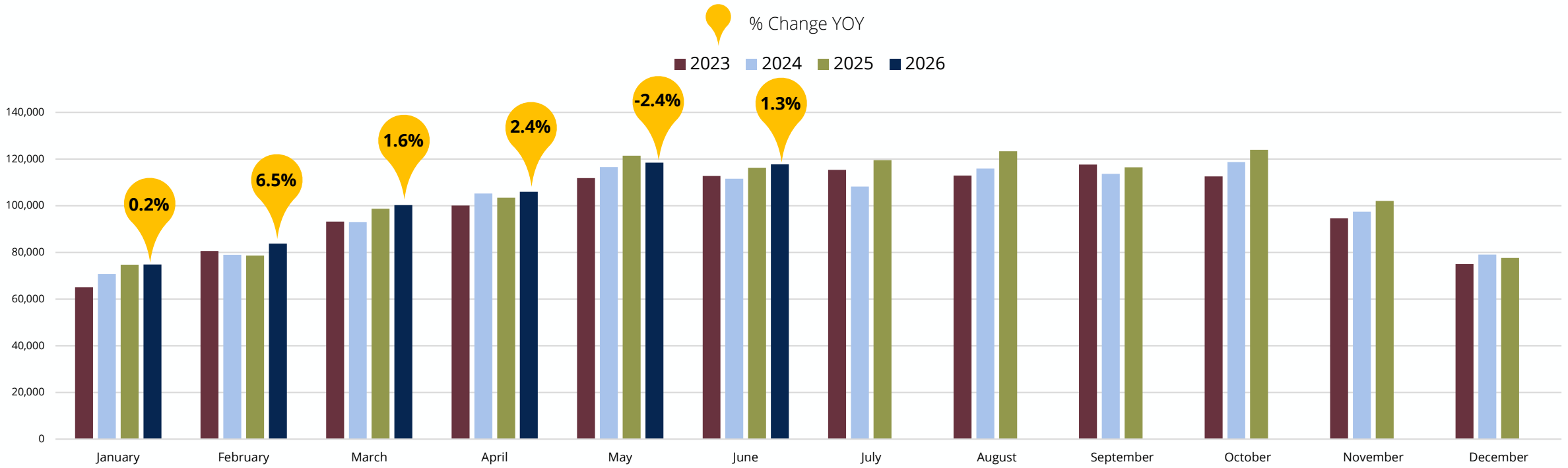
NAPA VALLEY LODGING DEMAND BY MONTH



Jan-Jun 2026 YTD	Occupancy	ADR	RevPAR	Revenue	Supply	Demand
2026	62.4%	$418.73	$261.40	$251,159,148	960,821	599,807
2025	61.9%	$406.01	$251.45	$238,696,099	949,286	587,908
YOY % change/2025	+0.8%	+3.1%	+4.0%	+5.2%	+1.2%	+2.0%

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

STR Source: Smith Travel Research, 2023 - June 2026

LODGING: MONTH OF JUNE 2026

COMPETITIVE REGIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
Napa County	**73.0%**	**2.6%**	**$457.93**	**1.0%**	**$334.20**	**3.7%**
Sonoma County	73.6%	9.9%	$241.57	4.0%	$177.87	14.3%
Monterey County	79.5%	5.9%	$260.23	-5.2%	$206.85	0.4%
San Luis Obispo County	74.5%	3.3%	$224.54	3.3%	$167.39	6.7%
Santa Barbara County	78.9%	8.9%	$288.50	5.5%	$227.72	15.0%
San Francisco County	79.3%	8.4%	$287.12	24.8%	$227.55	35.3%

JURISDICTIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
American Canyon	76.7%	-3.5%	$179.54	0.0%	$137.69	-3.5%
Napa (City of)	73.7%	1.4%	$378.15	0.2%	$278.63	1.6%
Yountville	72.6%	17.9%	$749.98	1.8%	$544.68	20.1%
St. Helena	72.8%	0.6%	$659.20	3.3%	$479.80	3.9%
Calistoga	70.8%	0.4%	$602.52	-0.6%	$426.33	-0.2%
Unincorporated Co.	71.2%	5.1%	$658.59	5.3%	$469.18	10.7%

SERVICE TYPE	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
VNV Luxury	72.5%	10.1%	$1049.77	0.2%	$760.91	10.3%
VNV Limited-Service	76.0%	-1.4%	$225.32	-1.5%	$171.22	-2.8%
VNV Group	74.5%	2.3%	$350.49	1.4%	$261.13	3.7%

Takeaways:

All regions saw occupancy growth, but Napa is lagging the competitive set. Napa's ADR remains the highest and is flat YOY.

All jurisdictions saw occupancy over 70%, with Yountville's town buy-out driving double-digit YOY growth.

Luxury properties saw notable increase in occupancy leading strong RevPAR against minimal ADR growth.

STR Source: Smith Travel Research, June 2026.

LODGING: YTD JAN-JUN 2026

COMPETITIVE REGIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
Napa County	**62.4%**	**0.8%**	**$418.73**	**3.1%**	**$261.40**	**4.0%**
Sonoma County	61.8%	7.0%	$207.51	1.7%	$128.17	8.9%
Monterey County	69.2%	4.0%	$256.36	4.3%	$177.42	8.4%
San Luis Obispo County	65.6%	3.0%	$188.63	3.9%	$123.73	7.0%
Santa Barbara County	68.1%	3.9%	$252.82	6.5%	$172.23	10.6%
San Francisco County	71.8%	9.3%	$290.75	13.6%	$208.75	24.2%

JURISDICTIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
American Canyon	70.5%	3.7%	$147.43	-4.7%	$103.93	-1.2%
Napa (City of)	63.4%	-1.8%	$346.93	1.7%	$219.95	-0.2%
Yountville	55.5%	6.7%	$705.94	3.5%	$391.52	10.4%
St. Helena	66.4%	-0.1%	$570.28	0.3%	$378.89	0.2%
Calistoga	60.9%	-0.7%	$566.72	6.4%	$345.16	5.7%
Unincorporated Co.	59.9%	8.7%	$587.49	3.6%	$351.96	12.7%

SERVICE TYPE	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
VNV Luxury	59.3%	6.2%	$976.53	3.7%	$579.17	10.1%
VNV Limited-Service	66.8%	-1.9%	$194.44	-0.6%	$129.95	-2.5%
VNV Group	64.1%	0.2%	$315.32	1.3%	$201.97	1.4%

Takeaways:

Napa County occupancy is flat YOY, outpaces Sonoma but lags central coast markets.

Yountville, Calistoga, and Unincorporated County have grown RevPAR, with remaining jurisdictions flat.

Luxury has balanced rate and occupancy for continued RevPAR growth with Limited-Service showing declines.

STR Source: Smith Travel Research, January-June 2026.