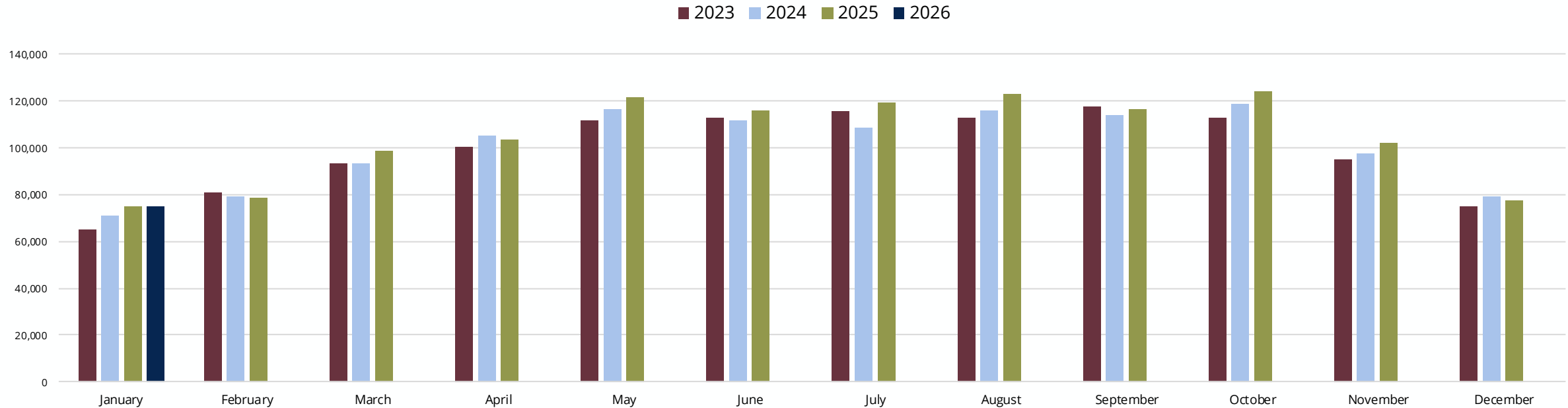


# LODGING TREND



## Napa County Lodging Demand, by Month



January 2026	Occupancy	ADR	RevPAR	Revenue	Supply	Demand
2026	45.4%	\$302.26	\$137.19	\$22,621,119	164,889	74,841
2025	46.2%	\$312.56	\$144.41	\$23,677,414	163,959	75,752
YOY % change/2025	-1.8%	-3.3%	-5.0%	-4.5%	0.6%	-1.2%

Demand is the number of rooms sold, while Occupancy is the percentage of AVAILABLE rooms sold (Rooms Sold/Rooms Available)

# LODGING: JANUARY 2026



January 2026	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
<b>COMPETITIVE SET</b>						
<b>Napa County</b>	<b>45.4%</b>	<b>-1.8%</b>	<b>\$302.26</b>	<b>-3.3%</b>	<b>\$137.19</b>	<b>-5.0%</b>
Sonoma County	48.3%	+6.5%	\$161.65	-2.3%	\$78.12	+4.0%
Monterey County	54.9%	-2.5%	\$199.83	-5.2%	\$109.65	-7.5%
San Luis Obispo County	52.6%	-2.4%	\$148.13	-0.5%	\$77.90	-2.9%
Santa Barbara County	56.4%	-3.8%	\$206.76	-2.2%	\$116.54	-5.9%
San Francisco County	60.9%	+6.2%	\$400.57	+3.9%	\$243.82	+10.4%
<b>JURISDICTIONS</b>						
American Canyon	57.7%	+7.1%	\$103.04	-10.9%	\$59.43	-4.6%
Napa (City of)	46.9%	-5.8%	\$242.20	-5.7%	\$113.66	-11.2%
Yountville	33.5%	+7.0%	\$535.23	-9.1%	\$179.51	-2.7%
St. Helena	52.8%	+6.0%	\$397.13	-6.1%	\$209.74	-0.5%
Calistoga	44.8%	-8.2%	\$463.56	+4.3%	\$207.78	-4.3%
Unincorporated Co.	38.2%	+13.9%	\$438.36	-3.6%	\$167.48	+9.8%
<b>SERVICE TYPE</b>						
Luxury Hotels	38.5%	1.4%	\$715.83	-5.0%	\$275.69	-3.7%
Group Hotels	46.4%	-1.1%	\$222.37	-4.6%	\$103.23	-5.6%
Limited-Service Hotels	50.7%	-6.3%	\$137.42	-8.0%	\$69.65	-13.8%

Occupancy was soft. Though YOY decrease was more modest vs. central coast wine regions, Napa Valley paced behind the comp set with a 45% occupancy.

Sonoma both grew and outpaced Napa.