

SONOMA COUNTY
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Sonoma County
Dean Runyan Economic Impact of Tourism Report
For calendar year 2022

SUMMARY

The 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/researchtrends>

The tourism industry in Sonoma County saw marked improvement in 2022 following the post pandemic recovery year of 2021. The pre-pandemic total (direct and indirect) visitor spending of \$2.23 Billion shrunk by almost 50% to a low of \$1.25 Billion in 2020. Visitor spending in 2021 grew to \$1.938 Billion and in 2022, total visitor spending grew by another 18.7% over 2021 levels to \$2.299 Billion, outpacing pre-pandemic visitor spending by 2.8%.

Sonoma County Direct Travel Impacts, 2018-2022

	Spending (\$Millions) Direct and Indirect	Earnings (\$Millions)	Employment	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%

Visitor Spending by Commodity Purchased (\$Millions)

	Accommodations	Food Service	Food Stores	Local Transportation and Gas	Arts, Entertainment, Recreation	Retail	Visitor Air Trans.
2018	\$510	\$563	\$67	\$179	\$353	\$340	\$12
2019	\$505	\$580	\$69	\$184	\$354	\$348	\$14
2020	\$299	\$355	\$39	\$81	\$195	\$187	\$5
2021	\$576	\$502	\$70	\$130	\$264	\$262	\$12
2022	\$657	\$567	\$83	\$173	\$306	\$319	\$21
2021- 2022 Change	+14.1%	+13%	+19%	+33.1%	+16%	+21.8%	+75%

Visitor Spending by Type of Traveler Accommodation (\$Millions)

	Hotel, Motel, STVR	Private Home	Campground	2 nd Home	Day Travel (no overnight)
2018	\$1,112	\$179	\$61	\$114	\$558
2019	\$1,113	\$190	\$66	\$117	\$568
2020	\$722	\$60	\$56	\$143	\$181
2021	\$1,138	\$207	\$69	\$127	\$275
2022	\$1,239	\$209	\$89	\$122	\$467
2021-2022 Change	+8.9%	+1.0%	+28.1%	-3.8%	+70%

Notes:

- Details may not add to totals due to rounding.
- Other Travel includes resident air travel and ground transportation impacts for travel to other California destinations, travel arrangement & reservation services, and convention & trade show organizers.
- 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.
- Economic impacts are attributed to visitor trips defined as trips taken by individuals that stay overnight away from home or travel more than 50 miles on-way on a non-routine trip, as defined by the California Tourism Marketing Act.
- The estimates for 2022 are designated as preliminary due to some incomplete source data for the calendar year.