



# THE NAPA VALLEY VISITOR PROFILE 2018

FINAL REPORT OF FINDINGS  
MAY 2019

*RESEARCH PREPARED FOR VISIT NAPA VALLEY BY*

Destination  Analysts



# Research Overview

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This report presents the findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit Napa Valley. The data presented here comes from three sources:

- The Napa Valley Lodging Guest Survey.
- The Napa Valley Visitor Intercept Survey of day-trip visitors and visiting friends or relatives staying overnight in private homes (VFRs).
- Online Panel Survey & Telephone Survey of Napa County Homes conducted at the end of 2018 to quantify the number of VFRs who stayed overnight in a private home in the area.

This survey was administered to 300 randomly selected homes in the Napa County

The data collected in these surveys was used to estimate the actual volume of lodging guests and visiting friends and relatives (VFRs) who come to the Napa Valley during the year. The third segment of visitors, day-trip visitors, was estimated using the relative incidence of lodging guests to day-trip visitors seen in the data collected in the Visitor Intercept Survey. Using the visitor volume estimates that emerged from this process, the survey data was weighted to develop the overall visitor profile.



*Destination Analysts' research staff member interviewing visitors at Robert Mondavi*



# Research Objectives

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The overarching goal of this survey-based research is to create an in-depth profile of the Napa Valley visitor, including developing the following marketing intelligence:

- Detailed trip characteristics (i.e. tripographic information like the reason for visiting the Napa Valley, length of stay, place of stay, etc.)
- Activities & attractions visited in the Napa Valley
- Evaluation of the Napa Valley brand attributes
- The detailed Napa Valley visitor spending estimates
- Travel planning resources used by the Napa Valley visitors
- Visitor expectations and satisfaction
- Visitor psychographic and demographic profiling

In addition to developing a comprehensive, multi-segment Napa Valley visitor profile, data from this research will also be used as inputs to estimate the economic impact of tourism to the Napa Valley.



*Destination Analysts' research staff member interviewing visitors at Castello di Amorosa*



# Methodology

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The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with Visit Napa Valley, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to the Napa Valley collected at locations around the area each quarter (the intercept survey was in the field for a total of 30 days), and (2) a self-administered survey of the Napa Valley hotel guests distributed at their hotel.

This report presents data collected through December 2018 of this year-long study, from both the Visitor Intercept Survey as well as the Hotel Guest Survey. In total, **1,868** completed surveys were collected from four different key groups of visitors:

1. Visitors staying in a hotel/lodging property in the Napa Valley area (“Lodging Guest” – 536 surveys collected)
2. Visitors staying in a vacation home/room rental, i.e. rented through Airbnb (“Home Share” – 42 surveys collected)
3. Visitors staying in the private home of a friend or relative in the Napa Valley (“VFR” – 83 surveys collected)
4. Day-trippers to the Napa Valley, including regional residents coming to the area for the day as well as those on trips staying overnight elsewhere in the surrounding areas (“Day Trip” – 1204 surveys collected)



# Visitor Intercept Survey Overview

Destination Analysts' survey collection team worked at locations around the Napa Valley area to randomly select and interview visitors. During the 2018 calendar year the questionnaire was administered to persons residing outside the Napa Valley at the following locations:

- Beringer Vineyards
- Castello di Amorosa
- Clif Family Winery
- Chateau Montelena Winery
- The Culinary Institute of America
- Embassy Suites
- The Meritage Resort & Spa
- Napa Premium Outlets
- The Napa Valley Wine Train
- Robert Mondavi Winery
- Sterling Vineyards
- The Napa Valley Welcome Center
- V Marketplace
- V. Sattui Winery



*Images of Destination Analysts' research staff member interviewing visitors at V. Sattui and the Napa Valley Wine Train.*



# Lodging Guest Survey Overview

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The self-administered printed Lodging Guest Survey was distributed at various lodging properties throughout the Napa Valley. Guests were asked to complete the survey and drop it in the mail at their convenience (via pre-paid business reply postage). The following Napa Valley properties distributed the Lodging Guest Survey:

## AMERICAN CANYON

- DoubleTree by Hilton Hotel & Spa
- Fairfield Inn & Suites
- Holiday Inn Express & Suites

## CALISTOGA

- Brannan Cottage Inn
- Calistoga Motor Lodge & Spa
- Chateau de Vie
- Indian Springs Calistoga

## NAPA

- Andaz Napa
- ARCHER Napa
- Embassy Suites Napa Valley
- Hotel Indigo Napa
- Napa River Inn
- Napa Valley Marriott Hotel & Spa
- Napa Winery Inn
- River Terrace Inn
- SENZA Hotel
- Silverado Resort and Spa
- The Meritage Resort and Spa
- The Westin Verasa Napa

## RUTHERFORD

- Auberge du Soleil

## ST. HELENA

- Harvest Inn
- Las Alcobas
- Southbridge Napa Valley

## YOUNTVILLE

- Napa Valley Lodge
- North Block Hotel





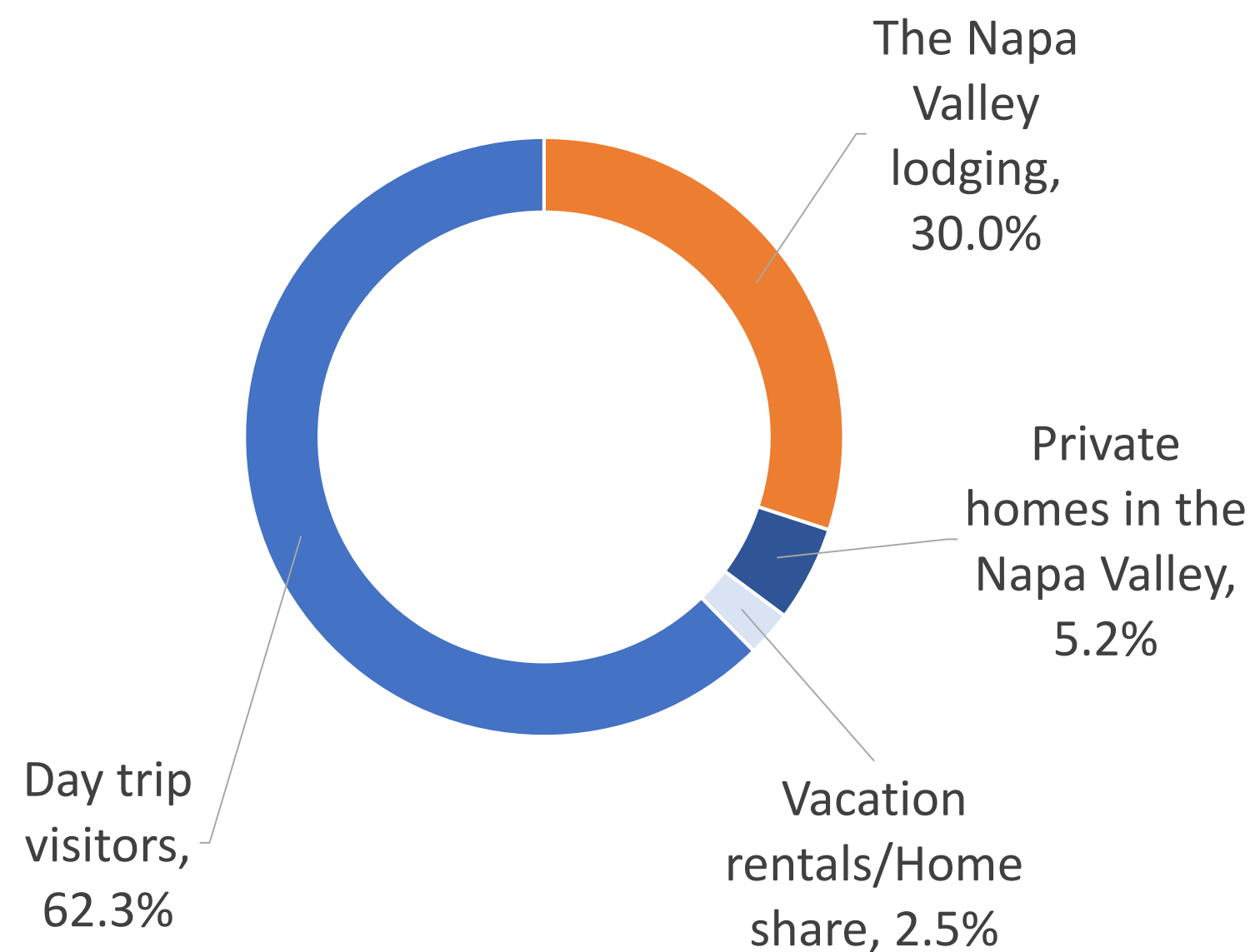
# 2018 VISITOR VOLUME ESTIMATES



# Visitor Volume, 2018

The results presented in this report are weighted based on estimated visitor volume to Napa during the year. The chart and table (below) show the number of visitors in each of the four segments that the county hosted in 2018. **In total, the county hosted 3.8 million visitors in 2018, up from 3.5 million in 2016.** Day trippers accounted for the largest proportion of the Napa Valley visitors at 62.3 percent (down slightly compared to 2016 at 64.5%). Meanwhile, lodging guests made up 30.0 percent of the county’s visitor volume, up from 28.6 percent in 2016.

**Visitor Volume Proportions by Visitor Segment**



**Visitor Volume (Total Annual) by Visitor Segment**

Visitor Segment (by place of stay)	# of Visitors
Lodging properties	1,156,749
Private homes	198,701
Vacation rentals	95,926
Day trippers	2,400,960
<b>TOTAL VISITORS</b>	<b>3,852,336</b>





# INFOGRAPHIC SUMMARY OF THE NAPA VALLEY VISITOR

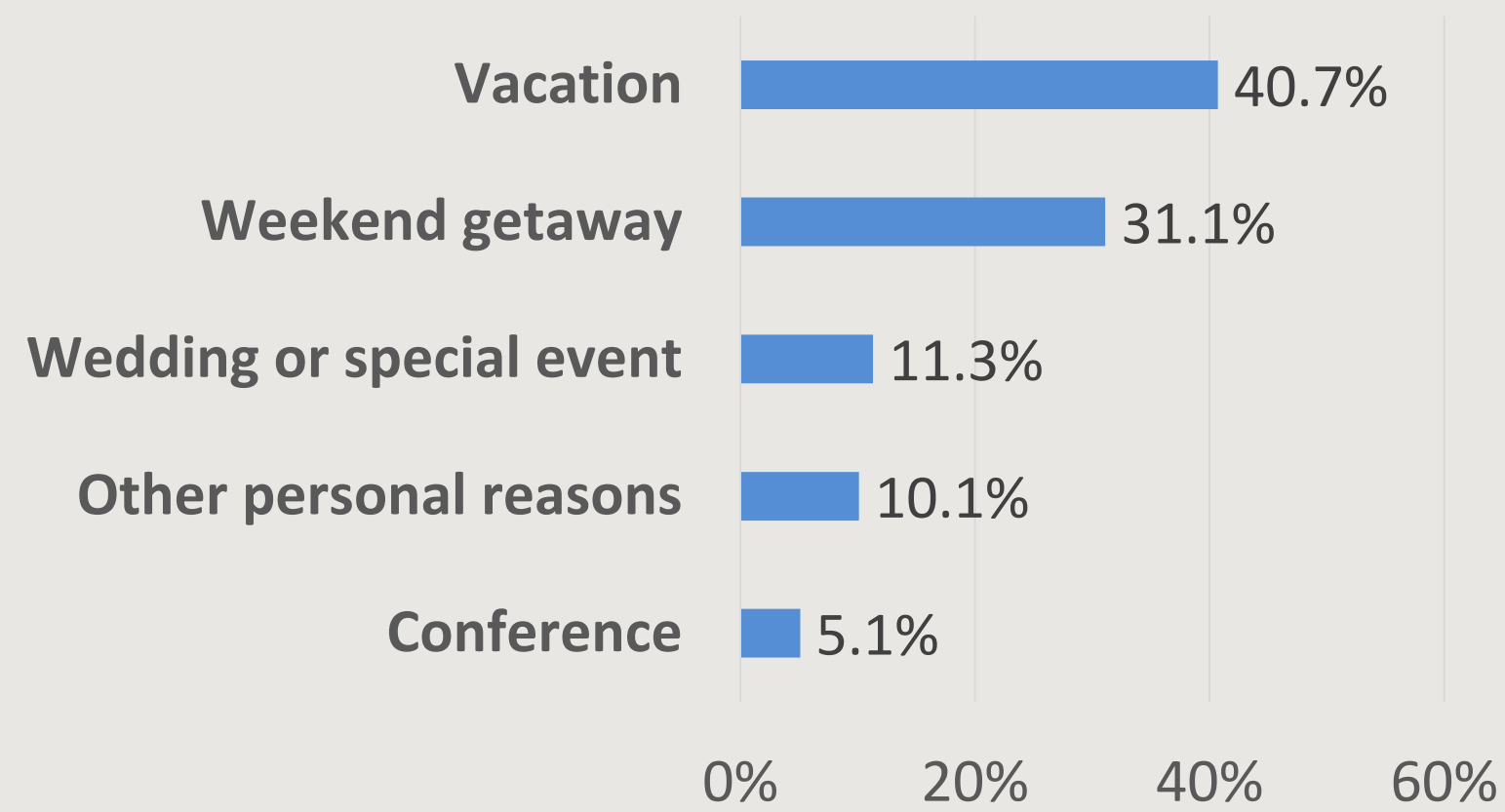


# THE NAPA VALLEY VISITOR PROFILE 2018

Visit Napa Valley – The Napa Valley Visitor Profile 2018– Final Report of Findings (March 2019)

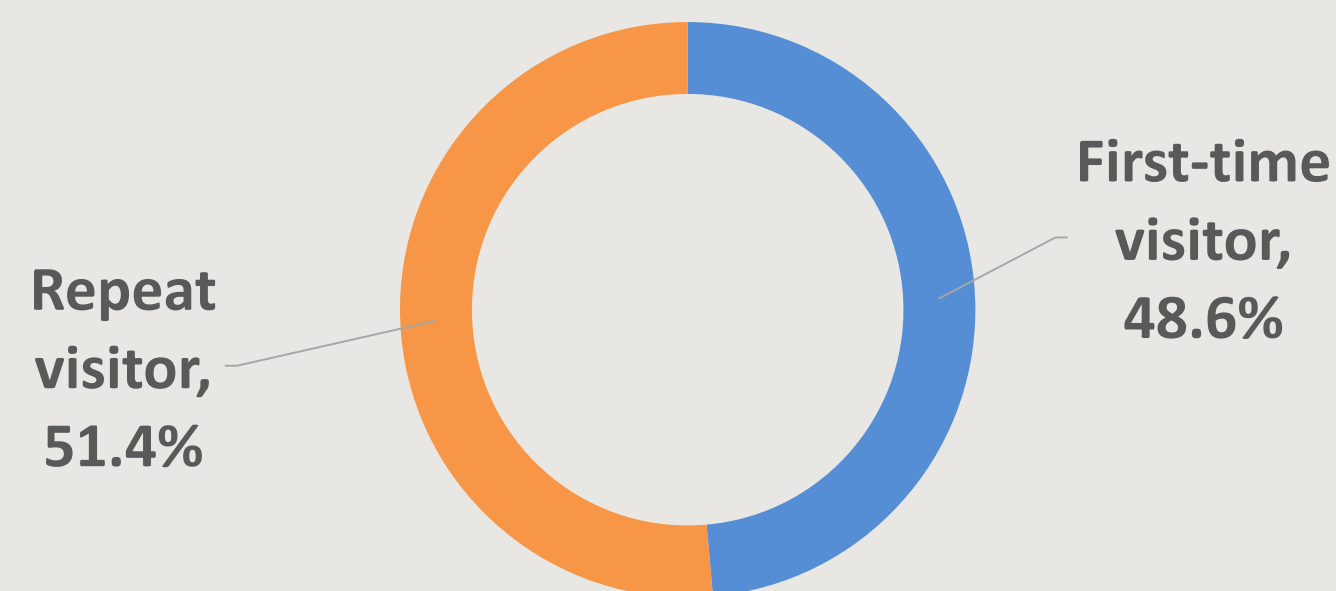
## Top Reasons for Visiting

(Base: All respondents. See page 17 for full detail)



## Past Visitation

(Base: All respondents. See page 37 for full detail)



## Top Activities

(Base: All respondents. See page 25 for full detail)



## Key Trip Details

(Base: All respondents. See pages 31, 29 and 32 for full detail)



## Domestic vs. International Visitors

(Base: All respondents. See page 55 for full detail)



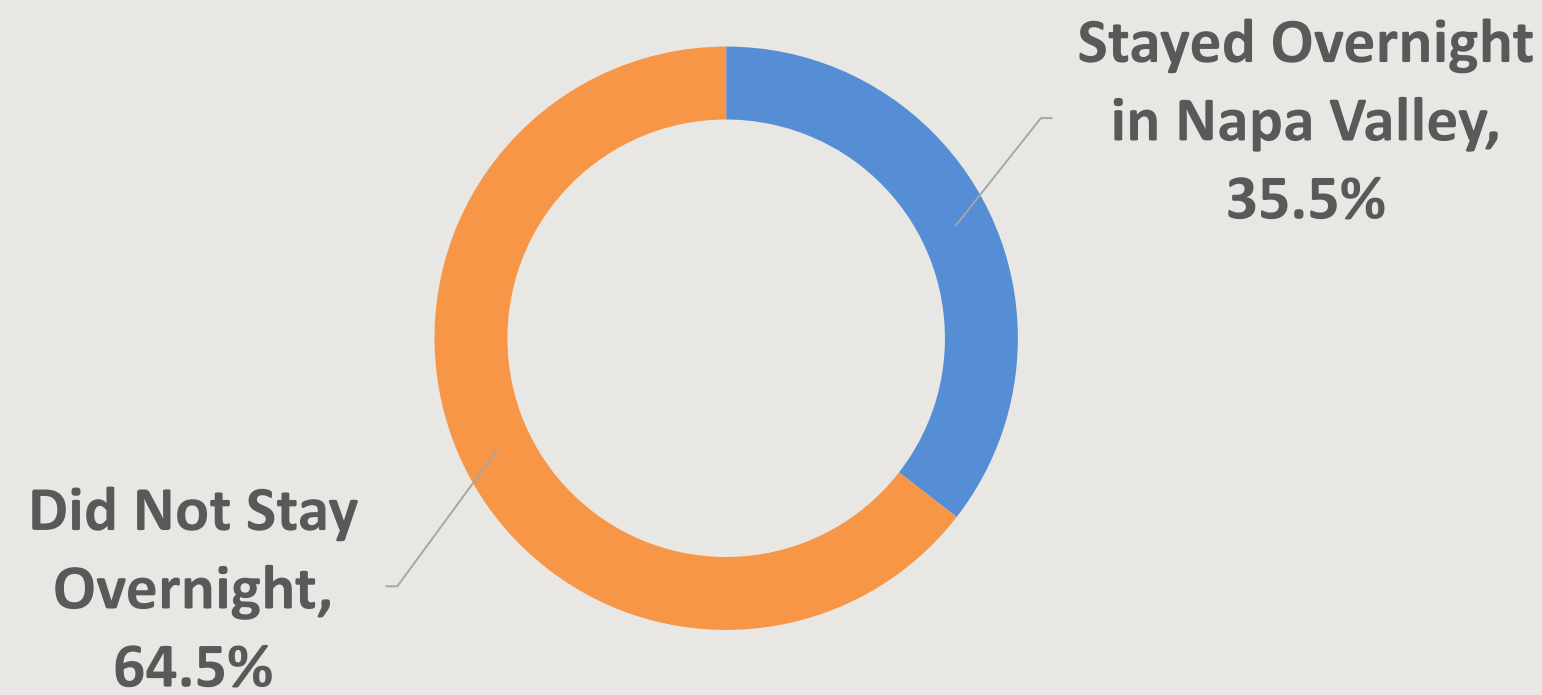


# THE NAPA VALLEY VISITOR PROFILE 2018

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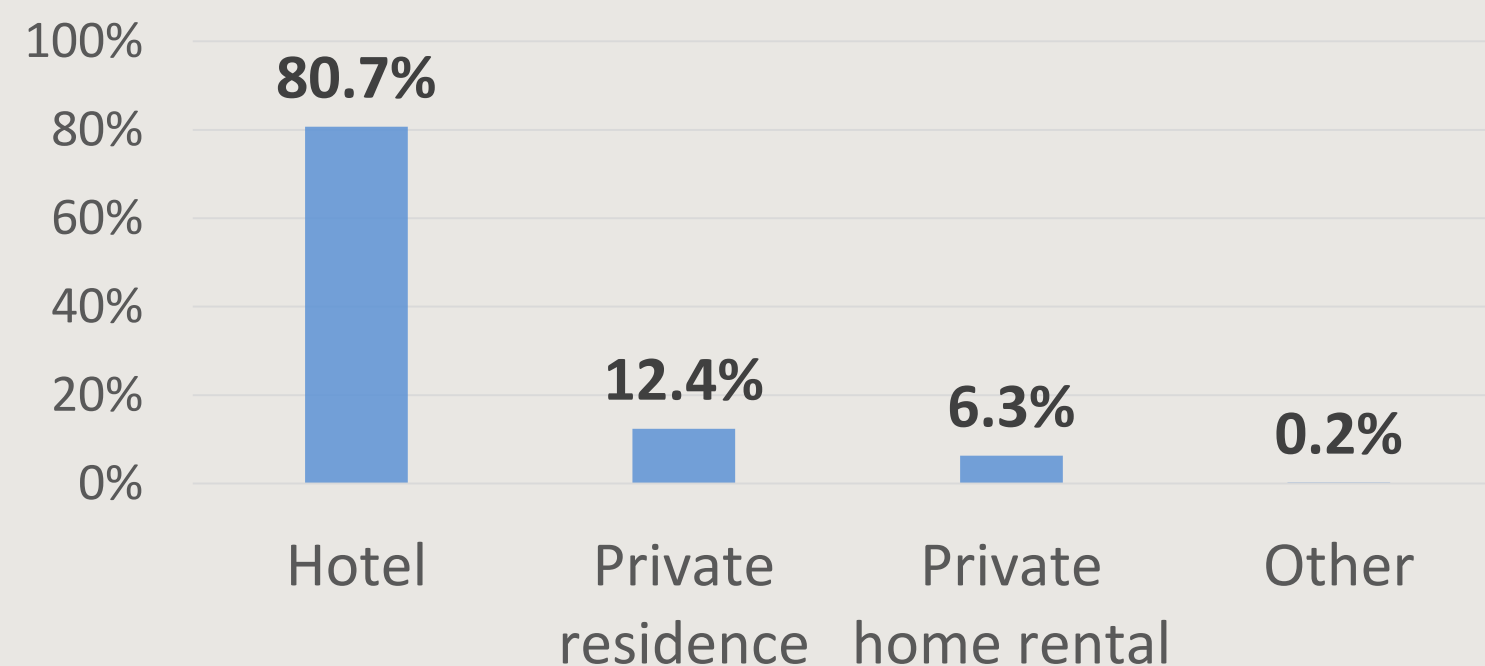
## Overnight Stay in the Napa Valley

(Base: All respondents. See page 18 for full detail)



## Place of Stay in the Napa Valley

(Base: Overnight Visitors. See page 20 for full detail)



## Number of Wineries/Tasting Rooms Visited

(Base: All respondents. See page 27 for full detail)



**Wineries Visited**  
(on Average)



**Stand-Alone Tasting Rooms Visited**  
(on Average)

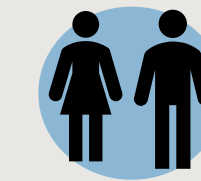
## Most Liked Aspects of the Napa Valley

(Base: All respondents. See page 35 for full detail)



## Respondent Demographics

(Base: All respondents. See pages 47 - 53 for full detail)



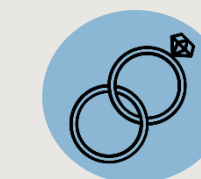
Female — 51.3%  
Male — 43.3%



Graduate school — 29.0%  
Bachelor's degree — 43.0%



Caucasian — 49.8%  
Asian, Pacific Islander — 25.7%  
Latino/Hispanic — 9.8%  
Black/African-American — 4.1%



Single — 28.6%  
Married/Partnered — 58.4%



Mean age — 46.0



Mean household income — \$170,595



Heterosexual — 93.1%  
LGBTQ — 4.1%





# PROFILE OF THE NAPA VALLEY VISITOR SEGMENTS

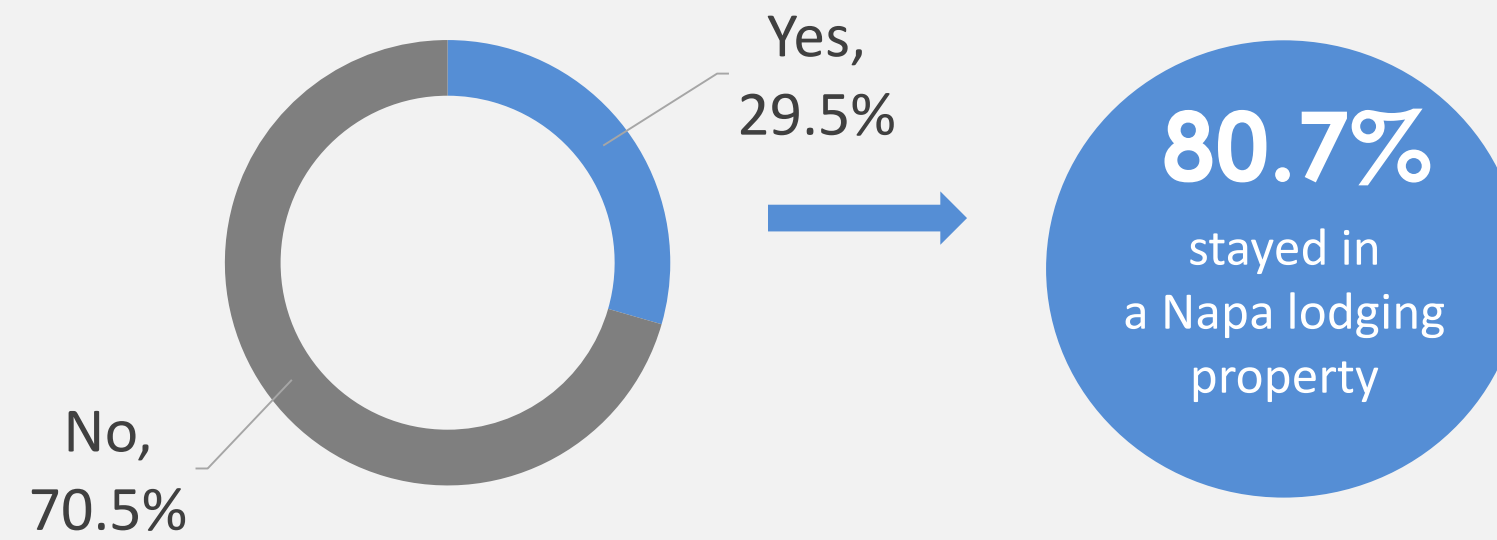




# THE INTERNATIONAL VISITOR

Results presented here are reflective of visitors who reside OUTSIDE the United States.

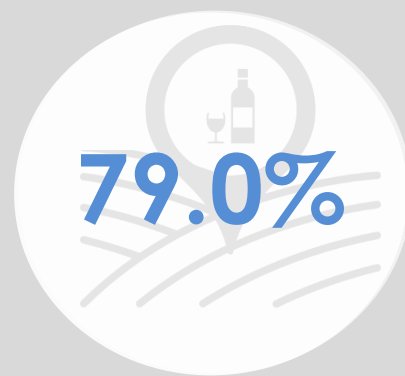
## Overnight Stay in the Napa Valley



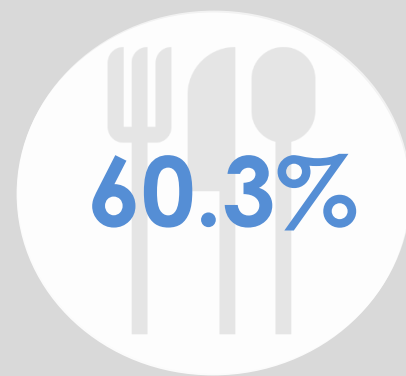
## Point of Origin: Top Countries

- |                     |                       |
|---------------------|-----------------------|
| 1. Canada (17.7%)   | 6. South Korea (4.3%) |
| 2. China (17.0%)    | 7. Mexico (4.0%)      |
| 3. UK (14.3%)       | 8. Holland (3.3%)     |
| 4. Japan (7.8%)     | 9. Germany (2.8%)     |
| 5. Australia (6.0%) | 10. Singapore (2.1%)  |

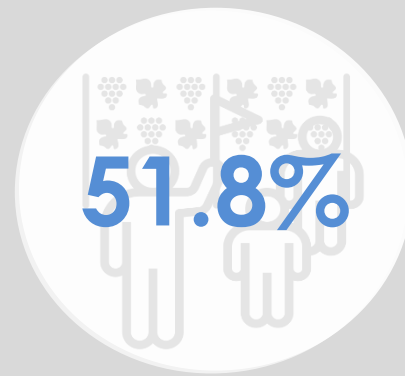
## Top Activities



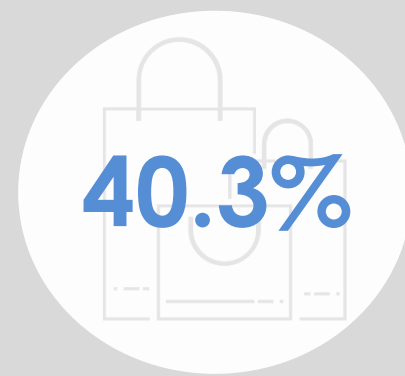
Wine Tasting (Wineries)



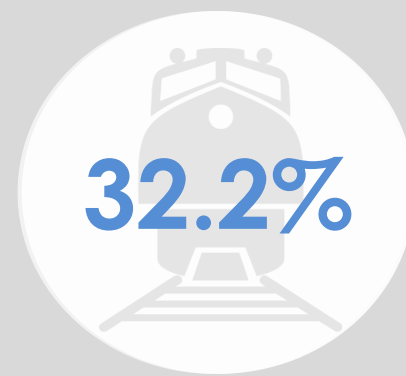
Dining in Restaurants



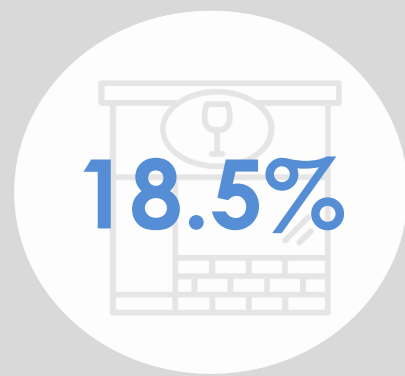
Winery Tours



Shopping

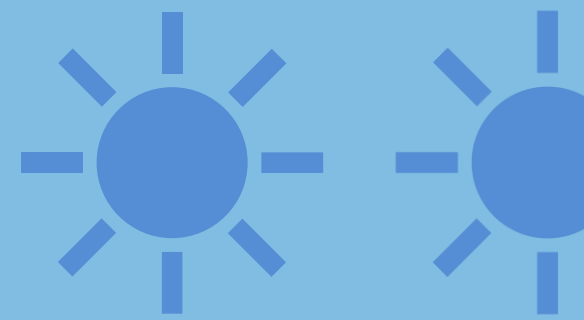


The Napa Valley Wine Train



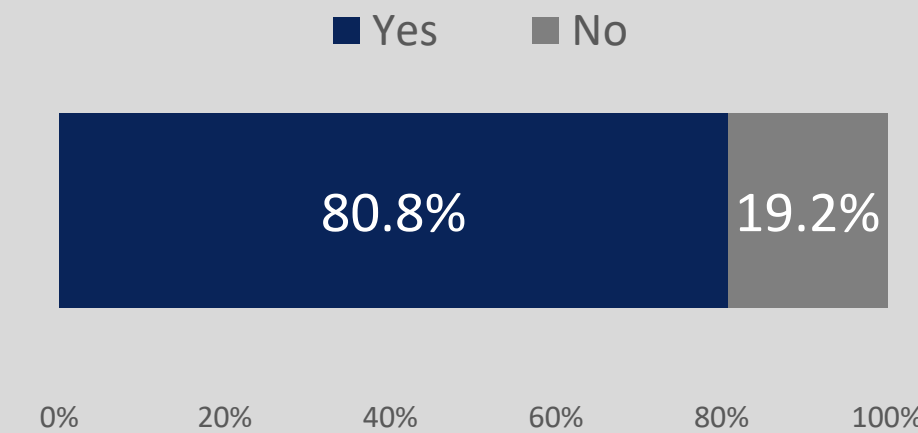
Wine Tasting (Stand-Alone)

## Length of Stay



1.7 Days (On Average)

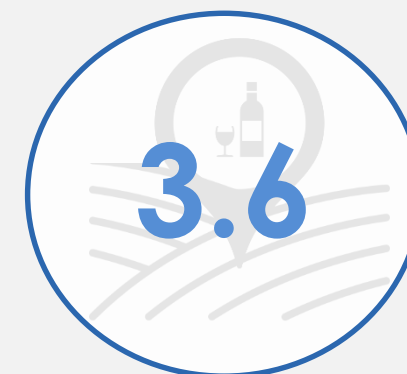
## First-Time Visitor



## Average Daily Spending

**\$162.25**  
Per Person

## Wineries/Tasting Rooms Visited



Wineries (on Average)



Stand-Alone Tasting Rooms (on Average)

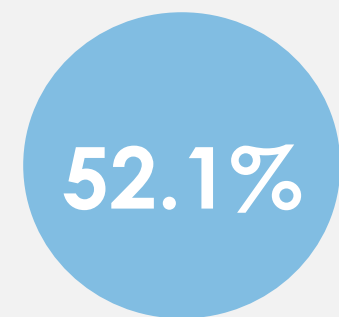
## Key Demographics



Average Age



Average Annual Household Income



Married





# THE LODGING GUEST VISITOR

Results presented here are reflective of visitors who stayed overnight in a Napa Valley area hotel, motel, inn or B&B during their trip.

## Accommodation Details



Mean daily lodging spend – **\$250.56**

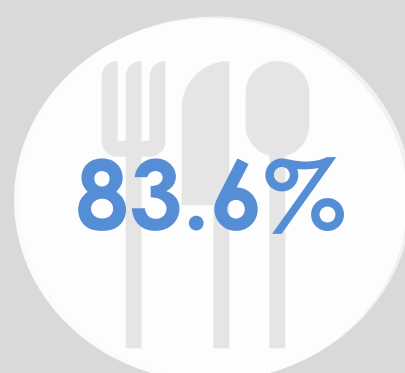


Mean # of people in hotel room – **2.4**

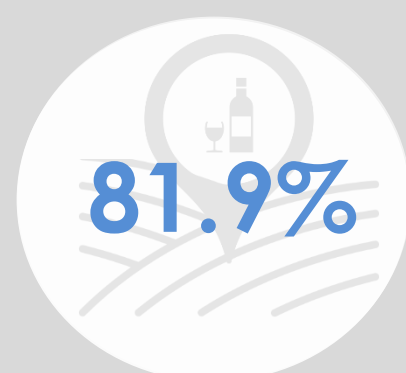
## Point of Origin: Top States

- |                       |                        |
|-----------------------|------------------------|
| 1. California (34.4%) | 6. Washington (3.0%)   |
| 2. Texas (6.8%)       | 7. Ohio (2.6%)         |
| 3. New York (6.1%)    | 8. New Jersey (2.6%)   |
| 4. Florida (5.7%)     | 9. Pennsylvania (2.4%) |
| 5. Illinois (4.0%)    | 10. Georgia (2.2%)     |

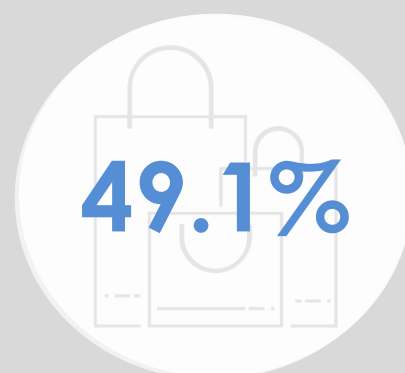
## Top Activities



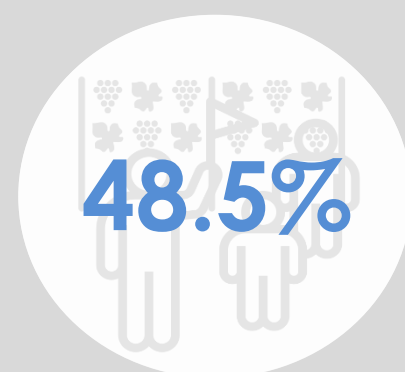
Dining in Restaurants



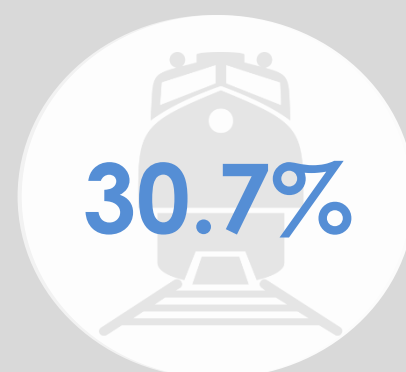
Wine Tasting (Wineries)



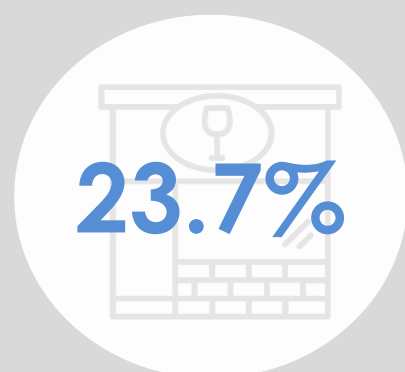
Shopping



Winery Tours

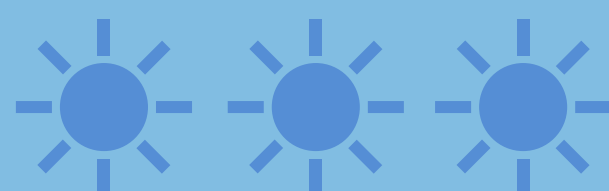


The Napa Valley Wine Train



Wine Tasting (Stand-Alone)

## Length of Stay



3.0 Days (On Average)

## Travel Party Size



**3.8**  
People

## Average Daily Spending

**\$405.28**  
Per Person

## Wineries/Tasting Rooms Visited

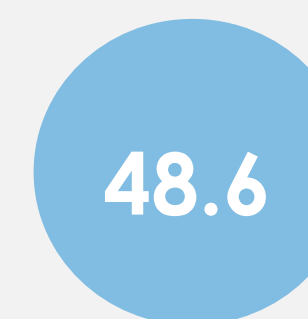


Wineries  
(on Average)



Stand-Alone Tasting Rooms  
(on Average)

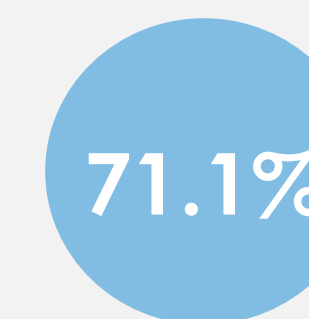
## Key Demographics



Average Age



Average Annual Household Income



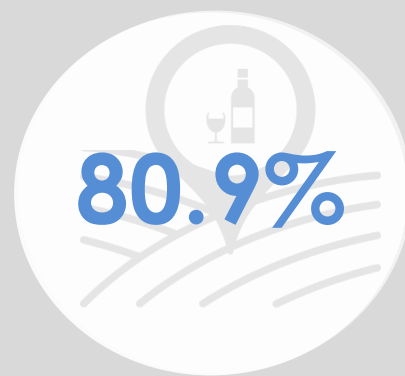
Married



# THE NON REGIONAL DAY TRIPPER

Results presented here are reflective of visitors who live outside the San Francisco Bay Area who came to the Napa Valley on a day trip (ex: Los Angeles resident on a trip to SF making a day trip to Napa).

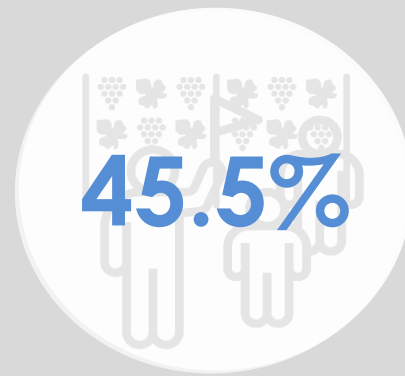
## Top Activities



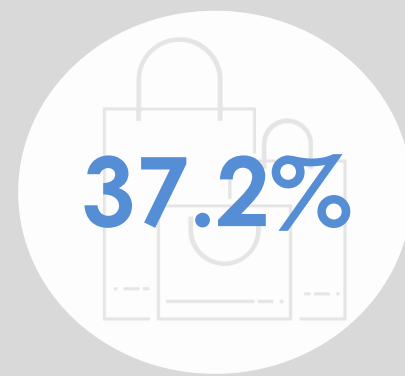
Wine Tasting (Wineries)



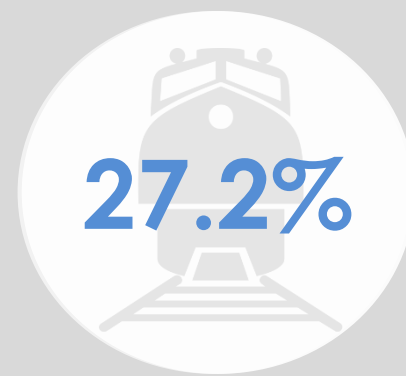
Dining in Restaurants



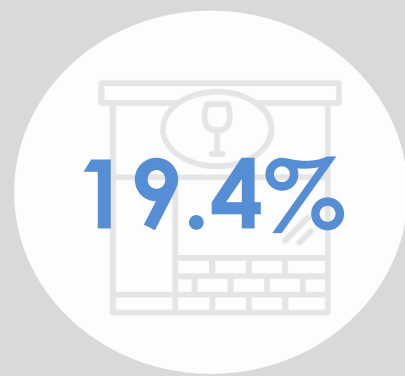
Winery Tours



Shopping

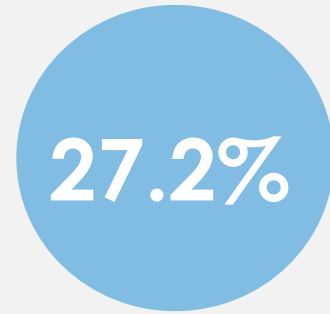


The Napa Valley Wine Train

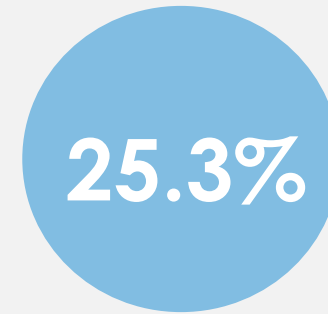


Wine Tasting (Stand-Alone)

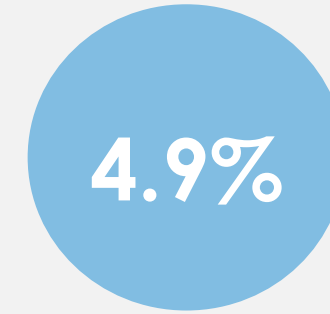
## Top Motivators to Stay Overnight in The Napa Valley on Future Trip



More Vacation Time



Affordability – Free Things

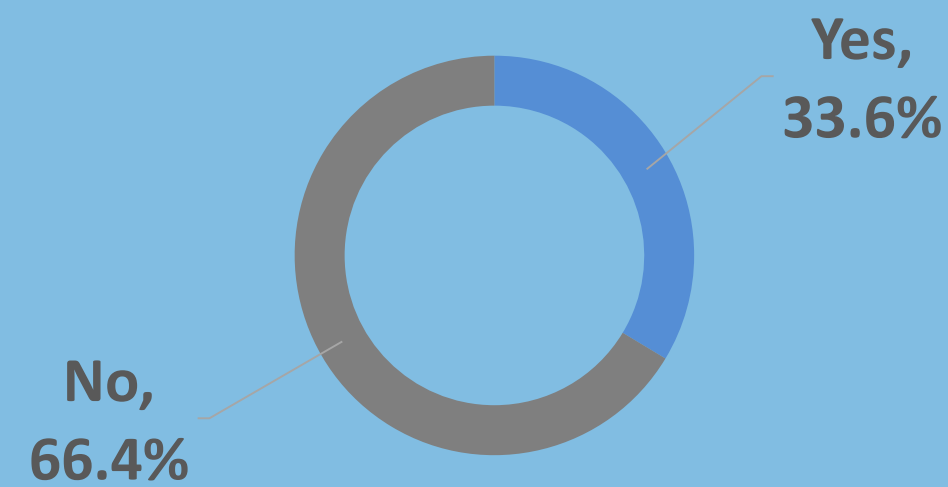


Special Event

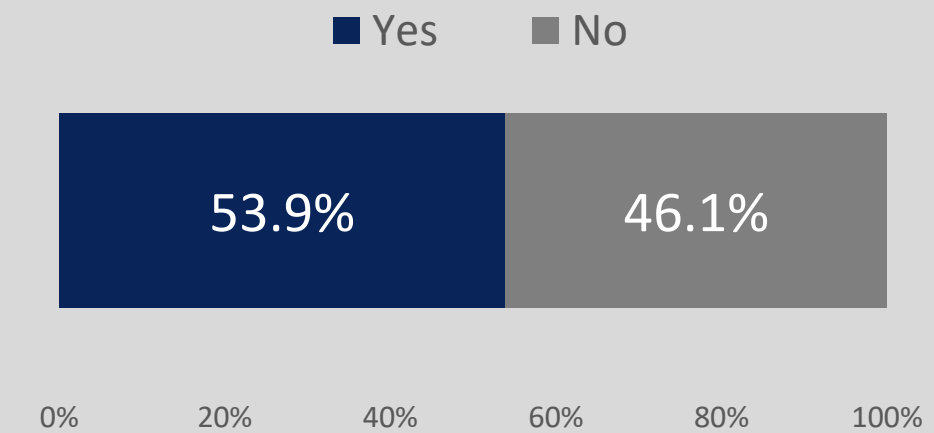
## Point of Origin: Top States

- |                       |                     |
|-----------------------|---------------------|
| 1. California (47.4%) | 6. New York (2.6%)  |
| 2. Texas (7.1%)       | 7. Ohio (2.1%)      |
| 3. Florida (4.2%)     | 8. Louisiana (2.1%) |
| 4. Illinois (4.0%)    | 9. Oregon (2.1%)    |
| 5. Georgia (3.5%)     | 10. Kansas (1.9%)   |

## Made Winery Reservations



## First-Time Visitor



## Average Daily Spending

**\$135.55**  
Per Person

## Wineries/Tasting Rooms Visited



Wineries (on Average)



Stand-Alone Tasting Rooms (on Average)

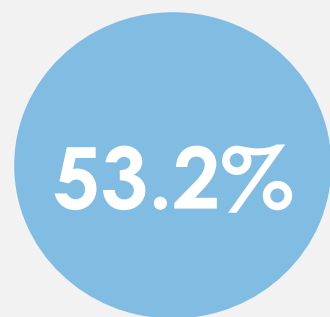
## Key Demographics



Average Age



Average Annual Household Income



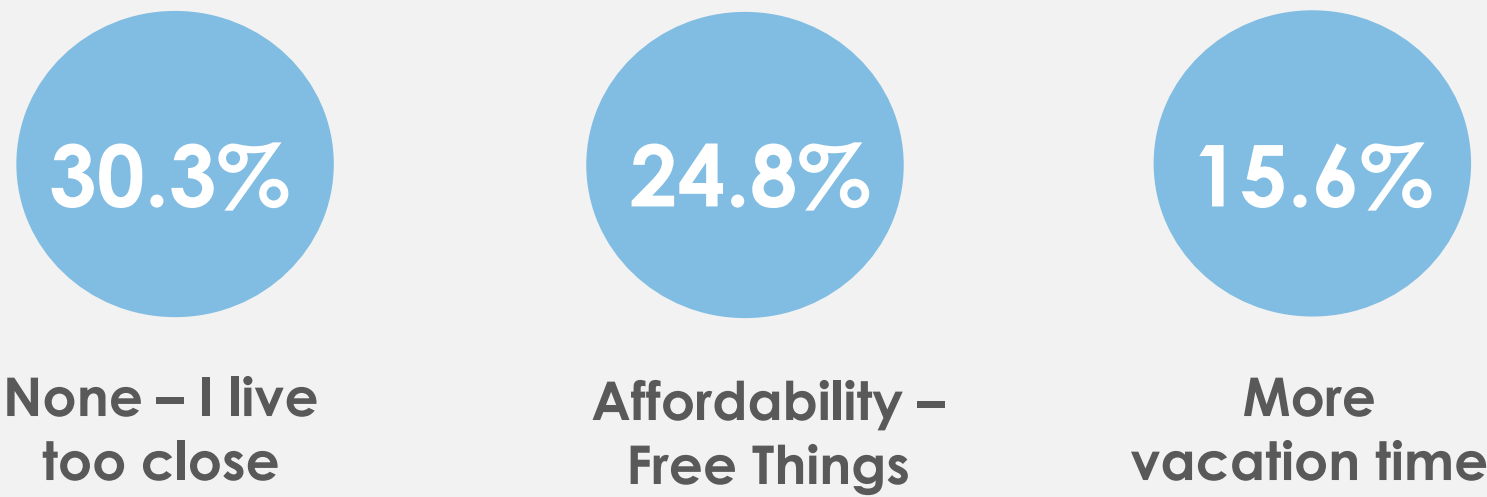
Married



# THE LEISURE REGIONAL DAY TRIPPER

Results presented here are reflective of visitors who live within the San Francisco Bay Area who came to the Napa Valley on a day trip for purely leisure reasons.

## Top Motivators to Stay Overnight in The Napa Valley on Future Trip



## Point of Origin: Top MSAs

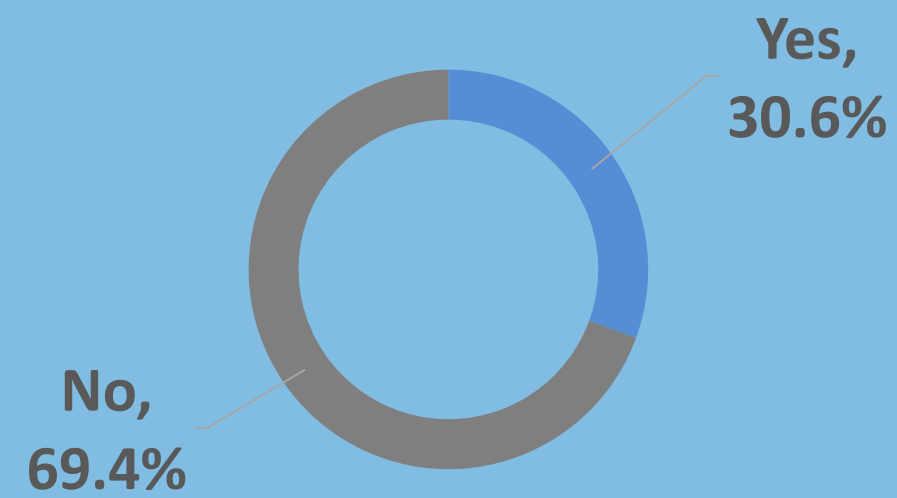
1. San Francisco-Oakland, CA (70.4%)
2. Vallejo-Fairfield, CA (12.2%)
3. San Jose, CA (11.3%)
4. Santa Rosa, CA (3.3%)
5. Sacramento, CA (1.4%)
6. Stockton-Lodi, CA (1.4%)



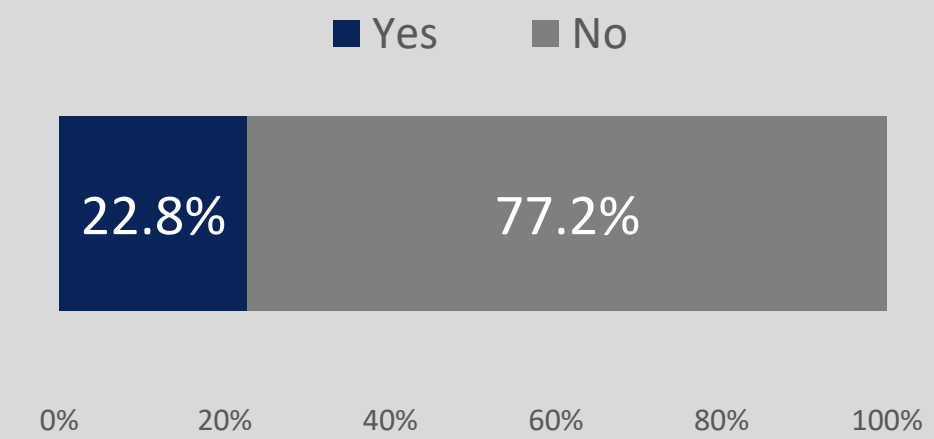
## Top Activities



## Made Winery Reservations



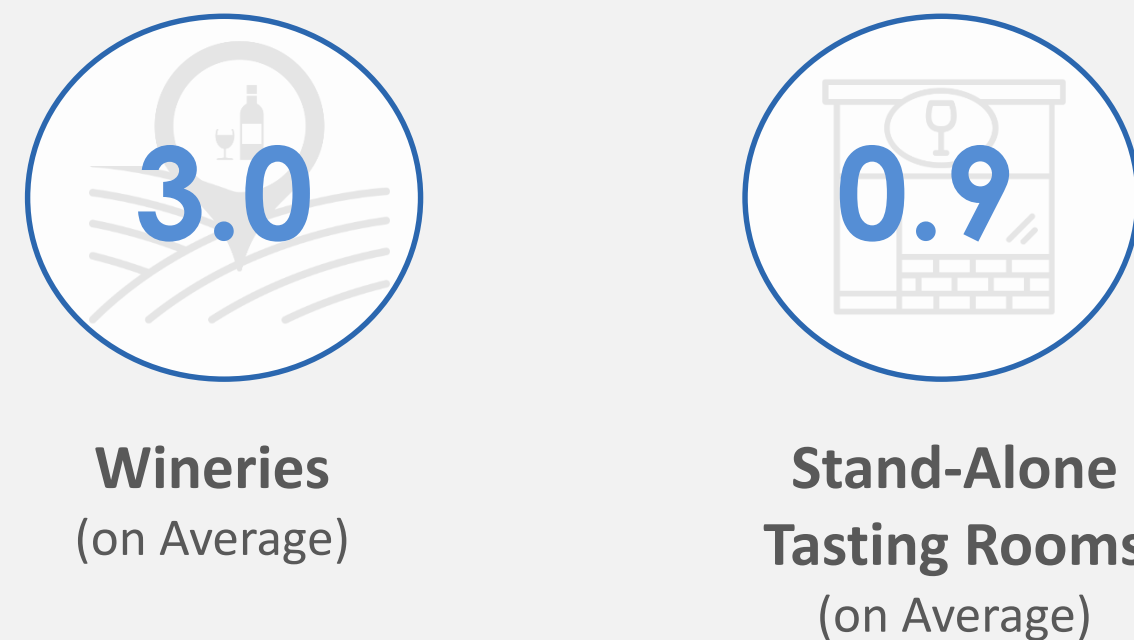
## First-Time Visitor



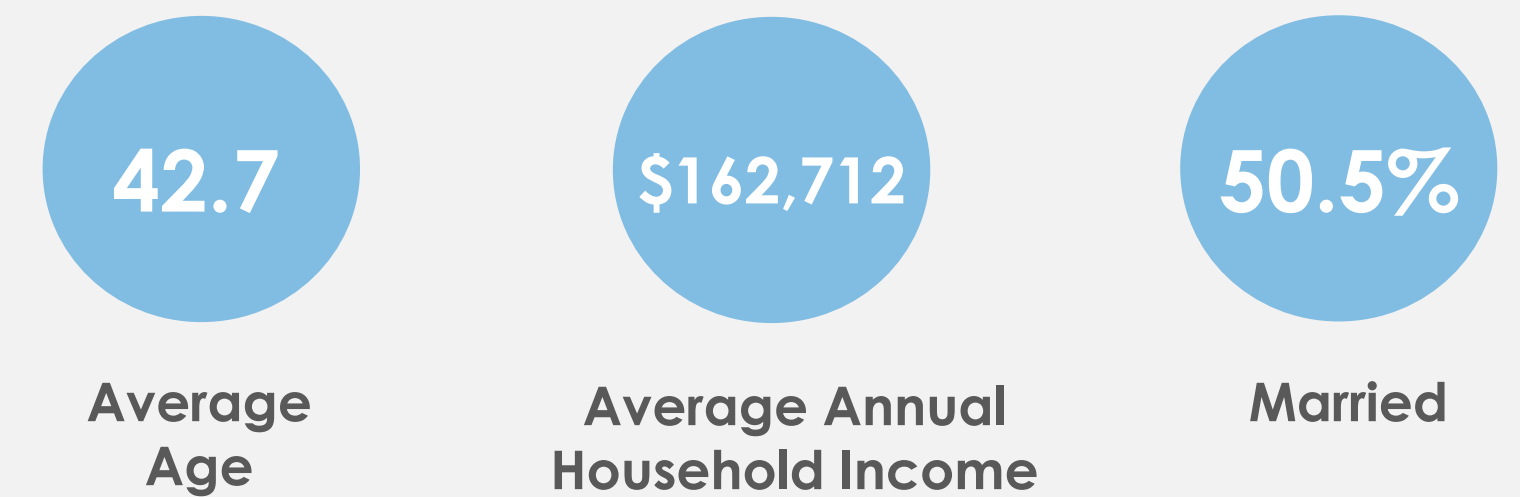
## Average Daily Spending

**\$115.93**  
Per Person

## Wineries/Tasting Rooms Visited



## Key Demographics







# DETAILED FINDINGS



# ABOUT THIS REPORT

**In the remainder of this report, data from the survey findings is presented as follows:**

Each slide in this report presents a chart illustrating the results for all visitors. The report additionally presents results for each of the four visitor segments:

- Lodging guests
- Home share rental visitors
- Visiting friends and relatives (VFRs)
- Day trip visitors

These results are presented in tabular format next to charts representing the data for all visitors.

## ***Key Definitions:***

**1. Travel Group** - Includes the number of people traveling together in the same group

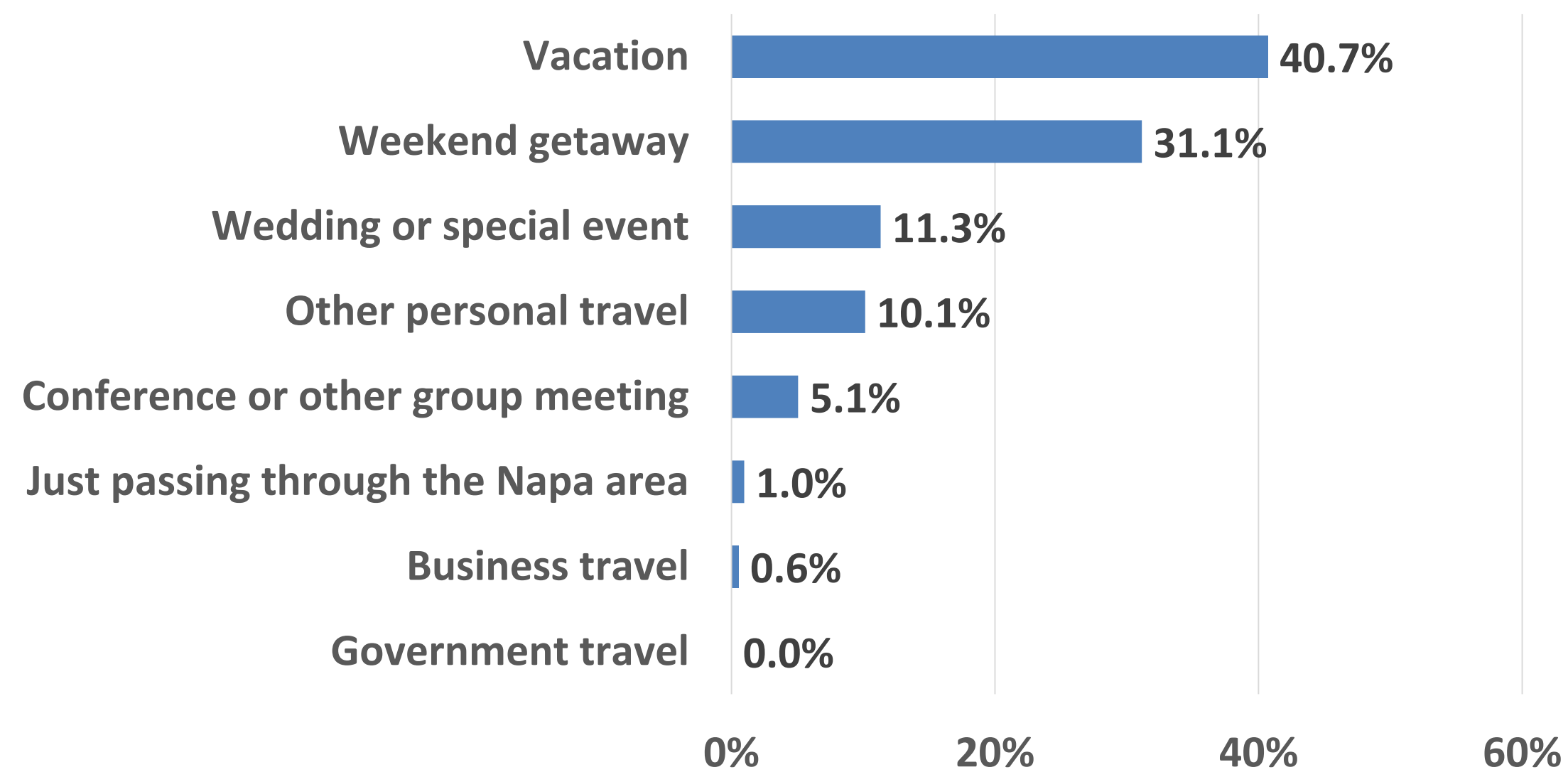
**2. Travel Party** – Number of people covered by reported in-market spending



# Primary Reason for Napa Valley Trip

**Visitors to the Napa Valley in 2018 came primarily for leisure.** In fact, 40.7 percent characterized their trip as a vacation while an additional 31.1 percent were in the Napa Valley for a weekend getaway. Meanwhile, 11.3 percent were in the area for a wedding or special event and 5.7 percent of visitors surveyed were in the Napa Valley for business or a conference/group meeting.

**Chart 1: Primary Reason for Napa Valley Trip**



**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Vacation	52.9%	72.2%	65.5%	32.8%
Weekend getaway	23.2%	11.5%	21.9%	35.7%
Wedding or special event	11.9%	8.2%	10.1%	11.3%
Other personal travel	5.3%	4.7%	2.5%	13.0%
Conference, incentive trip, corporate or other group meeting	3.3%	3.3%	0.0%	6.1%
Just passing through the Napa area	0.9%	0.0%	0.0%	1.1%
Business travel	2.1%	0.0%	0.0%	0.0%
Government travel	0.0%	0.0%	0.0%	0.0%
Base	536	42	83	1204

Question: Which best describes the primary reason for making this visit to the Napa Valley?

Base: All respondents. 1865 responses.

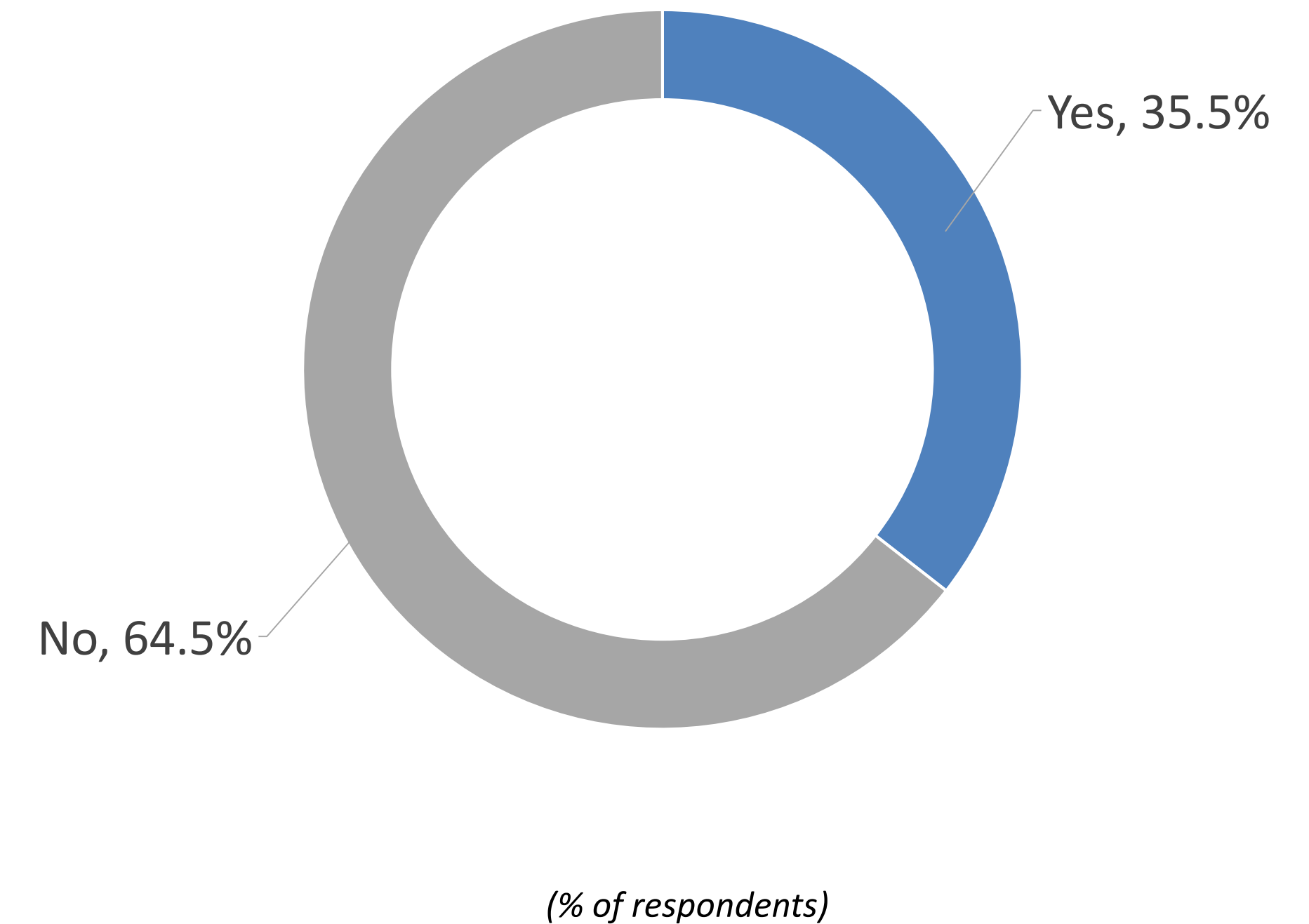


# Overnight Stay in the Napa Valley

**Over a third of survey respondents were overnight visitors to the Napa Valley.** In total, 35.5 percent of all visitors surveyed stayed overnight in the Napa Valley during their trip. In terms of visitor volume this equated to 1.4 million overnight visitors in 2018. Meanwhile, the remaining 64.5 percent were on a day trip to the destination. Based on the findings of this research the Napa Valley hosted 2.4 million day trip visitors.

Question: Are you staying overnight in the Napa Valley on this visit?  
Base: All respondents. 1865 responses.

**Chart 2: Overnight Stay in the Napa Valley**

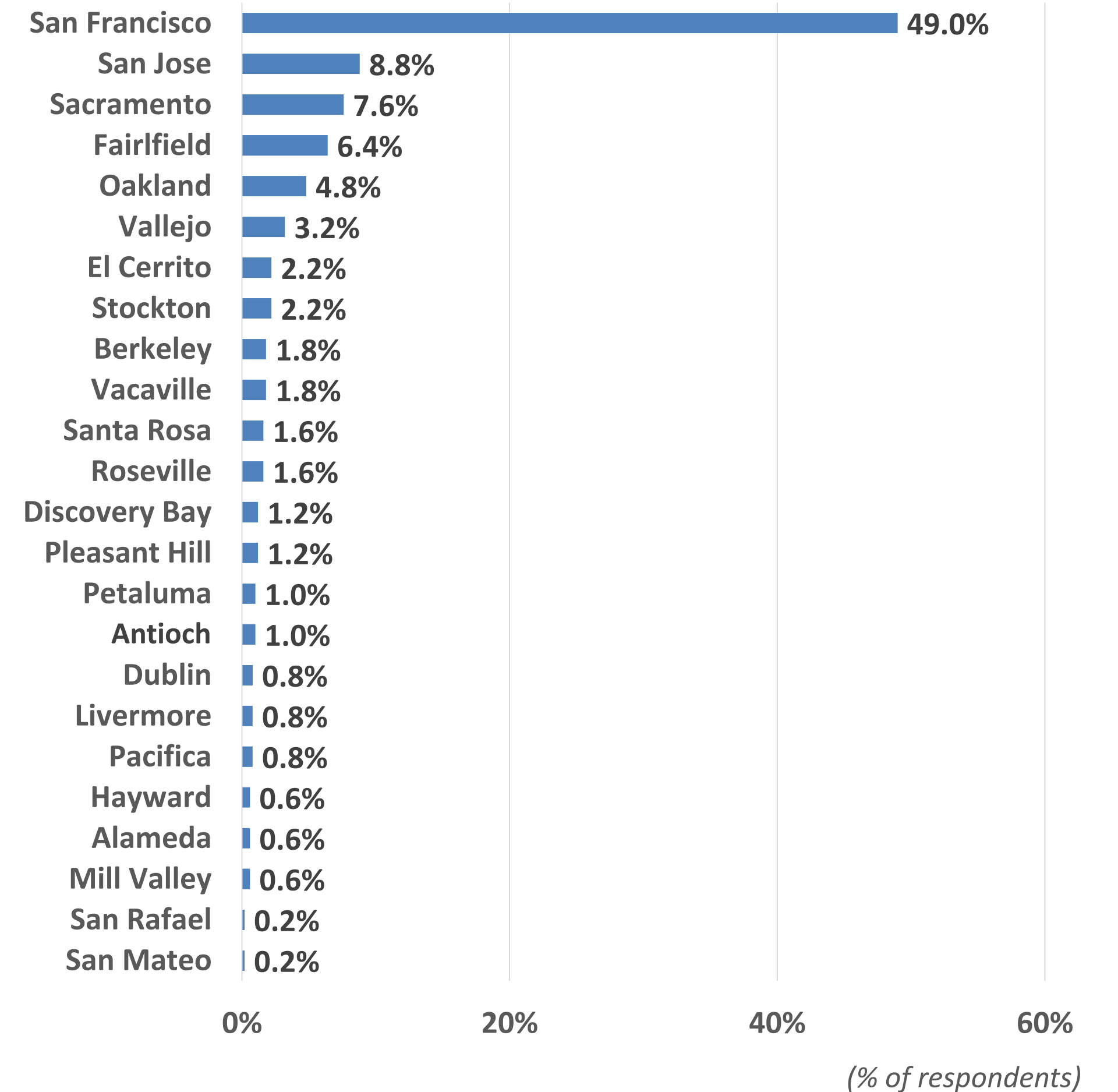




# Day Trip Visitors: City From Where Visitors are Day Tripping

Day-trip visitors primarily made their trip to the Napa Valley from San Francisco. The survey asked visitors who were not staying overnight in the Napa Valley where they made their day trip from. Nearly half of this group day tripped from San Francisco and just under one-in-ten came from San Jose (8.8%), Sacramento (7.6%) or Fairfield (6.4%).

Chart 3: City From Where Visitors are Day Tripping



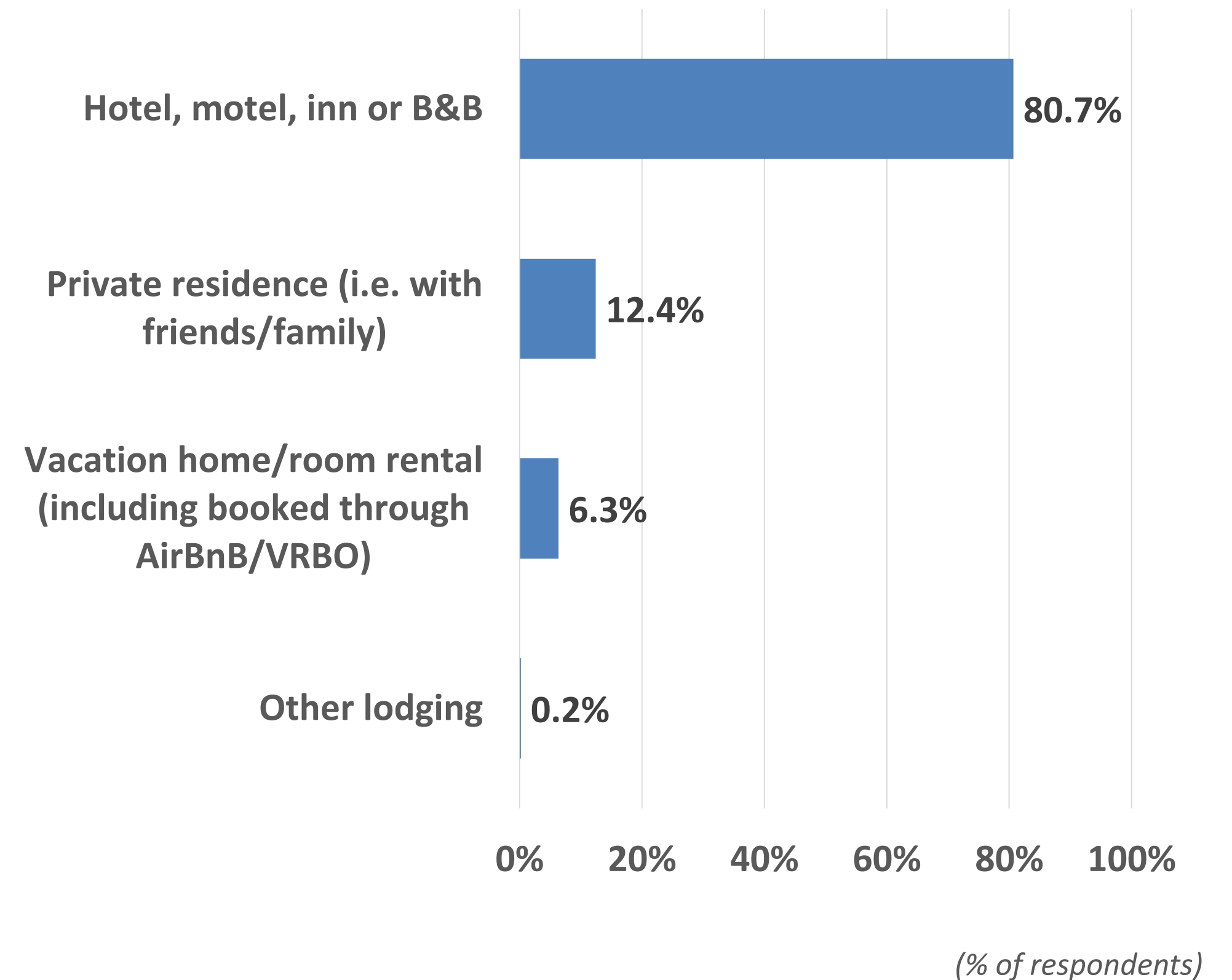
Question: What city did you make this day trip to Napa Valley from?  
Base: Respondents who came to the Napa Valley for a day trip. 705 responses.



# Overnight Visitors: Place of Stay in the Napa Valley Area

Eight-in-ten overnight visitors to the Napa Valley stayed in a hotel, motel, inn or B&B in the area during their trip. Meanwhile, 12.4 percent stayed in the private residence of a local friend or family member and 6.3 percent were in a vacation home or room rental.

Chart 4: Overnight Visitors: Place of Stay in the Napa Valley Area



Question: Where are you staying overnight in Napa Valley?

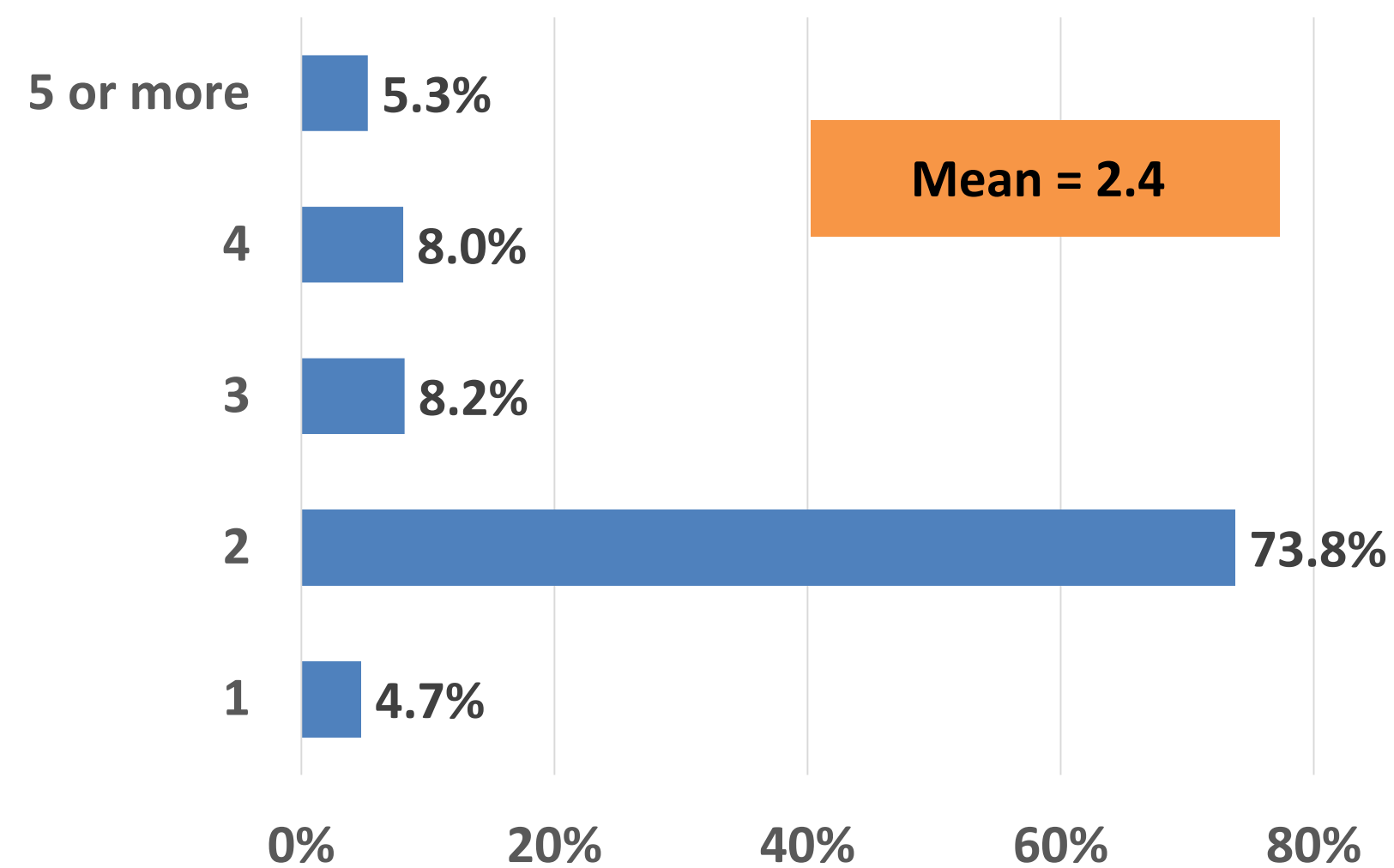
Base: Respondents who stayed overnight in the Napa Valley area during their visit. 664 responses.



# Paid Lodging Guests: Number of People in Lodging Accommodations

The typical Napa Valley visitor who stayed in paid accommodations had 2.4 people in their hotel or home share rental. The Napa Valley visitors who stayed in paid accommodations were asked how many people, including themselves, stayed in their room or rental. Nearly three-quarters stayed with one other person (73.8%), while 4.7 percent were the sole occupant.

**Chart 5: Number of People in Lodging Accommodations**



**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental
5 or more	5.2%	3.4%
4	7.8%	13.4%
3	7.6%	8.2%
2	74.6%	71.7%
1	4.7%	3.4%
<b>Mean</b>	<b>2.4</b>	<b>2.5</b>
Base	498	41

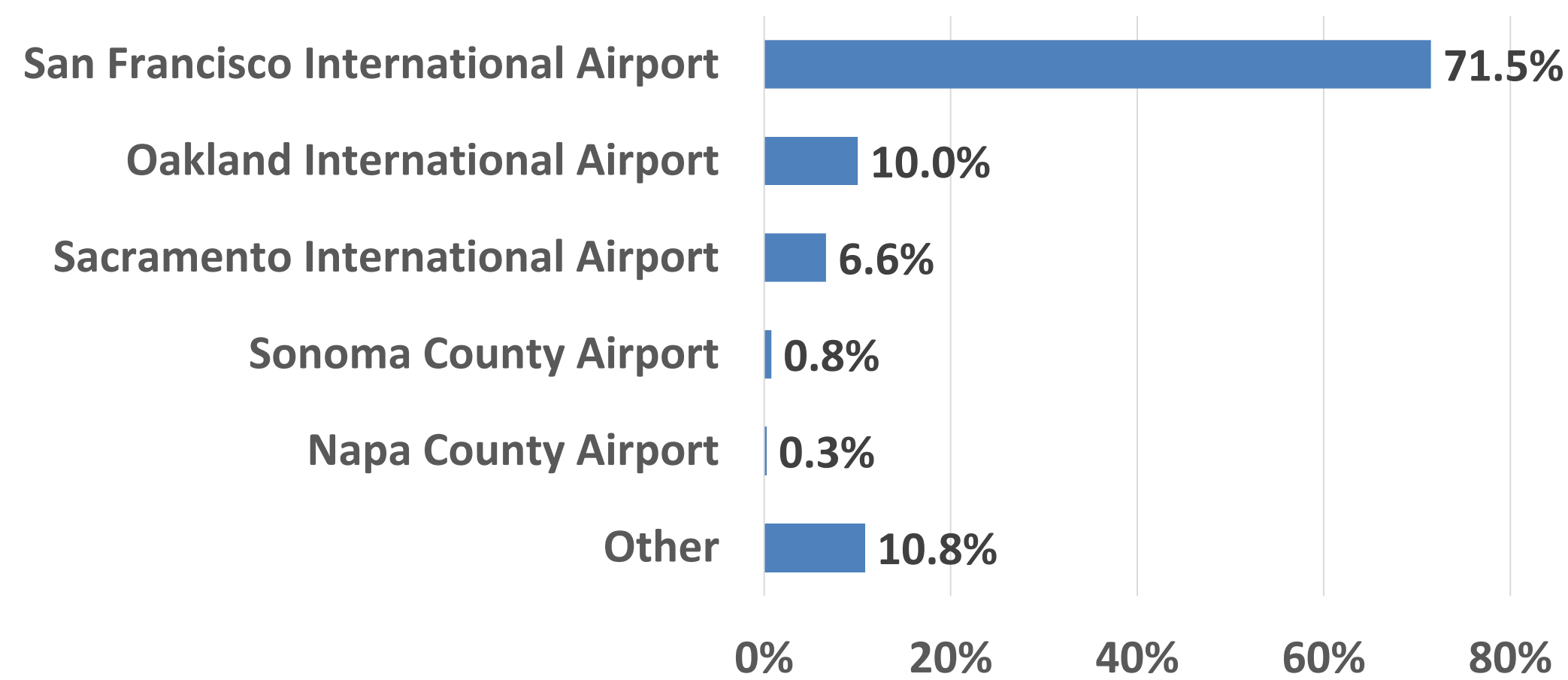
Question: How many people are staying in your lodging accommodations, including yourself?  
 Base: Respondents who stayed overnight in the Napa Valley in paid accommodations. 539 responses.



# Airport Used

The Napa Valley visitors who arrived into the area by plane primarily flew into the San Francisco International Airport (71.5%). Additionally, one-in-ten air arrival visitors flew into Oakland International Airport, followed by 6.6 percent who flew into the Sacramento Airport.

Chart 6: Airport Used



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
San Francisco International Airport	67.4%	70.6%	69.6%	74.6%
Oakland International Airport	11.8%	21.7%	10.9%	7.9%
Sacramento International Airport	9.6%	4.0%	13.0%	4.2%
Napa County Airport	0.3%	0.0%	0.0%	0.3%
Sonoma County Airport	0.2%	0.0%	0.0%	1.3%
Other	10.6%	3.7%	6.5%	11.8%
Base	352	35	61	539

Question: If you arrived in the area by plane, which airport did you use?

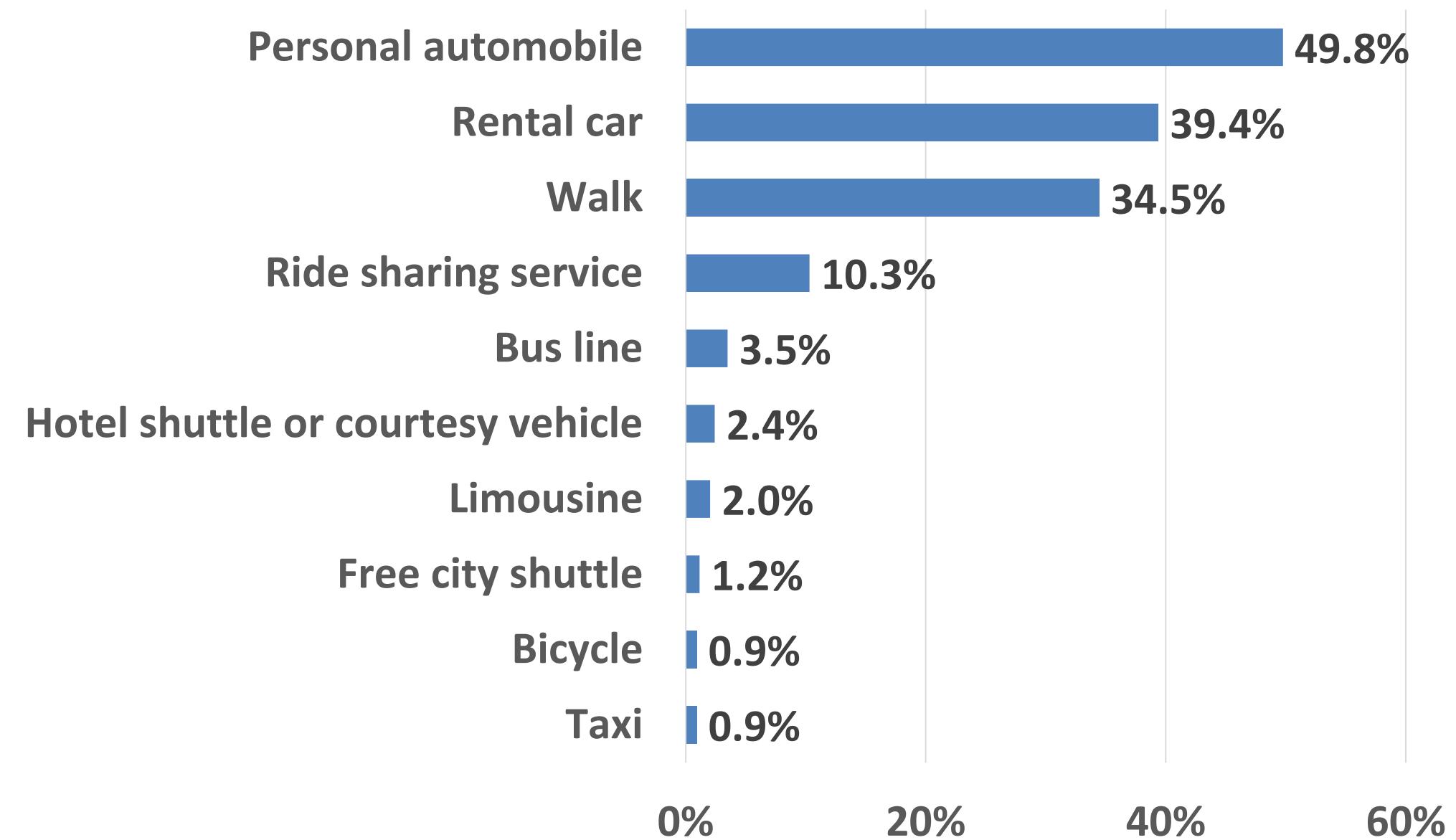
Base: Respondents who arrived to the area by plane. 987 responses.



# Modes of Transportation Used In-Market

Automobiles, either personal (49.8%) or rental cars (39.4%), and walking (34.5%) were the most utilized forms of transportation in the Napa Valley. Additionally, one-in-ten visitors also used a ride sharing services such as Uber or Lyft (10.3%) to travel around the destination. Lodging Guests were much more likely than day-trip visitors to have utilized ride sharing services in the Napa Valley during their trip (18.7% vs. 6.1%, respectively).

Chart 7: Modes of Transportation Used In-Market



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Personal automobile	33.4%	18.2%	41.0%	59.2%
Rental car	58.4%	73.4%	52.2%	28.4%
Walk	31.1%	35.0%	26.0%	36.5%
Uber/Lyft or other ride sharing service	18.7%	10.1%	16.8%	6.1%
Bus line	1.7%	1.7%	1.7%	4.5%
Hotel shuttle or courtesy vehicle	3.0%	0.0%	1.7%	2.3%
Limousine	3.7%	1.7%	0.0%	1.5%
Free city shuttle	0.7%	0.0%	3.4%	1.2%
Bicycle	2.6%	0.0%	0.0%	0.2%
Taxi	1.0%	0.0%	0.0%	1.0%
Base	527	41	79	1163

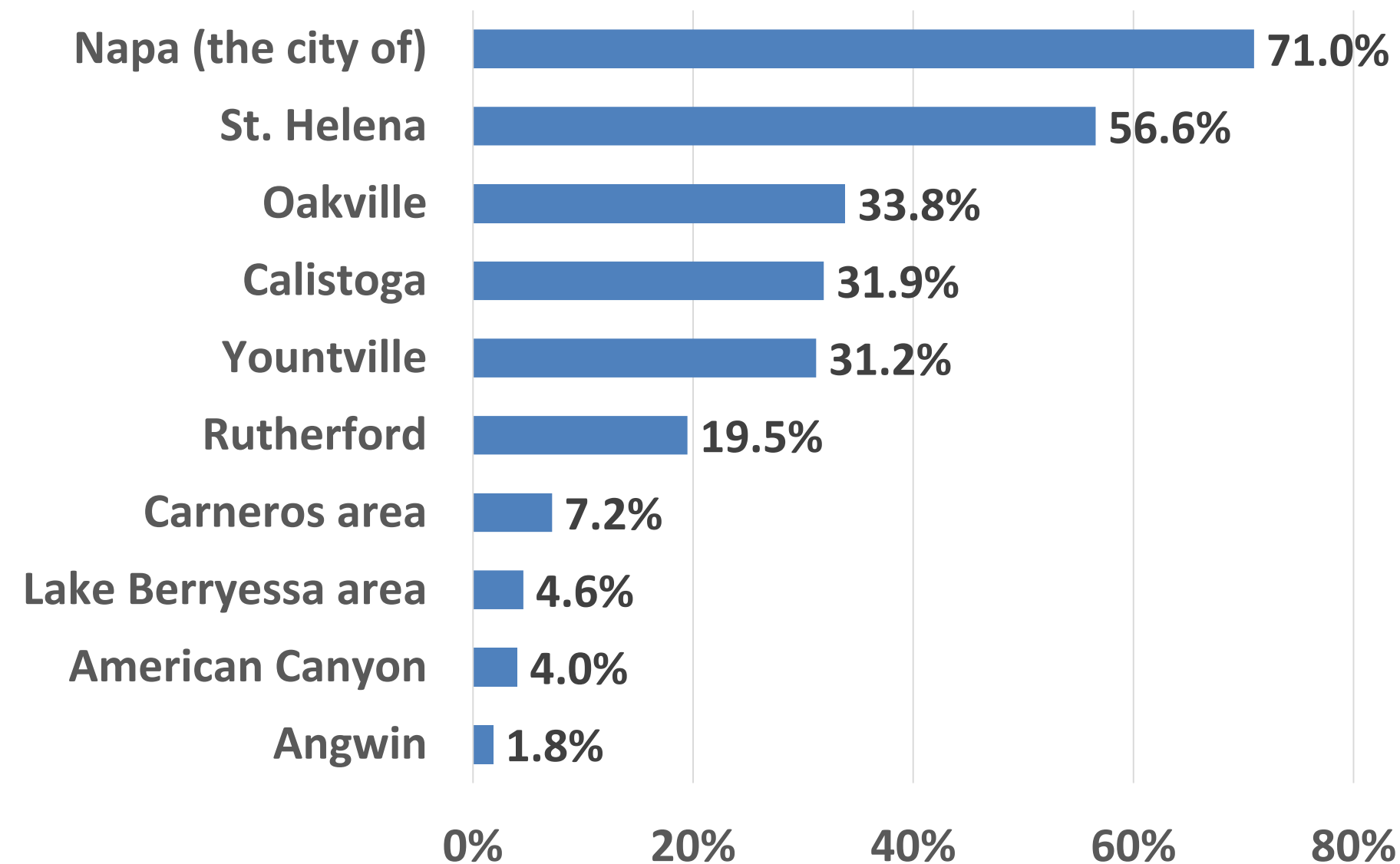
Question: On this trip, which methods of transportation will you utilize while in the Napa Valley? (SELECT ALL THAT APPLY) Base: All respondents. 1810 responses.



# The Napa Valley Areas Visited

Of the towns and areas tested, the cities of Napa (71.0%) and St. Helena (56.6%) had the highest reported visitation among all survey respondents. Interestingly, Lodging Guests were significantly more likely to have visited Calistoga and Yountville compared to day-trip visitors.

Chart 8: The Napa Valley Areas Visited



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Napa (the city of)	84.0%	85.1%	86.5%	63.5%
St. Helena	60.1%	70.0%	64.6%	54.0%
Oakville	31.0%	51.4%	38.7%	34.1%
Calistoga	43.8%	46.5%	37.1%	25.6%
Yountville	46.7%	54.9%	37.8%	22.7%
Rutherford	26.1%	34.8%	40.4%	14.4%
Carneros area	9.2%	18.2%	5.1%	6.1%
Lake Berryessa area	3.4%	10.1%	3.4%	5.0%
American Canyon	6.8%	11.7%	0.0%	2.8%
Angwin	1.6%	5.0%	0.0%	1.9%
Base	526	41	79	1158

Question: On this trip, which Napa Valley towns or areas have you (or will you) visit? (SELECT ALL THAT APPLY) Base: All respondents. 1804 responses.



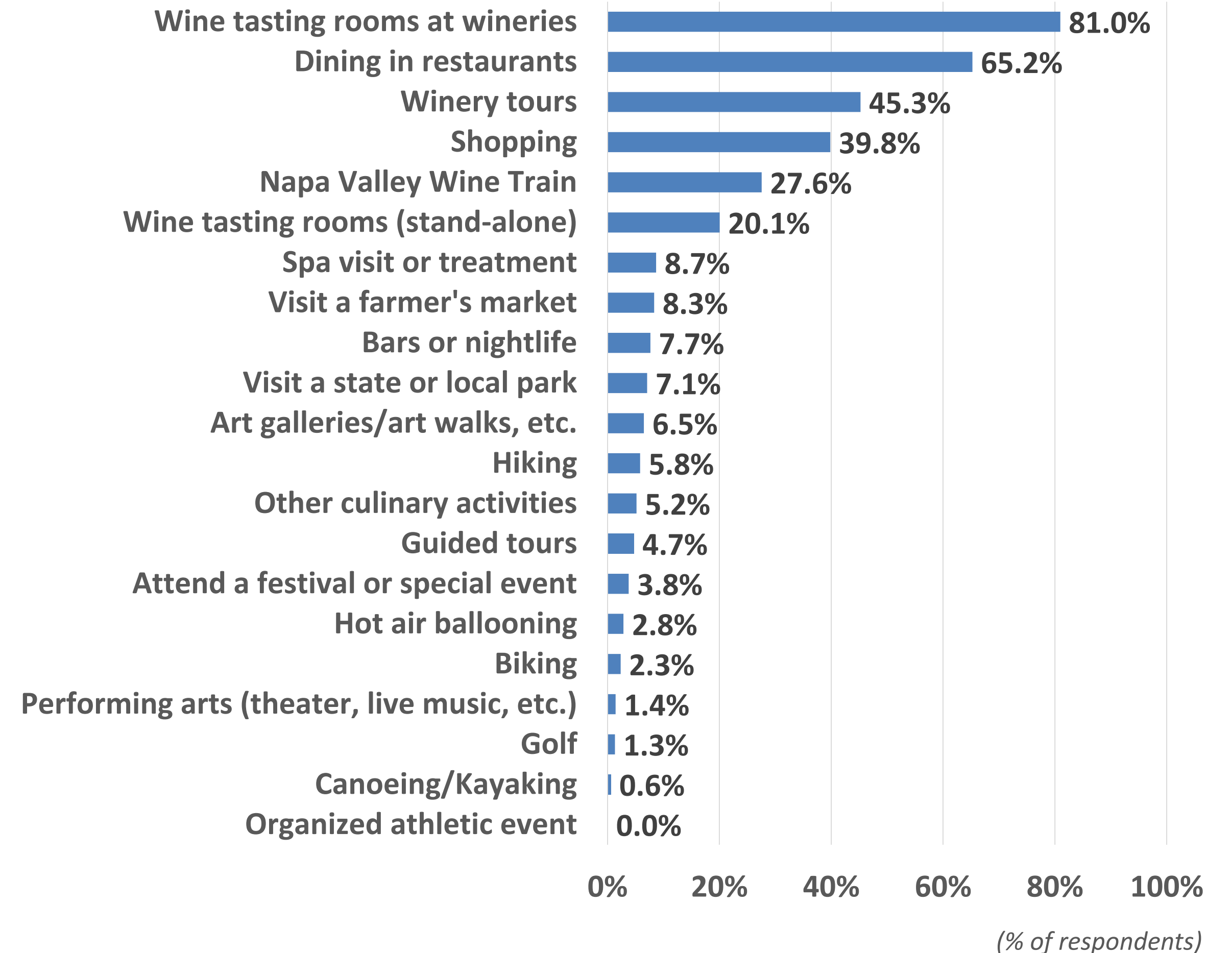
# Activities/Attractions in the Napa Valley

The Napa Valley’s visitors participated in a wide variety of activities but most commonly went to wine tasting rooms at wineries, dined in restaurants and went on winery tours. Presented with a list of twenty-one activities, visitors were asked which they would participate in during their time in the Napa Valley. Beyond tasting rooms at wineries, restaurants and winery tours, one-in-five or more visitors also went shopping (39.8%), on the Napa Valley Wine Train (27.6%) and/or to stand-alone wine tasting rooms (20.1%) on their trip.

*The data segmented by visitor type is presented on the next slide.*

Question: On this trip, which activities or attractions will you participate in while in the Napa Valley? (SELECT ALL THAT APPLY) Base: All respondents. 1806 responses.

**Chart 9: Activities/Attractions in the Napa Valley**





# Activities/Attractions – Complete Details

## Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Wine tasting rooms at wineries	81.9%	81.5%	80.7%	80.5%
Dining in restaurants	83.6%	81.8%	84.1%	54.9%
Winery tours	48.5%	66.9%	39.5%	43.3%
Shopping	49.1%	54.7%	57.1%	34.1%
The Napa Valley Wine Train	30.7%	43.4%	36.9%	25.1%
Wine tasting rooms (stand-alone)	23.7%	24.7%	24.4%	18.0%
Spa visit or treatment	15.4%	8.2%	5.1%	6.0%
Visit a farmer's market	11.9%	30.0%	16.8%	5.2%
Bars or nightlife	17.8%	15.1%	5.1%	2.9%
Visit a state or local park	9.5%	10.1%	11.8%	5.5%
Art galleries/art walks, etc.	10.1%	9.8%	13.5%	4.3%
Hiking	9.3%	11.7%	15.2%	3.4%
Other culinary activities	8.1%	5.0%	3.4%	3.9%
Guided tours	6.4%	5.0%	5.1%	3.9%
Attend a festival or special event	5.4%	1.7%	5.1%	3.0%
Hot air ballooning	6.1%	10.1%	5.1%	1.0%
Biking	4.6%	3.4%	5.1%	1.1%
Performing arts (theater, live music, etc.)	2.2%	1.7%	3.4%	1.0%
Golf	2.3%	1.7%	3.4%	0.6%
Canoeing/Kayaking	1.0%	0.0%	3.4%	0.2%
Organized athletic event	0.1%	0.0%	0.0%	0.0%
Base	527	41	79	1156

Question: On this trip, in which activities or attractions will you participate in while in the Napa Valley? (SELECT ALL THAT APPLY)

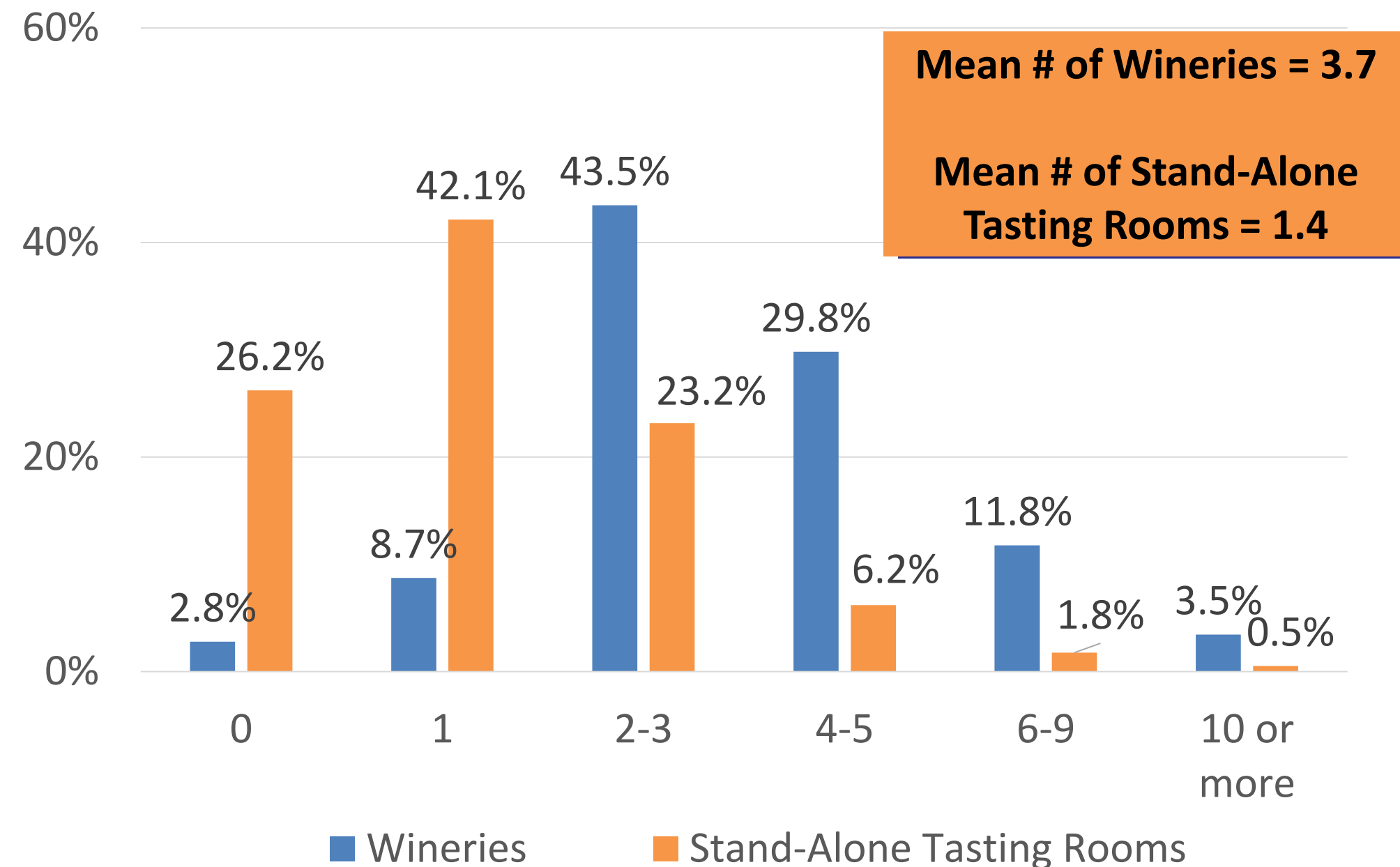
Base: All respondents. 1803 responses.



# The Number of Napa Valley Wineries Visited

The average Napa Valley visitor went to 3.7 wineries and 1.4 stand-alone tasting rooms during their trip to the area. The Napa Valley visitors were asked how many area wineries and tasting rooms they visited or planned to visit during their trip. Nearly all visitors surveyed went to at least one winery while on their Napa Valley trip (97.2%), while 73.8 percent went to at least one tasting room. As expected, overnight visitors went to more wineries and tasting rooms on average compared to day-trip visitors.

Chart 10: The Number of Napa Valley Wineries Visited



Detail by Type of Visitor

	Lodging Guest		Home Share Rental		VFR		Day Trip	
	Wineries	Tasting Rooms	Wineries	Tasting Rooms	Wineries	Tasting Rooms	Wineries	Tasting Rooms
10 or more	8.1%	1.7%	4.8%	0.0%	9.0%	0.0%	0.9%	0.0%
6-9	21.4%	2.0%	36.7%	6.1%	10.8%	3.8%	6.4%	1.5%
4-5	28.0%	8.9%	21.8%	6.1%	41.5%	11.4%	30.1%	4.7%
2-3	28.7%	27.8%	33.3%	35.8%	35.0%	41.4%	51.4%	19.9%
1	8.3%	33.2%	3.4%	42.3%	1.8%	28.3%	9.6%	46.7%
0	5.5%	26.3%	0.0%	9.8%	1.8%	15.2%	1.7%	27.1%
Mean	<b>4.5</b>	<b>1.8</b>	<b>5.2</b>	<b>2.0</b>	<b>4.7</b>	<b>2.1</b>	<b>3.2</b>	<b>1.2</b>
Base	508		41		73		1103	

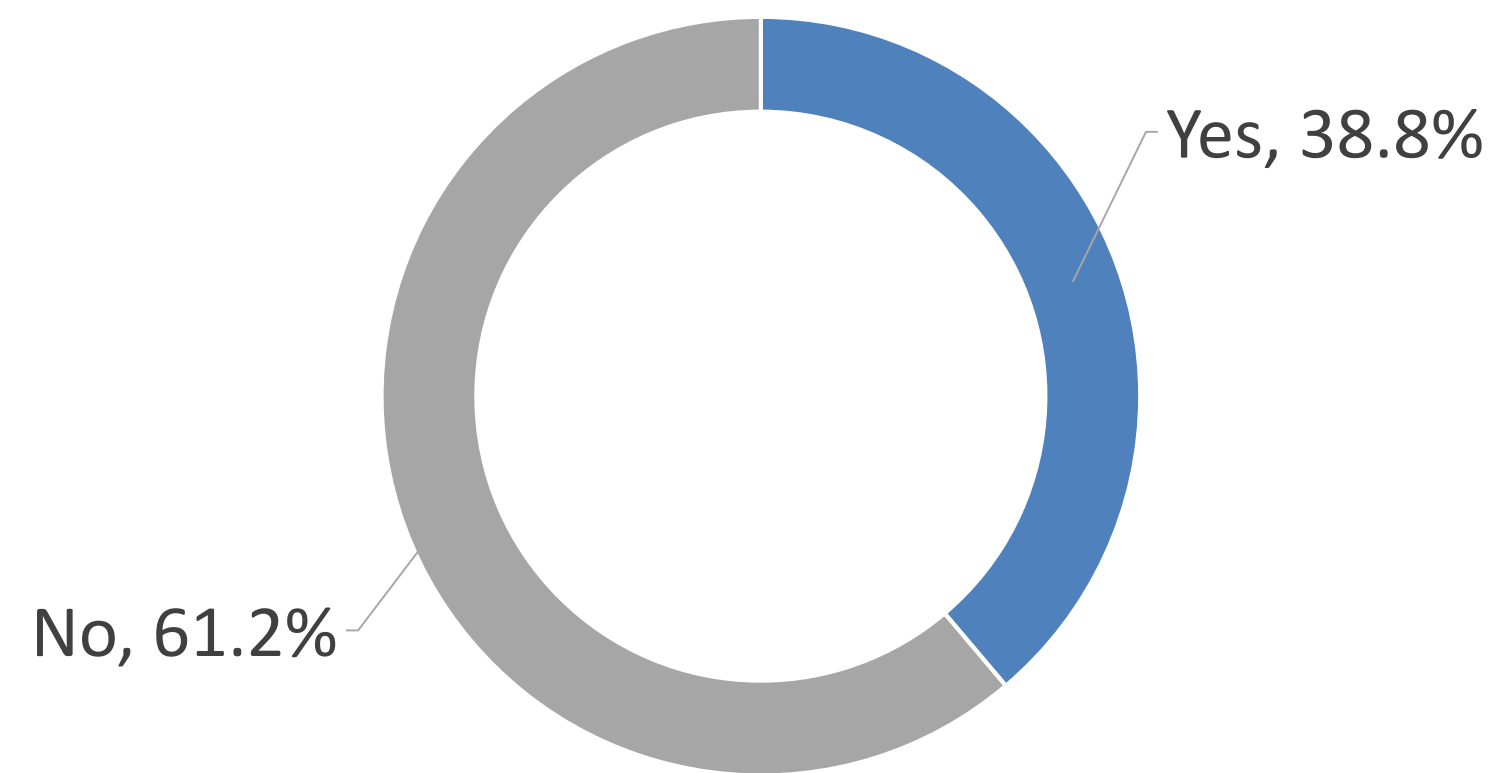
Question: How many Napa Valley wineries and stand-alone tasting rooms did you visit during your stay? Base: All respondents. 1725 responses.



# Winery Reservations

**Four-in-ten visitors surveyed made advance appointments to visit the Napa Valley wineries (38.8%).** Lodging guests were significantly more likely to have made advance appointments for wineries compared to day-trippers (50.2% vs. 32.8%, respectively).

**Chart 11: Winery Reservations**



**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Yes	50.2%	55.5%	39.0%	32.8%
No	49.8%	44.5%	61.0%	67.2%
Base	496	40	66	1056

Question: Did you make advance appointments to visit Napa Valley wineries?

Base: All respondents. 1658 responses.



# Daily In-Market Spending

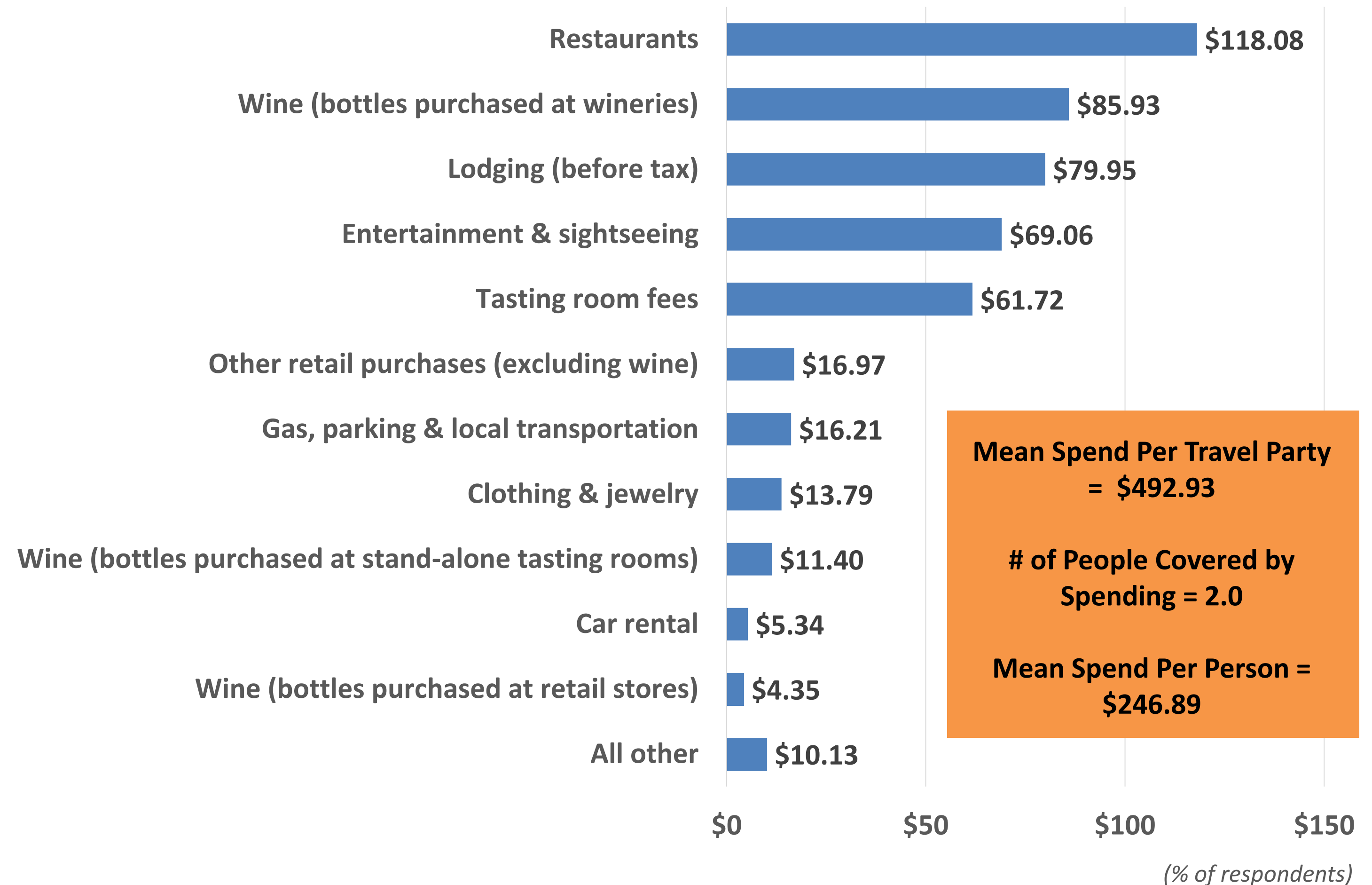
The typical 2018 visiting travel party to the Napa Valley spent **\$492.93 per trip day in the area**. The bulk of this spending is attributed to restaurants (\$118.08) and wine purchased at wineries (\$85.93). Since this reported travel party spend covered an average of 2.0 people, it is estimated that each of the Napa Valley visitor represents \$246.89 in daily in-market spending.

It is important to note that the \$79.95 average spend for lodging (shown at right) includes all visitors, even those not staying in paid commercial lodging. This data is not reflective of average room rates. The average lodging guest surveyed reported spending \$250.56 on lodging before tax (shown on the breakout table on the following page).

*Travel party spending data segmented by visitor type is presented on the next slide.*

Question: Approximately how much will you spend in the Napa Valley PER DAY on the following? Base: All respondents. 1816 responses.

**Chart 12: Daily In-Market Spending**





# Daily In-Market Spending (continued)

## Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Restaurants	\$169.25	\$165.06	\$150.11	\$89.82
Wine (bottles purchased at wineries)	\$113.24	\$101.92	\$54.20	\$74.91
Lodging (before tax)	\$250.56	\$254.11	\$0.37	\$0.00
Entertainment & sightseeing	\$76.48	\$81.49	\$85.74	\$64.04
Tasting room fees	\$75.69	\$102.66	\$69.51	\$52.77
Other retail purchases (excluding wine)	\$22.49	\$14.49	\$13.53	\$14.46
Gas, parking & local transportation	\$23.10	\$8.85	\$23.27	\$12.54
Clothing & jewelry	\$22.14	\$6.94	\$23.45	\$9.44
Wine (bottles purchased at stand-alone tasting rooms)	\$20.47	\$6.38	\$17.75	\$6.34
Car rental	\$13.25	\$1.39	\$0.92	\$2.01
Wine (bottles purchased at retail stores)	\$7.37	\$5.42	\$0.00	\$3.18
All other	\$15.96	\$0.69	\$8.09	\$7.89
<b>Mean Spending per Travel Party</b>	<b>\$810.00</b>	<b>\$749.41</b>	<b>\$446.94</b>	<b>\$337.40</b>
# of People Covered by Spending	2.0	2.0	2.0	2.0
<b>Mean Spending per Person</b>	<b>\$405.28</b>	<b>\$370.66</b>	<b>\$218.21</b>	<b>\$169.64</b>
Base	529	40	79	1165

Question: Approximately how much will you spend in the Napa Valley PER DAY on the following?

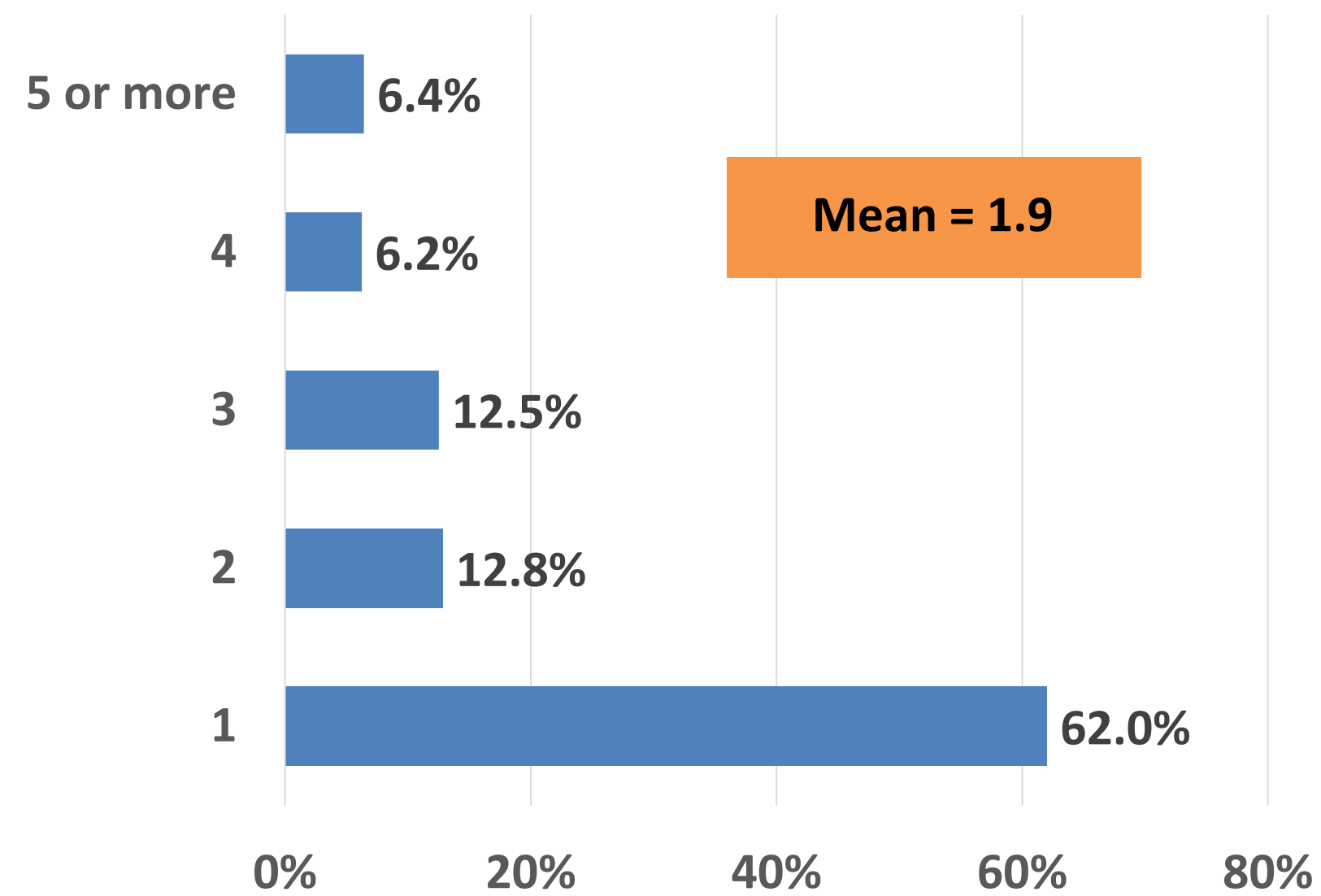
Base: All respondents. 1813 responses.



# Days Spent in the Napa Valley

The average Napa Valley visitor spent 1.9 days in the destination during their trip. The Napa Valley visitors who stayed in a hotel, motel, inn or B&B spent an average of 3.0 days in the area.

Chart 14: Days Spent in the Napa Valley



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
5 or more	14.2%	18.5%	21.0%	0.0%
4	14.1%	17.1%	18.1%	0.0%
3	28.6%	42.4%	34.4%	0.0%
2	33.2%	11.9%	20.8%	0.0%
1	10.0%	10.0%	5.7%	100.0%
<b>Mean</b>	<b>3.0</b>	<b>3.4</b>	<b>3.4</b>	<b>1.0</b>
Base	510	41	69	866

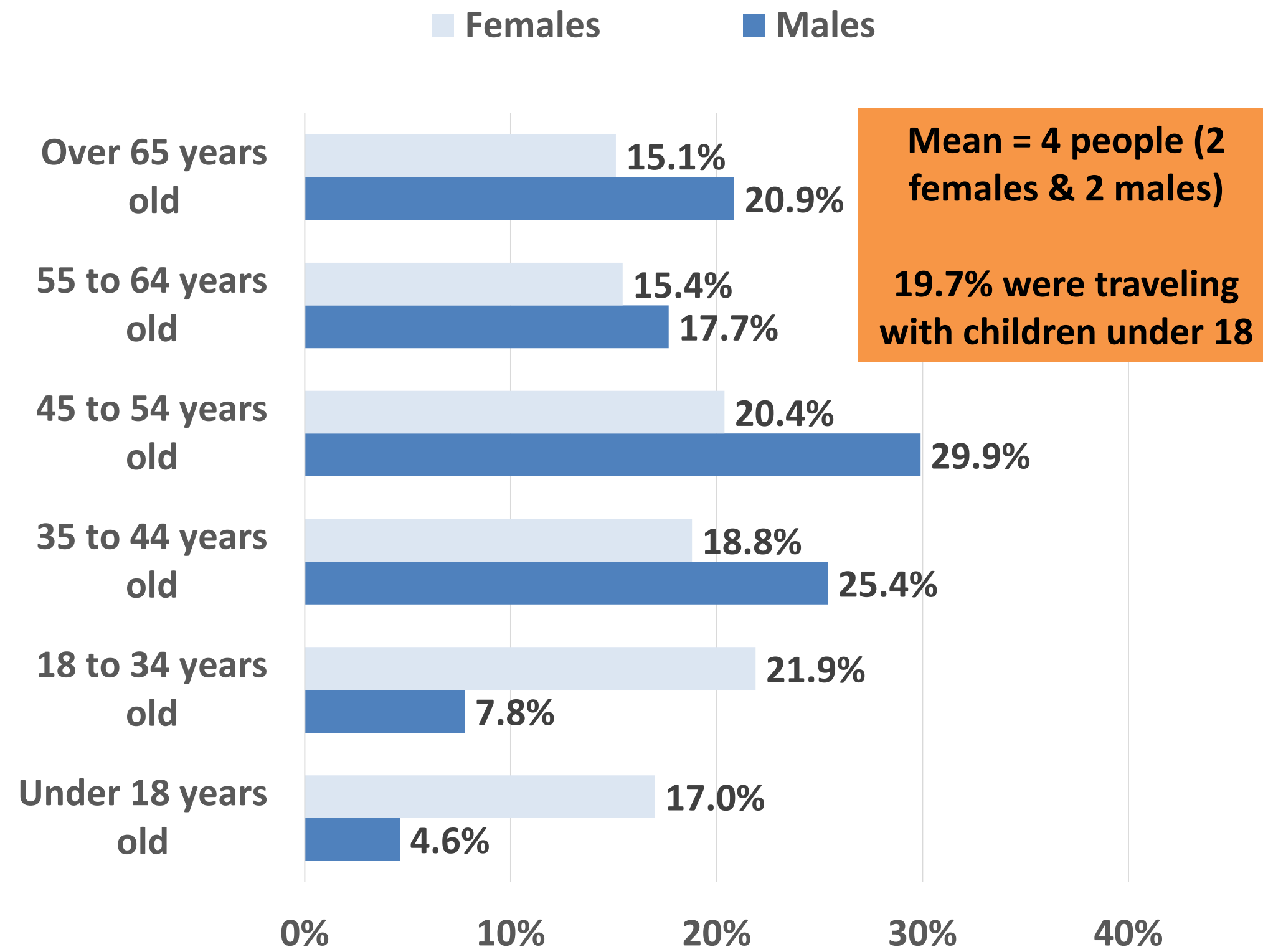
Question: How many days will you spend in the Napa Valley?  
 Base: All respondents. 1486 responses.



# Travel Group Composition

The typical Napa Valley travel group consisted of 4 people, comprised of approximately 2 females and 2 males.

Chart 15: Travel Group Composition



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
<b>Males</b>				
Under 18 years old	3.2%	3.3%	4.8%	5.3%
18 to 34 years old	6.7%	3.3%	4.8%	8.7%
35 to 44 years old	19.9%	32.8%	12.8%	28.3%
45 to 54 years old	24.5%	44.3%	22.4%	32.1%
55 to 64 years old	17.8%	17.9%	14.4%	17.9%
Over 65 years old	20.3%	11.5%	16.8%	21.7%
<b>Mean # of Males</b>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>	<b>3.0</b>
<b>Females</b>				
Under 18 years old	15.0%	13.2%	10.4%	18.5%
18 to 34 years old	21.6%	9.9%	20.0%	22.7%
35 to 44 years old	18.3%	11.3%	17.6%	19.3%
45 to 54 years old	20.9%	11.3%	20.0%	20.6%
55 to 64 years old	19.9%	22.9%	20.0%	12.9%
Over 65 years old	18.2%	22.9%	19.2%	13.2%
<b>Mean # of Females</b>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>
<b>Mean # of People in Travel Party</b>	<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	<b>5.0</b>
<b>% Traveling with Children Under 18</b>	<b>17.0%</b>	<b>16.5%</b>	<b>15.2%</b>	<b>21.3%</b>
Base	536	42	83	1204

Question: Please tell us how many people (including yourself) of each age group and gender are in your immediate travel party. Base: All respondents. 1865 responses.



# Planning Resources Used Before Arrival

Reviews websites, mapping websites and other travel websites were the resources visitors used most to plan their Napa Valley trip pre-arrival. OTAs (14.8%), social media (13.7%) and VisitNapaValley.com (13.4%) were the next most utilized travel planning resources. Overnight visitors were slightly more likely than day-trip visitors to have turned to VisitNapaValley.com to plan their trip pre-arrival.

**Chart 16: Planning Resources Used Before Arrival**



**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Reviews websites (i.e. Yelp, TripAdvisor)	55.1%	63.9%	28.9%	38.9%
Mapping websites (i.e. Google Maps)	31.8%	22.9%	12.8%	24.0%
Other travel websites	24.2%	39.2%	19.2%	17.3%
Online travel agencies (i.e. Expedia, Priceline)	21.9%	36.3%	17.6%	10.4%
Social Media (i.e. Facebook, Snapchat)	16.8%	11.5%	15.9%	12.2%
www.VisitNapaValley.com	16.6%	33.0%	17.6%	10.9%
Magazines and/or newspapers	8.2%	11.5%	3.9%	4.7%
Free winery map(s) and/or winery guide(s)	8.7%	4.9%	4.8%	4.4%
Official Napa Valley Visitors Guide	7.7%	8.0%	4.8%	3.5%
Free travel guide book(s) or brochures	6.2%	9.9%	1.6%	3.5%
Traditional travel agency	4.3%	3.3%	3.2%	2.5%
Commercial travel guidebooks (i.e. Lonely Planet)	4.2%	0.0%	1.6%	0.9%
Base	536	42	83	1204

Question: Which of the following tools did you use specifically to plan your trip before arriving and which will you use while in the Napa Valley area? (SELECT ALL THAT APPLY)

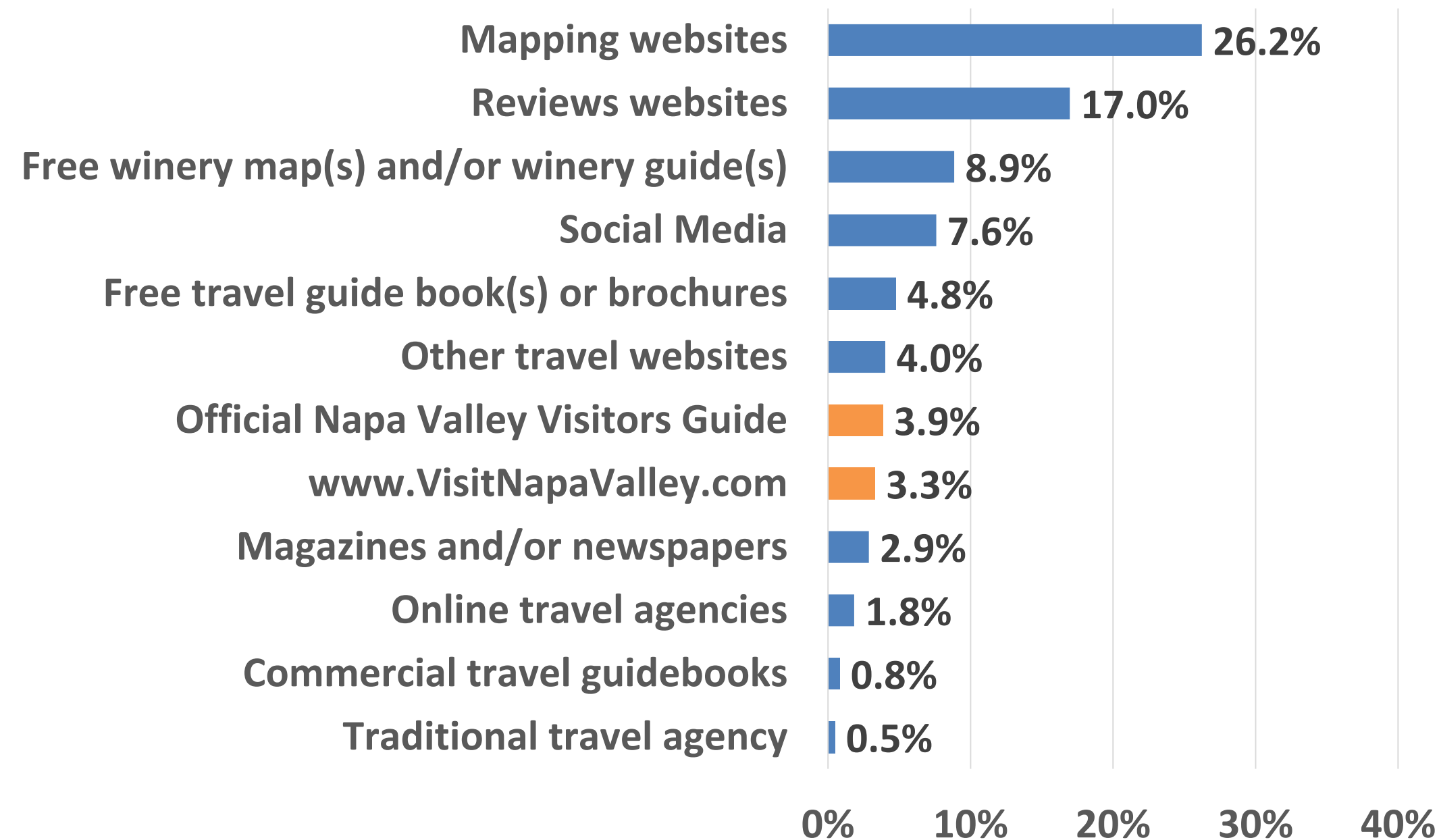
Base: All respondents. 1865 responses.



# Planning Resources Used In-Market

Mapping websites and review websites continue to be top travel planning resources in-market followed by free winery maps. Just under 5 percent of respondents used the official Napa Valley Visitors Guide (3.9%) and/or VisitNapaValley.com (3.3%) to continue planning their Napa Valley area trip in the destination.

Chart 17: Planning Resources Used In-Market



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Mapping websites (i.e. Google Maps)	30.8%	31.3%	9.6%	25.2%
Reviews websites (i.e. Yelp, TripAdvisor)	24.0%	19.6%	11.2%	14.2%
Free winery map(s) and/or winery guide(s)	14.6%	9.9%	11.2%	6.1%
Social Media (i.e. Facebook, Snapchat)	10.4%	3.3%	7.1%	6.6%
Free travel guide book(s) or brochures	6.5%	8.2%	4.8%	3.9%
Other travel websites	4.9%	1.4%	4.8%	3.7%
Official Napa Valley Visitors Guide	7.4%	8.2%	4.8%	2.0%
www.VisitNapaValley.com	6.4%	16.5%	3.2%	1.4%
Magazines and/or newspapers	5.5%	0.0%	3.9%	1.8%
Online travel agencies (i.e. Expedia, Priceline)	2.1%	1.6%	6.4%	1.4%
Commercial travel guidebooks (i.e. Lonely Planet)	1.6%	0.0%	1.6%	0.5%
Traditional travel agency	0.7%	0.0%	0.0%	0.5%
Base	536	42	83	1204

Question: Which of the following tools did you use specifically to plan your trip before arriving and which will you use while in the Napa Valley area? (SELECT ALL THAT APPLY) Base: All respondents. 1865 responses.

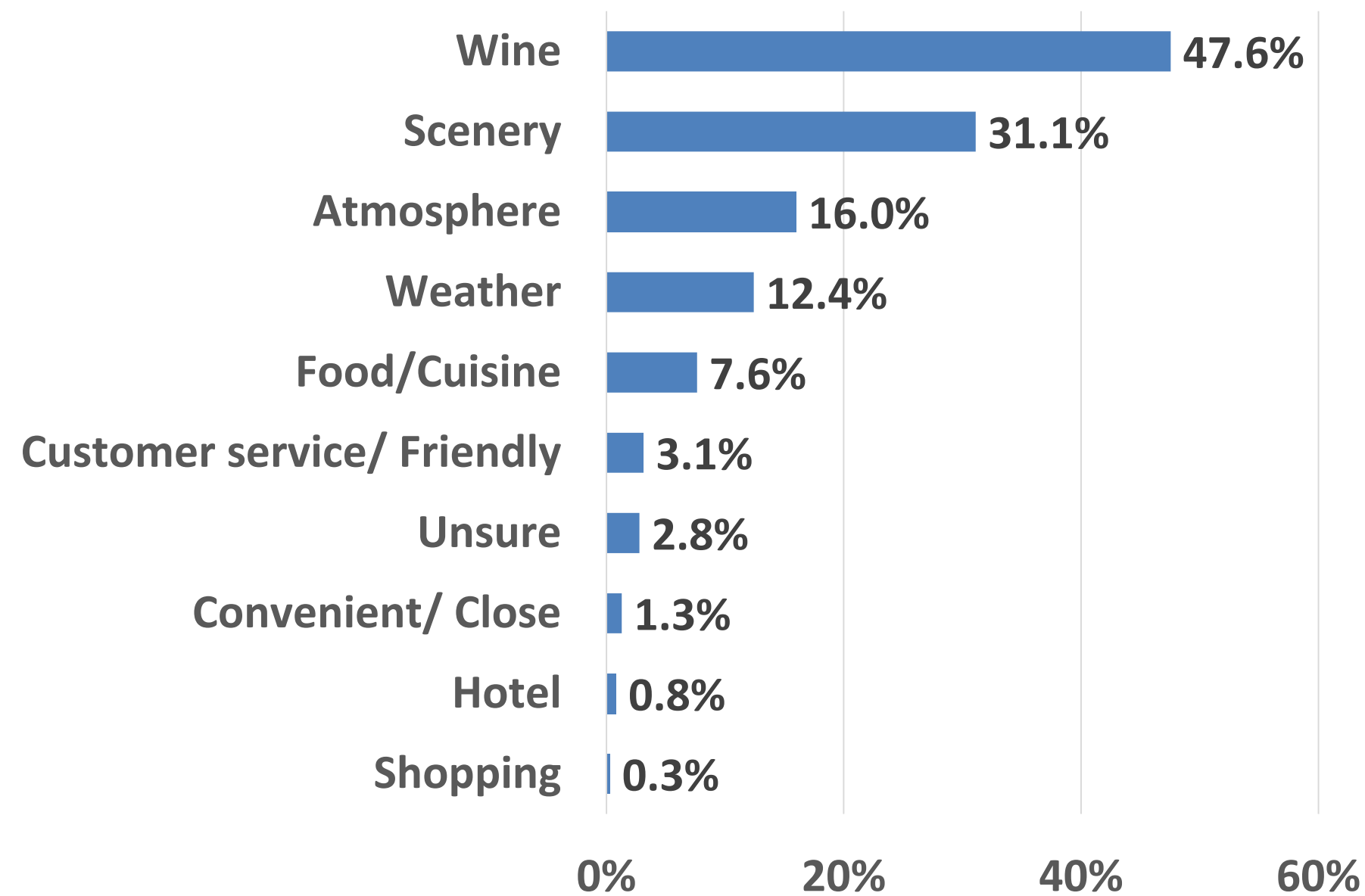


# Most-Liked Aspects of the Napa Valley

Visitors to the Napa Valley area most value the destination's wine (47.6%), scenery (31.1%), atmosphere (16.0%) and weather (12.4%). Additionally, 7.6 percent of visitors cited the area's culinary scene as their most-liked aspect of the Napa Valley. Surveyed visitors were asked, in an open-ended format, what they liked best about their experience in the Napa Valley. The chart and table below list the top cited responses.

Chart 18: Most-Liked Aspects of the Napa Valley

Detail by Type of Visitor



	Lodging Guest	Home Share Rental	VFR	Day-Trip
Wine	49.0%	49.1%	31.9%	47.9%
Scenery	26.5%	45.8%	17.6%	33.6%
Atmosphere	13.5%	8.2%	16.8%	17.3%
Weather	15.0%	24.7%	20.8%	10.2%
Food/Cuisine	10.2%	6.6%	6.4%	6.6%
Customer service/ Friendly	3.8%	6.6%	3.2%	2.7%
Unsure	3.3%	1.6%	2.3%	2.7%
Convenient/ Close	1.4%	0.0%	1.6%	1.3%
Hotel	2.3%	1.6%	2.3%	0.1%
Shopping	0.0%	0.0%	0.0%	0.5%
Base	536	42	83	1204

Question: Which aspects of the Napa Valley do you like best? (VERBATIM RESPONSE)

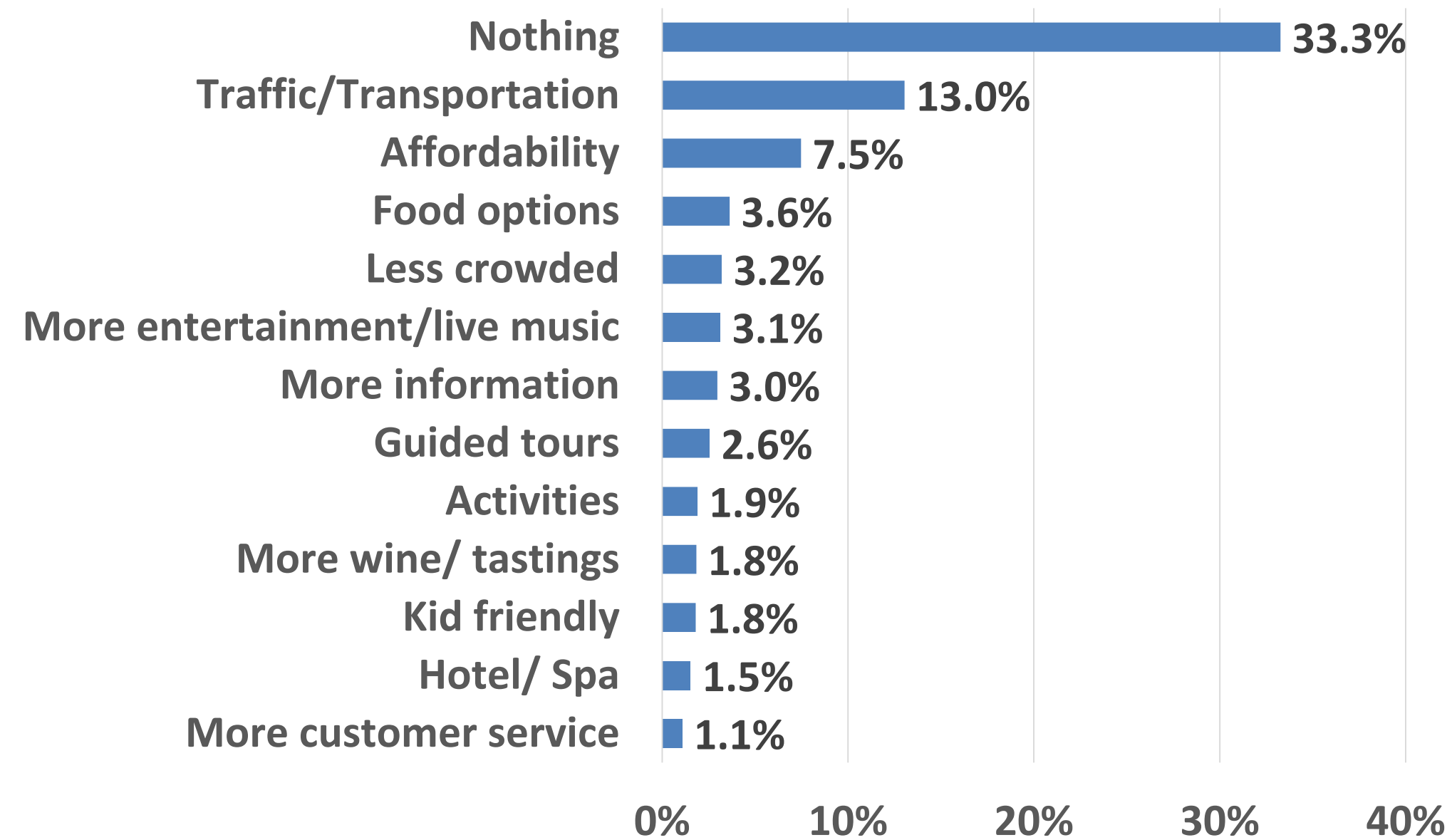
Base: All respondents. 1865 responses.



# Attractions/Services that Would Enhance the Napa Valley

When asked what attractions or services would have most enhanced visitors' experience in the Napa Valley, one-third of respondents said there was "nothing" the destination needed (33.3%). Of the specific suggestions provided, alleviating traffic (13.0%) and making the area more affordable (7.5%) were the top-cited services that would enhance the Napa Valley experience. Approximately 5 percent of lodging guests surveyed also suggested adding more food options (4.4%) and/or more entertainment/live music (4.6%).

Chart 19: Attractions/Services that Would Enhance the Napa Valley



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Nothing	31.5%	24.3%	28.9%	34.7%
Traffic/Transportation	12.5%	26.4%	16.0%	12.6%
Affordability	6.3%	3.3%	0.7%	8.7%
Food options	4.4%	0.0%	3.2%	3.4%
Less crowded	0.7%	3.3%	0.7%	4.6%
More entertainment/live music	4.6%	1.6%	0.0%	2.7%
More information	3.3%	8.2%	1.6%	2.7%
Guided tours	2.4%	3.3%	1.6%	2.6%
Activities	1.9%	0.0%	1.6%	2.0%
More wine/ tastings	2.1%	3.1%	6.4%	1.4%
Kid friendly	2.4%	0.0%	3.2%	1.5%
Hotel/ Spa	2.4%	1.6%	0.0%	1.2%
More customer service	1.5%	0.0%	3.2%	0.8%
Base	536	42	83	1204

Question: In your opinion, what attractions or services would most enhance the Napa Valley?  
(VERBATIM RESPONSE) Base: All respondents. 1865 responses.

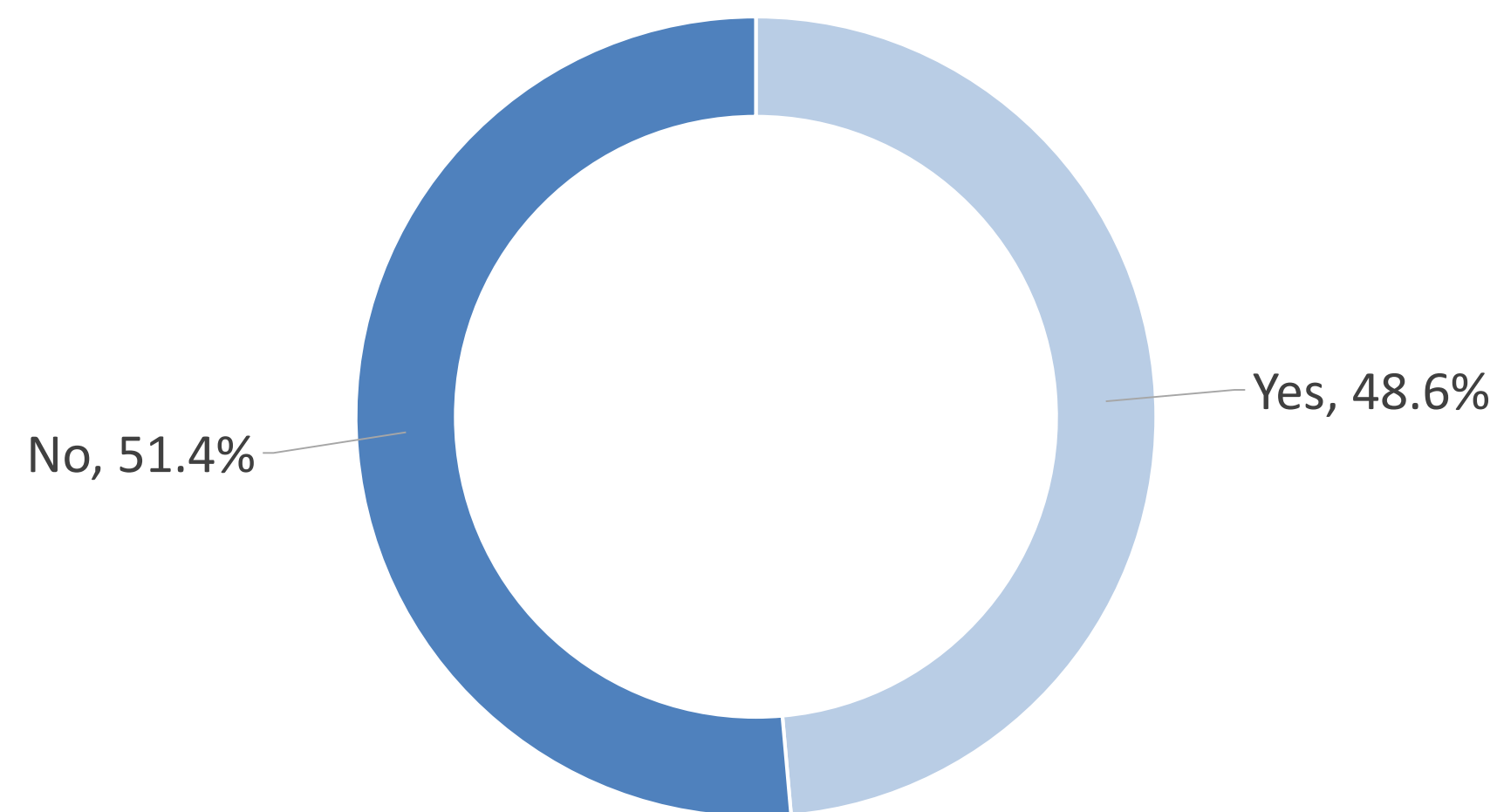


# First-Time Visitor to the Napa Valley

Nearly half of respondents were first-time visitors to the Napa Valley (48.6%). The remaining 51.4 percent were repeat visitors. Lodging guests were slightly more likely to be first-time visitors to the area compared to day-trippers (51.8% vs. 45.4%, respectively).

Chart 20a: First-Time Visitor to the Napa Valley

Detail by Type of Visitor



	Lodging Guest	Home Share Rental	VFR	Day-Trip
Yes	51.8%	72.5%	60.4%	45.4%
No	48.2%	27.5%	39.6%	54.6%
Base	509	40	73	1114

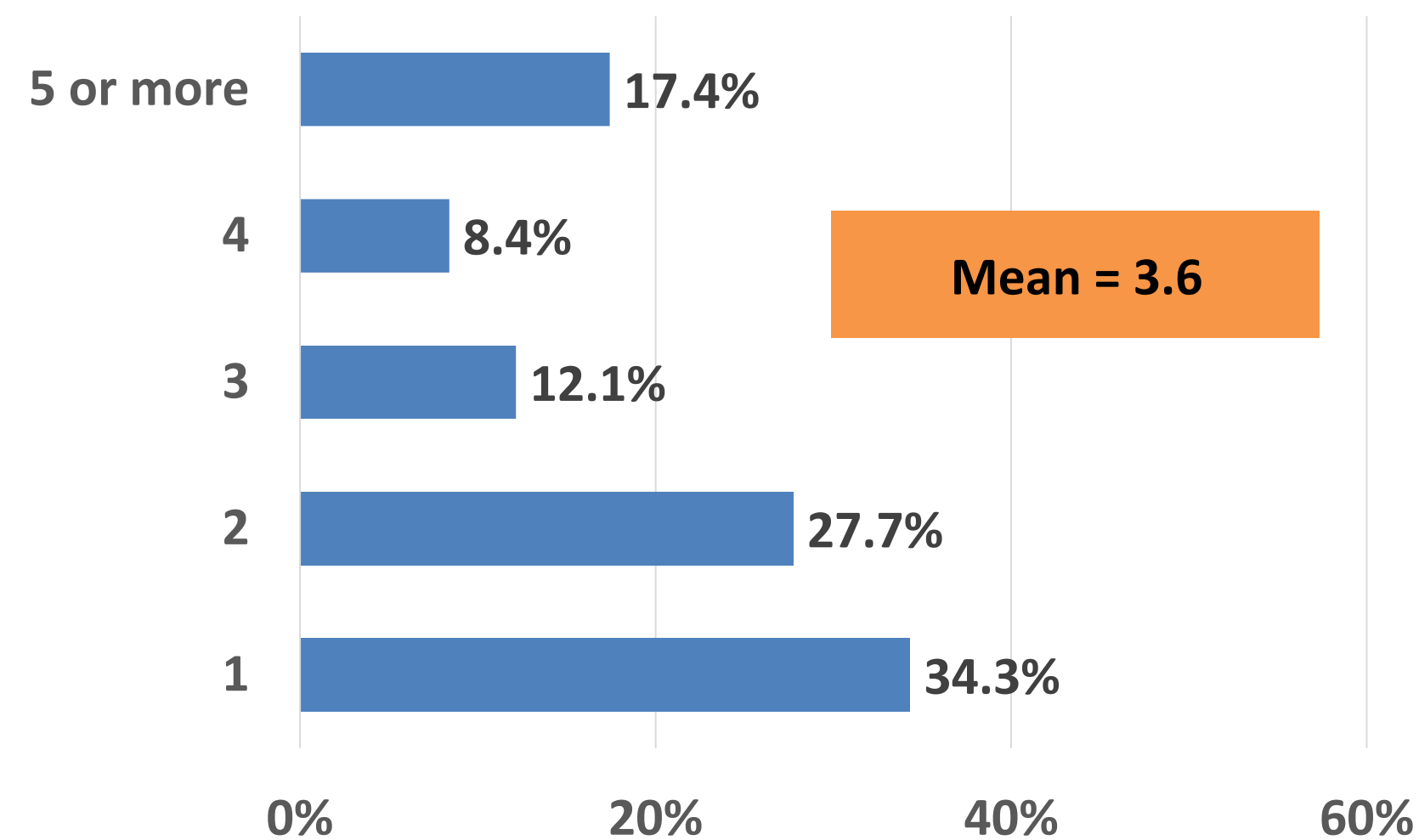
Question: Is this your first visit to the Napa Valley?  
 Base: All respondents. 1736 responses.



# Visits to the Napa Valley in Past Twelve Months

The average repeat visitor surveyed has made 3.6 trips to the Napa Valley in the last year. Amongst the visitors in this group, one-third (34.3%) have taken only one trip to the Napa Valley in the past year, while the remaining 65.7 percent have taken two or more trips. The typical Napa Valley day-trip visitor has taken 4.2 trips to the area in the past year.

Chart 20b: Number of Trips to the Napa Valley



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
5 or more	8.2%	6.3%	19.7%	21.6%
4	5.7%	12.6%	15.1%	9.1%
3	14.4%	6.3%	5.0%	11.7%
2	30.2%	25.2%	10.0%	27.5%
1	41.4%	49.6%	50.2%	30.1%
<b>Mean</b>	<b>2.4</b>	<b>2.0</b>	<b>2.8</b>	<b>4.2</b>
Base	222	11	26	543

Question: Including this trip, how many visits to the Napa Valley have you made in the past twelve (12) months? Base: All repeat visitors to the Napa Valley. 802 responses.

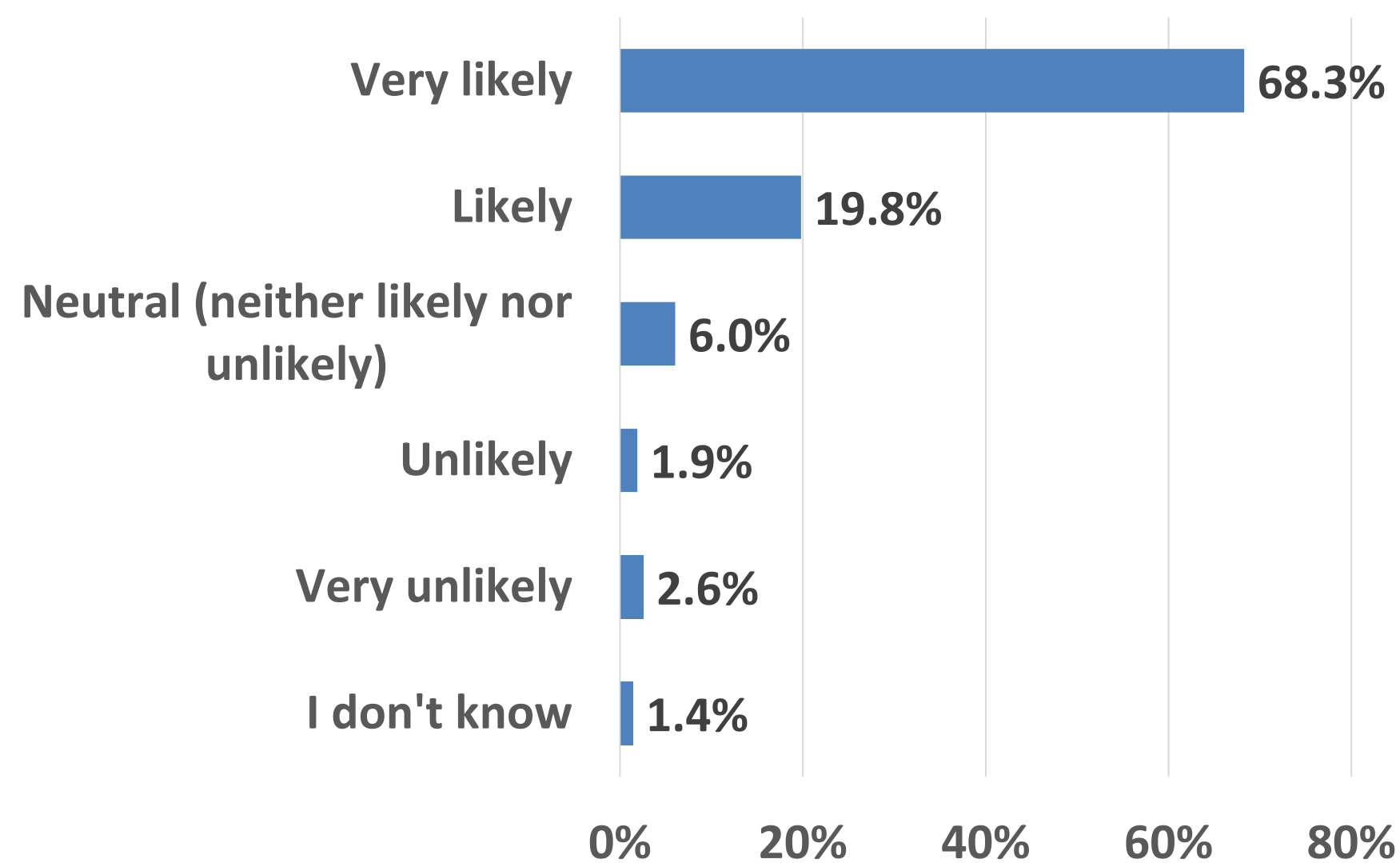


# Likelihood to Return to the Napa Valley

Indicative of a satisfactory visitor experience, nearly all visitors surveyed reported being highly likely to return to the Napa Valley. In total, 68.3 percent of respondents said they were “very likely” to visit the Napa Valley again and an additional 19.8 percent said they were “likely” to return.

Chart 21: Likelihood to Return to the Napa Valley

Detail by Type of Visitor



	Lodging Guest	Home Share Rental	VFR	Day-Trip
Very likely	64.5%	75.9%	71.4%	69.7%
Likely	24.0%	20.6%	21.0%	17.6%
Neutral (neither likely nor unlikely)	5.7%	0.0%	3.8%	6.5%
Unlikely	1.6%	1.7%	0.0%	2.1%
Very unlikely	2.8%	1.7%	1.9%	2.5%
I don't know	1.3%	0.0%	1.9%	1.5%
Base	513	40	69	1127

Question: How likely are you to return to the Napa Valley?  
 Base: All respondents. 1749 responses.



# Non-Hotel Visitors – Motivators to Stay in a Napa Valley Hotel

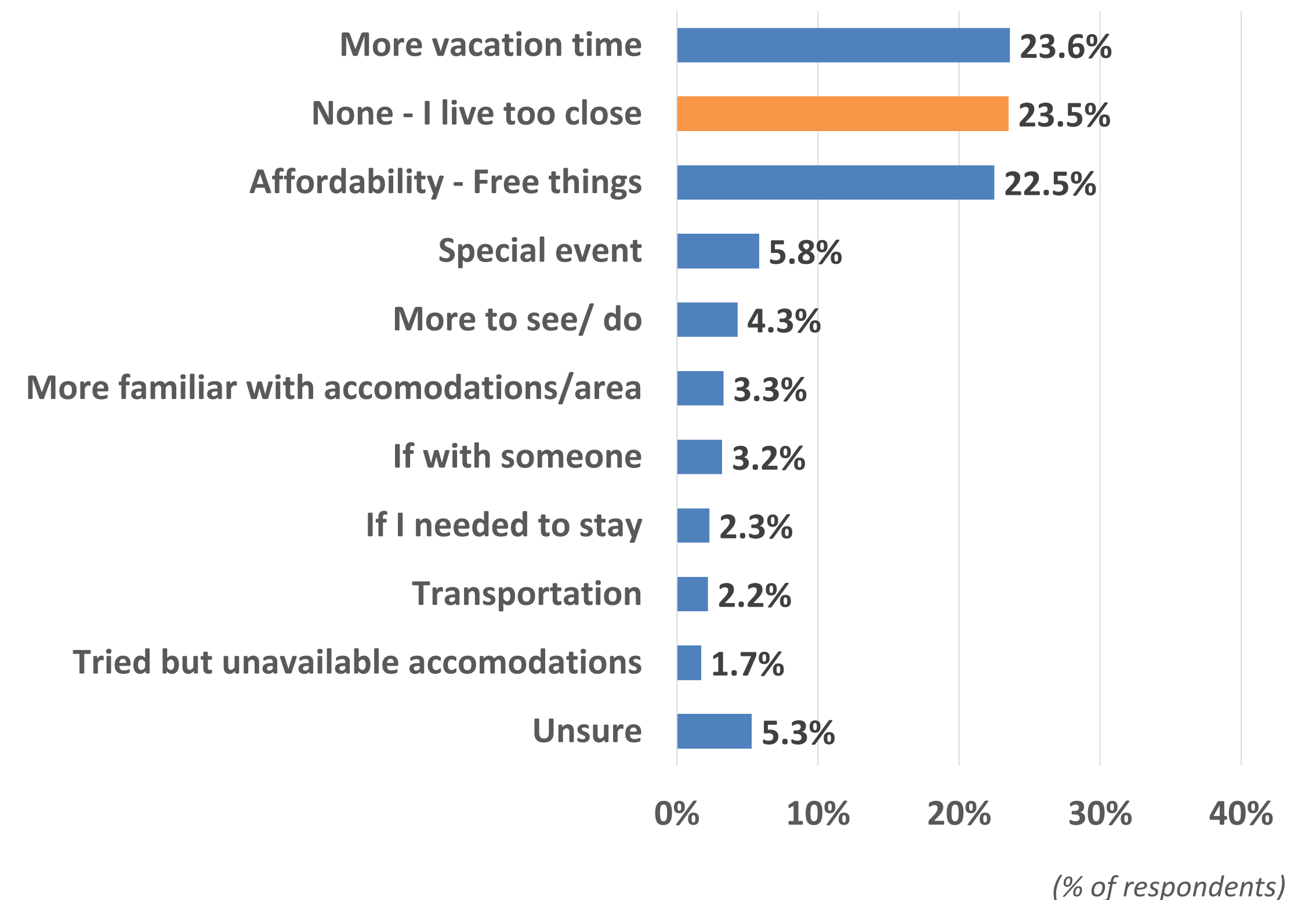
Just under a quarter of visitors who did not stay overnight in a Napa Valley lodging property said there was nothing that would motivate them to stay overnight in an area hotel because they live too close to the destination (23.5%).

Day-trip visitors, VFRs and home share renters were asked what would have motivated them to stay overnight in a Napa Valley hotel on this trip. For the portion that felt they could be influenced, the top cited motivators were more vacation time (23.6%) and affordability or free giveaways (22.5%).

Additionally, approximately 5.0 percent this group also said they could be motivated to stay in a Napa Valley hotel for a special event (5.8%) and/or if there were more to see/do (4.3%).

Question: What would have motivated you to stay overnight in a Napa Valley hotel on this trip? (VERBATIM RESPONSE) Base: Respondents who did not stay overnight in a Napa Valley lodging property. 847 responses.

Chart 22: Non-Hotel Visitors – Motivators to Stay in a Napa Valley Hotel





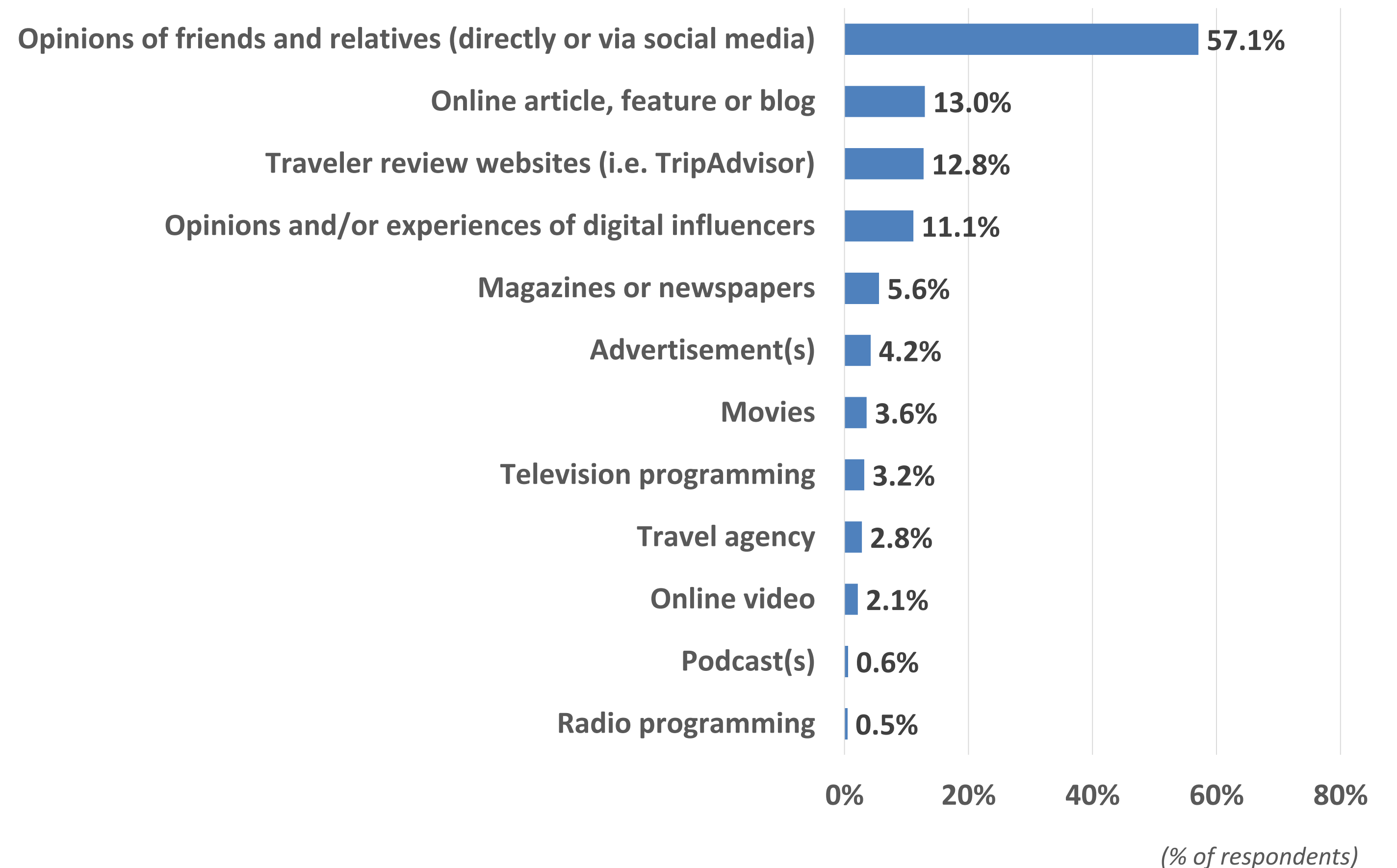
# Important Factors Inspiring a Trip to the Napa Valley

Opinions of friends/relatives, either directly or via social media, was the top influencing factor motivating visitors to come to the Napa Valley. In fact, nearly six-in-ten respondents said the opinions of their friends/family inspired their trip to the area (57.1%). Other top factors that inspired visitors' trips to the Napa Valley area include online articles, features or blogs (13.0%), traveler review websites (12.8%) and the opinions/experiences of digital influencers (11.1%).

*Full detail on factors tested and segmented by type of visitor are presented on the next page.*

Question: Which of the following—if any—inspired this visit to Napa Valley? (SELECT ALL THAT APPLY) Base: All respondents. 1868 responses.

Chart 23: Important Factors Inspiring a Trip to the Napa Valley





# Important Factors Inspiring a Trip to the Napa Valley – Complete Detail

## Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Opinions of friends and relatives (directly or via social media)	52.4%	57.3%	63.1%	58.9%
Online article, feature or blog	10.5%	21.2%	15.2%	13.7%
Traveler review websites (i.e. TripAdvisor)	16.3%	22.7%	5.5%	11.5%
Opinions and/or experiences of digital influencers	10.3%	24.5%	23.2%	10.2%
Magazines or newspapers	6.5%	11.5%	4.8%	4.9%
Advertisement(s)	5.2%	6.4%	3.2%	3.7%
Movies	4.0%	1.6%	1.6%	3.5%
Television programming	2.8%	8.2%	0.0%	3.4%
Travel agency	2.9%	3.3%	1.6%	2.8%
Online video	1.6%	1.6%	3.2%	2.3%
Podcast(s)	0.5%	0.0%	0.0%	0.7%
Radio programming	0.1%	0.0%	1.6%	0.5%
Base	536	42	83	1204

**Question:** Which of the following—if any—inspired this visit to Napa Valley? (SELECT ALL THAT APPLY)

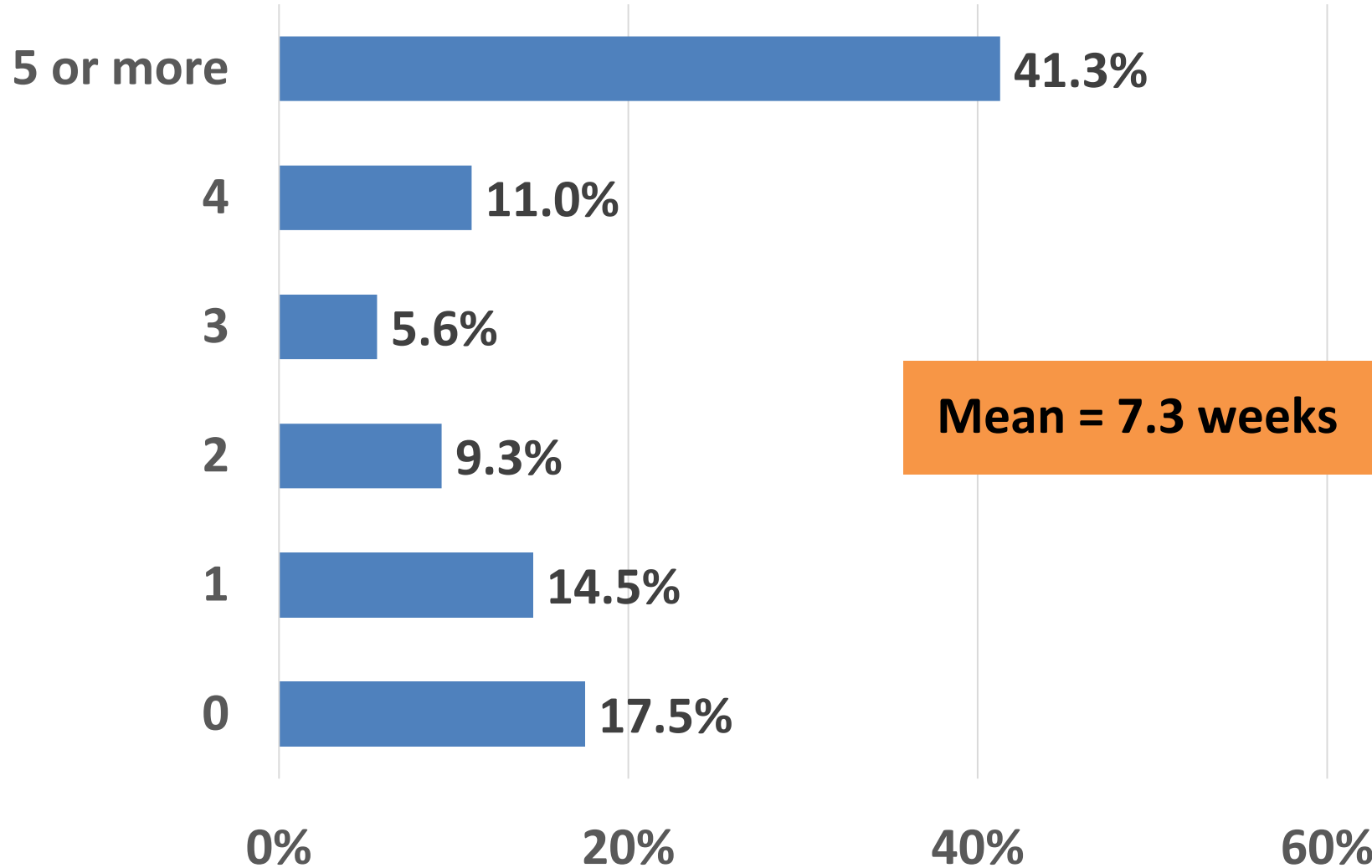
**Base:** All Respondents. 1865 responses.



# Weeks of Advance Trip Planning

The typical Napa Valley visitor started planning their trip 7.3 weeks in advance of their travel dates. Lodging guests reported a longer travel planning window, averaging 10.0 weeks in advance, while day trippers started planning their trip 5.6 weeks in advance.

Chart 24: Weeks of Advance Trip Planning



Detail by Type of Visitor

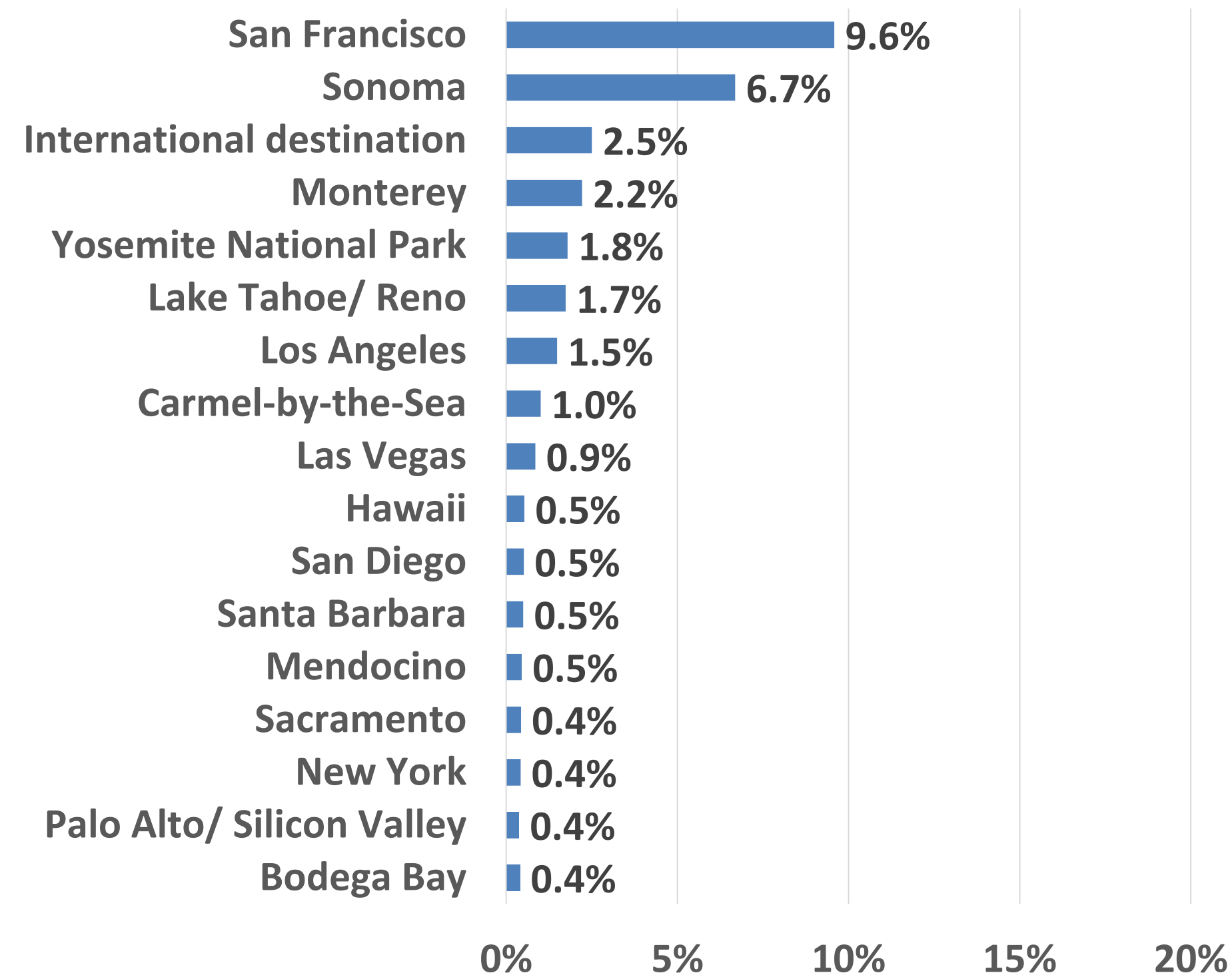
	Lodging Guest	Home Share Rental	VFR	Day-Trip
5 or more	59.1%	66.7%	58.8%	31.4%
4	11.9%	8.8%	12.4%	10.5%
3	7.6%	10.6%	7.1%	4.5%
2	7.7%	3.5%	7.1%	10.3%
1	6.4%	5.3%	12.4%	18.7%
0	6.9%	5.1%	2.1%	23.7%
<b>Mean (in weeks)</b>	<b>10.0</b>	<b>16.0</b>	<b>11.1</b>	<b>5.6</b>
Base	492	39	64	1077

Question: Approximately how many weeks in advance did you begin planning this trip to the Napa Valley? Base: All respondents. 1672 responses.

# Other Destinations Considered for this Trip

A large majority of visitors surveyed did not consider any other destinations instead of the Napa Valley (69.2%). However, for those who did consider other destinations to visit the top cited were San Francisco (9.6%) or Sonoma (6.7%). In total, 2.5 percent of lodging guests said they had considered visiting an international destination instead of the Napa Valley.

Chart 25: Other Destinations Considered for this Trip



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
San Francisco	7.4%	4.7%	8.0%	10.9%
Sonoma	8.9%	6.6%	4.8%	5.7%
International destination	5.2%	1.6%	1.6%	1.4%
Monterey	1.8%	1.6%	0.0%	2.6%
Yosemite National Park	1.2%	3.3%	0.0%	2.1%
Lake Tahoe/ Reno	2.3%	1.6%	1.6%	1.4%
Los Angeles	2.0%	0.0%	1.6%	1.3%
Carmel-by-the-Sea	1.9%	0.0%	0.0%	0.7%
Las Vegas	1.1%	0.0%	0.0%	0.8%
Hawaii	0.7%	1.6%	0.0%	0.5%
San Diego	0.8%	3.3%	4.8%	0.0%
Santa Barbara	0.7%	0.0%	0.0%	0.5%
Mendocino	0.0%	0.0%	0.0%	0.7%
Sacramento	0.5%	0.0%	0.0%	0.5%
New York	0.7%	0.0%	0.0%	0.4%
Bodega Bay	0.3%	0.0%	0.0%	0.5%
Palo Alto/ Silicon Valley	0.0%	0.0%	0.0%	0.6%
Base	536	42	83	1204

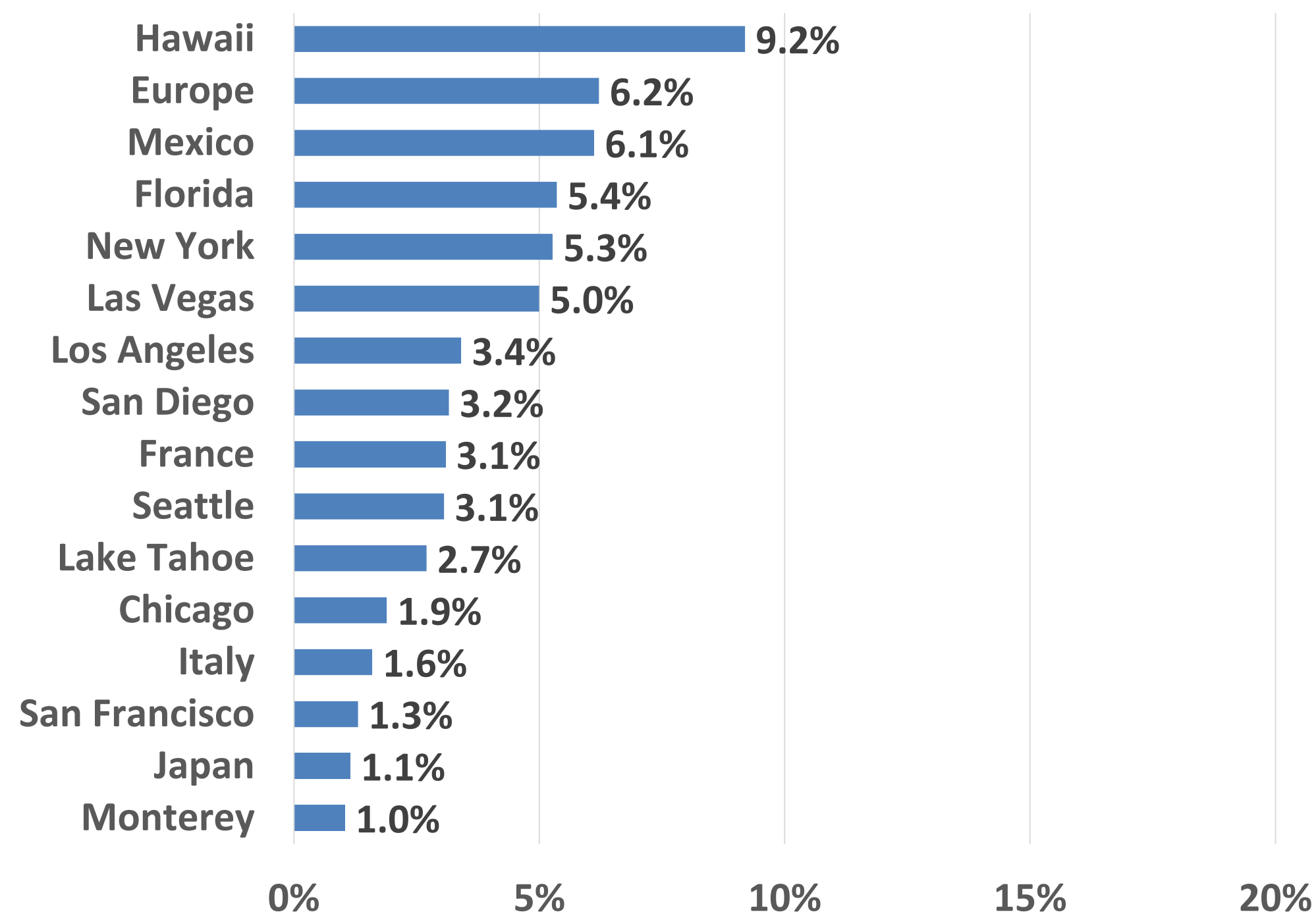
Question: What other destinations did you consider visiting for this trip instead of Napa Valley?  
(VERBATIM RESPONSE) Base: All respondents. 1865 responses.



# Other Destinations Visited in the Past Two Years

Hawaii (9.2%), Europe (6.2%), Mexico (6.1%), Florida (5.4%), New York (5.3%) and Las Vegas (5.0%) were the top destinations Napa Valley visitors have taken a leisure trip to in the past two years. Respondents were asked, in an open-ended format, which destinations they have visited in the past two years for leisure. The chart and table below list the top cited responses by all visitors.

**Chart 26: Other Destinations Visited in the Past Two Years**



Question: Thinking specifically of the vacations and getaways you have taken in the last two (2) years, which destinations have you visited on these types of trips? (VERBATIM RESPONSE)  
 Base: All respondents. 1865 responses.

**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Hawaii	6.9%	6.6%	9.6%	10.3%
Europe	7.2%	6.6%	1.6%	6.1%
Mexico	7.3%	1.6%	8.7%	5.6%
Florida	7.7%	4.9%	4.8%	4.3%
New York	5.4%	11.3%	4.8%	5.0%
Las Vegas	5.4%	3.3%	9.6%	4.6%
Los Angeles	2.1%	0.0%	0.0%	4.3%
San Diego	3.4%	6.6%	0.0%	3.2%
France	3.5%	11.3%	6.4%	2.3%
Seattle	2.3%	0.0%	1.6%	3.6%
Lake Tahoe	1.8%	0.0%	1.6%	3.3%
Chicago	1.5%	1.6%	0.0%	2.2%
Italy	2.1%	0.0%	0.7%	1.5%
San Francisco	2.7%	1.4%	0.0%	0.8%
Japan	0.9%	1.6%	3.2%	1.1%
Monterey	1.0%	0.0%	1.6%	1.1%
Base	536	42	83	1204





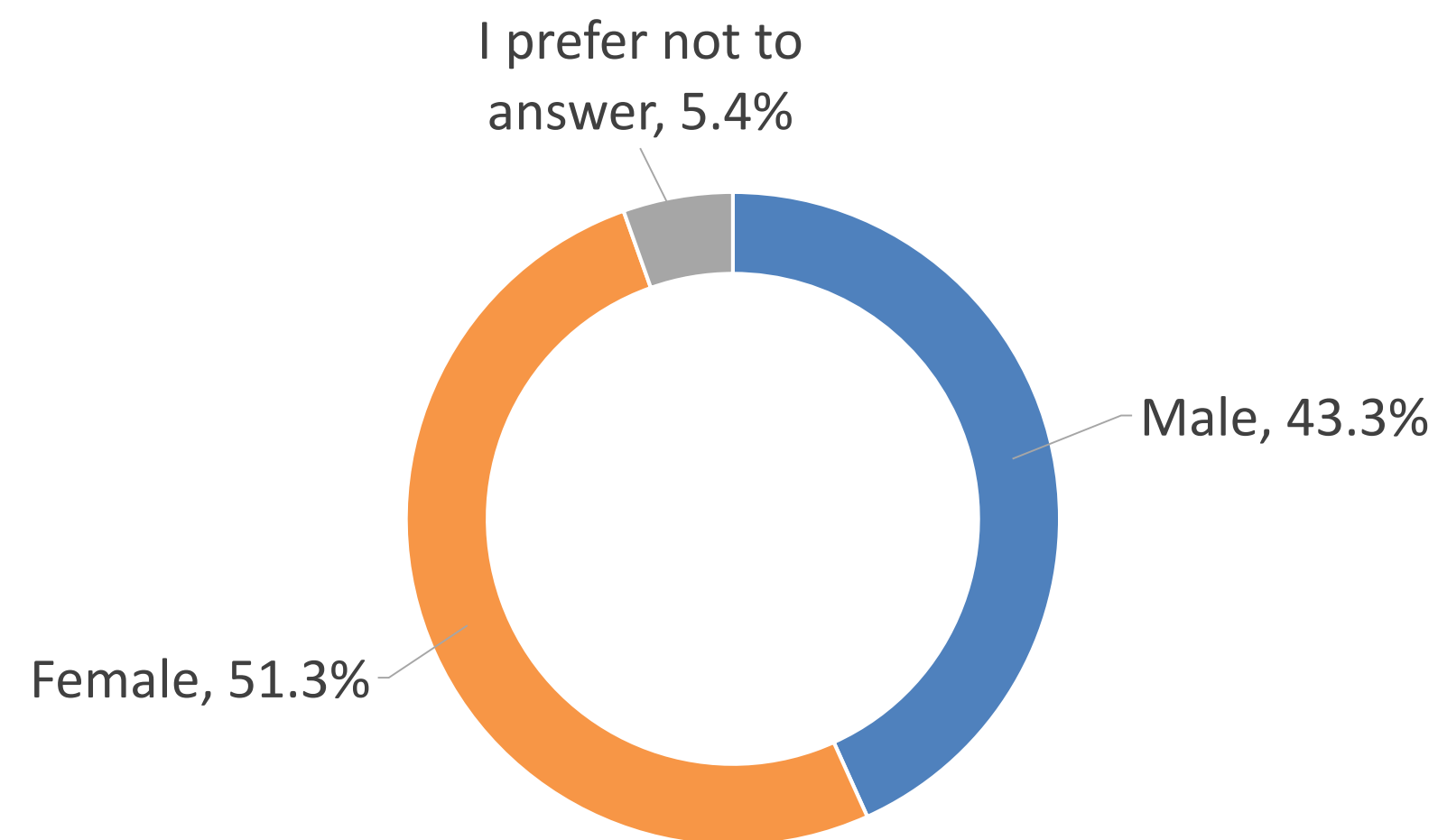
# DEMOGRAPHICS



# Gender

**The survey sample skewed slightly female.** In total, 51.3 percent of respondents were female and 43.3 percent were male. It should be noted that this data reflects the proportion of persons actually completing the survey, not the composition of visitors by gender. For a more representative view of the gender mix of Napa visitors, please refer to page 32.

**Chart 27: Gender**



**Detail by Type of Visitor**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Male	42.1%	50.8%	36.9%	44.0%
Female	53.3%	49.2%	56.8%	50.0%
I prefer not to answer	4.6%	0.0%	6.2%	6.0%
Base	516	39	73	1134

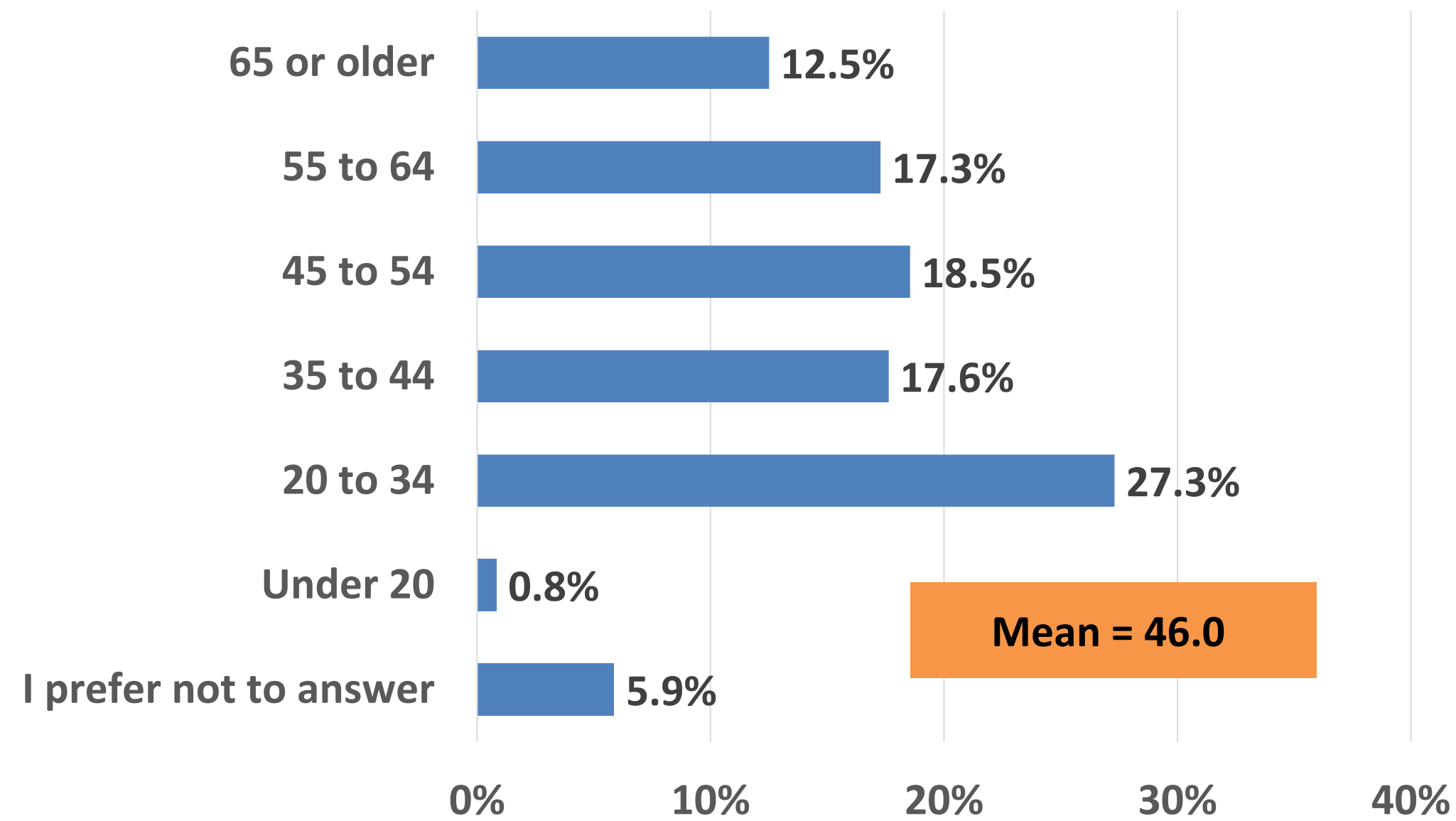
Question: What is your gender? Base: All respondents. 1762 responses



# Age

The average age of visitors surveyed was 46.0 years. Home share rental guests and day trippers were the youngest visitor segments comparatively, with an average age of 44.1 and 44.7 years, respectively.

Chart 28: Age



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
65 or older	16.4%	22.7%	12.6%	10.4%
55 to 64	22.4%	8.6%	27.9%	14.6%
45 to 54	18.1%	17.7%	19.9%	18.6%
35 to 44	17.6%	8.6%	15.3%	18.3%
20 to 34	21.7%	40.6%	18.1%	29.9%
Under 20	0.0%	0.0%	0.0%	1.3%
I prefer not to answer	3.9%	1.8%	6.2%	6.9%
<b>Mean</b>	<b>48.6</b>	<b>44.1</b>	<b>50.2</b>	<b>44.7</b>
<b>Base</b>	<b>516</b>	<b>39</b>	<b>73</b>	<b>1127</b>

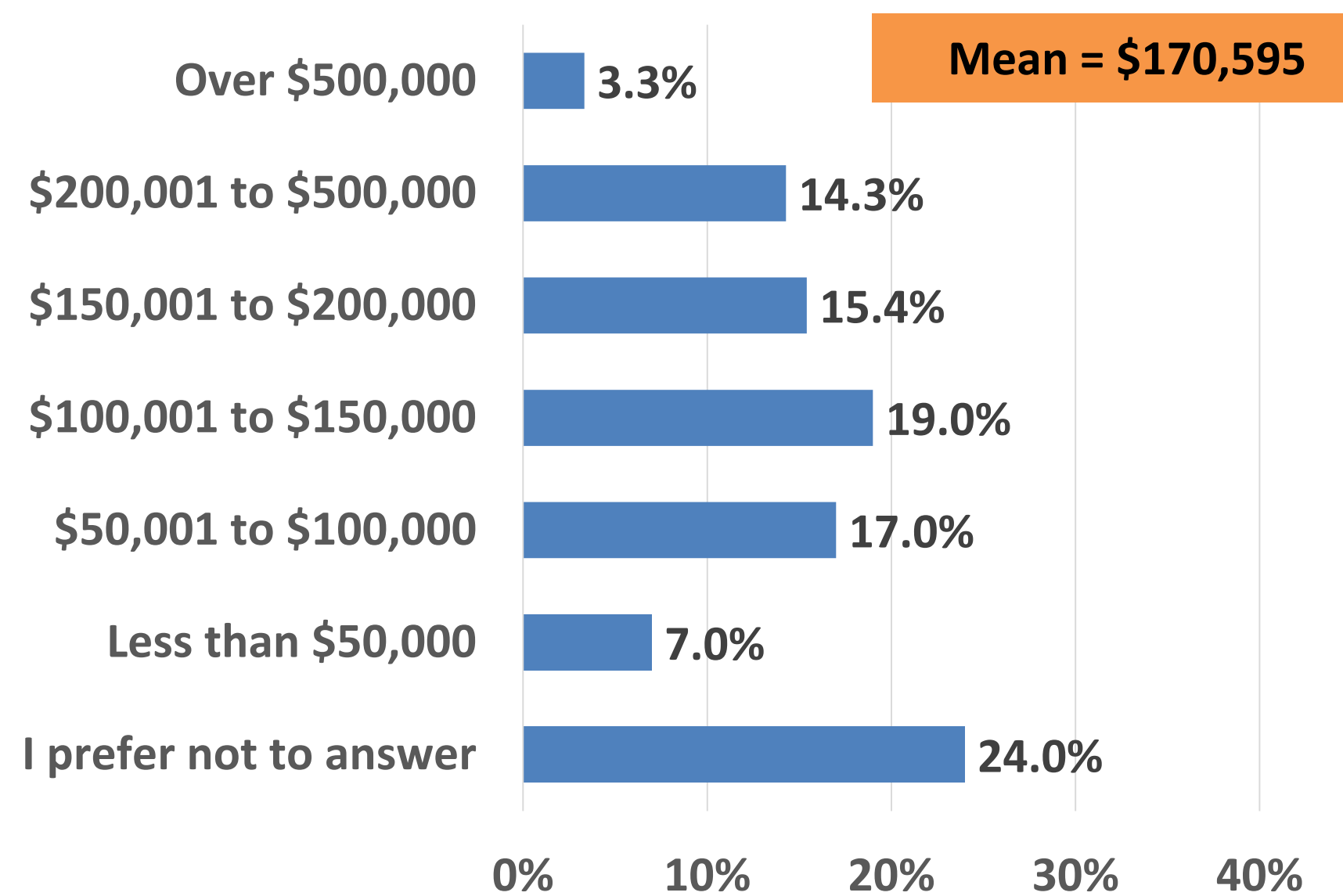
Question: What best describes your age? (Select one) Base: All respondents. 1755 responses.



# Annual Household Income

Visitors to the Napa Valley are affluent, with an average annual household income of \$170,595. Lodging guests reported the highest average household income compared to the other visitor segments (\$204,881).

Chart 29: Annual Household Income



Detail by Type of Visitor

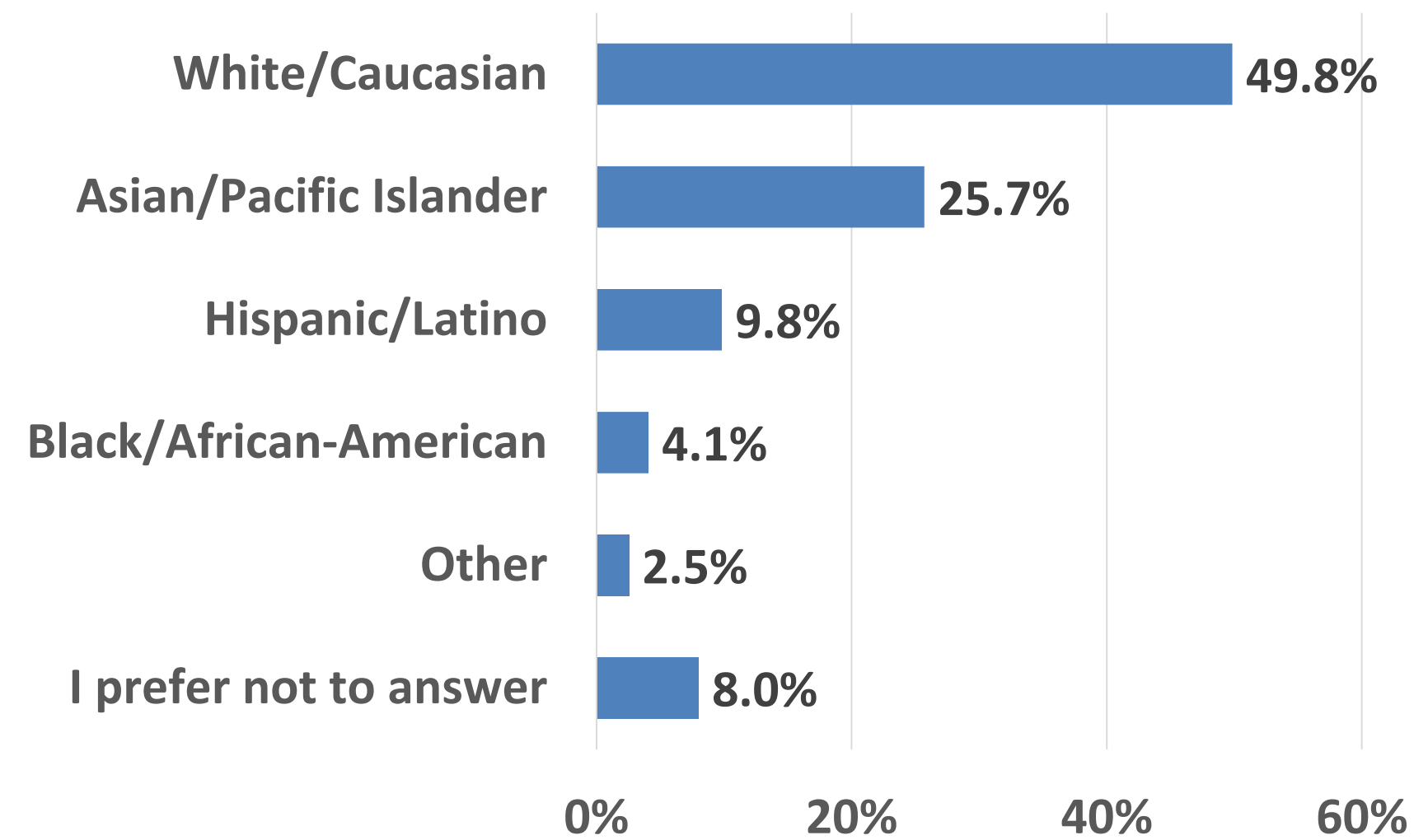
	Lodging Guest	Home Share Rental	VFR	Day-Trip
Less than \$50,000	3.6%	7.2%	3.6%	8.8%
\$50,001 to \$100,000	14.9%	17.7%	13.5%	18.3%
\$100,001 to \$150,000	18.8%	21.6%	18.1%	18.9%
\$150,001 to \$200,000	15.6%	18.0%	9.9%	15.7%
\$200,001 to \$500,000	18.3%	21.3%	7.2%	12.7%
Over \$500,000	6.5%	3.6%	3.6%	1.9%
I prefer not to answer	22.2%	10.6%	44.2%	23.8%
<b>Mean</b>	<b>\$204,881</b>	<b>\$175,807</b>	<b>\$166,822</b>	<b>\$155,799</b>
Base	514	39	73	1125

Question: Which best describes the combined annual income of all members of your household?  
 Base: All respondents 1751 responses.

# Ethnicity

While half of the Napa Valley visitors surveyed identified as Caucasian (49.8%), 50.2 percent identified as other ethnicities. The largest non-Caucasian visitor groups were Asian/Pacific Islander (25.7%) and Hispanic/Latino (9.8%). Interestingly, day-trip visitors were more likely to be ethnically diverse compared to overnight visitors.

Chart 30: Ethnicity



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
White/Caucasian	64.7%	73.3%	61.7%	41.7%
Asian/Pacific Islander	12.1%	12.4%	15.0%	33.1%
Hispanic/Latino	7.5%	7.2%	11.2%	10.8%
Black/African-American	3.9%	0.0%	1.9%	4.4%
Other	3.3%	1.8%	1.9%	2.3%
I prefer not to answer	8.5%	5.4%	8.4%	7.8%
Base	514	39	71	1124

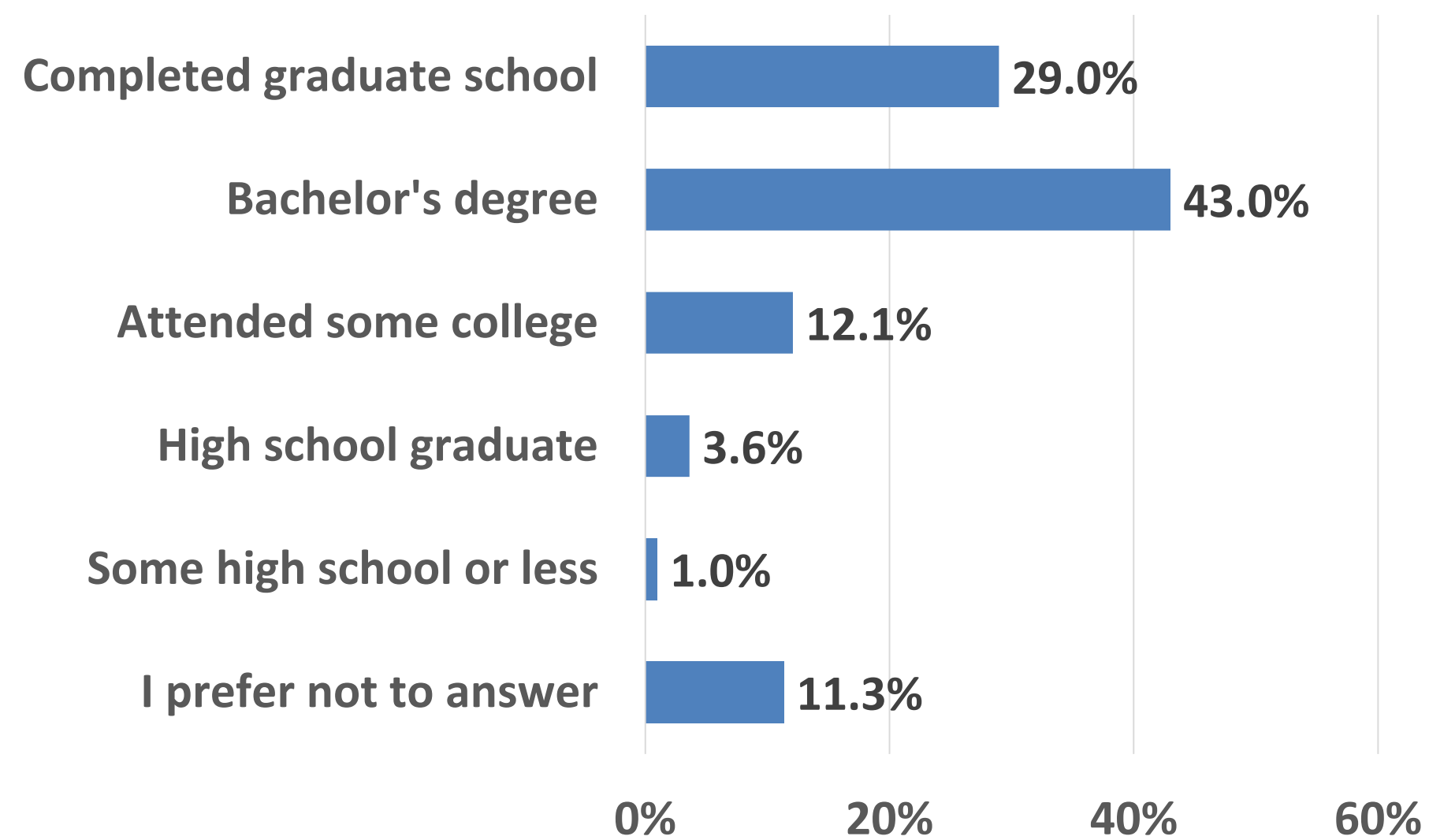
Question: Which best describes your race or ethnic background?  
 Base: All respondents. 1748 responses.



# Education

The Napa Valley visitors are highly educated. Nearly two-thirds of visitors surveyed hold a bachelor’s degree (72.0%), including 29.0 percent who have completed graduate school.

Chart 31: Education



Detail by Type of Visitor

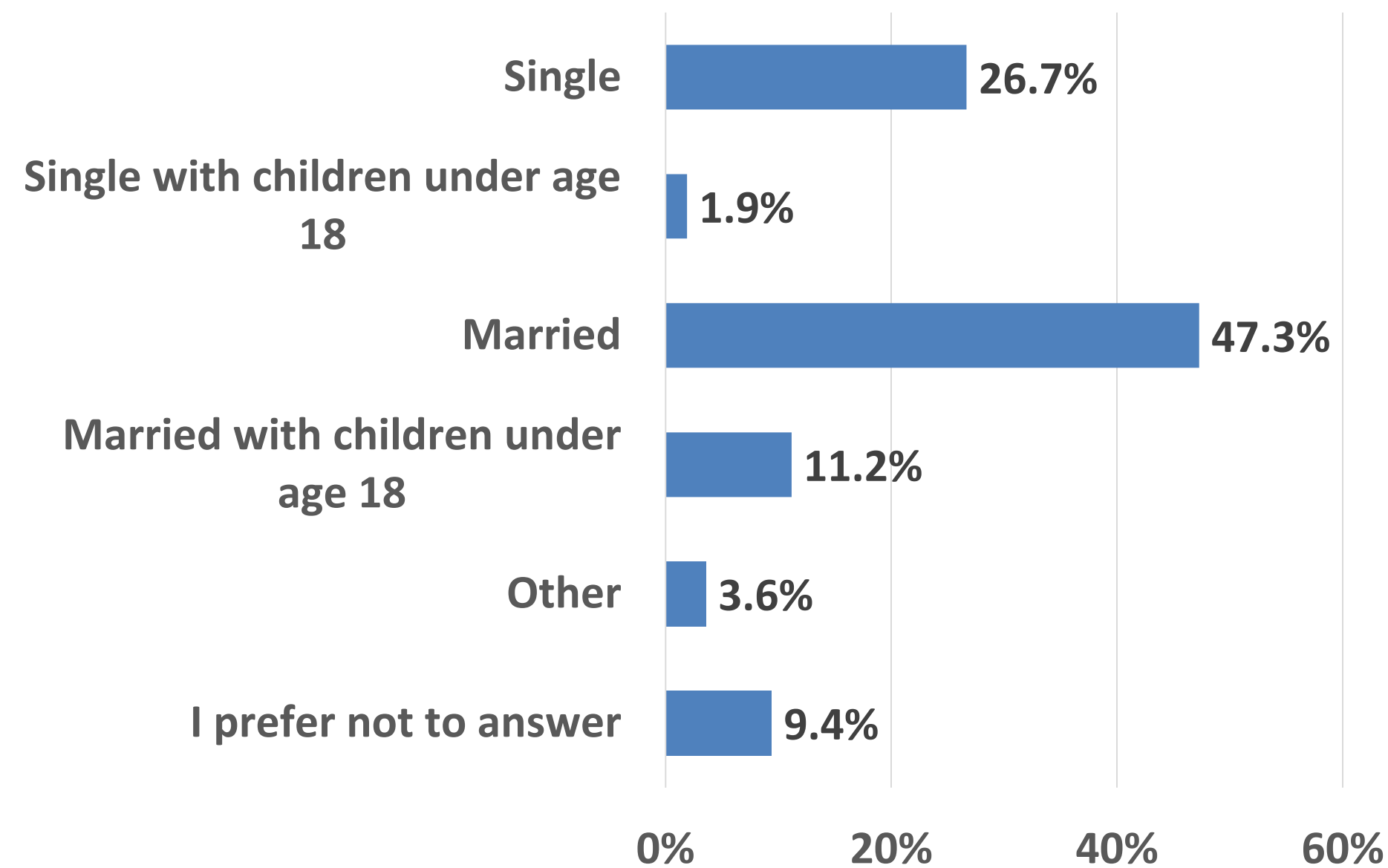
	Lodging Guest	Home Share Rental	VFR	Day-Trip
Completed graduate school	34.8%	47.2%	22.5%	26.2%
Bachelor's degree	41.7%	40.4%	44.2%	43.8%
Attended some college	10.2%	7.1%	9.0%	13.1%
High school graduate	3.4%	0.0%	10.8%	3.4%
Some high school or less	1.1%	1.8%	0.0%	1.0%
I prefer not to answer	8.8%	3.5%	13.5%	12.5%
Base	514	39	73	1129

Question: Which of the following best represents the highest level of formal education you have completed? Base: All respondents. 1755 responses.

# Marital Status

In total, 58.4 percent of the Napa Valley visitors surveyed were married, while 28.6 percent were single. Fully, 13.1 percent of respondents reported having children under the age of 18.

Chart 32: Marital Status



Detail by Type of Visitor

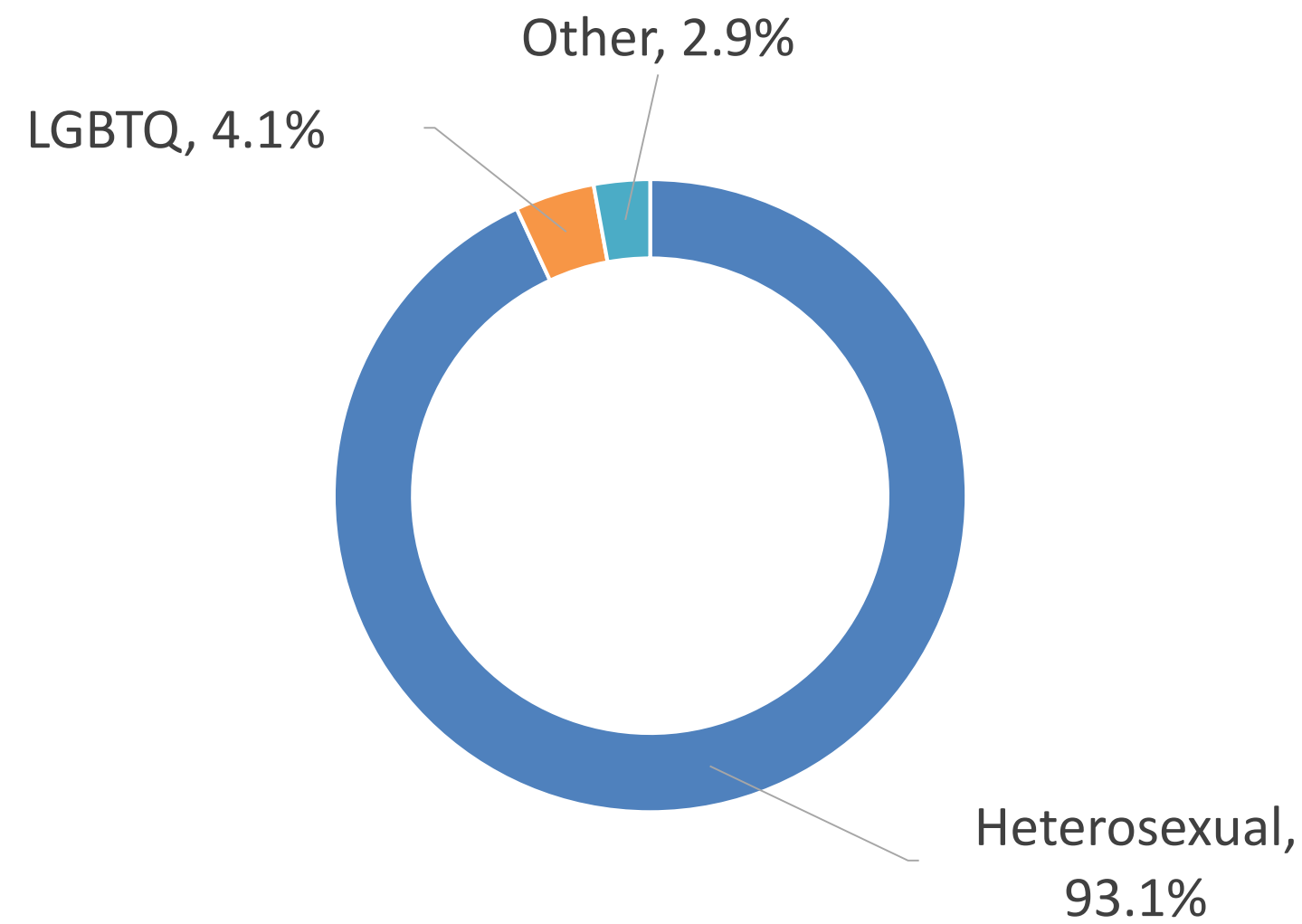
	Lodging Guest	Home Share Rental	VFR	Day-Trip
Single	15.6%	31.8%	23.5%	31.8%
Single with children under age 18	2.1%	0.0%	3.6%	1.8%
Married	57.8%	56.1%	44.2%	42.4%
Married with children under age 18	13.3%	8.6%	15.3%	10.2%
Other	4.7%	0.0%	0.0%	3.4%
I prefer not to answer	6.5%	3.5%	13.5%	10.5%
Base	514	39	73	1125

Question: Which best describes your marital status? Base: All respondents. 1751 responses.



A majority of survey respondents who visited the Napa Valley identified as heterosexual (93.1%), while 4.1 percent identified as LGBTQ.

Chart 33: LGBTQ



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Heterosexual	94.5%	92.4%	100.0%	92.0%
LGBTQ	3.7%	7.6%	0.0%	4.4%
Other	1.9%	0.0%	0.0%	3.6%
Base	447	37	61	931

Question: Which best describes you? Base: All respondents. 1476 responses.





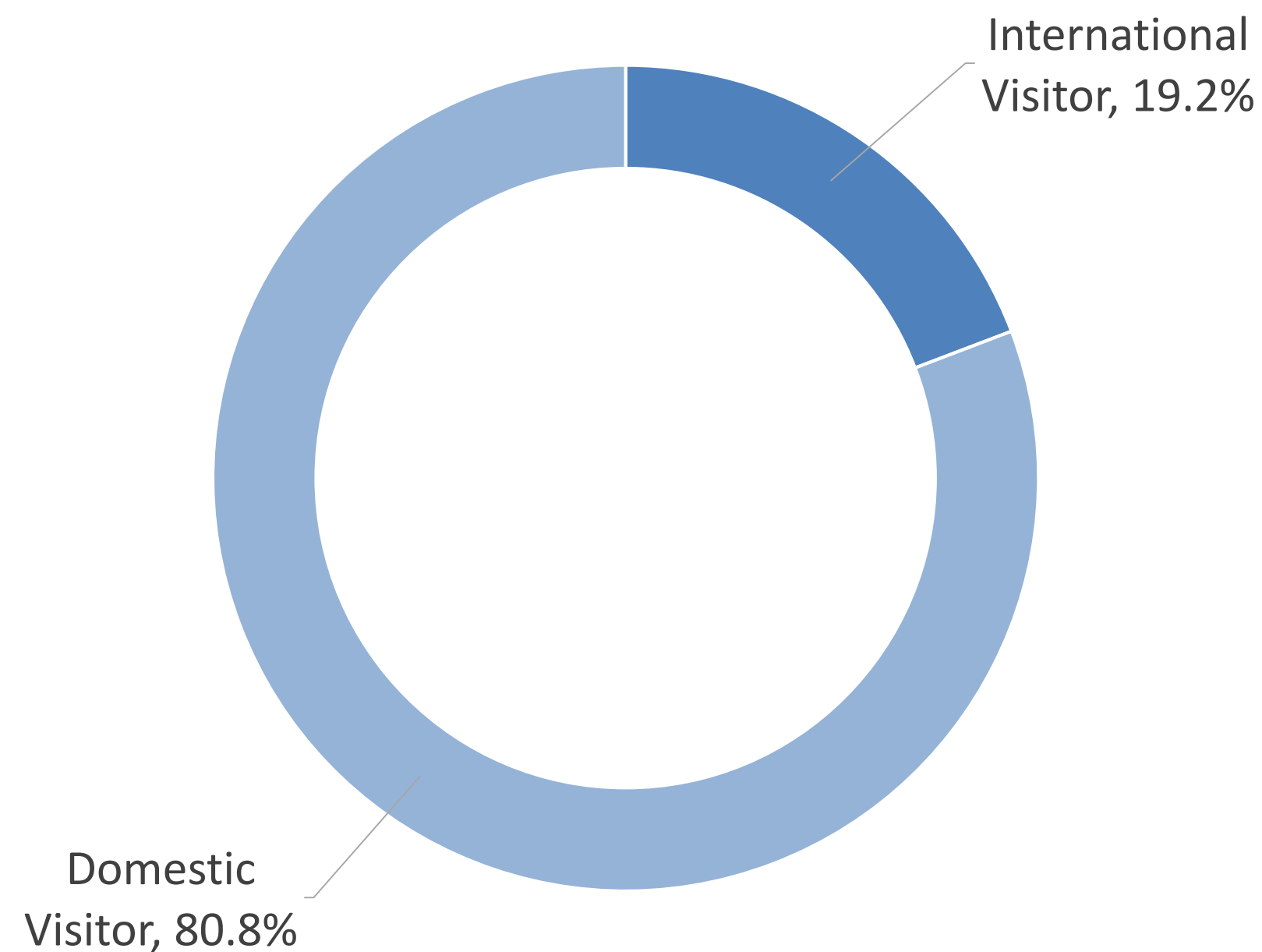
# POINT OF ORIGIN



# Country of Residence

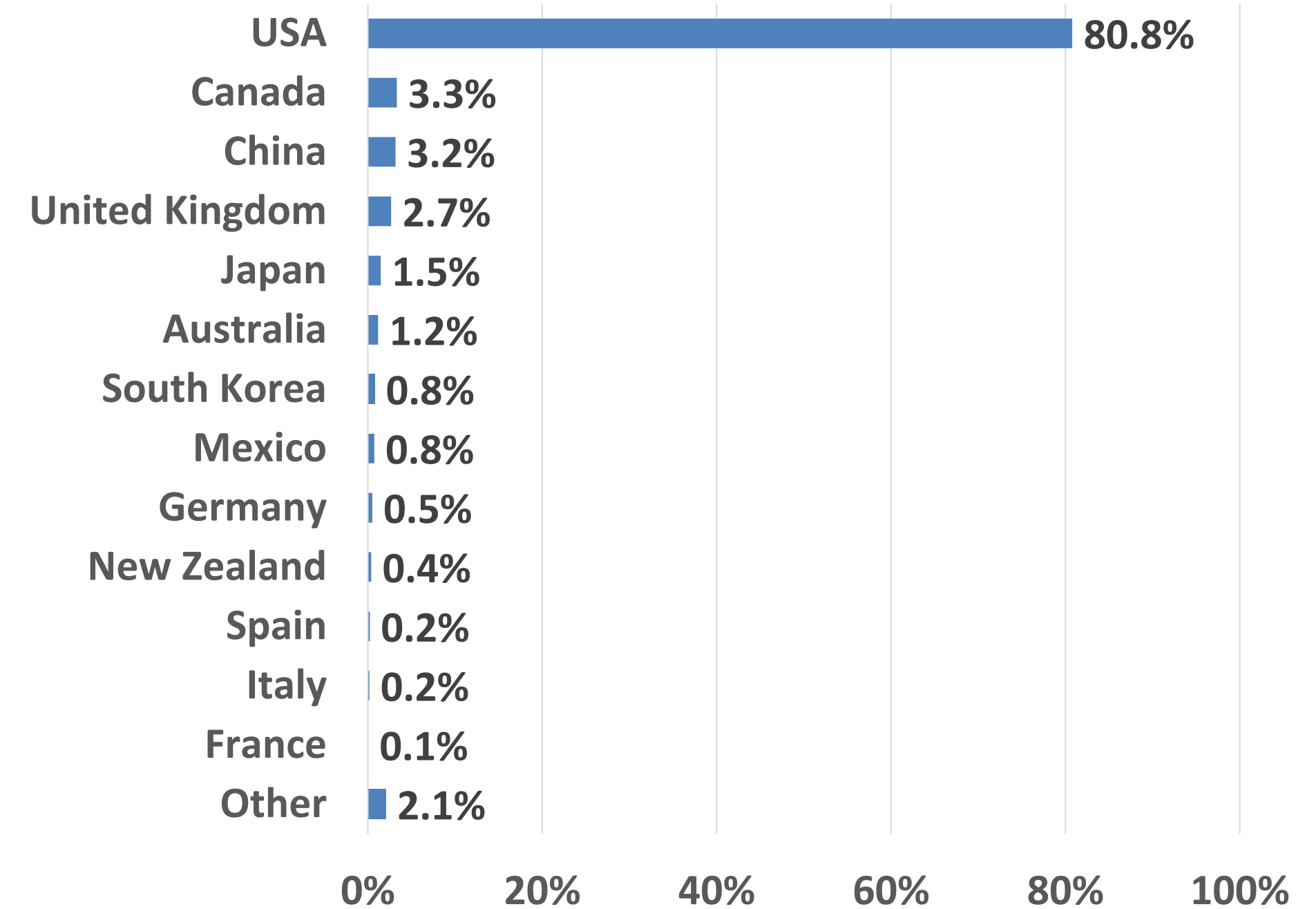
In total, 80.8 percent of visitors surveyed were domestic residents and 19.2 percent were international. The top international markets represented in the sample were Canada (17.7%), China (17.0%) and the United Kingdom (14.3%).

Figure 34: US vs. International Visitors



Question: Where do you currently live? Base: All respondents. 1852 responses.

Chart 35: Top Countries of Residence

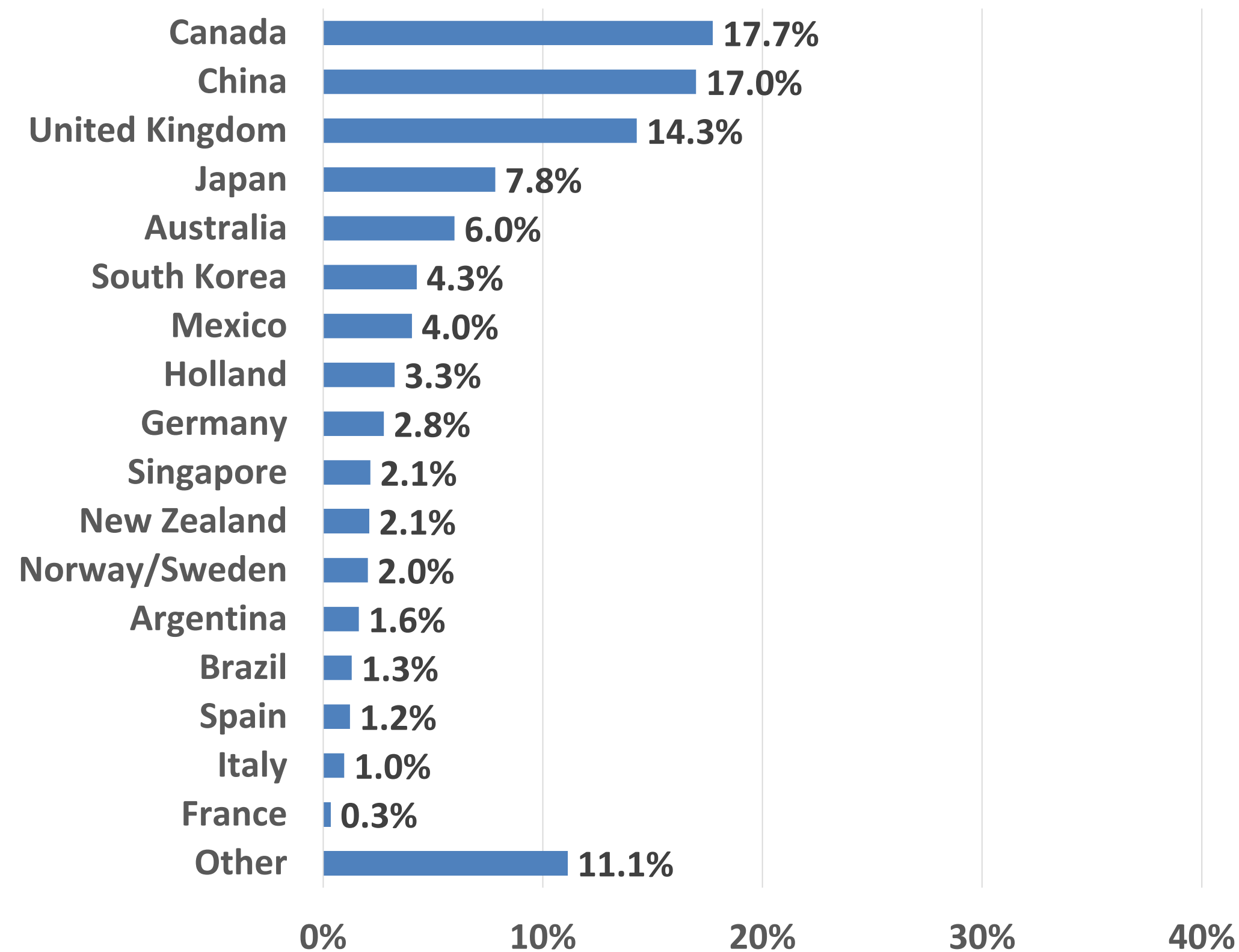


Question: In which country do you live? Base: All respondents. 1852 responses.

# International Visitor: Country of Residence – Full Data by Place of Stay

The table and chart below show the country of origin breakdown for all international visitors surveyed (excludes all domestic respondents).

**Chart 35: Top Countries of Residence**



**Detail by Place of Stay**

	Lodging Guest	Home Share Rental	VFR	Day-Trip
Canada	21.4%	17.6%	15.4%	16.9%
China	11.6%	35.3%	23.1%	16.9%
United Kingdom	16.1%	29.4%	7.7%	13.6%
Japan	8.9%	0.0%	0.0%	8.5%
Australia	9.8%	0.0%	0.0%	5.6%
South Korea	0.0%	5.9%	0.0%	5.6%
Mexico	6.3%	0.0%	7.7%	3.4%
Holland	0.0%	0.0%	0.0%	4.5%
Germany	1.8%	0.0%	7.7%	2.8%
Singapore	2.7%	0.0%	0.0%	2.3%
New Zealand	2.7%	0.0%	15.4%	1.1%
Norway/Sweden	0.0%	0.0%	0.0%	2.8%
Argentina	0.0%	0.0%	0.0%	2.3%
Brazil	3.6%	5.9%	0.0%	0.6%
Spain	0.0%	0.0%	0.0%	1.7%
Italy	0.9%	0.0%	7.7%	0.6%
France	1.8%	0.0%	0.0%	0.0%
Other	12.5%	5.9%	15.4%	10.7%
Base	68	12	17	250

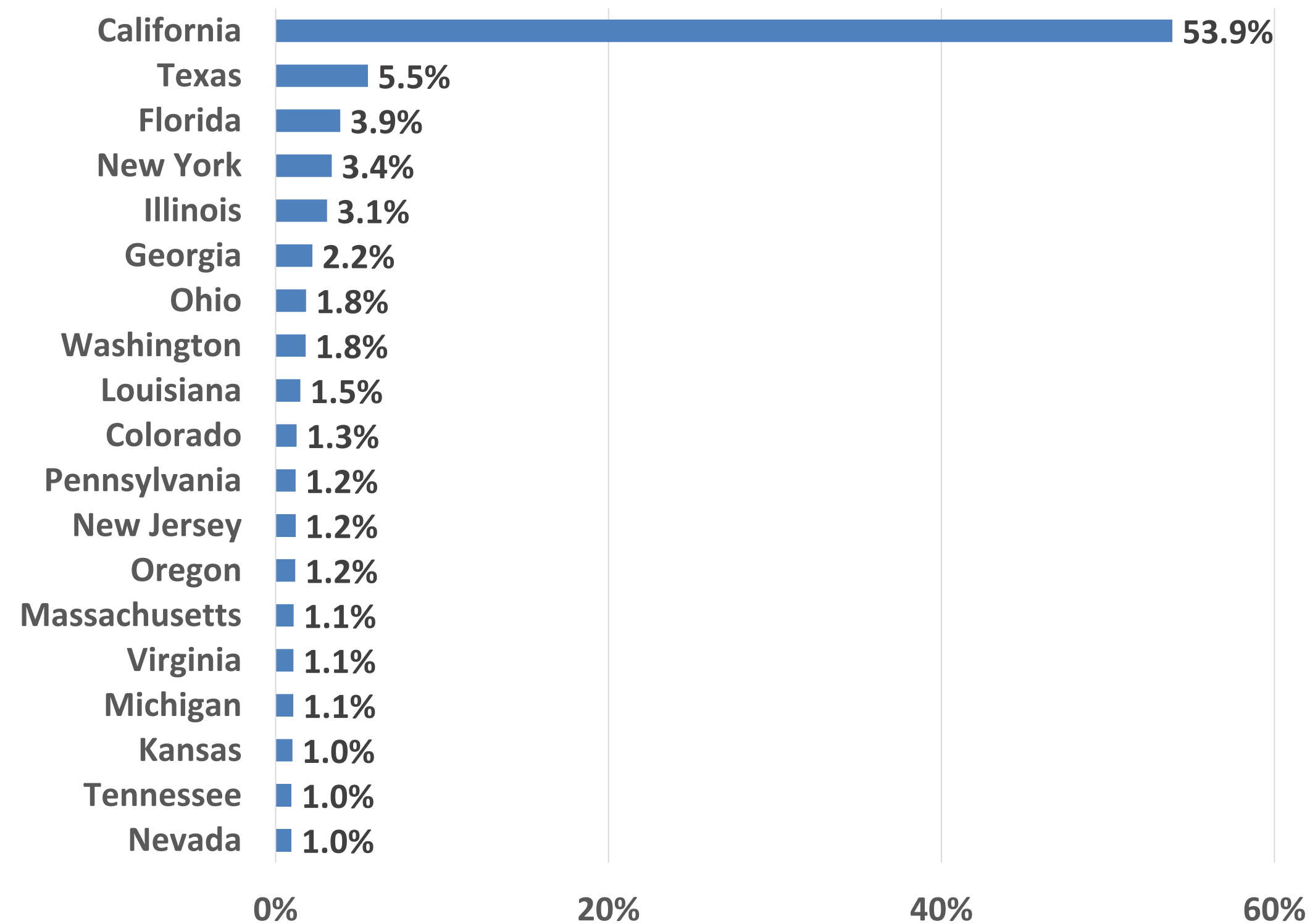
Question: In which country do you live? Base: All international respondents. 347 responses.



# State of Residence

Just over half of domestic Napa Valley area visitors surveyed were California residents (53.9%). The remaining 46.1 percent reside out-of-state, with top visitation from Texas (5.5%), Florida (3.9%), New York (3.4%) and Illinois (3.1%). One-third of visitors who did not stay overnight in the Napa Valley were out-of-state residents (35.0%).

Chart 36: State of Residence



Detail by Type of Visitor

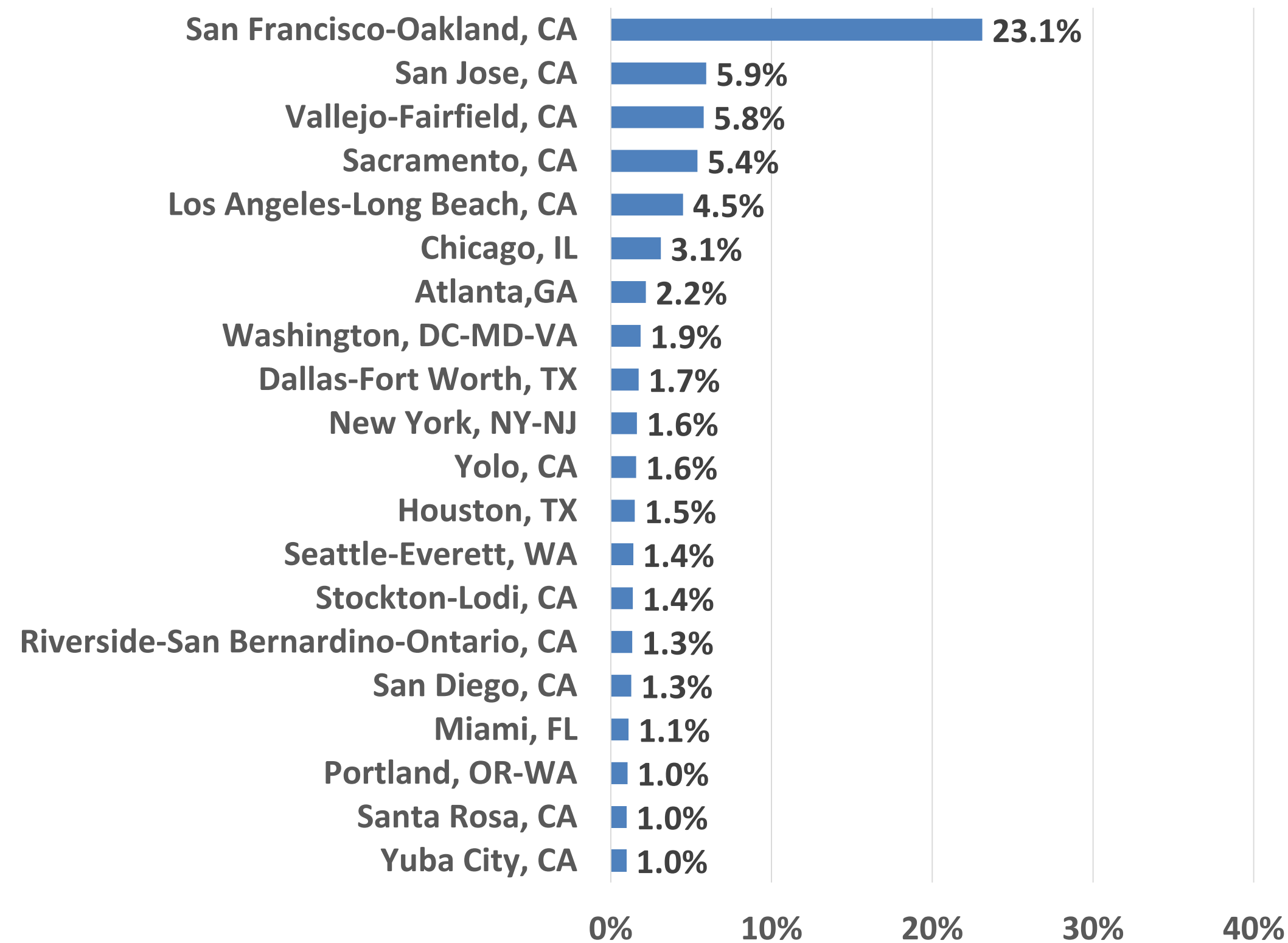
	Lodging Guest	Home Share Rental	VFR	Day-Trip
California	34.4%	22.6%	45.1%	65.0%
Texas	6.8%	2.5%	10.6%	4.7%
Florida	5.7%	5.0%	6.3%	2.8%
New York	6.1%	7.5%	4.2%	1.7%
Illinois	4.0%	0.0%	4.2%	2.7%
Georgia	2.2%	2.5%	0.0%	2.4%
Ohio	2.6%	2.5%	2.1%	1.4%
Washington	3.0%	15.1%	4.2%	0.6%
Louisiana	1.8%	2.5%	0.0%	1.4%
Colorado	2.1%	7.5%	2.1%	0.6%
Pennsylvania	2.4%	0.0%	4.2%	0.5%
New Jersey	2.6%	2.2%	2.1%	0.5%
Oregon	1.0%	0.0%	0.0%	1.4%
Massachusetts	1.9%	0.0%	0.0%	0.8%
Virginia	1.2%	0.0%	0.0%	1.1%
Michigan	1.2%	0.0%	2.1%	0.9%
Kansas	0.6%	0.0%	0.0%	1.3%
Tennessee	1.2%	5.0%	0.0%	0.8%
Nevada	1.4%	2.5%	0.0%	0.8%
Base	437	28	63	898

Question: What is your zip/postal code? Base: Respondents who live in the United States. 1426 responses.

# Point of Origin: MSA

In total, 23.1 percent of Napa Valley’s domestic visitors surveyed resided in the San Francisco-Oakland, CA metro area. Top MSA feeder markets outside San Francisco-Oakland include San Jose, CA (5.9%), Vallejo-Fairfield, CA (5.8%) and Sacramento, CA (5.4%). Top out-of-state markets include Chicago, IL (3.1%) and Atlanta, GA (2.2%) and Washington, DC (1.9%).

Chart 37: Top MSAs of Residence

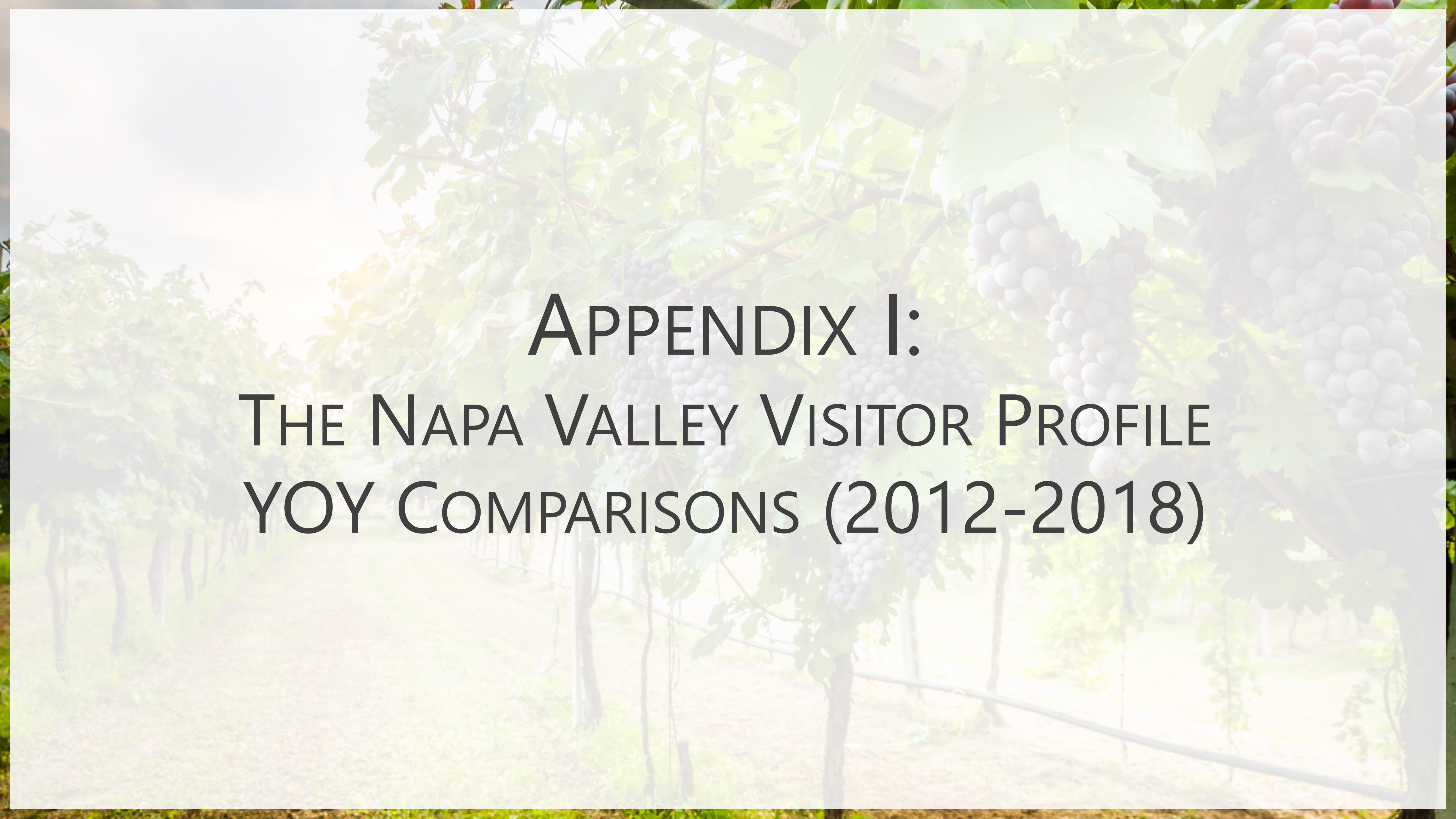


Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day-Trip
San Francisco-Oakland, CA	12.3%	8.4%	12.9%	29.3%
San Jose, CA	4.2%	0.0%	2.0%	7.4%
Vallejo-Fairfield, CA	1.1%	0.0%	0.0%	8.5%
Sacramento, CA	2.3%	2.8%	5.3%	7.0%
Los Angeles-Long Beach, CA	4.4%	5.6%	8.6%	4.1%
Chicago, IL	4.2%	0.0%	4.3%	2.6%
Atlanta, GA	2.3%	2.8%	0.0%	2.3%
Washington, DC-MD-VA	2.6%	0.0%	0.0%	1.6%
Dallas-Fort Worth, TX	1.7%	0.0%	2.2%	1.8%
New York, NY-NJ	3.5%	5.6%	4.3%	0.3%
Yolo, CA	0.8%	0.0%	0.0%	2.1%
Houston, TX	2.0%	0.0%	6.5%	1.0%
Seattle-Everett, WA	2.6%	16.8%	0.0%	0.5%
Stockton-Lodi, CA	0.8%	0.0%	0.0%	1.8%
Riverside-San Bernardino-Ontario, CA	2.1%	0.0%	6.5%	0.7%
San Diego, CA	1.4%	2.8%	4.3%	1.0%
Miami, FL	1.7%	0.0%	2.2%	0.8%
Portland, OR-WA	1.1%	0.0%	0.0%	1.1%
Santa Rosa, CA	0.2%	0.0%	0.0%	1.5%
Yuba City, CA	0.5%	0.0%	0.0%	1.3%
Base	402	25	61	861

Question: What is your zip/postal code? Base: Respondents who live in the United States. 1349 responses.



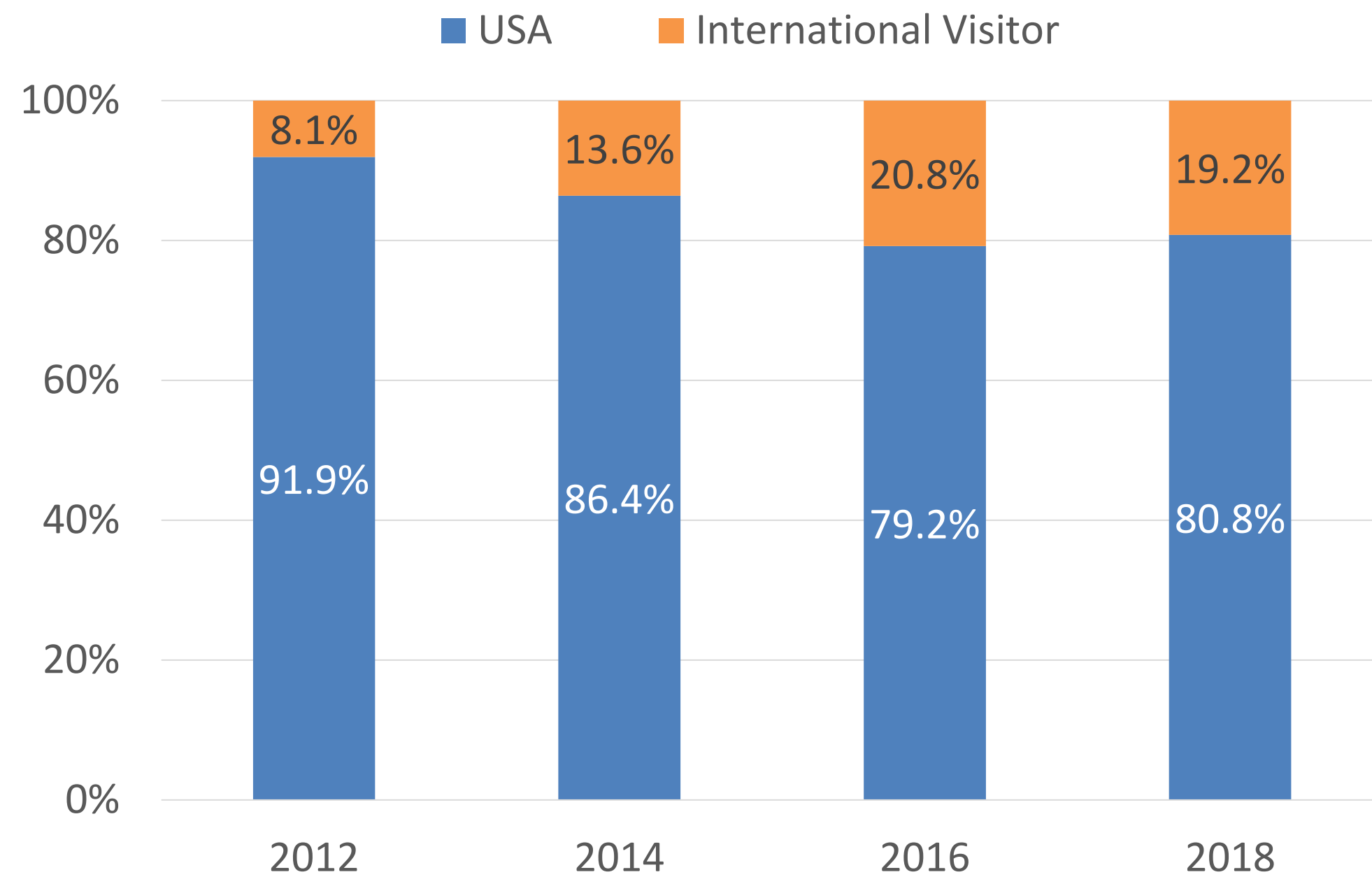


**APPENDIX I:  
THE NAPA VALLEY VISITOR PROFILE  
YOY COMPARISONS (2012-2018)**



# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 38: US vs. International Visitors (YOY)**



Question: Where do you currently live? Base: All respondents.

**Chart 39: Top Countries of Residence**

	2012	2014	2016	2018
USA	91.9%	86.4%	79.2%	80.8%
Canada	2.8%	3.1%	3.7%	3.3%
China	0.3%	2.7%	5.3%	3.2%
United Kingdom	1.2%	1.7%	1.2%	2.7%
Japan	0.7%	1.6%	1.1%	1.5%
Australia	1.0%	1.2%	1.6%	1.2%
Mexico	0.2%	0.7%	1.0%	0.8%
Germany	0.5%	1.1%	1.3%	0.5%

Question: In which country do you live? Base: All respondents.



# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 40: Point of Origin—Domestic Visitors MSA (YOY)**

	2018		2016		2014		2012	
*San Francisco-Oakland, CA	23.1%		*San Francisco-Oakland, CA	33.0%	*San Francisco-Oakland-San Jose, CA	45.3%	*San Francisco-Oakland-Fremont, CA	37.7%
San Jose, CA	5.9%		San Jose, CA	5.5%	Sacramento-Yolo, CA CMSA	7.5%	Los Angeles-Long Beach-Santa Ana, CA	8.4%
Vallejo-Fairfield-Napa, CA	5.8%		Sacramento, CA	4.5%	Los Angeles-Riverside-Orange County, CA	7.4%	Sacramento–Arden-Arcade–Roseville, CA	6.1%
Sacramento, CA	5.4%		Los Angeles-Long Beach, CA	4.2%	New York-Northern New Jersey-Long Island, NY-NJ-CT-PA	3.5%	New York-Northern New Jersey-Long Island, NY-NJ-PA	4.7%
Los Angeles-Long Beach, CA	4.5%		San Diego, CA	2.6%	Chicago-Gary-Kenosha, IL-IN-WI	2.6%	San Diego-Carlsbad-San Marcos, CA	2.6%
Chicago, IL	3.1%		Vallejo-Fairfield-Napa, CA	2.6%	Houston-Galveston-Brazoria, TX	1.7%	Chicago-Joliet-Naperville, IL-IN-WI	1.8%
Atlanta,GA	2.2%		Chicago, IL	2.3%	Atlanta, GA	1.5%	Phoenix-Mesa-Glendale, AZ	1.6%
Washington, DC-MD-VA	1.9%		Dallas-Fort Worth, TX	2.1%	Philadelphia-Wilmington-Atlantic City, PA-NJ-DE-MD	1.5%	Dallas-Fort Worth-Arlington, TX	1.3%
Dallas-Fort Worth, TX	1.7%		Miami, FL	1.6%	Seattle-Tacoma-Bremerton, WA	1.4%	Houston-Sugar Land-Baytown, TX	1.2%
New York, NY-NJ	1.6%		New York, NY-NJ	1.5%	San Diego, CA	1.3%	Portland-Vancouver-Hillsboro, OR-WA	0.9%
Yolo, CA	1.6%		Phoenix-Mesa, AZ	1.5%	Phoenix-Mesa, AZ	0.9%		

\*Please note: San Jose and Fremont were included in the San Francisco MSA in 2012 and 2014 but were separated in 2016 and 2018

Question: What is your zip/postal code? Base: All domestic respondents.

# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 41A: Point of Origin—Domestic Volume Estimates (YOY)**

Estimated Number of Visitors

	2012	2014	2016	2018
San Francisco-Oakland, CA	995,005	902,106	873,766	647,192
Vallejo-Fairfield, CA	0	0	67,213	162,781
Sacramento, CA	158,965	149,796	120,276	155,964
Los Angeles-Long Beach, CA	220,785	146,467	109,663	126,469
Chicago, IL	50,045	49,932	60,138	119,821
Atlanta,GA	0	29,959	28,300	83,897

**Figure 41B: Point of Origin—Spending Per-person, Per Day (YOY)**

	2012	2014	2016	2018
San Francisco-Oakland, CA	\$174.68	\$174.47	\$172.80	\$142.46
Vallejo-Fairfield, CA	-	-	\$79.74	\$85.76
Sacramento, CA	\$154.64	\$154.74	\$193.60	\$155.78
Los Angeles-Long Beach, CA	\$172.58	\$173.88	\$249.25	\$259.12
Chicago, IL	\$287.39	\$291.12	\$321.01	\$240.84
Atlanta,GA	\$258.20	\$258.58	\$128.56	\$238.74

Question: What is your zip/postal code? Base: All domestic respondents.



# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 42A: Point of Origin—International Volume Estimates (YOY)**

Estimated Number of Visitors

	2012	2014	2016	2018
Canada	82,426	103,193	165,357	128,029
China	8,831	89,878	238,452	122,541
United Kingdom	35,326	56,590	36,024	103,018
Japan	20,607	53,261	47,168	56,577
Australia	29,438	39,946	42,693	45,684
South Korea	-	-	35,707	30,778
Mexico	5,888	23,302	43,830	29,158
Germany	14,719	36,617	45,284	19,936

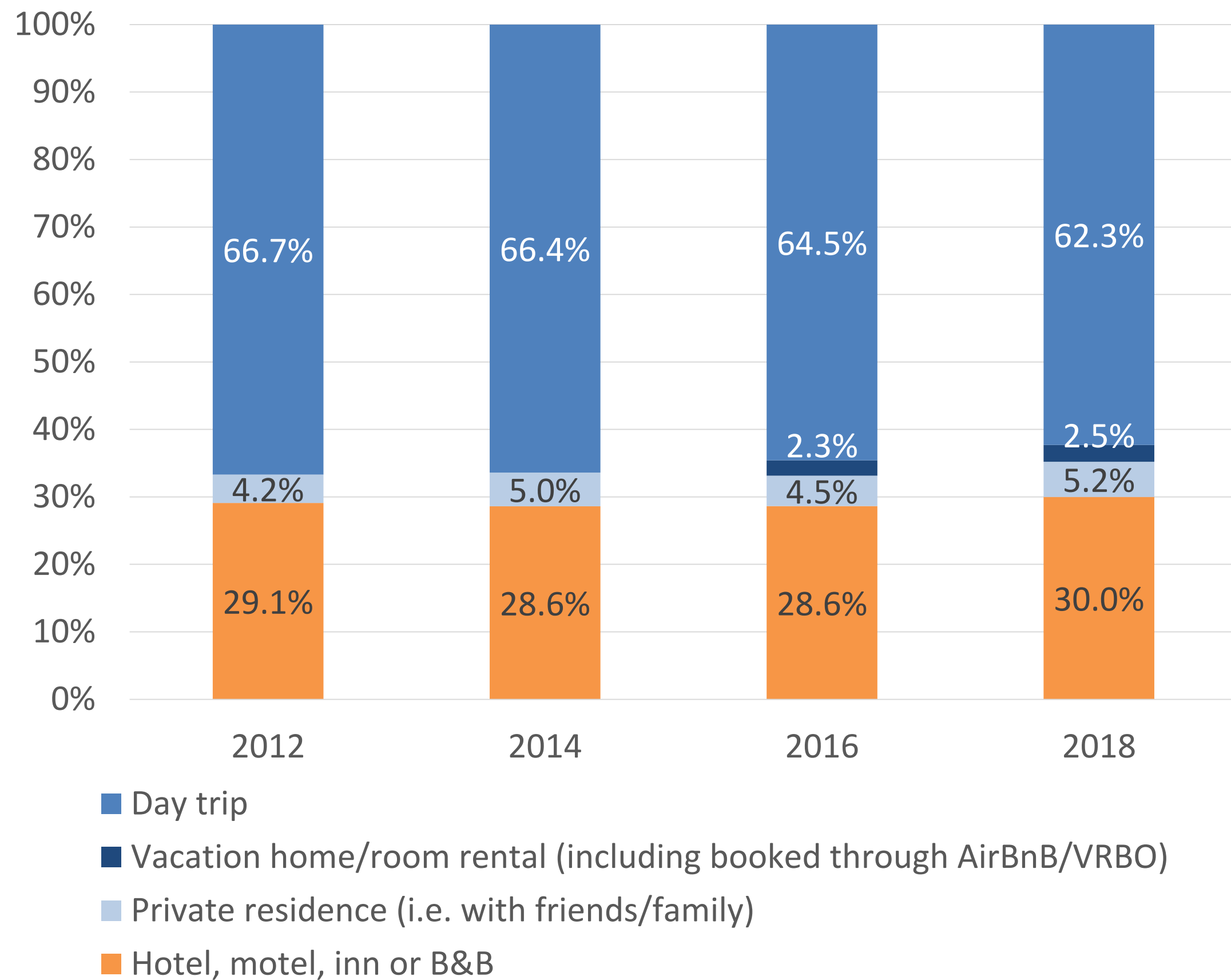
**Figure 42B: Point of Origin—Spending Per-person, Per Day (YOY)**

	2012	2014	2016	2018
Canada	\$236.59	\$267.79	\$291.38	\$263.64
China	\$238.76	\$194.00	\$155.55	\$245.59
UK	\$277.63	\$186.04	\$193.34	\$182.45
Japan	\$278.68	\$227.11	\$103.38	\$193.47
Australia	\$170.12	\$298.13	\$301.90	\$260.22
S. Korea	-	-	\$195.92	\$115.37
Mexico	\$38.57	\$178.66	\$139.13	\$228.66
Germany	\$60.37	\$123.70	\$116.51	\$145.01

Question: What is your zip/postal code? Base: All domestic respondents.

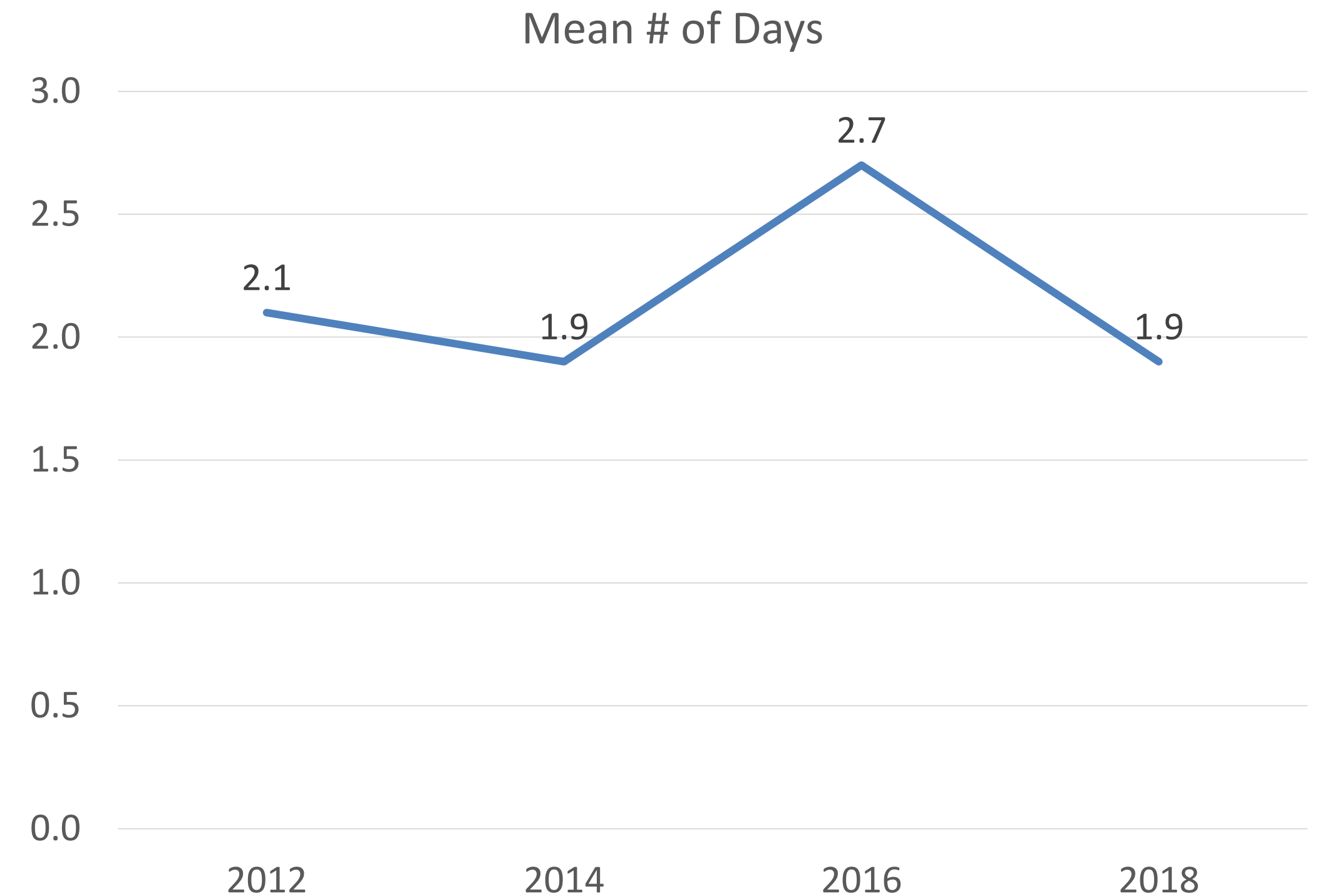
# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 43: Place of Stay (YOY)**



Question: Where are you staying overnight in Napa Valley? Base: All respondents.

**Figure 44: Length of Stay (YOY)**

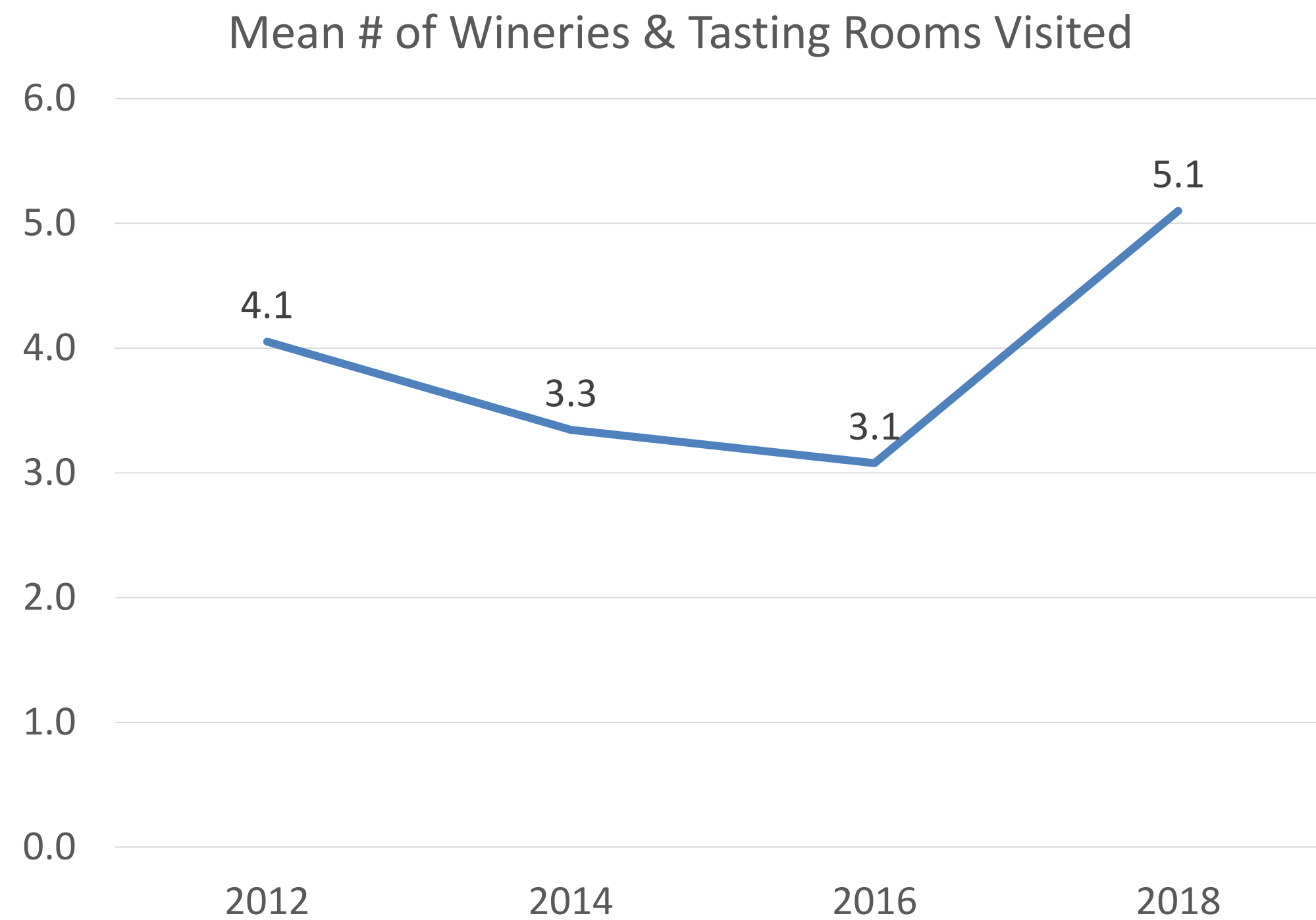


Question: How many days will you spend in the Napa Valley? Base: All respondents.



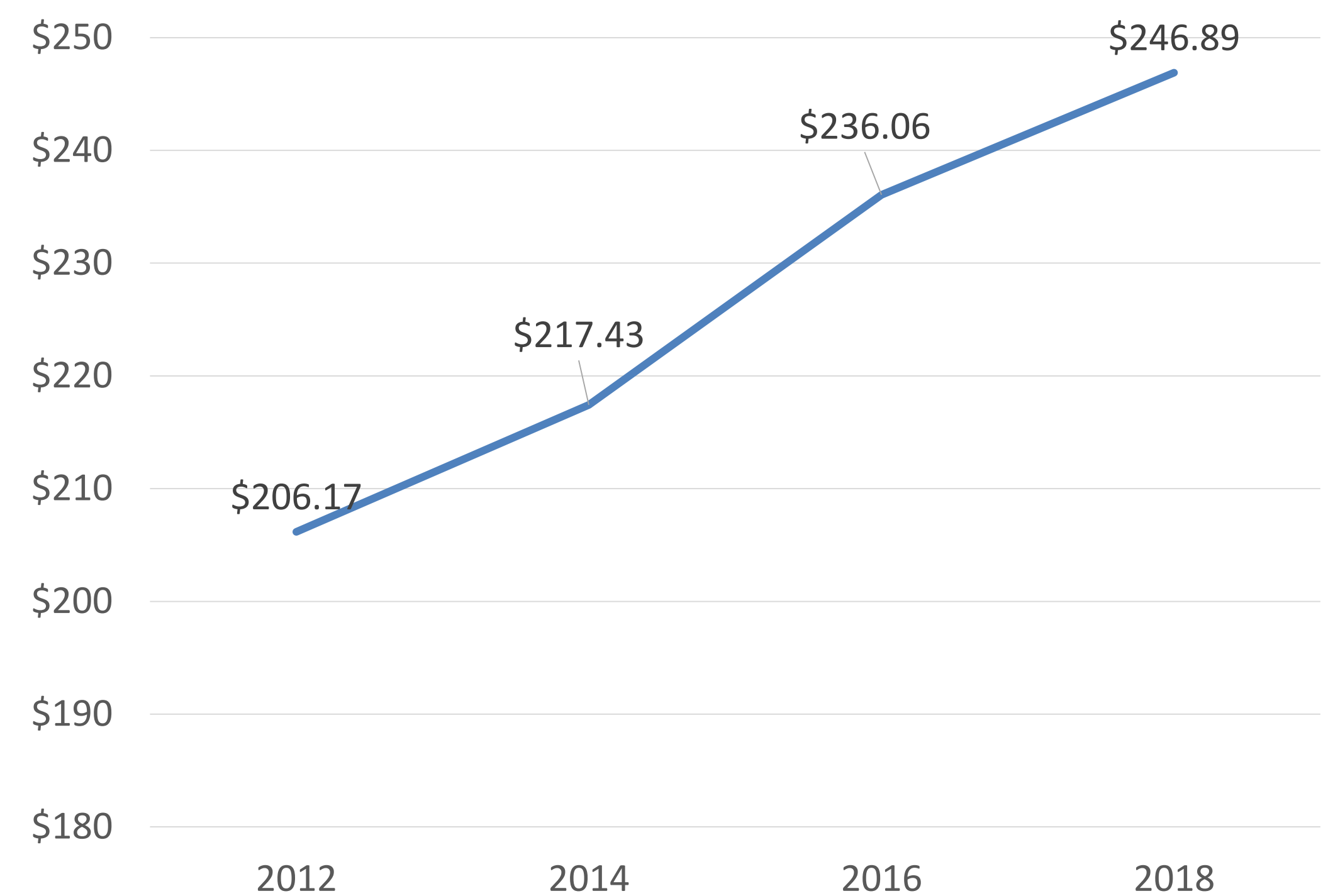
# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 45: Wineries & Tasting Rooms Visited (YOY)**



Question: How many Napa Valley wineries and stand-alone tasting rooms did you visit during your stay? Base: All respondents.

**Figure 46: Mean Daily In-Market Spending per Person (YOY)**



Question: Approximately how much will you spend in the Napa Valley PER DAY on the following? Base: All respondents.

# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 47: Activities/Attractions in the Napa Valley (YOY)**

	2012	2014	2016	2018
Wine tasting rooms	82.2%	82.3%	72.7%	81.0%
Wine tasting rooms (stand-alone)	--	--	20.6%	20.1%
Dining in restaurants	77.0%	69.4%	52.6%	65.2%
Shopping	53.8%	40.3%	36.4%	39.8%
Winery tours	52.0%	52.6%	39.8%	45.3%
Art galleries/art walks, etc.	16.7%	8.6%	9.2%	6.5%
Spa visit or treatment	13.5%	12.1%	10.7%	8.7%
Bars or nightlife	12.0%	10.1%	8.7%	7.7%
Visit a farmer's market	9.8%	8.5%	7.8%	8.3%
Visit a state or local park	9.7%	8.0%	8.1%	7.1%
Attend a festival or Special event	8.6%	4.7%	4.9%	3.8%
Guided tours	8.3%	8.3%	6.1%	4.7%
Other culinary activities	7.1%	7.6%	7.6%	5.2%
Hiking	6.8%	6.2%	5.9%	5.8%
Napa Valley Wine Train	6.2%	10.3%	14.1%	27.6%
Biking	4.6%	3.4%	4.0%	2.3%
Golf	3.6%	1.7%	1.5%	1.3%
Hot air ballooning	3.4%	2.8%	2.8%	2.8%
Performing arts (theater, live music, etc.)	1.9%	1.9%	3.2%	1.4%
Canoeing/kayaking	1.1%	0.7%	1.1%	0.6%
Organized athletic event	0.7%	0.4%	0.3%	0.0%

Question: On this trip, which activities or attractions will you participate in while in the Napa Valley? (SELECT ALL THAT APPLY)

Base: All respondents.



# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 48: Attractions/Services that Would Enhance the Napa Valley (YOY)**

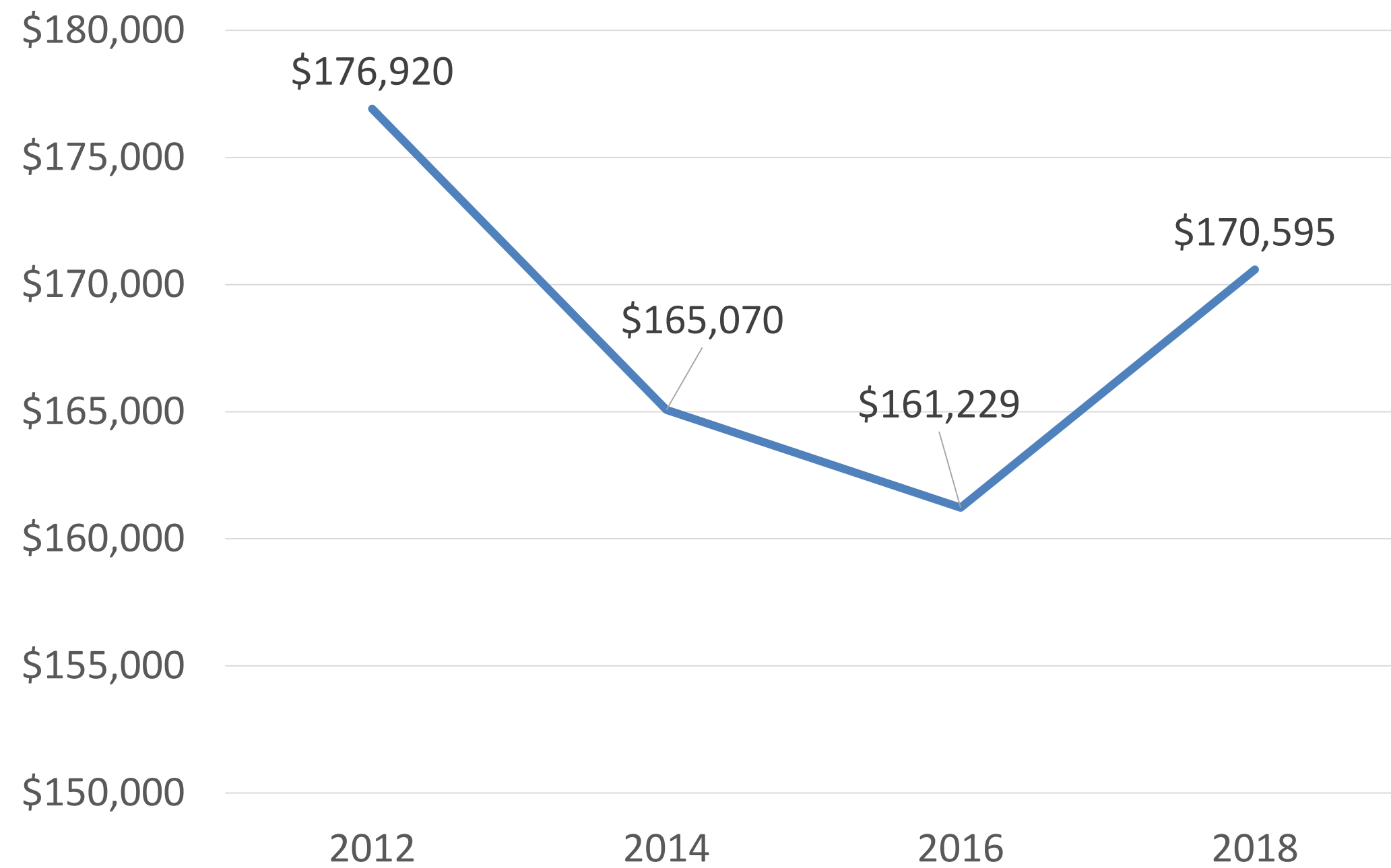
	2012		2014		2016		2018
Great as it is	15.8%	None	17.4%	None	37.2%	None	33.3%
None	5.2%	Great as it is	12.7%	Transportation	5.9%	Traffic/Transportation	13.0%
Affordable transportation	4.3%	More wine/wineries	4.9%	Less traffic	5.8%	Cheaper	7.5%
Less traffic	4.2%	Less traffic	4.8%	More diverse food options	4.7%	More diverse food options	3.6%
Free wine tastings	3.2%	Affordable transportation	4.6%	More activities	4.3%	Less crowded	3.2%
Cheaper	3.1%	Cheaper	3.4%	Great as it is	3.3%	More entertainment/live music	3.1%
More arts & culture	2.0%	More diverse food options	2.9%	Roads	2.8%	Better/more accessible information resources	3.0%
Better signage	2.0%	Free wine tastings	2.7%	Cheaper	2.6%	Guided tours	2.6%
More diverse food options	1.9%	Better signage	1.6%	Bike Tours	2.6%	More activities	1.9%
Better roads	1.8%	Better/more accessible information resources	1.6%	Better customer service	2.3%	More Kids Stuff	1.8%
More wine/wineries	1.6%	Better roads	1.4%	More Kids Stuff	2.1%	More wine/wineries	1.8%

Question: In your opinion, what attractions or services would most enhance the Napa Valley? (VERBATIM RESPONSE)

Base: All respondents.

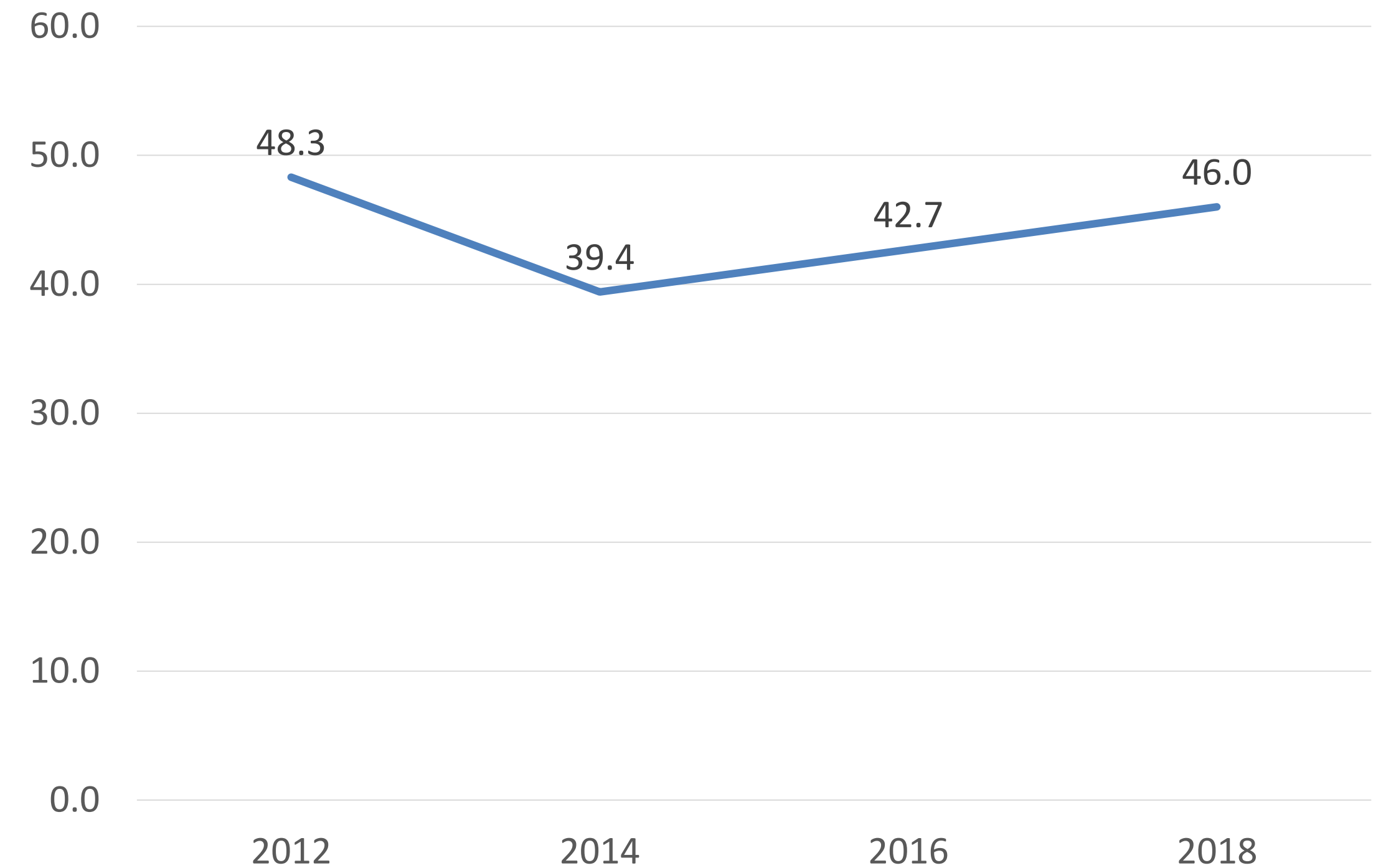
# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

**Figure 49: Mean Annual Household Income (YOY)**



Question: Which best describes the combined annual income of all members of your household?  
Base: All respondents.

**Figure 50: Mean Age (YOY)**



Question: What best describes your age? (Select one) Base: All respondents.



# The Napa Valley Visitor Profile YOY Comparisons (2012 – 2018)

Figure 51: Visitor Volume (YOY)

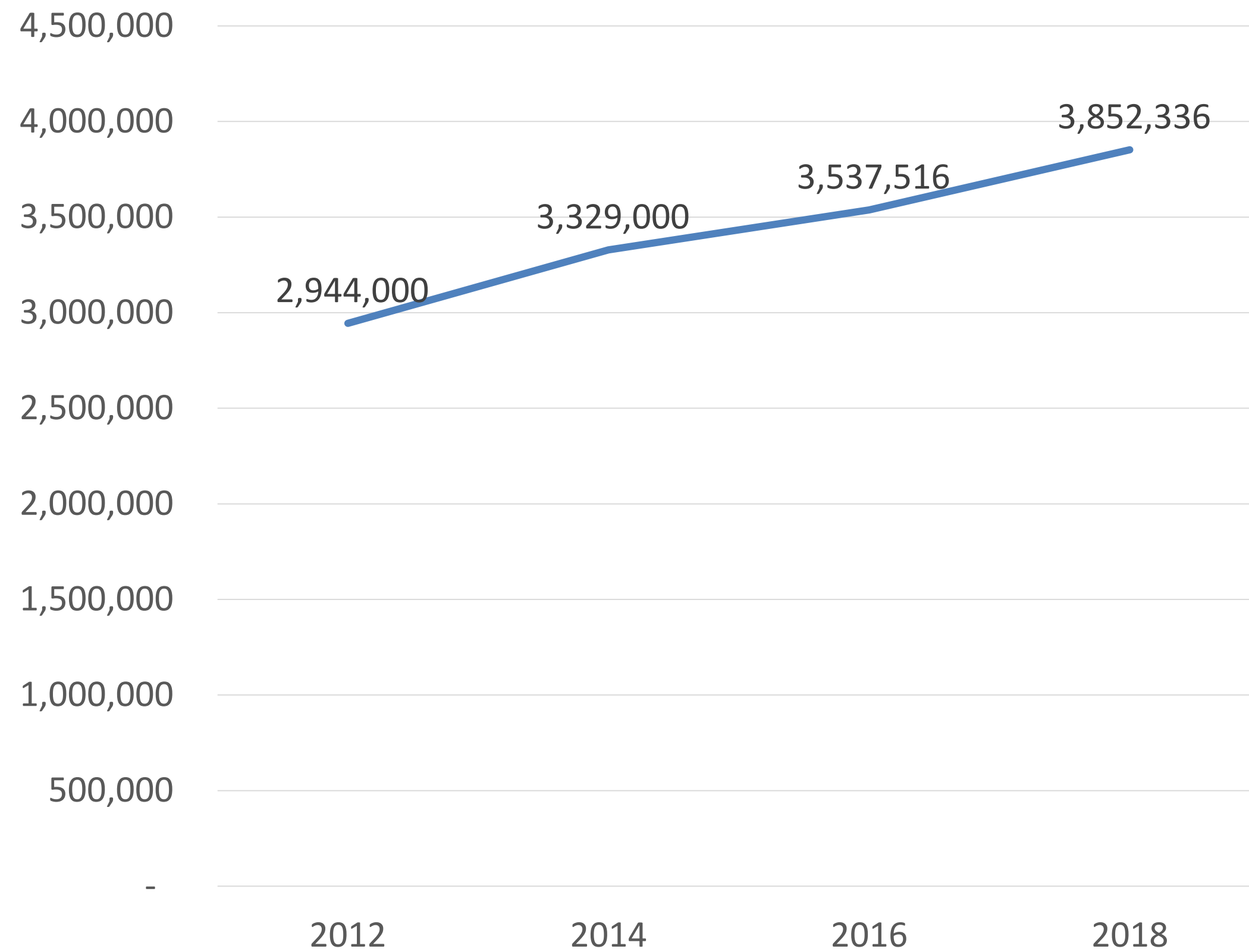


Figure 52: Visitor Spending in The Napa Valley (YOY)

