FIRST QUARTER TRANSIENT OCCUPANCY TAX REPORT

INDUSTRY REPORT 2018
ECONOMIC DEVELOPMENT BOARD

BOARD OF DIRECTORS
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SONOMA RACEWAY
City of Santa Rosa
Redwood Credit Union
Exchange Bank
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tri counties bank

PREMIER LEVEL

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EXECUTIVE LEVEL

AMERICAN RIVER BANK ▪ COMCAST ▪ KEEGAN & COPPIN CO.
MIDSTATE CONSTRUCTION ▪ MORGAN STANLEY

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Sonoma County Board of Supervisors

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EXECUTIVE SUMMARY

FIRST QUARTER 2018

The Sonoma County Economic Development Board (EDB), in partnership with Sonoma County Tourism (SCT), is pleased to bring you the 2018 first 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 January, February, and March of 2018.

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>14%</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>12%</td>
</tr>
</tbody>
</table>

HIGHLIGHTS

• Sonoma County’s revenues for first quarter 2018 increased 30% over first quarter 2017. Total county revenues equalled $9.22 million.

• All Sonoma County cities, experienced increased year-over-year TOT revenue for first quarter 2018. Windsor had the largest first quarter increase at 38%. The unincorporated areas had the next largest increase at 35%.

• All cities, except Cloverdale and Sonoma recorded their best first 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 2006 - Q1 2018

This section analyzes the quarterly TOT trends for the aggregated city, unincorporated areas, and total county from first quarter 2006 through first quarter 2018.

SUMMARY OF FINDINGS

TOT revenues began to show steady growth in first quarter 2010. The general trend in TOT revenues since 2006 reflects Sonoma County’s popularity as a tourist destination and the strength of local lodging properties’ average daily and occupancy rates.

Revenues were variant in 2017, particularly in quarter four as a result of the October wildfires. First quarter 2018 revenues exhibited similar patterns in first quarter 2010 and 2015, with a decrease in cities and an increase in unincorporated revenues. Damaged and destroyed hotels from the fires will have effects on TOT revenue in the near future.
TOT REVENUES BY QUARTER

TOTAL TOT REVENUE BY QUARTER

Historical Overview

Quarter One
TOT Revenues 2006-2018 (Millions of Dollars)

Quarter Two
TOT Revenues 2005-2017 (Millions of Dollars)

Quarter Three
TOT Revenues 2005-2017 (Millions of Dollars)

Quarter Four
TOT Revenues 2005-2017 (Millions of Dollars)

Source: Sonoma County and City Finance Departments
ANNUAL TOT TRENDS

ANNUAL TOT PERCENT CHANGE

2017-2018

This section shows the annual percentage change in TOT revenues based on the most recent fiscal year data (2016-2017).

Summary of Findings

From 2016 - 2017, 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 2016 to 2017 was 11.57%. This indicates that overnight travel continues to grow in Sonoma County.

Q1 2018’s 30% growth rate from Q1 2017 adds to this increase over the past 12 months.
TOT TRENDS BY QUARTER

TOT REVENUE PERCENT CHANGE
Quarter over Quarter

Quarter One 2017-2018
January, February, March

Quarter Two 2016-2017
April, May, June

Quarter Three 2016-2017
July, August, September

Quarter Four 2016-2017
October, November, December

Source: Sonoma County and City Finance Departments

Source: Sonoma County and City Finance Departments
ANNUAL TOT RECEIPTS

TOTAL CITY AND UNINCORPORATED TOT RECEIPTS

2014-2017 (Calendar Year)

This section analyzes the year-over-year TOT revenue trends for each city and the unincorporated areas from calendar year (CY) 2014 - 2017.

Summary of Findings:
The county as a whole experienced significant growth in the year-over-year TOT revenues in 2017. County TOT revenues experienced a 16.53% growth from $37.5 million in 2016 to $43.7 million in 2017.

Q1 2018 built upon this growth, with seven out of nine areas achieving all time high TOT collections.

![Bar chart showing Total City & Unincorporated TOT Receipts (Calendar Year 2014-2017)]
TOT HISTORICAL COMPARISON

CLOVERDALE, HEALDSBURG, PETALUMA, ROHNERT PARK
Q1 2007 to Q1 2018

Source: Sonoma County and City Finance Departments
TOT HISTORICAL COMPARISON

SANTA ROSA, SEBASTOPOL, SONOMA, WINDSOR
Q1 2007-Q1 2018

Santa Rosa TOT Revenues
Thousands of Dollars

Sebastopol TOT Revenues
Thousands of Dollars

Sonoma TOT Revenues
Thousands of Dollars

Windsor TOT Revenues
Thousands of Dollars

Source: Santa Rosa Finance Department
Source: Sebastopol Finance Department
Source: Sonoma Finance Department
Source: Windsor Finance Department
TOT HISTORICAL COMPARISON

UNINCORPORATED AREA
Q1 2007 - Q1 2018

Unincorporated Area TOT Revenues
Thousands of Dollars

Source: Sonoma County Auditor-Controller/Treasurer-Tax Collector
## DATA TABLE

### HISTORICAL TOT FIGURES

First Quarter 2010 to First Quarter 2018

<table>
<thead>
<tr>
<th>Year</th>
<th>UNINCORP.</th>
<th>CLOVERDALE</th>
<th>HEALDSBURG</th>
<th>PETALUMA</th>
<th>ROHNERT PARK</th>
<th>SANTA ROSA</th>
<th>SEBASTOPOL</th>
<th>SONOMA</th>
<th>WINDSOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$1,025,729</td>
<td>$19,191</td>
<td>$240,268</td>
<td>$185,020</td>
<td>$284,473</td>
<td>$531,501</td>
<td>$39,194</td>
<td>$261,783</td>
<td>$200,478</td>
</tr>
<tr>
<td>1st QTR.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd QTR.</td>
<td>$2,066,768</td>
<td>$41,532</td>
<td>$455,403</td>
<td>$328,607</td>
<td>$477,902</td>
<td>$819,705</td>
<td>$65,892</td>
<td>$521,603</td>
<td>$302,648</td>
</tr>
<tr>
<td>3rd QTR.</td>
<td>$2,914,897</td>
<td>$52,281</td>
<td>$637,550</td>
<td>$458,606</td>
<td>$608,551</td>
<td>$1,095,239</td>
<td>$90,850</td>
<td>$735,175</td>
<td>$370,985</td>
</tr>
<tr>
<td>4th QTR.</td>
<td>$1,698,113</td>
<td>$35,290</td>
<td>$449,969</td>
<td>$278,113</td>
<td>$380,650</td>
<td>$765,413</td>
<td>$61,039</td>
<td>$551,755</td>
<td>$271,769</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$7,705,506</td>
<td>$148,293</td>
<td>$1,783,190</td>
<td>$1,250,346</td>
<td>$1,751,576</td>
<td>$3,211,858</td>
<td>$256,975</td>
<td>$2,070,316</td>
<td>$1,145,879</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>UNINCORP.</th>
<th>CLOVERDALE</th>
<th>HEALDSBURG</th>
<th>PETALUMA</th>
<th>ROHNERT PARK</th>
<th>SANTA ROSA</th>
<th>SEBASTOPOL</th>
<th>SONOMA</th>
<th>WINDSOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$1,245,786</td>
<td>$18,518</td>
<td>$279,708</td>
<td>$212,922</td>
<td>$316,041</td>
<td>$577,394</td>
<td>$43,010</td>
<td>$352,882</td>
<td>$223,231</td>
</tr>
<tr>
<td>1st QTR.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd QTR.</td>
<td>$2,248,535</td>
<td>$38,872</td>
<td>$560,767</td>
<td>$371,683</td>
<td>$476,037</td>
<td>$857,815</td>
<td>$74,938</td>
<td>$571,481</td>
<td>$343,143</td>
</tr>
<tr>
<td>3rd QTR.</td>
<td>$3,346,902</td>
<td>$54,742</td>
<td>$735,373</td>
<td>$486,115</td>
<td>$643,120</td>
<td>$1,217,602</td>
<td>$101,079</td>
<td>$908,591</td>
<td>$461,011</td>
</tr>
<tr>
<td>4th QTR.</td>
<td>$1,951,855</td>
<td>$30,328</td>
<td>$514,165</td>
<td>$302,368</td>
<td>$304,315</td>
<td>$774,822</td>
<td>$62,679</td>
<td>$545,717</td>
<td>$283,596</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$8,793,077</td>
<td>$142,461</td>
<td>$1,090,013</td>
<td>$1,377,088</td>
<td>$1,839,513</td>
<td>$3,427,633</td>
<td>$281,707</td>
<td>$2,378,670</td>
<td>$1,310,981</td>
</tr>
</tbody>
</table>
TOT BREAKDOWN BY AREA

PERCENTAGE BREAKDOWN
Past Four Quarters

TOT Percentage Breakdown by Area
First Quarter 2018

Source: Sonoma County and Cities Finance Departments

TOT Percentage Breakdown by Area
Second Quarter 2017

Source: Sonoma County and Cities Finance Departments

TOT Percentage Breakdown by Area
Third Quarter 2017

Source: Sonoma County and Cities Finance Departments

TOT Percentage Breakdown by Area
Fourth Quarter 2017

Source: Sonoma County and Cities Finance Departments
SONOMA COUNTY TOT SPENDING

TOT SPENDING BREAKDOWN

Unincorporated Area

TOT tax revenues are derived from a 9.0-12.0% tax on the rental of hotel and motel rooms, inn beds, and campgrounds in the unincorporated areas.

Source: Sonoma County and Cities Finance Departments

Total City & Unincorporated TOT Receipts
Calendar Year 2014-2017
(Millions of Dollars)

Source: Sonoma County Auditor-Controller/Treasurer-Tax Collector

Seasonally Adjusted TOT Revenues
Sonoma County, Q1 2006 - Q1 2018
(Millions of Dollars)

Source: County of Sonoma

County of Sonoma TOT Budget Breakdown
Unincorporated Area
Fiscal Year 2017-2018

Other
Measure L
Culture & Events
Audit & Collection
Agricultural Promotion
Tourism
Economic Development Board
Transfer to General Fund

Source: County of Sonoma
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.
SONOMA COUNTY LODGING DEVELOPMENTS

Unincorporated Area, Petaluma, and Cotati

Q1 2018 Updates

Sonoma County currently has 31 lodging industry development projects in the works. When completed, 2527 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>
</tr>
</thead>
<tbody>
<tr>
<td>Unincorporated Area</td>
<td>Tru by Hilton</td>
<td>Hotel</td>
<td>251 Aviation Blvd, Santa Rosa, CA 95403</td>
<td>102</td>
<td>Unknown</td>
<td>Status: Application is in “referrals sent” status; the project is being reviewed by other County divisions and other stakeholders for their comments and conditions. Staff: MIG consultants</td>
</tr>
<tr>
<td>New</td>
<td>Sonoma Country Inn (Graywood Ranch)</td>
<td>Luxury/Resort</td>
<td>7945 Highway 12, Kenwood</td>
<td>50</td>
<td>2019</td>
<td>Application approved by Board of Supervisors</td>
</tr>
<tr>
<td>New</td>
<td>Guernewood Park Resort</td>
<td>TBD</td>
<td>17155 Highway 116, Guerneville</td>
<td>120</td>
<td>Q1 2020</td>
<td>Incomplete application</td>
</tr>
</tbody>
</table>

City of Petaluma

| New              | Hampton Inn - Silk Mill               | Full Service     | 750 Jefferson St.                     | 76             | Q2 2018                | Under construction                                                        |
| New              | Riverfront Courtyard Marriott         | Focused Service  | 500 Hopper St.                        | 122            | 2019                   | Approved                                                                 |
| New              | Petaluman Hotel                       | Full Service     | 2 Petaluma Blvd, S                    | 54             | Unknown                | Inactive 10/31/2013                                                       |

City of Cotati

| New              | Reverb by Hard Rock Hotel             | TBD              | 147 Joseph Way                        | 150            | 2021                   | In application review                                                     |

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.
## CITY LODGING DEVELOPMENTS

### Santa Rosa and Rohnert Park

#### Q1 2018 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><strong>New</strong> Courthouse Square Hotel</td>
<td>Limited Service</td>
<td>37 Old Courthouse Square</td>
<td>70</td>
<td>Q1 2019</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Residence Inn by Marriott</td>
<td>Limited Service</td>
<td>3558 Round Barn Circle</td>
<td>114</td>
<td>2019</td>
<td>Application in process</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Hampton Inn and Suites</td>
<td>Limited Service</td>
<td>3745 Airway Drive</td>
<td>101</td>
<td>2019</td>
<td>Applications pending</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> La Quinta</td>
<td>Limited Service</td>
<td>111 Commercial Court</td>
<td>100</td>
<td>2020</td>
<td>Early development and planning</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Hyatt Place</td>
<td>Full Service</td>
<td>3750 N Laughlin Rd</td>
<td>140</td>
<td>2020</td>
<td>Proposed</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> AC Hotel by Marriott</td>
<td>Limited Service</td>
<td>210 5th Street</td>
<td>144</td>
<td>2019</td>
<td>Design Review Board 3/15/2018</td>
<td></td>
</tr>
<tr>
<td>Expansion</td>
<td><strong>Expansion</strong> Hyatt Vineyard Creek Hotel</td>
<td>Full Service</td>
<td>170 Railroad Street</td>
<td>89</td>
<td>2018</td>
<td>89 new rooms</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Expansion</strong> The Economy Inn</td>
<td>Limited Service</td>
<td>502 Santa Rosa Avenue</td>
<td>20</td>
<td>2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Vinter’s Inn</td>
<td>Full Service</td>
<td>4350 Barnes Ave</td>
<td>30</td>
<td>2018</td>
<td>34 additional rooms</td>
<td></td>
</tr>
<tr>
<td>City of Rohnert Park</td>
<td><strong>New</strong> Cambria Hotel and Suites</td>
<td>Full Service</td>
<td>5870 Labath</td>
<td>132</td>
<td>Q1 2019</td>
<td>Part of Five Creek Project, Under construction</td>
<td>Approved by Planning Commission June 2017</td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Home2 Suites by Hilton</td>
<td>Full Service</td>
<td>6490 Redwood Drive</td>
<td>100</td>
<td>Q1 2020</td>
<td>Final Stages of Planning</td>
<td>Under Review</td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> Fairfield Inn &amp; Suites by Marriott</td>
<td>Full Service</td>
<td>405 Martin Avenue</td>
<td>100</td>
<td>Q3 2019</td>
<td>Across from the Cambria</td>
<td>Approved by Planning Commission September 2017</td>
</tr>
<tr>
<td></td>
<td><strong>New</strong> TBD</td>
<td>Full Service</td>
<td>6400 State Farm Drive</td>
<td>156</td>
<td>Q4 2020</td>
<td>Conceptual</td>
<td>Under Review</td>
</tr>
</tbody>
</table>
### 2018 Q1 TRANSIENT OCCUPANCY TAX REPORT

## INDUSTRY DEVELOPMENT

### CITY LODGING DEVELOPMENTS

Sebastopol, Healdsburg, and Sonoma

### Q1 2018 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><strong>City of Sebastopol</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>French Garden Inn</td>
<td>Limited</td>
<td>9050 Bodega Avenue</td>
<td>18</td>
<td>2019</td>
<td>Use Permit approved; No building permits issued.</td>
<td>Returning to Design Review Board late 2018 for redesign.</td>
</tr>
<tr>
<td>New</td>
<td>Hotel Sebastopol</td>
<td>Full service</td>
<td>6828 Depot Street</td>
<td>66</td>
<td>2019</td>
<td>Use Permit approved; No building permits issued.</td>
<td>“Demolition underway; No building permits issued.”</td>
</tr>
<tr>
<td>New</td>
<td>Hotel Barlow</td>
<td>Limited Service</td>
<td>6780 McKinley Street</td>
<td>60</td>
<td>TBD</td>
<td>Use Permit expired; returned for Preliminary Review to Planning Commission</td>
<td>Preliminary Review by Planning commission</td>
</tr>
<tr>
<td><strong>City of Healdsburg</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Hamron Guest House</td>
<td>Limited Service</td>
<td>227 Healdsburg Ave</td>
<td>39</td>
<td>Q2 2018</td>
<td>Construction</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Hotel TRIO</td>
<td>Limited Service</td>
<td>110 Dry Creek Road</td>
<td>122</td>
<td>Q2 2018</td>
<td>Construction</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>NuForest Mill Hotel</td>
<td>TBD</td>
<td>164 Healdsburg</td>
<td>53</td>
<td>Q4 2019</td>
<td>Early development</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Saggio Hills Resort &amp; Spa</td>
<td>TBD</td>
<td>16694 Passalacqua Road</td>
<td>130</td>
<td>TBD</td>
<td>Seeking financing</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Healdsburg Ave Hotel</td>
<td>TBD</td>
<td>230 Healdsburg Ave</td>
<td>TBD</td>
<td>TBD</td>
<td>Early development</td>
<td></td>
</tr>
<tr>
<td><strong>City of Sonoma</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Hotel Project Sonoma</td>
<td>Hotel w/ Spa &amp; Restaurant</td>
<td>153 West Napa St. &amp; 541 First St. West</td>
<td>62</td>
<td>2019</td>
<td>Per the direction of the City Council on appeal, a recirculated draft EIR is being prepared, with additional analysis of traffic and project alternatives</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Hawker Sonoma</td>
<td>Boutique Hotel</td>
<td>158-72 West Napa St.</td>
<td>7</td>
<td>2018</td>
<td>Use Permit application approved by Planning Commission on 10/13/16. Under construction.</td>
<td></td>
</tr>
</tbody>
</table>
SOURCES

City data is provided by the finance and planning departments of Cloverdale, 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 Departments.

METHODOLOGY

Total, city, and unincorporated area TOT revenues are seasonally adjusted using X-13ARIMA-SAM, 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 first quarter (January, February, March) of calendar year 2018, 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.

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