



SONOMA COUNTY ANNUAL TOURISM REPORT

INDUSTRY REPORT

2020



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EXECUTIVE SUMMARY

October 2020

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism, is pleased to bring you the 2020 Annual Tourism Report. The report contains four sections integrating findings on the local tourism industry.

Note to the reader: The forthcoming information is derived from data sourced in both 2019 and 2020. Although traditionally the Annual Tourism Report discusses the year prior (i.e. 2019), it is important to discuss the affects of the 2020 COVID-19 pandemic on the tourism industry. Thus, we have made the decision to incorporate economic analysis from 2020 within the report. Declines in fourth quarter principal economic variables, related to tourism, may be skewed from the catastrophic Kincade Fire. This assumption is based off of the special Moody's report on the Kincade Fire. Where it is observed, by occupancy rates, that visitors have shifted the time frame of their trips to July and August from September and October; to avoid fire season. Furthermore, the figures and data that are sourced exclusively from the 2019 time frame do not reflect the affects of the COVID-19 pandemic, but do display industry trends prior to its wake.

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 remains uncertain due to the unpredictable nature of COVID-19. It is unclear the duration in which Sonoma's core tourism industry will be suppressed. The Sonoma County Tourism industry has taken a steep hit in 2020 with outdoor recreation businesses faring slightly better. Transient occupancy rates are slowly ticking up to 40%, but occupancy rates are still 40% below their year-ago levels.
- As state governments begin to reopen, employment and revenue will increase. However, another forced business closure could easily derail the recovery process. Until a vaccine becomes widely accessible the threat of a second outbreak remains present. There remains hope that the virus may subside more quickly than forecasted, which would significantly aid recovery.

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 2019 totaled \$2.05 billion, a 1.48% increase over 2018. Sonoma County saw the most air passengers pass through Charles M. Shulz airport in it's history at over 488,000.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$48.7 million in 2019; marking a tie with 2018 for highest TOT receipts collected.

SONOMA COUNTY VISITOR PROFILE

In 2020 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 2019, Sonoma County welcomed 10.2 million visitors: 4.9 million overnight and 5.3 million day visitors. The average stay was 2.3 days and the average per-person expenditure for overnight visitors was \$206.
- The main reasons for travel to Sonoma County were visiting friends and relatives, touring trips, and outdoor recreation. The top activities and experiences enjoyed by guests were visiting wineries, shopping, fine/upscale dining, visiting landmarks/historical sites and visiting beach/waterfront.



MOODY'S ANALYTICS TOURISM ANALYSIS

Recent Performance

- According to the Dean Runyan 2019 economic impact report, visitor spending rose 1.4%, a decrease over the 4.4% realized in 2018. This is likely due to two natural disasters during the year: the flooding that occurred during the Spring and the Kincadee Fire that occurred in the fall.
- Arrivals at Charles M. Schulz-Sonoma County Airport rose to a new record in 2019 due to expanded access to hubs in the West such as daily flights to Denver
- The COVID-19 pandemic dealt an immense blow to the tourism industry and the recovery process will take some time. Closure of non-essential businesses in March led to a drastic drop in occupancy rates. In mid-April, occupancy rates reached their nadir at under 25%. In recent weeks, there has been a slow uptick to 40% by the end of May, but occupancy rates are still at historic lows.
- Payrolls in the leisure/hospitality industry have been hit hard by the steep decline in tourism since the COVID-19 outbreak. Payrolls have plummeted to an all-time low with around 60% of the industry wiped out in the span of two months.

Macro Drivers

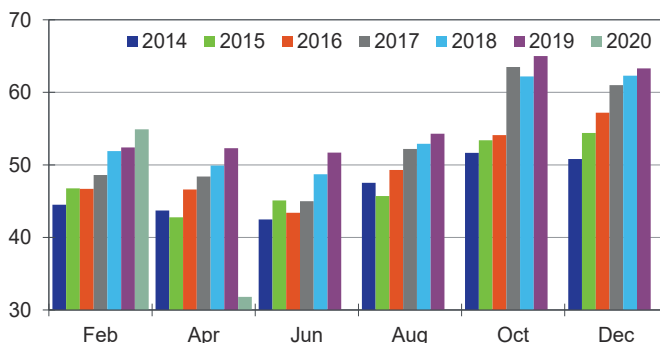
- As shelter in place orders begin to end across the U.S., businesses are beginning to reopen and local economies are restarting. In mid-April, around 2,600 counties were

halted, which accounts for around 30% of the nation's GDP. As of the first week of June, employment activity from the Google mobility data remained down 30% from pre-covid level compared to 50% down in mid-April. Activity at restaurants, retail stores, amusement parks, and other recreational activities was down 50%, and now it is only down 20%.

- Businesses will be dealing with lower sales and increased costs due to various social distancing measures they must comply with. Households will also keep their spending lower than usual because of uncertainty about the future.
- Unemployment is expected to decline over the next two to three months but settle at a high rate around 10%, notably the peak unemployment rate during the financial crisis. By the end of the year, Moody's predicts that half of lost jobs will be recovered. The economy will slump again later in the year if there is no additional stimulus package from the Federal government even without an increase in virus cases.
- A full recovery will not occur until a vaccine becomes widely accessible, which is not projected to occur until the latter half of 2021. Losses in income will lead to a lower demand for discretionary services and goods. State and local governments will also suffer losses as their tax base takes a hit. The U.S. will not

Americans Cancel Vacation Plans

% of Americans planning a vacation in the next 6 mo



Sources: The Conference Board, Moody's Analytics

Chart Insights:

- Consumer confidence has taken a sharp step back from last year's record high figures.
- Given the uncertainty about the future of the virus and lingering health concerns, the COVID-19 outbreak will likely weigh on travel plans through the summer and end of this year.

MOODY'S ANALYTICS TOURISM ANALYSIS

return to its pre-covid levels of employment until the end of 2023. Most companies will have to rethink their business models since covid restrictions are expected to be in place for some time.

Industry Drivers

- Sonoma County's reputation for high-end wines, craft beer, outdoor recreation and its renowned culinary scene, will temper much of the fallout from the virus. However, all tourist destinations will be hit hard throughout the remainder of the year.
- San Francisco is the second most affected economy among the 50 metro areas tracked by Homebase. Hours worked in San Francisco are down 60% from January. Most of the economic damage has been in the nation's largest concentrated global oriented cities. This decline in San Francisco's workforce will deal a significant blow to Sonoma as the Bay Area provides a significant amount of instate travelers
- The future of Sonoma's tourism depends on the state of the virus on a national level and consumer's willingness to travel. According to the Conference Board, the share of Americans planning a vacation in the next six months fell to 31% in April. With states reopening, there has been some improvement in domestic air travel.
- The Transportation Security Administration traveler throughput fell to its nadir of 87,000 per day in mid-April and have trended higher over the past two months. As of June, average daily volumes are hovering near 400,000, still down nearly 80% from a year ago. Volumes will likely not recover to pre-COVID-19 levels until at least 2021.
- According to Morning Consult, the share of respondents who are willing to travel rose to 32% in the first week of June from 18% in late April. Spending may be severely restrained as long as restrictions on economic activity remain in place. People may initially be eager

to get out and spend once they are able to, but after the initial rush, the reality of lost income may keep activity at lower numbers than prior to the crisis.

- This initial rush will affect unemployment patterns as well. Businesses will try to re-staff initially once restrictions loosen. In the event that revenues are unable to support all workers, businesses may have to lay-off some workers.

Pricing

- According to Smith Travel Research, average daily rates for hospitality occupancy dropped nearly 40% in March and have hovered around half of their year-ago levels in May. Hotels will need to cope with significantly discounted room rates through this year and early 2021.
- Low visitor foot counts will likewise take their toll on pricing power at tasting rooms, restaurants, breweries, and outdoor recreation firms. Restaurants are still operating at about half of their maximum capacity to ensure social distancing protocols. Outdoor recreational business activities have resumed, allowing for charter boat excursions, camping, and paddleboard and canoe rentals, among others.
- 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 costs will abate, as many small businesses enacted wage cuts and furloughed employees at the onset of shelter in place orders. The Paycheck Protection program's Flexibility Act allowed borrowers more time to spend their loan and extended the deadline to rehire employees and reverse wage and salary cuts.

MOODY'S ANALYTICS TOURISM ANALYSIS

- Operating expenses will see upward pressure as businesses reopen and are forced to comply with new health and safety precautions. Some businesses have had to post-pone reopening while they await the necessary renovations to ensure tables are sufficiently distanced.

Profitability

- Profit margins will be harmed this year as hospitality operators lower prices to persuade cautious travelers. Lower operating expenses owing to slimmed-down services will ease some of the sting, but the steep decline in revenues will far outweigh lower costs.
- Lower competition for workers as millions remain unemployed will lower wage pressures that had been building in recent years. According to data compiled from OpenTable, restaurant reservations are down 75% from a year ago.
- Wineries and breweries will likewise see margins squeezed as tasting room visitation remains depressed through the end of the year. Small wineries rely heavily and generate new consumers. Outdoor recreation and adventure firms will likely fare slightly better, as outdoor activities are less exposed to contagion risk. Activity at parks has improved to 15% above deviation compared with pre-COVID-19 baseline.

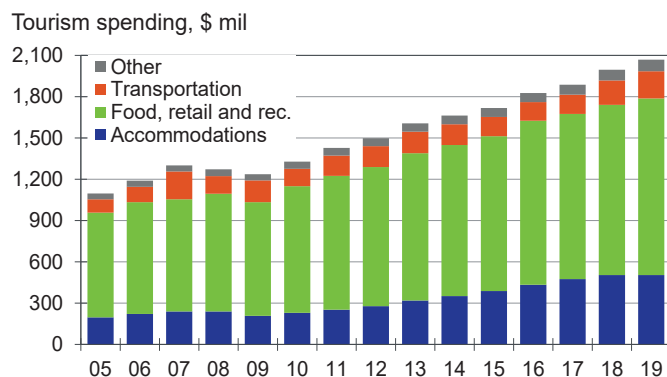
Long-term Outlook

- Longer term, Sonoma 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 high-quality wines, craft beers, and local organic food, and they can experience all three in Sonoma.

Upside Risks

- Consumers are showing restraint in returning full-fledged to restaurants and holding off on travel plans, but should infections trend lower more quickly than anticipated, there may be a quicker recovery in tourism travel than we currently expect.
- Increased transportation links between Sonoma County and other travel hubs create additional upside risk for tourism. Additional transportation links position Sonoma to capitalize on more out-of-state travelers.

Visitor Spending Climbs Higher in 2019



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

Chart Insights:

- Data on consumer spending shows that the pandemic has led to a historic pullback in spending and a significant jump in the savings rate. As long as consumers are worried about their job security and contracting the virus, they will keep at least one foot in the proverbial bunker.
- Businesses reopening will face many challenges. With lingering supply-side restrictions, still-soft demand, and a plethora of other issues such as supply chain disruptions, businesses will not ramp up operation and hiring to pre-COVID-19 levels any time soon.

MOODY'S ANALYTICS TOURISM ANALYSIS

Downside Risks

- While the world will likely be better prepared for another outbreak, the full or partial re-imposition of strict social distancing or forced business closure could easily derail the recovery. Trauma caused by the crisis also could result in a weaker than expected recovery.
- The monetary and fiscal responses have been critical, helping stabilize financial markets and providing essential assistance to individuals and small-business owners. Despite herculean fiscal and monetary support, more stimulus will be needed.
- If policymakers' actions are delayed or prove inadequate, the economic damage could end up being far more severe.



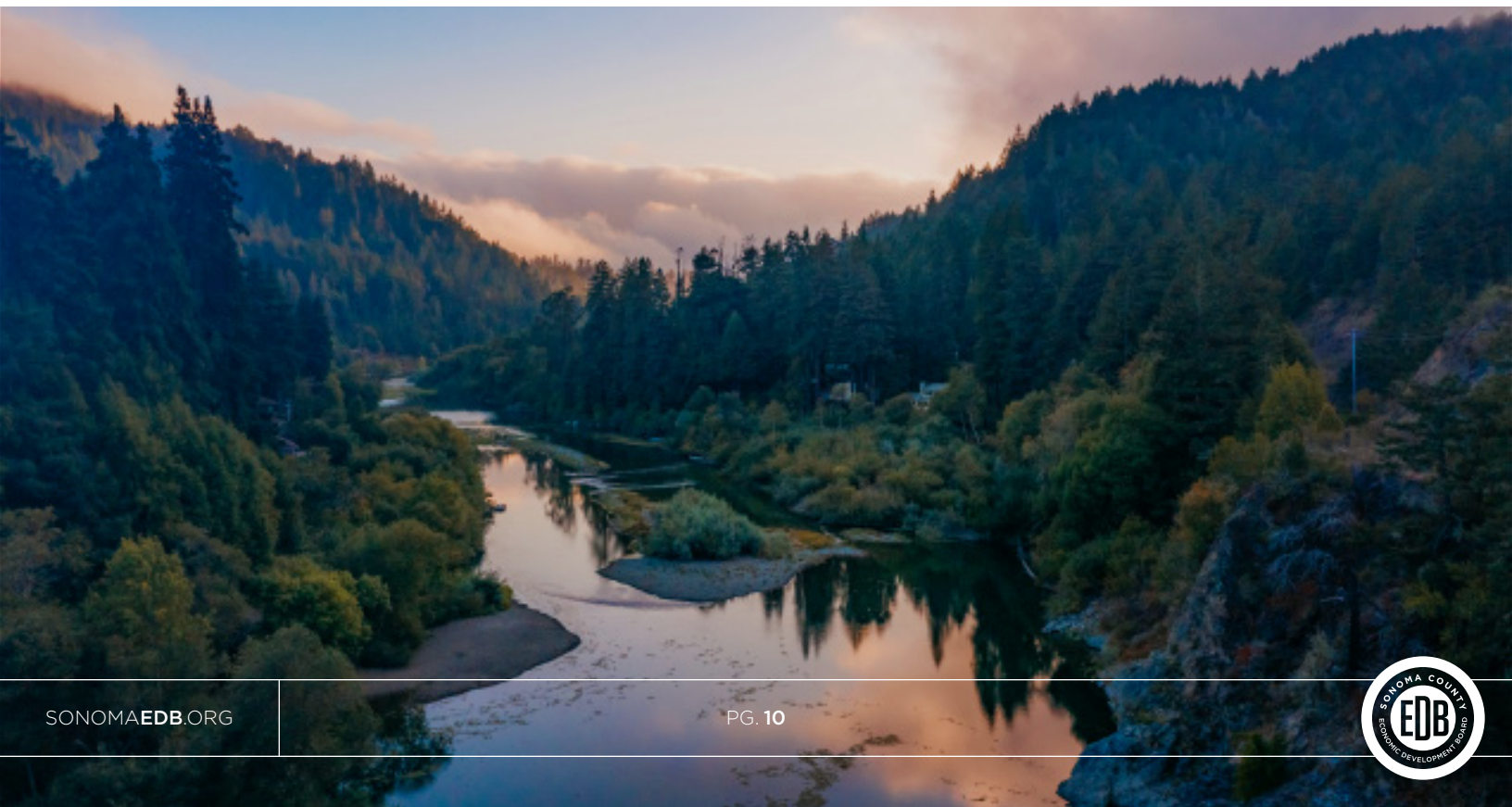
TOURISM INDUSTRY INDICATORS

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 2019, Sonoma County welcomed 10.2 million overnight and day visitors.
- Direct visitor spending in Sonoma County in 2019 totaled \$2.05 billion, a 1.48% increase over 2018.
- The 2019 Sonoma County Occupancy Rate was 70.89%, Average Daily Rate was \$180, and RevPAR was \$135.57. The YOY% change from 2018 for Occupancy Rate decreased 9.9%, ADR remained approximately the same and RevPAR decreased by 4.5%.
- Sonoma County continued to add tourism related jobs in 2019 and remained strong in total tourism jobs compared to similar regions.
- The Charles M. Schulz - Sonoma County Airport (STS) served 488,179 passengers in 2019 resulting in an increase of 9.7% in total passengers from 2018.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$48.7 million in 2019. This is a slight increase from the previous year and the highest level of TOT receipts that Sonoma County has ever collected.



TOURISM INDUSTRY INDICATORS

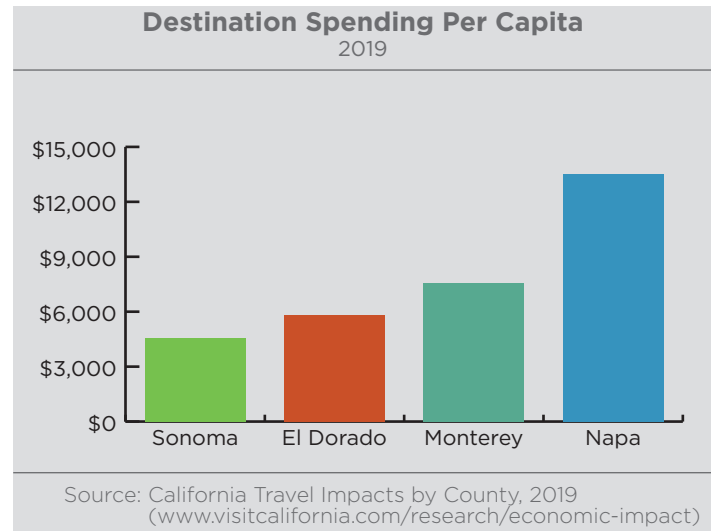
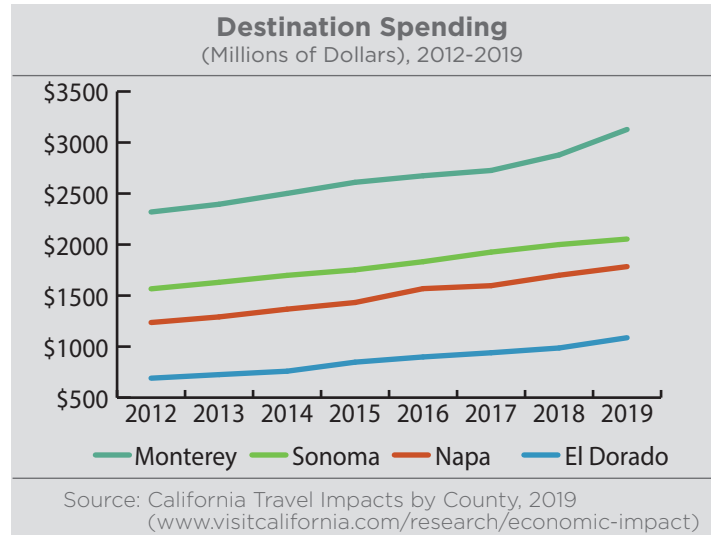
DESTINATION SPENDING

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 increased by 1.48% from \$2.02 billion in 2018 to \$2.05 billion in 2019.

Destination Spending per Capita

For each of Sonoma County’s 492,485 residents, \$4,542 in destination spending was generated. Napa County generated the highest per-capita spending at \$13,515 due to its relatively small population. Monterey followed at \$7,559 and El Dorado at \$5,814.



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 increased by 7.04% from \$807.8 million in 2018 to \$864.7 million in 2019.

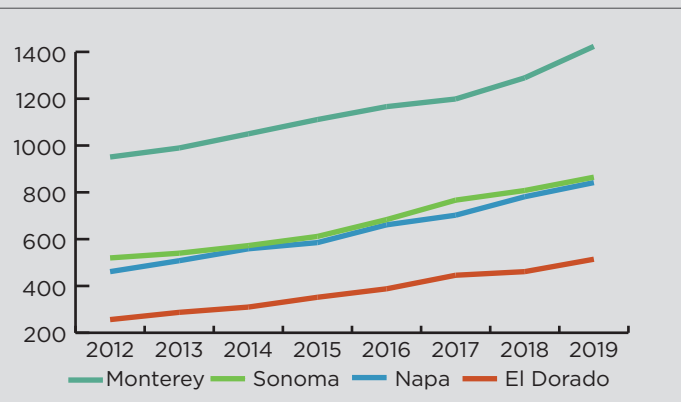
Distribution of Visitor Spending by Commodity

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 - 24.5% of all spending, compared to 28% in Monterey County, 27.5% in El Dorado County, and 32% in Napa. Sonoma County visitors spend the largest amount on food and beverage services (28%).

Distribution of Visitor Spending by Accommodation

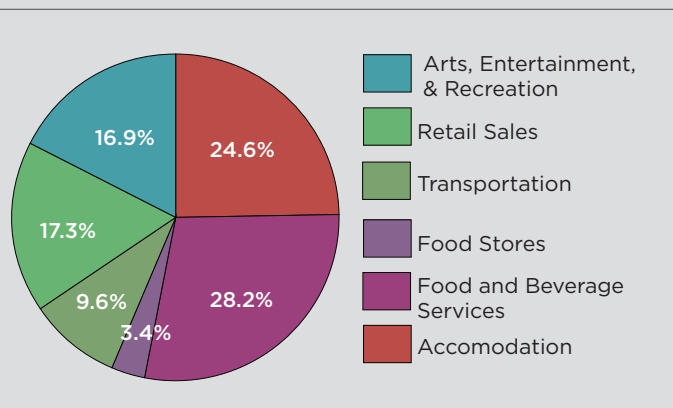
In comparison with other competitive counties, a smaller share of visitor spending in Sonoma County comes from visitors who are staying in a hotel or motel (54% compared to 67% in El Dorado County, 73% in Monterey County, and 75% for Napa County). Instead, a significant share of Sonoma County visitor spending is received from day travelers (28%) compared to 21% for Napa, 16.5% for Monterey, and 8.5% for El Dorado.

Total Industry Earnings Generated by Travel Spending
(Millions of Dollars), 2012-2019



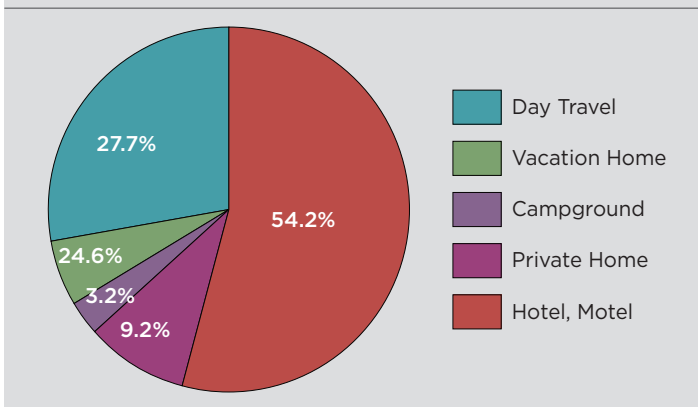
Source: California Travel Impacts by County, 2019
(www.visitcalifornia.com/research/economic-impact)

Distribution of Visitor Spending by Commodity
Sonoma County, 2019



Source: California Travel Impacts by County, 2019
(www.visitcalifornia.com/research/economic-impact)

Distribution of Visitor Spending by Accommodation
Sonoma County, 2019



Source: California Travel Impacts by County, 2019
(www.visitcalifornia.com/research/economic-impact)



TOURISM INDUSTRY INDICATORS

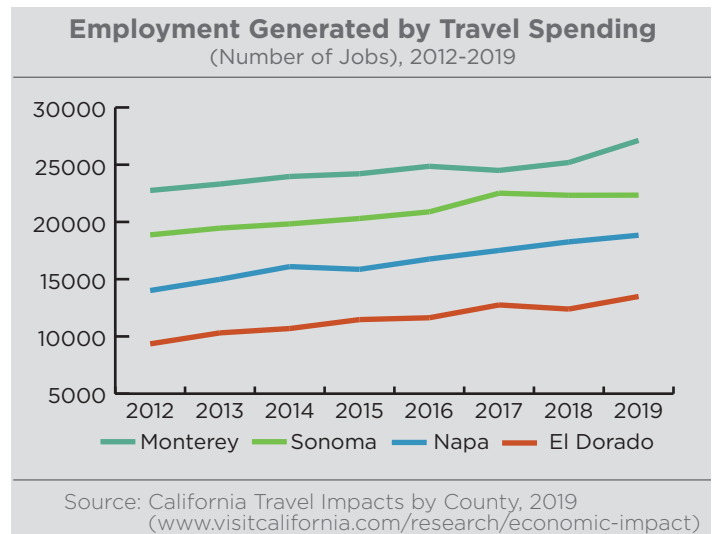
INDUSTRY EMPLOYMENT

Employment Generated by Travel Spending

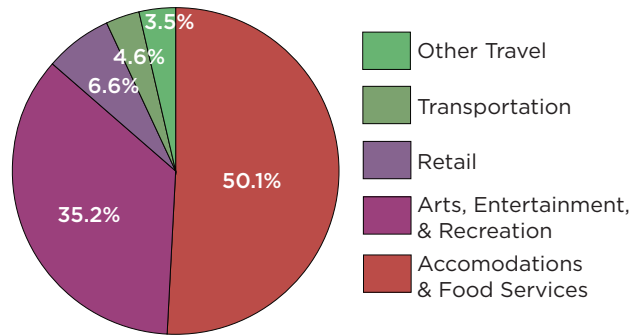
With 22,340 jobs generated by tourist destination spending, Sonoma County ranks second against comparable counties - Monterey had 27,120 tourism jobs, Napa had 18,840 tourism jobs, and El Dorado had 13,490 tourism jobs in 2019. The tourism industry remains the largest employer in Sonoma County.

Sonoma County Tourism Employment by Sector

Distribution of employment within Sonoma County's tourism industry is similar to previous years, with 50.1% of employment in accommodations & food services, 35.2% in arts, entertainment & recreation, 6.6% in retail, 4.6% in transportation and air travel (Other Travel) have also increased their share of employment at 4.6% and 3.5%, respectively.



Tourism Workforce by Sector Sonoma County, 2019



Source: California Travel Impacts by County, 2019
(www.visitcalifornia.com/research/economic-impact)

TOURISM INDUSTRY INDICATORS

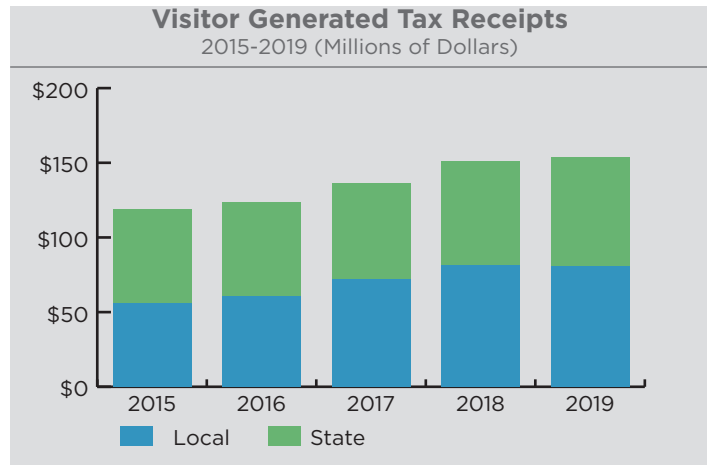
TOURISM-GENERATED TAXES

Visitor Generated by Tax Receipts

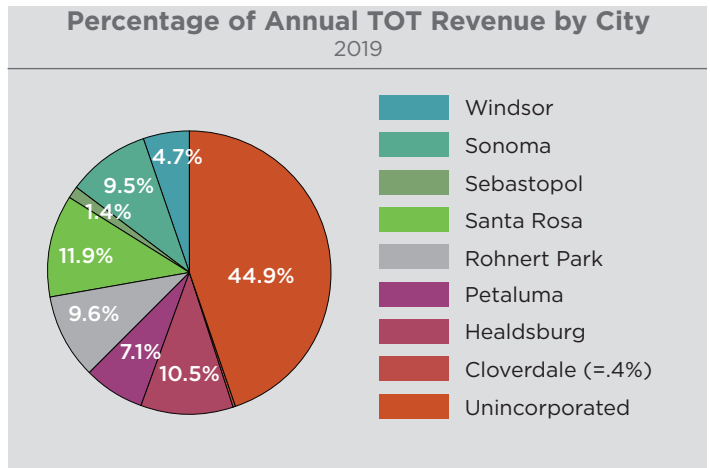
Spending by day travelers and overnight visitors to Sonoma County generate a significant amount of tax for state and local governments. Total local taxes collected from visitors to Sonoma County were estimated at \$81 million in 2019. Total state taxes collected from those same visitors was \$72.7 million in 2019. Total local and state tax collection increased by \$2.7 million or 1.75% from 2018.

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 55% of all revenue in 2019, while the unincorporated areas of the county generated 45%.



Source: California Travel Impacts by County, 2019 (www.visitcalifornia.com/research/economic-impact)



Source: Sonoma County Economic Development Board Transient Occupancy Tax Quarterly Reports 2019

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
Cloverdale	15	6	149	0.7	0.6	1.4
Healdsburg	170	66	1,702	8.3	7.2	15.5
Petaluma	212	82	2,117	10.4	8.9	19.3
Rohnert Park	200	77	1,993	9.7	8.4	18.2
Santa Rosa	477	184	4,767	23.3	20.1	43.4
Sebastopol	31	12	308	1.5	1.3	2.8
Sonoma	162	63	1,616	7.9	6.8	14.7
Unincorporated Area	862	333	8,610	42.1	36.3	78.4
Windsor	101	39	1,009	4.9	4.3	9.2
COUNTY TOTALS	2,230	862	22,270	109	94	203

*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

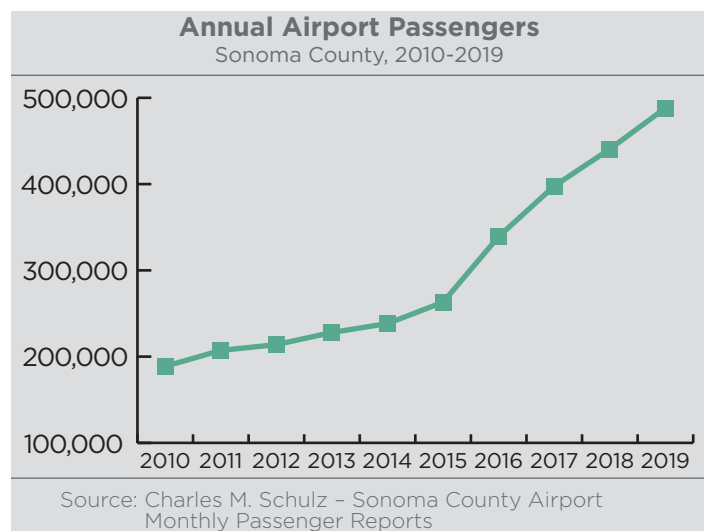
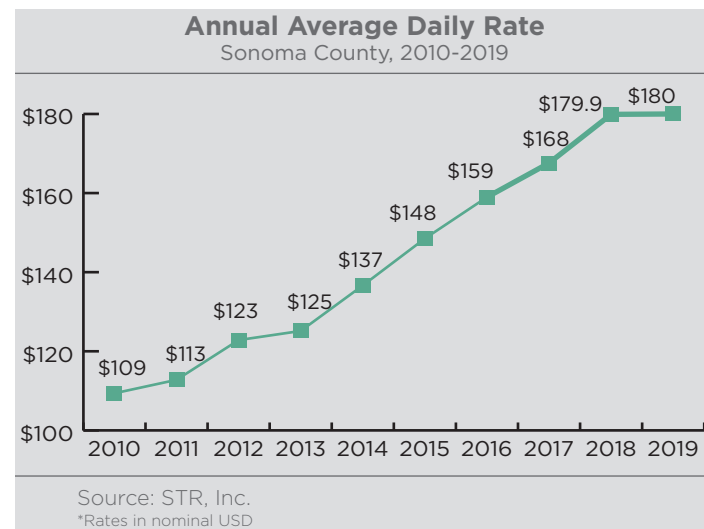
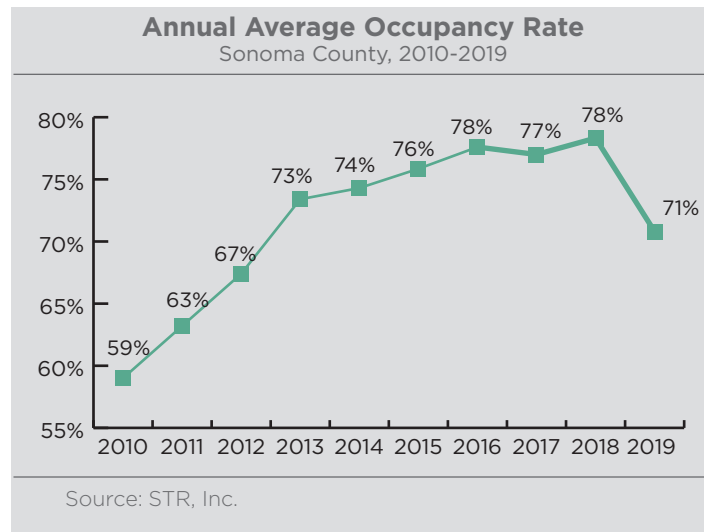
The occupancy rate for Sonoma County is determined by dividing the total room nights sold divided by the total room nights available for purchase. The average annual occupancy in 2019 was 71%.

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. This number has increased every year since 2010. For 2019, the average daily rate improved ever so slightly by increasing from \$179.90 in 2018 to \$180 in 2019.

SANTA ROSA AIRPORT

Arrivals at Charles M. Schulz-Sonoma County Airport climbed 10.8% through 2019 compared with a year earlier, as United Airlines launched a new route from Denver in March and American Airlines launched a new route from Dallas in June. The airport served over 488,000 passengers in 2019.



TOURISM INDUSTRY INDICATORS

TOURISM-GENERATED TAXES

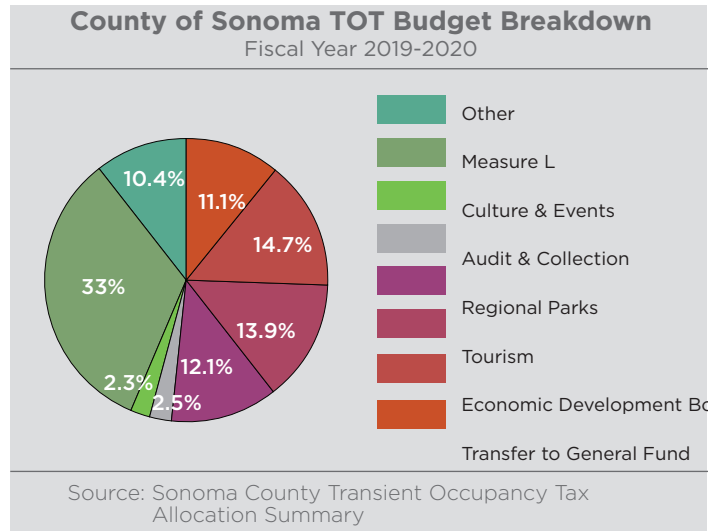
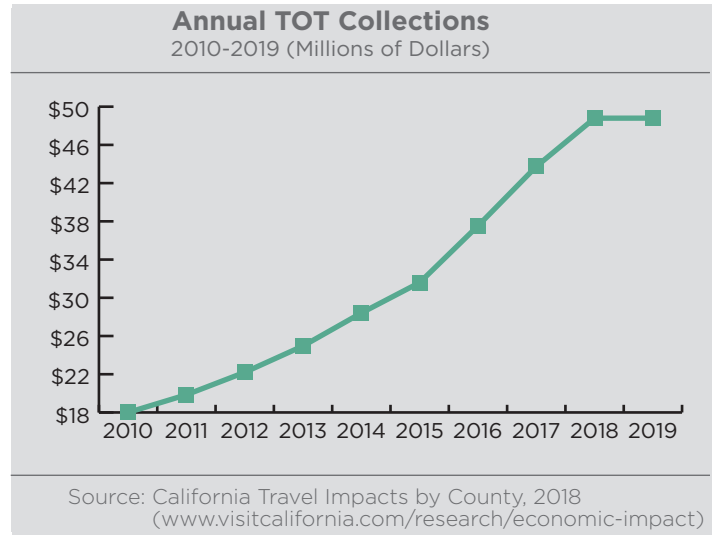
Transient Occupancy Tax (TOT) is a local tax on room rental revenue in lodging properties located in Sonoma County. The TOT rate varies between 9% and 14% from city to city.

Annual TOT Collections

TOT revenues in Sonoma County remained the same with \$48.80 million generated in both 2018 and 2019. 2018 and 2019 tie for the highest amount of TOT revenue generated for the county.

TOT Revenue Spending Areas

TOT funds are distributed to three main spending areas: General Fund Contribution (13%), Community Investment Fund (54%), and Measure L (33%). Each municipality collects tourism and occupancy taxes and have their own discretion on how those funds are spent. Only the funds collected from unincorporated areas are used on these county spending areas and measures. Within the Community Investment Fund, the majority of TOT funds go to Economic Development (14.7%) and Tourism (13.9%). Measure L includes road repairs; fire and emergency services; affordable housing; event facilities improvements; tourism Impact fund; code enforcement and compliance.



SONOMA COUNTY VISITOR PROFILE

Sonoma County Tourism, in partnership with Longwoods International, has developed a visitor profile of overnight visitors to Sonoma County in 2019. This profile was developed by surveying 510 travelers who had visited Sonoma County within the past 12 months.

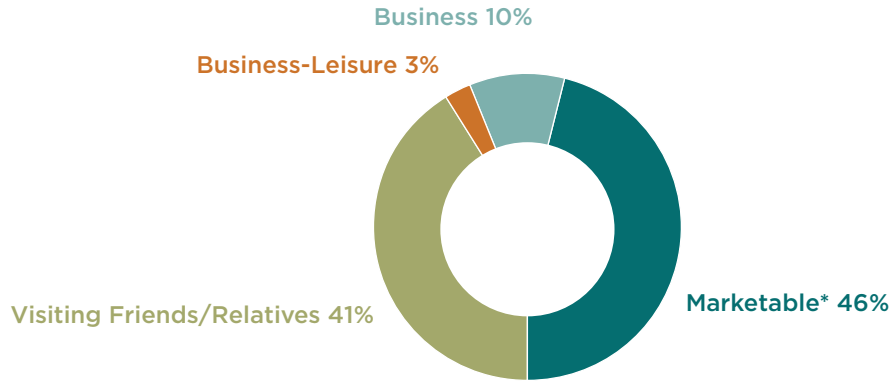
KEY FINDINGS

- In 2019, Sonoma County welcomed 4.9 million overnight visitors. 4 million (83%) of these visitors were adults and (17%) were children.
- Total overnight visitor spending in Sonoma County in 2019 totaled \$1.024 billion.
- Average spending per-person on domestic overnight trips was \$206 and per-party was \$530.
- The main reasons for travel to Sonoma County were visiting friends and relatives, touring trips, and the outdoors. The top activities and experiences enjoyed by guests are visiting wineries, shopping, fine/upscale dining, visiting landmarks/historical sites and visiting beach/waterfront.
- The average overnight visitor stays in Sonoma County for 2.3 nights.



SONOMA COUNTY VISITOR PROFILE

Reason for Travel



*Trips influenced by marketing efforts

Source: Longwoods International



2.8 People

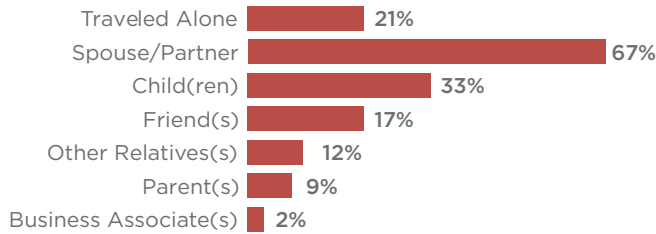
Size of the average travel party visiting Sonoma County



2.3 Days

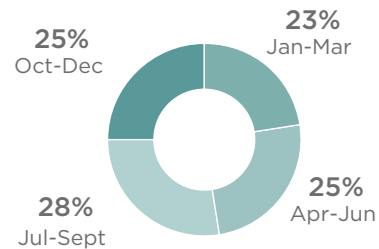
Average length of time spent in Sonoma County

Composition of Immediate Travel Party



Source: Longwoods International

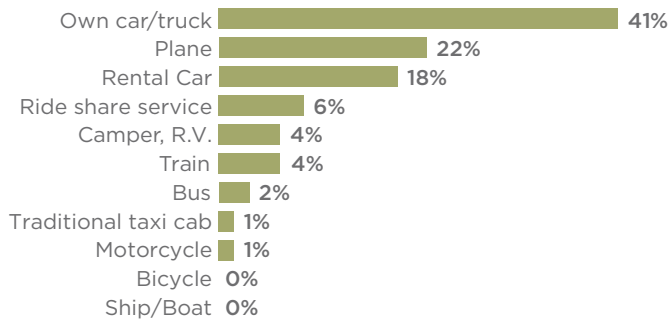
Season of Trip



Source: Longwoods International



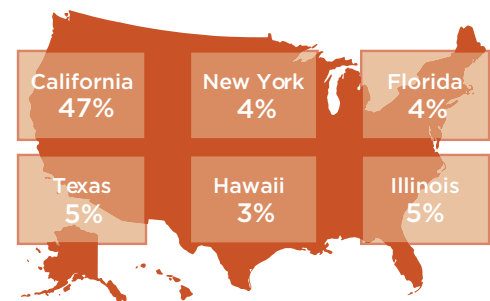
Top Methods of Transportation



Source: Longwoods International



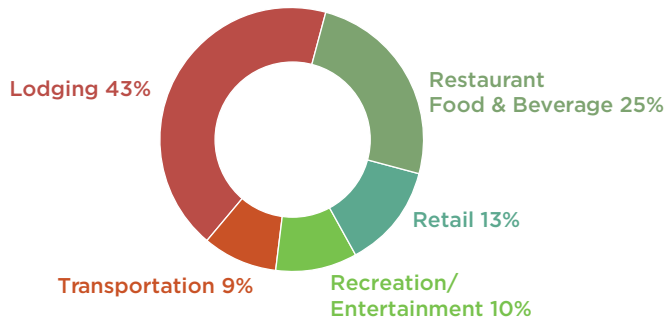
Top Feeder States For overnight trips



Source: Longwoods International

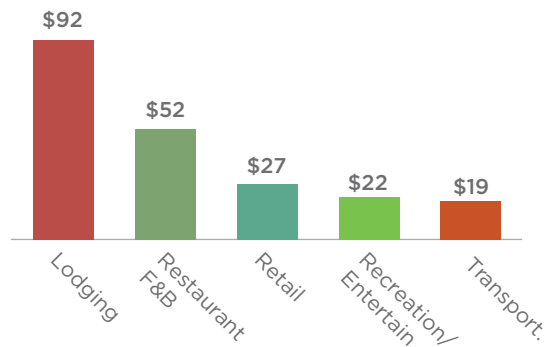
SONOMA COUNTY VISITOR PROFILE

Domestic Overnight Expenditures by Sector



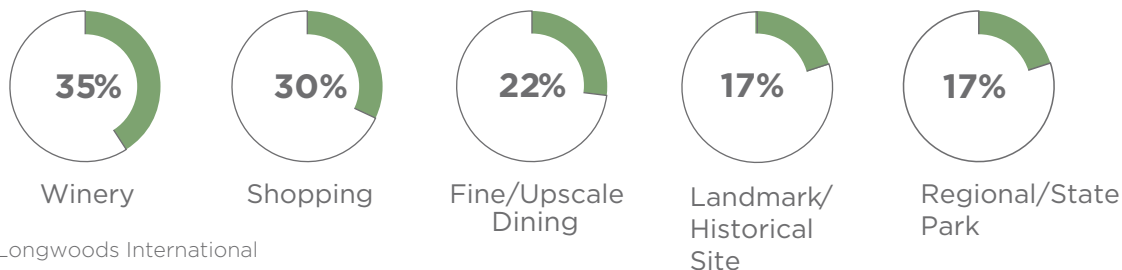
Source: Longwoods International

Average Per Person Expenditures on Domestic Overnight Trips



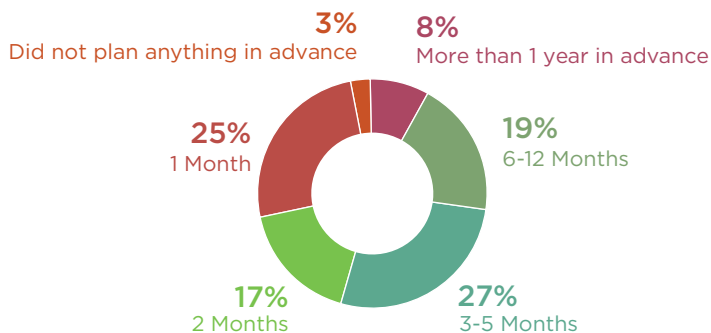
Source: Longwoods International

Top Activities



Source: Longwoods International

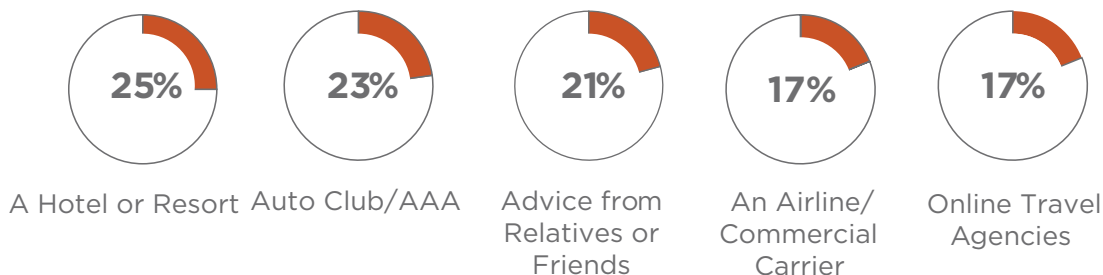
Length of Trip Planning



Source: Longwoods International

NOTE:
71% of overnight travelers planned their trips **2 Months** or more in advance

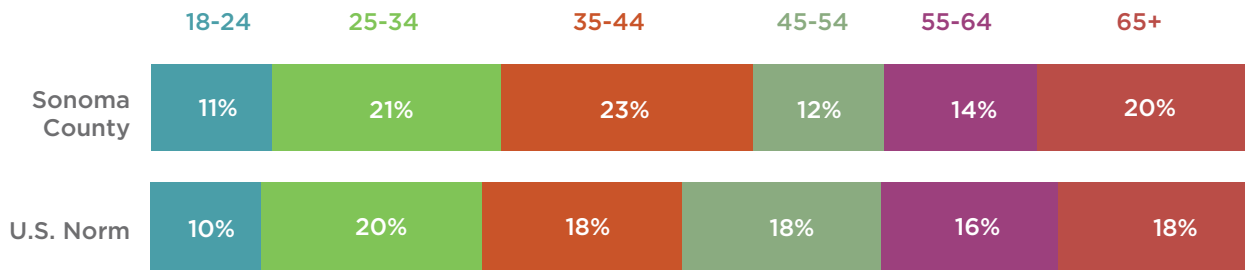
Top Sources for Trip Planning Information



Source: Longwoods International

SONOMA COUNTY VISITOR PROFILE

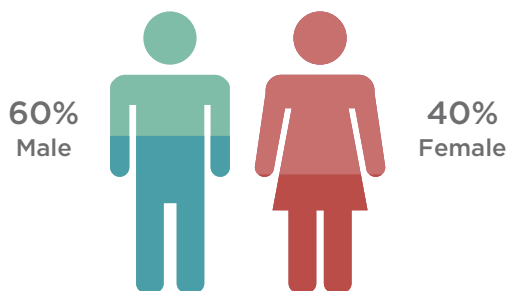
Age



Source: Longwoods International



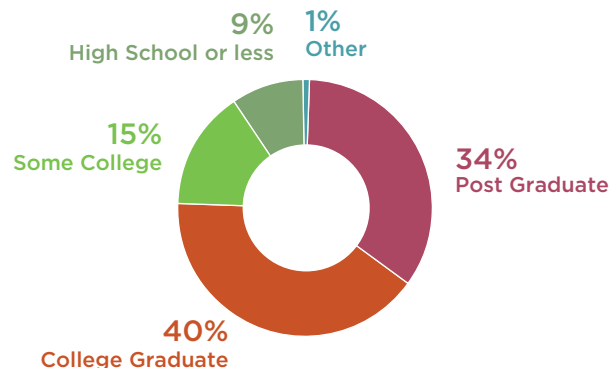
Gender



Source: Longwoods International



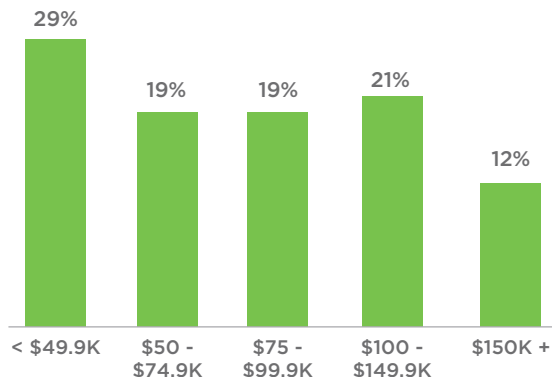
Education



Source: Longwoods International



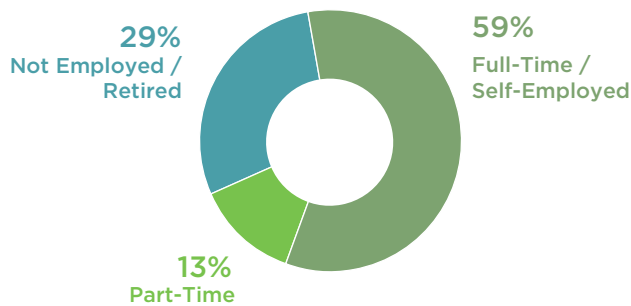
Household Income



Source: Longwoods International



Employment



Source: Longwoods International

GLOSSARY

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

The 2020 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.

Samantha Eves, Bradley Johnson, and Max Brownlee, the EDB's Industry Cluster Support Coordinator, 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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