



Economic Overview

Sonoma County, California



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Demographic Profile

The population in Sonoma County, California was 496,801 per American Community Survey data for 2016-2020.

The region has a civilian labor force of 266,216 with a participation rate of 64.9%. Of individuals 25 to 64 in Sonoma County, California, 34.4% have a bachelor's degree or higher which compares with 34.3% in the nation.

The median household income in Sonoma County, California is \$86,173 and the median house value is \$640,000.

Summary¹

	Percent			Value		
	Sonoma County, California	Lake County, California	California	Sonoma County, California	Lake County, California	California
Demographics						
Population (ACS)	—	—	—	496,801	64,276	39,346,023
Male	48.8%	49.9%	49.7%	242,657	32,099	19,562,882
Female	51.2%	50.1%	50.3%	254,144	32,177	19,783,141
Median Age ²	—	—	—	42.4	45.3	36.7
Under 18 Years	19.6%	21.0%	22.8%	97,601	13,528	8,956,641
18 to 24 Years	8.1%	6.6%	9.5%	40,081	4,266	3,724,239
25 to 34 Years	12.9%	10.7%	15.3%	64,016	6,847	6,007,913
35 to 44 Years	12.6%	11.3%	13.3%	62,401	7,270	5,233,903
45 to 54 Years	12.7%	11.7%	12.8%	63,292	7,521	5,039,155
55 to 64 Years	14.5%	15.8%	12.0%	71,949	10,159	4,739,675
65 to 74 Years	12.0%	14.3%	8.3%	59,609	9,163	3,270,380
75 Years and Over	7.6%	8.6%	6.0%	37,852	5,522	2,374,117
Race: White	72.5%	75.8%	56.1%	360,200	48,712	22,053,721
Race: Black or African American	1.7%	2.5%	5.7%	8,266	1,583	2,250,962
Race: American Indian and Alaska Native	0.9%	4.0%	0.8%	4,441	2,540	311,629
Race: Asian	4.3%	1.5%	14.8%	21,239	940	5,834,312
Race: Native Hawaiian and Other Pacific Islander	0.3%	0.0%	0.4%	1,614	15	149,636
Race: Some Other Race	13.3%	11.3%	14.3%	66,089	7,252	5,623,747
Race: Two or More Races	7.0%	5.0%	7.9%	34,952	3,234	3,122,016
Hispanic or Latino (of any race)	27.0%	21.3%	39.1%	134,024	13,667	15,380,929
Population Growth						
Population (Pop Estimates) ⁴	—	—	—	489,819	64,479	39,368,078
Population Annual Average Growth ⁴	0.1%	0.0%	0.5%	514	-26	204,853
People per Square Mile	—	—	—	313.7	51.2	253.6
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over)	64.9%	51.2%	63.6%	266,216	26,743	19,875,973
Prime-Age Labor Force Participation Rate and Size (civilian population 25-54)	84.6%	73.9%	81.5%	159,854	15,984	13,211,621
Armed Forces Labor Force	0.2%	0.0%	0.4%	1,010	22	140,982
Veterans, Age 18-64	3.2%	4.8%	3.0%	9,667	1,727	742,317
Veterans Labor Force Participation Rate and Size, Age 18-64	79.2%	55.8%	76.1%	7,653	964	565,185
Median Household Income ²	—	—	—	\$86,173	\$49,254	\$78,672
Per Capita Income	—	—	—	\$44,071	\$29,714	\$38,576
Mean Commute Time (minutes)	—	—	—	25.6	30.6	29.8
Commute via Public Transportation	1.6%	0.7%	4.6%	3,926	160	843,498
Educational Attainment, Age 25-64						
No High School Diploma	11.8%	14.6%	15.2%	30,862	4,656	3,199,850
High School Graduate	18.9%	31.8%	20.4%	49,401	10,100	4,282,776
Some College, No Degree	25.5%	26.5%	21.0%	66,828	8,433	4,412,172

Summary¹

	Percent			Value		
	Sonoma County, California	Lake County, California	California	Sonoma County, California	Lake County, California	California
Associate's Degree	9.4%	11.6%	8.0%	24,476	3,683	1,678,082
Bachelor's Degree	22.8%	10.2%	22.6%	59,624	3,244	4,741,354
Postgraduate Degree	11.6%	5.3%	12.9%	30,467	1,681	2,706,412
Housing						
Total Housing Units	—	—	—	206,498	34,477	14,210,945
Median House Value (of owner-occupied units) ²	—	—	—	\$640,000	\$238,000	\$538,500
Homeowner Vacancy	0.7%	2.3%	1.1%	803	417	77,702
Rental Vacancy	3.0%	3.7%	3.7%	2,269	317	227,993
Renter-Occupied Housing Units (% of Occupied Units)	38.7%	32.3%	44.7%	73,113	8,232	5,861,796
Occupied Housing Units with No Vehicle Available (% of Occupied Units)	4.8%	5.1%	7.0%	9,120	1,306	920,362
Social						
Poverty Level (of all people)	8.8%	17.5%	12.6%	43,086	11,057	4,853,434
Households Receiving Food Stamps/SNAP	5.9%	14.5%	9.0%	11,060	3,693	1,183,873
Enrolled in Grade 12 (% of total population)	1.4%	1.5%	1.5%	6,745	950	576,714
Disconnected Youth ³	1.9%	2.0%	1.9%	450	53	38,451
Children in Single Parent Families (% of all children)	31.3%	43.9%	32.8%	28,882	5,447	2,796,858
Uninsured	6.0%	7.3%	7.2%	29,765	4,642	2,806,173
With a Disability, Age 18-64	9.0%	17.3%	8.0%	26,778	6,144	1,944,580
With a Disability, Age 18-64, Labor Force Participation Rate and Size	50.7%	32.8%	43.0%	13,571	2,013	837,117
Foreign Born	16.6%	8.2%	26.6%	82,422	5,256	10,463,818
Speak English Less Than Very Well (population 5 yrs and over)	10.9%	5.8%	17.4%	51,560	3,511	6,432,102

Source: [JobsEQ®](#)

1. American Community Survey 2016-2020, unless noted otherwise

2. Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

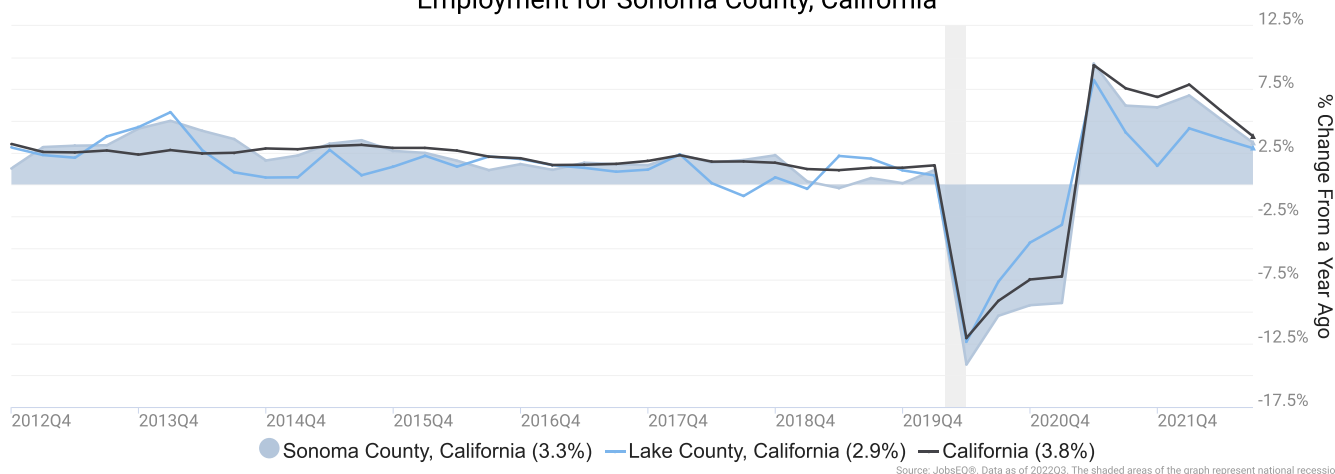
3. Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

4. Census Population Estimate for 2020, annual average growth rate since 2010.

Employment Trends

As of 2022Q3, total employment for Sonoma County, California was 224,144 (based on a four-quarter moving average). Over the year ending 2022Q3, employment increased 3.3% in the region.

Employment for Sonoma County, California

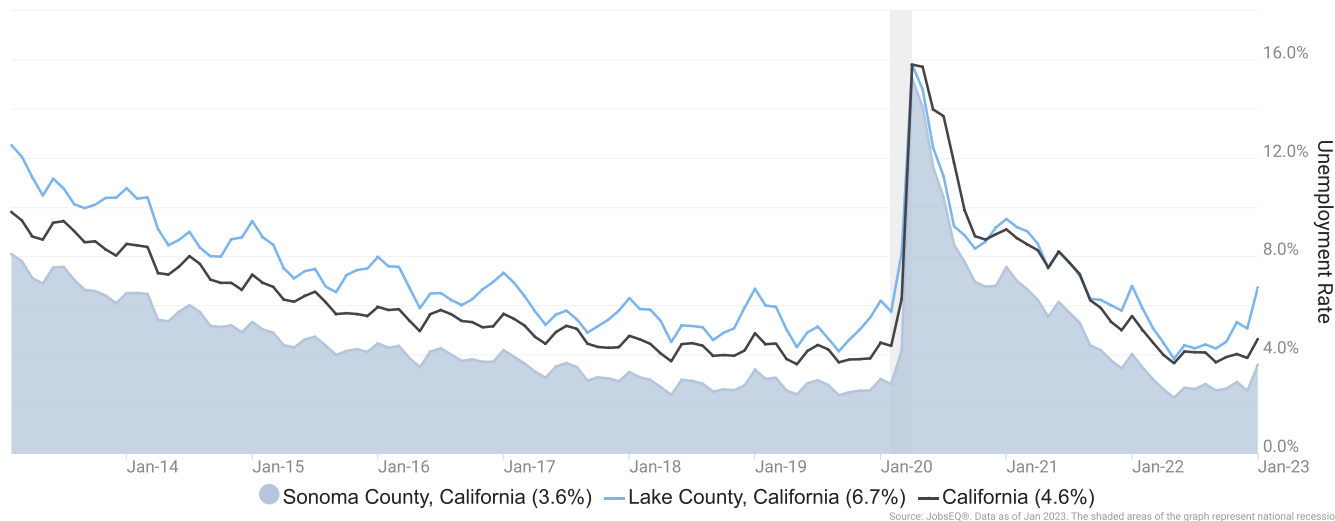


Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2022Q4 with preliminary estimates updated to 2022Q3.

Unemployment Rate

The unemployment rate for Sonoma County, California was 3.6% as of January 2023. The regional unemployment rate was lower than the national rate of 3.9%. One year earlier, in January 2022, the unemployment rate in Sonoma County, California was 4.0%.

Unemployment Rate for Sonoma County, California

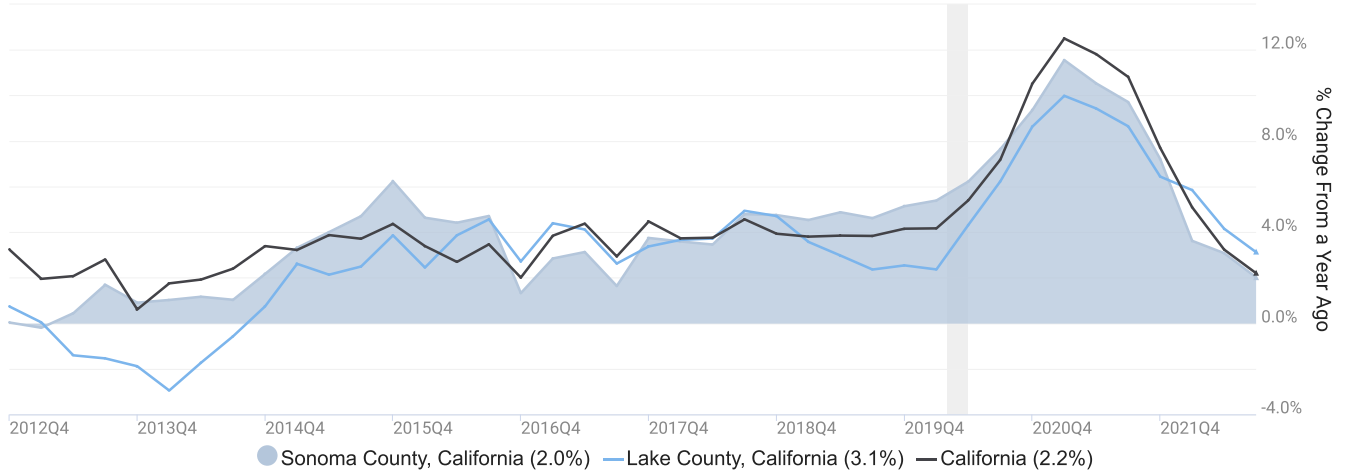


Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through January 2023.

Wage Trends

The average worker in Sonoma County, California earned annual wages of \$67,366 as of 2022Q3. Average annual wages per worker increased 2.0% in the region over the preceding four quarters. For comparison purposes, annual average wages were \$68,132 in the nation as of 2022Q3.

Average Annual Wages for Sonoma County, California



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2022Q2 with preliminary estimates updated to 2022Q3.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 62.8% higher in Sonoma County, California than the U.S. average.

Cost of Living Information

	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Sonoma County, California	\$67,366	162.8	\$41,374
Lake County, California	\$46,332	107.9	\$42,951
California	\$83,734	141.5	\$59,178
USA	\$68,132	100.0	\$68,132

Source: [JobsEQ®](#)

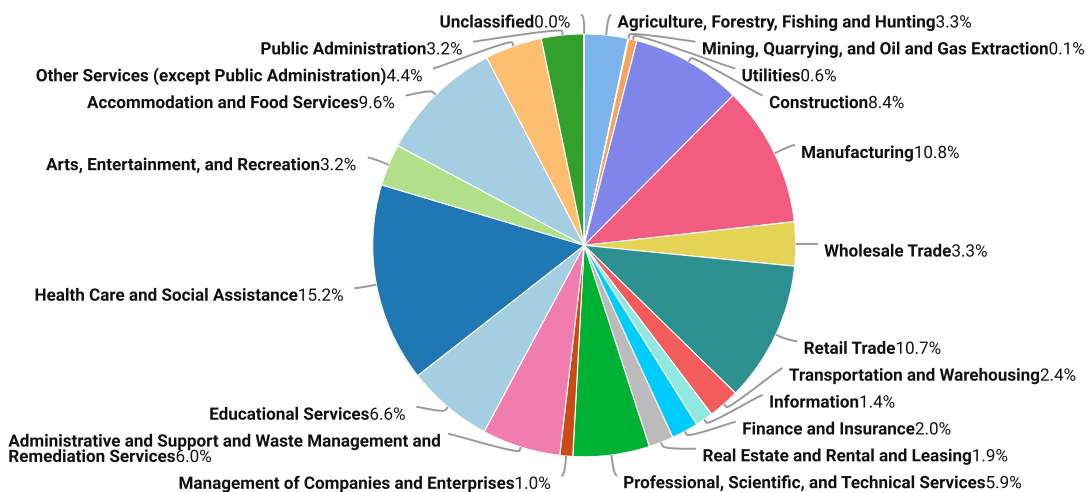
Data as of 2022Q3

Cost of Living per [COLI](#), data as of 2022Q4, imputed by Chmura where necessary.

Industry Snapshot

The largest sector in Sonoma County, California is Health Care and Social Assistance, employing 34,011 workers. The next-largest sectors in the region are Manufacturing (24,160 workers) and Retail Trade (24,089). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Agriculture, Forestry, Fishing and Hunting (LQ = 2.48), Arts, Entertainment, and Recreation (1.68), and Construction (1.42).

Total Workers for Sonoma County, California by Industry



Source: JobsEQ® Data as of 2022Q3

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2022Q2 with preliminary estimates updated to 2022Q3.

Sectors in Sonoma County, California with the highest average wages per worker are Utilities (\$126,232), Management of Companies and Enterprises (\$123,054), and Finance and Insurance (\$115,148). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Construction (+3,586 jobs), Administrative and Support and Waste Management and Remediation Services (+1,817), and Professional, Scientific, and Technical Services (+1,607).

Over the next 1 year, employment in Sonoma County, California is projected to expand by 386 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.1% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+378 jobs), Accommodation and Food Services (+239), and Other Services (except Public Administration) (+49).

Sonoma County, California, 2022Q3¹

NAICS	Industry	Empl	Current		5-Year History		Total Demand	1-Year Forecast			
			Avg Ann Wages	LQ	Empl Change	Ann %		Exits	Transfers	Empl Growth	Ann % Growth
62	Health Care and Social Assistance	34,011	\$71,289	1.06	-519	-0.3%	3,889	1,617	1,894	378	1.1%
31	Manufacturing	24,160	\$100,800	1.33	705	0.6%	2,540	973	1,654	-87	-0.4%
44	Retail Trade	24,089	\$45,710	1.06	-2,005	-1.6%	3,219	1,464	1,933	-177	-0.7%
72	Accommodation and Food Services	21,458	\$33,401	1.13	-501	-0.5%	3,998	1,701	2,059	239	1.1%
23	Construction	18,877	\$74,800	1.42	3,586	4.3%	1,813	662	1,182	-31	-0.2%
61	Educational Services	14,777	\$60,339	0.83	-1,217	-1.6%	1,410	691	764	-44	-0.3%
56	Administrative and Support and Waste Management and Remediation Services	13,433	\$51,311	0.92	1,817	2.9%	1,620	661	966	-7	0.0%
54	Professional, Scientific, and Technical Services	13,122	\$85,838	0.80	1,607	2.6%	1,211	435	745	32	0.2%
81	Other Services (except Public Administration)	9,774	\$42,869	1.02	-444	-0.9%	1,231	497	685	49	0.5%
42	Wholesale Trade	7,499	\$81,782	0.89	-298	-0.8%	812	308	525	-20	-0.3%
11	Agriculture, Forestry, Fishing and Hunting	7,432	\$52,925	2.48	-112	-0.3%	983	417	530	36	0.5%
92	Public Administration	7,268	\$92,825	0.70	-212	-0.6%	694	298	424	-28	-0.4%
71	Arts, Entertainment, and Recreation	7,184	\$43,602	1.68	-116	-0.3%	1,095	447	618	29	0.4%
48	Transportation and Warehousing	5,377	\$67,392	0.48	260	1.0%	651	262	383	6	0.1%
52	Finance and Insurance	4,592	\$115,148	0.51	-865	-3.4%	427	164	268	-4	-0.1%
53	Real Estate and Rental and Leasing	4,233	\$70,048	1.07	126	0.6%	421	196	242	-17	-0.4%
51	Information	3,054	\$79,101	0.67	-122	-0.8%	299	106	192	1	0.0%
55	Management of Companies and Enterprises	2,209	\$123,054	0.65	-78	-0.7%	205	77	131	-3	-0.1%
22	Utilities	1,432	\$126,232	1.26	159	2.4%	130	50	88	-7	-0.5%
21	Mining, Quarrying, and Oil and Gas Extraction	152	\$77,249	0.20	17	2.4%	16	5	11	0	0.0%
99	Unclassified	10	\$79,940	0.02	-823	-58.6%	1	0	1	0	0.2%
Total - All Industries		224,144	\$67,366	1.00	967	0.1%	26,236	10,807	15,044	386	0.2%

Source: [JobsEQ®](https://www.chmuraecon.com/jobseq)

Data as of 2022Q3

Note: Figures may not sum due to rounding.

1. All data based upon a four-quarter moving average

Exits and transfers are approximate estimates based upon occupation separation rates.

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2022Q2 with preliminary estimates updated to 2022Q3. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in Sonoma County, California is Office and Administrative Support Occupations, employing 23,252 workers. The next-largest occupation groups in the region are Sales and Related Occupations (21,930 workers) and Food Preparation and Serving Related Occupations (20,602). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 3.55), Construction and Extraction Occupations (1.32), and Building and Grounds Cleaning and Maintenance Occupations (1.32).

Occupation groups in Sonoma County, California with the highest average wages per worker are Legal Occupations (\$138,500), Healthcare Practitioners and Technical Occupations (\$129,100), and Management Occupations (\$128,600). The unemployment rate in the region varied among the major groups from 1.0% among Healthcare Practitioners and Technical Occupations to 5.6% among Food Preparation and Serving Related Occupations.

Over the next 1 year, the fastest growing occupation group in Sonoma County, California is expected to be Healthcare Support Occupations with a +1.9% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Healthcare Support Occupations (+227 jobs) and Food Preparation and Serving Related Occupations (+174). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (3,894 jobs) and Sales and Related Occupations (2,996).

Sonoma County, California, 2022Q3¹

SOC	Occupation	Empl	Mean Ann Wages ²	Current			5-Year History			Total Demand	1-Year Forecast			
				LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %		Exits	Transfers	Empl Growth	Ann % Growth
43-0000	Office and Administrative Support	23,252	\$53,000	0.84	702	2.6%	444	-2,389	-1.9%	2,561	1,242	1,500	-181	-0.8%
41-0000	Sales and Related	21,930	\$54,000	1.04	865	3.8%	779	-1,809	-1.6%	2,861	1,349	1,647	-135	-0.6%
35-0000	Food Preparation and Serving Related	20,602	\$40,900	1.16	1,268	5.6%	759	-808	-0.8%	4,068	1,775	2,119	174	0.8%
53-0000	Transportation and Material Moving	17,585	\$49,200	0.89	767	4.0%	339	224	0.3%	2,455	921	1,508	26	0.1%
11-0000	Management	15,562	\$128,600	1.02	271	1.7%	490	872	1.2%	1,390	486	855	49	0.3%
47-0000	Construction and Extraction	13,332	\$71,400	1.32	538	3.8%	64	1,852	3.0%	1,268	451	825	-8	-0.1%
51-0000	Production	12,428	\$50,700	0.98	387	3.0%	206	-542	-0.8%	1,355	549	881	-75	-0.6%
31-0000	Healthcare Support	12,202	\$40,500	1.24	410	3.0%	429	526	0.9%	2,010	835	948	227	1.9%
13-0000	Business and Financial Operations	12,024	\$88,400	0.84	219	1.8%	222	1,875	3.4%	1,103	367	711	25	0.2%
29-0000	Healthcare Practitioners and Technical	11,860	\$129,100	0.92	118	1.0%	1,312	-102	-0.2%	789	364	356	69	0.6%
25-0000	Educational Instruction and Library	10,488	\$74,500	0.88	225	2.2%	362	-874	-1.6%	984	503	490	-10	-0.1%
37-0000	Building and Grounds Cleaning and Maintenance	9,753	\$46,500	1.32	395	3.9%	189	943	2.1%	1,319	584	723	12	0.1%
49-0000	Installation, Maintenance, and Repair	7,961	\$64,100	0.92	159	1.8%	186	212	0.5%	780	293	483	4	0.1%
39-0000	Personal Care and Service	6,229	\$43,500	1.15	413	5.5%	143	-262	-0.8%	1,178	444	672	62	1.0%
45-0000	Farming, Fishing, and Forestry	5,101	\$41,000	3.55	188	3.7%	10	92	0.4%	856	269	559	29	0.6%
15-0000	Computer and Mathematical	4,996	\$114,300	0.65	62	1.2%	174	856	3.8%	370	109	242	19	0.4%

Sonoma County, California, 2022Q3¹

SOC	Occupation	Empl	Mean Ann Wages ²	Current			5-Year History			1-Year Forecast				
				LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
27- 0000	Arts, Design, Entertainment, Sports, and Media	4,373	\$73,600	1.11	180	4.0%	87	-3	0.0%	474	187	271	16	0.4%
33- 0000	Protective Service	3,965	\$69,700	0.83	140	2.9%	113	187	1.0%	507	238	272	-3	-0.1%
21- 0000	Community and Social Service	3,920	\$69,400	0.99	63	1.6%	266	-103	-0.5%	426	162	229	35	0.9%
17- 0000	Architecture and Engineering	3,391	\$108,600	0.93	56	1.6%	127	114	0.7%	245	96	153	-4	-0.1%
19- 0000	Life, Physical, and Social Science	1,749	\$93,900	0.89	40	2.1%	124	66	0.8%	167	41	122	3	0.2%
23- 0000	Legal	1,441	\$138,500	0.75	18	1.2%	22	38	0.5%	101	44	50	7	0.5%
Total - All Occupations		224,144	\$67,800	1.00	7,482	3.1%	6,843	967	0.1%	27,310	11,309	15,615	386	0.2%

Source: [JobsEQ®](#)

Data as of 2022Q3 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Data based on a four-quarter moving average unless noted otherwise.

2. Wage data represent the average for all Covered Employment

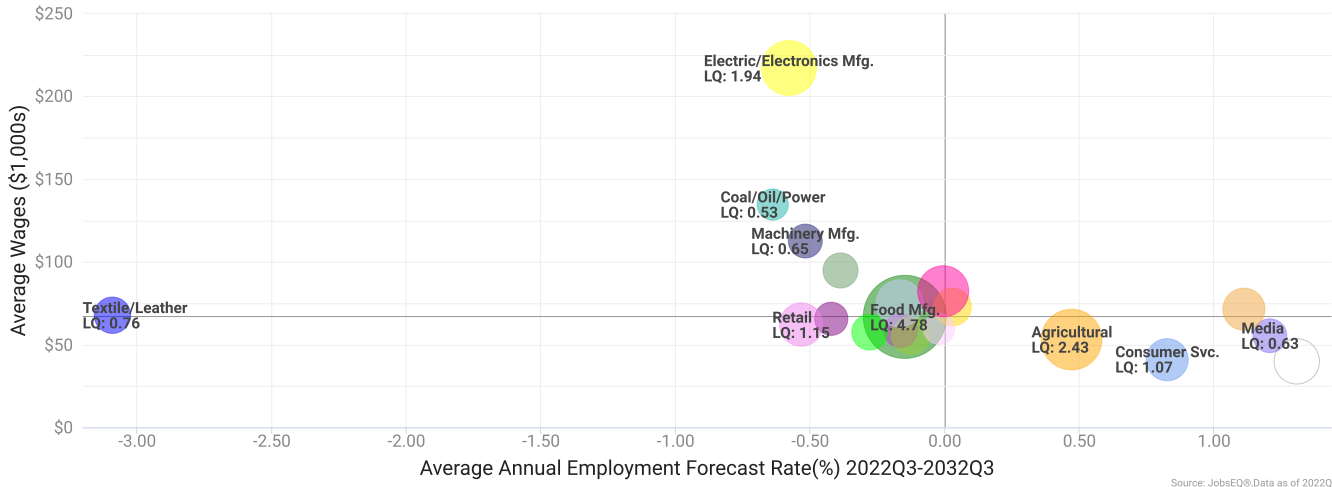
3. Data represent found online ads active within the last thirty days in the selected region. Due to alternative county-assignment algorithms, ad counts in this analytic may not match that shown in RTI (nor in the popup window ad list). Ad counts for ZCTA-based regions are estimates.

Occupation employment data are estimated via industry employment data and the estimated industry/occupation mix. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through 2022Q2, imputed where necessary with preliminary estimates updated to 2022Q3. Wages by occupation are as of 2022 provided by the BLS and imputed where necessary. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Industry Clusters

A cluster is a geographic concentration of interrelated industries or occupations. The industry cluster in Sonoma County, California with the highest relative concentration is Food Mfg. with a location quotient of 4.78. This cluster employs 12,702 workers in the region with an average wage of \$66,744. Employment in the Food Mfg. cluster is projected to contract in the region about 0.1% per year over the next ten years.

Industry Clusters for Sonoma County, California as of 2022Q3

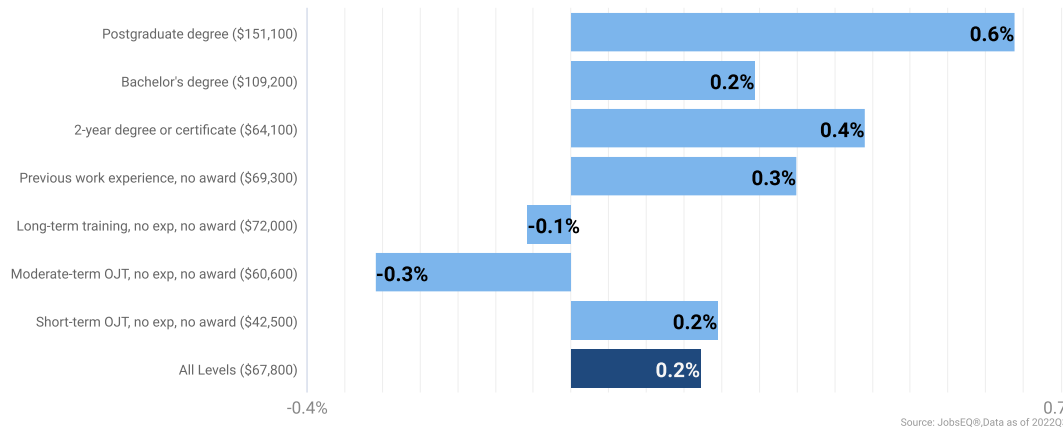


Location quotient and average wage data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, imputed where necessary, and updated through 2022Q2 with preliminary estimates updated to 2022Q3. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in Sonoma County, California is projected to grow 0.2% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 0.6% per year, those requiring a bachelor’s degree are forecast to grow 0.2% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 0.4% per year.

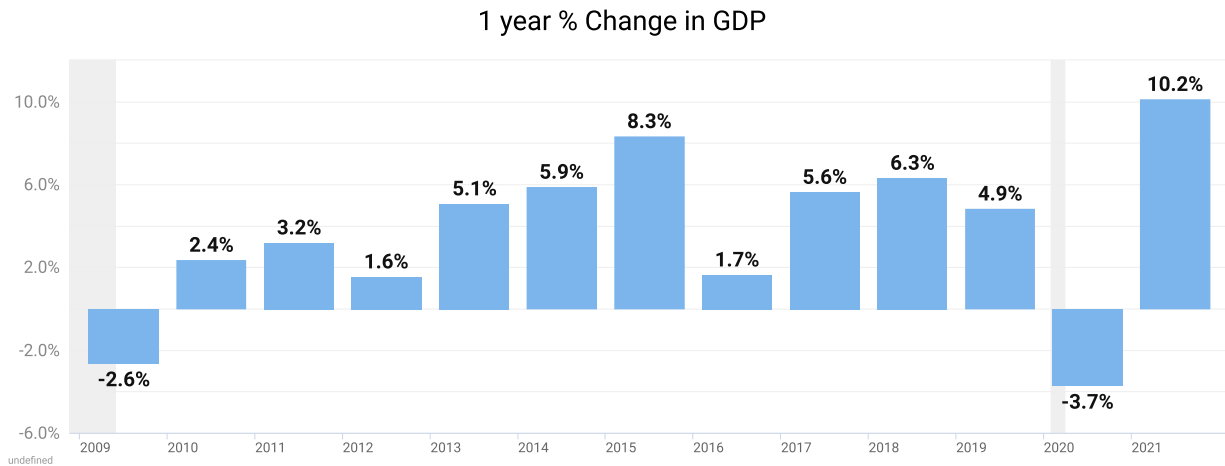
Annual Average Projected Job Growth by Training Required



Employment by occupation data are estimates as of 2022Q3. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

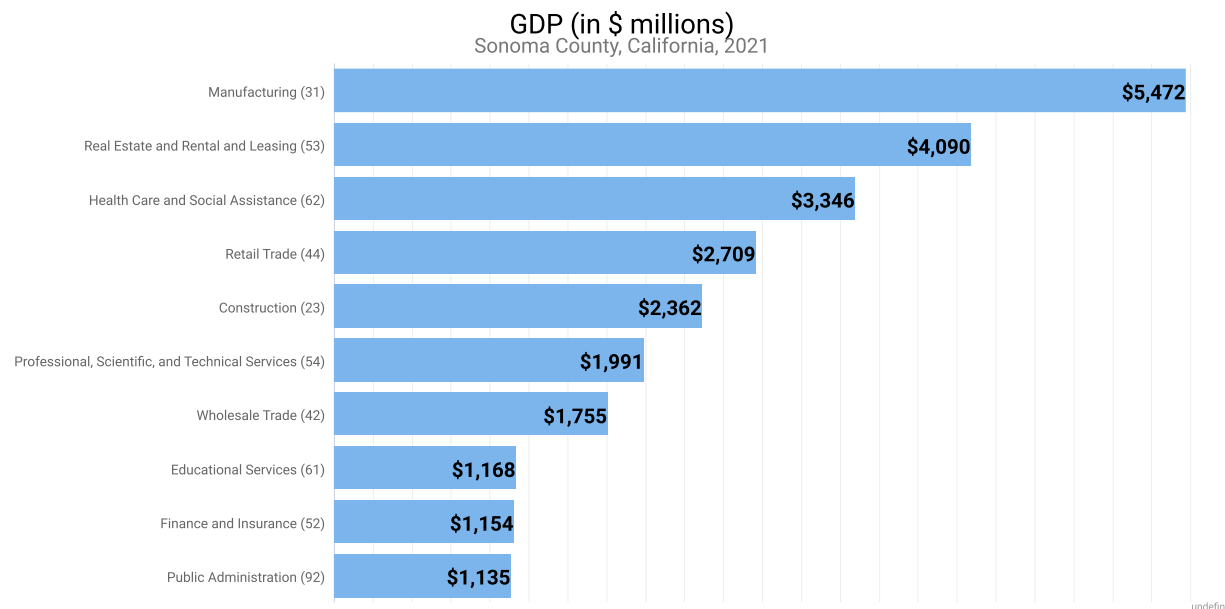
Gross Domestic Product

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2021, nominal GDP in Sonoma County, California expanded 10.2%. This follows a contraction of 3.7% in 2020. As of 2021, total GDP in Sonoma County, California was \$31,787,402,000.



Gross Domestic Product data are provided by the Bureau of Economic Analysis, imputed by Chmura where necessary, updated through 2021.

Of the sectors in Sonoma County, California, Manufacturing contributed the largest portion of GDP in 2021, \$5,472,457,000. The next-largest contributions came from Real Estate and Rental and Leasing (\$4,089,885,000); Health Care and Social Assistance (\$3,346,078,000); and Retail Trade (\$2,709,276,000).



Gross Domestic Product data are provided by the Bureau of Economic Analysis, imputed by Chmura where necessary, updated through 2021.

Sonoma County, California Regional Map



FAQ

What is a location quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is separation demand?

Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. The total projected demand for an occupation is the sum of the separation demand and the growth demand (which is the increase or decrease of jobs in an occupation expected due to expansion or contraction of the overall number of jobs in that occupation).

What is a cluster?

A cluster is a geographic concentration of interrelated industries or occupations. If a regional cluster has a location quotient of 1.25 or greater, the region is considered to possess a competitive advantage in that cluster.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.

What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 804 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 22 major groups, 95 minor groups, and 452 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

About This Report

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