



# Sonoma County Economic Development Board

INDICATORS

# Sonoma County Measures Up

## 2003

*An Index of Sonoma County's Community and Economic Vitality*

*Presented in partnership with the Sonoma County Workforce Investment Board*

# Purpose

Dear Readers,

Rated as one of the best places for businesses by *Forbes Magazine* (2002), Sonoma County is located in the North Bay, and includes nine cities within its borders. The county's success is based on its stable and productive economy against the backdrop of beautiful vineyards, redwoods and miles of Pacific Ocean coastline. The driving sectors in this dynamic economy are agriculture, financial/professional services, health, retail, tourism and technology.

The Indicators provided in this report are a profile of many of Sonoma County's demographic, economic and social factors using the latest available data. Where possible, this information is compared with data from other areas to illustrate the similarities and differences among proximate regions. Much of the information on Sonoma County also is provided at the city level. This Indicator report also:

- Incorporates input from a variety of sources
- Illustrates trends across time periods
- Reflects the potential long-term health of Sonoma County

The Indicator report is a baseline document. Over the next several months, a two-tiered effort will transpire to build upon and improve this report. First, groups with expertise in various categories will be asked to participate in developing an analysis of the data and trends shown in the various graphs. This process will result in providing the reader with more information regarding why the data presented is important, how Sonoma County compares with other areas, what local efforts are underway to address the issues contained in the data, and the like. Second, additional comparative indicators will be developed for display in the next edition of *Sonoma County Measures Up*.

This report is one of many offered by the EDB, which provides assistance services directed at encouraging the startup, retention and expansion of Sonoma County businesses and jobs, as well as the diversification of economic activity. The EDB, in partnership with the Sonoma County Workforce Investment Board (WIB), produces numerous reports and statistics on the region. The EDB thanks the Sonoma County WIB for their support in this project.

Yours sincerely,



Ben Stone  
Director

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# Summary & Observations

The 2003 Index illustrates the historic and current status of the local economy and community. Much of the data is connected, yet the relationships are complex, and open to many interpretations. The following paragraphs are a summary of the key topics shown in the indicators. Nine focus areas comprise much of the vitality of the area's quality of life and local economy, and each section includes several different charts. Sonoma County's various facets are displayed, including:

**Demographics (p.6 ff):** Sonoma County is less populated than Oakland, San Francisco and San Jose, but the population increased by 60,000 between 1991-2001. The population diversity in Sonoma County has experienced a 77.5% change between 1980-2000, and is showing trends similar to the Bay Area. Within the county, whites represent the largest percentage population in all cities, followed by other (e.g. multiple ethnicity), Hispanics, Asians, African Americans, and American Indians.

**Employment (p.9 ff):** The workforce in the Santa Rosa Metropolitan Statistical Area (MSA includes all of Sonoma County), is equivalent in labor force to the Vallejo MSA, but falls far short of the East Bay, San Francisco and San Jose. However, Sonoma County experienced a lower unemployment rate throughout the last decade than the East Bay. Sonoma County also experienced a net gain in manufacturing and service jobs, with no decrease in either of the categories between 1999-2001.

**Economics (p.13 ff):** While local inflation rates are not available for Sonoma County, the encompassing San Francisco MSA experienced an increase in prices of approximately 3% between 1996-2001 and a sharp decrease in 2002. Taxable sales have fluctuated, with 3rd quarter 2001 sales lower than the year before; Santa Rosa produced the most taxable sales within Sonoma County.

**Real Estate (p.16 ff):** Sonoma County, along with the rest of the Bay Area and California, continues to face the challenge of meeting the workforce housing gap; the distance between the categories expanded between 1991 and 2001, with Santa Rosa, Sonoma, Petaluma and Rohnert Park having the largest gaps. Furthermore, new single family units numbered over 1,800 in the year 2000, with median home prices rising continuously between 1998 and 2002; the Bay Area, however, still has higher home prices. Office, retail and industrial vacancies have increased over the last two years, with office space having the highest vacancy rates.

**Transportation (p.22 ff):** One-way average commute time for Sonoma County is slightly less than Alameda and Contra Costa Counties, but is higher than San Francisco or Santa Clara. The use of alternate commute modes, such as car pool, transit, bicycling or walking, is higher in Alameda, Contra Costa and San Francisco than Sonoma County.

**Tourism (p. 25 ff):** Sonoma County received 1.24 percent of tourists visiting California in 1999, keeping its share fixed at approximately the same percentage since 1992. The most popular accommodations for travelers are hotels, motels and B&B's and day trips requiring no overnight stay. As one of the major industries in the county, employment, earnings and tax revenues from tourism have continuously increased between 1992-2000.

**Environment (p.28 ff):** Sonoma County does not have many days above the National 8-Hour Ozone Standard, but its inclusion within the San Francisco basin by the Air Resources Board for tabulation skews the environment rating for the county.

**Education (p.30 ff):** Sonoma County is comparable to the rest of the Bay Area, with scores on the STAR test, AP Index, and SAT averaging the same as Alameda and Contra Costa counties, and is much higher than the overall California scores. Educational attainment continues to improve within the County, but this is off-set by decreased enrollment by 10th and 11th graders in Intermediate Algebra, a lower percentage of high school students eligible for CSU and UC, and a higher high school dropout rate.

# Summary & Observations

**Social Equity (p.40 ff):** Real per capita income has decreased within the last few years, while per capita personal income has increased between 1998 and 2000. The number of food stamps distributed has remained constant, while CAL Works caseloads have decreased. Low birthweight rates reversed their upward trend from the year 2000. The health indices are also comparable with other counties, with high immunization rates, analogous cost of childcare and low death rate due to coronary disease relative to California. Crime rates are the lowest in the Bay Area, with non-violent crimes being more prominent than property or violent crimes. While the poverty rate is low compared to the Bay Area, the income limit comparisons show that many are living below the median income limit, without below the poverty line.

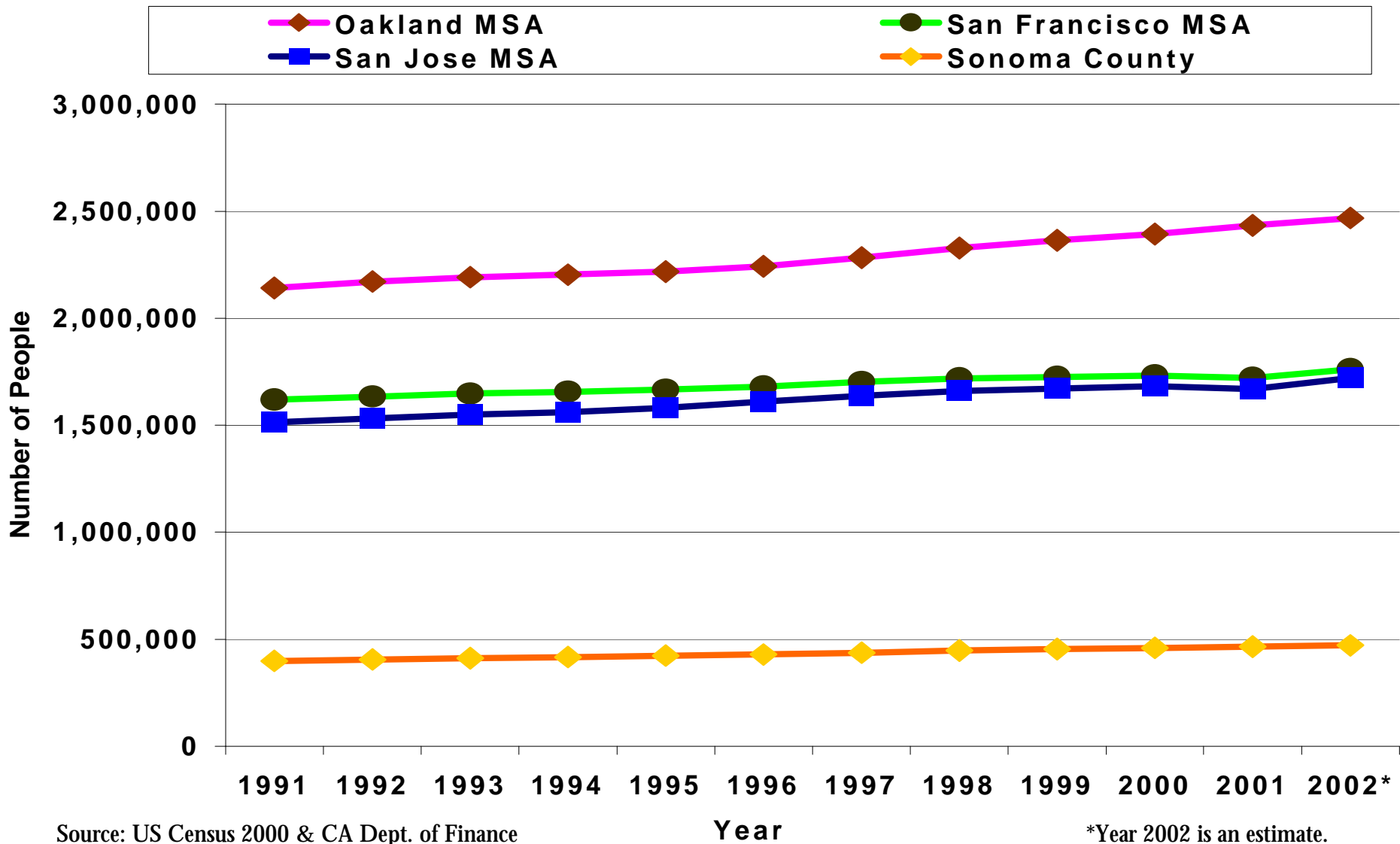
*More information is included in the graphs on the following pages.*

The following chart illustrates the changes within data sets solely for Sonoma County, organizing the indicator by the apparent trends across the listed time periods. The listing is in no particular order and does not involve analyses or predictions of future trends. Some data sets in this index may not be included in this chart because of lack of comparison with previous years.

Increasing	Decreasing	Inconclusive
<ul style="list-style-type: none"> <li>• Population</li> <li>• Diversity</li> <li>• Workforce</li> <li>• Employed</li> <li>• Electronic Equipment Jobs</li> <li>• Instruments &amp; Related Products Jobs</li> <li>• Food &amp; Related Products Jobs</li> <li>• Finance Jobs</li> <li>• Business Service Jobs</li> <li>• Health Service Jobs</li> <li>• Other Service Jobs</li> <li>• Local Education Jobs</li> <li>• Single &amp; Multi-Family Homes</li> <li>• Median House Prices</li> <li>• Office Vacancy</li> <li>• Annual Expenditures from Tourism</li> <li>• Earnings and Taxes from Tourism</li> <li>• Unemployment Rate</li> <li>• Inflation</li> <li>• Per Capita Personal Income</li> <li>• Infant &amp; Pre-School Child Care</li> </ul>	<ul style="list-style-type: none"> <li>• Retail Vacancy</li> <li>• One-way Average Commute Time</li> <li>• Use of Alternate Commute Modes</li> <li>• Employment in Tourism Industry</li> <li>• Percent of Graduates Eligible for UC &amp; CSU</li> <li>• Real Per Capita Income</li> <li>• 10th &amp; 11th Graders Enrolled in Int. Algebra</li> <li>• One-Year High School Drop Out Rate</li> <li>• Low Birthweight Infants</li> <li>• Deaths due to Coronary Disease</li> <li>• CAL Works Caseloads</li> </ul>	<ul style="list-style-type: none"> <li>• Taxable Sales</li> <li>• Employment to Housing Ratio</li> <li>• Days Above 8 Hour Ozone Standard</li> <li>• Educational Attainment of 25+</li> <li>• STAR Math Scores</li> <li>• STAR Reading Scores</li> <li>• SAT Composite Scores</li> <li>• API Scores</li> <li>• Persons Receiving Food Stamp Benefits</li> <li>• School Age Child Care</li> </ul>

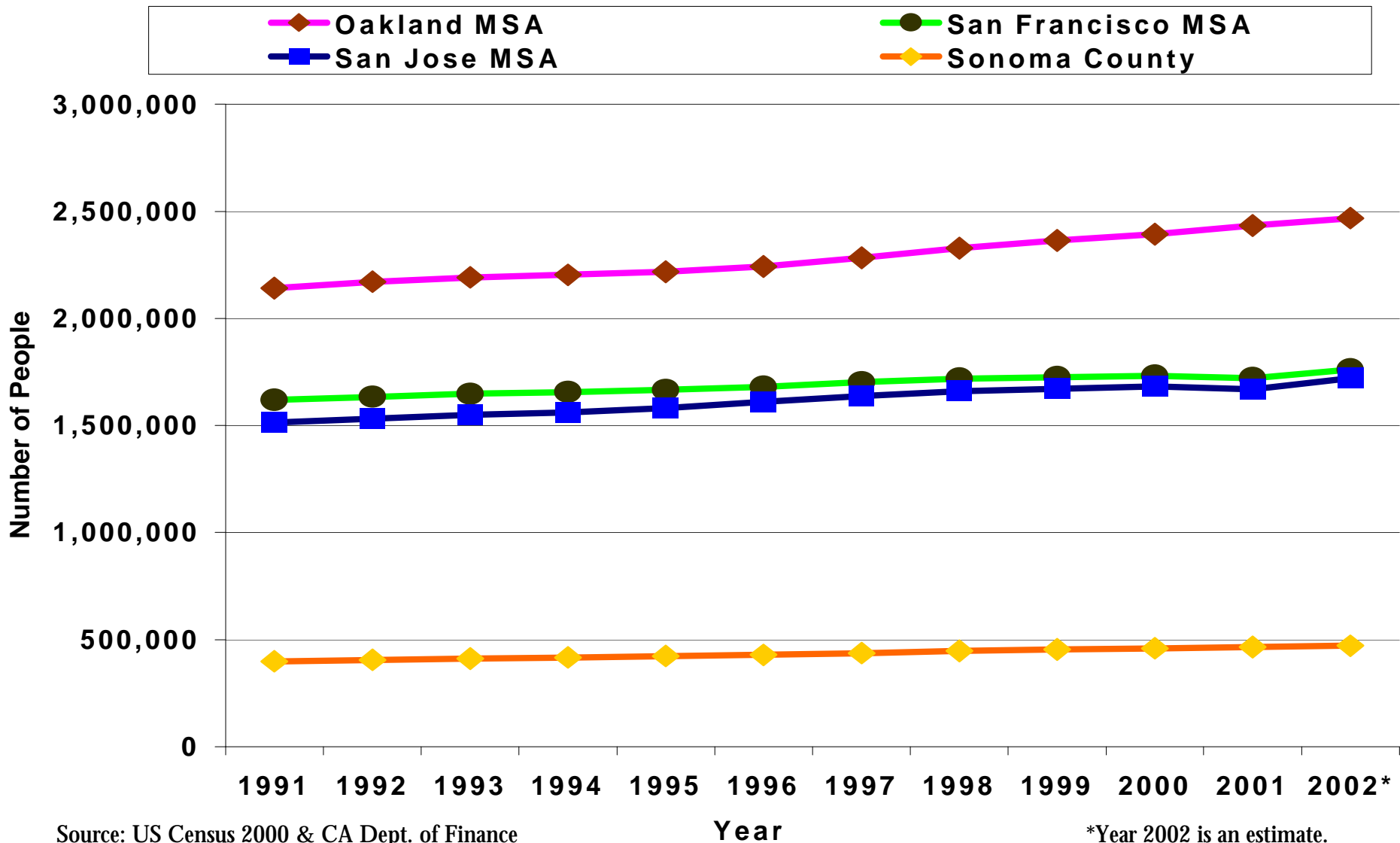
# Demographics

Bay Area Population Trends  
1992-2002



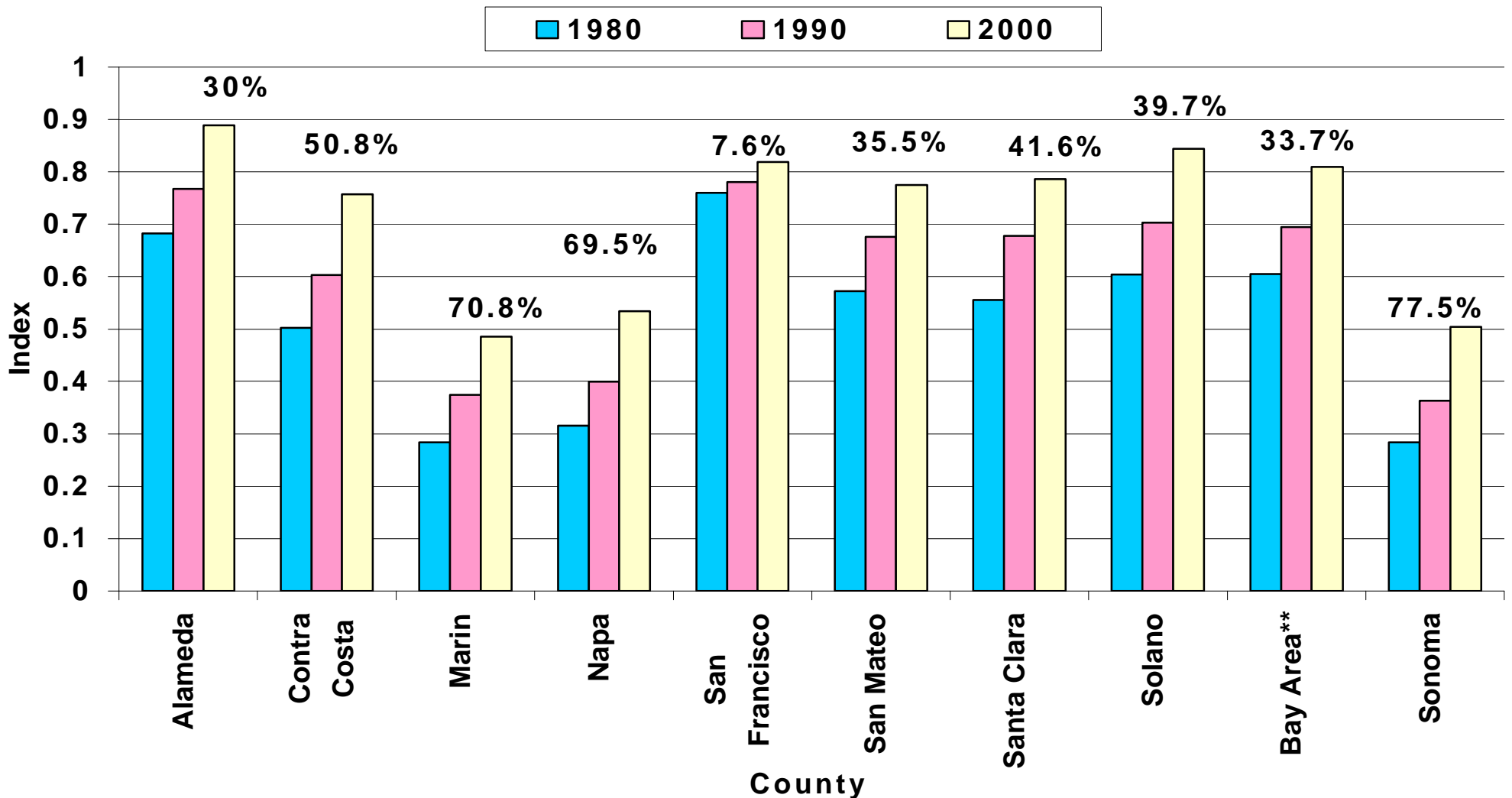
# Demographics

Bay Area Population Trends  
1992-2002



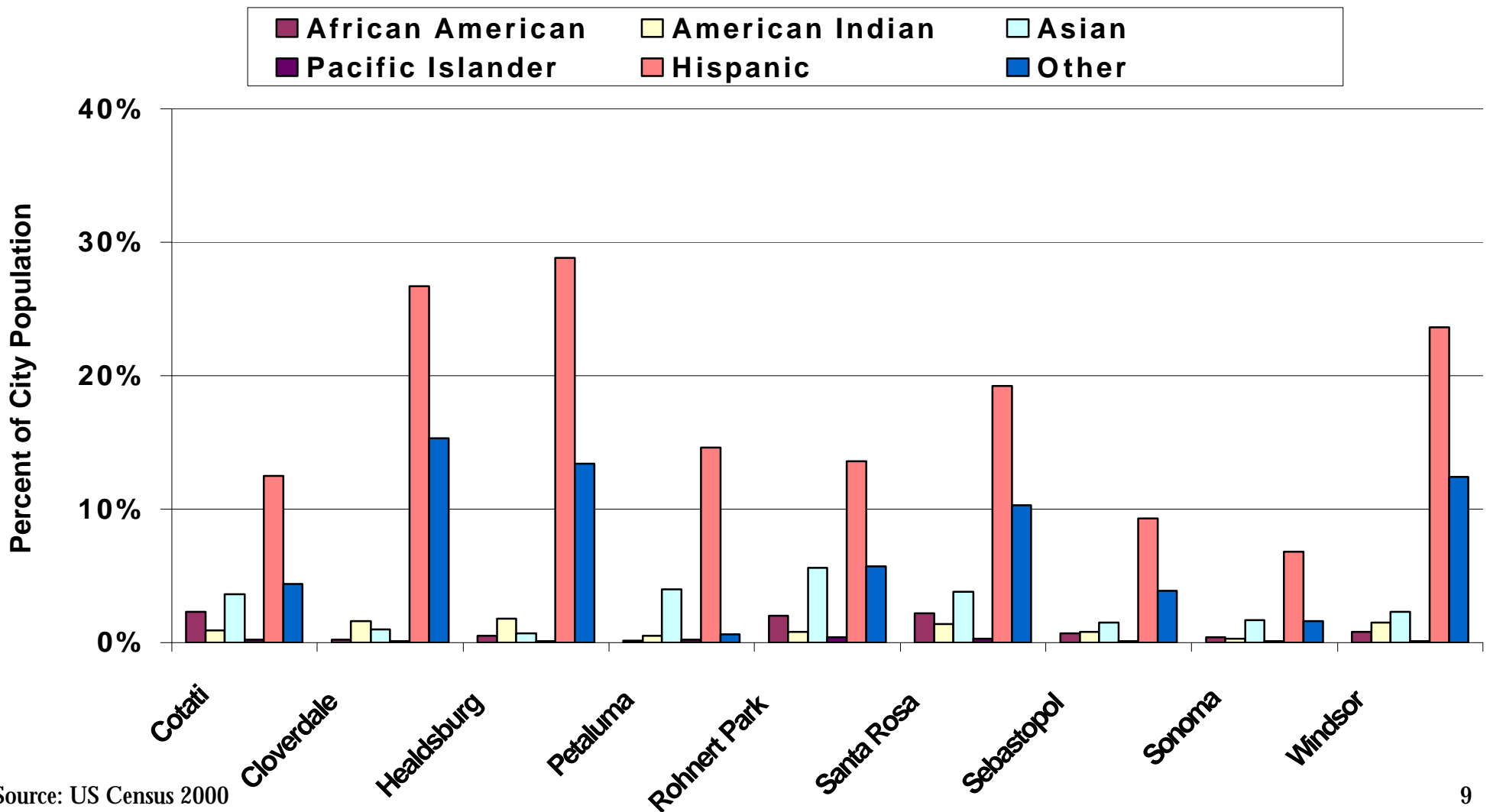
# Demographics

**Bay Area Population Diversity Index\* 1980-2000**  
 [0.0=Single Ethnic Group 1.0=Ethnicity Equally Distributed]  
 Percent Change from 1980-2000 Above Respective Index



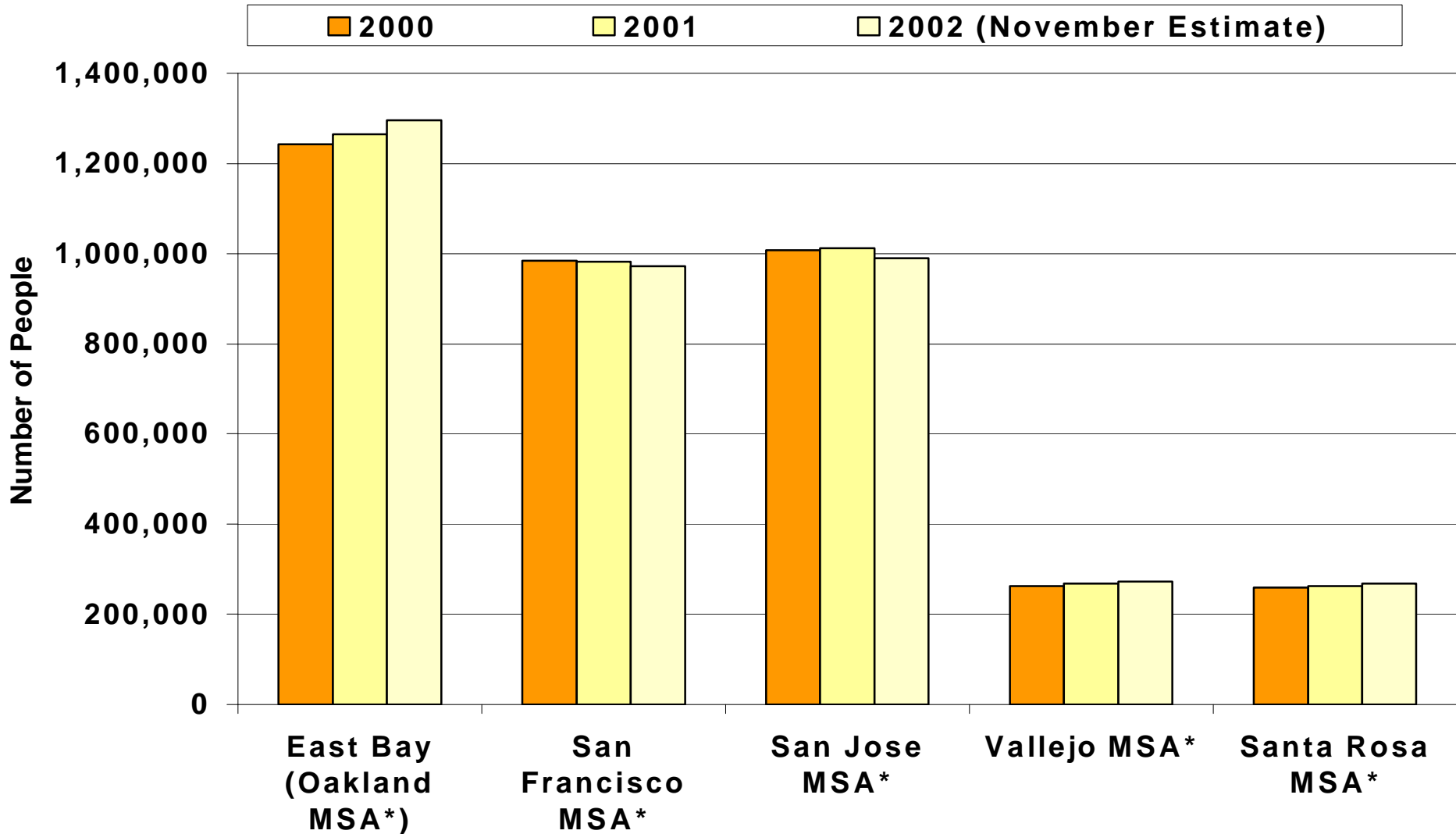
# Demographics

Comparison of Minority Population (Excludes White Pop.)  
 Cities in Sonoma County  
 2000



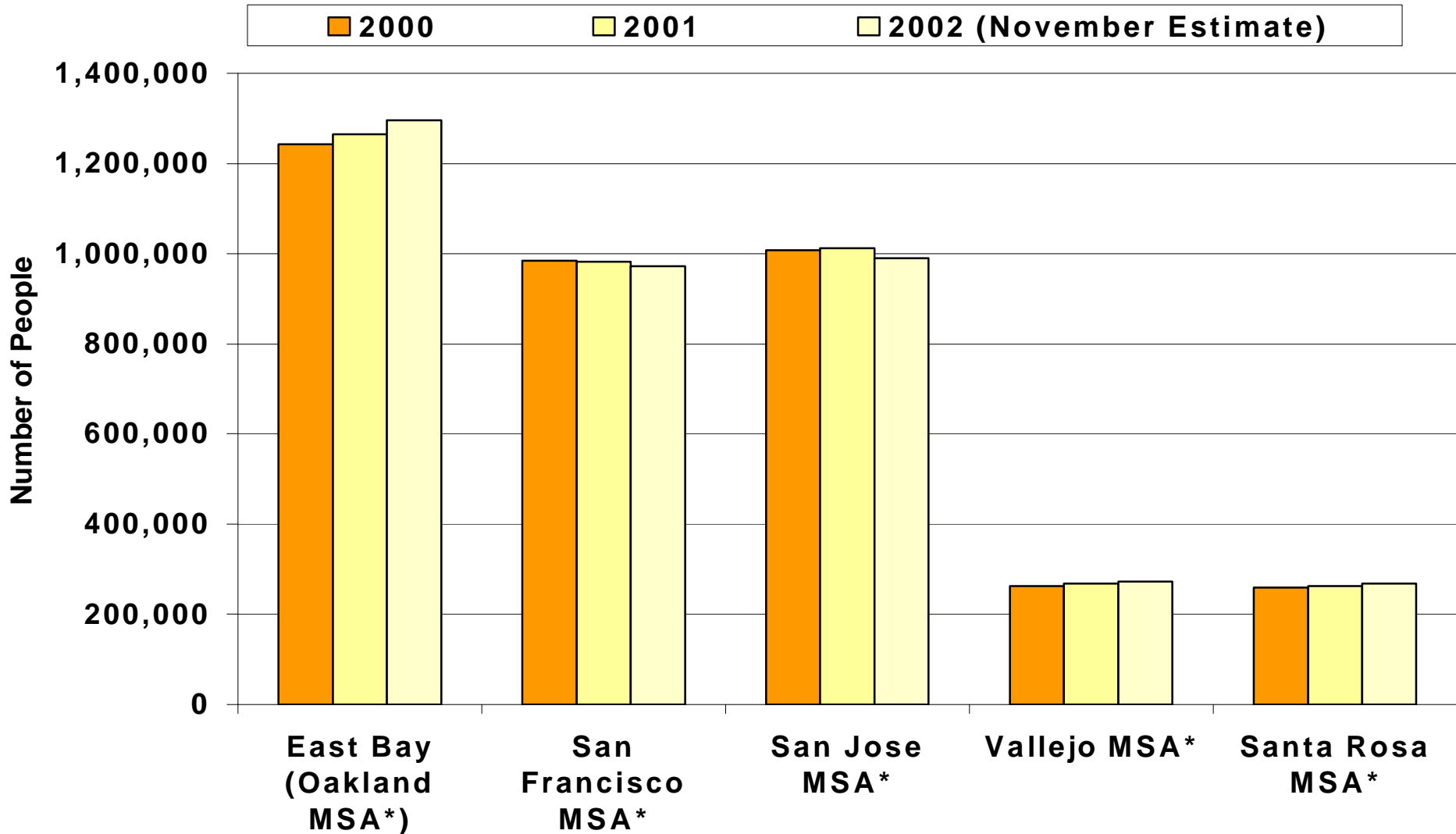
# Employment

Regional Workforce Total  
By Metropolitan Statistical Area



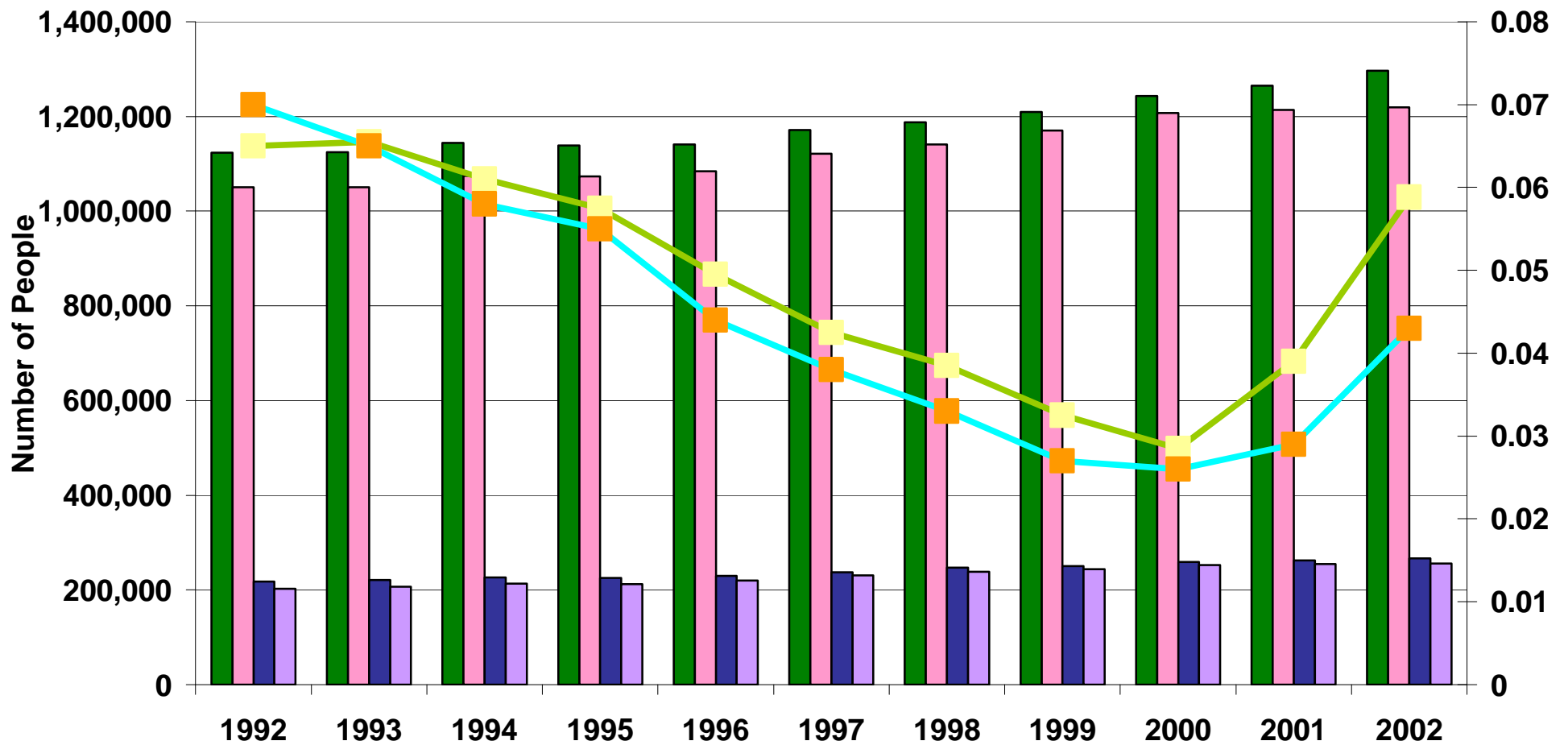
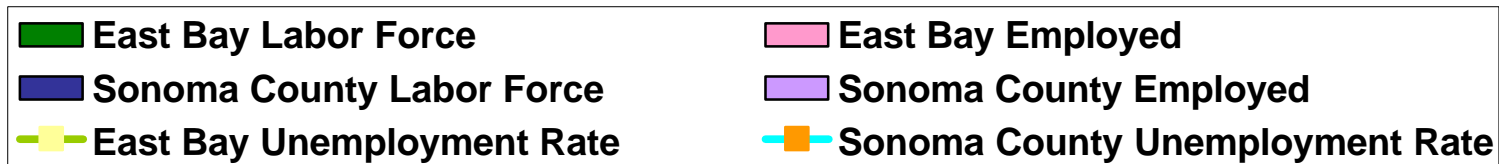
# Employment

Regional Workforce Total  
By Metropolitan Statistical Area



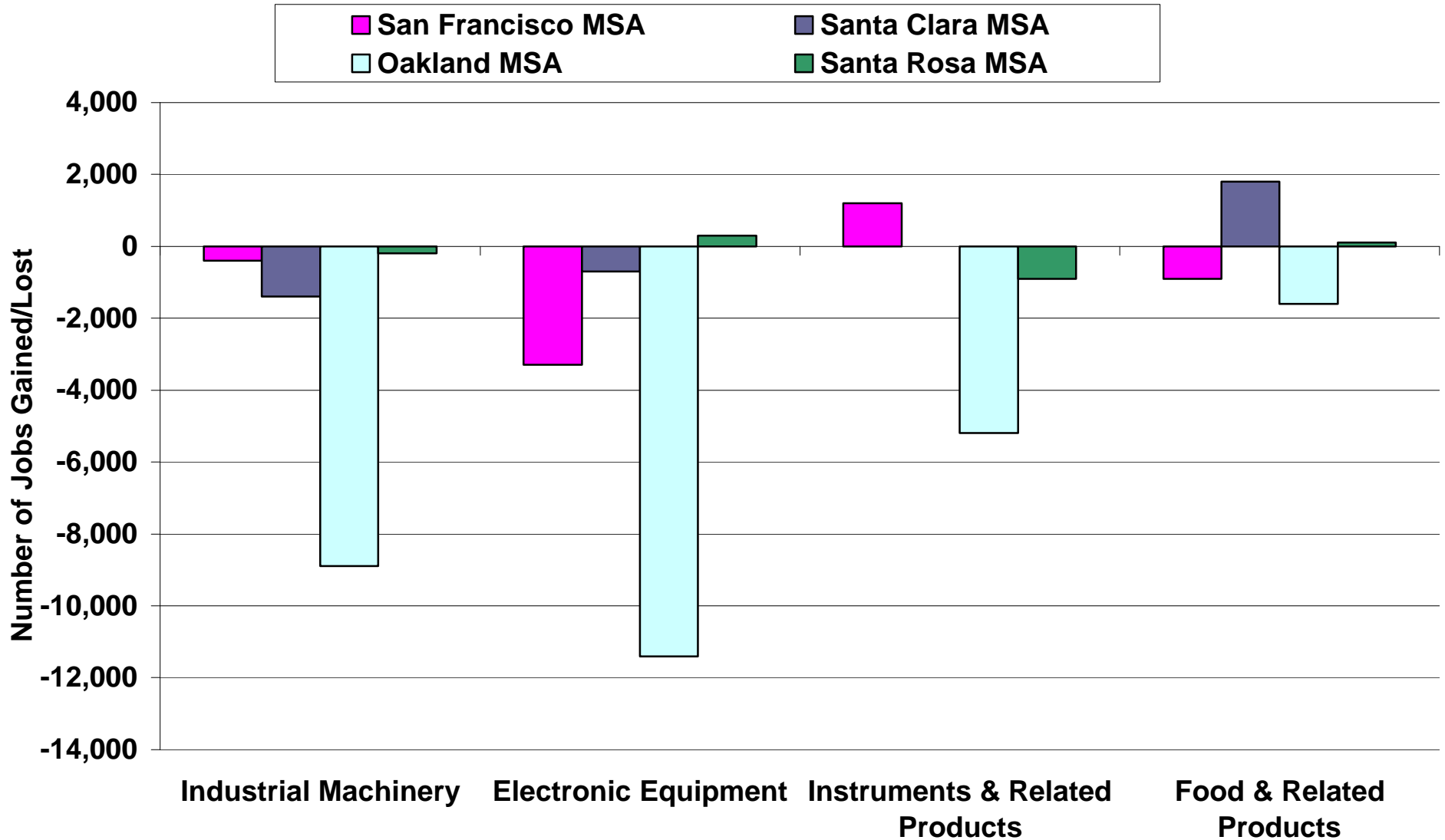
# Employment

Employment Trends 1992-2002\*  
East Bay vs. Sonoma County



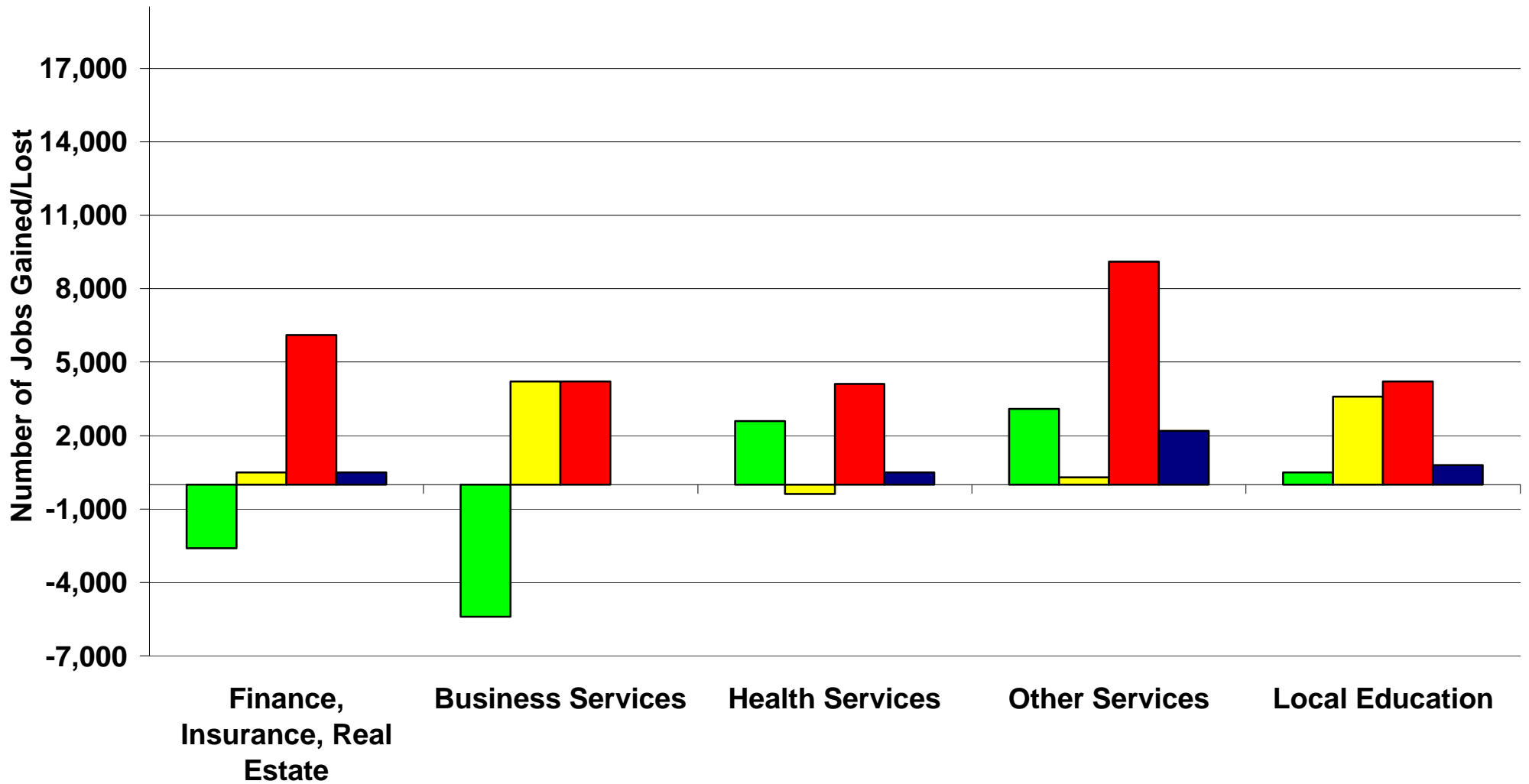
# Employment

Manufacturing Jobs Gained/Lost by Key Categories  
1999-2002\*



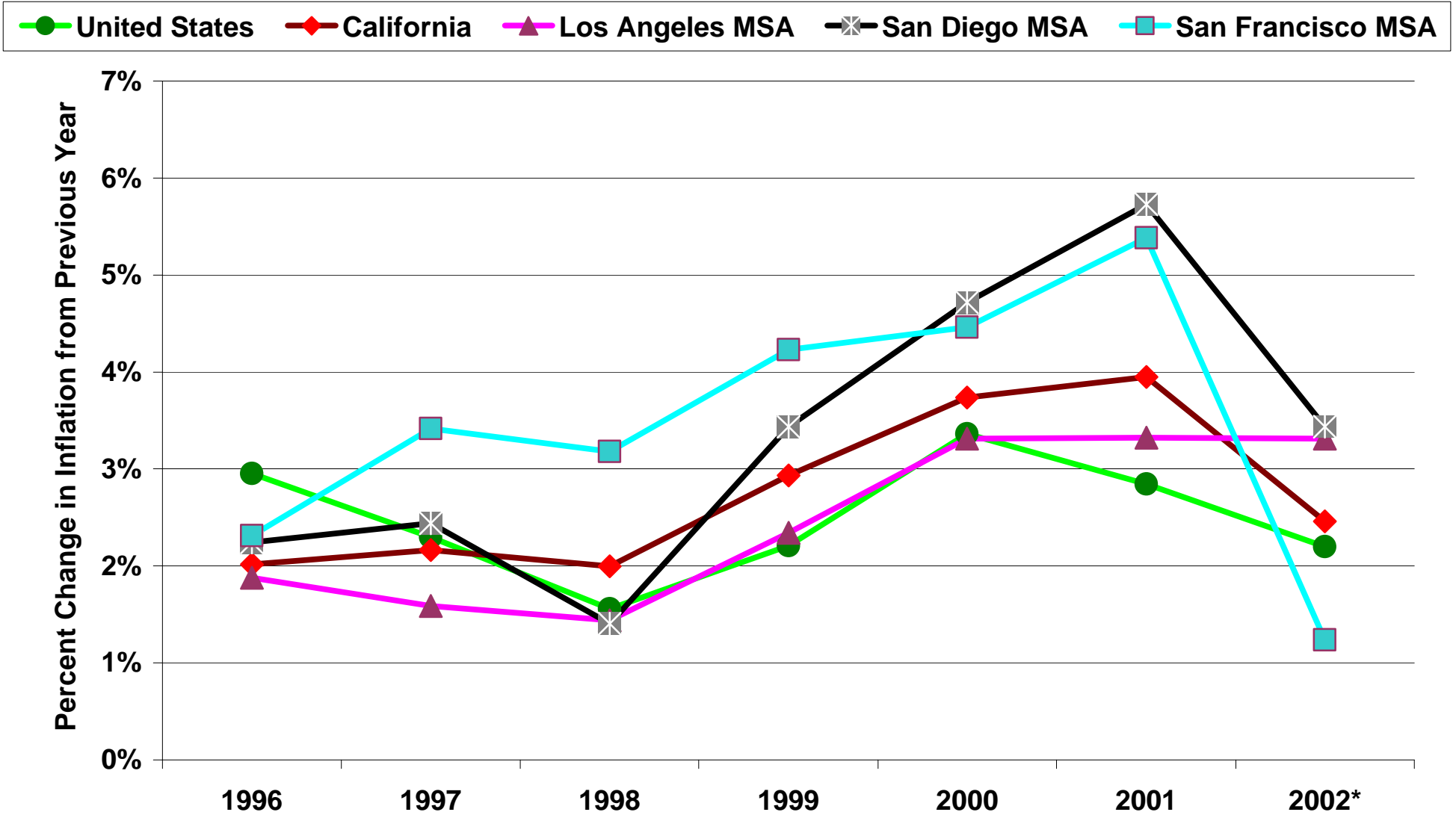
# Employment

Service Jobs By Key Categories Gained/Lost From 1999-2002\*



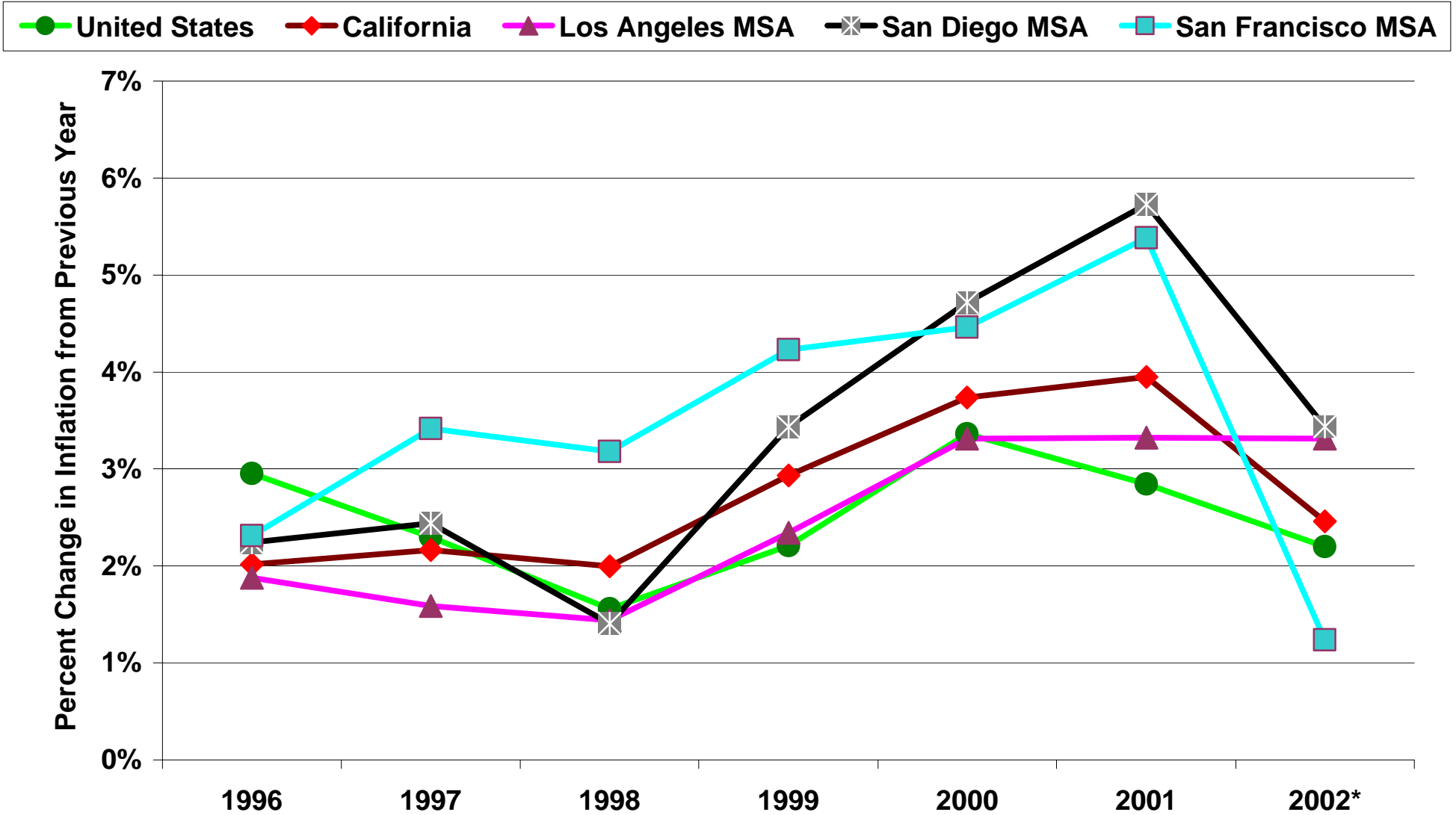
# Economics

Inflation Comparison  
1996-2002\*



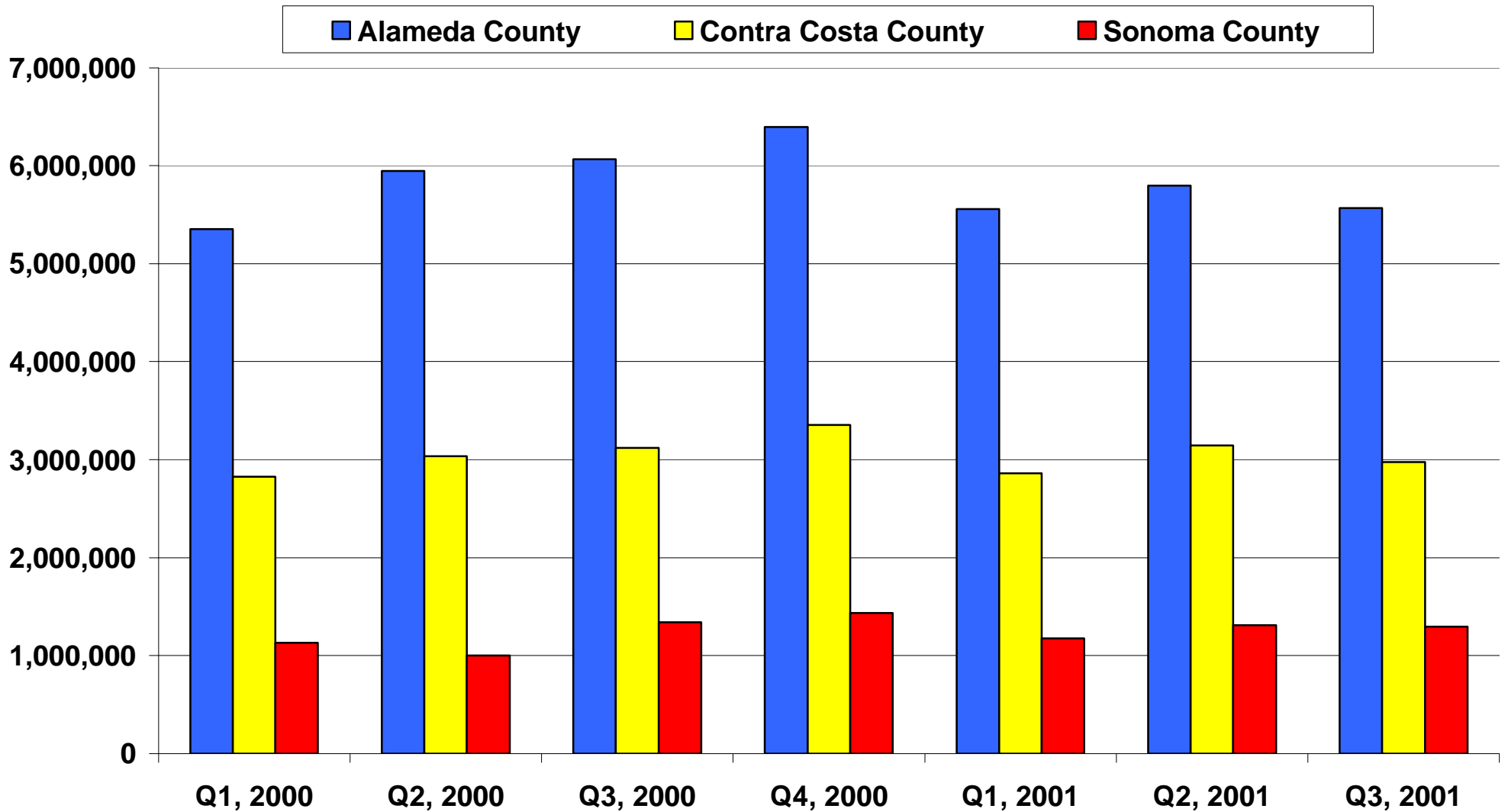
# Economics

Inflation Comparison  
1996-2002\*



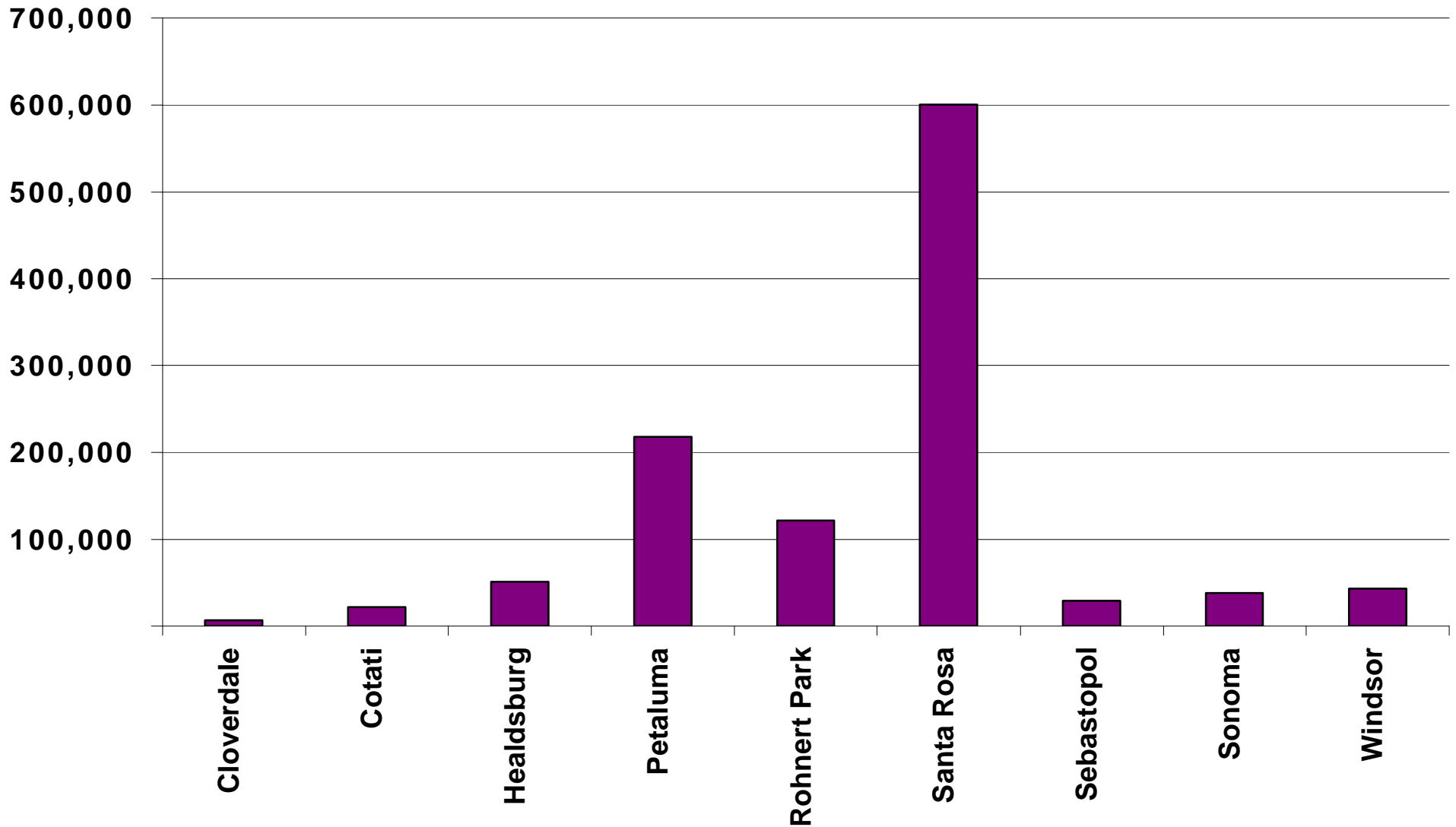
# Economics

Bay Area Taxable Sales  
East Bay vs Sonoma County  
2000-2001



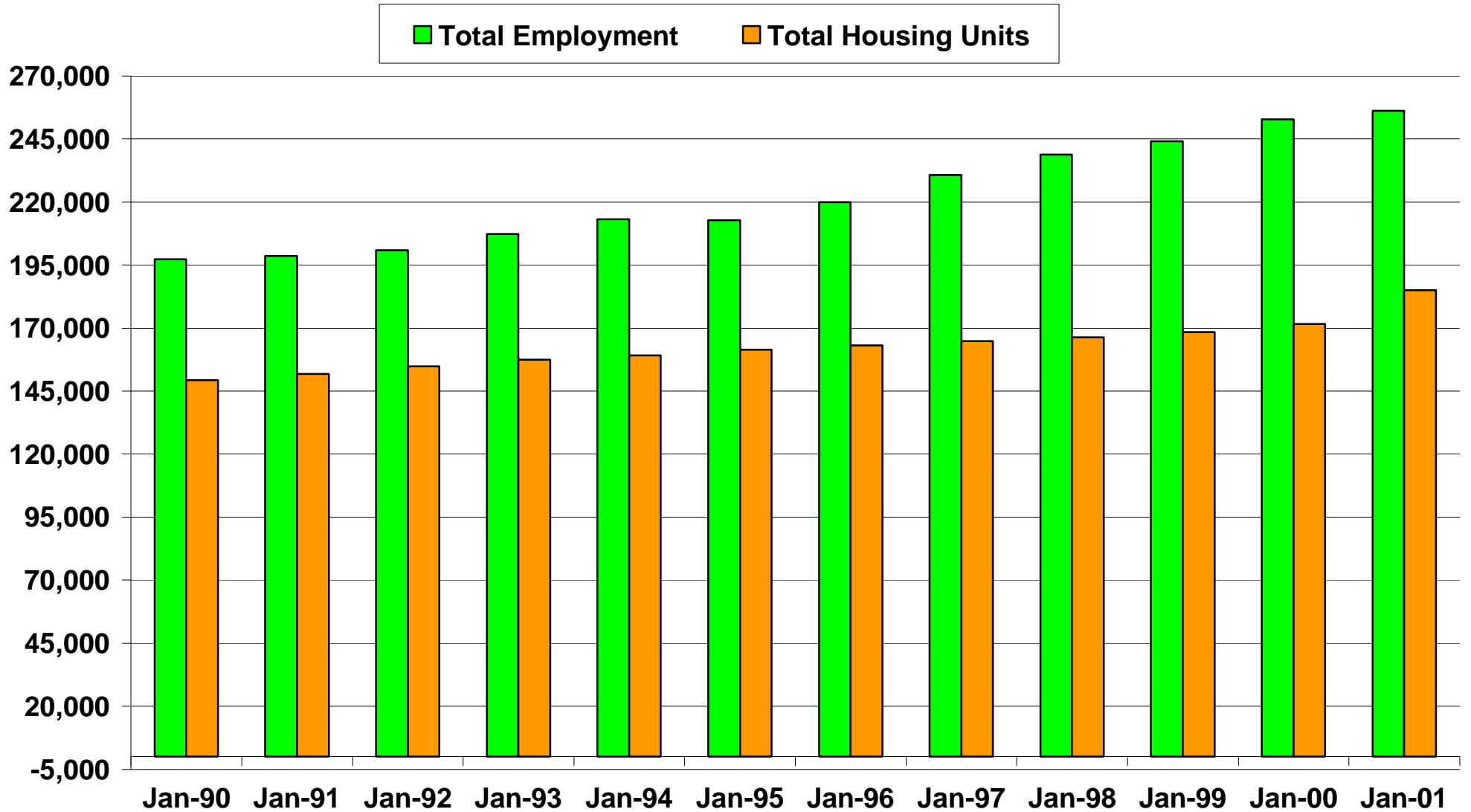
# Economics

Taxable sales by City in Sonoma County  
Quarter 3, 2001



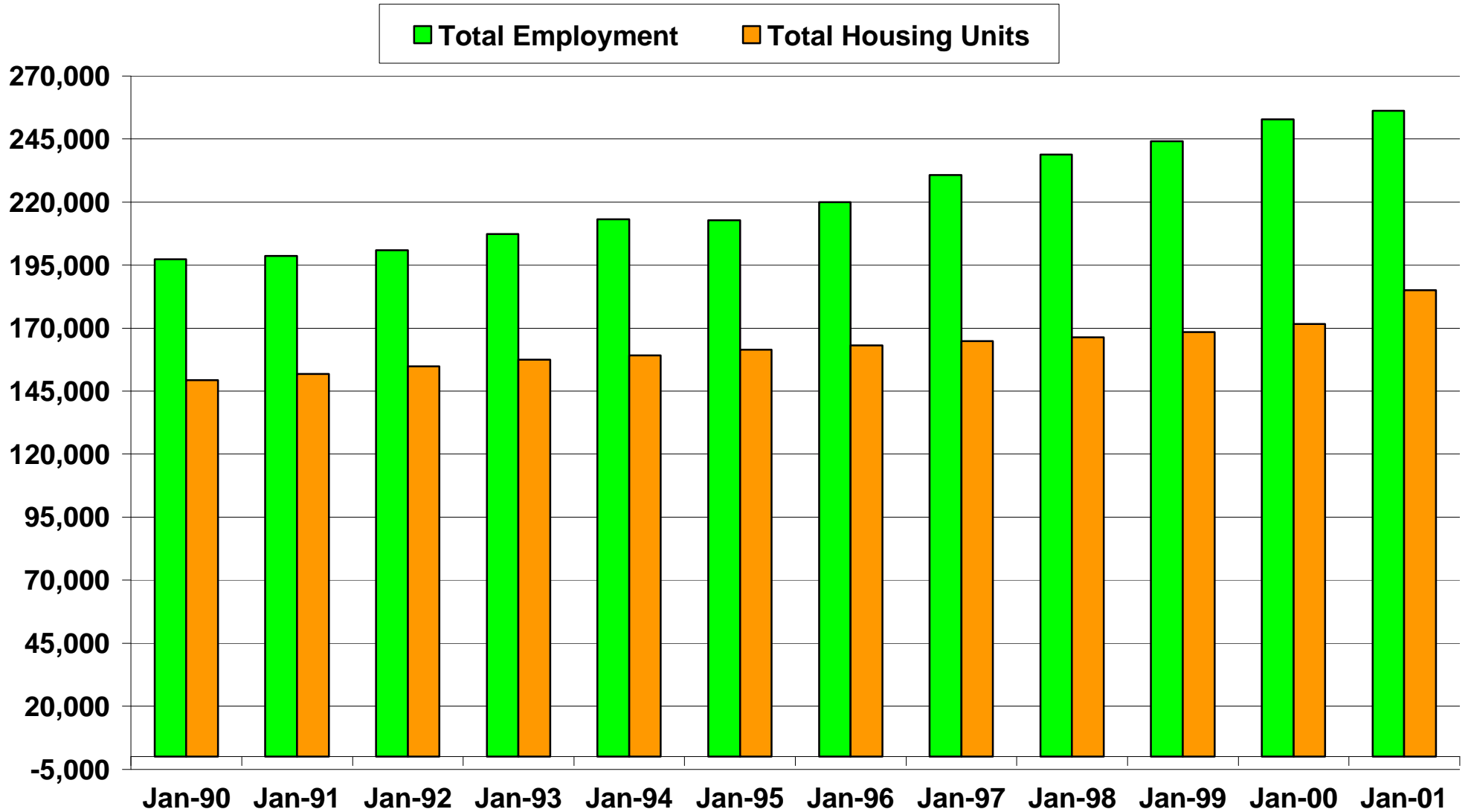
# Real Estate

Sonoma County  
Employment to Housing Ratio



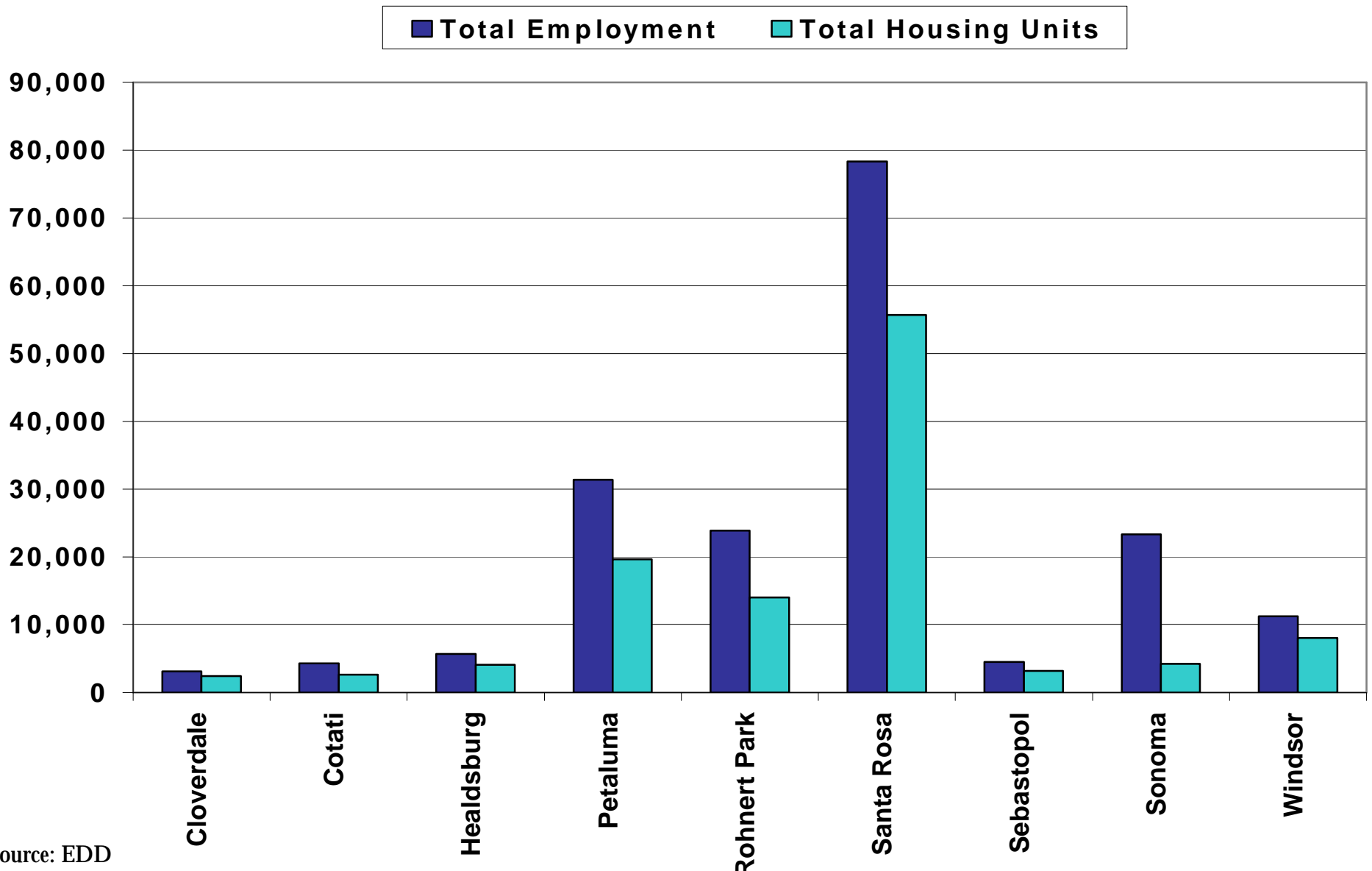
# Real Estate

Sonoma County  
Employment to Housing Ratio



# Real Estate

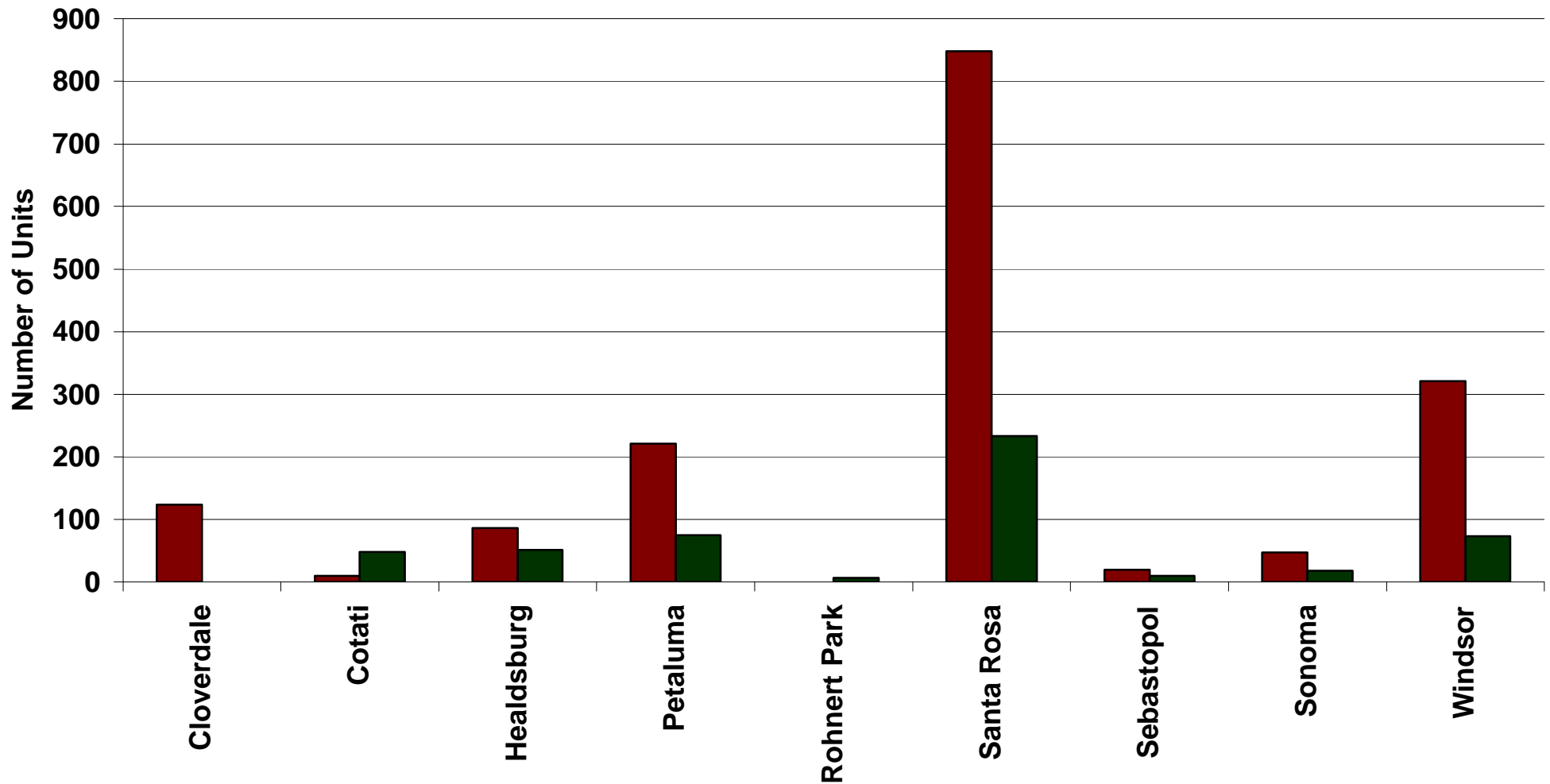
Comparison of Cities in Sonoma County, 2001  
Employment to Housing Ratio



# Real Estate

Sonoma County New Housing Units  
2000

■ Single Family ■ Multi-Family

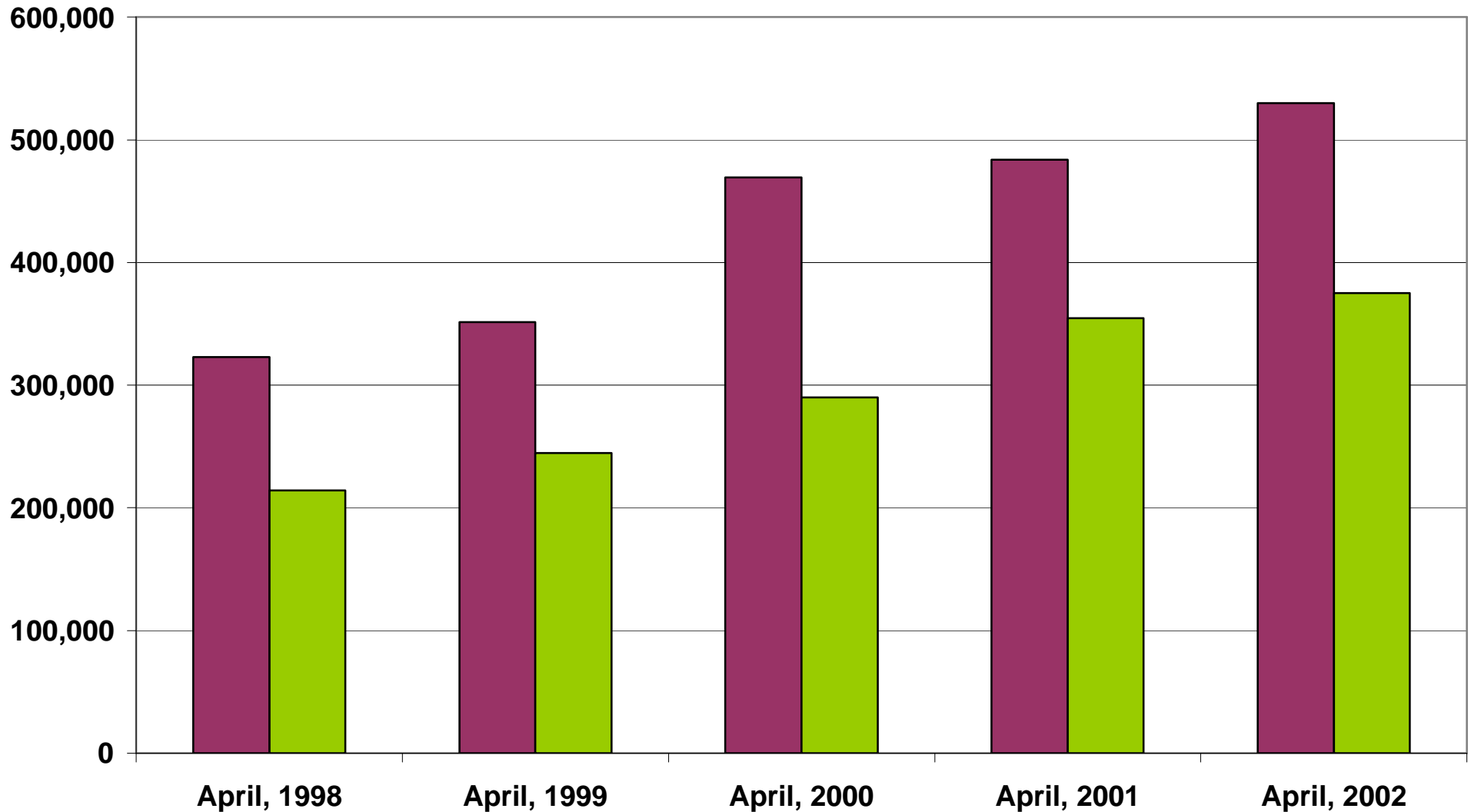


# Real Estate

Median House Price (2000): \$288,000  
Median House Price (2002): \$313,500  
Average Mortgage (2000): \$1,504  
Average Rent (2000): \$890

### Comparison of Median Home Prices

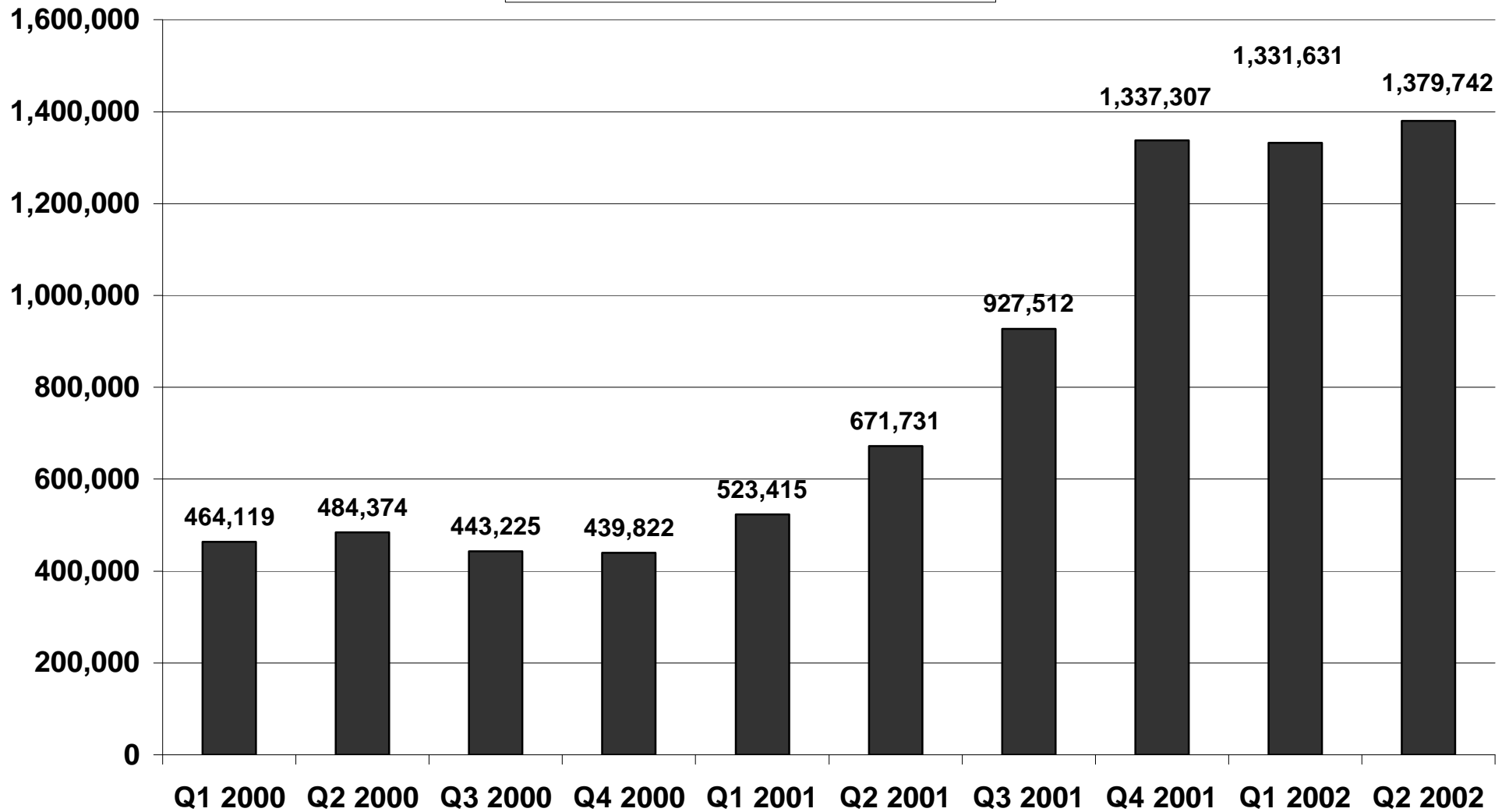
■ Bay Area\*    ■ Sonoma County



# Real Estate

Total Office Vacancy in Sonoma County  
Q1 2000-Q2 2002

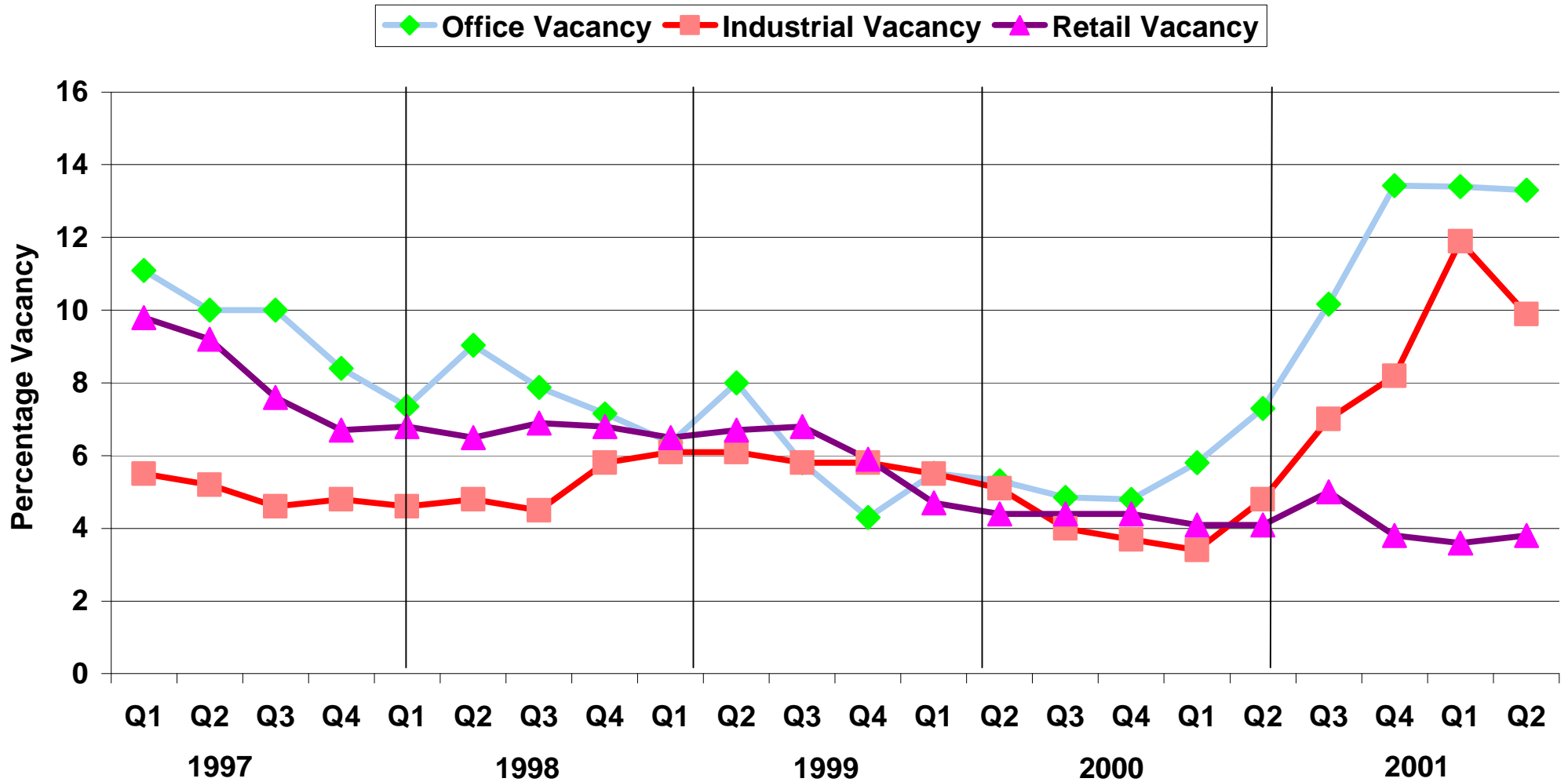
■ Total Existing Vacancy (sq ft)



Source: Keegan & Coppin/Oncor International

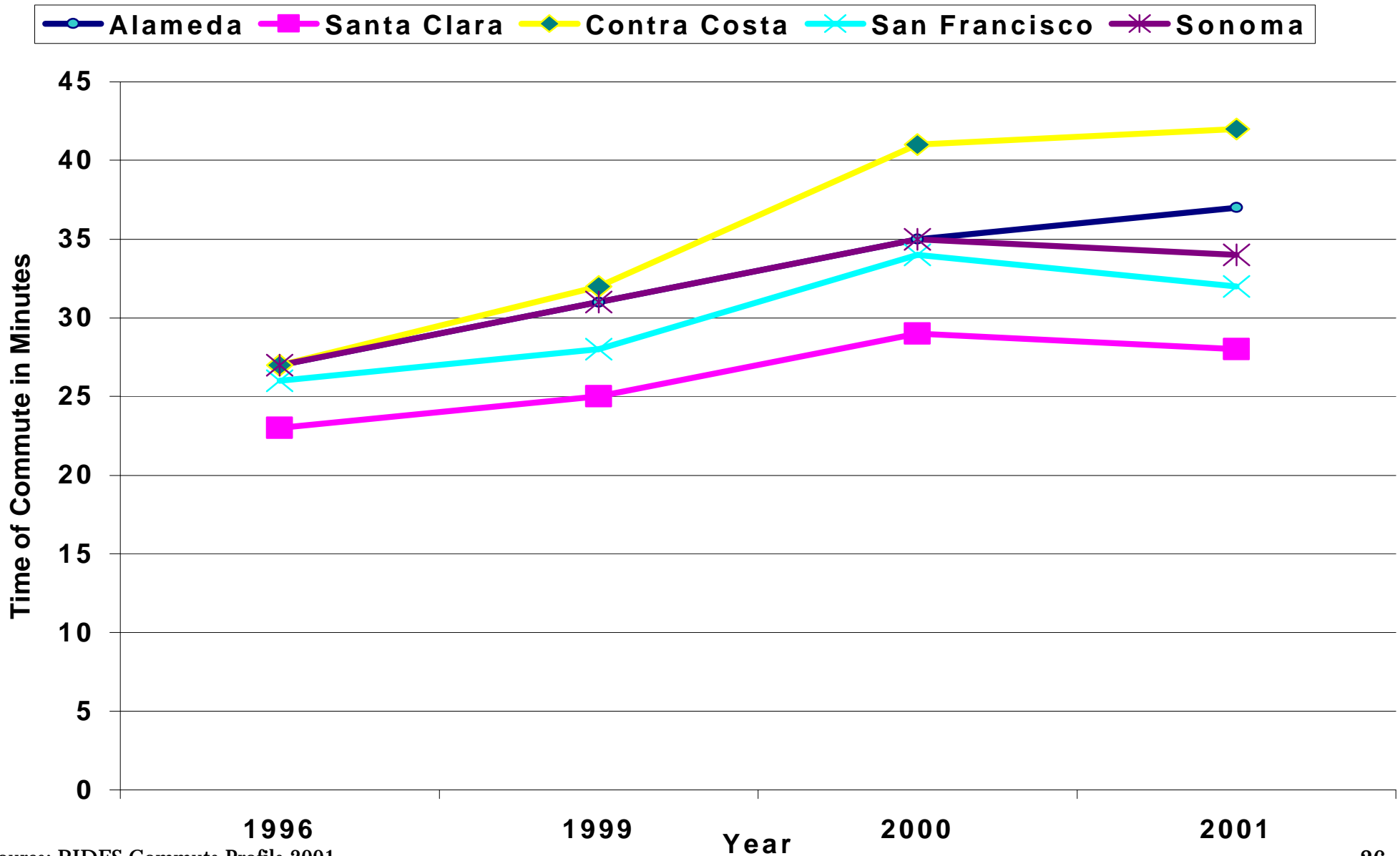
# Real Estate

## Vacancy Trends in Sonoma County



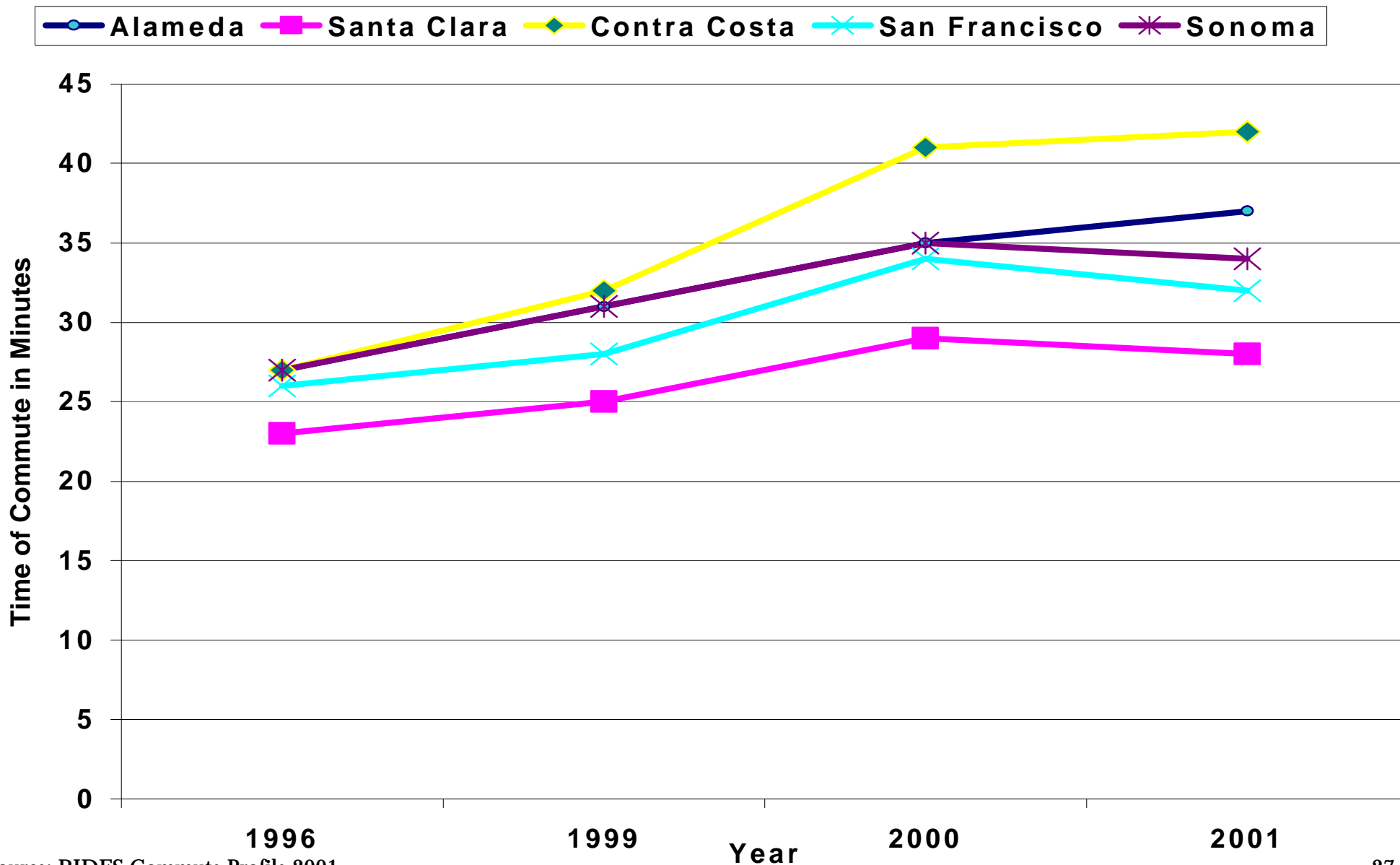
# Transportation

One-Way Average Commute Time by County of Residence



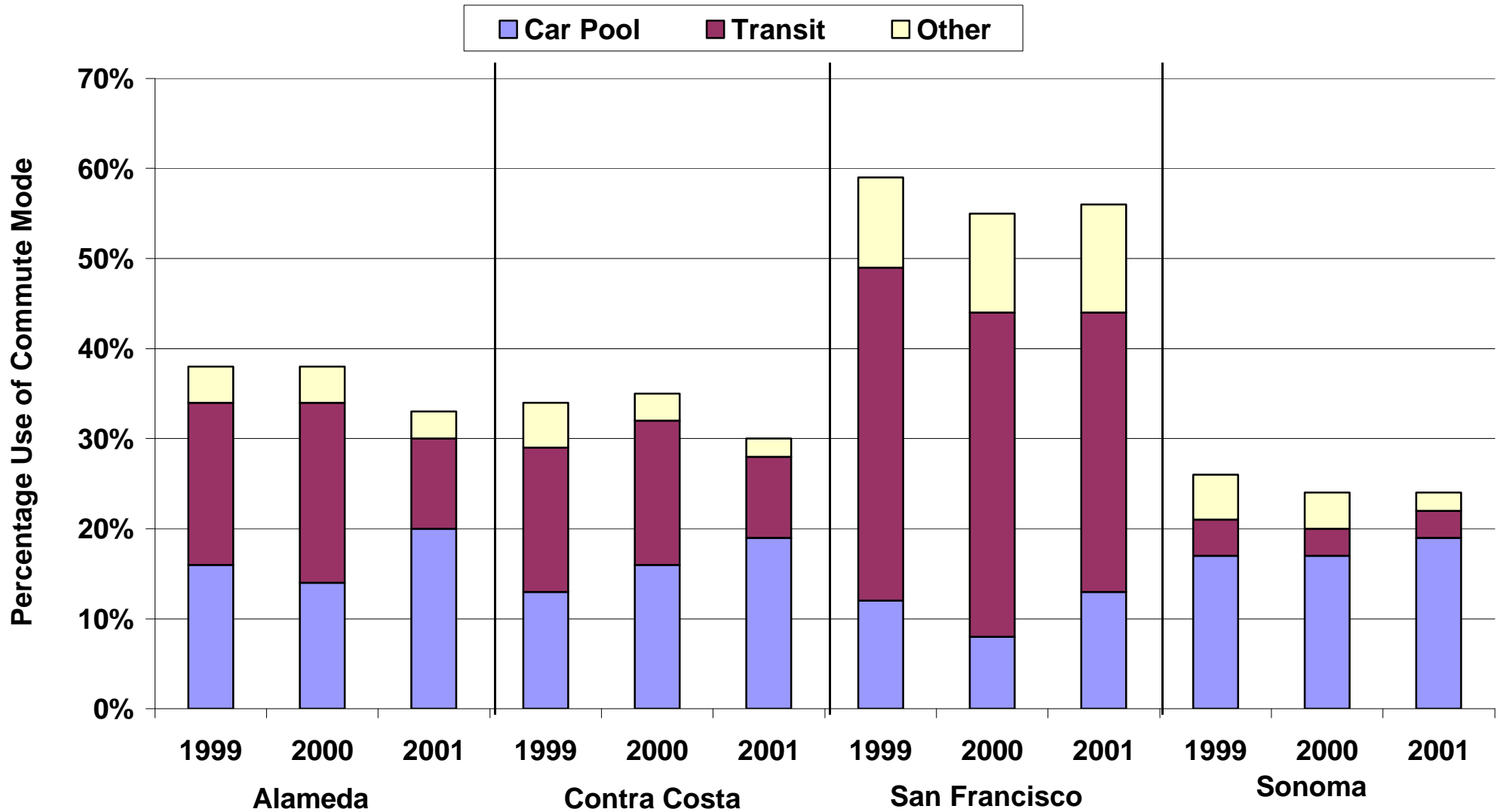
# Transportation

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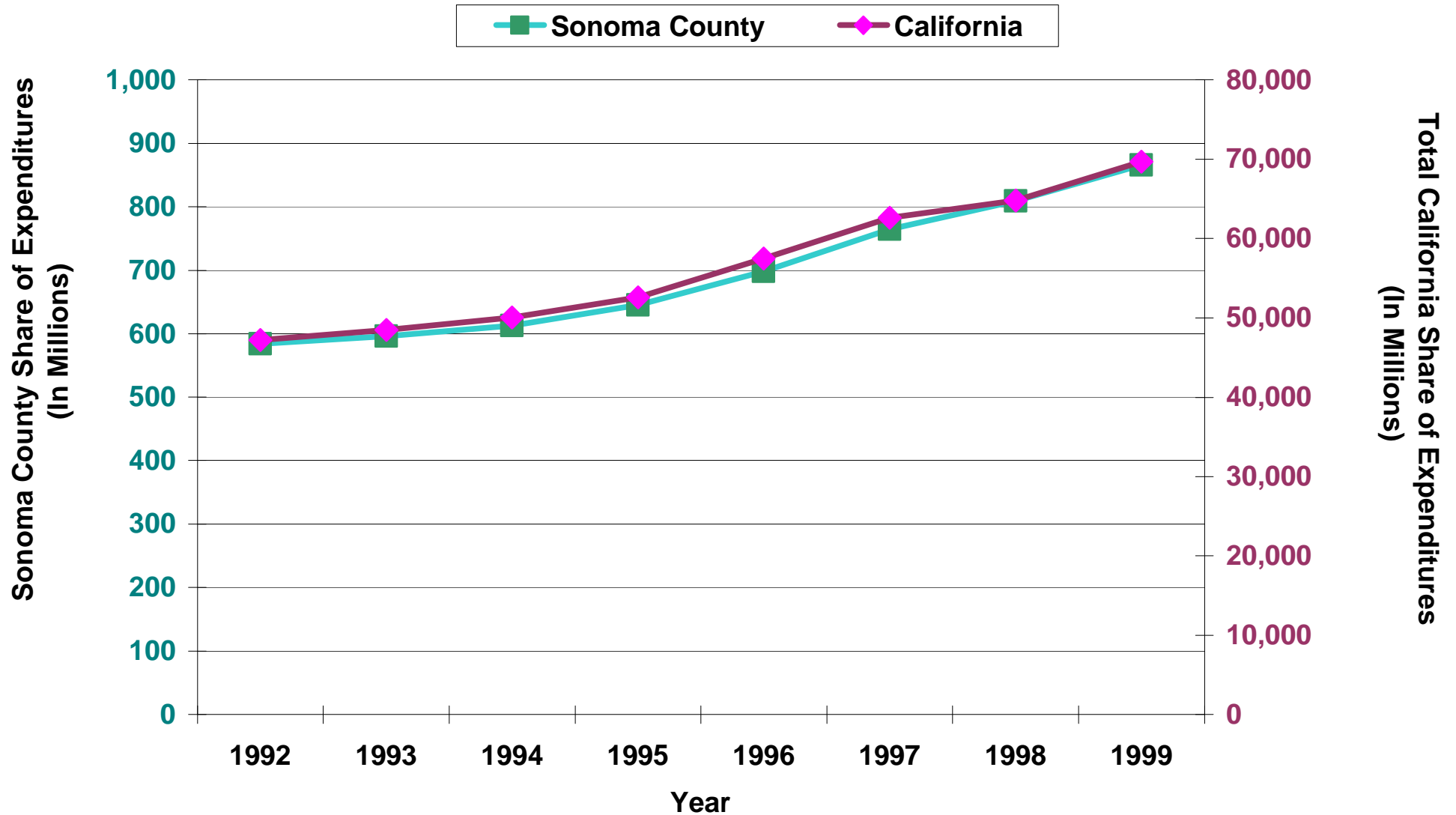
# Transportation

Alternate Commute Modes  
Percentage Used in Relation to All Commute Modes



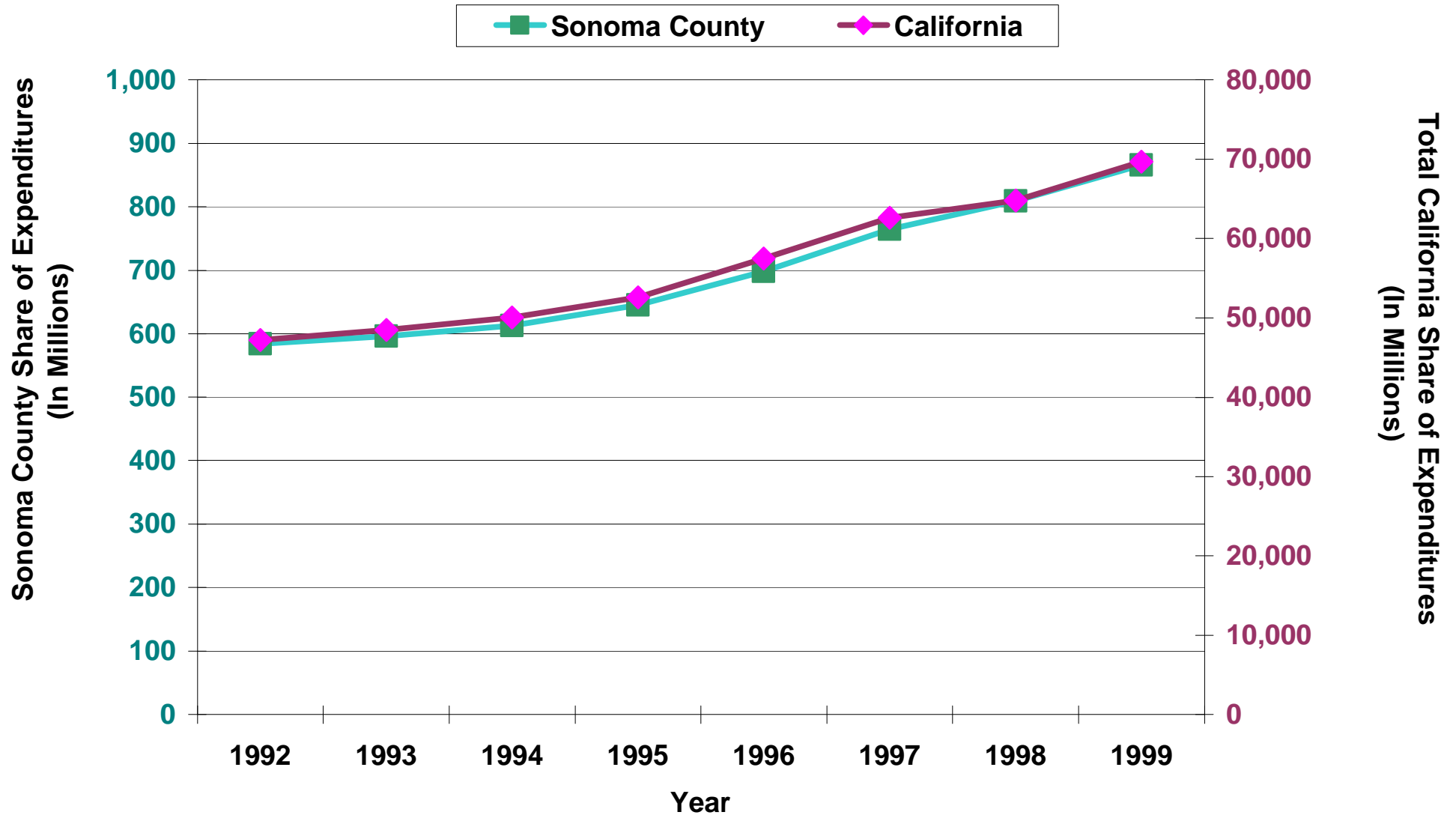
# Tourism

Total Annual Expenditures by County and State, 1992-1999



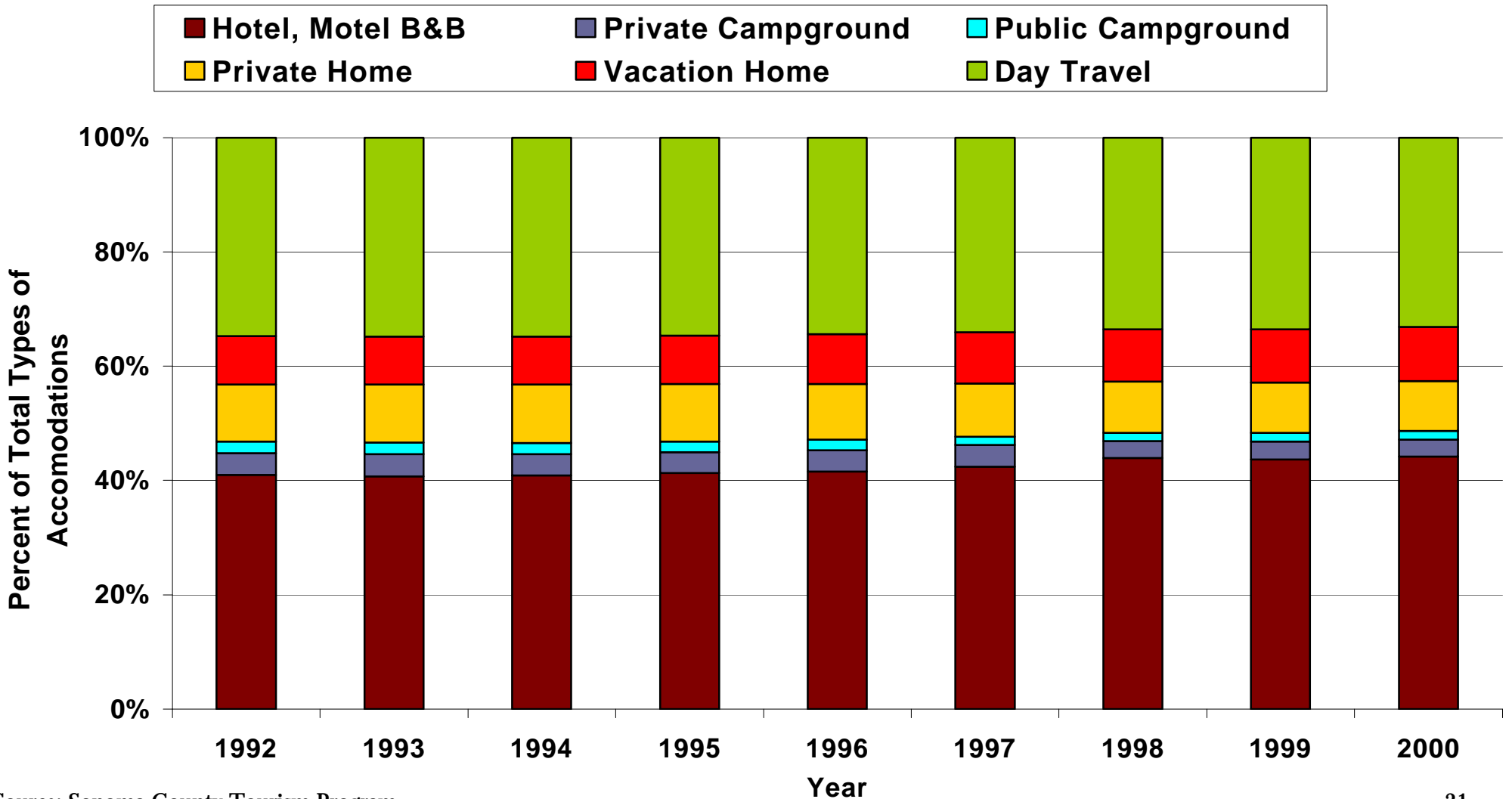
# Tourism

Total Annual Expenditures by County and State, 1992-1999



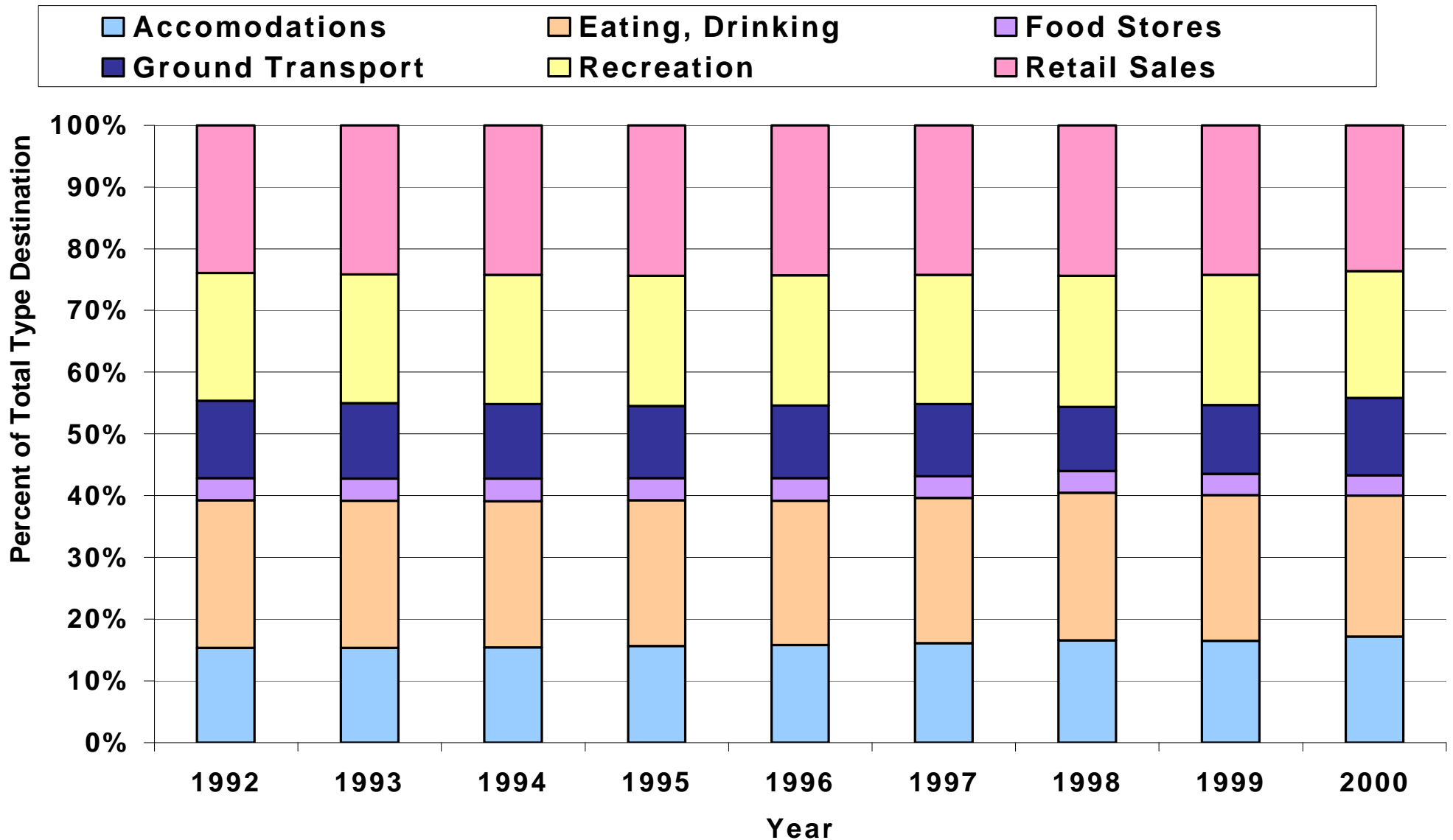
# Tourism

Travel Spending by Type of Traveler Accommodations Destination Spending  
in Sonoma County, 1992-2000



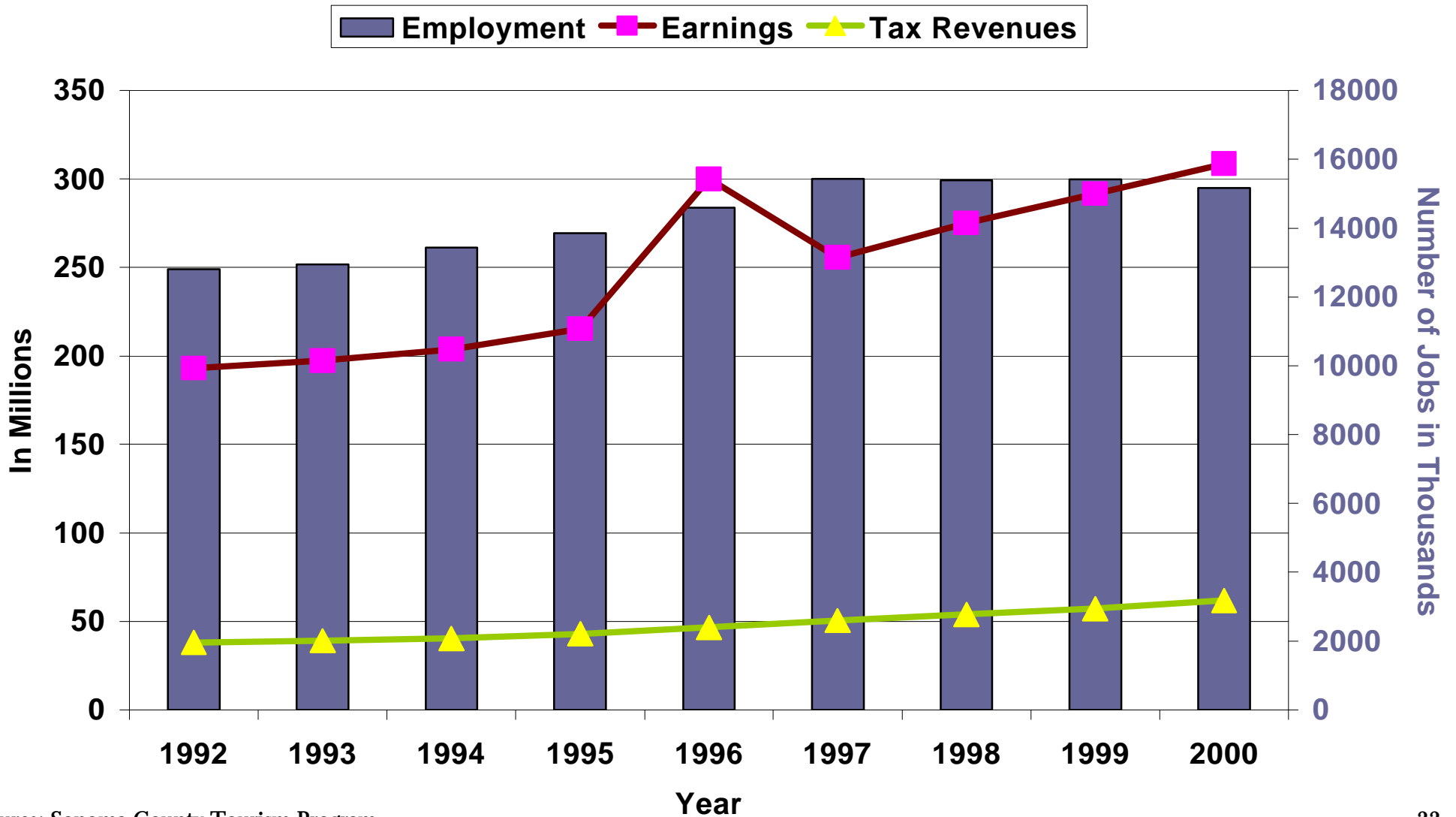
# Tourism

Travel Spending in Sonoma County:  
Type of Business



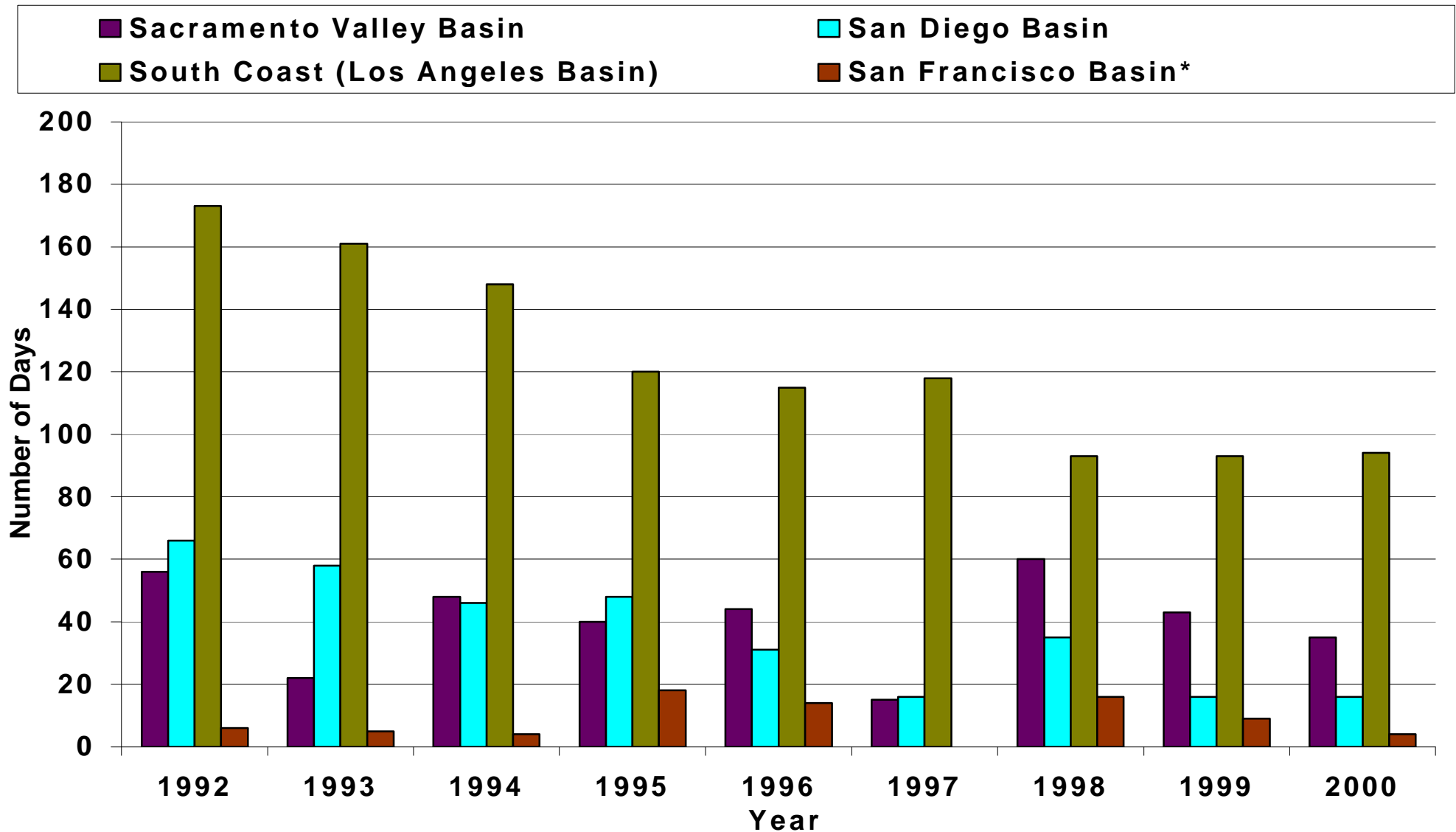
# Tourism

Employment, Earnings and Tax Revenues Generated by Travel Spending in Sonoma County



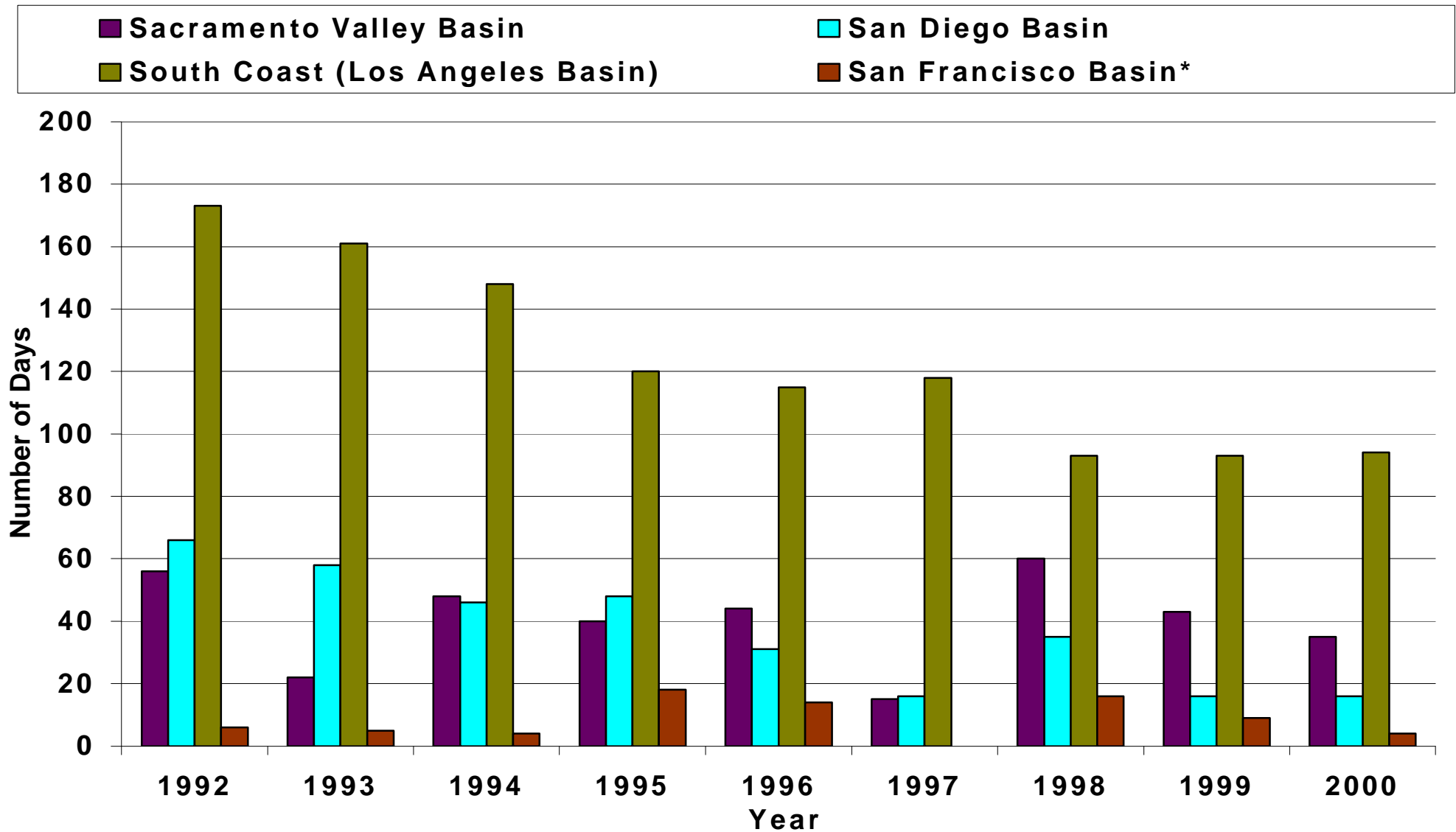
# Environment

## Days Above the National Ozone 8-hour Standard by Basin



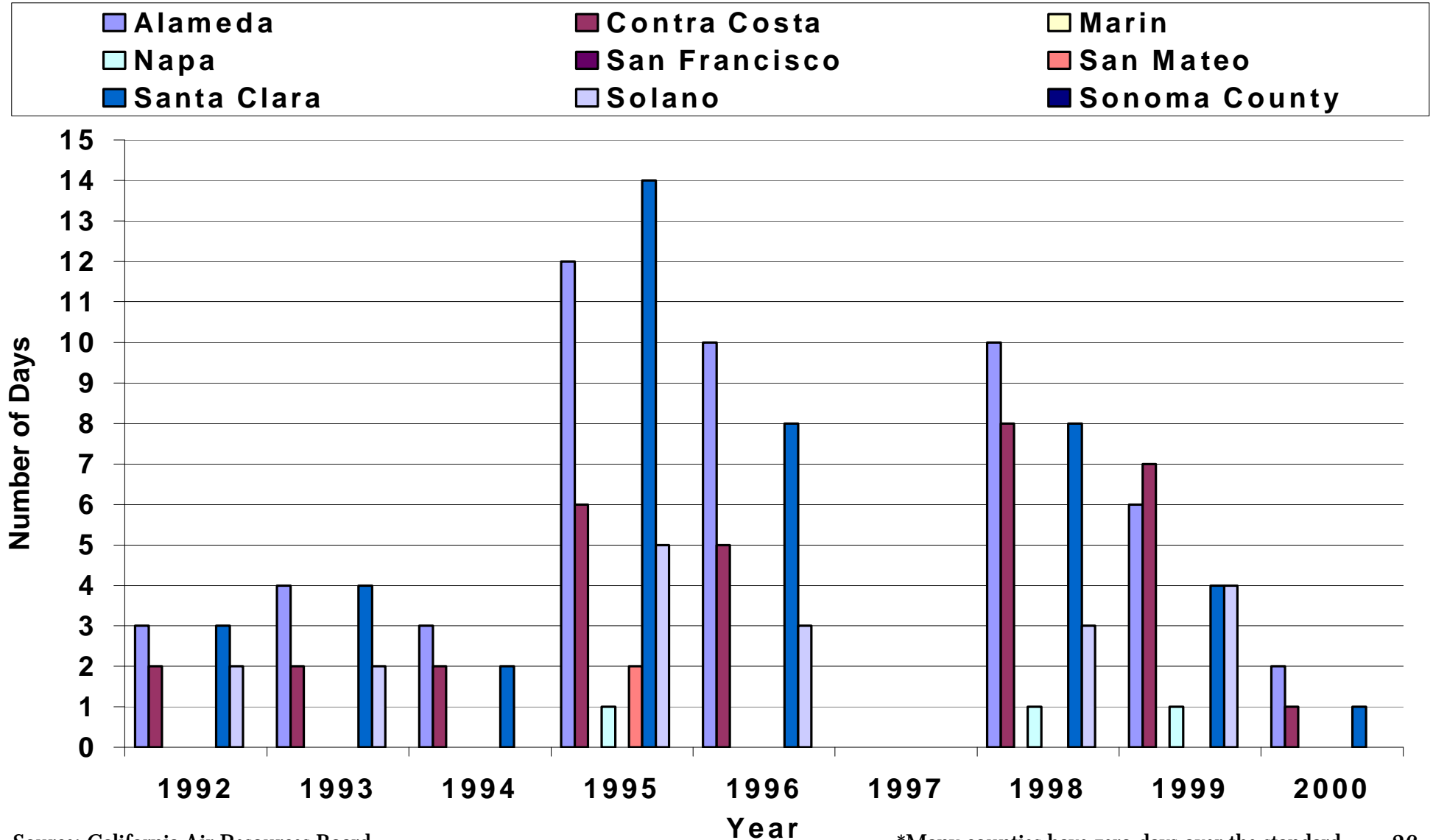
# Environment

## Days Above the National Ozone 8-hour Standard by Basin



# Environment

Comparison of Air Quality in San Francisco Basin  
Days Above National 8-Hour Ozone Standard \*

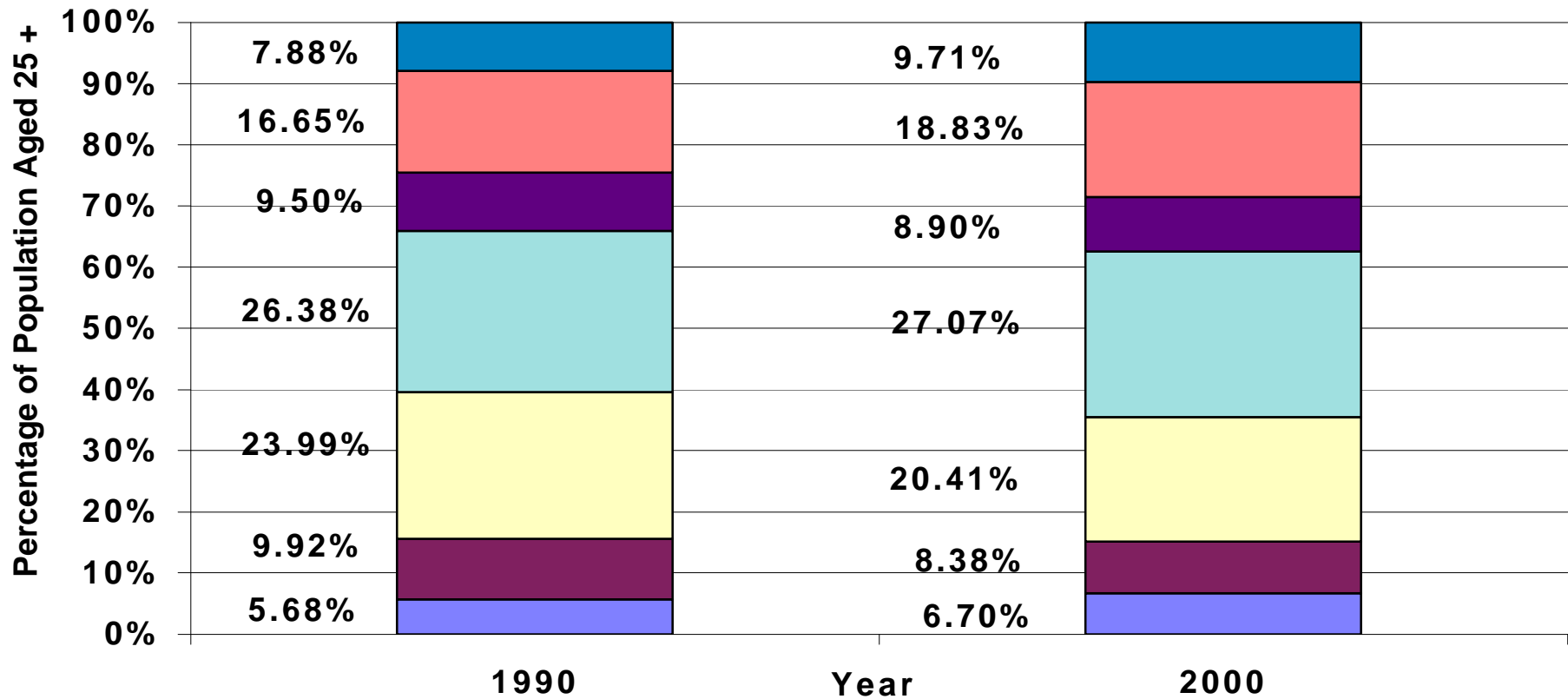


Source: California Air Resources Board

\*Many counties have zero days over the standard.

# Education

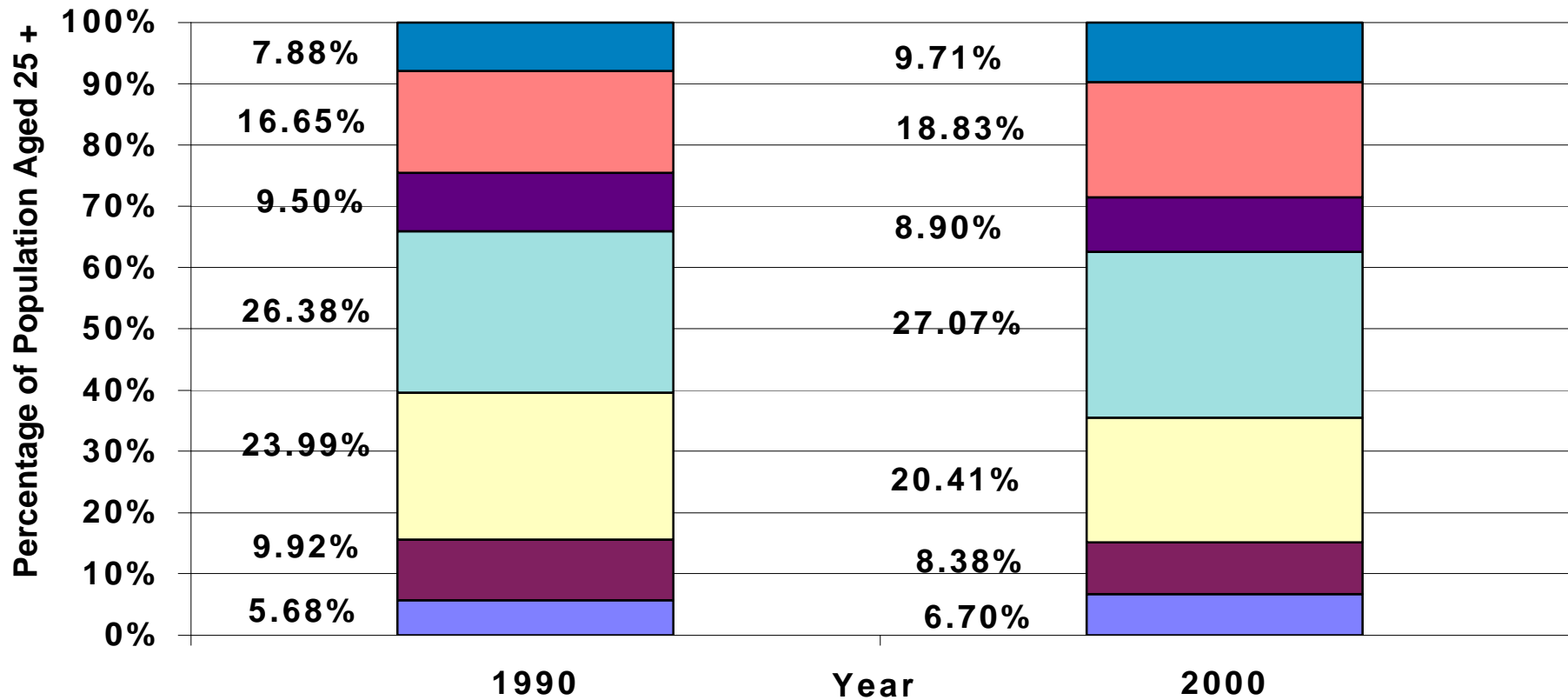
**Educational Attainment of People in Sonoma County  
25 years and Older**



- Less than 9th grade
- High School Graduate (Diploma)
- Associate degree
- Some high school, no diploma
- Some college, no degree
- Bachelor's degree
- Graduate or professional degree

# Education

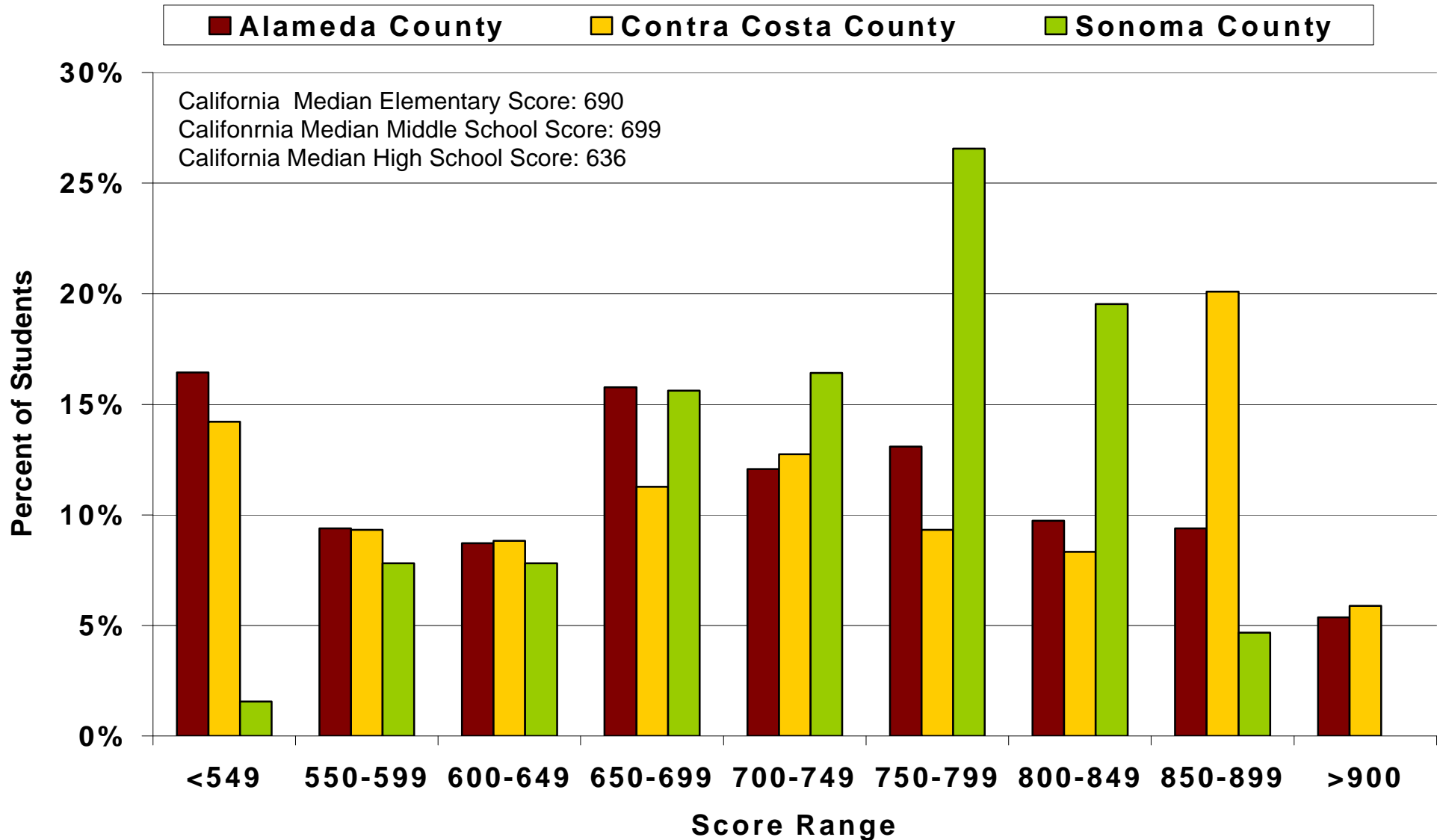
**Educational Attainment of People in Sonoma County  
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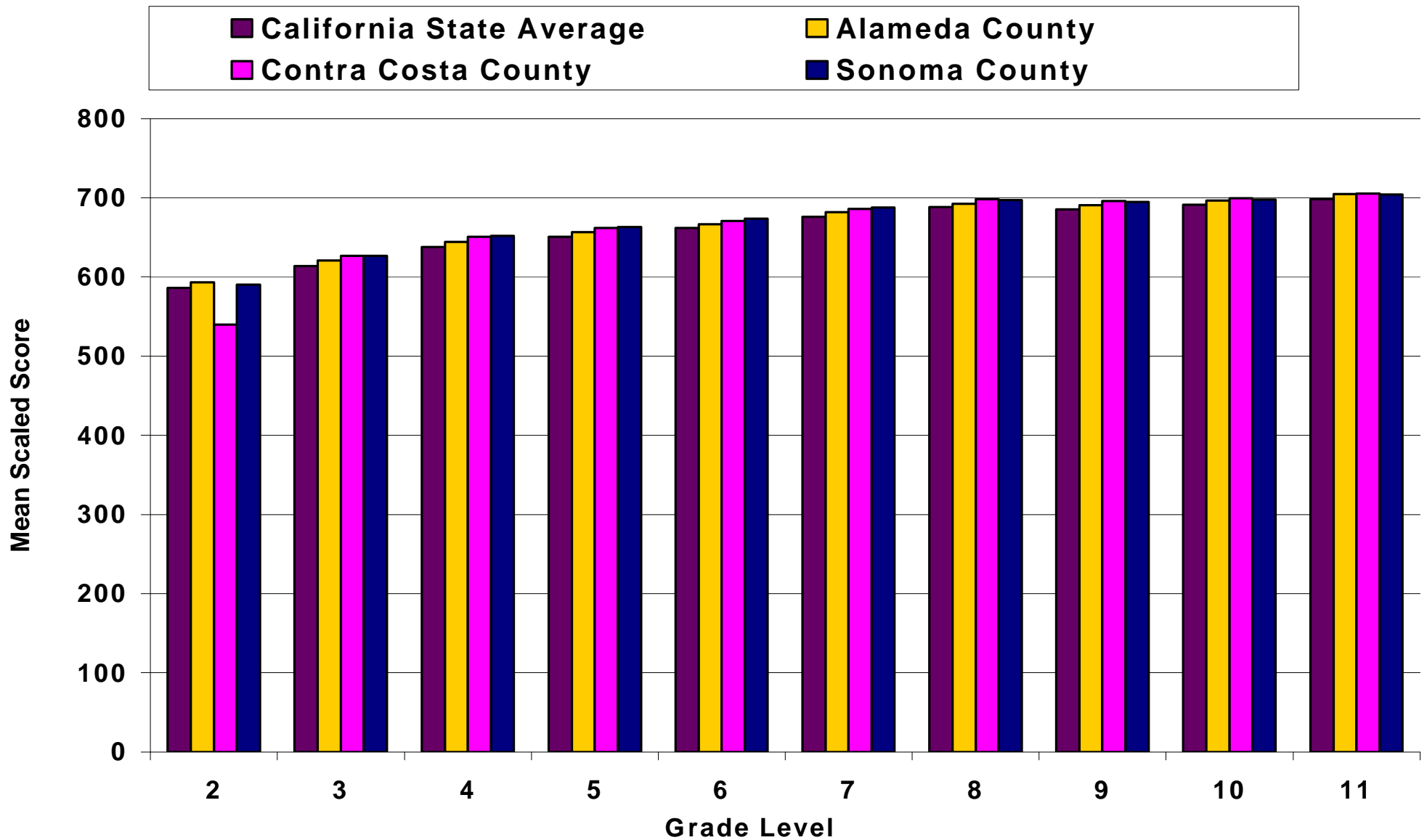
# Education

Academic Performance Index Scores  
2001-2002 Base Index



# Education

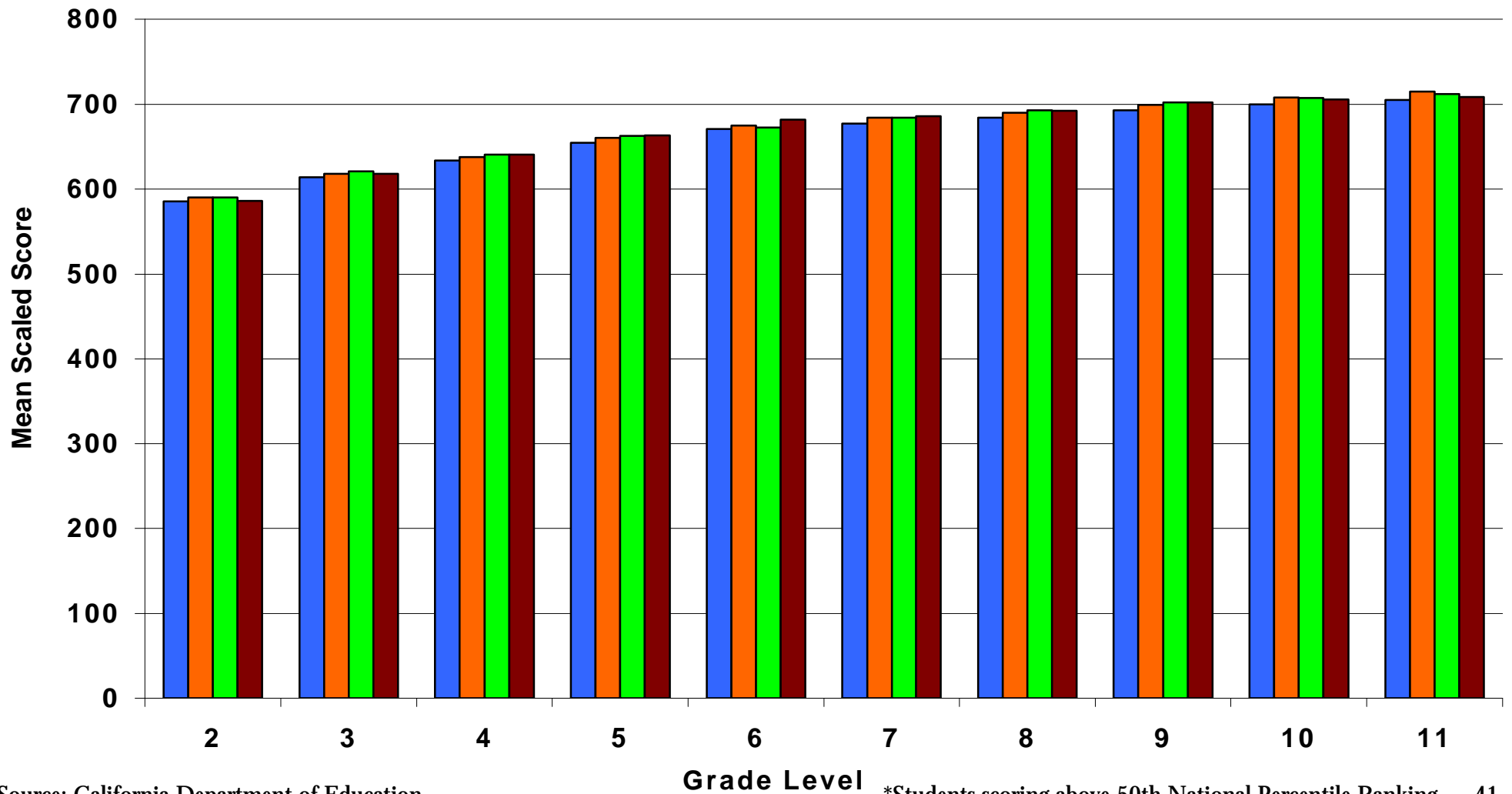
STAR Reading Scores 2002\*



# Education

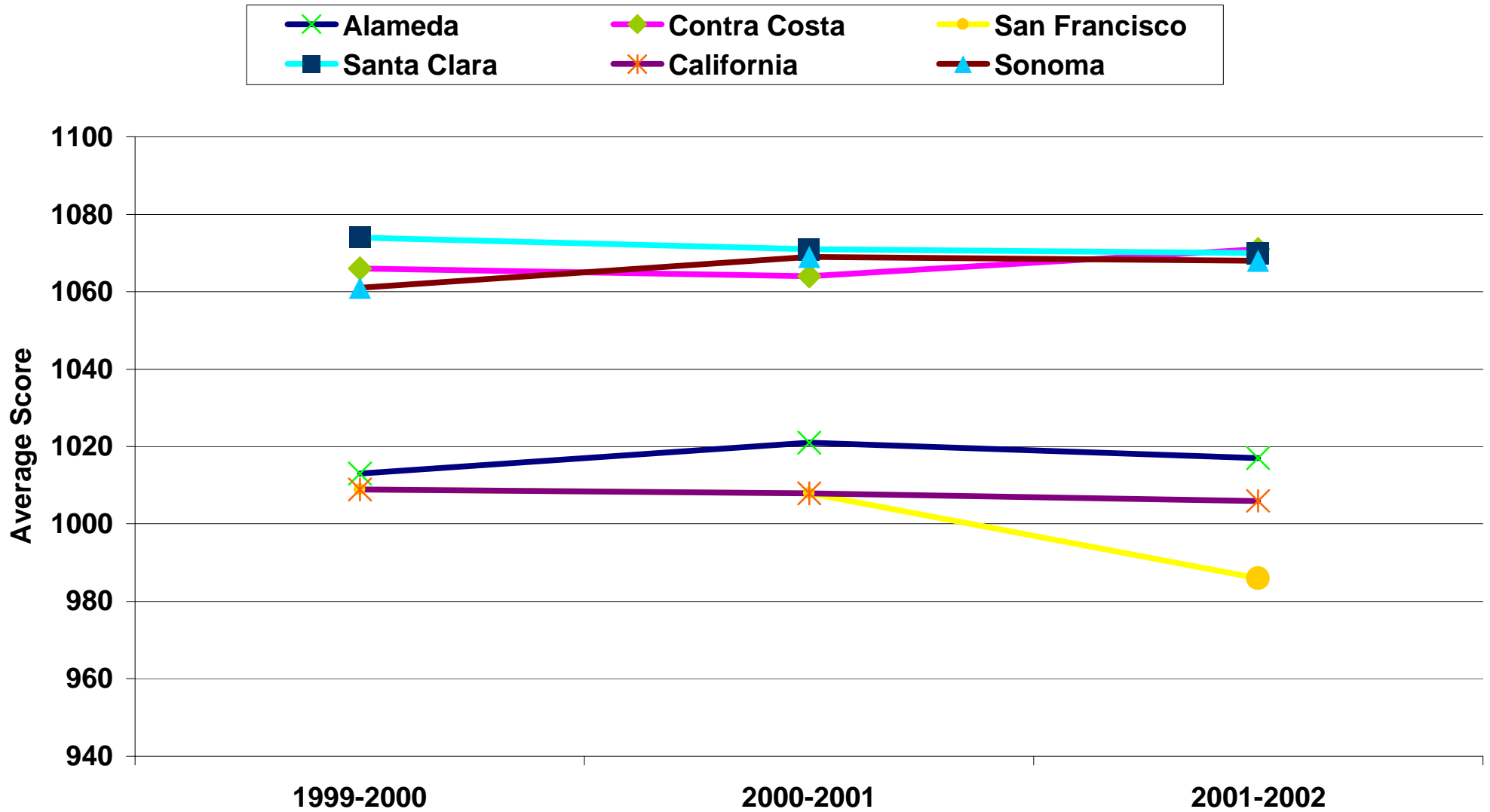
STAR Math Scores 2002\*

California State Average Alameda County  
Contra Costa Sonoma County



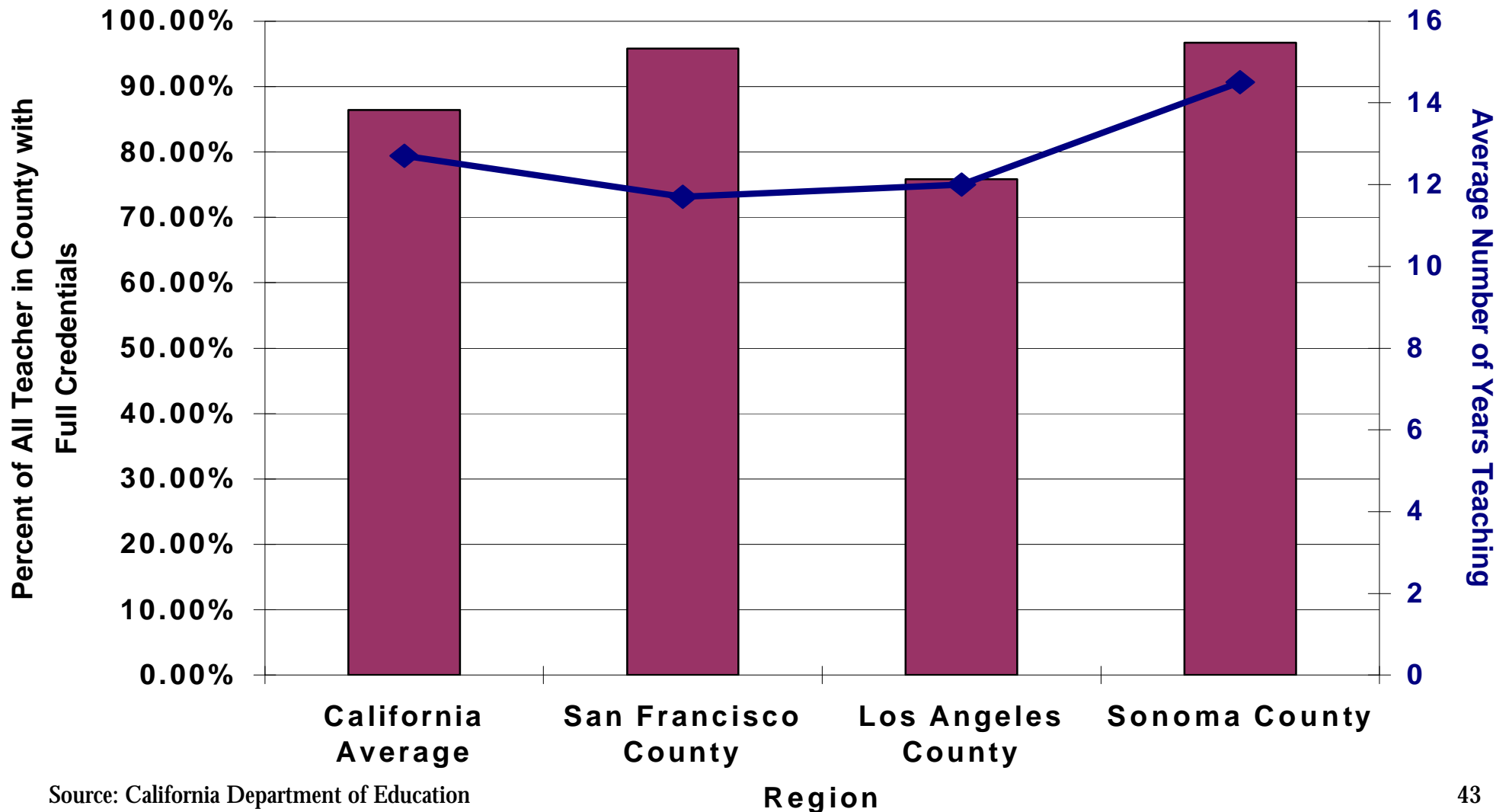
# Education

SAT Average Composite Scores\*



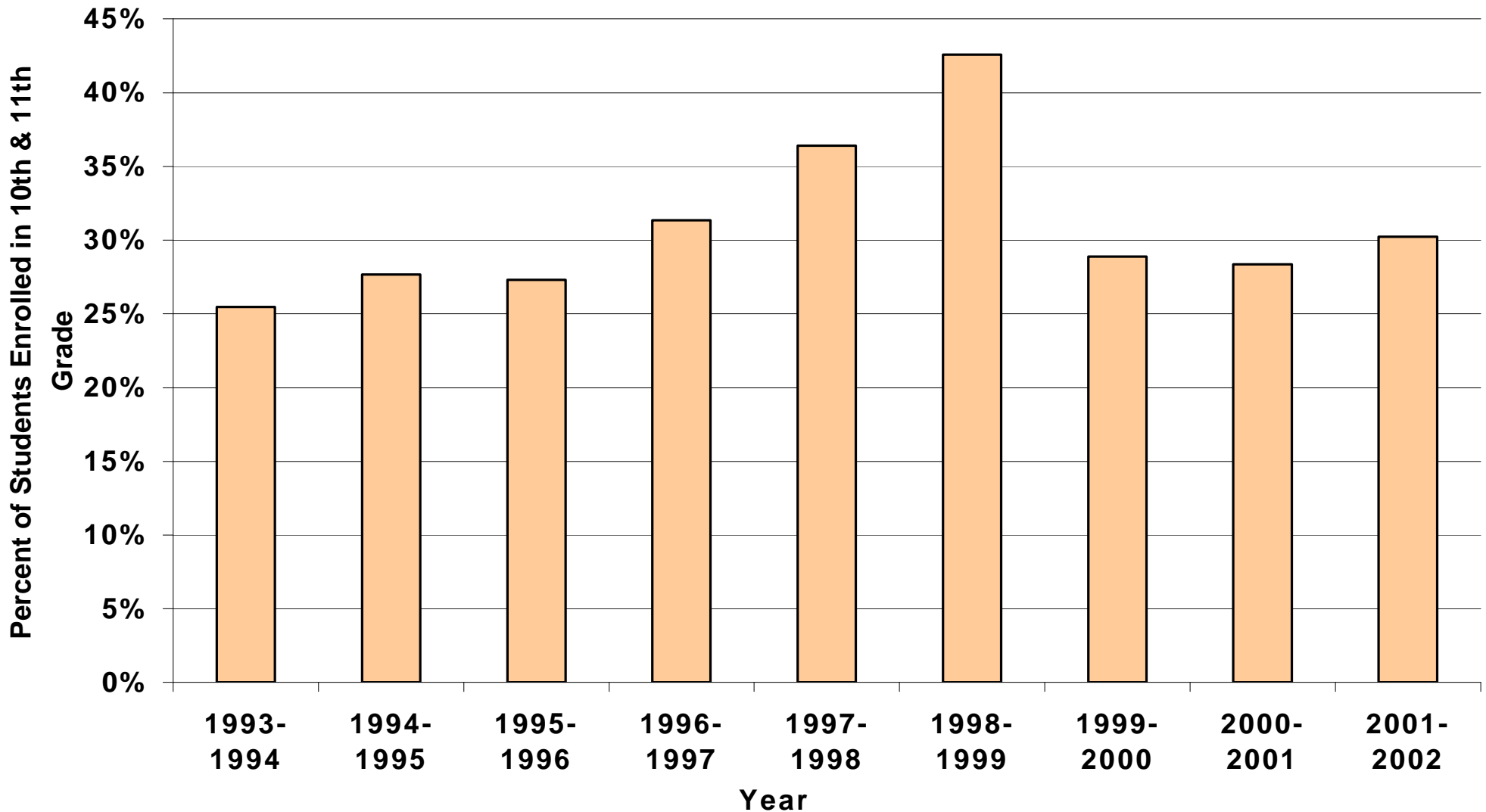
# Education

Experience & Credentials of Teachers  
2001-2002



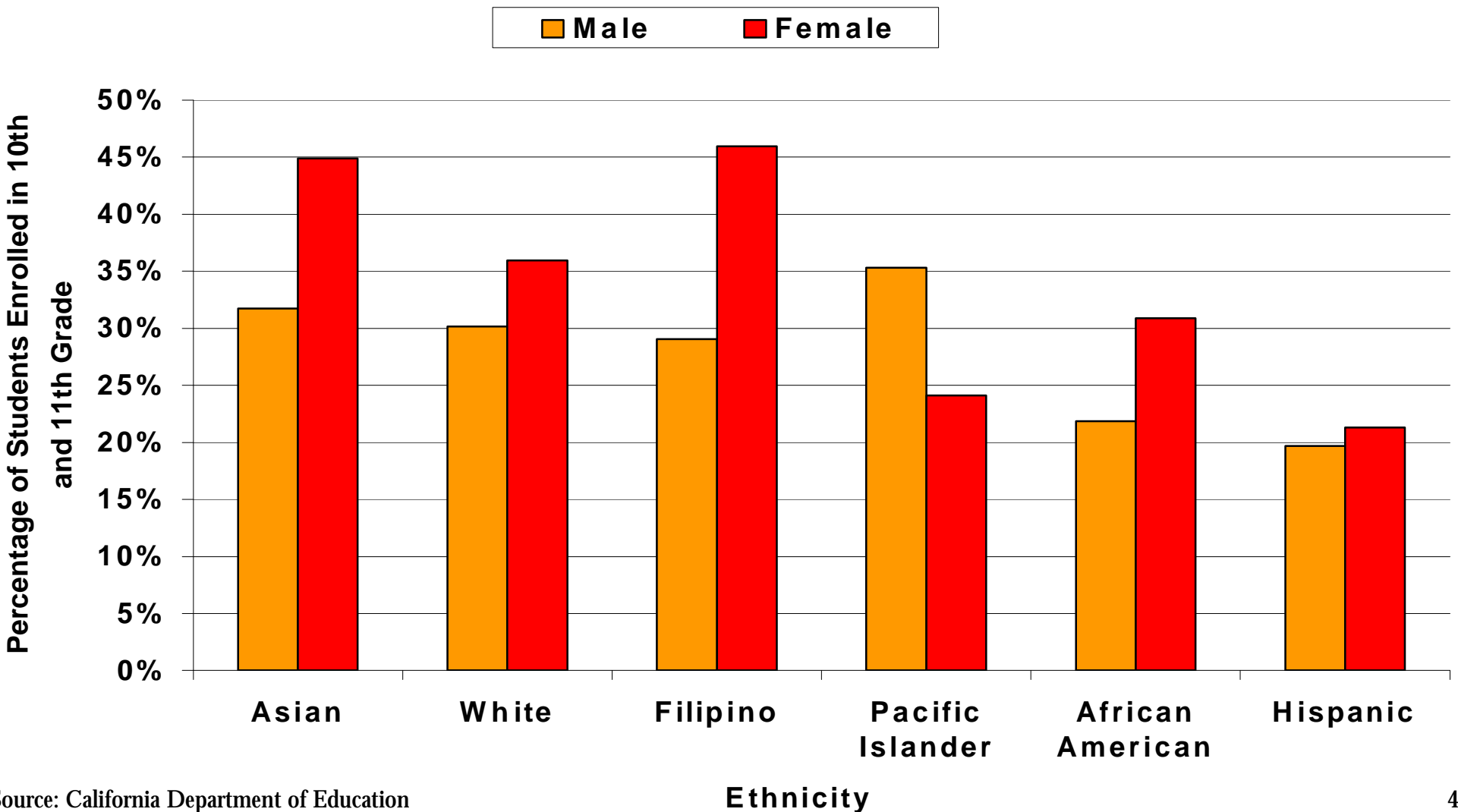
# Education

Percentage of 11th and 12th Grade Students in Sonoma County Enrolled in Intermediate Algebra



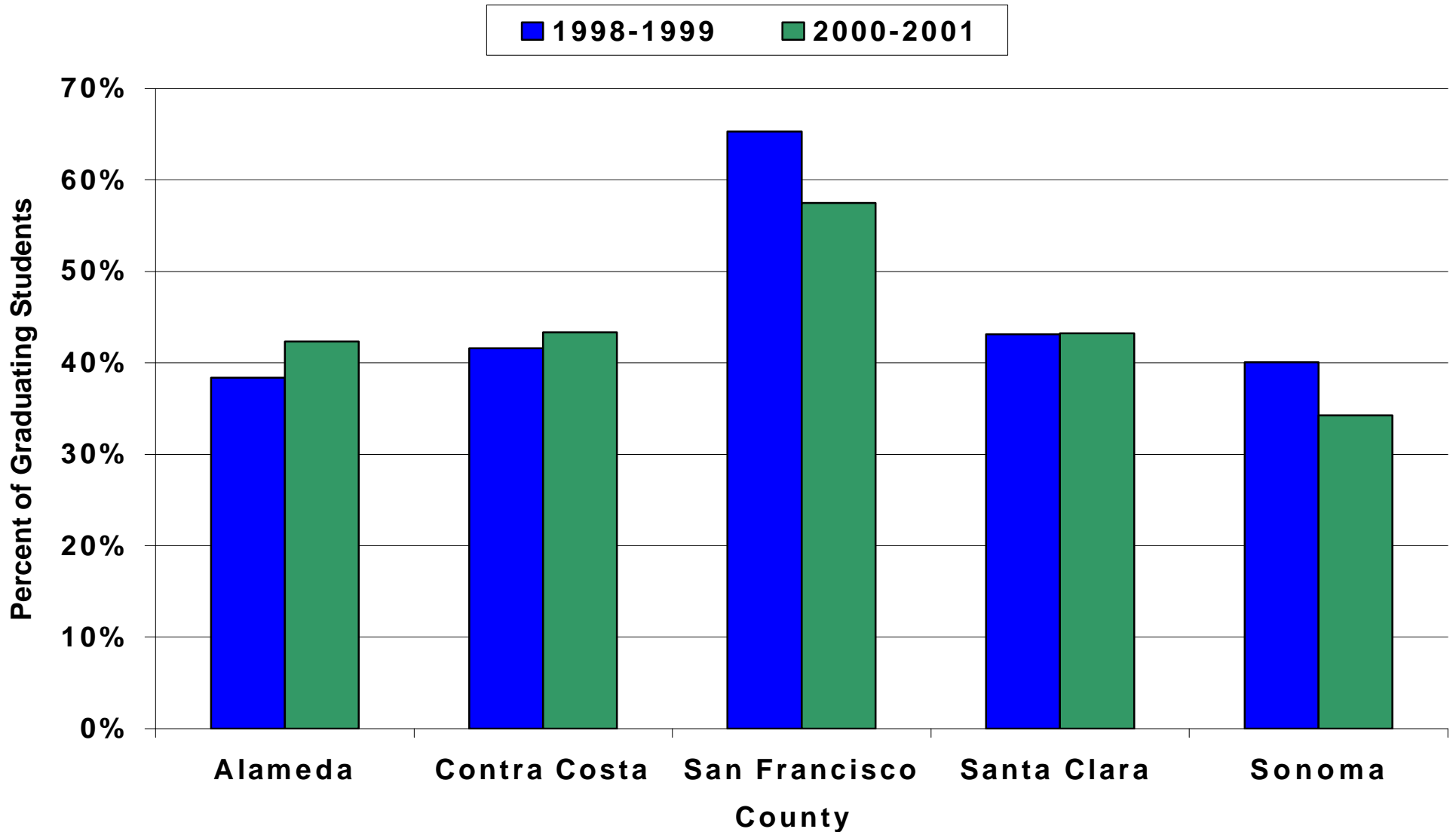
# Education

Percentage of 10th and 11th Graders Enrolled in Intermediate Algebra  
in Sonoma County  
By Ethnicity and Gender



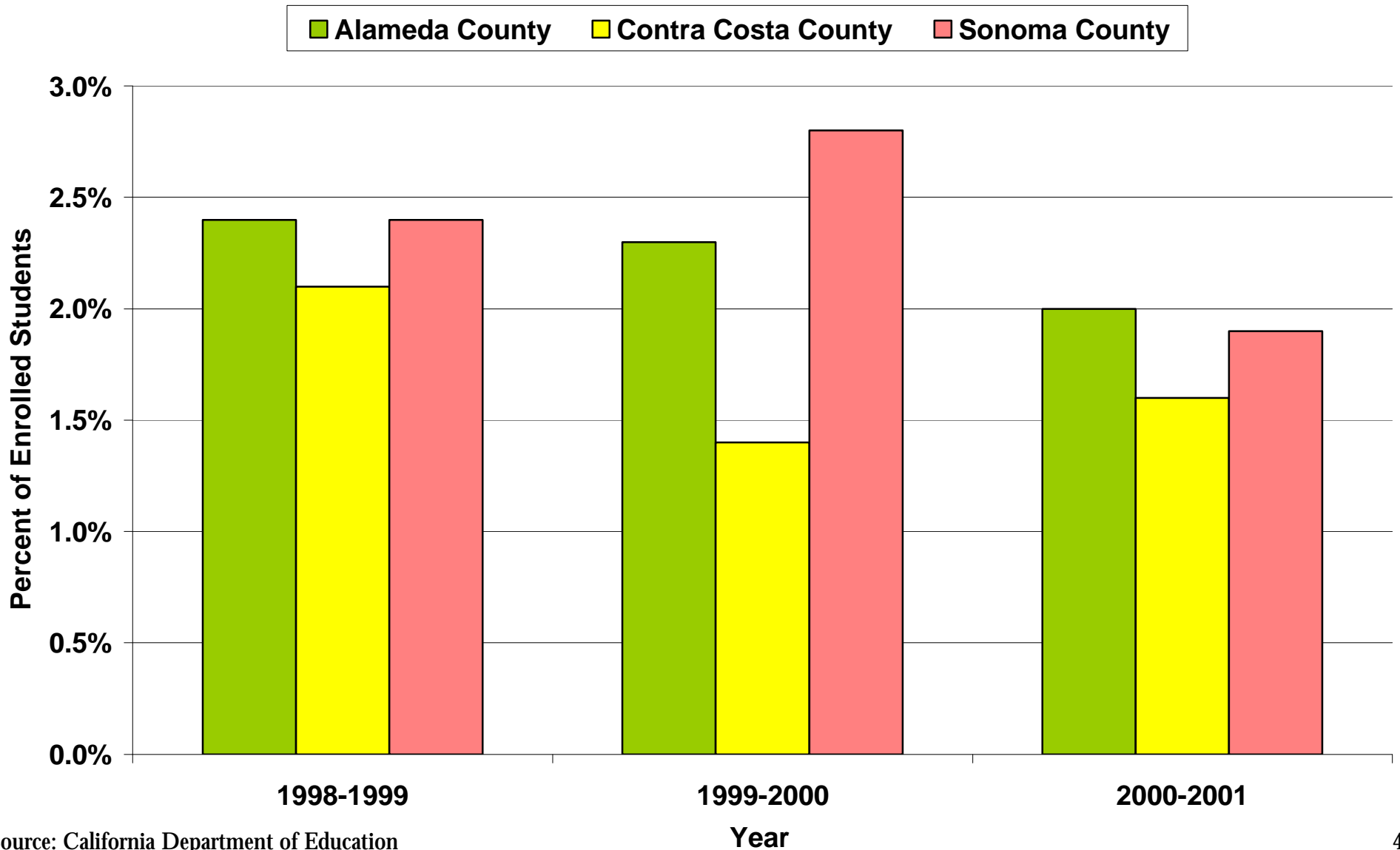
# Education

Percentage of High School Graduates Eligible for UC and CSU by County

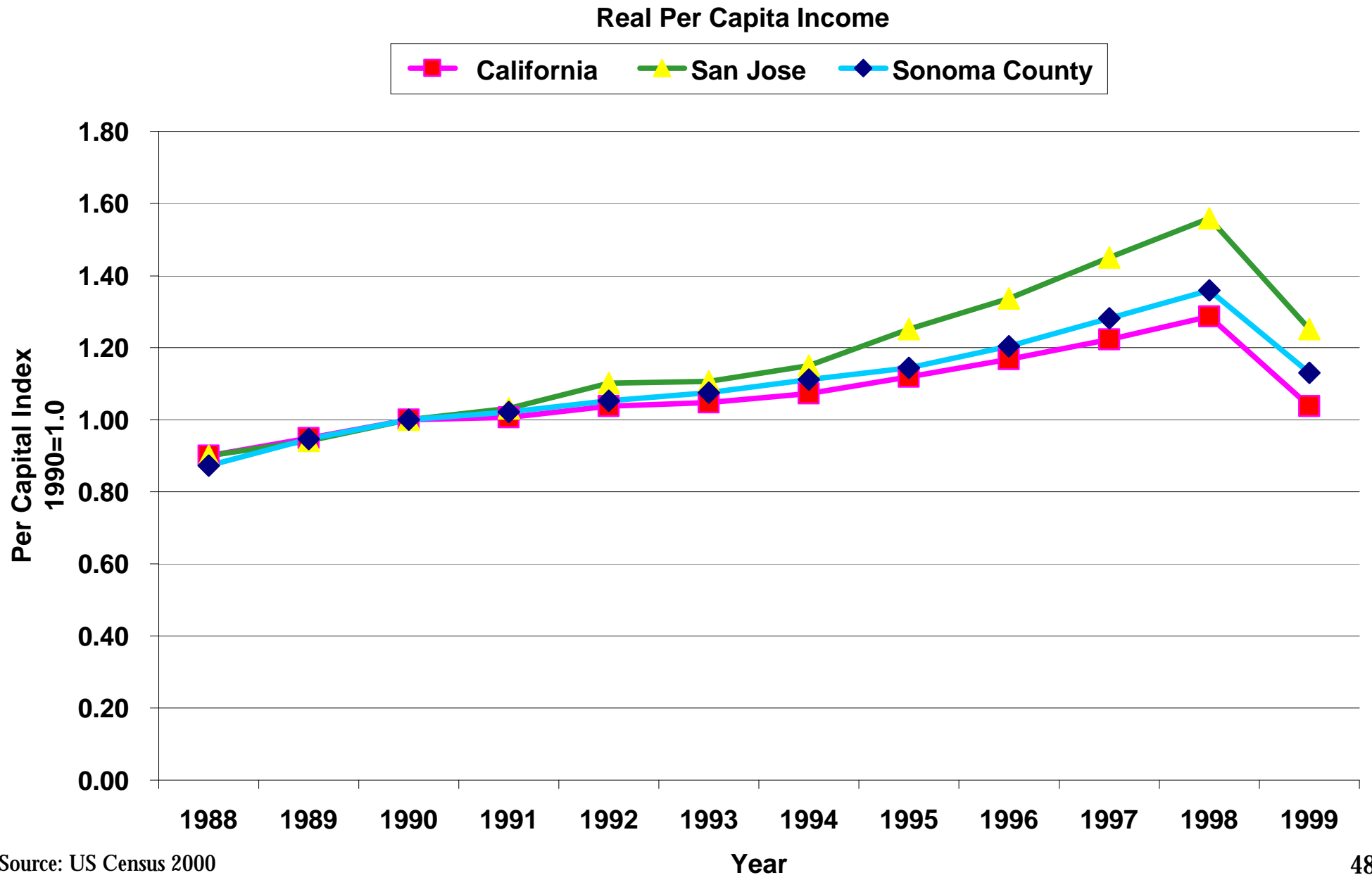


# Education

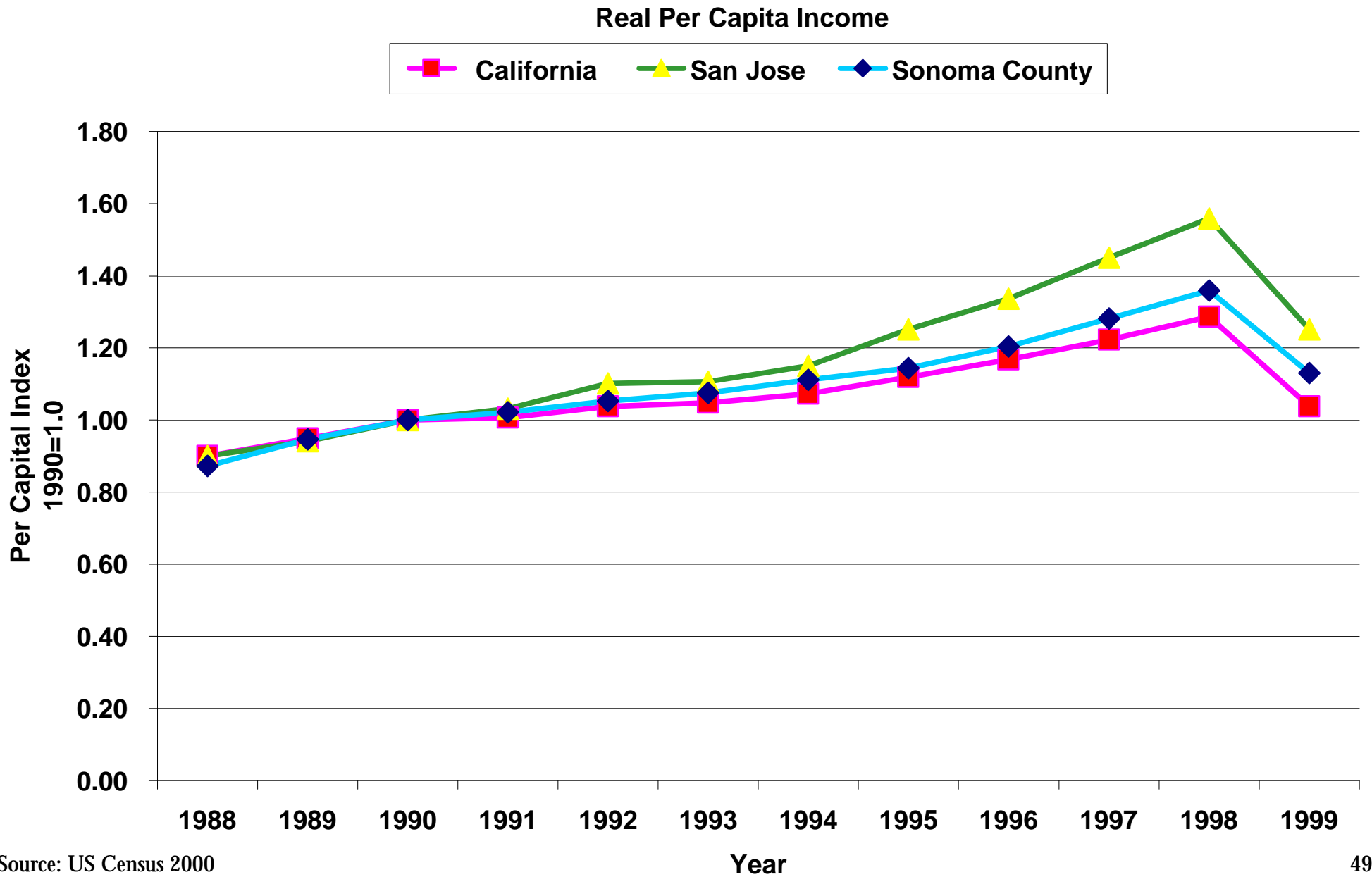
One-Year High School Dropout Rate by County



# Social Equity

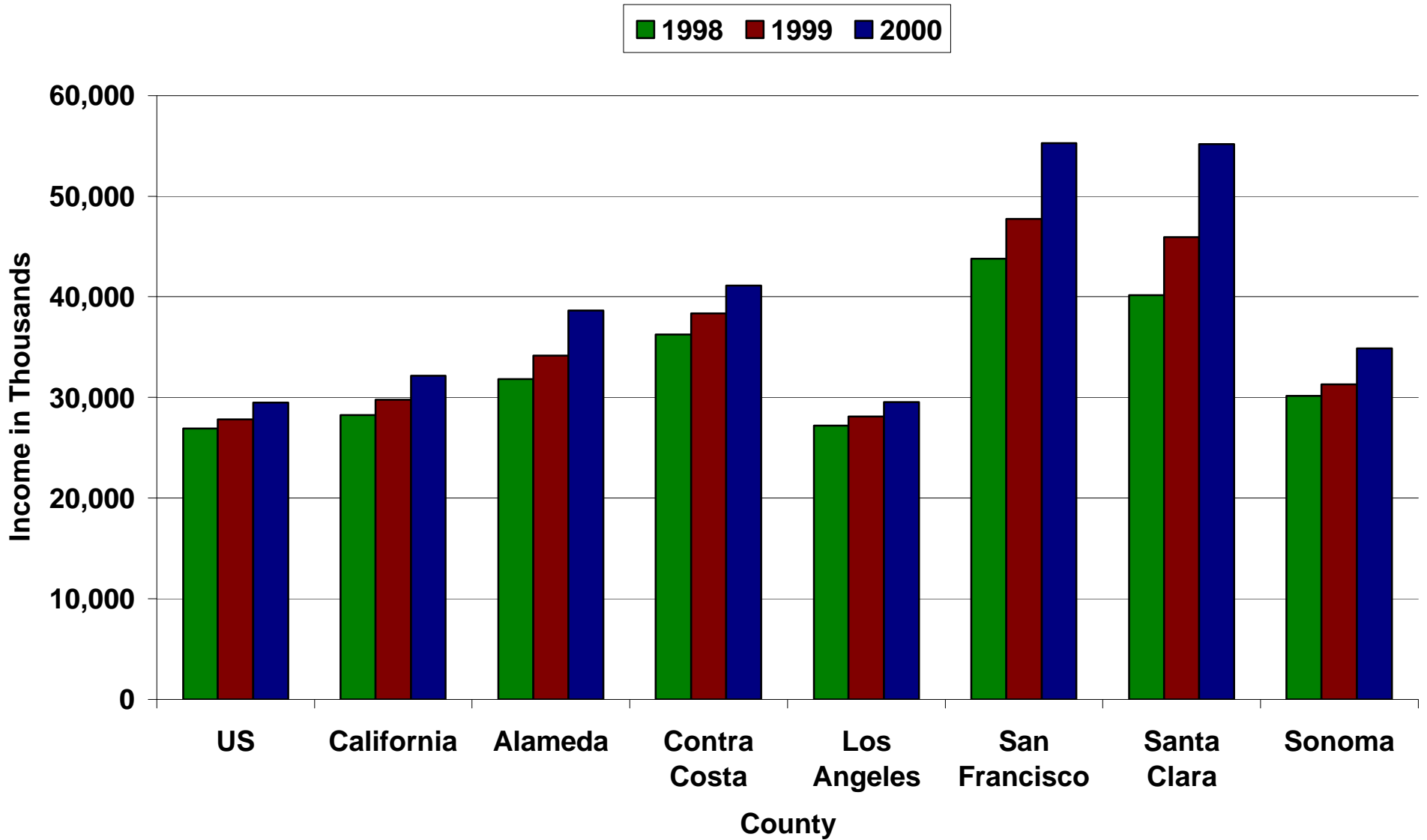


# Social Equity



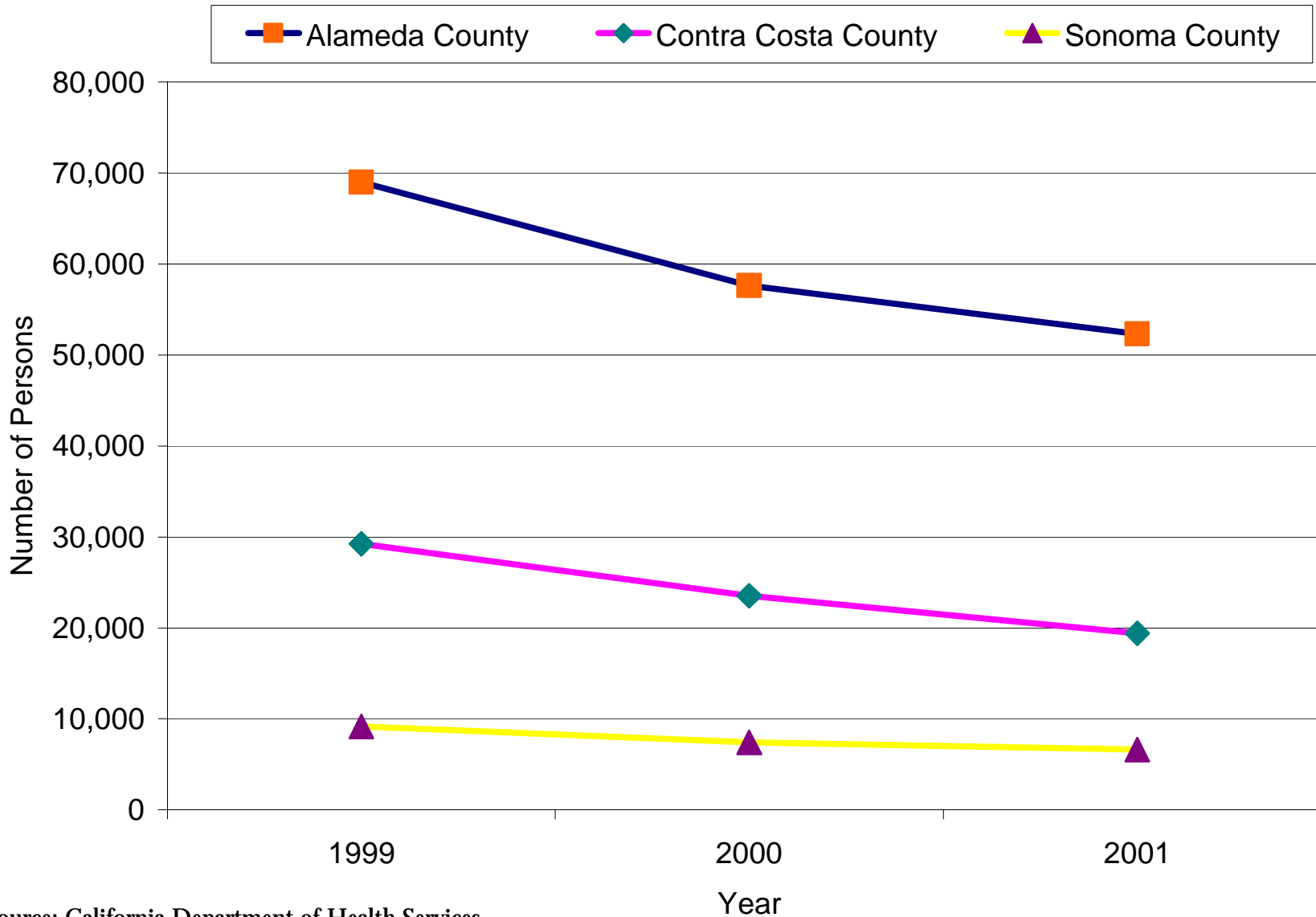
# Social Equity

Per Capita Personal Income



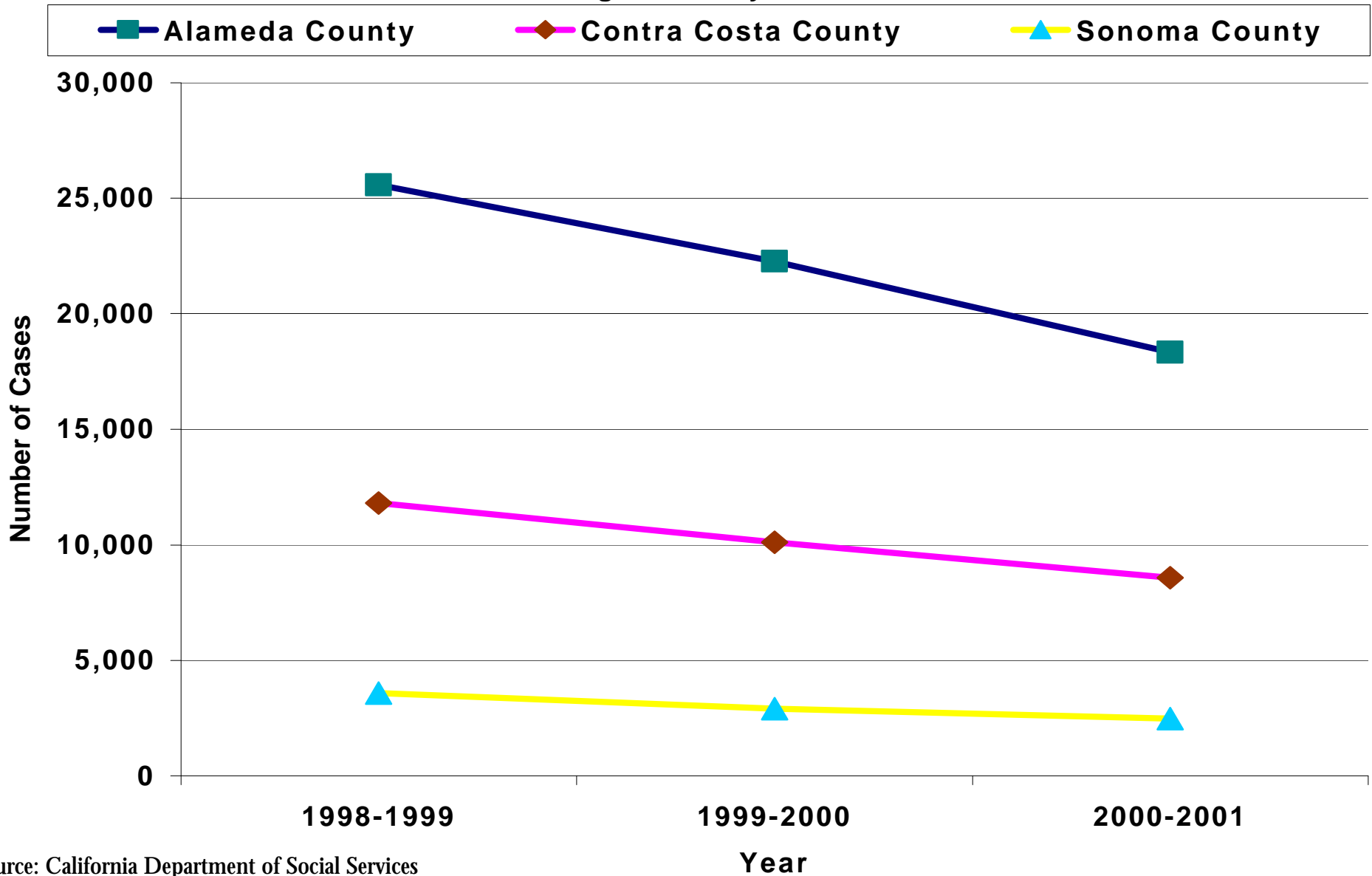
# Social Equity

Food Stamps- Average Number of Persons Receiving Benefits per Month



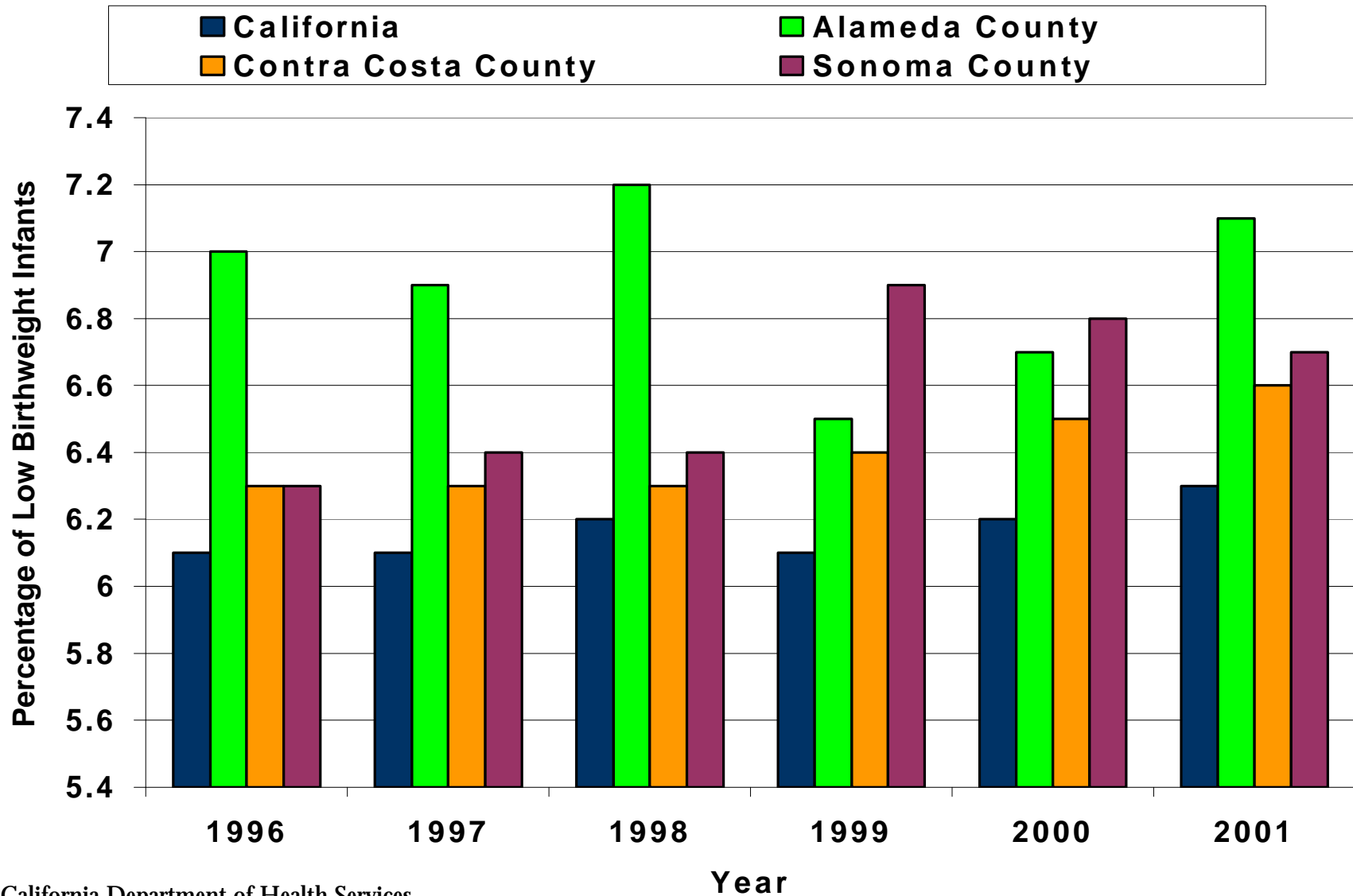
# Social Equity

Cal WORKs Program  
Average Monthly Caseload



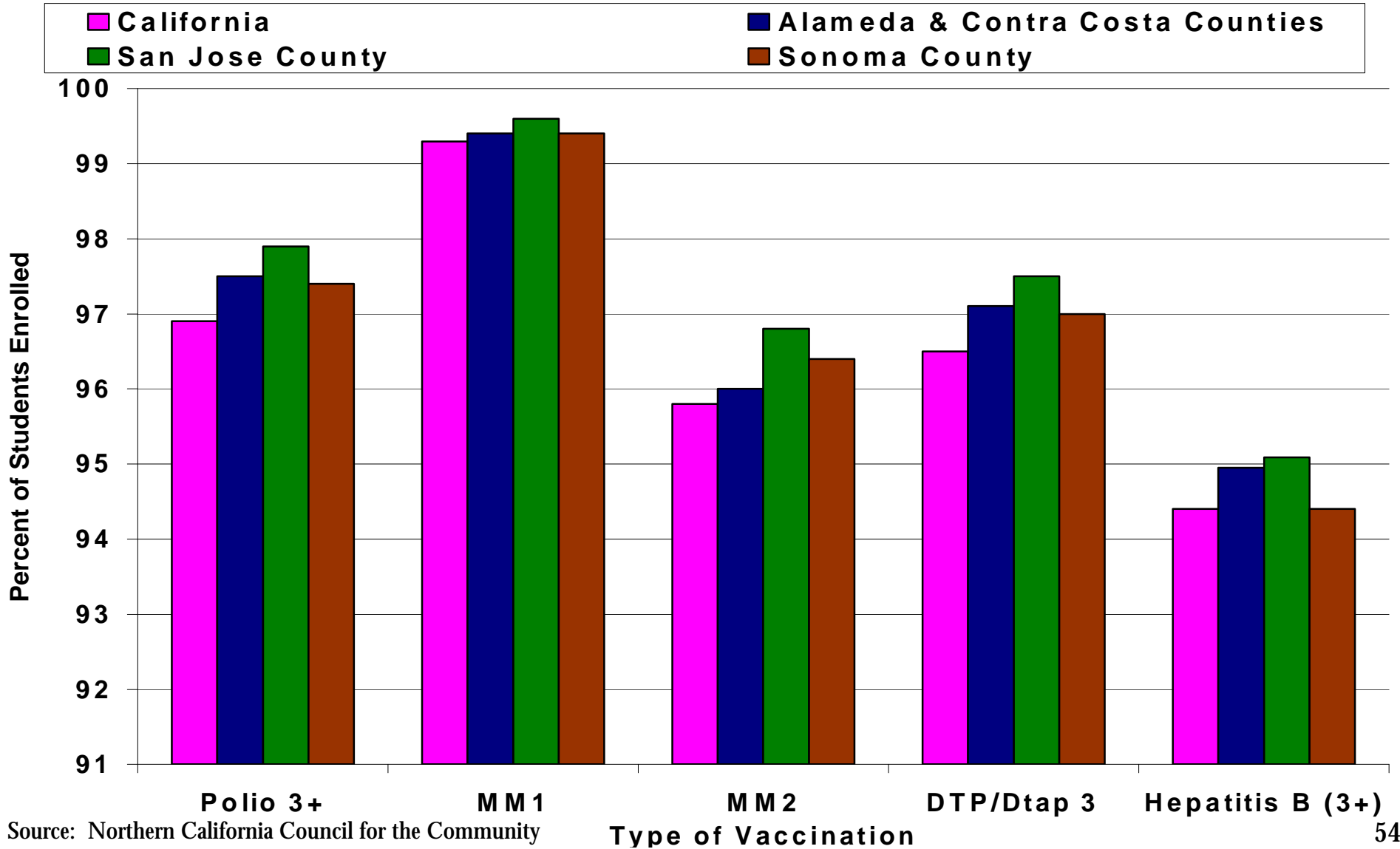
# Social Equity

Low Birthweight Infants  
Percentage of Total Births



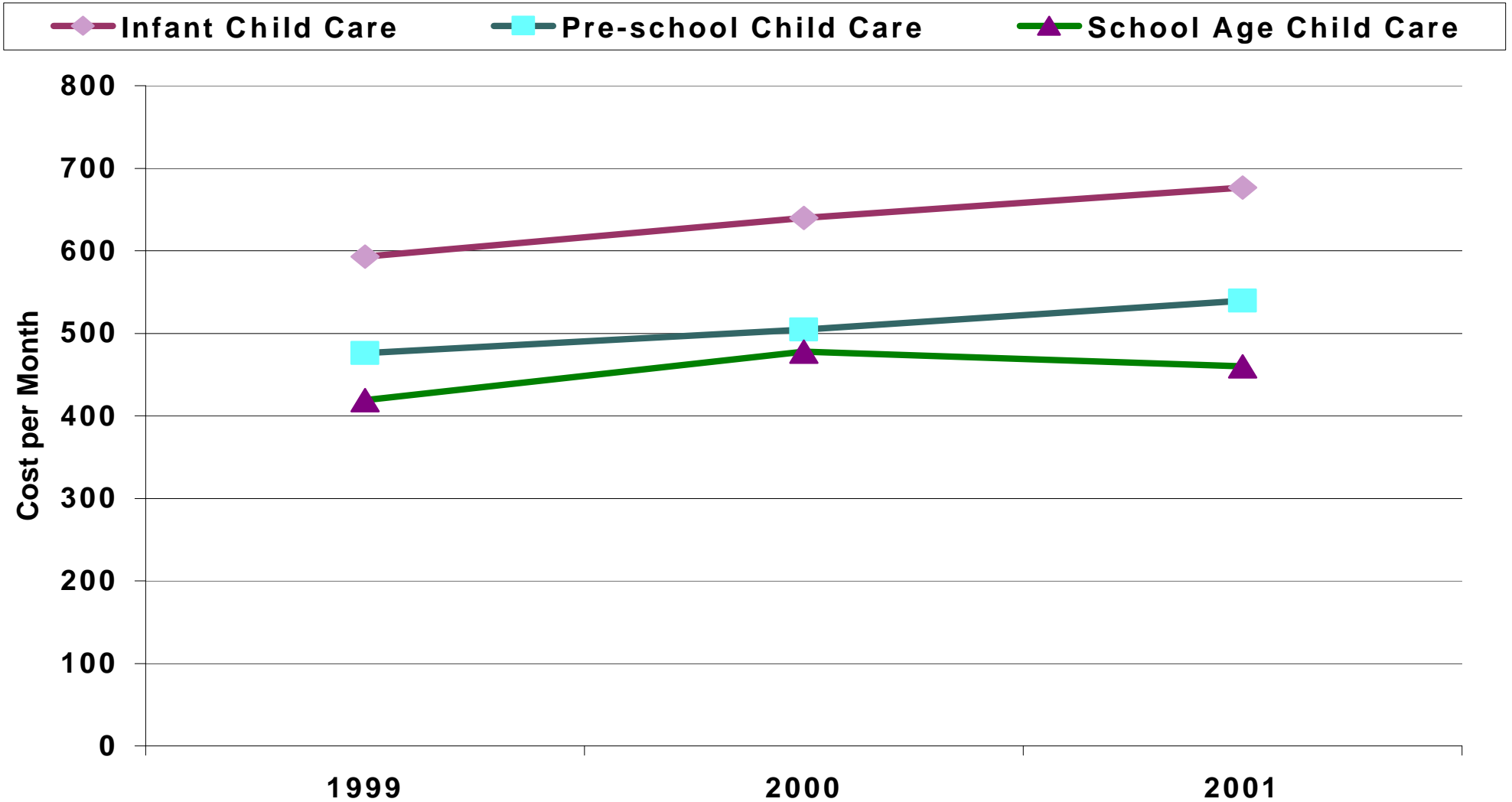
# Social Equity

Immunization Rates for Students  
1998



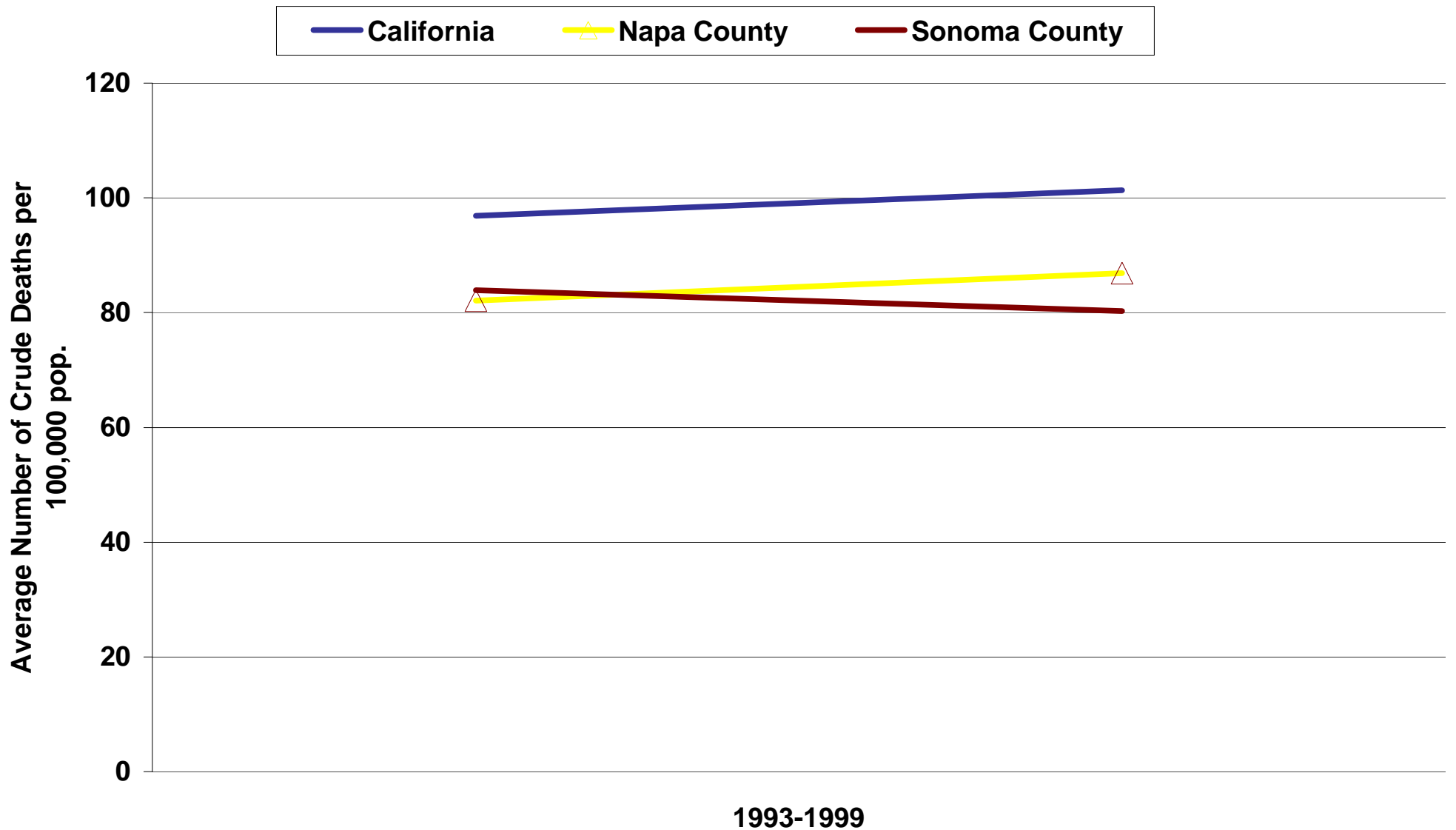
# Social Equity

Cost of Childcare in Sonoma County



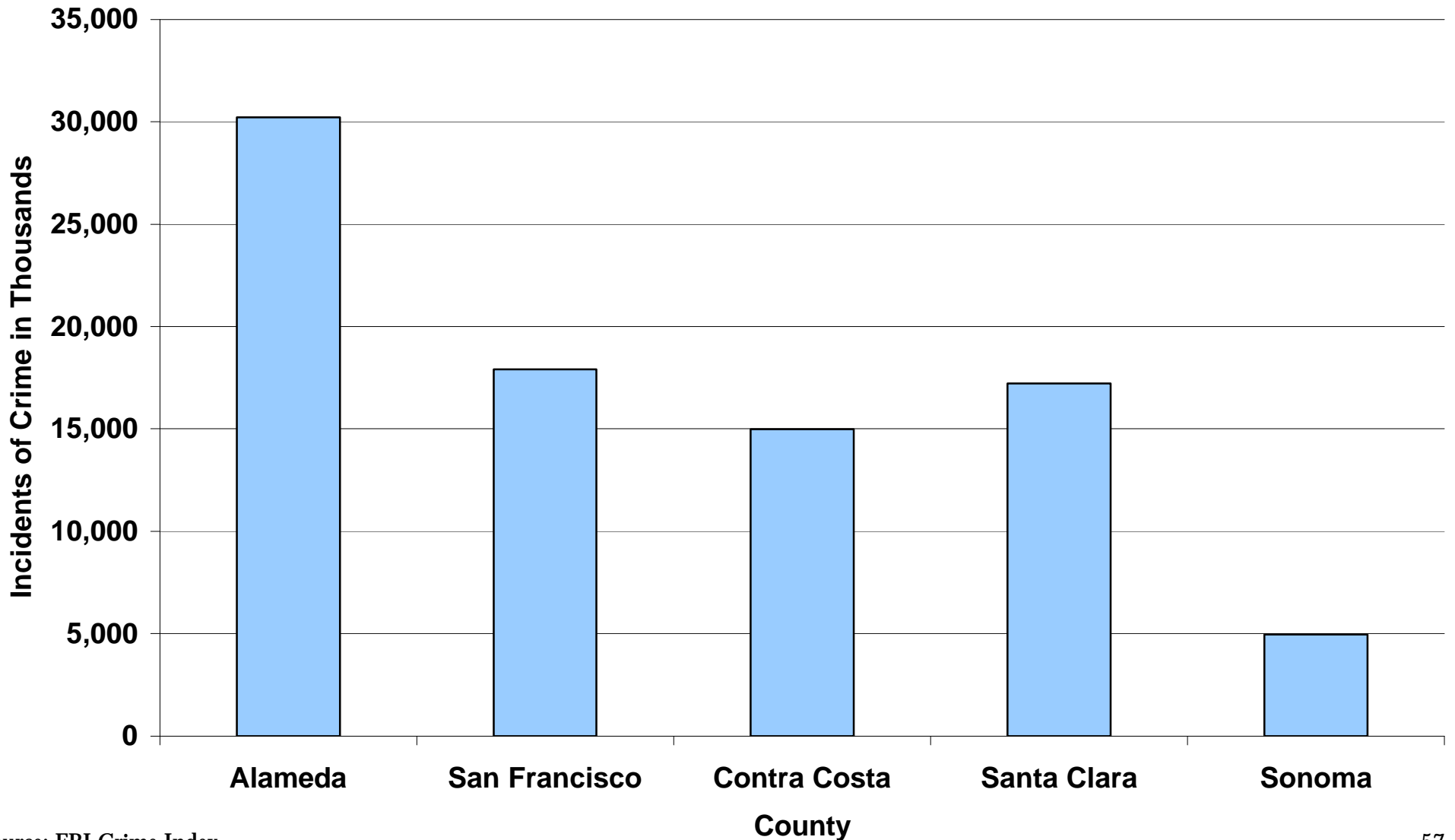
# Social Equity

Deaths due to Coronary Heart Disease



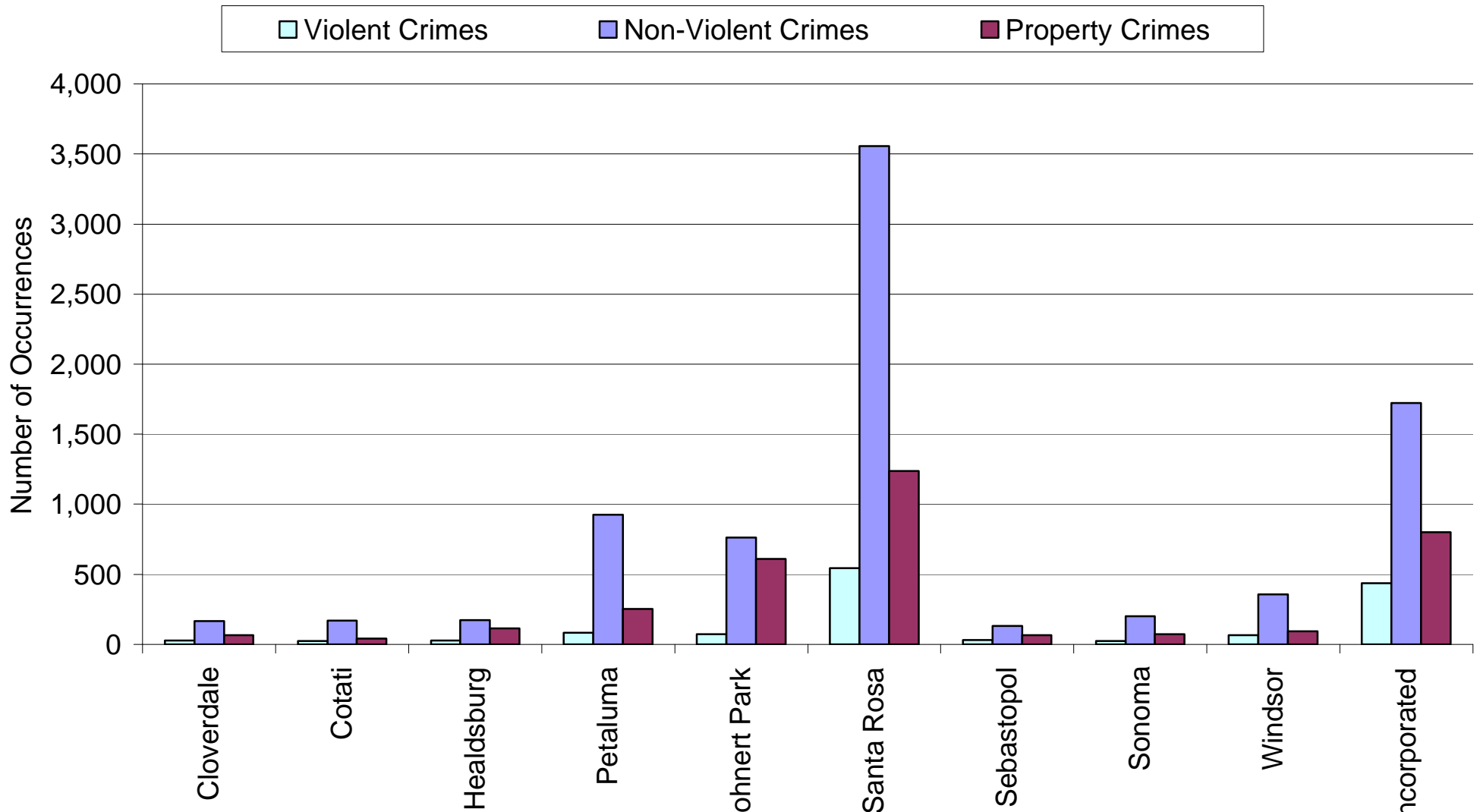
# Social Equity

Crime Rate in Bay Area for Year 2000



# Social Equity

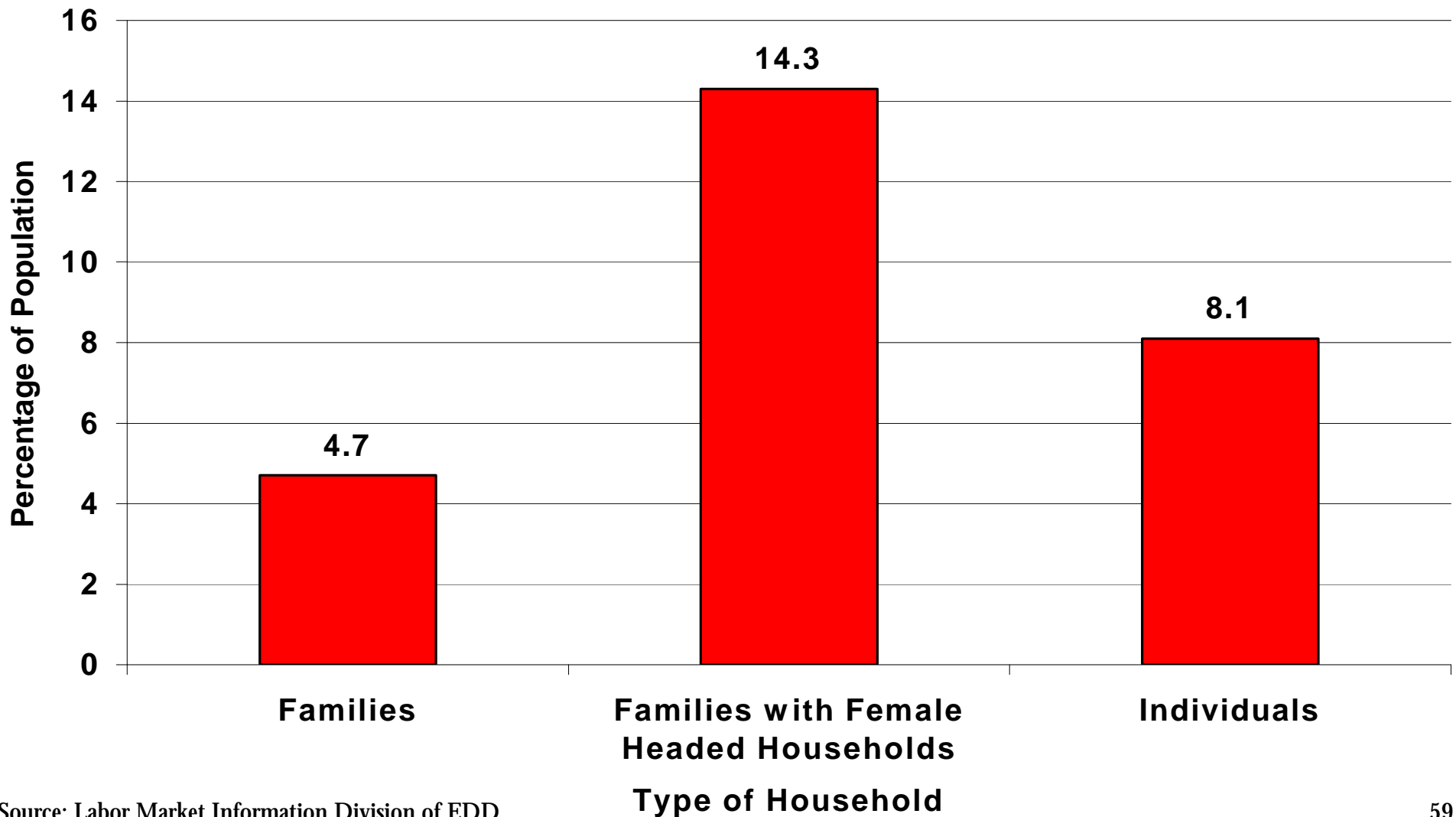
Different Crime Rates by City  
Sonoma County, 2000



Source: FBI Crime Index

# Social Equity

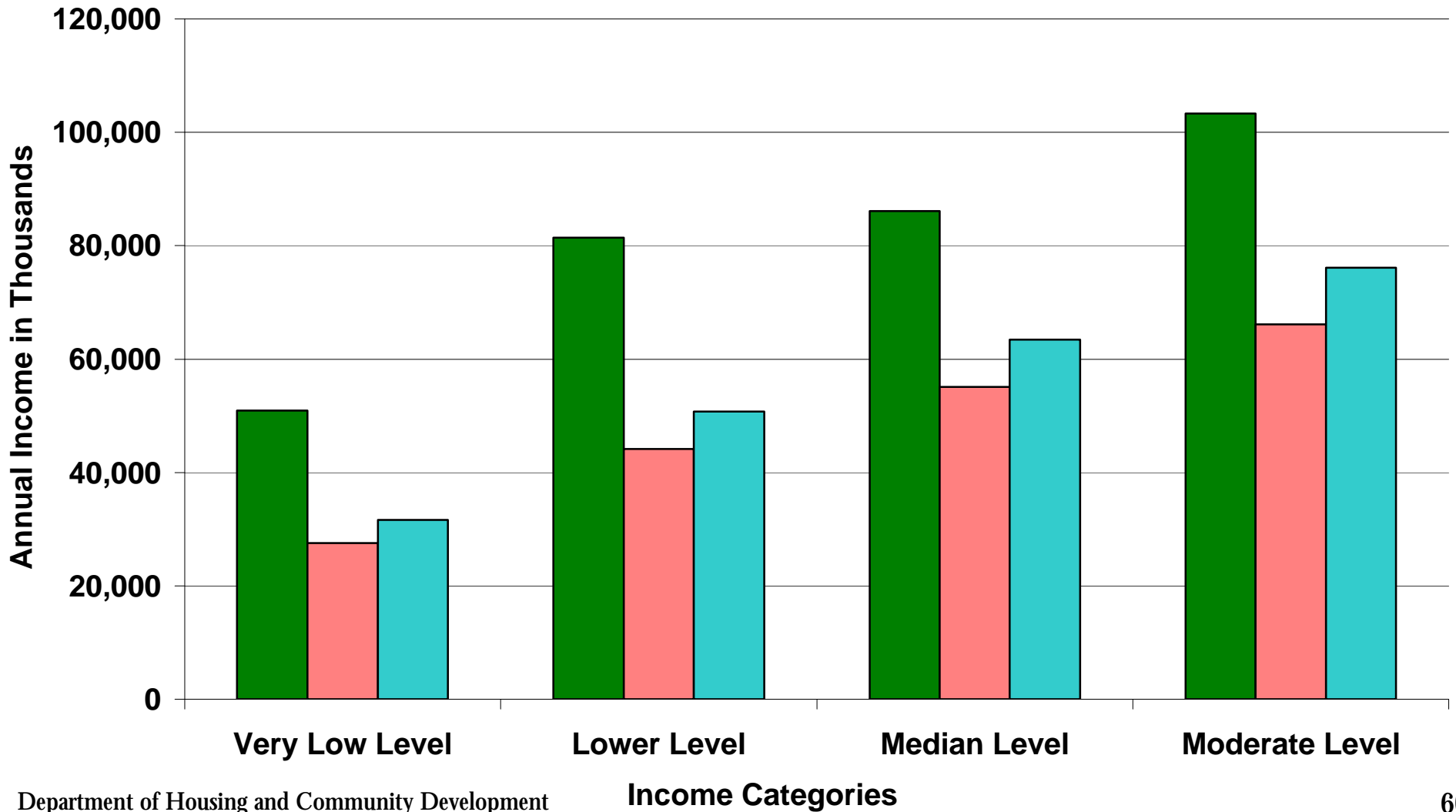
Percent of Population Living Below Poverty Level  
Sonoma County, 2000



# Social Equity

Income Limit Comparisons for Family of Four  
January 2002

■ San Francisco ■ Los Angeles ■ Sonoma



# Methodology

The Indicators are a partial and/or composite representation of the raw data, and although the Indicators do not provide an in-depth analysis of each facet of Sonoma County, the information can be used as a starting point for more detailed research. Residents, businesses, and organizations in Sonoma County are invited to offer other indicators for possible inclusion. Please submit written suggestions/comments to the EDB at [edb@sonoma-county.org](mailto:edb@sonoma-county.org), or fax to (707) 565-7231.

The Indicators were developed from established national and local data sources based on models from Economic Development Alliance for Business (EDAB), Sierra Economic Development District, and the Joint Venture Index of Silicon Valley. The Sonoma County Economic Development Board (EDB) thanks these organizations for allowing the EDB to incorporate some of their data and approaches into this report.

Each graph includes the source of information for that data set and can be further researched through the source agency's website.

## NOTES:

<sup>1</sup>The Sonoma County Economic Development Board's main purpose in creating these Index was to provide a preliminary, comparative study on various economic, demographic and social facets of Sonoma County. The EDB confined its research to information available on websites and previously published material, citing the appropriate source with each data set. The EDB did not attempt to analyze the data or present it in a specific format. The EDB has received feedback on the Indicators from various community organizations and leaders, incorporating their suggestions wherever possible. The Indicators are high-level effort to quantify aspects of Sonoma County, and should not be used as decision-making tools.

<sup>2</sup>The template for this project stemmed from the Economic Development Alliance for Business (EDAB), Sierra Economic Development District (SEDD), and the Joint Venture Index of Silicon Valley (JVISU) because of their previous experience with this type of material and their successes with their respective projects. Some of the information and type of format provided in these Indicators is based on EDAB, SEDD, JVISV, but is adjusted for a pictorial format. The EDB used various measures to compute the data, sometimes relating the numbers to percentages, time periods or national indices.

<sup>3</sup>The Indicators are designed to provide a snapshot in time of Sonoma County in comparison to other regions, and the data presented is as accurate as the source agency's information permits. The data sets vary across time periods chosen by source agencies. Most data sets refer to counties as designated by EDAB or the US Census, unless specified.

<sup>4</sup>For purposes of illustration, Metropolitan Statistical Areas (MSA) were used, as defined by the US Census. When not expressly cited as data from the MSA, individual county or city data is shown depending on the chart. The San Francisco MSA includes Marin County, San Francisco County and San Mateo County. The San Jose MSA includes Santa Clara County. The Oakland MSA includes Alameda County and Contra Costa County. The Sacramento MSA includes Sacramento County, Placer County and El Dorado County. The Santa Rosa MSA includes Sonoma County. The Vallejo MSA includes Napa and Solano counties. The Bay Area refers to Alameda County, Contra Costa County, Marin County, Napa County, San Francisco County, San Mateo County, Santa Clara County, Solano County, and Sonoma County.

# Methodology

<sup>5</sup>The diversity index on page 6 is defined as the extent to which an ethnicity's population approximates the U.S. ethnic structure. The diversity index is derived using the following formula:  $1/\sum_i ((ETH_i/ETH_{US_i}) * ETH_{ii})$ , where ETH= share of ethnicity in the whole population during 1980-2000. For example, Sonoma County is 1/2 as diverse as the United States. The Bay Area label refers to the preceding nine counties listed in the same chart. Further information can be found at [www.edab.org](http://www.edab.org).

The following is a list of websites used for the 2003 Indicators.

Employment Development Dept.: <http://www.edd.ca.gov>

Economic Development Alliance for Business: <http://www.edab.org>

Economic Development Board: <http://www.sonoma-county.org/edb>

Keegan & Coppin: <http://www.keegincoppin.com>

Joint Venture of Silicon Valley: <http://www.jointventure.org>

Association of Bay Area Gov't's.: <http://www.abag.org>

No. CA Council for the Community: <http://www.nccsf.org>

CA Air Resources Board: <http://www.arb.ca.gov>

Sonoma County Tourism Program: <http://www.sonomacounty.com>

Children Now: <http://www.childrennow.org/california/rc-2001/sonoma.pdf>

Sonoma County: <http://www.sonoma-county.org>

CA Dept. of Social Services: <http://www.dss.cahwnet.gov/research>

Labor Market Information: <http://www.lmi4ed.ca.gov>

US Census: <http://www.census.gov>

CA Dept. of Finance: <http://www.dof.ca.gov>

RIDES for Bay Area Commuters Inc.: <http://www.rides.org>

Sierra Economic Development District: <http://www.sedd.org>

Housing & Urban Development: <http://www.hud.gov>

Federal Bureau of Investigation: <http://www.fbi.gov>

CA Dept. of Health Services: <http://www.dhs.cahwnet.gov>

CA Dept. of Education: <http://www.cde.ca.gov>

CensusScope: <http://www.censuscope.org>

# Acknowledgements

Many people contributed their time and ideas to this project. Special thanks go to the Department Heads, City Council Managers, Carl Wong (Superintendent of Sonoma County Office of Education), Jerry Dunn (Director of Sonoma County Workforce Investment Board), Steve Herron (Chair of the Workforce Investment Board), Jim Bielenberg (Chair of the Sonoma County Economic Development Board), Don Bennett, Brian Kelsey, Joe Horak, and the Project Coordinators of the Sonoma County Economic Development Board for their input and close reading of this report.

Nikhila Raj did a remarkable job of compiling these different Indicators and placing them in appropriate graphs and context. This effort took several months to accomplish, and Nikhila Raj undertook them in a diligent and dedicated way.

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# Area



Source: Sonoma County Government website

\* This map may not include all areas in Sonoma County.