



Annual Tourism Report

2015
SONOMA
COUNTY

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Annual Tourism Report

July 2015

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism, is pleased to bring you the 2015 Annual Tourism Report. The 2015 Annual Tourism Report contains three sections integrating findings on the local tourism industry. The first section contains research conducted by our research partner, Moody's Analytics. The second section of the report highlights key economic indicators produced by the California Travel & Tourism Commission and Smith Travel Research. The third section provides updated results of the EDB Annual Tourism Industry Survey.

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

- Sonoma County's tourism industry is maintaining a strong expansion. This marks the continuation of four years of growth in which tourism has outpaced the rest of the economy.
- The long-term outlook for Sonoma County tourism remains strong. The region continues to grow in recognition as a premier tourist destination, and its proximity to Bay Area attractions and airports is driving its expansion.

The California Travel & Tourism Commission provides a 'Travel Impacts by County' report each year. This report provides the latest available economic impact figures on Sonoma County and along with the most recent lodging statistics. These are the primary sources for the Tourism Industry Indicators. Key findings include:

- Key tourism indicators show that travel is booking in Sonoma County following the economic downturn beginning in 2007-2008. Destination spending, transient occupancy tax (TOT) receipts, industry earnings and local and state tax receipts are the highest that Sonoma County has seen in the last decade. Travelers are returning to Sonoma County and supporting the local economy through increased spending.
- Lodging indicators and occupancy rates also increased in 2014.

Each year the EDB conducts an annual tourism industry survey of Sonoma County business owners and executives involved in tourism. The survey focuses on complete industry strength, confidence, and opportunities. Key findings from this survey include:

- Businesses have a positive outlook for tourism in the coming year.
- More businesses expanded operations over the past year than in the year before.

Thank you for your interest in the Economic Development Board's research. For additional information, questions, comments, or suggestions please contact us at (707) 565-7170 or visit www.sonomaedb.org.

Sincerely,



Ben Stone
Executive Director



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Annual Tourism Report: Moody's Analytics Tourism Analysis

Recent Trends

Sonoma County's tourism industry is progressing steadily, buoyed by national and local tailwinds. San Francisco's booming economy is creating favorable spillover effects in Sonoma, boosting leisure and hospitality hiring in recent months. A robust U.S. recovery supports an upbeat outlook for national consumer spending. Though it has disappointed lately, spending will bounce back once the effects of severe winter weather subside. Real tourism spending grew faster in the second half of 2014 than in the same period a year earlier, according to the Bureau of Economic analysis. Sonoma County tourism is well-positioned to ride this trend, and rising tourist visits have prompted investments by industry players to meet growing demand. The Farmhouse Inn & Restaurant in western Sonoma County, for example, is adding more suites and a new fitness center, among other facility upgrades.

Thanks to lower gasoline prices, area wineries and newly sprouting craft breweries are benefitting from more leisure travelers arriving by car. An increase in international visitors is also sustaining hotel occupancy levels and average daily rates above 2013 levels. The average hotel occupancy rate was more than 74% in 2014, 1 percentage point higher than the prior year, according to STR.

Macro Drivers

With the Great Recession fading into the background, the U.S. economy is poised to grow faster than at any time in the past decade. Growth has accelerated markedly in the past two years, resulting in a rapid decline in joblessness and bringing the economy closer to full employment. On average, more than 290,000 jobs have been added to the economy in each of the last six months, pulling the national unemployment rate down to 5.5% even as more workers return to the labor force.

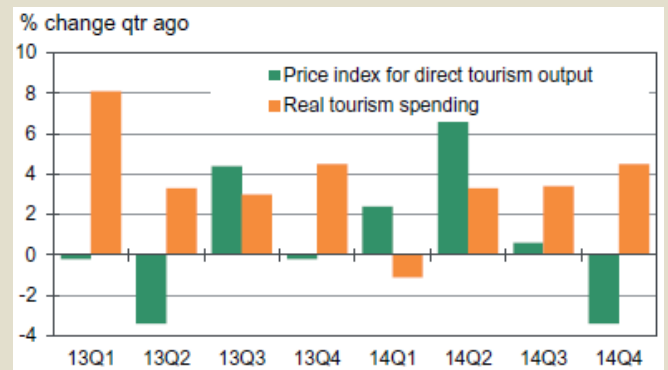
Though household balance sheets are healthier and profit margins wider for businesses, wages are stagnant for most Americans, depressing household formation and keeping the housing recovery in limbo. All ingredients are in place for stringer growth in 2015, however. Moody's Analytics forecasts real GDP growth of around 3.5% this year. As economic growth accelerates, wages will follow suit and the economy will reach full employment by mid-2016.

The dramatic and prolonged fall in oil prices has come as a surprise to both oil producers and U.S. consumers. While some drillers have been forced to scale back production, lower input costs for manufacturers and transportation are a net positive for the economy. A rise in the federal funds rate, now expected in the fall, will keep the recovery on track and prevent the economy from overheating, but risks associated with higher rates are stacked to the downside.

Weakness in the euro zone and emerging markets is also a concern for the U.S. Because of expectations of stronger U.S. growth and an impending rate hike, the dollar is appreciating against nearly every major global currency. Because of higher relative costs and reduced external demand, domestic exports are struggling to compete with rising imports.

U.S. Tourism Industry Sees Good Times Ahead

Tourism Output Growth



ources: BEA, Sonoma County, Moody's Analytics

Chart: Low prices are helping tourism output growth to accelerate. The 3.4% drop in tourism prices in the fourth quarter of 2014 is mostly attributable to "other transportation-related commodities," including gasoline and automobile rentals. This category has fallen the last two quarters, a product of plummeting oil prices. With highly elastic demand for vacations, lower prices will continue to result in greater output for the tourism industry. This holds true for Sonoma County, as its above-average prices will be more accessible to a number of visitors as transportation costs decline.

Annual Tourism Report: Moody's Analytics Tourism Analysis

Industry Drivers

With improving macroeconomic conditions, consumer confidence is steadily inflating. The Conference Board Consumer Confidence Index is four-fifths of the way back to its prerecession peak and has grown by 20 points from its year-ago level. Expectations also suggest a strong year for consumption. As measured by the Conference Board, expectations are now in line with prerecession levels and are growing steadily. Better economic news will reinforce consumer beliefs that earlier economic woes are mostly gone.

Monthly jobs reports will confirm tightening in the labor market. By raising interest rates in the fall, the Federal Reserve will tip its hat to a national economy on the brink of achieving full employment. Buoyed by such positive signals, consumer confidence is on track to peak near prerecession levels in early 2016.

Meanwhile, vacation expectations are in full bloom. According to the Conference Board, 46.3% of consumers surveyed in February planned to take a vacation within the next six months. This indicator has been steadily growing, adding 2 percentage points from year-ago levels. Furthermore, the seasonal indicator's year-end peaks are among record highs. All signs point to healthy demand for vacations, which will rise on the back of increasing disposable incomes.

Besides improving confidence, oil prices will make travel more affordable. Crude prices have fallen by more than 50% in the last six months, leading to significantly lower gasoline prices. This has not translated into lower airfare, however. Although fuel is the highest input cost for airlines, airfare tends to be sticky, so the benefits of swooning crude prices will be concentrated mostly among vehicle-driving sectors. Although crude prices will begin to rebound, the process will be gradual, and gasoline prices will stay low during the peak tourism season in 2015.

Personal consumption has been slow out of the gates in 2015 but will accelerate as spring sets in. Private consumption growth is forecast to exceed 4% in 2015. However, this overstates the effect on tourism, as housing and energy are expected to increase their global consumption share.

Household cash flow is accelerating. Rising equity prices are leading to strong dividend income gains, and personal disposable income growth accelerated appreciably in 2014. Although the increase in wages and salaries has underperformed expectations, Sonoma County's likely visitors have above-average exposure to dividend income. Therefore, sluggish wage growth will have only a moderate impact on the county.

Sonoma County's strong economy provides support for tourism growth, but weakness from consumer-dependent industries adds some downside risk. Job gains in Sonoma County were 3.3% in 2014.

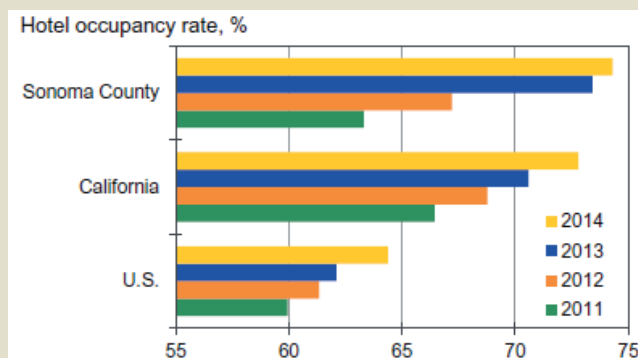
Public sector payrolls contributed greatly to this, adding 9.5% in 2014. However, arts, entertainment, recreating and accommodation, four key measures of tourism, were weak in the first three quarters of 2014. Since nearby counties are also attractive destinations for tourism, demand for Sonoma's wineries and natural scenery is fairly elastic, meaning consumers could visit other counties instead.

Pricing

Hotels across the U.S. are flexing their pricing power with greater comfort. Room rates are rapidly approaching their prerecession peak with average daily rate increasing by 4.6% and revenue per available room by 8.3%, according to STR. Room occupancy rates in 2014 have largely outperformed the median of 200 to 2007, reported the same source, and grew by 3.6%. Even the severe winter weather in early 2014 did not appreciably affect occupancy rates. Occupancy will remain strong in the near term, as it takes times to build new hotels in response to greater demand from transient travelers. Leisure and business travelers are boosting occupancy rates, which ended 2014 at 64.4%—the highest level in more than a decade—according to STR. In addition, the number of group travelers, which fell dramatically during the recession, is growing steadily.

Price for food consumed outside the home in 2015 will rise more than 2%. Moreover, demand will support a 1.4% increase in the national price of alcoholic beverages, critical to the growth of wine-related tourism in Sonoma County. Despite a strong grape harvest in 2014, inventories are balanced, allowing Sonoma County wineries to raise prices and boost profit margins.

Sonoma Maintains High Occupancy Rates



Source: Smith Travel Research, Moody's Analytics

Chart: The persistent strength in hotel occupancy rates demonstrates the local tourism industry's ability to effectively ride the coattails of the buoyant U.S. recovery. The labor market is rapidly approaching full employment, which is expected to boost wage growth later this year and allow more Americans to trade up to higher-end leisure/hospitality activities. Demand for luxury wines is surging, and Sonoma's wineries will remain a formidable draw for tourists, and especially domestic transient travelers in the Silicon Valley and Bay Area.

Annual Tourism Report: Moody's Analytics Tourism Analysis

Operating expenses

Growth in Sonoma County's leisure/hospitality sector surged in the last few months of 2014, outpacing that in the rest of the local economy. As more slack in the labor market is absorbed, especially at the low-wage end, higher wages are in store for leisure/hospitality workers.

The commercial real estate market is tightening and applying upward pressure on rental prices. According to Keegan & Coppin Co., office and industrial vacancy rates in Sonoma County fell on an annual basis by 2.6 and 2.3 percentage points, respectively, in the fourth quarter of 2014. The long-standing increase in land set aside for preservation in Sonoma County will prevent property developers from satisfying growing demand for commercial real estate, thereby perpetuating price rises.

Profitability

The trajectory of prices will outstrip the increase in operating costs, helping the tourism industry's profit margins. Even though hotel occupancy rates rose only marginally, average daily rates surged by 12% in 2014, driving growth in revenues from hotel stays. Revenue per available room in Sonoma County hotels jumped by 20% in the first half of 2014 compared with the same period a year earlier, according to STR. A 2013 ballot box initiative, which would have restricted the construction and enlargement of hotels with over 25 rooms, could have boosted the pricing power of hotels over the long term by delaying a rebalancing of supply and demand for hotel rooms. However, in the near term, Sonoma County hotels will hold sway over room rates, as visitations to the area continue to fuel demand and large-scale development projects such as a planned 200-room hotel addition to the Graton Resort & Casino have yet to materialize.

Growing demand for higher-end wines will benefit not only Sonoma County producers but also the county's allure for wine-tasting, which has long been a draw for tourists. However, a new player is gaining salience in the local alcoholic beverages sector. Craft brewing is strengthening, as younger consumers nationwide are substituting artisanal brews for traditional big-name brands. The sprightly gait in the U.S. recovery will maintain the momentum of craft breweries, as a tightening labor market and wage growth set to accelerate this year will put more money in consumer's pockets, enabling them to upgrade their beer consumption to pricier craft brews.

Long-term Outlook

Sonoma County's tourism industry is firmly grounded and poised for further growth. Proximity to the Bay Area's attractions, amenities and booming economy will remain significant tailwinds for the local economy. Recent improvements at Charles M. Shulz-Sonoma County Airport will add capacity and cut layovers at San Francisco for those wishing to travel directly to Santa Rosa.

Meanwhile, the area's wine and tourism industries will benefit from the externalities associated with the most popular sporting event in the U.S. Sonoma County has been named an official destination sponsor of the 2016 Super Bowl. San Francisco's nearby economy has been on fire for a while, and nearby Santa Clara will host next year's Super Bowl, providing an extra tailwind to Sonoma's economy. Beyond the direct impact of around 1 million visitors to the Bay Area for the Super Bowl, the national attention associated with such a sporting event will enhance ongoing branding efforts for Sonoma County wine and boost visitations to local wineries. Also, greater exposure to high-spending tourists from Asia, who represent a growing share of international visitors to the U.S., will also lift tourism spending in Sonoma.

Emerging Market Tourists Will Benefit California



Sources: International Trade Administration, Moody's Analytics

Chart:

West Coast destinations are benefiting from the swift rise in Asian tourists, and such momentum will not abate. Arrivals of Chinese tourists to the U.S. are expected to grow annually by an average of 17% in the next five years. Another emerging market juggernaut, India, could offset any softness in tourism that results from China's slowdown. The rupee is appreciating, low oil prices are cutting inflationary pressure, and India's stock market is surging. Indian tourism to the U.S. is expected to jump by 47% from 2013 to 2019.

Annual Tourism Report: Moody's Analytics Tourism Analysis

Upside Risks

If low oil prices persist, they have the potential to boost disposable incomes and provide a significant upside for local travel, especially visits to popular wine-tasting sites and fast-growing craft breweries. Prior to the sudden decline in oil prices, increases in travel-related spending had more to do with higher costs than increased travel, according to the Global Business Travel Association. That trend has reversed in recent months and will serve as a tailwind to Sonoma County tourism should it continue. Moreover, robustness in the Bay Area economy can be an extra boost to local tourism. Income growth in the San Francisco metro year has far outpaced the national average in past years, and if such strength persists, it would pay immediate dividends to Sonoma County tourism due to greater spending by Bay Area visitors.

Sonoma's efforts at raising brand recognition for area wines could culminate with the 2016 Super Bowl and present an opportunity to boost wine sales and wine-related tourism. This becomes more plausible given that Sonoma County wines enjoy a competitive advantage over Napa County wines in terms of affordability. In addition, with a large share of millennials approaching their prime earning age, craft breweries can be another growing attraction. Despite improved marketing efforts and the creation of special American Viticulture Areas in the Sonoma region, there is still a long road ahead in reaching prospective consumers.

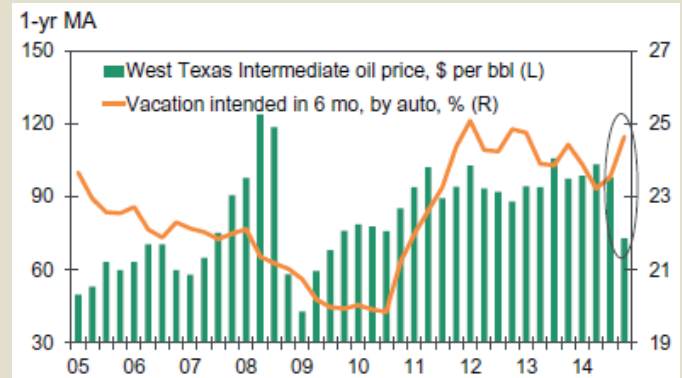
Downside Risks

A faster than expected appreciation of the U.S. dollar poses a significant downside risk and could weigh heavily on arrivals of middle-income international tourists. The confluence of a slowdown in emerging market economies, a weak recovery in Europe, and a strengthening dollar can hurt the inflow of foreign tourists to Sonoma. If an elevated degree of risk aversion settles in globally as was the case during the Great Recession, it would drain travel-related expenditures. Fewer international tourist arrivals to Sonoma County would lower occupancy rates at area hotels, reduce the number of visits to wineries, and weigh on area restaurants.

Further, a pending court ruling has the potential to present another downside to Sonoma County's tourism. The legally challenged executive actions on immigration may backfire and create more resistance to efforts to legalize undocumented immigrants. A pending appeals court ruling could lift the executive action intended to spare from deportation nearly 5 million people. Should the court rule against the Obama administration, potential deportations coupled with stronger border enforcement could hurt labor supply, especially at hotels and restaurants, placing strain on employers.

Finally, Sonoma County is not immune to the effects of the statewide drought that is entering its fourth year. Over time, a prolongation of the drought statewide would necessitate further intensification in water rationing that could force people and businesses to cut their economic activities as a result of altering water supply.

Oil Price Plunge Reverses Auto Tourism Trend



Sources: EIA, The Conference Board, Moody's Analytics

Chart: Falling crude oil prices are leading to lower prices at the pump, boosting vacation expectations. With cheaper gasoline, travel by car is less expensive. Further, lower prices at the pump help disposable income, supporting spending on expenses not related to travel, including lodging, food and beverages. However, sticky airline prices are not responding to lower fuel prices. Although greater disposable incomes allow consumers to fly more, the cost of flying is higher, so travelers will substitute toward driving, meaning the largest impact will be on auto tourism.

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Tourism Industry Indicators

Sonoma County Tourism Industry Indicators

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

Marin and Napa are used as comparison counties because of their similarities in offerings, size, and geographical location. The featured data is the latest available from the California Tour and Travel Commission.

Key Findings

- In 2014, Sonoma County destination spending, industry earnings and industry employment experienced a year-over increase from 2013 after adjusting for inflation. This follows an increase seen in 2012 over 2013. This suggests travel continues to grow as the U.S. moves out of the recession.
- In 2014, Sonoma County's year-over average daily rate (ADR) for lodging increased 14% when adjusted for inflation. This follows a 2.6% increase in 2013, further suggesting that travel is returning to Sonoma County.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$28 million in 2014 after adjusting for inflation. This is the highest level of TOT receipts that Sonoma County has ever received.

Annual Tourism Report: Tourism Industry Indicators

Destination Spending

Destination spending is the total amount spent by visitors in Sonoma County. This indicator includes all spending for accommodations, wine activities, retail, and other tourism related purchases. The most recent figures show that Sonoma County's destination spending was up 2.4% from \$1.6 billion in 2013 to \$1.64 billion in 2014.

Destination Spending by Year

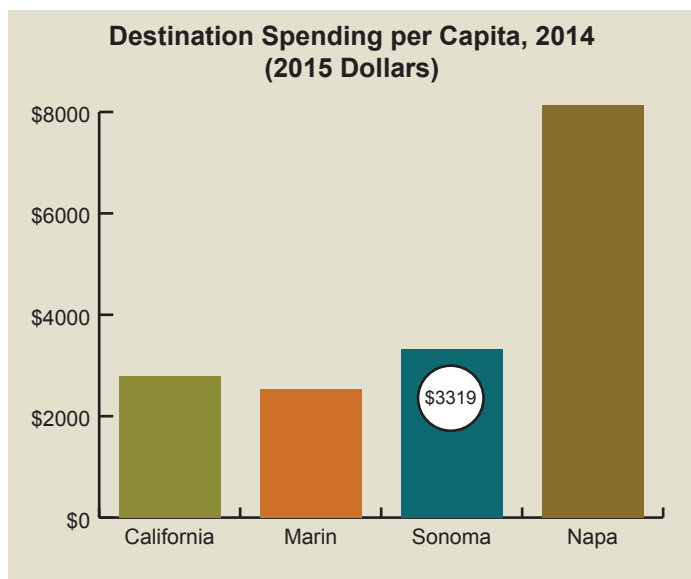
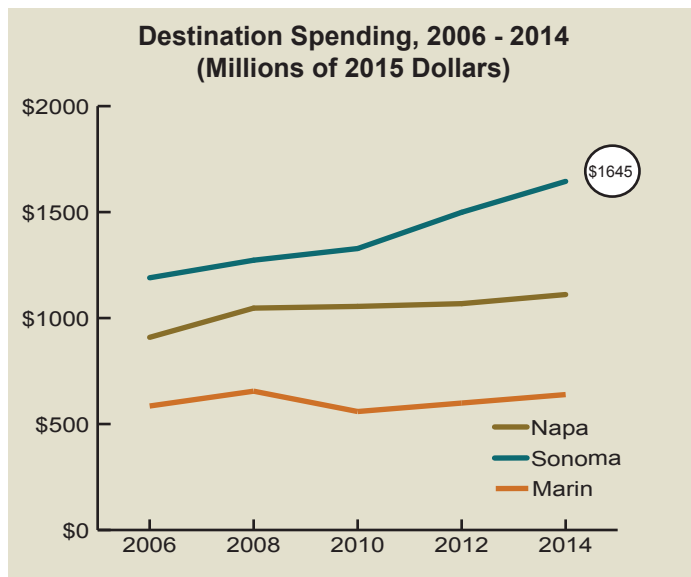
Destination spending is sensitive to the economic climate. As a result, Sonoma County experienced decreases in destination spending in both 2008 and 2009. This was a common trend as all of the competitive destinations also experienced decreases. However, 2014 figures indicate that tourism remains strong in Sonoma County as well as in other destinations.

Destination Spending per Capita

For each of Sonoma County's 495,684 residents, \$3,319 in destination spending was generated. Marin County generated \$2,535 per-capita and Napa County generated the highest per-capita spending at \$8,140. Napa County consistently has high per-capita destination spending due to its relatively small population. Sonoma County's destination spending per-capita fell short of Napa County, but outpaced the statewide average of \$2,799 per capita.

Destination Spending Annual Real Growth Rates

The 2.4% increase in inflation-adjusted destination spending was a positive indicator for tourism in Sonoma County, following the same increase in the year prior. These increases indicate that direct spending is on track with pre-recession levels. This growth also outpaced that of Napa County for 2013.



Source for all data: California Travel Impacts by County, 2015



Annual Tourism Report: Tourism Industry Indicators

Destination Spending Breakdown

As in previous years, the overall distribution of commodity based visitor spending in Sonoma County is comparable to the featured competitive counties and the statewide average. However, there are several areas where Sonoma County appears to be somewhat unique.

Distribution of Visitor Spending by Commodity

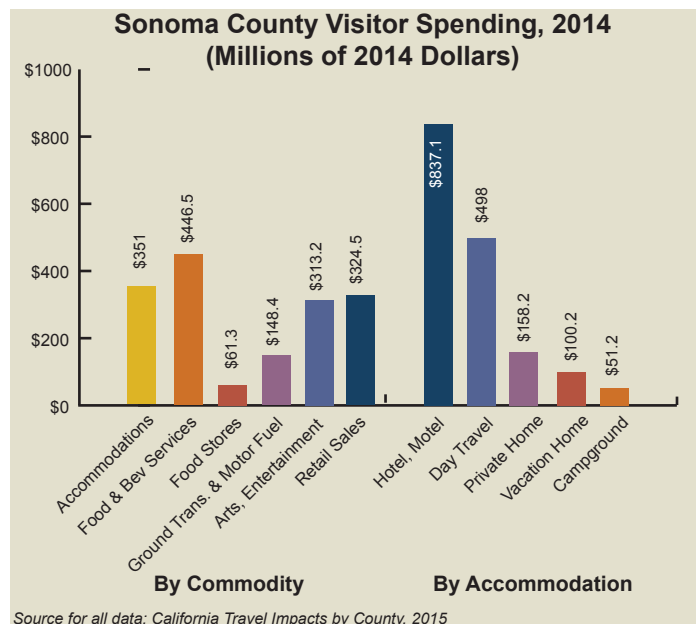
Visitors to Sonoma County devote a smaller share of their spending towards accommodations than other destinations - 21% of all spending, compared to 29% in Marin County and 28% in Napa County. Sonoma County visitors spend an approximately equal share of total spending on accommodations (21%), retail purchases (19.7%), and arts, recreation & entertainment (19%). They spend the largest amount on food and beverage services (27%) and on retail sales. Visitors to both Napa and Sonoma County spend more than the state average on arts, entertainment & recreation, and retail sales.

Distribution of Visitor Spending by Accommodation

In comparison with the state and other competitive counties, a smaller share of visitor spending in Sonoma County comes from visitors who are staying in a hotel or motel (50.9% compared to 59%, 69%, and 57% for Marin County, Napa County and California, respectively). Instead, a significant share of Sonoma County visitor spending is received from day travelers (30.3%) compared to 17% for Marin, 25% for Napa and 23% for California. A comparatively larger share of spending in Sonoma County comes from visitors who stay in vacation homes (6.1%) compared to 17% for Marin, 25% for Napa and 23% for California. A comparatively larger share of spending in Sonoma County comes from visitors who stay in vacation homes (6.1%).

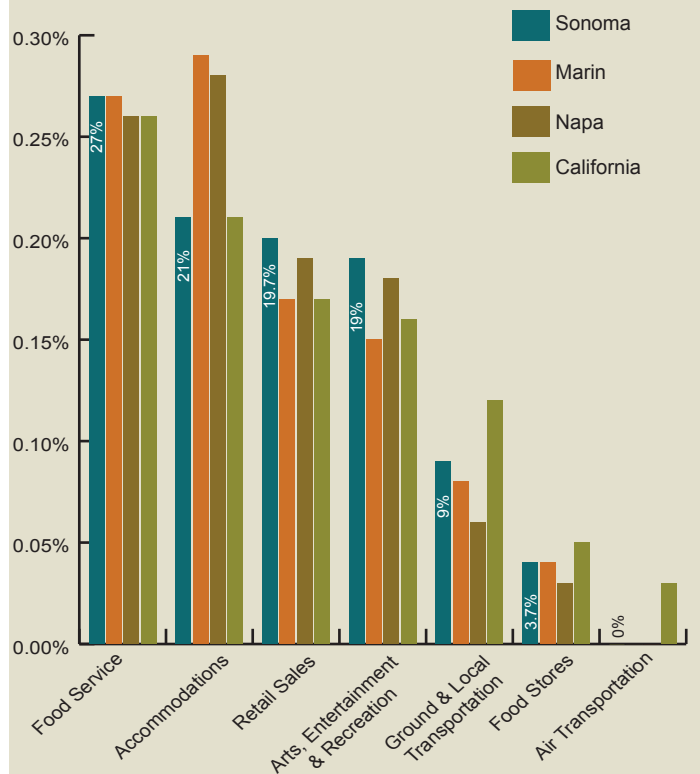
Sonoma County Visitor Spending

With a total visitor spending equal to \$1.64 billion, the majority of the money is spent by visitors who stay at hotels or motels (\$837.1 million) and on day travel (\$498 million).

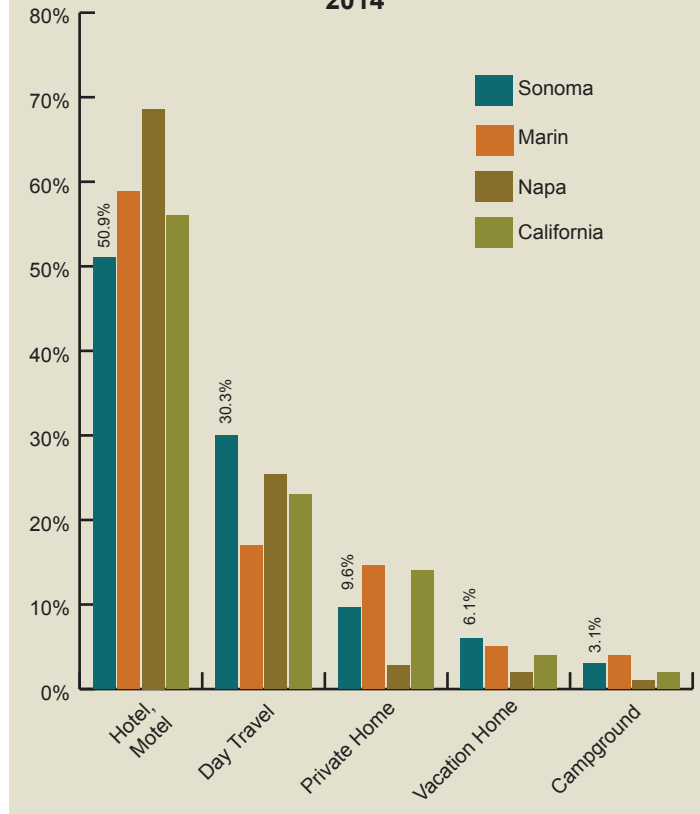


Source for all data: California Travel Impacts by County, 2015

Distribution of Visitor Spending by Commodity, 2014



Distribution of Visitor Spending by Accommodation, 2014



Annual Tourism Report: Tourism Industry Indicators

Industry Employment

With 19,350 jobs generated by tourist destination spending, Sonoma County ranks first against comparable counties - Napa had 13,230 tourism jobs and Marin had 7,310 tourism jobs in 2014. Sonoma County's 2014 job figures show a 2.4% increase from 2013, up from a year-over increase of 5.5% from 2012 to 2013.

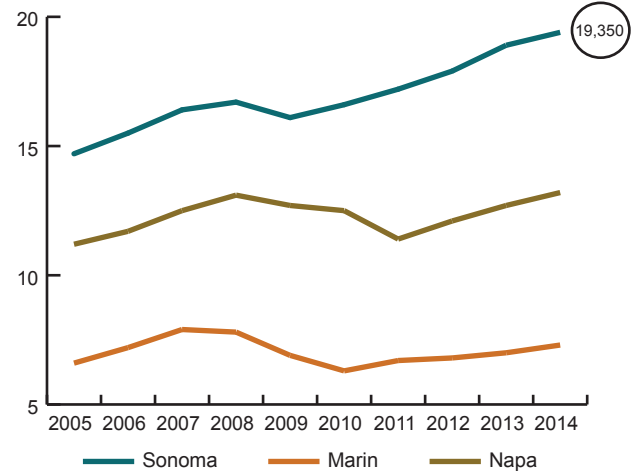
Tourism Industry Earnings per Employee, Real Growth Rates

Partly as a result of Sonoma County's decline in destination spending in 2008 and 2009, employment levels in the tourism industry decreased in 2009 and 2010. Businesses are starting to add staff as destination spending returns to pre-recession levels. For 2014, the tourism in Sonoma County accounted for 19,350 jobs. The county employs more tourism industry employees than Napa and Marin, counties where total destination spending consistently outpaces that of Sonoma County. Industry earnings per employee grew for Sonoma as well (\$28,733). Because of Marin and Napa's smaller employment base, those counties experience higher earnings per tourism employee. Focusing on Sonoma County, growth in tourism earnings is nearing pre-recession levels.

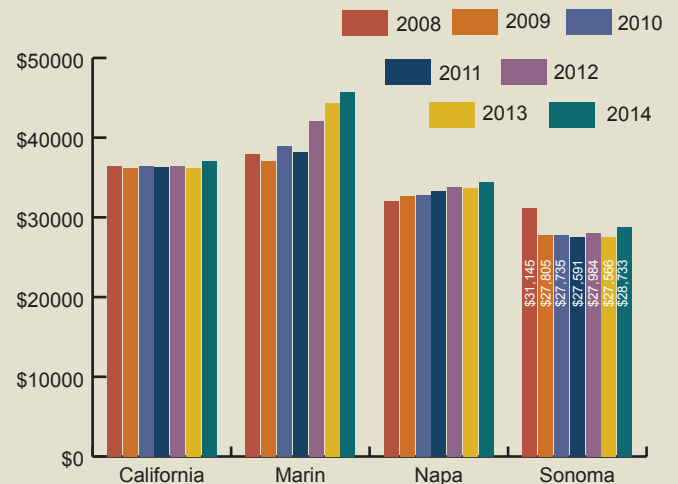
Sonoma County Tourism Employment by Industry

Distribution of employment within Sonoma County's tourism industry is similar to previous years, with 52% of employment in accommodations & food services, 36% in arts, entertainment & recreation, and almost 8% in retail. Ground transportation and air travel (Other Travel) have also increased their share of employment at 2.3% and 1.4%, respectively.

Employment Generated by Destination Spending, 2005-2014 (Thousands)

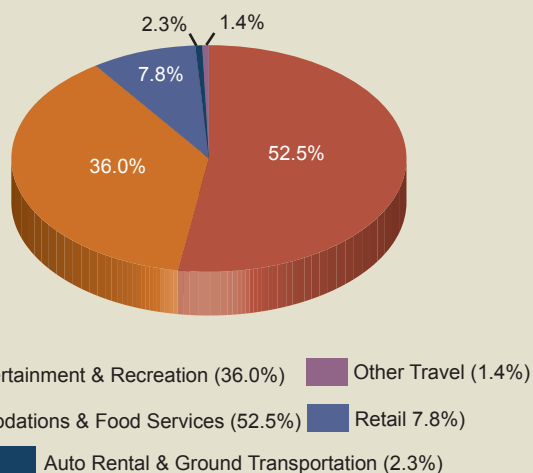


Tourism Industry Earnings per Employee, 2008-2014 (2015 Dollars)

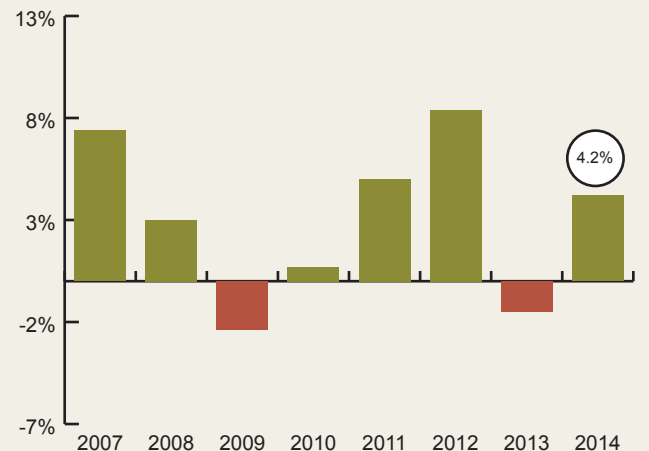


Source for all data: California Travel Impact by County, 2015

Sonoma County Tourism Employment by Industry, 2014



Tourism Industry Earnings per Employee, Real Growth Rates, 2007-2014



Annual Tourism Report: Tourism Industry Indicators

Lodging & Hospitality Assessment

As page 4 illustrates, visitors staying in hotels and motels are the single-largest source of destination spending in Sonoma County, with an estimated \$837 million in spending in 2014 (2015 dollars). Lodging figures from 2014 show that travel to Sonoma County continues to grow following the national economic downturn, indicating that we can expect to continue seeing positive trends in destination spending.

Annual Lodging Occupancy Rates

Sonoma County's occupancy rates stayed relatively stable amid expansion in Sonoma County's room offerings through 2007. During 2008 and 2009, however, average occupancy dropped as the recession decreased discretionary consumer spending. Occupancy rates have been steadily increasing since 2009, surpassing pre-recession levels at 74% in 2014.

Annual Average Daily Rate (ADR)

Average daily rate (ADR) began to increase following the low seen in 2010 at \$118.92 (2014 Dollars). For 2014, the average daily rate improved to \$136.64, in line with other positive figures for travel into Sonoma County.

Revenue per Available Room

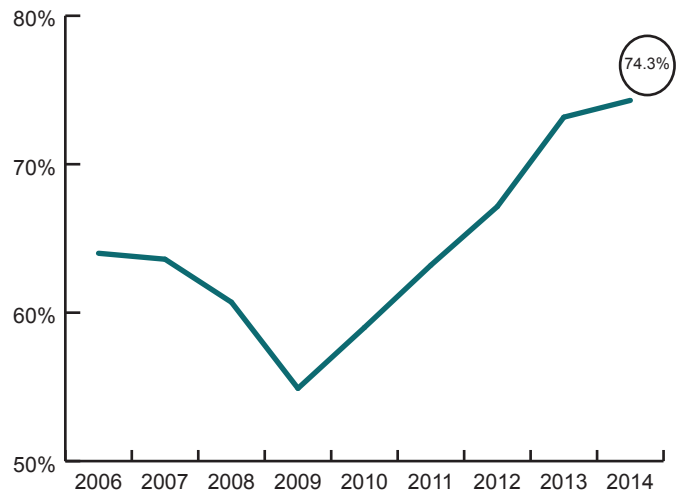
Revenue per available room (RevPAR) for Sonoma County have been increasing since 2009. In 2013, RevPAR surpassed pre-recession levels, highlighting the strengthening tourism industry in Sonoma County.

Real Growth Rates of RevPAR and ADR

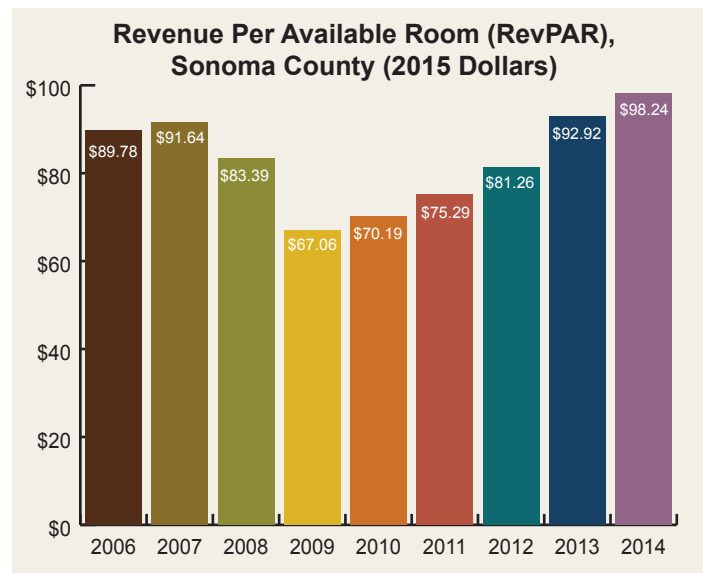
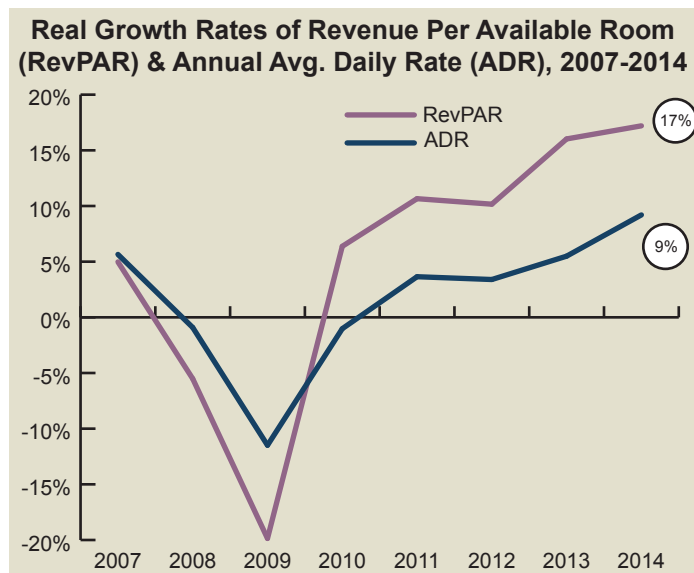
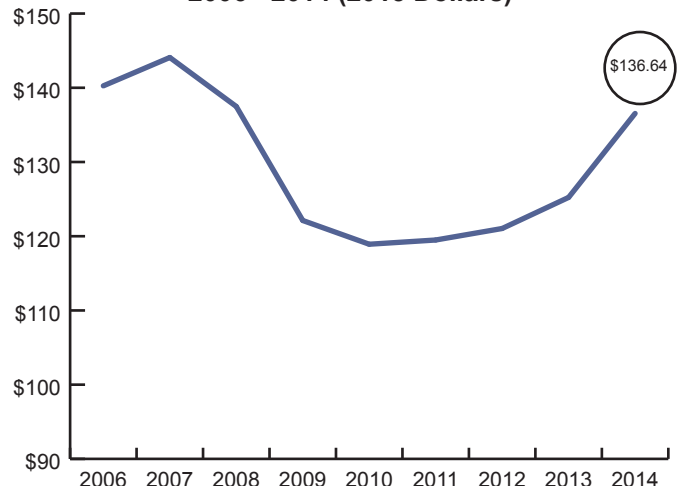
Revenue per available room and average daily rate have both increased from 2010 to 2014. As occupancy rates and average daily rate both increase, revenue per available room is expected to maintain above pre-recession levels.

Source for all data: Smith Travel Research, 2015

Annual Lodging Occupancy Rates, Sonoma County, 2006-2014



Annual Average Daily Rate (ADR), Sonoma County, 2006 - 2014 (2015 Dollars)



Annual Tourism Report: 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 12% from city to city.

Annual TOT Collections

TOT revenues in Sonoma County increased 2% to \$28 million in 2014 when adjusted for inflation. TOT revenues fell in 2008 and 2009 as the recession began to negatively affect visitor traffic and spending nationwide. This downward trend has been fully reversed with 2014 TOT revenues being the highest ever in Sonoma County.

TOT Revenue Spending Areas

TOT funds are distributed to different spending areas. The majority of TOT funds go to regional park maintenance and operation (20%), tourism marketing (19%), or are transferred to the general fund in each city or area (25%).

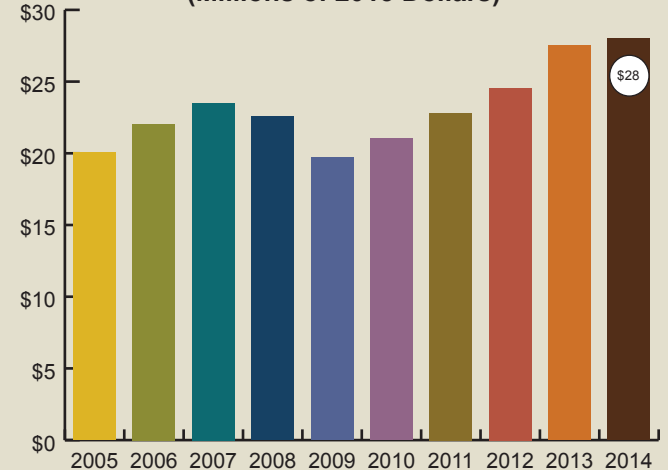
Tax Receipts Generated by Travel Spending

Spending by day travelers and overnight visitors to Sonoma County generates a significant amount of tax for state and local governments. Total local taxes collected, including TOT, from visitors to Sonoma County were estimated at \$64 million in 2014, after adjusting for inflation. The state collected \$79 million from Sonoma County visitors in 2014, after adjusting for inflation. This is a comparable amount compared to 2013 figures.

Percentage of Annual TOT Revenue by City

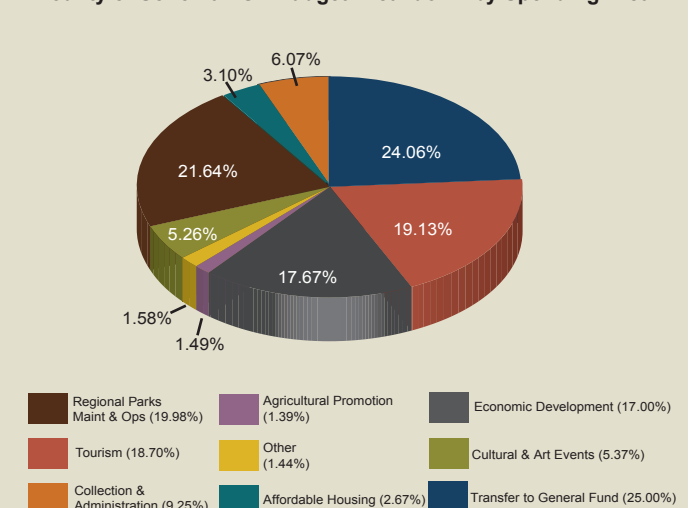
Revenues from TOT are divided between the County of Sonoma (which receives revenue from lodging properties in unincorporated regions) and the individual cities in the county. Collectively, the incorporated cities generated 61% of all revenue in 2014, while the unincorporated areas of the county generated 39%.

Annual TOT Collections, Sonoma County 2005-2014
(Millions of 2015 Dollars)



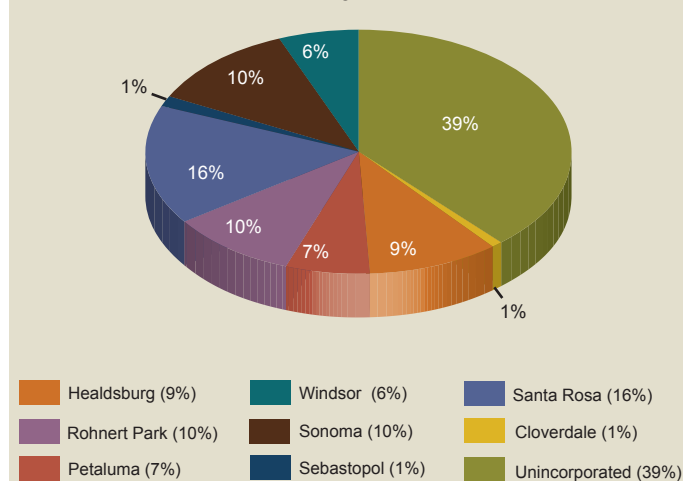
Source: Transient Occupancy Tax Reports, 2015aaa

Fiscal year 2013 - 2014 (July - June)
County of Sonoma TOT Budget Breakdown by Spending Area



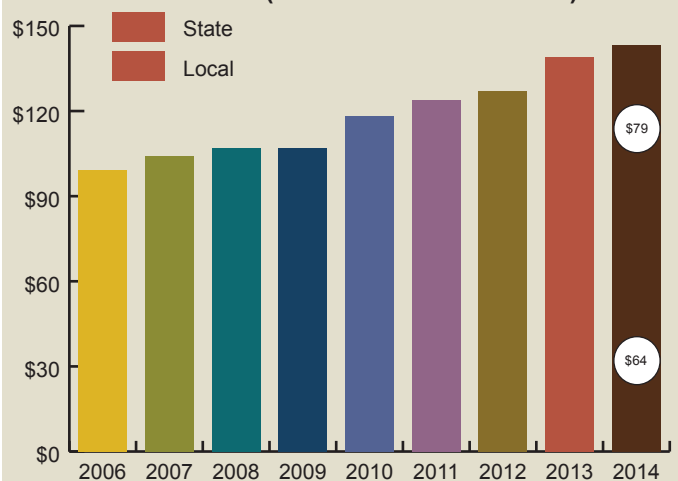
Source: Transient Occupancy Tax Reports, 2015

Percentage of Annual TOT Revenue by City, 2014



Source: Transient Occupancy Tax Reports, 2015

Tax Receipts Generated by Travel Spending, 2006-2014
(Millions of 2015 Dollars)



Source: California Travel Impacts by County, 2015

Annual Tourism Report: Tourism Industry Indicators

2014-15 Airport Visitor Intercept Survey

Last year, Sonoma County Tourism, in conjunction with the Charles M. Shulz Sonoma County Airport, initiated a year-long visitor intercept survey designed to capture information on tourists visiting Sonoma County as a travel destination and to gain an understanding of their activities while in-market.

The results of this survey, which was administered bi-monthly to travelers departing from the Charles M. Shulz airport between April 2014 and May 2015, are reported below.

On average, visitors spent 4 days in Sonoma County, and had an average travel party size of 2. While in market, the average spending per travel party was \$379 per day.

Reason for Visiting

The most common reason motivating trips to Sonoma County is visiting family and friends (36% of respondents). Another 16% of respondents indicated that their travel was specifically for business, while 15% said they were on vacation. Visitors also indicated coming for weekend getaways (11%), weddings (5%), special events including concerts and festivals (5%), and conferences or tradeshow (8%). Only 2% of travelers surveyed stated that they were just passing through the area.

Overnight Accommodation

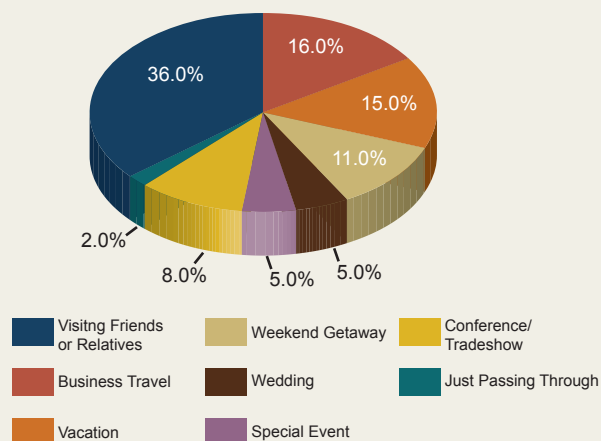
Once in Sonoma County, over 48% of respondents listed that they stayed with friends or family in a private residence. More than 34% booked lodging in hotels, while nearly 9% chose to stay in a vacation home or rental, and 7.4% stayed at bed and breakfasts. Just under 7% stayed in a motel, and roughly 2% camped or utilized an RV park.

Destination Spending Breakdown

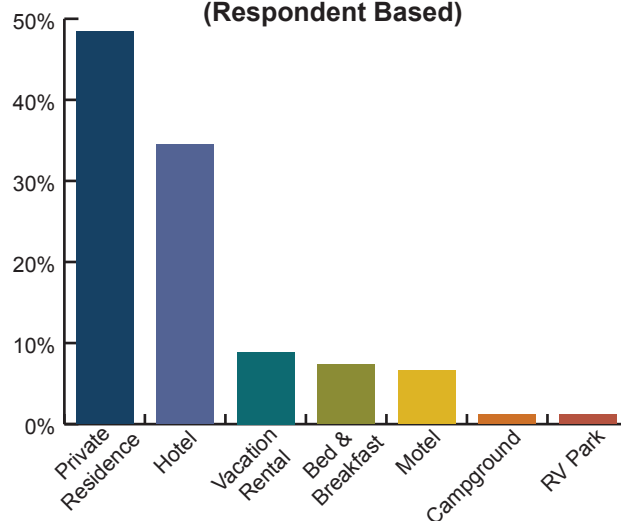
While in market, visitors reported spending on a variety of Sonoma County businesses and establishments. Most commonly, survey respondents indicated spending money on local restaurants (87%) and lodging (68%). Retail purchases was the next most popular activity, representing 66% of respondents. Just under 50% purchased wine, while 38% reported spending money on tasting room fees at Sonoma County wineries. A very high percent reported spending on local transportation (61%), likely capturing visitors coming from nearby areas such as San Francisco and Napa. Finally, 33% reported paying for local attractions including arts, entertainment, and sightseeing.

Source for all data: Sonoma County Airport Visitor Intercept Survey, 2015

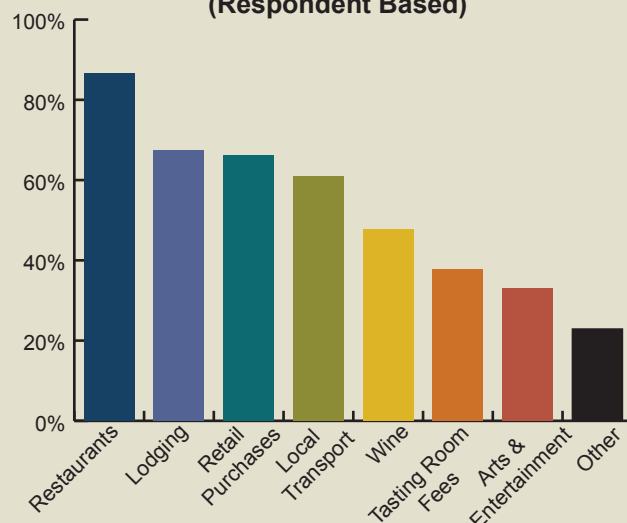
Primary Reason for Visiting
(Respondent Based)



Overnight Place of Stay
(Respondent Based)



Visitor Spending In-Market
(Respondent Based)



Annual Tourism Report

Current Issues

Short-Term Vacation Rentals

The short-term vacation rental market has changed dramatically in the past few years. In general, vacation rentals are classified as properties intended for permanent occupancy that are rented out for periods of 30 days or less. In Sonoma County, many of these vacation rentals are operated by professionals who manage multiple properties under a single TOT certificate.

However, an increasing number of individual owner-operated short-term rentals are appearing in Sonoma County, and are being promoted through travel websites such as VRBO.com and Airbnb.com. Within these sites, individual owners are able to solicit travelers by listing their properties as either entire-home or private room rentals, despite not being registered for TOT collection within Sonoma County.

In response to this growing issue, the Sonoma County Auditor Treasure Tax Controller conducted an internal audit of the county's vacation owner-operator population in 2014, in order to identify the number of unregistered short term vacation rental properties.

After cross-referencing the county's registered TOT vacation rentals against those listed for Sonoma County on Airbnb.com, the audit revealed that a total of 404 properties advertised on the website fell within the borders of Sonoma County, with approximately 267 located within unincorporated areas. Looking at the properties in the unincorporated areas, it was determined that at least 54% were not registered on the county's TOT database--revealing an estimated non-filing tax gap between \$500,000 to \$1.3 million.

The Thriving Communities and Sharing Economy Act

Earlier this year, California Senator Mike McGuire (D-2nd district) introduced Senate Bill 593, which aims to implement greater regulation on vacation rental properties in the state. Titled the "Thriving Communities and Sharing Economies Act", the bill would require online vacation rental businesses to disclose information about their listed properties to city and county jurisdictions, including addresses of host rentals, number of nights rented, and amount paid by visitors. Additionally, the bill would prohibit such businesses from facilitating any residential rentals that violate local ordinances.

If SB 593 is passed, the legislation would have a significant impact on websites such as Airbnb.com and VRBO.com, by requiring them to cooperate with city and county TOT collection efforts. Currently, the bill is awaiting a vote from the CA Senate.

Regulatory Responses in Other Regions

San Francisco

Recently, San Francisco enacted a law to legalize short-term rentals in the city. The law, which took effect February 1st, 2015, ends San Francisco's longstanding ban on residential rentals of less than 30 days in multi-unit buildings. However, the law imposes a number of restrictions on short-term rentals. Most importantly, rentals must be from permanent residents that have obtained permits from the city planning department to engage in short-term renting. The law specifies that short-term rentals cannot extend past an annual total of 90 days per year, and renters must pay San Francisco's 14% hotel tax. Additionally, online listing websites such as Airbnb are obligated under the ordinance to collect and remit payments for San Francisco's hotel tax.

Currently, San Francisco's Board of Supervisors has proposed amending the ordinance to cap all short-term rentals at 120 days a year, and to create and fund a new city office to register, investigate and enforce short term rental laws. As it stands now, the San Francisco Planning Department is tasked with enforcing the law. There are also efforts to include an amendment requiring online hosting sites, including Airbnb, to disclose addresses and total days rented on all listed properties. The Board of Supervisors will look to settle the proposed amendments in July of 2015.

Portland

In January of 2015, the City of Portland approved legislation to grant enforcement tools to the Portland Revenue Bureau to require Airbnb and other online short-term rental brokers to provide the names and addresses of all listed Portland hosts. The ordinance is designed to expand enforcement powers so that the Portland Revenue Bureau can better track permit registration and lodging tax collection.

As of February 2015, only 10% of an estimated 1,600 short-term rental hosts had submitted permit applications to the city of Portland, representing an ongoing challenge to enforce compliance with the new legislation.

Source: www.skift.com

Annual Tourism Report

2015 Tourism Industry Survey

Tourism Industry Survey: Results Summary

The 2015 Tourism Industry Survey is an annual survey of Sonoma County tourism businesses performed by the Sonoma County Economic Development Board (EDB). Surveys were sent to more than 1,000 Sonoma County business owners, executives and individuals involved in the tourism sector. More than 300 respondents representing local wineries, restaurants, lodging establishments, tours & transportation, spa & wellness services and tourism-related businesses responded to questions regarding economic outlook visitor and business demographics, and marketing strategies, representing a 30% response rate, a very strong rate for a mailed survey.

The source for all data in the following section is the 2015 Annual Tourism Survey

Key Findings

- Businesses have a positive outlook for tourism in the coming year. More tourism businesses feel optimistic about Sonoma County's tourism industry than reported in previous years, and more businesses expanded operations over the past year than in the year before.
- Most respondents believe that Sonoma County has a high potential to attract visitors overall; and the diversity of attractions and activities, Sonoma County's scenery and climate, and the county's culinary offerings are its greatest assets besides wine reputation/culture.
- The most commonly identified opportunities for Sonoma County tourism in niche markets were Culinary Tourism, Cycling, and Eco-tourism. Craft beverages were also increasingly reported as a niche market.
- Respondents feel local government agencies can make a positive difference in the tourism industry by assisting with licensing and permits and infrastructure improvement. Promotion agencies can best assist respondent businesses through marketing, PR and media visits, and tourist industry trend reports. The majority of respondents feel that countywide and regional marketing initiatives are effective in promoting Sonoma County.

Annual Tourism Report

Survey Respondent Demographics

Owners and executives of more than 150 diverse tourism businesses responded to the EDB's 2014 Tourism Industry Survey. The following graphs outline the types of businesses that responded to our survey. Please note: respondents were asked to classify their own business/ operations type.

Tourism Industry Businesses

'Lodging' and 'Winery' were the most common primary operations of responding businesses at 26% and 25%, respectively. The lodging classification of respondents is broken down further below. Businesses that classified themselves as 'other' include art galleries, museums, visitor centers and retail shops. Other respondents included businesses whose primary operations were 'tour and transportation service or support' (7.7%), 'restaurant' (14.5%), 'recreation service provider or outfitter' (4.3%), and 'spa and wellness' (3.8%). The surveyed businesses reflect the diverse strength of Sonoma County's tourism industry.

LODGING CLASSIFICATIONS

1. Full Service Lodging

Properties offering a full range of on-premises food and beverage service, cocktail lounge, entertainment, conference facilities, shops and recreational activities provided by uniformed staff on duty 24 hours. Of 'lodging' respondents, 17% indicated they were classified as full service.

2. Vacation Rentals

These properties are fully-furnished condominiums, town homes or single family homes - featuring amenities such as games, beach equipment, DVD libraries, and a stocked kitchen. These properties are rented on a temporary basis to tourists as an alternative to a hotel. Of 'lodging' respondents, 24% indicated they were classified as vacation rentals.

3. Bed & Breakfast

Smaller establishments emphasizing a more personal relationship between operators and guests. Guest units tend to be individually decorated. Rooms may not include some modern amenities and may have a shared bathroom. They are usually owner-operated. A continental or full hot breakfast is included in the room rate. Of 'lodging' respondents, 30% indicated they were classified as bed & breakfasts.

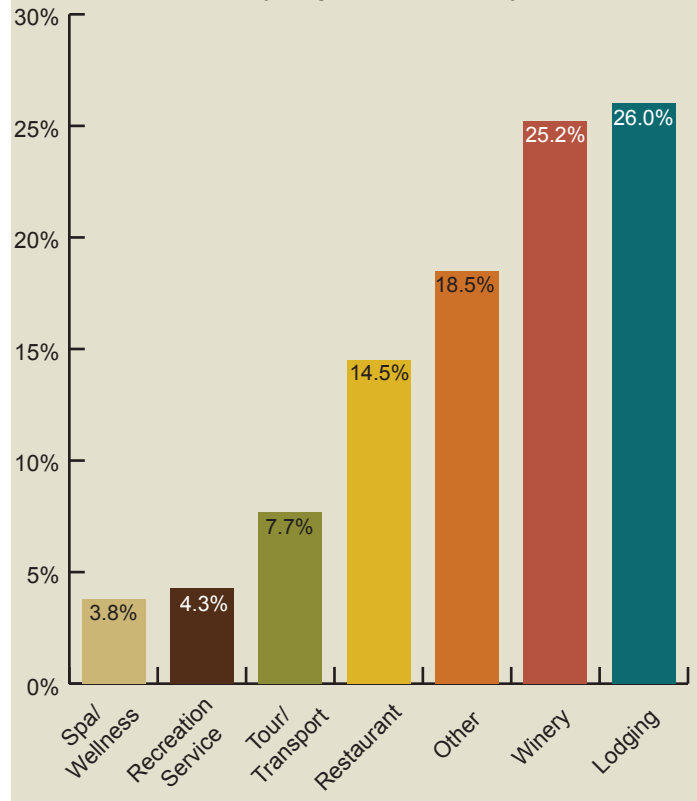
4. Limited Service Lodging

Only the basic services and facilities are available and self-service aspects are predominate for limited service lodging. Commonly, a continental breakfast may be offered rather than having a restaurant on premises. Of 'lodging' respondents, 21% indicated they were classified as limited service.

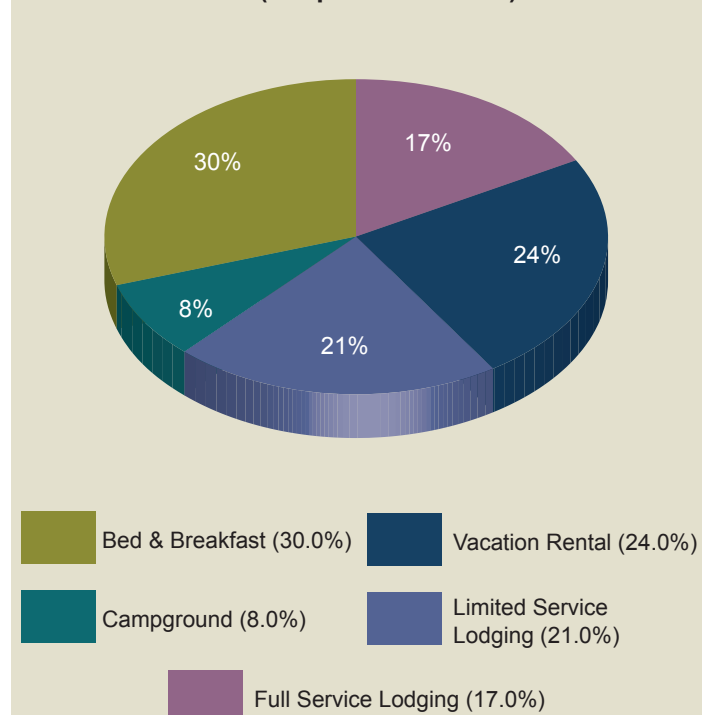
5. Campground

A place useful for overnight stay in the outdoors, where an individual, family or group may camp. Consists of open pieces of ground where a camper can pitch a tent or park an RV. Some campsites have amenities including fire pits, picnic tables, utility hookups, shower facilities, and more. Of 'lodging' respondents, 8% indicated they were classified as campground.

Primary Operations of Tourism Industry Business, 2015 (Respondent Based)



Demographic Profile of Lodging Properties, 2015 (Respondent Based)



Annual Tourism Report: Industry Survey

Survey Respondent Demographics (cont.)

From responses given, local tourism industry businesses may be described as independent, long-established and relatively small. The following graphs outline more details about the characteristics of Sonoma County's tourism businesses.

Number of Years in Business

The majority of respondents indicated they have been in business for more than 20 years (39%). Another 21% of the respondents have been in business for more than 11 years and 14% indicated they have been in business for 6-10 years. Finally, an increasing number of businesses have opened in the last five years than are 0-5 years old (27%). This suggests that there is continued business growth, and that the tourism business is maturing and stabilizing in Sonoma County.

Independently Owned in Sonoma County

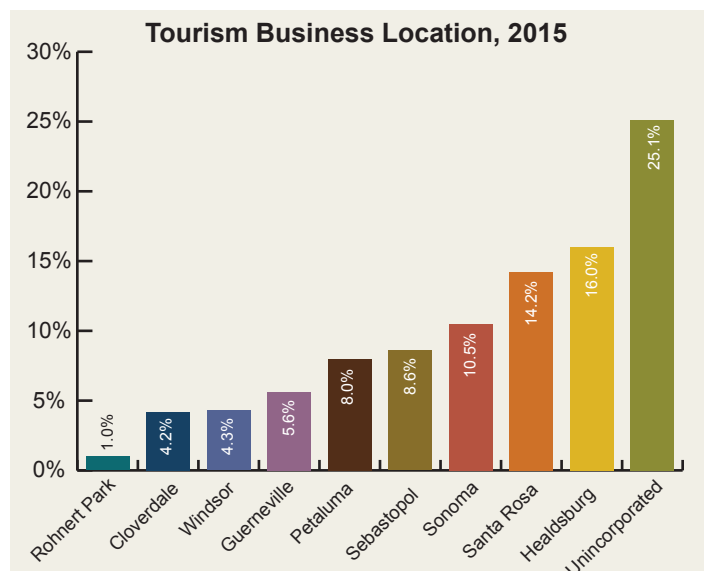
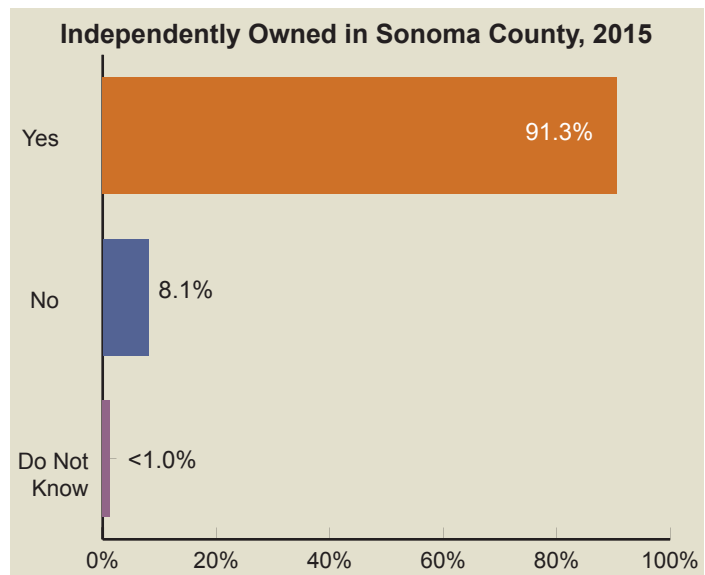
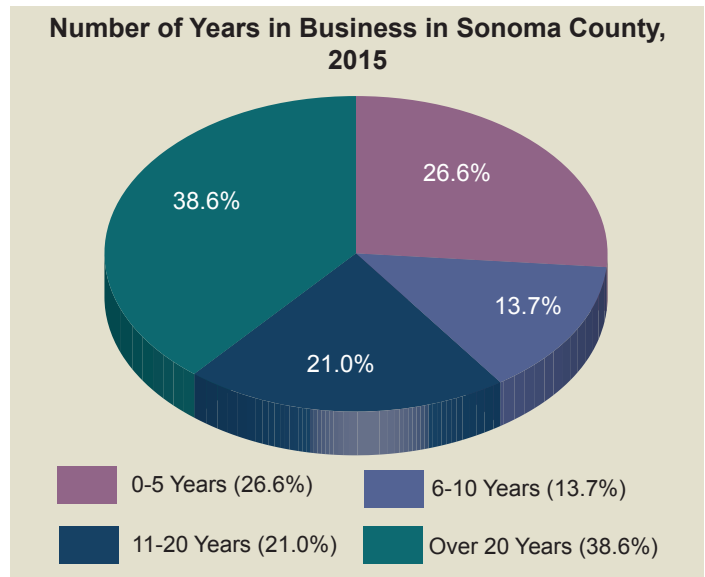
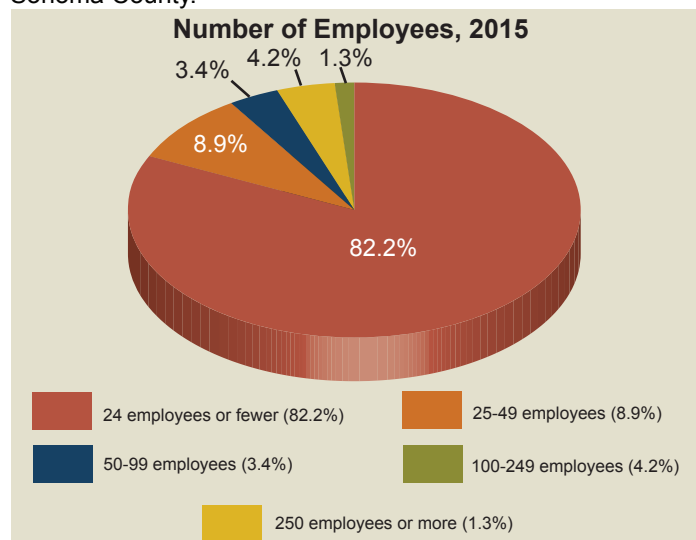
A significant percentage of businesses surveyed indicated that they are independently owned in Sonoma County (91%). Of those that are independently owned in Sonoma County, 2% indicated that they were a franchise.

Tourism Business Location

The majority of Sonoma County's tourism-related businesses that responded are located in unincorporated county (25%), Healdsburg (16%), and Santa Rosa (14%). Other areas of the county represented by respondents include the coastal cities of Bodega Bay, Jenner and the Sea Ranch, as well as smaller towns within Sonoma County.

Number of Employees

The majority of tourism businesses surveyed in Sonoma County employ 24 or fewer people (82.2%). On average, 47% of employees at businesses who employ 24 or fewer employees are part time or seasonal. There was a significant variance in the reported part-to-full time mix by all respondents, reflecting the diverse employment needs of different industries within Sonoma County.



Annual Tourism Report: Industry Survey

Industry Confidence & Outlook

Respondents were asked to indicate their perception about the tourism industry and whether they had expanded operations in the past year. Survey responses indicate that local tourism-related businesses are optimistic about the economy and travel industry.

Tourism Industry Outlook

More than 84% of the tourism-related businesses that responded to the survey indicated that they were 'optimistic' (47%) or 'somewhat optimistic' (37%) about the tourism portion of their business in the next year. This is roughly comparable to the percentage of respondents who were optimistic about the tourism industry last year. Less than 4% of respondents indicated that they were 'concerned' (0.4%) or 'somewhat concerned' (3.0%) with the tourism portion of their business over the next year.

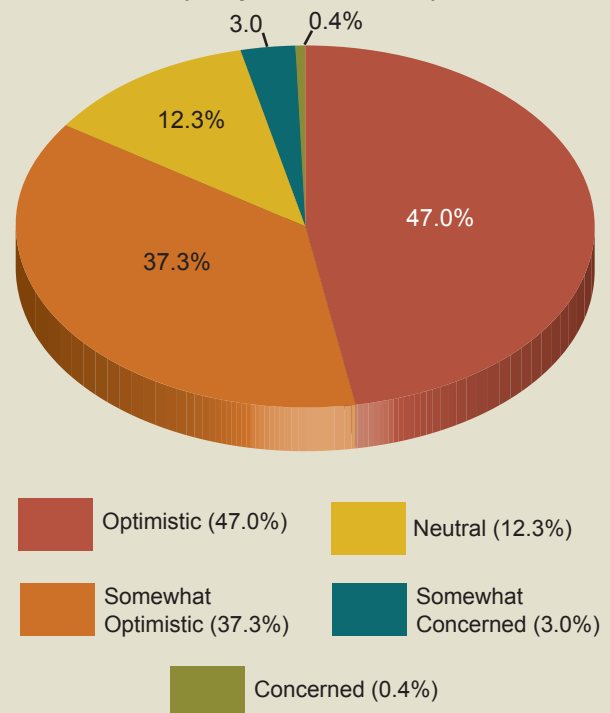
With industry optimism on the rise, this seems to have translated into the decision for businesses to expand their operations in the past year.

Operation Expansion over Last 12 Months

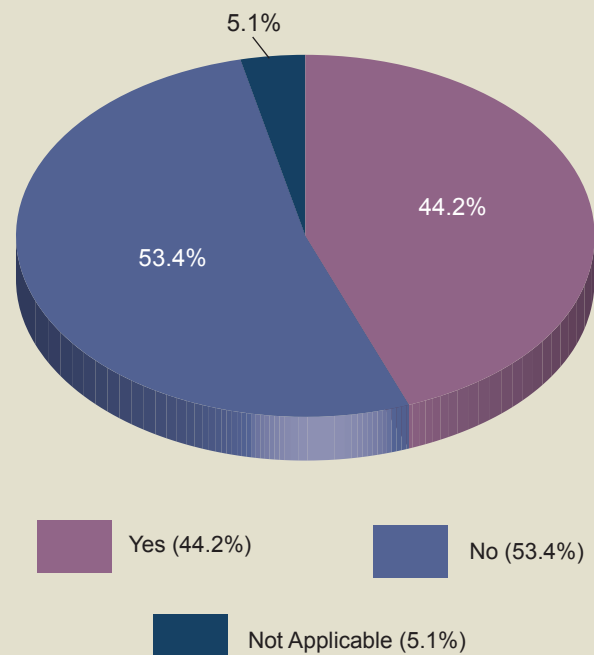
More tourism-related businesses are expanding their operations as tourism-spending returns to pre-recession levels. Of responding businesses, 44% indicated that they had expanded operations in the time between May 2014 and May 2015. Those that responded cited increased demand and traffic as the main drivers behind their growth. Conversely, the majority of businesses did not expand operations from May 2014 to May 2015 (53.4%).

As travel has continued to improve for Sonoma County, business outlook indicates that local tourism-related businesses are increasingly looking to expand, and are hopeful for sustained economic growth through the future.

**Sonoma County Tourism Industry Outlook, 2015
(Respondent Based)**



Percentage of Respondents that Expanded Operations over Last 12 months, 2015



Annual Tourism Report: Tourism Industry Indicators

Community Service & Charitable Giving

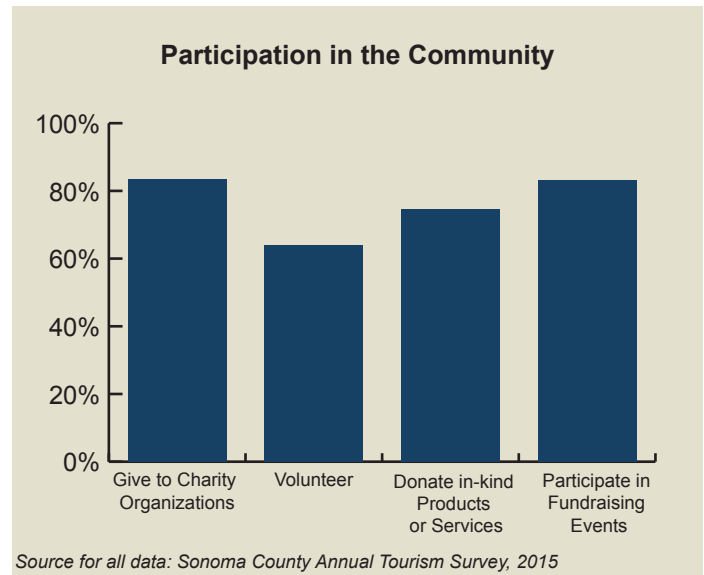
Involvement in community philanthropy is an important aspect for Sonoma County's tourism businesses. The majority of these businesses are involved in creating a positive community impact in one way or another.

Fundraising and Charity

Over 76% of the survey respondents reported that they participated in some form of charitable giving. Of these businesses, 84% give directly to charity organizations, 64% volunteer in the community, 75% participate in fundraising events, and over 83% donate in-kind product or services.

Support for Local Organizations

In addition to the volunteer efforts described above, Sonoma County tourism-related businesses support a number of local organizations dedicated to improving the surrounding community. While this list is not comprehensive, it gives an idea of the impact that these businesses have on Sonoma County in addition to the jobs they create.



Organizations that are Supported by Sonoma County Tourism Businesses

Boy's & Girls Club	Chefs of Tomorrow	Youth First
Occidental Center for the Arts	Santa Rosa Rotary Club	CERES
Redwood Arts Council	Sonoma Community Center	Face 2 Face
Living Room	Sebastiani Theatre	Girl Scouts
Russian Riverkeeper	Regional Fire Departments	KRCB Radio
Russian River Rotary Club	Redwood Empire Food Bank	Stewards of the Redwoods
Guerneville School Garden	Sebastopol Education Foundation	Mentor Me Petaluma

Annual Tourism Report: Industry Survey

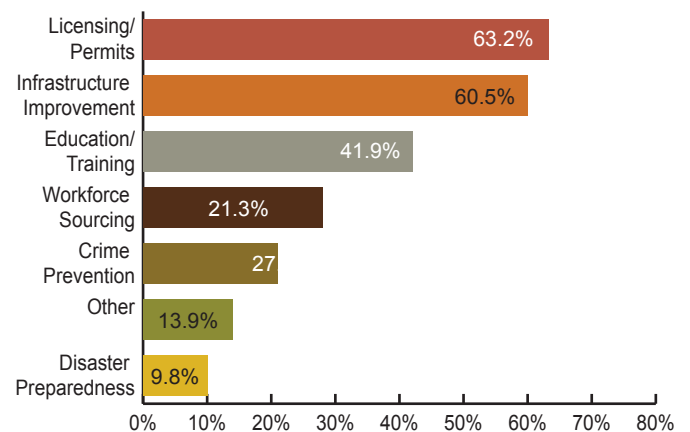
Marketing, Government & Promotional Assistance

Sonoma County's tourism industry is a diversified market of service-oriented businesses and segmented markets. The diversification results in a wide range of marketing channels and budgets to reach out to customers. There is also a variety of areas where tourism businesses feel they can be assisted by local government agencies and promotion agencies.

Potential for Local Government Assistance

Tourism-related businesses indicated that the largest potential for government assistance to their business is concerning licensing and permitting (63%), and infrastructure improvement (60%). Respondents also indicated that local government could help them with 'other' things which include destination marketing and parking issues.

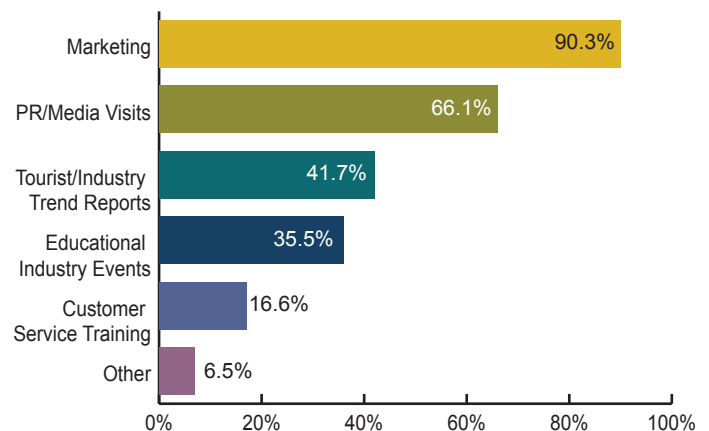
Potential for Local Government Assistance, 2015 (Respondent Based)



Potential for Local Promotion Agency Assistance

There is potential for local promotion agencies to help tourism-related businesses in several ways. 90% of respondents indicated that marketing would be helpful; 66% of respondents selected PR/ media visits; and 42% of respondents indicated they found trend reports useful.

Potential for Local Promotion Agency Assistance, 2015 (Respondent Based)



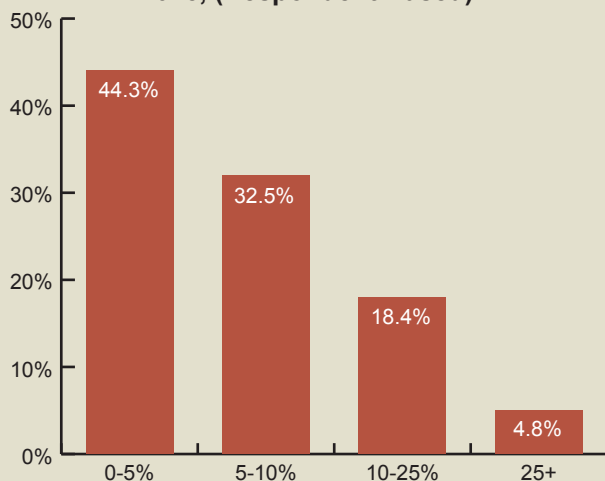
Marketing Tools Utilized by Tourism Businesses

The most widely used marketing tool among tourism businesses was a business website (91%), this was followed by social media (87%) and then by word of mouth (79%). The least used marketing outlets were television (3%), national magazines (11%) and radio (17.1%).

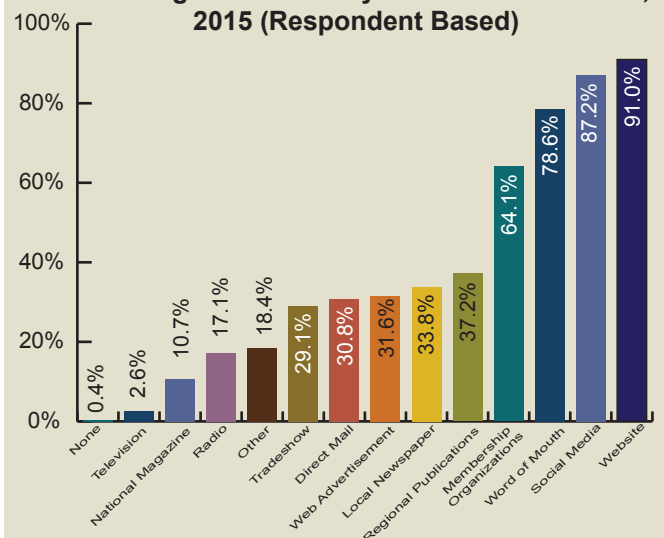
Percentage of Gross Revenue Spent on Marketing

The majority of tourism-related businesses spend between 0-5% (44%) and 5-10% (33%) of gross revenue on marketing efforts. More respondents indicated spending in the 0-10% brackets than in 2013, with fewer respondents indicating that they spend between 10-25% or more than 25% of their gross revenue on marketing.

Percentage of Gross Revenue Spent on Marketing, 2015, (Respondent Based)



Marketing Tools Used by Tourism Businesses, 2015 (Respondent Based)



Annual Tourism Report: Industry Survey

Attractions & Potential Market Opportunities

Tourism-related businesses were asked to indicate what tourism assets were most attractive to potential visitors to Sonoma County and in what markets there was room for growth. Please note: respondents were asked to identify which three niche markets they felt were the biggest opportunity for Sonoma County. As a result, the percentage in the corresponding graph indicates the number of times a niche market was selected as a 'top three'.

Potential for Attracting Visitors

85% of respondents felt that Sonoma County had a high potential to attract visitors. This was largely due to the diversity of services and attractions available to visitors and the climate and scenery. Of those who indicated otherwise, the largest concern was competition from Napa County and the Bay Area.

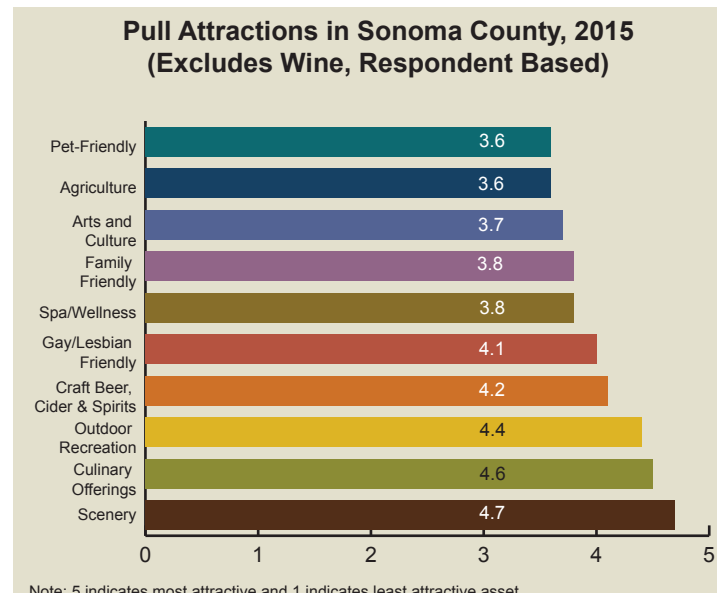
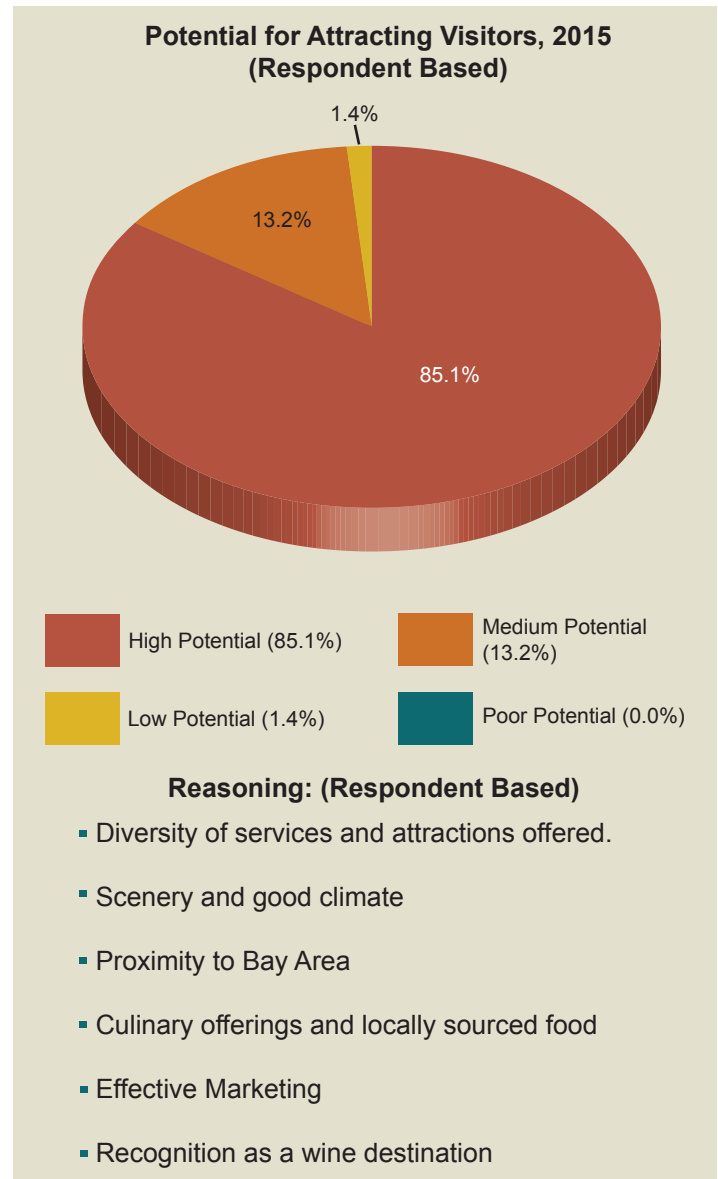
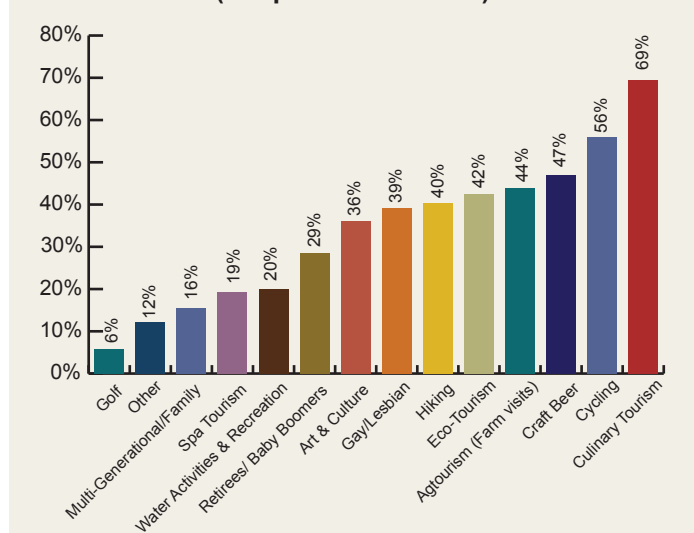
Pull Attraction in Sonoma County

Tourism-related businesses were asked to rank tourism assets on a scale from one to five, one for a least attractive asset and five for a most attractive asset. Respondents indicated that besides wine reputation, the most attractive assets to visitors are scenery (Average rating of 4.7), culinary offerings (4.6) and outdoor recreational activities (4.4). These top-three assets remain unchanged from 2014, although the score for each category increased. Another category to note with a strong score is the Craft Beer, Cider and Spirits industry (4).

Niche Market Opportunities for Sonoma County

Markets that tourism businesses felt would be good opportunities for Sonoma County were varied. The most reported niche market was culinary tourism (69%), followed by cycling (56%) and craft beer (47%). Respondents who indicated 'other' (12%) suggested more specific wine marketing and outdoor 'experiences'.

Niche Market Opportunities for Sonoma County, 2015 (Respondent - Based)



Annual Tourism Report: Industry Survey

Marketing Initiatives & Agency Involvement

Industry respondents cited many marketing opportunities to showcase Sonoma County's tourism assets. Responses indicate that there is more opportunity for businesses to collaborate with promotional agencies like Visitor Centers and Sonoma County Tourism.

Effectivity of Marketing Initiatives

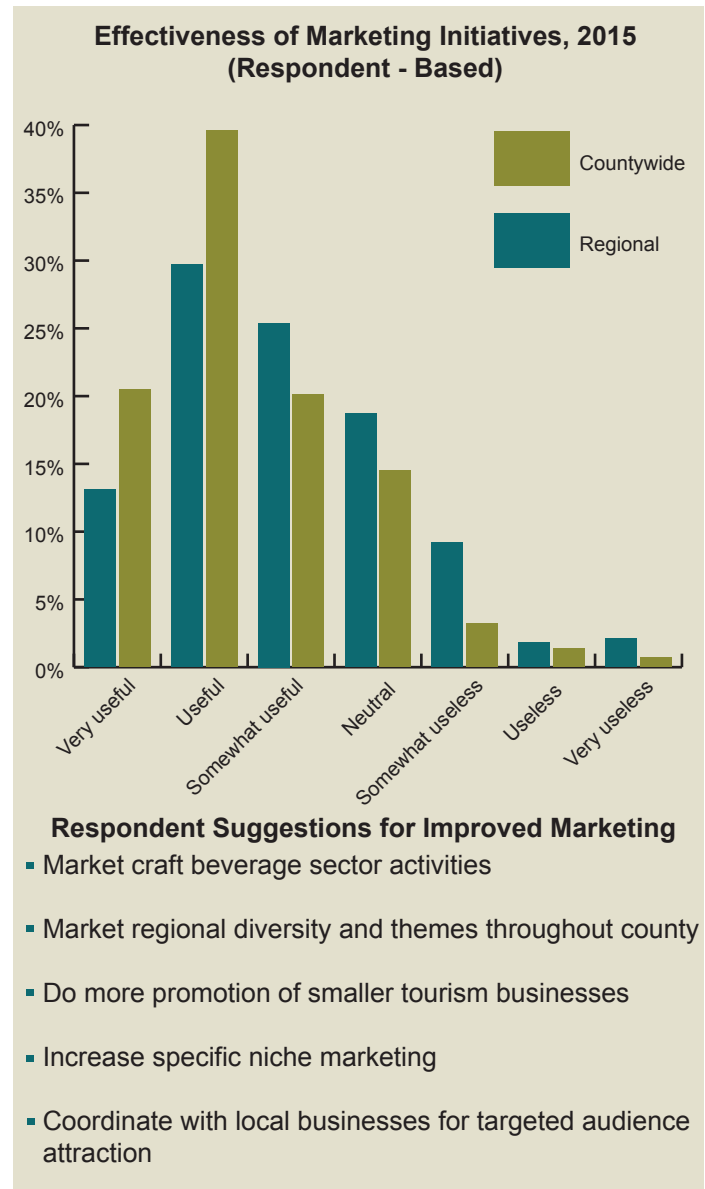
The majority of respondents indicated that tourism marketing initiatives were 'useful' for countywide marketing (40%) and 'useful' for regional marketing (30%). Very few respondents felt that regional or countywide marketing initiatives were 'somewhat useless' to 'very useless'. However, many respondents indicated suggestions to improve marketing. These included more region-specific marketing, more non-wine activity promotion, and expanding specific niche marketing.

Involvement with Sonoma County Tourism

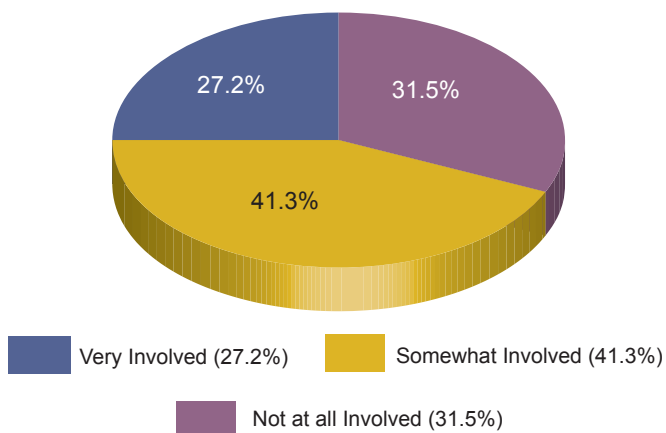
Respondents were asked to indicate how involved they were in working with Sonoma County Tourism (SCT). The majority indicated that they are 'somewhat involved' with Sonoma County Tourism (67%). Of those who worked with SCT, a larger percentage felt that regional and countywide marketing initiatives were 'useful' than 'somewhat useless' to 'very useless'.

Involvement with Sonoma County Visitors Centers

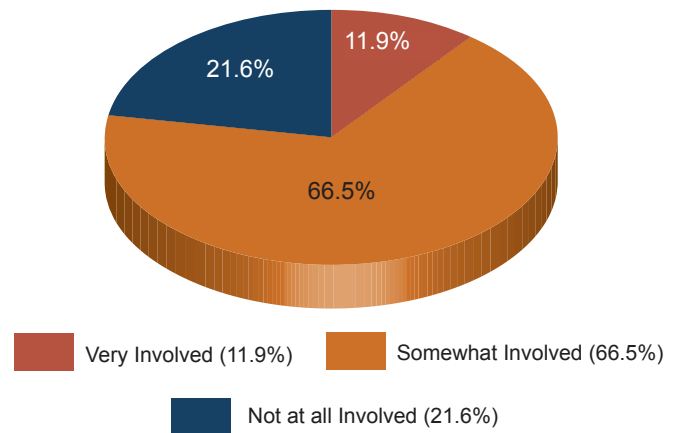
Respondents were also asked to indicate whether they worked with a local Sonoma County visitor center. The majority of respondents indicated that they were 'somewhat involved' in working with Sonoma County Visitor Center (41%). Of those that were not working with a Visitor Center, the majority still felt that the regional and countywide marketing efforts were 'useful'.



Involvement with a Sonoma County Visitor Center, 2015 (Respondent Based)



Involvement with Sonoma County Tourism, 2015 (Respondent Based)



Methodology

The Sonoma County Economic Development Board (EDB) conducted its 2015 survey of Sonoma County tourism businesses in relation to the tourism industry. Owners and executives of more than 150 tourism businesses rated their confidence in the industry and identified changes and needs they expect at their businesses in the near future. The responses covered businesses in a broad range of tourism establishments. The survey asked tourism-centered businesses to respond to a broad array of questions about their market and marketing efforts, their visitor demographics, their expansion plans, the demographics of the industry, and their opinion on key county tourism policies. This report represents the findings from that survey as well as an analysis of those responses.

In addition to the survey responses, the Sonoma County 2015 Annual Tourism Report includes general background information for the tourism industry on a regional and national level. Statistics presented represent the most recently published data from the Travel Industry Association (TIA), www.tia.org, Smith Travel Research, the California Travel and Tourism Commission's California Travel Impacts by County, prepared by Dean Runyan & Associates and updated May 2014, www.visitcalifornia.com, and Moody's Analytics Tourism Analysis report. The EDB used the U.S. Bureau of Labor Statistics' Consumer Price Index to adjust some data for inflation, <http://www.bls.gov/>. Lodging classifications were defined by AAA, www.AAA.com. The EDB collected and compiled all TOT data from each Sonoma County jurisdiction.

Please note that all survey data contained in this report is based on the information self-reported by respondents, which was not factually verified by the EDB. The responses were then gathered into a database for analysis. Due to the fact that survey respondents may provide no responses to some questions, the category percentages indicated in the graphs for those questions may not add up to 100%. Where replies are mutually exclusive, percentages may be slightly off due to rounding. Where replies are not mutually exclusive, percentages may total more than 100%. As mentioned above, it was our intention to obtain averages that provide a general "snapshot" of various issues for the hospitality/tourism industry in Sonoma County. Accordingly, the data averages are not weighted by any factor or interest.

Acknowledgements

The 2015 Annual Tourism Report would not have been possible without the contributions of many individuals.

Most of the credit for this study belongs to the local businesses that participated in the survey. Their responses created the foundation upon which the tourism sector could be studied and analyzed.

Special acknowledgement is also due to Ken Fischang and Tim Zahner at Sonoma County Tourism for their invaluable suggestions and generous provision of statistical data on the tourism sector in Sonoma County.

Finally, Dominic Wiggam, Tourism Project Coordinator with the EDB, contributed a significant amount of time and effort to the report through surveying administration, compilation, and organization of the report, data, and survey findings. Dominic Wiggam updated and consolidated the data sources and statistics from previous years to create this comprehensive analysis, and deserves special thanks.

Ben Stone
Executive Director

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EXECUTIVE LEVEL

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Midstate Construction
NorBAR
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Vantreo Insurance
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MEDIA LEVEL

North Bay
Business Journal
NORTH SAN FRANCISCO BAY AREA: SONOMA, NAPA, AND MARIN COUNTIES



Sonoma County Board of Supervisors