

Annual Tourism Report

2013
SONOMA
COUNTY



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June 2013

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism, is pleased to bring you the 2013 Annual Tourism Report. The 2013 Annual Tourism Report contains two sections integrating findings on the local tourism industry. The first section of the report highlights key economic indicators produced by the California Travel & Tourism Commission and Smith Travel Research. The second section provides updated results of the EDB Annual Tourism Industry Survey.

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 returning to 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 have seen in the last decade. Travelers are returning to Sonoma County and supporting the local economy through spending.
- Lodging indicators and occupancy rates also increased in 2012. The 2012 data also suggests travel is returning to Sonoma County.

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

Annual Tourism Report

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, 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.

Santa Barbara 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 2011, Sonoma County destination spending, industry earnings and industry employment experienced a year-over increase from 2010 after adjusting for inflation. This follows an increase seen in 2010 over 2009. This suggests travel is slowly returning to Sonoma County following the economic downturn.
- In 2012, Sonoma County's year-over average daily rate (ADR) for lodging increased 1.3% when adjusted for inflation. This follows a 3.9% increase in 2011, further suggesting that travel is returning to Sonoma County.
- Sonoma County's Transient Occupancy Tax (TOT) receipts totaled \$23.9 million in 2012 after adjusting for inflation. This is the highest level of TOT receipts that Sonoma County has ever received.

Moody's Analytics Tourism Analysis

A strengthening U.S. recovery after the federal fiscal cliff is resolved and an improving outlook for the wine country bode well for Sonoma's visitor-dependent industries. Greater interest in the county's destinations is evident in increasing passenger traffic at Charles M. Schulz-Sonoma County Airport. Passenger traffic through the first eight months of 2012 increased 3% from a year earlier and was close to matching the airport's peak for the same time period in 2008.

Hotel occupancies in Sonoma have also increased in this year and are now at their highest peak since 2005, according to Smith Travel Research. Amid this strengthening outlook, a luxury 59-room hotel is being proposed in the historic Sonoma Plaza area.

Eduardo J. Martinez
Moody's Analytics

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 8.47% from \$1.36 billion in 2010 to \$1.47 billion in 2011.

Destination Spending

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, 2011 figures indicate that tourism is making a strong comeback in Sonoma County as well as in other destinations.

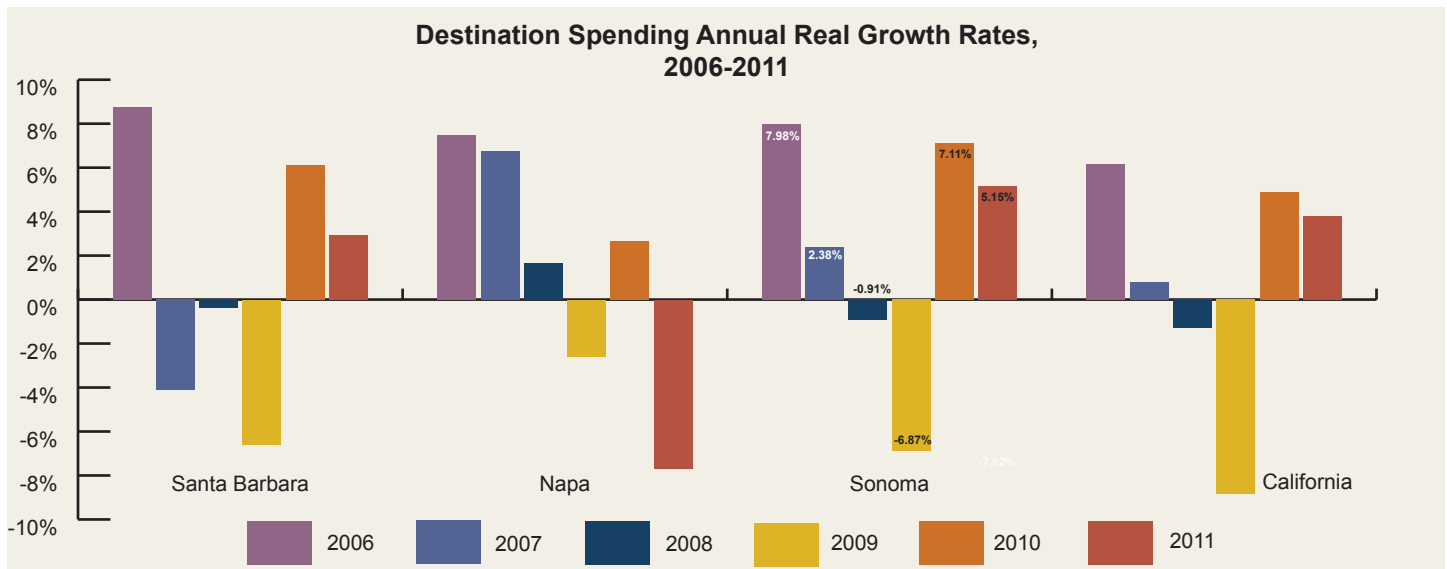
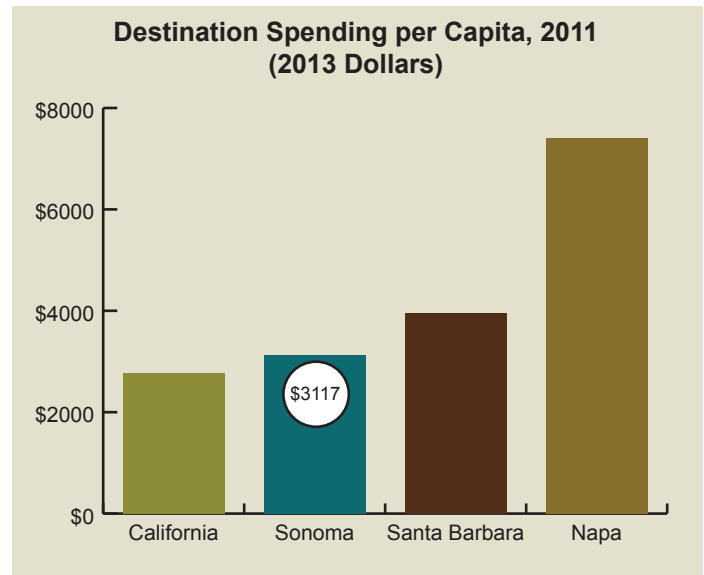
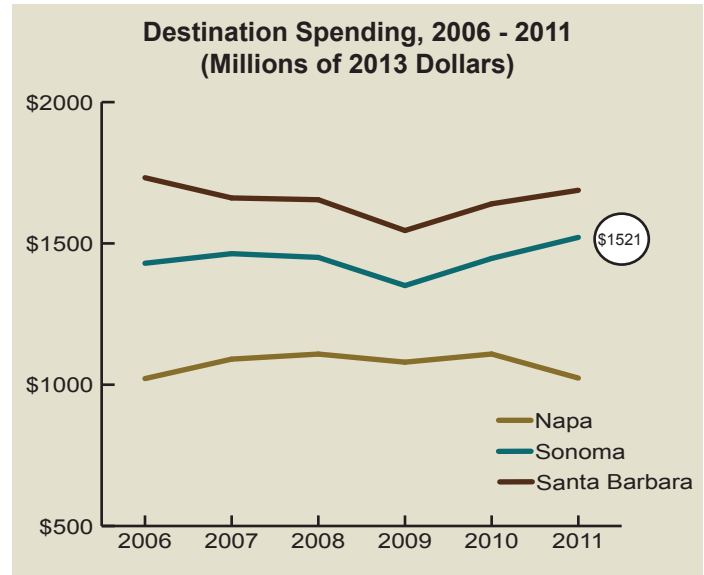
Destination Spending per Capita

For each of Sonoma County's 488,116 residents, \$3,117 dollars in destination spending were generated. Santa Barbara County, with a population of 426,878 generated \$3,955 per-capita and Napa County generated the highest per-capita spending at \$7,412. for each of its 138,088 residents. 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 and Santa Barbara Counties, but outpaced the statewide average of \$2,767 per capita.

Destination Spending Annual Real Growth Rates

The 5.15% increase in inflation-adjusted destination spending was a positive indicator for tourism in Sonoma County, following a 7.11% increase in the year prior. These increases indicate that direct spending is on track with pre-recession levels. This growth also outpaced that of Santa Barbara and Napa County and the California average for 2011. Early statewide 2012 figures indicate that this positive trend will continue .

Source for all data: California Travel Impacts by County, 2013



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

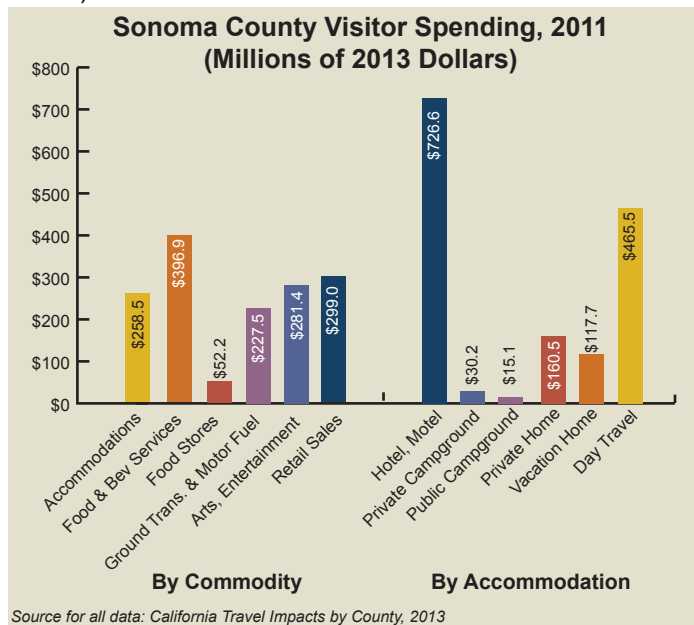
Visitors to Sonoma County devote a smaller share of their spending towards accommodations than other destinations - 17% of all spending, compared to 23.4% in Santa Barbara County and 25% in Napa County. Sonoma County visitors spend an approximately equal share of total spending on accommodations (17%), and arts, recreation and entertainment (19%). They spend the largest amount on food and beverage services (26.2%) and on retail sales (20%). Visitors to both Napa and Sonoma County spend more than the state average on arts, entertainment and 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 (48% compared to 67%, 64% and 55% for Napa County, Santa Barbara County and California, respectively). Instead, a significant share of Sonoma County visitor spending is received from day travelers (31%) compared to 26% for Napa, 24% for California and 22% for Santa Barbara County. A comparatively larger share of spending in Sonoma County comes from visitors who stay in vacation homes (8%) compared to 2% for Napa, 1% for California and 0% for Santa Barbara County.

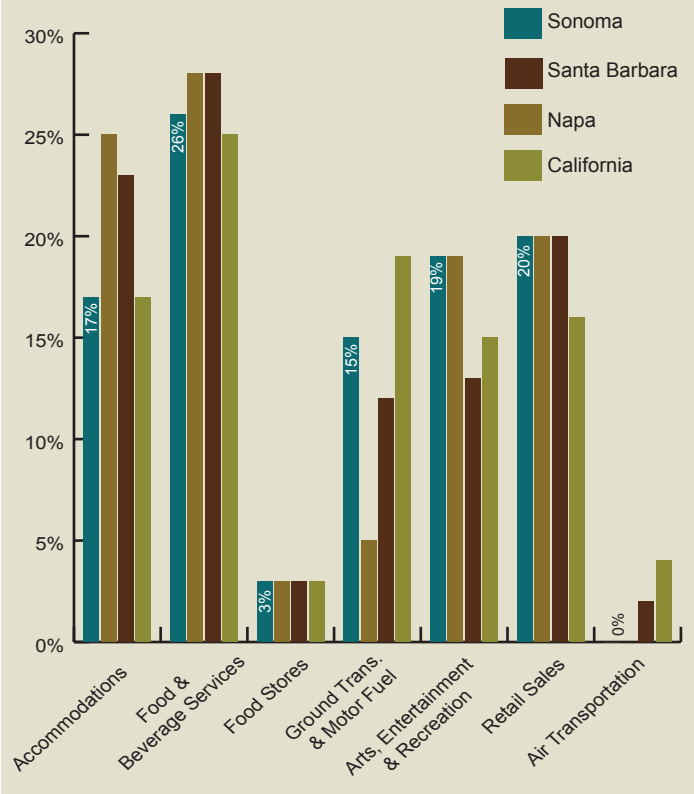
Sonoma County Visitor Spending

With a total visitor spending equal to \$1.47 billion, the majority of the money is spent by visitors who stay at hotels or motels (\$726.6 million) and on food and beverage services (\$396.9 million).

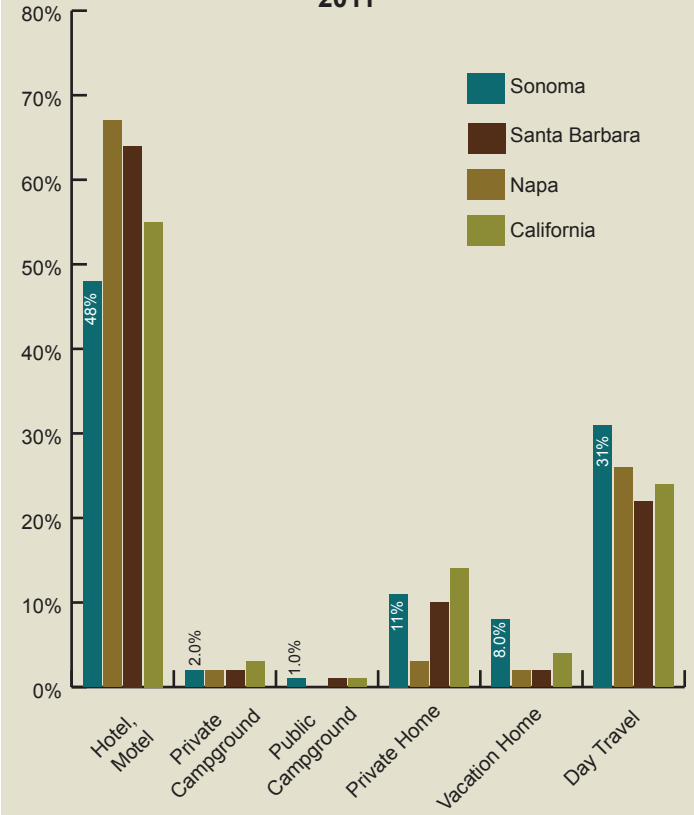


Source for all data: California Travel Impacts by County, 2013

Distribution of Visitor Spending by Commodity, 2011



Distribution of Visitor Spending by Accommodation, 2011



Annual Tourism Report: Tourism Industry Indicators

Industry Employment

With 16,910 jobs generated by tourist destination spending, Sonoma County ranks first against comparable counties - Napa had 11,350 tourism jobs and Santa Barbara had 16,300 tourism jobs in 2011. Sonoma County's 2011 job figures show a 2.6% increase from 2010, up from a year-over increase of 1.4% from 2009 to 2010.

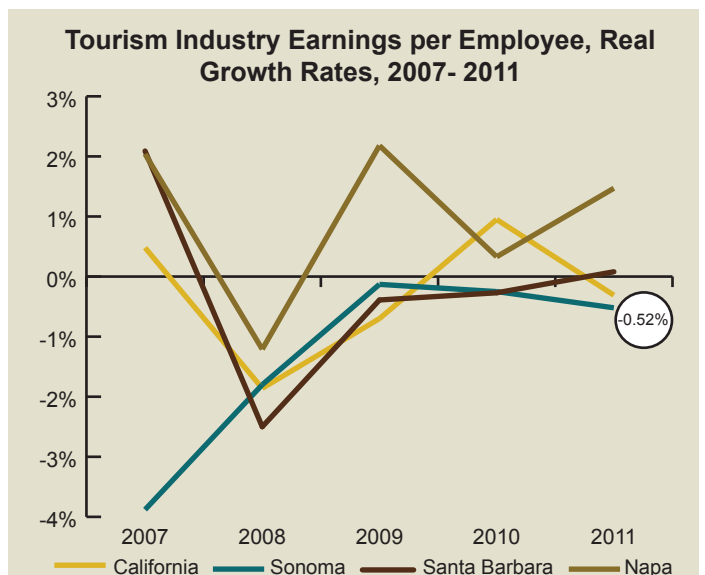
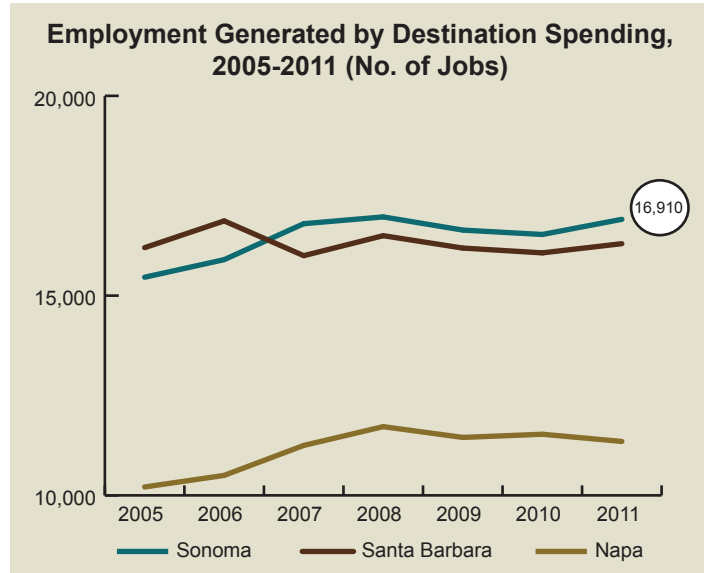
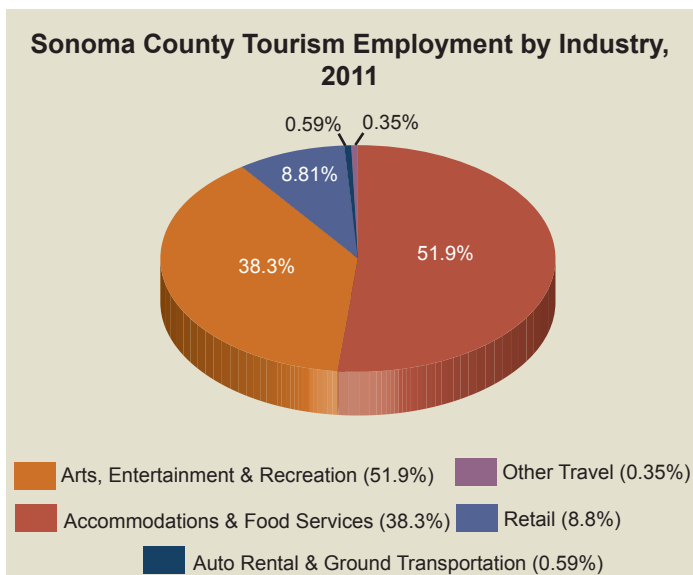
Tourism Industry Earnings per Employee, Real Growth Rates

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. Jobs supported by the tourism industry have almost returned to their peak level seen in 2007, with tourism-related job growth increasing by 2.3% in 2011. The county still employs more tourism industry employees than Napa and Santa Barbara, counties where total destination spending consistently outpaces that of Sonoma County. Due to discrepancies in growth between inflation-adjusted industry earnings (1.7%) and industry employment (2.3%), earnings-per-employee decreased 0.5% in 2011. California also experienced a decline in earnings-per-employee in 2011 (-0.3%), while Napa and Santa Barbara Counties experienced increased earnings-per-employee (1.4% and 0.1%, respectively).

Sonoma County Tourism Employment by Industry

Distribution of employment within Sonoma County's tourism industry is similar to previous years, with 51.9% of employment in accommodations & food services, 38.3% in arts, entertainment and recreation, and 8.8% in retail. In the coming years, air transportation is expected to be a new source of employment, due to the expansion of air services to Sonoma County.

Source for all data: California Travel Impact by County, 2013



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 \$726.6 million in spending in 2011 (2013 dollars). Lodging figures from 2012 suggest that travelers are returning to Sonoma County following the national economic downturn, indicating that we can expect to continue seeing growth 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. However, occupancy rates have been steadily increasing and the average for 2012 was 64%.

Annual Average Daily Rate (ADR)

Average daily rate (ADR) began to increase following the low seen in 2010 at \$101.90. Despite a 3.98% increase in 2011 and a 1.3% increase in 2012, Sonoma County's ADR still remains lower than the previous high of \$137.16 (2013 dollars) during 2007.

Revenue per Available Room

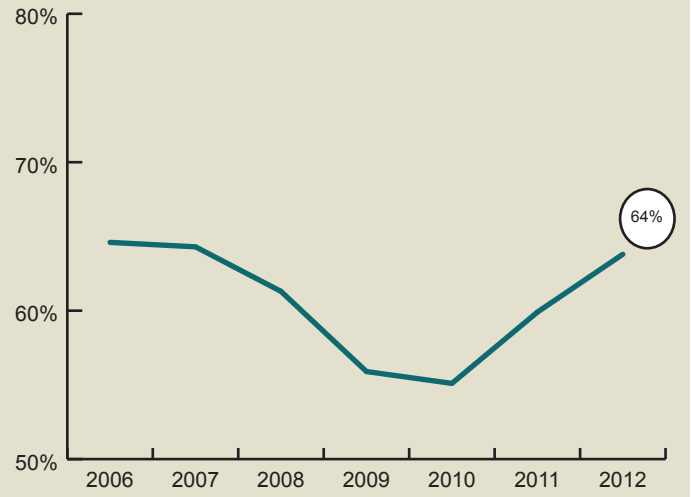
Revenue per available room (RevPAR) for Sonoma County have been increasing since 2010. While it has not reached the high levels of 2006 and 2007, RevPAR grew 7.9% from \$68.55 in 2011 to \$73.99 (2013 dollars) in 2012.

Real Growth Rates of RevPAR and ADR

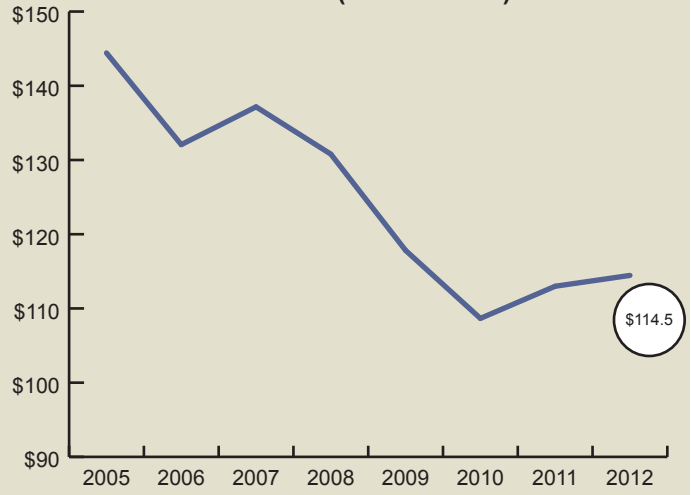
Revenue per available room and average daily rate have both increased from 2010 to 2012. As occupancy rates and average daily rate both increase, revenue per available room is expected to return to pre-recession levels.

Source for all data: Smith Travel Research, 2013

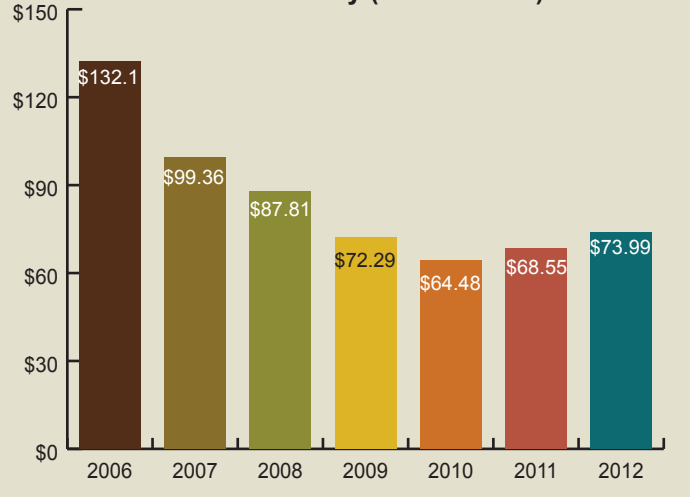
Annual Lodging Occupancy Rates, Sonoma County, 2006-2012



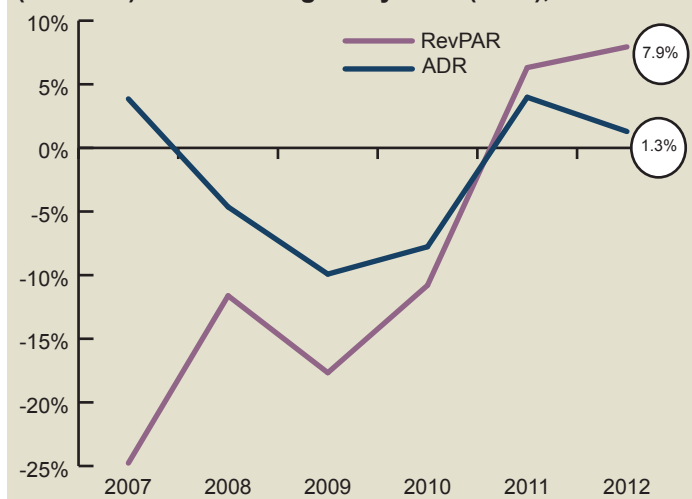
Annual Average Daily Rate (ADR), Sonoma County, 2006 - 2012 (2013 Dollars)



Revenue Per Available Room (RevPAR), Sonoma County (2013 Dollars)



Real Growth Rates of Revenue Per Available Room (RevPAR) & Annual Avg. Daily Rate (ADR), 2007-2012



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 6.9% to \$23.9 million in 2012 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 2012 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 (22.6%), tourism marketing (20.16%), or are transferred to the general fund in each city or area (25.3%).

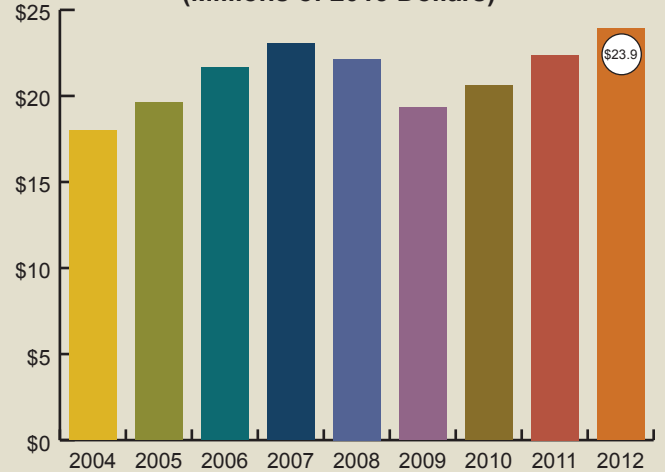
Tax Receipts Generated by Travel Spending

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 \$32.46 million in 2011, after adjusting for inflation. The state collected \$65.64 million from Sonoma County visitors in 2011, after adjusting for inflation. This is an increase from 2010 figures.

Percentage of Annual TOT Revenue by City

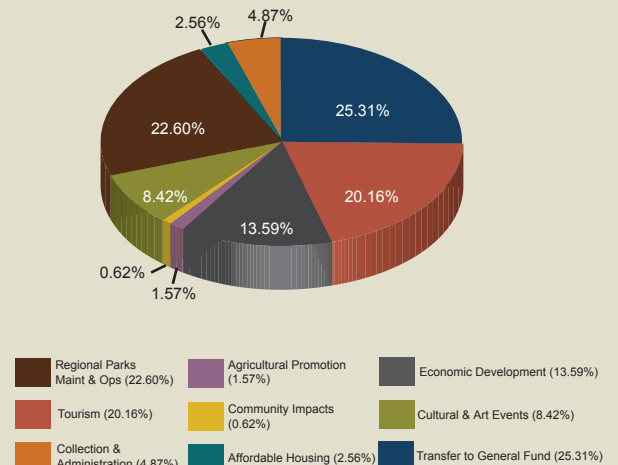
Revenues from TOT are divided between the County of Sonoma (which receives revenue from lodging properties in unincorporated regions) and the individual cities in the county. Collectively, the incorporated cities generated 60.5% of all revenue in 2012, while the unincorporated areas of the county generated 39.5%.

Annual TOT Collections, Sonoma County 2004-2012 (Millions of 2013 Dollars)



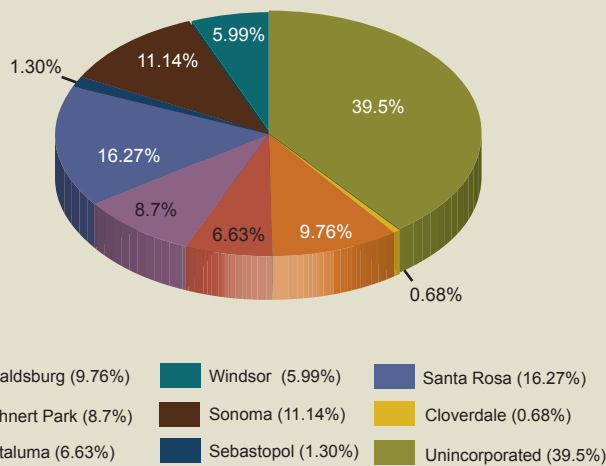
Source: Transient Occupancy Tax Reports, 2013

Fiscal Year 2012 - 2013 (July - June)
County of Sonoma TOT Budget Breakdown by Spending Area



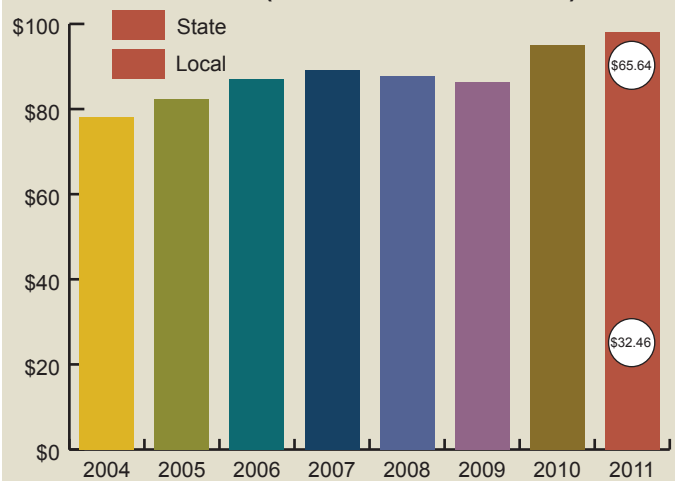
Source: Transient Occupancy Tax Reports, 2013

Percentage of Annual TOT Revenue by City, 2012



Source: Transient Occupancy Tax Reports, 2013

Tax Receipts Generated by Travel Spending, 2004-2011 (Millions of 2013 Dollars)



Source: California Travel Impacts by County, 2013

Annual Tourism Report

2013 Tourism Industry Survey

Tourism Industry Survey: Results Summary

The 2013 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 2,000 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 14% response rate, a strong rate for a mailed survey.

The source for all data in the following section is the 2013 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 Cycling, Eco-tourism and Gay/Lesbian.
- Respondents feel local government agencies can make a positive difference in the tourism industry by assisting with licensing and permits and infrastructure improvement. Local 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.

Survey Respondent Demographics

Owners and executives of more than 300 diverse tourism businesses responded to the EDB's 2013 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

'Other' and 'Lodging' were the most common primary operations of responding businesses at 29.5% and 28%, 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 'winery' (19.8%), 'tour and transportation service or support' (7.5%), 'restaurant' (7.5%), 'recreation service provider or outfitter' (4.1%), and 'spa and wellness' (3.7%). 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, 36.0% 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, 17.3% 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, 18.7% indicated they were classified as bed & breakfasts.

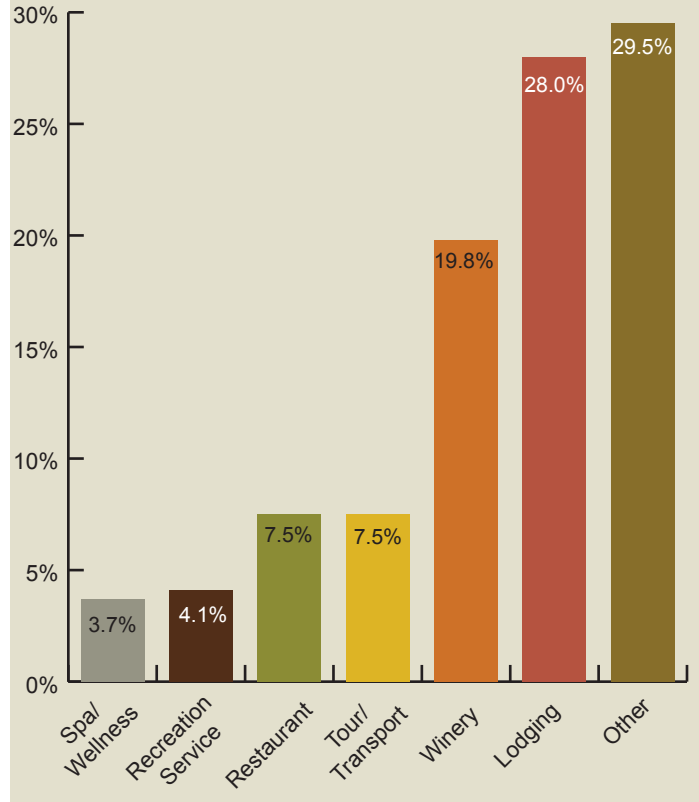
4. Limited Service Lodging

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, 17.3% indicated they were classified as limited service.

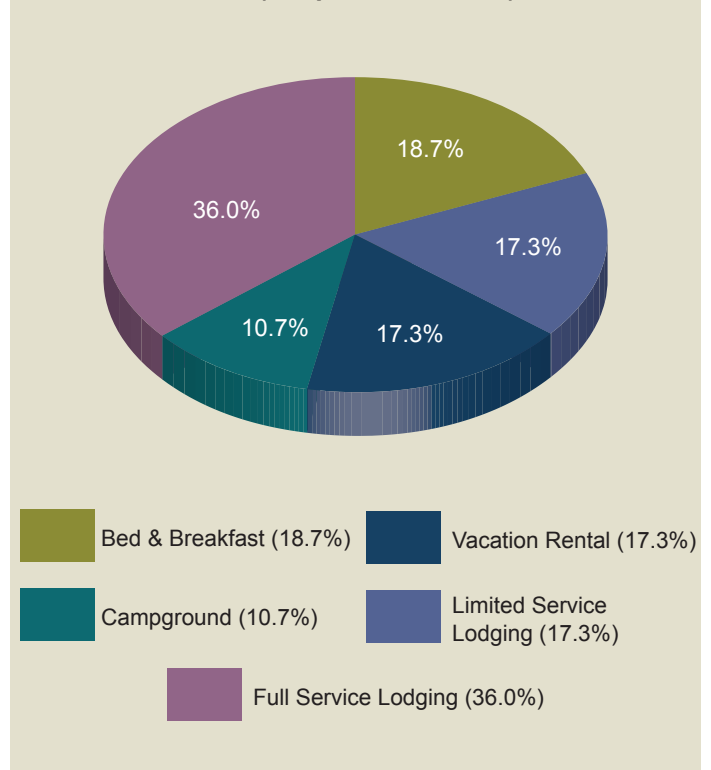
5. Campground

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, 10.7% indicated they were classified as campground.

Primary Operations of Tourism Industry Business, 2013 (Respondent Based)



Demographic Profile of Lodging Properties, 2013 (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 11 years. Almost half of the respondents have been in business for more than 20 years (48.8%) and 26.1% indicated they have been in business for 11-20 years. Almost equal numbers of businesses have either opened in the last 5 years (13.3%) or have been open for 6-10 years (11.8%). This suggests that there is room for growth, and that the tourism business is also sustainable in Sonoma County.

Independently Owned in Sonoma County

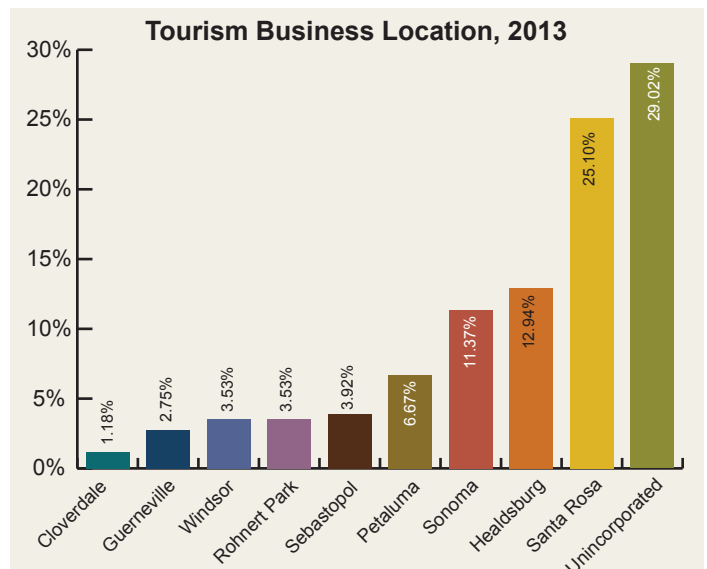
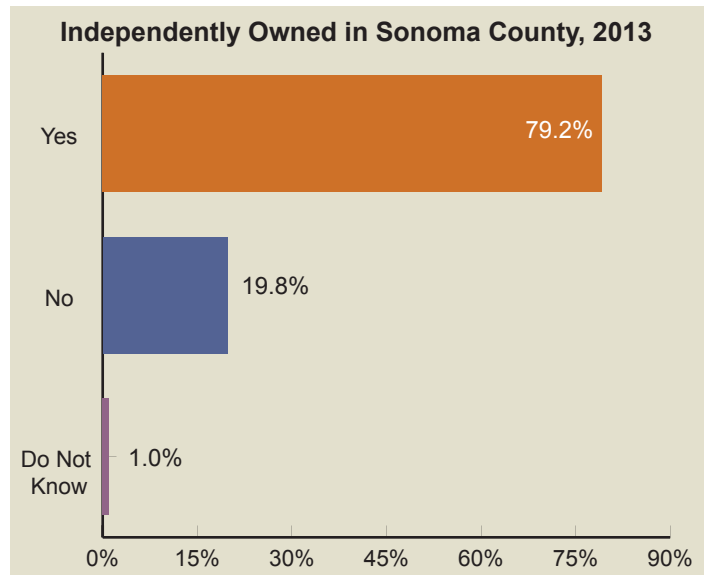
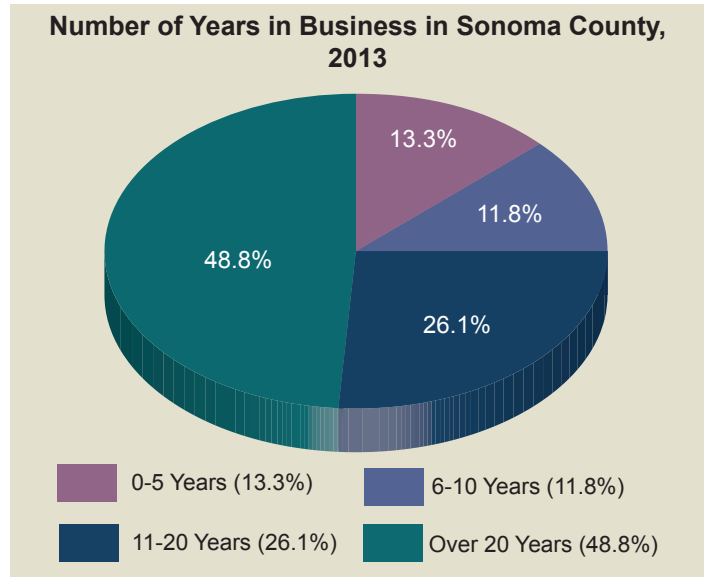
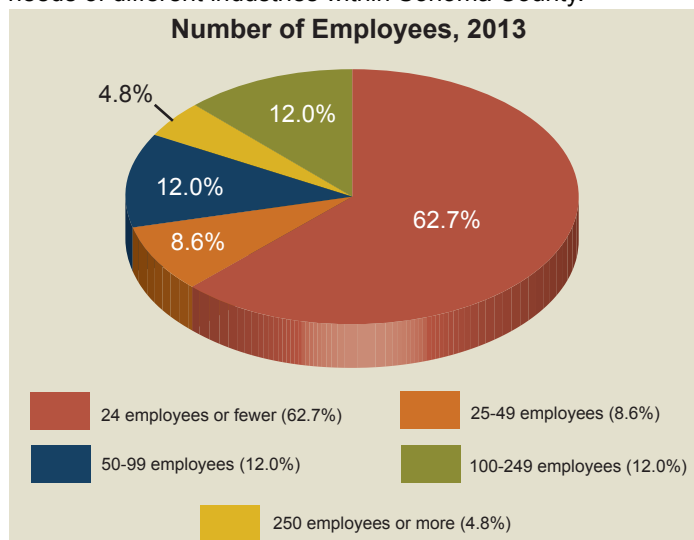
A significant percentage of businesses indicated that they are independently owned in Sonoma County (79.2%). Of those that are independently owned in Sonoma County, 5.6% indicated that they were a franchise.

Tourism Business Location

The majority of Sonoma County's tourism-related businesses that responded are located in unincorporated county (29.02%), Santa Rosa (25.10%), and Healdsburg (12.94%). 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 in Sonoma County employ 24 or fewer people (62.7%). On average, 50% of employees at business who employ 24 or fewer employees are part time. 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.



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 85% of the tourism-related businesses that responded to the survey indicated that they were 'optimistic' (44.8%) or 'somewhat optimistic' (41.9%) about the tourism portion of their business in the next year. This is an increase over the percentage of respondents who had some hope for the tourism industry last year. Less than 5% of respondents indicated that they were 'concerned' (0.5%) or 'somewhat concerned' (2.9%) with the tourism portion of their business over the next year.

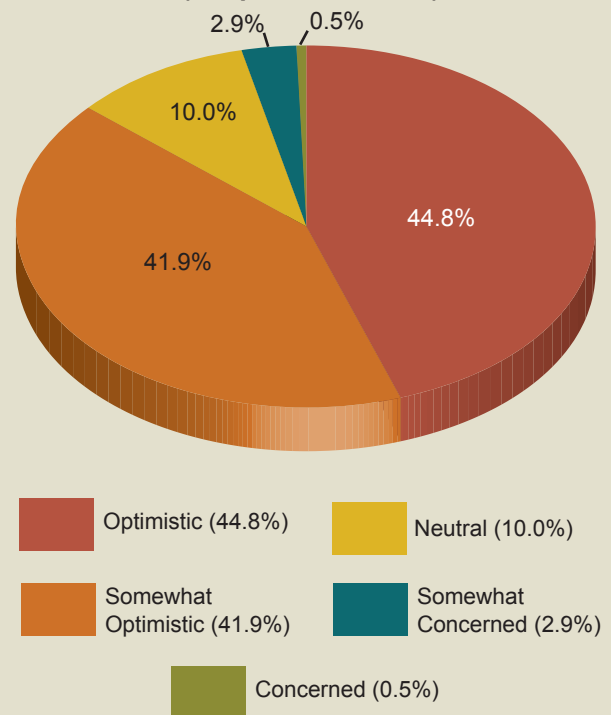
With industry optimism on the rise, this seems to have translated into the decision for businesses to expand their operations in the past year.

Operation Expansion over Last 12 Months

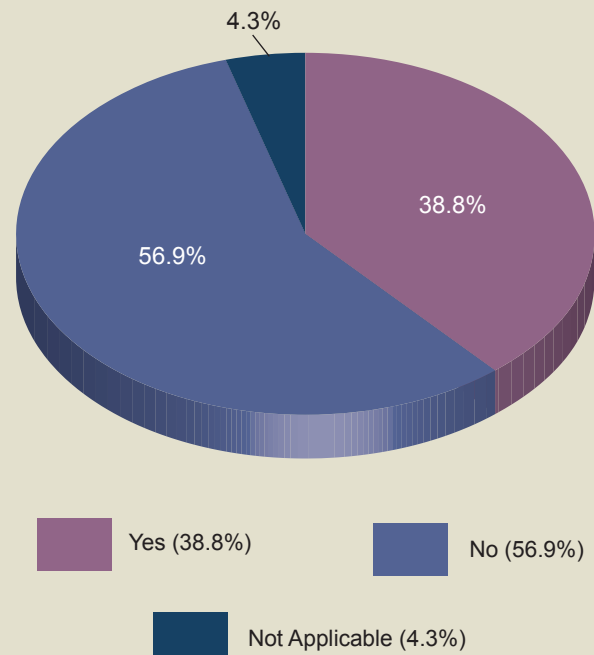
More tourism-related businesses are expanding their operations as tourism-spending returns to pre-recession levels. Of responding businesses, 38.8% indicated that they had expanded operations in the time between May 2012 and May 2013. Those that expanded indicated that they were already starting to see an increase in business and spending and were responding to new demand. The majority of businesses did not expand operations from May 2012 to May 2013 (56.9%). Those that did not expand indicated concern over the future of the general economy; citing issues over lack of economic resources such as financing, and not enough demand for their products.

Compared to the percentage of respondents that expanded over the same 2011-2012 time period, 57% more respondents indicated that they have expanded over the last 12 months. As the travel and tourism sector rebound in upcoming years coupled with increased optimism, it is likely that tourism businesses will continue to expand their operations.

**Sonoma County Tourism Industry Outlook, 2013
(Respondent Based)**



Percentage of Respondents that Expanded Operations over Last 12 months, 2013



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 (64.8%), and infrastructure improvement (59.9%). Respondents also indicated that local government could help them with 'other' things which include destination marketing and parking issues.

Potential for Local Promotion Agency Assistance

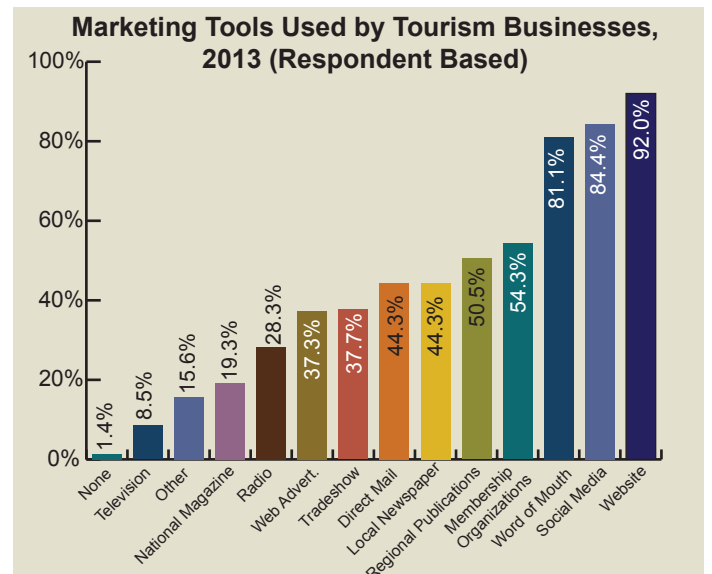
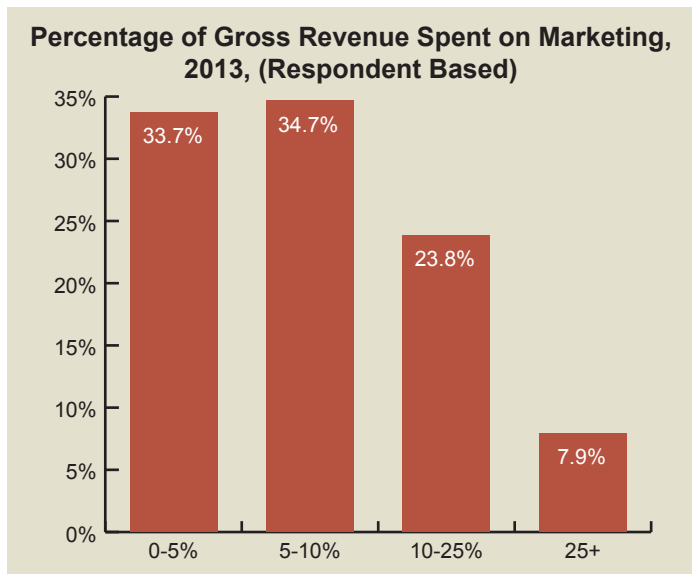
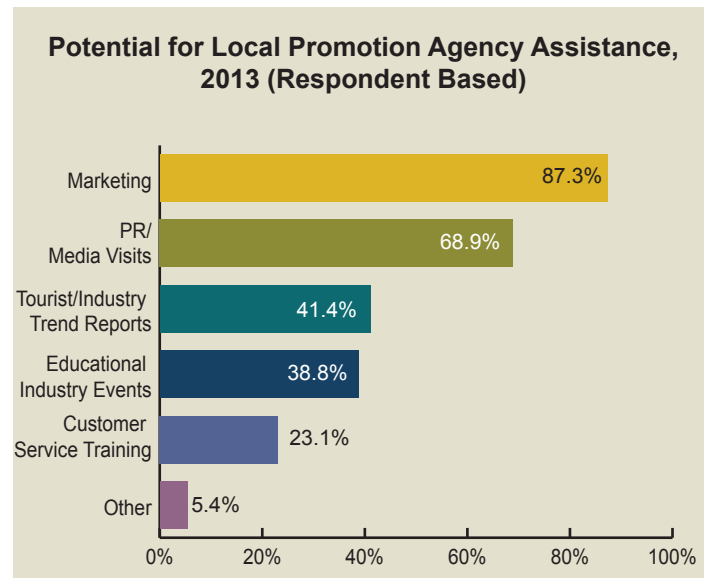
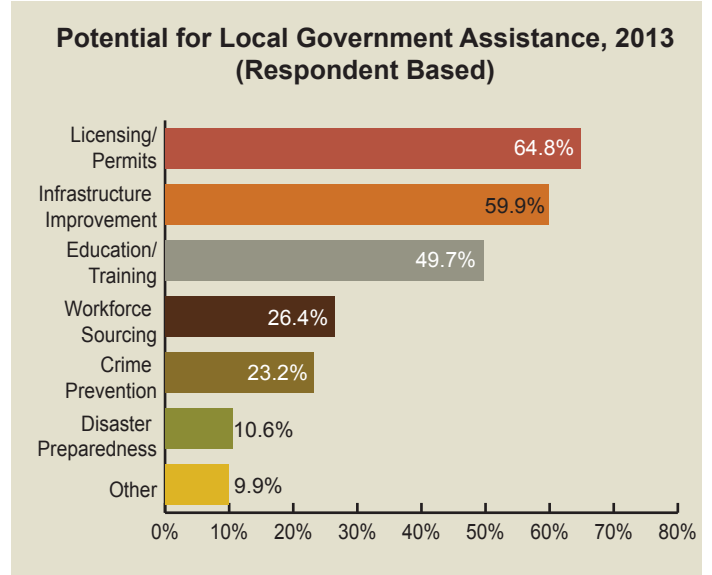
The potential for local promotion agencies to help tourism-related businesses exist in marketing (87.3%) and PR/ media visits (68.9%) and 41.4% of respondents indicated they found trend reports useful.

Marketing Tools Utilized by Tourism Businesses

The most widely used marketing tool among tourism businesses was a business website (92.0%), this was followed by social media (84.4%) and then by word of mouth (81.1%). The least used marketing outlets were television (8.5%), national magazines (19.3%) and radio (28.3%).

Percentage of Gross Revenue Spent on Marketing

The majority of tourism-related businesses spend between 0-5% (33.7%) and 5-10% (34.7%) of gross revenue on marketing efforts. Fewer respondents indicated spending in both brackets than in 2012, with more respondents indicating that they spend between 10-25% or more than 25% of their gross revenue on marketing.



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

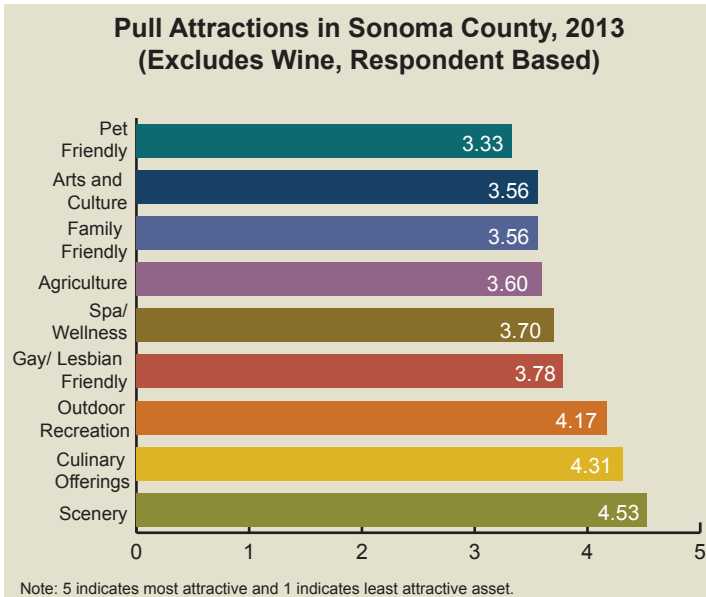
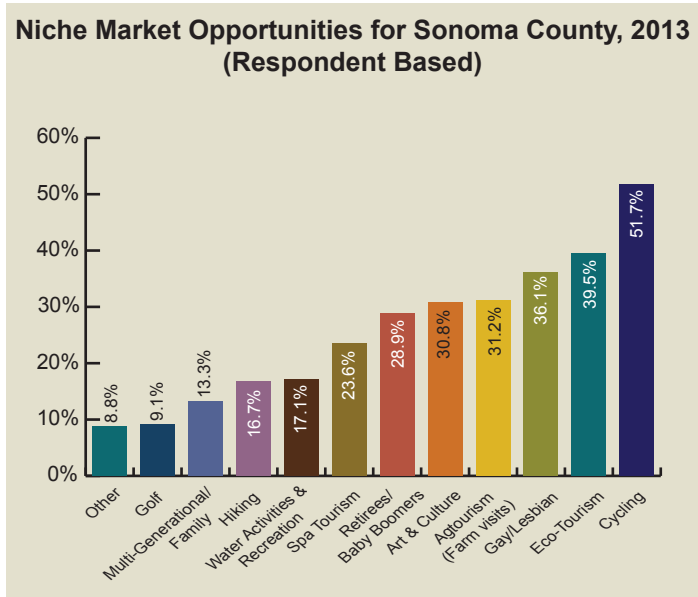
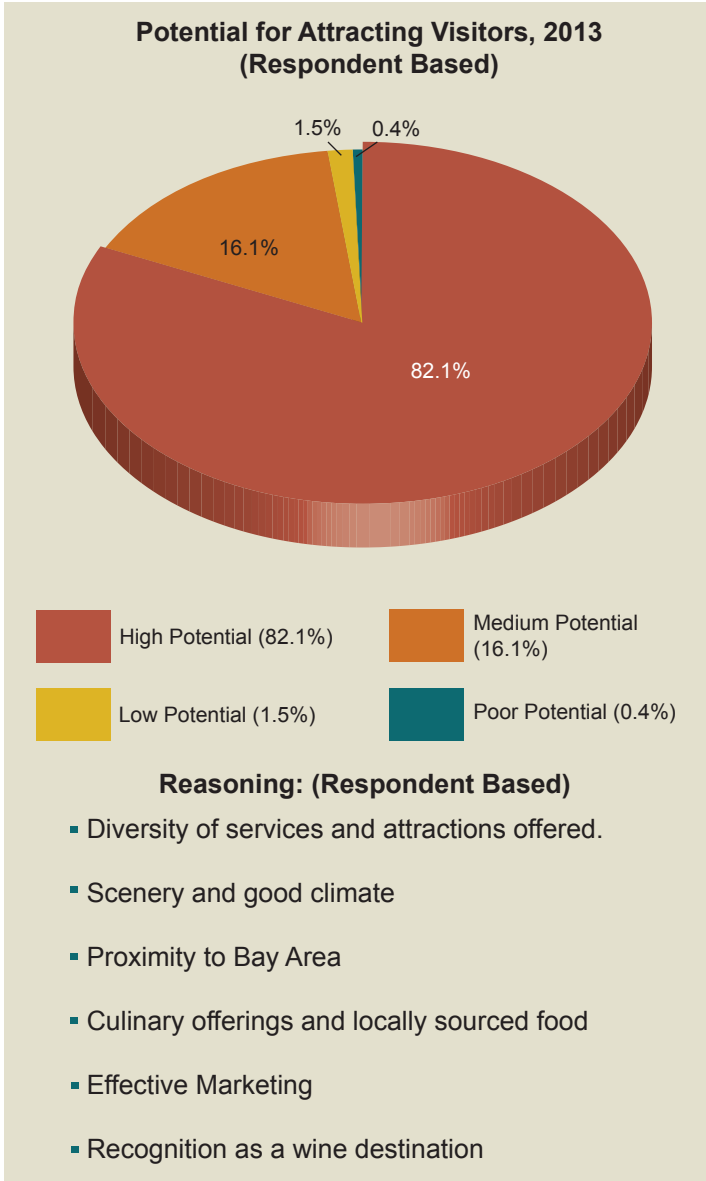
More than 80% of respondents felt that Sonoma County had a high potential to attract visitors (82.1%). This was largely due to the diversity of services and attractions available to visitors and the climate and scenery. Of those who indicated otherwise, the largest concern was competition from Napa County 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 4.53), culinary offerings (4.31) and outdoor recreational activities (4.17). These top-three assets remain unchanged from 2012, although the score for each category increased.

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 cycling (51.7%), followed by eco-tourism (39.5%) and gay/lesbian (36.1%). Respondents who indicated 'other' (8.8%) suggested culinary market and craft beer.



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 (39.6%) and 'useful' for regional marketing (34.9%). 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.

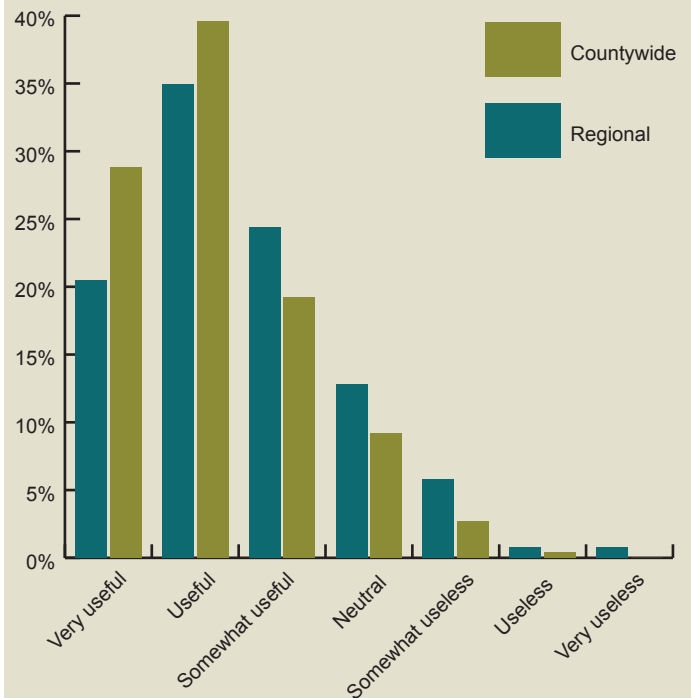
Involvement with Sonoma County Tourism

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 (62.1%). 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 Center

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 (51.4%). Of those that were not working with a Visitor Center, the majority still felt that the regional and countywide marketing efforts were 'useful'.

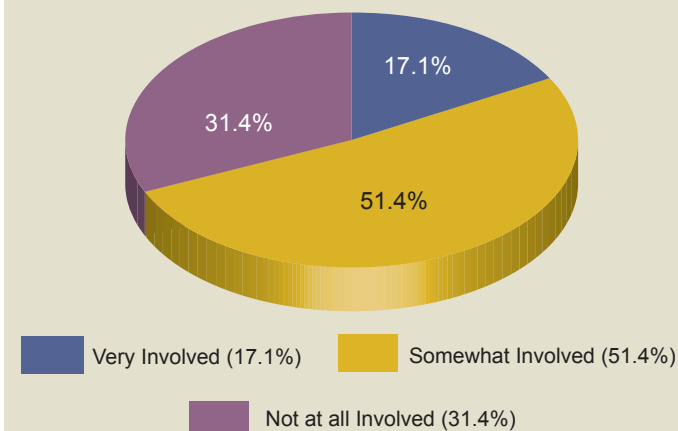
Effectivity of Marketing Initiatives, 2013 (Respondent Based)



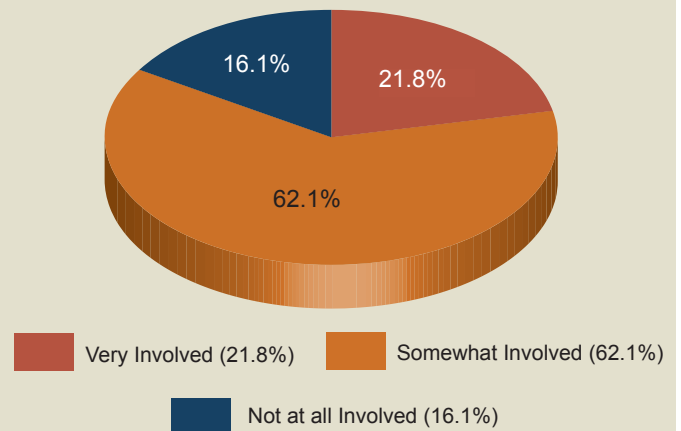
Suggestions for Improved Marketing, 2013

- Market non-wine activities
- Market specific regions and locations within the county more heavily
- Do more promotion of smaller tourism businesses
- Increase specific niche marketing
- More marketing promotions

Involvement with a Sonoma County Visitor Center, 2013 (Respondent Based)



Involvement with Sonoma County Tourism, 2013 (Respondent Based)



The Sonoma County Economic Development Board (EDB) conducted its 2013 survey of Sonoma County tourism businesses in relation to the tourism industry. Owners and executives of more than 300 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 2013 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, and the California Travel and Tourism Commission's California Travel Impacts by County, prepared by Dean Runyan & Associates and updated May 2013, www.visitcalifornia.com. 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 2013 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, Audrey Bendowski, 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. Audrey Bendowski updated and consolidated the data sources and statistics from previous years to create this comprehensive analysis, and deserves special thanks.

Ben Stone
Executive Director



With acknowledgement and appreciation to local key businesses supporting Sonoma County Economic Development:



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