

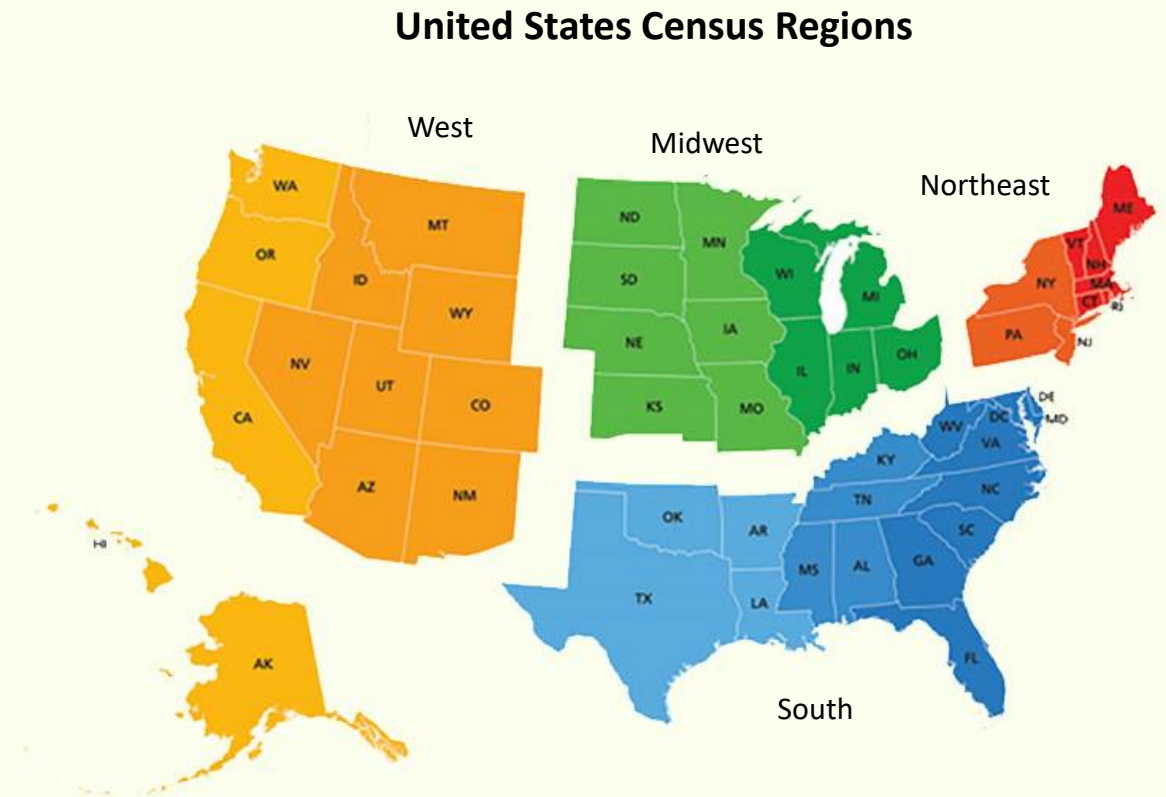
# Future Partners

## The State of the American Traveler

Sonoma Edition

# Methodology

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- 4,000+ fully completed surveys collected each wave. 49,233 total completes for 2024.
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region





A scenic landscape photograph of a vineyard. In the foreground, rows of green grapevines are planted on a hillside, with a dirt path running through them. Large, leafy trees stand behind the vines. In the background, more hills are visible under a hazy, misty sky. The overall tone is peaceful and natural.

# Current Traveler Sentiment



# Question:

**Which of these WINE COUNTRY  
REGIONS have you visited in the  
PAST 12 and which will you be likely  
to visit in the NEXT 12 MONTHS?**



# Question:

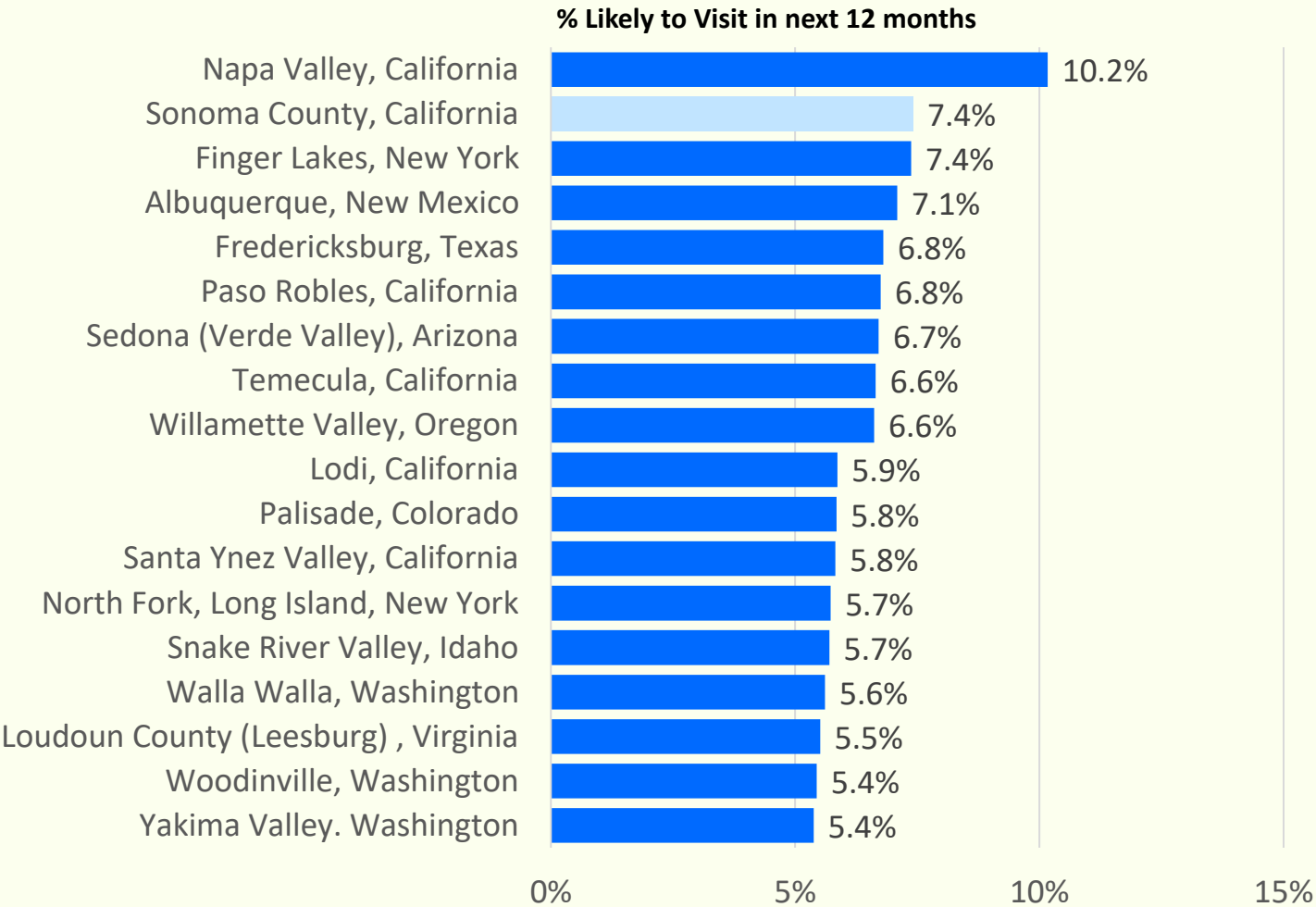
Which of these WINE COUNTRY  
REGIONS have you visited in the  
PAST 12 and which will you be **likely**  
**to visit in the NEXT 12 MONTHS?**



# American travelers rank Sonoma County second amongst wine country regions in likely visitation this year.

**Question:**

Which of these WINE COUNTRY REGIONS have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?



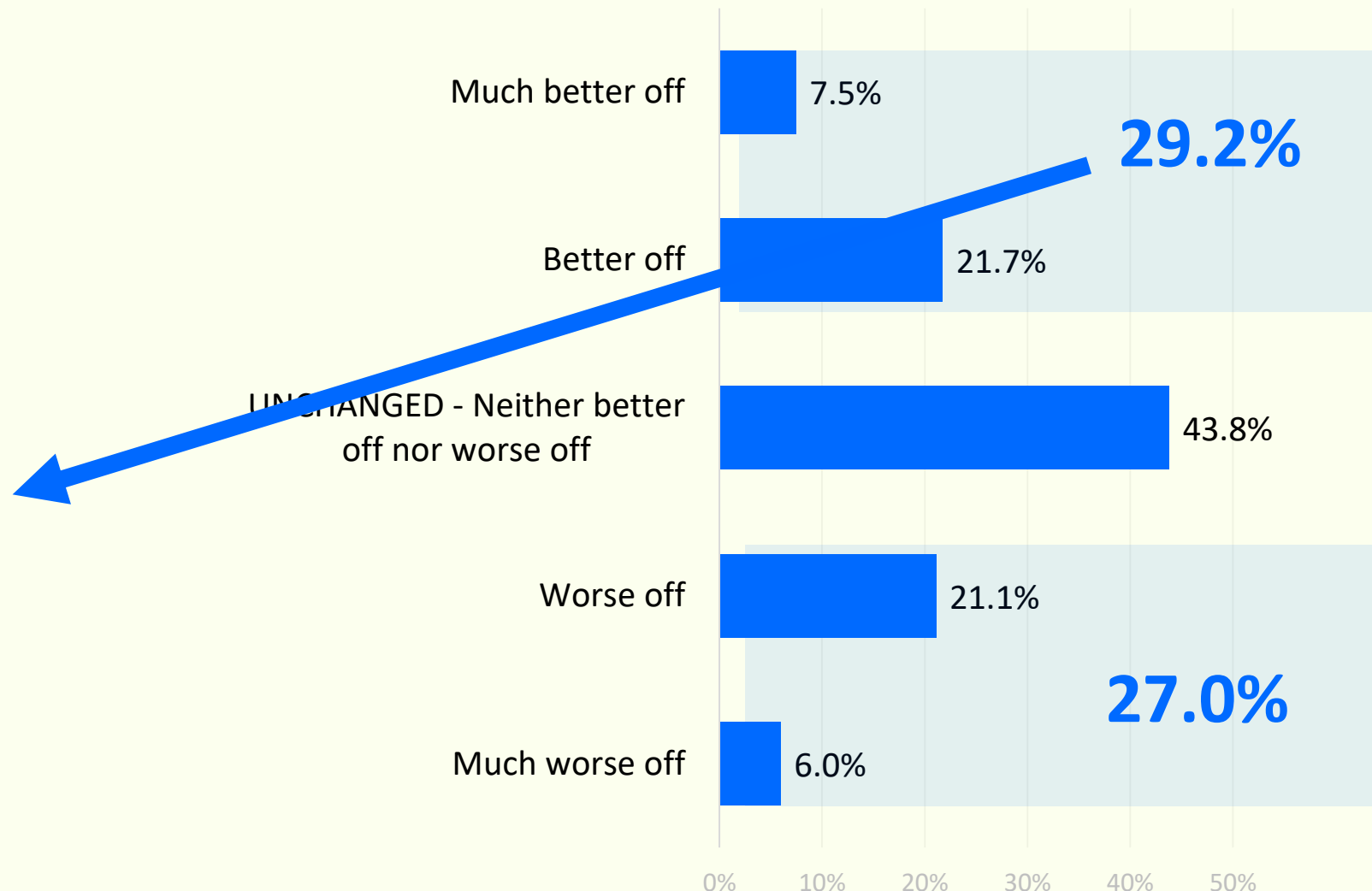
# Travelers' feelings about their current finances deteriorated somewhat this month.

## Question:

Would you say that you (and your household) are better off or worse off financially than you were a year ago?

**37.4%**

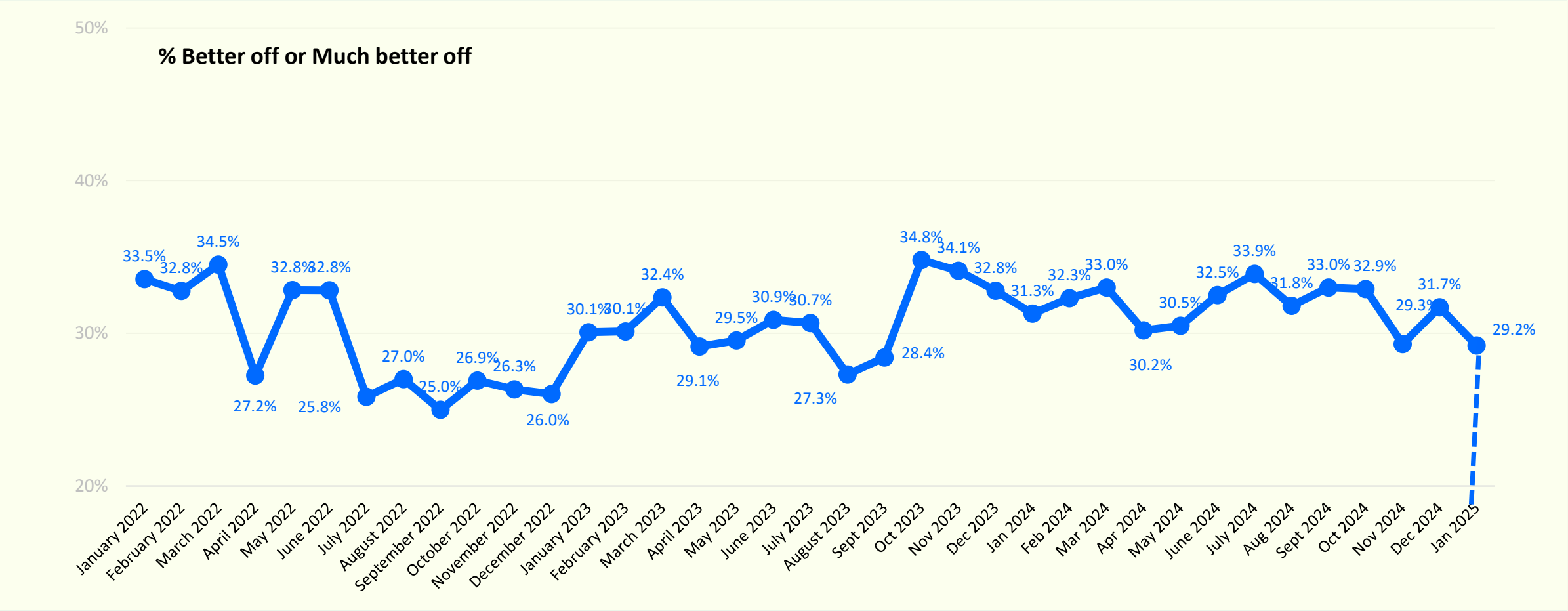
(Likely Sonoma Visitors)



# Travelers' feelings about their current finances deteriorated somewhat this month.

**Question:**

Would you say that you (and your household) are better off or worse off financially than you were a year ago?





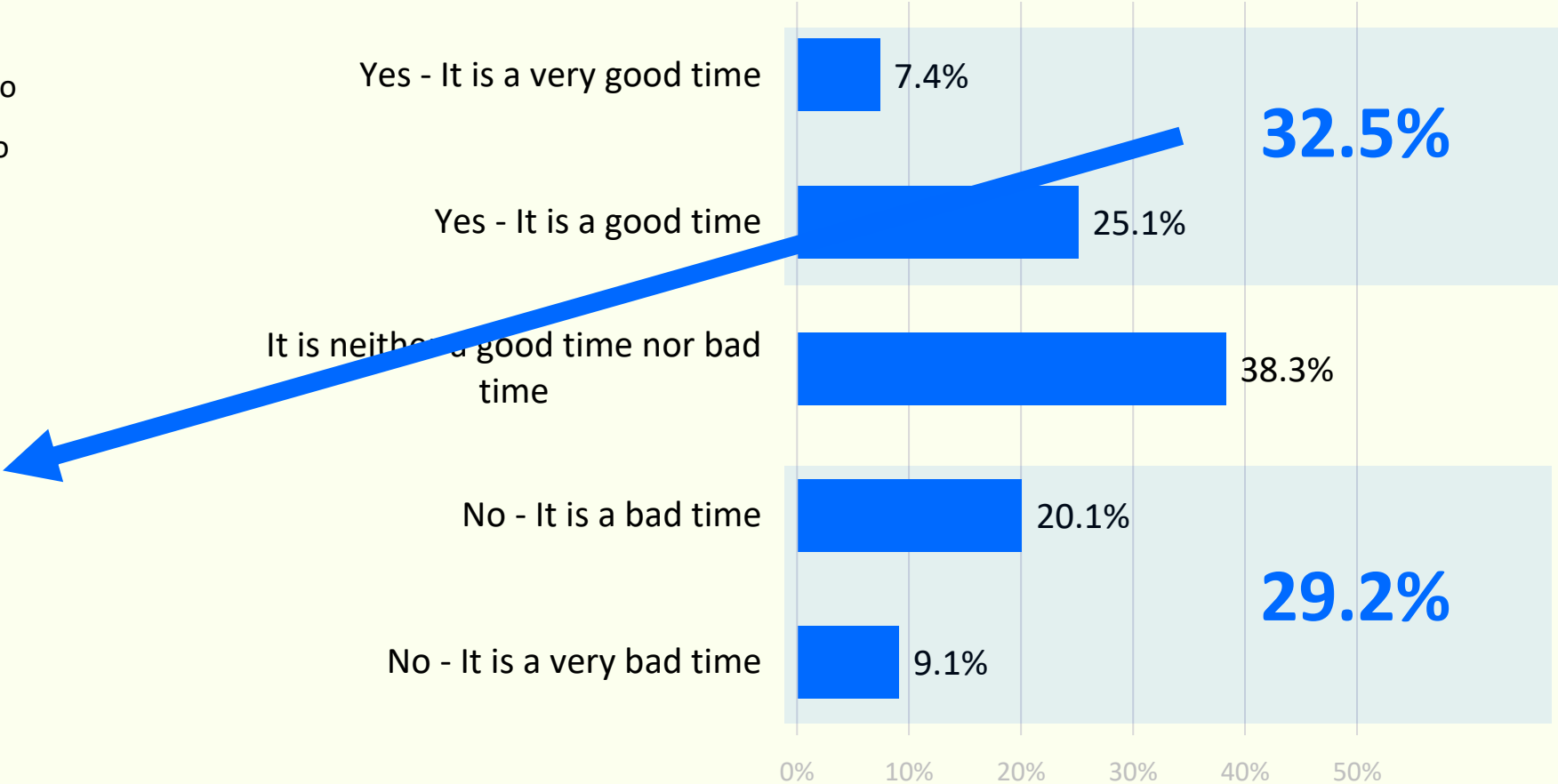
# About one-third of American travelers feel that now is a good time to spend on travel.

## Question:

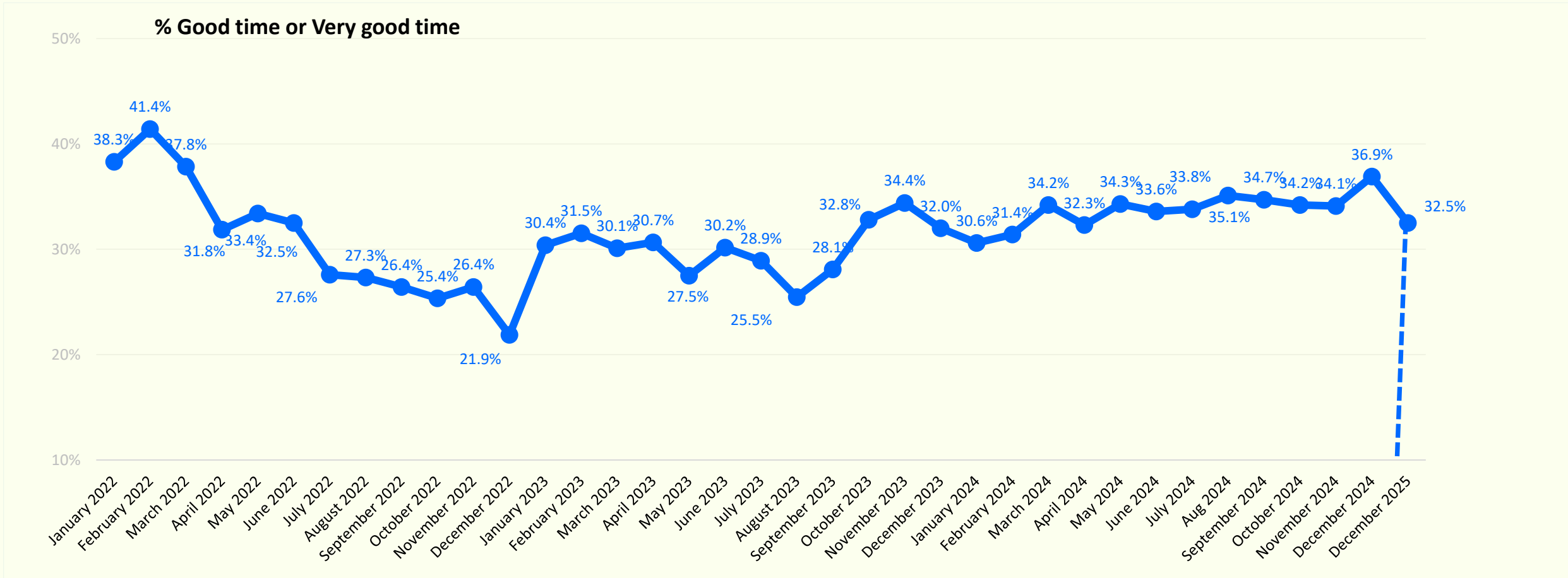
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

37.7%

(Likely Sonoma Visitors)



# About one-third of American travelers feel that now is a good time to spend on travel.



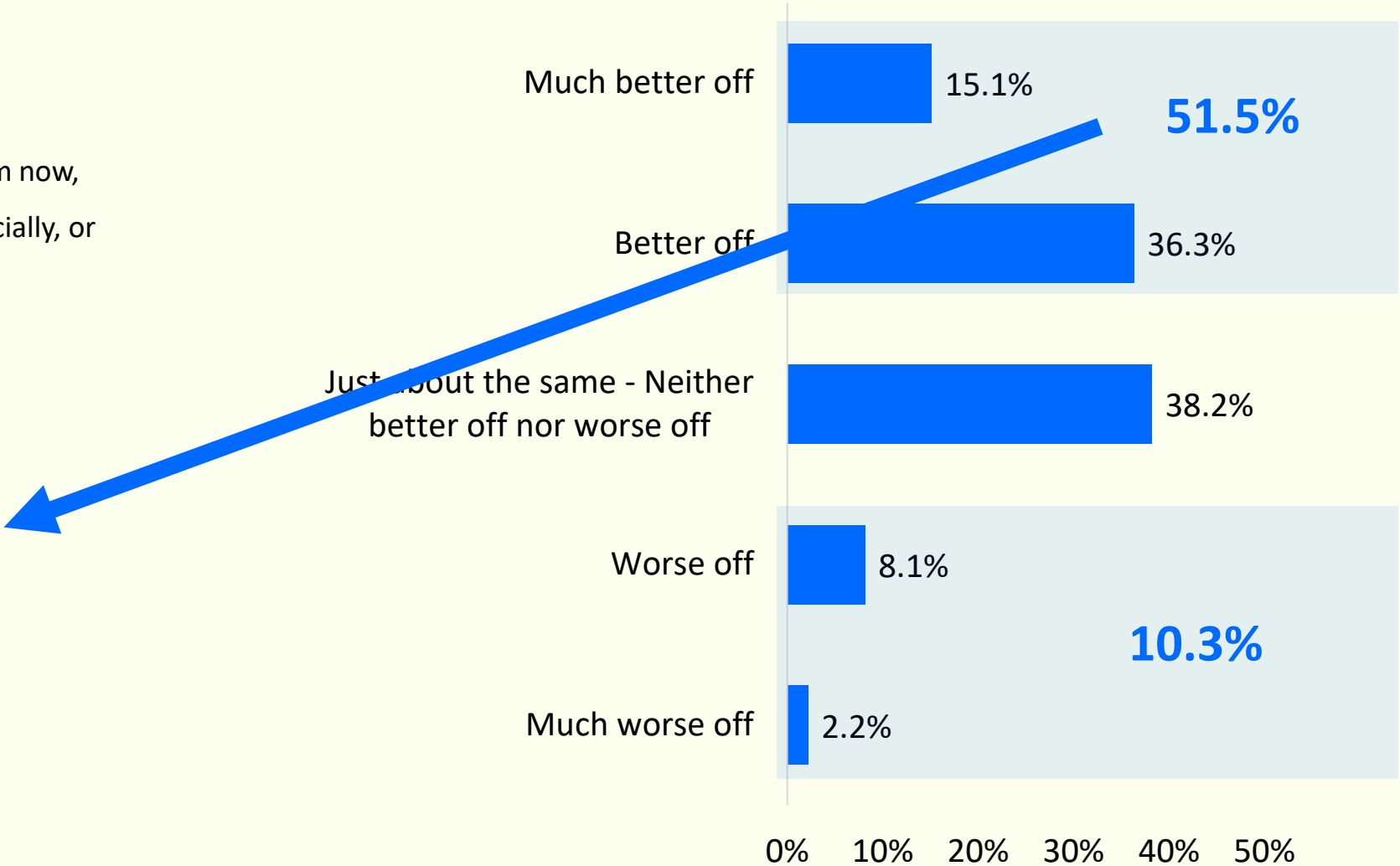
# Travelers remain optimistic about their personal financial outlooks.

## Question:

LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

63.4%

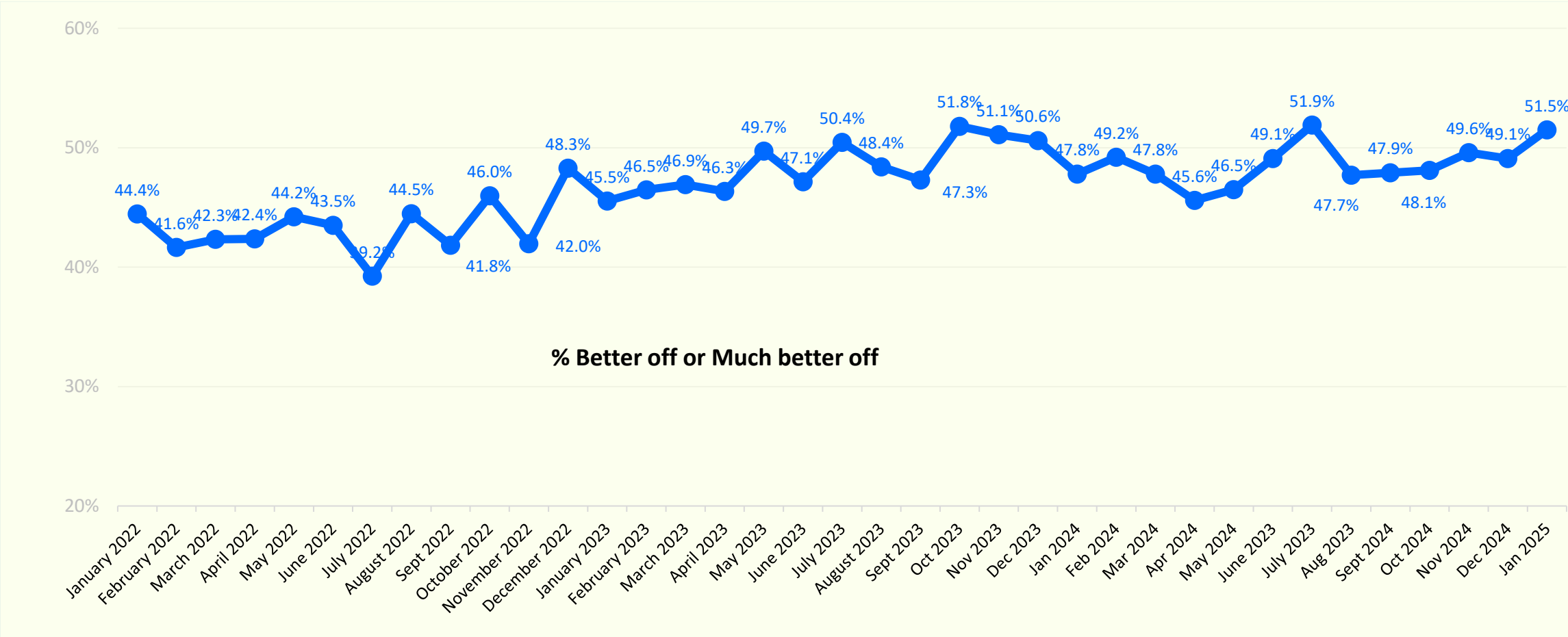
(Likely Sonoma Visitors)





# Travelers remain optimistic about their personal financial outlooks.

**Question:**  
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



# A majority of American travelers intend to make leisure travel a spending priority in the next three months.

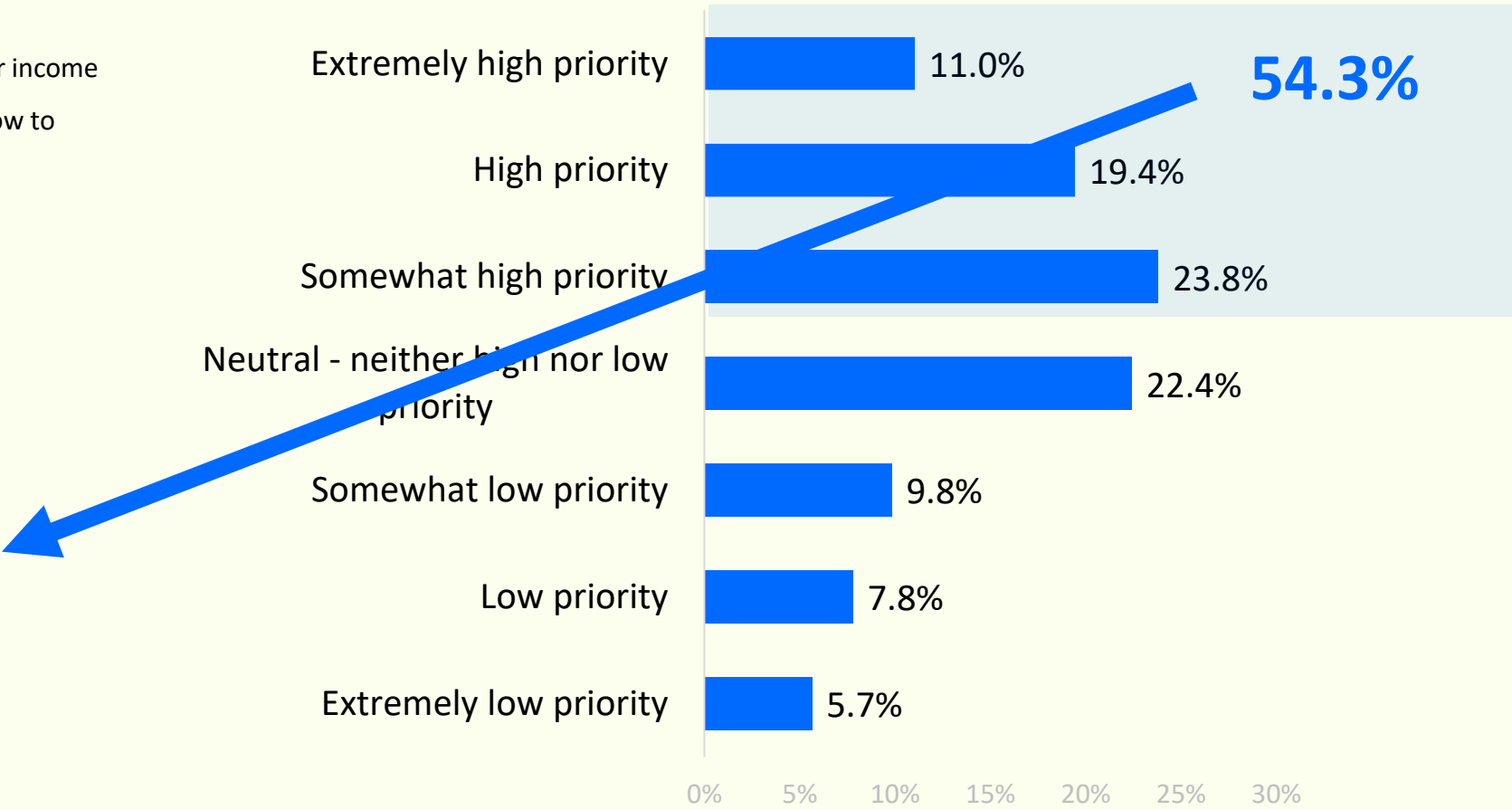
**Question:**

Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) \_\_\_\_\_.

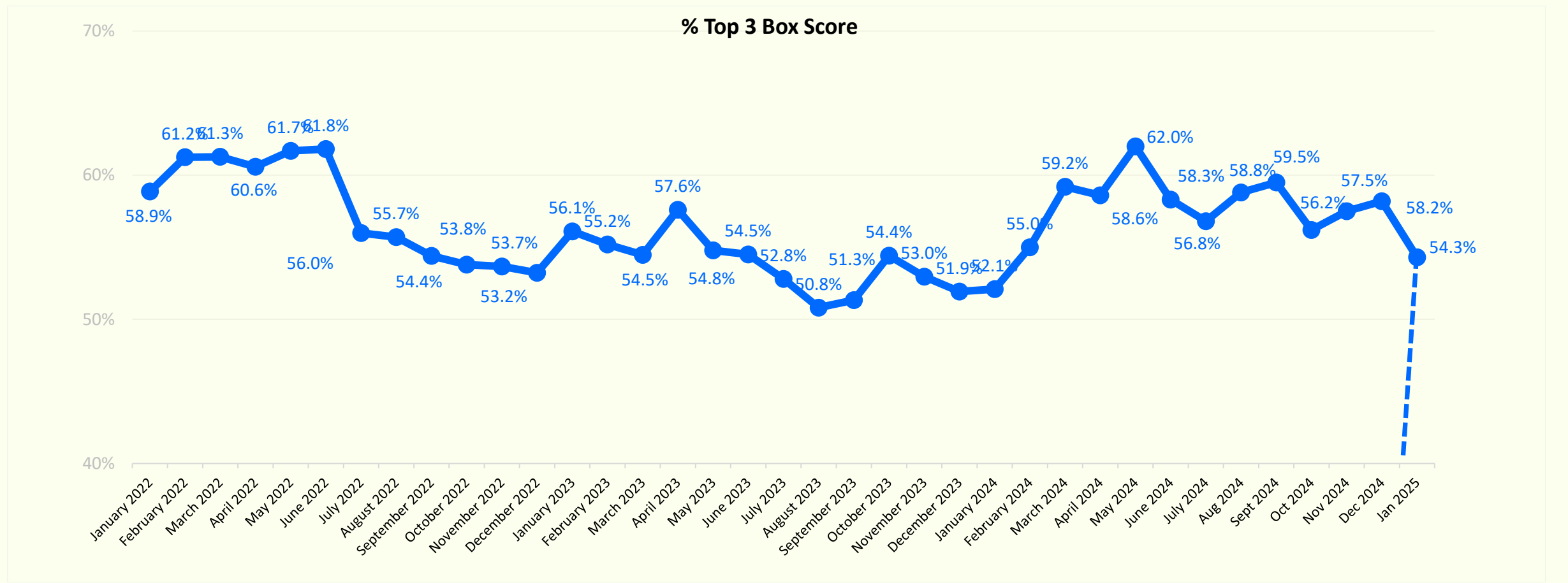
64.2%

(Likely Sonoma Visitors)



# A majority of American travelers intend to make leisure travel a spending priority in the next three months.

**Question:**  
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

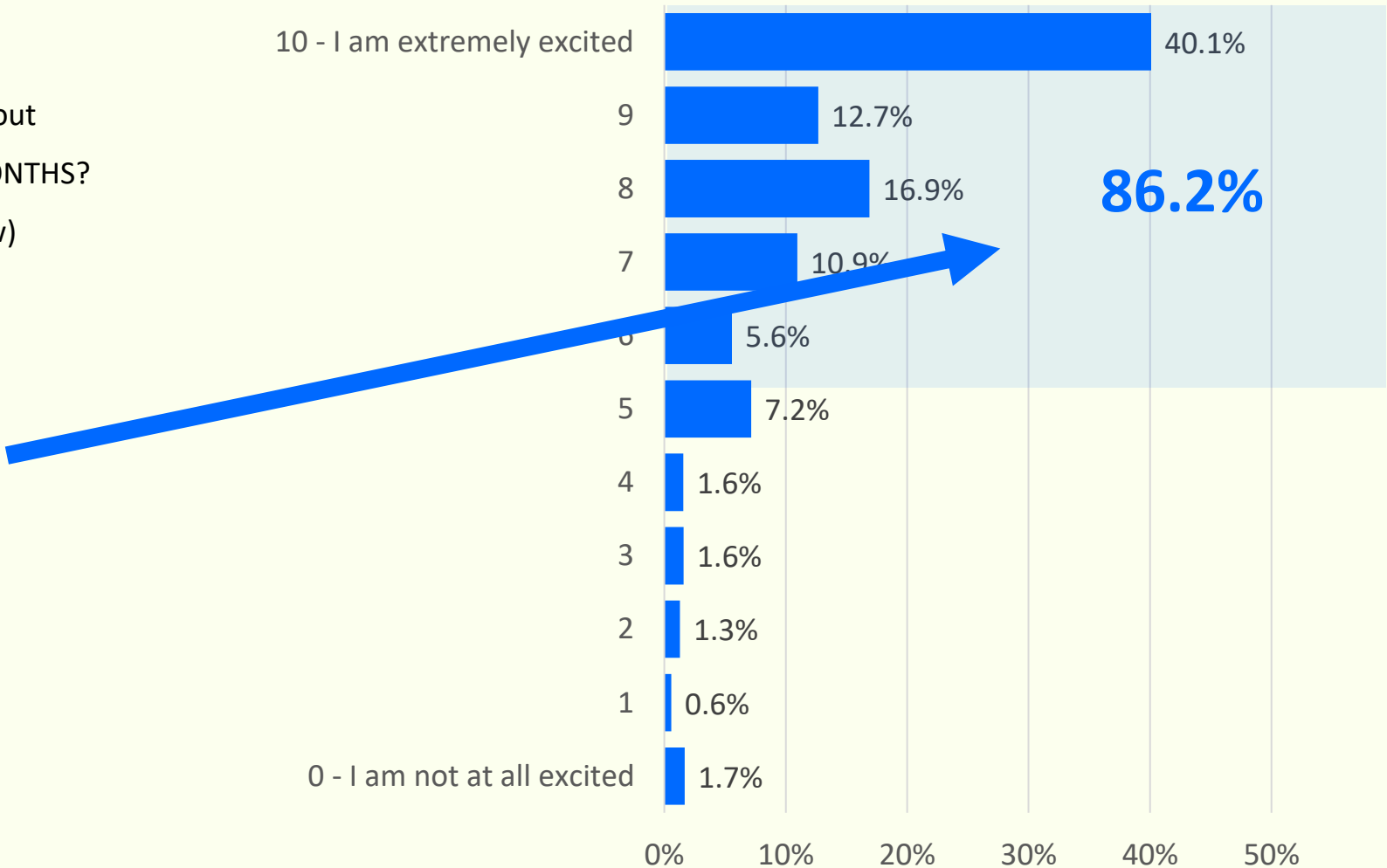




# Energized: Nearly 90% of American travelers register high excitement levels for travel

**Question:**  
Which best describes how excited you are about  
LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?  
(Please answer using the 11-point scale below)

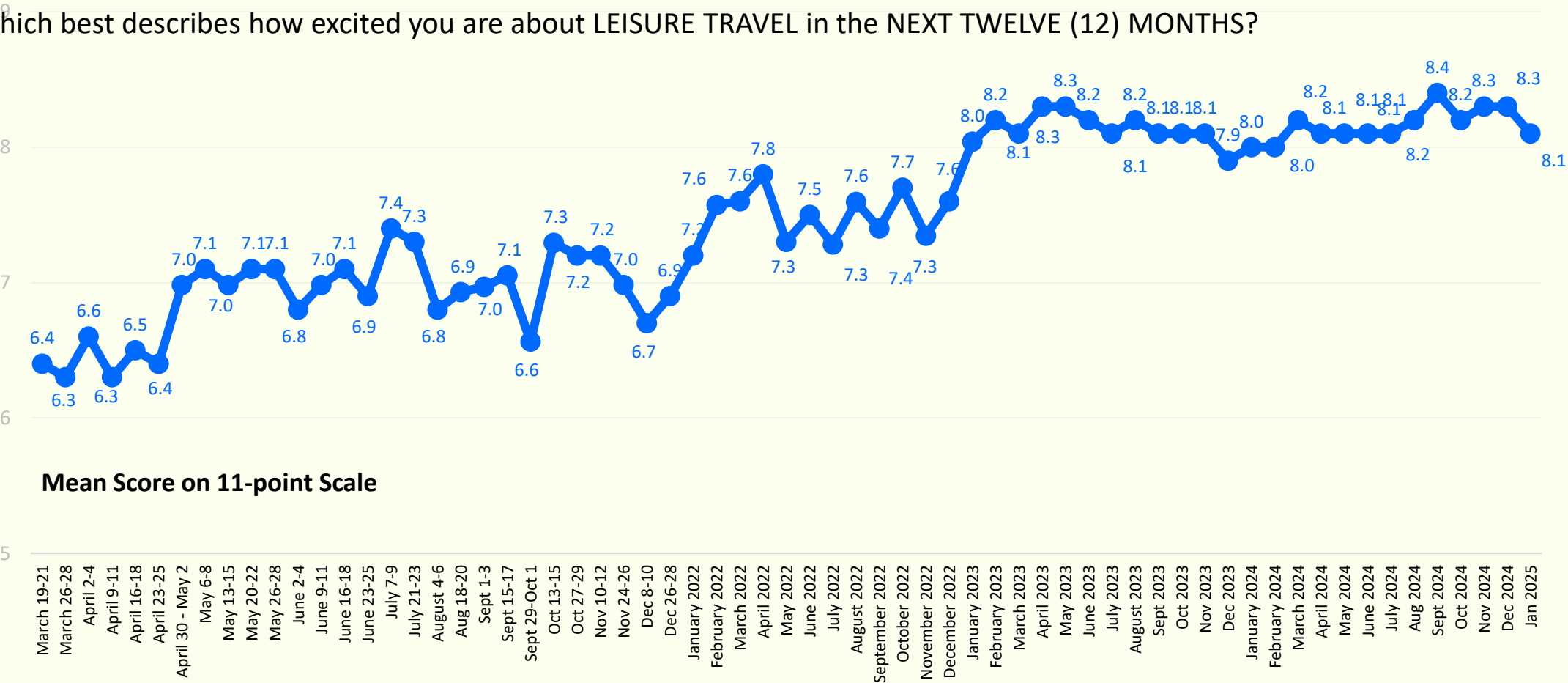
**88.7%**  
(Likely Sonoma Visitors)



# Energized: Nearly 90% of American travelers register high excitement levels for travel

## Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Key Takeaway

- **Some weakness appeared in this month's traveler sentiment data.**
- **Yet, enthusiasm for travel remains high.**
- **Travelers with their eyes on a Sonoma County trip this year show elevated levels of sentiment.**

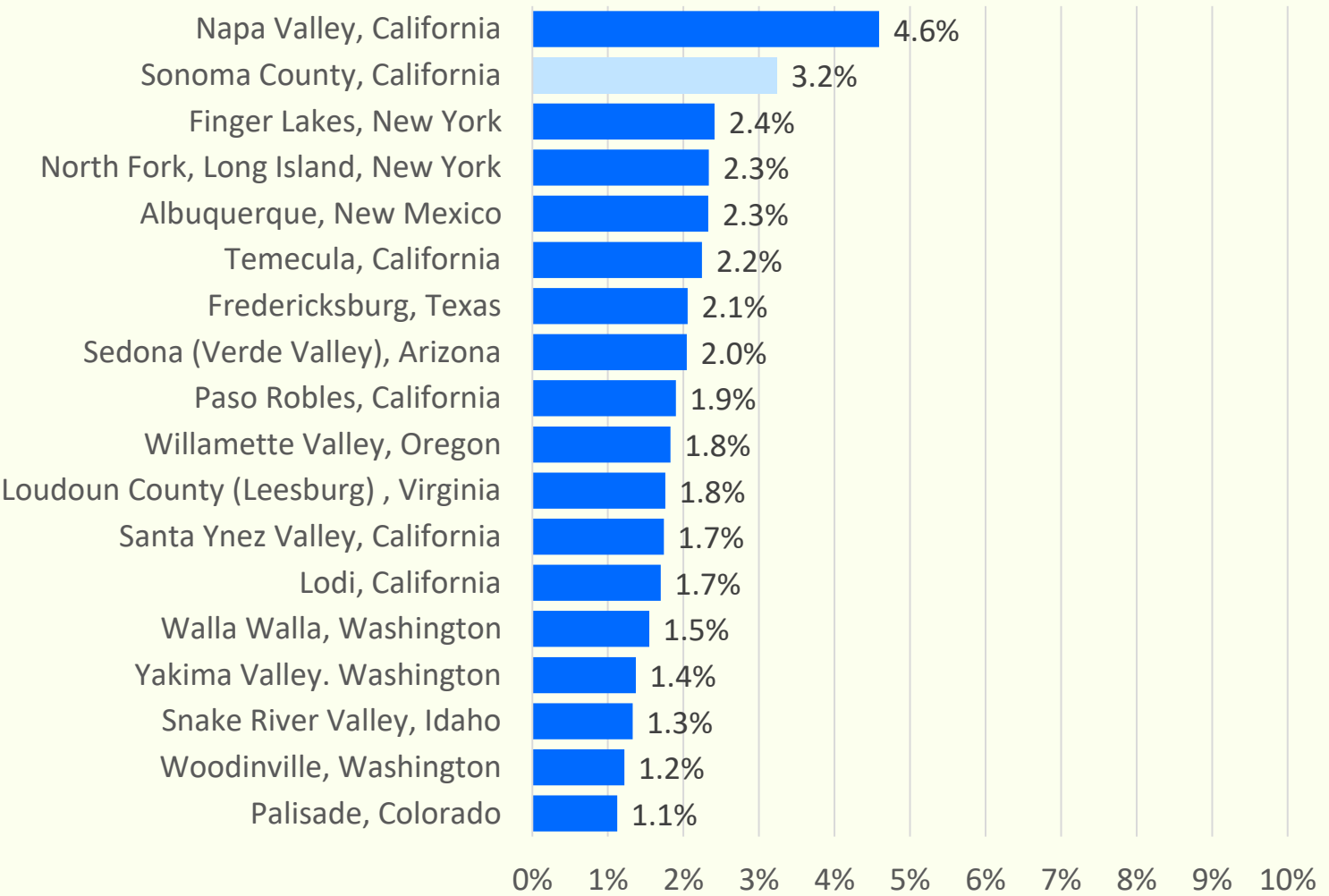




# In 2024, Sonoma County was the second most visited wine country region by domestic travelers.

**Question:**

Which of these WINE COUNTRY REGIONS have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?



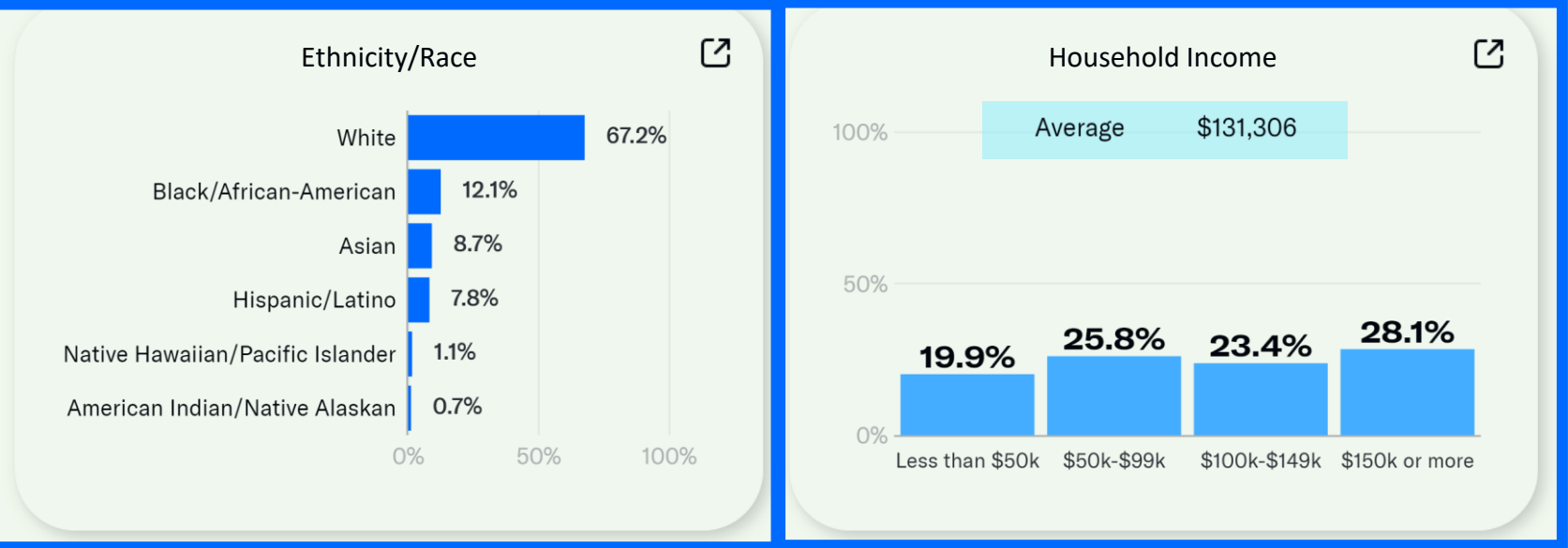
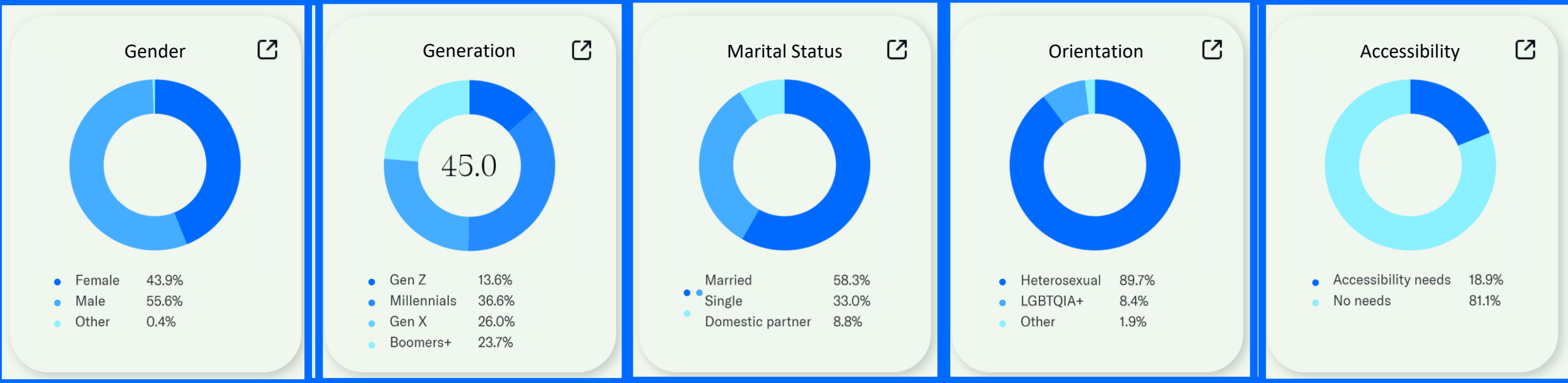
# Demographics



Recent Visitors to Sonoma County, CA (Past 12 Months)

Total

Recent Visitors



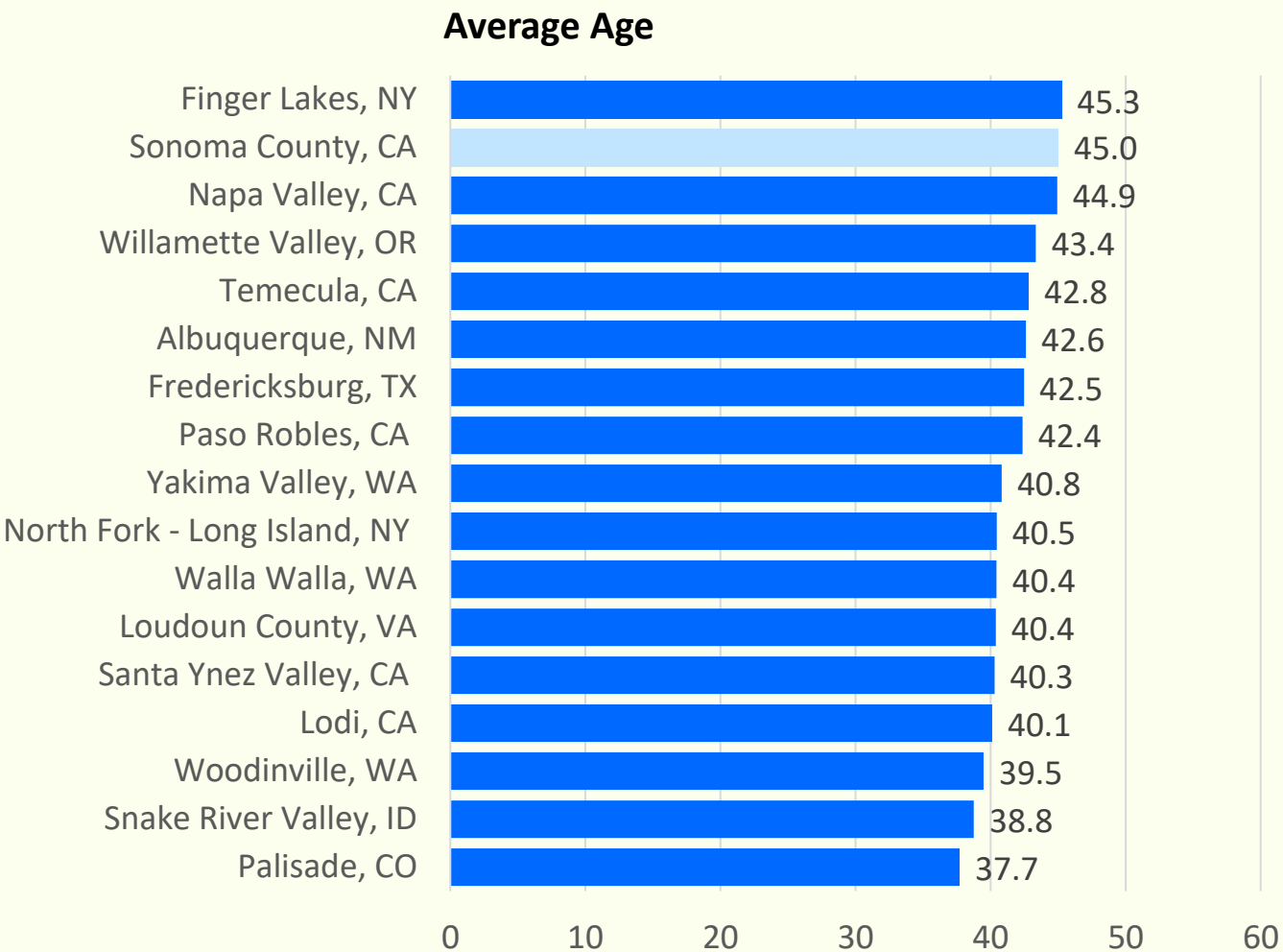
Just for fun, let's look at how Sonoma County compares to other wine country regions.

# Sonoma has one of the older visitor bases, relative to other wine countries.

## Question:

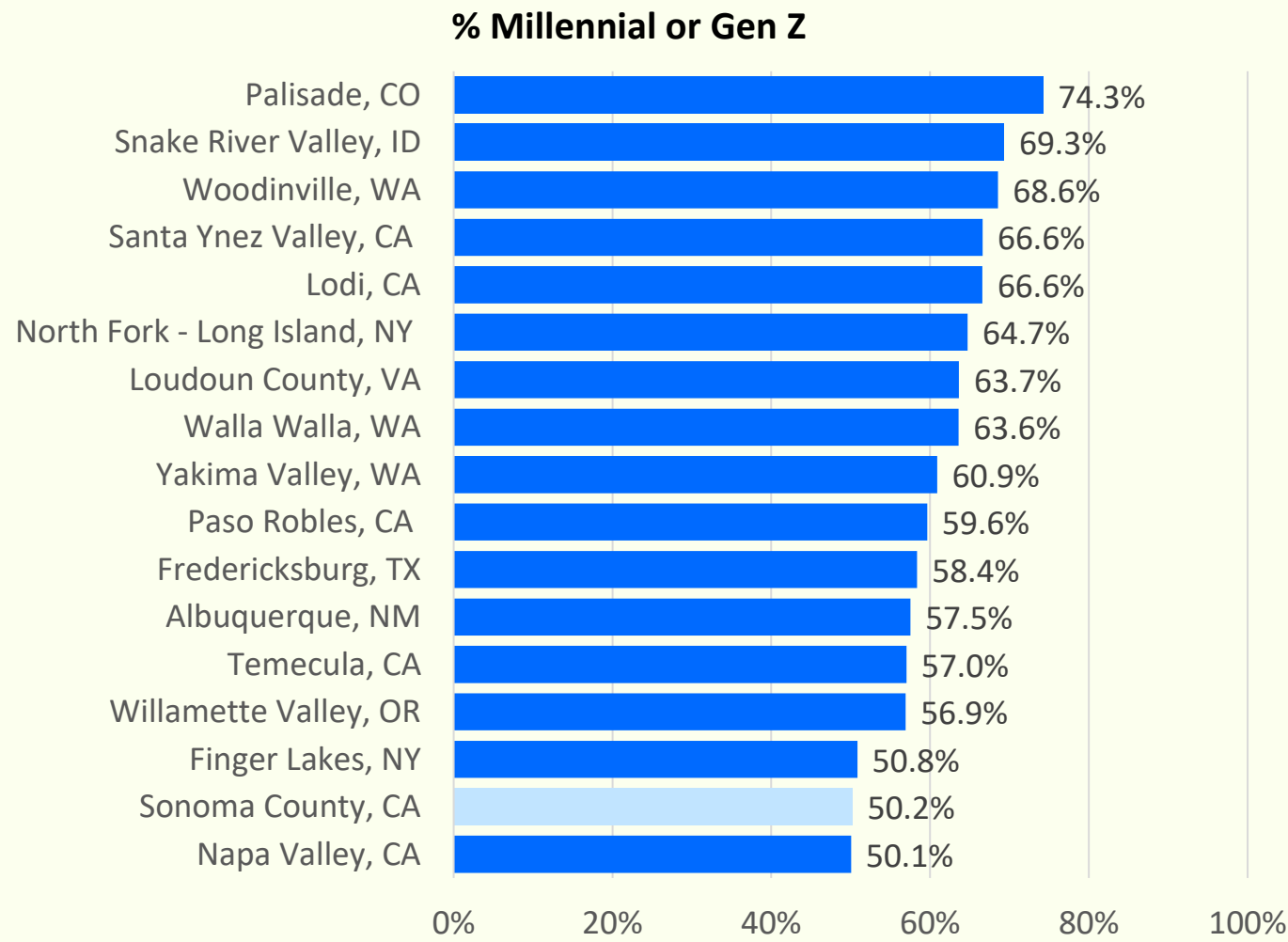
In what year were you born?

49.8  
(National Average)





# Still, more than half of Sonoma’s domestic visitors are either Millennials or from Generation Z

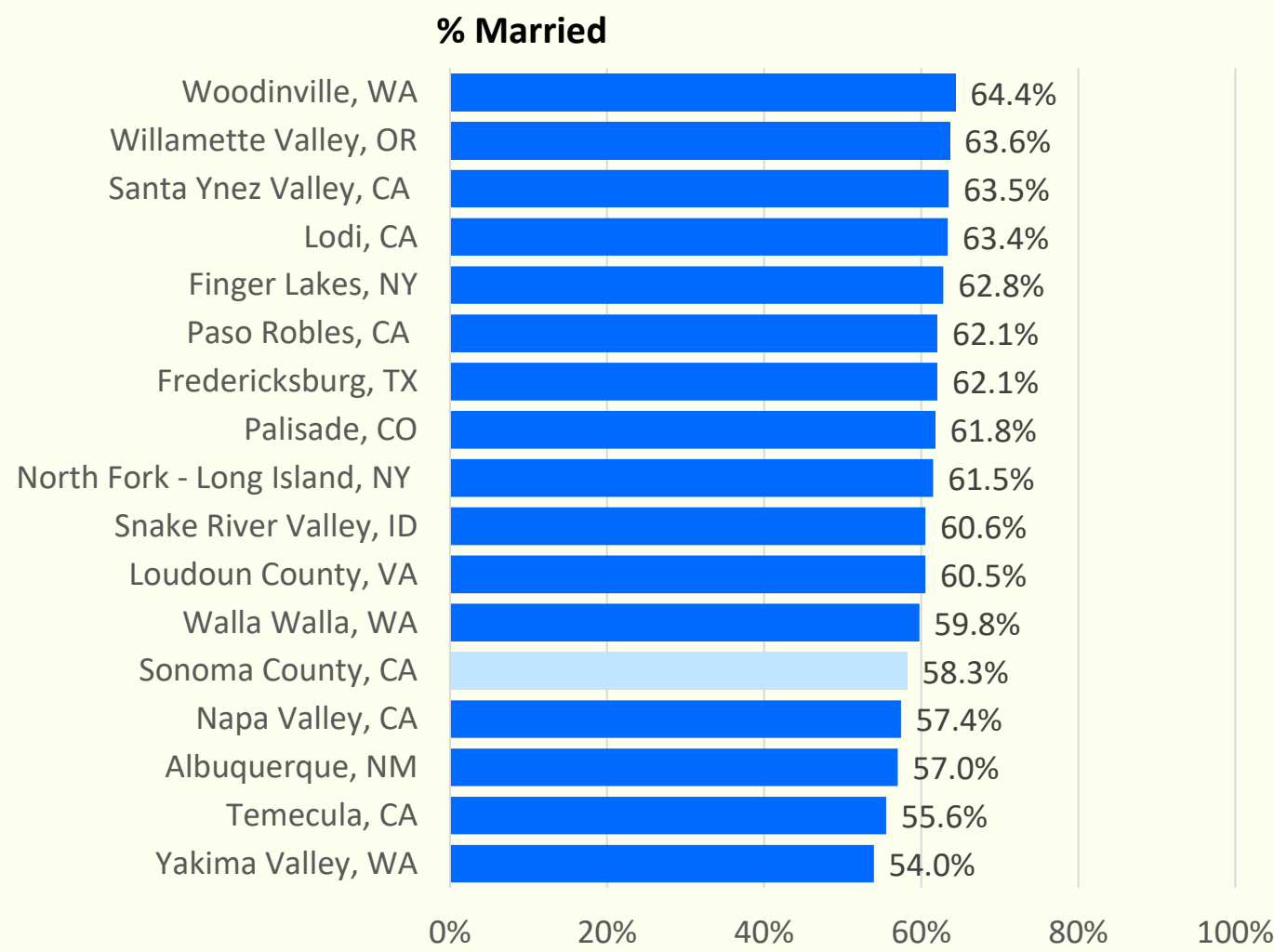


**Question:**  
In what year were you born?

**40.3%**  
(National Average)



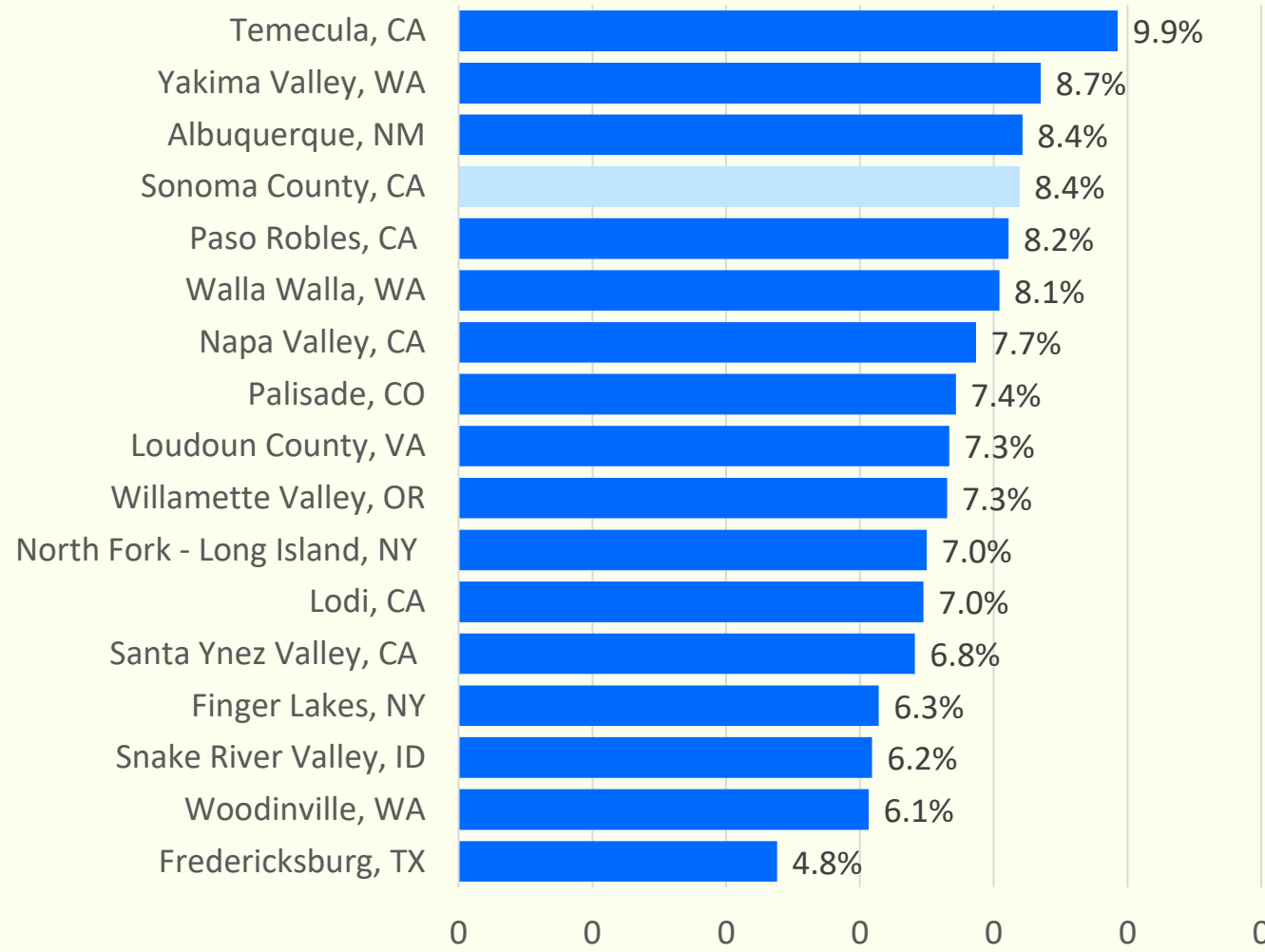
# More than half of Sonoma's visitors are married.



**Question:**  
What is your marital status?

**49.1%**  
(National Average)

# Sonoma is one of the wine country regions with the highest incidence of LGBTQI+ travelers.

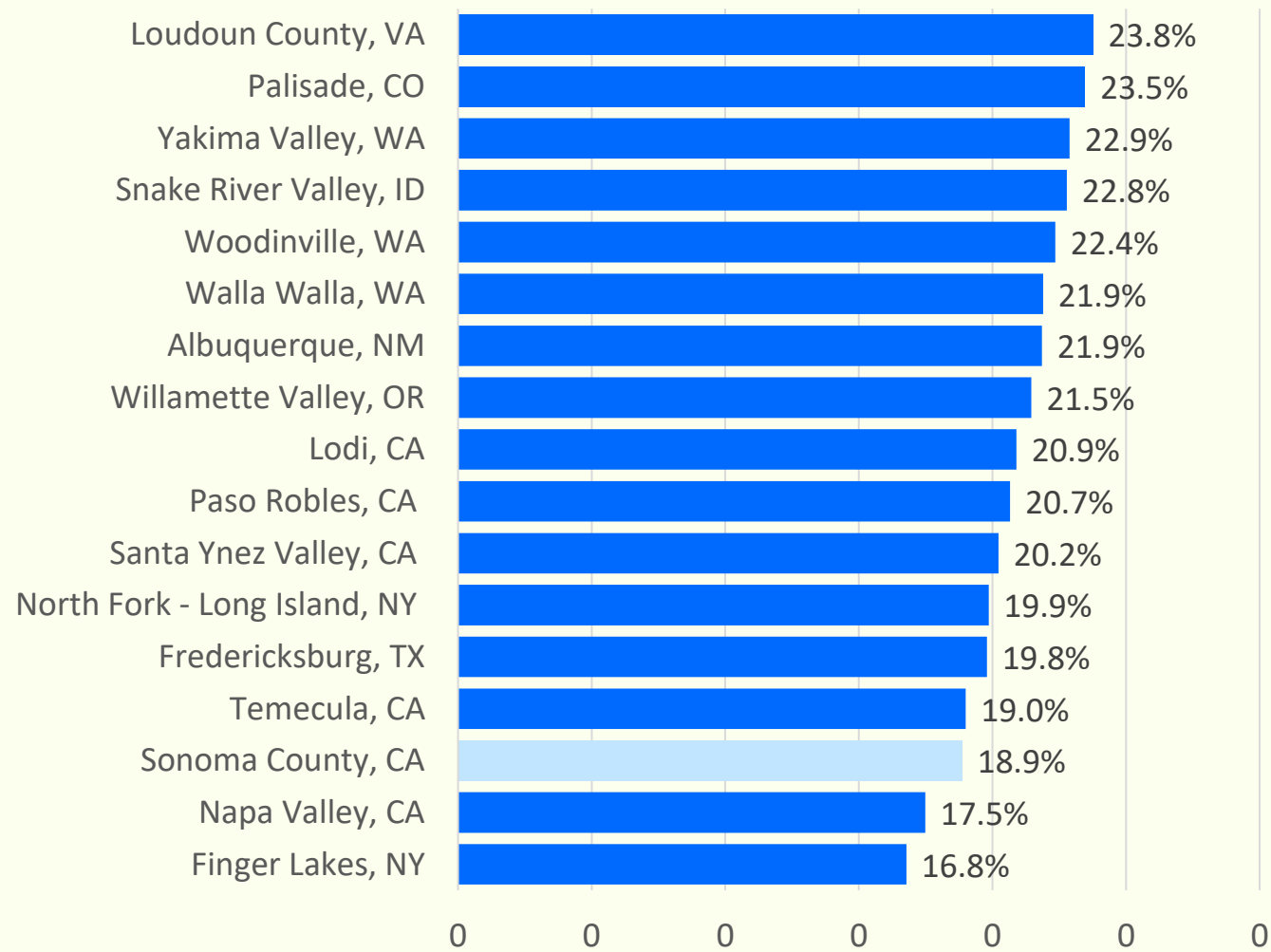


**Question:**

Do you consider yourself LGBTQI+?

**8.1%**  
(National Average)

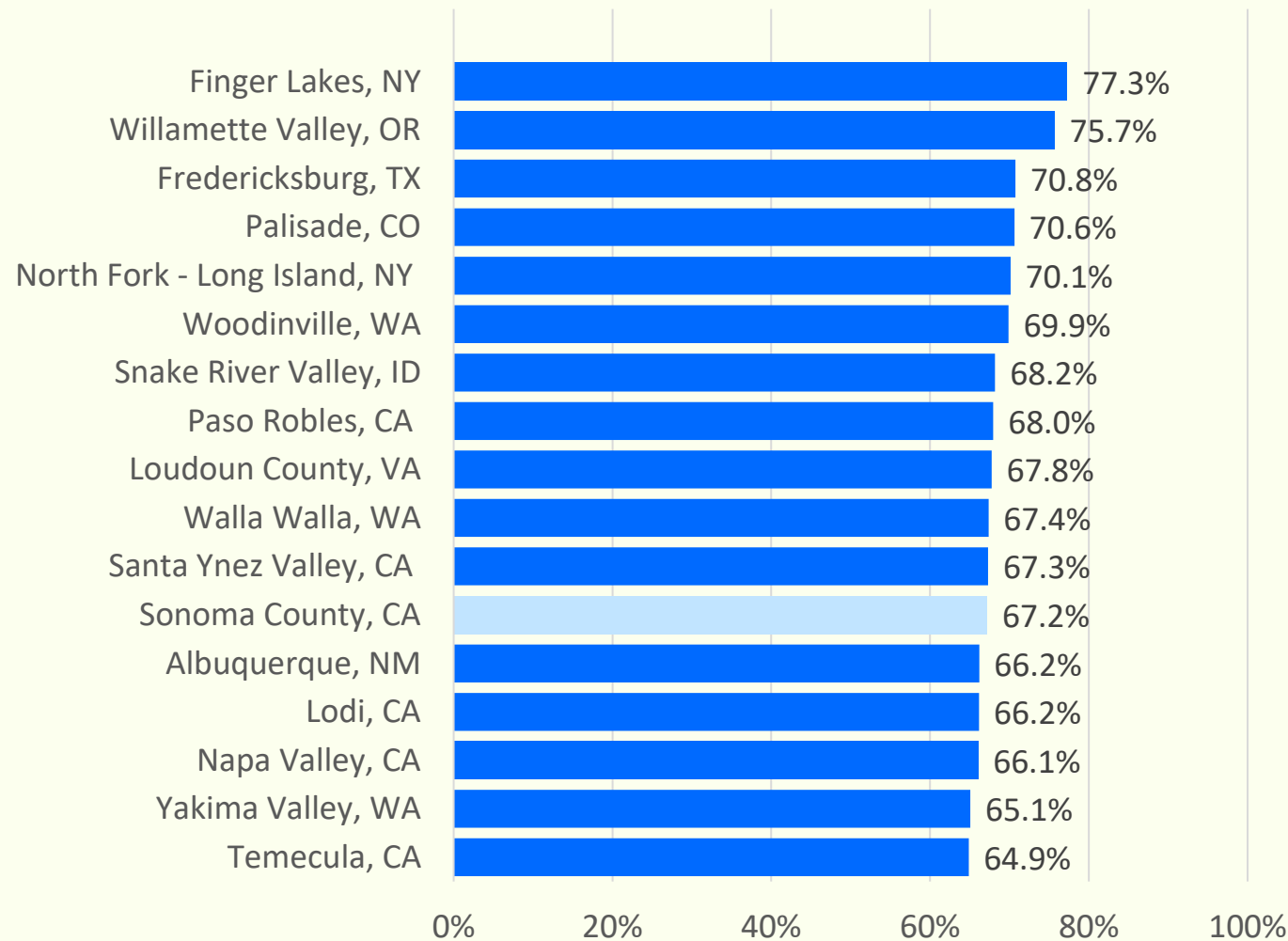
# Sonoma is one of the wine country regions with a lower incidence of travelers with disabilities.



**Question:**  
Because of a physical, mental or emotional issue do you (or anyone you regularly travel with) have difficulties or face challenges traveling?

**14.9%**  
(National Average)

# Sonoma’s visitor base is relatively diverse, with approximately 2-of-3 being Caucasian.



**Question:**  
Which best describes your ethnicity? %  
Caucasian

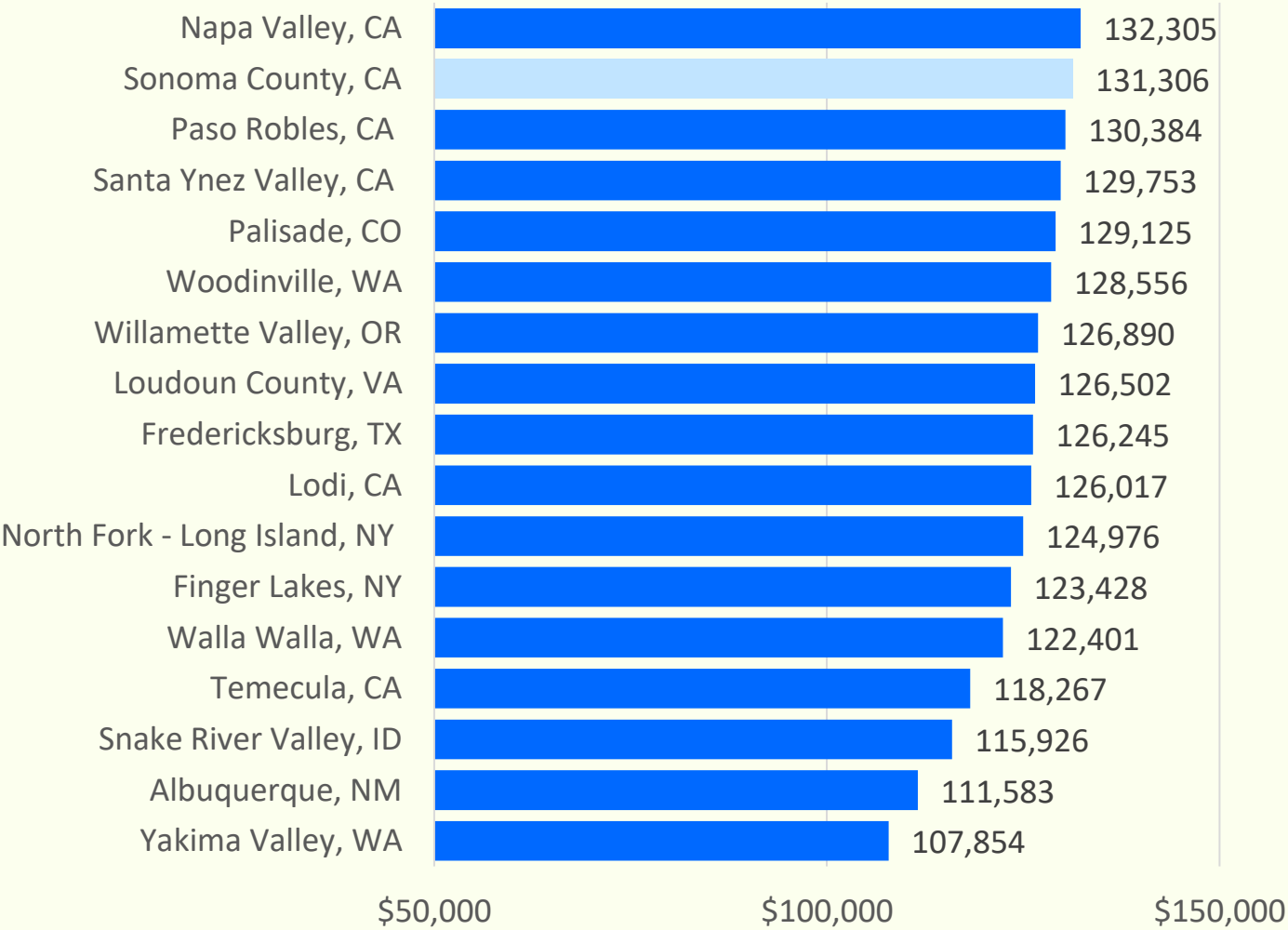
**73.4%**  
(National Average)

# Travelers to Sonoma and Napa have the highest annual household incomes among wine country regions.

**Question:**

Which best describes the combined annual income of all members of your household?

**\$95,044**  
(National Average)





# Key Takeaways

- **Compared to all travelers, wine county visitors are:**
  - ...on the younger side but more likely to be coupled-up.
  - ...well-represented by LGBTQI+ travelers.
  - ...more likely to have disability concerns in their travel parties.
  - ...more ethnically diverse than the norm.
- **Sonoma visitors differ from other wine regions in that they are:**
  - ...somewhat older than visitors to other wine regions.
  - ...relatively diverse ethnically and by orientation.
  - ...less likely to have disability concerns in their travel parties.
  - ...blessed with higher annual household incomes.

# Origin Markets by State

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

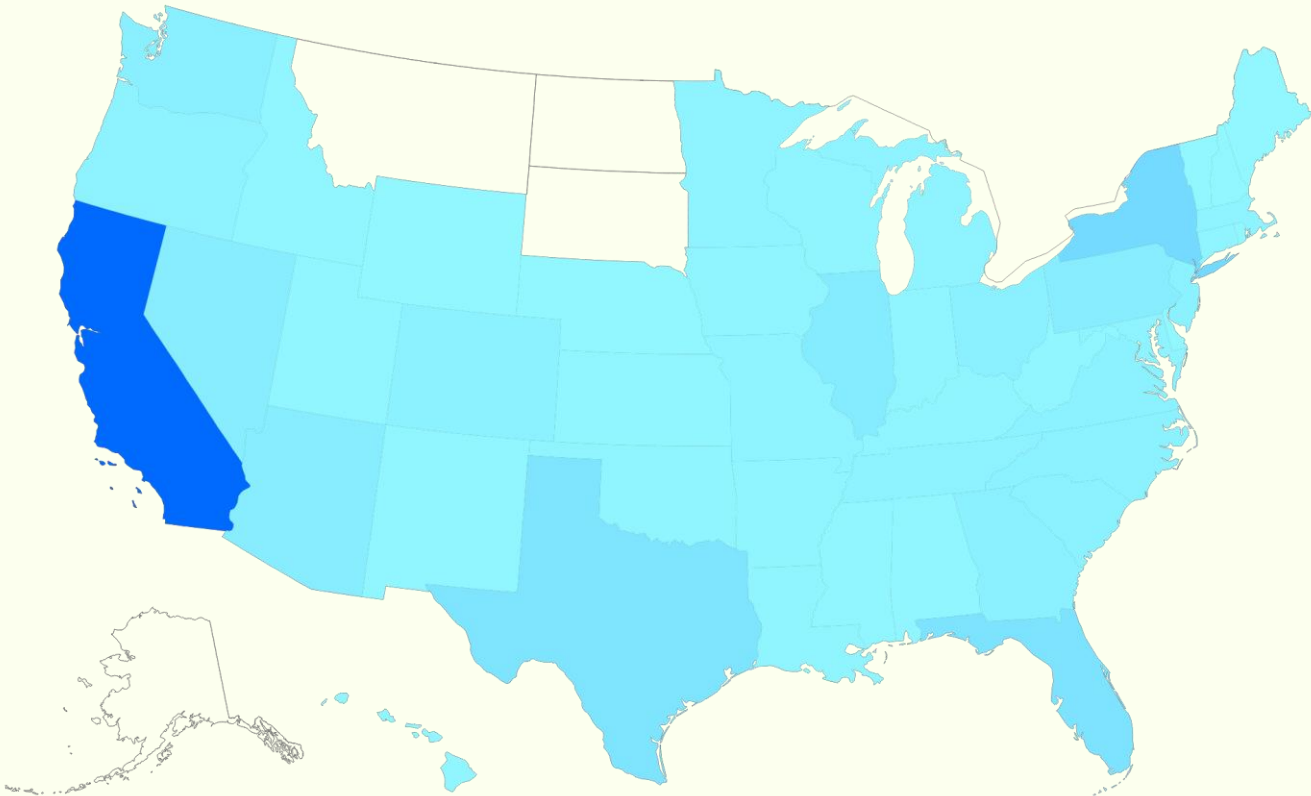
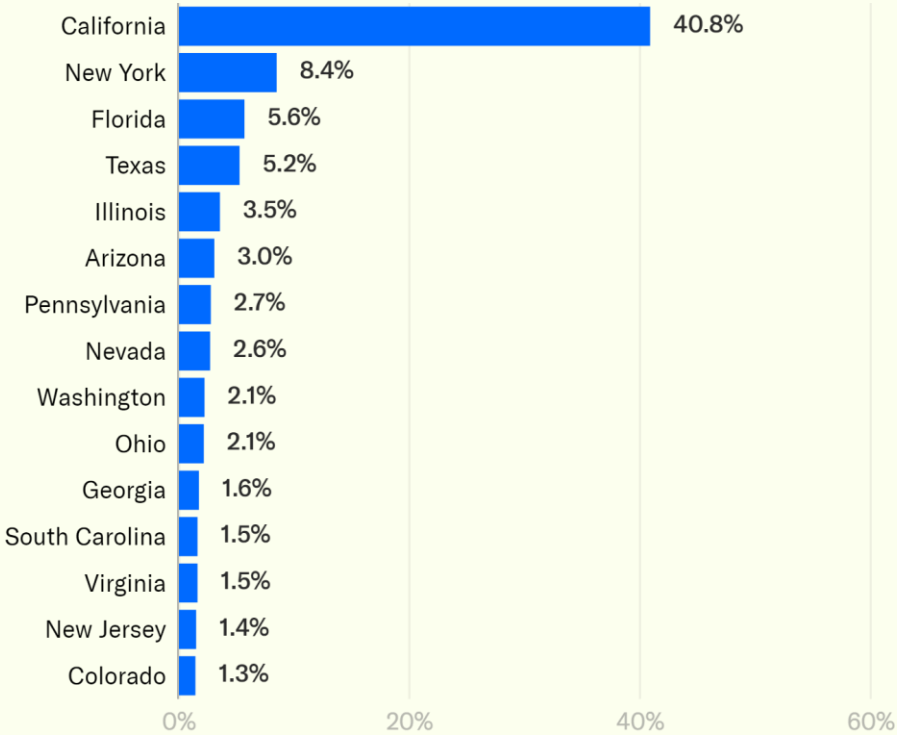
Filters

Sonoma County, CA

Total

Recent Visitors

Origin Market by State



Question: In which state do you currently live in?

# Origin Markets by Metro

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

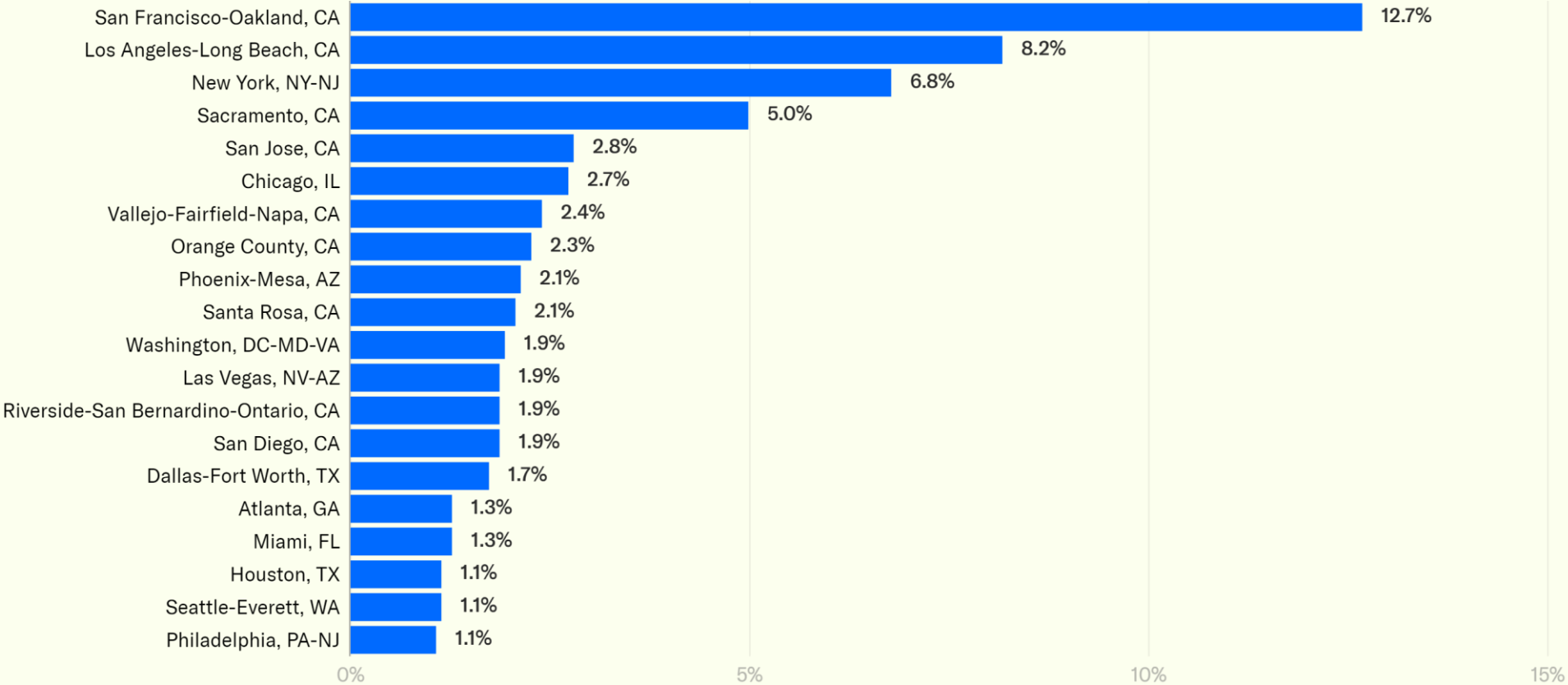
Filters

Sonoma County, CA

Total

Recent Visitors

Origin Market by Metro



Question: What is your 5-digit zip code?

# Household Income

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

Filters

Sonoma County, CA

Total

Recent Visitors



Question 1: Which best describes the combined annual income of all members of your household?  
Question 2: Do you live in a multi-income household? (i.e., more than one person contributing to the household income reported above)

# Question:

Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?





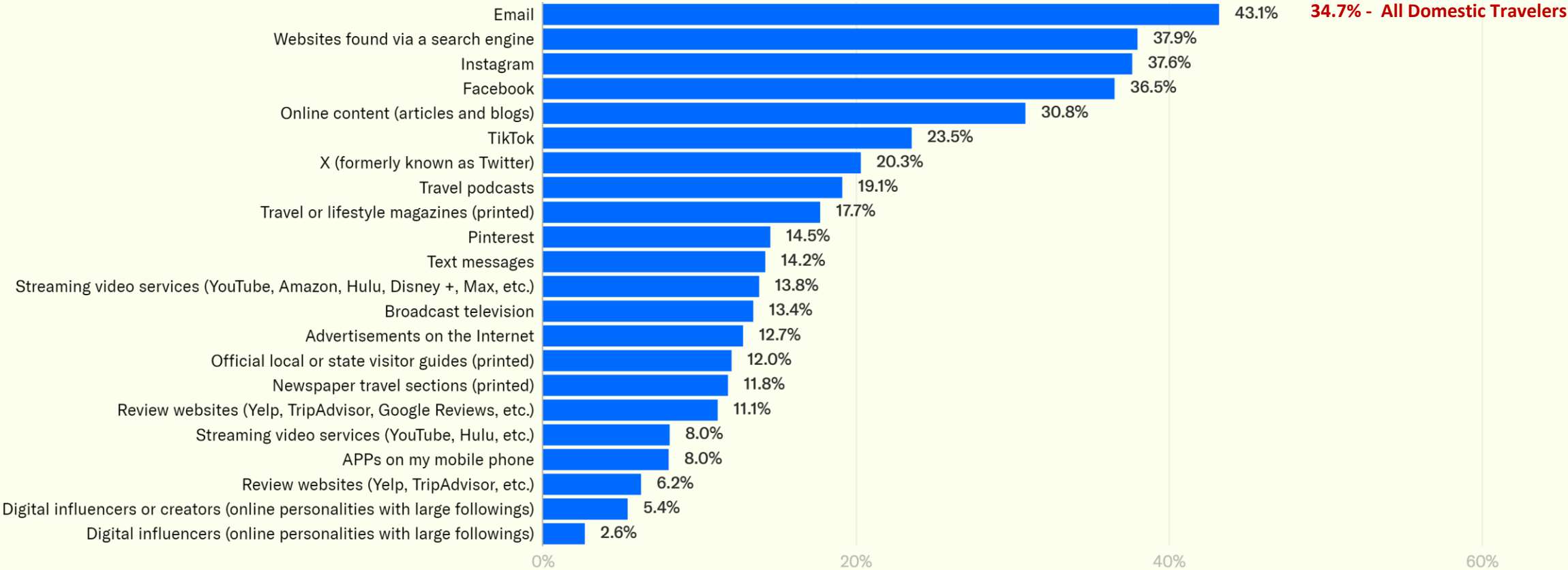
# Travel Inspiration Resources

Recent Visitors to Sonoma County, CA (Past 12 Months)



Year	Insights Explorer	Filters
2024	Wine Country Regions	Sonoma County, CA
		Total
		Recent Visitors

## Most Effective Travel Inspiration Resources



Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

# News Sources Used

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

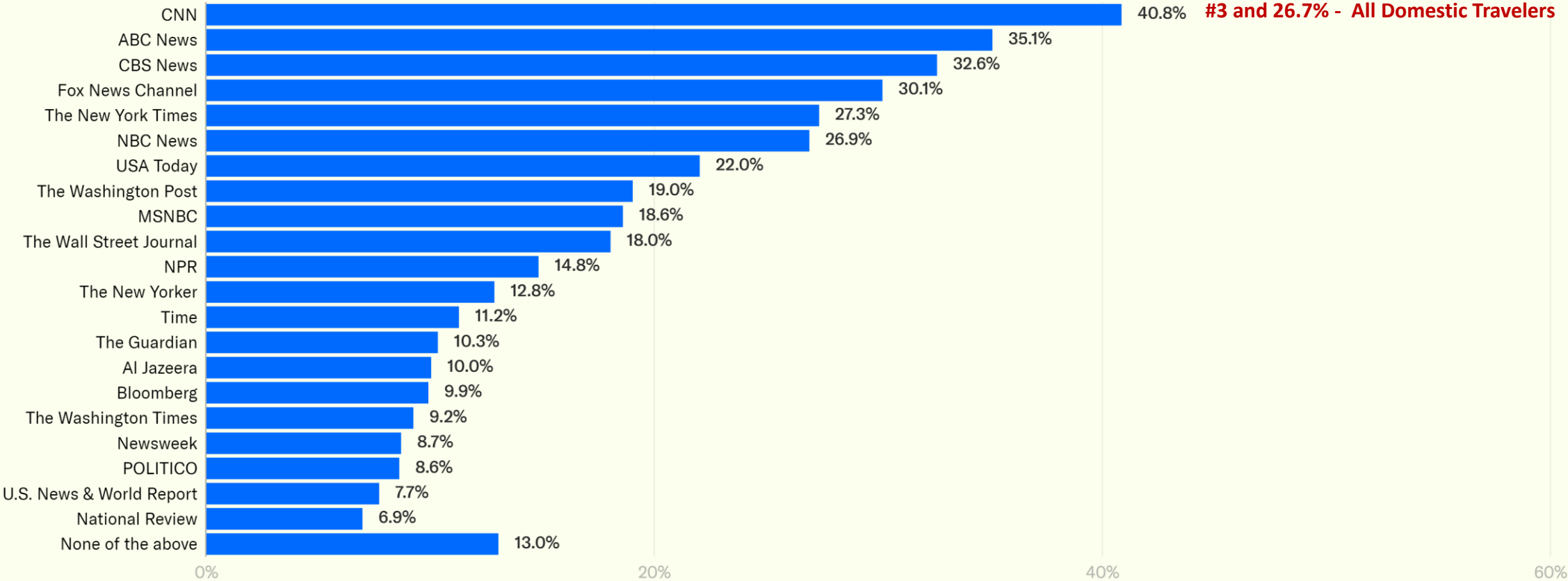
Filters

Sonoma County, CA

Total

Recent Visitors

Regularly Used News Sources



#3 and 26.7% - All Domestic Travelers

# Streaming Services Subscribed / Watched

Year

2024

Insights Explorer

Wine Country Regions

Filters

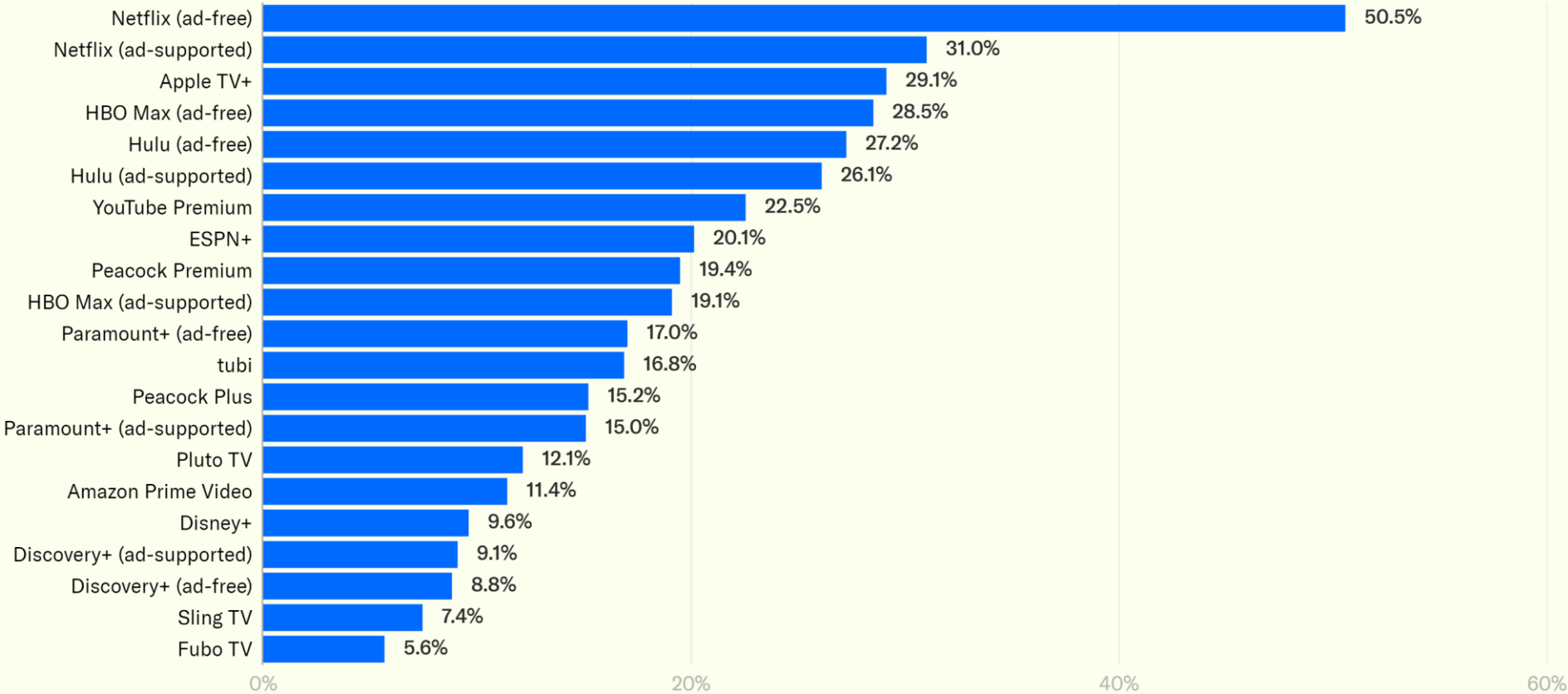
Sonoma County, CA

Total

Recent Visitors

Recent Visitors to Sonoma County, CA (Past 12 Months)

Regularly Watched Streaming Services



Question: To which of these streaming services do you currently subscribe or regularly watch? (Select all that apply)

# Top Travel Passions & Hobbies

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

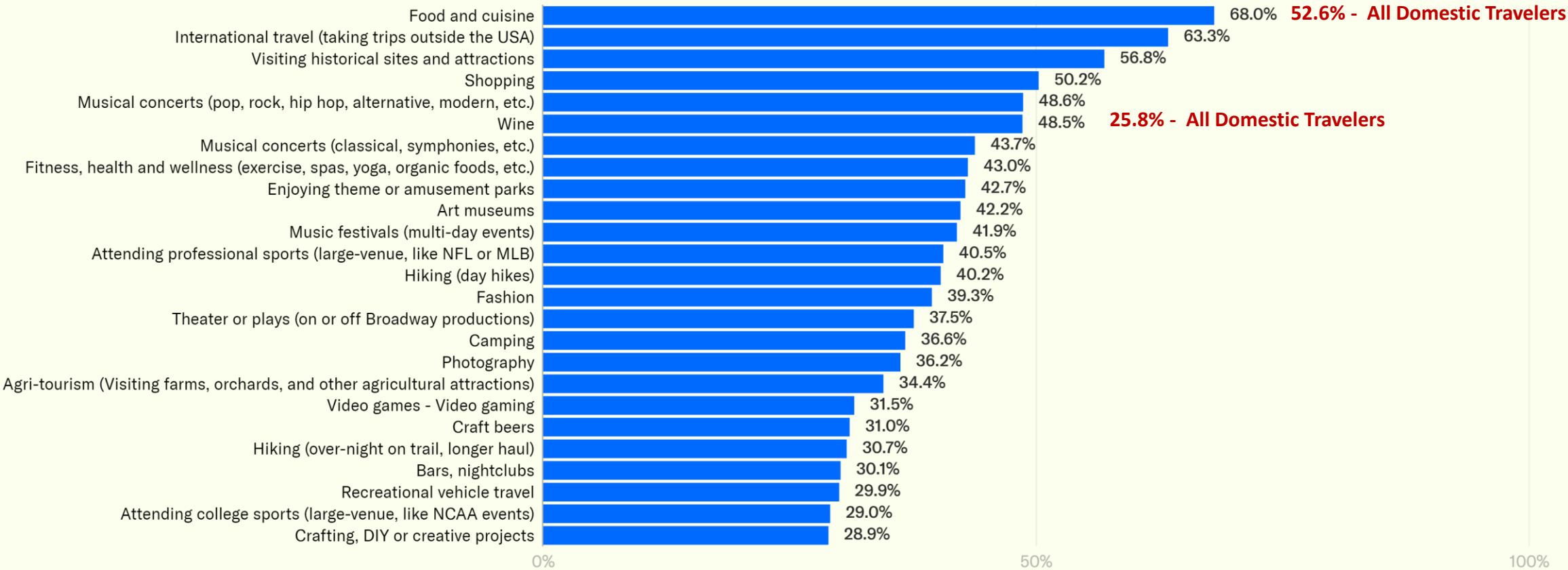
Filters

Sonoma County, CA

Total

Recent Visitors

Top Travel Passions & Hobbies  
(Top 2 Box - % selecting "Extremely high interest" or "High interest")



Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

# Social Media Platforms Used For Travel



Year

2024

Insights Explorer

Wine Country Regions

Filters

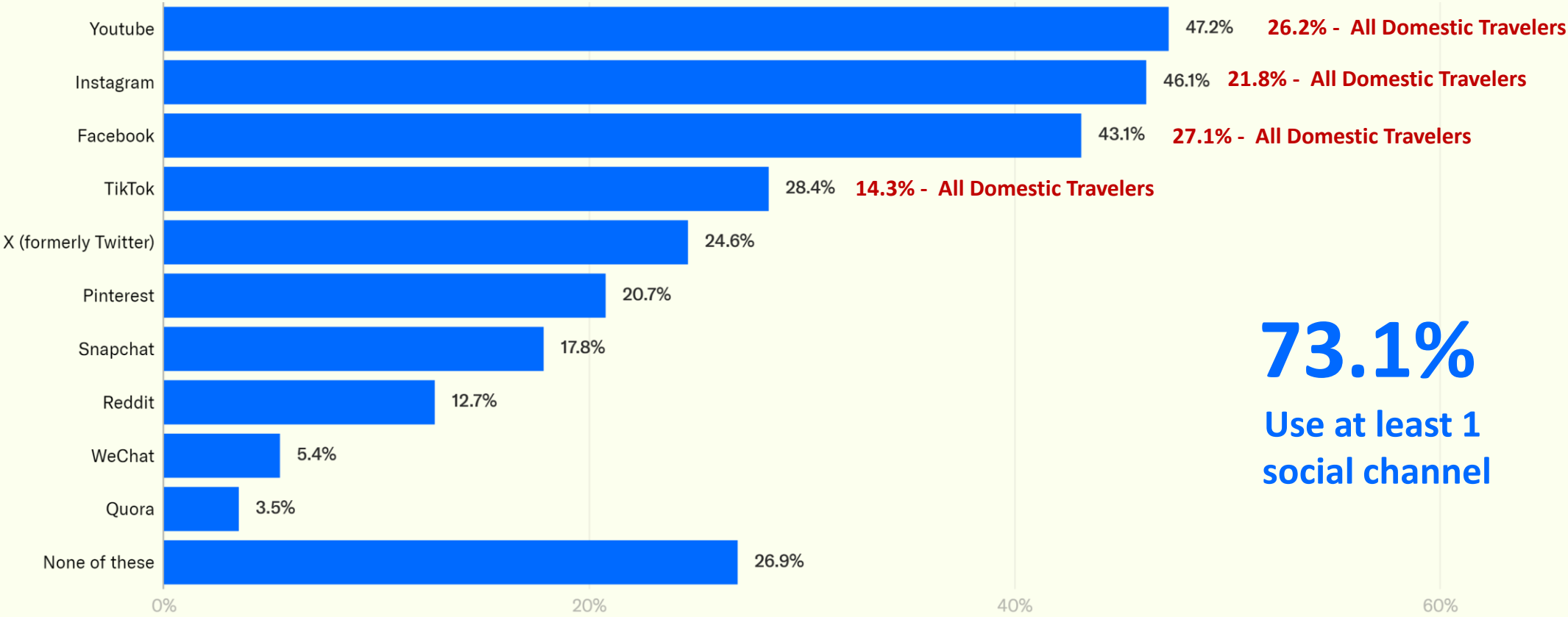
Sonoma County, CA

Total

Recent Visitors

Recent Visitors to Sonoma County, CA (Past 12 Months)

Social Media Platforms Used for Travel Planning in the Past 12 Months



Question: In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS? (Select all that apply)



# Official Tourism Office Resources Used

Year

2024

Insights Explorer

Wine Country Regions

Filters

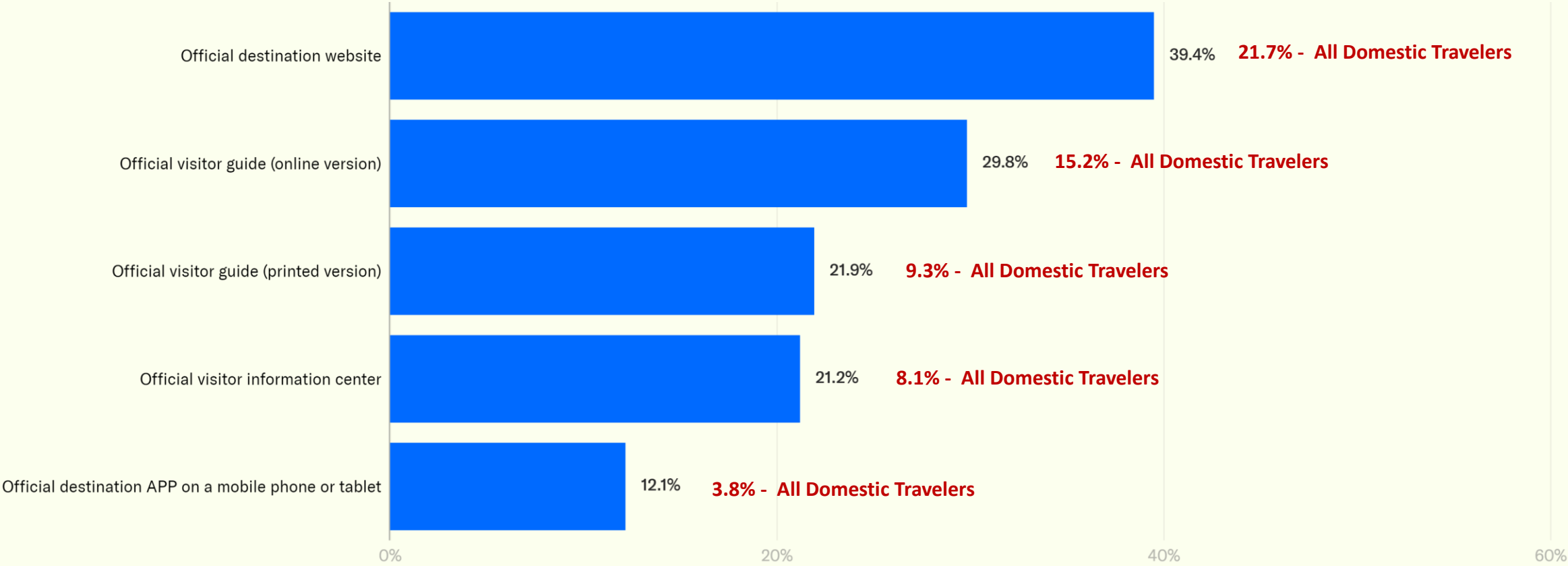
Sonoma County, CA

Total

Recent Visitors

Recent Visitors to Sonoma County, CA (Past 12 Months)

Official Tourism Resources Used to Plan Travel in the Past 12 Months



Question: In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel? If so, which resources did you use? (Select all that apply)

# Podcasts Used / Genres

Recent Visitors to Sonoma County, CA (Past 12 Months)

Year

2024

Insights Explorer

Wine Country Regions

Filters

Sonoma County, CA

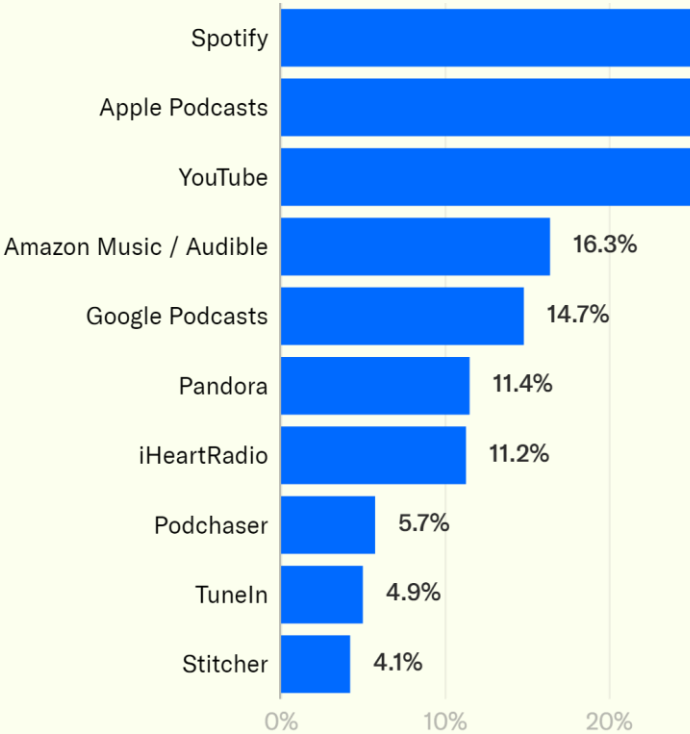
Total

Recent Visitors

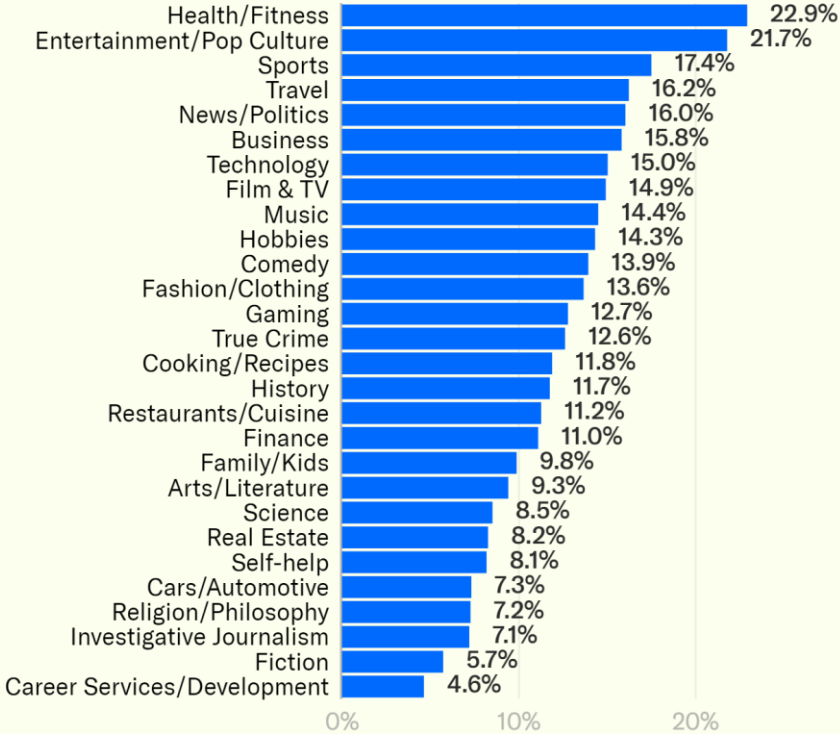
34.0% - All Domestic Travelers



Podcast Platforms



Podcast Genres



Question 1: Do you listen to any podcasts on a regular basis?

Question 2: What podcast platforms do you listen to on a regular basis? (Select all that apply)

Question 3: What podcast genres do you listen to on a regular basis? (Select all that apply)

# Key Takeaways

- **If you're not already good at social media and digital video promotion, get good. They're important now and will be key to the future.**
- **Continue to invest in your relationship with the Sonoma Valley Visitors Bureau.**
- **Effective email promotions are an important way to communicate with Sonoma Valley visitors.**
- **Consider getting your message out via podcasts.**

# Thank You