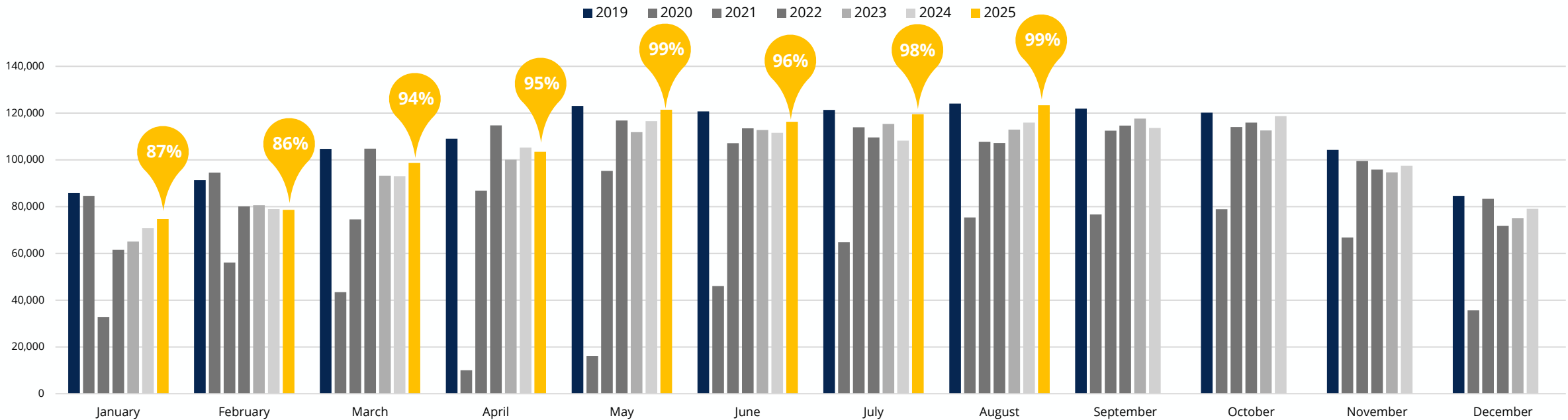


# 2019-2025 LODGING TREND



## Napa County Lodging Demand, by Month



Pace to 2019

| August Year to Date | Occupancy | ADR      | RevPAR   | Revenue       | Supply    | Demand  |
|---------------------|-----------|----------|----------|---------------|-----------|---------|
| 2025                | 64.7      | \$412.92 | \$267.23 | \$344,480,081 | 1,289,056 | 834,256 |
| 2024                | 62.6      | \$410.83 | \$257.11 | \$332,727,708 | 1,294,129 | 809,885 |
| 2019                | 71.7      | \$318.63 | \$228.44 | \$280,372,401 | 1,227,343 | 879,930 |
| YOY % change/2024   | 3.4%      | 0.5%     | 3.9%     | 3.5%          | -0.4%     | 3.0%    |
| YOY % change/2019   | -9.7%     | 29.6%    | 17.0%    | 22.9%         | 5.0%      | -5.2%   |

# LODGING: MONTH OF AUGUST 2025



| Month of August 2025            | Hotel Rooms (Approximate) | Occupancy   | YOY %       | ADR             | YOY %        | RevPAR          | YOY %       |
|---------------------------------|---------------------------|-------------|-------------|-----------------|--------------|-----------------|-------------|
| <b>COMPETITIVE SET</b>          |                           |             |             |                 |              |                 |             |
| <b>Napa County</b>              | <b>5,400</b>              | <b>75.0</b> | <b>5.7%</b> | <b>\$446.80</b> | <b>-2.5%</b> | <b>\$335.19</b> | <b>3.1%</b> |
| Sonoma County                   | 8,300                     | 70.5        | 3.4%        | \$230.84        | -2.2%        | \$162.74        | 1.2%        |
| Monterey County                 | 12,900                    | 79.5        | -0.5%       | \$377.85        | 3.7%         | \$300.41        | 3.2%        |
| San Luis Obispo County          | 10,900                    | 75.9        | 1.9%        | \$221.06        | -0.6%        | \$167.78        | 1.3%        |
| Santa Barbara County            | 10,800                    | 75.5        | -1.3%       | \$303.51        | 0.3%         | \$229.08        | -1.0%       |
| San Francisco County            | 34,000                    | 72.4        | 4.8%        | \$204.07        | 10.3%        | \$147.74        | 4.8%        |
| <b>JURISDICTIONS</b>            |                           |             |             |                 |              |                 |             |
| American Canyon                 | 410                       | 84.7        | 14.6%       | \$161.50        | -10.3%       | \$136.78        | 2.8%        |
| Napa (City of)                  | 2,790                     | 76.9        | 7.1%        | \$372.08        | 0.8%         | \$285.99        | 8.0%        |
| Yountville                      | 440                       | 66.6        | -7.1%       | \$741.54        | 1.5%         | \$494.21        | -5.7%       |
| St. Helena                      | 210                       | 76.9        | 6.0%        | \$604.25        | 2.9%         | \$464.74        | 9.1%        |
| Calistoga                       | 790                       | 68.8        | -1.2%       | \$596.60        | -3.7%        | \$410.52        | -4.8%       |
| Unincorporated Co.              | 760                       | 75.6        | 11.2%       | \$617.57        | -3.0%        | \$466.64        | 7.9%        |
| <b>SERVICE TYPE</b>             |                           |             |             |                 |              |                 |             |
| Napa Co. Luxury Hotels          |                           | 69.1        | -2.6%       | \$1,062.45      | 1.0%         | \$734.50        | -1.7%       |
| Napa Co. Group Hotels           |                           | 78.6        | 12.1%       | \$337.08        | -2.0%        | \$264.91        | 9.9%        |
| Napa Co. Limited-Service Hotels |                           | 80.6        | 5.2%        | \$219.55        | -2.4%        | \$176.99        | 2.6%        |

# LODGING: AUGUST 2025 YEAR-TO-DATE



| CYTD August 2025                | Hotel Rooms (Approximate) | Occupancy   | YOY %       | ADR             | YOY %       | RevPAR          | YOY %       |
|---------------------------------|---------------------------|-------------|-------------|-----------------|-------------|-----------------|-------------|
| <b>COMPETITIVE SET</b>          |                           |             |             |                 |             |                 |             |
| <b>Napa County</b>              | <b>5,400</b>              | <b>64.7</b> | <b>3.4%</b> | <b>\$412.92</b> | <b>0.5%</b> | <b>\$267.23</b> | <b>3.9%</b> |
| Sonoma County                   | 8,300                     | 60.7        | -1.3%       | \$211.02        | -1.0%       | \$128.11        | -2.2%       |
| Monterey County                 | 12,900                    | 70.1        | 3.1%        | \$272.95        | 0.5%        | \$191.23        | 3.7%        |
| San Luis Obispo County          | 10,900                    | 67.4        | 2.2%        | \$193.52        | -0.2%       | \$130.37        | 1.9%        |
| Santa Barbara County            | 10,800                    | 68.4        | -0.1%       | \$253.15        | 1.4%        | \$173.11        | 1.3%        |
| San Francisco County            | 34,000                    | 67.1        | 5.6%        | \$239.90        | 3.9%        | \$160.96        | 9.8%        |
| <b>JURISDICTIONS</b>            |                           |             |             |                 |             |                 |             |
| American Canyon                 | 410                       | 71.7        | -1.2%       | \$157.62        | -1.6%       | \$113.01        | -2.8%       |
| Napa (City of)                  | 2,790                     | 66.9        | 4.7%        | \$343.32        | 1.6%        | \$229.76        | 6.4%        |
| Yountville                      | 440                       | 55.7        | -5.6%       | \$693.60        | 2.8%        | \$386.68        | -2.9%       |
| St. Helena                      | 210                       | 68.1        | 7.6%        | \$576.75        | 0.8%        | \$392.55        | 8.5%        |
| Calistoga                       | 790                       | 63.5        | 5.1%        | \$544.78        | -1.0%       | \$345.67        | 4.0%        |
| Unincorporated Co.              | 760                       | 59.4        | 5.2%        | \$581.06        | 1.7%        | \$345.01        | 7.0%        |
| <b>SERVICE TYPE</b>             |                           |             |             |                 |             |                 |             |
| Napa Co. Luxury Hotels          |                           | 59.3        | 3.6%        | \$964.55        | 1.7%        | \$571.53        | 5.3%        |
| Napa Co. Group Hotels           |                           | 66.7        | 5.5%        | \$315.21        | -0.1%       | \$210.33        | 5.4%        |
| Napa Co. Limited-Service Hotels |                           | 71.1        | 1.0%        | \$200.33        | -2.2%       | \$210.33        | -1.2%       |