



# 2025 DESTINATION SYMPOSIUM

Empowering Napa Valley's  
Hospitality Community

SEPTEMBER 25, 2025





# Visit Napa Valley Destination Symposium

SUPPORTING THE HOSPITALITY COMMUNITY

## PART 1

### STATE OF TOURISM

- LODGING UPDATE
- VISITOR PROFILE & ECONOMIC IMPACT

## PART 2

### TOURISM MATTERS

- BENEFITS
- HOW WE WORK

## PART 3

### DESTINATION MARKETING ORGANIZATION PROGRAMS & INITIATIVES

- 2024-2026 LONG RANGE PLAN
- FY 2026 ANNUAL PLAN
- FY 2025 HIGHLIGHTS

## PART 4

### KEYNOTE

**LYNN CARPENTER**  
SENIOR VICE PRESIDENT OF MARKETING,  
VISIT CALIFORNIA

## PART 5

### VNV FY25 PAID MEDIA PERFORMANCE & NEW CAMPAIGN

#### AMANDA MOUL

VICE PRESIDENT, ACCOUNT MANAGEMENT  
THE SHIPYARD

## PART 6

### FY26 DMO INITIATIVES

- BAY AREA HOST COMMITTEE
- THE NAPA VALLEY STANDARD
- DESTINATION-WIDE WELLNESS

## PART 7

### GREAT WINE CAPITALS 2026 BEST OF WINE TOURISM REGIONAL AWARDS

## PART 8

### CLOSING REMARKS

## PART 9

### RECEPTION



CARNEROS  
RESORT AND SPA

## Ed Costa

Chair, Visit Napa Valley Board  
of Directors

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Member, Napa Valley Tourism  
Corporation Board of Directors

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Managing Director, Carneros  
Resort & Spa



# TOURISM IMPROVEMENT DISTRICT (TID)



## HISTORY

Formed in 2010 for a 5-year term; renewed for a 10-year term in 2015 and again in 2025

## NEW TERM

10 years: June 16, 2025- June 15, 2035

## BOUNDARIES

The NVTID includes all hotels within the boundaries of the cities of American Canyon, Calistoga, Napa, and St. Helena, the town of Yountville, and the unincorporated area of the County of Napa.

It allows for collection of an assessment on all overnight lodging guests to fund destination marketing programs.

## Five Distinct Towns,



## One Amazing Valley

# Napa Valley TID Renewed for 10 Years!



Visit Napa Valley will continue to perform the Destination Marketing Services for Napa Valley through June 15, 2035

Marcelle Adderley, NVTC Board Chair; George Goeggel NVTC Secretary/Treasurer; Emma Swain VNV Board Chair; Ed Costa VNV Chair Elect; Rick Kaufman VNV Vice Chair pictured with Linsey Gallagher and Teresa Coleman of Visit Napa Valley



# Linsey Gallagher

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**PRESIDENT & CEO**  
Visit Napa Valley





# *State of Tourism*

PART 1

VISIT  
*Napa Valley*



## New Data Highlights Current State of the US Hotel Industry

*Thursday, August 28, 2025*

The U.S. **hotel industry was once again in the negative this past July** compared to last year, according to information and analytics provider CoStar.



## Travel Demand Health Check

Hotel **demand was up just 0.1% year-to-date through July**, prompting a slight downgrade to the STR/Tourism Economics forecast. The room demand growth outlook for 2025 was reduced from 0.5% to -0.1%.



## U.S. RevPAR set for decline

*Thursday, September 4, 2025*

For 2025, U.S. **revenue per available room is expected to decrease 0.7 percent** to \$99.50, driven by growth in average daily rate of 0.8 percent to \$160.35 while occupancy declines 1.6 percent to 62.1 percent.

# AND YET...



## Napa Valley Top-Line Lodging Metrics Fiscal Year 2025

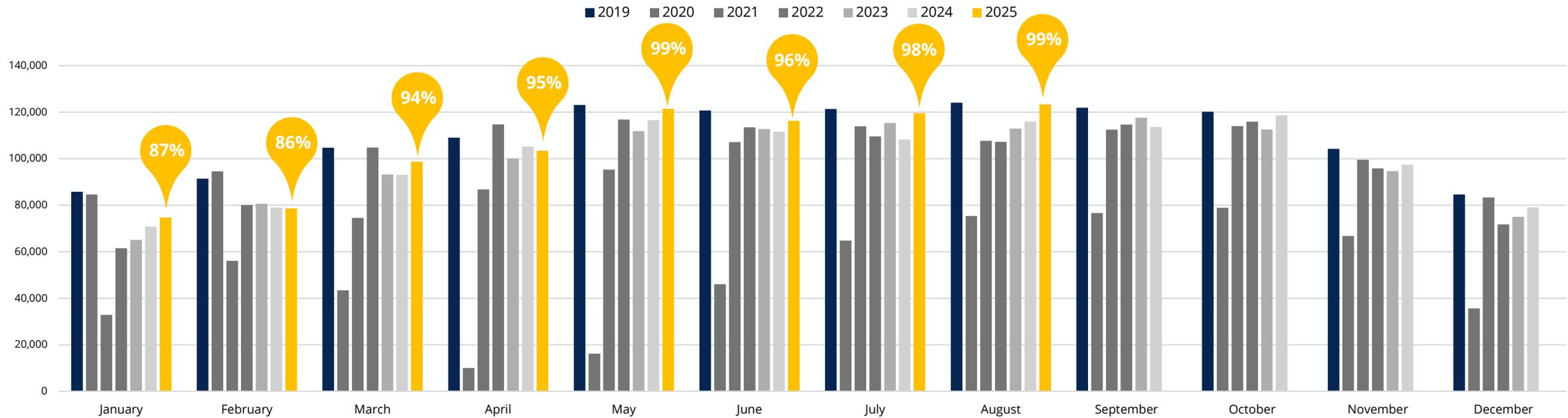
(JULY 2024 - JUNE 2025)

<b>DEMAND</b>	<b>1.3 MILLION</b>	<b>+1.5% YOY</b>
<b>OCCUPANCY</b>	<b>64%</b>	<b>+2.0% YOY</b>
<hr/>		
<b>ADR</b>	<b>\$413</b>	<b>+0.5% YOY</b>
<b>REVPAR</b>	<b>\$265</b>	<b>+2.7% YOY</b>
<b>REVENUE</b>	<b>\$525 MILLION</b>	<b>+2.2% YOY</b>

# 2019-2025 LODGING TREND



## Napa County Lodging Demand, by Month



Pace to 2019

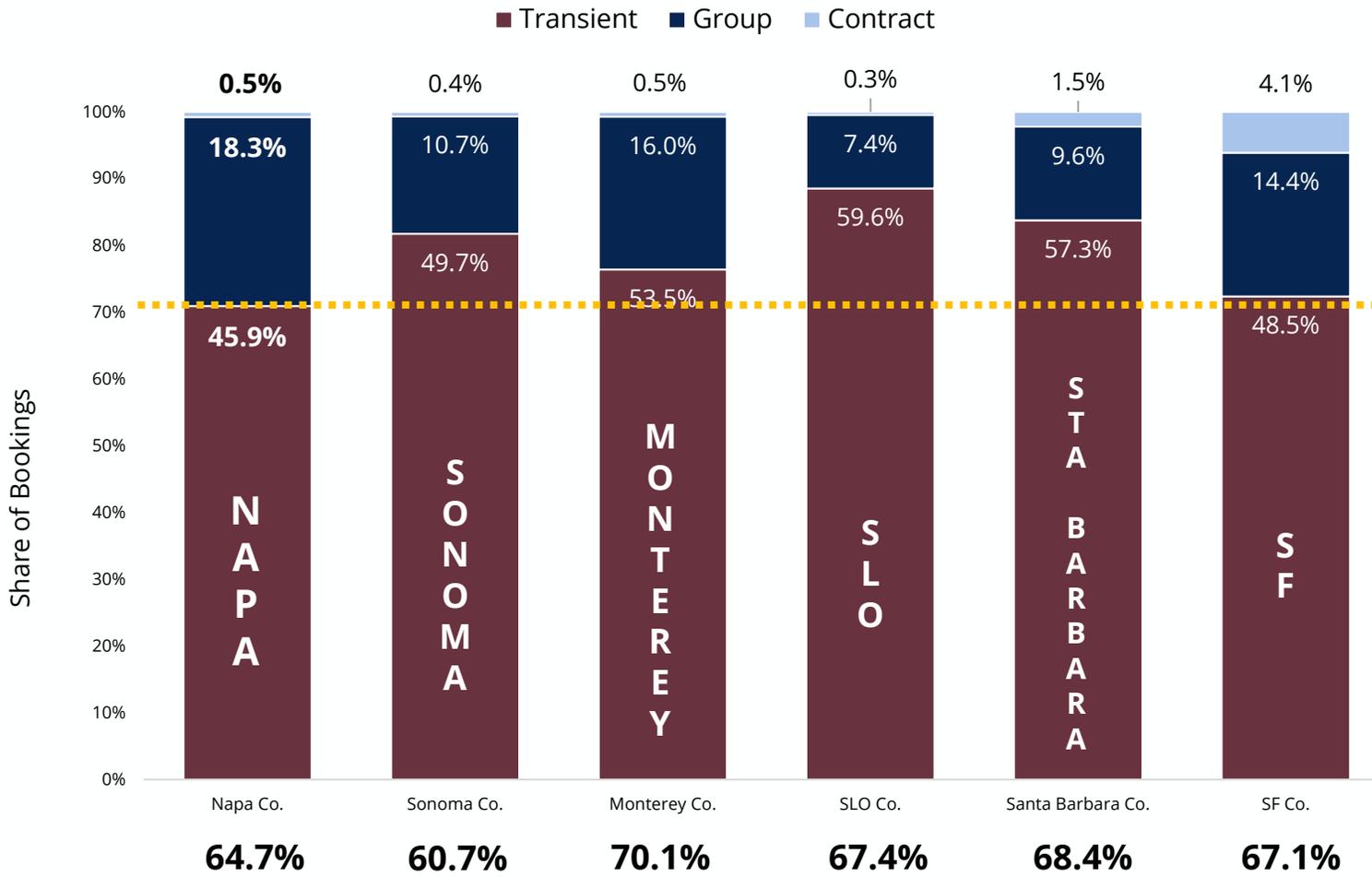
August Year to Date	Occupancy	ADR	RevPAR	Revenue	Supply	Demand
2025	64.7	\$412.92	\$267.23	\$344,480,081	1,289,056	834,256
2024	62.6	\$410.83	\$257.11	\$332,727,708	1,294,129	809,885
2019	71.7	\$318.63	\$228.44	\$280,372,401	1,227,343	879,930
YOY % change/2024	3.4%	0.5%	3.9%	3.5%	-0.4%	3.0%
YOY % change/2019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

# LODGING: 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%

# GROUP REPRESENTS 28% OF OCCUPANCY IN NAPA VALLEY

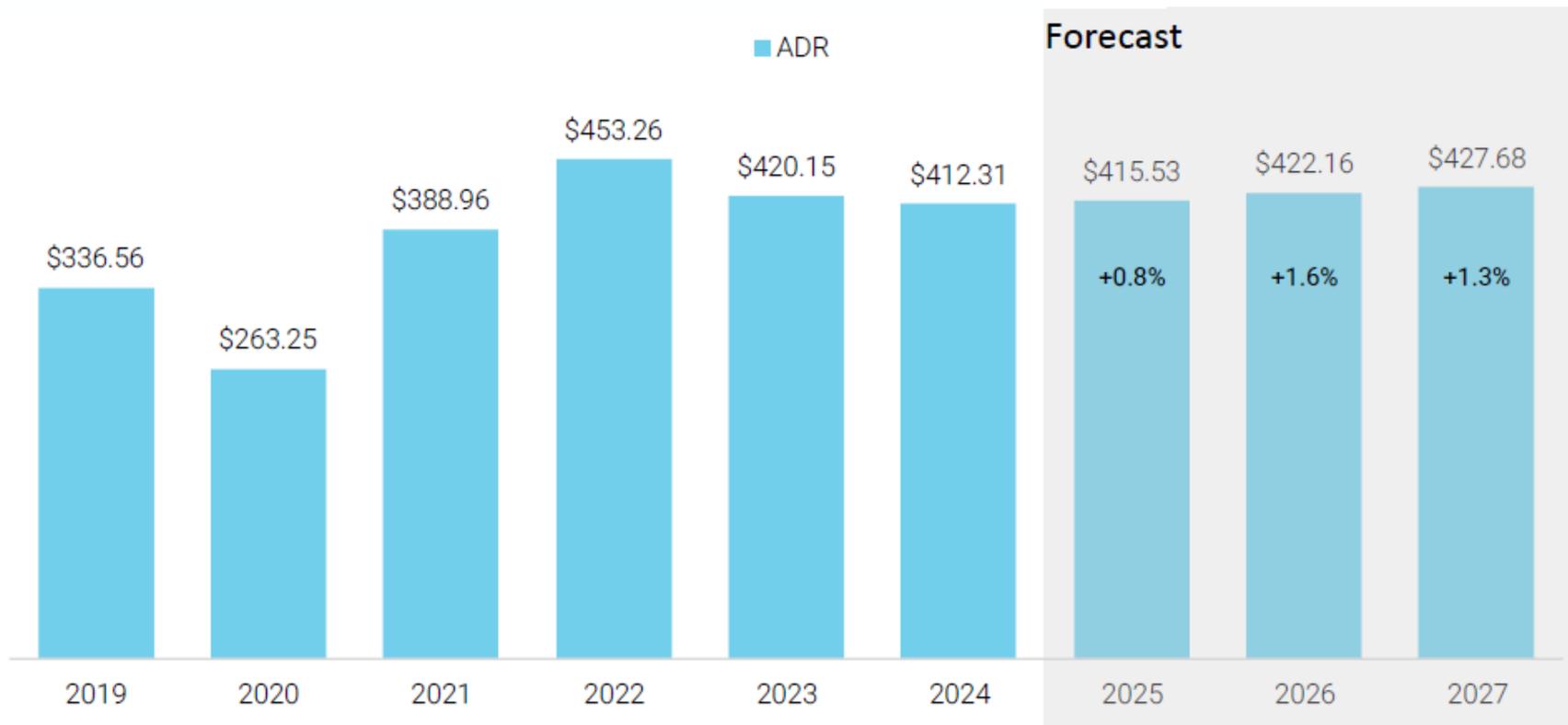


## AUGUST YTD 2025

At 28.3%, Napa has a higher ratio of Group than the competitive markets.

YOY, Napa saw an increase in Group occupancy of +10.5%, second only to San Francisco which a 11.0% increase.

## Average Daily Rate (ADR) \$ Annual



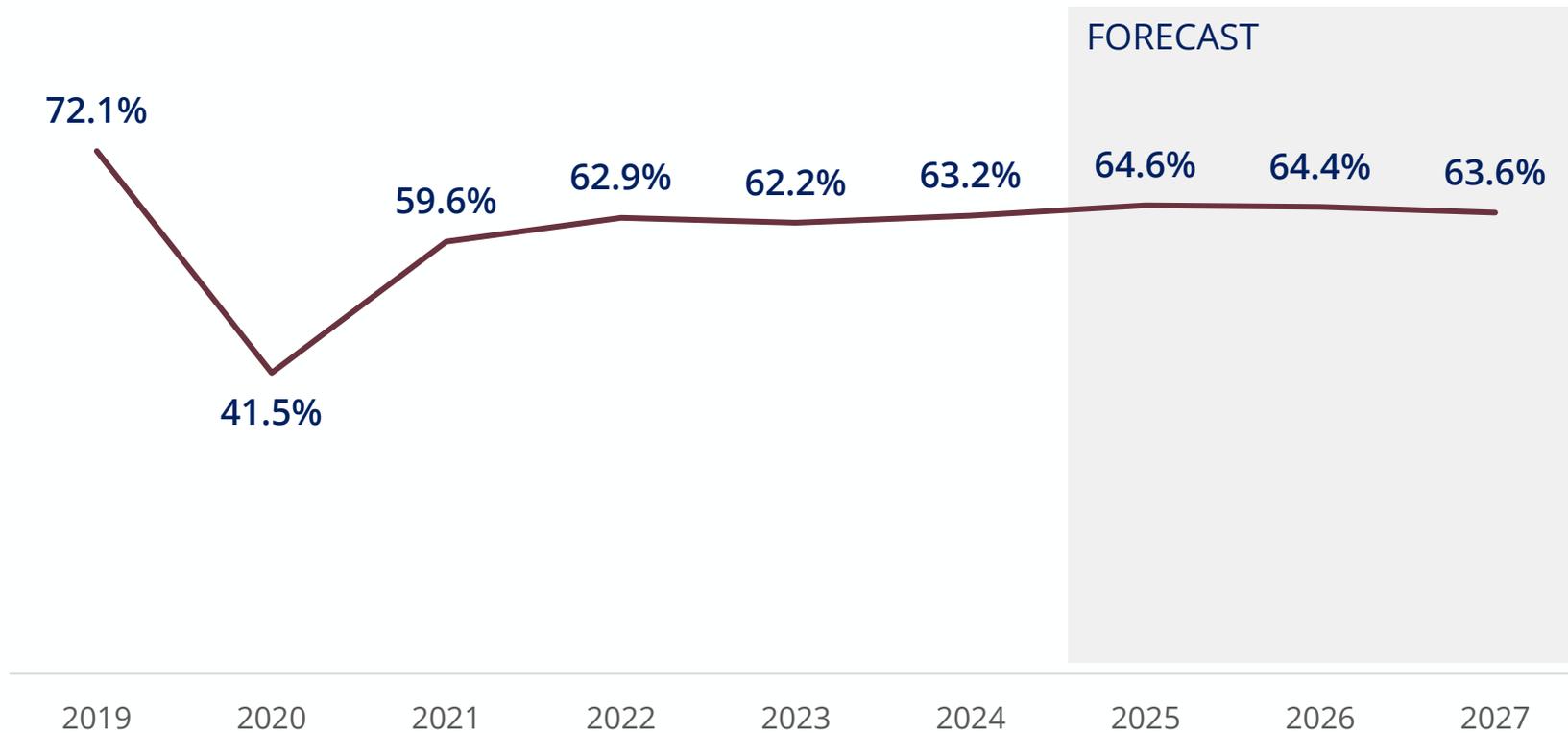
### 2025

ADR growth is forecast to be 0.8%, a turnaround from two years of decline in 2023 & 2024.

### 2026

ADR increases are expected to strengthen to 1.6%, supported by continued growth in demand.

## Occupancy % Annual



### 2025

An improvement in Demand which, when combined with only a marginal increase in Supply, equates to a 2.2% rise in Occupancy.

### 2026

Given a more substantial projected increase in Supply, Occupancy is expected to contract marginally by 0.3%.

# NAPA VALLEY TOURISM



Napa Valley Welcomed a Total of  
**3.7 MILLION**

Visitors



**90%**  
DOMESTIC

**10%**  
INTERNATIONAL

**62%**  
DAY TRIP VISITORS



**38%**  
OVERNIGHT GUESTS

**95%**  
OF VISITORS ARE LIKELY TO RETURN

AVERAGE VISITOR MADE  
**3**  
TRIPS TO NAPA VALLEY  
IN PAST 12 MONTHS

Visitors to Napa Valley Spent  
**\$2.5 BILLION**  
Supporting Local Businesses



**\$541M**  
RESTAURANTS



**\$830M**  
RETAIL &  
WINERIES



**\$686M**  
LODGING

**66%** OF SPENDING WAS GENERATED BY OVERNIGHT HOTEL GUESTS

**\$1.7 BILLION**  
SPENT BY  
OVERNIGHT  
HOTEL GUESTS

**\$864 MILLION**  
SPENT BY  
NON-HOTEL  
GUESTS

Napa Valley Visitor Economy Generated  
**\$107.5 MILLION**  
in Tax Revenue for  
Community Services



PARKS &  
RECREATION



PUBLIC  
SAFETY



ROAD  
IMPROVEMENTS

AND MORE!

The Tourism Industry  
Supports an Estimated

**16,000**

Jobs in the  
Community

Visitor Spending on  
a Typical Day was

**\$7 million**

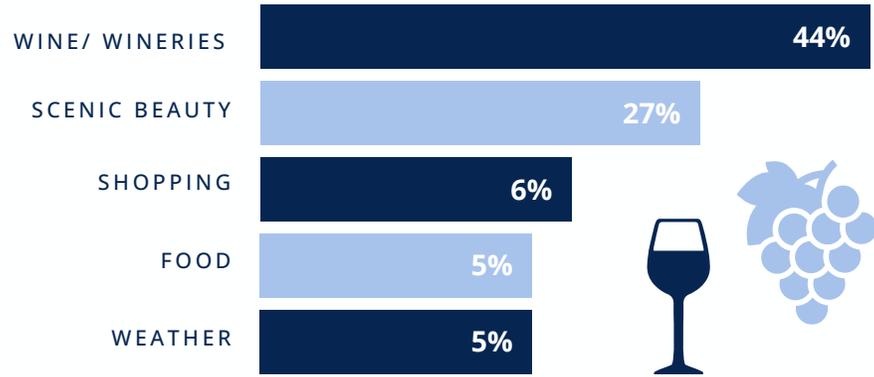
DIRECT VISITOR  
SPENDING INCREASED BY  
**+13%** VS. 2018

TAX REVENUE  
INCREASED BY  
**26%**

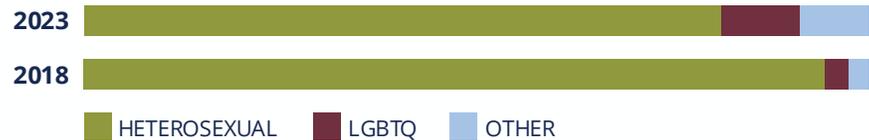
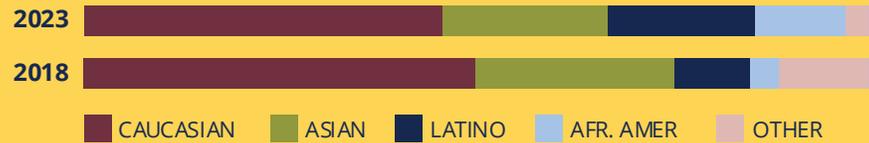
# Napa Valley Visitors are Younger and More Diverse



## VISITOR TRIP DETAILS



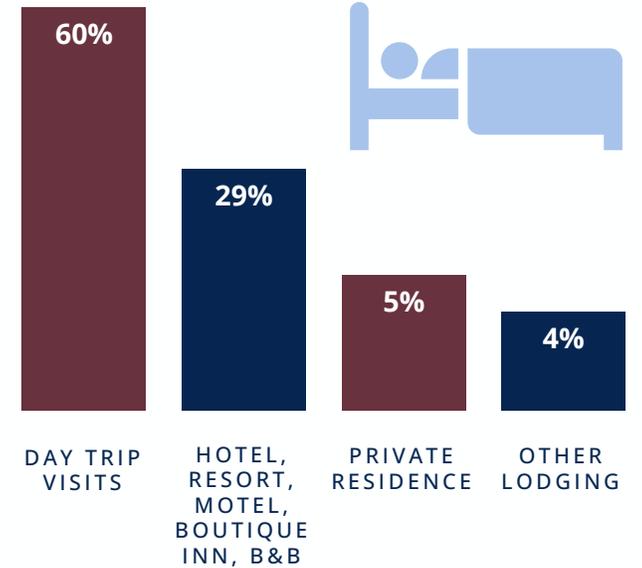
## MORE DIVERSE THAN 2018



## YOUNGER, AFFLUENT, EDUCATED



## NAPA VALLEY VISITORS & OVERNIGHT LODGING



## PEOPLE ARE TALKING ABOUT THE NAPA VALLEY



*Update Coming in 2026!*



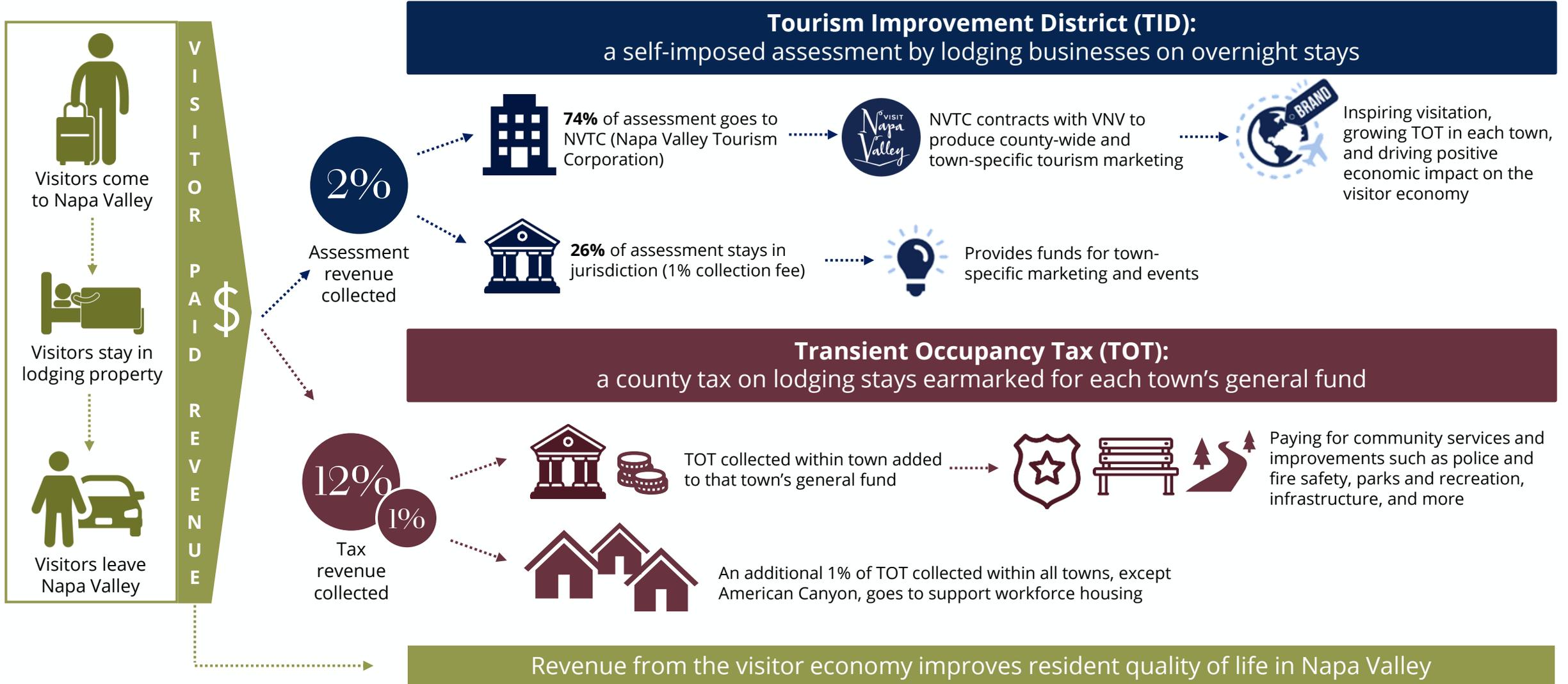
# *Tourism Matters*

PART 2

VISIT  
*Napa Valley*

# TOURISM BENEFITS NAPA VALLEY

DEMYSTIFIED: TOURISM IMPROVEMENT DISTRICT ASSESSMENT (TID) & TRANSIENT OCCUPANCY TAX (TOT)



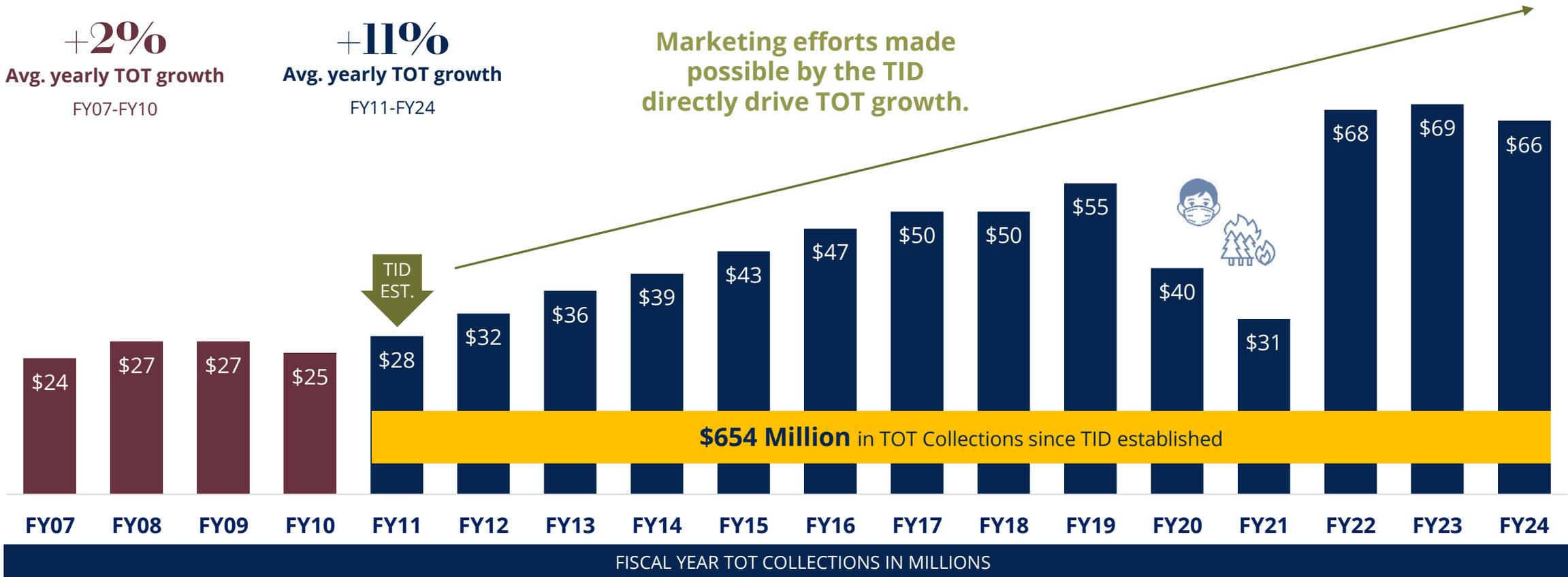
# TRANSIENT OCCUPANCY TAX GROWTH

Implementation of the TID in FY11 begins a measurable, sustained TOT growth trajectory.

**+2%**  
Avg. yearly TOT growth  
FY07-FY10

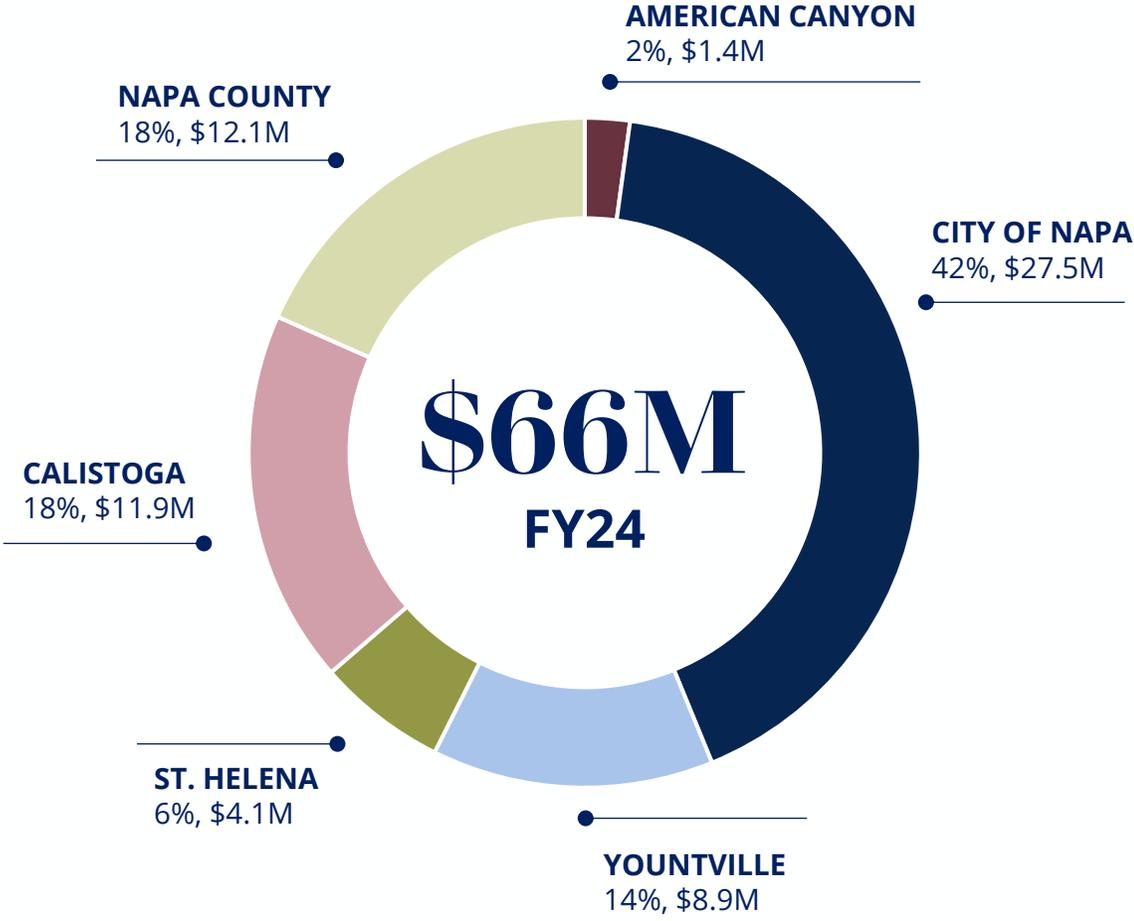
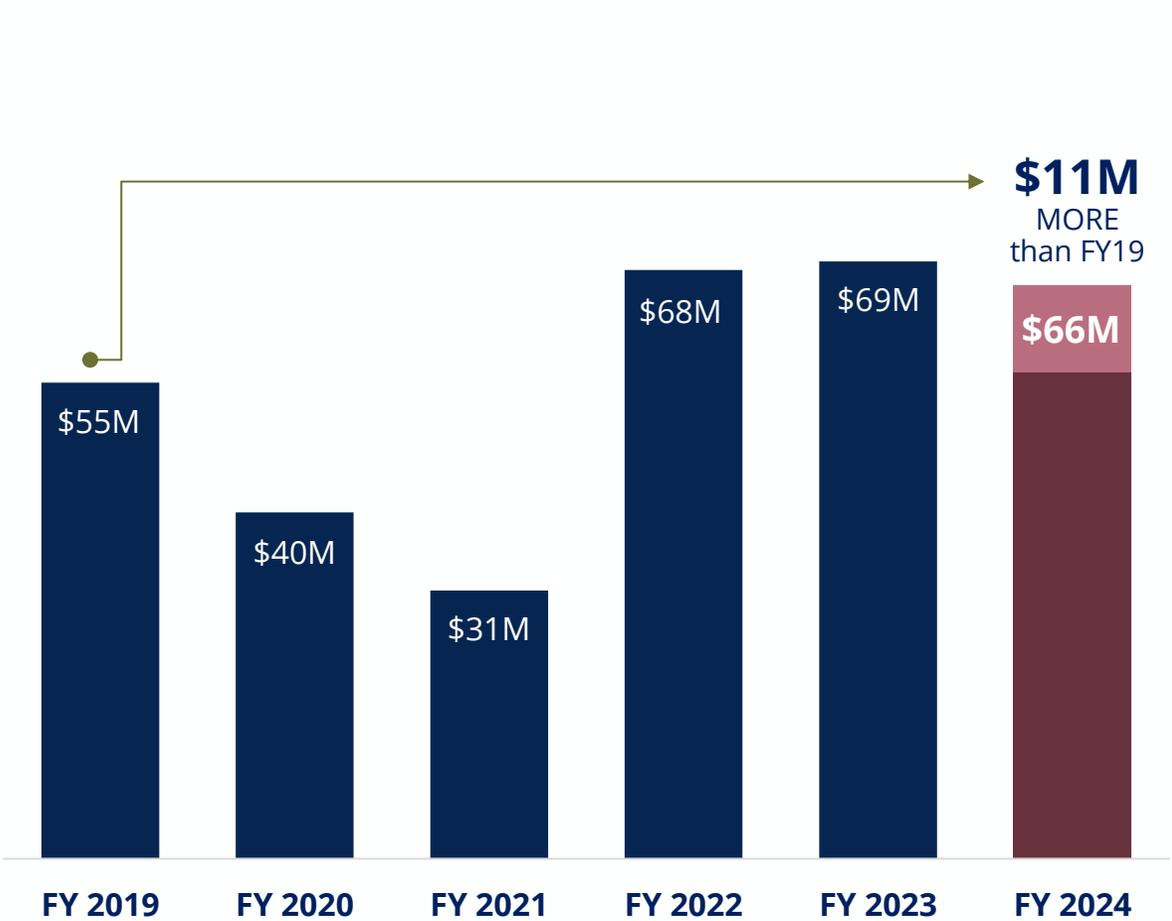
**+11%**  
Avg. yearly TOT growth  
FY11-FY24

Marketing efforts made possible by the TID directly drive TOT growth.



TOT Revenue from Lodging Guests goes directly to each town/jurisdiction general fund.

# TOT COLLECTED BY JURISDICTION



TOT Revenue from Lodging Guests goes directly to each town/jurisdiction general fund.

# TOT DETAILS BY JURISDICTION



	Population (rounded to hundreds, per US Census Bureau 2023)	# Rooms	Total TOT Collected by Jurisdiction	TOT as % of General Fund (based on FY24 Budget)	TOT Growth vs 2011
AMERICAN CANYON	21,300	313	\$1,418,744	5%	96%
CITY OF NAPA	77,500	2,759	\$27,446,063	22%	179%
YOUNTVILLE	3,400	446	\$8,924,672	66%	123%
ST. HELENA	5,300	291	\$4,020,580	22%	179%
CALISTOGA	5,100	884	\$11,882,053	66%	246%
UNINCORPORATED	21,000	763	\$12,084,035	4%	48%
<b>Total Napa County</b>	<b>133,200</b>	<b>5,456</b>	<b>\$65,776,147</b>		<b>138%</b>

TOT Revenue from Lodging Guests goes directly to each town/jurisdiction general fund.

## *Fiscal Year 2026 Board of Directors*

### AMERICAN CANYON



-Jurisdiction-  
**DAVID ORO**  
Council Member



-Lodging-  
**ERIK BURROW**  
Doubletree

### CITY OF NAPA



-Jurisdiction-  
**STEVE POTTER**  
City Manager



-Lodging-  
**SARA BROOKS**  
**VICE CHAIR**  
Napa River Inn



-Lodging-  
**JENNY TOOMER**  
River Terrace Inn

### YOUNTVILLE



-Jurisdiction-  
**BRAD RAULSTON**  
Town Manager



-Lodging-  
**MAX COMPAGNON**  
Napa Valley Lodge

### ST. HELENA



-Jurisdiction-  
**ANIL COMEO**  
City Manager



-Lodging-  
**RICK KAUFMAN**  
Harvest Inn

### CALISTOGA



-Jurisdiction-  
**DONALD WILLIAMS**  
Mayor



-Lodging-  
**DAVE ELCON**  
Solage, Auberge  
Resorts Collection

### COUNTY OF NAPA



-Jurisdiction-  
**ANNE COTTRELL**  
County Supervisor



-Lodging-  
**GEORGE GOEGGEL**  
**CHAIR**  
Auberge du Soleil

### VNV BOARD



**ED COSTA**  
Managing Director,  
Carneros Resort  
& Spa

## Executive Committee



**ED COSTA,**  
**Chair**  
*Managing Director,  
Carneros Resort  
& Spa*



**PATRICK NAYROLLES,**  
**Chair Elect**  
*General Manager,  
Meadowood Napa  
Valley*



**RICK KAUFMAN,**  
**Vice Chair**  
*Co-Owner,  
Harvest Inn*



**TODD SHALLAN,**  
**Secretary/  
Treasurer**  
*Managing Director,  
Silverado Resort  
& Spa*



**EMMA SWAIN,**  
**Past Chair**  
*CEO,  
St. Supery Estate  
Vineyards & Winery*



**NATHAN DAVIS,**  
*General Manager,  
Napa Valley  
Wine Train*



**ROBBY DELANEY,**  
*General Manager,  
Four Seasons  
Resorts &  
Residences*



**PATRICK EGAN**  
*Senior VP, Marketing  
& Communications,  
Boisset Collection*



**DAVE ELCON**  
*General Manager,  
Solage, Auberge  
Resorts Collection*



**LINSEY GALLAGHER**  
*President & CEO,  
Visit Napa Valley*



**JERI HANSEN**  
*President & CEO,  
Napa Chamber  
of Commerce*



**TODD HUMPHRIES**  
*Chef/Co-Founder,  
Kitchen Door*



**JOE LEINACKER,**  
*Managing Director,  
Meritage Resort &  
Spa*



**HEIDI MIERSEMANN**  
*General Manager  
Alila Napa Valley*



**JASON SCOGGINS**  
*Co-Founder &  
Partner, Latitude  
38/ Bottlerock*



**DAVID SHIPMAN**  
*General Manager,  
White House Napa*



**JENNY TOOMER**  
*General Manager,  
River Terrace Inn*



**RACHEL WILSON**  
*General Manager,  
Napa Valley  
Marriott Hotel &  
Spa*



# *Destination Marketing Organization Programs & Initiatives*

PART 3

*VISIT  
Napa Valley*



The official destination marketing and management organization for Napa County. We promote the region as an attractive travel destination and enhance its public image as a dynamic place to visit, live, and work.

## Vision

Elevate Napa Valley as the world's premier wine country experience.

## Mission

Promote, protect, and enhance the Napa Valley destination.





# Visit Napa Valley *Objectives*

## Cultivate the Napa Valley Brand

- Create awareness and desire to experience Napa Valley
- Deploy multi-channel storytelling efforts
- Meet the audiences where they are with their travel objectives and deliver relevant information

## Inspire and Motivate Travel

- Drive travel during need periods (November - March and midweek)
- Engage international travelers with Napa Valley value proposition vs other destinations
- Grow the Corporate Group business segment

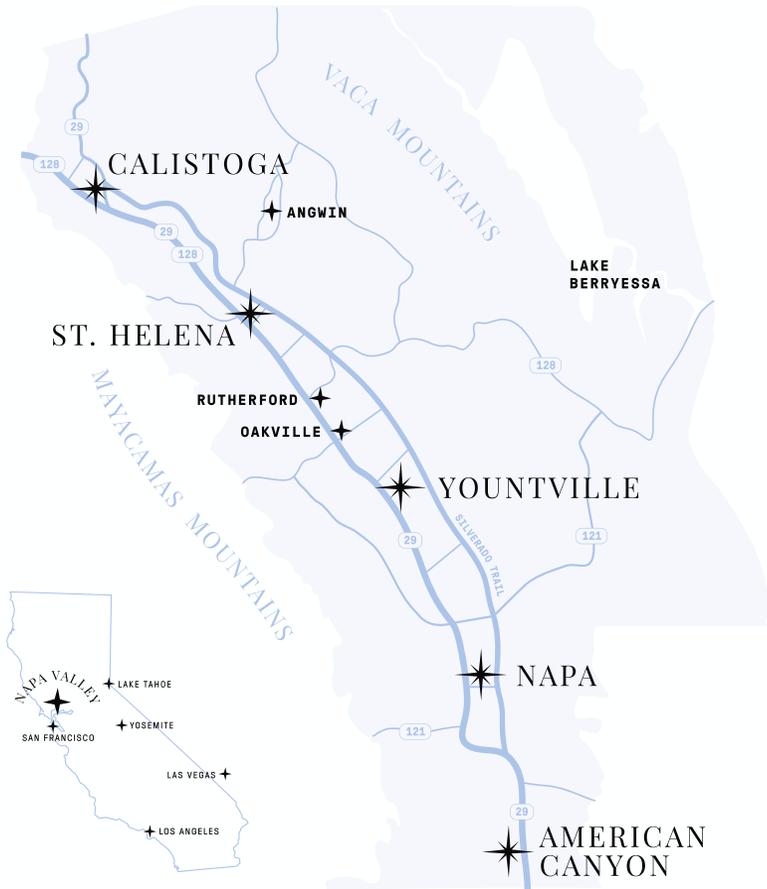
## Support the Local Industry

- Engage stakeholders to amplify a unified message about Napa Valley and experiences found within
- Communicate and advocate for the value of tourism in Napa County
- Support county-wide best-in-class destination stewardship model

# NAPA VALLEY BY THE NUMBERS



Five Distinct Towns,



One Amazing Valley

120

Overnight Accommodations  
Options

150

Restaurants

400+

Wineries Open To The Public  
Plus More Than **90 Tasting Rooms**

5,400

Lodging Rooms

By Contrast, San Francisco Has More Than  
34,000 And Sonoma County More Than  
8,300

16,000

Employed By Tourism & Hospitality

# NAPA VALLEY BY THE NUMBERS



# <200

Fewer than 200 Hotel Rooms  
Added in Last 6 Years

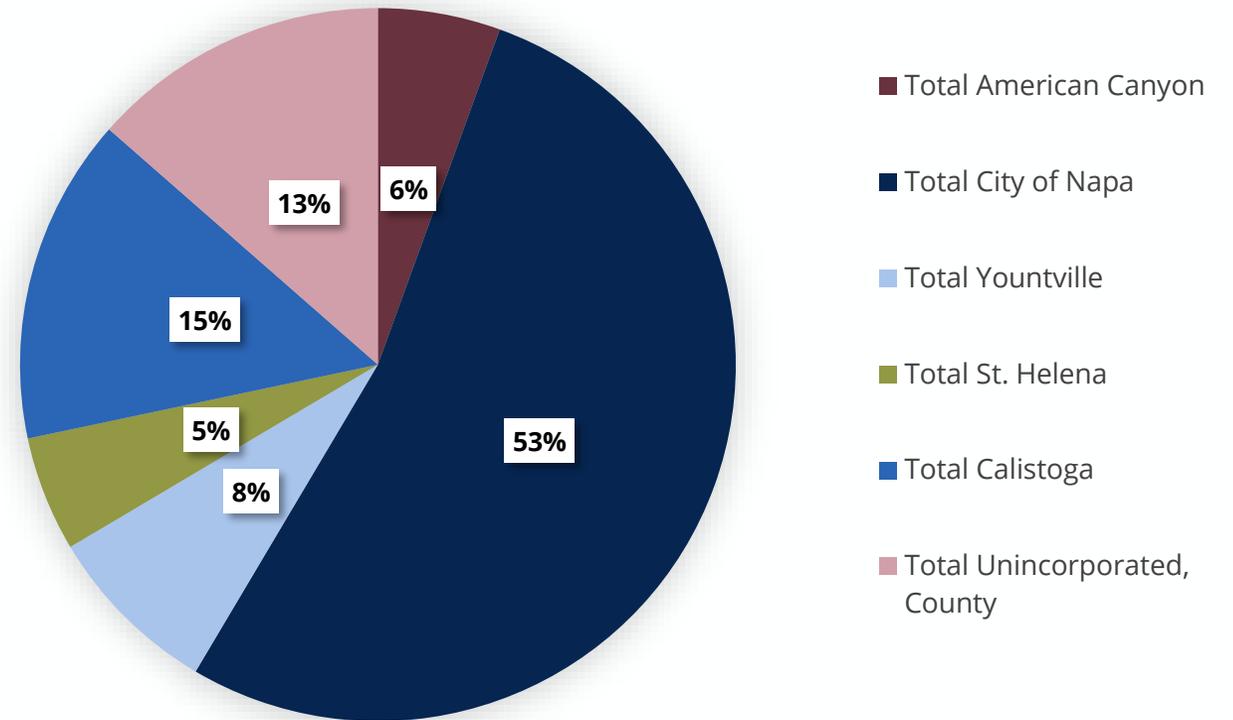
# 70

Properties with Fewer  
Than 20 Rooms

# 46

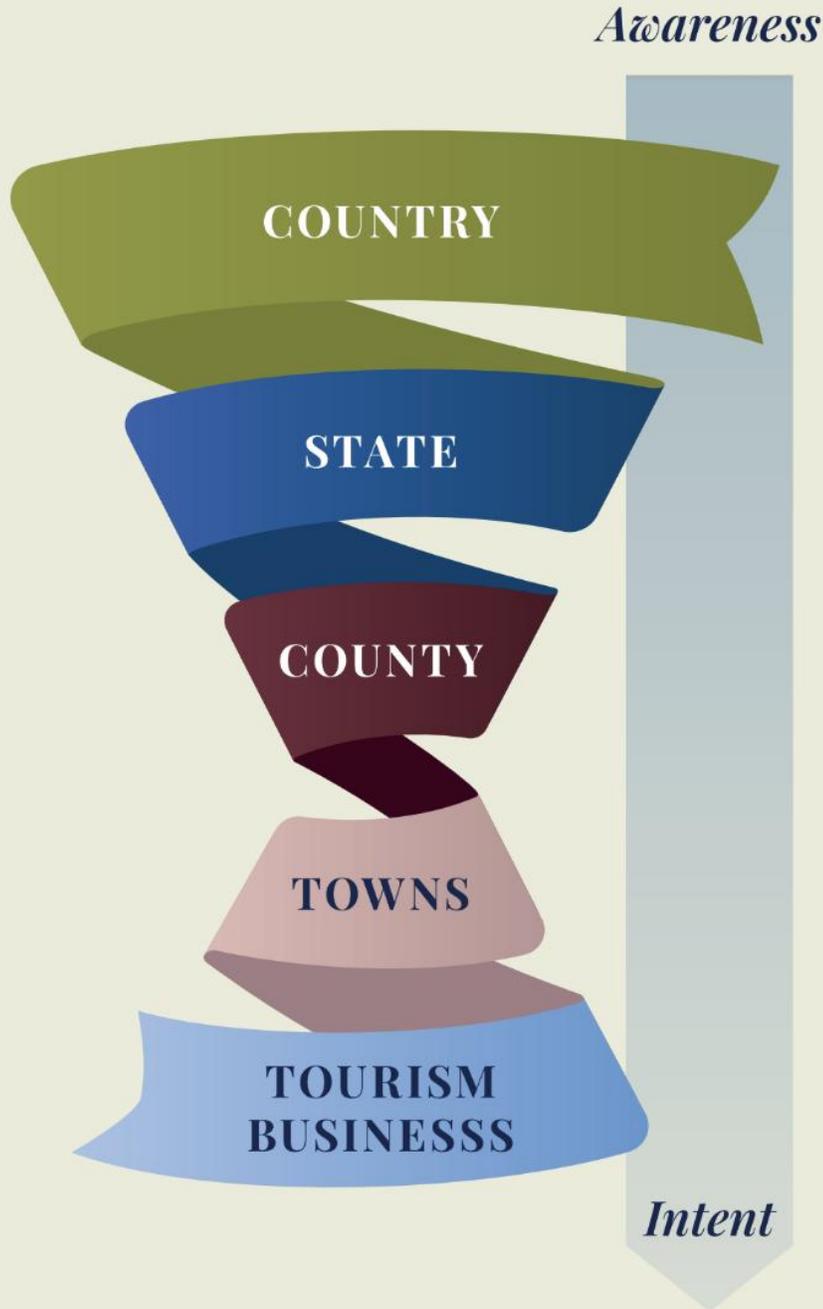
Average # of  
Rooms Per Hotel

## Total Napa Valley Lodging Rooms 5,400



# DESTINATION PARTNER *Ecosystem*

Representing the voice of the larger community, Visit Napa Valley partners with organizations on an international, national, state, and regional level to foster the greatest impact for local destination partners and tourism businesses.



Promoting the United States as a premier travel destination.



Promoting the overarching state and gateway city on a national and international scale.



Promoting the overarching valley to key near and far markets.

*The good life; to be shared, savored & discovered.*



Capitalizing on overarching Napa Valley brand.

*Unique personalities & offerings.*



Capitalizing on overarching Napa Valley brand & towns.

*Content, offers & deals from hotels, wineries, restaurants, shops, attractions, events, etc.*

# LONG RANGE PLAN FY24 – FY26



**75%**

Strategic Marketing & Sales Programs



**10%**

Collaborative Destination Management



**10%**

Proactive Partner & Community Engagement

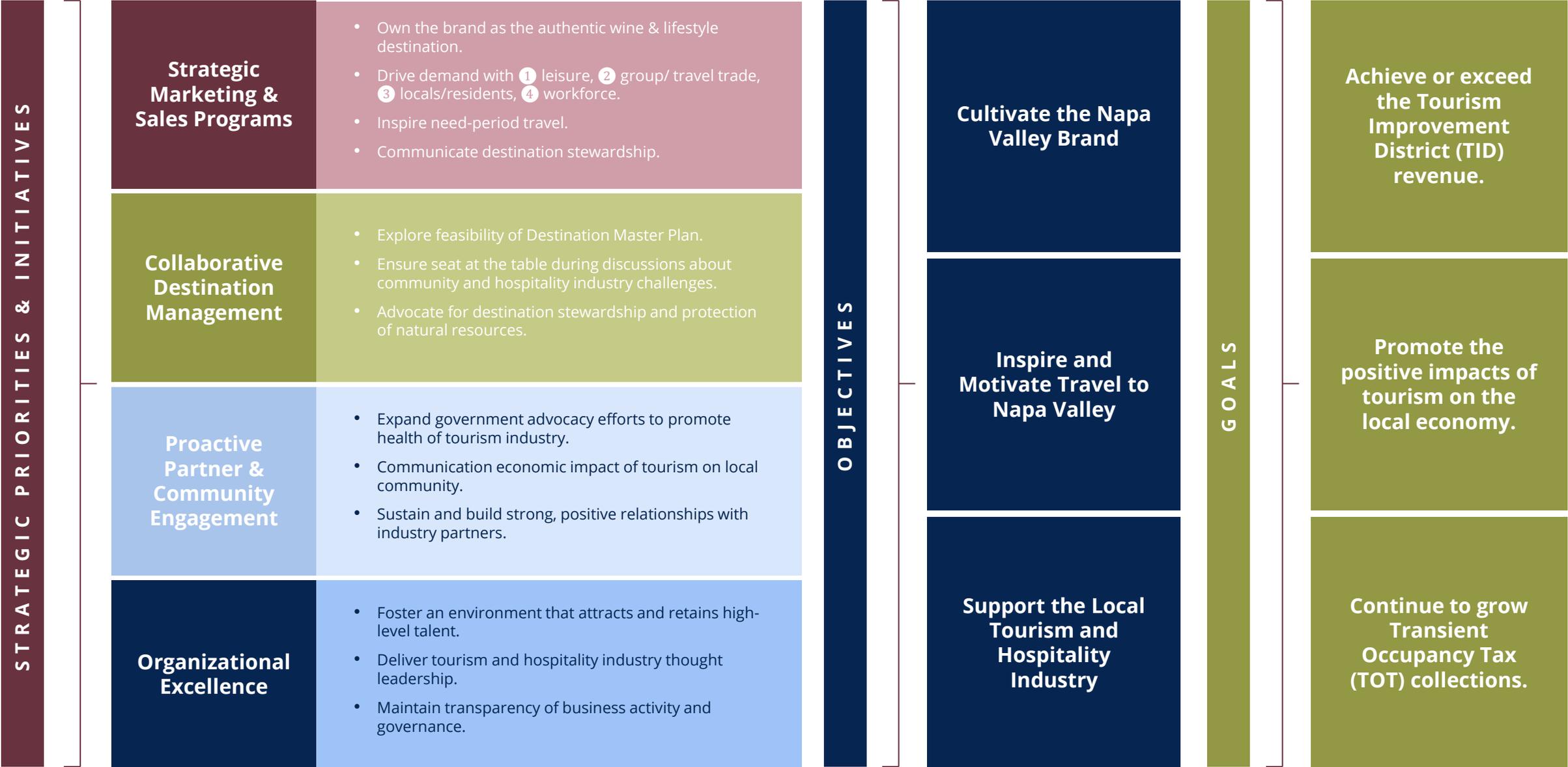


**5%**

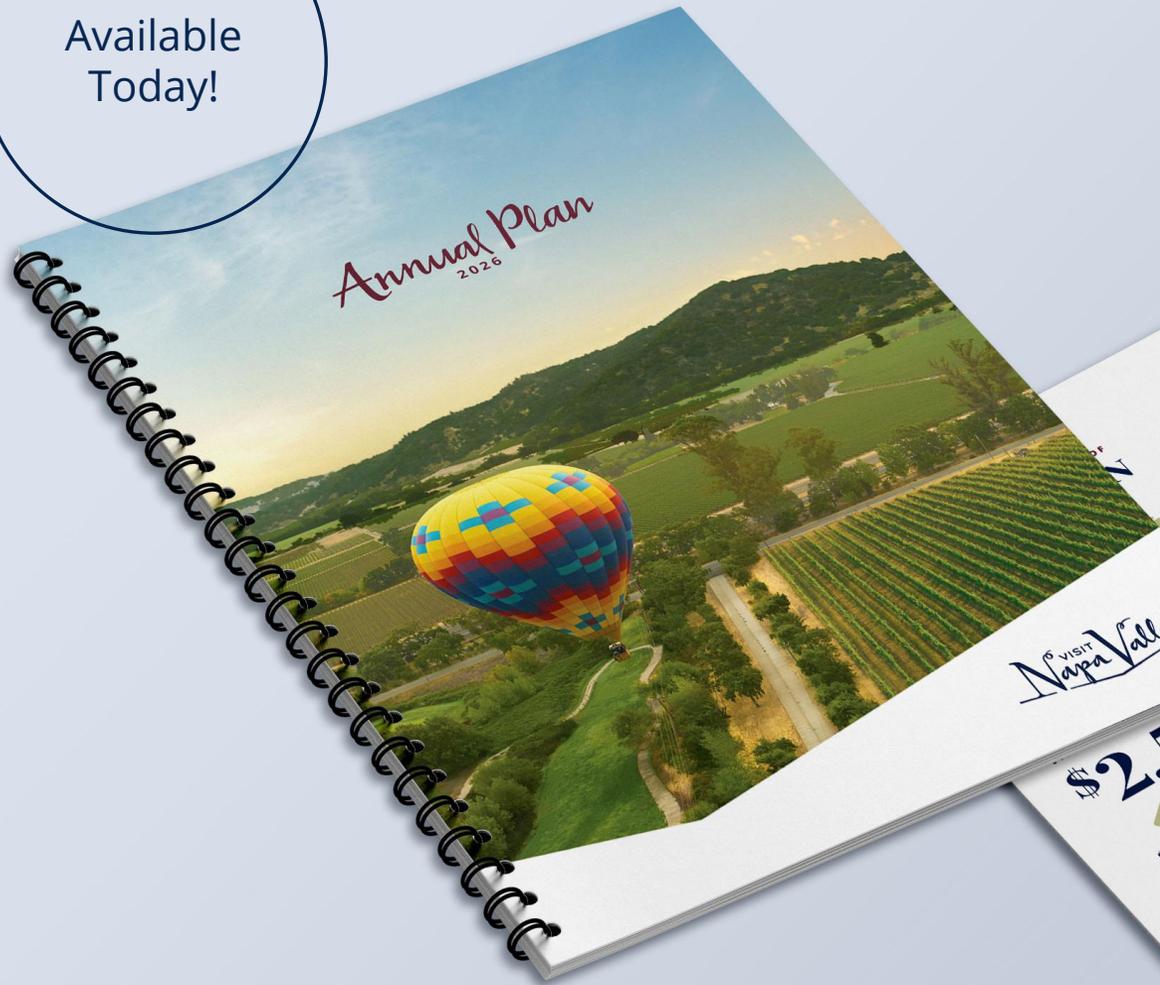
Organizational Excellence

**UPDATE COMING IN WINTER 2026**

# Mapping for the FY26 Annual Plan



Available Today!



### Market Overview / Target Audience

**Visitor Stay**  
62% DAY TRIP VISITORS  
38% OVERNIGHT GUESTS  
95% OF VISITORS ARE LIKELY TO RETURN  
3 AVERAGE VISITOR MADE TRIPS TO NAPA VALLEY IN THE PAST 12 MONTHS

**Direct Visitor Spending**  
INCREASED BY 13% VS. 2018  
\$1.7 MILLION SPENT BY OVERNIGHT HOTEL GUESTS  
\$84 MILLION SPENT BY NON-HOTEL GUESTS

**66% OF SPENDING WAS GENERATED BY OVERNIGHT GUESTS**

**Visitor Spending**  
THE TOP 10 INDUSTRY SPENDERS ARE ESTIMATED TO SPEND ON A TYPICAL VISITOR:  
\$7 MILLION  
TAX REVENUE INCREASED OVER 2018  
↑26%

**Visitor Economy**  
NAPA VALLEY VISITOR ECONOMY GENERATED \$107.5 MILLION IN TAX REVENUE FOR LOCAL SERVICES

**Supporting Local Businesses**  
\$2.5 BILLION SUPPORTING LOCAL BUSINESSES SUCH AS:  
\$830M RETAIL & WINNERS  
\$686M LODGING  
\$541M RESTAURANTS

**Local Services**  
PARKS & RECREATION  
PUBLIC SAFETY  
ROAD IMPROVEMENTS  
OTHER SERVICES

**Target Markets**

**Primary Markets:** CALIFORNIA, TEXAS, NEW YORK

**Secondary Markets:** ARIZONA, COLORADO, FLORIDA, ILLINOIS, OREGON, WISCONSIN, WASHINGTON

**Target Audiences:** Luxury Aspirational, Local/Resident, Group/Travel Trade, Workforce

# VISIT NAPA VALLEY DMO TEAM



**Linsey Gallagher**  
President & CEO

## SALES & BUSINESS DEVELOPMENT



**Becky Barrango**  
Director



**Hannah Redding**  
Manager



**Victoria Riyazi**  
Manager

## PARTNER RELATIONS & EVENTS



**Nichole Peterson**  
Director



**Melisa Maczko**  
Associate

## MARKETING



**Janette Maack**  
Associate Director



**Leslie Miller**  
Manager, Data & Insights

## COMMUNITY & INDUSTRY RELATIONS



**Rachel Miers**  
Director



**Linsey Gallagher**  
President & CEO

## EXECUTIVE ADMINISTRATION & OPERATIONS



**Teresa Coleman**  
Controller



**Pilar Gonzalez**  
HR Business Partner



**Yesenia Gonzalez**  
Sr. Associate, Finance



**Kali Kirschman**  
Executive Assistant

## NAPA VALLEY WELCOME CENTER



**Adriana Vargas**  
Mercantile Manager



**Leslie Jessop**  
Guest Experience  
Manager



**Melissa McGreevy**  
Guest Experience  
Associate



**Leila Millan**  
Guest Experience  
Associate



**Maggie Montgomery**  
Guest Experience  
Associate



**Loretta Radey**  
Guest Experience  
Associate

All Visit Napa Valley departments work together to drive awareness and affinity

*...at all touchpoints  
...on all channels*

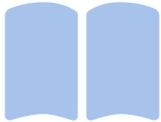


# MARKETING & COMMUNICATIONS *Fy2025 Highlights*

## WELCOME CENTER

 **104,000**  
ANNUAL VISITORS

## VISITOR GUIDE

 **65,000**  
COPIES DISTRIBUTED

## DIGITAL & PRINT ADVERTISING

 **81 MILLION**  
CAMPAIGN IMPRESSIONS

## WEBSITE & EMAIL

 **3.1 MILLION**  
ANNUAL WEBSITE VISITS

 **71,000**  
EMAIL SUBSCRIBERS

 **1,200,000**  
PARTNER WEBSITE REFERRALS

## SOCIAL MEDIA



**32 MILLION**  
IMPRESSIONS

**450,000+**  
FOLLOWERS

## MEDIA RELATIONS

 **560 MILLION**  
NATIONAL RADIO  
BROADCAST IMPRESSIONS

 **1.3 BILLION**  
EARNED MEDIA  
IMPRESSIONS

# ORGANIZATIONAL *Fy2025 Highlights*

## GROUP SALES



**\$78 MILLION**  
ECONOMIC IMPACT



**191,000**  
ROOM NIGHTS



**768**  
MEETING LEADS  
DISTRIBUTED



**90,000**  
DELEGATES

## TRAVEL TRADE



**940 +**  
PARTNER REFERRALS

## PARTNERSHIP



**550 +**  
TOTAL PARTNERS



**6,660**  
PORTAL LOGIN  
SESSIONS



**132**  
PARTNER  
INFORMATION  
MEETINGS



**24**  
PARTNER  
VISITS



# *Keynote*

PART 4

VISIT  
*Napa Valley*



# Lynn Carpenter

---

**Senior Vice President**  
Marketing  
Visit California



# visit★ California

- Officially formed in 1996
- Nonprofit 501(c)6
- 16,500+ assessed businesses
- Mission: create desire for the California experience
- 37-member board of directors





**Our Mission:**  
Create desire for the California experience

# Board Leadership





# 2025 Marketing Renewal Referendum

USA

visit  
**California**

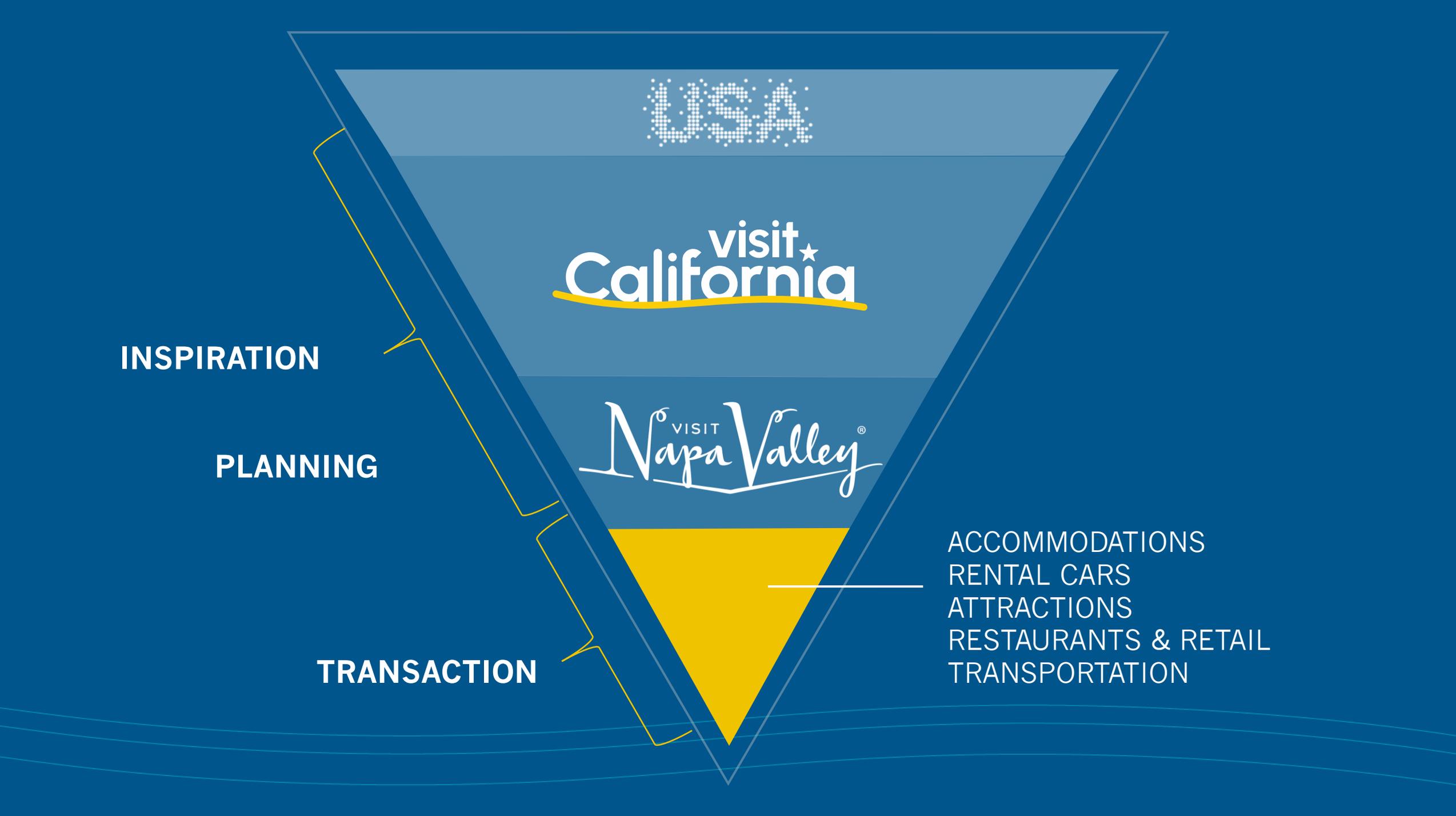
**INSPIRATION**

**PLANNING**

VISIT  
*Napa Valley*

**TRANSACTION**

ACCOMMODATIONS  
RENTAL CARS  
ATTRACTIONS  
RESTAURANTS & RETAIL  
TRANSPORTATION





# State of Tourism

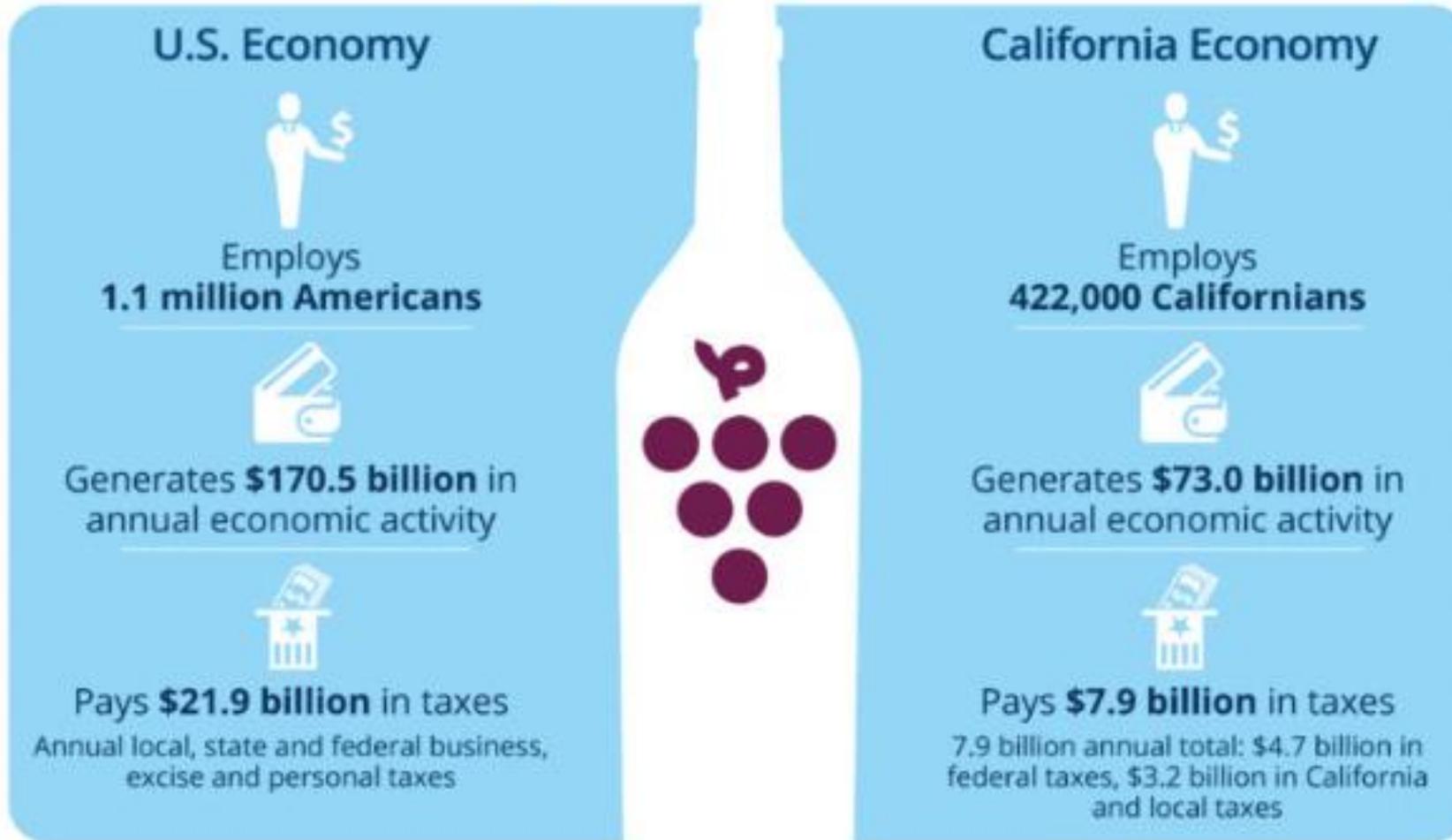
# 2024 Economic impact of travel in California

2024

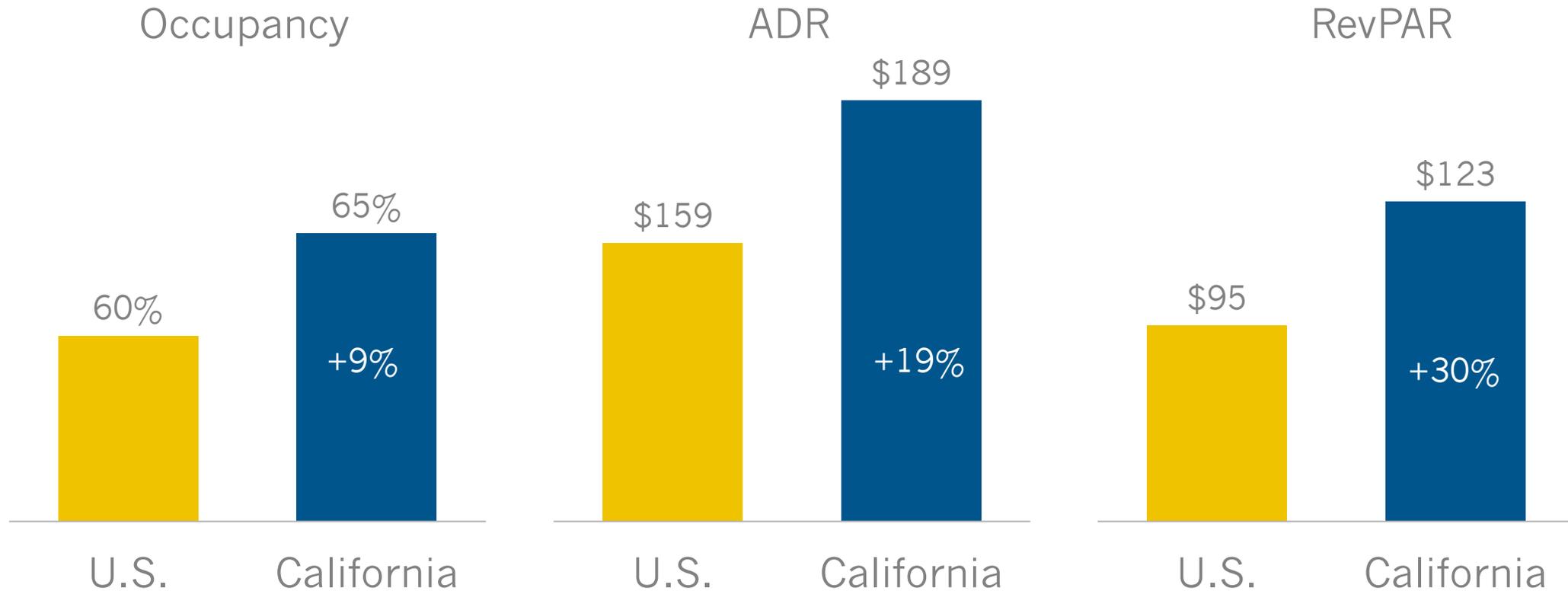
Visitor spending	<b>\$157.3</b> billion	+3% YOY
Tax revenue	<b>\$12.6</b> billion	+3.1% YOY
Jobs	<b>1.16</b> million	+2.1 % YOY (+23,950 jobs)

Source: Dean Runyan Associates

# Economic Impact of California Wine

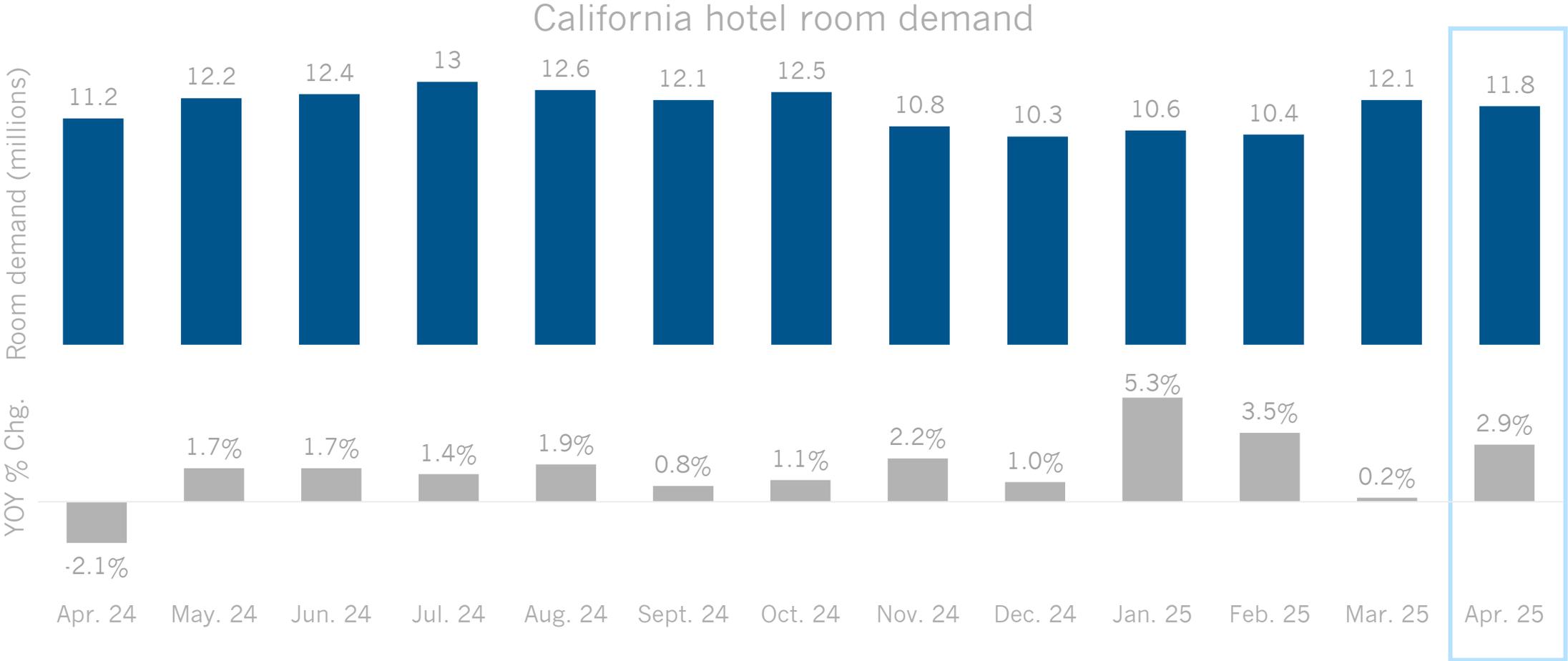


# California Lodging Outperformed U.S.



Source: CoStar (April 2025 YTD)

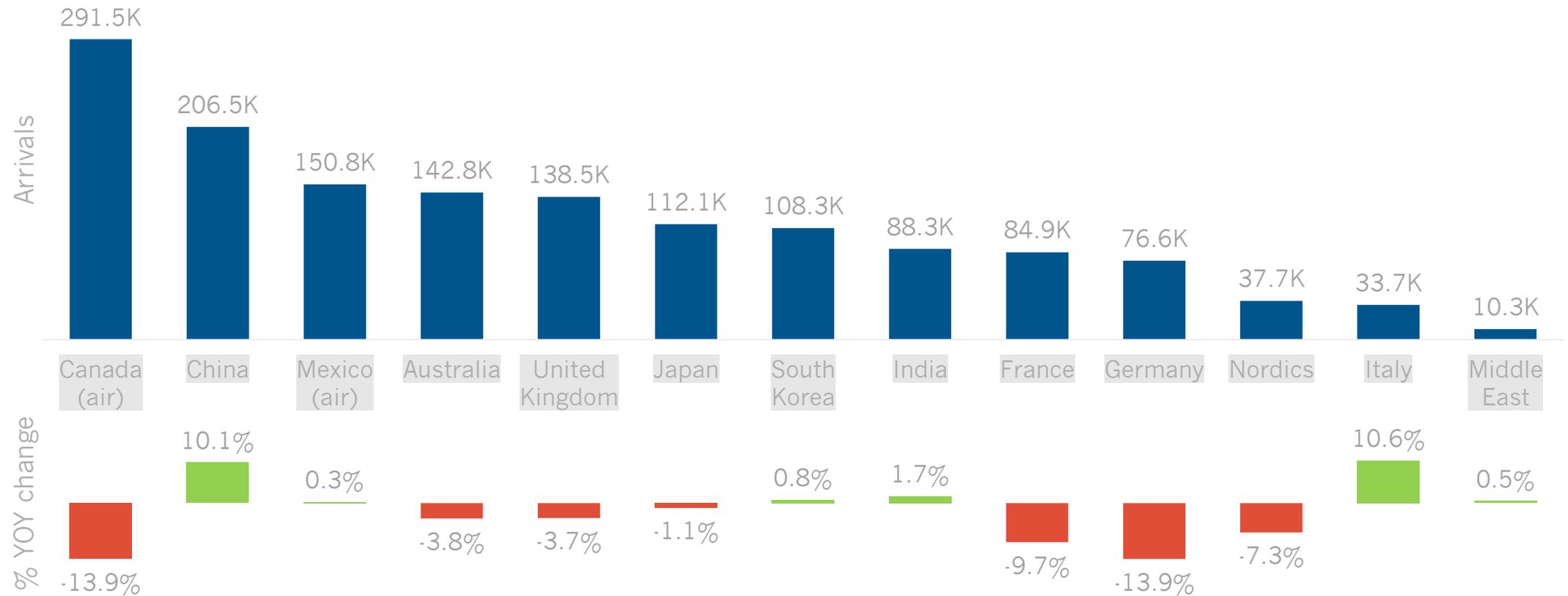
# California Hotel Room Demand Up



Source: CoStar (April 2025)

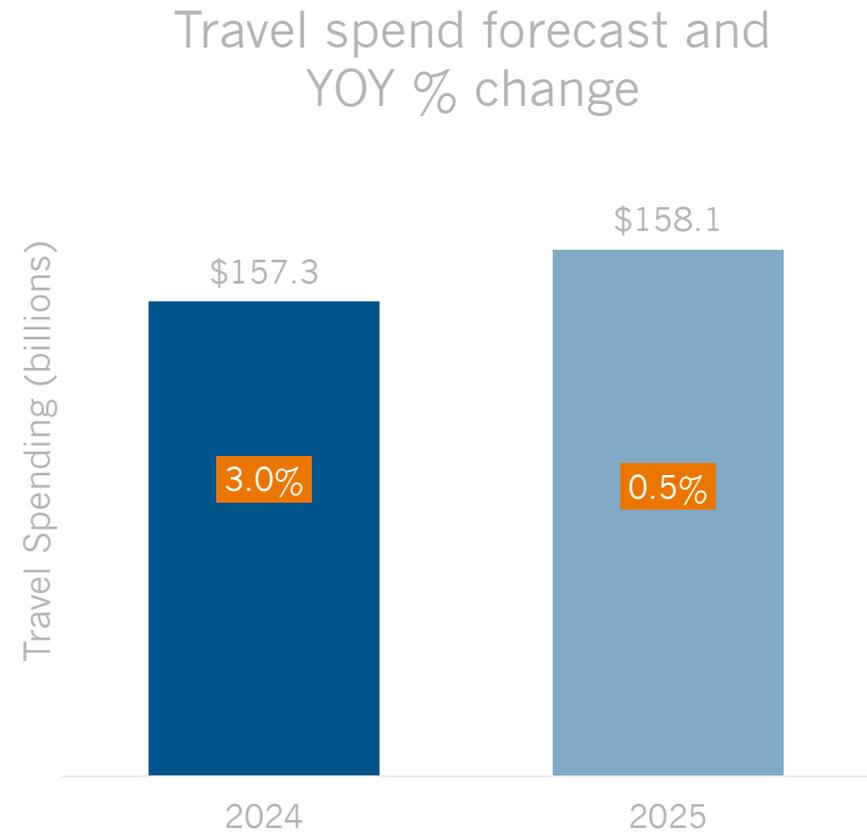
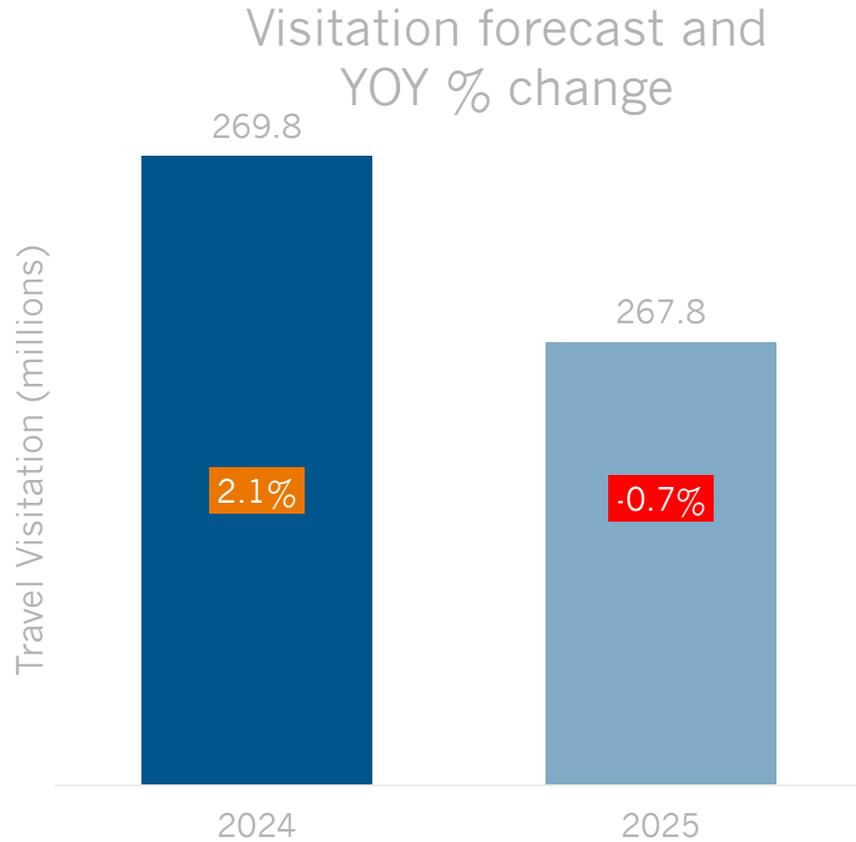
# April YTD: International Arrivals to California

California non-resident arrivals – Port of entry



Source: NTT/CIC Research (April 2025)

# California 2025 Forecast (total)



Source: Tourism Economics (May 2025)

# California Visitor Volume Forecast

	2024 actual	2025 forecast	YOY % change
Total visits	269.8M	267.8M	-0.7%
Domestic	253.0M	252.5M	-0.2%
International	16.8M	15.3M	-9.2%

Sources: Tourism Economics; STR; Longwoods (domestic); OAG (air traffic); NTTO (international); Dean Runyan (spending); BTS



# California's Brand Update



# THE ULTIMATE PLAYGROUND

Play enriches our lives, giving us energy, perspective, and joy.  
California is the Ultimate Host for your travels, inviting the spirit of play in everyone.

## DELIVER

the California brand message to travelers at scale.

## STRENGTHEN

brand affinity and intent.

## PROTECT

brand health and negate tarnish.

# FY 25/26 planning documents



**Strategic Framework**  
Insights and roadmap



**Marketing Work Plan**  
FY 25/26 program of work

# The Ultimate Playground

Let's Play

*General*



Golden State of Luxury

*Luxury*



Playful Journeys

*Road trips*



# ‘Let’s Play’

- FY 24/25 media plan
  - \$24 million media buy
  - 1.53 billion impressions



**LET'S  
PLAY★**



# ‘Up Around the Bend’

- March 3 launch
- \$12.6 million investment
- March 3-June 30



**PLAYFUL  
JOURNEYS**

# Luxury Task Force



THE  
**LUXURY**  
COLLECTION

*West  
Hollywood*

*Montage*



P/S



*etc*  
HOTELS



*Fairmont*  
HOTELS & RESORTS

VISIT  
*Napa Valley*



visit  greater  
palm springs  
find your oasis



 FARMHOUSE INN

PASSPORT RESORTS



# The Luxury Approach

---

- **Affluent Market Focus:** Reach Ultra High Net Worth, High Net Worth, and Aspirational Luxury Consumers.
- **Global Positioning:** Showcase California as a premier global luxury destination under the “Golden State of Luxury” sub-brand.
- **Luxury Advisor Relations:** Luxury travel advisors are the primary influencers guiding where affluent travelers choose to spend their time and resources.
- **Strategic Engagement:** The program activates through curated networking events, trade shows, and B2B partnerships.
- **Content & Inspiration:** Inspirational and educational content highlights California’s distinctive luxury experiences—positioning the state not just as a destination, but as a lifestyle to aspire to.

# The Evolving Luxury Traveler

---

## Aspirational Luxury Travelers Offer New Opportunity

- Net worth: \$250K–\$1M (Millennials & Gen Z)
- Splurge on milestones & once-in-a-lifetime experiences
- Segment is 2.5x larger than UHNWI + HNWI combined
- Consistent growth = opportunities for California

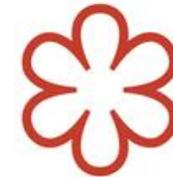


# *Golden State of Luxury*

*“In California, luxury is like a golden thread elegantly woven throughout the diverse and unrivaled natural beauty of the destination—an impressive array of thoughtfully curated, tailored, and playful travel experiences waiting to be discovered and enjoyed. This golden thread seamlessly connects discerning travelers with a unique style of luxury, one guided by a relaxed approach to the elevated and extraordinary, playful, uncomplicated and free of pretense but full of passion, adventure and innovation.”*

# Culinary

- Work at all levels of the restaurant and agricultural industry through influencer, media and partnership marketing
- FY 24/25 exposure
  - \$1.3M in Paid Media
  - 72.4 million Impressions
- Industry Partnership – Michelin
  - \$1.07M investment



MICHELIN

EATER



Tripadvisor





# Michelin

- Expand restaurant reviews statewide
- Elevate California's culinary industry
- Maintain ongoing industry engagement
- Rights to Michelin editorial content and branding for collaboration across owned channels

# THE ULTIMATE PLAYGROUND.



Urban Adventures Family Fun Culinary Experiences Arts & Culture Outdoors

## Sip Napa Valley's Sought-After Wines in Unexpected Settings

With its impressively diverse range of soils, Napa Valley's dreamy landscapes are more than a stunning sight—the sprawling fields here are naturally primed to grow impeccable wine grapes. While the region's historic wineries deliver the quintessential Napa experience, offbeat wine tastings offer new ways to uncork and explore—from animal sanctuary sips to art-laden lounges with a Spanish twist.



MICHELIN

**Press Restaurant**

4.4 (845)



**Chimney Rock**

4.3 (218)

Wineries & Vineyards



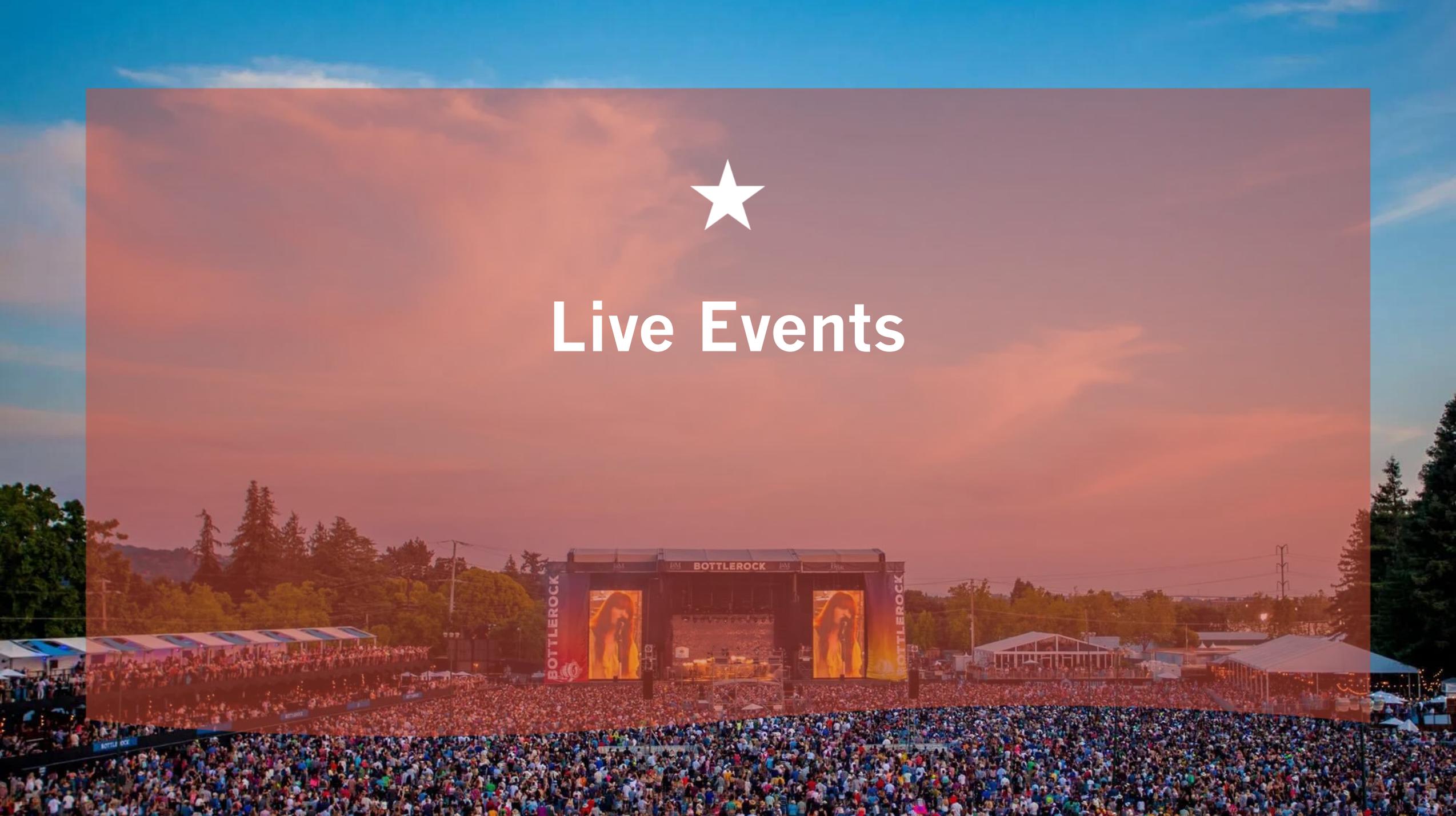
**Artesa Vineyards & Winery**

4.4 (1,125)

Wineries & Vineyards



# Live Events



# Live Events Strategy

Harness live events to strengthen brand health, showcase California as the epicenter of cultural relevance, and spark travel intent.

## Global



## National

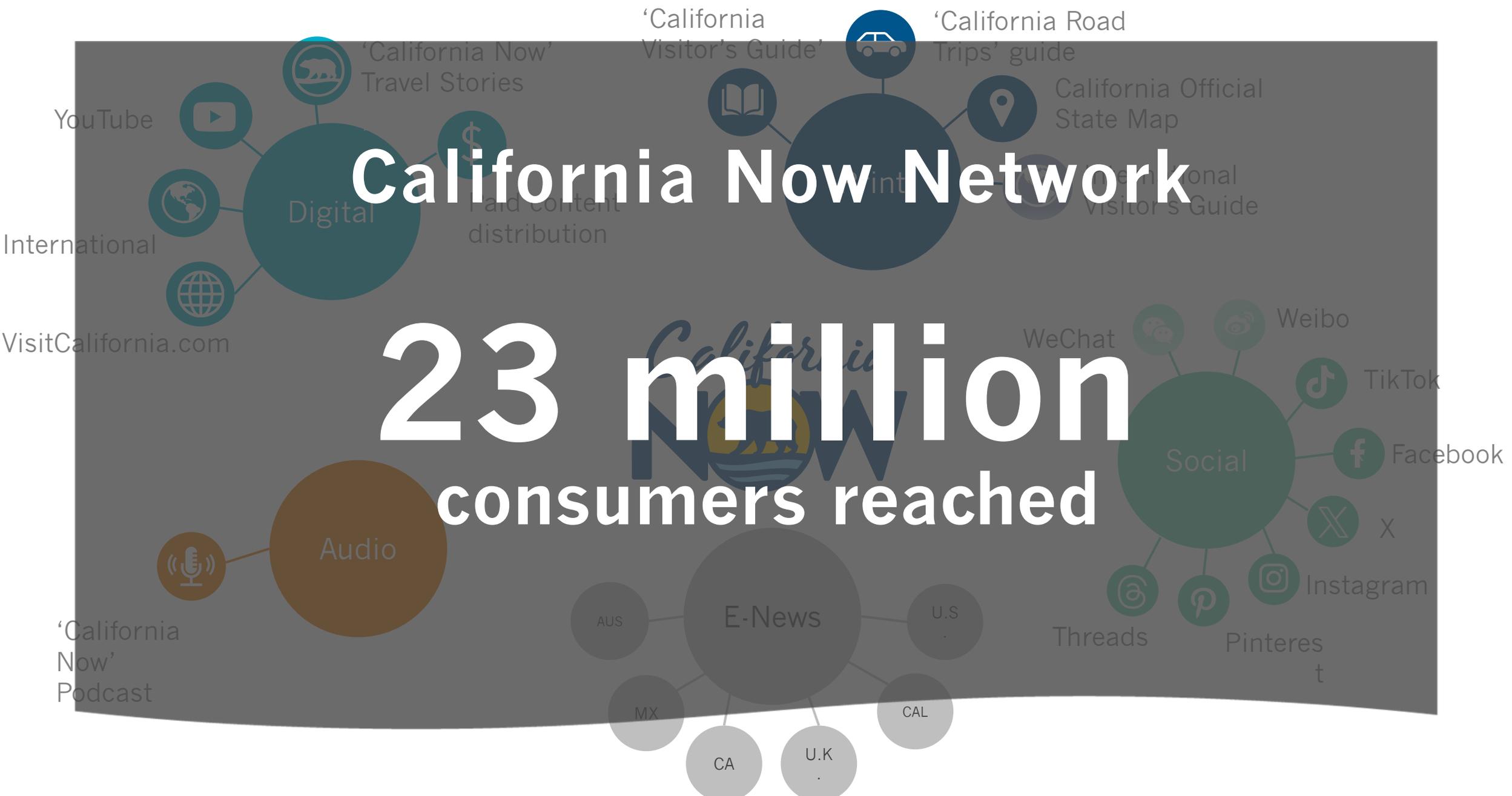


## Local & Regional



# California Now Network

23 million consumers reached

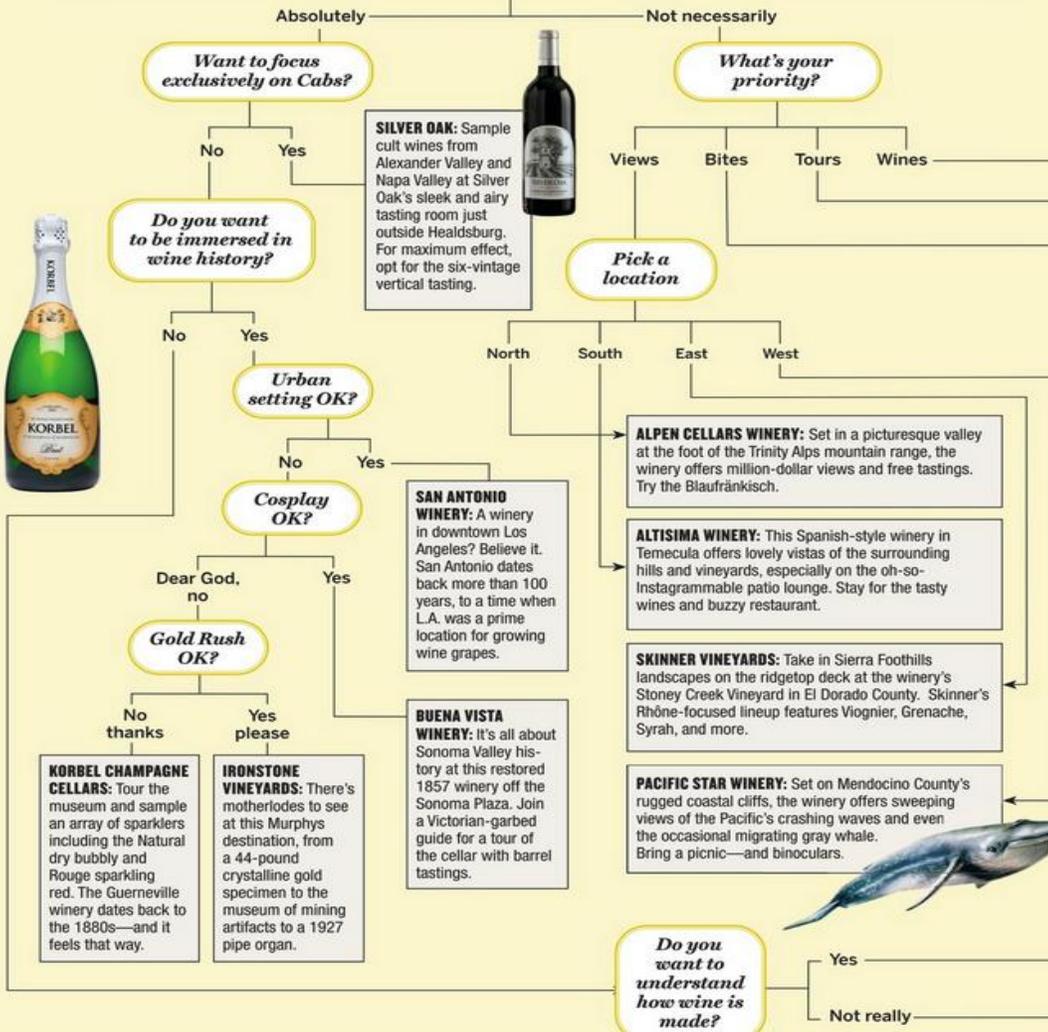


# Print & Digital Guides



# Beginner

## Are you looking to boost your wine knowledge?



PHOTOS: STYLING: CHRISTINA WILSON; FOOD: MARISSA WILSON; SILVER OAK: GETTY IMAGES; COURTESY SILVER OAK; WHALE: SHUTTERSTOCK/ALAMY.COM; KORBEL: STEVEN WILSON

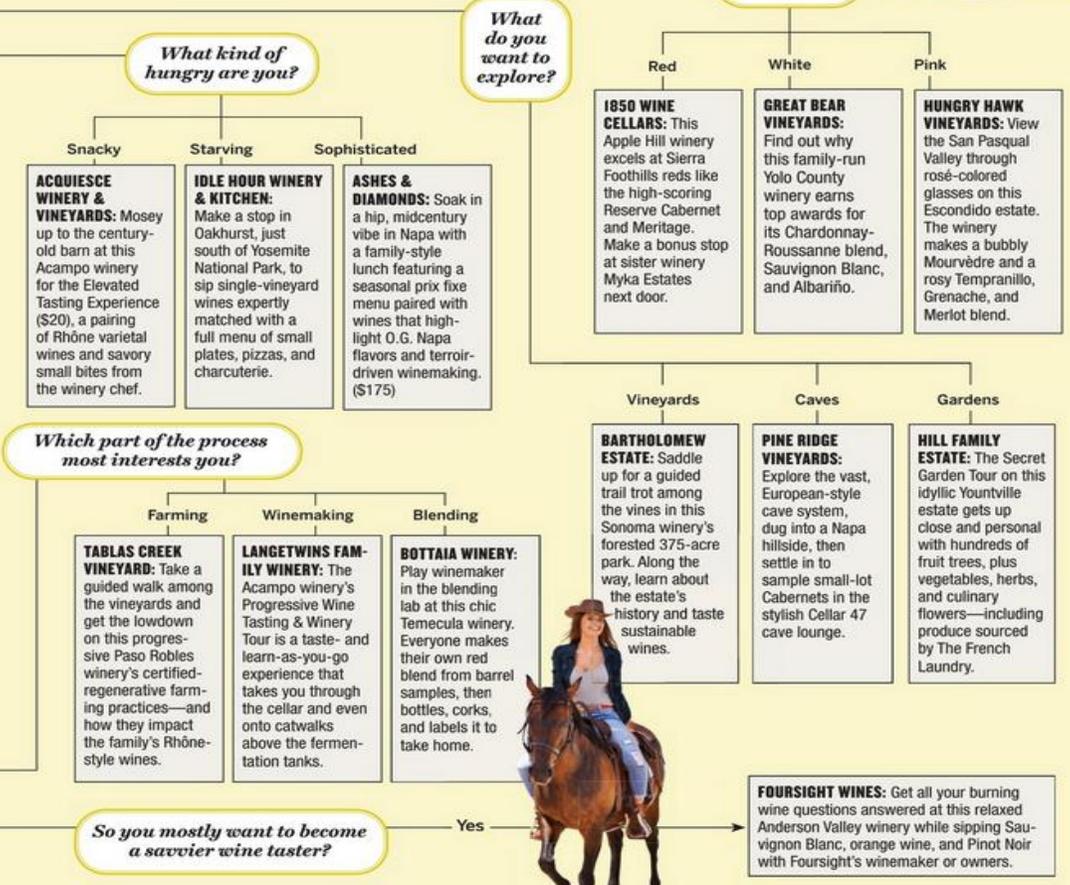


Silver Oak

Playful  
Serious



What do you like to drink?



EXPERIENCES / HOW TO SPEND A PERFECT WEEKEND IN THE NAPA VALLEY

# How to Spend a Perfect Weekend in the Napa Valley

Culinary delights are only the beginning in this 48-hour itinerary that includes a train ride, sophisticated shopping, and mineral pools



The **Napa Valley** unfolds like a vintner's dream: a 30-mile stretch of fertile land cradled between two mountain ranges, where world-class wines, innovative cuisine, and **luxurious resorts** create a sumptuous destination for those seeking the finer things in life. While its reputation was built on wine—some of the world's most celebrated Cabernet Sauvignons are produced here—**today's valley** offers much more than exceptional tastings.

This itinerary begins in the south with the city of **Napa**: Once a sleepy river town, it's now a vibrant cultural hub with a thriving arts scene and innovative dining options. As you travel north along Highway 29 and the parallel Silverado Trail, each community reveals its own distinct character: sophisticated **Yountville** with its constellation of Michelin stars, historic **St. Helena**'s refined charm, and **Calistoga**'s laid-back vibe and healing hot springs. Here's how to experience the best of the valley in just 48 hours.

## Official Resources

Visit Napa Valley

ADVERTISEMENT

# A Perfect Weekend in Napa Valley

The video and accompanying article feature 30+ destinations, attractions, hotels, restaurants, and businesses throughout Napa Valley

# Extended Reach on Social



A Perfect Weekend in Napa Valley Social Video



Napa Valley Wine Train Social Post



Charter Oak Social Post

**32**  
Total posts featuring Napa Valley

**1.8M**  
Total Views

**65K**  
Engagements

3/21/2025 - 9/24/2025

# Napa Valley Showcased Through Storytelling

visitCalifornia Places To Visit Things To Do Trip Inspiration Road Trips More

Travel Alerts

8-WEEKLY PODCAST

## WINE TASTING IN CALIFORNIA

49 MIN • A YEAR AGO

Get insider tips on California wine tasting, discover offbeat wine adventures, and find hidden gems in the Sierra Foothills

CALIFORNIA NOW PODCAST

Wine Tasting in California

30+ 00:00:00 +30

PODCASTS

### Wine Tasting in California

Food & Drink Wine

On this episode of the California Now Podcast, host Soterios Johnson taps into the wine tasting prowess of three wine experts.

First up, Johnson chats with Lucy Simon, assistant wine editor at Food & Wine magazine. Simon offers valuable tips for novices looking to up their California wine-tasting skills. "Taking a breath, letting loose a little bit and being honest with your likes and dislikes is the best way to have a positive wine-tasting experience," advises Simon. She also shares her top recommendations for tasting rooms in Healdsburg, Napa Valley, Paso Robles, and beyond, guiding first-timers through the best spots to start their wine journey.

Next, Johnson is joined by Tina Caputo, a writer known for her extensive knowledge on the Golden State's food and wine scenes. Caputo dives into California vineyards and wineries offering out-of-the-ordinary wine-tasting excursions: "Obsidian Ridge vineyard, which is up in Lake County, does a volcano adventure that is led by a professional geologist," Caputo says. She also gets into more playful wine tours that offer such activities as baby goat petting in Lodi and sound bathing in the Anderson Valley.

Finally, Johnson talks with Mary Orlin, a certified sommelier and co-host of the Sip, Sip, Hooray! Podcast. Orlin goes deep on the Sierra Foothills wine region, a historic, hidden gem viticultural

SUBSCRIBE

My California Trip

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Travel Alerts

EXPERIENCES / CALIFORNIA QUESTIONNAIRE: JERRY RICE

## California Questionnaire: Jerry Rice

The San Francisco 49ers' Hall of Fame wide receiver knows where to catch all the best experiences in the Golden State

Jeff Bayer

ADVERTISEMENT

**Jerry Rice** has won three Super Bowl championships and is one of the NFL's most revered athletes. Fans far and wide insist he's the best to ever play the sport and, fittingly, Rice made it into the Pro Football Hall of Fame in 2010, the first year he was eligible.

The reigning NFL touchdown and receptions leader boasts 36 league records in all, and he has achieved similar success off the field. The proud dad of four has daffily tackled ABC's *Dancing with the Stars* competition (placing second), won over new fans as a popular sports broadcaster, and he's been a tireless champion of several charities and community programs, including his own [Jerry Rice 127 Foundation](#) and [The 49ers Foundation](#), for which he serves as honorary chairman.

Here, the football legend runs down everything from his go-to golf courses and restaurants to his top shopping destinations.

**Where do you live?** I live in [Atherton](#). It's a great location because it is in between [San Francisco](#) and [Santa Clara](#). I've lived in what we call the [Peninsula](#) area ever since I moved to California.

My California Trip

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EXPERIENCES / NAPA VALLEY WINES & WINERIES

## Napa Valley Wines & Wineries

Discover Napa's AVAs—iconic wineries, caves, tours, and tastings

My California Trip

Think Napa Valley, and most wine lovers think Cabernet Sauvignon and Chardonnay. Indeed, the Napa Valley is a single appellation, or AVA (American Viticultural Area). Yet within its borders reside 16 sub-appellations, each with its own distinctive microclimate, and often, its own signature grapes.

At the cool, breezy southern end, the Carneros AVA shines with Pinot Noir, Chardonnay, and méthode traditionnelle sparklers—[Domaine Carneros](#) and [Artesa](#) are standout stops for terrace views and polished tastings.

The [St. Helena AVA](#), by contrast, is warm and sun-drenched, with less fog or wind than its southern neighbors. Home to the [Rutherford Wine Company](#), [HALL ST. HELENA](#) (California's first LEED Gold Certified winery), and many others on the celebrated Silverado Trail, it supports a wide range of varieties in addition to Cabernet Sauvignon and Chardonnay, including Cabernet Franc, Merlot, Syrah, Zinfandel, Sauvignon Blanc, and Viognier.

Other estates that have turned the variations of Napa Valley terroir into signature pours are legion (this is Napa, after all). Deserving starting points include the [Fleury Estate Winery](#), which has three vineyards in three appellations at three elevations; [Darioush Vineyards](#), where an appreciation for Bordeaux-style blends lends itself well to the grapes that come from such

### Official Resources

- Visit Napa Valley - wineries
- Discover California Wines - Napa Valley
- Visit Napa Valley - Hotels
- Castello di Amorsara

My California Trip

Privacy - Terms

# California Welcome Centers

- 22 California Welcome Centers
- 1.4 million visitors in 2024
- New Half Moon Bay center opened this summer



# Support Visit California's renewal

[renew.visitcalifornia.com](https://renew.visitcalifornia.com)

visit California  
Forward Together

VOTING INFORMATION

JOIN THE COALITION

## Renewal Referendum

Forward Together

**Yes, I Support the Visit California Renewal!**

You may list me as a coalition member.

[SIGN UP](#)



**Thank You!**



# *Paid Media*

PART 5

VISIT  
*Napa Valley*



# Amanda Moul

---

**Vice President**  
Account Management  
The Shipyard Agency



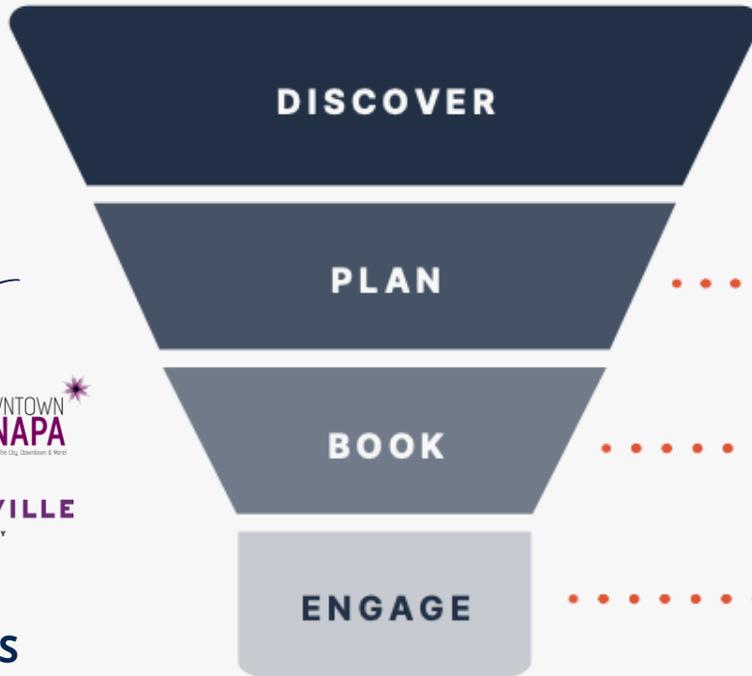
# CHEERS TO OUR PROGRESS & THE NEXT CHAPTER



# Ecosystem IN ACTION



**TOURISM  
BUSINESSES**



Before consumers start planning the first details of their trip, they fantasize about their dream vacation.

**VIDEO, AUDIO, DIGITAL, SOCIAL (IMPRESSIONS)**

Once consumers decide to make their dreams a reality, they start researching ideal travel destinations.

**CUSTOM CONTENT, DIGITAL, SOCIAL (TIME ON SITE/WITH CONTENT)**

After consumers have decided the details of their travel itinerary, they are ready to make reservations.

**OTA PROGRAMS, SEARCH, DIGITAL, SOCIAL (BOOKINGS)**

Once guests have arrived, deliver exceptional service to encourage them to return to your hotel.

**EMAIL, BLOGS, ORGANIC SOCIAL (LOYALTY)**

BRAND POSITIONING

**Napa Valley = Taste of the Good Life**

OFFERING

**Renowned wine, food  
& hospitality experience**

*“World class; no better place in  
the world to enjoy wine, food and scenery.”*



SETTING

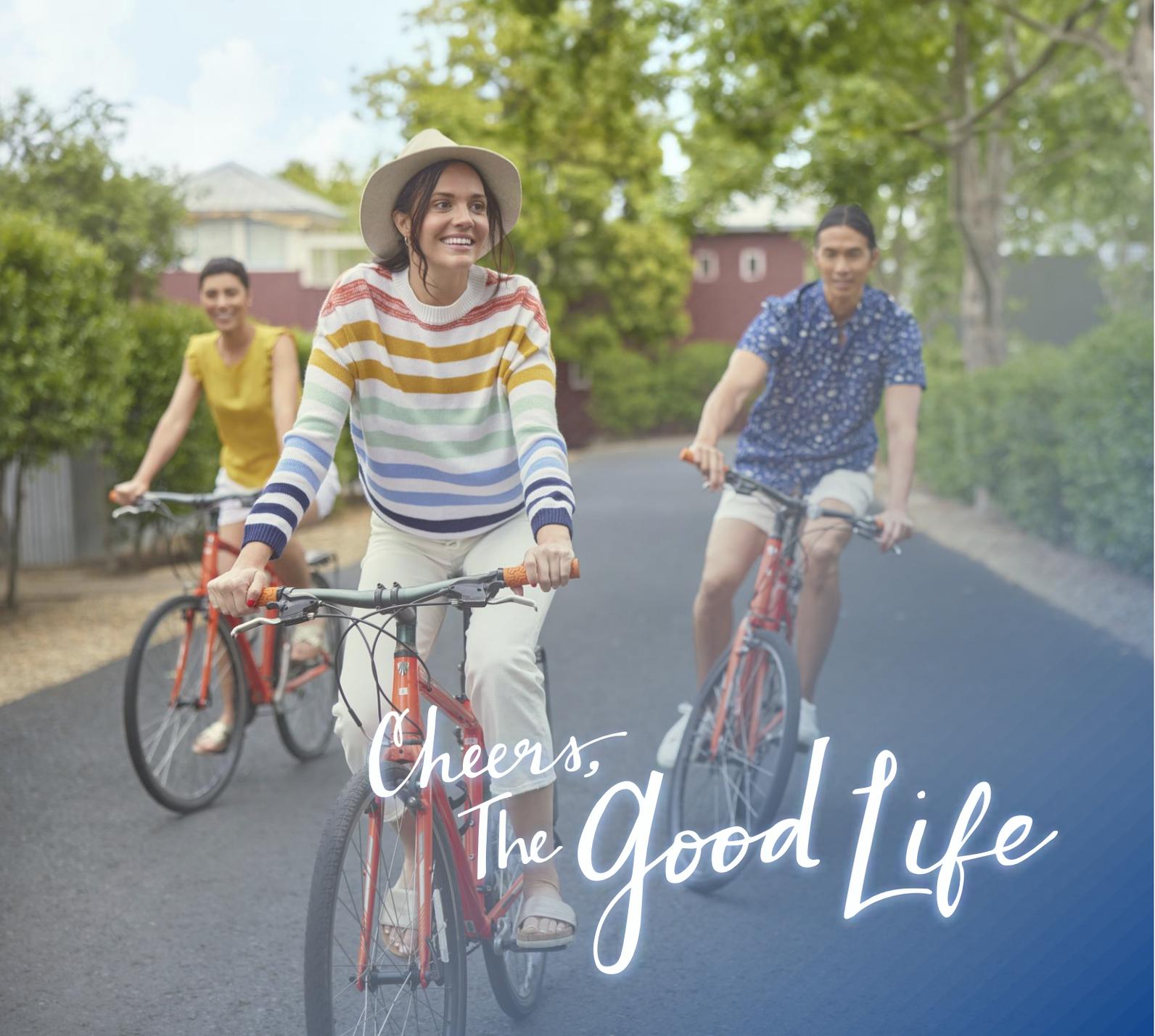
**Highly desirable lifestyle**

*“A relaxed, authentic living where you can  
slow down to admire and enjoy every day.”*

**INSIGHT:** Napa Valley delivers on the new meaning of  
———→ luxury Downtime is what is decadent

**BENEFIT:** Savoring the good things in life  
*(food, wine, friends, quality time etc.)*

**Brand Character:** welcoming, creative, warm, sophisticated, alive, beautiful, relaxed, carefree



*Cheers,  
The Good Life*



# Brand Campaign

---

**Shared**

**Savored**

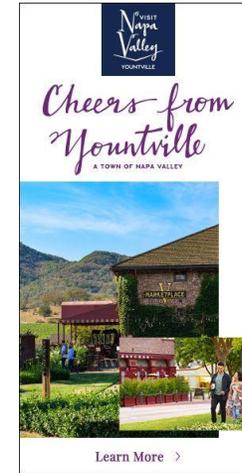
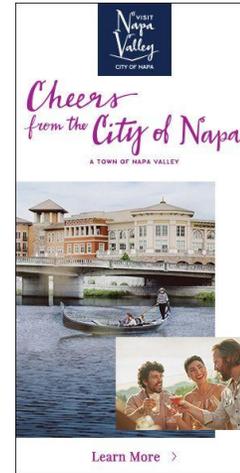
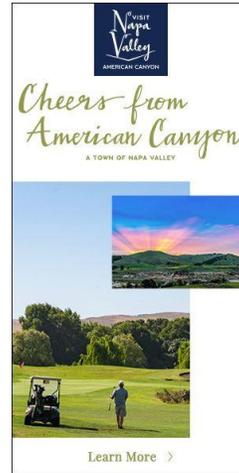
**Discovered**

# FY25 CAMPAIGN OVERVIEW

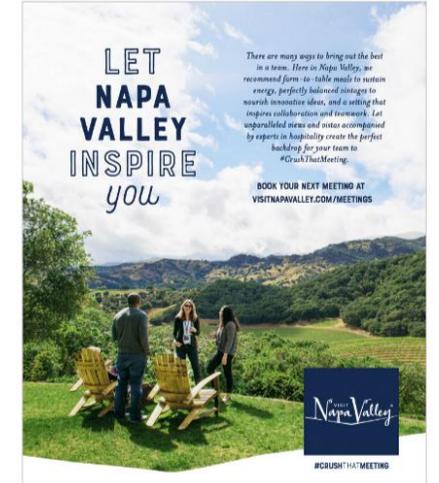
## BRAND



## TOWNS



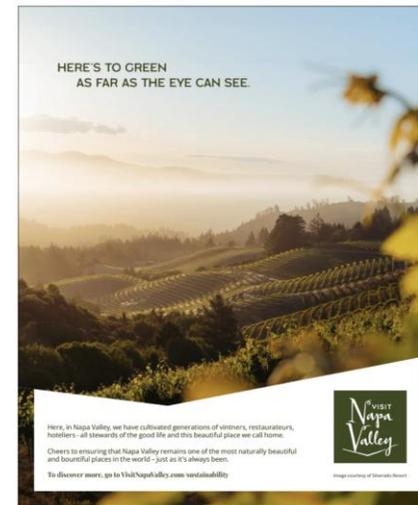
## GROUP



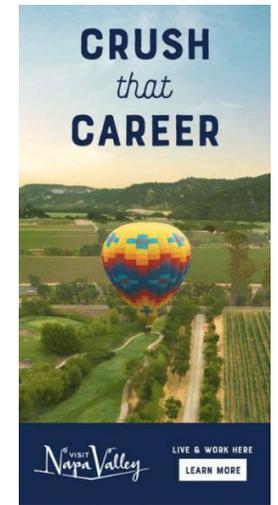
## LUXURY



## SUSTAINABILITY



## WORKFORCE



# FY25 PERFORMANCE RECAP



SPEND

**\$1.6M**



IMPRESSIONS

**115M**



VIEWS

**15.3M**



SESSIONS

**574K**

## CAMPAIGN LAYERS:

Cheers, Towns, Local,  
Workforce, Groups & Meetings

## TIMING:

August 2024 – July 2025

## TARGET MARKETS:

- Cheers: California, Texas (Primary),  
New York, Florida (Secondary)
- Towns: California
- Local: Napa Valley
- Workforce: Napa Valley, SF, Sacramento
- Group: CA, St. Louis, Chicago, Minnesota

## TARGET AUDIENCES:

- Cheers & Towns: Aspirational & Luxury
- Local: Residents
- Workforce: Job Seekers
- Group: Meeting Planners & C-Suite

# New Conversion Layer Meeting Real Time Needs



**1.67M** IMPRESSIONS  
**33,219** ATTRIBUTABLE VISITS  
SINCE APRIL 2025

**Visit Napa Valley**

*Cheers to  
a Third Night  
Free*

Learn More >>

**Visit Napa Valley**

*Enjoy  
Wine Tastings  
Under \$50  
Taste the good life*

Learn More >>

**Visit Napa Valley**

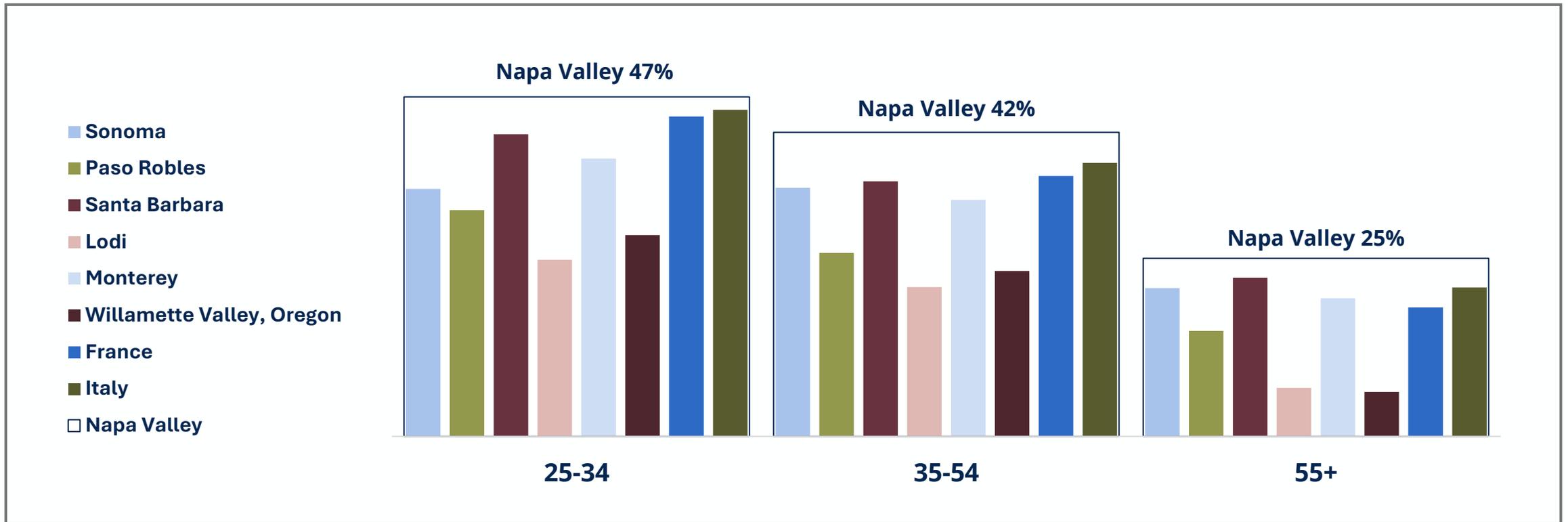
*Cheers to  
a Third Night  
Free*

Learn More >>

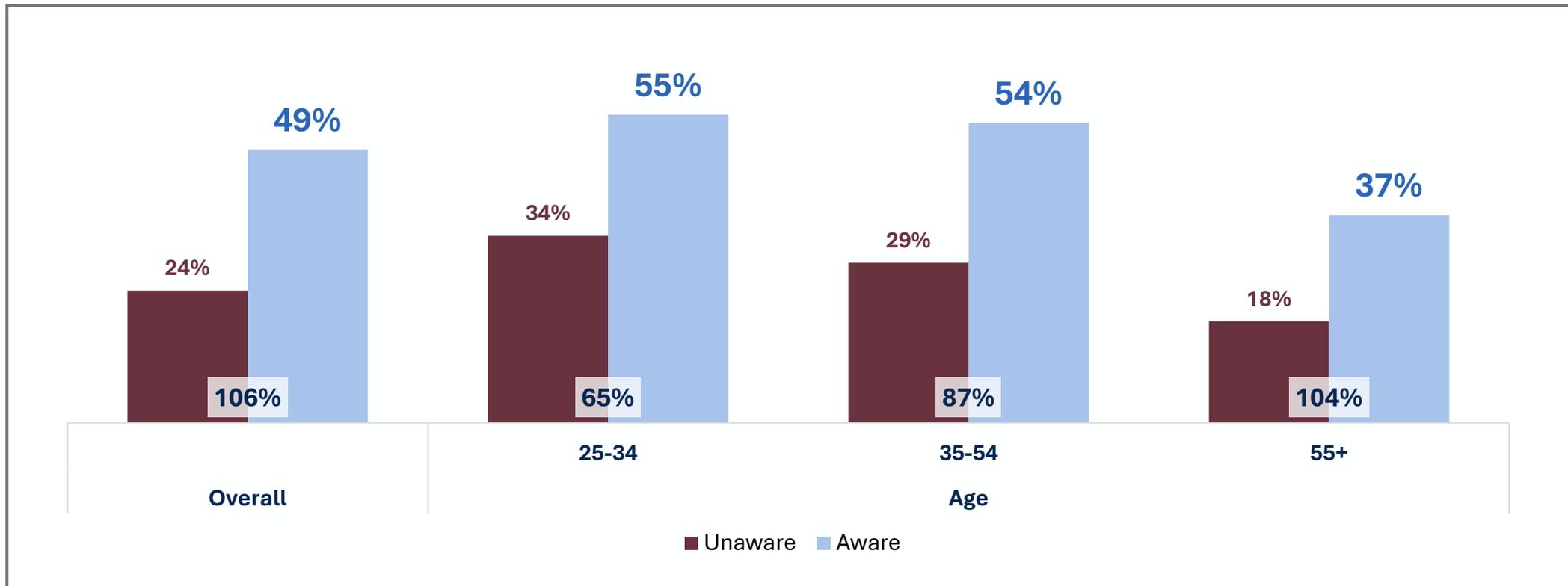
# TURNING AWARENESS INTO ACTION



# Ad Aware Consumers Are More Likely to Visit Napa Valley Over Competition



# Ad Exposure Increases Intent to Travel to Napa Valley



A low-angle, upward-looking photograph of a diverse group of people celebrating. They are holding up wine glasses and other drinks in a toast, with their faces lit up with joy and laughter. The background is a clear, bright blue sky. The image is split vertically: the left side is a dark blue gradient with white text, and the right side is the photograph of the group.

**80%**

**MOTIVATED BY  
WINE EXPERIENCES**

# Ad Aware Visitors Are Pairing Wine with So Much More



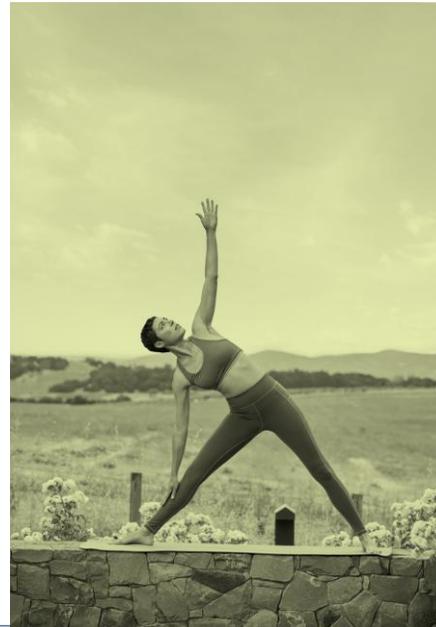
**65%**  
CULINARY



**47%**  
SHOPPING



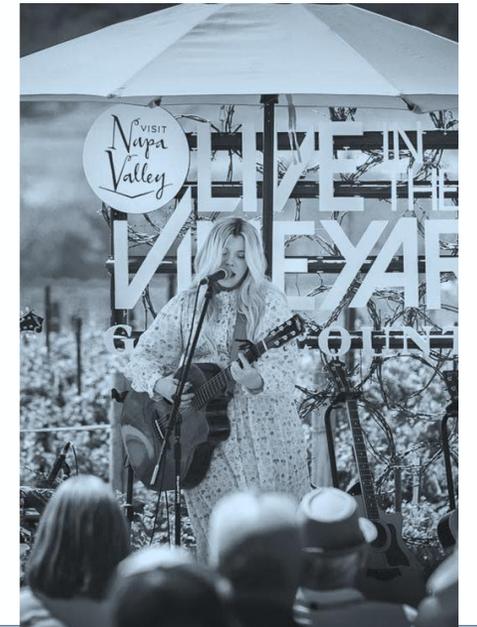
**24%**  
WELLNESS



**16%**  
ART & CULTURE



**15%**  
EVENTS



# The Proven Power of FY25 Brand Media



**458K**

**INCREMENTAL  
TRIPS**



**\$620:1**

**RETURN ON  
INVESTMENT**

# THE GOOD LIFE'S NEXT CHAPTER





## BRAND EVOLUTION OBJECTIVES



**Add depth  
& dimension**  
to Napa Valley's  
brand



Inform  
**refined  
strategic  
messaging**



Develop new  
**profiles for  
prospective  
consumers**



**Creative that  
resonates** with  
audiences of  
today & tomorrow

# Napa Valley Sets the Standard

*It's a world-class destination  
with everything – great wine,  
great food, it's beautiful in  
all seasons, and the people  
are welcoming.*





# Napa Valley's Luxury Inspires Everyone

*Napa Valley is  
a splurge-worthy  
experience.*

# The Valley in Its Entirety is the Magnet

*We like to mix it up  
and do at least one or two  
new things each trip.*

*...with 65% of repeat visitors  
exploring new towns on each trip*



A photograph of a man and a woman sitting at a table in a restaurant, both holding wine glasses and looking towards the right. The man is on the left, wearing a light-colored jacket and glasses. The woman is on the right, wearing a dark top and a pearl earring. The background is softly blurred, showing other diners and warm lighting. A semi-transparent purple overlay covers the right side of the image, containing white text.

# "A Taste of the Good Life" Encapsulates the Napa Valley Experience

*You can sip on  
top-notch wine while  
enjoying the good life!*

*...in fact, the Napa Valley brand  
is like a great host*

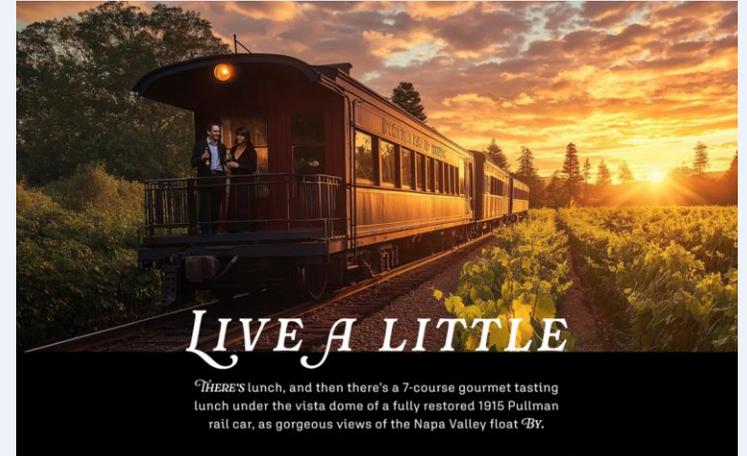


VISIT  
*Napa Valley*

**INVITES YOU TO**

*LIVE A LITTLE*  
*OR A LOT*

PRINT EXAMPLES - NOT FINAL





# *FY26 DMO Initiatives*

PART 6

VISIT  
*Napa Valley*



~\$1.4B

**TOTAL ESTIMATED ECONOMIC IMPACT**  
across nine Bay Area counties

~500K  
VISITORS

~13K  
FULL-TIME  
EQUIVALENT  
JOBS

~400K  
ROOM  
NIGHTS



This partnership will help ensure that visitors to the Bay Area during these high-traffic, premier sports events experience Napa Valley wineries, hotels and businesses, and enjoy the full depth of Wine Country's hospitality and charm.

“ This collaboration presents a remarkable opportunity for Napa Valley to showcase its world-renowned wine and hospitality by welcoming visitors during these high-profile events. The Bay Area Host Committee is doing great work bringing prestigious sporting events to the region, and we are proud to help ensure that guests from near and far get a true taste of what Napa Valley has to offer in wine and hospitality while visiting the Bay Area. ”

Linsey Gallagher, President & CEO of Visit Napa Valley

For more details about the partnership, check out the full BAHC press release here:  
<https://bayareahostcommittee.com/newsroom/bay-area-host-committee-partners-with-visit-napa-valley-and-napa-valley-vintners>



# Jessica Wong

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**Vice President**  
Partnerships & Client Services  
Bay Area Host Committee





**BAY AREA  
HOST  
COMMITTEE**

2025

CONFIDENTIAL



# OUR MISSION

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**UNITING**

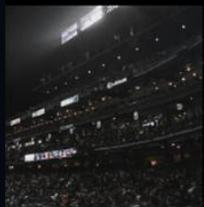
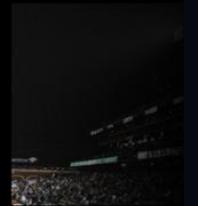


**THE BAY**

**ITING**



**THE BAY AREA**



**THROUGH SPORT**



**UN**

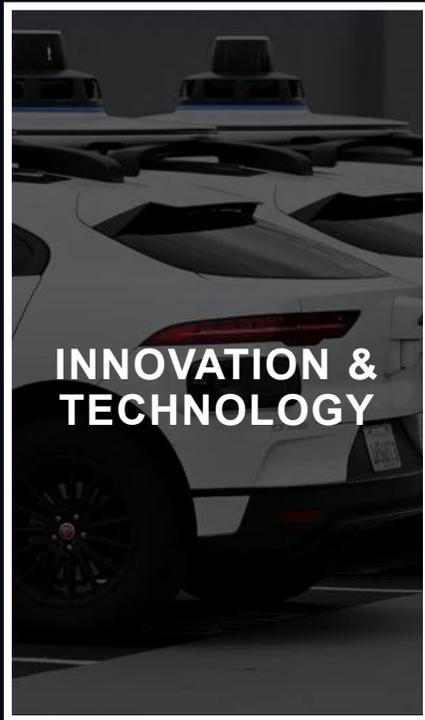
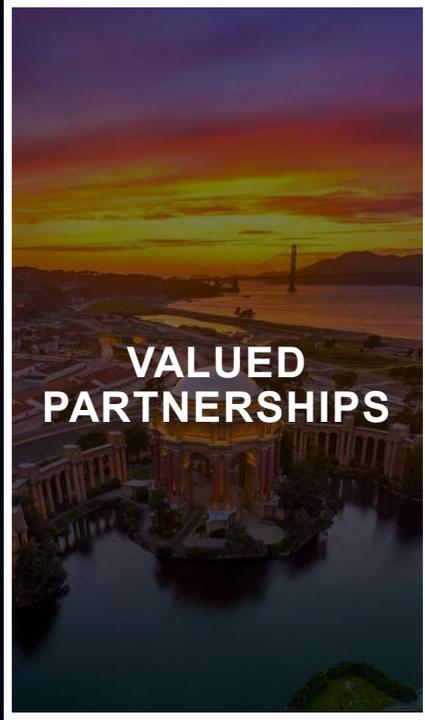
.....  
BUILDING  
PRIDE

.....  
CONNECTING  
COMMUNITIES

.....  
REENERGING  
THE REGION

# WHAT WE STAND FOR

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# THE TEAM

Bay Area Host Committee is a **COLLECTIVE OF LEADERS** who have extensive experience from various backgrounds and industries. We have been specially selected, not only for our professional expertise, but also for our passion for sports and gathering people **TO IMPACT COMMUNITIES**

At the core, we are simply a group of good humans who genuinely want to see the San Francisco Bay Area region succeed **AND BUILD A LASTING LEGACY** for generations to come.



**ZAILEEN JANMOHAMMED**  
PRESIDENT & CEO



**KARINA HEROLD**  
COO



**PATTY HUBBARD**  
CMO



**HILARY ASH**  
CHIEF STRATEGY OFFICER



**KRISTIN MILLER**  
CFO



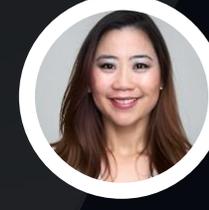
**IVETTE GONZALEZ**  
OFFICE OF CEO



**RUTH SHIKADA**  
VP, GOVERNMENT AFFAIRS



**GABBY TURNER**  
VP, MARKETING & INNOVATION



**JESSICA WONG**  
VP, PARTNERSHIPS & CLIENT SERVICES



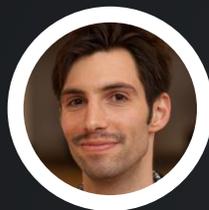
**RYAN BATES**  
DIRECTOR, PARTNERSHIPS



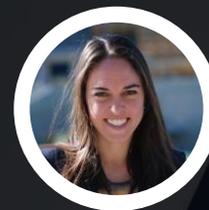
**ALLY WHITSON**  
DIRECTOR, MARKETING



**BECCA SMITH**  
DIRECTOR, EVENT OPS & CLIENT SERVICES



**ADAM LEWIS**  
DIRECTOR, COMMUNITY IMPACT



**LIZ CHANCE**  
DIRECTOR, DEVELOPMENT



**TAYLOR GILMORE**  
MANAGER, EVENT OPS & CLIENT SERVICES



**NAYA CRITTEDEN**  
MANAGER, DIGITAL CONTENT & MEDIA



**COCO SO**  
MANAGER, COMMUNITY IMPACT



**RYAN CORDERO**  
STAFF ACCOUNTANT

# WORLD-CLASS TEAMS & A-LIST LEADERS

First & only regional sports commission supported by every local professional sports team where the presidents of each team sits on our Board of Directors.



## BOARD OF DIRECTORS



Noah Wintroub  
Global Chairman  
JPMorgan Chase



Cipora Herman  
BoD, ZipRecruiter  
Opendoor



Al Guido  
President  
SF 49ers



Brandon Schneider  
President  
Golden State Warriors



Larry Baer  
President & CEO  
SF Giants



Jared Shawlee  
President  
San Jose Earthquakes



Jess Smith  
President  
Golden State Valkyries



Aly Wagner  
Founder & Chair  
Bay FC



Jonathan Becher  
President  
San Jose Sharks



Ahmed Thomas  
CEO  
Silicon Valley  
Leadership Group



BAY AREA  
HOST  
COMMITTEE

# ADVISORY BOARD

A coalition of cross-industry leaders and sports & business icons who care about the Bay Area to ensure BAHC delivers on its mission



Daniel Acosta  
Managing Director & Senior  
Partner, BCG



Fred Blackwell  
CEO, San Francisco  
Foundation



Brandi Chastain  
Co-founder, Bay FC



Scott Dadich  
CEO & Founder, Godfrey  
Dadich Partners



Mike Dunleavy  
General Manager, Golden  
State Warriors



Festus Ezeli  
Sports Analyst for NBA  
Sports Bay Area & CA



Phil Ginsburg  
GM, SF Recreation and  
Park Department



Peter Hutton  
Fmr Dir. Of Sports  
Partnerships, Meta



Hydra Mendoza  
VP, Chief of Strat. Rel. in  
Office of Chair & CEO,  
Salesforce



Zaza Pachulia  
Liaison for Business &  
Basketball, Warriors



Hunter Pence  
Analyst, MLB Network



Anna Marie Presutti  
Interim CEO, SF Travel  
Association



Bob Powers  
General Manager, Bay  
Area Rapid Transit



Cynthia Teniente-Matson  
President, San Jose State  
University



Chris Wondolowski  
Soccer Operations, San  
Jose Earthquakes



Steve Young  
Chairman & Co-Founder at  
HGGC (former 49ers)



Stacy Owen  
President & GM, NBC  
Bay Area



Megan Schoettmer  
Regional President,  
Northern CA, PNC



John Reseburg  
VP Mktg, Part. & Comm,  
EA Sports

# BRINGING WORLD CLASS SPORTING EVENTS TO THE BAY AREA



FEB 2025

[ACCOMPLISHED]



NOV 2025



FEB 2026



JUNE - JULY 2026

## ...AND MORE!



# ORGANIZATIONAL & OPERATIONAL STRUCTURE

Governing Body / Leagues  
(Event Owner)



FIFA



Local Organizing Committee  
(Local Operator)



Event  
Venue(s)



Local  
Team(s)



City  
Government(s)



Transportation  
Agencies



Community  
Organizations



Local  
Fans

# BAHC FACILITATES FULL BAY AREA INTEGRATION

Cross-section of sports, government, tourism, and economic development



10 Bay Area Counties



All Tourism Boards / Destination Marketing Organizations

# DOING WHAT MATTERS



The BAHC Foundation harnesses the untapped power and culture-shaping influence of mega-sporting events to drive access to community sports programs, create economic and workforce opportunities, and protect the Bay's natural environment.

The BAHC Foundation is the connective tissue of socio-economic impact through:



**COMMUNITY**

Increase access to sports for youth of all backgrounds and abilities across the nine-counties of the Bay Area and innovate to bring sports to more communities.

The "Community" section features a circular icon at the top with the text "SPORTS FOR ALL" and a stylized sunburst graphic. Below the icon is a photograph of a group of diverse children in athletic wear, some with their arms raised in celebration. The word "COMMUNITY" is overlaid in large white letters, and a short paragraph of text is at the bottom.

**WORKFORCE DEVELOPMENT**

Leverage the platform of mega-sporting events to build the Bay Area workforce's capacity to secure family-supporting jobs, and connect local businesses to opportunities across the Bay Area.

The "Workforce Development" section features a circular icon at the top with the text "BRIDGE TO WORK" and a stylized sunburst graphic. Below the icon is a photograph of a person leaning over a table, working with documents and a laptop. The words "WORKFORCE DEVELOPMENT" are overlaid in large white letters, and a short paragraph of text is at the bottom.

**SUSTAINABILITY**

Sustainability is built into the fabric of the Bay Area Host Committee. From the inside out, we work as advocates, organizers and conveners to drive sustainable practices throughout the Bay.

The "Sustainability" section features a photograph of a lush green tree in a garden setting. The word "SUSTAINABILITY" is overlaid in large white letters, and a short paragraph of text is at the bottom.

# DOING GOOD FOR THE BAY



**~500K**  
VISITORS EXPECTED  
FROM OUTSIDE BAY AREA



**~13K**  
FULL-TIME EQUIVALENT  
JOBS SUPPORTED ACROSS  
INDUSTRIES



**~400K**  
ROOM-NIGHTS BOOKED IN  
LOCAL ACCOMMODATIONS

# GET IN THE ACTION

**FAN ENERGY ZONE** POWERED BY **SAP**

Team	Score	Percentage	Count
Manchester United	1	43%	388
Liverpool	1	52%	4620



# 2026 BAY AREA PUBLIC SCREENING PLAYBOOK

<https://bayareahostcommittee.com/2026-bay-area-public-screening-playbook>

An aerial photograph of a vineyard at dusk. The vineyard is in the foreground, with rows of grapevines stretching across a hillside. A paved road curves through the vineyard. In the background, there are rolling hills and mountains under a dark, cloudy sky. The overall scene is serene and scenic.

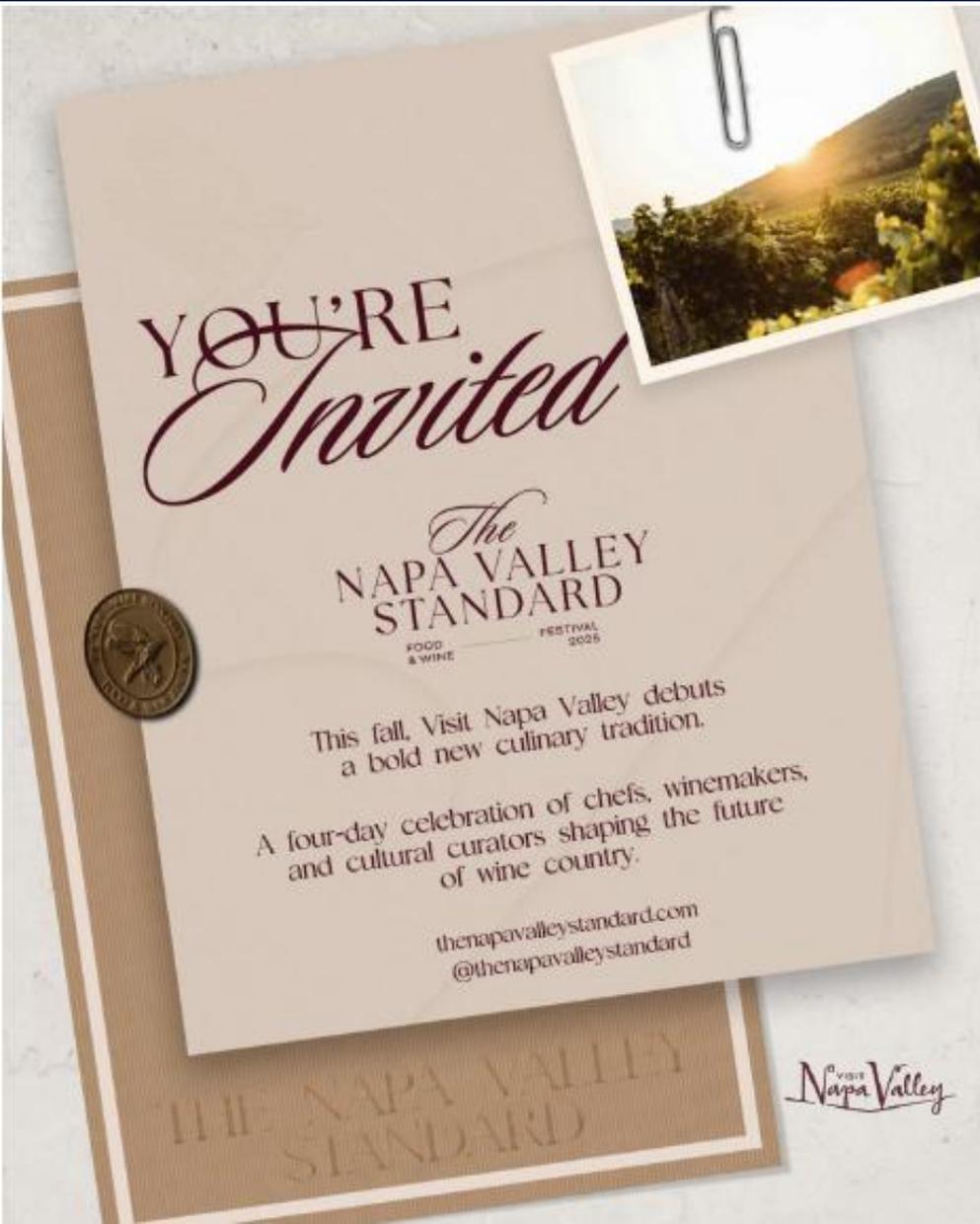
# VIP EXPERIENCES

Shaping the future of sports in the Bay Area is not just about the global sporting events; it's about impact, legacy, community, and leadership.

# JOIN US IN OUR MISSION TO UNITE THE BAY!

Follow our journey @bayareahc





## Multi-Day Wine & Food Festival

A21 is the creative team behind experiences such as the South Beach Wine & Food Festival and Pebble Beach Food & Wine Festival.

Across all their 200+ events, A21 serves 25B media impressions and sell 650K tickets annually.

**NOVEMBER 12-15, 2025, LAUNCH EVENT IN NAPA VALLEY**

*With financial support from Unincorporated Napa County TID and Visit Napa Valley*



# Abby Geha

---

**Vice President Marketing,  
Communications, Brand**  
a21



Where timeless Napa Valley  
heritage meets a bold  
new *ERA*

VISIT  
*Napa Valley*



The *Vision*

# Napa Valley's Next Marquee Culinary & Wine Festival

Designed to elevate Napa Valley's global cultural presence while  
welcoming a new generation of wine lovers

2025

*Preview*

2026

*Inaugural year*

# WHY *Now?*

**Napa Valley's heritage is unmatched, but competition among U.S. food & wine destinations is rising**

**Consumers are younger, more global, more experience-driven**

**Time for a new cultural platform that merges tradition with modern energy**





# WHY *It Matters*

**Reinforces Napa Valley as America's premier culinary + wine destination**

**Drives tourism during shoulder season**

**Strengthens local businesses + hotel partnerships**

**Builds long-term brand equity for the Valley**

# TARGET *Demographic*

**Luxury travelers & tastemakers**

**Next-gen collectors & enthusiasts: 30–50-year-old professionals engaging in wine culture**

**Cultural leaders: Chefs, winemakers, sommeliers, artists, media, influencers**

**Locals: Napa Valley community pride + participation**

The background of the entire image is a warm, golden-brown sunset sky. In the lower half, the silhouettes of a large crowd of people are visible, looking towards the horizon. The text is overlaid on this scene.

# THE STANDARD *Arrives*

2026

A full-scale destination  
festival poised to become  
one of America's great  
culinary & wine experiences.

MARQUEE TASTING EVENTS  
WINE TASTING & SEMINARS  
INTIMATE LUNCHES & DINNERS  
RENOWNED NATIONAL TALENT

Hosted in iconic locations  
throughout Napa Valley

Perfect for curated travel  
& hospitality experiences

NOVEMBER 2026  
OVERVIEW

4

Days

40+

Signature  
Events

40+

Celebrity  
& Rising  
Star Chefs

250+

Wineries

35+

Sommeliers

4,000+

Attendees

*The*  
NAPA VALLEY  
STANDARD  
FOOD & WINE ——— FESTIVAL 2025

VISIT  
*Napa Valley*

This is Napa Valley's moment  
Together, we can define the next  
generation of culinary and wine culture

## WITT SIGNIFIES A COMMITMENT TO AUTHENTIC AND TRANSFORMATIVE GUEST EXPERIENCES

WITT (Wellness in Travel & Tourism) is an independent certification program dedicated to evaluating and recognizing hotels and resorts that provide amenities and services to enhance holistic wellbeing. We assess properties based on a set of more than 100 comprehensive criteria points spanning five core pillars of wellness - considering every touchpoint of the guest experience.

From boutique hotels to global chains, properties who have achieved the WITT Certified seal are able to validate their commitment to authentic wellness experiences, enhance market differentiation, and elevate the overall quality and impact of their hospitality offerings.

[Learn more about certification](#)



**Lead the wellness movement.**

VNV is spearheading a destination-wide Wellness initiative to merge business excellence with holistic leadership practices in luxury hospitality.

Working with Carmen Cruz of “Lead by Passion” as a global wellness ambassador, VNV will capitalize on wellness trends in travel and move the Napa Valley into a leadership role in the space.



# Carmen Cruz Montes

---

**Global Wellness Ambassador**  
Visit Napa Valley



A scenic landscape of a Napa Valley vineyard at sunrise. The sun is low on the horizon, casting a warm, golden glow over the scene. In the foreground, there are rows of green grapevines. In the middle ground, there are some buildings and trees. In the background, there are rolling hills and mountains under a hazy sky.

VISIT NAPA VALLEY DESTINATION SYMPOSIUM 2025

# Wellness

September 25, 2025

Presented by Carmen Cruz Montes

# Wellness Market Overview

GLOBAL WELLNESS ECONOMY:  
**\$6.3 trillion in 2023**



Note: Numbers do not add due to overlap in sectors.  
Source: Global Wellness Institute



## Wellness Market Growth

2020	\$4.6 trillion
2022	\$5.8 trillion
2023	\$6.3 trillion ( 9% annual growth)

## Wellness Tourism

2022	\$637 Billion
2023	\$830 Billion (30% growth)
2024	\$944 Billion (14 % growth)

## Wellness Tourism Projections

2025	\$1,049 Billion
2026	\$1,150 Billion
2027	\$1,249 Billion
2028	\$1,351 Billion

# Wellness Travelers



## Individual Leisure

- Motivated by renewal, discovery, and authenticity.
- Meaningful connections and space for self-care, self-growth, outdoor leisure and personalized fitness.
- Seek experiences that pair holistic intention and indulgence in destinations that inspire.



## Group Travel

- Strive to design gatherings that feel authentic, distinct.
- They aim to balance intention and restoration.
- Pair structured sessions with place-based immersion that deepens connection/ meaning group.
- Destination= wellness ecosystem



## Wellness / Travel Industry

- Industry professionals: trusted filters between destinations and the world, defining what's real & relevant.
- Look for emerging trends in lifestyle and travel & look for coherence between brand, community, place
- Motivated to offer something meaningful, not just marketable

**A PLACE OF ABUNDANCE - 30 MILES OF WELLNESS ABUNDANCE**

No other destination can match Napa Valley's combination or concentration of natural settings, natural food, and natural connection—even in California.

# Local Audiences



## Local Businesses

### *Experience Curators*

Our local vendors, purveyors and hosts; Napa Valley businesses shape how the destination is experienced and understood.

From luxury hotels and mineral spas to sustainable restaurants and fitness studios, they deliver the care, craft, and character that defines our region.



## Residents

### *Stewards of the Good Life*

From long-time residents to transplants drawn to our natural beauty, slower pace, and vibrant community, our locals steward the lifestyle that wellness travelers come here to find.

Wellness is just a part of everyday life—experienced through connection to self, others, and their surroundings.

All need a trusted platform  
to evolve, connect,  
and grow.

A platform that elevates the  
craft of our businesses, our  
way of living, and our  
destination as a whole.



WHAT'S TO COME

## It's time for a new chapter

An opportunity to reveal another layer of what makes our Napa Valley extraordinary

A new expression of an enduring truth:

Rooted in our heritage of healing

Crafted and cultivated across generations

Unfolding an immersive and holistic way of living well...

The Napa Valley Way



# *Great Wine Capitals*

PART 7

VISIT  
*Napa Valley*

# GREAT WINE CAPITALS NETWORK



Great Wine Capitals  
GLOBAL NETWORK | A WORLD OF EXCELLENCE

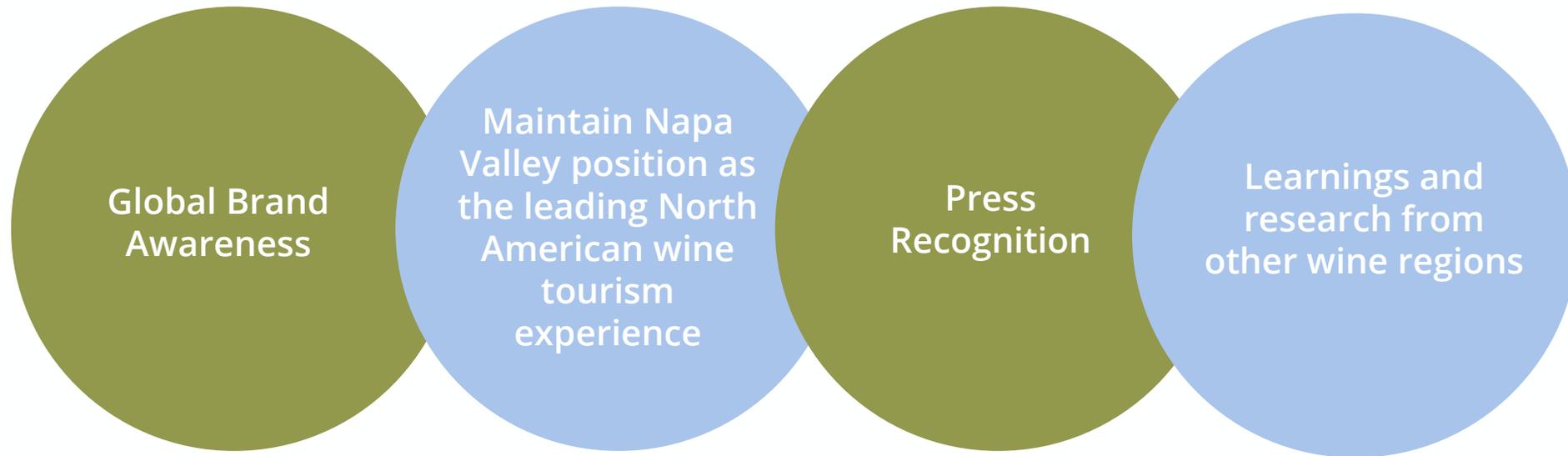


# Great Wine Capitals

**GLOBAL NETWORK**

**A WORLD OF EXCELLENCE**

A network of major global cities sharing a key economic and cultural asset - their internationally renowned wine regions. The network provides:



**Great Wine Capitals**

GLOBAL NETWORK | A WORLD OF EXCELLENCE



# Great Wine Capitals

GLOBAL NETWORK  

---

A WORLD OF EXCELLENCE

## Regional Awards

# 2026 NAPA VALLEY REGIONAL DELEGATION & JUDGING PANEL



**Amber Manfree**  
Supervisor



**Anne Cottrell**  
Supervisor



**Tracy Cleveland**  
Agriculture  
Commissioner



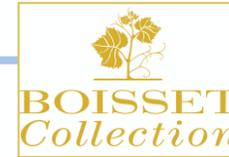
**Ryan Alsop**  
CEO



**Linsey Gallagher**  
President & CEO



**Stacey Dolan Capitani**  
Vice President of Marketing



**Patrick Egan**  
Senior VP, Marketing  
& Communications

**Delegation will  
travel to Bordeaux,  
France for the  
Annual General  
Meeting in  
November 2025**



# 2026 Best of Wine Tourism Regional Award Categories

- Accommodations
- Architecture & Landscape
- Art & Culture
- Culinary Experiences
- Innovative Wine Tourism Experiences
- Sustainable Wine Tourism
- Wine Tourism Services



# Congratulations!

2026 REGIONAL AWARD WINNERS

## Category

Accommodation

Architecture & Landscape

Art & Culture

Culinary Experience

Innovative Wine Tourism

Sustainable Wine Tourism

Wine Tourism Service

## Winner

**The George**

**Cuvaison**

**Boisset Collection**

**Clif Family Winery**

**Sterling Vineyards**

**CHANDON**

**Festival Napa Valley**

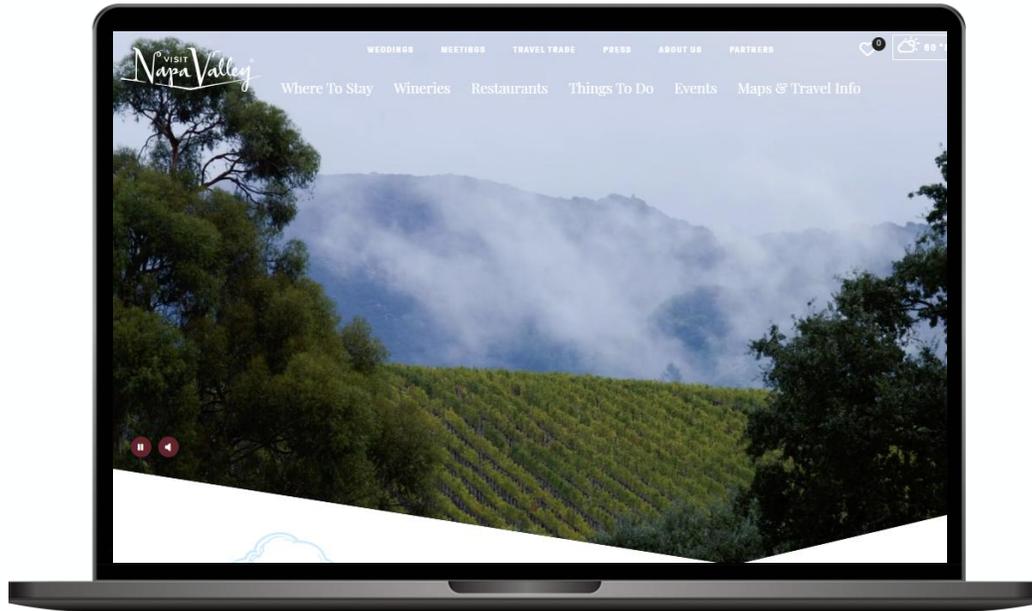




# *Closing Remarks*

PART 8

VISIT  
*Napa Valley*



## Take advantage of Resources and Tools for the Hospitality Industry!

- Check out the Industry page on [VisitNapaValley.com/industry](https://www.visitnapavalley.com/industry) for current reports and programs.
- Attend our industry forums and events to gain insights, news, information and to enjoy networking opportunities.
- Order your supply of the Napa Valley Visitor Guide Magazine and Napa Valley Maps. They are complimentary!

## CLICK HERE TO...

[Go to Visit Napa Valley.com](#)   [Access Useful Industry Resources and Data](#)   [View Visit Napa Valley's Annual Plan & Long-Range Plan](#)

[Review the Latest Visit Napa Valley Marketing Campaigns](#)   [Access Travel Research & Statistics](#)   [Sign Up for Our E-Newsletter](#)

# CONNECT WITH VISIT NAPA VALLEY



DEPARTMENT	REACH OUT TO...	CONTACT
<b>Partnership</b>	<ul style="list-style-type: none"> <li>• Understand your partner benefits</li> <li>• Access the partner portal</li> <li>• Schedule a partner visit or partner hour with our team</li> </ul>	<a href="mailto:Partnership@VisitNapaValley.com">Partnership@VisitNapaValley.com</a>
<b>Marketing</b>	<ul style="list-style-type: none"> <li>• Share news or new programs, events</li> <li>• Learn about integrating into organic content on our website, blog, newsletter, or social channels</li> <li>• Learn more about our media campaigns</li> </ul>	<a href="mailto:Marketing@VisitNapaValley.com">Marketing@VisitNapaValley.com</a>
<b>Media</b>	<ul style="list-style-type: none"> <li>• Connect with Visit Napa Valley on media leads</li> </ul>	<a href="mailto:Media@VisitNapaValley.com">Media@VisitNapaValley.com</a>
<b>Sales &amp; Business Development</b>	<ul style="list-style-type: none"> <li>• Let us know about your great space to host groups</li> <li>• Share experiences that appeal to the leisure traveler</li> <li>• Hear about trade show opportunities</li> </ul>	<a href="mailto:Sales@VisitNapaValley.com">Sales@VisitNapaValley.com</a>
<b>Community &amp; Industry Relations</b>	<ul style="list-style-type: none"> <li>• Collaborate with Visit Napa Valley</li> <li>• Align with Visit Napa Valley's community priorities</li> <li>• Learn about Visit Napa Valley's Destination Stewardship leadership</li> </ul>	<a href="mailto:CommunityRelations@VisitNapaValley.com">CommunityRelations@VisitNapaValley.com</a>
<b>Data &amp; Research</b>	<ul style="list-style-type: none"> <li>• Get updated on current lodging data</li> <li>• Receive the latest market insights</li> <li>• Get answers to specific questions about visitation to the Napa Valley</li> </ul>	<a href="mailto:Research@VisitNapaValley.com">Research@VisitNapaValley.com</a>
<b>Guest Experience</b>	<ul style="list-style-type: none"> <li>• Let us know about available last-minute, day-of reservations</li> <li>• Participate in a "Partner Pop Up" in the Napa Valley Welcome Center</li> </ul>	<a href="mailto:Concierge@VisitNapaValley.com">Concierge@VisitNapaValley.com</a>
<b>Industry Tools</b>	<ul style="list-style-type: none"> <li>• Access to our latest reports</li> <li>• Download helpful resources and tools</li> </ul>	<a href="http://www.VisitNapaValley.com/Industry">www.VisitNapaValley.com/Industry</a>

A blue umbrella is shown from a low angle, partially open, against a backdrop of a cloudy, overcast sky. The umbrella's ribs and fabric are clearly visible. The overall mood is calm and protective.

*Headwinds ahead?  
No worries —  
Visit Napa Valley  
has you covered in  
more ways than one.*

VISIT  
*Napa Valley*