# ECONOMIC DEVELOPMENT BOARD

## BOARD OF DIRECTORS

<table>
<thead>
<tr>
<th>PAM CHANTER, CHAIR</th>
<th>JORGE ALCAZAR</th>
<th>SKIP BRAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>TERRI DENTE</td>
<td>TERRY GARRETT</td>
<td>KATHRYN HECHT</td>
</tr>
<tr>
<td>WAYNE LEACH</td>
<td>MICHAEL NICHOLLS</td>
<td>MICHAEL TOMASINI</td>
</tr>
</tbody>
</table>

BEN STONE, Executive Director

## EDB FOUNDATION SPONSORS

### PRESENTING LEVEL

- Luther Burbank
- Exchange Bank
- SONOMA RACEWAY
- Redwood Credit Union
- KAISER PERMANENTE
- PURE LUXURY TRANSPORTATION
- tri counties bank

### FOUNDATION LEVEL

- Pacific Gas and Electric Company

### PREMIER LEVEL

- City of Santa Rosa
- Bank of Marin

### EXECUTIVE LEVEL

- AMERICAN AGCREDIT
- AMERICAN RIVER BANK
- COMCAST
- GEORGE PETERSEN INSURANCE
- KEEGAN & COPPIN CO.
- MIDSTATE CONSTRUCTION
- NORBAR
- SONOMA COUNTY ALLIANCE
- SUMMIT STATE BANK
- VANTREO INSURANCE
- ZAINER RINEHART CLARKE

### MEDIA LEVEL

- Sonoma County Business Journal

- Board of Supervisors

- Sonoma County Board of Supervisors
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21. SOURCES, METHODOLOGY & ACKNOWLEDGMENTS
FOURTH QUARTER 2016

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism (SCT), is pleased to bring you the 2016 fourth 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. This report contains the most recent data available based on county reporting.

The report covers the county’s TOT revenues, compared with Sonoma County’s historical CY numbers, and the accommodation development report for October, November and December of 2016.

TOT ASSESSMENT BY CITY

<table>
<thead>
<tr>
<th>City</th>
<th>TOT</th>
<th>City</th>
<th>TOT</th>
<th>City</th>
<th>TOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloverdale</td>
<td>10%</td>
<td>Rohnert Park</td>
<td>12%</td>
<td>Sonoma</td>
<td>10%</td>
</tr>
<tr>
<td>Healdsburg</td>
<td>12%</td>
<td>Santa Rosa</td>
<td>9%</td>
<td>Windsor</td>
<td>12%</td>
</tr>
<tr>
<td>Petaluma</td>
<td>10%</td>
<td>Sebastopol</td>
<td>10%</td>
<td>Unincorporated County</td>
<td>9%</td>
</tr>
</tbody>
</table>

HIGHLIGHTS

- Sonoma County’s revenues for fourth quarter 2016 increased 18% over fourth quarter 2015.
- All Sonoma County cities, except Cloverdale and Sonoma, experienced increased year-over-year TOT revenue for fourth quarter 2016. The unincorporated areas had the largest fourth quarter increase at 39%. Healdsburg had the next largest increase at 11%.
- All cities, except Cloverdale and Sonoma recorded their best fourth quarter TOT revenues to date. This reflects improving economic conditions and highlights Sonoma County’s growing popularity as a tourist destination.

For questions, please call (707) 565-7170
SEASONALLY ADJUSTED TOT REVENUES

BY CALENDAR YEAR
Q1 2005 - Q4 2016

This section analyzes the quarterly TOT trends for the aggregated city, unincorporated areas, and total county from first quarter 2005 through fourth quarter 2016.

SUMMARY OF FINDINGS

TOT revenues grew steadily 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 fourth quarter 2016.

The general trend in TOT revenues since 2005 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.

Source: Sonoma County and Cities Finance Departments
TOTAL TOT REVENUE BY QUARTER

**Historical Overview**

**Quarter One**
TOT Revenues 2004-2016 (Millions of Dollars)

**Quarter Two**
TOT Revenues 2004-2016 (Millions of Dollars)

**Quarter Three**
TOT Revenues 2004-2016 (Millions of Dollars)

**Quarter Four**
TOT Revenues 2004-2016 (Millions of Dollars)

Source: Sonoma County and City Finance Departments
ANNUAL TOT TRENDS

ANNUAL TOT PERCENT CHANGE

2015-2016

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

Summary of Findings

From 2015 - 2016, all cities and the unincorporated areas of Sonoma County experienced positive growth in annual TOT revenue. The overall growth rate for the entire county from 2015 to 2016 was 11.57%. This indicates that overnight travel continues to grow in Sonoma County.
TOT TRENDS BY QUARTER

TOT REVENUE PERCENT CHANGE
Quarter over Quarter

Q1, 2015-2016
January, February, March

Q2, 2015-2016
April, May, June

Q3, 2015-2016
July, August, September

Q4, 2015-2016
October, November, December

Source: Sonoma County and City Finance Departments
ANNUAL TOT RECEIPTS

TOTAL CITY AND UNINCORPORATED TOT RECEIPTS

2013-2016 (Calendar Year)

This section analyzes the year-over-year TOT revenue trends for each city and the unincorporated areas from calendar year (CY) 2013 - 2016.

Summary of Findings:

The county as a whole experienced significant growth in year-over-year TOT revenues in 2016. County TOT revenues experienced an 11.57% growth from $33.6 million in 2015 to $37.5 million in 2016. The unincorporated areas and Santa Rosa had the highest revenues at $15.97 million and $6.07 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.
CLOVERDALE, HEALDSBURG, PETALUMA, ROHNERT PARK
Q1 2005 to Q4 2016

Cloverdale TOT Revenues
Thousands of Dollars

Healdsburg TOT Revenues
Thousands of Dollars

Petaluma TOT Revenues
Thousands of Dollars

Rohnert Park TOT Revenues
Thousands of Dollars

Source: Cloverdale Finance Department

Source: Healdsburg Finance Department

Source: Petaluma Finance Department

Source: Rohnert Park Finance Department
TOT HISTORICAL COMPARISON

SANTA ROSA, SEBASTOPOL, SONOMA, WINDSOR
Q1 2005-Q4 2016

Santa Rosa TOT Revenues
Thousands of Dollars

$2000
$1750
$1500
$1250
$1000
$750
$500
$250
Q1 Q2 Q3 Q4

2005 2006 2007 2008
2009 2010 2011 2012
2013 2014 2015 2016

Source: Santa Rosa Finance Department

Sebastopol TOT Revenues
Thousands of Dollars

$200
$150
$100
$50
$0
Q1 Q2 Q3 Q4

2005 2006 2007 2008
2009 2010 2011 2012
2013 2014 2015 2016

Source: Sebastopol Finance Department

Sonoma TOT Revenues
Thousands of Dollars

$1200
$1000
$800
$600
$400
$200
Q1 Q2 Q3 Q4

2005 2006 2007 2008
2009 2010 2011 2012
2013 2014 2015 2016

Source: Sonoma Finance Department

Windsor TOT Revenues
Thousands of Dollars

$600
$500
$400
$300
$200
$100
$0
Q1 Q2 Q3 Q4

2005 2006 2007 2008
2009 2010 2011 2012
2013 2014 2015 2016

Source: Windsor Finance Department
TOT HISTORICAL COMPARISON

UNINCORPORATED AREA
Q1 2005 - Q4 2016

Unincorporated Area TOT Revenues
Thousands of Dollars

Source: Sonoma County Auditor-Controller/ Treasurer-Tax Collector
## Historical Tot Figures: First Quarter 2008 to Fourth Quarter 2016

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$7,790,934</td>
<td>$1,395,271</td>
<td>$2,496,762</td>
<td>$2,541,932</td>
<td>$1,457,069</td>
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<tr>
<td></td>
<td>$455,315</td>
<td>$329,472</td>
<td>$732,276</td>
<td>$818,474</td>
<td>$436,279</td>
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<tr>
<td>2009</td>
<td>$1,298,874</td>
<td>$321,526</td>
<td>$424,455</td>
<td>$217,974</td>
<td>$296,290</td>
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<tr>
<td></td>
<td>$33,189</td>
<td>$544,457</td>
<td>$26,304</td>
<td>$51,991</td>
<td>$400,313</td>
</tr>
<tr>
<td>2010</td>
<td>$949,598</td>
<td>$242,658</td>
<td>$424,455</td>
<td>$217,974</td>
<td>$296,290</td>
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<tr>
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<td>$47,032</td>
<td>$544,457</td>
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<tr>
<td>2011</td>
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<td>$242,658</td>
<td>$424,455</td>
<td>$217,974</td>
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<td>$51,991</td>
<td>$400,313</td>
</tr>
</tbody>
</table>

### Notes
- First Quarter 2008 to Fourth Quarter 2016
- Tot figures include all data points from the specified periods.
TOT BREAKDOWN BY AREA

PERCENTAGE BREAKDOWN
Past Four Quarters

Source: Sonoma County and Cities Finance Departments
TOT SPENDING BREAKDOWN

**Unincorporated Area**

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.

![County of Sonoma TOT Budget Breakdown](chart.png)
CITY TOT SPENDING

TOT SPENDING BREAKDOWN

By City
TOT tax revenues are derived from taxes on the rental of hotel and motel rooms, inn beds, and campgrounds in Sonoma County cities. The General Fund provides funding for a wide range of city needs, including:

- Fire
- Police
- Planning and Building
- Public Works
- Administration
- Community Services

TOT budget breakdowns are provided by each respective city’s finance department.

Most cities allocate all TOT revenue to the general fund. Healdsburg and Petaluma also allocate revenue to additional categories, including Community Services, Collection and Administration, and Cultural and Art Events.

<table>
<thead>
<tr>
<th>TOT Budget Breakdown</th>
<th>Healdsburg</th>
<th>2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Community Services (83%)</td>
<td>General Fund (17%)</td>
</tr>
</tbody>
</table>

Source: Sonoma County and Cities Finance Departments

<table>
<thead>
<tr>
<th>TOT Budget Breakdown</th>
<th>Petaluma</th>
<th>2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Collection and Administration (13%)</td>
<td>Cultural and Art Events (14%)</td>
</tr>
</tbody>
</table>

Source: Sonoma County and Cities Finance Departments
Sonoma County currently has 37 lodging property applications in the approval process. When completed, 2250 rooms will be added to Sonoma County.

<table>
<thead>
<tr>
<th>Development Type</th>
<th>Project Name</th>
<th>Lodging Type</th>
<th>Address/Location</th>
<th>Rooms Proposed</th>
<th>Completion Year (Est.)</th>
<th>Comments</th>
<th>Use Permit Approved (Date) and Hearing Body</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unincorporated Area</td>
<td>Be Here Now Nature Lodging Retreat</td>
<td>3770 Langtry Road, Santa Rosa</td>
<td>9</td>
<td>Unknown</td>
<td>Under construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expansion</td>
<td>Sea Ranch Lodge Luxury/Resort</td>
<td>60 Sea Walk Drive, Sea Ranch</td>
<td>40</td>
<td>Unknown</td>
<td>Vested and not constructed</td>
<td>They have not met the conditions of approval</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Sonoma Country Inn (Graywood Ranch) Luxury/Resort</td>
<td>7945 Highway 12, Kenwood</td>
<td>50</td>
<td>Unknown</td>
<td>They anticipate opening in 2019</td>
<td>Appealed. The appeal is scheduled for this summer. Addendum to the EIR (Environmental Impact Report)</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Guernewood Park Resort Luxury/Resort</td>
<td>17155 Highway 116, Guerneville</td>
<td>120</td>
<td>Unknown</td>
<td>Project was taken off the calendar from BZA and will be brought back at a later date.</td>
<td>Applicant must submit materials related to site design which will be followed by County recirculation of the Environmental Initial Study</td>
<td></td>
</tr>
<tr>
<td>Expansion</td>
<td>Bodega Coast Inn Limited Service</td>
<td>521 Highway 1, Bodega Bay</td>
<td>12</td>
<td>Unknown</td>
<td>Expired and not constructed</td>
<td>Expired and not constructed</td>
<td>Under review with Code Enforcement</td>
</tr>
<tr>
<td>Expansion</td>
<td>Ocean Song Campsites Ca(Campsites) Environmental Center</td>
<td>19999 Coleman Valley Road</td>
<td>25</td>
<td>Unknown</td>
<td>Incomplete</td>
<td>Under review with Code Enforcement</td>
<td></td>
</tr>
<tr>
<td>Expansion</td>
<td>Cloverleaf Ranch Luxury/Resort</td>
<td>3886 Old Redwood Hwy, Santa Rosa</td>
<td>31</td>
<td>Unknown</td>
<td>Renovation and expansion of camp and event center</td>
<td>Incomplete application</td>
<td></td>
</tr>
<tr>
<td>Expansion</td>
<td>None RV/ Campground</td>
<td>16590 Hwy 116, Guerneville</td>
<td>34</td>
<td>Unknown</td>
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<tr>
<td>Expansion</td>
<td>Pocket Ranch Retreat</td>
<td>22000 Pocket Ranch Rd</td>
<td>24</td>
<td>2017</td>
<td>Applied for new use permit</td>
<td>Not active. Project has been petitioned. Staff is drafting the Mitigated Negative Declaration</td>
<td></td>
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<tr>
<td>New</td>
<td>Camp Out Back Campground</td>
<td>16101 Neeley Road, Forestville</td>
<td>20</td>
<td>Unknown</td>
<td>Application not officially approved</td>
<td>Under review by Code Enforcement</td>
<td></td>
</tr>
</tbody>
</table>

Lodging properties in this section 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. Projects still under construction from previous reports are also represented above. Lodging properties that have been announced but are not in the approval process are not included.
## INDUSTRY DEVELOPMENT

### CITY LODGING DEVELOPMENTS

**Healdsburg, Petaluma, and Rohnert Park**

**Q4 2016 Updates**

<table>
<thead>
<tr>
<th>Development Type</th>
<th>Project Name</th>
<th>Lodging Type</th>
<th>Address/Location</th>
<th>Rooms Proposed</th>
<th>Completion Year (Est.)</th>
<th>Comments</th>
<th>Use Permit Approved (Date) and Hearing Body</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Healdsburg</td>
<td>New H3 Hotel</td>
<td>Hotel</td>
<td>227 Healdsburg Ave</td>
<td>39</td>
<td>Unknown</td>
<td></td>
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<tr>
<td></td>
<td>New Howling Wine Jaunts</td>
<td>Res Vis Lodging</td>
<td>602 College St.</td>
<td>1</td>
<td>Unknown</td>
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</tr>
<tr>
<td></td>
<td>New Saggio Hill Resort Spa</td>
<td>Luxury, Resort, Spa</td>
<td>91 Acres in N. Healdsburg</td>
<td>130</td>
<td>Unknown</td>
<td></td>
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<tr>
<td></td>
<td>New Garden Court Inn</td>
<td>Limited Service</td>
<td>146 Healdsburg Ave</td>
<td>23</td>
<td>Unknown</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>New The Kessler Collection</td>
<td>Luxury Hotel</td>
<td>230 Healdsburg Ave</td>
<td>75</td>
<td>Unknown</td>
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<tr>
<td></td>
<td>New Healdsburg Suites Hotel</td>
<td>Hotel</td>
<td>110 Dry Creek Road</td>
<td>122</td>
<td>Unknown</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>New The Wheelman House</td>
<td>Limited Service</td>
<td>223 Center Street</td>
<td>3</td>
<td>Unknown</td>
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<tr>
<td>City of Petaluma</td>
<td>New Silk Mill Hotel</td>
<td>Full Service</td>
<td>450 Jefferson St.</td>
<td>76</td>
<td>Unknown</td>
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<td></td>
<td>New The Petaluman Boutique</td>
<td>Limited Service</td>
<td>2 Petaluma Blvd S.</td>
<td>54</td>
<td>Unknown</td>
<td>Inactive application</td>
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<td></td>
<td>New Riverfront Courtyard Marriott Hotel</td>
<td>Focused Service</td>
<td>500 Hopper Street</td>
<td>122</td>
<td>Unknown</td>
<td>City pending review</td>
<td></td>
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<tr>
<td>City of Rohnert Park</td>
<td>New Fairfield Inn and Suites</td>
<td>Full Service</td>
<td>405 Martin Avenue</td>
<td>100</td>
<td>Unknown</td>
<td>Architectural Review application</td>
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<td></td>
<td>New Cambria Hotel and Suites</td>
<td>Full Service</td>
<td>5870 Labath</td>
<td>132</td>
<td>Mid-2018</td>
<td>Part of Five Creek Project</td>
<td></td>
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<tr>
<td></td>
<td>New Oxford Suites</td>
<td>Full Service</td>
<td>67 Golf Course Drive</td>
<td>163</td>
<td>Summer 2017</td>
<td>General Plan Amendments, Final Development Plan, and Zoning Amendments approved January 10, 2017</td>
<td></td>
</tr>
</tbody>
</table>
## INDUSTRY DEVELOPMENT

### CITY LODGING DEVELOPMENTS
Santa Rosa, Sonoma, Windsor, and Sebastopol
Q4 2016 Updates

<table>
<thead>
<tr>
<th>Development Type</th>
<th>Project Name</th>
<th>Lodging Type</th>
<th>Address/Location</th>
<th>Rooms Proposed</th>
<th>Completion Year (Est.)</th>
<th>Comments</th>
<th>Use Permit Approved (Date) and Hearing Body</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Santa Rosa</td>
<td>Expansion Hyatt Vineyard Creek Hotel</td>
<td>Full Service</td>
<td>170 Railroad Street</td>
<td>100</td>
<td>Summer 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Spinster Inn</td>
<td>Limited Service</td>
<td>407 South A Street</td>
<td>9</td>
<td>2018</td>
<td></td>
<td>8/6/2015 Zoning Administrator</td>
</tr>
<tr>
<td></td>
<td>New Courthouse Square Hotel</td>
<td>Full Service</td>
<td>19,25,37 Old Courthouse Square</td>
<td>62</td>
<td>2018</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>New AC Hotel by Marriott</td>
<td>Limited Service</td>
<td>210 5th Street</td>
<td>142</td>
<td>2018</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>New Astro Motel</td>
<td>Limited Service</td>
<td>323 Santa Rosa Ave</td>
<td>34</td>
<td>2017</td>
<td>Renovation/reoccupation of existing, previously operating motel</td>
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<tr>
<td></td>
<td>New Residence Inn by Marriott</td>
<td>Limited Service</td>
<td>3558 Round Barn Circle</td>
<td>115</td>
<td>2018</td>
<td></td>
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<tr>
<td></td>
<td>New Inn at Santa Rosa</td>
<td>Limited Service</td>
<td>111 Commercial Court</td>
<td>100</td>
<td>2018</td>
<td>11/17/2016 Zoning Administrator</td>
<td></td>
</tr>
<tr>
<td>City of Sonoma</td>
<td>New Hotel Project Sonoma</td>
<td>Hotel w/ Spa and Restaurant</td>
<td>153 West Napa St. &amp; 541 First St. West</td>
<td>62</td>
<td>2017</td>
<td>Application under review. Certification of EIR appealed to City Council</td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Hawker Sonoma</td>
<td>Boutique Hotel</td>
<td>158-172 West Napa St.</td>
<td>7</td>
<td>2017</td>
<td>Under Construction. Use Permit approved by Planning Commission on 10/13/16</td>
<td></td>
</tr>
<tr>
<td></td>
<td>New First Street East Project</td>
<td>Hotel w/ Spa and Café</td>
<td>254 First St. East, 273-299 Second St. East</td>
<td>30</td>
<td>2018</td>
<td>Application under review</td>
<td></td>
</tr>
<tr>
<td>City of Windsor</td>
<td>New Holiday Inn</td>
<td>Full Service</td>
<td>8755 Old Redwood Highway</td>
<td>100</td>
<td>Unknown</td>
<td>Under construction</td>
<td></td>
</tr>
<tr>
<td>City of Sebastopol</td>
<td>New French Garden Inn</td>
<td>Limited Service</td>
<td>8050 Bodega Avenue</td>
<td>18</td>
<td>2019</td>
<td>Use Permit approved</td>
<td>No building permits issued</td>
</tr>
<tr>
<td></td>
<td>New Hotel Sebastopol</td>
<td>Boutique hotel</td>
<td>6828 Depot Street</td>
<td>66</td>
<td>2018</td>
<td>Obtained city approval</td>
<td></td>
</tr>
</tbody>
</table>
SOURCES

City data is provided by the finance and planning departments of Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, and Windsor. County TOT revenue figures are provided by the Sonoma County Auditor-Controller / Treasurer-Tax Collector. County industry developments are provided by the Permit Resource and Management Department.

METHODOLOGY

Total, city, and unincorporated area TOT revenues are seasonally adjusted using X-13ARIMA-SEATS, which is a seasonal adjustment software produced, distributed, and maintained by the U.S. Census Bureau. Seasonal adjustments are only made for page 6 of this report. All other data figures are unadjusted.

A calendar year runs from January to December. Each quarter contains three months of the year, beginning with January, February and March for the first quarter. A fiscal year runs from July to June. Please note that this report contains data updated through the fourth quarter (October, November, December) of calendar year 2016, and contains the most recent data available based on county reporting.

All information contained within this report was obtained from sources believed to be accurate, but Sonoma County Tourism (SCT) and the Economic Development Board (EDB) do not guarantee that it is accurate or complete. This report is intended for informational purposes only and does not represent an endorsement of any proposed project by the SCT or EDB or any of their employees, affiliates, or members.

ACKNOWLEDGMENTS

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Thank you to the finance and planning departments of Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, and Windsor for providing TOT revenue figures and industry updates for Sonoma County cities. Thank you to the Permit and Resource Management Department (PRMD) and the Sonoma County Auditor-Controller / Treasurer-Tax Collector office for providing information for the unincorporated areas of Sonoma County.