

# Yolo County High-Tech Industry Evolution

Focus on Post-Recession Recovery

## Q4 -2025 Update

Produced by

National Economic Education Delegation

August 18, 2026

Jon Haveman, Executive Director

415-336-5705 or [Jon@NEEDEcon.org](mailto:Jon@NEEDEcon.org)

## Contents

|                                                                         |   |
|-------------------------------------------------------------------------|---|
| 1. Tech Sector Employment Growth Since 1990                             | 2 |
| 2. Overview of Employment Changes Since the Onset of the COVID Pandemic | 3 |
| 3. Graphical Display of 4-digit Location Quotient Evolution by Industry | 4 |
| 4. Descriptions and References                                          | 9 |



# 1. Tech Sector Employment Growth Since 1990

**Table 1.1: Tech Employment Summary for Q4 -2025**

|               | Share of<br>Total Empl | Current<br>Employment | Inc. Over<br>Last Qtr (#) | Percent Growth Relative to: |           |            |       |       |
|---------------|------------------------|-----------------------|---------------------------|-----------------------------|-----------|------------|-------|-------|
|               |                        |                       |                           | Last Qtr                    | Last Year | .COM Peak* | Q4-07 | Q1-10 |
| Yolo County   | 3.7                    | 4,031                 | 110                       | 2.8                         | 10.2      | 72.6       | 10.2  | 35.4  |
| California    | 8.1                    | 1,491,208             | 2,064                     | 0.1                         | -1.3      | 10.3       | 6.7   | 17.8  |
| United States | 6.9                    | 10,767,597            | -29,675                   | -0.3                        | -0.8      | 17.9       | 15.9  | 24.6  |

Source: BLS, QCEW; Calculations by National Economic Education Delegation

\* .COM Peak refers to the quarter of peak employment for Yolo County during the Tech bubble.

**Figure 1 - 1: Tech Employment Growth Comparison with California and U.S.**

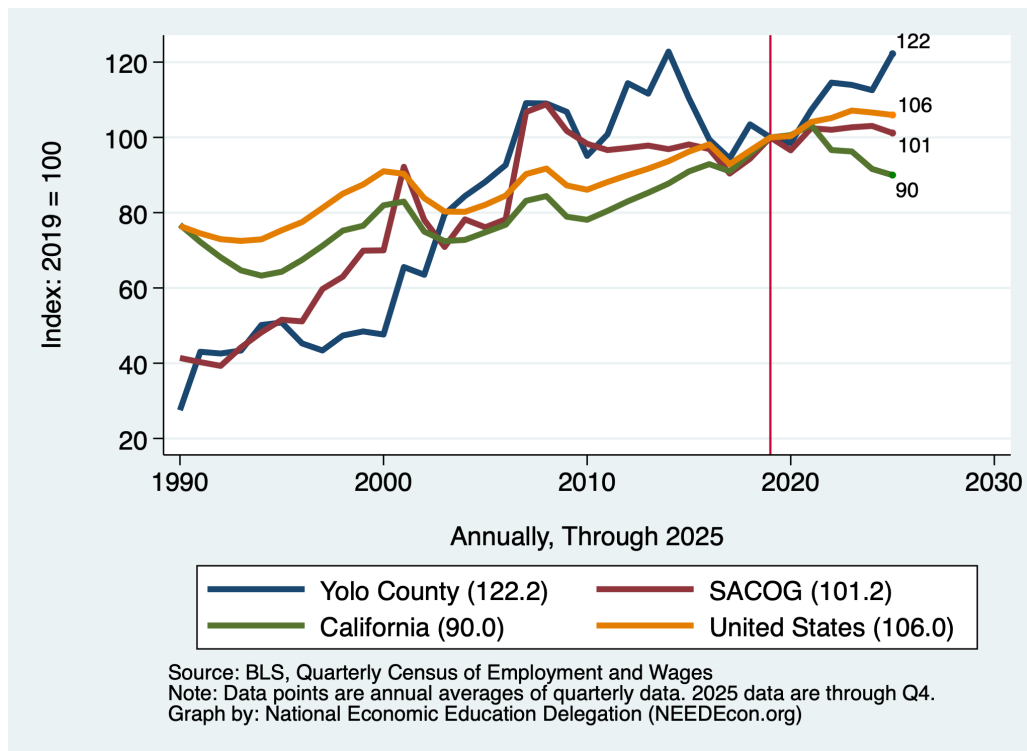


Figure 1 - 2: Employment Growth

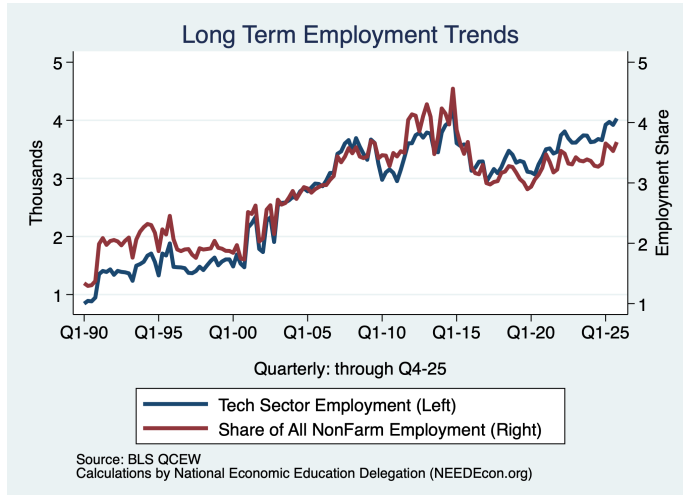
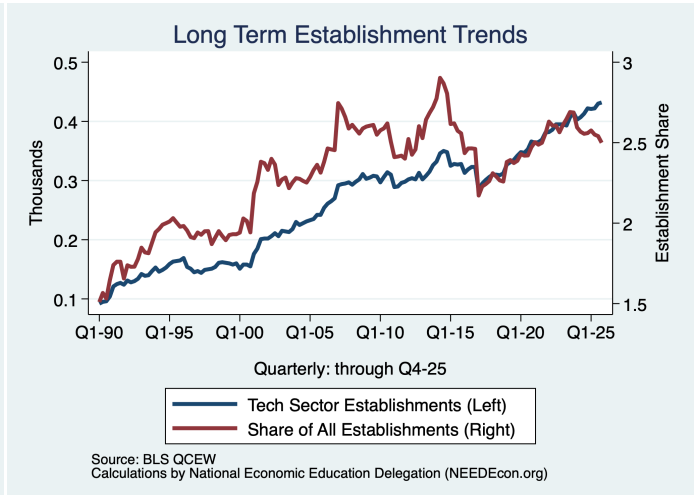
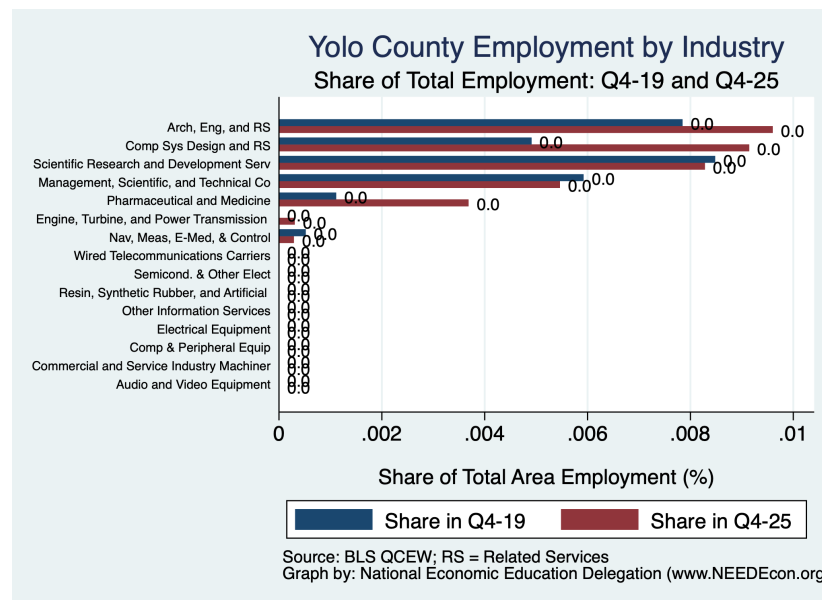


Figure 1 - 3: Establishment Growth



## 2. Overview of Employment Changes Since the Onset of the COVID Pandemic

Figure 2 - 1: 4-Digit Technology Sector Shares



### 3. Graphical Display of 4-digit Location Quotient Evolution by Industry

Graphs present only Q4 data for each year for the 10 4-digit NAICS sectors with the largest share of total employment.

Figure 3 - 1: 5413: Architectural, Engineering, and Related Services

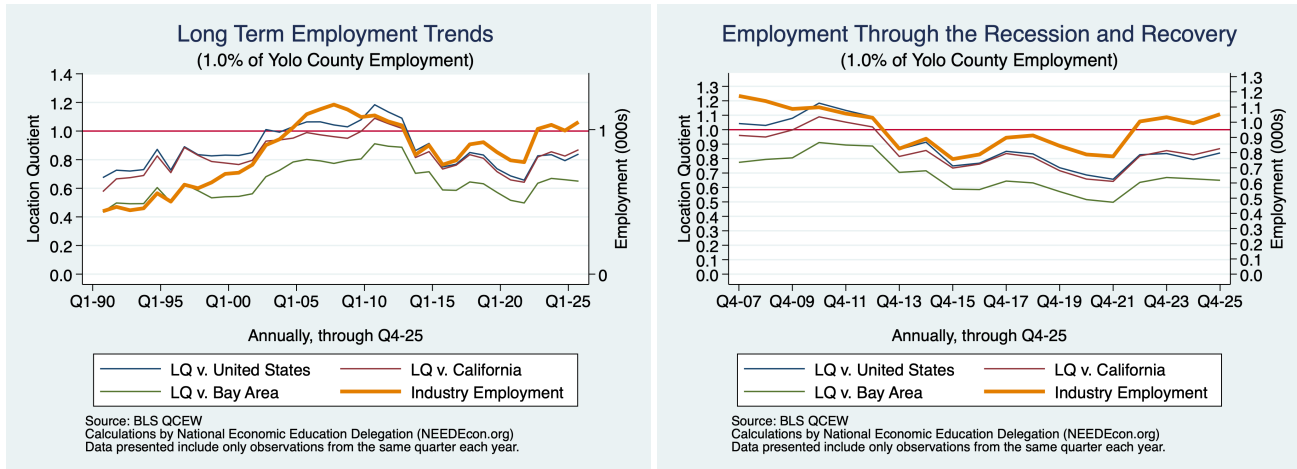


Figure 3 - 2: 5415: Computer Systems Design and Related Services

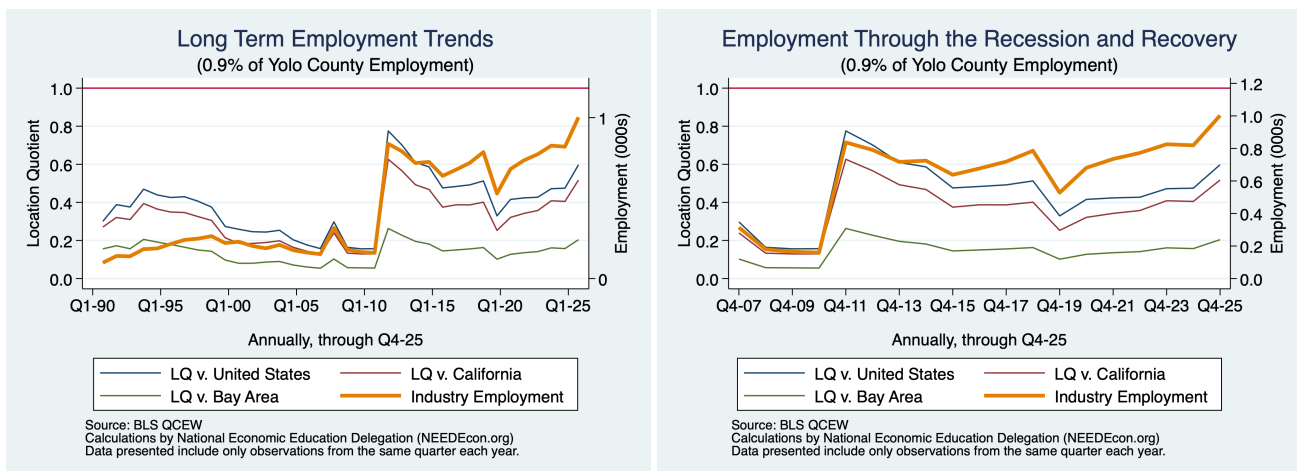


Figure 3 - 3: 5417: Scientific Research and Development Services

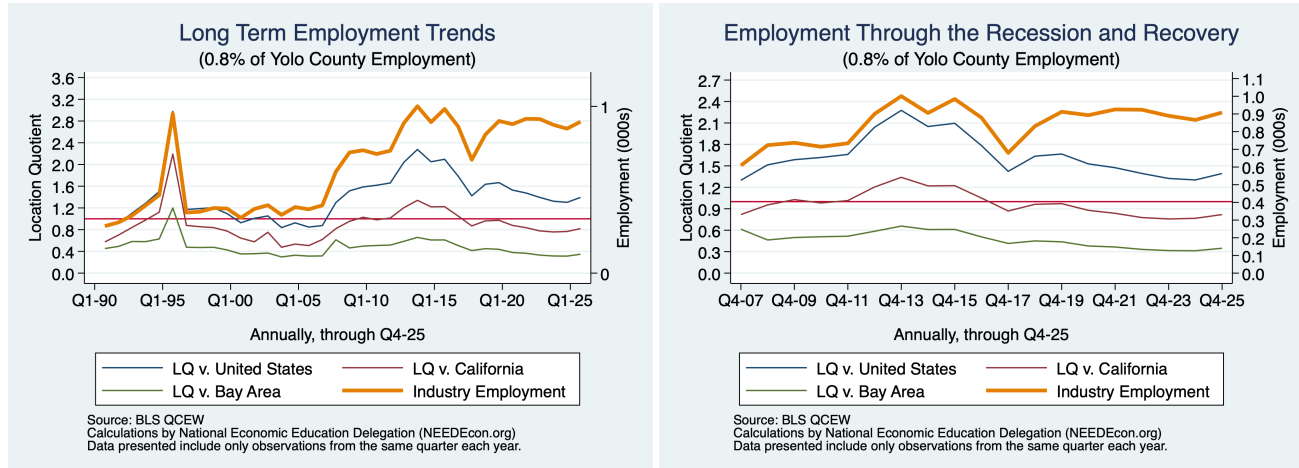


Figure 3 - 4: 5416: Management, Scientific, and Technical Consulting Services

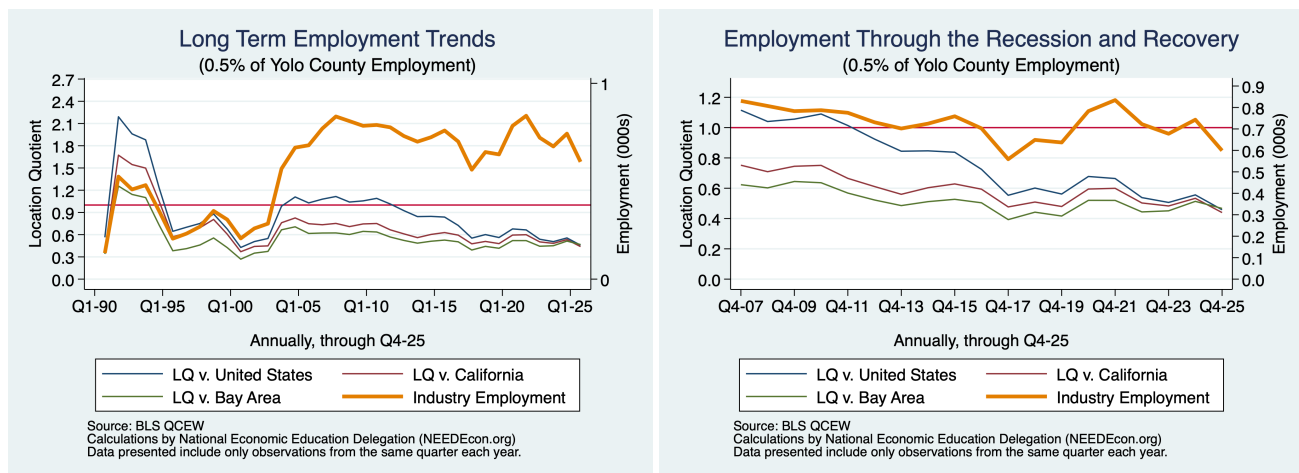


Figure 3 - 5: 3254: Pharmaceutical and Medicine Manufacturing

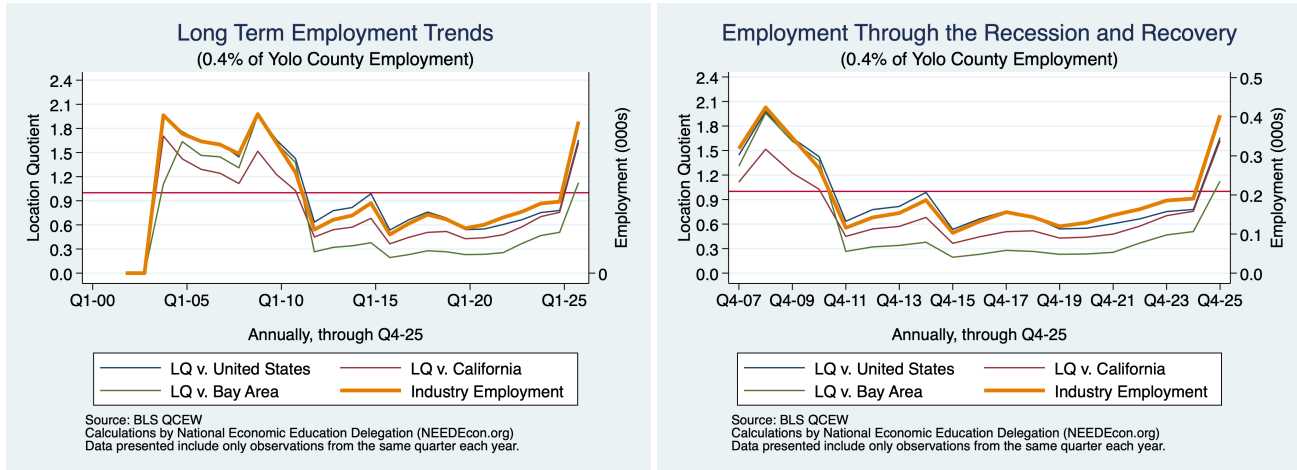


Figure 3 - 6: 3336: Engine, Turbine, and Power Transmission Equipment Manufacturing

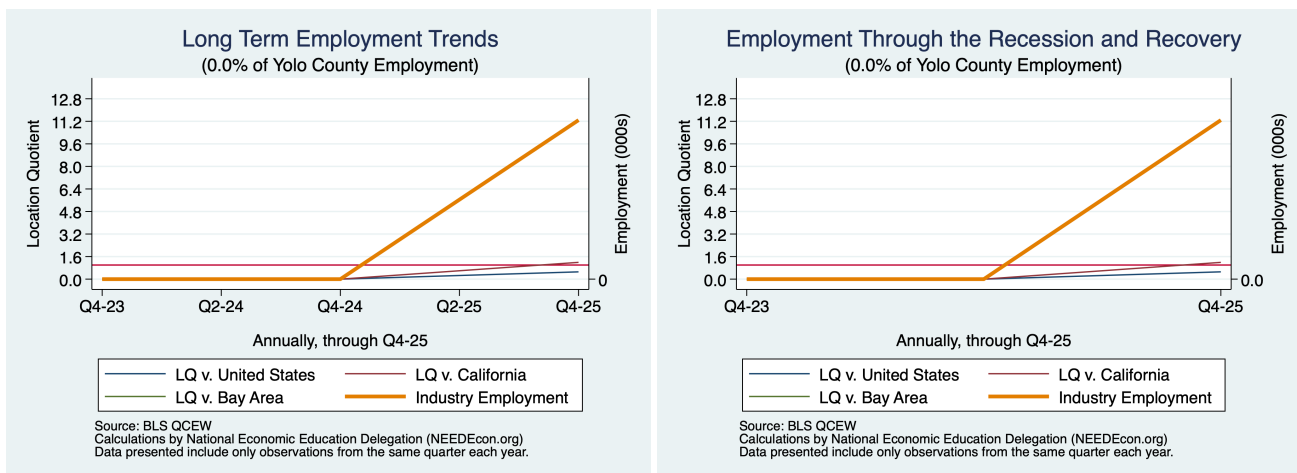


Figure 3 - 7: 3345: Navigational, Measuring, Electromedical, and Control Instruments Manufacturing

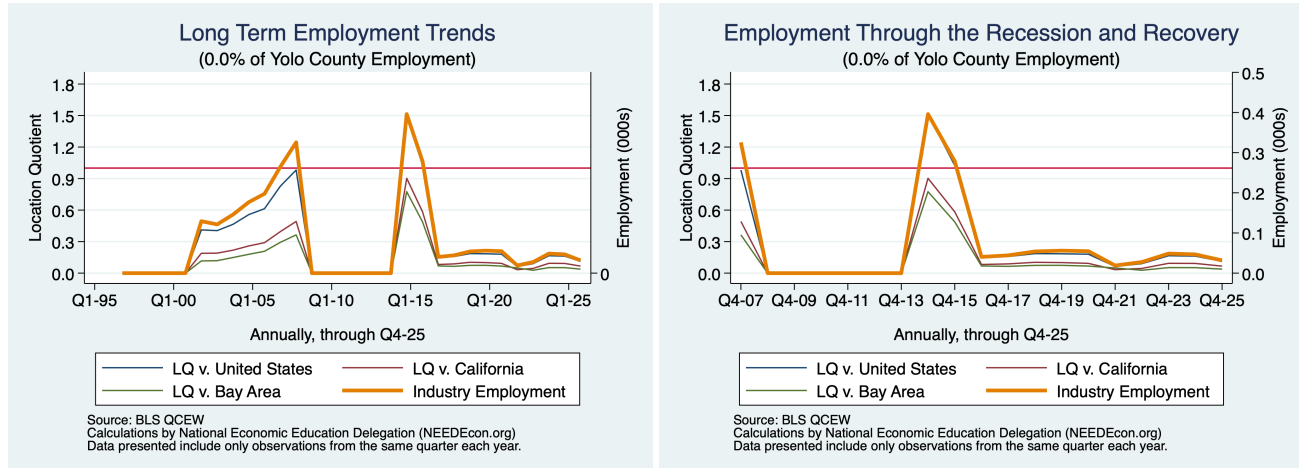


Figure 3 - 8: 3344: Semiconductor and Other Electronic Component Manufacturing

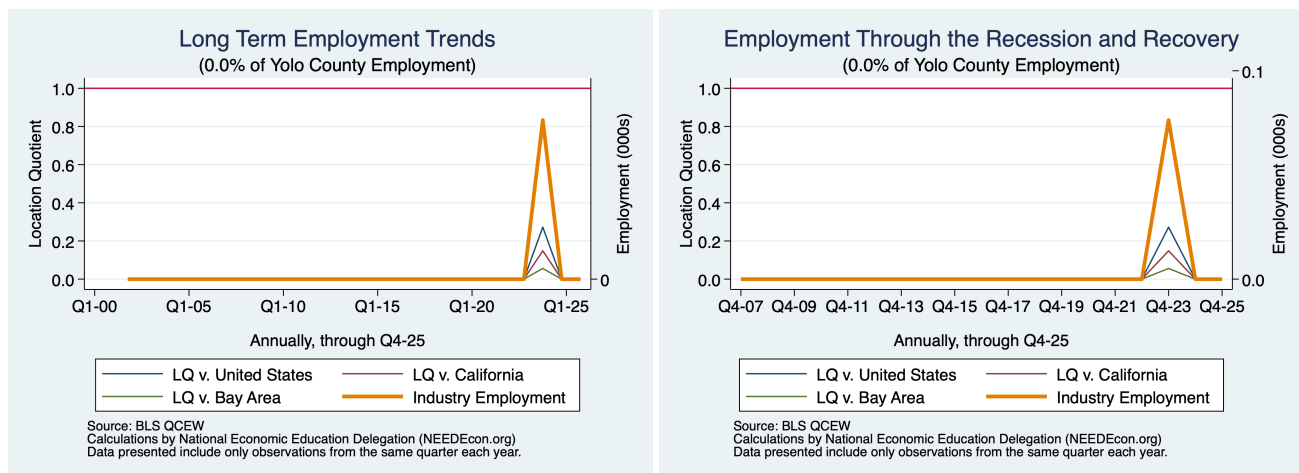


Figure 3 - 9: 3353: Electrical Equipment Manufacturing

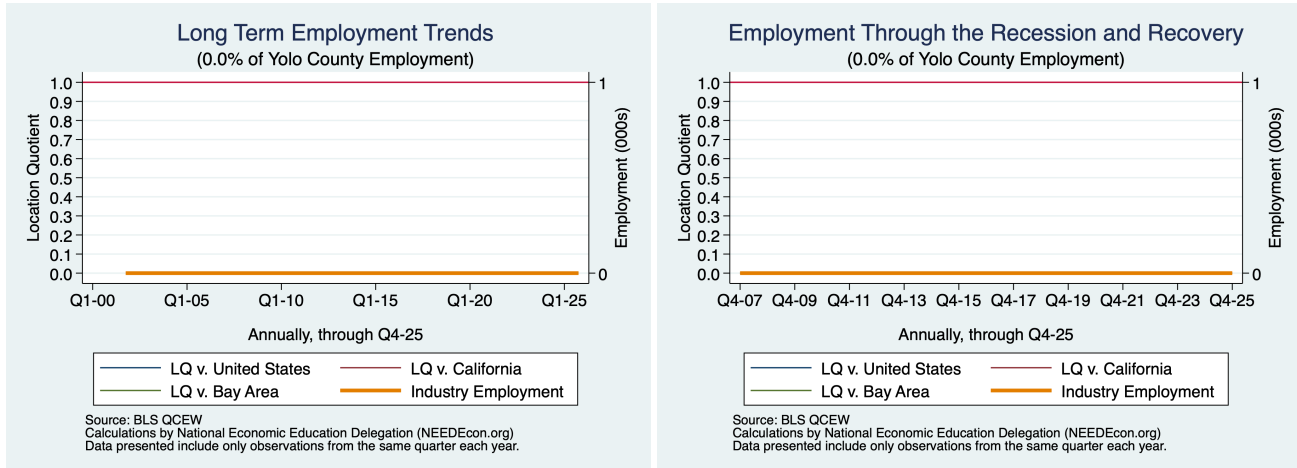
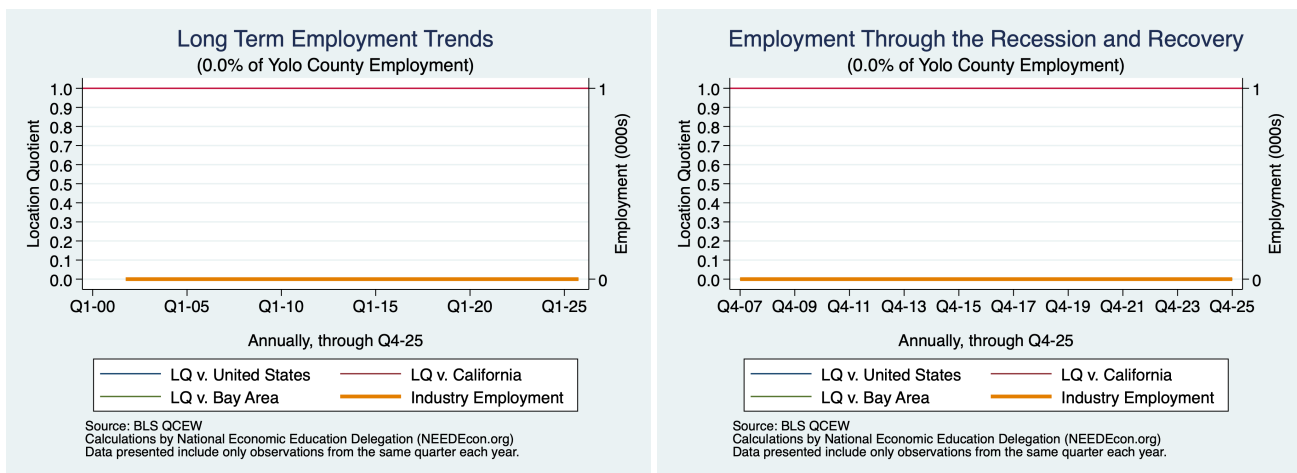


Figure 3 - 10: 3341: Computer and Peripheral Equipment Manufacturing



## 4. Descriptions and References

The contents of this report illustrate the evolution of Yolo County technology employment patterns over time. A particular focus of this report is on the post-Pandemic recovery. This is accomplished by comparing the most recent quarter of data to the same quarter in 2007, the last non-recessionary year for most of California and the United States.

There are several types of data presented. They include:

**Employment Levels:** Employment levels indicate the number of non-farm payroll employees in each industry.

**Employment Shares:** Employment shares indicate the proportion of the region's employment that is accounted for by each industry.

**Location Quotients:** Location quotients are ratios of employment shares. When indicating a location quotient versus the California, it is the region's employment share divided by the employment share in California. Therefore, values greater than one indicate a higher concentration of employment in the industry in question and values less than one indicate a lower concentration. Location quotients are presented versus the Bay Area, California, and the United States, separately.

The data underlying this report are from the Bureau of Labor Statistics: Quarterly Census of Employment and Wages (QCEW). These data are available on a quarterly basis, generally with a 5 month lag from the end of the quarter to the release of the data.

**QCEW:** The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. <http://www.bls.gov/cew/home.htm>

**Time Period:** The data extend from Q1-1990 through Q4 -2025

**Seasonality:** There is a significant seasonal component to many industries. The QCEW data are not seasonally adjusted. Rather than seasonally adjusting the data, most comparisons in this report are between the same quarter in different years. The data presented are therefore the actual employment levels compared across years.

**Tech Sector Definition:** The 4-digit NAICS codes included in the definition of the High Tech sector are listed in the table below. This list is taken from a recent study by the Workforce Information Council: *Exploring the High-Tech Industry* The Workforce Information Council is a partnership between the U.S. Bureau of Labor Statistics, state employment statistics agency representatives and other federal agencies, working together to plan, guide and oversee the nationwide workforce information system. These NAICS sectors were determined as having 2.5 times the national proportion of employment in STEM occupations. Some of the industries identified in the

report were excluded in this report (at the discretion of MEC, see table) as not reflecting the standard notion of the technology sector.

**Table 4.1: 4-Digit NAICS Industries Included in Tech Sector Definition**

| NAICS                                                            | Description                                                                          |
|------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 3241                                                             | Petroleum and Coal Products Manufacturing                                            |
| 3251                                                             | Basic Chemical Manufacturing                                                         |
| 3252                                                             | Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing |
| 3254                                                             | Pharmaceutical and Medicine Manufacturing                                            |
| 3332                                                             | Industrial Machinery Manufacturing                                                   |
| 3333                                                             | Commercial and Service Industry Machinery Manufacturing                              |
| 3336                                                             | Engine, Turbine, and Power Transmission Equipment Manufacturing                      |
| 3341                                                             | Computer and Peripheral Equipment Manufacturing                                      |
| 3342                                                             | Communications Equipment Manufacturing                                               |
| 3343                                                             | Audio and Video Equipment Manufacturing                                              |
| 3344                                                             | Semiconductor and Other Electronic Component Manufacturing                           |
| 3345                                                             | Navigational, Measuring, Electromedical, and Control Instruments Manufacturing       |
| 3346                                                             | Manufacturing and Reproducing Magnetic and Optical Media                             |
| 3353                                                             | Electrical Equipment Manufacturing                                                   |
| 3364                                                             | Aerospace Product and Parts Manufacturing                                            |
| 5112                                                             | Software Publishers                                                                  |
| 5171                                                             | Wired Telecommunications Carriers                                                    |
| 5172                                                             | Wireless Telecommunications Carriers (except Satellite)                              |
| 5174                                                             | Satellite Telecommunications                                                         |
| 5179                                                             | Other Telecommunications                                                             |
| 5182                                                             | Data Processing, Hosting, and Related Services                                       |
| 5191                                                             | Other Information Services                                                           |
| 5413                                                             | Architectural, Engineering, and Related Services                                     |
| 5415                                                             | Computer Systems Design and Related Services                                         |
| 5416                                                             | Management, Scientific, and Technical Consulting Services                            |
| 5417                                                             | Scientific Research and Development Services                                         |
| The following industries are excluded from the studies findings: |                                                                                      |
| 2111                                                             | Oil and Gas Extraction                                                               |
| 2211                                                             | Electric Power Generation, Transmission and Distribution                             |
| 4234                                                             | Professional and Commercial Equipment and Supplies Merchant Wholesalers              |
| 4236                                                             | Household Appliances and Electrical and Electronic Goods Merchant Wholesalers        |
| 4242                                                             | Drugs and Druggists' Sundries Merchant Wholesalers                                   |
| 4861                                                             | Pipeline Transportation of Crude Oil                                                 |
| 5211                                                             | Monetary Authorities-Central Bank                                                    |

Source: BLS - *Exploring the High-Tech Industry*