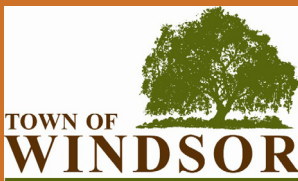# TOWN OF WINDSOR

CITY PROFILE AND PROJECTIONS REPORT

2019

Report developed by the Sonoma County Economic Development Board in partnership with the Town of Windsor and the Windsor Chamber of Commerce

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CONTENTS

EXECUTIVE SUMMARY

December 2019

Highlights from this year's report include:

• Between 2010 and 2018, Windsor's population grew annually at 0.4% reaching 27,676 residents, with a median age of 38.2 years old.

• Windsor's 2018 annual average unemployment rate was 2.69%.

• Windsor's 2018 median household income was highest in the county at $85,518 and is projected to grow by 15.4% by 2023.

• Housing vacancy rates in Windsor slowly declined to 3.3% in 2017.
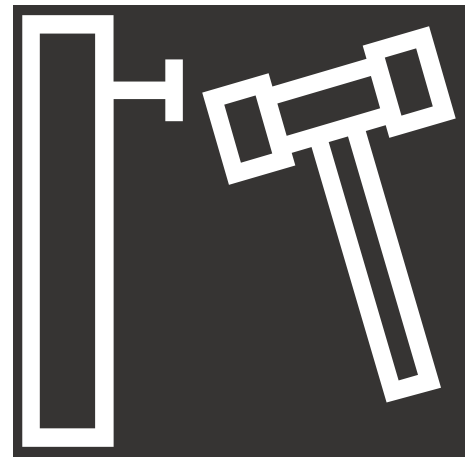
A Note from Our Executive Director

The Sonoma County Economic Development Board (EDB)—in partnership with the Sonoma County Workforce Investment Board (WIB), the Town of Windsor, and the Windsor Chamber of Commerce—is pleased to present the 2019 Town of Windsor *City Profile and Projections Report*. The EDB publishes a comprehensive annual report on each of the county's nine incorporated cities—Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, and Windsor. *These reports provide projections and forecasts for the demographic, economic, income, and housing data for each city*, and showcase some of their unique qualities and local cultures.

This report is meant to reflect conditions in the city with the most recent information available in 2019. While every effort was made to ensure this report contained up-to-date information, certain data was unavailable at the time this report was released; thus, some figures may reflect information from prior years.

Thank you for your interest in the Economic Development Board's research. For access to each of the *City Profile and Projections Reports,* or for general questions, concerns, and comments, please reach out to us at (707) 565-7170 or visit www.sonomaedb.org.

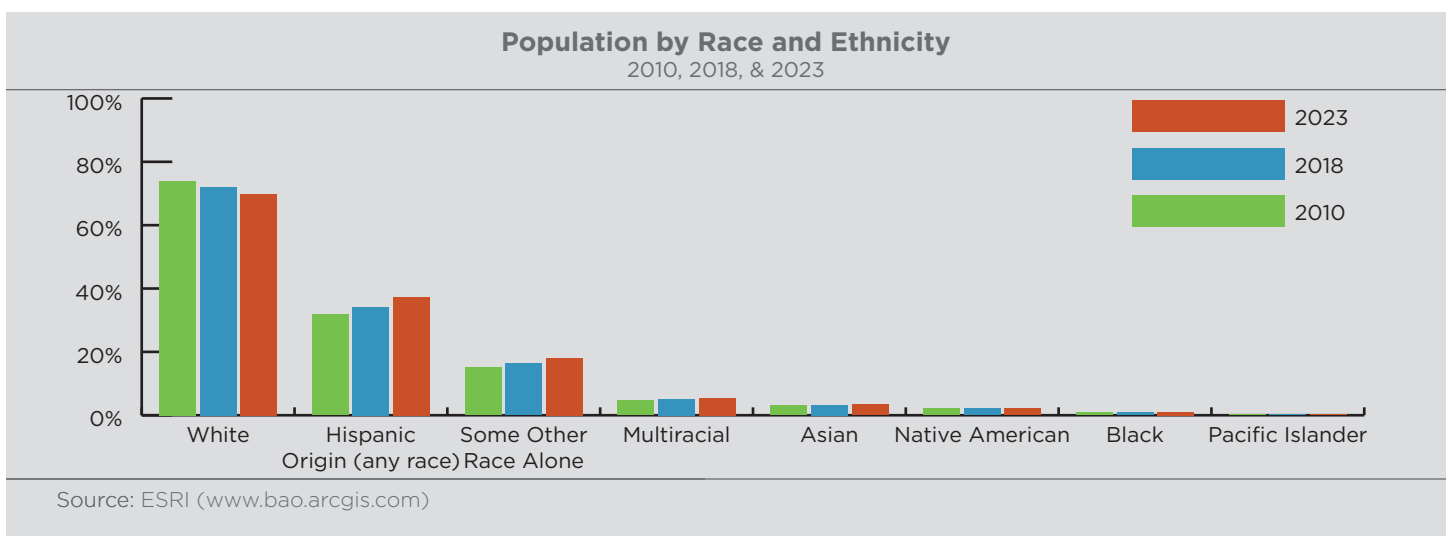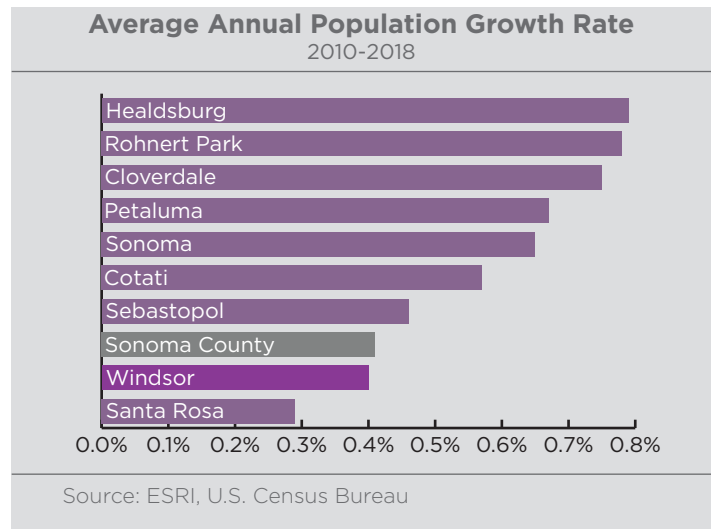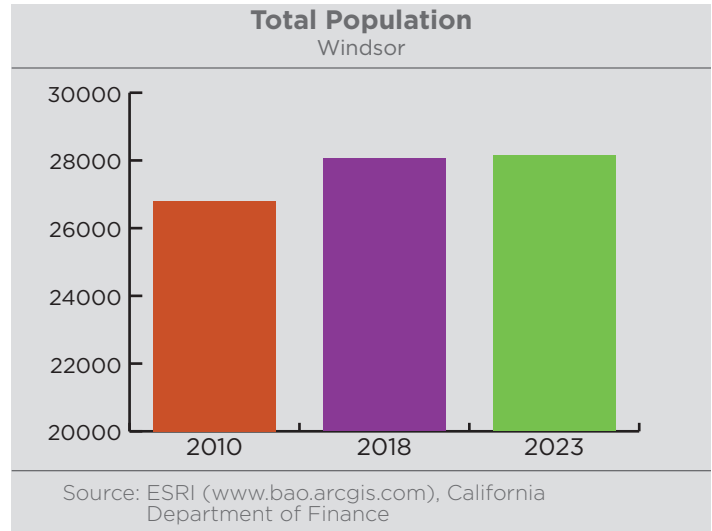*Sheba Person-Whitley*
Executive Director

DEMOGRAPHICS

POPULATION

At 27,676 residents, Windsor's 2018 population ranked as Sonoma County's fourth largest city. The city grew by 3.2% between 2010 and 2018–averaging 0.4% annually, second slowest in the County. Consistent with countywide trends, estimates show the population decreasing to 27,309 by 2023.

RACE AND ETHNICITY

In 2018, the White population comprised 72% of Windsor—of which 60.8% identify as non-Hispanic White. Meanwhile, Hispanics/Latinos (identifying as any race) comprised 31.7%, of Windsor residents. The third most prominent ethnic group at 16% identified as "Some Other Race" alone. Following countywide trends, 2023 forecasts project a declining white population and a growing Hispanic population.

Total Population
Windsor

Source: ESRI (www.bao.arcgis.com), California Department of Finance

Average Annual Population Growth Rate
2010-2018

Source: ESRI, U.S. Census Bureau

Population by Race and Ethnicity
2010, 2018, & 2023
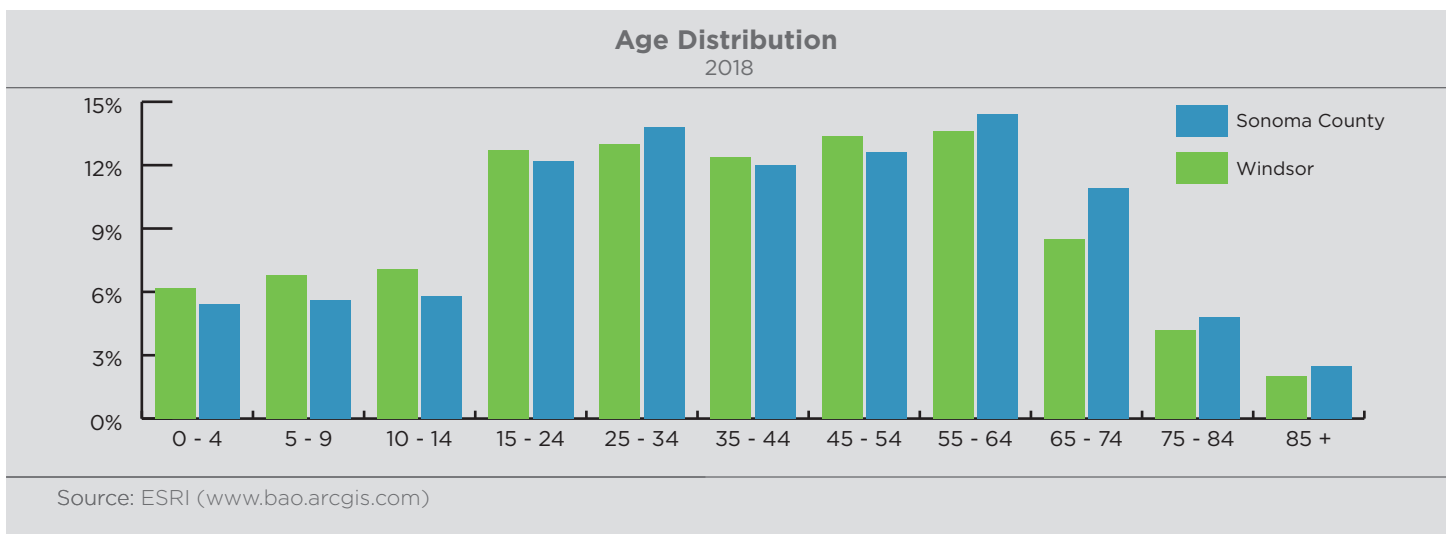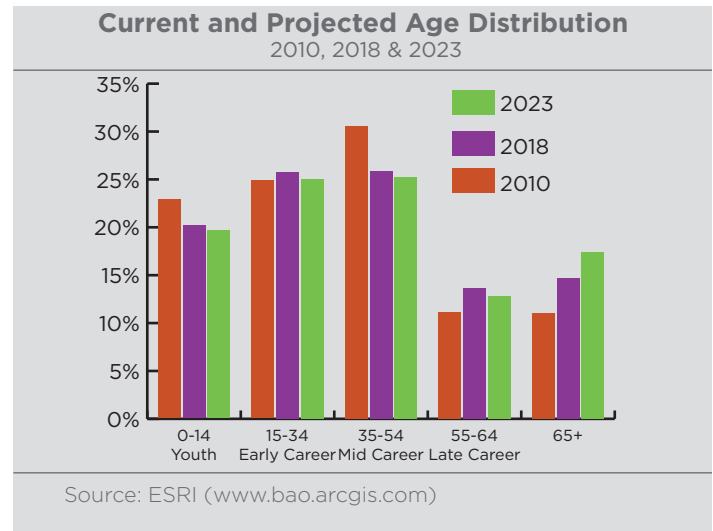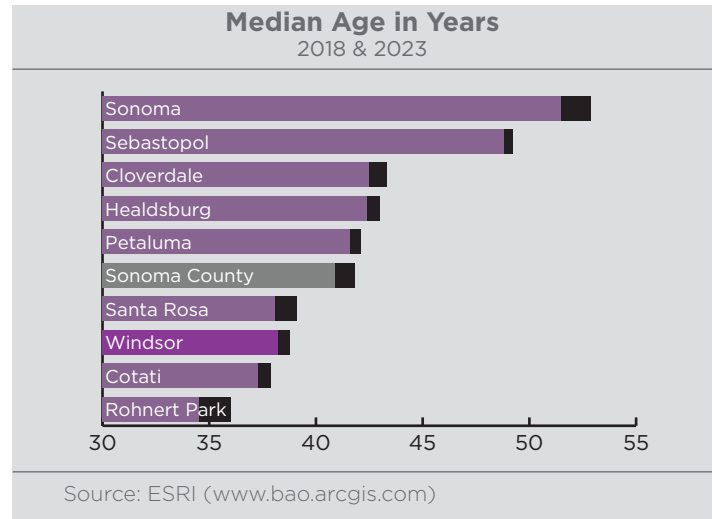
Source: ESRI (www.bao.arcgis.com)

DEMOGRAPHICS

MEDIAN AGE

Windsor's 2018 median age remained at 38.2 years, unchanged from 2017. Windsor's median age ranked third youngest among Sonoma County cities, below Sonoma County (41), but above California (36) and the U.S. (38). Forecasts project Windsor's median age to grow to 38.8 by 2023.

AGE STRUCTURE

Windsor's age distribution nearly mirrored the County, but contained a greater proportion of youth and early-career adults. Forecasts project declines in all age cohorts younger than 65. The 65+ age bracket grew by nearly 4% between 2010 and 2018, and is expected to grow by another 3% to a total proportion of 17.4% by 2023.

Median Age in Years
2018 & 2023

Source: ESRI (www.bao.arcgis.com)

Current and Projected Age Distribution
2010, 2018 & 2023

Source: ESRI (www.bao.arcgis.com)

Age Distribution
2018

Source: ESRI (www.bao.arcgis.com)

EMPLOYMENT

UNEMPLOYMENT

Fourth highest among Sonoma County cities, Windsor's 2.7% annual average unemployment rate measured below Sonoma County, California (4.2%), and the U.S. (3.7%). Consistent with countywide trends, Windsor experienced a general decline in unemployment over the last two years—contracting by 0.7% since 2017.
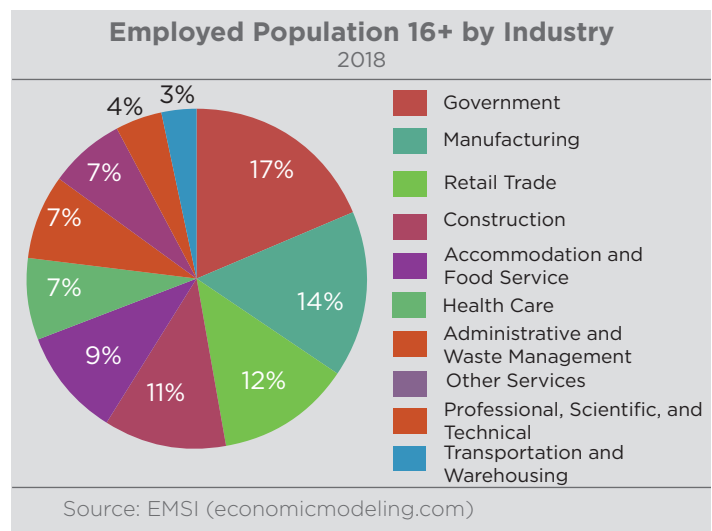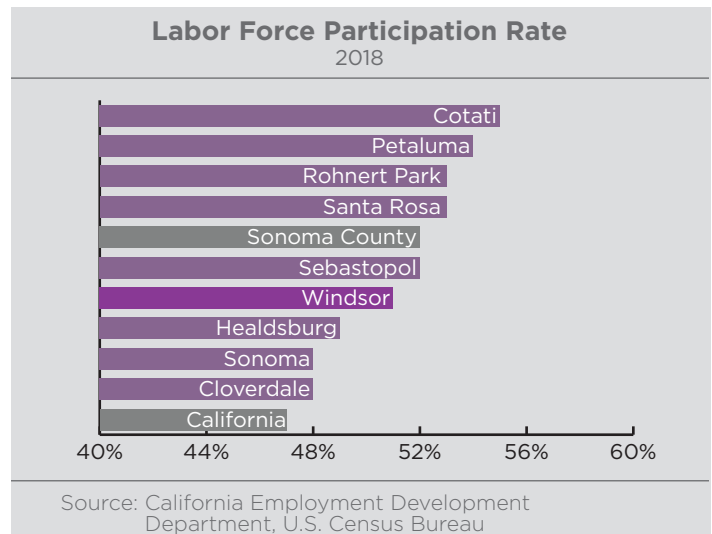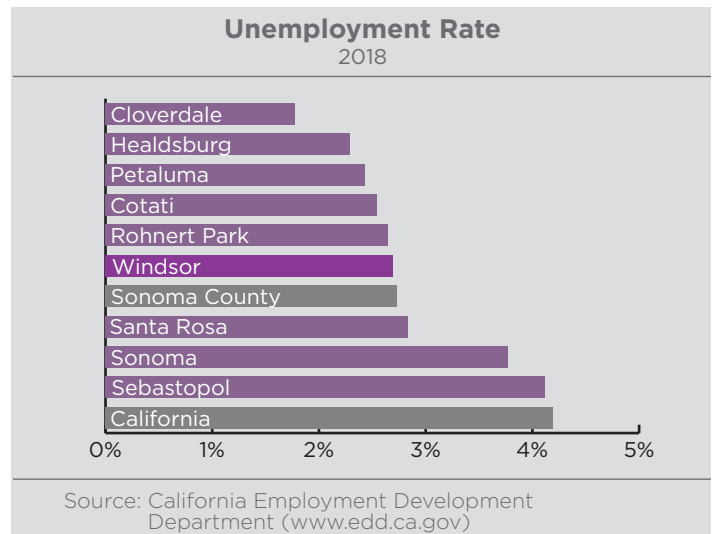
LABOR FORCE

Windsor's 51% labor force participation rate remained lower than the County, but higher than California. The labor force participation rate is calculated by dividing the number of people working or looking for work, by the total population. Stay-at-home parents, students not looking for work, retirees, and discouraged workers, are not included in the labor force. A low unemployment rate paired with a relatively lower labor force participation rate indicates an aging population.

NET COMMUTERS

In 2018, the Windsor area accommodated 9,393 jobs and 15,182 resident workers, suggesting that 5,789 workers commuted out of Windsor for their work.

INDUSTRY

Breaking down employment by industry, government employed 17% of Windsor residents. Manufacturing employed another 14%, and retail trade employed another 12%. Construction employed another 11%. hospitality, health care, administrative occupations, professional services, and other service occupations employed the remaining 46%.

Unemployment Rate
2018

Cloverdale	
Healdsburg	
Petaluma	
Cotati	
Rohnert Park	
Windsor	
Sonoma County	
Santa Rosa	
Sonoma	
Sebastopol	
California	

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

Labor Force Participation Rate
2018

Cotati	
Petaluma	
Rohnert Park	
Santa Rosa	
Sonoma County	
Sebastopol	
Windsor	
Healdsburg	
Sonoma	
Cloverdale	
California	

Source: California Employment Development Department, U.S. Census Bureau

Employed Population 16+ by Industry
2018

- Government — 17%
- Manufacturing — 14%
- Retail Trade — 12%
- Construction — 11%
- Accommodation and Food Service — 9%
- Health Care — 7%
- Administrative and Waste Management — 7%
- Other Services — 7%
- Professional, Scientific, and Technical — 4%
- Transportation and Warehousing — 3%
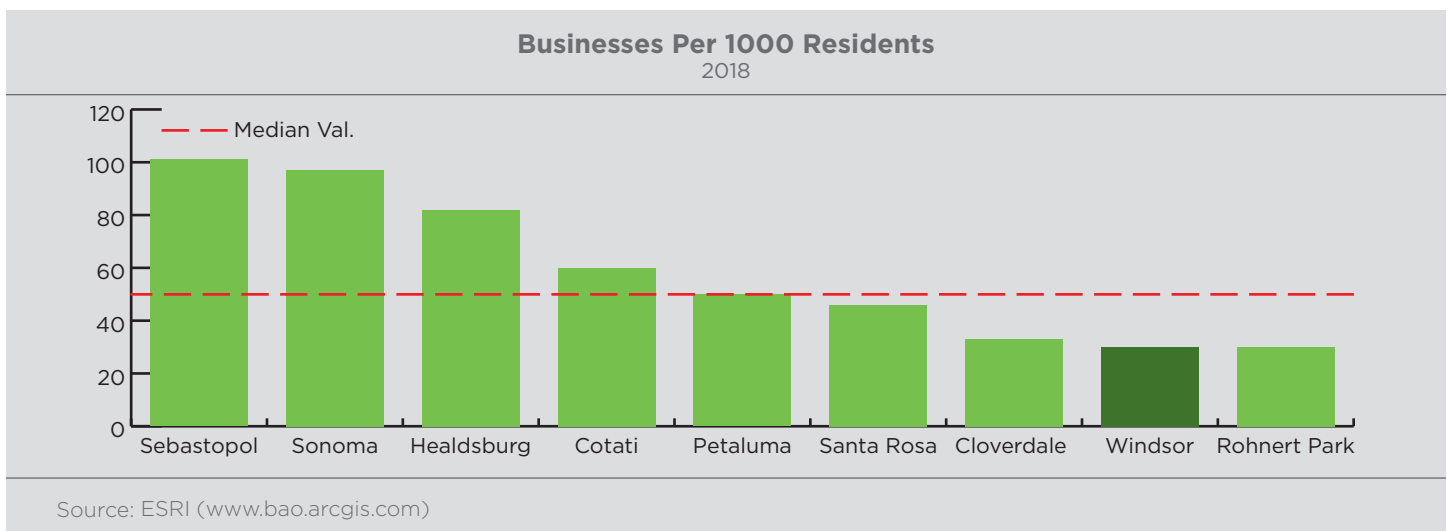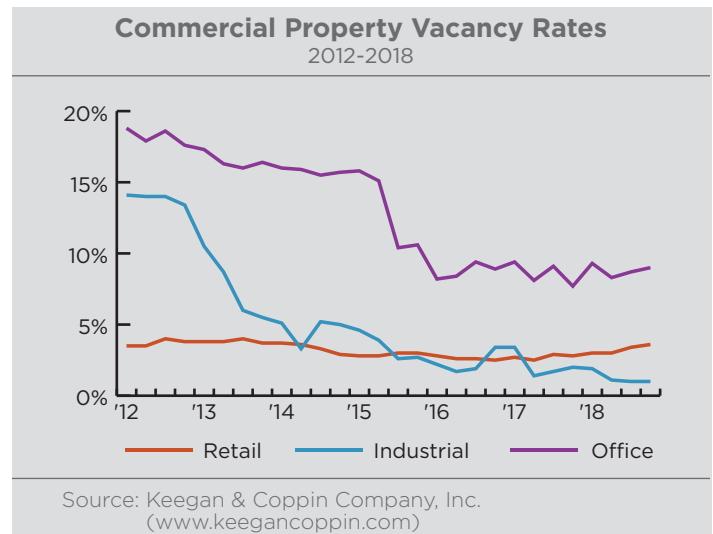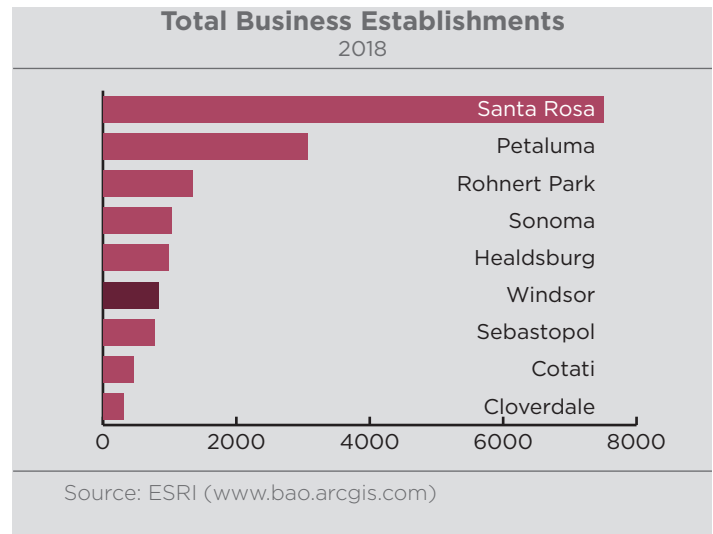
Source: EMSI (economicmodeling.com)

BUSINESS

BUSINESSES

Windsor's total number of businesses ranked fourth lowest among Sonoma County cities at 835, and the amount of businesses per resident stood second highest at 30 businesses per 1,000 residents.

COMMERCIAL VACANCY RATES

Retail, industrial, and office commercial vacancy rates indicate the amount of properties actively on the market and available for lease. While some levels of vacancy naturally develop as a consequence of friction, lower vacancy rates indicate the demand for incorporation in a particular city. While no data for Windsor alone exists, current information available describes the Airport—Windsor—Healdsburg corridor. Following the recession this area experienced declines in office and industrial vacancy rates--stabilizing around the 10% and 2% mark respectively since mid-2017. Retail space remained steady around 3-5%, a consistent trend since 2012. More flexible working conditions and requirements (telecommuting, hoteling, co-working spaces, etc.) explain relatively higher office vacancy rates, while industrial and retail spaces, due in part to their inflexible space requirements, remain in higher demand.

Total Business Establishments
2018

Source: ESRI (www.bao.arcgis.com)

Commercial Property Vacancy Rates
2012-2018

Source: Keegan & Coppin Company, Inc.
(www.keegancoppin.com)

Businesses Per 1000 Residents
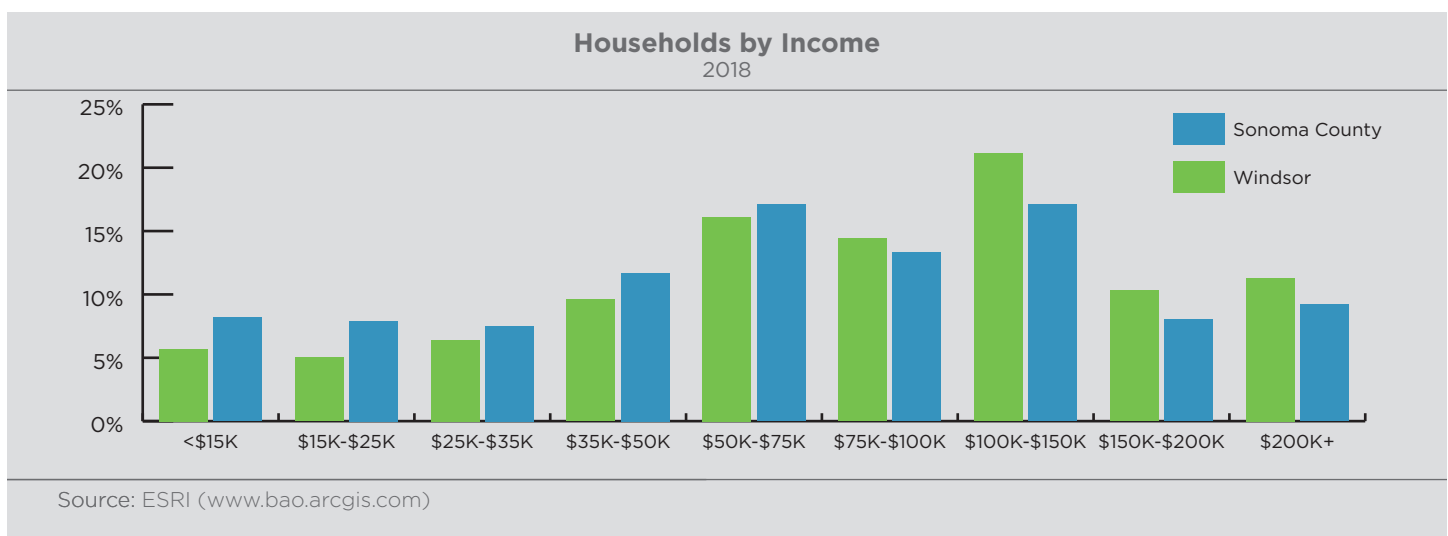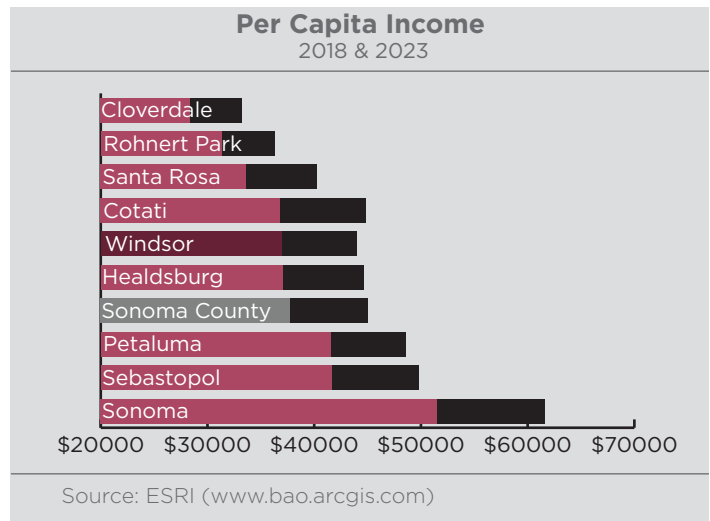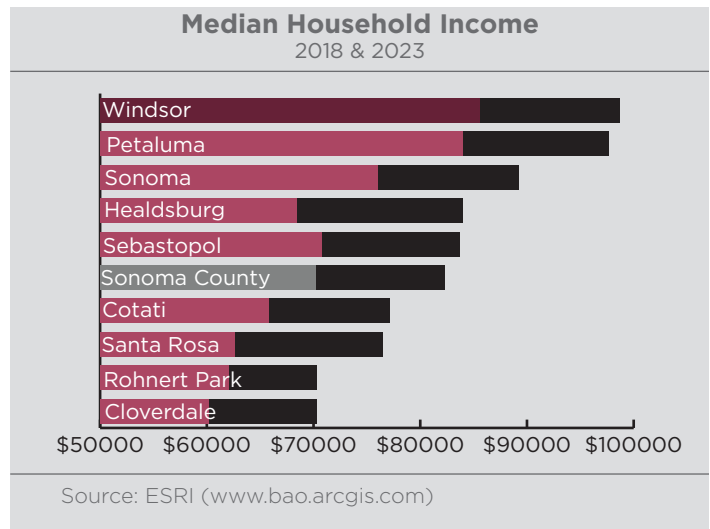2018

Source: ESRI (www.bao.arcgis.com)

INCOME & SPENDING

MEDIAN HOUSEHOLD INCOME

At $85,518—significantly above the countywide average ($70,221), Windsor's median household income ranked highest among Sonoma County cities. Moreover, 2023 forecasts project a 3% annual, or 15.4% total, increase in median household income. Projections show Windsor's per capita income growing by 3.8% annually, and 19.2% in total, from $36,955 to $44,036 in the next five years.

HOUSEHOLDS BY INCOME

Windsor residents' most common income brackets, $100,000-$150,000, stood at 21%, followed by $50,000-$75,000 at nearly 16%. While 57% of Windsor households earned less than $100,000, Windsor's household income distribution contained a greater proportion of high income earners, with 8.3% more households earning over $100,000 compared to the County.

Median Household Income
2018 & 2023

Source: ESRI (www.bao.arcgis.com)

Per Capita Income
2018 & 2023

Source: ESRI (www.bao.arcgis.com)

Households by Income
2018
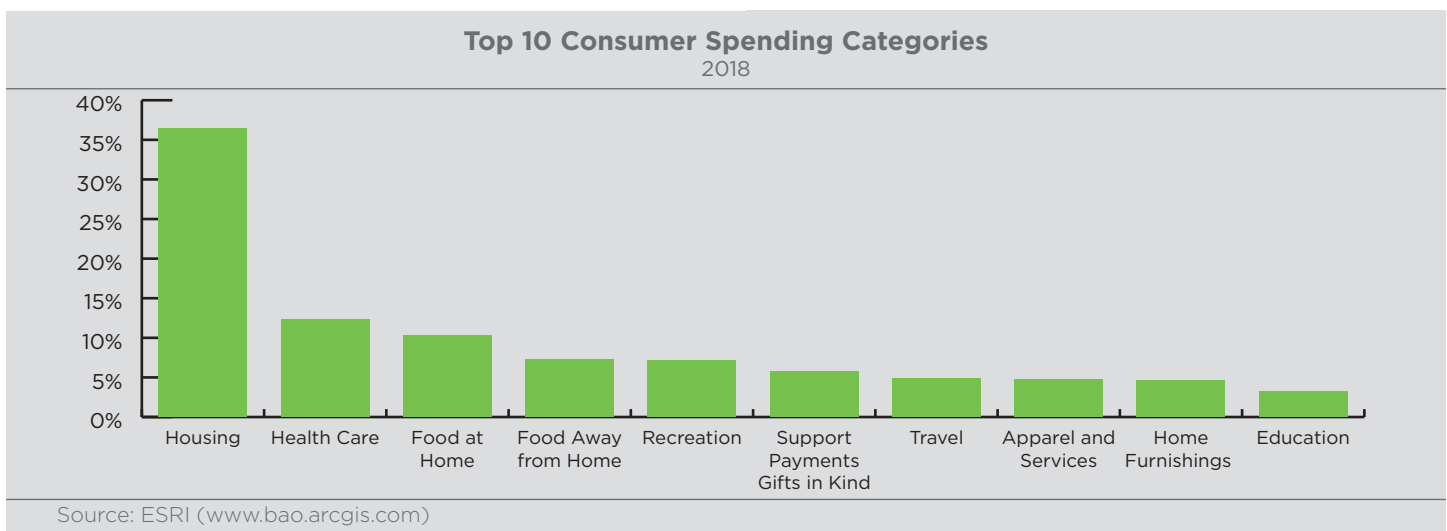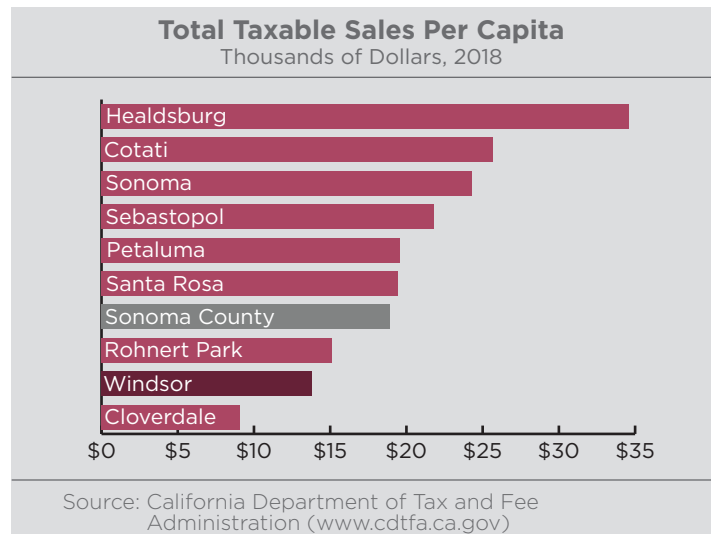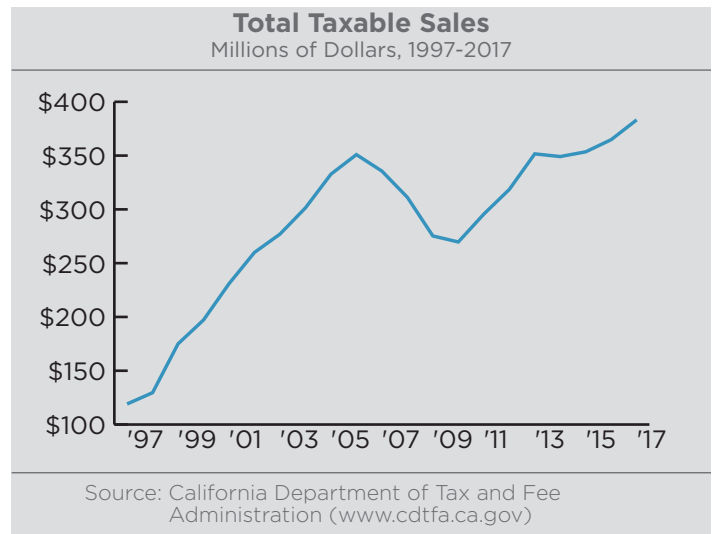

Source: ESRI (www.bao.arcgis.com)

INCOME & SPENDING

TOTAL TAXABLE SALES

Representative of local business success and residents' purchasing power, total taxable sales indicate aggregate economic health. However, because total taxable sales correlates positively with population size, examining taxable sales per capita gives deeper insight into Windsor's economy. Windsor businesses recorded $383 million in total taxable sales in 2017, a 5% increase from the previous year consistent with the post-recession economic recovery forecasts. Additionally, Windsor realized the second lowest sales per capita, at $14,000.
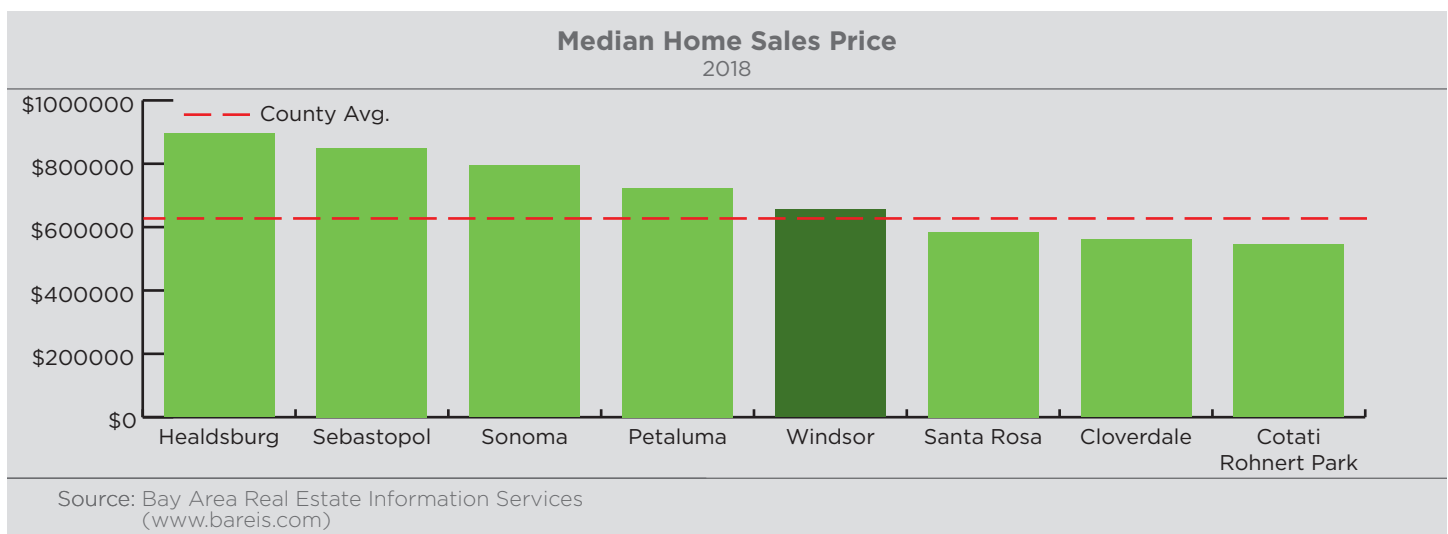
CONSUMER SPENDING

Housing comprised the greatest portion of Windsor residents' spending at 36%, followed by health care and food spending. Consumption in other categories like apparel, recreation, and education, each defined less than 10% of average consumer spending. However these percentages are averaged out across the total population and spending varies across households.

Total Taxable Sales
Millions of Dollars, 1997-2017

Source: California Department of Tax and Fee Administration (www.cdtfa.ca.gov)

Total Taxable Sales Per Capita
Thousands of Dollars, 2018

Source: California Department of Tax and Fee Administration (www.cdtfa.ca.gov)

Top 10 Consumer Spending Categories
2018

Source: ESRI (www.bao.arcgis.com)

HOUSING

HOME SALES PRICE

Ranking fifth among Sonoma County's nine cities, Windsor's median home sales price grew to $706,728 in 2018—growing 11.4% annually over five years—fifth fastest in the county.

Median Home Sales Price
1999-2017

Source: Bay Area Real Estate Information Services (www.bareis.com)

Median Home Sales Price Growth
2013-2018

Source: Bay Area Real Estate Information Services (www.bareis.com)

Median Home Sales Price
2018

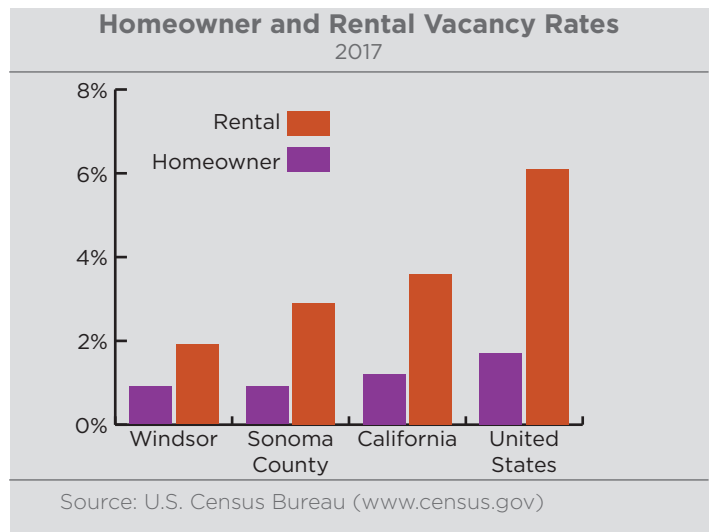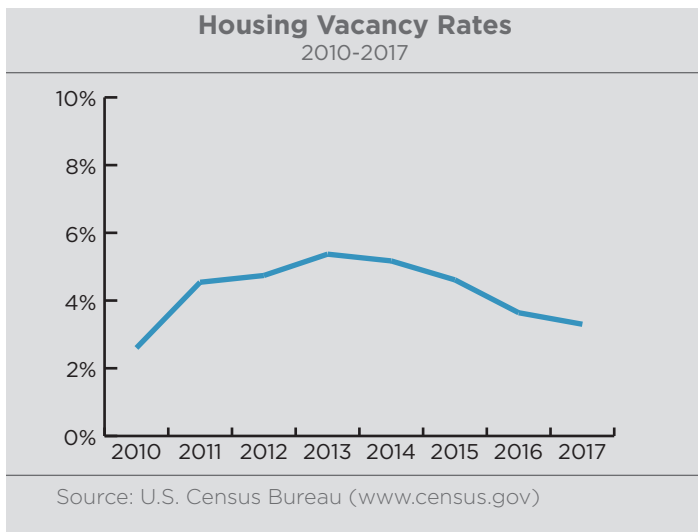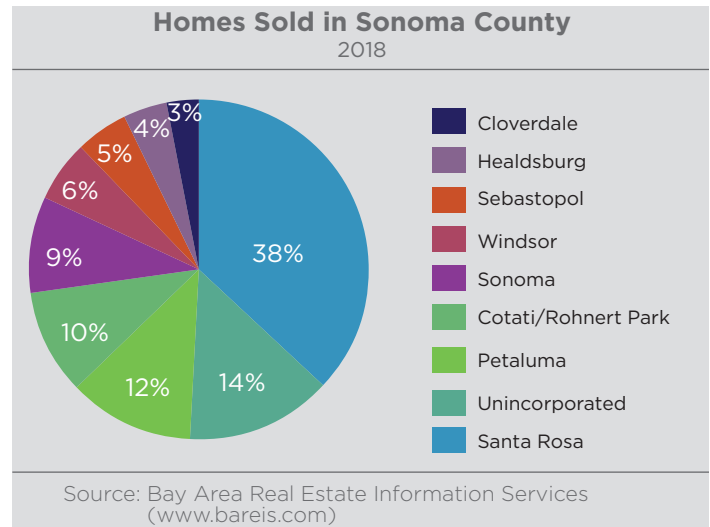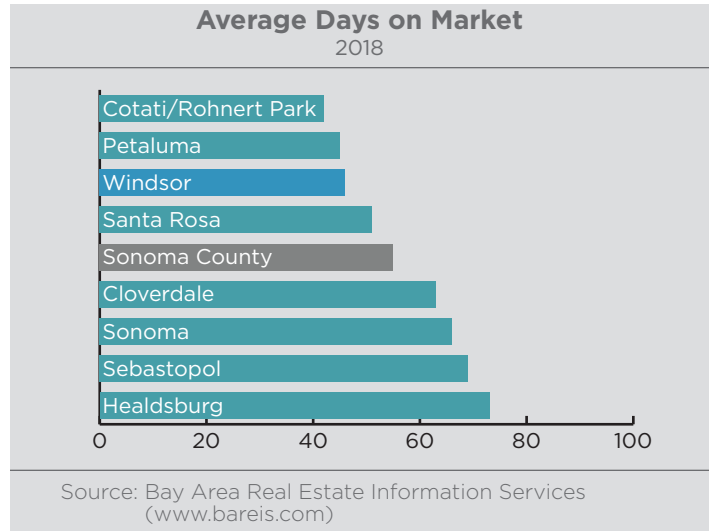Source: Bay Area Real Estate Information Services (www.bareis.com)
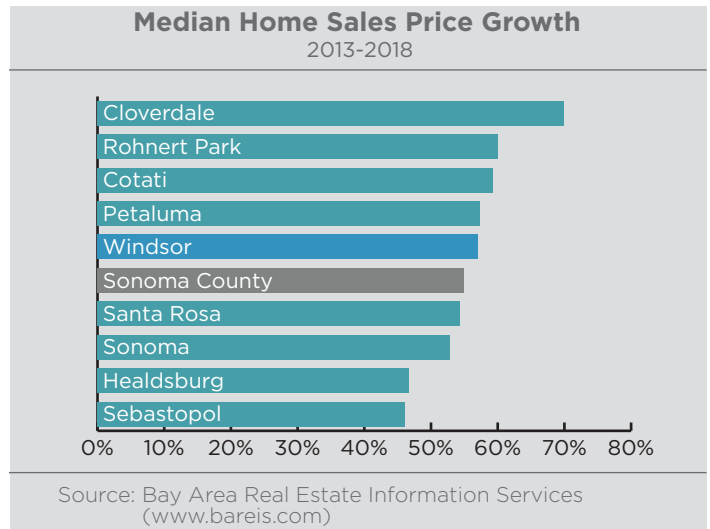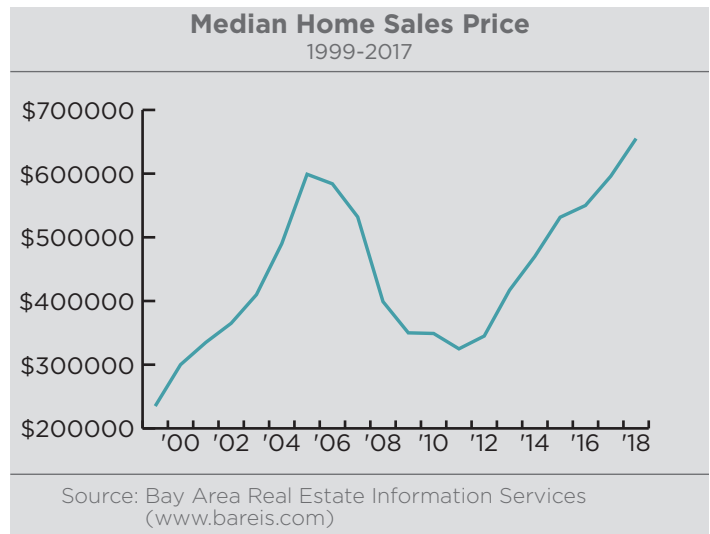
HOUSING

DAYS ON MARKET

Homes in Windsor averaged 46 days on market in 2018, indicating the third-highest housing demand in the county for the price. Concurrently, 6% of all new homes in Sonoma County were sold in Windsor.

HOUSING VACANCY RATES

Windsor's 2010-2017 Housing vacancy rate steadily declined from 5.4% in 2013 to 3.3% in 2017. Census breakdowns show homeowner vacancy rates at 1%, and rental vacancy rates around 2%. Homeowner and rental vacancy rate measures the number of homes for sale or rent on the market, and indicates market activity displaying housing demand or lack thereof. Windsor's low vacancy rates compared to the county, state, and the U.S., indicate higher housing demand.

Average Days on Market
2018

Source: Bay Area Real Estate Information Services (www.bareis.com)

Homes Sold in Sonoma County
2018

Source: Bay Area Real Estate Information Services (www.bareis.com)

Housing Vacancy Rates
2010-2017

Source: U.S. Census Bureau (www.census.gov)

Homeowner and Rental Vacancy Rates
2017

Source: U.S. Census Bureau (www.census.gov)

EDUCATION

WORKFORCE EDUCATION

Around 87% of Windsor adults (25+) possessed at least a high school diploma, lower than the County (88%), and Country (88%), but higher than the State (83%). Around 30% possessed at least a bachelor's degree, below the County (35%), the State (33.5%), but higher than the Country (32%). The proportion of Windsor adults with some college experience stood 7% higher than the state and the country, and the proportion of non-high school graduates stood lower than the county, but higher than the State and the Country.
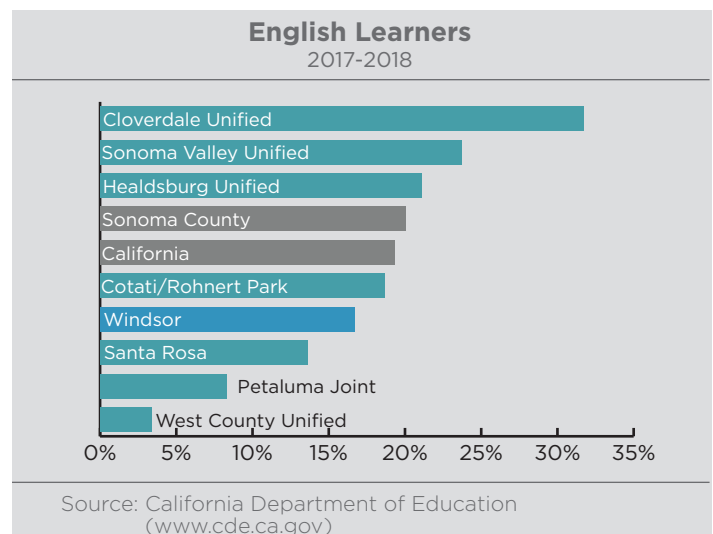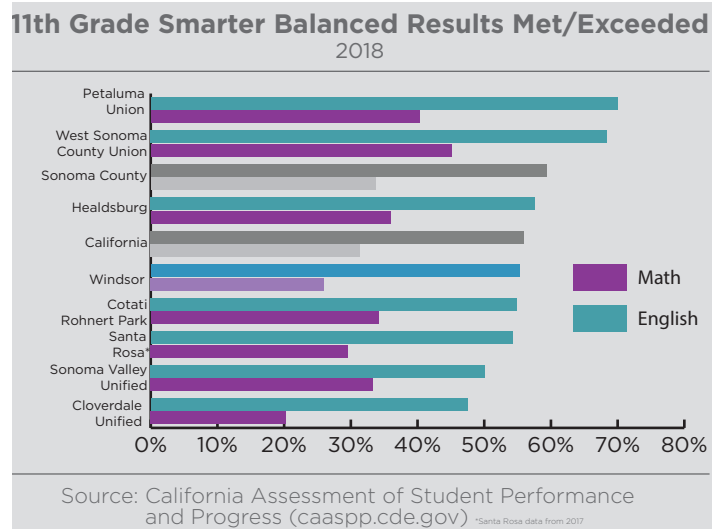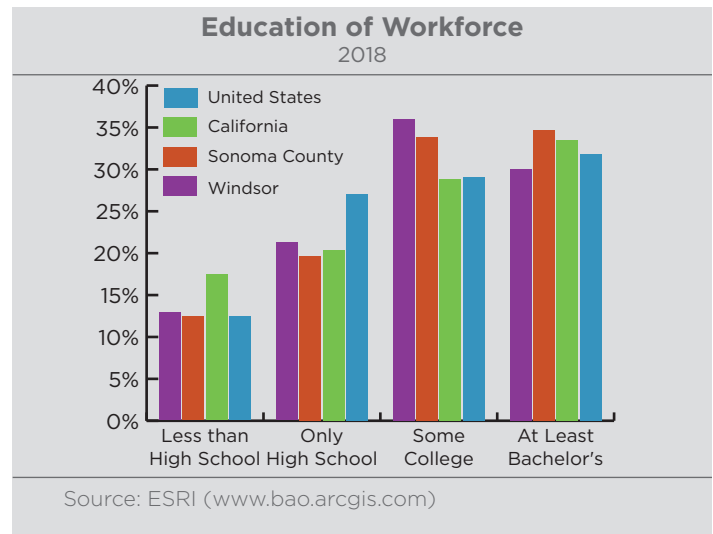
SMARTER BALANCED RESULTS

Smarter Balanced, an individual needs focused Math and English assessment system aligned to California's Common Core Standards, presents a metric for student performance across California schools for several different grades. Around 33% of Windsor 11th graders met or exceeded the standard for math, while 55% did for English.

For a list of schools located in each district, visit http://www.scoe.org/pub/htdocs/finddistrict.html.

ENGLISH LEARNERS

Around 17% of Windsor students were English learners, below County (20%) and State (19%) averages. The California Department of Education defines an "English Learner" as a student for whom English is not the spoken language at home and who has been assessed to lack a sufficient level English comprehension. Sonoma County schools allocate resources to support English Learners in becoming proficient.

Education of Workforce
2018

Source: ESRI (www.bao.arcgis.com)

11th Grade Smarter Balanced Results Met/Exceeded
2018

Source: California Assessment of Student Performance and Progress (caaspp.cde.gov) *Santa Rosa data from 2017

English Learners
2017-2018

Source: California Department of Education (www.cde.ca.gov)

CITY DATA SNAPSHOT

	Total Population	Unemployment Rate	Median Household Income	Median Home Sales Price	Total Taxable Sales	Cohort Graduation Rate
Cloverdale	9,215	2%	$60,170	$561,000	$83.7 million	86.7%
Cotati	7,633	2.9%	$65,753	$545,000	$195.8 million	76.5%
Healdsburg	12,007	2.6%	$68,432	$895,000	$415.7 million	92.1%
Petaluma	61,479	2.7%	$84,033	$723,500	$1.2 billion	88.7%
Rohnert Park	44,106	3.1%	$62,079	$545,000	$666.1 million	76.5%
Santa Rosa	169,629	3.2%	$62,620	$585,000	$3.3 billion	83.3%
Sebastopol	7,698	4.6%	$70,746	$849,750	$168 million	90.1%
City of Sonoma	11,286	4.2%	$76,015	$794,615	$274.2 million	88.2% (Sonoma Valley Unified)
Windsor	27,722	2.9%	$85,518	$655,000	$383 million	87.7%
Sonoma County	509,142	3.1%	$66,783	$635,000	$9.4 billion	83.7%

SOURCES & ACKNOWLEDGMENTS

NOTE ON DATA SOURCES

The 2019 Town of Windsor *City Profile and Projections Report* is a brief summary on various demographic, economic, and social aspects of the city. This report is meant to act as a spot-in-time profile to reflect conditions in the city in a given year. The Sonoma County Economic Development Board's (EDB) research is developed from information available from outside sources and public information as well as previously published material. The 2019 Town of Windsor *City Profile and Projections Report* offers partial or composite representations of raw data and cites' respective source datasets. For more information, please see the listed sources or contact the EDB.

All efforts have been made to ensure the accuracy of all data contained within this report, but does not guarantee its 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 2019 Town of Windsor *City Profile and Projections Report* was developed from national and local data sources. Interested readers are encouraged to contact data source agencies or organizations for further research. Readers are also invited to suggest topics for future reports by contacting the EDB.

This report was prepared by Anthony Hakim. Please direct any questions, comments, or suggestions to (707) 565-7170 or edb@sonoma-county.org.

ACKNOWLEDGMENTS

This report would not be possible without the input and collaboration of the Town of Windsor and the Windsor Chamber of Commerce.

DATA SOURCES

Bay Area Real Estate Information Services

California Board of Tax and Fee Administration

California Department of Education

California Assessment of Student Performance and Progress

California Employment Development Department

EMSI

ESRI

Keegan & Coppin, Inc.

U.S. Census

U.S. Census 2017 American Community Survey

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