

2016 Sonoma County Indicators



Economy, Environment, Health, Society, Tourism, Workforce

● ABRIDGED EDITION ●



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January, 2016

The Sonoma County Economic Development Board (EDB) is pleased to present the *2016 Sonoma County Indicators Abridged Edition*. The indicators chosen for this year's report focus on the connections between our economy and community, measuring our progress, and benchmarking our performance to similar counties in California. In an effort to provide the most current and comprehensive annual data in this year's report, the scope of this preliminary version has been narrowed. The full unabridged report will be made available online at www.sonomaedb.org in the spring of 2016.

The report features a "competitiveness" section intended to measure regional competitiveness not only with economic elements but through the region's quality of life and cost of doing business.

Some highlights in this report include:

- Sonoma County is a competitive place to do business both because of an attractive business climate as well as the high quality of life, as shown through the high scores on the Quality of Place Index. (pg. 4-5)
- The seasonally unadjusted unemployment rate for Sonoma County was 4.2% in October 2015, below the statewide and national averages. Job growth in Sonoma County was 3.2% from October 2014 to October 2015. (pg. 6)
- Water use in Sonoma County decreased by 14% from 2013 to 2014 and 87% of days in 2015 were classified as "good" air quality with no "unhealthy" air quality days. (pg. 11)
- Tourism indicators are overwhelmingly positive. Revenue from the transient occupancy tax (TOT) reached \$8.44 million in the first quarter of 2015 and Sonoma County has 19,350 jobs generated by destination spending. (pg. 12)

The EDB encourages readers to delve further into these issues by contacting the agencies and organizations listed throughout this report, and by visiting the EDB's website, www.sonomaedb.org. This annual assessment of our region's economic progress is meant to help guide discussions by local business, government, community and education leaders regarding strategies for shaping our region's economic future. The Economic Development Board is committed to working with our partners to take the actions necessary to build on our strengths and to address our deficiencies – to improve economic opportunities and quality of life for all Sonoma County residents.

Pamela Chanter

Pamela Chanter
Chair
Economic Development Board

Ben Stone

Ben Stone
Executive Director
Economic Development Board

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Highlights



40% of the
population
over age 45

Average weekly
wage rose
4% in 2014



3.8% unemployment
September 2015

Increasing health
insurance coverage
across all age groups



\$8.44 million
TOT revenues
Q1 2015

14% water usage
decrease from
2013-2014



Construction jobs
grew 12.8%
in the past year

Office space
111% cheaper
than San Francisco





33% have a Bachelor's Degree or higher

25,800 Businesses in 2015



Education & Health Services employment grew by 36% over the past decade

19,350 jobs generated by Destination Spending



109 Quality of Place Index Score - 2nd among comparable counties

Largest increase in health insurance coverage amongst 18-34 yr olds



86% of days with "good" air quality, no "unhealthy" days

Construction has the largest increase in employment of 15% in the past year



How Competitive is Sonoma County?

Regional competitiveness is the ability of a region to produce goods and services that are successful in the global market. When measuring competitiveness, it is not only important to take into account economic elements, but also ways the region supports continuing innovation and productivity and maintains a high standard of living. We have done this by establishing a competitiveness index which measures innovation and quality of place. There are many indicators that can be used in these indexes, the ones selected were chosen because they effectively measure an innovative environment and a high quality of life.

Quality of Place Index

An area's quality of life is becoming more and more important in an increasingly competitive global economy as a way to attract and retain top talent. This is because highly educated workers have more flexibility in where they choose to live, as their special knowledge and skills are in high demand. As such, an area's lifestyle attributes are crucial to its long-term economic success.

Overall: We examine five measures indicative of quality of place in order to establish how competitive Sonoma County is relative to comparable counties. Sonoma County's above-average ranking is primarily due to good air quality, a low average commute time, and high percentage of high school graduates. These individual measures are summarized below.

Quality of Place Indicators

Air Quality: This is the percentage of days with air quality measured as 'good' by the Environmental Protection Agency. Sonoma County ranked third behind Monterey County and Santa Cruz County with 'good' air quality for 87% of days in 2015.

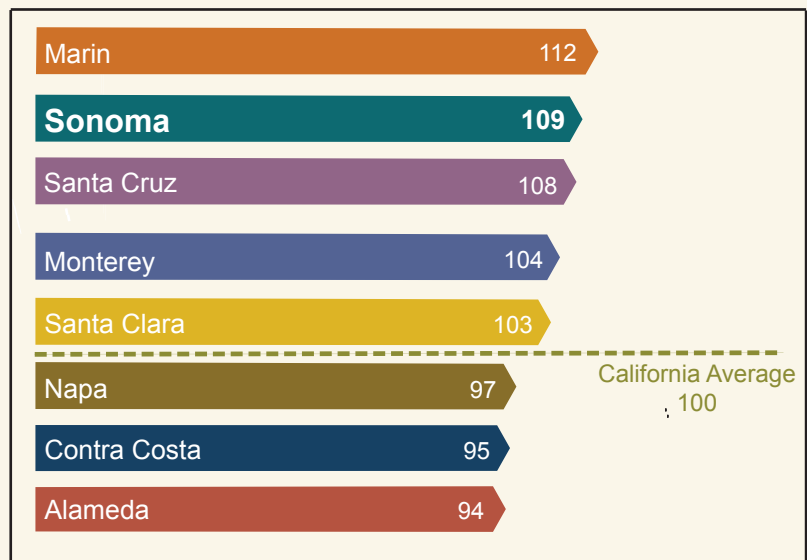
High School Graduates: This indicator represents the percentage of adult population (25+) with a high school diploma or higher. The better educated the regional workforce, the more quickly an economy can take advantage of new opportunities and recover from negative shocks. Sonoma County ranked third among comparable counties with 87.3% of residents obtaining a high school diploma.

Commute Time: The commute time measures the average time spent commuting by county residents. Sonoma County ranked 3rd among comparable counties with an average time of 24.4 minutes.

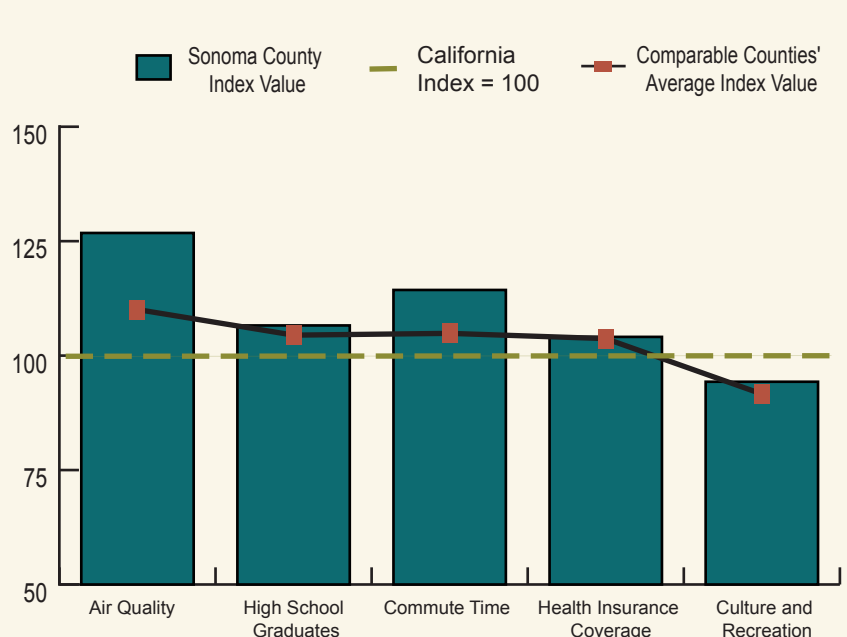
Health Insurance Coverage: The number of individuals with health insurance coverage has seen an increase in recent years. Sonoma County ranked fifth among comparable counties with 84% of residents having health insurance coverage.

Culture and Recreation: Employment in the arts, entertainment and recreation (NAICS 71) per capita provides a measure of an area's cultural and recreational opportunities. Sonoma County ranked third among comparable counties for culture and recreation with an index score of 94.

Quality of Place Index 2015-2016



Indicators for Quality of Place Index
Sonoma County 2015-2016



Source All: Environmental Protection Agency (www.epa.gov), ESRI Business Analyst (bao.arcgis.com), U.S. Census Bureau (www.census.gov), California EDD (edd.ca.gov).

How Competitive is Sonoma County?

Business Attraction: We have developed a “cost of doing business” comparison among Sonoma County, Marin County and San Francisco County. This comparison highlights three factors which have a large impact on the cost of doing business: lease rates, average wages, and tax rates. Lower prices and rates in each of these three categories create a more cost effective and inviting atmosphere for businesses.

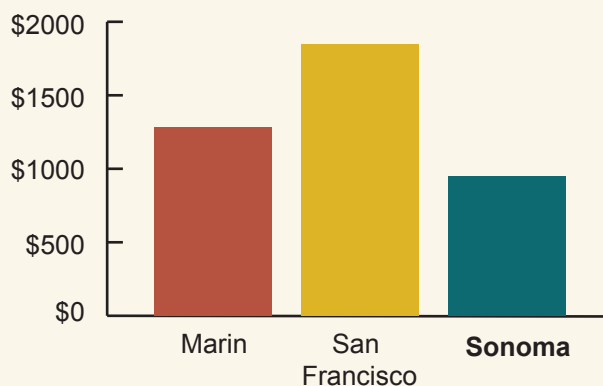
Cost of Doing Business Comparison

Marin County	San Francisco County	Sonoma County
Lease Rates (annual rate)		
<ul style="list-style-type: none"> Office Space: \$28.80 psf Industrial Space: \$19.20 psf 	<ul style="list-style-type: none"> Office Space: \$68.14 psf Industrial Space: \$30.43 psf 	<ul style="list-style-type: none"> Office Space: \$19.62 psf Industrial Space: \$9.24 psf
<small>Sources: Marin and Sonoma County Rates: Keegan and Coppin, (keegancoppin.com) San Francisco Rates: LoopNet, (loopnet.com)</small>		
Average Weekly Wages		
<ul style="list-style-type: none"> \$1,280 per week 	<ul style="list-style-type: none"> \$1,850 per week 	<ul style="list-style-type: none"> \$952 per week
<small>Source: 4th Quarter, 2014, U.S. Bureau of Labor Statistics, (www.bls.gov)</small>		
Tax Rates		
<ul style="list-style-type: none"> Sales Tax: 8.70% Property Tax: 1.05% 	<ul style="list-style-type: none"> Sales Tax: 8.75% Property Tax: 1.12% 	<ul style="list-style-type: none"> Sales Tax: 8.34% Property Tax: 1.04%

Sources: Sales Tax: Average of Rates for Individual Cities Within Each County: (www.california-sales-tax-rate.insidegov.com)
Property Tax: Effective Rate with Low Bond Indebtedness: (www.BeSmartee.com)

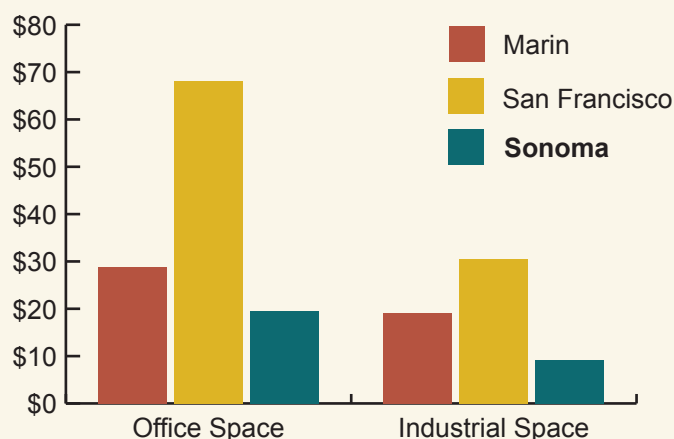
Sonoma County has lower commercial property lease rates, average weekly wages, as well as sales and property tax rates, therefore lowering the cost of doing business compared to Marin and San Francisco Counties. This low cost of doing business combined with a high quality of place index score puts Sonoma County in a good position to attract new and existing business ventures. **An average 20-employee company will save \$370,000 to \$500,000 annually in payroll and rent expenditures in Sonoma County compared to Marin and San Francisco.**

Average Weekly Wages, Q4, 2014



Source: 4th Quarter, 2014, U.S. Bureau of Labor Statistics, (www.bls.gov)

Annual Lease Rates, 2015



Sources: Sonoma and Marin: Keegan and Coppin, San Francisco: LoopNet

Economy

Economy indicators include employment levels, median home prices, income and poverty measures. In addition to representing the type and level of economic activity in the county; economic indicators illustrate strengths, challenges, and changes within Sonoma County relative to comparable counties.

Unemployment Rate

The unemployment rate measures the percentage of individuals who are not working but are able, available, and actively seeking work, relative to the entire workforce. The seasonally unadjusted unemployment rate in October 2015 was 4.2% for Sonoma County; which is lower than the state average (5.7%), the U.S. National average (4.8%), and the third lowest among comparable counties.

Median Home Prices

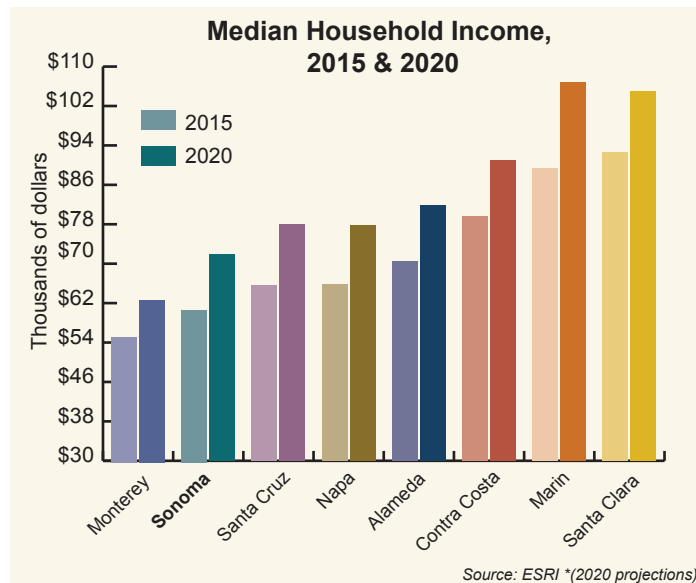
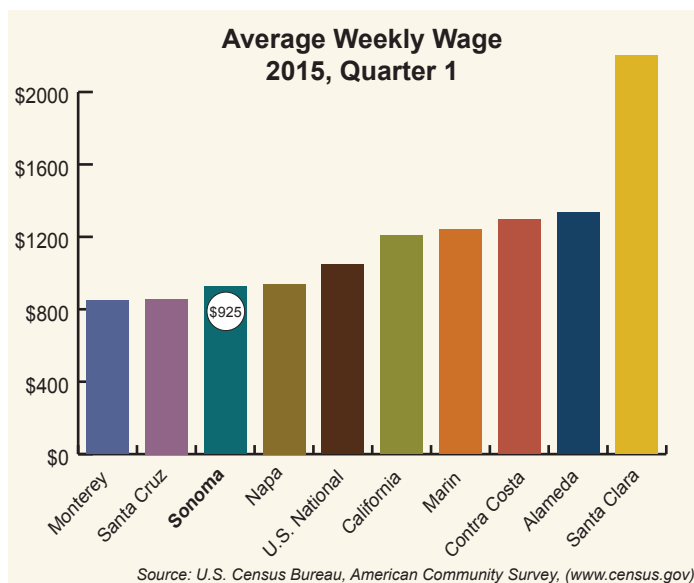
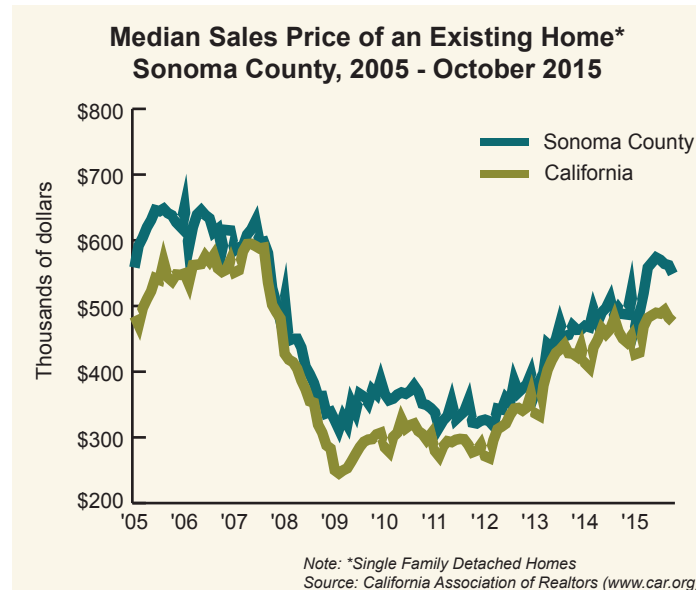
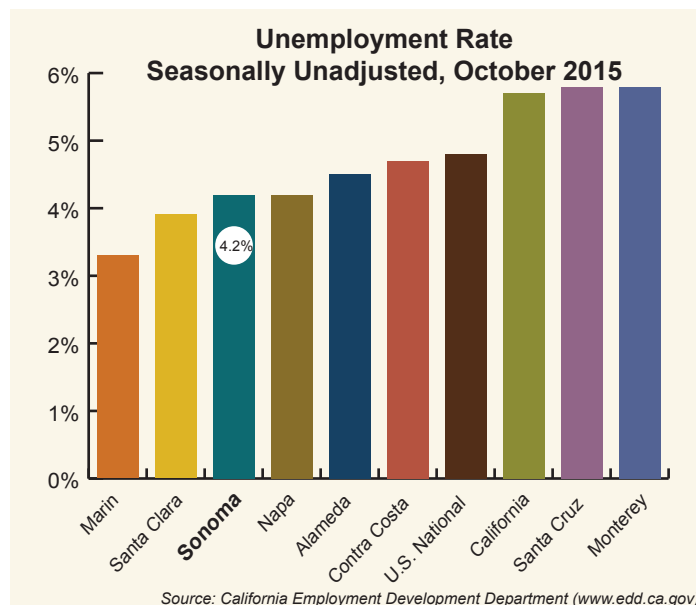
In October 2015, the median sales price of an existing single family detached home in Sonoma County was \$548,840. This is \$72,850 more than California's median sales price of \$475,990 but \$241,740 cheaper than the median sales price of the San Francisco Bay area. Overall, home prices have been rising and are nearing their 2006 peak.

Median Household Income

Median household income measures the level of each county's middle earning households. From 2015 to 2020, the median household income in Sonoma County is projected to rise from \$61,020 to \$71,950. Sonoma County's median household income places lower than some comparable counties.

Average Weekly Wage

Sonoma County's average weekly wage was \$925 in the 1st quarter of 2015, a 6% increase from the 1st quarter of 2014. This 6% increase in wages places Sonoma County 13th out of the largest 343 counties in the United States and in the 95th percentile for wage growth. Sonoma County's average weekly wage ranks slightly lower than the U.S. National weekly wage of \$1,048, and is lower than some comparable counties.



Industry Employment

Employment increased in all industries except for Manufacturing in Sonoma County from August 2014 to August 2015. Construction posted the highest gains with 12.8% growth over the year, followed by gains in Government & Public Education (4.4%), Educational and Health Services (3.8%), and Retail Trade (2.1%). Overall Sonoma County added 3,400 jobs from August 2014 to August 2015.

Job Growth

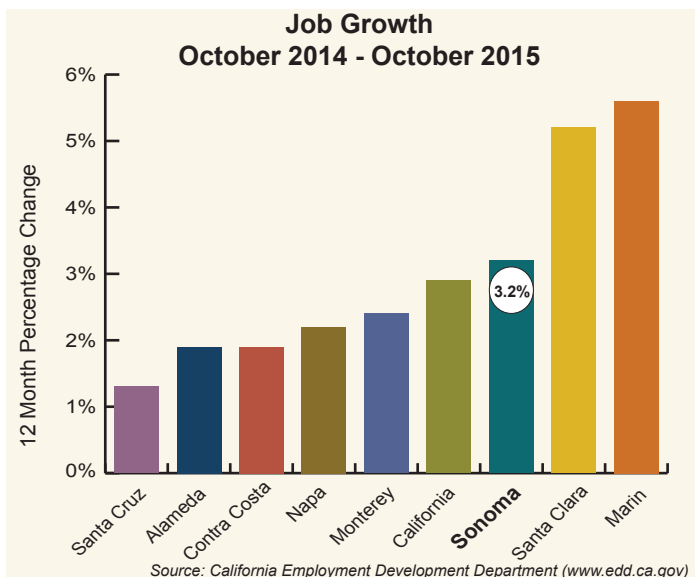
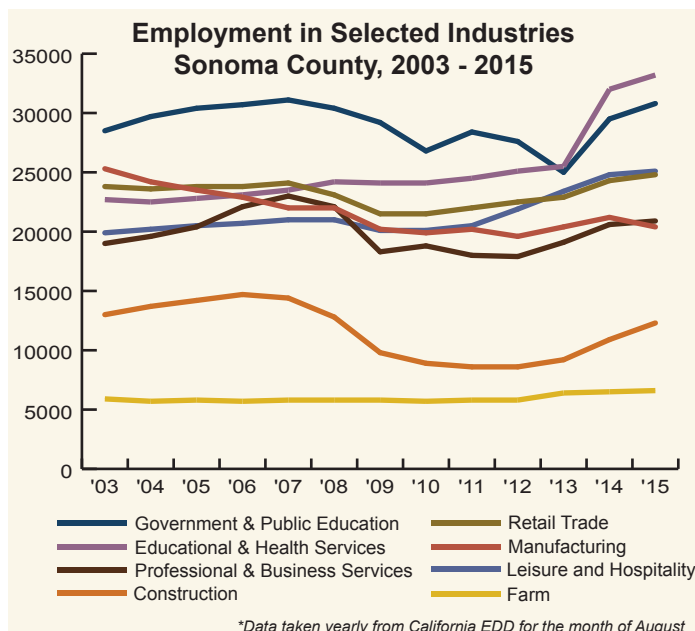
Sonoma County ranked 3rd among comparable counties in job growth from October 2014 to October 2015. Total employment increased by 3.2% for Sonoma County. Over the next years, the county will continue to build momentum through its construction, tourism, and technology industries.

Business Establishments

In 2015, within Sonoma County's population of 494,431, there were 25,800 reported business establishments. According to the Environmental Systems Research Institute (ESRI) projections, the 2015 employee to residential population ratio was 0.45:1, similar to Santa Clara's which was 0.51:1. Therefore, much of the difference in the number of business establishments and employees between comparable counties can be attributed to differing population sizes.

Top Private Employers

According to the North Bay Business Journal, the top private employer in Sonoma County was Kaiser Permanente in Santa Rosa with 2,555 employees. The Graton Resort and Casino was the second largest employer with 2,000 employees, followed by Sutter Santa Rosa Regional Hospital with 1,797 employees.

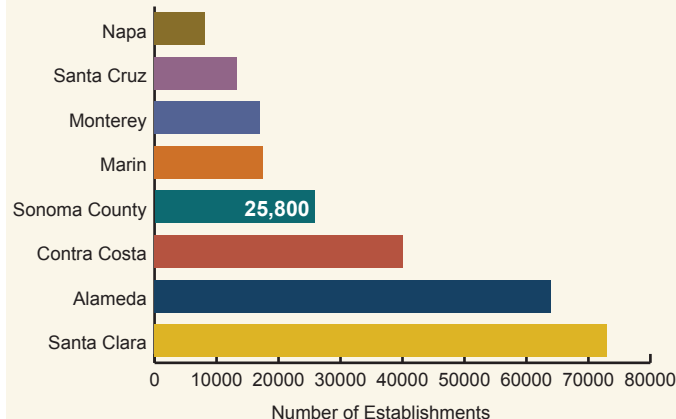


Sonoma County Top Private Employers 2014-15

	Company	# employees
1	Kaiser Permanente	2,555
2	Graton Resort and Casino	2,000
3	Sutter Santa Rosa Regional Hospital	1,797
4	St. Joseph Health System	1,740
5	Keysight Technologies	1,200
6	Amy's Kitchen	870
7	Medtronic CardioVascular	840
8	Jackson Family Wines	640
9	AT&T	600
10	Hansel Auto Group	570

Source: North Bay Business Journal

Total Business Establishments 2015



Source: ESRI (www.bao.arcgis.com)

Society

Society indicators include education levels, demographic trends and crime rates. These indicators illustrate relative performance in quality of education, safety and demographic trends.

Current and Projected Age Distribution

Current and Projected Age Distribution represents Sonoma County's population by age group. The data shows that over 40 percent of the population was above the age of 45 in 2015. Conversely, about 30 percent of the population was below 25 years of age. By 2020, Sonoma County is projected to undergo a moderate demographic shift, with more people than before entering the 65 and above age group.

Ethnic Distribution

Ethnic distribution shows the demographic composition of Sonoma County in 2015. Latinos comprise the largest minority group (26.7%) after a predominantly white population (75.3%). African Americans represent approximately 2% of Sonoma County's population, while Asians comprise 4%, and Native American Indians compromise 1.3%.

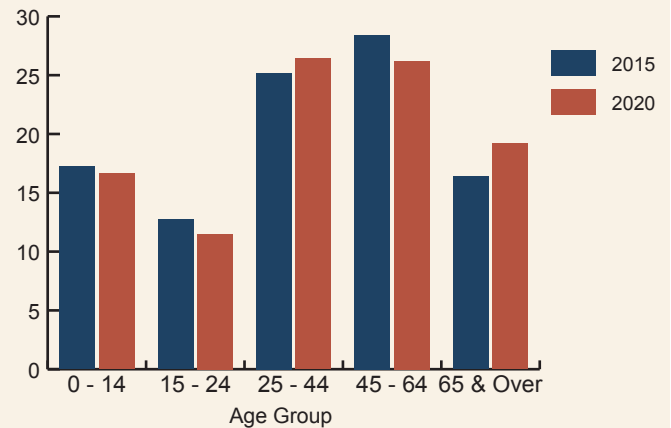
California High School Exit Exam (CAHSEE) Pass Rates by Ethnicity

Each year, sophomores at California public high schools are required to take the CAHSEE, which measures English/Language Arts and math ability. Students must pass this test to graduate from a public institution. The data suggests pass rates have remained relatively unchanged for all ethnicities during the past school year.

Educational Attainment by County

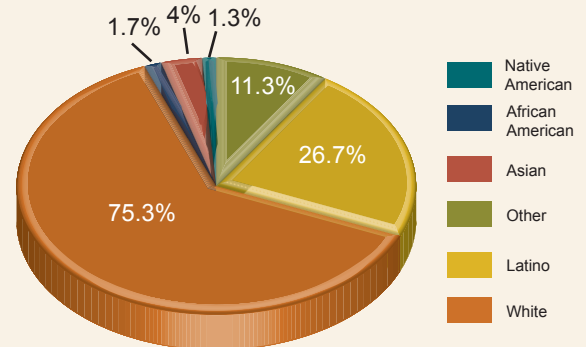
Educational Attainment indicates the percentage of the population who have earned a high school diploma, bachelor's degree or advanced degree. Sonoma County ranks slightly better than the state average, with 33% of the population holding at least a bachelor's degree, compared to California's average of 31%.

**Current and Projected Age Distribution
Sonoma County, 2015 - 2020**



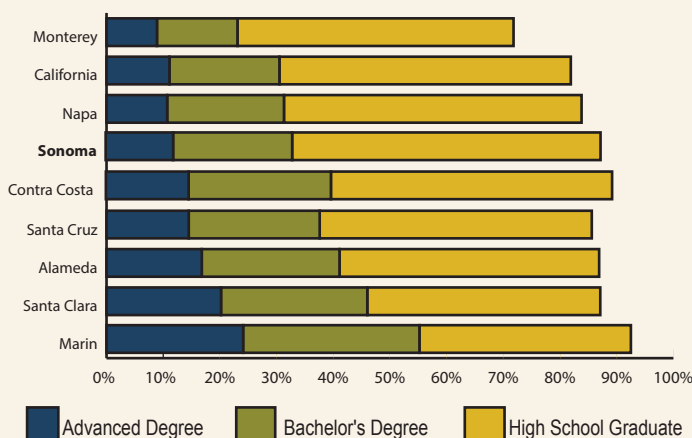
Source: U.S. Census, ESRI Forecasts for 2015 and 2020

**Ethnic Distribution
Sonoma County, 2015***



*Statistical information for some ethnicities is unavailable due to insufficient sample size
Source: U.S. Census, ESRI Forecasts for 2015

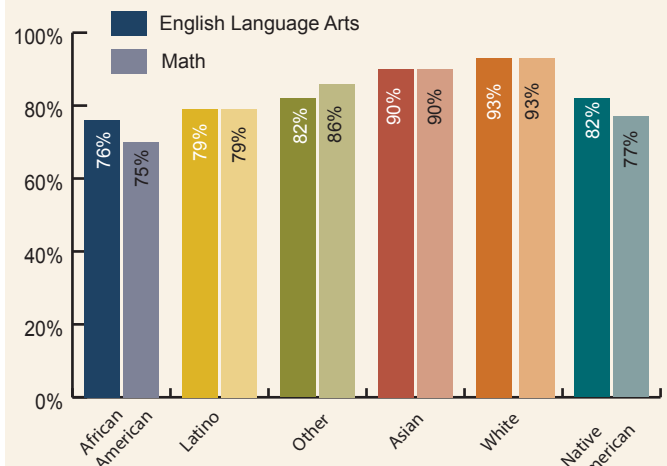
Educational Attainment by County, 2015



Note: High School Degree includes Associates Degree and some college, no degree, population 25 years and older

Source: U.S. Census, ESRI Forecasts for 2015

**CAHSEE Pass Rates by Ethnicity
Sonoma County, 2014-2015 School Year**



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

Workforce indicators provide information on employment growth, work status, and earnings in Sonoma County. These indicators illustrate opportunities and challenges for the county's workforce.

Cluster Employment Growth

Education & Health Services had strong employment gains by 36% over the past decade, driven by Health Care & Social Assistance that contributed 8600 additional jobs, with 700 jobs last year alone. Other leading industries include Leisure & Hospitality, indicative of a vibrant tourism sector, and Government, mainly due to Special Districts plus Indian Tribes, which includes casinos and has more than doubled employment since 2013. Construction has accelerated in recent years and experienced the fastest industry employment growth in the past year of 15% or 1600 jobs.

Unemployment Rate

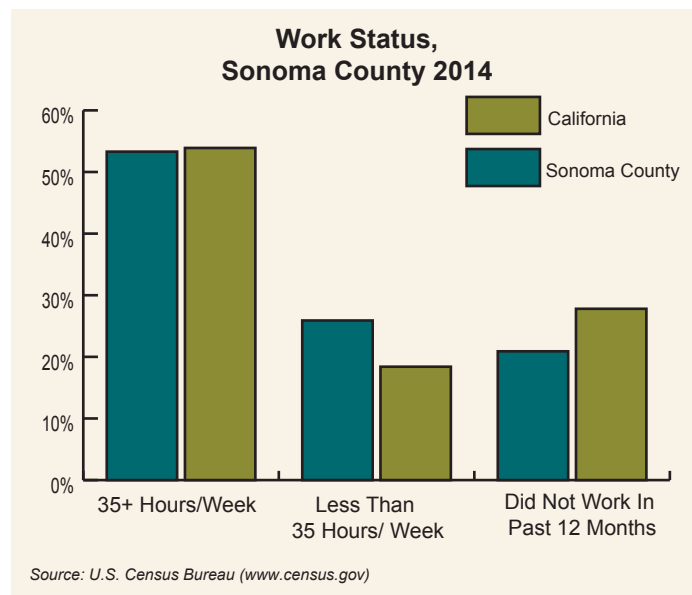
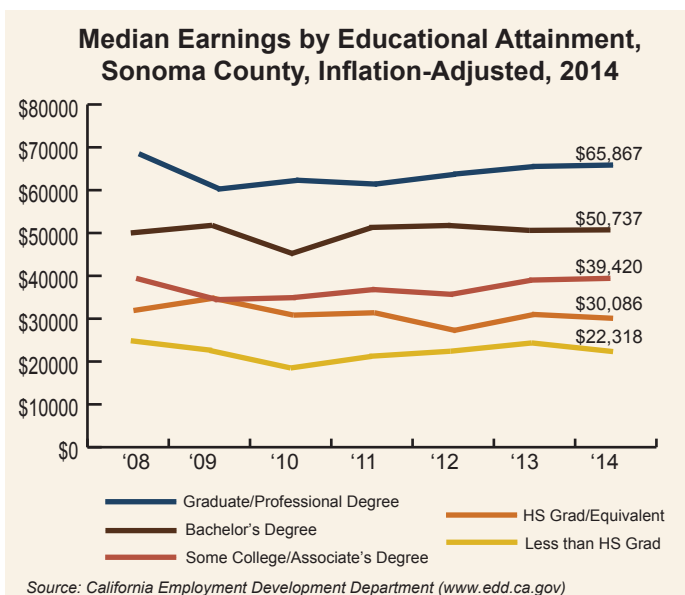
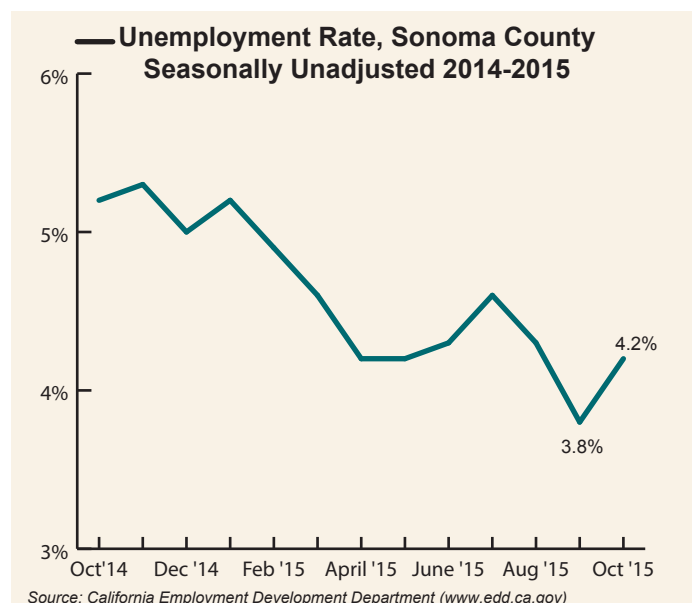
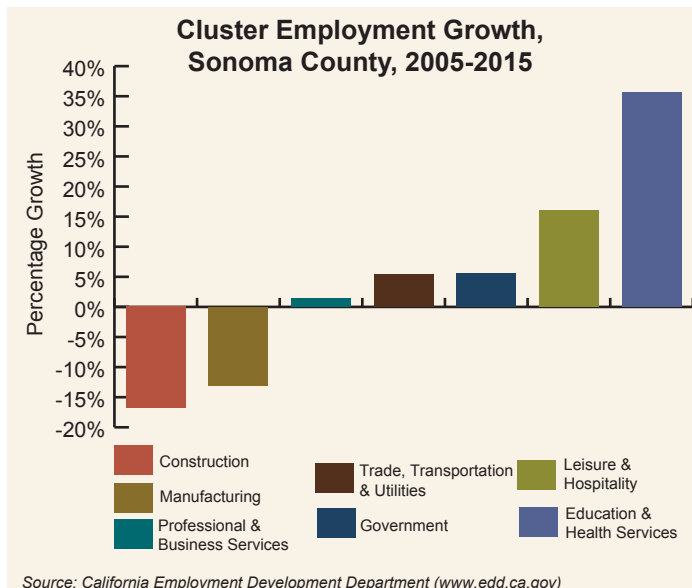
An expanding workforce and a steady decline in unemployment are positive signs of a sustainable economic recovery taking hold in Sonoma County. The September 2015 unemployment rate marked an 8 year low of 3.8%, 1.3% lower than the previous year and the lowest it has been since 2007. Workforce continues to grow steadily to 262,600 in October 2015.

Work Status

53% of Sonoma County's labor force worked 35 hours or more per week and 26% worked less than 35 hours per week in 2014, an improvement from the previous year. The local population that did not work decreased to 21% correspondingly, compared to 28% in California.

Median Earnings by Educational Attainment

College graduates saw modest increases in earnings for 2014 while less than HS and HS Grad/Equivalent earnings continue a slight downward trend. Median earnings for Graduate/Professional Degree holders were recorded at \$65,867, returning to pre-recession levels and much above 2007 earnings of \$61,579. As expected, higher education results in higher median earnings, with local college graduates making 69% more on average than a typical high school graduate.



Health

Health indicators provide information on health care, mortality rates, birth rates, and obesity in Sonoma County. These statistics offer a glimpse into the health and wellness of the county, particularly in comparison to California.

People Without Health Insurance

Within this cluster comparison, uninsured rates have continued to drop over the year with a 3.7% increase in insured individuals in Sonoma County. In 2014, 10% of the individuals living in Sonoma County were uninsured. Sonoma County continues to have a lower percentage of uninsured individuals than California and the United States.

Leading Causes of Death

Malignant Neoplasms (Cancer) and Diseases of Heart accounted for almost half of all deaths in Sonoma County in 2013. Over the year, the percentage of Heart Disease related deaths increased by nearly 6%.

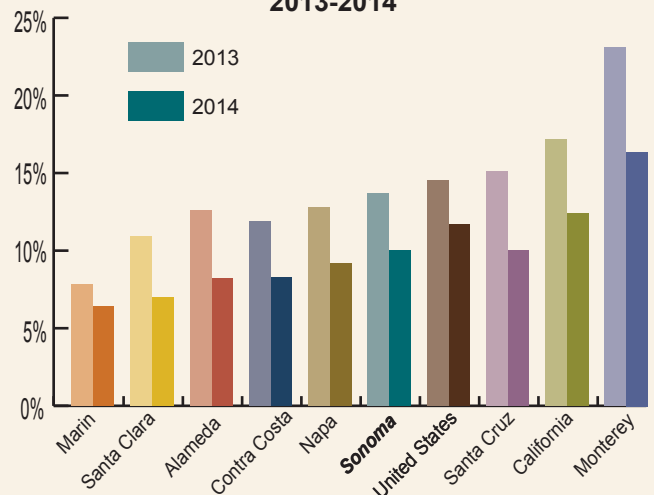
Types of Insurance Coverage

Sonoma County continues to experience an increase in individuals who have private and public health insurance in 2014. The percentage of the population who have private health insurance rose to 71%, almost 10% more than the state level of 62%. Meanwhile, individuals with public health insurance increased slightly to 33%. Sonoma County has seen decreasing levels of uninsured individuals for the past 3 years.

People With Health Insurance, by Age

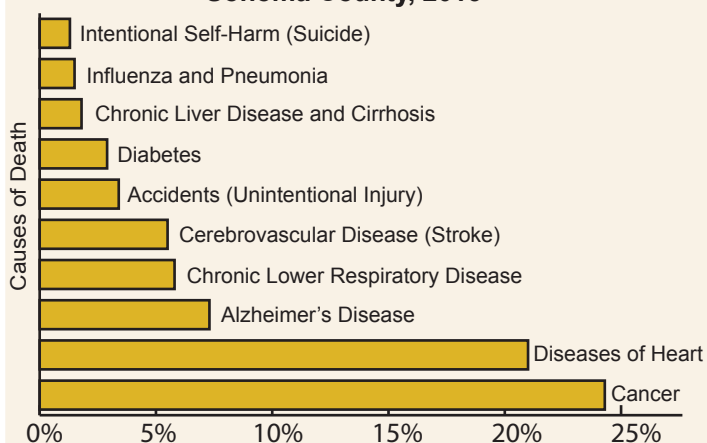
With the exception of the 65 and above age group, which remained consistent at around 99% complete coverage, health insurance coverage has improved across all age groups. It has notably increased amongst the population of individuals between the ages of 18 to 34 by more than 9% since 2011.

People Without Health Insurance, 2013-2014



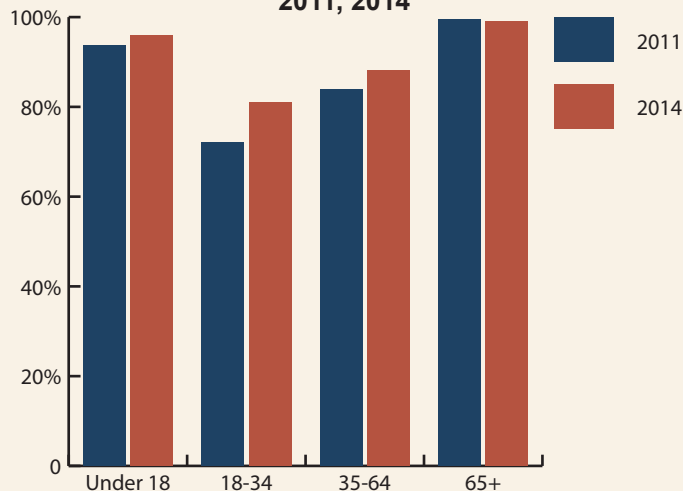
Source: 2014 American Community Survey (www.census.gov)

Leading Causes of Death Sonoma County, 2013



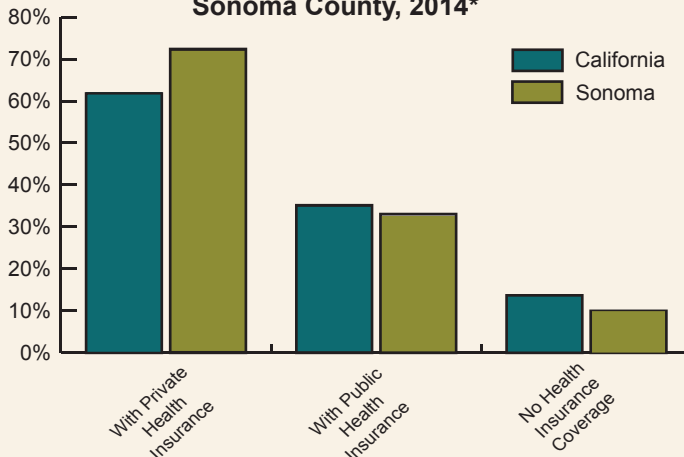
Source: California Department of Public Health (www.cdph.ca.gov)

People With Health Insurance, by Age 2011, 2014



Source: 2011, 2014 American Community Survey (www.census.gov)

Types of Health Insurance Coverage in Sonoma County, 2014*



*Individuals may have both private and public health insurance
Source: 2014 American Community Survey (www.census.gov)

Environmental indicators gauge relative environmental performance for Sonoma County.

Air Quality

Sonoma County is split between two air districts; The Northern Sonoma County Air Pollution Control District, and the Bay Area Air Quality Management District. The Northern Sonoma County Air Pollution Control District, which includes northern Sonoma County, meets all federal and state requirements for air quality. The southern portion of Sonoma County is located within the San Francisco Bay Area Air Basin, which spans nine counties. The Bay Area Air Quality Management District is marginally in non-attainment for state ozone standards and moderately in non-attainment for state particulate matter (PM 2.5) standards. Non-attainment status in southern Sonoma County can be attributed in part to the high air pollution potential due to the prevailing winds of the Sonoma Valley, which trap and concentrate pollutants.

Despite non-attainment status in the Sonoma County portion of the Bay Area Air Quality Management District, that portion of Sonoma County saw 87% of the days so far in 2015 where the air quality in Sonoma County was classified as "good," with no days considered 'unhealthy,' even for sensitive groups.

Waste Disposal

Sonoma County is performing well in limiting daily waste disposal per person, and has decreased the amount of waste disposal per capita from 4.1 lbs per person per day in 2010 to 3.6 lbs in 2014. Organic waste disposal decreased over the last year, but plastic waste increased. This increase can be attributed to improvements in the economy that have resulted in increased consumption.

Total Water Use

Water usage for Sonoma County Water Agency service areas has seen a 14% decrease in per capita water usage between 2013 and 2014, falling from 128 to 110 gallons per capita per day. Reductions in water use are due to county water users responding to the historic California drought.

Protected Lands

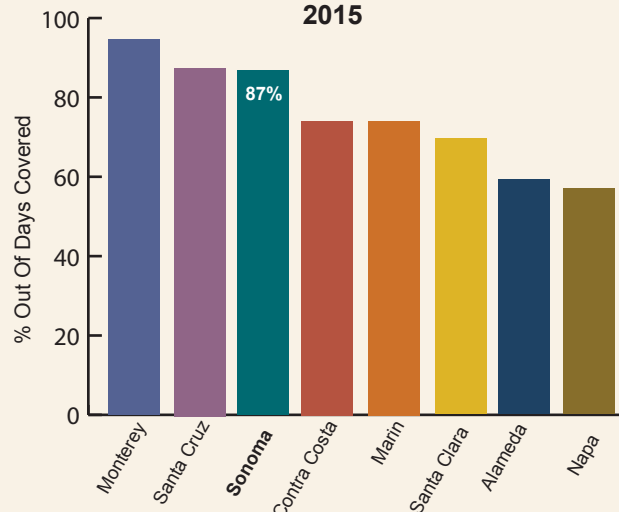
As of 2014, Sonoma County has protected 218,094 acres, a 68% increase from 2002. These lands were preserved in order to provide public recreation, protect natural resources, maintain water supplies, interpret historic sites and preserve Sonoma County's world-renowned landscape. Protected lands offer significant benefits to the local economy through tourism, agriculture, outdoor recreation and other land-based services. In addition, parks and open space are a major contributor to the county's quality of life and a key factor in economic development campaigns, public health indicators, and other business outreach.

Sonoma County

Year	Protected Acres
2002	129,689
2008	151,532
2014	218,094

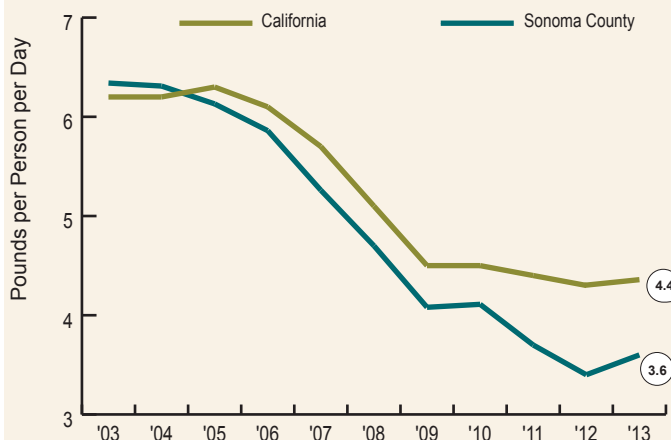
Source: Bay Area Open Space Council, Bay Area Protected Lands 2015 Edition

Days with Air Quality Classified as "Good" 2015



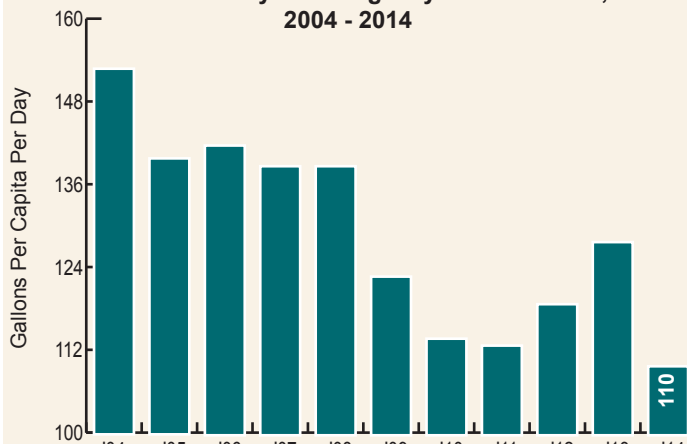
Source: Environmental Protection Agency (www.epa.gov) Air Quality Index Report

Waste Disposal Per Capita, 2003 - 2013



Source: Department of Resources Recycling and Recovery (www.calrecycle.ca.gov)

Total Water Use in Gallons Per Capita Per Day (GPCD) Sonoma County Water Agency Service Areas, 2004 - 2014



Note: Graph displays Sonoma County Water Agency Service Areas; private wells not included.
Source: Sonoma County Water Agency (www.sonomacountywater.org)

Tourism

Tourism indicators measure the economic impact of visitors to Sonoma County. Visitor spending generates tax revenue and supports the local tourism industry workforce. Key indicators have shown sector growth, with some returning to their pre-recession levels.

Employment

Employment generated by destination spending is consistently higher for Sonoma County when compared to Napa and Marin counties. Destination spending in Sonoma County generated 19,350 jobs in 2014.

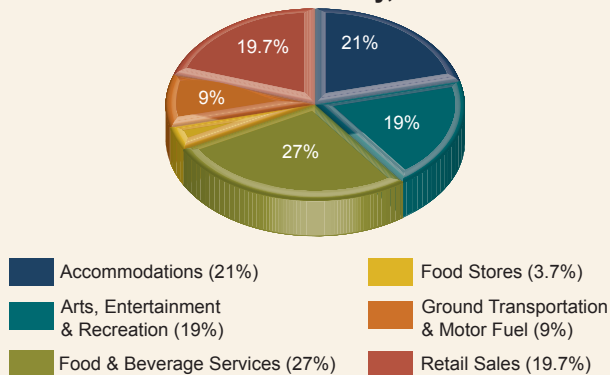
Transient Occupancy Tax

The Transient Occupancy Tax (TOT) is a local tax levied on lodging property room revenues, and is an indicator of the condition and trends of the tourism and lodging industries. TOT revenues have increased to \$8.44 million in Q1 2015 from \$7.24 million in Q1 of 2014. These figures are seasonally adjusted.

Visitor Spending

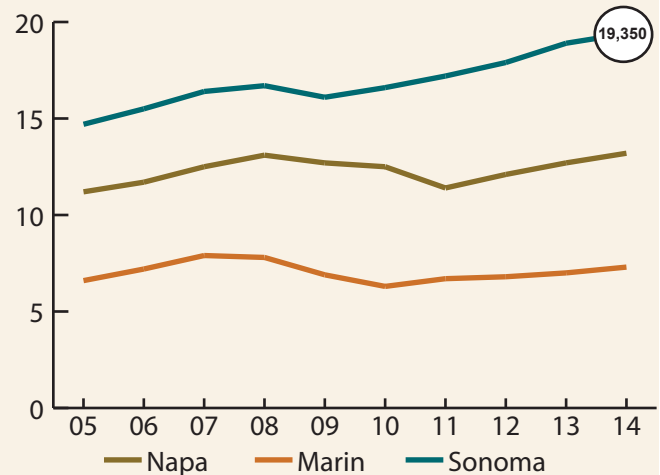
Visitor spending measures the amount of money tourists spend and what they spend it on when they visit Sonoma County. Total visitor spending increased 2.4% between 2013 and 2014. The largest share of visitor spending went towards food and beverage services (27%).

Distribution of Visitor Spending by Purchased Commodity Sonoma County, 2014



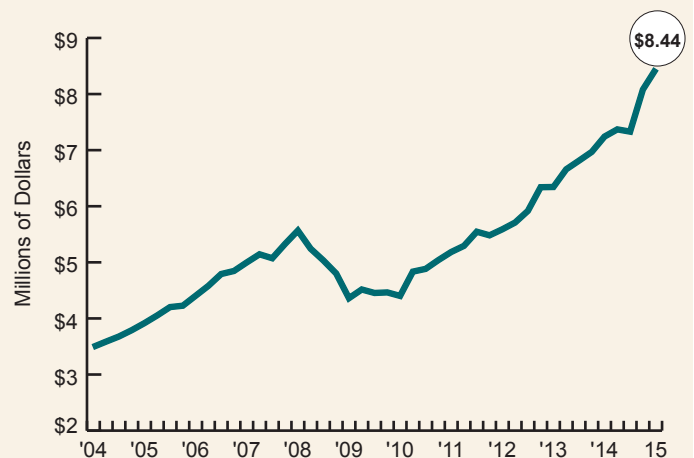
Source: California Travel Impacts by County, California Travel and Tourism Commission, 2015

Employment Generated by Destination Spending, 2005-2014 (Thousands)



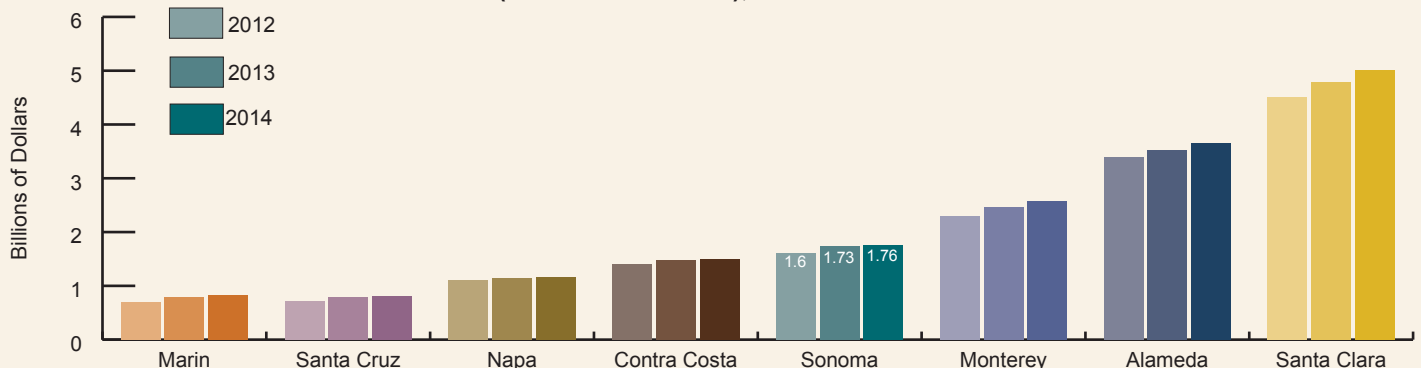
Source: California Travel Impacts by County, California Travel and Tourism Commission, 2015

Transient Occupancy Tax Revenues Sonoma County, 2004 - Q1 2015 (Millions of Dollars, Seasonally Adjusted)



Source: Transient Occupancy Tax Report, Q1 2015. Prepared by the Sonoma County Economic Development Board, August 2015 (www.sonomaedb.org)

Total Direct Travel Spending by County, (Billions of Dollars), 2012 - 2014



Source: California Travel Impacts by County, 2014. Prepared for the California Travel and Tourism Commission by Dean Runyan and Associates, April 2015

Methodology, Sources, and Notes

Note on Data Sources

The *2016 Sonoma County Indicators* provides a comparative study on various economic, demographic, environmental, and social aspects of Sonoma County. Economic Development Board (EDB) research originates from information available from outside resources and previously published material. The *2016 Sonoma County Indicators* offer partial or composite representations of raw data and cite respective source data sets. For more information, please see the listed sources.

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 *2016 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 that have pioneered approaches used in the *2016 Sonoma County Indicators* report and is grateful to those who provided feedback.

Interested readers are encouraged to contact data source agencies or organizations for further research or visit our website www.sonomaedb.org for the unabridged version of *Indicators* released in Spring 2016. Readers are also invited to suggest indicators for future reports by calling (707) 565-7170 or e-mailing edb@sonoma-county.org.

Sources

Bay Area Open Space Council
Bay Area Real Estate Information Services, Inc.
BeSmartee.com
California Association of Realtors
California Department of Education
California Department of Finance
California Department of Public Health
California Department of Health Services
California Department of Justice
California Department of Resources Recycling Recovery
California Employment Development Department
California Postsecondary Education Commission
California Travel & Tourism Commission
Dean Runyan & Associates
ESRI Business Analyst Online
Keegan and Coppin, Inc.
LoopNet
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North Bay Business Journal
Smith Travel Research
Sonoma County Water Agency
United States Bureau of the Census
United States Bureau of Labor Statistics
United States Environmental Protection Agency

Index Methodology

An index is an economic tool that is used to make general comparisons across a range of metrics.

For the quality of place index, the California average for each indicator was scaled to 100 with the rest of the county scores scaled by the same multiplier, allowing for equal comparison between counties. The total index figure was calculated by averaging, with equal weight, each indicator in the index.

Indicators Team

The *2016 Sonoma County Indicators* was prepared by the Economic Development Board project coordinators.

Brian Marland was the project lead, managed and edited the report's overall layout and content. He specifically gathered data and prepared the Highlights, Competitiveness, and Economy sections.

Josue Rivera researched and prepared the Tourism and Society sections.

Amelia Yim gathered data and prepared the Highlights, Workforce, and Health sections.

Alex Avard researched and prepared the Environment section.

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