



THE NAPA VALLEY<sup>®</sup>  
*Legendary.*

Use of Data in Napa Valley Tourism  
CAIR Conference  
November 22, 2013

Clay Gregory  
CEO/President  
Visit Napa Valley



An aerial photograph of a vineyard in Napa County, California. The rows of grapevines are planted in a terraced pattern on a hillside, with the vines appearing as dark green lines against the reddish-brown soil. The background shows more of the vineyard and some trees under a clear sky.

# **Agenda**

**Introductions**

**Smith Travel Research Report**

**2012 Visitor Profile Study**

**2012 Economic Impact of Tourism in Napa County**



## Visit Napa Valley (VNV)

Official tourism marketing organization for Napa County

### Mission:

Promote, protect and enhance the Napa Valley's position as North America's premier wine, food, arts and wellness region.

## Fiscal 2014 VNV Board of Directors

**Stan Boyd**

Holiday Inn Express

**Chris Canning**

Calistoga Chamber of Commerce

**Steve Carlin**

Oxbow Public Market

**Ann Marie Conover**

Meadowood Napa Valley

**Stephen Corley**

Monticello Vineyards

**Michael Dellar**

Lark Creek Restaurant Group

**David Francke**

Michael Mondavi Family Estate

**George Goeggel**

Auberge du Soleil

**Clay Gregory**

Visit Napa Valley

**Charles Henning**

Charbay

**Michael Palmer**

The Meritage Resort

**Linda Reiff**

Napa Valley Vintners

**Michaela Rodeno**

Villa Ragazzi

**Rick Swig**

Harvest Inn

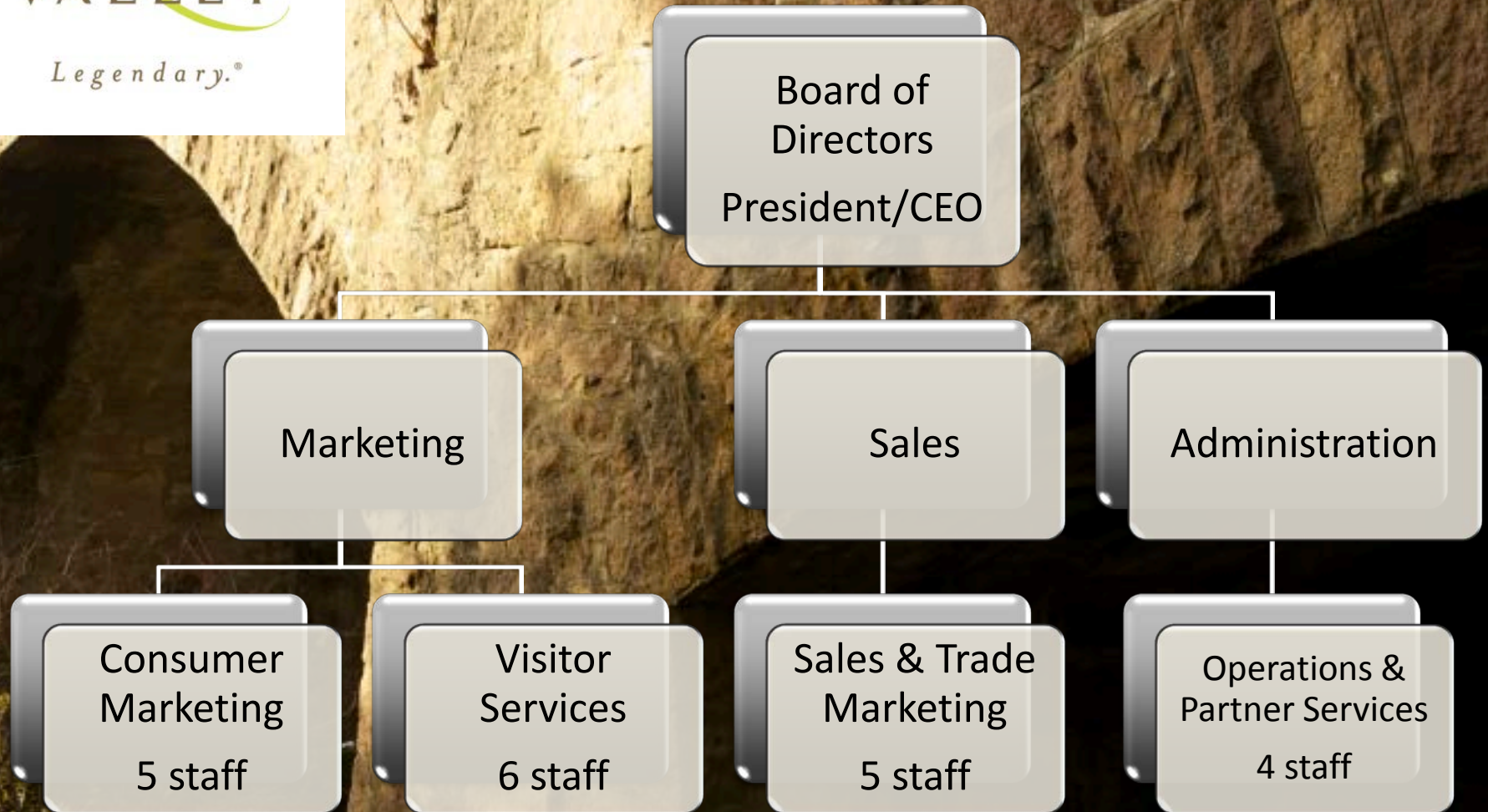
**Larry Florin**

County of Napa

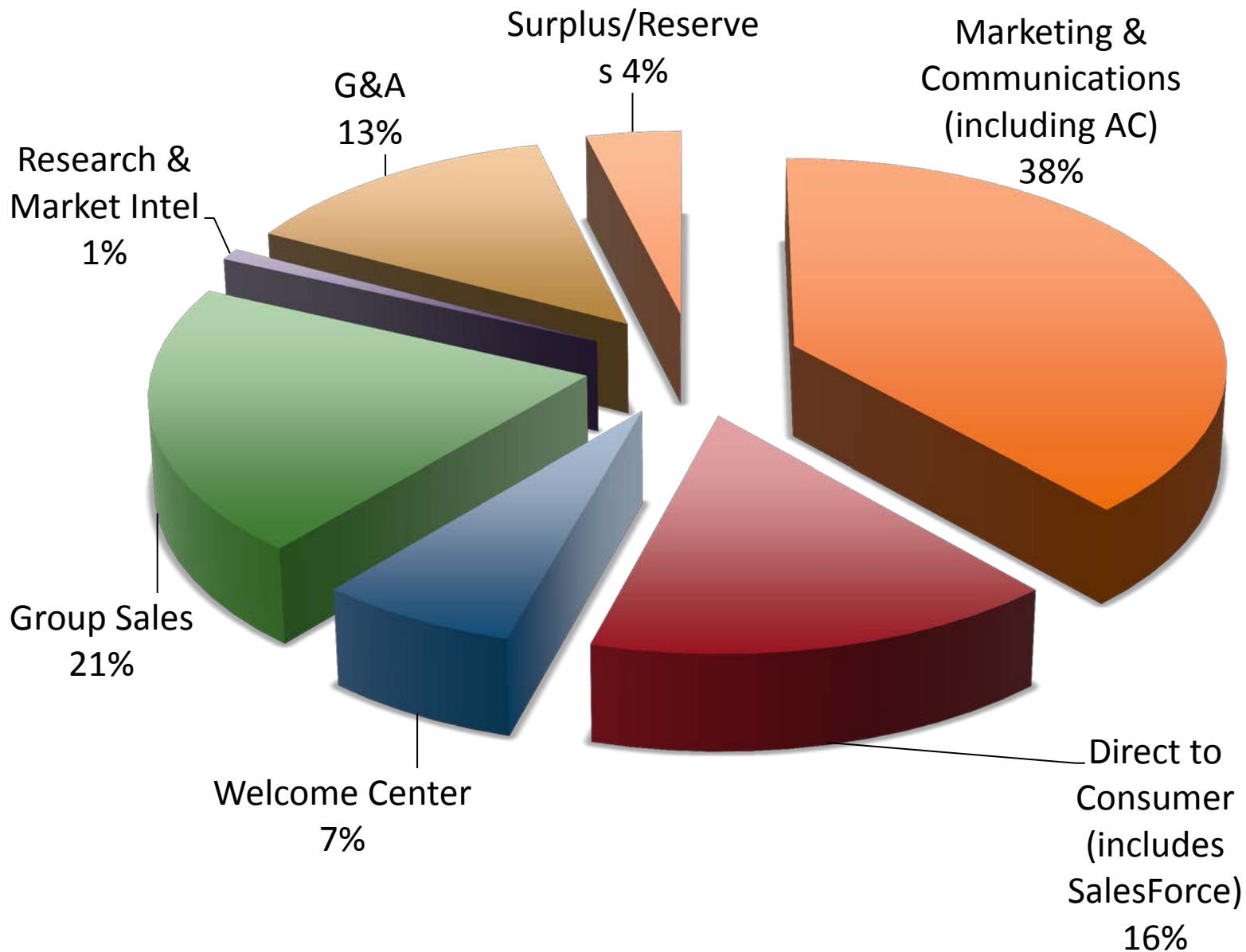
**Michael Woods (Chair)**

Mount View Hotel & Spa

# Fiscal 2014 VNV Organization Structure



# FY 2014 VNV Budget: \$5,198,431





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FY 2013  
Smith Travel Research  
Key Results



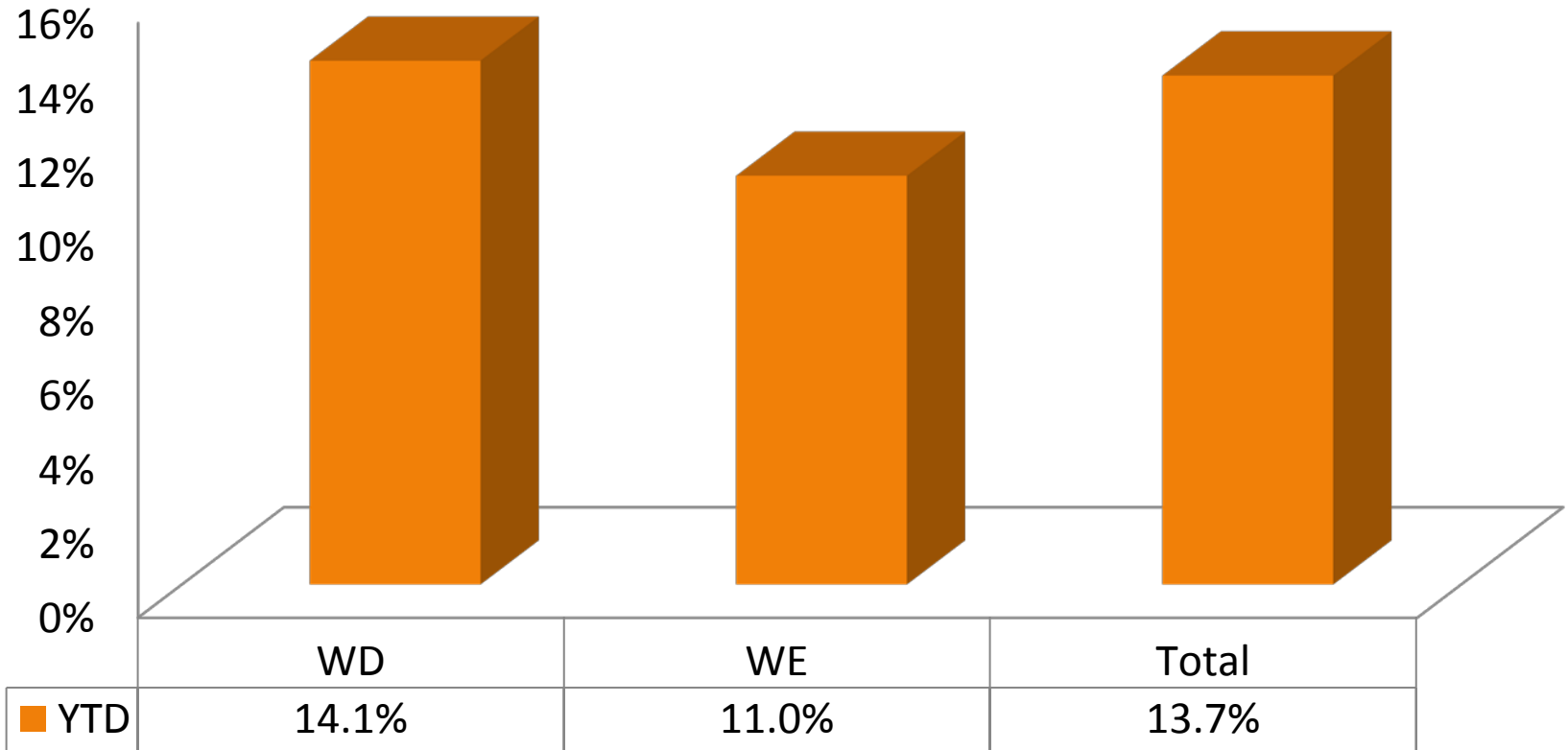
# Smith Travel Research Data

Reporting: 70% of total rooms

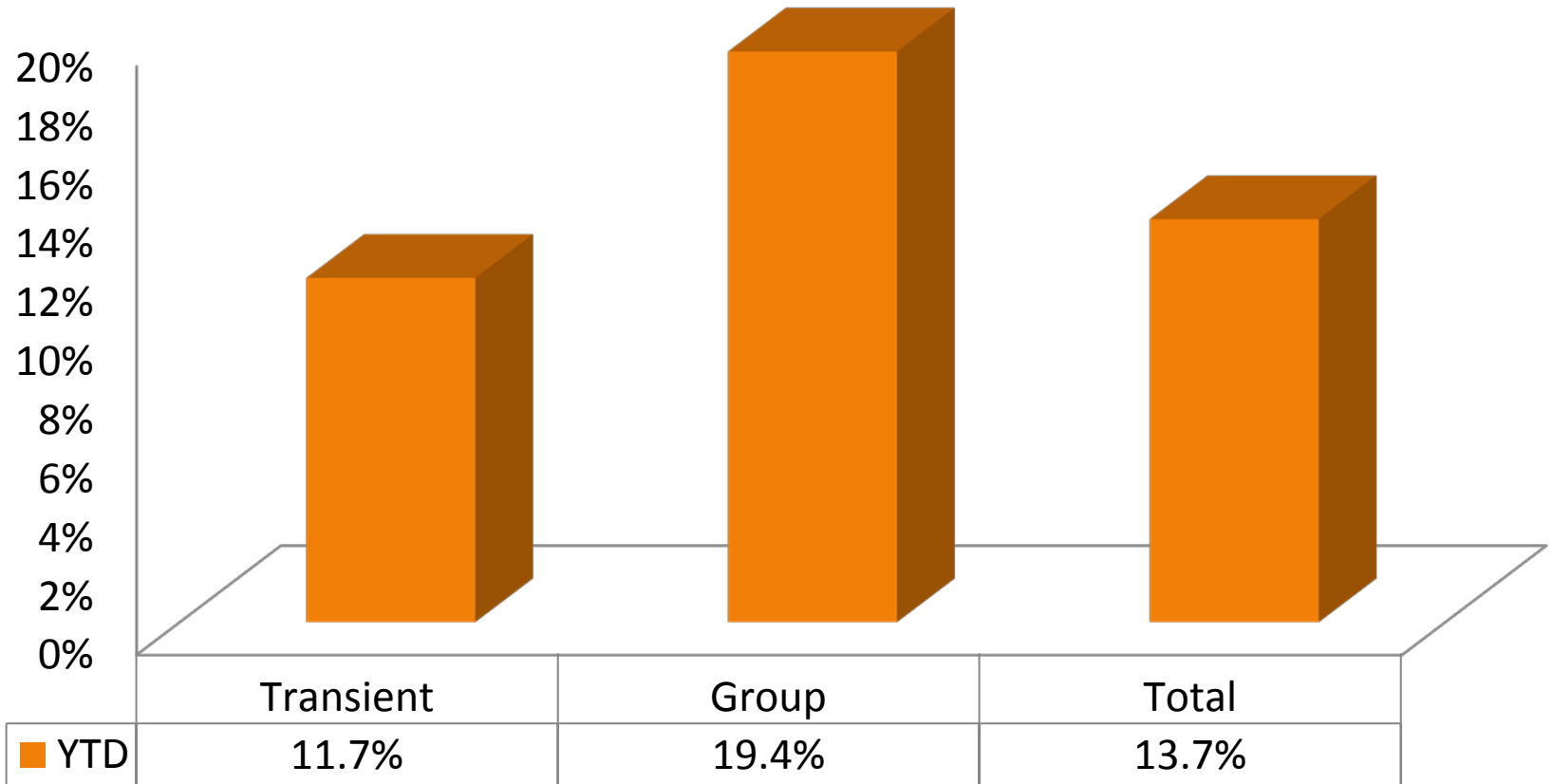
	September 2013	% Change
Occupancy	80.3%	+.4%
ADR	\$315.55	+8.6%
RevPAR	\$253.46	+9%
Revenue	\$35.1m	+8.5%



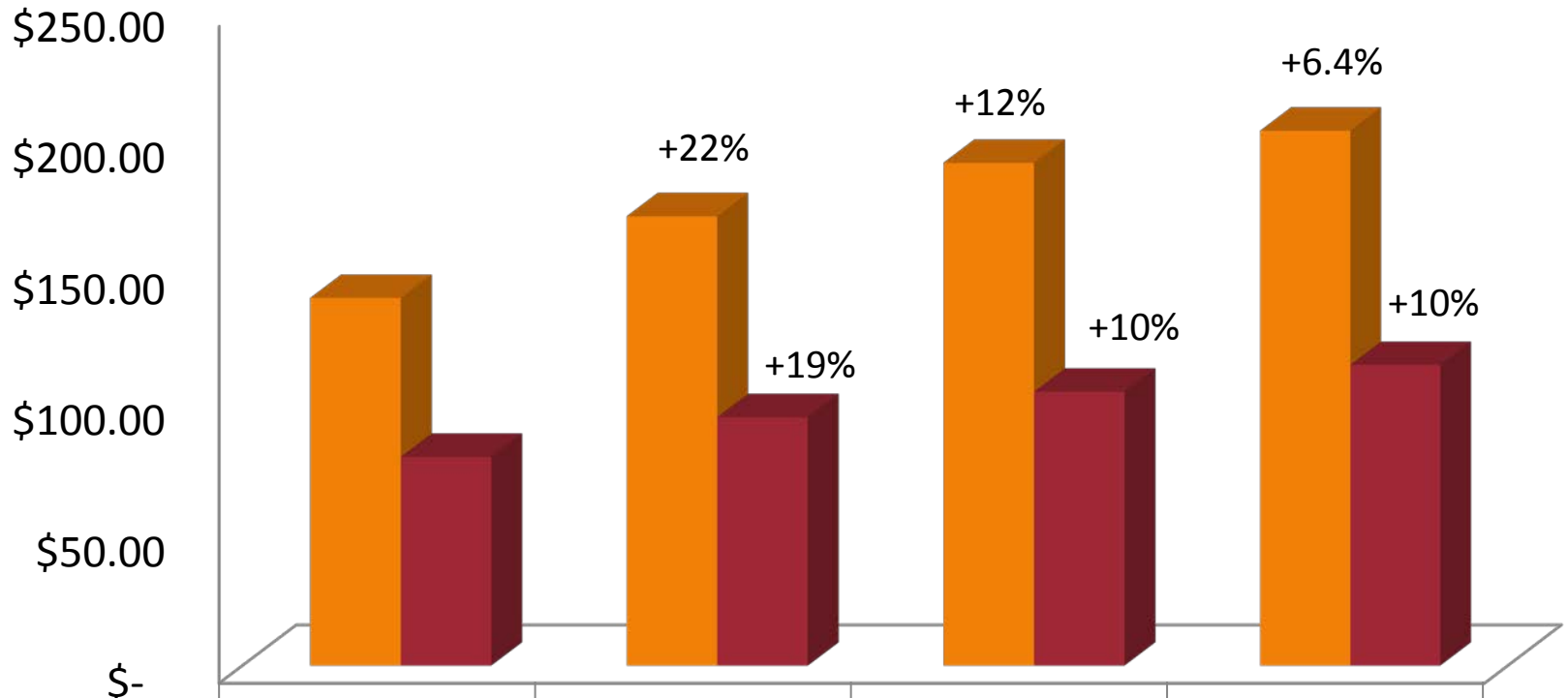
**NAPA COUNTY**  
**Lodging Industry**  
**% Growth in RevPAR**  
**Weekday vs Weekend**  
**YTD 2013 vs YTD 2012**



**NAPA COUNTY  
Lodging Industry  
% Growth in RevPAR  
Transient vs Group  
YTD 2013 vs YTD 2012**

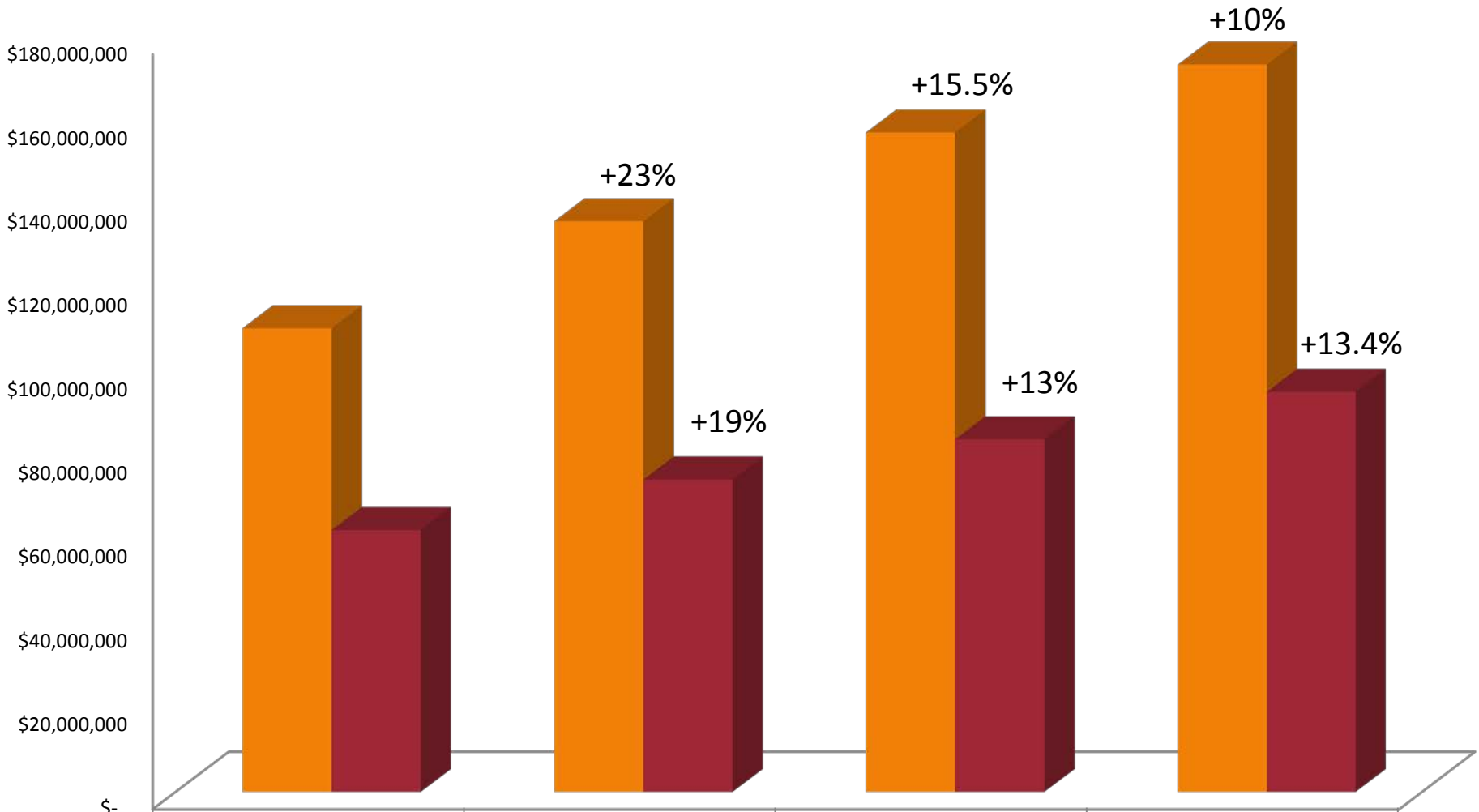


# NAPA COUNTY Lodging Industry RevPAR in \$ High Season vs Low Season



	2009/2010	2010/2011	2011/2012	2012/2013
High Season	\$140.03	\$171.11	\$191.42	\$203.60
Low Season	\$79.60	\$94.72	\$104.35	\$114.57

# NAPA COUNTY Lodging Industry Revenues in \$ High Season vs Low Season



	2009/2010	2010/2011	2011/2012	2012/2013
High Season	\$110,603,454	\$136,102,223	\$157,265,054	\$173,435,348
Low Season	\$62,541,317	\$74,565,311	\$84,178,557	\$95,479,217



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## 2012 Visitor Profile Study





DESTINATION ANALYSTS

**Visit Napa Valley**  
**2012 Napa Valley Visitor Profile**  
**Report of Findings**

# Research Methodology:

## Lodging Guest Survey

- Self-administered
- Distributed at 57 Napa Valley hotels, resorts, bed & breakfasts and vacation rentals: April 24th through May 8th, July 23rd through August 11th and October 1st – 15<sup>th</sup>
- Returned via business reply mail
- 835 completed surveys were returned by November 12th

## Visitor Intercept Survey

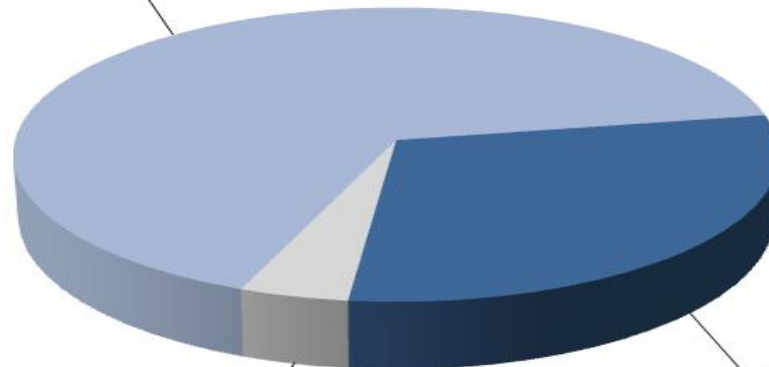
- In-person interview of Napa Valley visitors
- Administered by survey staff via iPad (respondent completed demographic questions on his/her own)
- Day-Trip and VFR visitor segments completed full survey
- Conducted April 21st and 26th-28th; May 11th; July 26th – 28th; August 24th, October 4th – 7th
- Locations around Napa Valley
- 924 visitors interviewed (637 Day-Trip and VFR visitors)

# Napa Valley Visitor Volume—2012

## *Visitor Volume, 2012*

Day-trip Visitors	1,962,299
Lodging Guests	875,650
VFR Visitors	124,585
<b>Total</b>	<b>2,962,535</b>

Day-trip  
visitors, 66.2%



Lodging Guests,  
29.6%

VFR Visitors,  
4.2%



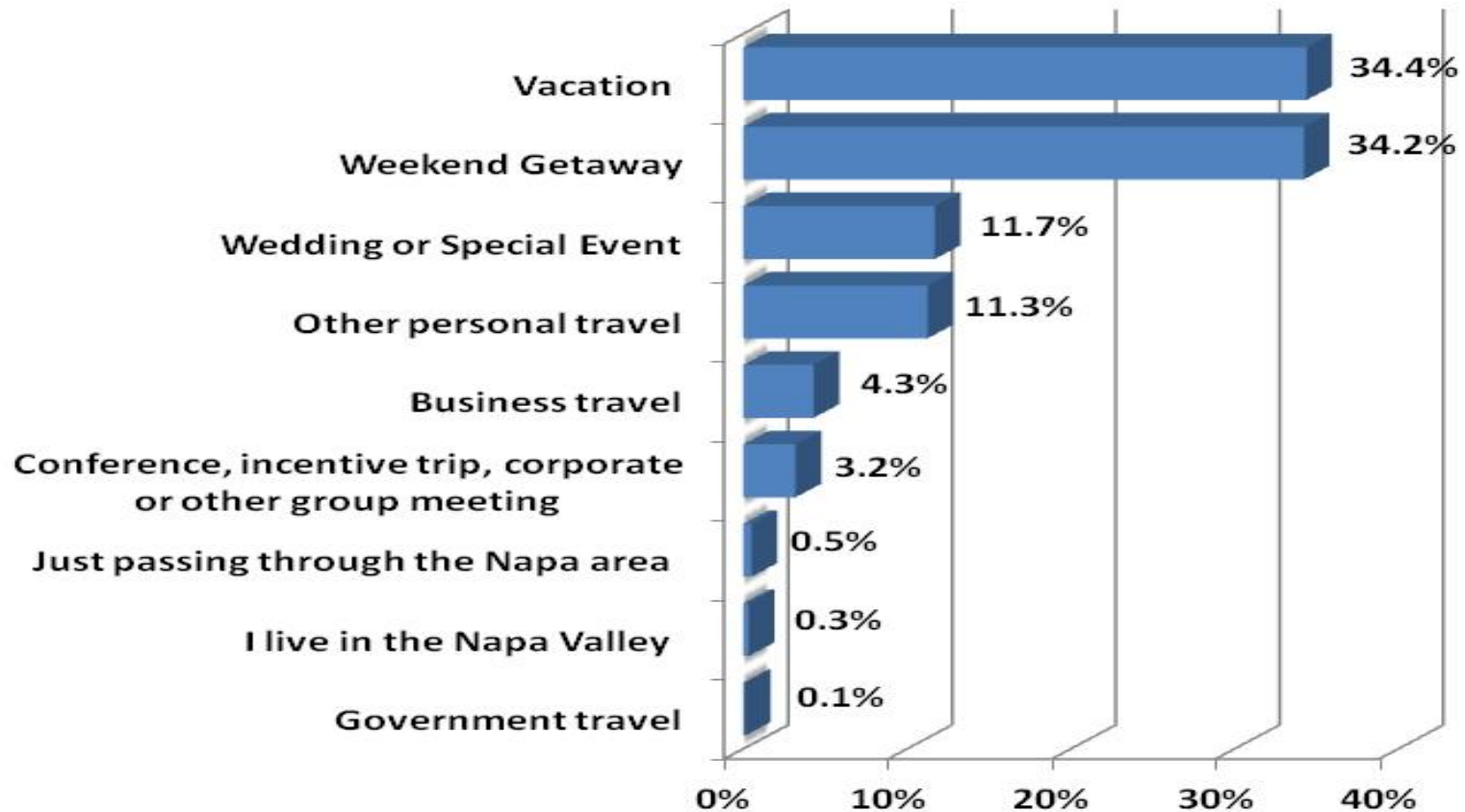
# Primary Reason for Visit - Leisure

34.4 % Vacation

34.2% Weekend Getaway

11.7% Wedding or special event

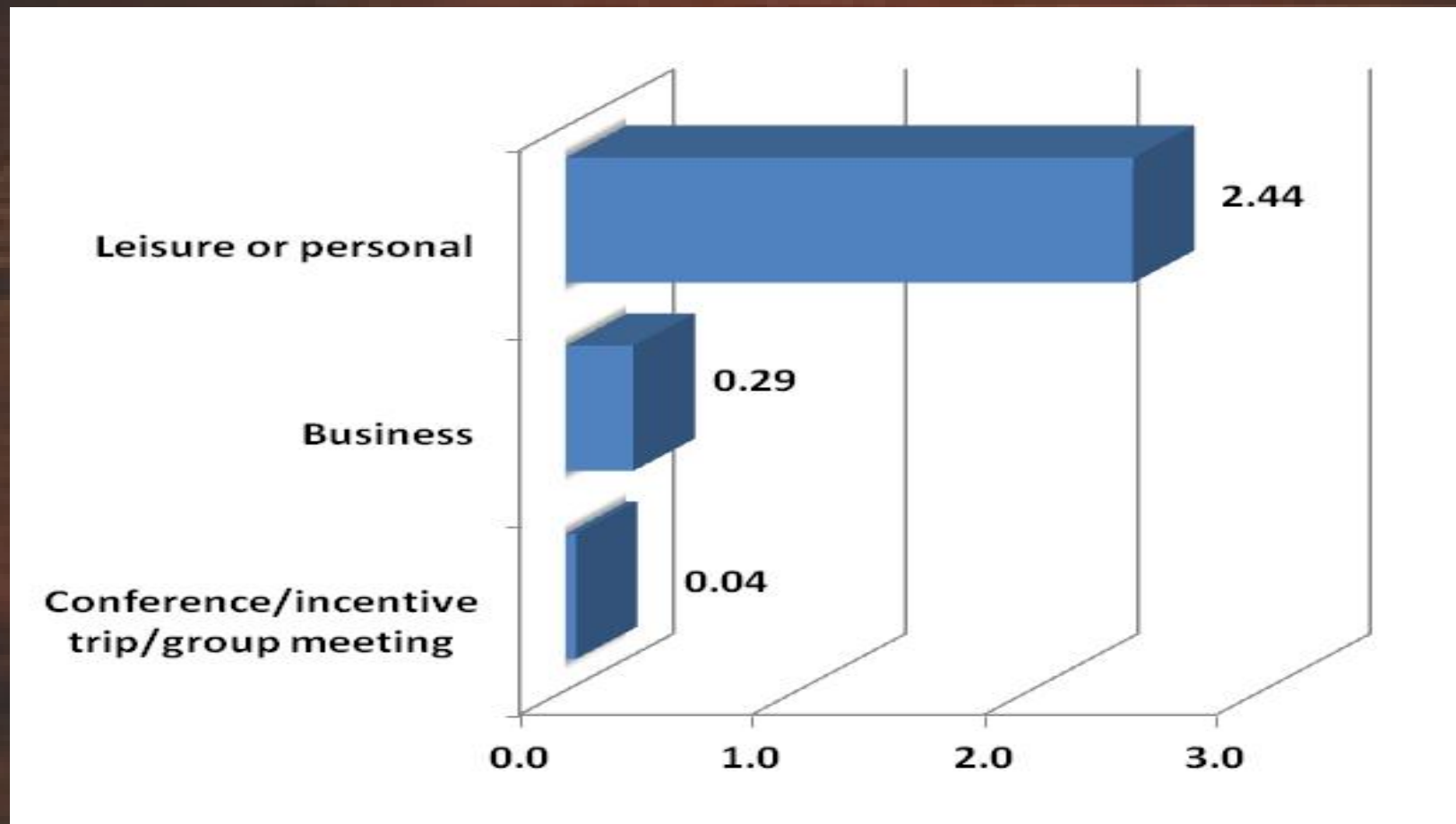
7.6% Business, conference, or government travel purposes



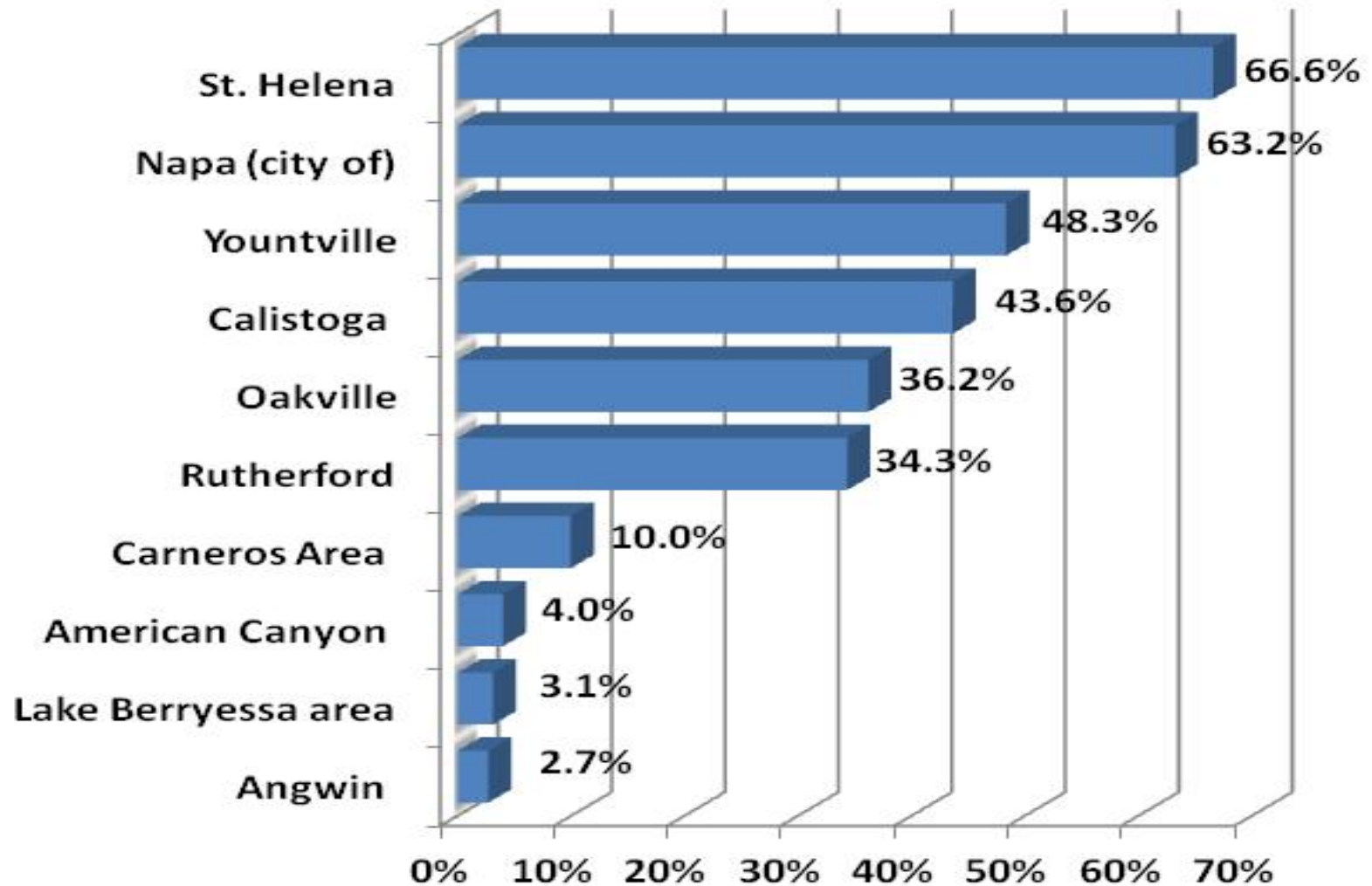
# Visits to Napa Valley in Past Twelve Months

Average 2.8 trips in past twelve months

- Day-trippers average 3.1 trips per year
- Lodging guests average 2.0 trips
- VFR average 1.9 trips

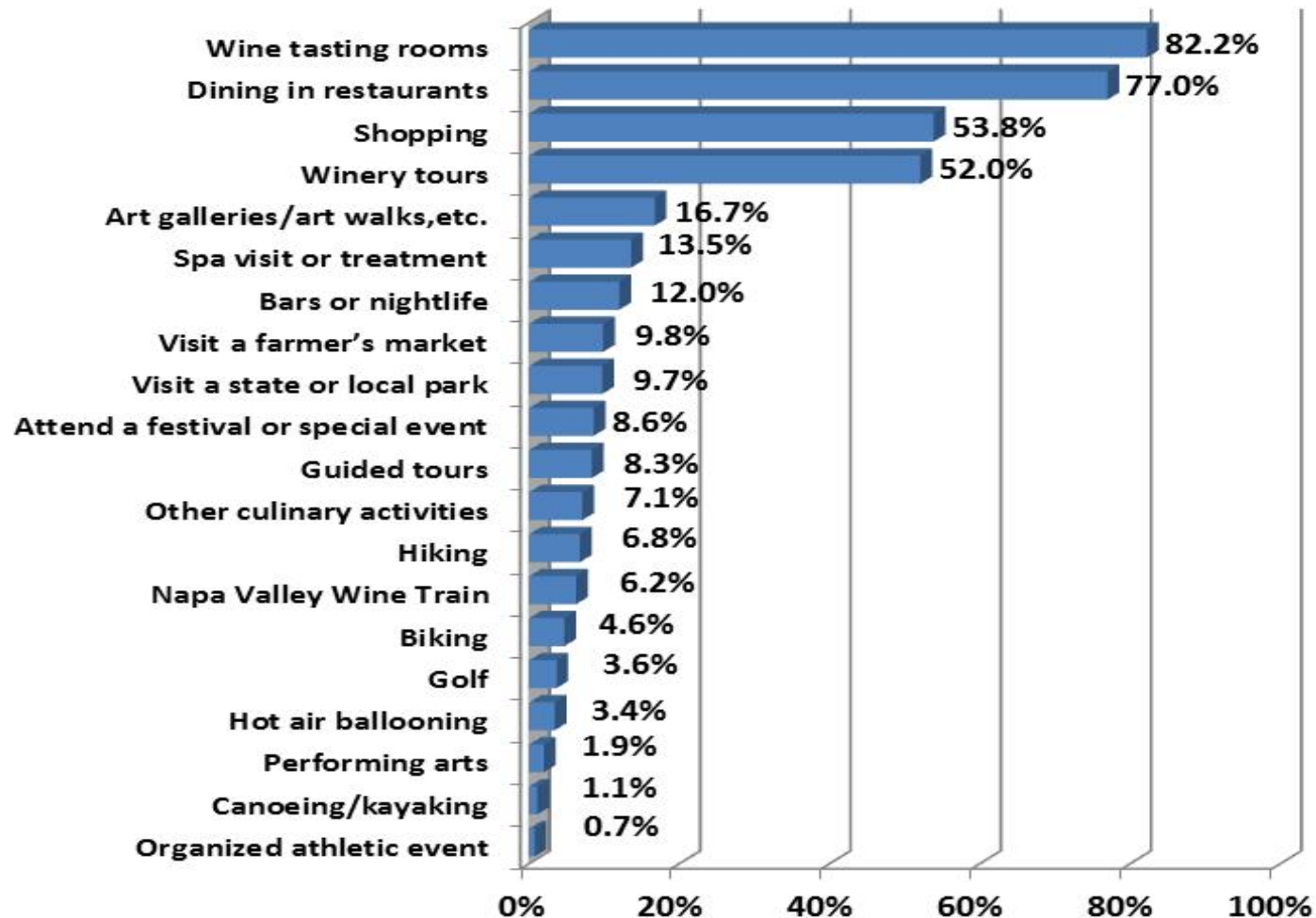


# Napa Valley Towns Visited



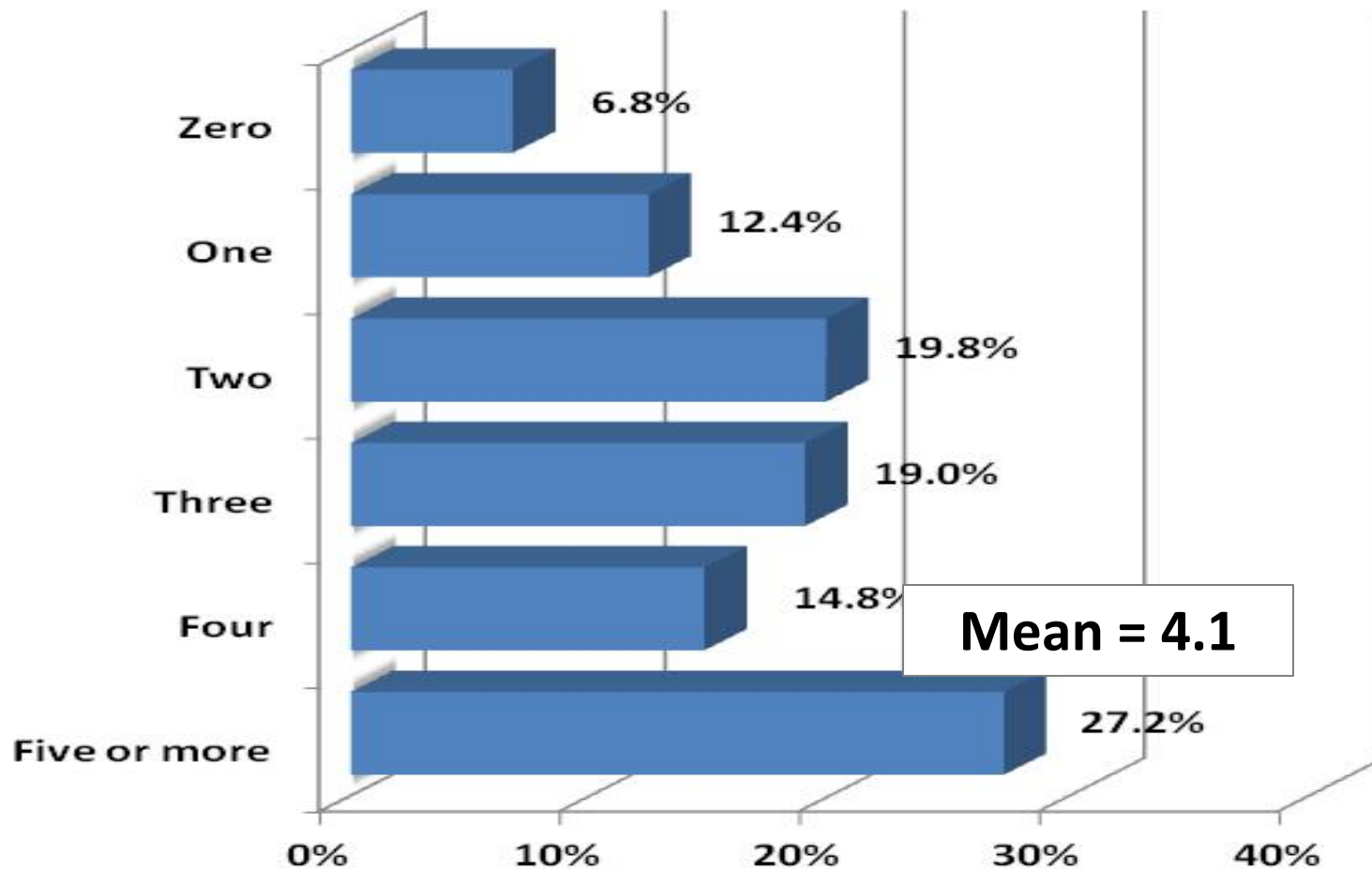
# Activities & Attractions in Napa Valley

- 82.2% Wine tasting rooms
- 77% dining in restaurants



# Napa Valley Wineries Visited

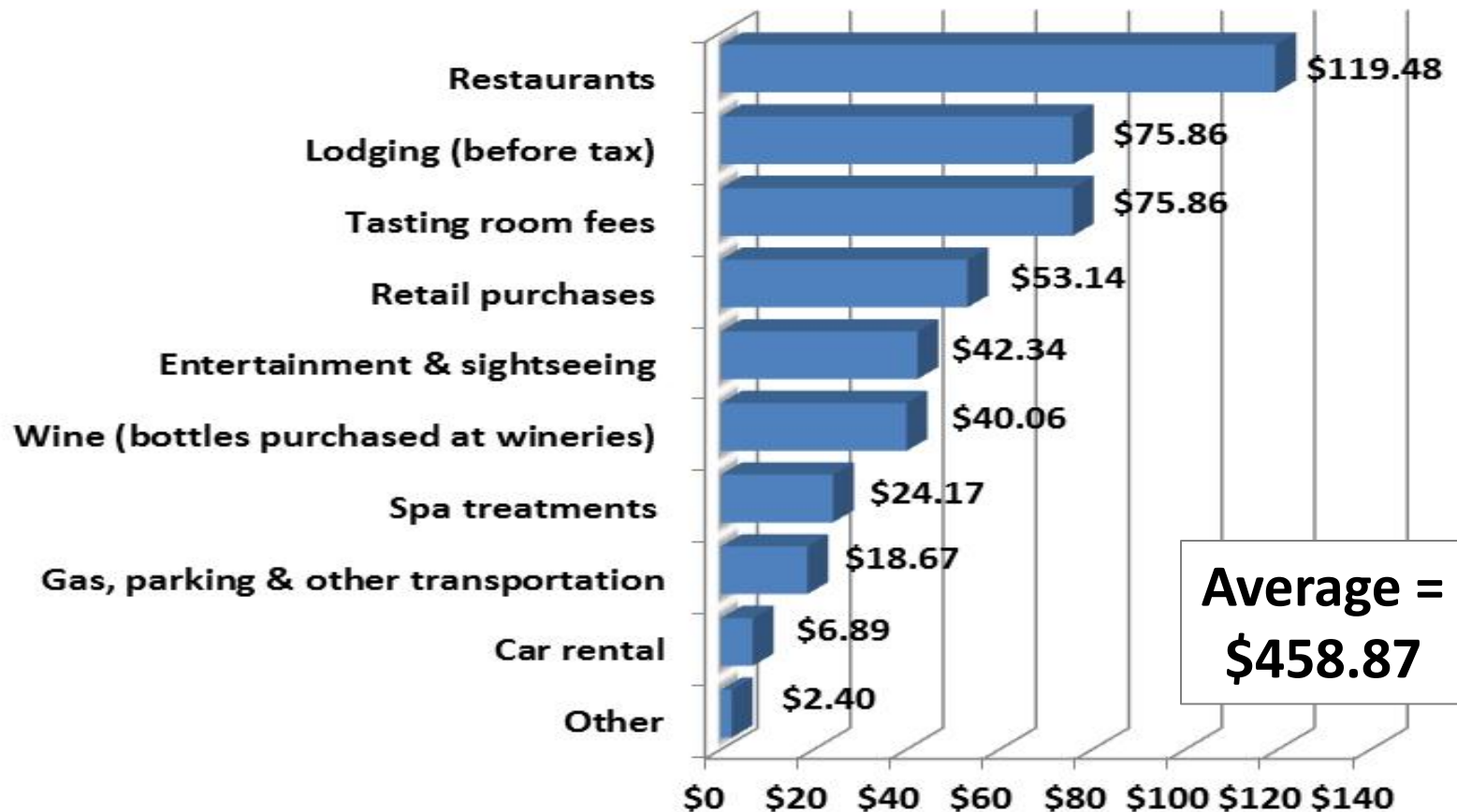
- 4.1 wineries or tasting rooms on average
- Lodging Guests average 5 wineries per visit
- Day-trippers visitor average 3.5 wineries



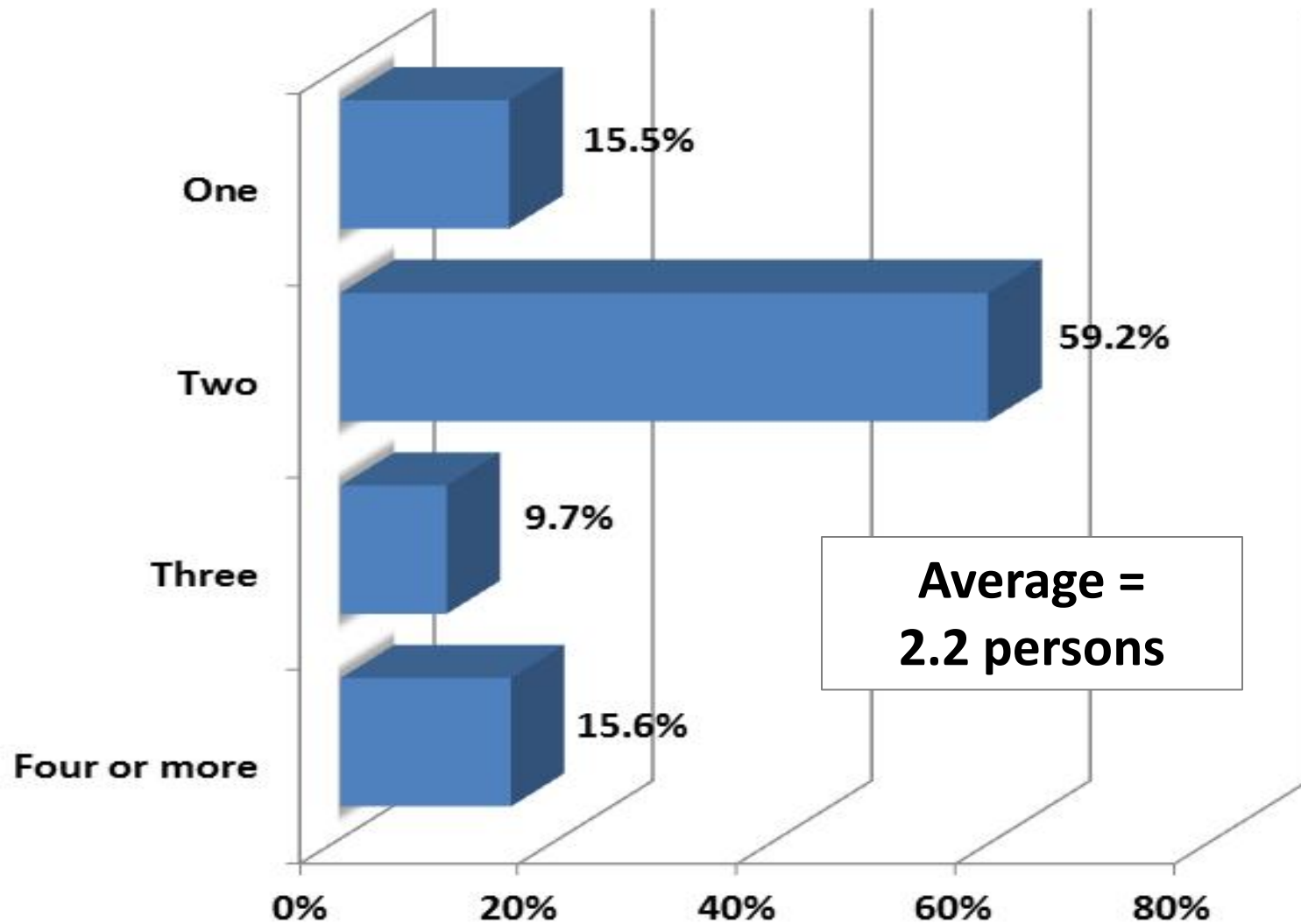
# Visitor Average Spending in Napa Valley

Average \$458.87 per day

- Lodging guests spend \$708.47
- VFRs spend \$447.44
- Day-trippers spend \$349.78



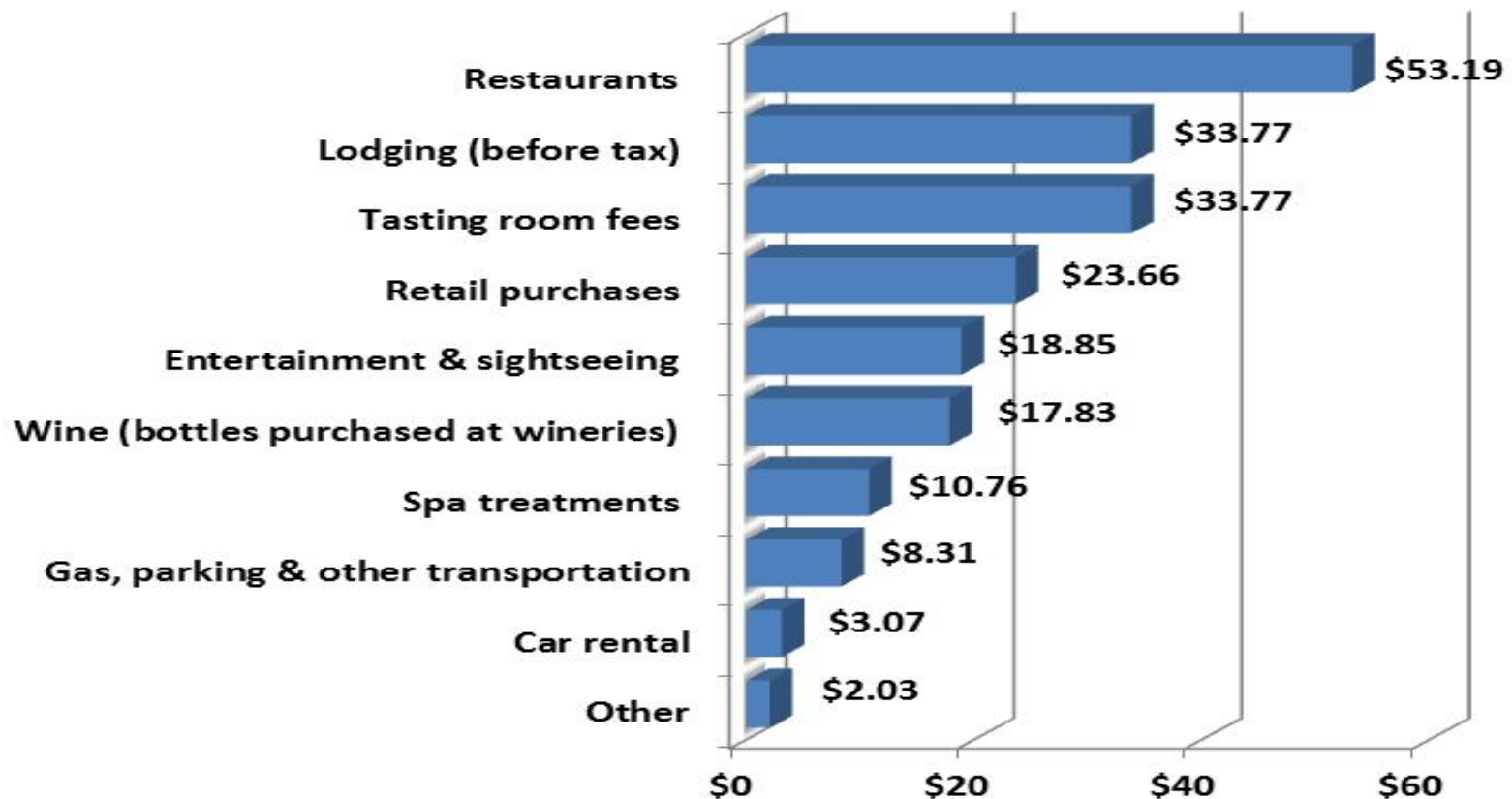
# Number of Persons Covered by Spending



# Average Daily Visitor Spending (Per Person)

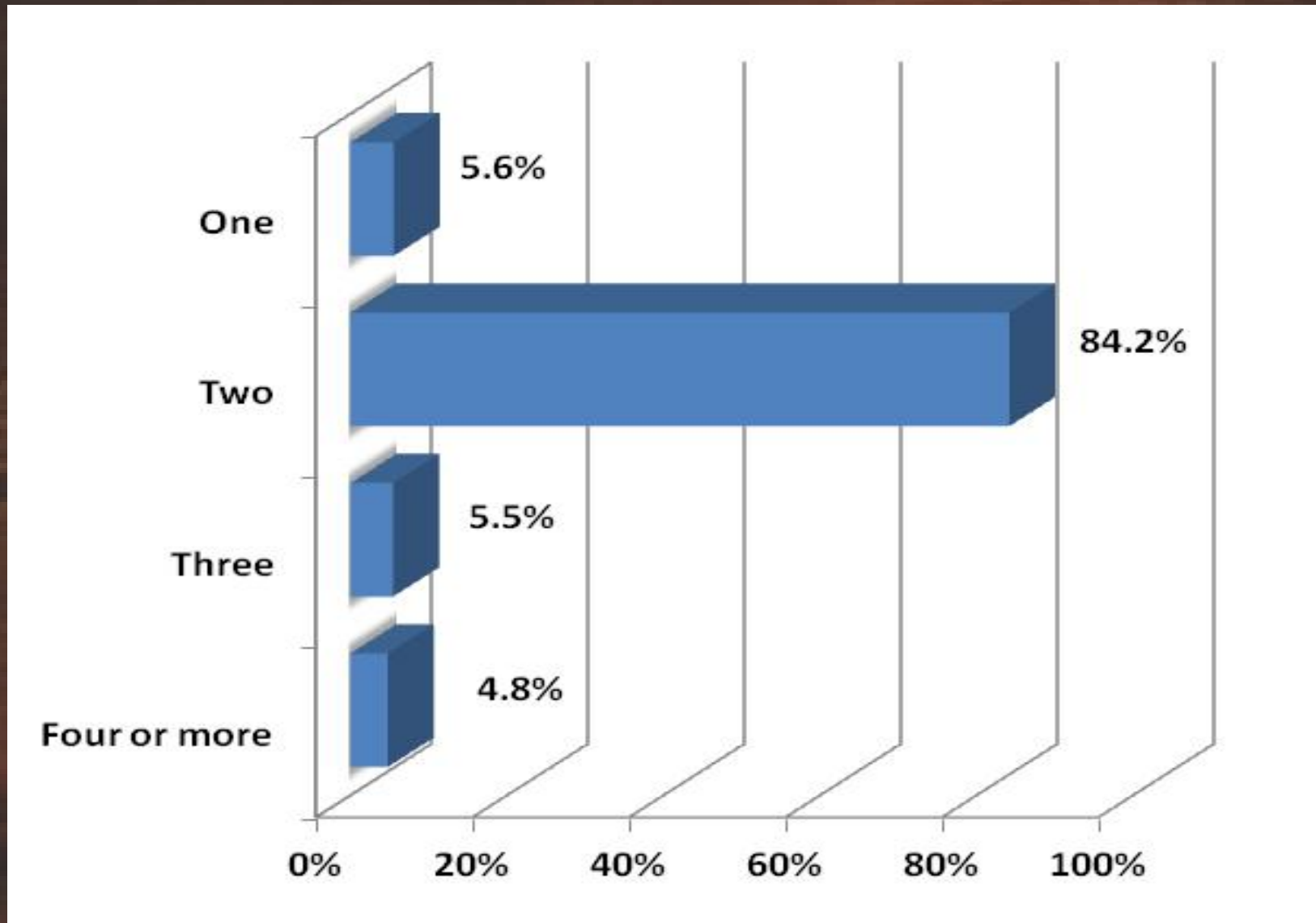
Average \$205.26 per day

- Lodging guests spend \$355.28
- VFRs spend \$197.50
- Day-trippers spend \$151.39





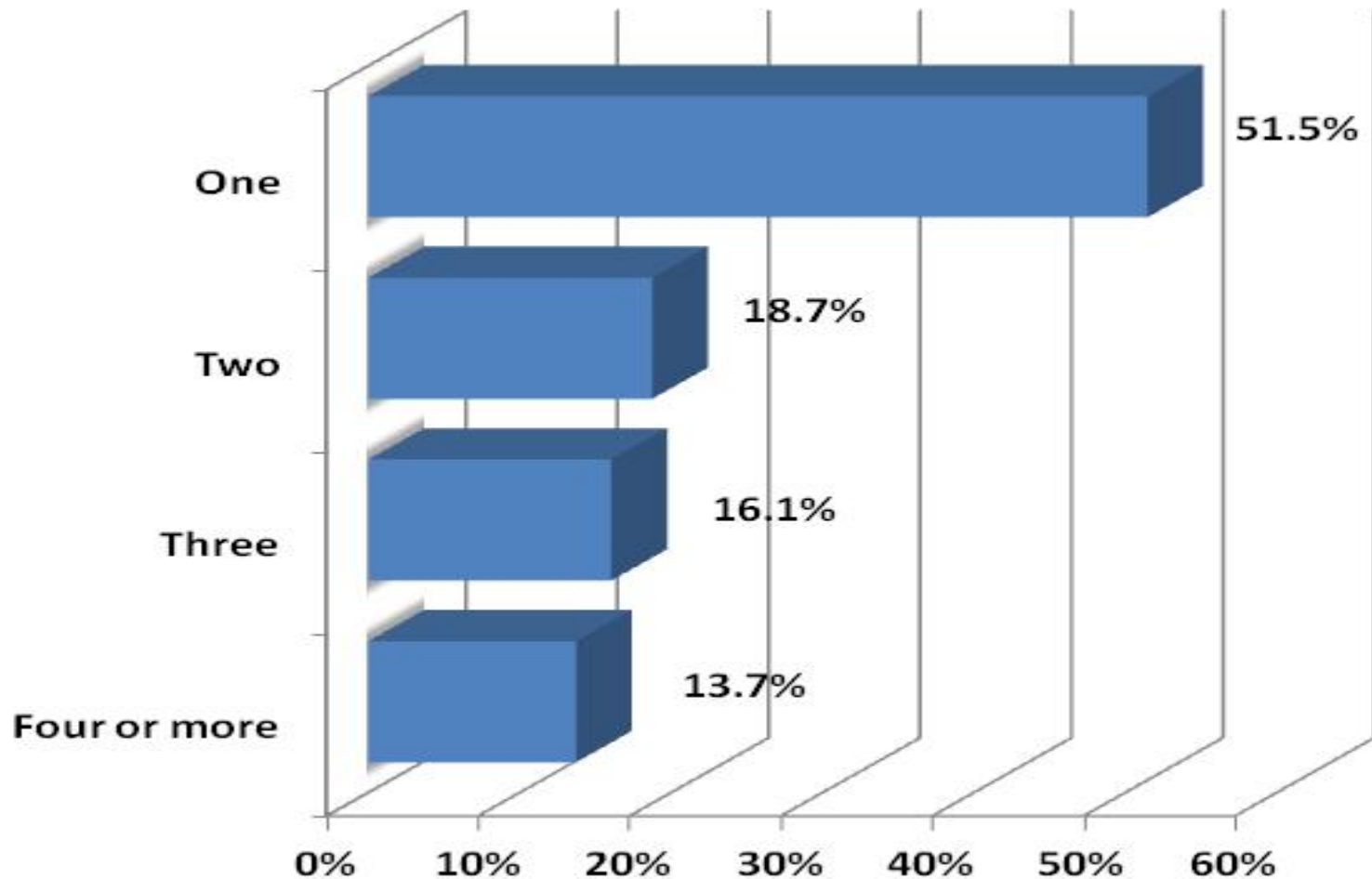
# Number of Persons in Hotel Room: 2.1 Guests



# Average Days Spent in Napa Valley: 2.1 Days

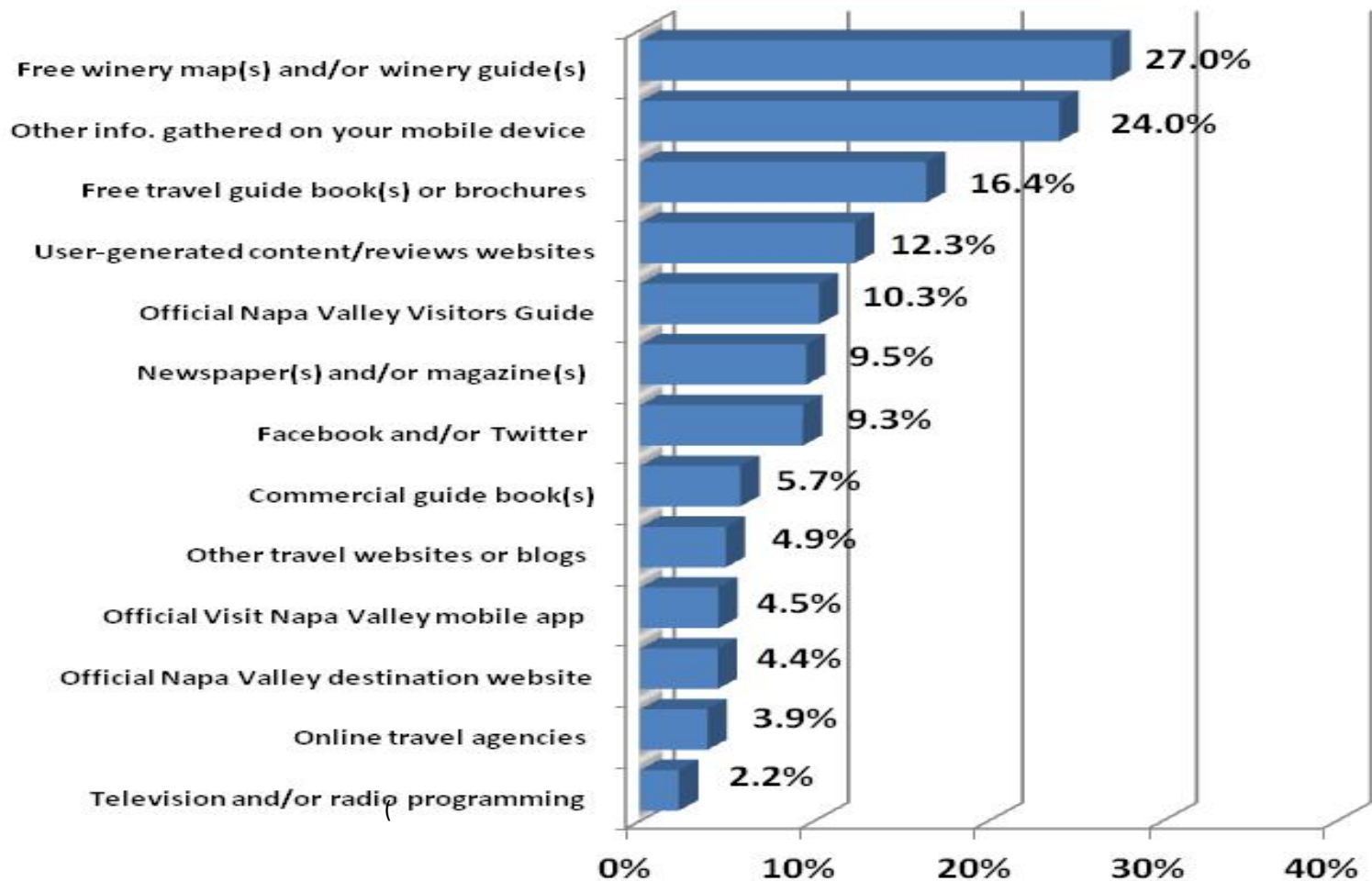
Average 2.1 Days

- Lodging & VFRs: 3.0 Days



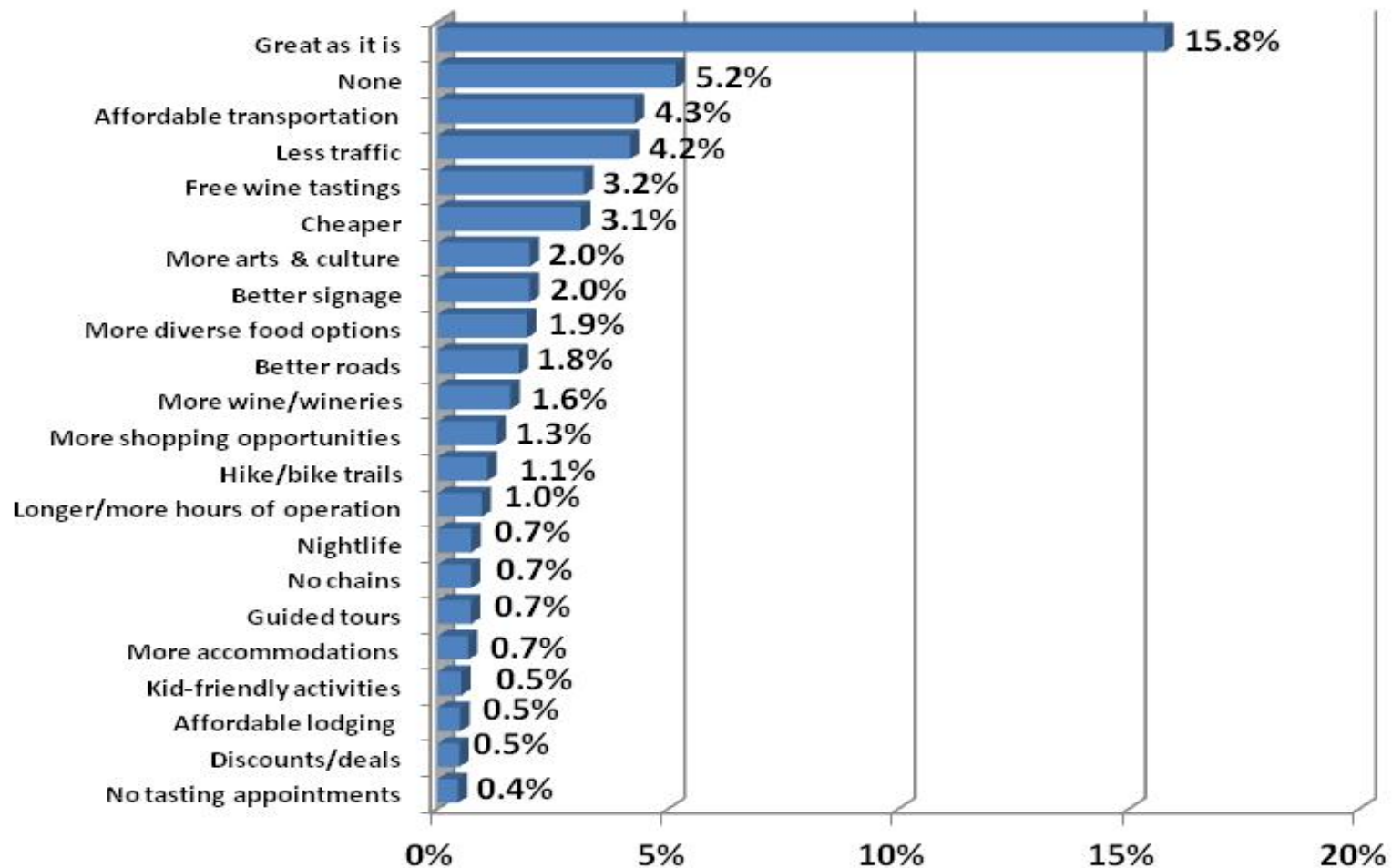
# Planning Resources Used After Arrival

- 27% Free winery maps and/or guides
- 24% Mobile device



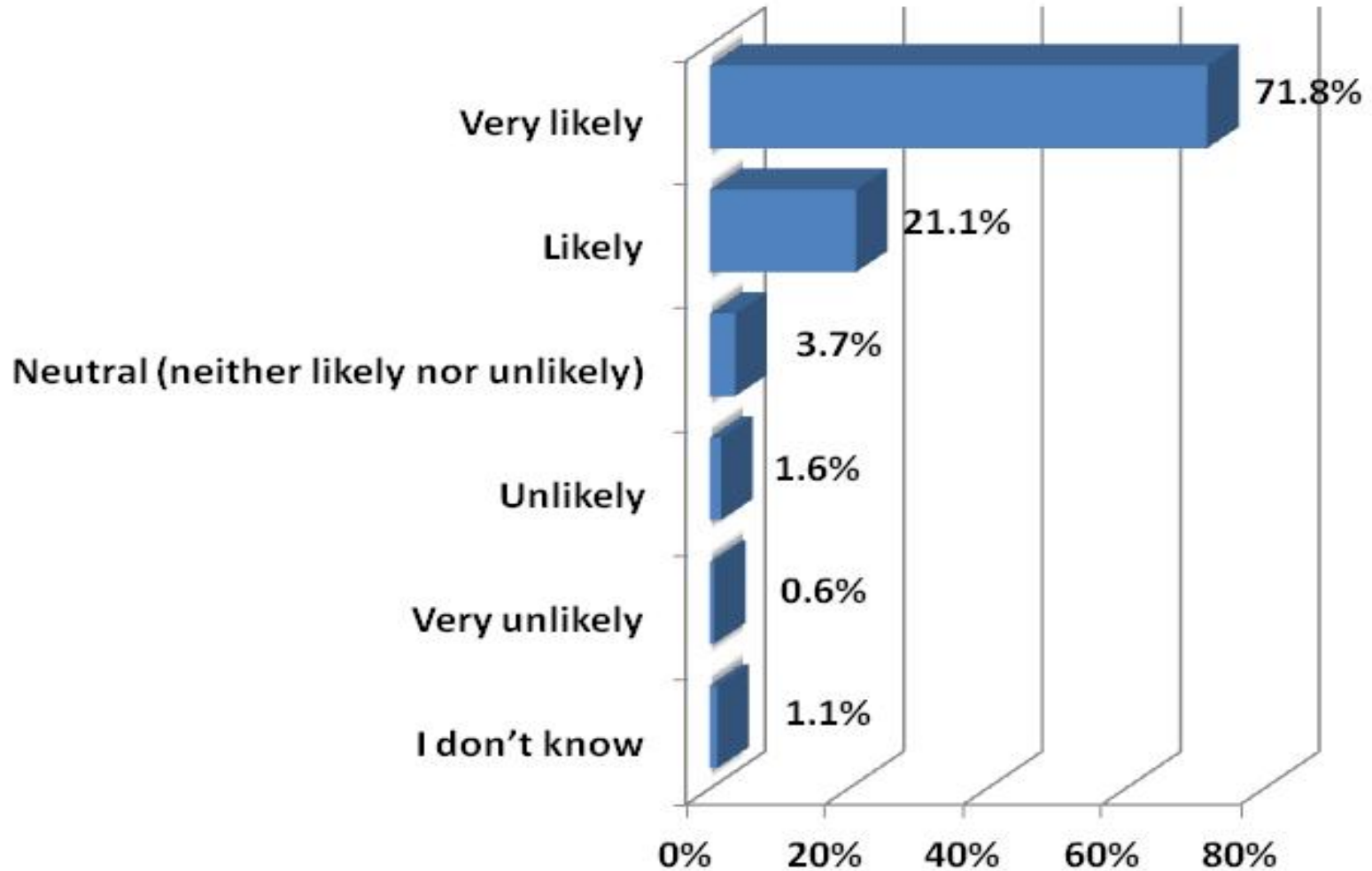
# Enhancing the Napa Valley Experience

- 15% Great as it is
- 4.3% More affordable transportation
- 4.2% Less Traffic



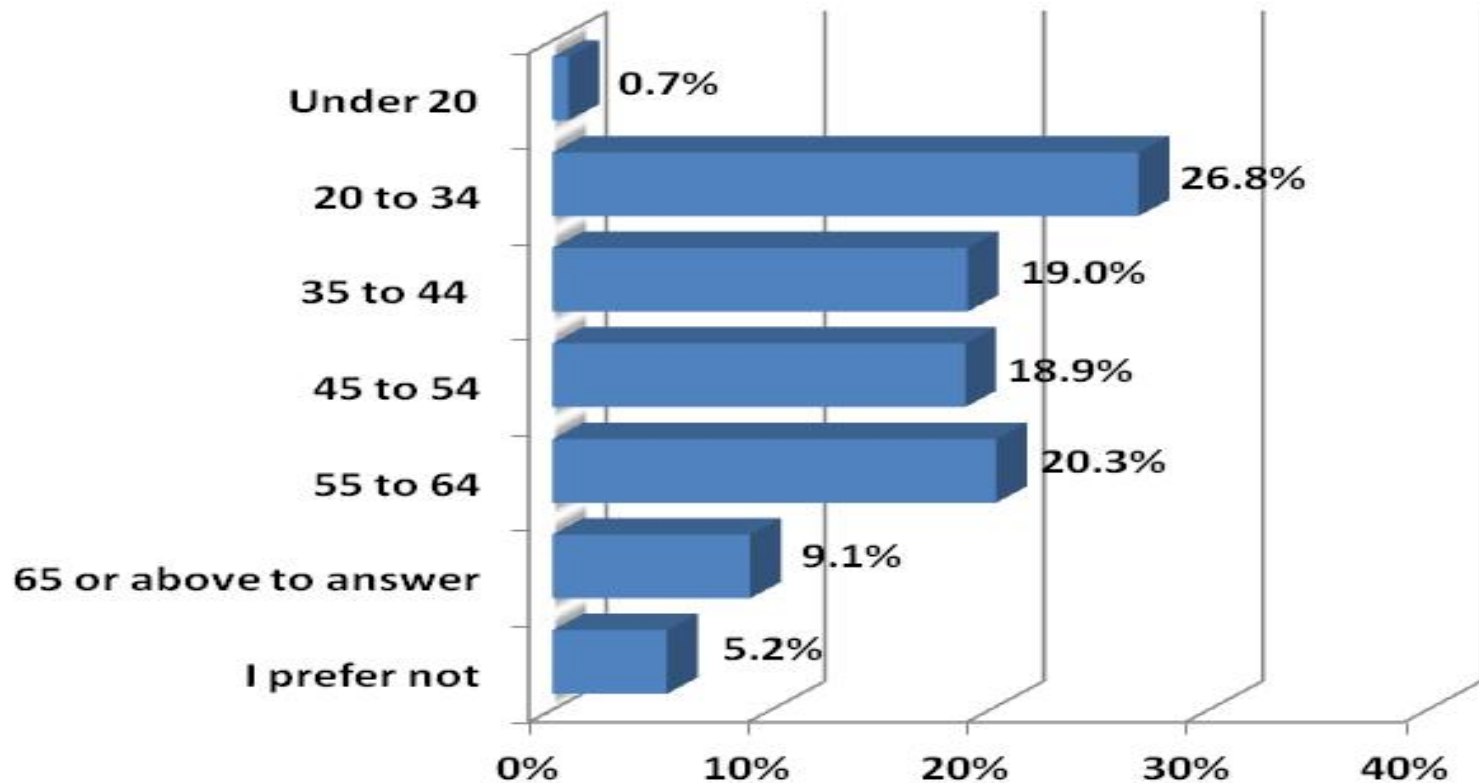
# Likelihood to Return to Napa

- 92.9% Likely or Very Likely to return



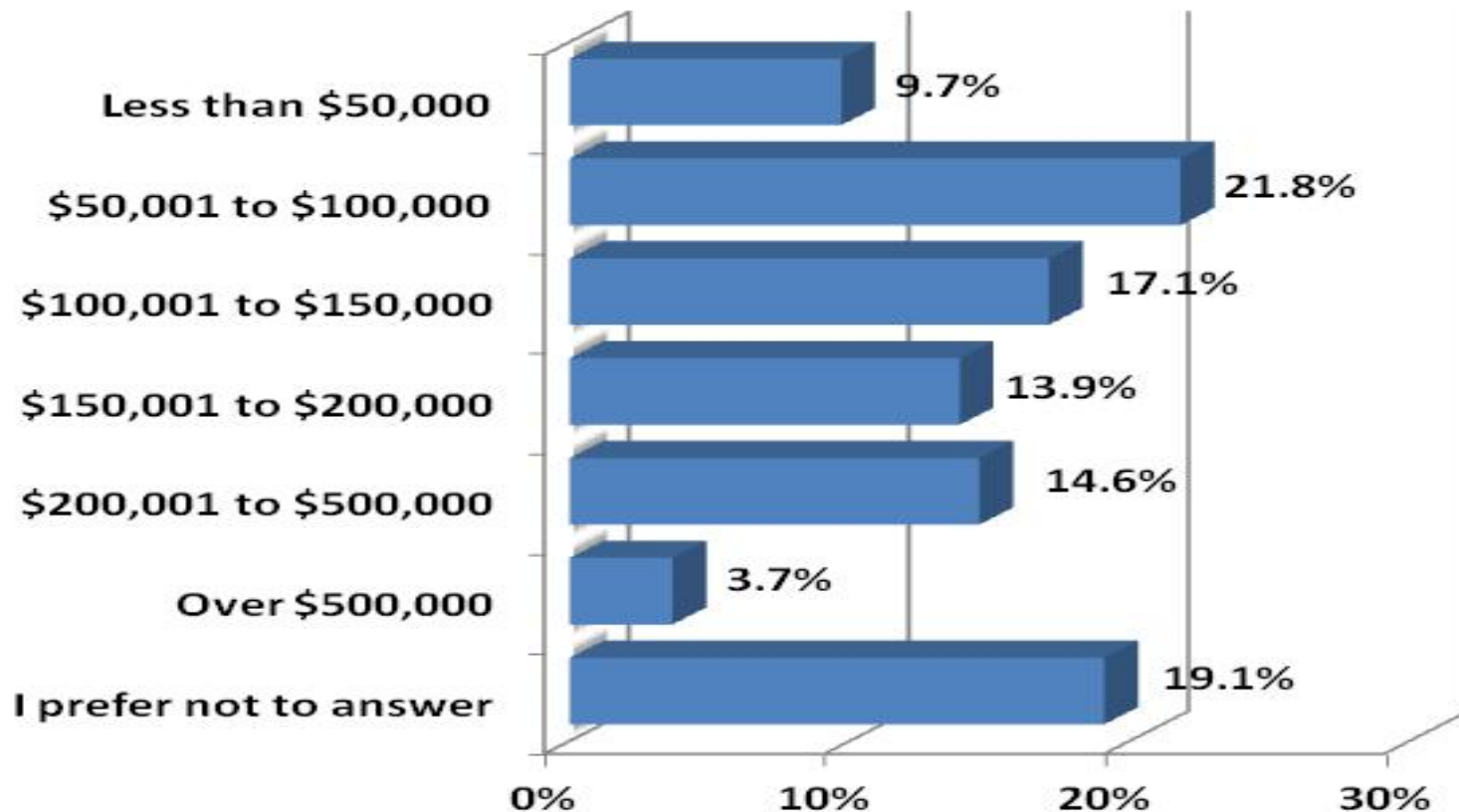
# Average Age

- 67% are older than 35 years or older
- 29.4 % are over 55 years old
- Lodging guests 52 years
- VFRs 45
- Day-trippers 43



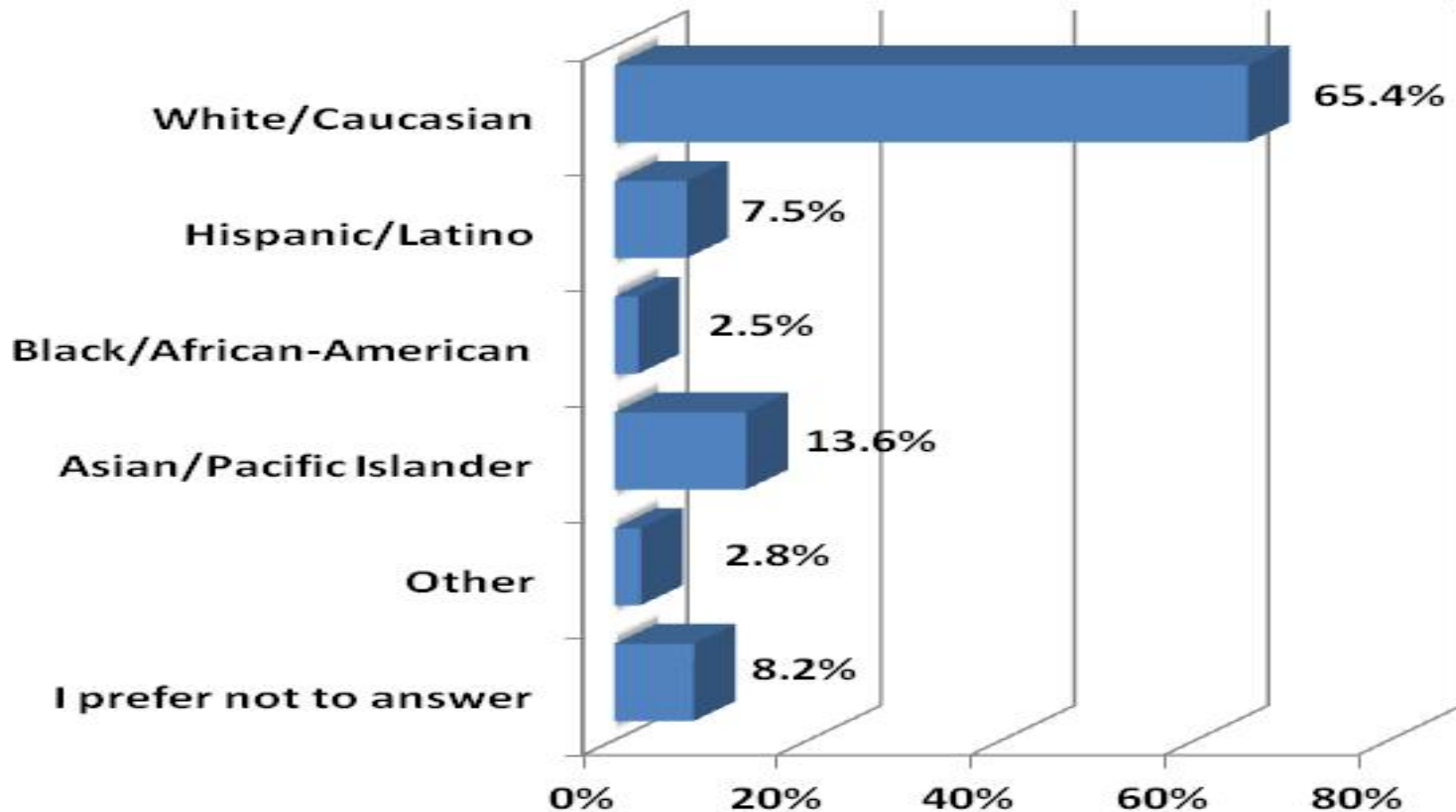
# Average Annual Household Income

- Half above \$100,000
- Lodging Guest earn \$195,000
- Day-trippers earn \$154,000
- VFRs earn \$145,000



# Ethnicity

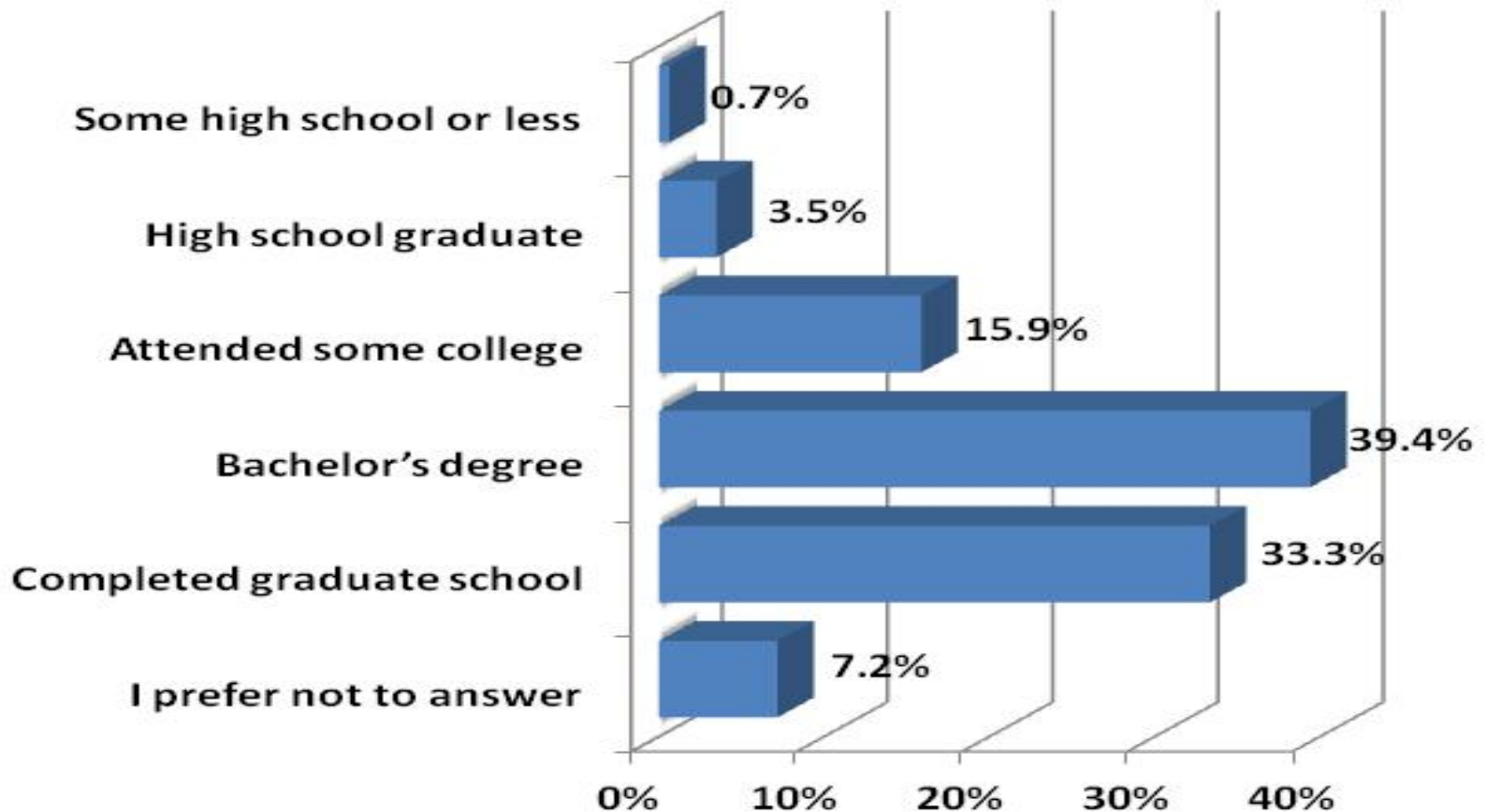
- 2/3 visitors Caucasian (65.4%).
- Day-trip: 1/3 other than Caucasian (34.3% versus 11.8% of lodging guests and 10.8% of VFRs).





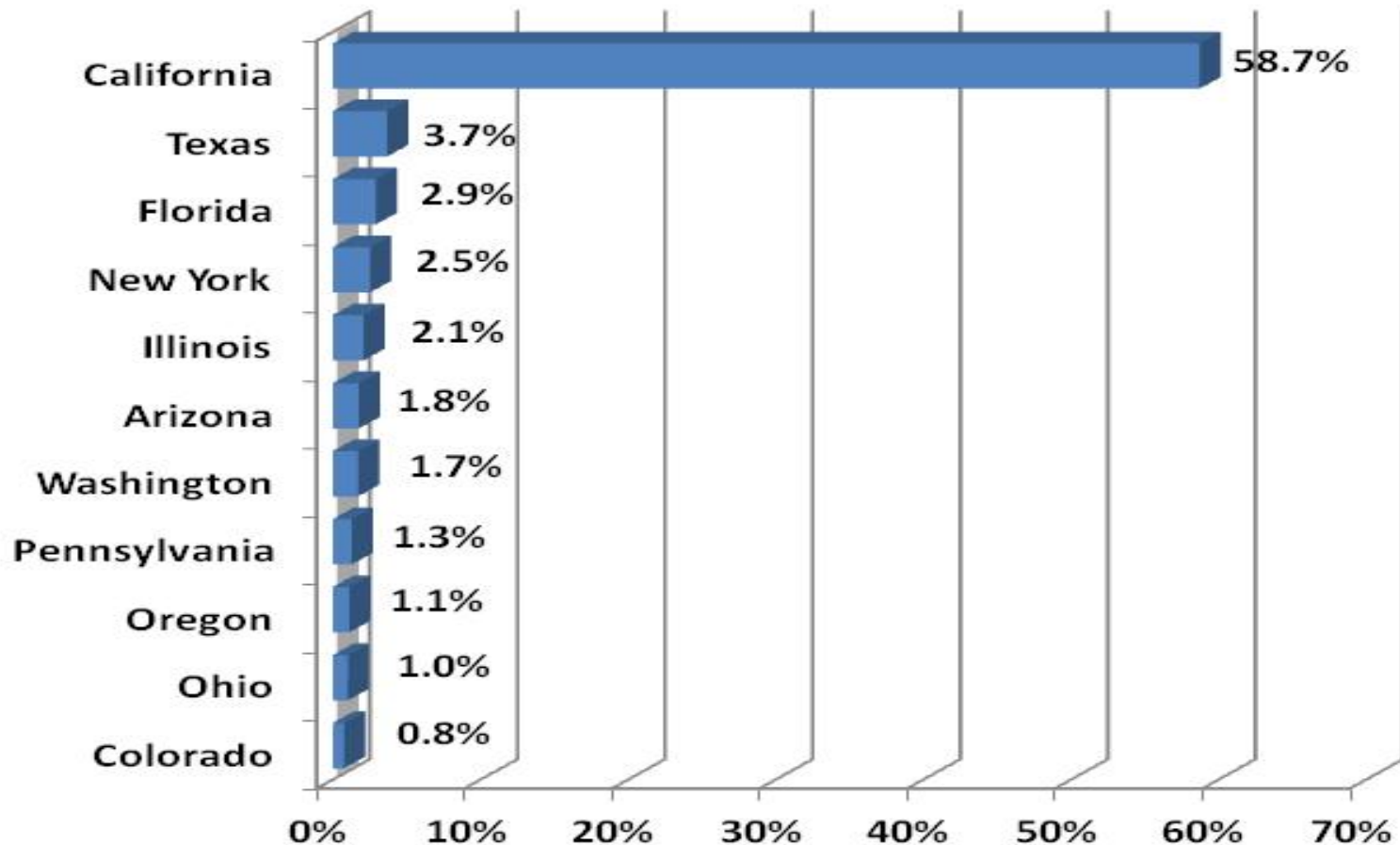
# Education

- Commensurate with their income, visitors well educated
- 3/4 bachelor's degree including 1/3 graduate degree



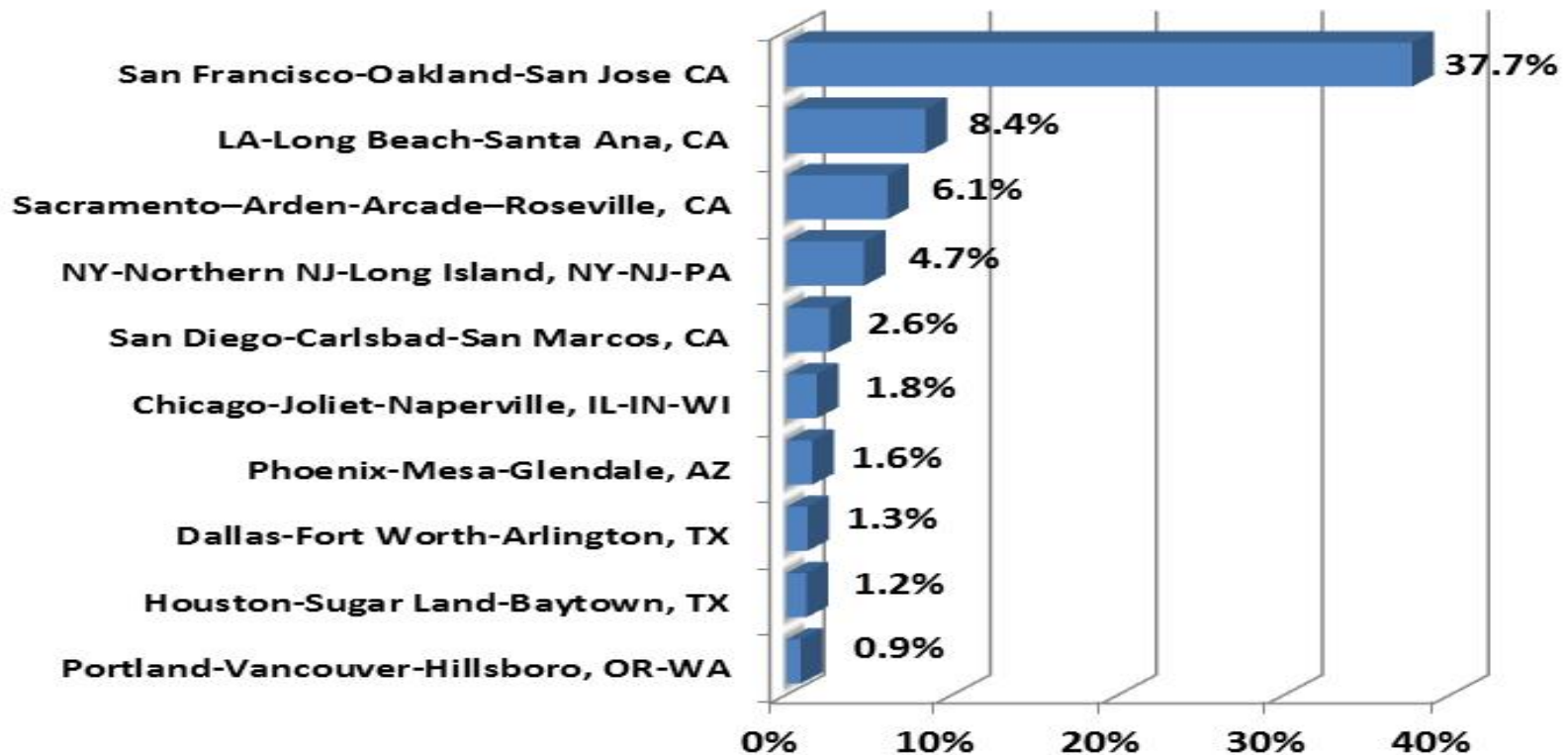
# Point of Origin: State

- 60 % domestic visitors from California.
- 3.7 % Texas, 2.9 % Florida, 2.5 % New York, 2.1 % Illinois



# Point of Origin: MSA

- 37.7 % San Francisco-Oakland-San Jose metropolitan statistical area (MSA)
- 8.4 % Los Angeles-Long Beach-Santa Ana MSA
- 6.1 % Sacramento-Arden-Arcade-Roseville MSA



# **Napa Valley Visitor Profile – Brief Summary**

- **Highly Educated**
- **Affluent**
- **Visiting Primarily from California and other Key Wine Markets (Texas, Florida, New York and Illinois)**
- **Visit Four-plus Wineries per Visit**
- **Wine/Wine Tasting/Wineries are Driving Reasons for Visitation**
- **Over 90% of Visitors are Very Likely or Likely to Return!**



# **Visit Napa Valley**

## **2012 Visitor Industry**

### **Economic Impact Overview**

April 2013

# 2012 Visitor Industry Performance

- **Industry size (Total direct visitor spending)**
- **Employment effects (Jobs supported & payroll)**
- **Fiscal impact (Tax revenues generated)**

# Methodology – Data Sources

## Proprietary data

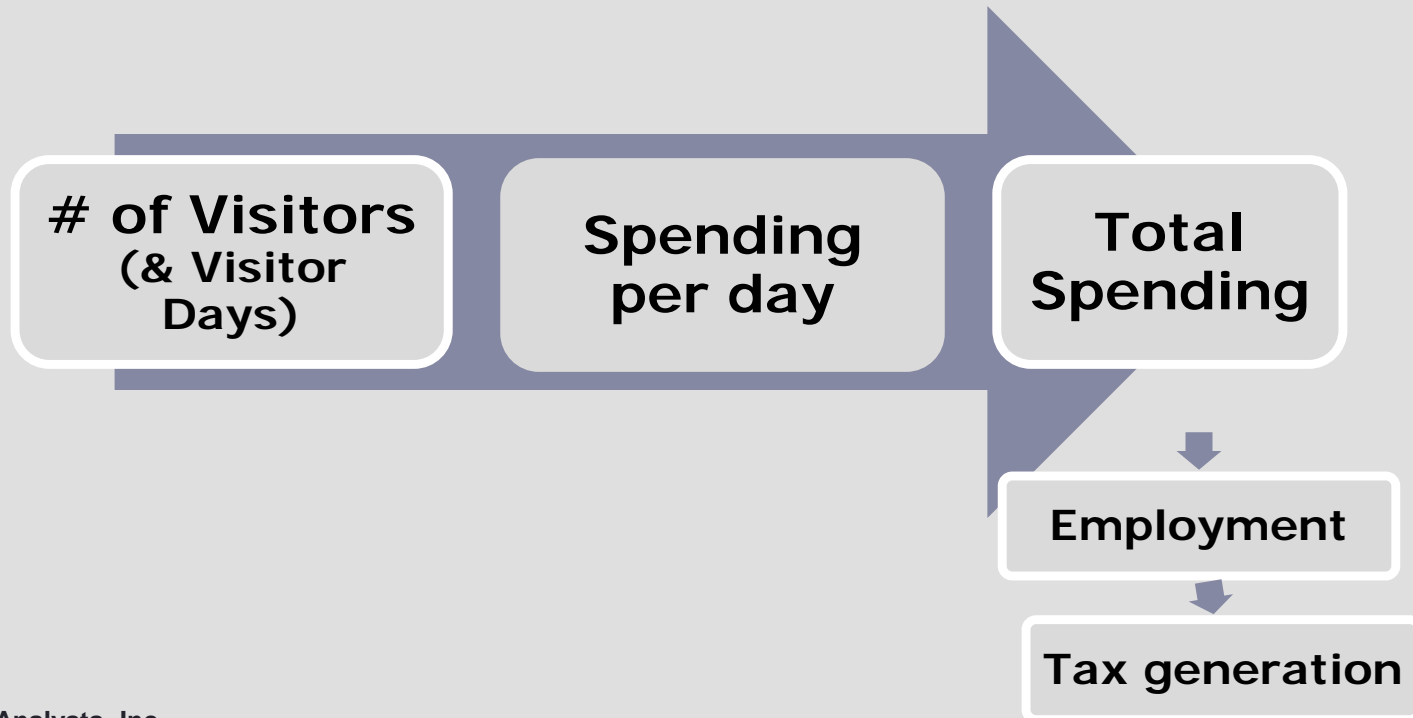
- Napa Valley Lodging Survey
- Visitor Intercept Survey
- Telephone Survey of Napa homes
- Survey of Napa Hoteliers
- Survey of Napa Meeting Planners

## Secondary data sources

- State of California
- Bureau of the Census, Dept. of Labor
- Hotel occupancy data
- County tax collections

# For each segment

(Napa lodging facilities, Napa private home, Day trip visitation)

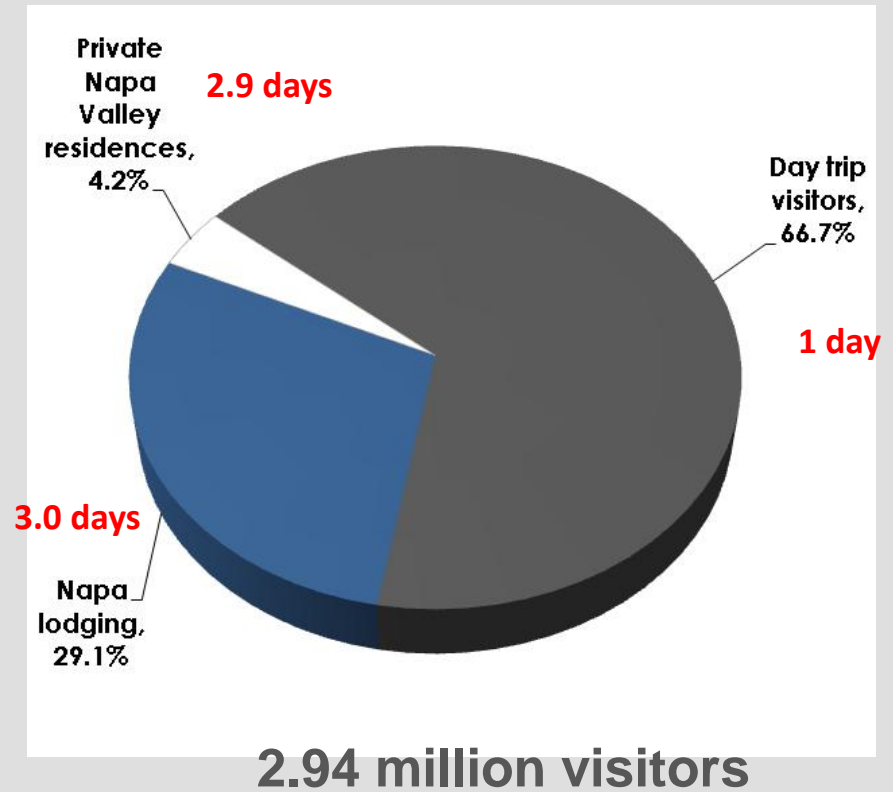




# VISITOR VOLUME, 2012 (In Millions)

## Visitors to Napa (thousands)

Napa lodging	857
Private Napa residences	125
Day trip visitors	1,962
<b>Total</b>	<b>2,944</b>

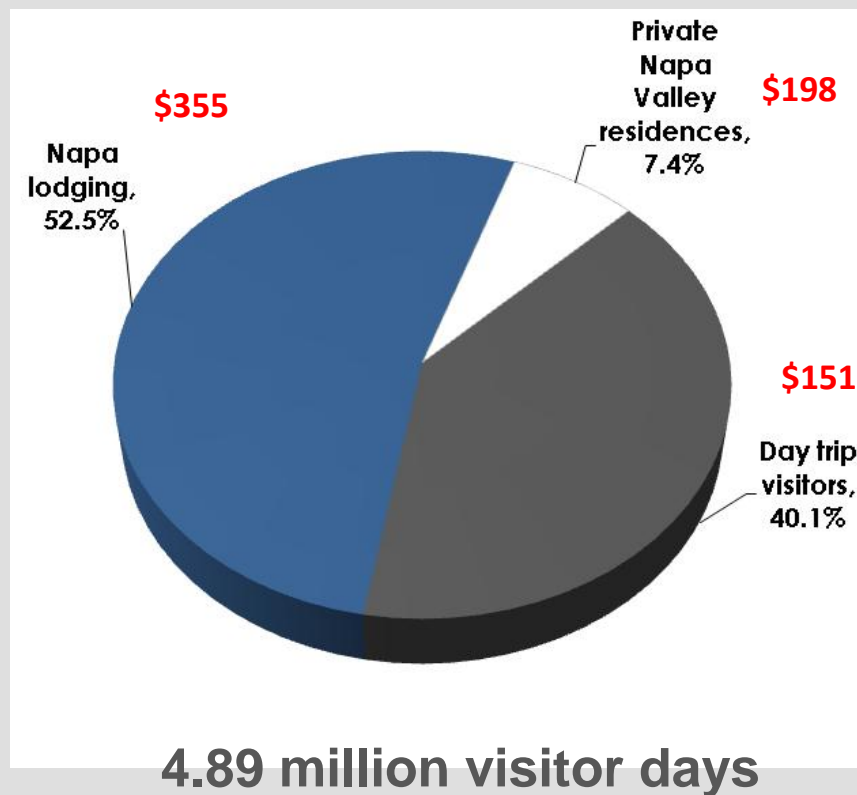


# VISITOR DAYS IN NAPA, 2012

(In Millions)

## Visitor Days Spent in Napa (thousands)

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

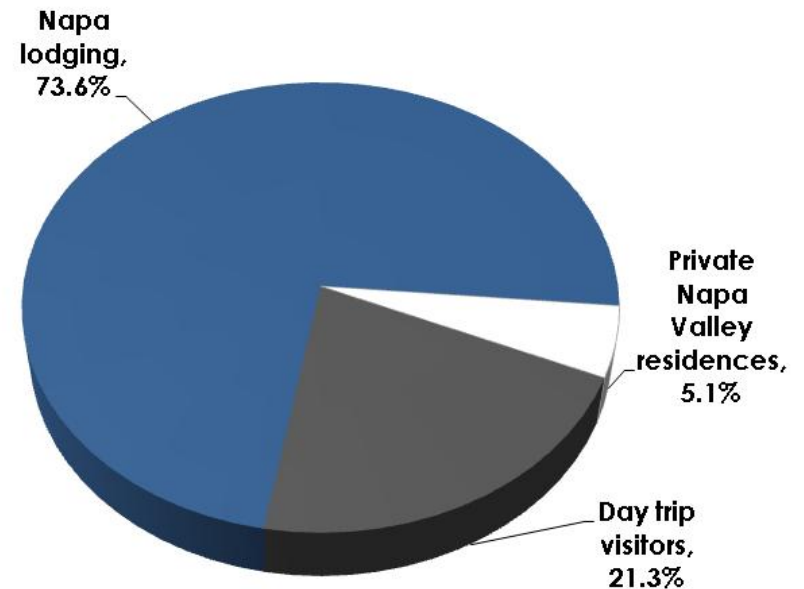


# DIRECT VISITOR SPENDING BY TYPE, 2012

(In Thousands)

## Direct Visitor Spending in Napa (thousands)

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



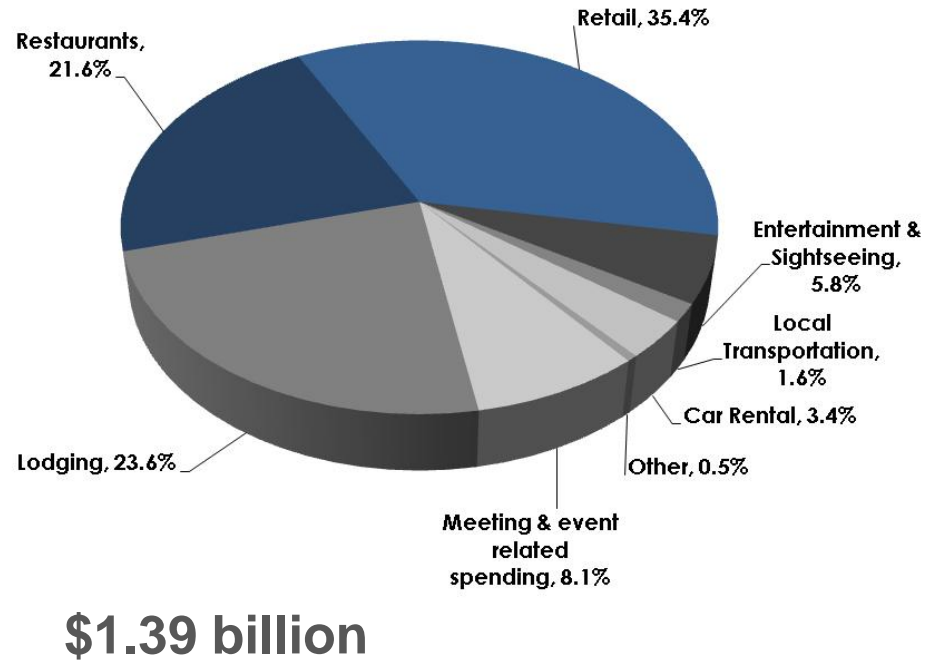
**\$1.39 billion**

# 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
<b>TOTAL SPENDING</b>	<b>\$1,394,185</b>



# Jobs & Fiscal Impact, 2012

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

# In Perspective

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



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Thank you!

