

Sonoma's Vital Signs

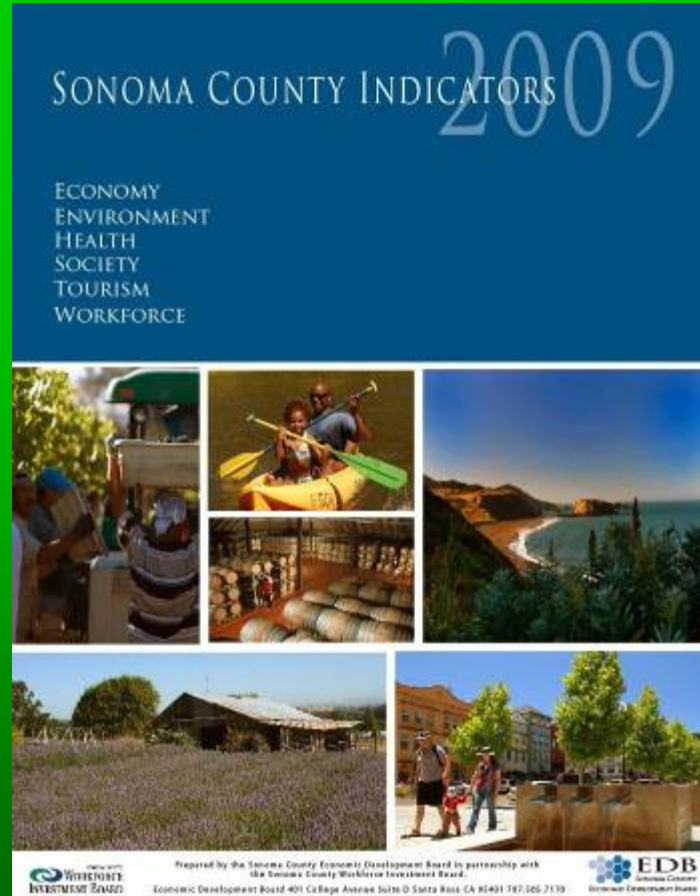


**Ben Stone, Executive Director
Economic Development Board
January 21, 2009**

Today's Agenda

- **Community Indicators**
- **Economic Forecast**
- **Innovation Council Report**
- **2009 State of the County**

2009 Sonoma County Indicators



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WITH ACKNOWLEDGMENT AND APPRECIATION TO LOCAL KEY BUSINESSES
SUPPORTING SONOMA COUNTY ECONOMIC DEVELOPMENT:

CHAIRMAN'S CIRCLE:



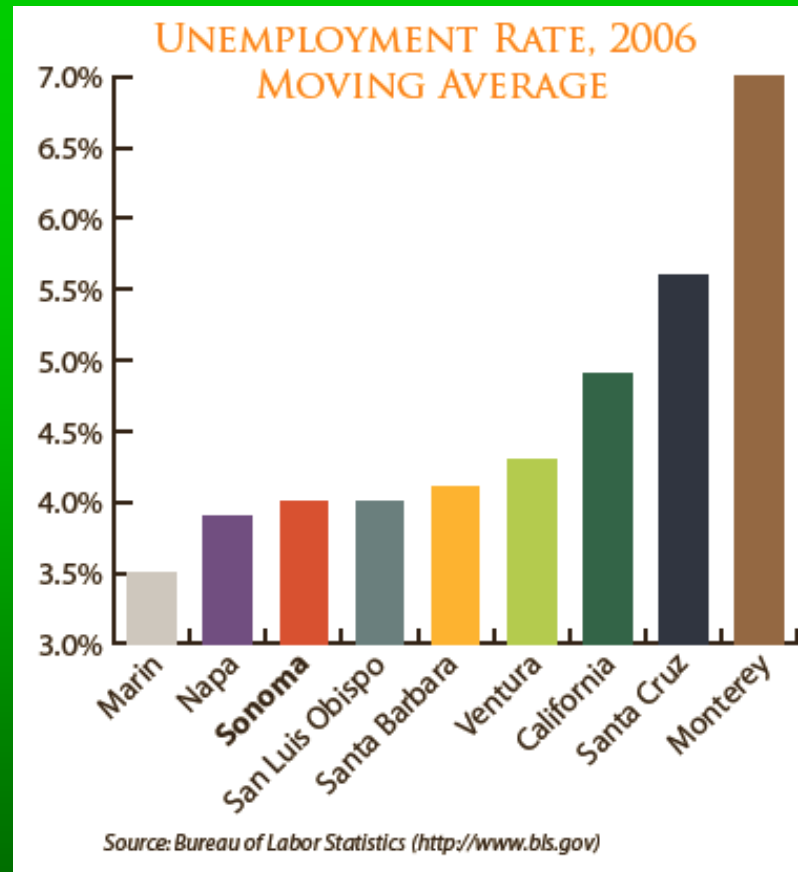
UNDERWRITERS:



County of Sonoma General Services, Real Estate Division
Sonoma County Permit & Resources Management County of Sonoma Board of Supervisors
Sonoma County Health Services Sonoma County Transportation & Public Works

www.sonomaedb.org

What is an Indicator?



Trendlines

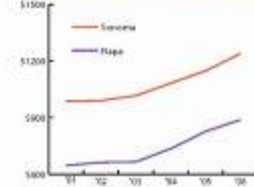
TRENDLINES

CHANGE AND SONOMA COUNTY

A trendline is a line which displays changes in data over time. It shows whether a particular time series data set has increased or decreased over a certain period. Trendlines offer a simple way to identify or confirm changes in community indicators over time.

In this section are graphs capturing Sonoma County trends in each of the Indicators' six areas of focus: economy, environment, health, society, tourism and workforce. The trendlines offer a glimpse into each area, but for more information on the topics, please refer to the listed sources and pages.

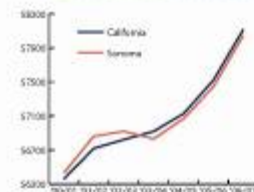
TOTAL DESTINATION SPENDING GENERATED BY TRAVEL SPENDING, 2001-2006 (\$MILLIONS)



For more information on tourism, see page 26.

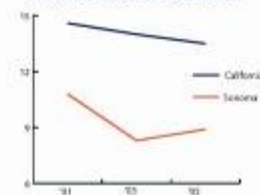
Source: California Travel Program by County, 2006. Prepared by the Division of Tourism, California Trade and Commerce Agency by Susan Reynolds-Kawachi, JMW (www.visitcalifornia.com/)

EXPENDITURE PER STUDENT



For more information about society, see page 25.
Source: California Department of Education (www.ednet.sdcag.edu/)

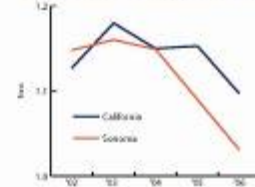
PERCENTAGE OF PEOPLE WITHOUT HEALTH INSURANCE



For more information on health, see page 22.

Source: California Health Interview Survey, 2002, 2003 and 2005.

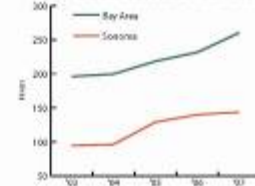
SOLID WASTE GENERATED PER CAPITA



For more information on the environment, see page 15.

Source: Environmental Protection Agency (www.epa.gov/)

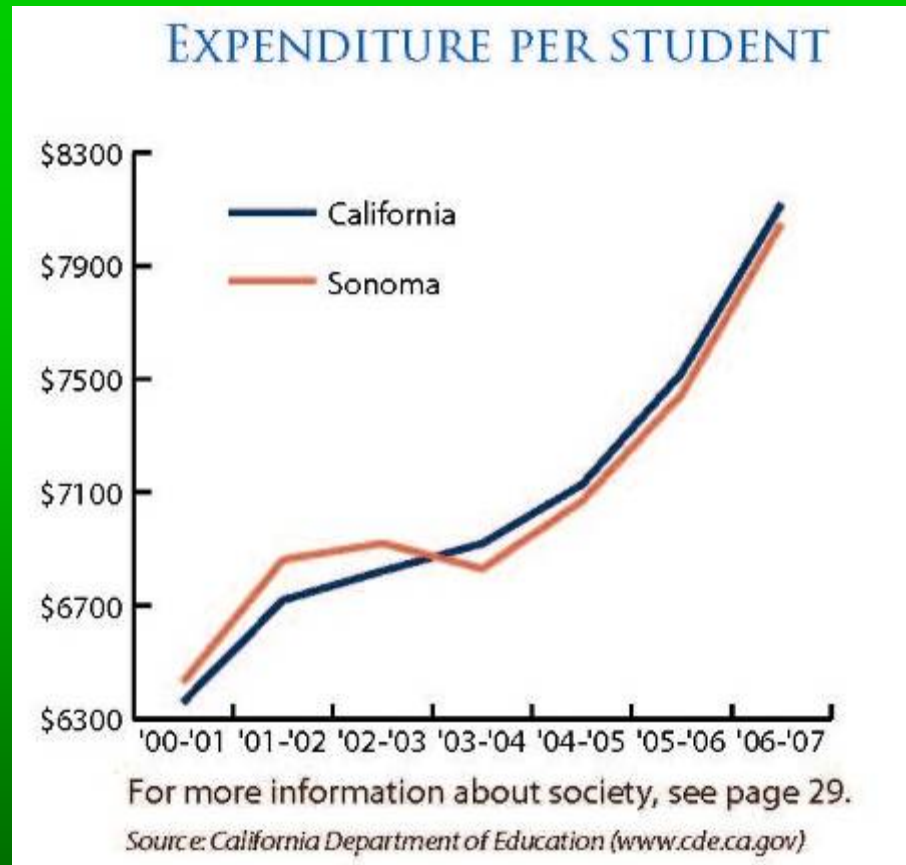
WEEKDAY VEHICLE HOURS OF DELAY PER FREEWAY MILE



For more information on the economy, see page 5.

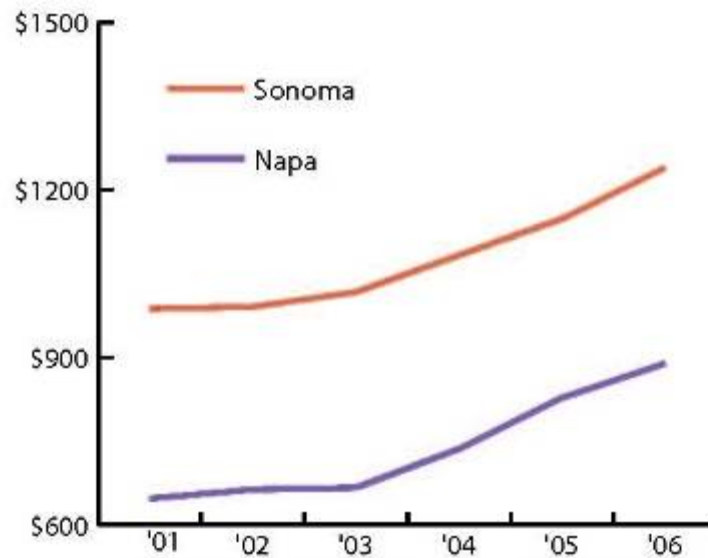
Source: California Metropolitan Transportation Commission (www.mtc.org/)

Expenditure per Student Increasing



Tourism Spending Up

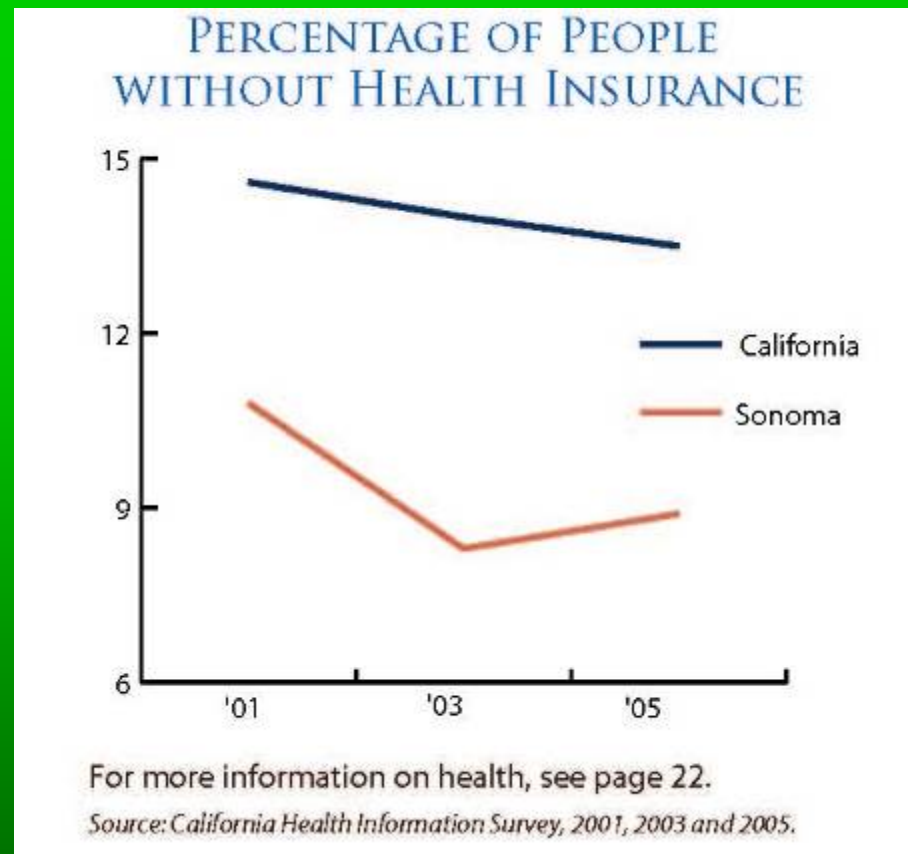
TOTAL DESTINATION SPENDING GENERATED BY TRAVEL SPENDING, 2001-2006 (\$MILLIONS)



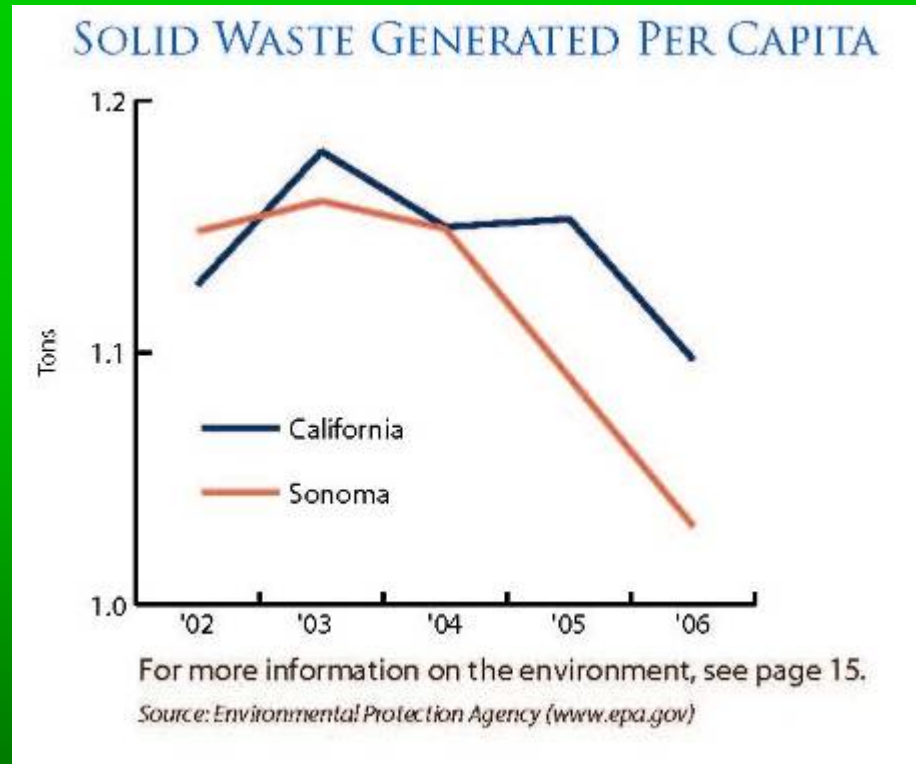
For more information on tourism, see page 36.

Source: California Travel Impacts by County, 2006. Prepared for the Division of Tourism, California Trade and Commerce Agency by Dean Runyan & Associates, 2006 (www.visitcalifornia.com)

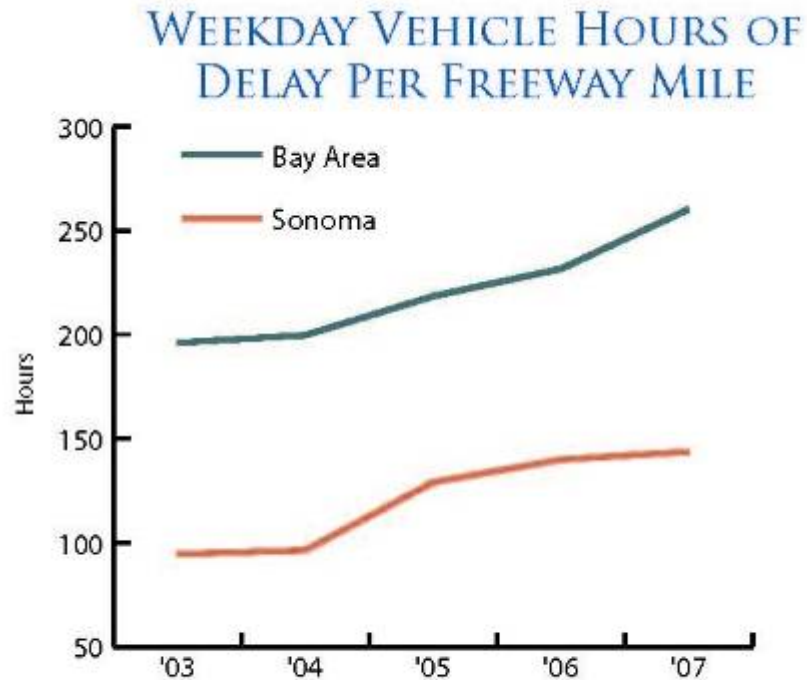
More with Health Insurance



Less Solid Waste



Fewer Delays



For more information on the economy, see page 5.

Source: CalTrans, Metropolitan Transportation Commission (www.mtc.ca.gov)

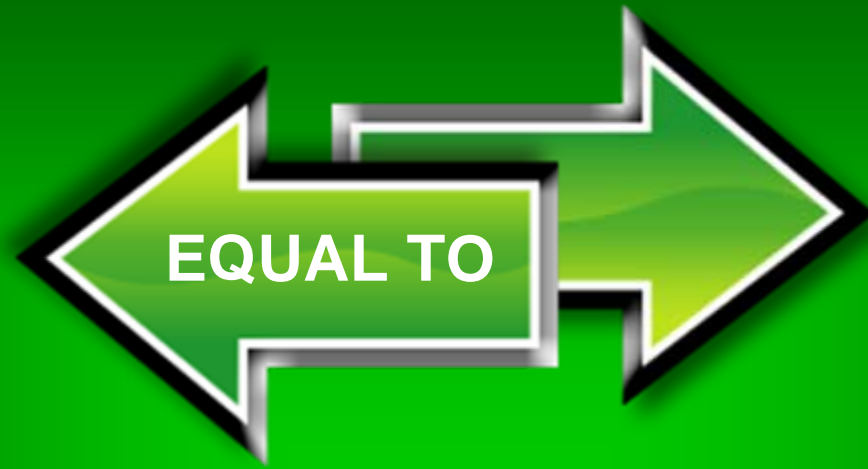
Report & Score Cards

HOW DOES SONOMA COUNTY COMPARE?					
PERFORMANCE SCORECARD	Sonoma County's Performance Relative to Comparable California Counties*	Sonoma County's Performance Relative to California Average	Sonoma County's 2009 Year-Over-Year Performance Relative to California Average	KEY	
ECONOMY					
Unemployment Rate	▲	▲	◆	The value or trend is... ▼ less positive than ▲ more positive than ◆ equal to — not directly comparable to ...the compared area.	
Firm Establishment Growth	◆	▲	◆		
Income Equality	▲	▲	◆		
ENVIRONMENT					
Air Quality	◆	—	—	*COMPARISON COUNTIES Relative comparisons help gauge Sonoma County's quality of life. In this report, Sonoma County indicators are compared to counties which share similar economic and demographic attributes; these are Marin, Mendocino, Napa, San Luis Obispo, Santa Barbara, Santa Cruz and Ventura. Like Sonoma, these counties have strong tourism, agriculture and technology sectors; their residents enjoy a high quality of life; and they are located in proximity to the coast. In addition to these, the State of California average is included in comparisons for further reference.	
Waste Per Capita	◆	—	—		
SOCIETY					
Educational Attainment	▲	▲	▲	Like Sonoma, these counties have strong tourism, agriculture and technology sectors; their residents enjoy a high quality of life; and they are located in proximity to the coast. In addition to these, the State of California average is included in comparisons for further reference.	
Crime Rate	▲	▲	◆		
TOURISM					
Jobs Created by Tourism	◆	—	—		
Tax Receipts Generated by Tourism	◆	▲	▲		
WORKFORCE					
Unemployment Rate	◆	▲	◆		
Percent of Residents Able to Afford Fair-Market Housing	▼	▼	◆		
HEALTH					
Percent of Residents with Health Coverage	▲	▲	◆		

INDEX REPORT CARD	ECONOMY				EQUITY				ENVIRONMENT				Average Overall Score			
	Unemployment rate	Payroll growth	Establishment Growth	Job Growth	Average County Score	Income Distribution	Middle-Income Households	College Enrollment	Educational Attainment	Average Equity Score	Air Quality	Waste Per Capita		Natural Gas Use Per Capita	Electricity Use Per Capita	Average Environment Score
Santa Barbara	8.3	6.0	4.1	4.0	5.6	4.0	2.3	6.3	2.3	3.7	6.3	5.6	8.0	9.0	7.2	5.5
Santa Cruz	4.0	0.0	7.9	0.0	3.0	3.7	2.2	6.0	5.7	4.4	9.7	10.0	10.0	6.3	9.0	5.5
San Luis Obispo	8.6	5.5	6.6	4.0	6.2	6.6	0.0	10.0	2.2	4.7	1.3	5.9	8.4	2.6	4.6	5.1
Ventura	7.7	8.1	0.0	3.0	4.7	10.0	10.0	1.7	2.7	6.1	0.0	1.0	8.7	5.9	3.9	4.9
California	6.0	7.6	4.5	10.0	7.0	5.0	1.1	2.2	2.1	2.6	—	—	—	—	—	4.8
Sonoma	8.6	4.3	4.5	3.0	5.1	7.8	1.9	1.7	2.5	3.5	8.9	5.6	7.0	1.2	5.7	4.8
Mendocino	0.0	3.1	3.4	3.0	2.4	5.3	3.8	2.1	0.0	2.8	9.9	4.2	10.0	10.0	8.5	4.6
Napa	8.9	10.0	3.9	2.0	6.7	3.0	1.8	1.2	0.9	1.7	9.8	0.0	7.0	0.0	4.2	4.2
Marin	10.0	0.0	10.0	0.0	5.0	0.0	1.5	0.0	10.0	2.9	10.0	5.0	0.0	1.0	4.0	4.0

4 | www.sonomaedc.org

*Note: Scores reflect a relative ranking between 1 and 10. A score of 8 simply signifies that a county performed the worst among its peers, while "0" means a county performed the best. For methodology and notes, see page 16.



- **Air quality**
- **Waste per capita**
- **Jobs created by tourism**
- **Business growth**

**LESS
POSITIVE**

**Residents able
to afford fair
market housing**



MORE POSITIVE



- **Crime rate**
- **Income equality**
- **Educational attainment**
- **Residents with health coverage**

Overall, Sonoma is Competitive

Strength: Quality of Life

Challenge: Sustainable Economy

Next up...

- **Dr. Steve
Cochrane**

**Moody's
Economy.com**

