



SONOMA COUNTY

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SONOMA COUNTY TOURISM ANNUAL REPORT FY 22-23





Dear Partners,

Fiscal year 2022 – 2023 was a successful one for the tourism and hospitality industry in Sonoma County. Overall revenue derived from tourism activities surpassed 2019, visitation reached pre-pandemic levels, and the celebration of truly emerging from the pandemic brought widespread optimism. This was clouded somewhat by pressures on the economy, skyrocketing inflation and surging interest rates for borrowers. But, pent-up demand and lingering hesitation about traveling abroad brought travelers back to Sonoma County. The Longwoods International Travels USA visitation study included at the back of this report provides a broad-based look at visitation in 2022.

Because of the greater than expected strength of the industry, led largely through the Transient Occupancy Tax (TOT), Sonoma County Tourism (SCT) realized funding it wasn't anticipating. Due to this, SCT was able to engage in programming on a scale that is generally beyond the organization's scope of work. In April, the TODAY show brought its third hour program, including all hosts, to Sonoma County for a live national broadcast. The visit also included the first-ever StartTODAY Wellness Retreat that showcased the area's appeal as a wellbeing destination. Not only was the destination given tremendous exposure, but we were delighted that so many small businesses were able to gain national recognition through this broadcast and the ancillary social media and in-person activations. Also that week, the CalSAE (California and Oregon Society of Association Executives) Elevate Conference came to Sonoma County. Through various events and travel to key points of interest, this influential group was able to experience the destination – meeting bookings have already resulted! And, the team was able to complete the Destination Stewardship and Resiliency Master Plan. This multi-year, multi-phased initiative will serve as the roadmap to the future of Sonoma County as a tourism destination.

The year also marked the organization's return to the international sales and media relations arena. With representation offices in the U.K., Germany and Australia, SCT made it clear that Sonoma County is ready to welcome international visitors. And, becoming a highly anticipated event, the industry recognized the 2022 Stars of the Industry showcasing tourism and hospitality employees who truly go above and beyond to create exceptional customer experiences.

These benchmark events were just a few of the many programs SCT initiated to help raise brand awareness and compel travel to the destination.

This annual report provides a detailed overview of the year. Herein, you'll find the financial reports, a programming synopsis and in-depth research materials within the appendices. We hope this will provide insights into SCT's programming, proficient business operations, stewardship of this destination and expanded business-building opportunities for partners all designed to boost revenue for area businesses and the County, and create compelling reasons for leisure and business travel to Sonoma County.

Don't hesitate to let me or anyone on the board or SCT staff know if you have any questions regarding the information provided in the report. Thank you for your great support and partnership!



Edward Roe
Chair, Sonoma County Tourism Board of Directors

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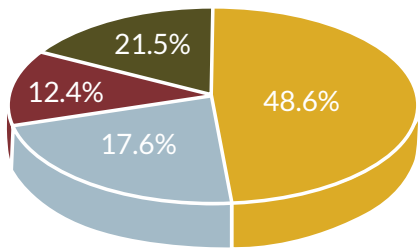
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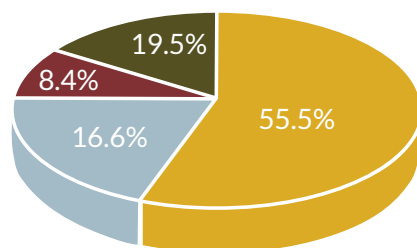
FINANCIAL REPORTS

The budget for fiscal year 2022-2023 was finalized in March 2022 and approved in April 2022. Revenues were based off conservative growth for the year assuming a year without any pandemic shutdowns or restrictions. The TOT revenue for fiscal year 2021-2022 was largely unknown at this time and the county performed much better than anticipated during that time frame. Revenue for the last 3 quarters of that fiscal year came in almost \$1,000,000 more than anticipated. This allowed us to adjust our expected spending levels for FY22-23 and add in extra programming that we felt could boost the county. We continue to reforecast our anticipated revenue and expenses each month to be able to pivot as quickly as possible based on market performance and needs within the county.

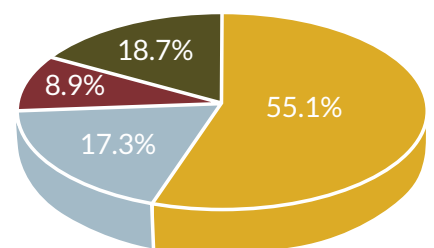
Fiscal year 2022-2023 started off strong in the summer but started to see some softening in the fall and over the winter. Poor weather conditions January to April hurt occupancy levels in the county and the re-opening of international destinations along with travel deals continued to slow occupancy throughout the spring. We were able to use our surplus funds from the prior year to add funding to our advertising campaigns for those need periods. In addition we used funds to sponsor the 3rd Hour of the Today Show to highlight the county in April. We had anticipated funding the Visitor Centers in FY22-23 which did not come to fruition so that money was shifted to other programming such as attending additional tradeshow, bringing in meeting planners for familiarization tours and sponsoring events being held both in Sonoma County to attract overnight guests and at events attended by meeting planners and tour operators to showcase what the county has to offer. We also used the additional funding to redesign our website and to continue to develop and add more features to our Sonoma County App. In fiscal year 2021-2022, we embarked on a Resiliency and Stewardship Master Plan and this was finalized in this fiscal year. Funding has been allocated in future years to work on the priorities that were identified in that Master Plan.



F22-23 Original Budget	
48.6% Marketing	\$4,829,957
21.5% Business Development	\$2,134,123
12.4% Community Engagement	\$1,231,086
17.6% Administration	\$1,752,402
	\$9,947,568



F22-23 Midyear Reforecast	
55.5% Marketing	\$6,489,012
19.5% Business Development	\$2,286,115
8.4% Community Engagement	\$975,656
16.6% Administration	\$1,944,446
	\$11,696,229



F22-23 Projected Results	
55.1% Marketing	\$5,866,654
18.7% Business Development	\$1,985,760
8.9% Community Engagement	\$950,516
17.3% Administration	\$1,841,030
	\$10,643,960

Expense by Category	Forecast		Budget	
Advertising	\$2,250,973	21.1%	\$2,148,000	21.6%
Client Events, FAM and Entertainment	\$411,734	3.9%	\$524,170	5.3%
Travel and Tradeshow	\$305,514	2.9%	\$301,505	3.0%
Digital Engagement	\$1,945,976	18.3%	\$917,666	9.2%
Organization Tools	\$112,926	1.1%	\$76,758	0.8%
Research	\$239,393	2.2%	\$164,990	1.7%
Event and Organization Sponsorships	\$426,907	4.0%	\$390,000	3.9%
Memberships	\$41,230	0.7%	\$61,669	0.6%
Contract Services	\$771,171	7.2%	\$647,800	6.5%
Professional Development & Training	\$312,000	2.9%	\$264,950	2.7%
Destination Programming	\$134,068	1.3%	\$510,352	5.1%
Payroll and Human Resources	\$3,029,852	28.5%	\$3,238,340	32.6%
Technology	\$153,209	1.4%	\$138,512	1.4%
Office Supplies and Equipment	\$55,919	0.5%	\$79,666	0.8%
Fees and Licenses	\$178,967	1.7%	\$228,770	2.3%
Facilities Expense	\$241,110	2.3%	\$254,420	2.6%
	\$10,643,959		\$9,947,568	

Expense by Source Funding	TOT		BIA	
Advertising	\$69,068	1.5%	\$2,181,905	35.7%
Client Events, FAM and Entertainment	\$155,660	3.4%	\$256,074	4.2%
Travel and Tradeshow	\$0	0.0%	\$305,514	5.0%
Digital Engagement	\$1,575,752	34.8%	\$370,224	6.1%
Organization Tools	\$45,973	1.0%	\$66,953	1.1%
Research	\$110,340	2.4%	\$129,053	2.1%
Event and Organization Sponsorships	\$149,414	3.3%	\$277,494	4.5%
Memberships	\$55,536	1.2%	\$18,695	0.3%
Contract Services	\$48,119	1.1%	\$723,052	11.8%
Professional Development & Training	\$265,139	5.9%	\$46,871	0.8%
Destination Programming	\$134,068	3.1%	\$0	0.0%
Payroll and Human Resources	\$1,332,919	29.2%	\$1,706,933	27.9%
Technology	\$153,209	3.4%	\$0	0.0%
Office Supplies and Equipment	\$24,626	0.5%	\$31,293	0.5%
Fees and Licenses	\$174,917	3.9%	\$4,050	0.1%
Facilities Expense	\$241,110	5.3%	\$0	0.0%
	\$4,525,850		\$6,118,110	
	42.5%		57.5%	

Organizational KPIs (FY22-23)

1. Achieve a 5% year-over-year increase in revenue to Sonoma County’s lodging properties as reported through the Dean Runyan economic impact survey.

The Dean Runyan 2022 Economic Impact report shows revenue to Sonoma County surpassed pre-pandemic levels by 2.7%.

Economic Impact of Travel in Sonom County	2017	2018	2019	2020	2021	2022
Total Destination Spending (\$Million)	\$2,084	\$2,200	\$2,237	\$1,137	\$1,196	\$2,299
Earnings (\$Million)	\$767	\$815	\$863	\$653	\$763	\$931
Employment	\$22,510	\$22,380	\$22,360	\$16,260	\$17,610	\$21,150
Local Taxes (\$Million)	\$97	\$108	\$110	\$74	\$115	\$130
State Taxes (\$Million)	\$85	\$91	\$95	\$61	\$80	\$93
Total Taxes (\$Million)	\$182	\$199	\$204	\$135	\$195	\$223

Source: Dean Runyan Associates

Funding Source	FY20-21- Actuals	FY22-23 – Estimated	Change
Transient Occupancy Tax (unincorporated Sonoma County) **includes prior periods late payments	\$3,516,667	\$3,088,183	-12.2% (\$428,484)
SCTB Business Improvement Area	\$5,912,755	\$5,652,233	-4.4% (\$260,522)

2. Increase length of stay from 2.8 nights (2020) to 3.1 nights (or longer), focusing on winter and spring, helping to flatten weekend vs. weekday travel (per Longwoods International Visitation Study).

The 2022 Longwoods International Visitor Study shows length of stay decreased from 2.8 nights in 2020 to 1.9 nights in 2021. 2022 did see a slight increase to 2.1 nights, but we did not achieve the 2.8 night goal. The slow return of international travel and groups were key factors in this result, however, we also saw a more focused visitation from the Bay Area and northern California. SCT continued to and will continue in the future to advertise in direct flight markets with the aim of gaining visits from leisure travelers who live further away and will stay longer.

3. Increase group leads to partners by 10% year-over-year; generate 12,000 influenced room nights.

Through tremendous efforts of the Business Development team, this goal was surpassed:

- 12,365 influenced room nights (103.04% of goal)
- \$3,934,959 in hotel room rental revenue + TOT + BIA.
- This represents a 271% year-over-year increase

4. Generate a marketing program Return-on-Investment that exceeds pre-pandemic levels (per Longwoods ROI Study) and continues to show a high level of customer awareness of SCT advertising.

SCT's paid advertising campaign continues to deliver tremendous return on investment results:

Year/Paid Campaign Period	Overall Advertising ROI ¹	Tax Revenue ROI	Incremental Trips	Incremental Visitor Spending ²	Incremental Taxes
2019 (Jan – June) (\$.6 M ad investment)	\$166:1	\$18:1	580,000	\$94 M	\$10 M
2021 (April – Aug) (\$.8 M ad investment)	\$203:1	\$21:1	1,500,000	\$164 M	\$16.6 M
2022 (Jan– April) (\$.4 M ad investment)	\$262:1	\$27:1	700,000	\$106.4 M	\$10.8 M

¹ For every dollar spent on tourism paid advertising, the return is noted in the first number.

² Due to the paid marketing campaign (only). This does not represent overall annual visitor spending.

This is among the highest ROI in the tourism industry showcasing an enormously efficient and effective campaign.

5. Ensure the organization's DEI imperative has a high level of inclusion and satisfaction within the programming (internal) and diverse audiences are being included at increasingly higher levels in sales and marketing pieces (external).
 - SCT continued to work on its DEI goals through a number of components:
 - Team hiring practices
 - Working with the County on the GARE Assessment for tourism businesses (specifically vacation rentals)
 - Continued education through participation in classes offered through Destinations International
 - The SCT executive team completed the Destinations International Equity, Diversity and Inclusion online course.

SCT does need to move further forward into true DEI integration. This will be done through hiring a consultant to steer this initiative.

6. Bolster partner satisfaction in the organization's efforts with results shown through an annual partner survey achieving a high or very high overall rating.

SCT created and distributed a partner survey that was in the field June 7 – Aug. 3 to identify a number of key insights pertaining to partner satisfaction with SCT's programs, the state of the industry and considerations SCT should be aware of as new programming is designed.

While questions were asked outside of the programming satisfaction levels, and SCT will most certainly consider all comments – both positive and negative, the programming satisfaction matrix is the component for which the SCT team must be laser focused. Within this section, nine questions were asked of partners.

Please identify the effectiveness of SCT's Initiatives (with Partner responses):

Initiative	Extremely Effective	Somewhat Effective	Not Effective	Not Applicable
Provide tourism performance and market research insight	47%	37%	5%	12%
Provide networking opportunities	37%	46%	7%	10%
Provide marketing, advertising, PR and other promotional opportunities	44%	45%	6%	4%
Develop programs to advance sustainable travel and promote responsible travel behavior	36%	43%	5%	16%
Offer partners opportunities to include events in SCT's online calendar of events	36%	43%	5%	17%
Offer opportunities for partners to participate in trade shows, sales missions and client events	23%	42%	9%	26%
Develop and promote partner deals and offers on SCT's website	24%	48%	10%	19%
Provide partner education/information sessions, webinars, briefings, etc.	25%	51%	5%	20%

Identify the effectiveness of SCT's Initiatives (with partner responses):

200 participants responded to the survey and this question.

While most of the survey respondents responded favorably, the survey in its entirety provides great insights into the areas for which partners ask SCT to better serve their needs.

7. Ensure the process for long-term funding secured in FY21-22 is operational and funds are distributed to the organization as designated.

Recognizing the need to diversify its funding sources and more fully include a growing sector of the lodging industry into the sales and marketing efforts of SCT, the organization worked to integrate the short-term rental community into its Business Improvement Area (BIA) program. The process we thought would be concluded prior to June 30, 2022 required additional time to get through all phases of conveying information and obtaining approvals, so the KPI continued into FY22-23.

The organization worked through the process of informing and gaining support from each municipality within the BIA structure and had the program approved by the County. Throughout the process the short-term rental community was kept informed, but when the final discussions with that segment occurred, objections from owners/managers were such that SCT determined the timing was not right for this integration. This resulted in SCT forming a new Vacation Rental Committee working to gain better insights into this critical lodging sector and identify opportunities to better market the vacation rental experience.

Work continues on identifying long-term funding sources that help the organization become truly resilient against potential financial impacts.



STRATEGIC PLAN FUNDAMENTAL COMPONENTS

Sonoma County Tourism is guided through its foundational elements. Each of these works together to create a solid base from which all programming is built. During FY22-23, these organizational statements were:

Mission: Inspire overnight travel to Sonoma County that bolsters the region's economy and encourages responsible stewardship of the community's abundant resources.

Vision: Sonoma County will be the premier destination in North America for responsible travelers who enjoy, protect and preserve the area's bountiful natural and cultural resources.

Values:

- *Strategic* – SCT approaches all programs and opportunities with a foundation of research and structured with consideration for all potential program outcomes and impacts to the organization, key stakeholders and the County at large.
- *Transparent* – All budgets and programs administered by SCT are done so within an environment of transparency. This helps ensure all stakeholders have a high level of understanding regarding the operational effectiveness of the organization and can champion the organization as an efficient steward of the funding provided.
- *Collaborative* – SCT is successful only if its partners and stakeholders are successful. This occurs within a robust business-development environment offering opportunities for constituents to benefit from partnerships with the organization and gain business-driving benefits from the programs administered by the organization.
- *Inclusive* – SCT is committed to ensuring persons of all backgrounds are included and welcomed throughout its internal operations and external audience outreach. A strong dedication to diversity, inclusion and equity will guide the organization.
- *Entrepreneurial* – SCT operates as an ambitious and nimble business seeking new opportunities for revenue and growth. SCT staffers work to find business development opportunities that drive revenue for partner businesses and generate new revenue for the organization.
- *Trusted* – SCT will develop programs founded on research, driven by best-in-class execution and with results conveyed via various partner communications channels in a timely and truthful manner.



FY22-23 Organizational Priorities

Business Recovery

As the world moves into a post-pandemic environment, Sonoma County Tourism must look at both the long- and short-term strategies for successfully driving business to the destination. Robust sales and marketing programs will be conducted that drive brand awareness, evolve the brand to meet shifting consumer preferences and compel visitation. This is all done overlaid on a data-driven foundation of proprietary, general tourism industry and consumer research.

The key strategies within this priority are:

- Obtain and convey industry insights and marketing analytics
- Drive inquiry and conversion (visitation) through advertising and other paid opportunities
- Amplify the brand
- Acquire, engage and expand key audiences
- Develop business from existing and new market segments
- Engage partners
- Restart travel trade/international outreach as the market returns

(Each will be covered in greater detail in the programming section.)

Destination Stewardship

As the nation's first Destination Stewardship Organization, SCT is committed to taking a broad-based approach to its responsibility to protect and preserve the destination. This means that while marketing and sales will continue to drive the lion share of the budget and programming, SCT also will work more closely with community organizations and land managers to help ensure a vibrant long-term future for Sonoma County, addressing critical issues of importance to residents and imperative for the long-range health of all communities.

The key strategies within this priority are:

- Encourage responsible travel behaviors
- Align with local organizations and national programs with a similar mission
- Develop and communicate broad-based approach to destination management
- Initiate and maximize the Accredited Hospitality Professional (AHP) program

(Each will be covered in greater detail in the programming section.)

Organizational Sustainability

As a not-for-profit organization, funded through public funds, Sonoma County Tourism must operate its business in a fully transparent, ethical manner ensuring public dollars are allocated in the most effective manner possible. Helping to ensure the long-term health of the organization also means diversifying its funding sources to lessen reliance on any one funding stream.

The key strategies within this priority are:

- Develop and integrate long-term funding.
- Run an effective business.
- Create a high-performance environment founded in employee engagement, wellness and team development.
- Ensure team inclusion and strong commitment to Diversity, Equity and Inclusion (DEI).
- Conduct timely and relevant stakeholder outreach.
- Ensure a highly engaged board of directors and committees.
- Prepare for and manage crises situations.

(Each will be covered in greater detail in the programming section.)



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every choice created change,
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Business Recovery

Overall

- Obtain and convey industry insights and marketing analytics, providing to partners at least monthly via Partner News and Insights newsletter.

SCT provided partners with monthly Tourism Insights and Performance newsletters throughout the year. These newsletters conveyed the performance of the local industry along with trends and other insights helpful for making data-supported business decisions.

SCT partnered with leading research firms to provide insights that laid the foundation for all business decisions:

- Longwoods International – Annual visitor study, Marketing ROI study
- Dean Runyan Associates – Annual economic impact report
- Tourism Economics – Monthly dashboard showing a collective of industry data
- Near – geo-specific tracing of travelers in the destination
- TravelClick – futures forecast of pending booked business
- STS airport activity

This data is available in the Partners section of [SonomaCounty.com](https://www.sonomacounty.com).

- Drive Visitation among Responsible Travelers through advertising, enhanced content distribution, the new Sonoma County App and other paid, earned and owned opportunities.

The first half of FY22-23 saw robust visitation. Summer through Fall, and most notably absent impacts from fires, proved very successful. The second half of the year, however, was marked by record rainfall, which while tremendously beneficial, did impact visitation.

SCT's marketing team, through industry and proprietary research leaned into consumers' interest in self care, wellness and connecting with family and friends through travel experiences. The campaign, Pause & Effect showcased Sonoma County's capacity to bridge both wellbeing and responsible travel.

The campaign, with a Nov. 1, 2022 - April 30, 2023 flight, invited travelers to reenergize, relax and reconnect. The campaign included responsible travel messaging delivered through content development (paid, earned and owned channels), updated imagery and optimized media channels.

SCT also fully launched its app with continued platform development. At the close of FY22-23 (3,313) have downloaded the app and use it to help plan the visit.

- Continue to see year-over-year growth of revenue into the BIA partners and the county.

Fiscal year 2018-19 BIA revenue: \$5,038,723

Fiscal year 2022-23 Estimated BIA revenue: \$5,652,233

Growth of 11%

Business Development

SCT's Group Business Development team employed smart relationship building and destination promotion initiatives throughout the year to influence bookings for business and leisure groups.

- Engage in one-on-one meetings with key planners through interactions including trade show attendance, sales trainings, client events and in-person office meetings.
 - Team goal: 841 meetings (10% increase over FY21-22)
 - Result: 1,482 -- 176% of goal
 - Tradeshows, Conferences, & Events Attended: 47
 - Client Events: 4
 - Hosted FAM Tours: 6



- Elevate group business and leisure travel leads and partner booking, highlighting urban experiences and unique venues.
 - Team goal: 12,000 influenced leads per business development manager (increase of 9% over goal)
 - Result: Influenced Room Nights: 13,095 (109% of goal; 12,000)
 - Compared to FY 21-22's production of 3,332 room nights at \$1,289,338, 22-23 represents a YoY increase of 271% influenced room nights.
 - Economic Impact: \$4,145,358 (Room Revenue: \$3,665,573; TOT: \$406,473; BIA: \$73,311)
 - Cvent Response Rates:
 - RFP Response Rate: 99%
 - Average Response Time: < 12 hrs
 - Wedding Guide:
 - Views: 26,547
 - Total Page Views: 48,197



- Partner Referral (click throughs): 13,937
- Average time on the Guide: 2 minutes 12 seconds
- Top Markets: Bay Area, Los Angeles, Sacramento, Seattle, and New York

SCT held a session with the Santa Rosa hotels to identify how the organization can better represent these urban properties. As a result, Santa Rosa was the featured cover of the Spring Summer Sonoma County inspiration guide.



- Engage Partners through business development opportunities in key audience and market segments.
- Partners also participated in a holiday sales mixer event aboard the San Francisco Giants' yacht including a tour around the San Francisco Bay. The Business Development team worked to identify opportunities for partner inclusion in trade shows, connections to meeting planners and other business building opportunities.

Partners participated in trade shows, client events and sales missions:

- San Francisco Client Event
- IMEX
- IPW
- UK Sales Mission
- CalSAE Elevate
- Visit California Luxury Forum

The Sales team organized a quarterly series of “Destination Sales Team” mixers, inviting sales teams from hotels, wineries, attractions, tour operators, and other businesses who focus on groups and travel trade sales. Mixers were held in:

- Balletto Vineyards – Unincorporated Sonoma County
 - Paradise Ridge – Santa Rosa
 - Brooks Note Winery and Tasting Room – Petaluma
 - Blue Ridge Kitchen – Sebastopol/The Barlow
- Continue to increase participation in and revenue from the Bandwango Sonoma County Tasting Pass.
 - Team goal: \$37,405 (10% increase over FY21-22)
 - Result: Total Revenue: \$113,747
 - SCT Revenue: \$22,186
 - SCT Partner Revenue: \$76,512
 - Number of Passes Sold: 2,563



Travel Trade

As it was clear leisure groups and international travel would begin to emerge following the pandemic, SCT moved strategically back into the market. Percy Stevens, a well-respected industry veteran was hired as Director of Travel Trade and initiatives in key international markets took shape. While many of the goals were those that provided a benchmark for future programming, the team aggressively worked to reaffirm the appeal of Sonoma County to global tour operators, wholesalers and Online Travel Agencies (OTAs).

- Restart travel trade/international marketing in three key markets: U.K., Germany, Australia. Representative firms have been hired in all markets and efforts are underway.

SCT reengaged representative firms in the U.K., Germany and Australia and has begun in-market promotional efforts.

- Markets Served: USA, Canada, Mexico, United Kingdom, Australia, Germany, India, France, Italy
 - Client Site Tours and International FAM Tours: 7
 - Tradeshows, Conferences and Client Events: 11,773 1:1 Meetings and Trainings
 - Represent Sonoma County at four domestic trade shows:
 - Visit California Luxury Forum (Oct '22)
 - Visit California Signature (Nov '22)
 - GoWest Summit (March '23)
 - US Travel IPW (May '23)
 - Represent Sonoma County at four international trade shows:
Sonoma County was represented at:
 - BrandUSA Travel Week Frankfurt (Aug '22)
 - Visit California Mexico Trade Event
 - IPW – US Travel/Brand USA international travel show
 - ILTM
 - Room Nights Produced: 3,464
 - Note: Room nights are a result of SCT's owned campaigns and not a cumulative total of all room night production from international sources.
 - 12% increase in destination bookings through Hotelbeds.
- Expand In-market product offerings specially for lodging programming.

The two campaigns done through OTAs, Expedia and Hotelbeds were specifically designed to drive business to BIA lodging properties.

- Add new hotels to the options available to leisure group planners/operators. Increase international programs offered and Itinerary Inclusion in catalogues specifically for fly-drive offerings.
 - Germany - In FY22-23, SCT executed five promotional campaigns which resulted in four new itineraries and three new hotels added.
 - UK - In FY22-23, the campaigns executed resulted in three new fly-drive itineraries added to tour operator offerings.
 - Australia - In FY22-23, the campaign resulted in one new itinerary added to tour operator offerings.

Marketing/Communications

- Engage targeted priority markets and audiences.

SCT completed through its Intent Marketing “Pause and Effect” campaign noted in this report. During the year, as the drive market continued its strength, but direct flight markets continued to expand, SCT evolved its marketing channels to reach these markets. While the drive market continues to be the predominant visitor base, we continue outreach to direct flight markets through main digital channels. Those in key markets (primarily wine buyers) of New York, Chicago, Houston and Florida cities are those in which we reach with secondary digital marketing and media outreach.

The impact of the TODAY show will be measured in the upcoming marketing ROI study.

- Amplify storytelling around cities, towns and neighborhoods.

SCT’s “What’s Happening in Sonoma County” video series kicked into high gear during the year. Hosted by Chris Vomvolakis with AJ Ruiz as the videographer, the series aims to provide a buzzy, story-driven approach to conveying upcoming events and reasons for a timely visit to Sonoma County. Episodes included:

- Winter Lights: Skating on the Square
- Extended Stay Promotion
- Cheese in Sonoma County
- April is Wine Month



SCT also started its Neighborhoods Project – an in-depth look at the unique features of Sonoma County’s neighborhoods and towns conveyed through video storytelling. The project will expand during FY23-24.

- Launch Sonoma County App through to phase 2 – creating additional opportunities to drive business and enhance loyalty.

The app was launched and had tremendous success during the year.

Team goal: 1,400 active users

Result: 3,133 active users -220% of goal

Additional stats:

- 17,000 downloads
- App store rating: 4.8/5
- Number of partners featured: 2,528
- Number of Challenges: 23
- Average time spent in the app: 3:31

Media coverage specific to the app:

Travel + Leisure featured the app in Jan. 2023: [This Interactive App Will Help You Plan the Perfect Trip to Sonoma \(travelandleisure.com\)](https://www.travelandleisure.com) resulting in enormous interest in the product.

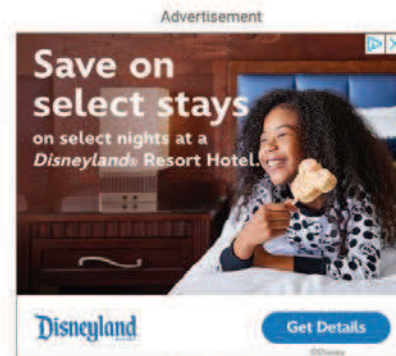
This Interactive App Will Help You Plan the Perfect Trip to Sonoma

“Our destination has an endless number of unique businesses and activities to discover, so we’ve developed this App as the go-to resource for everyone.”

By [Stacey Leasca](#) | Published on January 13, 2023

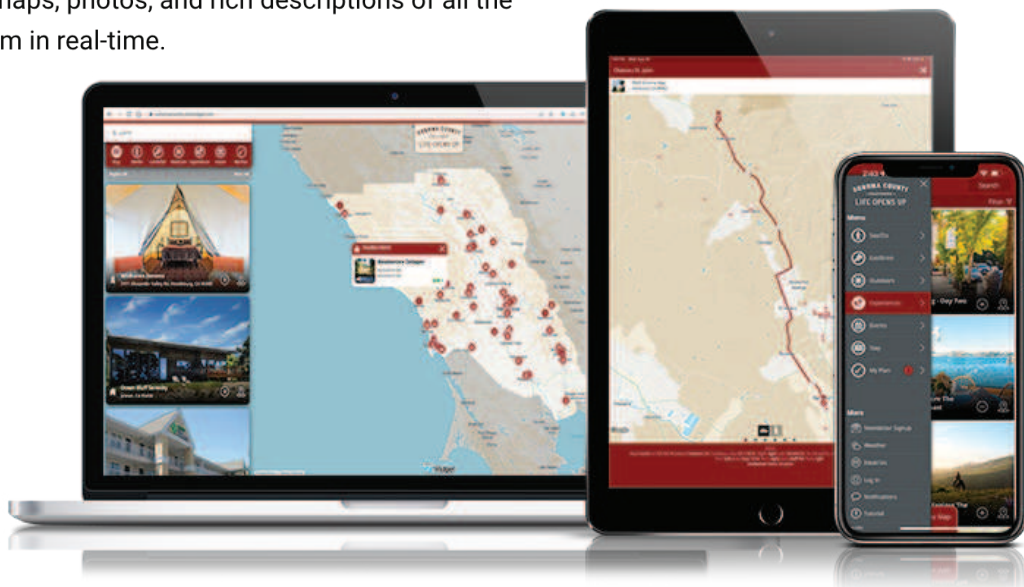


PHOTO: YIN YANG/GETTY IMAGES



“We created the Sonoma County App to be as useful and informative for locals as it is to first-time or regular visitors,” Todd O’Leary, the vice president of marketing and communications at Sonoma County Tourism, shared in a statement. “Our destination has an endless number of unique businesses and activities to discover, so we’ve developed this App as the go-to resource for everyone.”

According to Sonoma County Tourism, the app highlights the coolest experiences across the county and allows users to research and plan a trip tailor-made for them. Visitors can even book reservations right in the app and access interactive maps, photos, and rich descriptions of all the options surrounding them in real-time.



- Continue to develop responsible travel messaging, and increase exposure audiences to responsible travel content, including responsible travel page, LNT principles, video views, travel kindly pledge, etc.

Responsible travel is now fully integrated into all components of SCT’s sales, marketing and community engagement efforts. The paid media campaign that began Jan 2023 directs people to SonomaCounty.com sustainable page helping ensure greater exposure to the overall organizational commitment and the various initiatives.

In Oct 2022, SCT with its agency partner, Fahlgren Mortine, developed a targeted responsible travel strategy designed to build over three phases and bridge the gap between wellness and responsible travel. During FY22-23 the first phase was completed:

Invite and inform – This phase aimed to drive upper funnel awareness of Sonoma County as a responsible travel destination and drive/encourage sustainable travel to and throughout the destination. Campaign objectives were to position Sonoma County as a leader in the sustainable and responsible travel space and to drive weekday visits during the off-season. Tactics included utilizing media to generate awareness of Responsible Travel messaging and increase website traffic to SCT’s owned digital channels.

- Paid media
 - Initiatives reached Responsible Travelers in priority in-state and out-of-state markets and created opportunities for audience discovery and awareness of Sonoma County through the lens of Pause & Effect messaging.
 - Media mix included digital, video, audio and content sponsorships.
 - Total media campaign spend: \$900,489
 - Media KPIs were monitored, measured and optimized against impression delivery, clicks and website engagement on a monthly basis.



- Earned Media
 - 94 total placements secured including 37 Top 100 placements
 - Secured 13 total feature placements
 - 398,435,619 total audience
 - 7.7 Barcelona Principles (qualitative) average score for November – April (goal is to maintain at least a score of 7)

- Measure and report ROI – achieving pre-pandemic level of 166:1.

The paid marketing Return on Investment (ROI) study was conducted by Longwoods International for the

Spring 2022 campaign. For this campaign period, the return-on-investment was 262:1 in visitor spending and 27:1 in taxes generated for the county. The 2022 Spring ROI is higher than that of the 2019 and 2021 Spring Summer studies. This is actually among the highest ROI in the tourism industry showcasing an enormously efficient and effective campaign.

(See the expanded overview in the Overarching KPIs section.)

- Leverage new and developing partnerships:
SCT worked with advertising partner – Volta. This partnership places Sonoma County advertising on electric vehicle charging stations throughout Southern California – a key target market for SCT. This not only raised awareness about the region, but aligned with SCT’s commitment to sustainable living.

- Continue ADA work on website, including making top 10 web articles available audibly. Audit site for ongoing ADA compliance opportunities.

All pages on website are available audibly given a browser based functionality for those with special needs. Our broad-based content audit in FY22/23 addressed ADA compliance specifically with captions for all images and other best practices. Global styling is also based around ADA compliance for font size and color.



Sonoma County Tourism advertising on Volta charging station at a Whole Foods in Southern California

- Create updated event sponsorship process to review, vet, and activate on opportunities throughout the year. Communicate new process to existing and potential event partners.

An updated schedule for applying for sponsorship funds as well as a new application was approved by the board and integrated with partners. This was the first year SCT saw a competitive environment for its sponsorships. The applications were vetted by the Marketing Committee and sent to the Board for final approval. In FY22-23, the following event sponsorships were provided:

- Sonoma County Wine Month
- Sonoma County Barrel Auction
- Harvest Fair Awards Dinner – Oct. 2022
- Artisan Cheese Festival - March 2023
- Taste of Sonoma - June 2023

- Identify and begin integrating marketing initiatives for new BIA payors.

The program to bring vacation rentals into the BIA stalled in 2022. Recognizing the need to better understand the vacation rental industry and the concerns of both non-hosted and hosted properties, SCT formed the Vacation Rental Committee. The aim is to better understand this segment and identify ways to better integrate it into marketing efforts.

Destination Stewardship

Overall

- Encourage responsible travel behaviors, elevating SCT's partnership with Leave No Trace and other organizations that will help elevate this priority.

During the year, SCT partnered with the Regional Parks and Leave No Trace on a video project that showcases each of the Seven Principles. These videos are available on the [SonomaCounty.com/sustainable](https://www.SonomaCounty.com/sustainable) web page.



- Position Sonoma County Tourism as an industry leader in destination stewardship through integration with local, national and international organizations.

SCT elevated the organization's industry position through being a featured speaker at Green Destinations International Conference, the Travel and Tourism Research Association (TTRA) Marketing Outlook Forum, the TTRA International Conference and the DMA West Education Summit.



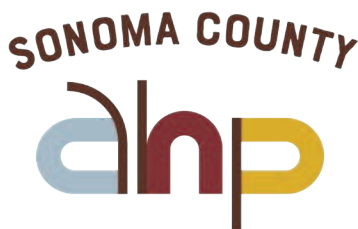
Devin McConnell was made SCT's Manager of Sustainability and Climate Initiatives. He has spent the year identifying opportunities for SCT to be better integrated into statewide and national organizations. He attended the Global Sustainable Tourism Council annual conference and is working to identify a certification program for Sonoma County. Devin also sits on the CalTravel Sustainability Committee where he made significant contributions to the CalTravel Sustainability and Stewardship Toolkit for Statewide DMOs.

SCT also joined the US Travel Association's Sustainability Coalition to help further policies and industry practices around sustainable travel.

SCT participated in the Sustainable Tourism International's video series that was launched worldwide on World Tourism Day Sept. 27, 2022.

- Finalize and socialize Destination Sustainability and Resilience master plan, identifying action plan funding, roll-out and integration.

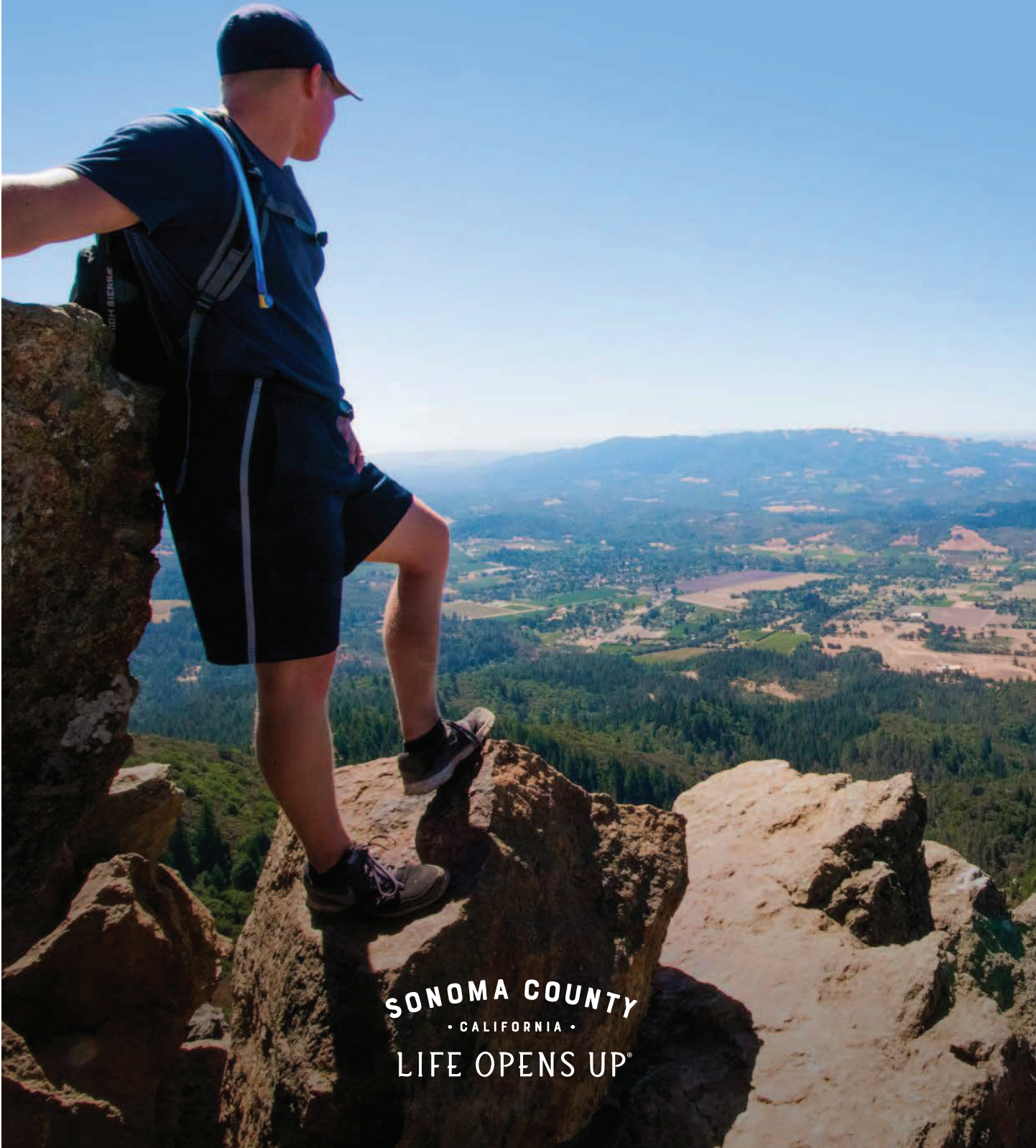
The plan was completed and launched on May 11, 2023.



SONOMA COUNTY TOURISM

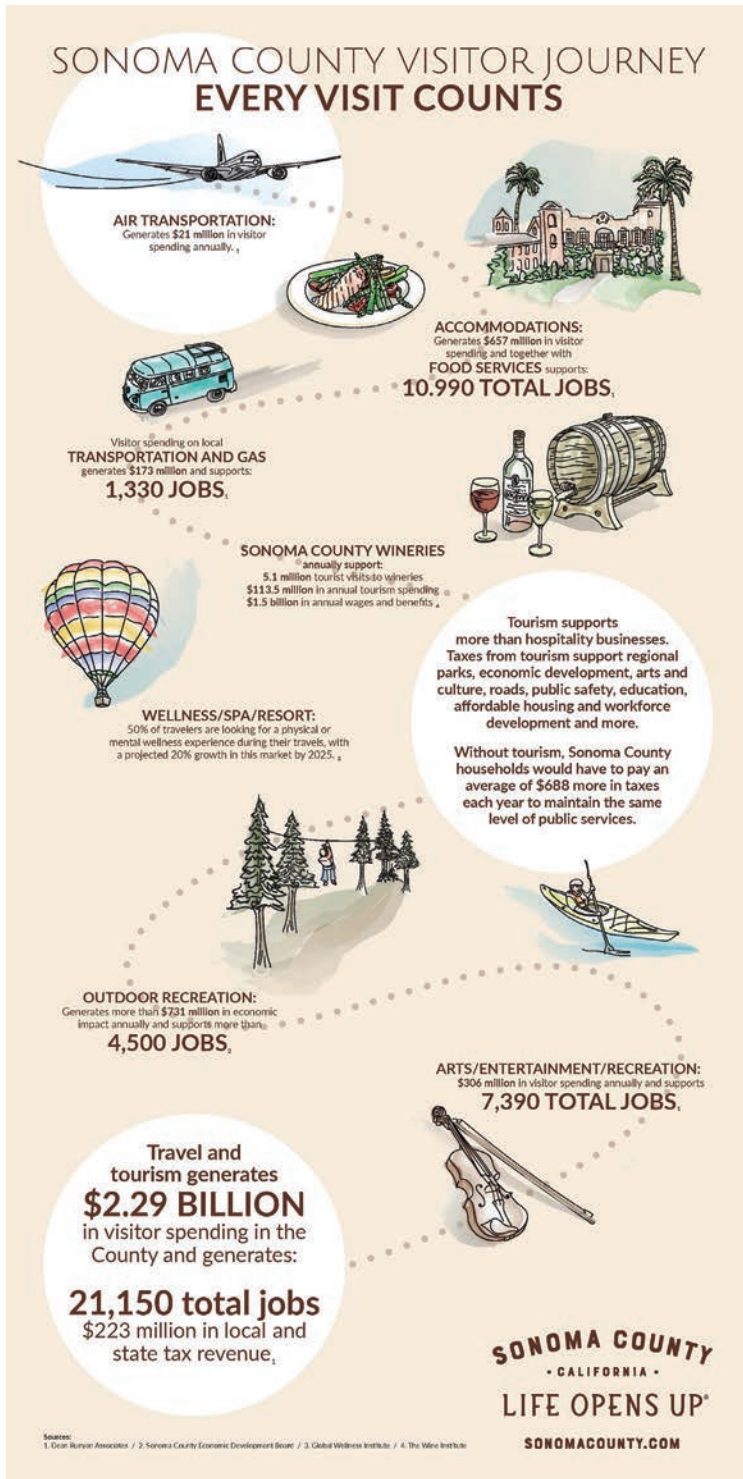
DESTINATION STEWARDSHIP AND RESILIENCY MASTER PLAN

MAY 2023



SONOMA COUNTY
• CALIFORNIA •
LIFE OPENS UP®

- Continue to grow the Accredited Hospitality Professional (AHP) program, creating additional opportunities for continuing education. Continuing education programming included:
 - Power of Tourism Lunch & Learn – Economic Data
 - Social Media Training
 - Summer Celebration Networking at Hook & Ladder
 - Workforce training was conducted at Analy High School
 - Petaluma Lodging Association funded scholarships for high school students to go through the program in 2023-24 school year.
- Execute a robust National Travel and Tourism Week, including a Stars of the Industry Event, to raise awareness of the importance of the tourism industry to the residents of Sonoma County.



- Stars of the Industry was held on May 9 with over 240 in attendance, and more than 21,000 votes cast. Industry superstars were selected in 11 categories:
 - Front of the House – Bryan Bergman, Lo & Behold
 - Heart of the House – Santos Perez De Wile, Fairmont Sonoma Mission Inn & Spa
 - Rising Star – Hayden Puryear, Larson Family Wines
 - Environmental Stewardship / Sustainable Practices – Ridge Vineyards
 - Customer Experience – Brewsters Beer Garden
 - Lodging Property of the Year – Lodge at Bodega Bay
 - Community Enrichment – Transcendence Theatre Company
 - Champion of the Industry – Dustin Valette, Valette/The Matheson
 - Innovation Award – J Vineyards and Winery
 - Accredited Hospitality Professional (AHP) Program Champion – Analy High School
 - Legacy Award – Don & Thera Buttarò
- A Gold Resolution was presented at the Board of Supervisors meeting in honor of the travel and tourism industry on May 9.
- The Destination Sustainability and Resilience Master Plan was publicly released at a Community Mixer on May 11.

- A Sonoma County Tourism Cares event was held at The Humane Society on May 12.
- Throughout the week over 20 businesses were lit around the County in Pinot Purple. These businesses were featured on both sonomacounty.com and the Sonoma County App.
- A full-page ad ran in the Press Democrat and in 2 weekly papers to showcase the economic impact of tourism in the County, along with a full page ad congratulating the winners of Stars in the Industry. Digital ads were also run.
- Accredited Hospitality Program
 - Increase the number of Accredited Hospitality Professionals from 128 to 350.
 - Enrolled in the AHP program since inception: 381
 - Fully accredited: 253
 - In progress: 128
 - Percentage to goal as of 6/30: 67%
 - At least 30 partners actively engaged in supporting continuing education for AHP.
As of June 30, 21 partners are actively engaged in the continuing education efforts.
 - Quarterly updates to online module and curriculum for AHP.
An RFP was sent for an online platform, but the renovation of the SonomaCounty.com website has put this on pause.
 - A minimum of 10 AHP classes to be hosted at partner sites.
At year's end, six (6) classes have been held at partner sites.
- Sustainable/Responsible Tourism
 - Identify measurement metrics that show the positive impact of shifting consumer behavior.
Staff has made contact with a scientist from Leave No Trace to identify a measurement tool. At this point, no measurement tool exists.
 - Develop dynamic voluntourism page on sonomacounty.com.
The page continues to be updated, and currently includes these opportunities for travelers to volunteer while in the destination:
 - Redwood Empire Food Bank
 - Farm to Pantry
 - Sonoma Ecology Center
 - Sonoma County Regional Parks

The page also includes link for travelers to identify additional opportunities.

- Develop carbon offset incentive program.

The carbon offset program has been added to SonomaCounty.com. The usage is fairly small, so SCT is reaching out to partners to identify opportunities for refinement and expansion.

SCT also includes the carbon offset calculator on its Travel Authorization Form for all employees traveling on business. SCT will pay for the carbon offsets for each trip.

- Double the number of Sonoma County Leave No Trace Coalition partners from 36 to 72.

Twenty-six businesses signed on to becoming Coalition partners in FY22-23, falling short of our goal. We have asked our collaborators at Sonoma County Regional Parks to take an active role in getting new businesses on board with this initiative for FY23-24.

- Onboard 20 businesses (10 coastal and 10 river area businesses) to Rewards for Rubbish program. Generate report near end of FY measuring program success.

Despite a great deal of outreach (phone, email and in-person), we were not successful at getting businesses to adopt the program beyond one visitor center and one business. In addition, the volunteer engagement has been modest. We will continue to offer the program to any businesses interested in participating, but will not prioritize this specific program in the coming year.

- Hold 3 Sonoma County Tourism Cares events per year and 10 Adopt a Road Clean-up events. This goal has been reached. During the year, we held the following:

- Sonoma County Tourism Cares Activities:
 - **Nov & Dec 2022:** Donation Drive for Personal Hygiene Products: Partnered with 7 chambers/ visitor centers resulting in 365 lbs. of product donated to Sonoma County's unhoused population.
 - **March 2023:** Native Grasslands Planting with Conservation Works: Planted native grasses to prevent soil erosion and assist in carbon sequestration, and milkweed -- an important food source for the threatened monarch butterfly.
 - **May 2023:** Humane Society of Sonoma County: Donated and bagged 418 lbs. of pet food and revitalized the campus's canine play area.



- **Road Clean-ups**
Sonoma County Tourism has adopted roads in each of the five districts. During FY22-23, ten road cleanups occurred. With a participation of more than 70 SCT staff and partners, 103 bags of garbage were removed from the roads.

Adopted Road	Clean-Up Date(s)
Airport Blvd. (Santa Rosa)	July 22, 2022
Petaluma Hill Road (Santa Rosa)	Aug. 31, 2022
Armstrong Woods Road (Guerneville)	Oct. 20, 2022
Arnold Drive (Glen Ellen)	Nov. 18, 2022
Main St./Petaluma Hill Road (Penngrove)	Dec. 2, 2022
Airport Blvd. (Santa Rosa)	Feb. 21, 2023
Petaluma Hill Road (Santa Rosa) *	April 7, 2023
Armstrong Woods Road (Guerneville)	April 13, 2023
Arnold Drive (Glen Ellen)	May 25, 2023
Main St./Petaluma Hill Road (Penngrove)*	June 26, 2023

**In partnership with the California Highway Adoption Co.*

- **Hospitality Collaboratives/Mixers**

A second Coffee + Collaboration was held with elected officials with the topics of discussion being those they determined via an informal poll. The industry performance, most especially Transient Occupancy Tax (TOT) collections and forecast was the top discussion point.

This will continue to be a semi-annual event.



Overall

- Develop and integrate long-term funding.

The central initiative to expand the BIA was suspended in October 2022. This initiative may be relaunched once a higher level of communications and connectivity is achieved with the vacation rental community as well as current BIA participants.

- Effectively manage current and additional funding within a fully transparent financial environment.

Financials continue to be provided to the Finance & Legal Committee and the Board as well as available to any partner or requester.

- Create a high-performance environment founded in employee engagement, wellness and team development.

The SCT team is driven toward high-performance. While the Marketing and Business Development teams have visible, measurable metrics for success and can easily track performance, other teams have metrics that showcase the tremendous work being done in the areas of research, sustainability, community engagement and operations.

- Continue to see a high level of employee engagement scores.

SCT conducted two employee engagement surveys – a full survey and a “lite” survey to set a benchmark and then to determine improvement in “need” areas. Scores improved in all areas, but most especially within the “engagement” section. This is a testament to a commitment on the part of the SCT executive team and an incredible group of professionals committed to serving its partners and the County at the highest possible level.

- Ensure team inclusion and strong commitment to Diversity, Equity and Inclusion (DEI).

The SCT executive team has completed the Destinations International EDI course. The SCT team is engaged in community initiatives around DEI and will continue to elevate this initiative throughout the year.

- Elevate the perception of SCT among key stakeholders and partners as measured through a partner engagement survey.

Partner engagement survey was conducted in June and completed in August. A snapshot of results is included in the Organizational KPIs at the beginning of the report.

- Identify ways to increase engagement of the SCT Board and Committees.

SCT has engaged Tom Floyd of Flouracity in developing board development programming. The Board completed the DiSC assessment allowing people to better understand the personalities on the board and potential approaches to initiatives based on the traits of that personality type.

During its annual board retreat, SCT asked board members how they would like to evolve the monthly meetings – both in format and content – to encourage robust discussion. Those changes have been integrated into the agenda and approach to the meetings

- Continue to update and educate the team and all internal audiences on the crisis plan.

Thankfully SCT did not need to mobilize the team against a major crisis. The plan was updated and ready to be deployed during the winter months with the excessive rainfall, but it did not reach the crisis stage.

Finance and Operations

- Finance

- Update accounting policies and procedures manual.

This was not completed during this year. This will be revisited in FY24-25.

- Develop updated tracking method and forecast model for revenue to achieve 5% forecast accuracy for revenue.

Due to dramatic increases in the TOT revenue seen during the first half of the year and timing of receiving the information from the County, SCT had a very difficult time forecasting revenue for the year. While the revenue was mostly above forecast, the winter months and impact of the copious precipitation swung the pendulum the other way and into a negative range. At year's end, industry performance in occupancy, Average Daily Rate (ADR) and Revenue per Available Room (REVPAR) was lagging behind the strong 2022 performance.

- Ensure reserves amount is kept at a three-month operating expenses level (\$2.1 million).

At year's end, reserves are at a three-month operating level. FY22-23 has been a volatile year, but at the close, a more stabilized financial environment allowed SCT to forecast and allocate funds at a more normalized level. This allowed for reserve funds to be allocated as such.

- Find new ways to safely maximize investments for reserves.

The increases by the Federal Reserve in the interest rate has given the traditionally conservative investment portfolio new strength. It was determined that a riskier approach would not be needed at this point.

- Administration/Operations

- Ensure board and committees have full participation.

SCT works to ensure the Board and all committees have a full complement of members. The Board continues to have a few open seats, and SCT is working to fill these positions.

- Develop new asset tracking system for all new equipment and hardware.

A new inventory tracking system was integrated in June helping the team better track all equipment and premium items.

- Update Employee Handbook to encompass evolution of work environment, labor laws and ensure inclusion of DEI imperatives.

The Employee Handbook still need to be updated. Components of the handbook and associated policies, including the Travel and Entertainment policy were updated in FY22-23.

- Data Systems

- Conduct full audit of all listings on the database and ensure information is updated in a timely manner.

A full audit of listings was completed, including responsive timing in updating information requested by partners.

- Create tutorial for partners to ensure administration of the database is easily understood.

Distributed Hospitality Hub training resources to partners, conducted one-on-one partner trainings, had 682 accounts log into the Hospitality Hub (a 5% increase from FY21-22).

- Work with existing platforms and identify new technology that streamlines and automates office processes such as expense reports, online inquiries and Simpleview reporting of activities.

Created a new system for tracking media/PR pitches and articles, travel authorizations, and inventory. Integrated new technology for digital asset management, calendar of events management, and article importing.

Research

- Integrate quantitative and qualitative data to provide added insight and context into visitor flows.

More than ever, SCT is including a variety of models into its research foundation to ensure information is timely, integrates both quantitative and qualitative insights and has the output most salient to partners. Research is derived from:

- Dean Runyan annual economic impact survey
- Longwoods International annual visitor survey
- Longwoods International marketing ROI survey
- STR reports
- Tourism Economics Symphony Dashboard
- Air DnA – tracks vacation rental performance
- NEAR data – tracks people’s movement within the destination using GPS tracking
- TravelClick – provides pace reports and destination-wide booking forecasts

- Use the outcomes from the Destination Stewardship and Resilience Master Plan.

Master Plan Five Imperatives	
1.	Build a Naturally Resilient Destination
2.	Strengthen the Health of the Region’s Economy
3.	Elevate the Resident Quality of Life
4.	Enhance the Breadth of Products and Experiences
5.	Acknowledge and Advance Sonoma County’s Culture and Heritage

The Plan was completed in May 2023. Some of the key outcomes have been integrated into the FY24 25 strategic plan including developing compelling experiences, ensuring accessibility and addressing the need for a convention center. Each of the initiatives has been included in the plan as possible for the upcoming two year timeframe.

- Identity qualitative methodology to measure sustainable travel behaviors.

This continues to be a challenging piece of data to source and identify. SCT has not yet integrated this type of research. Note that a data scientist from Leave No Trace has been engaged for this work.

- Evaluate performance of the Symphony (Tourism Economics) dashboard and opportunities to integrate into marketing campaigns and other research platforms.

SCT did evaluate this product and reviewed it against other similar products. We determined to continue to work with Symphony and have signed a three-year agreement for continued and elevated services.

This data has been integrated into all programming as appropriate. In fact, when the Marketing Committee was determining event sponsorship allocations, they consulted the TravelClick data to determine if the event occurred during a “need period.”

The marketing and sales teams use this data to plan campaigns and outreach.

- Launch and complete survey of visitor centers to determine usage, visitor experience, needs and opportunities.

This survey was conducted by Destination Analysts during the end of 2022 and the first half of 2023. The results were delivered in August 2023.

- Track funding models for other California DMOs and identify changes to their assessments and tax base.

Completed. SCT reviewed funding models for our destinations in our comp set including:

- Visit Napa Valley
- Visit Santa Barbara
- Visit SLO
- Visit Palm Springs

The information was used to determine how SCT could structure its funding increase initiative.



APPENDIX A: ANNUAL INDUSTRY PERFORMANCE

(Dean Runyan Associates, 2022)

2022 Economic Impact of Tourism Report

Summary

The economic impact estimates associated with traveler spending in Sonoma County were measured using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates and are comparable to those found in the 2022p California State, Regional & County Impacts report prepared for Visit California. Further information from Visit California: <https://industry.visitcalifornia.com/research/economic-impact> .-

Travel related spending in Sonoma County saw a tremendous gain in 2022; the \$2.29 billion generated by indirect and direct visitor spending surpassed 2021 levels by 18.7% and pre-pandemic 2019 levels by 2.7%. In fact, Sonoma County was one of only 20 of the state's 58 counties to surpass pre-pandemic visitor spending, and one of only two counties (besides Marin County) in the North Bay Region to do so.

Sonoma County Direct Travel Impacts, 2018-2022

Year	Spending (\$ Millions) <i>Direct & Indirect</i>	Earnings (\$ Millions)	Employment (Jobs)	Local Taxes (\$ Millions)	State Taxes (\$ Millions)	Total Taxes (\$ Millions)
2018	2,200	815	22,380	108	91	199
2019	2,237	863	22,360	110	95	205
2020	1,250	653	16,290	74	61	135
2021	1,938	763	17,610	115	80	195
2022	2,299	931	21,150	130	93	223
2021-2022 Change	+18.7%	+22%	+20.1%	+13%	+16.3%	+14.4%



Sonoma County Direct Travel Impacts: Cities, 2022

City	Spending (\$ Millions) <i>Direct & Indirect</i>	YOY Change	Earnings (\$ Millions)	Employment (Jobs)	Local Taxes (\$ Millions)	State Taxes (\$ Millions)	Total Taxes (\$ Millions)
Cloverdale	14.3	+37%	5.8	131	0.8	0.6	1.4
Healdsburg	239.5	+6%	97.0	2,203	13.6	9.7	23.2
Petaluma	174.6	+36%	70.7	1,606	9.9	7.0	16.9
Rohnert Park	160.0	+15%	64.8	1,472	9.1	6.5	15.5
Santa Rosa	419.7	+33%	170.1	3,861	23.7	16.9	40.7
Sebastopol	27.3	+31%	11.0	251	1.5	1.1	2.6
Sonoma	219.5	+57%	88.9	2,019	12.4	8.9	21.3
Unincorporated	961.6	+5%	389.6	8,846	54.5	38.8	93.2
Windsor	82.5	+24%	33.4	759	4.7	3.3	8.0
Total Sonoma County	2,299	+18%	931.5	21,148	130.1	92.8	222.9

Spending in the hotel, motel and short-term rental segment increased by 11% over 2021 levels comprising a 43% share of overnight trips, and spending on camping stays classified in the other overnight category in the table below, increased by 26% over 2021 levels. The following table provides total and average spending estimates for overnight travelers to Sonoma County in 2022.

Average Travel Spending by Overnight Visitors in Sonoma County, 2022*

*The spending figures shown represent expenditures on all travel related commodities in the destination for each category of overnight visitor. STVR: Short-term vacation rental.

Average Travel Spending by Overnight Visitors in Sonoma County, 2022*

	Visitor Spending (\$ Millions)	Travel Party Per Day	Travel Party Per Trip	Person Per Day	Person Per Trip	Length of Stay	Party Size
Hotel, Motel, STVR	1,239	\$743	\$2,026	\$297	\$805	2.7	2.5
Private Home	208	\$110	\$385	\$52	\$183	3.5	2.1
Other Overnight	211	\$209	\$643	\$79	\$240	3.1	2.7
All Overnight	1,659	\$362	\$1,119	\$153	\$466	3.1	2.4

*The spending figures shown represent expenditures on all travel related commodities in the destination for each category of overnight visitor. STVR: Short-term vacation rental.

Visitor Spending by Type of Commodity Purchased, 2018-2022 (\$ Millions)

	2018	2019	2020	2021	2022
Accommodations	\$510.2	\$504.7	\$289.9	\$576.0	\$656.6
Food Service	\$562.9	\$580.2	\$355.5	\$491.6	\$567.4
Food Stores	\$67.5	\$69.1	\$38.6	\$77.1	\$83.5
Local Transport/Gas	\$178.9	\$183.7	\$81.5	\$141.7	\$173.1
Arts/Entertainment/Recreation	\$352.9	\$354.4	\$194.6	\$271.4	\$305.9
Retail Sales	\$339.7	\$348.2	\$187.1	\$264.6	\$318.8
Visitor Air Transport	\$12.5	\$14.1	\$5.3	\$12.0	\$21.5
All Destination Spending	\$2,024	\$2,054	\$1,161	\$1,834	\$2,127

Notes:

- Totals may not add exactly due to rounding.
- Retail includes gasoline.
- Local tax receipts include transient occupancy tax, sales tax and passenger facility charges paid by visitors, and property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

State tax receipts include, sales tax and motor fuel tax payments paid by visitors, and income tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

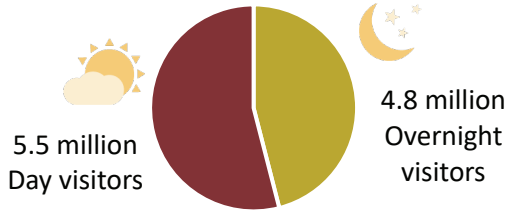


APPENDIX B: 2022 DOMESTIC VISITOR PROFILE

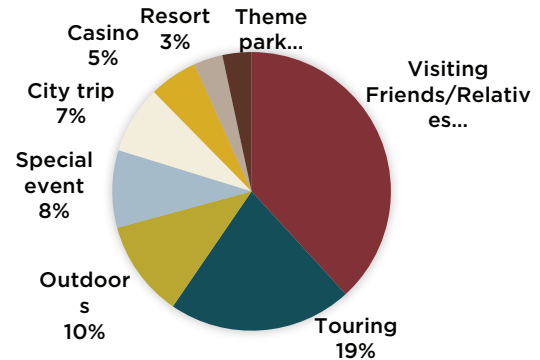
(Longwoods International)

Total visitors to Sonoma County

10.3 Million



Overall Purpose of Leisure Trip



Average Size of Overnight Travel Party



3.2 people

Average Length of Stay

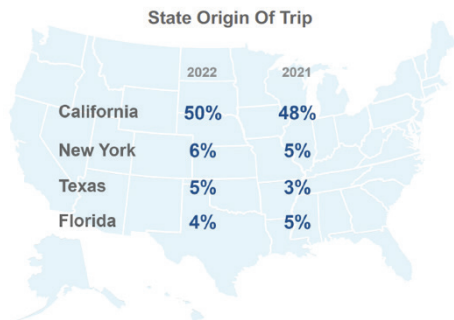


2.1 night

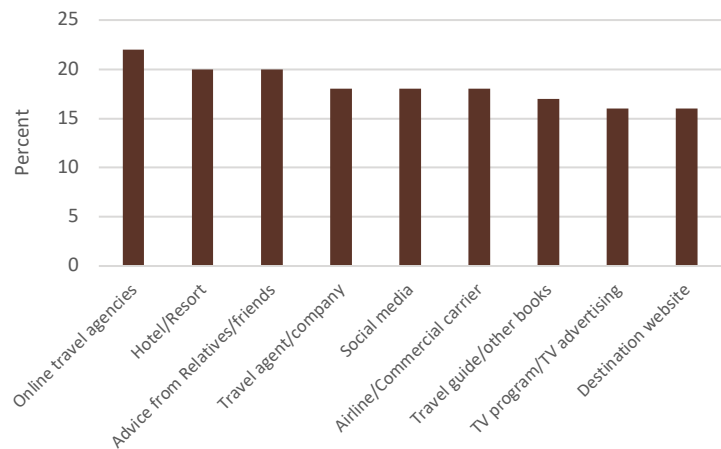
Season of Overnight Trip



Top Feeder States for Overnight Trips



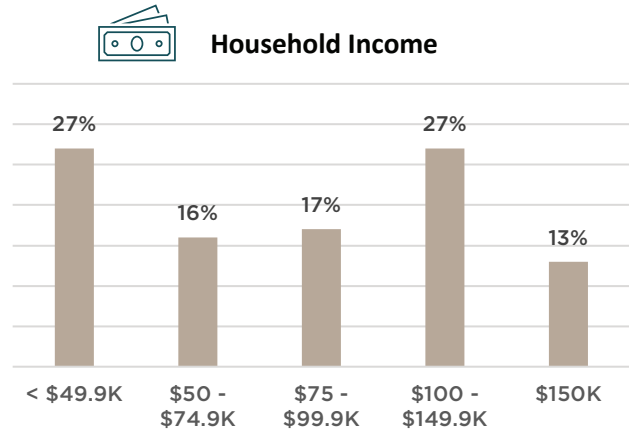
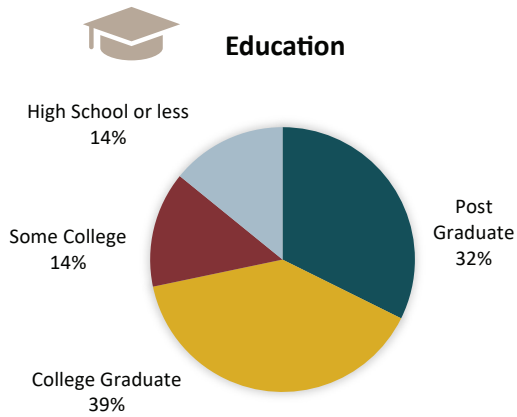
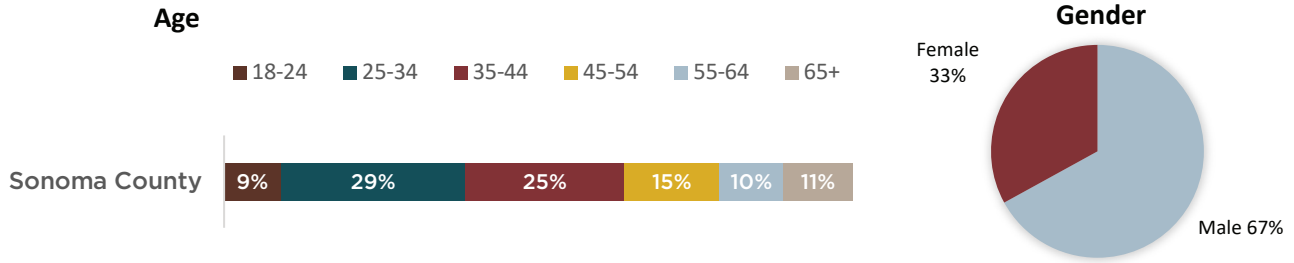
Trip Planning Information Sources



Top 10 Activities and Experiences for Overnight Trips



Demographic Profile of Overnight Visitors



Business Travel

Percent of Overnight Visitation related to Business Activities
31%

Business Visitor Spending

Business travelers spend twice as much as leisure travelers on a per transaction basis.

2x

Top Spending Categories

Top three categories for business visitor spending in Sonoma County **29%** are: Hotels and Lodging; Entertainment and Retail

International Visitors

Top International Origin Markets



Canada



Mexico



United Kingdom

Other top international origin markets:
Germany, Australia, France, India



4.3 days

Average length of stay



87%

Overnight visitors



Repeat visitors



OPEN

WINE TASTING • 10AM - 4:30PM

APPENDIX C
SONOMA COUNTY TOURISM BOARD OF DIRECTORS, STAFF

BIA Lodging Directors

- *Edward Roe, *Chair Fairmont Sonoma Mission Inn*
- * Brian Marchi, *DoubleTree by Hilton Sonoma Wine Country*
 - *Keo Hornbostel, *Treasurer Safari West*
 - * Bert Rangel, *Secretary, River's End Resort*
- Joe Bartolomei, *Vice Chair Farmhouse Inn*
- Thera Buttaro, *Bodega Bay & Beyond*
- Monica Hubert, *Hyatt Regency Sonoma Wine Country*
 - Crista Luedtke, *Boon Hotel + Spa*
 - Kirk Lok, *Quality Inn Petaluma*
- Brandon Mrkvicka, *Hampton Inn & Suites Windsor*
- Tony Pace, *Hotel E, Art House*

Board of Supervisors Appointees

- District 1: **Tim Zahner**, *Sonoma Valley Visitors Bureau*
- District 2: **Jennifer Buffo**, *Pure Luxury Transportation*
- District 3: **Scott Alonso**, *City of Santa Rosa*
- District 4: **Caroline Shaw**, *EJ Gallo*
- District 5: **Kirstyne Lang**, *KAL Consulting, LLC*
- District 5: **Margaret Grahame**, *Timber Cove Resort*

Ex-Officio Members

- Bill Arnone**, *Legal Counsel*
- Christina Rivera**, *County Administrator*
- McCall Miller**, *Alternate, County Administrator's Office*
- Ethan Brown**, *Interim Executive Director, Sonoma County Economic Development Board*
- Claudia Vecchio**, *CEO, Sonoma County Tourism*

* Board Officers

Sonoma County Tourism Staff

A.J. Ruiz, *Marketing & PR Coordinator*
Birgitt Vaughan, *Director of Public Relations*
Chris Vomvolakis, Sr. Manager, *Consumer Public Relations*
Claudia Vecchio, *President/CEO*
Conrad Braganza, *Sr. Manager, Research*
Delayna Fitzgerald, *Communications Manager*
Devin McConnell, *Sustainability & Climate Initiatives Manager*
Emma Schmitz, *Data & Systems Specialist*
Frank Filice, *Director of Brand Marketing*
India King, *Business Development Coordinator*
Morgan Miles, *Digital Marketing Manager*
Jamie Trump, *Content & Social Media Manager*
Jessica Quigley, *Executive Assistant*
Jonny Westom, *Vice President, Business Development*
Kate Davis, *Project & Design Specialist*
Kelly Bass Seibel, *Vice President, Community Engagement*
Kurt Shaver, *Destination Sales Manager*
Lisa Coats, *Accounting Assistant*
Lori Angstadt, *Vice President Finance & Operations*
Percy Stevens, *Director Travel Trade*
Stacey Bruckert, *Director Destination Sales*
Todd O'Leary, *Vice President, Marketing & Communications*
Tracy Koch, *Administrative Program Manager*

LAND ACKNOWLEDGEMENT

As an organization that resides in Sonoma County, Sonoma County Tourism aligns with the County of Sonoma in recognizing that we are on the ancestral lands of the Coast Miwok, Pomo and Wappo who are the original caretakers of this area. We respectfully acknowledge the Indigenous peoples who have been stewarding and maintaining their relationships on this land as knowledge keepers for millennia.





