



# City Profile & Projections Report

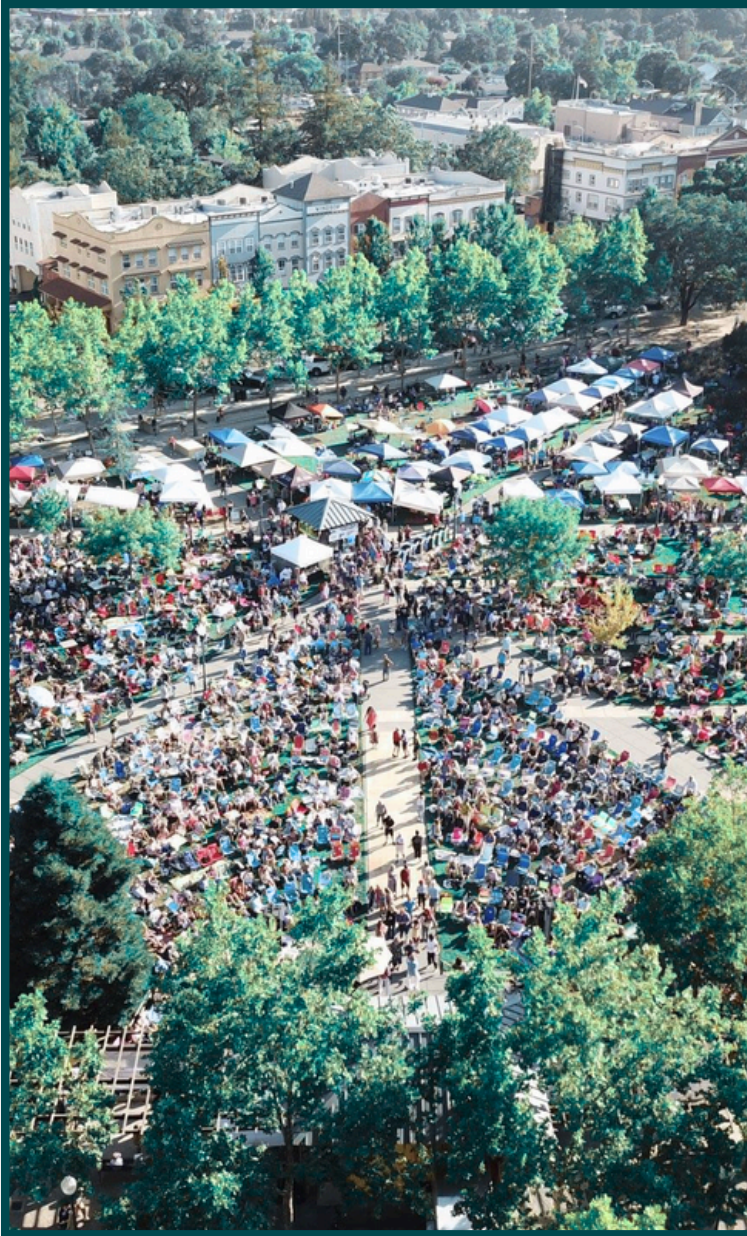
2025







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2025

# Executive Summary

## Economic Profile

Windsor, California

Windsor is entering a promising period of economic opportunity. Long known as a quiet, family-oriented community, the town is steadily growing and attracting new commercial and residential development.

## Population Recovery & Outlook

Following several years of population loss from the 2017 Tubbs Fire and the COVID-19 pandemic, Windsor has rebounded to its pre-2017 levels, reaching 26,664 residents in 2025. This recovery cements Windsor's position as the fourth-largest city in Sonoma County. While moderate population decline is projected beyond 2025 and into 2030, the town's demographic and economic fundamentals point to a community well-positioned to attract all the ingredients for sustained economic development: tourists, residents, and commercial investment.

## Employment Base

A defining feature of Windsor's transformation is its balance between small-town character and economic diversification. As of Q3 2025 (Jul, Aug, Sept), Windsor maintains one of the lowest unemployment rates in Sonoma County at 3.3%, supported by a broad employment base.

Health care leads local industries, accounting for 15.6% of total employment, followed closely by construction and manufacturing, each comprising nearly 10% of Windsor's workforce. This blend of service-based and goods-producing sectors reflects a healthy, adaptable economy capable of withstanding regional slowdowns.

## Opportunities for Local Employment Expansion

Despite this strength, Windsor's economy still experiences significant employment leakage, with over 7,200 local jobs and thousands of residents commuting to nearby hubs such as Santa Rosa, Marin County, and San Francisco. This dynamic underscores the opportunity for Windsor to expand its internal employment base through targeted business attraction and infrastructure investment.



Encouragingly, Windsor is already making progress in this area. Between 2023 and 2025, the town recorded an average 2.1% increase in total businesses, the only incorporated city in Sonoma County to post gains during that period.

This growth is supported by low commercial vacancy rates, affordable office space, and a steady pipeline of over 2,000 new residential units. Together, these factors indicate Windsor's evolution into a more self-sustaining local economy: one that offers both a high quality of life and expanding market opportunities for entrepreneurs and employers alike.

## Demographic and Consumer Momentum

Beyond its employment composition, Windsor's demographic profile fuels additional economic momentum. With the highest median household income in Sonoma County, projected to reach \$152,934 by 2030, and a homeownership rate of 76.8%, the town's residents are both financially well positioned and deeply invested in the community.

## Conclusion: From Recovery to Resurgence

In short, Windsor's 2025 economic landscape reflects a community in transition, one from recovery to resurgence. Its stable population, rising incomes, expanding business base, and strategic location between Sonoma County's industrial and tourism corridors position Windsor as a prime destination for targeted investment and long-term economic growth.



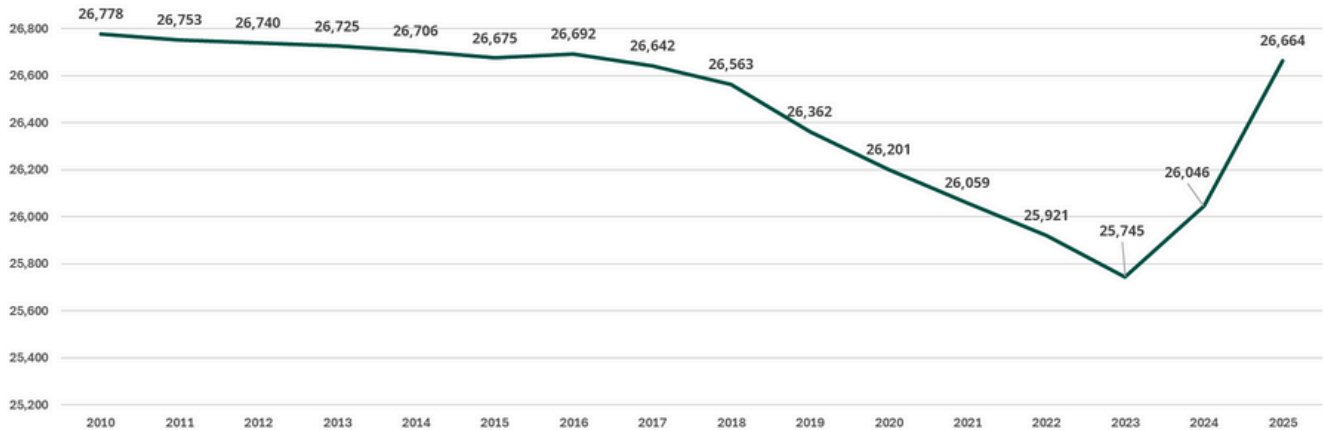




# BIG EVENTS. SMALL TOWN.

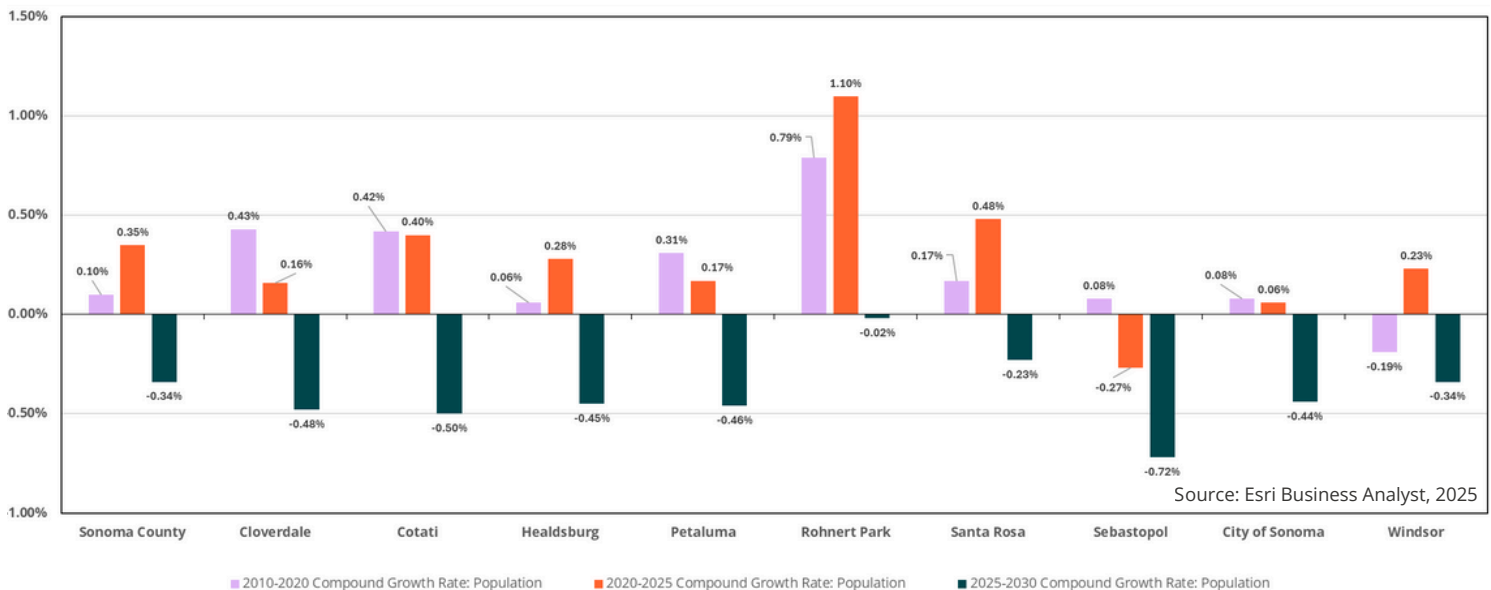


## Windsor Population (2010-2025)



Sources: U.S. Census Bureau & Esri Business Analyst, 2025

## Compound Population Growth Rates: Sonoma County and Its Nine Cities (2010-2020, 2020-2025, 2025-2030)

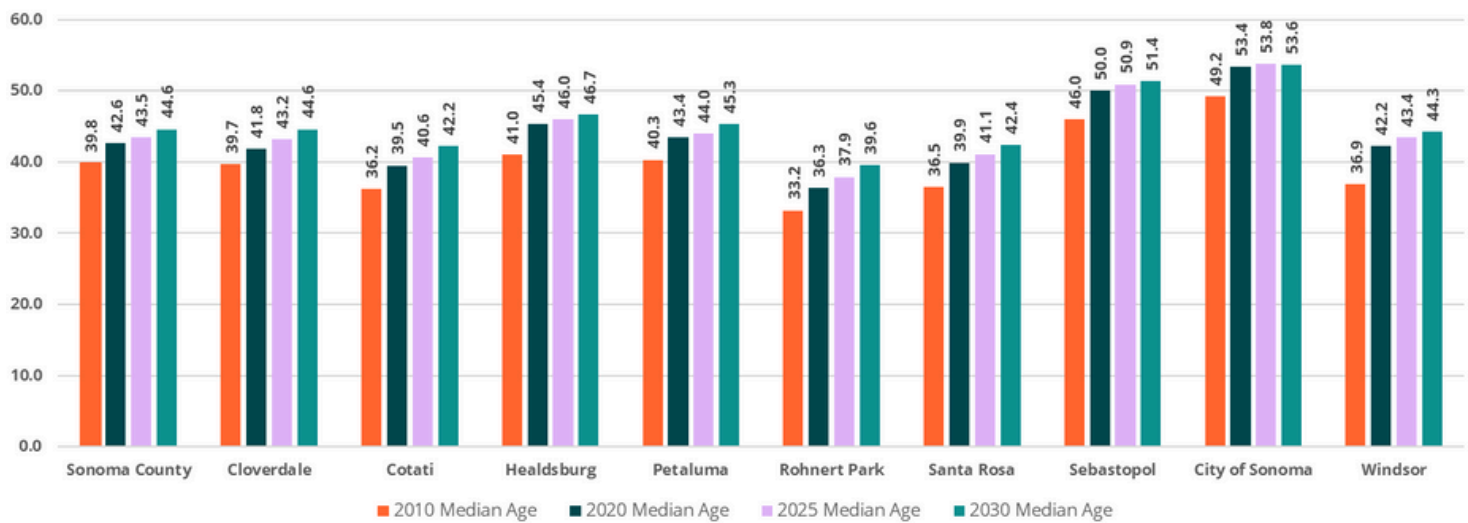


### Core Takeaways:

Following a 10-year average population growth rate of -0.19%, the only negative compound growth rate among Sonoma County's nine cities and well below the countywide average of 0.10%, Windsor has experienced modest yet positive growth over the past five years (2020-2025), averaging 0.23%. This recent uptick is largely attributed to the strong rebound between 2023 and 2025, which offset population losses from the preceding three years. However, Windsor's 5-year growth rate remains below the county average of 0.35%, ranking fifth among the nine cities. Looking ahead, Windsor is projected to experience additional, though moderate, population decline between 2025 and 2030, with an anticipated compound annual growth rate of -0.34%. Based on these projections, Windsor's population in 2030 is expected to total approximately 26,211 residents.



## Past, Current, and Forecasted Median Age Sonoma County & Its Nine Cities (2010, 2020, 2025, 2030)



Sources: U.S. Census Bureau & Esri Business Analyst, 2025

### Windsor 2025 Median Age

43.4

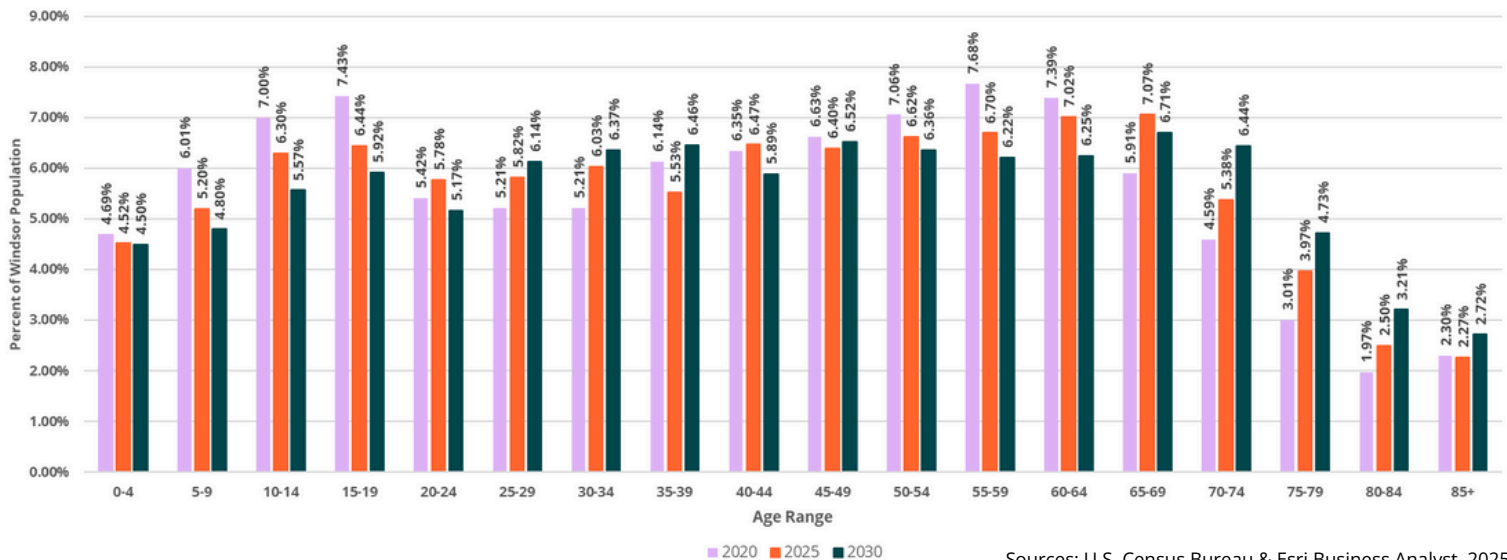
### Nine-City Average 2025 Median Age

44.5

### Highlights:

Windsor, like the county and its eight other cities, reflects a broader regional trend of an aging population. Between 2010 and 2020, Windsor's median age increased more sharply than any other jurisdiction, rising by 6.2 years from 36.9 to 42.2, representing a 14.36% increase. Since then, the town's pace of aging has aligned with countywide and citywide patterns, with the residents' median age increasing by approximately 0.5 to 1.5 years every five years. The sole exception to this trend is the City of Sonoma, which is projected to experience a slight decline in median age—from 53.8 to 53.6 years—between 2025 and 2030. As of 2025, Windsor ranks as the fifth youngest city in Sonoma County, with a median age of 43.4, and is forecasted to become the fourth youngest by 2030, surpassing Petaluma.

## Age Distribution of Windsor's Population: Historical and Projected Trends (2020, 2025, 2030)



### Primary Insights:

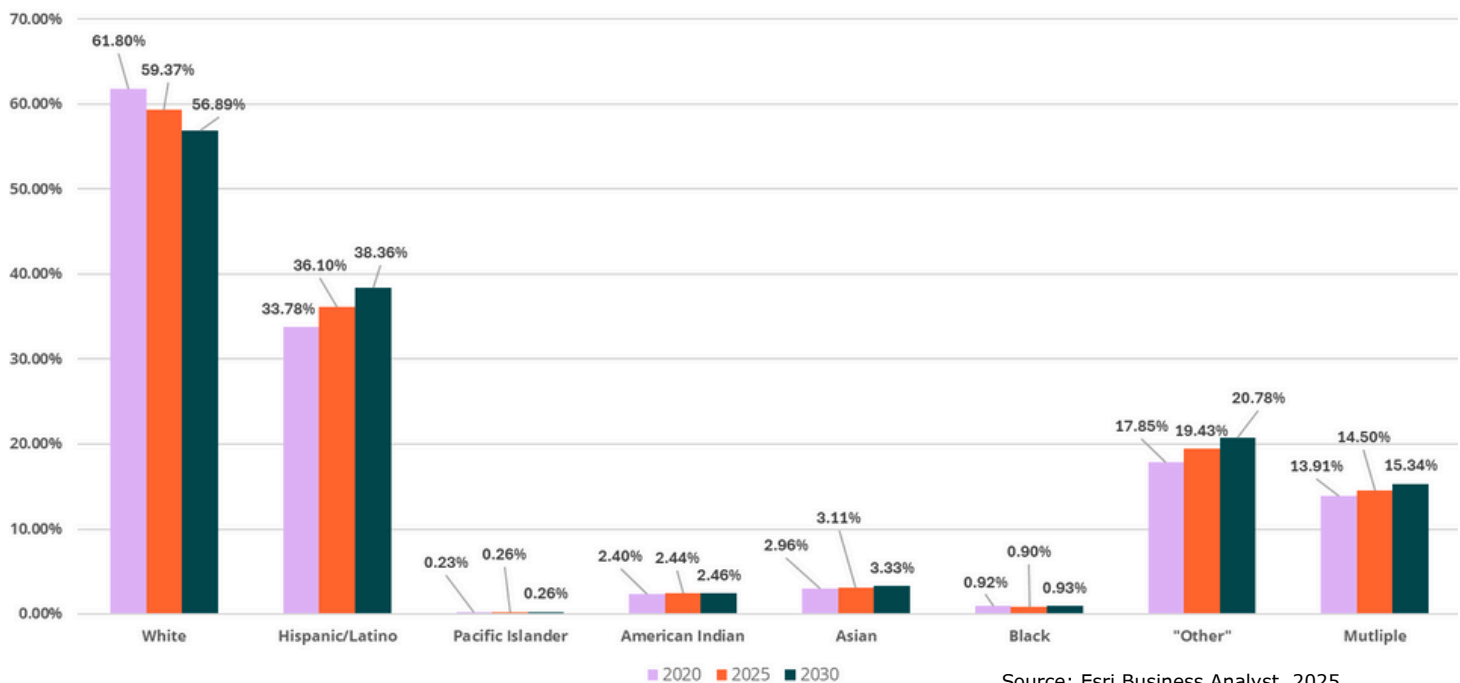
The chart shows Windsor's population distribution by age for 2020, 2025, and 2030, highlighting a gradual aging trend over the decade. Younger cohorts, such as ages 0–14, are projected to decline slightly from 4.7–7.0% in 2020 to 4.5–5.6% by 2030, reflecting slower youth population growth. In contrast, older age groups—particularly those aged 65–84—are expected to increase noticeably, with the 70–74 cohort rising from 4.6% in 2020 to 6.4% by 2030, and the 80–84 cohort growing from 2.0% to 3.2% over the same period. Middle-aged groups (40–64) remain relatively stable, suggesting Windsor's population is gradually shifting toward an older age structure consistent with regional demographic patterns.







## Racial Composition of Windsor 2020, 2025, and 2030 Trends and Projections



Source: Esri Business Analyst, 2025

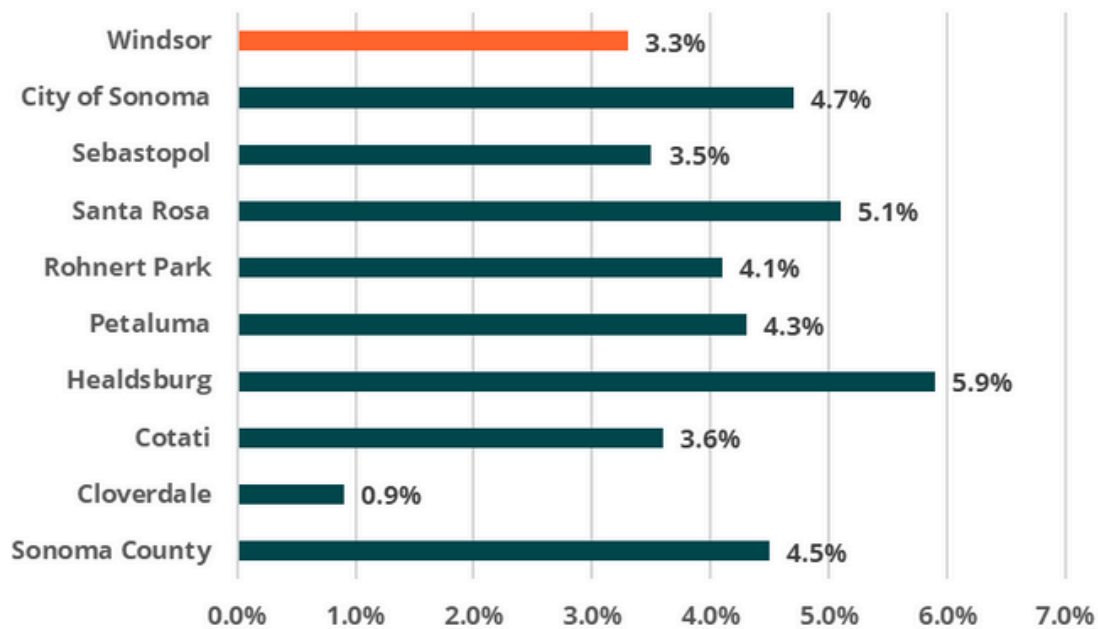
Note: Percentages may exceed 100% because individuals can identify with more than one race.



### Takeaways:

Windsor's racial composition is gradually becoming more diverse, with the town's Hispanic/Latino population growing most considerably, reflecting trends seen across Sonoma County's nine cities. Between 2020 and 2030, the White population share is projected to decline from 61.8% to 56.9% (-4.9%), while the Hispanic/Latino population is expected to grow from 33.8% to 38.4% (+4.6%). Smaller increases are also projected among residents identifying as "Multiple" or "Other" races. These shifts suggest Windsor, like much of the county, is experiencing steady diversification as younger, more racially mixed generations replace older populations.

## Unemployment Rate (2025)



Source: CA Employment Development Department (EDD), 2025

### Key Trends:

Windsor's unemployment rate of 3.3% remains one of the lowest in Sonoma County, only behind Cloverdale. This trend signals a strong local economy and strategic geographic location within Sonoma County, which has been fostered by steady business expansion, new residential and commercial construction, and low commercial vacancy rates. As a result, Windsor continues to demonstrate positive economic momentum and resilience in its labor market.

### Commuter Profile:

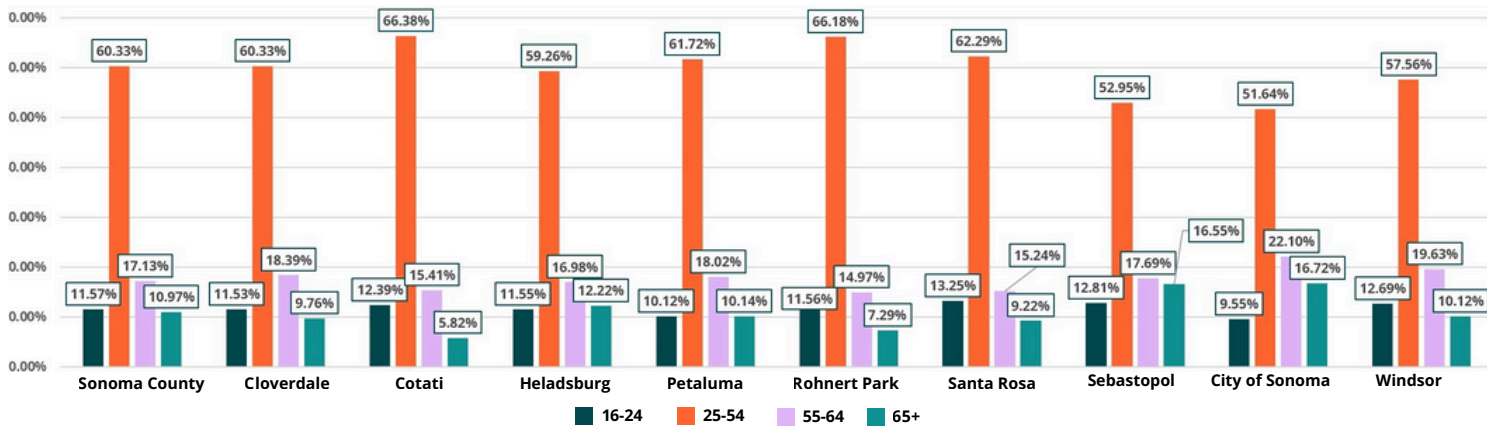


As of 2025, **Windsor supports 7,269 local jobs** and is **home to 15,025 employed residents**, indicating that **at least 7,756 residents commute outside the town for work**. This significant outflow of workers suggests that while Windsor enjoys low unemployment, it still functions primarily as a residential community within the broader Sonoma County economy, with many residents employed in nearby cities such as Santa Rosa or beyond. While this dynamic reflects Windsor's appeal as a place to live, it also highlights an ongoing opportunity for the town to expand its local employment base.





## Labor Force Composition by Age Group (2025)

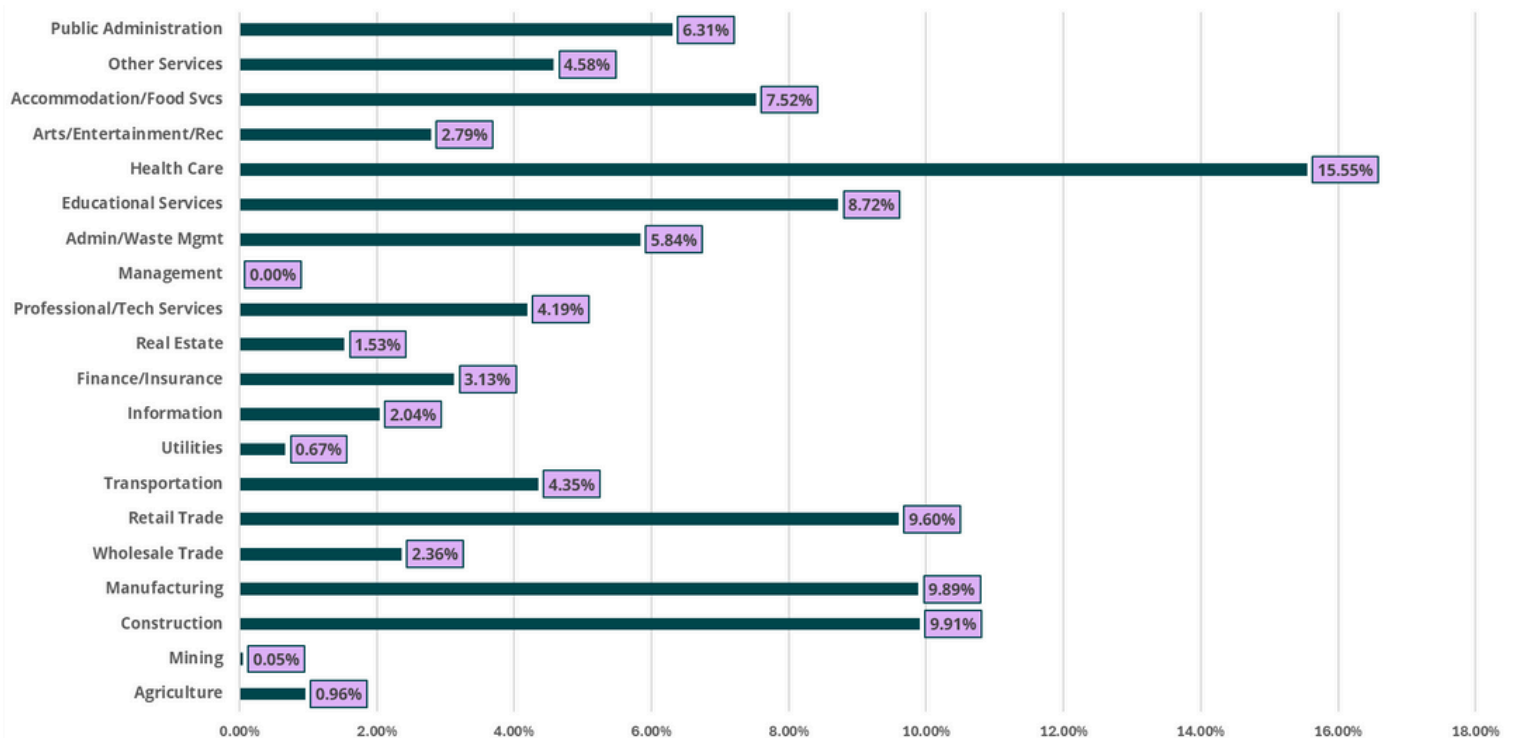


Source: CA Employment Development Department (EDD), 2025

### Analysis:

In 2025, Windsor's labor force is predominantly made up of individuals aged 25–54, representing 57.6% of its total civilian labor population, which is slightly below the countywide average of 60.3%. The 16–24 age group accounts for 12.7%, indicating a modest presence of younger workers, while 19.6% of Windsor's workforce is aged 55–64, suggesting an experienced mid-career cohort that remains active in the labor market. The town's relatively balanced distribution across age groups, paired with its low unemployment rate and continued business growth, points to a stable local economy.

## Employment by 2-Digit NAICS Industry, Town of Windsor (2025)



Source: Esri Business Analyst, 2025

## Employment Trends Report:

The largest employment sector—Health Care and Social Assistance at 15.55%—demonstrates Windsor's alignment with countywide growth in medical, outpatient, and supportive services. This is largely driven by an aging population, rising demand for home-based care, and continued expansion of regional health networks. Combined with Educational Services, which accounts for 8.72% of employment, these sectors illustrate the strength of Windsor's essential service backbone, supported by schools, childcare providers, and public institutions that offer consistent, year-round jobs.

Windsor's service core is balanced by a strong goods-producing base. Construction makes up 9.91% of local employment, reflecting ongoing residential development and infrastructure reinvestment. Manufacturing closely follows at 9.89%, underscoring Windsor's role in Sonoma County's specialized production ecosystem. This includes beverage manufacturing, bottling, packaging, and related equipment production, much of which is concentrated in Windsor's industrial areas and supports the region's wine and craft beverage industries.

Consumer-facing sectors add another important dimension to Windsor's economy. Retail Trade (9.60%) benefits from Windsor's position as a commercial space for surrounding neighborhoods, while Accommodation and Food Services (7.52%) draw strength from both local residents and steady tourism activity tied to wine country attractions and regional events.

Together, these sectoral strengths show that Windsor's economy rests on a stable combination of essential public services, durable industrial activity, and a healthy retail and hospitality market—providing resilience and balanced growth potential.

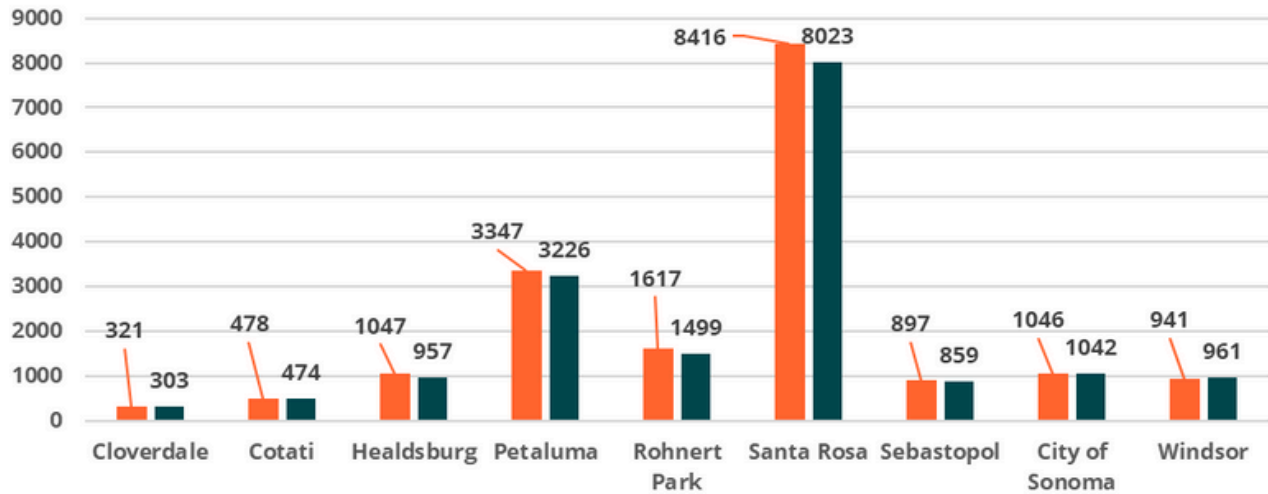
# OVER 1 IN 3

***of those employed in Windsor work  
in either health care, construction,  
or manufacturing.***



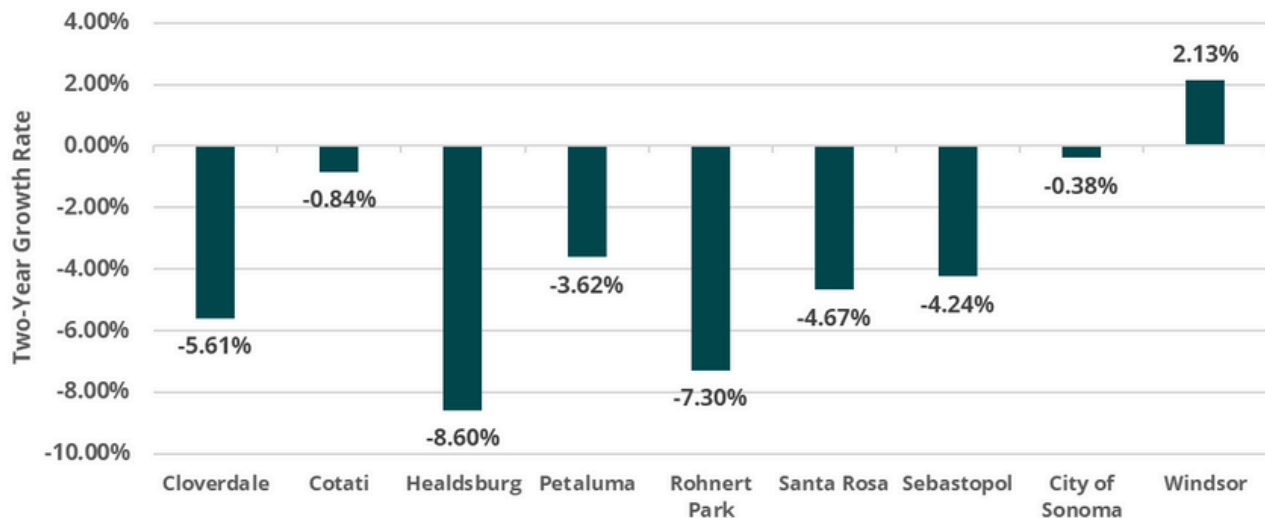


## Number of Businesses by Sonoma County City (2023, 2025)



Sources: 2023 City Snapshots (EDC); Esri Business Analyst, 2025

## Avg. 2 Year Change in Number of Businesses by Sonoma County City (2023-2025)

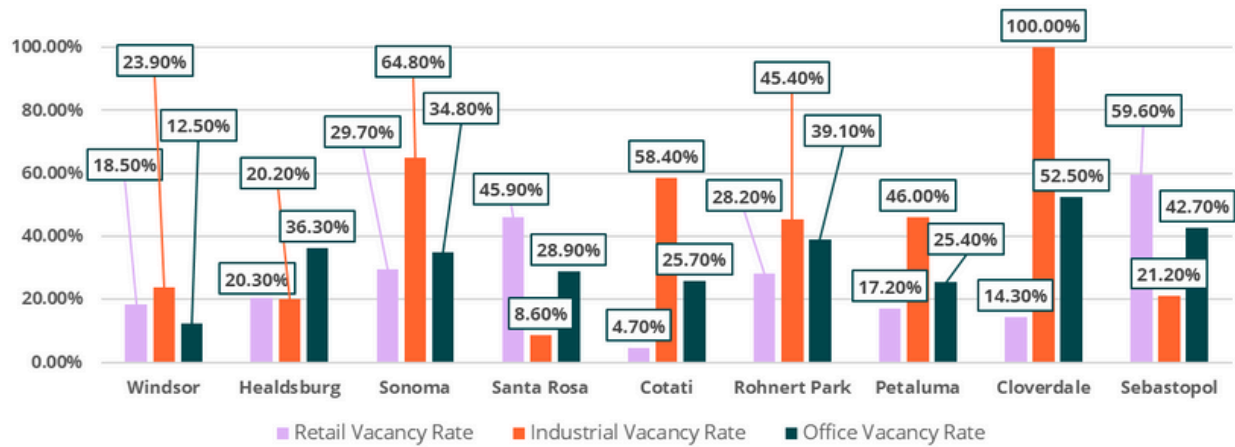


Sources: 2023 City Snapshots (EDC); Esri Business Analyst, 2025

### Trends Analysis:

Between 2023 and 2025, Windsor experienced a 2.1% increase in total businesses, rising from 941 to 961. Windsor is therefore the only city in Sonoma County to record positive growth during this period. In contrast, most other jurisdictions, including Santa Rosa (-4.7%) and Healdsburg (-8.6%), experienced significant declines in business activity. While Windsor's total number of businesses remains modest, this growth trajectory signals a positive consumer sentiment that is fueling a growing local economy. Positive trends, including low commercial vacancy rates, new development projects, and a stable employment base, indicate that Windsor's smaller business community may be well-positioned for continued expansion and resilience relative to the broader county.

## Commercial Property Vacancy Rates by City: Retail, Industrial, and Office (Q3 2025)

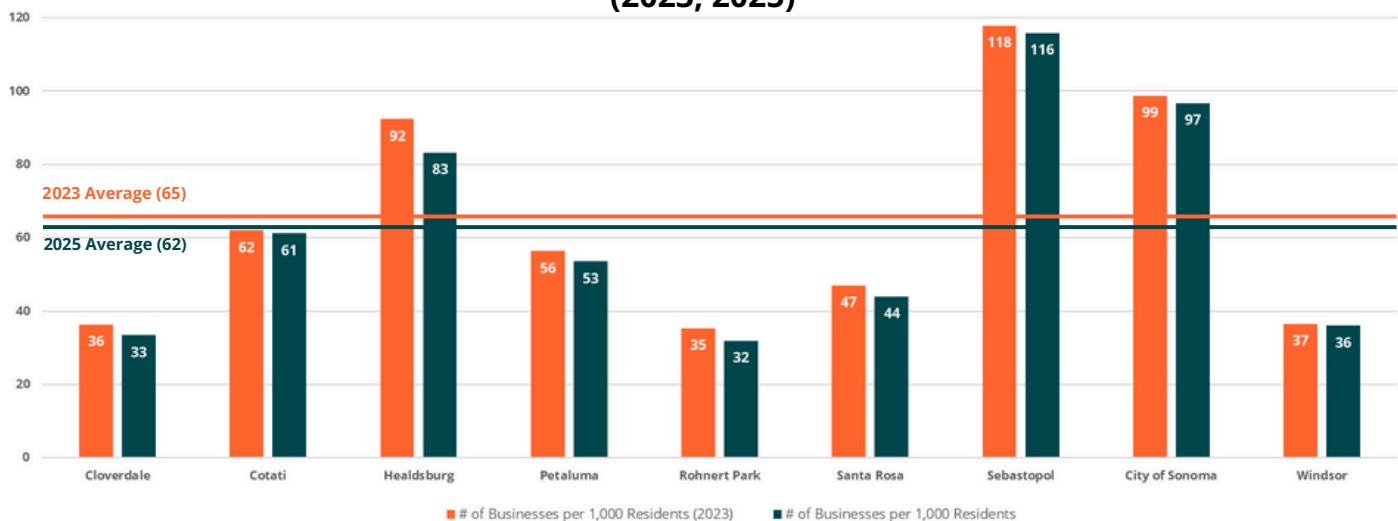


Source: CoStar, Q3 2025

### Primary Takeaways:

Windsor's strong business performance between 2023 and 2025 is supported by relatively low commercial vacancy rates across all sectors. As of the third quarter (July, August, September) 2025, Windsor reported a retail vacancy rate of 18.5%, industrial vacancy rate of 23.9%, and office vacancy rate of 12.5%—figures that remain competitive compared to most other Sonoma County jurisdictions. These balanced vacancy levels indicate consistent market demand and suggest that commercial spaces in Windsor are being effectively utilized to support local economic activity.

## Business Density per 1,000 Residents in Sonoma County's Nine Cities (2023, 2025)



Sources: 2023 City Snapshots (EDC); Esri Business Analyst, 2025

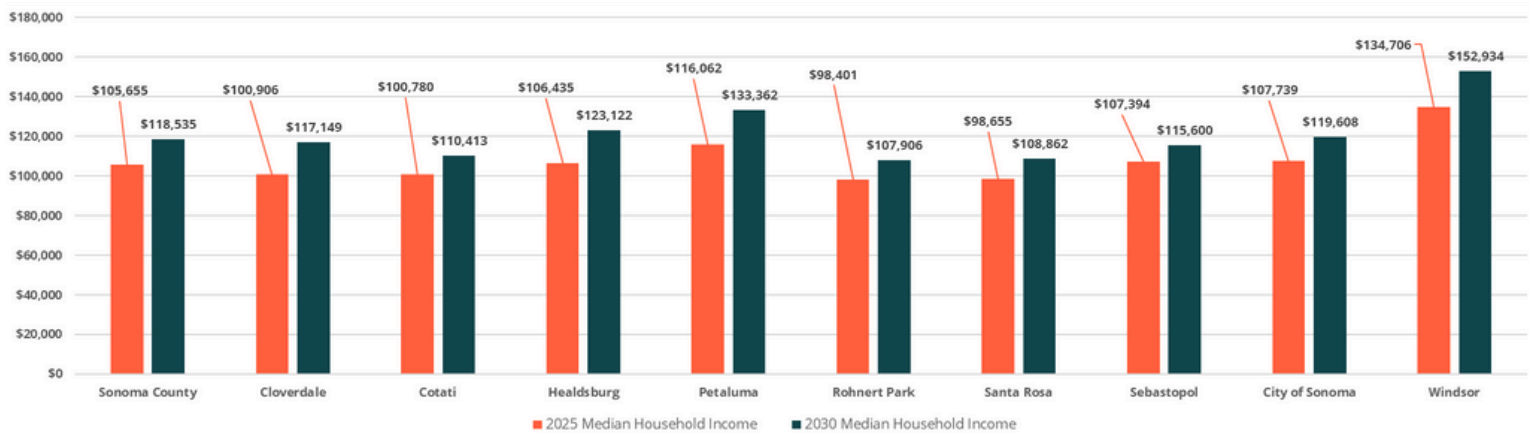
### Analysis:

This chart illustrates the number of businesses per 1,000 residents across Sonoma County's nine cities in 2023 and 2025. Although Windsor ranks third lowest in business density as of 2025—despite being the fourth largest city by population—underlying trends point to a notable economic transition. With over 2,000 new housing units approved or under construction, low commercial vacancy rates, and some of the most competitively priced office space in the region, Windsor is evolving from a predominantly residential “bedroom community” into a more balanced commercial hub. These indicators suggest a growing capacity to attract and support new businesses, signaling a shift toward a more diversified and self-sustaining local economy.





## Current & Projected Median Household Income (2025 & 2030)

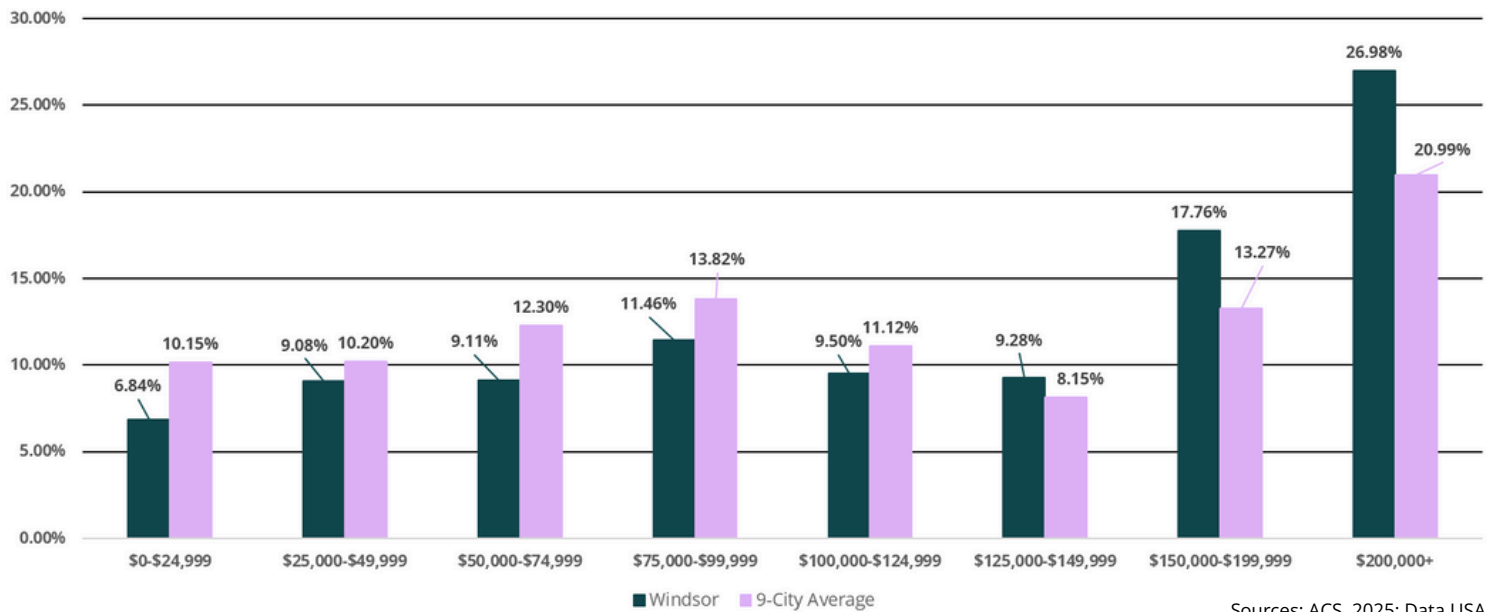


Sources: American Community Survey (5-Year Est.); Esri Business Analyst, 2025

### Primary Trends:

Windsor stands out with the highest projected median household income in Sonoma County in 2025 and is expected to remain in the number one position by 2030, rising to \$152,934, a 13.5% increase. This strong economic position reflects Windsor's relatively high share of dual-income households, newer housing stock that are primarily stand alone homes, and proximity to employment hubs in both Sonoma County and northern Marin. This is also attributed to its high composition of high earning health care, trades, and professional services jobs. Its growing workforce and stable residential character contribute to incomes that consistently outpace those of surrounding cities. Additionally, Windsor's family-oriented demographics and strong local schools attract higher-earning households, reinforcing long-term income stability.

## Metric Comparison by Household Income: Windsor vs. 9-City Average (2025)



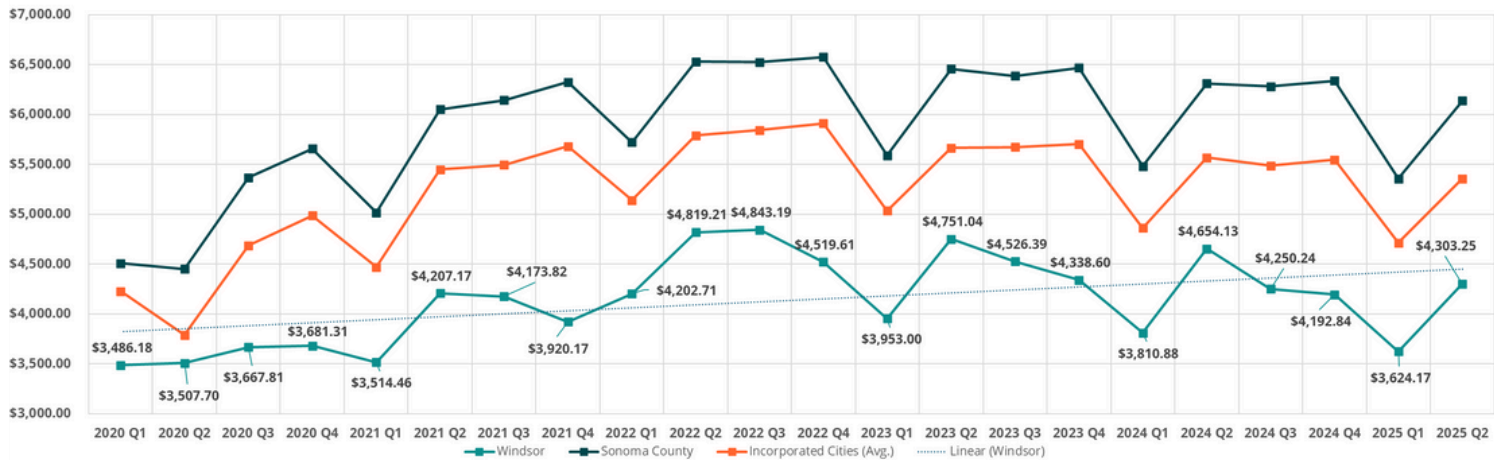
### Comments:

Windsor and the nine-city average both maintain a higher share of high-income households; however, Windsor shows a substantially greater concentration of households earning more than \$150,000 annually (44.74% compared to 34.26%). At the same time, Windsor's smaller proportion of lower-income households underscores its relatively affluent and homogeneous income profile, shaped by its predominantly single-family residential character and its concentration of residents employed in professional services and high-earning trades-related occupations.





## Quarterly Taxable Transactions Per Capita: Windsor, Sonoma County, Incorporated Cities Avg. (Q1 2020 – Q2 2025)

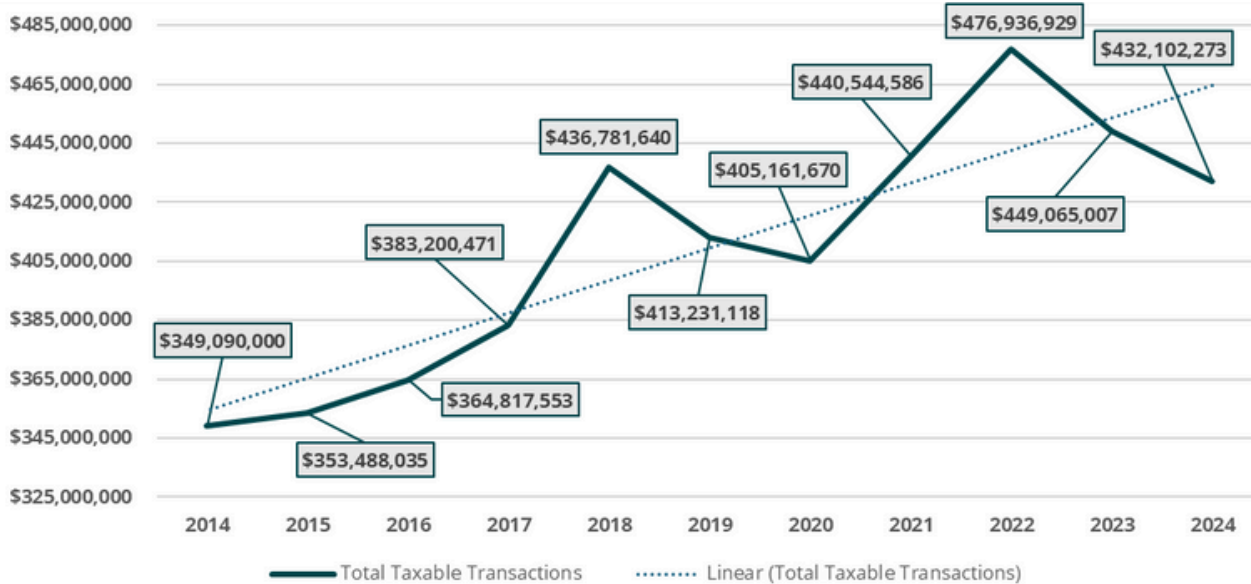


Source: California Department of Tax & Fee Administration (CDTFA)

### Analysis:

Because total taxable sales correlate with population size, taxable sales per capita provide a clearer measure of Windsor's economic activity. Windsor consistently performs below both the countywide and nine-city averages, though it follows similar seasonal trends, with increases during spring and summer tourism months. Despite recent commercial growth, the data suggest that many residents continue to shop outside town, contributing to ongoing economic leakage and reflecting Windsor's still-present—but gradually diminishing—"bedroom community" identity and limited retail base. Even so, the steady upward trajectory since Q1 2020 points to a modest post-pandemic recovery, with rising per capita sales indicating improving local engagement and emerging opportunities for retail expansion within city limits.

## Annual Taxable Transactions, Windsor (2014-2024)

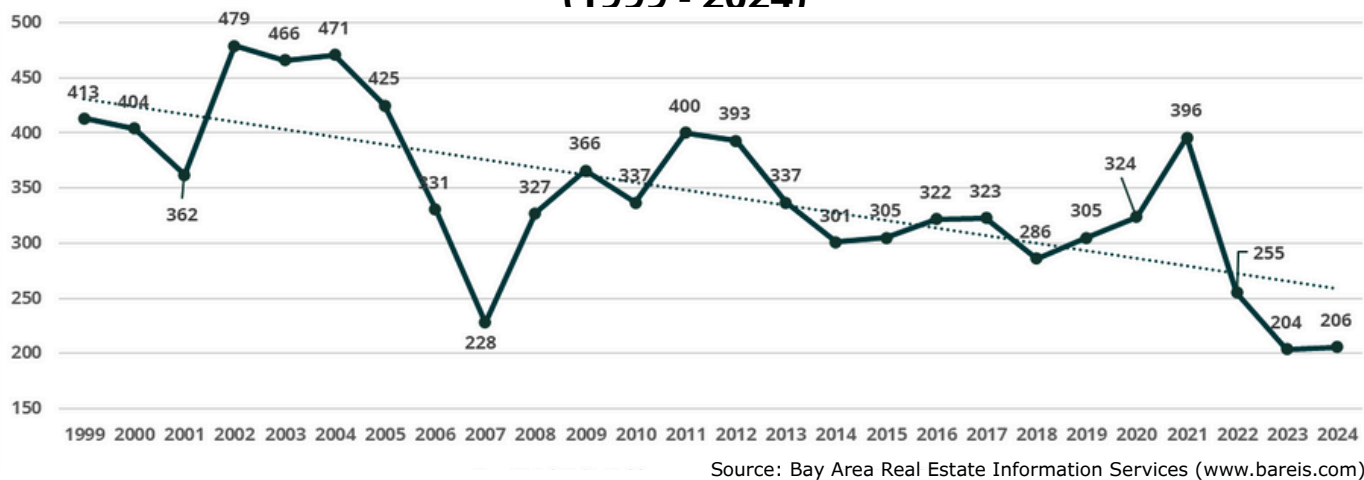


Source: California Department of Tax & Fee Administration (CDTFA)

## Average Residential Sale Price in Windsor (1999 - 2024)



## Total Units Sold in Windsor (1999 - 2024)

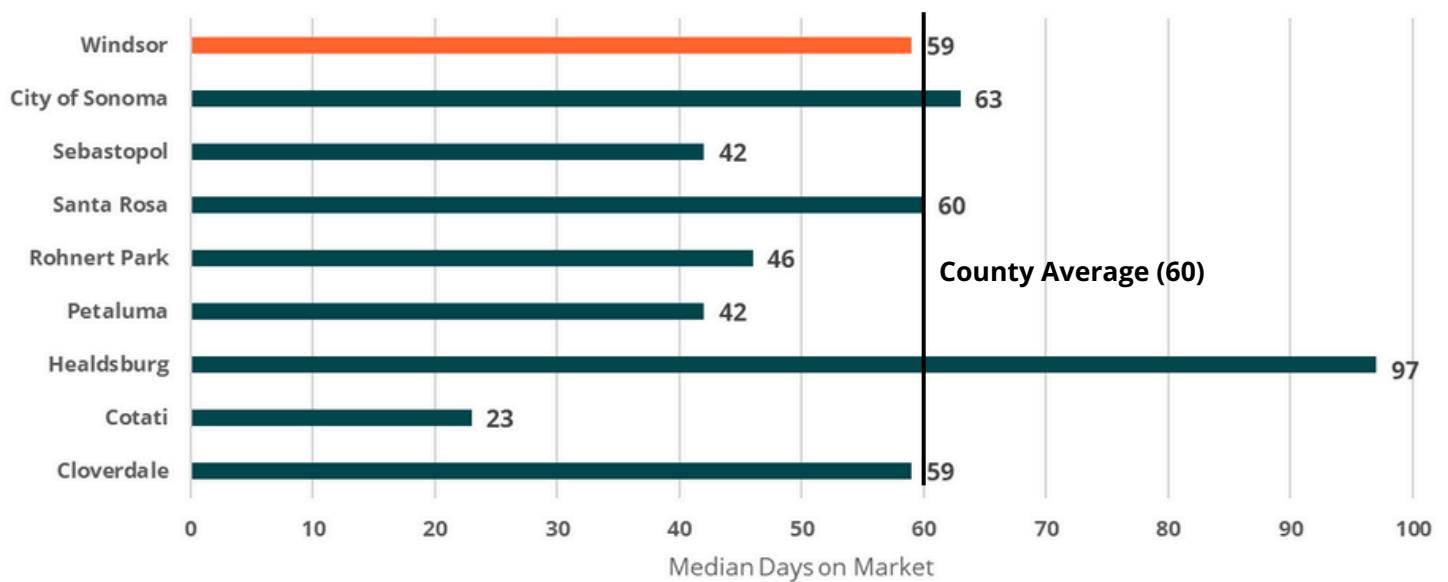


### Highlights:

The Windsor residential real estate market, from 1999 to 2024, is defined by a significant divergence between transaction volume and average pricing, with major economic events shaping market volatility. As the numbers show, the 2008 recession caused a significant reduction in sales volume, which declined sharply to a multi-year low of 228 units in 2007, while average prices experienced a milder, delayed correction over the subsequent five years. Conversely, the post-2020 pandemic era introduced notable shifts: average sale prices underwent a steep increase to peak above \$900,000 in 2022; however, this rapid value spike coincided with a substantial decline in Total Units Sold, which reached the 25-year record low of 204 units in 2023. This historical context reinforces the inverse correlation occurring in Windsor, indicating that sustained robust price appreciation has constrained market accessibility and diminished transaction liquidity in the current high-value, low-volume environment.



### Median Days Residential Property Remains on Market (Q3, 2025)



Source: Zillow Housing Market Data, Q3 2025



### Housing Trends:

Due to increasing residential demand and its prime location in the heart of Sonoma County, Windsor continues to surpass the regional average in both rental and home purchase turnaround times. This trend likely reflects Windsor's strong appeal as a family-oriented community with access to quality schools, parks, and local amenities, while still offering proximity to major employment centers in Santa Rosa and Healdsburg. Additionally, its relatively limited housing inventory and growing reputation as a desirable, safe, and community-focused town have contributed to faster leasing and purchasing activity compared to the countywide average.

## Past, Current, and Projected Residential Vacancy Rates



### WINDSOR:

<b>5.22%</b>	<b>5.53%</b>	<b>5.95%</b>
2020	2025	2030

### SONOMA COUNTY:

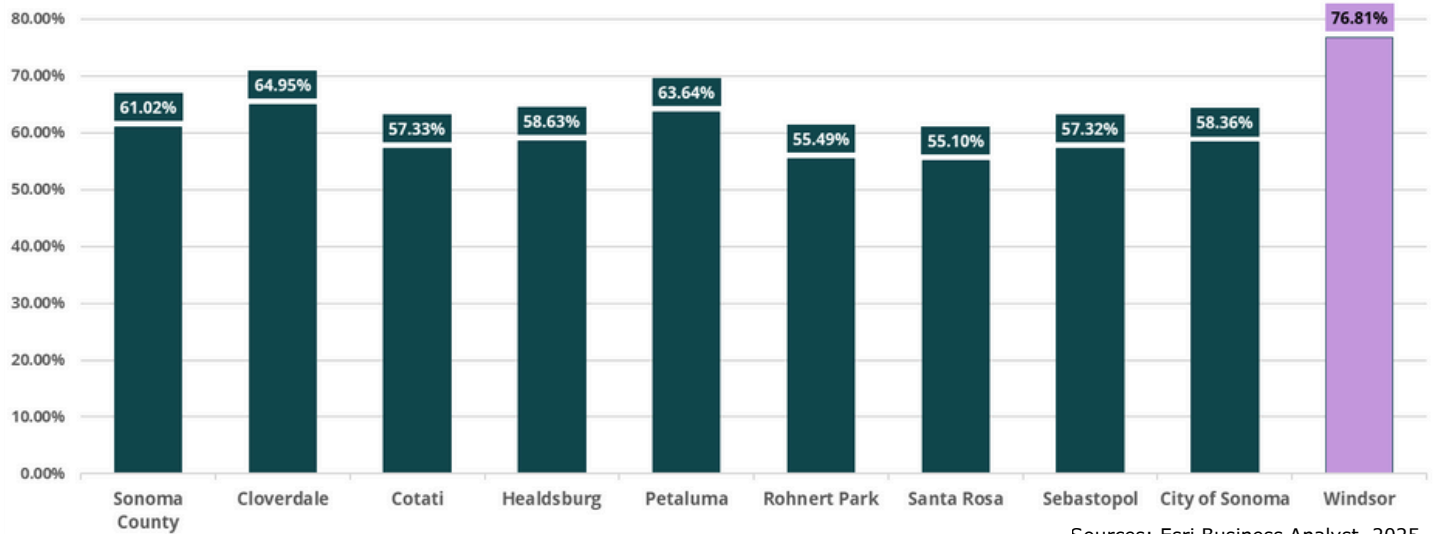
<b>8.32%</b>	<b>8.84%</b>	<b>9.15%</b>
2020	2025	2030

Sources: U.S. Census Bureau, Esri Business Analyst, 2025

### Primary Takeaways:

**Windsor's residential vacancy rate is projected to remain well below the county average**, though it has risen modestly since 2020. According to the U.S. Census Bureau, Windsor's vacancy rate is expected to reach 5.95% by 2030—an average annual increase of approximately 0.084%—compared to Sonoma County's rise from 8.84% to 9.15% (0.062% per year). This trend indicates sustained housing demand in Windsor, supported by its desirable location, family-oriented amenities, and relatively limited housing supply in relation to population growth. However, as Windsor continues to expand, new residential developments integrated within existing neighborhoods are likely to contribute to a gradual uptick in vacancies.

## Share of Owner Occupied Units (2025)



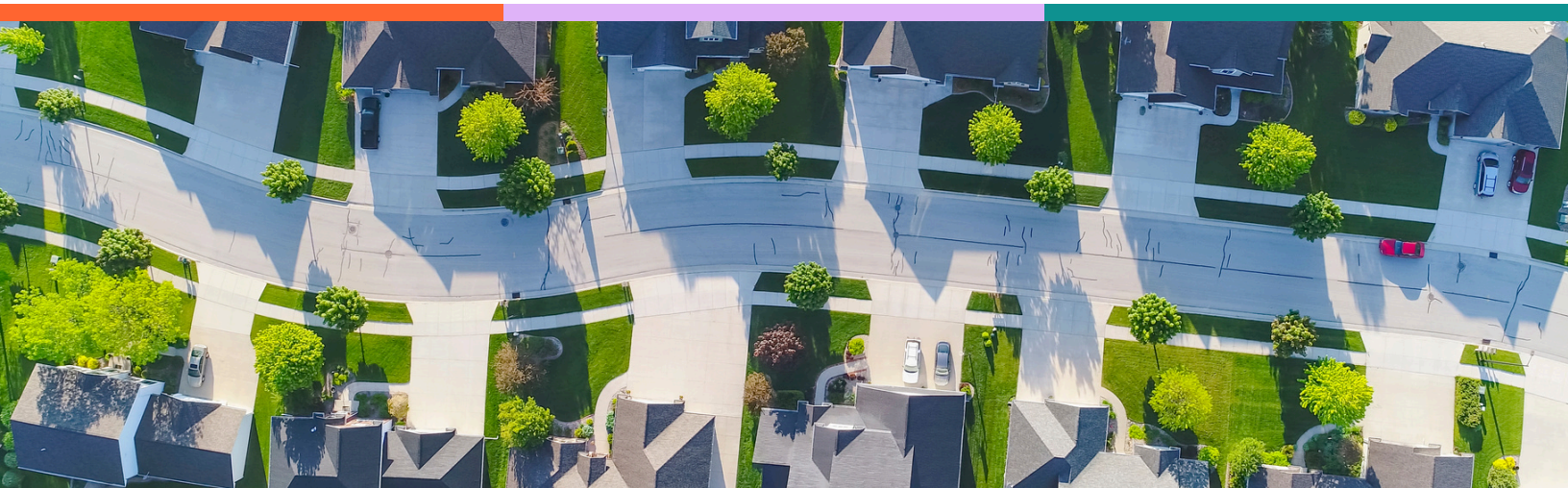
Sources: Esri Business Analyst, 2025

# 30% HIGHER.

***Windsor boasts the highest homeownership rate in Sonoma County—over 30% higher than both the countywide rate and the nine-city average of 60.85%.***

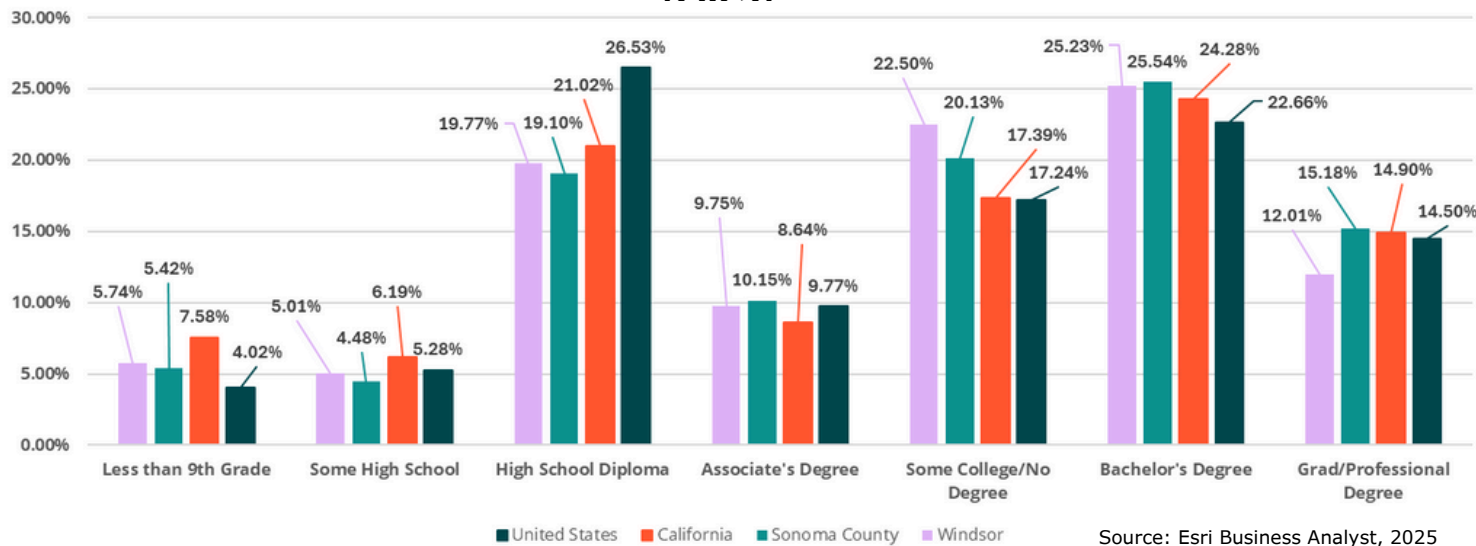
### Key Takeaways:

Windsor exhibits the highest homeownership rate in Sonoma County at 76.81%, significantly exceeding the countywide rate of 61.02% and the next highest incorporated area, Cloverdale, at 64.95%. This elevated rate reflects Windsor's predominance of single-family housing and limited share of multifamily units, which tend to favor ownership rather than rental occupancy. Higher median household incomes and a strong presence of family-oriented neighborhoods further contribute to Windsor's above-average ownership levels, distinguishing it from more urbanized communities such as Santa Rosa or Rohnert Park, where rental housing comprises a larger portion of the available residential stock.





## Educational Attainment for Windsor Residents Age 25 and Older (2025)

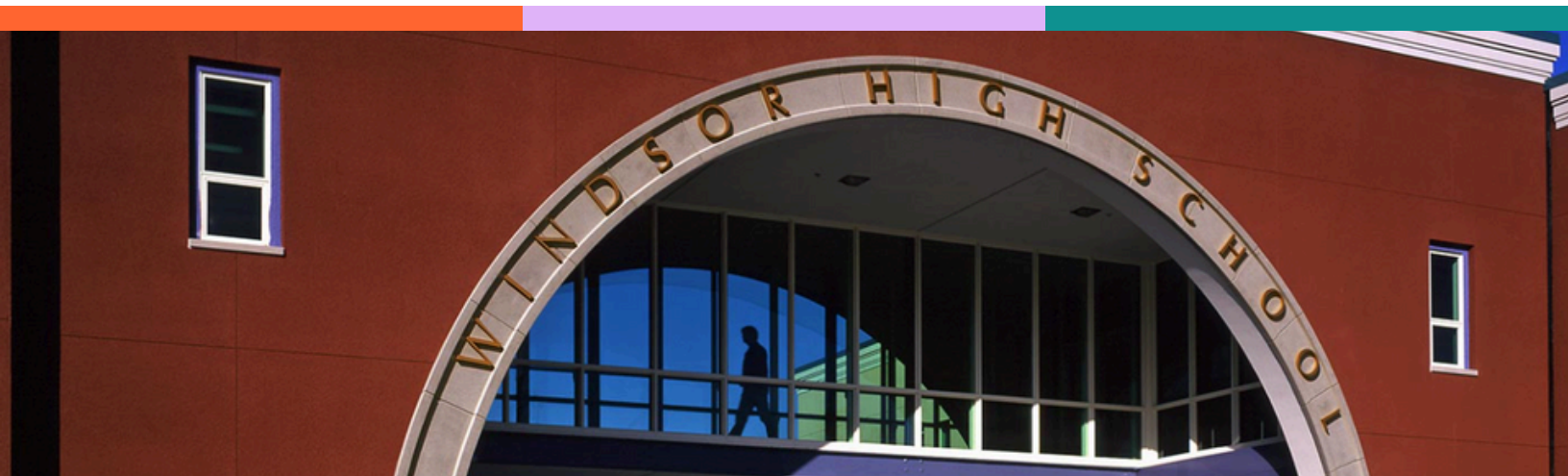


### Education Insights:

Windsor residents demonstrate strong educational attainment, with a notably higher share of adults having completed some college or an associates degree compared to state and national averages. However, the town has a slightly lower proportion of residents holding a bachelor's than Sonoma County overall. Further, compared to the other three geographic areas, Windsor holds the lowest percentage of residents over the age of 25 who hold an advanced degree. These metrics suggest Windsor is a community with a well-educated workforce that leans toward technical and applied fields rather than four-year or postgraduate education.

# 37%

*Of all Windsor Residents 25 or older hold at least a bachelor's degree in 2025.*



# Foundation Sponsors

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Morgan Stanley

North Bay Association of Realtors

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