



USA

Sonoma County, California
Annual Report 2020



SONOMA SUSTAINABLE TOURISM OBSERVATORY

12-Apr-21

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Year 3 Annual Report 2020

What were our 2020 Plans and Goals?

In 2020 the Sonoma Observatory aimed to dive deeper into 2019's two areas of interest in the County – the impacts of rapid loss of ruralism in northern Sonoma County as it becomes a premier wine destination and how art spurs sustainable tourism.

COVID-19 shifted priorities

The tourism industry was massively impacted by COVID-19 travel restrictions across the US, California in particular. Sonoma County entered “quarantine” when a shelter-in-place order was issued by Gov. Gavin Newsom for California on March 19th, 2020, three days after seven Bay Area counties issued their own shelter-in-place orders.

On April 17th, five Bay Area counties (San Francisco, Marin, Alameda, San Mateo and Contra Costa) unveil orders for residents to wear masks. Sonoma County had issued a mask order several days earlier.

By May 7th, Solano, Napa, and Sonoma Counties begin to reopen, allowing some retailers, manufacturers, offices and parks can reopen the following day. The rest of the Bay Area continues to shelter-in-place.

In August, California adopted a four-tier, color coded classification system that would determine which counties can move forward with reopening businesses. Sonoma County has been classified as Purple Tier, which is classified as “Widespread” since then, keeping many businesses from reopening. This includes limiting wineries to outdoor only and keeping bars and breweries closed. As of February 2021, Sonoma County and the rest of the Bay Area are all still in the Purple Tier.

A special feature of this years' report will be how tourism & hospitality stakeholders have adapted to the changed travel climate and how the arts community lent a hand, providing innovative installations and productions to lure tourists from surrounding areas.

Many of the mandatory issue areas will start off with how COVID-19 has affected that particular dimension, where data are available.

Fires this year started early, in late August but a lightning storm, which was devastating to the grape harvest. Smoke taint affected nearly all of the grape harvest of 2020. The Press Democrat ran an article about grape losses, with some valuable numbers.

“The value of the North Coast's 2020 grape harvest plunged by almost half to \$940 million, primarily because of fruit damaged by wildfires and left on the vines, according to federal agriculture data released Wednesday.

It marked the second consecutive season the region's growers dealt with a shrinking crop worth less money, after the record 2018 harvest valued at \$2 billion for 588,889 tons of grapes.

Last year's crop was worth 47% less than the \$1.7 billion harvest in 2019, according to a preliminary California harvest report by the U.S. Department of Agriculture, and more significantly, growers in this four-county region, where they produce the most prized grapes in the United States, sustained the first drop in prices wineries paid for their fruit since the 2010 harvest.

The average price paid for a ton of grapes picked in Sonoma, Napa, Mendocino and Lake counties last year declined by 21% to \$2,765, from a record \$3,516 in 2019. Collectively, the region's growers lost a staggering \$833 million in revenue in 2020.

Meanwhile, North Coast growers harvested 340,150 tons of wine grapes, a 33% decline from 2019. Most of the decline was in red grape varieties typically picked later in the harvest. They were more prone to smoke damage."

[Value of North Coast's 2020 grape harvest cut in half by wildfires, pandemic \(pressdemocrat.com\)](https://www.pressdemocrat.com/story/news/2021/01/28/sonoma-napa-mendocino-lake-counties-grape-harvest-2020/7211110002/)

Moving forward

Our focus for 2021 is to look at how tourism is rebounding as the vaccine becomes available and is administered to the bulk of the population. We also intend to look closer at the wine industry, providing tourism is able to return in time for peak wine season.

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.

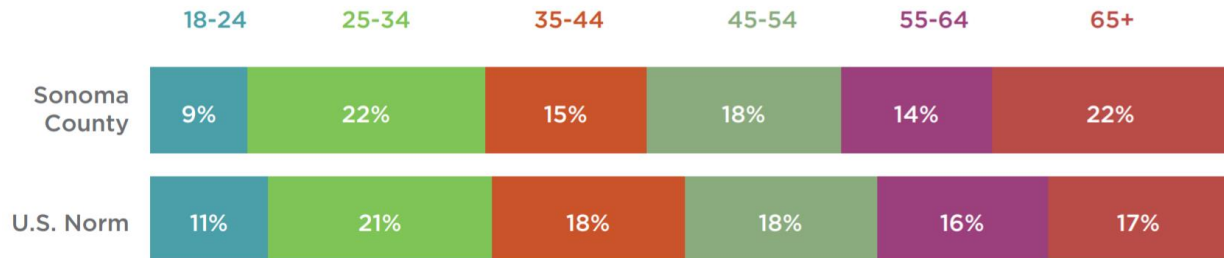
Data Collection

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. It sometimes can take a year for these agencies to collate and publish their data, so this year (2021) we will be primarily presenting 2019's visitor data. In places where 2020 data are available we will use them.

Visitor Breakdown in 2019:

In 2019, the Sonoma County Economic Development Board (EDB) partnered with Longwoods International¹ to analyze visitor demographics for their annual tourism report. The graphics in this section are from that analysis.

Age



Source: Longwoods International

Sonoma County’s travelers skew older, which likely reflects data from other wine regions. Retirement age visitors are the most common, along with 25-34 year-olds who have grown out of their party phase but may not yet have children.

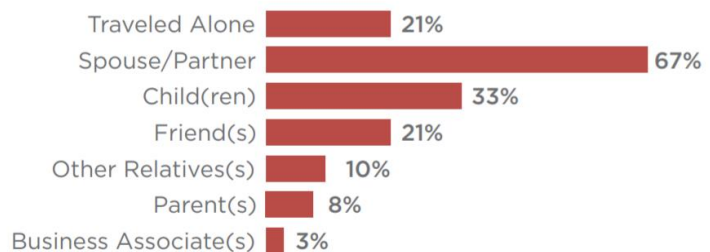
The most common group size was two people, most likely couples on wine tours, honeymoons, and romantic getaways. Families with children were the second-most common.



3.0 People

Size of the average travel party visiting Sonoma County

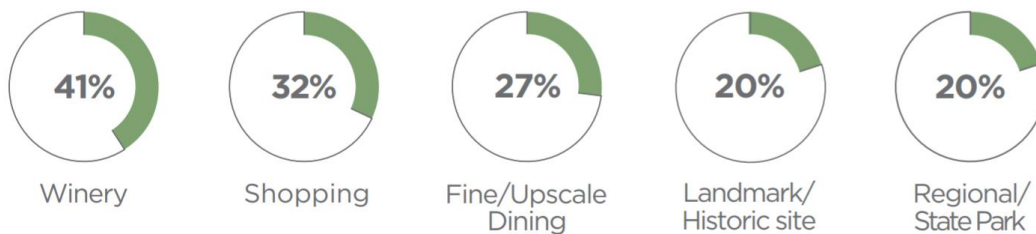
Composition of Immediate Travel Party



Source: Longwoods International

Wine, shopping, and dining were the most common activities for visitors.

Top Activities



Source: Longwoods International

¹ <https://www.northbaybusinessjournal.com/article/industrynews/sonoma-county-tourism-tackles-impact-of-covid-19-future-plans-at-annual-me/>

Issue Areas

1 Employment

Coronavirus effects

2020 Sonoma County Annual Tourism Report - Moody's Analytics Tourism Analysis:

"Unemployment is expected to decline over the next two to three months but settle at a high rate around 10%, notably the peak unemployment rate during the financial crisis. By the end of the year, Moody's predicts that half of lost jobs will be recovered. The economy will slump again later in the year if there is no additional stimulus package from the Federal government even without an increase in virus cases.

A full recovery will not occur until a vaccine becomes widely accessible, which, though accelerating, is not projected to be fully and widely distributed until mid-summer or the latter half of 2021. Losses in income will lead to a lower demand for discretionary services and goods. State and local governments will also suffer losses as their tax base takes a hit and levels of employment may not rebound until 2023. Most companies will have to rethink their business models since covid restrictions are expected to be in place for some time."

2 Destination economic benefits

Coronavirus effects

2020 Sonoma County Annual Tourism Report 2020 Sonoma County Annual Tourism Report Moody's Analytics Tourism Analysis:

"Sonoma County's tourism industry has taken a steep hit in 2020 with outdoor recreation businesses faring slightly better. Transient occupancy rates are slowly ticking up to 40%, but occupancy rates are still 40% below their year-ago levels.

The COVID-19 pandemic dealt an immense blow to the tourism industry and the recovery process will take some time. Closure of non-essential businesses in March led to a drastic drop in occupancy rates. In mid-April, occupancy rates reached their nadir at under 25%. In recent weeks, there has been a slow uptick to 40% by the end of May, but occupancy rates are still at historic lows.

As shelter in place orders begin to end across the U.S., businesses are beginning to reopen and local economies are restarting. In mid-April, around 2,600 counties were halted, which accounts for around 30% of the nation's GDP. As of the first week of June, employment activity from the Google mobility data remained down 30% from precovid level compared to 50% down in mid-April. Activity at restaurants, retail stores, amusement parks, and other recreational activities was down 50%, and now it is only down 20%.

Businesses will be dealing with lower sales and increased costs due to various social distancing measures they must comply with. Households will also keep their spending lower than usual because of uncertainty about the future."

2019:

According to the Dean Runyan Sonoma County 2019 economic impact report, visitor spending rose 1.4%, a decrease over the 4.4% realized in 2018. This is likely due to two natural disasters during the year: the flooding that occurred during the Spring and the Kincade Fire that occurred in the fall.

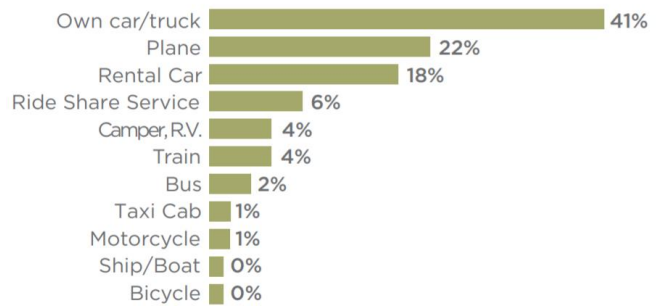
Arrivals at Charles M. Schulz-Sonoma County Airport rose to a new record in 2019 due to expanded access to hubs in the West such as daily flights to Denver.

DESTINATION SPENDING Destination spending is the total amount spent by visitors in Sonoma County. This indicator includes all spending on accommodations, wine activities, retail, and other tourism-related purchases. The most recent figures show that Sonoma County’s destination spending increased by 1.48% from \$2.02 billion in 2018 to \$2.05 billion in 2019. Destination Spending per Capita For each of Sonoma County’s 492,485 residents, \$4,542 in destination spending was generated. Napa County generated the highest per-capita spending at \$13,515 due to its relatively small population. Monterey followed at \$7,559 and El Dorado at \$5,814.

The Transient Occupancy Tax reports are produced by the Economic Development Board in conjunction with Sonoma County Tourism. This quarter’s report was prepared by Tourism Research Project Coordinator, Peyton Sales².

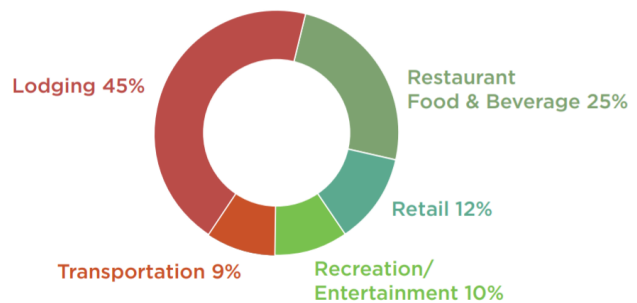


Top Methods of Transportation



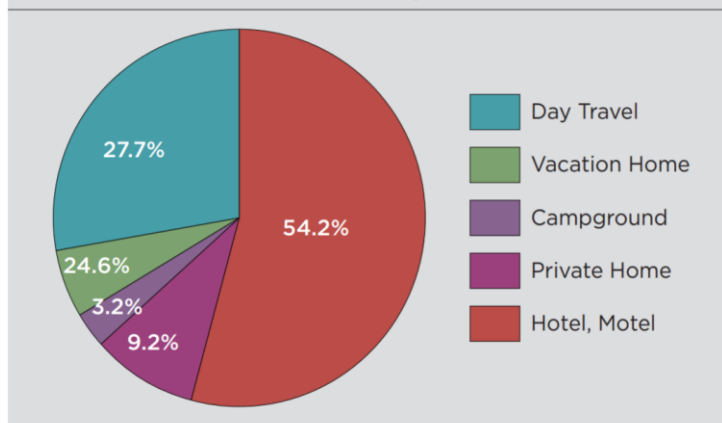
Source: Longwoods International

Domestic Overnight Expenditures by Sector



Source: Longwoods International

Distribution of Visitor Spending by Accommodation
Sonoma County, 2019



Source: California Travel Impacts by County, 2019
(www.visitcalifornia.com/research/economic-impact/)

² <http://sonomaedb.org/WorkArea/DownloadAsset.aspx?id=2147579894>; <http://sonomaedb.org/Data-Center/Industry/>

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.

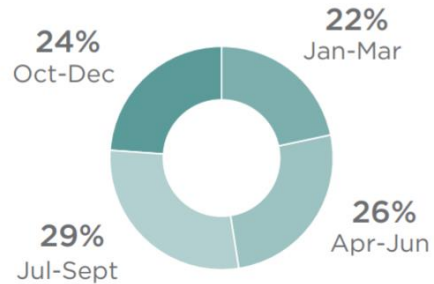


3 Tourism seasonality

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

See graphic from the Sonoma County Economic Development Board (EDB)’s Annual Tourism Report for a breakdown of 2019’s tourism visitors by quarter. We note that numbers in 4th quarter 2019 are down, likely due to the Kincade Fire, which started in late October.

Season of Trip



Source: Longwoods International

Due to Coronavirus, tourism is down across the board to varying degrees³.

	US	CA	SF Bay Area
Occupancy for week ending Feb. 6 compared to the same week a year ago	Down 30.5%	Down 38.2%	Down 50.9%
Average Daily Rate (ADR) from the same week a year ago	Down 29.0%	Down 35.6%	Down 50.9%

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.

The Sonoma County Tourism Bureau is not government-run; rather it is a private, non-profit marketing and sales organization dedicated to promoting overnight stays and creating a sustainable hospitality economy in the county.

In California, Climate Change is considered to be a threat to our economy and our way of life. The states 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.

³ <https://industry.visitcalifornia.com/research/report/weekly-california-lodging-report>

5 Carbon Emissions (New Mandatory Issue Area)

A significant development led in part by California’s Jackson Family Wines is the emerging consensus that winemakers globally must change their business practices not only to survive the effects of the climate crises but to actively join in the fight against it. Working together with Miguel Torres, of Familia Torres, Vice President of Sustainability Katie Jackson cofounded the International Wineries for Climate Action (IWCA), which seeks to build a coalition of environmentally committed wineries worldwide. Members who wish to join are asked to commit to “overall reduction in greenhouse gas emissions (GHGs) of 80% by 2045, with a shorter-term target of 50% by 2030.”

CLIMATE PROGRESS IN LATEST SONOMA COUNTY DATA, BUT MORE NEEDED BY 2030

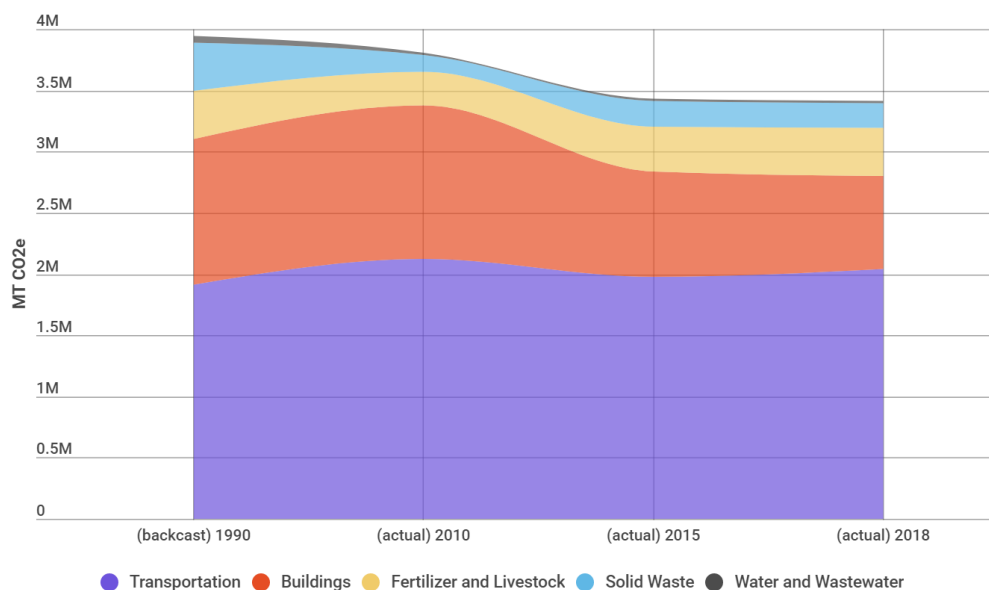
Posted By July 13, 2020 | Perspective

Opportunities in cleaner transportation, building energy and carbon farming

The latest Greenhouse Gas (GHG) Inventory for Sonoma County shows that community based annual emissions in 2018 were 13% below 1990 levels, with more progress needed to meet Sonoma County’s 2020 goal of 25% below 1990 levels. The new report from the Sonoma County Regional Climate Protection Authority (RCPA) uses the most recently available data showing that Sonoma County emitted 3.41 million metric tons of CO₂ equivalent (MT CO₂e) in 2018. This was slightly lower than the 2015 emissions of 3.44 MT CO₂e measured in the previous inventory.

The RCPA is committed to measuring, tracking, and reporting Sonoma County GHG emissions to communicate progress and focus our actions. In order to meet Sonoma County’s 2020 goals for GHG reductions, the county will need to reduce another 0.5 MT CO₂e. Even steeper reductions will be needed by 2030, in line with the scientific imperative, to avoid the catastrophic impacts of unchecked climate change.

1990-2018 Sonoma County Emission Trends



Sonoma County Supervisor and RCPA Chair Susan Gorin said, “It is clear that we are moving the needle in the right direction, and we can do more by building off of the clean power, open spaces and resilient communities we have been investing in for years.”

Transportation continues to be the largest source of emissions for the county, with 60% of total countywide emissions in 2018. Between 2015 and 2018, vehicle miles traveled by residents and workers within the county increased by almost 10%. Emissions during this same time increased by only 3% due to improvements in fuel efficiency, such as a shift to hybrid and electric vehicles.

While 2018 may have been an all-time high for vehicle miles travelled, 2020 could turn out to be much different. Vehicle miles travelled were down nearly 75% in April 2020, during shelter in place orders, and were still down 42% on average through the month of June.

Emissions from energy used in buildings decreased 12% between 2015 and 2018, or 37% between 1990 and 2018. This reduction is largely attributed to Sonoma Clean Power, which was created in 2014 to provide cleaner electricity. As our electricity supply has grown cleaner, emissions from natural gas have become the next opportunity to decarbonize; such as upgrading space heating, water heating, and cooking.

Livestock and fertilizer emissions are the third largest source of emissions in Sonoma County, with increased emissions in 2018 due to livestock population growth. These working lands can and are part of the solution by using carbon farming techniques to sequester carbon in the soil.

Emissions from waste sent to landfills decreased 7% between 2015 and 2018 due to increased recycling and composting. While the total tons of waste disposed increased significantly in 2018 due to debris from the 2017 wildfires, the resulting debris was largely ash with minimal gases left to escape.

Countywide emissions from water and wastewater decreased by 4% from 2015 to 2018. Starting in 2015, Sonoma Water has contracted 100% of its electricity needs for moving water and processing wastewater through renewable and carbon free resources.

From: The Sonoma County Regional Climate Protection Authority (RCPA); 411 King Street, Santa Rosa, CA 95404; <http://rcpa.ca.gov>

Petaluma: Carbon Neutral 2030



Tiny Petaluma has agreed to a comprehensive plan to become carbon neutral by 2030 with this mission statement: “Acting decisively by joining and inspiring others across the world to initiate a massive local economic impulse and model 21st century green architecture, landscape design, and

engineering to restore ecological balance and economic stability. *To this end, we aim to achieve greenhouse gas carbon neutrality for the City of Petaluma by 2030.*”

A recent study by the Sonoma County Regional Climate Protection Authority found the transportation sector is responsible for 60% of greenhouse gas emissions within its borders. The neighboring communities of Santa Rosa and Sebastopol are also considering banning the construction of new gas stations in their communities.

The mayor has been inundated by inquiries locally, nationally, and from other countries. “It’s really taken me, and most of us, by surprise. I just thought, wow, I had no idea it would go international. By the time I disconnected from one Zoom interview yesterday I had an email from someone in Ireland. Then one of my neighbors told me their in-laws in England saw a story about us — our little town of Petaluma.”

Predictably, those who make their living by selling gasoline are not pleased by the ban. In a statement this week, the California Fuels & Convenience Alliance called efforts like the one in Petaluma part of “an alarming trend.” It said, “Various localities throughout the state have started down a misguided direction, banning new gas stations within city and county limits, through ordinance or moratorium. This single-minded approach will ultimately cause greater harm for communities than any potential benefit.”

Maybe, but as for the people of Petaluma, the ban is not particularly controversial. Mayor Barret says the only “hate mail” she has gotten is from people in other parts of California and in other states. She says, “This is not a hard-fought, contentious decision. These are, by and large, unanimous decisions that are bringing us forward. We are just responding to our community.”

The CEO of Volvo says he doubts anyone will want to buy a gasoline powered car by 2030. Stodgy GM aims for all of its cars will be electric by 2035. Gas stations may one day go the way of Pony Express offices. Changes are coming to the world of transportation and the pace of change is accelerating. First Petaluma, then Peoria, then Pittsburgh? Hey, it could happen — and probably will.

By: Steve Hanley | Published: March 7, 2021 | CleanTechnica

6 Accessibility (New Mandatory Issue Area)

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.

7 Local satisfaction with tourism

Usually, we conduct a survey at the Sustainable Enterprise Conference and at other community meetings, but this past year, all in-person events were cancelled. Instead, we reached out to stakeholders at the beginning of 2021 to get thoughts on the re-opening of tourism in Wine Country.



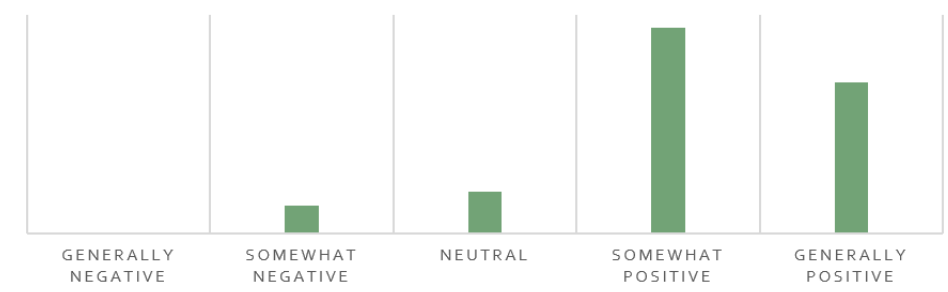
Some particularly strong responses to this question were:

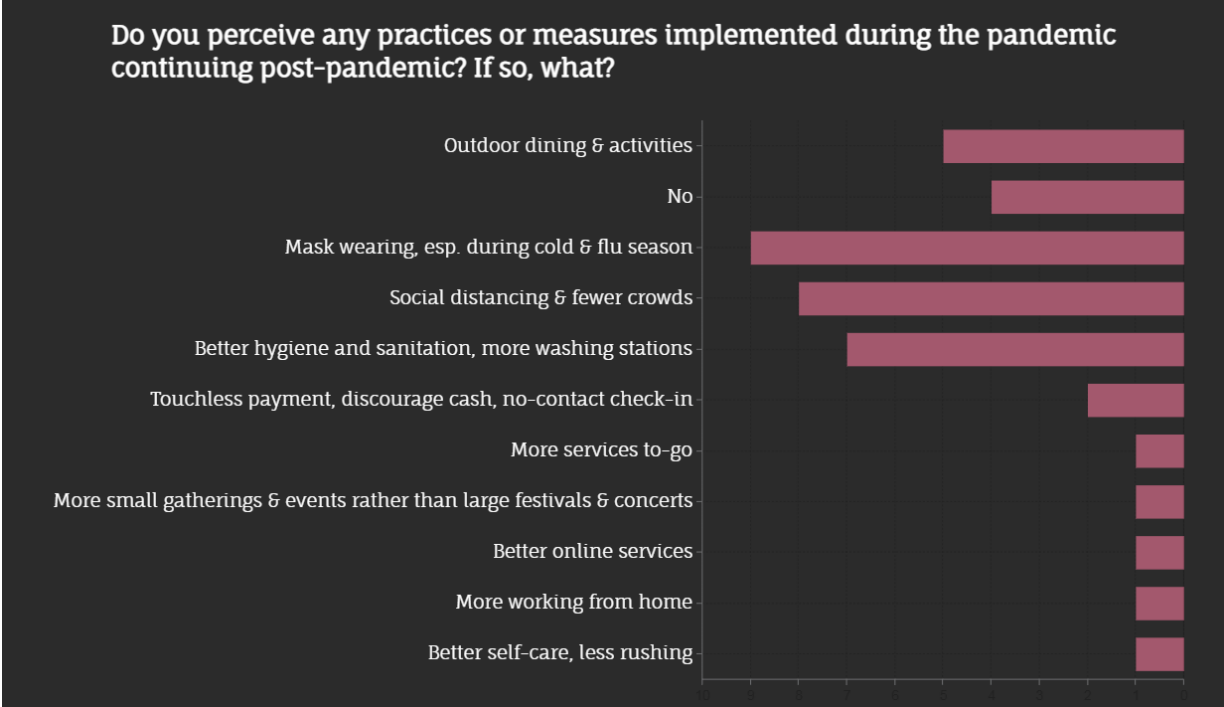
“Street dining made permanent. We can sacrifice a few parking spaces to integrate social spaces in this vibrant way. I suggest we have full-fledged architectural/design competitions to develop the best and most beautiful solutions for outdoor dining. Designed correctly, these spaces could be usable 9 months of the year or more - maybe year round.”

“Cleaner & better maintained roadways, incentives for locals to participate in tourism. Better amenities at outdoor spots like hiking trails and beaches - full washing stations w/ soap for instance. More outdoor markets.”

“More outdoor dining. We've already adapted to that. I don't think it would be a bad idea to continue on with measures intended to reduced the spread of possible variants. Exceptional attention to cleanliness and to overcrowding.”

DO YOU HAVE A GENERALLY POSITIVE VIEW OF TOURISM OR A GENERALLY NEGATIVE VIEW OF TOURISM IN THE COUNTY?





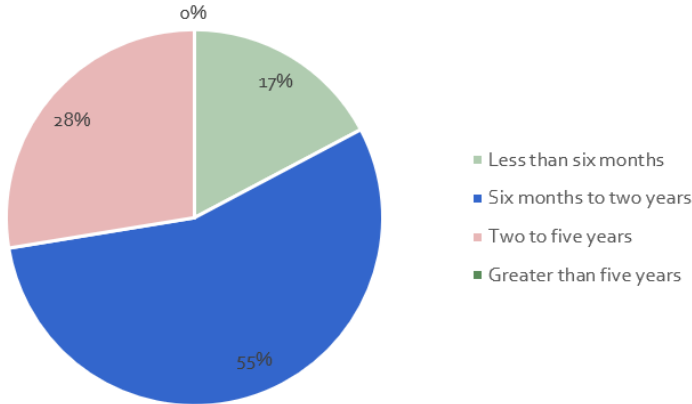
Many of the responses to this question were focused on continued outdoor dining and activity, and on better hygiene and cleanliness:

“Yes, more outdoor activities. I think most of the measures implemented should be kept in place for a long time to come. Not mask wearing per se but hygiene and strict regulations on cleanliness.”

“Outdoor seating for sure, better sanitary measures, and I'd like to see mask wearing during flu season. Not compulsory or anything, just if you feel like you might be sick, wear a mask. I know you have masks.”

“Small gathering group events over larger, more crowded festivals or concerts. Larger events will be more mindful of sanitation stations (for handwashing) and will discourage cash transactions with prepaid card incentives or other touchless payment methods.”

Once the pandemic has subsided & tourism can return to normal, how long do you think it will take for the industry in Sonoma to recover?



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



Some particularly thoughtful responses to this question were:

"I want to share the beauty and hospitality of Sonoma County with visitors, and at the same time I recognize that we have a climate crisis that requires us to reduce vehicle miles traveled at a rate of about 1% per year between now and 2050. Simply getting everyone into an electric car doesn't solve the greenhouse gas emissions problem.

We need to use our imaginations to provide mobility while reducing the number of cars on the road. Some visitors will recognize that their own safety is protected by riding in a limousine with a chauffeur, and some will even be happy to bicycle, especially if there are safe trails. Others will need a nudge to ride SMART or a tour bus. Over time, it may be necessary to reduce the number of parking spaces, and charge for parking."

"Hopefully tourism will be back to previous levels soon. I don't think Sonoma will recess. I think our tourist attractions are for the most part outdoors, which is going to be a huge plus, think state parks and beaches. As far as wineries or the restaurant industry I think outdoor dining will be a major factor for a long time to come. During the pandemic we adapted to eating outdoors in all types of weather."

"More and better-advertised winery region tours - there are hundreds to choose from and it can be VERY confusing on where to go. Plus, no transport options to speak of!"

"I don't like that new ground is being broken on building projects rather than focusing on the ample in-fill opportunities. I'd like for more dedicated cycle paths, parallel but separated from main roads, especially in west sonoma/marin."

"It's a beautiful area. The first wave of tourists after the pandemic will most likely be locals within the greater Bay Area. Day travel spots and weekend getaway venues may be in luck!"

Our takeaways from this survey were that outdoor dining is quite popular, traffic continues to be an issue, and that tourism should return to normal slowly and safely, rather than rush to get back up to previous numbers.

8 Energy management

US energy is privately managed, in Sonoma County, by Pacific Gas & Electric (PG&E). Public energy management has been discussed after multiple failures and fires started by the aging PG&E power grid, which has not been well maintained. Currently, focus has shifted to Coronavirus and vaccination efforts but we expect fire season this year to bring it back into focus.

9 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: <https://www.sonomawater.org/water-supply>

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.

10 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 medians⁴.

11 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.

12 Cost of Living

We chose to include this metric which we believe best illuminates the economic ecosystem in Sonoma County, and it relates directly to the Sustainable Development Goals. Specifically, the following SDGs: 1 No Poverty, 3 Good Health and Well-being, 7 Affordable and Clean Energy, 8 Decent Work and Economic Growth.

As of January 1, 2021, the minimum wage in California is \$13.00 for employers with 25 or fewer employees, or \$14.00 for employers with 26 or more employees⁵, but various cities within Sonoma

⁴ <https://srcity.org/1061/Recycled-Water>

⁵ See [California Department of Industrial Relations, Minimum Wage](#).

have different minimum wages:

City or County	2021 Minimum Wage	2021 Minimum Wage for Small Businesses
California	\$14	\$13
Petaluma	\$15.20	\$15
Santa Rosa	\$15.20	\$15.20
Sonoma	\$15	\$14

— Patch editor Michael Wittner wrote this report, with additional reporting by editor Courtney Teague; From <https://patch.com/california/petaluma/petaluma-increasing-minimum-wage-2021>

The living wage in Sonoma County is \$15.39 for one adult, double that for one adult with one child⁶.

	1 ADULT		2 ADULTS (1 WORKING)		2 ADULTS (BOTH WORKING)	
	0 Children	1 Child	0 Children	1 Child	0 Children	1 Child
Living Wage	\$19.51	\$42.70	\$31.87	\$39.00	\$15.94	\$22.94

From: <https://livingwage.mit.edu/counties/06097>

Just in!:

As we were wrapping this report up to send out, new stats were released by The Press Democrat which we would be remiss to leave out.

“According to the state Employment Development Department, half the 24,600 people employed at local hotels, restaurants and bars before the pandemic in January 2020 had lost their jobs a year later. According to data from Visit California, an industry-funded nonprofit, in 2020 tourism revenue dropped to a projected \$66 billion, a 55% decrease from 2019.

‘Fires, floods, fires, and now a pandemic,’ said Sonoma County Supervisor James Gore. ‘We really have seen it all.’”

To read the full article, visit: <https://www.pressdemocrat.com/article/news/sonoma-county-tourism-industry-cautiously-optimistic-about-life-after-pande/>

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

⁶ <https://livingwage.mit.edu/counties/06097>