SONOMA COUNTY BRIEFING
DAVID VAUTIN, MTC – JUNE 12, 2017
Vital Signs tracks 40 performance indicators to understand if the Bay Area is (or is not) making progress towards key regional goals.
This initiative recognizes that transportation is not siloed – land use, the economy, the environment, and social equity intersect with it.
What is Vital Signs?

The interactive Vital Signs website allows residents to explore trends on the regional, county, city, and even neighborhood levels.

San Francisco remains the regional leader in the percentage of residents who take public transit to work, at 33 percent. Adding in walking, bicycling, and telecommuting, we find that 56 percent of San Francisco residents get to work each day without an automobile, a strikingly high mode share for a U.S. city. At the same time, commuters from some central Bay Area cities are outpacing other large urban centers in using transit to get to their jobs. Residents of cities like Emeryville, El Cerrito, Albany and Berkeley have transit mode shares even higher than much larger urban centers like San Jose and Oakland.

vitalsigns.mtc.ca.gov
The interactive Vital Signs website allows residents to explore trends on the regional, county, city, and even neighborhood levels.
Sonoma County saw a significant housing boom during the 20th century, but this has slowed significantly in recent years.

The county’s job market has roughly paralleled the region, with unemployment rates nearing natural levels.

Economic challenges continue to impact county residents, including low wages, displacement risk, and unaffordability.

Transportation investments have paid off by reducing traffic congestion (e.g., US-101), but modal shifts have been limited.

Critical differences exist between (and within) the various cities and towns of Sonoma County.
Bay Area population now exceeds 7.6 million.

Source: California Department of Finance
Sonoma County’s population growth has slowed over time.

ANNUAL PERCENT POPULATION GROWTH – BAY AREA & SONOMA COUNTY

Source: California Department of Finance
North Bay counties have similar growth trajectories; regional growth has been increasingly concentrated in the core.

### NOMINAL CHANGE BY COUNTY (IN THOUSANDS)

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Source: California Department of Finance; note: 2010s spans six years between 2010 and 2016
Growth in cities like Santa Rosa and Brentwood has slowed post-Recession, while growth in South Bay cities has sped up.

Source: California Department of Finance
Permitting has declined on the regional and county levels.

**Regional Performance**

**Permitted Units by Year – Bay Area**

- Single-Family Units
- Multi-Family Units

**Permitted Units by Year – Sonoma County**

- Single-Family Units
- Multi-Family Units

Outside the North Bay, permitting has accelerated noticeably.

ANNUAL HOUSING UNITS PERMITTED (SINCE 2010)

Source: California Homebuilding Foundation (2011-2015)
Greenfield development has slowed across the region over time; greenfield protection policies have made a difference.
Sonoma County has significantly slowed its development of greenfield lands, especially since 2010.

### County Greenfield Development Growth and Decline by Decade

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Source: Department of Conservation, Farmland Mapping and Monitoring Program
Major investments in wetland restoration in the mid-2000s resulted in thousands of new acres of Bay surface area.

**ANNUAL CHANGE IN SAN FRANCISCO BAY SURFACE AREA**

- Major wetland restorations in Sonoma County, Solano County, and Hayward
- Major wetland restorations in Novato
- Major wetland restorations in Redwood City and North Bay
- Major wetland restorations in Solano County

Source: BCDC Annual Report, 2015
Sonoma County saw a significant housing boom during the 20th century, but this has slowed significantly in recent years.

The county’s job market has roughly paralleled the region, with unemployment rates nearing natural levels.

Economic challenges continue to impact county residents, including low wages, displacement risk, and unaffordability.

Transportation investments have paid off by reducing traffic congestion (e.g., US-101), but modal shifts have been limited.

Critical differences exist between (and within) the various cities and towns of Sonoma County.
Bay Area employment now exceeds the year 2000 peak.

Source: California Department of Finance
Sonoma County tied the region for job growth rate in 2015.

ANNUAL PERCENT JOBS GROWTH – BAY AREA & SONOMA COUNTY

Source: California Department of Finance
Excluding the early 2000s, Sonoma County’s unemployment rate has closely mirrored the region as a whole.

UNEMPLOYMENT – BAY AREA AND SONOMA COUNTY

Source: Employment Development Department
Sonoma County is a small but growing component of the overall regional economy.

GROSS REGIONAL PRODUCT BY SUB-REGION

Source: Bureau of Economic Analysis (inflation-adjusted to 2015 dollars)
Note: GRP is reported at the MSA level; the San Jose MSA include Santa Clara County and San Benito County
Silicon Valley is booming, widening the gap in per capita GRP between northern and southern parts of the Bay Area.

**GROSS REGIONAL PRODUCT PER CAPITA**

- **San Jose MSA**
- **San Francisco MSA**
- **Napa County**
- **Sonoma County**
- **Solano County**

Sources: Bureau of Economic Analysis (inflation-adjusted to 2015 dollars); Department of Finance

Note: GRP is reported at the MSA level; the San Jose MSA include Santa Clara County and San Benito County.
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With a slight but steady decline in middle-wage jobs, the Bay Area has seen a long-term trend of job polarization.

**REGIONAL SHARE OF JOBS BY WAGE LEVEL**

- **High-Wage**
  - 2001: 40%
  - 2015: 45%
- **Low-Wage**
  - 2001: 37%
  - 2015: 37%
- **Middle-Wage**
  - 2001: 20%
  - 2015: 18%

Sources: Employment Development Department; U.S. Census Bureau/American Community Survey, 2015
High-wage jobs are now the plurality of jobs in all areas – with the notable exception of the North Bay.

**SHARE OF JOBS BY WAGE LEVEL BY SUBREGION**

- **SOUTH BAY**
  - High-Wage
  - Low-Wage
  - Middle-Wage

- **WEST BAY**

- **EAST BAY**

- **NORTH BAY**

**Note:** South Bay is Santa Clara + San Benito; West Bay is Marin, San Francisco + San Mateo; East Bay is Alameda + Contra Costa; North Bay is Sonoma, Solano + Napa counties

**Sources:** Employment Development Department; U.S. Census Bureau/American Community Survey, 2015
Median worker earnings in San Francisco and Silicon Valley have increased noticeably compared to the rest of the region.

Sources: U.S. Census Bureau/American Community Survey (inflation-adjusted to 2015 dollars); Bureau of Labor Statistics
Rural poverty remains a serious issue – Solano, Sonoma and Napa counties have the highest poverty rates in the region.

**2015 Poverty Rate by County**

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<thead>
<tr>
<th>County</th>
<th>Share of Population in Poverty (200% Level)</th>
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<tbody>
<tr>
<td>Solano</td>
<td>30%</td>
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<td>Sonoma</td>
<td>28%</td>
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<tr>
<td>Napa</td>
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<tr>
<td>San Francisco</td>
<td>25%</td>
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<tr>
<td>Alameda</td>
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<tr>
<td>Contra Costa</td>
<td>24%</td>
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<td>Santa Clara</td>
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<tr>
<td>San Mateo</td>
<td>21%</td>
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<tr>
<td>Marin</td>
<td>19%</td>
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</table>

Bay Area Regional Poverty Rate – 24%

Source: U.S. Census Bureau/American Community Survey, 2015

Note: Poverty is defined as living below twice the national poverty level.
Once a relatively minor issue in Sonoma County, displacement risk today is on par with San Francisco.

**DISPLACEMENT RISK BY COUNTY**

Sources: U.S. Census Bureau/American Community Survey; Longitudinal Tract Database; note that recent data relies upon 5-year rolling averages; only 2010 and 2015 are shown for clarity.
North Bay residents are increasingly moving out of the region and are being replaced by new arrivals from the West Bay.

**2014 NET MIGRATION BY SUBREGION**

- **East Bay**: -14,100 people
  - Out of Region: -14,100 people
  - SF + Silicon Valley: +14,100 people

- **North Bay**: -3,600 people
  - Out of Region: -9,100 people
  - SF + Silicon Valley: +3,600 people

- **San Francisco + Silicon Valley**: +14,100 people
  - Out of Region: -5,900 people
  - East Bay: -14,100 people

Sources: American Community Survey / U.S. Census Bureau - County-to-County Migration Data; note that data relies upon 5-year rolling averages; immigration from abroad not shown for simplicity.

**LOC FOCUS**

**MIGRATION**

**VITAL SIGNS**
Sonoma County home prices have risen since the end of the recession but remain below their 2005 peak.
Compared to booming rental markets elsewhere in the region, rents in Sonoma County have been more stable.
Sonoma County’s housing affordability – as a share of income – has closely tracked regional trends since 1980.

Source: U.S. Census Bureau/American Community Survey
Sonoma County saw a significant housing boom during the 20th century, but this has slowed significantly in recent years.

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Critical differences exist between (and within) the various cities and towns of Sonoma County.
Congestion spiked during construction along US-101, but Sonoma County is now benefiting from those projects.

Source: Iteris/PeMS, 2015
Commute times have ticked upward regionally in recent years, while remaining stable in Sonoma County.

COMMUTE TIMES – BAY AREA AND SONOMA COUNTY

Source: U.S. Census Bureau
Thanks to the county’s relative affordability, most Sonoma County workers are able to avoid a long-distance commute.

**COMMUTE ORIGINS OF SONOMA COUNTY WORKERS**
- Sonoma County: 91%
- Marin County: 2%
- Other Bay Area Counties: 4%
- Outside the Bay Area: 3%
- Other: 9%

**COMMUTE DESTINATIONS OF SONOMA COUNTY RESIDENTS**
- Sonoma County: 83%
- Marin County: 8%
- San Francisco: 3%
- Other Bay Area Counties: 5%
- Outside the Bay Area: 17%

Source: U.S. Census Bureau – Census Transportation Planning Package
Of course, weekday congestion hotspots do remain – notably, the Marin-Sonoma Narrows and in Santa Rosa.

Of the 162 congested segments in the Bay Area, seven are located in Sonoma County. All are along US-101.

**AM Peak Period:**
- 65. Southbound from Redwood Hwy to Petaluma Blvd
- 86. Northbound from Santa Rosa Ave to SR-12

**PM Peak Period:**
- 48. Northbound from Novato to Petaluma (Narrows)
- 53. Southbound from River Rd to SR-12
- 77. Northbound from Golf Course Dr to Baker Ave
- 154. Southbound near SR-12 Interchange
- 161. Northbound near SR-12 Interchange

On SR-37, new weekday hotspots have emerged in neighboring Marin & Solano counties (ranked 115 & 137).

Source: MTC, 2016
The Bay Area has made slight but meaningful gains in reducing auto dependence, mostly in the central Bay Area.

**COMMUTE MODE SHARE – BAY AREA**

- 1960: 70%
- 1970: 79%
- 1980: 81%
- 2000: 75%
- 2010: 81%

**COMMUTE MODE SHARE – SONOMA COUNTY**

- 1960: 76%
- 1970: 86%
- 1980: 87%
- 2000: 87%
- 2010: 86%

Source: U.S. Census Bureau
Per-capita GHG emissions from transportation have remained relatively steady in the Bay Area over the past five years.

Sources: California Energy Commission, 2015; American Community Survey; note that 2010 and 2011 data use an older methodology; * = Napa County variations are due to small sample size
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Sonoma County: City Comparison

- Measured by the share of residents who use a non-auto mode to get to work on a typical day
- Healdsburg, Sebastopol, and Sonoma are in the lead, thanks to their above-average rates of walking and telecommuting

Source: U.S. Census Bureau, 2015; city data limited to 5-year rolling average
Sonoma County: City Comparison

- Measured by (door-to-door) median commute time for all modes by place of residence
- All Sonoma County cities and towns have commute times shorter than the regional average
- Santa Rosa has the fifth-shortest commute time of any Bay Area city

Source: U.S. Census Bureau, 2015; city data limited to 5-year rolling average
Sonoma County: City Comparison

- Measured by the three-year rolling-average pavement condition index (PCI)
- Overall, Sonoma County has the worst road conditions of any Bay Area county
- Petaluma has the second-worst streets of any Bay Area city – only surpassed by Larkspur

Source: StreetSaver, 2016
Sonoma County:
City Comparison

- Measured by the number of housing units permitted between 2010 and 2015
- Santa Rosa and Petaluma combined account for three-quarters of all Sonoma County housing development since the end of the recession

Source: CIRB/CHF, 2010-2015
Sonoma County: City Comparison

- Measured by median household income based on place of residence
- Windsor and Petaluma have the highest annual incomes in the county
- Neighboring cities often have surprisingly different income levels

Source: U.S. Census Bureau, 2015; city data limited to 5-year rolling average
Sonoma County: City Comparison

- Measured by median home sale prices
- Rohnert Park is the most affordable Sonoma County city to purchase a home
- Santa Rosa falls in the middle of the pack, whereas Sebastopol and Healdsburg are the most expensive cities for buying

Source: Zillow, 2015
Sonoma County: City Comparison

- Measured based on share of population below 200% federal line
- Four Sonoma County cities have more than 30 percent of their population living below the 200% poverty line

County Average: 28%
Regional Average: 24%

Source: U.S. Census Bureau, 2015; city data limited to 5-year rolling average
QUESTIONS?

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UPCOMING DATA RELEASES:
JUNE 2017 — TRANSPORTATION
SUMMER 2017 — ENVIRONMENT

vitalsigns.mtc.ca.gov

Source: https://www.flickr.com/photos/isolino/8338786980/