









Transient Occupancy Tax Report 2014 **Third Quarter 2014**

COUNTY





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Transient Occupancy Tax Report

Third Quarter 2014

March 2015

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism (SCT), is pleased to bring you the 2014 third quarter calendar year (CY) Transient Occupancy Tax (TOT) Report. The analysis drafted by the Sonoma County EDB is based on reports from each jurisdiction within the county.

The report covers the county's TOT revenues, compared with Sonoma County's historical CY numbers, as well as the accommodation development for July, August and September of 2014.

Highlights from the Third Quarter Transient Occupancy Tax Report include:

- Sonoma County's revenues for third quarter 2014 increased 6% over third quarter 2013. Third quarter 2014 TOT revenues are the highest third quarter revenues since 2008, and in many cases the best that have ever been recorded.
- Nearly all Sonoma County Cities experienced increased year-over-year TOT revenue for third quarter 2014. Rohnert Park, Sebastopol, and Santa Rosa had the largest third quarter increases, all at 11%. These jumps in TOT revenues can be explained due to the possibility of increased reporting, as well as increased travel.

TOT Assessment by City:

County - 9%
 Cloverdale - 10%
 Healdsburg - 12%
 Petaluma - 10%
 Rohnert Park - 12%
 Santa Rosa - 9%
 Windsor - 12%

As always, if you have any questions, please feel free to contact us at (707) 565-7170.

Sincerely.

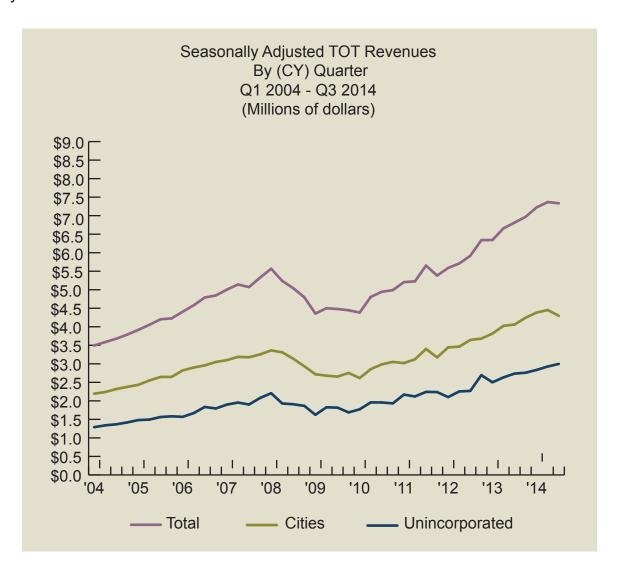
Ben Stone

Executive Director



Seasonally Adjusted TOT Revenues

By Calendar Year Quarter 2004 - 2014



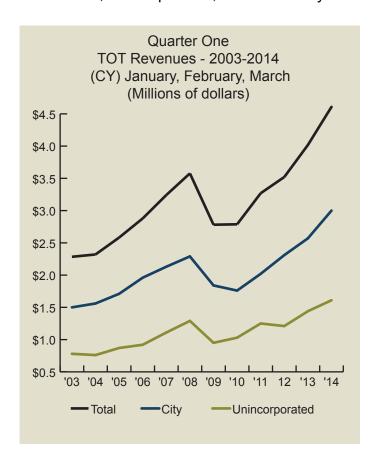
This section analyzes the quarterly TOT trends for the aggregated city and unincorporated areas from first quarter calendar year (CY) 2004 through third quarter (CY) 2014.

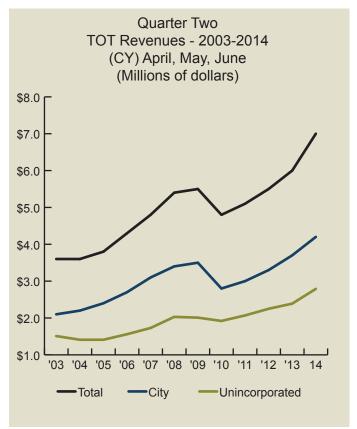
Summary of Findings:

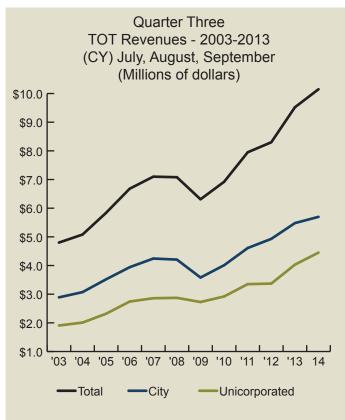
- TOT revenues grew steadily with significant increase between 2005 and 2007. Revenues decreased in 2008 and continued to do so into fourth quarter 2009. TOT revenues started to show growth in first quarter 2010 and show consistent increasing trends through third quarter 2014.
- The general trend in TOT revenues since 2004 reflects Sonoma County's popularity as a tourist destination and the strength of local lodging properties' average daily and occupancy rates. Recent growth rates continue to exceed those from 2005-2008, prior to the economic downturn.
- The significant dips in TOT revenues between 2008 and 2009 and between 2011 and 2012 can be attributed to decreased tourism worldwide in response to a weakening economy and/or reactions to specific events such as the global recession in 2011.

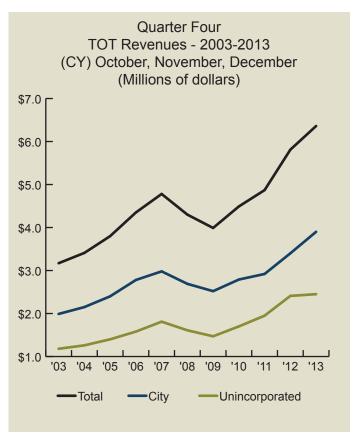
TOT Revenues by Quarter

Cities, Unincoporated, & Total County



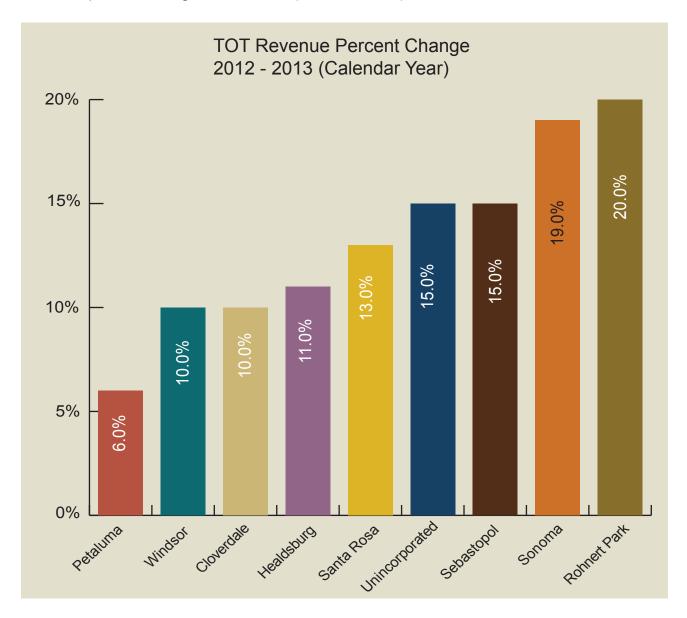






Annual TOT Trends

Annual percent change 2012 - 2013 (Calendar Year)



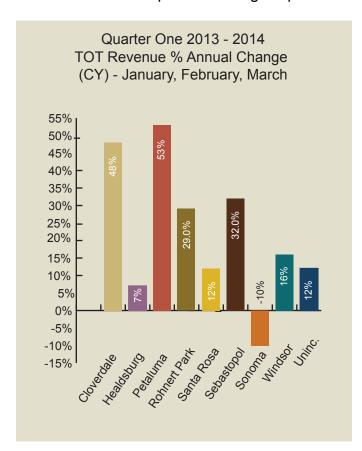
This section shows the annual percentage change in TOT revenues based on the most recent annual data (calendar year).

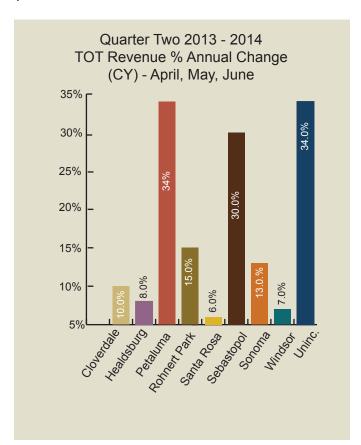
Summary of findings:

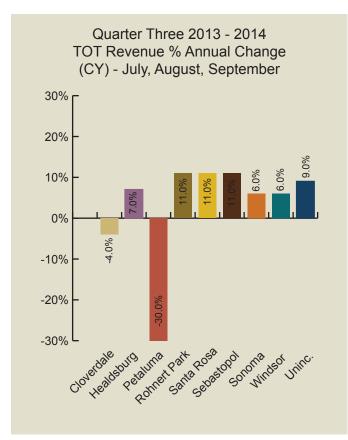
■ From 2012 - 2013, all cities and unincorporated areas of Sonoma County experienced positive growth in annual TOT revenue. Each city, and the county overall experienced higher growth rates in 2013 than in 2012. The overall growth rate for the entire county for 2012 over 2011 was 14%. This would indicate that overnight travel is returning to Sonoma County.

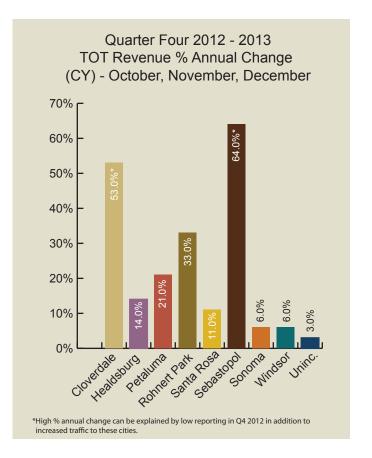
TOT Trends by Quarter

TOT Revenue percent change - quarter over quarter



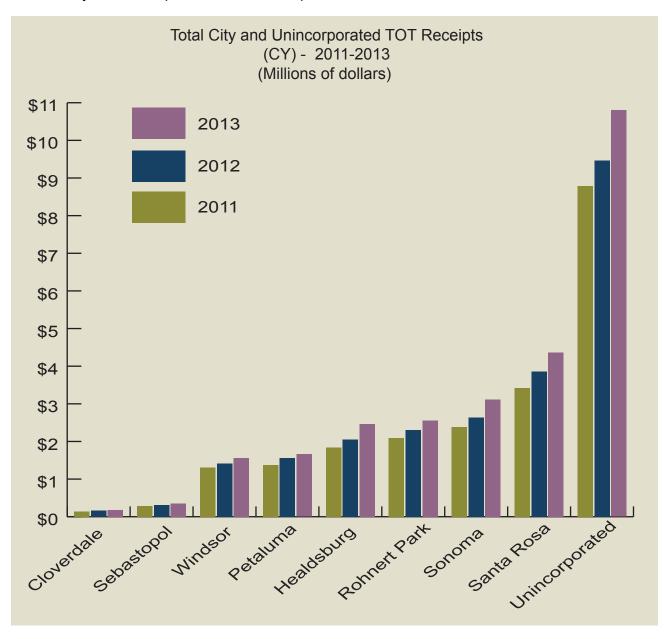






Annual City & Unincorporated TOT Receipts

Total City & Unincorporated TOT Receipts 2011 - 2013



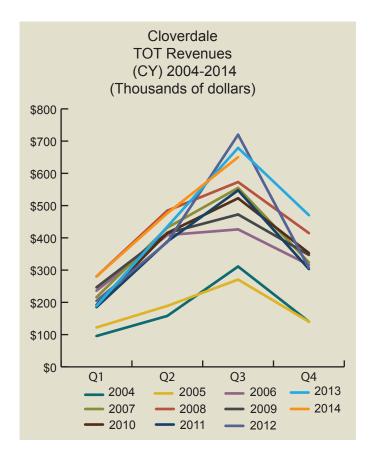
This section analyzes the year-over-year TOT revenue trends for each city and the unincorporated areas from calendar year (CY) 2011 - 2013.

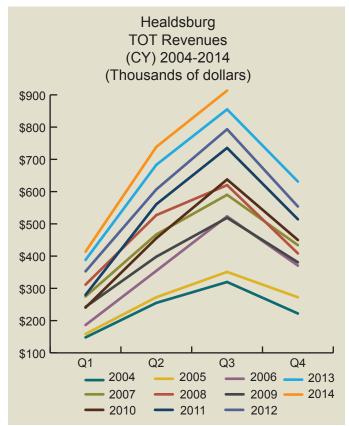
Summary of Findings:

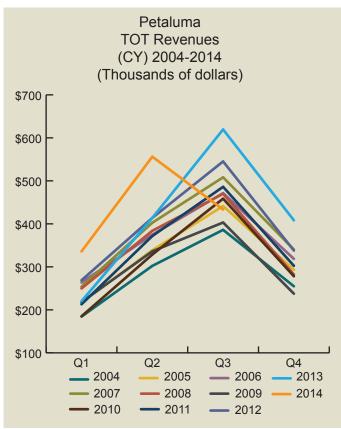
- The county as a whole experienced significant growth in year over year TOT revenues in 2013. County TOT revenues experienced a 13% growth from \$23.63 million in 2012 to \$27.05 million in 2013. This 13% growth is the largest single year growth since the downturn in 2008-2009.
- Rohnert Park experienced the greatest growth with a 17% increase from \$2.06 million in 2012 to \$2.5 million in 2012. However, the unincorporated areas and Santa Rosa had the highest revenues at \$10.8 million and \$4.4 million, respectively.
- It is important to note that travel to Sonoma County is cyclical and third quarter (July, August, September) provides a disproportionate share of Sonoma County's TOT revenues.

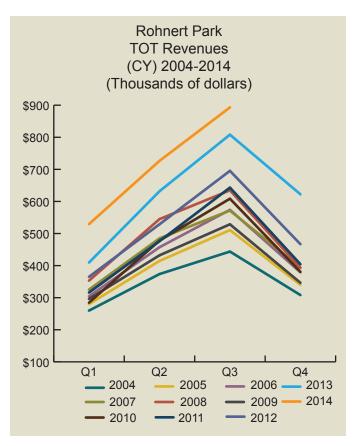
TOT Historical Comparison by City

Cloverdale, Healdsburg, Petaluma, Rohnert Park



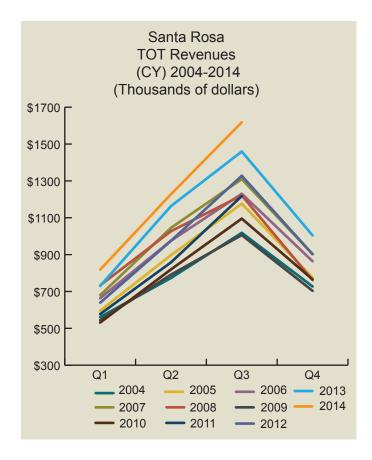


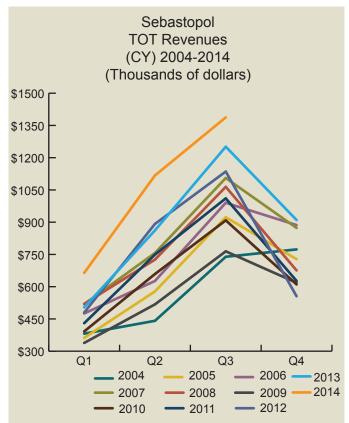


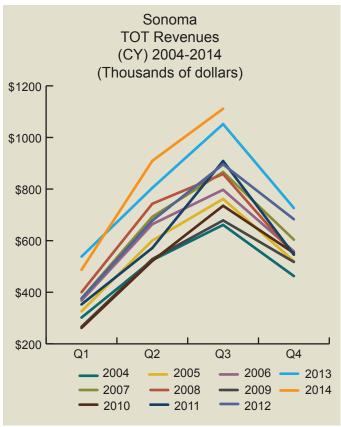


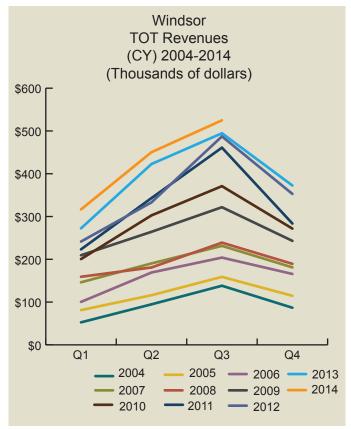
TOT Historical Comparison by City

Santa Rosa, Sebastopol, Sonoma, Windsor

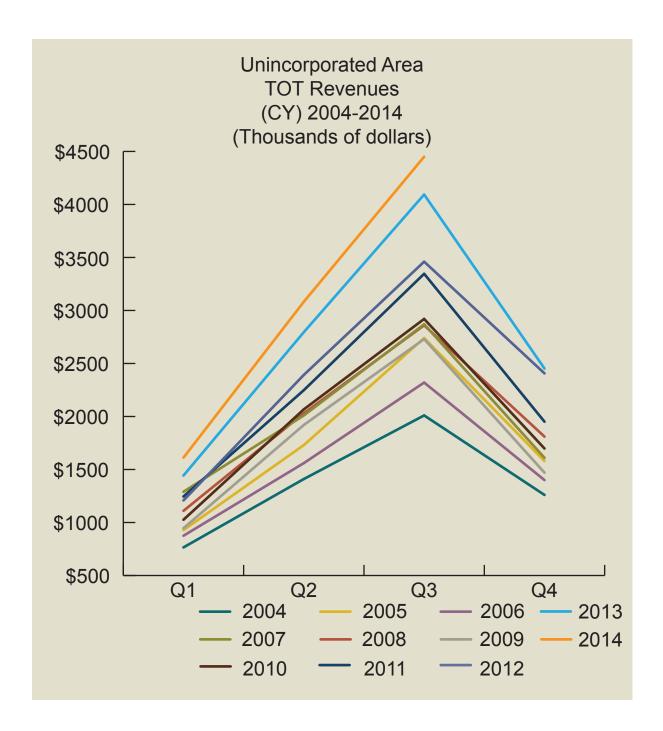








Unincorporated Area



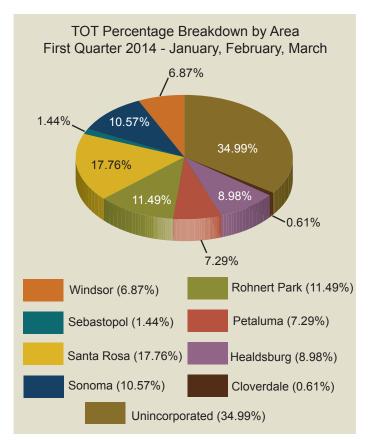
Data Table

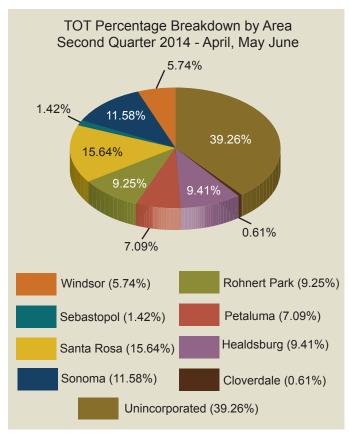
Historical TOT Figures

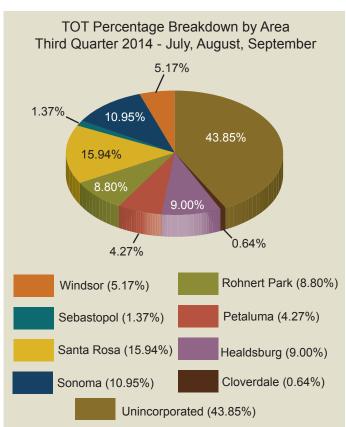
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2011			i							
Stotr Stot		\$7,705,506	\$140,293	\$1,765,190	\$1,250,340	\$1,731,370	\$3,211,000	\$200,975	\$2,070,310	\$1,140,079
2nd QTR. \$2,248,535 \$38,872 \$560,767 \$371,683 \$476,037 \$857,815 \$74,938 \$571,481 \$343,143 3rd QTR. \$3,346,902 \$54,742 \$735,373 \$486,115 \$643,120 \$1,217,602 \$101,079 \$908,591 \$461,011 4th QTR. \$1,951,855 \$30,328 \$514,165 \$302,368 \$404,315 \$774,822 \$62,679 \$545,717 \$283,596 TOTAL \$8,793,077 \$142,461 \$2,090,013 \$1,373,088 \$1,839,513 \$3,427,633 \$281,707 \$2,378,670 \$1,310,981 2012 \$1208,612 \$20,451 \$352,782 \$268,811 \$365,172 \$639,225 \$47,978 \$376,266 \$241,512 2nd QTR. \$2,391,897 \$38,695 \$606,790 \$413,880 \$528,735 \$974,865 \$89,201 \$677,555 \$333,094 4th QTR. \$2,370,828 \$30,643 \$553,803 \$337,904 \$466,776 \$902,002 \$55,563 \$683,024 \$352,831 TOTAL \$9,340,369 \$161,781 </td <td></td> <td>¢1 245 786</td> <td>¢10 510</td> <td>\$270.708</td> <td>\$212 022</td> <td>\$316.041</td> <td>\$577.304</td> <td>\$43.010</td> <td>\$252 882</td> <td>\$222 221</td>		¢1 245 786	¢10 510	\$270.708	\$212 022	\$316.041	\$577.304	\$43.010	\$252 882	\$222 221
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3rd QTR. \$3,369,032 \$71,993 \$793,361 \$545,145 \$695,365 \$1,327,717 \$113,550 \$895,755 \$487,306 4th QTR. \$2,370,828 \$30,643 \$553,803 \$337,904 \$466,776 \$902,002 \$55,563 \$683,024 \$352,831 TOTAL \$9,340,369 \$161,781 \$2,306,736 \$1,565,740 \$2,056,048 \$3,843,809 \$306,291 \$2,632,600 \$1,414,744 2013 \$10 TR. \$1,442,848 \$18,876 \$388,100 \$220,116 \$409,604 \$730,203 \$50,403 \$538,172 \$272,403 2nd QTR. \$2,791,138 \$43,474 \$683,079 \$413,881 \$631,677 \$1,166,691 \$86,192 \$804,583 \$422,690 3rd QTR. \$4,039,256 \$67,891 \$854,985 \$619,475 \$808,108 \$1,459,427 \$125,105 \$1,051,846 \$494,633 4th QTR. \$2,452,386 \$47,032 \$631,137 \$408,175 \$622,325 \$1,004,402 \$91,011 \$726,329 \$372,496 TOTAL \$10										
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2nd QTR. \$3,082,372 \$47,616 \$738,629 \$556,221 \$726,462 \$1,227,656 \$111,737 \$909,334 \$450,331 3rd QTR. \$4,450,953 \$65,031 \$913,236 \$433,317 \$893,146 \$1,617,906 \$138,740 \$1,111,409 \$524,916 4th QTR. \$1,227,656 \$111,737 \$909,334 \$450,331 \$524,916 \$524,916										
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4th QTR.		\$3,082,372	\$47,616	\$738,629	\$556,221	\$726,462	\$1,227,656	\$111,737	\$909,334	\$450,331
	3rd QTR.	\$4,450,953	\$65,031	\$913,236	\$433,317	\$893,146	\$1,617,906	\$138,740	\$1,111,409	\$524,916
TOTAL \$9,145,665 \$140,670 \$2,065,637 \$1,325,396 \$2,148,956 \$3,663,936 \$316,891 \$2,507,731 \$1,291,832	4th QTR.									
	TOTAL	\$9,145,665	\$140,670	\$2,065,637	\$1,325,396	\$2,148,956	\$3,663,936	\$316,891	\$2,507,731	\$1,291,832

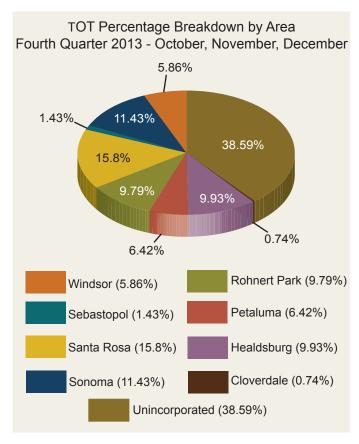
TOT Historical Percentage Breakdown by Area

Breakdown by Area for Past Four Quarters

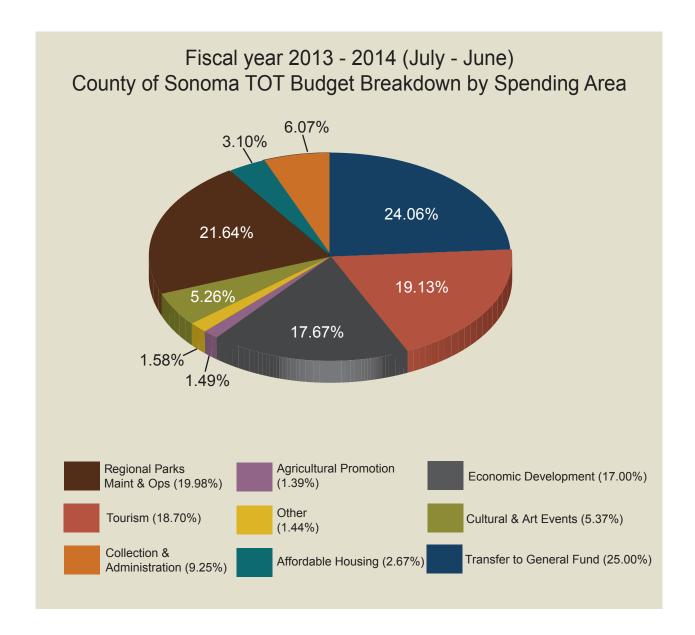






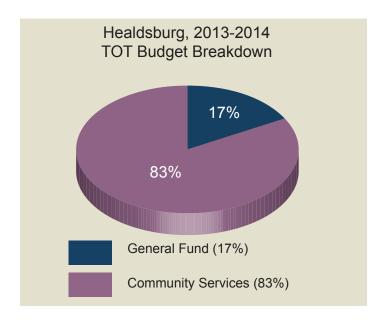


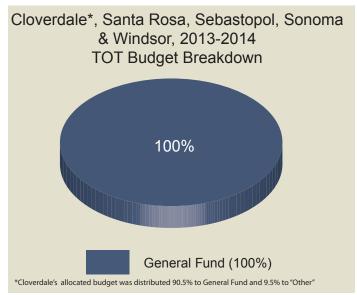
Sonoma County TOT Spending

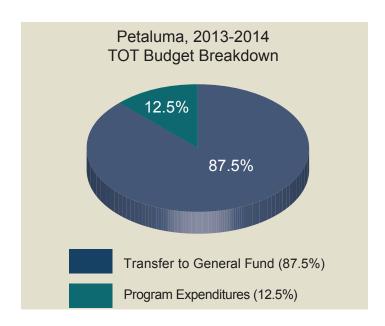


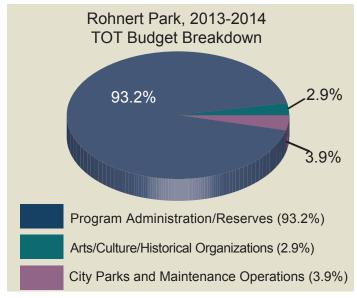
- TOT tax revenues are derived from a 9.0% tax on the rental of hotel and motel rooms, inn beds, and campgrounds in the unincorporated areas. (Revenues derived from this tax are subject to the Proposition 4 limit.)
- The proposed budget reflects the continuation of the Board of Supervisor's policy that 75% of the tax proceeds be allocated to the advertising fund and 25% of the proceeds be allocated to the county general fund.

TOT Spending Breakdown by City









- The General Fund provides funding for a wide range of city needs, including: Fire, Police, Planning & Building, Public Works, Administration, and Community Services.
- TOT Budget Breakdown by city is provided by each respective city's finance representative.

Industry Development

City Industry Development Update

This section provides information on current expansions and new lodging developments occurring in Sonoma County. All data contained within this section is sourced from the city planners of each jurisdiction.

Summary of Findings:

- Sonoma County currently has 25 lodging property applications in the approval process.
- When completed, current construction will add between 1,415 and 1,505 rooms to Sonoma County.

		velopment Tak		Rooms	Completion
Development Type	Project Name	Classifications	Address/Location	Proposed	-
City of Healdsburg					
New	H3	Hotel	227 Healdsburg Ave.	39	2016
New	Howling Wine Jaunts	Res Vis Lodging	602 College St.	1	2015
New	Saggio Hill	Luxury/Resort/Spa	91 Acres in N. Hbg.	130	2015
New	Garden Court Inn	Limited Service	146 Healdsburg Ave	23	N/A
New	The Wheelman House	Limited Service	223 Center Street	3	Unknown
New	The Kessler Collection	Luxury Hotel	230 Healdsburg Ave	75	Unknown
City of Petaluma					
New	Silk Mill Hotel	Full Service	450 Jefferson St	95	N/A
New	The Petaluman	Boutique Luxury	2 Petaluma Blvd S.	53	2015
New	Petaluma Riverfront Hotel	Focused Service		120	2016
City of Santa Rosa					
Expansion	Fountaingrove Inn	Full Service	3586 Mendocino Ave	22	N/A
New	Fairfield Inn	Full Service	111 Commercial Court	108	N/A
New	Holiday Inn Express Hotel	Limited Service	3745 Airway Drive	143	N/A
	and suites				
City of Sebastopol					
New	French Garden Inn	Limited Service	8050 Bodega Avenue	18	N/A
New	Barlow Hotel	Full Service	200 Morris Street	50	N/A
City of Sonoma					
New	Anderson Hotel	Full Service	541 First St. West	59	2017
City of Windsor					
New	Holiday Inn	Full Service	8755 Old Redwood Highway	100	2016

The above lodging properties are in various stages of completion. This report is meant to merely provide a 'snapshot' of their current status during the time this report was produced. The EDB and SCT will continue to update this information, quarterly, based on information from each jurisdiction.

Industry Development

Unincorporated Area Industry Development Update

Third Quarter 2014 Unincorporated Area Development Table

Development Type/ Project			Rooms	
Name	Lodging Classifications	Address/Location	Proposed	Completion Year (Est.)
New				
Sonoma Country Inn				
(Graywood Ranch)	Luxury/Resort	7945 Highway 12, Kenwood	50	Completion date unknown
Guernewood Park Resort	Luxury/Resort	17155 Highway 116, Guerneville	120	Completion date unknown
Thiessen- Forestville Plaza	Limited Service	Front St. & Hwy 116, Forestville	18	Completion date unknown
Be Here	Nature Retreat	3770 Langtry Road, Santa Rosa	9	2016
Expansion				
Sea Ranch Lodge	Luxury/Resort	60 Sea Walk Dr, Sea Ranch	40	Completion date unknown
/intner's Inn	Luxury/Resort	4300 Barnes Rd, Santa Rosa	36	Completion date unknown
Bodega Coast Inn	Limited Service	521 Highway 1, Bodega Bay	12	Completion date unknown
Ocean Song (Campsites)	Environmental Center	19999 Coleman Valley Rd, Bodega Bay	25	Completion date unknown
Kenwood Inn	Limited Service	10400 Hwy 12, Kenwood	6	Completion date unknown
Farmhouse Inn	Luxury/Resort	7871 River Road	7	2015
		New Room Totals	323	

The above lodging properties are in various stages of completion. This report is meant to merely provide a 'snapshot' of their current status during the time this report was produced. The EDB and SCTB will continue to update this information, quarterly, based on information from the Permit & Resource Management Department.



