



# Sonoma County Indicators

Vital Signs that Measure our Economy & Community

# 2013

UNABRIDGED  
EDITION

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# 2013 Sonoma County Indicators

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The Sonoma County Economic Development Board (EDB) is pleased to present the *2013 Sonoma County Indicators Unabridged 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. The report has been updated and expanded since the publication of an abridged edition in January 2013, in an effort to provide the most current and comprehensive annual data.

The report features a "competitiveness index" section intended to measure regional competitiveness not only by economic elements but through the region's quality of life and how the region supports innovation. The "Quality of Place Index" and "Innovative Environment Index" were created to measure these types of competitiveness.

Some highlights and challenges in this report include:

- Sonoma County is a competitive place to do business both because of an attractive business climate and the high quality of life shown through the high scores on the Innovative Environment Index and the Quality of Place Index, respectively.
- The seasonally unadjusted unemployment rate for Sonoma County was 6.5% in April 2013, a five-year low and below both the state wide and national averages. Job growth in Sonoma County was 3.9% from February 2012 to 2013, placing it 4th among competing counties and 13th out of all counties in California.
- Sonoma County is leading the way in many environmental metrics, and providing other regions with examples of responsible environmental stewardship as we grow.
- Tourism indicators are overwhelmingly positive. Sonoma County's tourism industry added 380 jobs, or by about 2% from 2010-11. Revenue from the transient occupancy tax (TOT) totaled \$22 million in 2012, an all-time high for Sonoma County. Together, state and local taxes generated by visitors totaled \$94.9 million in 2011.

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](http://www.sonomaedb.org). This annual assessment of our region's economic progress is meant to help guide discussions by local business, government, community and workforce 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  
Chair  
Economic Development Board



Ben Stone  
Executive Director  
Economic Development Board

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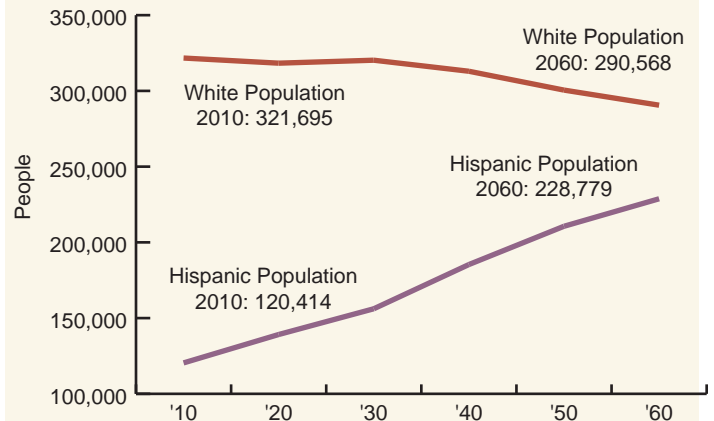
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# Executive Summary

## Economy

- **Most businesses in Sonoma County are small, as 68% of firms have fewer than four employees.** Small businesses, primarily startups, tend to increase in number during a recession, as many workers who have lost their jobs turn their backs on the traditional labor market. In the U.S., 99.7% of all employer firms are small businesses (defined as having fewer than 500 employees), in Sonoma County 99.8% of employer firms have fewer than 250 employees.
- **Sonoma County has the second highest number of business establishments per resident, among comparable counties, indicating a high level of economic activity.** A higher number of business establishments per capita imply a healthy environment where businesses can prosper.
- **Between 2010 and 2011, the percentage of residents living below the federal poverty line decreased.** Sonoma County was one of few counties that experienced a decrease in this figure from 2010 to 2011. In 2011, 12.2% of Sonoma County's population lived below the poverty line; in the United States, 16.6%.
- **Between February 2011 and 2012, the number of jobs in Sonoma County rose by 3.9%. Accordingly, the unemployment rate has fallen and stood at 6.5 percent in April 2013.** Over the past three years, the fastest growing industries have been Manufacturing and Retail Trade, at 10.7 and 4.8 percent respectively.
- **With signs of economic recovery after the recession, many of Sonoma County's core industry metrics remain strong and new strengths are coming to the fore.** Sonoma County's ten-year employment trends show that job growth has been primarily concentrated in sectors paying annual wages above the county and national averages, a trend which could potentially increase the average pay of Sonoma County residents over time.
- **Our population is growing both older and younger.** The number of seniors (residents ages 85+) is expected to grow by 47% from 2010 to 2020. However, the age group for those aged 25 and under is also growing. This is in part due to the growing Hispanic population, which is a substantially younger population.

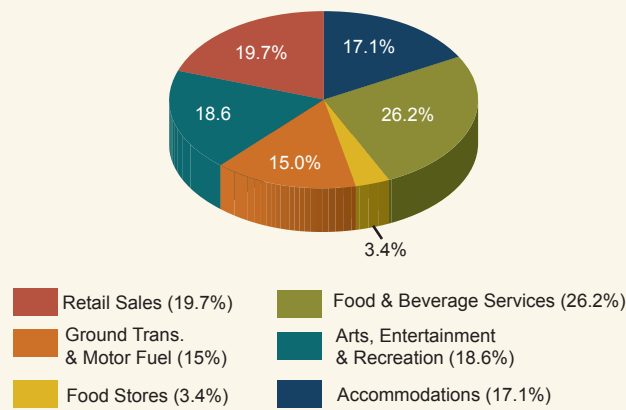
**Sonoma County Population Projections, 2000-2060**



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

- **Sonoma County's population is becoming much more diverse and larger.** Birth rates for the most populous ethnicities mirror state trends toward increasing diversity, as the Hispanic birth rate in Sonoma County is twice the county average. Sonoma County's population is projected to increase 27% by 2060, 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.
- **Sonoma County is becoming a safer place to live.** Five-year property and violent crime rates are down and Sonoma County boasts one of the lowest crime rates among comparable counties.
- **Educational achievement gaps is an issue of concern for Sonoma County.** High school exit exam scores are one of many indicators reflecting the substantial achievement gaps among various populations in the county. Another indicator is the number of high school graduates who have completed all courses required for UC or CSU entrance. In the 2011-12 school year, 19.9% of Hispanic graduates met this requirement compared to 36.5% of white graduates.
- **The largest industry growth is expected in Professional & Business Services, Leisure & Hospitality, and Leisure & Hospitality.** These industries are areas of opportunity for employment and business growth.

## Distribution of Visitor Spending by Commodity Purchased, Sonoma County, 2011



## Tourism

- Tourism employment accounted for 9% of total employment in Sonoma County in 2011.** Workforce health is reliant on discretionary spending and is therefore sensitive to the economic climate. The change from 2010 to 2011 in the number of tourism jobs in the county was 2.3%. This indicates that Sonoma County gained 380 tourism sector jobs from 2010 to 2011.
- Sonoma County had the third-largest destination spending among comparable counties in 2011.** The value of destination spending in Sonoma County in 2011 was \$1.47 billion. This is an 8% increase in total destination spending from 2010. This increase in spending reflects Sonoma County's popularity as a tourist destination and that the tourism sector of the economy is returning to prerecession levels.
- Tourism is a significant source of tax revenue for local governments, with visitor-generated tax revenue currently making up almost 19% of total local tax receipts.** Total visitor generated local taxes, including TOT, in 2011 were an estimated \$31.4 million. Visitor-generated tax receipts create a source of revenue for the state, contributing approximately \$63.5 million in 2011. Together, state and local taxes generated by visitors totaled \$94.9 million in 2011. Sonoma County is ranked third in comparable counties for visitor-generated tax receipts.
- Total industry earnings by travel spending in 2011 were \$442.7 million.** This is a 4.9% increase from 2010. All comparable destinations experienced increases in industry earnings except Santa Cruz, with Sonoma County experiencing the largest percentage increase.

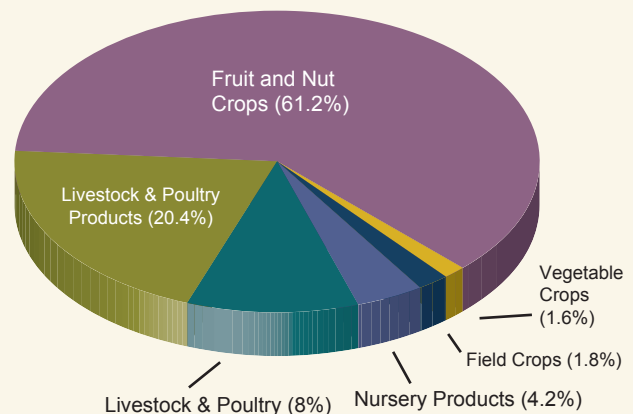
## Health

- Sonoma County has a higher rate of health insurance coverage than the state average.** In 2009, UCLA's California Health Interview Survey reported that 87% of Sonoma County residents had health insurance. Most health insurance is employment-based.
- Sonoma County residents with lower levels of education are more likely to be obese or smoke.** Sonoma County residents without a high school diploma are twice as likely to be obese than those with a college degree. A person's health is shaped by social factors such as education and income.
- Only 64% of Sonoma County youth reported being engaged in physical activity at least three days a week,** this rate is below most comparable counties and the state. Another troubling statistic is that 41% of 11th grade students reported using alcohol or other drugs in the last 30 days, slightly higher than the California average. It is important for healthy habits to begin childhood in order to become a healthy adult.

## Environment & Agriculture

- Between 2010 and 2011, the gross production value of agricultural crops in Sonoma County decreased by 1.7%.** The large increases in livestock and poultry products, vegetable crops and field crops offset decreases in fruit and nut crops.
- Sonoma County is committed to environmental stewardship.** Sonoma County ranked fourth in the 2011 Environmental Quality Index, a decrease from its 2009 ranking in second. The county ranked high for waste disposal and air quality, but there is always room for improvement by reducing residential consumption of natural gas and non-residential electricity consumption.

## Total Agriculture Production Value, Sonoma County, 2011



Source: Sonoma County Office of Agricultural Commissioner, Sonoma County Agricultural Crop Report, 2011

# Trends

## *What is a trend?*

Trends state changes in data over time. They are a simple way to identify changes in community indicators, **based on one, five or ten-year periods of observation**. In this section there are trend summaries for Sonoma County, offering a **snapshot of information and measure recent economic and community performance**. Performances are categorized as **positive, concerning, or unclear** trends. The purpose of trends is to identify those areas where Sonoma County is succeeding, and just as importantly, those where it faces challenges.

## Positive Trends

### Economy

#### **Job Growth**

Over the past year Sonoma County has experienced job growth that is over 1.5 times faster than the state average. While unemployment remains high relative to prerecession levels, Sonoma County has seen a steady decrease in the unemployment rate over the past two years. (See page 9)

#### **Business Establishments per capita**

Business establishments per 10,000 residents is high in Sonoma County relative to comparable counties. This signals a high level of economic activity and a healthy business environment. (Pg. 9)

#### **Poverty**

The percentage of Sonoma County residents that live below the poverty line has been decreasing. Sonoma County was one of few regions to see a decrease in poverty from 2008 to 2009. (Pg. 10)

### Environment

#### **Electricity Consumption**

Ranking third lowest in non-residential consumption per capita relative to similar counties, Sonoma County continues to perform well in energy conservation. (Pg. 13)

#### **Waste Disposal**

Sonoma County's waste disposal per capita continues its six-year downward trend. Since 2011, waste disposal per capita has decreased 11% from 3.9 pounds per person per day to 3.5 pounds. (Pg. 17)

### Society

#### **Crime Rates**

The property crime rate in Sonoma County has decreased 29.4% during the five years between 2004 and 2009. During this same time period, the violent crime rate has decreased 16.7%. (Pg. 27)

#### **College Educational Attainment**

The educational attainment of the county is high, with about 32% of the population having at least a bachelor's degree and 87.4% having at least a high school education. (Pg. 15)

### Tourism

#### **Hotel Occupancy Rates**

Sonoma County hotel occupancy rates have increased four percentage points from 2011 to 2012. Preliminary results for 2013 suggest that Sonoma County's lodging industry is returning to levels seen prior to the 2007-2008 recession. (Pg. 31)

#### **Transient Occupancy Tax (TOT) Revenues**

TOT revenue started increasing in the first quarter of 2010, and has continued to do so through 2012. Current TOT revenue, \$22.4 million, is the highest it has ever been. (Pg. 32)

#### **Industry Earnings**

Total industry earnings by travel spending in 2011 were \$442.7 million, a 4.9% increase from 2010. Industry earnings are at an all time high and 6% higher than the previous peak in 2008. (Pg. 33)



## Concerning Trends

### Real per Capita Income

During the period of 2007-2009, real per capita income decreased 10.9% from \$44,745 to \$39,137. Over the next two years, real per capita income recovered just 1.8%. Higher real wages lead to increased consumer purchasing power, an essential element of economic growth. (Pg. 10)

### Education Achievement Gap

While Sonoma County performs well compared to the state average and other counties, English language proficiency and high school graduation rates reflect educational achievement gaps between different ethnic groups in Sonoma County. (Pg. 24)

### Natural Increase of the Population

While Sonoma County performs well compared to the state average and other counties, English language proficiency and high school graduation rates reflect educational achievement gaps between different ethnic groups in Sonoma County. (Pg. 26)

### Aging of the Workforce

Every industry showed an increase in total employment age 55+, and also in the percentage of the industry employment age 55+. The proportion of workers nearing retirement age in the educational services industry increased 12 percentage points from 2010 to 2011.

### Water Usage

Efforts to conserve water have increase over the past five years; however, yearly water usage in Sonoma County has been trending upwards since 2009-10. (Pg. 15)

## No Clear Trend

### Age-Adjusted Cancer Mortality Rates

Between 1998 and 2008 the cancer mortality rate for Sonoma County has declined but has never fallen below the state average. Yet even with high cancer mortality rates, Sonoma County has a higher percentage of residents living beyond the age of 85 than the California average. (Pg. 24)

### High School Dropout Rates

While the annual adjusted dropout rate for Sonoma County has fallen from 5.8% to 4.1% over the past three years, Sonoma County still ranks seventh of comparable counties. High school dropout rates are an indicator of the value of education to Sonoma County youth and their families. (Pg. 24)

### Housing Market

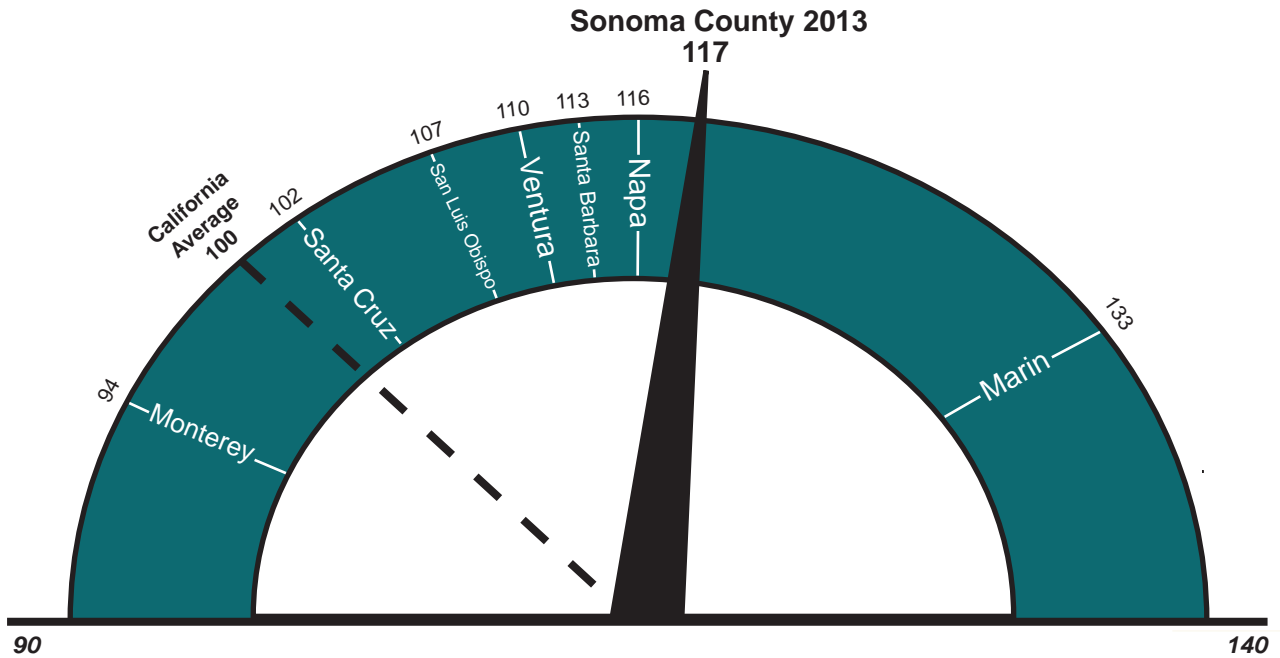
There is an unclear trend regarding the future of Sonoma County's housing market. The median home price for Sonoma County was \$385,000 in February 2013, a 22% increase from 2011. According to Moody's Analytics, a reduction in the number of unsold existing homes will continue to lift housing prices, but permits for new residential construction has yet to increase. (Pg. 28)

# 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.

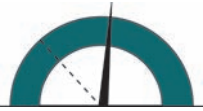
## Quality of Place Index

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 six 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 due primarily to good air quality, high access to health care, and high per capita income. These individual measures are summarized below.

### The Indicators:



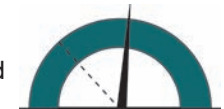
**Air Quality:** A weighted average of days with air quality measured as "good" or "moderate" by the Environmental Protection Agency. Sonoma County tied for third with Marin County with a score of 110.

**Crime Rate:** The crime rate measures the number of both violent and property crimes committed per 100,000 people. Sonoma County ranked fifth among comparable counties with a score of 157, indicating that crime rates in Sonoma County were 57% below the state average.



**Commute Time:** The commute time measures the average time spent commuting by county residents. Sonoma County ranked fifth among comparable counties with a score of 108. However, the average commute time was 8% below the California average commute time.

**Access to Health Care:** Number of health care practitioners and technical occupations (NAICS 62) per capita population provides a measure of access to health care professionals. Sonoma County ranked third among comparable counties for access to health care with a score of 110.



**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 second among comparable counties for culture and recreation with a score of 102.

**Per Capita Income:** Earnings per person, provides a measure of standard of living and economic vitality. Sonoma County tied for fourth among comparable counties with an income per capita index score of 111.



Sources: Environmental Protection Agency ([www.epa.gov](http://www.epa.gov)), Federal Bureau of Investigation ([www.fbi.gov](http://www.fbi.gov)), U.S. Census Bureau ([www.census.gov](http://www.census.gov)), Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)), U.S. Census Bureau, U.S. Census Bureau 2011 American Community Survey



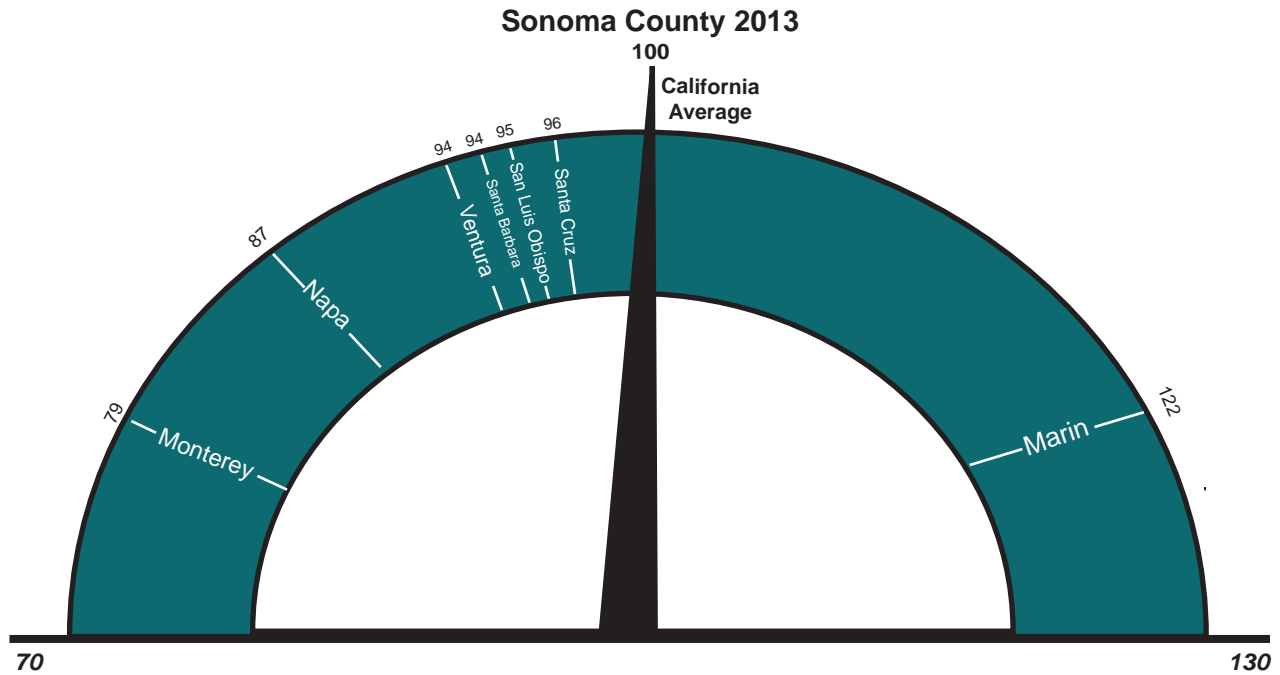
# How Competitive is Sonoma County?

## What is an index?

This section examines different indicators of regional economic competitiveness. Each indicator is divided by the value for California and multiplied by 100. An adjusted value of 120 means the region is performing 20% above the state average, and an adjusted value of 90 means the region is performing 10% below the state average. Each indicator is weighted equally in the overall index. For more information, see "Index Methodology" on page 39.

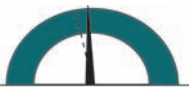
## Innovative Environment Index

An environment of innovation encourages the launch of new businesses, provides growth opportunities for existing businesses, and attracts businesses from outside the area. It is important because a strong innovative environment leads to business growth in the region. This index examines six measures indicative of an innovative environment in order to establish how competitive Sonoma County is relative to comparable counties.



**Overall:** Sonoma County's above the state average ranking is primarily because of the relative low cost of labor, high percent of the population with high school and college degrees, and the dense concentration of small to mid-size businesses.

### The Indicators:



**Labor Cost:** Labor costs is an important factor in the cost of doing business and is measured by total earnings per employee at the 3-digit NAICS level. Sonoma County had the lowest labor costs among comparable counties with a score of 108, indicating that labor costs are 8% lower than the state average.

**Employment in Technical Professions:** Percentage of employment in computer, science and engineering professions (NAICS 54), which provides a measure of the research and development industry. Sonoma County ranked third relative to comparable counties with a score of 77.



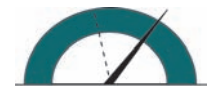
**Concentration of Small to Mid-Size Businesses:** Number of businesses in an area, presented per 1,000 employees. A growing number of small to mid-size businesses over time correlates to a strong environment for new business creation. For this indicator, small to mid-size businesses are classified as having 250 employees or less. Sonoma County ranked second among comparable counties with a score of 112.

**Business Churn:** The business churn metric is the ratio of business births and deaths to the total number of business establishments. This measure of entrepreneurship captures the cycle of the birth of profitable business, and the closing of struggling business. Sonoma County ranked fifth with a score of 91.



**High School Graduates:** 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 second with a score of 105.

**College Graduates:** Percentage of adult population (25+) with a bachelor's degree or higher. Educated residents with specialized skills and knowledge fuel the performance of existing firms and serve to attract new employers. Sonoma County ranked third with a score of 107.



Sources: Moody's Analytics ([www.wsainc.com](http://www.wsainc.com)) 2009, Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)) 2011, California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov)) Q3 2011, U.S. Census Bureau SUSB ([www.census.gov](http://www.census.gov)) 2009, U.S. Census Bureau American Community Survey, 2011,

# Economy

## Payroll Growth & Unemployment Rate

### What is it?

Payroll growth measures the percentage increase in aggregate compensation over both the one-year period from 2011 to 2012, and the annual figure from 2002-2011. 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.

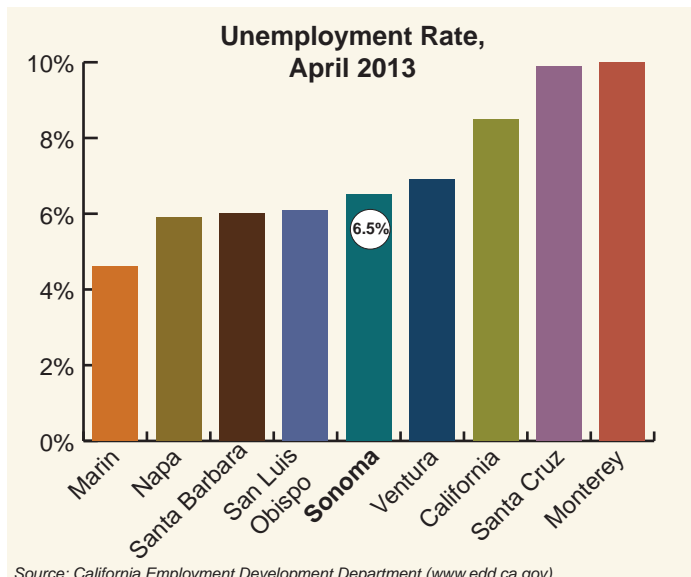
### How is Sonoma County doing?

**There has been steady, positive payroll growth from 2009 to 2011 and total payrolls have grown 13.7% from 2002 to 2011.** Sonoma County had the smallest year over year payroll growth rate among comparable regions with -2.5%.

Sonoma County's unemployment rate was 6.5% in April 2013, the lowest in five years, and about average among comparable regions. **The county's unemployment rate has historically been better than the state and national rates, and in April 2013, the unemployment rate was 0.6% below the nation.**

### 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.**

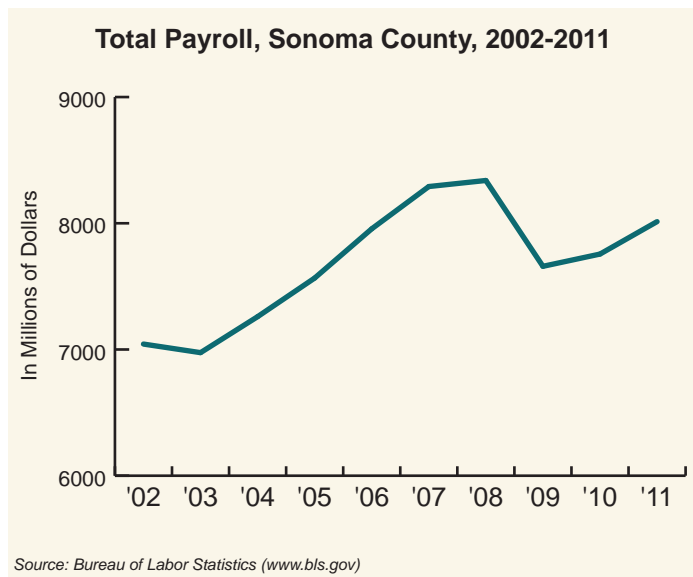


Source: California Employment Development Department (www.edd.ca.gov)

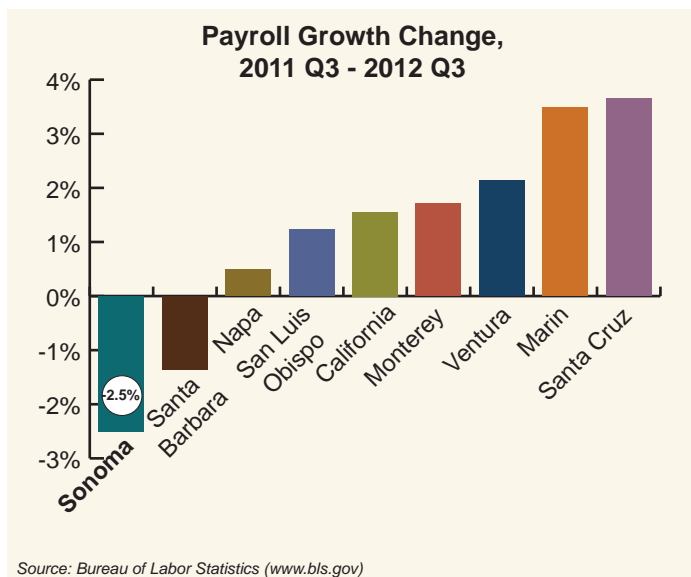


\*Note: The 2013 unemployment rate is through April 2013

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



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



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

Job & Establishment Growth

**What is it?**

Job growth captures the year-over percentage change in the average annual employment. Establishment growth tracks the year-over percentage change in businesses and firms from 2009 to 2010 and 2010 to 2011. Business establishments per 10,000 residents is a measure of the number of businesses on a population-adjusted basis. The size of businesses chart illustrates the proportion of business sizes in Sonoma County.

**How is Sonoma County doing?**

Sonoma County experienced 3.9% job growth from February 2012 to 2013, placing it 4th among competing counties and 13th out of all counties in California.

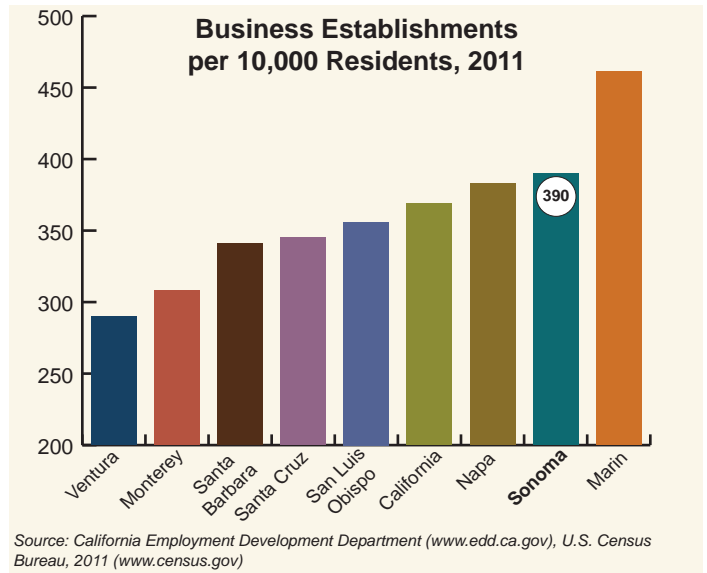
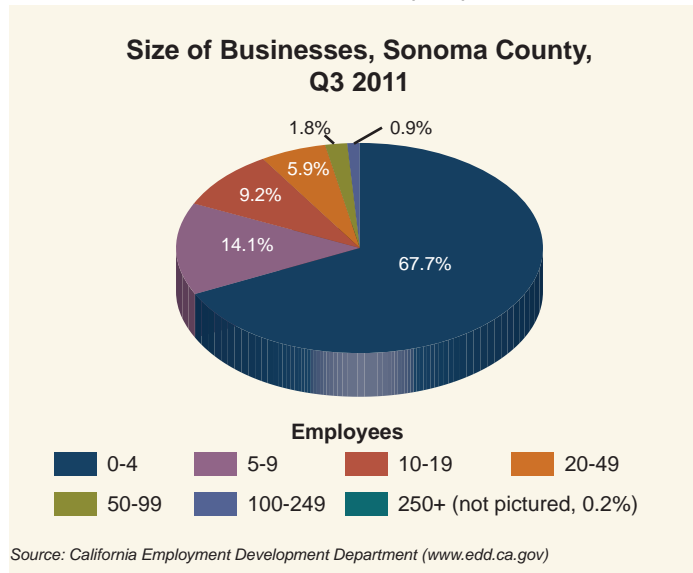
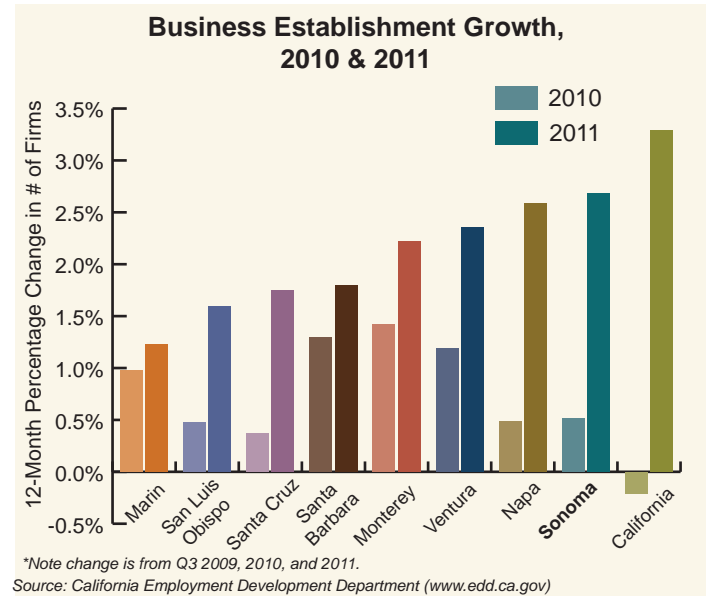
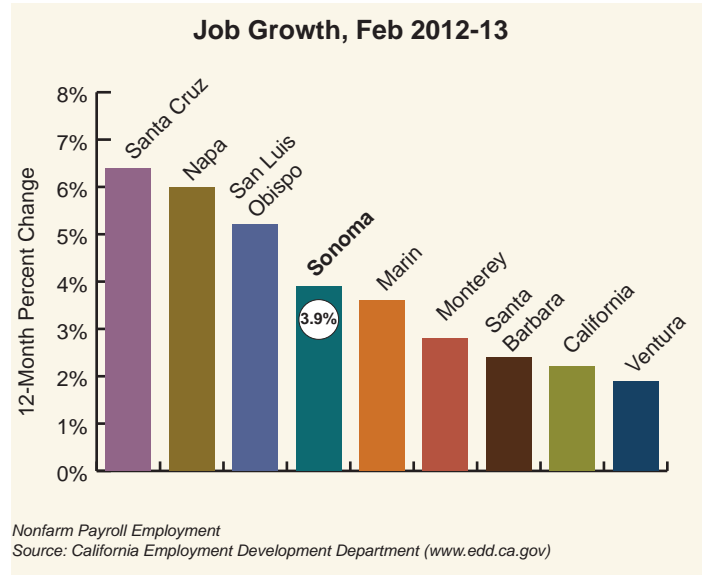
**Sonoma County has the second highest number of business establishments per resident, and the fastest business growth rate among comparable counties, indicating a high level of economic activity.** In the U.S., 99.7% of all employer firms are small businesses (defined as having fewer than 500 employees), in Sonoma County 99.8% of employer firms have fewer than 250 employees.

**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 is an indicator of the overall business climate, because it captures the creation and shuttering of firms. Strong growth reflects the creation of new businesses.

Business establishments per capita is also an indicator to account for economies of agglomeration, the belief that establishments mutually benefit when located near each other. Ideally, more establishments per capita imply a healthy environment where businesses can prosper.



# Economy

## Income Distribution

### What is it?

Income distribution describes inequities in income or wealth distribution among socioeconomic groups. The poverty line attempts to capture the minimum income needed to maintain an adequate standard of living for a given family size. The United States 2011 poverty threshold for a family of four was \$23,021. Household and per capita incomes measure households in Sonoma County in various earnings groups and the average income per person, respectively.

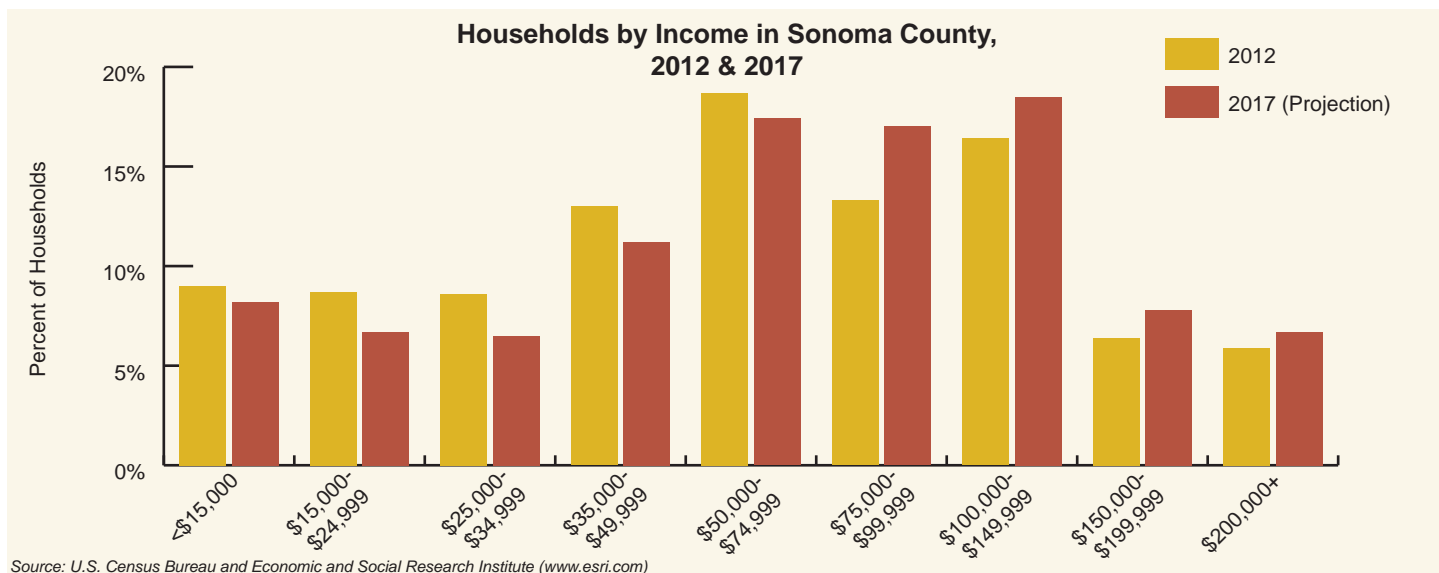
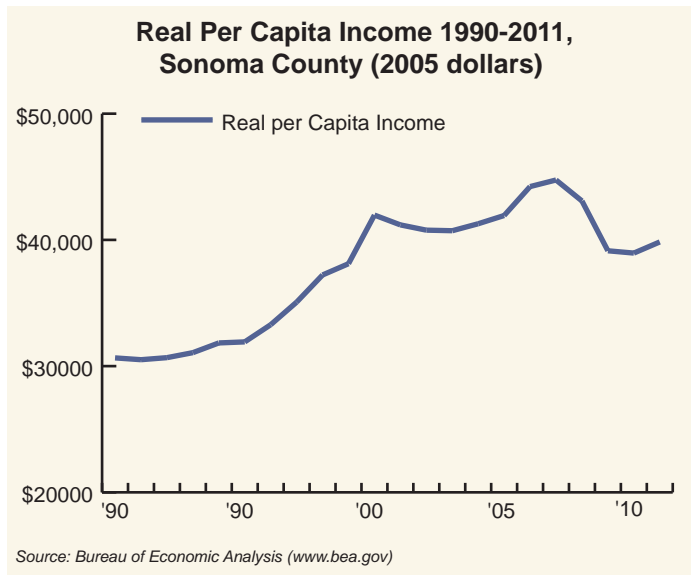
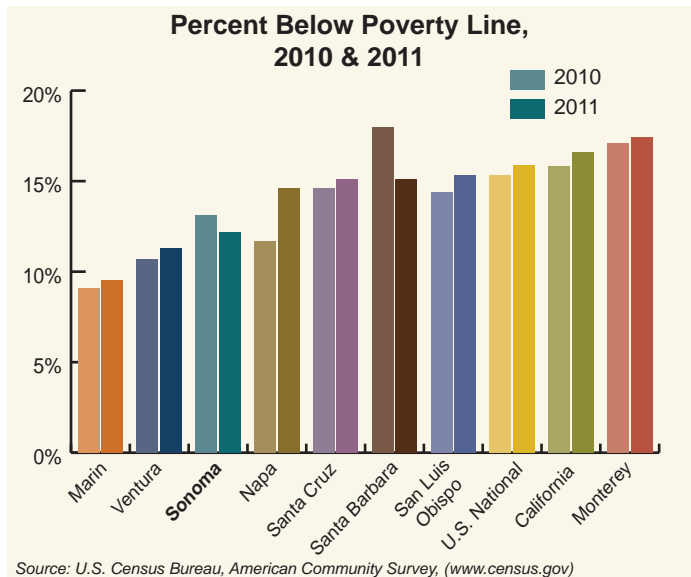
### How is Sonoma County doing?

**From 1990-2011, real per capita income increased 29.9%.** However, from 2007-2009, real per capita income has decreased 10.9%.

Currently, the majority of Sonoma County households have incomes between \$50,000-\$74,999. **Sonoma and Santa Barbara County were the only counties amongst their peers with decreases in the percent of residents living in poverty from 2010 to 2011.** In 2011, 15.9% of the United States' population was below the poverty line; in Sonoma County, 12.2%. 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 County, the amount of people living in poverty is likely higher.

### Why is it important?

**Per capita income shows that wealth is beginning to grow again in the county, and the distribution is projected to decrease the number of lower-income households.** Gaps between rich and poor may indicate changes in demographics in a community, such as education, race and gender. A high poverty rate often indicates a weakening economy, underdeveloped businesses in the community or a scarcity of employment.



## Major Industries

### What is it?

The North American Industry Classification System (NAICS) 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. Indicators include industry employment and regional gross domestic product (GDP) by industry and how it has changed over time as well as the average weekly wages for prominent clusters.

### How is Sonoma County doing?

Over the period of 2002-2010, Sonoma County experienced growth in the Leisure & Hospitality, Educational and Health Services, and Professional and Business Services clusters. In the same time frame, employment decreased significantly in Manufacturing, Construction, Retail Trade, and Farming. Over the past three years, the fastest growing industries have been Manufacturing and Retail Trade, at 10.7 and 4.8 percent respectively.

Real GDP by industry shows the relative importance of selected industries to the local economy. **The Manufacturing and Professional and Business Services industries make up a large part of the Sonoma County economy.**

Moody's Economy gave Sonoma County an average economic diversity index score of 0.44 for 2012, comparing the local economic structure with that of the United States. A rating near 1 means the area mirrors the industrial density of the U.S., while a rating near 0 implies the area has a very different structure than the U.S. All else equal, a more diverse economy can be expected to perform better in the long run.

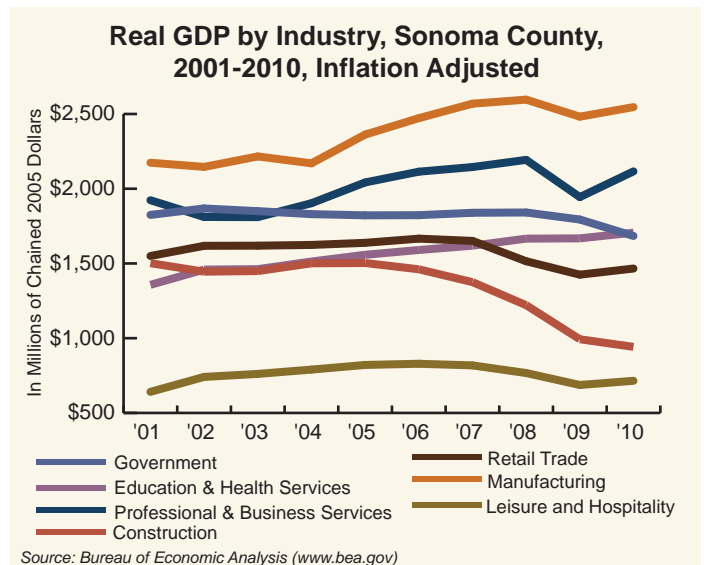
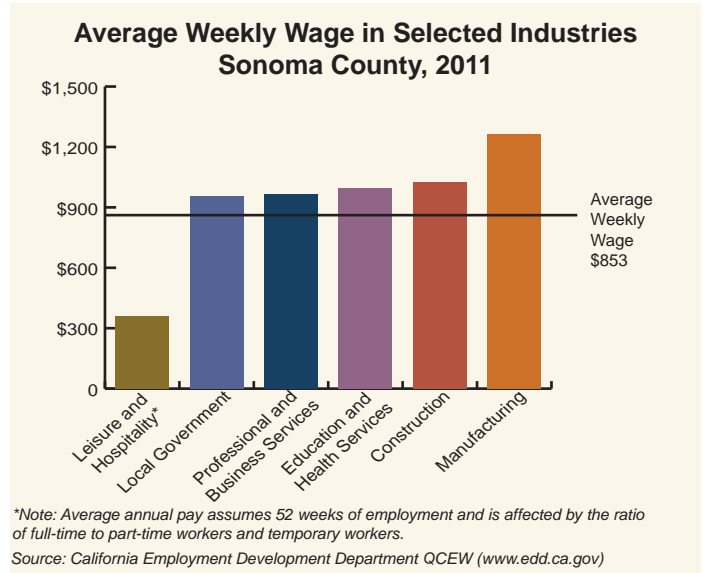
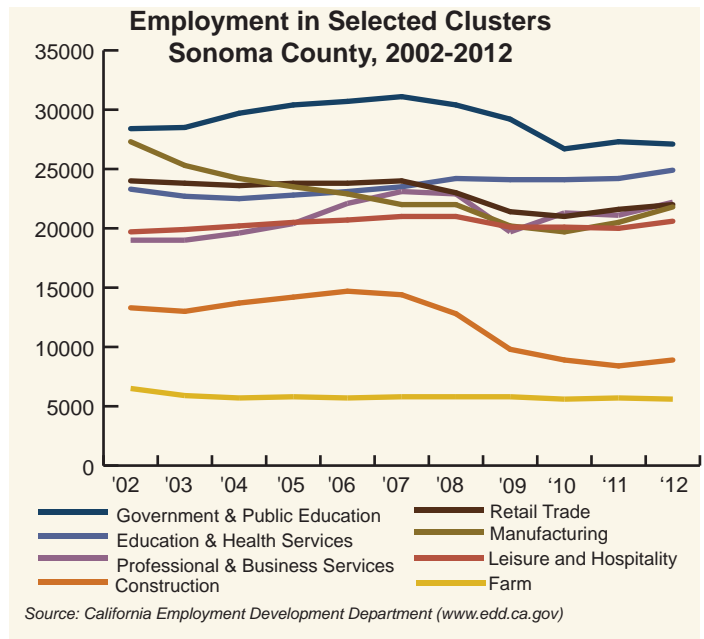
For 2012, the largest employer in Sonoma County is Kaiser Permanente, which offers health services. Health and education-related services are prevalent among the largest county employers.

### 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 an important sector can reduce incomes and quality of life.

Major Private Employers, 2012	
Kaiser Permanente	2,847
St. Joseph Health System	2,239
Sutter Medical Center of Santa Rosa	1,497
Agilent Technologies	1,175
Amy's Kitchen	890
Medtronic CardioVascular	840
Kendal-Jackson Wine Estates	640

Source: North Bay Business Journal, 2013 Book of Lists



# Economy

## Mobility

### What is it?

Mobility in this context focuses on air and ground travel leaving and within the county. The Sonoma County Airport (STS) passenger loads measure air traffic activity in and out of the county. **Commuting patterns show how many people in Sonoma County leave the county for work, where they go, mode of transportation, and how the trends have changed over time.**

### How is Sonoma County doing?

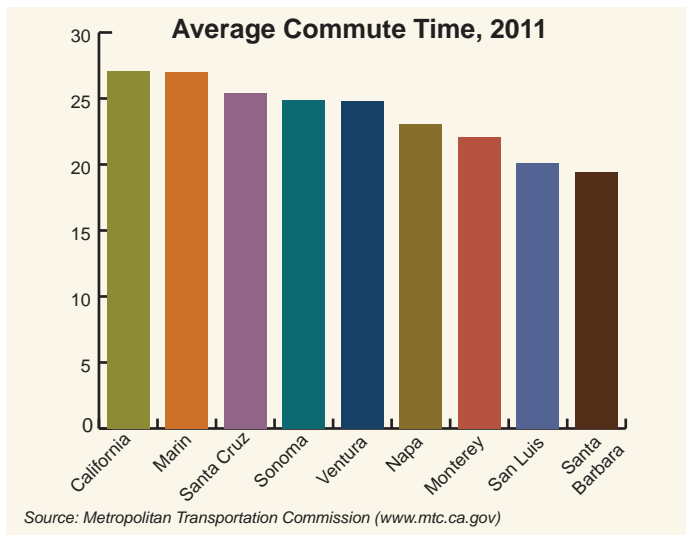
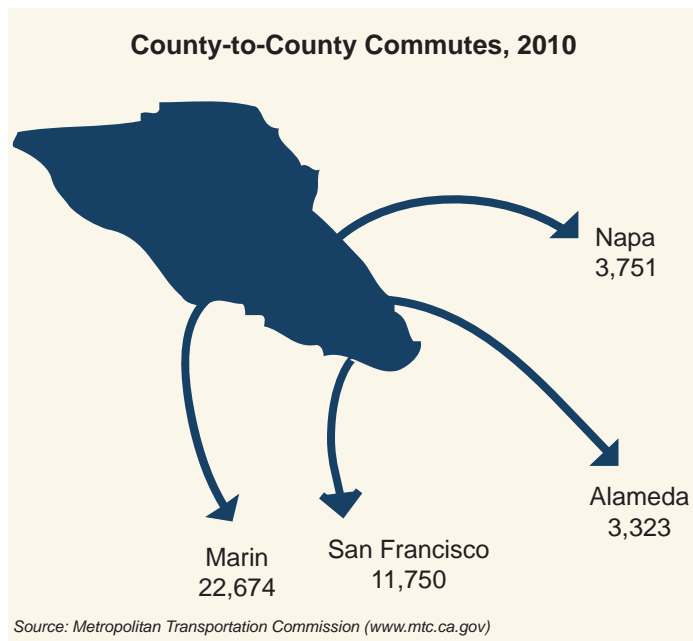
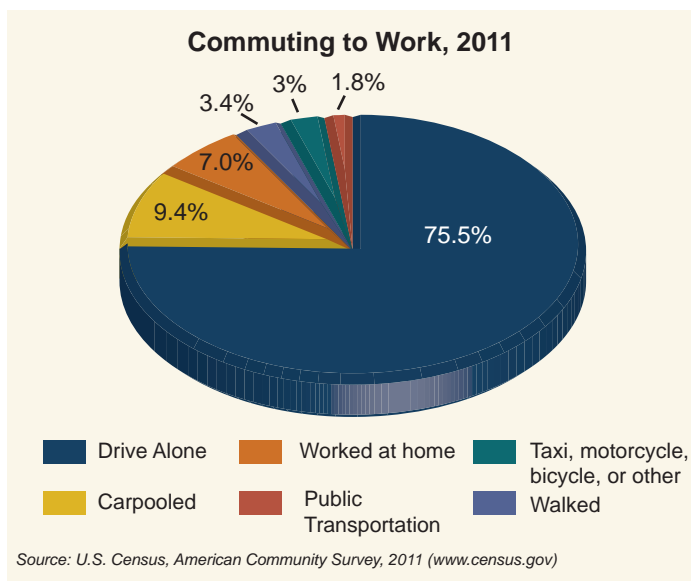
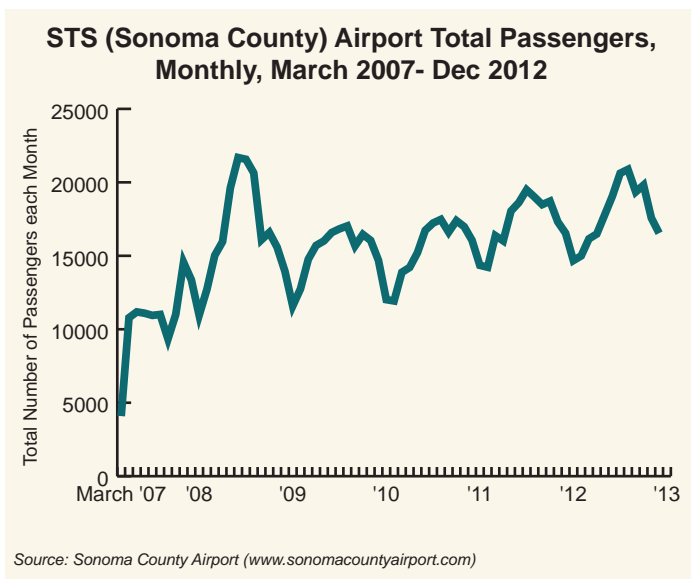
Air traffic resumed to and from Sonoma County in 2007 after a five-year interim period. **Horizon Air traffic at the STS Airport totaled 213,917 passengers in 2012, the largest year by passenger volume, and an increase of 3.2% from the year before.** Most passengers traveled to and from Los Angeles International Airport (LAX), followed by Seattle, Portland, then Las Vegas.

Commute patterns indicate that more than 50,000 Sonoma County residents travel outside the county for work each day. About half travel south to Marin (22,674), while many others travel throughout the bay area, from San Francisco (11,750), to Napa (3,751) and beyond. Over the last twenty years, the number of residents commuting out of the county has grown by 50%, the total population over that time period has risen by approximately 25%.

**In 2011, roughly 75% of Sonoma County residents drove their vehicles alone to work with an average commute time of 24.9 minutes.**

### Why is it important?

Airport connections facilitate economic ties for wider development. More commuting and congestion can reduce Sonoma County's ability to attract and retain businesses and talent.





## Environmental Quality

### What is it?

Environmental quality is a composite of air quality, electricity use, natural gas use and waste generated. The scoring index comparing Sonoma County with other counties ranges from 1 (signifying that the county performed the worst among its peers) to 8 (signifying the county that performed the best). Rankings from each of the four categories were totaled to get the overall index for each county.

Natural gas and electricity consumption per capita measure the amount of resources consumed per person. Gas is mainly used in the residential sector for heating homes and water.

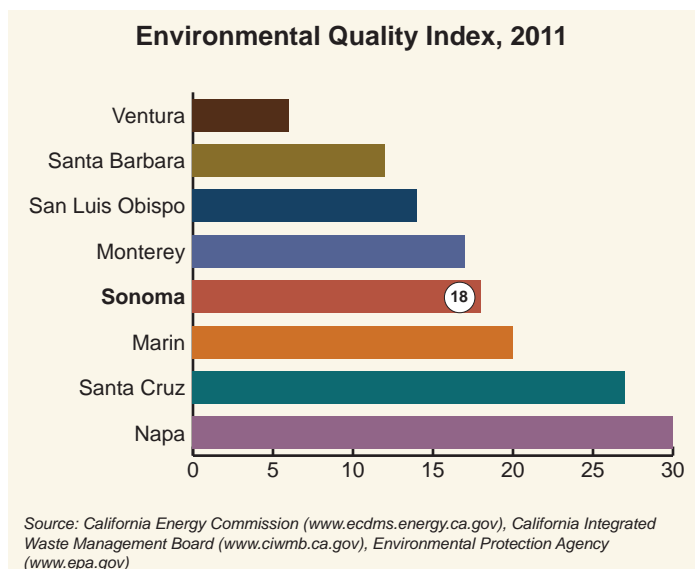
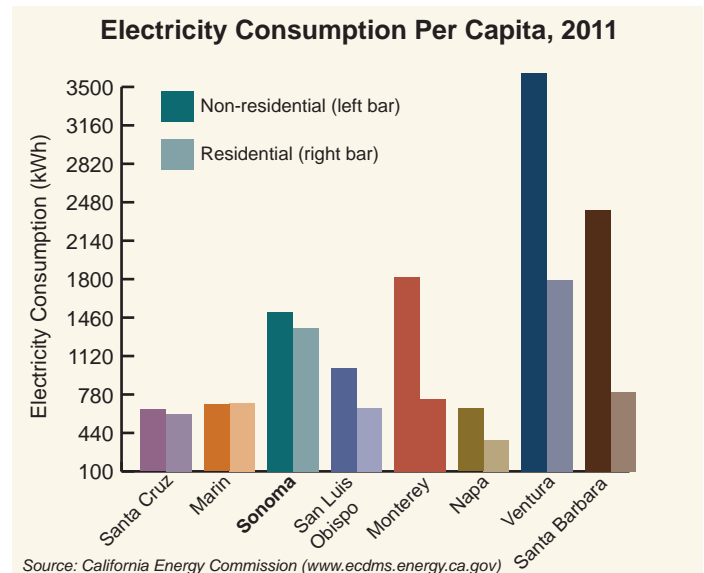
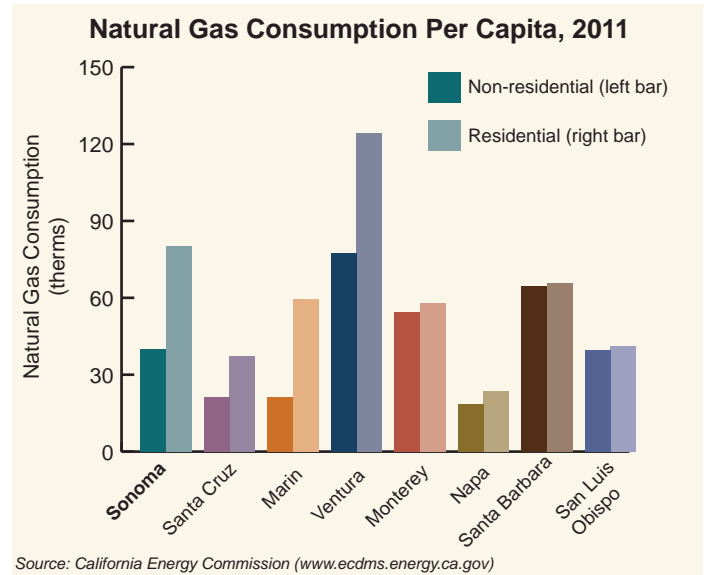
### How is Sonoma County doing?

**Sonoma County ranked in the middle on the 2011 Environmental Quality Index and earned high scores for air quality and waste disposal.**

Current natural gas per capita usage is 40 therms for non-residential users, while the residential sector uses 80 therms per capita. With 2,880 kilowatt hours per capita consumed in 2011, Sonoma County ranks third among comparable counties in electricity consumption. **Non-residential electricity use dropped 54% from 2009 to 2011, resting at a current level of about 1,512 kilowatt hours a year.**

### 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.



### Environmental Quality Index

The environmental quality score used in the environmental quality index is a compilation of the rank (1-8) of each county in four areas of performance: annual waste disposal per capita, natural gas use per capita, electricity use per capita and number of days when air quality was classified as "good", such that the best possible score is 32 and worst is 4.

# Environment

## Air Quality and Open Space

### What is it?

Air Quality measures the number of days that Sonoma County's air quality was classified as "good" by the U.S. EPA's Air Quality Index. Open Space areas are lands selected for preservation in order to protect fragile ecosystems, promote conservation of natural resources, preserve historic sites, or simply to provide public recreation.

### How is Sonoma County doing?

Air quality in Sonoma County was classified to be of "good" quality for 326 days in 2011, a 5% decline from 2010, with no days categorized as "unhealthy for sensitive groups." Sonoma County set a goal of reducing emissions 25% below 1990 levels by 2015, but the county has seen a decline in air quality since 2008.

**Since its inception in 1990, the Sonoma County Agricultural Preservation and Open Space District has protected more than 170,000 acres of land.**

Protected lands in Sonoma County have increased at a greater percentage over the past decade than in any of the other eight Bay Area counties. As of 2011, Sonoma County has protected 173,972 acres, a 38 percent increase from 2002. These lands were selected for preservation in order to provide public recreation, protect natural resources and ecosystems, maintain water supplies, interpret historic sites and preserve Sonoma County's world-renown landscape.

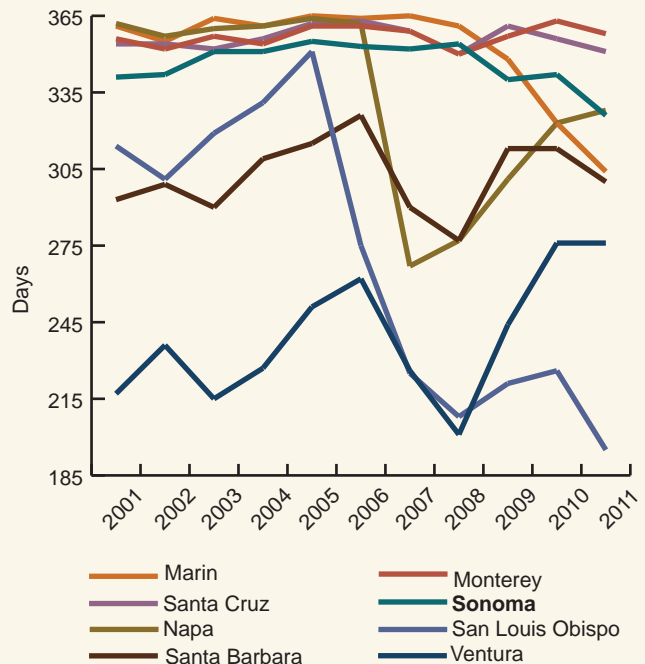
Aside from farmland and protected areas, Sonoma County is also home to 11 California state parks, totalling 31,874 acres.

### Why is it important?

Poor air quality can exacerbate heart and lung illnesses, particularly in young and elderly populations. **Fortunately, the North Bay boasts excellent air quality, well above the state average.**

Protected lands offer significant benefits to the local economy through tourism, agriculture, outdoor recreation and other land-based services. **In addition, parks, open space and protected properties 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.**

**Days with Air Quality Classified as "Good" 2000-2011**



Source: Environmental Protection Agency ([www.epa.gov](http://www.epa.gov)) Air Quality Index Report

**State Parks in Sonoma County By Acreage, 2013**

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

Source: California State Parks ([www.parks.ca.gov](http://www.parks.ca.gov))

**Protected Lands Sonoma County**

Year	Protected Acres
2002	125,196
2008	151,532
2011	173,972

Source: Bay Area Open Space Council, Bay Area Protected Lands 2011 Edition

## Water Conservation

### What is it?

Water deliveries measures the amount of water sold to local retailers each fiscal year. The Sonoma County Water Agency, which manages water deliveries to Sonoma and Northern Marin Counties, collects and distributes water from the Russian River and Lake Mendocino. Peak demand for water occurs during the summer months (June - September).

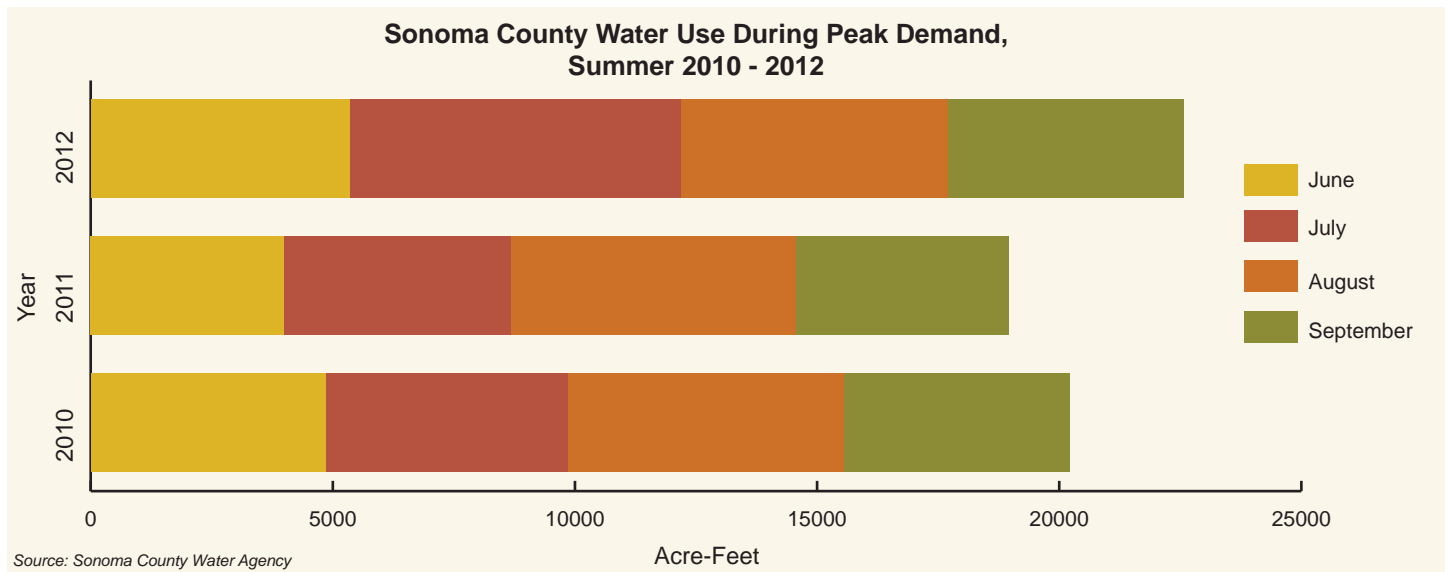
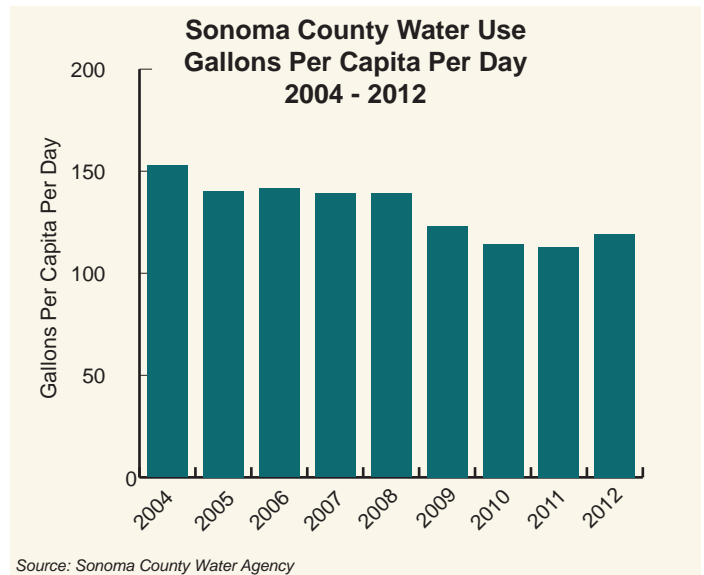
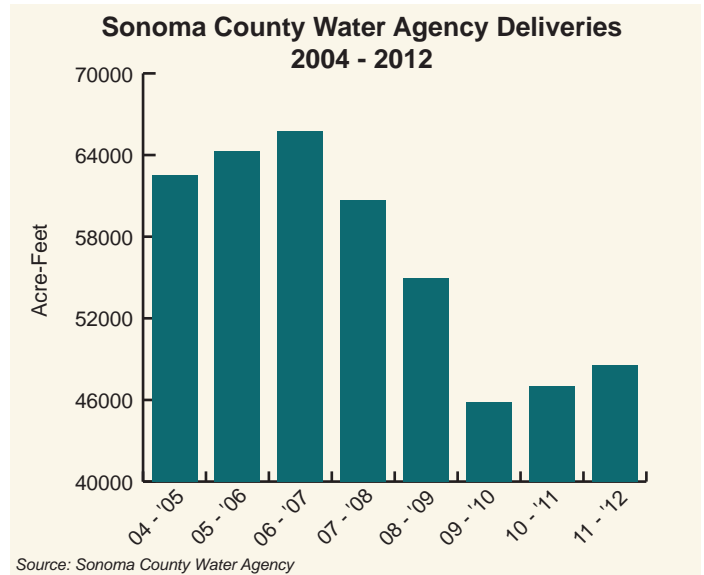
### How is Sonoma County doing?

Efforts to conserve water have increased over the past five years. Both state and countywide conservation efforts, coupled with local drought warnings, have helped drastically reduce water use in recent years. **Through these efforts, water usage, as measured by gallons per capita per day (GPCD), has decreased 16.7 percent from 2008 through 2012 from 139 to 119 GPCD.**

Peak demand for water typically occurs between June and September. During these hot summer months, water demand nearly doubles; this is due to a large increase in outdoor irrigation. The Sonoma County Water Agency and cities have worked to offset this spike in demand by offering residents rebates and resources for low-water-use landscapes.

### Why is it important?

Environmental management directives from the National Marine Fisheries Services, detailed in the Biological Opinion, require the Sonoma County Water Agency to invest in sustainable habitat and fish restoration programs that will restrict summertime flows in the Russian River. Because the county's main water source is also home to three types of endangered salmon: the Steelhead, Coho and Chinook, residents and businesses will be forced to minimize summertime water use for years to come. **Relandscaping is one of the easiest and least expensive ways for the public to reduce potable water use.**



# Environment

## Electricity and Natural Gas

### What is it?

This indicator tracks the two most predominant sources of energy, electricity and natural gas, as well as progress towards renewable sources. Renewable energy comes from sources such as the sun, earth, wind and water and reduces dependency on emission-producing energy sources.

### How is Sonoma County doing?

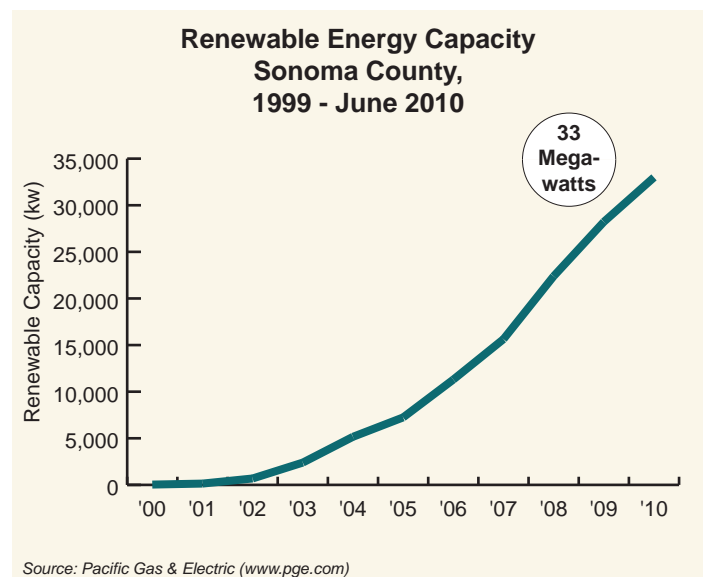
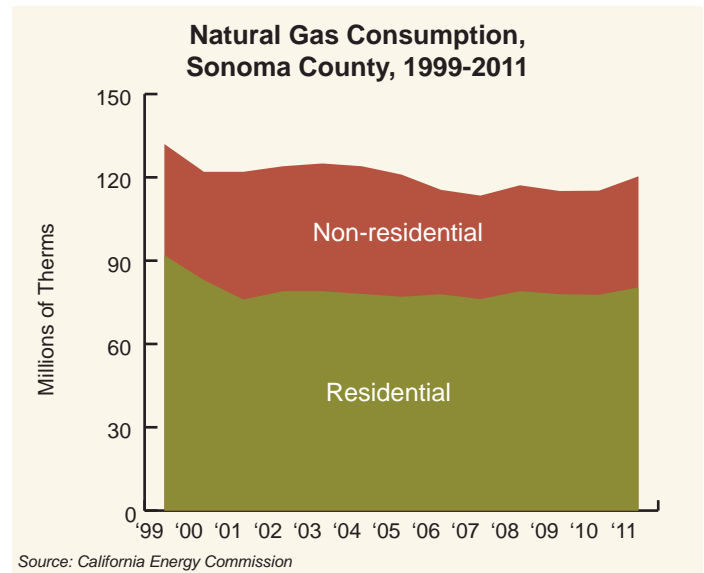
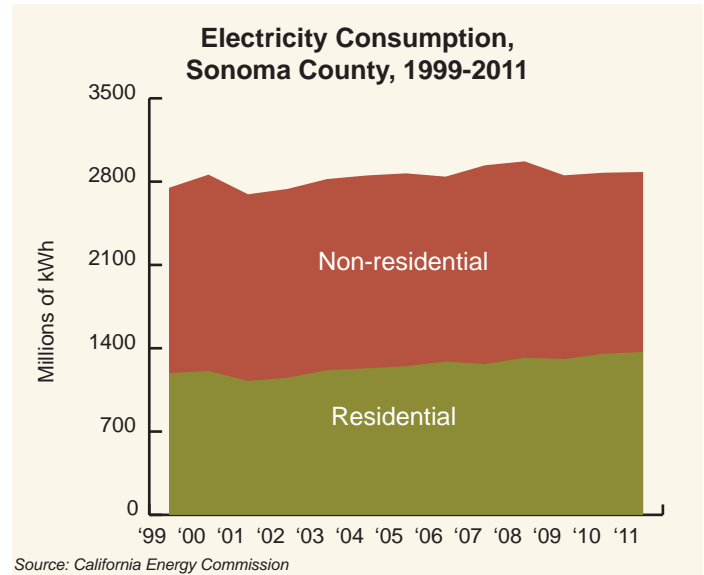
Residential electricity consumption remained relatively consistent for the past decade. However, non-residential electricity consumption saw a 7% decrease in 2009 and has remained fairly stable since then. There was a 3.8% increase in both residential and non-residential natural gas consumption between 2010 and 2011, yielding the highest rate of natural gas consumption since 2005 in Sonoma County.

Sonoma County continues to increase its total installed renewable energy capacity, offering 33 Megawatts of alternative energy, over half of which comes from solar power. This includes solar, wind, geothermal, and biogas generation sources. According to Solar Sonoma County, Sonoma County installed 19 solar energy arrays per 100,000 residents this past August, over five times the statewide average of 3.6. Furthermore, Sonoma County set a record in solar installation with a 318% increase in new systems since August 2009. Many unique incentive programs (e.g. the Sonoma County Energy Independence Program) have created a favorable market for renewable installations.

### Why is it important?

Burning fossil fuel accounts for more than half of the electricity consumed in California, jeopardizing air quality and depleting valuable natural resources. Moving away from fossil fuels and conserving energy can also increase economic competitiveness and lower costs. Dramatically rising energy prices in recent years have spurred many companies to look for innovative methods of energy efficiency and generation. Renewable energy in Sonoma County is likely to continue an upward trend. Not only is it economically viable, but the State of California mandates all investor-owned utilities, such as PG&E, to sell minimally 20% of their energy from renewable resources.

*Between 2006 and 2010, Sonoma County has reduced energy use by the equivalent of 17,000 homes powered for one year.*



## Waste and Household Toxics

### What is it?

Household toxics are items that cannot legally be incorporated into commercial and residential waste disposal services. They include garden chemicals, automotive fluids, paint, cleaners, batteries and fluorescent lights.

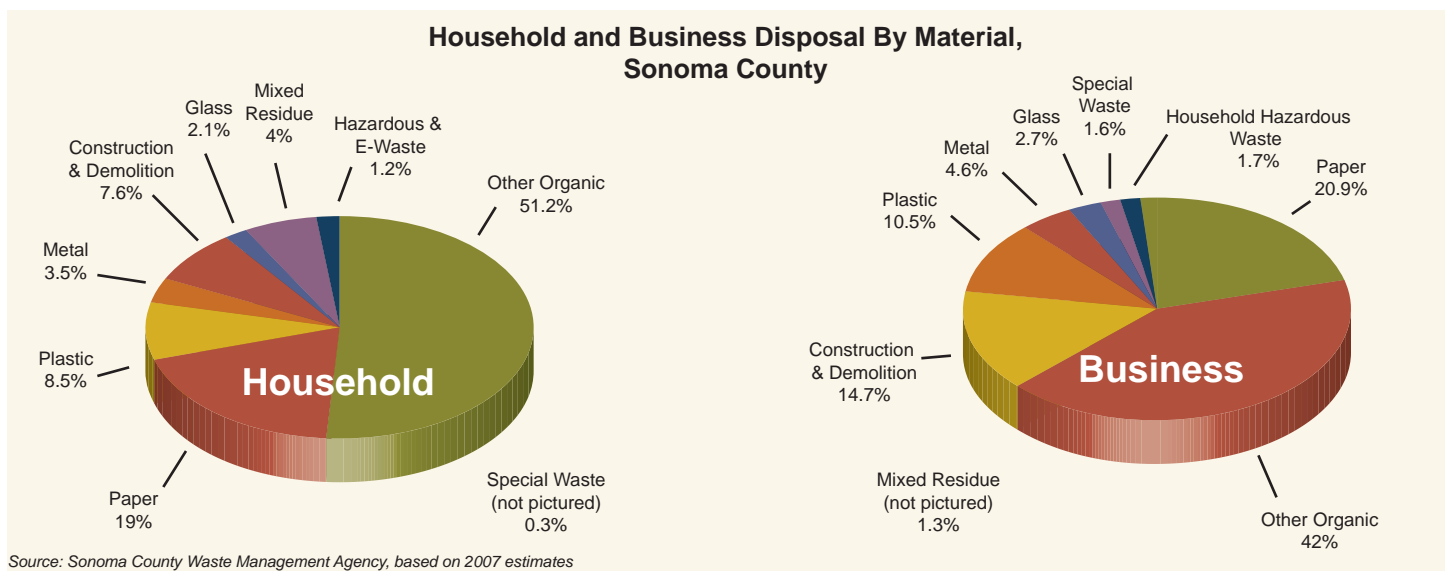
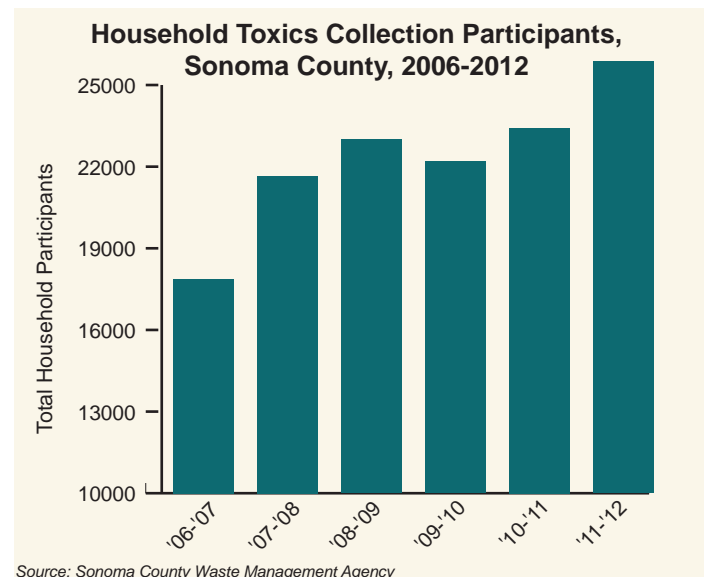
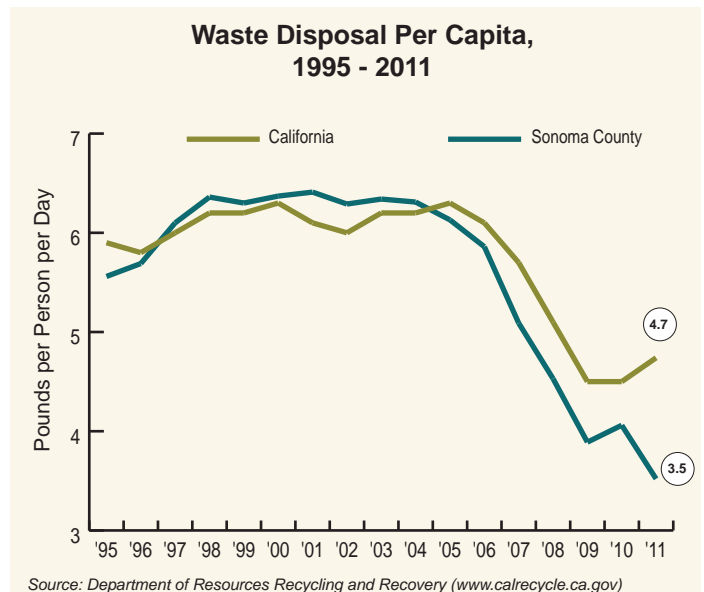
### How is Sonoma County doing?

**The number of residents participating in household toxics collection has increased by 45% since FY 2006-2007.** In 2005 the County of Sonoma constructed a new toxic disposal facility, which augmented local chemical storage and disposal capacity. Residential toxic disposal is a no-cost service offered through the Sonoma County Waste Management Agency and includes a permanent toxic disposal facility, household pickups (fee may apply) and free multi-location drop-off options. Proper toxic disposal is essential for keeping harsh chemicals out of local rivers and waterways, which are the main source for potable drinking water.

**Over the past four years, the county has substantially decreased its per capita waste disposal rate.** This is likely due to the ease and convenience of single-stream recycling, which allows residents to place all recyclable items in one bin. Single-stream recycling, in conjunction with a 50% state-mandated diversion law, has contributed to some wider diversion efforts

### Why is it important?

As a well-regarded agricultural and grape-growing region, it is important that Sonoma County businesses and residents continue to maintain the natural environment of the region. Excess use of toxic chemicals contributes to costly and involved clean-ups efforts. **Further, reducing the amount of waste and toxics in the county will contribute to a healthy population and help protect public health.**



# Health

## 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 and infirmity. Infant mortality rates, blood pressure levels, and frequency of doctor visits provide us a glimpse into the health of our county.

### How is Sonoma County doing?

Sonoma County infant mortality rates have not changed significantly over the time period but remain lower than the California rate. While the Sonoma County rate is below the California and national average, compared to other developed countries, our rate is high.

From 2007-2009 high blood pressure rates decreased, however 56% of those between the ages 65-79 are diagnosed with high blood pressure.

**Fifty-two percent of Sonoma County residents visit their doctor between one to three times a year.** This is consistent with the California average and shows the majority of Sonoma County residents visit their doctor regularly to maintain their health.

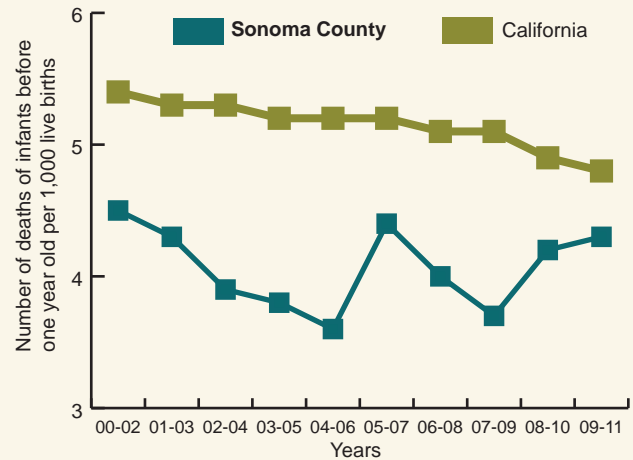
### Why is it important?

Infant mortality is used as an indicator to measure the health and well-being of a nation because economic, cultural, medical, and environmental factors that impact the national a whole also impact the infant population. An increase in infant mortality could indicate decreased utilization of prenatal care, health care, and family planning.

**High blood pressure is a major risk factor for heart disease and stroke, two of the leading causes of death in Sonoma County.** As well, high blood pressure can also contribute to heart attacks, heart failure, kidney failure, and blindness. Fortunately high blood pressure is preventable by eating a heart-healthy diet, limiting alcohol use, avoiding tobacco, and staying physically active.

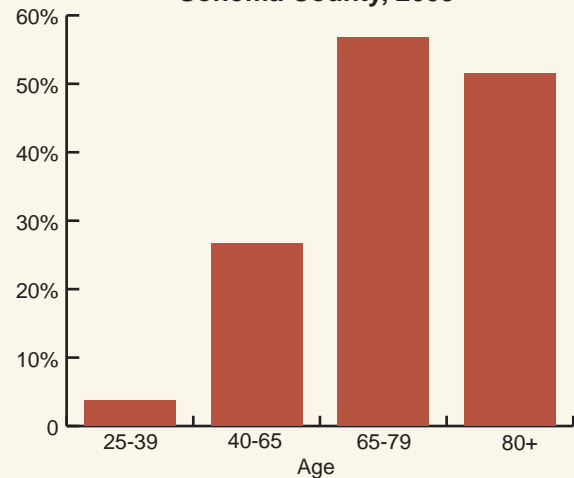
Visiting a doctor at least once a year is a vital part of maintaining good health. Those who frequently see a doctor and get routine check-ups are more likely to detect health problems early and prevent future problems from occurring.

**Infant mortality rate, 3 year moving average, Sonoma County and California 2000-2011**



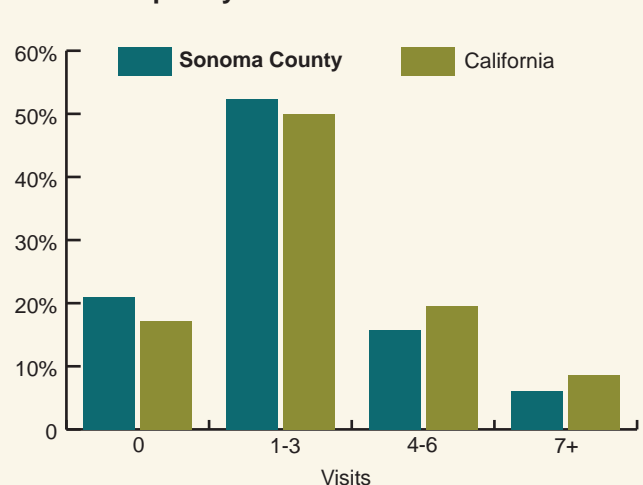
Source: California Dept of Health Services, Death Statistical Master Files 2000-11

**Adults with High Blood Pressure by Age, Sonoma County, 2009**



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

**Frequency of Doctors Visits in 2009**



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



## Youth Health Trends

### What is it?

Youth Alcohol and Other Drug (AOD) use is the percentage of youth who reported using any alcohol or drugs in the last 30 days. The Youth Engaged in Physical Activity chart features information about the rates of children ages 5-11 who are physically active at least one hour a day. Information included in the Teen Birthrates chart represents the number of births by females ages 15-19.

### How is Sonoma County doing?

In Sonoma County during 2008 and 2010 approximately 42.6% of 11th grade students in reported using alcohol or other drugs in the last 30 days. This is about 8% higher than the California average of 34%.

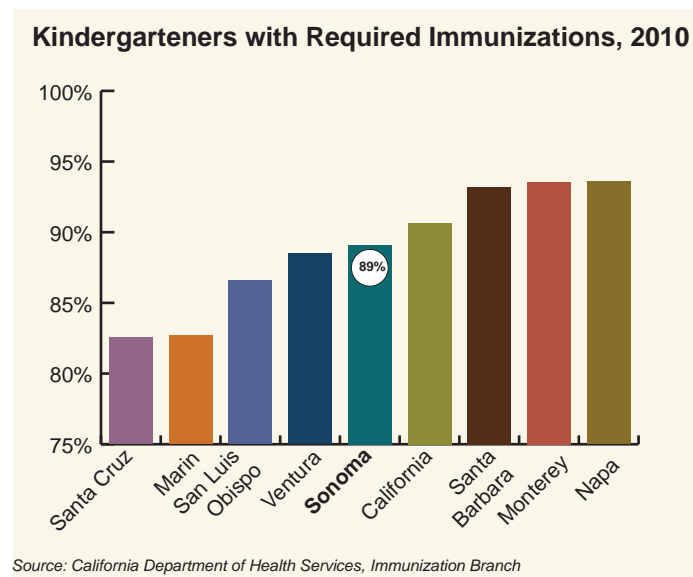
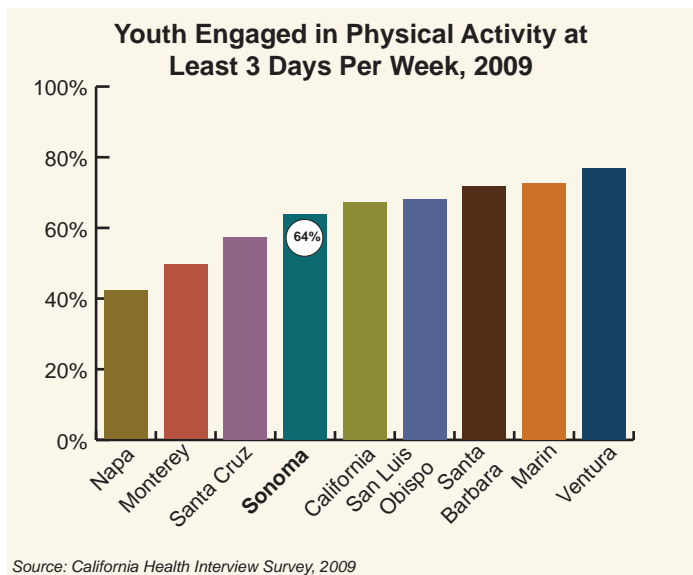
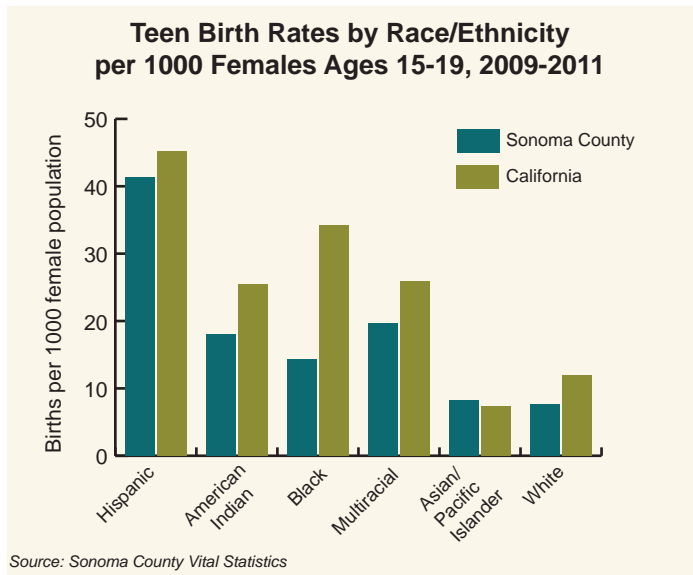
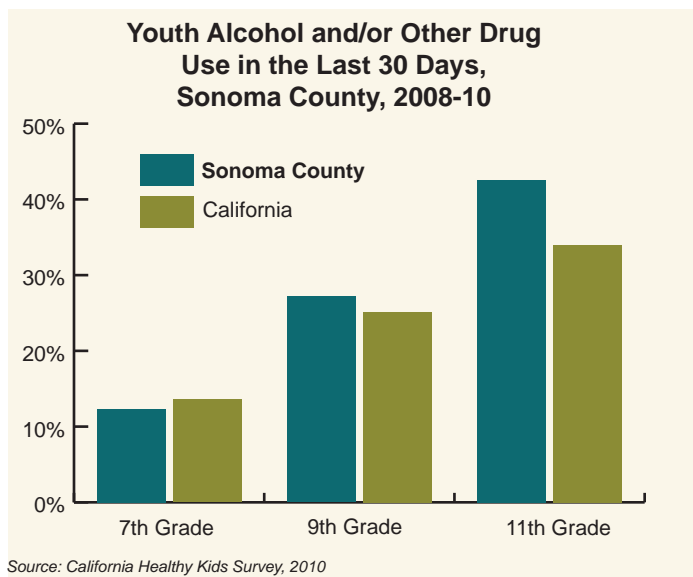
In 2010, nearly 90% of kindergarteners entered school with the required immunizations. Among other counties, Sonoma County has lower percentages of youth engaging in physical activity at least three times a week. Teen birth in Sonoma County is most prevalent among the Hispanic population.

### Why is it important?

Immunizations protect children from contracting communicable diseases that result in extended school absences, hospitalizations, and death.

Youth who are physically active during childhood are likely to be active as an adult. Being physically active helps build and maintain healthy bones and muscles. It also helps control and maintain weight, build muscle and reduce fat.

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.



# Health

## 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 by Type indicates the source of the health insurance that people have, or if they do not have health insurance. The number of physicians is an indicator of the availability of medical care to Sonoma County residents.

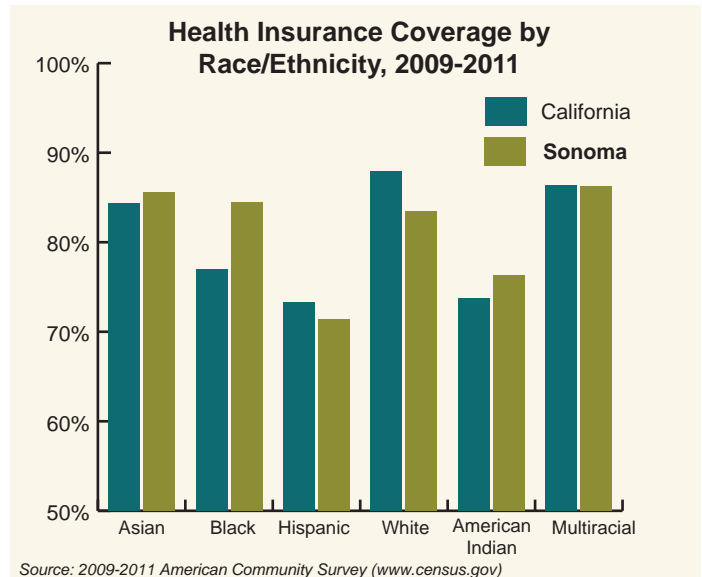
### How is Sonoma County Doing?

The California Health Interview Survey reported **86% of Sonoma County's population had health insurance in 2011**. By race, Asian, white, and multiracial populations were over 80% insured. Growing populations including Hispanics and American Indians show lower percentages of coverage than both the county and state average. **Sonoma County is above the California average percentage of people insured.** The supply of physicians in Sonoma County increased by approximately 10.6% from 1999 to 2010. Sonoma County fares better than California in its person-to-physician ratio

### Why is it important?

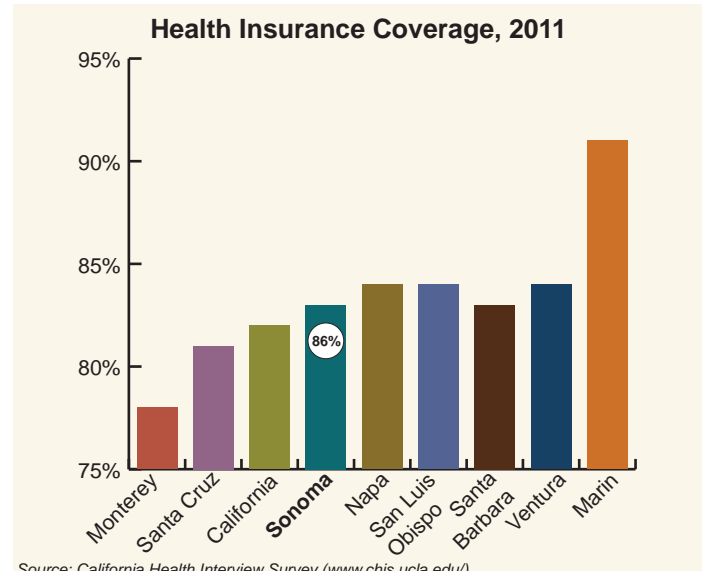
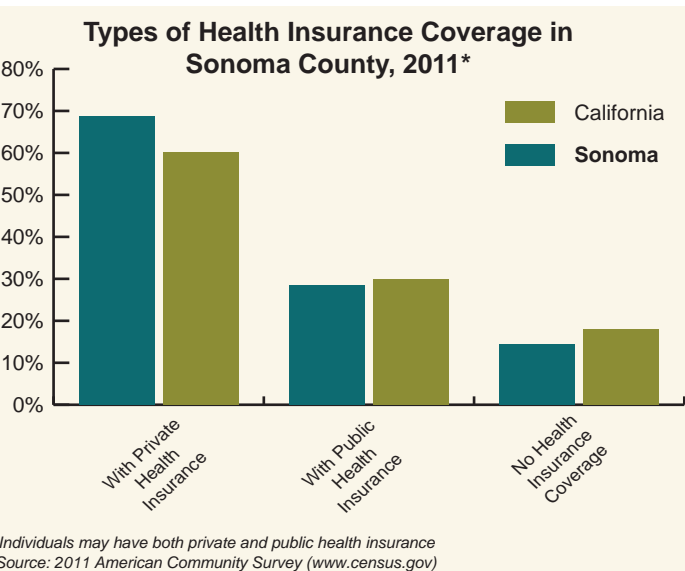
The uninsured are those who do not have health insurance coverage through private or public health insurance plans. Health insurance coverage is an important measure of access to health care. Uninsured individuals are less likely to receive appropriate services such as preventive care.

**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.**



Year	Sonoma Physicians	California Physicians	People/Physician Ratio - Sonoma	People/Physician Ratio-California
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
2005	1,365	94,546	348.3	387.9
2006	1,373	96,299	347.4	385.4
2007	1,357	97,878	353.5	383.7
2008	1,360	99,900	356.2	380.9
2009	1,321	98,816	351.4	367.4
2010	1,334	100,554	362.7	378.3

Source: Medical Board of California, Annual Report 2011



## Substance Abuse

### What is it?

Substance abuse is overuse or dependence on of alcohol and/or drugs which is detrimental to a person's health and well-being. Adult binge drinking is the percent of adults who reported consuming five or more drinks on one occasion in the last year. Youth alcohol reported use for California and Sonoma County is derived from surveying youth in grades 7, 9,11, and non-traditional students over a two-year period. Alcohol and drug-related hospitalization is defined as hospitalizations that occur as a result of AOD poisoning, mental disorder, and physical disease.

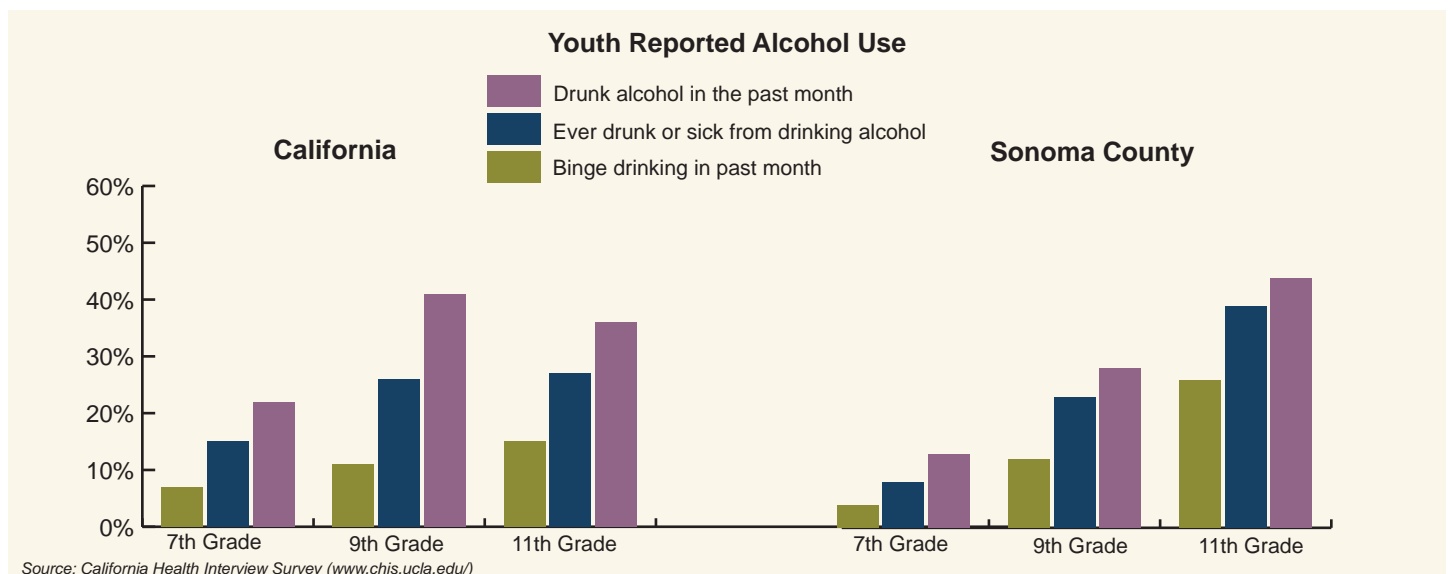
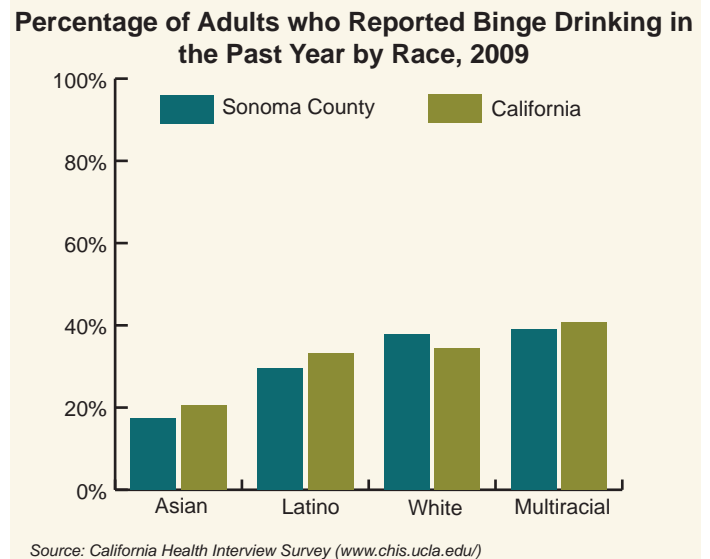
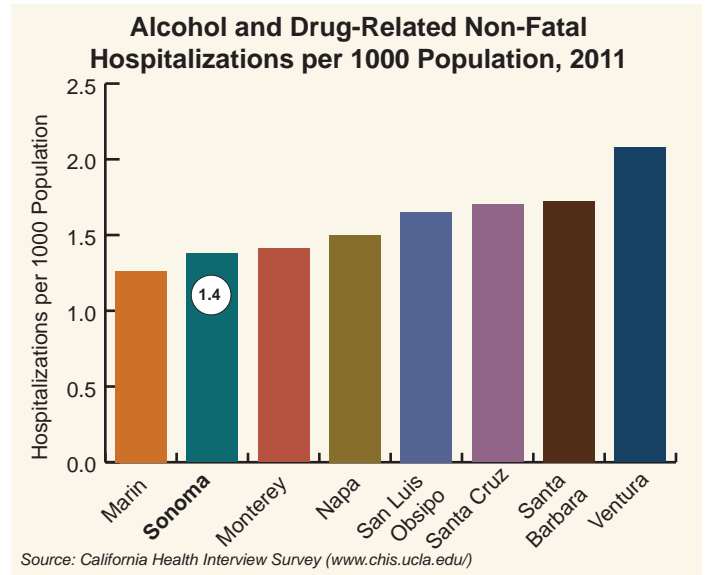
### How is Sonoma County doing?

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

**Sonoma County tends to have a lower percentage than California of adult binge drinkers among Asians, Hispanics, and Multiracials.** More than one-third of adults in Sonoma County binge drank in 2009, slightly over the state average. In 2011, Sonoma County had a alcohol and drug-related non-fatal hospitalizations rate of 1.4 per 1000 people.

### Why is it important?

Substance 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, and poor oral health.



# Health

## Leading Causes of Death

### What is it?

Leading causes of death measure the most common causes of mortality ranked by frequency of occurrence. Mortality rates refers to the number of deaths within a population and is represented as a ratio per unit of population, usually 100,000. Age-adjusted death rates allow for a fair comparison between groups, as they control for age variance within different populations.

### How is Sonoma County doing?

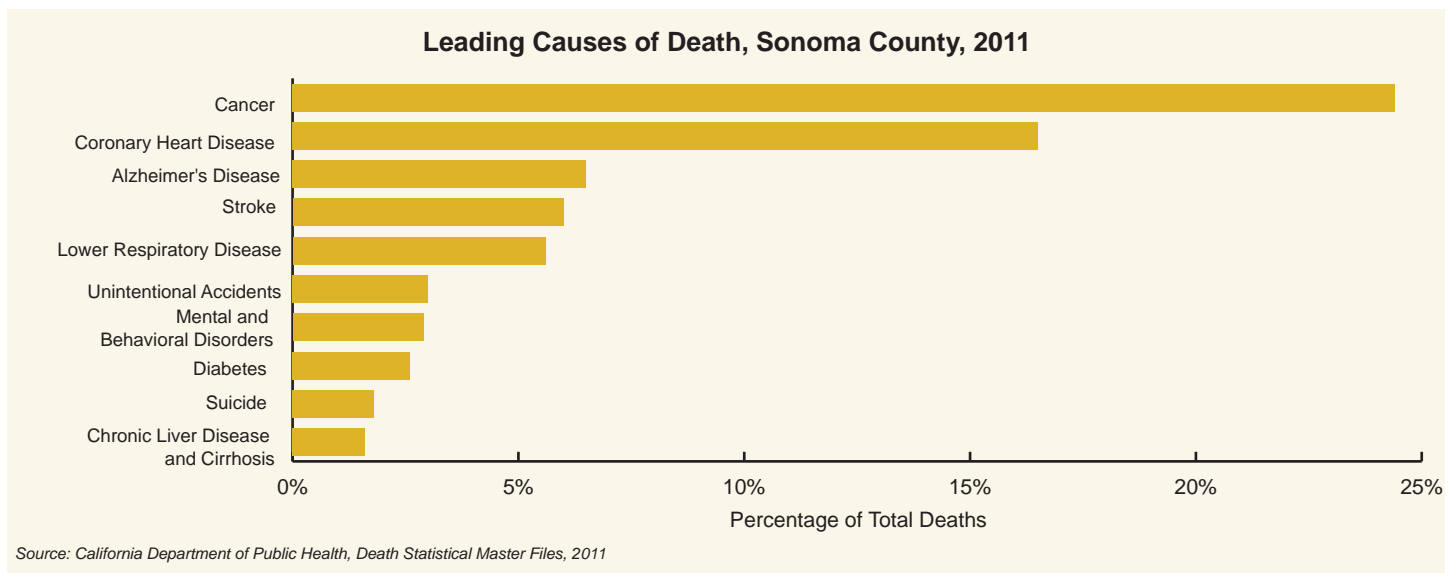
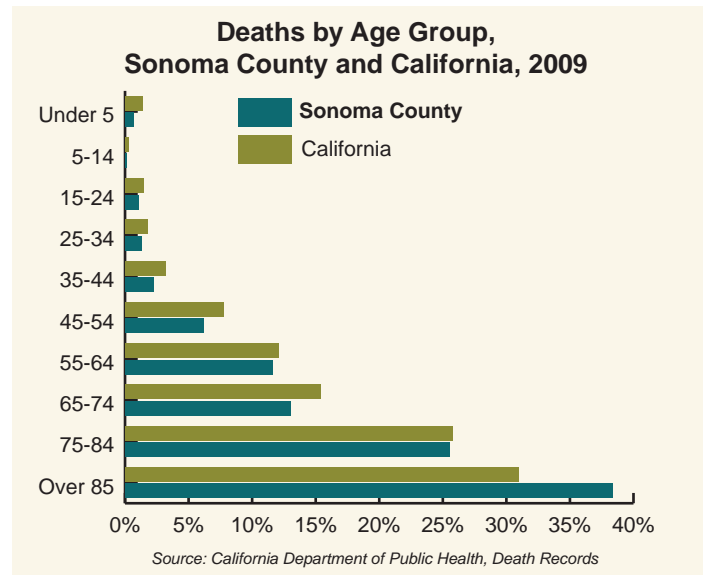
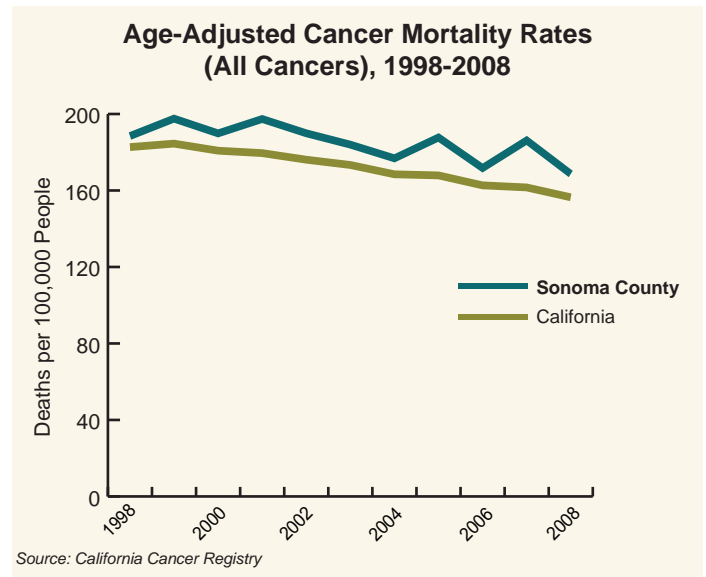
Chronic diseases are the leading causes of death for Sonoma County residents and cancer contributes to roughly one quarter of all incidences. **Between 1998 and 2008 the cancer mortality rate for Sonoma County never fell below the state average.** Yet even with high cancer mortality rates, Sonoma County has more residents who live beyond the age of 85 than the California average.

### Why is it important?

Leading causes of death data is useful for understanding the overall health and well-being of a population. It is also useful for determining policies and practices to address specific needs within a community.

Leading causes of death data for Sonoma County indicates a high percentage of deaths linked to chronic disease, some of which are preventable. Certain chronic diseases, such as stroke, heart disease and diabetes, are directly linked to overweight and obese populations. **In Sonoma County more than 50% of residents fall into one of these weight categories.**

In an effort to improve the general health of Sonoma County residents, the Board of Supervisors convened a health council in August 2007, Health Action. Successful Health Action programs include iWalk, iCare, iGrow, Food System Alliance, Safe Routes to School and Healthy Students.



Education

**What is it?**

The Sonoma County Office of Education oversees more than 70,000 K-12 students throughout Sonoma County. Over the past several years, enrollment has been decreasing which is consistent with statewide trends. In addition to the decrease in total enrollment, the demographic attributes of area students have been changing. There is an increase in Hispanic or Latino students and a decrease in white students. Additionally, nearly 45% of Sonoma County students are now eligible for free or reduced-price meals, which is indicative of household poverty.

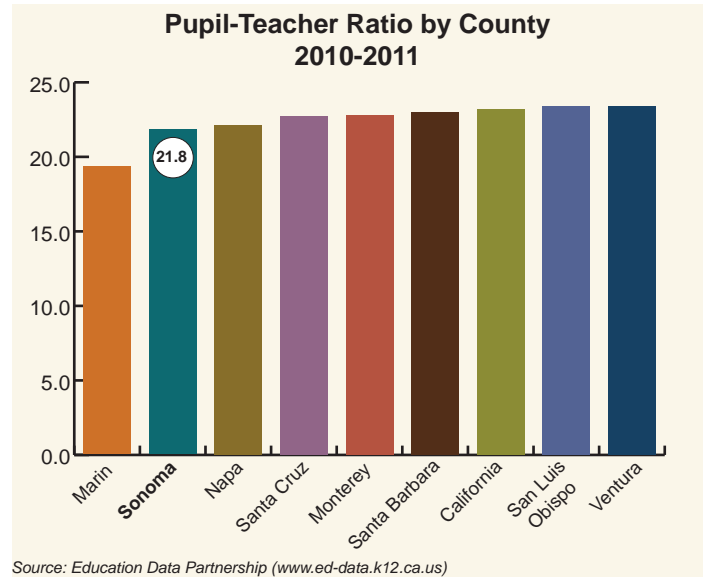
**How is Sonoma County doing?**

Sonoma ranks favorably among comparable counties with an K-12 average pupil:teacher ratio of 21.8:1. **However, Sonoma County has one of the highest dropout rates of comparable counties.** On a positive note, there was a downward trend in dropouts from 2008 to 2011, where the dropout rate decreased from 5.8% down to 4.1%. Sonoma County dropout rate still remains higher than comparable counties but lower than the state dropout rate.

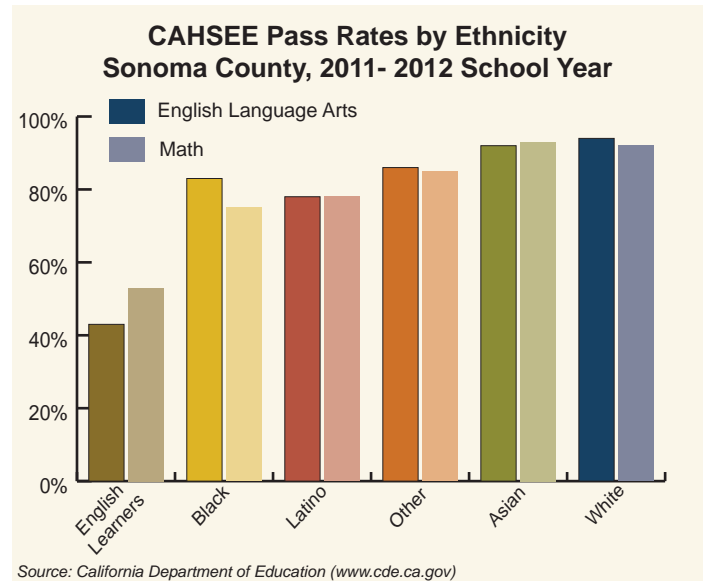
**Additionally, California High School Exit Exam (CAHSEE) Pass Rates suggest that an achievement gap exists among different ethnic groups in Sonoma County.**

**Why is it important?**

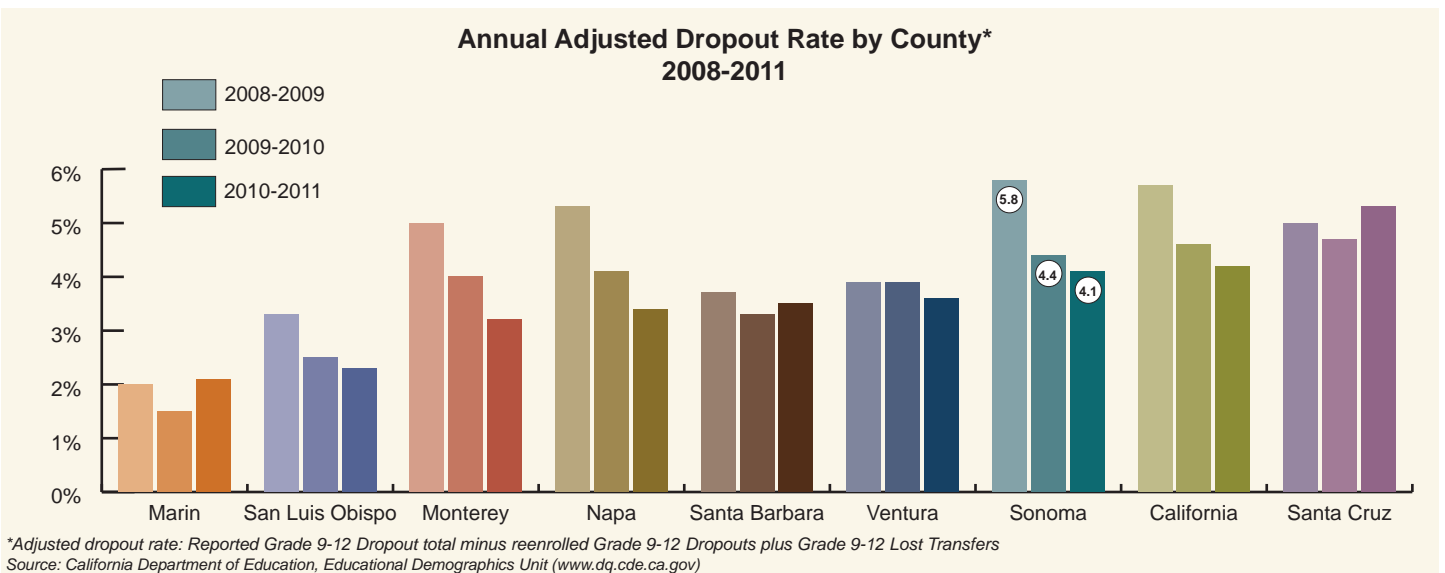
High school dropout rates are an important indicator of the value of education to Sonoma County youth and their families. It also indicates the ability of area schools to provide for the broad spectrum of educational needs. The pupil: teacher ratio and CAHSEE pass rates give a good indication of the quality of education within the county.



Source: Education Data Partnership (www.ed-data.k12.ca.us)



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



\*Adjusted dropout rate: Reported Grade 9-12 Dropout total minus reenrolled Grade 9-12 Dropouts plus Grade 9-12 Lost Transfers  
Source: California Department of Education, Educational Demographics Unit (www.dq.cde.ca.gov)

# Society

## Education

### What is it?

**Educational attainment within the county's population can be indicative of the future economic vitality in the county.** Higher education enrollment indicates the number of people in the county currently seeking a degree. Educational attainment indicates the educational status of the current population. The Scholastic Aptitude Test (SAT) is a standardized test that measures the verbal, math and writing skills of high school students seeking college admission.

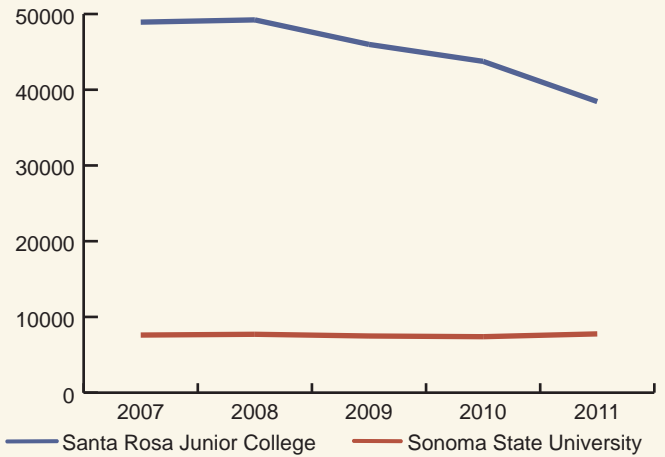
### How is Sonoma County doing?

While there was a decrease in higher education enrollment, the number of students attending college in Sonoma County still remain high at approximately 46,000. **The educational attainment of the county is also high, with about 32% of the population having at least bachelor's degree and 87.4% having at least a high school education.** College-bound high schoolers are also doing well on writing, critical reading and math SATs. The average scores are either the second or third highest among comparable counties. This indicates that of students showing an interest in higher education, their SAT scores indicate they are comparably equipped to do us.

### Why is it important?

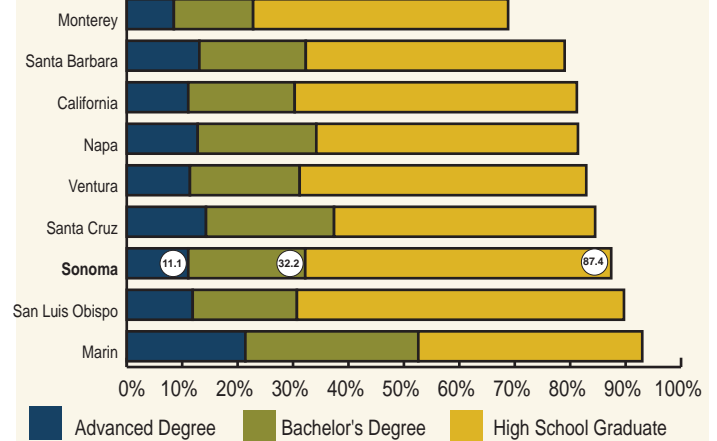
**A strong education system and an educated population make a region more attractive for business and individual relocation, as it increases the quality of the labor pool.** The SAT helps indicate how ready college-bound students are. The higher education enrollment in the local area also gives an indication about the future educational attainment that can be expected in Sonoma County. Educational attainment and quality is a key indicator of future economic vitality.

Higher Education Enrollment, 2007-2011



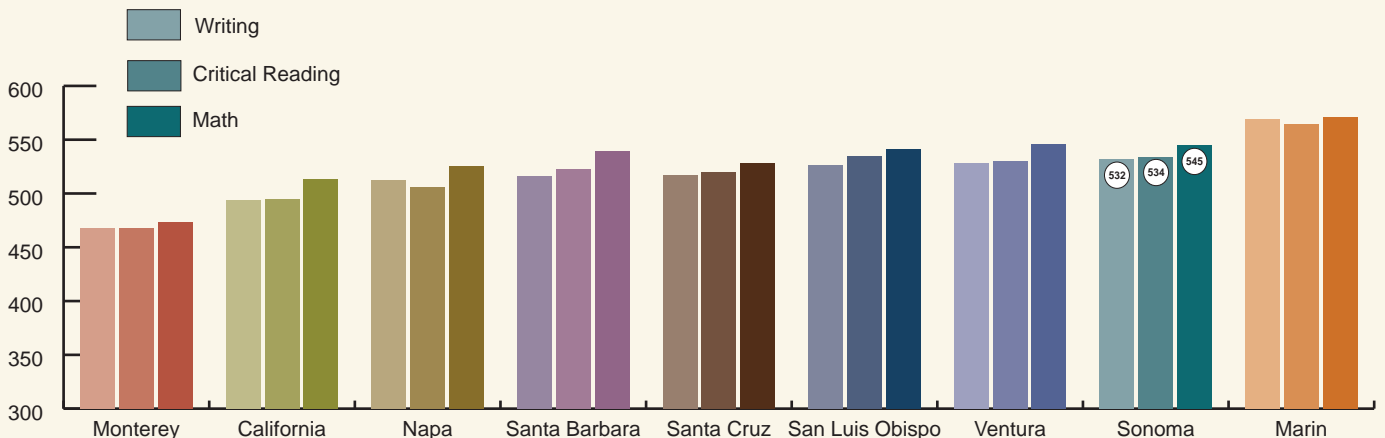
Sources: The California State University ([www.calstate.edu](http://www.calstate.edu))  
California Community Colleges Chancellor's Office ([www.datamart.cccco.edu](http://www.datamart.cccco.edu))

Education Attainment by County, 2011



Note: High School Degree includes Associates Degree and some college, no degree.  
For example: 87.4% of Sonoma County residents have at least a high school education  
Source: U.S. Census, American Community Survey ([www.census.gov/acs](http://www.census.gov/acs))

SAT Writing, Reading and Math Scores by County, 2011



Source: California Department of Education ([www.cde.ca.gov](http://www.cde.ca.gov))



## Demographics

### What is it?

Demographics are selected indicators that characterize a community. **Common demographic indicators include population size, natural changes in population size, age make up and ethnic distribution.** Knowledge about an area's population is crucial to determine workforce and education needs and to help inform policy decisions.

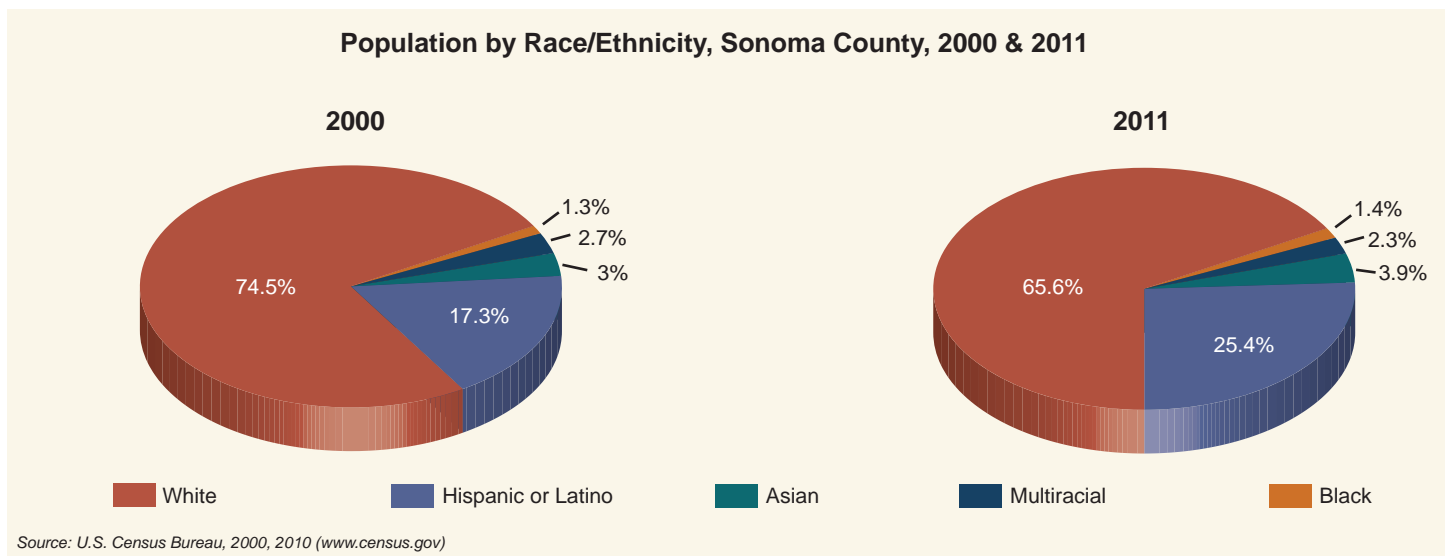
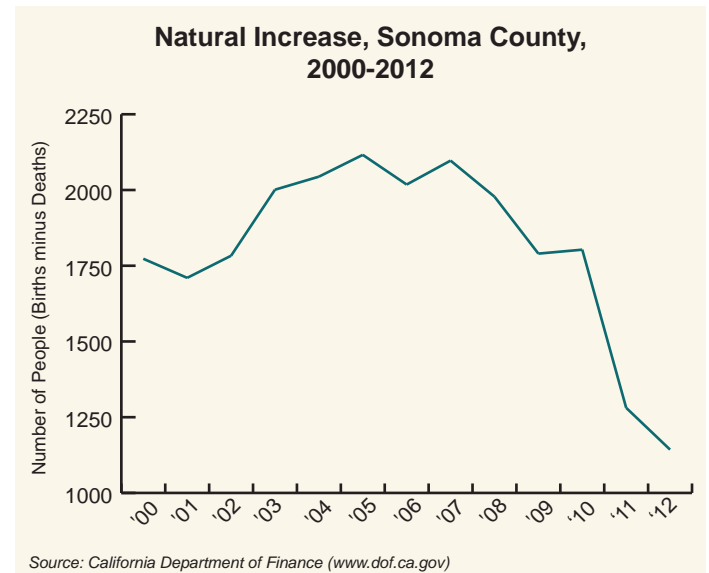
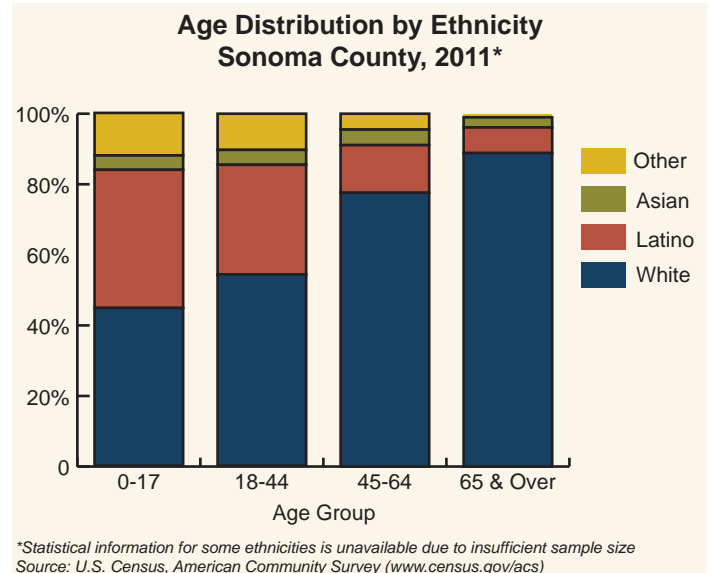
### How is Sonoma County doing?

**Sonoma County has a rapidly growing young Hispanic population and an aging white population.** However, white residents still make up the majority of people in all of the four age groups. Asians and people who have chosen to be classified as 'other' have a very small variation across the age groups. Overall, Sonoma County's population is becoming more diverse with the ethnic makeup of the county shifting to become more Hispanic.

### Why is it important?

**Age distribution and ethnic make up can help us pinpoint what public resources will be necessary.** Recent industry cluster research suggests that education and health care will be high growth industries in the next decade.

The natural increase of a population, calculated by the number of births minus number of deaths in a given year, is an indicator of a region's ability to grow its population naturally. **The natural increase can help us analyze if changes in the health care or education industries are necessary to support the change the population's age make up.**



# Society

## Crime and Safety

### What is it?

These indicators ascertain the safety of Sonoma County compared across counties and over time. All data is collected by the California Department of Justice and the Sonoma County Sheriff's Office. Crime rates are measured by the number of crimes committed per 100,000 residents. Violent crime includes homicide, forcible rape, robbery, and aggravated assault. Property crime includes burglary, motor vehicle theft, and larceny (theft over \$400). While crime rate indicators assess the instances of crime, the indicator for arrests per 100,000 residents reflects the ability of the police force to apprehend offenders.

### How is Sonoma County doing?

**Both violent crimes and property crimes have been gradually decreasing over the past six years, indicating growing safety in the county.** Among comparable counties, Sonoma boasts the lowest property crime rate, with only 847 property crimes per 100,000 residents in 2010. Sonoma also posts a lower rate of violent crime than many of its neighbors. The 379 registered violent crimes per 100,000 residents places Sonoma County in the respectable middle of comparable counties and well below the state average of 422 crimes per 100,000 residents.

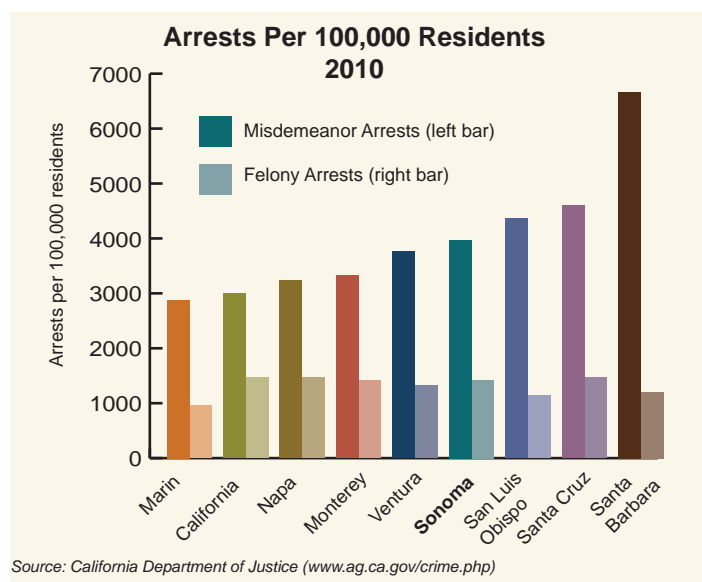
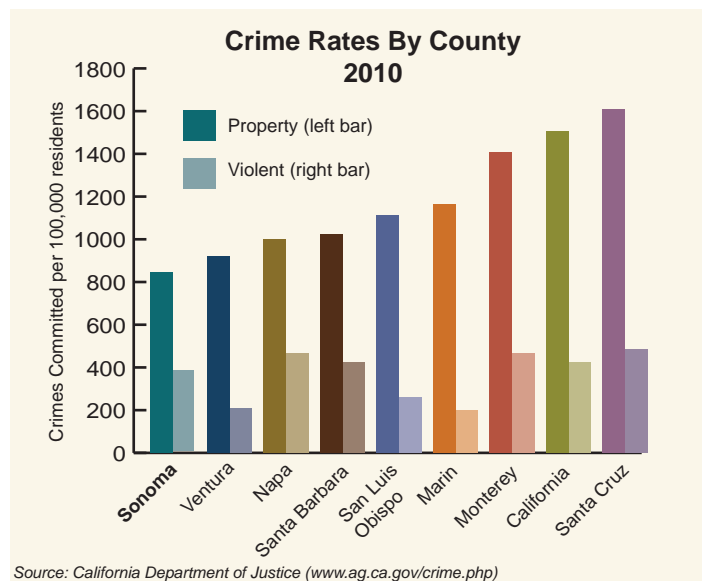
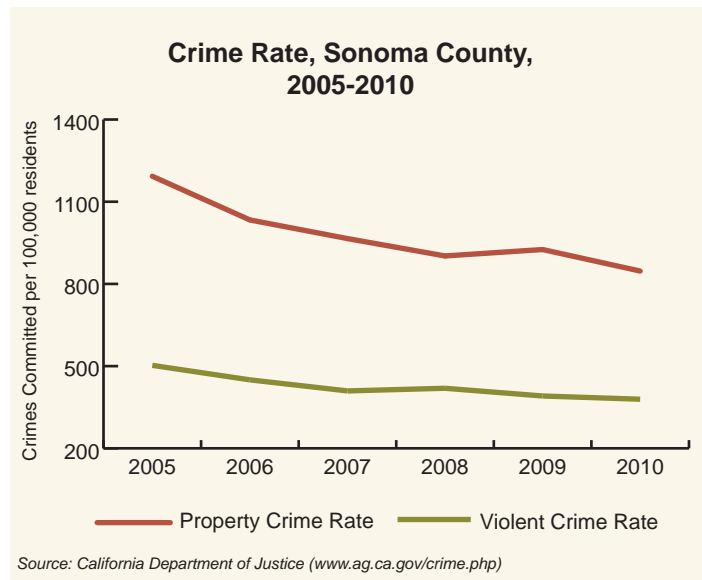
**In terms of policing power, Sonoma County ranks solidly among its peer counties in arrest rate statistics with 3,972 misdemeanor arrests per 100,000 residents in 2010.**

Sonoma County residents are also willing to pay for their increasing safety. Sonoma County spent \$304 million on public safety in Fiscal Year 07-08, the last year for which data was available. About one-third those expenditures were for police departments, not including the Sheriff's Office of Sonoma County. In comparison, Santa Cruz County spent only \$130 million, and Ventura County, which boasts only slightly lower property crime rates than Sonoma, spent \$542 million.

### Why is it important?

**Criminal activity negatively impacts a region's quality of life and rising crime rates also correlate with rising costs for both the public and private sectors.** In 2007-08 Sonoma County residents spent over \$800 per capita in federal, state and local taxes to finance criminal justice processes, not including law enforcement costs. Fortunately, Sonoma County's crime is declining, bolstering quality of life measures.

*Sonoma County's property crime rate decreased by 18% since 2006, and violent crime decreased by 15%.*



## Housing

### What is it?

Housing affordability is a major factor for many families looking to relocate to Sonoma County. The Housing Affordability Index offers the percentage of households who can afford to purchase the median home price in a given region. The HAI is the most common measure of housing well-being for first-time buyers in California. The median home price indicator is the middle of the range of home prices for a given month in the county. Similarly, the fair market rent indicator also ascertains affordability by examining rental properties for efficiency and two-bedroom apartments. Efficiency apartments are classified as an apartment in which one room typically contains the kitchen and living quarters, with a separate bathroom.

### How is Sonoma County doing?

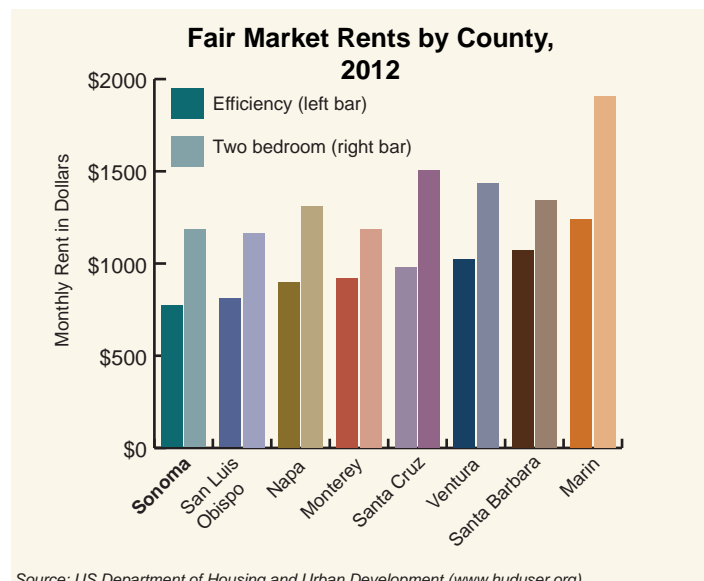
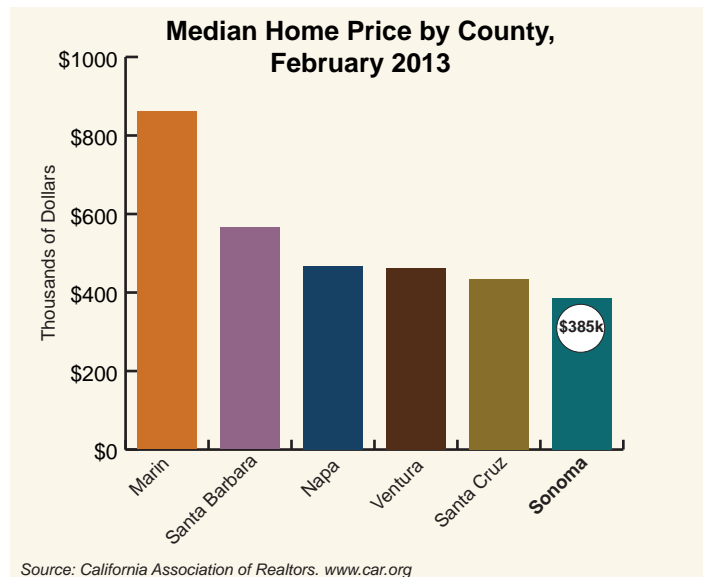
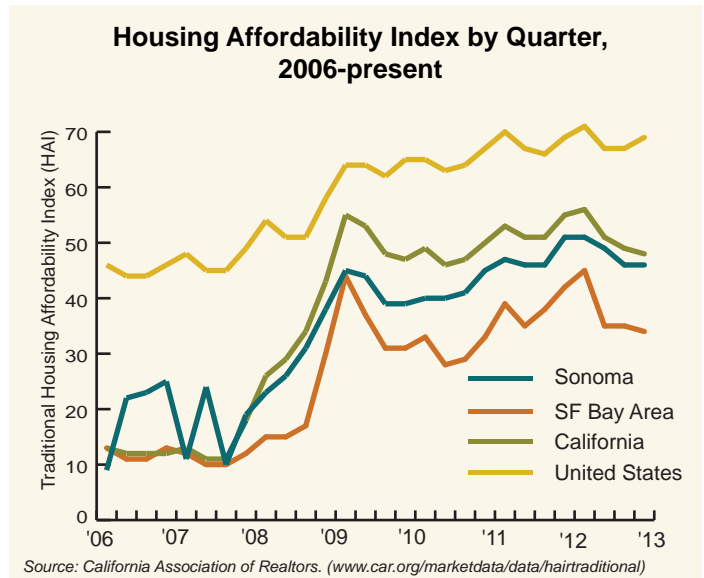
**Currently, Sonoma County's median home price places it among the more affordable comparable counties**, with a median price of \$385,000 in February 2013. That price is a 22% increase from the 2011 median price, a fairly average increase when compared to similar comparable counties.

The housing market for Sonoma County reached its lowest point in 2011 for construction permits for single-family residences and multifamily residences and also a lowest point for existing-home prices. Moody's Analytics reports that the total peak-to-trough decline in the median house price was approximately 45%—17 percentage points larger than the U.S. decline but close to the state's 47% drop. There is an unclear trend regarding the future of the Sonoma County housing market. According to Moody's, a reduction in the number of unsold existing homes will continue to lift housing prices, but permits for new residential construction has yet to increase.

**Sonoma County remains fairly affordable for efficiency renters. An efficiency apartment averaged \$767 a month, the lowest among comparable counties, and a two-bedroom apartment would cost a renter an average of \$1,178 per month, the second lowest rate among those counties.** Rents region-wide are expected to rise as the housing market begins to gain steam.

### Why is it important?

Sonoma County citizens have long prided themselves on the superb quality of life offered in their community. Affordable housing reduces traffic congestion, lowered productivity, and decreases pollution by allowing the workforce to commute locally. High relative prices may both force businesses to relocate out of the county and discourage young families from discovering Sonoma's offerings.



# Tourism

## Destination Spending

### What is it?

Destination spending is the amount of money visitors spend 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?

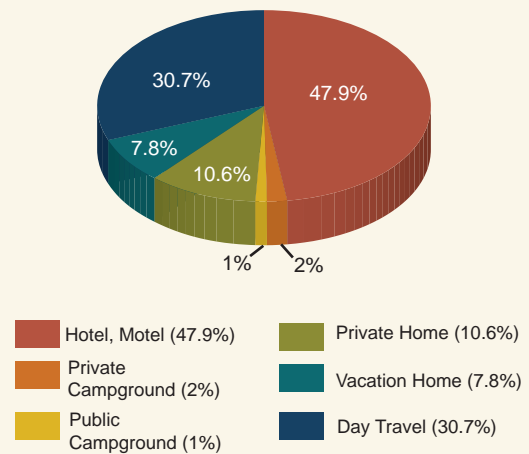
**Sonoma County had the third largest destination spending among comparable counties in 2011.** The value of destination spending in Sonoma County in 2011 was \$1.47 billion. This is an 8% increase in total destination spending from 2010. This increase in spending reflects Sonoma County's popularity as a tourist destination and that the tourism sector of the economy returning to prerecession levels. All of the comparable destinations also experienced an increase in destination spending.

**The relative stability of the demand for wine, improved air service to Sonoma County, and the increase in international tourism because of increased affordability due to the weak dollar, will continue to strengthen the tourism industry in Sonoma County as the economy recovers.** These factors, as well as the proximity to the Bay Area, help maintain tourist flow and destination spending strength.

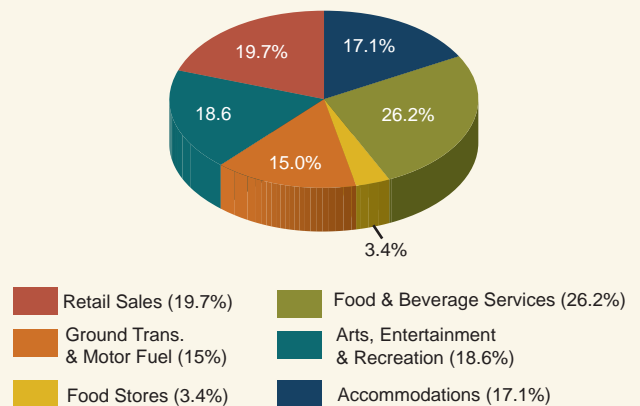
### Why is it important?

**The destination spending by leisure and business travelers increases Sonoma County's financial capital and also benefits a variety of industries throughout the county.** The billion dollar tourism industry generates revenues for both the public sector, through local and state taxes, and the private sector, through the creation and support of local employment.

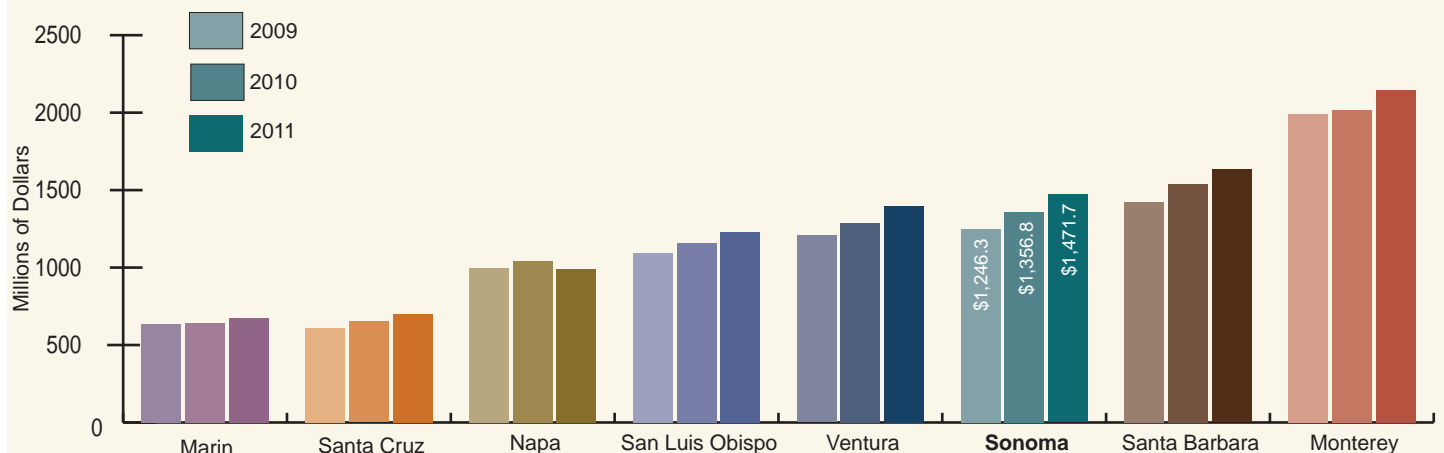
**Distribution of Visitor Spending By Type of Traveler Accommodation, Sonoma County, 2011**



**Distribution of Visitor Spending by Commodity Purchased, Sonoma County, 2011**



**Destination Spending by County, 2009-2011 (Millions of Dollars)**



Source All: California Travel Impacts by County, 2011. Prepared for the California Travel and Tourism Commission by Dean Runyan and Associates, May 2013

## Industry Employment

### What is it?

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

### How is Sonoma County doing?

**Tourism employment accounted for 9% of total employment in Sonoma County in 2011.** This is equal to 16,910 jobs in the county. This indicates that Sonoma County has more tourism-related jobs than all other comparable destinations.

Workforce health is reliant on discretionary spending and is therefore sensitive to the recession. The change from 2010 to 2011 in the number of tourism jobs in the county was 2.3%. This indicates that Sonoma County gained 380 tourism sector jobs from 2010 to 2011. **Sonoma County's tourism sector grew the second-fastest in jobs compared to competitive destinations.** Only Marin had a higher growth rate in tourism sector jobs at 5.2% from 2010 to 2011.

The majority of tourism jobs are found in accommodations and food service sector (51.9%), followed immediately by jobs in the arts, entertainment and recreation sector (38.3%). While the difference between the number of jobs in each sector is negligible, this is a slight change from previous years where the majority of tourism jobs were in the arts, entertainment and recreation sector.

### Why is it important?

**The \$1.47 billion tourism industry is a vital part of Sonoma County's economy.** The industry is comprised of accommodation establishments, food and beverage services, transportation providers, arts and entertainment recreation, retailers and is a key component for many companies in numerous industries. Destination spending represents a considerable percentage of revenue for local companies sustaining and providing local jobs.

*Tourism and destination spending generated 16,910 jobs in 2011.*

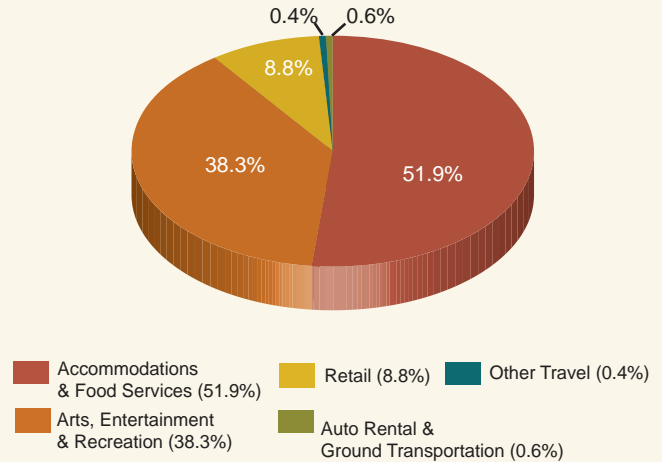
### For More Information

California Travel and Tourism Commission ([www.VisitCalifornia.com](http://www.VisitCalifornia.com))

Sonoma County Tourism ([www.SonomaCounty.com](http://www.SonomaCounty.com))

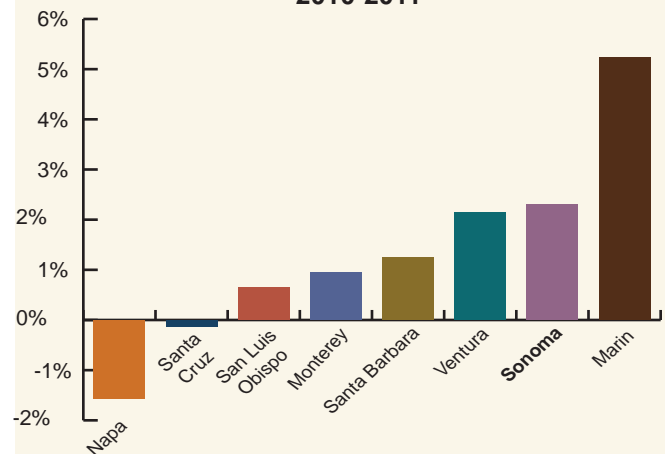
Sonoma County Economic Development Board ([www.SonomaEDB.org](http://www.SonomaEDB.org))

Tourism Workforce by Sector, 2011



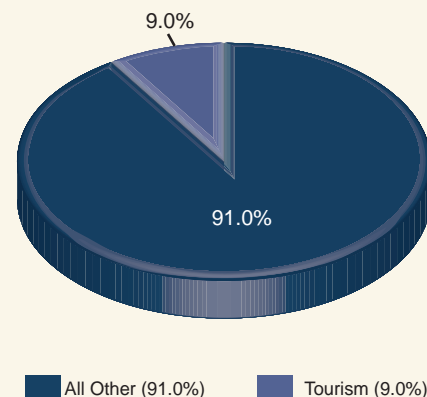
California Travel Impacts by County 1992-2011, Dean Runyan Associates May 2013

Annual Percentage Change in Tourism Employment, 2010-2011



California Travel Impacts by County 1992-2011, Dean Runyan Associates May 2013

Tourism Percentage of Total Sonoma County Workforce, 2011



California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov))

# Tourism

## 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 to gauge the health of the local hotel and tourism industry. The occupancy rate of a hotel is the percentage of available 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.

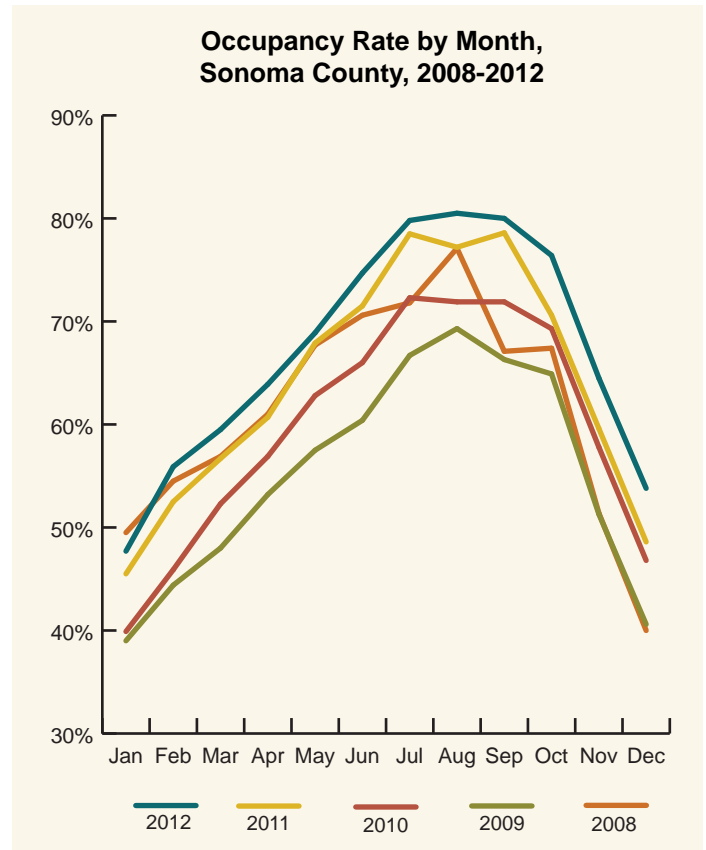
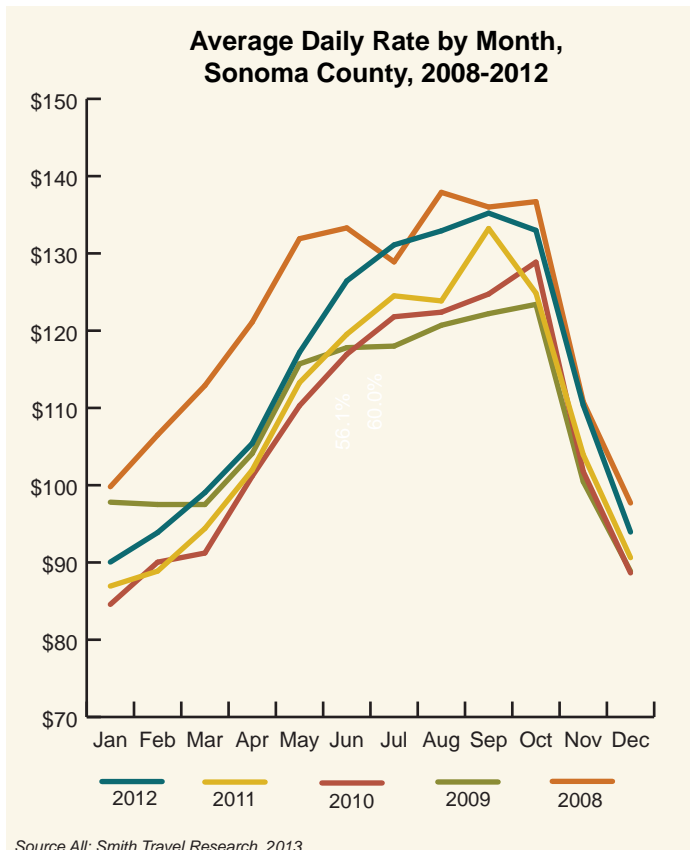
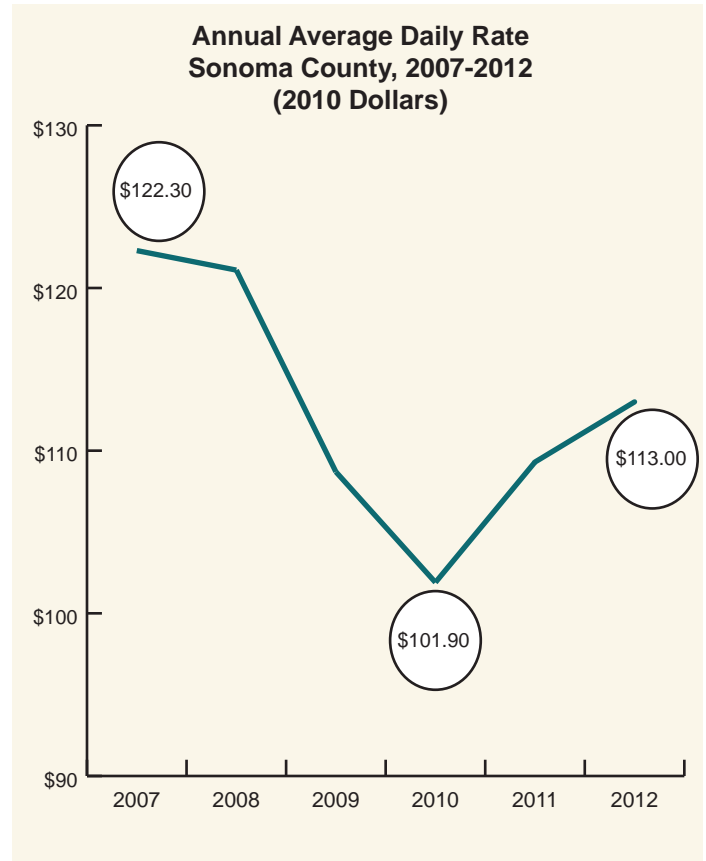
### How is Sonoma County doing?

The average daily rate (ADR) grew in 2012 to \$113, a 3.4% increase from 2011. Comparable counties in California have experienced a similar increase in the average daily rate from 2011 to 2012. Early 2013 data suggests that ADR continues to stabilize.

**At 63.8%, occupancy rates in Sonoma County increased 3.9% in 2012 from 2011.** Preliminary results for 2013 suggest that the Sonoma County's lodging industry is returning to levels seen prior to the 2007-2008 recession as average daily rate and occupancy rates continue to increase.

### Why is it important?

Visitors that stay 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 a variety of businesses.



Source All: Smith Travel Research, 2013



## Tourism-Related Taxes

### What is it?

Destination spending by day and overnight visitors generates a significant portion of taxes paid to state and local governments. 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. **TOT receipts indicate the level and distribution of travel-related economic activity in Sonoma County.** Because they are unrestricted funds, they are eligible for any legitimate public expense, as directed by city councils and the Sonoma County Board of Supervisors.

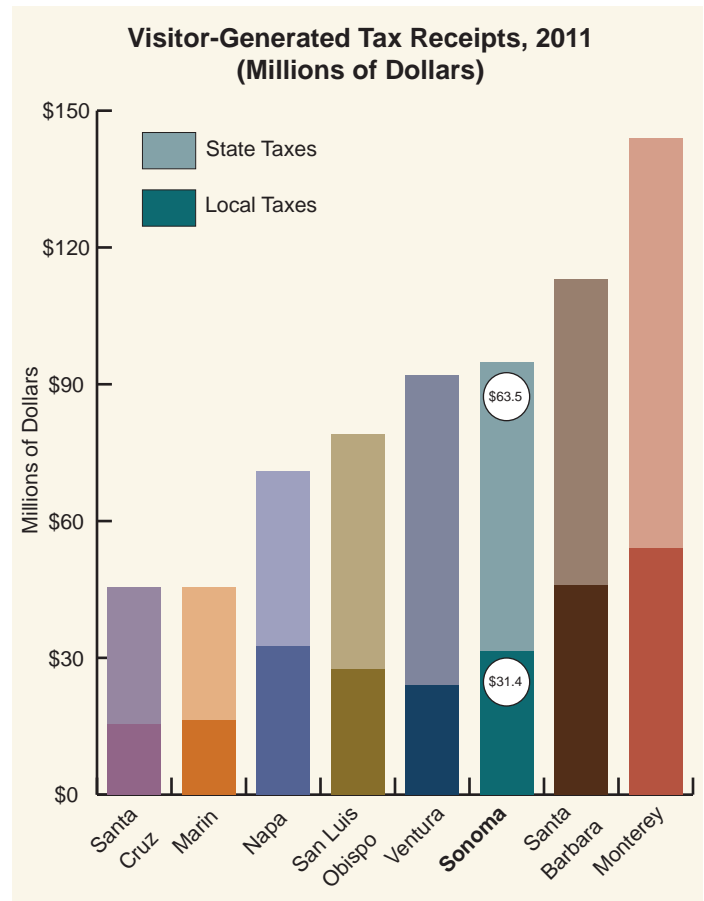
### How is Sonoma County doing?

**Between fiscal years 2002 and 2012, total TOT collected grew 71% percent from \$13.1 million to \$22.4 million.** TOT revenues peaked in 2007 and all comparable counties experienced a decrease in TOT revenues with the economic downturn. Despite this downturn, TOT revenues for Sonoma County in 2012 are the highest they have ever been.

Total visitor generated local taxes, including TOT, in 2011 were an estimated \$31.4 million. Visitor-generated tax receipts create a source of revenue for the state, contributing approximately \$63.5 million in 2011. Together, state and local taxes generated by visitors totaled \$94.9 million in 2011. Sonoma County is ranked third in comparable counties for visitor generated tax receipts.

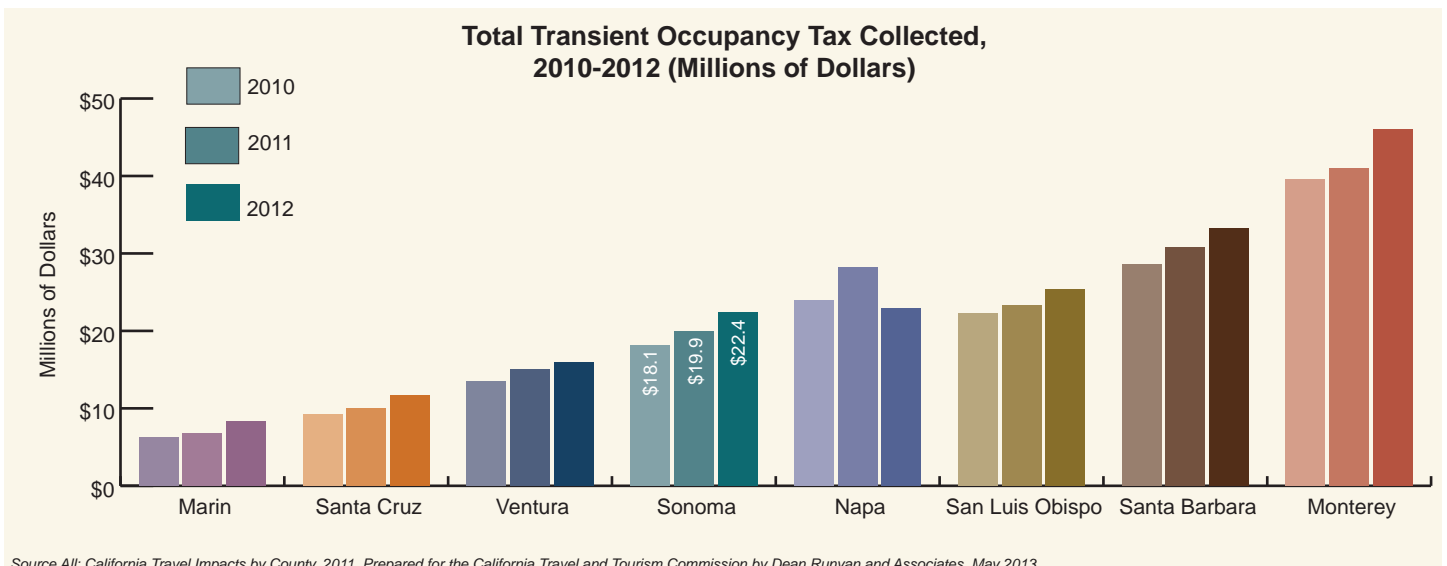
### Why is it important?

**Tourism is a significant source of tax revenue for local governments, with visitor-generated tax revenue currently making up almost 19% of total local tax receipts.** The County government allocates a significant portion of this revenue to finance advertising and promotional activities in Sonoma County.



### For More Information

- California Travel and Tourism Commission ([www.VisitCalifornia.com](http://www.VisitCalifornia.com))
- Sonoma County Tourism ([www.SonomaCounty.com](http://www.SonomaCounty.com))
- Sonoma County Economic Development Board ([www.SonomaEDB.org](http://www.SonomaEDB.org))



Source All: California Travel Impacts by County, 2011. Prepared for the California Travel and Tourism Commission by Dean Runyan and Associates, May 2013

# Tourism

## 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?

**Total industry earnings by travel spending in 2011 were \$442.7 million.** This is a 4.9% increase from 2010. All comparable destinations experienced increases in industry earnings except Santa Cruz, with Sonoma County experiencing the largest percentage increase.

Industry earnings generated by tourism spending increased 41.5% from 2001 (unadjusted for inflation). This increase places Sonoma County behind only Napa in largest-percentage increase in industry earnings. However, when put into the perspective of earnings-per-industry job, Sonoma drops to the respectable middle of comparable counties. The growth in destination spending and industry earnings should help close the gap in earnings-per-employee as Sonoma County emerges from the recession.

All Sonoma County industry sector earnings increased from 2010 to 2011, with the exception of "Other Travel" and "Air Transportation". These increases show that tourism spending is returning to Sonoma County following the drops seen during the 2008-2009 recession.

### Why is it important?

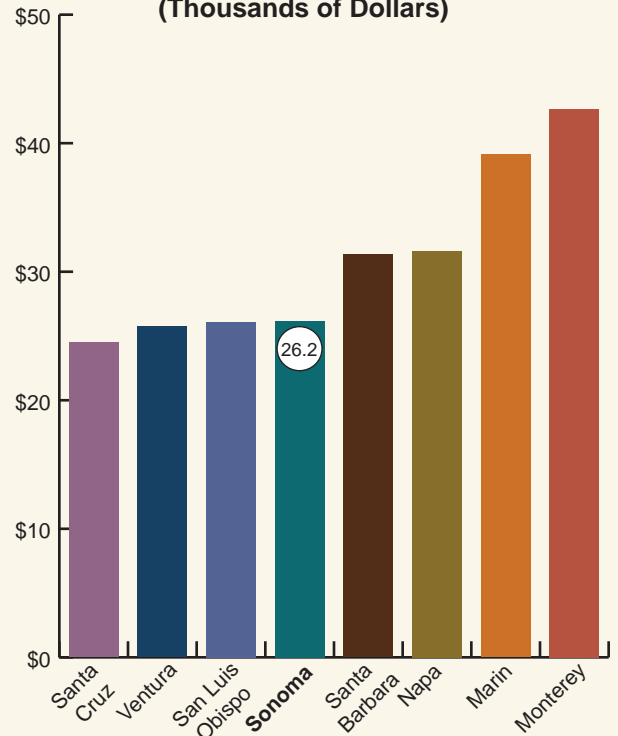
Visitors traveling to Sonoma County generate revenue and jobs in local tourism related businesses through destination spending. **This revenue spills over to improve the overall economy.** Substantial growth in high-revenue and in previously underperforming industries are promising long-term indicators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

### Sector Earnings Generated by Travel Spending, Sonoma County, 2010-2011 (Millions of Dollars)

Industry	2010	2011	% Change
Accommodations & Food Service	241.7	253.3	4.80%
Arts, Entertainment & Recreation	129	137.7	6.74%
Retail*	42.9	45.3	5.59%
Auto Rental	3.4	3.5	2.94%
Air Transportation**	0.0	0.0	0.00%
Other Travel***	4.6	2.9	-36.96%
<b>Total</b>	<b>421.7</b>	<b>442.7</b>	<b>4.98%</b>

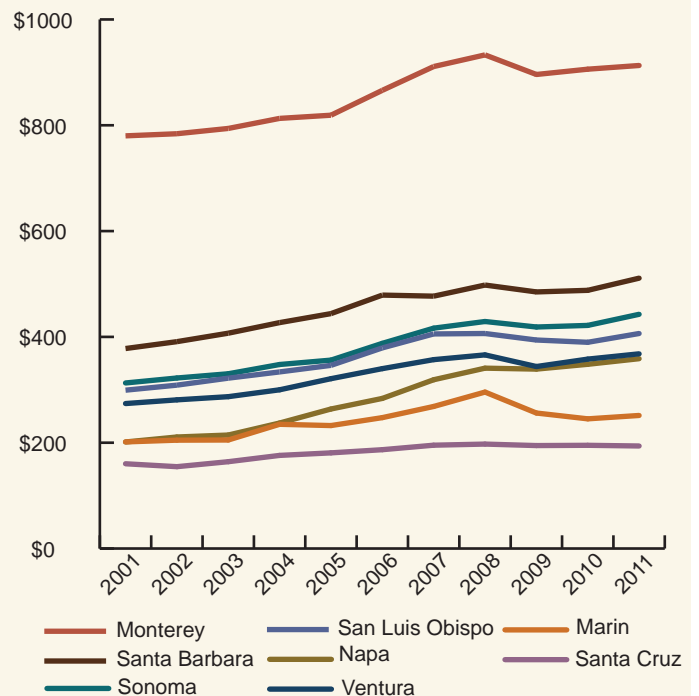
\*Includes gasoline \*\*Visitor Only \*\*\*Includes resident air travel and travel agencies

### Industry Earnings per Tourism-Related Job by County, 2011 (Thousands of Dollars)



Source All: California Travel Impacts by County, 2011. Dean Runyan and Associates, May 2013

### Total Industry Earnings Generated by Travel Spending, 2001-2011, (Millions of Dollars)



Workforce Trends

**What is it?**

Workforce Trends provide information on Sonoma County's residents and their employment characteristics, such as length and type of employment as well as location of employment. Additionally, information regarding the age distribution of local residents is also presented.

**How is Sonoma County doing?**

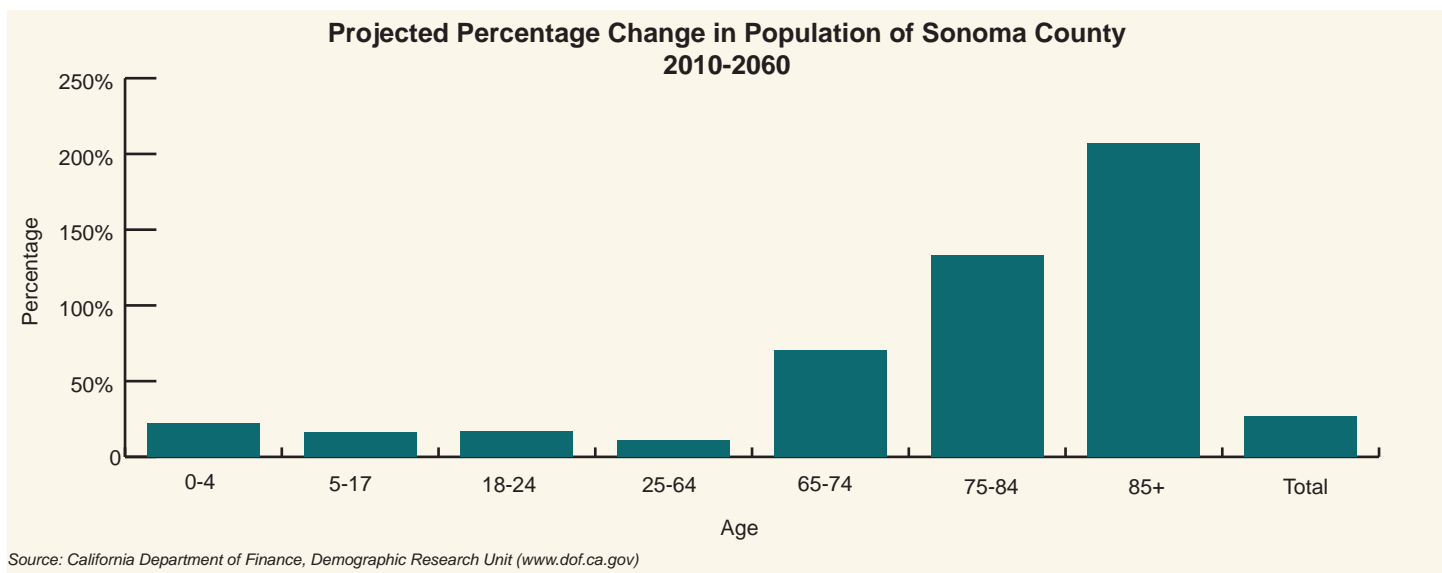
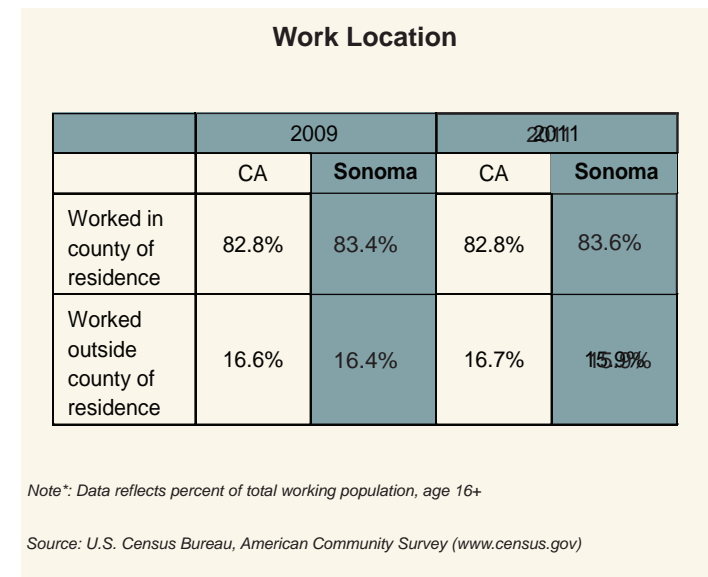
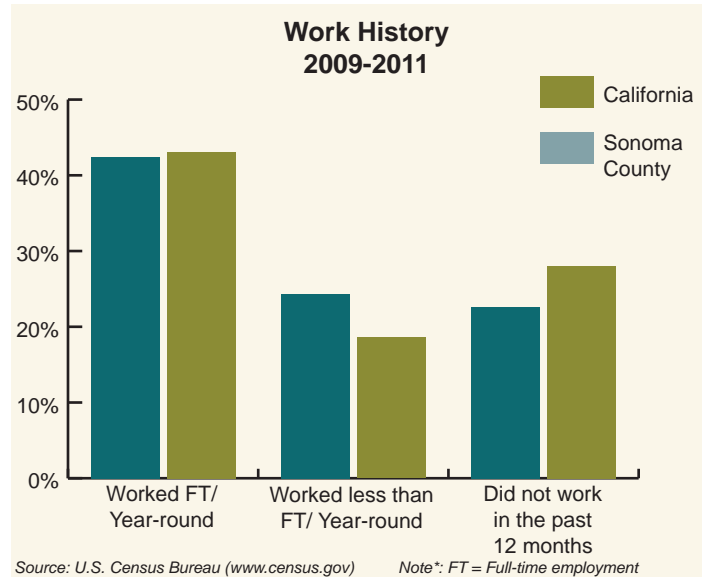
Sonoma County's unemployment rate fell in the past year, remaining well below California's unemployment rate. The three-year estimates show that 24% of Sonoma County residents worked less than full-time and 22% did not work, compared to 18% and 28% in California, respectively. The percent of population that was employed full-time is similar in both the state and Sonoma County, at 43% and 42%.

**Many Sonoma County residents work locally.** In 2011, 83.6% worked within the county, slightly higher than the California average of 82.8%. This is consistent with the number of residents who lived and worked in Sonoma County in 2009.

Demographic projections from 2010-2060 show that there will be a dramatic increase in older populations over the age of 65 years old, indicating a growth in the retirees and an increasing number of jobs that will need to be filled. There will be approximately a 20% increase in youth which will be particularly evident within the Hispanic community which is projected to grow by nearly 50% by 2050.

**Why is it important?**

Trends in employment help identify a community's ability to employ its residents and retain those employees. Additionally, those community members who are able to retain employment are more invested in their community. These trends are significant to note as Sonoma County slowly moves out of the current recession.



# Workforce

## Occupational Trends

### What is it?

**Occupational trends track changes in job requirements in Sonoma County as well as growth within the local economy.** Level of educational requirement and training of the workforce 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 the diversity of opportunity in the county.

### How is Sonoma County doing?

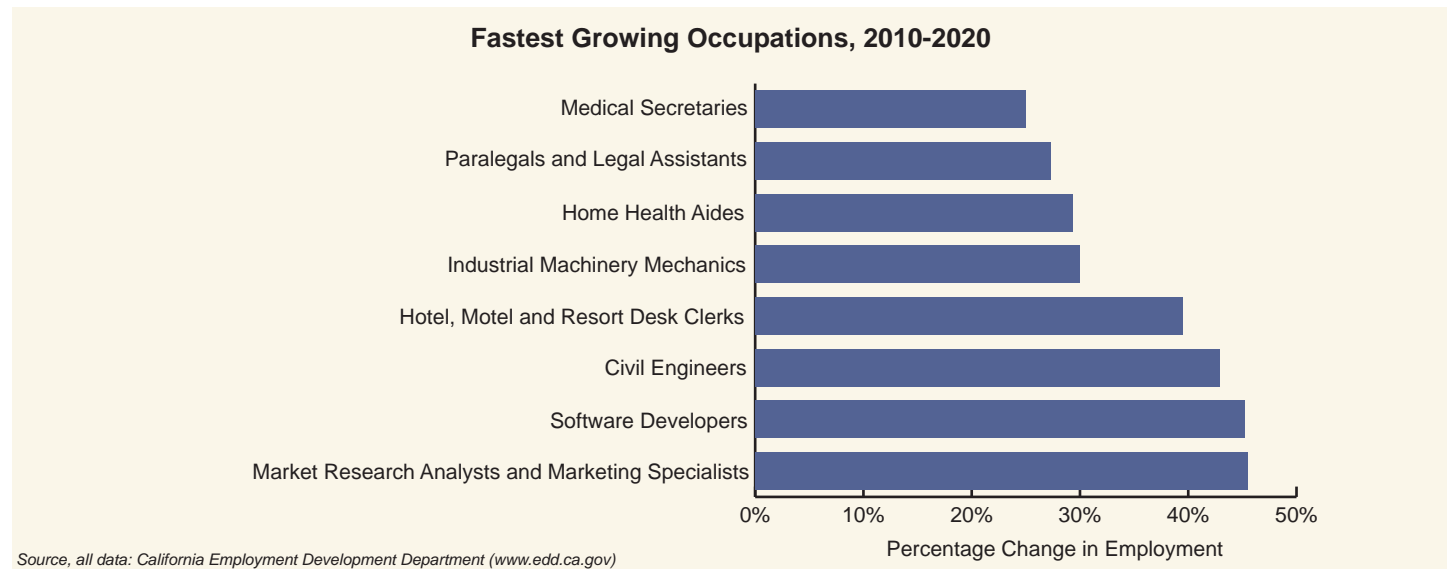
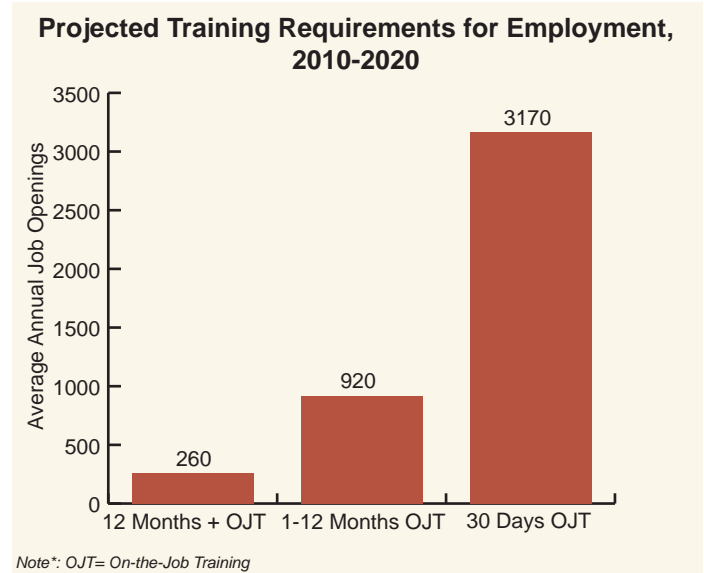
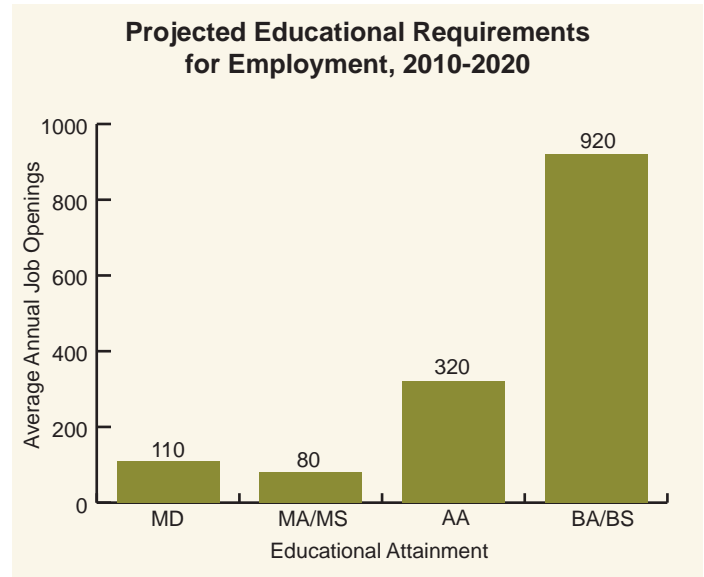
**Projected job openings for Sonoma County show a high need for post-secondary education and on-the-job training.** In particular, those with a Bachelor's degree will continue to be high in demand.

Among the fastest-growing occupations based on employment, a range of sectors is represented, from service-oriented occupations to professions in the health industry. Marketing specialists and software developers are among the fastest-growing occupations. Administrative positions tend to have high turnover rates, which could contribute to their numerous job openings. **The broad variety emphasizes the growing diverse businesses that are tapping into the talent pool available in Sonoma County.**

### Why is it important?

Education and training requirements tend to correlate to 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.**



Source, all data: California Employment Development Department ([www.edd.ca.gov](http://www.edd.ca.gov))

## 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 middle-range wages earned based on specified occupations.

### How is Sonoma County doing?

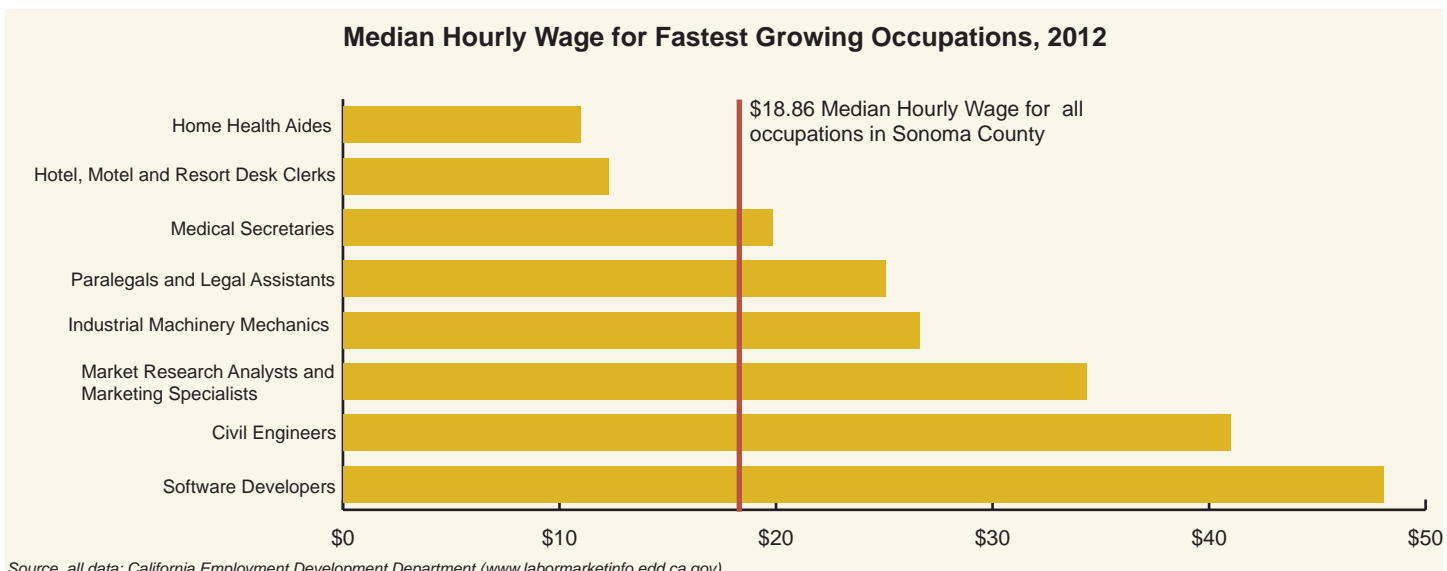
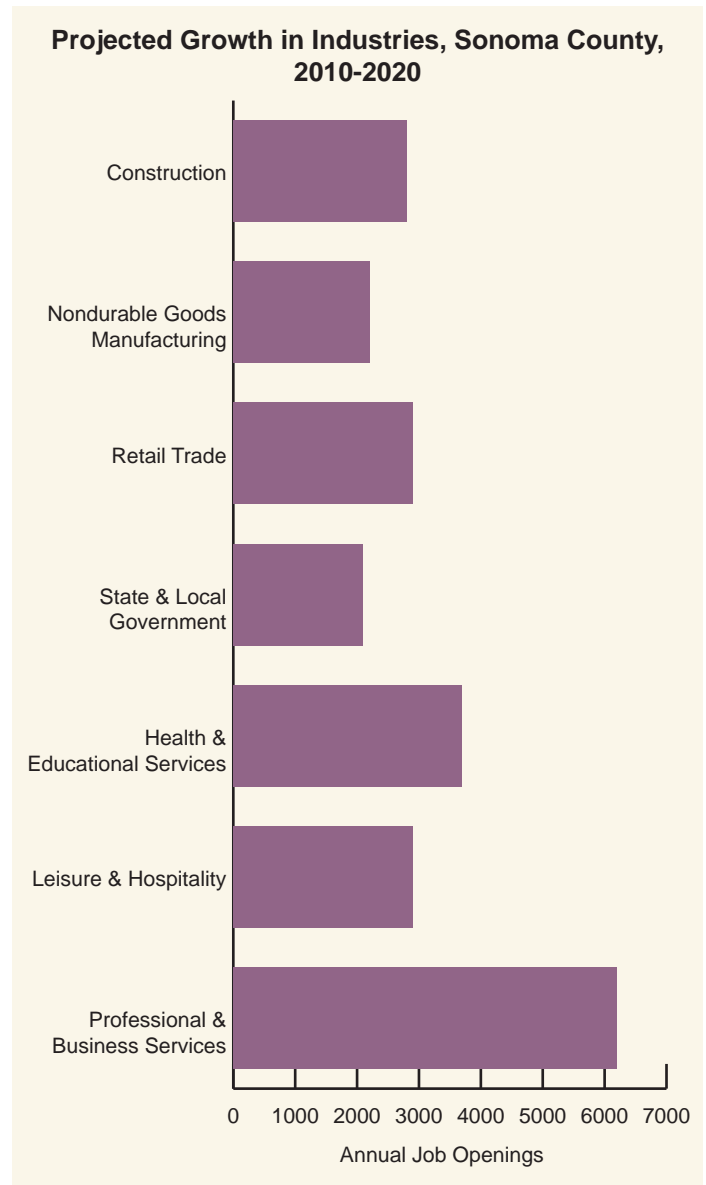
The Professional and Business Services sector is projected to have the largest growth in the county between 2010-2020, with an increase of 6,200 jobs annually. Health & Educational services and Leisure & Hospitality are expected to have annual growths of 3,900 and 2,900 jobs, representing an employment change of 15.4% and 14.4%, respectively.

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 on 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 to sustaining a healthy economy.



Source, all data: California Employment Development Department ([www.labormarketinfo.edd.ca.gov](http://www.labormarketinfo.edd.ca.gov))

# Workforce

## Earning Trends

### What is it?

**Earning trends look at educational background in relation to earned income.** Additionally, this page also highlights the number of households classified as low-income within Sonoma County and other comparable counties.

### How is Sonoma County doing?

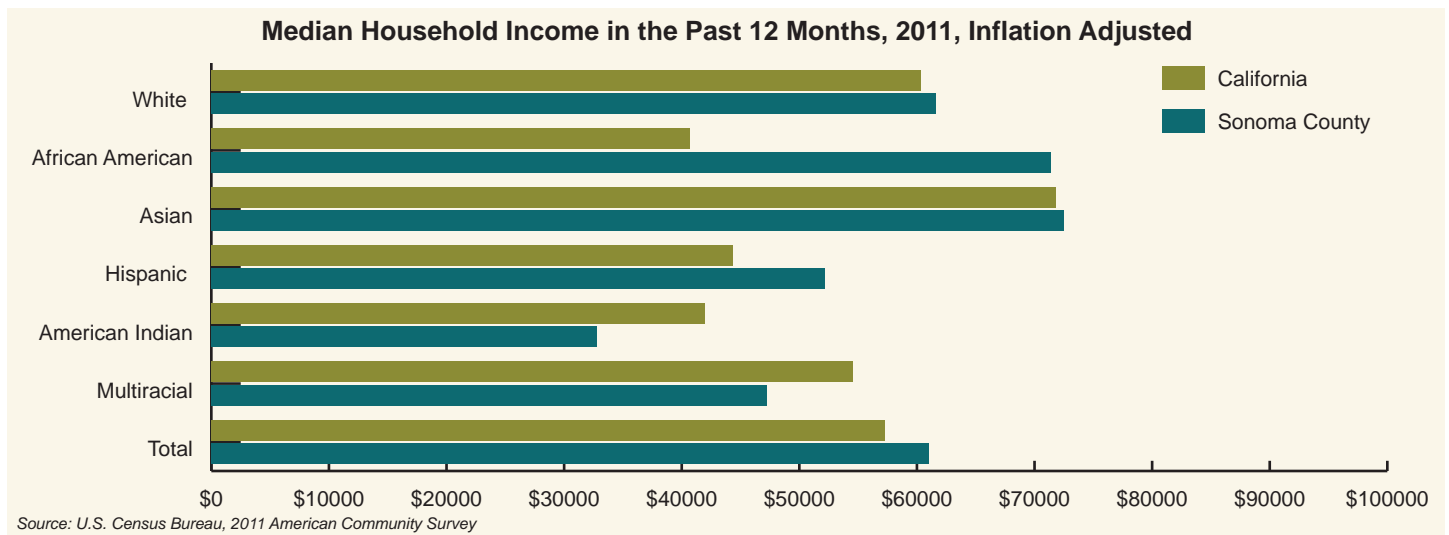
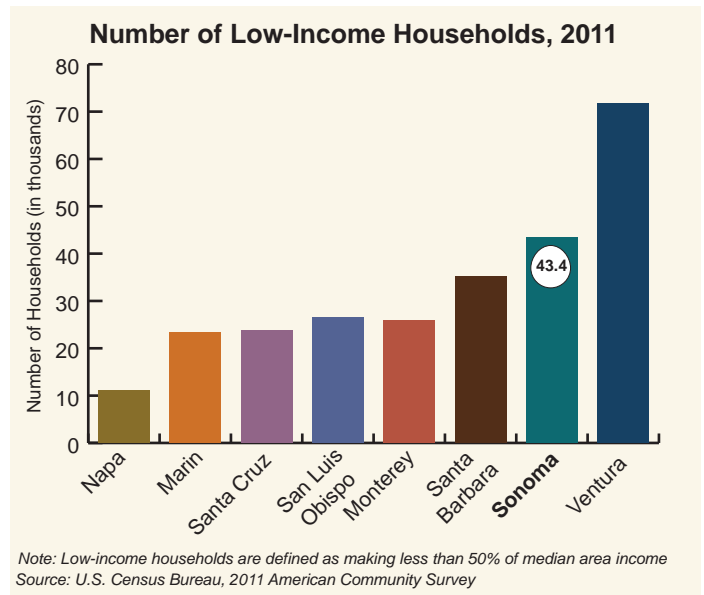
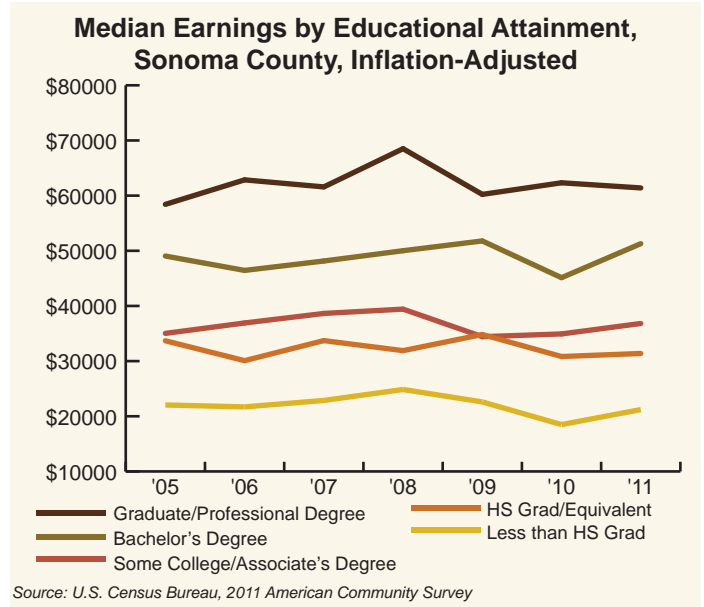
People with a stronger education background tend to earn a higher living in Sonoma County, a trend found nationally. The recession caused earnings to decrease among most levels of educational attainment, particularly with those with a Graduate/Professional degree. **All other educational levels saw an increase in earnings in 2011, a sign that the economy is stabilizing.**

Racial income inequality can be measured by examining median household income by race/ethnicity. In previous years, people of all ethnic backgrounds earned a higher income in Sonoma County compared to California, indicating that Sonoma County has a smaller racial disparity in earnings. With the exception of African Americans, it seems that statewide household incomes have increased in 2011 to match or even surpass Sonoma County levels.

Sonoma County had the second-highest number of low-income households compared to other comparable counties in 2011, at 43,390.

### Why is it important?

**Earning trends help to identify the characteristics that make for a qualified workforce, one that will enhance our local economy.** Identifying the needs of the local workforce and the qualities that create a more sustainable workforce ultimately enhance our quality of life, and our ability to retain and grow business locally.





## Note on Data Sources

The *2013 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 *2013 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 *2013 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 *2013 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](http://www.sonomaedb.org) for the unabridged version of *Indicators* released in Spring 2013. Readers are also invited to suggest indicators for future reports by calling (707) 565-7170 or e-mailing [edb@sonoma-county.org](mailto:edb@sonoma-county.org).

## Index Methodology and Design

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

For the competitiveness indices, each indicator was divided by the average value for California and then multiplied by 100. The total index figure was calculated by averaging, with equal weight, each indicator in the index.

The metrics were selected after evaluating other indices, namely the 2010 Regional Economic Scorecard produced by the Charleston Regional Development Alliance. The competitive indices, combined with the other indicators, can provide a more comprehensive understanding of trends in Sonoma County.

## Indicators Team

The *2013 Sonoma County Indicators* was prepared by the Economic Development Board project coordinators.

**Matthew Liedtke** was the project lead, managed and edited the report's overall layout and content. He specifically gathered data and prepared both the Economy section and the Indicator's "Competitiveness Indexes". He was responsible for editing the health section, with special assistance provided by Katrina Suprise of Sonoma County Health Services.

**Audrey Bendowski** was responsible for the research and preparation of the Tourism and Society sections, with acknowledgment to Sonoma County Tourism and the California Travel and Tourism Commission reports published by Smith Travel Research.

**Alexis Blair** gathered data and published both the Workforce and Environment sections, with thanks to the State of California Economic Development Department, Sonoma County Agricultural Preservation and Open Space District, and Sonoma County Water Agency.

# Methodology, Sources, and Notes

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## Sources

American Public Transportation Association	<a href="http://www.apta.com">www.apta.com</a>
Bay Area Real Estate Information Services, Inc.	<a href="http://www.bareis.com">www.bareis.com</a>
California Association of Realtors	<a href="http://www.car.org">www.car.org</a>
California Agricultural Statistics Service	<a href="http://www.nass.usda.gov">www.nass.usda.gov</a>
California Cancer Registry	<a href="http://www.ccrca.org">www.ccrca.org</a>
California Department of Education	<a href="http://www.cde.ca.gov">www.cde.ca.gov</a>
California Department of Finance	<a href="http://www.dof.ca.gov">www.dof.ca.gov</a>
California Department of Health Services	<a href="http://www.dhs.ca.gov">www.dhs.ca.gov</a>
California Department of Justice	<a href="http://www.oag.ca.gov/">www.oag.ca.gov/</a>
California Department of Public Health	<a href="http://www.cdph.ca.gov">www.cdph.ca.gov</a>
California Department of Resources Recycling and Recovery (CalRecycle)	<a href="http://www.calrecycle.ca.gov/">www.calrecycle.ca.gov/</a>
California Department of Transportation	<a href="http://www.dot.ca.gov">www.dot.ca.gov</a>
California Division of Travel and Tourism	<a href="http://www.visitcalifornia.com">www.visitcalifornia.com</a>
California Employment Development Department	<a href="http://www.edd.ca.gov">www.edd.ca.gov</a>
California Energy Commission	<a href="http://www.energy.ca.gov">www.energy.ca.gov</a>
California Healthy Kids Survey	<a href="http://www.californiahealthykids.org">www.californiahealthykids.org</a>
California Integrated Waste Management Board	<a href="http://www.ciwmb.ca.gov">www.ciwmb.ca.gov</a>
California Postsecondary Education Commission	<a href="http://www.cpec.ca.gov">www.cpec.ca.gov</a>
California State Parks	<a href="http://www.parks.ca.gov">www.parks.ca.gov</a>
California Travel & Tourism Commission	<a href="http://www.visitcalifornia.com">www.visitcalifornia.com</a>
County of Sonoma Department of Transportation and Public Works	<a href="http://www.co.sonoma.ca.us/tpw">www.co.sonoma.ca.us/tpw</a>
Dean Runyan & Associates	<a href="http://www.deanrunyan.com">www.deanrunyan.com</a>
Federal Reserve Bank of Cleveland	<a href="http://www.clevelandfed.org">www.clevelandfed.org</a>
Federal Transit Administration	<a href="http://www.ntdprogram.gov">www.ntdprogram.gov</a>
Economic and Social Research Institute	<a href="http://www.esri.gov">www.esri.gov</a>
Environmental Protection Agency	<a href="http://www.epa.gov">www.epa.gov</a>
Medical Board of California	<a href="http://www.medbd.ca.gov">www.medbd.ca.gov</a>
Metropolitan Transportation Commission	<a href="http://www.mtc.ca.gov">www.mtc.ca.gov</a>
National Association of Realtors	<a href="http://www.realtor.org">www.realtor.org</a>
North Bay Business Journal	<a href="http://www.northbaybusinessjournal.com">www.northbaybusinessjournal.com</a>
Pacific Gas & Electric	<a href="http://www.pge.com">www.pge.com</a>
Santa Rosa Junior College	<a href="http://www.santarosa.edu/research">www.santarosa.edu/research</a>
Smith Travel Research	<a href="http://www.smithtravelresearch.com">www.smithtravelresearch.com</a>
Sonoma County Agricultural Preservation and Open Space District	<a href="http://www.sonomaopenspace.org">www.sonomaopenspace.org</a>
Sonoma County Airport	<a href="http://www.sonomacountyairport.org">www.sonomacountyairport.org</a>
Sonoma County Climate Protection Campaign	<a href="http://www.climateprotectioncampaign.org">www.climateprotectioncampaign.org</a>
Sonoma County Economic Development Board	<a href="http://www.sonomaedb.org">www.sonomaedb.org</a>
Sonoma County Office of Education	<a href="http://www.scoe.org">www.scoe.org</a>
Sonoma County Planning and Resource Management Department	<a href="http://www.sonoma-county.org/prmd">www.sonoma-county.org/prmd</a>
Sonoma County Registrar of Voters	<a href="http://www.sonoma-county.org/regvoter">www.sonoma-county.org/regvoter</a>
Sonoma County Sheriff's Office	<a href="http://www.sonomasheriff.org">www.sonomasheriff.org</a>
Sonoma County Transit	<a href="http://www.sctransit.com">www.sctransit.com</a>
Sonoma County Transportation Authority	<a href="http://www.sctainfo.org">www.sctainfo.org</a>
Sonoma County Waste Management	<a href="http://www.recyclenow.org">www.recyclenow.org</a>
Sonoma County Water Agency	<a href="http://www.sonomacountywater.org">www.sonomacountywater.org</a>
The Press Democrat	<a href="http://www.pressdemocrat.com">www.pressdemocrat.com</a>
UCLA California Health Interview Survey	<a href="http://www.chis.ucla.edu">www.chis.ucla.edu</a>
United States Bureau of Economic Analysis	<a href="http://www.bea.gov">www.bea.gov</a>
United States Bureau of Labor Statistics	<a href="http://www.bls.gov">www.bls.gov</a>
United States Bureau of the Census	<a href="http://www.census.gov">www.census.gov</a>
United States Department of Housing and Urban Development	<a href="http://www.hud.gov">www.hud.gov</a>

The EDB encourages interested readers to recommend pertinent local indicators or ways in which we can improve this report. For additional information, questions or comments, please contact us at (707)565-7170. Or visit [www.sonomaedb.org](http://www.sonomaedb.org)

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