



# SONOMA COUNTY ANNUAL TOURISM REPORT

INDUSTRY REPORT

2021



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# EXECUTIVE SUMMARY

August 2021

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism, is pleased to bring you the 2021 Annual Tourism Report. The report contains three sections integrating findings on the local tourism industry.

## MOODY'S ANALYTICS INDUSTRY ANALYSIS

Moody's is a leader in economic research and provides key quantitative and qualitative analysis on Sonoma County's tourism industry. Key findings include:

- The long-term outlook for Sonoma County Tourism is positive with steady growth that will rebuild its tourism base. This recovery will be propelled by the county's food and beverage services, natural beauty, and proximity to strong regional economies.
- Aggregate income has risen since the onset of the pandemic, partially resulting from stimulus packages, and consumers are holding massive savings. Retailers will feel relief if consumers choose to start spending those savings. A spending boom will surely benefit Sonoma County's tourism industry.
- While it was predicted that the U.S. would reach herd resiliency by the summer, public mistrust in vaccinations and the advance of new COVID-19 variants proved to be challenging. Lockdowns could be reinstated, delaying recovery.

Note: The forthcoming details in this report reflect trends sourced from data gathered during the novel Coronavirus pandemic. The Moody's Analytics analysis includes data as recent as April 2021. Since April, the spread of the highly contagious Delta variant has altered expectations and forecasts.

## TOURISM INDUSTRY INDICATORS

Sonoma County Tourism, in partnership with Visit California and Dean Runyan Associates provided the latest available economic impact figures on Sonoma County and is the primary source for Tourism industry Indicators. Key findings include:

- Direct visitor spending in Sonoma County in 2020 totaled \$1.1 billion, down from \$2 billion in 2019. Despite the steep decline in spending, Sonoma County remained just behind Monterey (\$1.5 billion) and ahead of Napa (\$0.8 billion) and El Dorado (\$0.7 billion) Counties.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$35.9 million in 2020. This is a decrease of 26.3% from 2019, a year that recorded the highest level of TOT receipts Sonoma County has ever collected.

## SONOMA COUNTY VISITOR PROFILE

In 2021 Sonoma County Tourism partnered with Longwoods International to gain insights into its visitor base. Tapping into Longwood's proprietary Travel USA survey of approximately 330,000 domestic travelers and asking questions specific to Sonoma County travel, key findings were derived:

- In 2020, Sonoma County welcomed 8.4 million visitors: 3.6 million overnight and 4.8 million day visitors. The average stay was 2.2 nights and the average per-person expenditure for overnight visitors was \$165.
- The main reasons for travel to Sonoma County were visiting friends and relatives, touring trips, and outdoor exploration. The top activities and experiences enjoyed by guests are shopping, visiting wineries/breweries/distilleries, attending celebrations, business conventions/conferences, and sightseeing.

For additional information, questions, comments, or suggestions please contact us at (707) 565-7170 or visit [www.sonomaedb.org](http://www.sonomaedb.org).



# MOODY'S ANALYTICS TOURISM ANALYSIS

Note: The forthcoming details in this report reflect trends sourced from data gathered during the novel Coronavirus pandemic. The Moody's Analytics analysis includes data as recent as April 2021. Since April, the spread of the highly contagious Delta variant has altered expectations and forecasts.

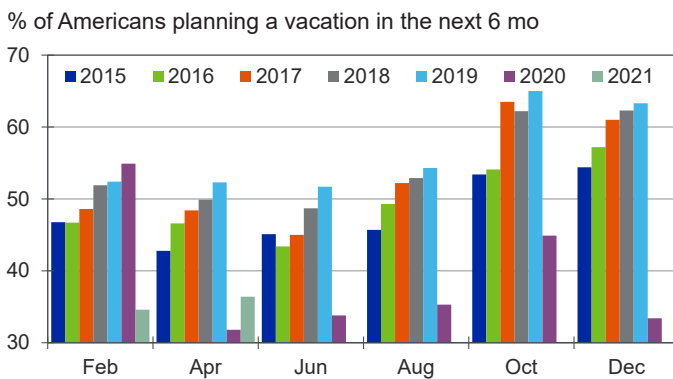
## Recent Performance

- According to data compiled by Dean Runyan Associates, Sonoma County's visitor spending was cut nearly in half compared with a year prior as contagion fears and government policies restrained vacation plans. Hospitality operators grappled with below-average hotel occupancy rates for much of the year, and hotel revenues are now just picking up as of April.
- Leisure/hospitality employment was cut in half at the onset of the pandemic and is only starting to recover. While payrolls have improved in each of the last three months and sit at their highest level in nearly a year, they remain 30% below their pre-pandemic levels.
- The vaccination rollout, falling case counts, and removal of COVID-19-related business restrictions paved the way for some improvement in lodging data in recent months. Hotel revenues in Sonoma County through April are 20% higher than last year's, and consumers feel more confident and more willing to vacation.

## Macro Drivers

- The economy is off and running. Growth will continue to recover, barring any setbacks in pandemic recovery. The winding down of the COVID-19 pandemic will power this growth, with vaccination rates reaching 80% by mid-August, massive fiscal support totaling \$2 trillion this year, and the unleashing of pent-up demand by higher-income households that socked away cash while sheltering in place. If everything sticks roughly to script, the economy will fully recover from the pandemic, with a sub-4% unemployment rate by mid-2022. It will have taken two years for the economy to return to full employment. For context, it took nearly a decade for the economy to find its way back after the financial crisis, and approximately five years after the 1990 and 2000 recessions.
- The two components we consider to be the closest proxies to measure changes in people's openness for in-person activities—passenger throughput at airports and seated diner volume at restaurants—increased solidly during the past month. Transportation Security Administration traveler volumes are improving and will likely accelerate rapidly in the summer. Data from OpenTable, which charts seated diners at restaurants, show a similar rapid improvement, growing from 60% below 2019 levels at the end of January to just under 20% by the beginning of April. Consumers are growing more comfortable with traveling and dining, and this will improve

## More Americans Planning to Travel



Sources: The Conference Board, Moody's Analytics

**Chart:** The share of Americans who are planning a vacation in the next six months fell sharply to an all-time low in the spring months of 2020 and is only now beginning its ascent. As of April 2021, 37% of Americans were planning a vacation in the next 6 months. Reduced contagion fears will persuade more travelers to vacation through the end of this year, pending higher vaccination rates. The rise of the Delta variant, however, could cause the growth in travel rates to slow down.



# MOODY'S ANALYTICS TOURISM ANALYSIS

further as vaccination rates increase.

- Progress on the vaccination front, fiscal stimulus, and loosening of state COVID-19 restrictions are benefiting U.S. service industries. The outlook is for strong growth in consumer service spending as excess savings are reduced and pent-up demand is released. There is more than \$2 trillion in excess savings, which should provide significant support to consumer spending on services late this year and next. Rising stock prices will provide an additional tailwind to spending via the wealth effect. The Standard & Poor's 500 is already 30% above its pre-pandemic peak, and higher-income households have especially benefited from the robust stock market recovery.
- Excess saving will gradually shift to below-trend saving over the next few years. Changes in the composition of spending, chiefly away from goods and toward services as the economy reopens, will slowly and incompletely reverse.
- The loosening of business restrictions and easing contagion fears will play a large role in determining the fortunes of Sonoma County vintners and spirit makers. While they adapted well to the changing landscape, a rebound in visitor spending at wineries and restaurants will help ease the pain after months of shuttered nonessential businesses.

## Industry Drivers

- Sonoma County's allure as a global destination for high-end wines, craft beer, outdoor recreation, and cutting-edge cuisine will pave the road to recovery from the COVID-19-induced recession. Tourism-centric metro areas fared the worst during the pandemic but will also see a boost as pent-up demand for travel is unleashed this summer.
- The outlook for Sonoma County's tourism will undoubtedly depend on the continued abatement of COVID-19 cases nationally and consumers' willingness to travel. According to the Conference Board, the share of Americans planning a vacation in the next

sixth months rose to 37% in April, marking steady improvement over the last six months, though it is still far below historical levels. However, with states pushing forward with reopening plans and the vaccination rollout gaining steam, we expect this number to climb higher.

- Consumers' professed comfort in taking vacations has followed a similar trend. According to Morning Consult, the share of respondents who are willing to travel rose to 60% in the last week of May after hovering around 30% for much of January and February. Respondents are more comfortable traveling by car than through domestic air travel, and this will likely help Sonoma County recover more quickly than other tourism-centric areas given its proximity to large population hubs and more of a reliance on visitors from neighboring metro areas within driving distance.
- Through the end of August, more than 80% of California's eligible population has been at least partially vaccinated, putting the state in the top 20 nationally. Furthermore, the states that have made the most progress are clustered on the West Coast generally, which may give a further boost to West Coast tourism industries given that many Sonoma County visitors travel from nearby states.
- Although the outlook for tourism is quickly improving, it will take some time to repair the damage inflicted from the pandemic. Sustained improvement in visitor spending will drive employment gains through the year, but it will take years to recover all pandemic-related losses.

## Pricing

- According to Smith Travel Research, average daily rates at Sonoma County hotels jumped 58% in July 2021 compared with July 2020. These figures are well above typical July rates prior to the pandemic. Occupancy rates have almost recovered to their pre-pandemic averages, sitting at 77%. Assuming that Sonoma County can lower its rising COVID-19 case rates--largely caused by the

# MOODY'S ANALYTICS TOURISM ANALYSIS

highly contagious Delta variant--occupancy is expected to tick higher and pricing power should rival its pre-pandemic years.

- Higher visitor foot counts will likewise improve pricing power at tasting rooms, restaurants, breweries, and outdoor recreation firms. Data from OpenTable show that seated diners at California restaurants are rapidly approaching pre-pandemic levels, down on average just 14% in May compared with the same period in 2019. Sonoma County restaurants' pricing power will recover in tandem and could improve further if pent-up demand and excess savings are pushed toward more spending on services in the summer and latter half of the year.
- Despite rebuilding efforts and the opening of several new establishments, the number of hotel rooms in the county will rise only modestly over the next few years. The extension of occupancy taxes to vacation rental websites such as Airbnb will narrow their price advantage over traditional hotels and will mean most overnight visitors will face higher prices.

## Operating Expenses

- Labor shortages, which are hampering businesses' ability to get back in full swing, are pushing up wages and prices. It seems incongruous that there are a record number of open jobs at that same time unemployment remains so high and labor force participation

so low. This is unprecedented. Early in past economic recoveries, high unemployment and low labor force participation meant businesses had no trouble finding workers at depressed wages.

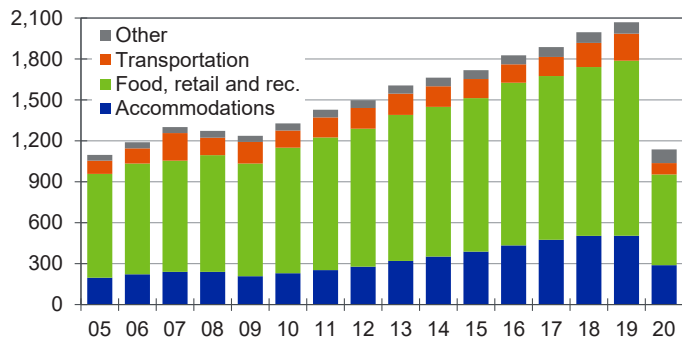
- This can be reconciled by the economy's rapid reopening and surge in demand for workers in the hotel, restaurant, healthcare, educational services, recreational activities and personal services industries. Many of the currently unemployed who say they have permanently lost their jobs likely worked in those industries prior to the pandemic but at employers that failed. They will get back to work, but it will take time. They need to find a new employer that may well require changes in their hours, childcare needs, commutes, and even where they live. The supplemental unemployment insurance available to many of the unemployed is also allowing these job seekers to search for longer before taking a job.

## Profitability

- Profit margins have nowhere to go but up after an extremely difficult year for Sonoma County hospitality operators. Rising revenue at local hotels will help offset quickly advancing operating expenses. Unfortunately, given the slow start to this year, profitability will lag its pre-pandemic levels. Year-to-date revenues through April 2019 were approximately 20% higher than in the same period this year.
- Wineries and breweries will likewise see margins improve as tasting room visitation

## Visitor Spending Decreased Sharply in 2020

Tourism spending, \$ mil



Sources: Visit California, Dean Runyan Associates, Moody's Analytics

**Chart:** As expected, visitor spending in Sonoma County cratered in 2020 as a result of the COVID-19 pandemic and subsequent economic recession. Would-be travelers cancelled vacation plans amid stay-at-home orders and significant contagion fears, sapping demand at local hotels. The lack of foot traffic from outside visitors, coupled with nonessential business closures, led to a precipitous drop in retail sales. All told, visitor spending pulled back by nearly 50% compared with 2019.





# MOODY'S ANALYTICS TOURISM ANALYSIS

ticks higher through the end of the year. Small wineries rely heavily on foot traffic to sell higher-end bottles and generate new consumers. Outdoor recreation and adventure firms will likely fare even better, as outdoor activities are less exposed to contagion risk. Google community mobility data shows that activity at parks has improved, signaling that residents are willing to congregate in outdoor spaces.

## Long-term Outlook

- Longer term, Sonoma County will steadily rebuild its tourism base given the county's natural beauty, proximity to strong regional economies, and diverse tourist attractions. Visitors will flock to the area's superior wineries and scenic trails, while budding breweries and wellness establishments will enhance the visitor experience.
- Food and beverage services will be a particular draw for younger generations. Millennials prefer higher-quality wines, craft beers, and local organic food, and they can experience all three in Sonoma County. The recent legalization of marijuana may provide an additional avenue to attract more tourists. Generation Z, the cohort born after 1995, displays similar spending patterns and places an even higher premium on experiences rather than consumer products. As this cohort reaches drinking age, they will complement millennials as an important source of demand for local goods and services.

## Upside Risks

- Consumers have saved massively more than normal since the pandemic began, as spending fell while income rose in aggregate thanks to government largesse. This saving increased early this year with stimulus. The assumption is that these monies stay in consumers' hands as a reserve against further economic upheaval and, for baby boomers, at least, retirement security. Should consumers decide to spend the money, as they may feel so pent up that they cannot take it anymore,

it could be happier times for retailers. If so, an even larger than anticipated spending boom could occur, especially benefiting Sonoma County's tourism industry.

- Increased transportation links between Sonoma County and other travel destinations create additional upside risk for tourism. The building back of nonstop flights at Charles M. Schulz Airport boosted air arrivals by close to a fifth last year. While air travel is not expected to return to pre-COVID-19 levels any time soon, additional transportation links position Sonoma County to capitalize on more out-of-state travelers.

## Downside Risks

- The distribution of the vaccine remains another source of risk. There is the risk that public mistrust of the vaccine could slow its adoption and usefulness, delaying or even preventing the U.S. from reaching higher vaccination rates. A more devastating risk would be new variants of the virus, including the Delta variant, becoming partially or fully resistant to current vaccines. Under such a scenario, odds of widespread lockdowns would increase, stressing the global recovery.
- High asset prices are a major risk. As prospects improve and interest rates rise, a correction in equity and other asset prices is increasingly likely. That would be a threat to spending growth dependent on well-to-do households bolstered by the wealth effect of rising stock prices.

# TOURISM INDUSTRY INDICATORS

The Tourism Industry Indicators section is based on data prepared for Sonoma County Tourism by Dean Runyan and Associates, as well as industry data from Smith Travel Research, Longwoods International, and Sonoma County's Transient Occupancy Tax receipts. Where necessary, the data and graphs in this section have been adjusted for inflation using the U.S. Bureau of Labor Statistics Consumer Price Index.

Monterey, Napa, and El Dorado are used as comparison counties because of their similarities in offerings as tourism destinations. The featured data is the latest available from Visit California.

## KEY FINDINGS

- In 2020, Sonoma County welcomed 8.4 million overnight and day visitors.
- Direct visitor spending in Sonoma County in 2020 totaled \$1.1 billion, a 49.5% decrease from 2019.
- The 2020 Sonoma County Occupancy Rate was 53%, Average Daily Rate was \$140, and RevPAR was \$73.52. The YOY% change from 2019 for Occupancy Rate decreased 29.2%, ADR decreased 23.0% and RevPAR decreased by 45.5%.
- 16,260 jobs were generated by travel spending in 2020, placing Sonoma County second among comparable counties. Monterey county had 20,370 jobs generated and ranked first.
- The Charles M. Schulz - Sonoma County Airport (STS) served 195,303 passengers in 2020 resulting in a 60% decrease in total passengers from 2019.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$35.9 million in 2020. This is an 11.2% decrease from 2019, which recorded the highest level of TOT receipts that Sonoma County has ever collected at \$48.8 million.

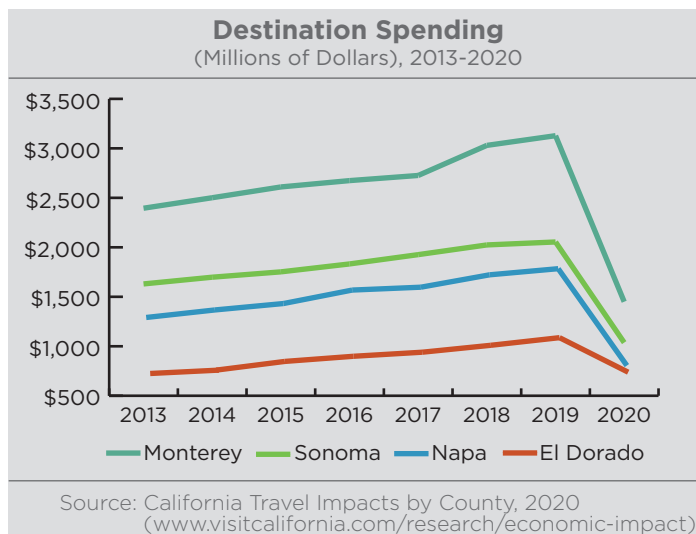


# TOURISM INDUSTRY INDICATORS

## DESTINATION SPENDING

### Destination Spending by Year

Destination spending is the total amount spent by visitors in Sonoma County. This indicator includes all spending on accommodations, wine activities, retail, and other tourism-related purchases. The most recent figures show that Sonoma County’s destination spending decreased by 49.5% from \$2.1 billion in 2019 to \$1.1 billion in 2020.



# TOURISM INDUSTRY INDICATORS

## DESTINATION SPENDING BREAKDOWN

### Total Industry Earnings Generated by Travel Spending

The most recent figures show that Sonoma County’s Industry Earnings Generated by Travel Spending decreased by 24.4% from \$863 million in 2019 to \$652 million in 2020.

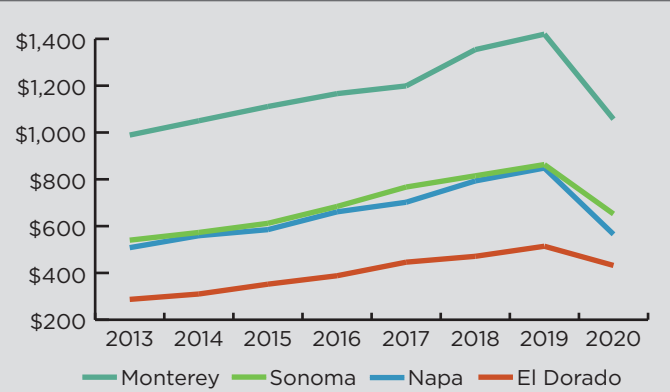
### Distribution of Visitor Spending by Commodity

As in previous years, the overall distribution of commodity-based visitor spending in Sonoma County is comparable to the featured competitive counties. However, there are several areas where Sonoma County appears to be somewhat unique. Visitors to Sonoma County devote a smaller share of their spending towards accommodations than other destinations - 28% of all spending, compared to 31% in Monterey County, 30% in El Dorado County, and 33% in Napa. Sonoma County visitors spend the largest amount on food and beverage services (30%).

### Distribution of Visitor Spending by Accommodation

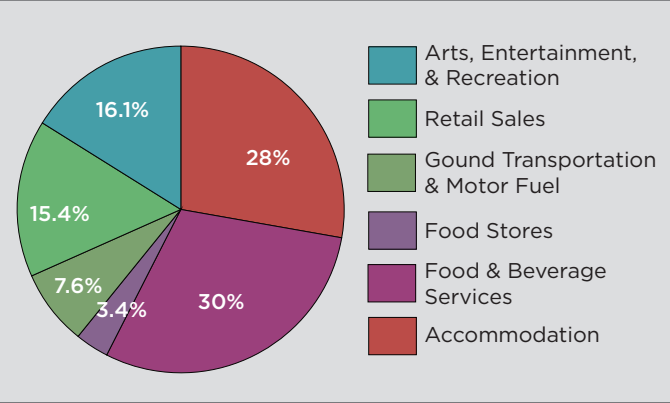
In comparison with other competitive counties, a smaller share of visitor spending in Sonoma County comes from visitors who are staying in a hotel or motel (62% compared to 67% in El Dorado County, 77% in Monterey County, and 82% for Napa County). Instead, a significant share of Sonoma County visitor spending is received from day travelers (13%) compared to 11% for Napa, 8% for Monterey, and 3% for El Dorado.

**Total Industry Earnings Generated by Travel Spending**  
(Millions of Dollars), 2013-2020



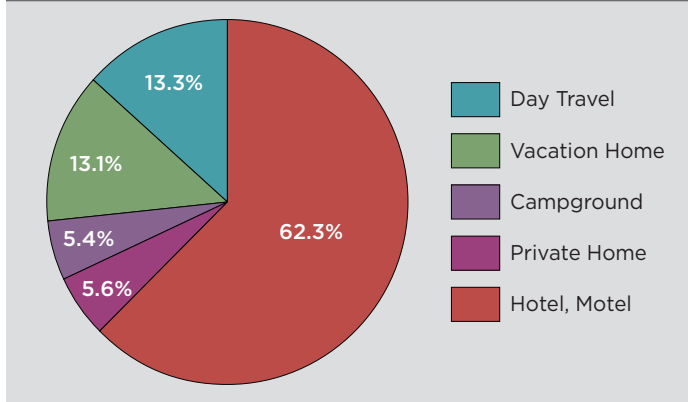
Source: California Travel Impacts by County, 2020  
(www.visitcalifornia.com/research/economic-impact)

**Distribution of Visitor Spending by Commodity**  
Sonoma County, 2020



Source: California Travel Impacts by County, 2020  
(www.visitcalifornia.com/research/economic-impact)

**Distribution of Visitor Spending by Accommodation**  
Sonoma County, 2020



Source: California Travel Impacts by County, 2020  
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# TOURISM INDUSTRY INDICATORS

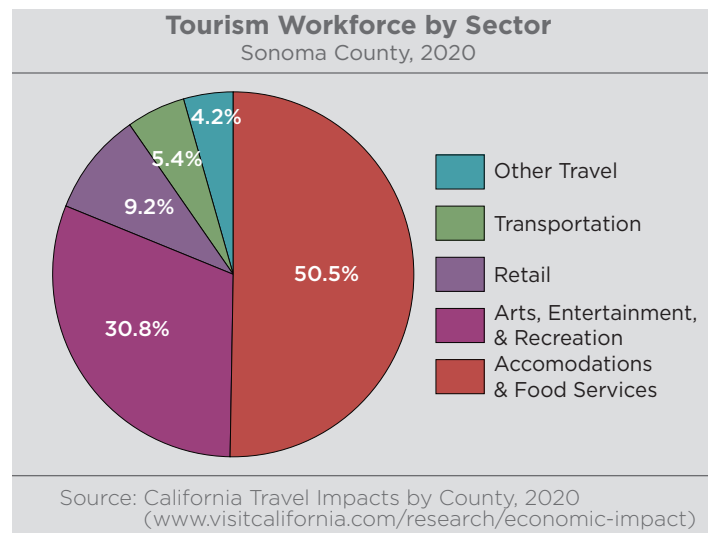
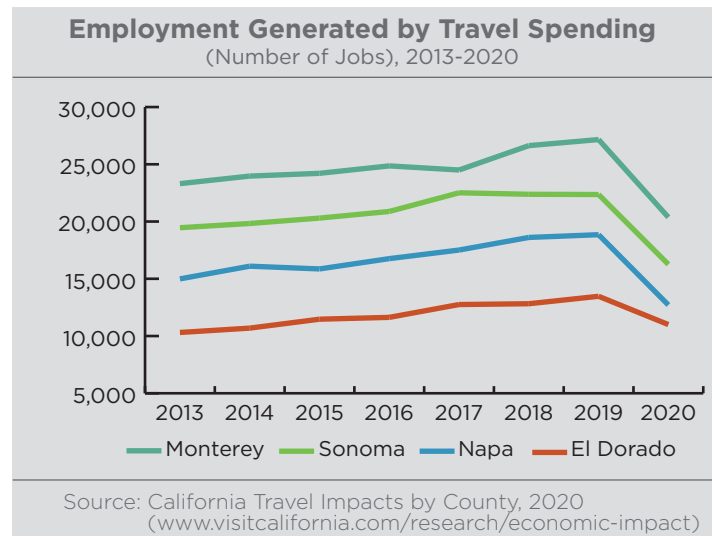
## INDUSTRY EMPLOYMENT

### Employment Generated by Travel Spending

With 16,260 jobs generated by tourist destination spending, Sonoma County ranks second against comparable counties - Monterey had 20,370 tourism jobs, Napa had 12,710 tourism jobs, and El Dorado had 11,000 tourism jobs in 2020.

### Sonoma County Tourism Employment by Sector

Distribution of employment within Sonoma County's tourism industry is similar to previous years, with 50.5% of employment in Accommodations & Food Services, 30.8% in Arts, Entertainment & Recreation, 9.2% in Retail. Ground Transportation and Air Travel (Other Travel) have also increased their share of employment at 4.4% and 4.2%, respectively.



# TOURISM INDUSTRY INDICATORS

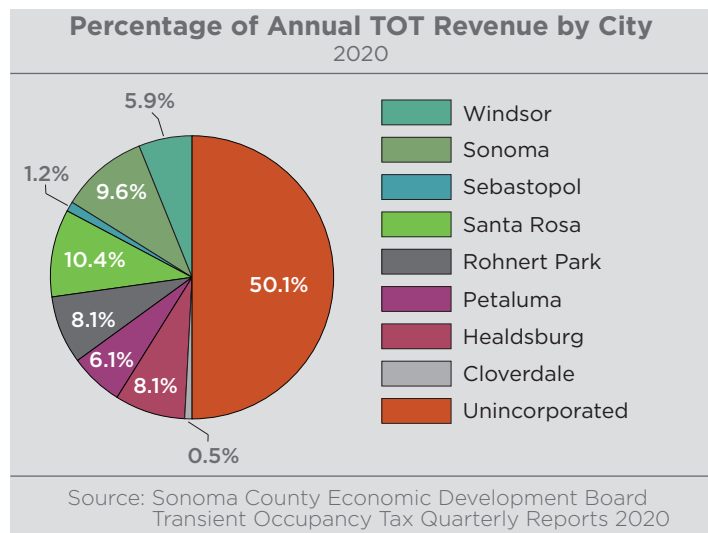
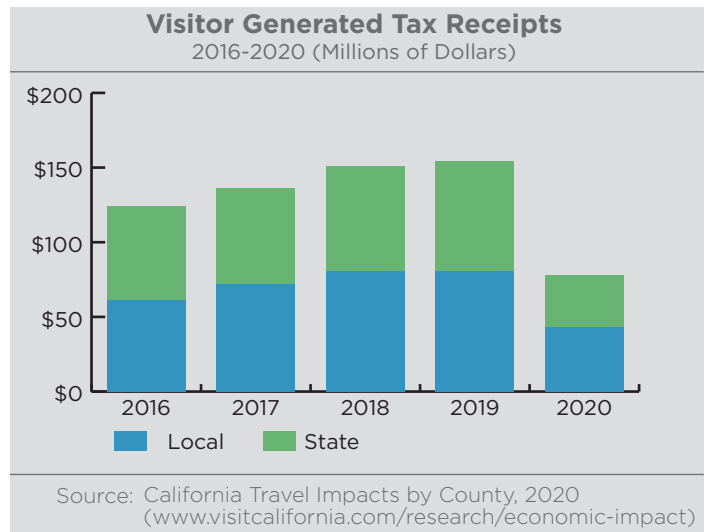
## TOURISM-GENERATED TAXES

### Visitor Generated by Tax Receipts

Spending by day travelers and overnight visitors to Sonoma County generate a significant amount of tax for state and local governments. Total local taxes collected from visitors to Sonoma County were estimated at \$43 million in 2020. Total state taxes collected from those same visitors was \$35 million in 2020. Total local and state tax collection decreased by \$76 million or 49.4% from 2019.

### Percentage of Annual TOT Revenue by City

Revenues from TOT are divided between the County of Sonoma (which receives revenue from lodging properties in unincorporated regions) and the individual cities in the county. Collectively, the incorporated cities generated 49.9% of all revenue in 2020, while the unincorporated areas of the county generated 50.1%.



# TOURISM INDUSTRY INDICATORS

## TRAVEL IMPACTS BY CITY

Sonoma County Tourism commissioned Dean Runyan and Associates to create a special report showing revenue generated to each of the municipalities from the tourism industry. The findings:

	Spending (\$ Million)	Earnings (\$ Million)	Employment (Jobs)	Tax Receipts* (\$ Million)		
				Local	State	Total
<b>Cloverdale</b>	8.4	4.8	121	0.5	0.4	0.8
<b>Healdsburg</b>	65	37	929	3.6	2.8	6.4
<b>Petaluma</b>	106	61	1,521	5.9	4.6	10
<b>Rohnert Park</b>	105	60	1,495	5.8	4.5	10
<b>Santa Rosa</b>	244	140	3,486	13	11	24
<b>Sebastopol</b>	17	10	245	0.9	0.7	1.7
<b>Sonoma</b>	81	47	1,162	4.5	3.5	8.0
<b>Unincorporated Area</b>	461	264	6,595	25	20	45
<b>Windsor</b>	50	28	710	2.7	2.2	4.9
<b>COUNTY TOTALS</b>	1,137	652	16,264	63	49	112

\*Tax receipts include tax receipts generated by visitors to Sonoma County as well as businesses and employees within the county.

# TOURISM INDUSTRY INDICATORS

## LODGING & HOSPITALITY ASSESSMENT

### Occupancy Rate

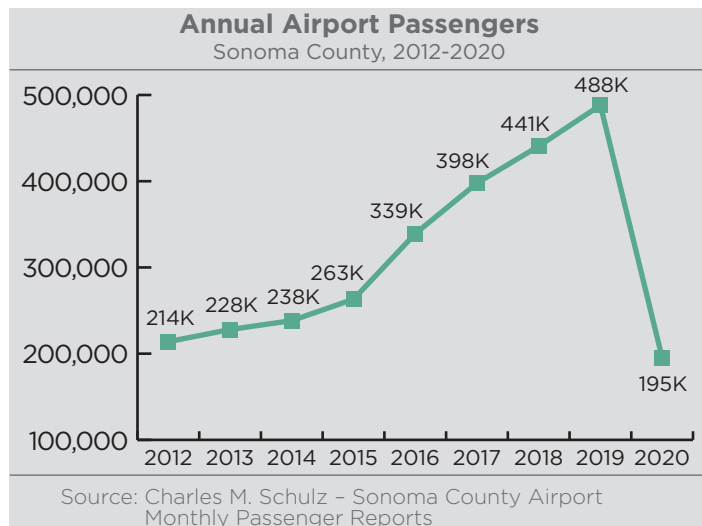
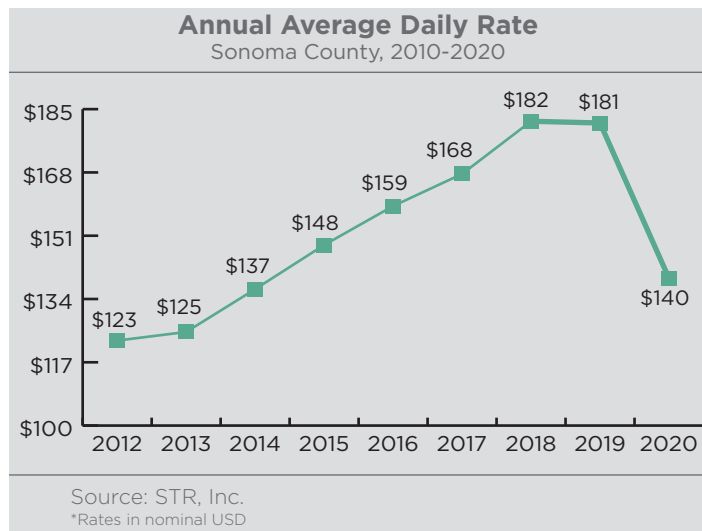
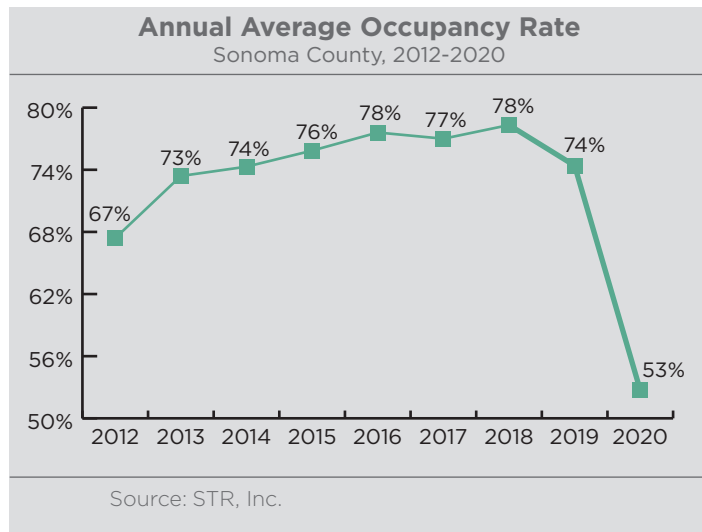
The occupancy rate for Sonoma County is determined by dividing the total room nights sold by the total room nights available for purchase. The average annual occupancy in 2020 was 53%.

### Annual Average Daily Rate (ADR)

Average daily rate (ADR) represents the average amount spent on accommodations by a visitor per room night in Sonoma County. 2020 is the first year that this number has decreased since 2010. For 2020, the average daily rate fell by 22.7% over the previous year to \$140.

## SANTA ROSA AIRPORT

Arrivals at Charles M. Schulz-Sonoma County Airport plummeted 60% after bringing in 488,000 passengers in 2019. Since 2012, passenger traffic at the Airport has increased each year, with the exception in 2020 due to COVID-19. During this slower period, Charles M. Schulz-Sonoma County Airport initiated construction of its Terminal Improvement and Modernization Project, which is expected to be completed by fall of 2022.





# TOURISM INDUSTRY INDICATORS

## TOURISM-GENERATED TAXES

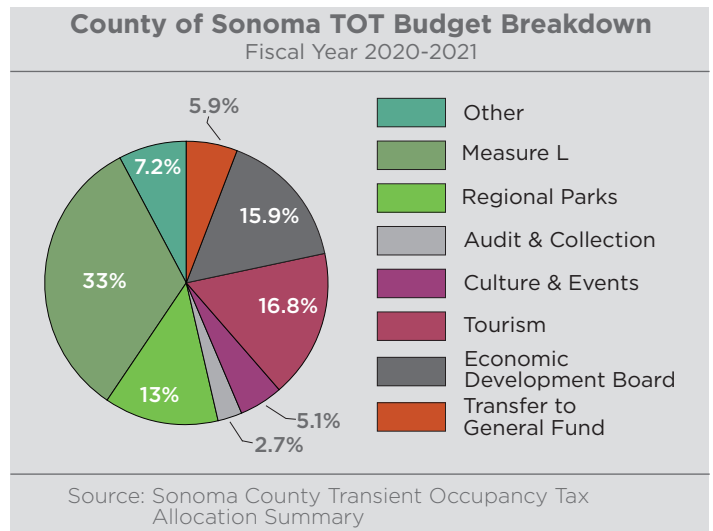
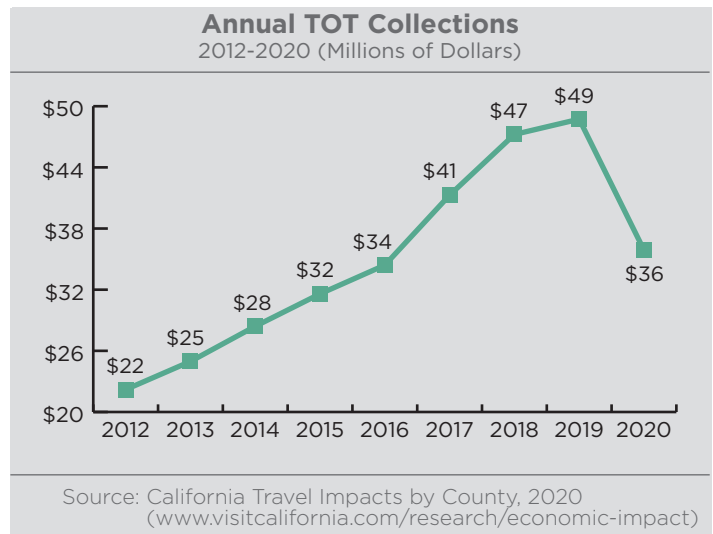
Transient Occupancy Tax (TOT) is a local tax on room rental revenue in lodging properties located in Sonoma County. The TOT rate varies between 9% and 14% from city to city.

### Annual TOT Collections

TOT revenues in Sonoma County decreased 26.3% from \$48.7 million in 2019--the highest ever collected in Sonoma County--to \$35.9 million in 2020.

### County of Sonoma TOT Revenue Spending

County of Sonoma TOT tax revenues are derived from a 12% tax on the rental of hotel and motel rooms, inn beds, and campgrounds in the unincorporated areas. TOT funds are distributed to three spending areas: General Fund Contribution (%), Community Investment Fund (%), and Measure L (%). Within the Community Investment Fund, the majority of TOT funds go to Economic Development (15.9%) and Tourism (16.8%). Measure L includes road repairs; fire and emergency services; affordable housing; event facilities improvements; tourism impact fund; code enforcement and compliance.



# TOURISM INDUSTRY INDICATORS

## TOURISM-GENERATED TAXES

Transient Occupancy Tax (TOT) is a local tax on room rental revenue in lodging properties located in Sonoma County. The TOT rate varies between 9% and 14% from city to city.

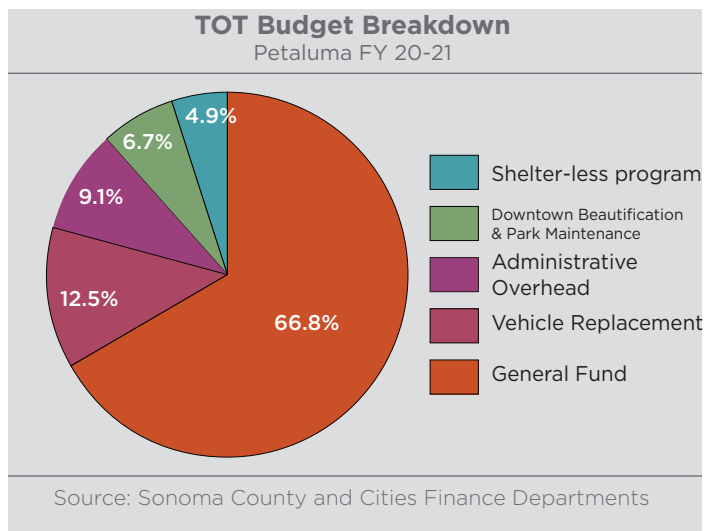
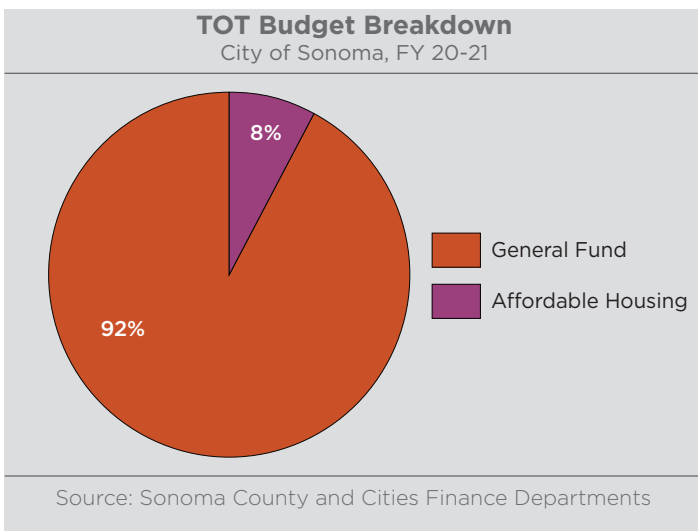
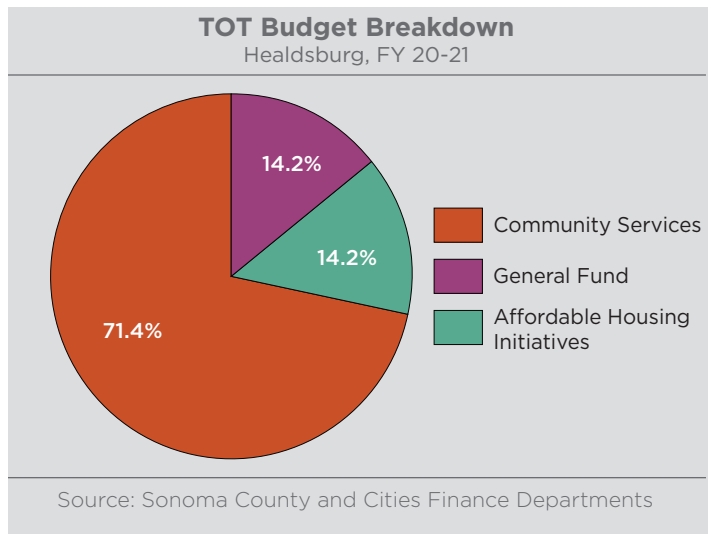
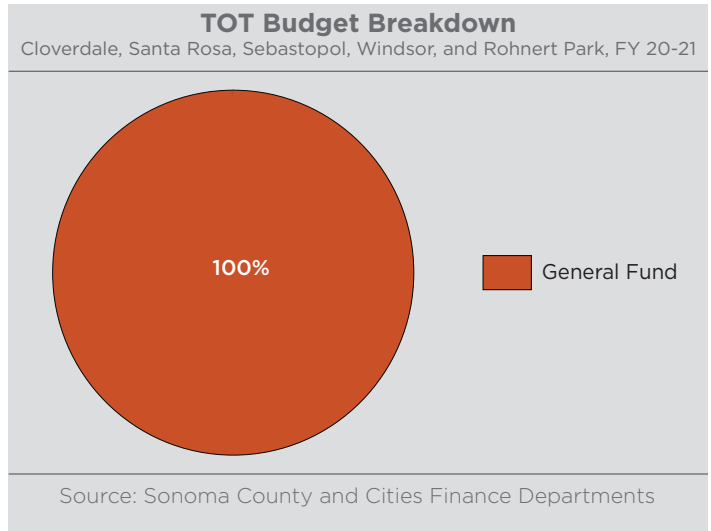
### City TOT Revenue Spending

TOT tax revenues are derived from taxes on the rental of hotel and motel rooms, inn beds, and campgrounds in Sonoma County cities.

The General Fund provides funding for a wide range of city needs, including:

- Fire
- Police
- Planning and Building
- Public Works
- Administration
- Community Services

TOT budget breakdowns are provided by each respective city’s finance department. Most cities allocate all TOT revenue to the general fund. Healdsburg and Petaluma also allocated revenue to additional categories, including Community Services, Collection and Administration, and Cultural and Arts Events.



# SONOMA COUNTY VISITOR PROFILE

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Sonoma County Tourism, in partnership with Longwoods International, has developed a visitor profile of overnight visitors to Sonoma County in 2020. This profile was developed by surveying 842 travelers who had visited Sonoma County within the past 12 months.

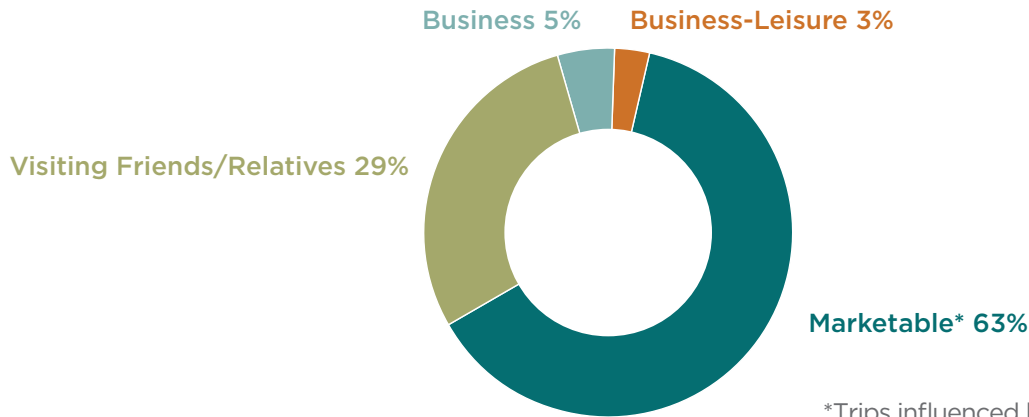
## KEY FINDINGS

- In 2020, Sonoma County welcomed 3.6 million overnight visitors. 2.7 million (76%) of these visitors were adults and 0.9 million (24%) were children.
- Total overnight visitor spending in Sonoma County in 2020 totaled \$589 million.
- Average per-person expenditures on domestic overnight trips was \$165 and per-party was \$468.
- The main purpose for visiting Sonoma County is visiting friends and relatives, touring trips, and outdoor explorations. The top activities and experiences enjoyed by guests are shopping, visiting wineries/breweries/distilleries, attending celebrations, business conventions/conferences, and sightseeing.
- The average overnight visitor stays in Sonoma County for 2.2 nights.



# SONOMA COUNTY VISITOR PROFILE

## Reason for Travel



Source: Longwoods International

\*Trips influenced by marketing efforts



## 3.2 People

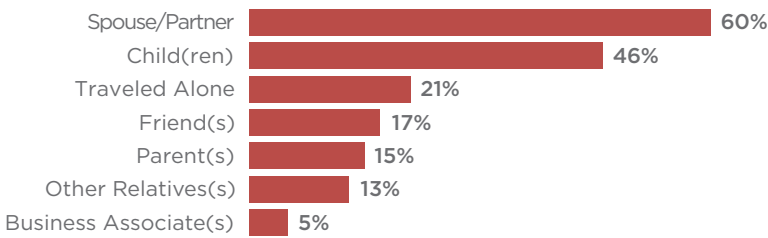
Size of the average travel party visiting Sonoma County



## 2.2 Nights

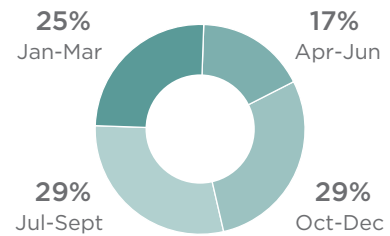
Average length of time spent in Sonoma County

## Composition of Immediate Travel Party



Source: Longwoods International

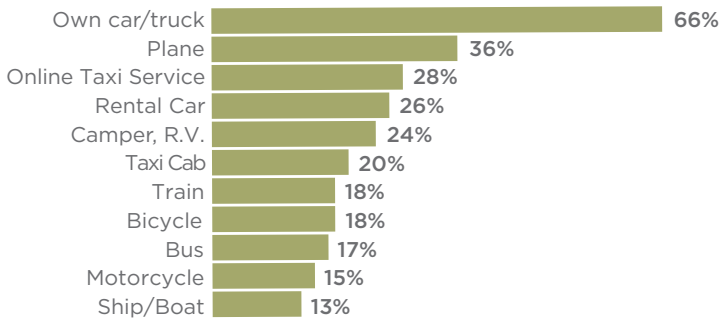
## Season of Trip



Source: Longwoods International



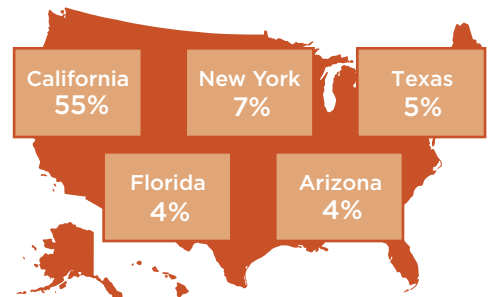
## Top Methods of Transportation Used to get to Destination



Source: Longwoods International



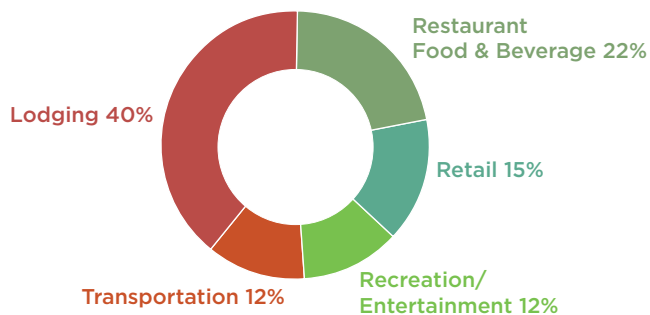
## Top Feeder States For overnight trips



Source: Longwoods International

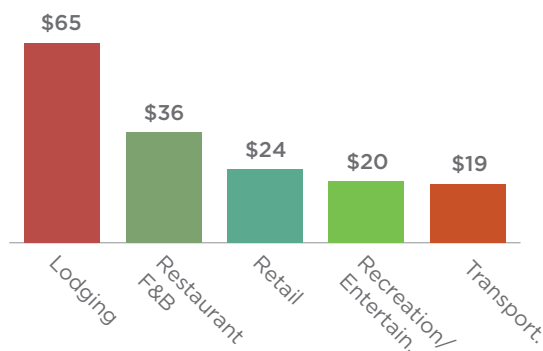
# SONOMA COUNTY VISITOR PROFILE

## Domestic Overnight Expenditures by Sector



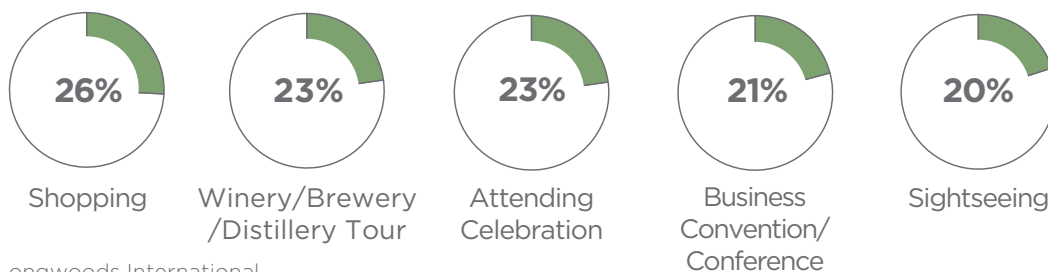
Source: Longwoods International

## Average Per Person Expenditures on Domestic Overnight Trips



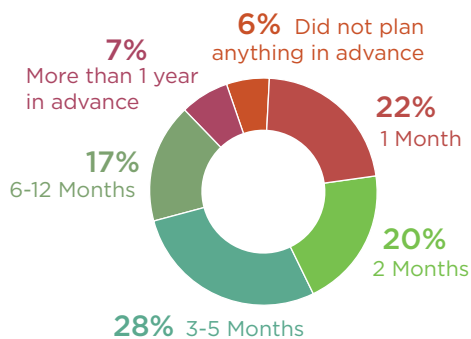
Source: Longwoods International

## Top Activities



Source: Longwoods International

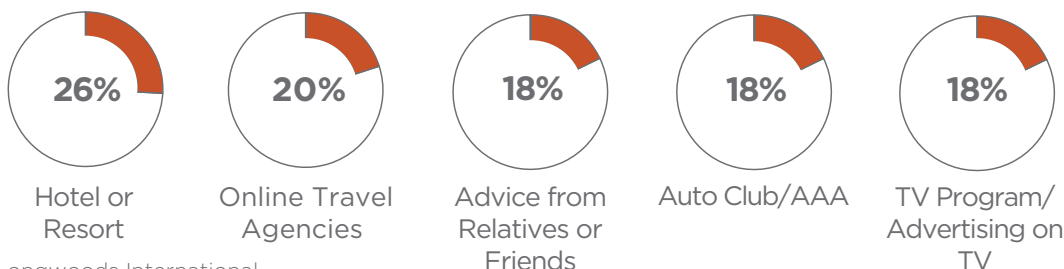
## Length of Trip Planning



**NOTE:**  
72% of overnight travelers planned their trips **2 Months** or more in advance

Source: Longwoods International

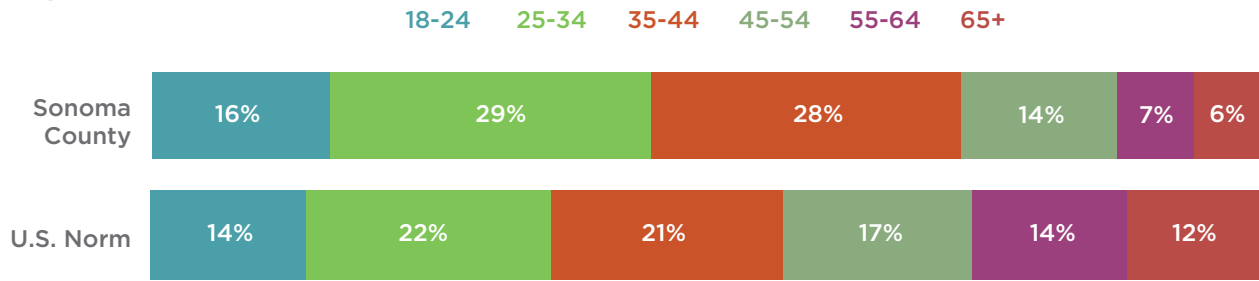
## Top Sources for Trip Planning Information



Source: Longwoods International

# SONOMA COUNTY VISITOR PROFILE

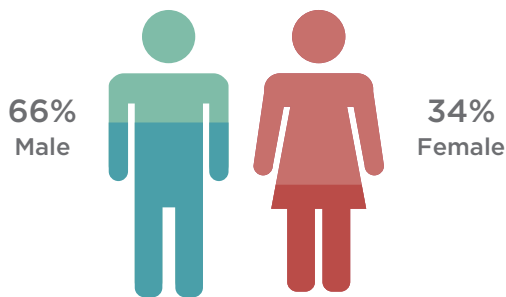
## Age



Source: Longwoods International



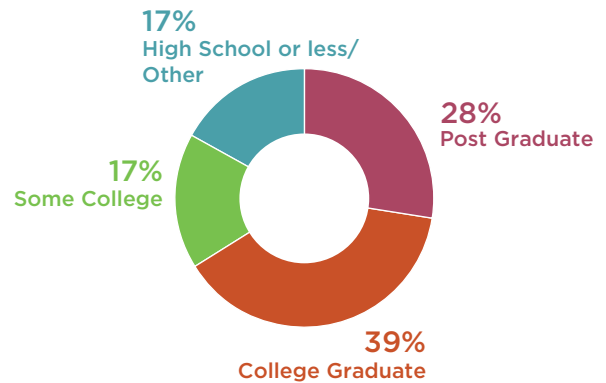
## Gender



Source: Longwoods International



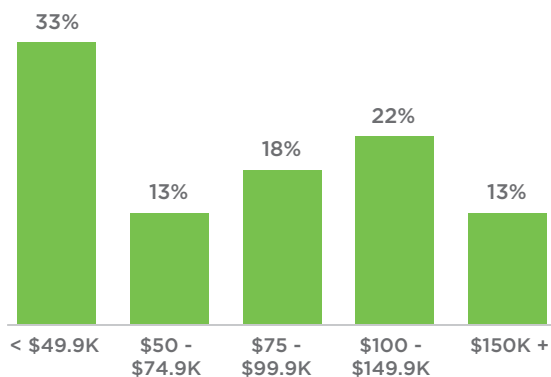
## Education



Source: Longwoods International



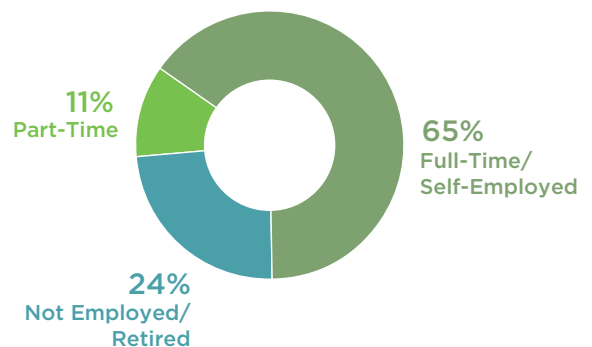
## Household Income for Domestic Overnight Trips



Source: Longwoods International



## Employment for Domestic Overnight Trips



Source: Longwoods International

# GLOSSARY

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**Average Daily Rate (ADR):** Total revenue brought in by hotel room rates (excludes taxes, resort fees, parking, etc.) divided by the total room nights sold.

**Occupancy Rate:** Total room nights sold divided by the total room nights available in Sonoma County (excludes vacation rentals, campgrounds, etc.) multiplied by 100.

**Revenue per Available Room (RevPAR):** Total revenue brought in by hotel room rates (excludes taxes, resort fees, parking, etc.) divided by the total room nights available in Sonoma County (excludes vacation rentals, campgrounds, etc.).

**Transient Occupancy Tax (TOT):** A tax of 9-12% of the rent charged to travelers when they rent accommodations in hotels/motels or through home sharing services like Airbnb unless the stay is for a period of 30 days or more. The TOT is commonly known as a “bed tax”.



# ACKNOWLEDGMENTS

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The 2021 Annual Tourism Report would not have been possible without the contributions of many individuals.

Special acknowledgment is due to Sonoma County Tourism for their invaluable suggestions and generous provision of statistical data on the tourism sector in Sonoma County.

**Quinne Woolley and Max Brownlee**, the EDB's Economic Research Coordinator and Workforce & Public Policy Coordinator, respectively, were responsible for compilation and organization of the report, data, and survey findings. They updated and consolidated the data sources and statistics from previous years to create this comprehensive analysis, and deserves special thanks.

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SONOMA**EDB**.ORG

707 - 565 - 7170

141 STONY CIRCLE, STE. 130, SANTA ROSA, CA 95401