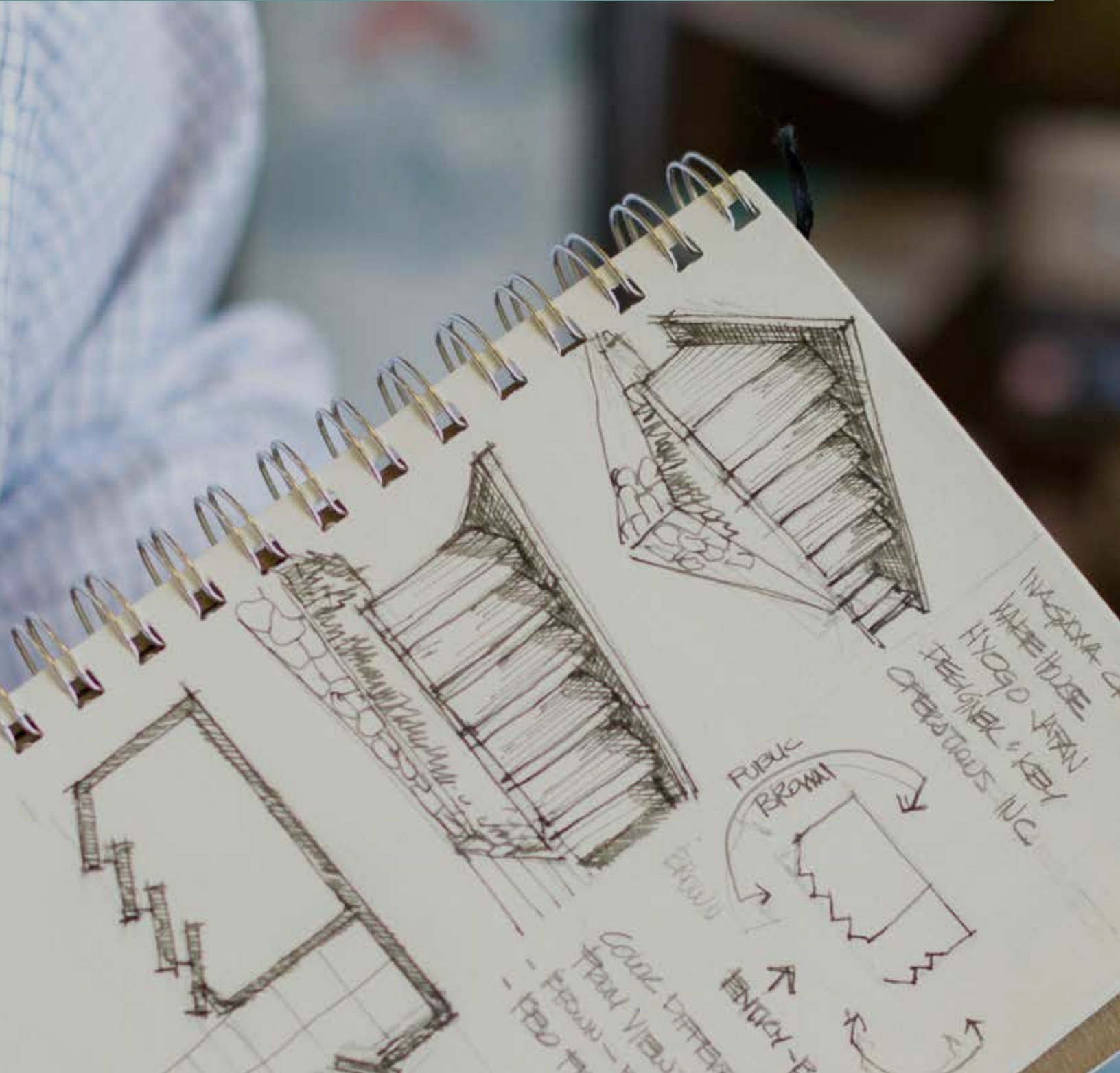




ABRIDGED SONOMA COUNTY INDICATORS

ECONOMIC REPORT

2017



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BY THE NUMBERS

ECONOMY	JOB GROWTH	MEDIAN INCOME	WEEKLY WAGE	MEDIAN HOME SALES PRICE
	2.2%	\$63,910	\$923	\$585,000
	Source: CALEDD	Source: ESRI	Source: ESRI	Source: ESRI
SOCIETY	POPULATION	MEDIAN AGE	BACHELOR'S DEGREE OR HIGHER	NET MIGRATION
	503,284	40.7	34%	1,121
	Source: ESRI	Source: ESRI	Source: ESRI	Source: Moody's
WORK-FORCE	UNEMPLOYMENT RATE	WORKING 35+ HOURS/WEEK	LABOR FORCE PARTICIPATION	EARNINGS W/ BACHELOR'S
	3.9%	55%	64.8%	\$50,404
	Source: CALEDD	Source: US Census	Source: US Census	Source: US Census
HEALTH	PEOPLE W/ HEALTH INS.	LEADING CAUSE OF DEATH	TYPES OF HEALTH INS.	25-34 YEAR OLDS INSURED
	93.2%	Cancer: 24.2%	Public: 37.5% Private: 69.3%	85.9%
	Source: US Census	Source: CDPH	Source: US Census	Source: US Census
ENVIRONMENT	DAYS W/ 'GOOD' AIR QUALITY	WASTE DISPOSAL PER CAPITA	TOTAL WATER USE PER CAPITA	GHG EMISSIONS (K TONS)
	97%	4.3 lbs per day	110 gal. per day	3,588,262
	Source: EPA	Source: CalRecycle	Source: SCWA	Source: CCP
TOURISM	EMPLOYMENT GENERATED	DIRECT SPENDING	T.O.T. REVENUE	
	19,710 jobs	\$1.82 bil.	\$9.24 mil.	
	Source: Dean Runyan	Source: Dean Runyan	Source: Dean Runyan	

EXECUTIVE SUMMARY

January 2017

The Sonoma County Economic Development Board (EDB) is pleased to present the 2017 *Abridged Sonoma County Indicators*. The indicators chosen for this year's report focus on the connections between the economy and the community, measuring our progress and benchmarking our performance to similar counties in California.

This annual assessment of our region's progress is meant to help guide discussions by local business, government, community, and education leaders regarding strategies for shaping our region's economic future. The EDB is committed to working with our partners to take the actions necessary to build our strengths and to address our deficiencies in order to improve the economic opportunities and quality of life for all Sonoma County residents. This report features a competitiveness section intended to measure regional competitiveness not only with economic elements but also through the region's quality of life and cost of doing business.

In an effort to provide the most current and comprehensive annual data in this year's report, the scope of this preliminary report has been narrowed. The full unabridged report will be made available on-line at www.sonomaedb.org in the Spring of 2017.

HIGHLIGHTS



All signs point towards a vibrant economic recovery. The **unemployment rate fluctuated around 4%** the last year and the county continues to add jobs and business establishments. Furthermore, the county maintains a high quality of place index and a low cost of doing business, which aids efforts to attract more businesses and workers.



The demography of Sonoma County continues to evolve with the county facing an **increasingly aging population**. The White population of the County remains the most populous ethnicity, yet the Latino population is continually growing as the largest minority group.



Strong employment gains in multiple industry clusters and a continuing trend of low unemployment rate are a positive indication of a sustainable economic recovery taking hold in Sonoma County.



The impact from the roll out of The Patient Protection and Affordable Care Act (ACA) dominates the changes in statistics related to health. **Health insurance rates increased** markedly and a significant increase in the percent with public health insurance occurred. Both trends are due to the implementation of the ACA.



Sonoma ranks highest in air quality compared to other North Bay counties, shows a declining trend in waste disposal per capita and total water use, and has reached a 15-year low in the emission of greenhouse gases.



Employment generated by destination spending and total direct spending both continue to grow, which highlight Sonoma County's **growing popularity as a tourist destination**. Further, Transient Occupancy Taxes are the highest they have ever been since the EDB started tracking these numbers, which indicates a thriving tourism industry.

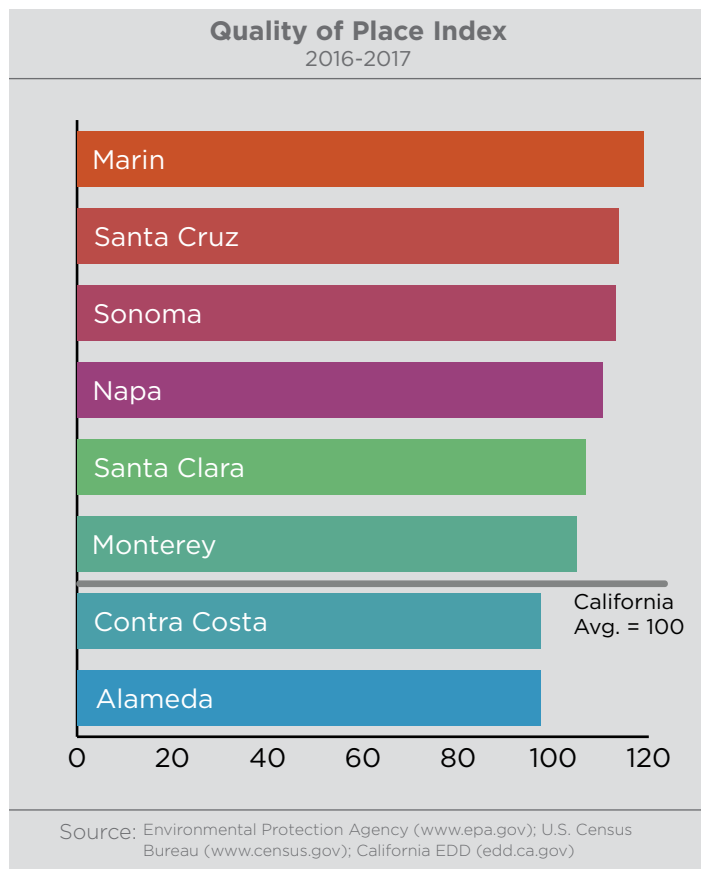


QUALITY OF PLACE INDEX

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 stems from the fact that highly educated workers have more flexibility in where they choose to live, as their special knowledge and skills are in high demand. Furthermore, a high quality of place can act to attract businesses to the area. As such, an area's lifestyle attributes are crucial to its long-term economic success.

OVERVIEW

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



QUALITY OF PLACE INDEX

QUALITY OF PLACE INDICATORS

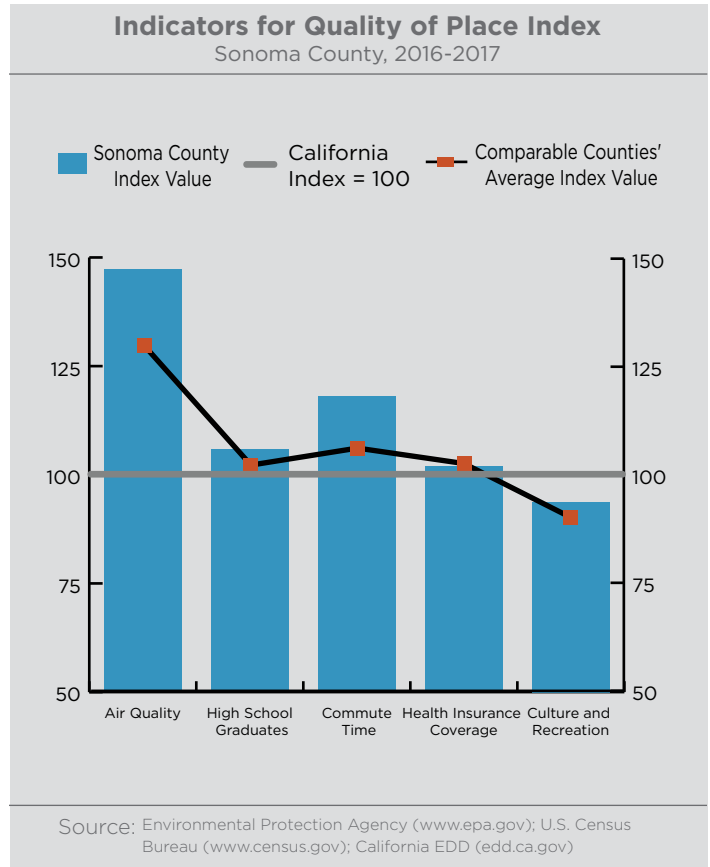
Air Quality: This is the percentage of days with air quality measured as ‘good’ by the Environmental Protection Agency. Sonoma County ranked equal to Santa Cruz County, with 97% of days measured rated as ‘good’ in 2016 for both counties.

High School Graduates: This indicator represents the percentage of adult population (25+) with a high school diploma or higher. The better educated the regional workforce, the more quickly an economy can take advantage of new opportunities and recover from negative shocks. Sonoma County ranked fifth among comparable counties, with 87% of residents holding at least a high school diploma.

Commute Time: The commute time measures the average time spent traveling to work by county residents. Sonoma County exhibited the second-lowest commute time among comparable counties, at an average of 24.5 minutes. This places Sonoma County behind only Monterey County.

Health Insurance Coverage: The number of individuals with health insurance coverage has seen an increase in recent years. Sonoma County ranked seventh among comparable counties with 93.2% of residents having health insurance coverage. Sonoma County only had a higher percentage of citizens insured than Monterey County.

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



COST OF DOING BUSINESS

BUSINESS ATTRACTION

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

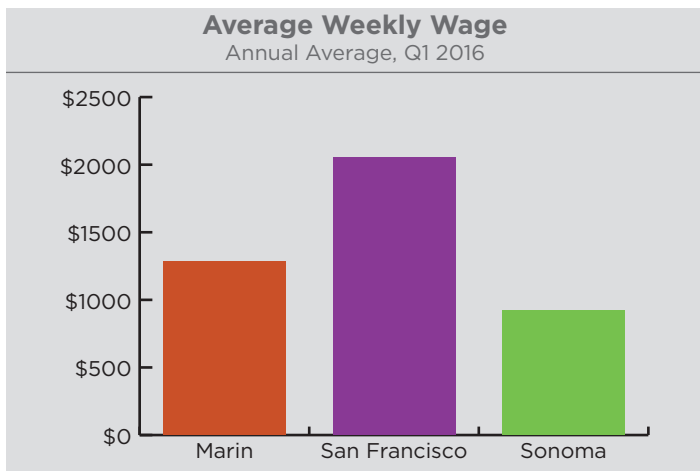
Sonoma County has **lower commercial property lease rates, lower average weekly wages, and lower sales and property tax rates**, therefore lowering the cost of doing business when compared to Marin and San Francisco Counties. This low cost of doing business combined with a high “quality of place” index score puts Sonoma County in a strong position to attract new and existing business ventures.

COST OF DOING BUSINESS COMPARISON

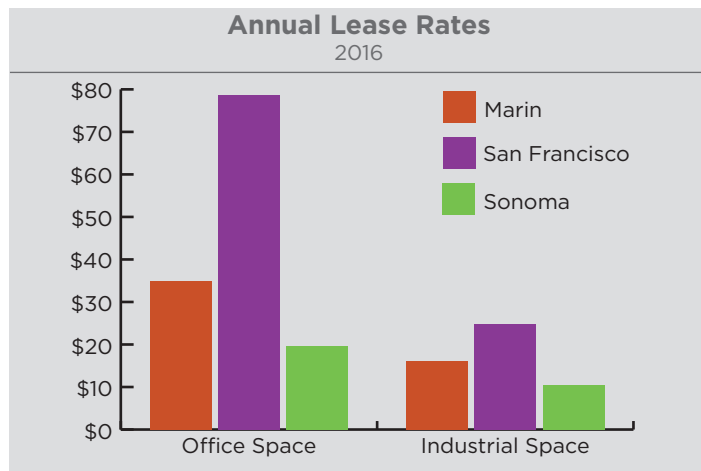
		Sonoma County	Marin County	San Francisco County
Lease Rates avg. per sq. ft.	Office	\$19.62	\$34.96	\$78.59
	Industrial	\$10.50	\$16.08	\$24.91
Average Weekly Wages		\$923.00	\$1,282.00	\$2,054.00
Tax Rates	Sales Tax	8.00%	8.25%	8.50%
	Property Tax	1.0405%	1.0548%	1.1240%

Sources: Lease Rates
Average Weekly Wages
Tax Rates

Marin: Cushman & Wakefield (cushmanwakefield.com), All others: Loopnet (loopnet.com)
Q1 2016, U.S. Bureau of Labor Statistics (www.bls.gov)
Sales Tax: California Board of Equalization (www.boe.ca.gov), Property Tax: Effective Rate with Low Bond
Indebtedness (www.BeSmartee.com)



Source: U.S. Bureau of Labor Statistics (www.bls.com)



Source: Marin Office Space Rates: Cushman & Wakefield
All Other Rates: Loopnet



ECONOMY

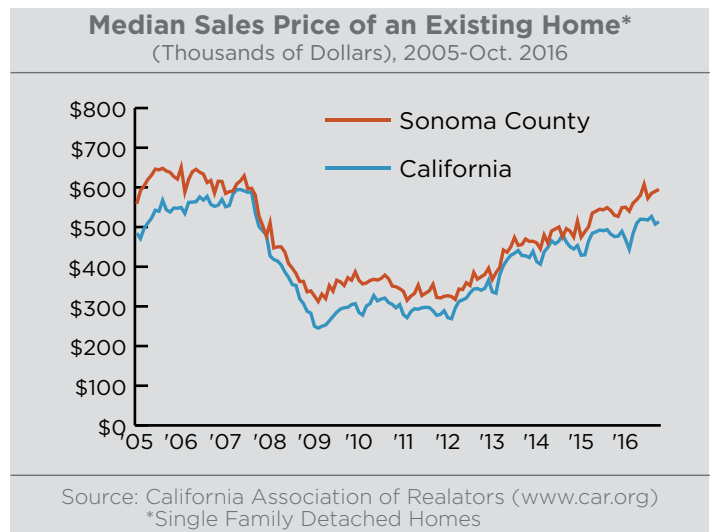
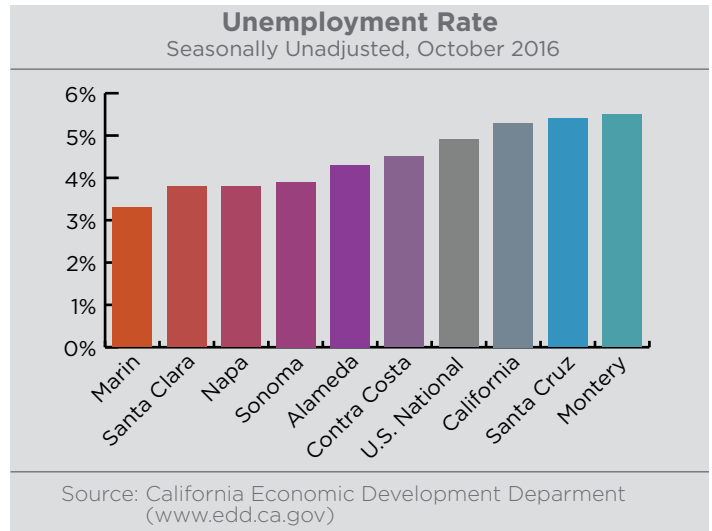
Economic Indicators include employment levels, median home prices, income, and job growth measures. In addition to representing the type and level of economic activity in the county, economic indicators illustrate strengths, challenges, and changes within Sonoma County relative to comparable counties.

UNEMPLOYMENT RATE

The unemployment rate represents the percentage of individuals actively seeking work, but who remain unemployed relative to the labor force. Sonoma County experienced a seasonally unadjusted unemployment rate of 3.9% in October 2016. This puts Sonoma County fourth in terms of the unemployment rate, behind Santa Clara, Napa, and Marin counties. Additionally, Sonoma County maintains an unemployment rate lower than the state average (5.3%) and the U.S. National Average (4.7%) during the same period.

MEDIAN HOME PRICES

In October 2016, the median sales price of an existing single family home in Sonoma County rose to \$590,000, a \$48,500 increase from a year ago. Further, this sales price exceeds the median state price of \$514,320 for the same month. However, the median sales price falls 30% below the median sales price in the San Francisco Bay Area (\$770,150), a difference of \$180,150. Sales prices continue to increase since the aftermath of the recession, starting in earnest in 2012, but have yet to reach the pre-recession peak.



ECONOMY

MEDIAN HOUSEHOLD INCOME

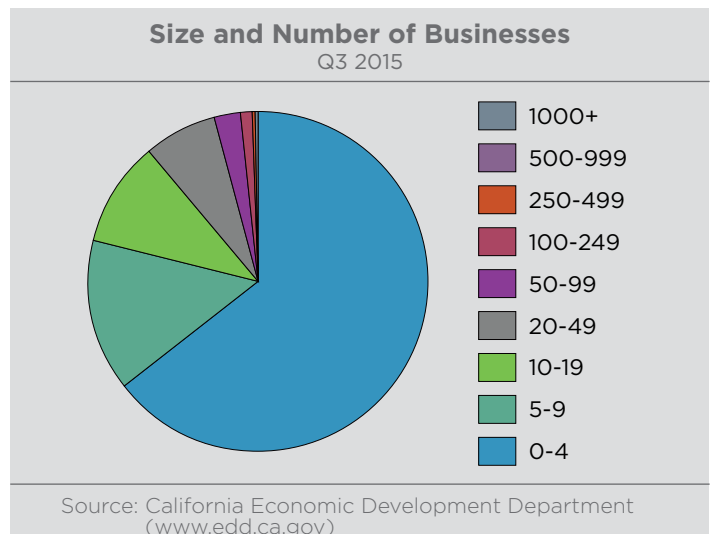
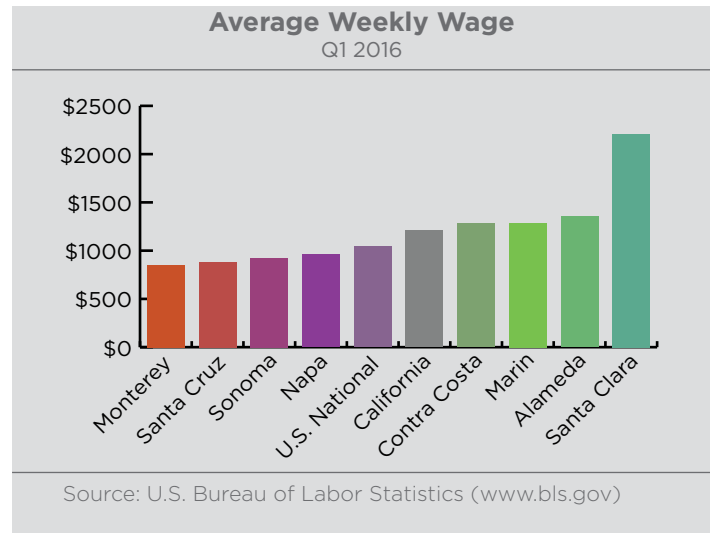
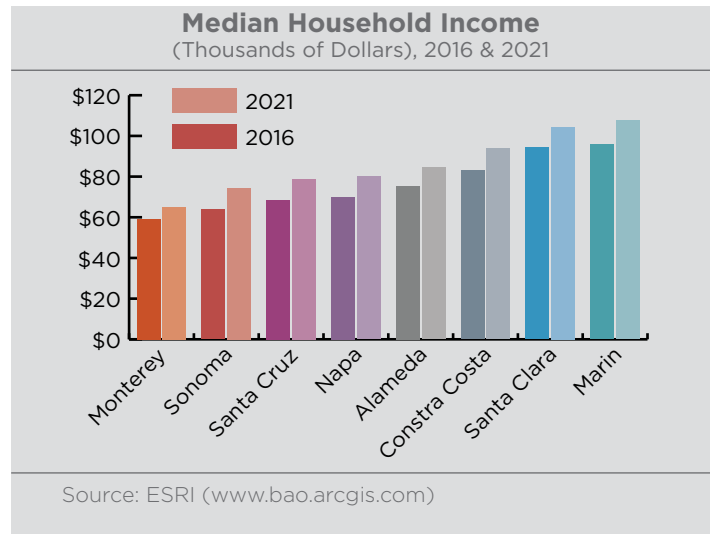
Median household income represents the level of earnings with half of households below and half above. From 2016 to 2021, projections show Sonoma County's median wage increasing from \$63,910 to \$74,485. Despite this increase, Sonoma County's median income still remains below all comparable counties, except for Monterey County.

AVERAGE WEEKLY WAGE

Employees in Sonoma County brought home an average weekly wage of \$923 in Q1 2016. This represents an increase of only \$1 compared to the Q1 2015. However, in Q4 2015, average weekly wages peaked at \$1,048, the highest since data was made available in 2006. Even with less than a one percent change in average weekly wage, Sonoma County ranked 165 out of the 345 largest counties in wage growth. Sonoma County's average weekly wage ranks lower than the U.S. National average (\$1,043) and the California average (\$1,206).

SIZE AND NUMBER OF BUSINESS ESTABLISHMENTS

In Q3 2016, 19,137 pay-rolled business establishments operated in Sonoma County serving 503,284 residents. This represents a net increase of 334 businesses from Q3 2014. Small businesses provide an important service to the local economy by creating jobs and spurring economic vitality. Approximately 89% of the businesses in Sonoma County employed fewer than 20 people. The County added 303 small businesses in the past year.



ECONOMY

INDUSTRY EMPLOYMENT

Employment increased in all industries except for Farm, in which a slight decrease occurred from the 2015 annual average compared to the 2016 average. In the last 5 years, Construction (34%), Education & Health Services (31%), and Leisure and Hospitality (25%) experienced the strongest growth.

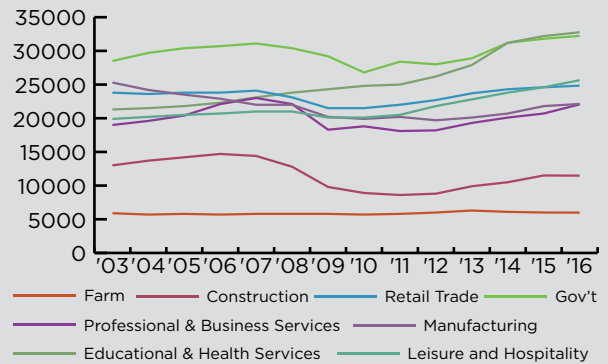
JOB GROWTH

Sonoma County ranked second to last among comparable counties in job growth from October 2015 to October 2016. Employment grew at a rate of 2.79% over the last 12 months, out pacing only Monterey County.

TOP PRIVATE EMPLOYERS

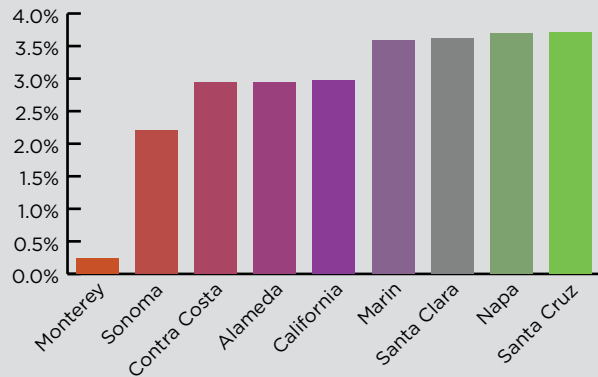
According to the North Bay Business Journal, Kaiser Permanente remained the top private employer in Sonoma County in 2015-2016, adding an additional 85 jobs during this time. Graton Resort and Casino remained the second-largest employer from the previous year with 2,000 employees. St. Joseph Health System (1,578) replaced Sutter Santa Rosa Regional Hospital (936) as the third largest employer after Sutter Santa Rosa Regional Hospital experienced a decrease of 861 jobs from 2014-2015 to 2015-2016.

Employment in Selected Industries
2003-2016



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

Percent Job Growth
October 2015-October 2016



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

Sonoma County Top Private Employers
2015-2016

	Company	# employees
1	Kaiser Permanente	2,640
2	Graton Resort and Casino	2,000
3	St. Joseph Health System	1,578
4	Keysight Technologies	1,300
5	Safeway Inc.	1,200
6	Sutter Santa Rosa Regional Hospital	936
7	Amy's Kitchen	870
8	Medtronic CardioVascular	840
9	Jackson Family Wines	800
10	Cyan	700

Source: North Bay Business Journal Book of Lists, 2016



SOCIETY

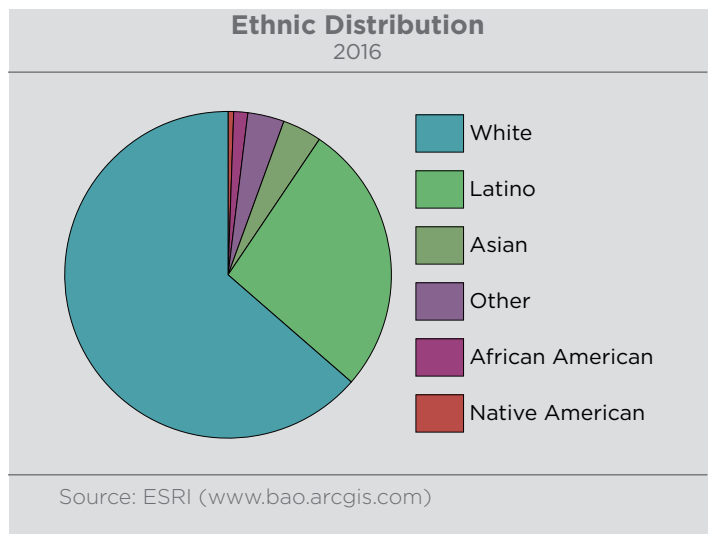
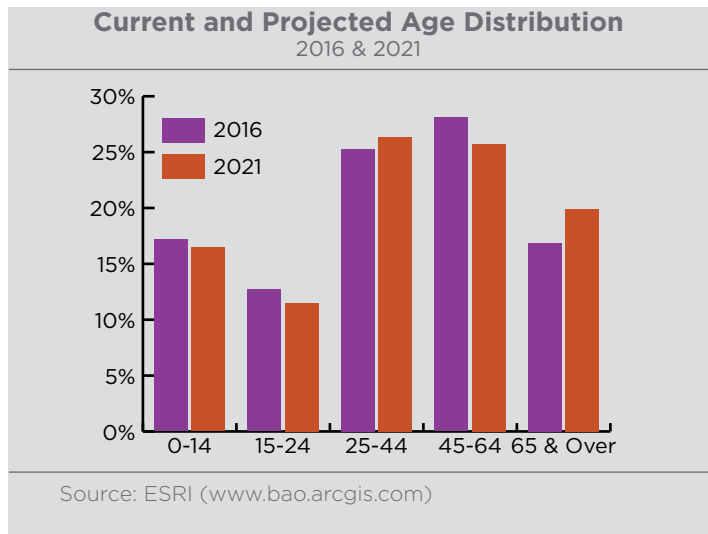
Society indicators include education levels and demographic trends. These indicators illustrate relative performance in quality of education as well as changes in demographics.

CURRENT AND PROJECTED AGE DISTRIBUTION

Current and projected age distribution displays the breakdown of Sonoma County’s population in 2016 and projected percentages in 2021 using five different age brackets. The 25-44 age bracket is projected to overtake the 45-64 bracket by 2021 and thus become the most populous age range in the county. Conversely, the percentage of the population under 25 is projected to decline from approximately 30% in 2016 to 28% in 2021. A noticeable increase occurs in the population of those in the 65 & over age bracket, signaling the advancement of an aging population.

ETHNIC DISTRIBUTION

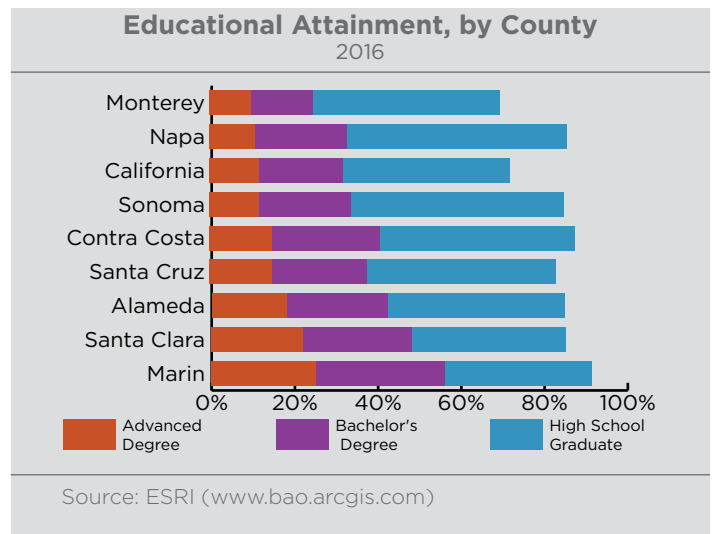
Ethnic distribution in Sonoma County reflects the ethnic make-up of the county population. The White population comprises the majority of the population (63.3%), however this ethnic group constitutes a smaller percentage of the population compared to previous years. The Latino population represents the largest minority group covering over a quarter of the population (26.9%), while other minorities each represent less than 5 percent of the population: Asian (4.1%), all other groups (3.8%), African American (1.5%), and Native American (0.7%).



SOCIETY

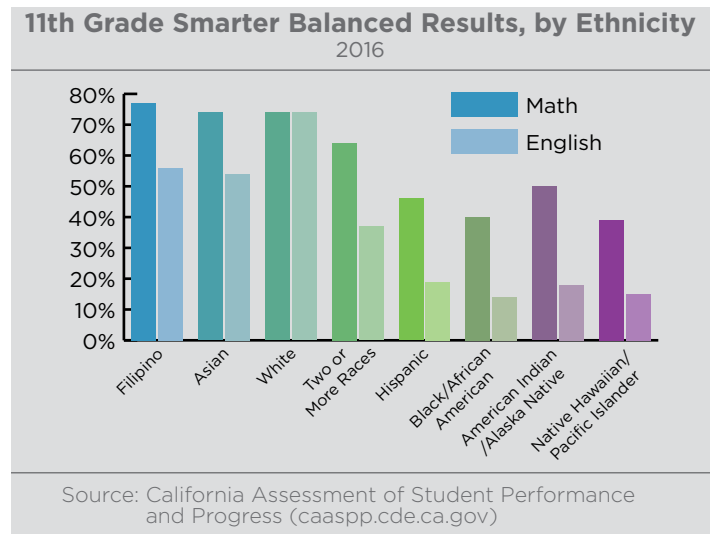
EDUCATIONAL ATTAINMENT, BY COUNTY

Educational attainment by county depicts the proportion of the population who achieved certain educational qualifications, both in Sonoma County and comparable counties. Sonoma County equals or outperforms the California averages in all 3 categories of educational attainment, but trails several counties, in particular with regards to the proportion of the population with advanced degrees (12%). In terms of those with at least a high school diploma, Sonoma County surpasses the California average (72.2%) yet lags behind other counties even though 85% of the population held a high school diploma or higher in 2016.



11TH GRADE SMARTER BALANCED RESULTS, BY ETHNICITY

The recently introduced California Smarter Balanced Assessments measure progress toward college and career readiness at the end of each grade. Since the first introduction of the Smarter Balanced Assessments in 2015, the 2016 mean test scores in both English Language and Math have increased as an average across all participating students. The 2016 11th Grade Smarter Balanced Results display clear disparities between attainments in English Language and Math across ethnicities to a greater extent than previous trends observed in the results of the California High School Exit Exam (CAHSEE).



WORKFORCE

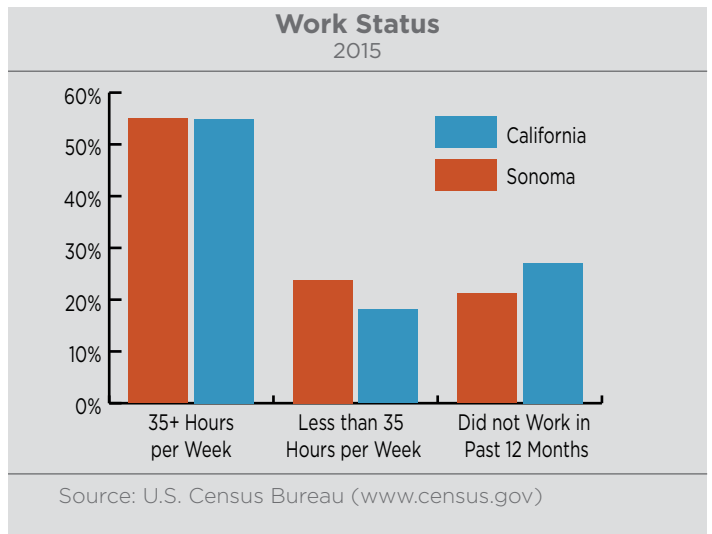
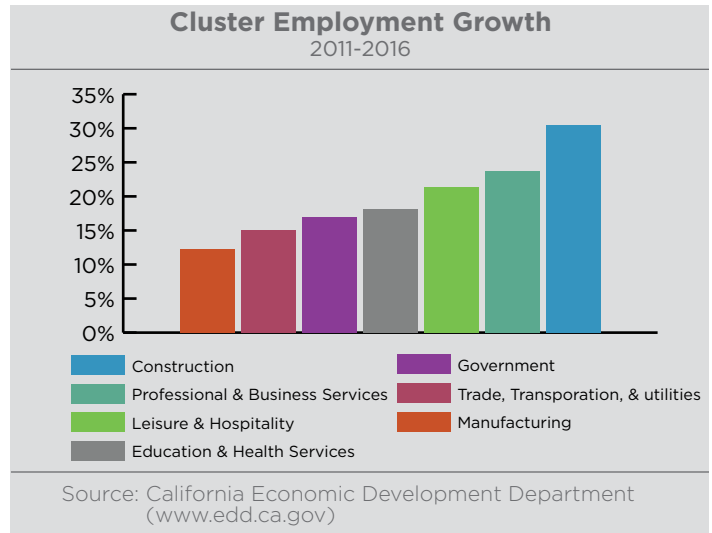
Workforce indicators provide information on demographic trends, employment concentration and growth in Sonoma County. These indicators illustrate opportunities and challenges for the county's workforce.

CLUSTER EMPLOYMENT GROWTH

Sonoma County continues to have strong employment gains in Education & Health Services, growing by 18% since 2011, driven by the Health Care & Social Assistance sector that contributed 5700 additional jobs since 2011, with 400 jobs in the last year alone. Other leading industries post-recession include Leisure & Hospitality which grew by 21%, indicative of a vibrant tourism sector, with Accommodation & Food Services growing by 24% and Food Services & Drinking Places growing by 26% since 2011. Additionally, within the past 5 years Government grew by 17%, mainly due to Special Districts plus Indian Tribes, which added 1600 jobs in this time frame. Construction rebounded after the recession with a 30% growth in the industry since 2011.

WORK STATUS

55% of Sonoma County's labor force worked 35 hours or more per week, an increase from 2014, and 24% of the local labor force worked less than 35 hours per week in 2015. The local population that did not work remained at 21%, compared to 27% in California.



WORKFORCE

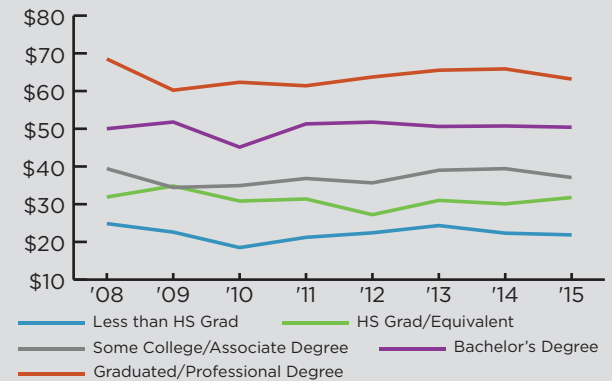
MEDIAN EARNINGS, BY EDUCATIONAL ATTAINMENT

Graduate/Professional, Bachelor's, Some College/Associate, and Less than HS Degrees saw minor decreases in median earnings in 2015, while HS Grad/Equivalent saw a modest increase. Median earnings for Graduate/Professional Degree holders fell around \$2,000 from 2014, coming in at \$63,174. However, higher education results in higher median earnings, with local college graduates making 59% more on average than a typical high school graduate.

LABOR FORCE PARTICIPATION RATE

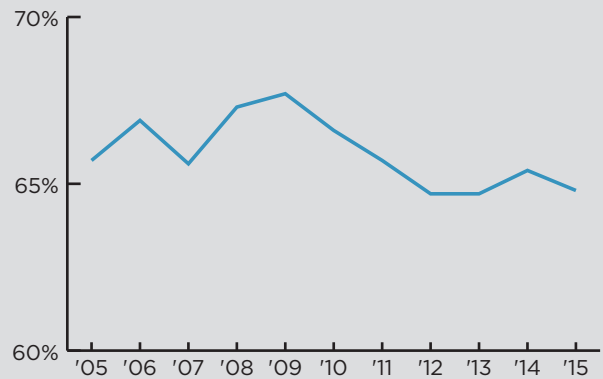
The 2015 labor force participation rate of 64.80% in Sonoma County continues to be below pre-recession levels, which reached a peak of 67.70% in 2009. While Sonoma County has a low unemployment rate, the unemployment rate does not take into account discouraged workers who are no longer actively seeking jobs. The decreasing labor force participation rate indicates that workers who left the labor force during the recession have not yet returned, despite a sustainable economic recovery.

Median Earnings, by Educational Attainment
(Thousands of Dollars), Inflation Adjusted, 2008-2015



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

Labor Force Participation Rate
2005-2015



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

HEALTH

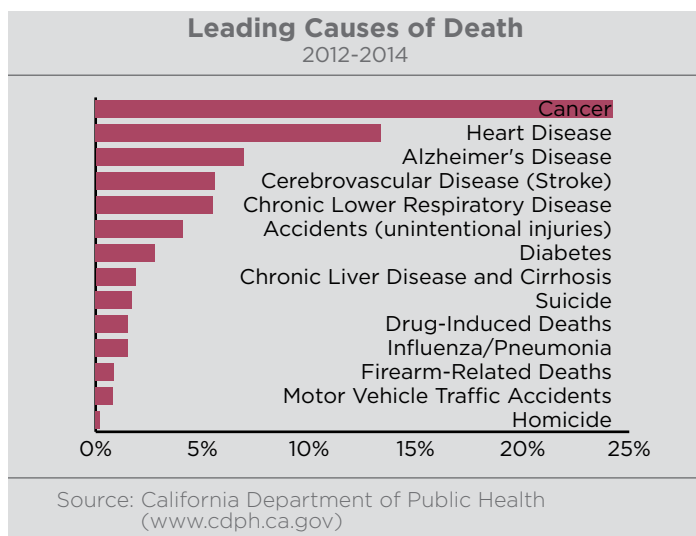
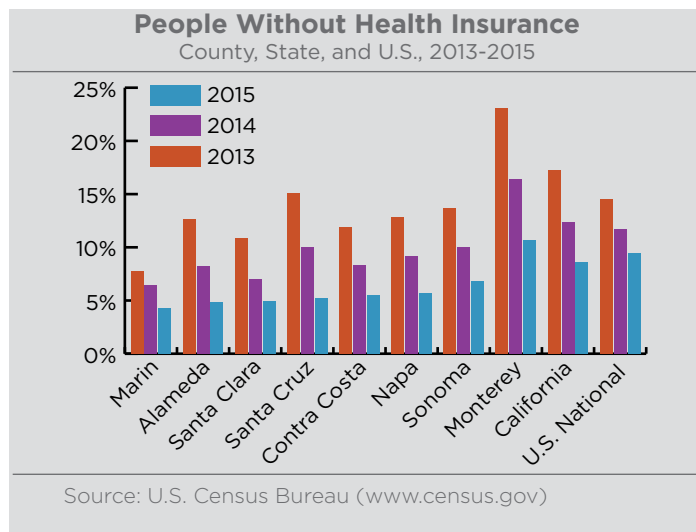
Health indicators provide a snapshot into the state of the health sector and of the well-being of the population. The past few years reveal the particularly interesting impact from the roll out of The Patient Protection and Affordable Care Act across the county, the state, and the nation.

PEOPLE WITHOUT HEALTH INSURANCE

Sonoma County continues to have a greater percentage of its population covered by health insurance than California and the US. The percentage of uninsured individuals in Sonoma County fell from 10.0% in 2014 to 6.8% in 2015, a substantial 32% decrease in the number of uninsured individuals. This fall is consistent with surrounding counties, the state, and the country.

LEADING CAUSES OF DEATH

Cancer constitutes the leading cause of death, accounting for almost a quarter, 24.2%, of all deaths in Sonoma County over 2012-2014. Coronary heart disease remains the second leading cause, accounting for 13.4%. California experiences the same two leading causes of death. Sonoma County exhibits a higher percentage of deaths caused by Alzheimer's disease, 6.9%, than California, 4.9%. Sonoma County's aging population represents a potential reason for this divergence, with 17.5% of county residents over 65 years of age compared to 13.3% for California.

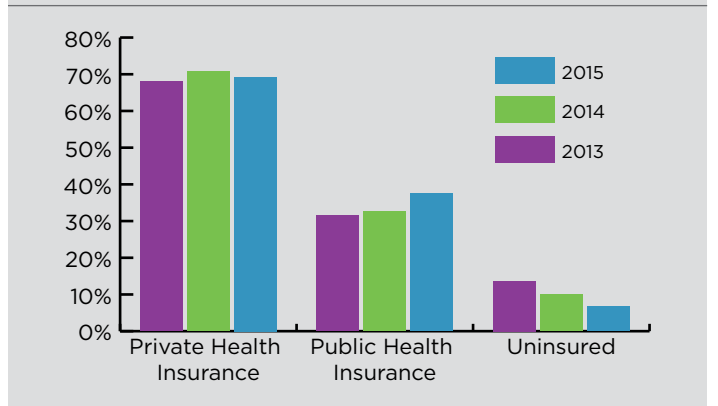


HEALTH

PEOPLE WITH HEALTH INSURANCE, BY TYPE OF COVERAGE

The data shows a primary driver behind the decrease in the uninsured population derives from an increase in public health insurance coverage. This significant increase in public health insurance coverage relates to the roll out and implementation of The Patient Protection and Affordable Care Act (ACA), which requires all citizens to obtain health insurance, prevents insurers from turning people away with pre-existing conditions, and expands public insurance options. This contributed to the percent of people who were uninsured. Of note, people can hold more than one type of health insurance, hence why categories sum to more than 100%.

People with Health Insurance, by Type of Coverage
Sonoma County Residents, 2013-2015

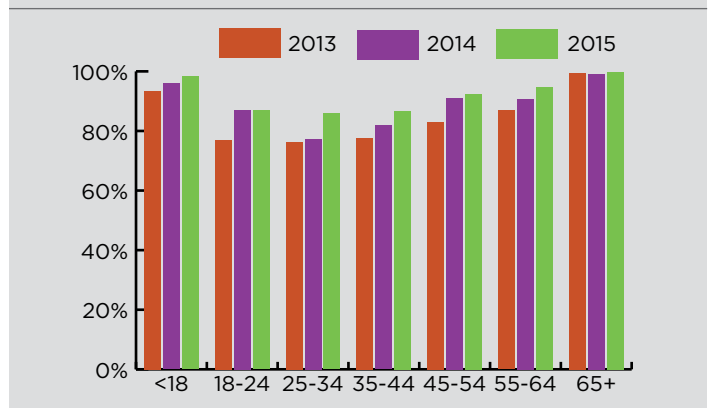


Source: U.S. Census Bureau (www.census.gov)

PEOPLE WITH HEALTH INSURANCE, BY AGE GROUP

While every age group experienced increases in coverage from 2013 to 2015, the greatest change occurred for the 18-24 and 25-34 year old age groups, with an increase of 9.9 and 9.7 percentage points respectively. This stems primarily from the ACA and Medi-Cal. The ACA encouraged more young people to get health insurance coverage. For instance, the ACA raised the age at which children could be removed from their parents' health insurance plan from 19 to 26 years old. This especially helps explain the increase in health insurance coverage for the 18-24 and 25-34 age groups.

People with Health Insurance, By Age Group
Sonoma County Residents, 2013-2015



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

ENVIRONMENT

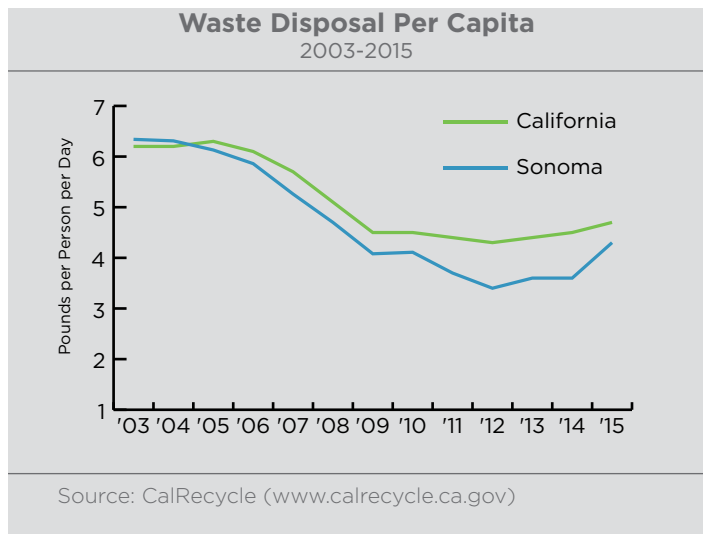
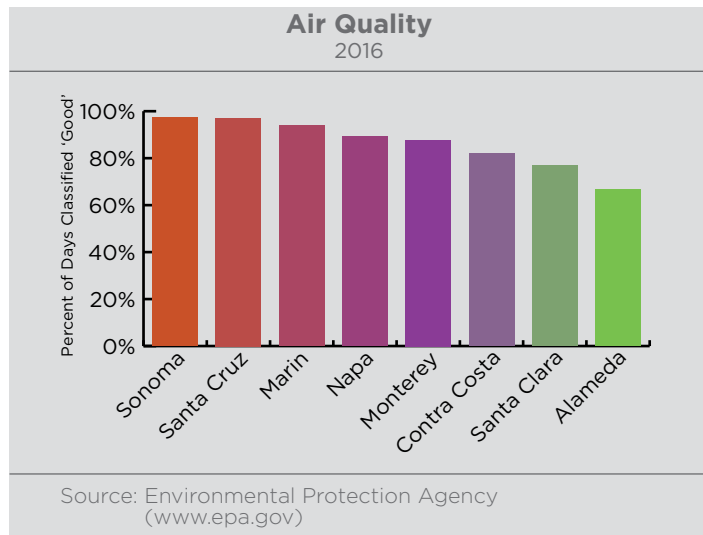
Environmental indicators measure environmental performance for Sonoma County, which relate to quality of life in the county.

AIR QUALITY

Air quality relates to the quality of life through the risk on human health brought on by pollution. This includes higher risks for respiratory infections, lung cancer, and asthma, among others. This indicator shows how clean or polluted the air is through a combined measure of ground-level ozone, particulate matter, carbon monoxide, sulfur dioxide, and nitrogen dioxide. The EPA classifies days as ‘good,’ ‘moderate,’ ‘unhealthy for sensitive groups,’ ‘unhealthy,’ or ‘very unhealthy.’ Sonoma County experienced 97% of the days covered classified as ‘good’ so far in 2016, with no days considered ‘unhealthy,’ even for sensitive groups. Sonoma County outperformed all the other comparable counties.

WASTE DISPOSAL

Since 2005, Sonoma County consistently exhibits lower waste per capita rates than the state average. While waste disposal per capita in Sonoma County decreased since 2003, the County experienced a considerable uptick in the last year (and a lesser increase in the previous year), from 3.6 pounds per person per day in 2014 to 4.3 in 2015. This increase puts waste disposal per capita at its highest rate since 2008 (4.7). Solid waste relates to economic activity. As labor markets, real estate markets, construction activity, and broader economic conditions continue to improve, solid waste generation will continue to grow. The strong increase from 2014 to 2015 corresponds to a stronger economic recovery over that time frame.



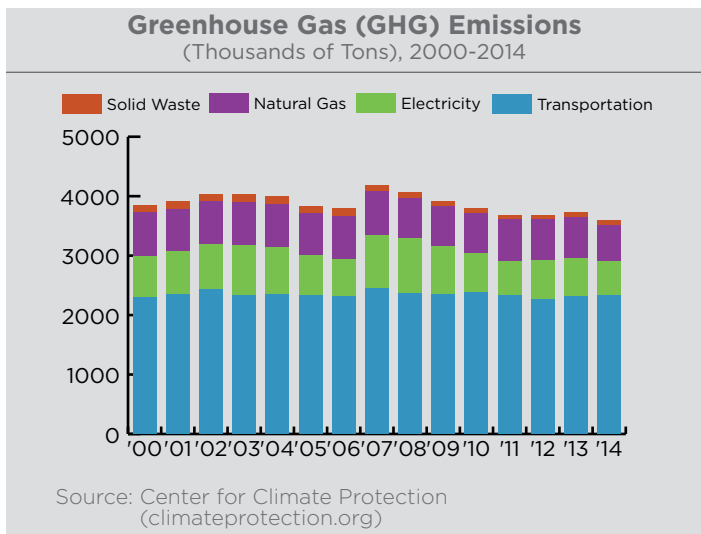
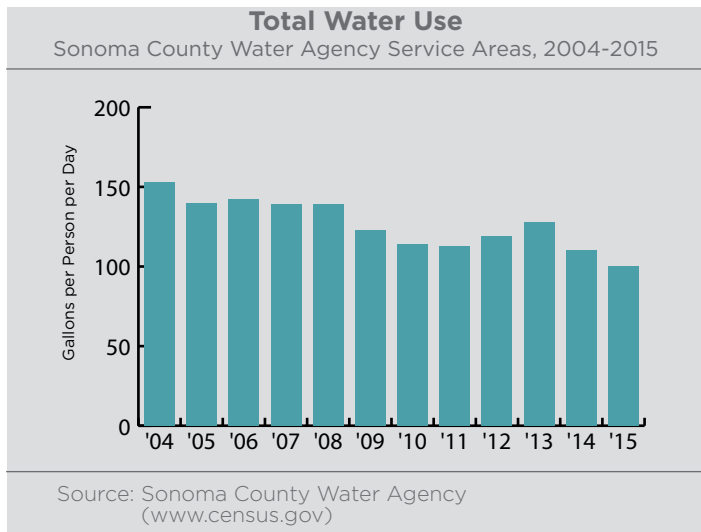
ENVIRONMENT

TOTAL WATER USE

Water usage for Sonoma County Water Agency service areas has seen a 9% decrease in per capita water usage between 2014 and 2015, falling from 110 to 100 gallons per capita per day. Reductions in water use are due to county water users responding to the historic California drought, which continues to persist throughout much of the state. The United States Department of Agriculture still classifies over 73% of the state as in a moderate drought, with over 21% in severe drought.

GREENHOUSE GAS (GHG) EMISSIONS

As of 2014, Sonoma County experienced minor fluctuations in Greenhouse Gas Emissions since 2000. However, 2014 saw the lowest levels of emission, at 3.6 million tons, contrasting with a high of 4.2 million in 2007. Transportation consistently contributes the most to emission totals, followed by electricity and natural gas (on average). Solid waste adds the least to GHG emissions. Further GHG emissions face the two-fold challenges of a growing population and increased economic activity. However, efforts such as the launch of Sonoma Clean Power in 2014 and the Sonoma County Water Agency, one of the largest energy users in the County, operating a carbon-free water system represent encouraging trends that should contribute to future reductions.



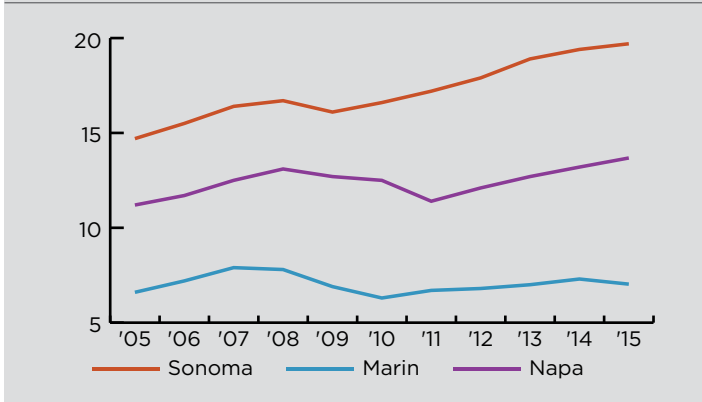
TOURISM

Tourism indicators measure the economic impact of visitors to Sonoma County. Visitor spending generates tax revenue and supports the local tourism industry workforce. Key indicators have shown sector growth.

EMPLOYMENT

Employment generated by destination spending is consistently higher for Sonoma County when compared to Napa and Marin counties. Destination spending in Sonoma County generated 19,710 jobs in 2015, up from 19,400 in 2014.

Employment Generated by Destination Spending
(Thousands of Jobs), 2005-2015

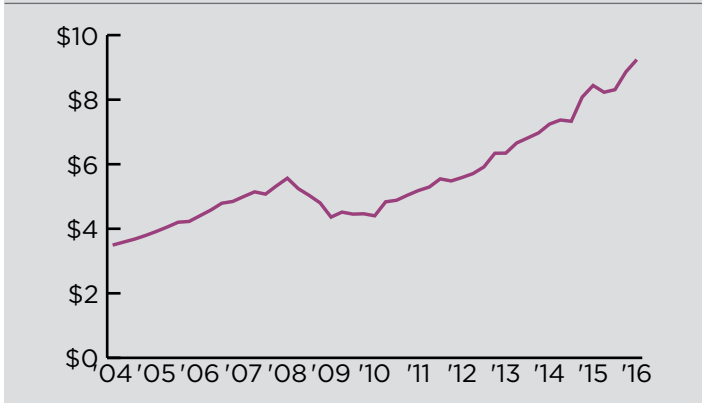


Source: Dean Runyan & Associates
(www.deanrunyan.com)

TRANSIENT OCCUPANCY TAX

The Transient Occupancy Tax (TOT) is a local tax levied on lodging property room revenues, and is an indicator of the condition and trends of the tourism and lodging industries. TOT revenues, which represent totals from the cities and all unincorporated areas in the county, increased to \$9.2 million in Q1 2016 from \$8.44 million in Q1 2015. These figures are seasonally adjusted.

Transient Occupancy Tax Revenues
(Millions of Dollars), Seasonally Adjusted, 2004- Q1 2016

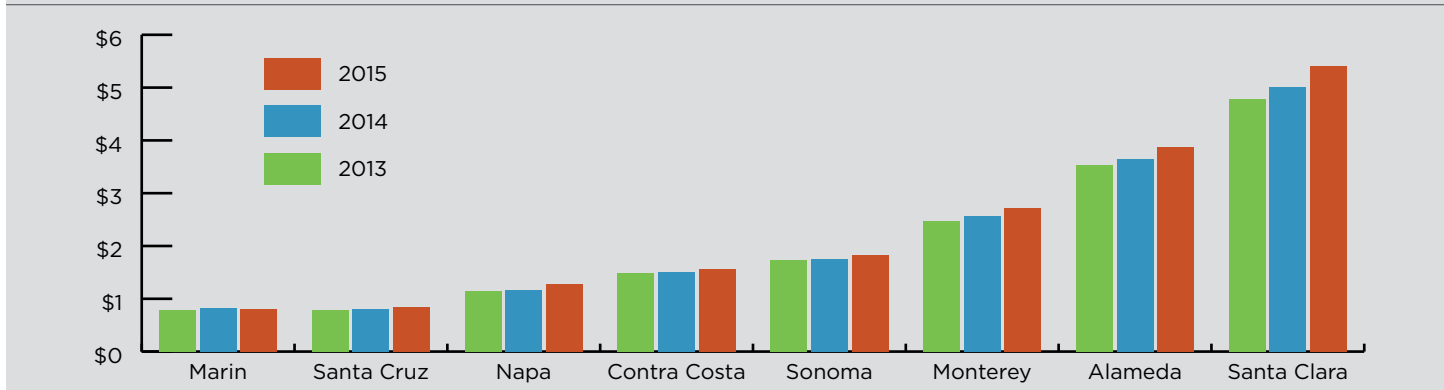


Source: Transient Occupancy Tax Report, Q1 2016
(www.sonomaedb.org)

VISITOR SPENDING

Visitor spending measures the amount of money tourists spend and what they spend it on when they visit Sonoma County. Total visitor spending was \$1.82 billion in 2015. The largest share of visitor spending went towards food and beverage services (27.7%).

Total Direct Spending, by County
(Billions of Dollars), 2013-2015



Source: Dean Runyan & Associates
(www.deanrunyan.com)



SOURCES

The 2017 *Abridged Sonoma County Indicators* provide a comparative study on various economic, demographic, environmental, and social aspects of Sonoma County. Sonoma County Economic Development Board (EDB) research originates from information available from outside resources and previously published material. The 2017 *Abridged 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.

Interested readers are encouraged to contact data source agencies or organizations for further research or visit our website www.sonomaedb.org for the unabridged version of Indicators to be released in Spring of 2017. Readers are also invited to suggest indicators for future reports by calling (707) 565-7170 or emailing edb@sonoma-county.org.

DATA SOURCES

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Sean Werkema led the project, gathering data and managing and editing the report's overall layout and content. He specifically prepared the By The Numbers, Quality of Place, and Economy sections.

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