

# Welcome!

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**SONOMA COUNTY**  
**HOSPITALITY ASSOCIATION**

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Liza Graves, Chairperson  
Sonoma County Hospitality  
Association (SCHA)

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# Thank You- Elected Officials

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- CECILIA AGUIAR-CURRY, ASSEMBLY MAJORITY LEADER
- EDDIE ALVAREZ, COUNCIL MEMBER, CITY OF SANTA ROSA
- DR. AMIE CARTER, SCOE, SUPERINTENDENT OF SCHOOLS
- GERARD GIUDICE, VICE MAYOR CITY OF ROHNERT PARK
- DAVID HAGELE, MAYOR, CITY OF HEALDSBURG
- ARIEL KELLEY, COUNCIL MEMBER, CITY OF HEALDSBURG
- JILL MCLEWIS, COUNCIL MEMBER, CITY OF SEBASTOPOL
- KAREN NAU, PETALUMA CITY COUNCIL MEMBER FOR DISTRICT 3
- NATALIE ROGERS, MAYOR - CITY OF SANTA ROSA
- MARK STAPP, VICE MAYOR - CITY OF SANTA ROSA

Thank you for Joining the Conversation at Sally Tomatoes!

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**Today's Agenda:**

Meet the Board of Directors and Officers

Understand the SCHA Advocacy Platform

Learn the Goals and Objectives for 2024

**Featured Speakers:**

Assembly Majority Leader, Cecilia Aguiar-Curry

Louis Mirante, VP, Public Policy At The Bay Area Council

Conrad Braganza, Sonoma County Tourism

Terri Stark, Stark Reality Restaurant's



**SONOMA COUNTY**  
HOSPITALITY ASSOCIATION

*"Our collective strength drives action - we will move further if we do it together."*

Thank you  
to our host

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Sally  
Tomatoes  
Catering & Events



# Assembly Majority Leader Cecilia Aguiar-Curry

Cecilia Aguiar-Curry represents California's fourth Assembly District, including all Napa, Colusa, Lake, and Yolo Counties parts of Sonoma County.

Assemblymember Aguiar-Curry has served in the State Assembly since December 2016. In July of 2023, she held the role of Speaker pro Tempore before her appointment in November of 2023 as Majority Leader.

She serves as Vice Chair of the Legislative Women's Caucus. She is an accomplished legislative advocate and champion for women and children, California's working families, local government, small and rural cities, and agricultural communities. She is determined to fight for access to health care, education, and economic opportunity for all Californians.



Liza Graves, Chairperson  
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# SCHA Board of Directors

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LIZA GRAVES

Chairperson

COO, Beautiful Places

JOE BARTOLOMEI

Vice Chairperson

Co-founder, Farmhouse Inn

AL LERMAS

Secretary

Agave, El Gallo Negro, Mitote Food Park

KIRKMAN LOK

Treasurer

CEO, Lok Group of Companies

JENNIFER BUFFO

Board Member

COO, Pure Luxury Transportation

MARK MATHEWSON

Board Member

Vice President of Hospitality, Jackson Family Wines

LARRY WILLIS

Board Member

Owner/Innkeeper, The Gables Bed & Breakfast

LELAND FISHMAN

Board Member

Fishman Supply Company

KELLY BASS SIEBEL

None Voting Board Member

Senior Director, Community Engagement  
Sonoma County Tourism

DUSTIN VALETTE

Board Member

Chef/Owner, Valette Wines.,  
The Matheson

RENE BYCK

Board Member

Owner, Paradise Ridge Winery

APHRODITE CASERTA

Board Member

Director of Marketing, Safari West

EFREN CARRILLO

None Voting Board Member

CEO Gallaher Community Housing



**Al Lerma**

Advocacy Chair

Sonoma County  
Hospitality Association  
(SCHA)

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**SONOMA COUNTY**  
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## SCHA Policy Platform Statements

**Tourism** – SCHA supports a robust Sonoma County tourism sector as a key economic driver of our local economy through our Leave No Trace Behind Principles that protect and preserve our local destinations for generations to come...

**Destination Marketing Efforts** – SCHA supports ongoing funding for Sonoma County Tourism (SCT) tourism destination marketing efforts...

**Workforce Development** – SCHA supports workforce development efforts that promote jobs and industry training for our next generation of hospitality workers including partnerships with local colleges and high schools to enhance culinary and hospitality programs...

**Housing** – SCHA supports public/private efforts to develop and accelerate workforce housing projects countywide...

**Public /Private Events** – SCHA supports the staging of well-conceived, legally permitted and produced events with proper planning, coordination and communication with residents...

## SCHA Policy Platform Statements (Continued)

**Short Term Rentals (STRs)** – SCHA supports a balanced and level playing field with STRs and online agents and fair local regulations and tax collections regarding vacation rentals that recognize the significant positive economic impact of STR's...

**Industry Compliance & Permitting** – SCHA is actively engaged with County and local governing bodies on pending policies and compliance issues that will impact the Hospitality industry...

**Homelessness** – SCHA supports city and county efforts to provide shelter, emergency and support services, and permanent and stable housing options and plans to end homelessness in Sonoma County...

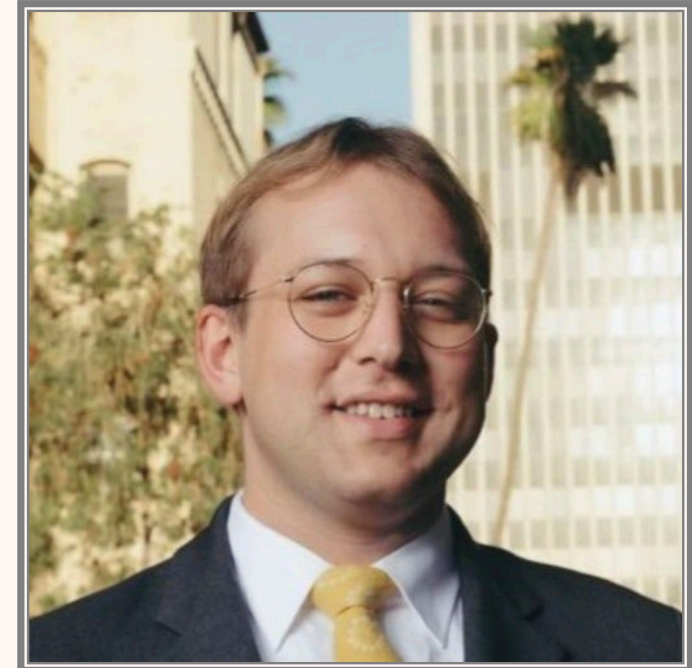
**Diversity, Equity & Inclusion** – SCHA supports DEI initiatives within the travel and tourism industry by encouraging programs that increase diversity for our workforce and visitors and...

**Quality of Life** – SCHA values a high quality of life for our hospitality industry and supports access to affordable healthcare, meaningful work or volunteerism, family friendly policies for childcare, life-work balance, healthy food and lifestyle, and access to cultural and leisure activities...

# Louis Mirante

## Vice President of Public Policy for the Bay Area Council

Louis Mirante is Vice President of Public Policy for the Bay Area Council and has worked on housing policy at the state, regional, and local levels since 2017. He is also on the boards of the Casita Coalition, an ADU trade association, and the California Housing Defense Fund, which enforces the Housing Accountability Act across the state.



# Housing in the Bay Area

Louis Mirante

VP of Public Policy with the Bay Area Council

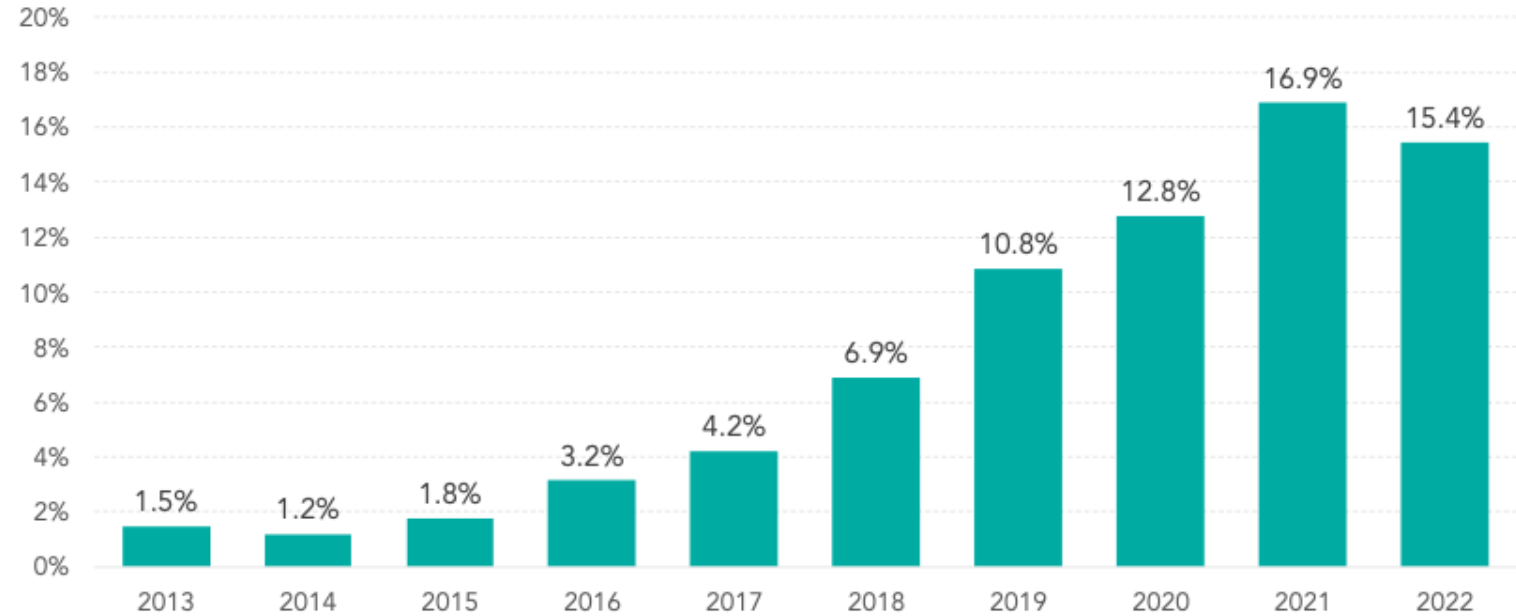


# About Me

- Work on State, regional, and local housing policy
- Most of my work is spent lobbying the Legislature, and I have been the lead lobbyist for several prominent housing bills. My 2023 work included AB 1033 and AB 1633
- The Bay Area Council works to make the Bay Area the best place to live and work

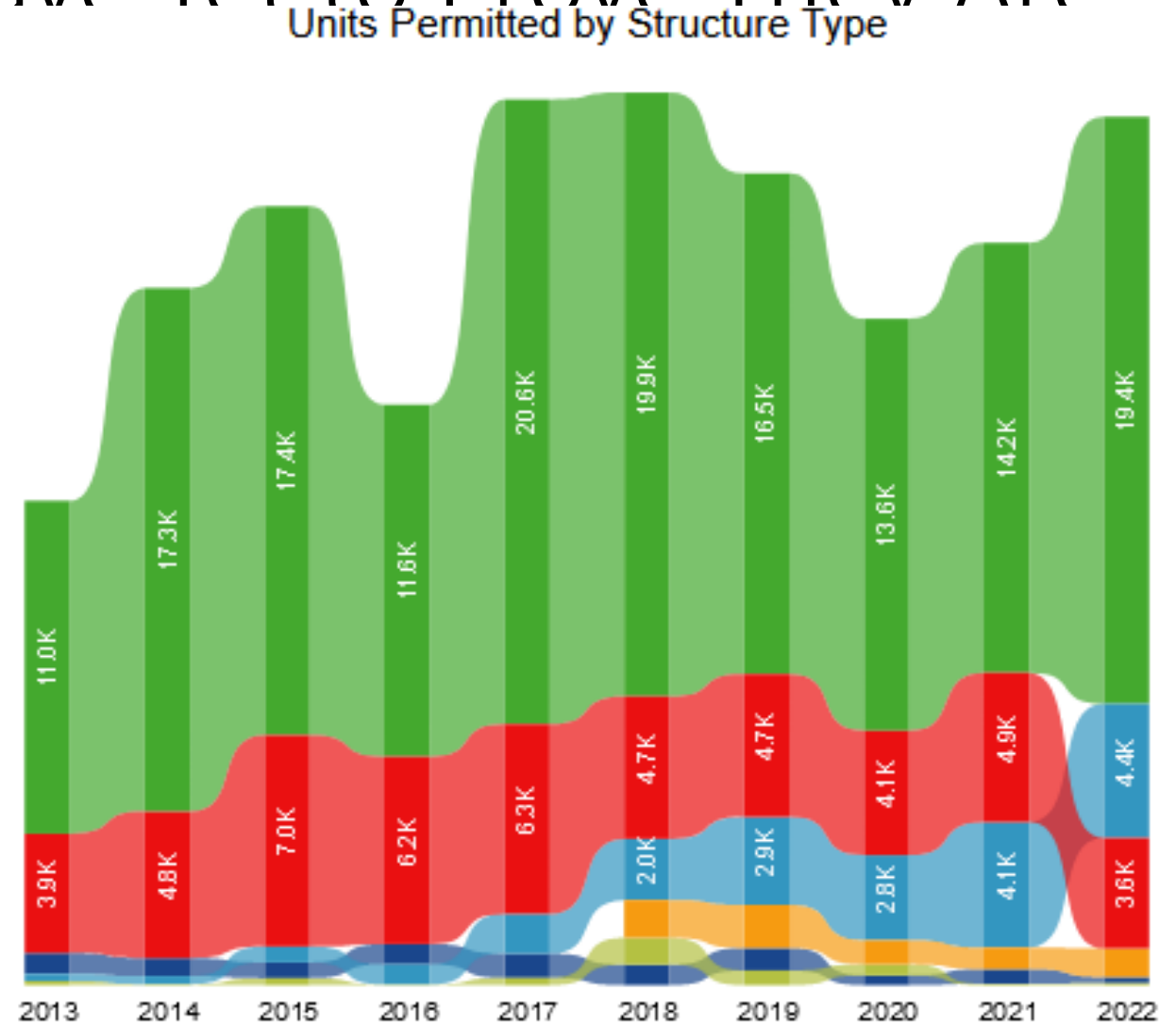
# ADUs are a Dramatic Success

**Since passage of SB 1069 in 2016, permits for accessory dwelling units (ADUs) have soared across the region**  
*ADUs as a share of total units permitted by year in the 9-county Bay Area (2013-2022)*



**Source:** California Department of Housing and Urban Development. **Analysis:** Bay Area Council Economic Institute

# Housing Elements Have Yet to Prove They Are Too



Housing production in Bay Area.

Source: Department of Housing and Community Development



# But Bay Area Voters May Catalyze Big Things in 2024

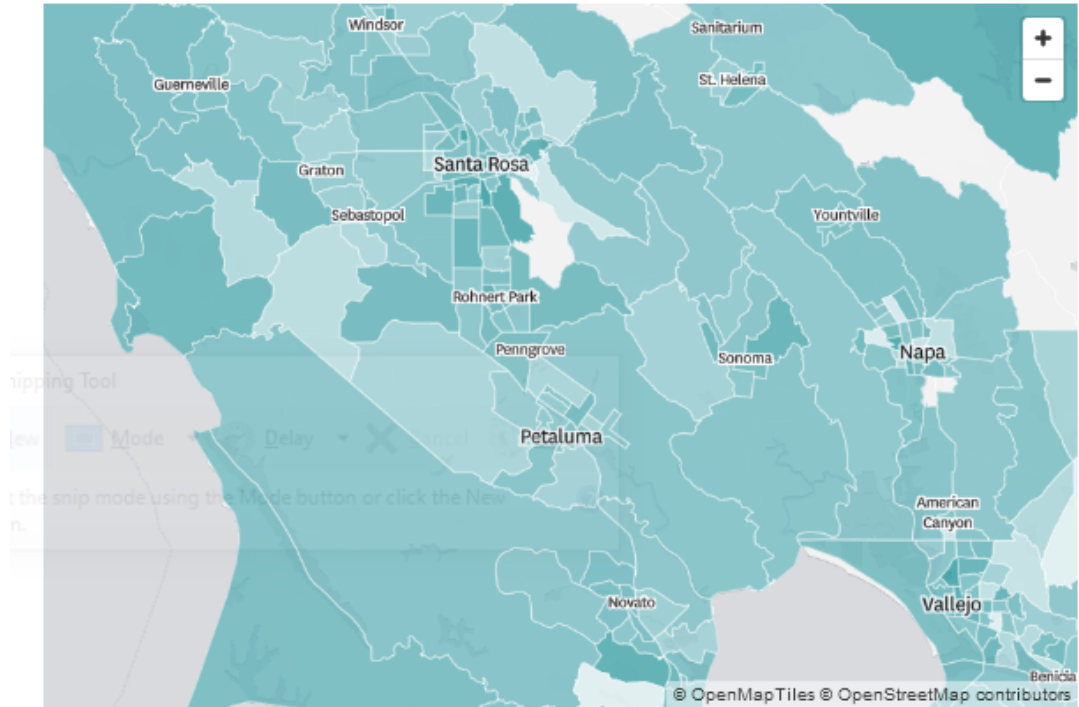
- In 2024, Bay Area Voters will vote on the following:
- Prop 1 in March (state initiative)
- ACA 1 (state initiative)
- SCA 2 (state initiative)
- BAHFA Bond (regional initiative)

# Housing Crisis Remains the Biggest Challenge We Face

## Burden of housing costs in the Bay Area

Share of households in each census tract paying more than 30% of their income toward housing costs

0%  60% or higher



Data includes renters and owners (with and without mortgages). It excludes census tracts where there are fewer than 500 households. Some tracts have a high margin of error.

Map: Harsha Devulapalli / The Chronicle • Source: [U.S. Census Bureau](#)

From: SF Chronicle

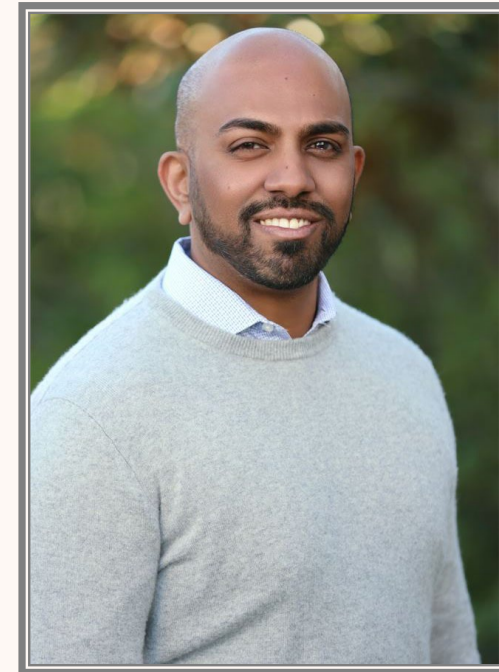
# But there's so much more coming

- Local governments opting into AB 1033 could create the first affordable for-sale homes in decades
- Groups like yours are getting engaged in housing in big ways
- The Legislature is treating housing with a seriousness most have never seen before
- Voters are continually supporting more, and housing reform remains very popular in polls
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- Thank you!
- [LMirante@bayareacouncil.org](mailto:LMirante@bayareacouncil.org)

# Conrad Braganza

## Senior Manager, Research, at Sonoma County Tourism

Conrad Braganza is Senior Manager, Research, at Sonoma County Tourism. He identifies and communicates consumer trends in the travel and tourism sector, and important intersections such as the wine industry, outdoor recreation, and sustainable travel. He presently serves on the Board of the Greater Western Travel and Tourism Research Association, the Research Committee of Visit California, and a member of Leadership Santa Rosa, Class 39.



# Insights from 2023 Non-Visitor Study

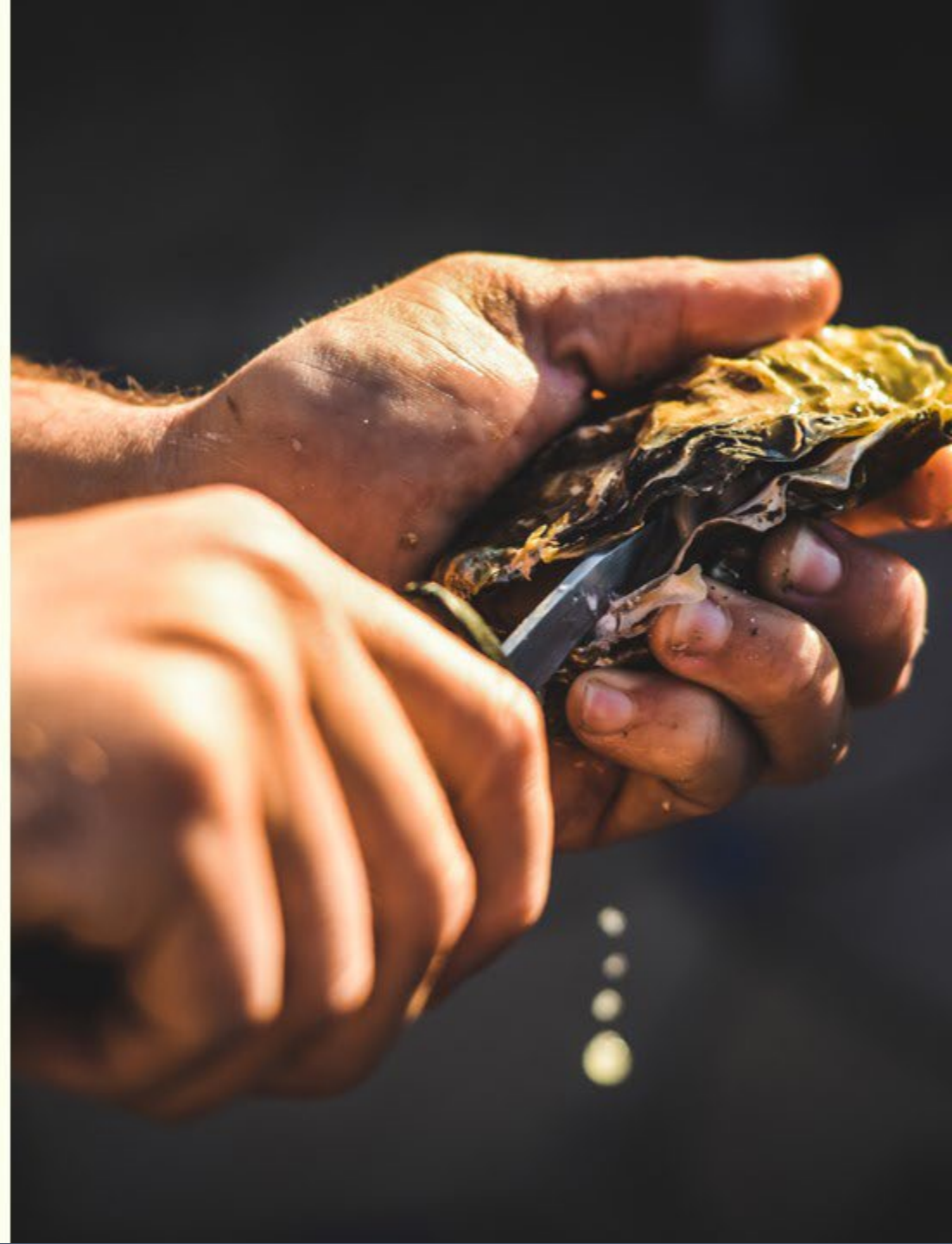
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• CALIFORNIA •  
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SONOMA COUNTY TOURISM  
SONOMACOUNTY.COM

Sonoma County Hospitality Association

# Methodology

## Online Survey

- Adults age 21+ who have not visited Sonoma County in the past three years
- Household income \$100,000+
- Travelers who have taken at least one overnight trip (50 miles or more one-way from home) for leisure reasons in the past 12 months
- Open to wine tasting, dining, nature, scenic beauty, and/or arts & culture travel experiences
- 400 residents of California outside of Sonoma County
- 400 residents outside California in the Western United States (Washington, Oregon, Idaho, Nevada, Arizona, New Mexico, Utah, Colorado, Wyoming, or Montana)



**Question:** Please select the **MOST IMPORTANT** reasons that have **kept you from visiting Sonoma County more often?** (Select as many as **THREE**)

- The high cost of visiting Sonoma County keeps me from visiting more often.
- Personal financial concerns keep me from visiting Sonoma County more often.
- I'm more interested in visiting other domestic destinations than Sonoma.
- I'm more interested in visiting international destinations than Sonoma.
- Sonoma County's tourism advertisements turned me off from visiting.
- Wine tasting experiences have become less attractive (more expensive, difficult reservations, etc.)
- Been there, done that. I'm not interested in visiting Sonoma County again.
- San Francisco's problems have made visiting that city (and by extension, Sonoma) less attractive
- Sonoma County is just not on my radar as a travel destination.
- Other wine country regions are more appealing than Sonoma County.
- Concerns about natural disasters (floods, wildfires, etc.) have made visiting Sonoma County less attractive.
- Sonoma County is challenging for me to get to.
- I don't know a lot about the things to see and do in Sonoma County.
- Overall, as a destination, Sonoma County does not offer good value for the money.

***An interest deficit is the single largest impediment to Sonoma visitation. Four in ten travelers say that interest in other domestic destinations is a most important factor impacting their travel choices.***

Sonoma County Travel Barriers	Importance Rating	Agreement Rating
I'm more interested in visiting other domestic destinations than Sonoma.	43.2%	61.1%
Sonoma County is just not on my radar as a travel destination.	28.9%	52.6%
San Francisco's problems have made visiting that city (and by extension, Sonoma) less attractive.	27.8%	41.8%
I'm more interested in visiting international destinations than Sonoma.	25.1%	48.6%
I don't know a lot about the things to see and do in Sonoma County.	21.5%	39.8%
Personal financial concerns keep me from visiting Sonoma County more often.	18.8%	28.2%
The high cost of visiting Sonoma County keeps me from visiting more often.	17.0%	34.6%
Wine tasting experiences have become less attractive (more expensive, difficult reservations, etc.).	13.3%	39.5%
Other wine country regions are more appealing than Sonoma County.	11.3%	22.4%
Sonoma County is challenging for me to get to.	11.0%	24.0%
Overall, as a destination, Sonoma County does not offer good value for the money.	8.8%	21.6%
Been there, done that. I'm not interested in visiting Sonoma County again.	8.6%	13.4%
Concerns about natural disasters (floods, wildfires, etc.) have made visiting Sonoma County less attractive.	4.1%	11.8%
Sonoma County's tourism advertisements turned me off from visiting.	1.4%	2.3%



# The economic climate in 2023 also negatively impacted trip volume and spend for this audience.

**Question:** Now please think about your travel this year (2023) compared to the previous year (2022).

**How did the economic climate influence your travel decision-making this year (i.e., in 2023)?**  
**Due to the economy, this year I have**

**Base:** Total. 800 completed surveys.

**Economic Climate Impact on Travel Plans**

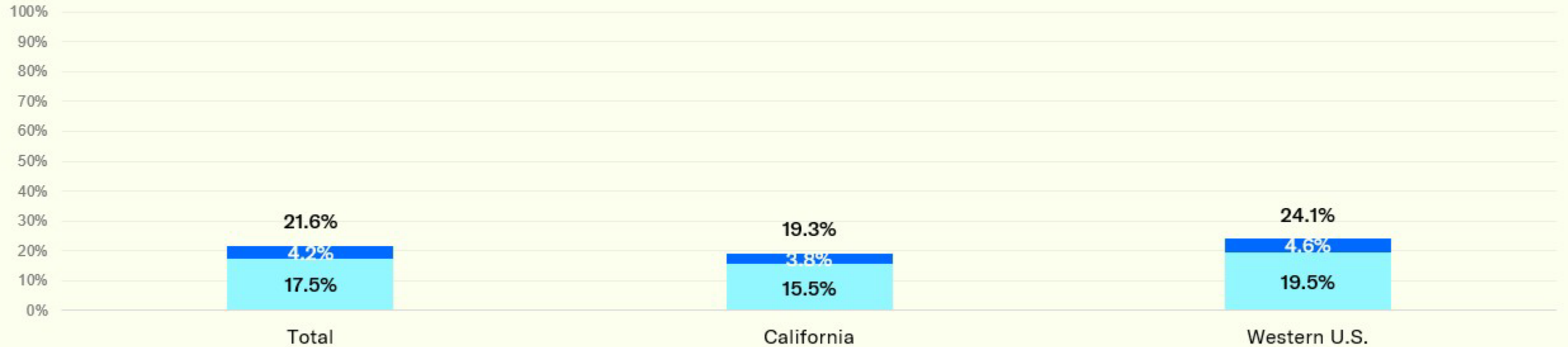


# Despite cost concerns, just one in five travelers say that Sonoma County does not offer good value for money.

This jumps up to nearly a quarter (24.1%) for Western U.S. residents.

Overall, as a destination, Sonoma County does not offer good value for the money.

Agree Strongly agree



Question: Overall, as a destination, Sonoma County does not offer good value for the money.

Base: Total. 800 completed surveys.

# Overall, international travel did not appear to replace domestic vacations in 2023.

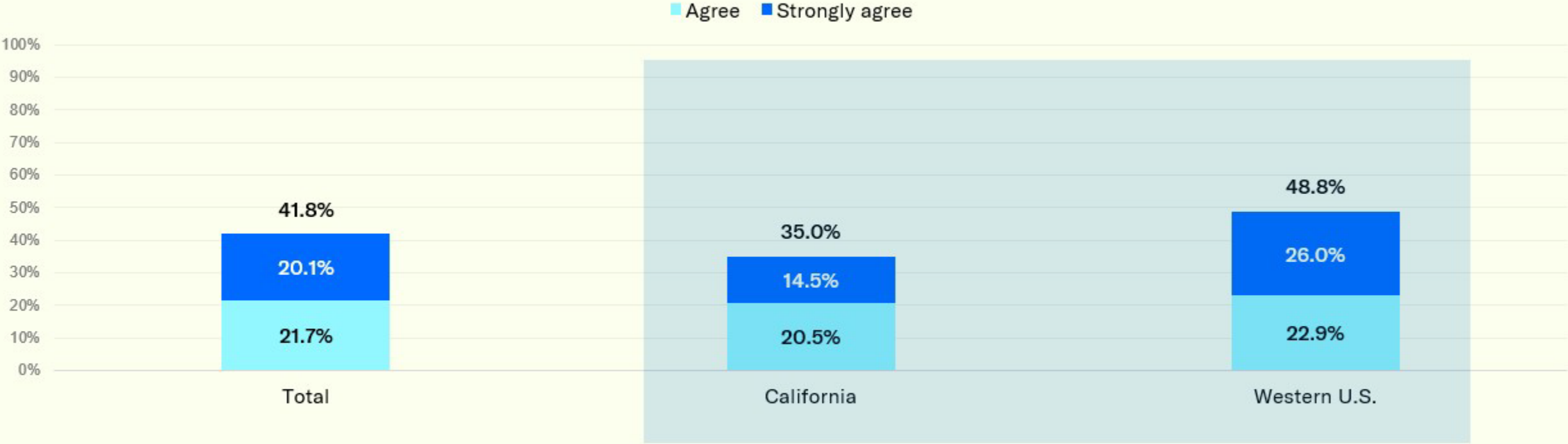


Question: How did the number of OVERNIGHT INTERNATIONAL TRIPS you took this year (2023) change compared to the previous year (2022)?

Base: Total. 800 completed surveys.

# San Francisco's urban woes are a significant challenge to Sonoma's performance.

San Francisco's problems have made visiting that city (and by extension, Sonoma County) less attractive.



Question: San Francisco's problems have made visiting that city (and by extension, Sonoma County) less attractive.

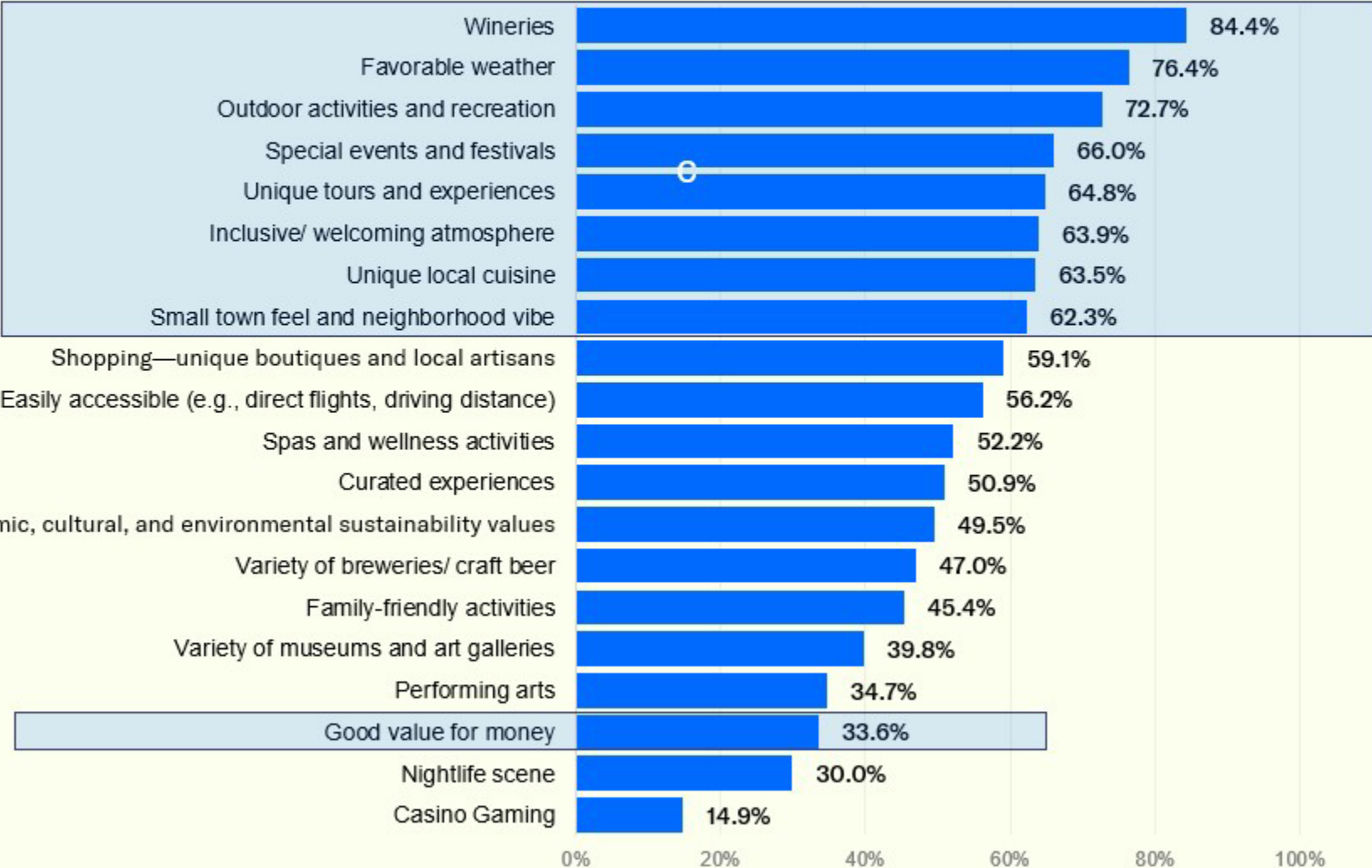
Base: Total. 800 completed surveys.

**Despite these challenges, Sonoma's brand is strong and remains a highly desired wine country destination, second only to Napa.**

Wine Country Visitation (Source: The State of the American Traveler)	Visited in the Past Two Years	Likely to Visit in the Next Two Years
Napa Valley, California	6.9%	15.3%
Sonoma County, California	5.2%	12.3%
Finger Lakes, New York	4.8%	10.7%
Sedona (Verde Valley), Arizona	4.0%	10.8%
Albuquerque, New Mexico	4.3%	10.6%
Paso Robles, California	4.4%	10.6%
Willamette Valley, Oregon	3.8%	10.6%
Palisade, Colorado	3.2%	10.7%
Temecula, California	4.5%	10.0%
Lodi, California	4.2%	9.9%
Fredericksburg, Texas	3.6%	10.3%
Loudoun County (Leesburg) , Virginia	3.6%	9.7%
North Fork, Long Island, New York	3.6%	9.1%
Walla Walla, Washington	2.9%	9.8%
Snake River Valley, Idaho	2.8%	9.6%
Santa Ynez Valley, California	3.2%	9.3%
Woodinville, Washington	2.7%	9.4%
Yakima Valley, Washington	2.8%	8.4%

# Travelers rate Sonoma County highest for wineries, favorable weather, and outdoor recreation.

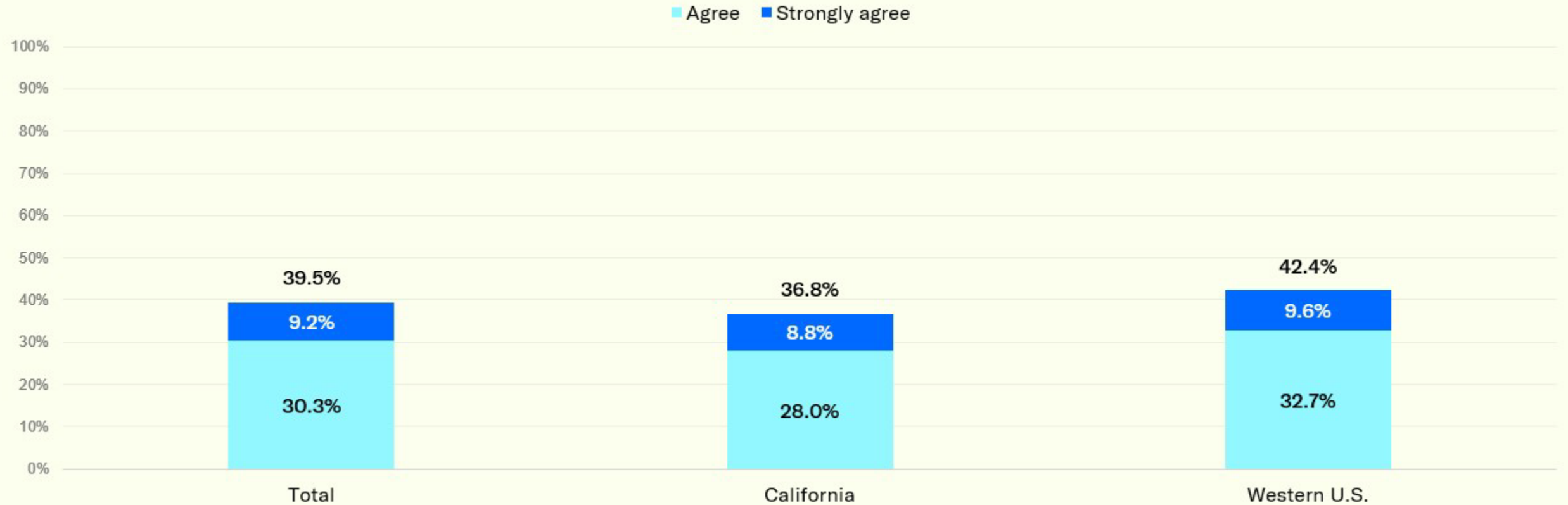
% Rating each as Good or Very Good in Sonoma County



Question: Now please tell us how good you consider Sonoma County to be for each of these travel destination attributes.  
 Base: Total. 800 completed surveys.

# A decline in quality of winery experiences is also impacting perceptions.

Winery experiences have become less attractive overall (more expensive, difficult reservations, etc.).



Question: Winery experiences have become less attractive overall (more expensive, difficult reservations, etc.).

Base: Total. 800 completed surveys.

# Still, most respondents are unlikely to say other wine regions are more appealing than Sonoma.

Other wine country regions are more appealing than Sonoma County.

Agree Strongly agree



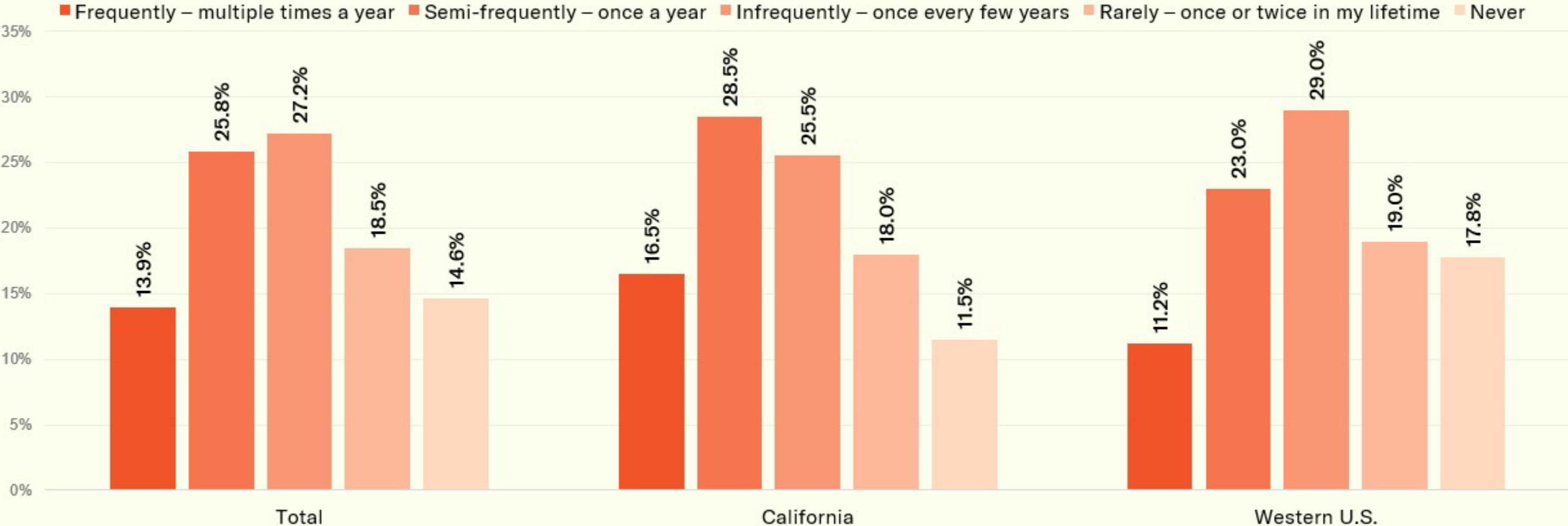
Question: Other wine country regions are more appealing than Sonoma County.

Base: Total. 800 completed surveys.



# Semi-frequent to infrequent winery visits were most common.

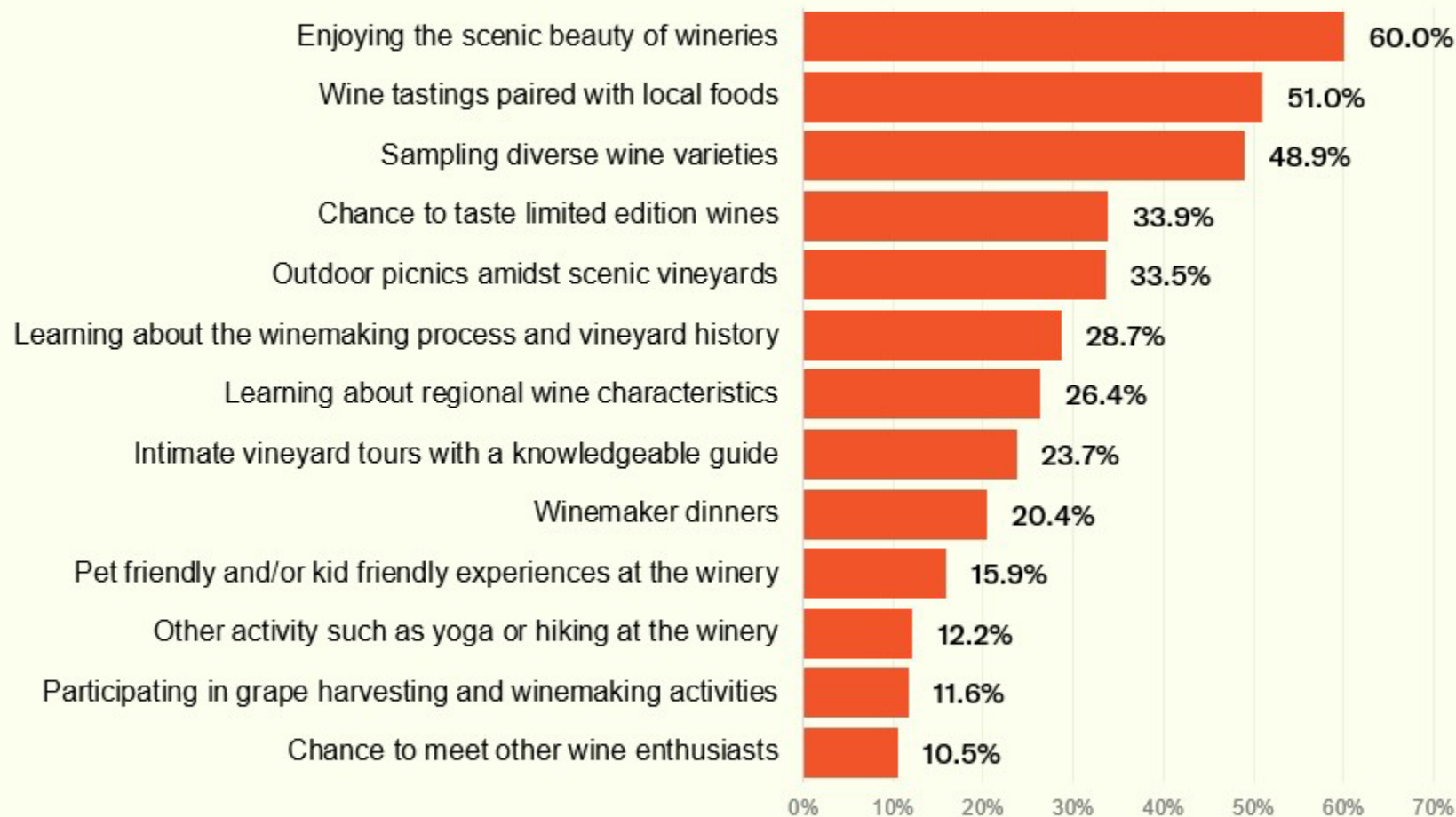
Frequency of Winery Visitation



Question: How often do you visit wineries?

Base: Total. 800 completed surveys.

# Enjoying scenic beauty, wine with local food pairings, and sampling diverse wines were the top preferred winery experiences

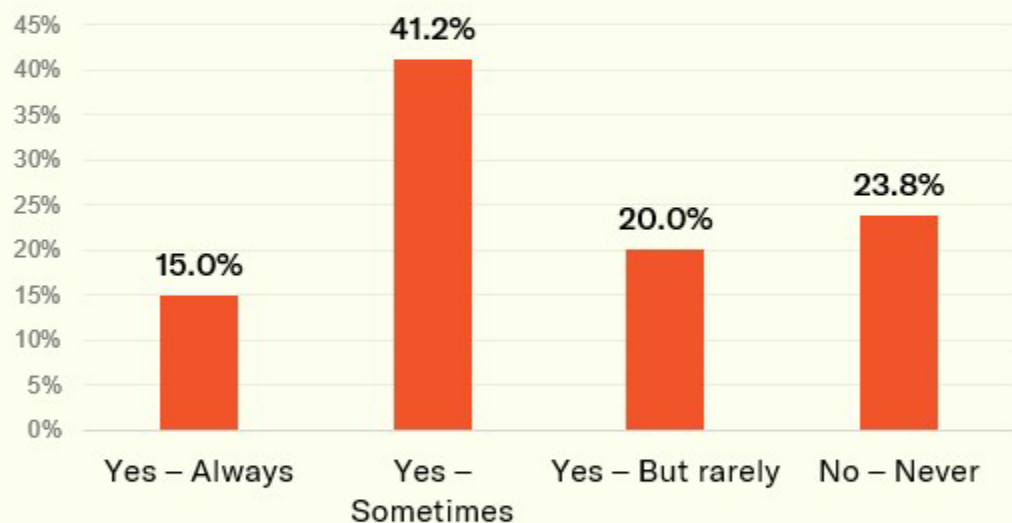


Question: What type of winery experience do you most prefer when visiting wineries?

Base: Winery visitors. 674 completed surveys.

# Most (56%) actively seek out travel destinations that promote responsible tourism practices at least sometimes.

## Seeks out Responsible Travel Destinations

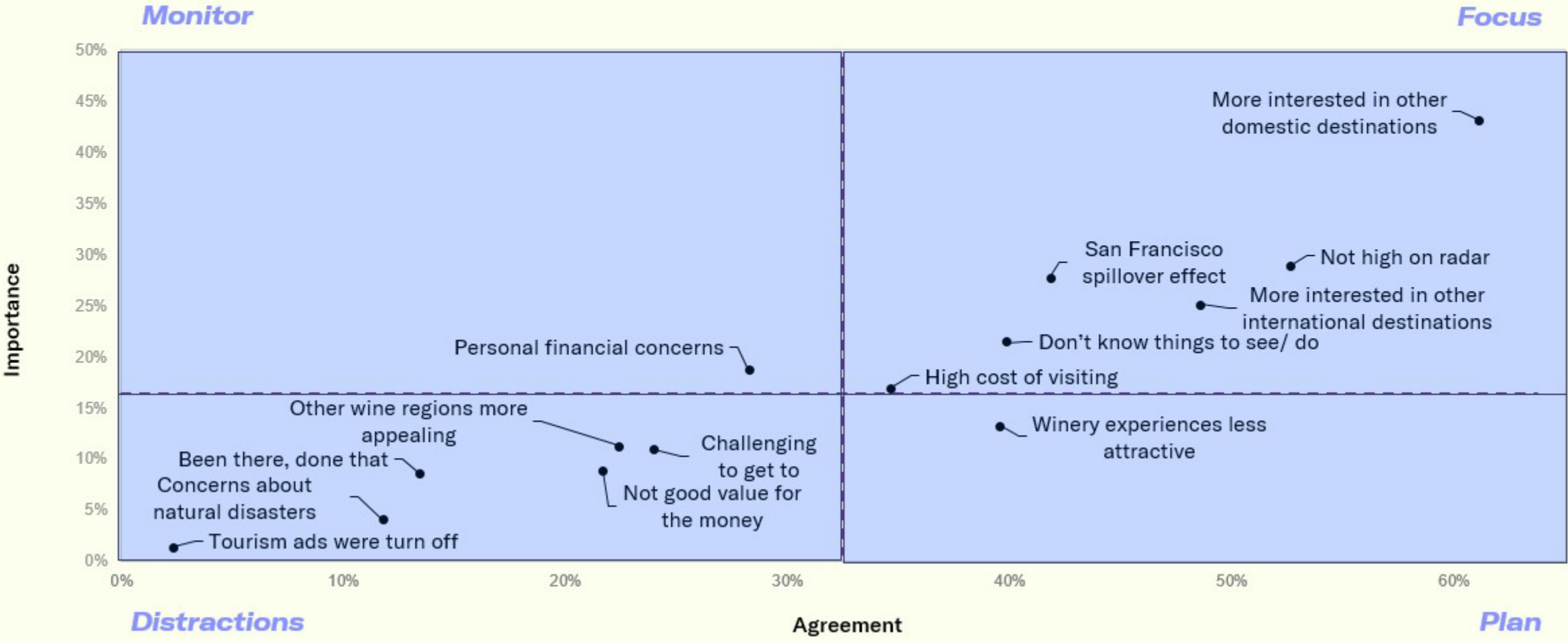


	Total	California	Northern California	Southern California	Western U.S.
Yes - Always	15.0%	14.8%	13.1%	15.5%	15.3%
Yes - Sometimes	41.2%	44.0%	38.7%	46.0%	38.4%
Yes - But rarely	20.0%	19.8%	26.3%	17.1%	20.2%
No - Never	23.8%	21.5%	21.9%	21.4%	26.1%

Question: Do you actively seek out travel destinations that promote responsible tourism practices when making your travel decisions?

Base: Total. 800 completed surveys.

# Maintaining focus on *what matters to travelers* is key.







# SONOMA COUNTY HOSPITALITY ASSOCIATION

**Leland Fishman**  
SCHA Membership Chair

**Tiffani Montgomery**  
SCHA Contract Executive Director



## ADVOCATE. USE YOUR VOICE!

We are the unified voice of Sonoma County hospitality and tourism, representing our interests and concerns with local government officials, and identifying issues of importance in the areas of workforce and affordable housing, taxes, fair competition, and development.



## EDUCATE. LEARN NEW TOOLS.

Throughout the year, SCHA regularly hosts seminars to offer useful tools for your success, as well as valuable access to forums featuring qualified experts and suppliers who understand our industry.



## RESOURCES

SCHA is committed to playing a role in our business community and developing interest in our industry. We provide resources and information to our industry.



## NETWORKING

Our membership mixers offer opportunities to make connections, collaborate, and find beneficial partnerships. We host several events each year at venues throughout the county, at no or very slight cost to members.



**SONOMA COUNTY**  
HOSPITALITY ASSOCIATION

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Join our unified advocacy voice.

Build your network of resources and connections.

Workshops + educational opportunities.

Be a part of our industry's community presence through SCHA events and initiatives.



# Audience Activity



# TERRI STARK

## Stark Reality Restaurants, Proprietor and Co-Owner

Terri Stark loves a good time. Growing up in San Mateo California, she was known for throwing multi-course dinner parties for her friends, complete with menus and stemware, while in high school. Little did she imagine that not too many years in the future she'd be the co-owner and operator with her husband Mark of eight thriving restaurants.

The rest of the country has taken notice. Terri and Mark were semifinalists for the 2013 James Beard Award for Outstanding Restaurateur, the food world's equivalent of an Academy Award.



# Thank You!

Next action steps:

- Join or renew your membership today.
- Spread the word- tell others about SCHA and invite a friend.
- Get involved - ask our board members how to join a committee.



**SONOMA COUNTY**  
HOSPITALITY ASSOCIATION

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