

Sonoma County Establishment Size Evolution

Focus on Post-Recession Recovery

Q4 –2025 Update

Produced by

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1. Overview of Establishment Size Changes Since the Onset of the COVID Pandemic

Figure 1 - 1: Average Establishment Size

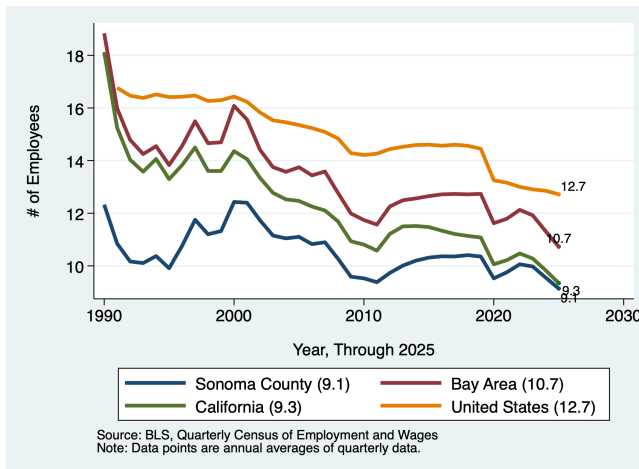


Figure 1 - 2: Growth in Establishment Numbers

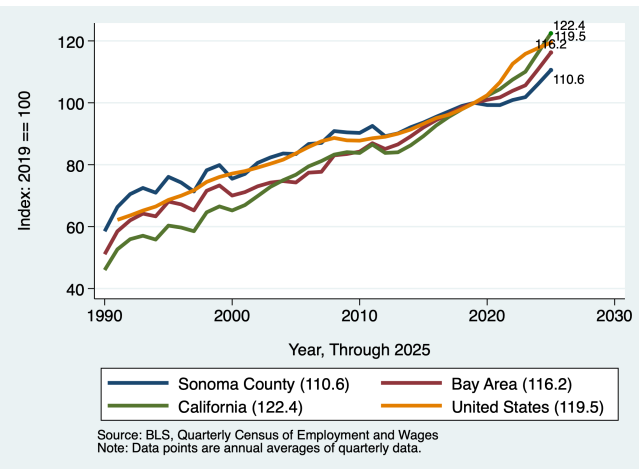


Figure 1 - 3

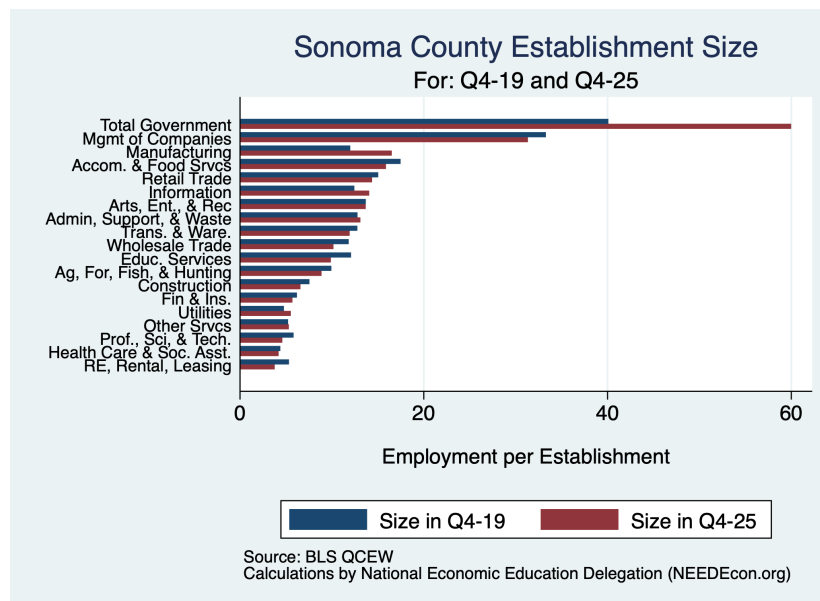


Table 1.1: Quarterly Summary for Q4 –2025

Sector	Levels in Q4 –2025				Change vs Q4 in 2025			
	Establishments		Relative Size		Establishments		Relative Size	
	#	Ave. Size	v. Bay	v. U.S.	#	Ave. Size	v. Bay	v. U.S.
Health Care & Soc. Asst.	8,335	4.2	1.1	0.4	1,903	–0.20	0.10	0.04
Construction	2,409	6.6	0.7	0.8	150	–0.97	0.02	–0.08
Prof., Sci., & Tech.	1,821	4.6	0.4	0.8	162	–1.22	–0.04	–0.01
Retail Trade	1,574	14.4	0.9	1.0	–58	–0.67	0.03	–0.01
Other Srvc	1,458	5.3	1.1	1.0	140	0.08	0.07	0.03
Accom. & Food Srvc	1,329	15.9	1.0	0.9	102	–1.59	0.06	–0.00
Manufacturing	1,050	16.5	0.6	0.5	9	4.52	0.22	0.20
Admin, Support, & Waste	982	13.1	0.7	1.0	109	0.32	0.08	0.22
RE, Rental, Leasing	756	3.8	0.8	0.8	24	–1.56	–0.12	–0.19
Fin & Ins.	606	5.7	0.6	0.5	–109	–0.49	0.05	0.02
Wholesale Trade	566	10.2	0.9	1.1	–74	–1.65	–0.08	–0.17
Ag, For, Fish, & Hunting	549	8.9	0.9	0.8	–10	–1.07	–0.09	–0.02
Total Government	478	60.0	0.7	0.8	–3	19.89	0.02	0.26
Arts, Ent., & Rec	316	13.7	0.9	1.0	35	–0.01	0.11	0.11
Trans. & Ware.	242	11.9	0.6	0.6	4	–0.84	0.03	–0.03
Educ. Services	241	9.9	0.6	0.5	42	–2.20	–0.02	–0.00
Other	205	0.6	0.9	0.6	151	0.41	–0.25	0.46
Information	172	14.1	0.6	1.5	1	1.62	0.19	0.68
Mgmt of Companies	72	31.3	0.3	1.3	7	–1.96	–0.20	0.30
Utilities	23	5.5	0.7	0.2	6	0.76	0.01	0.06
Mining	9	0.0	0.0	0.0	–3	0.00	0.00	0.00
Total	23,193	8.9	0.8	0.7	2,588	–1.48	0.03	–0.01

Source: BLS, QCEW; Calculations by National Economic Education Delegation

2. Relative Establishment Size Over Time

Table 2.1: Summary of Establishment Size versus the Bay Area as A Whole

Sector	Establishments in Q4 – 2025		Relative Establishment Size: Q4 of Each Year					
	#	Ave. Size	1990	2001	2004	2007	2019	2025
Health Care & Soc. Asst.	8,335	4.2	0.74	1.01	0.74	0.76	1.05	1.15
Construction	2,409	6.6	0.62	0.62	0.62	0.61	0.65	0.67
Prof., Sci., & Tech.	1,821	4.6	0.49	0.50	0.57	0.74	0.46	0.42
Retail Trade	1,574	14.4	0.79	0.91	0.92	0.89	0.89	0.92
Other Svcs	1,458	5.3	0.83	0.99	0.87	0.87	1.05	1.12
Accom. & Food Svcs	1,329	15.9	0.83	0.93	0.97	0.93	0.96	1.03
Manufacturing	1,050	16.5	0.55	0.87	0.82	0.71	0.36	0.58
Admin, Support, & Waste	982	13.1	0.48	0.67	0.68	0.62	0.65	0.73
RE, Rental, Leasing	756	3.8	0.58	0.75	0.73	0.74	0.97	0.84
Fin & Ins.	606	5.7	0.71	0.84	0.80	0.68	0.55	0.60
Wholesale Trade	566	10.2	0.76	0.77	0.87	0.95	0.96	0.88
Ag, For, Fish, & Hunting	549	8.9	0.75	0.83	0.76	0.84	0.97	0.87
Total Government	478	60.0	0.47	0.54	0.69	0.67	0.72	0.74
Arts, Ent., & Rec	316	13.7	0.68	0.90	0.78	0.76	0.78	0.89
Trans. & Ware.	242	11.9	0.30	0.44	0.49	0.49	0.59	0.62
Educ. Services	241	9.9	0.54	0.52	0.57	0.64	0.67	0.65
Other	205	0.6		1.17	1.55	0.97	1.13	0.88
Information	172	14.1	0.90	0.85	0.74	0.40	0.38	0.57
Mgmt of Companies	72	31.3	0.30	0.66	0.48	0.54	0.50	0.30
Utilities	23	5.5	0.44	0.76	0.00	0.00	0.73	0.74
Mining	9	0.0	0.51	0.70	1.10	1.47	0.00	0.00

Source: BLS, QCEW; Calculations by National Economic Education Delegation

Table 2.2: Summary of Relative Establishment Size versus California as A Whole

Sector	Establishments in Q4 – 2025		Relative Establishment Size: Q4 of Each Year					
	#	Ave. Size	1990	2001	2004	2007	2019	2025
Health Care & Soc. Asst.	8,335	4.2	0.63	0.97	0.68	0.72	1.16	1.25
Construction	2,409	6.6	0.60	0.63	0.60	0.63	0.73	0.74
Prof., Sci., & Tech.	1,821	4.6	0.52	0.58	0.67	0.95	0.69	0.64
Retail Trade	1,574	14.4	0.83	0.96	0.92	0.91	0.95	0.98
Other Svcs	1,458	5.3	0.87	1.15	1.06	1.04	0.94	1.04
Accom. & Food Svcs	1,329	15.9	0.76	0.87	0.89	0.87	0.92	0.95
Manufacturing	1,050	16.5	0.57	1.04	0.88	0.80	0.43	0.66
Admin, Support, & Waste	982	13.1	0.51	0.56	0.59	0.56	0.62	0.73
RE, Rental, Leasing	756	3.8	0.60	0.76	0.72	0.75	1.03	0.85
Fin & Ins.	606	5.7	0.77	0.92	0.82	0.74	0.62	0.63
Wholesale Trade	566	10.2	0.80	0.87	0.95	1.04	1.13	1.03
Ag, For, Fish, & Hunting	549	8.9	0.58	0.56	0.40	0.41	0.42	0.40
Total Government	478	60.0	0.54	0.52	0.63	0.61	0.66	0.82
Arts, Ent., & Rec	316	13.7	0.86	1.17	0.97	1.02	1.29	1.55
Trans. & Ware.	242	11.9	0.40	0.52	0.55	0.58	0.55	0.67
Educ. Services	241	9.9	0.36	0.56	0.58	0.54	0.60	0.55
Other	205	0.6		0.91	2.21	1.41	0.49	0.79
Information	172	14.1	1.00	1.03	0.81	0.46	0.69	0.90
Mgmt of Companies	72	31.3	0.37	0.76	0.54	0.63	0.62	0.53
Utilities	23	5.5	0.32	0.21	0.00	0.00	0.40	0.52
Mining	9	0.0	0.42	0.74	0.37	0.41	0.00	0.00

Source: BLS, QCEW; Calculations by National Economic Education Delegation

Table 2.3: Summary of Relative Establishment Size versus the United States as A Whole

Sector	Establishments in Q4 – 2025		Relative Establishment Size: Q4 of Each Year					
	#	Ave. Size	1990	2001	2004	2007	2019	2025
Health Care & Soc. Asst.	8,335	4.2	0.47	0.70	0.48	0.53	0.36	0.39
Construction	2,409	6.6	0.72	0.80	0.81	0.82	0.84	0.76
Prof., Sci., & Tech.	1,821	4.6	0.61	0.67	0.75	1.11	0.78	0.76
Retail Trade	1,574	14.4	1.08	1.00	1.01	1.02	0.99	0.98
Other Srves	1,458	5.3	0.63	0.55	0.46	0.43	1.00	1.02
Accom. & Food Srves	1,329	15.9	0.88	0.85	0.88	0.89	0.92	0.92
Manufacturing	1,050	16.5	0.49	0.81	0.66	0.64	0.34	0.53
Admin, Support, & Waste	982	13.1	0.61	0.63	0.67	0.68	0.78	1.00
RE, Rental, Leasing	756	3.8	0.67	0.78	0.76	0.81	0.97	0.78
Fin & Ins.	606	5.7	1.02	0.91	0.86	0.72	0.51	0.53
Wholesale Trade	566	10.2	1.09	1.02	1.11	1.24	1.24	1.07
Ag, For, Fish, & Hunting	549	8.9	0.67	0.80	0.57	0.70	0.85	0.84
Total Government	478	60.0	0.59	0.47	0.55	0.56	0.55	0.81
Arts, Ent., & Rec	316	13.7	0.95	1.06	0.84	0.89	0.92	1.03
Trans. & Ware.	242	11.9	0.49	0.61	0.61	0.66	0.59	0.56
Educ. Services	241	9.9	0.33	0.49	0.50	0.49	0.52	0.51
Other	205	0.6		1.32	2.28	1.17	0.17	0.63
Information	172	14.1	1.07	0.97	0.87	0.51	0.82	1.50
Mgmt of Companies	72	31.3	0.31	1.09	0.72	0.85	0.98	1.28
Utilities	23	5.5	0.17	0.21	0.00	0.00	0.17	0.23
Mining	9	0.0	0.74	1.01	0.45	0.52	0.00	0.00

Source: BLS, QCEW; Calculations by National Economic Education Delegation

3. Detailed Relative Establishment Size Evolution by Industry

Graphs present only Q4 data for each year. Ten largest industries are presented.

Figure 3 - 1: 92: Total Government

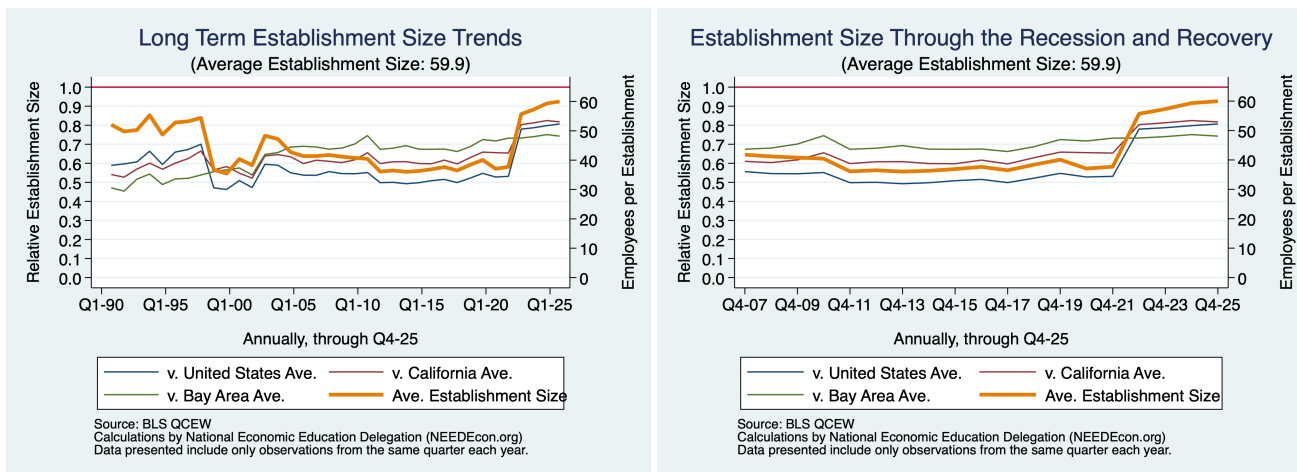


Figure 3 - 2: 55: Mgmt of Companies

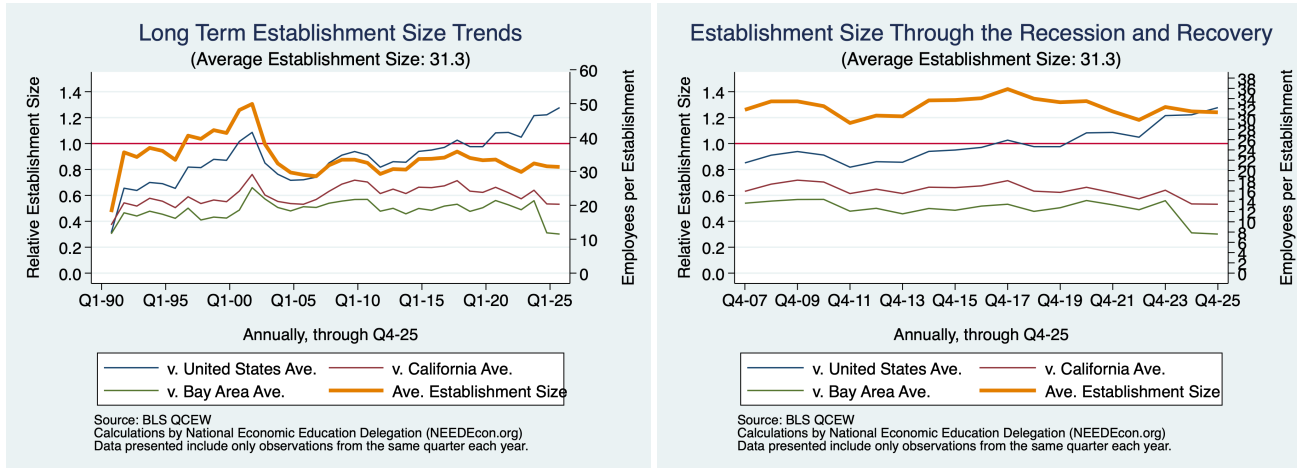


Figure 3 - 3: 31-33: Manufacturing

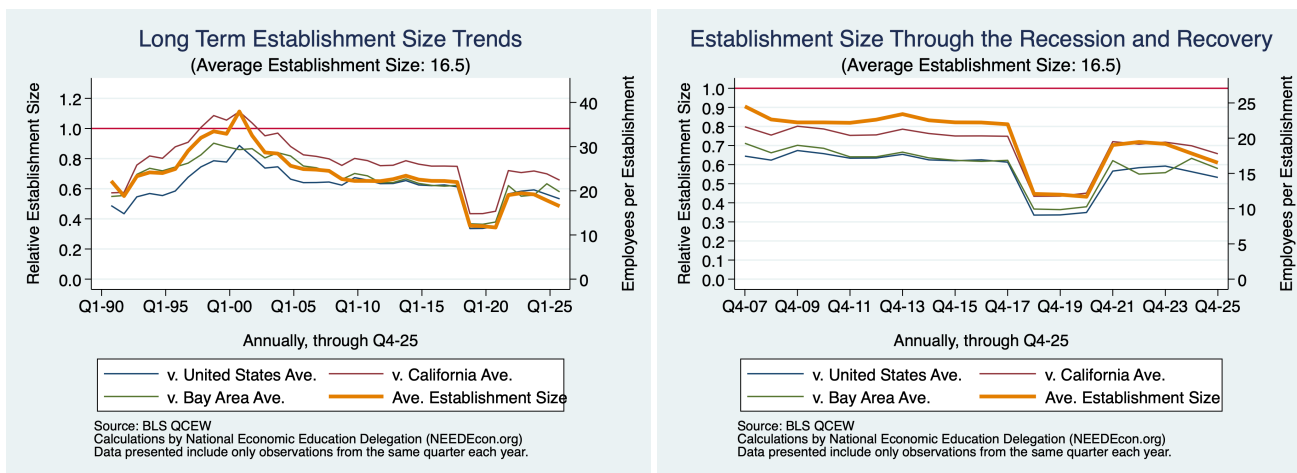


Figure 3 - 4: 72: Accom. & Food Svcs

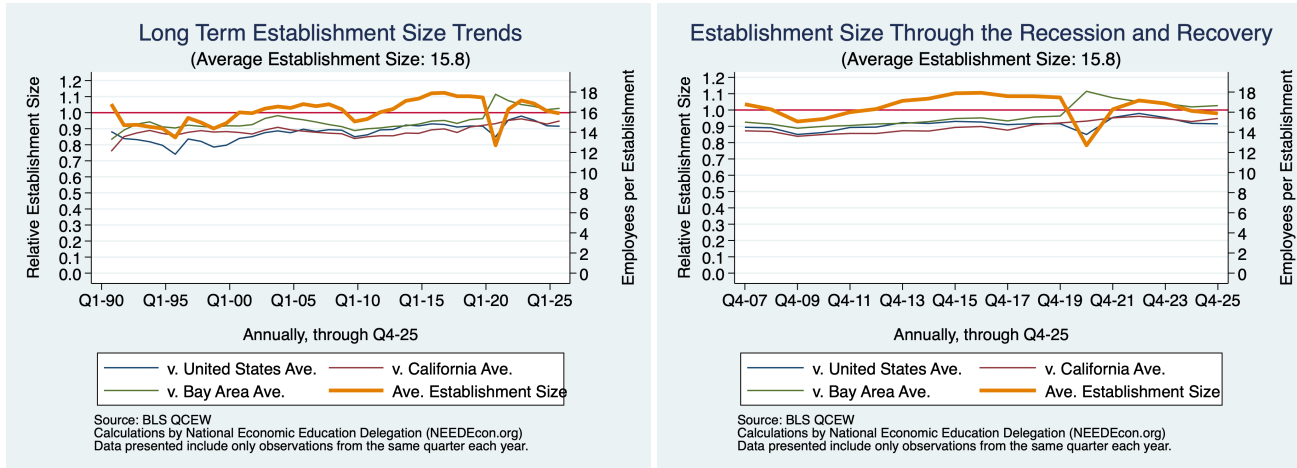


Figure 3 - 5: 44-45: Retail Trade

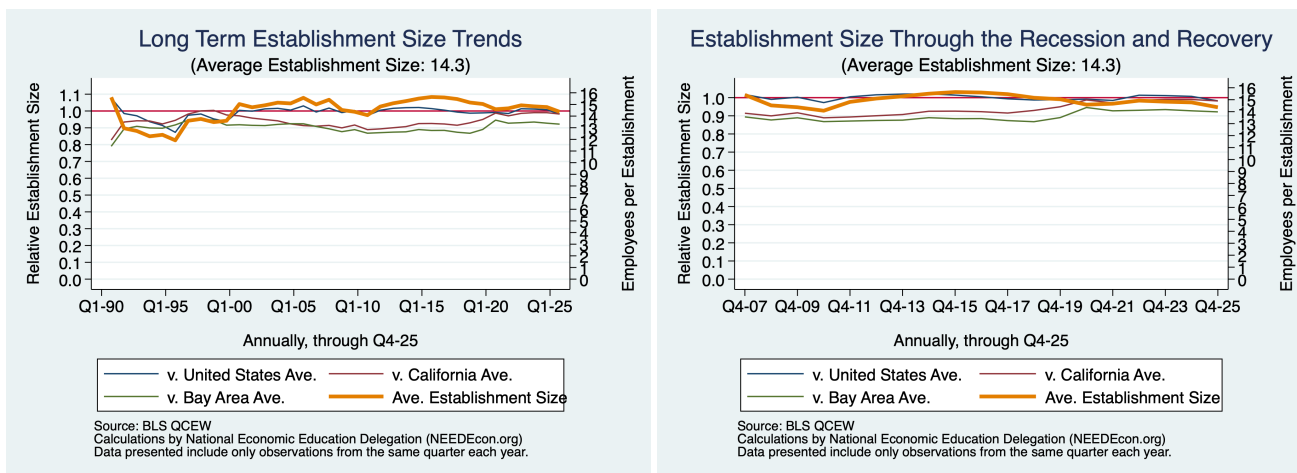


Figure 3 - 6: 51: Information

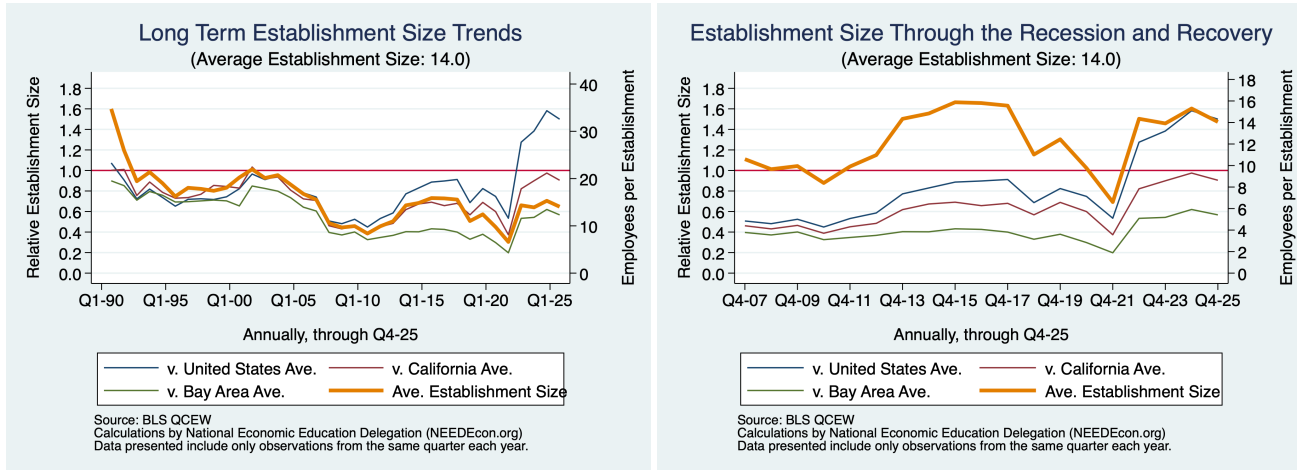


Figure 3 - 7: 71: Arts, Ent., & Rec

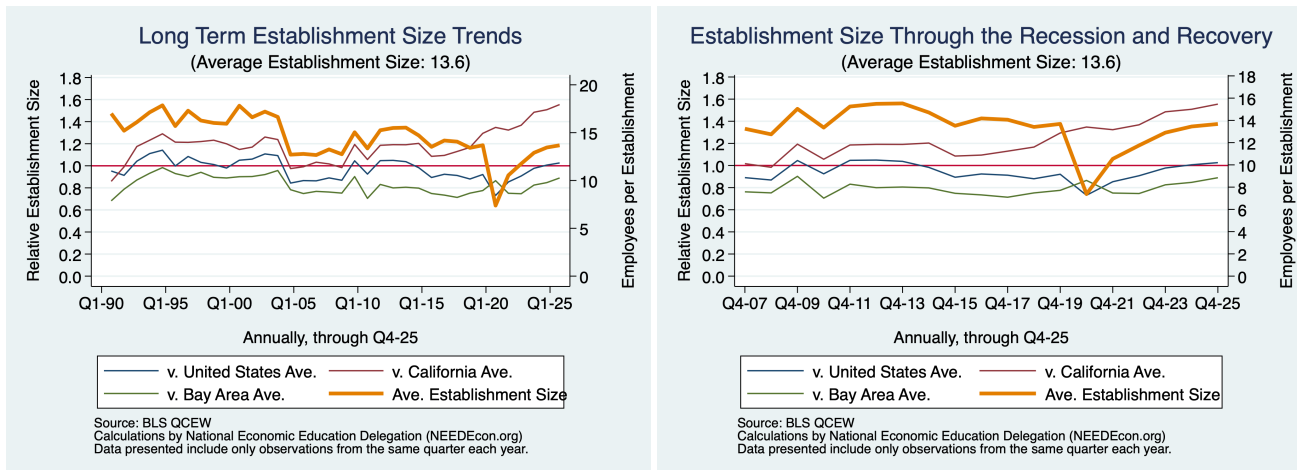


Figure 3 - 8: 56: Admin, Support, & Waste

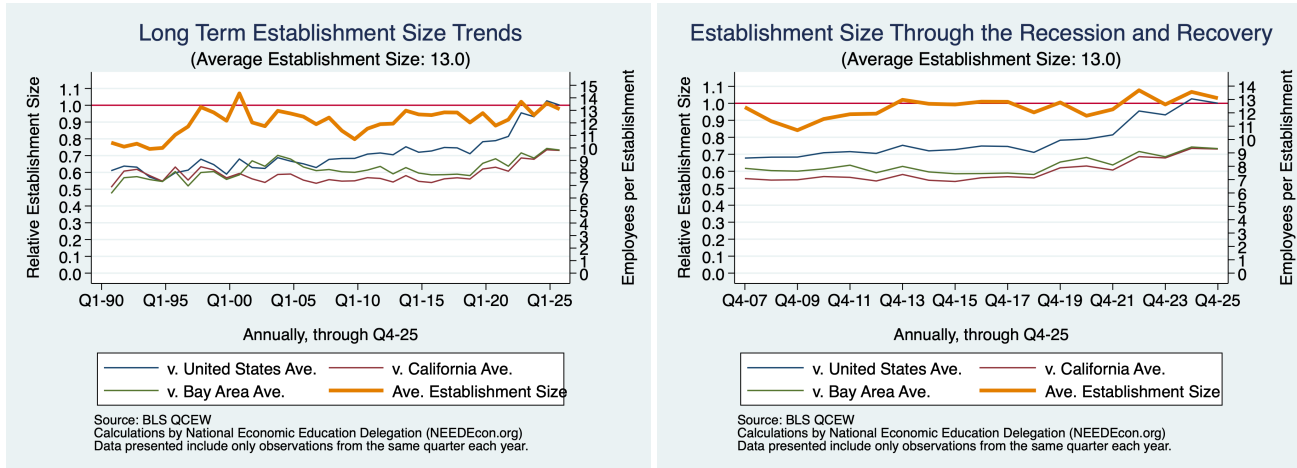


Figure 3 - 9: 48-49: Trans. & Ware.

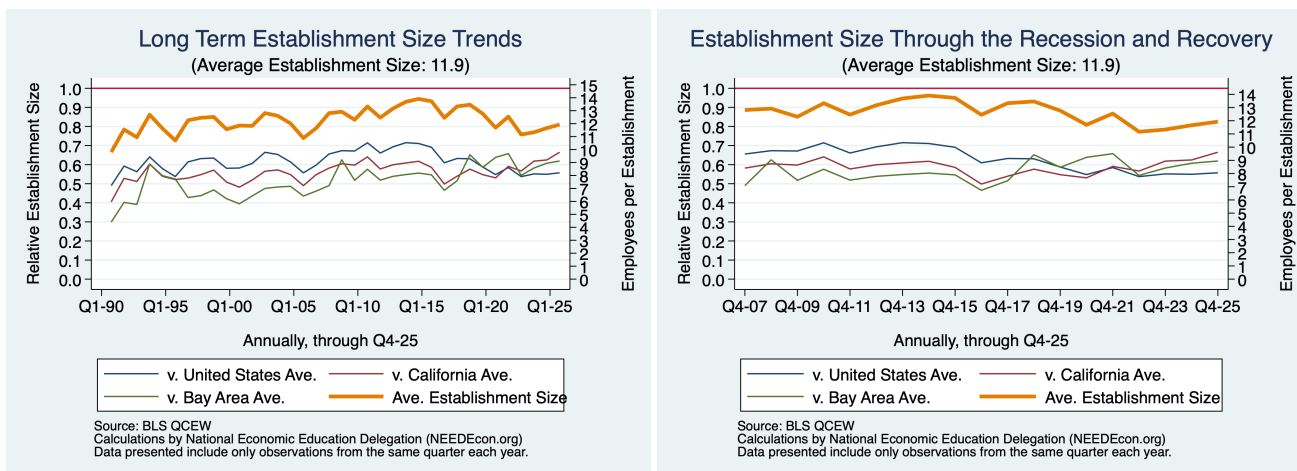
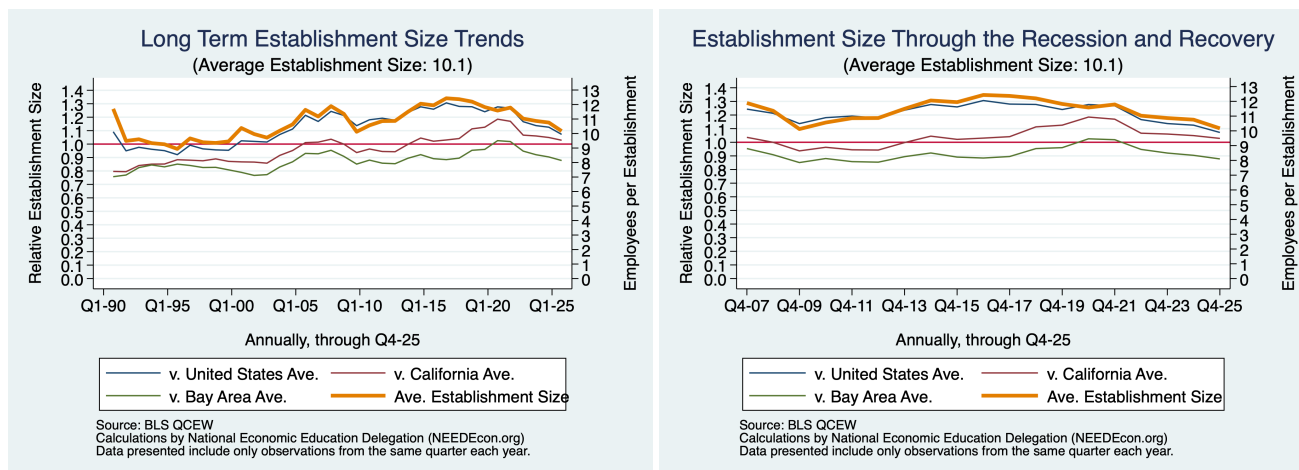


Figure 3 - 10: 42: Wholesale Trade



4. Growth in # of Establishments

Graphs present only Q4 data for each year. Ten largest industries are presented.

Figure 4 - 1: 92: Total Government

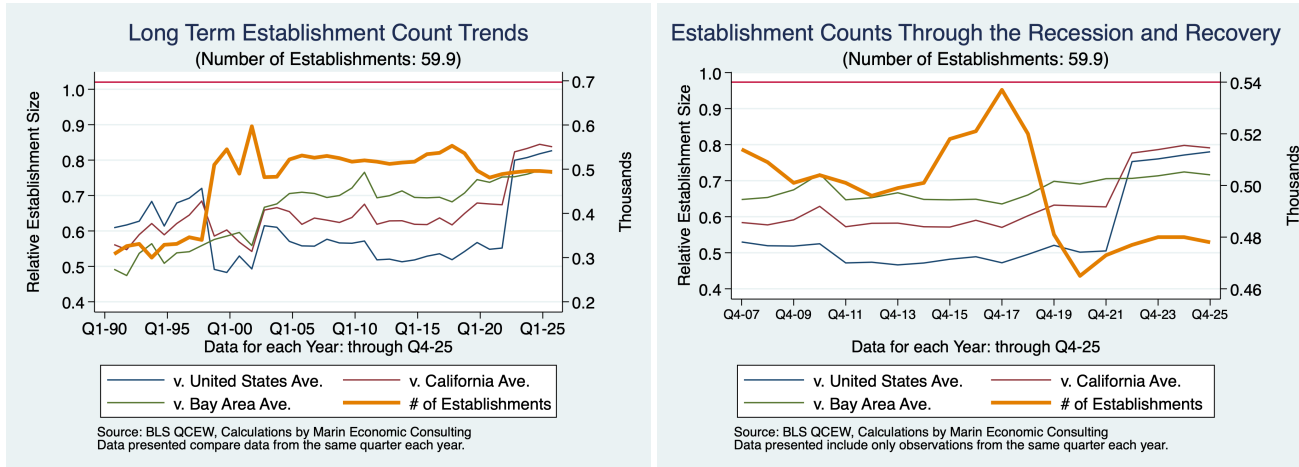


Figure 4 - 2: 55: Mgmt of Companies

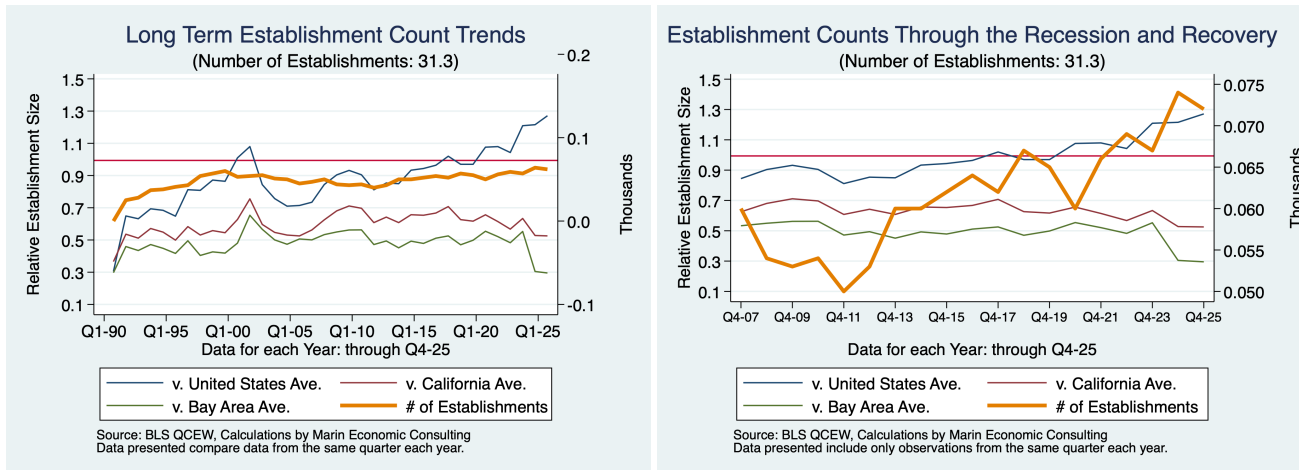


Figure 4 - 3: 31-33: Manufacturing

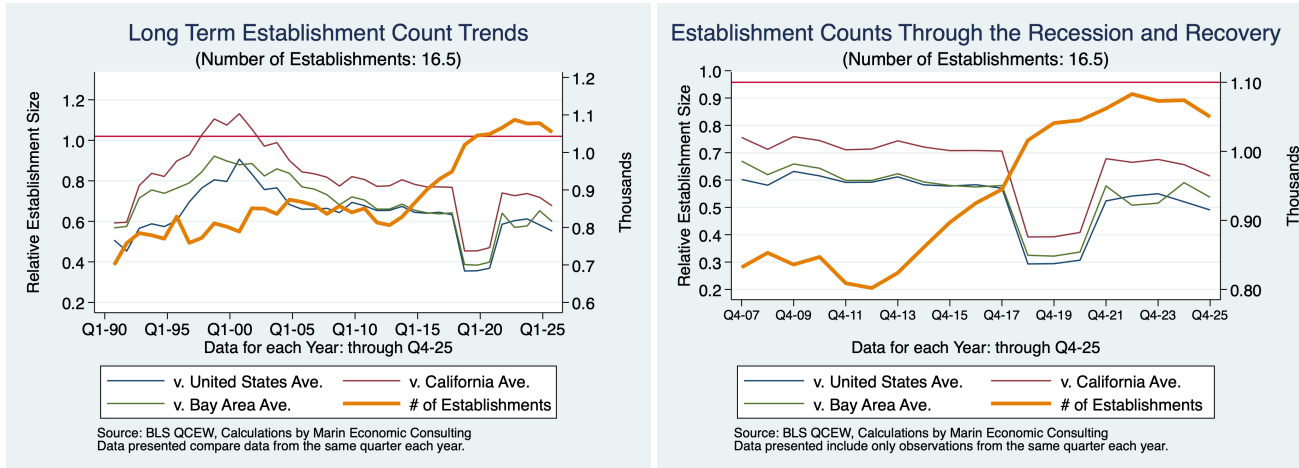


Figure 4 - 4: 72: Accom. & Food Svcs

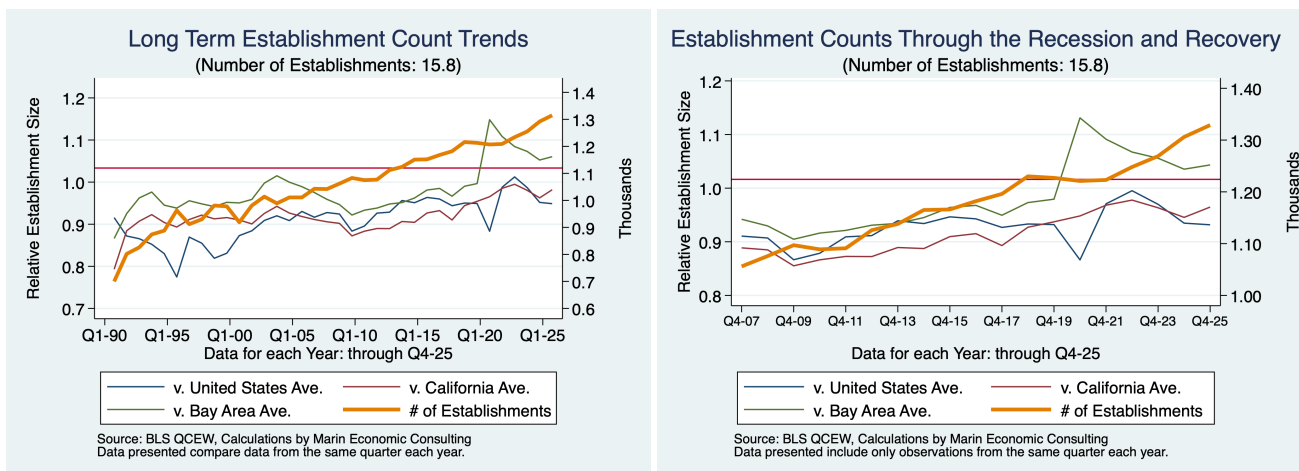


Figure 4 - 5: 44-45: Retail Trade

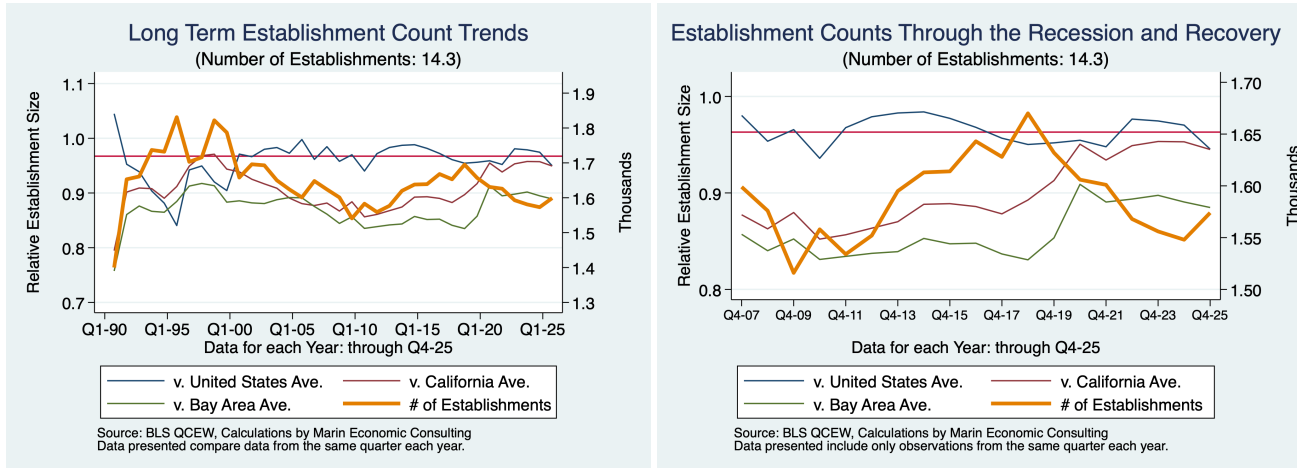


Figure 4 - 6: 51: Information

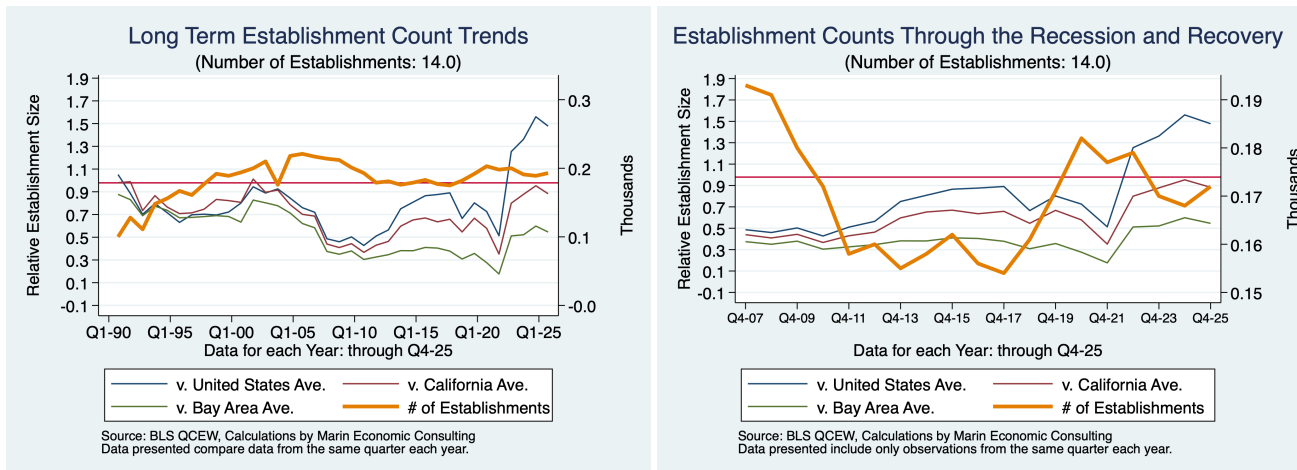


Figure 4 - 7: 71: Arts, Ent., & Rec

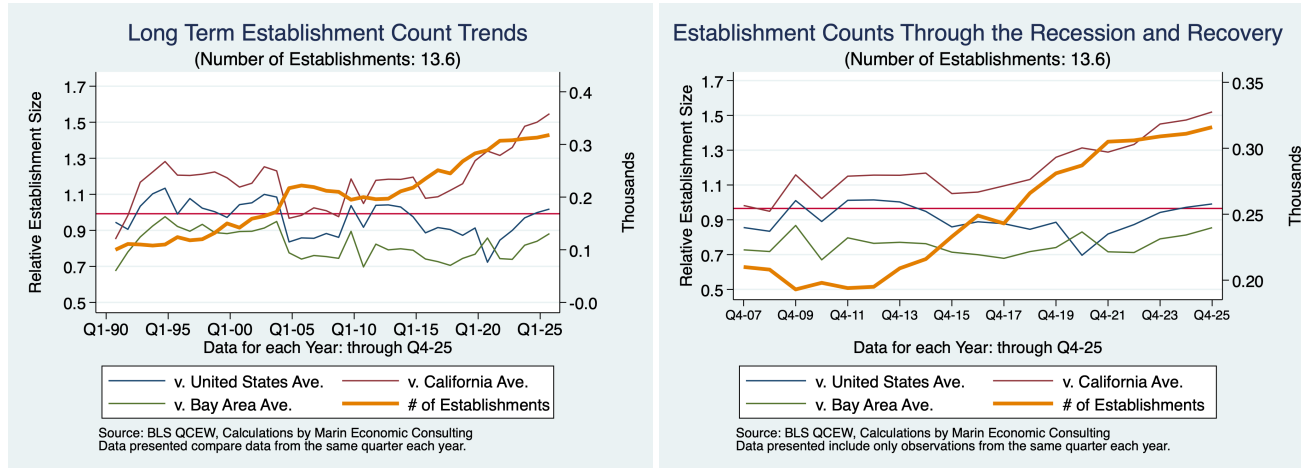


Figure 4 - 8: 56: Admin, Support, & Waste

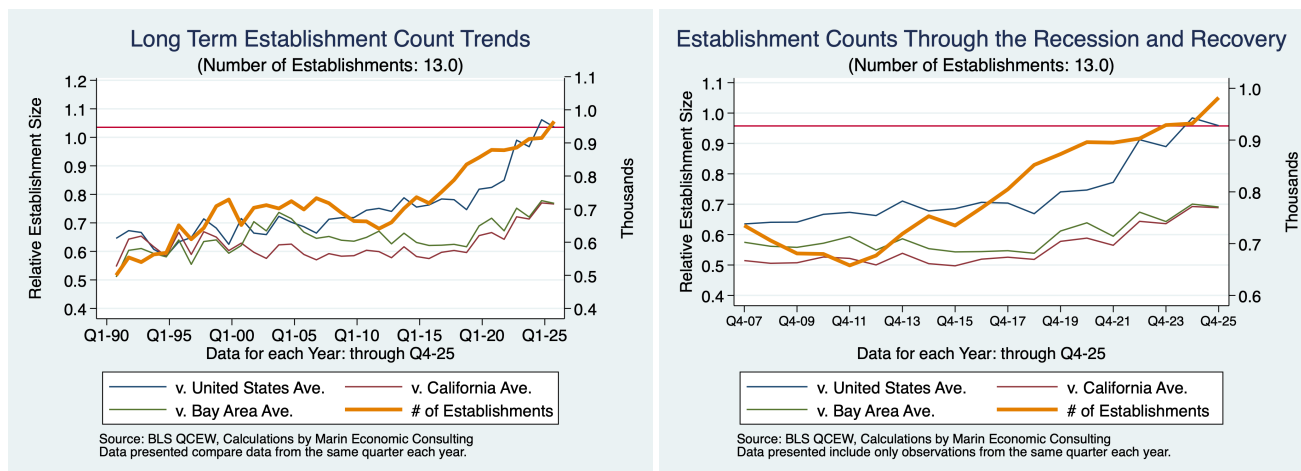


Figure 4 - 9: 48-49: Trans. & Ware.

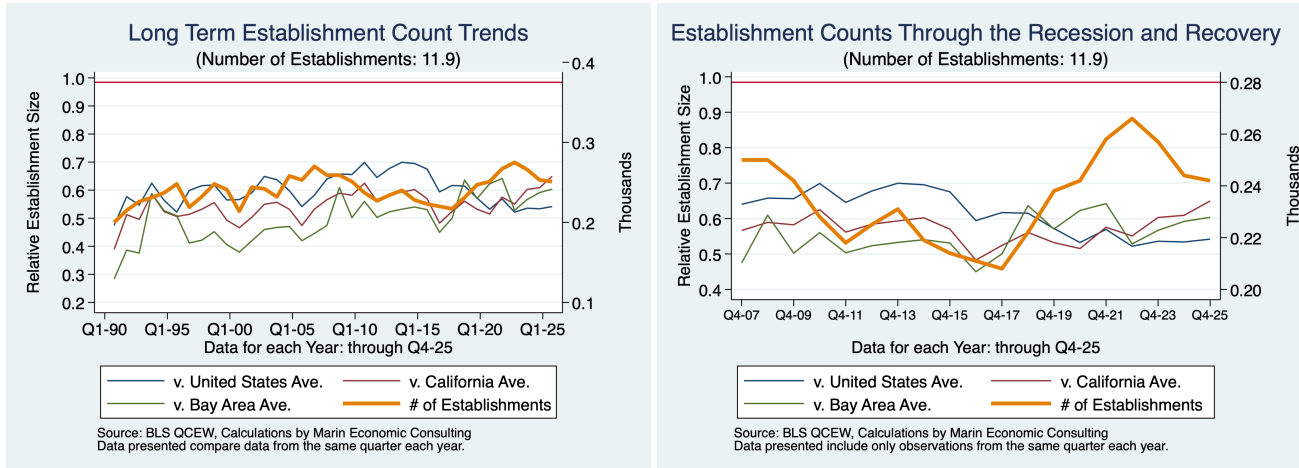
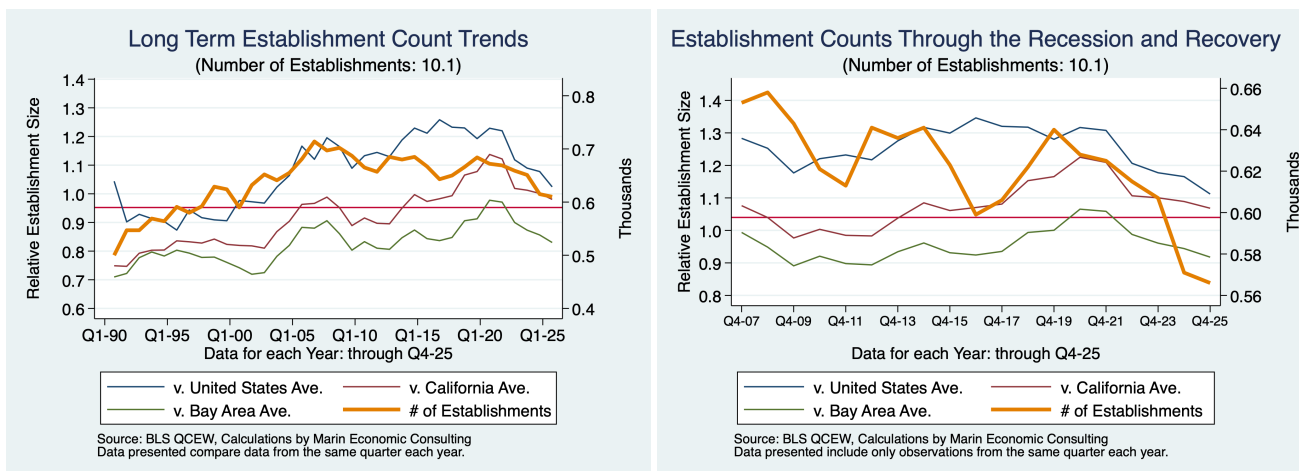


Figure 4 - 10: 42: Wholesale Trade



5. Descriptions and References

The contents of this report illustrate the evolution of Sonoma County establishment size patterns over time. There are several types of data presented. They include:

Establishment Counts: Number of establishments that employ non-farm payroll employees in each industry.

Average Size: The average number of non-farm payroll employees in each establishment by industry.

Relative Establishment Size: Relative establishment size is indicated by the ratio of the establishment size locally (by industry) to the average size in some broader geography. When indicating relative size versus California, it is the region's relative size divided by the relative size of establishments in California. Therefore, values greater than one indicate larger establishments locally in the industry in question and values less than one indicate smaller establishments on average. Relative establishment sizes are presented versus the Bay Area, California, and the United States, separately.

LQ: LQ is used as a shorthand in the graphs for Relative Establishment Size. This is used because it is comparable in concept to Location Quotient, which is the ratio of employment shares. The values presented in the graphs are ratios of establishment sizes.

The data underlying this report are from the Bureau of Labor Statistics: Quarterly Census of Employment and Wages (QCEW). These data are available on a quarterly basis, generally with a 5 month lag from the end of the quarter to the release of the data.

QCEW: The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. <http://www.bls.gov/cew/home.htm>

Time Period: The data extend from Q1-1990 through Q4-2025

Seasonality: There is a significant seasonal component to many industries. The QCEW data are not seasonally adjusted. Rather than seasonally adjusting the data, most comparisons in this report are between the same quarter in different years. The data presented are therefore the actual employment levels compared across years.

A particular focus of this report is on the post-Pandemic recovery. This is accomplished by comparing the most recent quarter of data to the same quarter in 2007, the last non-recessionary year for most of California and the United States.