

2016 Sonoma County Indicators



Economy, Environment, Health, Society, Tourism, Workforce

● UNABRIDGED EDITION ●

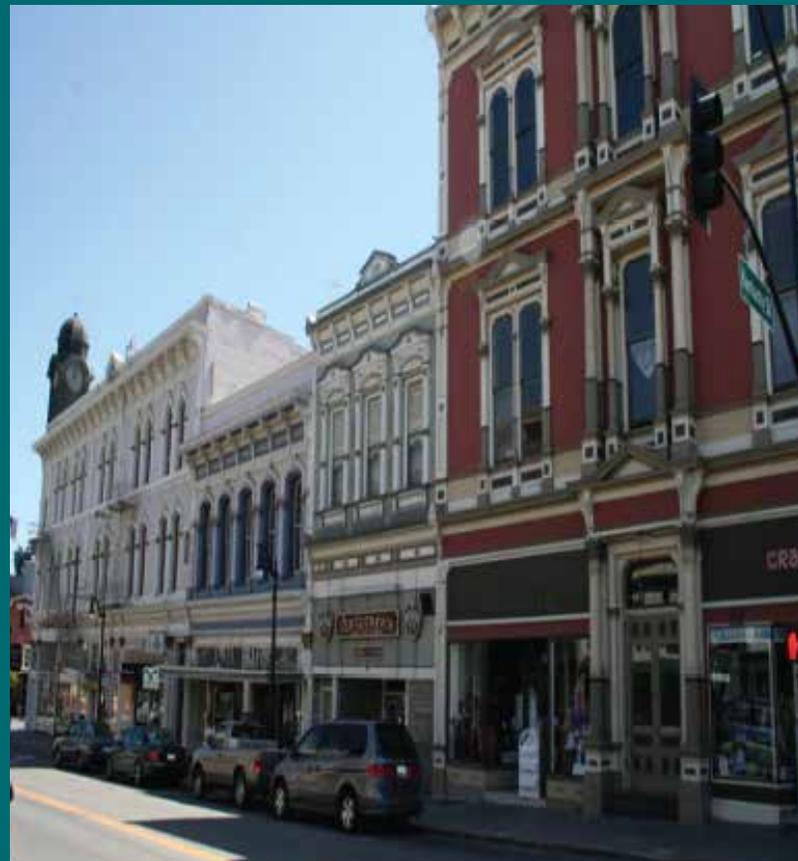


Table of Contents

- 2. Scorecard
 - 4. Highlights
 - 6. How Competitive is Sonoma County?
-

Economy

- 8. Payroll & Unemployment
 - Job & Establishment Growth
 - Income Distribution
 - Major Industries
 - Mobility
-

Workforce

- 13. Workforce Trends
 - Industrial Trends
 - Occupational Trends
 - Earnings
-

Tourism

- 17. Destination Spending
 - Industry Employment
 - Lodging Industry Performance
 - Tourism Related Taxes
 - Industry Earnings
-

Society

- 22. Education
 - Demographics
 - Crime & Safety
 - Housing
-

Health

- 27. General Health
 - Drug & Alcohol Use
 - Youth Health Trends
 - Access to Healthcare
 - Health Centers
-

Environment

- 32. Environmental Quality
 - Energy Usage & Renewable Capacity
 - Air Quality & Open Space
 - Water Conservation
 - Waste Disposal & Composition
-

- 37. Methodology & Sources

2016 Sonoma County Indicators

The Sonoma County Economic Development Board (EDB) is pleased to present the *2016 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 2016, in an effort to provide the most current and comprehensive annual data.

The report features a "How Competitive is Sonoma County?" section intended to measure regional competitiveness based on quality of life, which is instrumental in talent attraction, as well as the regional cost advantages of operating a business.

Some highlights and challenges in this report include:

- Sonoma County is a competitive place to do business both because of an attractive business climate as well as the high quality of life, as shown through the high scores on the Quality of Place Index. (pg. 4-5)
- The seasonally unadjusted unemployment rate for Sonoma County was 4.1% in March 2016, placing it 3rd among comparable counties, 6th out of all counties in California and below the state and national unemployment rates. Job growth in Sonoma County was 2.3% from 2014 to 2015, above the California job growth rate. (pg. 8-9)
- Water use in Sonoma County decreased by 9.9% from 2014 to 2015, following a 14% decrease from 2013 to 2014. 89% of days in 2015 were classified as "good" air quality in Sonoma County, with no "unhealthy" air quality days. (pg. 34-35)
- Tourism indicators are overwhelmingly positive. Sonoma County's tourism industry added 400 jobs, about 2% growth, from 2014 to 2015. Destination spending increased 11% from 2014 to \$1.82 billion in 2015, and hotels had a 76% average occupancy rate in 2015, up 2% from 2014. (pg. 17-19)

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. 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
Pamela Chanter
Chair
Economic Development Board

Ben Stone
Ben Stone
Executive Director
Economic Development Board

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Scorecard

This scorecard rates the key indicators from each section of the report, and shows where Sonoma County currently stands in comparison to its previous performance. Ratings are based on year over year comparisons using the latest available data.

- Lagging** means that conditions have worsened.
- Stable** indicates no change in conditions.
- Exceeding** signifies that conditions have improved.

Detailed historical data, graphic illustrations, and explanations for each indicator can be found within the report.

Economy		
Indicator	Rating	Page
Unemployment Rate	Exceeding	8
Job Growth	Stable	9
Average Weekly Wages	Exceeding	11
Payroll Growth	Exceeding	8
Business Establishment Growth	Lagging	9
Real GDP per Capita	Exceeding	10
% below Federal Poverty Line	Exceeding	10
Airport Passengers	Exceeding	12
Workforce		
Indicator	Rating	Page
Labor Force	Exceeding	13
High School & Less than HS Earnings	Lagging	16
Some College/Bachelor's Earnings	Stable	16
Graduate/Professional Earnings	Stable	16
Median Household Income	Exceeding	16
Construction Jobs	Exceeding	14
Health Care & Social Assistance Jobs	Exceeding	14
Leisure & Hospitality Jobs	Exceeding	14
Tourism		
Indicator	Rating	Page
Destination Spending	Exceeding	17
Tourism Employment	Exceeding	17
Average Daily Hotel Rate	Exceeding	19
Average Hotel Occupancy Rate	Exceeding	19
Accommodations & Food Earnings	Exceeding	21
Arts, Entertainment, & Rec. Earnings	Exceeding	21
Auto Rental Earnings	Exceeding	21
TOT Tax Revenue Collected	Exceeding	20

Scorecard

This new feature provides a simple, visual method of evaluating Sonoma County's performance over the past year.

While the following sections of this report provide detailed regional comparisons and historical data, the concise assessment on these two pages can help to easily identify concerning trends and areas that require improvement.

This scorecard can guide discussions by local business, government, community and workforce leaders to shape policies and strategies for our region's future.

Society		
Indicator	Rating	Page
Pupils Per Teacher	Exceeding	22
High School Graduation Rate	Exceeding	22
SAT Scores	Lagging	23
Rate of Natural Increase	Exceeding	24
Violent Crime Rate	Stable	25
Property Crime Rate	Stable	25
Median Home Price	Exceeding	26
Housing Afford-ability	Lagging	26
Health		
Indicator	Rating	Page
Health Insurance Coverage	Exceeding	27
Patients Seen at Health Centers	Exceeding	31
Age-adjusted Death Rate	Exceeding	27
Infant Mortality Rate	Exceeding	27
% of people that have never smoked	Exceeding	28
Youth in Poverty	Exceeding	29
Kindergartners with Req. Immunizations	Exceeding	29
Number of People per Physician	Stable	30
Environment		
Indicator	Rating	Page
Energy Consumption	Exceeding	32
Waste Disposal per Capita	Stable	36
Hazardous Waste Collection Participants	Stable	36
Renewable Energy Capacity	Exceeding	35
Water Usage per Capita	Exceeding	34
Reservoir Water Storage	Exceeding	34
Air Quality	Exceeding	33
Acreage of Protected Lands	Exceeding	33

Highlights



40% of the population over age 45

GDP per capita rose 6.7% to \$43,757 from 2009 to 2014



4.1% unemployment March 2016

Increasing health insurance coverage across all age groups



76% average hotel occupancy rate in 2015

10% water usage decrease from 2014-2015



Construction industry output remains much lower than pre-recession levels

Office space 111% cheaper than San Francisco





19.6 pupils per teacher:
2nd lowest among
comparable counties

25,800 Businesses
in 2015



Health Care and
Social Assistance:
most job growth
since the recession

19,710 jobs
generated by
Destination Spending



109 Quality of Place
Index Score - 2nd among
comparable counties

Cancer and Heart
Disease account for
almost 1/2 of all deaths



89% of days with
“good” air quality,
no “unhealthy” days

Construction is fastest
growing industry at 9.5%
over the past year



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 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 is primarily due to good air quality, a low average commute time, and high percentage of high school graduates. These individual measures are summarized below.

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 third behind Monterey County and Santa Cruz County with 'good' air quality for 87% of days in 2015.

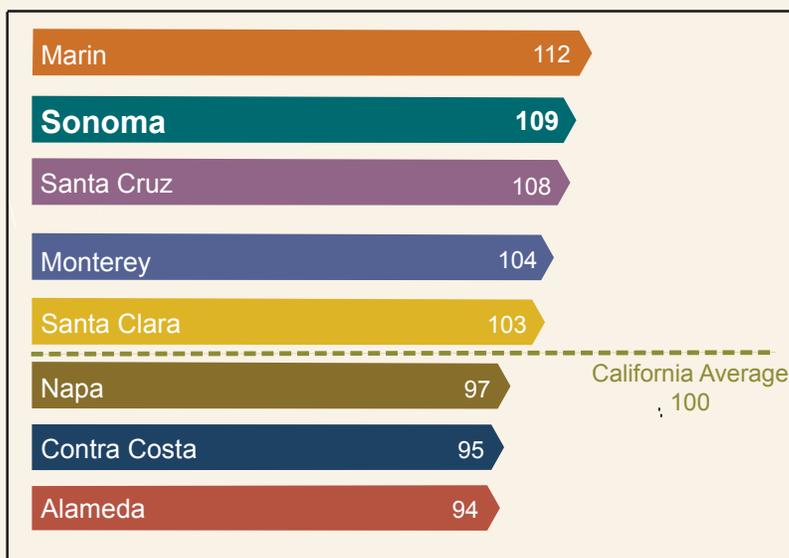
High School Graduates: This indicator represents the percentage of adult population (25+) with a high school diploma or higher. The better educated the regional workforce, the more quickly an economy can take advantage of new opportunities and recover from negative shocks. Sonoma County ranked third among comparable counties with 87.3% of residents obtaining a high school diploma.

Commute Time: The commute time measures the average time spent commuting by county residents. Sonoma County ranked 3rd among comparable counties with an average time of 24.4 minutes.

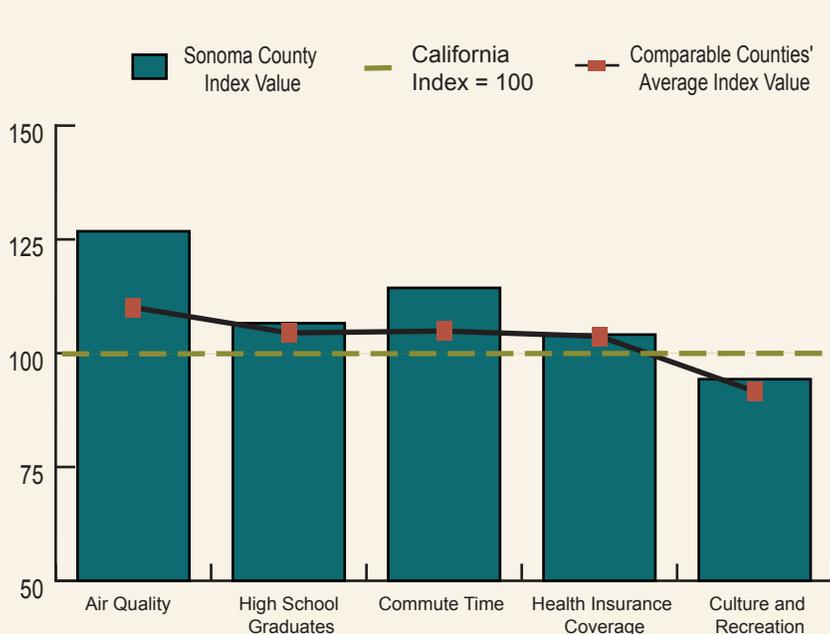
Health Insurance Coverage: The number of individuals with health insurance coverage has seen an increase in recent years. Sonoma County ranked fifth among comparable counties with 84% of residents having health insurance coverage.

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 third among comparable counties for culture and recreation with an index score of 94.

Quality of Place Index 2015-2016



Indicators for Quality of Place Index
Sonoma County 2015-2016



Source All: Environmental Protection Agency (www.epa.gov), ESRI Business Analyst (bao.arcgis.com), U.S. Census Bureau (www.census.gov), California EDD (edd.ca.gov).

How Competitive is Sonoma County?

Business Attraction: We have 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.

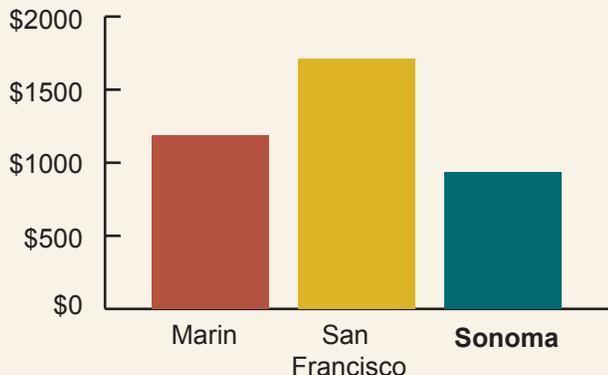
Cost of Doing Business Comparison

Marin County	San Francisco County	Sonoma County
Lease Rates (annual rate)		
<ul style="list-style-type: none"> Office Space: \$28.80 psf Industrial Space: \$19.20 psf 	<ul style="list-style-type: none"> Office Space: \$68.14 psf Industrial Space: \$30.43 psf 	<ul style="list-style-type: none"> Office Space: \$19.62 psf Industrial Space: \$9.24 psf
<small>Sources: Marin and Sonoma County Rates: Keegan and Coppin, (keegancoppin.com) San Francisco Rates: LoopNet, (loopnet.com)</small>		
Average Weekly Wages		
<ul style="list-style-type: none"> \$1,185 per week 	<ul style="list-style-type: none"> \$1,712 per week 	<ul style="list-style-type: none"> \$935 per week
<small>Source: 3rd Quarter, 2015, U.S. Bureau of Labor Statistics, (www.bls.gov)</small>		
Tax Rates		
<ul style="list-style-type: none"> Sales Tax: 8.70% Property Tax: 1.05% 	<ul style="list-style-type: none"> Sales Tax: 8.75% Property Tax: 1.12% 	<ul style="list-style-type: none"> Sales Tax: 8.34% Property Tax: 1.04%

Sources: Sales Tax: Average of Rates for Individual Cities Within Each County: (www.california-sales-tax-rate.insidegov.com)
Property Tax: Effective Rate with Low Bond Indebtedness: (www.BeSmarter.com)

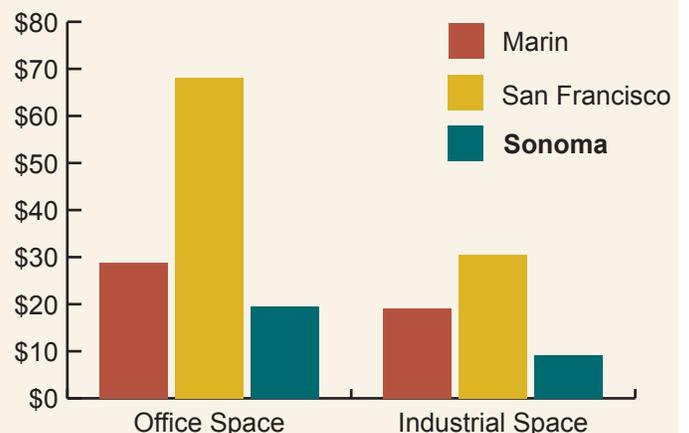
Sonoma County has lower commercial property lease rates, average weekly wages, as well as sales and property tax rates, therefore lowering the cost of doing business compared to Marin and San Francisco Counties. This low cost of doing business combined with a high quality of place index score puts Sonoma County in a good position to attract new and existing business ventures. **An average 20-employee company will save \$370,000 to \$500,000 annually in payroll and rent expenditures in Sonoma County compared to Marin and San Francisco.**

Average Weekly Wages, Q3, 2015



Source: 3rd Quarter, 2015, U.S. Bureau of Labor Statistics, (www.bls.gov)

Annual Lease Rates, 2015



Sources: Sonoma and Marin: Keegan and Coppin, San Francisco: LoopNet

Economy

Unemployment Rate & Payroll Growth

Unemployment Rate

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.

Higher unemployment rates typically portend economic downturns and decrease the ability of members of the workforce to generate income. On the contrary, lower unemployment rates represent a stronger economy, and are usually accompanied by wage increases as employers face employee shortages.

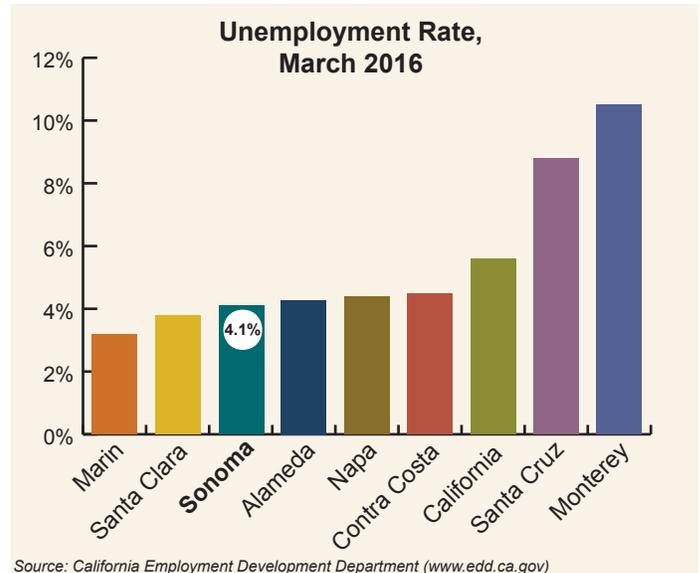
Sonoma County's unemployment rate was 4.5% in 2015, one of the lowest in eight years, and below average among comparable regions. The county's unemployment rate has historically been better than the state and national rates, and **in March 2016, the unemployment rate was 6th lowest in the state, and 3rd lowest among comparable counties at 4.1%.**

Payroll Growth

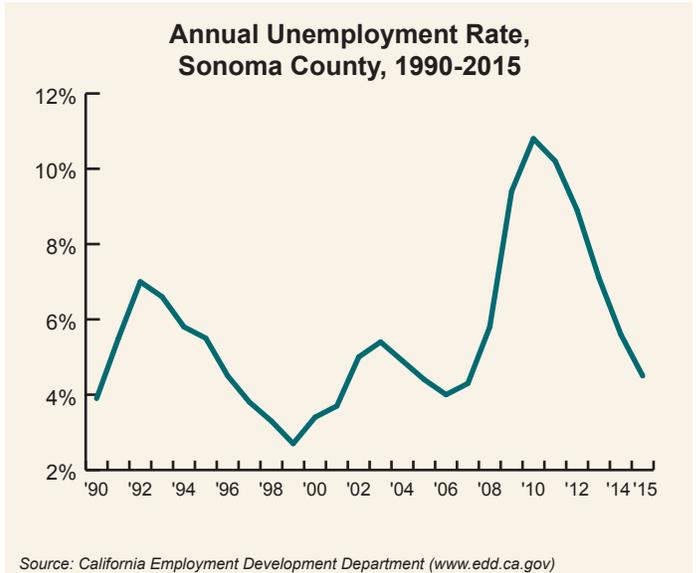
Payroll growth measures the percentage increase in aggregate compensation over the one-year period from 2014 to 2015. Total payroll measures the total wages in thousands of dollars from 2002 to 2015.

Payroll growth provides a measure of general business performance and the level of available consumption and savings activity in the local economy.

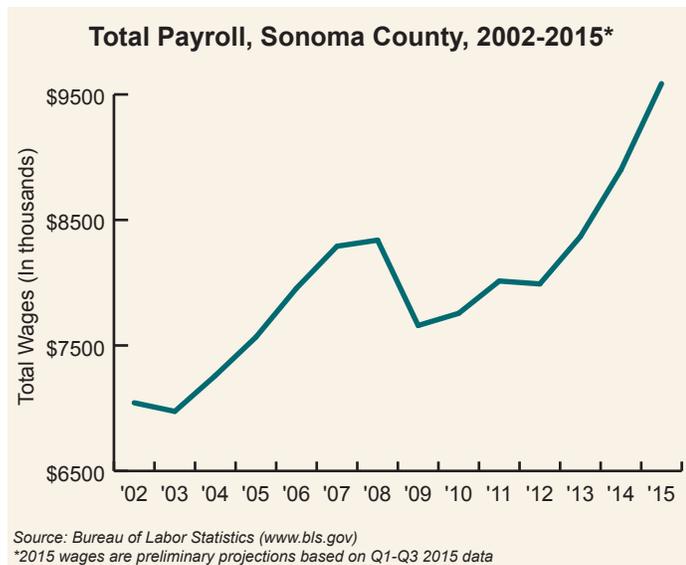
There has been steady, positive payroll growth from 2009 to 2015 and total payrolls have grown 25% from the recession low in 2009 to the current peak in 2015. Sonoma County had the fourth highest payroll growth rate among comparable counties over the past year with an increase of 7.4%.



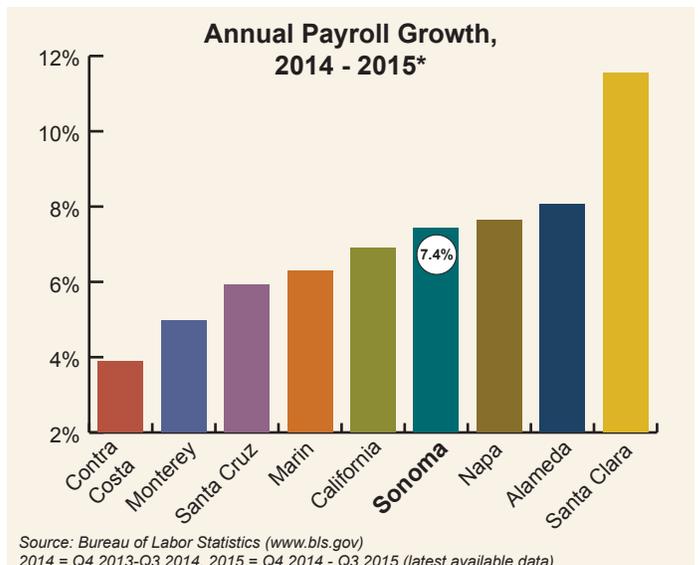
Source: California Employment Development Department (www.edd.ca.gov)



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



Source: Bureau of Labor Statistics (www.bls.gov)
*2015 wages are preliminary projections based on Q1-Q3 2015 data



Source: Bureau of Labor Statistics (www.bls.gov)
2014 = Q4 2013-Q3 2014, 2015 = Q4 2014 - Q3 2015 (latest available data)

Job & Establishment Growth

Job Growth

Sonoma County experienced 2.3% job growth from 2014 to 2015, placing it 5th among comparable counties. While tech-driven Santa Clara County stands out, most other comparable counties are clustered near the California average, between 2% and 2.5% annual job growth.

Sonoma County's 2.3% job growth over the past year is only marginally lower than the 2.4% job growth from 2013 to 2014, indicating a steady long-term trend of increasing employment. **As the economy reaches full employment, job growth is expected to slow in comparison to the fast growth recovery years following the recession.**

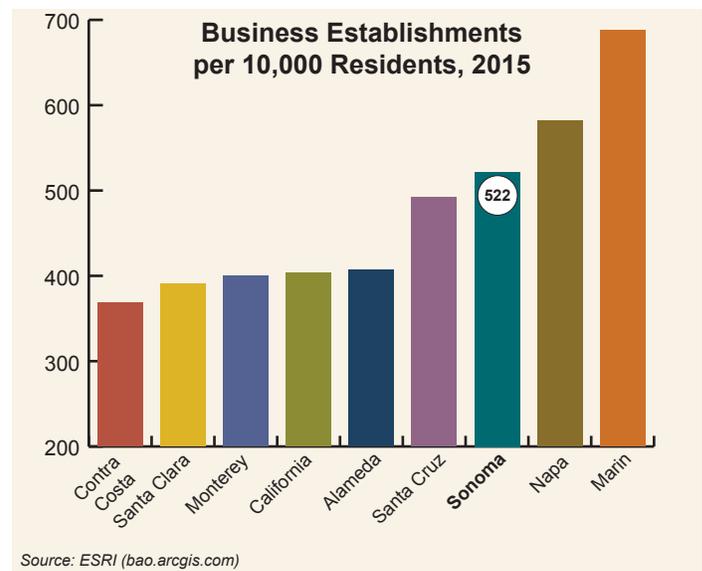
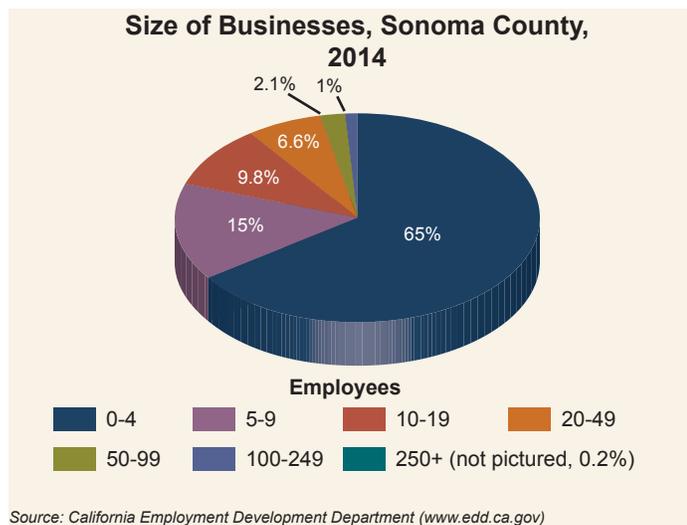
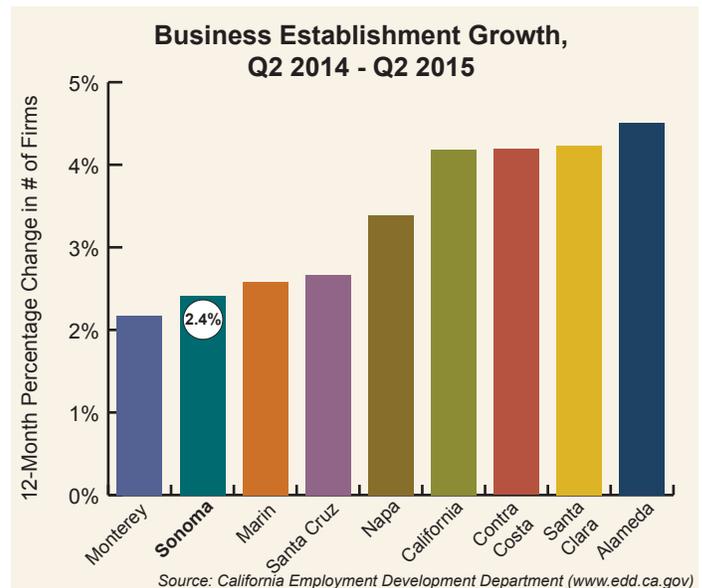
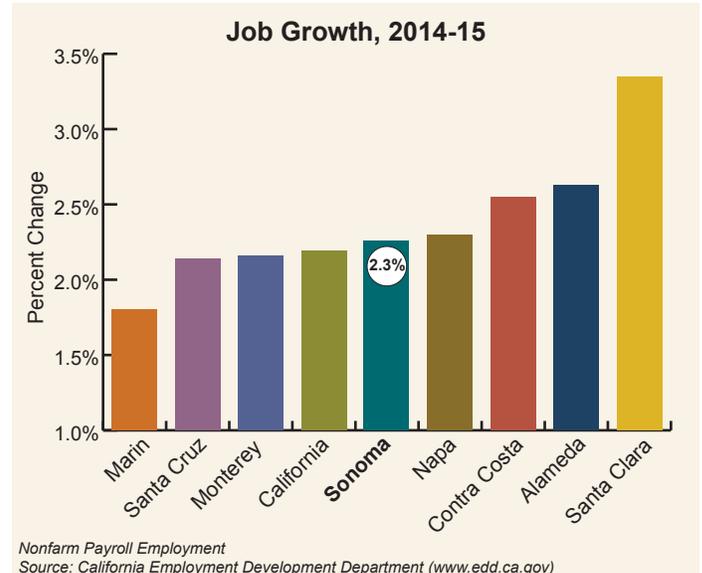
Establishment Growth

Business establishment growth captures the net increase or decrease in businesses, providing a reliable measure to track if more firms are opening versus shutting down. **Business establishments increased across all comparable counties between 2014 and 2015.** This marks the third consecutive year of business establishment increases, following negative business establishment growth from 2011 to 2012.

Sonoma County has the third-highest number of business establishments per resident, trailing only Napa and Marin Counties. **Sonoma County's 522 business establishments per 10,000 residents indicates a high level of economic activity and entrepreneurship.**

Establishment Characteristics

The majority of businesses (65%) in Sonoma County have between 0-4 employees, showing the importance of small businesses to our economic prosperity. An additional 15% of businesses have 5-9 employees, meaning that a total of **80% of Sonoma County businesses have less than 10 employees.**



Economy

Income Distribution

Poverty

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 2015 poverty threshold for a family of four was \$24,230. However, official poverty calculations assume that a family earning a given income is equally well off anywhere in the country. Thus, due to the above-average costs of living in the Bay Area, the amount of people living in poverty is likely higher.

Reversing prior trends of increasing poverty, **the percent of people living below the poverty line decreased between 2013 and 2014 for Sonoma County**, California, the United States, and most comparable counties.

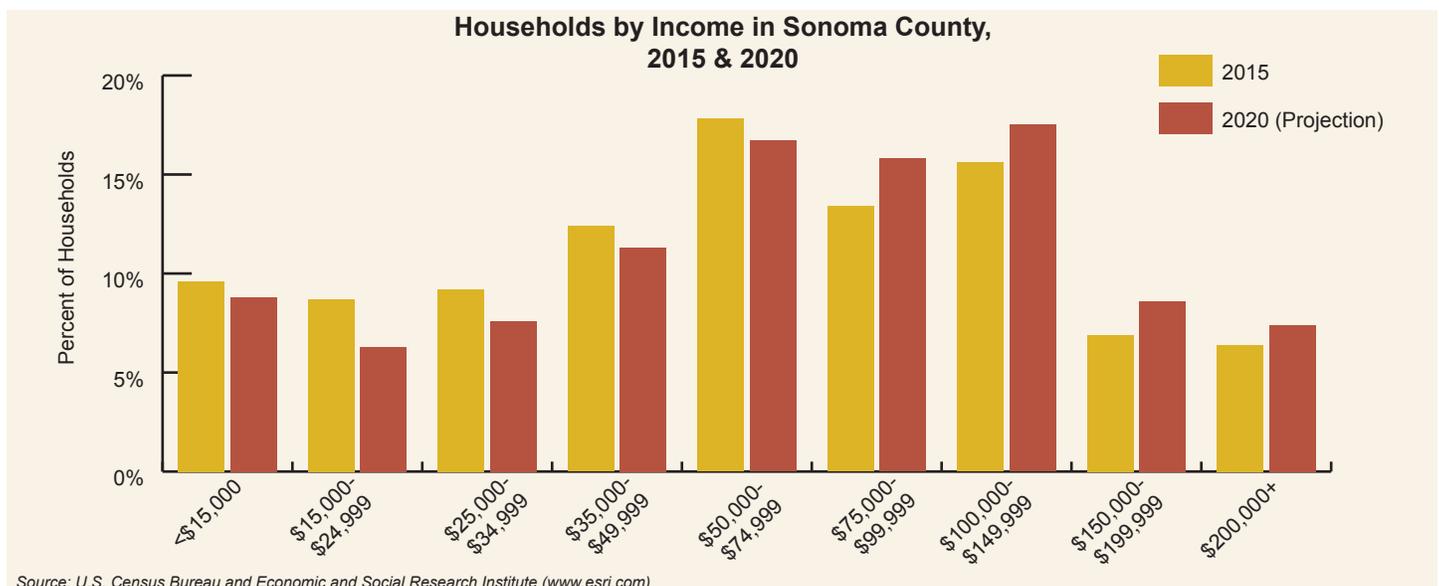
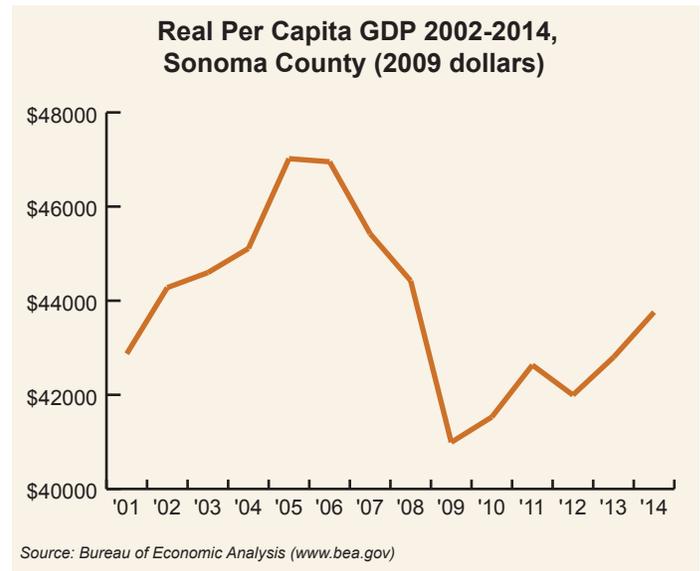
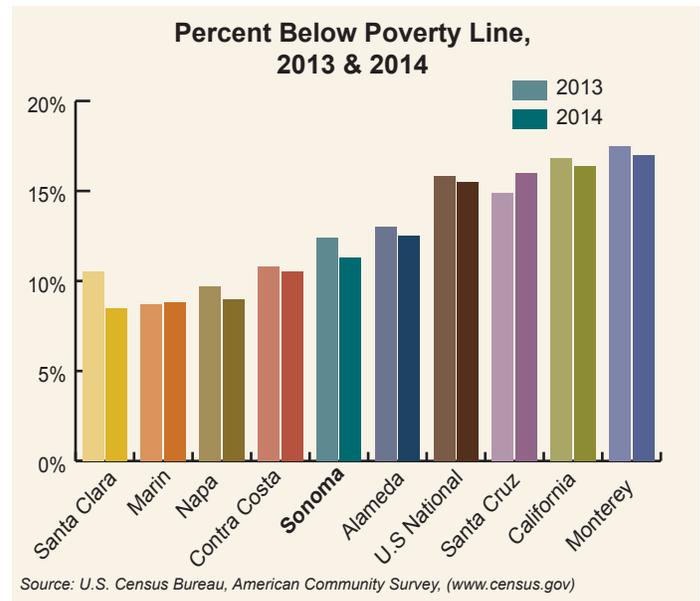
Sonoma County saw one of the largest reductions among comparable counties in the percent of people living below the poverty line **from 12.4% in 2013 to 11.3% in 2014**.

GDP per Capita

From 2009 to 2014, real per capita GDP in Sonoma County increased 6.7% to \$43,757. Real per capita output has been growing again in the county, after a precipitous decline during the recession from 2006-2009.

Household Income Levels

Currently, the most represented household income bracket in Sonoma County is \$50,000-\$74,999. Over the next 5 years, **the percentage of households earning less than \$35,000 is projected to decline 4.8 percentage points to 22.7%**, reflecting a shift of households into middle-upper income tiers.



Major Industries

Industry Employment Trends

Over the past year from 2014 to 2015, employment increased for nearly all industries, indicating a broad based recovery and move into economic expansion. The leading industries for employment growth were **Construction, Manufacturing, and Education & Health Services**, which all added 1,000 or more jobs over the past year.

The only industry which didn't increase employment over the past year was the farm industry, which has remained stable at around 6,000 jobs for over a decade.

Industry Wages

Sonoma County's average weekly wage rose to **\$918 in Q3 2015**. This is a **4.7% increase from a year earlier, putting Sonoma County in the top 10% of counties nationwide for wage growth**.

Leisure & Hospitality has the lowest average weekly wage at \$413 per week, while manufacturing is the highest paid industry at \$1,276 per week.

Industry Output Trends

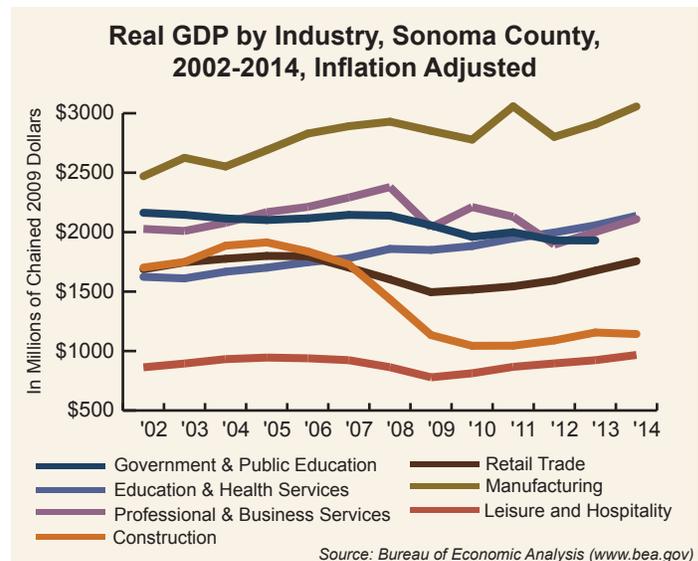
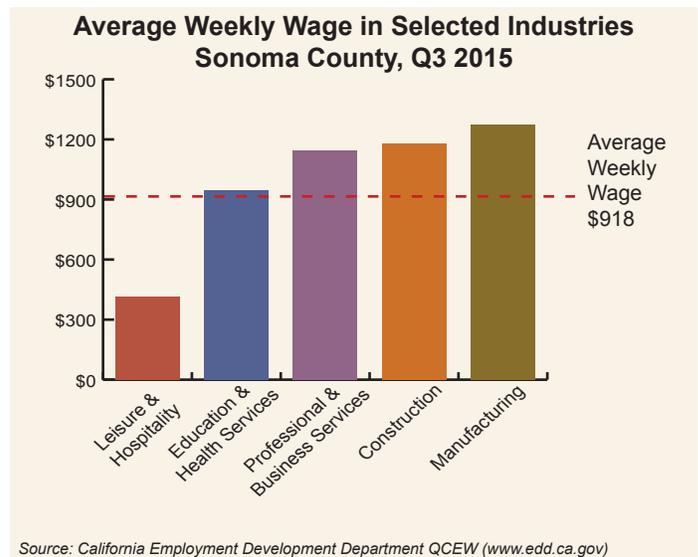
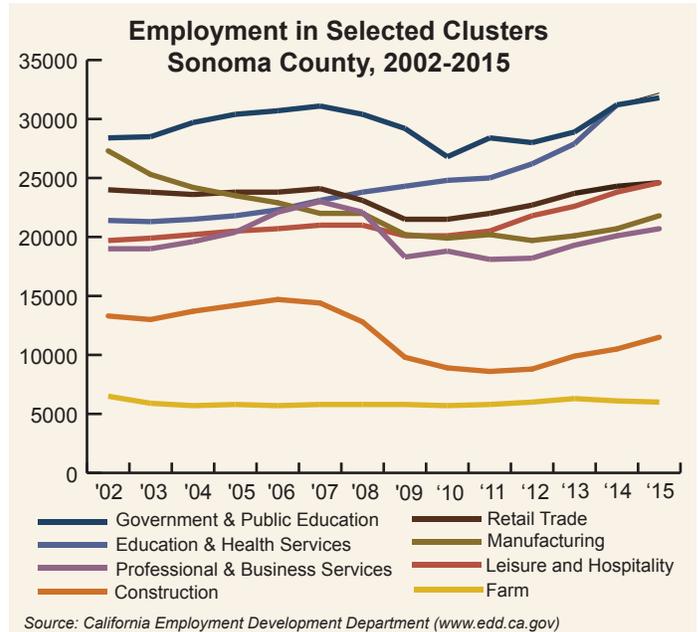
Most industries increased their output from 2013 to 2014, with Sonoma County's overall real GDP increasing **3.3% from 2013 to 2014**. (latest available figures)

While accounting for a relatively small percentage of output, The Information industry (not included in graph) increased the most between 2013 and 2014 with 6.5% growth, followed closely by Professional & Business Services (5.4%) and Manufacturing (5.1%).

Government had a slight decline in output, continuing a slight downward trend in recent years. Construction also saw a slight decline from 2013 to 2014. Overall, construction hasn't recovered from its dramatic decrease in output during the recession, and has remained relatively steady at \$1.1 billion in real GDP since 2009.

Major Private Employers, 2015	
Kaiser Permanente, Santa Rosa	2,640
Graton Resort & Casino, Rohnert Park	2,000
St. Joseph Health System, Santa Rosa	1,578
Keysight Technologies, Santa Rosa	1,300
Sutter Regional Hospital, Santa Rosa	963
Amy's Kitchen, Petaluma	870
Medtronic Cardio Vascular, Santa Rosa	840

Source: North Bay Business Journal, 2015 Book of Lists



Economy

Mobility

Airport Passengers

Air traffic resumed to and from Sonoma County in 2007 after a five-year interim period. **Alaska Air traffic at the STS Airport totaled 263,142 passengers in 2015, an increase of 10% from the year before.**

With Alaska Airlines flights to Los Angeles, San Diego, Orange County, Portland, and Seattle, the airport is a convenient hub to West Coast destinations for tourists and business travelers alike.

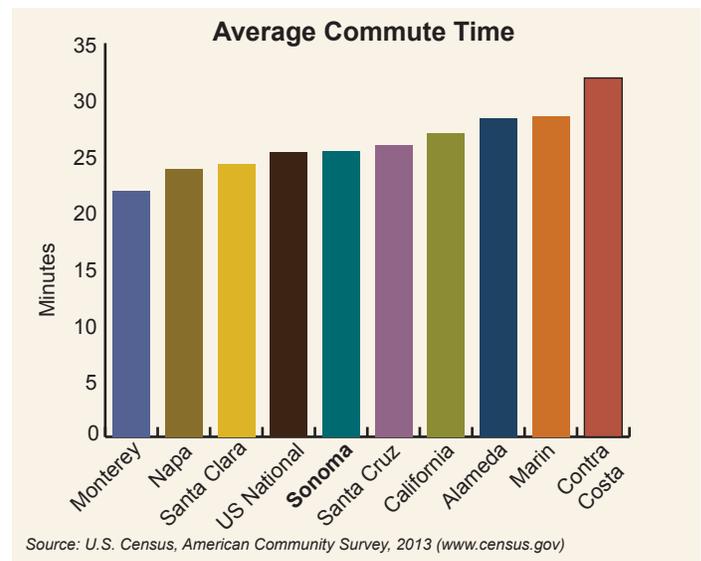
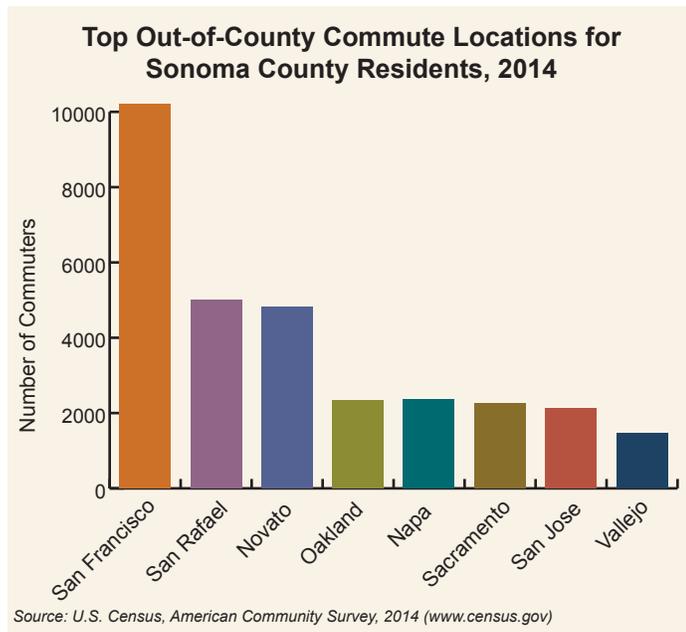
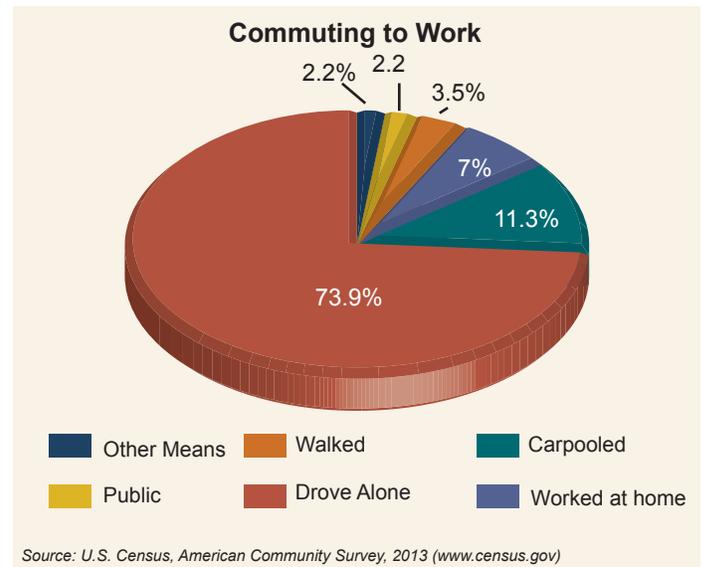
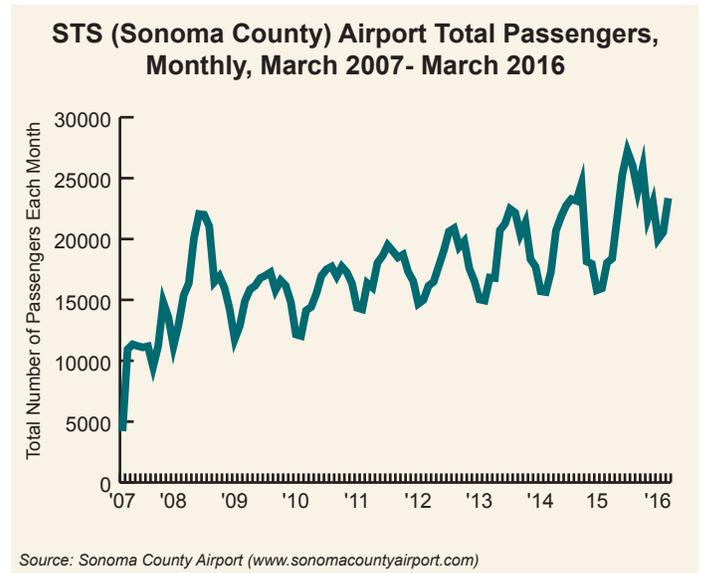
Allegiant Air will start flight routes from Sonoma County to Las Vegas and Phoenix in May 2016, allowing travelers to reach connecting flights to destinations in the Eastern US.

Commute Patterns

The latest available commute patterns indicate that 10,215 Sonoma County residents commute to San Francisco, followed by 5,011 to San Rafael and 4,821 to Novato.

In 2013, 73.9% of Sonoma County residents drove their vehicles alone to work. This has been decreasing incrementally, and moving to less carbon intensive commuting methods will be important to combat climate change because transportation accounts for a large share of Sonoma County's carbon emissions.

There promises to be a shift away from vehicle commuting as SMART Train passenger service begins in 2016 between the Airport station north of Santa Rosa, stretching south to San Rafael, with a connection to the ferry service to San Francisco. With the majority of Sonoma County's population living along the Highway 101 corridor, the SMART Train will be well-suited to transport many of the Sonoma County residents that travel outside the county for work.



Workforce Trends

Unemployment Rate

Sonoma County's unemployment rate continues to fall towards pre-recession levels and remains well below California's unemployment rate. An expanding local workforce and a steady decline in unemployment are positive signs of a sustainable economic recovery taking hold in Sonoma County. As the local economy moves into full employment, the 2015 annual unemployment rate fell to 4.5% from 5.6% in 2014, placing Sonoma County 5th amongst counties in California for lowest unemployment rate. In September 2015, the unemployment rate marked an 8 year low of 4.0%, 1.1% lower than the previous year.

Labor force continued to grow to 260,300 in 2015, an increase of 2,700 to the labor force albeit at a slightly slower pace than in 2013 and 2014. Furthermore, 5,500 jobs were added to the local economy, a substantial gain although fewer than in 2013 and 2014. **Sonoma County's growing labor force, job addition, and low unemployment rate, are reassuring signs of overall economic vitality and a strong, healthy labor market.**

Full-time and Part-time Employment

Five year estimates reveal a similar full-time worker representation of the population in both the state and Sonoma County, at 53% and 52% respectively. 25% of the local population worked part-time while 23% did not work. In comparison, 19% of California's population worked part-time and 29% did not work.

Work Location

A large proportion of Sonoma County's workforce works locally. 83.4% of Sonoma County's workforce worked locally in Sonoma County in 2014 while 16.6% worked outside of Sonoma County. This is a slight increase from 83.2% working in Sonoma County in 2013.

Workforce Demographics

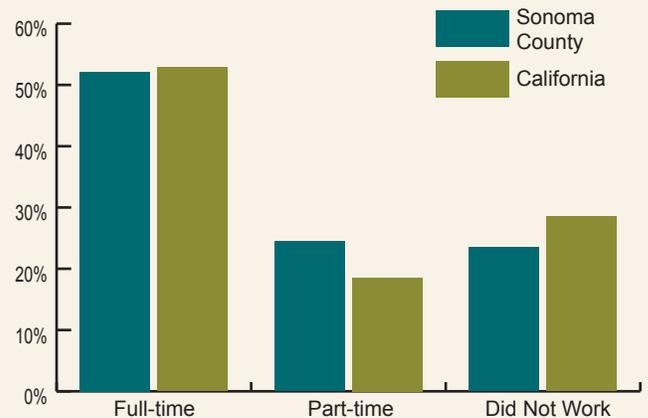
The senior population is the largest growing segment of the local population, with 22% of Sonoma County's population now 60 years and over. Statewide, 17% of the population are 60 years and over while 71% are not in the labor force and only 26% remain employed. With a comparatively large representation of 60 years and over in Sonoma County's population, 68% are not in the labor force, 30% still remain employed, and only 2% are unemployed, an impressive labor force participation rate beyond State levels. Sonoma County's dominant senior population will continue to require increasing attention towards building on an infrastructure that provides the necessary support to service the older community.

Unemployment Rate, Sonoma County, 2015



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

Work History, 2014



Note: full-time employment is defined as 35+ hours/week and anything less is defined as part-time employment
Source: U.S. Census Bureau, American Community Survey (www.census.gov)

Work Location, 2014

	2013	2014
Worked in Sonoma County	83.2%	83.4%
Worked outside Sonoma County	16.8%	16.6%

Source: U.S. Census Bureau, American Community Survey (www.census.gov)

Workforce

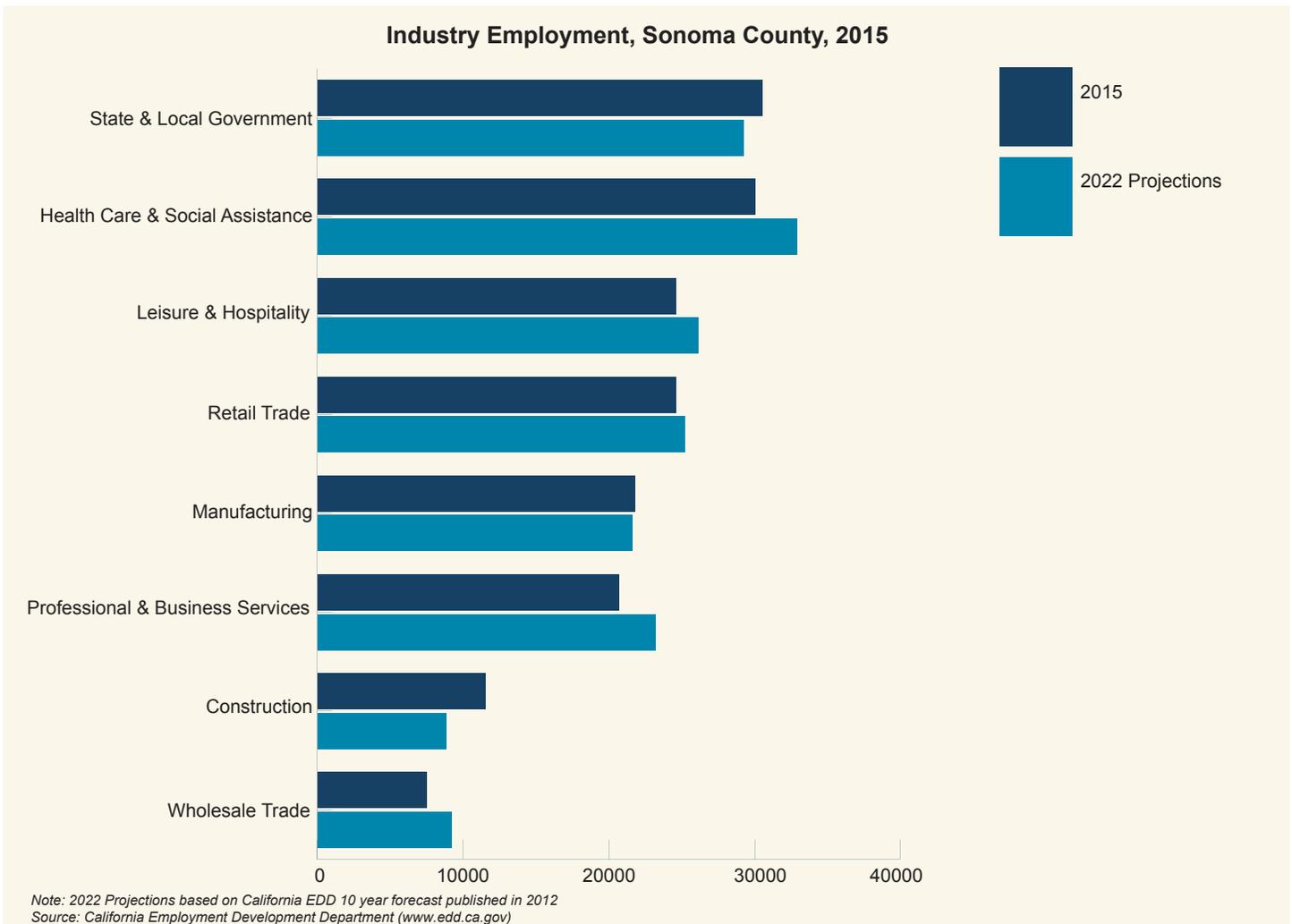
Industry Trends

Industry Employment

Local job growth has gained momentum in the past few years and grew at 2.3% in 2015, outpacing statewide and nationwide job growth. State & Local Government jobs employ 30,500 workers and make up 12.3% of local employment. Similarly, Health Care & Social Assistance accounted for 12.1% of local employment and has been critical to job creation in the economy. Health Care & Social Assistance reached 30,000 jobs in 2015 – far exceeding employment levels of 23,800 in 2007. That’s equivalent to a 26% growth from 2007 and is the largest employment growth since the recession amongst all industries. In the past year, Health Care & Social Assistance added 800 jobs, and is projected to be the prevailing industry employing 32,900 workers in 2022.

Leisure & Hospitality also added 800 jobs in 2015 to reach a total of 24,600 jobs, reflecting a vibrant tourism sector, and over the past decade has been one of Sonoma County’s fastest growing industries. In 2015, Retail Trade and Manufacturing comprised 9.9% and 8.8% of total jobs respectively, and Professional & Business Services has rebounded from its large decline during the recession. Amongst a supply-constrained Bay Area landscape, Sonoma County has presented bright opportunities for the Construction industry, adding jobs at a faster pace than California and the U.S. economy since 2012. Employment grew a tremendous 9.5%, **making Construction the fastest growing industry in 2015 with an addition of 1000 jobs**. The Construction industry registered an 81% increase in online job postings in the 2015 year according to CEB TalentNeuron™ – a further testament to the role this industry plays. The Arts, Entertainment, and Recreation industry, and the Health Care & Social Assistance industry saw job posting growth of 74% and 62% respectively in 2015. **The industry employment breakdown illustrates a reliable and diverse representation of local industries driving the local economy.**

The chart below provides a comparison between 2015 actual employment levels and California EDD’s 10-year employment projections for 2012-2022. This comparison shows that Construction industry employment in 2015 has surpassed the EDD’s 2022 projections, along with State & Local Government and Manufacturing. Based on current job growth rates, most other industries are also on track to surpass these projections before 2022.

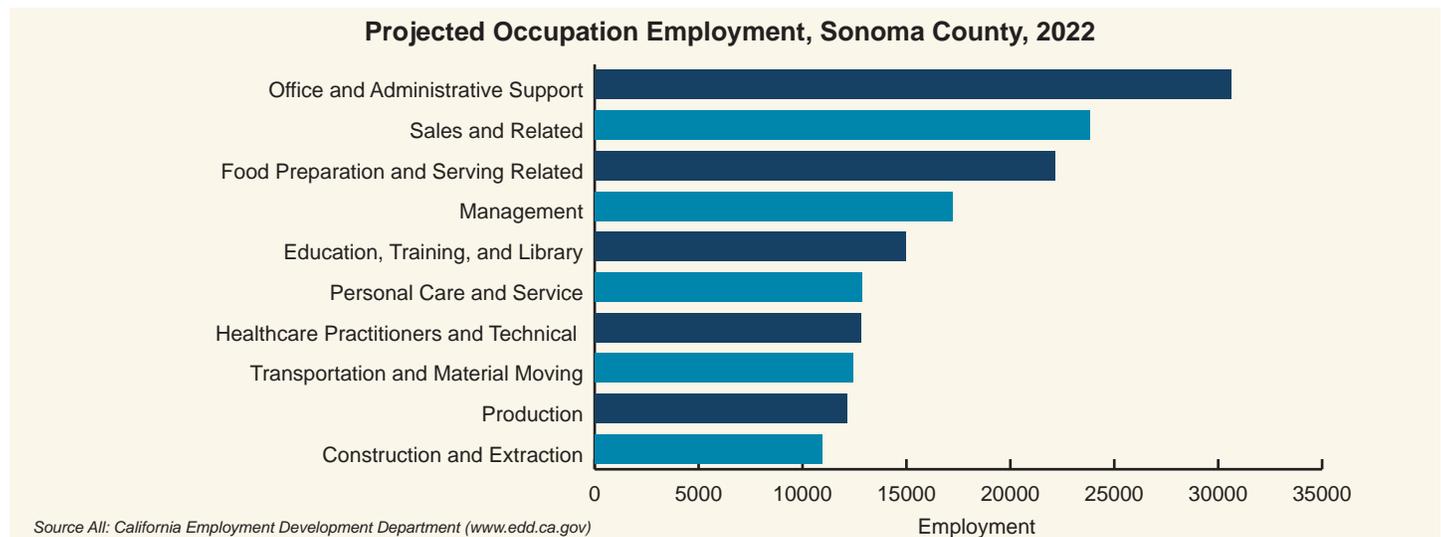
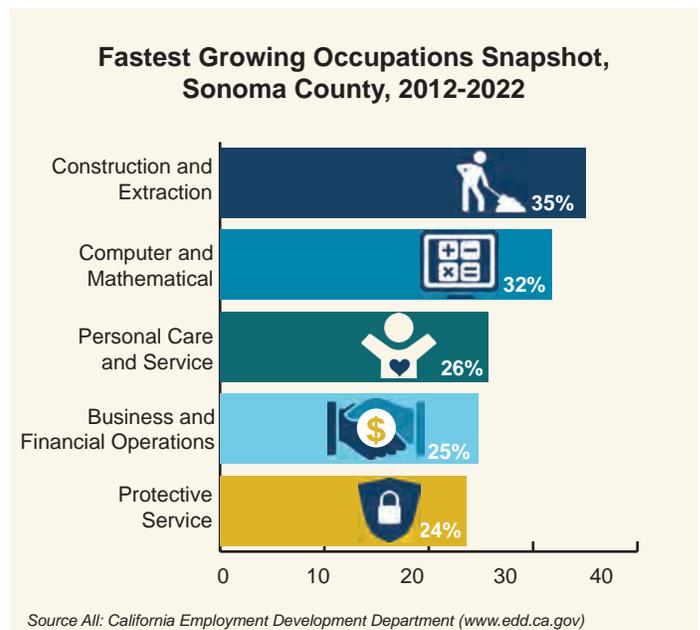
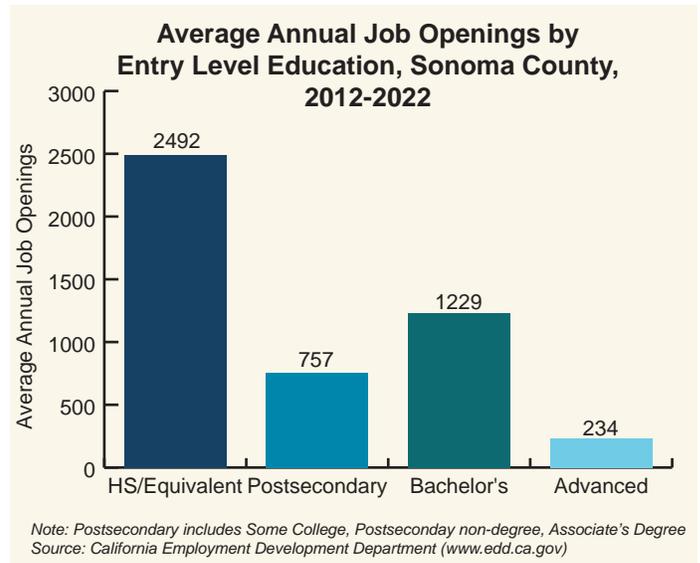


Occupational Trends

Office and Administrative Support, Sales and Related, Food Preparation and Serving, Management, and Education, Training, and Library occupations, are projected to be major contributors to local employment. Of these occupational groups, Retail Sales jobs, Food and Beverage Serving jobs, Construction Trades jobs, Other Personal Care and Service jobs, Other Management jobs, Health Diagnosing and Treating Practitioner jobs, and Cooks and Food Preparation jobs are estimated to employ the most workers in 2022.

Projected job openings for Sonoma County show a high need for those with a postsecondary education. On average, occupations requiring an Associate’s degree, Bachelor’s degree, or a Master’s degree at entry level grow significantly faster than those that do not. The vast majority of jobs in Sonoma County require at least a High School Diploma or Equivalent and 28% of jobs seek postsecondary education at entry level, illustrating the need for highly educated candidates to hold these positions. Each year, the number of job openings for those with a High School Diploma/Equivalent and above will be around 4,712, and for those with Postsecondary education and above 2,220. In addition to education requirements, jobs in Sonoma County often involve extensive on the job training.

Moreover, data from WANTED Analytics shows employers looked for a number of Hard Skills in 2015, including Bilingualism, Behavioral Health, Food Preparation, Quality Assurance/-Control, Technical Support, Customer Relationship Management, Geriatrics, Preventive Maintenance Inspections, and Pediatrics. The data also reveals that the most sought after Certifications were Driver’s License, CRN, BLS, CPR, First Aid, Commercial Driver’s License, Advanced Cardiac Life Support, HAZMAT, OSHA, and Food Safety Programs. **Demand for higher education, hard skills, and certifications places pressure on cultivating a qualified workforce ready to tackle the jobs of tomorrow, and attests to the emergence of a sturdy, highly-skilled, prosperous local economy.**



Workforce

Earning Trends

Median Earnings

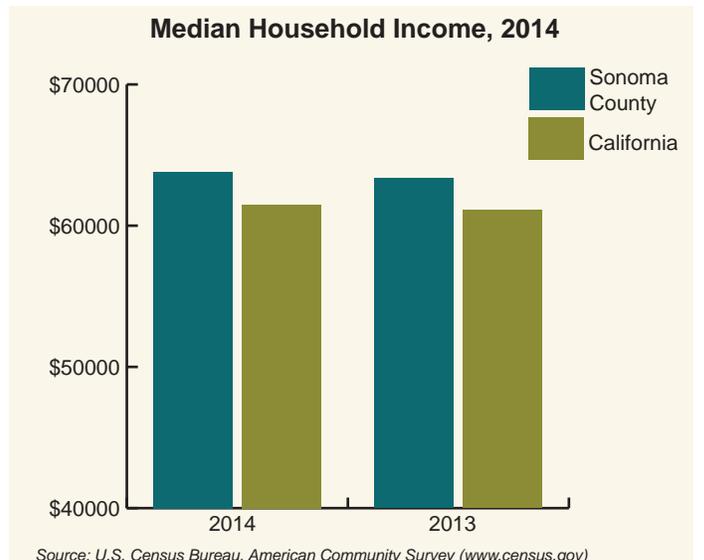
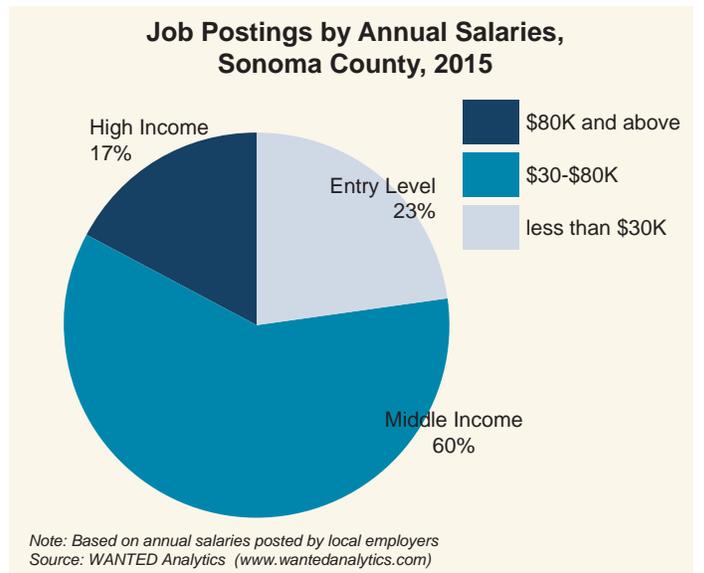
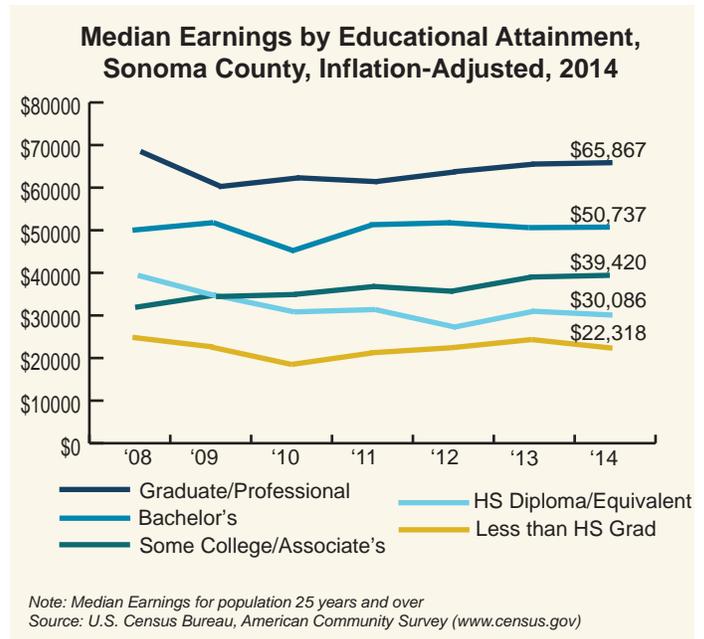
College graduates saw modest increases in median earnings for 2014 while median earnings for Less than High School and High School Graduates/Equivalent continue on a slight downward trend. Median earnings for Graduate/Professional Degree holders were recorded at \$65,867, returning to pre-recession levels and exceeding 2007 median earnings of \$61,579. As expected, higher education results in higher median earnings, with local college graduates making 69% more on average than a typical High School graduate.

Salaries and Wages

Online job posting data from WANTED Analytics shows phenomenal growth in hiring demand for middle income jobs in the past year with 60% of job postings falling in the \$30K - \$80K annual salaries bracket. The percentage of jobs paying less than \$30K have meanwhile contracted to 23% in 2015, attributing to the gain in high and middle income jobs. Furthermore, California EDD anticipates the bulk of projected employment to be in middle income jobs paying \$30K - \$80K annually, with high wage occupations growing faster on average than low wage occupations. Sonoma County has demonstrated remarkable wage growth, with a reported \$952 average weekly wage in 2014 which grew by 4.2% from 2013, outpacing California (2.9%) and the U.S. (3.5%), but still lags behind the calculated \$1209 and \$1035 average weekly wage for California and the U.S. respectively.

Median Household Income

Sonoma County recorded a median household income of \$63,799 in 2014, more than \$2,000 above California's median household income (\$61,489), and more than \$10,000 above the U.S. median household income (\$53,482). The 2014 median household income in Sonoma County also increased by \$443 more over the prior year than in California and the U.S. The data further shows that the majority of the 2014 household income in Sonoma County, 42.6%, was held by the 45 to 64 years old age group, followed by the 25 to 44 years old age group which held 29.1%. Though 25% of households fell in the \$60,000 - \$99,999 median income bracket, indicative of Sonoma County's existing wealthy community, households displayed a considerably balanced income distribution and an improving distribution amongst different races.



Destination Spending

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.

Growth of Destination Spending

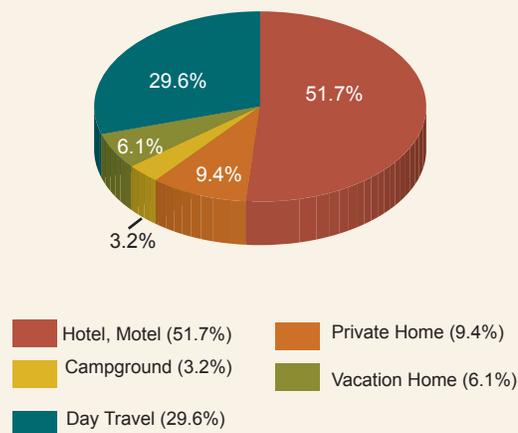
Sonoma County had the fourth-largest destination travel spending among comparable counties in 2015. The value of destination spending in Sonoma County in 2015 was \$1.82 billion. This is an 11% increase in total destination spending from 2014. This increase in spending reflects Sonoma County's popularity as a tourist destination and that the tourism sector of the economy is returning to prerecession levels. All of the comparable destinations also experienced an increase in destination spending.

The decrease in unemployment, improved air service to Sonoma County, lower oil prices, and the increase in international tourism will continue to strengthen the tourism industry in Sonoma County as the economy improves. These factors, as well as the proximity to the Bay Area, help maintain tourist flow and destination spending strength.

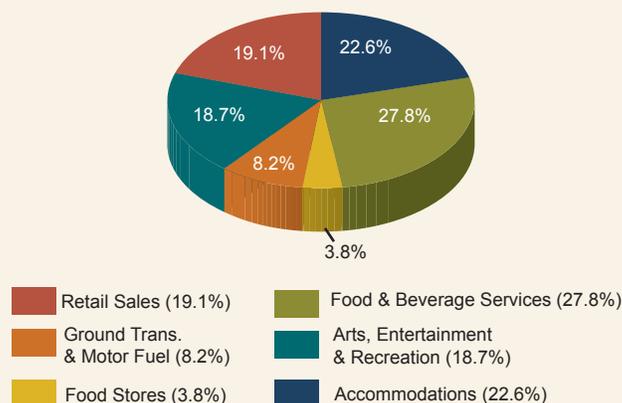
Local Impact

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 \$1.82 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.

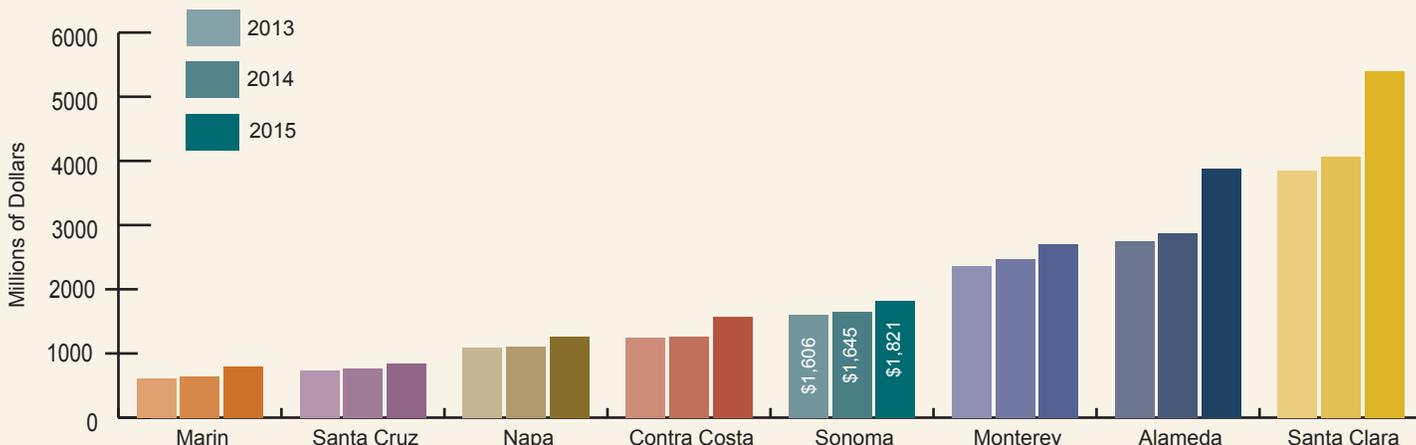
Distribution of Visitor Spending By Type of Traveler Accommodation, Sonoma County, 2015



Distribution of Visitor Spending by Commodity Purchased, Sonoma County, 2015



Destination Spending by County, 2013-2015 (Millions of Dollars)



Source All: California Travel Impacts by County, 2015. Prepared for the California Travel and Tourism Commission by Dean Runyan and Associates, May 2016

Tourism

Industry Employment

Tourism Workforce

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.

Tourism employment accounted for nearly 6.7% of total employment in Sonoma County in 2015. This is equal to 19,710 jobs in the county.

Increased discretionary spending has aided recovery of the workforce. The change from 2014 to 2015 in the number of tourism jobs in the county was 2%. This indicates that Sonoma County gained 400 tourism sector jobs from 2014 to 2015. The high growth rates in industry employment across comparable counties indicates the impact of the recovering economy on tourism activities.

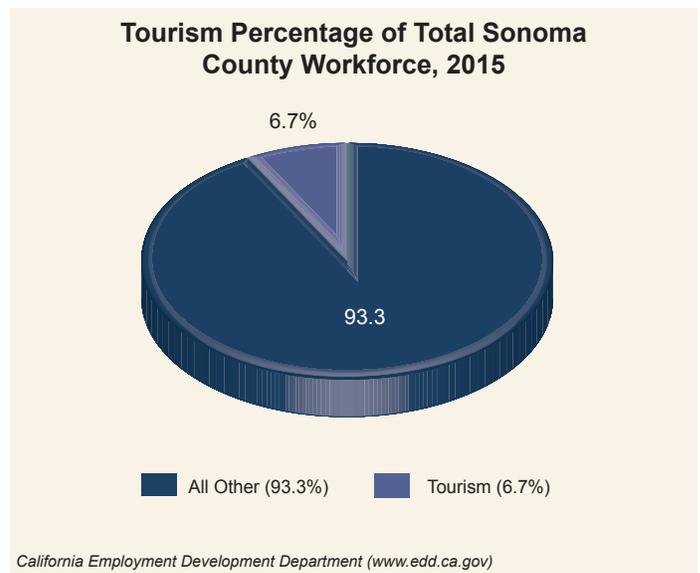
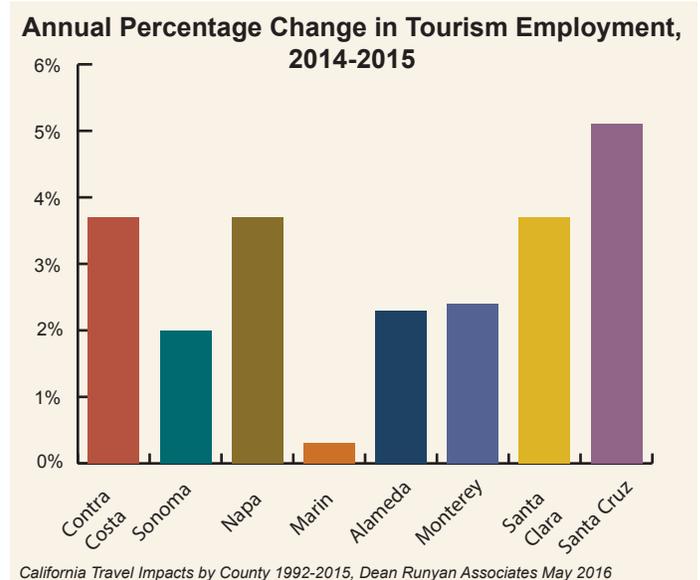
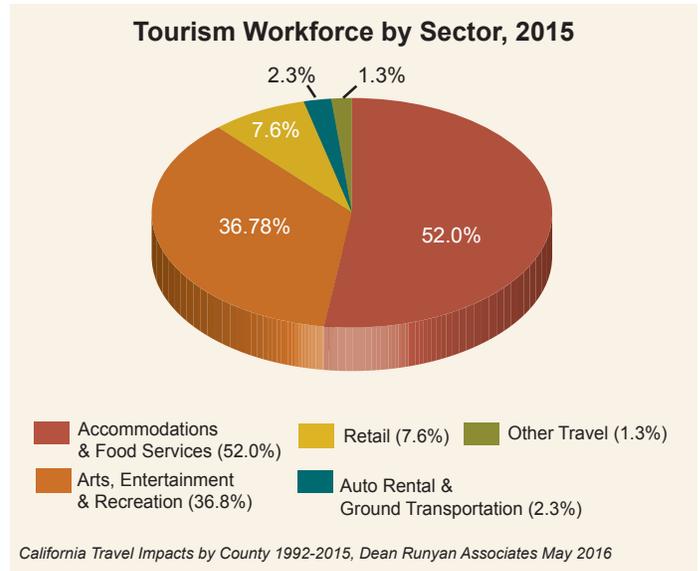
The majority of tourism jobs are found in the accommodations and food service sector (52%), followed immediately by jobs in the arts, entertainment and recreation sector (37%).

Local Impact

The \$1.82 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 supported 19,710 jobs in Sonoma County in 2015.

For More Information
California Travel and Tourism Commission (www.VisitCalifornia.com)
Sonoma County Tourism (www.SonomaCounty.com)
Sonoma County Economic Development Board (www.SonomaEDB.org)



Lodging Industry Performance

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.

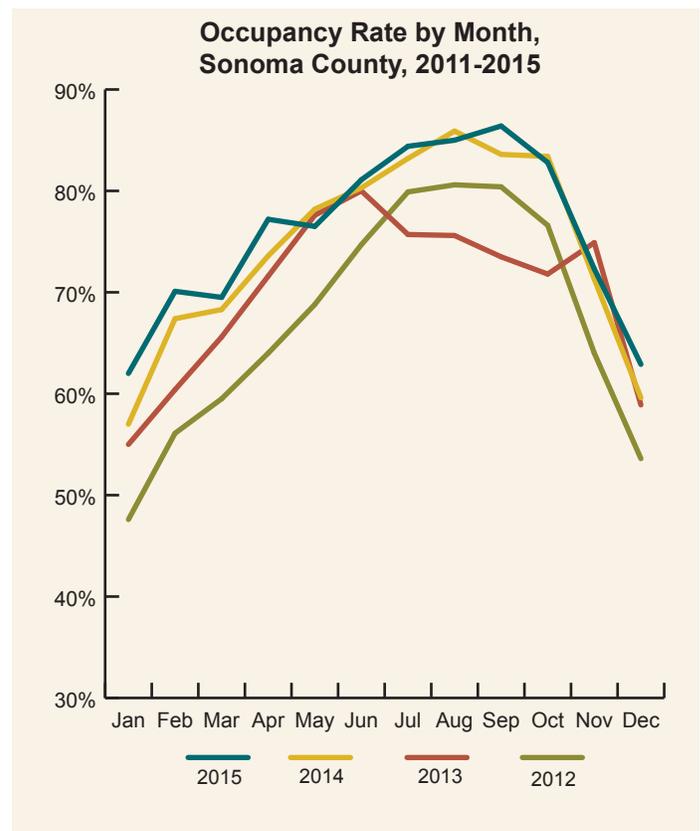
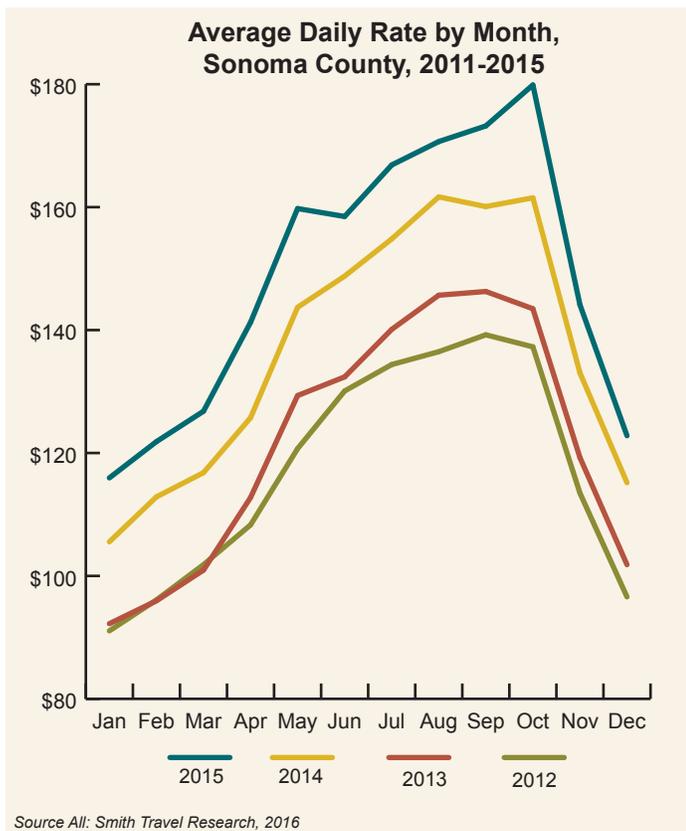
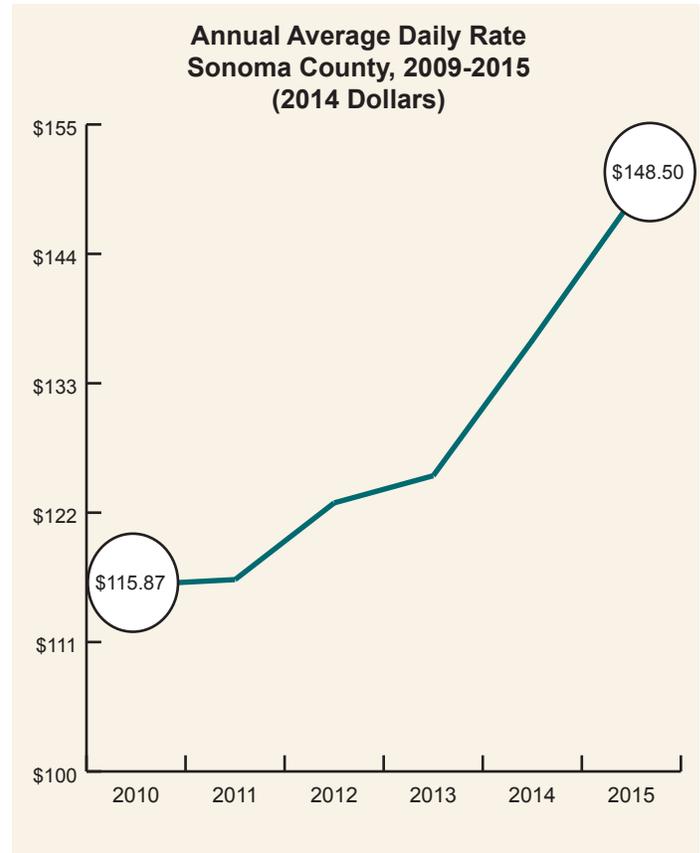
Average Daily Rate and Occupancy

The average daily rate (ADR) grew in 2015 to \$148.50 (2015 dollars), an 8.68% increase from 2014. Comparable counties in California have experienced a similar increase in the average daily rate from 2014 to 2015. Early 2016 data suggests that ADR continues to increase.

At 75.9%, average occupancy for 2015, occupancy rates in Sonoma County increased 2.15% in 2015 from 2014. Preliminary results for 2016 suggest that the Sonoma County's lodging industry is returning to, and surpassing levels seen prior to the 2007-2008 recession as average daily rate and occupancy rates continue to increase.

Local Impact

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, 2016

Tourism

Tourism-Related Taxes

State and Local Tax Revenue

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.

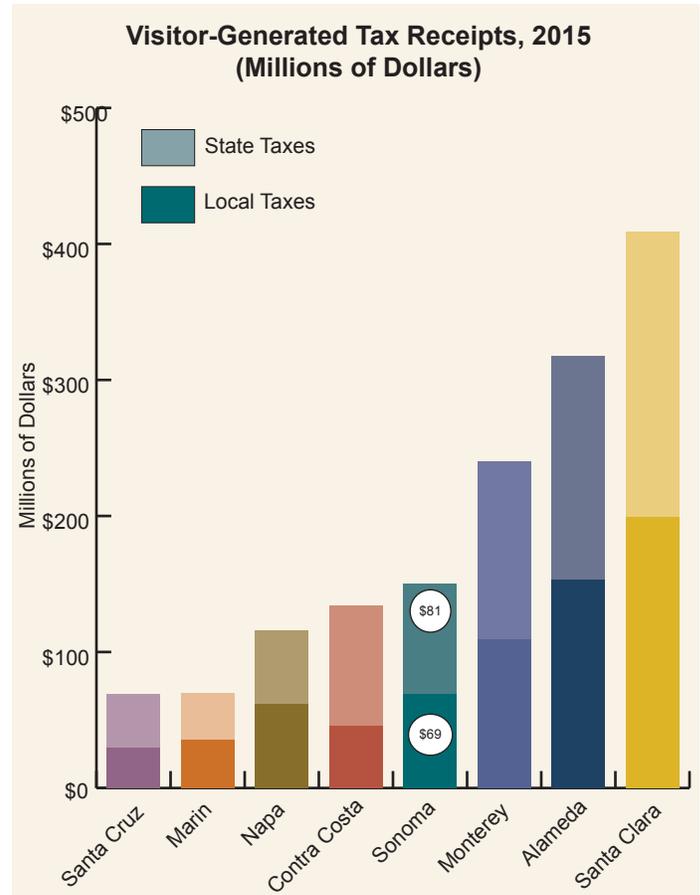
State and Local Effect

Between fiscal years 2003 and 2015, total TOT collected grew 132% percent from \$13.5 million to \$31 million. TOT revenues peaked in 2007 and all comparable counties experienced a decrease in TOT revenues with the economic downturn. With the recession further behind us, TOT revenues for Sonoma County in 2015 are the highest they have ever been.

Total visitor generated local taxes, including TOT, in 2015 were an estimated \$69 million. Visitor-generated tax receipts create a source of revenue for the state, contributing approximately \$81 million in 2015. Together, state and local taxes generated by visitors totaled \$150 million in 2015. Sonoma County is ranked fourth in comparable counties for visitor generated tax receipts.

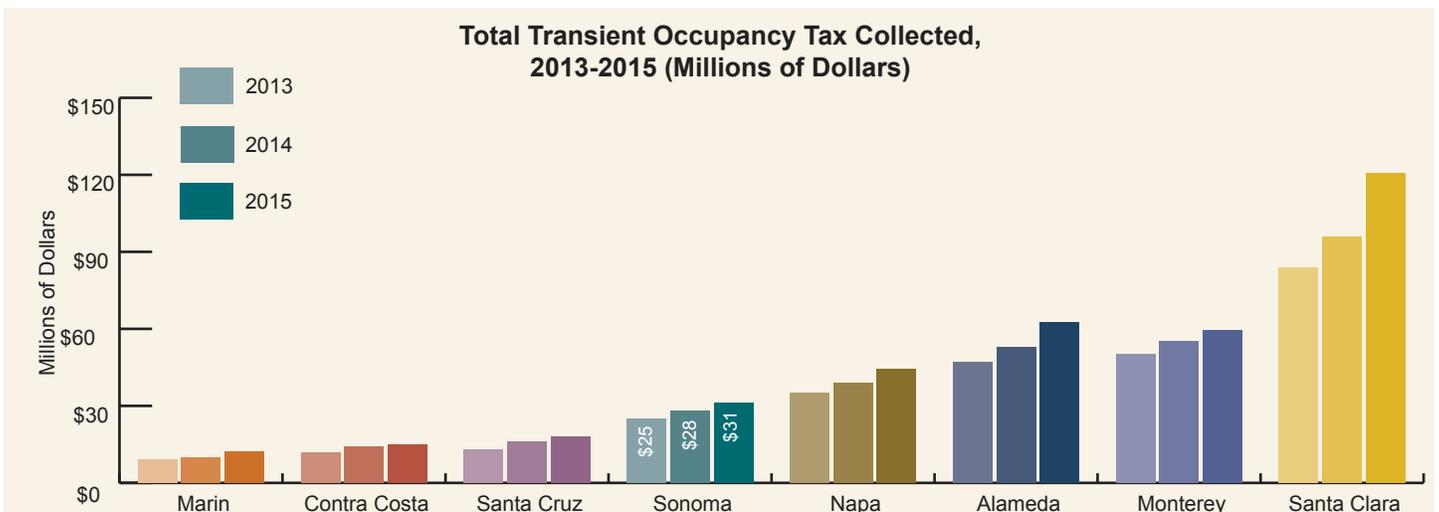
Significance

Tourism is a significant source of tax revenue for local governments, with visitor-generated tax revenue currently making up over 22% of total local tax receipts. The County government allocates a significant portion of this revenue to finance advertising and promotional activities.



For More Information

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



Source All: California Travel Impacts by County, 2015. Prepared for the California Travel and Tourism Commission by Dean Runyan and Associates, May 2016

Industry Earnings

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.**

Total industry earnings by travel spending in 2015 were \$588 million. This is a 6.3% increase from 2014. All comparable destinations experienced increases in industry earnings. Although Sonoma County ranks fourth out of comparable counties, the overall increases in industry earnings reflects the recovery of the tourism industry since the 2008 economic downturn.

Industry earnings generated by tourism spending increased 6% from 2014 (unadjusted for inflation) for Sonoma County. This increase off-sets the lower ranking when compared to other counties in earnings per tourism related job. 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 2014 to 2015. These increases show that tourism spending is continuing to grow in Sonoma County.

Impact on Sonoma County

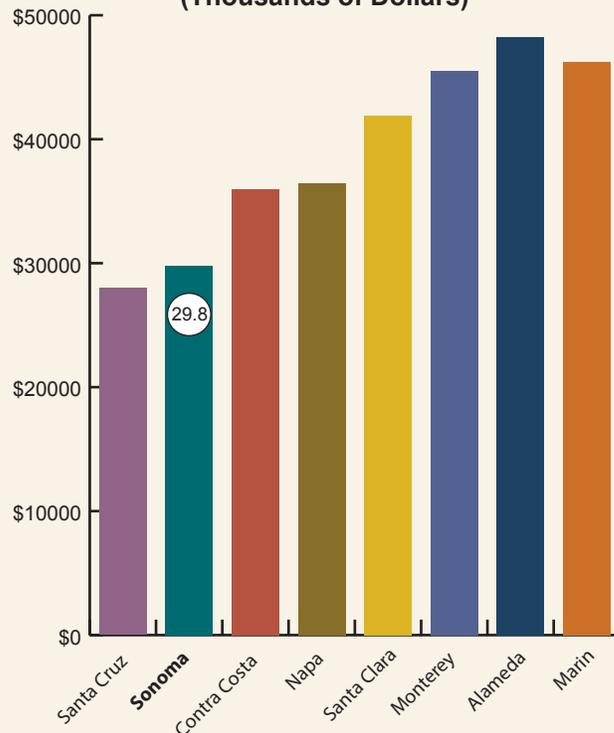
Visitors traveling to Sonoma County generate revenue and jobs in local tourism related businesses through destination spending. **This revenue spills over to improve the overall economy.** Substantial growth in high-revenue and in previously underperforming industries are promising long-term indicators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

Sector Earnings Generated by Travel Spending, Sonoma County, 2014-2015 (Millions of Dollars)

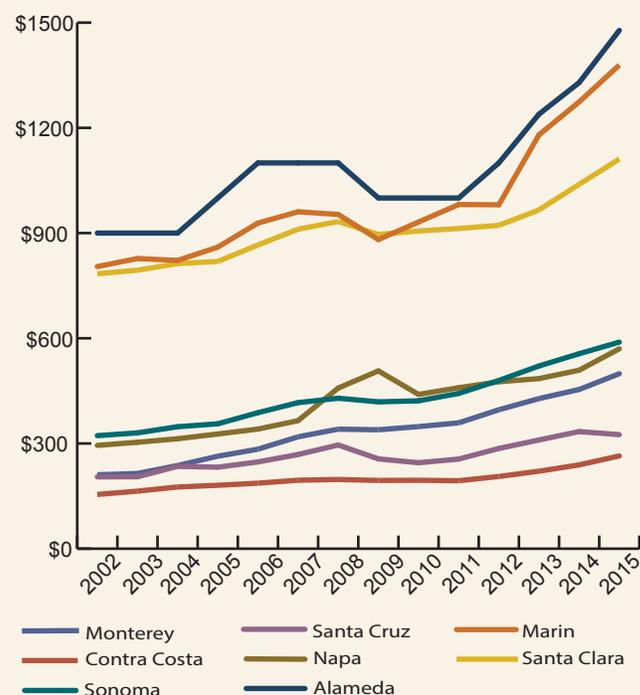
Industry	2014	2015	% Change
Accommodations & Food	\$317	\$334	5%
Arts, Entertainment & Recreation	\$157	\$169	8%
Retail*	\$50	\$51	2%
Auto Rental	\$17	\$18	6%
Other Travel**	\$12	\$16	33%
Total	\$553	\$588	6%

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

Industry Earnings per Tourism-Related Job by County, 2014 (Thousands of Dollars)



Total Industry Earnings Generated by Travel Spending, 2002-2014, (Millions of Dollars)



Source All: California Travel Impacts by County, 2015. Dean Runyan and Associates, May 2016

Society

Education

Students per Teacher Ratio

Sonoma County maintains an admirable ratio of **19.6 students per teacher or full-time equivalent**, second lowest among comparable counties. This low student per teacher ratio results in smaller class sizes, more one-on-one student/teacher interactions and a higher quality of education for Sonoma County students.

CAASPP Test Results

The California Assessment of Student Performance and Progress is a new student assessment system in California, replacing the older standardized testing and reporting system.

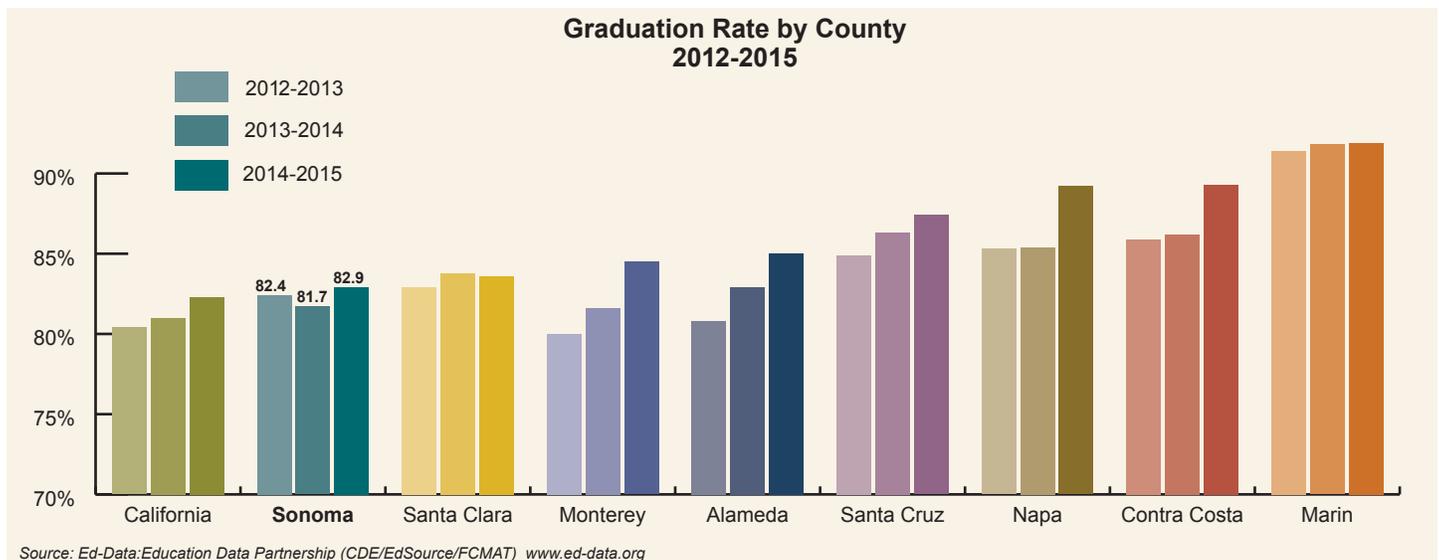
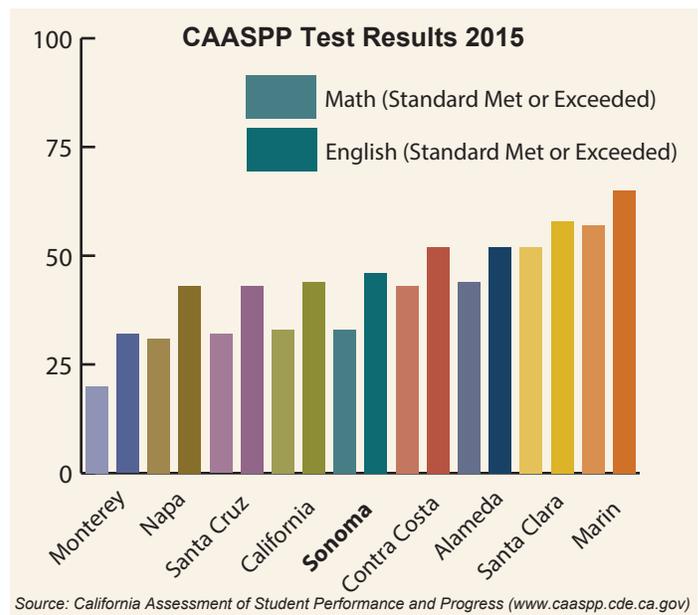
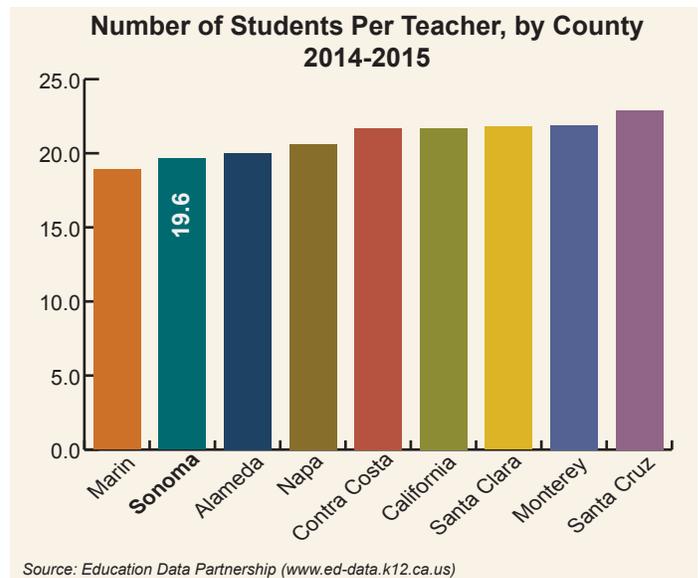
33% of Sonoma County students met or exceeded the standard for Math, which was on par with the California average and in the middle range of comparable counties.

46% of Sonoma County students met or exceeded the standard for English, which ranked above the California average of 44%, and in the middle range for comparable counties.

Graduation Rate

High school graduation rates are an important indicator of the value of education to Sonoma County youth and their families. **Sonoma County's graduation rate increased to a new high in the 2014-15 academic year to 82.9%**. Sonoma County's graduation rate of 82.9% is slightly higher than the California graduation rate of 82.3%.

It will be important to track further changes in the high school graduation rate in coming years because high school graduation rates have been shown to be an important key to future economic success.



Education

Undergraduate Majors

The relative predominance of certain fields of study for post-secondary education of Sonoma County residents can be indicative of the qualifications of the county's workforce.

Nearly 40% of residents received bachelor's degrees in "science and engineering" followed by "arts and humanities" at about 30%.

The top majors at Sonoma State University are: Business, Psychology, Sociology, Liberal Studies, and Communications - in descending order.

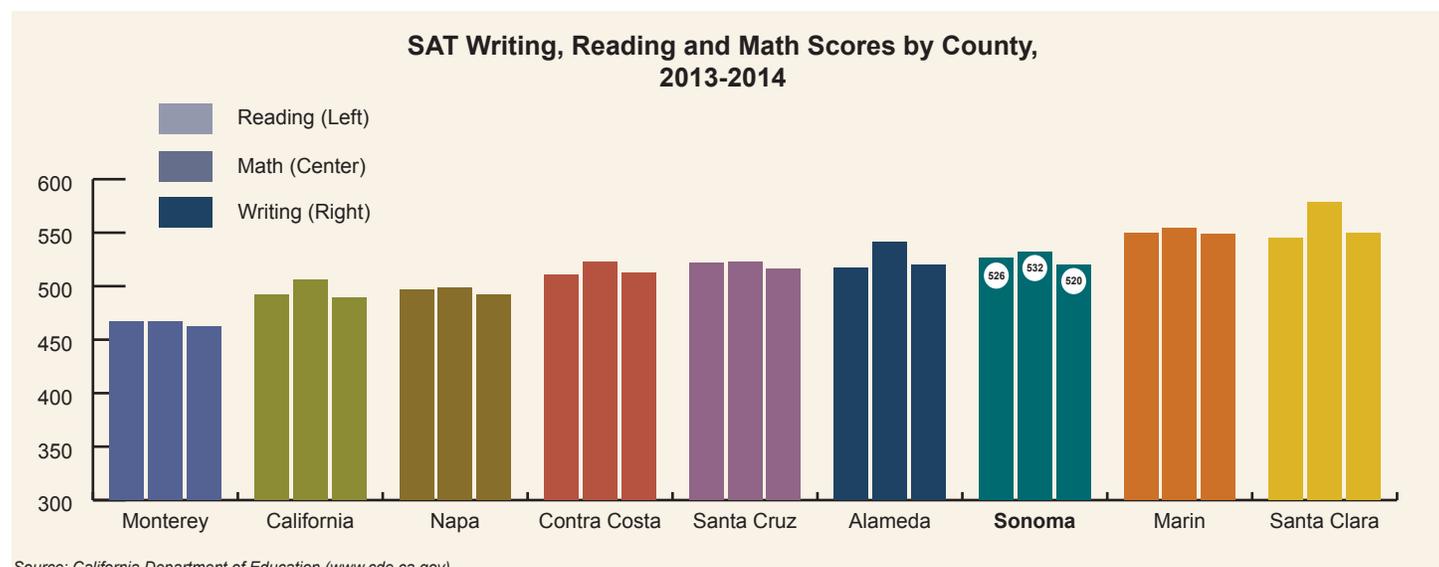
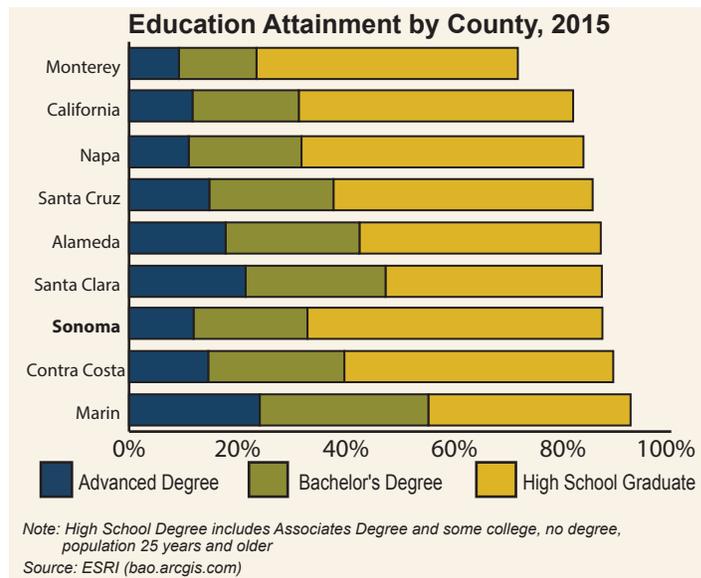
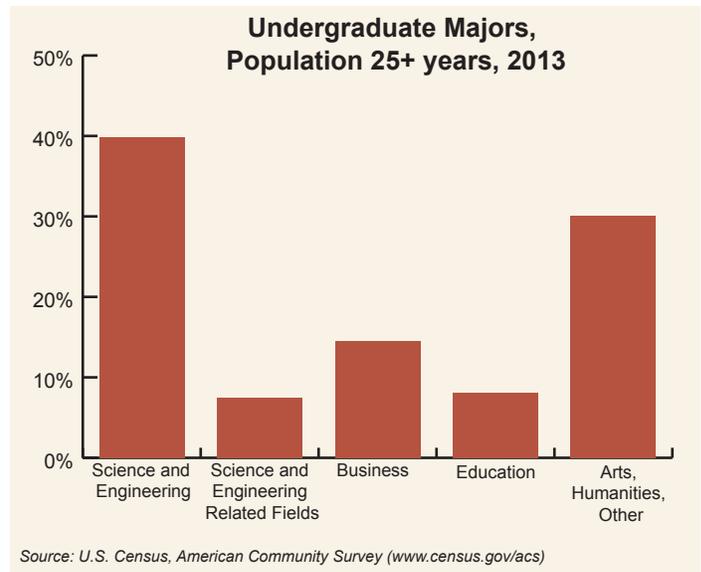
Educational Attainment

Educational attainment is an important factor to determine an individual's future success. **Sonoma County ranks highly on the percentage of the population 25+ years old that have attained a High School Diploma or higher among comparable counties.** However, the graph to the right displays that Sonoma County is lacking in residents with an Advanced Degree when compared to other counties.

SAT Scores

The SAT is a key factor in college acceptance. High SAT scores are one key measure of an individual's likelihood of getting accepted into a good college, and thus, influence potential future earnings.

Sonoma County students rank among the top half of comparable counties with an average SAT score of 1578, and well above the California average of 1487. In 2013-2014, Sonoma County students scored 526 in Reading, 532 in Math, and 520 in Writing. While these scores are lower than the 2012-13 academic year, Sonoma County remains competitive among comparable counties and California.



Society

Demographics

Current and Projected Age Distribution

According to current and projected age distribution data, the majority of the population was above the age of 45 in 2015. Conversely, about 25 percent of the population was below 25 years of age.

By 2020, Sonoma County is projected to undergo a moderate demographic shift, with more people entering the age group of 65 and above.

These projections show a decrease in the number of working age residents and an increase in the number of retirees. This aging trend will force productivity increases and workforce training for Sonoma County to retain a competitive workforce in the future.

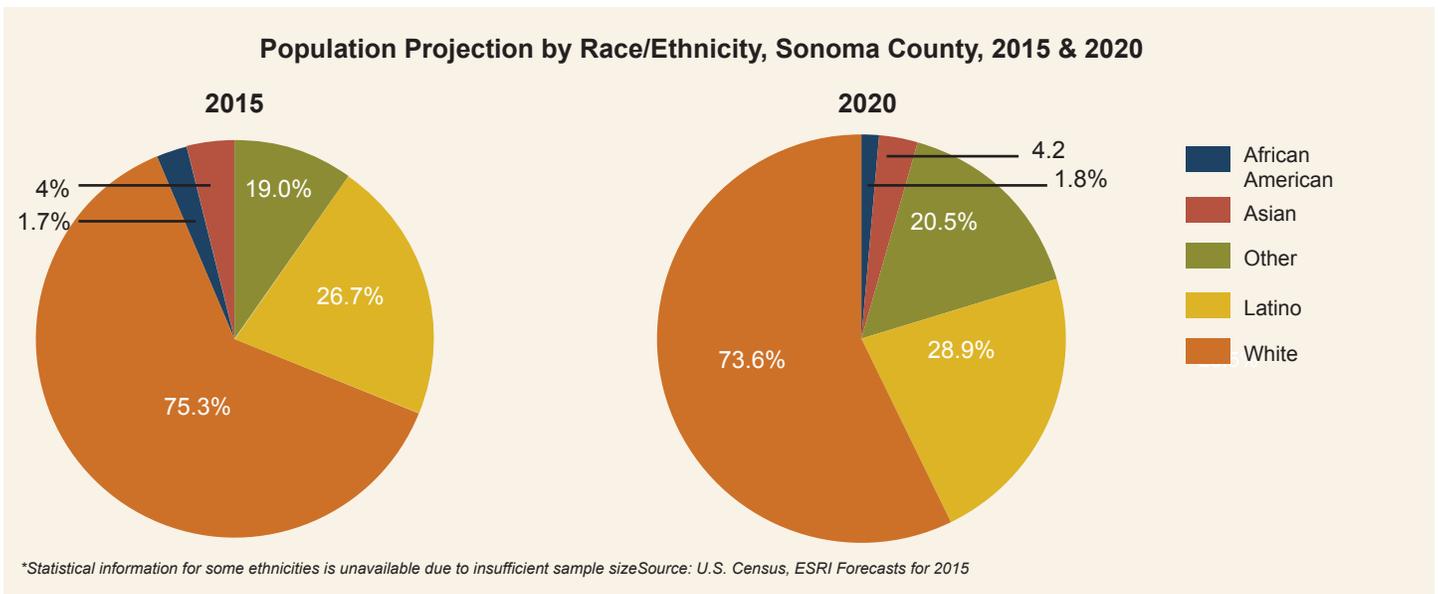
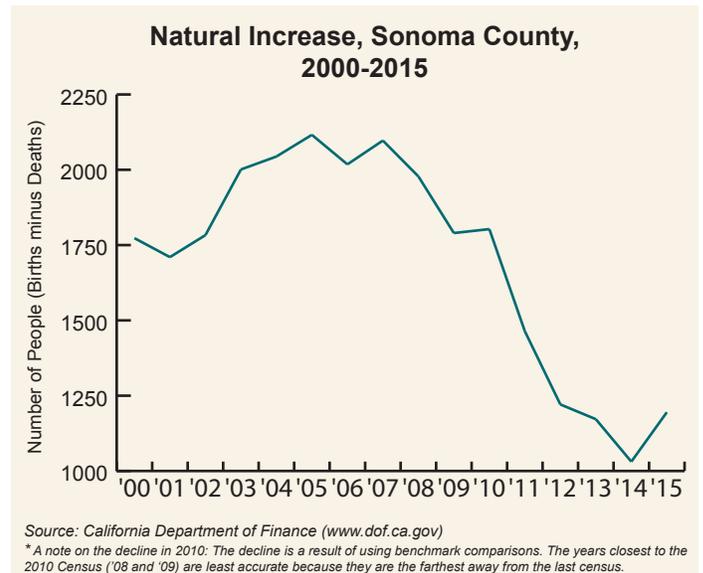
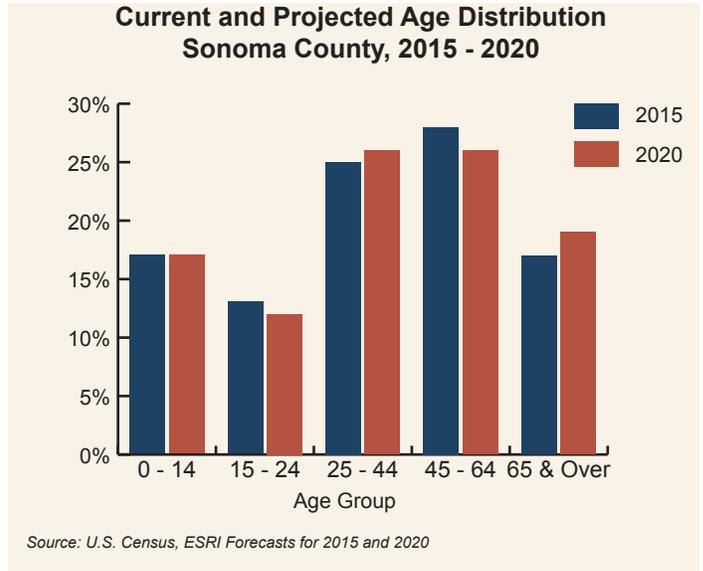
Natural Increase

The natural increase is calculated by the number of births minus number of deaths in a given year, and is an indicator of a region's population change due to demographic trends which removes migration.

Sonoma County's rate of natural increase has dropped dramatically over the past decade, but this trend was reversed recently and increased from 1031 more births than deaths in 2014 to 1195 in 2015.

Population Projection by Race/Ethnicity

The Hispanic population is estimated to increase slightly to 28.9% of Sonoma County's population by 2020. This corresponds with a slight decrease in the White population from 75.3% to 73.6% by 2020.



Crime and Safety

Crime Rate

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).

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. Sonoma County's crime rate has gradually declined since 2005, however in recent years has remained stable or increased slightly.

Crime Rates By County

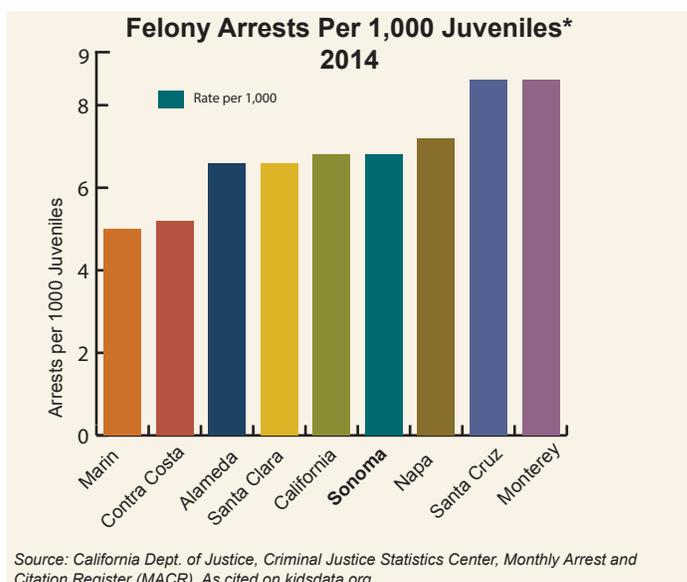
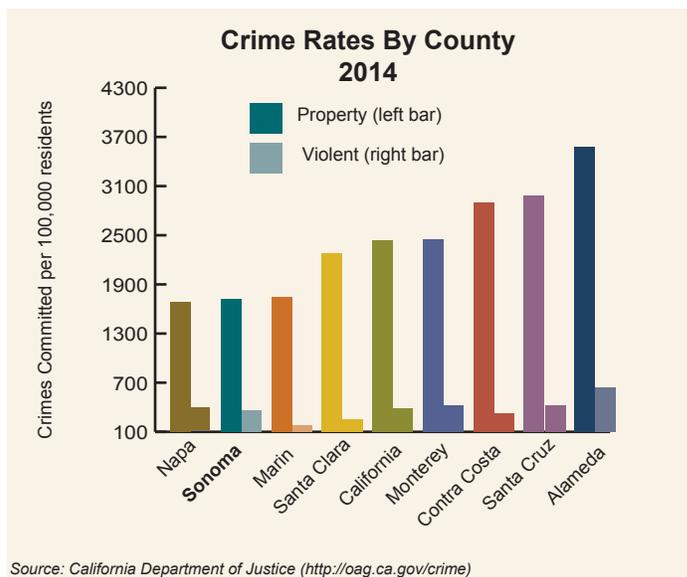
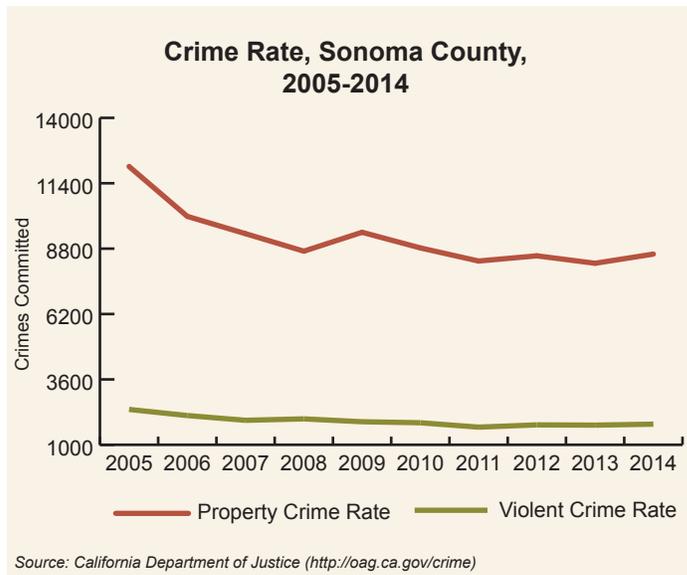
Among comparable counties, Sonoma County boasts the second lowest property crime rate, with only 1,716 property crimes per 100,000 residents in 2014. Sonoma County's violent crime rate ranks in the middle range of comparable counties. **Sonoma County's 364 violent crimes per 100,000 residents is below the state average of 390 violent crimes per 100,000 residents.**

In 2013, Sonoma County employed over 1,500 full time criminal justice personnel, down from over 1,600 criminal justice personnel in 2004. This decrease is due to budget cuts. **While the crime rate has been relatively stable since 2011, it will be important to monitor crime rate trends in coming years to determine if Sonoma County has an appropriate number of criminal justice personnel.**

Felony Arrests Per 1,000 Juveniles

For two years in a row, Sonoma County's juvenile felony arrest rates have been higher than the state average. Sonoma County, once ranked in the lower half of comparable counties, has now entered the top half.

The relatively high juvenile felony rates should be used as a catalyst to further promote education and provide more job and training opportunities to the youth of Sonoma County.



Society

Housing

Housing Affordability Index

Housing affordability is a major factor for many families looking to relocate to Sonoma County. The Housing Affordability Index states the percentage of households who can afford to purchase the median home price in a given region.

Sonoma County remained relatively more affordable than the San Francisco Bay Area from 2013 to 2015. **Through 2015 and into 2016, Sonoma County became less affordable and on par with the San Francisco Bay Area with only 26% of households being able to afford the median home price.**

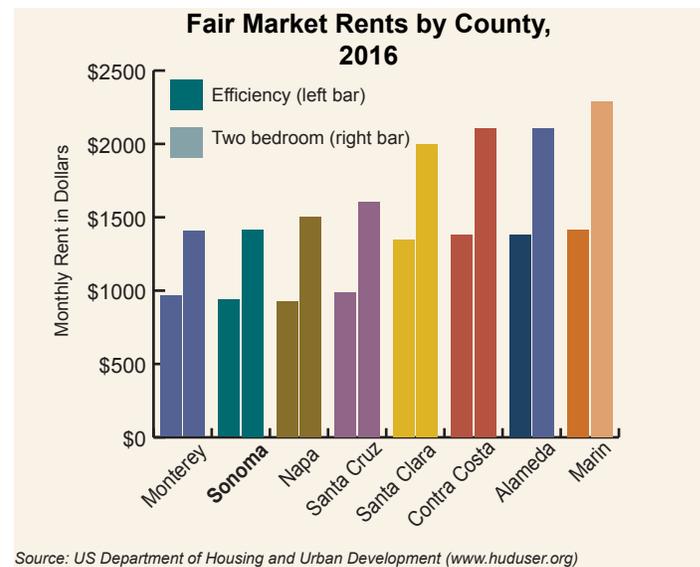
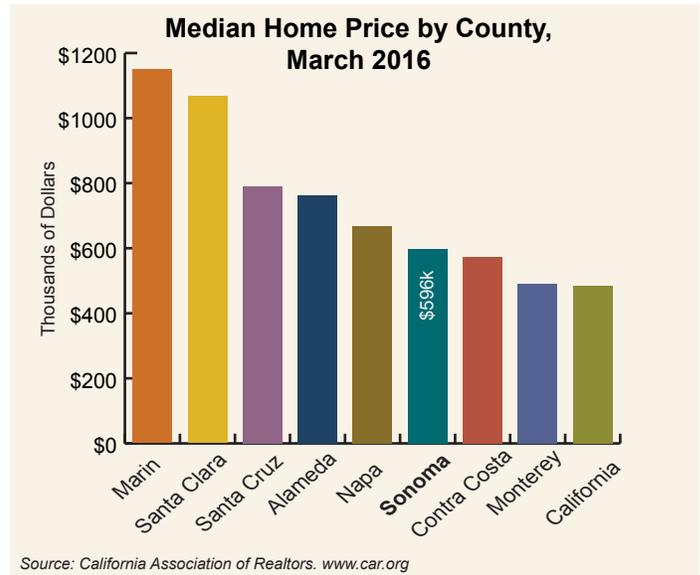
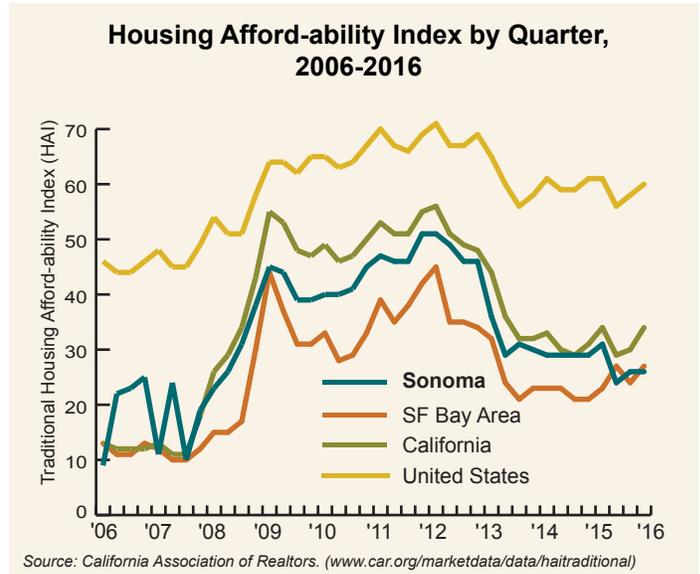
Median Home Price by County

Currently, Sonoma County's median home price places it among the more affordable of comparable counties, with a median price of \$596,090 in March 2016. This represents a 22% increase from the March 2015 price of \$489k. This increase is fairly average across comparable counties, and while good news for homeowners and property tax revenues, it has resulted in the lower housing affordability for many households as seen above.

Fair Market Rents by County

Similarly, the fair market rent price also indicates affordability by examining rental prices 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.

An efficiency apartment in Sonoma County averaged \$934 a month, the second lowest among comparable counties, and a two-bedroom apartment would cost a renter an average of \$1,414 per month, the third lowest rate among comparable counties.



General Health

Leading Causes of Death

The leading causes of death are ranked by frequency of occurrence. **Cancer and Coronary Heart Disease accounted for nearly 40% of all deaths in Sonoma County from 2012 to 2014.**

While accounting for the most deaths, Coronary Heart Disease and Cancer saw the largest decreases in Age-Adjusted Death rate from the previous period. The age-adjusted death rate dropping 18% to 80.3 for Coronary Heart Disease, and Cancer saw a 7% decrease to 154.4.

Sonoma Health Action has set the goal of making Sonoma County the healthiest county in California by 2020. In an attempt to meet this goal, they have launched a number of successful community programs such as: iWalk, iCare, iGrow, Food System Alliance, Safe Routes to School and Healthy Students.

Age-Adjusted Death Rate

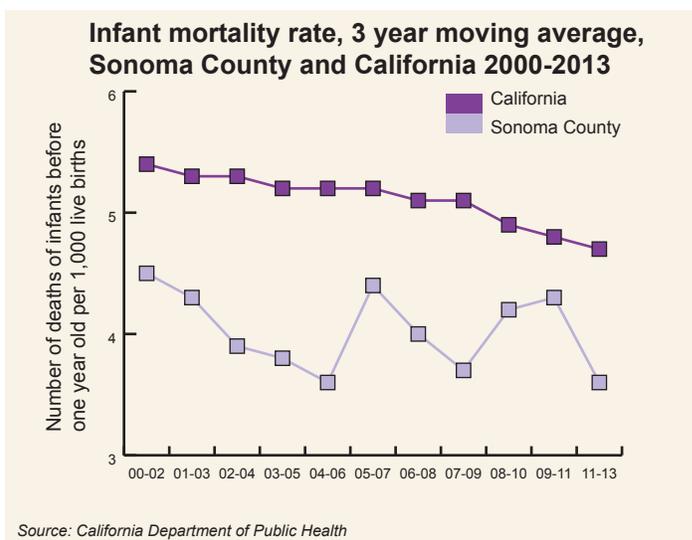
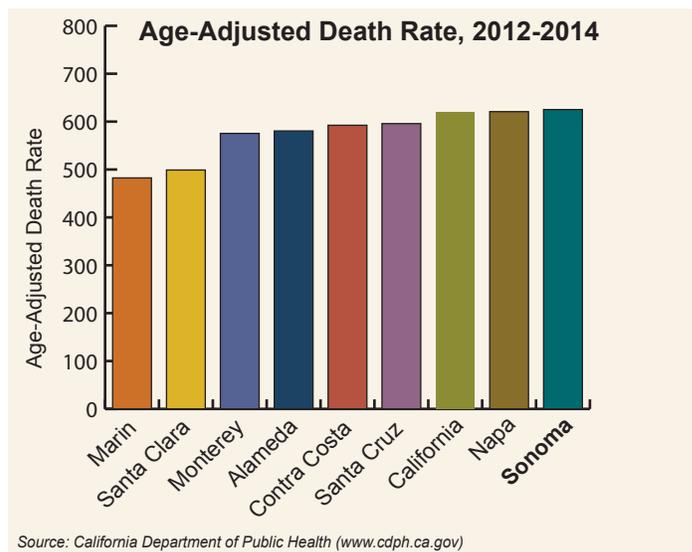
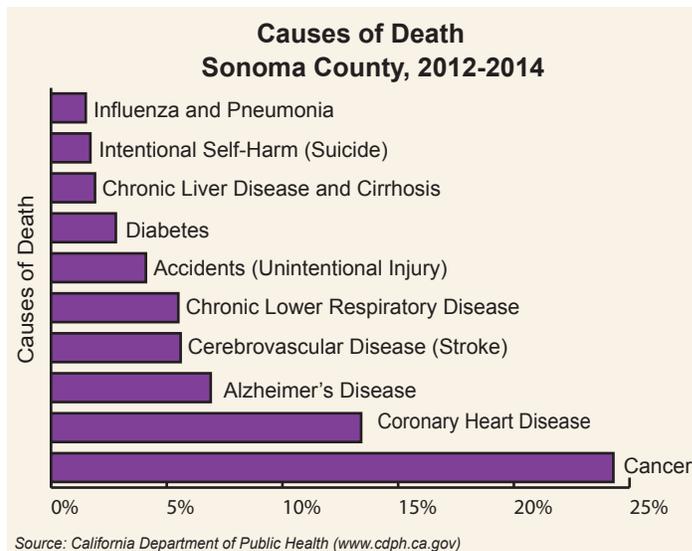
Mortality rates refers to the number of deaths per 100,000 people. **Sonoma County had an age-adjusted death rate of 625.1 in 2012-2014, which represented a 4% decrease from the previous rate of 650.**

With an Age-Adjusted Death Rate of 625.1, Sonoma County has the highest Age-Adjusted Death Rate among the 8 comparable counties and the state of California. Napa recorded the second highest age-adjusted death rate at 620.8.

Infant Mortality Rate

Infant mortality rates are an internationally measured indicator to compare and measure the overall well-being of an area based on factors ranging from economic, cultural, medical, and environmental health. While it is not a comprehensive indicator for the health of an area, high infant mortality rates correlate to some degree with poorer social and economic conditions.

The infant mortality rate in Sonoma County has fluctuated since 2000 but most recently tied its record low at 3.6 in 2011-2013. Sonoma County has consistently remained below the California infant mortality rate, which was 4.7 in 2011-2013.



Health

Drug & Alcohol Use

Smoking Habits

In 2014, only 9% of the population reported current cigarette smoking. This is lower than the 15% that reported current cigarette smoking in 2011, but significant change cannot be ascertained due to overlapping confidence intervals. Tobacco use is a leading cause of death in Sonoma County. There are approximately 570 smoking-attributable deaths each year in Sonoma County. Smoking harms nearly every organ in the body, and causes many diseases, including cancer, heart disease, and respiratory diseases.

The percent of those who never smoked or smoked less than 100 cigarettes has increased over the years from 43.5% in 2009 to 61.6% in 2014.

Medical Marijuana

California medical marijuana cards can be obtained after receiving a recommendation from a physician for medical marijuana treatment. Patients can then purchase marijuana products from dispensaries, or grow a limited number of marijuana plants for personal use (regulations vary by jurisdiction).

Sonoma County has given out 2,186 Medical Marijuana Identification Cards since the ID program began a decade ago, but has seen a decrease in demand over the last six years.

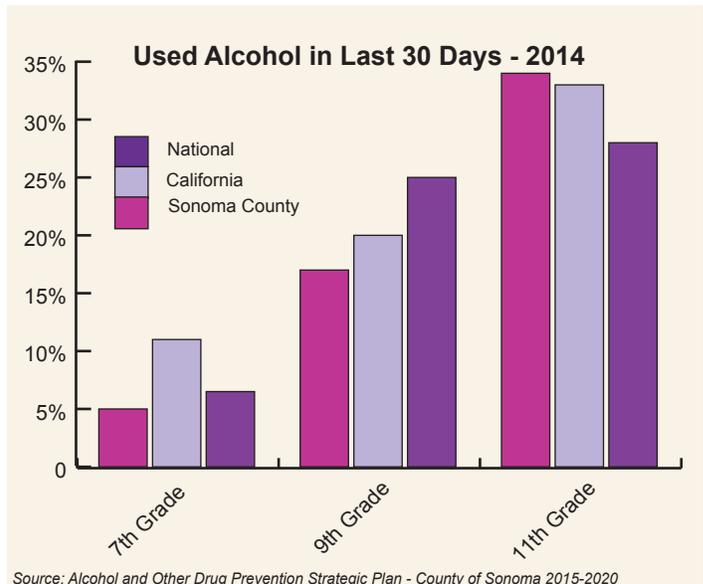
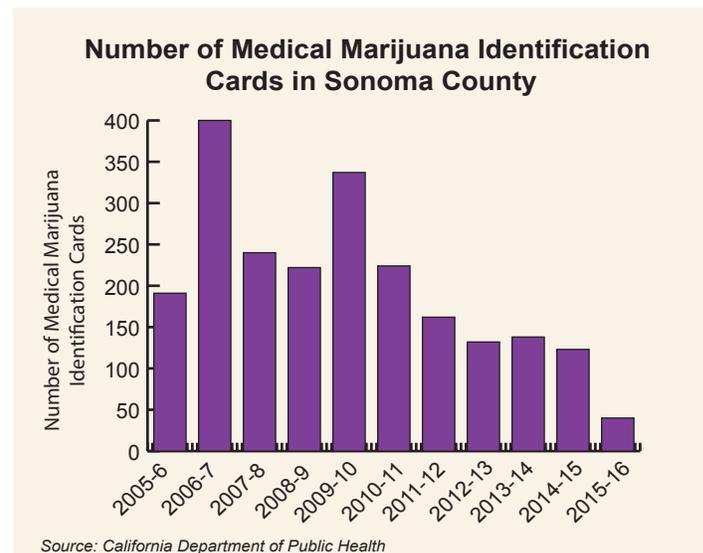
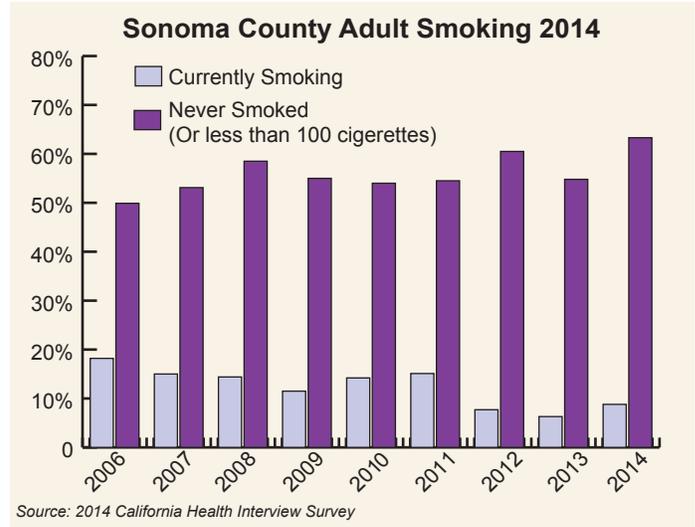
Substance Abuse

Substance abuse is overuse or dependence on alcohol and/or drugs which is detrimental to a person's health and well-being. It is important to track alcohol and drug use in Sonoma County due to the negative health implications on the individual, families, and communities.

Substance abuse is associated with a number of adverse health risks including the development of chronic diseases, such as chronic liver disease; 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; and perinatal health problems.

Many drug and alcohol abuse habits are formed during the teenage years. Sonoma County had a lower alcohol usage rate among children in 7th and 9th grade when compared to the California and national levels. However, once Sonoma County children reach 11th grade, the percentage of students using alcohol dramatically jumps from 17% to 34%, which is slightly above California's percentage, and well above the nationwide percentage of 28%.

Therefore, more awareness and prevention of alcohol use and the associated health risks is necessary during high school to counteract this doubling of alcohol use between 9th and 11th grade.



Youth Health Trends

Youth in Poverty

Social determinants of health, such as poverty, impact the health of all people including youth. Youth poverty, defined as the percentage of persons under the age of 18 living under the poverty line, is a social determinant that correlates with health.

After multiple years of steady increase, the youth poverty in Sonoma County slightly decreased in 2014 to 15.1% and still remains below the California average of 22.7%.

High School Substance Use

In 2013-2014, 34% of 11th grade respondents reported drinking at least 1 alcoholic drink in the past 30 days, while 23% recorded having binge drank (5+ drinks in one sitting), and 25% reported using marijuana.

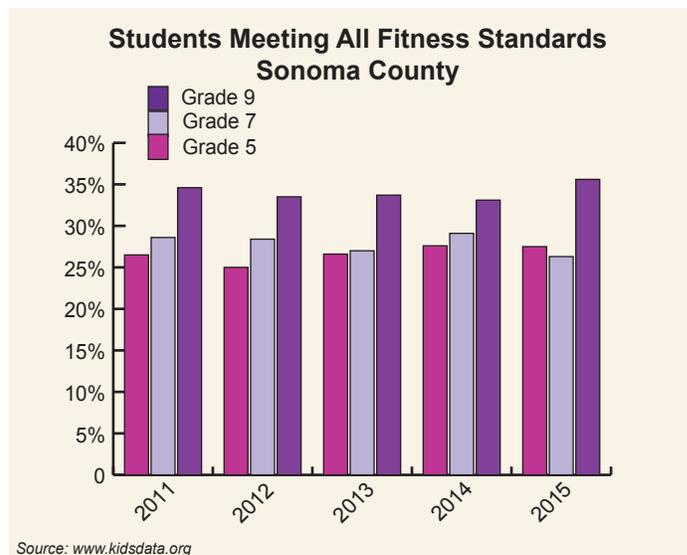
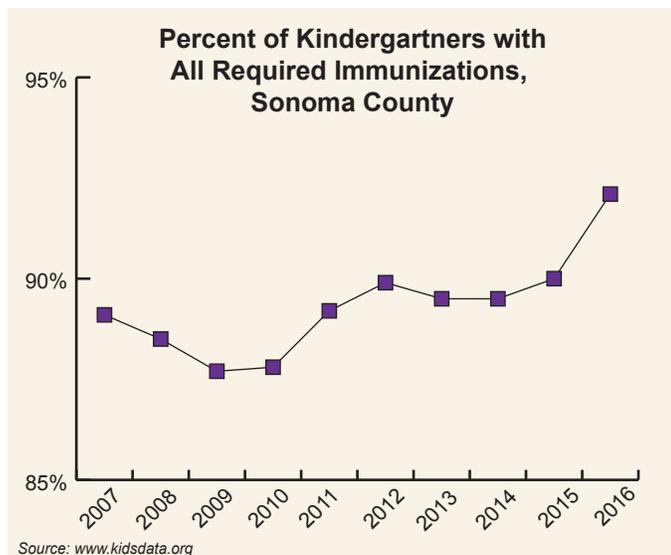
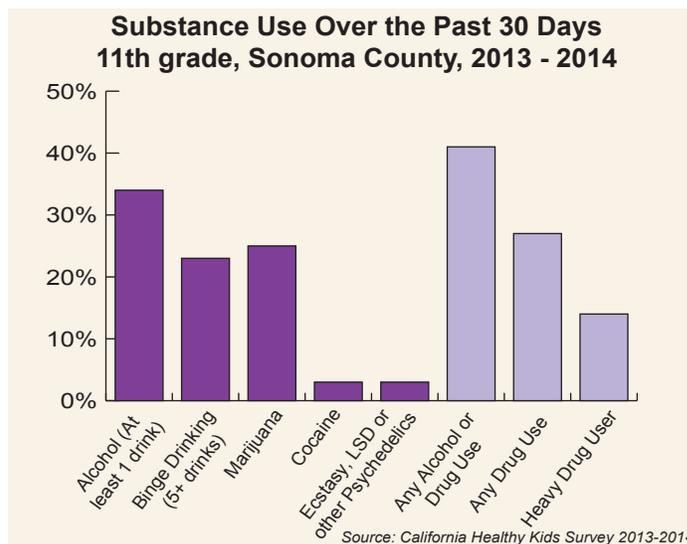
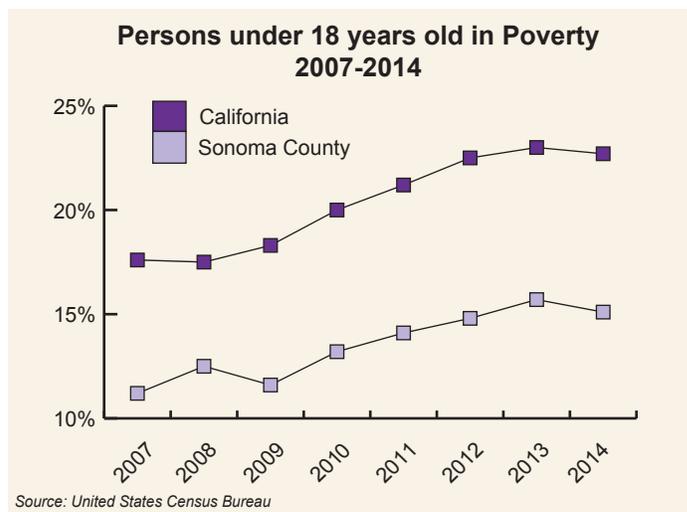
41% of 11th graders reported some type of alcohol or drug use in the past 30 days, while 27% reported any type of drug use, and 14% reported being a heavy drug user.

Kindergartners with Immunizations

In 2016, 92.1% of kindergartners had received all required immunizations, a slight increase from 2015 (90%). Receiving required immunizations is important for public health, and is an important defense against the spread of disease.

Physical Activity

Physical activity is an important part of healthy childhood development, and exercise has many important health impacts. 35.6% of 9th graders met all 6 of 6 fitness standards in Sonoma County in 2015, which is the highest percentage since 2011. While the percentage of 9th graders meeting all fitness standards increased from 2014 to 2015, the percentage of 5th graders meeting all fitness standards decreased from 2014 to 2015.



Health

Access to Healthcare

Health Insurance

Sonoma County continues to have a lower percentage of uninsured individuals than California and the United States.

The 65 and above age group remained consistent at around 99% health insurance coverage from 2011 to 2014.

Health insurance coverage expanded across all other age groups from 2011 to 2014. **Most notably, health insurance coverage increased by more than 9% among the 18 to 34 year old age group from 2011 to 2014.**

The percentage of the population who have private health insurance rose to 71%, almost 10% more than the state level of 62%. Meanwhile, individuals with public health insurance increased slightly to 33%. Some individuals may have both public and private health insurance.

The percentage of individuals with no health insurance in Sonoma County decreased 3.7% from 2011 to 2014.

Access to health insurance and regular care for residents is vital to the general health of Sonoma County.

Physicians

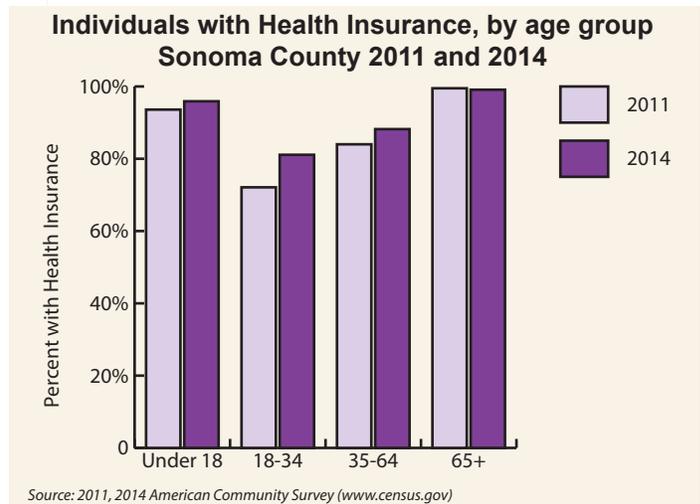
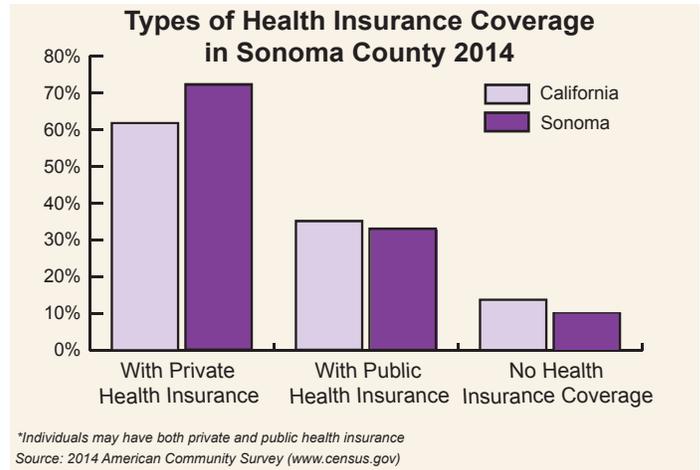
Sonoma County saw an increase in the total number of physicians from 2013 to 2014, according to the Medical Board of California.

The total number of physicians has been increasing over the past decade both for Sonoma County and California.

The number of people per physician has been decreasing for California over the past decade, down to 357.3 people per physician in 2014, still about 10 people per physician higher than Sonoma County.

In Sonoma County, the number of people per physician rose through 2011 to 362.7 people per physician, but has since decreased to 347.9 people per physician in 2014.

The number of people per physician can indicate if there are an adequate number of providers to serve the health care needs of the population.



Year	Sonoma Physicians	California Physicians	People per Physician Ratio (Sonoma)	People per Physician Ratio (California)
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
2011	1,334	102,372	362.7	380.4
2012	1,392	104,422	347.8	369.2
2013	1,420	106,284	348.6	360.7
2014	1,438	108,594	347.9	357.3

Source: Medical Board of California Annual Report

Health Centers

Health Centers are public and private non-profit health care organizations that provide high quality preventative and primary health care to patients. They provide care to a medically underserved population, providing free to low-cost care, based on patients' ability to pay. **There are currently 150 health centers in the state of California and health centers serve 1 in 14 people in the United States.**

Number of Patients Seen

Six Health Centers currently operate in Sonoma County, and in 2014 they saw over 100,000 patients. The Santa Rosa Community Health Center saw the most patients with 44,893 followed by the Petaluma Health Center with 22,909 patients.

Age and Race of Patients Seen

At least 22% of the patients seen at each of the health centers were children under 18 years old. Alliance Medical Center (Healdsburg) stood out with 39% of patients being children.

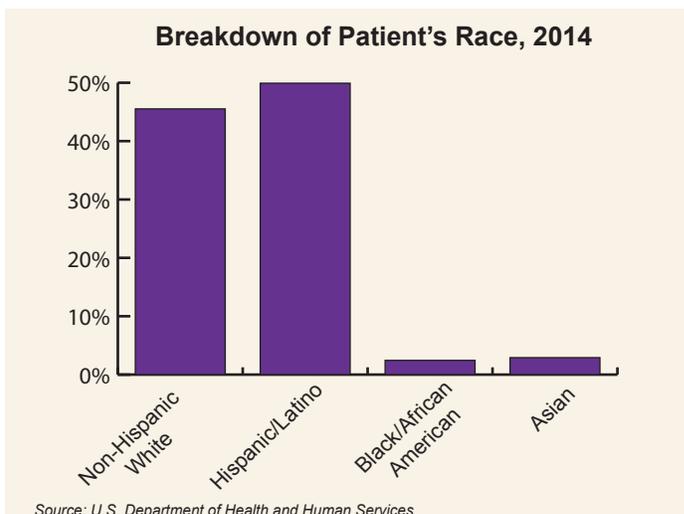
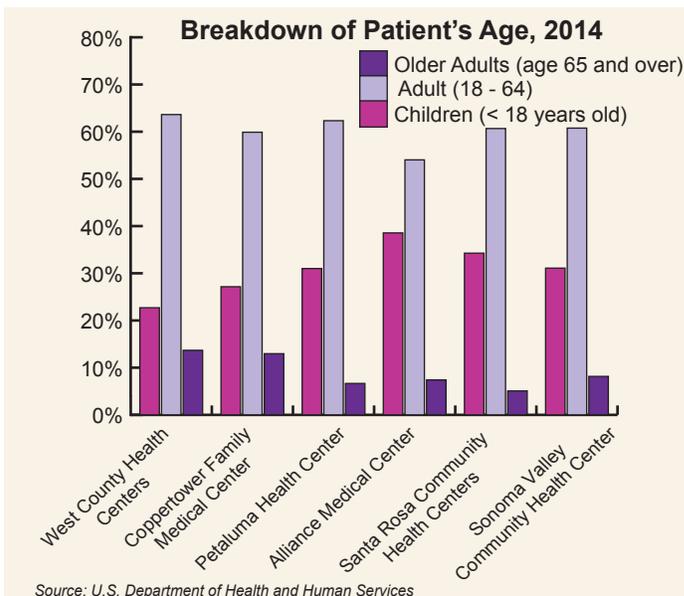
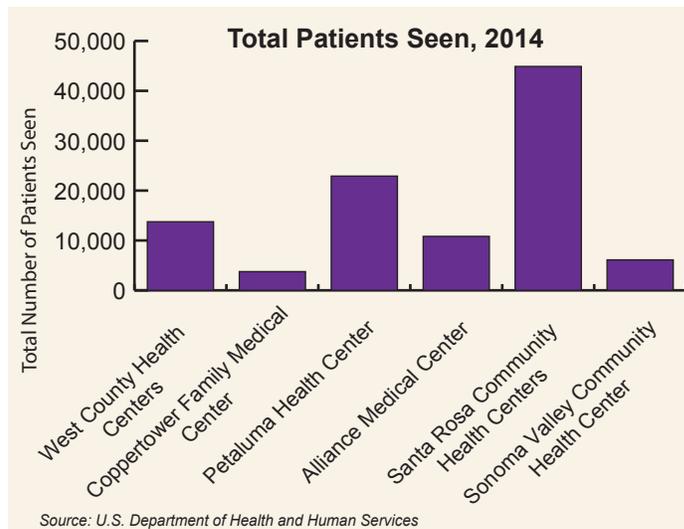
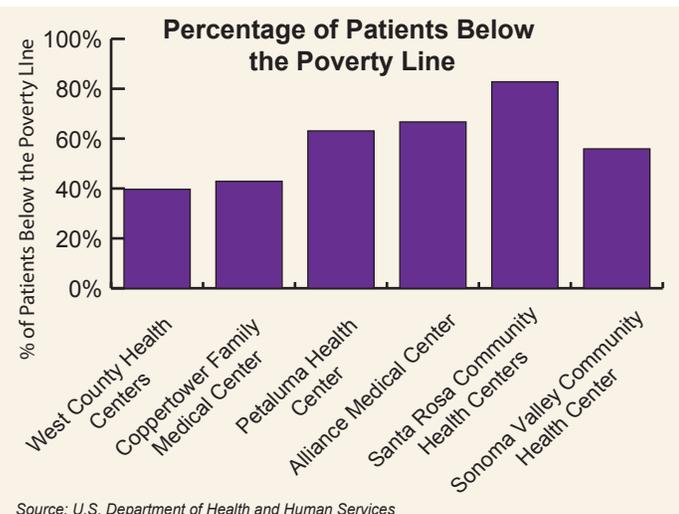
All of the centers saw roughly the same percentage of adults between 18 and 64 years old. **The Coppertower Family Medical Center (Cloverdale) and the West County Health Centers (Guerneville) saw the highest percentage of patients 65 years and older at more than 10%.**

Almost 50% of Health Center patients are Hispanic/Latino, followed by 46% being Non-Hispanic White patients. Therefore, the Health Centers are an important resource for minority families in Sonoma County.

Percentage of Patients in Poverty

68% of the patients served by the health centers in 2014 had incomes below the federal poverty line. This highlights the need of these patients and the community benefit provided by these health centers.

The Santa Rosa Community Health Centers saw the highest percentage of patients in poverty at 83%.



Environmental Quality

Environmental quality is defined as a composite of natural gas and electricity consumption, air quality, and waste generation.

Energy Use

Energy use as defined by electricity and natural gas consumption, serves a wide array of residential and industrial purposes from heating homes to powering infrastructure.

Total electricity consumption in Sonoma County decreased marginally in 2014, from 2971 million kWh in 2013 to 2942 million kWh. Natural gas consumption also saw a modest decrease over the same period in total use, from a per-capita rate of 118 therms to 102 therms.

Waste Disposal

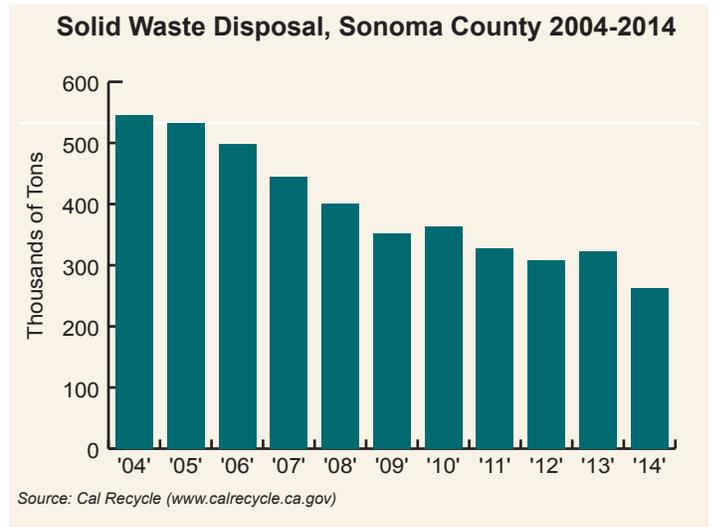
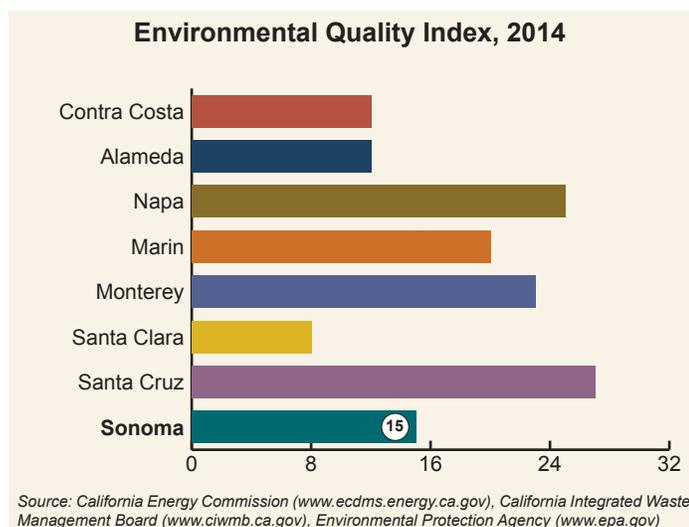
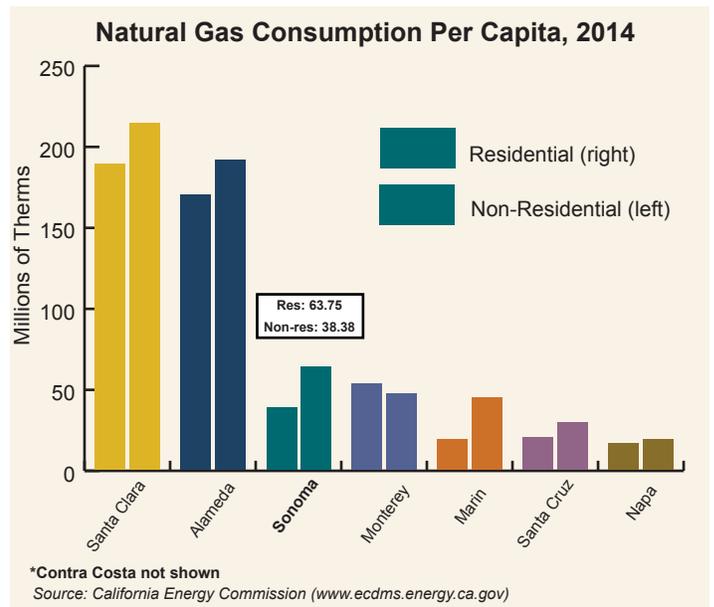
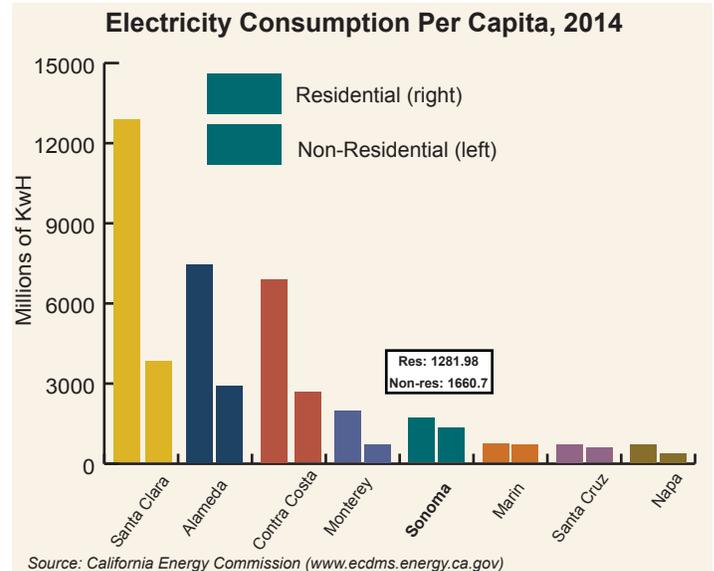
Sonoma County's volume of solid waste has been on the decline since 2004. Solid waste decreased from 322 thousand tons in 2013 to 262 thousand tons in 2014. Medium-growth projections predict that the amount of solid waste will increase between now and 2025 - but not to the peak seen in 2003.

Environmental Quality

Environmental Quality Index rankings are determined based on county performance relative to peer counties, with scores ranging from 1 for the worst performance and 8 for the best performance in each aspect of environmental quality. The overall index for each county was then calculated by totaling the ranking from each of the four categories.

Sonoma County was fifth on the 2014 Environmental Quality Index, with Santa Cruz taking the first position with 27 points and Santa Clara in final place with 8 points.

Measures of environmental quality correlate strongly with the county's quality of life. The health risks associated with negative environmental indicators, such as poor air quality, include asthma and other respiratory and cardiovascular diseases. Another byproduct of resource consumption is waste, which effects environment quality and can result in resource depletion.



Energy Usage & Renewable Capacity

In this section, we have illustrated Sonoma County's energy usage as indicated by electricity and natural gas consumption along with renewable energy capacity.

Renewable energy sources include biomass and biowaste, geothermal, hydroelectric, solar electric, and wind, which all generate clean energy with no greenhouse gas emissions.

Energy Consumption

Energy consumption had been increasing over the last few years due to economic recovery and production increases, but then decreased between 2013 and 2014.

Non-residential electricity consumption has been increasing at a 5% rate from 2010 to 2014, and shows signs of continued growth. Residential electricity consumption, however, witnessed a slight decline from 2013 to 2014.

Non-residential natural gas consumption witnessed a 7% increase from 2010 until 2013, whereupon there was a slight decrease. In residential natural gas consumption during the same period, this drop was much more significant.

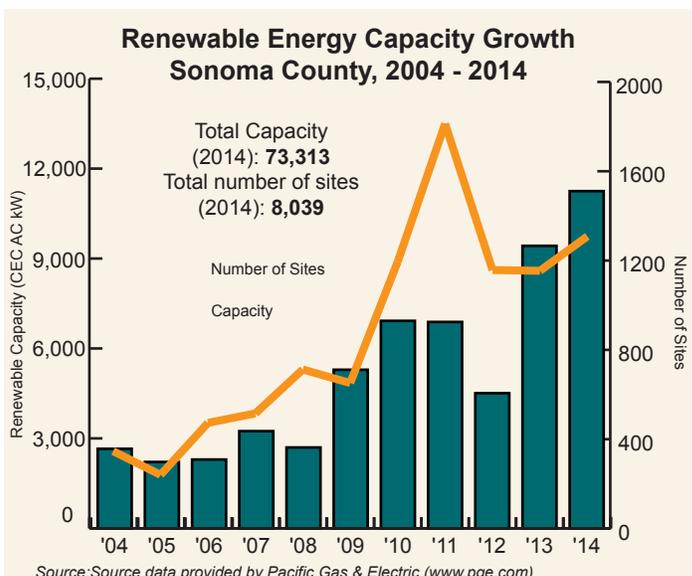
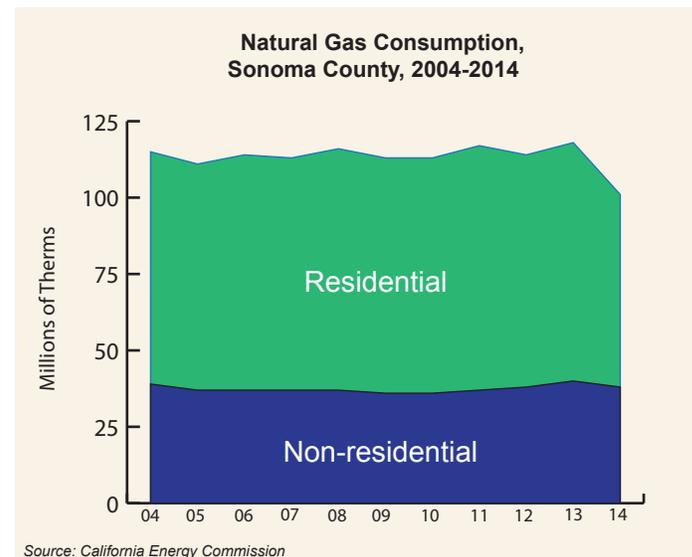
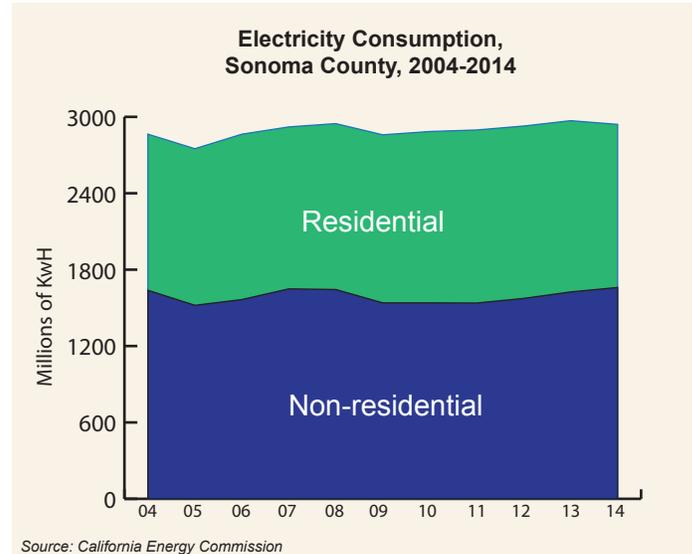
Renewable Energy Capacity

Renewable energy capacity in Sonoma County has increased substantially from 2.5 to 9.7 megawatts over the last decade.

In the last year alone, Sonoma County has added 1511 renewable energy sites for a total of 8,039 county-wide. The expansion of renewable energy providers, such as Sonoma Clean Power, and incentive programs for renewable installations, have been important drivers for the increase in renewable capacity.

Moving away from fossil fuels and increasing the renewable energy load conserves energy and provides a number of economic and environmental benefits. Rising energy prices have been one of the catalysts for the movement to renewable energy because it reduces pollution, diversifies the energy supply, and reduces dependence on increasingly costly non-renewable energy sources. In addition to its economic viability, the state has mandated investor-owned utilities companies, such as PG&E to produce a minimum of 20% of their energy from renewable resources, a mandate that PG&E has exceeded.

In 2014, Sonoma County increased its renewable energy capacity by 15%, with more projects lining up every week.



Environment

Air Quality and Protected Lands

Air Quality

Air quality is measured by the number of days that Sonoma County's air quality was classified as "good" by the U.S. Environmental Protection Agency's Air Quality Index. The County-wide community inventory includes greenhouse gas emissions occurring within all of Sonoma County's geographic boundaries.

Ozone concentrations in the Bay Area and southern North Coast AirBasin have shown no strong trends over the last 10 years.

No days were considered "unhealthy" in Sonoma County during 2015, and 89% of the days that were covered by the EPA in 2015 were considered "good".

Protected Lands

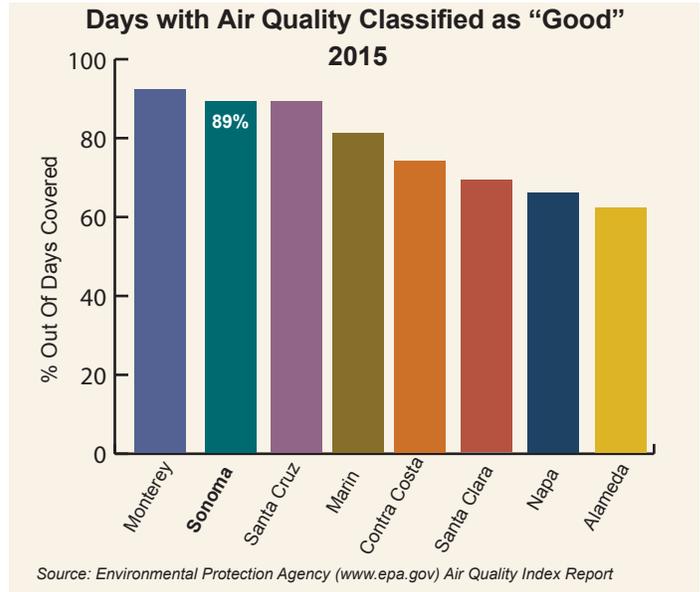
Protected lands are selected areas of land that are recognized and managed to ensure long-term preservation through the conservation of natural resources and historic sites. Protected lands in Sonoma County have increased at a greater percentage over the past decade than in any of the other eight Bay Area counties. More than 200,000 acres, or 21% of the total land in Sonoma County is protected.

Protected lands preserve Sonoma County's diverse landscape and offer significant benefits to the local economy through tourism, agriculture, outdoor recreation and other land-based services. According to the Conservation Lands Network, Sonoma County's 470,000 acres of forests and woodlands sequester an estimated 2.3 million tons of CO2 per year.

Greenhouse Gas Emissions

Greenhouse gas emissions are a good indicator for measuring the significance of Sonoma County's carbon footprint, and illustrate where the majority of our pollutant gas emissions are coming from.

In 2014, the bulk of Sonoma County's greenhouse gas emissions were attributed to transportation (65%), followed by natural gas (16.6%), electricity (16.2%), and finally solid waste (2.2%). In comparison to U.S. averages, transportation takes up a larger percentage of Sonoma County's overall emissions; while electricity in Sonoma County has a lower percentage of emissions than the US average.

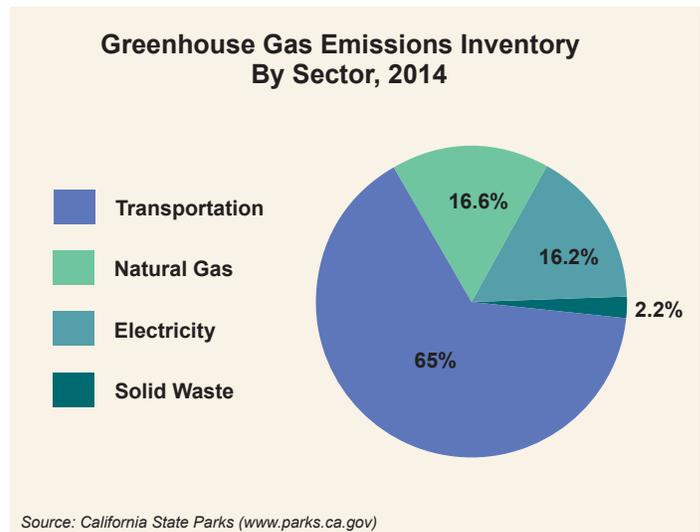


Area	Acres
Sonoma Coast SP	10,012
Austin Creek State Rec. Area (SRA)	5,927
Salt Point SP	5,093
Annadel SP	5,093
Sugarloaf Ridge SP	4,277
Fort Ross SP	3,393
Jack London SP	1,610
Armstrong Redwoods State Reserve (SR)	752
Kruse Rhododendron SR	317
Sonoma SHP	63
Petaluma Adobe SP	41
StillWater Cove Project	36

Source: California State Parks (www.parks.ca.gov)

Year	Protected Acres
2008	151,532
2010	172,391
2014	218,257

Source: Bay Area Open Space Council, Bay Area Protected Lands 2014 Edition



Water Conservation

Water conservation is one of the key strategies currently being employed to deal with Sonoma County's water challenges. Water conservation efforts have been brought to the forefront as drought conditions persist in Sonoma County, despite the economic rebound that had influenced water use in the region. Over the last few years, cities across the North Bay have been issuing conservation orders and in April 2015, Governor Jerry Brown announced watering restrictions and specific water conservation standards with a goal of decreasing urban water use by 25% statewide.

Water Deliveries

Water deliveries are measured as the amount of water sold to local retailers during the fiscal year. The Sonoma County Water Agency manages the delivery of water to around 600,000 people in Sonoma and northern Marin County, collects and distributes water from the Russian River Watershed (including Lake Sonoma) and Lake Mendocino.

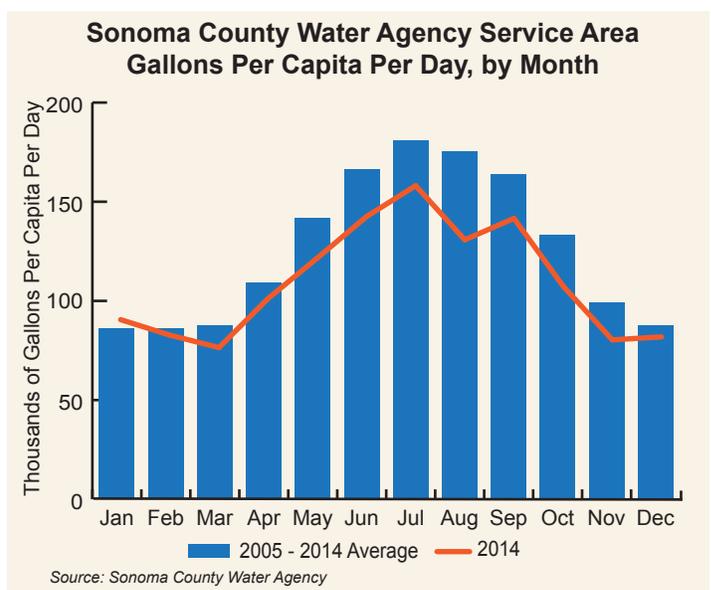
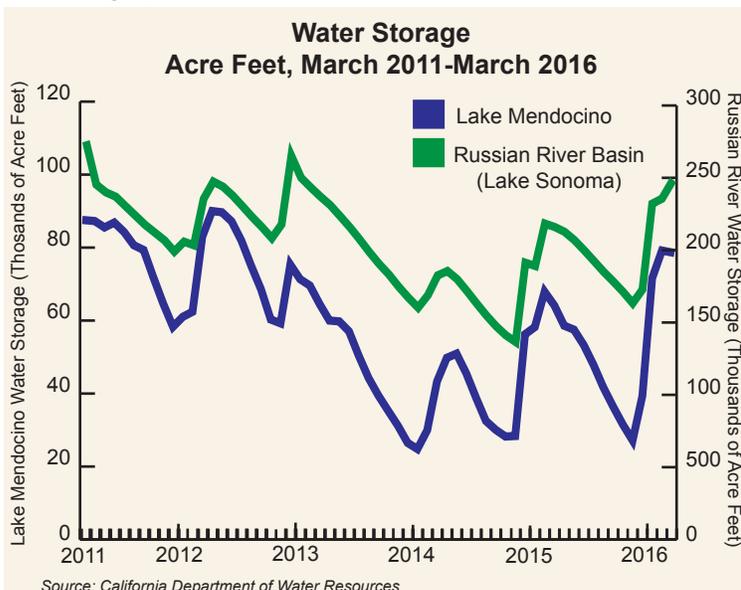
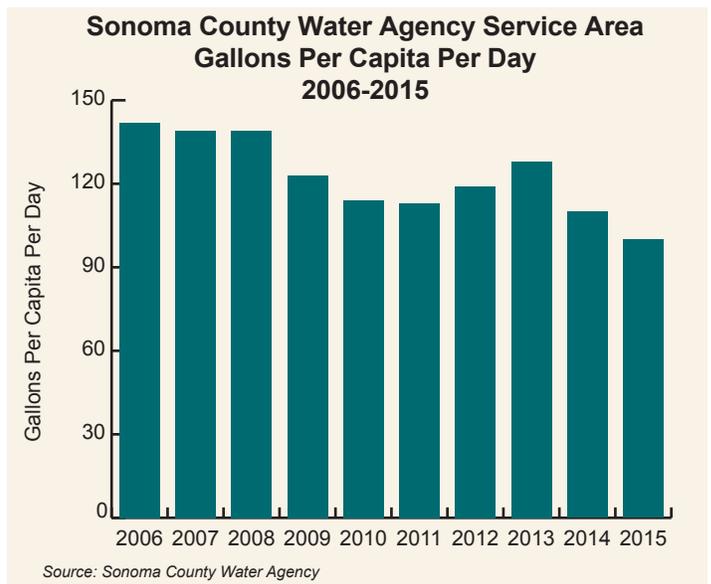
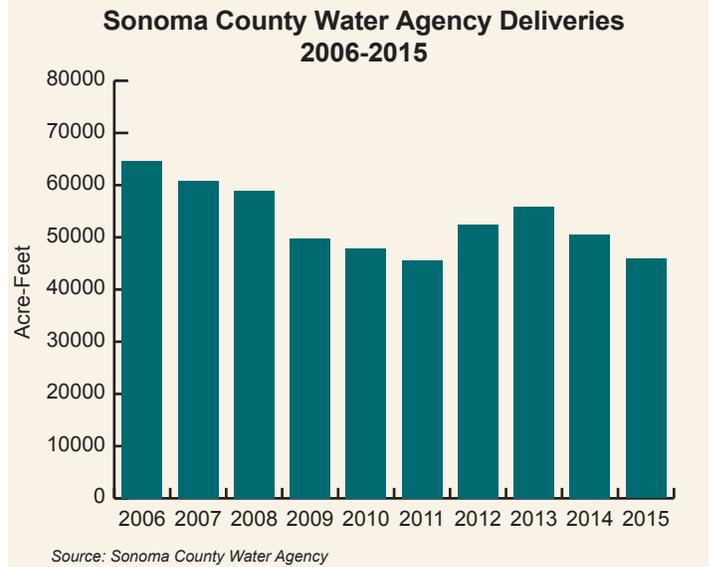
Water Usage

Water Use began to rebound and increase to pre-economic downturn levels when the driest years on record hit Sonoma County. Beginning in 2014 there has been a steady decrease in water usage as the community responded to the drought conditions. Water usage, as measured by gallons per capita per day, has decreased by 9.9% over the last year from 110 to 100 GPCD.

Water Storage

The Russian River Basin (including Lake Sonoma) and Lake Mendocino are two major sources of fresh water for Sonoma County residents. Drought conditions have improved over the last several months, and both water sources have risen levels almost as high as those found five years ago, prior to the drought.

After a series of extended dry seasons, the county is now just above average in terms of rainfall in 2015. These strong soaking rains have downgraded the current drought condition from its original levels of "extreme", though the county is still experiencing a drought period.



Waste Disposal and Composition

Waste reduction can help protect the environment and decrease the costs associated with waste removal. Increasing the amount of household hazardous waste collection participants helps mitigate the improper disposal of harmful waste that ends up in landfills, septic tanks, wastewater treatment systems, or local rivers and waterways where it can negatively impact the environment and human health.

Waste Disposal Per Capita

There has been a 28% decrease in the quantity of material waste disposed in Sonoma County since 2007. Single-stream recycling, which allows residents to place all recyclable items in one bin, in conjunction with a 50% state-mandated diversion law, has contributed to diversion efforts to reduce waste. Last year, there was an increase in the per capita disposal rate for California though Sonoma County stayed at the same rate from 2013. This is likely due to the increased consumption associated with an improving economy.

Household Hazardous Waste

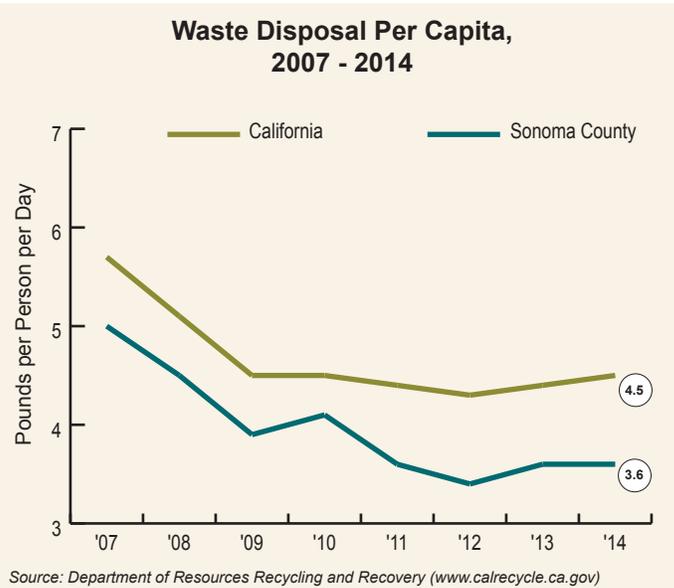
The number of residents participating in household toxic collection has fluctuated, and generally declined since 2012 due to a new paint take-back program. Residential toxic disposal is offered through the Sonoma County Waste Management Agency and includes a permanent toxic disposal facility, household pickups (fee may apply) and free multi-location drop-off options.

Waste Disposal by Material

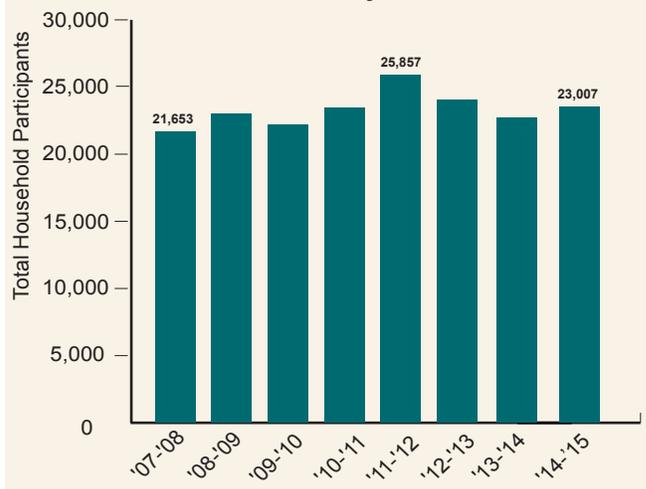
In 2014, Sonoma County disposed over 25,000 tons of food waste. This statistic highlights an opportunity for the county to use organic forms of waste more productively, by re-routing it from landfills to, for example, additional farm sales, hunger relief donations and composting. Sonoma County could experience both environmental and economic benefits from participating in more 'Waste-to-Value' practices such as these.

Waste Composition by Generator Types

This graph illustrates that a large portion of Sonoma County's waste composition is derived from organic sources. Paper and plastic also represent significant quantities here.

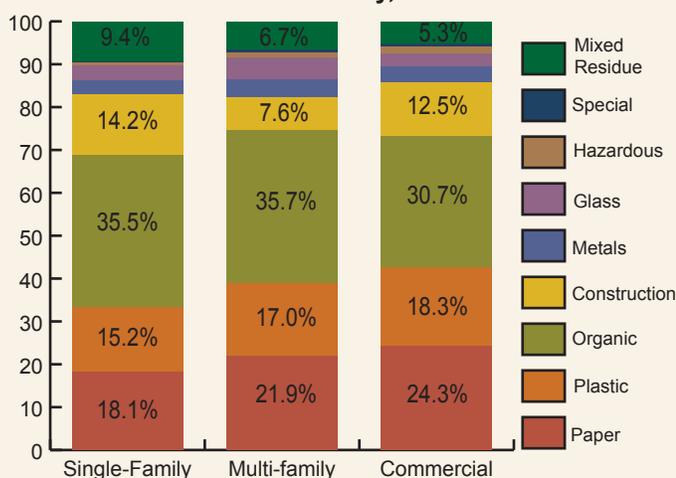


Household Hazardous Waste Collection Participants, Sonoma County, 2007-2015



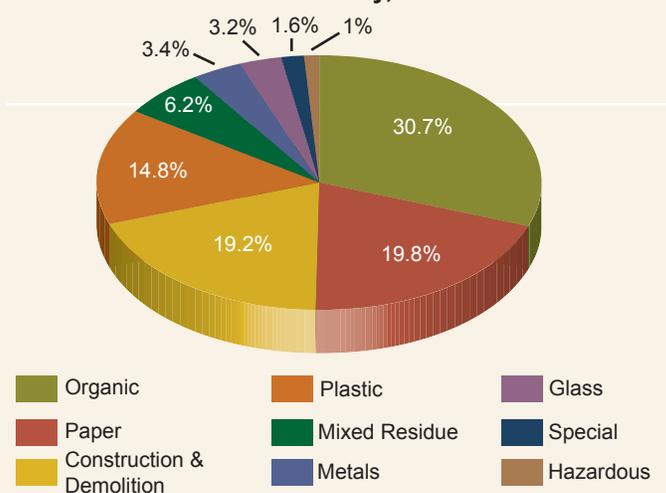
Source: Sonoma County Waste Management Agency

Waste Composition By Generator Types, Sonoma County, 2014



Source: Sonoma County Waste Management Agency, Waste Characterization Study 2014

Waste Disposal By Material, Sonoma County, 2014



Source: Sonoma County Waste Management Agency, Waste Characterization Study 2014

Methodology, Sources, and Notes

Note on Data Sources

The *2016 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 *2016 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 *2016 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 *2016 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. Readers are also invited to suggest indicators for future reports by calling (707) 565-7170 or e-mailing 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 quality of life index, 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.

Indicators Team

The *2016 Sonoma County Indicators* was prepared by the Economic Development Board project coordinators.

Brian Marland was the project lead, managed and edited the report's overall layout and content. He researched and prepared the Scorecard, Highlights, Competitiveness, and Economy sections.

Amelia Yim researched and prepared the Workforce and Highlights sections.

Josue Rivera researched and prepared the Tourism section.

Aadhar Chhabra researched and prepared the Society section.

Bryan Gross researched and prepared the Health section.

Alex Avard researched and prepared the Environment section.

Methodology, Sources, and Notes

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California Agricultural Statistics Service	www.nass.usda.gov
California Association of Realtors	www.car.org
California Cancer Registry	www.ccrca.org
California Department of Education	www.cde.ca.gov
California Department of Finance	www.dof.ca.gov
California Department of Health Services	www.dhs.ca.gov
California Department of Justice	www.oag.ca.gov
California Department of Public Health	www.cdph.ca.gov
California Department of Resources Recycling and Recovery (CalRecycle)	www.calrecycle.ca.gov
California Department of Transportation	www.dot.ca.gov
California Division of Travel and Tourism	www.visitcalifornia.com
California Employment Development Department	www.edd.ca.gov
California Energy Commission	www.energy.ca.gov
California Healthy Kids Survey	www.californiahealthykids.org
California Integrated Waste Management Board	www.ciwmb.ca.gov
California Postsecondary Education Commission	www.cpec.ca.gov
California State Parks	www.parks.ca.gov
California Travel & Tourism Commission	www.visitcalifornia.com
County of Sonoma Department of Transportation and Public Works	www.co.sonoma.ca.us/tpw
Dean Runyan & Associates	www.deanrunyan.com
Economic and Social Research Institute	www.esri.gov
Education Data Partnership	www.ed-data.k12.ca.us
Environmental Protection Agency	www.epa.gov
Medical Board of California	www.medbd.ca.gov
National Association of Realtors	www.realtor.org
North Bay Business Journal	www.northbaybusinessjournal.com
Pacific Gas & Electric	www.pge.com
Press Democrat	www.pressdemocrat.com
Robert Holmes Photography	www.robertholmesphotography.com
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Sonoma County Agricultural Preservation and Open Space District	www.sonomaopenspace.org
Sonoma County Airport	www.sonomacountyairport.org
Sonoma County Climate Protection Campaign	www.climateprotectioncampaign.org
Sonoma County Economic Development Board	www.sonomaedb.org
Sonoma County Office of Education	www.scoe.org
Sonoma County Planning and Resource Management Department	www.sonoma-county.org/prmd
Sonoma County Sheriff's Office	www.sonomasheriff.org
Sonoma County Waste Management	www.recyclenow.org
Sonoma County Water Agency	www.sonomacountywater.org
UCLA California Health Interview Survey	www.chis.ucla.edu
United States Bureau of Economic Analysis	www.bea.gov
United States Bureau of Labor Statistics	www.bls.gov
United States Bureau of the Census	www.census.gov
United States Department of Health and Human Services	www.hhs.gov
United States Department of Housing and Urban Development	www.hud.gov
Wanted Analytics	www.wantedanalytics.com

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

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