

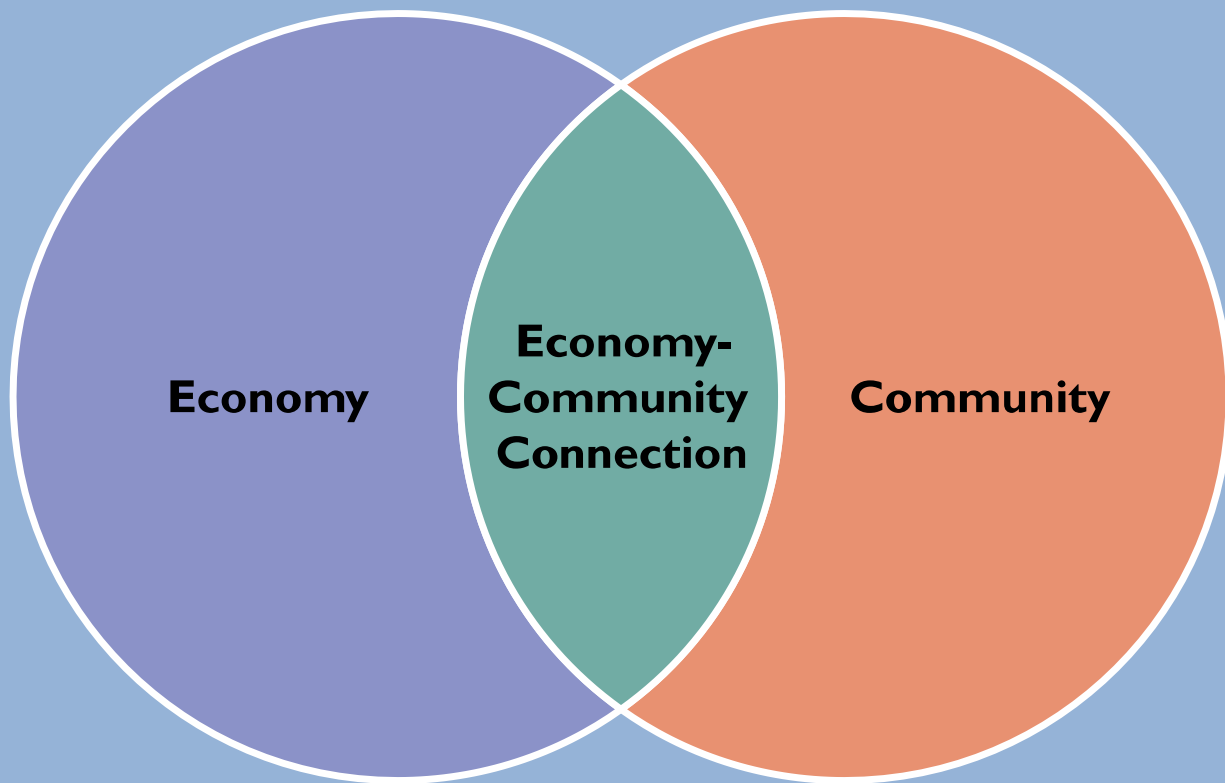


Solano County 2013

Index of Economic and Community Progress

County of Solano and Solano Economic Development Corporation

March 2014



Solano County 2013 Index of Economic and Community Progress

The *Solano County Index of Economic and Community Progress* is a project that was launched in 2007 after a series of economic summits identified a need for more fact-based information to guide efforts by leaders in both the public and private sectors to expand the long-term viability of the Solano County economy.

Three comprehensive editions were produced for 2008, 2009 and 2010 by the consultant Collaborative Economics for the County of Solano and the Solano Economic Development Corporation. These insightful documents provided an objective analysis of key indicators shaping the local economy.

In 2011, the Index became a project for County staff, in cooperation with the Solano EDC, to maintain and update throughout the year. The Index was expanded to include comparisons in many instances to the Sacramento Area, Bay Area, California and the United States. The 2012 and 2013 editions include the objective analysis of Dr. Robert Eyler from Economic Forensics and Analytics (www.econforensics.com).

All of the indexes, as well as several in-depth analyses of local industry clusters, can be found at www.solanocounty.com/economicindex.

It is our pleasure to introduce to you the sixth annual *Solano County Index of Economic and Community Progress*, an annual in-depth look at the various indicators and trends shaping our local economy. This Index documents reasons for optimism as more indicators convey that Solano County continues to emerge from the Great Recession.

Local industry employment, the “gross county product,” the housing market and government revenues are all making positive gains. At the same time, the sobering realities of the harsh economic downturn still linger and remind us that we have a significant way to go before the Great Recession is truly behind us.

The objective of the Index project since its inception has been to delve behind the headlines and gather the data that gives us a long-term perspective. This approach provided a context in which to view today’s circumstances and thoughtfully plan strategic actions to build our local economy. The 2013 Index continues this tradition, and the analysis is primarily focused on answering the question “How are we recovering?”

To answer this question and tell the story of Solano County’s economy, the types of indicators examined were expanded. The Index explores more affordability measures, which help define our quality of life and competitiveness to attract and retain business. New to this edition is the evaluation of many indicators down to the city level as well as comparisons between ourselves and neighboring regions that influence our local economic conditions.

This insightful document brings to forefront areas where collaborative efforts are needed to sustain a thriving economy that ensures our shared economic prosperity. It also reflects the changes happening around us. Some of these changes we have the ability to influence and grow our prosperity, while others we cannot control. The empirical data helps us identify the opportunities to make a difference. Our collaborative history affirms that we can make things happen once we know what needs to be done.

We challenge you to read this document with an eye to identifying ways in which you can commit to building upon our strengths and to address our challenges so that we can reach our positive vision of the future.

Sincerely,



Linda J. Seifert
Chair
Solano County Board of Supervisors



Sandy Person
President
Solano Economic Development Corp.

Table of Contents

- Solano County Key Facts4
- Index Overview.....5

Our Changing Economy

- Annual Local Industry Employment13
- Total Non-Farm Employment: Area Comparisons15
- Solano County Jobs by Industry, Percentage Change and Share of Total Jobs....16
- Unemployment Rates: Comparisons.....24
- Total Unemployed Residents25
- Total Employed Residents26
- Non-employers, 2007 to 2011.....27
- Percent of Non-employers and Types of Businesses29
- GDP change by sector.....30
- GDP Growth Comparisons.....32
- Personal Income.....33
- Personal Income Rates of Change34
- Sources of Personal Income35
- Median Household Income36
- Cities Overview.....37
- Economic Base and Locally-Serving Industries.....40
- Business Affordability: Wages42

Our Changing Community

- Population Growth45
- Population Growth Projections46
- Population Change by Age, Ethnicity and Gender: 2010-205047
- Dependency Ratios.....50
- Components of Population Change52
- Dropout Rates Compared to California and By Ethnicity53
- Graduation Rates and UC/CSU Ready Graduates by Ethnicity.....54
- Health Insurance Coverage56
- Median Home Prices58
- Foreclosure Activity and Notices of Default.....60
- Housing Affordability: Housing Prices Versus Median Household Income.....62
- City Overview: Demography, Housing and Incomes.....63
- Data Sources and Methodology65
- 2007 NAICS Industry Cluster Definitions.....67

Solano County Key Facts



Area

Rural land area	675 square miles
Urban land area	150 square miles
Water area	84 square miles

2013 Population (as of July 1)	423,265
Benicia	27,163
Dixon	18,449
Fairfield	108,207
Rio Vista	7,599
Suisun City	28,234
Vacaville	92,677
Vallejo	117,112
Unincorporated	18,946

2013 Population Change

Net Foreign Immigration	+1,193
Net Domestic Migration	+485

Top 5 Employment Sectors

Government	23,700
Education & Health Services	20,800
Retail Trade	18,700
Leisure & Hospitality	14,600
Professional & Business Services	9,200

Total Industry Jobs	127,300
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Adult Educational Attainment

Less than high school	13.3%
High school graduate	24.0%
Some college, no degree	28.6%
Associates degree	9.9%
Bachelor's degree	16.7%
Graduate or Professional degree	7.2%

Age Distribution

Under 5 years old	6.5%
5 to 19	20.8%
20 to 44	33.7%
45 to 64	27.7%
65 and older	13.4%

Ethnic Composition

White, non-Hispanic	40.8%
Hispanic	24.0%
Asian, non-Hispanic	14.6%
Black, non-Hispanic	13.9%
Other	6.7%

Sources:

1. Population data come from the California Department of Finance (www.dof.ca.gov)
2. Employment data come from the California Employment Development Department (www.edd.ca.gov)
3. Demographic data come from the Census' Bureau's American Community Survey (www.factfinder2.census.gov)

Index Overview

The past twelve months has seen a transformation of the California economy from the lingering effects of the recent recession into a recovered economy. Solano County is also showing signs of continued emergence from the long shadow cast by the housing and labor market downturns that ended the last decade. In past iterations of this index, there have been comparisons made to the pre-recession economy, from both the year 2000 and also from 1990 forward, as data were available.

The 2013 version of this Index shows focuses on 2013's economic data as compared to 2005 (pre-recession), 2007 (start of recession), 2010 (bottom of recession) and 2012 (prior year). Much like 1980 was very different than the year 2000 based on technological change, new industries, and changes in workforce composition, we should consider 1990 a distant memory in terms of the local economy. The year 2000 is also somewhat of a stretch. The economy in the year 2000 was at a peak built on new technologies that are now commonplace in our lives.

For Solano County, one aspect of the current economy that may remind us quickly of the last two decades is the housing market. 2013 was an extraordinary year in terms of the perfect, positive storm: strong financing conditions, availability of houses, and rising demand. Positive momentum in local home prices signals economic growth elsewhere in Solano County; for example, construction has made a comeback based on rising housing market prices. We see in the 2013 Index that local labor markets continued their recovery in Solano County, though still lagging somewhat in regional comparisons. Solano County hit bottom later than the Bay Area otherwise in terms of housing prices, labor markets, and income growth, but is now growing in earnest. 2014 looks like a year that Solano County continues to emerge from recession.

Local Industry Employment Continues Gains from 2012

Labor market growth in Solano County continues in similar industries as those that grew in 2012. The Bureau of Labor Statistics (BLS) and the California EDD (Employment Development Department) provide preliminary data through December 2013 and also official data through the second quarter of 2013. Since 2010, Solano County has grown jobs by 6.7 percent. The state of California has grown jobs since 2010 by 9 percent. From December 2012 to December 2013, Solano County's private sector saw growth of 3,600 jobs, while the public sector lost 300 jobs in 2013.

Health care remains a growth industry for Solano County, but even before the 2007-10 recession hit completely, health care was growing jobs. Growth in health care jobs sector from 2005 to 2013 is larger than any other sector. Construction has grown since 2010, slowing a bit in 2013, but continuing to recover. The public sector helped support some construction through federal and state projects early in the 2007-10 recession; new, private growth is coming from the private sector in 2012 and 2013. Retail jobs have made a comeback, walking hand-in-hand with American consumers who are also recovering and spending again. Jobs in hospitality, such as those in bars and restaurants, have also grown in 2013; these are signs that local residents are eating out more and that more tourism is coming to Solano County.

Gains and Losses of Jobs from 2005, 2007, 2010 and 2012 compared to 2013 Solano County Employment

Industry	2005	% Chg	2007	% Chg	2010	% Chg	2012	% Chg
Retail Trade	(1,500)	-7.4%	(600)	-3.1%	900	5.1%	900	5.1%
Bars and Restaurants	1,200	12.4%	400	3.8%	800	7.9%	800	7.9%
Health Care	4,100	32.3%	2,900	20.9%	1,700	11.3%	600	3.7%
Financial Activities	(900)	-14.3%	100	1.9%	100	1.9%	300	5.9%
Construction	(4,800)	-36.1%	(900)	-9.6%	1,100	14.9%	200	2.4%
Wholesale Trade	200	4.5%	500	12.2%	700	17.9%	100	2.2%
Food & Beverage Stores	100	3.2%	0	0.0%	300	10.3%	100	3.2%
Other Services	(100)	-2.4%	200	5.1%	600	17.1%	100	2.5%
Information (Software and Publishing)	(600)	-35.3%	(300)	-21.4%	(100)	-8.3%	0	0.0%
Local Government Education	(1,800)	-16.5%	(2,100)	-18.8%	400	4.6%	0	0.0%
Total Farm	(300)	-20.0%	(200)	-14.3%	100	9.1%	0	0.0%
Manufacturing	(400)	-3.8%	(500)	-4.8%	500	5.3%	0	0.0%
State Government Excluding Education	700	17.5%	100	2.2%	(100)	-2.1%	(200)	-4.1%
Federal Government	(500)	-12.2%	(300)	-7.7%	(900)	-20.0%	(300)	-7.7%
All Other Industries	(1,500)	-5.6%	(2,000)	-7.3%	1,900	8.1%	1,000	4.1%
Total, All Industries	(6,100)	-4.6%	(2,700)	-2.1%	8,000	6.7%	3,600	2.9%

Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information, December to December 2013

The “Information” sector, basically software development and publishing (books and newspapers), has shown more recovery in 2013. Financial Activities, industries that stretch from banks to insurance to real estate, have also continued to recover. Manufacturing based in Solano County made some progress since 2010, but 2013 was not much of a growth year for manufacturing jobs. In terms of structural change, the construction and local government continued to slowly emerge from the fading recession effects.

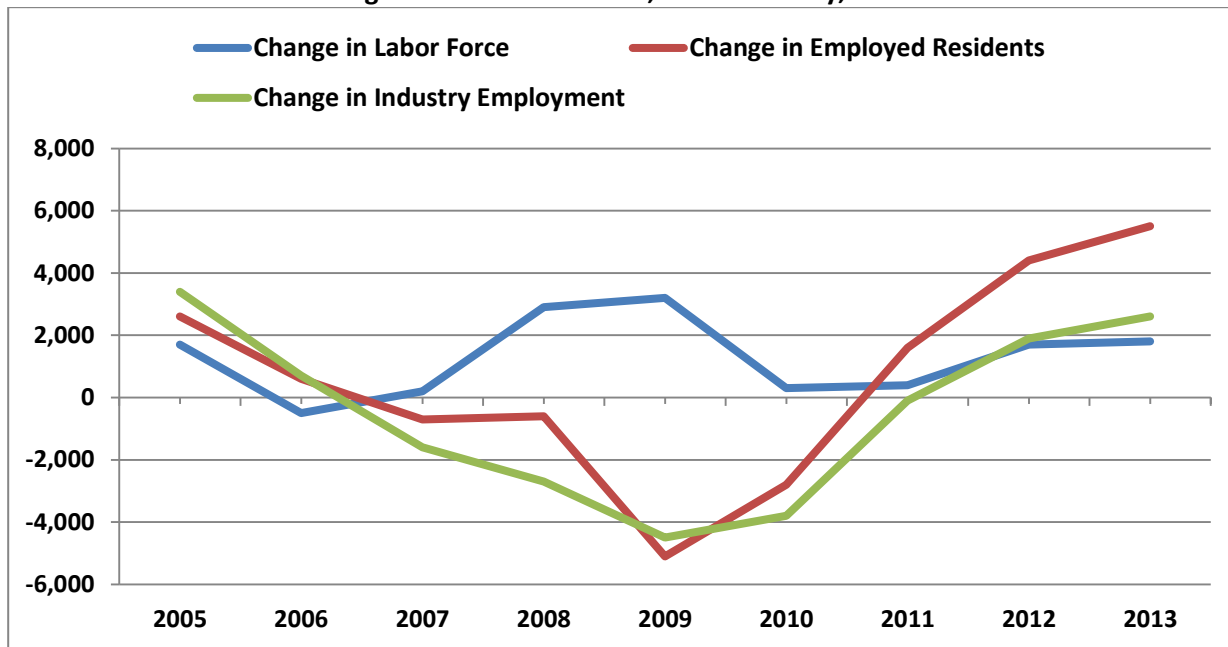
As we see later in this report, the rest of the Bay Area continued to grow in 2013, as did Sonoma and Napa counties (referred to here as the North Bay), and the Sacramento metropolitan area (Sacramento, Yolo, Sutter and Yuba counties).

Employment and the Labor Force: Solano County beginning to trend growth

When employment is rising, the labor force should rise more slowly or in sync with the employed. The change in the labor force remained positive while changes in employed residents and industry employment overall in Solano County was negative from 2007 to 2010. Unemployment rose quickly under these conditions. Once the change in the number of employed residents exceeds the change in the labor force, the unemployed are hired more quickly and the economy accelerates.

Solano County has seen growth of employed residents since 2010; over 11,700 more residents are working. Over 5,700 more residents are working since 2012. The labor force has grown by only 1,790 people since 2012, which suggests that Solano is now reducing the number of unemployed residents more and more. However, another 6,285 Solano residents still need to be employed to get the unemployment rate down to the 5.4% unemployment rate reported in 2005, based on the current size of the labor force.

Changes in Labor Force Data, Solano County, 2005-2013



Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information

Comparison of Labor Force Components, 2005 to 2013, Solano County
Number of Workers and Percentage Change in Each Component, Annual Averages

	<i>Labor Force Components</i>					<i>Percentage Change versus 2013</i>			
	<i>2005</i>	<i>2007</i>	<i>2010</i>	<i>2012</i>	<i>2013</i>	<i>2005</i>	<i>2007</i>	<i>2010</i>	<i>2012</i>
Labor Force	208,900	208,500	214,800	217,000	218,792	4.7%	4.9%	1.9%	0.8%
Employed Residents	197,600	197,500	189,000	195,000	200,700	1.6%	1.6%	6.2%	2.9%
Unemployment Residents	11,200	11,000	25,900	22,000	18,100	61.6%	64.5%	-30.1%	-17.7%
Industry Employment	130,800	129,900	118,900	120,700	123,625	-5.5%	-4.8%	4.0%	2.4%

Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information

Solano County and its Cities continue to grow since 2010 in terms of Gross Product

Economists like to use gross product data to measure a specific area’s ability to generate income for its residents and its businesses. Gross Domestic Product (GDP) is a common economic statistic; its growth rate is what we hear in the news as the “growth of the economy.” The Bureau of Economic Analysis (BEA) publishes “gross county product” (GCP) data for Solano County annually for the preceding year (2012 is currently the latest year available). This is the sum value of all final goods and services purchased within Solano County’s borders in one year when there is annual data stated. Economists use real values, where inflation is removed from the data. Since 2007, the Solano County economy lost productivity in real terms until 2011, where 2010 was a relatively flat year. The previous six years (2001 to 2006) were years of strong economic growth for Solano County, averaging 2.85 percent in real terms per year. The growth of Solano County in 2012 was over 4 percent, and Solano’s growth may be as large as 3.8 percent in 2013. Government (the public sector) has remained a relatively fixed percentage of Solano’s real GCP since 2005, at approximately 19 percent of the county economy. In 2007, private sector services accounted for 55.3 percent of Solano County’s economy; this fell to 51.7 percent in 2009. By 2012, private-sector employment was at 55.3 percent again. Construction, manufacturing and agriculture (goods-producing

industries) have gone from 22.7 percent in 2001 to 18.6 percent in 2006 to 18.8 percent in 2012. The size of Solano County’s real GDP has shrunk since 2005.

**Sector Shares of Gross Product in each of the Selected Areas
2005 to 2012 comparisons, Percent of Total Level of Gross Product**

Year	<i>Goods-Producing</i>			<i>Services-Producing</i>			<i>Public Sector</i>		
	CA	Solano	US	CA	Solano	US	CA	Solano	US
2005	17.9%	26.2%	19.9%	71.2%	55.1%	68.1%	11.0%	18.7%	12.0%
2007	18.0%	27.6%	19.7%	71.1%	53.2%	68.7%	10.8%	19.2%	11.6%
2010	17.0%	25.0%	18.5%	71.8%	55.3%	69.4%	11.1%	19.5%	12.1%
2012	16.6%	25.7%	18.7%	73.0%	55.3%	69.9%	10.3%	18.8%	11.5%

Source: Bureau of Economic Analysis (www.bea.gov)

Standards of Living: Three Measures

GDP per person is a classic measure of “standard of living”, where higher is better. Median household income is another measure, which can range from a single person living alone to a family of eight. Personal income per person is yet another measure. GDP per person (or per capita) is more of a measure of what the local area produces per person. Those who are commuting into Solano County every day go home with their wages and salaries; interest payments to lenders that are not headquartered in Solano County also remove some of that income. Below is a comparison of changes in living standards based on these measures from 2007, 2010 and 2011 as compared to 2012.

**Percentage Change in Standard of Living Measures,
Selected Areas, 2005, 2007 and 2010 Compared to 2012 (the latest data available), 2010 Dollars**

Place	<i>GDP/Capita</i>			<i>Personal Income/Person</i>			<i>Median Household Income</i>		
	2005	2007	2010	2005	2007	2010	2005	2007	2010
California	-2.4%	-5.4%	2.7%	0.9%	-2.4%	4.2%	-8.0%	-11.8%	-4.1%
Solano County	-7.8%	-7.4%	-1.9%	-4.7%	-7.0%	6.1%	-15.2%	-15.6%	-6.6%
United States	0.8%	-1.6%	2.6%	2.9%	-1.5%	3.0%	-6.2%	-9.3%	-2.9%

Sources: Bureau of Economic Analysis (www.bea.gov) and Census Bureau (factfinder2.census.gov)

Notice all areas have struggled since 2005 in 2010 dollars, though there has been nominal growth. GDP per capita has grown in California and the US since 2010, but is still lower in Solano County despite recent growth. Personal income per person has grown since 2010, and Solano County’s growth has outpaced the nation’s and state’s growth; personal income growth is outpacing population growth since 2010. Median household income remains lower since 2005, but recent, annual growth adds to signs that Solano County’s economy continues to improve.

Takeaways and What Is Important

Each subsection of this report will also provide a brief “TAKEAWAY” and “WHAT IS IMPORTANT” for the reader as a way to summarize what the data say and a consideration about how that specific data affects the current or future Solano County economy.

Community Indicators and Some Gains and Challenges

Community challenges remain while other indicators show that Solano County's communities are progressing as the economy continues its emergence and resurgence. In some of these indicators, a progressing economy should lead to forward progress in the community. However, there are lags in how rising incomes and job growth then become positive social change.

Solano County's population continues to grow, driven by foreign immigrants

The county population rose in 2013 by 3,918 people to an estimated level of 423,265 as of July 1, 2013 reported by the California Department of Finance (DOF); DOF projects Solano's population to be 592,850 by 2050 and 634,852 in 2060. Solano County is projected to grow more quickly than California on average and also the rest of the Bay Area. However, Sacramento's metropolitan statistical area is projected to see population grow even more quickly than Solano County. Solano County's population has grown since 2010 due mainly to foreign immigrants versus new residents from other parts of the United States; there was net immigration of 1,633 people in 2013. There was a natural increase of over 9,000 people since 2010, for an overall growth of 10,045 or 2.43 percent growth.

Through 2050, Solano County will see continued shifts toward more ethnic diversity and an aging population. However, after 2030, Solano County will experience uniform population growth between the ages of 18 and 64, the classic working-age population and some accelerated population growth based on younger residents of working age. A new indicator in this report shows Solano County is slowly moving in this direction: the population's dependency ratio, the proportion of the population over 65 and those less than 18 years of age, is slowly falling. This is a trend in the Bay Area overall, but not in counties such as Sonoma, Napa and Marin counties.

Education data suggest dropout rates still a challenge, but more students are CSU and UC ready

Education data for Solano County shows a mix of good news and challenges. The dropout rate remained stable in 2011-12, the latest date reported by the California Department of Education, at 4.7 percent. The dropout's ethnic mix remains skewed toward African-American students. Asian students are showing continued progress and lower dropout rates, as well as larger numbers being UC/CSU ready upon graduation. Overall, there has been steady growth in eligibility for CSU and UC campuses, but Solano remains slightly behind the state average.

Healthcare coverage rises, confounded by the Affordable Care Act

A bright spot in Solano County's community data is the population that is covered by health insurance. In 2011, 94 percent of residents under 18 years of age for all income levels were covered by health insurance, more than the average in California overall, the United States overall, Sacramento and the rest of the Bay Area. Sacramento was slightly higher for covering children under 18 and closer to poverty-level income. The Bay Area is slightly better, just slightly, at providing insurance for folks below 65 years of age overall. Whether these data remains as good community progress indicators is debatable with the introduction of the Affordable Care Act, where coverage should rise across all jurisdictions.

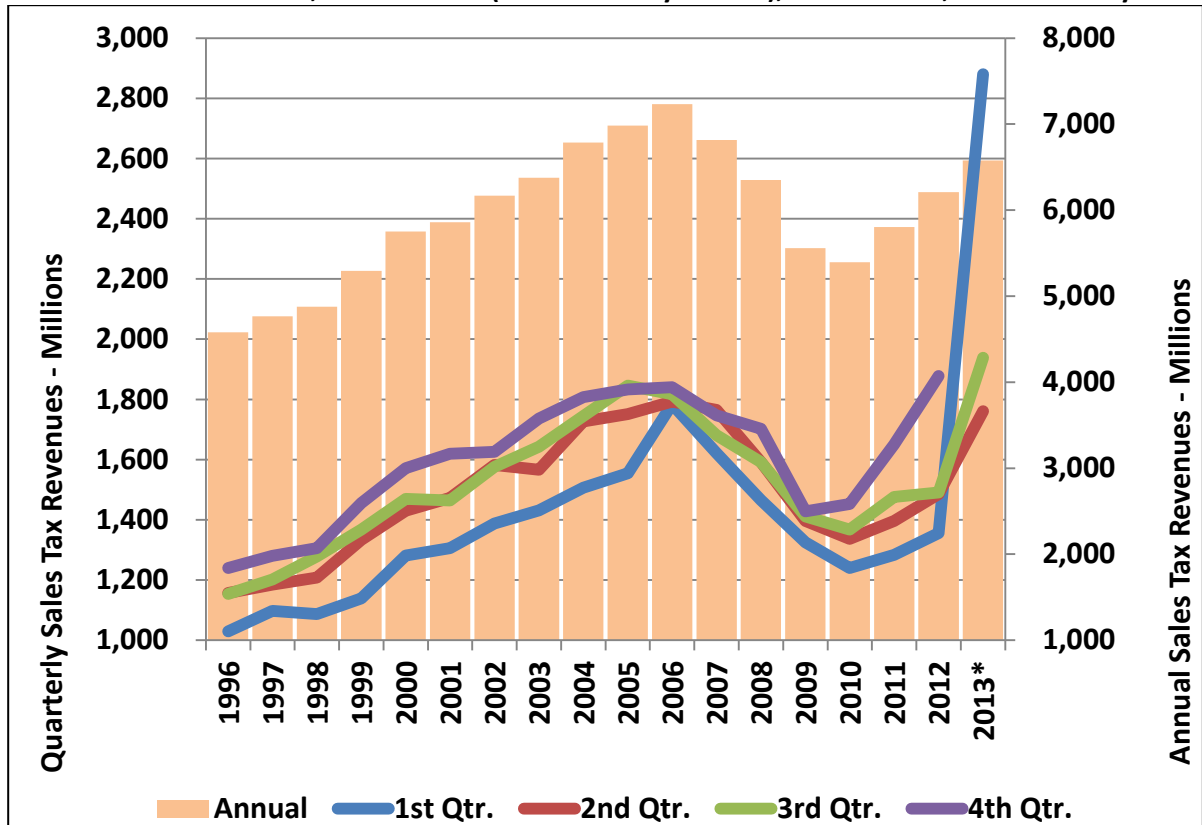
Housing Markets see a major upswing in 2013

The last twelve months have seen some extraordinary growth in median housing prices, triggered by three major events. The first was some cleansing of “distressed” inventory, where the number of foreclosures/notices of default fell to pre-recession levels. The number of units offered also fell overall, which further constricted supply. Finally, the economy’s continued growth drove demand up for housing, as interest rates began to slowly climb up, and provided some upward pressure on financing costs. The combination of supply reductions and demand expansion lead to home prices rising 24.3 percent in 2013. Prices are up 31.5 percent from 2010 and over 56 percent since the lowest median home prices. The Bay Area and California overall experienced faster rates of housing price growth, which means Bay Area prices are likely to peak sooner than Solano County, but have also become less affordable for workers.

Government Revenue continues to rise

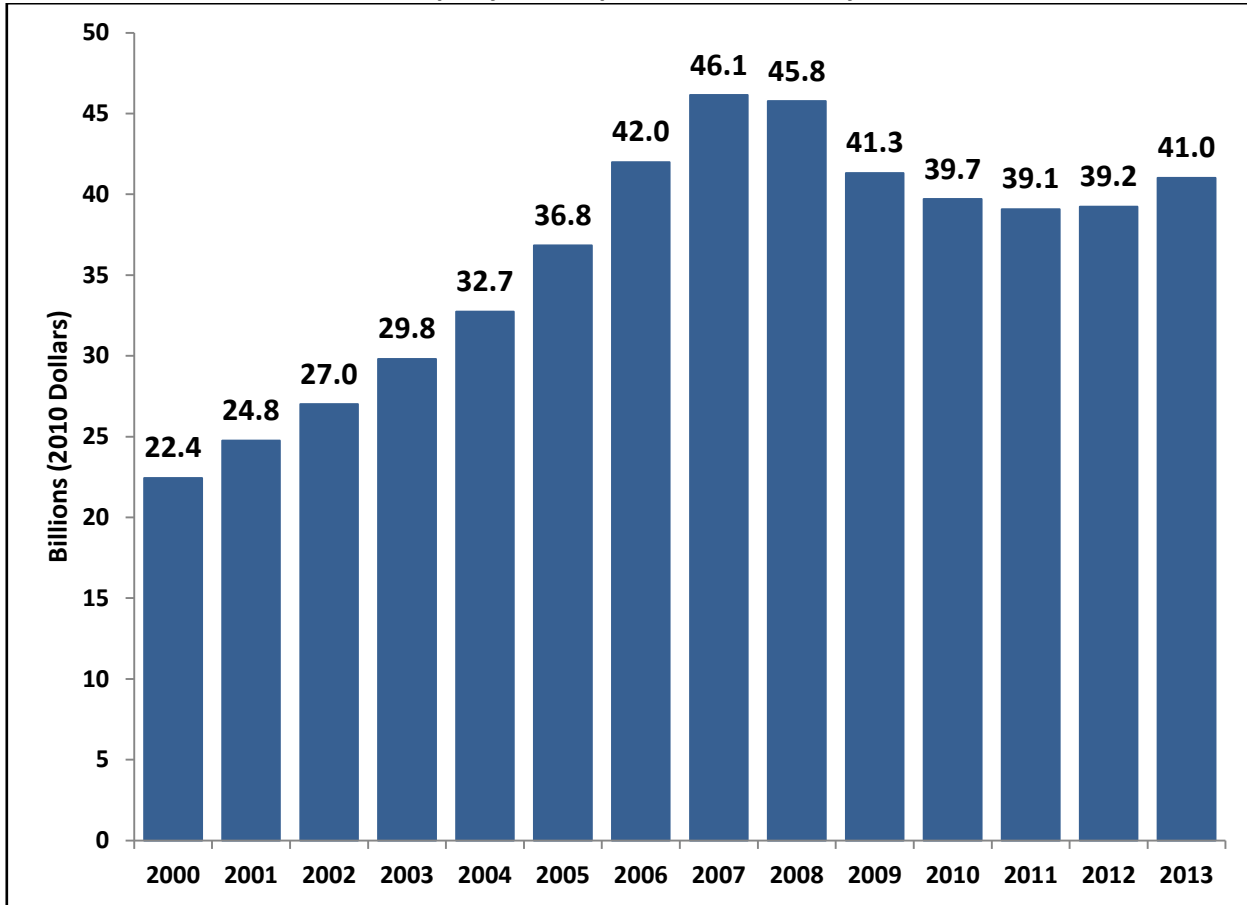
The combination of rising home prices and taxable sales suggests that there will be continued increases on the revenue side for Solano County’s government. Taxable sales increased in 2012 on a quarter by quarter basis after inflation adjustment, and the 4th quarter of 2013 should also be reported as rising versus 2011. The first two quarters of 2012 were on average 6 percent growth in taxable sales over 2011, and over 10 percent growth since 2010 when taxable sales hit bottom.

Taxable Sales Data, 1996 to 2012 (estimated to year end), 2010 Dollars, Solano County



Source: California Board of Equalization (<http://www.boe.ca.gov/news/tsalescont.htm>); * 2013's data is only through Q3

Assessed Home Values for Property Tax Purposes, Solano County, 2000 to 2013, 2010 Dollars



Source: Solano County Assessor's Office

New Data

The 2013 Index of Economic and Community Progress adds some new data to monitor annually. These data include some of the work being done by a research team called "Moving Solano Forward." That team is looking at economic diversification strategies for Solano County with respect to Travis Air Force Base (Travis) and Travis' integration in the county economy.

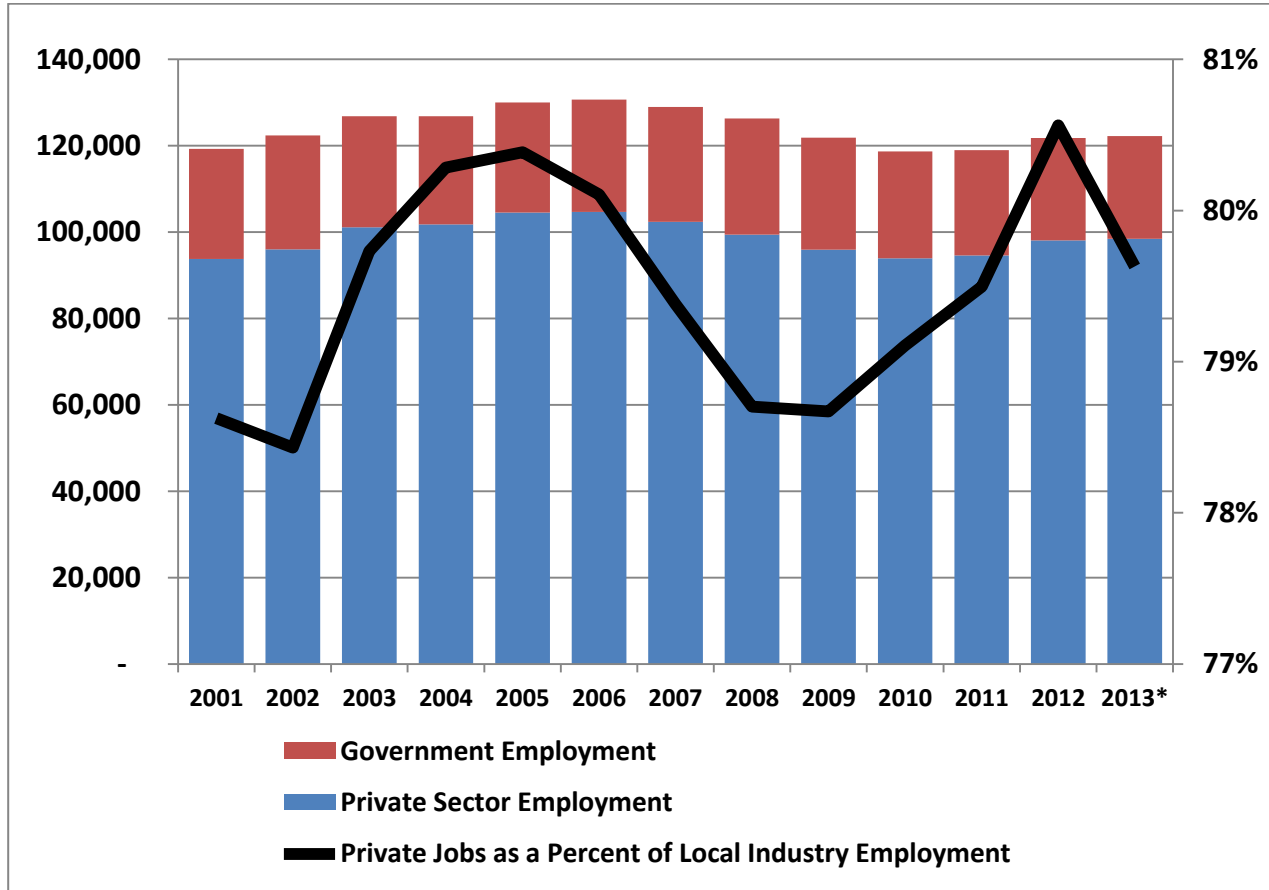
Included also are simple affordability measures, for both businesses in terms of relative wages levels for many types of occupations and for residential homeownership, provide other ways to see Solano County as a competitive place to attract and retain business. These data also reflect the quality of life in Solano County.

There are also expanded data on Solano County's cities, including demographic and economic information.



Annual Local Industry Employment (2000 – 2013), Sector Breakdown

Employment in Solano County grew in 2013 by 3,600 jobs or 3.4 percent growth. This is up from 2012 where the growth rate was only 2.9 percent growth. The private sector gains of 3,900 jobs were offset by 300 jobs lost in all areas of government. The Quarterly Census of Employment and Wages (QCEW) provides the official estimates of Solano County’s total employment. According to these data, Solano County’s total industry employment hit a low in the recent recession as of quarter 1 of 2011; the United States and California labor markets saw their employment hit bottom in the first quarter of 2010.



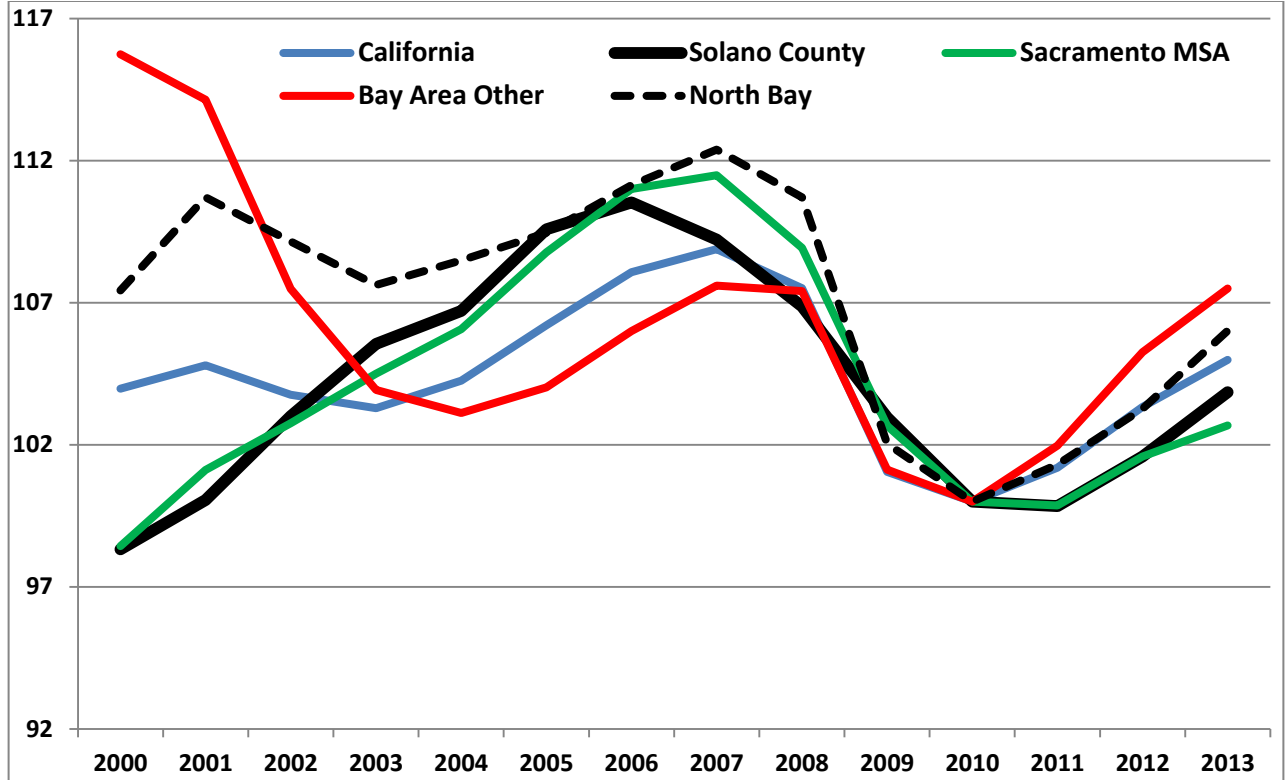
Source: California Employment Development Department (www.edd.ca.gov), *2013 is an average of Jan 2013 to Dec 2013

In 2013, local government is 62 percent of overall public-sector workers, where the state government has grown slightly in its small share of Solano County’s public-sector jobs since 2000. The number of overall, estimated workers in the public sector is only 300 less in 2013 than in 2000; government jobs were at their lowest point since 2000 in the second quarter of 2013.

TAKEAWAY: Solano County is hiring and this growth has continued since 2011 into 2013.

WHAT IS IMPORTANT: Given labor market and economic forecasts for 2014, Solano County industry employment should continue to grow.

Gain or Loss in Industry Employment, 2000-2013
Comparisons between Selected Areas, Index 2010 = 100



Source: California Employment Development Department (www.edd.ca.gov)

Change in Total Industry Employment
(Gain or Loss in Percentage Terms of Total Jobs for Solano County Employers)

Place	2005-13	2010-13	2012-13
Solano County	-5.2%	3.8%	2.2%
California	-1.1%	5.0%	1.6%
Sacramento MSA	-5.6%	2.7%	1.1%
Bay Area Other	3.4%	7.5%	2.1%
North Bay	-3.2%	6.0%	2.7%

Source: www.edd.ca.gov

Looking across the region, changes in total industry employment has been slower in Solano County than in comparable areas except for 2013, where Solano County grew at 2.2 percent. By using these combinations of areas, much of Solano’s surrounding area is covered in the analysis. The North Bay saw rapid losses in both the dot.com recession of 2001-02 and also the Great Recession of 2007-10; Napa and Sonoma hit bottom before the Solano and Sacramento MSAs did and have shown better growth since 2010 as a result.

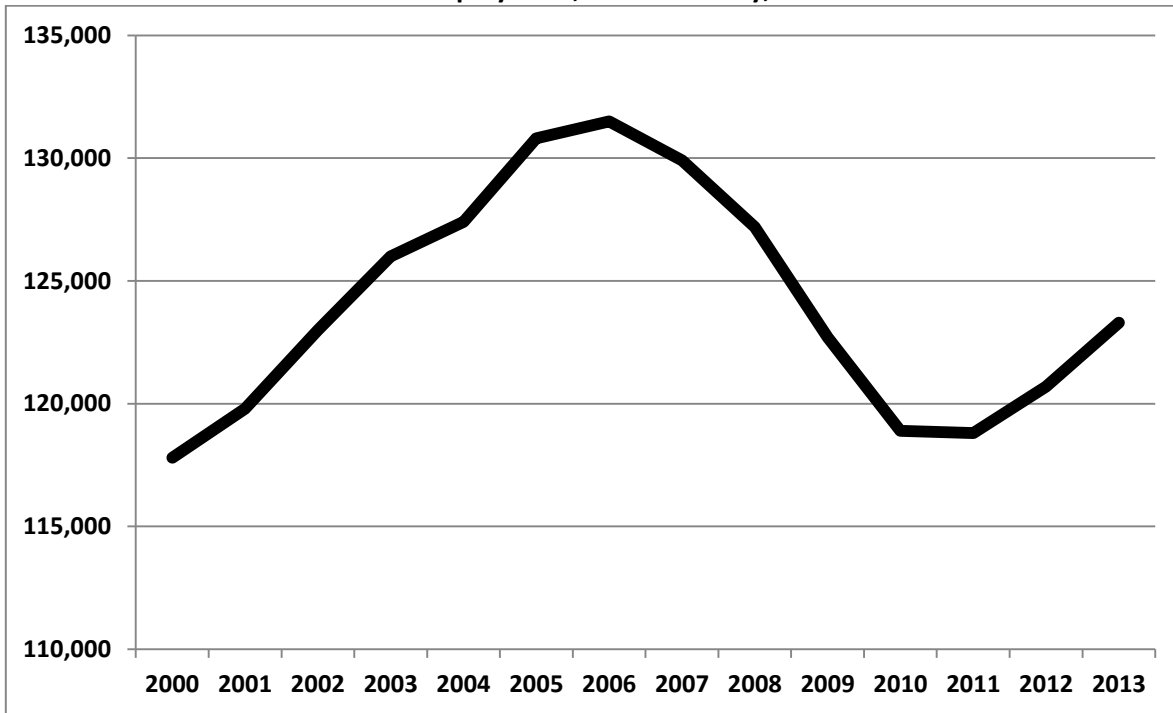
TAKEAWAY: Solano County’s labor markets grew quickly in 2013, and may be accelerating.

WHAT IS IMPORTANT: Solano County lags the overall Bay Area in terms of labor market recovery.

Total Non-Farm Employment

Because 2011 was the labor market rebound beginning for both Solano County and the Sacramento metro area, the growth rates since then are relatively small. For the Bay Area, the recovery has brought back almost 203,000 jobs or 7.4 percent growth in employment from the bottom. Napa and Sonoma combined generated 13,500 jobs since 2010, or about 5.8 percent growth. California, as mentioned above, grew about 4.8 percent, which represents about just over 701,000 workers. Sacramento grew about 2.6 percent or 21,600 jobs since 2010. Since 2011, Sacramento’s MSA has grown more quickly, as has Solano County’s MSA: 2.8 percent and 3.8 percent respectively.

Non-Farm Employment, Solano County, 2000-2013



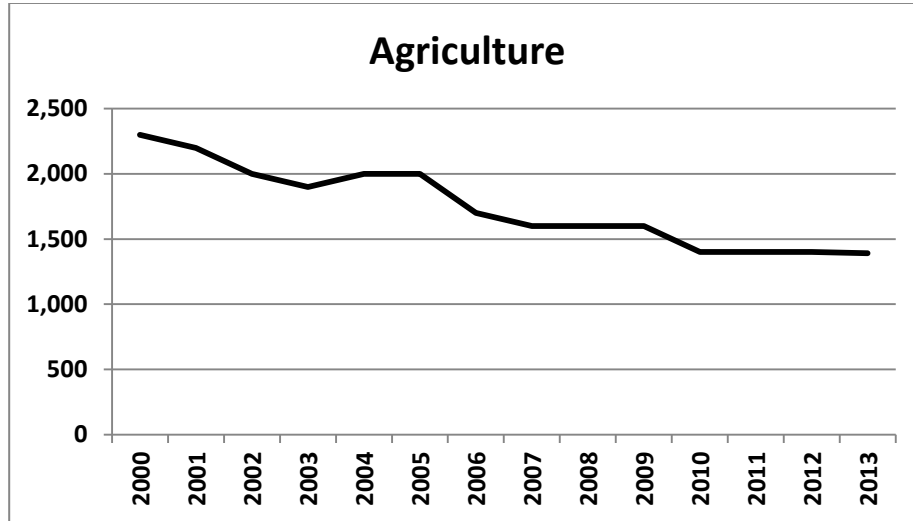
Source: California Employment Development Department (www.edd.ca.gov)

Non-farm employment continued to grow in Solano County in 2013; there was growth of 2.2 percent from 2012 (3,600 jobs), and is 6.7 percent (7,900 jobs) growth since 2010. Between 1997 and 2005, Solano County added 31,300 non-farm, payroll jobs. From 2006 forward to 2013, Solano County has lost 6,900 jobs. The period between 1997 and 2005 was driven by a technology bubble that burst followed quickly by a housing bubble that also burst. While we want to compare to the recent past, a period like the one between 1997 and 2005 is unlikely to return soon. However, 2013 was a year of jobs growth for Solano County. The next set of figures explores these data at the industry level.

TAKEAWAY: Non-Farm job growth in Solano County since 2010 has been dominated by Health Care, Wholesale businesses, Education and Social Services, and Leisure and Hospitality, and other services industries focused on county residents as a market.

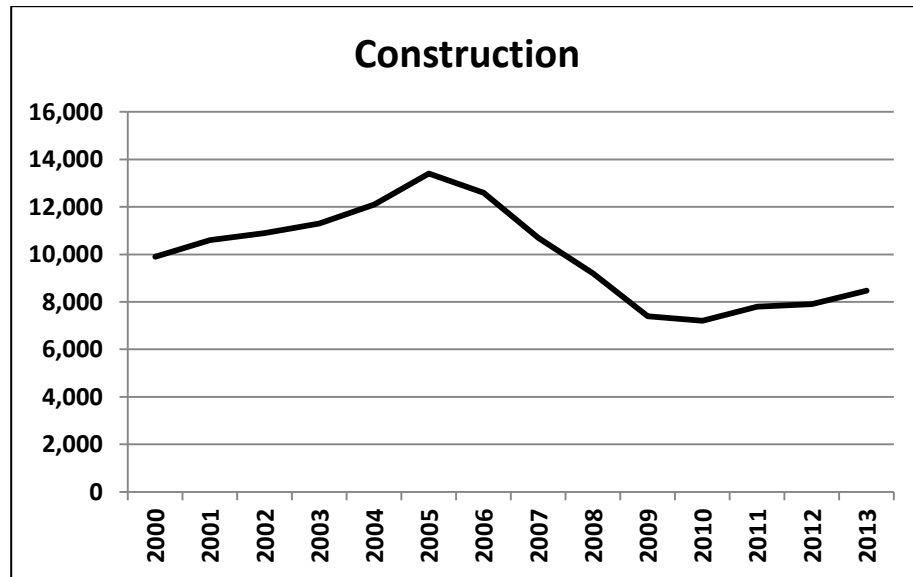
WHAT IS IMPORTANT: Construction and Non-Durable Goods manufacturing have started to show signs of life in terms of hiring more workers during 2013.

Solano County Jobs by Industry, Percentage Change and Share of Total Jobs



Source: California Employment Development Department (www.edd.ca.gov)

Agriculture	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(608)	(208)	(8)	(8)
Percent Change	-30.4%	-13.0%	-0.6%	-0.6%
	2005	2007	2010	2013
Share of Total	1.5%	1.2%	1.2%	1.1%



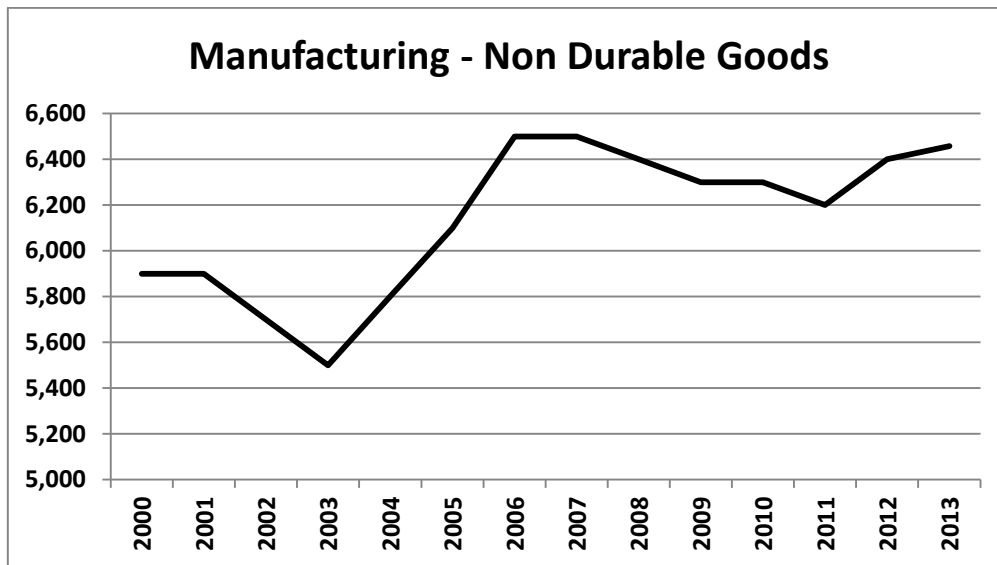
Source: California Employment Development Department (www.edd.ca.gov)

Construction	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(4,933)	(2,233)	1,267	567
Percent Change	-36.8%	-20.9%	17.6%	7.2%
	2005	2007	2010	2013
Share of Total	10.2%	8.2%	6.1%	6.8%



Source: California Employment Development Department (www.edd.ca.gov)

<i>Durable Goods</i>	<i>2005-13</i>	<i>2007-13</i>	<i>2010-13</i>	<i>2012-13</i>
Change in Jobs	(300)	(500)	200	0
Percent Change	-7.7%	-12.2%	5.9%	0.0%
	2005	2007	2010	2013
Share of Total	3.0%	3.2%	2.9%	2.9%



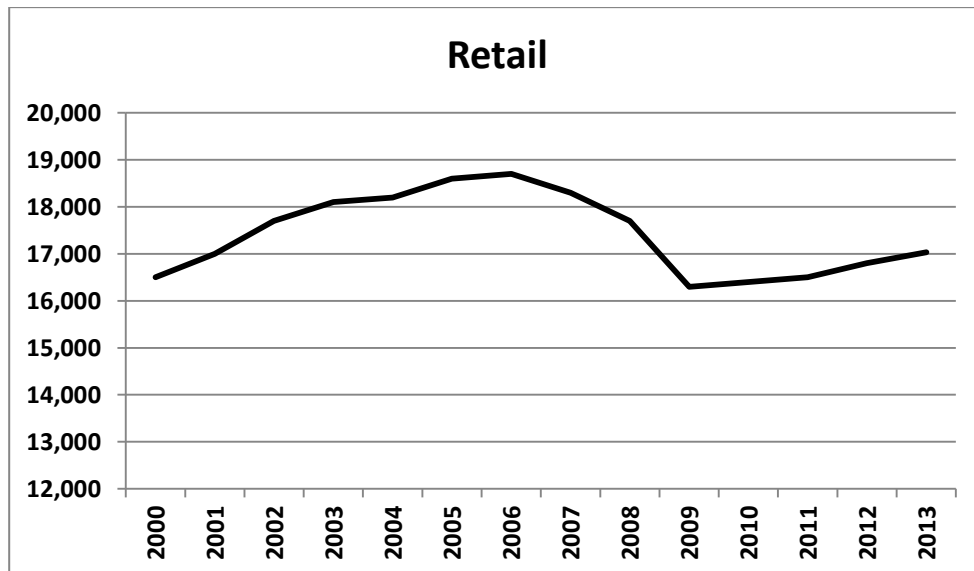
Source: California Employment Development Department (www.edd.ca.gov)

<i>Non-Durable</i>	<i>2005-13</i>	<i>2007-13</i>	<i>2010-13</i>	<i>2012-13</i>
Change in Jobs	358	(42)	158	58
Percent Change	5.9%	-0.6%	2.5%	0.9%
	2005	2007	2010	2013
Share of Total	4.7%	5.0%	5.3%	5.2%



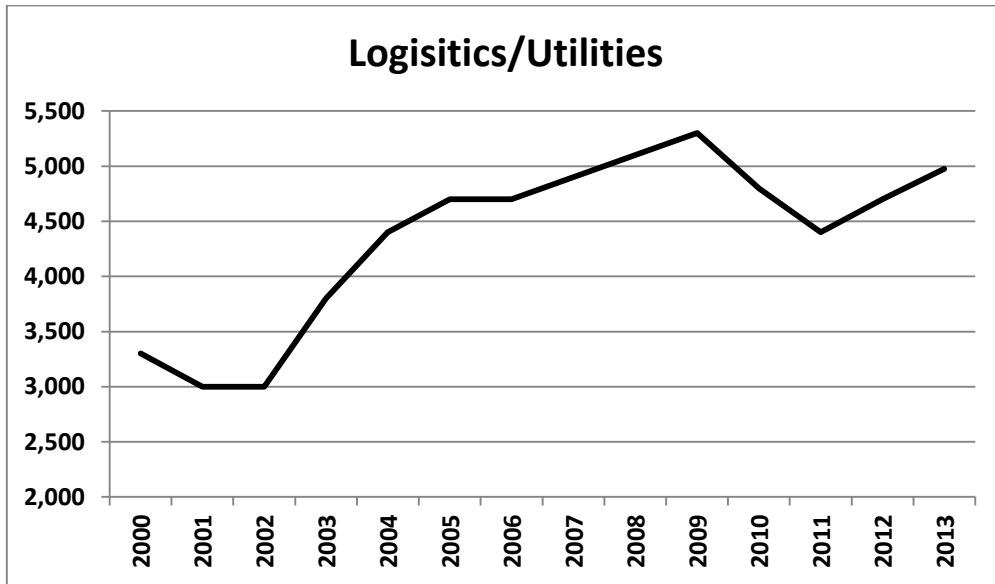
Source: California Employment Development Department (www.edd.ca.gov)

Wholesale	2005-13	2007-13	2010-13	2012-13
Change in Jobs	108	408	408	208
Percent Change	2.5%	10.0%	10.0%	4.8%
	2005	2007	2010	2013
Share of Total	3.4%	3.2%	3.4%	3.6%



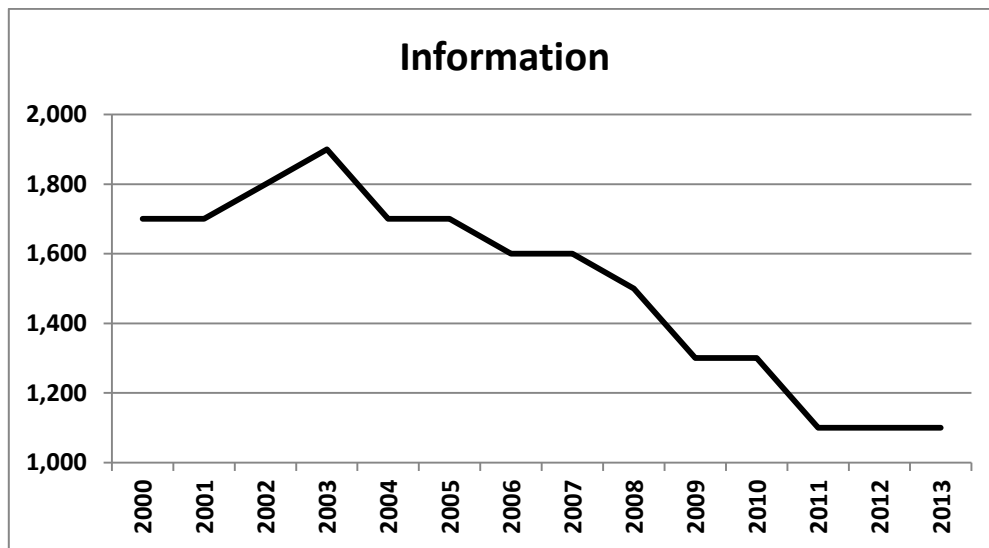
Source: California Employment Development Department (www.edd.ca.gov)

Non-Durable	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(1,567)	(1,267)	633	233
Percent Change	-8.4%	-6.9%	3.9%	1.4%
	2005	2007	2010	2013
Share of Total	14.2%	14.1%	13.8%	13.8%



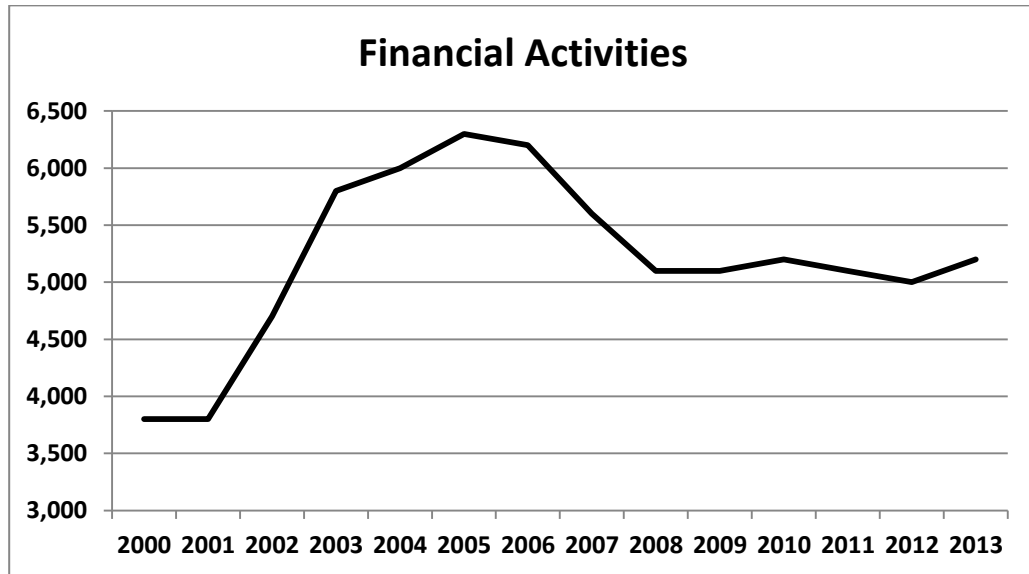
Source: California Employment Development Department (www.edd.ca.gov)

Logistics/Utilities	2005-13	2007-13	2010-13	2012-13
Change in Jobs	275	75	175	275
Percent Change	5.9%	1.5%	3.6%	5.9%
	2005	2007	2010	2013
Share of Total	3.6%	3.8%	4.0%	4.0%



Source: California Employment Development Department (www.edd.ca.gov)

Information	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(600)	(500)	(200)	0
Percent Change	-35.3%	-31.3%	-15.4%	0.0%
	2005	2007	2010	2013
Share of Total	1.3%	1.2%	1.1%	0.9%



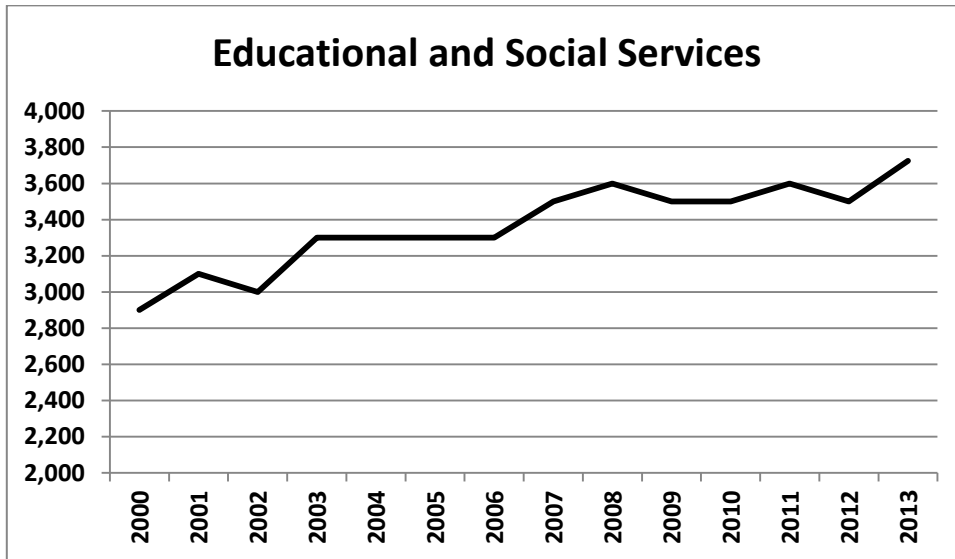
Source: California Employment Development Department (www.edd.ca.gov)

<i>Financial</i>	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(1,100)	(400)	-	200
Percent Change	-17.5%	-7.1%	0.0%	4.0%
	2005	2007	2010	2013
Share of Total	4.8%	4.3%	4.4%	4.2%



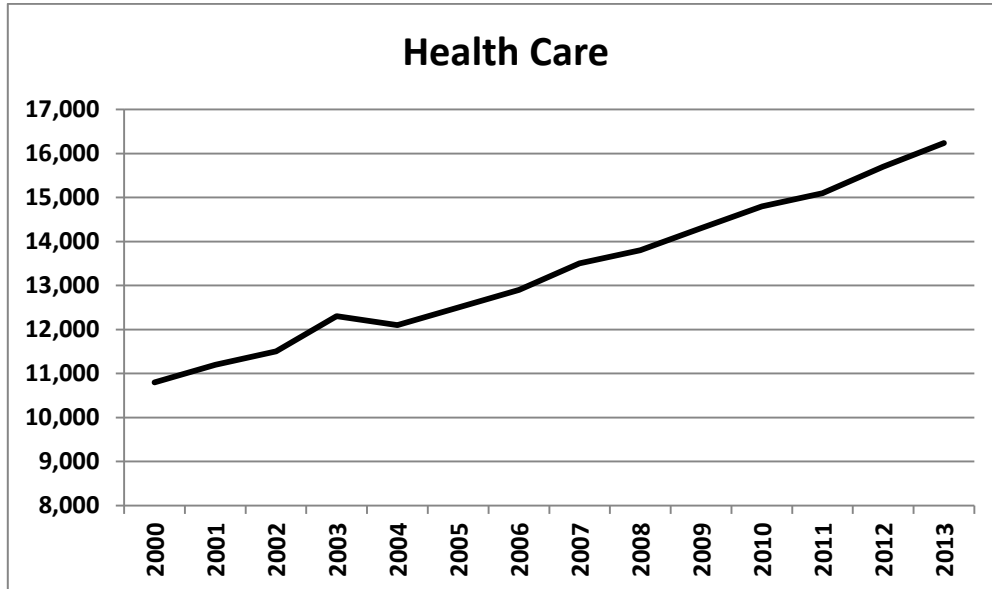
Source: California Employment Development Department (www.edd.ca.gov)

<i>Professional/ Business Services</i>	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(2,458)	(2,658)	42	142
Percent Change	-21.8%	-23.1%	0.5%	1.6%
	2005	2007	2010	2013
Share of Total	8.6%	8.9%	7.4%	7.2%



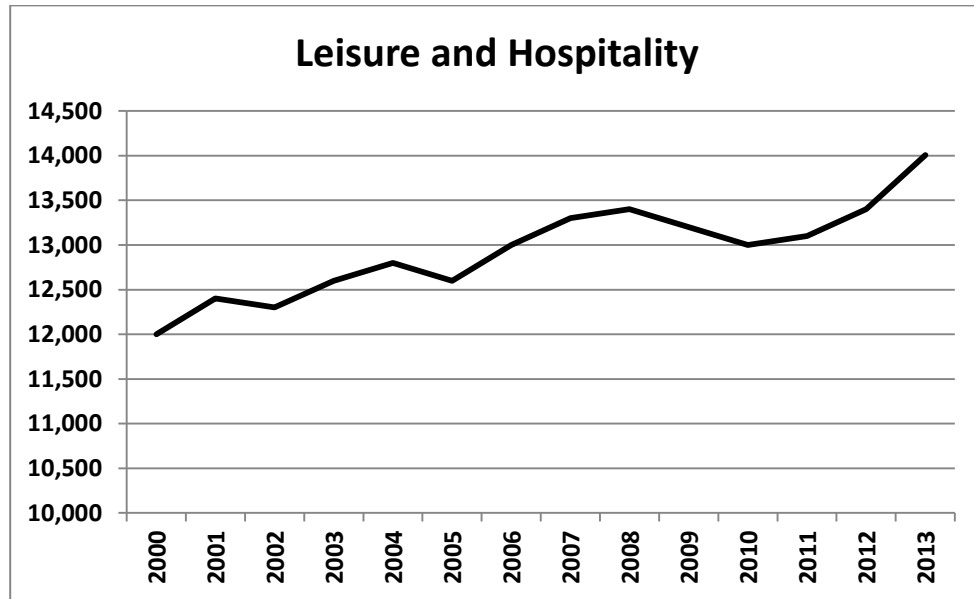
Source: California Employment Development Department (www.edd.ca.gov)

<i>Educational and Social Services</i>	<i>2005-13</i>	<i>2007-13</i>	<i>2010-13</i>	<i>2012-13</i>
Change in Jobs	425	225	225	225
Percent Change	12.9%	6.4%	6.4%	6.4%
	<i>2005</i>	<i>2007</i>	<i>2010</i>	<i>2013</i>
Share of Total	2.5%	2.7%	2.9%	3.0%



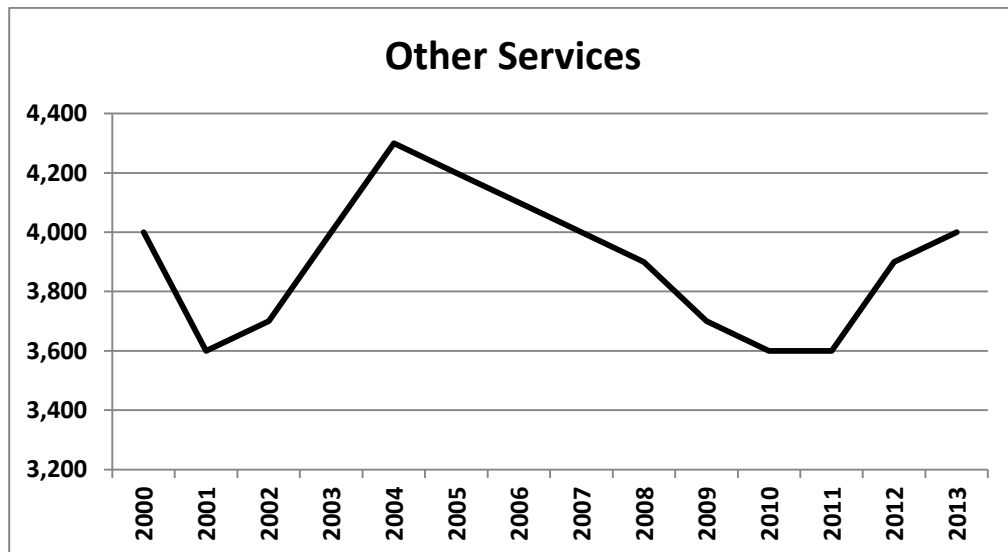
Source: California Employment Development Department (www.edd.ca.gov)

<i>Health Care</i>	<i>2005-13</i>	<i>2007-13</i>	<i>2010-13</i>	<i>2012-13</i>
Change in Jobs	3,742	2,742	1,442	542
Percent Change	29.9%	20.3%	9.7%	3.5%
	<i>2005</i>	<i>2007</i>	<i>2010</i>	<i>2013</i>
Share of Total	9.6%	10.4%	12.4%	13.1%



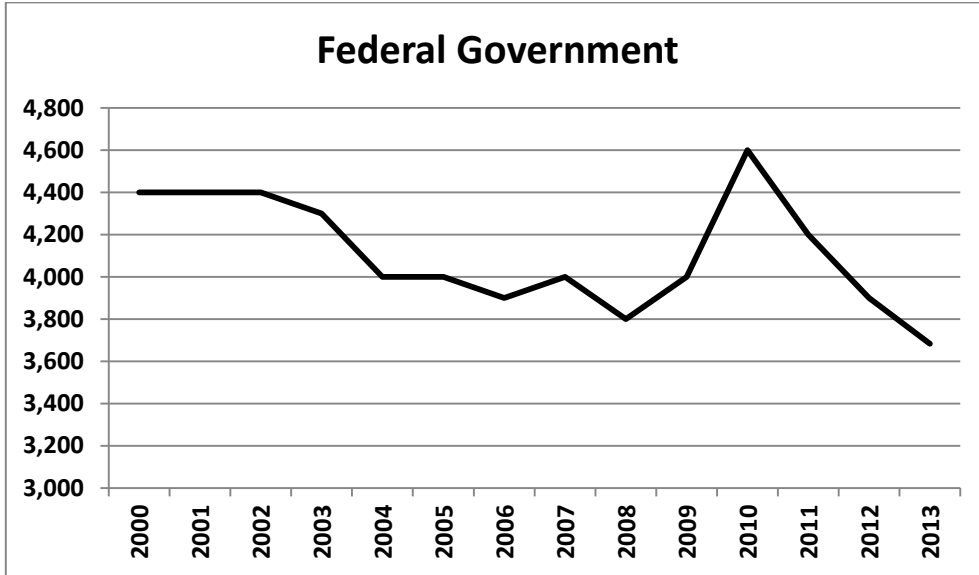
Source: California Employment Development Department (www.edd.ca.gov)

Leisure and Hospitality	2005-13	2007-13	2010-13	2012-13
Change in Jobs	1,408	708	1,008	608
Percent Change	11.2%	5.3%	7.8%	4.5%
	2005	2007	2010	2013
Share of Total	9.6%	10.2%	10.9%	11.3%



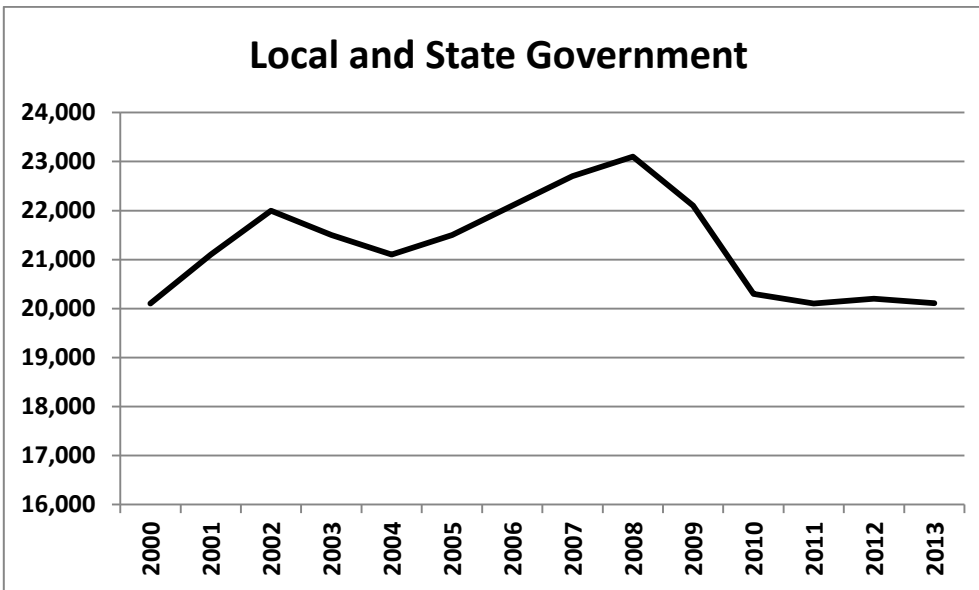
Source: California Employment Development Department (www.edd.ca.gov)

Other Services	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(200)	-	400	100
Percent Change	-4.8%	0.0%	11.1%	2.6%
	2005	2007	2010	2013
Share of Total	3.2%	3.1%	3.0%	3.2%



Source: California Employment Development Department (www.edd.ca.gov)

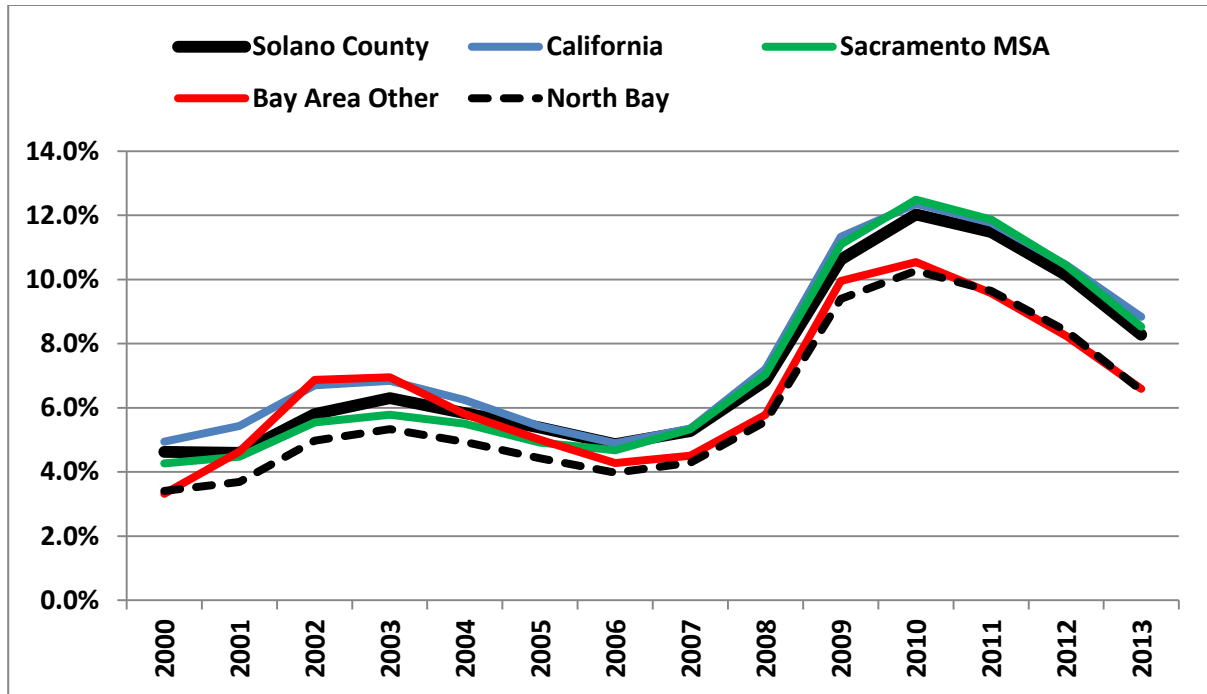
Federal Government	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(317)	(317)	(917)	(217)
Percent Change	-7.9%	-7.9%	-19.9%	-5.6%
	2005	2007	2010	2013
Share of Total	3.1%	3.1%	3.9%	3.0%



Source: California Employment Development Department (www.edd.ca.gov)

Local/ State Government	2005-13	2007-13	2010-13	2012-13
Change in Jobs	(1,392)	(2,592)	(192)	(92)
Percent Change	-6.5%	-11.4%	-0.9%	-0.5%
	2005	2007	2010	2013
Share of Total	16.4%	17.5%	17.1%	16.3%

Unemployment Rates: California, Solano County, Selected Areas, % of Labor Force



Source: California Employment Development Department (www.edd.ca.gov)

Solano County’s annual unemployment rate was 8.3 percent in 2013, and was 10.1 percent for 2012. The lowest unemployment rate experienced by Solano County since 1990 was 4.1 percent in 1999 and 4.0 percent in 2000. While 7.3 percent is relatively large, Solano’s unemployment rate peaked at over 12.2 percent in June 2010. These data show Solano County is moving at a similar pace to Sacramento and the state of California overall.

Quick City-Level Data View, Unemployment Rates (%), Annual Averages

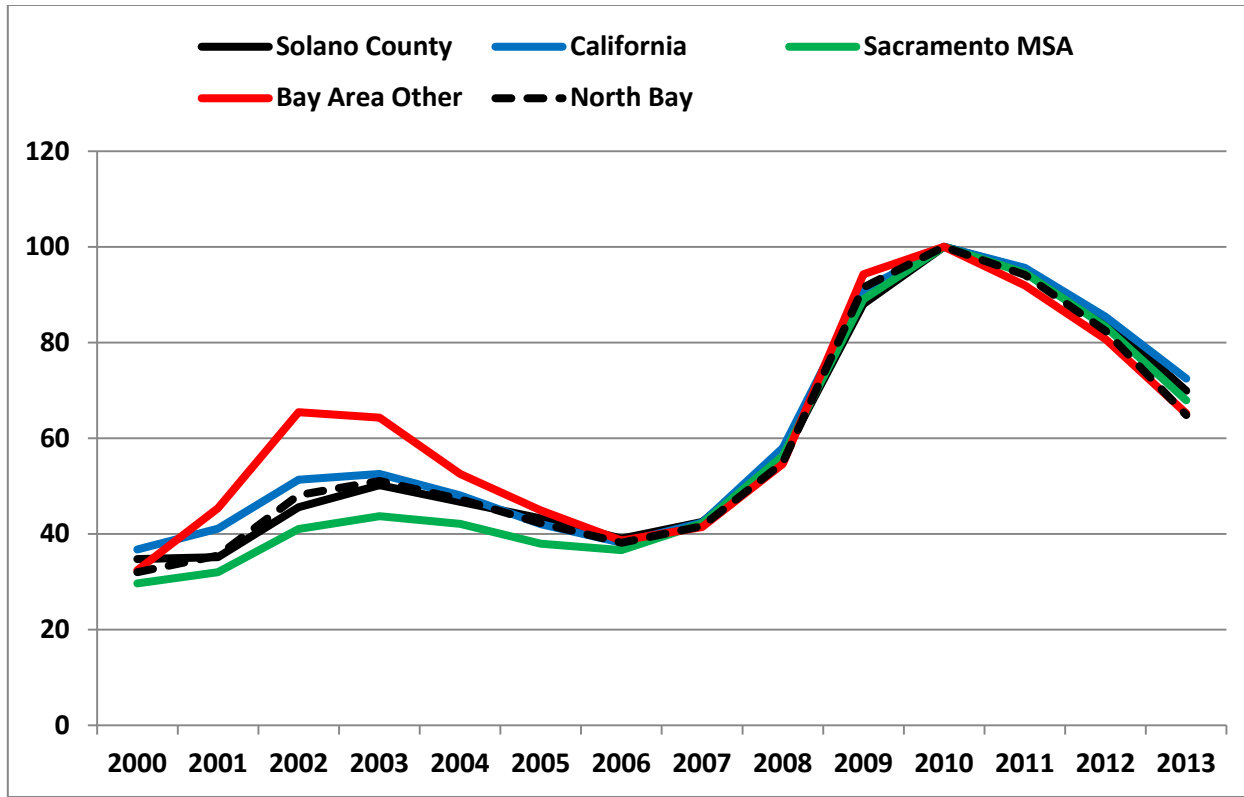
<i>Place</i>	<i>2005</i>	<i>2007</i>	<i>2010</i>	<i>2013</i>
Benicia	3.3	3.2	7.6	5.2
Dixon	4.3	4.2	9.7	6.7
Fairfield	5.9	5.8	13.2	9.2
Rio Vista	4.0	3.9	9.0	6.2
Suisun City	5.6	5.5	12.4	8.6
Vacaville	4.0	3.9	9.0	6.2
Vallejo	6.7	6.6	14.8	10.3
Solano County	5.4	5.3	12.0	8.3

Source: California Employment Development Department (www.edd.ca.gov)

TAKEAWAY: Solano County’s unemployed residents are being hired by local employers and those outside Solano County, which helps lower the burden on local government and generates more personal income and retail sales.

WHAT IS IMPORTANT: The faster the unemployment rate falls, the faster the economy grows in real terms.

Total Unemployed Residents, Index 2010 = 100, Selected Areas



Source: California Employment Development Department (www.edd.ca.gov)

Percent Change in Unemployed Residents, 2013 Compared to Year in Table¹

Unemployed Residents	2005	2007	2010	2012
Solano County	61.6%	64.5%	-30.1%	-17.7%
California	72.5%	71.1%	-27.5%	-15.1%
Sacramento MSA	78.8%	61.1%	-32.1%	-18.5%
Bay Area Other	45.0%	57.2%	-34.9%	-19.2%
North Bay (Napa/Sonoma counties)	53.5%	55.7%	-35.2%	-21.3%

Source: California Employment Development Department (www.edd.ca.gov)

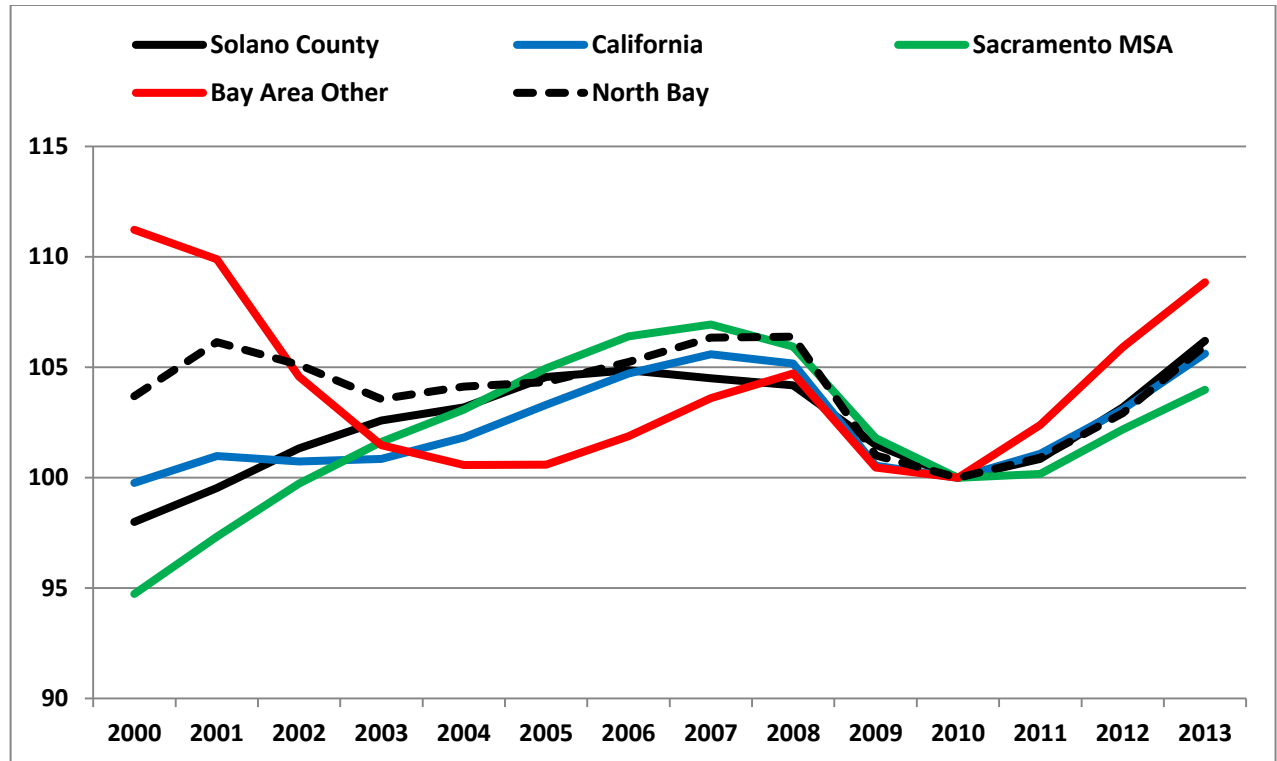
Notice the regions listed are following similar paths toward pre-recession levels since 2010 when the number of unemployed people peaked. The number of unemployed residents is 30.1 percent lower than in 2010 for Solano County, 34.9 percent for the Bay Area MSAs, 35.2 percent for Sonoma and Napa counties combined, and 32.1 percent and 29 percent in Sacramento’s metro area. However, Solano County is 61.6 percent higher in unemployed residents than in 2005 as of November 2013.

TAKEAWAY: Solano County is hiring more of its residents, which corroborates other growth indicators.

WHAT IS IMPORTANT: It is likely that some of Solano’s residents are finding jobs outside Solano County and bringing that income back to Solano County to spend on goods and services.

¹ For example, the 2013 level of Solano County’s unemployed residents is 61.6 percent higher than it was in 2005.

Total Employed Residents, Index 2010 = 100



Source: California Employment Development Department (www.edd.ca.gov)

Solano County is growing faster than many regional counterparts in terms of creating jobs. In 2013, the number of employed residents grew by 2.9 percent, where the Bay Area grew at 2.8 percent. California overall grew its employed residents by 2.4 percent, and the North Bay (Sonoma and Napa) counties grew with a combined 3.0 percent. Since 2010, an additional 6.2 percent of Solano County residents are working. The Bay Area has 8.8 percent more residents working, Sonoma and Napa counties have 6.4 percent more residents working and California residents who are working grew by 5.4 percent since 2010. In terms of people, 3,365 Solano County residents found work in 2013 who were not working in 2012.

Percent Change in Employed Residents, 2013 Compared to Year in Table²

Employed Residents	2005	2007	2010	2012
Solano County	1.6%	1.6%	6.2%	2.9%
California	2.2%	0.0%	5.6%	2.4%
Sacramento MSA	-0.9%	-2.8%	4.0%	1.8%
Rest of Bay Area	8.2%	5.1%	8.8%	2.8%
North Bay (Napa/Sonoma counties)	1.6%	-0.3%	6.0%	3.0%

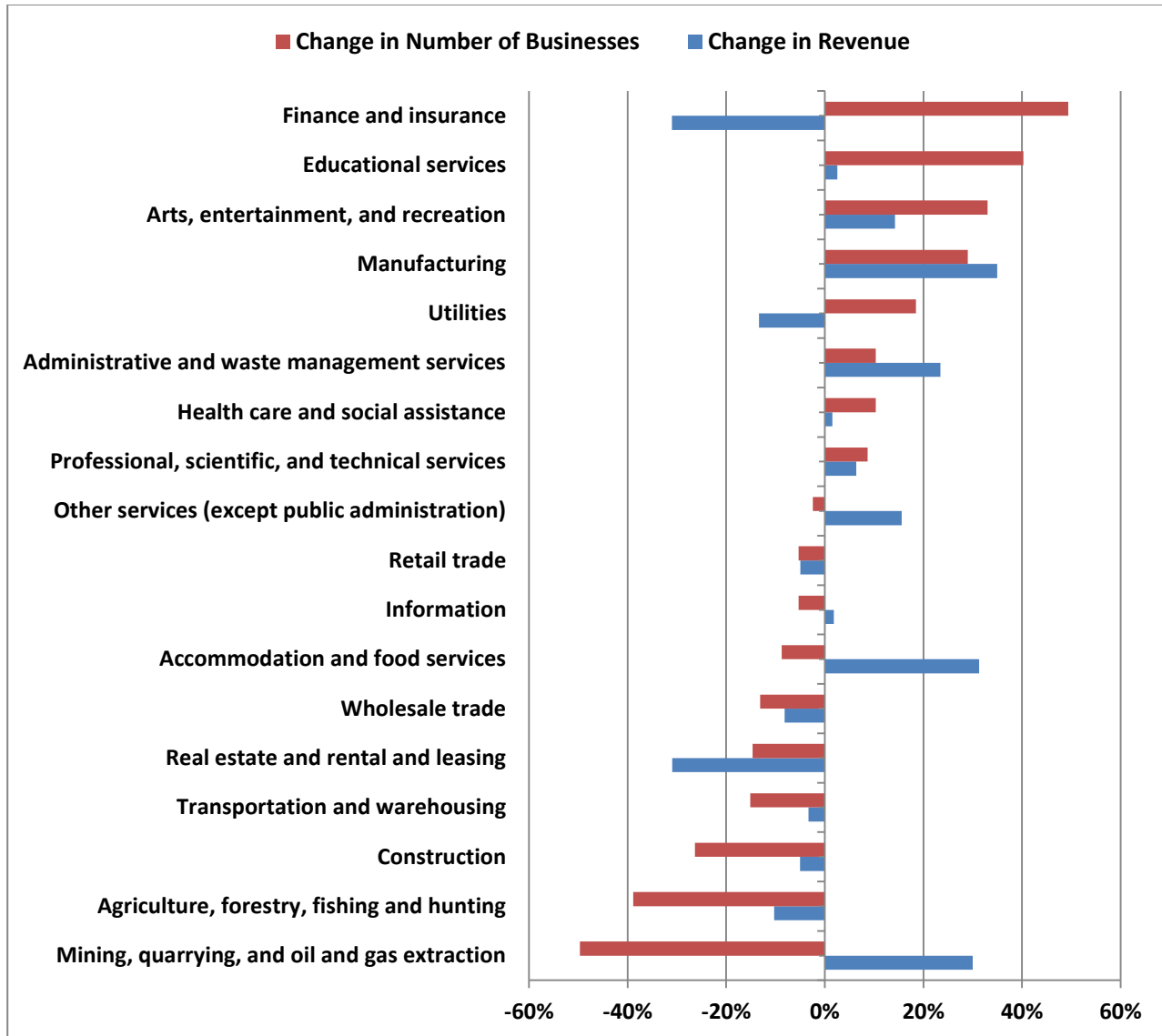
Source: California EDD (www.edd.ca.gov)

TAKEAWAY: Solano County residents are finding jobs faster than most regional areas in 2013.

WHAT IS IMPORTANT: These data show that Solano County continues to emerge and grow from the 2007-10 recession effects on the number of employed residents.

² For example, the 2013 level of Solano County’s employed residents is 1.6 percent higher than the 2005 level.

Non-employers, 2007 to 2011



Source: Census Bureau: www.census.gov

Non-employer businesses are those that have no official (payroll) employees but are viable businesses. These businesses are tracked by their tax filings. The Census Bureau reports these types of businesses with a two-year lag; the latest data for Solano County is 2011, and the chart here compares 2011 to 2007. These data provide a view of the lingering effects of the Great Recession on micro-businesses in Solano County as of 2011.

Notice that finance and insurance show a strong difference between retaining businesses and generating more revenue versus retail trade business and revenue growth move a bit more hand-in-hand. Utilities are similar to Finance and Insurance. Construction firms have still not recovered, where Manufacturing businesses have recovered more. The next table shows how these industries and non-employers have changed from 2010 to 2011, almost all of them growing in both number of firms and revenues.

Non-employers (cont.)

Change in Number of Non-employers and Their Revenue 2010 to 2011, % Change

<i>Industry</i>	<i>% Chg Firms</i>	<i>% Chg Rev</i>
Manufacturing	15.5%	61.0%
Utilities	18.2%	36.3%
Arts, entertainment, and recreation	5.6%	21.4%
Mining, quarrying, and oil and gas extraction	8.3%	21.1%
Accommodation and food services	5.8%	18.6%
Agriculture, forestry, fishing and hunting	0.0%	14.1%
Transportation and warehousing	4.6%	13.0%
Administrative and waste management services	8.0%	10.8%
Health care and social assistance	-4.6%	7.6%
Retail trade	2.5%	6.1%
Construction	1.6%	5.6%
Other services (except public administration)	6.8%	5.5%
Wholesale trade	2.6%	5.1%
Educational services	1.2%	4.3%
Professional, scientific, and technical services	5.1%	4.3%
Information	2.2%	3.5%
Total for all sectors	2.9%	2.3%
Real estate and rental and leasing	-2.9%	-1.7%
Finance and insurance	-3.6%	-37.3%

Source: Census Bureau: www.census.gov

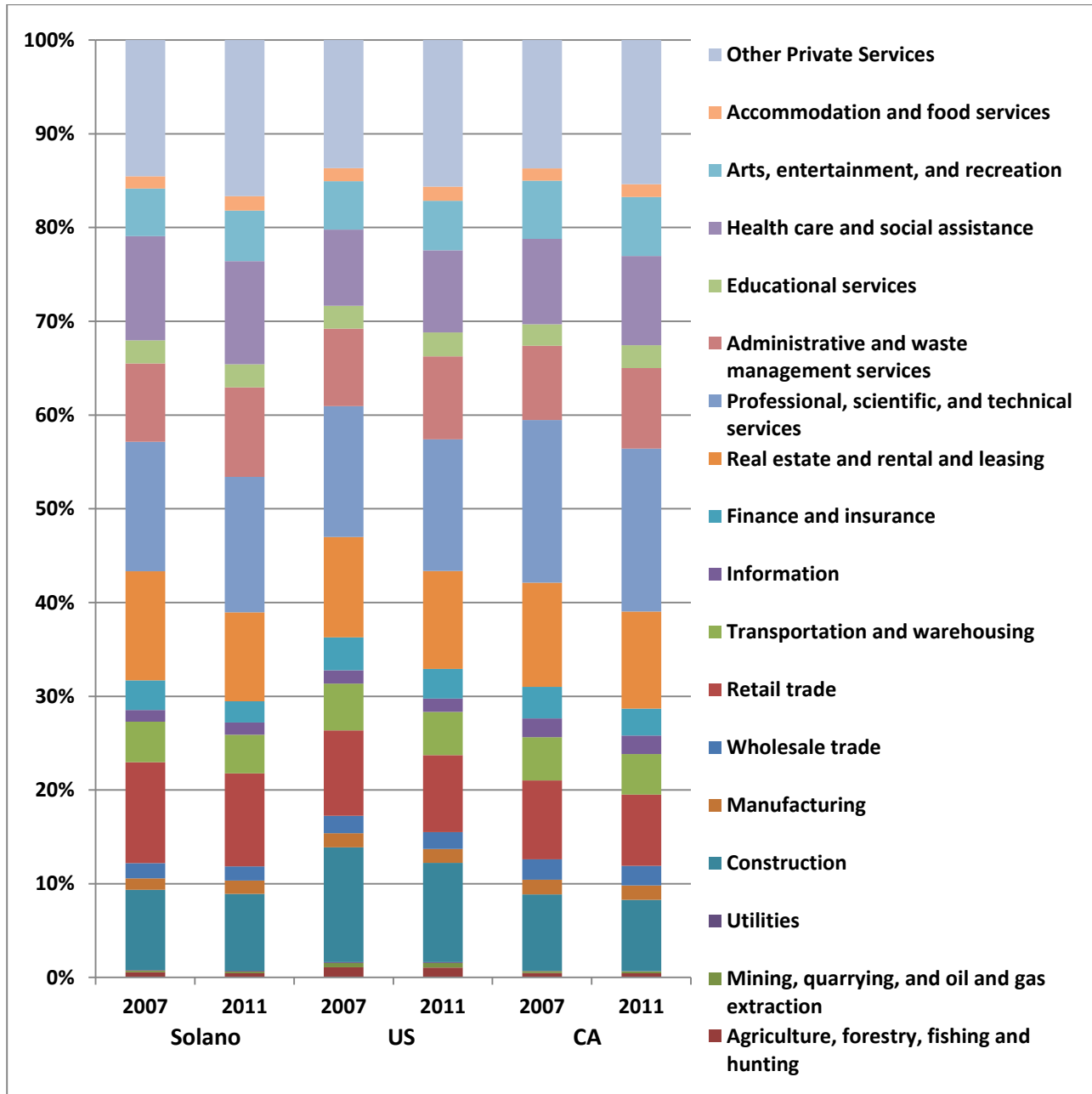
Notice that finance and insurance has been shrinking, while manufacturing saw some strength in 2011. Most of these industries are growing, which corroborates the data of economic growth overall for Solano County. This trend is likely to continue in the 2012 and 2013 data once they arrive.

TAKEAWAY: Small businesses have rebounded in Solano County, and that rebound began in earnest in 2011 as compared to the recession years.

WHAT IS IMPORTANT: Small business is a major engine of economic growth. These data further show evidence that Solano County continues to emerge from the recession in terms of labor market and business opportunities.

In comparing Solano County's mix of non-employers to California and the United States overall in 2011, Solano County remains below California in terms of "goods producing" industries versus services industries, and the United States overall has more goods-producing non-employers than both Solano County and California. For non-employers, Solano County has 10.4 percent of these micro-businesses producing goods and approximately 89.6 producing services. These proportions are similar to 2007. For California, the 2011 percentage is 13.7 that are producing goods. For the United States, the current mix is 9.8 percent for goods producers versus 90.2 percent providing services. This is slightly down from 2007.

Percentage of Non-Employers (Solano County, United States, California), 2007 and 2011

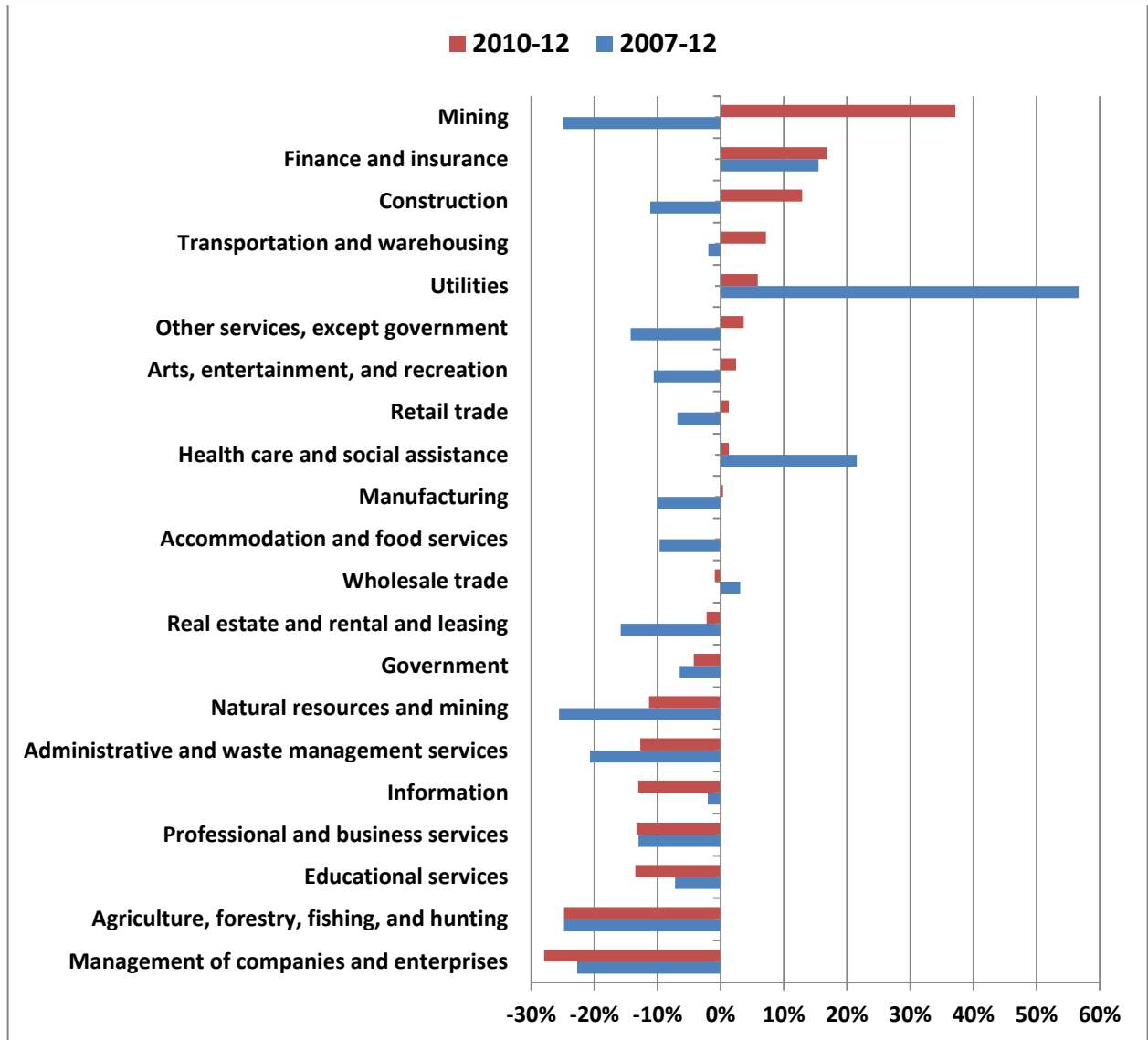


Source: Census Bureau: www.census.gov

TAKEAWAY: Solano County has a larger proportion of services-providing non-employers than the state of California or the United States overall.

WHAT IS IMPORTANT: Professional services, real estate services, and a mix of “other services” are the typical types of service-providing non-employers, where construction and contractors are the dominant goods-producers for non-employers in Solano County, California and the nation overall.

GDP change by sector, Solano County: 2007 and 2010 compared to 2012, 2010 Dollars



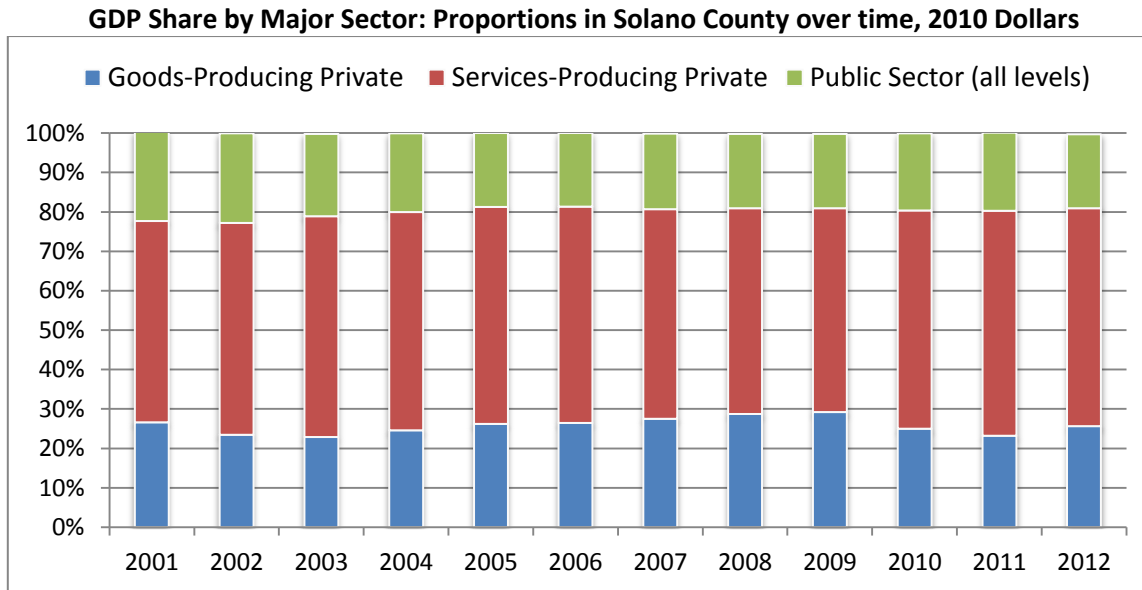
Source: Bureau of Economic Analysis (www.bea.gov)

Using 2007 and 2010 as comparison dates, these data suggest that Solano County is still not back to pre-recession levels in terms of producing goods and services. These data are sorted by the largest gains since 2010, which are encouraging. Durable goods, construction, and logistics have all experienced income growth since 2010 as industries. Finance and Insurance and utilities have grown beyond the pre-recession levels. Health Care has grown since 2007, but the growth has slowed down since 2010. Many other services and agriculture have yet to recover production losses from the recession of 2007-10.

TAKEAWAY: In terms of producing goods and services, Solano County has more industries growing since 2010 versus 2007, and these industries are helping Solano continue to emerge from recession.

WHAT IS IMPORTANT: There are still a large number of industries that are below 2007 and 2010 production levels, which means that Solano County still has room to grow.

GDP by Sector (cont.)



Source: Bureau of Economic Analysis (www.bea.gov)

The shares of GCP in Solano County should change very little year to year, but may change significantly over longer time periods due to industries moving to Solano County or moving away. Other industries grow inside Solano County, which can also shift production proportions. In 2012, Solano’s GDP showed more change in goods-producing industries, which increases the proportion for those types of businesses.

Shares of GDP, Solano County, 2005, 2010, 2012, 2010 Dollars

<i>Industry</i>	<i>2005</i>	<i>2010</i>	<i>2012</i>
Agriculture	1.1%	1.2%	1.0%
Non-Farm Private	71.9%	81.2%	68.5%
Utilities	1.4%	1.8%	1.9%
Construction	6.6%	5.1%	5.7%
Durable goods manufacturing	2.4%	2.7%	2.3%
Nondurable goods manufacturing	10.1%	20.4%	15.1%
Wholesale trade	3.7%	4.0%	4.3%
Retail trade	9.2%	7.5%	7.4%
Transportation and warehousing	2.3%	2.4%	2.2%
Information	1.4%	1.5%	1.2%
Finance and insurance	3.3%	3.7%	3.8%
Real estate and rental and leasing	10.6%	8.1%	7.3%
Professional services	2.2%	3.1%	2.7%
Management consulting	1.0%	1.2%	0.9%
Admin and waste manage services	2.7%	2.9%	2.2%
Educational services	0.5%	0.7%	0.6%
Health care and social assistance	7.7%	10.1%	10.8%
Arts, entertainment, and recreation	0.7%	0.6%	0.6%
Hotels/Bars/Restaurants	2.5%	2.4%	2.4%
Other Services	2.9%	2.6%	2.5%
Government	18.4%	20.0%	18.8%

Source: Bureau of Economic Analysis (www.bea.gov)

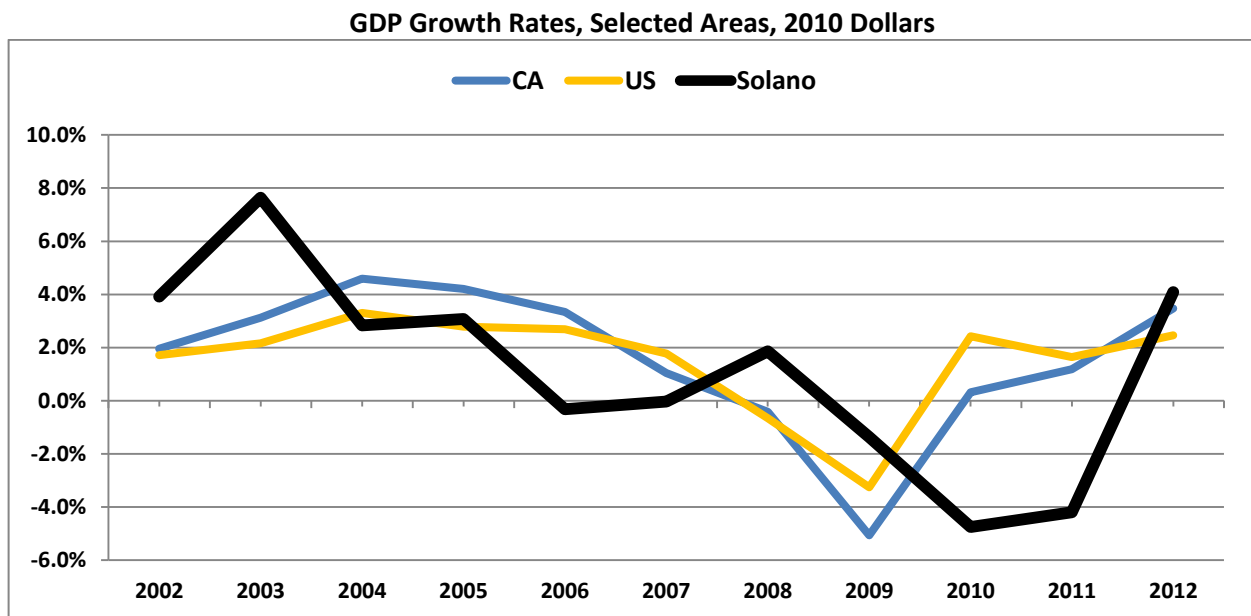
Since 2010, manufacturing jobs have fallen in terms of their proportion of Solano’s gross county product. Manufacturing is still an important part of Solano County’s economy in terms of keeping the local economy diverse. In 2010 and 2011, health care jobs growth drove services growth. It is important to recognize that real GDP in 2005 was 5.2 percent larger than in 2012; the recession reduced the size of Solano County’s economy, but continues to grow in 2013.

TAKEAWAY: Goods-producing businesses have been less than 30 percent of Solano County’s GDP since 2001, but have risen in importance in 2012 due to growth in industries like construction and durable goods manufacturing.

WHAT IS IMPORTANT: The proportions are important in that services and government are predominantly locally-serving. From an economic development standpoint, more goods-producing industries suggest more export income for Solano County, which accelerates local GDP growth.

GDP Growth Comparison, 2002-2012: Solano County, California and the United States overall

Comparing the growth rate of GDP or its equivalent in Solano County to the California and United States growth rates, Solano County has a strong year in 2012. The data above suggest that Solano’s growth will outpace the state and nation again in 2013. The chart clearly shows the effects of the recession on all three areas and also the recent growth for Solano County which started after California’s and the national recovery began.

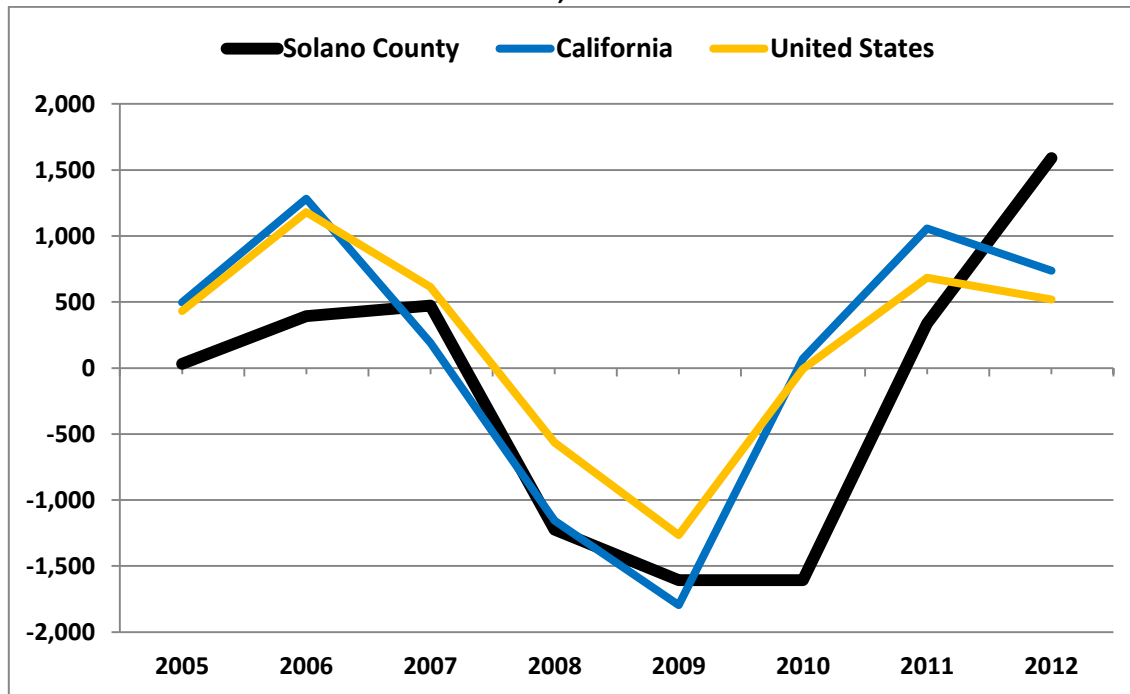


TAKEAWAY: Solano County experienced more GDP growth in 2012 than the nation and state economies overall, where it had lagged in growth since 2009.

WHAT IS IMPORTANT: Solano County’s growth shows it has emerged from the recession and should remain close to trending with the state and nation in 2013.

Personal Income

Per Capita Personal Income Changes: Solano County, California, and United States
2005-2012, 2010 Dollars



Source: Bureau of Economic Analysis (www.bea.gov)

Percent Change in Personal Income Per Capita to 2012, 2010 Dollars

From Date to 2012	Solano County	California	United States
2005	-4.7%	0.9%	2.9%
2007	-7.0%	-2.4%	-1.5%
2010	6.1%	4.2%	3.0%

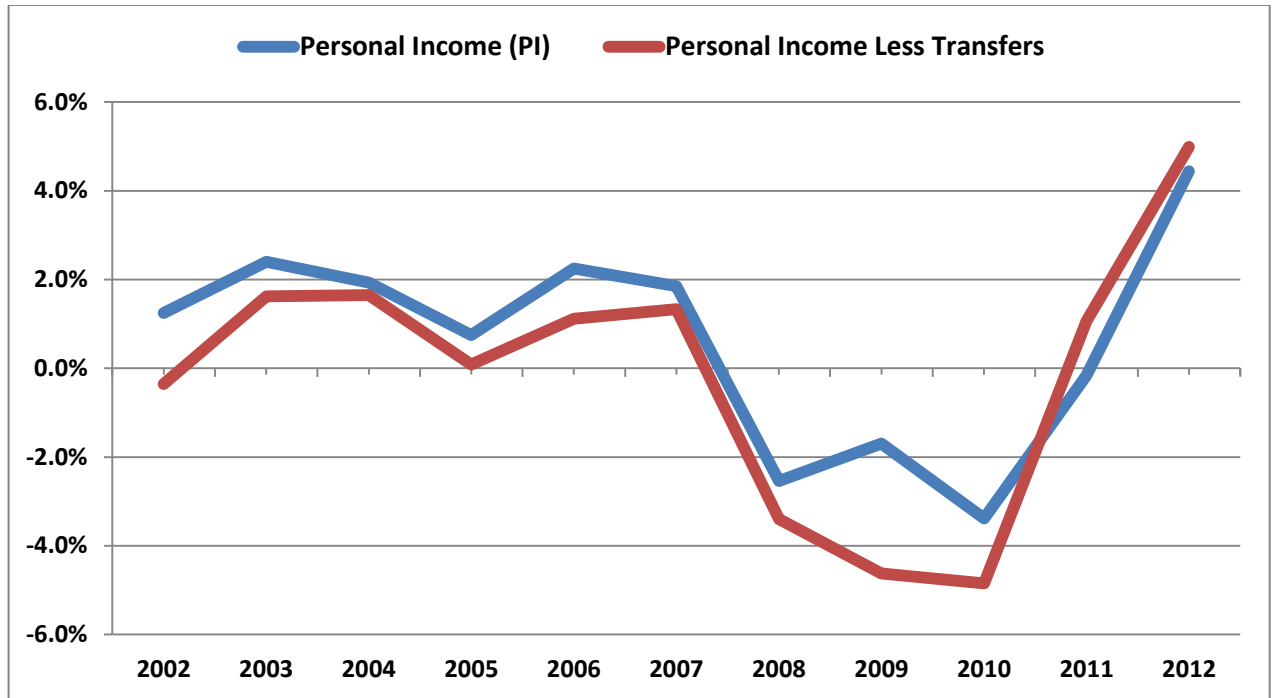
Source: Bureau of Economic Analysis (www.bea.gov)

Personal income is the genesis of retail sales, mortgage payments, and purchases of all kinds. Personal income is made up of wages and salaries, transfer payments from all levels of government, investment income (dividends, interest, and rents), business income from owning a business (proprietor's income) and other income sources. Since 2009, Solano County has seen growth in personal income, initially from stock market gains and investment income, and accelerated by wage and salary growth.

TAKEAWAY: Changes in personal income per capita have been relatively similar between the United States, California and Solano County.

WHAT IS IMPORTANT: Notice that Solano County had a better year per capita than both the state and nation areas in 2012, where Solano County was still climbing out of the recession since the bottom was hit in 2010. Much of the change in 2011 was due to equity market gains versus job growth; 2012 was a mix of both on personal income growth.

Personal Income Rates of Change, Solano County, 2010 Dollars, Percentage Change



Source: Bureau of Economic Analysis (www.bea.gov)

Notice that the growth rate of personal income is no longer outpacing the growth of personal income less governmental transfer payments. This is a sign that Solano County is less dependent on government transfers to generate personal income, and thus retail sales, personal services purchases, and other purchases rise more quickly. Both 2011 and 2012 showed this phenomenon.

TAKEAWAY: Personal income is rising since 2009 in Solano County, which fuels housing, retail and job markets.

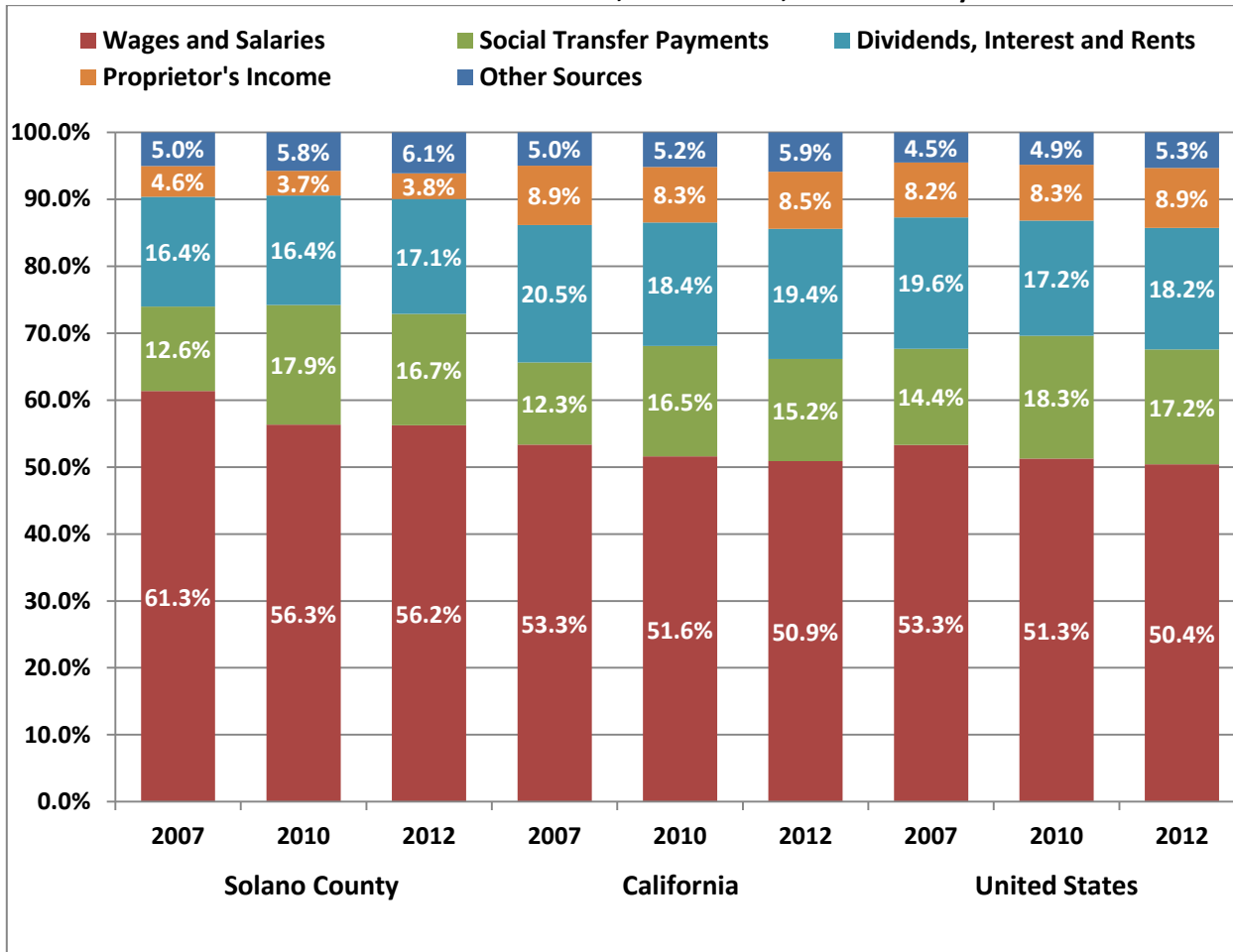
WHAT IS IMPORTANT: When personal income less transfers is growing at a slower pace than personal income overall, the local economy is drawing less from all levels of government as a supplemental income source.

Comparison of Percentage Change in Sources of Personal Income compared to 2013 2010 Dollars, Selected Areas

Percentage Change to 2012	Solano County		California		United States	
	2007	2010	2007	2010	2007	2010
Personal Income	0.6%	6.3%	13.0%	12.0%	2.6%	4.5%
Wages and Salaries	-7.8%	6.0%	7.8%	10.5%	-3.0%	2.7%
Social Transfer Payments	33.0%	-0.9%	40.4%	3.3%	22.7%	-2.0%
Dividends, Interest and Rents	4.9%	11.4%	7.0%	18.1%	-4.9%	10.4%
Proprietor's Income	-16.0%	10.6%	8.8%	15.4%	11.8%	12.0%
Other Sources	22.4%	13.3%	33.6%	27.1%	21.4%	14.6%

Source: Bureau of Economic Analysis (www.bea.gov)

Sources of Personal Income, 2010 Dollars, Solano County



Source: Bureau of Economic Analysis (www.bea.gov)

Wages and salaries remain the dominant way that Solano County residents generate personal income. Transfer payments fell in 2012 as a percentage of overall personal income in Solano County, which is also true for the state of California and the nation overall. Investment income remains a similar proportion of personal receipts, as does proprietor’s income.

TAKEAWAY: Investment and business income are the main reason personal income has grown since 2010 across all areas compared; wages and business income are at lower levels than 2007.

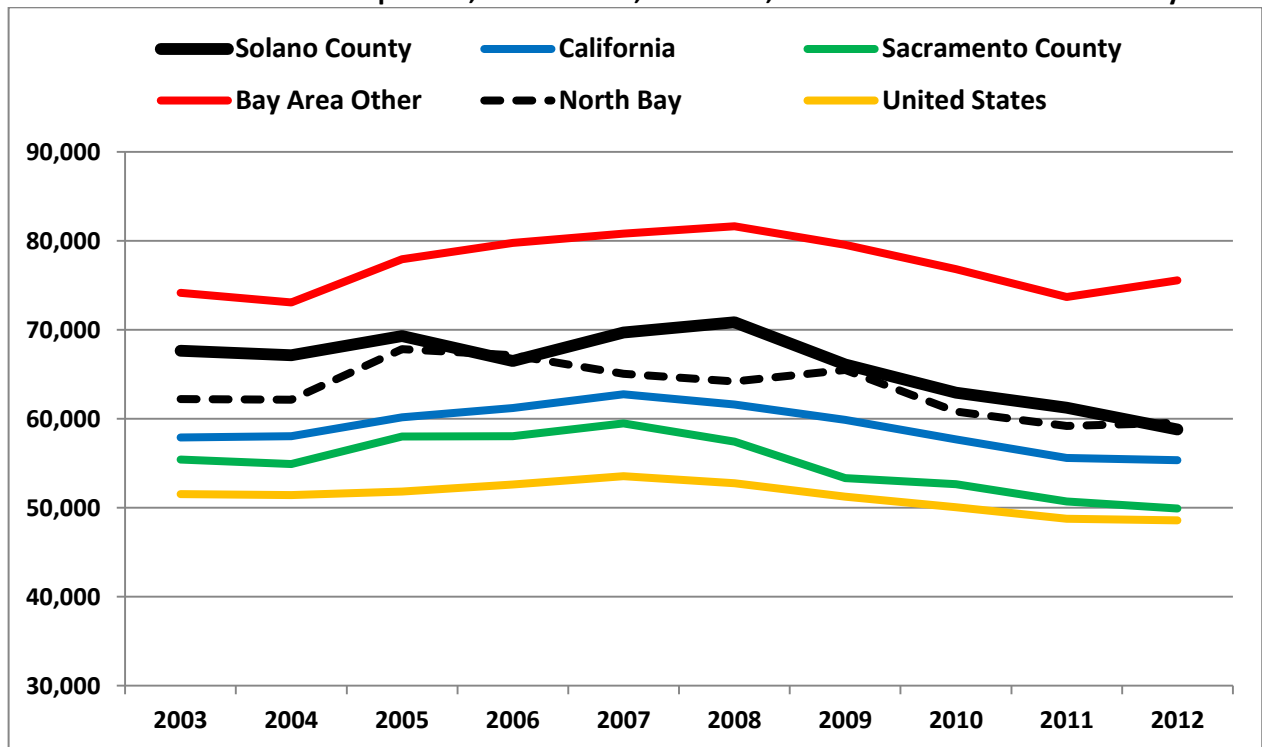
WHAT IS IMPORTANT: When personal income less transfers is growing at a slower pace than personal income overall, the local economy is drawing less from all levels of government as a supplemental income source.

Median Household Income

The Census Bureau tracks households in two forms: family and non-family. Family households have children under the age of 18 in them, while non-family households may have children over the age of eighteen if children are present. Median income measures are used by economists rather than average income because averages are subject to more volatility as incomes rise, where median measures speak to the data series' center and moves less quickly.

For Solano County, median household income fell in 2012 as a ratio to the United States average. California's median income grew in 2012 versus the national median. This suggests that Solano County has been growing in the form of relatively lower income households. This is the second time in four years that median household income has fallen for Solano County. So while Solano County retains a larger median household income than both the United States overall and the state of California, 2012 reduced that difference.

Median Household Comparison, 2010 Dollars, California, United States and Solano County



Sources: Census Bureau (Median Household Income), California Department of Finance (CPI data)

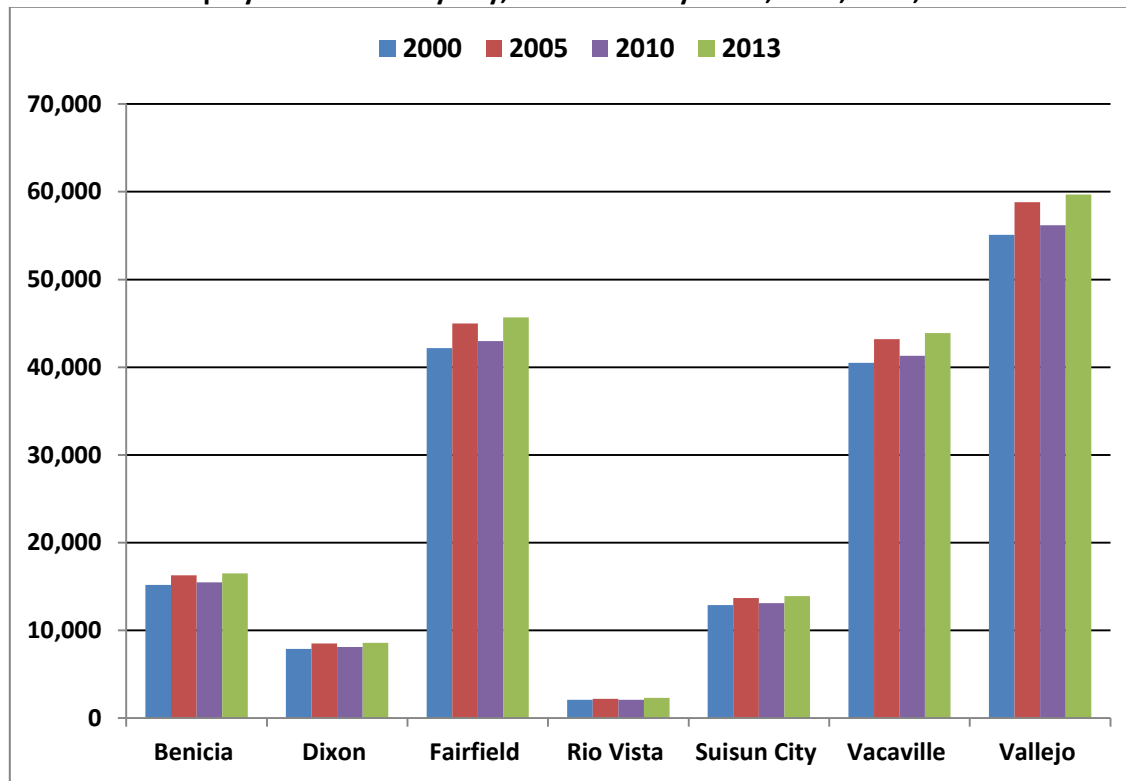
TAKEAWAY: Median household incomes have been on a trend decline since 2008 across all selected areas in inflation-adjusted (real) terms. In current dollars (nominal terms), there has been growth.

WHAT IS IMPORTANT: Median household income is used to measure how well households and families are generating income. Solano County's median household income is still relatively high with respect to the state and the nation, regardless of recent trends.

Cities Overview

Because so much of Solano County’s economy happens within city limits, the 2013 Index of Economic and Community Progress adds a section to provide data on Solano County’s seven incorporated cities. The Employment Development Department of California (EDD) provides labor data for the seven incorporated cities; the Department of Finance provides population projections and housing unit data for the seven cities and the unincorporated portion of Solano County. Using Bureau of Economic Analysis (BEA) data and EDD data combined, “gross city product” or GCP is shown as an estimate versus what is reported by BEA for Solano County overall. In the “Our Changing Community” section of this report, demographic data are provided for some simple comparisons.

Employed Residents by City, Solano County: 2000, 2005, 2010, 2013



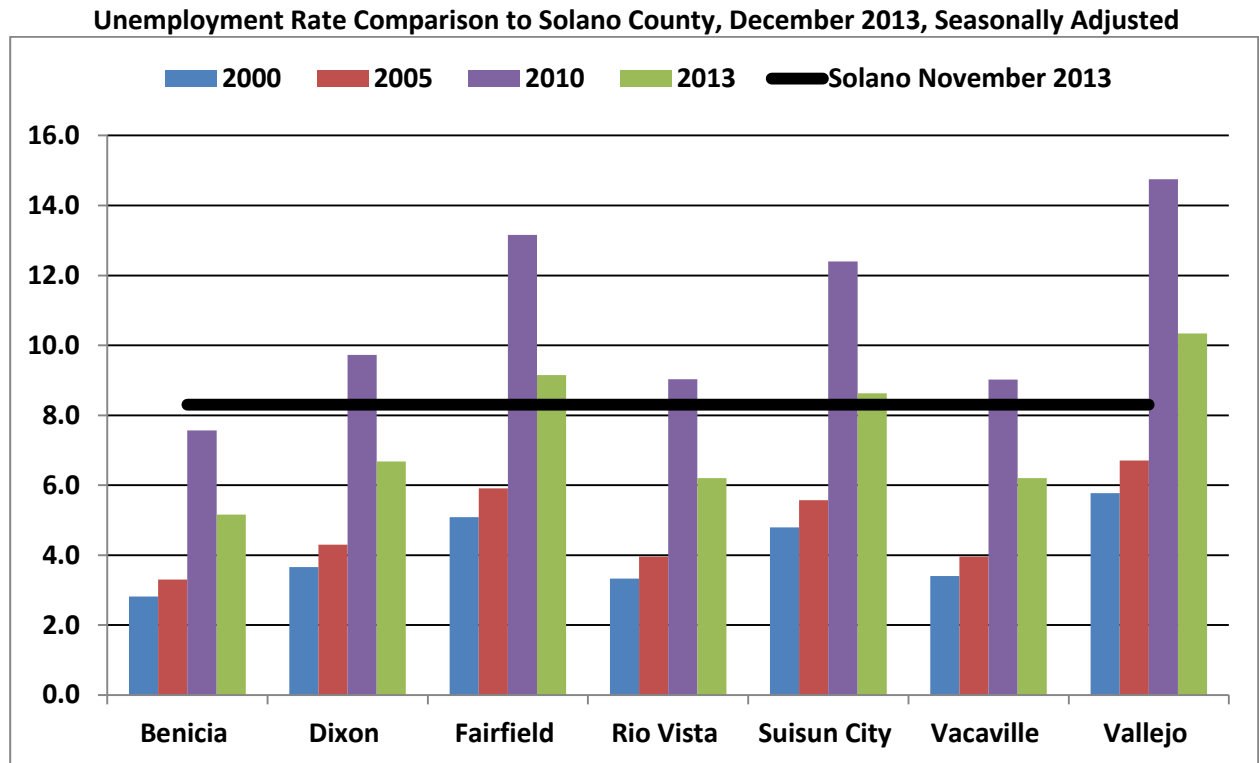
Source: California EDD (www.edd.ca.gov)

Fairfield, Vallejo and Vacaville are the obvious, larger cities in terms of employment. In terms of unemployment, many of the cities remain above the unemployment rate of Solano County overall as of December 2013. Notice in the chart on Page 39 that Vallejo, Fairfield and Suisun City have unemployment rates that are historically higher than the other cities and also higher than the December 2013 unemployment rate for Solano County overall.

TAKEAWAY: All cities have shown employment growth since 2010, where the larger cities have grown more quickly.

WHAT IS IMPORTANT: The major cities in Solano County are likely to grow employment more quickly due to more employment opportunities than the smaller cities.

Cities Overview (cont.)



Sources: California EDD (www.edd.ca.gov)

TAKEAWAY: Some of the cities in Solano County have higher unemployment rates than the county overall, and should be seen as places where more workforce investment programs may be needed.

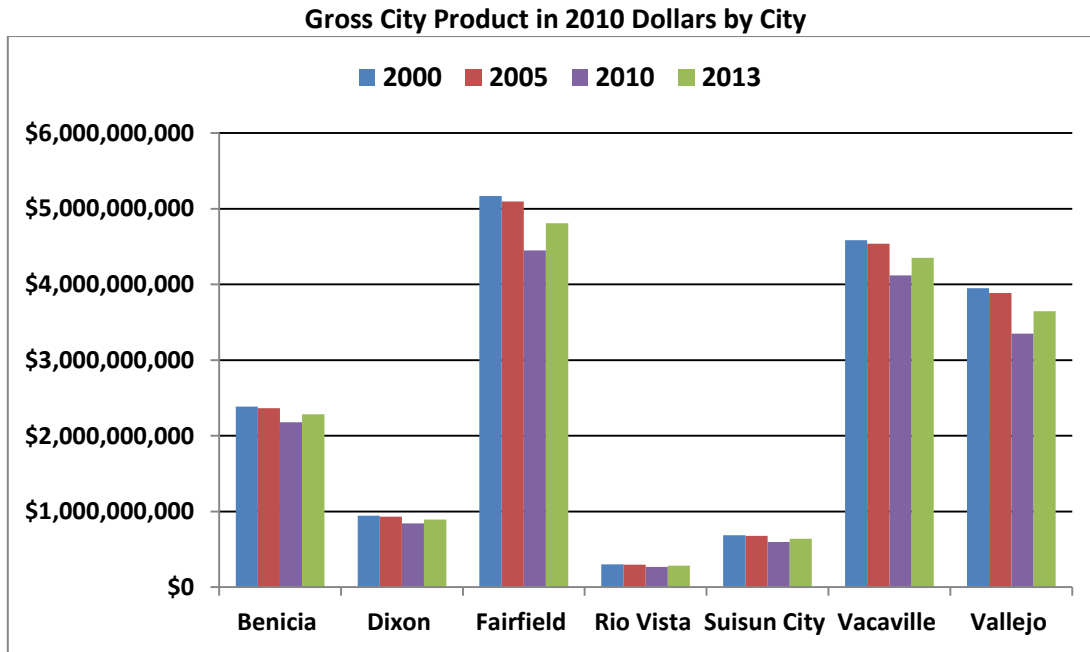
WHAT IS IMPORTANT: Versus the county average, some cities have larger unemployment rates. Vallejo has historically higher unemployment rates than the county’s other cities, which signals some structural issues in Vallejo’s labor markets in creating jobs for residents.

Gross City Product (GCP)

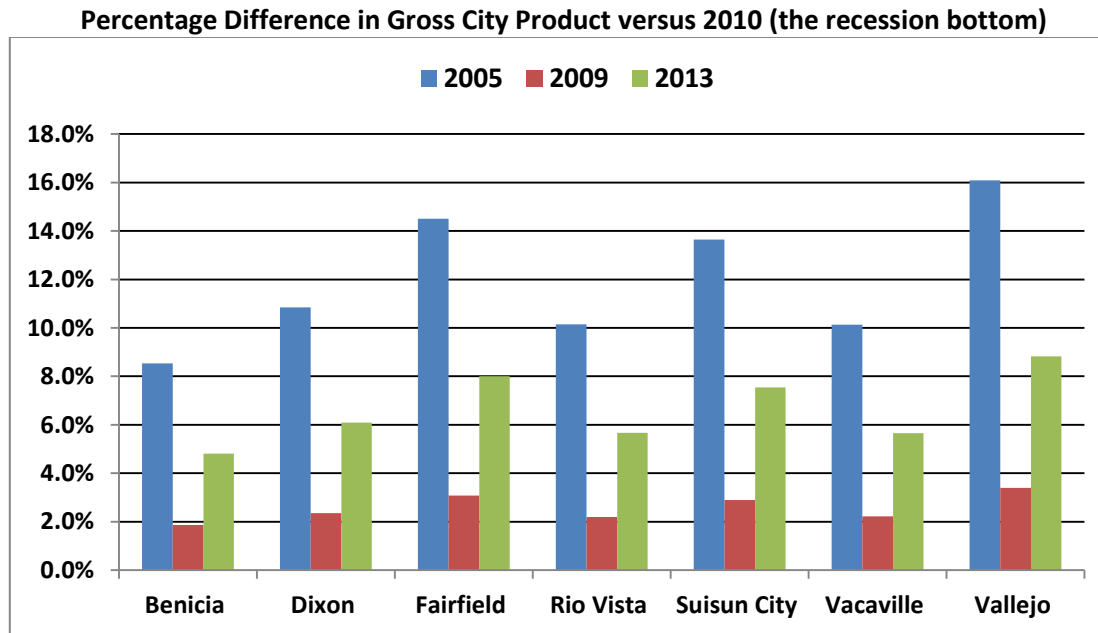
The next two figures track how much each city contributes to the overall production level of Solano County. Gross City Product is the same idea as Gross Domestic Product: the total value of all final goods and services produced in the city limits in one year. The first chart provides real (inflation-adjusted) gross city product for each city in billions of 2010 dollars for 2001, 2005, 2010 and 2013. These data can be tracked by the evolution of Solano County’s gross county product and the labor markets in each city that link to provide an estimate of each city’s gross product level.

These data are the city-level analog of gross domestic product for Solano County. The next table is the percentage change in GCP for each city versus 2010, the year the recent recession ended. These tables show that the cities, like the county overall, have not reached pre-recession production levels yet, and that 2013 (like 2012) has been a year of growth across most cities and the county of Solano. Fairfield, Vallejo and Vacaville generate approximately 72 percent of the county GDP, proportions that have changed little since 2000.

Cities Overview (cont.)



Sources: California EDD (www.edd.ca.gov), IMPLAN (www.implan.com)



Sources: California EDD (www.edd.ca.gov), IMPLAN (www.implan.com)

TAKEAWAY: Fairfield, Vacaville and Vallejo are the economic engines of Solano County, but exhibit similar cycles as the smaller cities and towns since 2005 in terms of GCP growth.

WHAT IS IMPORTANT: Solano County's continued emergence from the recent recession is due mainly (and will continue to be due) to economic growth in Fairfield, Vacaville and Vallejo.

Economic Base and Locally-Serving Industries: Moving Solano Forward

The County of Solano, the Solano Economic Development Corporation, and a team of experts are working on an economic diversification strategy for Solano County. This is linked to Travis Air Force Base (Travis) and its future and how that evolution may affect Solano County’s economy. An initial step to better understand the current diversification of Solano County’s industries is an “economic base” analysis.

Such an analysis splits an area’s industries into two major sectors. First is called “base” industries or those industries that provide a foundation of the local economy to build wealth and income. These categories combine export-focused business, some selling goods, some selling intermediate items (goods used as inputs for another product somewhere outside Solano County), and some services. This includes the effects of tourism on the local economy and how some industries are potentially split between serving an outside market and are more locally-serving.

The second sector is “locally-serving,” where these firms are primarily focused on serving Solano County’s residents. Most of these are services or construction, where construction is assumed to focus primarily on residents rather than exporting housing services. Determining the businesses that go into each category begins with looking at industries that are generating more export income than “domestic” income.

Moving Solano Forward will announce their detailed list soon; these data represent the industry level data for each of these sectors. The data here show the number of jobs in each industry for the second quarter of 2007, 2010, 2012 and 2013. The latest data for Solano County’s labor market that are official estimates and not preliminary estimates are from 2013 quarter 2, and thus comparing the second quarter of our comparison years eliminates seasonality.

Economic Base Industry Employment, 2007, 2010, 2012, and 2013, Q2

	2007 Q2	2010 Q2	2012 Q2	2013 Q2
<i>Base Industries Total</i>	31,596	32,401	31,963	32,375
Agriculture	1,661	1,489	1,672	1,829
Mining	278	223	253	253
Wholesale Trade	3,958	3,986	3,958	3,596
Information	651	612	489	197
Finance and Insurance	1,080	991	917	1,006
Real Estate and Rental and Leasing	290	119	192	221
Professional, Scientific, and Technical Services	180	266	159	268
Management of Companies and Enterprises	1,031	1,217	977	866
Arts, Entertainment, and Recreation	2,651	2,455	2,766	3,429
Accommodation and Food Services	684	701	796	786
Federal government	3,943	4,975	3,915	3,777
State government	4,334	4,618	4,692	4,580
Manufacturing	6,985	6,109	6,179	6,997
Retail Trade	2,209	2,334	2,148	2,465
Transportation and Warehousing	1,661	2,306	2,850	2,105

Sources: Moving Solano Forward and Bureau of Labor Statistics (www.bls.gov) and its Quarterly Census of Wages and Employment (QCEW)

Economic Base and Locally-Serving Industries: Moving Solano Forward (cont.)³

Locally Serving Industry Employment, 2007, 2010, 2012, and 2013, Q2

	2007 Q2	2010 Q2	2012 Q2	2013 Q2
Locally Serving Industries Total	74,537	68,902	68,249	73,333
Utilities	442	480	499	519
Construction	11,217	7,119	7,662	8,221
Information	633	586	547	596
Finance and Insurance	2,508	2,323	2,757	2,748
Real Estate and Rental and Leasing	1,292	1,218	1,005	1,057
Professional, Scientific, and Technical Services	3,177	3,121	2,967	3,381
Admin, Support and Waste Management Services	6,778	6,579	4,589	4,833
Educational Services	1,467	1,537	1,462	1,476
Health Care and Social Assistance	8,842	12,777	13,556	17,124
Arts, Entertainment, and Recreation	1,490	222	326	88
Accommodation and Food Services	462	438	468	464
Other Services	3,421	3,097	3,338	3,490
Local Government	16,680	15,380	14,566	14,437
Local Portion of Retail Trade	15,220	13,281	13,930	14,304
Local Portion of Transportation and Warehousing	908	744	577	595
Jobs in industries that are unassigned by MSF to date	22,798	21,332	21,451	19,331

Sources: *Moving Solano Forward (MSF)* and *Bureau of Labor Statistics (www.bls.gov)*
and its *Quarterly Census of Wages and Employment (QCEW)*

TAKEAWAY: Base Industries are still struggling in net to employ workers versus locally-serving industries since 2010.

WHAT IS IMPORTANT: Tracking employment in these categories can help foresee the growth of the county overall; as base industries continue to employ more workers, Solano County’s economy will grow more quickly as base industries use global markets to generate revenue and not just Solano County residents.

³ At the time of the writing, *Moving Solano Forward* is in the final stages of its research, and changes to these industry assignments (base or locally-serving) may come in later versions. The category of “Jobs in industries that are unassigned by MSF to date” captures the rest of the jobs data per the QCEW data for the quarters in the tables.

Business Affordability: Wages

The Employment Development Department (EDD) of California publishes wages survey results annually for specific types of occupations. These occupations may have different industry settings; for example, a computer programmer may be employed by a biotechnology firm, a retail store, or a hotel, but their core occupation as a computer programmer. These jobs are labeled by Standard Occupation Classification (SOC) Codes, as shown in the tables below. The tables here refer to only the top-line occupation categories. Comparisons are to metropolitan statistical areas (MSAs).

Wages and Occupations, Solano County Compared to Other MSAs, % of State Average Wages in 2010

SOC Code	Occupations	CA	Solano	Sonoma	Napa	Sac	Oak	SF	SJ
00-0000	Total all	\$24.10	94%	95%	97%	98%	110%	125%	135%
11-0000	Management Services	56.64	88%	88%	97%	90%	102%	114%	123%
13-0000	Business and Financial Operations	34.98	93%	90%	94%	88%	106%	126%	119%
15-0000	Computer and Mathematical	42.16	88%	96%	88%	87%	98%	110%	126%
17-0000	Architecture and Engineering	41.56	84%	90%	90%	98%	103%	100%	116%
19-0000	Life, Physical, and Social Science	35.36	102%	101%	134%	92%	107%	117%	124%
21-0000	Community and Social Services	24.59	117%	88%	93%	101%	105%	107%	104%
23-0000	Legal Services	56.00	86%	97%	105%	82%	95%	112%	125%
25-0000	Education, Training, and Library	27.46	98%	92%	113%	95%	100%	109%	104%
27-0000	Arts, Design, Entertainment, Sports, and Media	31.60	70%	80%	68%	82%	94%	109%	104%
29-0000	Healthcare Practitioners and Technical	40.21	99%	95%	112%	103%	110%	112%	122%
31-0000	Healthcare Support Services	14.62	104%	110%	112%	104%	109%	122%	113%
33-0000	Protective Services	25.37	128%	114%	102%	97%	105%	97%	111%
35-0000	Food Preparation and Serving-Related	10.66	95%	104%	113%	99%	101%	114%	101%
37-0000	Building and Grounds Cleaning and Maintenance	13.23	104%	105%	103%	102%	111%	111%	104%
39-0000	Personal Care and Services	12.97	96%	111%	103%	96%	109%	125%	105%
41-0000	Sales and Related Services	18.93	82%	96%	102%	94%	108%	128%	129%
43-0000	Office and Administrative Support	17.82	100%	101%	103%	102%	110%	117%	117%
45-0000	Farming, Fishing, and Forestry	10.11	109%	121%	125%	114%	125%	177%	110%
47-0000	Construction and Extraction	24.62	105%	110%	105%	99%	115%	123%	114%
49-0000	Installation, Maintenance, and Repair	22.86	110%	104%	104%	101%	113%	113%	113%
51-0000	Production Jobs	15.95	119%	107%	122%	107%	113%	113%	114%
53-0000	Transportation and Material Moving Services	\$16.06	102%	99%	102%	100%	114%	123%	104%

Source: Employment Development Department, Occupations Data (www.edd.ca.gov)

Notice that in an overall comparison (the top line data in each table); Solano County is the most affordable labor market of the compared areas versus the state average by this metric. Sonoma and Napa counties are close behind. The Bay Area metropolitan areas of Oakland, San Jose and San Francisco are all significantly above the state average in almost all occupations.

Solano County is more expensive in some categories in 2010 (education, business and finance), and 2013 was similar except for agricultural jobs. What these data provide is a way to look at the affordability of labor in each market versus other locations around California.

Business Affordability: Wages (cont.)

Wages and Occupations, Solano County Compared to Other Areas, % of State Average Wages in 2013

SOC Code	Occupations	CA	Solano	Sonoma	Napa	Sac	Oak	SF	SJ
00-0000	Total all occupations	25.47	92%	93%	94%	99%	113%	126%	133%
11-0000	Management Services	59.34	92%	85%	86%	89%	104%	117%	124%
13-0000	Business and Financial Operations	36.94	95%	93%	93%	90%	107%	121%	117%
15-0000	Computer and Mathematical	44.74	81%	88%	94%	89%	103%	110%	118%
17-0000	Architecture and Engineering	44.63	87%	89%	94%	99%	106%	104%	115%
19-0000	Life, Physical, and Social Science	37.25	100%	109%	97%	95%	106%	116%	115%
21-0000	Community and Social Services	24.80	100%	107%	95%	103%	109%	104%	105%
23-0000	Legal Services	56.87	61%	70%	87%	89%	97%	123%	112%
25-0000	Education, Training, and Library	28.28	99%	90%	90%	95%	104%	106%	102%
27-0000	Arts, Design, Entertainment, Sports, and Media	35.54	69%	72%	70%	71%	81%	96%	90%
29-0000	Healthcare Practitioners and Technical	43.18	106%	111%	96%	110%	116%	114%	120%
31-0000	Healthcare Support Services	15.62	110%	115%	108%	107%	114%	121%	111%
33-0000	Protective Services	25.79	82%	121%	102%	97%	109%	118%	103%
35-0000	Food Preparation and Serving-Related	10.88	112%	101%	103%	99%	101%	118%	105%
37-0000	Building and Grounds Cleaning and Maintenance	13.63	110%	103%	108%	106%	117%	117%	104%
39-0000	Personal Care and Services	13.19	105%	94%	108%	94%	103%	124%	104%
41-0000	Sales and Related Services	19.86	104%	80%	96%	92%	111%	131%	131%
43-0000	Office and Administrative Support	18.62	106%	99%	103%	100%	112%	119%	116%
45-0000	Farming, Fishing, and Forestry	10.00	135%	106%	124%	116%	129%	157%	104%
47-0000	Construction and Extraction	26.12	100%	102%	106%	98%	115%	112%	112%
49-0000	Installation, Maintenance, and Repair	23.68	102%	109%	101%	101%	111%	114%	109%
51-0000	Production Jobs	16.72	109%	120%	106%	108%	118%	116%	114%
53-0000	Transportation and Material Moving Services	16.72	98%	98%	102%	100%	117%	121%	104%

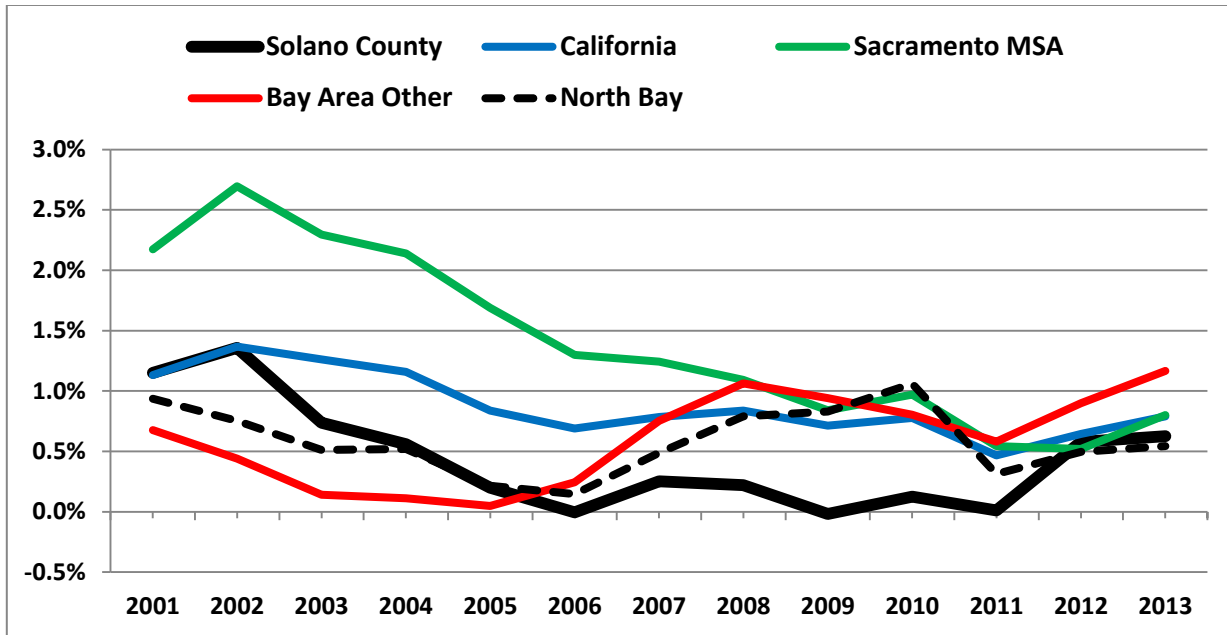
Source: Employment Development Department, Occupations Data (www.edd.ca.gov)

TAKEAWAY: Solano County is a place where labor, across most occupations, is less expensive for similar jobs than other areas throughout the Bay Area.

WHAT IS IMPORTANT: Relatively lower wages is just one component of a business' choice to move into an area. Solano County has maintained relatively low labor costs, which can attract businesses. Relatively low labor costs also reflect the slower movement of Solano County's economy since 2010.



Population Growth



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Regional population growth is a sign of a growing regional economy. The growth of the Bay Area economy has attracted new residents from all over the world for work. Population growth has flattened somewhat in Solano County since 2012, growing by 0.63 percent or about 2,600 people. California grew at a slightly faster pace of 0.79 percent. Sacramento’s metro area (MSA) grew slightly faster also at 0.89 percent. Since 2010, Solano County has now seen its population grow by 1.22 percent, the latest census date. Sacramento and the state overall have grown in population about 1.9 percent each since 2010. Since 2010, the Bay Area grew its population by 2.67 percent. Since 2012, the Bay Area counties grew at 1.17 percent or 72,479 people. Sonoma and Napa counties combined grew at a slower pace of 0.54 percent or only 3,403 people since 2012.

Population Growth as Compared to 2013, Selected Areas (change in Total Population)

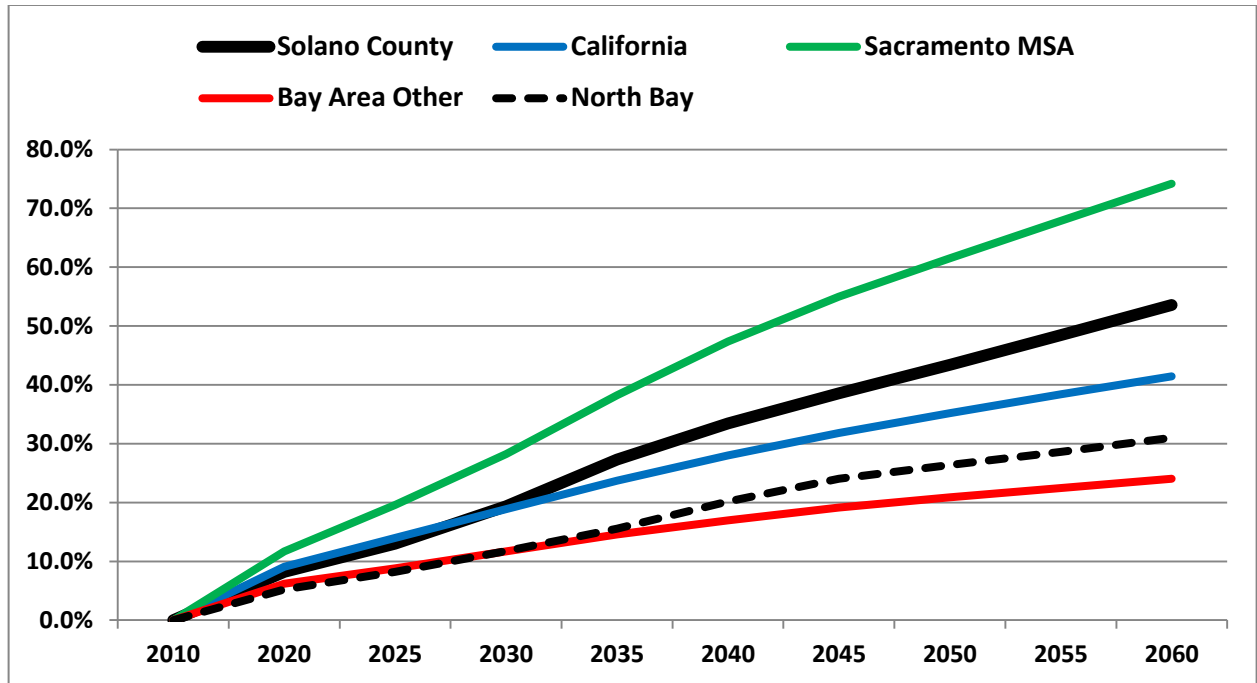
Place	2007	2010	2012	2007	2010	2012
Solano County	1.6%	1.22%	0.63%	6,389	5,043	2,600
California	4.3%	1.91%	0.79%	1,566,795	712,515	297,667
Sacramento MSA	4.9%	1.87%	0.80%	110,633	43,926	18,966
Rest of Bay Area	5.6%	2.67%	1.17%	332,083	163,400	72,479
North Bay	4.1%	1.36%	0.54%	24,790	8,444	3,403

Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

TAKEAWAY: Solano County’s population is growing slowly compared to regional areas.

WHAT IS IMPORTANT: Rising population is an indicator of economic growth, thus all the population growth data in the selected areas corroborate the economic data that the regional economy is getting stronger.

Population Growth Projections



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

California’s population is projected to grow more slowly than Solano County or the Sacramento MSA population. However, this growth will accelerate for Solano County after 2030; the predicted growth from the California Department of Finance is that Solano will stay on pace with the state overall between 2013 and 2030. The North Bay counties (Sonoma and Napa) are also included here, as is the Bay Area beyond Solano County.

TAKEAWAY: The population growth rates of Solano County and Sacramento County are faster than California and the Bay area otherwise.

WHAT IS IMPORTANT: Much of Solano County’s projected growth is due to current assumptions about the ethnic mix, where more Hispanic residents are assumed coming to California outside the Bay Area, Solano and Sacramento. These assumptions primarily involve presumed, cultural differences that favor more children per household for Hispanic families.

Place	Population Growth Projections 2020-2060, Selected Areas								
	2010 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	2035 - 2040	2040 - 2045	2045 - 2050	2050 - 2055	2055 - 2060
Solano County	8.2%	4.5%	5.6%	6.6%	4.8%	3.8%	3.5%	3.5%	3.4%
California	9.1%	4.4%	4.3%	4.1%	3.5%	3.0%	2.6%	2.4%	2.2%
Sacramento MSA	11.7%	7.0%	7.3%	7.8%	6.6%	5.2%	4.2%	3.9%	3.7%
Rest of Bay Area	6.2%	2.4%	2.7%	2.6%	2.1%	1.8%	1.5%	1.3%	1.3%
North Bay	5.2%	2.8%	3.3%	3.4%	4.0%	3.2%	1.9%	1.7%	1.9%

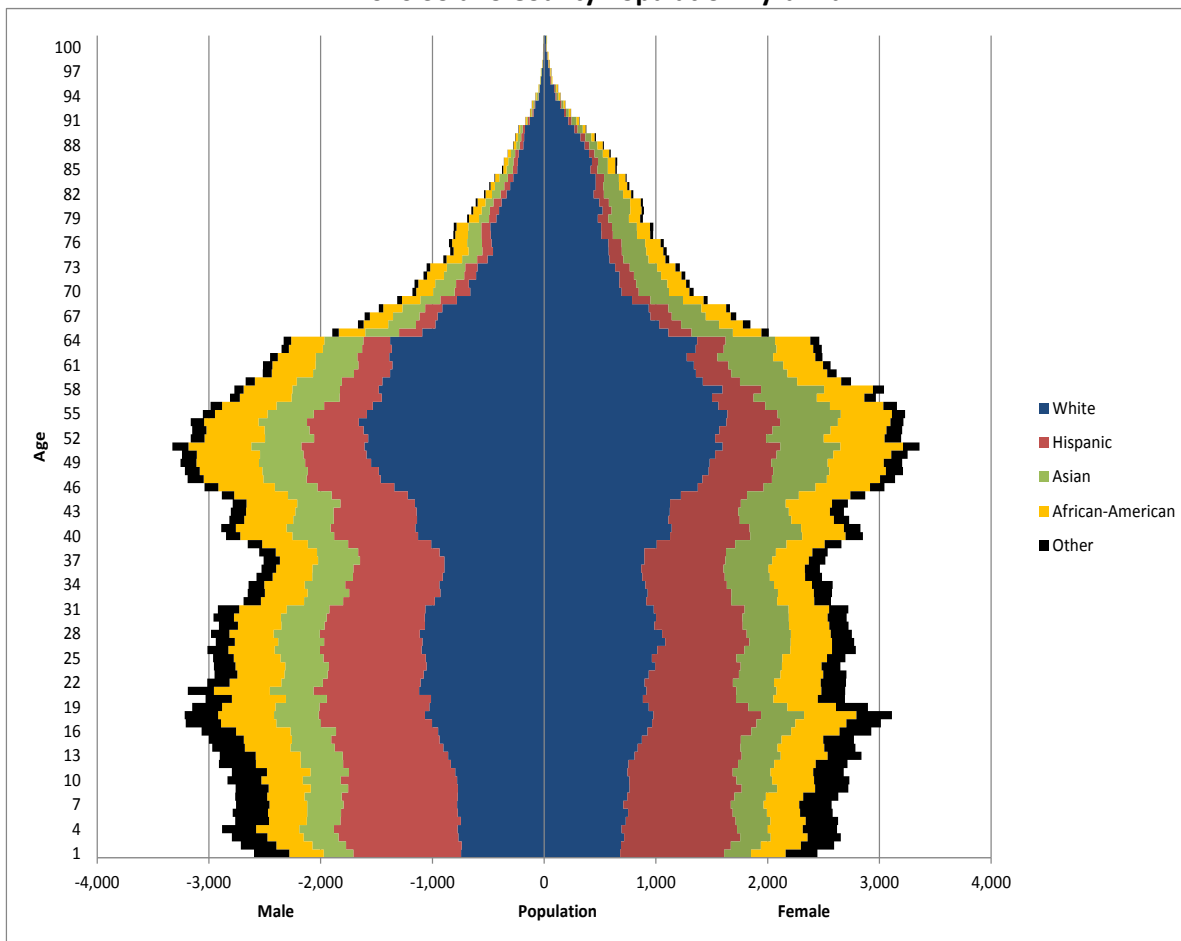
Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Population Changes by Age and Ethnicity, 2010-2050

The California Department of Finance (DOF) provides projections for all counties in California. These projections are split into categories based on ethnicity, age, and gender through 2060. One way to compare and contrast population data for past years and those projected is through the use of population pyramids. These pyramids are a common tool in demographic research to look at age (the vertical axis) and gender mix (where females are positive and males are negative values on the horizontal axis). By using color differences within the pyramid, we can also look at ethnicity and show population dynamics in one figure; colored areas represent each ethnic group's proportion of that year's population.

The following figures show these data for Solano County from 2010, 2030 and 2050. For Solano County, the Census data from 2010 stated that 41 percent of Solano's population was white, 24 percent was Hispanic, 14.3 percent was Asian, and 14.1 percent was African-American.

2010 Solano County Population Pyramid



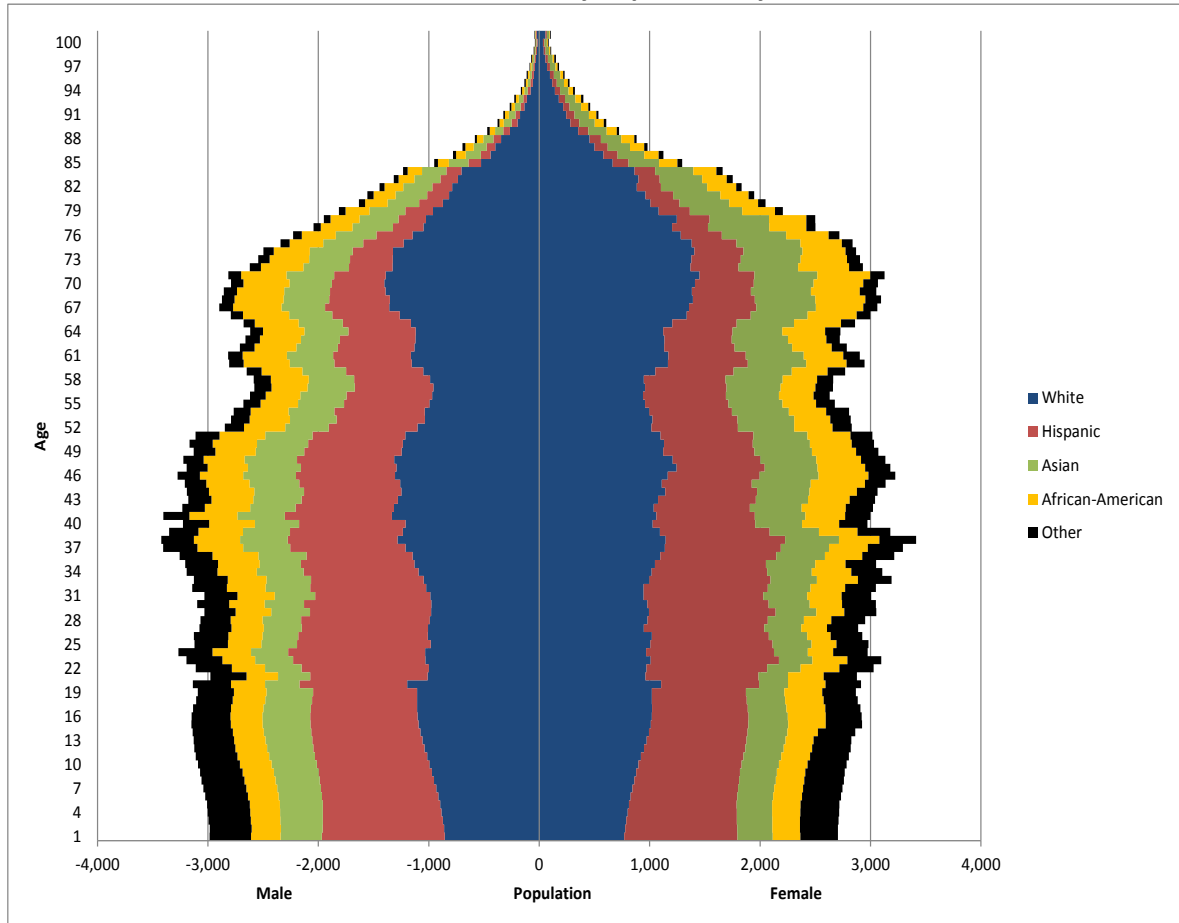
Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Over 20,000 people in Solano County answered multi-race in the Census data, with the rest either American Indian or Pacific Islander. The largest quintile of ages, or 20-year age spans, was between 40-59 and represented 29 percent of Solano's population.

Population Changes by Age and Ethnicity, 2010-2050 (cont.)

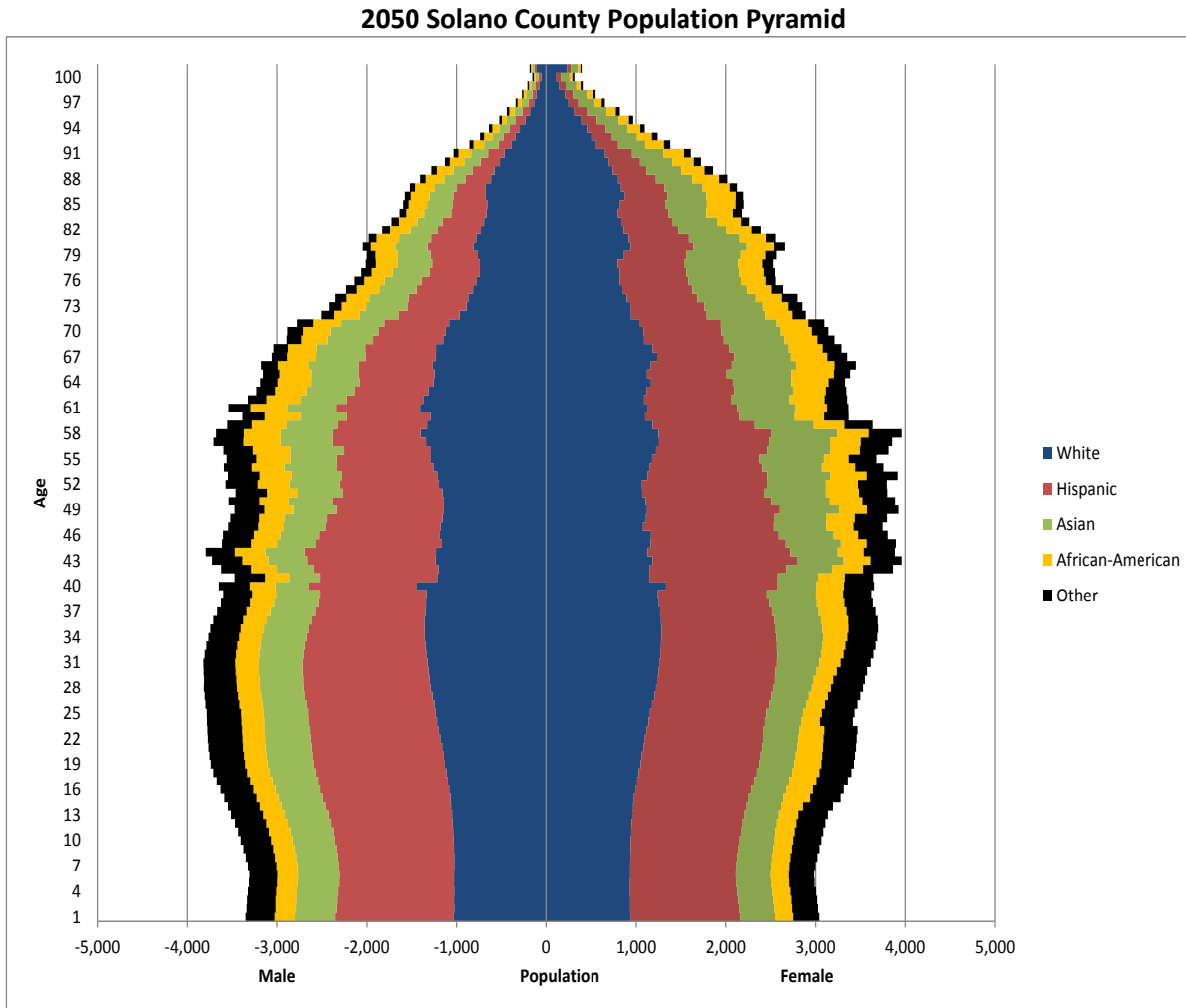
The prediction in 2030 is that Solano County will be 38 percent White, 27.7 percent Hispanic, 14.6 percent Asian, and 11.7 percent African-American. Over 32,800 people are predicted to claim a multi-race heritage. The largest age quintile will be 30-50. In 2050, the Hispanic and White population will be very similar in proportions, and the 40-60 year olds will be the dominant age group again. Most of this is based on Hispanic population growth between 2010 and 2025, then having children, and then remaining in place; such change makes the shape of the pyramid more uniform between ages 40 and 60.

2030 Solano County Population Pyramid



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Population Changes by Age and Ethnicity, 2010-2050 (cont.)



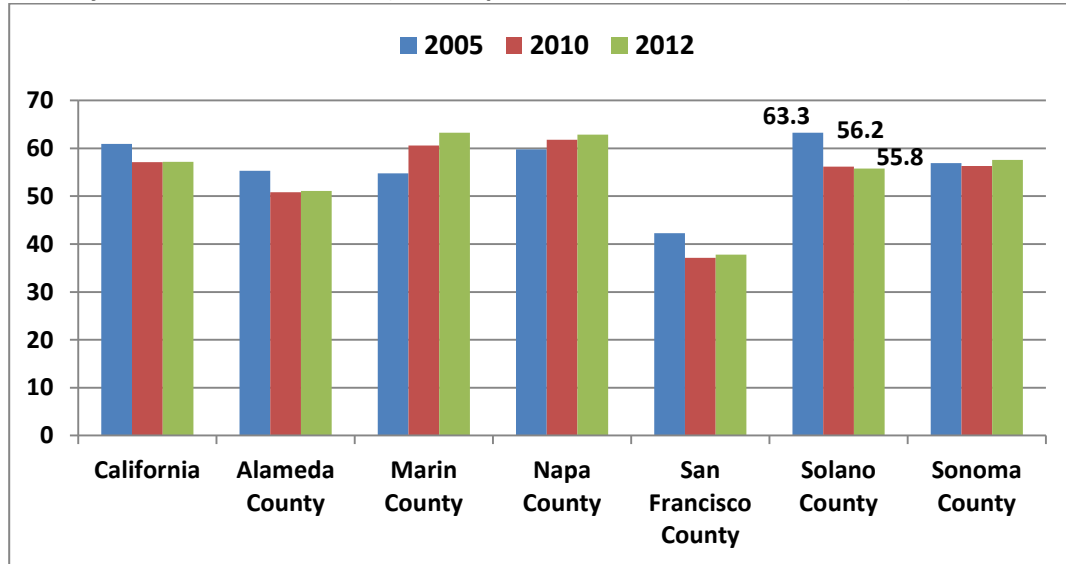
TAKEAWAY: Solano County’s population is projected to be more ethnically diverse, mainly through the growth of the Hispanic/Latino population.

WHAT IS IMPORTANT: Ethnic diversity already in Solano County and coming in the future will change the labor force mix, training needs, and may also change the mix of businesses to serve more diverse cultures.

Dependency Ratios

Dependency ratios show how many people will be over 65 and less than 18 years of age as a ratio of the entire population. The idea behind the dependency ratio is to measure the working-age population in reverse. As the dependency ratio rises, there are fewer residents who are of classic working age (18-64 years old). The dependency ratio can also be a measure of government services and funds demand, under some assumptions about children attending public school and that at 65 years old people depend more on social security, Medicare, and other government programs to supplement their income.

Dependency Ratios, Selected Areas (% of Population under 18 and 65 and over), 2005, 2010, 2012

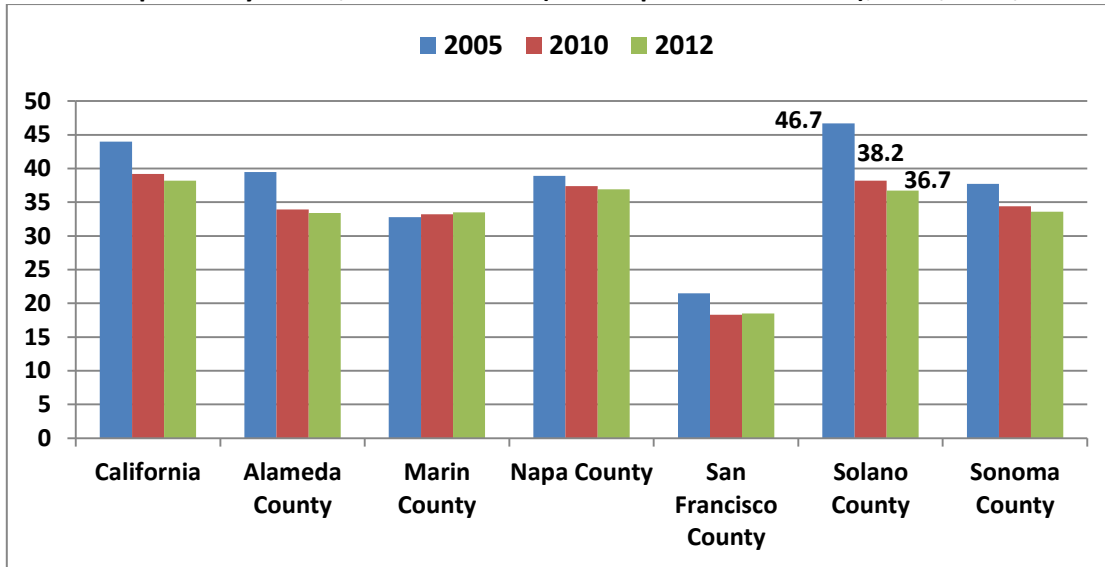


Source: Census Bureau (www.census.gov) at factfinder2.census.gov

Notice that since 2005, Solano County has seen a drop in its dependent population, though since 2010 there has been slower downward movement. Sonoma County, Napa County and Marin County are all rising due to more children and older residents to these areas versus others. San Francisco, Alameda and California overall have had similar movements to Solano County, though Solano saw a drop in 2012 versus San Francisco and Alameda which saw a bit of a rise. The charts on the next page look at how much of this dependency is based on child birth and how much is based on older residents. Notice Marin County is the only one in this set that has seen a small increase over time. The other areas have seen fewer children less than 17 years of age. In terms of older residents, the North Bay counties and Marin County have all become older.

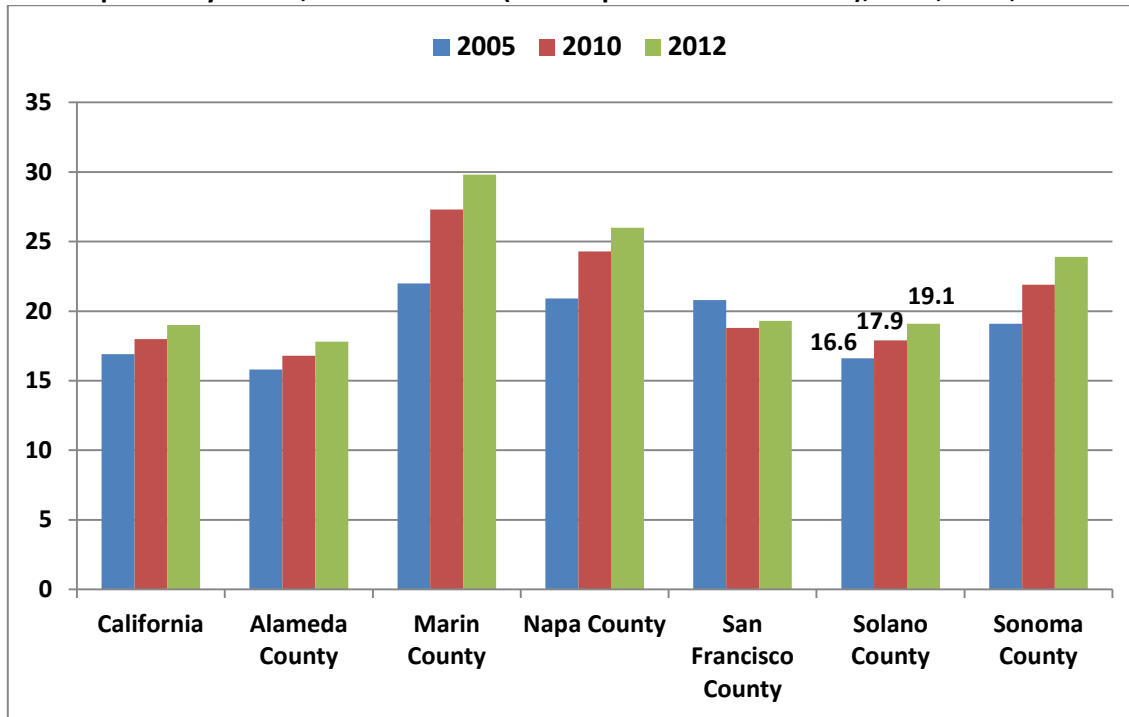
Dependency Ratios (cont.)

Child Dependency Ratios, Selected Areas (% of Population under 18), 2005, 2010, 2012



Source: Census Bureau (www.census.gov) at factfinder2.census.gov

Dependency Ratios, Selected Areas (% of Population 65 and over), 2005, 2010, 2012

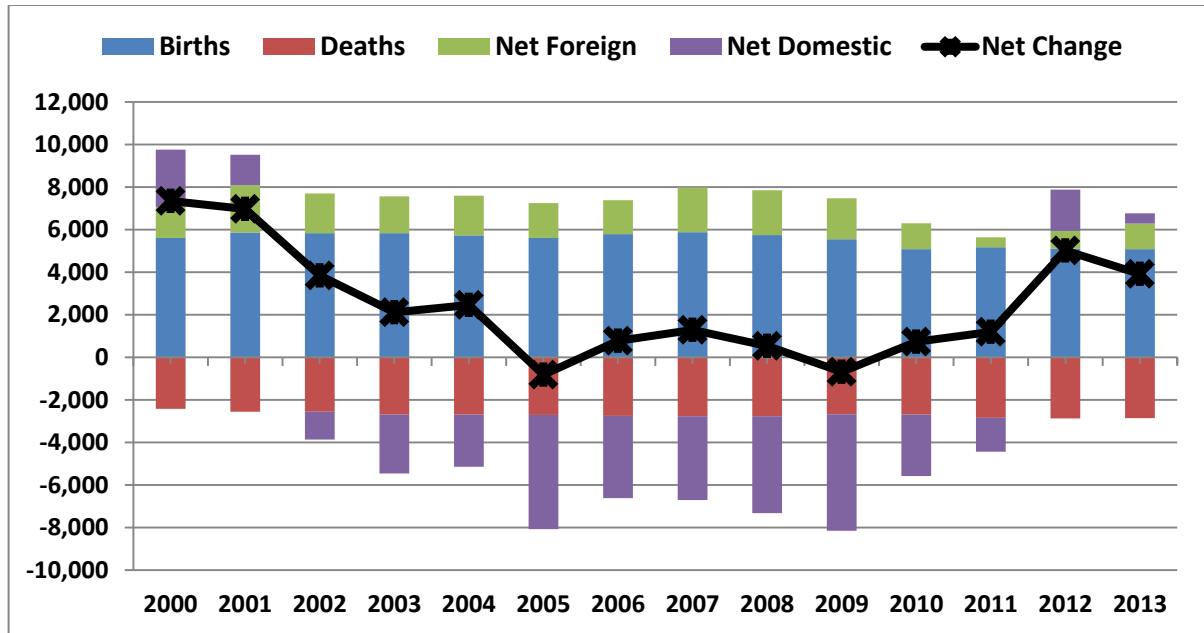


Source: Census Bureau (www.census.gov) at factfinder2.census.gov

TAKEAWAY: Solano County's population growth is growing a larger working-age population since 2005.

WHAT IS IMPORTANT: If this trend continues, there will be more working-age residents in Solano County as the population continues to grow, even though Solano County is aging overall.

Components of Population Change



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

In 2013, Solano County saw an increase in “net domestic” immigration or the net flow of people to Solano County and other parts of the United States. Net foreign immigration continues to rise and was larger in 2013 versus net domestic immigration. Approximately 1,193 people moved to Solano County from other countries in 2013, and only 485 came from other parts of the United States. Births fell slightly in 2013 as compared to 2012, and deaths also fell slightly. The fast reduction of net domestic migration was the largest factor in 2013 with respect to population change.

Change in Population Change Components as Compared to 2013, Solano County (% change)

Year	Births	Deaths	Net Foreign	Net Domestic	Net Migration	Net Increase
2007	-13.5%	3.2%	-43.4%	-112.3%	-191.4%	-28.2%
2010	0.0%	6.3%	-1.4%	-116.8%	-200.0%	-7.1%
2012	-0.6%	-0.9%	44.3%	-75.0%	-39.3%	-0.4%

Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Since 2010, net foreign migration has been a net positive of 3,702 people to Solano County, while there has been an outflow of 2,069 people to other parts of the United States, for a net migration of an additional 1,633 people. The population’s natural increase, the difference between births and deaths, has grown Solano’s population by 9,235 people.

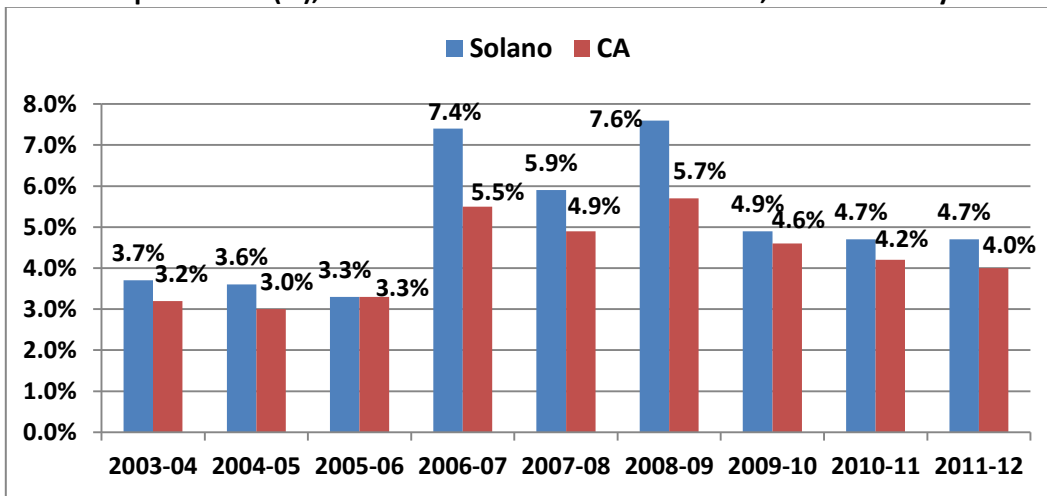
TAKEAWAY: Solano County’s population grew in 2013 due to both natural increase and net immigration to Solano County.

WHAT IS IMPORTANT: Because foreign immigrants came to Solano County more quickly in 2013 than in 2012, and are the main reason for positive net migration in 2013, local schools and businesses should prepare for changing demands in support of these new residents.

Dropout Rates Compared to California

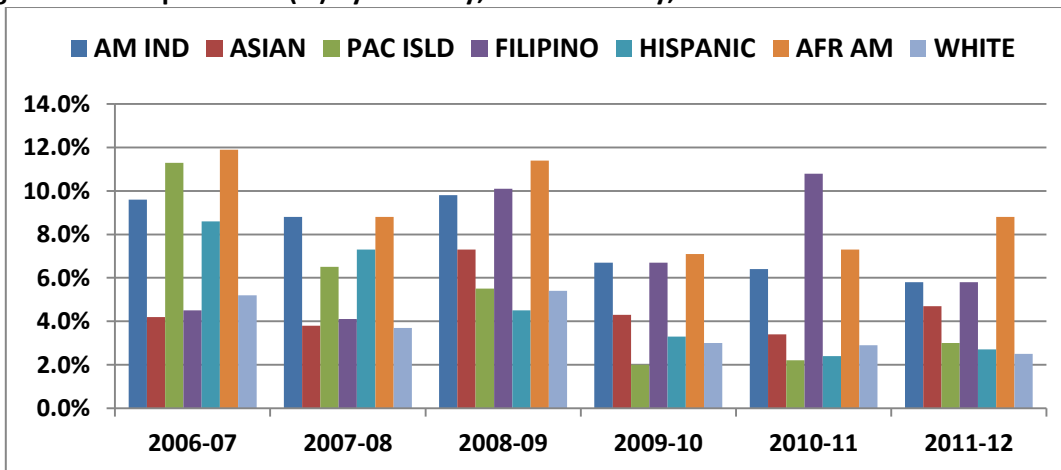
Dropout rates in Solano County have fallen since recent high rates in 2008-2009 academic years. As compared to the State of California, Solano County still has a relatively large dropout rate; California is reporting its statewide dropout rate at 4 percent versus Solano at 4.7 percent in 2011-12. From an ethnicity viewpoint, there have been some positive trends since 2006-07, especially for Pacific Islander, Hispanic and White students. African-American dropout rates remain relatively high compared to other groups in Solano schools, and Asian students have rising dropout rates versus rates trending down. In the 2011-12 academic year, the dropout rate for African-American students is 8.8 percent, over double the average dropout rate for California and 87 percent higher than Solano average.

High School Dropout Rates (%), 2003-04 to 2011-12 Academic Years, Solano County and California



Source: California Department of Education (cde.ca.gov)

High School Dropout Rate (%) by Ethnicity, Solano County, 2006-07 to 2011-12 Academic Years



Source: California Department of Education (cde.ca.gov)

TAKEAWAY: Dropout rates have fallen, but African-American, Filipino and American-Indian high-school students have higher dropout rates.

WHAT IS IMPORTANT: Asian students have experienced declining dropout rates.

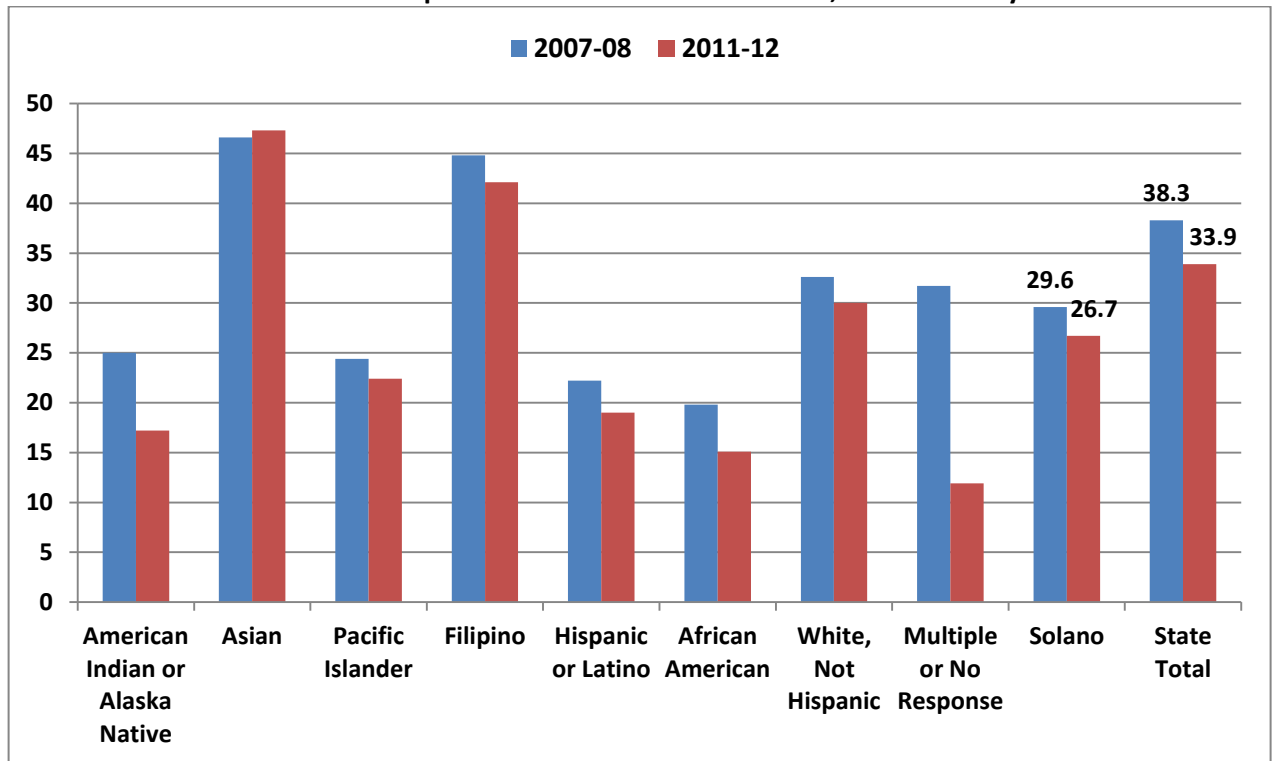
Graduation Rates and UC/CSU Ready Graduates

Solano County slightly lags behind the state of California somewhat in overall graduation rates; in 2011-12, Solano County had 78.1 percent of graduating seniors eligible to attend either type of campus, where California was 78.9 percent. This gap has closed from just two years ago when California was 2.7 percent higher than Solano County in terms of UC/CSU ready graduates.

The state of California has 23 state universities and 10 UC campuses. One of the larger workforce concerns in many counties going forward is that graduating high-school students are made ready to attend one or both of those systems' institutions. Both Solano County and the State of California, since 2009-10, have shown an increase in the number of students who are eligible to attend either UC or CSU campuses upon high-school graduation. However, the number of students in Solano County has fallen compared to 2007-08 overall in terms of UC/CSU ready seniors. This is also true for the state overall.

Looking at the ethnicities of seniors, Asian students are the only ethnic group in Solano County that has shown an increase in UC/CSU ready seniors as compared to 2007-08. All other ethnicities have seen a decrease. It is important to recognize that these changes are relatively small, in many cases less than two percent higher or lower. The key idea is that by not trending higher across the board, there are fewer students that are UC/CSU ready, and those trends may be more problematic for some ethnic groups than others.

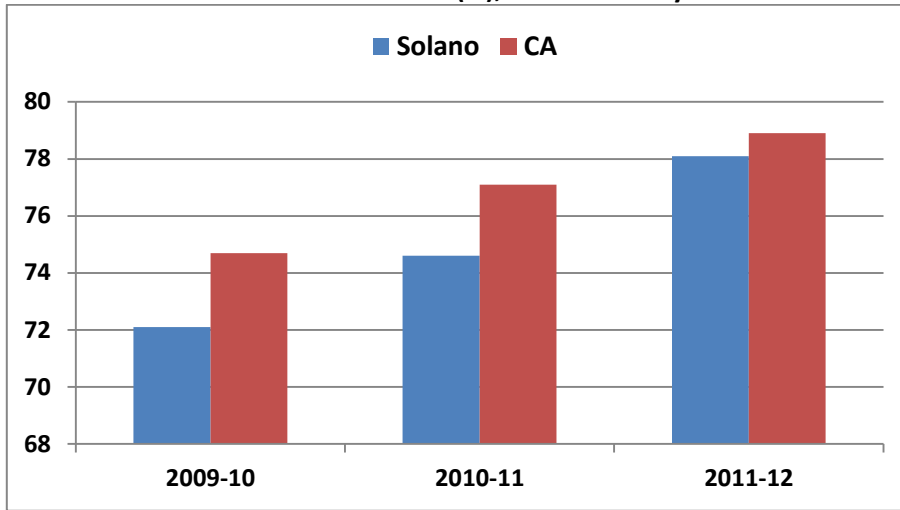
Percent of High-School Graduates that Are UC/CSU Ready, 2007-08 Compared to 2011-12 Academic Years, Solano County



Source: California Department of Education (www.cde.ca.gov)

Graduation Rates and UC/CSU Ready Graduates (cont.)

Graduation Rates (%), Solano County



Source: California Department of Education (cde.ca.gov)

Note: There was a methodological change at the Department of Education that does not allow a comparison before 2009-10 with the most recent data

Graduation Rates by Ethnicity, 2011-12

Ethnicity	Solano County	California	Difference
American Indian or Alaska Native, Not Hispanic	79.1	72.4	6.7
African American, Not Hispanic	68.5	66.0	2.5
Two or More Races, Not Hispanic	85.8	84.0	1.8
White, Not Hispanic	85.8	86.6	-0.8
Asian, Not Hispanic	88.9	91.1	-2.2
Hispanic or Latino of Any Race	71.0	73.7	-2.7
Filipino, Not Hispanic	86.7	90.8	-4.1
Pacific Islander, Not Hispanic	69.2	77.0	-7.8

Source: California Department of Education (cde.ca.gov)

Note: There was a methodological change at the Department of Education that does not allow a comparison before 2009-10 with the most recent data

TAKEAWAY: Graduation rates are lower in Solano County versus California, but Solano County graduates African-American students at a higher percentage than the state overall.

WHAT IS IMPORTANT: Solano County still has a large gap between its student readiness for UC or CSU admission versus the state, but that gap has become smaller since the 2007-08 academic year.

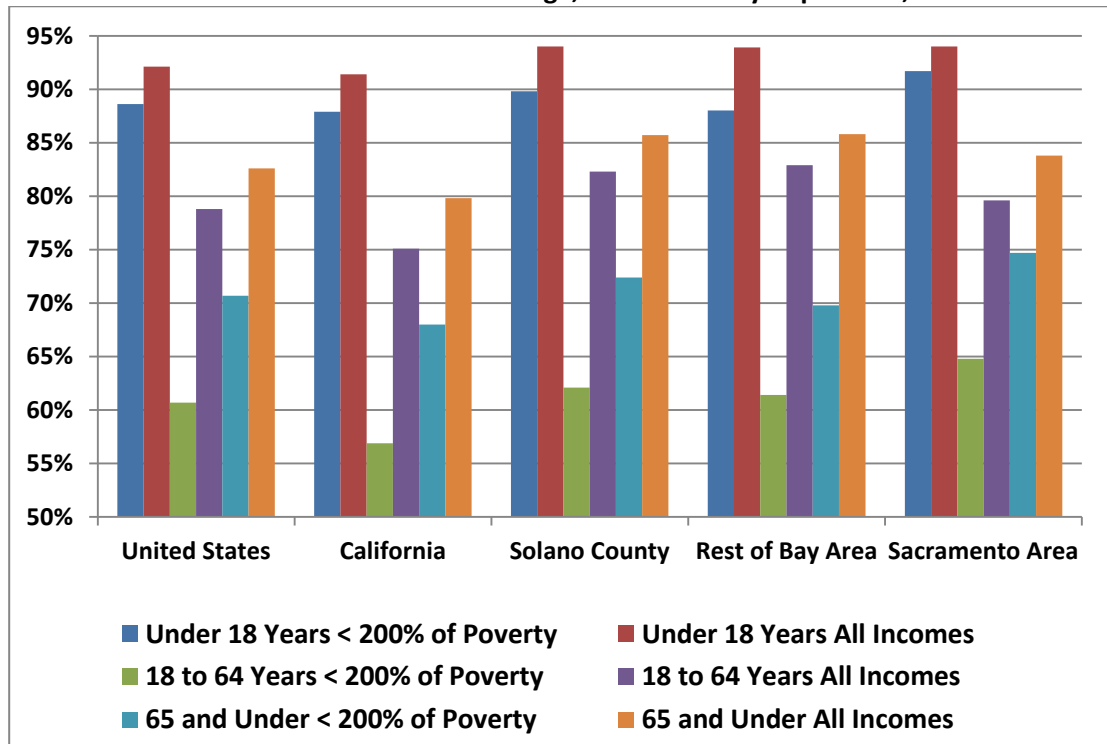
Health Insurance Coverage

Solano County compares favorably to almost all other comparison areas in terms of health insurance coverage for different age groups and income levels. For residents 18 and under, 94 percent of them were covered by health insurance. For those who are less than 200 percent of the poverty income level in 2011 (which was \$10,890 for a single person and \$22,350 for a family of four in 2011), the coverage level was 89.8 percent. For those between 18 and 64, 82.3 percent were covered; for all those under 65 years of age at all incomes levels, the coverage was 85.7 percent. For the 18 to 64 year old age group and under 200 percent of the poverty income level, the coverage was 62.1 percent. Solano still ranks above the state and national average for coverage here also.

The next figure looks at changes in health coverage from 2006 to 2011. Solano outpaces for those 65 years and younger, though the Bay Area does a better job on providing health coverage for those at lower incomes since 2006. Children under 18 are covered generally across all comparable regions.

The introduction of the Affordable Care Act (ACA) in 2014 will likely make these numbers all rise in coming years and may also make tracking this statistic less informative as how Solano is progressing now that national legislation for health insurance provision exists.

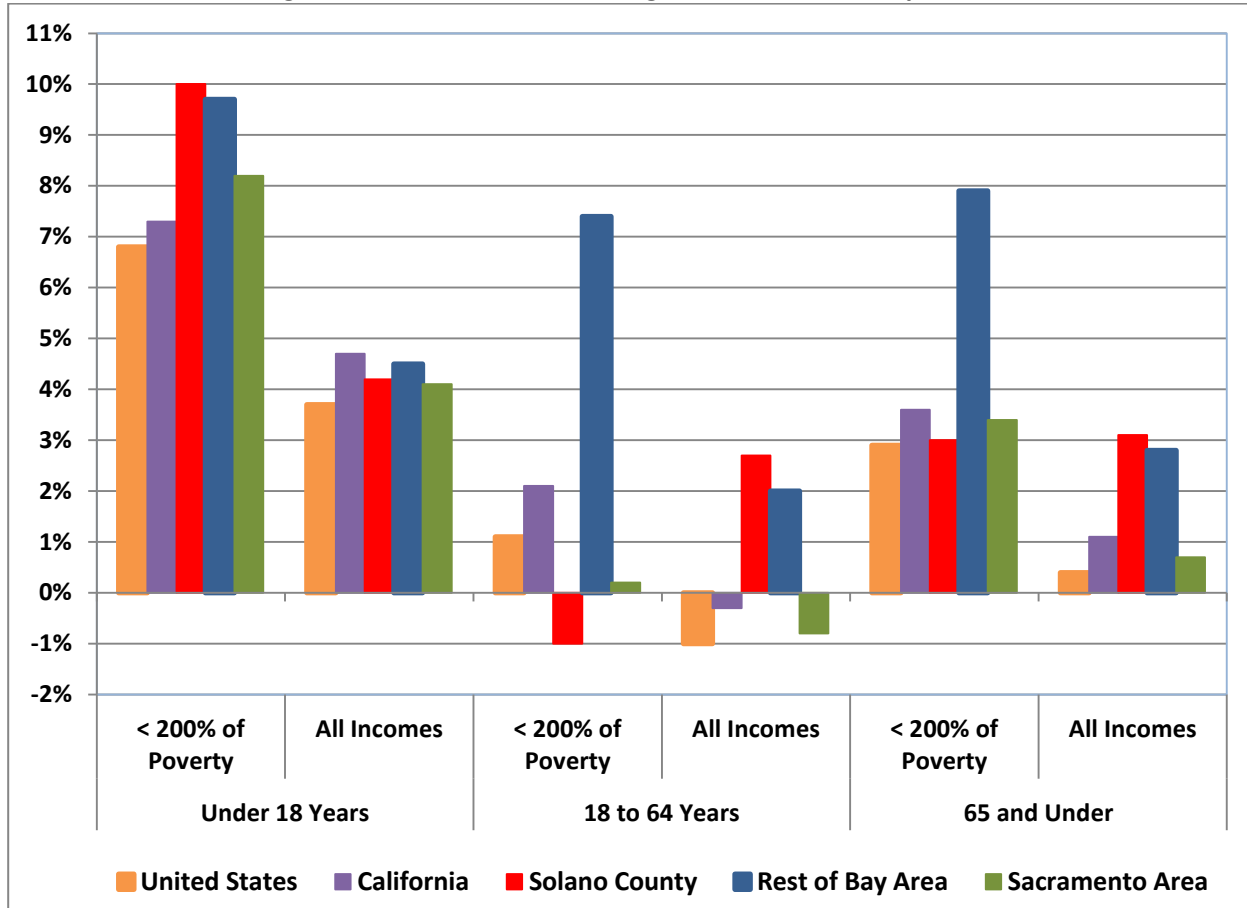
Percent Health Insurance Coverage, Solano County Population, 2011



Source: SAHIE (Small Area Health Insurance Estimates), Census Bureau, www.census.gov/did/www/sahie/

Health Insurance Coverage (cont.)

Percent Change in Health Insurance Coverage, Selected Areas Population, 2006 - 2011



Source: SAHIE (Small Area Health Insurance Estimates), Census Bureau, www.census.gov/did/www/sahie/

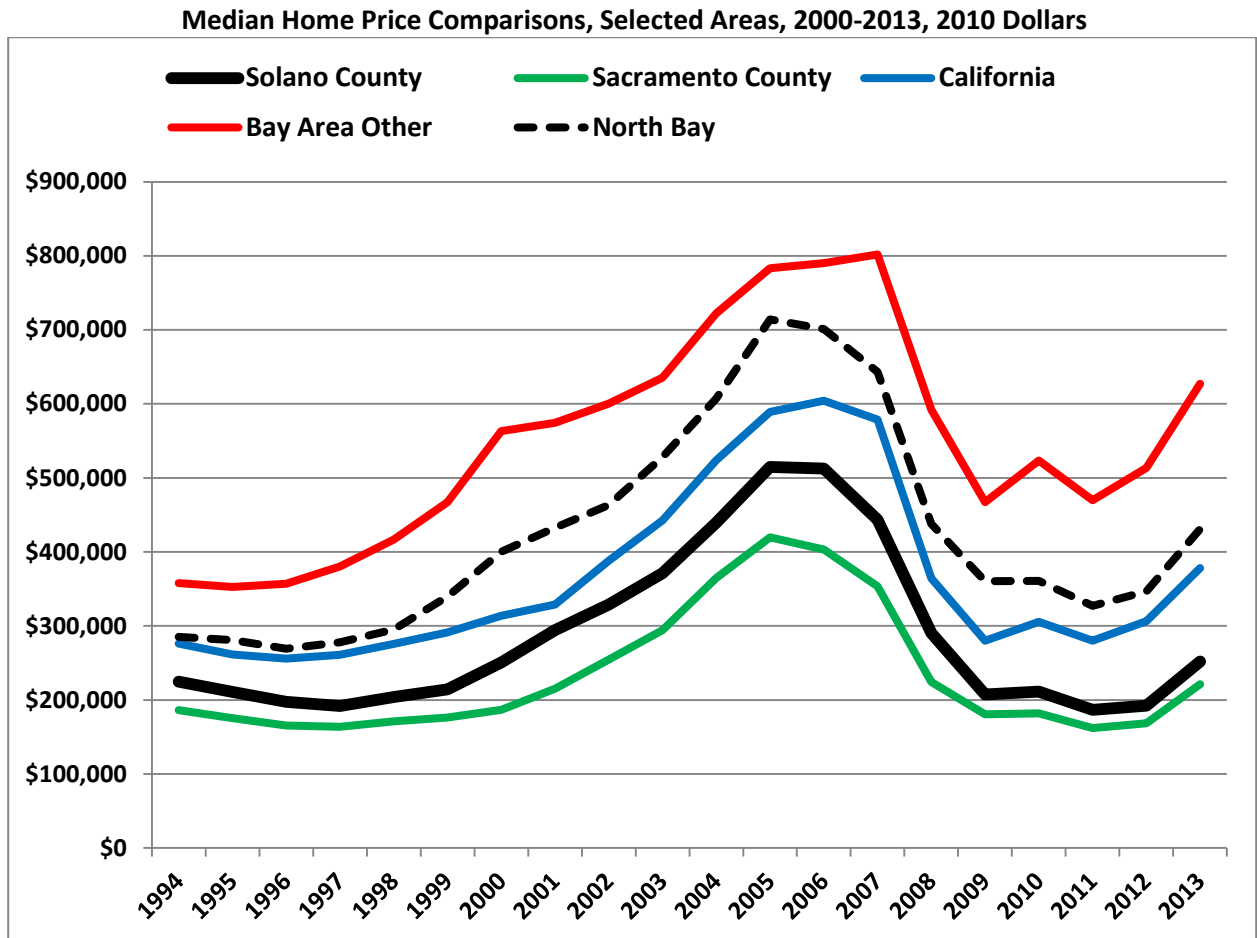
TAKEAWAY: Solano County does a good job, through its health care networks, public health and businesses, in providing health insurance and health care options for its residents, regardless of age or income level versus the region and California overall.

WHAT IS IMPORTANT: The Affordable Care Act may confound this data as a true indicator of community progress going forward; there will be more coverage by national policy and not by local choices and markets.

Median Home Prices

2013 was an amazing, comeback year for Solano County and regional housing markets. The entire state of California rebounded in almost every marketplace for housing. With continued income and job growth, Californians are moving back toward homeownership and median home prices rose as a result of this increase in demand. Solano County housing prices began to grow in earnest in 2012 and followed regional and state trends in 2013. The North Bay counties are seen here to be relatively expensive neighbor to Solano County; Sacramento’s housing market is less expensive than Solano County’s market. Solano County’s median home prices are also lower than California on average.

Solano County’s housing prices seem to follow Sacramento’s housing market most closely. Notice the shape of change for both those markets since 2000 in the figure. The rapid increase in housing prices between 2000 and 2007 is seen in this figure also, where all regions showed relatively rapid change. The figure below shows real housing prices (with inflation removed) back to 1994 for Solano County and other selected areas.



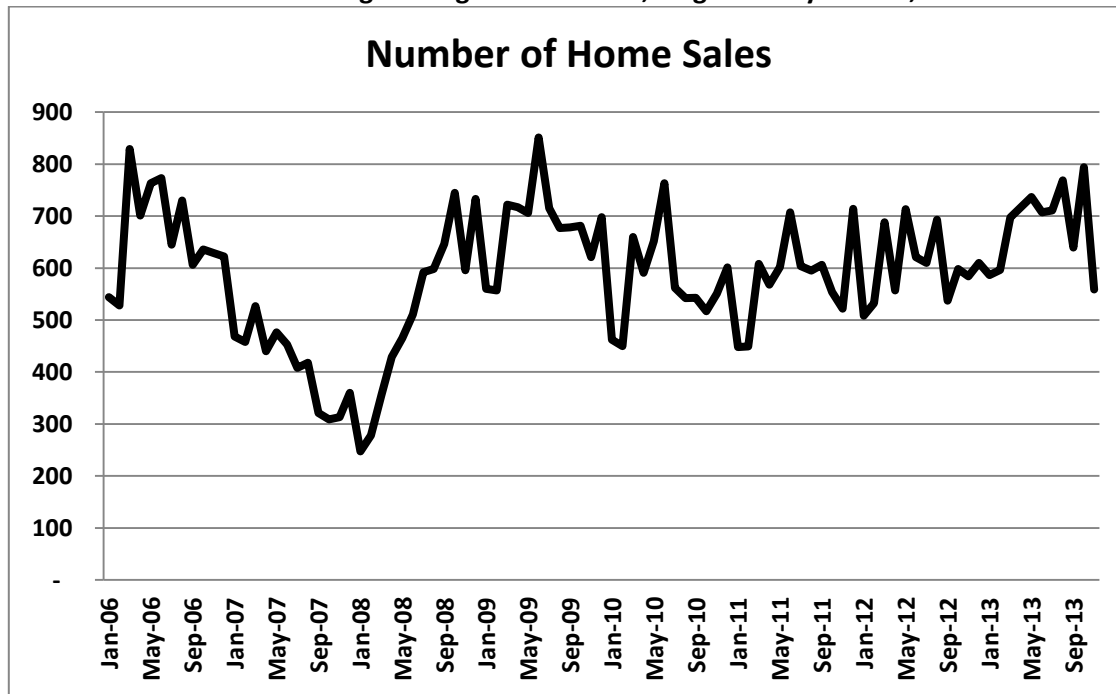
Sources: DataQuick and California Association of Realtors

Note: Sacramento County is shown here alone because there is not similar data over time for Yuba, Yolo, and Sutter counties.

Median Home Prices (cont.)

Since 2010, Solano County’s median home price grew by 31.5 percent; the lowest, monthly price – according to the California Association of Realtors – was in February 2012 at \$179,020. The median home price is now \$280,360, a 56.6 percent increase as of November 2013. For the state of California, the bottom was hit in February 2009, and median prices have grown 72 percent since that date. In Napa County, housing prices have gone up 72 percent since the trough was hit in April 2011. In Sacramento, the bottom was hit in January 2012 and prices have gone up 53 percent since.

Year on Year Percentage Change in Unit Sales, Single-Family Homes, 2006-2013



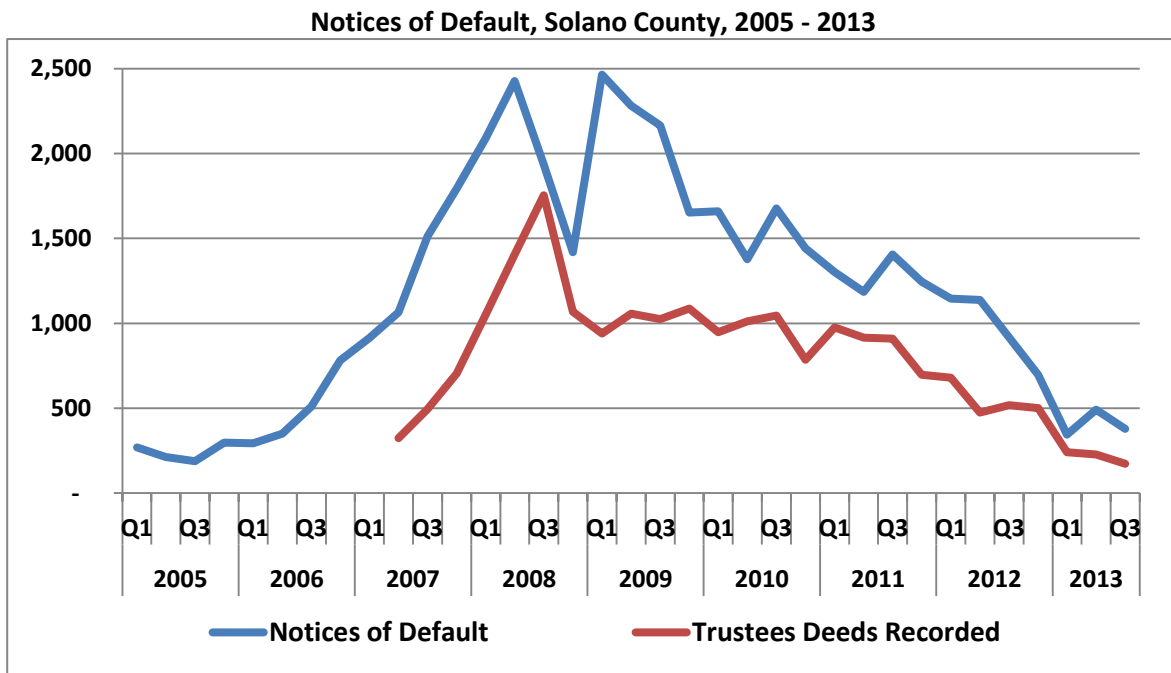
Sources: DataQuick and California Association of Realtors

TAKEAWAY: 2013 was a breakout year for residential real estate in Solano County and California, which further suggests Solano County continues to emerge from the housing recession.

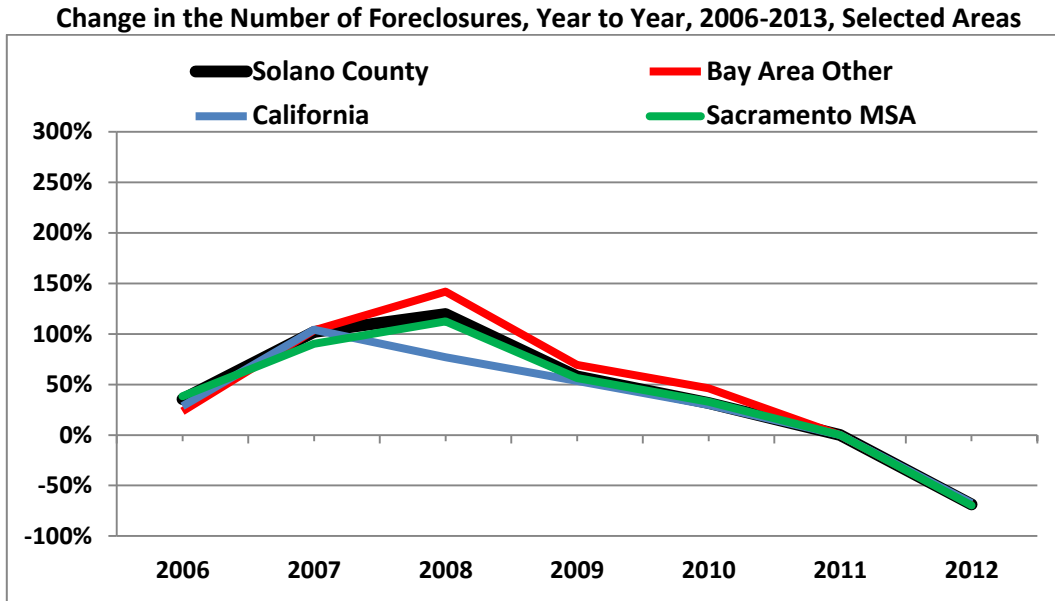
WHAT IS IMPORTANT: Home prices rising are both a blessing and curse. Rising home prices increase wealth of homeowners but also reduce housing affordability.

Foreclosure Activity

The foreclosure wave continues to ebb across California, as there has been less foreclosure activity. As foreclosures and bank-owned properties have been reduced in quantity by rising housing demand, the number of units available at relatively low prices has dried up. Prices have risen quickly as a result. As compared to 2007, foreclosures are down across Solano County (-37.2 percent), the rest of the Bay Area (-36.3 percent) and across California (-37.5 percent). 2007 is when the foreclosure wave began in earnest. The figure shows the activity is now below 2006 levels. As for notices of default, the trend continues in Solano County to fall and it walks in parallel with foreclosures and housing prices rising. Generally, these two data points are leading indicators of home prices; as default notices continue to fall, housing prices are likely to remain at current levels or continue to rise.



Foreclosure Activity (cont.)



Sources: DataQuick and California Association of Realtors

TAKEAWAY: Notices of Default are down in 2013, signaling continued growth in housing market prices.

WHAT IS IMPORTANT: The housing recession, triggered by a surge in notices of default, has multiple signs of now being over.

Housing Affordability: Housing Prices Versus Median Household Income

The California Association of Realtors provides a way to look at housing affordability through what they call a “Housing Affordability Index” or HAI. The HAI basically takes the household income data and the cost of purchasing a home (mortgage, average cost of utilities and maintenance, etc.), and then derives a percentage for the population that could afford to buy a home at the current median home price. As with the wage affordability data shown in the “Our Changing Economy” section, these data may also be a business attractant in that home prices being relatively affordable suggest the cost of retaining workers is lower. Rising or relatively high home prices in a specific area may lead to rising wage demand by workers.

As these data show, Solano County remains a relatively affordable housing market versus the state average, Sacramento County, and the greater Bay Area. The data tracking Solano County only started in 2010 as a stand-alone county. However, these data provide another way to track community progress in terms of local housing affordability for potential and current residents. Comparisons here are shown by county rather than metropolitan statistical area because data are reported by county.

Housing Affordability Index, 2010 Q1 to 2013 Q3, Percent of Pop that Can Afford Median Priced Home

Quarter	Solano	Sac	Calif	Napa	Sonoma	Alameda	Santa Clara	Contra Costa	Marin	San Francisco
2010.3	71%	68%	46%	41%	40%	31%	30%	21%	23%	22%
2011.3	75%	72%	52%	48%	46%	36%	34%	27%	25%	26%
2012.3	77%	73%	49%	45%	46%	34%	32%	28%	27%	25%
2013.3	56%	50%	32%	28%	24%	21%	21%	18%	18%	16%

Source: California Association of Realtors (<http://www.car.org/marketdata/data/haitraditional/>)

TAKEAWAY: Solano County is a relatively, less-expensive housing market as compared to the Bay Area, Sacramento, and California overall.

WHAT IS IMPORTANT: These data may be a sign that Solano County has room to grow in terms of median home price and relatively lower housing prices may be used as a business attraction and retention tool.

City Overview: Demography, Housing and Incomes

To complete our look at the progress of Solano County’s communities, the 2013 Index compares and contrasts Census Bureau data from the Census 2000, Census 2010, and recent American Community Survey (ACS) data (2012) on Solano County’s cities. These data compare Solano County to California and to the United States overall. The ACS data is meant to provide updated Census-like information between the 10-year Census dates. There are three sets of data shown below as a way to provide a further view at Solano County’s communities and their progression.

Median Age in Solano County and Its Cities

Place	2000	2010	2012
Solano County	33.9	36.5	37.0
United States	35.3	36.9	37.2
California	33.3	34.9	35.2
Benicia	38.9	45.0	43.9
Dixon	31.5	32.3	33.7
Fairfield	31.1	32.8	32.5
Rio Vista	40.7	55.8	59.8
Suisun City	31.7	32.7	33.4
Vacaville	33.9	36.7	37.5
Vallejo	34.9	37.5	38.0

Source: Census Bureau (factfinder2.census.gov)

Housing and Occupancy

(How many homes are there and how many are occupied or vacant)

Place	Total Housing Units			Occupied			Vacant		
	2000	2010	2012	2000	2010	2012	2000	2010	2012
Solano County	134,513	134,513	134,513	96.9%	91.7%	91.9%	3.1%	8.3%	8.3%
United States	115,904,641	115,904,641	115,904,641	91.0%	87.8%	87.5%	9.0%	12.2%	12.2%
California	12,214,549	12,214,549	12,214,549	94.2%	91.4%	91.2%	5.8%	8.6%	8.6%
Benicia	10,547	10,547	10,547	97.9%	91.7%	93.4%	2.1%	8.3%	6.6%
Dixon	5,172	5,172	5,172	98.1%	94.2%	92.9%	1.9%	5.8%	7.1%
Fairfield	31,792	31,792	31,792	97.1%	91.7%	92.8%	2.9%	8.3%	7.2%
Rio Vista	1,974	1,974	1,974	95.3%	92.7%	89.0%	4.7%	7.3%	11.0%
Suisun City	8,146	8,146	8,146	98.0%	93.3%	94.3%	2.0%	6.7%	5.7%
Vacaville	28,696	28,696	28,696	97.9%	94.4%	94.4%	2.1%	5.6%	5.6%
Vallejo	41,219	41,219	41,219	96.1%	88.9%	88.7%	3.9%	11.1%	11.3%

Source: Census Bureau (factfinder2.census.gov)

The first is a median age comparison to show how Solano County and its cities compare to California and the United States overall in terms of an aging population. Benicia and Rio Vista are significantly older populations than other cities in Solano County.

City View: Demography, Housing and Incomes (cont.)

The second is housing units, comparing occupied versus vacant housing. Solano County compares well overall, but Rio Vista and Vallejo have relatively high vacancy rates for housing. This suggests that those two cities do not attract or retain residents as easy as other cities or California overall. The nation has a higher vacancy rate than all of Solano County.

The third is median household income (MHI), average household sizes (AHS) in terms of people per household, and also the relative education levels of residents (the percent of residents who are high school graduates and the percent of residents who have a bachelor's degree or better).

Income and Education

Place	Median Household Income			Avg. Household Size			% of Residents with HS Diploma or Better			% of Residents with Bachelor's Degree or Better		
	2000	2010	2012	2000	2010	2012	2000	2010	2012	2000	2010	2012
Solano County	\$54,099	\$68,409	\$69,006	2.86	2.83	2.90	85.8%	86.7%	83.8%	24.0%	24.2%	21.4%
United States	\$41,994	\$51,914	\$53,046	2.59	2.61	2.59	85.0%	85.7%	80.4%	27.9%	28.5%	24.4%
California	\$47,493	\$60,883	\$61,400	2.89	2.93	2.87	80.7%	81.0%	76.8%	30.1%	30.5%	26.6%
Benicia	\$67,617	\$87,018	\$88,691	2.47	2.53	2.60	94.7%	93.8%	91.7%	41.2%	39.3%	37.3%
Dixon	\$54,472	\$69,742	\$72,406	3.11	3.00	3.17	82.1%	81.5%	77.5%	19.6%	19.3%	18.7%
Fairfield	\$51,151	\$68,009	\$66,363	3.07	3.00	2.98	84.8%	86.0%	85.0%	22.2%	23.4%	20.4%
Rio Vista	\$44,534	\$54,568	\$61,795	2.06	2.04	2.43	93.1%	93.5%	84.0%	25.3%	24.7%	16.6%
Suisun City	\$60,848	\$71,795	\$72,543	3.20	3.23	3.26	86.1%	85.6%	85.6%	19.3%	20.6%	17.3%
Vacaville	\$57,667	\$70,838	\$73,024	2.76	2.71	2.83	85.4%	86.8%	83.9%	21.0%	21.7%	19.4%
Vallejo	\$50,030	\$61,481	\$60,764	2.85	2.85	2.90	84.7%	86.1%	81.7%	24.7%	24.2%	21.1%

Source: Census Bureau (factfinder2.census.gov)

TAKEAWAY: Solano County is a relatively older county versus California on average, and many of the cities in Solano County are older still. Benicia, while older, has fewer vacant housing units, higher median incomes, smaller household sizes, and more Bachelor's Degree holders than other cities in Solano. Suisun City, Dixon and Vacaville have smaller proportions of college graduates, but have relatively high median incomes.

WHAT IS IMPORTANT: These data suggest that Solano's cities and the county overall are well-educated, have relatively fewer vacant homes, and are relatively young compared to the state and nation overall.

Data Sources and Methodology

Solano County Key Facts

Area

Data provided by the Solano Economic Development Corporation (EDC).

Population

Data are from the E-I: City/County Population Estimates with Annual Percent Change report by the California Department of Finance and for Solano County. Estimates are for July 1, 2013.

Jobs

Solano County employment data are provided by the California Employment Development Department, Current Employment Statistics (CES). The industry data may include employees who live outside the county. December 2013 data is preliminary.

Foreign Immigration and Domestic Immigration

Data are from the E-6: Population Estimates and Components of Change by County - July 1, 2010-2013 report by the California Department of Finance and are for Solano County, the Bay Area otherwise (including Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara Counties), the North Bay (Napa and Sonoma counties), and for California overall.

Estimates for 2013 are provisional. Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad, and the balance of hundreds of thousands of people moving to and from California from within the United States.

Adult Educational Attainment, Age Distribution, and Ethnic Composition

Data provided by the U.S. Census Bureau, American Community Survey 2012 for Solano County.

Economy: Our Changing Economy

Annual Employment

Solano County employment data are provided by the California Employment Development Department Current Employment Statistics (CES). The industry data reflects the number of jobs in the county that may pay employees who live outside of the county.

Change in Annual Jobs

Solano County employment data provided by the California Employment Development Department Current Employment Statistics (CES), the industry data reflect the number of jobs in the county that may pay employees who live outside of the county. The data are as of December 2013 and are estimates.

Total Employed Residents & Total Unemployed Residents

Solano County resident employment data is provided by the California Employment Development Department (EDD) Local Area Unemployment Statistics (LAUS). The data reflects the number of residents employed and unemployed in the county. Monthly data reports for Solano County and selected areas originate at the Bureau of Labor Statistics (www.bls.gov) and EDD reports the estimates.

Non-employer Firm Growth & Percentage of Non-employers by Industry

Data for Non-employers is from the U.S. Census Bureau. Non-employer statistics originate from tax return information of the Internal Revenue Service. The data are subject to tax forms data, as well as errors of response, non-reporting and coverage. Values provided by each firm are slightly modified to protect the respondent's confidentiality.

Median Household Income

Data for Median Household Income are from the 2005-2012 American Community Survey from the U.S. Census Bureau, including the decennial Census in 2010. All income values are inflation-adjusted and reported in 2010 dollars, using the California CPI from the California Department of Finance. This California CPI is a weighted average of consumer price index (CPI) the Bureau of Labor Statistics (BLS) reports for the San Francisco, Los Angeles, and San Diego metropolitan areas.

Real per Capita Income

Total personal income and population data are from the Bureau of Economic Analysis (www.bea.gov). Income values are inflation-adjusted and reported in 2010 dollars, using the California CPI from the California Department of Finance.

Sources of Personal Income

Data are provided by the Bureau of Economic Analysis (BEA). Data are from Personal Income by Major Source and Earnings by NAICS Industry (CA05N). Personal income has been adjusted into 2010 dollars using either the California CPI from the California Department of Finance or the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics, when the data are national.

Economic Base and Locally-Serving Industries: Moving Solano Forward

These data come from the Quarterly Census of Employment and Wages (QCEW) which allows for a look at employment, wages, and establishments data at the NAICS-4 digit level. The North American Industry Classification System (NAICS) allows for a drill down below the major industry sector. Wages have been adjusted into 2010 dollars using either the California CPI from the California Department of Finance or the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics, when the data are national.

County Revenue and Assessed Property Value

Data for sales tax revenue are from the State of California Board of Equalization and the Solano County Department of Finance. Data on the assessed value of residential properties is from the Solano County Assessor's office.

Community: Our Changing Community

Population Growth & Domestic and Foreign Migration

Data are from the E-6: Population Estimates and Components of Change by County - July 1, 2000-2013 report by the California Department of Finance and are for Solano County, the Bay Area otherwise (including Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara and counties), the North Bay (Napa and Sonoma counties) and California overall. Estimates for 2010 are provisional. Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad, and the balance of hundreds of thousands of people moving to and from California from within the United States.

For the population pyramids, the data used comes from the California Department of Finance, P-3 report (State and County Population Projections by Race/Ethnicity, Detailed Age, and Gender, 2010-2060 (by year)).

Dependency Ratios

Data for the dependency ratios, which are the percentage of the population that is either under 18 years of age or over 65 years of age, come from the 2005-2012 American Community Survey from the U.S. Census Bureau, including the decennial Census in 2010.

High School Dropout Rates

Data for the 2011/2012 academic year are provided by the California Department of Education Educational Demographics Office. The 4-year derived dropout rate is an estimate of the percent of students who would drop out in a four-year period based on data collected for a single year.

High School Graduation Rate and Percentage that Meet UC/CSU Entrance Requirements

Data for the 2008/2009 academic year are provided by the California Department of Education. There has been a recent change in methodology such that time periods before 2009 are not comparable to those after 2009. In theory, the methodology used calculates an approximate probability that one will graduate on time by looking at the number of 12th grade graduates and number of 12th, 11th, 10th and 9th grade dropouts over a four year period. The adjusted dropout numbers were used which accounts for students who dropout and re-enroll, and lost transfer students.

Health Insurance Coverage

Data for health insurance coverage comes from the Census Bureau's Small Area Health Insurance Estimates www.census.gov/did/www/sahie/

Residential Foreclosure Activity

Data was compiled by RAND California on behalf of DataQuick News. Data reflects total foreclosures for townhomes, condominiums and single family homes. The foreclosure numbers are strictly recorded Trustee's Deeds, or when the property is actually taken back by the bank. 2010 data includes foreclosures through June.

Trends in Home Sales

Data provided by RAND California Statistics and sourced by DataQuick News. For average sale price and number of transactions, all homes (including condos/townhomes) were included in calculations. Sales price are inflation-adjusted and reported in 2010 dollars, using the U.S. City Average Consumer Price Index (CPI) of all urban consumers, published by the U.S. Bureau of Labor Statistics.

2007 NAICS Industry Cluster Definitions

Advanced Food and Beverage Manufacturing

1112 Vegetable and Melon Farming
 1113 Fruit and Tree Nut Farming
 1114 Greenhouse, Nursery, and Floriculture Production
 1119 Other Crop Farming
 1121 Cattle Ranching and Farming
 1124 Sheep and Goat Farming
 1129 Other Animal Production
 1151 Support Activities for Crop Production
 1152 Support Activities for Animal Production
 3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing
 3116 Animal Slaughtering and Processing
 3118 Bakeries and Tortilla Manufacturing
 3121 Beverage Manufacturing

Construction

5413 Architectural, Engineering, and Related Services (Federal Government)
 2361 Residential Building Construction
 2362 Nonresidential Building Construction
 2371 Utility System Construction
 2373 Highway, Street, and Bridge Construction
 2381 Foundation, Structure, and Building Exterior Contractors
 2382 Building Equipment Contractors
 2383 Building Finishing Contractors
 2389 Other Specialty Trade Contractors
 541310 Architectural Services
 541320 Landscape Architectural Services
 541330 Engineering Services
 541350 Building Inspection Services
 541370 Surveying and Mapping (except Geophysical) Services

Health and Social Services

6222 Psychiatric and Substance Abuse Hospitals (State Government)
 6211 Offices of Physicians
 6212 Offices of Dentists
 6213 Offices of Other Health Practitioners
 6214 Outpatient Care Centers
 6216 Home Health Care Services
 6231 Nursing Care Facilities
 6232 Residential Mental Retardation, Mental Health and Substance Abuse Facilities
 6233 Community Care Facilities for the Elderly
 6239 Other Residential Care Facilities
 6241 Individual and Family Services
 6243 Vocational Rehabilitation Services
 6244 Child Day Care Services

Life Sciences (Pharmaceuticals, Medical Devices, Biotechnology)

3254 Pharmaceutical and Medicine Manufacturing
 3391 Medical Equipment and Supplies Manufacturing
 54171 Research and Development in the Physical, Engineering, and Life Sciences
 541380 Testing Laboratories
 811219 Other Electronic and Precision Equipment Repair and Maintenance

Professional and Environmental Services

3231 Printing and Related Support Activities
 5241 Insurance Carriers
 5242 Agencies, Brokerages, and Other Insurance, Related Activities
 5311 Lessors of Real Estate
 5312 Offices of Real Estate Agents and Brokers
 5313 Activities Related to Real Estate
 5411 Legal Services
 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
 5414 Specialized Design Services
 5415 Computer Systems Design and Related Services
 54172 Research and Development in the Social Sciences and Humanities
 5418 Advertising and Related Services
 5511 Management of Companies and Enterprises
 5611 Office Administrative Services
 5613 Employment Services
 5616 Investigation and Security Services
 5617 Services to Buildings and Dwellings
 5619 Other Support Services
 6115 Technical and Trade Schools
 541620 Environmental Consulting Services
 813312 Environment, Conservation, and Wildlife Organizations
 9241 Administration of Environmental Quality Programs (Federal Government)
 9241 Administration of Environmental Quality Programs (State Government)
 9241 Administration of Environmental Quality Programs (Local Government)

Specialized Manufacturing

2131 Support Activities for Mining
3252 Resin, Synthetic Rubber, and Artificial Synthetic Fibers and
Filaments Manufacturing
3256 Soap, Cleaning Compound, and Toilet Preparation
Manufacturing
3272 Glass and Glass Product Manufacturing
3273 Cement and Concrete Product Manufacturing
3323 Architectural and Structural Metals Manufacturing
3324 Boiler, Tank, and Shipping Container Manufacturing
3326 Spring and Wire Product Manufacturing
3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt
Manufacturing
3328 Coating, Engraving, Heat Treating, and Allied Activities
3329 Other Fabricated Metal Product Manufacturing
3331 Agriculture, Construction, and Mining Machinery
Manufacturing
3332 Industrial Machinery Manufacturing
3339 Other General Purpose Machinery Manufacturing
3371 Household and Institutional Furniture and
Kitchen Cabinet Manufacturing
3399 Other Miscellaneous Manufacturing
8113 Commercial and Industrial Machinery and Equipment
(except Automotive and Electronic) Repair and Maintenance

Trade and Logistics

4231 Motor Vehicle and Motor Vehicle Parts and Supplies
Merchant Wholesalers
4232 Furniture and Home Furnishing Merchant Wholesalers
4233 Lumber and Other Construction Materials Merchant
Wholesalers
4234 Professional and Commercial Equipment and Supplies
Merchant Wholesalers
4237 Hardware, and Plumbing and Heating Equipment and
Supplies Merchant Wholesalers
4238 Machinery, Equipment, and Supplies Merchant Wholesalers
4239 Misc. Durable Goods Merchant Wholesalers
4241 Paper and Paper Product Merchant Wholesalers
4243 Apparel, Piece Goods, and Notions Merchant Wholesalers
4244 Grocery /Related Product Merchant Wholesalers
4246 Chemical and Allied Products Merchant Wholesalers
4247 Petroleum and Petroleum Products Merchant Wholesalers
4251 Wholesale Electronic Markets and Agents and Brokers
4841 General Freight Trucking
4842 Specialized Freight Trucking
4883 Support Activities for Water Transportation
4884 Support Activities for Road Transportation
4889 Other Support Activities for Transportation
4921 Couriers
4931 Warehousing and Storage
424910 Farm Supplies Merchant Wholesalers
424990 Other Miscellaneous Nondurable Goods Merchant
Wholesalers

The 2013 Solano County Index of Economic and
Community Progress can be found at:

www.solanocounty.com/economicindex

Economic Forensics and Analytics

Robert Eyler, Ph.D., President

PO Box 750641, Petaluma, CA 94975

(707) 318-0348 ♦ eyler@econforensics.com

www.econforensics.com

County of Solano

Stephen Pierce, M.P.A., County Administrator's Office

675 Texas Street, Suite 6500, Fairfield, California 94533

(707) 784-6122 ♦ slpierce@solanocounty.com

www.solanocounty.com

Solano County Economic Development Corporation

Sandy Person, President

360 Campus Lane, Suite 102, Fairfield, California 94534

(707) 784-1855 ♦ sandy@solanoedc.org