



## **Solano County 2022**

# **Index of Economic and Community Progress**

**County of Solano and Solano Economic Development Corporation**

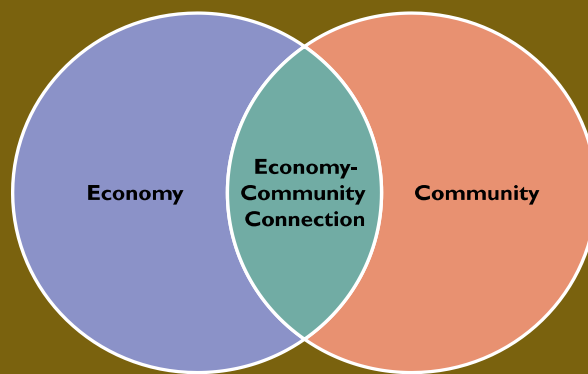
June 2023

# Solano County 2022

## 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 public and private sector leaders to expand Solano County's economy and support its long-term viability.

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, the Bay Area, California, and the United States. The 2012 to 2022 editions include the objective analysis of Dr. Robert Eyler from Economic Forensics and Analytics ([www.econforensics.com](http://www.econforensics.com)).

All of the annual index reports, as well as other, in-depth analyses, can be found at [www.solanocounty.com/economicindex](http://www.solanocounty.com/economicindex).



## Index of Economic and Community Progress

We are proud to be a part of the 15th annual Solano County Index of Economic and Community Progress.

Since the first edition, this report provides various economic and demographic indicators for Solano County, capturing trends and showing comparisons that describe our local economy. Links to recent economic and demographic changes, as well as macroeconomic forecasts and policies help inform our efforts as partners in regional economic development. Additional care has been taken in this edition to provide policy makers and the community a comprehensive data-based view of Solano County's economy to help support future decisions for the County. Geopolitical issues and inflation cloud the economic picture to 2025. With both opportunities and challenges, remaining objective in these studies is critical. Official data sources are utilized to support this analysis. We are proud to partner again with Dr. Robert Eyler, President of Economic Forensics and Analytics, as our research lead for this annual Index.

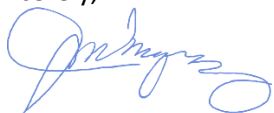
### **Solano County Jobs, Housing and Change: Moving Solano Forward**

Employers in Solano County hired 6,000 more workers in 2022. Our farmers had their best year in over a decade. Jobs recovery is almost complete now from the pandemic's shock on Solano County's employers and workers. Solano County's unemployment rate fell toward pre-pandemic levels to 4.2 percent as 2022 ended, one of the lowest unemployment rates in the County's history. We know that people have left Solano County; by comparison the exodus is less than the core Bay Area and our neighbors to the west (Napa, Marin and Sonoma counties). In 2022, the California Department of Finance estimated that Solano County lost 2,143 residents. Solano County housing prices remain regionally affordable and started to decrease slightly from peaks reached in summer 2022; as 2022 ended, the median home price in Solano County was estimated to be \$591,400. Solano County's schools graduated at a higher rate than ever before, as our students came back to physical classes. Countywide efforts for economic and workforce development move Solano County forward. This county needs to keep the strong partnership among employers, workforce and training thriving to be competitive through this decade and beyond. Solano EDC will be completing Moving Solano Forward 3 soon, funded by a grant from the United States Economic Development Administration, funding from the County of Solano and its seven cities (Benicia, Dixon, Fairfield, Rio Vista, Suisun City, Vacaville, and Vallejo) and the Solano Transportation Authority. We engaged a team of talented consultants from Newmark to build a playbook for future economic development efforts. Our goal is to build more prosperity for your regional businesses and citizens. Newmark, a consultant hired to develop the Solano EDC: Moving Solano Forward III report, identified over 60 strategies that we, as an ecosystem, can work on in order to build more prosperity for our businesses and residents, including, and not limited to why businesses should choose to locate in Solano County, deepen relationships with area universities and build cluster networks in target industry areas.

### **American Rescue Plan Act, Project Funding Update**

The American Rescue Plan Act of 2021 was a \$1.9 trillion economic stimulus bill passed by the 117th United States Congress, signed by President Biden, intended to speed up the country's recovery from the economic and health effects of the COVID-19 pandemic. The State of California received approximately \$27 billion in funding, then allocated to local jurisdictions, including \$91.5 million to Solano County schools, \$74.8 million to Solano County cities, and \$86.9 million to the County of Solano. In March 2023, after nearly two years of careful deliberation, the Board of Supervisors allocated the full amount to the County of Solano for more than 50 community projects. Projects are in the areas of public and behavioral health, workforce training, small business development, emergency food, children and youth services, affordable housing, water, broadband, and other infrastructure, parks improvements, and non-profits to support the unhoused population. Strategic utilization of local ARPA funds is a key strategy to moving Solano County past the pandemic and into recovery.

Sincerely,



John Vasquez  
Chairperson  
Solano County Board of Supervisors



Chris Rico  
President  
Solano Economic Development Corporation

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## Solano County Key Facts

### Area

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

2022 Population (January 1, 2023)	Population
Benicia	26,180
Dixon	19,018
Fairfield	119,526
Rio Vista	9,988
Suisun City	28,471
Vacaville	100,806
Vallejo	121,658
Unincorporated	18,102
<b>County Total</b>	<b>443,749</b>

Population Change: 2022 to 2023 (Jan 1) **-2,132**

Solano County 2030 Population Est. **475,232**  
(CalTrans estimate as of April 2023)

### Top 5 Employment Sectors (2022 year-end)

Healthcare and Social Assistance	26,700
All Government (incl. US Military)	23,500
Retail Trade	17,600
Leisure and Hospitality	15,700
Construction	12,300
Manufacturing	11,200

Total Industry Jobs (2022) **141,400**

Employment to Housing Units (2023) **85.7%**

Employment to Housing Units (2019) **90.7%**



### Educational Attainment (2017–21 Avg.), %

Less than high school	11.1%
High school graduate only	23.8%
Some college, no degree	26.8%
Associate's degree	10.4%
Bachelor's degree	18.9%
Graduate or Professional degree	9.0%

### Age Distribution of Pop (2017–21 Avg.), %

Under 5 years old	5.9%
5 to 19	18.6%
20 to 44	33.8%
45 to 64	25.8%
65 and older	15.9%

### Ethnic Composition of Pop (2017–21 Avg.), %

White	34.2%
Hispanic	28.6%
Asian	15.8%
African-American	12.3%
Other (incl. mixed race/Pacific Islander)	9.1%

Building Permits Issued, New Housing Units  
(Fiscal Year 2021–22) **1,673**

### Sources and Notes:

1. Population and housing data come from California Department of Finance ([www.dof.ca.gov](http://www.dof.ca.gov)), as of May 2023.
2. Employment data from California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov)), as of April 2023.
3. Employment to housing unit ratios help city and county development plan for efficient municipalities and transit networks. A ratio of 100 percent suggests a balance in housing units and commuting workers. Ratios below 100 percent suggest the local economy has more residents working outside (or fewer jobs locally) in net versus other areas; ratios above 100 suggest rising numbers of commuters coming to the local area from other areas to work.
4. Demographic data from the Census Bureau's American Community Survey ([factfinder.census.gov](http://factfinder.census.gov)), March 2023.
5. Building Permits data provided in March 2023 by the County of Solano, fiscal year 2021-22, ending June 30, 2022.

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## Key Highlights from the 2022 Index

### Our Changing Economy

- Solano County employers hired 6,000 more workers (farm and non-farm) in 2022, a 4.4 percent increase from 2021, to 141,400 payroll workers.
- Solano County's labor force increased by 1,600 in 2022, as county residents continued to go back to work, but the total is still 6,200 fewer than in 2019.
- 193,800 residents of Solano County were employed as 2022 ended, 8,000 more than in 2021.
- Solano County's unemployment rate was 4.2 percent for 2022 on average (unemployment was 5.2 percent on average in 2021).
- Industry job gains in 2022 were driven by leisure and hospitality, healthcare, construction, manufacturing, and teachers coming back.
- Based on the most recent data available, the inflation-adjusted (real) gross product in Solano County increased by 11.2 percent in 2021, surging ahead faster than the state and nation versus 2020.
- Solano County's personal income per capita increased again in 2021, rising by 4.5 percent after inflation versus the 2020 level.
- Median household income increased in 2021 versus 2020 to \$71,766 in 2012 dollars (+1.6%).
- Industry jobs focused on customers outside Solano County ("base" industries) increased in 2022 by approximately 2,617 jobs compared with 2021, an expansion of 685 base industry jobs versus 2019.
- Solano County median wages for local workers fell slightly in 2023 from 2022 by \$0.13, but remained above California's median wage.
- Poverty rates among Solano County residents fell in 2021 (the latest data), based on five-year averages, to approximately 8.9 percent of residents.
- Cost of living in Solano County was estimated to rise by 7.2 percent in 2021 (the latest data), faster than state and national averages and likely to continue rising based on national inflation data in 2022's data.
- Agricultural values for Solano County farmers increased in 2021 (the latest data), +14.1% versus 2020 to their highest levels since 2004, as Solano County farmers regained access to global markets.
- Social equity metrics for 2021 suggest Solano County's economy continued providing poverty alleviation and rising homeownership for its BIPOC communities, with mixed results for median household income after inflation adjustments.

### Our Changing Community

- Solano County's population fell by 2,132 in 2022 (-0.5 percent), due primarily to residents leaving for elsewhere in the United States.
- The population forecast for Solano County is 475,232 by 2030 as estimated in 2022; Solano County's population is forecasted to grow from 2022 to 2050 by 19.7 percent, or by approximately 87,243 more residents.
- In the 2021-2022 academic year, Solano County's high-school graduation rate increased from the previous academic year (AY) to 88.8 percent; Solano County's graduation rate remained higher the state average (which also increased) in AY 2021-22.
- In 2022, Solano County's median housing price increased 2.3 percent to \$578,610; housing affordability decreased in 2022.
- As of March 2023, housing prices were forecast to fall approximately 1.9 percent in Solano County through March 2024.
- 1,673 building permits were issued for new houses in fiscal year 2021-22, fewer than in fiscal year 2020-21, but still strong growth.
- Approximately 1.265 million square feet of commercial space was permitted during fiscal year 2021-22, less than fiscal year 2020-21.
- Estimated commuting time to work in 2021 (the latest data) did not change from the 2019 estimates for Solano County's residents, with almost double the residents working from home than before the pandemic.
- The total assessed property value in Solano County increased to over \$69.0 billion in fiscal year 2021-22, while taxable sales decreased slightly after inflation adjustments in calendar year 2022.

### Considerations for the Future

Solano County's labor markets showed strong recovery in 2022, but economic forecasts suggest slower jobs and income growth through 2025, some slight reductions in home values and continued migration of the regional population. While standard of living indicators reflected some socioeconomic progress, inflation since 2021 (inflation remains high alongside higher interest rates in 2023) will continue to have detrimental effects, especially on lower-income households.

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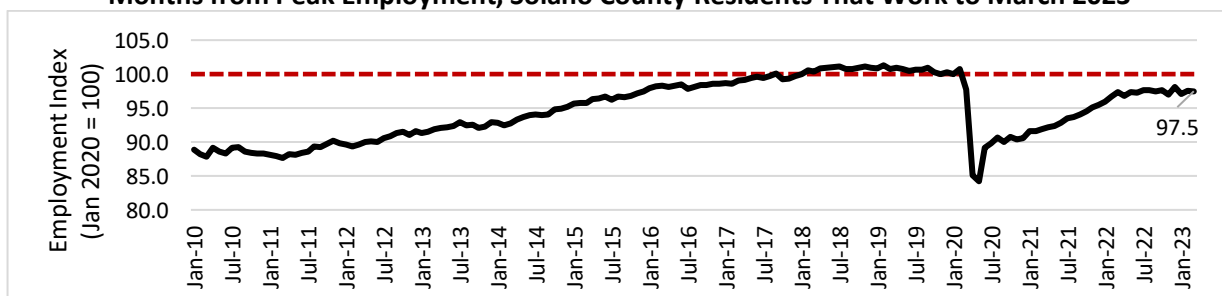
### Solano County Economy: Slower Growth, Continued Inflation

Inflation was a major focus of policy and politics nationally during 2022. As final social restrictions were lifted after the COVID-19 pandemic, subsequent increases in inflation also increased household economic concerns about the American economy's health. The Federal Reserve increased short-term interest rates used by banks to lend to each other, transmitting higher costs of borrowing. The policy focus was to reverse spending in the American economy to also reverse inflation pressure. Global uncertainty also increased in 2022 and remains in place based on continued conflicts in Ukraine and other parts of the world. While global supply-chain stability has returned, the conflicts cloud that stability's future. The American political scene has also become more concerning as we move closer to the 2024 Presidential election. American equity markets lost value from "bull-market" growth previous to 2022, directly affecting household wealth and the California state budget. A bright spot is the national labor market in terms of continuing to grow and hire more workers, a key reason a second recession has not been declared in the United States since the pandemic-induced recession in 2020 as of May 2023.

The economic forecast for California from the California Department of Finance (that accompanies the state budget) is similar to that of the United States overall through 2023 and toward 2025: (1) slower income growth due to lower productivity levels and lingering inflation; (2) continued labor market growth, but slower job growth after 2023; and (3) some reduction in housing values in 2023 to then return to slow-growing home values to 2025. In summary, forecasts for both the US and California economies in 2023 are for a slower growth year and perhaps a mild recession if global uncertainty and headwinds worsen.

As of March 2023, California's economy has lost 700 jobs since June 2022 parallel to continuous jobs growth nationally over the same time period. Jobs growth in Solano County has also stalled after seasonal adjustments starting in summer 2022 as 2022 ended. We use 2019 as a benchmark year (pre-pandemic) for most comparisons. A reduced labor force remains a regional problem; the pandemic's initial shock to reducing labor force was due to people moving away from the Bay Area and Solano County in net, primarily to other places around the United States. Migration patterns help explain why Solano County's labor force has yet to regain pre-pandemic levels. As of March 2023 (the latest labor-market estimates available as of April 2023), Solano County has seen jobs go back to 97.5 percent of 2019 employment levels; Solano County's labor force remains 1.1 percent below its pre-pandemic level. Housing prices are forecasted to fall in price during 2023, though housing prices rose sharply between April 2020 and August 2022. Jobs growth remains a focus of economic and workforce development in Solano County.

**Employment Levels, Index = 100 in January 2020, Seasonally Adjusted  
Months from Peak Employment, Solano County Residents That Work to March 2023**



Source: California EDD (<https://www.labormarketinfo.edd.ca.gov/data/employment-by-industry.html>) and EFA Calculations.

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## Index Overview

### Solano County Jobs Increased to 141,400 in 2022

The jobs recovery that started in 2021 continued in 2022 in terms of annual averages. Total jobs at Solano County's employers grew by 4.4 percent in 2022 from 2021; farm jobs increased by 100 jobs in 2022 from 2021. Specific industries leading that jobs growth included: healthcare; construction; professional and business services; and public education (teachers). Solano County's labor force, the sum of employed residents and those unemployed but actively looking for work, remained below 2019 levels for a third year in a row (6,200 fewer than 2019 but an increase of 1,600 in 2022 from 2021).

*In 2022, Solano County employment increased by 6,000 (4.4 percent) across all Solano County employers, with some (but not all) industries recovering jobs lost due to the pandemic shock in 2020.*

### The Broader Context: State and National Economic Updates

The US economy continued to see job growth in 2022, bucking many forecasts and economic theory in some ways; by December 2022, the US labor market had regained the total number of jobs lost due to

*Forecasts through 2025 suggest both 2023 and 2024 will be slower growth years, primarily due to labor and housing market downturns from higher interest rates.*

the pandemic-induced recession, 101.7

percent of the pre-pandemic peak for jobs.

Industry sectors have recovered to levels that suggest expansion beyond pre-pandemic levels in some industries (construction) and perhaps structural change (leisure and hospitality) in

others. In California, jobs growth began to flatten out in summer 2022, as higher interest rates and rising inflation began to take its toll on hiring across the state in contrast to the national economy.

### Housing Prices Began to Fall as 2022 Ended From Recent Peak Levels Early in 2022

Between March 2020 and December 2022, the median price of housing in Solano County increased 22.8 percent, according to Zillow™ Research. In December 2022 the median price of a single-family home was approximately \$578,610 in Solano County, compared with \$742,360 in California as a whole; the statewide, median home price was \$702,810 a year earlier. Housing price forecasts for Solano

County and the Bay Area are slightly pessimistic for 2023 and 2024; as of March 2023, Solano County home prices fell 5.9 percent since the peak in 2022 and were forecasted to fall another 1.9 percent by March 2024. Rental costs continued to rise in 2022, another sign of inflation pressures for lower- and middle-income workers. Data from Zillow™ Research suggest median rents in

*Zillow™ Research predicted Solano County home prices to fall by only 1.9 percent between March 2023 and March 2024 after rising by 22.8 percent from March 2020 to December 2022.*

Solano County by city range between \$2,158 in Vallejo and \$2,558 per month in Vacaville as of March 2023 (the latest data available at the time of this writing).



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Building permits in Solano County increased for the calendar year 2022 by 1,673 units in 2022 versus 2,157 units in 2021. Looking at city-level permits, Fairfield had more new units permitted than any

*Regional economic development faces challenges in keeping occupancy stable in commercial real estate, especially office and retail spaces.*

other city in Solano County, but Vacaville, Suisun City and Dixon were not far behind. New commercial square footage permitted changed by 1.265 million square feet in fiscal year 2021-22 compared with over 2.2 million square feet permitted in fiscal year 2020-21. The outlook for commercial space vacancy remains concerning outside industrial markets; Colliers International provided data that suggests office space in Solano County saw vacancy

rates increase slightly in 2022, from 20.1 percent in 2021 to 22.7 percent as 2022 ended. Office lease rates actually increased to \$2.57 per square foot (sq ft) in 2022 from \$2.48 in 2021 for Class A space. Class B space has relatively low vacancy at 6.2 percent as 2022 ended.

### Solano County: Continued Jobs Growth in 2022, Growth for 2023 Uncertain

Hiring remains a challenge for Solano County's employers due to a regional lack of labor force. In 2022, labor force increased by 1,600 workers, but is still 6,200 less than year-

**Comparison of Solano County Labor Force Components, 2019 to 2022  
Number of Workers and Percent Change Based on Annual Averages**

	Number of Workers			Change from 2021	
	2019	2021	2022	2019	2021
Labor Force	208,500	200,700	202,300	-6,200	+1,600
Employed Residents	200,600	185,800	193,800	-6,800	+8,000
Unemployment Residents	8,300	14,900	8,500	+200	-6,400
Industry Employment	143,400	135,400	141,400	-2,000	+6,000

Source: EDD (<http://www.labormarketinfo.edd.ca.gov>), Labor Market Information, Annual Averages; a new benchmark of 2020 was set with some revisions.

end 2019, our pre-pandemic benchmark for recovery. Employed residents of Solano County grew in 2021, an estimated 8,000 more residents working, but the total employed is still below the pre-pandemic level by 6,800 working residents. Economic and workforce development professionals need to monitor how these changes affect Solano County's employers and merchants. During 2022, jobs recovery and more hiring continued for almost all major industries in Solano County.

### Thinking about Targeted Industries: Moving Solano Forward, Phase III

A recent Economic Development Administration (EDA) grant provided to Solano Economic Development Corporation (Solano EDC) continued a project called Moving Solano Forward, now in Phase III. The initial work was to provide guidance about economic diversification for Solano County after the Great Recession (2008-10). Work was completed in early 2023 by Newmark, which concluded with recommending the following, updated targeted industries:

- Fruit and Vegetable Preserving and Specialty Food manufacturing;
- Support Activities for Crop Production;
- Pharmaceuticals and Medicine Manufacturing;
- Beverage Manufacturing; and
- Architectural and Structural Metals Manufacturing.

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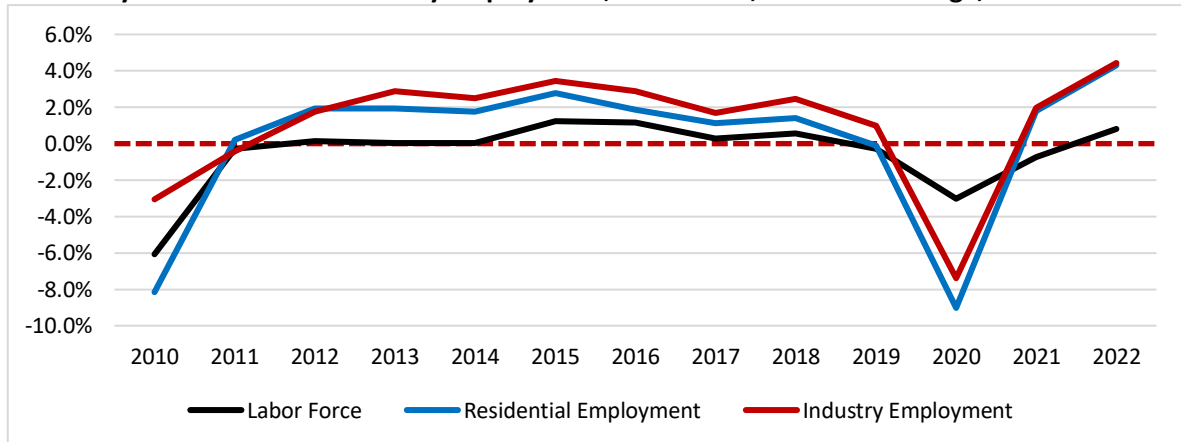
**Solano County Employment, Sorted by Changes in 2022**  
**2022 Annual Average Gains and (Losses) of Jobs since 2019, 2021, 2022**

Industry	2019	2021	2022	Change, 2019-22	Change, 2021-22
Restaurants	12,100	11,000	12,200	100	1,200
Health Care and Social Assistance	26,900	25,800	26,700	(200)	900
Construction	12,300	11,600	12,300	0	700
Professional and Business Services	10,200	10,400	10,900	700	500
Public Education	9,300	8,100	8,600	(700)	500
Administrative and Support Services	4,700	4,700	5,000	300	300
Manufacturing	11,100	10,900	11,200	100	300
Hotels	900	600	900	0	300
Other Services	4,700	4,200	4,500	(200)	300
Transportation, Warehousing, and Utilities	4,800	5,200	5,400	600	200
All Others	46,400	42,900	43,700	(2,700)	800
Totals	143,400	135,400	141,400	(2,000)	6,000

Source: EDD (<http://www.labormarketinfo.edd.ca.gov>), Labor Market Information, Annual Data, Chg. = Change.

Labor force participation rates increased in 2022 for Solano County but remain below 2019 levels. Population migration out of Solano County and the Bay Area generally in net suggests we should expect a reduction in available workers.

**Solano County Labor Force and Industry Employment, 2010–2022, Annual % Change, Number of Workers**



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

Gross product data for 2021 (the latest data available) showed an increase of income for Solano County after inflation. 2021 was the beginning of the recent inflation episode that still remains for the American economy in 2023 (the time of this writing). The increase in interest rates in 2022 slowed down inflation momentum, but political tensions throughout the world that affect supply chains remain an issue for inflation beyond continued strength in American labor markets overall. However, Solano County's increase in gross product in 2021 – derived primarily from “goods-producing” industries – shows efforts by Solano Economic Development Corporation (Solano EDC) based on Moving Solano Forward projects, are paying off.

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### Sector Shares of Gross Product at the County, State, and National Levels Percent of Total Gross Product in 2012 Dollars, 2010 to 2021, Selected Years

Year	Goods-Producing			Services-Producing			Public Sector		
	Solano County	CA	US	Solano County	CA	US	Solano County	CA	US
2010	28.4%	17.6%	19.0%	52.4%	69.4%	67.1%	19.2%	13.0%	13.9%
2019	38.8%	18.6%	19.1%	46.1%	70.8%	69.2%	15.1%	10.6%	11.7%
2020	40.4%	19.3%	19.2%	44.6%	70.0%	68.8%	15.0%	10.7%	12.0%
<b>2021</b>	<b>44.7%</b>	<b>18.2%</b>	<b>18.4%</b>	<b>42.2%</b>	<b>71.6%</b>	<b>70.2%</b>	<b>13.1%</b>	<b>10.2%</b>	<b>11.4%</b>

Source: Bureau of Economic Analysis (<http://www.bea.gov/regional/index.htm>); 2020 data are the latest available.

### Standards of Living Rising in Solano County in 2021, but Expect Inflation to Have Effects in 2022

Standard of living measures include income levels in real (inflation-adjusted) terms by household or per person (per capita). Examples include median household income, gross product per person and personal income per capita. In the 2021 data for these measures, continued job recovery, more federal stimulus payments, equity market gains, and other source of income rising all helped create an increase for all three standard of living measures we follow in this Index historically. Inflation had just begun to surge in 2021, and we should expect the 2022 data to be more mixed in terms of gains and losses in standards of living after inflation adjustments. The 2021 data for these measures are the latest data available.

In Solano County, real (2012 dollars) personal income per person was \$7,624 higher in 2021 than in 2019 (pre-pandemic benchmark). The gap between Solano County and the national average is less than \$1,000 as of 2021. Median household income (MHI), after being adjusted for inflation, grew in Solano County in 2021 by \$2,634 from 2019 levels, remaining above the state average by almost \$4,450 per household. In 2021, gross product per person increased by \$2,338 for Solano County from 2019 levels (+4.1 percent). From economic and social development perspectives, communities want all three measures to rise, and Solano County experienced that in 2021; Solano County should expect all three to slow their growth or fall in the 2022 data, due primarily to inflation rates at levels higher than expectations.

### Standard of Living Measures at the County, State, and National Levels 2019, 2020, and 2021 (latest available data), in 2012 Dollars (Inflation Adjusted)

Place	Gross Product per Person			Personal Income per Person			Median Household Income		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Solano County	\$56,983	\$57,899	\$59,321	\$45,359	\$50,693	\$52,983	\$69,132	\$70,636	\$71,766
California	\$69,010	\$67,525	\$73,264	\$58,231	\$62,391	\$65,292	\$63,840	\$65,657	\$67,322
United States	\$57,644	\$55,834	\$59,085	\$50,081	\$52,525	\$53,949	\$56,436	\$57,657	\$58,482

Sources: Bureau of Economic Analysis (<http://www.bea.gov>) and Census Bureau (<http://data.census.gov>); changes in benchmarking make these data different from previous Indexes for the same year and place.

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### Social Equity Metrics and the COVID-19 Recession

The 2022 edition of this Index continues providing social equity metrics. In 2021, poverty levels fell and homeownership increased for all communities, especially black, indigenous, and communities of color (BIPOC) versus renting a home in Solano County. Median household income (which is related to income derived from both wealth and work) increased for Hispanic households only, supporting the slight countywide gain in 2021 from 2020. While continued inflation rates at high levels are likely to reverse recent gains for all communities in 2022 and 2023, Solano County has provided comparably more social equity (opportunity for incomes to rise and homeownership by household for BIPOC households) since the pandemic as measured here compared to California or the United States on average.

### Community Indicators: Continued Gains and Some Challenges

Data from the California Department of Finance can be used to compare population estimates in California's counties to those in the annual census. In 2022, Solano County's population fell by an estimated 2,132 residents (as of May 2023). This reduction is a function of both an aging population and net departures of former residents from Solano County. Solano County's population was estimated at 443,749 residents as 2023 began. California also lost population; those unprecedented losses are now in their third year in a row.

### In academic year 2021-2022, Solano County's graduation rate was 88.8 percent.

Solano County's graduation rate increased to 88.8 percent of eligible students in academic year 2021-2022 (the latest academic year for which data are available, as measured by the California Department of Education, or CDE) from 85.8 percent in academic year 2020-21. California's average also increased, from 83.6 percent in academic year 2020-21 to 87.0 percent for the 2021-22 academic year. The effects of the pandemic on graduation rates have faded dramatically. In academic year 2021-22, 44.5 percent of Solano County graduates were UC/CSU-ready compared with 51.4 percent of graduates in the state of California on average. As predicted, during the last two academic years with a return to full, in-person instruction, both graduation rates and UC/CSU readiness of those graduates increased in Solano County for academic year 2021-22.

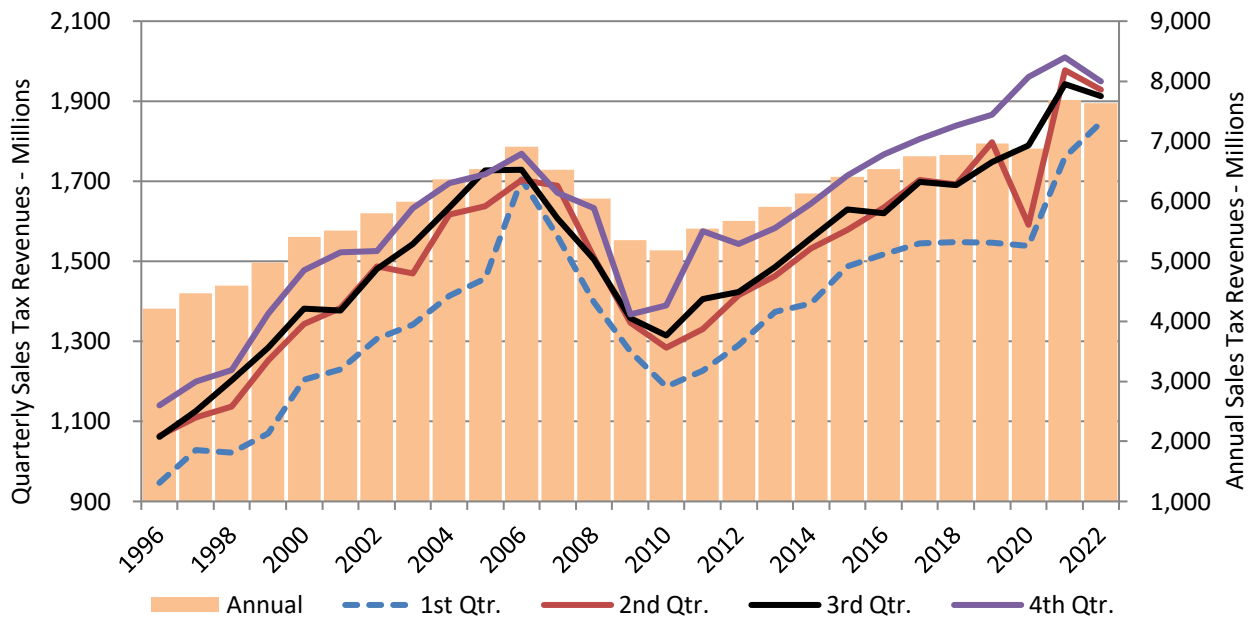
*Graduation rates were higher at Solano County high schools than in the state, on average, again in academic year 2021-2022 to a historically-high level and above the state average. The percentage of graduates in Solano County who were CSU-UC eligible also increased, but remained below the state average.*

### Taxable sales after inflation fell in 2022, due to mix of inflation and continued spending/tourism

Concerns over taxable sales as a result of the pandemic have lifted in Solano County. In calendar year 2022, Solano County experienced a small downturn based on inflation adjustments. Taxable sales in 2022 for Solano County in inflation-adjusted terms were \$7.64 billion, or 0.7 percent less than in calendar year 2021; however, this level of taxable sales is 9.7 percent more than 2019 taxable sales (pre-pandemic benchmark) after inflation. Higher interest rates likely affected overall taxable sales in 2022; inflation remained higher than expected also. The increase in brick-and-mortar retail sales since 2020 is a sign that patronage of Solano County's merchants, by both local residents and visitors to Solano County, increased as the pandemic's shadow has faded.

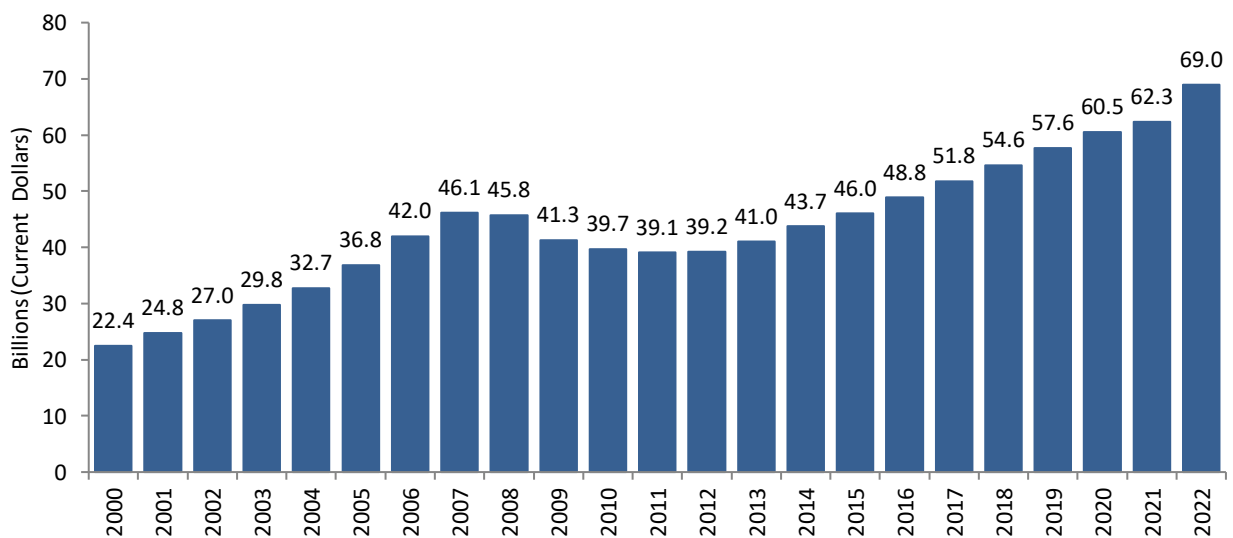
# Index of Economic and Community Progress

**Solano County Taxable Sales, Q1 1996 to Q4 2022**  
**Quarterly and Annual (2022 Q4 Latest Data), 2012 Dollars**



Housing values have retreated since recent highs in 2022, but aggregate, assessed property values in Solano County continued to grow in fiscal year 2021-22; the Solano County Assessor’s Office uses the current value to set the property tax roll each year. As of June 30, 2022, the assessed value of property in Solano County was approximately \$69.0 billion, the ninth year in a row of increases in the property tax roll. Avoiding a housing-market recession through 2025 is likely to help Solano County’s economy to recover more completely from the pandemic-induced recession in 2020.

**Assessed Value for Property Tax Purposes, Fiscal-Year End 2000 to 2022**  
**Current Dollars (Billions), Solano County**



Source: Solano County Assessor’s Office (current assessed value at fiscal-year end).

# Index of Economic and Community Progress

## Geographic Comparisons

Unless stated otherwise, the 2022 Index groups counties into the following three areas in California for the purpose of making comparisons as in recent Index editions. In some cases, individual counties in each of these areas are used instead and as appropriate.

- Bay Area Other: San Francisco, Santa Clara, Alameda, San Mateo, Contra Costa counties;
- North Bay: Sonoma, Marin, and Napa counties;
- Sacramento Metropolitan Statistical Area (MSA): Sacramento, Placer, El Dorado, and Yolo counties.

## Tailwinds, Headwinds, and Moving Solano Forward

To help the reader understand a policy or economic conclusion from each major data point discussed, the 2022 Index provides brief **“TAKEAWAY”** sections and one or two additional conclusions in most subsections. These comments are meant to help county policy makers, employers or residents consider opportunities or challenges regarding each topic.

In this 2022 Index, we use **“TAILWINDS”** when data suggest opportunities or positive news or ways in which workforce development, economic development, and Solano County’s cities can broaden partnerships to help its economy grow. We use **“HEADWINDS”** when the county economy might face some challenges, suggesting where resources or policy focus could help.

Also, throughout this index, **we will now shift to 2019 as the benchmark year** for comparisons, as the effects of the COVID-19 pandemic and social policies continue to affect Solano County’s economy and leave the Great Recession (our old benchmark was 2010) behind in terms of recent economic history. The background colors of this year’s index also reflect that Solano County’s farmers are still worried about drought, even with relatively high precipitation levels in winter 2022-23. The report starts with a look at Solano County’s economy followed by community indicators.



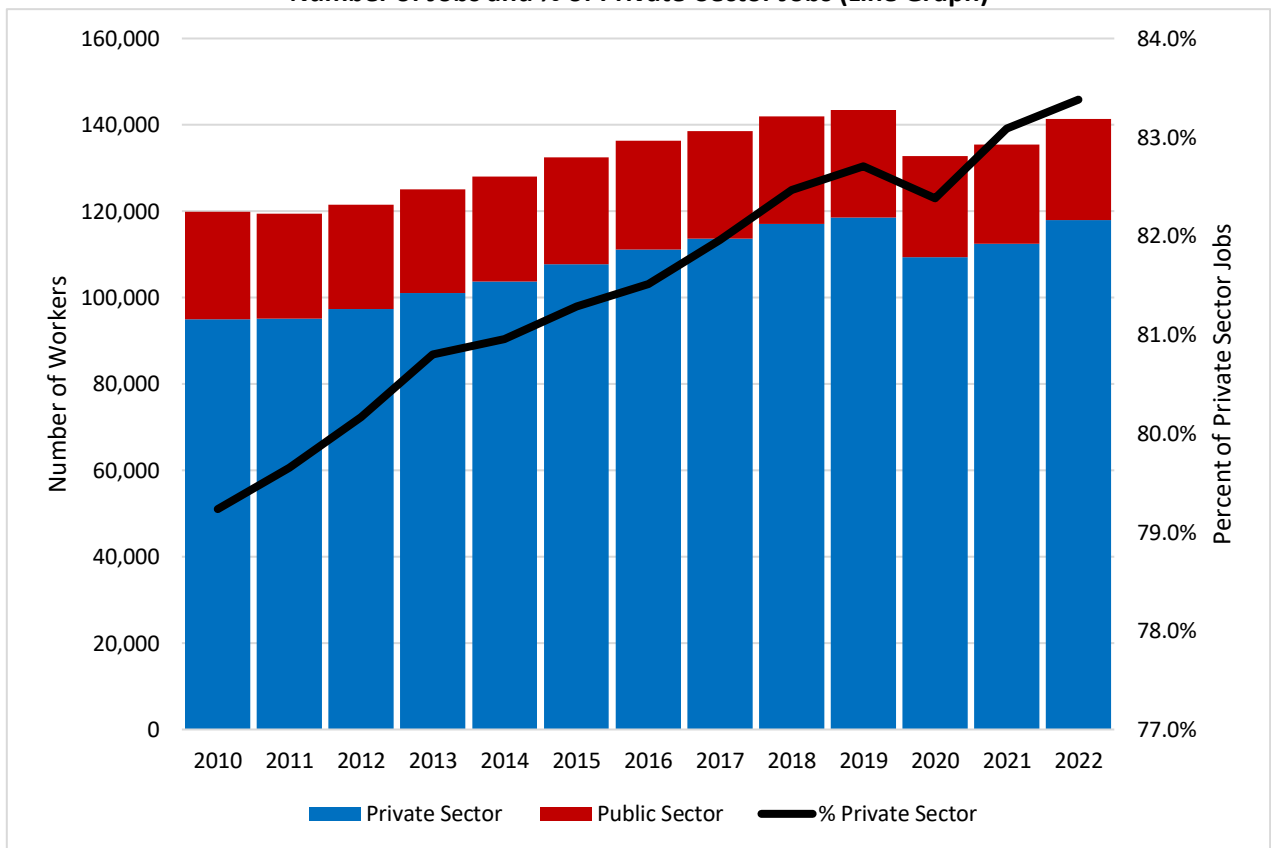
# Index of Economic and Community Progress

## Labor Markets

### Annual Local Industry Employment

Solano County employers increased payroll workers to 141,400 (+6,000 workers) as 2022 ended from 135,400 in 2021 (total revised in new data from April 2023). Private-sector employment increased by 5,400 workers (+4.8 percent growth and 83.3 percent of total) and government employment **increased** by approximately 600 workers. The gains to government workers in 2022 reversed recent losses in 2020 and 2021, but total government workers in Solano County are still 1,000 employees below the pre-pandemic benchmark employment levels as 2019 ended. Data on Travis Air Force Base, its economic impact and latest job levels are not officially updated since the 2021 edition of this index. Travis AFB employs approximately 1,500 military personnel and another 500 civilians.

**Solano County Private and Public Sector Employment, Annual Averages, 2010–2022**  
**Number of Jobs and % of Private-Sector Jobs (Line Graph)**



Source: California Employment Development Department (<https://www.labormarketinfo.edd.ca.gov/data/industries.html>).

**TAKEAWAY:** Solano County continued to see jobs recovery in calendar year 2022, with 6,000 new workers at Solano County’s employers.

**HEADWINDS:** While jobs growth in 2022 was very strong, monthly data on Solano County as well as national and state trends suggest 2023 is likely to be a year of slower jobs growth compared to 2022, perhaps slight jobs loss.



# Index of Economic and Community Progress

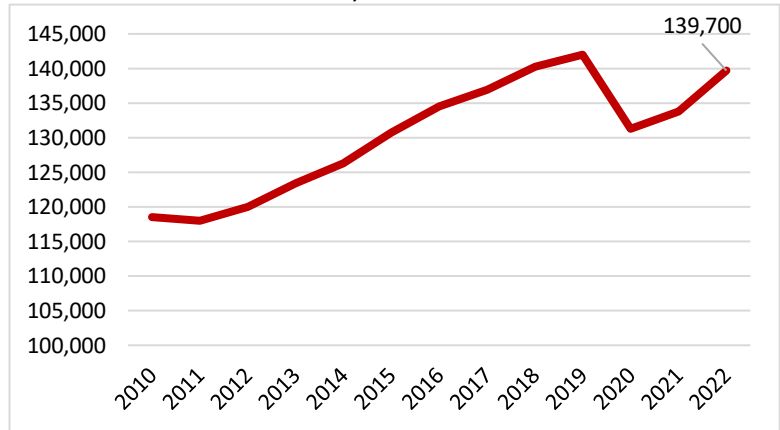
## Non-Farm Employment

Solano County’s labor markets recovered across all major industry sectors in 2022. Non-farm jobs in Solano County were estimated as 139,700 as 2022 ended. The graph below summarizes the industry-level percentage change in jobs compared to the 2019 benchmark jobs levels for selected months starting April 2020 through December 2022.

Agricultural (Farm) jobs growth in Solano County was slight in 2022

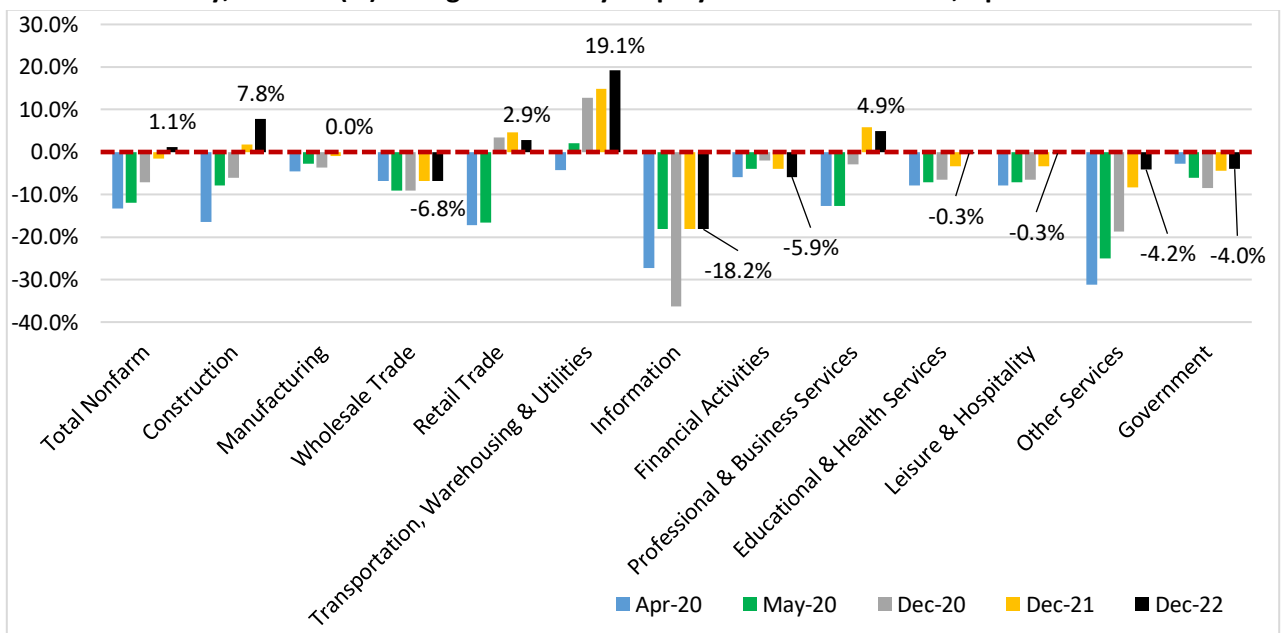
(+100 jobs). Solano County employers hired primarily workers in construction, healthcare, public education, and manufacturing in 2022. Industries such as leisure and hospitality, specifically in restaurants, led new job hires in Solano County, accounting for 20 percent of the growth in job during 2022 from hiring levels in 2021.

Solano County Non-Farm Employment, 2010–2022, Annual Data, Number of Workers



Source: California EDD ([www.edd.ca.gov](http://www.edd.ca.gov)), Annual Labor Market Data

Solano County, Percent (%) Change in Industry Employment from Jan 2020; April 2020 to Dec 2022



Source: California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov)), Monthly Labor Market Data

**TAKEAWAY:** Non-farm employment in Solano County grew by 5,900 jobs in 2022, regaining most of the jobs lost in 2020 that remained unfilled, but that change in 2022 still leaves Solano County 2,300 jobs lower than the number of workers as 2019 ended.

**TAILWINDS:** General industry jobs growth in 2022 supported continued recovery and some expansion in Solano County’s industries; such jobs growth helps the County’s economy sustain worker levels if slower economic years in 2023 and 2024 are coming as predicted in state and national labor markets.

# Index of Economic and Community Progress

## Employment Levels and Unemployment Rate Comparisons

This section looks at regional comparisons on labor force measures. Solano County’s unemployment rate measures county residents and how many workers are looking for work and not working (the unemployed) as a ratio of the unemployed and employed combined (labor force). Solano County’s unemployment rate was 4.2 percent on average in 2022, down from 7.4 percent on average for 2021. In December 2022, Solano County was 3.8 percent as predicted in the 2021 Index edition. Employment has returned regionally, but all regions used for comparison to Solano County in this study were still below pre-pandemic levels of residential employment (those that live within the county and have a job somewhere) as 2021 ended. The Sacramento metropolitan area (Sacramento MSA) experienced strong recovery in 2021 relative to other comparison regions.

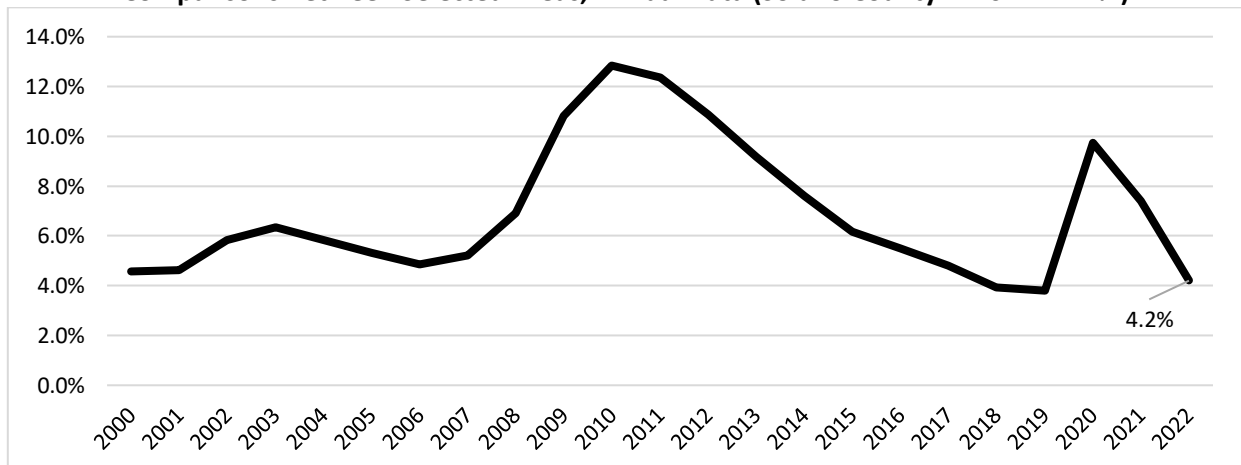
**Percent Change in Employed Residents, Comparisons for 2019, 2021 and 2022**

Employed Residents	2019-22	2019-21	2021-22
<b>Solano County</b>	-3.4%	-7.4%	4.3%
California	-1.0%	-5.5%	4.9%
Sacramento MSA	2.0%	-2.3%	4.4%
Bay Area Other	-1.7%	-6.8%	5.5%
North Bay	-4.4%	-8.6%	4.6%

Source: Source: California Employment Development Department (<http://www.edd.ca.gov>), Annual Labor Market Data

California ended 2022 at 4.2 percent unemployment also, down from 7.3 percent at the end of 2021. California’s unemployment rate remained relatively high due primarily to the Los Angeles metro area struggling to get back to pre-pandemic levels of employment. The United States overall had 3.6 percent unemployment as 2022 ended, down from 5.4 percent after 2021.

**Unemployment Rate (%), 2000–2022**  
**Comparisons Between Selected Areas, Annual Data (Solano County in 2022 = 4.2%)**



Source: California Employment Development Department (<http://www.edd.ca.gov>), Annual Labor Market Data

**TAKEAWAY:** Unemployment fell in 2022 for Solano County, as did unemployment for California on average; Solano County’s residents continued to find work regionally in 2022.

**HEADWINDS:** Wages pressures and an economic slowdown is likely to increase unemployment rates in 2023 and 2024 for Solano County and California on average.

# Index of Economic and Community Progress

## Special Section: Housing and Commuting, Regional Changes

Counties and cities throughout California are completing housing “elements”, especially in the Bay Area. Housing is economic development infrastructure; the mix of housing, its location and how it matches expectation of local employees and employers can affect how industries and specific business make location decisions. Housing mix and types can also affect local school funding directly and indirectly.

The regional housing needs allocation (RHNA) for 2023-31 was provided in detail for the 2021 Index edition for Solano County from regionwide (Bay Area) planning for housing, employment and transportation needs.

Housing stock, utilization and “burden” are concerns of housing advocates that worry about housing inequities for lower-income households. Below we compare recent data on housing ownership and the proportion of single-family (assumed owned or for sale) versus renting. Housing burden is primarily an issue with rental housing; the number of occupied housing units that have their housing cost at a level that is least 30 percent of their monthly income is considered burdened.

Regional Housing Needs Allocation (RHNA) Years 2023 to 2031, Solano County Summary Total New Net Housing Units and Percent “Affordable”		
Jurisdiction	TOTAL	% for households under 80% of AMI
<b>SOLANO COUNTY</b>		
Benicia	806	39.7%
Dixon	347	41.5%
Fairfield	3,047	40.2%
Rio Vista	473	42.3%
Suisun City	611	40.3%
Vacaville	1,862	41.1%
Vallejo	2,938	38.8%
Unincorporated Solano	908	41.2%
<b>Solano County</b>	<b>10,992</b>	<b>40.2%</b>

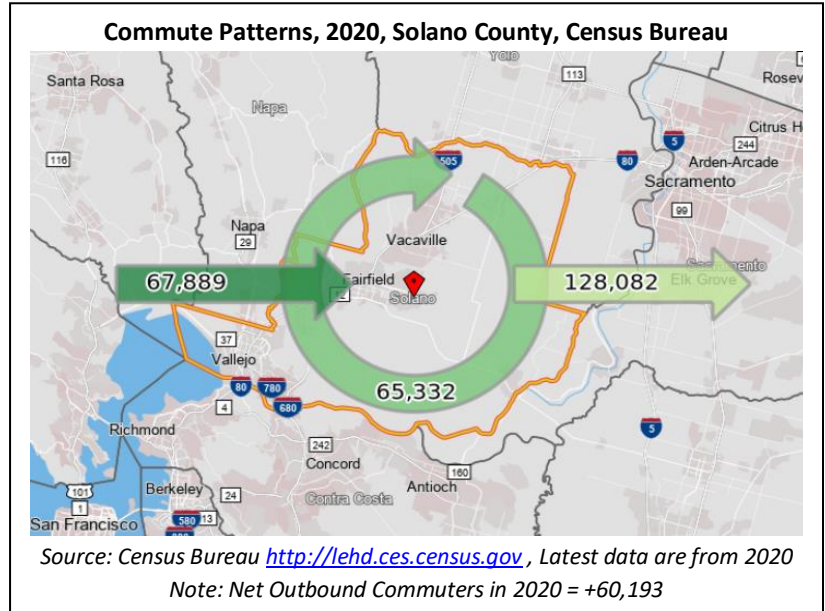
*Source: [Metropolitan Transportation Commission \(MTC\)](#)  
These are final numbers as of March 2022*

Housing Stock and Housing Mix (2010 and 2023)				Housing Tenure (2021)	
2010 Single Family Homes	2023 Single Family Homes	2010 Multi-Family Homes	2023 Multi-Family Homes	Owner 2010/2021	Renter 2010/2021
109,059 (71.4%) CA = 58.2%	118,995 (72.1%) CA = 57.2%	43,639 (28.6%) CA = 41.8%	46,048 (27.9%) CA = 41.8%	Solano County 65.7%/62.5%	Solano County 34.3/37.5%
				California 57.4%/55.4%	California 42.6%/44.6%

The pandemic shifted where we work generally and how we commute and travel for business. Pre-pandemic commute patterns remain in place, however, in many ways throughout Solano County.

# Index of Economic and Community Progress

Data on commuting among the cities and counties in and around Solano County are only available through calendar year 2020 as of March 2023 (the time of this writing). The map shows approximately 60,200 more workers in 2020 – versus 62,960 more workers in 2019) – commuted outside Solano County for work than came to Solano County for a job in 2020, suggesting the pandemic created a reduction in outbound commuters from Solano County to other areas for work.



The work-from-home data are available as estimates through the end of 2021 as of April 2023. Working from home almost doubled in the Census data through 2021 for Solano County versus the pre-pandemic benchmark of data from 2015-19. The average time to work, for those who left home for work, remained virtually unchanged in the latest data from the 2015-19 benchmark. However, for 2022 and 2023, these five-year averages may reveal more people working from home in Solano County, though changes are likely to be small.

### Time to Get to Work, Solano County Residents that Commute and Work from Home: 2019 and 2021, Count (People) and % Share of Annual Total

Time to Work (minutes)	2015-19 Average		2017-21 Average	
	Count	Share	Count	Share
<b>Work from Home</b>	<b>9,033</b>	<b>4.4%</b>	<b>17,223</b>	<b>8.2%</b>
Less than 10 minutes	21,370	10.4%	21,241	10.1%
10 to 14 minutes	27,251	13.3%	25,875	12.3%
15 to 19 minutes	27,447	13.4%	26,261	12.5%
20 to 24 minutes	19,213	9.4%	20,082	9.6%
25 to 29 minutes	8,430	4.1%	8,496	4.0%
30 to 34 minutes	21,762	10.6%	23,172	11.0%
35 to 44 minutes	13,332	6.5%	12,358	5.9%
45 to 59 minutes	19,605	9.6%	18,924	9.0%
60 or more minutes	37,642	18.3%	36,495	17.4%
Mean travel time to work (minutes)	<b>33.2</b>		<b>33.2</b>	

Source: American Community Survey, Census Bureau (<http://data.census.gov>), 5-Year Estimates, 2021 the latest data

**TAKEAWAY:** Travel times to work and overall commuting volumes have predictably fallen from pre-pandemic patterns. For California, the statewide average is 11.4 percent of total jobs are work from home, 9.7 percent for the United States in the five-year average from 2017-21.

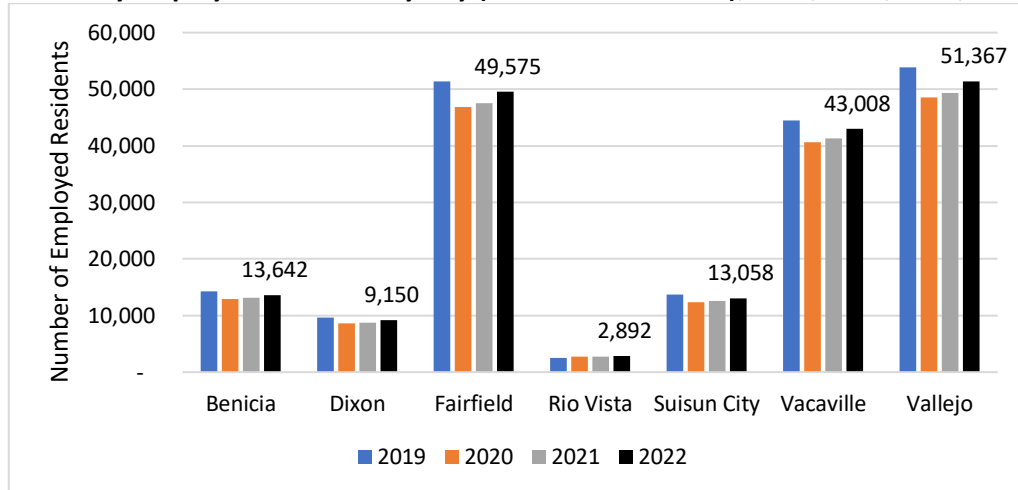
**TAILWINDS:** Commute patterns and the availability of single-family housing in Solano County means work-from-home incentives in Solano County should be competitive in the Bay Area, especially compared urban areas and those living in multi-family units. Economic development efforts may be able to link local residents to growing industries in Solano County for those that qualify for such jobs and also want to avoid continued commutes.

# Index of Economic and Community Progress

## Cities Overview: Labor Markets

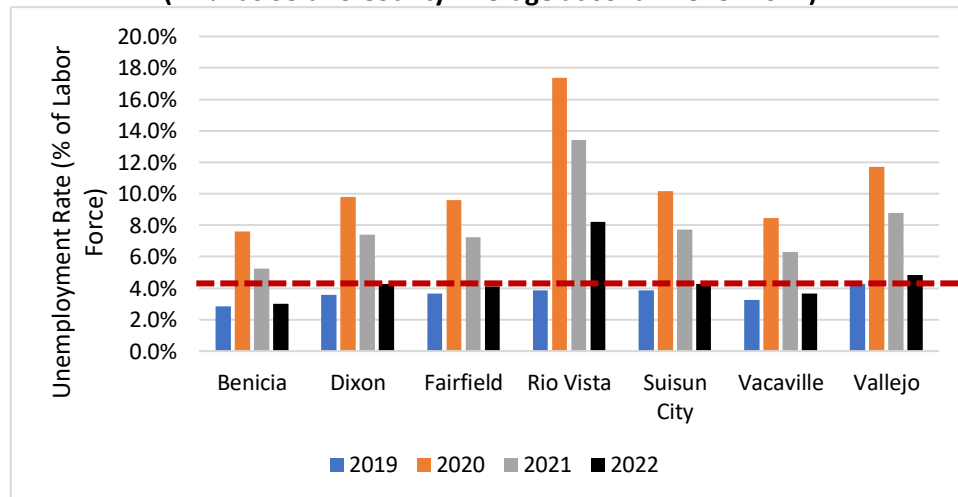
Like other parts of California, Solano County’s seven cities lost jobs in 2020 and began to recover in 2021; all cities showed continued jobs recovery in 2022. City unemployment rates recovered more quickly toward pre-pandemic rates than employment levels did due to smaller labor forces throughout these seven cities. Solano County’s unemployment rate had an annual average of 4.2 percent in 2022.

**Solano County Employed Residents by City (Number of Workers); 2019, 2020, 2021, and 2022**



Source: California EDD ([www.edd.ca.gov](http://www.edd.ca.gov)), Data for All Sub-County Areas

**Solano County Unemployment Rate (% of Labor Force) by City, 2019, 2020, 2021, 2022 (4.2% as Solano County Average at solid line for 2022)**



Source: California EDD ([www.edd.ca.gov](http://www.edd.ca.gov)), Data for All Sub-County Areas

**TAKEAWAY:** Jobs growth in 2022 took place in all seven of Solano County’s cities; Vallejo residents saw new jobs for 2,070 residents in 2022, the largest volume of change for any of Solano County’s cities.

**TAILWINDS:** Efforts such as Moving Solano Forward Phase III and city-level efforts in Fairfield, Suisun City, Vallejo, and Vacaville are all providing more support to local industries and workforce development to keep jobs-growth momentum going and prepare for the future.

## Index of Economic and Community Progress

### Employment in Base Industries and Locally-Serving Industries

Through three planning efforts known as “Moving Solano Forward”, economic development efforts have been to attract and expand “base” industries. Such industries create jobs that serve markets outside Solano County or serve visitors to Solano County. Such industries have larger “multiplier” effects or economic impacts than jobs that serve local residents only. As of Quarter 2 2022 (the latest official data available as of March 2023), Solano County jobs growth increased by 2,617 jobs since Quarter 2 2021.

The pandemic’s effects were primarily on services jobs, Some of those effects continued in 2022. As of Quarter 2 2022, for base industries, growth of 678 jobs since Quarter 2 2019 (pre-pandemic) showed how such jobs had recovered and now expanded in Solano County. However, locally-serving industries were still 4,217 jobs fewer than Quarter 2 2019; unassigned services jobs were 1,395 fewer than Quarter 2 2019 as of Quarter 2 2022, primarily services jobs also.

**Solano County Base versus Locally-Serving Industry Employment, Number of Workers, Second Quarter (Q2) Data, 2019, 2020, 2021, and 2022**

	2019 Q2	2020 Q2	2021 Q2	2022 Q2	Change 2019-22	% Chg. 2019-22
<b>Base Industries Totals</b>	<b>36,804</b>	<b>31,872</b>	<b>34,865</b>	<b>37,482</b>	<b>678</b>	<b>1.8%</b>
Agriculture	1,572	1,495	1,739	1,791	219	13.9%
Mining	524	385	332	337	-187	-35.7%
Wholesale Trade	4,212	3,903	3,905	4,036	-176	-4.2%
Information	237	218	209	273	36	15.2%
Finance and Insurance	1,070	1,043	939	874	-196	-18.3%
Real Estate, Rental and Leasing	316	280	303	361	45	14.2%
Prof., Sci, Technical Services	283	304	286	265	-18	-6.4%
Management/Consulting	763	702	662	709	-54	-7.1%
Arts, Entertainment and Rec	2,822	689	1,647	2,350	-472	-16.7%
Hotels, Bars and Restaurants	886	481	552	715	-171	-19.3%
Federal government	3,579	3,626	3,637	3,494	-85	-2.4%
State government	5,982	5,781	5,278	5,295	-687	-11.5%
Manufacturing	9,559	8,947	10,200	11,203	1,644	17.2%
Retail Trade	2,070	969	1,547	1,265	-805	-38.9%
Transport and Warehousing	2,929	3,049	3,629	4,514	1,585	54.1%
<b>Locally-Serving Ind Totals</b>	<b>89,397</b>	<b>78,634</b>	<b>82,982</b>	<b>85,180</b>	<b>-4,217</b>	<b>-4.7%</b>
Utilities	593	582	618	642	49	8.3%
Construction	12,679	10,165	11,392	12,161	-518	-4.1%
Information	1,170	823	843	885	-285	-24.4%
Finance and Insurance	3,417	3,338	3,148	3,005	-412	-12.1%
Real Estate, Rental and Leasing	1,728	1,517	1,650	1,750	22	1.3%
Prof, Sci, Technical Services	3,863	3,336	4,168	4,484	621	16.1%
Admin/Waste Manage Services	5,387	4,841	5,273	5,699	312	5.8%
Educational Services	2,034	1,789	1,808	1,896	-138	-6.8%
Healthcare/Social Assistance	25,914	24,341	24,434	25,446	-468	-1.8%
Arts, Entertainment and Rec	1,431	465	807	1,361	-70	-4.9%
Bars and Restaurants	496	240	290	456	-40	-8.1%
Other Services	4,475	3,285	3,922	4,254	-221	-4.9%
Local Government	15,847	14,382	14,136	14,783	-1,064	-6.7%
Local Portion of Retail Trade	10,045	9,287	10,207	7,994	-2,051	-20.4%
Local Trans and Warehouse	318	243	286	364	46	14.5%
Jobs in industries unassigned	17,965	15,011	14,380	16,570	-1,395	-7.8%

Sources: Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)) and its Quarterly Census of Wages and Employment (QCEW), Calculations by Author, Latest Data Quarter 2 2022 as of March 2023 (“Unassigned” jobs in industries that serve a mix of local and export markets).

**TAKEAWAY:** The pandemic’s effects of lowering jobs in Solano County remain unrecovered in many industries, but Solano County has done well in supporting and expanding base-industry jobs. Such jobs are a prime focus of economic development efforts everywhere.

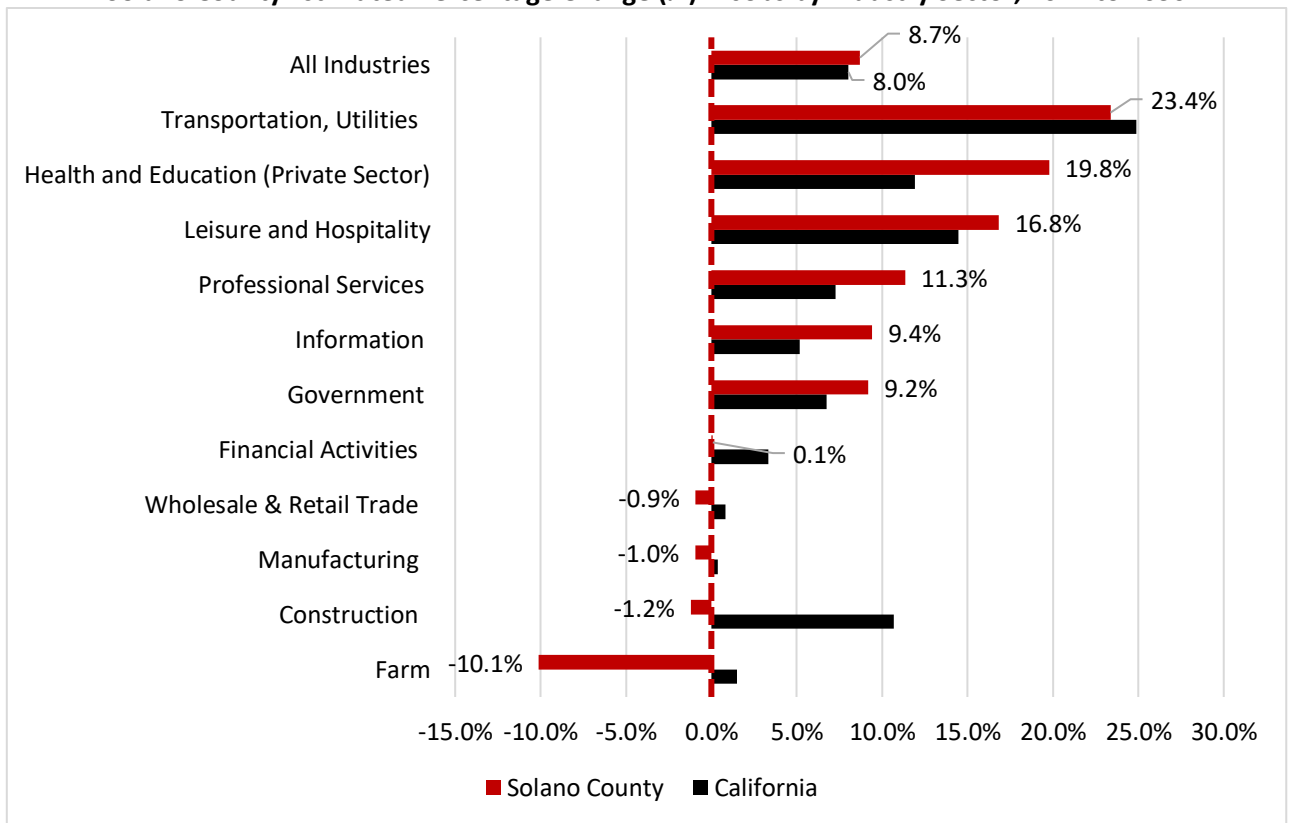
**HEADWINDS:** Predictions of an economic slowdown likely affect base-industry jobs first and then locally-serving jobs, especially if construction, tourism and manufacturing slow down to 2025.

# Index of Economic and Community Progress

## Long-Term Jobs Forecast: 2022 to 2030

These estimates from California Department of Transportation (CalTrans) help CalTrans plan for future infrastructure projects and support regional housing needs allocation (RHNA) estimates. Data below show the current forecast from 2022 (actual) to 2030 (forecasted) as optimistic for many industries in Solano County and California overall. However, jobs in retail, wholesale, manufacturing, construction, and agriculture are forecasted to fall in Solano County. For California, slight growth to the end of this decade is predicted across all industries (at a minimum; transportation and utilities, healthcare and private education and leisure and hospitality jobs lead growth in Solano County. Overall, this forecast suggests Solano County sees jobs growth at a faster pace than California to 2030 (8.7 percent versus 8.0 percent for California).

**Solano County Estimated Percentage Change (%) in Jobs by Industry Sector, 2022 to 2030**



Sources: California EDD ([www.edd.ca.gov](http://www.edd.ca.gov)) and California Dept. of Transportation ([CalTrans](http://CalTrans))

**TAKEAWAY:** These forecasts suggest Solano County has faster jobs growth than the state economy for leisure and hospitality positions through 2030, indicating a rise in the importance of tourism in Solano County’s economy. Health and private education jobs should be rising also versus other industries.

**TAILWIND:** The projected downturn in farm and wholesale/retail trade jobs creates workforce retooling and upskilling opportunities for workers displaced in these industries to transition to other, targeted industries with projected jobs growth.

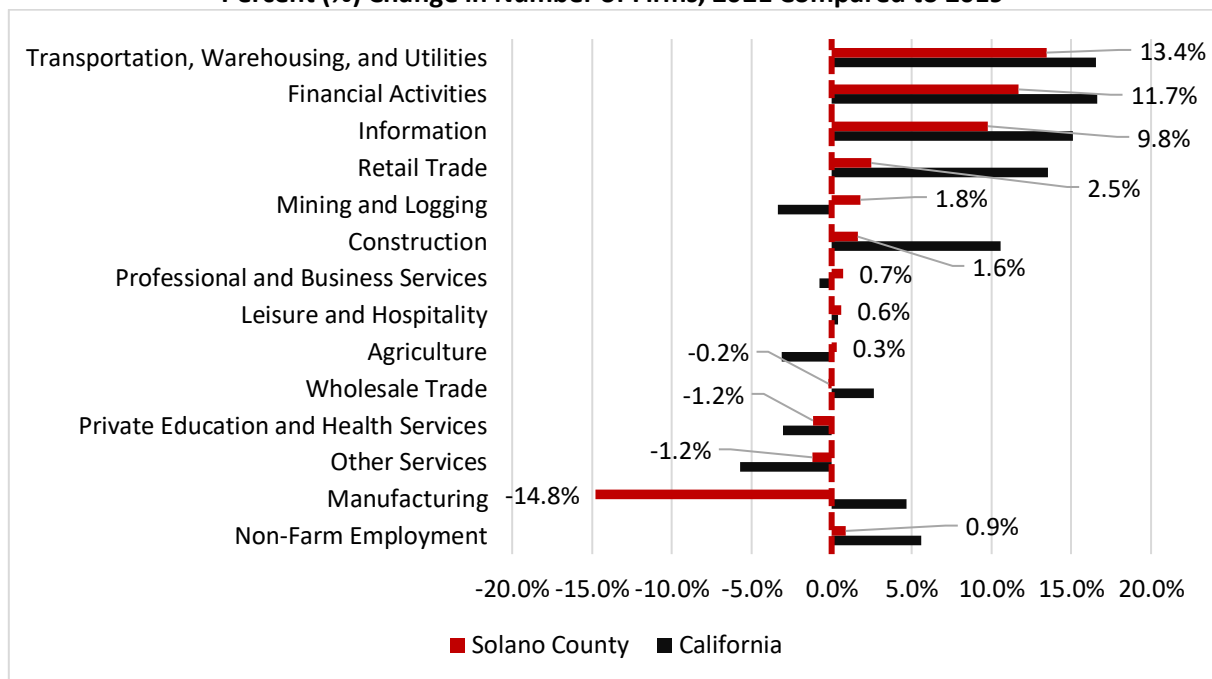
# Index of Economic and Community Progress

## Businesses and Incomes

### Non-Employer Businesses

In previous Index editions, we have used Census Bureau data on self-employed businesses to add information about Solano County's labor market. Due to the pandemic, the Census Bureau remains years behind on data about self-employed workers; 2019 data are the latest available as of April 2023. We used Bureau of Economic Analysis (BEA) and California EDD (EDD) data in the 2021 Index edition to show changes in estimated, self-employed workers by major industry sector from 2019 to 2020 and now provide an update to 2021 as compare to the pre-pandemic benchmark levels. By comparing payroll employment to total employment, the difference is considered to be self-employed workers. Between 2019 and 2021, approximately 1,800 more workers became self-employed in Solano County, but not all industry sectors saw more self-employed businesses.

**Solano County Self-Employed Businesses, Estimated**  
**Percent (%) Change in Number of Firms, 2021 Compared to 2019**



Source: Bureau of Economic Analysis (BEA) (<http://www.bea.gov>) and California EDD (2020 is the latest total employment data from BEA)

**TAKEAWAY:** Transportation, finance, software and technology (information) and retail businesses for self-employed workers grew more than other self-employed businesses between 2019 and 2021 for Solano County.

**TAILWINDS:** Becoming self-employed grew in Solano County less quickly than the state overall, but shows that Solano County is a place where anyone can start a business or provide services for another company while maintaining an ability to contract with multiple clients. Providing economic development and workforce development/entrepreneurial support is critical to maintaining this environment for new, self-employed businesses and workers.

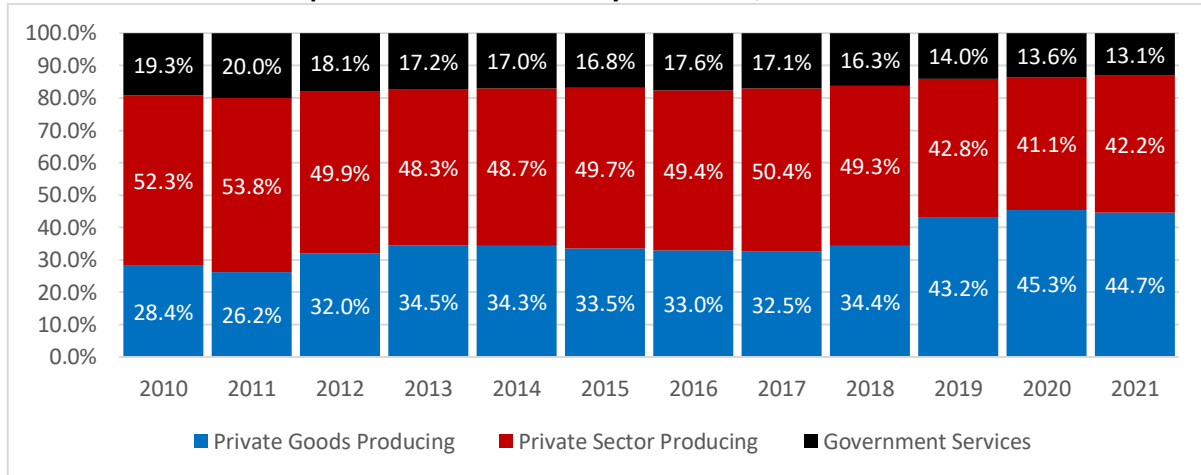


# Index of Economic and Community Progress

## Gross Product Change by Industry Sector and Overall Growth Rate

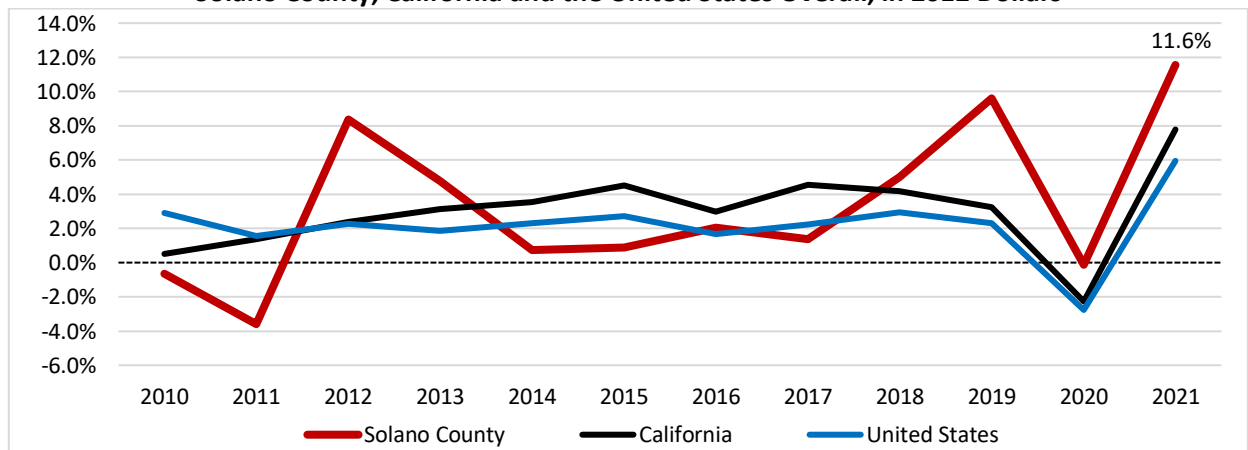
For gross product, how regional business add value to raw materials and create value from producing goods and services, annual growth after inflation adjustments surged in 2021 versus 2020. The national and state economies also experienced rapid gross product growth in 2021 as the economy reopened after the social choices concerning the pandemic in 2020. We should expect slower growth in 2022 and 2023 due to continued high inflation and high interest rates.

**Gross Product Share (%) by Major Industry Sector, 2010-21**  
**Proportions in Solano County Over Time, in 2012 Dollars**



Source: Bureau of Economic Analysis ([www.bea.gov](http://www.bea.gov))

**Gross Product Growth Annually, 2010–2021, Percent (%) Growth**  
**Solano County, California and the United States Overall, in 2012 Dollars**



Source: Bureau of Economic Analysis ([www.bea.gov](http://www.bea.gov))

**TAKEAWAY:** Private-sector businesses have been growing in importance and helped drive recent growth patterns in Solano County, suggesting the power of “traded” industries that focus on markets outside Solano County generated revenues and gains for Solano County employees.

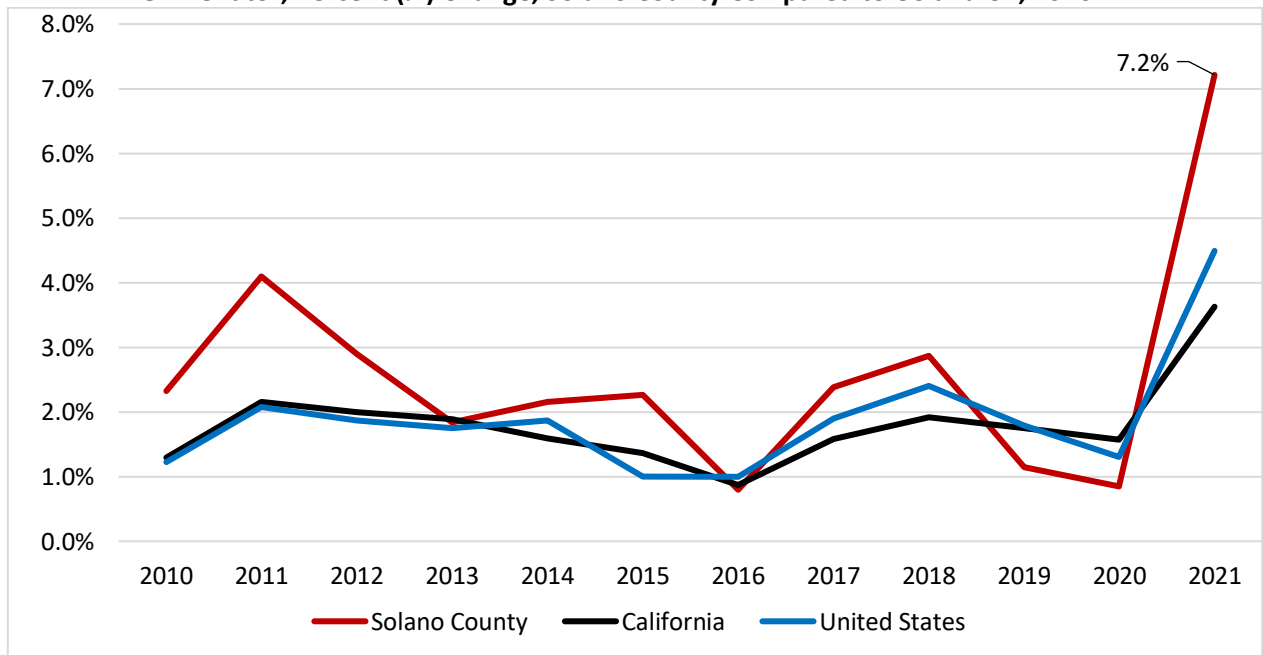
**TAILWINDS:** Growth of gross product is a reflection of how the local economy utilizes supply chains and workers locally to generate goods and services. Solano County, due to economic development efforts over the 2010s, is now seeing private-sector business grow in importance versus the public (government) sector. This shift is a major objective of the Moving Solano Forward planning phases and tasks.

## Index of Economic and Community Progress

### Gross Product Deflator and Solano County's Local Cost of Living

Inflation became a problem for the national economy in 2021, as low interest rates and large volumes of government transfers came to homes across the country due to social choices from the pandemic. The Gross Product Deflator (GP Deflator) calculated annually by the Bureau of Economic Analysis ([www.bea.gov](http://www.bea.gov)) is the ratio of nominal to real (inflation-adjusted) gross product. This is a proxy for local price indices, like the Consumer Price Index or CPI, which are not estimated at the local (county) level all but San Francisco and Los Angeles counties. We can see the quick movements for Solano County, California and the United States in 2021 versus most of the time from 2002 to 2021 on an annual basis. National and state data, as well as recent forecasts by the [California Department of Finance](https://dof.ca.gov/forecasting/Economics/economic-forecasts-u-s-and-california/)

GP Deflator, Percent (%) Change, Solano County Compared to US and CA, 2010-21



Source: Bureau of Economic Analysis, Regional Data (<http://www.bea.gov/regional>)  
 California Department of Finance tracks a CPI analog for California not available at the county level  
 (see <https://dof.ca.gov/forecasting/Economics/economic-forecasts-u-s-and-california/>)

**TAKEAWAY:** The sharp increase in gross product in 2021 showed how Solano County emerged from the pandemic strongly, but is now likely overshadowed by inflation pressure (percentage change in prices, estimated here using the gross product deflator data) created that may reverse these gains in the 2022 and 2023 data somewhat.

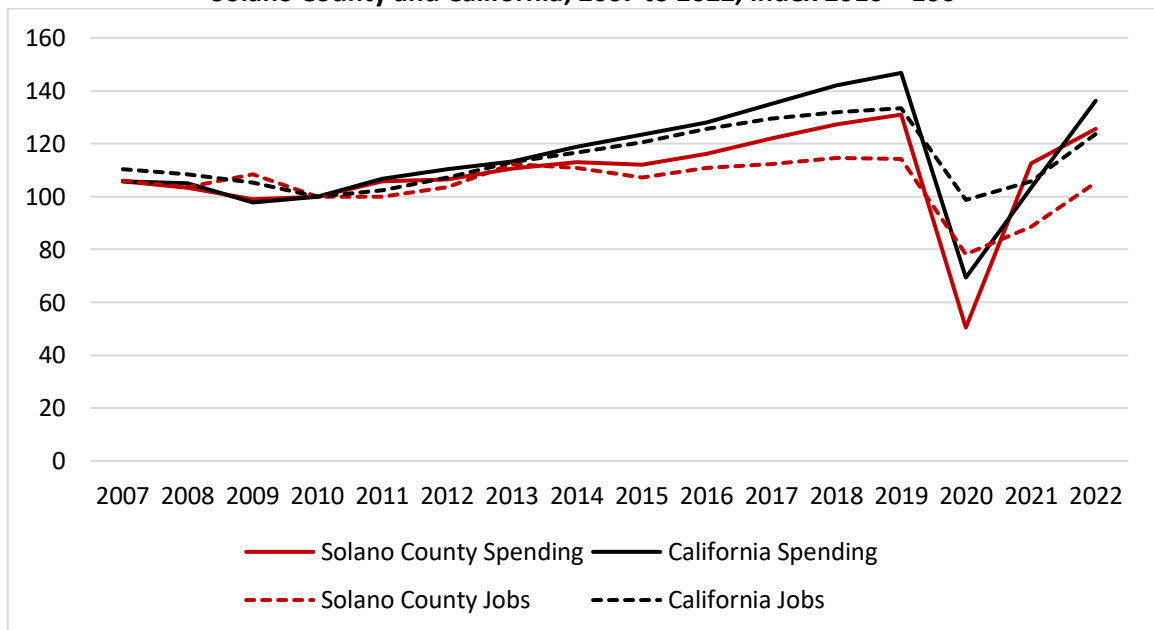
**HEADWINDS:** Expectations of relatively-high inflation levels to 2025 are coming from recent national- and state-level data and forecasts. When inflation is relatively high, it acts like a regressive tax on Solano County's lower-income households and small businesses.

# Index of Economic and Community Progress

## Tourism Industry: Supporting Visitors

Visitor-supporting industries in Solano County saw both spending and jobs rise in calendar-year 2022, as did spending and jobs throughout California. For Solano County, tourism spending and jobs fell sharply in 2020 due to the pandemic, but continue a recovery that has yet to rise beyond pre-pandemic peak levels of visitor spending and jobs, but should recover per-pandemic levels (2019) by 2023. Forecasts for the state of California suggest spending will rise to recover overall spending lost from the pandemic by 2024 in Solano County. According to Dean Runyan Associates, Solano County had approximately 8,640 jobs serving visitors, or approximately 6.1 percent of total employment in Solano County in 2022.

**Tourism Spending and Jobs, Visitor-Support Industries  
Solano County and California, 2007 to 2022, Index 2010 = 100**



Source: Dean Runyan Associates (<http://www.deanrunyanassociates.com>),  
2022 Report Available at <https://industry.visitcalifornia.com/research/economic-impact>

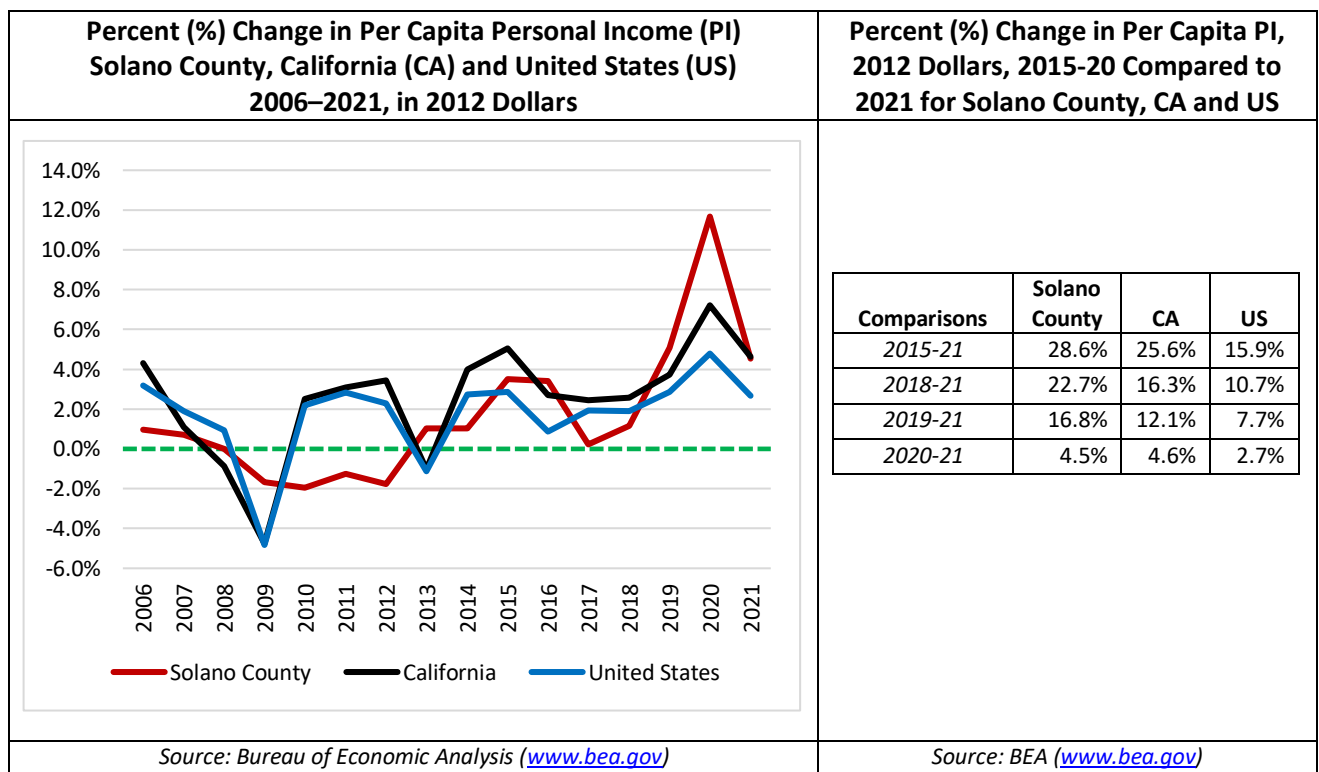
**TAKEAWAY:** Tourism to Solano County continues to grow since the pandemic shock, spending which brings more taxable sales and overnight stays to all seven cities and their budgets from incomes made outside Solano County.

**TAILWINDS:** Visitors support industries such as brick-and-mortar retail, local restaurants and events centers. The statewide forecasts suggest a growing market for visitors to California is going to continue through 2027 (see the latest forecast as of April 2023 [here](#)), regardless of a predicted economic downturn.

# Index of Economic and Community Progress

## Personal Income

Solano County’s personal income per person increased by 4.5 percent in 2021 (the latest data available) compared to 2020 after inflation adjustments, which is historically strong growth. The national and California economies experienced slower, per-capita income growth after the sharp increase in 2020. Smaller transfer payments from the federal government and rising inflation both had effects on personal income growth in 2021. A re-opened economy and job gains increased wage and salary income in 2021 in contrast. Personal income estimates in Solano County are the sum of wages and salaries, social transfer payments from all levels of government, investment income (dividends, interest, and rents), income from owning a business (proprietor’s income), and other income sources for Solano County’s residents.



**TAKEAWAY:** Personal income continued to recover in 2021, further helping Solano County’s households recover from the employment shock of the pandemic and to regain wage and salary income as Solano County’s residents went back to work.

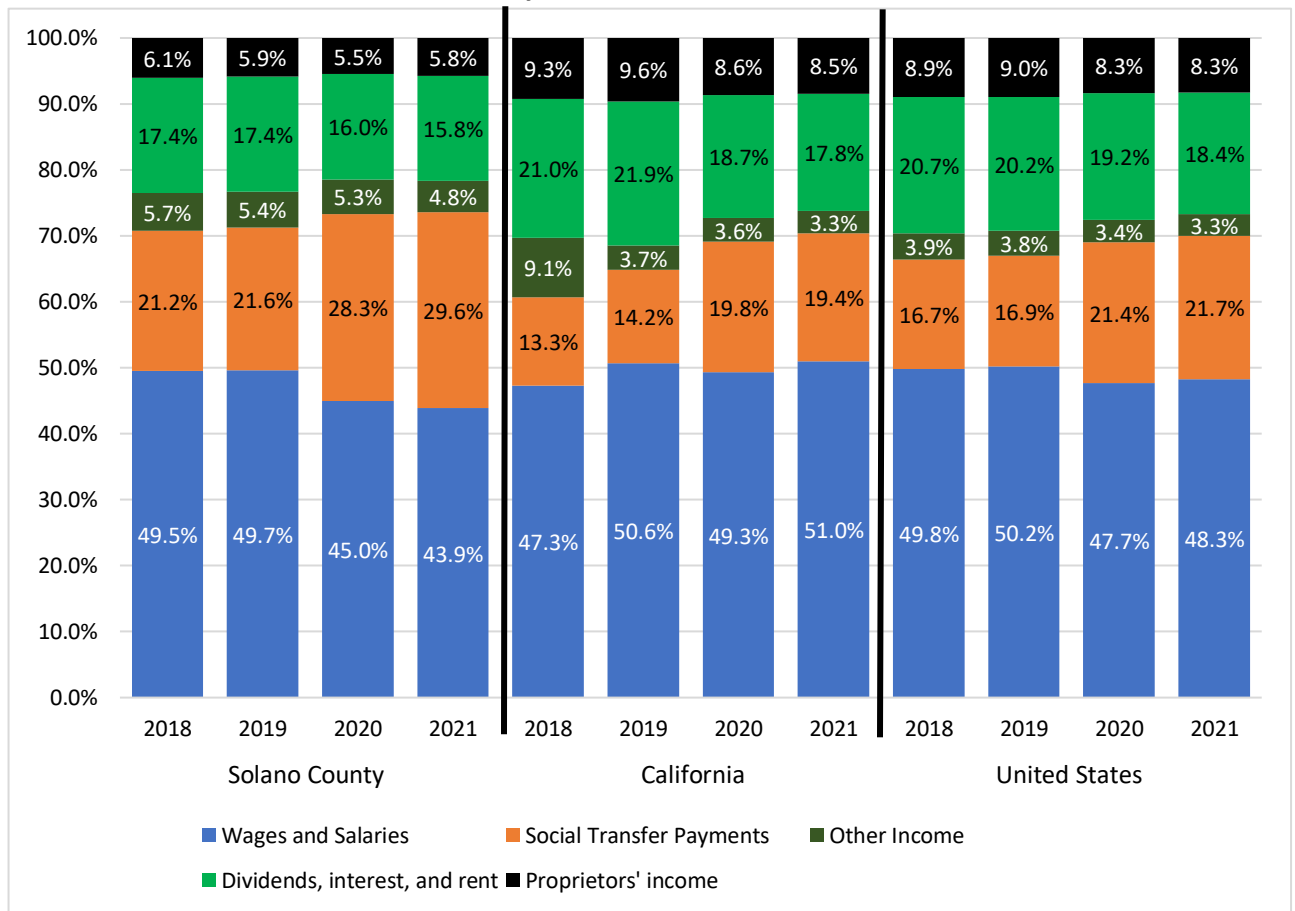
**HEADWINDS:** Throughout the state of California, a slower job market, equity market reversals and inflation are all likely to reduce per-capita personal income after inflation in the 2022 and 2023 data. Solano County should follow the state on average in terms of slower personal income growth.

# Index of Economic and Community Progress

## Sources of Personal Income

The figure shows California and the United States had slight shifts in the proportions of investment income (dividends, interest) and wages/salaries in 2020 (the latest data available). Governmental social transfer payments were 24.2 percent of Solano County’s total in 2020; transfer payments, including social assistance from county government, slowed down in 2021 throughout the United States.

**Sources of Personal Income (Percent (%) of Total), 2018 to 2021, in 2012 Dollars, Selected Years  
Solano County, California and the United States**



Source: Bureau of Economic Analysis ([www.bea.gov](http://www.bea.gov))

**TAKEAWAY:** In 2021, the re-opening of the national economy, with California and Solano County lagging a bit behind some states and more rural parts of California, reduced the proportion of incomes from government.

**TAILWIND:** Recent financial support from all levels of government, including the County of Solano, may continue to provide some workers an ability to consider more education, training or career change for Solano County’s residents through 2025. Such workforce development support can help local industries looking for workers at a time where labor force numbers are lower than expected.

## Index of Economic and Community Progress

### Business Affordability: Wages

An outcome of economic recovery from recession is rising wages. Previous versions of this Index show Solano County's wages are now larger than California's averages for most occupations. Occupational wage data for jobs in Solano County shown here compare wages to other regional economies and California overall. Solano County's median wage of \$24.10 in 2023 was a slight decrease from 2022's median wage of \$24.23. Many of the major occupational categories remained above the state median wage level.

**Solano County 2023 Wages by Occupational Categories, Wage Data in 2023 Dollars and Percent (%) of Median Wages (\$/hour) in California, Selected Areas also compared**

<i>Occupational Categories</i>	<i>CA</i>	<i>Solano County % of CA</i>	<i>Solano County</i>	<i>Napa County</i>	<i>Sonoma County</i>	<i>Sacramento MSA</i>	<i>San Jose MSA</i>	<i>San Francisco MSA</i>
<b>Total all occupations</b>	<b>\$23.91</b>	<b>100.8%</b>	<b>\$24.10</b>	<b>\$23.20</b>	<b>\$23.48</b>	<b>\$24.31</b>	<b>\$36.89</b>	<b>\$ 31.50</b>
Management Services	\$62.66	91.2%	\$57.16	\$57.69	\$56.75	\$57.83	\$86.28	\$ 79.25
Business and Financial Operations	\$38.87	98.6%	\$38.33	\$38.56	\$38.68	\$37.75	\$51.25	\$ 47.58
Computer and Mathematical	\$61.87	74.5%	\$46.11	\$46.89	\$47.88	\$49.69	\$82.57	\$ 68.77
Architecture and Engineering	\$49.82	98.3%	\$48.95	\$45.63	\$49.39	\$52.58	\$64.70	\$ 58.53
Life, Physical, and Social Science	\$42.46	100.3%	\$42.57	\$35.82	\$39.27	\$43.40	\$49.80	\$ 53.88
Community and Social Services	\$28.01	104.6%	\$29.30	\$30.58	\$26.80	\$28.83	\$34.93	\$ 29.42
Legal Services	\$60.87	62.6%	\$38.11	\$50.04	\$46.90	\$62.19	\$87.50	\$ 72.23
Education, Training, and Library	\$30.34	100.4%	\$30.46	\$31.40	\$29.79	\$29.03	\$36.07	\$ 34.57
Arts, Design, Entertainment, Sports, Media	\$36.93	71.8%	\$26.53	\$30.16	\$27.49	\$29.32	\$41.48	\$ 45.00
Healthcare Practitioners and Technical	\$50.82	114.4%	\$58.12	\$51.35	\$52.83	\$56.32	\$63.34	\$ 61.71
Healthcare Support Services	\$16.13	106.0%	\$17.09	\$17.50	\$17.15	\$14.99	\$16.89	\$ 16.52
Protective Services	\$22.52	188.8%	\$42.51	\$22.20	\$23.35	\$29.11	\$22.59	\$ 23.56
Food Preparation and Serving-Related	\$16.64	101.1%	\$16.82	\$17.22	\$17.08	\$16.59	\$18.22	\$ 18.08
Building and Grounds Maintenance	\$18.01	101.0%	\$18.19	\$19.10	\$18.56	\$17.97	\$20.62	\$ 21.09
Personal Care and Services	\$16.81	99.5%	\$16.72	\$17.29	\$17.52	\$16.60	\$18.54	\$ 18.49
Sales and Related Services	\$18.41	95.5%	\$17.58	\$20.29	\$18.65	\$17.61	\$26.76	\$ 22.99
Office and Administrative Support	\$22.83	103.2%	\$23.57	\$23.62	\$23.31	\$23.02	\$27.35	\$ 27.04
Farming, Fishing, and Forestry	\$16.12	105.5%	\$17.01	\$18.26	\$18.09	\$16.73	\$19.93	\$ 21.11
Construction and Extraction	\$29.76	102.0%	\$30.37	\$30.04	\$30.73	\$29.76	\$36.05	\$ 36.07
Installation, Maintenance, and Repair	\$28.47	107.2%	\$30.51	\$28.53	\$28.89	\$28.48	\$33.35	\$ 31.34
Production Jobs	\$20.34	110.3%	\$22.43	\$22.66	\$21.75	\$20.33	\$22.95	\$ 23.68
Transportation and Material Moving Services	\$19.27	98.0%	\$18.89	\$19.53	\$19.93	\$18.99	\$21.26	\$ 22.13

Source: Bureau of Labor Statistics ([www.bls.gov/oes](http://www.bls.gov/oes)), as of May 2023

Wages in GREEN are for occupations where Solano County median wages are greater than California wages.

**TAKEAWAY:** Solano County's median wages before inflation adjustments decreased slightly as 2023 began, likely due to slowing demand for workers since summer 2022 and thus more competition over fewer jobs for workers. Wages have increased since the pandemic, as has Solano County's cost of living.

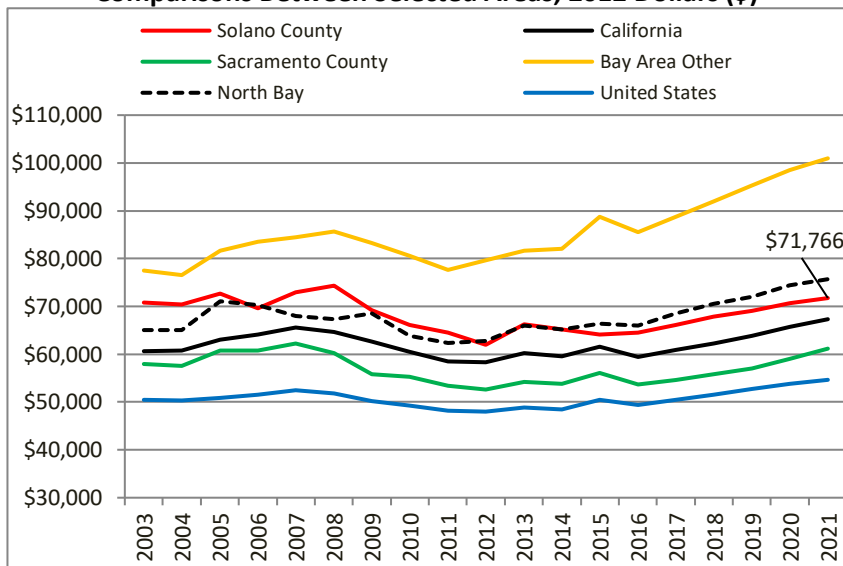
**HEADWIND:** While rising wages are a good thing for workers, small businesses may find rising wages another cost of doing business increasing amidst general inflation pressures along supply chains for businesses from construction to hair salons.

# Index of Economic and Community Progress

## Median Household Income (MHI) Comparisons

For Solano County, inflation-adjusted, median household income (MHI) increased in 2021 (the latest data), as did comparison areas, from 2020 levels. All comparison regions had rising, inflation-adjusted MHI levels despite inflation rising in 2021. The median “household” here represents support for four people in one housing unit. We should expect a reversal of these gains for all comparison areas in the 2022 data due to even larger inflation rates through the 2022 calendar year.

**Median Household Income 2003–2021, Comparisons Between Selected Areas, 2012 Dollars (\$)**

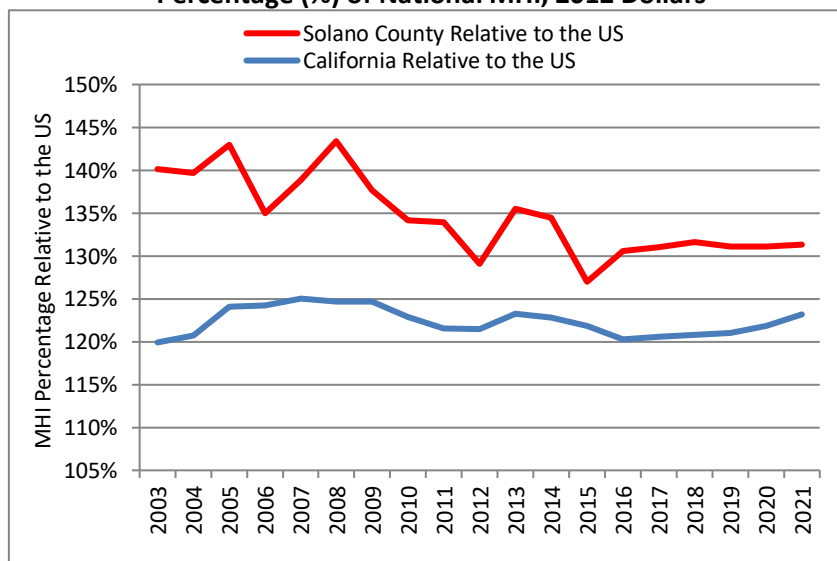


Sources: Census Bureau (<http://data.census.gov>), California Department of Finance ([CPI data](#))

**TAKEAWAY:** In 2021, Solano County’s MHI in 2012 dollars was \$71,766, slightly higher than 2020’s level of \$70,636.

**HEADWIND:** Rising median household income likely reflects rising regional wages in 2021 beyond inflation, where rising housing and rental prices (which contribute greatly to local costs of living) are likely to pressure MHI lower in 2022 after local inflation is considered.

**Median Household Income (MHI) 2003–2021, Solano County and California, Percentage (%) of National MHI, 2012 Dollars**



Sources: Census Bureau (<http://data.census.gov>), California Department of Finance ([CPI data](#))

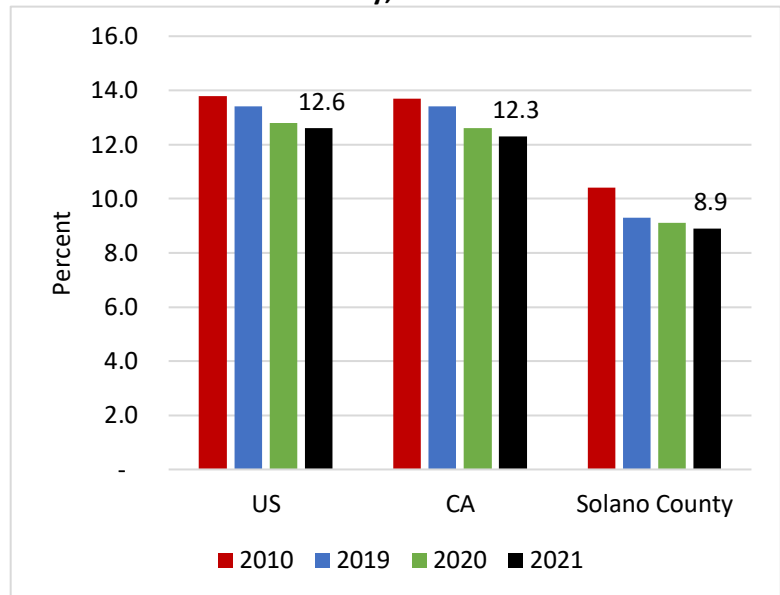
# Index of Economic and Community Progress

## Poverty Rates

The American Community Survey (ACS) of the Census Bureau tracks poverty rates, the percent of local residents with annual incomes below the federal poverty line (for a family of four, the federal poverty level was an annual income of \$26,500 or less in 2021, the latest comparison data available from Census Bureau).

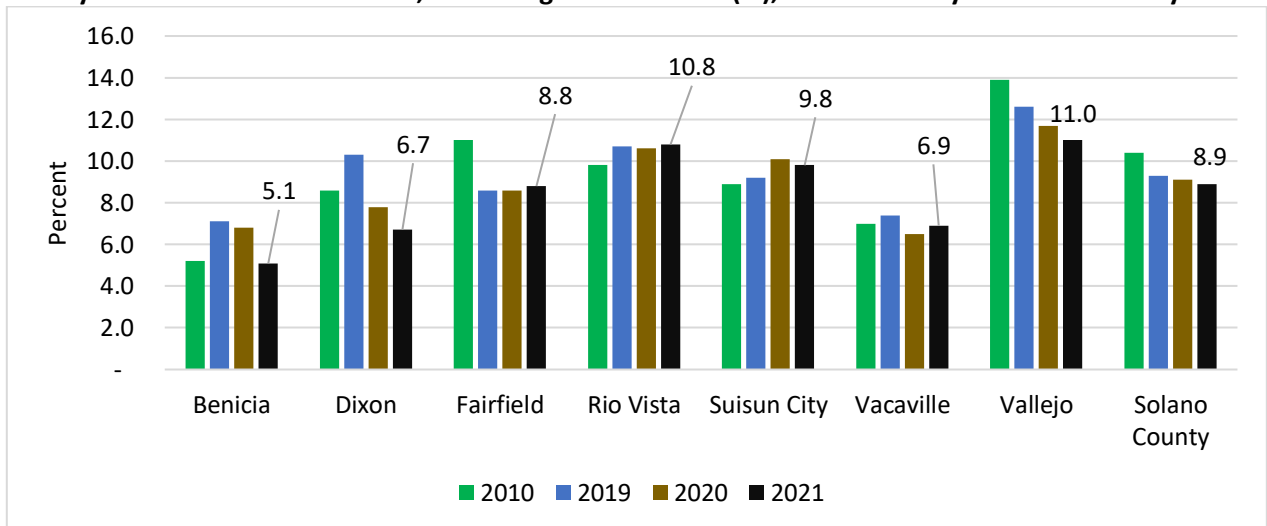
Jobs recovery and additional federal stimulus payments in 2021 helped all comparisons areas to reduce poverty conditions. Poverty rates fell across Solano County’s cities and the state of California in the 2021 data; poverty rates shown here are based on averages over five years from the ACS. Solano County had a poverty rate of 8.9 percent in 2021 (down from 9.1 percent in the 2020 data).

**Poverty Rates, 2010, 2019, 2020, 2021, Percent (%) of Residents in Solano County, California and United States**



Source: American Community Survey (ACS) Table DP03, 5-Year Averages: <http://data.census.gov>

## Poverty Rates in 2010 and 2019-21, Percentage of Residents (%), Solano County Cities and County Overall



Source: American Community Survey (ACS) Table DP03: <http://data.census.gov>

**TAKEAWAY:** Poverty rates continued to fall in the 2021 Census data, suggesting a mix of fiscal stimulus and jobs recovery helped all households, including Solano County’s lower-income households.

**TAILWIND:** Lower poverty rates, especially after the pandemic shock, suggest the policies followed in the pandemic helped lower-income households, including keeping children in school and increasing graduation rates and college readiness.



## Index of Economic and Community Progress

### Agriculture

Agricultural values increased in 2021 for Solano County from a downturn in 2020 (the latest data from the Solano County Agricultural Commissioner were released in April 2023). Solano County's farmers are a base or traded industry. Farmers, like other industries, were affected in terms of their ability to produce goods during the pandemic; farmers have also faced drought conditions for several years. The 2021 data show growth in value across all major crops and livestock except for walnuts from 2020. Aggregate values are at the largest value in nominal terms of Solano County's farmers since 2009.

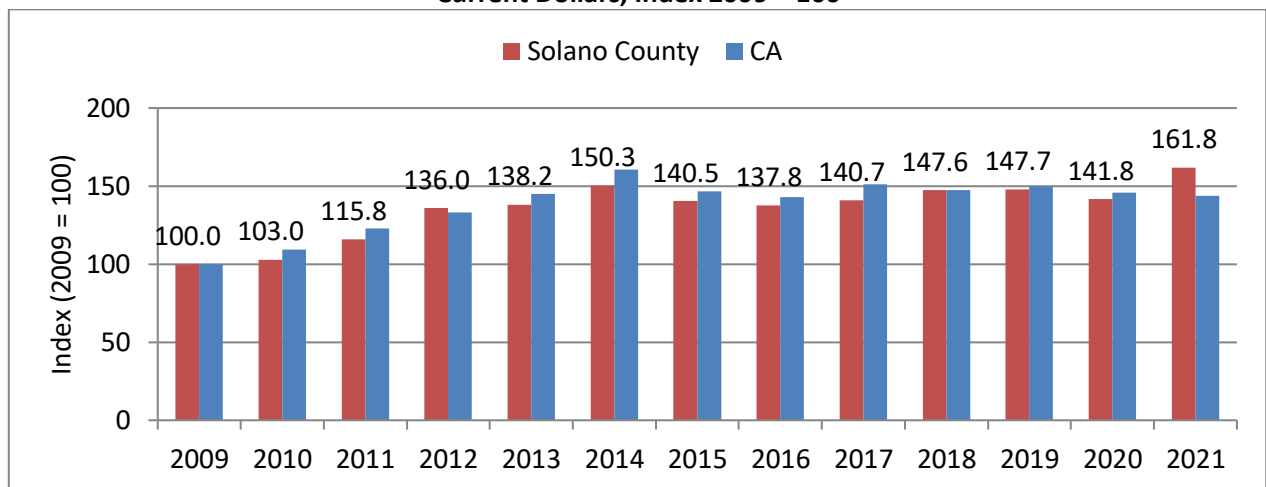
**Solano County Top 10 Agricultural Industry Revenues (\$)  
2015, 2019, 2020 and 2021, Sorted by 2021 Values**

Agricultural Product	2015	2019	2020	2021
<b>Total Solano County</b>	<b>\$353,869,000</b>	<b>\$ 372,113,000</b>	<b>\$ 357,159,000</b>	<b>\$ 407,642,000</b>
Almonds	\$ 23,603,000	\$ 55,312,000	\$ 50,700,000	\$ 71,123,000
Tomatoes (Processed)	\$ 42,156,000	\$ 37,041,000	\$ 38,078,000	\$ 44,108,000
Nursery Products	\$ 37,648,000	\$ 31,231,000	\$ 37,466,000	\$ 43,086,000
Cattle/Calves	\$ 27,556,000	\$ 36,967,000	\$ 36,069,000	\$ 31,882,000
Alfalfa	\$ 34,821,000	\$ 27,159,000	\$ 26,142,000	\$ 28,606,000
Grapes	\$ 14,988,000	\$ 21,587,000	\$ 21,189,000	\$ 25,442,000
Walnuts	\$ 37,912,000	\$ 27,492,000	\$ 22,519,000	\$ 20,312,000
Sunflower Seeds	\$ 6,904,000	\$ 15,666,000	\$ 10,482,000	\$ 10,529,000
All Other Ag Products	\$ 112,505,000	\$ 109,447,000	\$ 114,514,000	\$ 132,554,000

Source: Solano County Agricultural Commissioner

([http://solanocounty.com/depts/agriculture/crop\\_report/2009\\_2019.asp](http://solanocounty.com/depts/agriculture/crop_report/2009_2019.asp))

**Total Agricultural Value, Solano County and California, 2009 to 2021  
Current Dollars, Index 2009 = 100**



Sources: BEA ([www.bea.gov](http://www.bea.gov)) and Solano County Agricultural Commissioner

**TAKEAWAY:** Farmers bounced back in 2021 from 2020 with rising agricultural values in all major crops, though rising prices added nominal value to farmer revenues also.

**HEADWINDS:** Rising costs of doing business and continued drought (even with the wet winter of 2022-23) remain as strategic threats to Solano County's farmers, though parts of the agricultural supply chain are called out as targeted industries for economic development efforts in Solano County for 2023 and beyond.

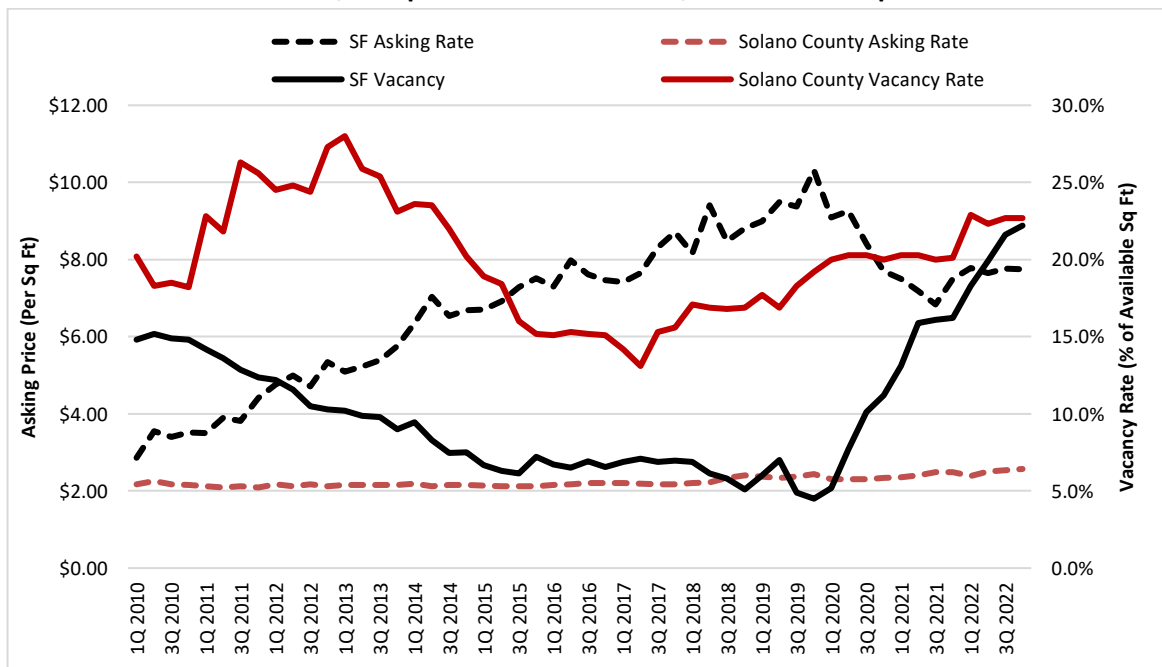
# Index of Economic and Community Progress

## Commercial RE and Building Permits

### Commercial Real Estate Pricing and Vacancy

Commercial real estate markets remain a concern, specifically in office, retail and restaurant spaces. Data here focus on office spaces, as vacancy rates for office have ticked up since 2019. For Solano County, asking prices for office increased in 2022 after decreasing slightly in 2021 and then rising again. Prices for office space in San Francisco continue to have downward pressure versus pre-pandemic levels as vacancy rates increased. Industrial space vacancy in Solano County and throughout the Bay Area remains low at approximately 5.1 percent, some of which is new construction yet to be occupied.

**Solano County Office Space Asking Lease Rates (\$)/Sq. Ft. and Vacancy Rates (%), 2010 Q1 to 2022 Q4, Compared to San Francisco, Class A and B Spaces Combined**



Source: [Colliers International, Quarterly Reports](#)

Asking Price is indicated on the left-hand axis; Vacancy Rate is indicated on the right-hand axis.

**TAKEAWAY:** Office space continued to be pressured as the economy recovers from the pandemic shock on how and where work takes place. Solano County’s office spaces saw vacancy rates rise in 2022, but prices also rise as demand for Class A spaces with more choice increased slightly.

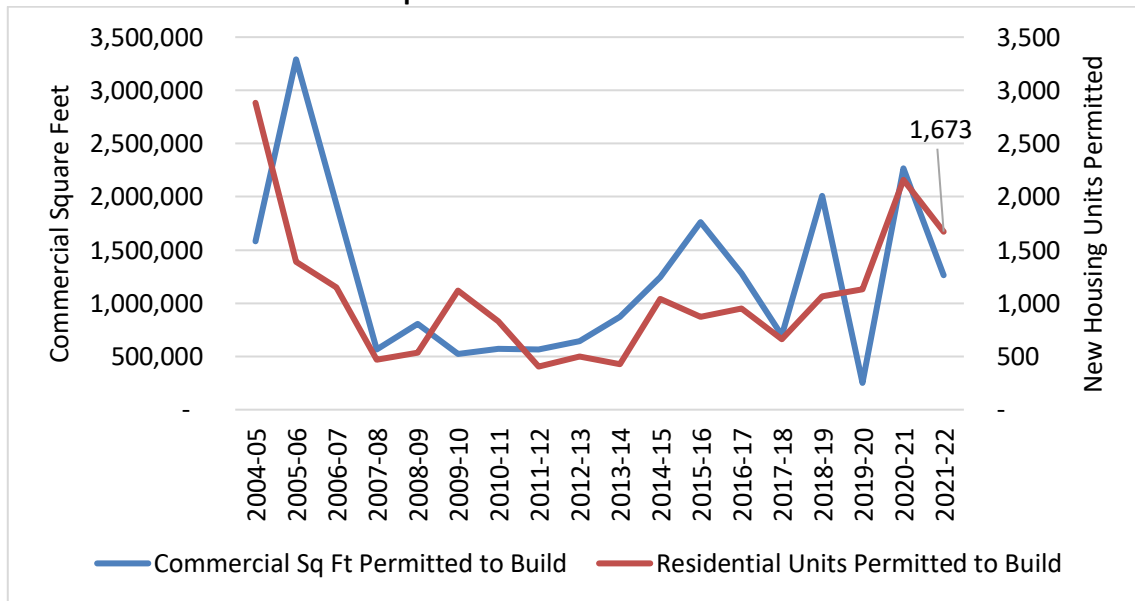
**HEADWINDS:** Larger retailers, especially those that occupy mall spaces, and office buildings will continue to be pressured to maintain occupancy to 2030. Solano County should expect the housing-needs conversation and vacant office space to be combined over time into planning for vacant office spaces into housing units.

# Index of Economic and Community Progress

## Building Permits

Building permits for new residential units in Solano County increased at a slower pace in fiscal year 2021-22, 1,673 units permitted versus 2,157 units permitted in fiscal year 2020-21. Permitted, commercial square feet grew by more than 1.265 million square feet in fiscal year 2021-22, also slower than the previous year.

**Solano County Residential and Commercial Building Permits, Fiscal Years 2004-05 to 2021-22**  
**Commercial Square Feet and Residential Units Permitted**



Source: County of Solano, data provided by county staff

**TAKEAWAY:** Growth of new, permitted housing units and commercial spaces slowed down in fiscal year 2021-22 for Solano County, but a higher level than most of the years between fiscal years 2004-05 to 2020-21.

**TAILWINDS:** Permitted spaces are potential expansions of productive capacity (commercial) and Solano County’s housing stock (housing) that assist economic development efforts throughout Solano County and the region. Once these spaces and units are started, jobs are created and expand how the construction industry supports Solano County’s economy.

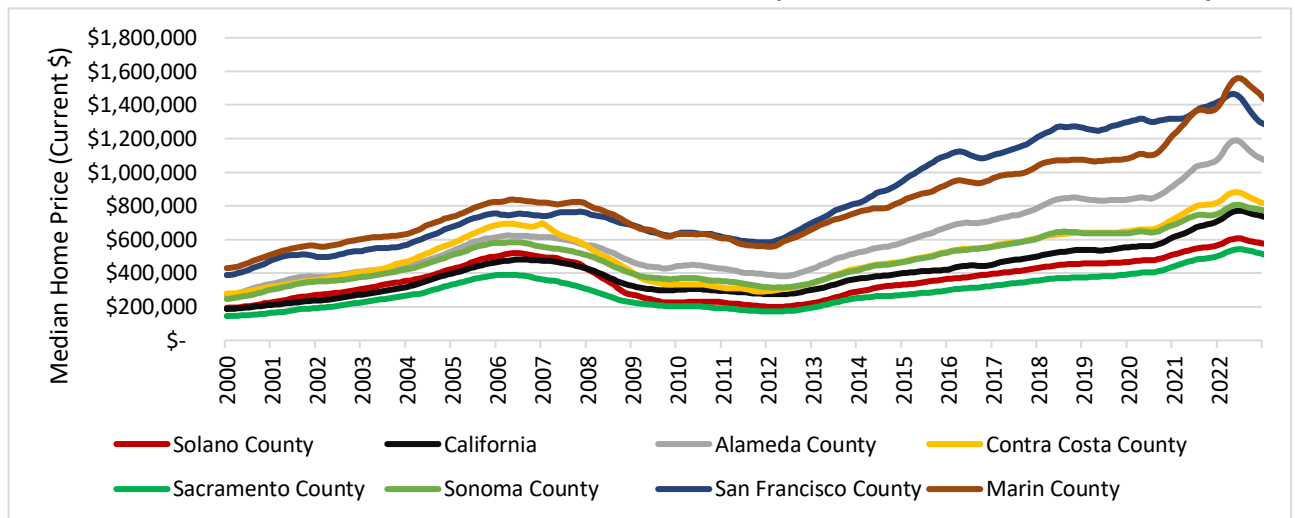
## Index of Economic and Community Progress

### Housing Markets

#### Median Home Prices and Affordability

Solano County's median home price continued to increase in the first half of 2022, then began to fall for a net change of +2.3 percent in 2022. However, since December 2019 (pre-pandemic), Solano County's median home price increased by 24.5 percent to end 2022 at a median price of approximately \$578,610. The statewide median home price was \$742,360 according to Zillow™ Research, a price increase of 5.6 percent in calendar year 2022. The first figure shows home prices in current dollars for selected places and California on average as compared to Solano County from January 2000 to December 2022.

**Median Home Price, 2000 to 2022, Selected Area Comparisons in Current Dollars, Monthly**



Source: Zillow® Research (<https://www.zillow.com/research/data/>)

Note: Sacramento and San Francisco counties are shown alone based on their size within their respective metro areas (MSAs).

Housing affordability continued to decline for Solano County residents in 2022. This measure is from California Association of REALTORS® and is called the “Housing Affordability Index” or HAI. The HAI is a ratio of households that can pay the cost of owning a home (mortgage, average cost of utilities and maintenance, etc.) at the current median household income in an area. With housing prices in 2022 still at relatively-high levels since 2010, incomes rising have not consistently kept up with costs of owning a home.

**Housing Affordability Index, 2010 Q3 to 2022 Q3, Selected Years**  
**Percent (%) of Households That Can Afford a Median-Priced Home**

Quarter	Solano	Sacramento	Calif.	Sonoma	Napa	Santa Clara	Alameda	Contra Costa	Marin	San Francisco
2010.Q3	71%	68%	46%	40%	41%	30%	31%	21%	23%	22%
2015.Q3	45%	47%	29%	26%	23%	19%	20%	34%	19%	11%
2016.Q3	43%	43%	30%	26%	24%	21%	23%	36%	18%	13%
2017.Q3	43%	43%	28%	25%	26%	17%	20%	33%	18%	13%
2018.Q3	38%	42%	27%	22%	24%	17%	18%	32%	19%	15%
2019.Q3	47%	45%	31%	28%	29%	22%	26%	39%	22%	18%
2020.Q3	45%	44%	28%	29%	27%	22%	24%	34%	22%	20%
2021.Q3	42%	39%	24%	28%	23%	22%	19%	31%	22%	21%
2022.Q3	30%	29%	18%	19%	13%	20%	17%	25%	18%	20%

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

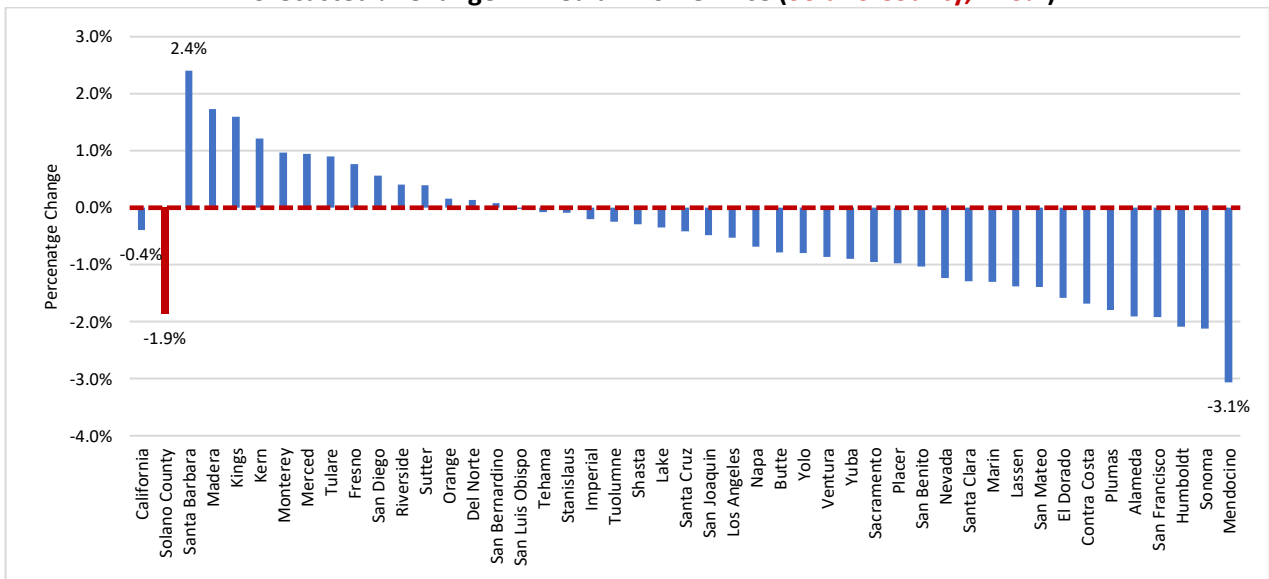
Quarter 3 2022 is the latest data point as of March 2023

# Index of Economic and Community Progress

## Median Home Price Forecasts

Solano County is forecasted a year of median home prices **declining**. The latest forecast (as of April 2023) per Zillow™ Research is -1.9 percent decline for Solano County from March 2023 to March 2024. This growth forecast is larger than all regional comparison areas. As predicted in the 2021 Index edition, market prices have now fallen and interest rates rising are starting to affect housing markets, though slightly less than expected.

**Housing Forecast, March 2023 to March 2024, California and California Metro Areas, Forecasted % Change in Median Home Price (Solano County, -1.9%)**



Source: Zillow® Research (<https://www.zillow.com/research/data/>), March 2023 to March 2024 Forecast latest available as of April 2023

**TAKEAWAY:** Housing prices increased slightly in 2022, and were falling from peaks in summer 2022 as the calendar year ended. A combination of higher interest rates, concerns over economic growth and jobs in 2023 and 2024 are reducing demand for homes; the amount of inventory coming onto market has been slow to change, helping lower housing prices remain predictable and manageable versus the Great Recession downturns between 2007 and 2010 in Solano County.

**HEADWINDS:** While lower housing prices may be coming, this does not mean housing affordability will change. Such affordability issues can affect wages and the mix of workers and businesses that consider locating in Solano County; however, versus its Bay Area neighbors, Solano County remains a relatively affordable option for workers as a place to live.

## Index of Economic and Community Progress

### Social Equity Metrics: Baseline for Monitoring in Solano County

The 2021 Index of Economic and Community Indicators added three data points as “social equity” metrics. These variables provide a lens on social equity progress for Solano County by race or ethnicity (in the Census Bureau data, “ethnicity” is split between Hispanic and Non-Hispanic; race includes those that identify as Hispanic or not across classic racial categories). The metrics include median household income by the head of household’s race/ethnicity, poverty rates by race/ethnicity, and homeownership by race/ethnicity. Median household income has been inflation-adjusted to show “real” progress for different groups in 2012 dollars.

**Median Household Income, 2012, 2020 and 2021, 2012 Dollars, Solano County, California and United States**

2012			
Race/Ethnicity	US	CA	Solano County
Hispanic	\$41,994	\$47,332	\$58,090
White	\$57,952	\$71,357	\$73,720
African-American	\$35,564	\$44,609	\$54,848
Asian-American	\$71,709	\$76,337	\$82,010
2020			
Race/Ethnicity	US	CA	Solano County
Hispanic	\$48,465	\$49,000	\$64,810
White	\$62,846	\$75,538	\$75,580
African-American	\$38,744	\$45,889	\$55,595
Asian-American	\$81,415	\$84,623	\$84,925
2021			
Race/Ethnicity	US	CA	Solano County
Hispanic	\$49,808	\$53,897	\$66,127
White	\$62,298	\$70,939	\$74,745
African-American	\$39,311	\$47,197	\$55,250
Asian-American	\$83,338	\$86,838	\$84,199

Source: American Community Survey, 5 Year Average, Census Bureau, (<http://data.census.gov>), 2021 the latest data available as of March 2023

Median household Income (MHI) increased in 2021 for Hispanic residents of Solano County compared to 2020, but poverty rates fell for all communities, including black, indigenous and people of color communities (BIPOC), basically those that identify as non-white. We summarize those communities using the data for African-American, Asian-American and Hispanic

residents.

**Poverty Rates, 2012, 2020 and 2021, Percent of Population Below Annual Poverty Threshold Solano County, California and United States**

Race/Ethnicity	2012			2020			2021		
	US	CA	Solano County	US	CA	Solano County	US	CA	Solano County
Hispanic or Latino origin	24.1%	22.0%	18.1%	18.3%	16.2%	10.8%	17.7%	15.5%	10.4%
White/Caucasian	12.1%	13.5%	9.5%	10.6%	11.4%	7.8%	10.3%	10.9%	7.7%
African-American	26.5%	22.6%	19.0%	22.1%	19.6%	15.8%	21.7%	19.2%	16.3%
Asian-American	12.1%	11.4%	7.0%	10.6%	10.0%	5.8%	10.3%	9.9%	5.5%

Source: American Community Survey, 5 Year Average, Census Bureau, (<http://data.census.gov>), 2021 the latest data, March 2023

## Index of Economic and Community Progress

Homeownership remains a measure of social progress. While homeownership gains continued in Solano County in 2021, and that mix shows more support for diverse communities in Solano County than California or the nation, communities of color still need to be supported by economic and workforce development efforts.

### Owner versus Rental, Percentage of Occupied Households by Race or Ethnicity of Head of Household Years 2012, 2020 and 2021, Solano County, California and United States

Owner				Renter			
	2012				2012		
Race/Ethnicity	US	CA	Solano County	Race/Ethnicity	US	CA	Solano County
Hispanic	47.5%	44.3%	52.4%	Hispanic	52.5%	55.7%	47.6%
White	70.6%	60.4%	69.2%	White	29.4%	39.6%	30.8%
African-American	44.5%	36.8%	47.4%	African-American	55.5%	63.2%	52.6%
Asian-American	58.3%	57.1%	68.8%	Asian-American	41.7%	42.9%	31.2%
	2020				2020		
Race/Ethnicity	US	CA	Solano County	Race/Ethnicity	US	CA	Solano County
Hispanic	48.6%	44.9%	54.7%	Hispanic	51.4%	55.1%	45.3%
White	70.1%	59.4%	66.4%	White	29.9%	40.6%	33.6%
African-American	42.4%	35.5%	43.6%	African-American	57.6%	64.5%	56.4%
Asian-American	60.0%	59.7%	70.8%	Asian-American	40.0%	40.3%	29.2%
	2021				2021		
Race/Ethnicity	US	CA	Solano County	Race/Ethnicity	US	CA	Solano County
Hispanic	49.4%	45.4%	55.1%	Hispanic	50.6%	54.6%	44.9%
White	70.6%	60.0%	66.9%	White	29.4%	40.0%	33.1%
African-American	42.7%	35.6%	44.1%	African-American	57.3%	64.4%	55.9%
Asian-American	60.1%	60.4%	71.9%	Asian-American	39.9%	39.6%	29.1%

Source: American Community Survey, 5-Year Averages ending in stated year (2017-21 latest data as of March 2023) Census Bureau, (<http://data.census.gov>)

**TAKEAWAY:** Though median household incomes decreased, poverty rates fell and homeownership increased for all communities – including BIPOC communities – in Solano County in the 2021 data (the latest available).

**HEADWINDS:** Since these are five-year averages and the pandemic initially provided more income as federal stimulus and homeowner incentives, those have reversed as of 2022 and into 2023 and inflation has been undermining household outcomes since late 2021. We should expect slower gains and more pressure on poverty in data through 2025.

We now look at community indicators for Solano County.





# Index of Economic and Community Progress

## People

### Population Growth

Population growth continued to fall in Solano County, regionally and statewide in 2022. Solano County’s population decreased by 2,132 residents (-0.48 percent) in 2022 to 443,749. The Bay Area Other and North Bay counties combined have lost over 200,000 residents since 2019 (pre-pandemic levels). California’s population fell in 2022 (third year in a row and the only three years on record) by approximately 175,374 people (a cumulative loss of almost 668,700 residents in net since 2019). Compared to 2020, Solano County is forecasted to have 21.9 percent population growth through 2050. The Sacramento metropolitan area is forecasted for faster growth than Solano County, but has also lost population in net since 2020.

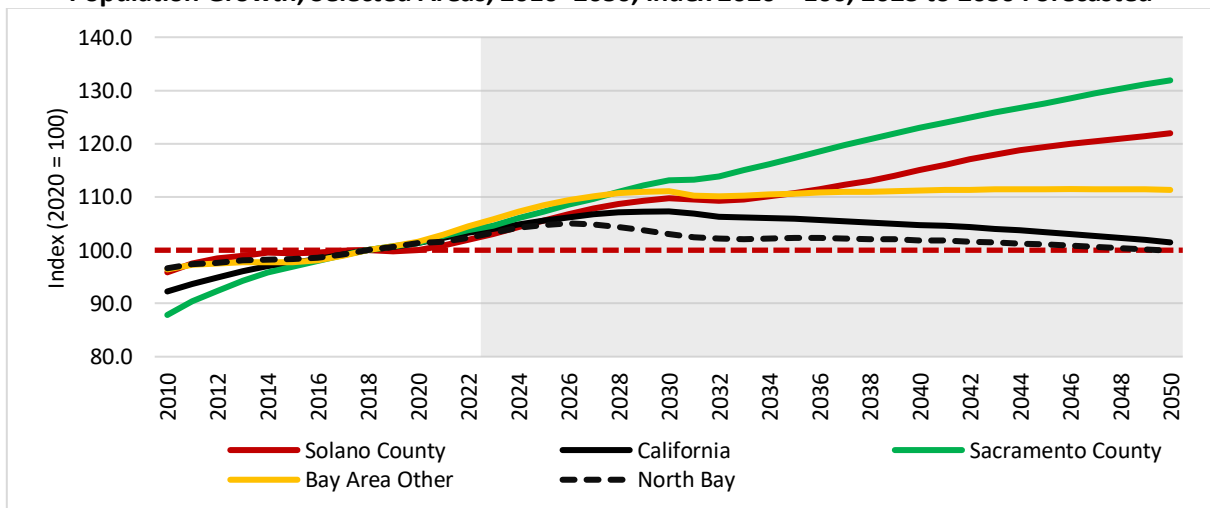
**Change in Total Population, compared to January 1, 2023**  
**Number of People and Percent (%) Change, Solano County and Selected Comparison Areas**

Place	Change in Population				Percentage Change compared to 2022			
	2010	2020	2021	2022	2010	2020	2021	2022
Solano County	15,119	(9,742)	(5,367)	(2,132)	3.53%	-2.15%	-1.20%	-0.48%
California	1,682,727	(668,678)	(380,034)	(175,374)	4.52%	-1.69%	-0.97%	-0.45%
Sacramento MSA	189,555	(4,738)	204	(1,618)	8.60%	-0.20%	0.01%	-0.07%
Bay Area Other	361,712	(183,673)	(103,740)	(25,597)	6.15%	-2.86%	-1.64%	-0.41%
North Bay	801	(23,433)	(14,856)	(6,264)	0.09%	-2.64%	-1.69%	-0.72%

Source: California Department of Finance, Demographic Research Unit ([www.dof.ca.gov](http://www.dof.ca.gov)), Census 2020 Benchmark As of May 2023, California Department of Finance finalized its 2010-2019 Population Estimates for Census 2010

### Population Growth Projections

**Population Growth, Selected Areas, 2010–2050, Index 2020 = 100, 2023 to 2050 Forecasted**



Source: California Department of Transportation, Socioeconomic Forecast, Revised April 2023 (<https://tinyurl.com/CalTrans2022>)

**TAKEAWAY:** Solano County’s population fell again in 2022 (third year in a row), as did the population in other comparison areas regionally, including Sacramento’s metro area (though a much smaller percentage change).

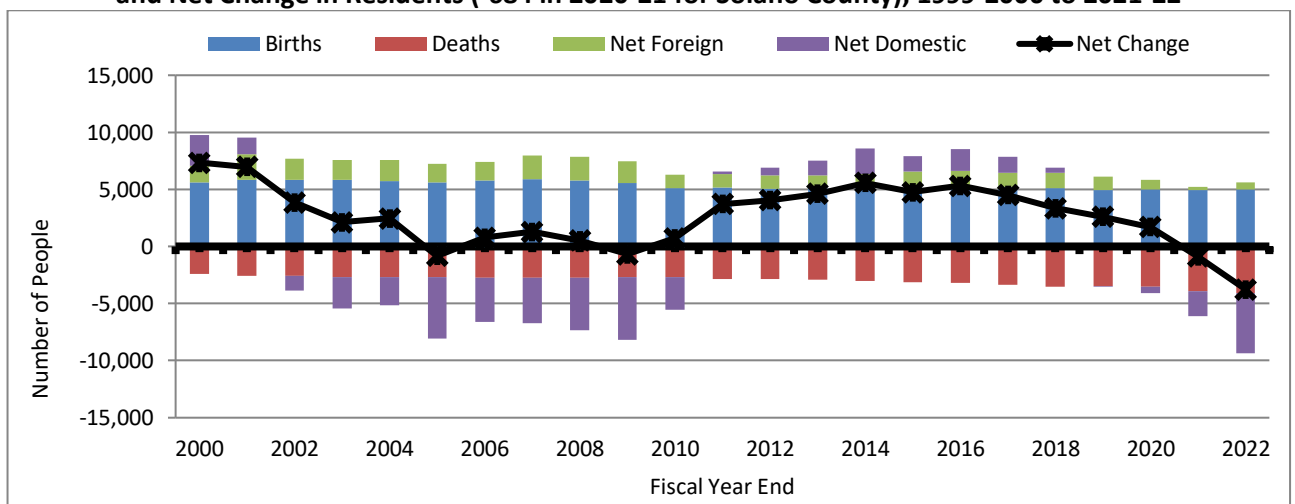
**HEADWINDS:** While forecasts see growth through 2050 of approximately 22 percent, it is important that Solano County reverse its recent trend of losing population since the pandemic. Population loss affects local workforce availability, wages, housing demand, and support for community organizations and public schools.

# Index of Economic and Community Progress

## Components of Population Change

Solano County’s population decreased in fiscal year 2021-22 primarily due to continued outbound migration in net to other parts of the United States (“Net Domestic” change in the data shown below). These data show the ways population changes and that change for Solano County over time. More foreign immigrants in net (“Net Foreign”) came to Solano County in fiscal-year 2021-22 once Solano County’s economy opened back up after the pandemic more completely; components of change are provided on a fiscal-year basis, where overall population and housing stock estimates are calendar-year measures by California Department of Finance.

**Solano County Components of Population Change (People) from Previous Fiscal Year, (July 1 to June 30) and Net Change in Residents (-684 in 2020-21 for Solano County), 1999-2000 to 2021-22**



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

Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad (Foreign); and the balance of hundreds of thousands of people moving to and from California from within the United States (Domestic).

### Solano County Change in Population Compared to 2022, Number of People

Fiscal Year End	Births	Deaths	Net New Residents from other Countries (Net Foreign)	Net New Residents from the United States (Net Domestic)	Net New Residents Moving to Solano County
2010-22	61,297	-39,950	12,750	1,478	35,575
2019-22	14,960	-11,561	1,694	-8,022	-2,929
2020-22	9,940	-8,033	904	-7,444	-4,633
2021-22	4,988	-4,101	623	-5,270	-3,760

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

**TAKEAWAY:** Solano County’s fiscal year 2021-22 showed another year of population decline for Solano County, though the changes are slower than North Bay and Bay Area Other counties.

**HEADWINDS:** It is important to recognize why population is changing; for Solano County, people leaving for other parts of the United States is likely a function of relatively-high housing prices regionally, a lack of job prospects or a mix.

## Index of Economic and Community Progress

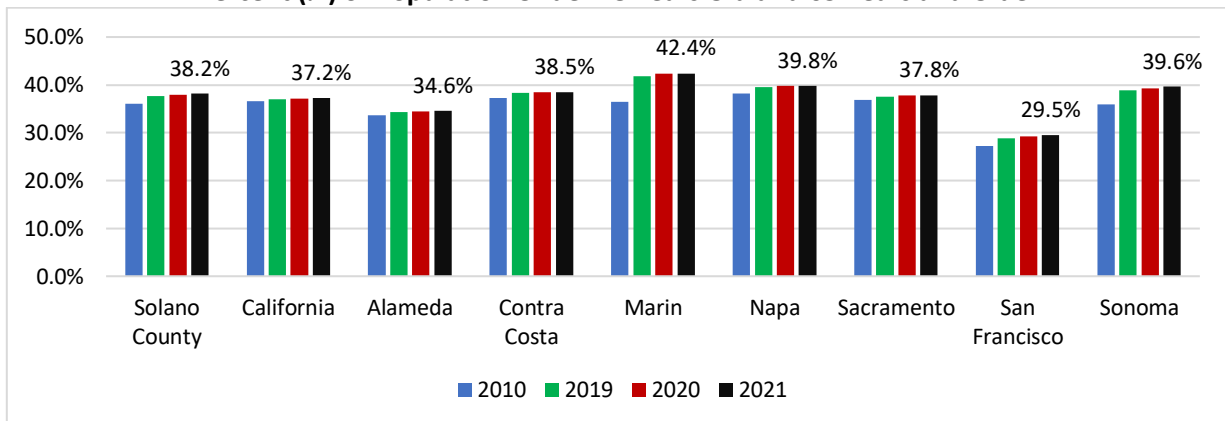
### Workforce Readiness and Supply

#### Dependency Ratios, High-School Graduation Rates and UC/CSU Readiness

##### Dependency Ratio

Solano County's total dependency ratio -- the percentage of area residents 65 and older and also children under 18 years of age in sum -- was 38.2 percent in 2021 (the latest data available). These data compare across the region and since 2010, as this is a data point that should change slowly as populations evolve; San Francisco County is younger versus Marin County which is older. However, all comparison areas have seen their dependent populations rise in proportion to 2010, including the Sacramento metro area.

**Total Dependency Ratio, Comparison Between Selected Areas, 2010, 2019, 2020, 2021**  
Percent (%) of Population Under 18 Years Old and 65 Years and Older



Source: Census Bureau ([www.census.gov](http://www.census.gov)) at <http://data.census.gov>

**TAKEAWAY:** Solano County's dependency ratio increased again in 2021 (0.3 percentage points) compared to 2020. Statewide, the dependent population grew by just 0.1 percentage points.

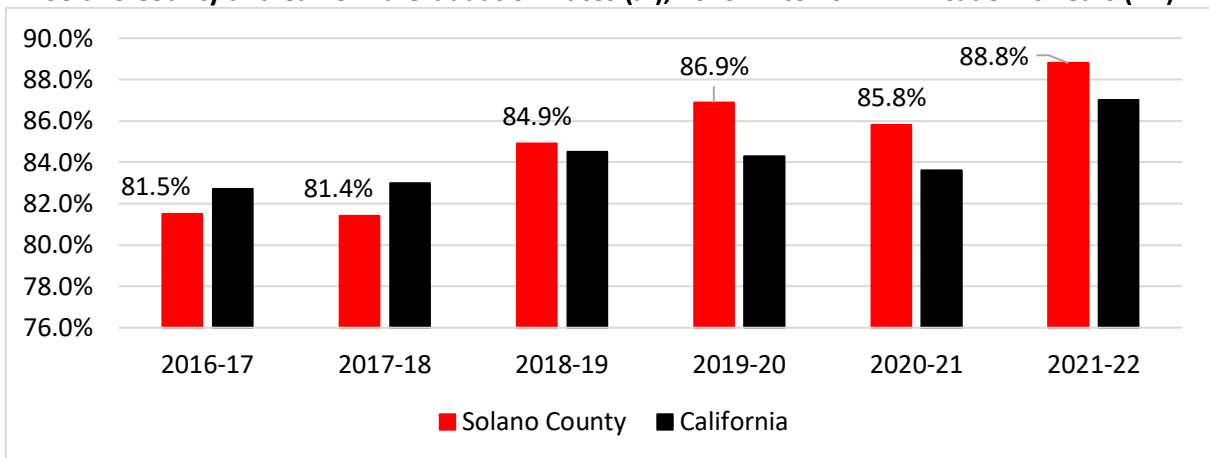
**TAILWINDS:** While a dependent population is split between younger and older residents, we know from other data, Solano County's increase is primarily due to older residents. Some of these residents provide more wealth and potential earning capacity with the correct retooling and workforce development efforts; aging residents should be considered an opportunity.

##### High-School Graduation Rates and CSU/UC Readiness

Solano County's graduation rate increased to 88.8 percent in academic year 2021-22 (the latest data available) versus academic year 2020-21 (85.8 percent). California's graduation rate also increased, likely due to instruction going back to in-person versus online and employers asking for high-school completion as a minimum educational requirement for work. Solano County had its percentage of college-ready graduates increase to 44.5 percent from 43.1 percent in the last two academic years respectively, still down from 50.0 percent in academic year 2019-20 academic year. California, on average, had its college-ready graduates fall slightly from 52.0 percent in academic year 2020-21 to 51.4 percent in academic year 2021-22.

# Index of Economic and Community Progress

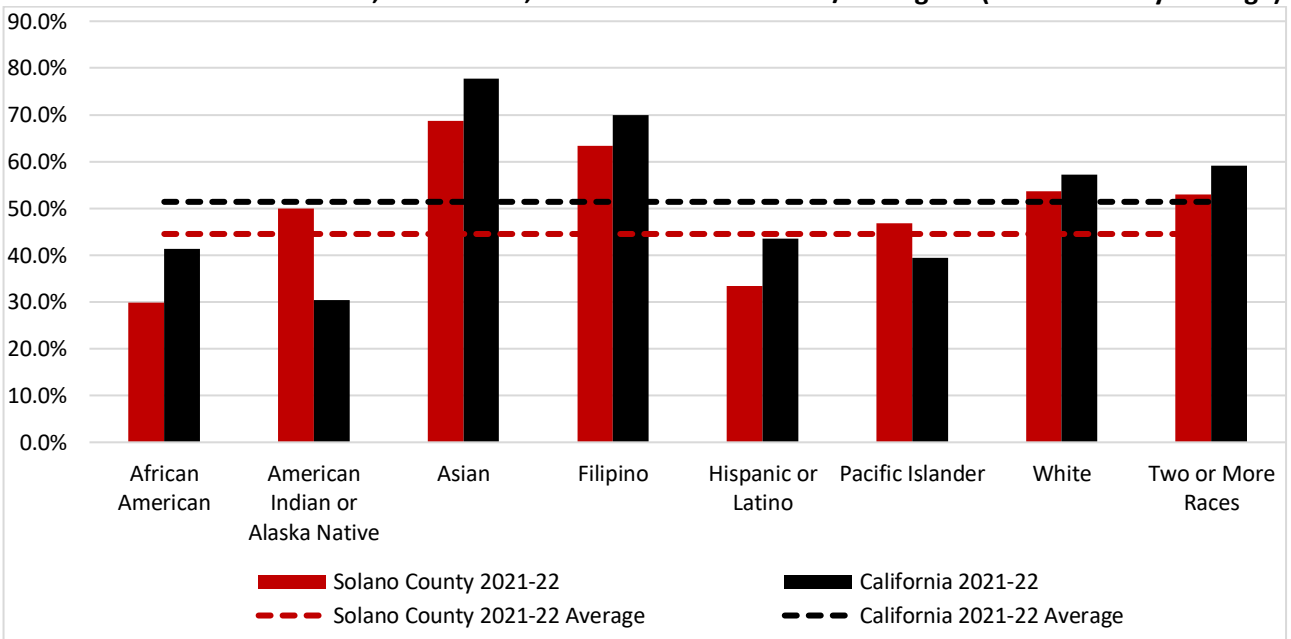
**Solano County and California Graduation Rates (%), 2016-17 to 2021-22 Academic Years (AY)**



Source: California Department of Education ([www.cde.ca.gov](http://www.cde.ca.gov))

Note: There was a methodological change at the Department of Education that does not allow a comparison before 2016-17 academic year with the most recent data.

**Comparisons of Percentages (%) of UC/CSU-Ready Solano County High-School Graduates Selected Races and Ethnicities, AY 2021-22, 44.5% of Graduates CSU/UC Eligible (Solano County Average)**



Source: California Department of Education ([www.cde.ca.gov](http://www.cde.ca.gov))

Note: There was a methodological change warning at the California Department of Education against comparisons before AY 2016-17 with the most recent data.

**TAKEAWAY:** The 2021-22 academic year (AY) was a comeback year for students in Solano County, with graduation rates and college-ready rates rising.

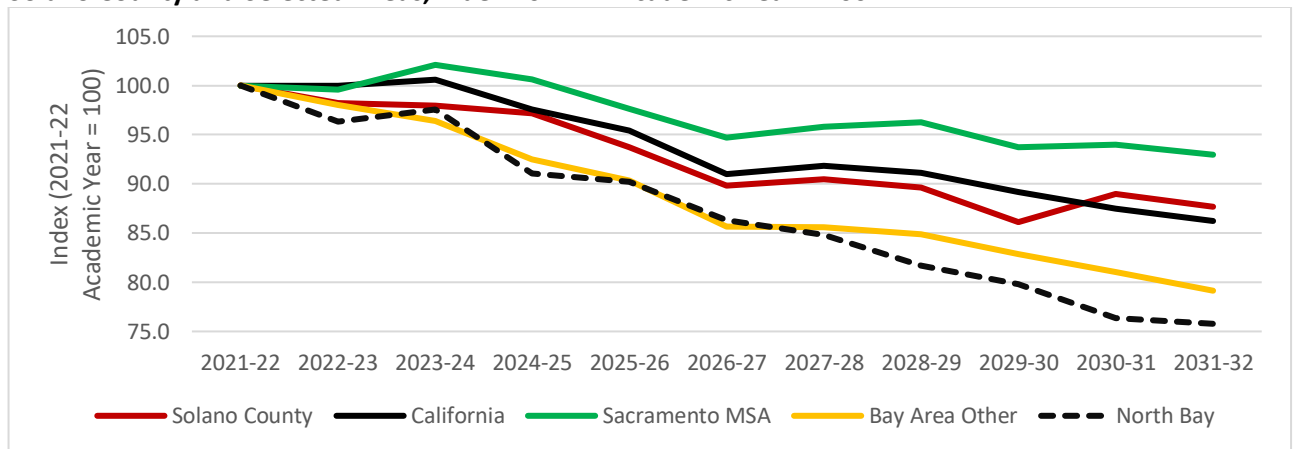
**TAILWINDS:** One concern coming out of the pandemic is less equity in education and returns to college degrees. An opportunity for workforce development is linking a diverse student population to Solano County’s higher-education institutions’ programs and supporting continued, BIPOC student outcomes rising over time, creating a locally-grown workforce.

# Index of Economic and Community Progress

## High School Graduates and K-12 Attendance: The Outlook to 2031-32

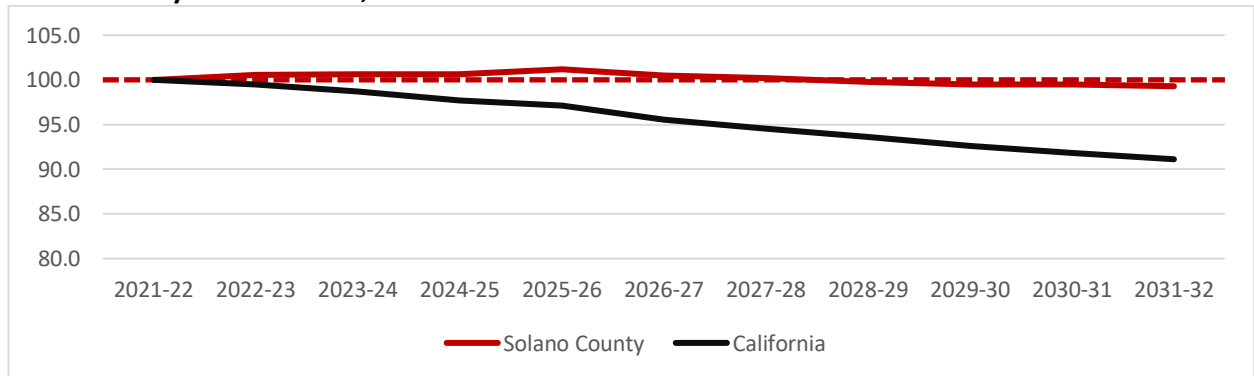
A recent update (from September 2022) to a dismal forecast for changing k-12 attendance levels throughout California is shown here for selected areas and suggests a less-dramatic drop for Solano County. Solano County sees a decline overall, but after attendance rising through most of the 2020s. High-school graduates annually are forecasted to remain in decline across these comparison areas. Such a continued decline represents an older population (households with fewer children) and labor-force levels decreasing over time.

### Public High School Graduates, Academic Years 2021-22 to 2031-32 Solano County and Selected Areas, Index 2021-22 Academic Year = 100



Source: [California Department of Finance](https://www.cdf.ca.gov) and [California Department of Education \(www.cde.ca.gov\)](https://www.cde.ca.gov)

### Public School Attendance Levels, Grades K-12, Academic Years 2021-22 to 2031-32 Solano County and California, Index 2021-22 Academic Year = 100



Source: [California Department of Finance](https://www.cdf.ca.gov) and [California Department of Education \(www.cde.ca.gov\)](https://www.cde.ca.gov)

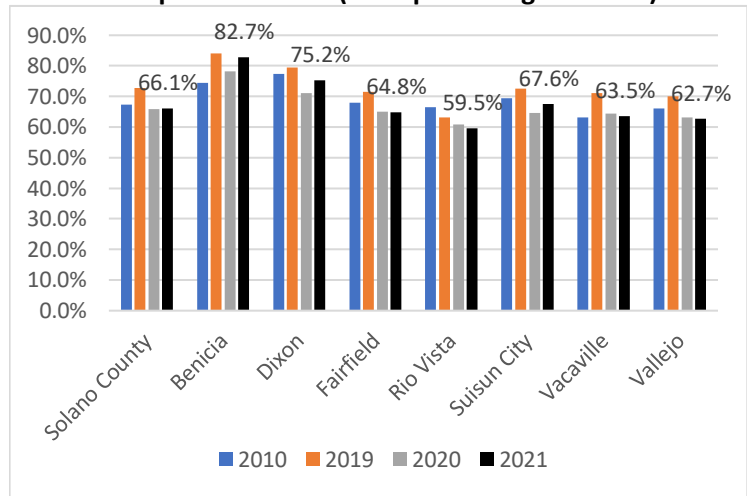
# Index of Economic and Community Progress

## Labor Force Participation Rates

For Solano County’s cities, labor-force participation increased in 2021 (the latest data at the city level) after a quick fall in 2020. Labor force participation rates are recovering across California and the United States through 2022, as measured by the working age (over 18 years old and below 65 years old) population percentage that is employed or considered actively-seeking work (counted as those collecting unemployment insurance).

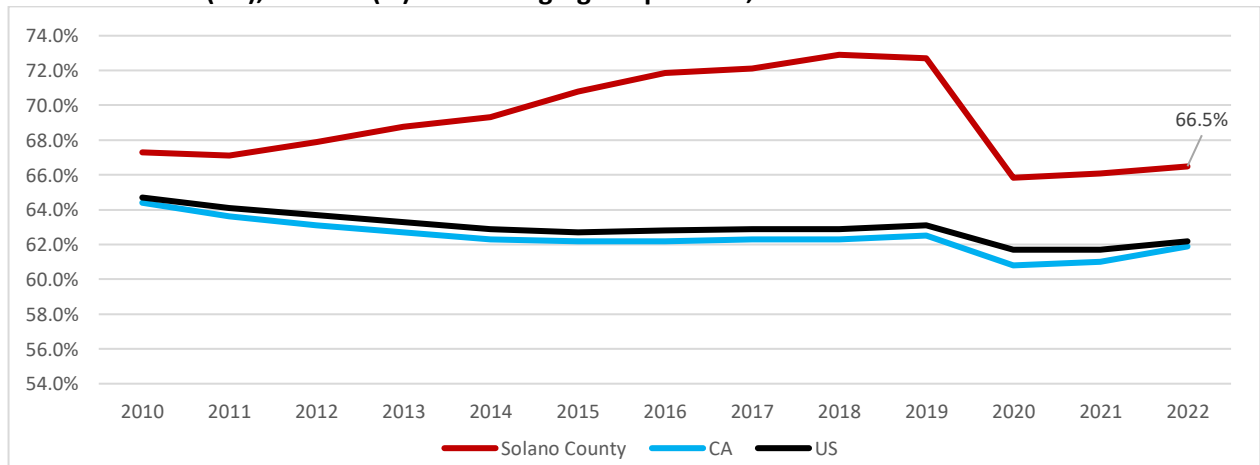
In 2022, Solano County’s estimate is 66.5 percent for labor force participation, rising from 66.1 percent in 2021. Solano County has historically had labor force participation rates above the state and nation on average, as Solano County residents work regionally using Solano County as a place to live.

Labor Force Participation Rates (%), Workers 18 and older, 2010, 2019, 2020, and 2021 Solano County and its Incorporated Areas (2021 percentages shown)



Source: Census Bureau (<http://data.census.gov>)

## Labor Force Participation Rates, 2010 to 2022, Solano County (2022 estimated), California (CA) and United States (US), Percent (%) of Working Age Population, 18 Years Old or more in Labor Force



Sources: California Department of Finance ([Population](#)) and Bureau of Labor Statistics (<http://www.bls.gov>) for Labor Force, where 2022 estimates are the latest as of May 2023.

**TAKEAWAY:** Lower school-attendance levels, fewer high-school graduates and lower labor-force participation rates are all forecasted toward 2030 based on recent declines from 2019.

**TAILWINDS:** While fewer workers may seem like a challenge in the long-term, it is an opportunity to change the way classic workforce and economic development have worked linking training programs through doctoral programs to Solano County employers.

## Index of Economic and Community Progress

### City Overview: Education, Housing and Income

Solano County continues to show improvements in occupied housing units, new construction and residential education levels across its cities. These data are five-year averages (data for years 2017-21 is the latest data available from the Census Bureau).

**Median Age (Years) in Solano County and Its Cities  
2010, 2017, 2018, 2019, 2020, and 2021**

<i>Place</i>	<i>2010</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>
<b>Solano County</b>	<b>36.5</b>	<b>37.7</b>	<b>37.9</b>	<b>38.1</b>	<b>38.3</b>	<b>38.5</b>
United States	36.9	37.8	37.9	38.1	38.2	38.4
California	34.9	36.1	36.3	36.5	36.7	37.0
Benicia	45.0	44.9	45.7	46.1	46.1	45.1
Dixon	32.3	35.0	34.0	34.0	32.3	34.2
Fairfield	32.8	34.8	35.0	34.8	35.0	35.2
Rio Vista	55.8	62.3	62.2	64.4	63.6	64.0
Suisun City	32.7	33.7	34.4	34.4	34.7	36.0
Vacaville	36.7	37.4	37.3	37.5	37.8	37.8
Vallejo	37.5	37.8	38.0	38.4	39.1	39.8

Source: American Community Survey, Census Bureau (<http://data.census.gov>)

**Housing and Occupancy, 5-Year Averages Ending in Stated Year: 2019, 2020 and 2021  
(How many homes are there and what percentage (%) are occupied or vacant.)**

<i>Place</i>	<i>Total Housing Units</i>			<i>Occupied (%)</i>			<i>Vacant (%)</i>		
	<i>2019</i>	<i>2020</i>	<i>2021</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>
<b>Solano County</b>	<b>157,800</b>	<b>159,055</b>	<b>161,341</b>	<b>95.0%</b>	<b>95.1%</b>	<b>95.2%</b>	<b>5.0%</b>	<b>4.9%</b>	<b>4.8%</b>
United States	137,428,986	138,432,751	139,647,020	87.9%	88.4%	88.8%	12.1%	11.6%	11.2%
California	14,175,976	14,210,945	14,328,539	92.0%	92.2%	92.2%	8.0%	7.8%	7.8%
Benicia	11,786	11,984	11,287	95.8%	95.6%	96.1%	4.2%	4.4%	3.9%
Dixon	6,389	6,946	6,692	94.9%	96.1%	96.6%	5.1%	3.9%	3.4%
Fairfield	38,372	38,539	39,020	95.8%	95.6%	95.3%	4.2%	4.4%	4.7%
Rio Vista	5,130	4,921	5,187	93.4%	94.2%	96.9%	6.6%	5.8%	3.1%
Suisun City	9,650	9,553	9,711	96.5%	97.3%	97.5%	3.5%	2.7%	2.5%
Vacaville	34,176	34,579	35,216	95.7%	95.5%	95.0%	4.3%	4.5%	5.0%
Vallejo	44,543	44,280	46,251	94.4%	94.5%	94.9%	5.6%	5.5%	5.1%

Source: American Community Survey, Census Bureau (<http://data.census.gov>)

## Index of Economic and Community Progress

### Income, Household Size, and Education: 2019, 2020 and 2021, Five-Year Averages

Place	Median Household Income (2012 Dollars)			Average Household Size (People/Housing Unit)			Percent (%) of Residents 25 Years or Older with HS Diploma or Better			Percent (%) of Residents 25 Years or Older with Bachelor's Degree or Better		
	2019	2020	2021	2019	2020	2021	2019	2020	2021	2019	2020	2021
Solano County	\$69,139	\$70,648	\$71,766	2.82	2.81	2.82	88.4%	88.7%	88.9%	26.9%	27.1%	27.8%
United States	\$56,436	\$57,657	\$58,482	2.67	2.69	2.60	88.0%	88.5%	88.9%	32.1%	32.9%	33.7%
California	\$63,846	\$65,668	\$67,322	2.93	2.91	2.85	83.3%	83.9%	84.2%	33.9%	34.7%	35.3%
Benicia	\$87,758	\$89,305	\$94,809	2.50	2.50	2.46	96.8%	96.0%	96.0%	44.7%	42.7%	45.2%
Dixon	\$70,071	\$66,330	\$67,411	3.11	3.11	2.96	80.1%	82.7%	84.0%	19.7%	18.7%	21.5%
Fairfield	\$71,757	\$71,955	\$74,149	2.99	2.98	3.01	87.4%	87.4%	97.4%	28.3%	27.9%	28.0%
Rio Vista	\$59,067	\$58,332	\$61,179	2.12	2.11	2.04	93.4%	91.2%	94.0%	33.6%	31.8%	38.3%
Suisun City	\$70,707	\$68,717	\$69,170	3.13	3.12	3.15	88.8%	89.4%	89.1%	21.9%	19.9%	20.5%
Vacaville	\$74,528	\$77,871	\$78,198	2.69	2.68	2.72	89.1%	90.0%	90.2%	23.6%	24.9%	25.0%
Vallejo	\$58,898	\$61,659	\$62,636	2.80	2.80	2.83	88.0%	87.8%	87.8%	25.8%	26.7%	27.4%

Source: American Community Survey, Census Bureau (<http://data.census.gov>)

**TAKEAWAY:** Education levels increased across all of Solano County's cities, suggesting new residents are more educated than those that migrated to other places; every community except for Benicia became slightly older at the median. Occupied housing units increased in 2021 across Solano County's cities except for Fairfield and Vacaville, likely due to new housing units built outpacing new residents.

**TAILWINDS:** Median household incomes have stagnated since the rise in 2020, but an increase in Solano County's population that has a bachelor's degree or higher education reflect higher incomes (which were shown earlier) regionally into the future.

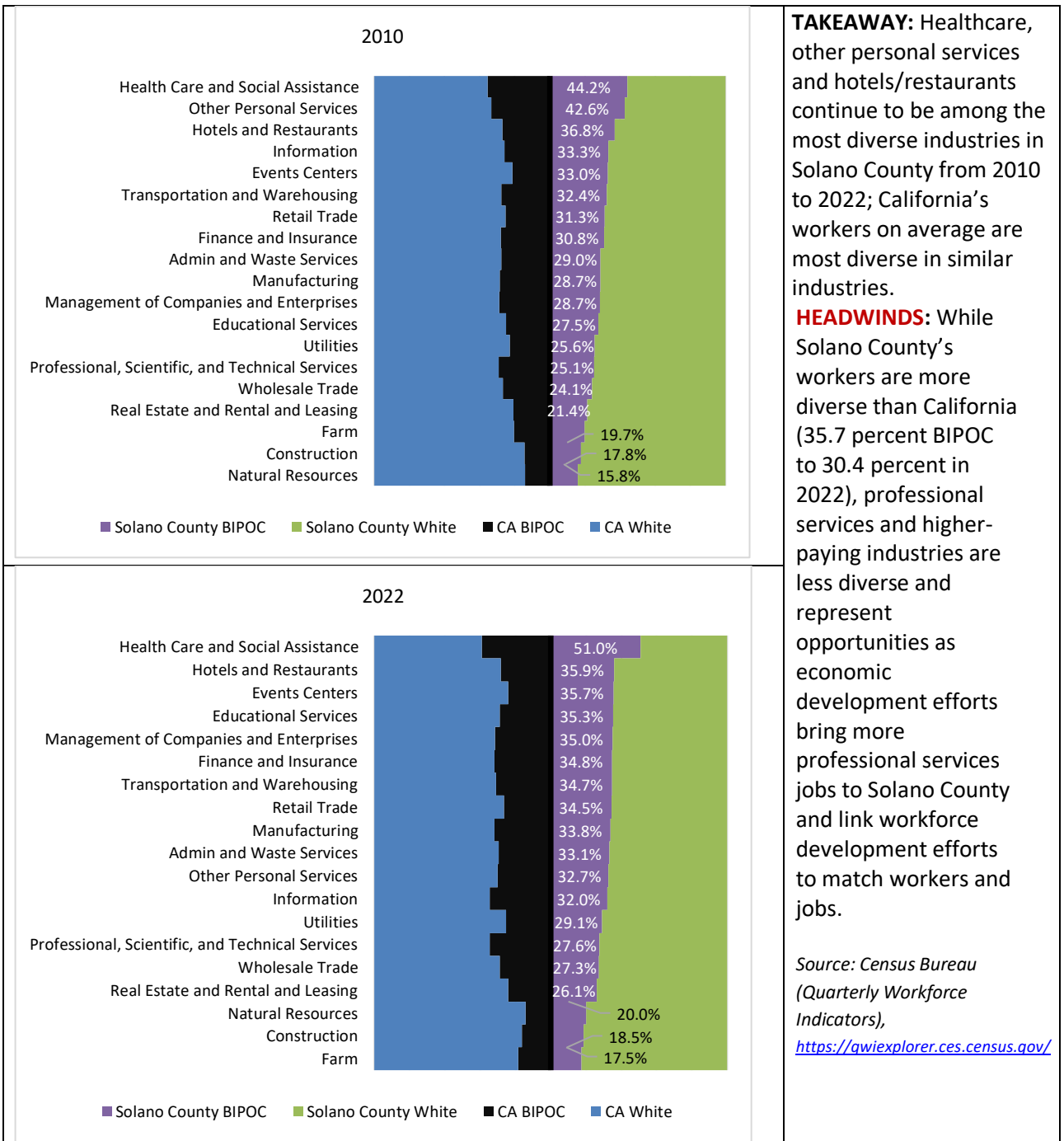


# Index of Economic and Community Progress

## Private-Sector Diversity: How Diverse are Solano County's Workers?

For the 2022 Index, we are adding an angle on diversity, equity and inclusion (DEI). The data here compare Solano County's worker diversity across different industries versus the state of California overall. We show data for black, indigenous and people of color (BIPOC) communities and their white counterparts. The latest data on population diversity is 2021, for worker diversity through Quarter 2 2022; public-sector worker information on ethnicity and race by industry is not available.

### Private-Sector Hiring, BIPOC and White Workers, Solano County and California, 2010 and 2022, % of Total Jobs



**TAKEAWAY:** Healthcare, other personal services and hotels/restaurants continue to be among the most diverse industries in Solano County from 2010 to 2022; California's workers on average are most diverse in similar industries.

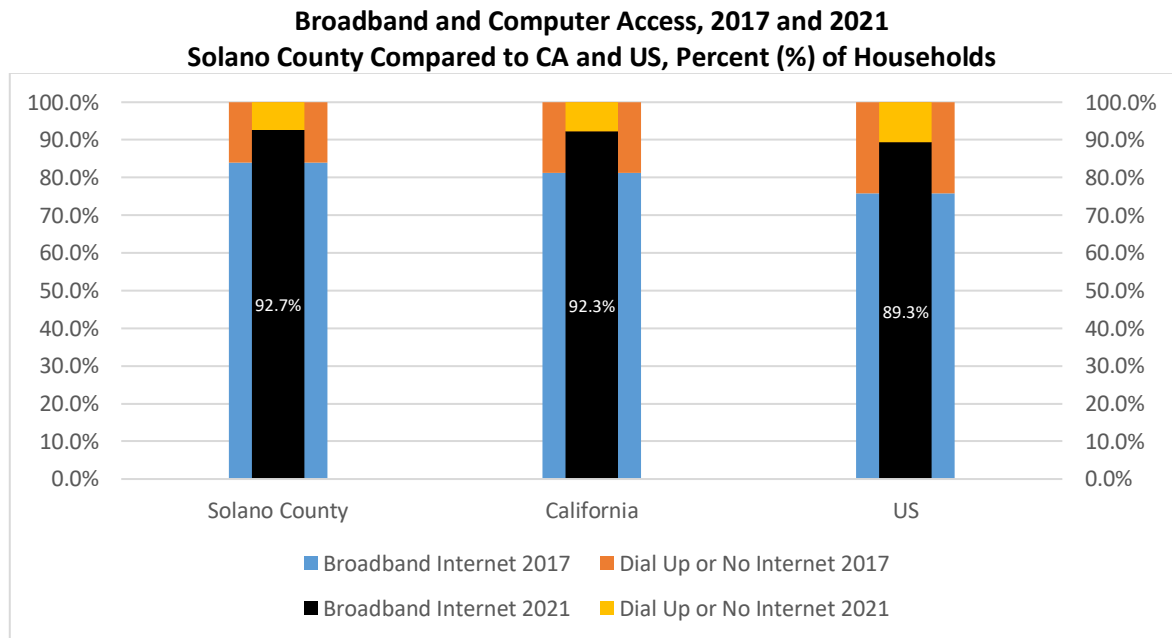
**HEADWINDS:** While Solano County's workers are more diverse than California (35.7 percent BIPOC to 30.4 percent in 2022), professional services and higher-paying industries are less diverse and represent opportunities as economic development efforts bring more professional services jobs to Solano County and link workforce development efforts to match workers and jobs.

Source: Census Bureau (Quarterly Workforce Indicators), <https://qwiexplorer.ces.census.gov/>

## Index of Economic and Community Progress

### Broadband and Computer Access

The Census Bureau's American Community Survey estimates broadband and computer access for households. As Solano County and California recovered in 2021, continued access to the internet, faster connection speeds and thus video communications became more ubiquitous. Data here compare Solano County to the national and state economies overall for 2017 and 2021 as five-year averages (2013 to 2017 and 2017 to 2021, covering 10 years).



**TAKEAWAY:** Solano County remains well connected versus its state and national counterparts, rising slightly in the estimated from 2017 to 2021 (92.7 percent of households have broadband internet in Solano County versus 84.0 percent in 2017). California is slightly less in terms of broadband use at 92.3 percent in 2021, and the US overall continues to lag behind.

**TAILWINDS:** It is critical to view broadband internet access in a similar way to electricity and water as essential utilities to be provided to households. More broadband means more opportunities to expand educational access, telehealth and more economic and workforce and healthcare/community development efforts.

## Index of Economic and Community Progress

### Quality of Place Index

This final section compares data that are meant to describe quality of place in Solano County versus California (San Francisco in the case of housing prices) on average. The current data include high-school graduation rates; commute times; air quality; educational attainment; home purchase and rental prices; and taxable sales per person. In some cases, the data below are ranked out of California's 58 counties. Brief takeaways are provided for each.

#### Quality of Place Elements, 2020 (2019 Data are the latest in some cases)

Element			Key Takeaway
Graduation Rates, High School (Academic Year)			Gains in graduation rates were experienced across California, but Solano County moved up the state rankings as schools moved back to in-person instruction in 2021.
2010-11 44 <sup>th</sup> in CA	2020-21 25 <sup>th</sup> in CA	2021-22 23 <sup>rd</sup> in CA	
Commute Times			Commute times worsened slightly as Solano County residents and those employed in Solano County went back to work generally in 2021.
2010 49 <sup>th</sup> in CA	2020 51 <sup>st</sup> in CA	2021 52 <sup>nd</sup> in CA	
Air Quality			Air quality in 2022 for Solano County continued to improve from 2021 levels compared to the state average.
2010 20 <sup>th</sup> in CA	2021 18 <sup>th</sup> in CA	2022 16 <sup>th</sup> in CA	
Educational Attainment: % of Pop, 25 years old or more, BA min			Solano County's population with a Bachelor's Degree slipped a little in the state rankings, but Solano County's proportion of BA or higher degree holder increased in 2021.
2010 29 <sup>th</sup> in CA	2020 25 <sup>th</sup> in CA	2021 26 <sup>th</sup> in CA	
Home and Rental Prices (as a % of San Francisco County (SF))			Housing and rental prices in San Francisco have fallen faster than any other county statewide, and Solano County's prices have slipped less as 2022 ended. Solano County's home prices remain relatively low regionally.
2010 Rent: 50% of SF Buy: 28% of SF	2021 Rent: 58% of SF Buy: 38% of SF	2022 Rent: 68% of SF Buy: 45% of SF	
Taxable Sales/Capita			Increases in taxable sales took place across California at a faster pace than Solano County, including more travel spending statewide.
2010 98.6% of State Avg.	2021 98.9% of State Avg.	2022 95.4% of State Avg.	

Sources: California Department of Education; American Community Survey; Zillow™ Research; California Air Resources Board; California Board of Equalization and County of Solano, <https://www.epa.gov/outdoor-air-quality-data/air-quality-index-report>  
Quality of Index indicators suggest **opportunities** when in green and **challenges** for policy makers and the community when in red.

**OVERALL TAKEAWAY:** Solano County's Quality of Place data show mixed improvements for Solano County by these metrics, except for taxable sales per person versus the state on average. These are good qualities to showcase as part of economic development efforts.

# Index of Economic and Community Progress

## Data Sources and Methodology

### Solano County Key Facts

#### Area

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

#### Population

Data are from the [California Department of Finance](#) (DOF) for Solano County as part of DOF's estimates for all counties in California. Estimates available in May 2023 are through January 1, 2023.

#### Jobs

Solano County employment data are provided by the [California Employment Development Department \(EDD\)](#). The industry data may include employees who live outside the county. Data from 2022 are preliminary estimates, data before 2022 are official as of March 2023.

#### Population Components

Data are from the [E-6: Population Estimates and Components of Change by County – July 1, 2010–2022](#) report by the California Department of Finance and are for Solano County, the Bay Area Other (including Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara counties), the North Bay (Marin, Napa and Sonoma counties), and for California overall. Estimates for fiscal year 2021-22 are preliminary as of April 2023. Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad, and the balance of people moving to and from California from within the United States.

#### Adult Educational Attainment, Age Distribution, and Ethnic Composition

Data were provided by the [U.S. Census Bureau American Community Survey](#) in December 2022 (the latest data were extracted in March 2023), generally a five-year average of survey data for all areas or just a one-year sample when specified.

#### Taxable Sales and Assessed Property Value

Data for taxable sales are from the State of [California Department of Fee and Tax Administration](#) and the Solano County Department of Finance. The latest data are through calendar year 2022 for taxable sales as of April 2023. Data on the assessed value of land parcels are from the Solano

County Assessor's office. The latest data available are through the end of fiscal-year 2021-22 as of March 2023.

### Our Changing Economy

#### Annual Employment

Solano County employment data are provided by the California Employment Development Department (EDD). The industry data reflects the number of jobs in the county that may pay employees who live outside of the county and are through 2022 as of May 2023.

<https://www.labormarketinfo.edd.ca.gov/data/industries.html>

#### Change in Annual Jobs

Solano County employment data are provided by the California Employment Development Department (EDD). 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 March 2023 and are estimates, see <https://www.labormarketinfo.edd.ca.gov/data/industries.html>. Jobs forecasts to 2050 are also available at [CalTrans](#).

#### Total Employed Residents and

#### Total Unemployed Residents

Solano County resident employment data are provided by the California Employment Development Department (EDD) Local Area Unemployment Statistics (LAUS). The data reflect 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](#) and EDD reports estimates after its own analysis.

#### Non-Employer Data

EFA estimated the change in non-employer business (self-employed businesses that do not have payroll workers) statistics by combining employment data for Solano County from the [Bureau of Economic Analysis](#) (table CAEMP25) and [California EDD](#) estimates of payroll employment. The difference between these two estimates through 2021 is our estimate of changes in self-employed businesses by industry. In previous index editions before 2021, data for non-employers are historically available from the [U.S. Census Bureau](#).

#### Median Household Income

Data for Median Household Income are from the 2003-2021 [American Community Survey data](#) reports from the U.S. Census Bureau as of March 2023. All income values are inflation-adjusted and reported in 2012 dollars, using the California CPI from the California Department of Finance. This California CPI is a weighted average of consumer price

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index (CPI) data that the Bureau of Labor Statistics (BLS) reports for the San Francisco, Los Angeles, and San Diego metropolitan areas.

## Tourism and Visitor Support

Estimated data on visitor spending, jobs that support visitors and tax receipts generated from tourism and hotel stays are provided for all 58 California counties and the state overall by [Dean Runyan Associates](#). Data are from 1992 to 2022 (the latest data were released in April 2023).

## Gross Product

Data are provided by the U.S. Bureau of Economic Analysis through 2021 as of March 2023 ([www.bea.gov](http://www.bea.gov)). Values are inflation-adjusted and reported in 2012 dollars.

## Personal Income

Total personal income and population data are from the [Bureau of Economic Analysis](#). Income values are inflation-adjusted and reported in 2012 dollars, using the California CPI from the [California Department of Finance](#). The latest personal income data are from 2021 as of March 2023.

## Sources of Personal Income

Data are provided by the [Bureau of Economic Analysis](#) (BEA) through 2021. Data are from Personal Income by Major Source and Earnings by NAICS Industry through 2021 as of March 2023. Personal income has been adjusted into 2012 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 data are national.

## Economic Base and Locally-Serving Industries: Moving Solano Forward Phase II

These data come from the Quarterly Census of Employment and Wages (QCEW), allowing for a look at employment, wages, and establishments data at the NAICS 4-digit level. The North American Industry Classification System (NAICS) allows analysis for major industry sectors. These data are the official estimates from the [Bureau of Labor Statistics](#). Data were through Quarter 2 2022 as of March 2023.

## Agriculture

Data on county agriculture and the industries within that sector come from the [Solano County Agricultural Commissioner](#) and the Bureau of Economic Analysis (BEA). The BEA tracks farm incomes, almost like an income statement, annually with a one-year lag. The latest data are from 2021 as of March 2023.

## Poverty Rates

Poverty rates represent the percentage of households under the federal poverty level in terms of household income in a given year. Five-year averages for Solano County are provided by the [American Community Survey](#) of the Census Bureau. The latest data are from 2021 as of March 2023.

## Wages by Occupation

Wages data are available from The California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov)) and the U.S. Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)) by occupation following Standard Occupation Classification (SOC) codes. Wages are adjusted to 2012 dollars using 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. These data are from May 2023 from BLS only.

## Commercial Real Estate

Data on Solano County's commercial real estate comes from author contact with Colliers International's research department. The tracking of office space, both class A and B, as well as industrial space, is from a survey instrument that is proprietary to Colliers. Other commercial real estate firms likely have different estimates, but there is not a governmental source for these data. The latest data in March 2023 are from Quarter 4 2022.

## Housing and RHNA Estimates

Data on forecasted housing units need come from both the [California Department of Finance](#) and [Metropolitan Transportation Commission](#) (MTC). Housing type is estimated by the California Department of Finance as part of its demographic research and housing tenure (own versus rental) data comes from the Census Bureau's American Community Survey. Regional Housing Needs Allocation (RHNA) estimates were available in March 2022 from [Plan Bay Area](#).

Data estimates on housing stock and mix come from the California Department of Finance demography estimates, [Report E-4](#), Population Estimates for Cities, Counties, and the State, 2021-2023 with 2020 Census Benchmark.

## Private-Sector Hiring Diversity

Data on hiring and different demographic characteristics of workers are available at Quarterly Workforce Indicators of Census Bureau: <https://qwiexplorer.ces.census.gov/>.

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## Our Changing Community

### Population Growth Components and Domestic and Foreign Immigration

Data are from the E-6: Population Estimates and Components of Change by County, for fiscal-years 1999-2000 to 2021-22 as reported by the [California Department of Finance](#). These reports cover all 58 counties in California. This Index compares Solano County, the Bay Area Other (including Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties), the North Bay (Napa and Sonoma counties) and California overall. Population projections data for 2023 to 2050 come from the [California Department of Transportation, Long-Term Socioeconomic Forecast](#). The latest estimates are from March 2023.

### 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 [American Community Survey](#) from the U.S. Census Bureau, including the decennial Census years of 2010 and 2020, covering years between 2005 and 2021, available as of December 2022.

### High School Graduation Rates

Data for the 2021–22 academic year are the latest available as provided by the [California Department of Education](#) Educational Demographics Office. The 4-year graduation rate is a percentage estimate of students who graduated from those eligible in a four-year period based on one year of data collected. There has been a recent change in methodology such that time periods before 2016-17 are not comparable to those after 2016-17.

### High School UC/CSU-Readiness

Data for the 2021-22 academic year are the latest data available as provided by the [California Department of Education](#). The methodology used is based on the number of students that graduate and also complete the so-called A through G requirements to qualify for California State University or University of California admission upon graduation. There has been a recent change in methodology such that time periods before 2016-17 are not comparable to those after 2016-17.

### Home Prices and Housing Affordability

Data were provided by [Zillow™ Research](#) for median home prices and forecasts as of April 2023. California Association of REALTORS® calculates a housing affordability index (HAI) published quarterly at [www.car.org](#). Rental price data are also from [Zillow™ Research](#).

### Labor Force Participation Rates

This is a ratio of the population over 18 years old and younger than 65 that is employed or actively seeking work. Data shown in this Index 2022 are a combination of population data from the [Census Bureau](#) and [California EDD](#) as described above. The authors make the calculation from data available as of April 2023.

### Broadband and Computer Access

The Census Bureau, in its [American Community Survey](#), is now tracking the number of households with a computer or with broadband access of both. These data are shown here as a way to consider Solano County versus the state and nation and the ability to use tools at home to increase labor supply readiness and online learning opportunities. The latest data are from 2021 (one-year), and were made available in December 2022.

### Building Permits

Building permits data are available from both the County of Solano and the Census Bureau at the metropolitan statistical area (MSA) level. The County of Solano provided both residential permit counts and square footage of new commercial construction permitted through fiscal year 2021-22. The Census Bureau building permits database can be found at: <http://www.census.gov/construction/bps/>. The latest data are through 2022 as of May 2023.

### City Data: Economics and Demographics

Data on the cities and their demographics come from the [American Community Survey](#) (ACS) of the Census Bureau through 2021 (the latest data available as of April 2023). While this survey has some data limitations for smaller municipalities and the unincorporated portions of counties, it is the best, current source of information on cities and towns between the ten-year Census dates. Data shown in this Index edition are five-year averages (2017-21 is the latest five-year average available).

### Commuting Data and Time to Work

Data on commuting workers come from the Census Bureau to 2020 ([American Community Survey](#)) and also its partnership with the Bureau of Labor Statistics and the QWI called the [Longitudinal Employer-Household Dynamics](#) (LEHD) database. Data are annual and available from 2002 to 2020 as of May 2023.

The 2022 Solano County Index of Economic and  
Community Progress can be found at:

**[www.solanocounty.com/economicindex](http://www.solanocounty.com/economicindex)**

**Economic Forensics and Analytics**

Robert Eyler, PhD, President

PO Box 750641, Petaluma, CA 94975

(707) 318-0348 ♦ [eyler@econforensics.com](mailto:eyler@econforensics.com)

[www.econforensics.com](http://www.econforensics.com)

**County of Solano**

Matthew A. Davis, Senior Management Analyst / Public Communications Officer

675 Texas Street, Suite 6500, Fairfield, CA 94533

(707) 784-6100 ♦ [madavis@solanocounty.com](mailto:madavis@solanocounty.com)

[www.solanocounty.com](http://www.solanocounty.com)

**Solano County Economic Development Corporation**

Chris Rico, President

360 Campus Lane, Suite 102, Fairfield, CA 94534

(707) 784-1855 ♦ [chris@solanoedc.org](mailto:chris@solanoedc.org)