



USA

Sonoma County, California
Annual Report FEB 2022



SONOMA SUSTAINABLE TOURISM OBSERVATORY

9-Feb-22

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Year 4 Annual Report 2021-2022

What were our 2021 Plans and Goals?

Our focus for 2021 was to take a look at how tourism is rebounding now that the vaccine is available and has been administered to the bulk of the population.

Most recent travel update: As of August 3rd, 2021, Sonoma County is open for business and travel. However, it is mandatory to wear masks indoors in public places¹.

Moving forward into 2022

After tourism ground to a halt last in 2020, all of our goals and priorities for 2021 shifted. Now the goal is not to a return to normalcy, but to **Build Back Better**. Creating a new, healthier normal than what we lived before. 2022 will be a time of implementation and finetuning changes wrought by both COVID-19 and fires, which have altered the course of the last few years.

Our next focus will be on Petaluma, which, over the past year, has made big strides in their climate efforts. At the beginning of this year they created and filled a new government position, Climate Action Manager, and last March they became the first city in the US to ban construction of new gas stations and pumps. They also won the “Cool City Challenge”, one of three cities awarded a grant to combat climate change, specifically, to help Petaluma reach carbon neutrality by 2030. We will be taking a closer look at these endeavors in our next report.

Geography & Topography

Sonoma County extends over 1,500 square miles and is home to 493,285 people, with approximately 33 percent of the population residing in Santa Rosa. Geographically, Sonoma County features 55 miles of coastline followed by rolling coastal mountains. A deep, flat valley following Highway 101 north-to-south hosts the bulk of the population and metropolitan centers. Continuing east, there are a series of tall, steep, linear mountain ranges, including the Sonoma Mountains, Mayacamas Mountains, and the Girdle, then Napa Valley.

Climate-wise, Sonoma County enjoys a Warm-Summer Mediterranean climate, meaning we tend to get hot, dry summers and wet but mild winters. Climate change is changing those wet winters, as frequent droughts have kept the yearly rainfall either absent or minimal.

Data Collection

Our stats are sourced from various public collection agencies at the county, state, and country levels, as well as from colleges and universities, journalists and news outlets, and tourism organizations. Data are released between April and July for the previous year, which means as of our writing in February, much of these data are not yet available. This year (2022) we will be primarily presenting 2020’s visitor data. In places where 2021 data are available, we will use them.

¹ <https://www.sonoma.com/sonoma-county-businesses-who-is-open-and-closed/>

Visitor Breakdown in 2020:

Looking at a survey² of approximately 330,000 domestic travelers and asking questions specific to Sonoma County travel, key findings were derived:

- In 2020, Sonoma County welcomed 8.4 mil visitors: 3.6 mil overnight and 4.8 mil day visitors
- The average stay was 2.2 nights and the average per-person expenditure for overnight visitors was \$165

According to data compiled by Dean Runyan Associates, Sonoma County's visitor spending was cut nearly in half compared with a year prior as contagion fears and government policies restrained vacation plans.

The winding down of the COVID-19 pandemic will power re-growth of the industry, with vaccination rates reaching 80% by mid-August, massive fiscal support totaling \$2 trillion this year, and the unleashing of pent-up demand by higher-income households that socked away cash while sheltering in place. If everything sticks roughly to script, the economy will fully recover from the pandemic, with a sub-4% unemployment rate by mid-2022. It will have taken two years for the economy to return to full employment. For context, it took nearly a decade for the economy to find its way back after the financial crisis, and approximately five years after the 1990 and 2000 recessions.

Hotel revenues in Sonoma County through April are 20% higher than last year's, and consumers feel more confident and more willing to vacation.

According to the Conference Board, the share of Americans planning a vacation in the next six months rose to 37% in April, marking steady improvement over the last six months, though it is still far below historical levels. However, with states pushing forward with reopening plans and the vaccination rollout gaining steam, we expect this number to climb higher.

According to Morning Consult, the share of respondents who are willing to travel rose to 60% in the last week of May after hovering around 30% for much of January and February. Respondents are more comfortable traveling by car than through domestic air travel, and this will likely help Sonoma County recover more quickly than other tourism-centric areas given its proximity to large population hubs and more of a reliance on visitors from neighboring metro areas within driving distance.

We look at a variety of sources, analytic groups, and data collection agencies for the visitor breakdown, including The Sonoma County Economic Development Board (EDB), Longwoods International, Moody's Analytics, Visit California and Dean Runyan Associates, and Sonoma County Tourism

² Longwood's proprietary Travel USA

Issue Areas

1 *Tourism seasonality*

A year-round industry, the peak season begins in May/June and goes through November.

Due to Coronavirus, tourism has shifted somewhat based on vaccination rates and state guidance for travel and dining. Normally, April-June is one of the busiest seasons and Jan-March is the slowest season.

2 *Employment*

From Moody's Analysis: "Leisure/hospitality employment was cut in half at the onset of the pandemic and is only starting to recover. While payrolls have improved in each of the last three months and sit at their highest level in nearly a year, they remain 30% below their pre-pandemic levels.

Labor shortages, which are hampering businesses' ability to get back in full swing, are pushing up wages and prices. It seems incongruous that there are a record number of open jobs at that same time unemployment remains so high and labor force participation so low. This is unprecedented. Early in past economic recoveries, high unemployment and low labor force participation meant businesses had no trouble finding workers at depressed wages."

3 *Destination economic benefits*

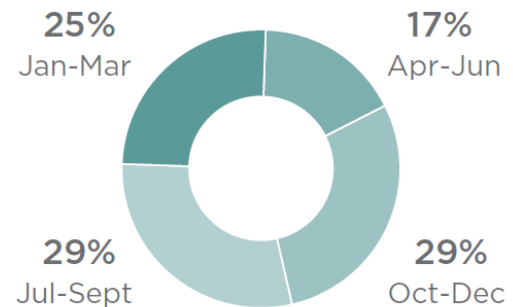
From Moody's Analysis: "According to Smith Travel Research, average daily rates at Sonoma County hotels jumped 58% in July 2021 compared with July 2020. These figures are well above typical July rates prior to the pandemic. Occupancy rates have almost recovered to their prepandemic averages, sitting at 77%.

Profit margins have nowhere to go but up after an extremely difficult year for Sonoma County hospitality operators. Rising revenue at local hotels will help offset quickly advancing operating expenses. Unfortunately, given the slow start to this year, profitability will lag its pre-pandemic levels. Year-to-date revenues through April 2021 were approximately 20% lower than YTD revenues through April 2019."

Including all spending on accommodations, wine activities, retail, and other tourism-related purchases, the most recent figures show that Sonoma County's destination spending decreased by 49.5% from \$2.1 billion in 2019 to \$1.1 billion in 2020.

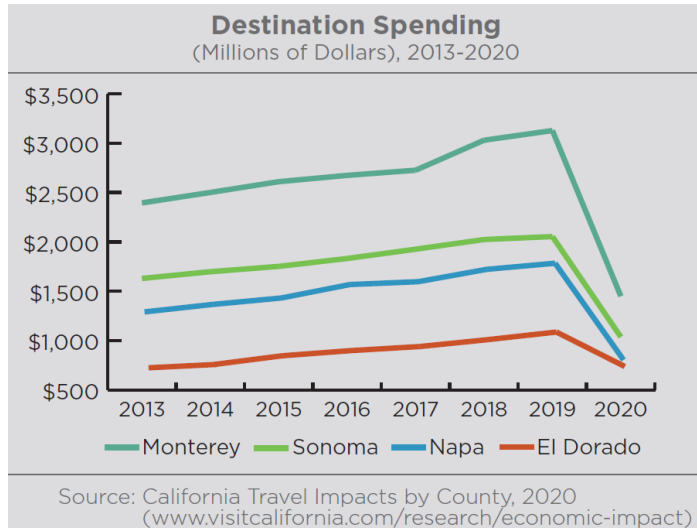
The most recent figures show that Sonoma County's Industry Earnings Generated by Travel Spending decreased by 24.4% from \$863 million in 2019 to \$652 million in 2020.

Season of Trip



Source: Longwoods International

In comparison with other competitive counties, a smaller share of visitor spending in Sonoma County comes from visitors who are staying in a hotel or motel (62% compared to 67% in El Dorado County, 77% in Monterey County, and 82% for Napa County). Instead, a significant share of Sonoma County visitor spending is received from day travelers (13%) compared to 11% for Napa, 8% for Monterey, and 3% for El Dorado.



Note that bookings made through sites such as Airbnb and VRBO do not pay the Transient Occupancy Tax, which has skewed some data in recent years.

4 Governance

The United States governance system is multi-tiered, consisting of Federal, State, County, and City level agencies. As it relates to tourism, government agencies collect taxes, manage parks, and upkeep infrastructure.

In California, climate change is considered to be a threat to our economy and our way of life. The state has a climate plan, and goals to meet regarding carbon pollution, forestry management, and how our energy needs are being met. In addition to the state plan, counties and cities are also adopting and enacting their own climate initiatives. The City of Petaluma has had a particularly strong year of climate policy, which we discuss in the Climate Change section.

5 Local satisfaction with tourism

In our survey this year, one of our respondents went above and beyond in writing about some issues in the West County. We've organized and paraphrased what she wrote below.

"First, the problem of fire and emergency. The Sonoma Coast is particularly hard hit by constant road accidents, or coastal bluff and beach rescues, the majority of which are tourists coming from other counties. Right now, emergency services and fire departments are paid for by taxes and private donations, paid by local property owners. It is not enough and it shouldn't be the local populace paying for the tourist mayhem. Bond measures placed on the ballot fail as city residents don't experience as much disruption as rural residents and the county seems to have no plans to fix this problem. Any service that the tourists impact negatively should be mitigated by funds that do NOT come from local residents. Services are currently buckling under the demand.

Thanks to the PGE funds from the fire settlement, more west county roads were being paved in 2021, but there is a vast backlog of untended roads with huge potholes, or roads cracking away on slopes. Whoever benefits most from the intensely promoted tourism should be putting more money toward

the ongoing road maintenance and repair. Many mall businesses, lodgings, restaurants and park systems make a lot of their money from tourism, which is very good, but they should also be contributing more to the maintenance of the infrastructure that those tourists impact. Basic services should be provided at managed destinations, and en route, so that tourism doesn't feel like an assault to locals. And tourists could/should be educated to what to do better -- with signs, brochures, any attached to any reservations being made.

Bicyclists use the same roads as vehicles, which are in disrepair, and riding can be legitimately dangerous. Separated bicycle roads would be best, but wider roads are also a possibility. At the very least, keeping the roads in decent shape would make everyone feel better about having to share them with so many outsiders, whether in cars or on bikes.

Bus service is pretty hopeless in the rural region, but could possibly help with the congestion and parking issues at destinations, particularly coastal. Perhaps creating central places to park and ride with bus service to those destinations? Better public transit and parking would also support Accessibility to those locations for disabled locals and visitors."

This next part, about Accessibility and her final thoughts, we've included in her words with her personal experience: *"Much of our tourism has become about hiking in nature. There are many paths maintained by nonprofits and citizen volunteers, but the only bathrooms or trailhead porta-potties are at actual state or regional parks. There are plenty of rules against off-trail impromptu bathroom use, for obvious reasons, but really what are people to do? Many of us locals plan ahead or we know wilderness rules if you must, but tourists often do not. A west county trail that I've walked for a decade has become very popular and really the signs of excrement just about spoil it. You didn't ask, but it's an issue. If the trails are described on the maps and apps for public use, then some minimal parking and toilets should be provided. Yesterday at a trailhead off Coleman Valley Road, I saw three cars get stuck in the mud while trying to park out of the way of passing traffic on a narrow curve. Does anyone from your agency visit these trails on a weekend, to see how things work? Does anyone even realize that there is not a single public restroom in Occidental, which has become a serious tourism destination? And yet the town is so packed with cars --mostly tourists-- from Friday farmers market through Sunday evenings that locals can barely get in and out of town. Finally a businessperson voluntarily put up a summer-only porta-potty in 2021...just one, at the end of town. This is surely an ADA issue worthy of attention, as well as for the rest of the public, in the name of hygiene as well as comfort.*

I'm sure there are models for better management of the impact of tourism on natural places, public sites, and on the lives of residents. I've lived here 42 years and seen many phases. Some things have definitely improved over time. But tourism has vastly increased. Many infrastructure needs have been postponed or ignored. The county has an SOS online request program that is a joke, with little or no response. Thank you for asking -- and I hope this is helpful."

Our survey this year included the following questions:

1. As a visitor or resident stakeholder, is there anything you could see Sonoma County doing differently to support sustainable efforts, especially in tourism?
2. Transportation is a big issue, due to both the pollution it contributes and the traffic it causes. What ideas do you have that could help mitigate the problem, especially as it relates to tourism?
3. Do you have a generally positive view of tourism or a generally negative view of tourism in the county?
4. Sonoma County adheres to ADA standards, but what holes do you see in accessibility in the county, especially for disabled visitors?
5. Any other thoughts on tourism or the environment in Sonoma County you would like to share with us?

The results were more varied, so instead of the usual charts and graphs we will be sharing the thoughts we received as lists. The first few responses in each list were the most popular.

1. As a visitor or resident stakeholder, is there anything you could see Sonoma County doing differently to support sustainable efforts, especially in tourism?

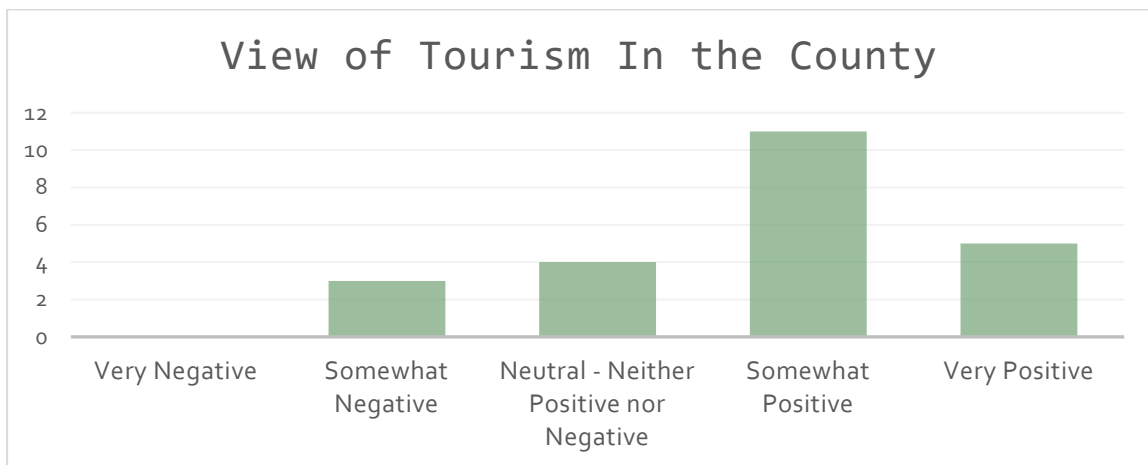
- Improve & Expand SMART³
- De-incentivize Parking/Driving
- Mixed Use Builds - Housing and Business
- Better Public Transit
- Better Shuttle Services from Airport
- Use LEED & FSC Standards for New Builds
- Create Ecotourism Department
- Expand Education on Regenerative Agriculture & Organic Practice
- Better Guides of the Region for Visitors
- Remove Invasive and Allergen-Causing Plants and Plant Native Plants
- More Funding for Sustainable Efforts
- Bike Safety and Infrastructure
- Better Coastal Access
- Better Electric Vehicle Infrastructure & Incentivize EV Ownership
- Reduce Plastic & Styrofoam Waste
- Intra-City Tourism
- Have Businesses Join the Green Business Program
- Use Graywater & Rainwater Collection
- Convert Existing Buildings to Senior Hostels
- Clean and Protect Riparian Wetlands
- Close off some Downtown Streets for Pedestrians

³ Sonoma-Marine Area Rail Transit (SMART) is the Bay Area's newest passenger rail service

2. Transportation is a big issue, due to both the pollution it contributes and the traffic it causes. What ideas do you have that could help mitigate the problem, especially as it relates to tourism?

- Dedicated & Protected Bike Lanes
- Zero-Emission Buses & Shuttles
- Encourage Car-Free Visitors
- Rentable Bikes & Scooters
- Integrate SMART with Biking & Walking Infrastructure
- Better Rain Infrastructure
- Minimize Movement
- Free Transit, Better Bus Routes
- Improve & Expand SMART
- Fix & Upkeep Damaged Roads
- Bus Tours
- Create a Transient Occupancy Tax for Travel Infrastructure
- Better Walkability
- No New Freeway Lanes

3. Do you have a generally positive view of tourism or a generally negative view of tourism in the county?



4. Sonoma County adheres to ADA standards, but what holes do you see in accessibility in the county, especially for disabled visitors?

- Repair Roads & Sidewalks
- Improve & Expand SMART
- Clean & Accessible Restrooms at Destinations & en Route
- Create Financial Assistance to help with the cost of Becoming Accessible
- Create an App to get Feedback on the Visitor Experience - Especially for Disabled Visitor Experience
- Accessible Tour Options
- Better Public Transit
- Safe & Available Parking at Coastal Destinations
- Sonoma Developmental Center
- Have Locations Surveyed for Accessibility

5. Any other thoughts on tourism or the environment in Sonoma County you would like to share with us?

- Share & Preserve the Landscape
- Repair Roads & Sidewalks
- Provide Affordable Accommodations & Food
- Restrict Short-Term Rentals
- Improve & Expand SMART
- Keep some Land for Ranching/Farming, not just Wine Grapes
- Charge forward on Eco-Tourism
- Improve Bus Routes & Access
- Have Businesses Join the Green Business Program
- Better Biking Trails/Roads/Lanes
- Help the Homeless!
- Limit Development of New Office Buildings as Many are Currently Empty

6 Energy management

US energy is privately managed, in Sonoma County, by Pacific Gas & Electric (PG&E). We spoke last year on the discussion regarding moving to a public energy model for management after multiple failures and fires started by the aging PG&E power grid, which has not been well maintained. We could not find any evidence of the continuance of that discussion since COVID-19 shifted attention and priorities.

7 Water management

Sonoma County's water is managed by a municipal water agency and is a part of the Russian River Watershed. All information on current usage, water storage, groundwater, stormwater, etc. can be found on the [Sonoma Water website](#).

They do not measure water use by the tourism industry separately from residential, industrial, commercial, and agricultural use, so we have no way to provide tourism specific water use figures.

Currently California is experiencing extreme drought conditions, even after some big rain events this Autumn. Drought is the new normal so water conservation is high on our list of to-do's. As of January 9, 2022, just after the huge atmospheric river rain event state water reservoirs were not nearly filled to capacity⁴.

What is Sonoma Water doing to prepare for a drought?

On December 23, 2021, Sonoma Water was awarded close to \$9 million from the California Department of Water Resources to make our water supply system more resilient during this and other droughts. Specifically, these funds will expand and improve the resiliency of the drinking water supply for over 600,000 people in Sonoma and Marin counties by rehabilitating two currently

⁴ <https://www.sfchronicle.com/climate/article/Charts-show-where-California-reservoir-totals-16566209.php>

inactive wells, which will provide approximately 3.7 million gallons of water daily. The funds will also assist with developing planning efforts in the Russian River watershed to address drought conditions and climate change.

In early 2020, Sonoma Water saved 11,000 acre-feet of water in Lake Mendocino (20% of its water capacity at the time) by implementing a deviation request that allowed the U.S. Army Corps of Engineers to use Forecast Informed Reservoir Operations (FIRO) decision support tools. This was a huge water supply reliability effort and the first of its kind in the nation. The development and implementation of FIRO was a direct result of the last drought we faced in 2013/2014.

In early 2020, due to dry weather conditions, Sonoma Water filed a Temporary Urgency Change Petition to preserve water in Lake Mendocino. This effort is estimated to have saved over 10,000 acre-feet of water in Lake Mendocino through the end of 2020.

In early 2021, Sonoma Water received approval to reduce water releases again from Lake Mendocino through a Temporary Urgency Change Order approved by the State Water Resources Control Board. At this point, Sonoma Water is making the minimum release of water from Lake Mendocino; Sonoma Water are currently releasing 25 cubic-feet-per-second at Lake Mendocino.

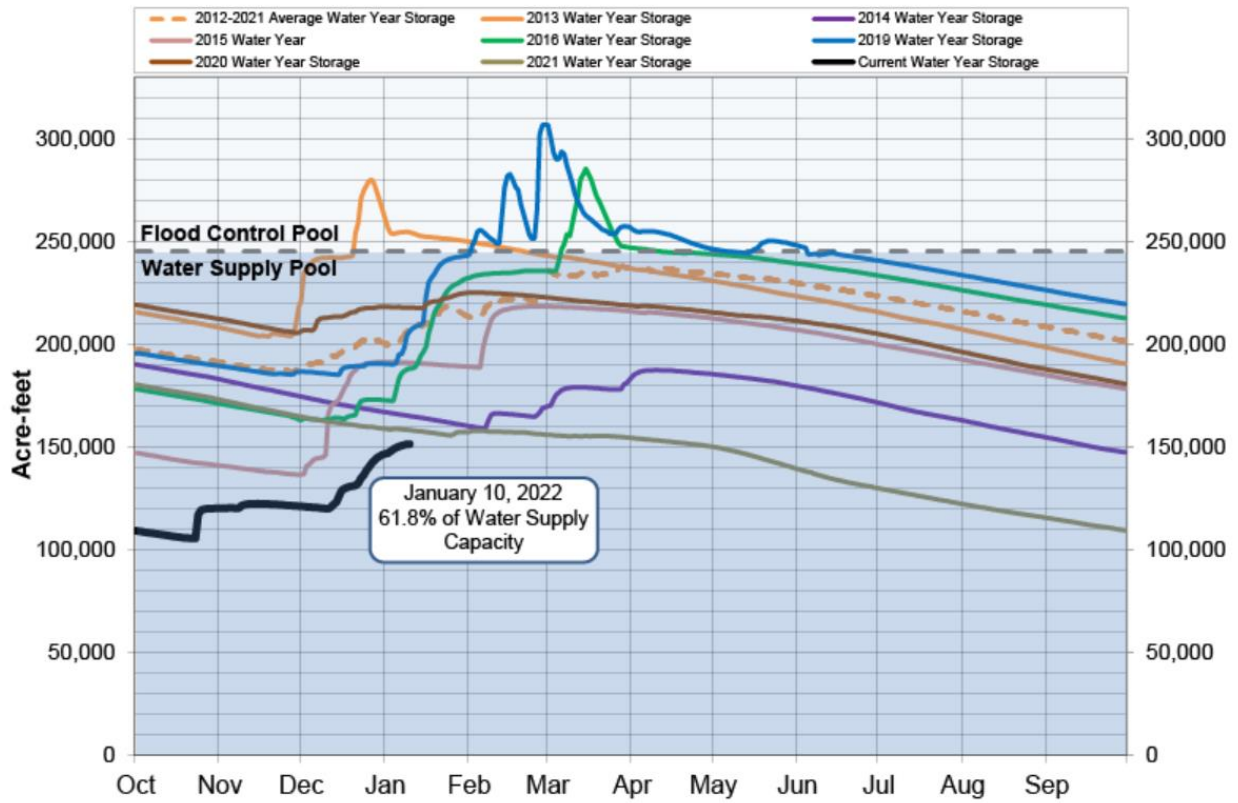
At the same time, Sonoma Marin Saving Water Partnership launched an aggressive public outreach campaign to emphasize the need to save water by highlighting actions customers can take to reduce water use and improve water use efficiency. The Partnership's current regional water use of 107 gallons per capita per day (GPCD) represents a 37 percent reduction in water use, well ahead of the State's required 20 percent reduction in per capita per day water use by 2020.⁵

2021 saw the lowest levels for both Lake Sonoma and Lake Mendocino, even lower than the previous low in 2014, at the peak of the previous drought. This year, 2022, is shaping up to be a better water year, but we don't expect, even with exceptional rain, to have our reservoirs filled up to or near capacity. Another positive outcome from last year's precipitation was the amount of snow the Sierra Nevada mountain range received. Much of California relies more upon snowpack for freshwater than reservoir storage, so that has been encouraging.

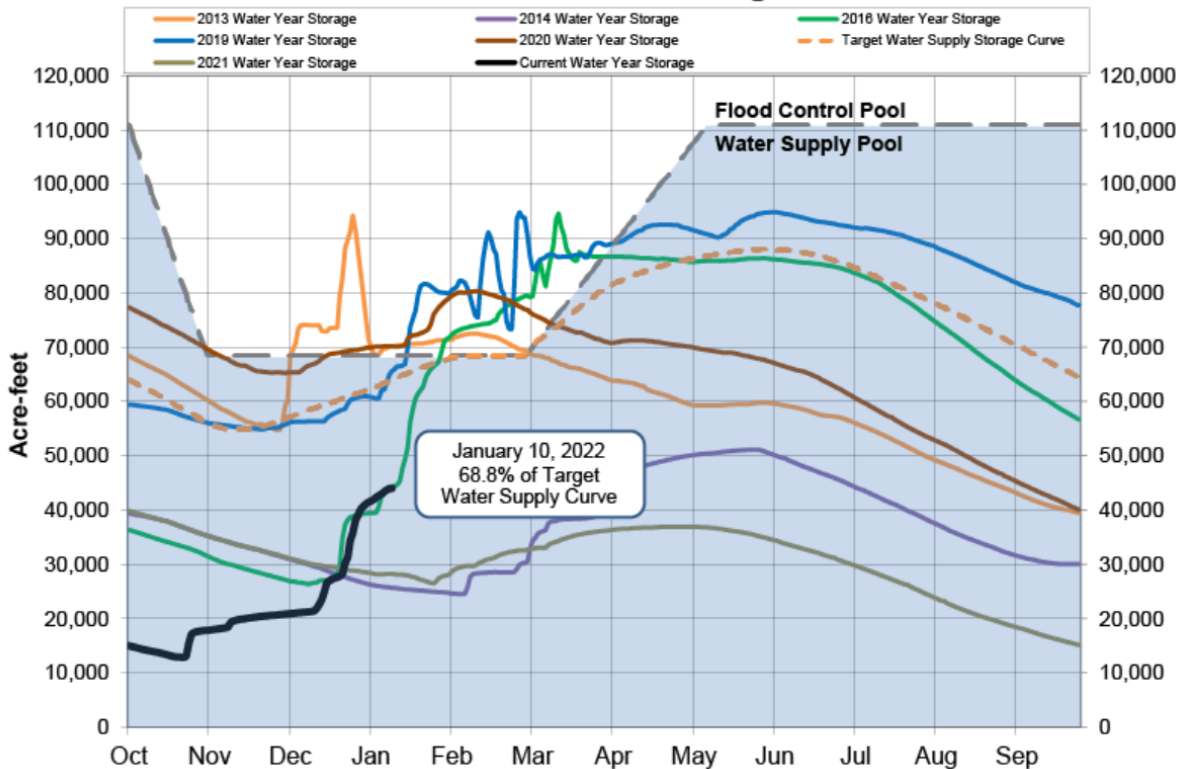
The following graphs represent the current and historical reservoir storage.

⁵ <https://www.sonomawater.org/current-water-supply-levels>

Lake Sonoma Storage



Lake Mendocino Storage



8 Solid waste management

The Sonoma County Waste Management Agency is a joint powers authority whose mission is to implement waste diversion programs as required by State law AB939. They aim to inform local residents and businesses of ways they can help reduce, reuse and recycle their solid waste and properly dispose of hazardous materials.

9 Waste water (sewage) management

Sonoma County treats its wastewater with four steps to turn sewage into tertiary recycled water: primary treatment, biological treatment (secondary), filtration and disinfection (tertiary). Tertiary treated water is not drinking water, but it contains nutrients for the irrigation of crops, vineyards, playgrounds, golf courses, parks, cemeteries, freeway embankments, and street medians⁶.

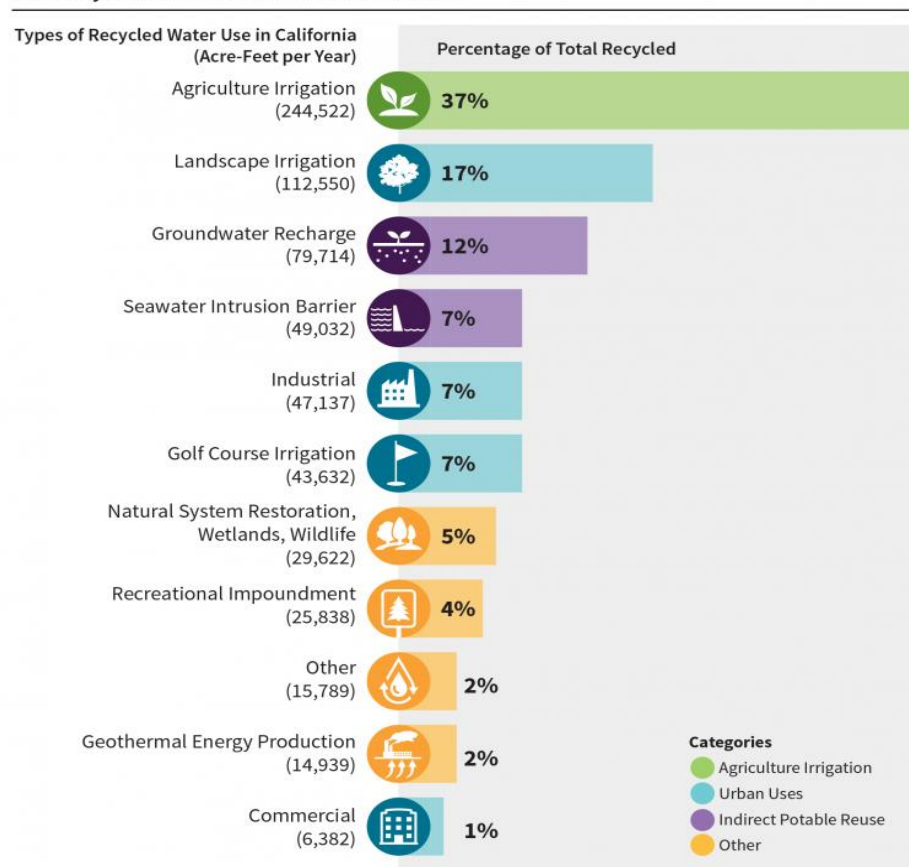
Notably, in mid-July 2021, the New York Times ran an article that brought wine country some grief. The Twitter headline was “In Napa Valley, the climate crisis has reached a point where some growers are spraying sunscreen on grapes, to try to prevent roasting, while others are irrigating with disinfected toilet water because normal water sources have run dry.”. You can see that tweet still up on the NYT Twitter [HERE](#).

The [actual article](#) was called, “Scorched, Parched and Now Uninsurable: Climate Change Hits Wine Country

Sunscreen on grapes. Toilet water that is treated and used for irrigation. Napa Valley winemakers are taking extreme steps in the face of climate change.”

Those of us in wine country found this article very misleading. Neither Napa nor Sonoma nor California spray their grapes with “toilet water”. Treated

How Recycled Water Has Been Used in California



Source: California Environmental Protection Agency, 2009

⁶ <https://srcity.org/1061/Recycled-Water>

water is used for irrigation across the world and though it isn't used for drinking, it is safe. Recycled water usage is shown on the right, though dated the usage proportions have remained similar to what is shown.⁷

10 Accessibility

In the US, the Americans with Disabilities Act (ADA) covers all disability access and accommodations that must be made, by law. For hospitality providers, this includes disabled parking designation, ramps, restroom access, and for overnight stays, rooms with accessible beds and showers. The ADA is regularly updated with new regulations coming into law every few years.

For a clear understanding of 2010 ADA Standards for Accessible Design [see this document](#), which was issued by the Department of Justice in 2012 and describes in detail all building & code expectations related to the Americans with Disabilities Act.

This year we included a question about accessibility in our "Local satisfaction with tourism" survey, the results of which can be viewed in Section 5. We have big plans for next year's accessibility section.

11 Climate Action

In August, the Board of Supervisors took one step closer to adopting a Zero Waste Resolution and Disposable Food Service Ware and Polystyrene ban ordinance developed by Zero Waste Sonoma. Alongside my Board colleagues, I showed my support for both items as they align with the County's climate action initiatives.

The Zero Waste Resolution establishes a goal of reaching zero waste by 2030 and outlines 36 initiatives to get there. Zero Waste, as defined by the Zero Waste International Alliance, is "the conservation of all resources by means of responsible production, consumption, reuse, and recovery of products, packaging, and materials without burning and with no discharges to land, water, or air that threaten the environment or human health."

A Disposable Food Service Ware and Polystyrene ban went into effect in January 2022. The ordinance addresses six areas:

1. Prohibits polystyrene foam food ware distributed by food and beverage providers.
2. Prohibits polystyrene foam food ware and specified polystyrene foam products sold by retail stores.
3. Requires food/beverage providers and special events to use of unlined, fiber only compostable products or recyclable food service ware.
4. Requires food/beverage providers to provide single-use straws, beverage lids, cutlery and to-go condiment packages only upon request. Customer may ask for the particular items, food providers may offer specific items, or the establishment may utilize a self-service area.

⁷ Poster from <https://esassoc.com/news-item/the-state-of-recycled-water-in-california/>

5. Requires food/beverage providers to provide service ware products without added fluorinated chemicals (PFAS).
6. Encourages use of reusables through optional fee for single-use or credit to customers providing their own containers.

There are many alternate food service ware products that are compostable, recyclable or those that can be cleaned and reused. Zero Waste Sonoma created a list of alternative products that can be found at https://zerowastesonoma.gov/uploads/documents/FINAL_PS_Alternatives-3-21.pdf.

As a preview of more to come from the county: county agencies, departments and special districts are working on identifying implementation plans to achieve the county’s goals around reducing wildfire risk and building resilience, upgrading homes and buildings to be carbon neutral and zero waste, electrifying our fleet and building out infrastructure to support electric vehicles (EVs), and updating planning documents and processes to integrate climate change adaptation and mitigation.

From the Sonoma Valley Sun Newspaper, written by Susan Gorin⁸

12 Cost of Living

Cost of living indices are based on a US average of 100. An amount below 100 indicates how much less expensive the region is than the US average. A cost of living index above 100 indicates how much more expensive that region is.

COST OF LIVING	Sonoma	California	USA
Cost of living	175	141	100
Goods & Services	118	111	100
Groceries	133	115	100
Health care	124	113	100
Housing	284	196	100
Transportation	144	133	100
Utilities	136	127	100
Median Home Cost	\$737,200	\$684,800	\$291,700

In every metric except for utilities, Sonoma County is more expensive. Housing, in particular, is 2.5X more expensive than the rest of the nation.

⁸ <https://sonomasun.com/2021/09/06/climate-action-at-the-county-level/>

This data is derived from the Council for Community and Economic Research (C2ER) for 2020 and we were able to find two sources who had crunched that raw data, www.areavibes.com/sonoma-ca/cost-of-living/ and www.bestplaces.net/cost_of_living/county/california/sonoma.

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If you have any comments or questions about the information in this document, contact us at our website: www.Sonomasustainabletourism.org, or email us at info@sonomasustainabletourism.org.