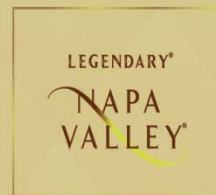


Tourism in Napa County

March 10, 2015





Destination Analysts 2012 Napa Valley Economic Impact Study

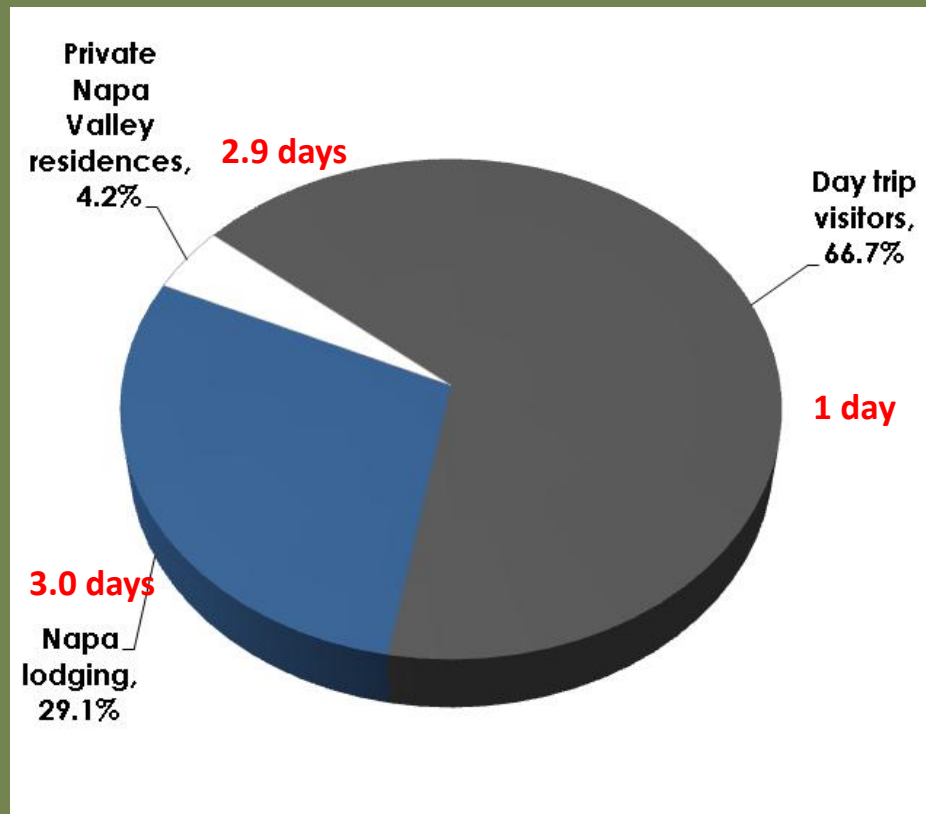
Summary Results from a study prepared for Visit Napa Valley by Destination Analysts, Inc.



VISITOR VOLUME, 2012 (In Millions)

Visitors to Napa (thousands)

Napa lodging	857
Private Napa residences	125
Day trip visitors	1,962
Total	2,944



2.94 million visitors

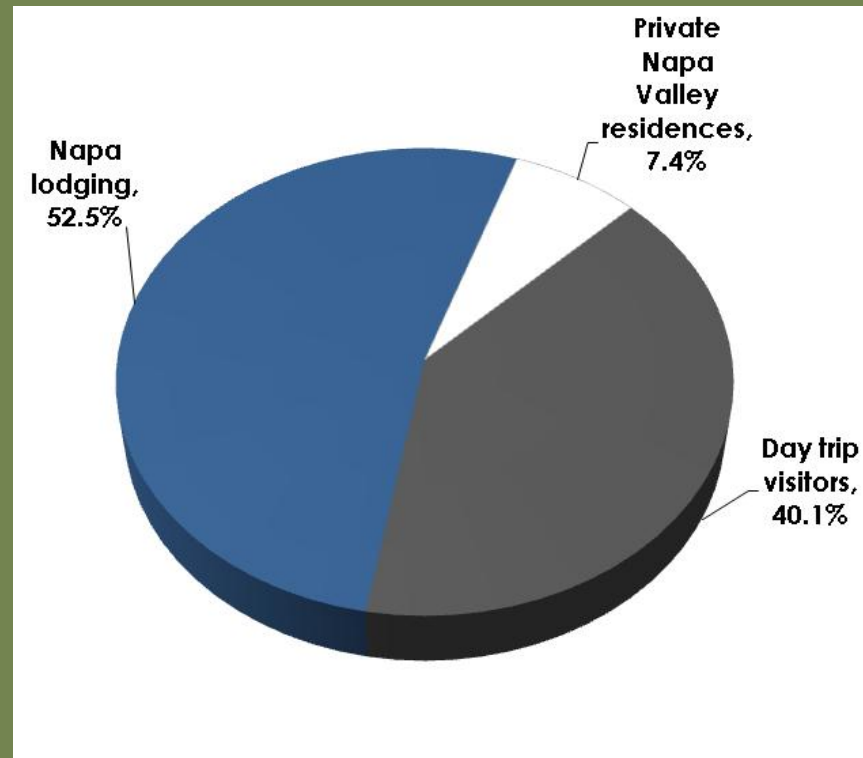


VISITOR DAYS IN NAPA VALLEY, 2012

(In Millions)

Visitor Days Spent in Napa (thousands)

Napa lodging	2,571
Private Napa residences	361
Day trip visitors	1,962
Total	4,894



4.89 million visitor days

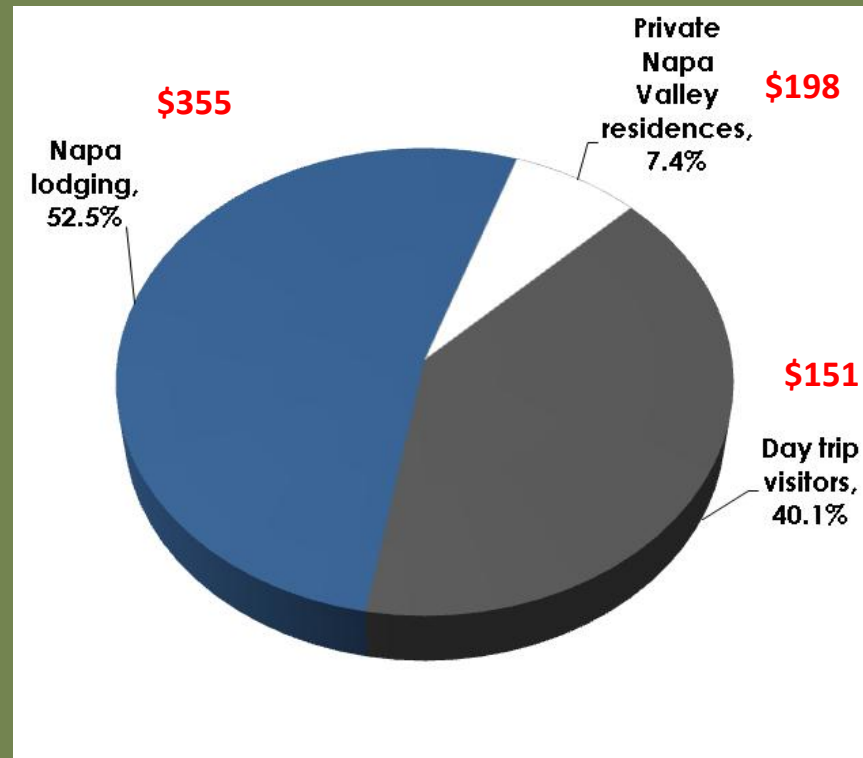


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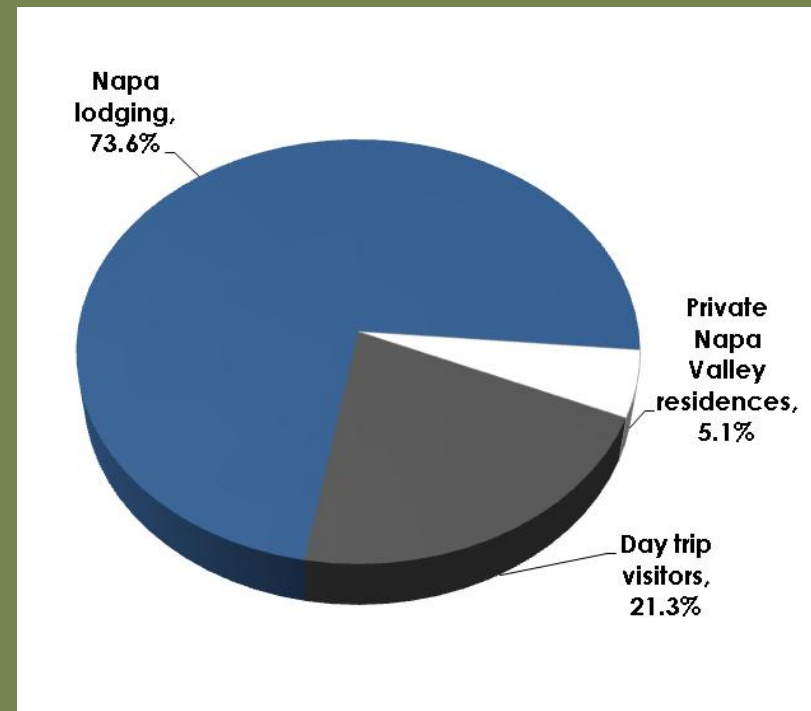
4.89 million visitor days

DIRECT VISITOR SPENDING BY TYPE, 2012

(In Thousands)

Direct Visitor Spending in Napa (thousands)

Napa lodging	\$1,026,264
Private Napa residences	\$70,857
Day trip visitors	\$297,063
Total	\$1,394,185



\$1.39 billion

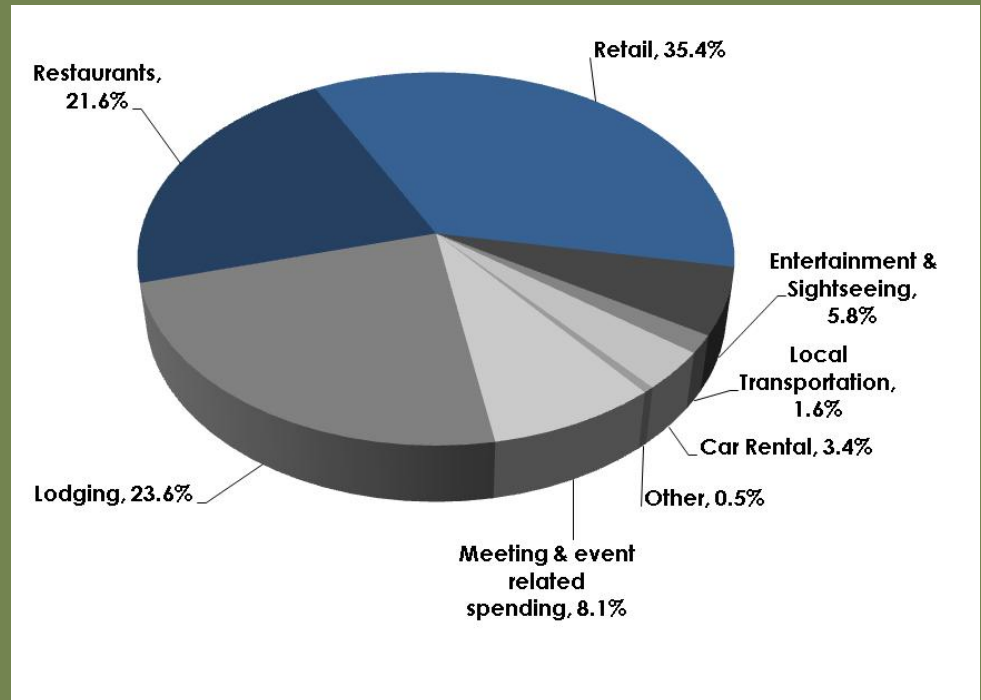


DIRECT VISITOR SPENDING, 2012

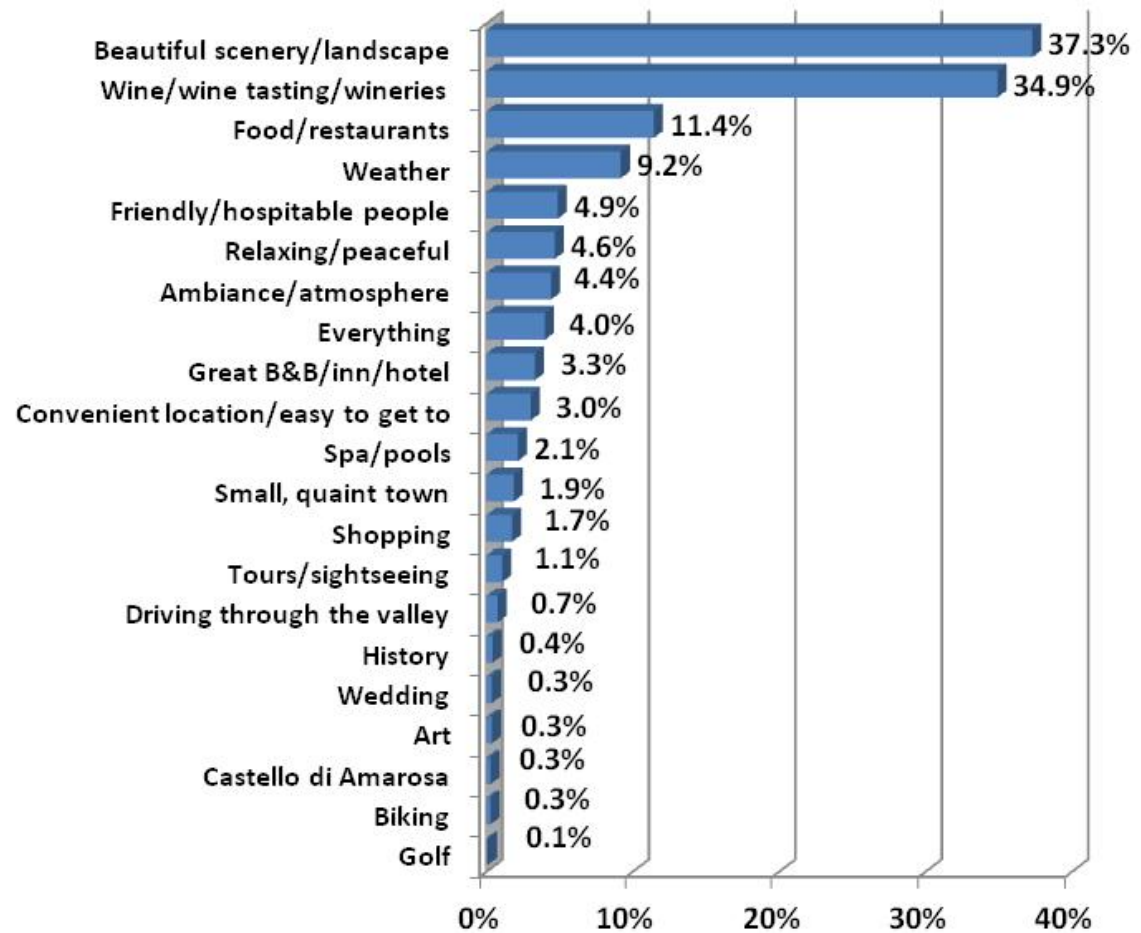
(In Thousands)

SPENDING CATEGORIES

Lodging	\$328,755
Restaurants	\$301,445
Retail	\$493,945
Entertainment & Sightseeing	\$81,087
Local Transportation	\$21,652
Car Rental	\$47,078
Other	\$7,300
Meeting & event related spending	\$112,921
TOTAL SPENDING	\$1,394,185

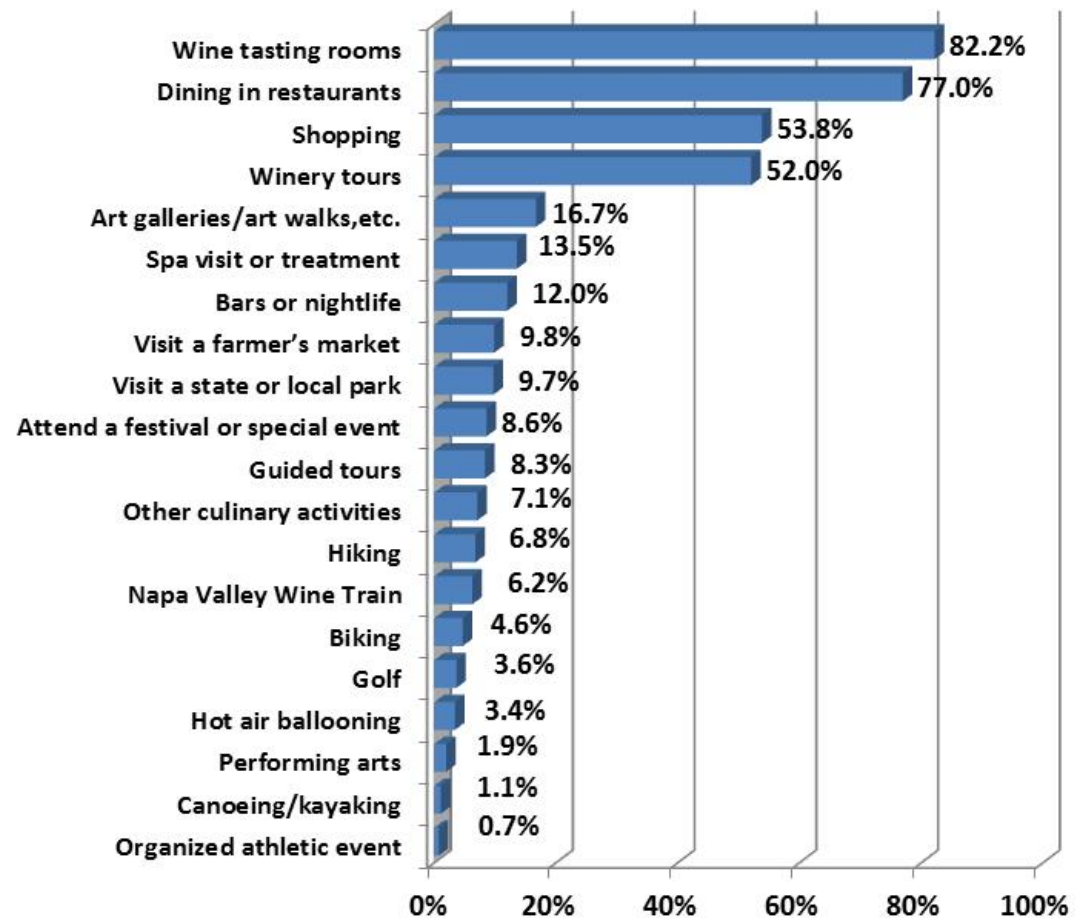


Most Liked Aspects of Napa Valley



Summary Results from a st

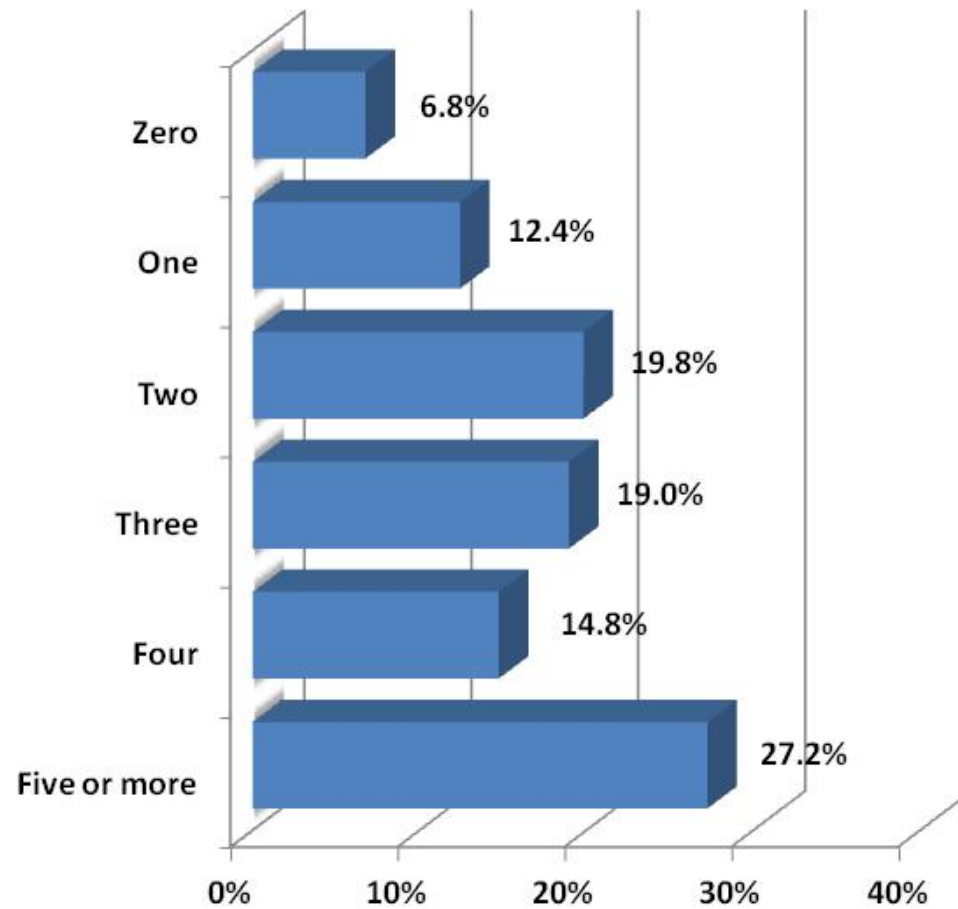
Activities & Attractions in Napa Valley



Summary Results from



Napa Valley Wineries Visited

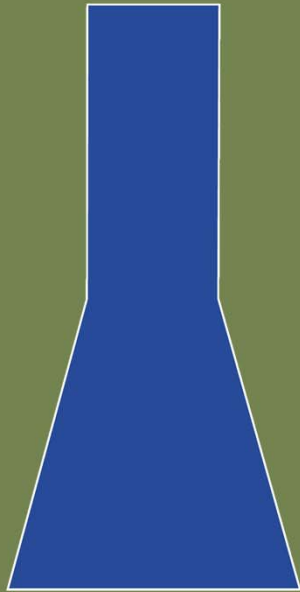


Summary Results from a study

C.

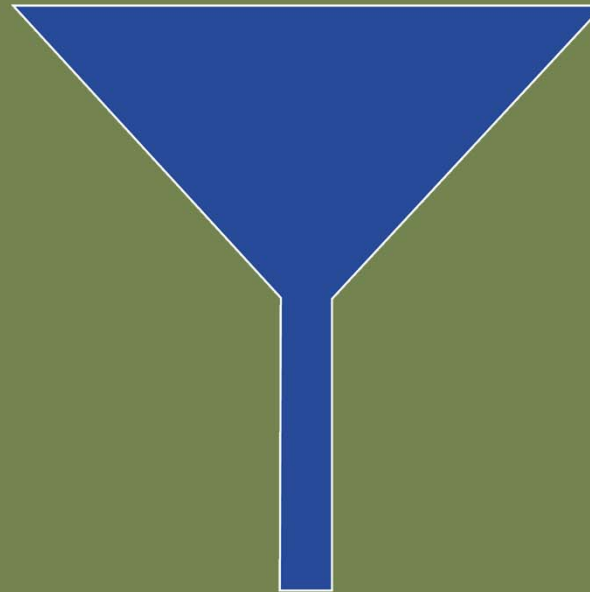
Wholesaler Environment has become Very Difficult for Smaller Wineries

1,800 Wineries 1995



3,000 Distributors in USA

5,000+ Wineries 2008



**700+ Distributors in USA
10 Distributors = 58% of Sales**



Therefore, Wineries Rely on Visitors for Preferred Distribution Channels

- **More than 90% of Wine Club Members sign up while at the Winery¹**
- **More than 90% of Wine Club Members surveyed responded that they would be “Very Likely” or “Somewhat Likely” to Consider Purchasing wine from a Winery in whose Club they were a member at Restaurants or Retail Stores/Wine Shops.²**
- **A study conducted by Robert Mondavi Winery indicated that Visitors to the Winery that either experienced a Tour and Tasting or joined the Wine Club gave RMW an average of 50% greater “share of Wine Wallet” on Robert Mondavi Winery wines when at home than wine consumers who had never visited the Winery or joined the Wine Club.**

¹ Free-Run Technology

² Destination Analysts, Inc.



Jobs & Fiscal Impact, 2012

- Tax revenues = \$51.7 million
- Total payroll = \$300 million
- Jobs supported = 10,500

Napa County FY14 TOT \$\$ and % of Budget by Jurisdiction

Jurisdiction	FY14 TOT Reported Revenue	% of Jurisdiction Budget
Yountville	\$6,261,476.00	66%
Calistoga	\$4,456,446.00	49%
City of Napa	\$15,129,048.00	20%
Unincorporated County	\$9,848,670.64	10%
St. Helena	\$1,729,887.00	10%
American Canyon	\$1,249,159.00	3%
	\$38,674,686.64	



In Perspective

- Visitors in Napa Valley on an average day = 13,409
- Visitor spending in Napa Valley on an average day = \$3.82 million
- Annual visitor spending per Napa Valley Resident = \$10,027
- Taxes collected per household = \$1,053

2005 vs. 2012 TOURISM DATA*

	2005 Results	2012 Results
Visitor Days	4.7 million	4.9 million
Average overnight guest stay	1.91 days	3.0 days
Average daily visitor spending in Napa Valley	\$2.5 Million	\$3.82 Million
Total visitor spending in Napa Valley	<\$1Billion	\$1.39 Billion
TOT collected	<\$20 Million	\$33.4 Million
ADR	\$150.38	\$243.07
Occupancy	67.4%	65.3%
Room Supply	3334 rooms**	4575 rooms**
Average Daily spend per overnight guest per day	\$233.47	\$355.28

*2005 study by Purdue University, 2012 study by Destination Analysts

**Data sourced from STR Data

Lodging Projects Financed/Breaking Ground 2015

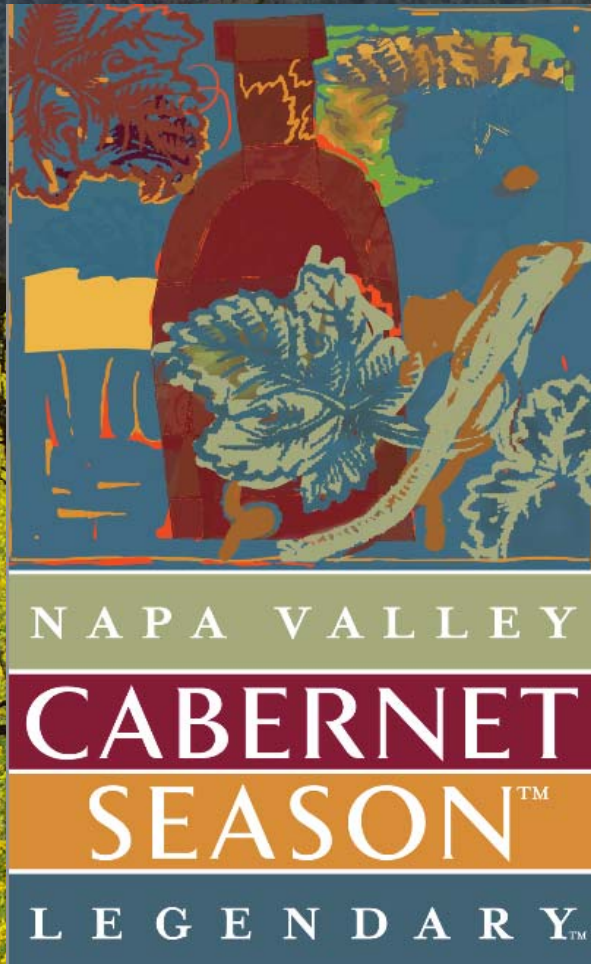
Project	Location	Rooms
Grandview	St. Helena	70
Silver Rose	Calistoga	84
Archer	Napa	185
Hampton Inn	Napa	115
Meritage	Napa	130
Vie Vage	Napa	110
Total		694

Napa Valley Destination Marketing

– Key Objectives

1. Build demand by effectively marketing legendary Napa Valley destination experiences to consumers through targeted domestic and international media and Leisure and Group markets.
1. Drive targeted growth and support visitor management through marketing programs that promote "off peak" seasonal and Sunday through Thursday travel patterns
2. Support the delivery of consistent destination information and legendary guest services to our guests.

Targeted Time Periods:
Low Occupancy Periods



November – April
Sunday – Thursday nights

Tourism in Napa County

March 10, 2015

