



CALISTOGA • ST. HELENA • YOUNTVILLE • CITY OF NAPA • AMERICAN CANYON

How Tourism Benefits Napa Valley

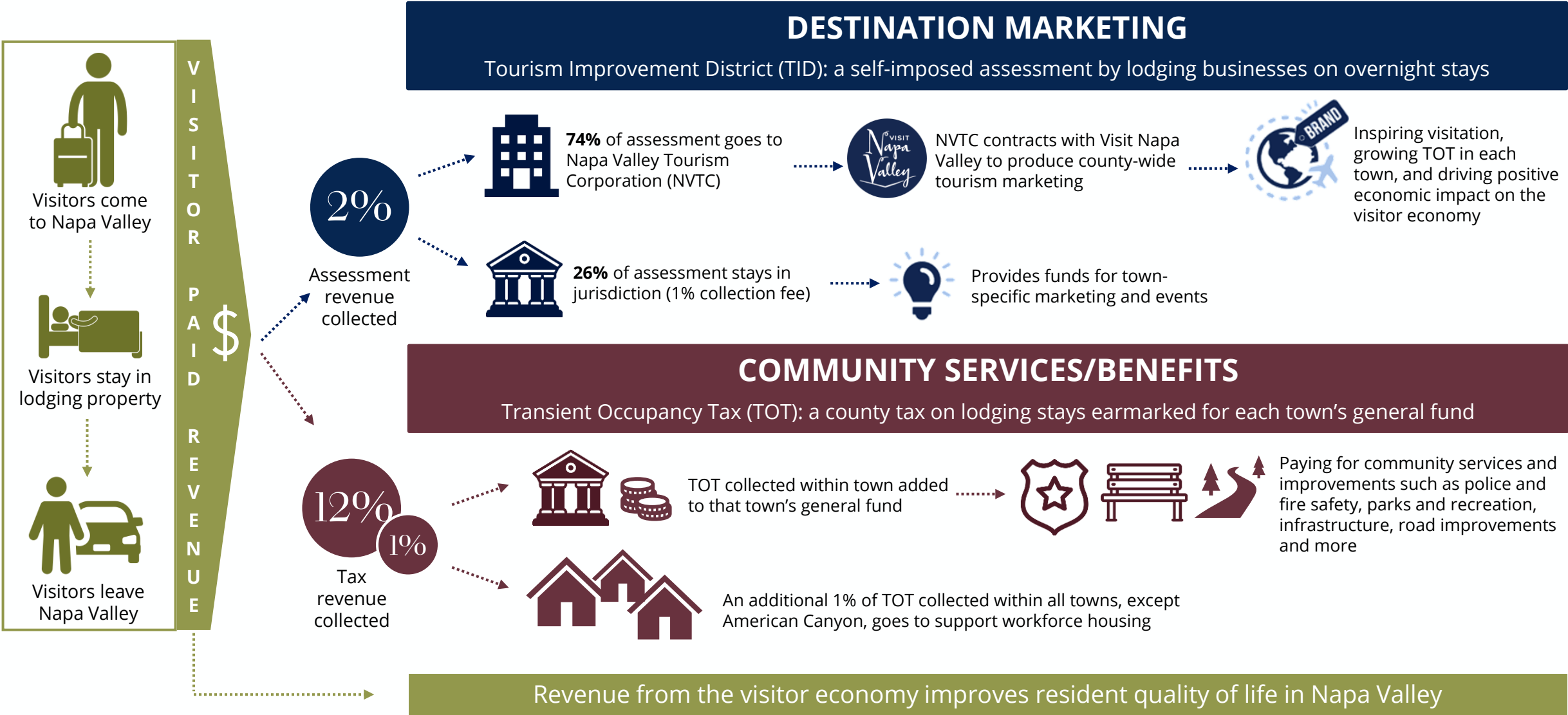
July 2026
Data through FY25



HOW TOURISM FUNDS THE COMMUNITY & SUPPORTS MARKETING



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



DESTINATION MARKETING ECOSYSTEM

Visit Napa Valley Role

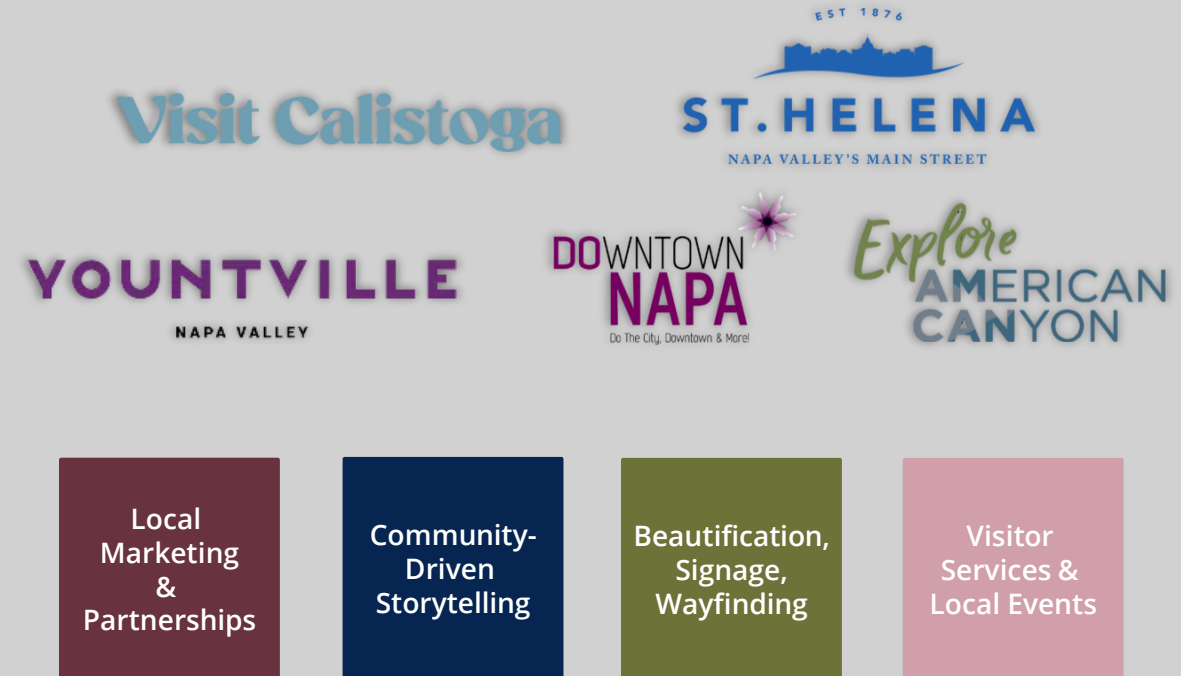
75% of TID funds
Valley-wide Demand Generation



2%
TID*

Town Partner Role

25% of TID funds
Town-level Promotion



*Tourism Improvement District (TID): a self-imposed assessment by lodging businesses on overnight stays to fund destination marketing programs

MANAGEMENT DISTRICT PLAN – GOVERNANCE

TOURISM IMPROVEMENT DISTRICT (TID) FUNDING ALLOCATION, JUNE 2025-JUNE 2035



VISIT NAPA VALLEY VALLEY-WIDE MARKETING & SALES
75% of assessment goes to Napa Valley Tourism Corporation

2%
TID

LOCAL JURISDICTION DESTINATION MARKETING
25% of assessment remains within that local jurisdiction

Funding from the assessment will be applied to marketing and sales programs that **promote tourism in the valley and will encourage overnight stays in Napa Valley.** Valley-wide marketing and sales programs are designed to promote, encourage, and support tourism and hospitality in Napa Valley and may include, but are not limited to:

- **Paid Media** (Advertising) such as Online/digital advertising, Print advertising, Out-of-home advertising (billboards, roadside signage, kiosks, banners), Radio advertising, Events sponsorship and activations, Production costs for advertising assets
- **Owned Media** (Channels/Platforms) such as: Napa Valley website, Napa Valley social media channels, Napa Valley newsletters, blogs, content, Marketing materials (brochures, pamphlets, branded collateral), Industry tradeshow, conferences, and activations, Distribution and fulfillment of marketing and sales materials, Operation of Valley-Wide visitor information center (located at Napa Valley Welcome Center in Downtown Napa)
- **Earned Media** (Public Relations & Press) such as: Public relations outreach (including press bulletins/releases and media leads, crisis communications, etc.), Press educational and familiarization trips
- **Sales** (Group and Travel Trade) Programs such as: Lead Generation, Trade Shows, Sales Missions, Familiarization Tours
- **Special Projects** and Programming for Destination Stewardship programs and initiatives including, but not limited to: Sustainability, Hospitality Workforce Development, Heritage Tourism, DEI&A

Jurisdiction-specific destination marketing funding is designed to support initiatives which **promote and enhance local, jurisdiction-based tourism and hospitality and is aligned with valley-wide promotional effort.** Local jurisdiction destination marketing funding is designed to support to local activities which promote and enhance locally based tourism efforts, including but not limited to:

- Locally specific market niche advertising and marketing efforts that complement, and do not conflict with or compete with, the valley-wide promotion effort.
- Tourism marketing and promotional information.
- Local special event programming, underwriting and promotion.
- Operation of local visitor information center.
- Community and cultural arts programming activities.
- Tourism related streetscape enhancement and maintenance or visitor-serving improvements.
- Seasonal and other tourism and visitor related programs.
- Local tourism shuttle or other visitor transportation programs.
- Seed funding for community-based programs which support or enhance tourism.
- Trails, pedestrian paths, signage, bike paths, etc. which enhance and improve upon the visitor experience and access to lodging properties.
- Enhanced maintenance and custodial municipal services to tourism-related areas.

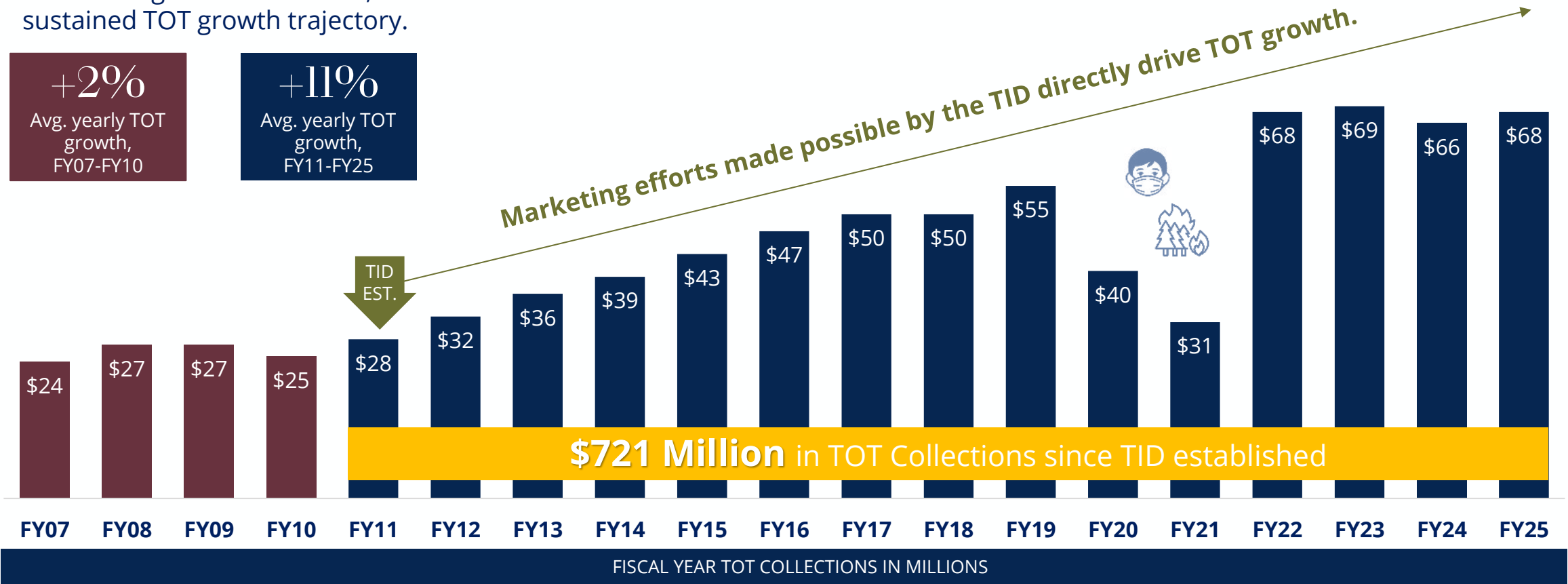
TRANSIENT OCCUPANCY TAX (TOT) GROWTH



Implementation of the Tourism Improvement District (TID) in FY11 begins a measurable, sustained TOT growth trajectory.

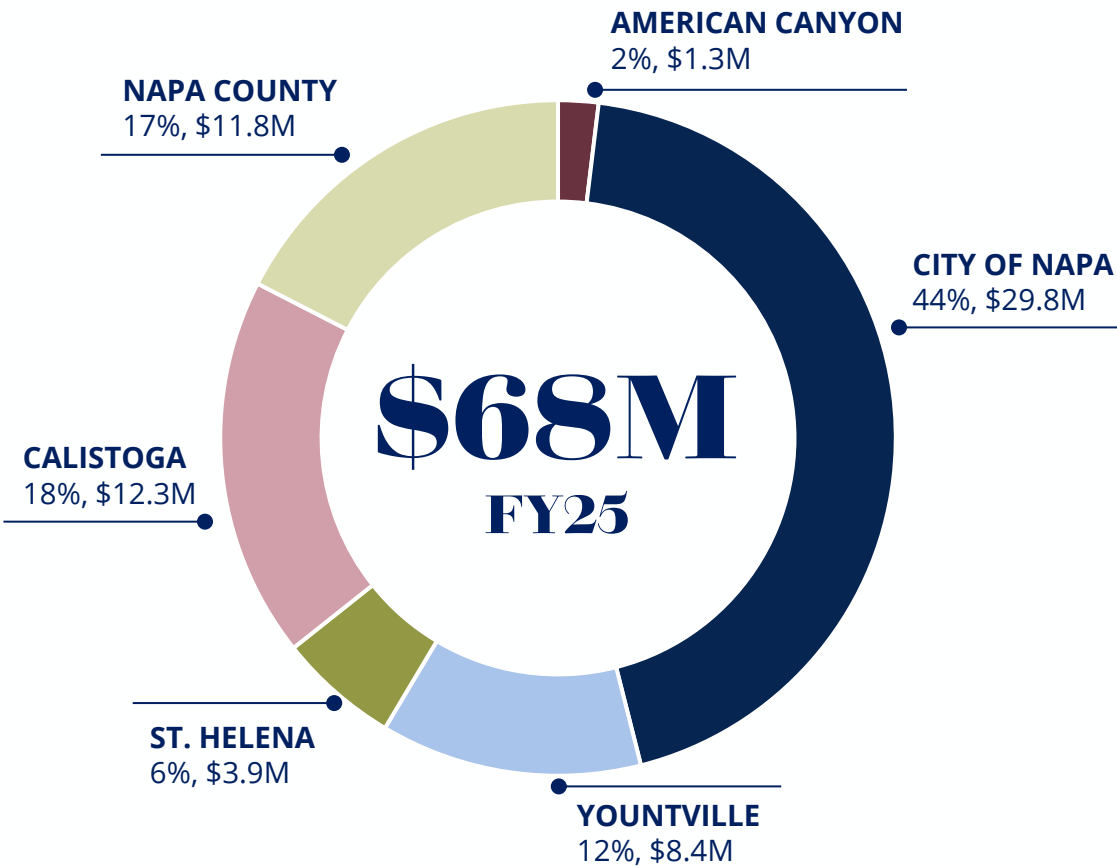
+2%
Avg. yearly TOT growth, FY07-FY10

+11%
Avg. yearly TOT growth, FY11-FY25



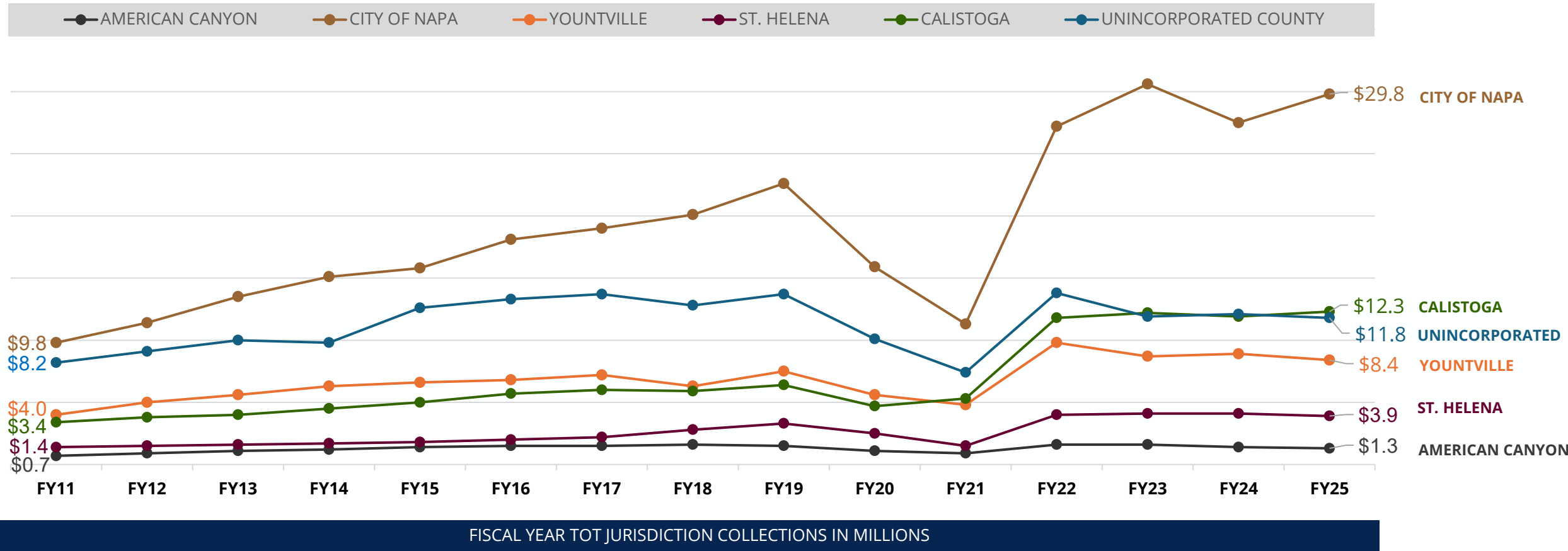
Transient Occupancy Tax (TOT) revenue from lodging guests goes directly to each town/jurisdiction general fund.

FY25 TOT COLLECTED BY JURISDICTION



Transient Occupancy Tax (TOT) revenue from lodging guests goes directly to each town/jurisdiction general fund.

TOT GROWTH BY JURISDICTION, THRU FY25



Transient Occupancy Tax (TOT) revenue from lodging guests goes directly to each town/jurisdiction general fund.

FY25 TOT DETAILS BY JURISDICTION



	Population (rounded to hundreds, per US Census Bureau 2023)	# Rooms (per STR, June 2025)	Total TOT Collected by Jurisdiction	TOT as % of General Fund (based on FY25 Budget)	TOT Growth vs 2011	1% Workforce Housing Initiative
AMERICAN CANYON	21,300	313	\$1,301,442	7%	80%	--
CITY OF NAPA	77,500	2,871	\$29,785,798	21%	202%	\$2,482,150
YOUNTVILLE	3,400	446	\$8,447,040	59%	111%	\$703,920
ST. HELENA	5,300	292	\$3,888,766	21%	179%	\$400,409
CALISTOGA	5,100	903	\$12,310,000	54%	259%	\$1,025,833
UNINCORPORATED	21,000	752	\$11,777,050	6%	144%	\$981,421
Total Napa County	133,200	5,577	\$67,510,096		148%	\$5,593,733

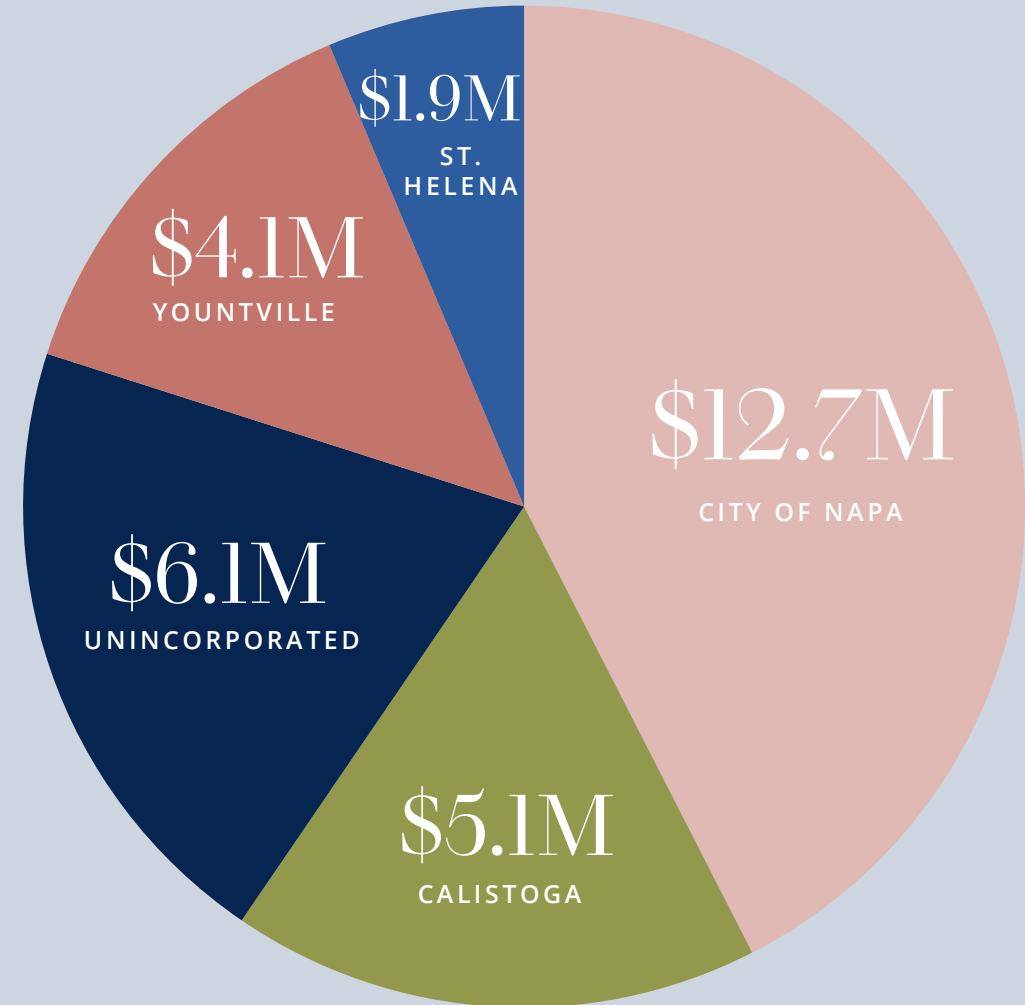
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WORKFORCE HOUSING FUNDS BY JURISDICTION



**TOTAL WORKFORCE HOUSING FUNDS
COLLECTED SINCE 2019**

**\$30
MILLION**



1% of Transient Occupancy Tax (TOT) Revenue from Lodging Guests funds workforce housing initiatives in all jurisdictions except American Canyon

NAPA VALLEY TOURISM IMPROVEMENT DISTRICT (TID)



NAPA VALLEY TOURISM DISTRICT TIMELINE

2010

District formed
for 5-year term

2015

District renewed
for 10-year term

2025

10-year renewal:
June 16, 2025- June 15, 2035

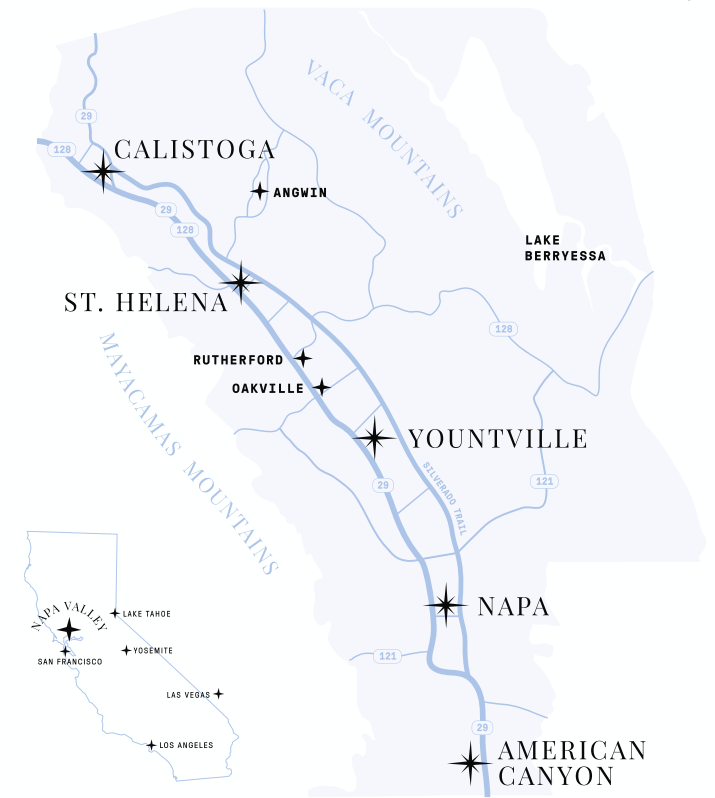
“

Renewing the TID was essential to securing the resources we're going to need to attract visitors to our destination in the future, especially now, as we face increasing competition in the destination landscape and challenges to the wine industry overall

”

Linsey Gallagher, President and CEO of Visit Napa Valley

Five Distinct Towns,

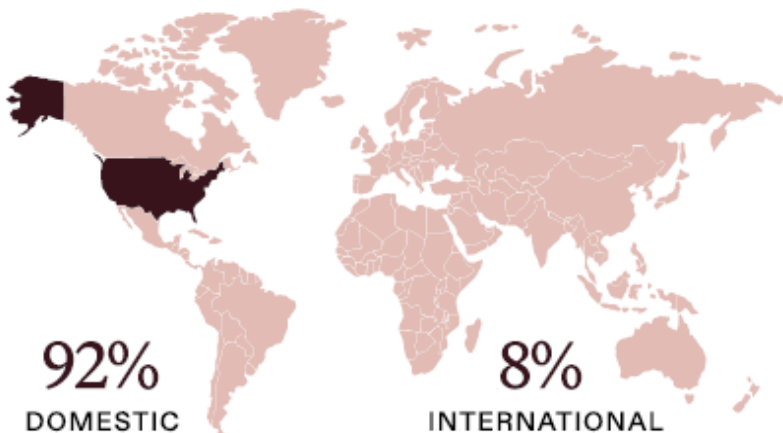


One Amazing Valley

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.

NAPA VALLEY TOURISM ECONOMY ECONOMIC IMPACT

Napa Valley welcomed **3.8M** TOTAL VISITORS



38%
OVERNIGHT
GUESTS



62%
DAY TRIP
VISITORS

Visitors to
Napa Valley spent

\$2.2B SUPPORTING
LOCAL
BUSINESSES



\$718M
LODGING



\$647M
RETAIL &
WINERIES



\$505M
FOOD &
BEVERAGE



90% of spending comes from overnight
visitors, who are 38% of volume



\$6M VISITOR SPEND ON
AN AVERAGE DAY

\$162.5M in local tax revenue
for community services



PARKS &
RECREATION



PUBLIC
SAFETY



ROAD
IMPROVEMENTS



\$5,900 in tax savings annually
per household



1/7 jobs in Napa county is supported
by the visitor economy



>15,000 total jobs, including indirect
and induced effects



Visit Napa Valley is the official destination marketing and management organization for Napa County. The organization promotes the region as an attractive travel destination and works to continually 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.

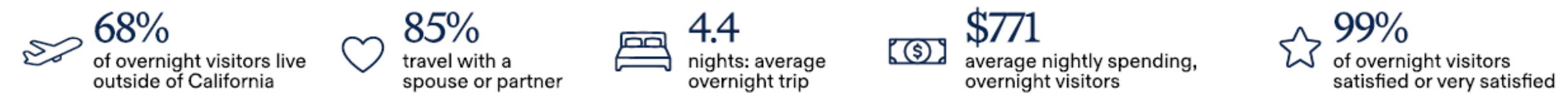
MISSION

Promote, protect, and enhance the Napa Valley destination.

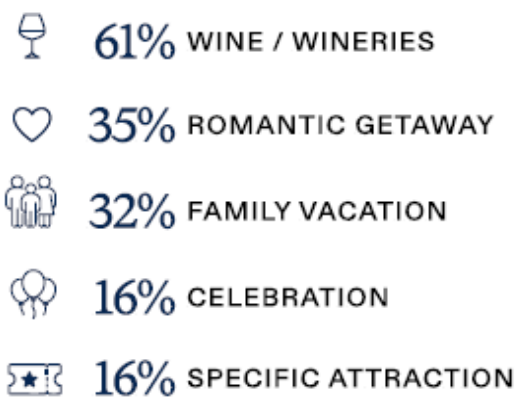
Demographics



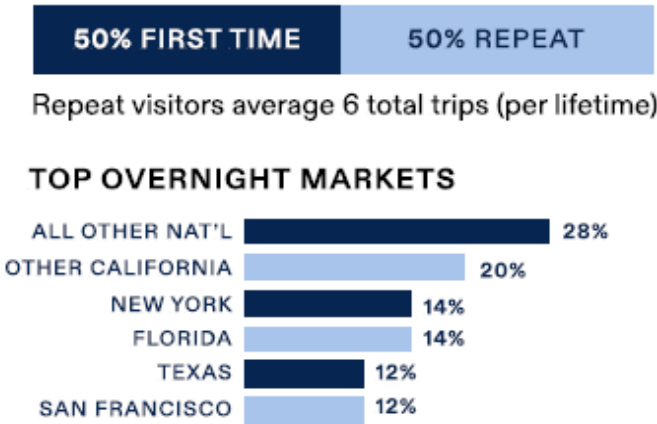
Trip profile



Trip motivators



Who visits, and from where



How visitors move throughout Napa Valley

	AM. CANYON	NAPA	YOUNTVILLE	ST. HELENA	CALISTOGA
AMERICAN CANYON	STAYED	75%	29%	34%	31%
NAPA	17%	STAYED	23%	26%	21%
YOUNTVILLE	21%	71%	STAYED	54%	43%
ST. HELENA	20%	68%	45%	STAYED	39%
CALISTOGA	22%	68%	44%	48%	STAYED

Read across by row

Thank You

^oVISIT
Napa Valley