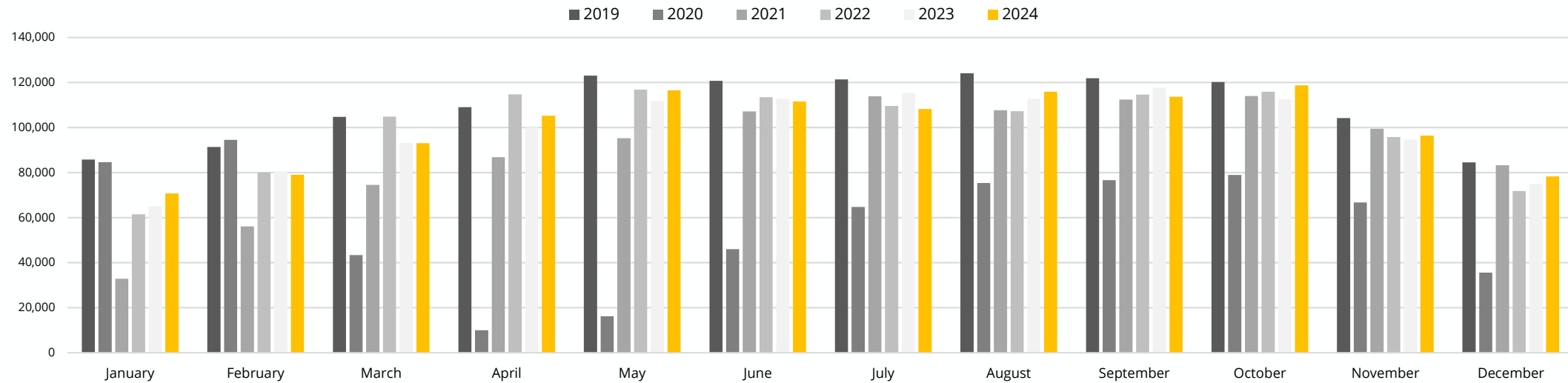


# 2019-2024 LODGING TREND



## Napa County Lodging Demand



December Year to Date	Occupancy	ADR	RevPAR	Revenue	Supply	Demand
2024	<b>62.8</b>	<b>\$421.84</b>	\$265.10	\$510,158,675	1,924,435	1,209,374
2023	<b>61.7</b>	<b>\$430.09</b>	\$265.30	\$512,583,444	1,932,117	1,191,812
2019	<b>71.1</b>	<b>\$327.82</b>	\$233.06	\$429,731,075	1,843,841	1,310,858
YOY % change/2023	<b>1.9%</b>	<b>-1.9%</b>	-0.1%	-0.5%	-0.4%	1.4%
YOY % change/2019	<b>-11.7%</b>	<b>28.7%</b>	13.7%	18.7%	4.4%	-7.7%

# DECEMBER YEAR-TO-DATE DETAIL



Calendar YTD December 2024	Hotel Rooms (Approximate)	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
<b>COMPETITIVE SET</b>							
Napa County	5,400	62.8	1.9%	\$421.84	-1.9%	\$265.10	-0.1%
Sonoma County	8,300	61.1	2.6%	\$215.08	-0.2%	\$131.45	2.4%
Monterey County	12,900	66.9	1.1%	\$267.71	0.4%	\$179.12	1.5%
San Luis Obispo County	10,900	64.8	-0.4%	\$190.28	0.2%	\$123.36	-0.2%
Santa Barbara County	10,800	67.8	1.8%	\$249.43	-0.2%	\$169.05	1.6%
San Francisco County	34,000	62.9	-1.9%	\$227.54	-6.3%	\$143.21	-8.1%
<b>JURISDICTIONS</b>							
American Canyon	410	71.7	-1.2%	\$159.87	-4.3%	\$114.68	-5.4%
Napa (City of)	3,000	64.1	2.5%	\$343.52	-1.4%	\$220.03	1.0%
Yountville	440	59.1	-2.8%	\$699.72	-0.4%	\$413.34	-3.2%
Calistoga	790	61.4	2.9%	\$557.54	-4.5%	\$342.60	-1.8%
Unincorporated Co.	760	57.2	0.3%	\$593.69	-1.2%	\$339.73	-0.9%
<b>SERVICE TYPE</b>							
Luxury Hotels		57.8	2.7%	\$977.30	-2.5%	\$565.14	0.1%
Group Hotels		63.6	-1.0%	\$318.38	-3.4%	\$202.37	-4.3%
Limited-Service Hotels		70.6	2.1%	\$204.61	1.1%	\$202.37	3.2%

# MONTH OF DECEMBER DETAIL



Month of December 2024	Hotel Rooms (Approximate)	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
<b>COMPETITIVE SET</b>							
Napa County	5,400	48.4	5.3%	\$325.60	0.5%	\$157.53	5.9%
Sonoma County	8,300	48.9	4.4%	\$174.14	3.2%	\$85.08	7.8%
Monterey County	12,900	54.3	-10.9%	\$216.23	3.5%	\$117.52	8.8%
San Luis Obispo County	10,900	54.2	1.8%	\$160.09	-0.1%	\$86.80	1.7%
Santa Barbara County	10,800	59.1	2.9%	\$220.90	1.6%	\$130.58	4.6%
San Francisco County	34,000	49.2	-8.8%	\$188.70	10.3%	\$92.93	-8.8%
<b>JURISDICTIONS</b>							
American Canyon	410	60.1	1.9%	\$117.94	-0.9%	\$70.86	1.0%
Napa (City of)	3,000	50.8	9.0%	\$261.37	2.4%	\$132.65	11.7%
Yountville	440	38.3	-13.2%	\$547.83	0.8%	\$209.98	-12.5%
Calistoga	790	50.4	4.0%	\$483.79	3.7%	\$244.06	7.9%
Unincorporated Co.	760	37.6	9.2%	\$468.11	0.8%	\$175.91	10.0%
<b>SERVICE TYPE</b>							
Luxury Hotels		39.2	0.8%	\$788.22	2.1%	\$308.59	2.9%
Group Hotels		49.7	9.5%	\$238.10	0.2%	\$118.34	9.7%
Limited-Service Hotels		58.6	3.1%	\$147.83	1.6%	\$86.63	4.8%