

FISCAL YEAR 2027

Annual Plan

VISIT Napa Valley®



FY27: JULY 2026–JUNE 2027

About Visit Napa Valley 3
Destination Partner Ecosystem 4
Visit Napa Valley Staff 5
Visit Napa Valley Departments 6
Business Goals 7
Objectives 8
FY26 Performance: Visitor Profile & Economic Impact Study Report Findings 9
FY26 Highlights 11
Brand Platform & Campaign 13
- Evolving the Brand Platform 14
- Brand Architecture 15
- New Brand Campaign: Live a Little or a Lot 17

FY27 Business & Economic Landscape 25
FY27 Marketing & Sales Plan 33
- Target Markets & Audiences 34
- Brand Messaging Framework 37
- Paid Media 41
- Owned Media 47
- Earned Media 50
- Sales & Business Development 51
- Partner Relations & Events 55
- Welcome Center & Guest Experience 57
- Community & Industry Relations 59
- Industry Collaboration & Engagement 60
- Metrics & Measurement 61
- Budget 62

Appendix
- FY27 Board of Directors 65
- Founders' Circle & Premium Partners 68
- FAQs 69
- Connect with Visit Napa Valley 71

Visit Napa Valley is 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.

Our Vision

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

Our Mission

Promote, protect, and enhance the Napa Valley destination

Strategic Pillars

MARKETING & SALES

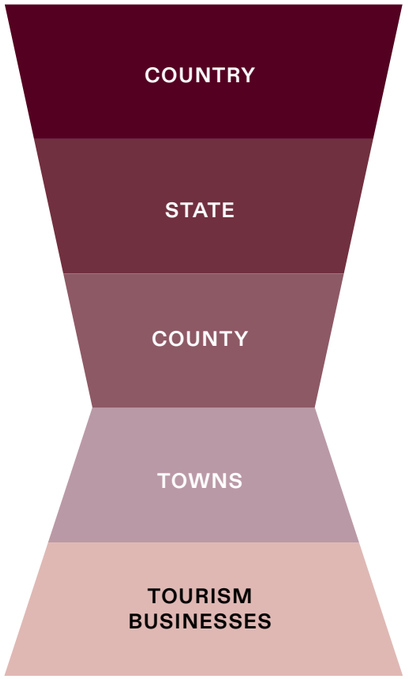
DESTINATION MANAGEMENT

PARTNER ENGAGEMENT

ORGANIZATIONAL EXCELLENCE

Destination Partner Ecosystem

Representing the voice of the hospitality and tourism community, Visit Napa Valley partners with organizations on national, state, and regional levels to foster the greatest impact for local destination partners and tourism businesses. Visit Napa Valley strategically plans and prioritizes high-return initiatives, leveraging its influence in broader advocacy, marketing, and sales efforts to maximize the performance of our resources. Visit Napa Valley serves as the unifying force behind the region's tourism industry — advocating a shared vision, amplifying collective reach, and driving visitation across all five towns. Visit Napa Valley elevates the entire destination, creating desire and intent to visit and return again.



Promoting the United States as a premier travel destination

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

Promoting Napa Valley to key markets near and far

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

Capitalizing on overarching Napa Valley brand

Unique town personalities & offerings

Capitalizing on overarching Napa Valley brand & towns

Content and offers from hotels, wineries, restaurants, shops, attractions, events, etc.

Staff

DESTINATION MARKETING ORGANIZATION (DMO)

Linsey Gallagher

PRESIDENT & CEO

MARKETING & SALES

LISA POPPEN
Vice President, Marketing & Sales

BECKY BARRANGO
Director, Sales

HANNAH REDDING
Manager, Group Sales

VICTORIA RIYAZI
Manager, Leisure Sales

JAMES FREEMAN
Associate, Sales Systems

LESLIE MILLER
Manager, Data & Insights

CHELSEA LAZZARI
Associate, Marketing Systems

PARTNER RELATIONS & EVENTS

NICHOLE PETERSON
Director, Partner Relations & Events

REBECCA OROZCO
Associate, Partner Relations & Events

EXECUTIVE ADMINISTRATION, FINANCE & OPERATIONS

TERESA COLEMAN
Controller

YESENIA GONZALEZ
Senior Associate, Finance

RAQUEL SANCHEZ
Office Administrator

NAPA VALLEY WELCOME CENTER & GUEST EXPERIENCE

LESLIE JESSOP
Manager, Guest Experience

MELISSA MCGREEVY
Associate, Guest Experience

LEILA MILLAN
Associate, Guest Experience

MAGGIE MONTGOMERY
Associate, Guest Experience

LORETTA RADEY
Associate, Guest Experience

DOUG SMITH
Associate, Guest Experience

ADRIANA VARGAS
Manager, Mercantile

Departments

MARKETING & COMMUNICATIONS	Promote the Napa Valley brand through cohesive awareness and affinity strategies via integrated programs and initiatives, including paid, owned, earned media
SALES & BUSINESS DEVELOPMENT	Cultivate strategic relationships with tourism trade professionals — including meeting planners, tour operators, and travel agents — to educate and inspire consideration of Napa Valley as the premier destination for group and leisure clientele
PARTNER RELATIONS & EVENTS	Support hospitality and tourism partner businesses by providing a network of touchpoints for optimizing marketing channels, resources, and events
COMMUNITY & INDUSTRY RELATIONS	Collaborate with community stakeholders to maintain sustainable, actionable, and measurable destination stewardship initiatives
DATA & INSIGHTS	Provide market intelligence and data to assist the hospitality and tourism industry in making informed business decisions

Business Goals

Achieve or exceed the Tourism Improvement District (TID) revenue budget by driving overnight lodging demand through strategic and deliberate marketing and sales initiatives

Grow Transient Occupancy Tax (TOT) collections, leading to enhancement in county-wide infrastructure and resources for enriching quality of life for residents

Objectives

Cultivate the Napa Valley Brand

- Create awareness and desire to experience Napa Valley
- Deploy multi-channel storytelling efforts honoring Napa Valley as a wine destination, while also highlighting its defining characteristics, including culinary, wellness, arts & culture, outdoor activities, seasonality, and five distinct towns
- Showcase the signature businesses, unforgettable experiences, and vibrant community that collectively define Napa Valley as a premier, must-visit destination

Inspire and Motivate Travel

- Drive overnight-lodging demand and stimulate year-round visitation by positioning Napa Valley as a world-class destination that delivers exceptional value and luxury experiences
- Engage leisure travelers across drive-market, greater California, and near North American (Canada and Mexico) audiences with enticing visitation options
- Grow the group business segments by engaging with professional meeting planners to promote Napa Valley as a unique meeting destination

Support the Local Hospitality and Tourism Industry

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

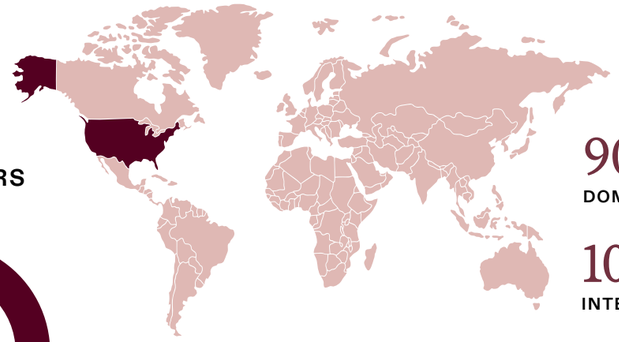


NAPA VALLEY TOURISM ECONOMY ECONOMIC IMPACT

The 2025 Economic Impact analysis compiles and analyzes data on how visitor spending affects local businesses, employment, personal income, and tax revenue across Napa County

Napa Valley welcomed a total of

3.8M TOTAL VISITORS



90% DOMESTIC

10% INTERNATIONAL

38% OVERNIGHT GUESTS



62% DAY-TRIP VISITORS

99% of overnight visitors are satisfied or very satisfied with their trip to Napa Valley

Visitors to Napa Valley spent

$2.2B SUPPORTING LOCAL BUSINESSES



$718M LODGING



$647M RETAIL & WINERIES



$505M FOOD & BEVERAGE

Spent by non-hotel guests **$264M**

Spent by overnight hotel guests **$1.97B**



90% OF SPENDING WAS GENERATED BY OVERNIGHT GUESTS



$6M VISITOR SPEND ON AN AVERAGE DAY

Napa Valley's visitor industry generated

$162.5M IN TAX REVENUE FOR LOCAL 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

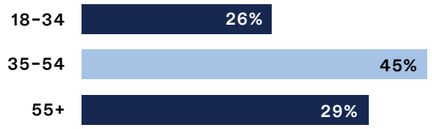
Source: 2025 Economic Impact Report by Tourism Economics

NAPA VALLEY TOURISM ECONOMY VISITOR PROFILE

The 2025 Visitor Profile Study expanded to include both past and prospective visitors for the first time, capturing domestic origin and spend, destination image and satisfaction, trip characteristics, and demographics to reveal where Napa Valley's next wave of demand will come from

Demographics

AGE



46 AVG. AGE

35% of first-time visitors are aged 25–35





78% MARRIED



66% EARN $100-200K



88% COLLEGE EDUCATED



26% EARN $200K +

ETHNICITY*



*Respondents could select multiple categories

How visitors move throughout Napa Valley

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

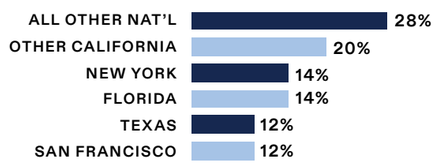
Read across by row

Who visits, and from where

50% FIRST TIME | 50% REPEAT

Repeat visitors average 6 total trips (per lifetime)

TOP OVERNIGHT MARKETS



Trip motivators



61% WINE & WINERIES



35% ROMANTIC GETAWAY



32% FAMILY VACATION



27% CELEBRATION



16% SPECIFIC ATTRACTION

Trip profile



68% of overnight visitors live outside of California



85% travel with a spouse or partner



4.4 nights: average overnight trip



$771 average nightly spending, overnight visitors



99% of overnight visitors are satisfied or very satisfied

Source: 2025 Visitor Profile Report by Strategic Marketing & Research, Inc. (SMARI)

FY26 Program Highlights

Key Metrics JULY 2025–JUNE 2026

Digital & Print Advertising

107 Million +32% YOY
CAMPAIGN IMPRESSIONS

17M
VIDEO VIEWS

0.58%
CLICK-THROUGH RATE
0.45% goal

:21s
AVERAGE ENGAGEMENT DURATION
:10s benchmark

Website & Email

3.4M
ANNUAL WEBSITE SESSIONS
+9.7%YOY

1.5M
PARTNER WEBSITE REFERRALS
+25%YOY

65K EMAIL SUBSCRIBERS -8% YOY

Social Media

55M +71% YOY
MILLION IMPRESSIONS

467K +4% YOY
FOLLOWERS

Media Relations

1.3 Billion +28% YOY
EARNED MEDIA IMPRESSIONS

Group Sales

$89 Million +14% YOY
ECONOMIC IMPACT

217K +14% YOY
ROOM NIGHTS

923 +20% YOY
MEETING LEADS DISTRIBUTED

97K +8% YOY
DELEGATES

Travel Trade **42** EVENTS

1K PARTNER REFERRALS +6% YOY

Partnership & Guest Experience

NAPA VALLEY WELCOME CENTER

96K
ANNUAL VISITORS
-7.7%YOY

128K
PARTNER REFERRALS
+40%YOY

580
TOTAL PARTNERS
+6%YOY

81
PARTNER VISITS
+240%YOY

65K
VISITOR MAGAZINE

7.7K
PORTAL LOGIN SESSIONS
+15%YOY

129
PARTNER INFORMATION MEETINGS
-3%YOY





Brand Platform & Campaign

Evolving the Brand Platform

- Culinary tourism is surging, with US consumers four times more likely to splurge on food and beverage than any other category. There is a natural opportunity for Napa Valley as shifting beverage preferences, wellness focus, and generational change reshape the wine category nationally.
- At the same time, consumer research confirmed that visitors already describe Napa Valley in superlative terms — a world-class, bucket-list destination with a uniquely Californian laid-back vibe: upscale and luxurious, but never stuffy or pretentious
- The concept of “the good life” resonated broadly across all visitor types — spanning indulgence, connection, slowing down, and savoring experiences — making it the ideal platform to unite wine, culinary, wellness, and lifestyle under one brand idea
- Research also revealed that Napa Valley does not need to water down its luxury positioning to appeal to a wider audience. Aspirational consumers are already inspired by luxury creative, signaling that the brand’s premium identity is an asset.
- Together, these insights pointed to a clear strategic opportunity: evolve the brand platform to position Napa Valley as the premier lifestyle destination where world-class wine, food, and experiences come together, anchored by the brand promise of “A Taste of the Good Life” and brought to life through the new brand campaign, Live a Little or a Lot



Brand Architecture

BRAND PROMISE	A Taste of the Good Life — what Napa Valley delivers to its visitors
BRAND PURPOSE	Crafting excellence in everything Napa Valley does
BRAND PERSONA	A great host — warm, confident, passionate, joyful, appreciative, knowledgeable; inviting guests to experience the good life through luxury, excellence in craft, and hospitality
FUNCTIONAL BENEFIT	An abundance of bespoke, world-class hospitality, wine, cuisine, wellness, outdoor activities, arts, and culture, concentrated in a bucolic setting
EMOTIONAL BENEFIT	Time for pure indulgence, enjoyment, and connection





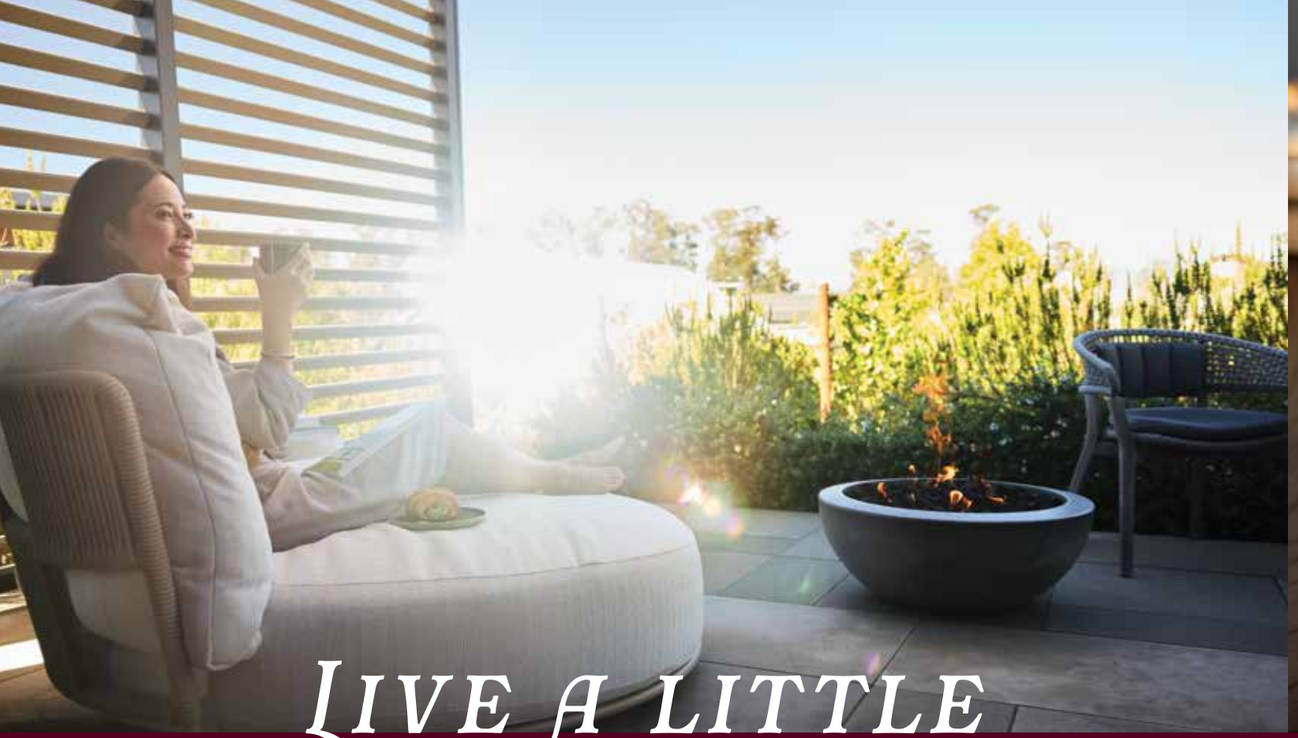


Live a little or a lot

New Brand Campaign

The Live a Little or a Lot campaign serves as the hero brand storytelling layer, showcasing Napa Valley and its brand promise to deliver the best that life has to offer

When everything is world-class, even the simplest experiences feel effortlessly elevated. Welcome to Napa Valley, where the world's greatest wines, the world's greatest food, and unmatched experiences provide the backdrop for unprecedented luxury. Which means visitors have a whole range of options for just how extravagant their Napa Valley experiences can be. They can choose to Live a little or a lot...



LIVE A LITTLE

THERE ARE UPSCALE ACCOMMODATIONS, AND THEN THERE ARE UPSCALE ACCOMMODATIONS THAT COME WITH PRIVATE CHEF CURATED WINE DINNERS, DAILY SPA TREATMENTS AND YOUR OWN VINTAGE CONVERTIBLE TO CHASE THE LIGHT THROUGH THE VINEYARDS.

OR A LOT





LIVE A LITTLE

THERE'S A BRUNCH WINE TASTING IN A DREAMY GARDEN SETTING, AND THEN THERE'S A SPARKLING SUNDAY BRUNCH WITH SIX COURSES OF SHARED PLATES WITH A MAGNUM OF RESERVE BRUT FOR DESSERT - BECAUSE WHY WOULDN'T YOU?

OR A LOT





LIVE A LITTLE

THERE'S A LEISURELY LUNCH WITH FRIENDS. AND THEN THERE'S A SEVEN-COURSE GOURMET TASTING LUNCH, WITH SEVEN PERFECT WINE PAIRINGS, ABOARD A FULLY RESTORED 1915 PULLMAN RAIL CAR AS IT FLOATS PAST ROLLING HILLS AND ROWS OF VINES STRETCHING OUT AS FAR AS THE EYE CAN SEE.

OR A LOT



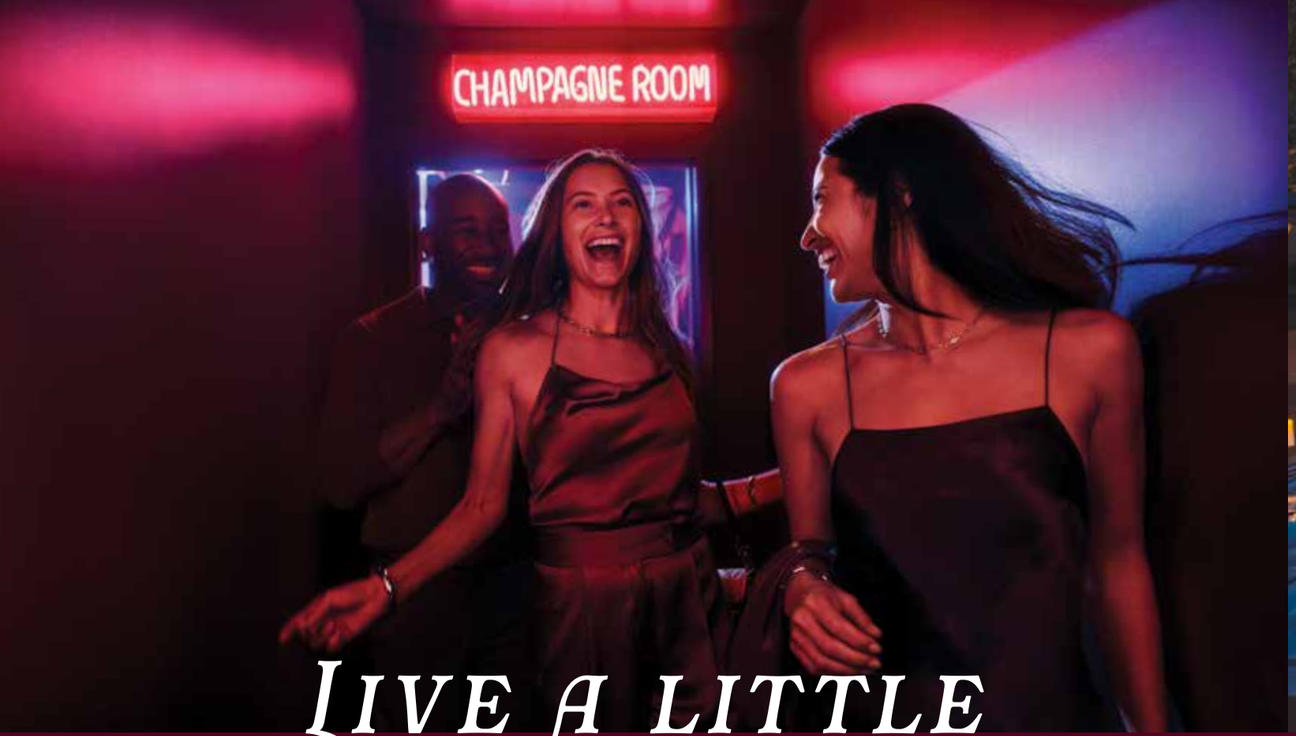


LIVE A LITTLE

THERE ARE WONDERFUL DINNERS, AND THEN THERE ARE PERFECTLY ORCHESTRATED, MICHELIN-STARRED WINE DINNERS FEATURING CAVIAR PRETZELS WITH LAVENDER BUTTER, AMERICAN WAGYU WITH PRESERVED PEPPER JUS, AND LOCAL FIGS TRANSFORMED INTO EDIBLE ART SURROUNDED BY THE LARGEST COLLECTION OF NAPA VALLEY WINES IN THE WORLD.

OR A LOT



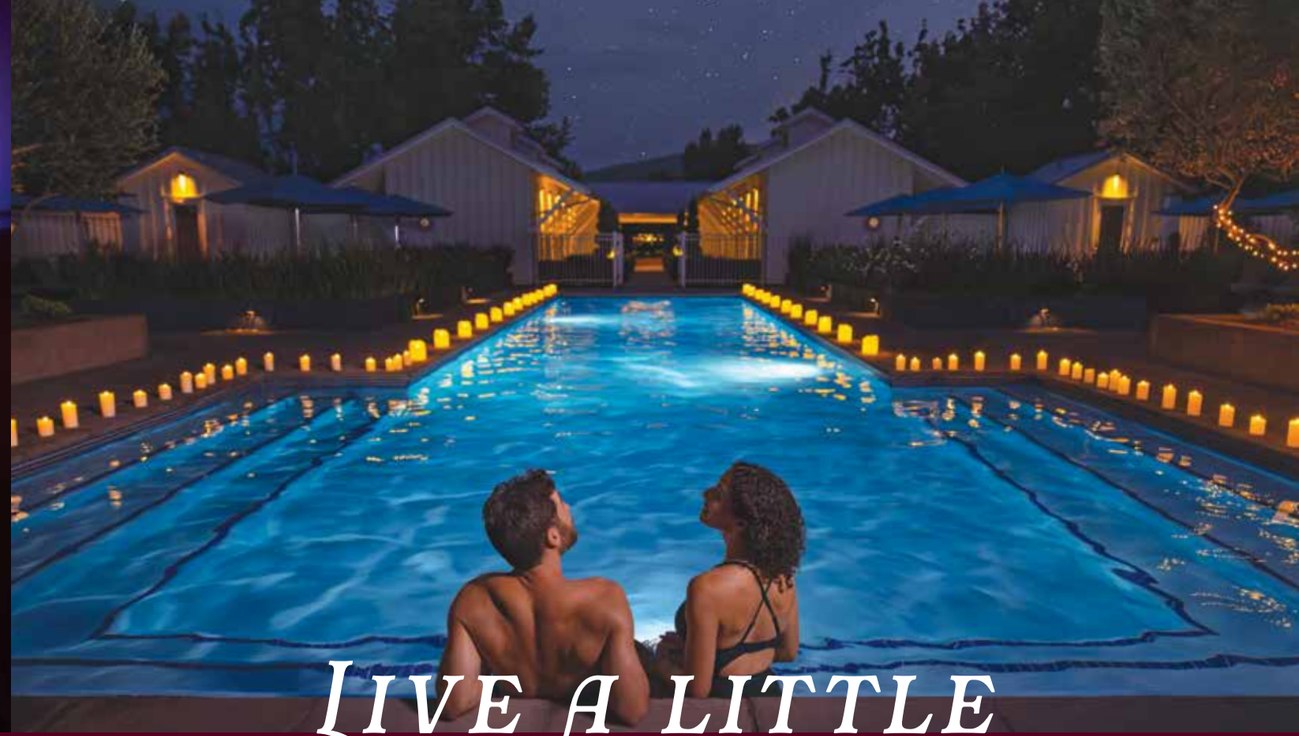


LIVE A LITTLE

THERE ARE LOCAL HOT SPOTS, AND THEN THERE ARE LOCAL HOT SPOTS WHERE YOU SIP WITH VINTNERS AND RUB ELBOWS WITH MICHELIN-STAR CHEFS, WHILE DISCUSSING THE TRANSGENDENT DECADENCE OF A TRUFFLE-SHAVED GRILLED GHEESE.

OR A LOT





LIVE A LITTLE

THERE ARE LUXURIOUS SPA TREATMENTS, AND THEN THERE'S A FULL-BODY MUD RITUAL FOR TWO, FOLLOWED BY YOUR OWN PRIVATE GEOTHERMAL POOL–COMPLETE WITH SPARKLING RESERVE ROSÉ, ARTISAN CHOCOLATES, AND FLICKERING CANDLELIGHT.

OR A LOT



FY27 Business & Economic Landscape

Business & Economic Landscape

Napa Valley enters FY27 at an important inflection point, as shifts in the wine industry, widening differences in traveler spending power, and rising consumer expectations around travel converge

- **The K-Shaped Traveler:** "K-shape" means the income gap is widening. Travel spending is following the same pattern. The top 10% of US earners drove roughly half of consumer spending in mid-2025 (Hospitality Horizons, 2026), while middle-income households cut back. Even high-income travelers are tightening wallets. Across every traveler tier, value framing will matter more.
- **Domestic Markets:** International recovery is slow and uneven, putting more weight on domestic markets to perform. California drive markets — particularly the Bay Area — carry much of that weight. A bifurcated economy of tech layoffs in some sectors alongside AI-driven wealth in others is reshaping traveler behavior, making value framing more important, even among higher earners. Southern California represents an important close fly-market opportunity, where building brand desire paired with clear, compelling reasons to visit will be key to converting interest into trips.
- **Group & Meetings Demand Growth:** Domestic group travel is expected to outpace business travel overall. Group bookings strengthen demand during midweek and shoulder-season windows, complementing leisure travel patterns, while corporate and incentive groups buy at the top of the market. With occupancy projected to be slightly down, group demand is one of the clearest levers for protecting RevPAR.
- **Length-of-Stay Opportunity:** As occupancy softens, length of stay becomes a bigger part of the revenue story. Far markets — where the flight investment justifies a longer trip — tend to deliver more nights per visit, while regional drive markets supply volume on shorter trips.
- **Wine Industry Evolution:** The wine market is recalibrating, and that raises the value of everything around the glass (Silicon Valley Bank, 2026). Wine stays central to the Napa Valley experience, while hospitality, culinary, and wellness give visitors a fuller, richer set of reasons to come.



Consumer Travel Trends

Travelers are buying differently than they were two years ago: more deliberate, more value-aware, more wellness-motivated, and harder to pin to specific segment labels

- **Slow Travel & Deeper Access:** Affluent travelers want fewer destinations, longer stays, and more meaningful access: smaller crowds, slower itineraries, more cultural immersion, and willingness to spend if it feels worth it (Virtuoso, 2025)
- **Next-Generation Wine Lovers:** Millennials now make up 31% of wine drinkers, ahead of Boomers at 26% (Wine Market Council, 2025). They drink less but spend more per bottle. Meeting them means leaning into lower-ABV pours, educational tastings, and wine framed as part of the food and wellness experience.
- **Wellness as a Trip Driver:** More than 90% of luxury travelers actively look for wellness programming when booking (International Luxury Travel Market, 2026). Demand is highest for slower, nature-rich experiences and, notably for Napa Valley, shared wellness (i.e., friends' weekends, couples programming, and multi-gen retreats).
- **Value Scrutiny at Every Tier:** Affluent travelers aren't opting out; they're auditing what they get for their spend, booking off-peak, and adjusting itineraries based on perceived value. Value sensitivity now reaches the top of the market, not just the middle.

Marketing & Sales Trends

PAID MEDIA

Paid Media in 2026 is defined by streaming dominance, the closing distance between brand and performance, and a real expectation that first-party data is the connective layer between them

- **Connected TV:** Streaming has passed broadcast and cable in total viewing time (eMarketer, 2026). For destinations selling beauty and story, CTV delivers scale and attention that paid social can't match, which points toward CTV-first video with paid social in support.
- **Streaming Audio & Lifestyle Podcasts:** Branded segments in wellness, culinary, and travel podcasts reach target audiences in commute and at-home moments where display can't. They're now bookable on the same audience signals as CTV, which makes cross-channel planning easier than ever.
- **AI-Driven Media Optimization & Discoverability:** Real-time bidding, dynamic creative, and intent modeling are all standard now. The edge isn't access to AI tools; it's the quality of the first-party data and creative fed into them. It is also increasingly more important whether that content is structured to be discoverable by AI search and recommendation engines in the first place. The investment that matters is upstream.
- **Cross-Channel Frequency Discipline:** As inventory expands across CTV, retail media, and streaming audio, the risk flips from underexposure to fatigue. Deduplicated frequency management becomes more of a priority.



OWNED MEDIA

Owned channels have to do more work than ever because the first mile of discovery moved upstream into AI. The destinations that adapt to how AI reads, cites, and recommends content this year will be the ones AI recommends first.

- **AI Search Visibility:** Roughly 65% of Google searches now end without a click (Zero-Click Search Statistics, 2026). LLMs are shaping the consideration set before travelers reach a destination's owned channels. This requires structured content updates and measurement built around citation, not just click volume.
- **Conversational, Vibe-Led Search:** Queries have shifted from "5-star hotel in Napa" to "quiet wine country stay with rooms with a view and good food." Page architecture, tone, and metadata need to reflect how people actually ask AI tools — a shift from SEO best practices of the past.
- **UGC Syndication & Social Proof:** Visitor content, curated and amplified, closes the trust gap for first-time travelers and is increasingly the material AI tools cite when describing a destination. It also functions as a free creative pipeline.
- **Hyper-Personalization:** Dynamic itinerary modules, behavior-triggered offers, and segment-aware homepages convert better than static destination pages, and they quietly capture the zero-party data that sharpens every next interaction

MARKETING & SALES TRENDS

EARNED MEDIA

Earned has become one of the highest channels to leverage as part of the marketing mix. Editorial credibility, micro-influencer authenticity, and word-of-mouth do real work across the planning journey, and they're what AI tools pull from when describing the destination.

- **Editorial Coverage & AI Citations:** Long-lead and digital-first features in trusted travel, food, and wellness outlets continue to drive shortlists and, increasingly, AI citations
- **Micro-Influencer Clusters:** Niche creators outperform big-name endorsements on authenticity. The shift worth making is from one-off campaigns to ongoing relationships with creators whose audiences already overlap target segments.
- **Podcast Features & Long-Form Audio:** Guest spots on travel, wellness, and food podcasts deliver intimate, high-trust storytelling. The play is proactive booking, not waiting for inbound interest.
- **FAM & Virtual Press Programs:** Live-streamed winery experiences, immersive media previews, and traditional press trips remain among the most efficient ways to seed editorial coverage that drives both human and AI-mediated discovery



GROUP & TRAVEL TRADE

Group, business, and leisure travel trade are all being redefined by purpose. Companies are asking why a trip needs to happen at all, travel advisors are becoming more essential to how affluent leisure travelers book, and AI is reshaping how trips get planned across every segment — all of which raise the bar for what a destination needs to deliver.

- **Purposeful Business Travel:** Events, conferences, client meetings, and trade shows now lead as the top drivers of business travel, prized for relationship-building that virtual meetings can't replace (Cvent, 2025). The result is fewer routine trips, but higher-stakes, higher-value ones.
- **Bleisure Goes Mainstream:** Zurich's 2026 Business Travel Outlook found that 81% of travelers plan to combine business and leisure, with 61% specifically adding leisure time to a business trip. Meetings destinations are now judged as much on restaurants, culture, and wellness as on the venue itself.
- **AI Across the Trip:** GBTA's 2026 research found 41% of travel organizations are proactively implementing AI, with another 28% using it embedded in existing tools. Travelers increasingly expect frictionless booking, personalized itineraries, and real-time flexibility.
- **Experience-Driven Meetings:** Hilton's 2026 research found 49% of attendees see bonding with colleagues as a primary reason to attend work events, while 67% say downtime is important to staying engaged. Experiences and flexibility are becoming as important to planners as the meeting itself.
- **Incentive Travel as Business Strategy:** Incentive trips are evolving beyond a reward into tools for employee engagement and client retention, with companies favoring smaller, more personalized groups over larger ones (NUBA, 2026). Wellness, authenticity, and exclusivity are now core expectations, not add-ons.
- **Leisure Travel Advisors, Elevated:** Virtuoso's network of 20,000+ advisors is growing more influential, with 2026 sales up over 20% year-over-year as AI commoditizes basic destination information (Virtuoso, 2026). Travel agents and tour operators increasingly compete on judgment, access, and insider knowledge, making destinations that equip advisors with differentiated stories and bookable experiences more likely to be recommended.





FY27 Marketing & Sales Plan

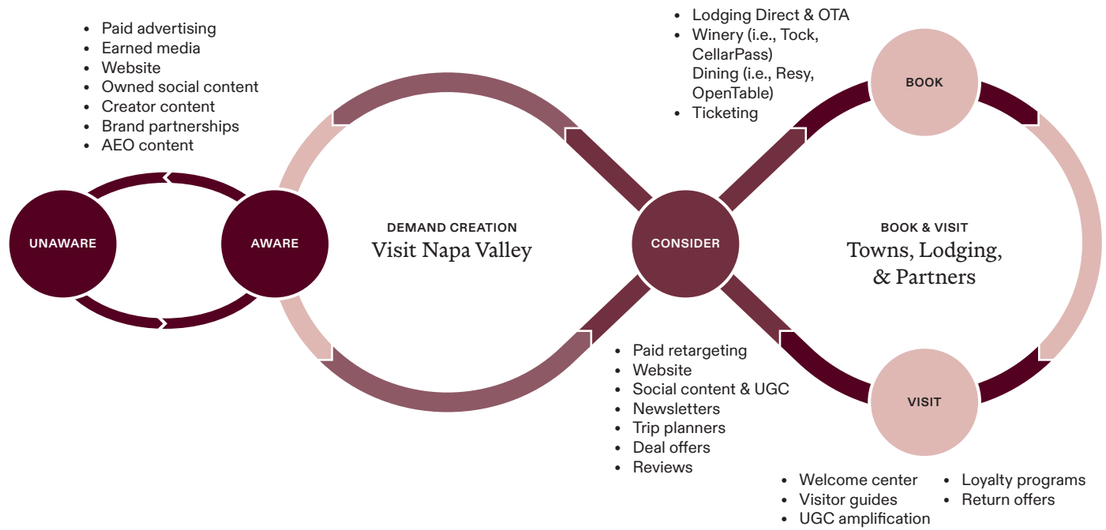


Visit Napa Valley's Fiscal Year 2027 Annual Plan turns long-range planning into a year of action: an integrated marketing and sales effort across paid, earned, owned, and direct outreach, all working to drive overnight-lodging demand and strengthen a thriving destination — one that supports the wine industry, tourism businesses, and the community that calls Napa Valley home.

What's changed is how we get there. The path to a booking isn't a straight line. Visitors who discover Napa Valley may drift, return, and move between our channels and our partners' long before they reserve a room. The work is the same: build awareness, cultivate demand, and turn interest into an overnight stay — as well as into visits to the wineries, restaurants, and businesses that make up the destination. It just doesn't happen in order anymore.

The FY27 plan is built around the journey as it really behaves: always-on, cross-channel, and shared. Visit Napa Valley brings the demand. Together with towns, lodging, and tourism partners, we turn inspired travelers into guests, making the most of every visit and earning their return visit.

CONSUMER JOURNEY



INTEGRATED PROGRAMMING

Driving Awareness & Affinity at
All Touchpoints on All Channels

VISIT Napa Valley®

- MARKETING & COMMUNICATIONS
- SALES & BUSINESS DEVELOPMENT
- PARTNER RELATIONS & EVENTS
- COMMUNITY & INDUSTRY RELATIONS
- DATA & INSIGHTS

PAID MEDIA

- Online Television (OTV)
- Digital Video
- Programmatic Digital & Native
- Paid Social
- Rich Media
- Search Engine Marketing (SEM)
- Custom Content Integrations
- Print

OWNED MEDIA

- Website
- Social Media
- Email/Newsletter
- Blog
- Visitor Magazine
- Napa Valley Welcome Center
- Local Radio/Streaming Radio
- Events/Sponsorships
- Marketing/Informational Materials

EARNED MEDIA

- Lifestyle General Interest
- Niche Interest (e.g., wine, culinary, wellness/spa)
- Tourism Industry/Business
- Media Familiarization Trips (FAMs)
- Influencer Engagement
- Local Tourism Matters

SALES & BUSINESS DEVELOPMENT

- Trade Shows
- Sales Missions
- FAM Tours
- Educational Webinars
- Travel Trade
- Group Trade
- Industry Association Affiliations
- Print
- Paid Social
- Digital
- Rich Media

Target Markets & Audiences

Our targeting strategy uses data-driven audience and market insights to focus investment where we can most effectively reach repeat and prospective visitors and maximize overnight stays

PAID MEDIA

Wine & Culinary Enthusiasts

Expanded Targeting: LGBTQ+ & Wellness Enthusiasts

Wine is the draw. The full destination experience is what brings visitors back.

- $150K+ HHI
- Food-and-wine lovers
- Experience-driven
- Often returning

MARKETS: WHERE WE REACH THEM

FOUNDATION

Drive Markets
SF Bay Area, Sacramento, East Bay. Proximity is the advantage; cost perception of overnight is the obstacle to counter.

GROWTH

Southern California
Los Angeles, San Diego, Inland Empire. Highest revenue potential growth markets

REACH

National
Texas, Florida, New York. Fly-market trips, longer stays, prestige-driven occasions that justify the distance

GROWTH AUDIENCES: WHERE WE'RE EXPANDING

EXPANSION

Aspirational Luxury
$100K–$150K HHI. Premium on their terms. Selective splurges and transparent value.

EMERGING

Family Travelers
Roughly 40% of Napa Valley visitors travel with adult children

PIPELINE

Next-Gen Wine Lovers
Ages 21–34, food-first, social-driven. Lower wine consumption, higher experience expectations, authenticity over polish.

SUPPLEMENTAL — Day-Trippers
Same-day drive-market visitors
A conversion target for adding overnight stays

Brand Messaging Framework

Key Messaging Pillars

These messaging pillars provide a consistent framework for Visit Napa Valley's marketing and sales efforts, shaping the stories, experiences, and proof points we prioritize across channels and audiences

Brand Promise | Taste of the Good Life

CAMPAIGN PLATFORM | LIVE A LITTLE OR A LOT

MESSAGING PILLARS

Wine

World-class wine, distinctive tasting experiences, and deeper ways to learn about what is in the glass

Wine, and...

The experiences that round out a Napa Valley trip, from shopping and biking to scenic adventures and experiences beyond wine

Culinary

Acclaimed restaurants, standout chefs, and food experiences that are each a reason to visit in their own right

Towns of Napa Valley

Five distinct towns, each with its own character and a different way to experience Napa Valley

Wellness

Mineral-rich hot springs, volcanic mud baths, and geothermal spa traditions born from the land itself, paired with biking, hiking, and mountain trails that make Napa Valley a place to recharge as well as indulge

Off-Peak Travel

Compelling reasons to visit beyond peak season, including Cabernet Season, Mustard Season, and Restaurant Month

Arts & Culture

Galleries, music, performances, installations, festivals, and other cultural experiences that expand the Napa Valley story

Stewardship

The heritage, people, practices, and long-term commitments helping to protect Napa Valley's land, agriculture, and community





Priority Audience Opportunities

These audiences offer opportunities to bring the messaging pillars to life around the interests, experiences, and occasions that can motivate a Napa Valley trip

Primary Audience | Wine & Culinary Enthusiasts

OPPORTUNITY AUDIENCES

Wellness Travelers

Restoration, spas, wellness, and outdoor connection

Multi-Gen Travel

Shared experiences and milestone trips across generations

Guy Trips

Food, outdoor experiences, and time together, with wine as part of the trip

Next-Gen Travelers

Food-led, experience-first travel with culture and discovery at the center

LGBTQ+ Travelers

Wine-country getaways built around milestone moments and shared experiences

Activating the Messaging Framework

Paid, owned, earned, and direct sales efforts work from the same messaging framework, reinforcing a consistent destination story while playing distinct roles in the sales and marketing mix



Paid Media



Objectives

- Continue to build momentum behind the Live a Little or a Lot campaign through standout, attention-grabbing ad environments
- Drive qualified traffic, with emphasis on on-site engagement
- Build awareness of Napa Valley as a destination across key target markets
- Drive consideration to visit Napa Valley and its five key towns through deeper content engagement, signaling interest in traveling
- Create paths that drive conversion to travel to Napa Valley, inclusive of partner passthroughs
- Increase overnight visitation, visitor spending, and length of stay
- Drive off-peak visitation, with emphasis on mid-week travel year-round

Strategies

- Build demand early and maintain continuous presence throughout the trip-planning cycle, recognizing that interest in Napa Valley is established well before a traveler begins actively planning a trip
- Flex channels by audience mindset, applying pressure at the right moments of intent to spark interest, reinforce consideration, and win the travel decision
- Tailor media approach by market role — maximizing efficiency of existing demand in drive markets, turning interest into committed travel in fly markets, and seeding future visitors in growth markets
- Lean into top media partner performers to build on the success of FY26, informed by strong channel results across CTV, paid social, and search
- Maintain an always-on layer as the foundation of the broader brand awareness campaign, driving consistent website traffic year-round
- Layer in strategic heavy-up periods during high-need windows to amplify impact when visitation demand is most needed
- Identify content opportunities that drive deeper engagement with the brand and showcase all Napa Valley has to offer
- Develop a creator program that reaches new opportunity audiences — including Gen Z, LGBTQ+, and men — through authentic, culturally relevant content that expands who considers Napa Valley as a destination
- Retarget qualified consumers and push toward booking

Tactics

01	Engage and inspire target audiences through custom ad creative and messaging that showcase the vast array and breadth of Napa Valley experiences, reaching qualified consumers across key markets throughout the trip-planning cycle
02	Promote exploration of Napa Valley's five unique towns by featuring each town's distinct vibe and experiences across custom and brand campaign creative layers
03	Encourage Trip and Experience Bookings through lower funnel conversion tactics that highlight wine tasting and accommodation offers
04	Reach Corporate Meetings and Incentive Trip Planners through targeted opportunities on trade channels that communicate the benefits of group travel to Napa Valley, while showcasing one-of-a-kind spaces; innovative, out-of-the-box experiences; and sustainable and "green" options
05	Support Napa Valley's Workforce Development efforts by promoting the benefits of a career in hospitality through strategically placed digital media targeting job seekers in the hospitality industry
06	Inspire and engage Local Audiences through a targeted media plan that meets residents where they are — across print, social, and community-level out-of-home — lifting up local residents and businesses while educating on the value of tourism to the economy and how it benefits their quality of life

Measurement

Each component of the paid media plan has a specific purpose and will be measured and optimized according to clearly defined Key Performance Indicators (KPIs)

DELIVERY METRICS

- Impressions
- Reach
- Frequency
- Spend
- Cost Per Mille (CPM), Cost Per View (CPV), or Cost Per Click (CPC)

Critical to ensure pacing and spending efficiency. Shows high-level awareness.

IN-PLATFORM PERFORMANCE

- Clicks
- Click-Through Rate (CTR)
- Video Views
- Video Completion Rate (VCR)
- Ad Engagements
- Time with Content

Generally, the KPIs for awareness campaigns fall into this category, focusing on broad-level metrics

ON-SITE PERFORMANCE

- Time on Site
- Pages Viewed
- Time on Page
- Form Fills
- Third-Party Referrals

Encompasses all on-site conversions. Used most in consideration and conversion campaigns.

ADDITIONAL TRACKING FOR LEARNING

- Content Views
- Social Engagements
- Social Listening
- Information Seeking
- Partner Feedback

Adds context on audience engagement and sentiment to complement core performance metrics

RESEARCH LEARNINGS

- Campaign Awareness
- Shifts in Sentiment
- Ad Favorability
- Behavior Shifts

Determine if the campaign is delivering on messaging objectives and resonating with audiences, in turn changing sentiment/behavior

LIVE A LITTLE OR A LOT

ASPIRATIONAL:
$100-$200K HHI
A25-49

LUXURY:
$200K+, A44+

RETARGETING:
SITE VISITORS, PAST CAMPAIGN ENGAGERS

Campaign Focus/Messaging

- Showcasing Napa Valley and its brand promise to deliver the best that life has to offer
- Highlights an array of experiences in Napa Valley in addition to wine, including culinary, wellness, and music

Geography

- Near: California, SoCal emphasis
- Far: Florida, Texas, New York

Campaign Elements: OOH, Digital, Social, Streaming Audio, Podcast, Editorial, SEM

JULY 2026–JUNE 2027

GROUP

Campaign Focus / Messaging

- Inspire and educate meeting planners and decision-makers to select Napa Valley for their next group event by highlighting unique “wine and” group experiences

Geography

- Primary: California
- Secondary: Midwest, Southwest

Campaign Elements: Digital, SEM

JULY 2026–JUNE 2027

LOCAL

Campaign Focus/Messaging

- Showcase the value of the visitor experience to the Napa Valley economy and community by highlighting local resident stories and local businesses

Campaign Elements: Digital, Social, Print, OOH

FEBRUARY 2027–JUNE 2027

WORKFORCE

Campaign Focus/Messaging

- Showcase the benefits of working in one of the most recognized hospitality destinations by way of breadth of roles and growth-path opportunities

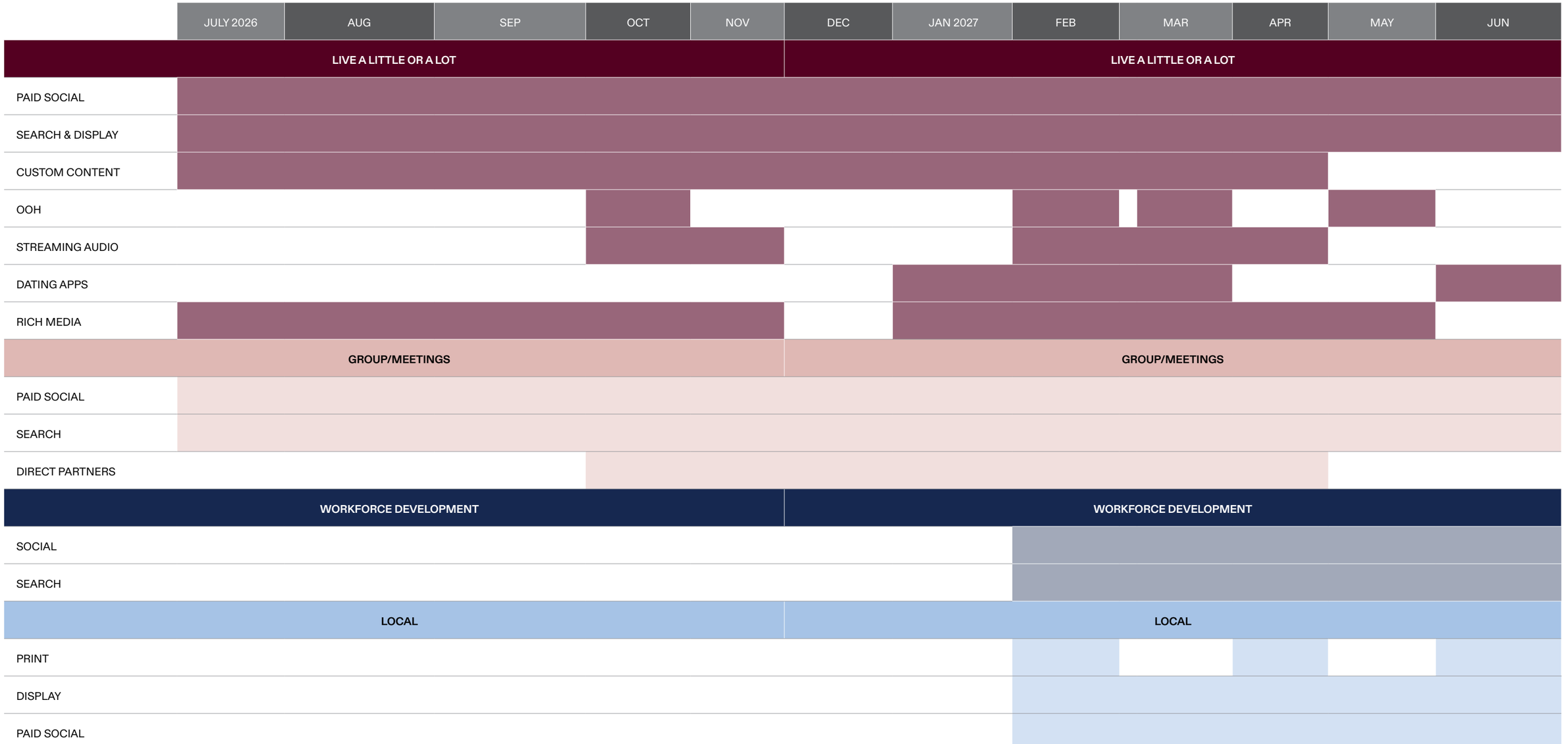
Geography

- Primary: Napa Valley
- Secondary: San Francisco DMA, Sacramento DMA

Campaign Elements: Social, SEM

FEBRUARY 2027–MAY 2027

VNV FY27 ROADMAP



Owned Media

Strategy

Create a coordinated content ecosystem across Visit Napa Valley's owned channels using the messaging pillars to tell a consistent, people-first destination story. The website serves as the content hub, with stories adapted and amplified across social, email, and other owned channels to increase discoverability, inspire travel, and connect visitors with partners.

Tactics

WEBSITE

- Build deeper content around priority travel topics and audience interests
- Strengthen SEO and AI discoverability with useful, authoritative content
- Increase website referrals to partners by 5% YOY

SOCIAL MEDIA

- Extend core stories across social with content tailored to each platform
- Use creators and influencers to reach priority audiences and secondary markets
- Grow followers by 5% and click-through rates by 1.5% YOY
- Leverage and support partner content

BLOG

- Publish timely editorial content that builds authority around Napa Valley travel
- Refresh content for search and AI discoverability
- Feature partner experiences throughout

EMAIL

- Grow the 65,000-person database through quarterly and evergreen lead generation
- Use newsletters to drive qualified traffic to Visit Napa Valley and partner content

VISITOR MAGAZINE

- Distribute 65,000 issues nationally with 4x readership
- Publish 2027 edition in January





Earned Media

Strategy

Use earned media, influencers, and creators to broaden how Napa Valley is talked about and discovered, moving beyond traditional wine and culinary coverage to build relevance across travel, lifestyle, and culture. Partner expertise, destination research, and timely trends will help create stronger stories and reach new audiences through both established and emerging voices.

Tactics

01	Develop proactive storylines tied to the messaging pillars, priority audiences, and seasonal opportunities
02	Build relationships across national, regional, lifestyle, local, and group/travel trade media, as well as influencers, creators, newsletters, podcasts, and other emerging platforms
03	Partner with relevant creators and influencers to bring priority Napa Valley stories and experiences to new audiences
04	Host targeted individual and small-group media and creator visits that bring priority stories to life
05	Use partner experts, local voices, and destination research to strengthen pitches, content, and coverage
06	Pursue selective brand and content collaborations that introduce Napa Valley to new, qualified audiences
07	Build B2B hospitality and wine-industry relationships through targeted outreach, coverage, and partnerships that support Napa Valley's standing within the industry itself
08	Advance public affairs efforts that communicate the value of tourism to residents, local government, and industry stakeholders

Sales & Business Development

Strategy

Prioritize personal connections and strategic collaboration to drive additional room nights and deliver greater value to members through impactful site visits, FAM tours, and client events focused on key regions (California, the Midwest, and Southwest). Expand the sales team with a focused presence in the Bay Area and California to deepen coverage in a priority drive market. Foster alignment around market needs and opportunities through regular group calls with hotel sales leaders.

Tactics

01	Attend key meeting industry tradeshows (IMEX, PCMA) and join Visit California domestic sales missions targeting California, Midwest, and Southwest markets
02	Host Napa Valley FAM trips and site inspections for meeting planners during need-period months (November–April) with structured follow-up and ROI tracking
03	Conduct Bay Area, California, and other key market Visit Napa Valley roadshows
04	Reduce Cvent dependency through proactive outbound prospecting. Build a KPI dashboard in Symphony and hold regular calls with hotel sales leaders to align on pipeline and need-period priorities





Strategy

Deepen relationships with luxury travel advisors, tour operators, and consortia to increase visitation to Napa Valley during weekdays and need periods. Prioritize high-touch engagement and experiential education to position Napa Valley as a must-recommend luxury leisure destination worthy of repeat visitation among domestic and near international markets (Canada/Mexico).

Tactics

01	Partner with Visit California on co-op marketing campaigns, FAM trips, and luxury consortia in key domestic markets
02	Develop a formal FAM and site inspection program with clear invitation criteria, structured itineraries, and post-visit follow-up to convert trade relationships into bookings
03	Pursue Canada planner and travel advisor outreach in partnership with Visit California, with a focused strategy to recover declining Canadian visitation within 18 months
04	Conduct Visit Napa Valley and partner sales missions in key domestic markets
05	Audit international tradeshow attendance for ROI and reallocate budget toward higher-converting activities



Partner Relations & Events

Strategy

Strengthen and expand partner engagement, deepen community collaboration, and maximize the use of Visit Napa Valley marketing platforms to elevate the destination's impact and drive sustained growth and visibility for all partner businesses

Tactics

01 Continue to educate, inform, and recruit partner businesses by promoting engagement opportunities and Visit Napa Valley tools and resources. Incorporate destination stewardship best practices to achieve a 90%+ partnership retention rate. Continue sharing marketing and media opportunities with the full partnership base to broaden awareness of Visit Napa Valley initiatives.

02 Deepen community and partner relations through sponsorship and educational initiatives that emphasize the positive economic, cultural, and environmental impacts of the hospitality industry in Napa Valley

03 Showcase the value of Visit Napa Valley partnership by ensuring every partner is well-represented across digital and print platforms; reinforcing that alignment with the Visit Napa Valley brand amplifies exposure to key visitor audiences. Support partner success through training sessions, tourism-focused webinars, and consistent, targeted communications that highlight opportunities and strengthen engagement year-round.

PARTNER MEMBERSHIP INVESTMENT LEVELS

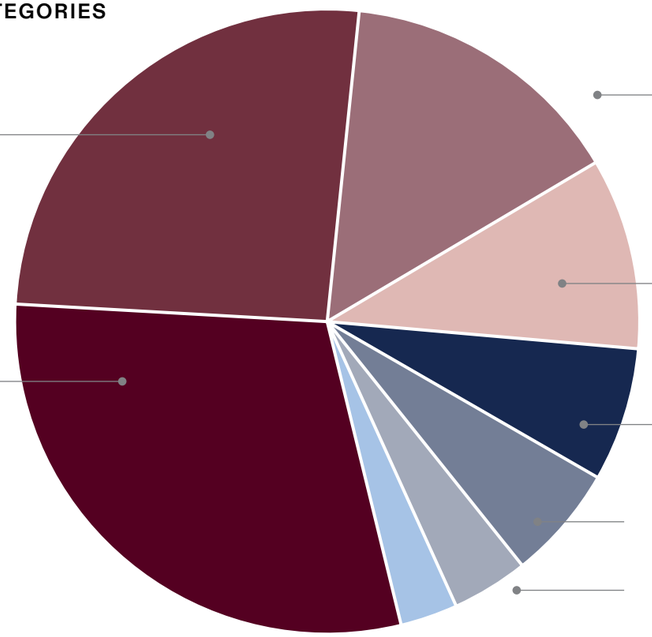
STANDARD Fully inclusive level of partnership, including VNV website listings, industry events, marketing and communications support, sales leads, access to research & data

STANDARD PLUS Upgraded level of partnership, including an elevated listing placement on Visit Napa Valley website

PREMIUM The paramount level of partnership, including featured listing placement on Visit Napa Valley website, priority consideration for marketing editorial content and sales leads, high-impact visual presence on the Napa Valley Welcome Center big screen, invitations to exclusive trade shows and sales events



PARTNERSHIP CATEGORIES



NUMBER OF PARTNERS

LODGING: 127
WINERY: 146
RESTAURANT: 72
ART: 48
ATTRACTION: 33
SERVICE: 28
WELLNESS/SPA: 18
TOUR/TRANSPORTATION: 15

All lodging properties in Napa Valley are partners of Visit Napa Valley. Lodging properties help all of our initiatives grow the Transient Occupancy Tax (TOT)

Welcome Center & Guest Experience

Strategy

The Napa Valley Welcome Center in the City of Napa will continue to serve as a key touchpoint for visitors and residents alike, driving qualified guest referrals to hospitality and tourism partner businesses valley-wide; offering personalized service and recommendations to guests; and assisting guests in discovering the many authentic and unique experiences in Napa Valley and its five towns, working in concert with each Chamber of Commerce-operated Welcome Center within the Guest Information Network (GIN) — Calistoga, St. Helena, Yountville, and American Canyon

Tactics

01	Highlight and support tourism partner businesses with qualified referrals, reservations, and, often, same-day bookings to address occupancy and visitation
02	Continue to offer highly trafficked partner pop-up events, allowing increased visibility for our partner businesses, engaging visitors and residents in an unexpected and exciting way, and optimizing partner referrals
03	Collaborate with industry and local town partners to execute Ambassador Days designed to inspire and inform Welcome Center staff with news and information about valley-wide offerings and activities at partner businesses
04	Educate and inspire residents and visitors to support and engage in wellness experiences and destination stewardship



TARGET AUDIENCES

Visitors

Residents

Partners

Community Leaders

KEY FEATURES & BENEFITS OF THE NAPA VALLEY WELCOME CENTER

- High-touch, high-tech facility featuring personalized service and a digital user experience with an impressive 16’x9’ digital billboard with rotating promotional visuals about Napa Valley experiences and tourism businesses
- High-profile brand visibility
- Full-time knowledgeable, professional staff
- Timely and relevant materials and resources for guests, featuring current events, experiences, and options, including wellness and destination stewardship travel guidance and resources
- Best-in-class mercantile featuring unique, curated gift items, including locally-crafted, locally-sourced goods
- Collaboration and cohesive messaging shared throughout the entire Guest Information Network (GIN)

Community & Industry Relations

Strategy

Through proactive community outreach and engagement, Visit Napa Valley will strengthen resident and stakeholder support for the region's lodging and tourism industries while inspiring, educating, and empowering Napa Valley's hospitality community to be leaders in destination stewardship



Tactics

01 Advance destination stewardship strategic planning by finalizing the Destination Stewardship Action Plan as part of development of Visit Napa Valley Long Range Plan FY27–29. Deepen community partnership to implement sustainability and stewardship programs.

02 Expand workforce development initiatives to strengthen Napa Valley's position as a leading destination for careers in hospitality and tourism while completing strategic planning for the Crush That Career initiative

03 Strengthen the hospitality and tourism sector's presence in community and policy discussions to ensure its interests are represented in decision-making processes

04 Expand Visit Napa Valley's role in advocacy and thought leadership, with increased efforts at the local, state, and national levels as well as strategic speaking engagements. Maintain active collaboration with community, state, and global agencies and partner organizations to ensure the Napa Valley continues to benefit from and contribute to key tourism programs, policy development, and resources.

Industry Collaboration & Engagement

TOURISM ASSOCIATIONS

United States Travel Association
Destinations International
Visit California
California Travel Association
San Francisco Travel Association
Global Business Travel Association
Great Wine Capitals Global Network

LOCAL WINE-AFFILIATED ORGANIZATIONS

Napa Valley Vintners
Napa County Farm Bureau
Napa Valley Grape Growers
Winegrowers of Napa County

ENVIRONMENTAL SUSTAINABILITY ORGANIZATIONS

Napa Green
California Green Business Network
Napa Climate Action Committee
Napa Recycling & Waste
Upper Valley Waste Disposal
Recology

LOCAL GOVERNMENT

Napa County
American Canyon
City of Napa
Town of Yountville
St. Helena
Calistoga

CHAMBERS AND BUSINESS IMPROVEMENT DISTRICTS

Local Chambers of Commerce within Napa County (American Canyon, City of Napa, Yountville, St. Helena, Calistoga, Lake Berryessa, Napa Valley Hispanic Chamber of Commerce)
Downtown Napa Association
Napa Valley Vine Trail
Leadership Napa Valley
Napa Valley Transportation Authority (NVTA)
Workforce Alliance of the North Bay

COMMUNITY RELATIONS ORGANIZATIONS

Community Organizations Active Disaster (COAD)
Napa Hospitality Industry Partnership (Napa HIP)
Montalcino Sister City Program

Metrics & Measurement

Consistency in amplifying the brand message with target audiences to strengthen consumer awareness, consideration, and intent to travel to Napa Valley

Measuring Success on All Initiatives

BENCHMARKING

Regular and routine evaluation to determine day-to-day effectiveness and optimizations

EVALUATING & ANALYZING

Synthesizing data and research to share thought-leadership and perspective with stakeholders:

- Smith Travel Research (STR) for hotel occupancy/revenue
- Cvent for group/incentive lead sourcing
- Tourism Economics/Symphony for real-time visitor data based on geolocation, spend, and event activity
- Visitor Profile and Economic Impact Study
- Establish industry standards and optimizations

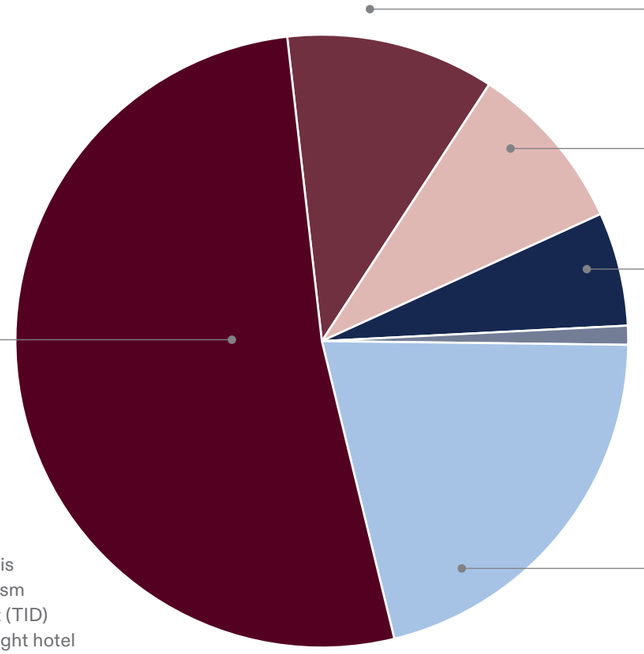
REPORTING

Tracking against SMART Key Performance Indicators:

- Specific
- Measurable
- Achievable
- Relevant
- Time-Sensitive

Visit Napa Valley FY27 Budget

ALLOCATION OF REVENUE FY27 $9.5M



$9 million in revenue is generated from Tourism Improvement District (TID) assessment of overnight hotel guests, with restricted usage per Management District Plan (MDP)



Appendix





FY27 Visit Napa Valley Board of Directors & Executive Committee

VISIT NAPA VALLEY BOARD OF DIRECTORS

EDWARD COSTA
Carneros Resort & Spa

TOM DAVIES
V. Sattui Winery

NATHAN DAVIS
Napa Valley Wine Train

PATRICK EGAN
Boisset Collection

DAVE ELCON
Solage, Auberge Collection

LINSEY GALLAGHER
Visit Napa Valley

JERI HANSEN
Napa Chamber of Commerce

TODD HUMPHRIES
Kitchen Door

RICK KAUFMAN
Harvest Inn

HEIDI MIERSMANN
Alila Napa Valley

PATRICK NAYROLLES
Meadowood Napa Valley

ALAIN NEGUELOUA
Bardessono & Hotel Yountville

JASON SCOGGINS
Latitude 38 Entertainment

DAVID SHIPMAN
White House Napa

EMMA SWAIN
St. Supéry Estate Vineyards & Winery

JENNY TOOMER
River Terrace Inn

RACHEL WILSON
Napa Valley Marriott Hotel & Spa

EXECUTIVE COMMITTEE

Chair
PATRICK NAYROLLES
Meadowood Napa Valley

Chair Elect
RICK KAUFMAN
Harvest Inn

Vice Chair
RACHEL WILSON
Napa Valley Marriott Hotel & Spa

Secretary-Treasurer
DAVID SHIPMAN
White House Napa

Past Chair
EDWARD COSTA
Carneros Resort & Spa

FY27 Napa Valley Tourism Corporation Board of Directors

American Canyon

DAVID ORO
City Council Member
Jurisdiction Representative

ERIK BURROW
DoubleTree by Hilton Napa Valley
Lodging Representative

City of Napa

STEVE POTTER
City Manager
Jurisdiction Representative

SARA BROOKS
Napa River Inn
Lodging Representative

JENNY TOOMER
River Terrace Inn
Lodging Representative

Yountville

ROBIN MCKEE
Town Council Member
Jurisdiction Representative

MAX COMPAGNON
Napa Valley Lodge
Lodging Representative

St. Helena

ANDREW BRADLEY
City Clerk & Public Information Officer
Jurisdiction Representative

RICK KAUFMAN
Harvest Inn
Lodging Representative

Calistoga

ERIC REICHERT
Chamber of Commerce
Jurisdiction Representative

DAVE ELCON
Solage, Auberge Collection
Lodging Representative

County of Napa

ANNE COTTRELL
Supervisor
Jurisdiction Representative

GEORGE GOEGGEL
Auberge du Soleil
Lodging Representative

EDWARD COSTA
Carneros Resort & Spa
Visit Napa Valley Representative



Founders' Circle & Premium Partners

ATTRACTIONS, SHOPPING, ACTIVITIES, AND SERVICES

Beau Wine Tours & Charter Services
California Wine Tours and Transportation
Finesse, The Store
Historic Napa Mill
Master Wine Tours
Napa Fragrance
Napa Valley Aloft Balloon Rides
Napa Valley Car Club
Napa Valley Wine Country Tours
Napa Valley Wine Train
Pure Luxury Transportation
The Culinary Institute of America at Greystone

LODGING

Alila Napa Valley
Andaz Napa
Archer Hotel
Auberge du Soleil
Bardessono Hotel & Spa
Carneros Resort and Spa
Casa Mani Resort Napa Valley
Dr. Wilkinson's Backyard Resort & Mineral Springs
Four Seasons Resort and Residences Napa Valley
Harvest Inn
Meadowood Napa Valley
Mount View Hotel & Spa
Napa River Inn
Napa Valley Marriott Hotel and Spa
River Terrace Inn
SENZA Hotel
Silverado Resort
Southbridge Napa Valley
The Ink House
The Meritage Resort and Spa
The Westin Verasa Napa

RESTAURANTS

Ad Hoc
Addendum
ALBA Bar + Café at River Terrace Inn
Bouchon Bakery
Bouchon Bistro
Burgers & Half Bottles
La Toque
Oakville Grocery
RO Restaurant & Lounge

WINERIES

Alpha Omega Winery
Beaulieu Vineyard
Beringer Vineyards
Bread & Butter Wines
Cakebread Cellars
CHANDON
Chimney Rock Winery
Clif Family Winery
Elizabeth Spencer Winery
Etude
Flora Springs Downtown Napa
Flora Springs Tasting Room
Frank Family Vineyards
HALL Wines
Hess Persson Estates
Hestan Vineyards
Inglenook
JCB St. Helena
John Anthony Vineyards
Joseph Phelps Vineyards
Louis M. Martini Winery
Oakville Wine Merchant
Opus One Winery
Orin Swift
Pahlmeyer Winery
Raymond Vineyards
Robert Mondavi Winery
Rombauer Vineyards
Rutherford Hill Winery
St. Supéry Estate Vineyards & Winery
Stags' Leap Winery
Sterling Vineyards
V. Sattui Winery

FAQs

What is Visit Napa Valley? What is its mission?

Visit Napa Valley is the official destination marketing and management organization for Napa County. Our mission is to promote, protect, and enhance the Napa Valley destination. Visit Napa Valley's programs target consumers to build overnight stays with an emphasis on non-peak time periods, including November–April (Cabernet Season) and mid-week, Sunday–Thursday nights. Our region encompasses the entire Napa County, and we work closely with each of the six local jurisdictions (Calistoga, St. Helena, Yountville, City of Napa, American Canyon, and Unincorporated Napa County).

How is Visit Napa Valley funded?

Visit Napa Valley is primarily funded through the Napa Valley Tourism Improvement District (TID), which is a 2% self-assessment by lodging properties paid by overnight visitors on lodging room nights. A minor amount of additional funding is derived through memberships paid by visitor-serving businesses and other partner organizations, as well as revenue generated in the Napa Valley Welcome Center Mercantile. Visit Napa Valley is a 501(c) (6) not-for-profit organization.

What is the difference between the Transient Occupancy Tax (TOT) and the Napa Valley Tourism Improvement District (TID)?

Each jurisdiction in Napa County levies a 12% Transient Occupancy Tax (TOT) on visitor stays at lodging properties. This tax revenue goes into the jurisdiction's respective General Fund budget. These funds, used at the discretion of local elected governments, pay for important municipal services such as police, fire, parks and recreation programs, roads, sidewalks, and other infrastructure. Each jurisdiction collects an additional 2% Tourism Improvement District (TID) assessment on visitor stays at lodging properties within their jurisdiction. With oversight by the Napa Valley Tourism Corporation (NVTC) and the Visit Napa Valley Board of Directors, 75% of this TID assessment funds Visit Napa Valley's efforts in elevating and promoting the entire Napa Valley as the world's premier wine-country experience. The local jurisdictions retain the remaining 25% of this TID revenue for local marketing efforts (events, local social media, etc.) with oversight by local TID advisory committees and the NVTC Board. Since 2019, an additional 1% TOT has been collected from visitors on overnight hotel stays to support local affordable workforce housing solutions. This additional tax base is collected in all of the jurisdictions with the exception of American Canyon. In 2025, $68 million in TOT revenue was generated for local jurisdictions, and $8.5 million in TID funds was collected for Visit Napa Valley's destination marketing programs.

Wouldn't the money from the NVTID be better used to fund other local government priorities?

The NVTID funds are self-assessed private funds collected from overnight lodging guests, restricted to be used specifically for tourism marketing and enhancement. The NVTID funds cannot be leveraged by local government for initiatives or projects. There is a symbiotic relationship between the two funding sources, creating an economic ecosystem. Visit Napa Valley invests the TID funds in strategically managed programs. Investment in destination marketing and promotion by Visit Napa Valley ensures that jurisdiction TOT funds continue growing to support local community improvements and services.

What is the Visit Napa Valley budget?

For FY27, the Visit Napa Valley operating budget is $9.5 million, including TID revenue, as well as partnership, mercantile, and other revenue sources. This is lower than many other world-class destination marketing budgets. These funds are used to maintain Napa Valley's globally competitive position, which in turn generates significant economic benefits for each jurisdiction, supporting businesses and our workforce in addition to local municipal services.

Napa Valley has a strong global reputation — how can continued investment in marketing help us maintain that position and stay competitive?

Ongoing investment in Napa Valley destination promotion is critical to ensure that Napa Valley and its residents continue to reap the benefits of a strong, vibrant, and strategically managed tourism economy and the enhanced quality of life for residents that results from the robust economy. With a projected 10% increase (~540 rooms) in Napa Valley lodging inventory expected to come on line by the end of 2027, strategically investing in destination marketing programs that drive demand is even more vital.

As our region continues to attract visitors and grow, how can we balance the needs of residents, businesses, and visitors when addressing traffic and crowding?

Visit Napa Valley's strategic promotion of the destination aims to attract visitors during the off-peak season and shift trips during peak season to low-occupancy periods. Visit Napa Valley works closely with multiple agencies to support traffic reduction with shuttle buses, public transit solutions for employees, and alternative transportation modes to reduce traffic impacts. Visit Napa Valley and lodging partners continue to invest in building the Napa Valley Vine Trail, a pedestrian and bike path spanning the entire length of Napa Valley. Visitors to Napa Valley generate tax revenues that allow local governments to mitigate traffic pressures with investments in our community's infrastructure and public safety. A low unemployment rate, coupled with a tight housing market, adds to traffic during worker commute times. Some workers from surrounding regions make their way to Napa Valley jobs in all employment sectors.

What is the range of job types that the tourism industry supports, and how do wages and career paths vary across those roles?

Napa Valley's tourism industry is a leading employer and offers flexible, diverse, and rewarding job opportunities for all skill levels and backgrounds. The tourism industry supports an estimated 15,000 jobs in the community (Source: 2025 Economic Impact Study by Tourism Economics). The majority of lodging jobs in Napa Valley offer benefit packages and retirement plans to be competitive and retain top talent. The tourism industry offers career ladders for entry level employees similar to other industries. The local tourism industry partners with the community college to provide hospitality training for employment advancement in the industry.

How are tourism strategies being designed to ensure that local communities see meaningful benefits?

Tourism provides economic, cultural, and civic benefits that improve the quality of life for all residents in Napa Valley. Visitors to Napa County spent $2.2 billion in 2025, which equated to approximately $17,000 per resident. Additionally, the tourism industry accounts for 15,000 local jobs and generated $162.5 million in tax revenue for local government in Napa County. Tourism revenues allow local government to invest in services and programs that benefit all residents, including infrastructure improvements, civic amenities, and public safety. Napa Valley's reputation as a premier tourist destination creates demand for a diverse range of goods, services, and cultural programs that are available for residents and visitors to enjoy. Lodging property owners make significant investments in their properties to ensure they are in line with Napa Valley's world-class reputation. These investments result in increased property tax and TOT revenues for local projects that directly benefit residents. Napa Valley's strong brand identity makes it an attractive place for an array of companies to locate to, including technology and manufacturing, resulting in quality employment opportunities for residents.

What role does the tourism industry play in helping address the affordable housing challenges in Napa Valley?

The tourism industry generated more than $162.5 million in local tax revenue in 2025 to fund essential services and programs throughout Napa County. Local elected leaders decide how much of those funds are used for affordable housing and other critical services. Working closely with local government, the lodging industry supported the passage of a 1% addition to the TOT, specifically designated for workforce and affordable housing. Since the inception of this tax in 2019, approximately $5 million is collected annually to support workforce housing solutions in Napa County, totaling nearly $30 million to date.

Beyond economic impact, how does tourism contribute to the well-being and vitality of our community?

The tourism industry pledged $2.5 million to support the Napa Valley Vine Trail, a 47-mile-long walking and biking trail system that will benefit both residents and visitors. An industry-wide volunteer opportunity has been incorporated into National Travel & Tourism Week with our Tourism Gives Back initiative. Tourism workers throughout the county support a local service project in an organized work party for maximum impact. Lodging businesses regularly support more than 80 local nonprofits through direct contributions, room-night donations, and volunteer service time.

If tourism in Napa Valley is already strong, why is there still a focus on increasing visitor spending and overnight stays?

Visit Napa Valley's objective is to increase tourism-related revenue through increased visitor spending and overnight stays in low-occupancy periods. Napa Valley welcomed 3.8 million visitors in 2025, up 1.5% from last year. Total economic impact reached $2.8 billion, a 2.9% increase year-over-year. Visitors spent an average of $6 million per day, and overnight visitors drove 90% of all spending, despite making up just 38% of total visitor volume. Visitors were 59% male and 41% female. (Source: 2025 Visitor Profile Study by SMARI and Economic Impact Study by Tourism Economics).

How are tourism development projects in Napa Valley being managed to protect the region's natural beauty and character while still supporting the local economy?

Responsible and sustainable growth and expansion are vital to the ongoing success of our community in Napa Valley. Lodging can only be developed where zoning allows it and will not encroach into open spaces and protected areas. Lodging properties generated more than $68 million in TOT revenue in 2025. TOT Special Projects Funds are allocated by Napa County to preserve and protect natural landscapes through parks and open spaces, as well as cultural arts programs and affordable housing.

How do I keep up to date on what Visit Napa Valley is doing?

Visit Napa Valley is governed by two boards of directors — the Napa Valley Tourism Corporation Board and the Visit Napa Valley Board. With oversight from both boards, as well as annual business audits that are consistently rated best-in-class year after year, Visit Napa Valley continues to offer transparency and visibility into activities and operations. Visit Napa Valley proactively reports on its activities on the Visit Napa Valley Industry site. Bookmark www.VisitNapaValley.com/industry. You can find information on Visit Napa Valley's vision, mission, and objectives; the hospitality industry's economic impact and Visit Napa Valley's reach; reports (Monthly Activity Report, Annual Recaps, STR Monthly Reports, and Campaign Recaps); toolkits to aid the local industry during crises (COVID-19 Toolkit and Wildfire Toolkit); and other resources, such as our brand guidelines. Additionally, follow Visit Napa Valley on Instagram, Facebook, X, TikTok, Pinterest, and LinkedIn @VisitNapaValley.

Connect with Visit Napa Valley

DEPARTMENT		CONTACT
PARTNERSHIP	• Understand your partner benefits • Access the partner portal • Schedule a partner site visit • Access our latest reports • Download helpful resources and tools	partnership@visitnapavalley.com
MARKETING & COMMUNICATIONS	• Share news, news releases, or new programs • Connect on organic content on website, blog, newsletter, and social channels • Learn more about our media campaigns	marketing@visitnapavalley.com
GUEST EXPERIENCE	• Share last-minute, day-of reservations • Participate in a Partner Pop-Up event in the Napa Valley Welcome Center	concierge@visitnapavalley.com
SALES & BUSINESS DEVELOPMENT	• Share a great space to host groups • Share experiences that appeal to the leisure traveler • Learn more about trade show opportunities	sales@visitnapavalley.com
DATA & RESEARCH	• Understand visitor trends • Find the most current occupancy data • Share questions about the 2025 Economic Impact Report • Receive useful visitor data specific to your business	research@visitnapavalley.com
COMMUNITY & INDUSTRY RELATIONS	• Understand tourism economy • Advocate on behalf of hospitality and tourism industry	communityrelations@visitnapavalley.com
MEDIA	• Connect with Visit Napa Valley on media leads	media@visitnapavalley.com



VISIT Napa Valley®

FISCAL YEAR 2027 ANNUAL PLAN

1001 Second Street
Suite 330
Napa, CA 94559
(707) 226-5813

© 2026 Visit Napa Valley