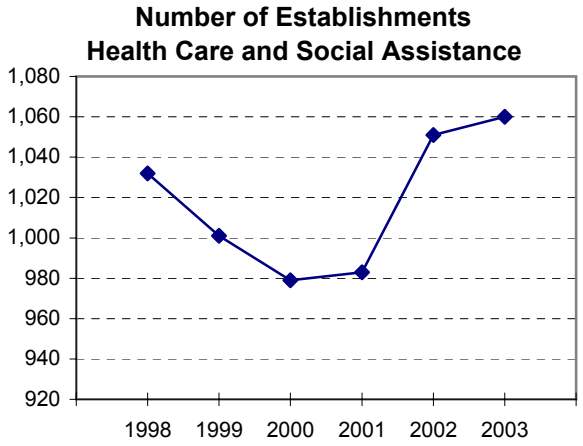


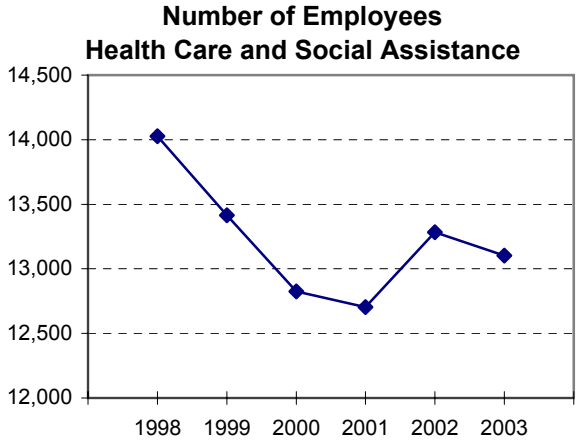


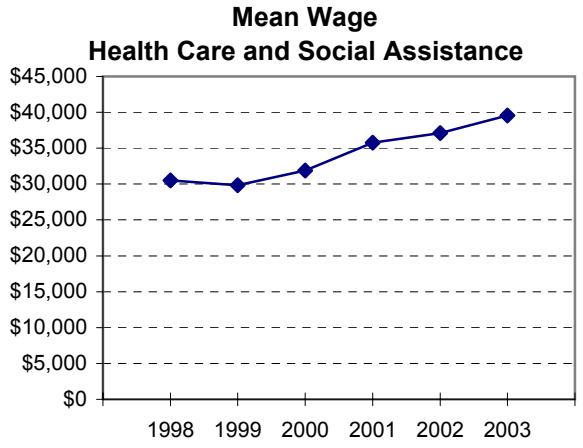
Appendix

Cluster Focus: Health Care and Social Assistance

Health Care and Social Assistance includes the entire medical field, nursing homes, community care facilities, family services, and child care. This is the second largest employment sector in the county with over 12% of jobs. Between 1998 and 2003 net employment actually decreased 6.6%, from 14,026 to 13,102, although the lowest level of employment was seen in 2001 at 12,704. At the same time, the number of establishments increased 2.7%, from 1,032 to 1,060. However, establishments did decrease between 1998 and 2001 to a low of 983 before recovering in 2002 and 2003. Wages declined only between 1998 and 1999, from $30,524 to $29,833 in 1999 but then increased every year to reach $39,574 by 2003, a 29.6% increase.

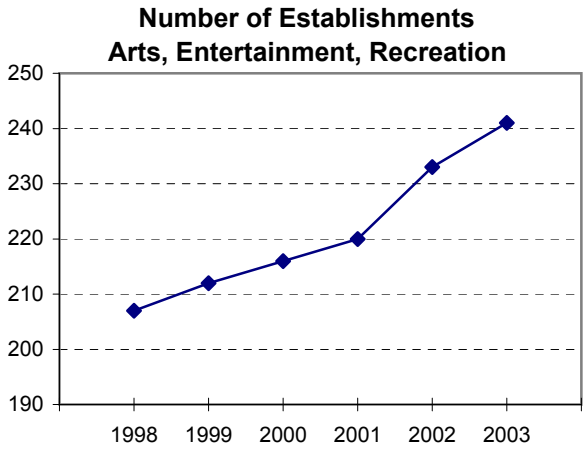


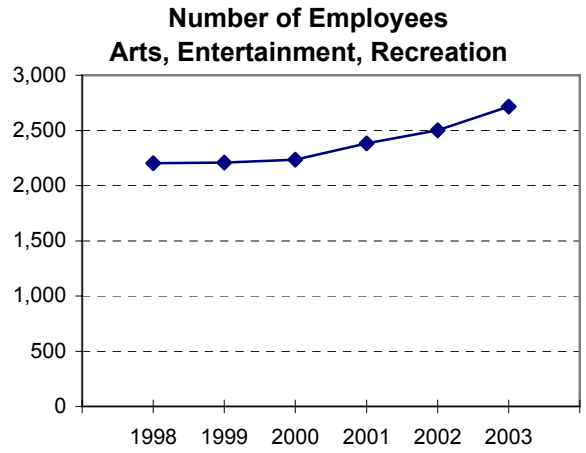


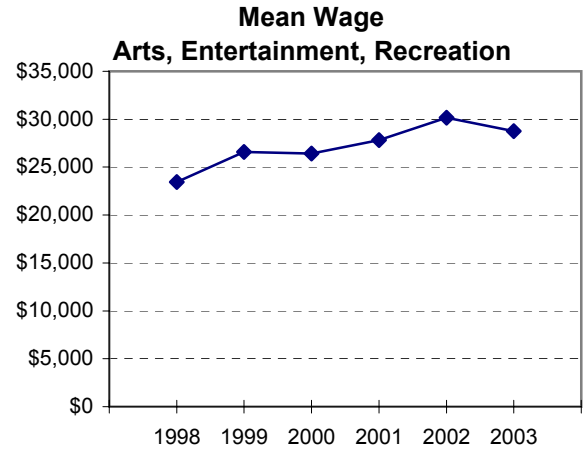


Cluster Focus: Arts, Entertainment, and Recreation

The Arts, Entertainment, and Recreation Services cluster has seen across-the-board growth over the long term. Employment has grown 23.3%, from 2,203 in 1998 to 2,716 in 2003. The number of establishments increased 16.4% over the period, from 207 to 241. Wages in this sector increased 22.5% between 1998 and 2003, from $23,459 to $28,746. As with Retail Trade, the advances in wages are tempered by the low mean wage to begin with, although wages in this cluster have better kept up with inflationary pressures.

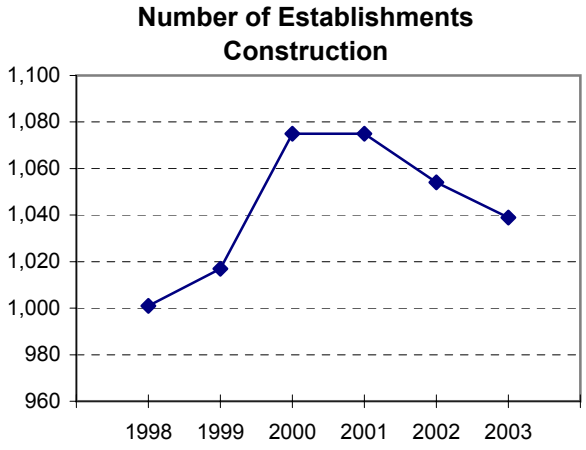


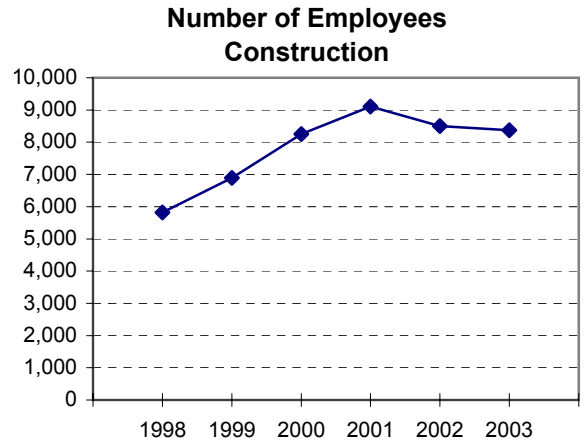


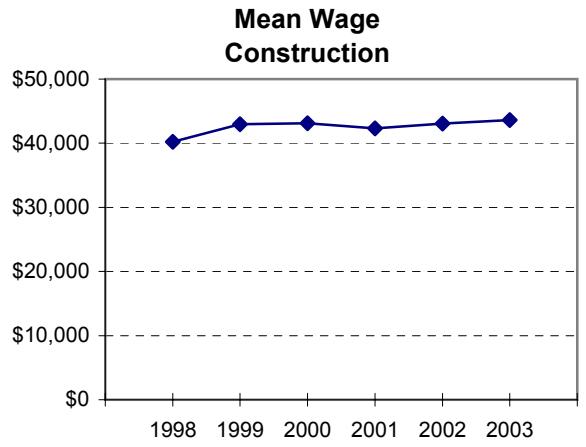


Cluster Focus: Construction

The number of construction firms and employment in the industry has followed the health of the overall economy closely. Construction firms increased from 1,001 in 1998 to 1,075 in 2000 and 2001 before declining to 1,039 in 2003. Employment increased from 5,815 in 1998 to 9,110 in 2001 and then decreased to 8,375 in 2003. Wages also increased by 7.1%, from $40,237 to $43,093 in 2000 but decreased to $42,313 in 2001. Wages rebounded in 2002, increasing again to $43,632 in 2003.

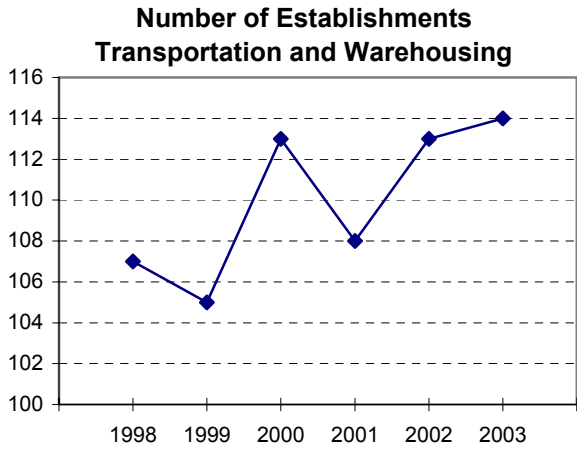


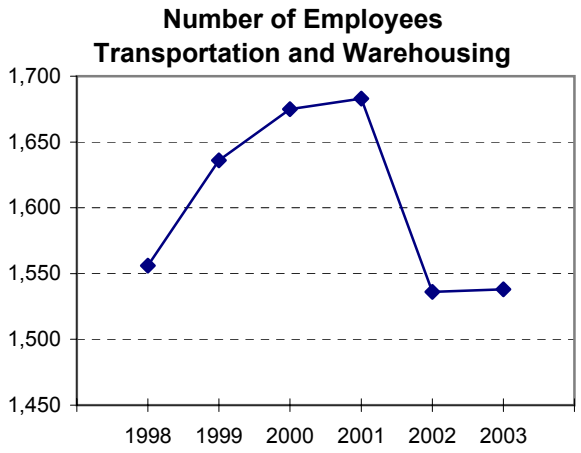


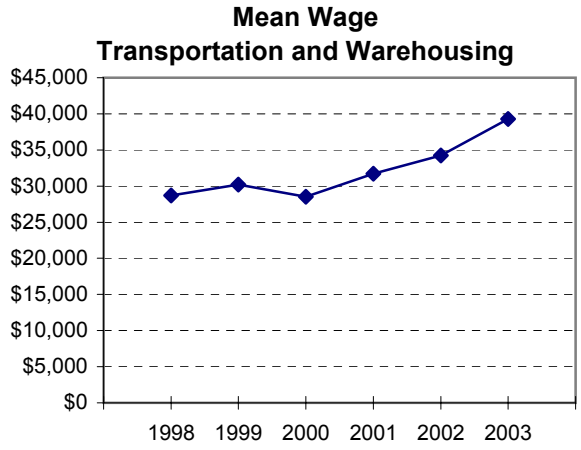


Cluster Focus: Transportation and Warehousing

The Transportation and Warehousing cluster has also varied, seeing a small overall increase in establishments and a decrease in employment. There were 107 establishments in 1998, fluctuating between 105 and 113 between 1999 and 2002 and then increasing by one to 114 in 2003. Employment increased from 1,556 in 1998 to a high of 1,683 in 2001 before decreasing to 1,536 in 2002. With 1,538 workers in 2003, employment in this cluster had a net decrease of 1.2% over the period. Wages varied between 1998 and 2000, starting at $28,689, increasing in 1999 to $30,206, and decreasing to $28,536 in 2000. Wages then increased considerably from 2001 to 2003, from $31,728 to $39,293. Overall wage increases between 1998 and 2003 totaled 37.0%

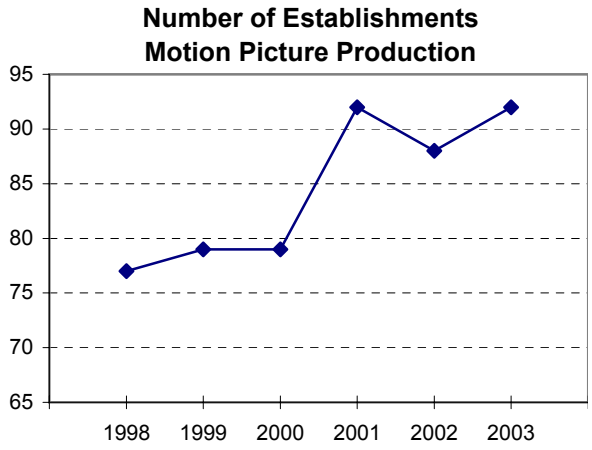


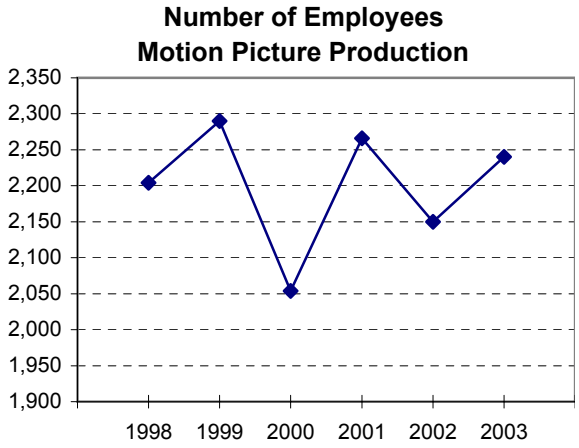


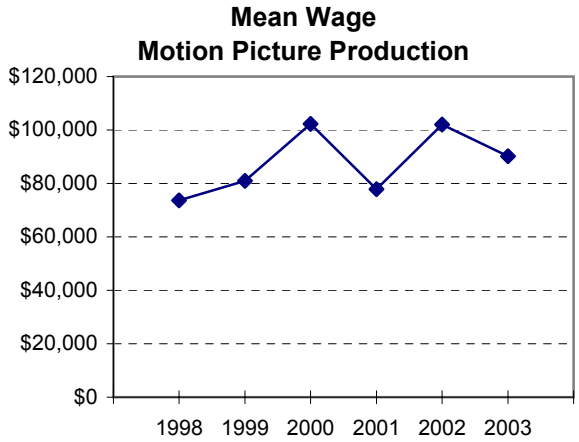


Cluster Focus: Motion Picture Production

Motion picture production is a subset of the Information Services category. Between 1998 and 2001 total establishments increased by 15 to 92. The number of establishments dropped to 88 in 2002 and then rebounded to 92 again in 2003. The mean wage has varied considerably and does not indicate any correlation with total employment or establishments. Wages increased from $73,613 in 1998 to $102,236 in 2001, maintaining the highest mean wage of any cluster until 2001 when it plummeted to $77,860. Wages jumped again in 2002 to $102,033 before retreating to $90,195 in 2003. Employment also fluctuated during the period, increasing from 2,204 in 1998 to 2,240 in 2003 with a low of 2,150 in 2002 and a high of 2,290 in 1999.

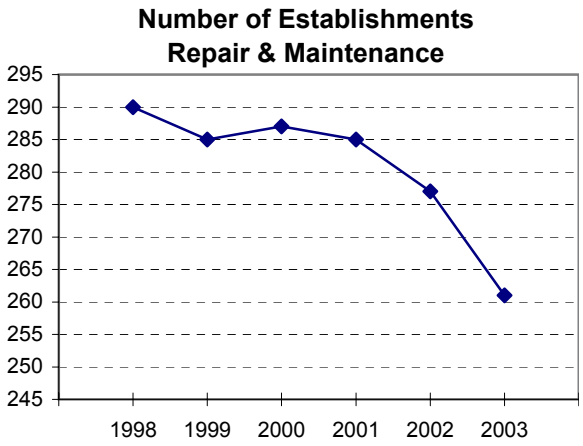


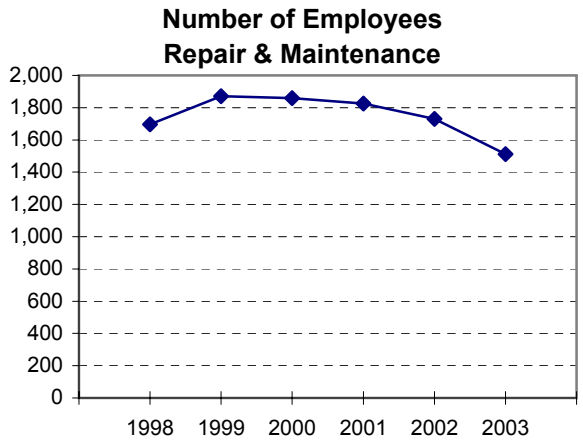


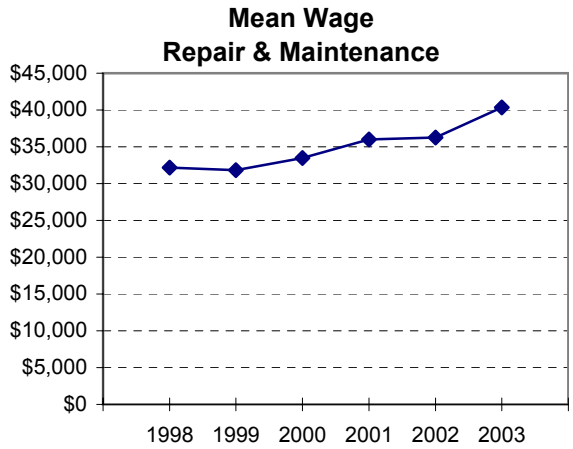


Cluster Focus: Repair and Maintenance

Repair and Maintenance Services includes automotive repair and maintenance as well as that of electronic and precision equipment, commercial equipment and personal and household goods. The number of establishments has decreased over time, from 290 in 1998 to 261 in 2003. Except for a decrease in 1999, wages have increased every year. Wages dropped to $31,821 in 1999 from $32,192 in 1998 but increased to $40,334 by 2003, a 25.3% net increase. Employment overall has decreased as well, increasing by 176 to 1,872 by 1999 and then dropping 19.3%, to 1,511.

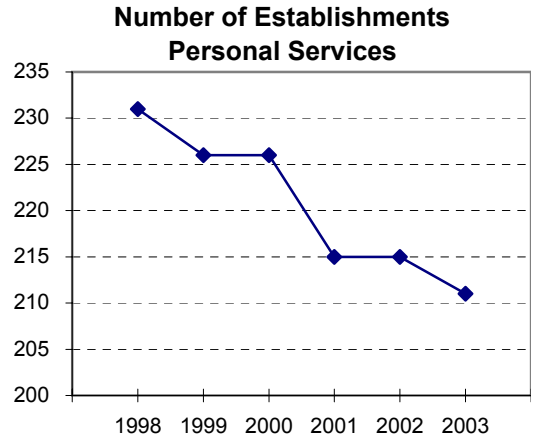


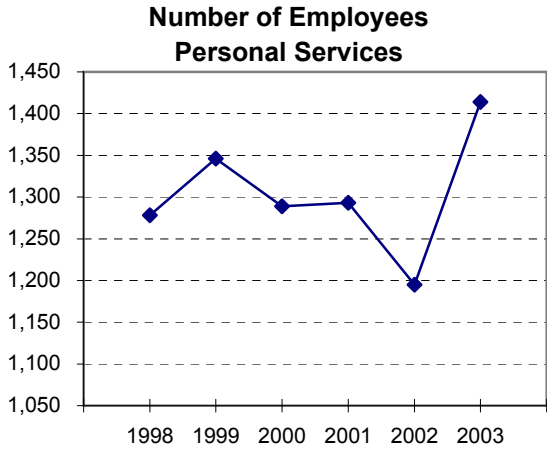


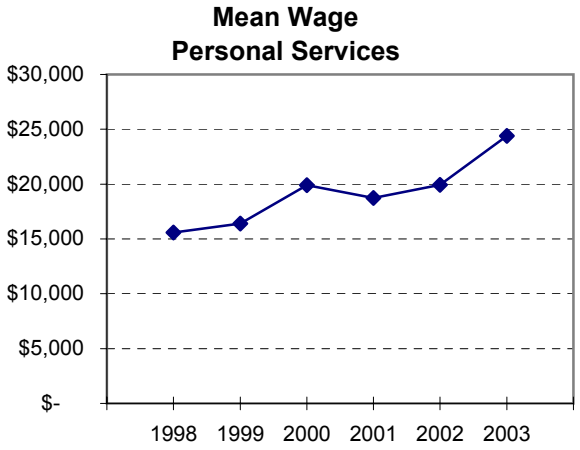


Cluster Focus: Personal Services

The Personal and Laundry Services cluster has seen a reduction in establishments but a varied but overall increase in employment. Establishments decreased from 231 in 1998 to 211 in 2003. Employment has increased from 1,278 in 1998 to 1,414 in 2003, although it was as low as 1,195 in 2002. Mean wages are extremely low in this cluster as well, although they increased 56.6% between 1998 and 2003, from $15,583 to 24,398, one of the greatest percentage increases of any cluster.

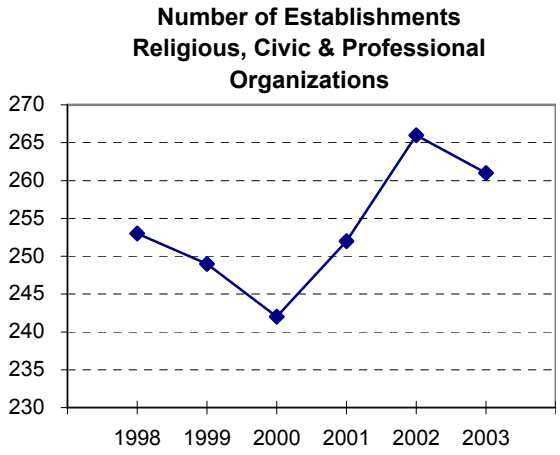


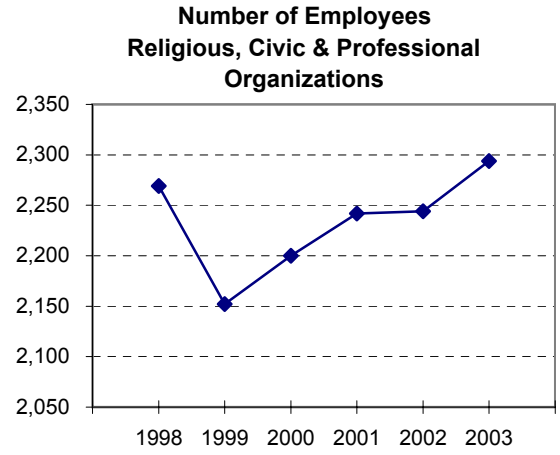




Cluster Focus: Religious, Civic, and Professional Organizations

The number of establishments varied for Religious, Grant-making, Civic and Professional Organizations, while the mean wage has gradually increased. Establishments dropped to 242 in 2000 from 253 in 1998 but then increased to 261 by 2003. The number of employees dropped from 2,209 in 1998 to 2,152 in 1999 but then increased each year to reach 2,294 in 2003. Mean wages increased 38% during the period, from $19,120 to $26,380. As with Personal and Laundry Services, mean wages are still well below the county mean, but have improved dramatically since 1998.





Sources

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

Association of Bay Area Governments
Box 2050
Oakland, CA 94604-2050
510-464-7900
www.abag.ca.gov

Bureau of the Census
Seattle Regional Office
700 5th Ave., Suite 5100
Seattle, WA 98104-5018
301-457-2794 (Washington D.C.)
www.census.gov

California Air Resources Board
1001 I St.
Box 2815
Sacramento, CA 95812
800-363-7664
www.arb.ca.gov/emissiondata

California Department of Education
721 Capitol Mall
Sacramento, CA 95814
916-657-2451
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
415-924-5560
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
363 Civic Dr.
Pleasant Hill, CA 94523
510-602-1520
www.labormarketinfo.edd.ca.gov

California Energy Commission
Media and Public Communications Office
1516 Ninth Street, MS-29
Sacramento, CA 95814-5512
916-654-4928
www.energy.ca.gov

California State Board of Equalization
Box 942879
Sacramento, CA 94279-0090
455 Golden Gate Ave., Suite 7500
San Francisco, CA 94102-3625
415-703-5400
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

Marin County Assessor
3501 Civic Center Dr., Room 208
San Rafael, CA 94903
415-499-7194
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 Agriculture
1682 Novato Blvd.
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
415-499-6528
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
415-491-2561

Marin Municipal Water District
200 Nellen Ave.
Corte Madera, CA 94925
415-945-1455
www.marinwater.org

Marin-Sonoma Market Update
Michael J. Burke
511 Sir Francis Drake Blvd.
Greenbrae, CA 94904
415-461-3000 x214

Metropolitan Transportation Commission
101 8th St.
Oakland, CA 94607
510-464-7700
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. Bureau of Economic Analysis
202-606-9900
www.bea.doc.gov

U.S. Bureau of Labor Statistics
San Francisco Regional Office
Box 193766
San Francisco, CA 94119-3766
415-975-4350
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 relevant page in the report.

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

	2000	2005	2010	2015	2020	2025	2030	2035
Marin County	247,289	252,600	258,400	264,700	270,600	275,000	279,100	283,100
Bay Area	6,783,672	6,951,500	7,263,800	7,577,300	7,914,600	8,233,400	8,554,800	8,873,300
Marin's Population as a Percentage of the Bay Area	3.65%	3.63%	3.56%	3.49%	3.42%	3.34%	3.26%	3.19%

Source: Association of Bay Area Governments, Projections 2007

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

	1980		1990		2000	
Age Cluster	Number	Percent	Number	Percent	Number	Percent
Children (0-18)	53,322	24.0%	46,137	20.1%	56,134	22.7%
Young Adult (19-29)	40,041	18.0%	33,456	14.5%	31,406	12.7%
Adult (30-64)	107,698	48.4%	122,334	53.2%	125,870	50.9%
Senior Citizens (65+)	21,502	9.7%	28,169	12.2%	33,879	13.7%

Sources: Bureau of the Census, Census of Population

Table 3 – Racial Diversity Lacking But Increasing as Marin Grows (Page 3)

	1980		1990		2000	
Racial/Ethnic Group	Number	Percent	Number	Percent	Number	Percent
White	206,642	92.8%	204,128	88.7%	207,800	84.0%
Asian or Pacific Islander	6,565	2.9%	9,442	4.1%	11,591	4.7%
Black/African American	5,626	2.5%	8,172	3.6%	7,142	2.9%
American Indian	960	0.4%	789	0.3%	1,061	0.4%
Other	2,870	1.3%	7,565	3.3%	11,116	4.5%
Multi-Racial*					8,579	3.5%
Hispanic Origin**	9,283	4.2%	17,930	7.8%	27,351	11.1%

Sources: Bureau of the Census, Census of Population
Notes: * Multi-Racial was not a separate 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	
Level of Education	Number	Percent	Number	Percent	Number	Percent
Less than 9th Grade	6,412	4.3%	6,586	3.5%	6,455	3.5%
9th to 12th Grade, No Diploma	8,721	5.8%	10,819	5.8%	9,625	5.2%
High School Diploma / GED	36,832	24.6%	31,944	17.2%	22,857	12.4%
Some College, No Degree	40,497	27.0%	47,023	25.3%	39,211	21.3%
Associate Degree	#		13,470	7.2%	11,298	6.2%
Bachelor's Degree	57,301	38.3%	47,490	25.5%	56,549	30.8%
Graduate Degree	##		28,832	15.5%	37,699	20.5%

Source: Bureau of the Census, Census of Population
Notes: * Not a separate category in 1980; data included with 'Some College, No Degree'
** Not a separate category in 1980; data included with 'Bachelor's Degree'

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

		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		
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

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

Table 6 – SAT Scores Continue to Improve and Are Well Above the State Average (Page 6)

		1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Marin County	Verbal	535	545	550	551	550	544	556	557	565	559
	Math	548	551	554	557	556	556	564	561	568	567
	Writing										561
	Total	1083	1096	1104	1108	1106	1100	1120	1118	1133	1687
California	Verbal	490	491	492	492	492	490	494	496	499	495
	Math	514	516	513	517	516	516	518	519	521	516
	Writing										495
	Total	1004	1007	1005	1009	1008	1006	1012	1015	1020	1506

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

Table 7 – High School Dropout Rate Continues to Decrease and is One-Fourth 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
Marin County	5.1%	5.7%	5.3%	5.1%	3.0%	3.4%	3.1%	2.9%	2.5%	2.5%
California	15.3%	13.0%	11.7%	11.1%	11.1%	11.0%	10.9%	12.6%	13.3%	12.7%c

Source: California Department of Education, Education Demographics Unit

Table 8 –Crime Rates Remain Low, But Property Crime Rates More Variable (Page 8)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Violent Crimes	789	726	832	767	642	580	481	554	495	511
Per 1,000 Population	3.29	2.98	3.40	3.11	2.57	2.33	1.93	2.21	1.97	2.02
Annual Change	-4.4%	-9.4%	14.1%	-8.5%	-17.4%	-9.3%	-17.2%	14.6%	-11.0%	2.6%
Property Crimes	3,477	3,472	3,247	2,829	2,880	3,500	3,195	3,622	3,445	3,668
Per 1,000 Population	14.52	14.27	13.25	11.47	11.51	14.06	12.83	14.47	13.70	14.54
Annual Change	-14.2%	-1.7%	-7.1%	-13.5%	0.4%	22.1%	-8.8%	12.8%	-5.3%	6.1%

Source: California Department of Justice, Criminal Justice Profile

Table 9 – Juvenile Crime Rates Vary, Misdemeanor Rates Higher Than State Average (Page 9)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Misdemeanor Charges	1,239	1,204	1,102	1,162	1,042	1,033	1,054	1,220	1,153	1,171
Per 1,000 Population	58.4	54.5	51.7	53.3	46.3	44.7	44.2	50.6	49.5	50.22
Annual Change	-9.2%	-6.8%	-5.0%	3.0%	-13.1%	-3.4%	-0.9%	14.2%	-2.1%	.01%
Felony Charges	366	333	313	368	285	293	259	258	259	299
Per 1,000 Population	17.3	15.1	14.7	16.9	12.7	12.7	10.9	10.7	11.1	12.82
Annual Change	-4.5%	-12.7%	-2.5%	14.9%	-25.0%	0.1%	-14.2%	-1.7%	4.0%	15.3%
Violent Crimes	101	70	75	71	62	79	60	81	62	86
Per 1,000 Population	4.8	3.2	3.5	3.3	2.8	3.4	2.5	3.4	2.7	3.69
Annual Change	16.5%	-33.5%	11.2%	-7.5%	-15.4%	24.1%	-26.3%	33.2%	-20.7%	38.5%
Property Crimes	162	166	156	202	150	147	119	101	127	83
Per 1,000 Population	7.6	7.5	7.3	9.3	6.7	6.4	5.0	4.2	5.5	3.56
Annual Change	-27.8%	-1.7%	-2.5%	26.5%	-28.1%	-4.5%	-21.4%	-16.3%	30.3%	-34.7%

Source: California Department of Justice, Criminal Justice Profile

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
Belvedere	89.7%	83.3%	87.7%	90.7%
Corte Madera	87.4%	81.6%	87.0%	89.1%
Fairfax	86.2%	77.3%	84.4%	89.4%
Larkspur	87.7%	82.2%	86.6%	89.3%
Mill Valley	87.3%	80.9%	85.9%	90.1%
Novato	86.2%	77.2%	83.7%	87.1%
Ross	92.5%	80.4%	85.8%	88.5%
San Anselmo	86.8%	79.8%	86.6%	89.7%
San Rafael	85.9%	78.8%	83.4%	87.9%
Sausalito	85.2%	75.9%	80.8%	87.9%
Tiburon	87.3%	79.5%	85.2%	89.9%
Unincorporated	85.7%	79.8%	85.3%	88.9%
Marin County	**86.4%**	**79.2%**	**84.6%**	**89.5%**
California	75.3%	65.5%	71.0%	76.0%
United States	90.0%	82.3%	85.5%	88.5%
Percentage of Eligible Voters Registered to Vote				
Marin County	**87%**	**84%**	**79%**	**88%**
California	72%	806%	73%	75%
United States	68%	66%	64%	66%

Sources: Marin County Registrar of Voters, California Secretary of State, Bureau of the Census

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

2005	Total Personal Income	Net Earnings	Transfer Payments	Income Maintenance	Unemployment Insurance	Retirement	Dividends, Interest/Rent
Marin	$75,884	$50,679	$4,578	$258	$118	$3,176	$18,212
Bay Area	$50,057	$36,396	$4,558	$477	$143	$1,694	$9,103
California	$36,963	$26,149	$4,732	$645	$125	$1,545	$6,055
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	$2,691	$14,231
Marin 1995	$44,608	$29,429	$2,794	$217	$77	$2,500	$12,385

Source: U.S. Department of Commerce, Bureau of Economic Analysis

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

	2000	2005	2010	2015	2020	2025	2030	2035
Marin	$112,500	$113,700	$120,100	$127,000	$133,500	$140,300	$147,500	$166,800
Bay Area	$92,500	$89,100	$94,800	$101,200	$107,000	$113,000	$118,700	$133,100
Difference	$20,000	$24,600	$25,300	$25,800	$26,500	$27,300	$28,800	$33,700

Source: Association of Bay Area Governments, Projections 2007
Note: Figures are in constant 2000 dollars.

Table 13 – Household Occupancy to Remain Relatively Constant Over the Long Term (Page 13)

Persons Per Household	2000	2005	2010	2015	2020	2025	2030	2035
Marin County	2.34	2.32	2.34	2.37	2.36	2.35	2.34	2.32
Bay Area	2.69	2.69	2.70	2.70	2.70	2.70	2.70	2.69
Difference	0.35	0.37	0.36	0.33	0.34	0.35	0.36	.37

Source: Association of Bay Area Governments, Projections 2007

Table 14 – New Housing Units Added Slowly, but Multifamily Share of Housing Stock on the Rise (Page 14)

	1998	1999	2000	2001	2002	2003	2004	2005	2006
Single-Family Detached	63,383	63,655	63,687	64,017	64,353	64,863	65,278	65,278	65,516
Condos, Townhomes	8,354	8,390	8,455	8,459	8,460	8,572	8,593	8,593	8,586
Apartments	30,595	30,727	30,729	30,731	30,887	31,265	31,480	31,480	31,507
Mobile Homes	2,088	2,097	2,123	2,128	2,129	2,131	2,131	2,131	2,131
Total	104,420	104,869	104,994	105,335	105,829	106,831	107,482	107,482	107,740

Source: California Department of Finance, Demographic Research Unit

Table 15 – High Percentage of Incomes Spent on Rent, New Unit Construction Falls Behind (Page 15)

Percentage of Income Spent on Rent	1980 Number	1980 Percent	1990 Number	1990 Percent	2000 Number	2000 Percent
Less than 20%	10,009	29.9%	7,852	22.1%	9,745	26.9%
20-24%	5,065	14.6%	4,752	13.4%	4,532	12.5%
25-29%	3,397	9.8%	4,357	12.2%	4,530	12.5%
30-34%	3,179	9.2%	3,571	10.0%	3,189	8.8%
35% or More	10,865	31.4%	13,109	36.9%	12,565	34.7%
Not Computed	2,067	6.0%	1,932	5.4%	1,660	4.6%
Total Units	34,582		35,573		36,221	
Mean Rent	$391		$863		$1,162	

Source: Bureau of the Census, Census of Population

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

	1999	2000	2001	2002	2003	2004	2005	2006	2007
One Bedroom Units	$1,125	$1,445	$1,345	$1,204	$1,130	$1,139	1,284	1,338	1,386
Two Bedroom Units	$1,215	$1,612	$1,698	$1,561	$1,449	$1,405	1,400	1,448	1,523

Source: Marin Sonoma Market Update

Table 17 – Need for Housing Assistance Continues, but Key Areas of Need Shift (Page 17)

	1999	2000	2001	2002	2003	2004	2005	2006
New client calls to Housing Assistance Line	7,581	4,216	3,214	4,063	5,547	7,548	4,159	4,043

Frequency of Requests for Information on:					
	2002	2006		2002	2006
Affordable or Low Cost Housing	46%	42%	Housing Search Assistance	7%	42%
Rent Deposits or Back Rent	16%	1%	Support Services	8%	62%
Landlord/Tenant Issues	7%	1%	Emergency Shelter/Transitional Housing	3%	0%
Shared Housing	5%	0%	Section 8 Waiting List Status	14%	15%

Source: Marin Housing Authority

Table 18 – Home Sales Prices Continue to Climb While Overall Sales Bounce Back (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	$223,896
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
Average	4,016	$721,824	$585,375	1,818	2,930	$840,560	$670,100	1,086	$411,302	$377,490

Source: Marin County Assessor

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

	1996	1998	2000	2002	2004	2005	Net Change
Marin Jobs	102,500	106,700	111,700	111,700	110,500	109,200	2,500
Marin Housing Units	103,271	104,420	104,994	105,829	107,482	107,482	3,062
Employed Marin Residents	128,800	132,800	142,000	135,100	130,200	125,600	-4,100

Source: Bay Area Council, Association of Bay Area Governments

Table 20 – Per Capita, Total Vehicle Miles Traveled on the Rise (Page 20)

Daily Average	1995	2000	2005	2010	2015	2020	2030
Total Miles Traveled (millions)	5.43	6.80	6.83	7.48	8.12	8.32	7.41
Per Capita Miles Traveled	27.8	36.3	32.9	35.1	37.6	38.0	34.8
Driving Age Population	195,392	187,563	207,782	213,370	216,052	218,736	212,932

Source: Marin County Department of Public Works

Table 21 – Vehicles Registered in Marin Increasing and Outnumber Driving Age Population (Page 21)

	1998	1999	2000	2001	2002	2003	2004	2005	2006
Autos/SUV's	175,646	166,473	168,891	180,953	184,025	178,628	186,832	182,120	185,444
Trucks/Pickups	39,869	31,693	31,966	34,628	35,130	33,914	35,179	33,770	34,400
Motorcycles	4,697	4,533	4,896	5,633	6,097	6,041	6,488	6,624	6,928
Trailers	11,436	11,388	11,562	14,465	14,437	14,129	15,000	15,531	15,706
Total	225,648	214,087	217,315	235,679	239,689	232,712	243,499	238,045	242,478

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**	**88,328**	**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	3,493	9,594	15,352	18,336	22,674
Total To/From Bay Area	48,473	50,329	46,412	55,478	17,584	30,650	42,197	47,294
Total To/From Outside Bay Area	191	237	1,553	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 Employee/Marin Resident Worker Ratio	1.37	1.19	1.03	1.06

Source: Census, 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
Daily Hours Lost from Congestion	4,900	6,300	7,200	7,700	9,900	7,900	8,400	6,200	7,410	9,800

Source: Caltrans, District 4, Office of Highway Operations
Note: Survey was not conducted in 1997

Table 24 – Vehicle Emissions Levels Show Substantial Improvement But Carbon Dioxide is Up (Page 25)

In Tons	1997	1998	1999	2000	2001	2002	2003	2004	2005
Carbon Dioxide	1,183,622	1,200,251	1,229,597	1,244,270	1,256,987	1,259,921	1,246,226	1,183,622	1,230,576
Carbon Monoxide	39,870	40,737	34,804	32,595	32,718	30,946	27,731	26,586	25,042
Hydrocarbons	4,162	4,239	3,609	3,365	3,376	3,191	2,858	2,738	2,573
Nitrogen Oxide	5,695	5,943	5,200	5,004	5,111	4,930	4,518	4,446	4,296

Source: California Air Resources Board, U.S. Department of Energy
Note: For Carbon Monoxide, Hydrocarbons, and Nitrogen Oxide, benchmark study years are 1995, 2000, and 2004. Intervening year data is derivative of benchmark year data multipliers and vehicle registrations by type.

Table 25 – Vehicles Account for Vast Majority of Airborne Pollutant Sources in Marin (Page 26)

Source Share 2005	Carbon Monoxide	Nitrogen Oxide	Particulate Matter	Reactive Organic Gases
Area Wide	10%	5%	84%	19%
On-Road Mobile	66%	55%	4%	42%
Other Mobile	24%	24%	9%	26%
Stationary	0.1%	0%	3%	13%
Total Tons Per Day	1999	2000	2002	2004
Carbon Monoxide (CO)	150.8	141.9	115.8	110.5
Nitrogen Oxide (NOx)	19.1	18.3	21.3	19.3
Particulate Matter (PM10)	7.3	7.3	7.7	7.8
Reactive Organic Gases	24.4	23.3	19.9	18.7

Source: California Air Resources Board

Table 26 – Total Fuel Consumption Is Increasing (Page 28)

Total Vehicle Fuel Consumption	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Marin (Million Gallons)	117.5	119.2	121.0	122.7	125.7	127.2	128.5	128.8	127.4	121.0
Per Vehicle Consumption (Gallons)										
Marin	N/A	566.2	602.0	606.7	620.1	618.4	581.0	571.9	583.0	529.6
Bay Area	N/A	N/A	636.8	609.6	614.6	597.3	607.3	587.9	509.8	536.4
California	N/A	N/A	579.4	551.9	553.5	537.5	539.2	527.4	531.5	501.4

Source: Caltrans Transportation Planning Program

Table 27 – Marin Waste Diversions Far Exceed Disposal, But Generation Rate is Up (Page 29)

In Tons	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Generated	387,855	399,981	525,336	547,544	548,457	649,113	580,865	678,388	747,979	731,181
Disposed	224,561	227,779	256,403	229,964	216,211	234,511	202,078	228,786	225,028	237,146
Diverted*	143,294	172,202	268,933	317,580	332,246	414,602	378,787	449,602	522,951	494,035
Waste Exported**	4,654	2,966	13,128	43,799	35,471	32,879	23,485	39,191	57,090	
Waste Imported**	49,511	69,350	33,510	187,577	198,510	175,369	192,045	170,269	180,995	

Source: Marin County Hazardous and Solid Waste Management Authority
Notes: * Curbside recycling, buy-back, composted, inerts diverted, alternative daily cover, but excluding biomass
** Material, sludge (wet tons)

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

Electricity Generation Share	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Hydroelectric	18.9%	16.2%	17.6%	15.1%	14.8%	9.4%	11.5%	13.1%	11.9%	13.8%
Nuclear	15.7%	14.6%	15.1%	14.7%	15.3%	12.6%	12.6%	12.9%	10.5%	12.6%
Coal	10.0%	10.6%	12.5%	13.2%	13.0%	10.4%	10.2%	9.9%	9.9%	9.8%
Oil	0.3%	0.1%	0.0%	0.0%	0.2%	0.5%	0.2%	0.0%	0.0%	0.0%
Natural Gas	26.3%	29.1%	29.7%	30.7%	37.6%	42.7%	33.5%	33.2%	36.2%	33.4%
Geothermal	5.3%	4.7%	4.5%	4.8%	4.7%	5.1%	5.1%	5.0%	4.8%	4.9%
Organic Waste	2.2%	2.2%	1.9%	2.1%	2.1%	2.3%	2.3%	2.1%	2.0%	2.1%
Wind	1.2%	1.1%	1.0%	1.2%	1.3%	1.2%	1.3%	1.2%	1.5%	1.4%
Solar	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.2%
Imported	19.6%	20.7%	17.2%	17.9%	10.7%	15.4%	23.1%	22.3%	22.9%	21.7%
Renewable (excl. Imports)	28.0%	24.5%	24.4%	23.5%	23.2%	21.8%	26.6%	27.9%	26.6%	28.84%
Nonrenewable (excl. Imports)	72.0%	75.5%	75.6%	76.5%	76.8%	78.2%	73.4%	72.1%	73.4%	71.16%

Source: California Energy Commission

Table 29 – Residential Per Capita Water Consumption Declining, Non-Residential Using More (Page 32)

Acre Feet	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Residential	27,170	29,179	27,053	29,477	29,464	29,102	28,685	28,236	28,154	26,747
Nonresidential	6,866	7,554	6,670	6,971	8,106	10,487	9,824	10,707	10,690	8,997
Cubic Feet										
Consumption per Residence	4,849	5,221	4,931	5,325	5,299	5,232	5,205	5,071	4,966	4,718

Sources: Marin Municipal Water District, North Marin Water District

Table 30 – Energy Crisis Has Tempering Effect, But Long-Term Consumption Increases (Page 33)

Annual Kilowatt Hours	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Per Dwelling Unit	6,514	6,774	6,948	6,940	6,244	6,399	6,540	6,558	6,560	6,700
Per Commercial Meter	51,914	50,486	52,450	53,853	48,812	48,208	50,329	48,119	48,030	48,548

Source: California Energy Commission, Pacific Gas and Electric

Table 31 – Agriculture Production Declines Overall, But is in Recovery (Page 34)

Production Value (x1000)	1998	1999	2000	2001	2002	2003	2004	2005
Livestock Products	$38,655	$33,907	$27,456	$30,397	$23,782	$25,137	$33,244	$31,282,329
Livestock and Poultry	$8,331	$10,491	$11,311	$10,552	$10,104	$12,837	$11,126	$10,631,673
Field and Orchard Crops	$6,949	$7,170	$7,158	$7,668	$7,468	$7,525	$7,011	$6,954,533
Aquaculture Products	$1,549	$1,266	$1,450	$1,608	$2,398	$2,492	$2,853	$3,264,910
Nursery Crops	$683	$707	$814	$674	$725	$685	$663	$689,091
Total	$56,167	$53,542	$48,189	$50,900	$44,477	$48,675	$54,897	$52,822,536

Source: Marin County Department of Agriculture

Table 32 – Significant Organic Production Gains, But Production Value Not Keeping Pace (Page 35)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Total Acres in Production	184	312	385	396	357	810	1,560	2,330	4,888	11,300
Registered Growers	28	29	28	26	28	23	24	33	34	38
Gross Production (millions)	$3.3	$3.1	$3.2	$3.4	$3.2	$3.3	$3.9	$4.0	$3.6	$4.2

Source: Marin County Department of Agriculture

Table 33 – Taxable Sales Growth Follows Economic Trends, But Marin Less Volatile Than Bay Area

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

	Taxable Sales		Sales Per Establishment			Per Capita Sales		
Year	Taxable Sales (000)	% Change	Establishments	Sales Per Establishment	% Change	Sales Per Capita	% Change	Inflation Adjusted % Change
1994	$1,879,802	3.7%	2,988	$629,117	3.6%	$7,920	3.1%	1.5%
1995	$1,939,316	3.1%	3,020	$642,158	2.1%	$8,142	2.8%	0.8%
1996	$2,061,445	6.3%	2,996	$688,066	7.1%	$8,616	5.8%	3.2%
1997	$2,227,459	8.1%	3,045	$731,514	6.3%	$9,227	7.1%	2.9%
1998	$2,394,890	7.5%	3,165	$756,679	3.4%	$9,738	5.5%	2.3%
1999	$2,665,857	11.3%	3,258	$818,250	8.1%	$10,752	10.4%	6.2%
2000	$2,958,289	11.0%	3,396	$871,110	6.5%	$11,963	11.3%	-5.8%
2001	$2,904,420	-1.8%	3,450	$841,861	-3.4%	$11,725	-2.0%	-5.5%
2002	$2,864,129	-1.4%	3,662	$782,122	-7.1%	$11,587	-1.2%	-2.6%
2003	$2,900,754	1.3%	3,944	$735,485	-6.0%	$11,761	1.5%	0.4%
2004	$3,074,343	6.0%	4,105	$748,926	1.8%	$12,501	6.3%	1.3%
2005	$3,165,743	3.0%	4,237	$747,166	-0.2%	$12,819	2.5%	1.3%
Change 1994-2005	**$1,285,941**	**68.4%**	**1,249**	**$118,049**	**18.8%**	**$4,898**	**61.8%**	**31.9%**

Source: State Board of Equalization, Taxable Sales in California

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

	Taxable Sales		Sales Per Establishment			Per Capita Sales		
Year	Taxable Sales (000)	% Change	Establishments	Sales Per Establishment	% Change	Sales Per Capita	% Change	Inflation Adjusted % Change
1994	$2,564,628	4.1%	12,059	$212,673	2.6%	$10,806	3.5%	1.9%
1995	$2,686,020	4.7%	12,196	$220,238	3.6%	$11,277	4.4%	2.4%
1996	$2,902,225	8.0%	12,010	$241,651	9.7%	$12,130	7.6%	5.0%
1997	$3,108,231	7.1%	11,678	$266,161	10.1%	$12,875	6.1%	1.9%
1998	$3.378,233	8.7%	11,429	$295,584	11.1%	$13,737	6.7%	3.5%
1999	$3,670,921	8.7%	11,200	$327,761	10.9%	$14,806	7.8%	3.6%
2000	$4,056,025	10.5%	11,076	$366,199	11.7%	$16,402	10.8%	5.3%
2001	$3,950,152	-2.6%	11,020	$358,453	-2.1%	$15,947	-2.8%	-6.3%
2002	$3,848,444	-2.6%	11,007	$349,636	-2.5%	$15,569	-2.4%	-3.8%
2003	$3,891,300	1.1%	11,133	$349,528	0.0%	$15,778	1.3%	0.2%
2004	$4,053,515	4.2%	11,080	$365,841	4.7%	$16,482	4.5%	1.3%
2005	$4,171,444	2.4%	11,138	$374,524	2.4%	$16,891	2.5%	1.3%
Change 1994-2005	**$1,606,816**	**62.7%**	**-921**	**$161,850**	**76.1%**	**$6,085**	**56.3%**	**31.9%**

Source: State Board of Equalization, Taxable Sales in California

Table 34 – Assessed Valuation Increases Sharply, Even With Proposition 13 Cap (Page 37)

($ Millions)	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Secured Roll							
Land	$11,420	$12,286	$14,482	$15,745	$17,170	$18,870	$21,002
Improvements	$16,227	$17,557	$18,938	$20,137	$21,239	$22,427	$23,937
Personal Property	$74	$79	$97	$86	$107	$99	$106
Unsecured Roll							
Land	$71	$78	$79	$80	$78	$81	$82
Improvements	$440	$490	$525	$576	$614	$629	$650
Personal Property	$634	$689	$753	$766	$758	$756	$755
Total Net	$27,804	$30,625	$33,662	$36,120	$38,664	$41,381	$45,062

Source: State Controller

Table 35 – Significant Office Construction Occurs, But Little New Retail and Industrial Space (Page 38)

Square Feet	Total	Office	Retail	Industrial
1995	694,793	633,940	60,853	0
1996	382,599	39,252	317,420	25,927
1997	438,563	229,753	134,460	74,350
1998	261,576	83,109	65,087	113,380
1999	866,068	728,960	43,925	93,183
2000	625,470	511,417	31,613	82,440
2001	685,507	556,814	31,207	97,486
2002	613,358	473,118	71,118	69,122
2003	625,520	494,482	29,019	102,019
2004	252,327	211,200	2,180	38,947
2005	54,564	5,300	9,883	39,381
2006	12,413	12,413	0	0
Total	5,512,551	3,979,558	796,765	736,235
Annual Average	459,380	331,630	66,397	61,353

Source: Marin County Community Development Agency, PropDev

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

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Office	10.8%	8.5%	5.9%	2.5%	3.0%	21.9%	20.2%	17.7%	17.2%	15.6%
Retail	5.6%	2.8%	3.1%	3.5%	2.1%	2.3%	3.5%	3.9%	3.3%	3.1%
Industrial	3.9%	3.4%	2.6%	0.9%	2.2%	1.5%	2.8%	4.0%	4.2%	4.7%

Source: Orion Partners

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

	1980		1990		2000		1980-2000
Category	Employed Residents	% of Total	Employed Residents	% of Total	Employed Residents	% of Total	% Change in Employment
Management, Professional and Related	47,416	40.6%	57,963	46.0%	67,674	52.5%	42.7%
Service Occupations	13,617	11.7%	12,250	9.7%	15,446	12.0%	13.4%
Sales and Office Occupations	36,885	31.6%	37,193	29.5%	31,867	24.7%	-13.6%
Farming, Fishing, and Forestry	1,772	1.5%	1,963	1.6%	374	0.3%	-78.9%
Construction, Extraction, Maintenance	9,816	8.4%	8,920	7.1%	7,706	6.0%	-21.5%
Production, Transportation, Material Moving	7304	6.3%	7,597	6.0%	5,788	4.5%	-20.8%
Total	116,810		125,886		128,855		10.3%

Sources: Bureau of the Census, Census of Population 1980, 1990, 2000 (1980 & 1990 data compiled to fit 2000 categories) & Department of Labor

Table 38 – Marin Unemployment Remains Low (Page 43)

	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%
Average	3.3%	4.6%	6.1%	5.0%

Source: Employment Development Department, Labor Market Information Division

Table 39 – Public Employment Remains Stable, Number of Agencies Varied (Page 44)

39A – Federal

Year	1997	1998	1999	2000	2001	2002	2003	2004
Agencies	44	37	37	38	40	40	38	37
Employees	1,069	1,045	1,061	1,094	974	977	958	928
Average Annual Wage	$42,255	$43,609	$43,323	$43,635	$47,008	$48,435	$48,845	$54,367

Source: Employment Development Department, Labor Market Information Division

39B – State

Year	1997	1998	1999	2000	2001	2002	2003	2004
Agencies	45	46	46	42	42	42	42	46
Employees	2,101	1,702	1,723	1,770	1,747	1,783	1,798	1,849
Average Annual Wage	$32,056	$29,583	$30,671	$33,993	$36,560	$35,236	$36,828	$38,542

Source: Employment Development Department, Labor Market Information Division

39C – Local

Year	1997	1998	1999	2000	2001	2002	2003	2004
Agencies	59	61	60	57	57	58	59	61
Employees	5,165	5,177	5,265	5,310	5,540	5,788	5,728	5,592
Average Annual Wages	$42,197	$44,912	$45,870	$49,197	$50,215	$50,565	$54,172	$56,046

Source: Employment Development Department, Labor Market Information Division

39D – Public Education

Year	1997	1998	1999	2000	2001	2002	2003	2004
Agencies	23	102	116	120	123	120	113	111
Employees	5,035	5,162	5,265	5,271	5,351	5,424	5,054	5,131
Average Annual Wage	$29,252	$30,267	$31,305	$33,370	$35,873	$36,630	$39,471	$39,570

Source: Employment Development Department, Labor Market Information Division

Table 40 – High Tech Retreats to 1994 Employment Levels, Wages Have Stabilized (Page 45)

Employment	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Software/Internet	5,256	5,651	5,891	5,873	6,027	6,081	4,762	4,157	3,731	3,343
Hardware/Peripherals	621	769	722	495	448	381	217	75	82	77
Total	5,877	6,420	6,613	6,368	6,475	6,462	4,979	4,232	3,813	3,511
Mean Wage	$61,129	$65,096	$74,191	$77,491	$86,286	$83,020	$80,417	$87,601	$124,165	$145,578

Sources: Census, Employment Development Department, Association of Bay Area Governments

Cluster Focus

Table 41 – Marin County Employment (Page 46)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	9,100	9,131	9,154	9,211	9,167	9,046
20-100	800	856	958	904	887	864
More than 100	131	144	144	142	129	130
Establishments	10,031	10,131	10,256	10,257	10,183	10,040
Employees	97,596	101,281	109,012	106,275	102,449	103,386
Payroll (000)	$3,566,316	$3,876,847	$4,540,570	$4,388,031	$4,366,317	$4,673,351
Mean Wage	$36,542	$38,278	$41,652	$41,289	$42,619	$45,203

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	242	347	250	260	247	243
20-100	45	42	43	45	37	42
More than 100	12	15	17	11	12	11
Establishments	299	404	310	316	296	296
Employees	7,518	7,703	7,842	7,658	6,550	6,633
Payroll (000)	$508,610	$569,211	$640,664	$605,385	$538,150	$543,660
Mean Wage	$67,652	$73,895	$81,697	$79,053	$82,160	$81,962

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	485	488	490	552	568	603
20-100	20	20	26	29	24	22
More than 100	3	3	2	1	1	2
Establishments	508	511	518	582	593	627
Employees	2,718	2,773	2,761	2,799	2,761	3,272
Payroll (000)	$90,231	$92,702	$98,554	$106,539	$105,079	$147,343
Mean Wage	$33,198	$33,430	$35,695	$38,063	$38,058	$45,031

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	572	591	606	596	652	663
20-100	25	34	27	37	37	38
More than 100	9	9	9	9	11	11
Establishments	606	634	642	642	700	712
Employees	6,879	7,479	7,749	8,473	8,097	8,465
Payroll (000)	$473,923	$510,212	$590,159	$646,683	$676,341	$747,528
Mean Wage	$68,894	$68,219	$76,159	$76,323	$83,530	$88,308

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	1,624	1,646	1,713	1,710	1,755	1,715
20-100	72	81	81	87	75	61
More than 100	5	6	9	12	8	7
Establishments	1,701	1,733	1,803	1,809	1,838	1,783
Employees	8,112	9,035	9,578	9,966	9,236	8,443
Payroll (000)	$431,060	$505,893	$625,770	$618,766	$546,490	$522,033
Mean Wage	$53,139	$55,993	$65,334	$62,088	$59,170	$61,380

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	31	33	26	31	46	39
20-100	14	13	16	17	22	16
More than 100	3	3	3	5	2	4
Establishments	48	49	45	53	70	59
Employees	1,192	1,339	1,264	1,579	1,284	1,461
Payroll (000)	$76,810	$80,496	$88,027	$104,134	$94,858	$119,107
Mean Wage	$64,438	$60,117	$69,642	$65,949	$73,877	$81,524

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	477	491	504	500	443	429
20-100	51	58	59	64	50	53
More than 100	10	11	13	13	9	12
Establishments	538	560	576	577	502	494
Employees	5,618	6,244	6,878	7,489	6,521	9,594
Payroll (000)	$154,332	$184,991	$233,876	$247,973	$214,775	$248,252
Mean Wage	$27,471	$29,627	$34,003	$33,112	$32,936	$25,815

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	148	148	151	146	149	126
20-100	23	22	25	27	22	22
More than 100	7	7	8	10	9	8
Establishments	178	177	184	183	180	176
Employees	2,584	2,788	4,306	4,574	3,695	3,109
Payroll (000)	$69,258	$71,884	$91,240	$102,565	$105,144	$106,058
Mean Wage	$26,803	$25,783	$21,189	$22,423	$28,466	$34,113

Source: Bureau of the Census, County Business Patterns

41 H – Industry Cluster: Manufacturing (Page 55)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	295	287	275	270	253	240
20-100	34	32	30	33	22	25
More than 100	8	10	9	9	4	1
Establishments	337	329	314	312	279	266
Employees	4,731	4,227	3,923	3,750	2,609	2,300
Payroll (000)	$181,789	$160,800	$147,106	$144,310	$110,919	$94,746
Mean Wage	$38,425	$38,041	$37,498	$38,483	$42,514	$41,194

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	542	516	496	476	473	456
20-100	26	29	33	37	37	34
More than 100	5	6	5	5	2	3
Establishments	573	551	534	518	512	493
Employees	4,011	4,179	4,056	4,179	3,549	3,709
Payroll (000)	$185,344	$191,938	$221,956	$217,001	$206,386	$232,836
Mean Wage	$46,209	$45,929	$54,723	$51,927	$58,153	$62,776

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	1,088	1,083	1,066	1,059	1,069	1,019
20-100	143	145	159	157	149	145
More than 100	21	22	20	25	30	26
Establishments	1,252	1,250	1245	1,245	1,248	1,190
Employees	14,412	14,737	16,407	16,385	16,074	15,798
Payroll (000)	$341,754	$387,903	$435,000	$439,389	$438,737	$440,700
Mean Wage	$23,713	$26,322	$26,513	$26,817	$27,295	$27,896

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	562	539	525	519	515	532
20-100	141	149	158	156	157	154
More than 100	7	6	6	3	4	3
Establishments	710	694	689	678	676	689
Employees	10,140	10,314	10453	10208	10,544	10,103
Payroll (000)	$138,990	$148,817	$171,848	$161,487	$169,935	$164,645
Mean Wage	$13,707	$14,429	$16,440	$15,820	$16,117	$16,346

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	933	901	882	880	943	953
20-100	75	72	74	81	86	87
More than 100	24	28	23	22	22	20
Establishments	1,032	1,001	979	983	1,051	1,060
Employees	14,026	13,414	12,826	12,704	13,284	13,102
Payroll (000)	$428,133	$400,179	$408,906	$454,166	$492,801	$518,502
Mean Wage	$30,524	$29,833	$31,881	$35,750	$37,097	$39,574

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	182	179	188	190	200	210
20-100	22	32	26	28	31	26
More than 100	3	1	2	2	2	5
Establishments	207	212	216	220	233	241
Employees	2,203	2,209	2,235	2,382	2,501	2,716
Payroll (000)	$51,680	$58,733	$59,076	$66,231	$75,456	$78,073
Mean Wage	$23,459	$26,588	$26,432	$27,805	$30,170	$28,746

Source: Bureau of the Census, County Business Patterns

41 N – Industry Cluster: Construction (Page 61)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	951	952	990	984	977	9545
20-100	44	56	76	80	69	76
More than 100	6	9	9	11	8	9
Establishments	1,001	1,017	1,075	1,075	1,054	1,039
Employees	5,815	6,892	8,254	9,110	8,498	8,375
Payroll (000)	$233,977	$296,208	$355,691	$385,469	$365,931	365,418
Mean Wage	$40,237	$42,979	$43,093	$42,313	$43,061	$43,632

Source: Bureau of the Census, County Business Patterns

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

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	87	85	94	88	95	97
20-100	18	18	16	18	17	15
More than 100	2	2	3	2	1	2
Establishments	107	105	113	108	113	114
Employees	1,556	1,636	1,675	1,683	1,536	1,538
Payroll (000)	$44,640	$49,417	$47,797	$53,399	$52,569	$60,432
Mean Wage	$28,689	$30,206	$28,536	$31,728	$34,225	$39,293

Source: Bureau of the Census, County Business Patterns

41 P – Industry Cluster: Motion Picture Production (Page 63)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	66	66	67	80	76	74
20-100	8	7	7	8	8	15
More than 100	3	6	4	4	4	3
Establishments	77	79	79	92	88	92
Employees	2,204	2,290	2,054	2,266	2,150	2,240
Payroll (000)	$162,243	$185,408	$209,993	$176,431	$219,371	$202,039
Mean Wage	$73,613	$80,964	$102,236	$77,860	$102,033	$90,195

Source: Bureau of the Census, County Business Patterns

41 Q – Industry Cluster: Repair & Maintenance (Page 64)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	270	264	267	266	257	246
20-100	20	21	20	19	20	15
More than 100	0	0	0	0	0	0
Establishments	290	285	287	285	277	261
Employees	1,696	1,872	1,860	1,825	1,730	1,511
Payroll (000)	$54,597	$59,569	$62,258	$65,675	$62,710	$60,944
Mean Wage	$32,192	$31,821	$33,472	$35,986	$36,249	$40,334

Source: Bureau of the Census, County Business Patterns

41 R – Industry Cluster: Personal Services (Page 65)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	223	212	214	202	205	199
20-100	7	13	12	13	10	11
More than 100	1	1	0	0	0	1
Establishments	231	226	226	215	215	211
Employees	1,278	1,346	1,289	1,293	1,195	1,414
Payroll (000)	$19,915	$22,081	$25,652	$24,243	$23,835	$34,499
Mean Wage	$15,583	$16,405	$19,901	$18,749	$19,946	$24,398

Source: Bureau of the Census, County Business Patterns

41 S – Industry Cluster: Religious, Civic & Professional Organizations (Page 66)

Employees per Establishment:	1998	1999	2000	2001	2002	2003
Less than 20	233	230	218	227	244	237
20-100	18	17	21	23	20	21
More than 100	2	2	3	2	2	3
Establishments	253	249	242	252	266	261
Employees	2,269	2,152	2,200	2,242	2,244	2,294
Payroll (000)	$43,384	$44,677	$48,693	$54,827	$57,460	$60,516
Mean Wage	$19,120	$20,761	$22,133	$24,455	$25,606	$26,380

Source: Bureau of the Census, County Business Patterns

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

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