

Marin County Comprehensive Economic Development Strategy (CEDS)

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Produced by

Marin Economic Forum

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EXECUTIVE SUMMARY

This Comprehensive Economic Development Study (CEDS) provides Marin County with a strategy for economic and social evolution. This study represents combined efforts of community volunteers and Marin Economic Forum staff to examine regional economic development. Staff collected input from businesses and community stakeholders through focus-group events and meetings involving more than 100 community leaders. Funding for the CEDS was provided by Marin Community Foundation, Employment Training Board of the Workforce Opportunity and Investment Act (WIOA), and Union Bank as a corporate sponsor.

A common theme in this report is recognizing how Marin County's economy, from its labor markets to housing to transportation to tourists, is tied to the North Bay and Bay Area regional economies. A large amount of historic and current data is used here to describe Marin County's business, people and regional connections and comparisons. Also, this plan points to needs that will enhance Marin County's economic and social resiliency in terms of warding off both recession and growing social issues in terms of income inequality and a lack of inclusion in wealth, health and educational resources.

There are seven main ideas that this report identifies as strategic goals for Marin County:

- Support and Grow Jobs and Businesses in Targeted Industries;
- Wireless Access and Broadband Expansion;
- Expansion of Tourism in a Sustainable Way for Marin County's communities;
- Preservation of Natural Resources and Open Space;
- Education and Workforce Development Enhancement;
- Housing and Transportation Planning and Connections; and
- Supporting and Expanding Marin County's Social Safety Net.

Marin County has a dichotomous economy, one tied to the greater Bay Area (mainly San Francisco and Oakland) but also connected to counties north of San Francisco for labor, housing, goods, and services. Regional transportation options, water systems and other infrastructure are shared regionally. Education and workforce development are also regionally linked; the California counties of Sonoma, Napa, Marin, Alameda, Contra Costa, San Francisco, Solano, and San Mateo use each other's colleges, universities and workforce development resources to assist regional workers. Marin County's commercial real estate options are diverse and in a competitive, regional market for tenants. Residential housing provides shelter for both Marin County residents and many businesses. Marin County also has a large number of acres defined as open space, providing dedicated places to enjoy Marin County's aesthetics and where agriculture and outdoor activities can take place in perpetuity.

This CEDS report identified some tradeoffs for Marin County based on geography, employment levels, income levels, and demography include the following challenges to balancing between economic growth and social equity when considering an expansion of physical and virtual infrastructure:

- Relatively high homeownership and rental prices;
- Rising levels of traffic, mainly in a southern direction in the morning, and northern direction at night;
- A rising spread between high-income residents and lower-wage workers;
- Rising demand for public and private health systems based on an aging demography and recent regulatory changes;
- Major competition to the north, east and south for tourism revenues; and
- A large amount of dedicated open space that restricts commercial and residential real estate growth to vertical, implying more density to support a growing population.

This report declares an updated set of targeted industries for Marin County. This new set was determined by how Marin County industries are growing, both locally and regionally, how export-focused specific industries are, and how economic and workforce development efforts are set up regionally to help foster growth for some industries over others. Some industries are naturally pulled behind growing industries; others tend to pull the economy behind their growth based on global markets for their products.

1. Recent growth of employment in Marin County;
2. Recent growth of employment in the Bay Area overall;
3. A "shift share" analysis that compares Marin County to California overall and signals any local comparative advantage over time;
4. The number of "base" jobs in an industry (employers that seek markets beyond Marin County for their products and services) versus locally-serving jobs that service Marin County's residents as a marketplace;
5. The "multiplier" effects on employment and revenue by industry; and then two questions:
6. Are efforts underway to expand the number of employers and jobs for this industry?; and
7. Does infrastructure and community support exist for this industry's growth?.

The industry list below is based on weighting these factors.

Targeted Industries 2015-2020, Marin County					
Sector	Agriculture	Specialty Manufacturing	Research and Design	Wellness	Education
<i>Industries</i>	Support Services	Food and Beverage	Life Sciences	Tourism Support	Non-profits focused on education
		Apparel	Environmental Sciences	Outpatient health care	Colleges and Universities
	Logistics	Personal Goods	Mobile Technology	Residential Care (links to construction)	

This report is a comprehensive look at Marin County, its regional economic role, its links in terms of infrastructure networks, its economy, its demography, and its social and environmental challenges given the above. Below is a list of measurable outcomes that, if achieved, the economic and social resiliency of Marin County's communities will be augmented.

- Grow jobs in the sum of the targeted industries by 5 percent per year, and outpace average employment growth;

- Expand broadband and wireless access to reach 10 percent more households per year, with the goal of 99 percent of all county households and businesses by 2020;
- Reduce the number of households in poverty, specifically those under 100 percent of the poverty line, by 5 percent per year through 2020;
- Increase tourism revenue for Marin County overall by 10 percent per year, with a focus on overnight stays rising at 15 percent per year to drive the broader multiplier effects of more local tourism;
- Develop a strategic plan for community resiliency in West Marin around an expansion of tourism, specifically overnight stays, with infrastructure expansion and environmental balance with the residents and local agricultural businesses;
- Establish an energy and water management plan for the county as linked to regional efforts by 2022;
- Reduce aggregate commute times by 5 percent per year by marketing and utilizing expanding and current transit infrastructure; and
- Augment the social safety net in three ways through 2020:
 1. Increase availability of low-cost child care by 5 percent per year in terms of capacity;
 2. Increase senior adult job training programs by 2 percent per year; and
 3. Increase opportunities for low-income housing by augmenting total units available by 1 percent per year.

BACKGROUND

1. What is the CEDS?

This Comprehensive Economic Development Strategy (CEDS) is the culmination of efforts by Marin Economic Forum (MEF), from January 2014 to April 2015, to examine Marin County's businesses and communities. This study is meant to provide guidance concerning infrastructure needs, workforce evolution, and support needed for Marin County's economy. Included here is an updating of potential targeted industries, focal business sectors for countywide economic development efforts. Infrastructure needs will be focused on supporting these targeted industries.

To provide a bit more background on the CEDS report's importance, the Economic Development Administration (EDA), a division of the United States Department of Commerce, states:

A CEDS is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. The CEDS should analyze the regional economy and serve as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources. A CEDS integrates a region's human and physical capital planning in the service of economic development. Integrated economic development planning provides the flexibility to adapt to global economic conditions and fully utilize the region's unique advantages to maximize economic opportunity for its residents by attracting the private investment that creates jobs for the region's residents. A CEDS must be the result of a continuing economic development planning process developed with broad-based and diverse public and private sector participation, and must set forth the goals and objectives necessary to solve the economic development problems of the region and clearly define the metrics of success. Finally, a CEDS provides a useful benchmark by which a regional economy can evaluate opportunities with other regions in the national economy.¹

This document is intended for use as a reference of economic conditions, development strategies, and projects throughout Marin County. However, this CEDS should not be considered a "stand-alone" document; this report is one tool of many to be used for economic development purposes in Marin County. Volunteers were a core component of advising and assistance on the qualitative aspects of this study.

2. CEDS Strategy Committee

The Board of Directors of Marin Economic Forum (MEF) acted as the strategy-planning committee for this report.² Table 2-1 shows the MEF Board as of March 2015. Between December 2014 to March 2015, the Marin Economic Forum invited community participation in focus-group settings on specific topic areas.

¹See <http://www.eda.gov/ceds/> for more on the CEDS report structure.

²See www.marineconomicforum.org for more information on MEF's activities and the Board of Directors.

This project was funded by the Employment Training Board (ETB) of the Workforce Innovation and Opportunity Act (WIOA), the Marin Community Foundation (MCF), and Union Bank as a corporate sponsor.³ Below is a list of Marin Economic Forum's Board members during the time of this report and their professional affiliations (July 2014 - June 2015).

Table 2 - 1. Marin Economic Forum Board Members, 2014 - 2015

Name	Organization
Mark Abrahams	Autodesk
Rhuenette Alums	AT & T
Judy Arnold	County of Marin
Frank Borodic	West Marin Chamber of Commerce/Roundstone Farms
Gary Bramon	Alders Financial
Linda Davis	Center for Volunteer and Nonprofit Leadership
Alex DiGiorgio	Marin Clean Energy
Mark Essman	Marin County Visitors Bureau
Jacqueline Freeman Christensen	Bank of America Merrill Lynch
Jon Friedenber	Marin General Hospital
Nina Gardner	Filice Insurance/Marin Business Forum
Karen Hawkey	OpusBank
David Hofele	International ProInsurance LLC
Val Hornstein	Hornstein Law Offices
Michael Kadel	Bank of Marin
Patricia Kendall	Kaiser Permanente Medical Center
Jennifer Kim	San Geronimo Golf Course
Steven Kinsey	County of Marin
Adam Krivatsy	Sausalito Business Advisory Committee
Garry Lion	City of Mill Valley / Lion Associates
John Maher	Maher Accountancy
Mitchell Marriott	Union Bank of California
Brigitte Moran	Agricultural Institute of Marin
Craig Nelson	Nelson Family of Companies
Mary O'Mara	Marin Link
Haden Ongaro	Cornish & Carey Commercial
Ralph O'Rear	Buck Institute for Research on Aging
Wade Painter	Redwood Credit Union
Connie Rodgers	San Anselmo Chamber of Commerce
Colin Russell	Russell Architects
Jeff Scharosh	Spinnaker Restaurant/Sausalito Chamber of Commerce
Nanda Schorske	College of Marin
Bill Scott	Marin County Bldg and Construction Trades Council
Coy Smith	Novato Chamber of Commerce
Bill Stewart	Solarcraft
Chris Stewart	City of Novato
Vivien Straus	Straus Family Ranch
Jay Strauss	Winton Strauss Law Group
Harry Thomas	Retired Hennessey Fund
Brent Thomson	Pacific Union /Christies Intl. Real Estate
David Zwicky	Hospice by the Bay

Below is a list of the focus group attendees. An asterisk (*) indicates the attendee is also a MEF Board member.

³Marin Economic Forum would like to thank all those that participated in our focus groups, this report's sponsors, our organizational sponsors and board of directors. Jon Haveman of Marin Economic Consulting provided expertise and analysis to much of this report as a consultant.

Table 2 - 2. Focus Group Attendees, 2014 - 2015

Tom Adams	Denise Lucy
Rhuenette Alums*	Ann Mathieson
Les Aronson	Casey Mazzoni
Chris Bonfiglio	Larry Meredith
Frank Borodic*	Racy Ming
Greg Brockbank	Brigitte Moran*
Louis Brouillet	Jennifer O'Mara
Bill Carney	Cheryl Paddack
Daniel Carney	Peter Pelham
Susan Clark	Peter J. Pratt
Caran Cuneo	Marcia Quinones
Meghan Doran	Nancy Richardson
Katrina Fehring	Lana Scott
Wendy Friefeld	Alison Sexauer
Paul Giampaoli	Rajeev Soorea
Shelley Hamilton	John Starr
Karen Hawkey*	Winscott Stokes
Tim Howard	Mary Kay Sweeney
Linda Jackson	Larry Tackett
Wendy Kalins	Gwyneth Varn
Madeline Kellner	Leonard Weingarten
Boku Kodama	Jane Winter
Myra Levenson	Nolan Zail
Garry Lion*	David Zwicky*

3. CEDS Development Process

The reason why Marin Economic Forum took on this task as a component of strategic planning is based on Marin Economic Forum's mission statement:

The Marin Economic Forum enables Marin County's economic stakeholders to collaborate on improving Marin County's economic vitality, focusing on Marin's targeted industries, while enhancing social equity and protecting the environment.

The quantitative data shown throughout this report, including the targeted industries analyses, were gathered and calculated by MEF staff and consultants. Collecting widespread community opinions was an important part of this process. The framework and timeline for the CEDS development was set and driven by MEF staff. To facilitate public participation and comment in a geographically-diverse area such as Marin County, focus groups came together concerning infrastructure needs that connected to specific industries and community goals. The basic framework of each focus group was:

- Groups invited from community mailing lists, MEF-affiliated working groups, and other community members through social media;
- Groups assembled for 1.5 hours as a strategic planning session;
- Groups split into subgroups for an initial round of comments on questions pertaining to each infrastructure need;
- After each group had a chance to comment on each question, the groups assembled outcomes from the comments;
- The comments were synthesized and posted on MEF's website in a blog format for broader community comment per the geographically-disperse communities; and
- Final comments are published later in the document as qualitative data for strategic planning use.

The six areas were as follows, which were connected to our goals:

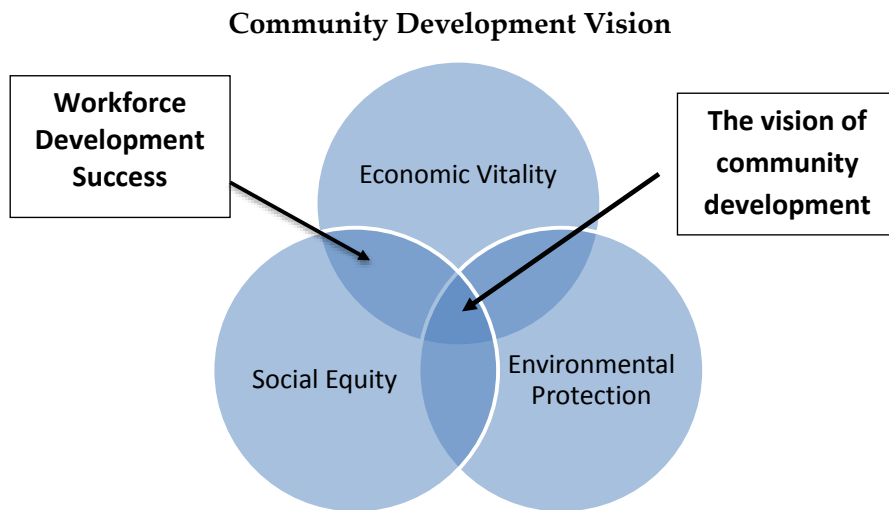
1. Transportation;
2. Housing;
3. Workforce Development and Education;
4. Broadband/Wireless Access;
5. Tourism/Destination Management; and
6. Social Safety Net.

This report begins by providing a profile of Marin County as of 2015, providing regional and national data from 1990 to 2015 as appropriate and available to describe its geography, population, transportation access, and economy. The data exposition are followed by a summary of the economic development strategy, targeted industries, including the CEDS goals, a plan of action, and performance measures, and community opportunities and challenges.

COUNTY PROFILE

A Vision of Community Development

As an introduction to looking at Marin County's economy, it is good to understand the challenges in community development. Marin County is not alone in trying to meet the challenges presented by economic growth (more jobs and businesses) with providing social equity (wages growing across all workers to reduce income inequality) along with supporting the local aesthetic and open space (what is called "environmental balance"). The vision of this CEDS and its plan of action is to support industries that find the intersection of these three ideals of community development.



The importance of this balance will be seen later in the report when workforce training and supporting lower-income workers (where a majority of Marin County's workers are also coming to Marin County from outside the county) is one of many strategies to provide support to those industries identified as "targeted". Skills shortages and workforce training are meant to act as signals and reactions. As we will see throughout this report, Marin County is within a regional area with over seven million residents in the Bay Area, and competition over workers and housing. Filling the needs of local employers is a challenge for workforce training and development. Such "success" helps people transition from homelessness to being homed, from poverty to rising income, and from not building wealth to long-term investment and wealth opportunities.

4. Geography

Marin County is located just north of San Francisco, across the Golden Gate Bridge. It is surrounded on three sides by water. To the west is the Pacific Ocean; to the east are San Francisco and San Pablo Bays, to the south, the city and county of San Francisco. To the north, Marin County shares a border with Sonoma

County. Marin County occupies 828 square miles of space, with 308 of those square miles being water. This makes Marin the fourth-smallest county in California in terms of land area.

Features of the county include an extensive coastline with numerous beaches at the base of open space and hills. Marin County's population of approximately 258,500 people lives mainly along the north-south corridor that follows US Highway 101, running through Marin County from the Golden Gate Bridge in the south to Sonoma County in the north; Marin County is the ninth-smallest county population in California as of 2015. Figure 4-1 shows Marin County's overall geography.

The county can be thought of as three, distinct geographies: West Marin, North Marin and Southern Marin. West Marin is almost completely made up of unincorporated areas, but includes distinct communities such as Stinson Beach, Bolinas, Olema, Point Reyes Station, Inverness, and Tomales. The incorporated town of Fairfax acts as a gateway to West Marin moving west from the city of San Rafael.

North Marin is made up of Novato and San Rafael, as well as neighborhoods such as Terra Linda, Marinwood and Santa Venetia. These areas are home to almost half of Marin County's population.

Southern Marin County is where incorporated cities including Sausalito, Mill Valley, Corte Madera, Larkspur, San Anselmo, Ross, Tiburon, and Belvedere are located. Other communities in southern Marin include Strawberry, Tamalpais Valley, Marin City, Kentfield, and Greenbrae.

The Golden Gate National Recreation Area (GGNRA) is one of the most visited units of the National Park System in the United States, with more than 14.5 million visitors each year. About 3 million come to Marin County's portion of GGNRA. A large portion of West Marin is within the GGNRA.⁴ In all, Marin County has preserved over 185,000 acres of open space outside of these federal lands.

The geography of Marin County provides open space, agricultural possibilities and suburban cities and towns. The population of Marin County is concentrated in the central and southern portions of Marin County, as transportation networks and the proximity to the greater Bay Area would draw.

⁴See <http://www.nps.gov/goga/learn/management/statistics.htm> for more

Figure 4 - 1:
Map of Marin County



Source: Marin County Visitors Bureau (www.visitmarin.org)

5. Population

According to the California Department of Finance's Demographic Research Unit, Marin County's total population was estimated to be 258,324 as of July 2014 (Table 5-1).⁵ Year-over-year growth in the county's population has been, and will likely continue to be slower than in the Bay Area and California overall.⁶ The City of San Rafael, with an estimated population of 58,566, is the largest city in the county and serves as the county seat. Other, larger incorporated cities in the county include Novato (52,967), Mill Valley (14,257), Larkspur (12,102), San Anselmo (12,514), and Sausalito (7,175). There are five (5) other cities and towns; some 67,698 of the county's residents live in unincorporated areas scattered throughout the geography of Marin County outside its cities and towns (see Table 5-2).

Table 5-1. Marin County Population Trends and Projections

Year	Population	Annual % Change		
		Marin	Bay Area	California
1991	233,078	1.39	8.68	2.11
1992	235,668	1.11	7.76	1.74
1993	237,006	0.57	1.34	1.05
1994	237,695	0.29	0.59	0.67
1995	238,409	0.30	0.47	0.60
1996	237,880	-0.22	0.97	0.79
1997	241,350	1.46	1.75	1.53
1998	242,589	0.51	1.46	1.26
1999	244,931	0.97	1.35	1.69
2000	247,424	1.02	1.52	1.74
2001	247,731	0.12	0.82	1.51
2002	247,382	-0.14	0.23	1.23
2003	247,280	-0.04	0.19	1.29
2004	246,684	-0.24	0.16	1.03
2005	246,686	0.00	-0.01	0.65
2006	247,247	0.23	0.46	0.73
2007	248,802	0.63	0.95	0.84
2008	250,288	0.60	1.03	0.83
2009	251,230	0.38	0.72	0.60
2010	252,767	0.61	0.66	0.65
2011	254,282	0.63	0.87	0.70
2012	253,892	-0.15	0.89	0.79
2013	255,778	0.74	1.20	0.78
2014	258,324	1.00	1.12	0.88
		Total % Change from 2014		
2020	259,794	0.57	5.40	5.50
2030	262,615	1.66	14.30	14.40

Source: California Department of Finance, Report P-3.
Calculations by Marin Economic Consulting.

⁵State of California, Department of Finance, *Report P-3: State and County Population Projections by Race/Ethnicity, Detailed Age, and Gender, 2010-2060*. Sacramento, California, December 2014.

⁶The Bay Area, throughout this report, will be the counties of Marin, Contra Costa, Alameda, San Mateo, Santa Clara, San Francisco, Napa, Sonoma, and Napa.

Table 5-2. Regional Population Change by City
(January to January, Thousands of People)

City	2013	2014	% Change		
			Local	Bay Area	California
Marin County	254.7	255.8	0.5	1.2	0.9
San Rafael	58.3	58.6	0.4		
Novato	52.7	53.0	0.5		
Mill Valley	14.2	14.3	0.5		
San Anselmo	12.5	12.5	0.4		
Larkspur	12.1	12.1	0.4		
Corte Madera	9.3	9.4	0.4		
Tiburon	9.1	9.1	0.4		
Fairfax	7.5	7.5	0.3		
Sausalito	7.1	7.2	0.5		
Ross	2.5	2.5	0.3		
Belvedere	2.1	2.1	0.1		
Unincorporated	67.4	67.7	0.5		

Source: California Department of Finance, Report E-1, 2014 Internet Version. Calculations by Marin Economic Consulting.

The County's population is older at the median age than other Bay Area counties and California overall. Local economies seek a balance among resident age groups. Such balance provides a local labor force that utilizes local schools and colleges as places to train and educate, as well as more senior workers and older residents to provide a stable tax base and higher-skilled workers versus a disproportionately younger, more mobile population. Table 5-3 shows the evolution of median age levels in selected Bay Area counties comparing 2013 data to median ages in 2010.

Table 5-3. Median Ages, 2010 and 2013

County or Place	Overall		Male		Female	
	2010	2013	2010	2013	2010	2013
California	35.2	35.7	34.0	34.6	36.3	36.9
Alameda County	36.6	37.1	35.6	36.2	37.5	38.1
Marin County	44.5	45.5	43.0	43.3	46.0	47.3
Napa County	39.7	40.3	38.2	38.8	41.0	41.5
San Francisco	38.5	38.7	38.5	38.8	38.5	38.7
Solano County	36.9	37.2	35.6	35.8	38.2	38.5
Sonoma County	39.9	40.9	38.0	39.5	41.6	42.4

Source: Census Bureau, American Community Survey

Marin County is less diverse in terms of race and ethnicity compared to the rest of California. With 73.2% of the population identified as white alone (versus someone declared as two or more races where "white" is one of the two races), the population is different than other counties in the Bay Area (Table 5-4). The state currently has 40% of its population self-declared as white alone.

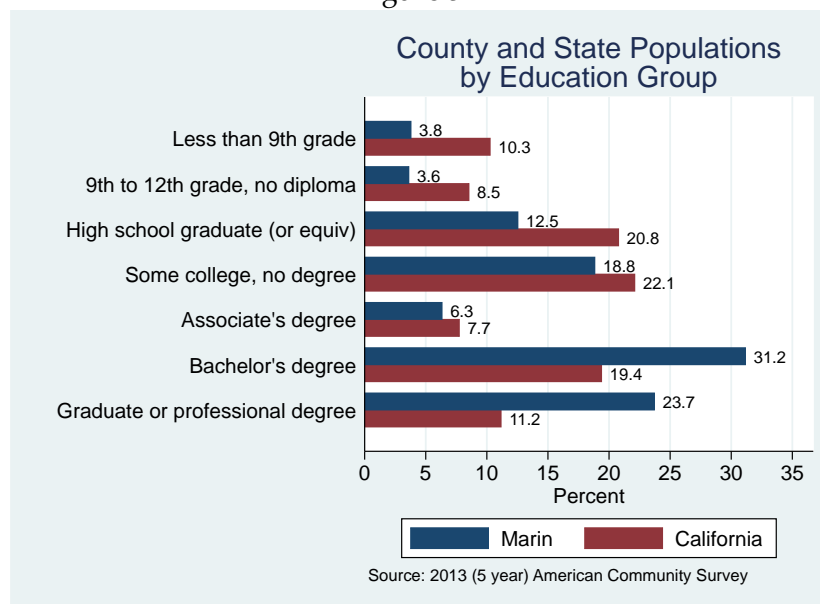
Just 30.6% of the state population has a bachelor's, advanced, or professional degree. In Marin County, the same proportion is 54.9%. This, in part, helps to explain Marin County's relative affluence when combined with the observation that the older population is more likely to be married and have two sources of income and wealth (Table 5-5).

Table 5-4. Race and Ethnicity in Marin County, 2009-2013

Race/Ethnicity	Marin Population	Share of Total Population (%)		
		Marin	Bay Area	California
White, Not Hispanic	184,299	73.2	42.0	40.2
Black, Not Hispanic	6,392	2.5	6.3	5.7
American Indian and Alaska Native, Not Hispanic	468	0.2	0.3	0.4
Asian, Not Hispanic	13,829	5.5	23.6	13.0
Native Hawaiian and Other Pacific Islander, Not Hispanic	437	0.2	0.6	0.3
Some Other Race, Not Hispanic	824	0.3	0.3	0.2
Two or More Races, Not Hispanic	6,998	2.8	3.5	2.6
Hispanic	38,469	15.3	23.6	37.6
Total	251,716	100.0	100.0	100.0

Source: 2013 (5 year) American Community Survey.

Figure 5-1



As regional population growth takes place, transportation systems will become more important in moving residents, workers and tourists throughout the Bay Area region. Marin County resides in the middle of two, major tourism destinations; people from all over the world come to the Bay Area and also travel to the wine-growing regions in Sonoma and Napa counties. Marin County connects these destinations using its transportation access and infrastructure.

Table 5-5. Marital Status by Sex in Marin County, 2009-2013
Population 15 years and over

Marital Status	Male		Female		Total		California
	Number	Percent	Number	Percent	Number	Percent	
Never Married	30,757	30.2	24,816	23.3	55,573	26.7	36.0
Married	56,355	55.4	53,959	50.7	110,314	53.0	47.0
Separated	1,816	1.8	2,143	2.0	3,959	1.9	2.3
Widowed	2,167	2.1	8,906	8.4	11,073	5.3	5.1
Divorced	10,709	10.5	16,596	15.6	27,305	13.1	9.7
Total	101,804	100.0	106,420	100.0	208,224	100.0	100.0

Source: 2013 (5 year) American Community Survey

6. Transportation Access

This section discusses regional infrastructure connecting local residents to their jobs, inbound commuters to jobs in Marin County, and tourists to all parts of Marin County and the entire Bay Area. Transportation infrastructure for local businesses and residents in Marin County is changing, with passenger rail service to begin in 2016. Due to suburban and rural aspects of Marin County cities and towns, and its larger, northern neighbors, traffic is a major political and social issue.

Roadways

US Highway 101 is the primary roadway for automobile and truck traffic through Marin County. US 101 runs through the eastern part of the county; this roadway starts in the south part of the county at the Golden Gate Bridge, and then moves north up through Novato and into Sonoma County. The primary thoroughfare in West Marin is US Highway 1, which largely hugs the coastline and provides access to the shoreline. Petaluma-Point Reyes Road connects Petaluma, CA to West Marin and also acts as a transit way for trucks and workers to Sonoma County. Several county roads provide east-west access, including Sir Francis Drake Boulevard, Fairfax-Bolinas Road, Lucas Valley Road, and Novato Boulevard.

Figure 6-1 Marin's Major Roads



Railways

Passenger rail service in Marin County is due in 2016 with the Sonoma Marin Area Rail Transit (SMART) Phase One completion (See Figure 6-2). SMART is partially financed by a 0.25% sales tax approved by voters in both Marin and Sonoma counties in 2008. SMART will ultimately provide commuter rail service between Cloverdale in northern Sonoma County and the Golden Gate Ferry terminal in Larkspur, California. It will also provide expanded facilities for bicycle and pedestrian travel along its route. A federal grant received in 2015 is likely to provide additional funding to complete the rail line to Larkspur sooner than expected.

SMART is projected to service commuters with 30 minutes between trains and a mid-day train. Weekend service will provide four, round-trip trains each day.⁷

Rail now exists for commercial transport, which may become more important for linking Sonoma County through Marin County for the movement of agriculture, rock, soil, lumber, and other materials. Commercial rail is in use but limited in scale and scope. The opening of passenger rail service is likely to increase the amount of freight using the tracks also, another use of infrastructure to move goods and services in this region.

Figure 6-2 SMART Route



Public Transit

Public transportation in Marin County is largely provided by Marin Transit and Golden Gate Transit. This service consists primarily of standard, local-bus service. There are also a variety of routes providing access to most of the US 101 corridor. Additional services are provided by the West Marin Stagecoach, the Muir Woods Shuttle, Novato Dial-a-Ride, and services tailored to seniors and those with disabilities. The focus of local services is to link specific transportation hubs to regional transportation options. The Golden Gate Bridge Highway and Transportation District (<http://www.goldengate.org>) also provides ferry service from Larkspur and Sausalito into San Francisco.

⁷See SMART Strategic Plan, December 17, 2014:

http://www2.sonomamarintrain.org/userfiles/SMART_2014_StrategicPlan_Final.pdf

15. Connections to the Golden Gate Ferry Services are available from the Golden Gate Transit system (see <http://goldengatetransit.org> for more information and data).

Bikeways

Marin County has a large bicycling community and a local advocacy organization, the Marin County Bicycle Coalition (MCBC). The MCBC is a major force in advocating for the increases use and support of bicycle transportation; promoting safe bicycling for transportation and recreation. Since 1998, MCBC has been steadily improving Marin County's roads, multi-use pathways, and off-road facilities for cyclists and pedestrians. The organization's goal is for 20 percent of all trips in Marin County to be made by bicycling or walking by 2020.

During weekends, the Golden Gate National Recreation Area, the hillsides of Mount Tamalpais, China Camp, and the Point Reyes National Seashore provide venues for biking. On workdays, hundreds of Marin residents bicycle into San Francisco as a part of their commute to work. According to the American Community Survey (factfinder.census.gov), almost 2,000 Marin County residents bike to work daily.

Aviation

The Marin County Airport, also known as Gnoss Field, is the only public airport serving Marin County. It provides service to residents, visitors, businesses, and local government agencies needing personal air transportation. The airport is in Novato and just east of Highway 101 near the county's northern border. The airport is currently home to 300 aircraft and businesses and is open 24 hours a day.

There is no commercial passenger travel other than charter flights from Marin County. Sonoma County airport is 30 miles north of Novato and provides commercial passenger access to Los Angeles International Airport (LAX), San Diego International Airport (SDO), Sea-Tac International Airport (SEA), and Portland International Airport (PDX). Oakland International and San Francisco International (SFO) are within 20 miles of southern Marin County and provide domestic and international flights to all continents. Gnoss Field could provide some intriguing possibilities in terms of more commercial air flights and aviation-based businesses (skydiving, pilot training camps, etc.). The expansion of this airport as a place for transportation and recreational entrepreneur options as part of a targeted industry.

These transportation systems, as in any economy, move people and commerce regionally. The next section looks at Marin County's workers, regional context and industries. As Marin County's economy continues to expand, and more workers and residents come to Marin County, transportation infrastructure will become a focal point for local policy makers. Local public transportation options must evolve to connect more of Marin County's residents to regional transportation options, given the mobility of the county's workforce.

Traffic conditions are a natural opportunity cost of jobs, housing and economic growth, but also need to be considered as a market failure in infrastructure. The county profile shows some of the basic data and overview of infrastructure in Marin County. The next section also looks at Marin County's economy as a way to further set up choosing targeted industries.

7. Economy

Marin County's economy is primarily a services-based economy. According to California Employment Development Department (www.edd.ca.gov), the public sector is approximately 13.3% of the county workforce as of March 2015; for the state overall, this percentage is 15.2% for March 2015. As we will see later, when the targeted industries are discussed, the dichotomy between goods-producing and services-producing industries is an important one. Serving external markets ("exports") can generate more income for each dollar spent, and have a larger multiplier effect than selling locally. Such businesses and industries are competitively sought by economic development professionals because of an industry's "bang-for-buck" or multiplier effect. This report recommends a list of targeted industries based on a set of criteria. Three important themes come from this section:

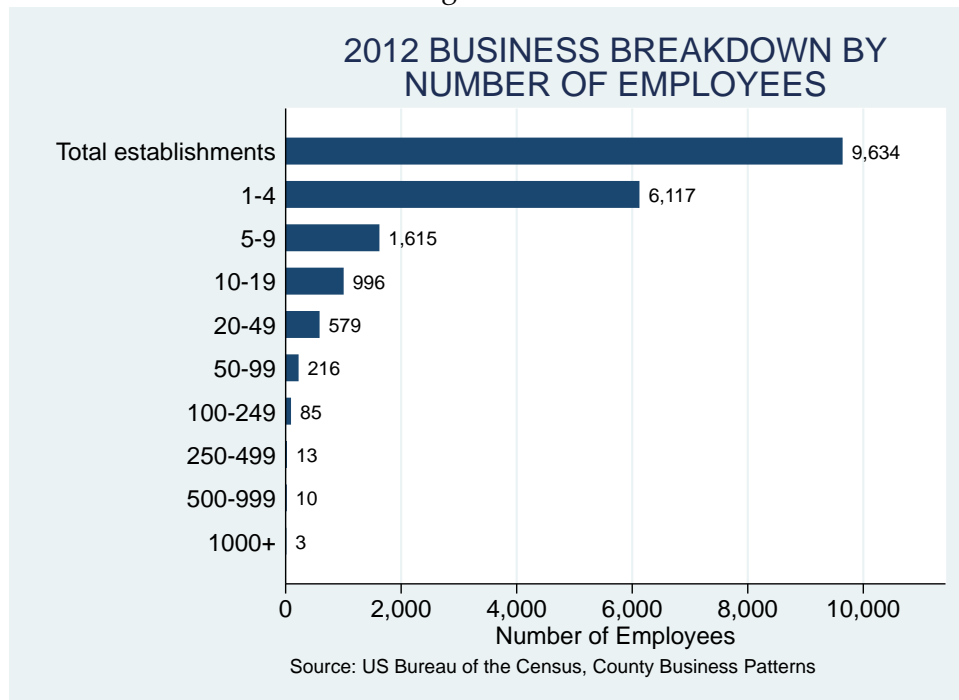
1. Marin County is a small county in a large regional economy in terms of population;
2. Marin County has a two-part economy in terms of those that work outside Marin County and live locally versus inbound commuters;
3. Marin County has roughly the same personal income level as its northern neighbor, Sonoma County, with approximately one-half the population base; and
4. Marin County has a highly-educated, high-income, residential population with local workers earning substantially less on average.

We will start by examining Marin County's economic base, or jobs focused mainly on exportation from Marin County to other parts of the global economy.

Economic Base

A fast-growing segment of Marin's economy is scientific, research, and development businesses. These companies engage in developing new products. Many of these establishments have less than 10 employees. Some local businesses are larger, including: BioMarin (www.brmm.com); Ultragenyx (www.ultragenyx.com); and Raptor Pharmaceutical (www.raptorpharma.com). The Buck Institute for Aging Research is similar to a large biology department of a major research university, with links to the University of California, San Francisco and the University of Southern California. Marin County is building a cluster for biotechnology and pharmaceutical research and development.

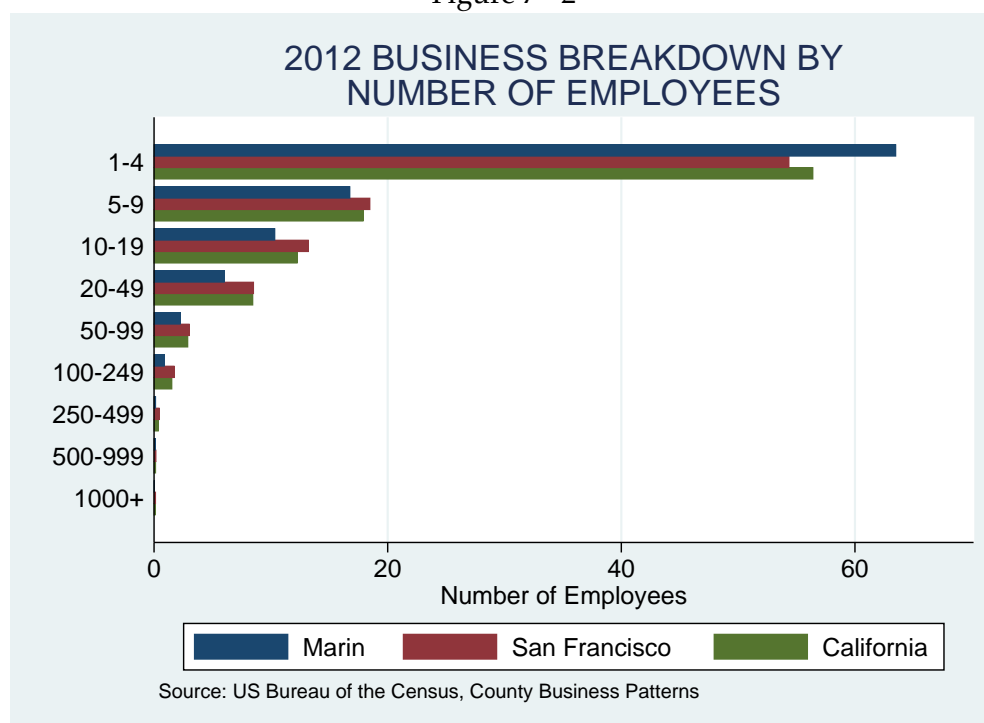
Figure 7 - 1



In California overall, business establishments with between 1 and 4 employees, including the proprietor, account for just 56.4% of all establishments, whereas in Marin County, they account for 64%. There were 6,117 such establishments in 2012 (Figure 7 - 1). In general, the proportion of the county's labor force that is self employed is significantly higher than elsewhere in the United States. Establishments with 20 or fewer employees make up over 90% of Marin's establishments, as compared to just 86% statewide (Figure 7 - 2).

Let's look at more details about Marin County's labor markets and compare them to regional labor markets and beyond.

Figure 7 - 2



Employment and Unemployment

As of December 2014, Marin County had a labor force of 146,300 people (Table 7-1). These are residents of Marin County that may be working in Marin County or elsewhere. Of those, 140,800 were employed. That leaves nearly 5,400 residents unemployed who are seeking work, implying an unemployment rate of 3.8 percent. Unemployment in Marin County is low relative to the Bay Area as a whole (5.2 percent), California (7.3 percent), and the broader United States (5.9 percent). County unemployment is down nearly a full percentage point between December 2013 and December 2014 (Figure 7-3). Marin's unemployment rate is generally very low and below that of the Bay Area otherwise. Marin County experienced unemployment rates of close to 2 percent in the late 1990s.

Table 7 - 1: Marin County Jobs: Residents Employed and Unemployed (SA)

	Dec Non-Farm Payroll	3-Mon Chg.		6-Mon Chg.		Year Chg.	
		Chg.	percent	Chg.	percent	Chg.	percent
December 2014							
Labor Force	146,264.8	875.6	0.6	2,836.6	2.0	3,919.8	2.8
# Employed	140,775.6	1,120.2	0.8	2,927.4	2.1	4,909.5	3.6
# Unemployed	5,420.8	-268.5	-4.7	-113.5	-2.1	-1,099.4	-16.9
		<i>Level</i>	<i>Chg.</i>	<i>Level</i>	<i>Chg.</i>	<i>Level</i>	<i>Chg.</i>
Unemployment Rate %	3.8	4.0	-0.1	3.8	0.0	4.6	-0.8

Source: California EDD

Figure 7-4 compares the number of employed workers beyond farm jobs in Marin County, the Bay Area otherwise and California as a whole, using an index that begins in 1990 to normalize the data.

Figure 7 - 3

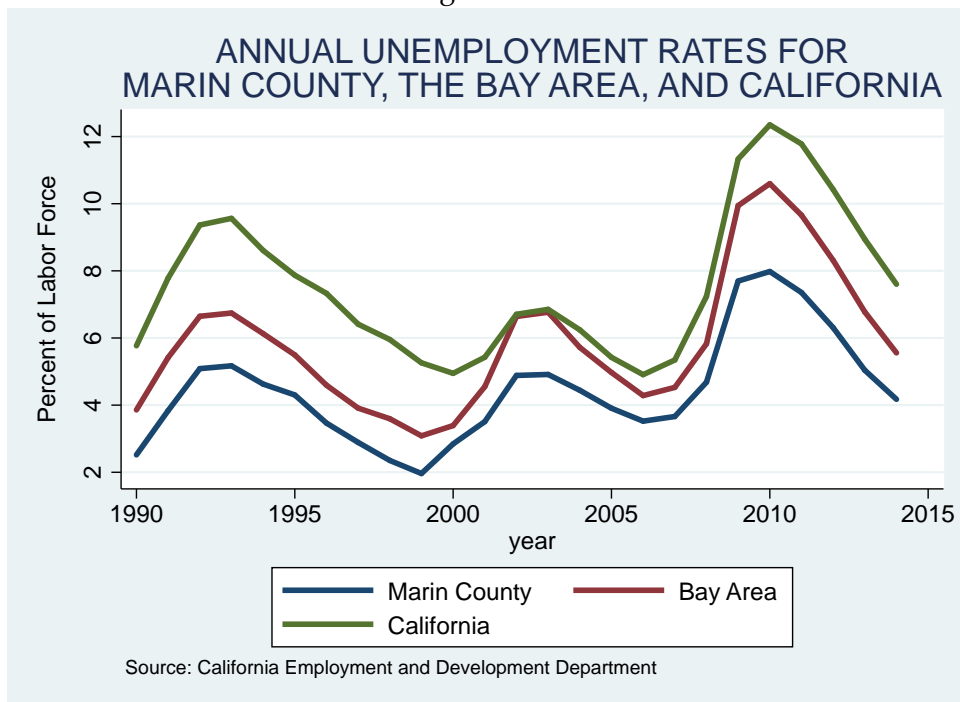
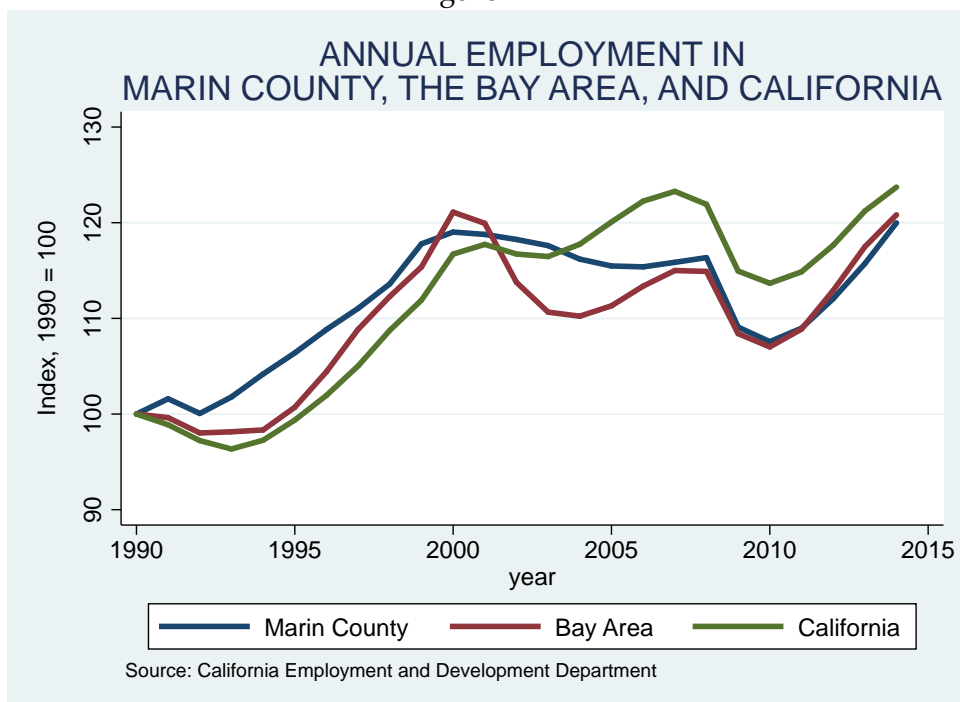


Figure 7 - 4



During 2014, the fastest growing sectors of the economy, in terms of employment, were the information sector, professional and business services, health care, and leisure and hospitality (Table 7 - 2). Health care employment has grown quickly in the Bay Area and California since 2010; professional and business services and leisure and hospitality have been growing rapidly around the Bay Area specifically.

Table 7 - 2: Marin County Employment Growth By Industry in 2014 (Thousands, SA)

December 2014	Dec Non-Farm	3-Mon Chg.		6-Mon Chg.		Year Chg.	
	Payroll	Chg.	percent	Chg.	percent	Chg.	percent
Farm	0.4	-0.0	-1.2	-0.0	-1.5	0.0	0.2
Total Nonfarm	115.6	1.1	0.9	2.5	2.2	4.1	3.7
Goods Producing	8.6	0.1	1.0	0.3	3.8	0.4	4.6
Manufacturing	2.4	0.1	3.3	0.1	5.0	0.1	3.5
Durable Goods	1.0	0.0	4.0	0.1	5.9	0.0	3.9
Non-Durable Goods	1.4	0.0	2.0	0.1	3.9	0.0	3.2
Service-Providing	107.0	1.0	0.9	2.3	2.2	3.7	3.6
Trade Transport Util.	18.0	-0.1	-0.5	0.0	0.1	0.2	1.2
Wholesale Trade	2.7	-0.0	-0.6	-0.0	-1.3	0.0	0.4
Retail Trade	14.1	-0.0	-0.2	0.1	0.8	0.2	1.1
Transport Warehouse Util.	1.2	-0.0	-1.3	-0.0	-0.7	0.0	2.0
Information	3.1	0.0	1.4	0.1	3.0	0.2	6.5
Fin. Activities	7.1	-0.1	-1.4	-0.1	-1.7	-0.1	-1.3
Finance and Ins.	5.0	0.0	0.0	0.0	0.2	-0.0	-0.5
Real Estate	2.1	-0.1	-4.1	-0.1	-5.4	-0.1	-3.1
Professional/Business	21.2	0.6	3.1	1.1	5.4	1.5	7.6
Prof Sci and Tech	11.4	0.5	4.2	0.7	6.5	0.9	9.0
Management	2.4	0.0	1.2	0.0	2.0	0.1	3.7
Admin Support	7.3	0.1	1.6	0.4	5.1	0.4	5.9
Education/Health	20.3	-0.1	-0.2	0.2	0.9	0.4	2.2
Educ. Services	4.4	-0.0	-0.4	-0.0	-0.5	-0.1	-1.7
Health Care	15.8	-0.0	-0.3	0.1	0.9	0.5	3.3
Leisure and Hosp.	15.8	0.4	2.3	0.4	2.3	0.7	4.5
Other Services	5.6	0.2	2.9	0.2	4.7	0.2	4.1
Government	15.7	0.0	0.1	0.2	1.1	0.2	1.2
Fed Gov	0.7	-0.0	-0.1	-0.0	-0.1	-0.0	-0.6
State Gov	1.8	-0.0	-0.1	0.0	1.2	0.0	1.1
Local Gov	13.2	0.0	0.2	0.2	1.2	0.2	1.6

Source: California EDD, Calculations and Seasonal Adjustment by MEC

By occupational category, Marin County is highly concentrated. Management, sales and related occupations, healthcare, and education occupations in Marin County have higher shares of the local workforce than the rest of the Bay Area and state (Table 7 - 3).

The educational attainment of Marin County's residents ("labor force" in Figure 7-7) reflects relatively higher income levels. Compared to both the Bay Area as a whole and the state, Marin County has a higher proportion of its workforce with higher levels of educational attainment (Table 7-4). In nearly all categories above Associate's Degree, Marin County has a higher proportion of its labor force represented. The county population is also older at all levels of education above high school graduates (Table 7 - 7). Based on higher age and experience levels in Marin County, earnings at most levels of education are higher in Marin County than either the rest of the Bay Area or the state as a whole (Table 7 - 8).

Table 7 - 3: Occupation Distribution of Employment, percent Shares

Occupation	Marin County	Bay Area	California	Difference Relative to:	
				Bay Area	California
Management, Business, and Financial	23.4	18.5	14.9	4.9	8.5
Computer, Engineering, and Science	6.4	10.5	6.1	-4.1	0.3
Education	6.5	5.3	5.5	1.2	0.9
Legal, Community Service, Arts, and Media	9.4	5.8	5.4	3.6	4.0
Healthcare Practitioners and Technicians	6.5	4.9	4.7	1.6	1.8
Healthcare Support	1.3	1.9	2.0	-0.7	-0.7
Protective Service	0.9	1.7	2.2	-0.8	-1.3
Food Preparation and Service	3.9	5.0	5.3	-1.1	-1.4
Building and Grounds Cleaning and Maintenance	4.1	4.1	4.5	0.0	-0.4
Personal Care and Service	4.4	4.2	4.4	0.3	0.0
Sales and Related	12.4	10.8	11.3	1.6	1.0
Office and Administrative Support	9.7	12.1	13.4	-2.5	-3.7
Farming, Fishing, and Forestry	0.4	0.5	1.6	-0.1	-1.2
Construction and Extraction	4.7	4.2	4.8	0.5	-0.1
Installation, Maintenance, and Repair	1.8	2.4	3.0	-0.5	-1.1
Production	2.3	4.0	5.3	-1.7	-2.9
Transportation and Material Moving	1.9	4.2	5.6	-2.3	-3.7

Source: 2013 5yr American Community Survey, Calculations by Marin Economic Consulting

Table 7 - 4: Educational Attainment, percent Shares

Education	Marin County	Bay Area	California	Difference Relative to:	
				Bay Area	California
Less than High School	7.4	12.8	18.8	-5.4	-11.4
High School Graduate	12.5	17.6	20.8	-5.0	-8.2
Some College, but less than 1 year	4.0	4.9	5.8	-0.9	-1.7
One or more years of college, No Degree	14.8	14.8	16.3	0.0	-1.6
Associate's Degree	6.3	7.3	7.7	-1.0	-1.4
Bachelor's Degree	31.2	25.5	19.4	5.7	11.8
Master's Degree	14.6	11.6	7.4	3.0	7.1
Professional Degree	6.0	3.1	2.3	2.9	3.7
Doctoral Degree	3.2	2.4	1.5	0.7	1.7
All Education Levels	100.0	100.0	100.0	0.0	0.0

Source: 2013 5yr American Community Survey, Calculations by Marin Economic Consulting

Table 7 - 5: Average Age by Educational Attainment

Education	Marin County	Bay Area	California	Difference Relative to:	
				Bay Area	California
Less than High School	47.0	52.5	50.8	-5.5	-3.8
High School Graduate	53.8	51.2	49.8	2.6	4.0
Some College, but less than 1 year	54.1	51.0	50.1	3.1	4.0
One or more years of college, No Degree	54.0	49.0	48.0	5.0	6.0
Associate's Degree	54.1	49.4	48.8	4.7	5.3
Bachelor's Degree	52.1	46.9	47.2	5.2	4.9
Master's Degree	54.3	48.1	49.6	6.2	4.7
Professional Degree	57.0	50.9	51.3	6.1	5.7
Doctoral Degree	56.7	51.2	53.0	5.5	3.7
Total	53.2	49.4	49.2	3.8	4.0

Source: 2013 5yr American Community Survey, Calculations by Marin Economic Consulting

Table 7 - 6: Median Earnings by Educational Attainment

Education	Marin County	Bay Area	California	Difference Relative to:	
				Bay Area	California
Less than High School	23,489	26,692	23,225	-3,203	264
Some High School	24,316	29,927	26,692	-5,611	-2,376
High School Graduate	42,707	39,244	36,301	3,463	6,406
Some College, No Degree	56,113	51,232	45,965	4,881	10,148
Associate's Degree	59,997	56,113	51,232	3,884	8,765
Bachelor's Degree	92,898	77,941	67,738	14,957	25,160
Master's Degree	104,205	102,464	86,837	1,741	17,368
Professional Degree	154,830	122,957	108,547	31,873	46,283
Doctoral Degree	112,227	116,123	103,119	-3,896	9,108
Total	77,415	62,900	48,846	14,515	28,569

Source: 2013 5yr American Community Survey, Calculations by Marin Economic Consulting

Throughout the Bay Area, there is a distinction between a county's labor force and workforce due to inter-county flows of workers. The labor force is the set of county residents that are either employed or actively looking for work while unemployed. Non-farm employment (see Table 7-3) is the set of people that work at non-agricultural jobs in Marin County, regardless of where they might live. For Marin County, both groups are split nearly in half as to whether or not they work and live in the same county. Of Marin's labor force, 71.0 percent of workers who live in the county also work in Marin.

Table 7 - 7: Marin County Worker Mobility, Across Counties

County	County of Employment		County of Residence	
	Number	Percent	Number	Percent
Marin	43,502	71.0	43,502	54.5
Alameda	1,928	3.1	3,285	4.1
Contra Costa	927	1.5	6,195	7.8
Napa	419	0.7	815	1.0
San Francisco	10,736	17.5	6,024	7.6
San Mateo	1,018	1.7	691	0.9
Santa Clara	412	0.7	405	0.5
Solano	292	0.5	4,003	5.0
Sonoma	1,632	2.7	13,054	16.4
Out of Bay Area	392	0.6	1,813	2.3
Total	61,258		79,787	

Source: 2013 (5 year) American Community Survey,
Calculations by Marin Economic Consulting

The composition of these workers commuting in the two directions is very different (Table 7 - 8). The 2013 American Community Survey (ACS 2013) suggests that of those commuting into Marin to work, 27.3 percent have a high school diploma or less. The comparable figure for those commuting out of Marin County is just 8.2 percent. Nearly three-quarters of those commuting out (live in Marin, work elsewhere) have a bachelor's degree or higher while the same figure for those commuting in (work in Marin, live elsewhere) is just 37.9 percent. For those who both live and work in Marin, there is a high proportion without a high school diploma, than for either of the other groups, but a higher proportion have a bachelor's degree than those commuting into Marin, 47.1 percent as opposed to 37.9 percent.

Table 7 - 8. Educational Distribution by Worker Mobility

Earnings	Live in Marin Work Elsewhere		Work in Marin Live Elsewhere		Live and Work in Marin	
	Number	Percent	Number	Percent	Number	Percent
Less than High School	878	5.1	1,931	10.1	2,135	7.1
High School Graduate	1,106	6.4	3,038	15.9	3,386	11.3
Some College, but less than 1 year	632	3.7	948	4.9	1,298	4.3
One or more years of college, No Degree	1,712	9.9	3,508	18.3	5,304	17.6
Associate's Degree	615	3.6	1,713	8.9	1,722	5.7
Bachelor's Degree	6,540	37.8	5,419	28.3	9,784	32.5
Master's Degree	3,164	18.3	1,682	8.8	3,865	12.8
Professional Degree	1,860	10.8	661	3.4	1,515	5.0
Doctoral Degree	794	4.6	261	1.4	1,088	3.6
Total	17,301	100.0	19,161	100.0	30,097	100.0

Source: 2013 (5 year) American Community Survey

These differences are reflected in worker earnings. Table 7 - 9 provides the earnings distributions of each group. The quintile cutoffs are determined by using the combined workforce and labor force of Marin County. The idea is to provide five groups for comparison. Each quintile represents some amount of income; notice the final column to the right is a dollar amount, or where the quintile "bound" is. For example, for those living in Marin and working elsewhere, the bottom group is 1,746 workers, which is 9.7 percent of those that live in Marin County and work elsewhere, and they make no more than \$18,386 per year. The top group has an estimated 7,092 people in it, making over \$101,004 per year at least.

Each worker of the three groups is assigned to a quintile based on these cutoffs. Those commuting out of the county are highly likely to be in the top quintile of the group; those commuting in and those living and working in Marin County have distributions that are skewed towards the distribution's lower wage levels.

The primary takeaway from this analysis is that there is a installed base of skilled workers in Marin County that each day leave the county in order to work at higher income levels; this base is a large proportion of Marin County's available labor force, hence low unemployment rates and high household-income levels.

Table 7 - 9: Earnings Distribution by Worker Mobility, Marin County

Educational Attainment	Live in Marin Work Elsewhere		Work in Marin Live Elsewhere		Live and Work in Marin		Quintile Upper Bound (\$)
	Number	Percent	Number	Percent	Number	Percent	
Bottom Quintile	1,746	9.7	3,193	16.7	9,163	28.0	18,386
Second Quintile	2,079	11.6	4,565	23.8	7,388	22.5	36,772
Third Quintile	2,904	16.2	5,181	27.0	6,151	18.8	60,790
Fourth Quintile	4,110	22.9	4,125	21.5	5,328	16.3	101,004
Top Quintile	7,092	39.6	2,097	10.9	4,745	14.5	

Source: 2013 (5 year) American Community Survey

The next section looks more deeply at incomes and wages, and also considers poverty levels in Marin County. Poverty levels affect the demand for social safety-net infrastructure in Marin County, but are also reflective of residents' high incomes. Growth of jobs does not necessarily mean wages are going to grow

locally, as residential employment may rise while local employers struggle to find workers due to labor markets being regional. We next look more deeply at wages and jobs.

Wages and Jobs

This section compares inflation-adjusted wages in certain industry sectors and industries over time. Communities normally seek industries that provide a wide spread of jobs and wage opportunities. Marin County has a diversified economy, from agriculture to professional and personal services. The growth of wages in real terms, where inflation have been removed from the wage data, allows us to look at the purchasing power of local wage income. One concern for Marin County is that housing costs, rental or ownership, have increased faster than wages in real terms. The recession of 2008-10 remains in the form of slow wage growth. The following table showcases this slow growth in real wages since 2005, as compared to the 1990-2005 period.

Table 7 - 10: Real Annual Wages, Marin County, Industry Sectors, 1990-2014, 1990 Dollars

Industry	1990	1995	2000	2005	2010	2013	2014Q2
Total	\$ 25,847	\$ 27,510	\$ 31,413	\$ 34,936	\$ 32,764	\$ 32,077	\$ 32,291
Agriculture, Forestry, Fishing	\$ 14,117	\$ 14,509	\$ 15,925	\$ 19,326	\$ 16,814	\$ 18,370	\$ 17,761
Construction	\$ 30,279	\$ 29,330	\$ 31,960	\$ 31,292	\$ 35,423	\$ 33,840	\$ 32,486
Wholesale Trade	\$ 35,262	\$ 37,188	\$ 40,865	\$ 42,733	\$ 42,148	\$ 42,997	\$ 48,088
Information	\$ 32,187	\$ 41,225	\$ 62,640	\$ 63,793	\$ 42,132	\$ 51,187	\$ 65,083
Finance and Insurance	\$ 40,631	\$ 46,475	\$ 56,830	\$ 77,310	\$ 65,197	\$ 66,514	\$ 59,650
Real Estate and Rental and Leasing	\$ 21,119	\$ 25,410	\$ 26,770	\$ 30,871	\$ 33,377	\$ 33,442	\$ 33,015
Professional and Technical Services	\$ 36,615	\$ 41,897	\$ 50,924	\$ 54,793	\$ 55,867	\$ 58,040	\$ 48,339
Administrative and Waste Services	\$ 20,604	\$ 23,149	\$ 23,481	\$ 25,606	\$ 25,738	\$ 25,394	\$ 24,267
Educational Services	\$ 21,768	\$ 22,289	\$ 23,543	\$ 24,617	\$ 26,860	\$ 26,759	\$ 25,158
Health Care and Social Assistance	\$ 24,145	\$ 25,886	\$ 25,833	\$ 32,791	\$ 33,611	\$ 28,977	\$ 27,192
Arts, Entertainment, and Recreation	\$ 30,228	\$ 22,821	\$ 20,713	\$ 21,354	\$ 22,277	\$ 18,313	\$ 16,967
Hotels and Restaurants	\$ 10,660	\$ 10,656	\$ 11,553	\$ 11,806	\$ 12,077	\$ 12,228	\$ 12,342
Other Personal Services (incl. Nonprofits)	\$ 19,193	\$ 19,935	\$ 19,777	\$ 20,396	\$ 20,156	\$ 19,764	\$ 19,391
Manufacturing	\$ 26,856	\$ 24,633	\$ 21,721	\$ 20,154	\$ 19,268	\$ 31,793	\$ 52,852
Retail	\$ 28,199	\$ 17,678	\$ 15,304	\$ 13,635	\$ 12,565	\$ 20,105	\$ 20,784
Transport and Logistics	\$ 25,449	\$ 19,624	\$ 18,158	\$ 15,194	\$ 13,305	\$ 23,713	\$ 26,194

Source: California EDD, 2014

Slow wage growth implies pressure on lower-wage workers to keep their purchasing power growing. Costs of health care, transportation, housing, child care, and food all contribute to rising household needs. The next table shows the wage distribution for specific occupations. There is a subtle difference between occupational and industry data. Industry data looks at employers and their demand for any type of worker, where occupational data looks at how specific types of workers are demanded by firms. Occupations may stretch across industries or be industry-specific. Comparing 2006 to 2014 in this table shows how wide the wages are for annual wages and change over time. Blank entries suggest that those jobs no longer have wages paid, and only pay salaries beyond the last wage level shown.

Table 7 - 11: Real Annual Wages, Marin County, Occupations, 2006 and 2014, Current Dollars

Year-Occupation	Average Wage	10th % Wage	25th % Wage	Median Wage	75th % Wage	90th % Wage
2006						
Architecture and Engineering	\$ 39,421	\$ 23,003	\$ 28,535	\$ 36,896	\$ 47,811	\$ 59,898
Arts, Design, Entertainment, Sports, and Media	\$ 30,607	\$ 11,801	\$ 18,520	\$ 27,179	\$ 38,323	\$ 53,035
Building, Grounds, and Maintenance	\$ 14,101	\$ 8,542	\$ 10,101	\$ 13,231	\$ 16,976	\$ 21,148
Business and Financial Operations	\$ 36,058	\$ 18,890	\$ 24,619	\$ 32,639	\$ 43,308	\$ 57,210
Community and Social Services	\$ 22,729	\$ 12,322	\$ 15,347	\$ 20,413	\$ 29,857	\$ 37,115
Computer and Mathematical	\$ 44,024	\$ 24,713	\$ 33,010	\$ 43,044	\$ 54,132	\$ 65,625
Education, Training, and Library	\$ 26,859	\$ 12,798	\$ 17,148	\$ 24,527	\$ 34,157	\$ 44,520
Farming, Fishing, and Forestry	\$ 13,385	\$ 8,054	\$ 9,039	\$ 11,550	\$ 13,796	\$ 22,890
Food Preparation and Serving Related	\$ 11,043	\$ 7,823	\$ 8,587	\$ 10,031	\$ 11,946	\$ 16,367
Healthcare Practitioners and Technical	\$ 39,220	\$ 19,684	\$ 26,901	\$ 36,531	\$ 47,660	\$ 59,058
Healthcare Support	\$ 16,565	\$ 9,901	\$ 12,003	\$ 15,461	\$ 20,602	\$ 25,750
Installation, Maintenance, and Repair	\$ 25,667	\$ 13,698	\$ 18,454	\$ 25,797	\$ 32,657	\$ 36,932
Legal	\$ 54,886	\$ 21,935	\$ 30,489	\$ 50,271		
Life, Physical, and Social Science	\$ 37,842	\$ 19,692	\$ 26,212	\$ 36,263	\$ 47,014	\$ 58,430
Management	\$ 55,902	\$ 23,996	\$ 35,635	\$ 51,829	\$ 72,577	
Office and Administrative Support	\$ 19,529	\$ 10,568	\$ 13,931	\$ 18,568	\$ 23,945	\$ 29,440
Personal Care and Service	\$ 15,957	\$ 8,817	\$ 10,277	\$ 13,126	\$ 17,961	\$ 27,652
Production	\$ 17,886	\$ 8,834	\$ 10,637	\$ 15,083	\$ 22,262	\$ 32,135
Protective Service	\$ 24,814	\$ 10,515	\$ 12,683	\$ 19,638	\$ 36,699	\$ 44,815
Sales and Related	\$ 23,186	\$ 8,543	\$ 10,414	\$ 15,193	\$ 27,670	\$ 48,951
Total, All	\$ 26,876	\$ 9,567	\$ 13,109	\$ 21,370	\$ 34,638	\$ 51,717
Transportation and Material-Moving	\$ 19,504	\$ 8,793	\$ 10,887	\$ 15,499	\$ 22,642	\$ 30,140
2014						
Architecture and Engineering	\$ 50,327	\$ 28,291	\$ 36,257	\$ 47,351	\$ 62,023	\$ 75,181
Arts, Design, Entertainment, Sports, and Media	\$ 35,493	\$ 15,309	\$ 21,752	\$ 31,303	\$ 44,167	\$ 59,937
Building, Grounds, and Maintenance	\$ 16,796	\$ 9,930	\$ 11,473	\$ 14,870	\$ 21,161	\$ 26,741
Business and Financial Operations	\$ 47,775	\$ 23,946	\$ 31,561	\$ 42,529	\$ 57,982	\$ 77,165
Community and Social Services	\$ 27,345	\$ 14,444	\$ 18,220	\$ 24,242	\$ 35,361	\$ 45,746
Computer and Mathematical	\$ 52,523	\$ 30,584	\$ 39,653	\$ 51,400	\$ 64,933	\$ 76,087
Education, Training, and Library	\$ 29,744	\$ 14,140	\$ 18,837	\$ 26,884	\$ 37,117	\$ 47,836
Farming, Fishing, and Forestry	\$ 17,393	\$ 9,274	\$ 10,504	\$ 13,121	\$ 18,922	\$ 33,729
Food Preparation and Serving Related	\$ 13,545	\$ 9,325	\$ 10,308	\$ 11,664	\$ 14,734	\$ 20,284
Healthcare Practitioners and Technical	\$ 55,965	\$ 23,731	\$ 34,273	\$ 56,405	\$ 71,259	
Healthcare Support	\$ 20,697	\$ 12,047	\$ 15,505	\$ 19,734	\$ 26,076	\$ 29,770
Installation, Maintenance, and Repair	\$ 29,296	\$ 14,704	\$ 19,724	\$ 28,314	\$ 37,728	\$ 45,314
Legal	\$ 70,454	\$ 27,987	\$ 40,923	\$ 64,933		
Life, Physical, and Social Science	\$ 48,029	\$ 23,397	\$ 34,329	\$ 46,146	\$ 59,052	\$ 74,331
Management	\$ 73,304	\$ 30,765	\$ 44,978	\$ 67,321		
Office and Administrative Support	\$ 23,371	\$ 12,598	\$ 16,356	\$ 22,161	\$ 28,624	\$ 36,151
Personal Care and Service	\$ 16,866	\$ 9,618	\$ 10,943	\$ 13,555	\$ 19,014	\$ 29,871
Production	\$ 20,562	\$ 10,378	\$ 12,107	\$ 17,415	\$ 25,881	\$ 36,920
Protective Service	\$ 30,824	\$ 12,344	\$ 14,981	\$ 24,130	\$ 45,658	\$ 56,803
Sales and Related	\$ 27,397	\$ 10,335	\$ 11,989	\$ 17,505	\$ 30,941	\$ 59,119
Total, All	\$ 34,064	\$ 11,173	\$ 15,301	\$ 25,933	\$ 44,590	\$ 68,684
Transportation and Material-Moving	\$ 21,138	\$ 10,427	\$ 12,684	\$ 17,366	\$ 24,203	\$ 35,977

Source: California EDD, 2014

The primary takeaway from this subsection is that real wages have grown over time at a slow pace, and that the spread of wages earned in many occupations is very wide in Marin County. Based on regional cost of living, real wages rising is a sign that households are increasing their purchasing power.

Large variations in occupational wages generally suggest an occupation is broader than a single industry. Wages are simply one part of income, and a mix of providing income for the local economy and for those

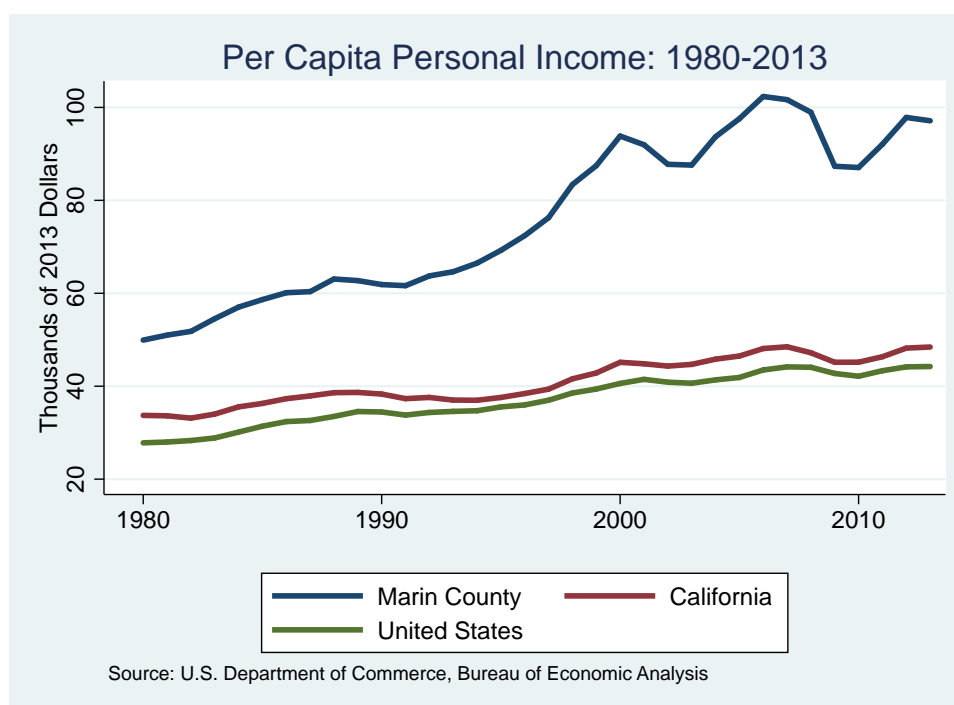
commuting into Marin County for work. The next section looks at other measures of income and more information on wages.

Incomes and Wages

Personal income, data discussed in this section, describes Marin County's residents, their wages and salaries, investment income, social assistance payments, and other income flows. Wages earned in Marin County are based on those that work in Marin County, which includes some residents. Many that commute into Marin County daily to work are also included. The employment decisions of both businesses and regional residents affect incomes and the use of Marin County's infrastructure.

Per-capita, personal income in Marin County is twice the level in California or the United States (Figure 7-6). According to the Census Bureau, in 2013, Marin County had the 10th highest median household income for any county nationally and had the highest household income in California both per-capita and by household. Incomes in the county dropped during the Great Recession between 2008 and 2011. Incomes have rebounded, but remain below previous peaks in 2008 (Figures 7-9 and 7-10).

Figure 7 - 7



These differences reflect higher levels of education and higher skilled jobs held by Marin residents, many of whom commute into San Francisco and other Bay Area labor markets for work each day.

Figure 7 - 8

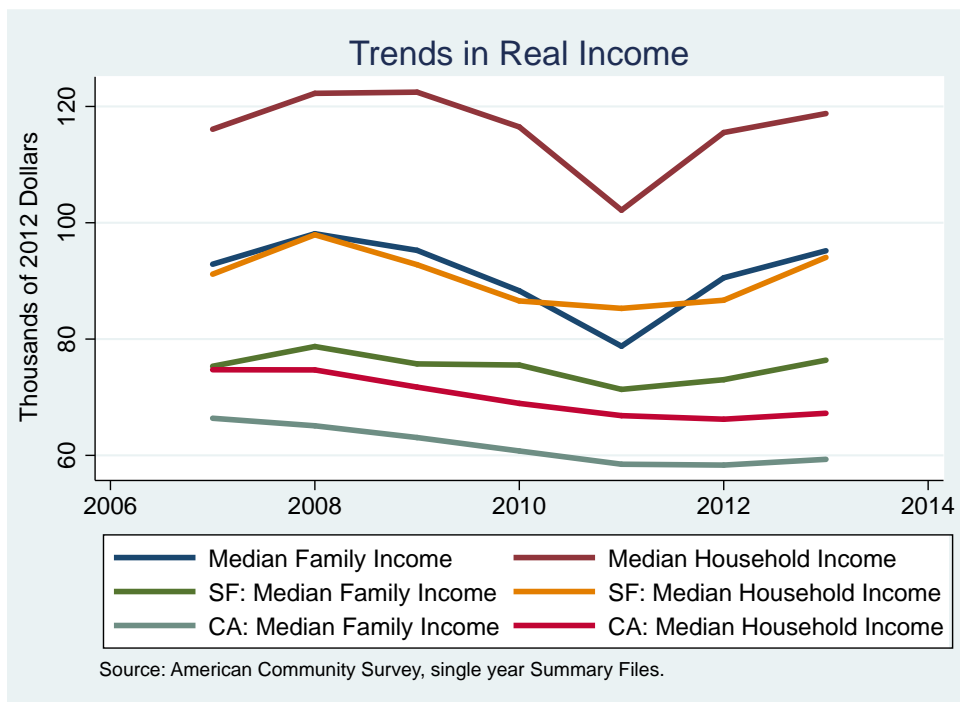


Figure 7 - 9

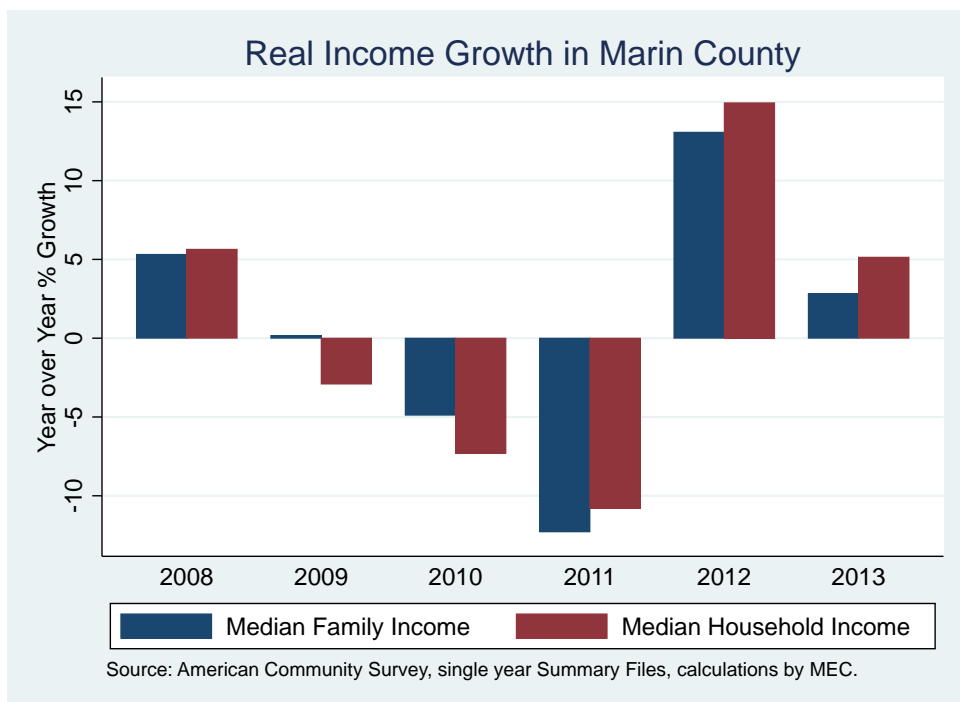


Figure 7 - 10

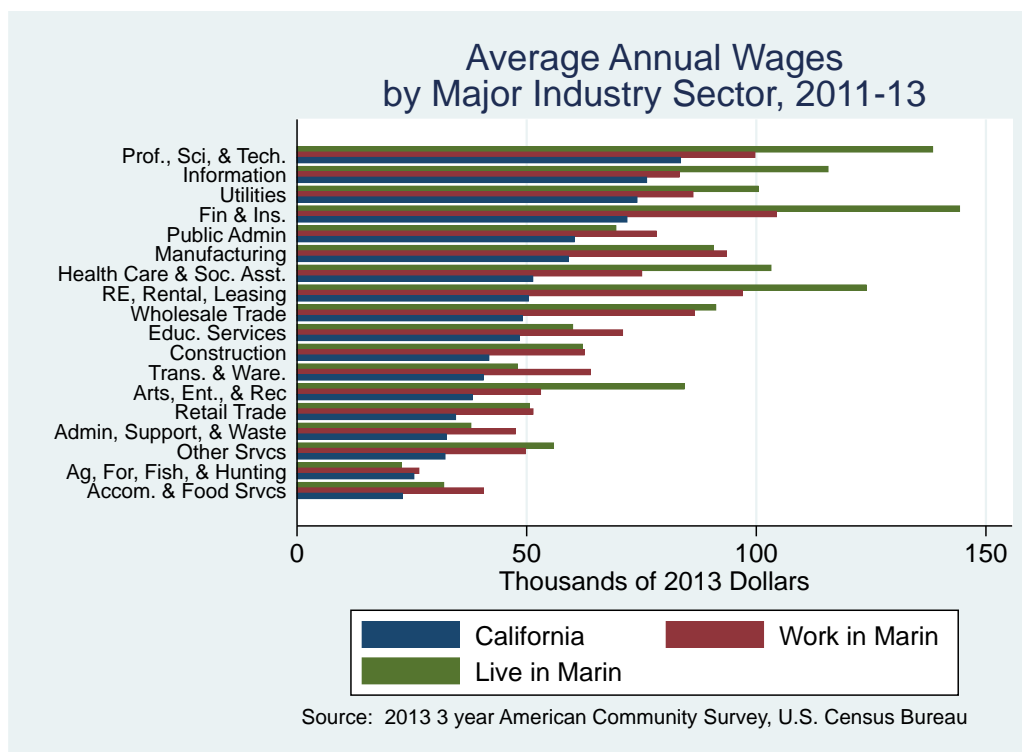


Table 7-14 makes clear that across occupations, Marin County residents that are working tend to have higher pay than do others around the state. This is true in most occupational categories, with only three exceptions: healthcare support; construction; and installation, maintenance and repair. These occupational categories are not as widely distributed by education as are others; salary ranges are much narrower, and opportunities for advancement are less. Given that Marin County workers tend to be more higher educated and to have more work experience, it is not surprising that annual pay is higher in Marin County than in the state more broadly.

Table 7-14 also highlights the importance of education in determining earnings. Higher levels of education are associated with higher levels of earnings, sometimes significantly higher, as between the earnings from an Associate's Degree or some college and the earnings associated with a Bachelor's Degree: \$107,000 in Marin County as compared to \$60,200 for those with an Associate's Degree respectively. Earnings of those in Marin are higher in nearly every education category likely reflecting age and experience.

The primary takeaway in this subsection is that per capita income and household income is relatively high in Marin County, but that is reflective of *residents* and not necessarily *workers*. As a result, there is a large consumer base in Marin County in terms of dollars for retail sales and business income, but those high incomes can also mask pockets of poverty.

Table 7 - 12. Median Wages by Occupation in Marin County, Workers

Occupation	Full Time/Full Year Employment	Annual Pay		Percent < or > California Pay
		Marin County	California	
Management, Business, and Financial	\$105,405	\$99,498	\$65,161	52.7
Computer, Engineering, and Science	99,498	84,324	78,796	7.0
Education	67,391	47,432	40,538	17.0
Legal, Community Service, Arts, and Media	99,498	72,575	48,871	48.5
Healthcare Practitioners and Technicians	105,752	84,324	65,161	29.4
Healthcare Support	36,814	20,736	24,770	-16.3
Protective Service	78,194	69,506	53,729	29.4
Food Preparation and Service	23,328	16,865	15,204	10.9
Building and Grounds Cleaning and Maintenance	28,670	18,905	18,462	2.4
Personal Care and Service	35,222	22,809	15,178	50.3
Sales and Related	78,194	42,162	27,860	51.3
Office and Administrative Support	50,595	35,838	31,104	15.2
Farming, Fishing, and Forestry	21,358	17,910	15,920	12.5
Construction and Extraction	41,472	31,104	31,839	-2.3
Installation, Maintenance, and Repair	43,441	38,207	39,799	-4.0
Production	46,656	36,892	26,878	37.3
Transportation and Material Moving	48,456	29,323	26,065	12.5
Unknown	67,657	43,225	31,010	39.4
All Workers	\$74,624	\$48,487	\$33,730	43.8

Source: U.S. Census Bureau, American Community Survey.

Table 7 - 13: Average Earnings by Educational Attainment, Thousands of 2013 Dollars

Education	Marin County	Bay Area	California	Difference Relative to:	
				Bay Area	California
Less than High School	25.7	29.1	25.7	-3.4	-0.0
High school graduate	43.8	40.0	36.0	3.7	7.8
Some college, but less than 1 year	58.4	48.0	43.0	10.5	15.4
One or more years of college, no degree	62.6	52.8	46.6	9.7	16.0
Associate's degree	60.2	58.0	52.7	2.2	7.5
Bachelor's degree	107.0	82.7	73.4	24.3	33.6
Master's degree	128.8	110.4	95.6	18.5	33.3
Professional school degree	170.1	146.7	133.9	23.3	36.2
Doctorate degree	118.4	127.6	115.2	-9.2	3.2
All Education Levels	90.9	68.9	53.9	22.0	37.0

Source: 2013 5yr American Community Survey, Calculations by Marin Economic Consulting

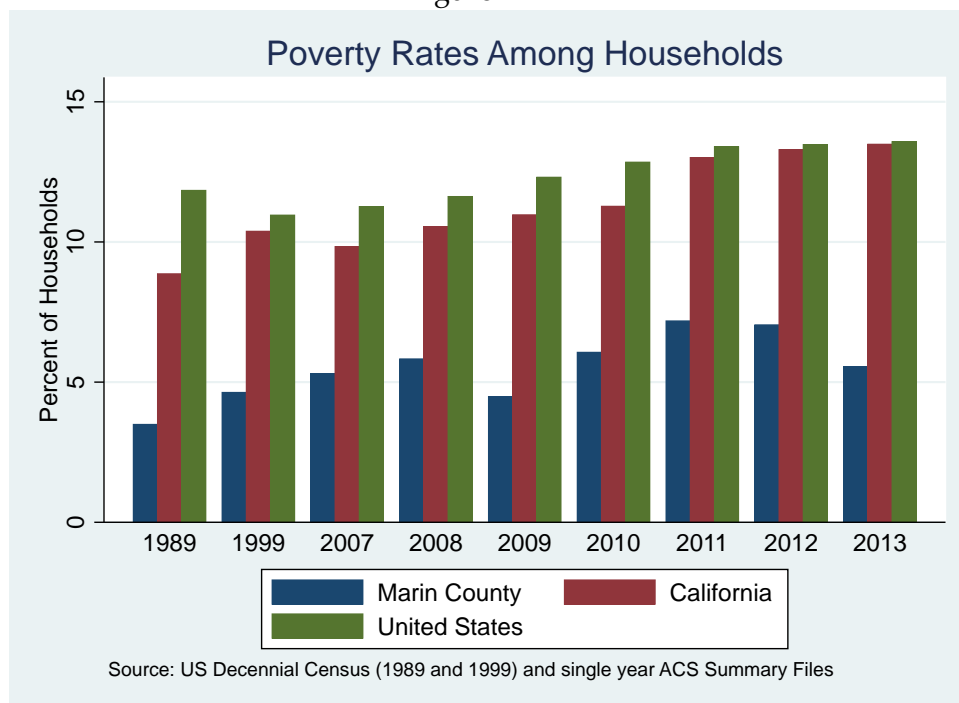
There are also pockets of poverty and households living marginally across Marin County and the region. The next set of data and tables provides information about poverty in this county.

Poverty Considerations and Data

Every county in the United States has some poverty, where one definition of poverty is earning an income equal or less to the current, federal poverty line. However, it is also important to understand that poverty is not simply an income-level issue; the ability to purchase nutritional food and sustain a household is more precisely what poverty is about. Once in poverty, health risks rise; such risks are an impetus for society to generate a "safety net". The alleviation of poverty is something that Marin County has many nonprofit organizations and governmental agencies supporting and working on daily. Social safety nets exist to provide income, health care, job transition assistance, and other needs for lower-income households. Poverty affects demand for social safety net goods and services, the provision of health care for those with lower income levels, and also exposes a percentage of the population to risks from recession or rising local costs of living.

The higher levels of per-capita personal income and earnings are consistent with relatively low levels of poverty seen in Marin County (Figure 7-12). Marin County's poverty rate has historically been between four and six percentage points below poverty rates in the state as a whole and nationwide. Despite these data, pockets of significant poverty do exist in the county. These include Marin City, the "canal" area within San Rafael (east and south of downtown San Rafael), the Hamilton Field area of southern Novato, and other pockets in Marin County.

Figure 7 - 11



Marin County provides a safety net for both local residents **and** workers that may not live in Marin County. Another dichotomy is on aging residents and their income levels. The social safety net, part of any local area's infrastructure, needs to track the number of people that may access these services. In Marin County,

Table 7 - 14. Poverty Rates Among Households

Year	Marin County	California	United States
1989	3.5	8.9	11.8
1999	4.6	10.4	11.0
2007	5.3	9.8	11.3
2008	5.8	10.5	11.6
2009	4.5	11.0	12.3
2010	6.1	11.3	12.8
2011	7.2	13.0	13.4
2012	7.0	13.3	13.5
2013	5.6	13.5	13.6

Source: U.S. Census Bureau, American Community Survey, multiple years.

there are three potential markets for social safety: low-wage workers, low-income residents, and seniors as subsets of the low-wage resident pool. Marin County is unlikely to see a drop in its per capita income levels, median household income, and other metrics to suggest the average resident of Marin County is facing poverty conditions; however, it is important that poverty levels, the ethnic, age, and gender mix of impoverished households be monitored to direct resources where the largest social impact is possible. An investment that society can make in reducing poverty is education; we now look at education data.

Education

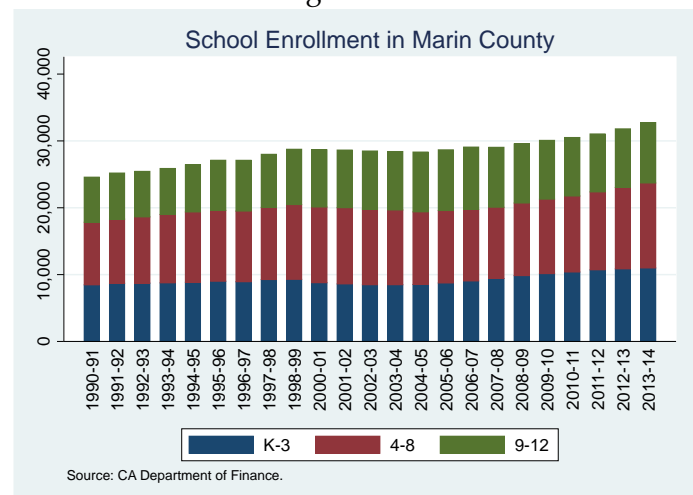
School enrollments in Marin County has been steadily trending upward over much of the last decade (Figure 7-15); enrollments are expected to continue their upward trajectory.

Table 7 - 15. Annual Change in K - 12 Enrollment, Marin County

School Year	Total Enrollment	Annual % Change in	
		Enrollment	Population
1990-91	24,582	2.68	1.39
1991-92	25,195	2.49	1.11
1992-93	25,445	0.99	0.57
1993-94	25,881	1.71	0.29
1994-95	26,426	2.11	0.30
1995-96	27,110	2.59	-0.22
1996-97	27,104	-0.02	1.46
1997-98	28,000	3.31	0.51
1998-99	28,757	2.70	0.97
2000-01	28,675	-0.32	0.12
2001-02	28,635	-0.14	-0.14
2002-03	28,493	-0.50	-0.04
2003-04	28,418	-0.26	-0.24
2004-05	28,336	-0.29	0.00
2005-06	28,669	1.18	0.23
2006-07	29,081	1.44	0.63
2007-08	29,050	-0.11	0.60
2008-09	29,550	1.72	0.38
2009-10	30,086	1.81	0.61
2010-11	30,517	1.43	0.63
2011-12	31,045	1.73	-0.15
2012-13	31,809	2.46	0.74
2013-14	32,751	2.96	1.00
2014-15 (Projected)	33,328	1.76	0.75

Source: CA Department of Finance

Enrollment data are important for several reasons. First, these data measure the evolving population of school-age children in Marin County. Second, average daily attendance is an important determinant of total funding received by schools. The Local Control Funding Formula (LCFF) recently passed by the state of California changed the way local school districts are funded in 2014.⁸ Marin County has one of the state's highest graduation rates, with 91.4% of its students completing high school or its equivalent (Table 7-15). Marin County also has a very low dropout rate at 5.1%. Statewide, the same figures were 80.2% and 11.4% in 2012-13.

Figure 7-12

⁸Please see more on the LCFF at: <http://www.cde.ca.gov/fg/aa/lc/lcffoverview.asp>.

Table 7 - 15. Marin County Graduation and Dropout Rates, 2012-2013

	Graduation Rate	Dropout Rate	
		Marin	California
Hispanic or Latino of Any Race	83.0	9.7	13.9
American Indian or Alaska Native, Not Hispanic	88.9	11.1	17.4
Asian, Not Hispanic	95.3	3.1	4.6
Pacific Islander, Not Hispanic	80.0	20.0	14.2
Filipino, Not Hispanic	100.0	0.0	4.7
African American, Not Hispanic	80.3	11.8	19.7
White, Not Hispanic	94.9	3.2	7.4
Two or More Races, Not Hispanic	91.8	1.6	9.7
Not Reported	100.0	0.0	33.7
County	91.4	5.1	11.4

Source: CA Department of Education

Local institutions of higher education also support and supply potential labor force, including Dominican University of California and College of Marin (local community college). Marin County's proximity to the greater Bay Area provides Marin County employers with exposure to a large number of college, university and high-school graduates annually, graduate and professional degree holders, and post-doctoral workers. There are seven public universities in the greater Bay Area (including the University of California campuses in Berkeley and in San Francisco), and various private institutions (including Stanford University). Marin County is currently part of a regional effort from kindergarten through community colleges to build and develop better "career pathways" for students. The regional effort is called the Northern California Career Pathways Alliance (see www.ncpathwaysalliance.org) and will likely include expanded educational infrastructure here in Marin County.

Community-college educational efforts help support local agriculture, where West Marin is an important part of Marin County's economic diversity and use of land and open space.

Agriculture and Natural Resources

Agriculture plays a visible, but relatively small role in the Marin County economy. In a county where total personal income is in excess of \$25 billion annually, total agricultural production in Marin County was estimated to be \$84 million in 2013 (Table 7-16). In comparison to its regional, peer counties, Marin agriculture is more highly concentrated in Livestock and Livestock Products versus winegrapes (in Napa and Sonoma counties to the north) and is much smaller in scale (Table 7-19)

Open space (using open land as a natural resource) is major part of Marin County's tourism efforts and also in providing recreational space for local residents (see <http://www.marincountyparks.org/depts/pk/maps> for more). The Marin Market project of the Agricultural Institute of Marin (www.agriculturalinstitute.org) is an important piece of infrastructure that links local farmers, regional farmers, food producers, education

Table 7 - 16: Marin County Agriculture Production

Type of Production	2013	2012
Livestock Products	33,406,120	34,114,000
Livestock	29,747,943	27,360,200
Field Crops	9,933,381	9,240,400
Fruit, Grape, & Vegetable Crops	5,282,475	3,754,000
Aquaculture	5,532,431	4,800,387
Nursery Crops	397,737	1,096,400
AGRICULTURAL GROSS VALUE:	84,300,087	80,365,387

Source: 2013 Livestock & Agriculture Report for Marin County

Table 7 - 17: Comparison of Production Levels, 2012 - Select North Coast Counties

Type of Production	Marin	Napa	Sonoma	Solano
Livestock, Livestock Products, & Misc	61,474,200	3,709,500	181,653,300	63,425,000
Field Crops	9,240,300	637,800	11,890,600	84,604,000
Fruit, Grape, and Vegetable Crops	3,754,000	657,293,200	611,740,100	144,279,000
Aquaculture	4,800,100	0	3,526,412	0
Nursery Crops	1,096,400	3,074,100	29,933,700	23,630,200
Totals	80365000	664714600	838744112	315938200

Source: 2013 Livestock & Agriculture Report for Marin County and 2013 Sonoma County Crop Report

about food systems, tourism, and other parts of Marin County's community to each other in one place. Over time, use of open space as agriculture may expand the breadth and depth of local food systems and markets.

Cheese manufacturing has become a tourism attraction **and** rising business sector in Marin County. As another way to link the agricultural areas of Marin County to other industries, local cheese makers and dairies have come together to form a "Cheese Trail Map". This map (found at <http://cheesetrail.org/>) provides tourists with a way to identify which cheese makers have facilities for tourists and also for manufacturing. Open space and agricultural lands in Marin County are a major tourism asset.

Travel and Tourism

Marin County is beset on all sides by major tourism areas, and also draws a fair number of tourists to attractions within Marin County. Specifically, West Marin and the Golden Gate National Recreational Area (GGNRA) that stretches from San Francisco north to Point Reyes Station brings hikers, campers, school field trips, and many others to Marin County. Central Marin is also a draw based on events at the Marin Civic Center, which has a theater facility, conference space, and an exhibition hall. Marin County also has an annual fair, as do other counties and areas in California, which draws tourists (see www.marinfair.org for more).

From an infrastructure standpoint, Marin County has a regional role to provide a thoroughfare for travelers going north to Napa and Sonoma counties, the core of California's wine country (which also includes Mendocino and Lake counties), as well as southbound tourists going to San Francisco and other points in the greater Bay Area. Marin County has at least three lanes of freeway for the north-south directions and

Table 7 - 18: Marin County Travel Benefits, 2012

County	Dollars per 1,000 Residents			
	Tourism Spending	Rank	TOT Revenue	Rank
Alameda	2,182.4	3	26.5	3
Contra Costa	1,277.6	1	10.3	1
Marin	2,761.0	5	32.0	4
Napa	7,622.1	8	229.7	8
San Francisco	14,601.1	9	295.3	9
San Mateo	3,998.5	7	72.2	7
Santa Clara	2,477.4	4	41.1	5
Solano	1,427.0	2	10.4	2
Sonoma	3,178.4	6	45.8	6
California	2,805.2		42.6	

Source: Dean Runyan Associates, 2013, DOF,
Calculations by MEC

one-lane roads each direction to the county line moving east to west. Also, the SMART railway that intends to connect the Larkspur Ferry Terminal from San Francisco to Marin County and Sonoma County going north adds to the tourism capacity in Marin County. These were discussed in the previous section.

Tables 7-18 and 7-19 look at aggregate data on tourism in Marin County. The Point Reyes National Seashore (GGNRA's portion in Marin County) reports that 2.6 million visitors came to the seashore in 2013 (likely more in 2014), but it is unknown how much of that visitor base is repeat business over the year, how much of the visitor base is overnight stay, or how far it migrates.⁹

Table 7 - 19: Marin County Travel Impacts, 1992-2012

	1992	2007	2008	2009	2010	2011	2012
Total Direct Travel Spending (\$Million)							
Visitor Spending at Destination	276.3	716.7	74.4	619.3	643.3	668.1	684.8
Other Travel*	22.2	15.3	16.5	15.1	16.2	16.3	16.4
Total Direct Spending	298.6	732.0	760.9	634.4	640.5	684.4	701.2
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel	104.9	381.9	369.9	331.1	328.1	356.5	368.9
Private Campground	5.1	48.7	50.6	24.0	24.9	26.8	27.6
Public Campground	4.3	4.8	5.0	3.6	3.8	4.1	4.2
Private Home	64.9	92.5	95.8	91.1	94.4	98.7	99.9
Vacation Home	20.9	31.5	32.3	31.3	31.9	33.2	33.7
Day Travel	76.2	157.3	163.8	138.2	141.2	148.9	150.4
Spending at Destination	276.3	716.7	744.4	619.3	624.3	668.1	684.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	42.8	156.5	158.3	122.7	120.4	136.8	148.4
Food & Beverage Services	71.0	183.5	193.4	173.1	171.2	176.5	180.2
Food Stores	11.0	28.5	30.6	24.2	23.7	25.0	25.4
Ground Tran. & Motor Fuel	36.0	101.4	111.3	79.1	93.5	110.7	111.5
Arts, Entertainment & Recreation	50.0	114.6	117.1	102.5	99.2	100.6	100.7
Retail Sales	65.6	132.2	133.7	117.6	116.3	118.6	118.6
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	276.3	716.7	744.4	619.3	624.3	668.1	648.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accommodations & Food Services	54.6	176.4	184.5	159.8	150.0	165.8	198.4
Arts, Entertainment & Recreation	30.1	73.8	77.8	67.4	66.5	60.7	57.7
Retail**	11.3	24.0	24.1	20.2	19.4	19.8	20.2
Auto Rental & Ground Tran.	0.3	0.8	0.9	0.9	0.9	0.9	1.0
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	11.5	7.9	8.5	7.8	8.4	8.5	8.5
Total Direct Earnings	107.8	283.0	295.7	256.1	245.1	255.6	285.8
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Services	2,070	4,400	4,380	3,880	3,590	3,910	4,320
Arts, Entertainment & Recreation	1,290	2,410	2,220	2,010	1,800	1,850	1,850
Retail**	490	670	660	560	540	560	560
Auto Rental & Ground Tran.	20	20	30	30	30	30	30
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	440	160	180	150	160	150	150
Total Direct Employment	4,310	7,650	7,470	6,620	6,110	6,500	6,910
Tax Receipts Generated by Travel Spending (\$Millions)							
Local Tax Receipts	4.8	17.8	18.2	14.5	14.6	16.4	17.5
State Tax Receipts	12.2	27.8	28.6	26.9	28.5	29.2	28.5
Total Direct Tax Receipts	17.0	46.0	47.0	41.0	43.0	46.0	46.0

Source: Dean Runyan Associates, 2013

⁹see <http://www.nps.gov/pore/learn/management/statistics.htm> for more data

Transient occupancy tax (TOT) data from Marin County suggests that overnight stays are rising since 2011, as occupancy rates have risen. Marin County's tourism industries have rebounded and also feed off regional visitor movements.

People that live in areas to the north and northeast also come through Marin County, primarily on their way to the greater Bay Area. There are also visitors that come to the Bay Area (as San Francisco, California is a major tourism destination) and come to Marin County on side trips or to stay and access San Francisco that way.

Retail Sales Base

Marin County has a personal income level that suggests retail sales would be relatively high per the state average. In fact, in 2013, Marin County ranked just behind Placer and San Francisco counties as the third highest taxable sales per capita county in California.

Table 7 - 20: Median Household Income and Personal Income per Person, 2005-2013

Median Household Income				Personal Income Per Person			
County	2005	2010	2013	County	2005	2010	2013
Santa Clara	\$86,008	\$84,627	\$85,374	Marin	\$91,591	\$81,504	\$91,214
Marin	\$87,492	\$82,383	\$84,570	San Francisco	\$70,417	\$68,135	\$79,223
San Mateo	\$83,316	\$82,413	\$82,115	San Mateo	\$69,849	\$65,953	\$75,031
Contra Costa	\$77,907	\$73,678	\$73,321	Santa Clara	\$58,003	\$56,939	\$65,882
Ventura	\$74,619	\$71,418	\$71,262	Contra Costa	\$57,878	\$55,118	\$59,545
San Francisco	\$64,463	\$70,883	\$70,387	El Dorado	\$50,187	\$49,653	\$54,020
Orange	\$73,825	\$70,727	\$70,217	Napa	\$51,321	\$48,608	\$53,188
Placer	\$70,408	\$68,330	\$67,706	Alameda	\$49,894	\$47,854	\$51,970
Alameda	\$68,345	\$66,937	\$67,136	Santa Cruz	\$49,527	\$46,880	\$51,625
Napa	\$70,474	\$62,893	\$65,582	Placer	\$50,294	\$47,758	\$51,582
El Dorado	\$69,760	\$65,201	\$64,515	Orange	\$52,869	\$48,826	\$51,201
Solano	\$69,295	\$62,948	\$62,541	San Diego	\$47,125	\$45,501	\$48,257
Santa Cruz	\$64,497	\$60,247	\$61,929	Ventura	\$47,186	\$44,912	\$47,433
San Benito	\$69,778	\$58,194	\$61,666	Sonoma	\$47,255	\$43,246	\$47,250
Sonoma	\$65,174	\$58,703	\$58,984	Nevada	\$44,374	\$43,080	\$47,096
US	\$51,809	\$50,046	\$49,348	Santa Barbara	\$46,784	\$43,684	\$46,830
California	\$60,146	\$57,664	\$56,878	California	\$43,641	\$42,282	\$45,487

Source: Census Bureau and Bureau of Economic Analysis

Sales tax revenue to fund county and city projects and expenses are derived from a subset of overall retail sales. Based on the sales taxes generated, there is an implied level of retail sales that are made that are taxable. Sales tax forecasts for Marin County are available from the SMART rail system as part of their strategic planning, and there is some debate over which component of real personal income per capita growth will be a stronger force in the years ahead.

Table 7-21: Home Sales and Median Prices by County

All Homes	Sales	Median Prices		
	Dec. 2014	Dec. 2013	Dec. 2014	% Change
Alameda	1,545	\$525,000	\$555,000	5.70
Contra Costa	1,447	\$405,000	\$455,000	12.30
Marin	276	\$755,000	\$915,000	21.20
Napa	122	\$425,000	\$450,000	5.90
Santa Clara	1,774	\$625,000	\$689,500	10.30
San Francisco	529	\$813,000	\$949,000	16.70
San Mateo	666	\$750,000	\$808,000	7.70
Solano	535	\$272,000	\$310,000	14.00
Sonoma	562	\$415,000	\$454,500	9.50
California	36,468	\$365,000	\$388,000	6.40
Bay Area	7,456	\$548,500	\$603,000	9.90
Los Angeles Area	19,205	\$395,000	\$415,000	5.10

Source: DQNews.com

Housing

In December of 2014, median home values in Marin County were reported at \$915,000, a 21.2% increase from the same month in 2013 (Table 7-21). This ranks Marin County among the top counties in terms of median home prices. These high home prices are a result of both the highly-desirable nature of residing in Marin County and a slow response on the supply side (both economically and politically) to rising housing demand.

Housing is one of the most contentious items in Marin County's political circles. If targeting industries works, and there is more job and business growth, Marin County will face more pressure to house its employees. The next section is about the goals of this CEDS and the evolution of Marin County over the next five years. Housing prices, affordability, and availability touch on many parts of Marin County's economy in terms of jobs, economic growth, and the role of housing as infrastructure for the county's residents and businesses.

Marin County's home prices are relatively high, which augments the local cost of living. As a result, wage pressure builds, commutes lengthen, and the competition for Marin County employers to find skilled workers becomes more regional and costly. This is a cost of growth.

Housing infrastructure in Marin County is an ongoing debate concerning locations for new housing, the type of new housing, and the socioeconomic effects of expanding the housing stock as the county population grows. In considering industries to target, the costs of commuting, living locally, and wage demands are all naturally linked. This section of the CEDS has provided a comprehensive look at the economic aspects of Marin County in a regional context. We now look at determining targeted industries.

Table 7-22: Housing Units: California, Bay Area Counties, and Marin County

Year	Place	Population (# of people)	Housing Units (# of houses)	Percent of Total				Occupied	Vacancy Rate	Persons per Household
				Single Detached	Single Attached	Two to Four	Five Plus			
2010	California	37,253,956	13,670,304	58.2%	7.1%	8.1%	22.5%	91.9%	8.1%	2.90
	Bay Area	6,898,330	2,672,777	53.4%	9.2%	10.1%	25.1%	93.7%	6.3%	2.70
	Marin	252,409	111,214	61.3%	10.1%	7.4%	19.5%	92.8%	7.2%	2.36
2011	California	37,427,946	13,704,850	58.2%	7.1%	8.1%	22.5%	91.9%	8.1%	2.90
	Bay Area	6,935,244	2,678,797	53.4%	9.2%	10.1%	25.2%	93.7%	6.3%	2.71
	Marin	253,040	111,323	61.3%	10.1%	7.4%	19.4%	92.8%	7.2%	2.36
2012	California	37,668,804	13,740,488	58.2%	7.1%	8.1%	22.6%	91.9%	8.1%	2.92
	Bay Area	6,995,798	2,687,231	53.3%	9.2%	10.0%	25.3%	93.7%	6.3%	2.72
	Marin	253,373	111,433	61.4%	10.1%	7.4%	19.4%	92.7%	7.3%	2.37
2013	California	37,984,138	13,785,855	58.1%	7.0%	8.1%	22.7%	91.9%	8.1%	2.93
	Bay Area	7,077,766	2,696,327	53.3%	9.2%	10.0%	25.4%	93.7%	6.3%	2.75
	Marin	254,696	111,539	61.3%	10.1%	7.4%	19.5%	92.8%	7.2%	2.38
2014	California	38,340,074	13,845,281	58.1%	7.0%	8.1%	22.8%	92.0%	8.0%	2.95
	Bay Area	7,164,607	2,710,616	53.2%	9.2%	10.0%	25.6%	93.7%	6.3%	2.77
	Marin	255,846	111,656	61.3%	10.1%	7.4%	19.5%	92.7%	7.3%	2.39

Source: California Department of Finance

Targeted Industries

Identifying Targeted Industries

Targeted industries are those that policymakers should consider as industries upon which to focus local economic development efforts. This report provides evidence for what these targeted industries should be in Marin County. The following criteria are used in trying to define these industries:

1. Recent growth of employment in Marin County;
2. Recent growth of employment in the Bay Area overall;
3. A "shift share" analysis that compares Marin County to California overall and signals any local comparative advantage over time;
4. The number of "base" jobs in an industry (employers that seek markets beyond Marin County for their products and services) versus locally-serving jobs that service Marin County's residents as a marketplace;
5. The "multiplier" effects on employment and revenue by industry; and then two questions:
6. Are efforts underway to expand the number of employers and jobs for this industry?; and
7. Does infrastructure and community support exist for this industry's growth?.

The reader will notice that there is reference to "NAICS" codes. These are the North American Industry Classification System (NAICS) codes that identifies every type of employer (hospitals, hotels, lotion manufacturing, etc.). Occupations are identified by the Standard Occupational Codes or SOC; these define specific types of workers (registered nurse, hotel manager, janitor, etc.). When we speak of targeted industries later, it will be for specific industries or employers. When those industries grow, there are many different types of workers affected.

Social and environmental considerations come in the last two criteria. In the 2004 targeted industries study (2004 TIS), there was a large emphasis on growing jobs and businesses that provided for economic growth, social equity and environmental balance.¹⁰ The first five criteria cover economic vitality, where the sixth criterion takes into consideration how Marin County's economic development efforts affect social issues and equity.

Being "green" has become a way of doing business, not a specialty. State-level legislation, specifically AB 32 (see <http://www.arb.ca.gov/cc/ab32/ab32.htm>) and SB 375 (see <http://www.arb.ca.gov/cc/sb375/sb375.htm>), has provided regulatory reasons for California (let alone Marin County) businesses to be environmentally aware in their practices and products. Marin Clean Energy (MCE) was born as a business on this idea (<http://www.mcecleanenergy.org/>). Targeting industries with an emphasis on "green" practices seems superfluous in 2015 for the right reasons: best practices have shifted to more sustainable business models. However, as discussed below, there are some industries where a careful eye must remain on preserving Marin County's aesthetic and open space (the juxtaposition of visitors and agriculture, for example). Businesses that are directly tied to energy (solar, wind, etc.) and water (water-saving design and technology) resiliency, as well as businesses that generate less traffic and lower threats of environmental imbalance make for good target industries.

The social side is more controversial. The confluence of rising home prices, slow wage growth, rising costs of transportation, and a lack of transportation options since 2009 has driven a perceived talent shortage in Marin County and the North Bay overall (including Sonoma and Napa). There are social issues on all sides: workers want higher wages; the cities of Oakland and San Francisco have now forced minimum wages up in 2015. Such changes will spill over to Marin County over time, and perhaps alleviate low-wage issues (such as income inequality and lower real wages), but may also exacerbate high costs of living. Industry growth comes with higher wages and more demand for local housing; inflation of any kind is a by-product of demand growth against falling or stable supply.

Understanding how Marin County has both a competitive advantage in some industries and a competitive disadvantage in others helps ascertain how certain industries will grow (or not grow) into the next decade. In each subsection below, these seven criteria will be described as a way to guide the reader. At the end of each section, there will be a "So What?" question asked to further point out the importance of that criterion and how the data connect and point to the specific industries to include.

1. Growth of Employment in Marin County

Employment growth projections provide some ways to consider how a local economy will create jobs. Two major questions immediately come to mind:

- What will happen to overall wages as the number of jobs increase?; and
- How will infrastructure support such growth?

¹⁰The 2004 TIS documents can be found at the following website: <http://www.marineconomicforum.org/resources/reports/>.

These questions are important because job growth locally will best happen if:

- Local wages are attractive to regional workers; and
- Transportation and housing infrastructure supports either a low-cost, sustainable commuting model (more use of mass transit or more automobile traffic);
- More housing units; or a combination.

Table 7 - 23 shows the projected growth of employment for specific industries in Marin County. The data show the expected percentage growth on an annual basis through 2022; these are the fastest growth industries by the California Employment Development Department (EDD).

Table 7 - 23 Employment Growth in Marin County, 2015-2022, Annual Growth

Industry	Estimated Employment 2012	Projected Employment 2022	Annual Change Jobs	Annual Change Percent
Pharmaceuticals	1,012	1,463	45	4.5%
Publishing Industries (including Software)	2,156	2,959	80	3.7%
Social Assistance	4,422	5,819	140	3.2%
Nursing and Residential Care Facilities	1,397	1,760	36	2.6%
Ambulatory Health Care Services	3,817	4,807	99	2.6%
Accommodation	2,761	3,410	65	2.4%
Telecommunications	649	770	12	1.9%
Food Services and Drinking Places	9,768	11,517	175	1.8%
Performing Arts, Spectator Sports, and Related Industries	781	902	12	1.5%
Administrative and Support Services	6,336	7,293	96	1.5%
General Merchandise Stores	1,408	1,584	18	1.3%
Specialty Trade Contractors	2,167	2,420	25	1.2%
Financial Investments and Related Activities	2,321	2,585	26	1.1%
Food and Beverage Stores	2,343	2,607	26	1.1%
Health and Personal Care Stores	792	880	9	1.1%
Hospitals (Private)	1,936	2,123	19	1.0%
Computer and Electronic Product Manufacturing	924	1,012	9	1.0%
Personal and Laundry Services	1,518	1,661	14	0.9%
Real Estate	1,683	1,815	13	0.8%
Air Transportation	1,518	1,628	11	0.7%
Broadcasting (except Internet)	418	440	2	0.5%
Clothing and Clothing Accessories Stores	1,364	1,408	4	0.3%
Motion Picture and Sound Recording Industries	429	440	1	0.3%
Miscellaneous Store Retailers	704	715	1	0.2%

Source: California EDD

So What?

Previous data in this report show that services businesses have been the main growth industries throughout Marin County since 1990. Because many of these businesses serve the local population, tourists, and local businesses, Marin County's demography and business mix will continue to influence the businesses that grow. Marin County has a regional advantage in life sciences, which provides some research and development jobs as well as some manufacturing that can help with balance. Some of those businesses will come from regional growth.

2. Recent Growth in Employment and Business Regionally

Table 7 - 24: Industry Growth 1990-2013, Marin County

NAICS	Industry	1990-2013	1995-2013	2000-2013	2005-2013	2010-2013
10	Total	10.2%	6.9%	-5.0%	-1.4%	7.4%
111	Crop Production	-49.0%	-77.7%	-35.2%	-56.1%	-19.9%
112	Animal Production	-22.2%	-1.1%	-31.6%	-30.3%	-10.6%
115	Support Activities for Agriculture and Forestry	92.0%	317.4%	77.8%	-23.2%	15.7%
236	Construction of Buildings	-16.6%	16.7%	-40.5%	-50.5%	9.4%
237	Heavy and Civil Engineering Construction	-60.9%	-12.5%	-13.8%	-22.2%	-29.9%
238	Specialty Trade Contractors	-5.5%	24.1%	-21.4%	-17.9%	-2.1%
311	Food Manufacturing	10.0%	26.2%	87.9%	65.4%	20.1%
312	Beverage and Tobacco Product Manufacturing				275.0%	43.8%
314	Textile Product Mills	-54.8%	-64.2%	-64.2%	-24.0%	-20.8%
315	Apparel Manufacturing	108.2%	-6.4%	20.0%	-26.1%	30.8%
321	Wood Product Manufacturing	-70.0%	-79.5%	-69.0%	-67.9%	-52.6%
323	Printing and Related Support Activities	-82.3%	-82.7%	-78.7%	-68.7%	-18.9%
325	Chemical Manufacturing	20.9%	219.1%	234.1%	259.5%	61.4%
326	Plastics and Rubber Products Manufacturing	-97.0%	-95.2%	-94.2%		-87.7%
327	Nonmetallic Mineral Product Manufacturing	-35.1%	18.6%	-5.3%	25.8%	25.8%
332	Fabricated Metal Product Manufacturing	-12.4%	-28.8%	-24.9%	3.8%	-6.3%
333	Machinery Manufacturing	-64.8%	-68.2%	-69.5%	53.8%	63.9%
334	Computer and Electronic Product Manufacturing	-71.4%	-86.2%	-75.9%	-13.6%	17.7%
336	Transportation Equipment Manufacturing	29.2%	-31.1%	3.3%	-21.5%	8.8%
337	Furniture and Related Product Manufacturing	-77.6%	-79.3%	-81.8%	-79.6%	0.0%
339	Miscellaneous Manufacturing	-83.8%	-78.3%	-74.0%	-43.0%	8.5%
423	Merchant Wholesalers, Durable Goods	-38.4%	-16.8%	-8.7%	20.9%	26.7%
424	Merchant Wholesalers, Nondurable Goods	-32.3%	-29.6%	-14.9%	-7.8%	6.4%
425	Wholesale Electronic Markets and Agents and Brokers	-23.2%	3.0%	13.8%	-1.8%	1.3%
441	Motor Vehicle and Parts Dealers	10.3%	13.9%	-9.3%	-7.4%	3.7%
442	Furniture and Home Furnishings Stores	71.8%	23.6%	-11.2%	-6.9%	22.1%
443	Electronics and Appliance Stores	-18.2%	-5.0%	-44.6%	-28.9%	-25.0%
444	Building Material and Garden Equipment and Supplies Dea	12.9%	-2.7%	-30.7%	-23.1%	0.6%
445	Food and Beverage Stores	33.7%	24.1%	21.4%	12.5%	6.0%
446	Health and Personal Care Stores	-12.8%	-8.8%	-18.1%	-17.0%	-16.3%
447	Gasoline Stations	-56.1%	-45.0%	-29.8%	23.3%	-0.8%
448	Clothing and Clothing Accessories Stores	-41.3%	-38.4%	-43.1%	-39.4%	16.3%
451	Sporting Goods, Hobby, Book, and Music Stores	-36.8%	-24.2%	-23.4%	-22.5%	-17.1%
452	General Merchandise Stores	-11.1%	0.4%	11.1%	24.0%	9.6%
453	Miscellaneous Store Retailers	12.4%	10.8%	-14.5%	-1.8%	20.9%
454	Nonstore Retailers	-21.8%	21.5%	-48.6%	-1.7%	19.9%
484	Truck Transportation	-54.6%	-12.2%	-17.2%	-29.0%	28.1%
485	Transit and Ground Passenger Transportation	-38.3%	57.3%	-6.3%	0.5%	11.4%
488	Support Activities for Transportation	-7.3%	-15.5%	-17.3%	-12.8%	31.7%
492	Couriers and Messengers		-34.1%	-47.0%	-27.2%	-0.4%
493	Warehousing and Storage	-66.0%	-21.7%	-37.9%		50.0%
511	Publishing Industries (except Internet)	-39.9%	-46.3%	-34.4%	23.5%	97.8%
512	Motion Picture and Sound Recording Industries	4.8%	-52.4%	-67.3%	-65.2%	42.5%
515	Broadcasting (except Internet)	42.4%		34.8%	12.5%	
517	Telecommunications	-41.6%	-23.7%	-42.9%	5.5%	-14.3%
518	Internet Service Providers, Web Search Portals, and Dat	29.4%	-56.4%	-63.5%	-26.6%	-9.4%
522	Credit Intermediation and Related Activities	-39.0%	-23.0%	-16.6%	-40.5%	17.3%
523	Securities, Commodity Contracts, and Other Financial In	138.8%	108.0%	22.2%	14.2%	26.2%
524	Insurance Carriers and Related Activities	-52.3%	-46.4%	-41.5%	-14.8%	-2.7%
525	Funds, Trusts, and Other Financial Vehicles	-76.2%	-78.3%	-90.3%	-92.0%	-89.6%
531	Real Estate	-10.9%	-8.0%	1.4%	-14.6%	2.0%
532	Rental and Leasing Services	-22.1%	-54.0%	-63.3%	-31.5%	12.5%
533	Lessors of Nonfinancial Intangible Assets (except Copyr		-98.6%	-97.5%	-96.6%	-89.3%
541	Professional, Scientific, and Technical Services	42.7%	29.2%	-2.1%	-3.3%	-5.0%
551	Management of Companies and Enterprises	172.9%	59.3%	9.1%	0.4%	10.3%
561	Administrative and Support Services	71.1%	39.2%	-9.8%	17.5%	11.5%
562	Waste Management and Remediation Services	143.2%	59.9%	-11.2%	-8.7%	-4.4%
611	Educational Services	105.6%	83.2%	40.6%	21.5%	13.0%
621	Ambulatory Health Care Services	67.3%	47.1%	38.9%	43.2%	11.5%
622	Hospitals	-40.0%	-47.0%	-38.6%	-60.0%	-36.5%
623	Nursing and Residential Care Facilities	25.5%	18.2%	5.5%	7.6%	8.7%
624	Social Assistance	137.2%	89.1%	130.0%	129.6%	68.0%
711	Performing Arts, Spectator Sports, and Related Industri	-48.4%	21.6%	3.9%	-14.2%	2.8%
712	Museums, Historical Sites, and Similar Institutions	237.8%	23.6%	31.0%	43.4%	22.6%
713	Amusement, Gambling, and Recreation Industries	61.9%	63.3%	14.5%	1.7%	-0.5%
721	Accommodation	79.9%	147.5%	36.7%	34.7%	72.5%
722	Food Services and Drinking Places	31.1%	8.8%	13.7%	15.3%	16.5%
811	Repair and Maintenance	5.8%	-2.2%	-13.8%	-5.0%	-6.1%
812	Personal and Laundry Services	0.6%	17.8%	18.7%	1.8%	1.4%
813	Religious, Grantmaking, Civic, Professional, and Simila	91.3%	57.0%	35.1%	46.9%	12.8%
814	Private Households	-6.8%	-44.0%	-50.4%	-60.1%	-59.6%

Source: California EDD

Table 7-25: Regional Growth Comparison, Marin County and California

Marin County	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total-Private Industry	-0.1%	-0.7%	-0.7%	-1.1%	-1.0%	-7.9%	-8.9%	-8.9%	-5.2%	-2.1%
Agriculture, Forestry, Fishing and Hunting	3.8%	6.1%	1.4%	-22.1%	-20.5%	-20.7%	-29.9%	-31.3%	-38.7%	-36.2%
Construction	2.7%	4.2%	-3.7%	0.7%	-4.1%	-25.9%	-31.4%	-32.6%	-32.8%	-32.0%
Wholesale Trade	-2.7%	-8.7%	-3.9%	-3.8%	-6.1%	-17.4%	-15.9%	-14.9%	-7.7%	-4.4%
Information	-1.0%	0.1%	-2.2%	-29.3%	-33.6%	-36.2%	-44.0%	-20.6%	-16.3%	-16.2%
Finance and Insurance	-3.8%	-4.4%	-5.2%	-7.6%	-20.2%	-25.2%	-30.6%	-29.8%	-26.6%	-25.9%
Real Estate and Rental and Leasing	2.5%	0.4%	-0.7%	-4.8%	-1.7%	-8.2%	-21.8%	-20.1%	-23.4%	-20.0%
Professional, Scientific, and Technical Services	8.3%	11.4%	17.0%	15.2%	21.3%	11.1%	13.4%	4.3%	6.8%	7.8%
Management of Companies and Enterprises	-1.7%	11.9%	15.1%	10.5%	7.0%	-3.4%	1.8%	5.4%	13.6%	12.3%
Administrative and Support and Waste Management and Rem	5.7%	-5.9%	0.5%	7.3%	9.3%	-1.4%	-1.6%	-4.4%	2.0%	8.6%
Educational Services	6.2%	6.4%	5.5%	12.2%	14.7%	15.3%	14.4%	18.2%	30.2%	29.3%
Health Care and Social Assistance	-1.0%	-0.4%	1.4%	0.4%	2.7%	6.8%	5.1%	4.4%	6.5%	22.2%
Arts, Entertainment, and Recreation	-3.9%	-5.4%	-7.6%	1.9%	6.0%	2.7%	-6.9%	-6.1%	-7.2%	-5.7%
Accommodation and Food Services	-3.5%	-3.4%	-1.9%	-0.6%	1.0%	-5.2%	-6.7%	-0.4%	7.9%	13.5%
Other Services (except Public Administration)	2.7%	-0.7%	2.3%	3.7%	3.3%	0.8%	6.6%	1.1%	11.0%	-6.8%
Manufacturing	-16.7%	-21.9%	-24.7%	-33.0%	-33.0%	-36.1%	-34.5%	-39.5%	-35.4%	-25.3%
Retail Trade	-2.0%	-3.3%	-6.3%	-4.6%	-6.7%	-15.2%	-12.9%	-13.4%	-11.8%	-10.1%
Transportation and Warehousing	-1.7%	0.2%	-8.6%	-14.0%	-17.8%	-31.7%	-27.8%	-22.1%	-18.5%	-19.5%
California	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total-Private Industry	1.3%	3.5%	5.5%	6.2%	4.8%	-1.9%	-3.2%	-1.5%	1.9%	5.3%
Agriculture, Forestry, Fishing and Hunting	-2.1%	0.7%	0.3%	2.1%	3.7%	-1.1%	1.3%	3.0%	5.6%	8.9%
Construction	7.8%	14.8%	18.5%	13.2%	-0.3%	-21.2%	-29.1%	-28.9%	-25.2%	-19.2%
Wholesale Trade	0.7%	3.9%	8.4%	10.9%	9.2%	0.0%	-0.6%	1.5%	4.3%	7.6%
Information	2.3%	-0.4%	-0.4%	-0.2%	-0.8%	-7.0%	-10.3%	-10.0%	-9.2%	-6.0%
Finance and Insurance	1.4%	4.9%	5.5%	1.1%	-6.4%	-11.6%	-16.4%	-16.1%	-14.5%	-14.5%
Real Estate and Rental and Leasing	1.1%	3.7%	6.2%	3.3%	0.6%	-6.8%	-9.4%	-10.0%	-8.4%	-5.7%
Professional, Scientific, and Technical Services	0.2%	5.4%	12.0%	16.4%	18.6%	11.3%	11.8%	15.7%	21.1%	25.2%
Management of Companies and Enterprises	-8.5%	-12.8%	-16.8%	-19.2%	-19.6%	-22.6%	-24.8%	-22.5%	-20.8%	-14.8%
Administrative and Support and Waste Management and Rem	0.6%	2.7%	6.4%	6.6%	1.5%	-9.9%	-8.5%	-6.1%	-0.4%	4.9%
Educational Services	2.1%	5.5%	8.9%	13.5%	19.5%	22.6%	19.5%	29.2%	35.0%	36.7%
Health Care and Social Assistance	1.1%	2.1%	4.6%	7.9%	10.9%	13.1%	15.7%	17.8%	20.9%	52.7%
Arts, Entertainment, and Recreation	0.5%	0.7%	3.6%	6.2%	7.4%	3.3%	3.5%	4.6%	8.4%	12.9%
Accommodation and Food Services	2.8%	5.6%	9.4%	12.1%	12.7%	7.7%	7.7%	10.1%	14.8%	20.6%
Other Services (except Public Administration)	3.9%	7.0%	9.3%	12.0%	15.2%	15.5%	12.1%	12.8%	25.5%	-24.9%
Manufacturing	-0.9%	-2.2%	-2.4%	-5.2%	-7.7%	-16.7%	-19.4%	-19.2%	-18.7%	-18.7%
Retail Trade	1.5%	3.8%	5.6%	6.0%	2.9%	-4.7%	-5.2%	-3.8%	-1.7%	0.4%
Transportation and Warehousing	0.8%	1.8%	3.4%	5.5%	5.9%	-1.7%	-3.1%	-1.8%	0.8%	5.1%

Source: California Employment Development Department (EDD)

The next criterion is about regional growth. Labor resources are shared regionally. Recent wage data suggest that as economic growth has taken place since the recession's end, wages have not risen in step with the local cost of living. The mix of industries and number of workers **regionally** competing for a smaller number of jobs provides employers with some advantage in labor markets. Because transportation costs have remained relatively stable since 2008, and home prices have risen more quickly in rising wage areas, commuting workers can take advantage of higher wages in metropolitan areas of the Bay Area while living in suburban cities and towns. Wage and cost of living pressure will continue to ripple out to other parts of the Bay Area.

So What?

Regional growth data for the Bay Area shows where competition and opportunities for Marin County may lie in terms of businesses moving out of high-wage areas and also implications on Marin County companies

to find talent. These data may also indicate businesses and industries that demand commercial real estate in Marin County as prices rise in the core Bay Area counties. The shift share analysis in the next section compares the growth of employment in Marin County and the state of California overall over time.

3. Location Quotient Analysis into Shift Share

Location quotients (LQs) are one way of identifying industries as part of the economic base of a region. Table 7 - 26 provides location quotients for industry sectors in Marin County relative to the Bay Area as a whole, California, and the United States. A location quotient indicates whether the local (Marin County) employment percentage is relatively large or small compared to a broader area (California). A value greater than one indicates that the industry share of regional employment is larger in Marin than it is in the Bay Area, California, or the U.S. as a whole.

Of the five industries contributing more than 10% to overall county employment, three of them have location quotients that are substantially greater than one. These are: retail trade, accommodation and food services, and professional, scientific, and technical services (PSTS). PSTS includes legal, accounting, scientific research, technical research and consulting, as well as engineering, architecture and design. Each of these three industry sectors contributes more to employment in Marin County than they do nationally or statewide. Relative to the Bay Area, PSTS is less important to Marin than to other parts of the region.

Personal services include retail trade, food services, education services, real estate, rental and leasing, as well as "other services" (a catch-all for nonprofit organizations and personal services otherwise). These are all sectors of the economy with location quotients one or larger relative to the selected regions. Construction, another industry that is heavily concentrated in Marin County, also has LQs of less than 1.

Table 7 - 26. Industry Concentrations and Location Quotients

2-Digit NAICS	Employment	Location Quotient		
	Share	Bay Area	California	U.S.
Retail Trade	14.18	1.33	1.32	1.24
Health Care & Soc. Asst.	12.98	1.04	1.02	0.99
Accom. & Food Svcs	11.60	1.15	1.27	1.29
Public Admin	10.55	1.13	0.73	0.67
Prof., Sci. & Tech.	10.51	0.87	1.41	1.74
Admin, Support, & Waste	6.41	1.06	0.99	1.02
Construction	5.49	1.13	1.31	1.25
Other Svcs	5.37	1.49	1.71	1.75
Fin & Ins.	4.86	1.47	1.45	1.17
Educ. Services	2.64	1.25	1.28	1.32
Wholesale Trade	2.63	0.69	0.58	0.62
Arts, Ent., & Rec	2.51	1.66	1.47	1.75
Information	2.45	0.59	0.84	1.23
Mgmt of Companies	2.17	0.99	1.53	1.40
RE, Rental, Leasing	2.10	1.21	1.25	1.42
Manufacturing	1.77	0.20	0.23	0.20
Trans. & Ware.	0.74	0.37	0.26	0.23
Other	0.67	1.51	1.46	4.25
Ag, For, Fish, & Hunting	0.35	0.68	0.14	0.40
Utilities	0.02	0.41	0.13	0.04
Mining	0.00	0.00	0.00	0.00

Source: QCEW, Calculations by Marin Economic Consulting

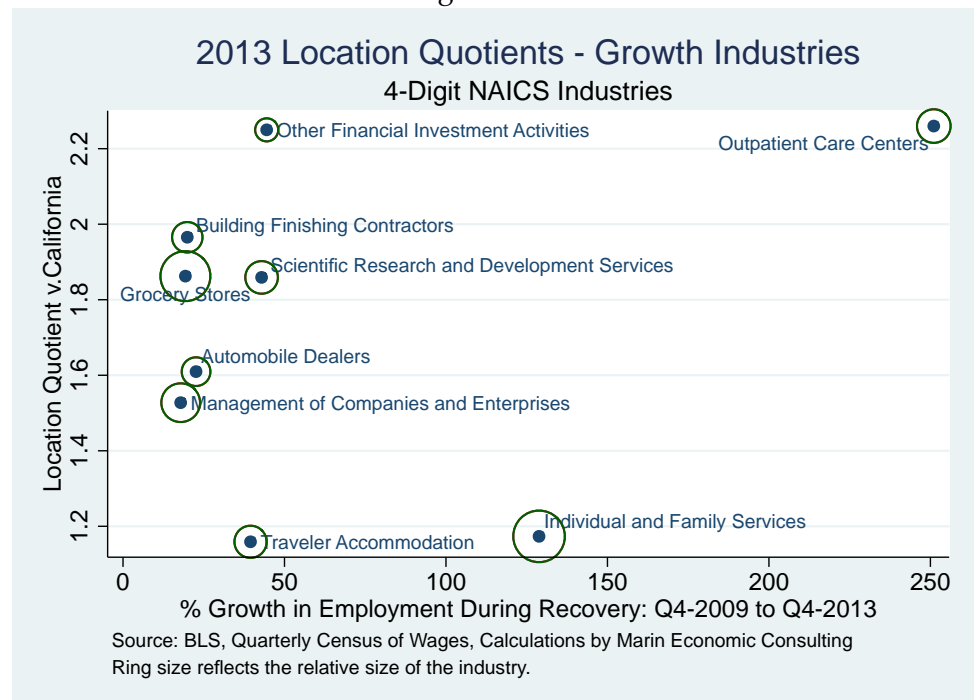
Figure 7-13 presents an indication of more disaggregated sectors of the economy that have grown relatively quickly and are more heavily concentrated (have significantly higher shares of employment) in Marin County than in California otherwise. The fastest growing types of businesses are health-care related services. Another sector with a high share of employment includes other financial investment activities.

Shift share is similar to LQ analyses but looks for

changes over time. The LQ analysis is a snapshot look at industries and relative employment strength in a local area. Shift share looks at how local industries change over time. This analysis includes a comparison of Marin County with California overall. A shift share analysis decomposes industry growth into three distinct parts. These parts are macroeconomic growth, an industrial shift, and a differential shift.

- **Macroeconomic Growth** drives a local economy for reasons beyond its own markets. We will see that construction and real estate, two industries that were seen as targeted industries in 2004, and were deeply affected in the recent recession by macroeconomic forces.
- **Industrial shifts** reflect how the specific industry is growing versus the local economy.¹¹ For example, if life sciences grew through the recent recession such that it outpaced Marin County's growth overall, there would be considered some "proportional" or "industrial" shift toward more life-sciences businesses.
- **Differential shifts** compare the rate of growth of industry employment locally to a comparison economy. For example, while construction contracted locally, this industry also suffered in almost all other Bay Area counties. Some parts of California suffered less than Marin County. This differential shift is the same as the LQ.

Figure 7 - 13



¹¹Table 7 - 27 looks at Marin County's industries and their growth over specific time intervals from 1990 to 2013. These intervals range from the entire, 24-year period to the recent economic recovery period of 2010-2013.

The sum of these three parts is the "shift share" or the evolution of local, comparative advantage by industry. We are comparing changes over time, changes locally to the national economy, and also changes to a reference economy simultaneously, and then splitting those parts to identify the most important.

So What?

The shift share analysis shows that Marin County's competitive advantage, as measured by these three shifts in the Marin County economy relative to California, is heavily skewed to services. These data show the shift of Marin County's economy toward such locally-focused businesses over time. Marin County needs some goods-producing businesses to provide balance and support in the long term, and the base or export-focused jobs show where Marin County may gain economic balance. Table 7-28 provides more data on this split.

4. How many jobs are involved with "export" versus "locally-serving" industries in Marin County?

The economic base data in Table 7-27 show that a mix of health care, food service, construction, finance, and retail have large employment levels in Marin County, but that construction, retail, and education are major "export" industries. An opportunity also exists: for industries that are primarily export-serving industries, a low ratio of base to locally-serving employment suggests there is room to grow export-focused jobs and incomes. Base employment is meant to be an indicator of how much the local economy has jobs that are not reliant on local income and wealth for their growth.

So What?

The base industries of Marin County are skewed toward services, suggesting that many of the "exports" from Marin County are not in what is built in Marin County but who is served. The lack of base employment in accommodation and food services begs a question of how Marin County's hotels and restaurants are a draw for locals versus visitors also. Export-focused industries are attractive to economic development because of their relatively large multiplier effects.

Table 7 - 27: Shift Share Data, Marin County, 2004 to 2013 as compared to California

Proportional	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total-Private Industry	-1.4%	-4.2%	-2.0%	-7.3%	-2.3%	-5.9%	-10.2%	-7.4%	-6.5%	-7.4%
Agriculture	2.5%	2.7%	0.1%	-28.3%	-21.8%	-18.8%	-31.2%	-29.9%	-40.0%	-41.5%
Construction	1.4%	0.7%	-5.1%	-5.5%	-5.4%	-24.0%	-32.7%	-31.1%	-34.1%	-37.2%
Wholesale Trade	-4.0%	-12.2%	-5.3%	-10.0%	-7.5%	-15.5%	-17.3%	-13.4%	-9.0%	-9.7%
Information	-2.3%	-3.4%	-3.5%	-35.5%	-34.9%	-34.2%	-45.3%	-19.2%	-17.6%	-21.5%
Finance and Insurance	-5.1%	-7.8%	-6.5%	-13.8%	-21.5%	-23.3%	-31.9%	-28.3%	-27.9%	-31.2%
Real Estate and Rental and Leasing	1.2%	-3.0%	-2.0%	-11.0%	-3.0%	-6.3%	-23.1%	-18.6%	-24.7%	-25.2%
Professional, Scientific, and Technical Services	7.0%	8.0%	15.7%	9.0%	20.0%	13.0%	12.1%	5.8%	5.5%	2.5%
Management of Companies	-3.0%	8.4%	13.8%	4.3%	5.6%	-1.5%	0.5%	6.8%	12.3%	7.0%
Admin and Waste Management	4.4%	-9.4%	-0.8%	1.1%	8.0%	0.5%	-2.9%	-3.0%	0.7%	3.3%
Educational Services	4.9%	2.9%	4.2%	6.0%	13.4%	17.2%	13.1%	19.7%	28.9%	24.0%
Health Care and Social Assistance	-2.4%	-3.8%	0.1%	-5.8%	1.4%	8.7%	3.8%	5.8%	5.2%	16.9%
Arts, Entertainment, and Recreation	-5.2%	-8.9%	-8.9%	-4.3%	4.7%	4.6%	-8.2%	-4.7%	-8.5%	-11.0%
Accommodation and Food Services	-4.8%	-6.8%	-3.2%	-6.8%	-0.3%	-3.3%	-8.0%	1.0%	6.6%	8.3%
Other Services (not including government)	1.4%	-4.1%	1.0%	-2.5%	2.0%	2.7%	5.3%	2.6%	9.7%	-12.1%
Manufacturing	-18.0%	-25.3%	-26.0%	-39.2%	-34.3%	-34.2%	-35.8%	-38.0%	-36.7%	-30.6%
Retail Trade	-3.4%	-6.7%	-7.6%	-10.8%	-8.1%	-13.3%	-14.2%	-11.9%	-13.1%	-15.4%
Transportation and Warehousing	-3.0%	-3.3%	-9.9%	-20.2%	-19.1%	-29.7%	-29.2%	-20.6%	-19.8%	-24.8%
Differential										
Total-Private Industry	-1.4%	-4.2%	-6.1%	-7.3%	-5.8%	-5.9%	-5.7%	-7.4%	-7.1%	-7.4%
Agriculture	5.9%	5.4%	1.1%	-24.2%	-19.5%	-19.5%	-31.2%	-34.3%	-44.3%	-45.1%
Construction	-5.1%	-10.6%	-22.3%	-12.5%	-3.9%	-4.7%	-2.2%	-3.7%	-7.6%	-12.7%
Wholesale Trade	-3.4%	-12.7%	-12.3%	-14.7%	-15.3%	-17.4%	-15.4%	-16.4%	-12.0%	-12.1%
Information	-3.3%	0.5%	-1.8%	-29.1%	-32.7%	-29.1%	-33.7%	-10.6%	-7.2%	-10.3%
Finance and Insurance	-5.2%	-9.3%	-10.7%	-8.7%	-13.9%	-13.6%	-14.2%	-13.7%	-12.1%	-11.4%
Real Estate and Rental and Leasing	1.3%	-3.3%	-6.8%	-8.1%	-2.3%	-1.5%	-12.3%	-10.0%	-14.9%	-14.2%
Professional, Scientific, and Technical Services	8.1%	6.0%	5.0%	-1.2%	2.7%	-0.2%	1.7%	-11.4%	-14.3%	-17.4%
Management of Companies	6.8%	24.6%	31.9%	29.7%	26.5%	19.2%	26.6%	27.9%	34.3%	27.1%
Admin and Waste Management	5.0%	-8.6%	-6.0%	0.7%	7.8%	8.5%	7.0%	1.7%	2.4%	3.7%
Educational Services	4.0%	0.9%	-3.4%	-1.3%	-4.8%	-7.3%	-5.1%	-11.0%	-4.8%	-7.5%
Health Care and Social Assistance	-2.2%	-2.5%	-3.2%	-7.5%	-8.2%	-6.3%	-10.5%	-13.4%	-14.4%	-30.6%
Arts, Entertainment, and Recreation	-4.4%	-6.1%	-11.2%	-4.3%	-1.4%	-0.7%	-10.5%	-10.7%	-15.6%	-18.6%
Accommodation and Food Services	-6.2%	-9.0%	-11.3%	-12.7%	-11.6%	-12.9%	-14.3%	-10.5%	-7.0%	-7.0%
Other Services (not including government)	-1.2%	-7.6%	-7.0%	-8.3%	-11.9%	-14.8%	-5.5%	-11.7%	-14.4%	18.1%
Manufacturing	-15.7%	-19.7%	-22.2%	-27.8%	-25.3%	-19.4%	-15.0%	-20.3%	-16.7%	-6.6%
Retail Trade	-3.6%	-7.1%	-11.9%	-10.5%	-9.7%	-10.5%	-7.7%	-9.5%	-10.2%	-10.5%
Transportation and Warehousing	-2.5%	-1.6%	-12.1%	-19.5%	-23.7%	-30.0%	-24.7%	-20.3%	-19.4%	-24.6%
Shift Share										
Total-Private Industry	-2.8%	-9.2%	-8.7%	-15.7%	-9.1%	-19.7%	-24.9%	-23.6%	-18.9%	-17.0%
Agriculture	12.1%	14.2%	2.7%	-74.6%	-66.6%	-59.0%	-92.4%	-95.6%	-123.0%	-122.8%
Construction	-1.0%	-5.8%	-31.1%	-17.3%	-13.4%	-54.6%	-66.2%	-67.3%	-74.4%	-81.9%
Wholesale Trade	-10.1%	-33.6%	-21.5%	-28.4%	-28.9%	-50.4%	-48.6%	-44.7%	-28.8%	-26.2%
Information	-6.7%	-2.8%	-7.5%	-93.8%	-101.2%	-99.6%	-122.9%	-50.4%	-41.2%	-48.0%
Finance and Insurance	-14.2%	-21.4%	-22.4%	-30.1%	-55.6%	-62.0%	-76.7%	-71.8%	-66.5%	-68.5%
Real Estate and Rental and Leasing	5.0%	-5.9%	-9.5%	-23.9%	-6.9%	-16.0%	-57.2%	-48.7%	-63.0%	-59.4%
Professional, Scientific, and Technical Services	23.5%	25.4%	37.8%	23.0%	43.9%	24.0%	27.2%	-1.3%	-1.9%	-7.1%
Management of Companies	2.1%	44.9%	60.7%	44.6%	39.1%	14.3%	29.0%	40.1%	60.2%	46.5%
Admin and Waste Management	15.1%	-23.8%	-6.3%	9.1%	25.2%	7.6%	2.5%	-5.7%	5.0%	15.6%
Educational Services	15.1%	10.3%	6.3%	16.9%	23.3%	25.2%	22.4%	27.0%	54.4%	45.8%
Health Care and Social Assistance	-5.6%	-6.8%	-1.6%	-13.0%	-4.1%	9.2%	-1.6%	-3.2%	-2.7%	8.5%
Arts, Entertainment, and Recreation	-13.5%	-20.4%	-27.6%	-6.8%	9.3%	6.6%	-25.6%	-21.5%	-31.3%	-35.3%
Accommodation and Food Services	-14.5%	-19.2%	-16.4%	-20.0%	-10.9%	-21.4%	-29.0%	-9.9%	7.4%	14.8%
Other Services (not including government)	2.9%	-12.4%	-3.8%	-7.1%	-6.5%	-11.3%	6.4%	-8.0%	6.3%	-0.7%
Manufacturing	-50.4%	-66.9%	-72.8%	-100.0%	-92.5%	-89.6%	-85.3%	-97.8%	-88.7%	-62.5%
Retail Trade	-9.0%	-17.2%	-25.9%	-25.9%	-24.5%	-39.1%	-34.7%	-34.8%	-35.1%	-35.9%
Transportation and Warehousing	-7.2%	-4.7%	-30.6%	-53.6%	-60.6%	-91.4%	-81.7%	-62.9%	-57.7%	-68.9%

Sources: California EDD and Marin Economic Forum

5. How many additional jobs and income dollars does Marin County get for one industry job?

The multiplier effects of an industry on both jobs and business incomes can be blessings and a curse. Economic development efforts generally seek industries that provide a "bang for buck" or growth for the local economy. For slow-moving, high-unemployment economies, industries that provide a large number of jobs

and larger amounts of business income through supply-chain links locally can provide long-term foundations for economic prosperity. In economies such as Marin County, industries that have large multiplier effects need to be assessed with other constraints and considerations. Residential and commercial real estate may not exist to support growth of some industries locally, and thus local growth relies on a regional network of infrastructure (transportation, housing, commercial space) to thrive.

Like dropping a rock into a pond, an industry's expansion has ripple effects on a local economy and beyond based on new jobs created. This model has three impact classifications, summing to a total effect. The direct effects are those specific to the event. For example, hiring for construction jobs generates an economic effect on local employment, tax and business revenues. Indirect effects come from new incomes earned by construction workers spending a portion of that money on other businesses' goods and services, including the purchase of raw materials from local wholesalers and retailers. These revenues flow to other businesses and lead to more employment, wages, revenue, and taxes for merchants throughout Marin County. When a newly-hired plumber goes out to eat at a restaurant in Marin County, there are indirect effects from original construction spending. These additional jobs and revenues then create induced effects.

The induced effects are similar to the indirect effects, but come from indirectly-affected workers and firms and their economic gains, as well as new households that spend on a variety of businesses. For example, a new linen-service worker, hired due to the restaurant's expansion during a construction effort, may go to the grocery store or the doctor's office more often, which induces growth in local business revenues, employment and taxes. The sum of these effects is the total or overall economic impacts. The tables below are split into such categories, where the top-ten industries affected are shown explicitly beyond the directly-affected industries.

So What?

It is important, for the balance of the local economy, to have some high-growth, high-potential businesses always in some quantity. The multiplier effects work through the supply chain links (indirect and induced effects). As businesses and employees are provided more income and wages by local economic growth, they also spend more on their supply chains to satiate demand.

To provide a look at what industries provide relatively larger growth of business income and employment over others, Table 7 - 29 provide these details at the NAICS-3 and NAICS-2 digit levels respectively on average for businesses within those industry sectors.

6. Are there current efforts underway to support the industry's growth?

Marin County, as of July 2015, has the following efforts underway that support specific industries and infrastructure.

Marin Market

This is an expansion of the current Marin Farmers Market at the Civic Center in San Rafael. The county seat is adjacent to this area. The Marin Market is meant to be a place for food systems education, an expansion of how farmers and other food and product producers can sell their products in one place and supported by parking and a transportation hub with SMART. This is part of the agricultural supply chain, and vertically integrates Marin County's agricultural sector and regional farming. This marketplace will provide infrastructure that supports farmers, artists and other businesses in Marin County. See www.agriculturalinstitute.org for more.

North Bay Life Science Alliance

In 2012, an effort to use the Buck Institute for Aging Research in Novato as a hub for life-sciences business activity began. This effort focused on aligning and growing business in biotechnology, pharmaceutical research, design and manufacturing, and other variants of the life-sciences industry. Marin County is in a position where there are growing industry clusters (and supported industry clusters) to the north (Sonoma County in medical devices) and east (Solano County has animal and plant science and pharmaceutical research and manufacturing at a Genetech campus), and also a global center for life sciences in the San Francisco Bay Area to the south (see the California Life Sciences Association or CLSA at <http://califesciences.org/>). In 2014, the North Bay Life Sciences Alliance was established to facilitate life sciences businesses considering and coming to Marin County to operate. It is a partnership among the City of Novato, Marin Economic Forum, the Buck Institute for Aging Research, and other, regional organizations. See www.nblsa.com for more.

Destination Management and The Marin Center

The Marin Center is a municipal theater, open area and fairgrounds space that acts as the largest event space in Marin County. The Golden Gate National Recreation Area (GGNRA) has stated that there are almost 3 million people per year that visit southwestern Marin County (see earlier section on "Geography" for more information). Sonoma and Napa counties draw in over \$1.6 billion and \$1.2 billion respectively from global visitors for wine-related tourism and other activities.¹² The Bay Area (San Francisco and San Mateo counties) is a gateway to millions of pleasure and business tourists annually. In 2014, San Francisco County generates over \$11 billion in visitor-related revenue for county businesses; the international airport (SFO) is in San Mateo County, and San Mateo County derives \$3.2 billion in visitor expenses with over \$718 million from

¹²The economic data on travel and tourism provided here comes from the 2015 report by Dean Runyan Associates <http://www.deanrunyan.com/CATravelImpacts/CATravelImpacts.html>.

air travel spending alone out of SFO in 2014. Marin County generated approximately \$834 million in visitor spending in 2014.

So What?

Linking agriculture and Marin County farmers to provide better economic opportunities is essential to help preserve current farmland as working ranches and to link local food sources to local retail markets. The Marin Market expands the idea of a farmer's market to become an educational center on the use of open space, water and food systems, and the importance of local agriculture in healthy communities.

Visitors act as export income for any local area, and a group to be managed in terms of conversion to overnight stays, having complementary services to reduce potential leakages, and to be in step with local neighborhood and business concerns with respect to where visitors enter Marin County and its economic, social and environmental lives. This is a major economic development area to come.

Life sciences industries have the demography, geography and economics to grow and thrive in Marin County. There are many businesses already in Marin County and growing daily. Much of this growth is tied directly or indirectly to academic research and resources that may be needed to support this industry's growth.

It is important to see this sixth criterion in the context of the first five. Because economic growth brings opportunity costs, such as rising wages, lower commercial vacancies, more traffic, and rising home prices, there will be political issues as industries grow. When targeted industries are supported by ongoing public relations and community development efforts, it is easier to support local growth of such industries. The final criterion asks about infrastructure support.

7. Will the industry be supported by local residents, businesses and infrastructure?

There is a final criterion and question: will growth of certain industries be supported by Marin County residents and current businesses? Residents and business compete with each other for land, parking, space on our roadways, customers, business opportunities, and political support. Commercial real estate owners, locally-elected officials, local businesses and residents all need to find ways of co-existing and taking advantage of market trends. The socio-political environment in Marin County will likely accept business growth that balances the costs of growth, knowing these costs are beset by benefits:

1. Reduced traffic conditions;
2. Sustainable growth in visitors coming to Marin County, specifically in West Marin's agricultural areas;
3. Rising wage environments that are reflective of regional markets;
4. Local support for local businesses; and
5. More housing units that are a mix of affordable (specific to Marin County business' employees) and market rate (planning for growth).

Notice there are some contradictions in achieving all of these goals simultaneously. Further, not all groups in Marin County want all these goals to be achieved. For example, local workers would want rising wages. The living-wage experiments in Oakland and San Francisco starting in 2015 make for rising-wage competitiveness regionally and will likely force wages up in Marin County. Local residents will likely applaud rising wages less once businesses react to rising wages; businesses will face rising costs and more competitive hiring environments as a result.

So What?

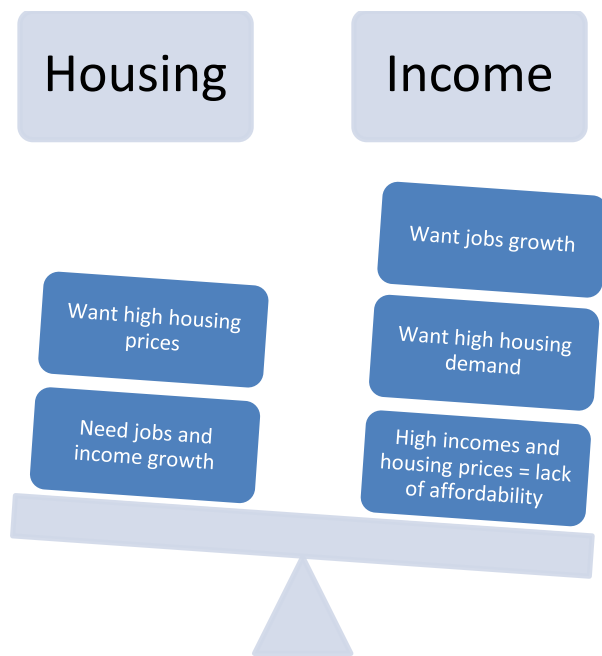
One of the largest challenges to face Marin County in the next five years is the growth of business in a social and political environment where rising housing costs, slow-moving wages, and more traffic on major roadways and rural streets are daily concerns. The importance of community building in economic development and having local chambers of commerce, local businesses, and elected officials all rally around a common vision is an intended outcome of this study. For those involved in workforce development and training, one of the major challenges will be to provide ways for lower-income workers to rise to other positions will filling the demand for lower-wage, service positions that may not be able to live locally and face rising commute times and costs. These tradeoffs are challenges to how industry are targeted, the role of workforce development and training, and where housing and commuting costs all intersect. Community development anywhere in the Bay Area struggles with such balancing.

8. Choosing the Targeted Industries

Using the data above, and some qualitative assumptions from current economic and workforce development efforts regionally, we determined a list of targeted industries. Choosing targeted industries should also match regional politics and infrastructure (see Table 7 - 30).

In the 2004 targeted industries study by Economic Competitiveness Group for Marin County, one of the targeted industries was the "built environment" where construction and renovation were major components of growth for Marin County.¹³ By 2007, the construction industry had begun to slow down quickly as housing markets began to turn downward in price, undermining the original industry's growth projections. ECG's

Figure 7 - 14:
Community Development Tradeoffs



¹³see <http://www.marineconomicforum.org/resources/reports/> for the 2004 TIS.

data and analyses were reasonable, and few economists foresaw the magnitude of change that came to housing and financial markets in 2008. It is critical to foresee the economic, social and environmental angles on a growing industry if possible.

By these criteria, we identify a set of industries as target industries for Marin County. This is a list of targeted industries based on these criteria and other data in Marin County, the Bay Area and California. To understand the process, consider the life sciences industry, one of the targeted industries below. The reasoning behind its inclusion is based on the following logic:

- Recent growth in Marin County in terms of new jobs;
- Regional and global growth of similar industries in place;
- Shift Share analysis points toward scientific research as an industry of rising competitive advantage in Marin County;
- Export-focused jobs in Marin County with markets around the world;
- Large multiplier effects;
- Regional economic development effort with a funded marketing strategy and plan; and
- Commercial real estate and education institutions to support these businesses.

It is tempting to drill down to the "job" level, where we can compare business to business (architecture firm to engineering firm, for example), but the available data do not allow an easy way to do such an analysis. Most economists use the NAICS-2 (industry sector) and NAICS-3 (industry) levels to look at location quotients, shift share, and industries to recommend as targets for regional economic development. Any lower scale of data begins to lose observations due to data confidentiality issues.

Table 7 - 28. Economic Base Employment Data, Q2 2014

NAICS 3 Code	Industry	Total Jobs	Base	Local Serving
	Totals	94,838	18,298	76,540
722	Food Services and Drinking Places	10,823	1,780	9,043
541	Professional and Technical Services	9,884	2,070	7,814
621	Ambulatory Health Care Services	5,894	830	5,064
561	Administrative and Support Services	5,676	-	5,676
624	Social Assistance	5,608	810	4,798
445	Food and Beverage Stores	3,920	1,423	2,497
611	Educational Services	3,663	1,333	2,330
238	Specialty Trade Contractors	3,168	104	3,064
623	Nursing and Residential Care Facilities	2,934	984	1,950
236	Construction of Buildings	2,366	1,221	1,145
551	Management of Companies and Enterprises	2,147	619	1,528
524	Insurance Carriers & Related Activities	2,063	884	1,179
713	Amusement, Gambling & Recreation Ind	2,048	623	1,425
531	Real Estate	1,914	476	1,438
813	Membership Organizations & Associations	1,879	860	1,019
452	General Merchandise Stores	1,757	-	1,757
441	Motor Vehicle and Parts Dealers	1,589	200	1,389
721	Accommodation	1,535	62	1,473
812	Personal and Laundry Services	1,534	302	1,232
522	Credit Intermediation & Related Activity	1,499	-	1,499
325	Chemical Manufacturing	1,469	-	1,469
811	Repair and Maintenance	1,466	349	1,117
622	Hospitals	1,329	-	1,329
423	Merchant Wholesalers, Durable Goods	1,310	-	1,310
511	Publishing Industries	1,156	570	586
523	Financial Investment & Related Activity	1,141	511	630
444	Building Material & Garden Supply Stores	1,082	226	856
453	Miscellaneous Store Retailers	1,080	381	699
424	Merchant Wholesalers, Nondurable Goods	1,048	-	1,048
448	Clothing and Clothing Accessories Stores	1,016	-	1,016
446	Health and Personal Care Stores	896	117	779
442	Furniture and Home Furnishings Stores	785	420	365
451	Sporting Goods/Hobby/Book/Music Stores	783	325	458
814	Private Households	710	455	255
311	Food Manufacturing	640	-	640
443	Electronics and Appliance Stores	513	70	443
711	Performing Arts and Spectator Sports	504	32	472
512	Motion Picture & Sound Recording Ind	482	-	482
562	Waste Management and Remediation Service	436	97	339
237	Heavy and Civil Engineering Construction	395	-	395
425	Electronic Markets and Agents/Brokers	375	-	375
454	Nonstore Retailers	345	48	297
327	Nonmetallic Mineral Product Mfg	285	65	220
447	Gasoline Stations	263	-	263
484	Truck Transportation	262	-	262
517	Telecommunications	250	-	250
519	Other Information Services	244	-	244
492	Couriers and Messengers	241	-	241
515	Broadcasting (except Internet)	238	-	238
518	ISPs, Search Portals, & Data Processing	216	-	216
485	Transit and Ground Passenger Transport	210	-	210
488	Support Activities for Transportation	189	-	189
712	Museums, Parks and Historical Sites	175	38	137
111	Crop Production	162	-	162
112	Animal Production and Aquaculture	149	-	149
334	Computer and Electronic Product Mfg	146	-	146
315	Apparel Manufacturing	109	-	109
323	Printing and Related Support Activities	109	-	109
115	Agriculture & Forestry Support Activity	102	-	102
332	Fabricated Metal Product Manufacturing	102	-	102
312	Beverage & Tobacco Product Manufacturing	89	-	89
337	Furniture and Related Product Mfg	87	-	87
339	Miscellaneous Manufacturing	79	-	79
333	Machinery Manufacturing	75	-	75
336	Transportation Equipment Manufacturing	68	-	68
487	Scenic and Sightseeing Transportation	34	-	34
314	Textile Product Mills	29	-	29
326	Plastics & Rubber Products Manufacturing	28	-	28
525	Funds, Trusts & Other Financial Vehicles	16	13	3
493	Warehousing and Storage	12	-	12
321	Wood Product Manufacturing	7	-	7

Sources: California EDD, Bureau Of Labor Statistics (QCEW Data), Calculations by Marin Economic Forum

Table 7-29: Industry Revenue Multipliers, Marin County

NAICS 2	Industry	Multipliers	
		Income	Jobs
11	Agriculture, Forestry, Fishing and Hunting	1.497	1.681
21	Mining	1.494	1.526
22	Utilities	1.326	2.474
23	Construction	1.534	1.629
31	Non-Durable Manu	1.388	1.826
32	Advanced Manu	1.439	2.144
33	Heavy Manu	1.393	1.716
42	Wholesale Trade	1.456	1.564
44	Retail	1.604	1.502
45	Retail	1.565	1.250
48	Transport	1.522	1.826
49	Logistics	1.536	1.334
51	Information	1.588	2.407
52	Finance and Insurance	1.782	2.418
53	Real Estate and Rental and Leasing	1.434	2.059
54	Professional, Scientific, and Technical Services	1.612	1.600
55	Management of Companies and Enterprises	1.740	2.074
56	Administrative and Support and Waste Management and Rem	1.641	1.462
61	Educational Services	1.792	1.354
62	Health Care and Social Assistance	1.677	1.448
71	Arts, Entertainment, and Recreation	1.673	1.415
72	Accommodation and Food Services	1.615	1.388
81	Other Services (except Public Administration)	1.693	1.539

Source: IMPLAN and Marin Economic Forum

Table 7 - 30. Targeted Industries Criteria, Marin County

NAICS-2	Industry or Sector	Weighted Average								Criteria
			Fast Growth?	Regional Growth?	Shift Share?	Base Jobs?	Large Multiplier?	Econ Dev Efforts?	Infrastructure Support?	
11	Agriculture, Forestry, Fishing & Hunting	0.71	0	1	1	0	1	1	1	
21	Mining	0.43	0	1	1	0	1	0	0	
22	Utilities	0.57	0	1	1	0	1	1	0	
23	Construction	0.57	0	0	0	1	1	1	1	
31	Non-durable Manufacturing	0.43	0	1	0	0	1	0	1	
32	Intermediate Manufacturing	0.43	0	1	0	0	1	1	0	
33	Equipment and Heavy Manufacturing	0.29	0	1	0	0	1	0	0	
42	Wholesale Trade	0.57	0	1	0	1	1	0	1	
44	Specific Retail Trade	0.43	0	0	0	0	1	1	1	
45	General Retail Trade	0.29	0	0	0	0	1	0	1	
48	Transportation	0.57	0	1	0	0	1	1	1	
49	Warehousing	0.29	0	1	0	0	1	0	0	
51	Information	0.43	0	1	0	0	1	0	1	
52	Finance and Insurance	0.29	0	0	0	0	1	0	1	
53	Real Estate and Rental and Leasing	0.43	0	0	0	0	1	1	1	
54	Professional and Technical Services	0.57	1	0	1	0	0	1	1	
55	Management of Companies and Enterprises	0.71	1	1	1	1	0	0	1	
56	Administrative and Waste Services	0.57	1	1	1	0	0	0	1	
61	Educational Services	0.71	1	1	1	0	0	1	1	
62	Health Care and Social Assistance	0.71	1	1	1	0	0	1	1	
71	Arts, Entertainment, and Recreation	0.43	1	0	0	0	0	1	1	
72	Accommodation and Food Services	0.71	1	1	1	0	0	1	1	
81	Other Services, Ex. Public Admin	0.57	1	0	1	0	0	1	1	

Source: EDD, Marin Economic Forum, Marin Economic Consulting

Targeted Industries 2015-2020, Marin County

Sector	Agriculture	Specialty Manufacturing	Research and Design	Wellness	Education
<i>Industries</i>	Support Services	Food and Beverage	Life Sciences	Tourism Support	Non-profits focused on education
	Logistics	Specialty Manufacturing	Environmental Sciences	Outpatient health care	Colleges and Universities
			Mobile Technology	Residential Care (links to construction)	

8. CEDS Goals

Given the economics and demography of Marin County, we now consider broader goals for Marin County over the next five years. These goals are parallel to six focus-group sessions hosted by Marin Economic Forum, which helped gather community input on each goal beyond MEF's board members.

The goals discussed below are focused on infrastructure and workforce development. They include the following seven goals:

1. Support and Grow Jobs and Businesses in the Targeted Industries;
2. Wireless Access and Broadband Expansion;
3. Expansion of Tourism in a Sustainable Way for Marin County's communities;
4. Preservation of Natural Resources and Open Space;
5. Education and Workforce Development Enhancement;
6. Housing and Transportation Planning and Connections; and
7. Supporting and Expanding the County's Social Safety Net.

Infrastructure will be needed to support these seven goals, whether it is roadways, school buildings, cell-phone towers, water-capture facilities, new homes, critical-care facilities, senior housing with residential care, expanded ferry service, and other needs. There are links among these items and also to the broader economy. In each of the subsections below, the qualitative feedback on each goal provides policy makers using this document with some thoughts about how to focus financial support and time in achieving these goals. The qualitative data gathered from our focus groups provide ways to consider some measurable outcomes of pursuing the goals above.

Broadband and Wireless Access

During this focus group, we asked four questions about wireless and broadband, their role in the local economy, and if Marin County's rural areas were specifically where more broadband and wireless would help provide more support for visitors and the agricultural communities. The following ideas were some simple conclusions from that group.

What are four goals of expanding wireless and fixed broadband options specific to West Marin?

- To improve quality of life for individuals in West Marin;
- Engaging and improving governmental services;
- Improve businesses ability to compete; and
- Meets the needs for today and tomorrow.

Why would local businesses need faster-speed wireless or fixed broadband access?

- All business sectors need broadband access, including telecommuters;
- Need to keep up with evolving business needs;
- Need for productivity; and
- Need for broadband to stay competitive.

What are actions or strategies to stimulate expansion of wireless and fixed broadband in Marin County?

- Engage customers to define their needs;
- Work as partner with broadband partners instead of taking an adversarial position;
- Strategies for funding;
- Provide research/conduct research; and
- Create more infrastructure, including wireless access and gigabit- and enhanced-fiber broadband.

What can local government do to help expand wireless and fixed broadband as partners?

- Set policy goals;
- Establish governmental structure;
- Oversee infrastructure and right of way reform;
- Regulate cost and incentives;
- Management of Infrastructure information.

High-speed Internet access is, like other infrastructure, something that literally ties residents and businesses together. High-speed wireless specifically can help support Marin County as a destination for business and also recreational visitors by reaching more difficult locations, support more conferences (business visitors) and general visitors. From local agriculture to governments, such access is a primary business need.

Destination Management

Managing Marin County as a destination is a goal where infrastructure plays a major role. Because Marin County has a unique, central location among major tourism areas, one focal industry for economic development is visitor services businesses. because of the juxtaposition between visitors and residents, "destination management" is a must. To further investigate the infrastructure and economic development needs of this industry, Marin Economic Forum asked for community participation in a focus group on the following questions.

What are infrastructure needs to help support or expand Marin County tourism?

- Transportation: getting visitors around Marin County quickly, efficiently, and as environmentally sound as possible;
- Attractions: preserve those iconic to Marin County;
- Jurisdictional coordination between cities and county; and
- Facilities (for visitors): expanded infrastructure to help visitors and not infringe on residents.

What are the largest challenges to supporting or expanding Marin County tourism?

- Marketing: local or regional market niche needs to be established;
- Politics and Policy: community education and commitment to visitors helping Marin County;
- Transportation: difficult to connect all the transportation needs; and
- Funding: resources to fund augmented infrastructure.

What information do we want to find out about visitors in Marin County?

- How much do tourists spend?
- Where do tourists go?
- Who are the tourists (demographically)?
- What improvements are needed and where?
- How do tourists find out about Marin?
- Where do tourists come from?
- Will tourists come back to Marin?
- Community: attitudes, behavior, and knowledge from survey data.

In what ways can more overnight visitors be attracted from the natural flows through Marin County on their way to other destinations?

- Improve Marin Center as an actual destination;
- Create unified marketing and economic development programs;
- Increase and consolidate agriculture (and related industries) focus along with beer and wine;
- Better highlight existing products and events and attractions unique to Marin; and

- More focus on active sports, mountain biking, skating, water (kayaking, etc.).

Managing a destination means managing local assets that help support visitors, workers in these industries, local residents, and the lands used during tourism visits. Agriculture and open space has a long history in Marin County; the county's western and coastal areas are a major draw and provide some industrial balance for the county economy in terms of local food and manufacturing.

Natural Resources and Open Space

There are infrastructure needs to access and support those that come to Marin County to do business with local farmers and ranchers, but also to access our wetlands, coastlines, and other preserved spaces that draw visitors. Open-space preservation and destination management strategies are connected; infrastructure that benefits one aspect of the economy must benefit the sustainability of Marin County's natural resources.

This issue goes beyond open space, however. Marin County is a community that has sought water and energy independence for many decades. An organization called Marin Clean Energy (see www.mcecleaseenergy.org for more) is a joint powers authority that seeks to find renewable energy sources and sell that energy to customers in the Bay Area, with a specific focus on Marin County. Energy independence efforts have expanded in terms of installing and using more solar and wind energy.

Some want to pursue desalinization. Water resources are an issue in Marin County because of where Marin County has historically sourced the county's local water. Sonoma and Mendocino counties, two counties to the north of Marin County, are major sources of Marin County's water resources. There has been discussion of expanding water capture infrastructure and other methods to augment local sources of water and reclamation efforts with drought conditions worsening since 2011.

Marin Economic Forum held a focus group on natural resources in Marin County, and asked members of the public to join us in answering four questions. Those questions and answers are below, which help further inform these issues:

What are four goals to become more water independent in Marin County?

- Infrastructure:
- Water collection;
 - Distribution (stop leaks);
 - Grey Water;
 - Desalination;
 - Measurement (Smart Meters)
- Landscaping incentives to reduce water use;
 - Laws and Planning

- Create water-rate structures that focus on long-term supply portfolio;
- Make water conservation part of all new buildings or retrofits; and
- Education and Conservation: changing behavior on consumer side.

What are four goals to become more energy independent here in Marin County?

- Infrastructure
 - More solar and wind;
 - Expand reach of MCE;
- Government
 - Focus on regional resources, not just local;
 - Assemble a 10-year, energy independence plan and execute it;
- Conservation/education
 - Re-educate about benefits of conservation;
 - Add to local schools as explicit part of curriculum;

What are actions local businesses can take to support Marin's water and energy independence?

- Cultural Change: educate and expand on "Green Businesses";
- Infrastructure: increased efficiency and reuse policies needed;
- Regulatory
 - Create more or larger tax incentives for conservation and efficiency;
 - Encourage more local shopping and communities;

What are four infrastructure changes that would help to preserve or conserve Marin County's natural resources?

- Legal Structure: retain core of CEQA during a time of CEQA reform;
- Transportation System: need more ways to reduce auto traffic and encourage biking and walking;
- Efficiency (energy and water)
 - Support gray water utilization;
 - Programs to detect and fix all leaks and losses from system;
 - Provide incentives for better technology in homes;
- Landscape Management
 - Make user rewards for changing landscape and tie directly to billing;
 - Create a better carbon vegetation structure for carbon capture;
- Education and Funding
 - Create funding for change over to more efficient water and energy systems; and
 - Provide visuals of what the region may look like in 25 and 50 years with sea-level rise and how Marin County will be impacted economically.

The use of natural resources and how those natural resources, specifically water, interact with Marin County's open spaces to provide a broader market place to assist local residents, workers, visitors, and businesses. Notice a large part of the stated answers from this focus group were connected to education. Education and workforce development is a major area for planning and consideration in any area.

Education and Workforce Development

Education and workforce development can be seen as two parts of local support for job seekers, or a pipeline from earning an education at various levels of schooling to moving into the workforce or making a career transition due to an economic downturn or a personal desire to do so. In early 2015, Marin Economic Forum held a focus group on needs in Marin County with respect to both education and workforce development. Specifically, we asked about the confluence of infrastructure use and education needs also. The discussions are summarized below.

What are critical needs for K-12 education as related to workforce development in Marin County?

- Early Childhood Education: as prep for K-3;
- 21st Century Skill Development: make sure education is relevant;
- Technology Training: are the teachers on the technology frontier?
- Business Partnerships with Schools: more links;
- Learn Soft Skills: financial literacy, public speaking, training in trades and for college work, etc.;
- Global Learning: exposure through travel and cultural immersion; and
- Occupational Training and Development: more depth in preparing for either college or vocation.

What are the most critical needs for educational/workforce development infrastructure in the next five years (K – Graduate School)?

- Housing: need more student housing;
- Transportation: easier and more complete links to all Bay Area educational institutions;
- Facilities: need more classrooms and training spaces;
- Overall Organization: Businesses can help educators know what they need (skills vs. knowledge, both today and on the horizon), and if they are finding those skills and expertise in local employees;
- Sharing Resources;
- Mentors: need to develop more networks for students;
- Student facility and peer to peer mentoring; and
- Wages: need higher wages to support rationale for education and workforce development.

What are critical needs for adult workforce development in Marin County?

- Clarity and communication on both business and workforce needs;

- Internships;
- Older Adult Training-Tech Training;
- Transportation: ease of getting to and from work;
- Access and Programming for Higher Education;
- Business Engagement: programs started by businesses;
- Child Care: recognizing the needs of families who work;
- Housing: stable housing means stable adult workers; and
- ESL: have enough programs and opportunities for non-English speakers to learn enough English to participate successfully in the labor market.

What demographic groups will need the most focus for education and workforce development resources in Marin County through 2020?

- Non-English speaking and English learning residents;
- Older Adults-Second Career;
- Underserved populations: Disabled, ex-offenders, homeless, High School-College Drop-outs;
- Small Business Entrepreneurs; and
- Women: both seeking to start a business or moms that now want to go back to work.

Workforce development and jobs expansion affects the use of housing and transportation infrastructure. As discussed earlier, there is an expanding array of transportation options in Marin County, but many of Marin County's workers come as single-occupancy vehicle drivers rather than in a more-efficient method. The balancing act between developing higher-skilled workers, incomes rising and the ability to live where you work are not necessarily supportive of one another. The next section looks at the qualitative aspects of housing and transportation.

Housing and Transportation

Housing markets have rebounded since 2012 and now loss of housing wealth between 2007 and 2011 has given way to a lack of affordability. Also, due to both job growth and the Bay Area economy's expansion, Marin County has seen its unemployment rate dip below 4 percent; traffic has increased pressure on local transportation systems moving in all directions. There is a natural connection between housing and transportation infrastructure. The questions asked of this focus group reflected some of those connections.

Housing Goals: What four goals should additional housing accomplish in Marin County?

- Create a spectrum of housing options (e.g. junior-second units; regular-second units; apartment, condominiums; co-housing and single-family homes) to meet various life cycles;
- Workforce housing to better match what our employees can afford;

- Focus new and infill housing in our downtowns to: increase vibrancy; support local businesses; create a greater sense of community; preserving outlying open space, or existing single-family home neighborhoods; and
- Environmentally efficient; remodels and new housing- context sensitive and human scaled; enhancing character of built environment (e.g. form based codes); streamline application processes with green standards (reduce red tape).

Transportation Goals: What four goals should transportation systems in Marin County try to accomplish?

- Increase transit usage locally and regionally through bus and train: affordable; efficient; frequent; better connectivity;
- Reduce regional freeway travel times: reduce bottlenecks on freeways and local roads; improve Interstate 580/Highway 101 connectivity; improve connectivity to airports and universities;
- Increase walking and biking for everyday trips: improve safety; complete streets; connectivity; and
- Reduce VMT (Vehicle Miles Traveled): reduce GHG emissions; reduce car trips.

Housing Locations: Additional units should go where? And why there?

Housing Where: Why?

- Downtowns (above shops; on parking lots; infill): walk/bike; transit; local shopping; vitality; quality of life;
- Shopping centers/neighborhood retail: walk/bike; transit; local shopping; vitality; quality of life;
- COM and Dominican Student Housing: Live on campus and quality of life
- Ease of transit: Work/life balance; environmental; quality of life
- Second Units and co-housing, shared housing: stay in homes; small, affordable; near schools

Marin County Transportation System 2020: What additional options should be in place and where?

- SMART to Larkspur and better Ferry connections;
- Feeder system-
 - First/Last Mile to home work and shopping;
 - Sharing vehicles (electric bikes, cards, vans);
- Transit Policies (Pedestrian first, then bike, transit , cars <flip or develop>; subsidies for low income)
- Specific Roadway improvements;
- Schools- more buses walking/biking and less driving!!
- Electric Bikes, cars, transit; and
- Connections between counties-e.g. to Oakland, University of California, Berkeley, UCSF, etc.

Housing and transportation are core needs and services sought by any local resident. For those workers that make relatively low wages, and for residents on fixed incomes or receiving government transfer payments, support above the poverty line is critical to their ability to continue working and living. Much of the social

safety net tied to local residents and how these residents utilize local food and health systems to better their lives.

Social Safety Net

The social safety net in any community is meant to both alleviate poverty and provide additional support for lower-income individuals where applicable and needed. This includes food systems, workforce development infrastructure and assistance, health care, housing choice, and many socioeconomic aspects of a local community. The following questions and answers were determined at our focus group on this issue.

What are goals beyond increasing nutritional food and housing availability, which can help Marin County mitigate poverty?

- Health: address mental health needs; health services for all (including undocumented; wellness opportunities e.g. exercise);
- Education: Increase at all levels pre-natal to college; ESL: general and employment college funding;
- Childcare and Eldercare: quality and affordability;
- Transportation: access to safety net services and social events;
- Connectivity: reduce isolation and shame; and
- Advocacy and engagement: increase minimum wage; engage community (especially wealthy) in needs of nonprofits and poor.

What are goals beyond increasing food and housing specific to helping Marin's seniors (folks 65 and older) and their safety net?

- Encouraging and building collaborative communities (reducing stigma and improving socialization);
- Improve access to healthcare options at all levels;
- Improved work or volunteer opportunities for seniors; and
- Greater Mobility-i.e. transportation options.

What specific tasks can be done to enhance food and housing security in Marin County?

- Food Security:
 - Increase community gardens throughout the county;
 - Increase Gleaners programs and publicize donations by local homeowners who have excess food crops;
 - Barter system (food for farm help);
 - Transportation, shopper services to access food pantries, free meals;
 - Volunteers to deliver fresh food leftover in food markets; and
 - Increase number of food pantries and free food sites.

- Housing:
 - Make it easy to create second units and co-housing, communal spaces;
 - Create dorm space for commuters to stay overnight or weekly;
 - Advocate for more section-8 housing, increase stipends and education for land owners to manage them effectively;
 - Create emergency rent programs;
 - Expand rent to own programs; and
 - Expand affordable housing buy/rent close to transit.

What are goals for local businesses in supporting Marin's social safety net?

- Better hiring practices;
- More job training;
- More availability of community education;
- Better business models for safety net providers;
- Better alternate uses of space; and
- More discount programs for food and shelter.

The social safety net may be one of the major areas of infrastructure expansion with the Affordable Care Act, recent expansions of eligibility of state-level public health benefits, and an aging populace in Marin County. Further, because the labor and housing markets are regional, the county's social safety net serves a populace beyond Marin County's borders. The resources needed to provide on-going support may include a need to expand infrastructure.

9. Plan of Action

The plan of action from this report is in two parts. The first part are the overarching recommendations based on where some support is needed in Marin County and to play to county strengths. Further, the plan of action, the performance measures and the measurable outcomes discussed below are all focused on community resiliency:

- How well can the local economy recover from an economic downturn?
- How well are the lower-income groups in the community supported for education, employment, and health?
- How are new business and their formation locally supported by the residents and local governments?
- How water, energy and resource efficient is the local economy and community such that a natural disaster or other loss of essential resources is planned for and coordinated regionally?

Part One: General Priorities

Based on the goals stated above, the general priorities focus on socioeconomic outcomes for Marin County. This strategy will be implemented such that Marin County:

- Promote economic development and opportunity, specifically for lifting up lower-wage workers;
- Expand transportation access and usage;
- Protect Marin County's natural environment while promoting sustainable tourism and agriculture in Marin County;
- Enhance the social safety net by strategically growing infrastructure and programs to support lower-income residents;
- Promotes an expansion of wireless connectivity throughout the county to assist educators, visitors, workers, residents, and businesses;
- Promote and support workforce development regionally, recognizing that Marin County shares residents as workers throughout the North Bay and the Bay Area counties; and
- Obtain and utilize funds from private and public sources to assist on the above goals.

The second set is specific to the targeted industries:

- Support the growth of life sciences companies in Marin County as part of a regional effort.
- Support more tourism partnerships in broad industry categories, including medical procedures, restaurants, local farmers markets, and conference facilities;
- Support manufacturing space where possible for local artisans, food and beverage manufacturing, farmers, and other businesses that need space;
- Support logistics for people, goods, and ideas; and
- Develop more explicit links between local education and local employers, recognizing a regional element.

10. Alignment with State Economic Development Priorities

The state of California is in the process of refining and defining its economic development strategy. The CA Economy consortium (see <http://www.caeconomy.org/>) acts as the state government's lead group on these efforts. The following goals are defined as the major initiatives of the California economy:

- **Advanced Manufacturing:** Ensure that manufacturing remains a viable, long term component of California's economy that creates middle-class jobs and opportunities for California residents.
- **Capital Investment:** Identify gaps, eliminate barriers, and establish appropriate intermediaries to increase access to capital; and target investments that generate economic as well as social and environmental returns to California communities.
- **Housing:** Adequate supply of housing that aligns with current and future population demand and employment centers, including affordable housing for low-income workers and families as well as for vulnerable populations (e.g. disabled, homeless and seniors); diverse supply of housing with broad array of housing products available to residents from single-family detached homes to high-rise condominiums, to own or to rent; access to public transportation that allows people in all neighborhoods freedom of movement to access to good jobs, healthcare, and healthy food without owning a car.
- **Infrastructure:** Adopt a comprehensive approach to infrastructure planning, development, resource conservation and finance that is focused on economic growth, environmental sustainability, and equal opportunities for all; and ensure that all levels of government have sufficient financing and project delivery authority to facilitate investment in support of state, regional and local economies.
- **Regulation Streamlining:** Strengthen California's high environmental, worker-protection and public-standards safety, while turning regulations into a competitive advantage; develop technology-based systems to track applications at every step in the process; modify selected regulatory processes to improve accountability, transparency, consistency of process, and timeliness; create incentives for companies and industries that have voluntarily adopted best practices and higher environmental standards than required by law; Measure customer satisfaction using an independently developed online system; and maintain a focus on CEQA modernization by focusing on administrative and regulatory over legislative solutions; determine whether pilot tracking system can be implemented.
- **Workforce Development** Prepare people for in-demand and/or high-growth jobs in major industry sectors; prioritize workforce-training resources to support major regional industry sectors; create partnerships between local workforce-investment boards (WIBs), community colleges, economic-development organizations, businesses, and labor.
- **Working Landscapes** Design and implement policy and programs that balance all potential values of working landscapes - reflecting true costs and benefits provided to both urban and rural communities,

today and for future generations; and ensure that recommended policy and actions build upon the work of earlier initiatives and that all stakeholders are engaged.

The Association of Bay Area Governments (ABAG) is also refining its regional economic development strategy. ABAG's strategy is called "Plan Bay Area" (see www.planbayarea.org for more). This plan was first released in 2013 and is going through revisions on its estimates and on its planning. Plan Bay Area has four major areas of concern for the regional economy in which Marin County exists:

Housing and Jobs

Plan Bay Area must project the region's growth in terms of jobs and population and identify geographic areas sufficient to house that growth. Once the Bay Area's housing need is projected, a housing plan is developed to allocate voluntary housing unit targets to each local jurisdiction. The housing plan within Plan Bay Area must be consistent with a development pattern that promotes reductions in greenhouse gases. State law requires an emphasis on compact, mixed-use commercial and residential development with access to public transit. Plans for housing must also include sufficient affordable units so that people don't have to commute from outside the Bay Area to jobs within the region.

Transportation

Transportation policies and investments identified in Plan Bay Area aim to maintain the region's extensive, existing transportation network as well as support the housing and development pattern that reduces emissions from cars and light trucks. Plan Bay Area uses a performance-based planning to help ensure that we achieve high returns on transportation policies and investments. Plan Bay Area looks at a range of strategies to make it easy, safe and affordable for Bay Area residents to get from point A to point B.

Environmental Impact Report

The Environmental Impact Report (EIR) is a legally required document that assesses the environmental impacts of Plan Bay Area's proposed development patterns and transportation investments. By examining a series of related actions that are geographically and conceptually related, Plan Bay Area's program-level EIR can adequately analyze cumulative regional impacts, explore reasonable alternatives, and consider wide-ranging mitigation measures. The EIR's program-level analysis also helps local jurisdictions and other agencies with their own planning efforts.

Equity Analysis

The Equity Analysis represents a concerted effort to understand how Plan Bay Area will impact low-income and minority populations. In accordance with Plan Bay Area's performance-based approach, the Equity Analysis uses quantitative measures to gauge how the plan will affect specific issues identified in consultation with local citizens. The Equity Analysis satisfies federal requirements with respect to the metropolitan planning process; it also demonstrates the extent to which Plan Bay Area aspires to advance regional equity.

Notice how both the state and regional plans provides similar contexts and concerns as the CEDS plan of action and details throughout this report. The Marin County CEDS is aligned well with regional and state planning.

11. Performance Measures

Measuring the progress of an economy means tracking a large number of potential economic and social variables. There is not one measure that summarizes performance of a county economy without asking more questions than it answers. However, the following list is perhaps a set of metrics that summarize ways that Marin County can track its success in implementing this CEDS strategy.

- Monitor the commute flows in and out of Marin County, where these workers go to and come from, and the wage and income differentials for similar industries and overall;
- Comparison of jobs growth for both residents and local employers to other counties in the North Bay and Bay Area;
- Comparison of wage and household income variability, again comparing residents to those that work in Marin County and live elsewhere, and also compare to state and national level figures;
- Track the number of visitors that come into Marin County, where they stay, what the final destinations may be (in terms of county of final destination), how much visitors spend, and on what goods and services they spend;
- Tracking county Transient Occupancy Tax (TOT) collections and how those figures track with tourism spending in Marin County otherwise;
- Tracking of county sales tax collections as a way to track retail sales;
- Monitor the use of the social safety net, taking into account changing demographics, changing income levels, and changes in health care eligibility and payment systems; and
- Tracking of county exports versus imports of goods and services, including measures of food security, health care access, and educational resources.

Trends in these key economic indicators and any significant changes in the economy will be monitored on a consistent and timely basis. Effectiveness in meeting goals will be evaluated and adjustments will be made to the CEDS document as required to meet the performance goals of the document and/or the economic development needs of the region. The appendix that follows provides more data on Marin County and comparisons across all the sections of this document.

Measurable Outcomes of This Plan

The following are potential, measurable targets for Marin County economic development efforts.

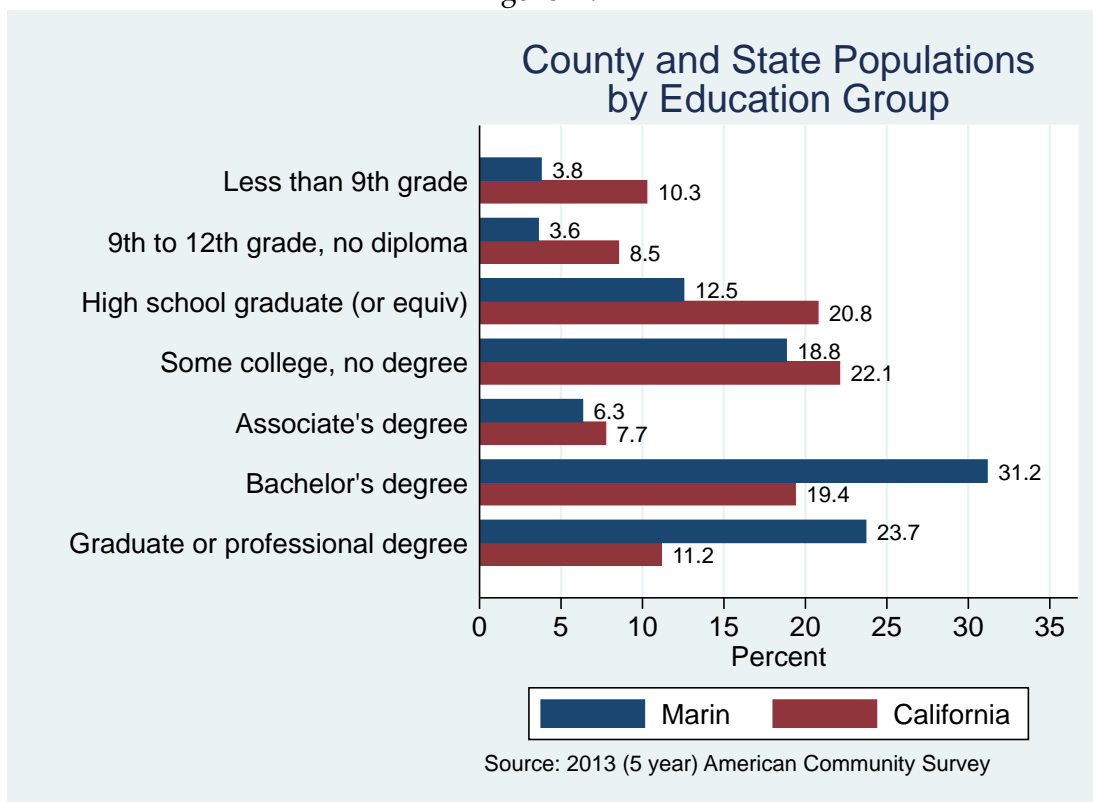
- Grow jobs in the sum of the targeted industries by 5 percent per year, and outpace average employment growth;
- Expand broadband and wireless access to reach 10 percent more households per year, with the goal of 99 percent of all county households and businesses by 2020;
- Reduce the number of households in poverty, specifically those under 100 percent of the poverty line, by 5 percent per year through 2020;
- Increase tourism revenue for Marin County overall by 10 percent per year, with a focus on overnight stays rising at 15 percent per year to drive the broader multiplier effects of more local tourism;
- Develop a strategic plan for community resiliency in West Marin around an expansion of tourism, specifically overnight stays, with infrastructure expansion and environmental balance with the residents and local agricultural businesses;
- Establish an energy and water management plan for the county as linked to regional efforts by 2022;
- Reduce aggregate commute times by 5 percent per year by marketing and utilizing expanding and current transit infrastructure; and
- Augment the social safety net in three ways through 2020:
 1. Increase availability of low-cost child care by 5 percent per year in terms of capacity;
 2. Increase senior adult job training programs by 2 percent per year; and
 3. Increase opportunities for low-income housing by augmenting total units available by 1 percent per year.

APPENDIX

This appendix provides additional information referenced or connected to part of this CEDS report. The sections are set up on the same order as the report itself for easy reference by the reader. Data presented in the following tables were collected between Sept 2014 and April 2015. All dollar values are adjusted to 2013 levels.

A.1. General Demographic Characteristics

Figure A.1-1



A.2. Labor Force

Table A.2 - 1. Civilian Labor Force Participation by Age and Sex in Marin

Age Group	Civilian Population 16 Years and Over	Civilian Labor Force					
		Total	Civilian Labor Force Participation Rate	Male	Male Civilian Labor Force Participation Rate	Female	Female Civilian Labor Force Participation Rate
16-19	10,650	3,957	37.2	1,764	31.4	2,193	43.6
20-24	10,109	6,555	64.8	3,559	63.0	2,996	67.2
25-29	11,628	9,149	78.7	4,941	78.4	4,208	79.0
30-34	13,010	11,032	84.8	5,836	84.4	5,196	85.3
35-39	16,201	13,335	82.3	6,850	87.8	6,485	77.2
40-44	19,948	16,291	81.7	8,796	86.5	7,495	76.6
45-49	21,246	17,541	82.6	9,281	86.1	8,260	78.9
50-54	20,615	17,183	83.4	8,237	84.3	8,946	82.5
55-59	21,384	16,646	77.8	8,620	84.3	8,026	71.9
60-64	18,361	12,601	68.6	6,019	70.5	6,582	67.0
65-69	14,168	6,384	45.1	3,233	49.2	3,151	41.5
70-74	9,025	2,486	27.5	1,580	35.1	906	20.0
75+	19,112	1,267	6.6	817	10.8	450	3.9
Total	205,457	134,427	65.4	69,533	69.3	64,894	61.8

Source: 2013 (5 year) American Community Survey

Table A.2 - 2. Employment Status by Age and Sex Among Employed Residents of Marin

Age Group	Male Civilian Labor Force			Female Civilian Labor Force		
	Employed	Unemployed	Unemployment Rate	Employed	Unemployed	Unemployment Rate
16-19	1,170	594	33.7	1,730	463	21.1
20-24	3,096	463	13.0	2,483	513	17.1
25-29	4,450	491	9.9	3,886	322	7.7
30-34	5,628	208	3.6	4,697	499	9.6
35-39	6,395	455	6.6	5,677	808	12.5
40-44	8,368	428	4.9	7,145	350	4.7
45-49	8,638	643	6.9	7,854	406	4.9
50-54	7,746	491	6.0	8,317	629	7.0
55-59	8,107	513	6.0	7,649	377	4.7
60-64	5,707	312	5.2	6,205	377	5.7
65-69	3,024	209	6.5	2,984	167	5.3
70-74	1,551	29	1.8	890	16	1.8
75+	791	26	3.2	389	61	13.6
Total	64,671	4,862	7.0	59,906	4,988	7.7

Source: 2013 (5 year) American Community Survey

-----Table A.2 - 2. Continued-----

Age Group	Total Civilian Labor Force		
	Employed	Unemployed	Unemployment Rate
16-19	2,900	1,057	26.7
20-24	5,579	976	14.9
25-29	8,336	813	8.9
30-34	10,325	707	6.4
35-39	12,072	1,263	9.5
40-44	15,513	778	4.8
45-49	16,492	1,049	6.0
50-54	16,063	1,120	6.5
55-59	15,756	890	5.3
60-64	11,912	689	5.5
65-69	6,008	376	5.9
70-74	2,441	45	1.8
75+	1,180	87	6.9
Total	124,577	9,850	7.3

Source: 2013 (5 year) American Community Survey

Table A.2 - 3. Civilian Labor Force Participation and Employment Status by Race/Ethnicity in Marin

Race/Ethnicity	Civilian Labor Force			
	Total	Participation Rate	Employed	Unemployed Rate
White, Not Hispanic	99,786	64.5	93,119	6,667
Black, Not Hispanic	2,326	42.6	1,982	344
Asian, Not Hispanic	7,866	66.9	7,443	423
Hispanic	20,958	74.7	19,081	1,877
Total	134,427	65.4	124,577	9,850

Source: 2013 (5 year) American Community Survey

Table A.2 - 4. Civilian Labor Force Participation by Race/Ethnicity for Persons 16 to 64 Years in Marin

Race/Ethnicity	Civilian Population 16 to 64 Years		
	Total	Civilian Labor Force	Civilian Labor Force Participation Rate
White, Not Hispanic	116,610	90,580	77.7
Black, Not Hispanic	4,944	2,211	44.7
Asian, Not Hispanic	10,064	7,502	74.5
Hispanic	26,444	20,613	77.9
Total	163,152	124,290	76.2

Source: 2013 (5 year) American Community Survey

Table A.2 - 5. Major Industry Group by Sex Among Employed Residents of Marin

Major Industry Group	Male		Female		Total	
	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing, and Hunting	576	0.9	209	0.3	785	0.6
Mining	29	0.0	60	0.1	89	0.1
Construction	6,742	10.4	855	1.4	7,597	6.1
Manufacturing	4,059	6.3	1,973	3.3	6,032	4.8
Wholesale Trade	1,991	3.1	1,166	1.9	3,157	2.5
Retail Trade	6,947	10.7	5,613	9.4	12,560	10.1
Transportation and Utilities	1,958	3.0	877	1.5	2,835	2.3
Information	2,689	4.2	1,815	3.0	4,504	3.6
Financial Activities	7,024	10.9	5,621	9.4	12,645	10.2
Professional and Business Services	13,581	21.0	10,893	18.2	24,474	19.6
Educational and Health Services	7,826	12.1	18,401	30.7	26,227	21.1
Leisure and Hospitality	6,615	10.2	5,207	8.7	11,822	9.5
Other Services	2,706	4.2	5,078	8.5	7,784	6.2
Public Administration	1,928	3.0	2,138	3.6	4,066	3.3
Total	64,671	100.0	59,906	100.0	124,577	100.0

Source: 2013 (5 year) American Community Survey

Table A.2 - 6. Median Earnings by Major Industry Group Among Employed Residents of Marin

Major Industry Group	All Workers	Full-Time, Year-Round Workers
Agriculture, Forestry, Fishing, and Hunting	24,875	25,413
Mining	35,251	105,405
Construction	41,472	62,207
Manufacturing	79,982	86,882
Wholesale Trade	76,722	87,090
Retail Trade	25,920	45,619
Transportation and Utilities	52,703	63,243
Information	72,575	90,544
Financial Activities	81,452	103,297
Professional and Business Services	69,537	98,828
Educational and Health Services	49,749	70,592
Leisure and Hospitality	20,736	39,799
Other Services	23,846	42,286
Public Administration	72,730	84,324
Total	48,487	74,624

Source: 2013 (5 year) American Community Survey

Table A.2 - 7. Major Occupation Group by Sex in Among Employed Residents of Marin

Major Occupation Group	Male		Female		Total	
	Number	Percent	Number	Percent	Number	Percent
Management, Business, and Financial	13,145	20.3	9,922	16.6	23,067	18.5
Computer, Engineering, and Science	4,112	6.4	2,251	3.8	6,363	5.1
Education	1,928	3.0	4,486	7.5	6,414	5.1
Legal, Community Service, Arts, and Media	4,797	7.4	4,541	7.6	9,338	7.5
Healthcare Practitioners and Technicians	2,192	3.4	4,298	7.2	6,490	5.2
Healthcare Support	311	0.5	868	1.4	1,179	0.9
Protective Service	738	1.1	171	0.3	909	0.7
Food Preparation and Service	2,072	3.2	1,825	3.0	3,897	3.1
Building and Grounds Cleaning and Maintenance	2,404	3.7	1,803	3.0	4,207	3.4
Personal Care and Service	823	1.3	3,264	5.4	4,087	3.3
Sales and Related	6,580	10.2	5,430	9.1	12,010	9.6
Office and Administrative Support	2,570	4.0	7,226	12.1	9,796	7.9
Farming, Fishing, and Forestry	322	0.5	153	0.3	475	0.4
Construction and Extraction	4,413	6.8	282	0.5	4,695	3.8
Installation, Maintenance, and Repair	1,500	2.3	110	0.2	1,610	1.3
Production	1,658	2.6	562	0.9	2,220	1.8
Transportation and Material Moving	1,856	2.9	252	0.4	2,108	1.7
Unknown	13,250	20.5	12,462	20.8	25,712	20.6
Total	64,671	100.0	59,906	100.0	124,577	100.0

Source: 2013 (5 year) American Community Survey

Table 2 - 8. Wages by Occupation in Marin County

Occupation	Full Time/Full Year Employment	Annual Pay		Percent < or > California Pay
		Marin County	California	
Management, Business, and Financial	\$105,405	\$99,498	\$65,161	52.7
Computer, Engineering, and Science	99,498	84,324	78,796	7.0
Education	67,391	47,432	40,538	17.0
Legal, Community Service, Arts, and Media	99,498	72,575	48,871	48.5
Healthcare Practitioners and Technicians	105,752	84,324	65,161	29.4
Healthcare Support	36,814	20,736	24,770	-16.3
Protective Service	78,194	69,506	53,729	29.4
Food Preparation and Service	23,328	16,865	15,204	10.9
Building and Grounds Cleaning and Maintenance	28,670	18,905	18,462	2.4
Personal Care and Service	35,222	22,809	15,178	50.3
Sales and Related	78,194	42,162	27,860	51.3
Office and Administrative Support	50,595	35,838	31,104	15.2
Farming, Fishing, and Forestry	21,358	17,910	15,920	12.5
Construction and Extraction	41,472	31,104	31,839	-2.3
Installation, Maintenance, and Repair	43,441	38,207	39,799	-4.0
Production	46,656	36,892	26,878	37.3
Transportation and Material Moving	48,456	29,323	26,065	12.5
Unknown	67,657	43,225	31,010	39.4
All Workers	\$74,624	\$48,487	\$33,730	43.8

Source: U.S. Census Bureau, American Community Survey.

Table A.2 - 9. Marin Families by Number of Workers and Median Family Income

Number of Workers	Families	Percent	Median Family Income
Zero	10,131	14.5	70,809
One	23,443	33.5	102,284
Two	32,602	46.6	132,542
Three or More	3,835	5.5	122,159
Total	70,011	100.0	114,298

Source: 2013 (5 year) American Community Survey

Table A.2 - 10. Means of Transportation to Work by Marin's Workers

Means of Transportation	Number	Percent
Car, Truck, or Van	91,955	75.7
Drove Alone	80,857	66.6
Carpooled	11,098	9.1
2-Person Carpool	8,398	6.9
3-or-more Person Carpool	2,700	2.2
Public Transportation (Excluding Taxicab)	10,270	8.5
Bicycle	1,663	1.4
Walked	4,527	3.7
Taxicab, Motorcycle, or Other Means	1,193	1.0
Worked at Home	11,823	9.7
Total	121,431	100.0

Source: 2013 (5 year) American Community Survey

Table A.2 - 11. Travel Time to Work by Employed Residents of Marin

Travel Time (In Minutes)	Number	Percent
Less than 15	29,057	26.5
15 to 29	31,840	29.0
30 to 44	23,148	21.1
45-59	13,735	12.5
60-89	9,502	8.7
90+	2,326	2.1
Total	109,608	100.0
Mean Travel Time		28.0

Source: 2013 (5 year) American Community Survey

A.3. Income

Table A.3 - 1. Marin Family Income by Race/Ethnicity of Householder and Household Income

Income	Families by Race/Ethnicity of Householder					
	White, Not Hispanic	Percent	Black, Not Hispanic	Percent	Asian, Not Hispanic	Percent
Less than \$10,000	584	1.2	110	11.7	198	5.8
\$10,000 - \$19,999	1,075	2.1	133	14.1	134	4.0
\$20,000 - \$29,999	1,480	2.9	152	16.2	94	2.8
\$30,000 - \$39,999	1,870	3.7	170	18.1	190	5.6
\$40,000 - \$49,999	2,326	4.6	77	8.2	236	7.0
\$50,000 - \$74,999	5,459	10.8	21	2.2	324	9.6
\$75,000 - \$99,999	6,072	12.0	61	6.5	467	13.8
\$100,000 - \$149,999	10,475	20.8	134	14.3	699	20.6
\$150,000 - \$199,999	7,016	13.9	82	8.7	385	11.4
\$200,000 and over	14,087	27.9			659	19.5
Total	50,444	100.0	940	100.0	3,386	100.0
Median Income	127,525		35,838		104,878	

Source: 2013 (5 year) American Community Survey

-----Table A.3 - 1. Continued-----

Income	Families by Race/Ethnicity of Householder				Households	
	Hispanic	Percent	Total	Percent	Number	Percent
Less than \$10,000	310	3.9	1,369	2.1	1,369	1.3
\$10,000 - \$19,999	960	12.0	2,324	3.6	2,324	2.3
\$20,000 - \$29,999	1,175	14.6	2,918	4.6	2,918	2.8
\$30,000 - \$39,999	1,274	15.9	3,544	5.5	3,544	3.4
\$40,000 - \$49,999	697	8.7	3,344	5.2	3,344	3.2
\$50,000 - \$74,999	1,301	16.2	7,350	11.5	7,350	7.1
\$75,000 - \$99,999	924	11.5	7,676	12.0	7,676	7.4
\$100,000 - \$149,999	667	8.3	12,199	19.1	12,199	11.8
\$150,000 - \$199,999	236	2.9	7,790	12.2	7,790	7.6
\$200,000 and over	482	6.0	15,403	24.1	15,403	14.9
Total	8,026	100.0	63,917	100.0	103,125	100.0
Median Income	44,582		112,762		85,796	

Source: 2013 (5 year) American Community Survey

Table A.3 - 2. Marin Families by Size of Family and Median Family Income

Family Size	Families		Median Income
	Number	Percent	
2	31,786	49.7	104,258
3	14,183	22.2	115,602
4	12,640	19.8	135,753
5	3,679	5.8	106,789
6	1,102	1.7	94,555
7+	527	0.8	69,912
Total	63,917	100.0	112,762

Source: 2013 (5 year) American Community Survey

Table A.3 - 3. Marin Households by Size of Household and Median Household Income

Household Size	Households		Median Income
	Number	Percent	
1	31,663	30.7	44,774
2	36,918	35.8	103,679
3	14,818	14.4	114,298
4	13,779	13.4	134,844
5	4,017	3.9	105,405
6	1,254	1.2	94,555
7+	676	0.7	84,759
Total	103,125	100.0	85,796

Source: 2013 (5 year) American Community Survey

Table A.3 - 4. Marin Households by Age of Householder and Median Household Income

Age of Householder	Households		Median Income
	Number	Percent	
Under 35	11,290	10.9	53,729
35-44	18,123	17.6	105,405
45-54	22,609	21.9	105,405
55-64	23,421	22.7	102,746
65+	27,682	26.8	62,611
Total	103,125	100.0	85,796

Source: 2013 (5 year) American Community Survey

Table A.3 - 5. Marin Households by Selected Types of Income

Type of Income	Households		Median Income
	Number	Percent	
Wage or Salary	72,780	70.6	82,943
Self Employment	24,786	24.0	31,010
Interest, Dividends, or Net Rental Income	43,880	42.6	9,950
Social Security	29,950	29.0	16,318
Supplemental Security Income (SSI)	2,405	2.3	9,491
Public Assistance	1,959	1.9	3,582
Retirement, Survivor, or Disability Income	17,713	17.2	22,552

Source: 2013 (5 year) American Community Survey

Table A.3 - 6. Personal Income by Sex in Marin

Personal Income	Male		Female		Total	
	Number	Percent	Number	Percent	Number	Percent
No Income	10,335	10.2	14,066	13.2	24,401	11.7
Loss	222	0.2	198	0.2	420	0.2
\$1 - \$9,999	11,119	10.9	16,861	15.8	27,980	13.4
\$10,000 - \$19,999	10,450	10.3	16,096	15.1	26,546	12.7
\$20,000 - \$29,999	9,310	9.1	10,585	9.9	19,895	9.6
\$30,000 - \$39,999	7,997	7.9	7,646	7.2	15,643	7.5
\$40,000 - \$49,999	6,516	6.4	6,917	6.5	13,433	6.5
\$50,000 - \$74,999	12,523	12.3	13,087	12.3	25,610	12.3
\$75,000 - \$99,999	7,519	7.4	8,040	7.6	15,559	7.5
\$100,000 - \$149,999	10,445	10.3	7,058	6.6	17,503	8.4
\$150,000 - \$199,999	4,642	4.6	2,043	1.9	6,685	3.2
\$200,000 and over	10,726	10.5	3,823	3.6	14,549	7.0
Total	101,804	100.0	106,420	100.0	208,224	100.0
Median Income	56,000		35,000		44,000	

Source: 2013 (5 year) American Community Survey

Table A.3 - 7. Selected Types of Income by Sex for the Population 65 Years and Over in Marin

Types of Income	Males 65+			Females 65+		
	Number	Percent	Median Income	Number	Percent	Median Income
All Income Types	18,223	100.0	52,703	22,797	100.0	22,859
Wage or Salary	4,506	24.7	55,687	4,035	17.7	25,920
Self Employment	2,514	13.8	27,151	1,752	7.7	13,087
Interest, Dividends, or Net Rental Income	11,377	62.4	15,975	10,674	46.8	9,039
Social Security	15,881	87.1	16,624	19,883	87.2	11,083
Supplemental Security Income (SSI)	374	2.1	8,175	679	3.0	5,059
Retirement, Survivor, or Disability Income	7,533	41.3	27,157	7,648	33.5	13,597

Source: 2013 (5 year) American Community Survey

----- Table A.3 - 7. Continued-----

Type of Income	Total 65+		
	Number	Percent	Median Income
All Income Types	41,020	100.0	33,884
Wage or Salary	8,541	20.8	35,355
Self Employment	4,266	10.4	20,673
Interest, Dividends, or Net Rental Income	22,051	53.8	11,911
Social Security	35,764	87.2	13,233
Supplemental Security Income (SSI)	1,053	2.6	7,705
Retirement, Survivor, or Disability Income	15,181	37.0	18,794

Source: 2013 (5 year) American Community Survey

A.4. Poverty

Table 4 - 1. Poverty Rates Among Households

Year	Marin County	California	United States
1989	3.5	8.9	11.8
1999	4.6	10.4	11.0
2007	5.3	9.8	11.3
2008	5.8	10.5	11.6
2009	4.5	11.0	12.3
2010	6.1	11.3	12.8
2011	7.2	13.0	13.4
2012	7.0	13.3	13.5
2013	5.6	13.5	13.6

Source: U.S. Census Bureau, American Community Survey.

Note: The remaining tables in Appendix Section A.3 indicate poverty rates among persons.

Table A.4 - 2. Race/Ethnicity by Poverty Status in Marin

Race/Ethnicity	Total	Poverty Level				
		Below 100%	Poverty Rate	Below 150%	Below 200%	Below 300%
White, Not Hispanic	181,816	9,829	5.4	15,786	22,258	37,618
Black, Not Hispanic	4,404	1,021	23.2	1,640	1,959	2,725
Asian, Not Hispanic	13,417	1,143	8.5	1,777	2,786	3,557
Hispanic	36,652	5,909	16.1	13,274	17,957	25,169
Total	244,090	18,846	7.7	33,964	46,578	71,403

Source: 2013 (5 year) American Community Survey

Table A.4 - 3. Age by Poverty Status in Marin

Age Group	Total	Poverty Level				
		Below 100%	Poverty Rate	Below B150%	Below 200%	Below 300%
Under 18	51,277	4,551	8.9	8,602	11,173	16,615
18-34	36,747	4,481	12.2	8,388	11,408	16,742
35-49	55,235	3,893	7.0	6,547	9,475	14,286
50-64	59,250	3,435	5.8	5,629	8,016	12,399
65+	41,581	2,486	6.0	4,798	6,506	11,361
Total	244,090	18,846	7.7	33,964	46,578	71,403

Source: 2013 (5 year) American Community Survey

Table A.4 - 4. Families by Family Type and Poverty Status in Marin

Family Type	Families		
	Total	Below Poverty	Poverty Rate
Married-Couple Families	51,518	1,120	2.2
With Related Children	22,889	759	3.3
Without Related Children	28,629	361	1.3
Male Householder, No Wife Present	3,437	406	11.8
With Related Children	2,133	396	18.6
Without Related Children	1,304	10	0.8
Female Householder, No Husband Present	8,962	1,427	15.9
With Related Children	5,539	1,355	24.5
Without Related Children	3,423	72	2.1
Total Families	63,917	2,953	4.6
With Related Children	30,561	2,510	8.2
Without Related Children	33,356	443	1.3

Source: 2013 (5 year) American Community Survey

Table A.4 - 5. Presence of Parent in Family by Poverty Status for Related Children Under 18 Years Old in Marin

Presence of Parent	Total	Below Poverty	Poverty Rate
Both Parents	39,595	1,841	4.6
Father Only	3,301	700	21.2
Mother Only	8,758	2,065	23.6
Neither	806	213	26.4
Unrelated Child	50	50	100.0
Total	52,510	4,869	9.3

Source: 2013 (5 year) American Community Survey

A.5. Educational Attainment

Table A.5 - 1. Educational Attainment by Sex in Marin

Educational Attainment	Male		Female		Total	
	Number	Percent	Number	Percent	Number	Percent
Not a High School Graduate	7,941	8.9	5,994	6.3	13,935	7.5
High School Graduate	12,668	14.2	10,707	11.2	23,375	12.6
Some College, No Degree	16,308	18.3	18,101	18.9	34,409	18.6
Associate's Degree	4,638	5.2	6,781	7.1	11,419	6.2
Bachelor's Degree	26,379	29.5	32,166	33.7	58,545	31.7
Master's Degree	11,939	13.4	15,026	15.7	26,965	14.6
Professional or Doctorate	9,439	10.6	6,788	7.1	16,227	8.8
Total	89,312	100.0	95,563	100.0	184,875	100.0

Source: 2013 (5 year) American Community Survey

Table A.5 - 2. Educational Attainment by Race in Marin

Educational Attainment	White, Not Hispanic		Black, Not Hispanic		Asian, Not Hispanic	
	Number	Percent	Number	Percent	Number	Percent
Not a High School Graduate	3,525	2.5	1,118	23.8	762	7.2
High School Graduate	15,207	10.6	1,253	26.7	1,010	9.6
Some College or Associate's Degree	36,026	25.2	1,380	29.4	2,139	20.3
Bachelor's Degree	50,040	35.0	643	13.7	3,926	37.3
Master's Degree or Higher	38,058	26.6	300	6.4	2,679	25.5
Total	142,856	100.0	4,694	100.0	10,516	100.0
High School Graduate or Higher	139,331	97.5	3,576	76.2	9,754	92.8
Bachelor's Degree or Higher	88,098	61.7	943	20.1	6,605	62.8
Median Level of Educational Attainment		14.0		12.0		14.0

Source: 2013 (5 year) American Community Survey

-----Table A.5 - 2. Continued-----

Educational Attainment	Hispanic		Total	
	Number	Percent	Number	Percent
Not a High School Graduate	8,144	35.8	13,935	7.5
High School Graduate	5,063	22.3	23,375	12.6
Some College or Associate's Degree	5,060	22.3	45,828	24.8
Bachelor's Degree	2,912	12.8	58,545	31.7
Master's Degree or Higher	1,539	6.8	43,192	23.4
Total	22,718	100.0	184,875	100.0
High School Graduate or Higher	14,574	64.2	170,940	92.5
Bachelor's Degree or Higher	4,451	19.6	101,737	55.0
Median Level of Educational Attainment		12.0		14.0

Source: 2013 (5 year) American Community Survey

Table A.5 - 3. Educational Attainment by Nativity in Marin

Educational Attainment	Native		Naturalized	Foreign Born			Total
	Number	Percent		Percent	Noncitizen	Percent	
Not a High School Graduate	4,663	3.3	2,438	11.9	6,834	31.4	13,935
High School Graduate	16,137	11.3	3,108	15.2	4,130	19.0	23,375
Some College or Associate's Degree	36,489	25.6	5,090	24.8	4,249	19.5	45,828
Bachelor's Degree	49,695	34.8	5,152	25.1	3,698	17.0	58,545
Master's Degree or Higher	35,652	25.0	4,704	23.0	2,836	13.0	43,192
Total	142,636	100.0	20,492	100.0	21,747	100.0	184,875
High School Graduate or Higher	137,973	96.7	18,054	88.1	14,913	68.6	170,940
Bachelor's Degree or Higher	85,347	59.8	9,856	48.1	6,534	30.0	101,737
Median Level of Educational Attainment		14.0		13.5		12.0	

Source: 2013 (5 year) American Community Survey

Table A.5 - 4. High School Diploma or Higher by Age and Sex in Marin

Age Group	Male		Female		Total	
	Number	Percent of Age	Number	Percent of Age	Number	Percent of Age
25-34	10,635	79.9	9,973	87.4	20,608	83.3
35-49	26,064	90.4	26,718	93.3	52,782	91.8
50-64	27,059	94.8	30,696	96.5	57,755	95.7
65+	17,613	94.6	22,182	93.7	39,795	94.1
Total	81,371	91.1	89,569	93.7	170,940	92.5

Source: 2013 (5 year) American Community Survey

Table A.5 - 5. Bachelor's Degree or Higher by Age and Sex in Marin

Age Group	Male		Female		Total	
	Number	Percent of Age	Number	Percent of Age	Number	Percent of Age
25-34	4,370	32.8	5,406	47.4	9,776	39.5
35-49	15,670	54.3	18,504	64.6	34,174	59.5
50-64	16,692	58.5	19,363	60.8	36,055	59.7
65+	11,025	59.2	10,707	45.2	21,732	51.4
Total	47,757	53.5	53,980	56.5	101,737	55.0

Source: 2013 (5 year) American Community Survey

Table A.5 - 6. Earnings by Educational Attainment in Marin

Earnings	Not a High School Graduate		High School Graduate		Some College or Associate's Degree	
	Number	Percent	Number	Percent	Number	Percent
Less than \$10,000	839	18.1	655	8.6	749	4.2
\$10,000 - \$24,999	2,379	51.2	2,030	26.7	3,198	17.7
\$25,000 - \$39,999	944	20.3	1,682	22.1	3,493	19.4
\$40,000 - \$59,999	420	9.0	1,709	22.5	3,635	20.1
\$60,000 - \$79,999			602	7.9	2,476	13.7
\$80,000 - \$99,999	16	0.3	160	2.1	1,723	9.5
\$100,000 and over	49	1.1	774	10.2	2,768	15.3
Total	4,647	100.0	7,612	100.0	18,042	100.0
Median Earnings	19,733		36,615		47,854	

Source: 2013 (5 year) American Community Survey

-----Table A.5 - 6. Continued-----

Earnings	Bachelor's Degree		Master's Degree or Higher		Total	
	Number	Percent	Number	Percent	Number	Percent
Less than \$10,000	533	1.9	343	1.8	3,119	4.0
\$10,000 - \$24,999	2,100	7.7	740	3.8	10,447	13.5
\$25,000 - \$39,999	2,691	9.8	1,289	6.7	10,099	13.1
\$40,000 - \$59,999	4,823	17.6	2,216	11.4	12,803	16.6
\$60,000 - \$79,999	3,861	14.1	2,493	12.9	9,432	12.2
\$80,000 - \$99,999	3,343	12.2	2,490	12.9	7,732	10.0
\$100,000 and over	10,088	36.8	9,804	50.6	23,483	30.5
Total	27,439	100.0	19,375	100.0	77,115	100.0
Median Earnings	79,054		101,189		63,898	

Source: 2013 (5 year) American Community Survey

Table A.5 - 7. Median Earnings by Educational Attainment and Race/Ethnicity in Marin

Educational Attainment	White, Not Hispanic	Black, Not Hispanic	Asian, Not Hispanic	Hispanic	Total
Not a High School Graduate	39,799	4,147	20,736	19,733	19,733
High School Graduate	41,472	42,162	37,946	24,432	36,288
Some College or Associate's Degree	52,876	38,804	43,182	31,622	47,759
Bachelor's Degree	84,324	48,871	50,068	51,739	78,933
Master's Degree or Higher	103,365	82,943	100,135	84,574	100,879
Total	75,892	41,472	56,381	27,151	63,243

Source: 2013 (5 year) American Community Survey

Table A.5 - 8. Median Earnings by Educational Attainment and Sex in Marin

Educational Attainment	Male	Female	Total
Less than High School	22,809	17,910	22,809
Some High School	32,581	20,736	25,297
High School Graduate	45,105	28,776	41,108
Some College, No Degree	57,973	52,622	54,950
Associate's Degree	62,959	62,019	62,207
Bachelor's Degree	103,679	72,575	89,549
Master's Degree	124,415	84,571	101,605
Professional Degree	164,172	105,752	140,381
Doctoral Degree	155,518	102,086	122,159
Total	84,574	67,657	75,892

Source: 2013 (5 year) American Community Survey

A.6. Tourism

Table 6 - 9: California Transient Occupancy Tax by County, Fiscal Year (\$Thousands)

County	Rate	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Alameda	11.0	26,689	25,840	28,045	30,964	24,531	36,425	31,801	29,386	32,177	40,756	41,139
Contra Costa	9.1	9,633	9,372	9,996	10,896	11,918	12,717	10,526	8,904	9,653	11,011	12,599
Marin	10.4	5,953	5,885	6,202	6,855	8,888	8,296	7,180	6,197	7,093	8,126	9,114
Napa	12.2	14,977	15,653	18,032	20,465	21,940	26,469	24,675	23,944	27,602	31,707	35,752
San Francisco	14.0	130,037	145,206	157,151	179,076	199,768	224,814	219,777	192,082	215,512	242,840	241,961
San Mateo	11.0	24,873	26,412	29,401	34,217	37,707	42,408	37,681	36,938	46,467	53,152	64,029
Santa Clara	10.1	45,984	44,368	49,234	57,172	65,141	70,994	59,112	54,704	62,065	75,034	83,790
Solano	9.6	3,941	4,110	4,065	4,217	4,729	4,802	4,003	3,773	4,093	4,361	4,758
Sonoma	9.8	13,459	13,986	15,326	17,038	19,893	20,813	19,020	18,133	19,999	22,368	25,128
California (\$Millions)	11.4	1,037	1,104	1,225	1,358	1,468	1,567	1,417	1,320	1,458	1,612	1,725

Source: Dean Runyan Associates, 2013

Table 6 - 10: County Travel Spending, 1992-2012 (\$Millions)

County	1992 through 2010											*Annual Change		
	1992	1994	1996	1998	2000	2002	2004	2006	2008	2010	2011	2012	11-12	92-12
Alameda	1,749	1,792	2,008	2,235	2,854	2,456	2,715	3,205	3,250	2,939	3,180	3,359	6%	3.3%
Contra Costa	641	675	755	873	1,039	943	1,072	1,250	1,375	1,215	1,337	1,366	2%	3.9%
Marin	299	348	394	455	547	523	624	688	761	641	684	701	2%	4.4%
Napa	358	408	488	570	631	661	733	886	1,026	1,040	990	1,052	6%	5.5%
San Francisco	4,441	4,702	5,378	6,154	7,139	6,122	6,857	7,952	9,192	10,677	11,287	12,008	6%	5.1%
San Mateo	1,353	1,498	1,821	2,135	2,385	1,972	2,138	2,471	2,671	2,621	2,857	2,943	3%	4.0%
Santa Clara	2,317	2,473	2,953	3,526	4,157	3,372	3,528	4,209	4,372	3,952	4,401	4,527	3%	3.4%
Solano	320	335	362	403	495	455	507	554	598	548	585	598	2%	3.2%
Sonoma	661	696	778	882	997	983	1,076	1,240	1,343	1,357	1,472	1,552	5%	4.4%
California	50,462	52,408	58,676	66,277	76,337	72,801	81,359	92,388	98,169	95,104	101,840	106,226	4%	3.8%

Source: Dean Runyan Associates, 2013

*Annual Change refers to the average annual change.

A.7. Geographic Mobility

**Table A.7 - 1. Geographic Mobility in the Past Year by Selected Characteristics
Among Marin Residents**

Characteristic	Total	Nonmover	Mover	Percent Moved
Population 1 year and Over	248,860	212,439	36,421	14.6
Age Group				
1-17	48,998	41,740	7,258	14.8
18-24	14,987	10,944	4,043	27.0
25-34	24,731	16,451	8,280	33.5
35-49	57,479	47,701	9,778	17.0
50-64	60,360	55,424	4,936	8.2
60-74	23,193	22,067	1,126	4.9
75+	19,112	18,112	1,000	5.2
Median Age	44	47	33	
Sex				
Male	122,164	103,198	18,966	15.5
Female	126,696	109,241	17,455	13.8
Race/Ethnicity				
White, Not Hispanic	182,558	159,178	23,380	12.8
Black, Not Hispanic	6,323	4,379	1,944	30.7
Asian, Not Hispanic	13,689	11,331	2,358	17.2
Hispanic	37,760	30,839	6,921	18.3
Nativity				
Native - Born in California	118,241	101,093	17,148	14.5
Native - Born Elsewhere	81,720	70,012	11,708	14.3
Foreign Born	48,899	41,334	7,565	15.5
Marital Status				
Never Married	55,573	43,989	11,584	20.8
Married	110,314	98,802	11,512	10.4
Separated	3,959	2,558	1,401	35.4
Widowed	11,073	10,138	935	8.4
Divorced	27,305	22,926	4,379	16.0
Educational Attainment (Persons Age 25+)				
Not a High School Graduate	13,935	10,802	3,133	22.5
High School Graduate	23,375	19,642	3,733	16.0
Some College or Associate's Degree	45,828	39,742	6,086	13.3
Bachelor's Degree	58,545	50,855	7,690	13.1
Master's Degree or Higher	43,192	38,714	4,478	10.4
Employment Status (Persons Age 15+)				
Civilian Labor Force - Employed	124,577	106,396	18,181	14.6
Civilian Labor Force - Unemployed	9,850	8,107	1,743	17.7
Armed Forces	204	95	109	53.4
Not in the Labor Force	71,030	61,399	9,631	13.6

Source: 2013 (5 year) American Community Survey

**Table A.7 - 2. Interstate Geographic Mobility in the Past Year
by Selected Characteristics of Marin Residents**

Characteristic	To: Marin County From: Another State		From: Marin County To: Another State	
	Number	Percent	Number	Percent
Total Movers	3,667	100.0	3,393	100.0
Age Group				
1-17	455	12.4	488	14.4
18-24	562	15.3	1,177	34.7
25-34	1,189	32.4	584	17.2
35-49	862	23.5	649	19.1
50-64	311	8.5	369	10.9
65+	288	7.9	126	3.7
Sex				
Male	1,753	47.8	1,709	50.4
Female	1,914	52.2	1,684	49.6
Race/Ethnicity				
White, Not Hispanic	3,023	82.4	2,976	87.7
Black, Not Hispanic	104	2.8	107	3.2
Asian, Not Hispanic	104	2.8	0	0.0
Hispanic	357	9.7	71	2.1
Nativity				
Native	3,320	90.5	2,917	86.0
Foreign Born	347	9.5	476	14.0
Household Income				
Less than \$20,000	167	4.6	294	8.7
\$20,000 - \$49,999	594	16.2	594	17.5
\$50,000 - \$74,999	282	7.7	348	10.3
\$75,000 - \$124,999	1,275	34.8	462	13.6
\$125,000 - \$199,999	764	20.8	455	13.4
\$200,000+	585	16.0	1,240	36.5
Poverty Status (Persons for whom Poverty Status is Determined)	3,514	100.0	2,551	100.0
Below Poverty	314	8.9	360	14.1
At or Above Poverty	3,200	91.1	2,191	85.9
Marital Status	3,212	100.0	3,059	100.0
Never Married	1,338	41.7	1,765	57.7
Married	1,438	44.8	916	29.9
Separated, Widowed, or Divorced	436	13.6	378	12.4
Educational Attainment (Persons Age 25+)	2,650	100.0	1,728	100.0
Less than a Bachelor's Degree	1,190	44.9	719	41.6
Bachelor's Degree or Higher	1,460	55.1	1,009	58.4
Households	1,182	100.0	1,075	100.0
Family Households	685	58.0	403	37.5
Nonfamily Households	497	42.0	672	62.5

Source: 2013 (5 year) American Community Survey

**Table A.7 - 3. Interstate Geographic Mobility in the Past Year by
Marin Residents**

U.S. Region	To: Marin County From Other States in		From: Marin County To Other States in	
	Number	Percent	Number	Percent
Midwest	552	15.1	112	3.3
Northeast	1,041	28.4	758	22.3
South	817	22.3	1,166	34.4
West	1,257	34.3	1,357	40.0
Total	3,667	100.0	3,393	100.0

Source: 2013 (5 year) American Community Survey

A.8. Foreign Born

Table A.8 - 1. Age by Nativity and Sex in Marin

Age Group	Male	Native Female	Total	Foreign Born			Percent Foreign Born
				Male	Female	Total	
Under 10	14,141	13,879	28,020	426	543	969	3.3
10-19	12,492	12,189	24,681	1,645	1,392	3,037	11.0
20-29	8,392	6,679	15,071	3,593	3,131	6,724	30.9
30-39	9,867	9,627	19,494	4,931	4,864	9,795	33.4
40-49	15,992	15,349	31,341	5,020	4,899	9,919	24.0
50-59	16,979	18,190	35,169	3,020	3,810	6,830	16.3
60-69	12,597	14,258	26,855	2,517	3,157	5,674	17.4
70-79	6,142	6,323	12,465	1,382	1,969	3,351	21.2
80+	3,762	5,921	9,683	766	1,872	2,638	21.4
Total	100,364	102,415	202,779	23,300	25,637	48,937	19.4

Source: 2013 (5 year) American Community Survey

Table A.8 - 2. Race/Ethnicity by Nativity

Race/Ethnicity	Native	Foreign Born			Total	Percent Foreign Born
		Naturalized	Noncitizen	Percent Noncitizen		
White, Not Hispanic	165,282	11,701	7,316	38.5	19,017	10.3
Black, Not Hispanic	5,780	209	403	65.8	612	9.6
Asian, Not Hispanic	5,638	4,887	3,304	40.3	8,191	59.2
Hispanic	18,573	4,466	15,430	77.6	19,896	51.7
Total	202,779	21,770	27,167	55.5	48,937	19.4

Source: 2013 (5 year) American Community Survey

Table A.8 - 3. World Region of Birth Among Immigrants in Marin

Region of Birth	Number	Percent
Africa	701	1.4
Central America	18,690	38.2
North America	2,273	4.6
South America	2,706	5.5
Eastern Asia	3,804	7.8
South Central Asia	287	0.6
South Eastern Asia	4,259	8.7
Western Asia (Middle East)	2,744	5.6
Europe	12,759	26.1
Other	714	1.5
Total	48,937	100.0

Source: 2013 (5 year) American Community Survey

Table A.8 - 4. Top Five Countries of Birth by Citizenship Status in Marin

Country of Birth	Naturalized	Percent Naturalized	Noncitizen	Percent Noncitizen	Total Foreign Born
All Countries	21,770	44.5	27,167	55.5	48,937
Mexico	1,658	17.4	7,845	82.6	9,503
Guatemala	835	15.4	4,576	84.6	5,411
El Salvador	404	17.1	1,961	82.9	2,365
Canada	1,162	51.2	1,109	48.8	2,271
Iran	1,693	77.5	491	22.5	2,184

Source: 2013 (5 year) American Community Survey

Table A.8 - 5. Year of Entry into the U.S. by Citizenship Status in Marin for Marin County Foreign-Born Population

Year of Entry into the U.S.	Naturalized	Percent Naturalized	Noncitizen	Percent Noncitizen	Total Foreign Born
Before 1950	1,250	96.0	52	4.0	1,302
1950-1959	2,257	86.2	362	13.8	2,619
1960-1969	4,030	80.3	989	19.7	5,019
1970-1979	3,756	81.1	875	18.9	4,631
1980-1989	5,043	65.2	2,695	34.8	7,738
1990-1999	3,893	33.8	7,630	66.2	11,523
2000-2011	1,541	9.6	14,564	90.4	16,105
2000-2005	1,404	13.3	9,149	86.7	10,553
2006-2011	137	2.5	5,415	97.5	5,552
Total	21,770	44.5	27,167	55.5	48,937

Source: 2013 (5 year) American Community Survey

A.9. Language

Table A.9 - 1. Language Spoken in Marin Homes and Ability to Speak English by Age

Age Group	Total	Speaks a Language Other than English at Home		Speaks English Less than ``Well''	
		Number	Percent of Age	Number	Percent of Age
5-17	37,843	8,690	23.0	496	1.3
18-24	14,987	5,100	34.0	1,001	6.7
25-64	142,570	34,755	24.4	7,472	5.2
65+	42,305	6,529	15.4	896	2.1
Total	237,705	55,074	23.2	9,865	4.2

Source: 2013 (5 year) American Community Survey

Table A.9 - 2. Top Ten Languages Spoken in Marin Homes Other than English by Ability to Speak English

Language	Number	Percent of Age	Speaks a Language Other than English at Home	
			Speaks English Less than ``Well''	Percent Speaks English Less than ``Well''
All Languages	55,074	100.0	9,865	17.9
Spanish	30,219	54.9	7,942	26.3
French	2,994	5.4	92	3.1
German	2,782	5.1	0	0.0
Persian	1,898	3.4	235	12.4
Italian	1,479	2.7	16	1.1
Russian	1,414	2.6	130	9.2
Chinese	1,109	2.0	87	7.8
Japanese	1,089	2.0	215	19.7
Portuguese	1,083	2.0	118	10.9
Tagalog	1,009	1.8	111	11.0

Source: 2013 (5 year) American Community Survey

Table A.9 - 3. Language Spoken in Marin Homes by Age and Poverty Status in the Past 12 Months

Age Group	Total		Speaks Only English		Speaks a Language Other than English	
	Number	Percent Below Poverty	Number	Percent Below Poverty	Number	Percent Below Poverty
5-17	37,512	3,226	8.6	28,936	1,958	6.8
18-24	13,568	2,021	14.9	8,971	1,251	13.9
25-64	137,664	9,788	7.1	104,309	6,583	6.3
65+	41,581	2,486	6.0	35,342	1,812	5.1
Total	230,325	17,521	7.6	177,558	11,604	6.5

Source: 2013 (5 year) American Community Survey

Table A.9 - 4. Language Spoken at Home and Ability to Speak English by Educational Attainment in Marin

Educational Attainment	Total	Speaks Only English		Speaks a Language Other than English	
		Number	Percent	Number	Percent
Not a High School Graduate	13,935	4,753	3.3	9,182	22.2
High School Graduate	23,375	16,197	11.3	7,178	17.4
Some College or Associate's Degree	45,828	37,427	26.1	8,401	20.3
Bachelor's Degree or Higher	101,737	85,214	59.3	16,523	40.0
Total	184,875	143,591	100.0	41,284	100.0

Source: 2013 (5 year) American Community Survey

-----Table A.9 - 4. Continued-----

Educational Attainment	Speaks a Language Other than English at Home and Speaks English Less than "Well"	
	Number	Percent
Not a High School Graduate	4,831	57.7
High School Graduate	1,801	21.5
Some College or Associate's Degree	821	9.8
Bachelor's Degree or Higher	915	10.9
Total	8,368	100.0

Source: 2013 (5 year) American Community Survey

A.10. Disability

Table A.10 - 1. Age by Sex and Disability Status Among Marin Residents

Age Group	Male		Female		Total	
	With a Disability	Percent of Age	With a Disability	Percent of Age	With a Disability	Percent of Age
Under 5	11	0.2	14	0.2	25	0.2
5-17	653	3.4	328	1.8	981	2.6
18-34	631	3.3	915	5.0	1,546	4.1
35-64	3,565	6.6	3,316	5.5	6,881	6.0
65-74	1,676	15.5	1,477	12.2	3,153	13.8
75+	3,229	43.1	4,713	42.0	7,942	42.5
Total	9,765	8.3	10,763	8.4	20,528	8.4

Source: 2013 (5 year) American Community Survey

Table A.10 - 2. Age by Type of Disability Among Marin Residents

Age Group	Civilian Noninstitutionalized Population	Type of Disability					
		Hearing Difficulty	Percent of Age	Vision Difficulty	Percent of Age	Cognitive Difficulty	Percent of Age
Under 5	14,011	25	0.2	0	0.0	0	0.0
5-17	37,798	217	0.6	99	0.3	592	1.6
18-64	151,919	1,839	1.2	936	0.6	3,439	2.3
65+	41,581	4,883	11.7	1,599	3.8	2,668	6.4
Total	245,309	6,964	2.8	2,634	1.1	6,699	2.7

Source: 2013 (5 year) American Community Survey

-----Table A.10 - 2. Continued-----

Age Group	Civilian Noninstitutionalized Population	Type of Disability					
		Ambulatory Difficulty	Percent of Age	Self-Care Difficulty	Percent of Age	Indep. Living Difficulty	Percent of Age
Under 5	14,011	0	0.0	0	0.0	0	0.0
5-17	37,798	209	0.6	164	0.4	74	0.2
18-64	151,919	3,469	2.3	1,684	1.1	2,449	1.6
65+	41,581	6,290	15.1	2,524	6.1	4,509	10.8
Total	245,309	9,968	4.1	4,372	1.8	7,032	2.9

Source: 2013 (5 year) American Community Survey

Table A.10 - 3. Race/Ethnicity by Disability Status in Marin

Race/Ethnicity	Total	With a Disability	Percent with a Disability
White, Not Hispanic	182,337	16,657	9.1
Black, Not Hispanic	4,541	663	14.6
Asian, Not Hispanic	13,540	877	6.5
Hispanic	36,951	1,850	5.0
Total	245,309	20,528	8.4

Source: 2013 (5 year) American Community Survey

A.11. Veterans

Table A.11 - 1. Age by Sex and Veteran Status in Marin

Age Group	Male			Female			Total		
	Number	Veterans	Percent Veterans	Number	Veterans	Percent Veterans	Number	Veterans	Percent Veterans
18-34	21,378	405	1.9	18,220	162	0.9	39,598	567	1.4
35-54	38,521	2,066	5.4	39,489	267	0.7	78,010	2,333	3.0
55-64	18,765	2,745	14.6	20,980	104	0.5	39,745	2,849	7.2
65-74	11,072	4,632	41.8	12,121	135	1.1	23,193	4,767	20.6
75+	7,556	4,834	64.0	11,556	259	2.2	19,112	5,093	26.6
Total	97,292	14,682	15.1	102,366	927	0.9	199,658	15,609	7.8

Source: 2013 (5 year) American Community Survey

Table A.11 - 2. Race/Ethnicity by Veteran Status in Marin

Race/Ethnicity	Total	Veterans	Percent Veterans
White, Not Hispanic	150,663	13,887	9.2
Black, Not Hispanic	5,402	552	10.2
Asian, Not Hispanic	11,504	228	2.0
Hispanic	27,094	579	2.1
Total	199,658	15,609	7.8

Source: 2013 (5 year) American Community Survey

Table A.11 - 3. Marin Veterans by Period of Service and Poverty Status

Period of Service	Total	Below Poverty	Poverty Rate
Total Veterans	14,921	629	4.2
2 nd Gulf War (9/2001 or Later)	536	64	11.9
1 st Gulf War (8/1990 to 8/2001)	1,186	9	0.8
Vietnam Era	5,329	246	4.6
Korean War	2,312	59	2.6
World War II	2,375	50	2.1
Between Conflicts/Wars	4,186	218	5.2
Pre-World War II	31	0	0.0

Source: 2013 (5 year) American Community Survey

A.12. Fertility

Table A.12 - 1. Women in Marin who had a birth in the past 12 Months by Marital Status and Age

Age Group	Total	Women who had a birth in the past 12 months			
		Number	Percent	Rate per 1,000 Women	Percent Unmarried
15-19	6,371	47	1.5	7	53.2
20-24	4,486	206	6.8	46	51.9
25-29	5,324	705	23.2	132	16.6
30-34	6,093	632	20.8	104	4.3
35-39	8,398	1,081	35.5	129	9.6
40-44	9,781	186	6.1	19	10.8
45-49	10,467	186	6.1	18	0.0
Total	50,920	3,043	100.0	60	13.1

Source: 2013 (5 year) American Community Survey

Table A.12 - 2. Women in Marin who had a Birth in the Past 12 Months by Marital Status and Race/Ethnicity

Age Group	Total	Women who had a birth in the past 12 months			
		Number	Percent	Rate per 1,000 Women	Percent Unmarried
White, Not Hispanic	34,042	1,959	64.4	58	8.5
Black, Not Hispanic	1,104	79	2.6	72	100.0
Asian, Not Hispanic	4,154	217	7.1	52	0.9
Hispanic	9,826	722	23.7	73	16.5
Total	50,920	3,043	100.0	60	13.1

Source: 2013 (5 year) American Community Survey