

SONOMA COUNTY INDICATORS 2009

ECONOMY
ENVIRONMENT
HEALTH
SOCIETY
TOURISM
WORKFORCE



2009

SONOMA COUNTY INDICATORS

The Sonoma County Economic Development Board (EDB) is pleased to present the *2009 Sonoma County Indicators*. This report provides statistics categorized into six areas: economy, environment, health, society, tourism and workforce. Information is provided on a wide array of issues to encourage informed discussion about ways to best ensure continued success in Sonoma County.

The statistics included herein are indicators that measure issues of widespread importance in our community. Good indicators are easily measurable, updated frequently and quickly comprehensible. They are compared with those of comparable counties to gauge and monitor Sonoma County's relative progress.

The EDB has again broadened the scope of the *Indicators*. New this year are trendlines comparing Sonoma County's performance over time with that of similar counties and the State of California average. In addition, information on public transportation, net migration and the relationship between health and social factors are included for the first time.

Despite the current economic climate, Sonoma County's foundation is solid. Highlights and challenges of note in this report:

- Sonoma County's economy is benefiting from linkages from increasing air traffic, but housing remains unaffordable to many residents
- There will be continued demand for a well-educated workforce, but changing demographics may affect their supply
- An eight percent increase in tourism destination spending was highest among competitor counties
- Our environment remains clean, with 352 good air quality days in 2007
- Community health has benefited from meeting the Healthy People 2010 goal for lowering infant mortality rates

The EDB encourages readers to delve into these issues by contacting the agencies and organizations listed throughout this report and by visiting the EDB's website, www.sonomaedb.org. Additionally, suggestions for additional resources are welcomed, as some invaluable organizations may have been missed.



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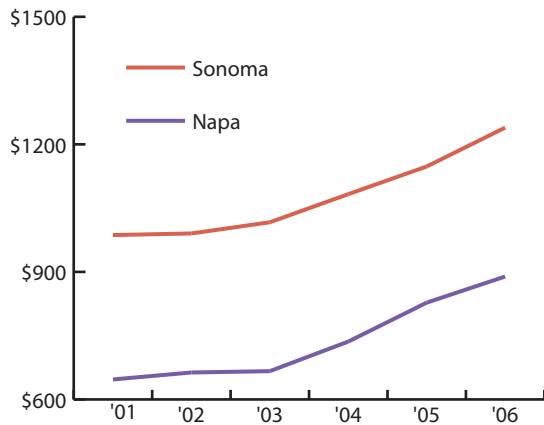
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CHANGE AND SONOMA COUNTY

A trendline is a line which displays changes in data over time. It shows whether a particular time series data set has increased or decreased over a certain period. Trendlines offer a simple way to identify or confirm changes in community indicators over time.

In this section are graphs capturing Sonoma County trends in each of the *Indicators'* six areas of focus: economy, environment, health, society, tourism and workforce. The trendlines offer a glimpse into each area, but for more information on the topics, please refer to the listed sources and pages.

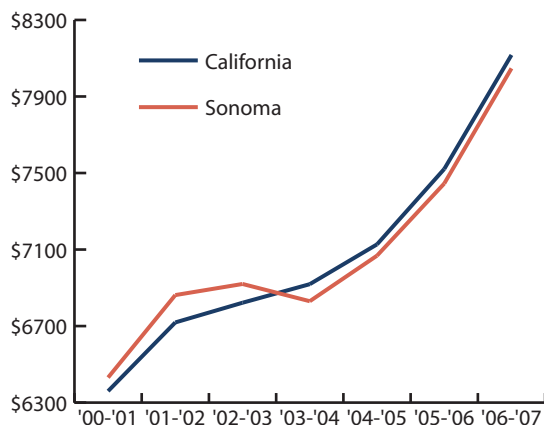
TOTAL DESTINATION SPENDING GENERATED BY TRAVEL SPENDING, 2001-2006 (\$MILLIONS)



For more information on tourism, see page 36.

Source: California Travel Impacts by County, 2006. Prepared for the Division of Tourism, California Trade and Commerce Agency by Dean Runyan & Associates, 2006 (www.visitcalifornia.com)

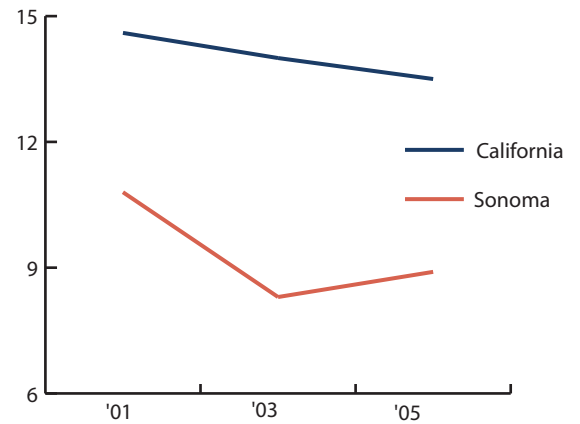
EXPENDITURE PER STUDENT



For more information about society, see page 29.

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

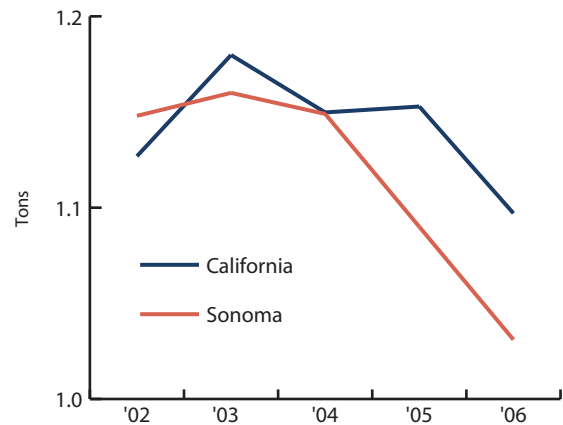
PERCENTAGE OF PEOPLE WITHOUT HEALTH INSURANCE



For more information on health, see page 22.

Source: California Health Information Survey, 2001, 2003 and 2005.

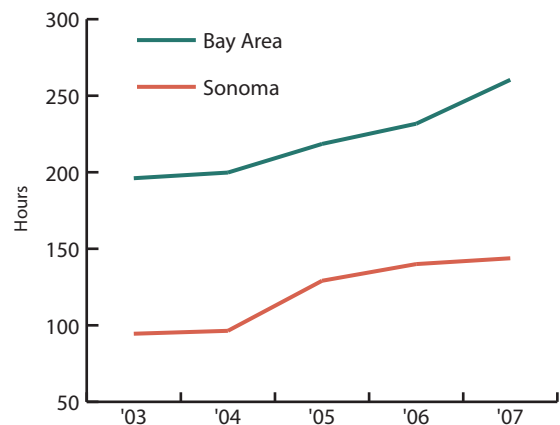
SOLID WASTE GENERATED PER CAPITA



For more information on the environment, see page 15.

Source: Environmental Protection Agency (www.epa.gov)

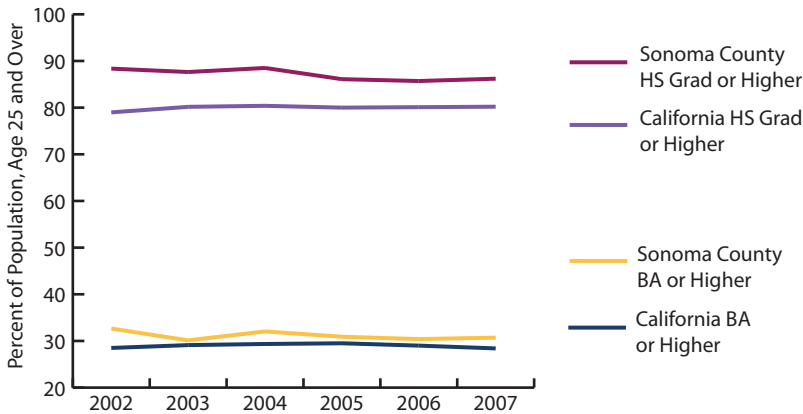
WEEKDAY VEHICLE HOURS OF DELAY PER FREEWAY MILE



For more information on the economy, see page 5.

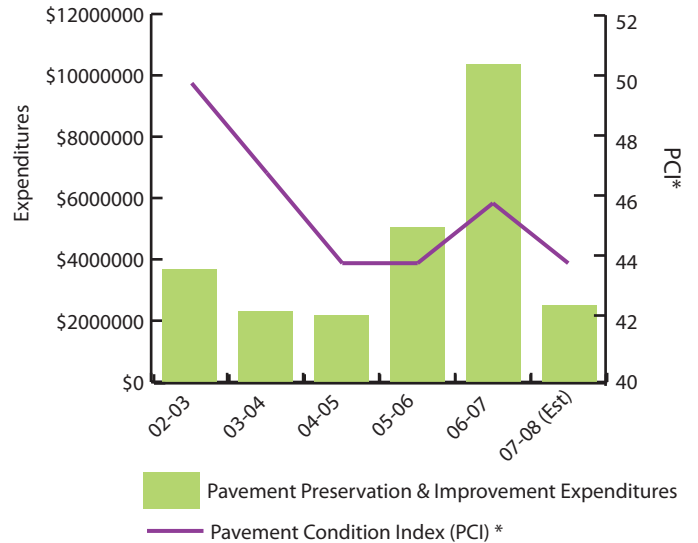
Source: CalTrans, Metropolitan Transportation Commission (www.mtc.ca.gov)

EDUCATIONAL ATTAINMENT



Source: United States Census Bureau, American Community Survey (www.census.gov/acs)

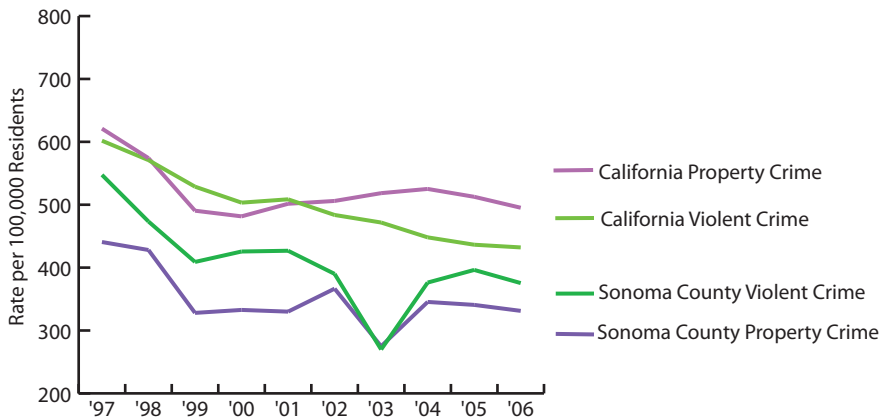
ROADS



*Note: PCI is a system for evaluating pavement surface conditions. Scores between 45-59 on a 100 point scale are rated "Fair." Higher Scores are better.

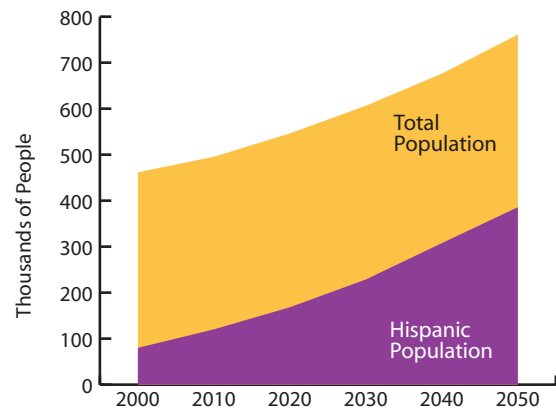
Source: County of Sonoma Department of Transportation and Public Works (www.co.sonoma.ca.us/tpw)

JUVENILE FELONY ARRESTS



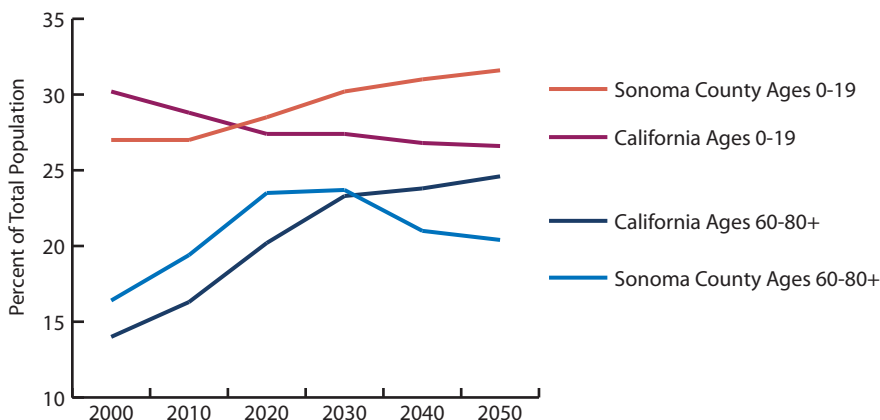
Source: California Department of Justice (<http://ag.ca.gov/cjsc>)

POPULATION PROJECTIONS, (THOUSANDS)



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

POPULATION BY AGE AS PERCENTAGE OF TOTAL POPULATION



For more information on the workforce, see page 42.

Source: California Department of Finance (www.dof.ca.gov)

FOR MORE INFORMATION

California Dept. of Justice
<http://ag.ca.gov/cjsc>

California Dept. of Finance
www.dof.ca.gov

California Dept. of Education
www.cde.ca.gov

California Health Information Survey
www.sonoma-county.org/health

California Trade & Commerce Agency
www.visitcalifornia.com

County of Sonoma Dept. of Transportation & Public Works
www.co.sonoma.ca.us/tpw

Environmental Protection Agency
www.epa.gov

Metropolitan Transportation Commission
www.mtc.ca.gov

United States Census Bureau, American Community Survey
www.census.gov/acs

HOW DOES SONOMA COUNTY COMPARE?

PERFORMANCE SCORECARD	Sonoma County's Performance Relative to Comparable California Counties*	Sonoma County's Performance Relative to California Average	Sonoma County's 2008 Year-Over-Year Performance Relative to California Average	KEY
ECONOMY				<i>The value or trend is...</i>
Unemployment Rate	▲	▲	◀▶	▼ less positive than ▲ more positive than
Firm Establishment Growth	◀▶	▲	◀▶	◀▶ equal to — not directly comparable to
Income Equality	▲	▲	◀▶	...the compared area.
ENVIRONMENT				*COMPARISON COUNTIES
Air Quality	◀▶	—	—	<p>Relative comparisons help gauge Sonoma County's quality of life. In this report, Sonoma County indicators are compared to counties which share similar economic and demographic attributes; these are Marin, Monterey, Napa, San Luis Obispo, Santa Barbara, Santa Cruz and Ventura.</p> <p>Like Sonoma, these counties have strong tourism, agriculture and technology sectors; their residents enjoy a high quality of life; and they are located in proximity to the coast. In addition to these, the State of California average is included in comparisons for further reference.</p>
Waste Per Capita	◀▶	—	—	
SOCIETY				
Educational Attainment	▲	▲	▲	
Crime Rate	▲	▲	◀▶	
TOURISM				
Jobs Created by Tourism	◀▶	—	—	
Tax Receipts Generated by Tourism	◀▶	▲	▲	
WORKFORCE				
Unemployment Rate	◀▶	▲	◀▶	
Percent of Residents Able to Afford Fair-Market Housing	▼	▼	◀▶	
HEALTH				
Percent of Residents with Health Coverage	▲	▲	◀▶	

INDEX REPORT CARD	ECONOMY				EQUITY					ENVIRONMENT					Average Overall Score	
	Unemployment rate	Payroll growth	Establishment Growth	Job Growth	Average Economy Score	Income Distribution	Middle-Income Households	College Enrollment	Educational Attainment	Average Equity Score	Air Quality	Waste Per Capita	Natural Gas Use Per Capita	Electricity Use Per Capita		Average Environment Score
Santa Barbara	8.3	6.0	4.1	4.0	5.6	4.0	2.3	6.3	2.3	3.7	6.3	5.6	8.0	9.0	7.2	5.5
Santa Cruz	4.0	0.0	7.9	0.0	3.0	3.7	2.2	6.0	5.7	4.4	9.7	10.0	10.0	6.3	9.0	5.5
San Luis Obispo	8.6	5.5	6.6	4.0	6.2	6.6	0.0	10.0	2.2	4.7	1.3	5.9	8.4	2.6	4.6	5.1
Ventura	7.7	8.1	0.0	3.0	4.7	10.0	10.0	1.7	2.7	6.1	0.0	1.0	8.7	5.9	3.9	4.9
California	6.0	7.6	4.5	10.0	7.0	5.0	1.1	2.2	2.1	2.6	—	—	—	—	—	4.8
Sonoma	8.6	4.3	4.5	3.0	5.1	7.8	1.9	1.7	2.5	3.5	8.9	5.6	7.0	1.2	5.7	4.8
Monterey	0.0	3.1	3.4	3.0	2.4	5.3	3.8	2.1	0.0	2.8	9.9	4.2	10.0	10.0	8.5	4.6
Napa	8.9	10.0	5.9	2.0	6.7	3.0	1.8	1.2	0.9	1.7	9.8	0.0	7.0	0.0	4.2	4.2
Marin	10.0	0.0	10.0	0.0	5.0	0.0	1.5	0.0	10.0	2.9	10.0	5.0	0.0	1.0	4.0	4.0

HIGHLIGHTS

In this section are indicators such as employment and firm establishment growth. Together with other measures, they represent the scope, type and level of economic activity in Sonoma County. They illustrate strengths, challenges and changes in the local economy.

The Sonoma County Business Executives' Confidence Index fell to a record low of 4.47 in mid-2008, pointing towards more pessimistic perceptions of current and future economic conditions.

After a seven-year decline, occupancy rates on Sonoma County Transit have slowly risen in the past three years, showing increased public transit usage and greater appeal to riders.

Sonoma County's 4.0 unemployment rate for 2007 was below average among comparable regions, but equaled that of the nation in mid-2008, indicating an increased gap between job seekers and jobs and a tougher economic climate.

PAYROLL GROWTH AND UNEMPLOYMENT RATE

What is it?

Payroll growth measures the percentage increase in aggregate compensation over the 2006-2007 one-year period. Unemployment rates measure the percentage of individuals relative to the entire workforce who are not working but able, available and actively seeking work during the week that includes the twelfth of the month.

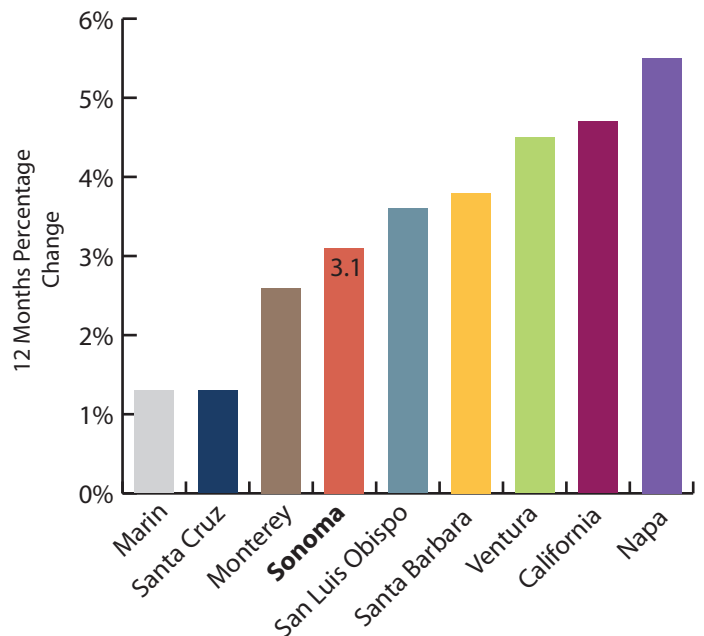
How is Sonoma County doing?

Sonoma County's payroll growth rate of change of 3.1 and unemployment rate of 4.0 for 2007 were below the average among comparable regions. Although Sonoma's unemployment rate has historically been better than the state and national rates, in mid 2008 its seasonally adjusted unemployment rate was equal to that of the nation's.

Why is it important?

Payroll growth provides a measure of general business performance and the level of available consumption and savings activity in the local economy. Higher unemployment rates represent increased gaps between job seekers and available jobs (frictional unemployment) and/or an endemic dearth of jobs (structural unemployment). Higher unemployment rates also typically portend economic downturns and decrease the ability of members of the workforce to generate income.

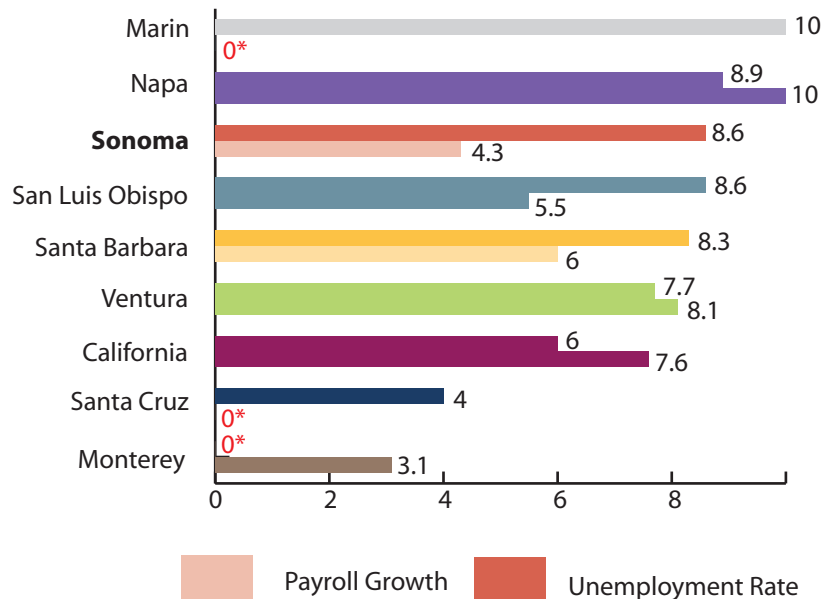
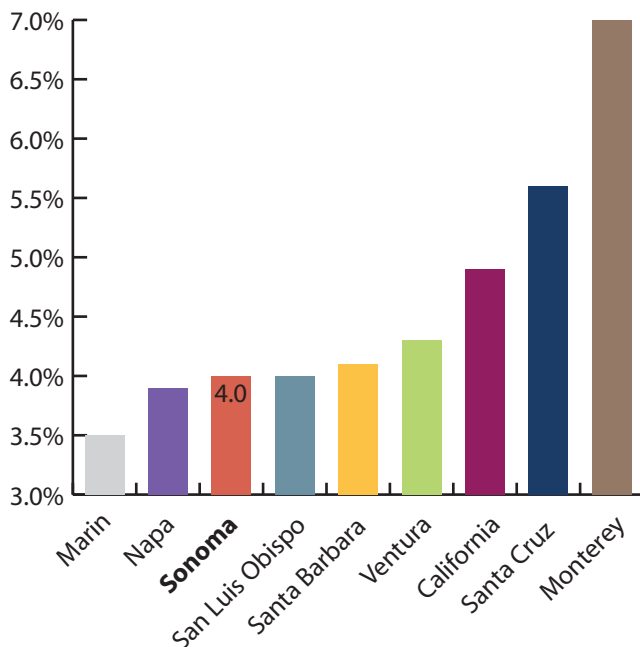
PAYROLL GROWTH, 2007



Source, all data: Bureau of Labor Statistics (www.bls.gov)

PAYROLL GROWTH AND UNEMPLOYMENT RATE SCORES*

UNEMPLOYMENT RATE, 2007 MOVING AVERAGE



*Note: Scores reflect a relative ranking between 0 and 10. A score of 0 simply signifies that a county performed the worst among its peers, while 10 means a county performed the best. The statistics on which the rankings are based are illustrated in the graphs on this page. For methodology and notes, see page 48.

JOB AND ESTABLISHMENT GROWTH

What is it?

Job growth captures the percentage increase in the average annual employment from 2006 to 2007. Establishment growth tracks the year-over percentage increase in firms from 2006 to 2007.

How is Sonoma County doing?

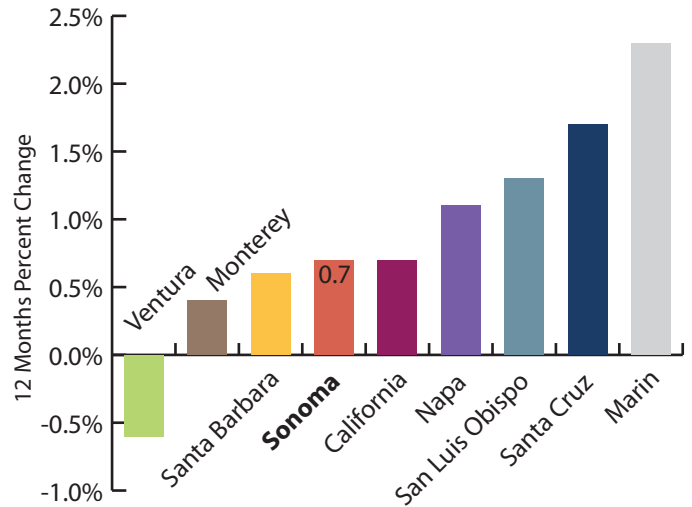
One of the major challenges facing Sonoma County's economy, the data suggests, is job growth. **Over the course of the year, Sonoma County experienced a 0.7 percent increase in total jobs**, while Marin County posted a 2.3 percent increase. Despite low job growth, Sonoma County boosted its total number of firms by 0.6 percent year-over in 2007, placing it in the middle of comparison counties' rates of growth.

Why is it important?

Job growth illustrates an economy's ability to generate more employment opportunities. Because jobs are the primary source of income for most residents and employment typically moves in line with business patterns, this metric often reflects overall economic performance.

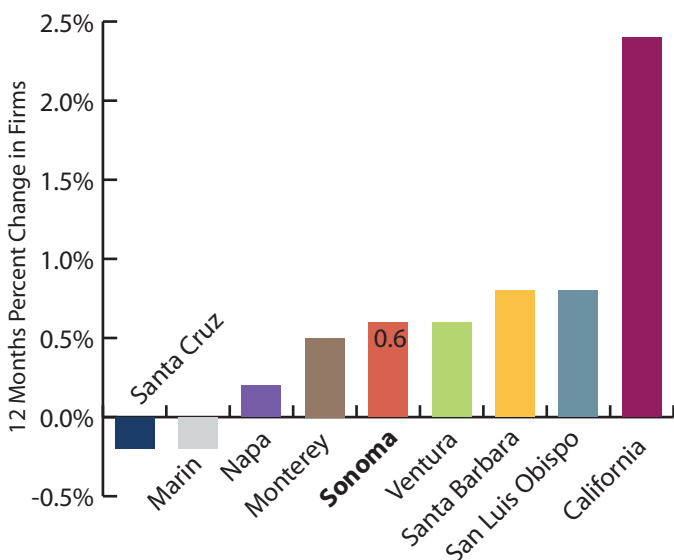
Establishment growth also can be viewed as an indicator of the overall business climate, because it captures both the creation and shuttering of firms. Higher unemployment rates also typically portend economic downturns and decrease the ability of members of the workforce to generate income.

JOB GROWTH, 2007



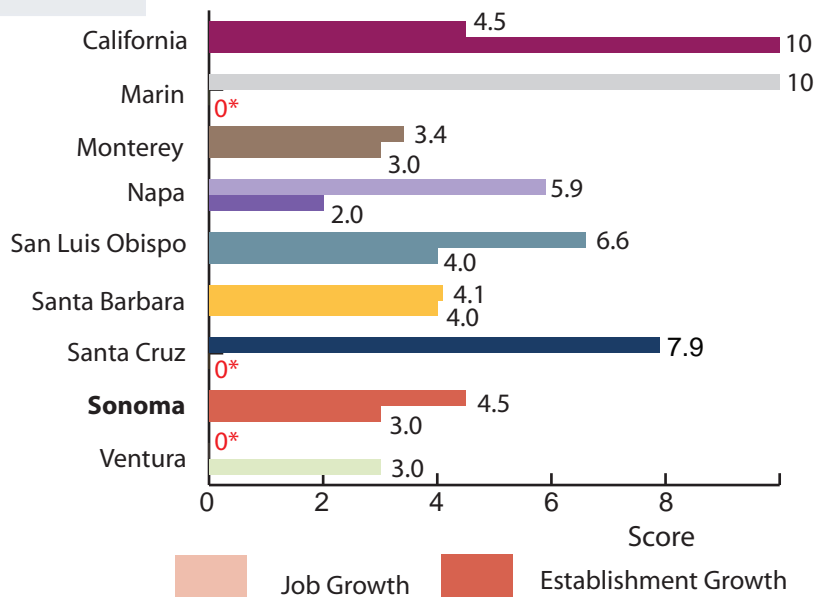
Note: Total nonfarm employees. Not seasonally adjusted.
Source, all data: Bureau of Labor Statistics (www.bls.gov)

FIRM ESTABLISHMENT GROWTH, 2007



Note: 2007 data is preliminary.

JOB AND ESTABLISHMENT GROWTH SCORES*



*Note: Scores reflect a relative ranking between 0 and 10. A score of 0 simply signifies that a county performed the worst among its peers, while 10 means a county performed the best. The statistics on which the rankings are based are illustrated in the graphs on this page. For methodology and notes, see page 48.

INCOME

What is it?

Income is the financial gain received in exchange for labor or services, from property sales or earnings on investments. "Middle-income households" are defined by the Brookings Institution as those with incomes between 80 and 120 percent of the median household income for each county. This percentage statistic is generated using a linear interpolation of U.S. Census Bureau household income data, which defines a household as all the people who occupy a housing unit. "Income distribution" is the ratio of the region's mean household income to median household income, where the first measure is the arithmetic average (and thus potentially skewed by outliers) and the latter divides households into two equal segments, with the first half earning less than the median household income and the other half earning more.

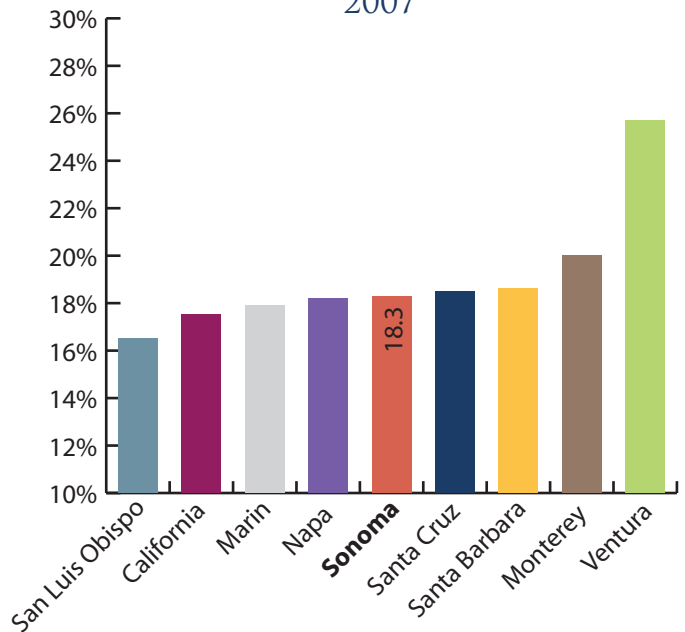
How is Sonoma County doing?

Sonoma County ranked second in income distribution and fifth in percentage of middle-income households. These statistics combined suggest that Sonoma County has a more equitable distribution of income than most of the comparison counties, which are among the wealthiest in the state. Nevertheless, poverty, income inequality, and increasing economic pressure on low- and middle-income families remain substantial concerns for Sonoma County.

Why is it important?

Income equality appeals to society's sense of fairness. High levels of income inequality can limit upward mobility and corrode the social and political climate of an area.

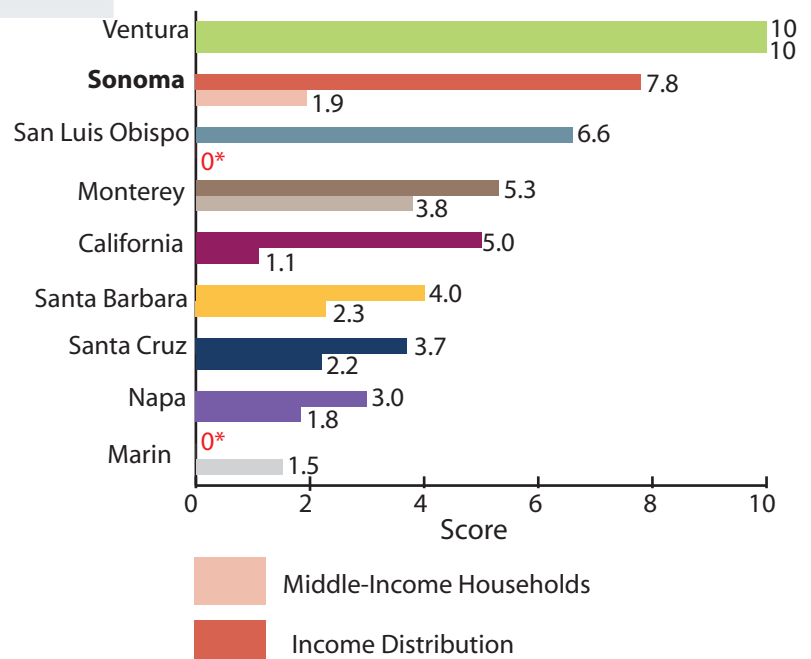
MIDDLE-INCOME HOUSEHOLDS, 2007



Note: Data based on linear interpolation.

Source, all data: U.S. Census Bureau, 2007 American Community Survey (www.census.gov)

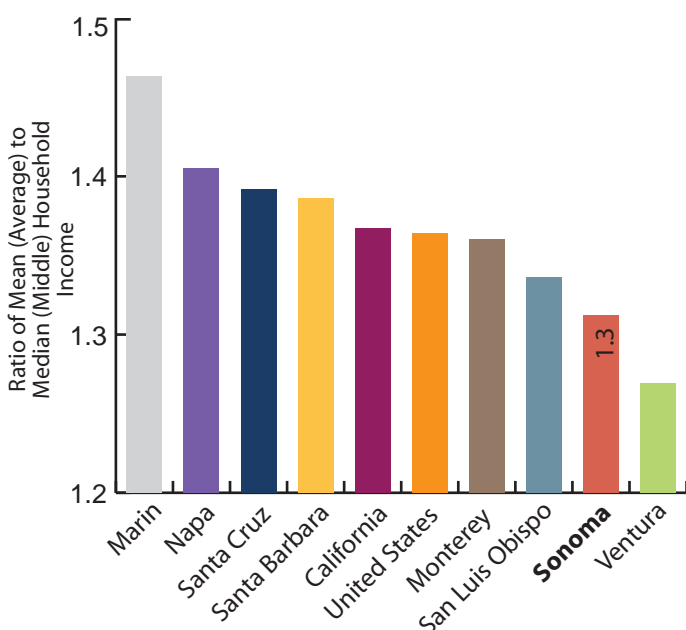
MIDDLE-INCOME HOUSEHOLDS AND INCOME DISTRIBUTION SCORES*



*Note: Scores reflect a relative ranking between 0 and 10. A score of 0 simply signifies that a county performed the worst among its peers, while 10 means a county performed the best. The statistics on which the rankings are based are illustrated in the graphs on this page. For methodology and notes, see page 48.

INCOME DISTRIBUTION, 2007

(A LOWER SCORE IS A MORE EQUITABLE DISTRIBUTION)



BUSINESS CLIMATE

What is it?

A business climate indicates how government policies, relationships and communities support business development. A good climate allows businesses to conduct affairs with minimal interference while accessing customers and quality inputs at low costs. The Sonoma County Business Confidence Index gauges local executives' perceptions of current and future economic conditions, both locally and nationwide. The index is measured on a 10-point scale; a score of 1 represents the lowest confidence level and 10 the highest. *Forbes* magazine's annual "Best Places for Business" list ranks selected regions across the country using characteristics it believes are important to success. The Federal Reserve Bank of Cleveland's "Dashboard Indicators" report rated the economic performance of 118 comparable regions during the period of 1994-2004.

How is Sonoma County doing?

Forbes ranked Sonoma County the 182nd best place for business nationwide in 2008, an improvement of three places year-over. However, the ranking peaked at second in 2002. Sonoma's fall follows the statewide trend—*Forbes* noted that California has "runaway business costs" due to high taxes and costs resulting from labor, office space and workers' compensation. Local executives surveyed for the Economic Development Board's quarterly Business Confidence Report indicated pessimism and challenges for the local economy. **The summer 2008 Business Confidence Index dropped to 4.47, declining 21.4 percent from fall's 5.69 score.** Business executives' confidence within their industries fell from 5.6 to 4.7. Scores greater than 6 are considered positive. The Federal Reserve Bank of Cleveland gave the Santa Rosa MSA high rankings in its 2006 report, with local productivity ranked 11th and real output 12th among 118 other areas.

Why is it important?

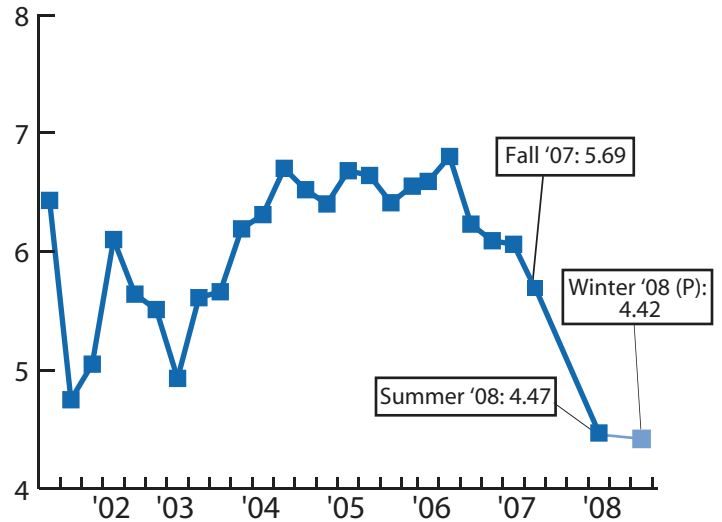
A strong and accommodating business climate is vital to attract and retain businesses and entrepreneurs in Sonoma County. A region that is desirable for business should experience strong job growth and healthy economic conditions.

Note: The definition of "business climate" provided by the International Economic Development Council.

FEDERAL RESERVE BANK OF CLEVELAND 2006 RANKING OF 118 METROPOLITAN AREAS (LOWER NUMBERS ARE BETTER)		
SANTA ROSA MSA	% CHANGE	RANK
Employment, 1994-2004	25.6	25
Real Output, 1994-2004	66.2	12
Per Capita Income, 1993-2003	50.8	24
Productivity, 1994-2004	32.3	11
Skilled Workforce Score	N/A	24
Income Equality Score	N/A	5

Note: MSA = Metropolitan Statistical Area. The Santa Rosa MSA is a good proxy for Sonoma County.
Source: Federal Reserve Bank of Cleveland (www.clevelandfed.org/Research/Workpaper/2006/wp06-05.pdf)

BUSINESS EXECUTIVE CONFIDENCE, SONOMA COUNTY, 2001-2008



Note: P = Projected
Source: Sonoma County Economic Development Board (www.sonomaedb.org)

FORBES' BEST PLACES FOR BUSINESS, 2008 (SCALE = 200; LOWER SCORES ARE BETTER)					
	San Luis Obispo	Santa Barbara	San Francisco	Sonoma	Santa Cruz
OVERALL	97	112	167	182	188
College	156	64	21	176	134
Cost of Doing Business	187	188	185	76	180
Cost of Living	175	191	200	194	199
Crime Rate	35	32	97	49	99
Culture/Leisure	79	67	2	54	45
Educational Attainment	72	48	5	55	22
Income Growth	21	60	182	153	158
Job Growth	47	48	197	127	182
Net Migration	83	194	198	149	200
Population	259,500	406,900	1,689,000	43,500	253,300

Source: Forbes Magazine (www.forbes.com)

FOR MORE INFORMATION

Sonoma County Economic Development Board
www.sonomaedb.org

Federal Reserve Bank of San Francisco
www.frbsf.org

INCOME DISPARITY

What is it?

Income disparity is a descriptive term for inequities in income or wealth distribution between socioeconomic groups. A Gini coefficient provides a measure of inequality of income distribution. Scaled between 0 (perfect equality) and 1 (perfect inequality), lower coefficients indicate more equitable distributions of wealth. The poverty line attempts to capture the minimum income needed to maintain a tolerable life. The United States 2007 poverty threshold for a family of four with two children was \$21,027, as determined by the Department of Health and Human Services.

How is Sonoma County doing?

The Gini coefficient for Sonoma is lower than those of the United States and California. The national Gini coefficient continues to rise, indicating increasing inequality. The same is likely the case in Sonoma County; from 1989-1999, the county poverty rate rose 6.6 percent as real median household income increased 21.6 percent and real per capita income increased roughly 13 percent. **Currently, the majority of Sonoma County households have incomes between \$50,000-\$74,999.** In 2007, 13 percent of the United States' population was below the poverty line; in Sonoma County, 8.9 percent. However, official poverty calculations assume that a family earning a given income is equally well off anywhere in the country. Thus, due to above-average costs of living in Sonoma, the Public Policy Institute of California's adjusted poverty rate for the county is 11.5 percent.

Why is it important?

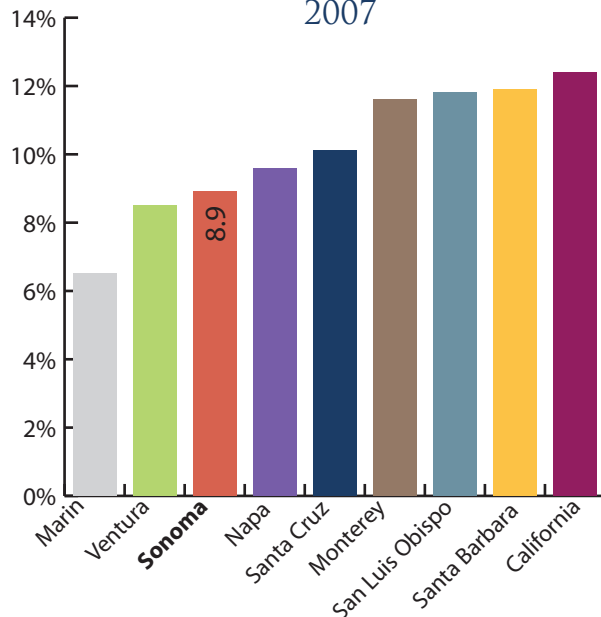
Per capita income shows that wealth is growing in the county, but does not indicate distribution. Unequal income distribution can lessen social cohesion and decrease the health of an area. A widening gap between rich and poor may indicate changes in demographics in a community, such as education, race and gender. A high poverty rate indicates a weakening economy, underdeveloped businesses in the community and a scarcity of employment.

Note: U.S. Department of Commerce & Census Bureau poverty data noted in the text.

Marin	0.497
California	0.469
Santa Barbara	0.469
San Luis Obispo	0.468
United States	0.467
Santa Cruz	0.463
Napa	0.462
Monterey	0.454
Sonoma	0.438
Ventura	0.432

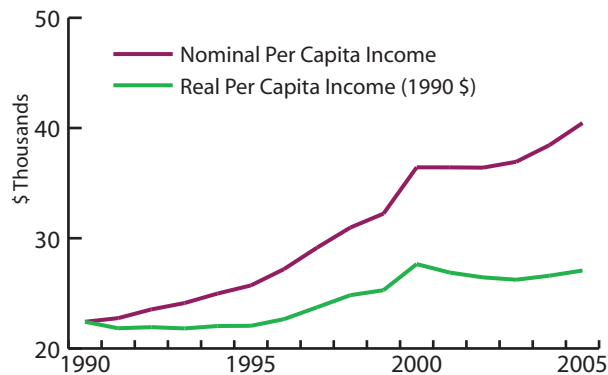
Source: U.S. Census Bureau, 2007 American Community Survey (www.census.gov)

PERCENT BELOW POVERTY LINE, 2007



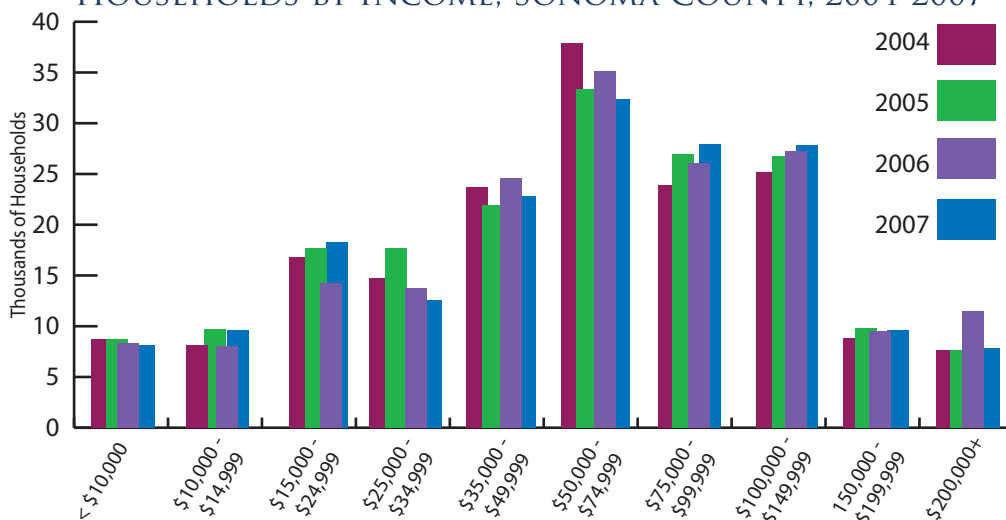
Source: U.S. Census Bureau, 2007 American Community Survey, (www.census.gov)

PER CAPITA INCOME, SONOMA COUNTY



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

HOUSEHOLDS BY INCOME, SONOMA COUNTY, 2004-2007



Note: Not adjusted for inflation.

Source: U.S. Census Bureau (www.census.gov)

MAJOR INDUSTRIES

What is it?

The North American Industry Classification System identifies the defining characteristics of major industries. It defines 12 standard industry divisions; of these sectors, the largest employers in Sonoma County were chosen to represent the local major industry composition.

How is Sonoma County doing?

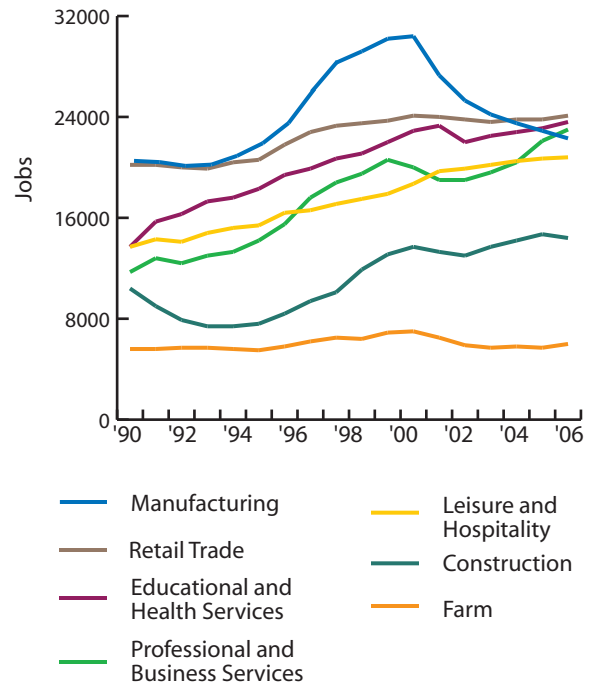
Over the period of 1990-2007, Sonoma County experienced growth in most employment clusters. **The fact that local payrolls have not contracted across the board demonstrates a relatively sound economy.** The largest employment cluster is Trade, Transportation and Utilities with 18 percent of the workforce; it employs the greatest number of workers in retail. Of the clusters included here, Agriculture and Manufacturing decreased payrolls in the past five years.

Moody's Economy gave Sonoma County an average economic diversity index score of 0.48 for 2007, comparing the local economic structure with that of the United States, which is rated as 1. A rating of 1 means the area has the same industrial structure as the nation, while a 0 indicates the opposite. For 2008, the largest private employer in Sonoma County was Kaiser Permanente, which offers health services. Health and education-related services are prevalent among the largest county employers.

Why is it important?

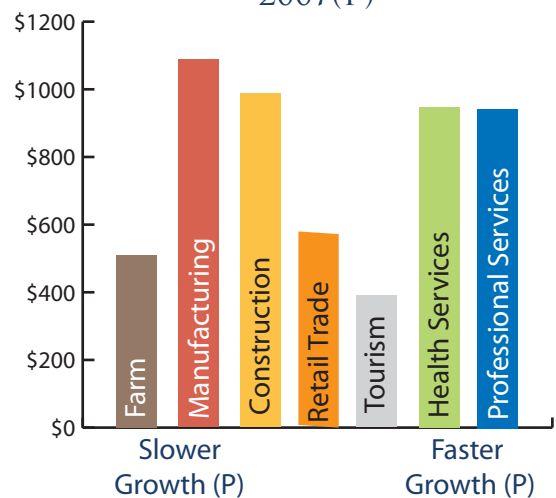
Changes in the size of the sectors that comprise Sonoma County's economy affect the needs for workforce and economic development and strategic planning. A decline in a major sector can reduce incomes and quality of life.

EMPLOYMENT IN SELECTED CLUSTERS, 1990-2007



Source: Employment Development Department (www.calmis.ca.gov)

AVERAGE WEEKLY WAGE FOR SELECTED CLUSTERS, 2007(P)



Note: P=Projected. 2007 wages are projected. Projected growth rates from Moody's Economy, June 2008. Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (www.bls.gov)

FOR MORE INFORMATION

Innovation Council Economic Strategic Plan and Economic Forecast
 Sonoma County Economic Development Board
www.sonoma-county.org/edb/innovation.htm

MAJOR PRIVATE EMPLOYERS, 2008	
Kaiser Permanente	2,300
St. Joseph Health System	2,166
Agilent Technologies	1,400
Medtronic CardioVascular	1,200
Sutter Medical Center	1,097
Safeway, Inc.	1,082

Source: North Bay Business Journal, February 2008; Moody's Economy.com June 2008 Sonoma County Report

MOBILITY

What is it?

Mobility in this context is the ability to move freely within the county's transportation infrastructure. Transportation-related measures, including average commute time, mode of travel and weekday vehicle hours of delay per freeway mile are included in this indicator. The latter offers a general indication of traffic congestion by showing the amount of time taken by a traffic stream to travel one freeway mile during peak times.

How is Sonoma County doing?

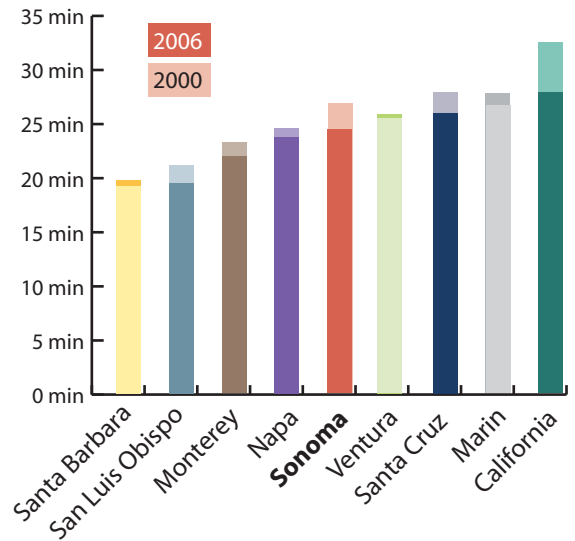
The average Sonoma County commute time fell 2 minutes to 24.4 minutes over 2000-2006, following trends in state and comparison counties, excepting Santa Barbara and Ventura. However, continuing population growth has yet to be matched by an increase in the capacity of the transportation system. Consequently, county freeways experience greater levels of utilization than comparable counties, and residents have longer commutes.

In 2006, roughly 75 percent of Sonoma County residents drove their vehicles alone to work. The large number of people driving alone to work may explain the county's average performance among regional commute times. **Weekday vehicle hours of delay per county freeway mile have slowly increased from 94.5 in 2003 to 143.8 in 2007.** This increase follows Bay Area trends and remains lower than those in nearby Marin and San Francisco counties.

Why is it important?

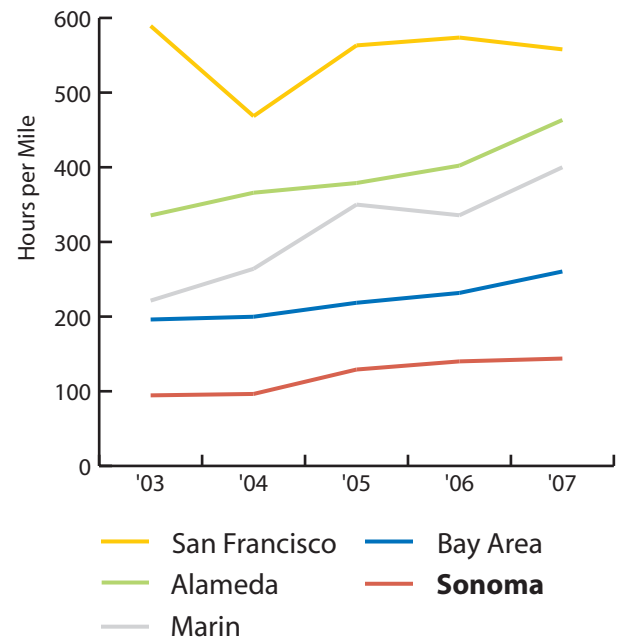
Infrastructure is vital to a region's economic development and quality of life. Longer commute times and increased traffic congestion lessen Sonoma County's desirability for business expansion and location.

AVERAGE COMMUTE TIME, 2000-2006



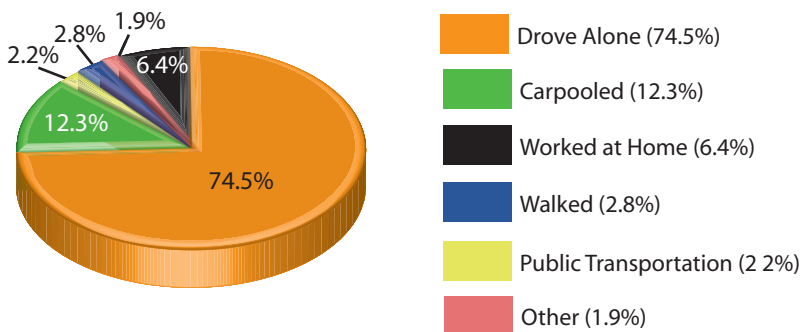
Source: U.S. Census Bureau, 2006 American Community Survey (www.census.gov/acs/www/index.html)

WEEKDAY VEHICLE HOURS OF DELAY PER FREEWAY MILE



Source: Metropolitan Transportation Commission (www.mtc.ca.gov)

COMMUTING TO WORK, 2006



Source: U.S. Census Bureau, 2006 American Community Survey (www.census.gov/acs/www/index.html)

MOBILITY

What is it?

Mobility in this context focuses on air, infrastructure and alternate transportation indicators. Sales tax expenditures indicate funding available to support public transportation. STS Airport passenger loads measure air traffic activity in and out of the county. Bicycle routes indicate the availability of sustainable alternatives to less environmentally-friendly commuting modes.

How is Sonoma County doing?

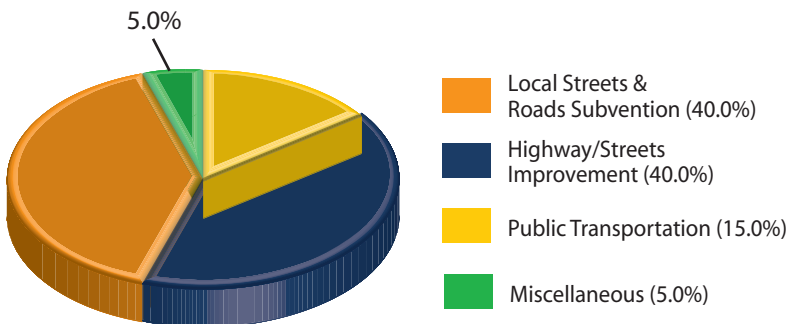
The Sonoma County Transportation Authority (SCTA) has planned the local portion of the North Bay regional bikeway system. **The bicycle commute rate is 0.8 percent countywide**, which is slightly lower than the regional average. **\$70.5 million of Sonoma County's Measure M 1/4-cent self-help sales tax is and will be put towards public transit services from 2005-2025.**

Air traffic resumed to and from Sonoma County after a five year interim period. **Horizon Air traffic at the STS Sonoma County Airport totaled 53,589 during March-December 2007** and 68,866 for January-August 2008. The majority of flight service in 2008 has been to and from Los Angeles International Airport.

Why is it important?

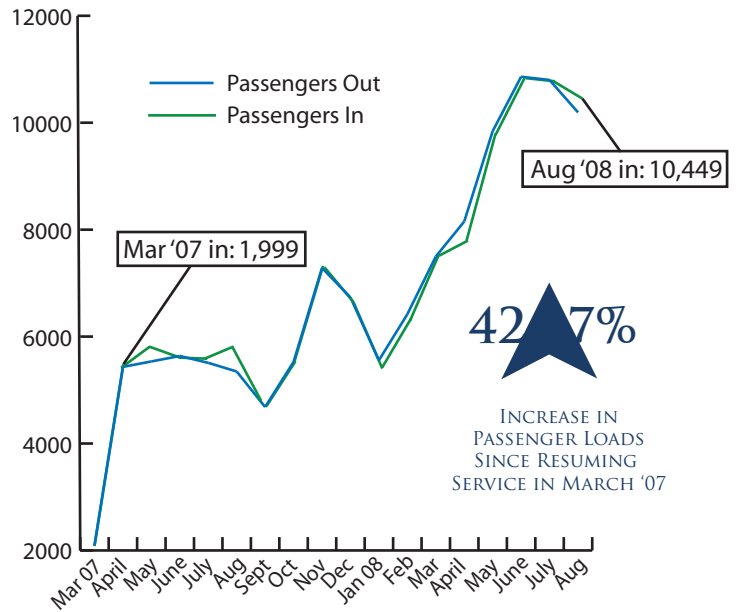
A safe, viable bicycle network increases quality of life, encourages use of public transportation and decreases driving and household costs. Its role in reducing greenhouse gas emissions helps meet AB-32 regulations and performance targets such as reducing vehicle miles traveled and congestion, as set by the Association of Bay Area Governments. Motor vehicles create roughly 75 percent of the smog in the Bay Area, and a bicycle network that works in tandem with public transportation can help ease commutes and pollution. Funding for public transportation is vital for maintenance and expansion. Airport connections facilitate economic ties for wider development.

COUNTY SALES TAX EXPENDITURES



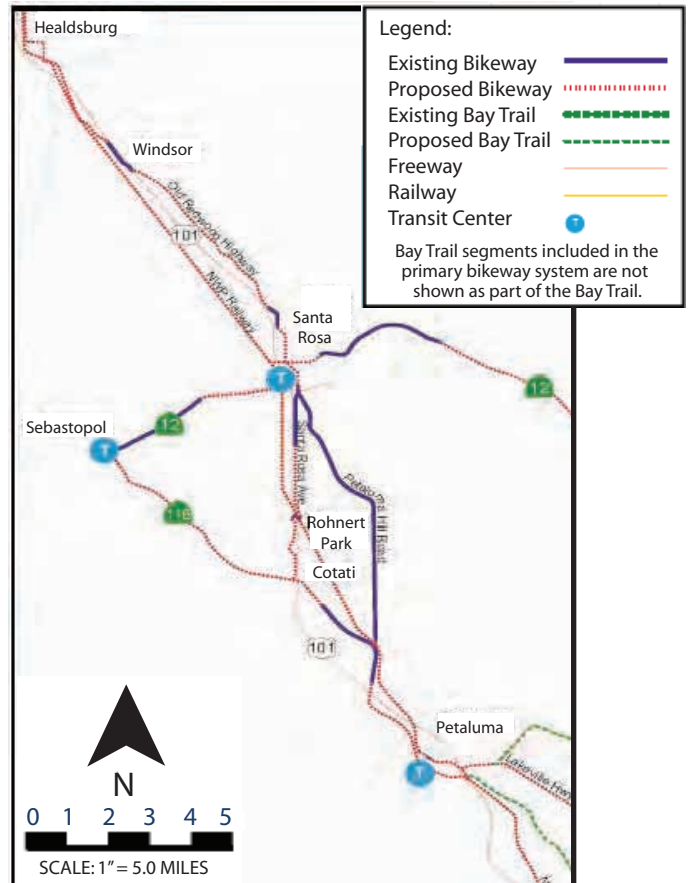
Note: Sonoma County Measure M 1/4 cent sales tax, 2005-2025.
Source: Metropolitan Transportation Commission (www.mtc.ca.gov)

STS (SONOMA COUNTY) AIRPORT PASSENGER LOADS, MARCH '07-AUG '08



Source: Sonoma County Airport (www.sonomacountyairport.org)

NORTH BAY PROPOSED REGIONAL BIKEWAY SYSTEM



Sources: Metropolitan Transportation Commission (www.mtc.ca.gov); Sonoma County Transportation Authority (www.sctainfo.org/Bike_Main_files/)

PUBLIC TRANSPORTATION

What is it?

Public transportation data from Sonoma County Transit is for buses only, and does not include demand response. Passenger miles traveled is the cumulative sum of the distances ridden by each passenger. Operating expenses per passenger mile quantify system cost effectiveness. Unlinked trips count passengers each time they board a vehicle, regardless of whether each route involves multiple vehicles. Occupancy rates are measured by passenger miles per vehicle mile. They show transit usage, reflect the transit system's ability to attract riders and indicate its environmental impact relative to alternatives.

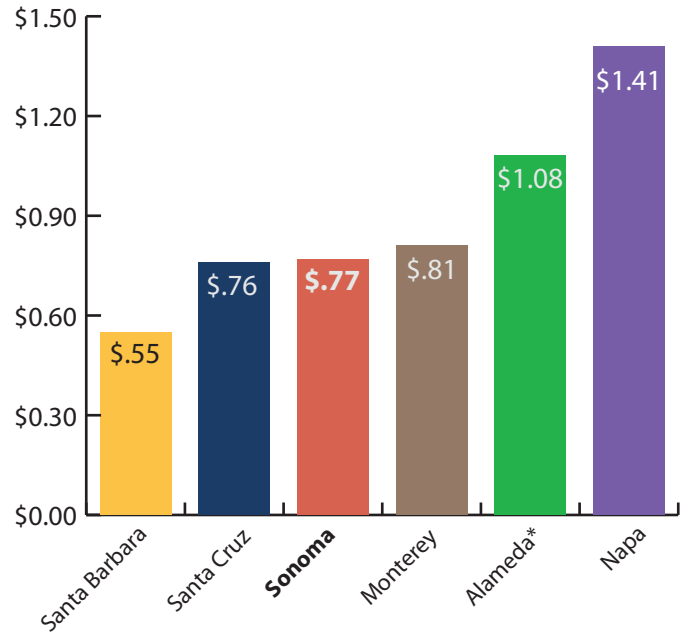
How is Sonoma County doing?

Sonoma County Transit's operating expense per passenger mile in 2007 fell in the middle of its comparison counties' data. **This statistic is similar to the 2007 national average of \$0.80**, which was the most recent data available at time of publication. Annual unlinked trips decreased in the early 2000s, but have steadily increased in the past two years. However, transit occupancy rates have trended downward in the past ten years, as passenger miles decreased and vehicle miles increased. The steep drop in the system's occupancy rate from 1998-1999 is a result of decreased passenger miles; however, unlinked trips increased, suggesting more riders took shorter trips. **Currently, unlinked trips and occupancy rates are increasing, indicating greater system utilization.**

Why is it important?

Public transit links the community with services, employment and resources. An efficient system reduces traffic congestion and pollution. A good public transit infrastructure is vital as the region's population increases.

OPERATING EXPENSE PER PASSENGER MILE, 2007



*Note: Alameda County is represented by the Livermore-Amador Valley Transit Authority.

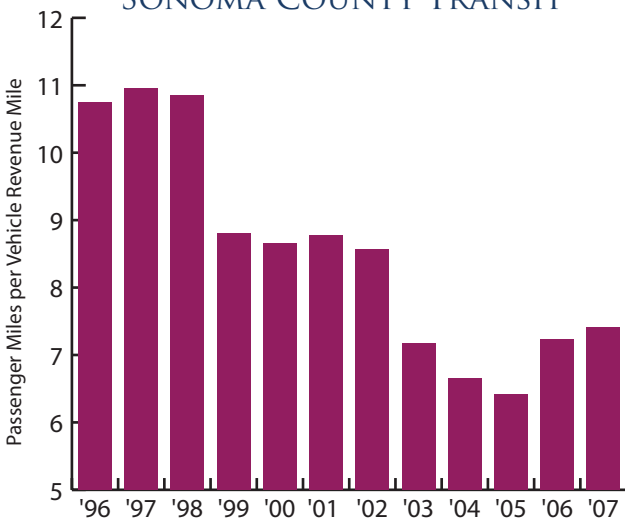
FOR MORE INFORMATION

American Public Transportation Association
www.publictransportation.org/contact/stories/calculator_08.asp

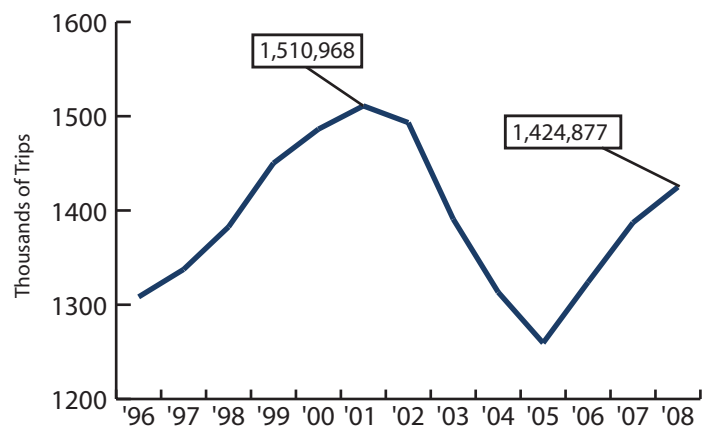
Sonoma County Transit
www.sctransit.com

Note: Public Transit definition provided by the American Public Transportation Association

OCCUPANCY RATE, SONOMA COUNTY TRANSIT



ANNUAL UNLINKED TRIPS, SONOMA COUNTY TRANSIT (THOUSANDS)



Note: Sonoma County Transit data for buses only; does not include demand response. All terms and definitions from the Federal Transit Administration. Source, all data: Federal Transit Administration (www.ntdprogram.com)

HIGHLIGHTS

In 2007-2008, Sonoma County's air quality was classified as "good" for 353 days, 11 more than in 2002.

Sonoma County disposed of 499,062 tons of waste in 2006, while diverting 64 percent of waste from landfills. An increase of 5% indicating Sonoma County is recycling more solid waste.

In this section are indicators such as air quality, water usage and solid waste diversion rates. These indicate strengths, challenges and opportunities in the local environmental quality.

Sonoma County residents used 2,577 kW of electricity per capita in 2007, the lowest level of residential electricity use recorded since 2003.

ENVIRONMENTAL QUALITY

What is it?

Environmental quality is a composite of air quality, electricity consumed per capita, natural gas used per capita and waste generated per capita. The scoring index comparing Sonoma County with comparison counties ranges from 0 (signifying that the county performed the worst among its peers) to 10 (the county performed the best).

How is Sonoma County doing?

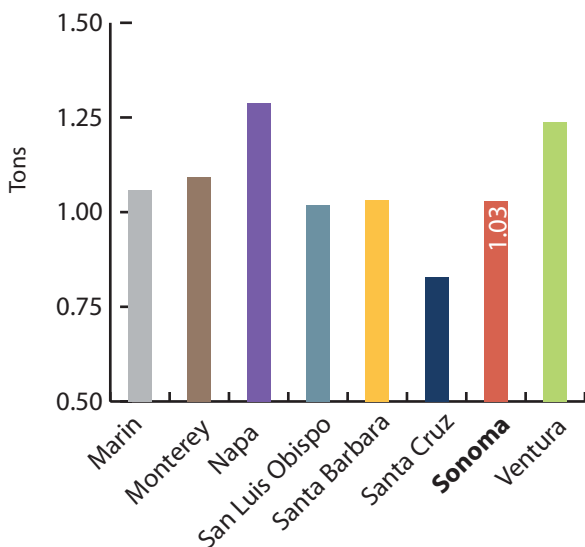
Sonoma County is at the higher end of environmental quality compared to its peers. **Air quality is particularly good in Sonoma County with 353 good air quality days per year**, giving it a rating of 8.9. Natural gas usage is also relatively good with 161 therms of natural gas being used per capita.

County residents generated 1.03 tons of waste per person in 2006, which is 5.5 percent less than in 2005. This figure is similar to that of Santa Barbara, but a fair distance from Napa's 1.29 tons. However, Sonoma County uses more electricity than most surrounding counties, with 2659 kW of electricity consumed per person.

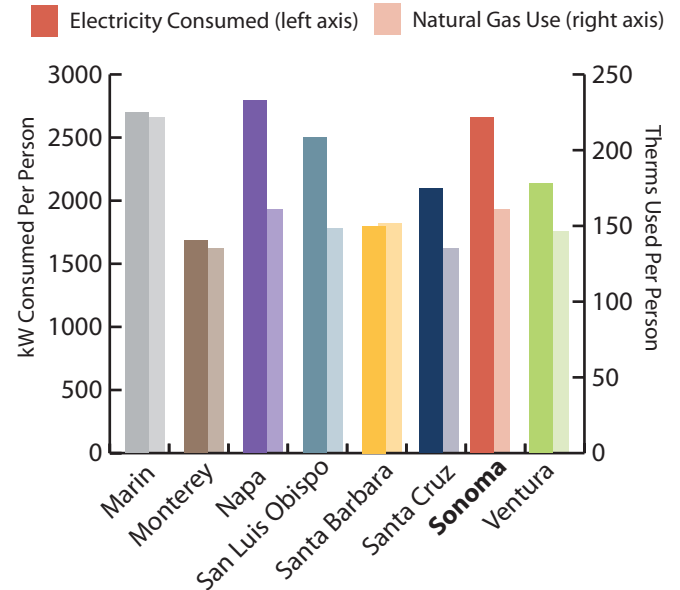
Why is it important?

Environmental quality largely affects the county's quality of life. Exposure to unhealthy air can aggravate hearing and respiratory illnesses and over time can increase the risk of many health conditions. Waste is a negative consequence of output and consumption; its generation leads to environmental degradation and resource depletion.

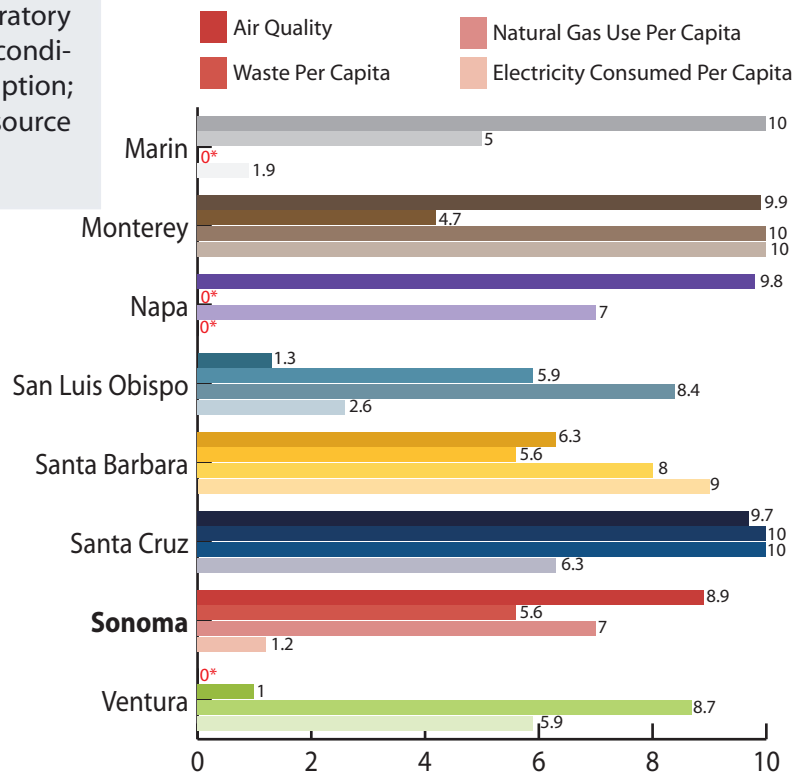
WASTE PER CAPITA, 2006



ELECTRICITY CONSUMPTION AND NATURAL GAS USE PER CAPITA, 2006



ENVIRONMENTAL QUALITY SCORES, 2006



*Note: Scores reflect a relative ranking between 0 and 10. A score of 0 simply signifies that a county performed the worst among its peers, while 10 means a county performed the best. The statistics on which the rankings are based are illustrated in the graphs on this page. For methodology and notes, see page 48.

Source, all data: California Integrated Waste Management Board (www.ciwmb.ca.gov)

AIR QUALITY

What is it?

This indicator measures the number of days per year when air quality was “good,” as designated by the U.S. Environmental Protection Agency’s Air Quality Index (AQI). The AQI ranges from 0 to 500; higher the AQI values indicate greater levels of air pollution and thus greater health concerns.

A “good” rating corresponds to an AQI between 0 and 50. Air quality is considered satisfactory, and air pollution poses little or no risk. A “moderate” rating corresponds to an AQI between 51 and 100. Air quality is acceptable, but with some pollutants there may be moderate health concern for a very small number of people. A rating of “unhealthy for sensitive groups” corresponds to an AQI between 101 and 150. Members of sensitive groups may experience health effects that do not occur in the general public, which is not likely to be affected when the AQI is in this range.

How is Sonoma County doing?

In Sonoma County in 2007, air quality was classified to be of “good” quality for 352 days. The remaining 13 days were classified as “moderate.” Sonoma County had no days where the air quality was “unhealthy for sensitive groups.” Sonoma County’s air quality is, on average, better than that in Napa, Santa Barbara, San Luis Obispo and Ventura.

Why is it important?

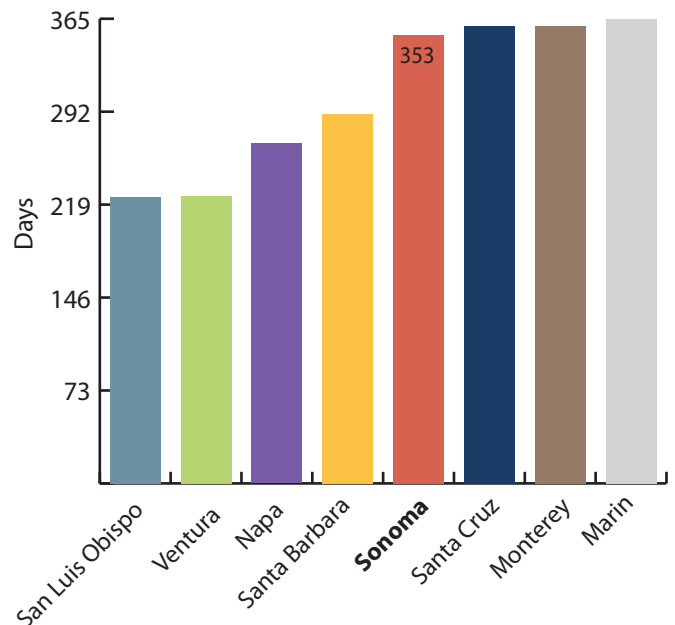
Poor air quality can aggravate the symptoms of heart and lung illnesses, especially in children and the elderly. Extended exposure increases risks for many health conditions, including lung cancer and cardiovascular disease.

AIR QUALITY LEVELS, SONOMA COUNTY, 2007 (BY NUMBER OF DAYS)	
Good	353
Moderate	12
Unhealthy for Sensitive Group	0
Unhealthy	0



INCREASE IN DAYS WHEN AIR QUALITY WAS “GOOD,”
2001-2007

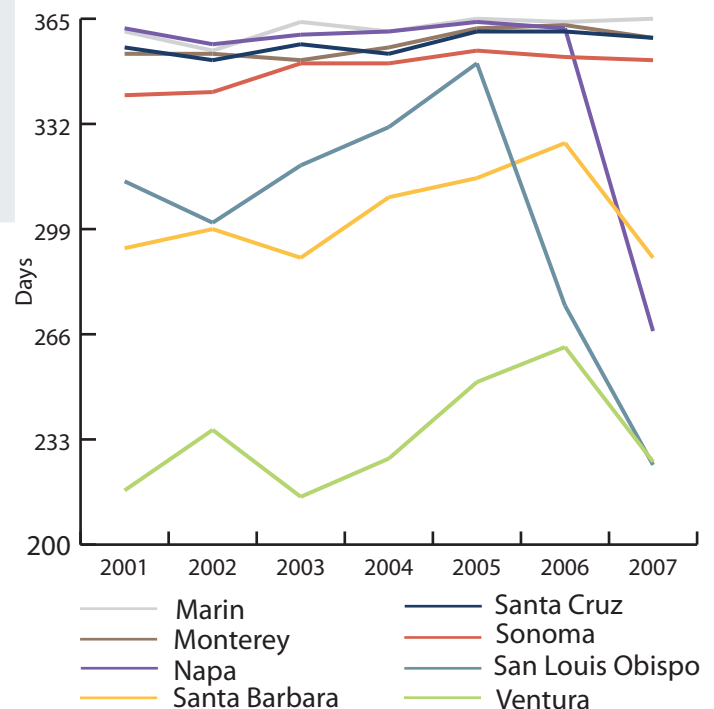
DAYS WHEN AIR QUALITY WAS “GOOD,” 2007



FOR MORE INFORMATION

Environmental Protection Agency
www.epa.gov

DAYS WHEN AIR QUALITY WAS “GOOD”



Source, all data: Environmental Protection Agency (www.epa.gov)

WATER CONSERVATION

What is it?

Water supply and use focus on the origin of the county's water and the amount being conserved or recycled. Conserved water is estimated by the Sonoma County Water Agency (SCWA) as part of their Best Management Practices initiative, which aims to increase water use efficiency for residents, landscape irrigation and business customers.

How is Sonoma County doing?

In 2006, Sonoma County consumed 90,449 acre-feet of water. **Over the last 10 years, usage has increased by less than 0.5 percent even as the county population continues to rise.** More than 34 percent of the county's water supply comes from sources other than the Russian River.

The SCWA is the only wholesale water agency in the state to have all of its retail water agencies as members in the California Urban Water Conservation Council, and committed to implementing best management practices for water conservation.

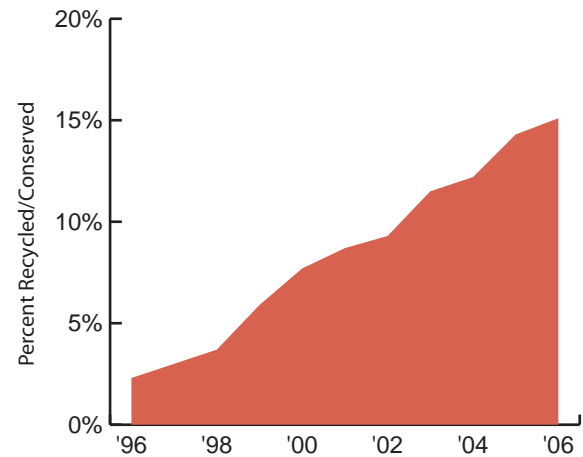
Efforts to conserve and recycle water have increased in recent years. From 1996 to 2006, water conservation and recycling increased from two to 15 percent. In 2006, 13,696 acre-feet of water were conserved or recycled. As one acre-foot of water equals 325,851 gallons, enough water to supply 3 single family homes for a year, **Sonoma County residents saved just under 4.5 billion gallons of water in 2006.**

In 2007, the State Water Resources Control Board issued an order mandating a 15 percent reduction of water diverted from the Russian River between July 1 and October 28 due to low water supply projections in Lake Mendocino. With the combined efforts of local water conservation programs and the Marin, Sonoma and Mendocino communities, Russian River diversions surpassed the state mandate achieving a reduction of 21.6 percent during the critical time period.

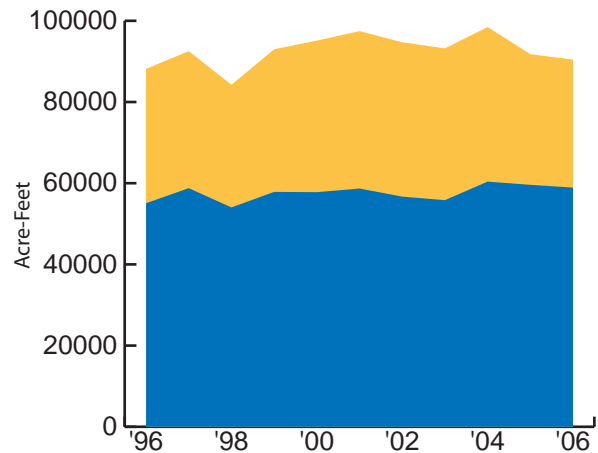
Why is it important?

Most of the county's water comes from the Russian River. Other potable water comes from wells and surface streams throughout Sonoma County. There currently exists sufficient water to supply retail water agencies. However, the Water Agency transmission mechanism is in need of upgrades to increase capacity. This need for capital improvements to infrastructure may lead to higher water prices and a still greater need for water conservation and recycling if not remedied.

WATER RECYCLING AND CONSERVATION, 1996-2006



WATER SUPPLY, 1996-2006



FOR MORE INFORMATION

Sonoma County Water Agency
www.sonomacountywater.org

Business Environmental Alliance
www.sonomabea.org

CONSERVATION AND RECYCLING 1996-2006, (ACRE-FEET)

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Urban Recycled	797	702	529	1,157	2,216	2,270	2,177	2,255	2,732	2,789	2,565
BMPs Conservation	1,287	2,053	2,547	4,353	5,092	6,232	6,640	8,500	9,286	10,331	11,131

Note: BMP= Best Management Practices

Source: all data: Sonoma County Water Agency (www.sonomacountywater.org)

ELECTRICITY AND NATURAL GAS

What is it?

Electricity is one of the most widely available forms of energy. It is used for lighting, heating/cooling and for practically anything which uses power. Natural gas is gaseous fossil fuel burned to create energy, most commonly used to heat homes.

How is Sonoma County doing?

Electricity consumption rose 12.0 percent between 1997 and 2007. Both residential and non-residential consumption dropped in 2001 during the energy crisis, but have since risen to meet pre-crisis levels. Residential natural gas consumption reached a high of 93 million British Thermal Units (BTUs) in 1999. Since then, it has dropped to 76.5 million BTUs in 2007. Non-residential natural gas consumption dropped to the lowest level since 1998, to 38.3 million BTUs.

Residential per-capita electricity consumption was 2,577 Kilowatts in the year 2007, 4.0 percent less than the 2006 per capita consumption of 2,639 Kilowatts. **Per capita natural gas consumption has declined 5.2 percent from 1997 to 2007; current use is 158 therms a year.**

Why is it important?

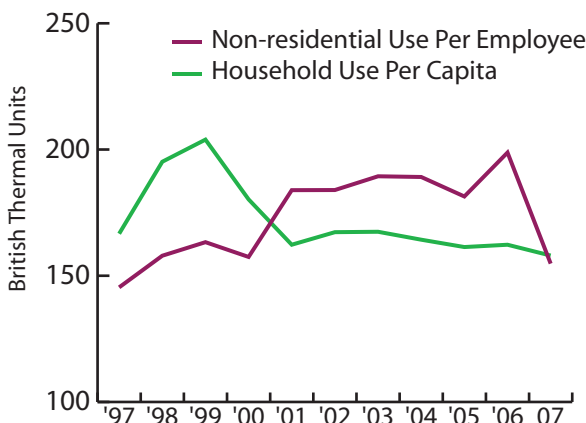
Burning fossil fuel creates more than half of the electricity consumed in California, yet decreases the quality of air. Increased efforts to use energy more efficiently can lead to better air quality, conservation of natural resources, increased economic competitiveness and lower costs. Energy prices have risen dramatically in recent years, spurring more individuals and companies to look for innovative ways to use energy more efficiently.

FOR MORE INFORMATION

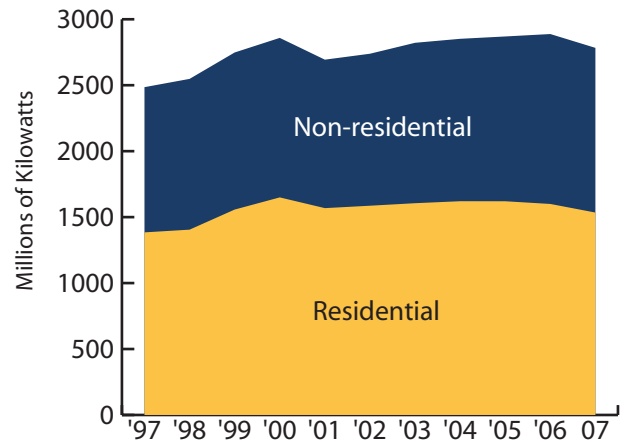
California Energy Commission
www.energy.ca.gov

Pacific Gas & Electric
www.pge.com

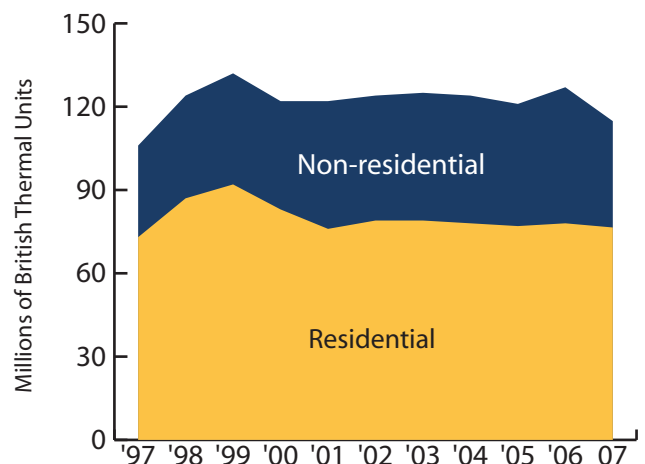
NATURAL GAS USE, 1997-2007



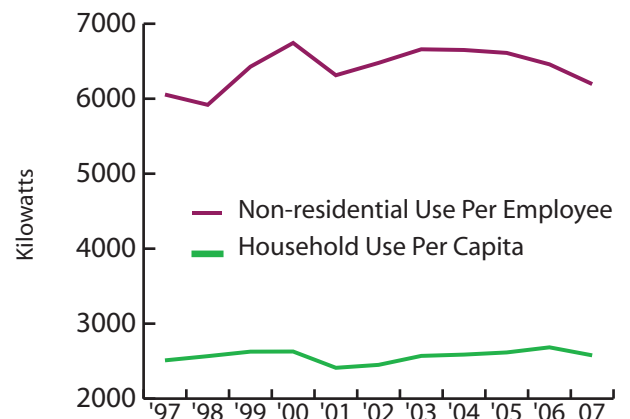
ELECTRICITY CONSUMPTION, 1997-2007



NATURAL GAS CONSUMPTION, 1997-2007



ELECTRICITY USE, 1997-2007



Source, all data: California Energy Commission (www.energy.ca.gov)

WASTE AND HOUSEHOLD TOXICS

What is it?

Solid waste is any garbage or refuse resulting from industrial, commercial, mining, or agricultural operations, and from community activities. Leftover household products that contain corrosive, toxic, ignitable or reactive ingredients are considered to be "household hazardous waste" or "HHW."¹

How is Sonoma County doing?

Sonoma County's waste production in 2006 decreased 7 percent over the previous year, to 499,062 tons.

California state law requires that counties divert at least 50 percent of their waste from being buried in a landfill. Typically, waste is diverted by being reused, recycled or composted. **Sonoma County's waste diversion rate for 2006 was 64 percent.**

Immediately following the changeover to the blue "Single-Stream" recycling bin, curbside residential recycling increased by about 11 percent. **Commercial and residential single-stream recycling diverted 95,272 tons from the landfill in 2006.**

In 2003, leaks were detected in Sonoma County's Central Landfill, and the contaminated water was collected and treated. The liner has since been repaired, and the facility now functions as a transfer station rather than a waste depository. The waste that is not diverted must now be hauled out of the county to four private landfills - costing the County about \$14 million per year. However, the Central Landfill, through the release of methane gas, generates more than 55,000 megawatt-hours of electricity per year.

The County, in partnership with the Sonoma County Waste Management Agency, started the Household Toxics Program in 1993. In January 2006, the Waste Management Agency expanded its toxics collection program by opening the Household Toxics Facility at the Central Disposal Site in Petaluma. **Participation in the Household Hazardous Waste Program has increased 14 percent since 2005.**

Why is it important?

Reducing the amount of waste produced in Sonoma County will conserve valuable resources, reduce greenhouse gas emissions and help protect public health and the environment.

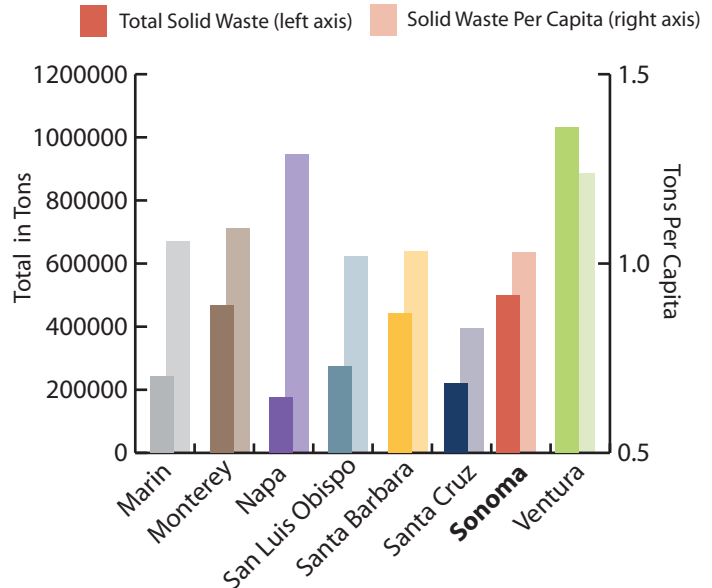
¹ Environmental Protection Agency. (www.epa.gov/epawaste/index.htm)

FOR MORE INFORMATION

Sonoma County Waste Management Agency
www.recyclenow.org

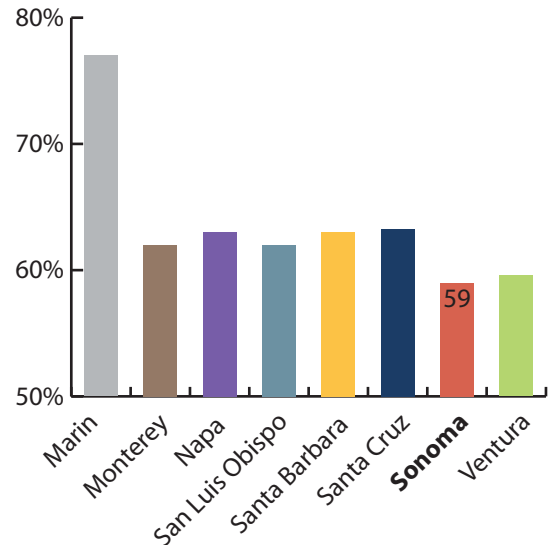
California Integrated Waste Management Board
www.ciwmb.ca.gov

SOLID WASTE GENERATED, 2006



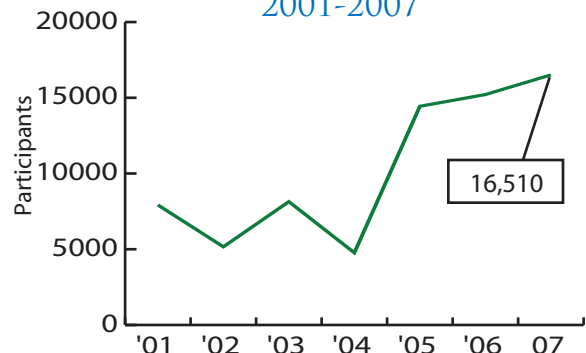
Source: California Integrated Waste Management Board (www.ciwmb.ca.gov)

COMPARABLE WASTE DIVERSION, 2005



Source: California Integrated Waste Management Board (www.ciwmb.ca.gov)

NUMBER OF TOXICS PROGRAM PARTICIPANTS, SONOMA COUNTY, 2001-2007



Source: Sonoma County Waste Management Agency (www.recyclenow.org)

AGRICULTURE AND OPEN SPACE

What is it?

Agricultural lands are used to grow food and raise livestock. Open Space areas are lands set aside for public use and enjoyment.

How is Sonoma County doing?

Since it was created in 1990, the Sonoma County Agricultural Preservation and Open Space District has protected more than 75,000 acres. Voters approved a quarter-cent sales tax to fund the District, and a vote in 2006 extended this tax through 2031.

The District has acquired and owns 16,937 acres throughout the county to create and expand parks and preserves, areas for community recreation, and to provide public trails.

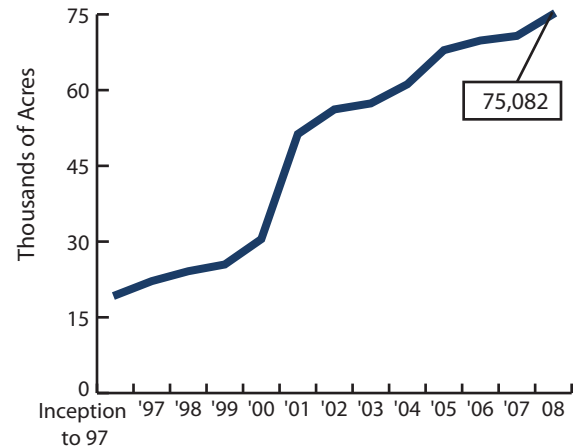
In addition to the District and the Sonoma County Regional Parks Department, many of Sonoma County's recreational opportunities lie within the county's state parks. **Sonoma County is home to 11 California state parks, totalling 31,874 acres.**

Sonoma County and San Luis Obispo County tie for the highest percentage of acres in agriculture among comparison counties. In both counties, agricultural land accounts for 62 percent of their total land area.

Why is it important?

Sonoma County's vineyards and farmlands that generate fresh produce and wine are a central attraction of the tourism industry. In 2004, agriculture production generated more than half a billion dollars and tourism generated more than a billion dollars in destination spending - an important part of the county's economy.

OPEN SPACE PROTECTED ACREAGE



Source: Sonoma County Agricultural Preservation and Open Space District (www.sonomaopenspace.org)



INCREASE IN PROTECTED ACREAGE, 1998-2008

FOR MORE INFORMATION

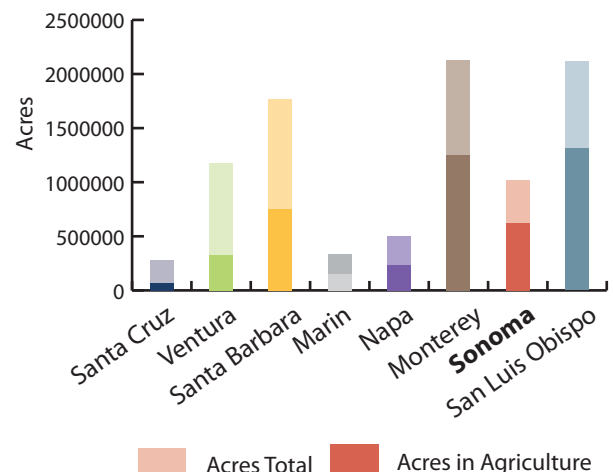
Sonoma County Agricultural Preservation and Open Space District
www.sonomaopenspace.org

STATE PARKS IN SONOMA COUNTY

Area	Acres
Salt Point SP	5,685
Sonoma Coast SP	5,685
Austin Creek SRA	5,683
Annadel SP	5,000
Sugarloaf Ridge SP	3,783
Fort Ross SHP	3,200
Jack London SHP	1,611
Armstrong Redwoods SR	805
Kruse Rhododendron SR	317
Sonoma SHP	64
Petaluma Adobe SHP	41

Source: California State Parks (www.parks.ca.gov)

AGRICULTURAL AND TOTAL LAND



Source: US Department of Agriculture (www.nass.usda.gov)

HIGHLIGHTS

Most troubling of all, you may be passing your health habits to your children, which explains why experts fear this may be the first generation of American kids ever to have a shorter life span than their parents.*

These startling statistics form an important part of the picture of the health in Sonoma County. The following section highlights leading causes of death, chronic disease and important behavioral and social factors influencing health in Sonoma County and points the way for improving the health of our community.

What is the measure of a county's health? How do you take the temperature of a county of over 1,500 square miles with multiple ethnic groups, ages, cultures and communities? One way is by taking a look at yourself.

If you are like 57% of adults in Sonoma County you're currently overweight or obese. If you're like 24% your blood pressure is too high or like another 14% of adults still smoking in spite of known health risks. If you're like 44% of adults, you join the ranks of thousands who eat too few fruit and vegetables each day. And what you do eat, you don't burn off assuming you are like the 62% of us that get no moderate or vigorous physical activity.

*Excerpt modified from A. Parks, "American's Health Check-up", Time Magazine, November 20, 2008.

CAUSES OF DEATH

What is it?

Leading causes of death are the most common causes of mortality ranked by frequency of occurrence. A death rate is a ratio of deaths per unit of population, in most cases 100,000. Age-adjusted rates control for age effects, allowing for better comparison of rates across areas. Rates are commonly compared to Healthy People 2010, a set of national health objectives established to serve as a basis for the development of community plans.

How is Sonoma County doing?

From 2004-2006, five chronic diseases--cancer, heart disease, stroke, chronic lower respiratory disease and diabetes--accounted for roughly 50 percent of all deaths in Sonoma County. **Compared to California, Sonoma County's mortality rates from chronic disease were lower due to heart disease but higher due to cancer and stroke.** Sonoma County failed to meet the Healthy People 2010 goals for cancer and stroke.

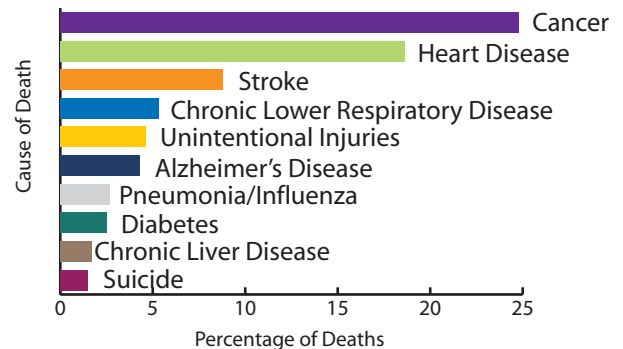
More Sonoma County residents ages 15-44 years died as a result of unintentional injury from 2004 to 2006 than any other cause. More than 80 percent of all unintentional injury deaths in Sonoma County were due to motor vehicle collisions, poisoning and falls. **For every death due to unintentional injury, there were approximately 20 non-fatal hospitalizations during the same time period.**¹ Since 1999, rates of non-fatal hospitalizations for unintentional injuries have increased. Falls account for over half of all non-fatal, unintentional injury hospitalizations in Sonoma County, with nearly 70 percent of hospitalizations for falls involving adults aged 65 and over.

Why is it important?

Leading causes of death data is useful to determine the overall health of a population and helps to examine the relative burden of mortality from specific causes.

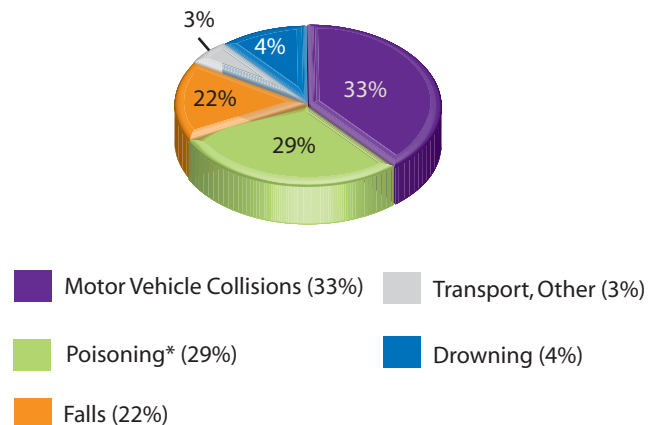
¹ California Department of Statewide Health Planning and Development Patient Discharge Data, 2002-2004

LEADING CAUSES OF DEATH, SONOMA COUNTY, 2004-2006



Source: California Department of Public Health, County Health Status Profiles, 2008

UNINTENTIONAL INJURY DEATHS BY CAUSE, 2004-2006



*Note: Unintentional poisoning deaths are largely caused by inadvertent overdose of medication and/or narcotics.
Source: California Department of Statewide Health Planning and Development Patient Discharge Data, 2002-2004

LEADING CAUSE OF DEATH BY AGE GROUP, SONOMA COUNTY, 2004-2006

Age	Cause 1	Cause 2	Cause 3
<1	Perinatal Conditions	Congenital Malformations	Sudden Infant Death Syndrome
1-14	Congenital Malformations	Unintentional Injuries	Disease of Respiratory System
15-29	Unintentional Injuries	Cancer	Suicide
30-44	Unintentional Injuries	Cancer	Drug-Related Deaths
45-64	Cancer	Heart Disease	Unintentional Injuries
65-84	Cancer	Heart Disease	Stroke
85+	Heart Disease	Stroke	Cancer

Source: California Department of Public Health, Vital Statistics, Death Records 2004-2006

AGE-ADJUSTED DEATH RATES* WITH HEALTHY PEOPLE 2010 COMPARISON, 2004-2006

	Sonoma	California	HP 2010
All Cancers	179.2	161.3	158.6
Heart Disease	128.5	154	162
Stroke	60.6	47.8	50
Lung Cancer	45.9	40.2	43.3
Unintentional Injuries	33.8	30.2	17.1
Breast Cancer	21.4	22.1	21.3
Diabetes	18.4	22.1	NA
Motor Vehicle Collisions	11.7	11.9	8
Suicide	10.8	9	4.8
Drug-induced	11.2	10.3	1.2
Firearm Injury	6.1	9.2	3.6
Homicide**	2.2	6.8	2.8

*Note: rates per 100,000 population
**Data unreliable due to small numbers

GENERAL HEALTH

What is it?

The World Health Organization defines health as a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity. Birth rates are the number of births per 1,000 people. Teen birth rates focus on the number of births to females aged 15-19. Infant mortality rates capture the number of infant deaths per 1,000 births.

How is Sonoma County doing?

From 2003 to 2006, Sonoma County birth rates fell in every race/ethnic group.

From 2004-2006, the teen birth rate in Sonoma County was considerably lower than the California rate. However, birth rates for Hispanics and American Indian/Alaska Natives during this time were markedly higher than those of the state.

Sonoma County infant mortality rates improved more rapidly than the California rates between 2001-2006. **Sonoma County has met the Healthy People 2010 goal for lowering infant death rates.**

Why is it important?

Tracking trends in fertility and birth rates helps support effective social planning and adequate age-appropriate resources to accommodate changes in population composition. Sustained high birth rates create large populations of young dependents, increasing demand for affordable child care, an adequate number of schools and other supports for young children.¹

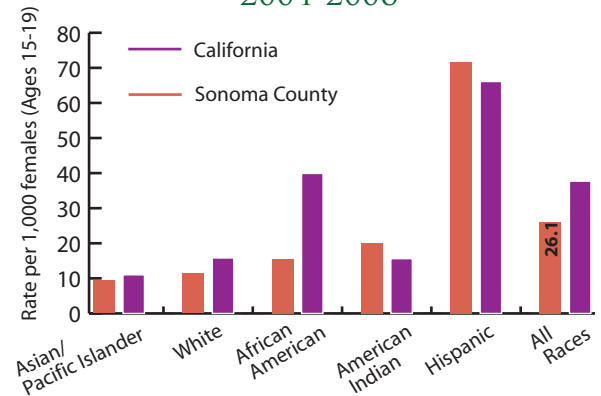
Teen mothers typically have greater difficulty completing their education, have fewer educational opportunities and are more likely to require public assistance and to live in poverty than their peers. They are also at high risk for poor birth outcomes and for having another pregnancy while still in their teens.

Infant mortality is an important indicator of the health status of the community as it reflects the health status and availability of perinatal care of mothers.

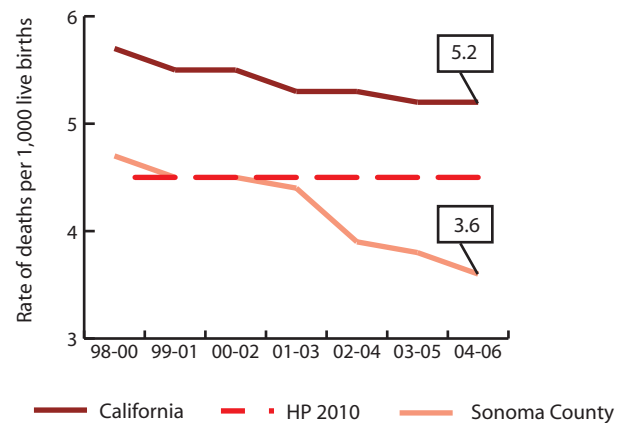
¹Ref: Coale, Ansley J. 1987. "How a Population Ages or Grows Younger." pp. 365-369 in S.W. Menard and E.W. Moen (eds.), Perspectives on Population: An Introduction to Concepts and Issues. Oxford: Oxford University

LEADING CAUSES OF NON-FATAL UNINTENTIONAL INJURY HOSPITALIZATION, 2003-2005		
	Number	Percent
Falls	5,129	52.6%
Motor Vehicle Collisions	1,368	14.0%
Poisoning	644	6.6%
Overexertion	294	3.0%
Struck by Object	257	2.6%
Other Transportation	247	2.5%
Natural/Environmental	238	2.4%
Cut/Pierce	209	2.1%
Bicyclist, Other	182	1.9%
Burn	119	1.2%

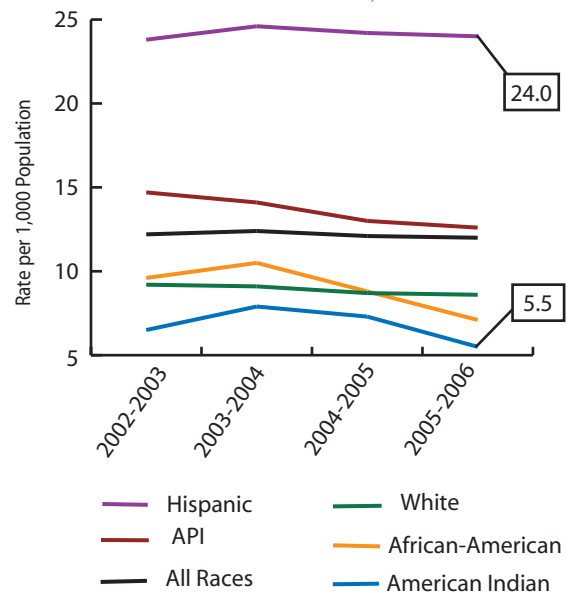
TEEN BIRTH RATES BY RACE/ETHNICITY, 2004-2006



INFANT MORTALITY RATES, 3-YEAR MOVING AVERAGE, 1998-2006



BIRTH RATES BY RACE/ETHNICITY, 2-YEAR AVERAGE, 2002-2006



Source: California Department of Public Health, Vital Statistics, Birth Records 2002-2006

HEALTH CARE ACCESS

What is it?

The percentage of people with health coverage represents the number of people with health insurance out of the entire population. Health insurance coverage by income reports the percentage of people insured at different annual household income levels. The number of physicians is an indicator of the availability of medical care to Sonoma County residents.

How is Sonoma County doing?

While Sonoma County has a significantly lower rate of uninsured individuals than California, **more than one-third of households with an income between \$15,000 to \$20,000 per year reported no insurance coverage.**

The supply of physicians in Sonoma County increased by approximately 37 percent from 1990 to 2004, which is higher than the increase in California overall (22 percent). However, a recent survey of local physicians, published by the Sonoma County Medical Association, found that **48 percent of respondents are considering either moving away from the county or retiring from medical practice within five years.**²

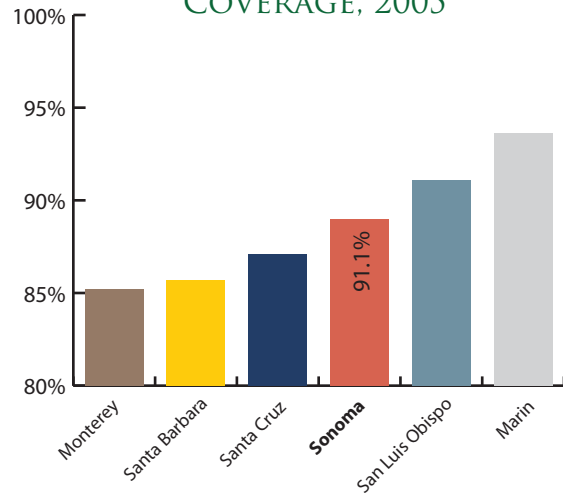
Why is it important?

The uninsured are those who do not have health insurance coverage through private or public health insurance plans. Health insurance coverage is an important measure of access to health care. Uninsured individuals are less likely to receive appropriate services such as preventive care.

The supply of primary and specialty physicians directly affects patient access to care, satisfaction, and scheduling, as well as physician compensation and the overall cost and quality of medical care.

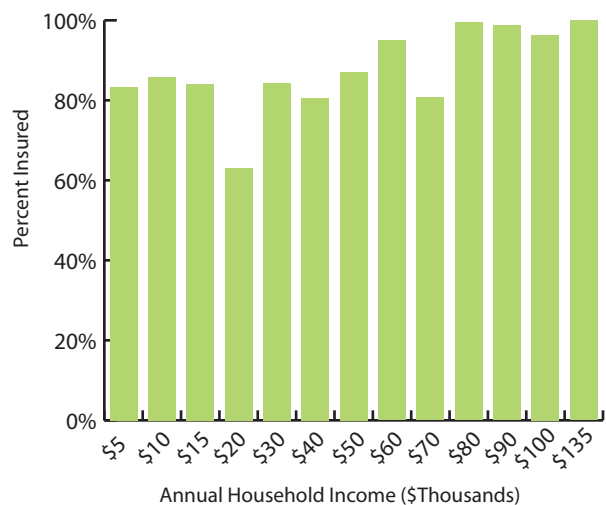
²Ref: C. Melody, *Sonoma Physician*, Vol. 57, No. 2, Spring, 2006.

PEOPLE WITH HEALTH COVERAGE, 2005



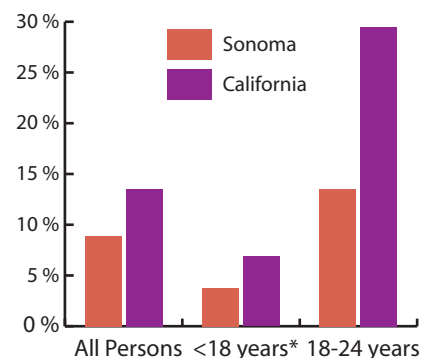
Source: Bureau of Labor Statistics (www.bls.gov)

HEALTH INSURANCE COVERAGE BY INCOME, SONOMA COUNTY, 2005



Source: California Health Interview Survey (www.chis.ucla.edu)

INDIVIDUALS WITHOUT HEALTH INSURANCE, 2005



* Rate is unstable due to small population size

Source: California Health Interview Survey (www.chis.ucla.edu)

NUMBER OF PHYSICIANS BY FISCAL YEAR, 1991-2006

Fiscal Year	Physicians in Sonoma	Physicians in CA	People:Physician Ratio, Sonoma	People:Physician Ratio, CA
1991	1,021	76,043	386.0	396.4
1992	1,061	76,367	379.7	402.3
1993	1,078	76,411	381.1	407.7
1994	1,102	77,311	378.2	406.4
1995	1,103	78,159	382.3	404.5
1996	1,136	79,048	375.9	402.8
1997	1,145	80,341	379.2	400.9
1998	1,164	81,762	379.7	399.4
1999	1,206	82,872	372.7	399.9
2000	1,264	84,675	361.8	398.6
2001	1,286	86,934	361.0	395.5
2002	1,322	89,025	354.5	393.1
2003	1,336	91,049	351.4	391.1
2004	1,362	92,852	348.7	390.6

Source: Medical Board of California, 2007

GENERAL HEALTH

What is it?

The World Health Organization defines health as a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity. Smoking status measures the smoking history of people as a percentage of the total population. Adults by weight classification is a measure of the percentage of people with different body mass indexes. Further, the percent of adults reporting being overweight or obese and their associated risk behaviors aims to portray behaviors attributed to obesity.

How is Sonoma County doing?

In 2005, more than half of Sonoma County residents reported being overweight or obese. A diet rich in fruits and vegetables and regular exercise are two important contributors to maintaining a healthy weight.

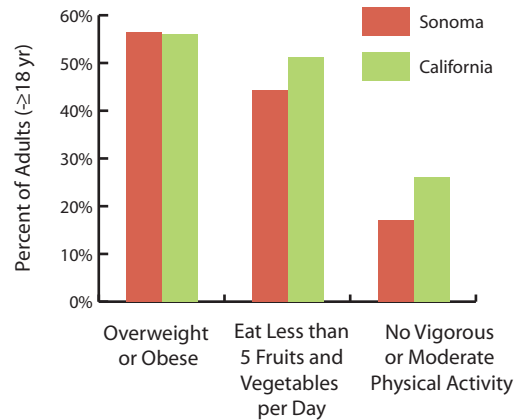
More than 44 percent of Sonoma County residents reported eating less than the recommended five fruits and vegetables per day, and about 17 percent of adults did not participate in any vigorous or moderate physical activity. However, participation in physical activity has increased since 2003, and fewer people are inactive in Sonoma County than the California average.

While only 14.4 percent of Sonoma County residents reported being current smokers in 2005, more than a quarter of the population reported being a former smoker. A slightly higher percentage of residents in Sonoma County are former smokers compared to California as a whole.

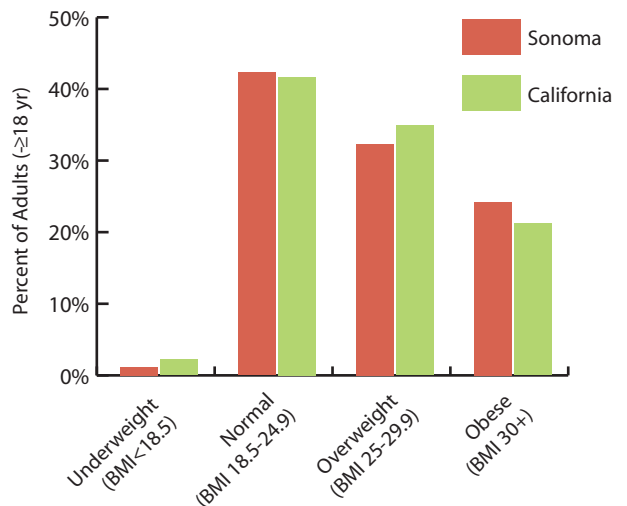
Why is it important?

Chronic diseases are a leading cause of death and disability in the population. To a large degree, the major chronic diseases result from lifestyle choices and habits of daily living, which can be modified for improved health. Health-damaging behaviors include poor eating habits, lack of physical activity, and tobacco use.

REPORTED OVERWEIGHT OR OBESITY AND ASSOCIATED RISK BEHAVIORS, 2005

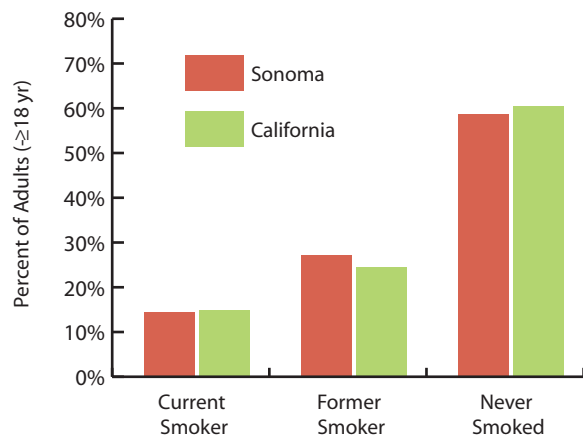


ADULTS BY WEIGHT CLASSIFICATION, 2005



Note: BMI=Body Mass Index
Source, all data: California Health Interview Survey

SMOKING STATUS, 2005



FOR MORE INFORMATION

Sonoma County Health Department
www.sonoma-county.org/health

American Diabetes Association
www.diabetes.org/home.jsp

Healthy People 2010
www.healthypeople.gov

SUBSTANCE ABUSE

What is it?

Substance abuse is overuse of alcohol and/or drugs which detracts a person's health and well-being. Youth alcohol reported use for California and Sonoma County along with the percentage of students reporting alcohol-related driving is derived from surveying youth in grades 7, 9 and 11 over a two year period. Alcohol-related death and injury rates per 100,000 licensed drivers as a result of motor vehicle collisions is based on California Highway Patrol traffic records over 2004-2006.

How is Sonoma County doing?

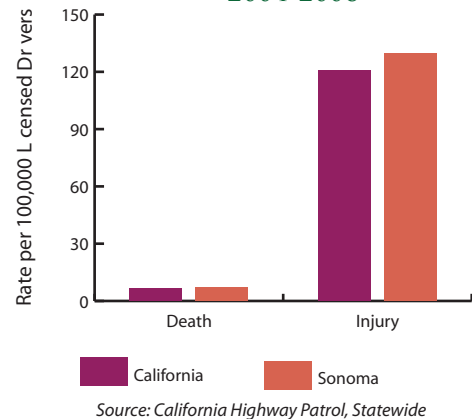
Among students, reported alcohol usage increased with educational grade level. Students in 11th grade report significantly higher alcohol use than students in 7th and 9th grades.

In 2005, 49.5 percent of Sonoma County teens between the ages of 12 and 17 years reported having used alcohol at least once. For three alcohol questions asked, Sonoma County 9th and 11th grade students reported significantly higher alcohol use rates than California 9th and 11th grade students. In 2004-2006, death and injury rates due to alcohol-related motor vehicle collisions were similar for Sonoma County and California. **In 2002-2004, almost 36 percent of deaths to Sonoma County residents ages 15-24 were due to motor vehicle collisions.**

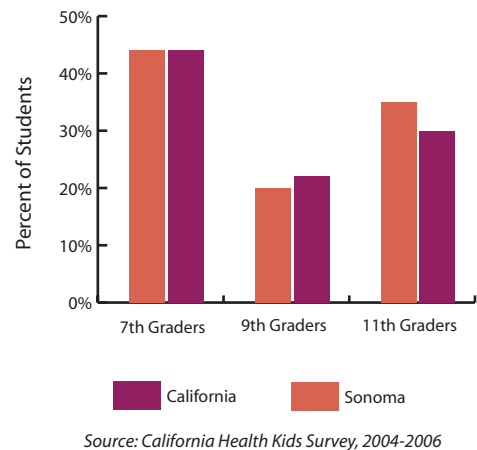
Why is it important?

Alcohol or other drug abuse is associated with developing chronic diseases, such as chronic liver disease; with transmission of communicable diseases, such as hepatitis B and C and HIV; violence; unsafe health behaviors, such as high-risk sexual practices; injury, such as traffic injuries and fatalities; perinatal health problems, such as fetal alcohol syndrome and low birth weight; mental illness, such as substance-induced mood disorder; and poor oral health.

ALCOHOL-RELATED DEATH AND INJURY RATES FROM MOTOR VEHICLE COLLISIONS, 2004-2006

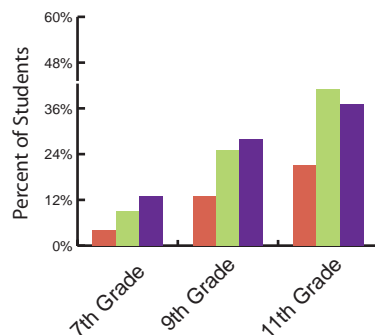


STUDENTS WHO REPORT DRINKING AND DRIVING OR BEING A PASSENGER IN A CAR DRIVEN BY SOMEONE WHO HAS BEEN DRINKING, 2004-2006



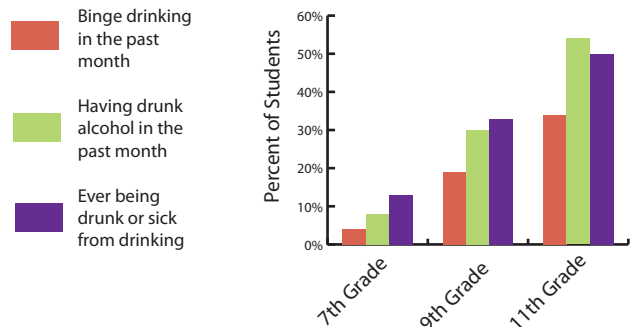
YOUTH ALCOHOL REPORTED USE, 2004-2006

CALIFORNIA



Source: California Health Kids Survey, 2004-2006

SONOMA COUNTY



Source: California Health Kids Survey, 2004-2006

FOR MORE INFORMATION

Sonoma County Health Department
www.sonoma-county.org/health

California Department of Health Services
www.dhs.ca.gov

SOCIAL DETERMINANTS OF HEALTH VS SOCIAL FACTORS

What is it?

Social factors are influences such as education, income and quality of neighborhood environment that affect one's health and the likelihood of becoming sick and dying prematurely. A person's health is not only a product of good medical care and genes. New information shows that an individual's health varies greatly with income and education. These and other ethnic and environmental factors influence behaviors such as smoking, diet, exercise, alcohol and drug use and have powerful effects on health and contribute to gaps in health among different social groups. Differences in health along social, economic and racial or ethnic lines are known as "health disparities" or "social disparities in health."

How is Sonoma County doing?

Data from Sonoma County is consistent with national trends. **Sonoma County residents who have not graduated from high school are nearly two times more likely to be diagnosed with heart disease.**

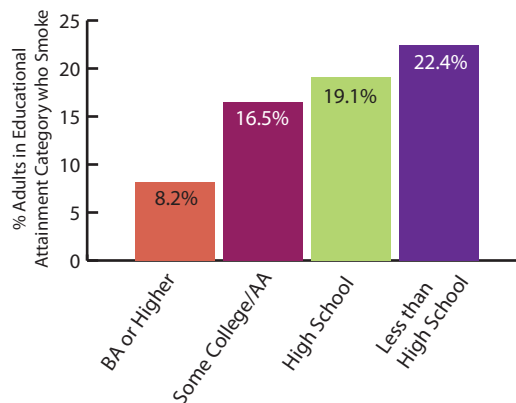
Why is it important?

Health differences across income and education are seen in a range of health conditions from the beginning of life to old age. These differences apply not only to the lower income people or less educated, but cross all socioeconomic groups to varying degrees. While people in the most disadvantaged groups typically experience the poorest health, even middle-class Americans are less healthy than those with greater advantages.

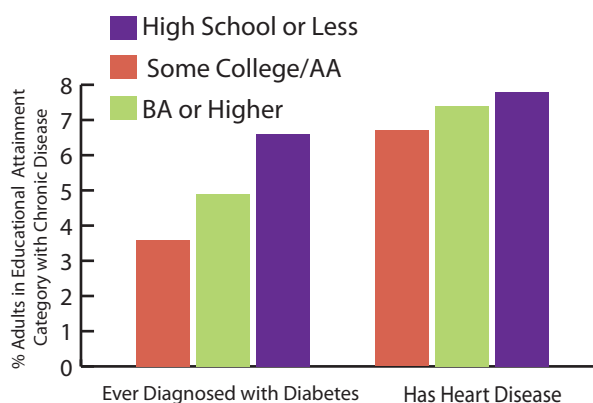
Social differences in health status can be reduced, but only if solutions can be identified to address their root causes or underlying determinants of health. Policies that promote education, enhance workforce opportunities and improve neighborhood environments are all examples of policies that also improve the health of our community.

Sonoma County residents who have not completed high school are two and a half times more likely to be current smokers than college graduates.

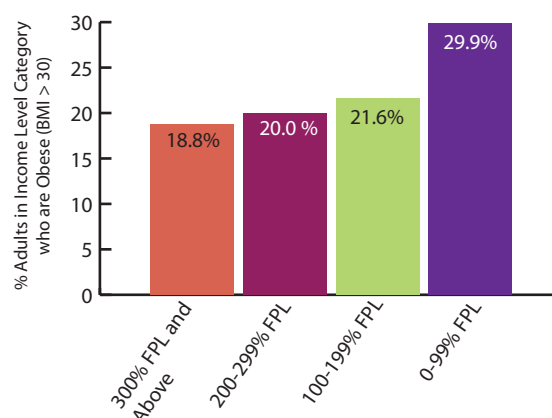
ADULT SMOKERS BY EDUCATIONAL ATTAINMENT



ADULTS WITH CHRONIC DISEASE BY EDUCATIONAL ATTAINMENT



OBESE ADULTS BY INCOME LEVEL



Note: FPL stands for Federal Poverty Level
Source all data: California Health Interview Survey, 2003, 2005 for Sonoma County

HIGHLIGHTS

54 percent of county schools are rated above average in statewide rankings, highlighting the quality of education that Sonoma County provides its students; however, 27 percent ranked below average, indicating a need for continued support and advancement for the local student population.

22 percent more of the population can afford a median priced home in Sonoma County in 2008 than 2007, a result of the drop in housing prices and a local economy that did not suffer tremendous unemployment during the national economic downturn.

Society indicators include education levels, voter turnout and crime rates. These indicators allow for comparisons among Sonoma, comparable counties, California and the nation to gauge relative performance in quality of education, safety, and public engagement.

1,418 residents registered to vote between May and September 2008, continuing a history of high civic participation and reflecting a desire by residents to voice their opinions during a Presidential election year.

EDUCATION

What is it?

Education in Sonoma County consists of 40 school districts and 179 public schools, serving nearly 71,000 students in kindergarten through twelfth grade. (An additional 6,300 students are enrolled in local private schools.) Indicators that help measure the quality of education offered to public school students include school rankings, student-to-teacher ratios, and average class size. A student-to-teacher ratio is an average estimate of the number of students per instructor within the school system. This indicator shows roughly the number students for whom a teacher may be responsible. A lower ratio is advantageous, as this means a teacher can devote more time per student.

How is Sonoma County doing?

Sonoma County ranks favorably with 54% of public schools above average in statewide rankings. The County also has a lower student:teacher ratio of 19.3:1 than the California average of 20.8:1. **The average class size for the 2007-2008 academic year in Sonoma County was 23.5 students while the state's average was 25.2 students.**

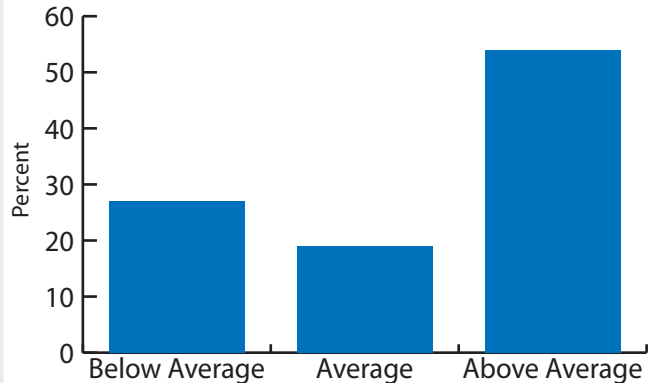
Smaller classes allow for more individualized attention and resources per student, increasing student success at the elementary and secondary levels. Early student success raises post-secondary educational attainment and keeps the local workforce competitive.

Why is it important?

A balanced education system is an attraction for relocation because it opens up career opportunities for residents and increases the quality and diversity of the labor pool, an important asset for businesses looking to expand locally.

Public education creates a majority of the workforce, thus education quality is an important aspect of future economic vitality. Quality of education also impacts other societal factors such as juvenile crime. Quality within the education system also a factor in attracting and retaining residents. Excellence in education is crucial to a successful economy in Sonoma County, now and in the future.

STATEWIDE RANKING OF SONOMA COUNTY K-12 SCHOOLS, 2007-2008



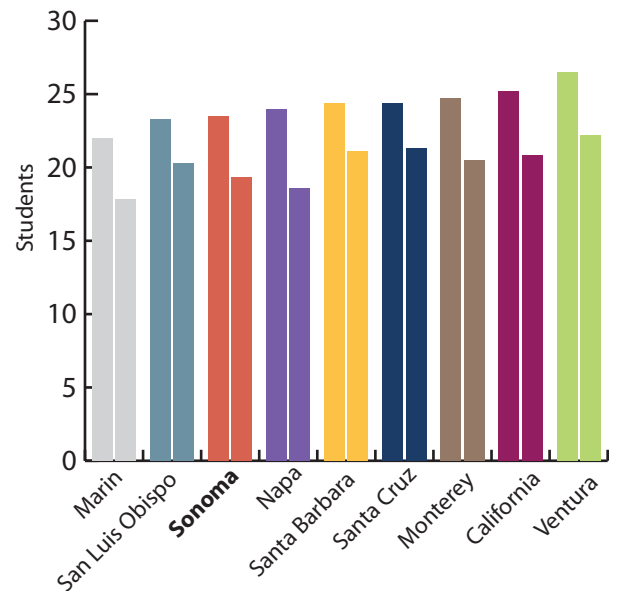
DESIGNATION BY DECILE RANGE

Above Average	10-7
Average	6-5
Below Average	4-1

Note on rankings: the State of California annually ranks its public schools by dividing them into ten deciles. This division is a relative comparison of schools' Academic Performance Indices (API), which are based on 2007 Standardized Testing And Reporting (STAR) test results. For high schools, the API includes California High School Exit Examination (CAHSEE) results.

Source: Sonoma County Office of Education (www.scoe.org)

CLASS SIZE AND STUDENT:TEACHER RATIO, 2007-2008



Legend: Average Class Size (Blue bar), Student:Teacher Ratio (Red bar)

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

2.2 STUDENTS

Decrease in Average Class Size since 2006-2007

225 STUDENTS

Increase in English Language Learners from '06-'07 to '07-'08

EDUCATION

What is it?

Other indicators that help measure the quality and success of public education include academic test scores and expenditure per student. The Scholastic Aptitude Test (SAT) is a standardized test that measures the verbal, math and writing skills of high school seniors seeking college admission. A perfect composite score is 2400 points. A score of 1500 assumes an average score of 500 on each of the three sections, consistent with national averages.

Expenditure per student quantifies the funds spent by the County on each student for essentials such as instruction, books and materials, counseling and transportation.

How is Sonoma County doing?

More high school seniors taking the SAT in Sonoma County do well on the exam compared to the state average. In 2006-2007, 21.8 percent of test takers scored 1500 or above. Statewide, the number was 17.8 percent. However, the percent of students taking the test was lower in Sonoma (33.5 percent) than in the state as a whole (36.9 percent).

This percentage may be due to the SAT's relevance: it is only required of students who plan to apply to four year post-secondary institutions. It should be noted that SAT scores are reflective of a selective student population. Within the county, many students opt to attend Santa Rosa Junior College, which does not require the SAT.

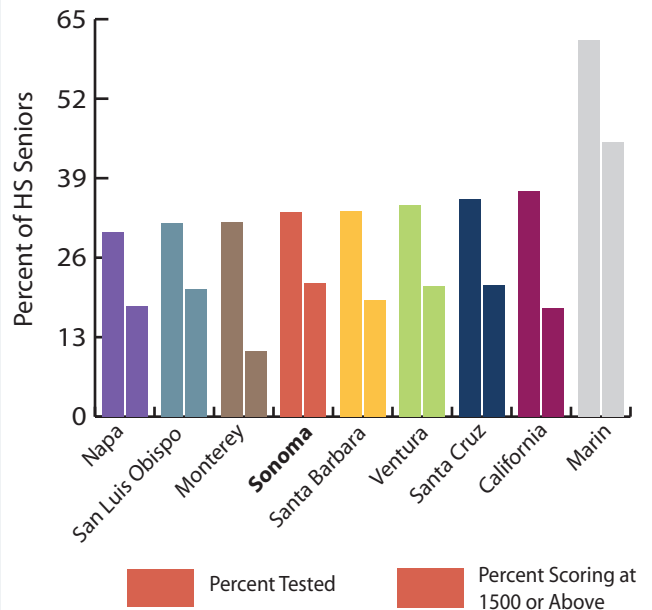
Sonoma County's expenditure per student has increased by \$602 to \$8,047 since 2005-2006. However, Sonoma spends \$70 less than the state average.

Why is it important?

SAT scores are a major component of college admission and gauge general student preparedness for post-secondary education.

Although expenditures per student fluctuate annually based on the number of students in the school system, this indicator allows for a comparison of resources being allocated towards students among various counties.

PERCENT OF HIGH SCHOOL SENIORS TAKING SAT AND PERCENT SCORING AT OR ABOVE 1500, 2006-2007

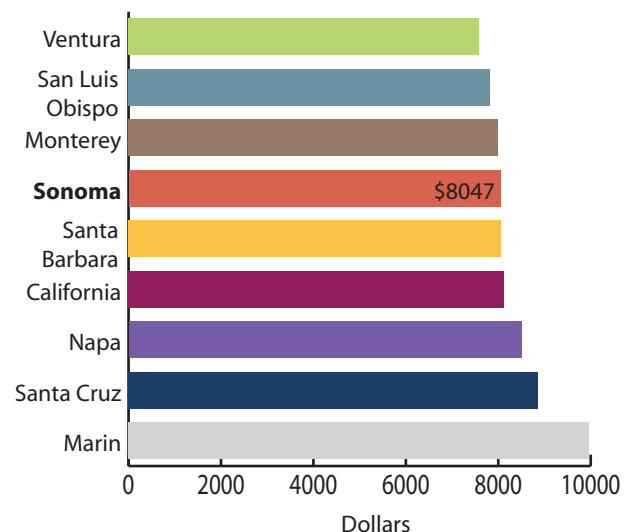


Source: California Department of Education (www.cde.ca.gov)



INCREASE IN EXPENDITURE PER STUDENT, '05-06 TO '06-07

EXPENDITURE PER STUDENT, 2006-2007



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

FOR MORE INFORMATION

Sonoma County Office of Education www.scoe.org	Santa Rosa Junior College www.santarosa.edu
California Department of Education www.cde.ca.gov	Empire College www.empcol.edu
Sonoma State University www.sonoma.edu	

POST-SECONDARY EDUCATION

What is it?

Post-secondary education comprises education levels beyond a high school diploma. College enrollment measures the percentage of the population enrolled in college or graduate school in 2007. Educational attainment calculates the percentage of the population (age 25 and above) with a high school diploma or its equivalent, and a Bachelor's degree or higher post-secondary attainment. Santa Rosa Junior College (SRJC) enrollment includes students enrolled for credit, not for credit, and those in the Community Education Program.

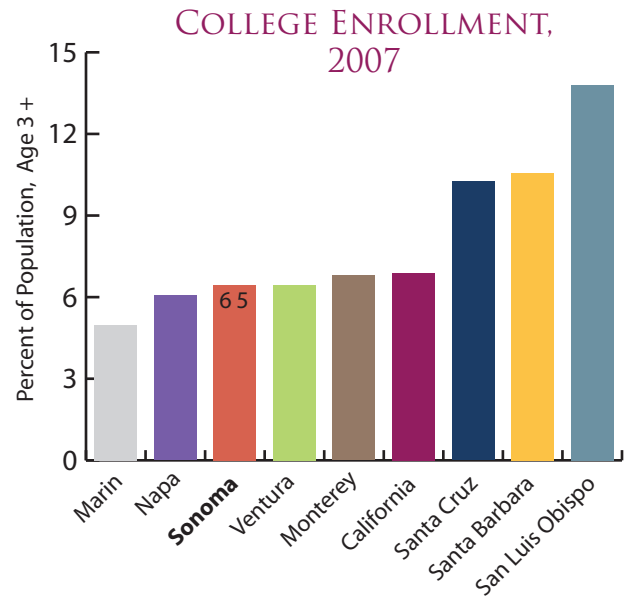
How is Sonoma County doing?

College enrollment in Sonoma County mirrors enrollment percentages in four comparison counties. One factor in high enrollment in Santa Barbara, Santa Cruz and San Luis Obispo counties is the presence of major public universities in those areas.

College enrollment data also reflects age demographics within each region: the absence of a large university and smaller numbers of college-age residents put Sonoma on the lower end of college enrollment. **In spring of 2007, the SRJC enrolled 32,669 students.**

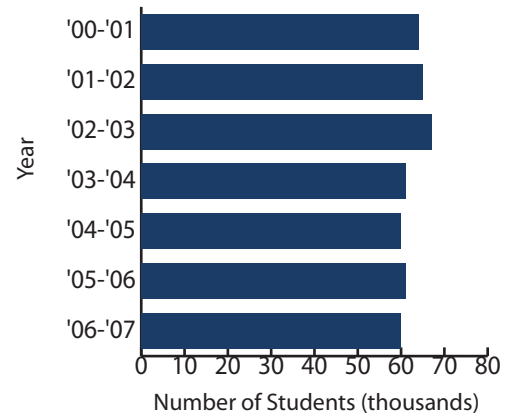
Why is it important?

College enrollment reflects potential changes in the future workforce while educational attainment indicates the skill level of the current workforce. A more educated workforce can command higher wages and is crucial to attracting and retaining businesses.



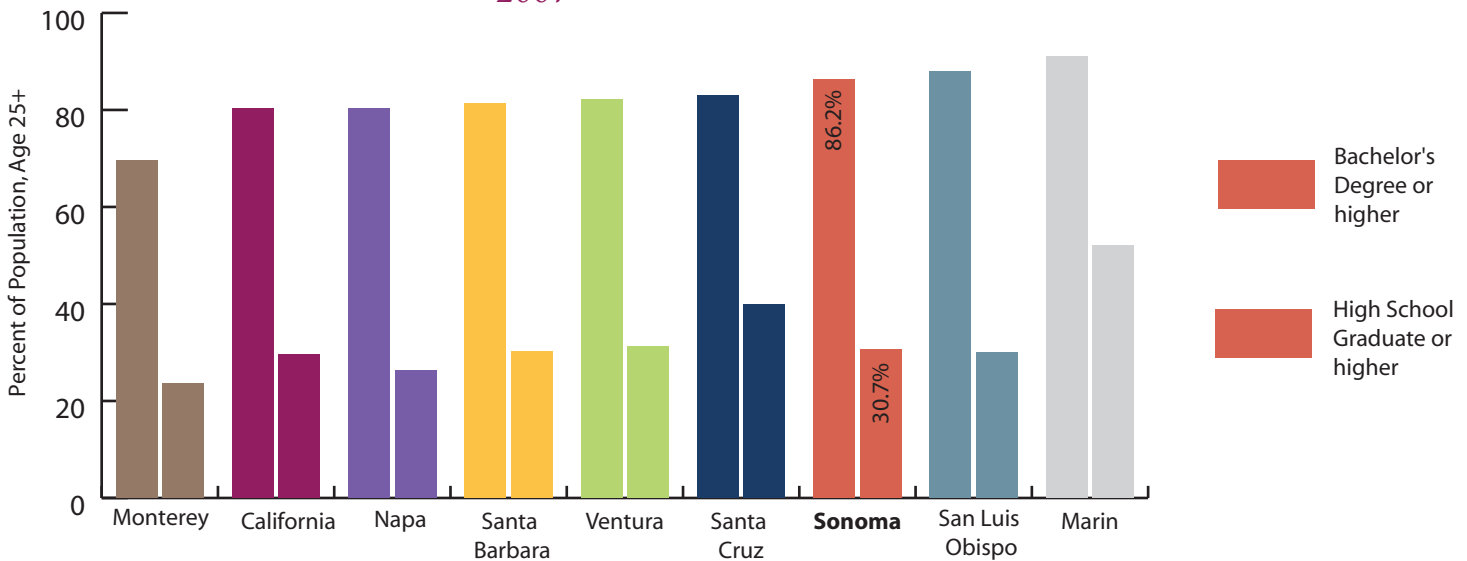
Source: U.S. Census Bureau, 2007 American Community Survey (www.census.gov)

SANTA ROSA JUNIOR COLLEGE ENROLLMENT



Source: Santa Rosa Junior College (www.santarosa.edu/research)

EDUCATIONAL ATTAINMENT, AGE 25 AND ABOVE, 2007



Source: U.S. Census Bureau, 2007 American Community Survey (www.census.gov)

VOTING

What is it?

Voting refers to the population of Sonoma County that engages in casting a ballot for local, state and national elections. Voter information displays voter turnout, political affiliation of registered voters and the number of Sonoma County residents who are eligible and registered to vote. Voter turnout is the percent of registered voters that vote on Election Day; this includes votes by absentee ballots. Eligible voters are residents age 18 and above.

How is Sonoma County doing?

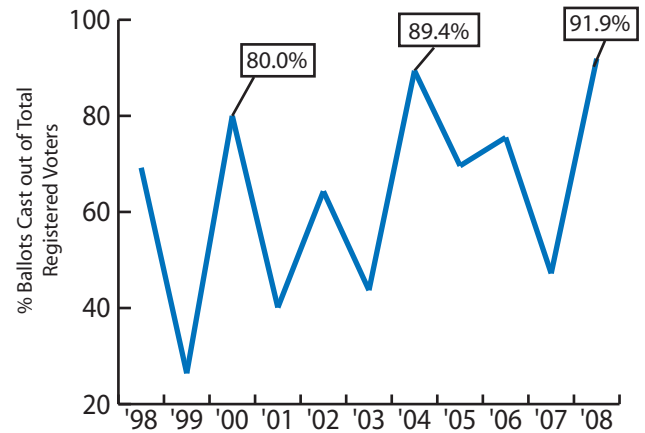
Not surprisingly, the highest voter turnout in Sonoma County occurs during presidential election years. Following historical trends, voter turnout numbers peaked at a ten-year high in November 2008.

68.7 percent of Sonoma's population is eligible to vote, out of which 74.6 percent is registered to vote. The percent of registered voters in Sonoma County is exactly the same as the percentage statewide.

Why is it important?

Voter registration and turnout are important measures of a community's civic engagement. Higher participation results in more government accountability and increased awareness of community programs.

HISTORICAL TURNOUT OF REGISTERED VOTERS SONOMA COUNTY, 1998-2008



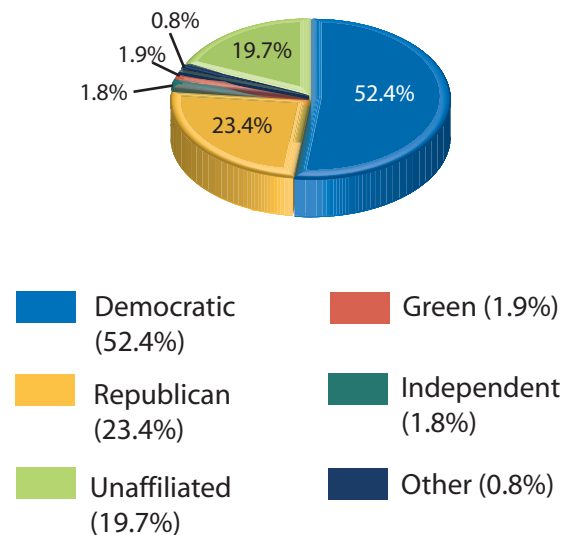
Note: All yearly data obtained from November election results.

Source: Sonoma County Registrar of Voters (www.sonoma-county.org/RegVoter)



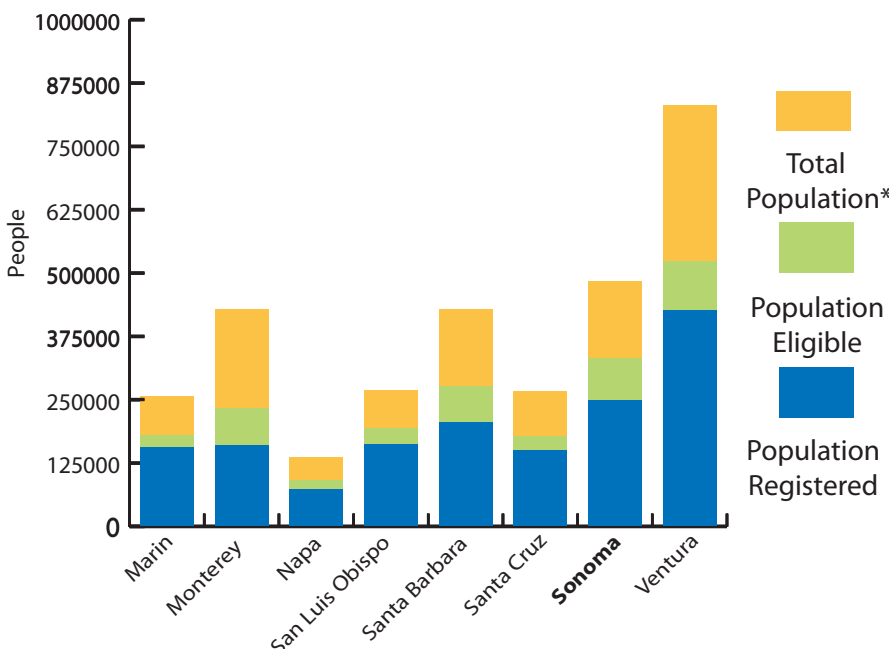
INCREASE IN REGISTERED VOTERS, MAY-NOVEMBER 2008

POLITICAL AFFILIATION OF REGISTERED VOTERS IN SONOMA COUNTY, 2008



Source: Sonoma County Registrar of Voters (www.sonoma-county.org/RegVoter)

ELIGIBLE AND REGISTERED VOTERS BY COUNTY, 2008



*Note: The entire bar height represents the area total population estimates for 2008. Sources: California Secretary of State (www.sos.ca.gov); California Department of Finance (www.dof.ca.gov)

CRIME

What is it?

Data on crime consists of crime rates as well as historical numbers of law enforcement personnel in Sonoma County. Both crime rate and juvenile felony arrest data indicate the rates of violent and property crimes and arrests per 100,000 residents. Violent crimes constitute homicide, assault, rape, robbery and kidnapping, while property offenses include burglary, theft and arson.

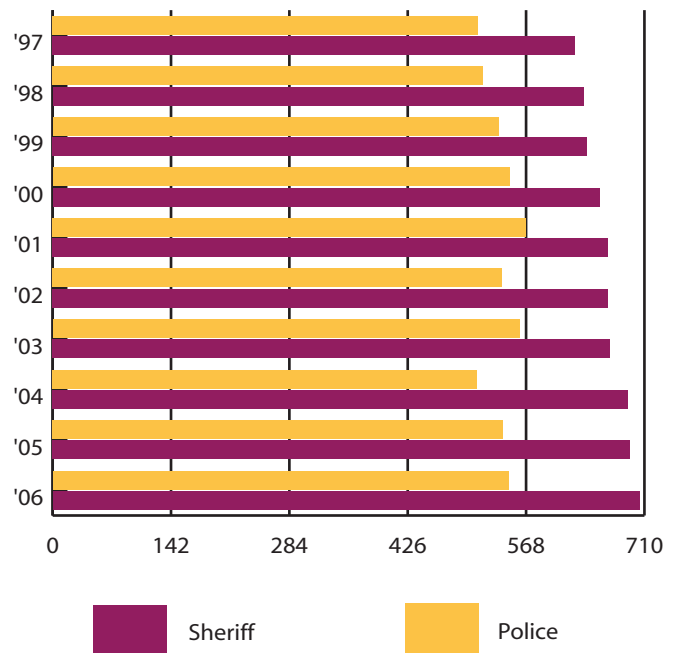
How is Sonoma County doing?

Both the overall crime rate and the number of juvenile arrests trend downward. In 2006, the violent crime rate was 375 per 100,000 residents and the property crime rate was 331 per 100,000. Among juvenile felonies, the violent crime rate is higher than the property crime rate. **2006 saw the highest numbers of Sheriff's Department personnel at 704 employees.** Sonoma County police departments had the third highest employment in 2006 with 547 employees; the greatest number of police staff was 568 in 2001, a possible result of the aftermath of September 11 as these numbers are reflective of employment as of October of each year.

Why is it important?

The number of law enforcement personnel can impact the safety of an area. Crime rates correlate directly with a region's quality of life. Juvenile crime in particular is an important consideration for families deciding whether or not to move to a certain area.

LAW ENFORCEMENT PERSONNEL, 1997-2006



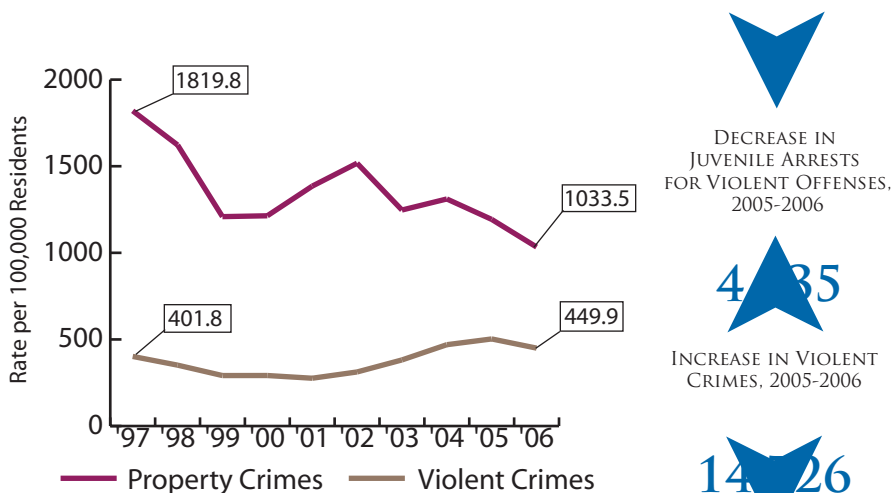
Sources: Sonoma County Sheriff's Department (www.sonomasheriff.org); California Department of Justice (<http://ag.ca.gov/cjsc>)

FOR MORE INFORMATION

California Department of Justice
<http://ag.ca.gov/cjsc>

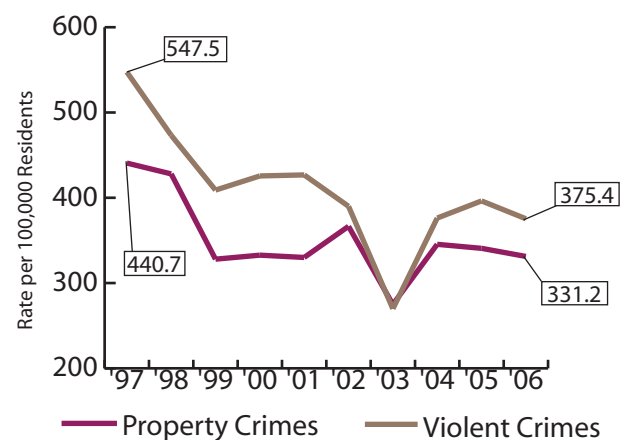
Sonoma County Sheriff's Department
www.sonomasheriff.org

CRIME RATE PER 100,000 RESIDENTS



Source: California Department of Justice (<http://ag.ca.gov/cjsc>)

JUVENILE FELONY ARRESTS PER 100,000 RESIDENTS



Source: California Department of Justice (<http://ag.ca.gov/cjsc>)

HOUSING

What is it?

Housing indicates property that is used as a primary residence. The median home price is the middle of the range of home prices for Sonoma County for any given month. The affordability index highlights the percent of the population that can afford a median priced home as first-time buyers. Calculations for the index include the median home price, assumption of a 10 percent down payment and loan interest rates. A monthly payment is then calculated, which also includes property taxes and home insurance. The affordability index assumes that homeowners' monthly payments will not exceed 40 percent of their household income.

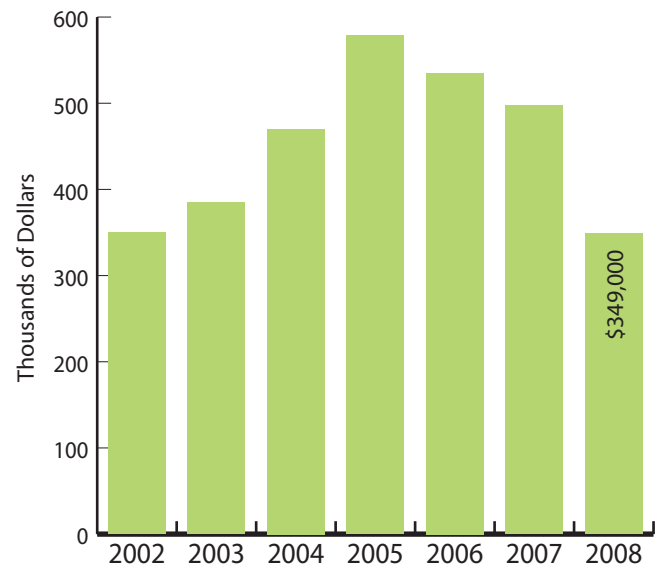
How is Sonoma County doing?

Sonoma County has historically been more expensive than the rest of the nation. While 67 percent of the population in the U.S. can afford a median priced home in 2008, only 46 percent of Sonoma County meets that standard.

Why is it important?

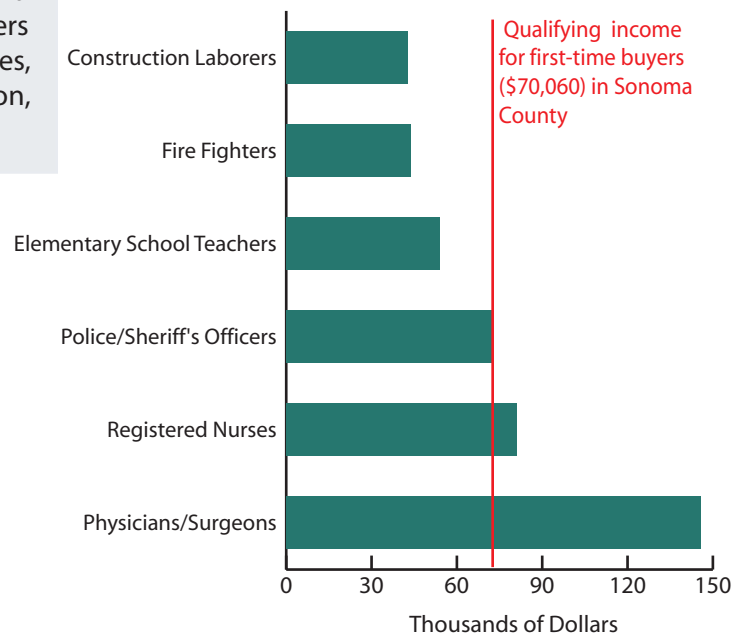
Historically, Sonoma's greatest advantage has been the quality of life it offers its residents, and housing is a large factor. Affordable housing is an important aspect of a strong, reliable economy. High relative prices may force businesses to locate elsewhere and discourage young families from moving to Sonoma. Workers settling outside of the county results in longer commutes, decreased productivity, increased pollution and traffic congestion, all of which negatively impact the region's quality of life.

AVERAGE MEDIAN HOME PRICE, SONOMA COUNTY



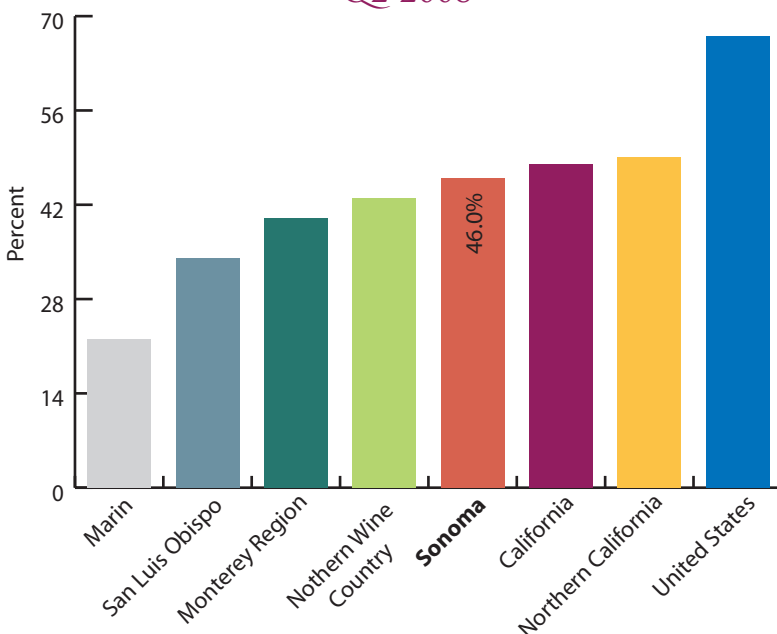
Source: California Association of Realtors (www.car.org)

YEARLY SALARIES BY PROFESSION (\$ THOUSANDS)



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

AFFORDABILITY INDEX,* Q2 2008



*Note: Percent able to afford median priced home
Source: California Association of Realtors (www.car.org)

FOR MORE INFORMATION

California Association of Realtors
www.car.org

North Bay Association of Realtors
www.norbarrealtor.com

HIGHLIGHTS

An 8 percent increase in destination spending year-over-year in 2006 is the fastest growth rate among competitive counties, and second-fastest statewide.

\$19.9 million in Transient Occupancy Tax revenue collection for 2007 shows the fastest year-over-year growth among competitive counties.

The tourism indicators look at the economic impact of visitors to Sonoma County. Visitor destination spending generates tax revenue, contributes to the lodging industry performance, and results in industry earnings, which support the local tourism industry workforce. Key measures continue to increase, but this sector could face challenges with a slowing national economy.

The average daily room rate in 2007 was \$127.40, a record high for Sonoma County.

DESTINATION SPENDING

What is it?

Destination spending is the money spent by visitors during their stay in Sonoma County. This includes, but is not limited to, spending on accommodations, food and beverage, entertainment, transportation and retail.

How is Sonoma County doing?

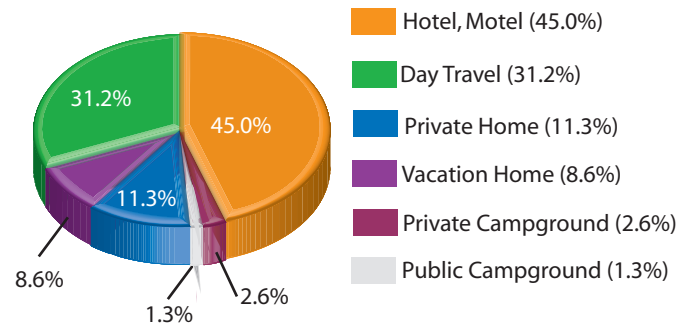
Sonoma County has the fourth-largest destination spending among comparable counties at \$1.24 billion in 2006. Total destination spending in Sonoma County increased 8 percent year-over from 2005, the fastest growth rate among comparative counties and second fastest statewide. **Visitors staying in hotels or motels are the most profitable type of traveler, generating \$556 million of the total \$1.24 billion.**

Despite the recent nationwide industry slowdown, the relative stability of demand for wine, improved air service to Sonoma County and the increase in international tourism due to the weak dollar have bolstered destination spending. These factors as well as the proximity of Sonoma County to the Bay Area help maintain the tourist inflows and maintain destination spending strength. However, destination spending does reflect discretionary consumption, which slows in times of recession and does not recover until consumers once again feel confident and optimistic in the future of the economy.

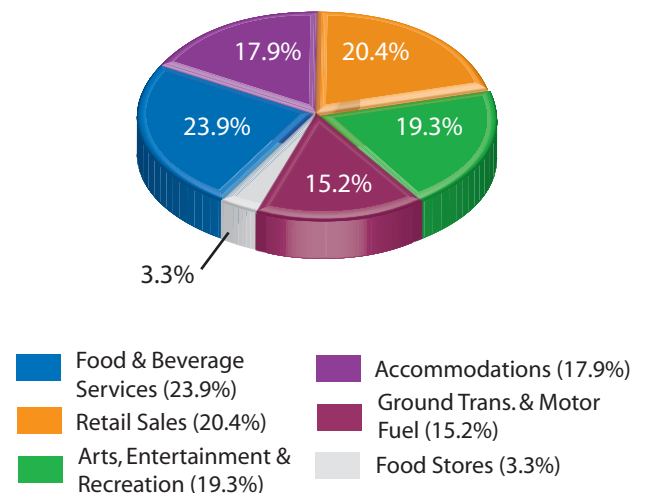
Why is it important?

The destination spending by leisure and business travelers benefits a variety of industries throughout the county and bolsters Sonoma County's financial capital. The over \$1 billion in destination spending generates revenue for both the public sectors through state and local taxes, as well as private sector businesses through the creation and support of local employment.

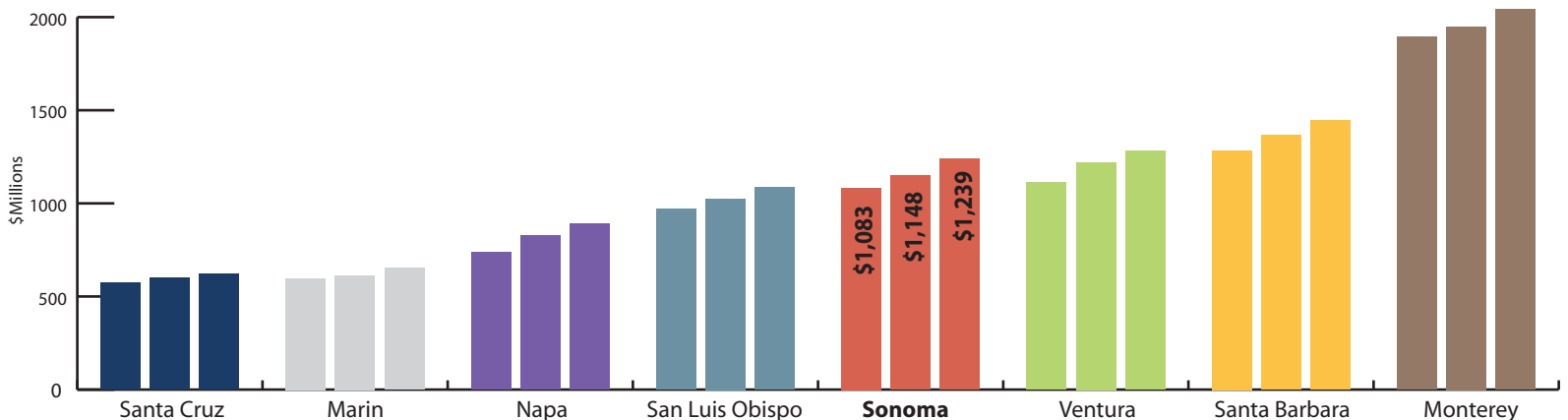
DISTRIBUTION OF VISITOR SPENDING BY TYPE OF TRAVEL ACCOMMODATION, SONOMA COUNTY, 2006



DISTRIBUTION OF VISITOR SPENDING BY COMMODITY PURCHASED, SONOMA COUNTY, 2006



DESTINATION SPENDING 2004-2006, (\$MILLIONS)



Source, all data: California Travel Impacts by County, 2006. Prepared for the Division of Tourism, California Trade and Commerce Agency by Dean Runyan & Associates, 2006 (www.visitcalifornia.com)

INDUSTRY EMPLOYMENT

What is it?

Industry employment refers to the jobs in the county that provide tourism services. These jobs are generated and funded through tourist spending and demand for services. Major local tourism industries include accommodation, food and beverage service, retail, arts, entertainment and recreation.

How is Sonoma County doing?

Tourism employment holds steady at nearly 6 percent of the total workforce as Sonoma County continues a strong recovery from industry shocks in 2001. Workforce health is reliant upon discretionary spending and is therefore sensitive to recession. **Destination spending generated 15,900 jobs in 2006,** providing higher industry employment than North Bay competitors Marin and Napa.

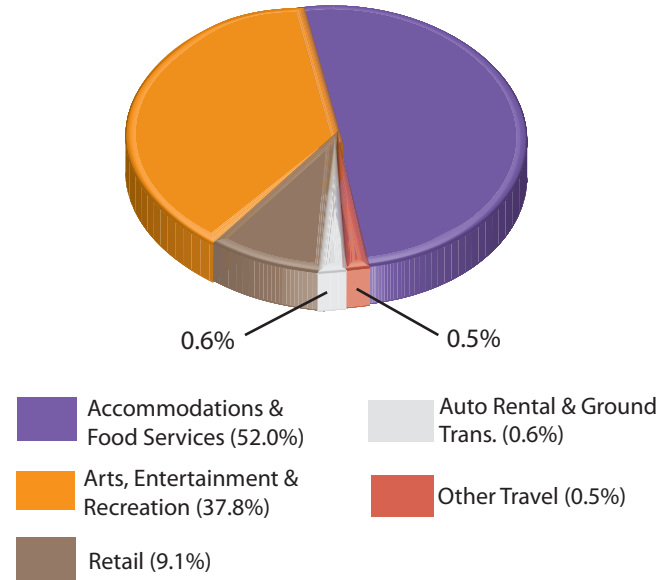
At a 2.8 percent increase from 2005, tourism job growth in Sonoma County was only outpaced in Marin, Napa, and Santa Barbara Counties. With destination spending growth at 8 percent, spending per tourism employee will also continue to grow, narrowing the gap between Sonoma and comparison counties.

There is currently an average of one industry job for every \$78,000 in destination spending. **52 percent of jobs are in the accommodations and food services sectors, which correspondingly earn the greatest proportion of industry earnings.**

Why is it important?

The \$1.24 billion tourism industry is a vital part of Sonoma County's economy. It is comprised of accommodation establishments, food and beverage services, transportation providers, arts and entertainment, recreation, and retailers, and is a key component for many companies in numerous industries. Visitor destination spending represents a considerable percentage of revenue for local companies, sustaining and providing local jobs.

TOURISM WORKFORCE BY SECTOR, 2005-2006



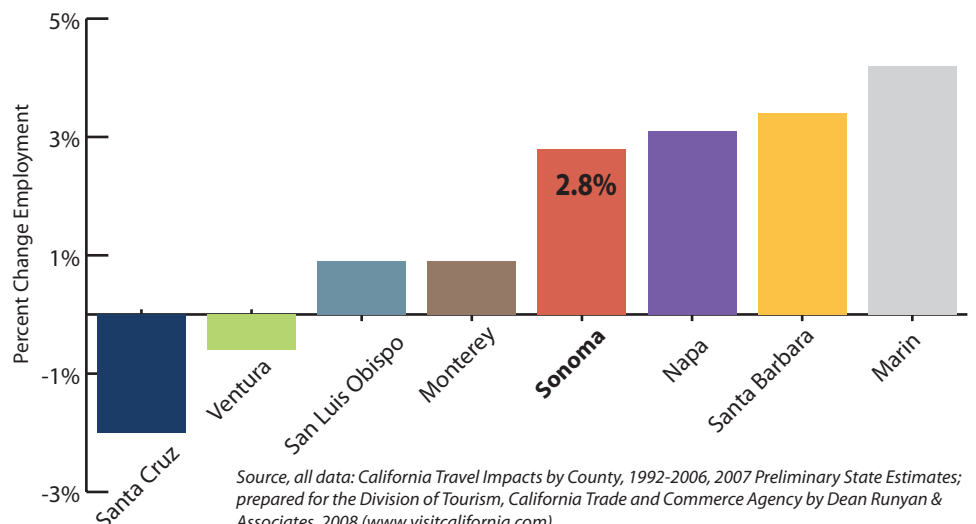
FOR MORE INFORMATION

California Travel and Tourism Commission
www.visitcalifornia.com

Dean Runyan & Associates
www.deanrunyan.com

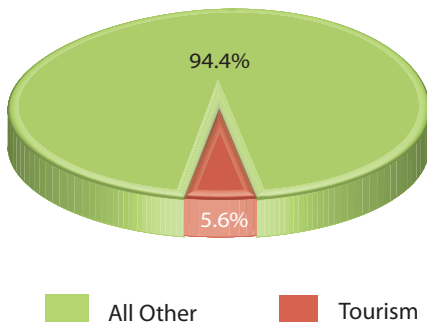
Sonoma County Tourism Bureau
www.sonomacounty.com

ANNUAL PERCENTAGE CHANGE IN TOURISM EMPLOYMENT, 2005-2006



Source, all data: California Travel Impacts by County, 1992-2006, 2007 Preliminary State Estimates; prepared for the Division of Tourism, California Trade and Commerce Agency by Dean Runyan & Associates, 2008 (www.visitcalifornia.com)

TOURISM PERCENTAGE OF TOTAL COUNTY WORKFORCE, 2005-2006



LODGING INDUSTRY PERFORMANCE

What is it?

Lodging industry performance measures the demand and popularity of a destination. The measures tend to fluctuate seasonally, but year-over comparisons help gauge the health of the local hotel and tourism industry. The occupancy rate of a hotel is the percentage of rooms in use out of the total available over a specified period. The average daily rate is the average cost per room at a given property.

How is Sonoma County doing?

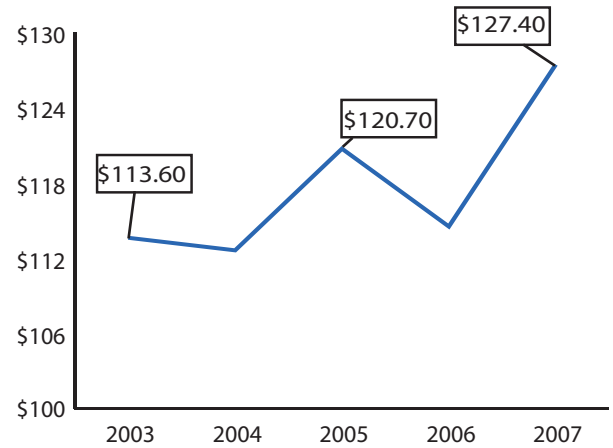
The average daily rate reached a record high in 2007 of \$127.40, an 11.3 percent increase over 2006. This is a positive indicator for the health of the lodging industry because visitors staying in hotels and motels generate the most destination spending during their time in Sonoma County.

At 64 percent, occupancy rates have remained relatively stable since 2006. In 2007, Sonoma County ranked lower in occupancy than several of its California competitors. However, the stability of rates amidst expansion in room offerings suggests growing demand in lodging.

Why is it important?

Visitors staying overnight are a large source of revenue in Sonoma County, providing tax and destination spending benefits to the county and city governments as well as to a variety of businesses. Overnight stays alone generate 18 percent of total destination spending revenues.

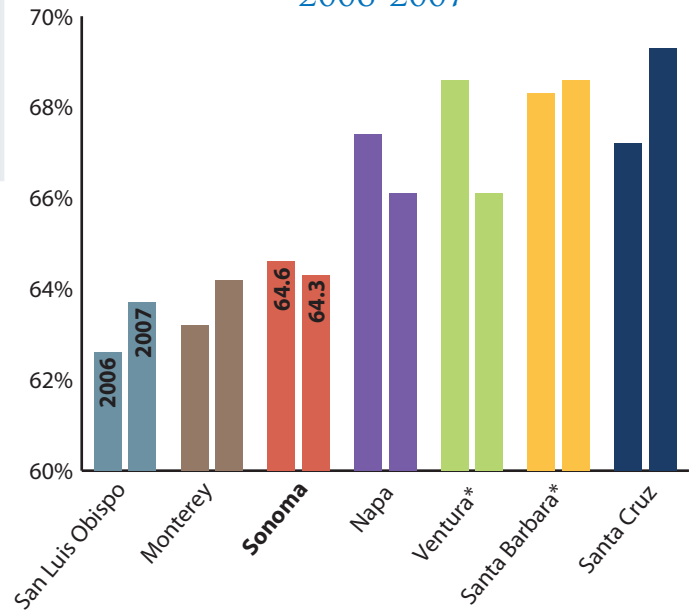
ANNUAL AVERAGE DAILY RATE, SONOMA COUNTY (2008 \$)



11.3%

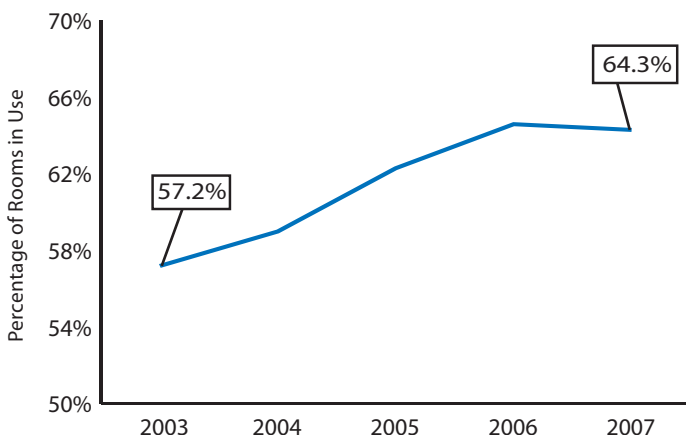
Percent Increase in Annual Average Daily Rate, 2003-2006

ANNUAL OCCUPANCY RATES, 2006-2007



Note: Ventura County figure represents both Ventura and Oxnard Counties. Santa Barbara County figure represents both Santa Barbara and Santa Maria, as presented by Smith Travel Research in the December 2007 Monthly California Lodging Trends Report.

ANNUAL OCCUPANCY RATES, SONOMA COUNTY, 2003-2007



Source, all data: Smith Travel Research, 2008. Average Daily Rate adjusted for Inflation using the US Bureau of Labor Statistics Consumer Price Index.

TOURISM-RELATED TAXES

What is it?

Tax revenue raised by tourist spending is generated through both local and state taxes. One major source of visitor funded tax revenue is the Transient Occupancy Tax (TOT), a local tax on room rental revenue in lodging properties located in Sonoma County. Destination spending by day and overnight visitors generates a significant portion of taxes paid to state and local governments. TOT receipts indicate the level and distribution of travel-related economic activity in Sonoma County. Because they are unrestricted funds, they are available for any legitimate county expense, as directed by the County Board of Supervisors and city councils.

How is Sonoma County doing?

Between fiscal years 2002 and 2007, total TOT collected grew 63 percent, from \$13.1 million to \$19.9 million. Sonoma County experienced the highest year-over growth rate in 2006 of all comparison counties.

Total local taxes collected, including TOT, in 2006 were estimated at \$26.2 million, a 13 percent increase from 2005 (\$23 million). Tax receipts create a source of revenue for the state, contributing approximately \$49 million in 2006, a 6 percent increase from 2005 (\$46.2 million). **Together, state and local taxes generated by visitors totaled \$75.2 million.**

Why is it important?

Tourism is a significant source of tax revenue for local government, with visitor-generated tax revenue currently at 19.2 percent of total local tax receipts. The tax code does not require specific utilization of TOT funds; however, the county government allocates a portion to finance advertising and promotional activities in Sonoma County.

FOR MORE INFORMATION

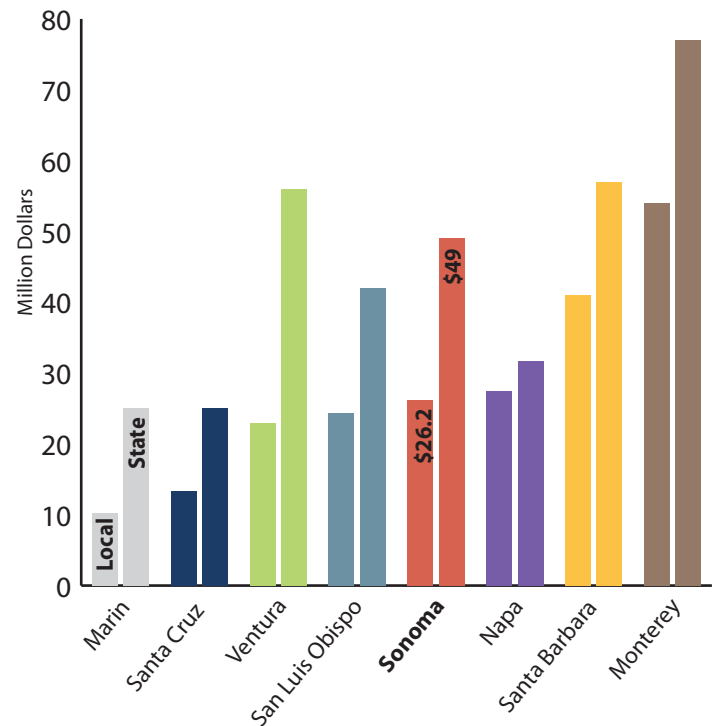
California Travel and Tourism Commission
www.visitcalifornia.com

Dean Runyan & Associates
www.deanrunyan.com

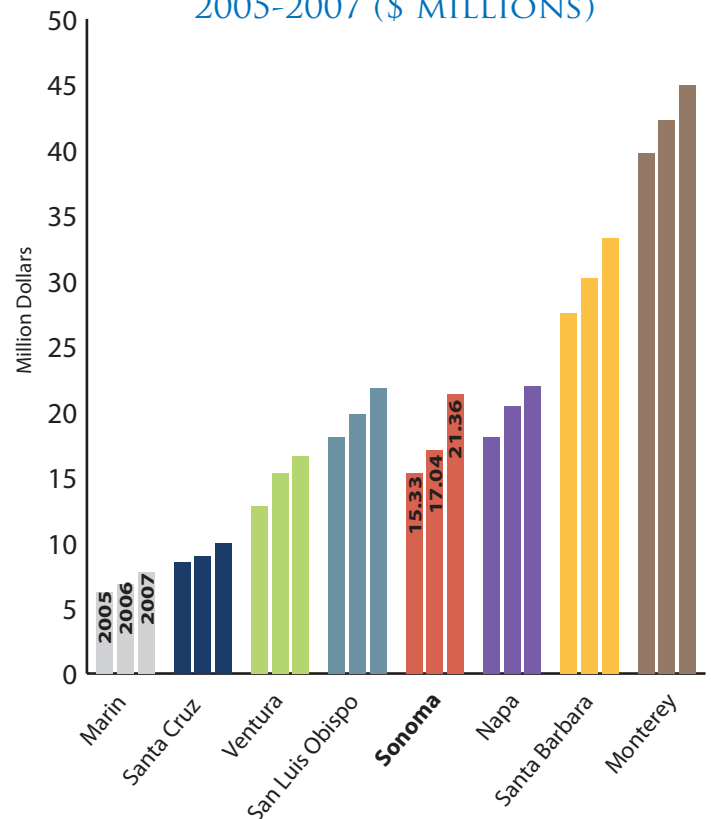
Sonoma County Tourism Bureau
www.sonomacounty.com

Source, all data: California Travel Impacts by County, 1992-2006, 2007 Preliminary State Estimates; Prepared for the Division of Tourism, California Trade and Commerce Agency by Dean Runyan and Associates, 2008.

VISITOR GENERATED TAX RECEIPTS, 2006 (\$ MILLIONS)



TOTAL TRANSIENT OCCUPANCY TAX COLLECTED, 2005-2007 (\$ MILLIONS)



INDUSTRY EARNINGS

What is it?

Industry earnings refers to the revenue generated through destination spending by travelers to Sonoma County. This revenue is earned directly by local businesses when visitors purchase the products and services they provide.

How is Sonoma County doing?

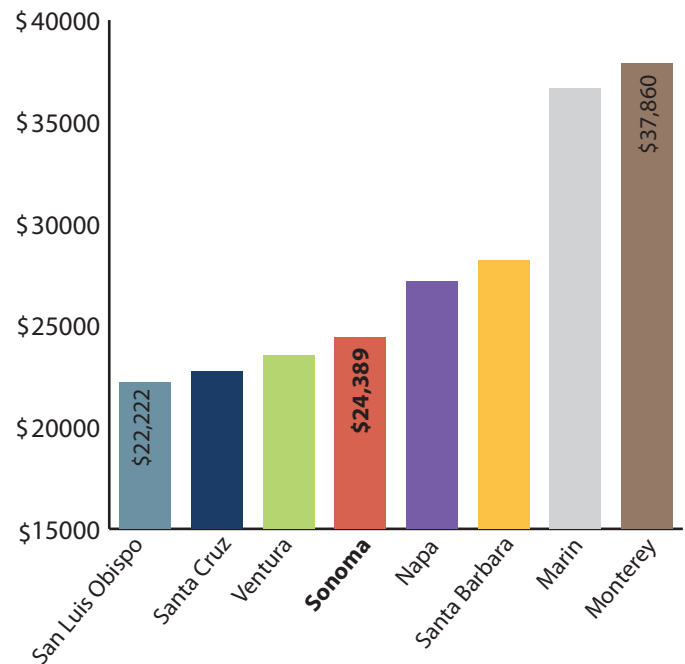
In 2006, total industry earnings generated by travel spending increased to \$388 million, up 23.9 percent from 2001 (\$312.9 million). This figure places Sonoma County behind only Santa Barbara and Monterey Counties in total industry earnings. However, when put in perspective of earnings per industry job, Sonoma drops in its ranking behind the lesser populated Napa and Marin counties. The record growth in destination spending and industry earnings should help close the lag in earnings per employee.

After a slight drop in visitor-generated earnings in 2001, all industries have seen continual annual growth with the exception of the "other travel" sector, which includes resident air travel and travel agencies.

Why is it important?

Visitors traveling to Sonoma County generate revenue and jobs in local tourism related businesses through destination spending. This revenue in turn spills over to improve the overall economy. Substantial growth in high-revenue and in previously under-performing industries are promising long term indicators for the local economy.

INDUSTRY EARNINGS PER TOURISM INDUSTRY JOB, 2006, (\$MILLIONS)

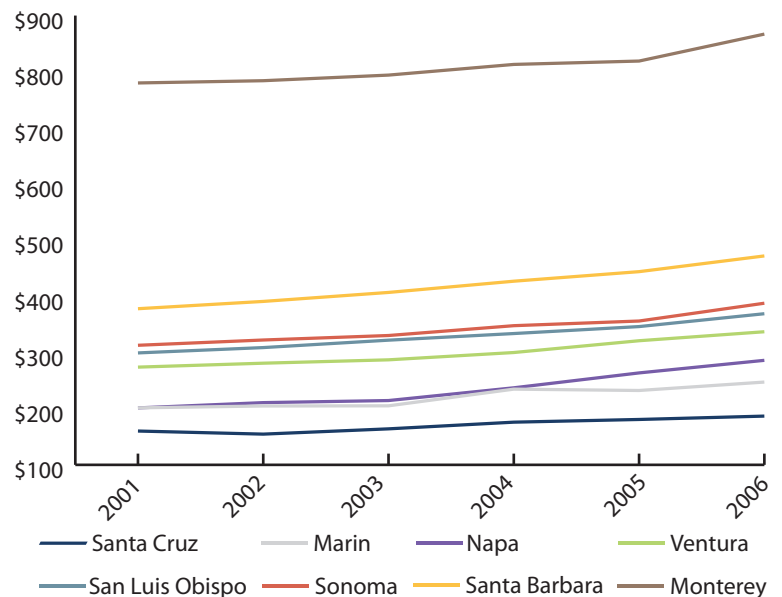


FOR MORE INFORMATION

California Travel and Tourism Commission
www.visitcalifornia.com

Dean Runyan & Associates
www.deanrunyan.com

TOTAL INDUSTRY EARNINGS GENERATED BY TRAVEL SPENDING, (\$MILLIONS)



SECTORAL EARNINGS GENERATED BY TRAVEL SPENDING, (\$ MILLIONS)			
Sonoma County Industry	2005	2006	% Change
Accommodations & Food Service	194.3	212.6	9.4%
Arts, Entertainment & Recreation	116.3	126.5	8.8%
Retail	40.3	42.7	6.0%
Auto Rental & Ground Transportation	3.1	3.2	3.2%
Air Transportation (visitor only)	0.0	0.0	0.0%
Other Travel (resident air travel & travel agencies)	2.0	2.8	40.0%
Total	356.0	387.8	8.9%

Source, all data: California Travel Impacts by County, 2007 Preliminary State Estimates. Prepared for the California Travel & Tourism Commission by Dean Runyan and Associates, March 2008.

HIGHLIGHTS

In this section are indicators such as population size, industrial growth and affordability of fair market rent. They illustrate strengths and challenges to the local economy while highlighting demographic change.

Net migration totaled -417 people in 2007, a balance of increased domestic out-migration and large numbers of foreign in-migration. 2007 saw a decrease in the number of people leaving Sonoma County and a stabilization of foreigners coming to Sonoma, a reinforcement of the County's attractiveness for relocation.

There will be an average of 850 annual job openings that require a Bachelor's degree, based on projections for 2004-2014. This indicates a demand for successful high school completion and subsequent enrollment in post-secondary education.

Sonoma County's population is projected to increase 57 percent by 2050, which will add more human capital to the workforce but will also require sufficient preparation from health care services and educational institutions to serve growing needs.

DEMOGRAPHICS

What is it?

Demographics are selected indicators that characterize a community. Common demographic trends are population size and makeup, which describe changes in demographics over time. Knowledge about an area's population is crucial to determine workforce needs and to assess the extent to which they are being met.

How is Sonoma County doing?

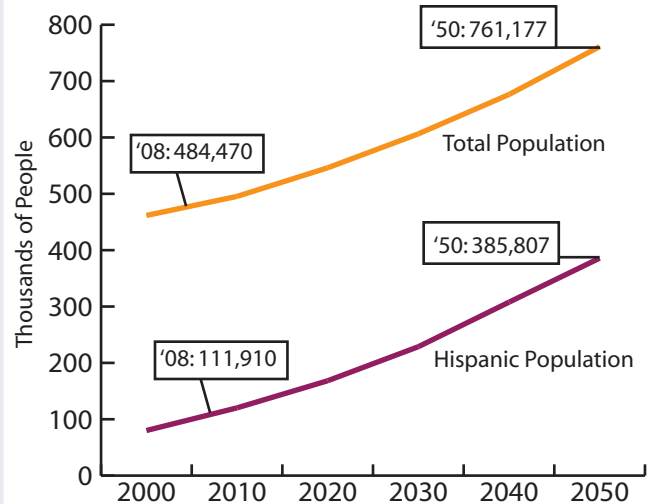
Sonoma County is home to approximately 484,470 residents with a projected increase of 57 percent by 2050. The ethnic makeup of the county is expected to change dramatically as well: **50 percent of the population in Sonoma will be Hispanic by 2050, compared to 17 percent in 2000.**

Age demographics will also change significantly by 2050: Sonoma will have greater numbers of younger (ages 9 and under) and older (ages 80 and above) residents. In general, there is a growing amount of young Hispanics and an increasing amount of older whites.

Why is it important?

The rise in younger residents will require accommodations by the school system and the demand for health care and services is expected to increase as Sonoma County's population ages. The study of demographic change informs public policy decisions regarding the labor force, workforce development and business planning.

POPULATION PROJECTIONS, (THOUSANDS)



PERCENT POPULATION BY ETHNICITY

	2000	2050 (P)	Percent Change
White	75.0%	34.0%	-54.7%
Hispanic	17.0%	50.7%	198.2%
Asian	3.0%	9.50%	216.7%
Pacific Islander	0.19%	0.15%	78.6%
Black	1.40%	2.50%	78.6%
American Indian	0.80%	1.30%	62.5%
Multirace	2.10%	2.10%	0%

Note: (P)= Projected

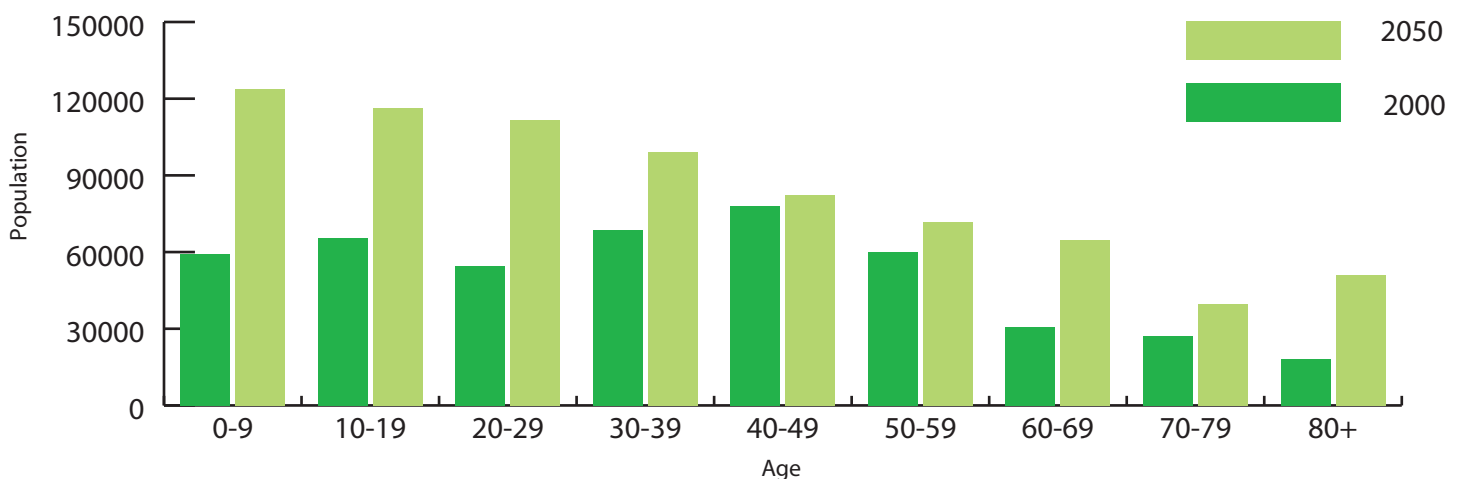
97.7%

PROJECTED PERCENTAGE INCREASE
IN POPULATION AGED 0-19,
2000-2050

102%

PROJECTED PERCENTAGE INCREASE
IN POPULATION AGED 60-80+,
2000-2050

POPULATION BY AGE, 2000-2050



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

OCCUPATIONAL TRENDS

What is it?

Occupational trends are changes in job requirements in Sonoma County as well as growth within the local economy. Level of educational requirement and training of the workforce both influence the local labor pool available to businesses. This in turn determines the types of businesses that are established in a specific region. Types of occupations shed light on wages and the diversity of opportunity in the county.

How is Sonoma County doing?

Projected job openings for Sonoma County show a high need for post-secondary education and on-the-job training. **In particular, those with a Bachelor's degree will continue to be high in demand.**

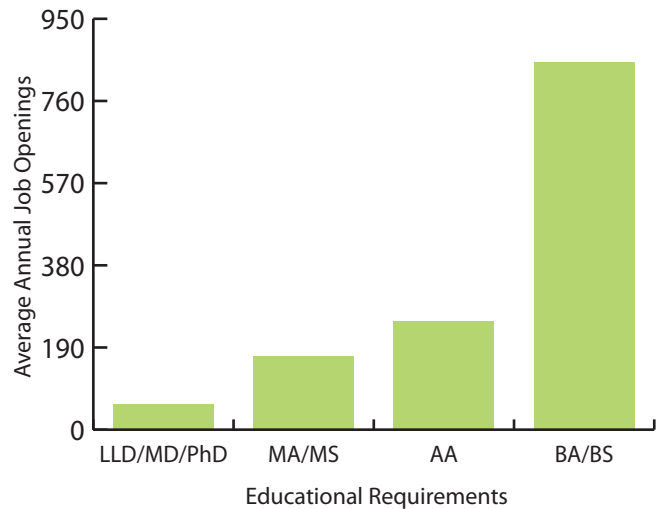
Among the fastest growing occupations based on employment, a range of sectors is represented, from technologically oriented occupations to professions in the health industry. **The broad variety emphasizes the growing business diversity that is tapping into the talent pool available in Sonoma County.**

Why is it important?

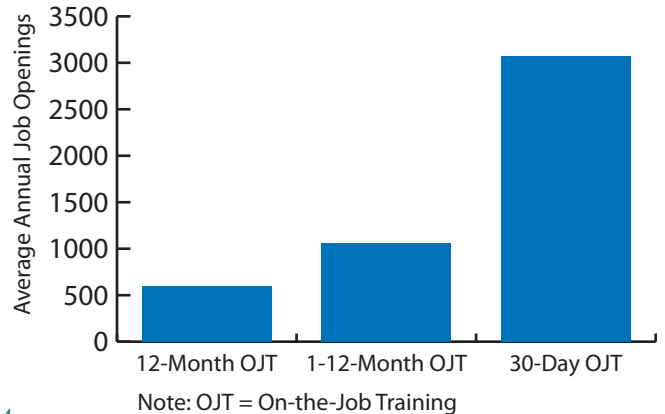
Education and training requirements tend to correlate to occupational wages: generally, occupations that require higher levels of education and on-the-job training also provide higher wages.

Understanding these requirements allows job seekers to prioritize preparation for entering the workforce and aides workforce professionals in maintaining a competitive workforce.

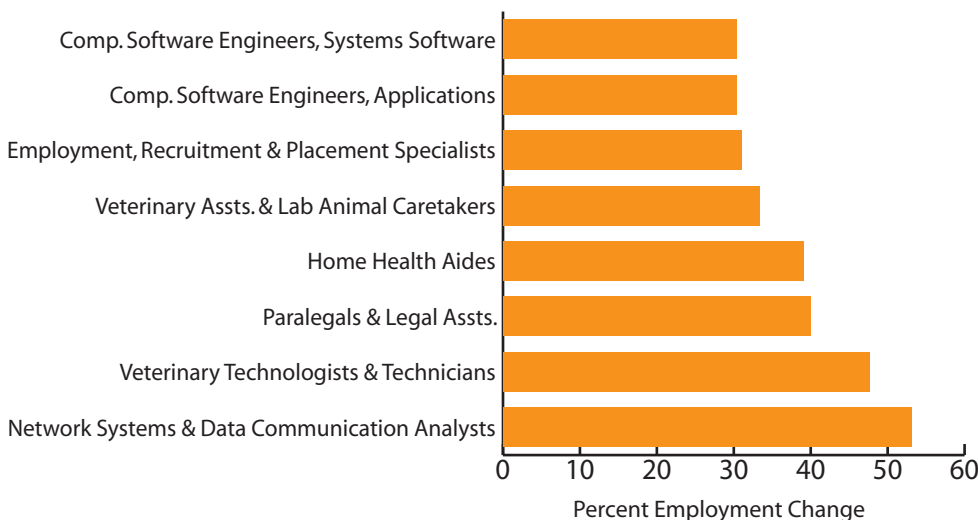
PROJECTED EDUCATIONAL REQUIREMENTS FOR EMPLOYMENT, 2004-2014



PROJECTED TRAINING REQUIREMENTS FOR EMPLOYMENT, 2004-2014



FASTEST GROWING OCCUPATIONS, 2004-2014



FOR MORE INFORMATION

Employment Development Department
www.labormarketinfo.edd.ca.gov

California Department of Finance
www.dof.ca.gov

U.S. Department of Housing & Urban Development
www.hud.gov

Sonoma County Workforce Investment Board
www.sonomawib.org

INDUSTRIAL TRENDS

What is it?

Industrial trends are changes in employment for selected local industries and median hourly wages for selected occupations. Median hourly wages are the

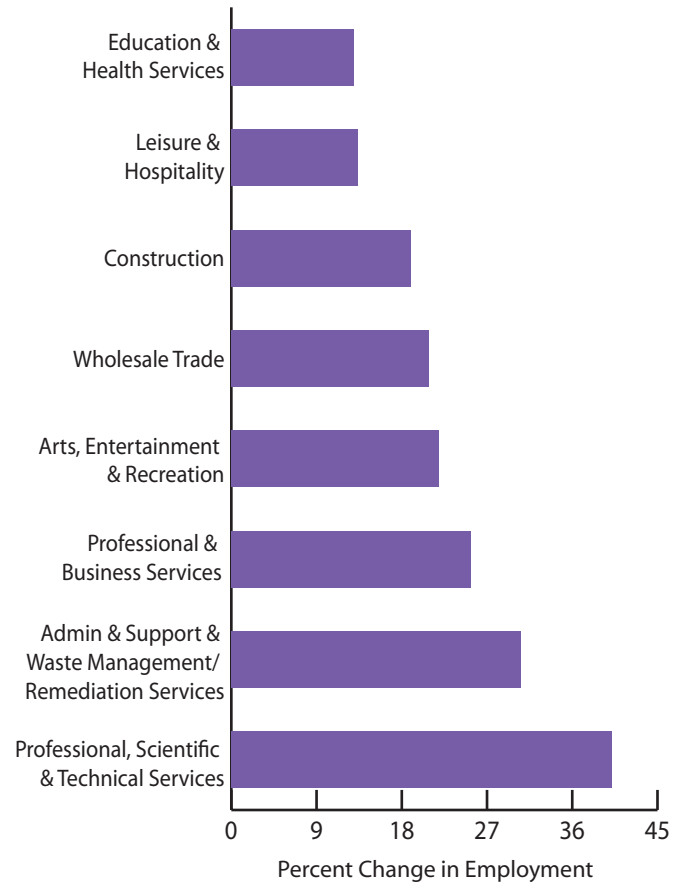
How is Sonoma County doing?

The Professional, Scientific and Technical Services sector is projected to be the fastest-growing in the county at 40.2 percent during 2004-2014. Sonoma County's location and workforce make it an attractive region for many industries, as evidenced by the range of industries poised for growth. Diversity in industry also creates diversity in occupations, resulting in jobs with a variety of training and education requirements and wage benefits.

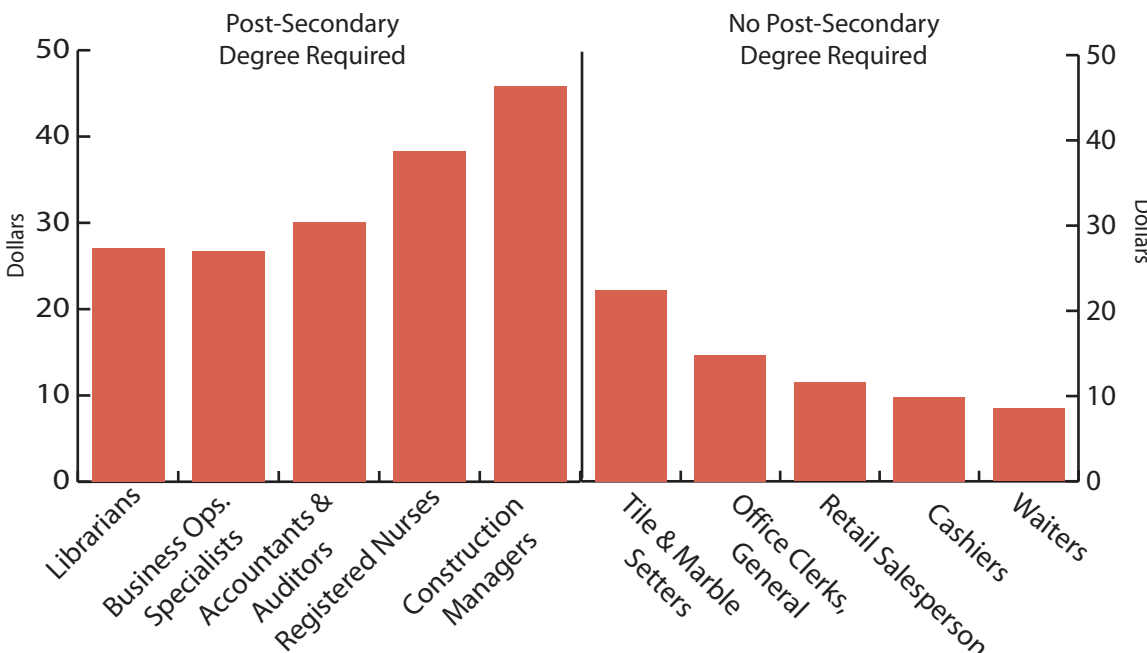
Why is it important?

Thriving industries are an asset to local economies because they utilize regional strengths such as available workforce, geographical location and educational institutions. By seizing upon the advantages of a given area, businesses and organizations succeed, in turn creating a vital local economy. Analyzing shifts in industry development allows educators, employers and job seekers to capitalize on existing strengths and recognize vulnerabilities in the workforce. Measuring occupational growth is essential to prepare workers to enter industries that will have the highest demands in the future. A well-trained workforce is instrumental in sustaining a healthy economy.

FASTEST GROWING INDUSTRIES IN SONOMA COUNTY, 2004-2014



MEDIAN HOURLY WAGES FOR SELECTED OCCUPATIONS, 2008



12.0%

PROJECTED INCREASE IN EMPLOYMENT FOR EDUCATION & HEALTH SERVICES, 2004-2014

40.2%

PROJECTED INCREASE IN EMPLOYMENT FOR PROFESSIONAL, SCIENTIFIC & TECHNICAL SERVICES, 2004-2014

Source, all data: Employment Development Department (www.labormarketinfo.edd.ca.gov)

FAIR MARKET RENT

What is it?

Fair Market Rent (FMR) is a Housing and Urban Development (HUD) classification that includes shelter rent and the cost of utilities for a median apartment. HUD's affordability guidelines recommend that an individual spend no more than 30 percent of one's income on housing and related costs.

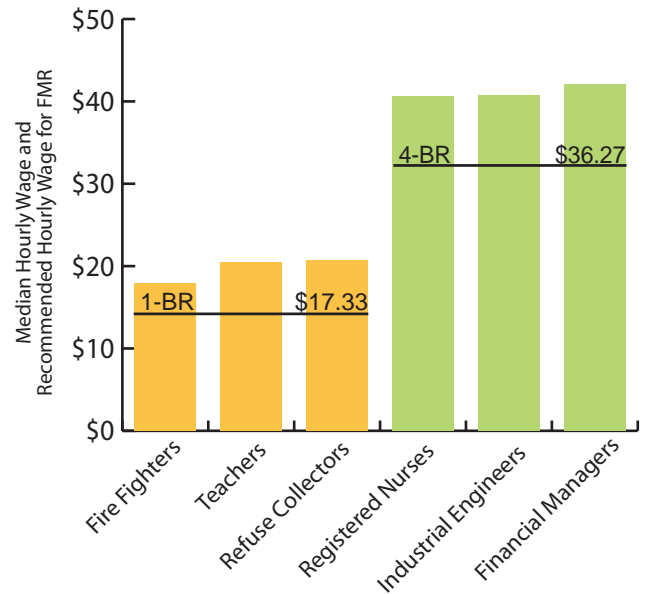
How is Sonoma County doing?

FMR increased by 14 percent in 2009 after a five-year plateau. Because calculations estimate gross rent, including all utilities and accounts for inflation, recent trends in higher energy costs and inflationary pressure are major contributors to the increased FMR. Sonoma County's FMR is affordable compared to other counties for a one-bedroom apartment and slightly more expensive in terms of affordability for a four-bedroom apartment. Incomes needed to afford such housing fall in a range of various occupational wages in Sonoma County. **This indicates that residents employed in a wide variety of occupations can afford to rent an apartment in Sonoma County, but that it is dependent on family size.**

Why is it important?

A shortage of affordable housing restricts the ability of moderate-income renters to save for a down payment, negatively impacting the housing market. Relatively high prices influence business location decisions as well as discourage a younger population from settling in a region.

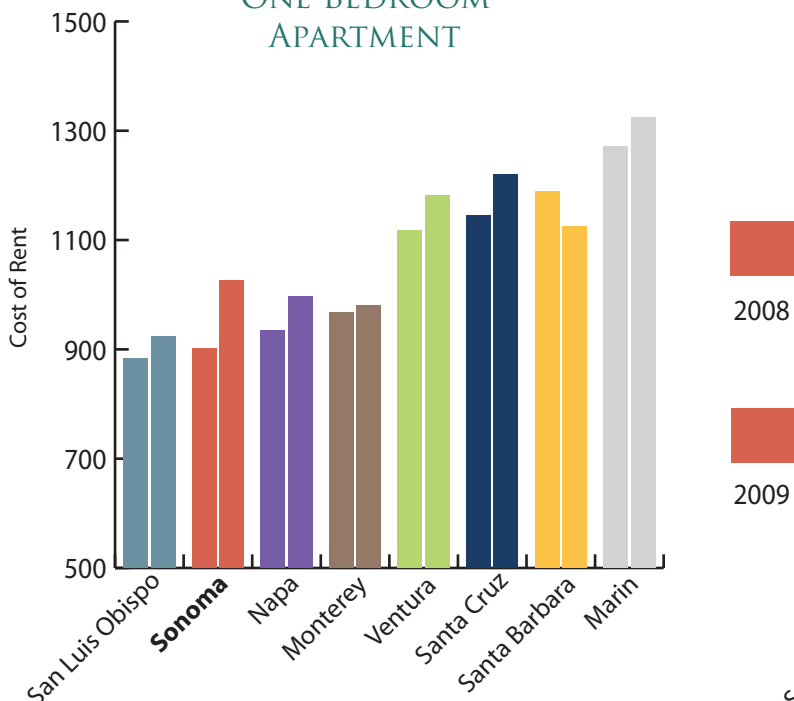
AFFORDABILITY OF FAIR MARKET RENT SONOMA COUNTY, 2008



Note: Based on HUD Affordability Guidelines

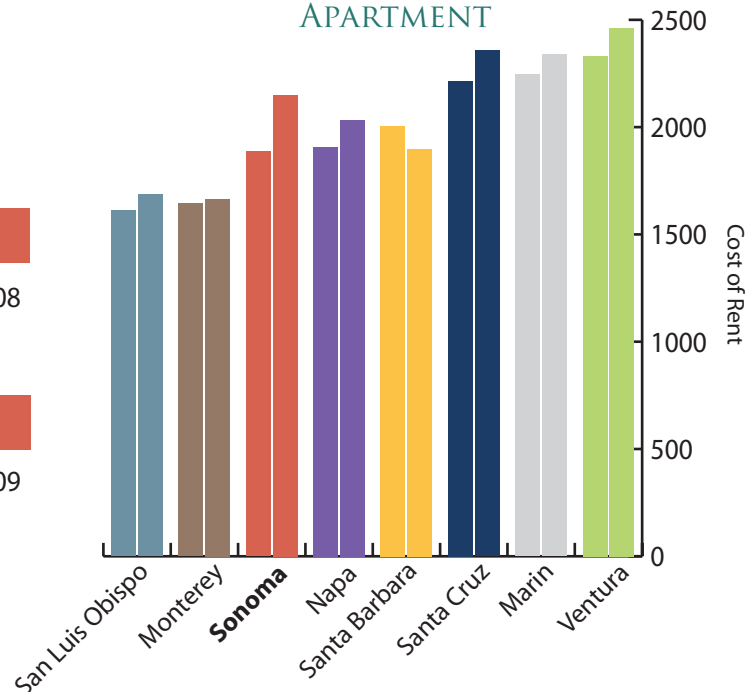
FMR SONOMA COUNTY		
Apartment Size	2008	Proposed 2009
1- Bedroom	\$901	\$1,026
2- Bedroom	\$1,137	\$1,296
3- Bedroom	\$1,613	\$1,839
4- Bedroom	\$1,886	\$2,150

ONE BEDROOM APARTMENT



FAIR MARKET RENT

FOUR BEDROOM APARTMENT



POPULATION CHANGE

What is it?

Population change is the shift resulting from birth, death and migration rates. Domestic migration includes intra- and inter-county movement, whereas foreign migration specifically refers to international migration. Net migration is the movement in and out of a specific area. It allows trend analysis and projections for future demographic changes. Natural increase is the balance between the number of births and deaths.

How is Sonoma County doing?

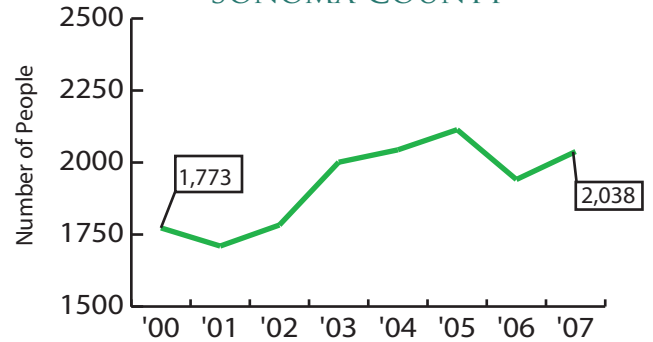
Net migration in Sonoma County has decreased since 2000 and remained negative in 2007. Fluctuations between net domestic migration and net foreign migration have continued since 2002.

While domestic migration has decreased in Sonoma County, foreign migration remains stable, reinforcing the region's attractiveness. Natural increase and the number of births have increased in Sonoma County since 2006.

Why is it important?

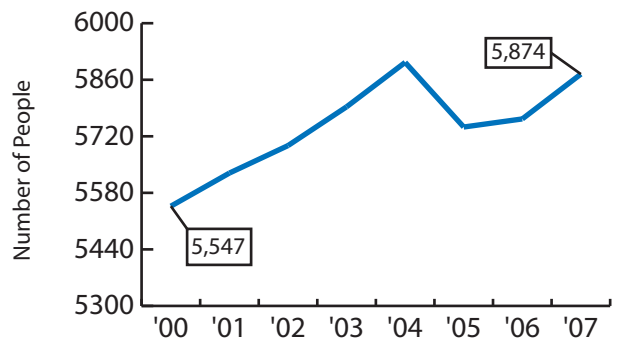
Migration data coupled with number of births and natural increase are all strong indicators of a region's potential to attract and retain a population. While continued migration is important to maintain a healthy, diverse and competitive workforce, it is not an advantage to have extremely high numbers of migrants, which could imply that many people pass through an area quickly.

NATURAL INCREASE IN SONOMA COUNTY



Source: California Department of Finance (www.dof.ca.gov)

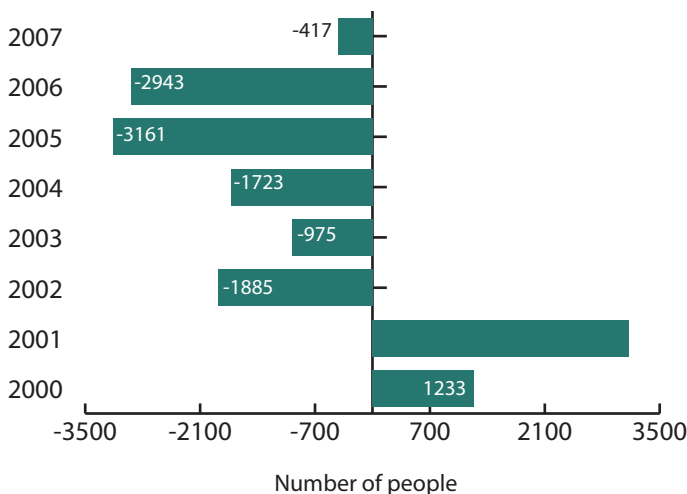
NUMBER OF BIRTHS IN SONOMA COUNTY



PROJECTED INCREASE IN NUMBER OF BIRTHS, 2007-2016

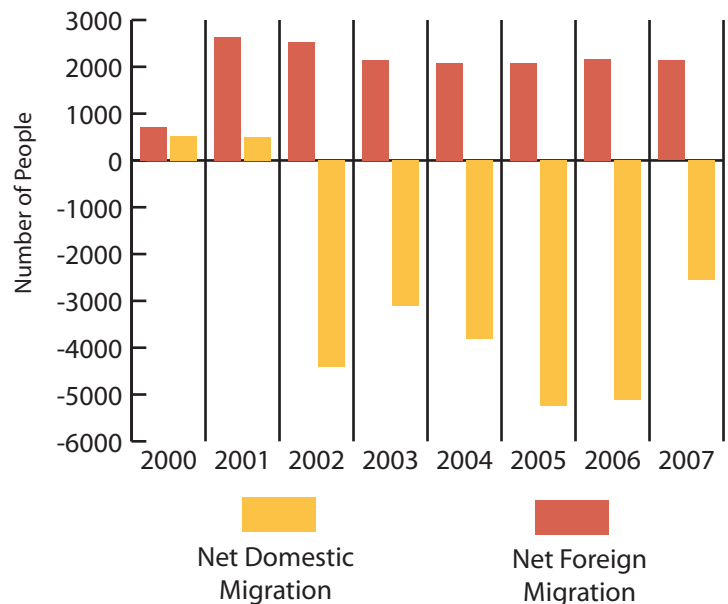
Source: California Department of Finance (www.dof.ca.gov)

NET MIGRATION IN SONOMA COUNTY



Note: based on balance of in-flow and out-flow in Sonoma County
Source: U.S Census Bureau (www.census.gov)

NET FOREIGN AND DOMESTIC MIGRATION, SONOMA COUNTY



Source: U.S Census Bureau (www.census.gov)

NOTE ON DATA SOURCES

The *2009 Sonoma County Indicators* provide a comparative study on various economic, demographic, environmental and social facets of Sonoma County.

Economic Development Board (EDB) research originates only in information available on websites and previously published material and cites respective source data sets. Sonoma County Indicators offer partial and/or composite representations of raw data.

The indicators do not provide complete in-depth analyses of all facets of Sonoma County. The EDB believes all data contained within this report to be accurate and the most current available, but does not guarantee its accuracy or completeness. Use of data from an outside source does not represent an endorsement of any product or service by the EDB, its members or affiliates. The *2009 Sonoma County Indicators* was developed from national and local data sources. Its content is based on models of similar reports from comparable regions around the country, combined with input from various agencies and organizations within the County. The Sonoma County EDB appreciates organizations which have pioneered approaches used in *2009 Sonoma County Indicators* report, and is grateful to those that provided feedback.

Interested readers are invited to suggest indicators for inclusion in future reports and are encouraged to contact data source agencies or organizations for further research. For more information, please visit www.sonomaedb.org, write to edb@sonoma-county.org or fax (707) 565-7231.

The pictures on the front cover of the *2009 Sonoma County Indicators* were selected from the Sonoma County Tourism Bureau database.

INDICATORS TEAM

The *2009 Sonoma County Indicators* report was prepared by the Economic Development Board project coordinators.

K. Min Pease was the project lead, managing and editing the report's overall layout and content, as well as compiling data for the Economy section. Special assistance with economic indicators data was provided by the United States Bureau of Labor Statistics and the Sonoma County Airport.

Mehroz Baig performed research for the Workforce and Society sections, with acknowledgement to the California Department of Education, the California Employment Development Department and the Sonoma County Sheriff's Department for providing data assistance.

James Colbenson compiled information for the Health section, collaborating with Rita Scardashi, Barbara Graves, Lynn Scuri, Mary Maddux and Jenny Mercado of the Sonoma County Health Department.

Jennifer Macy researched the Tourism section, with acknowledgment to the Sonoma County Tourism Bureau and data in the California Travel and Tourism Commission reports published by Dean Runyan and Smith Travel Research.

Eric Paul gathered and analyzed data for the Environment section, with thanks to Carrie Pollard of the Sonoma County Water Agency, Joe Horak of Pacific Gas & Electric, Patrick Carter of the Sonoma County Waste Management Agency and Leticia Rosas of the Agricultural Preservation and Open Space District for their assistance with data.

INDEX METHODOLOGY AND DESIGN

An index is an economic tool. It is useful for making general comparisons across a range of metrics. Indices are created by transforming raw variables (e.g. payroll growth) into unit-free values between 0 and 1. For simplicity, these numbers can be multiplied by ten. These scores reveal how one rates relative to the two extremes for a given variable. The following formula, with x representing the variable to be measured, is used to attain this number.

$$\frac{x - \min(x)}{\max(x) - \min(x)}$$

For example, Santa Cruz experienced the greatest payroll growth over the last year relative to the competing regions and, accordingly, scored a 10. Ventura, on the other hand, had the slowest payroll growth and scored a 0. Sonoma's score of 3.3, therefore, means that Sonoma's payroll growth fell 33% of the way between Ventura and Santa Cruz. After the index scores for each variable were calculated, the relevant scores were averaged to create composite indices. Thus, instead of applying the typical index formula, the average score was scaled as a percentage of the best-performing region.

The index section was designed to evaluate Sonoma County's competitiveness, identify opportunities for improvement and, ultimately, affect change. Indices are imperfect at comparing regions: choosing which metrics to incorporate into the analysis is a subjective exercise and can readily affect the outcome; the valuation of each variable may be different for each person; and many indices, this one included, have a short temporal span and may miss larger trends. All of these issues were taken into consideration and attempts were made to rectify them during the design process.

The metrics were selected after evaluating other indices, namely the Sacramento Regional Research Institutes' Prosperity Index and the San Diego Regional Economic Development Corporations' and SANDAG's Index of Sustainable Competitiveness. Content decisions were based on these models. These sources were chosen due to their ability to provide consistency across comparison counties and were then divided into three categories: economy, equity and environment. Each category was assigned an even weight within its respective composite index. This indexing system, combined with the other indicators, should provide a more comprehensive understanding of trends in Sonoma County.

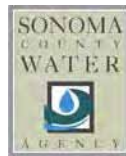
American Public Transportation Association	www.apta.com
California Agricultural Statistics Service	www.nass.usda.gov
California Association of Realtors	www.car.org
California Department of Education	www.cde.ca.gov
California Department of Finance, Demographic Research Unit	www.dof.ca.gov
California Department of Health Services	www.dhs.ca.gov
California Department of Justice	http://ag.ca.gov/cjsc
California Department of Transportation	www.dot.ca.gov
California Division of Travel and Tourism	www.visitcalifornia.com
California Employment Development Department	www.labormarketinfo.edd.ca.gov
California Energy Commission	www.energy.ca.gov
California Integrated Waste Management Board	www.ciwmb.ca.gov
California Secretary of State	www.sos.ca.gov
California State Parks	www.parks.ca.gov
County of Sonoma Department of Transportation and Public Works	www.co.sonoma.ca.us/tpw
Dean Runyan & Associates	www.deanrunyan.com
Division of Tourism, California Trade and Commerce Agency	www.visitcalifornia.com
Environmental Protection Agency	www.epa.gov
Federal Transit Administration	www.ntdprogram.com
Forbes	www.forbes.com
Federal Reserve Bank of Cleveland	www.clevelandfed.org
Medical Board of California	www.medbd.ca.gov
Metropolitan Transportation Commission	www.mtc.ca.gov
National Association of Realtors	www.realtor.org
North Bay Business Journal	www.northbaybusinessjournal.com
Pacific Gas & Electric	www.pge.com
Santa Rosa Junior College	www.santarosa.edu/research
Smith Travel Research	www.smithtravelresearch.com
Sonoma County Agricultural Preservation and Open Space District	www.sonomaopenspace.org
Sonoma County Airport	www.sonomacountyairport.org
Sonoma County Economic Development Board	www.sonoma-county.org/edb
Sonoma County Office of Education	www.scoe.org
Sonoma County Planning and Resource Management Department	www.sonoma-county.org/prmd
Sonoma County Registrar of Voters	www.sonoma-county.org/regvoter
Sonoma County Sheriff's Department	www.sonomasheriff.org
Sonoma County Transportation Authority	www.sctainfo.org/Bike_Main_files/
Sonoma County Transit	www.sctransit.com
Sonoma County Water Agency	www.sonomacountywater.org
Sonoma County Waste Management	www.recyclenow.org
The Press Democrat	www.pressdemocrat.com
UCLA California Health Interview Survey	www.chis.ucla.edu
United States Bureau of the Census, American Community Survey	www.census.gov
United States Bureau of Labor Statistics	www.bls.gov
United States Department of Housing and Urban Development	www.hud.gov

WITH ACKNOWLEDGMENT AND APPRECIATION TO LOCAL KEY BUSINESSES
SUPPORTING SONOMA COUNTY ECONOMIC DEVELOPMENT:

CHAIRMAN'S CIRCLE:



UNDERWRITERS:



■ County of Sonoma General Services, Real Estate Division ■

■ County of Sonoma Board of Supervisors ■