GENERATION
HOUSING

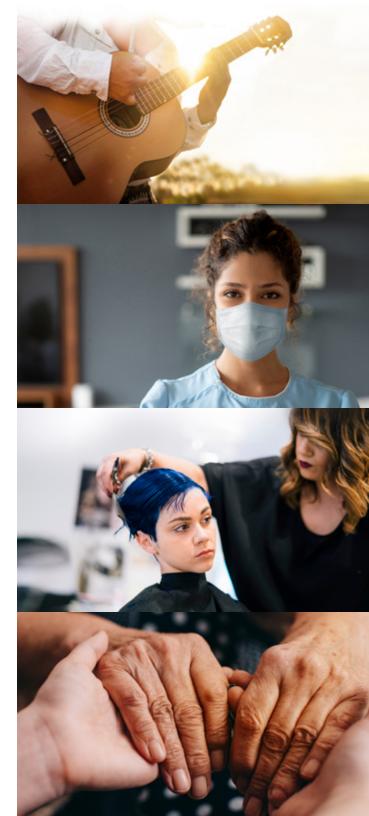**GENERATION HOUSING | JANUARY 2022**

STATE OF HOUSING IN SONOMA COUNTY

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FORWARD

The 2017 wildfires and subsequent fires, flood, and the pandemic laid bare that the state of our Sonoma County's housing resources is inextricably linked with the strength our community's resilience.

Leaders across all sectors cite the lack of affordable housing as our community's most pressing problem, our health care systems' community needs assessments identified "housing and homelessness" as the top concern, and our local business leaders cite housing as the tallest hurdle to hiring employees, from entry-level to specialty professional, to executive leadership.

Generation Housing's 2021 report "How Much Housing Do We Need" determined that Sonoma County is 38,000 units behind right now and will need 20,000 more by 2030, setting the housing production goal for this decade at a whopping 58,000 units. The follow-up "Roadmap to 58K, pt. 1" (tinyurl.com/4meyxz8j) made the audacious claim that 58,000 is doable and outlined the changes necessary to sufficiently ramp up housing production.

But making this kind of headway requires that we, as a community, match our level of concern with a commitment to action and investment in solutions.

Solving our housing dilemmas has positive ripple effects. The availability of safe, stable, and affordable housing for our community members is a critical driver for individual economic opportunity, better educational performance, and improved health outcomes. The future economic vitality and resilience of our county is jeopardized if young workers, students, and families cannot stay or cannot live in a healthy way because of housing cost burden. Investment in housing production is a powerful economic engine and job creator. And well-planned affordable housing is a boon for the environment — decreasing our carbon footprint and preserving our open space.

Jen Klose
Executive Director,
Generation Housing

Embarking on solutions requires knowing where we are starting and being able to measure our progress. And so we offer this State of Housing in Sonoma County, 2022, which we aim to be the first annual report. We hope it will be a valuable resource to our community leadership, and one day, we hope it will be a document that helps show how far we've come.

As much data as the report provides, it also begs some questions, such as: How do we compare to other localities? What are the trends of homeownership and how was it impacted by the pandemic? What is the impact of so many aging homes? How can we quickly address the rising rates of overcrowding? Ones that are especially compelling to us: What pro-housing policies can address our housing scarcity and affordability challenges in a way that also reduce housing-related disparities, begin to desegregate, and guard against gentrification-driven displacement? And, what are the specific kinds and degrees of impact of housing cost burden?

We'll be launching this comprehensive research project in the next month to help inform local funding, policy, and programmatic decisions.

We hope you'll join our efforts to get more, more diverse, and more affordable housing built.
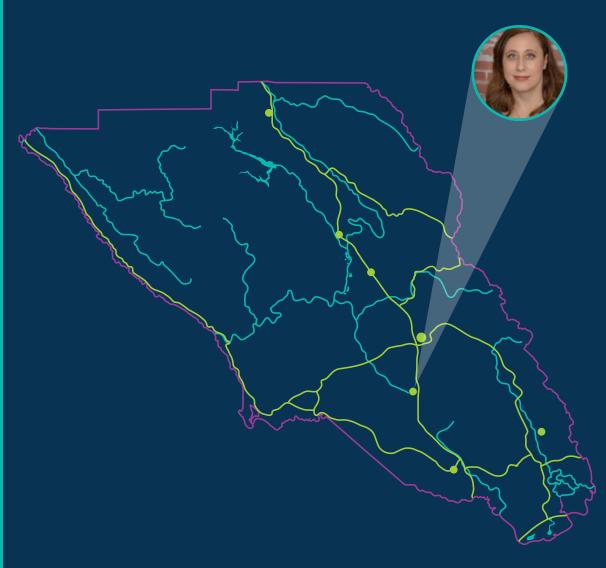
In partnership,

Jen Klose
Executive Director, Generation Housing

KEY FINDINGS

HOUSING EXPERIENCE

Adinah Caro-Greene, Rohnert Park
Sales manager, single mother

For a single working mom like Adinah, lack of affordable housing can led to years of struggle and even homelessness.

Adinah, a Bay Area native, moved to Santa Rosa with her son in 2015 for work. The search for a long-term lease they could afford was tough, resulting in her renting over-priced apartments or group house-shares in Santa Rosa and Petaluma. At one point, Adinah and her son experienced homelessness for six weeks when they had to abruptly leave due to an issue with a property manager.

Throughout her housing search, Adinah always held a steady full-time job. Unfortunately, her income was just enough so that she didn't qualify for government assistance programs. Making ends meet as a struggling single mom with no child support felt like she was always on the cusp of financial crash.

Assistance finally came when she qualified for help on a down payment to buy a two-bedroom one-bathroom condo in Rohnert Park. After she put down 5 percent and refinanced, she is in a good financial situation with her home locked in for 30 years. Her new husband, who works as a sales manager for a design firm in Marin County, moved into the condo with Adinah and her son.

"Housing is a human right, and there's not enough assistance in Sonoma County for people who are struggling to find permanent housing. We have to get past protecting the wealthy and instead prioritize people over property values. I'd like to see Sonoma County institute housing as a basic human right into their legislation and policies," she said.

KEY FINDINGS

Housing Stock

- Sonoma County's housing stock grew from 183,153 to 207,713 from 2000 to 2019 with most growth happening in the first decade.

- Homeowners constitute more than 60 percent of homes.

- Newer homes are more evenly split between for-sale and for-rent.

- 22 percent of Sonoma County's housing stock was produced in the 1970s — by far the most productive decade in home construction.

- Over 90 percent of owner-occupied homes are single family homes.

- About 47 percent of rental units are multifamily homes.

- Single family homes constitute over 90 percent of owner-occupied units in six of nine Sonoma County cities.

- Rohnert Park has by far the most diversity in its rental housing types.

- 78 percent of Windsor homes are three-plus bedroom homes, by far the largest in the county.

- Sebastopol homes tend to be smaller as roughly 55 percent of Sebastopol's homes are two bedrooms or smaller.

- As of 2018, the housing stock of federally subsidized rental housing in Sonoma County featured 8,543 homes, or about 12 percent of Sonoma County's overall rental housing inventory.

Density

- Rohnert Park is by far the densest city in the county with about 6,100 people per square mile.

- Most cities and towns in Sonoma County hover around 4,000 people per square mile.

- Most cities in Sonoma County increased in density over the past two decades.

- The Town of Windsor had the largest decrease in density since 2000, dropping from 5,100 people per square mile to 3,800 — a decline of 25.5 percent.

- Windsor and Petaluma have the least proportional amount of land zoned for residential housing.

- The Springs neighborhood in Sonoma Valley has the largest share of overcrowded households in the county.

- Santa Rosa has eight out of ten of the most overcrowded neighborhoods in the county.

KEY FINDINGS

"Increasing equitable opportunities for a high-quality education promises that every child in Sonoma County can realize their full potential, but is an empty promise if we lack an adequate supply of housing that is affordable for families. Stable, safe and affordable housing promotes a supportive home environment, directly contributing to a child's educational experience, promoting their sense of belonging and trust in their teachers and peers, and overall better academic outcomes. We can think of stable and affordable housing as a "vaccine" that lowers the risks of poor educational attainment and levels the playing field so that all students can thrive!"

—*Angie Dillon-Shore, Executive Director, First 5 Sonoma County*

- There is no obvious correlation between overcrowding and dense neighborhoods in Santa Rosa.

- Most population density is west of Highway 101 but also is present at moderate to high levels in some neighborhoods east of Highway 101.

- The model reveals a negative relationship between population density and the share of non-Hispanic white residents, so that as the share of white residents increases in a neighborhood's population, density decreases.

- All cities and towns in Sonoma County have experienced some measure of decline in the number of households with children over the last two decades.

- Sebastopol and Healdsburg experienced the largest declines in the number of households with children, with a reduction in nearly 30 percentage points during that time period.

Residents and their Homes

- The City of Sonoma has the largest share of households in which the householder lives alone at 38 percent of total households.

- All cities and towns nearly doubled or tripled in their share of households with a householder living alone in the last twenty years.

- The City of Sonoma has the largest share of senior households at roughly 33 percent of the total households — an increase of 65 percent since 2000.

- Virtually all cities and towns across the county have seen increases in their senior populations over the last twenty years.

- Seven of the nine cities and towns had an increase in their share of foreign born residents over the last two decades with the exception of Healdsburg and Petaluma.

- In 2000, three in four residents were white non-Hispanic residents, and in 2019 that share shifted to less than two in three, or about 63 percent.

- Latino residents increased as the share of the population from 17 percent in 2000 to nearly 27 percent in 2019.

- Sonoma County cities and towns have increased their share of college educated residents nearly across the board.

- Sebastopol, along with Healdsburg, Sonoma, and Petaluma, each have college educated rates of 40 percent and higher — the highest in the county.

- In 2005, Sonoma County had a median household income of about $76,000, then bottomed out in 2011-2012 when household incomes had dropped to less than $67,000 (in 2019 dollars) — a loss of $9,000 for the median household, or about $750 a month. It has since rebounded and surpassed Great Recession levels.

KEY FINDINGS

- Black and Latino homeownership rates are significantly lower than white households at 33 and 39 percent, respectively.

- White households are twice as likely to own a home in Sonoma County compared to Black households.

- Employees in occupations with lower-wages struggle to find housing on the market with many who need affordable rental housing at or below $1,000 a month; overall median asking rents are double that rate.

- Overall median asking rents in Sonoma County have generally trended upward in the last four years since 2017 despite a brief slight dip in 2019 and 2020.

- Current asking rents range from a studio at $1,391 to a four-bedroom home for over $3,000.

- Rent burden is felt most acutely by lower income households. 50 to 80 percent of low to extremely low income renters experienced moderate rent burden.

- Severe rent burden affects seven in ten extremely low income renters, and a third of very low income renters.

- Black and Latino renters are disproportionately impacted by moderate and severe rent burden.

- 65 and 56 percent of Black and Latino renters are cost burdened, respectively.

- Latino and Asian or Pacific Islander renters experience the highest rates of overcrowding with nearly one in four and one in five living in crowded housing conditions, respectively.

- White renter households have the least amount of overcrowding in Sonoma County.

- The percentage of children living in crowded housing conditions in Sonoma County rose steadily since 2010 at a faster pace than the state average. The gap between the state average and Sonoma County's was 8.2 percentage points in 2010, but Sonoma County cut that gap in half to 4.2 points in 2018.

- Sonoma County housing production highs since the Great Recession (post 2010) fall short of even the lowest production years in the 1980s and 1990s.

- Sonoma County's homebuilding was strongest in the 1980s and carried through the 1990s and 2000s until the Great Recession.

KEY FINDINGS

"We're a diverse coalition advancing equity, economy, and environment in Sonoma Valley. Our members are clear that building and preserving infill, lower-cost, modern housing, especially multi-family housing, achieves all three of these goals. Modern homes are far more climate friendly and water wise than the single family homes most of us now live in."

—*Caitlin Cornwall, Project Director, Sonoma Valley Collaborative and biologist*

Homebuilding

- From 2014 to 2019, the rental vacancy rates dropped statewide and locally. Sonoma County's rate decreased from 4.6 percent to 2.9 percent.

- Sonoma County's rental vacancy rate declined at a greater pace than California's during that time.

- Nearly every city in the county will need to build significantly more housing at all income levels by 2031.

- Cities like Petaluma, Rohnert Park, Windsor, and Healdsburg's Regional Housing Needs Allocation (RHNA) housing goals have nearly or more than doubled in the upcoming eight year cycle from 2023 to 2031.

- Most cities in Sonoma County remain short on achieving their affordable housing goals, although time remains in the current cycle for cities to achieve their goals.

- Unincorporated Sonoma County has performed the strongest with respect to its RHNA goals. For example, its low income target is thirty-seven units for the entire cycle but has 283 units to date (765 percent).

- The vast majority of land in Sonoma County's cities are zoned exclusively for single family homes.

- Over 80 percent of Healdsburg, Windsor and Santa Rosa are zoned exclusively for single family homes. Cotati and Rohnert Park have the lowest percentages of exclusionary zoning.

- Data suggests a positive relationship between intra-city racial segregation and the share of a city's zoning capacity dedicated exclusively to single family only.

- Sonoma and Sebastopol top the list with jobs-to-housing ratios above 1.4, though well below the region with cities like San Francisco and San José producing more than three jobs for every permitted home.

- Sonoma County has an average of 2.7 low-wage jobs for every one affordable home.

- Sonoma and Sebastopol have more than five low-wage jobs for every affordable home, indicating that more affordable homes are desperately needed in these two cities to meet the need of lower income households.

- Sonoma County's land value of a quarter-acre lot increased about 118 percent from 2012 to 2018 — with nearly all counties in the Bay Area doubling in land value.

- The cost of land as a share of the property value at 35 percent in Sonoma County is lower relative to other counties.

HOUSING STOCK

HOUSING EXPERIENCE

Branden Kessel, Sacramento
Electrical Engineer, former Sonoma County resident

After Branden graduated from Sonoma State University in 2012, he immediately found work in his field as an electrical engineer in Rohnert Park. In a stroke of luck, he also found housing through a friend who rented to him for a low price for the next six years — until that friend had to relocate, leaving Branden scrambling to find housing.

Branden then moved to downtown Petaluma, a charming town he loved, but unfortunately his new rental apartment was over three times the price of his previous place. Shocked by high monthly expenses, Branden began to look into options to buy a home, so that he could build equity in his housing expenses, especially as he advanced in his career. He looked all over Sonoma County for months, but struggled to find a single family home for under $450,000 that wasn't in a fire zone or wildland urban interface (WUI).

When the COVID-19 pandemic hit, and his engineering career shifted to working from home, Branden had newfound freedom in his living location. After an exhaustive housing search in Sonoma County, Branden finally reached out to a realtor friend in Sacramento. In less than four months, he was able to purchase a home there and in 2021 Branden moved from Sonoma County to his new home in Sacramento.

Branden said he would have loved to stay in Petaluma, but the lack of housing supply pushes home prices even higher, thus making homeownership a huge challenge in Sonoma County.

HOUSING STOCK

Key Finding

OVERALL GROWTH

- Sonoma County's housing stock grew from 183,153 to 207,713 from 2000 to 2019 with most growth happening in the first decade.

In 2019, there were about 207,713 housing units in Sonoma County, up 13.4 percent since 2000 (see Table 1). Most of the growth in the city's housing stock occurred during the 2000-2010 decade in which 10.7 percent of growth occurred — a net plus of 19,515 housing units were added.

Every city and town saw growth since 2000, but not every place has grown at the same rate. As Table 2 shows, Healdsburg saw the largest percentage growth since 2000, adding 1,151 housing units during that period — an increase of almost 28 percent. Other cities and towns that grew above 20 percent include Sonoma, Cloverdale, Santa Rosa, and Windsor. Conversely, cities like Sebastopol added only about 155 units in the last twenty years — less than a 5 percent increase.

Table 1: Total Housing Units by County Region

	2000	2010	2015	2019
Cloverdale-Geyserville Region	5,004	5,910	5,789	5,578
Healdsburg-Windsor Region	14,872	17,046	18,505	18,115
Petaluma-Cotati-Rohnert Park	45,153	49,541	48,986	50,595
Russian River-Coastal Region	15,476	15,695	16,590	16,601
Santa Rosa Region	73,213	83,142	83,532	84,149
Sebastopol Region	11,915	12,646	13,304	12,915
Sonoma Valley	17,520	18,688	19,693	19,760
Total	183,153	202,668	206,399	207,713

Table 2: Total Housing Units by City and Town

|	2000	2010	2015	2019	Percent Change
Petaluma	20,304	22,382	22,423	23,291	14.7%
Windsor	7,728	9,104	9,716	9,488	22.8%
Rohnert Park	15,808	16,852	16,424	17,025	7.7%
Santa Rosa	57,578	66,913	67,337	69,814	21.3%
Sebastopol	3,321	3,377	3,777	3,476	4.7%
Cloverdale	2,619	3,469	3,287	3,239	23.7%
Sonoma	4,671	5,219	5,436	5,778	23.7%
Cotati	2,585	3,218	2,944	2,911	12.6%
Healdsburg	4,138	4,729	5,025	5,289	27.8%
Total	118,752	135,263	136,369	140,311	18.2%
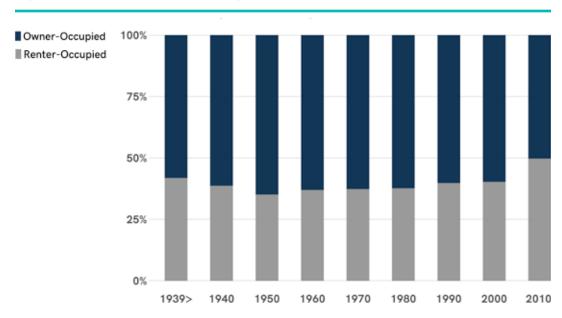
Sources Tables 1 and 2: 2000 and 2010 figures – Decennial Census reflecting full count of housing units; 2015 and 2019 figures – estimates from American Community Survey based on sample of U.S. population, thus statistically valid approximations with small margin of error.

HOUSING STOCK

Key Findings

OCCUPIED & VACANT

- **Homeowners constitute more than 60 percent of homes.**

- **Newer homes are more evenly split between for-sale and for-rent.**

Sonoma County's housing stock in 2019 included about 116,000 owner-occupied units and nearly 73,000 renter-occupied units, respectively constituting 61 and 39 percent of the total occupied housing stock in Sonoma County (see Table 3). More than 4 percent of the total housing stock is currently listed as seasonally vacant.

In viewing the current housing stock by year built, Figure 1 shows that units built in the last decade are split 50/50 between owner and renter-occupied units while units built in the 1950s represent the largest homeownership rate.

Figure 1: Share of Occupied Housing by Tenure and Year Built

Source: American Community Survey and Decennial Census, Generation Housing

Table 3: Housing Units by Tenure and Occupancy, Sonoma County in 2019

	Total Units	Percent
Owner-Occupied	116,393	61.0%
Renter-Occupied	72,981	39.0%
Vacant and for rent	2,160	69.0%
Vacant and for sale	958	31.0%
Leased and vacant	543	3.6%
Sold and vacant	295	1.9%
Seasonally Vacant	8,770	57.6%
Other vacant	5,613	36.9%
Total	207,713	100.0%

Source: American Community Survey, Generation Housing

HOUSING STOCK
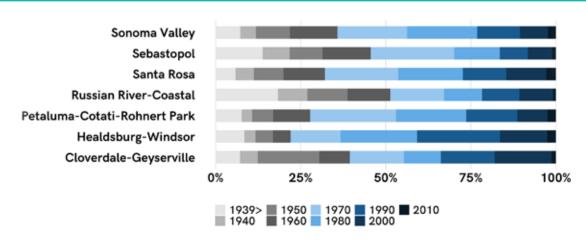
Key Finding

AGE

- **22 percent of Sonoma County's housing stock was produced in the 1970's — by far the most productive decade in home construction.**

By 2019, housing across Sonoma County's regions varied considerably in terms of when it was built. The Russian River-Coastal region — which includes Forestville and Occidental and stretches all the way to Sea Ranch — has the largest share of homes (51 percent) built during or before the 1960s.

Conversely, as Figure 2 shows, the Healdsburg-Windsor region saw most of its housing stock be added after the 1960s with almost 78 percent added between 1970 and 2019. The most productive decade for this region occurred in the 1990s when about 24 percent of growth occurred, or almost 4,000 new homes, and the 1980s with 23 percent growth.

Figure 2: Housing Units by Year Built

Source: American Community Survey, Generation Housing

HOUSING STOCK
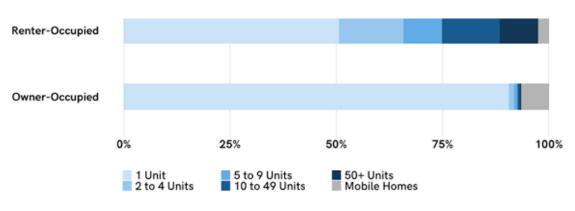
Key Findings

RENTERS & OWNERS

- Over 90 percent of owner-occupied homes are single family homes.

- About 47 percent of rental units are multifamily homes.

In 2019, Sonoma County's most distinctive housing characteristic was the homogeneity of homeownership in which over 90 percent of owner-occupied homes were single family homes. The second largest segment in homeownership were mobile homes that constitute almost 7 percent of owner-occupied units. The remainder, less than 3 percent, were multifamily homes.

Rental homes, however, have far more housing type heterogeneity as compared to owner-occupied homes. Single family homes make up 51 percent of rental units, almost 40 percentage points less; two- to four-unit multifamily homes make up the second largest group at 14 percent; five- to nine-unit and fifty-plus unit homes both constitute 9 percent of rental units; ten- to forty-nine-unit homes make up about 14 percent of all rental units with mobile homes composing less than 3 percent.

Figure 3: Tenure by Building Size, Sonoma County in 2019

Legend:
- 1 Unit
- 2 to 4 Units
- 5 to 9 Units
- 10 to 49 Units
- 50+ Units
- Mobile Homes

Source: American Community Survey, Generation Housing

HOUSING STOCK

Key Findings
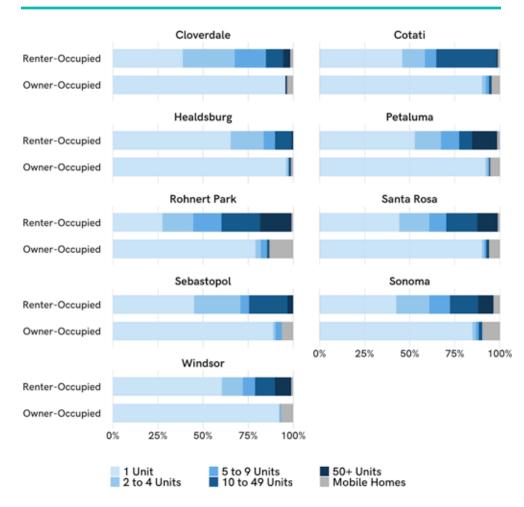
TYPES

- Single family homes constitute over 90 percent of owner-occupied units in six of nine Sonoma County cities.

- Rohnert Park has by far the most diversity in its rental housing types.

Homeownership across the county is largely concentrated in single family homes. However, the diversity of rental homes, or the lack thereof in some cases, reveals considerable variation across Sonoma County cities and towns.

Healdsburg and Windsor top the list of single family homes with the largest share of renter-occupied units at over 65 and 60 percent, respectively. Conversely, Rohnert Park and Cloverdale's stock of renter-occupied 1-unit homes make up less than 28 and 39 percent, respectively. Rental complexes — duplexes, triplexes, and quadplexes — make up the largest share in Cloverdale, Sebastopol, and Healdsburg at 29, 26, and 18 percent, respectively.

Figure 4: Tenure by Building Size, Sonoma County in 2019

Source: American Community Survey, Generation Housing

38k ACCRUED DEFICIT OF HOMES SINCE 2000

58k TOTAL DEFICIT AND FUTURE NEED OF HOMES

73% OF THE DEFICIT IS IN AFFORDABLE HOMES

20k FUTURE NEED OF HOMES OVER THE NEXT DECADE

"How Much Housing Do We Need," Generation Housing, 2021 (tinyurl.com/mvbwz379)

HOUSING STOCK

Key Findings
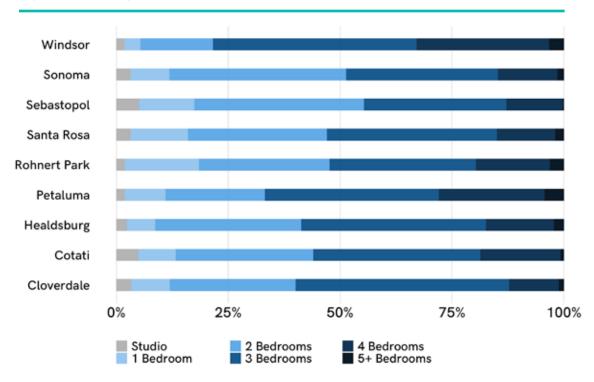
SIZE

- **78 percent of Windsor homes are three+ bedroom homes, by far the largest in the county.**

- **Sebastopol homes tend to be smaller as roughly 55 percent of Sebastopol's homes are two bedrooms or smaller.**

In 2019, the most common type of home in Sonoma County were three-bedroom homes accounting for 38 percent of the county's total housing stock. The second most common housing type were two-bedroom homes, accounting for 30 percent of homes. These homes may be more desirable for families with children or multigenerational households. Cloverdale, Windsor, and Healdsburg top the chart by percentage as 48, 46, and 41 percent of their housing stock is composed of three-bedroom homes.

Smaller units appear to be harder to come by as 12 percent of homes are one-bedroom units and only 3 percent of homes are studios, which may be more coveted by younger households. Of studio units, Cotati had the largest share with 5 percent of its housing stock (143 units).

Figure 5: Housing Units by Bedroom Count, Sonoma County in 2019

Note: Population density – thousnds of people per square mile.
Source: American Community Survey, Generation Housing

HOUSING STOCK

HOUSING IS STABILITY
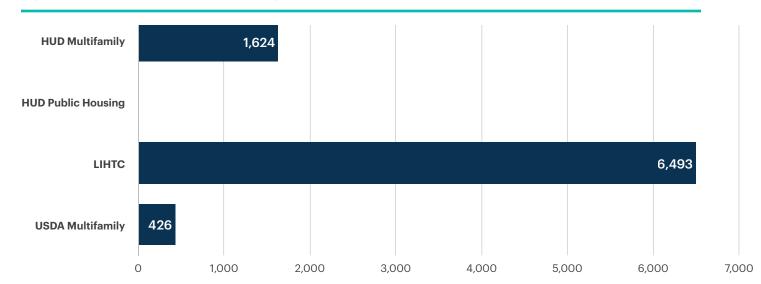
"Every single young person in this county has been affected by major events over the last four years: fires, evacuations, the pandemic. A safe and stable home is critical to a young person's ability to manage these disasters as well as navigate the additional challenges of education, of family stress and struggles with mental health. For many, having a stable home provides solid ground to keep them feeling secure. For others, lack of housing is yet another layer of instability that throws them off balance. We need to pay special attention to the housing needs of our most vulnerable youth."

—*Anita Maldonado, CEO,*
Social Advocates for Youth

Key Finding
FEDERALLY SUBSIDIZED

- As of 2018, the housing stock of federally subsidized rental housing in Sonoma County featured 8,543 homes, or about 12 percent of Sonoma County's overall rental housing inventory.

In 2018, the housing stock of federally subsidized rental housing in Sonoma County featured 8,543 homes with the vast majority funded by the Low Income Housing Tax Credit federal program (LIHTC). The program, first conceived in 1986 and made permanent in 1993, accounts for about 76 percent of the federally subsidized affordable housing stock in Sonoma County. In addition to federally subsidized units, which account for much of the financing available for affordable housing, some local jurisdictions may also have units financed with state, local, or private funds.

Figure 6: Federally Subsidized Housing Units, Sonoma County in 2018

Category	Units
HUD Multifamily	1,624
HUD Public Housing	
LIHTC	6,493
USDA Multifamily	426
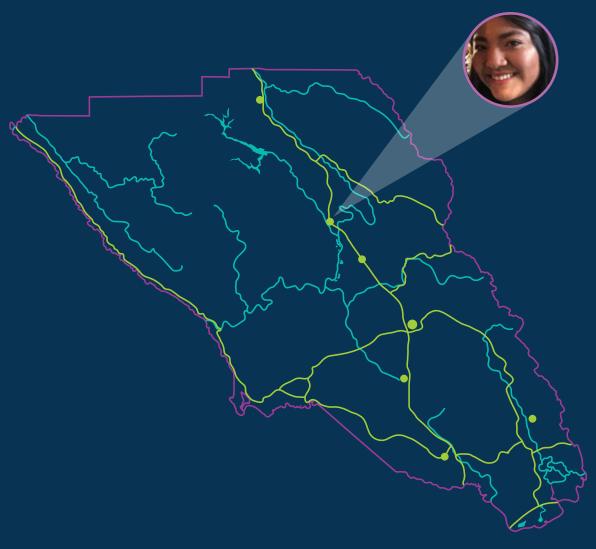
Source: HUD Multifamily Database, HUD's Picture of Subsidized Households, LIHTC, and USDA, Generation Housing

DENSITY

HOUSING EXPERIENCE

Ivonne Callejas, Healdsburg
Healthcare worker, raised in Sonoma County, mother

Ivonne considers herself lucky. Even though she has deep roots in Sonoma County, she and her husband never thought they could purchase a home in the area and for a while they rented a Santa Rosa apartment.

Then they were introduced to Housing Land Trust, which helped them buy a Healdsburg home they love in 2016 with zero down payment and an affordable mortgage.

"We qualified for the Housing Land Trust program, which at the time felt like it was too good to be true, but ended up being the reason we were able to purchase our house. If we hadn't been accepted, we'd still be renting an apartment," said Ivonne, who works as a medical assistant at Sutter Health in Healdsburg.

Ivonne and her husband, who commutes to Sebastopol for work, live at their Healdsburg home with their two sons. Ivonne grew up in Sonoma County, and never wants to move away.

Aside from HOA fees, which fluctuate, Ivonne is very happy to be a homeowner and raise her family in a place she loves and feels rooted to. She believes everyone should own a home, and is excited organizations like Housing Land Trust and Generation Housing provide support and resources to help everyone get just as "lucky."

DENSITY

Key Findings
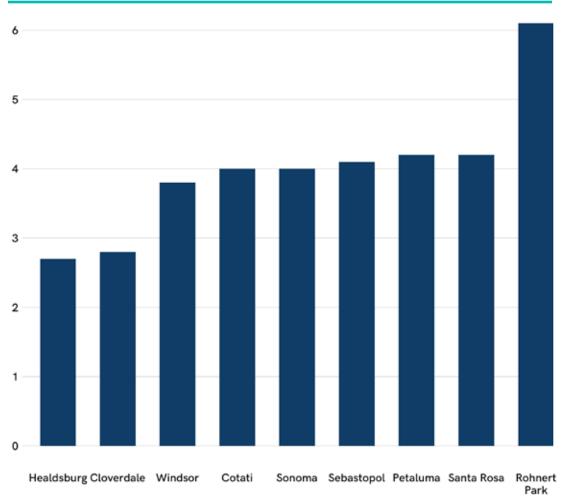
OVERALL

- **Rohnert Park is by far the densest city in the county with about 6,100 people per square mile.**

- **Most cities and towns in Sonoma County hover around 4,000 people per square mile.**

In this section, we spotlight density to examine how Sonoma County residents experience the evolution of their neighborhoods. This topic is of significant importance as the state, counties, cities, and towns look to density as a potentially important feature of future housing solutions. Unless otherwise noted, this report measures density as a population estimate relative to a standard unit of land; in this case, thousands of people per square mile.

As Figure 7 shows, when we review Sonoma County cities, Rohnert Park has the most density with about 6,100 people per square mile. Healdsburg and Cloverdale, on the other hand, are the least dense cities with 2,700 and 2,800 people per square mile. Most cities in the county hover around 4,000 people per square mile.

Figure 7: Population Density of Sonoma County Cities, 2019

Note: Population density – thousands of people per square mile.
Source: American Community Survey, Generation Housing

HOUSING IS ECONOMIC PROSPERITY

DENSITY

"Tackling our housing challenges is key to building thriving city centers, sustained economic prosperity, and cultural wealth for everyone. Getting sticks in the ground and cranes in the air can be a job creator and local economic engine as we recover from the COVID economic slump. It is also needed if we want to attract more, good paying employers to Sonoma County so our kids can have a chance of finding their career and raise their own family here."

—*Peter Rumble, CEO,*
Santa Rosa Metro Chamber

Key Findings

OVER TIME

- **Most cities in Sonoma County have increased in density over the past two decades.**

- **The Town of Windsor had the largest decrease in density since 2000, dropping from 5,100 people per square mile to 3,800 — a decline of 25.5 percent.**

Table 4: Population Density in Sonoma County

	2000	2010	2015	2019	Percent Change
Sonoma	3.4	3.8	4.0	4.0	17.6%
Cotati	3.4	3.8	3.9	4.0	17.6%
Sebastopol	4.1	4.0	4.1	4.1	0.0%
Cloverdale	2.7	3.1	2.9	2.8	3.7%
Healdsburg	2.8	2.5	2.6	2.7	-3.6%
Petaluma	4.0	3.9	4.1	4.2	5.0%
Rohnert Park	6.6	5.8	5.9	6.1	-7.6%
Santa Rosa	3.7	3.9	4.2	4.2	13.5%
Windsor	5.1	3.5	3.7	3.8	-25.5%

Note: Population density – thousands of people per square mile.
Source: American Community Survey and Decennial Survey, Generation Housing

Sonoma County is fairly distinct in having urban growth boundaries (UGB) that restrict city and town limits from expanding as a measure of curbing sprawl and preserving open space. UGB have been resoundingly approved and renewed by local residents making this policy one of the most popular in the county. As a result, local cities are looking inward to infill housing as the avenue for new housing. Current density, therefore, is a key feature of future housing and land use in Sonoma County.

Density trends in the county, however, appear to vary somewhat in each city and town. For most cities, density increased modestly from 2000 to 2019; anywhere from 3.7 percent in Cloverdale to 17.6

percent for Sonoma and Cotati, respectively. For both of the latter cities that translates to 4,000 people per square mile.

For cities like Sebastopol, not much appears to have changed in the last twenty years with respect to density, which still remains sat 4,000 people per square mile.

But for towns like Windsor, density went the opposite direction. At its peak in 2000, Windsor had 5,100 people per square mile. Its density decreased rapidly in the ensuing two decades by over 25 percent. Other cities like Healdsburg and Rohnert Park also lost density during that time.
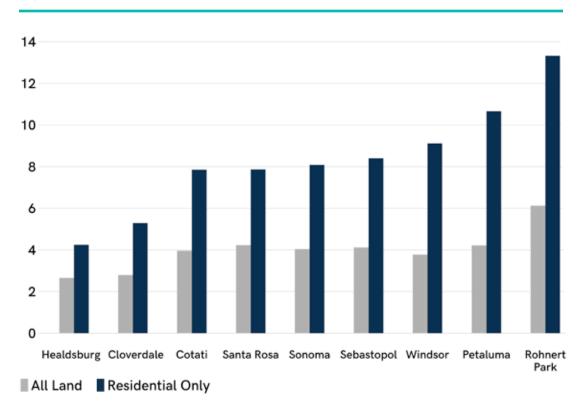
DENSITY

Key Finding
ZONING

- **Windsor and Petaluma have the least proportional amount of land zoned for residential housing.**

In the prior indicator, we examined population density. Next, adjustments for zoning are made to account for the variation that may be present with certain cities or towns that may have more or less land zoned for residential neighborhoods, which may affect overall population density rankings.

In 2019, population density adjusted for residentially zoned land shows that Rohnert Park remains the most dense city in the county with over 13,300 people per square mile. Petaluma, similarly, ranks second with more than 10,600 people per square mile.

The Town of Windsor, which had ranked near the bottom in the prior indicator, ranks third in population density once adjusting for residentially zoned land — notably, about 41 percent of Windsor's land area is zoned residential. Only Petaluma has a smaller share of land zoned residential with about 39 percent of total zoned residential.

Figure 8: Population Density by Jurisdiction

Source: American Community Survey and Othering and Belonging Institute at UC Berkeley, Generation Housing

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DENSITY

Key Findings

OVERCROWDING

- **The Springs neighborhood in Sonoma Valley has the largest share of overcrowded households in the county.**

- **Santa Rosa has eight out of ten of the most overcrowded neighborhoods in the county.**

An overcrowded household is defined as more than one person per room, according to the California Department of Public Health's Office of Health Equity.

In 2019, the Springs neighborhood in Sonoma Valley ranked at the top with about 29 percent of households — over 1,000 — deemed to be overcrowded. In Santa Rosa's Roseland neighborhood, which encompasses the largest stretch of Sebastopol Road, about 21 percent of total households as overcrowded. In fact, eight out of the ten most overcrowded neighborhoods reside within the City of Santa Rosa and all at levels of 12 percent or higher. Notably, all Santa Rosa neighborhoods with moderate to high levels of overcrowding are west of Highway 101 or south of downtown.

Map 1: Percent of Overcrowded Households by Neighborhood, 2019

20%
10%

Source: American Community Survey, Generation Housing

DENSITY

Key Findings
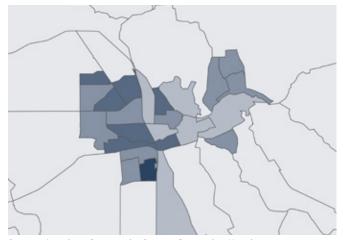
OVERCROWDING VS. DENSITY

- **There is no obvious correlation between overcrowding and dense neighborhoods in Santa Rosa.**

- **Most population density is west of Highway 101 but is also present at moderate to high levels in some neighborhoods east of Highway 101.**

Map 2: Population Density of Santa Rosa, 2019

Source: American Community Survey, Generation Housing

In the prior indicator, we examined overcrowded households and found that Santa Rosa had eight of the ten most overcrowded neighborhoods in the county. In this indicator, we take a closer look at population density to analyze if any patterns emerge correlating density and overcrowding.

We noted earlier that overcrowding was largely concentrated west of the Highway 101 and south of downtown. However, population density appears to be more distributed than overcrowding. Though significant population density appears to be west of Highway 101, there are noticeably more neighborhoods east of the 101 that also have moderate to high levels of population density, despite not registering among the top ten in overcrowding.

As the National Multifamily Council noted in its latest research on overcrowding and density (tinyurl.com/4je9d7fx), little to no evidence exists that suggest a correlation between the two factors.

DENSITY

Key Finding

DEMOGRAPHICS

- **The model reveals a negative relationship between population density and the share of non-Hispanic white residents, so that as the share of white residents increases in a neighborhoods' population density decreases.**

In this section, the analysis so far focused on population density and overcrowding. Next, race and ethnicity are explored for any meaningful patterns that relate to population density, land-use.

The analysis presented in Figure 9 looks at neighborhood level (census tracts) data and examines the relationship between the share of non-Hispanic white residents and population density measured by thousands of people per square mile. To measure the relationship, the analysis employs a local polynomial regression model to allow for greater flexibility and responsiveness to the data; the model functions much like a moving average.

In 2019, the model revealed a practically significant negative relationship. The finding suggests that neighborhoods in Sonoma County with higher levels of population density have lower shares of non-Hispanic white residents. In other words, as population density decreases in a neighborhood the share of non-Hispanic white residents increases. As cities and towns look to density in their prospective housing policies, neighborhoods with higher concentrations of white residents may be considered for additional density.

Figure 9: Relationship between Population Density and Share of White Households by Neighborhood in 2019, Sonoma County

Source: American Community Survey and Decennial Census, Generation Housing

RESIDENTS & THEIR HOMES

GENERATION
HOUSING

HOUSING EXPERIENCE

Maricela Rangel, Petaluma
Mother, School Custodian, Latina

When Maricela and her husband migrated to the U.S. to give their daughters more opportunities in life, they didn't expect housing to be easier for them to attain than their children.

They've lived here 25 years, and 18 years ago they bought their family's humble home in Petaluma, something Marciela said they wouldn't be able to afford at today's high prices. Her worry now is that her four daughters won't be able to live in Sonoma County, where she settled to raise her children and where she would like to stay.

It's hard for Maricela to believe that her daughters — who have degrees and jobs — can't find a place to live. "How could it have been easier for a migrant couple with no job experience and a language and culture barrier, to find a decent place to live, than educated American young adults?"

Even though Marciela and her husband commute outside the county for work, they don't wish to leave their home in Petaluma. As much as they love Sonoma County, Marciela's number one issue with the area is housing. She said it's disappointing, and home and rental prices are ridiculous and way out of reach.

"We got lucky, but the chances are against my daughters and my friends — I don't think they will be as lucky."

RESIDENTS & THEIR HOMES

Key Findings

HOUSEHOLDS WITH CHILDREN

- **All cities and towns in Sonoma County have experienced some measure of decline in the number of households with children over the last two decades.**

- **Sebastopol and Healdsburg experienced the largest declines by nearly 30 percentage points during that time period.**

In this section, we turn to local residents and their homes, exploring household demographics.

Over the last two decades, most cities and towns in Sonoma County have experienced considerable changes in their household composition with respect to children (under age 18).
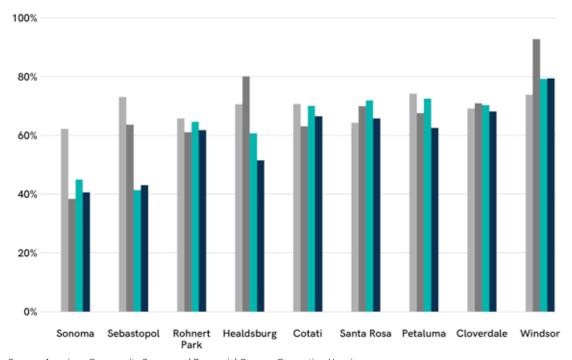
Eight out of nine cities and towns have seen a decrease in the share of households with children in 2019 relative to 2000. The only town that increased during that period, Windsor, grew from 74 percent in 2000 to 79 percent in 2019. However, Windsor also had a significant 14 percentage point decrease from its peak in 2010 when 93 percent of local households had children.

The largest decreases in the share of households with children were in Sebastopol and Healdsburg, where nearly 30 percentage points drops occurred from their peak to today. Sebastopol's drop in the number of household with children went from almost 2,400 to about 1,400 today — a net decrease of about 1,000 households. Only Healdsburg's net decrease was larger in absolute terms with a net decrease of roughly 1,100 households with children during the last two decades.

Just 10 percent of the county's households include children under the age of six.

Figure 10: Share of Households with Children by City, 2000 to 2019

Source: American Community Survey and Decennial Census, Generation Housing

RESIDENTS & THEIR HOMES

Key Findings

FAMILY & SINGLE-OCCUPANCY HOUSEHOLDS

- **The City of Sonoma has the largest share of households in which the householder lives alone at 38 percent of total households.**

- **All cities and towns nearly doubled or tripled in their share of households with a householder living alone in the last twenty years.**

Since 2000, Sonoma County households shifted considerably from being largely composed of family units to having a more diverse set of arrangements. Household with unrelated roommates and those living alone make up a larger share in 2019 than they did at the turn of the century.
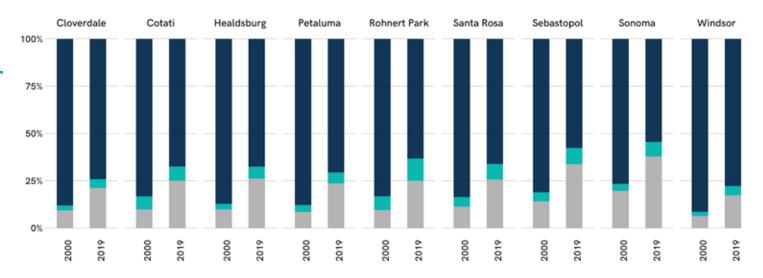
The City of Sonoma currently has the largest share of households in which someone lives alone at 38 percent of total households — an increase from 20 percent in 2000.

All cities and towns, except Windsor, are above 20 percent in its share of households with someone living alone, although all have nearly doubled or tripled over the last two decades.

Figure 11: Households by Type and City, 2000 to 2019

Source: American Community Survey and Decennial Census, Generation Housing

RESIDENTS & THEIR HOMES

Key Findings

SENIORS

- **The City of Sonoma has the largest share of elderly households at roughly 33 percent of the total households — an increase of 65 percent since 2000.**

- **Virtually all cities and towns across the county have seen increases in their senior populations over the last twenty years.**

There's a common pattern in demographic trends across all Sonoma County towns and cities: the percentage of people age 65 or older increased here since 2000.

The elderly make up the largest share of the City of Sonoma's population, accounting for roughly 33 percent of the city's total population — nearly a 65 percent increase from 2000 to 2019.

The lowest share of seniors are in the populations of Cotati and Rohnert Park, home to Sonoma State University. Even so, there was still a large increase there. In Cotati, for example, the share of seniors in its population increased by about 167 percent since 2000.
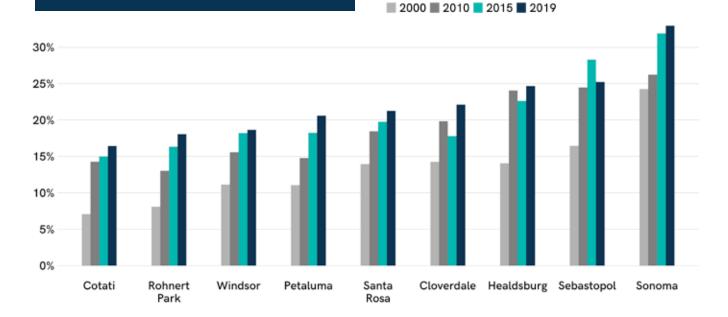
Figure 12: Share of Population Aged 65 or Older by City, 2000 to 2019

Source: American Community Survey and Decennial Census, Generation Housing

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RESIDENTS & THEIR HOMES

Key Findings

FOREIGN BORN RESIDENTS

- **20 percent of Santa Rosa's population is foreign born, the largest share for an individual city in the county.**

- **Seven of the nine cities and towns had an increase in their share of foreign born residents over the last two decades with the exception of Healdsburg and Petaluma.**

Foreign born residents made up an increasingly larger share of the local population by city since 2000. The largest city in the county, Santa Rosa, has the largest share of foreign born residents for an individual city with over 20 percent of its population born abroad.
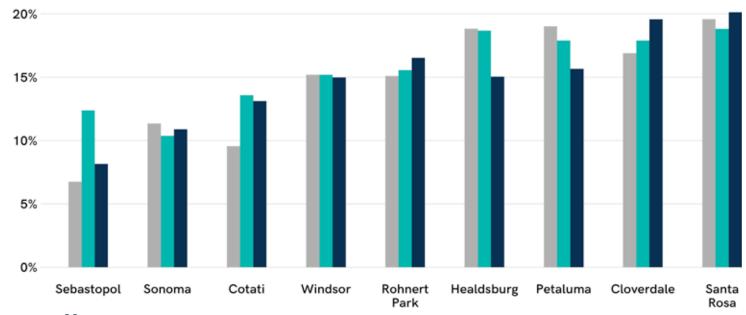
Cities like Healdsburg and Petaluma, however, had their population share of foreign born residents decrease since 2000.

Conversely, Sebastopol and Sonoma have the smallest shares of their city's population as foreign born at about 10 percent or lower.

Figure 13: Share of Foreign Born Population by City, 2010 to 2019

Source: American Community Survey, Generation Housing

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RESIDENTS & THEIR HOMES
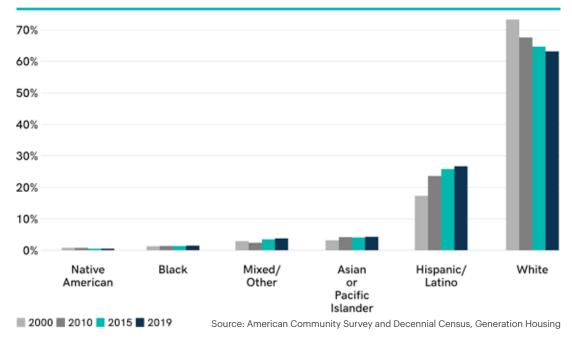
Key Findings

POPULATION BY RACE & ETHNICITY

- **In 2000, three in four Sonoma County residents were white non-Hispanic; in 2019, that share shifted to less than two in three, or about 63 percent.**

- **Simultaneously during that time period, Latino residents increased in population share from 17 percent in 2000 to nearly 27 percent in 2019.**

Figure 14: Share of Population by Race and Ethnicity, 2000 to 2019

■ 2000 ■ 2010 ■ 2015 ■ 2019

Source: American Community Survey and Decennial Census, Generation Housing

Demographic change in Sonoma County over the last two decades by race/ethnicity was largely seen by white and Hispanic/Latino populations.

In 2000, three in four residents were white non-Hispanic residents; in 2019, that share has shifted to less than two in three, or about 63 percent.

Simultaneously during that time period, Latino residents increased from 17 percent of the population in 2000 to nearly 27 percent in 2019.

Asian or Pacific Islander residents increased in their population share over in the last twenty years by roughly a 48 percent increase; from about 14,600 to 21,500 residents. The share of Black residents increased slightly by about 1,300 new Black residents during this period. The number of Native American residents, however, decreased from about 3,500 in 2000 to roughly 2,300 in 2019.

RESIDENTS & THEIR HOMES

Key Findings

EDUCATIONAL ATTAINMENT

- **All Sonoma County cities and towns, except Cotati, have increased the percentage of their residents with college educations.**

- **Sebastopol, along with Healdsburg, Sonoma, and Petaluma, each have college educated rates of 40 percent and higher — the highest in the county.**

All but one of Sonoma County cities and towns increased their share of college educated residents. "College educated" is defined as having at least a bachelor's degree, graduate or professional degree. The exception of Cotati is likely due to enrollment growth at Sonoma State University.
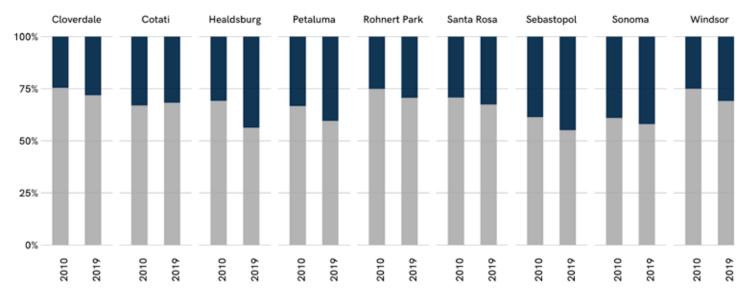
In 2019, Sebastopol had the highest percentage of residents aged 25 years and over with a college degree at 45 percent. This is a moderate percentage increase from 2010 when the share was about 39 percent.

Sebastopol, along with Healdsburg, Sonoma, and Petaluma, each have college educated rates of 40 percent and higher.

Figure 15: Population Aged 16 or Older by Educational Attainment Level, 2010 to 2019

Source: American Community Survey and Decennial Census, Generation Housing

RESIDENTS & THEIR HOMES

Key Finding

AREA MEDIAN INCOME

- In 2005, Sonoma County had a median household income of about $76,000, then bottomed out in 2011-2012 when household incomes had dropped to less than $67,000 (in 2019 dollars) — a loss of $9,000 for the median household, or about $750 a month. It has since rebounded and surpassed Great Recession levels.

Sonoma County's households, and California as a whole, took a significant financial hit during the Great Recession at the end of the 2000s.
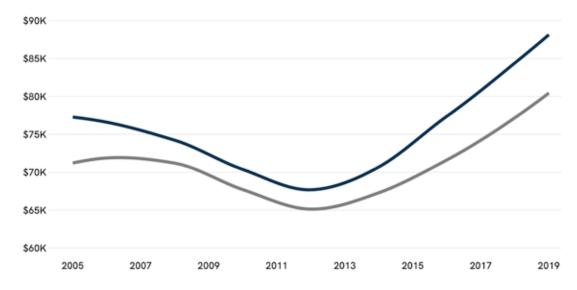
In 2005, Sonoma County had a median household income of about $76,000 and bottomed out in 2011-2012 when household incomes dropped to less than $67,000 (in 2019 dollars) — a loss of $9,000 for the median household, or about $750 a month.

Since then, incomes have not only rebounded but have surpassed pre-Great Recession levels rising to roughly $88,000 in 2019. Throughout the last twenty years, Sonoma County's median household income levels have been above that of California's.

= California = Sonoma County

Figure 16: Inflation-Adjusted Median Household Income, 2005 to 2019

Source: American Community Survey, Generation Housing

RESIDENTS & THEIR HOMES

HOUSING IS RESILIENCE

"Whether it's managing mental illness, the trauma of disasters like wildfires, floods, or pandemics, or just the day-to-day stresses of life, a safe and affordable home provides the stability necessary to be resilient. Our Youth Promotores de Vivienda understand the connection between resilience and housing and are determined to help solve our housing crisis."

—*Stephanie Manieri,
Director of Programs,
Latino Service Providers*

Key Findings

HOME OWNERSHIP BY RACE & ETHNICITY
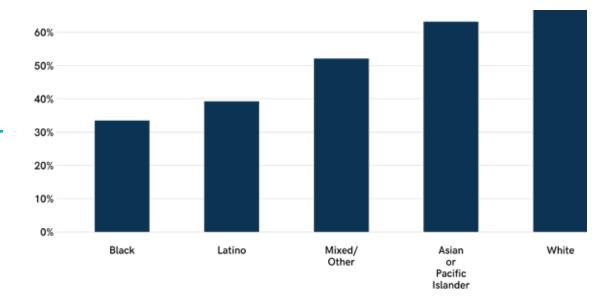
- **Black and Latino homeownership rates are significantly lower than white households at 33 and 39 percent, respectively.**

- **White households are twice as likely to own a home in Sonoma County compared to Black households.**

A home for many Americans is the most valuable asset a household will have in their lifetimes. But the opportunity for homeownership has historically been mired in unjust policies and practices, so disparities in homeownership across the U.S. often reflected those historical patterns.

In measuring Sonoma County's homeownership by race and ethnicity, the data suggests a very similar pattern as Black and Latino homeownership rates are amongst the lowest in Sonoma County compared to white and Asian or Pacific Islander households. White households are twice as likely to own a home than Black households in Sonoma County.

Figure 17: Homeowner-ship by Race/ Ethnicity, Sonoma County 2019

Source: Integrated Public Use Microdata Series (IPUMS), Generation Housing

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RESIDENTS & THEIR HOMES

Key Finding

RENT AFFORDABILITY FOR LOW WAGE WORKERS

- Employees in occupations with lower wages struggle to find housing on the market, with many who need affordable rental housing at or below $1,000 a month; overall median asking rents are double that rent.

Among some of the most common occupations in Sonoma County with wages below the area median income, such as farmworkers and home health and personal care aides workers, rents affordable to them are extremely difficult to locate on the market. Fast food workers, for example, earn $32,154 annually on average, so they need a home to rent for $804 a month or less, as noted on table below. However, Figure 19 on the next page indicates that the overall median asking rent on the market is more than double at $2,063.

Table 5: Average Earnings and Affordable Rent

Average Annual Salary or Wages	Average Affordable Rent Needed
$32,154	$804
$34,930	$873
$36,504	$913
$37,115	$928
$41,381	$1,035

Source: American Community Survey, Generation Housing

Figure 18: Number of Employees by Occupations Below the Area Median Income
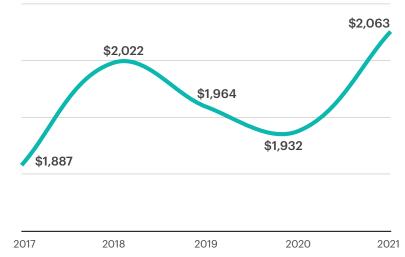
Employees by Occupations Below the Area Median Income

Source: American Community Survey and Decennial Census, Generation Housing

RESIDENTS & THEIR HOMES

Key Findings

MEDIAN RENTS

- **Overall median asking rents in Sonoma County have generally trended upward in the last four years since 2017 despite a brief slight dip in 2019 and 2020.**

- **Current asking rents range from a studio at $1,391 to a four-bedroom home for over $3,000.**

Asking rents, the prices private property owners place on their housing units when available on the market, as opposed to the gross rents paid by tenants under existing or prior arrangements, indicate some level of variation in recent years. Overall median asking rents in Sonoma County on average trended upward but not without a noticeable dip in 2019 and 2020. If the COVID-19 pandemic caused a wane in rents, it did not last long as 2021 saw a resurgence in prices to their highest levels yet with overall median rent at over $2,000 and four-bedroom homes for over $3,000.

Table 6: Overall Median Asking Rents by Housing Units Size, Sonoma County 2021

Housing Unit Size	Median Asking Rent
Overall	$2,063
Studio	$1,391
1 Bedroom	$1,553
2 Bedroom	$2,080
3 Bedroom	$2,687
4 Bedroom	$3,007

Note: Population density – thousands of people per square mile.
Source: Apartment List, Generation Housing

Figure 19: Overall Median Asking Rents, Sonoma County from 2017 to 2021

Source: Apartment List, Generation Housing

$2,063

$2,022

$1,964

$1,932

$1,887

2017   2018   2019   2020   2021

RESIDENTS & THEIR HOMES

Key Findings
RENT BURDEN

- Rent burden is felt most acutely by lower income households. 50 to 80 percent of low to extremely low income renters experience moderate rent burden.

- Severe rent burden affects seven in ten extremely low income renters, and a third of very low income renters.

Definitions

Extremely low income	0-30% of AMI
Very low income	30% to 50% of AMI
Lower income	50% to 80% of AMI; the term may also be used to mean 0% to 80% of AMI
Moderate income	80% to 120% of AMI
Above moderate income	Over 120% of AMI

Figure 20: Rent Burden by Income Type, Sonoma County 2019

Source: Integrated Public Use Microdata Series (IPUMS), Generation Housing

Using the federal and state income limit thresholds based on the area median income, this indicator measures the incidence of rent burden. Rent burden by definition is when a household pays 30 percent or more of their income on housing, and in more severe cases, over half of their income. For tenants, rent burden is not felt equally across households as four in five extremely low and very low income renters pay more than a third of their income on housing. Even more dire, seven in ten extremely low income renters pay more than half of their income on housing while moderate and above moderate renters see negligible levels of severe rent burden.
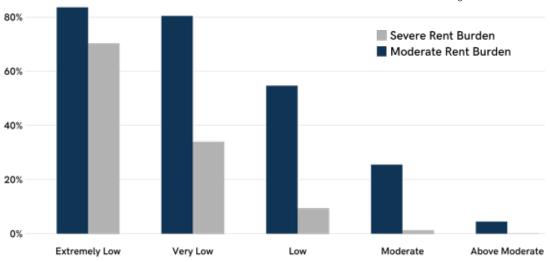
It is important to recognize that while anyone who pays more than 30 percent of their income is considered "cost burdened," the impact of cost burden increases as income decreases. For example, a family with a $100,000 income paying 50 percent of their income on housing is left with $50,000 to meet their other basic needs. A family living on $38,000 paying 50 percent of their income on rent is left with just $19,000 to meet the rest of their needs.

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RESIDENTS & THEIR HOMES

Key Findings

RENT BURDEN DISPARITIES
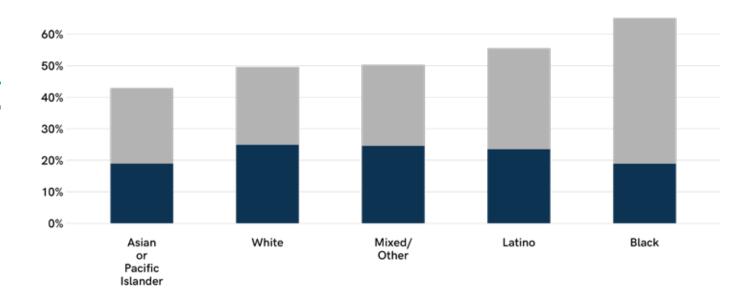
- **Black and Latino renters are disproportionately impacted by moderate and severe rent burden.**

- **65 and 56 percent of Black and Latino renters are cost burdened, respectively.**

The incidence of rent burden by severity and race/ethnicity reveals significant disparities among particular ethnic groups indicating an inequitable impact of the housing crisis on tenants. In particular, the data suggests that more than half of Black and Latino renters experience a range of moderate to severe rent burden. About 65 percent of Black renters in Sonoma County experience rent burden with 19 percent paying more than half of their income on housing. An estimated 56 percent of Latino renters pay too much on housing with 24 percent experiencing severe rent burden, which consumes more than half of their income.

Figure 21: Rent Burden by Race/Ethnicity, Sonoma County 2019

Source: Integrated Public Use Microdata Series (IPUMS), Generation Housing

RESIDENTS & THEIR HOMES

Key Findings

OVERCROWDING DISPARITIES

- Latino and Asian or Pacific Islander renters experience the highest rates of overcrowding with nearly one in four and one in five living in crowded housing conditions, respectively.

- White renter households see the least amount of overcrowding in Sonoma County.

This indicator uses the most commonly accepted definition by the U.S. Department of Housing and Urban Development (HUD) for overcrowding based on 1 person-per-room (PPR), (Blake, 2007). In applying this measurement through a lens of race/ethnicity, the results indicate a considerable disparity in which nearly one in four Latino renters live in overcrowded households. Asian or Pacific Islander renters also see high rates of overcrowding at nearly one in five. Conversely, white renter households experience the least amount of overcrowding at about 3 percent.
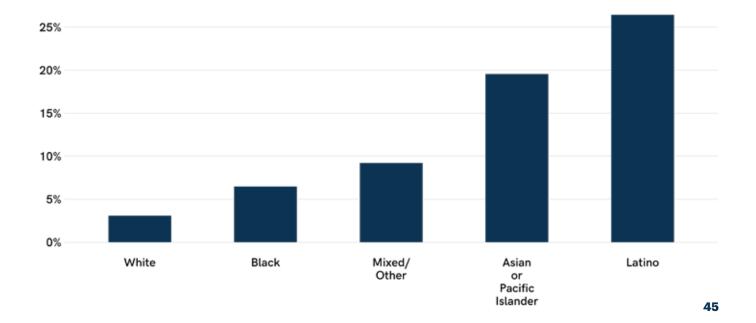
Figure 22: Crowded Housing Conditions by Race/Ethnicity, Sonoma County 2019

Source: Integrated Public Use Microdata Series (IPUMS), Generation Housing

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RESIDENTS & THEIR HOMES

HOUSING IS EDUCATION

"Distance learning during the pandemic opened a window into our students' homes. Every day, teachers saw how their students struggled to learn in unstable, overcrowded, or financially strained households."

—Ed Sheffield, President, Santa Rosa City Schools Board of Education

Key Findings

CHILDREN IN OVERCROWDED HOMES
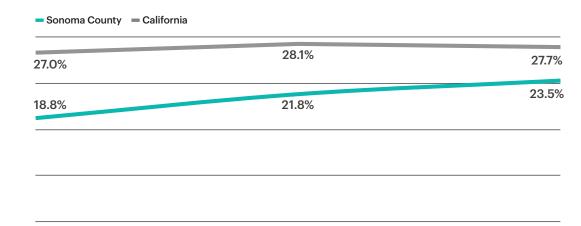
- **The percentage of children living in crowded housing conditions in Sonoma County rose steadily since 2010 at a faster pace than the state average.**

- **The gap between the state average and Sonoma County's was 8.2 percentage points in 2010, but Sonoma County cut that gap in half to 4.2 points in 2018.**

In measuring the percentage of households with children age zero to seventeen living in crowded conditions, the state average for California rose from 2010 to 2014, ranging from 27 to 28.1 percent, and then declined.

The percentage of children living in crowded households in Sonoma County rose from 18.8 percent in 2010 to 23.5 percent in 2018, or about 4.7 percentage points. Despite having a lower overall rate in 2018 than the state, the percentage point increase during the last eight years suggests the rate of overcrowding in Sonoma County is moving at a much faster pace.

Figure 23: Children Living in Crowded Housing Conditions, 2010 to 2018

Source: American Community Survey, Generation Housing

Sonoma County — California

27.0%   28.1%   27.7%

18.8%   21.8%   23.5%

2010   2014   2018

HOMEBUILDING

GENERATION HOUSING

HOUSING EXPERIENCE

Yasmin Sahagun, Petaluma
Student, waitress, Latina

As a 22-year-old dental hygiene student, Yasmin knows what career path she wants to take, but when it comes to housing her future isn't so clear.

For nearly all of her life, she has lived at her parents' home in Petaluma, where her family owns and runs a local restaurant. Her hope is to someday be able to afford to buy a house of her own in Sonoma County, a place she loves for its kind people, wine country living, and open, green spaces like local soccer fields, where she often goes to watch games.

To make her housing dreams a reality, Yasmin is considering asking her parents to buy a new house so that they can copay and live separately. As housing prices continue to increase at alarming highs, Yasmin grows more and more worried about planning for a future in Sonoma County. Although it sometimes feels impossible, Yasmin wants to see her family and friends thrive in the town they grew up in.

"It's really unrealistic for millennials to be able to buy a home. We need to make it more affordable so that we can keep our community here!" she said about the county's state of housing.

HOMEBUILDING

Key Findings

PRODUCTION RATES OVER TIME

- Sonoma County housing production highs since the Great Recession (post 2010) fall short of even the lowest production years in the 1980s and 1990s.

- Sonoma County's homebuilding was strongest in the 1980s and carried through 1990s and 2000s until the Great Recession.

Figure 24: Building Permits in Sonoma County, 1980 to 2020

Source: Department of Housing and Urban Development Building Permit Database, Generation Housing

After the early 1980s recession, which brought huge increases in inflation and unemployment, Sonoma County had the largest housing production spike in its history. At its peak in 1985, the county issued 5,809 building permits.

Through the 1990s, Sonoma County permitted homes from a low of 1,487 in 1996 to a high of 3,645 in 1990, and averaged about 2,375 building permits during the decade.

At the start of the new millennium, Sonoma County was permitting homes at or around 2,000 to 3,000 homes every year until the Great Recession. Sonoma County has produced at or less than 1,000 homes each year consistently since 2008 and well into the 2010s. The two spikes in 2018 and 2019 are mostly due to the wildfire rebuilds. In 2018 there were 3,279 total permits issued but only 982 (30 percent) counted towards the RHNA housing goals that were designated as new additional housing.

HOMEBUILDING

"Our future resilience as a community must be centered around a belief that secure housing for all is essential to our collective well-being and sustainability."

—Lisa Carreño, President and CEO, United Way of the Wine Country

Key Findings

VACANCY RATES

- From 2014 to 2019, the rental vacancy rates dropped statewide and locally. Sonoma County's rate decreased from 4.6 percent to 2.9 percent.

- Sonoma County's rental vacancy rate declined at a greater pace than California's during that time.
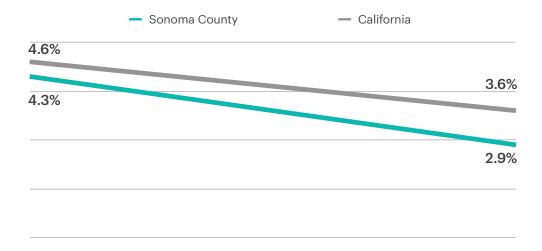
Between 2014 and 2019, the overall vacancy rate for rental housing units in Sonoma County declined by 1.4 percentage point (from 4.3 percent to 2.9 percent). Similarly, the vacancy rate for the State of California also decreased by 1 percentage point from 4.6 percent to 3.6 percent.

The drop in rental vacancy rates in the last several years indicates surging pressure on local and statewide rental housing supply with the pace of increasing pressure most intense in Sonoma County relative to California.

A healthy rental housing market will typically feature a 5 percent rental vacancy rate, which is recommended to ensure an appropriate movement and access for prospective tenants and available units of housing.

Figure 25: Rental Vacancy Rates for Sonoma County and California, 2014 to 2019

Source: American Community Survey, Generation Housing

Legend: Sonoma County, California

- 4.6%
- 4.3%
- 3.6%
- 2.9%

2014 — 2019

HOMEBUILDING

Key Findings

RHNA REQUIREMENTS

- **Nearly every city in the county will need to build significantly more housing at all income levels by 2031.**

- **Cities like Petaluma, Rohnert Park, Windsor, and Healdsburg's Regional Housing Needs Allocation (RHNA) housing goals have nearly or more than doubled in the upcoming eight-year cycle from 2023 to 2031.**

For over fifty years, California mandated all cities properly plan to accommodate growth by building new housing. The State and regional councils of government determine an amount of needed housing with each city and county (or jurisdictions) receiving a Regional Housing Needs Allocation or RHNA (pronounced "ree-nah"). This allocation, determined every eight years, identifies the bare minimum amount of housing needed to support the ever-changing and dynamic needs of our housing market. Once the RHNA determination is adopted, each jurisdiction must then create a planning document known as a Housing Element that illustrates how they'll meet its RHNA.

For the upcoming sixth RHNA cycle (2023-2031), the State of California directed Sonoma County jurisdictions to meet increased housing goals that more accurately reflect the severity of the housing shortage across all levels of affordability. Our report, 58,000 Homes: The Roadmap, is a more accurate reflection of our current needs and our needs over the coming decade.
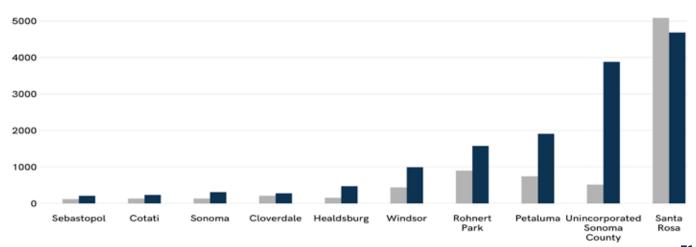
Figure 26: Housing Goals for Sonoma County Cities and County by RHNA Cycle, 2015-2023 and 2023-2031

Note: Draft Regional Housing Needs Allocations according to the Association Bay Area of Governments as of May 2021. Source: California Department of Housing and Community Development, Generation Housing

HOMEBUILDING

Key Findings
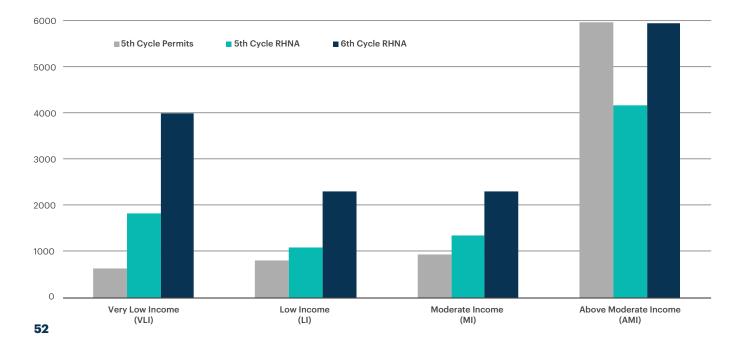
RHNA REQUIREMENTS

- **Jurisdictions in Sonoma County far exceeded the Above Moderate Income (AMI) RHNA target, according to the Annual Progress Reports (July 30, 2021).**

- **Sonoma County jurisdictions continue to struggle with meeting moderate, low, and very low RHNA targets.**

For jurisdictions that did not issue enough permits for housing to keep pace consistent with RHNA building goals, a developer can elect to use a ministerial process to get project approval for residential projects that meet certain conditions. This, in effect, makes it easier to build housing in places that are not on target to meet their building goals. As part of the 2021-2022 state budget, the California Department of Housing and Community Development (HCD) received additional staff resources to expand its accountability efforts which subsequently led to the formation of the Housing Accountability Unit. The primary purpose of this entity will be to hold jurisdictions accountable for their housing element commitments and to enforce state laws on housing.

Figure 27: Fifth Cycle Permits Relative to Fifth and Sixth Cycle RHNA Targets

Source: California Department of Housing and Community Development, Annual Progress Reports, Generation Housing

Legend: 5th Cycle Permits, 5th Cycle RHNA, 6th Cycle RHNA

Categories: Very Low Income (VLI), Low Income (LI), Moderate Income (MI), Above Moderate Income (AMI)

HOMEBUILDING
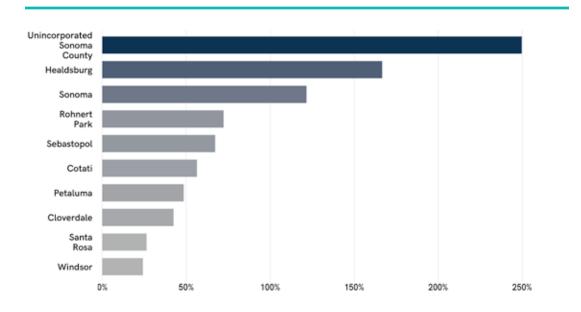
Key Findings

RHNA AFFORDABLE HOUSING GOALS

- Most cities in Sonoma County remain short on achieving their affordable housing goals, although time remains in the current cycle for cities to achieve their goals.

- Unincorporated Sonoma County has performed the strongest. For example, its low income target is thirty-seven units for the entire cycle but has 283 units to date (765 percent).

Figure 28: Progress Towards Affordable Housing Goals for Fifth RHNA Cycle, 2015-2023

Source: California Department of Housing and Community Development, Annual Progress Reports, Generation Housing

As part of the RHNA housing goals, cities and unincorporated jurisdictions are expected to build a portion of the overall total as affordable for moderate, low, and very low income households. Cities receive specific goals for each income group. Figure 28 summarizes total building permits issued for local jurisdictions that are classified as affordable as compared to the total affordable goal. The percentage reflects progress through 2020 in the current RHNA cycle with two more years remaining.

HOMEBUILDING

Key Findings

EXCLUSIONARY ZONING

- **The vast majority of land in Sonoma County's cities are zoned exclusively for single family homes.**

- **Over 80 percent of Healdsburg, Windsor, and Santa Rosa are zoned exclusively for single family homes. Cotati and Rohnert Park have the lowest percentages of exclusionary zoning.**

Figure 29: Share of Zoning Capacity, Single family Only by Sonoma County City

Exclusionary zoning is the use of zoning ordinances to exclude certain types of land uses from a given community. Exclusionary zoning was introduced in the early 1900s, typically to prevent racial and ethnic minorities from moving into middle- and upper-class neighborhoods. In the United States, exclusionary zoning ordinances are standard in almost all communities. Municipalities use zoning to limit the supply of available housing units, such as prohibiting multifamily residential dwellings or setting minimum lot size requirements.

SB9, signed into law in 2021 by California Governor Gavin Newsom, started to chip away at exclusionary zoning at the state level. SB9 eases the path to lot splits and duplexes on many single family home lots.

Research by the Terner Center for Housing Innovation at University of California, Berkeley shows that SB9 will, at best, have a modest impact. The Terner Center estimated that SB9 could, at best, add up to 16,500 more housing units in Sonoma County.

The indicator in Figure 29 shows that Sonoma County is overwhelmingly zoned exclusively for single-family homes.

Source: California Department of Housing and Community Development, Annual Progress Reports, Generation Housing

HOMEBUILDING

Key Finding

ZONING & SEGREGATION

- **Data suggests a positive relationship between intra-city racial segregation and the share of a city's zoning capacity dedicated exclusively to single family only.**

This indicator explores the relationship between intra-municipal segregation and the share of a city's zoning capacity dedicated to only single family. Intra-city segregation, or racial segregation of people between neighborhoods within a city, leverages data from the Othering and Belonging Institute at UC Berkeley, which created an Intra-Municipal Divergence Index to measure segregation. Its data suggest that non-white populations are more likely to live in areas with a high percentage of multifamily zoning. The measurements are applied to Sonoma County cities and found to reflect a similar pattern with a positive relationship between segregation and single family zoning.
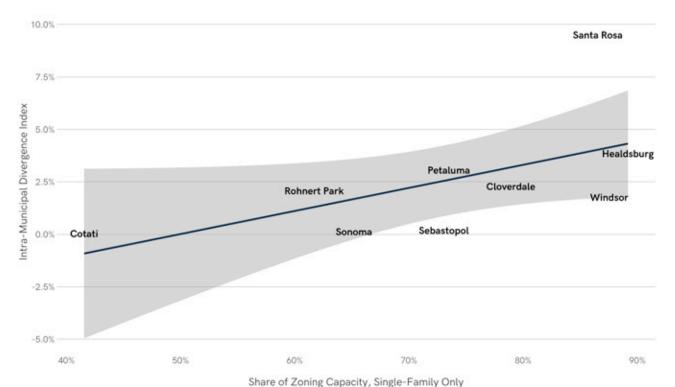
Figure 30: Relationship Between Single Family Only Zoning and Racial Segregation

Source: Othering and Belonging Institute at UC Berkeley

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HOMEBUILDING

"Every day our clinicians see the profoundly harmful impact that homelessness, housing insecurity, and overcrowding have on the physical and mental health of people in our community. People often forgo critical medications and treatment because the high cost of housing makes other essential care unaffordable. An investment in safe, stable, and affordable housing is tantamount to investment in good health."

—*Naomi Fuchs, CEO,*
  Santa Rosa Community Health

Key Finding

JOBS-TO-HOUSING

- **Sonoma and Sebastopol top the list with jobs-to-housing ratios above 1.4, though well below the region with cities like San Francisco and San José producing more than three jobs for every permitted home.**

Measuring the ratio of jobs-to-housing can offer a glimpse into how well cities are balancing the two, and although imperfect, ratios that are too skewed in either direction can indicate an opportunity for action. Figure 31 ranks local jurisdictions based on this jobs-to-housing ratio with the higher the ratio the higher number of jobs to housing.

The cities on the high end of the ratio like Sonoma and Sebastopol, however, still rank well below cities like San Francisco and San José who have consistently produced more than three jobs for every home built.
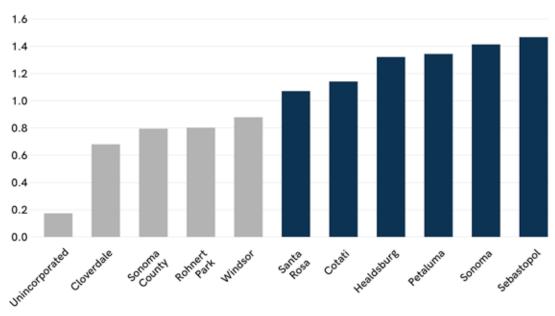
Figure 31: Ratio of All Jobs to Homes

Source: California Department of Housing and Community Development, Annual Progress Reports, Generation Housing

HOMEBUILDING

Key Findings
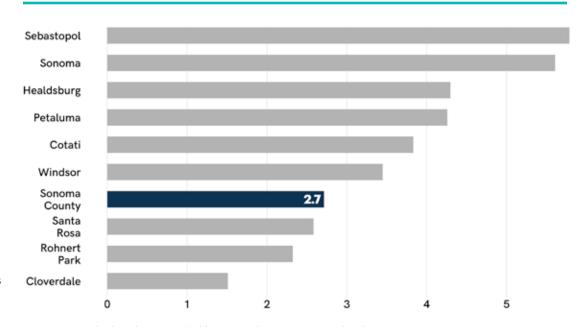
LOW-WAGE JOBS-TO-HOUSING

- **Sonoma County has an average of 2.7 low-wage jobs for every one affordable home.**

- **Sonoma and Sebastopol have more than five low-wage jobs for every affordable home, indicating that more affordable homes are desperately needed in these two cities to meet the need of lower income households.**

The imbalance in overall jobs-to-housing for Sonoma County cities is marginal relative to San Francisco and San José where job growth significantly outpaces housing production. But when drilling down into the ratio of affordable housing relative to low-wage jobs, the ratio increases considerably. The proliferation of lower salaried jobs in sectors such as hospitality and agriculture, which are a sizable percentage of total jobs in Sonoma County, reflect a challenge of producing sufficient affordable jobs to meet the demand.

Sebastopol and the City of Sonoma rank among the top of the list with the highest imbalance in terms of having significantly more low-wage jobs than affordable homes. Low-wage jobs are defined as earning less than $3,333 a month and affordable housing is deemed affordable at the 80 percent of area median income or lower mark.

Figure 32: Low-Wage Jobs-to-Housing

Source: Longitudinal Employer-Household Dynamics (U.S. Census Bureau) and American Community Survey, Generation Housing

HOMEBUILDING

Key Findings

PROPERTY VALUE

- **Sonoma County's land value of a quarter acre lot increased about 118 percent from 2012 to 2018 — with nearly all counties in the Bay Area doubling in land value.**

- **The cost of land as a share of the property value at 35 percent in Sonoma County is lower relative to other counties.**

Residential land values in Sonoma County trended upward in tracking with the rest of the Bay Area. Every county except Marin saw land values more than double from 2012 to 2018. In comparison, land values in Mendocino and Lake counties increased 31 percent and 8 percent respectively, which suggests the rapid pace of regional land values within the Bay Area have been spiking.

Despite the significant increase in property values, the cost of land relative to the overall property value remains lower in Sonoma County at around 35 percent, which may indicate that the cost of land in Sonoma County may be less of an impediment to homebuilding compared to other counties like San Francisco.

Table 7: Land Values by 1/4 Acre and Land Share of Property Values by Bay Area County, 2012 to 2018

	2012 Land Value (1/4 Acre Lot)	2018 Land Value (1/4 Acre Lot)	Percentage Change of Land Land Value, 2012 to 2018	Average Land Value (1/4 Acre Lot)	Average Land Share of Property Value
Alameda County	$267,500	$599,900	124.3%	$432,871	46.7%
Contra Costa County	$163,100	$346,600	112.5%	$261,386	39.1%
Marin County	$450,400	$763,200	69.4%	$613,243	49.7%
Napa County	$153,000	$325,500	112.7%	$233,429	35.5%
San Francisco County	$903,200	$1,946,000	115.5%	$1,453,086	60.7%
San Mateo County	$586,900	$1,301,200	121.7%	$927,243	69.9%
Santa Clara County	$564,000	$1,268,000	124.8%	$878,614	66.1%
Solano County	$56,400	$134,800	139.0%	$96,971	23.8%
Sonoma County	$128,100	$278,600	117.5%	$206,971	34.7%

Note: Land price series data represents land underneath single-family structures only (as opposed to vacant, commercial, or multifamily). Source: Morris A. Davis, William D. Larson, Stephen D. Oliner, Jessica Shui, "The Price of Residential Land for Counties, ZIP Codes, and Census Tracts in the United States," Federal Housing Finance Agency, February 2020

APPENDICES

DATA SOURCES

United States Census Bureau

This report presents a series of indicators that are analyzed using data sourced from the United States Census Bureau, including the Decennial Survey, American Community Survey, and the Longitudinal Employer-Household Dynamics survey.

Decennial Census

The Decennial Census has been the primary mechanism by which the U.S. government collected data every 10 years about its citizens in the 20th century. This report uses data from the Decennial Census largely for the year 2000.

American Community Survey (ACS)

The U.S. Census Bureau began development of the American Community Survey (ACS) in 1996 but did not become a viable option with reliable population estimates until 2005. The indicators in this report include ACS data for 2005 to 2019.

Longitudinal Employer-Household Dynamics (LEHD)

The indicator on jobs and housing uses LEHD data that combines several federal, state, and Census Bureau data to offer insights about the economy. OnTheMap data on jobs was used from LEHD for this report. Low-wage jobs are defined as earning less than $3,333 a month.

U.S. Department of Housing and Urban Development (HUD) Building Permit Database

Homebuilding indicators use HUD data to present privately-owned residential construction. HUD collects this data from permit-issuing entities across the U.S. on a monthly and annual basis since 1959.

Residential Zoning, Othering and Belonging

The indicator on population density adjusted for residential zoned land leverages data from the Othering and Belonging Institute (O&B). The data was made available as part of their Racial Segregation in the San Francisco Bay Area publication series from 2019 to 2021, in which data from General Plans and related planning documents were measured using GIS tools to quantify the land area by zoning designations.

Regional Housing Needs Allocation (RHNA) and Annual Progress Reports (APR)

Indicators on local housing goals and progress towards those goals use data from the California Department of Housing and Community Development (HCD).

Federal Housing Financing Agency

The indicator on land values uses data from a FHFA staff working paper published in 2020 by Morris A. Davis and coauthors entitled, "The Price of Residential Land for Counties, ZIP Codes, and Census Tracts in the United States."

Integrated Public Use Microdata Series (IPUMS)

IPUMS USA collects, preserves and harmonizes U.S. census microdata and provides easy access to this data with enhanced documentation. Data includes decennial censuses from 1790 to 2010 and American Community Surveys (ACS) from 2000 to the present. Steven Ruggles, Sarah Flood, Sophia Foster, Ronald Goeken, Jose Pacas, Megan Schouweiler and Matthew Sobek. IPUMS USA: Version 11.0 [dataset]. Minneapolis, MN: IPUMS, 2021. https://doi.org/10.18128/D010.V11.0

Blake Study

Kevin S. Blake, "Measuring Overcrowding in Housing," U.S. Department of Housing and Urban Development, September 2007.

ApartmentList.com

Apartment List publishes monthly rent reports that examine key trends in cities and states across the nation. Their research helps renters, owners, and the broader research community better understand how the rental market is evolving in real time.

ABOUT GENERATION HOUSING

Our Story

Generation Housing is an independent nonprofit organization created in the wake of the 2017 Sonoma Complex Fires to advocate for more diverse housing at all income levels in Sonoma County. Despite some policy advancements, there are still roadblocks and opposition to the development of much-needed housing. Generation Housing was incubated and is directed by cross-sector leaders representing healthcare, education, environment, and business who agree that a housing advocacy organization to promote housing policy and educate the public is a crucial missing component in our local housing development.

Generation Housing educates policymakers and the public about this critical intersectional relationship between housing and quality of life to increase public and political will for housing development, and to inspire and activate a counter voice to NIMBYism. Generation Housing rallies support for smart housing projects and helps to develop and champion solutions that reduce procedural and financial barriers to housing development.

Generation Housing's work is strategically guided by its Mission, Vision, and Guiding Principles, which include values of equity and environmental sustainability, and a commitment to cross-sector collaboration.

Vision

We envision vibrant communities where everyone has a place to call home and can contribute to an equitable, healthy, and resilient Sonoma County.

Mission

Our partnership champions opportunities to increase the supply, affordability, and diversity of homes throughout Sonoma County. We promote effective policy, sustainable funding resources, and collaborative efforts to create an equitable, healthy, and resilient community for everyone.

GENERATION HOUSING

GENERATION HOUSING'S GUIDING PRINCIPLES

PEOPLE

We want all of our neighbors to have a place to call home — a mix of ages, races, ethnicities, and socioeconomic status contributes to Sonoma County's economic and social vibrancy

PLACE

Sonoma County's commitment to vibrant, walkable urban areas, rich agriculture economy, and environmental stewardship requires thoughtful, sustainable housing development

HOUSING OPTIONS

Our community needs a range of housing types, sizes, materials, and affordability levels

SUSTAINABILITY

We support development of energy efficient and climate resilient homes and communities that offer access to jobs, schools, parks, and other needed amenities

IMPACT

Safe, stable, affordable housing near community services is integral to economic mobility, educational opportunity, and individual, family, and community health

COLLABORATION

We are committed to working collaboratively and transparently — conducting positive advocacy, aligning efforts along the points of agreement, and working across sectors to create actionable and lasting solutions

REPORT CONTRIBUTORS

Principal Author — Jesús Guzmán, MPP, Principal, Los Arroyos Consulting Jesús was integral in developing, implementing, and reporting on PolicyLink's first major partnership with the Tableau Foundation using data to advance racial justice in advocacy efforts. Jesús has published articles and research on labor, immigration, and housing in publications such as the Harvard Journal of Hispanic Policy and the Berkeley Public Policy Journal. Jesús received his Bachelor of Arts from Sonoma State University and his Masters in Public Policy from the Goldman School of Public Policy at UC Berkeley.

Joel Mason Batterman, PhD, Policy Consultant, Generation Housing Joel has over a decade of experience in community organizing and public policy, focusing on urban and metropolitan inequality. He founded a transit rider union in Detroit and has published articles in the Detroit Free Press, Progressive Planning and In These Times. He has a bachelor's degree in history from Reed College and a master's and PhD in urban planning from the University of Michigan.

Stephanie Picard Bowen, Operations & Development Director, Generation Housing Stephanie Picard Bowen brings a decade of experience working in the nonprofit world. Prior to her work at Generation Housing, she worked as a Project Manager at a general contracting firm in Sonoma County working with wildfire survivors rebuilding their homes. Stephanie earned a B.A. in anthropology at Saint Mary's College of California.

Melissa Gomez, Communications Coordinator, Generation Housing Melissa received three Associate Degrees in Sociology, Psychology, and Social Sciences from Santa Rosa Junior College in 2018, then transferred to California State University, Long Beach, where she completed a Bachelor of Arts in Sociology in 2020 as a first generation college graduate. Melissa is currently a candidate for a Masters of Science in Gerontology at Cal State Long Beach.

Jen Klose, J.D., Executive Director, Generation Housing Jen worked as a real estate attorney and civil litigator for 15 years prior to the launch of Generation Housing, during which time she facilitated the conversion of the Palms Inn into permanent supportive housing for homeless veterans and vulnerable civilians. Jen served two terms on the Santa Rosa School Board including three years as its board president. Her service included joining the City of Santa Rosa in revising impact fees to spur development in Downtown Santa Rosa. Jen earned a B.S. in Biochemistry from UCLA and her JD from Indiana University, Bloomington.

Susan Minichiello, Technical Writing Consultant, Generation Housing Susan Minichiello is a freelance writer and editor who works with nonprofit organizations, book publishers, newspapers, and magazines. Previously, Susan was the education reporter for The Press Democrat, where her writing was recognized by the California News Publishers Association for two California Journalism Awards. She studied creative writing at the University of Montana-Missoula.

Studio B Design Studio B is a strategic graphic design agency, specializing in integrated marketing campaigns blending print, web, video and digital media. Their goal is to create shifts in perspective and inspire thoughtful action.

Calum Weeks, MPA, Policy Director, Generation Housing Calum brings over 5 years of experience building partnerships among diverse stakeholders in order to help deliver holistic policy solutions. Most recently, he worked for the Bank Information Center (BIC) in Washington D.C. conducting research which sought to identify innovative solutions that would limit the harm multilateral development banks (MDBs) programs and policies have on people and the planet. Calum earned a B.A. at Humboldt State University and his MPA at American University in Washington, D.C.

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GENERATION
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