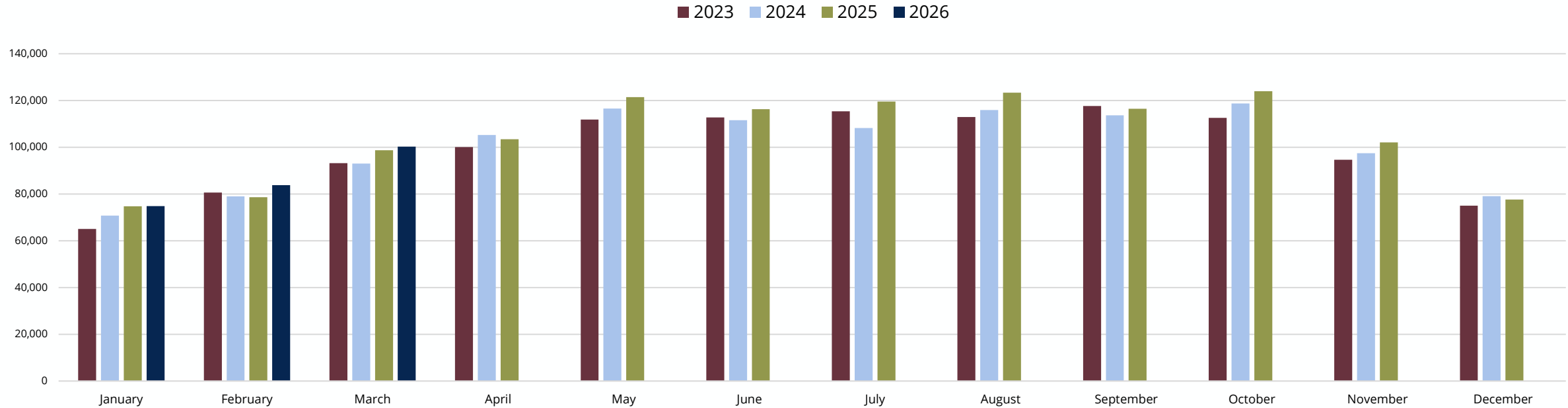


# NAPA VALLEY LODGING DEMAND BY MONTH



Jan-Mar 2026 YTD	Occupancy	ADR	RevPAR	Revenue	Supply	Demand
2026	54.4%	\$340.88	\$185.43	\$88,031,204	474,753	258,248
2025	53.4%	\$322.24	\$177.53	\$83,842,456	472,261	252,355
YOY % change/2025	+1.8%	+2.6%	+4.4%	+5.0%	+0.5%	+2.3%

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

# LODGING: MARCH 2026



COMPETITIVE REGIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
<b>Napa County</b>	<b>61.3%</b>	<b>+1.2%</b>	<b>\$363.79</b>	<b>+4.9%</b>	<b>\$223.07</b>	<b>+6.2%</b>
Sonoma County	60.6%	+9.5%	\$183.42	+0.4%	\$111.10	+10.0%
Monterey County	72.1%	+11.5%	\$238.45	+5.2%	\$172.01	+17.2%
San Luis Obispo County	68.0%	+12.2%	\$171.46	+3.8%	\$116.68	+16.5%
Santa Barbara County	71.0%	+12.5%	\$234.62	+10.2%	\$166.59	+24.0%
San Francisco County	73.8%	+14.4%	\$296.50	+26.2%	\$218.68	+44.5%

JURISDICTIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
American Canyon	76.6%	+15.0%	\$121.78	-4.0%	\$93.24	+10.4%
Napa (City of)	62.6%	-1.8%	\$303.60	+3.2%	\$190.12	+1.4%
Yountville	50.0%	+4.1%	\$614.99	+3.0%	\$307.20	+7.3%
St. Helena	65.7%	-2.6%	\$489.08	+0.8%	\$321.56	-1.8%
Calistoga	59.0%	+1.7%	\$517.31	+10.7%	\$305.21	+12.5%
Unincorporated Co.	57.2%	+2.1%	\$506.85	+11.6%	\$290.16	+13.9%

SERVICE TYPE	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
VNV Luxury	57.3%	+10.3%	\$853.10	+7.5%	\$488.53	+18.6%
VNV Limited-Service	67.1%	+0.7%	\$160.85	-1.9%	\$107.88	-1.3%
VNV Group	63.7%	-1.9%	\$270.16	+0.7%	\$171.98	-1.2%

## Takeaways:

Growth across all metrics. Coastal markets saw stronger increases, possibly related to the March heatwave.

American Canyon had both the strongest occupancy and growth. St. Helena saw the second-highest occupancy; Yountville the second-highest growth.

Luxury continues to perform well, seeing increases across the board.

# LODGING: YTD-MARCH 2026



COMPETITIVE REGIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
<b>Napa County</b>	<b>54.4%</b>	<b>+1.8%</b>	<b>\$340.88</b>	<b>+2.6%</b>	<b>\$185.43</b>	<b>+4.4%</b>
Sonoma County	54.4%	+7.0%	\$173.75	-0.4%	\$94.45	+6.6%
Monterey County	63.6%	+6.4%	\$230.30	+5.0%	\$146.56	+11.8%
San Luis Obispo County	60.6%	+5.4%	\$163.34	+2.7%	\$99.03	+8.3%
Santa Barbara County	63.5%	+4.0%	\$223.26	+5.6%	\$141.69	+9.8%
San Francisco County	68.6%	+13.8%	\$335.09	+18.0%	\$229.79	+34.2%

JURISDICTIONS	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
American Canyon	67.5%	+10.7%	\$115.79	-3.9%	\$78.18	+6.4%
Napa (City of)	55.9%	-1.4%	\$281.84	+1.4%	\$157.60	-0.1%
Yountville	43.6%	+7.8%	\$589.79	+0.8%	\$256.95	+8.7%
St. Helena	60.1%	-1.3%	\$446.40	-2.8%	\$268.39	-4.1%
Calistoga	52.2%	-0.4%	\$505.87	+9.8%	\$264.04	+9.3%
Unincorporated Co.	48.9%	+9.0%	\$464.62	+1.8%	\$227.19	+11.0%

SERVICE TYPE	Occupancy	YOY %	ADR	YOY %	RevPAR	YOY %
VNV Luxury	48.3%	+8.7%	\$804.31	+3.6%	\$388.44	+12.5%
VNV Limited-Service	59.8%	-0.6%	\$155.12	-1.8%	\$92.79	-2.4%
VNV Group	56.5%	+0.8%	\$252.81	-0.2%	\$142.86	+0.6%

## Takeaways:

Napa and Sonoma occupancies are on par, while the central coast regions hover in the low 60s. As our gateway, San Francisco is seeing solid increases in all metrics.

American Canyon & St. Helena both have occupancy in the 60s, while Yountville & Unincorporated showed strong growth.

Luxury continues to perform well, with both increases in occupancy and ADR.