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EXECUTIVE SUMMARY

Highlights from this year’s report include:

• Between 2010 and 2018, Santa Rosa’s population sees the slowest annual average growth rate at 0.29%, increasing to 179,214 residents. The median age of the city is 38.1 years old.
• Santa Rosa’s 2018 annual average unemployment rate was 2.83%.
• Santa Rosa’s 2018 median household income was $62,620 and is projected to grow by 22% by 2023.
• Housing vacancy rates in Santa Rosa reached a new low in 2017 at 4%.

A Note from Our Executive Director

The Sonoma County Economic Development Board (EDB)—in partnership with the Sonoma County Workforce Investment Board (WIB), the City of Santa Rosa, and the Santa Rosa Chamber of Commerce—is pleased to present the 2019 Santa Rosa City Profile and Projections Report. The EDB publishes a comprehensive annual report on each of the county’s nine incorporated cities—Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, and Windsor. These reports provide projections and forecasts for the demographic, economic, income, and housing data for each city, and showcase some of their unique qualities and local cultures.

This report is meant to reflect conditions in the city with the most recent information available in 2019. While every effort was made to ensure this report contained up-to-date information, certain data was unavailable at the time this report was released; thus, some figures may reflect information from prior years.

Thank you for your interest in the Economic Development Board’s research. For access to each of the City Profile and Projections Reports, or for general questions, concerns, and comments, please reach out to us at (707) 565-7170 or visit www.sonomaedb.org.

Sheba Person-Whitley
Executive Director
DEMOGRAPHICS

POPULATION
At 179,214 residents, Santa Rosa’s 2018 population ranked as Sonoma County’s largest city. The city grew by 2.3% between 2010 and 2018 - averaging nearly 0.3% annually, slowest in the County. Consistent with countywide trends, Santa Rosa’s growth is expected to decline, and estimates show the population declining to 176,700 by 2023.

RACE AND ETHNICITY
In 2018, the White population comprised 69% of Santa Rosa—of which 55% identify as non-Hispanic White. Meanwhile, Hispanics/Latinos (identifying as any race) comprised 32% of Santa Rosa residents. The third most prominent ethnic group at 15% identified as “Some Other Race” alone. Following countywide trends, 2023 forecasts project a declining white population and a growing Hispanic population.
**DEMOGRAPHICS**

**MEDIAN AGE**

Santa Rosa’s 2018 median age decreased to 38.1 years, down 0.2 years from 2017. Santa Rosa’s median age ranked fourth-youngest among Sonoma County cities, below Sonoma County (41), but above California (36) and the U.S. (38). Forecasts project Santa Rosa’s median age to grow to 39.1 by 2023.

**AGE STRUCTURE**

Santa Rosa’s age distribution contained a greater proportion of children below 15 and young professionals aged between 25 and 44, and a lower proportion of adults aged 45+ with exception to those above 84. Forecasts project declines in all age cohorts younger than 65, especially among Youth and Early-Career aged people. The 65+ age bracket grew by 3.5% between 2010 and 2018, and is expected to grow by another 2.2% to a total proportion of nearly 20% by 2023.
**UNEMPLOYMENT**

Third highest among Sonoma County cities, Santa Rosa’s 2.83% annual average unemployment rate measured above Sonoma County (2.7%), but well below California (4.2%), the U.S. (3.7%). Consistent with countywide trends, Santa Rosa experienced a general decline in unemployment over the last two years—contracting by 0.6% since 2017.

**LABOR FORCE**

Santa Rosa’s 53% labor force participation rate remained higher than the county and California. The labor force participation rate is calculated by dividing the number of people working or looking for work, by the total population. Stay-at-home parents, students not looking for work, retirees, and discouraged workers, are not included in the labor force. A low unemployment rate paired with a relatively high labor force participation rate indicates a working-age population.

**NET COMMUTERS**

In 2018, Santa Rosa accommodated 105,159 jobs and 109,520 resident workers, suggesting that 4,359 workers commuted out of Santa Rosa for their work.

**INDUSTRY**

Breaking down employment by industry, Health care and social assistance employed 17% of Santa Rosa residents. Retail trade employed another 14%. Government employed 14%, hospitality and construction employed an additional 8% each. Professional services, administrative services, waste management, manufacturing, and other service occupations employed the remaining 39%.

---

**Unemployment Rate**

<table>
<thead>
<tr>
<th>City</th>
<th>Unemployment Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloverdale</td>
<td>4%</td>
</tr>
<tr>
<td>Healdsburg</td>
<td>4%</td>
</tr>
<tr>
<td>Petaluma</td>
<td>4%</td>
</tr>
<tr>
<td>Cotati</td>
<td>4%</td>
</tr>
<tr>
<td>Rohnert Park</td>
<td>4%</td>
</tr>
<tr>
<td>Windsor</td>
<td>4%</td>
</tr>
<tr>
<td>Sonoma County</td>
<td>4%</td>
</tr>
<tr>
<td>Santa Rosa</td>
<td>4%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>4%</td>
</tr>
<tr>
<td>Sebastopol</td>
<td>4%</td>
</tr>
<tr>
<td>California</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

**Labor Force Participation Rate**

<table>
<thead>
<tr>
<th>City</th>
<th>Labor Force Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cotati</td>
<td>56%</td>
</tr>
<tr>
<td>Petaluma</td>
<td>56%</td>
</tr>
<tr>
<td>Rohnert Park</td>
<td>52%</td>
</tr>
<tr>
<td>Santa Rosa</td>
<td>52%</td>
</tr>
<tr>
<td>Sonoma County</td>
<td>52%</td>
</tr>
<tr>
<td>Sebastopol</td>
<td>52%</td>
</tr>
<tr>
<td>Windsor</td>
<td>52%</td>
</tr>
<tr>
<td>Healdsburg</td>
<td>52%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>52%</td>
</tr>
<tr>
<td>Cloverdale</td>
<td>52%</td>
</tr>
<tr>
<td>California</td>
<td>52%</td>
</tr>
</tbody>
</table>

Source: California Employment Development Department, U.S. Census Bureau

**Employed Population 16+ by Industry**

- Health Care and Social Assistance: 3%
- Retail Trade: 17%
- Government: 14%
- Accommodation and Food: 14%
- Construction: 8%
- Professional, Scientific + Technical: 6%
- Administrative, Support + Waste Management: 6%
- Other Services: 5%
- Manufacturing: 5%
- Finance and Insurance: 3%

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

BUSINESSES
Santa Rosa’s total number of businesses ranked highest among Sonoma County cities at 7,502, and the amount of businesses per resident stood at 46 businesses per 1,000 residents.

COMMERCIAL VACANCY RATES
Retail, industrial, and office commercial vacancy rates indicate the amount of properties actively on the market and available for lease. While some levels of vacancy naturally develop as a consequence of friction, lower vacancy rates indicate the demand for incorporation in a particular city. Following the recession the Santa Rosa area experienced a downward trend in vacancy rates. In 2017, retail and industrial space vacancy rates experienced a slight rise to around 3 and 5% respectively. Office vacancy rates declined to 10.9% in 2018, down from the 17% peak in 2014. More flexible working conditions and requirements (telecommuting, hoteling, co-working spaces, etc.) explain relatively higher office vacancy rates, while industrial and retail spaces, due in part to their inflexible space requirements, remain in higher demand.
INCOME & SPENDING

MEDIAN HOUSEHOLD INCOME
At $62,620—below the countywide average ($70,221), Santa Rosa’s median household income ranked third lowest among Sonoma County cities. However, 2023 forecasts project a 4.4% annual, or 22% total, increase in median household income. Projections show Santa Rosa’s per capita income growing by 20%, from $33,624 to $40,273 between 2018 and 2023.

HOUSEHOLDS BY INCOME
Santa Rosa residents’ most common income brackets, $50,000-$75,000, stood at 18%. Additionally, Santa Rosa housed a greater share of low and middle-income households relative to the county, and 72% of Santa Rosa households earned less than $100,000—5% more Santa Rosa households earned under $75,000 that the county.
INCOME & SPENDING

TOTAL TAXABLE SALES
Representative of local business success and residents’ purchasing power, total taxable sales indicate aggregate economic health. However, because total taxable sales correlates positively with population size, examining taxable sales per capita gives deeper insight into Santa Rosa's economy. Santa Rosa businesses recorded $3.3 billion in total taxable sales in 2017, a 2.7% increase from the previous year consistent with the post-recession economic recovery forecasts. Additionally, Santa Rosa realized nearly $20,000 in taxable sales per capita.

CONSUMER SPENDING
Housing comprised the greatest portion of Santa Rosa residents’ spending at 37%, followed by health care and food spending. Consumption in other categories like apparel, recreation, and education, each defined less than 10% of average consumer spending. However these percentages are averaged out across the total population and spending varies across households.
HOME SALES PRICE
Third lowest among Sonoma County’s nine cities, Santa Rosa’s median home sales price grew to $585,500 in 2018—growing 11% annually over five years—fourth slowest in the county.

![Median Home Sales Price Graph](#)

Source: Bay Area Real Estate Information Services (www.bareis.com)

Median Home Sales Price Growth 2013-2018

![Median Home Sales Price Growth Chart](#)

Source: Bay Area Real Estate Information Services (www.bareis.com)

Median Home Sales Price 2018

![Median Home Sales Price Chart](#)

Source: Bay Area Real Estate Information Services (www.bareis.com)
Housing

**DAYS ON MARKET**

Homes in Santa Rosa averaged 51 days on market in 2018, indicating the fourth highest housing demand in the county for the price. Additionally, 38% of all homes in Sonoma County were sold in Santa Rosa.

**HOUSING VACANCY RATES**

Santa Rosa’s 2010-2017 Housing vacancy rate decreased to 4% in 2017. Census breakdowns show homeowner vacancy rates at 1%, and rental vacancy rates at 2%. Homeowner and rental vacancy rate measures the number of homes for sale or rent on the market, and indicates market activity displaying housing demand or lack thereof. Santa Rosa’s relatively low vacancy rates compared to the county, state, and the U.S., indicate higher housing demand.
EDUCATION

WORKFORCE EDUCATION
Nearly 86% of Santa Rosa adults (25+) possessed at least a high school diploma, lower than the county (88%), and country (88%), but higher than the state (83%). Nearly 32% possessed at least a bachelor’s degree, lower than the county (35%), the state (33.5%), and matching the country (32%). The proportion of Santa Rosa adults with some college experience stood similar to that of the county due to Santa Rosa Junior College.

SMARTER BALANCED RESULTS
Smarter Balanced, an individual needs focused Math and English assessment system aligned to California’s Common Core Standards, presents a metric for student performance across California schools for several different grades. About 30% of Santa Rosa 11th graders met or exceeded the standard for math, while 54% did for English.

For a list of schools located in each district, visit http://www.scoe.org/pub/htdocs/finddistrict.html.

ENGLISH LEARNERS
Nearly 14% of Santa Rosa students were English learners, well below county (20%) and state (19%) averages. The California Department of Education defines an “English Learner” as a student for whom English is not the spoken language at home and who has been assessed to lack a sufficient level English comprehension. Sonoma County schools allocate resources to support English Learners in becoming proficient.
### CITY DATA SNAPSHOT

<table>
<thead>
<tr>
<th>City</th>
<th>Total Population</th>
<th>Unemployment Rate</th>
<th>Median Household Income</th>
<th>Median Home Sales Price</th>
<th>Total Taxable Sales</th>
<th>Cohort Graduation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloverdale</td>
<td>9,215</td>
<td>2%</td>
<td>$60,170</td>
<td>$561,000</td>
<td>$83.7 million</td>
<td>86.7%</td>
</tr>
<tr>
<td>Cotati</td>
<td>7,633</td>
<td>2.9%</td>
<td>$65,753</td>
<td>$545,000</td>
<td>$195.8 million</td>
<td>76.5%</td>
</tr>
<tr>
<td>Healdsburg</td>
<td>12,007</td>
<td>2.6%</td>
<td>$68,432</td>
<td>$895,000</td>
<td>$415.7 million</td>
<td>92.1%</td>
</tr>
<tr>
<td>Petaluma</td>
<td>61,479</td>
<td>2.7%</td>
<td>$84,033</td>
<td>$723,500</td>
<td>$1.2 billion</td>
<td>88.7%</td>
</tr>
<tr>
<td>Rohnert Park</td>
<td>44,106</td>
<td>3.1%</td>
<td>$62,079</td>
<td>$545,000</td>
<td>$666.1 million</td>
<td>76.5%</td>
</tr>
<tr>
<td>Santa Rosa</td>
<td>169,629</td>
<td>3.2%</td>
<td>$62,620</td>
<td>$585,000</td>
<td>$3.3 billion</td>
<td>83.3%</td>
</tr>
<tr>
<td>Sebastopol</td>
<td>7,698</td>
<td>4.6%</td>
<td>$70,746</td>
<td>$849,750</td>
<td>$168 million</td>
<td>90.1%</td>
</tr>
<tr>
<td>City of Sonoma</td>
<td>11,286</td>
<td>4.2%</td>
<td>$76,015</td>
<td>$794,615</td>
<td>$274.2 million</td>
<td>88.2% (Sonoma Valley Unified)</td>
</tr>
<tr>
<td>Windsor</td>
<td>27,722</td>
<td>2.9%</td>
<td>$85,518</td>
<td>$655,000</td>
<td>$383 million</td>
<td>87.7%</td>
</tr>
<tr>
<td>Sonoma County</td>
<td>509,142</td>
<td>3.1%</td>
<td>$66,783</td>
<td>$635,000</td>
<td>$9.4 billion</td>
<td>83.7%</td>
</tr>
</tbody>
</table>
NOTE ON DATA SOURCES

The 2019 Santa Rosa City Profile and Projections Report is a brief summary on various demographic, economic, and social aspects of the city. This report is meant to act as a spot-in-time profile to reflect conditions in the city in a given year. The Sonoma County Economic Development Board’s (EDB) research is developed from information available from outside sources and public information as well as previously published material. The 2019 Santa Rosa City Profile and Projections Report offers partial or composite representations of raw data and cites’ respective source datasets. For more information, please see the listed sources or contact the EDB.

All efforts have been made to ensure the accuracy of all data contained within this report, but does not guarantee its 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 2019 Santa Rosa City Profile and Projections Report was developed from national and local data sources. Interested readers are encouraged to contact data source agencies or organizations for further research. Readers are also invited to suggest topics for future reports by contacting the EDB.

This report was prepared by Anthony Hakim. Please direct any questions, comments, or suggestions to (707) 565-7170 or edb@sonoma-county.org.

ACKNOWLEDGMENTS

This report would not be possible without the input and collaboration of the City of Santa Rosa and the Santa Rosa Metro Chamber of Commerce.

DATA SOURCES

Bay Area Real Estate Information Services
California Board of Tax and Fee Administration
California Department of Education
California Assessment of Student Performance and Progress
California Employment Development Department
EMSI
ESRI
Keegan & Coppin, Inc.
U.S. Census
U.S. Census 2017 American Community Survey