

VISIT NAPA VALLEY

2016 Visitor Profile Final Report of Findings

Research Prepared by
Destination Analysts, Inc.



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Research Overview

This report presents findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit Napa Valley. The data presented here comes from three sources:

- Napa Valley Lodging Guest Survey.
- Napa Valley Visitor Intercept Survey, which collected data from day-trip visitors, persons staying in hotels and other paid lodging vacation rentals (e.g., vacation rentals and AirBnB) and visiting friends or relatives staying overnight in private homes (VFRs).
- Telephone Survey of Napa Valley Homes conducted at the end of 2016 to quantify the number of VFRs who stayed overnight in a private home in the area. This survey was administered to 300 randomly selected homes in Napa Valley.

The data collected in these surveys was used to estimate the actual annual volume of lodging guests, visiting friends and relatives (VFRs), those staying in other paid lodging (vacation rentals, AirBnB, etc.) and day trip visitors to the Napa Valley. Using the visitor volume estimates that emerged from this process, the survey data was weighted to develop the overall visitor profile.



Research Objectives

The overarching goal of this survey-based research is to create an in-depth profile of the Napa Valley visitor, including developing the following marketing intelligence:

- Detailed trip characteristics (i.e. tripographic information like the reason for visiting Napa Valley, length of stay, place of stay, etc.)
- Activities & attractions visited in Napa Valley
- Evaluation of Napa Valley brand attributes
- Detailed Napa Valley visitor spending estimates
- Travel planning resources used by Napa Valley visitors
- Visitor expectations and satisfaction
- Visitor psychographic and demographic profiling

Methodology

The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with Visit Napa Valley, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to Napa Valley collected at locations around the area, and (2) a self-administered survey of Napa Valley hotel guests distributed at their hotel.

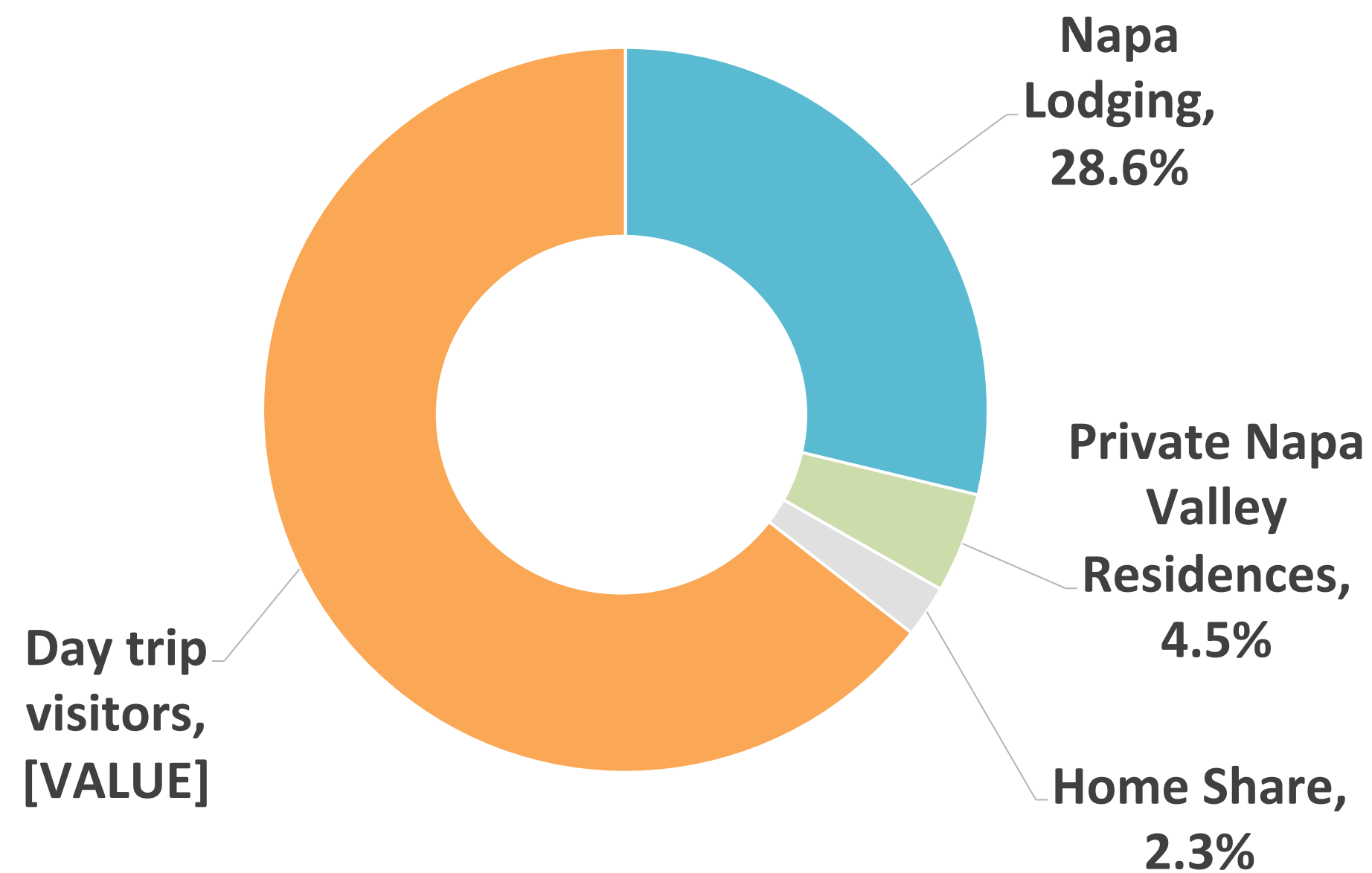
This report presents data collected throughout the 2016 calendar year, from both the Visitor Intercept Survey as well as the Hotel Guest Survey. In total, 1,353 completed surveys were collected from four different key groups of visitors:

1. Visitors staying in a hotel/lodging property in the Napa Valley area (Lodging guests)
2. Visitors staying in a Vacation home/room rental (Home share rental)
3. Visitors staying in the private home of a friend or relative in Napa Valley (VFRs)
4. Day-trippers to Napa Valley (regional residents coming to the area for the day as well as those on trips staying overnight elsewhere in the surrounding areas)

Visitor Volume, 2016

The results presented in this report are weighted based on estimated visitor volume to Napa during the year. The chart and table (below) show the number of visitors in each of the four segments that Napa Valley hosted in 2016. **In total, the Napa Valley hosted 3.5 million visitors in 2016, up from 3.3 million in 2014.**

Visitor Volume, 2016



	Visitors to Napa Valley, 2016
Napa Lodging	1,017,783
Private Napa Residences	157,954
Home Share Rentals	81,553
Day Trip Visitors	2,280,226
Total	3,537,516

Visitor Intercept Survey Overview



Throughout 2016, Destination Analysts' survey collection team worked at locations around the Napa Valley area to randomly select and interview visitors. This survey only collected data from two types of visitors: 1) Day trip visitors and 2) Visiting friends or relatives staying overnight in private Napa homes (VFRs). The following locations participated in this research:

- Beringer
- Castello di Amorosa
- The Culinary Institute of America at Greystone
- Hall Wines
- Napa Premium Outlets
- Napa Valley Wine Train
- Robert Mondavi Winery
- Sterling Vineyards
- Visit Napa Valley Welcome Center
- V Marketplace
- V. Sattui Winery

Lodging Guest Survey Overview

The self-administered printed Lodging Guest Survey was distributed at various lodging properties throughout Napa Valley in 2016. Guests were asked to complete the survey and drop it in the mail at their convenience (via pre-paid business reply postage). The following Napa Valley properties distributed the Lodging Guest Survey:

- Auberge du Soleil
- Bardessono
- Chateau de Vie
- Chelsea Garden Inn
- DoubleTree by Hilton Hotel & Spa
- Dr. Wilkinson's Hot Springs Resort
- Embassy Suites Napa Valley
- Fairfield Inn & Suites
- Four Sisters Inns - Napa
- Four Sisters Inns - Yountville
- Hawthorn Suites by Wyndham
- Holiday Inn Express
- McClelland-Priest B&B
- Napa River Inn
- Napa Winery Inn
- Roman Spa Hot Springs Resort
- Shady Oaks Country Inn
- Silverado Resort and Spa
- Southbridge Napa Valley
- The Bergson
- The Meritage Resort and Spa and Vino Bello
- The Westin Verasa Napa

Economic Impact of Visitation to Napa Valley

The tourism industry continues to provide a significant positive impact to Napa Valley's economy. This visitor profile development project conducted for Visit Napa Valley also included an economic impact analysis provided in a supplemental report. The table at right shows several key statistics emerging from that effort. The 3.5 million visitors to Napa Valley in 2016 generated spending in excess of \$1.9 billion. An estimated 13,437 jobs with a total payroll of \$387 million were supported by this injection of visitor spending to Napa Valley. In 2016, visitor spending also generated tax revenues in excess of \$80 million for governmental agencies in Napa Valley.

Tourism's Economic Impact, 2014 - 2016

	2012	2014	2016	% Change (2014-16)
Total visitors to Napa Valley:	2.94 million	3.3 million	3.5 million	6.3%
Total visitor spending in Napa Valley:	\$1.39 billion	\$1.63 billion	\$1.9 billion	17.5%
Jobs supported by Napa Valley visitor industry:	10,498	11,776	13,437	14.1%
Napa Valley visitor industry payroll:	\$300 million	\$332 million	\$387 million	16.4%
Taxes generated for govt. entities in Napa Valley:	\$51.7 million	\$64.2 million	\$80.4 million	25.2%

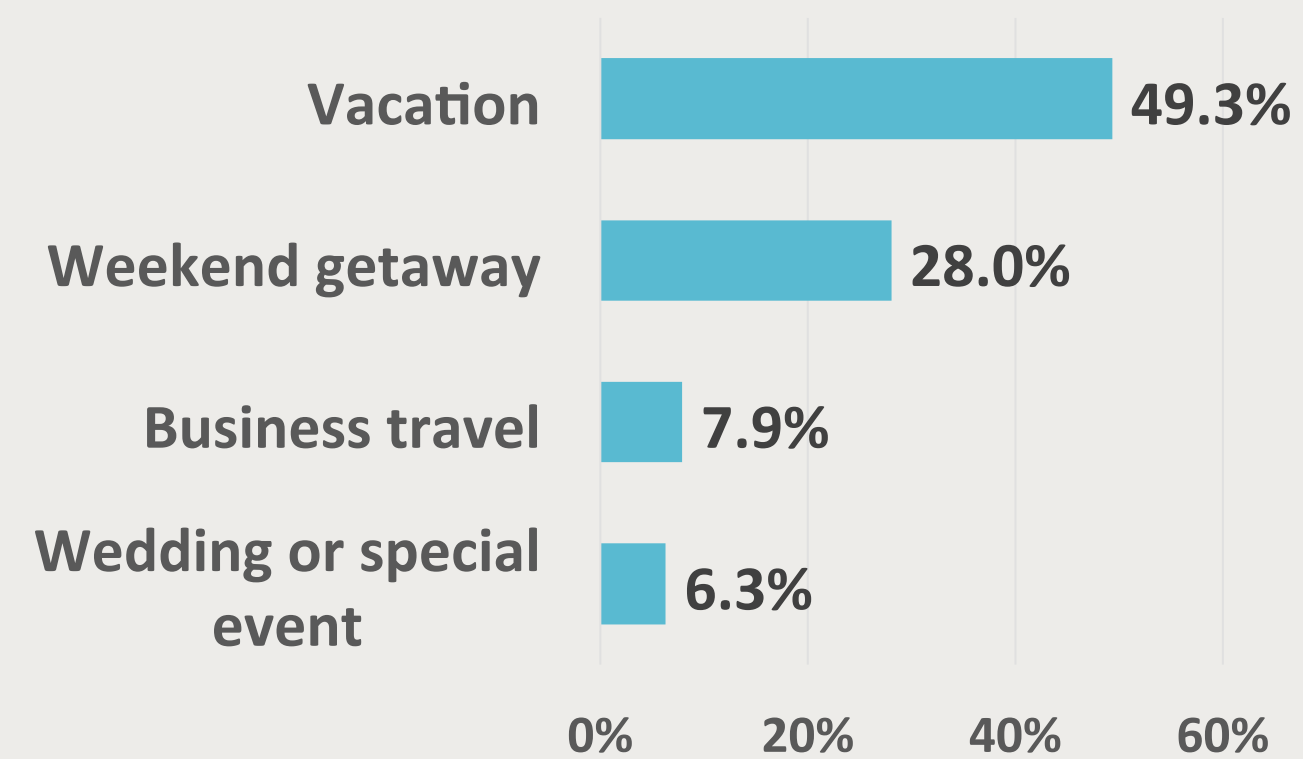
INFOGRAPHIC SUMMARY OF KEY FINDINGS

THE PAGES FOLLOWING SUMMARIZE KEY FINDINGS
ON ALL VISITORS SURVEYED

QUICK FACTS: 2016 NAPA VALLEY VISITOR PROFILE

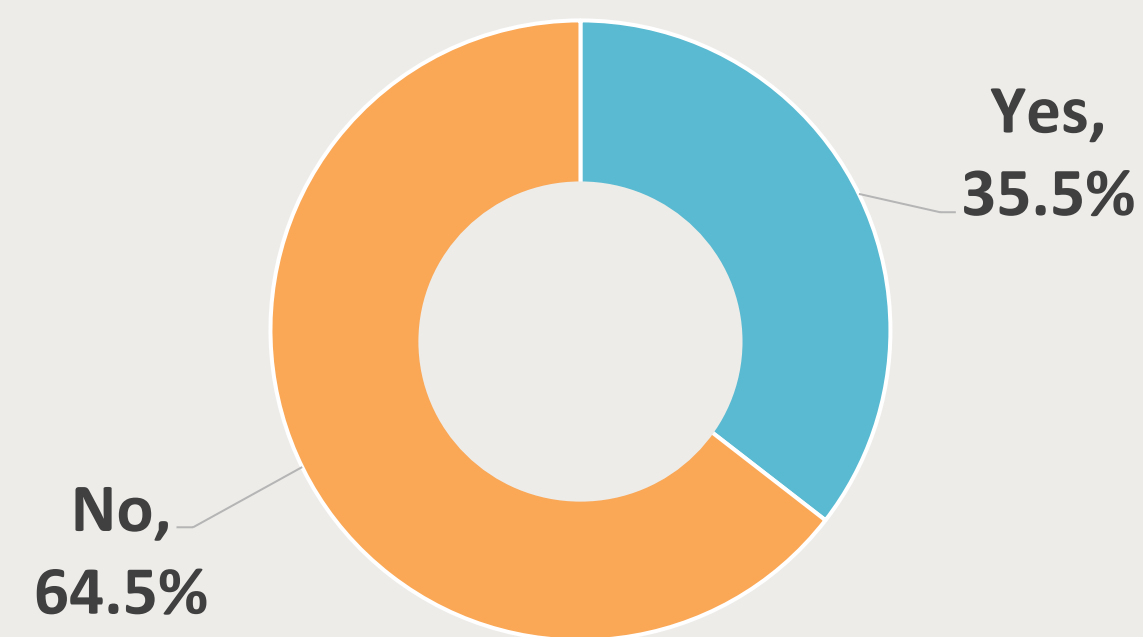
Top Reasons for Visiting

(See page 18 for full detail)



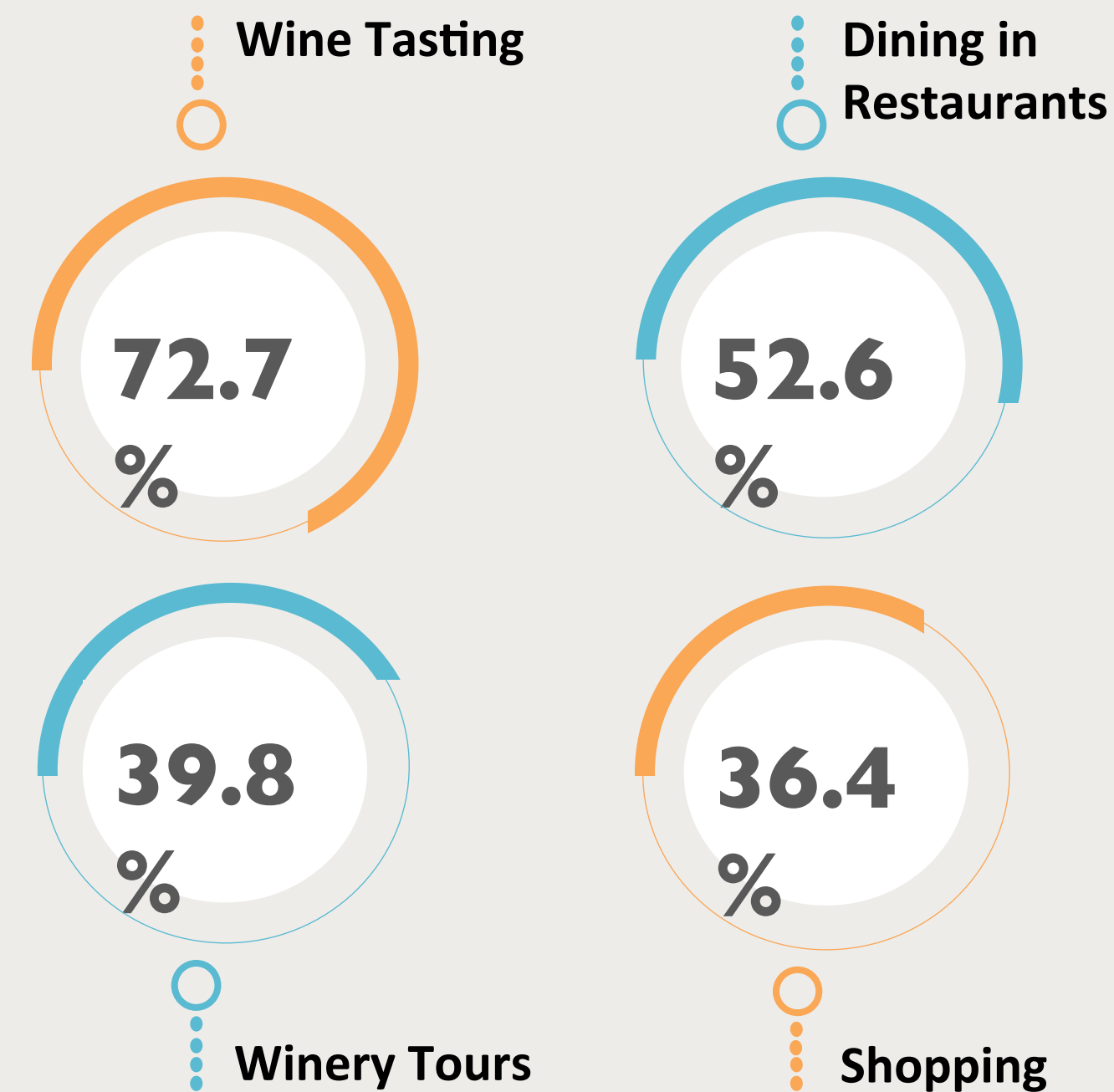
Overnight Stay in Napa Valley

(See page 18 for full detail)



Top Activities

(See page 25 for full detail)



Number of Wineries Visited

(See page 27 for full detail)



Key Trip Details

(See page 37 and 38 for full detail)



The average visitor spends **2.7 days** in the Napa Valley



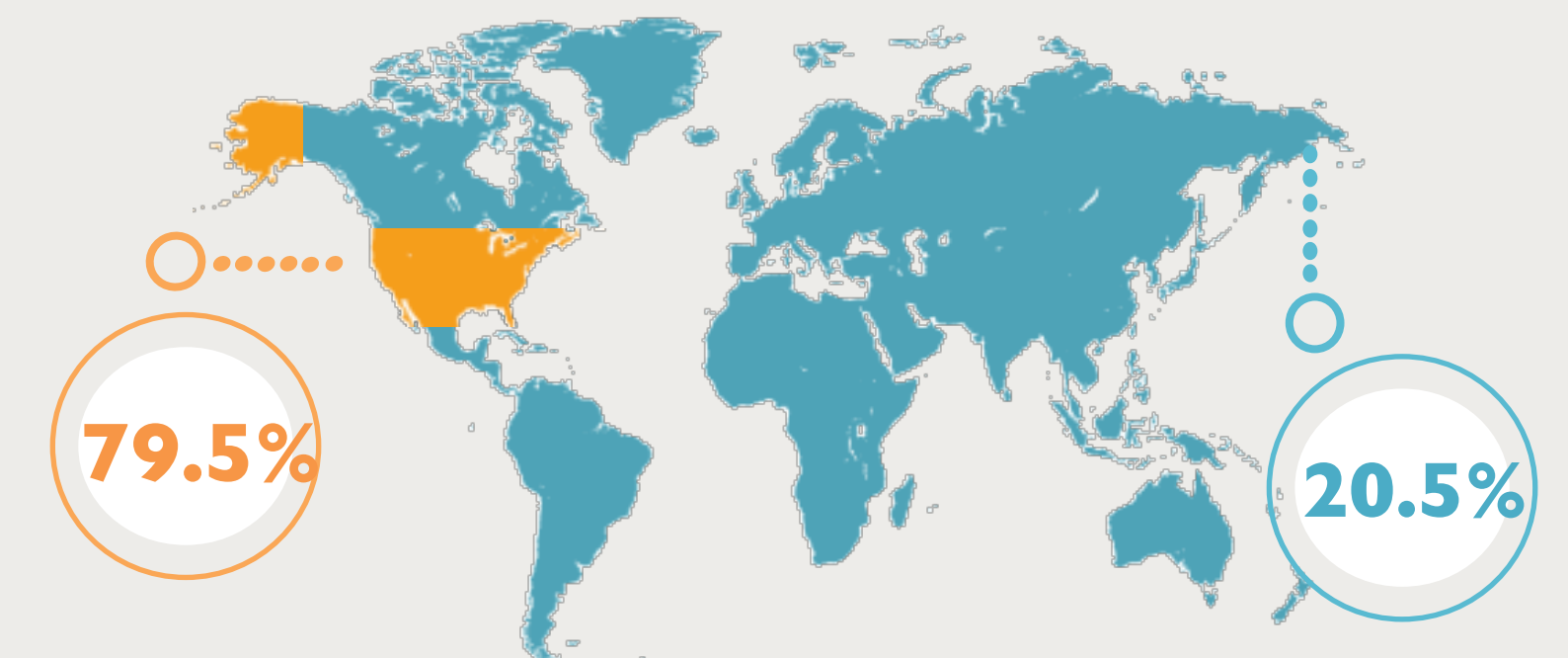
On average, visitors spend **\$547.72** in-market, per travel party, per day



The average visiting travel party consist of **4.0 people**

Domestic vs. International Visitors

(See page 54 for full detail)



INFOGRAPHIC SUMMARY OF KEY VISITOR GROUPS

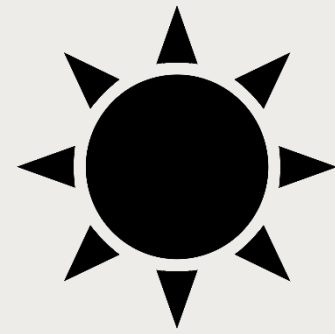
THE PAGES FOLLOWING SUMMARIZE KEY FINDINGS ON HOTEL GUEST,
REGIONAL LEISURE DAY TRIP AND NON-REGIONAL DAY TRIP VISITORS

Visitors who stayed overnight in a Napa Valley area hotel during their trip.



Hotel Stay Details

Mean hotel spend daily – \$265.43
Mean # of people in hotel room – 2.3



Days Spent in The Napa Valley

Days – 3.0



Wineries/Tasting Rooms Visited

3.5, on average



Average Spending In-Market

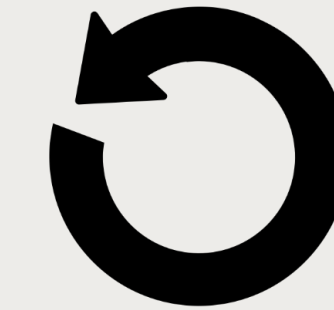
\$839.92 per travel party

Top Activities Participated In



- Dining in restaurants - 64.7%
- Wine tasting rooms at wineries - 55.3%
- Shopping - 39.1%
- Winery tours - 29.8%

Likelihood to Visit Again



Very likely - 68.9%
Likely - 25.4%

Key Demographics

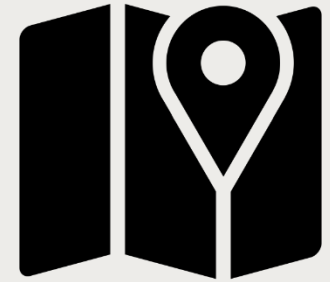
Annual household income – \$192,143

Marital Status: Married – 59.9%
Single – 31.4%



Average age – 49.8

Visitors who live within the surrounding region (San Francisco Bay Area) who came to Napa Valley on a day trip for purely leisure reasons.



Top Cities Visitor Made Day Trip From

- San Francisco - 35.9%
- Berkeley - 9.8%
- Oakland - 9.2%
- Sacramento - 6.5%



Travel Party Composition

- 4.1 people, on average
- 10.8% of travel parties had children



Wineries/Tasting Rooms Visited

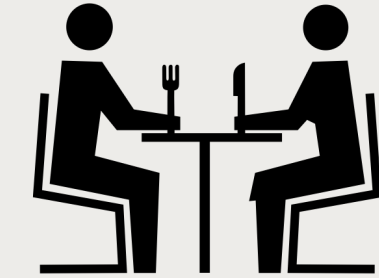
2.4, on average



Average Spending In-Market

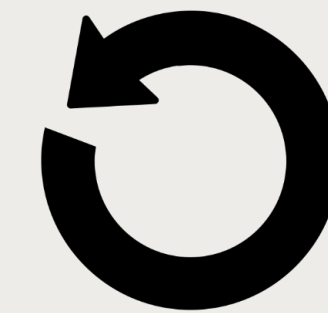
\$296.50

Top Activities Participated In



- Wine tasting rooms at wineries - 77.9%
- Winery tours – 46.3%
- Dining in restaurants - 40.5%
- Shopping - 29.5%

Likelihood to Visit Again



Very likely – 58.1%
Likely – 39.5%

Key Demographics

Annual household income – \$131,343

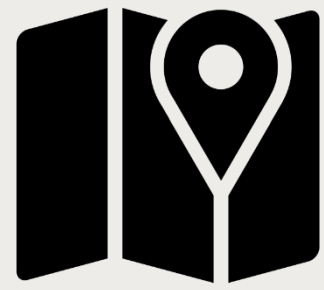
Marital Status: Married – 48.6%
Single – 48.1%



Average age – 38.0

THE NON-REGIONAL DAY TRIP VISITOR

Visitors who live outside the San Francisco Bay Area who came to Napa Valley on a day trip (ex: Los Angeles resident on a trip to SF making a day trip to Napa).



Top Cities: Visitor Made Day Trip From

- San Francisco - 53.6%
- Oakland - 8.9%
- Berkeley - 6.4%
- Sonoma - 3.0%

For example, 53.6% of these day trip visitors are travelers to San Francisco who visit Napa Valley as part of their trip.



Travel Party Composition

- 4.5 people, on average
- 12.9% of travel parties had children



Wineries/Tasting Rooms Visited

3.2, on average

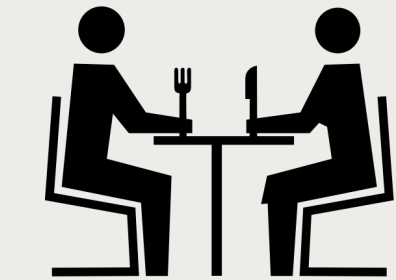


Average Spending In-Market

\$421.38

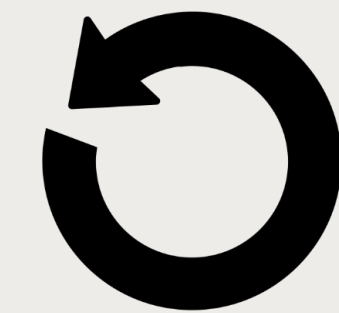
Top Activities Participated In

- Wine tasting rooms at wineries - 84.7%
- Dining in restaurants - 50.0%
- Winery tours - 41.1%
- Shopping - 37.9%



Likelihood to Visit Again

Very likely – 41.8%
Likely – 44.9%

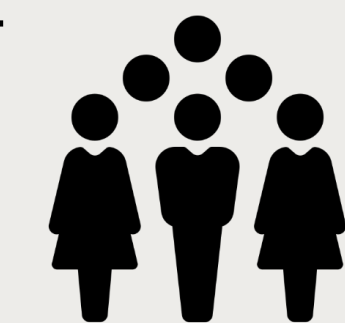


Key Demographics

Annual household income – \$163,834

Marital Status: Married – 62.6%
Single – 26.0%

Average age – 42.2



ABOUT THIS REPORT

In the remainder of this report, data from the survey findings is presented as follows:

Each slide in this report presents a chart illustrating the results for all visitors. For questions asked only in the Lodging Guest Survey or in the Visitor Intercept Survey, this is specified in the slide title.

The report additionally presents results for each of the four visitor segments:

- Lodging guests
- Home share rental visitors
- Visiting friends and relatives (VFRs)
- Day trip visitors.

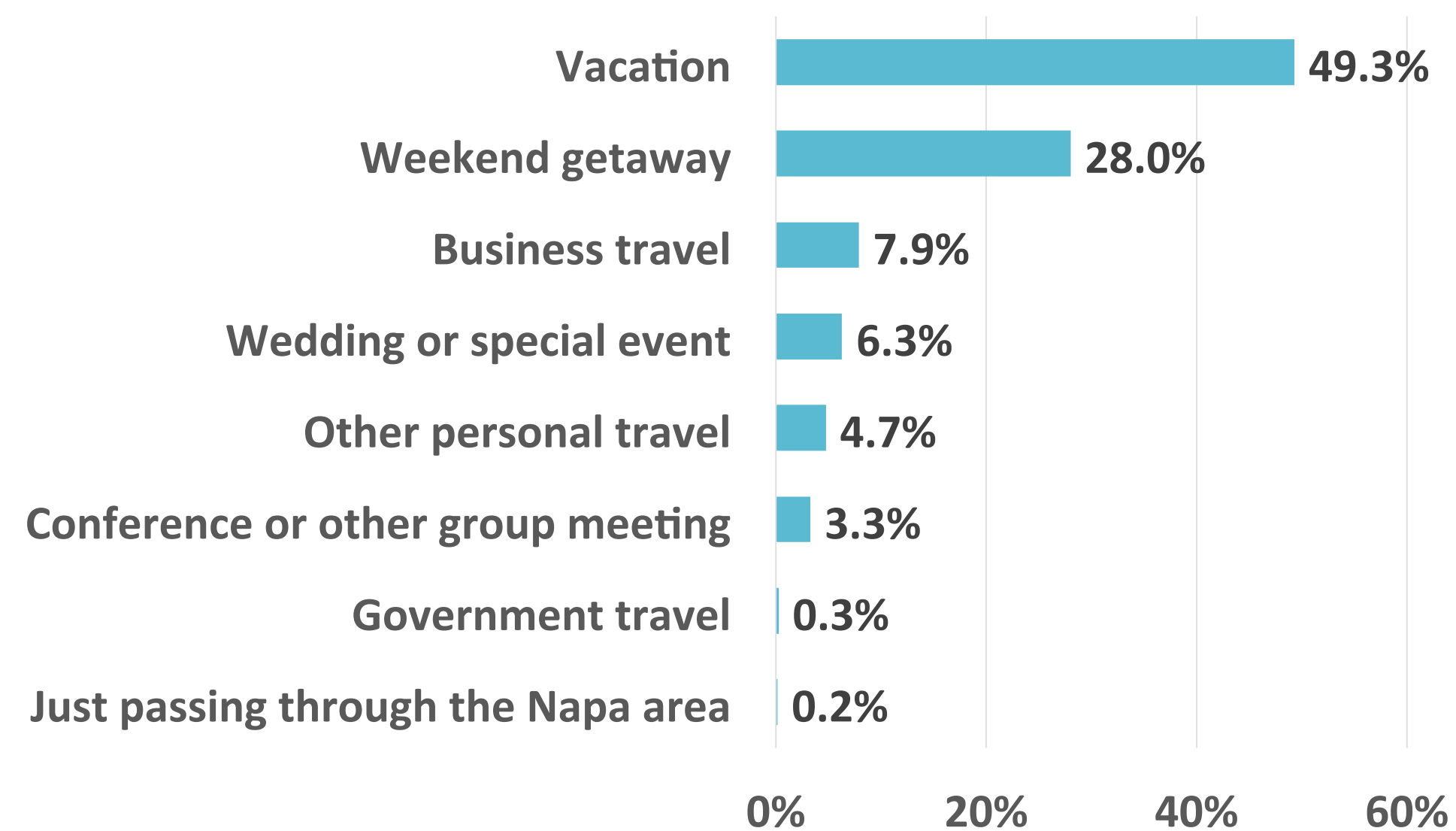
These results are presented in tabular format next to charts representing the data for all visitors.

DETAILED FINDINGS

Primary Reason for Napa Valley Trip

Approximately half of all visitors surveyed in 2016 were in the Napa Valley for a vacation (49.3%). Nearly 30 percent of respondents were in the Napa Valley on a weekend getaway (28.0%). Additionally, one-in-ten visitors surveyed were in the destination for business, group meeting or government travel (11.5%). In looking at differences by visitor type we see that lodging guests were more likely to be in the Napa Valley for business or conferences compared to the other visitor segments, while home share rental visitors were more likely to be in the destination for a wedding or special event.

Chart 1: Primary Reason for Napa Valley trip



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Vacation	38.6%	42.9%	45.6%	55.2%
Weekend getaway	30.4%	39.3%	38.2%	25.2%
Business travel	10.1%	3.6%	0.4%	7.1%
Wedding or special event	9.3%	14.3%	4.4%	4.7%
Other personal travel	4.3%	0.0%	4.4%	5.2%
Conference, incentive trip, corporate or other group meeting	5.8%	0.0%	0.0%	2.6%
Government travel	0.9%	0.0%	0.0%	0.0%
Just passing through the Napa area	0.3%	0.0%	0.0%	0.0%
Sample size:	345	28	68	424

Base: Respondents who are not Bay Area residents on a day trip to Napa. 865 responses (weighted).

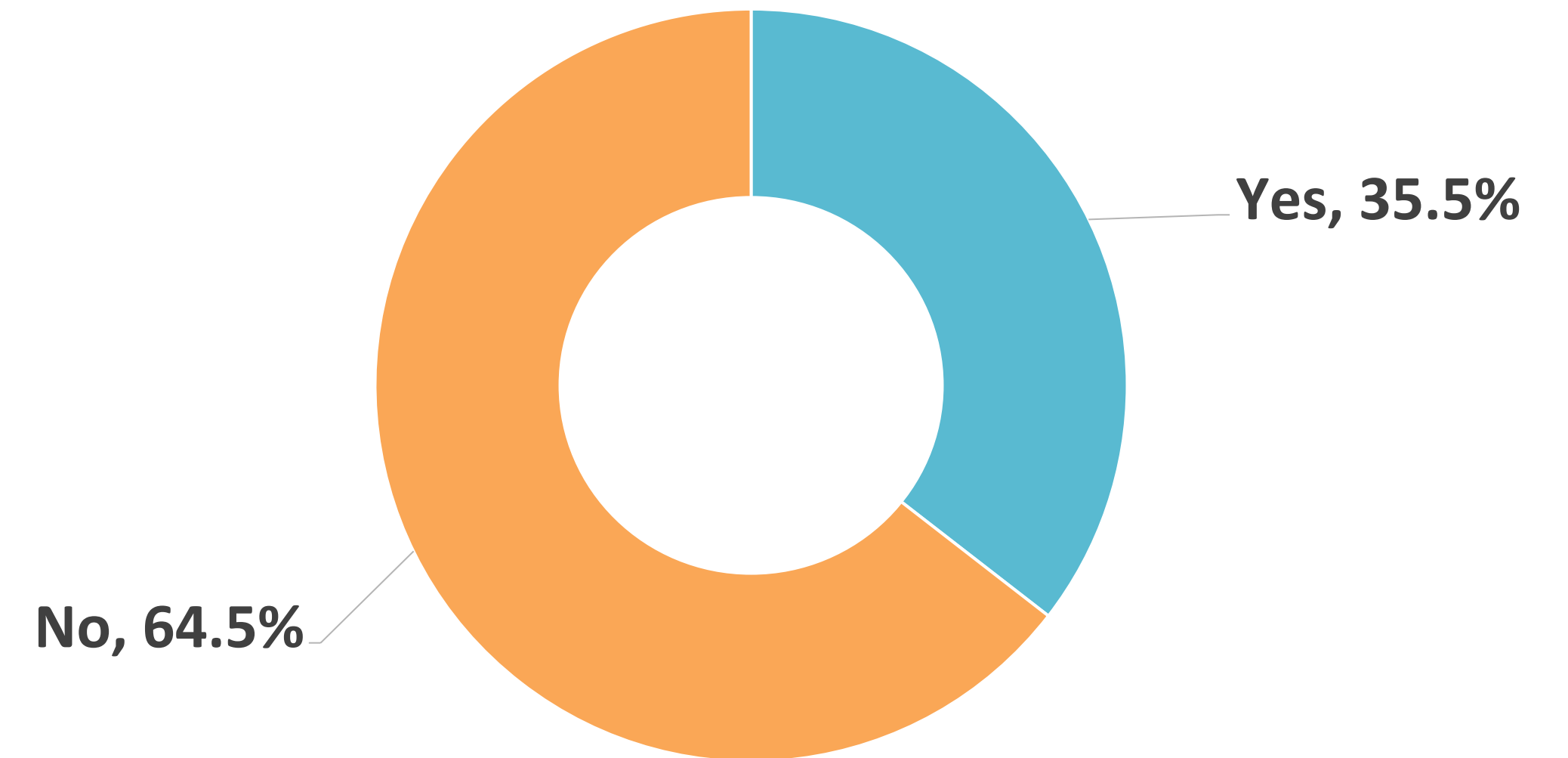
Question: Which best describes the trip you are currently on? (Surveyor categorize as appropriate)

Overnight Stay in Napa Valley

One-third of visitors surveyed in 2016 stayed overnight in the Napa Valley during their visit. In total, 35.5 percent of all respondents stayed overnight in the Napa Valley during their trip while the remaining 64.5 percent were on a day trip to the destination.

Question: Are you staying overnight anywhere in the Napa Valley on this visit? Base: Respondents who are not Bay Area residents on a day trip to Napa. 1,352 responses (weighted).

Chart 2: Overnight Stay in Napa Valley

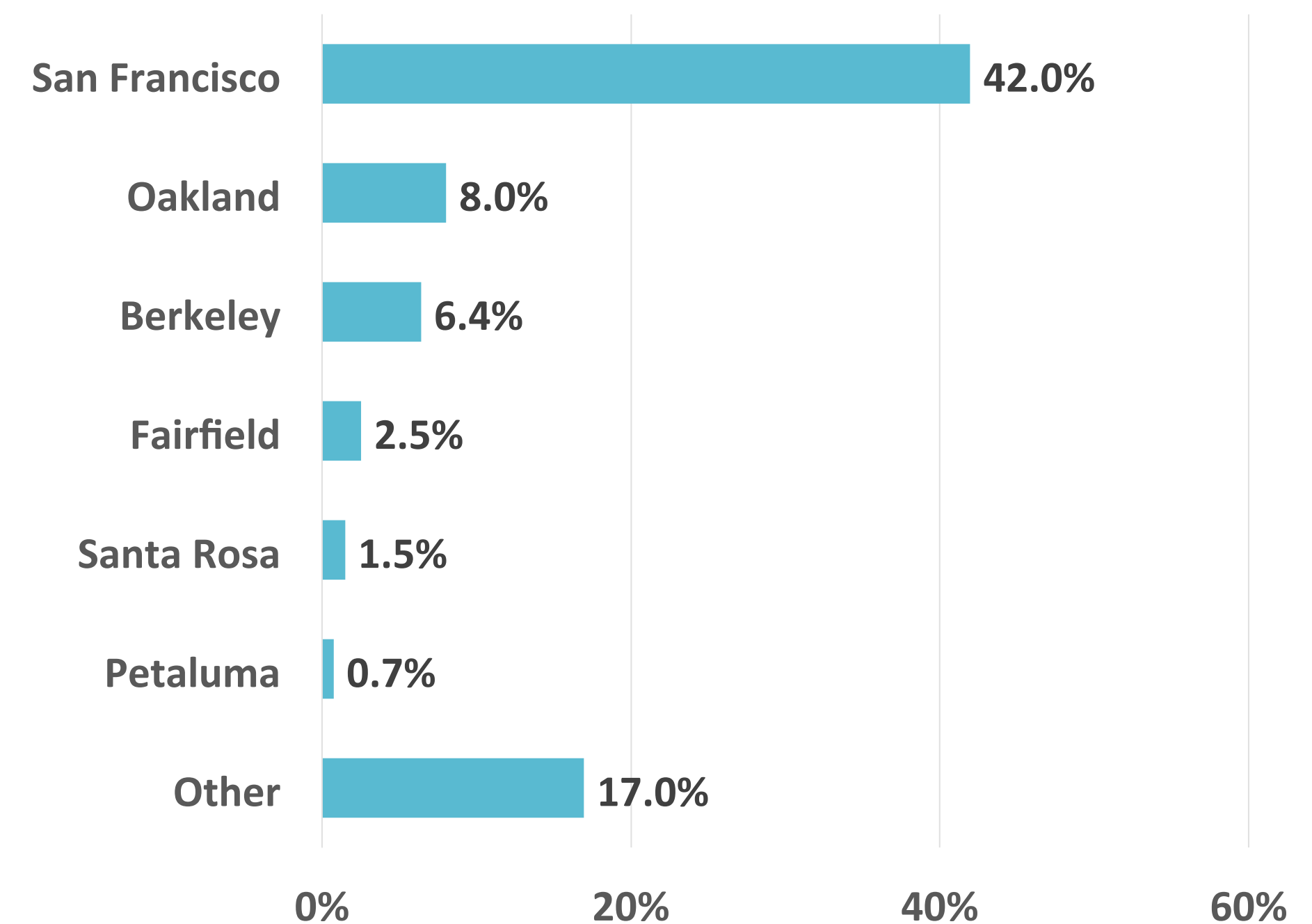


Day Trip Visitors: City Visitors are Day Tripping From

The largest proportion of day trip visitors surveyed made their trip to the Napa Valley from San Francisco (42.0%). The survey asked day trip visitors which city they made their trip to Napa Valley from. The largest proportion of this group had traveled from San Francisco, followed by Oakland (8.0%) and Berkeley (6.4%). Additionally, 17.0 percent of respondents from this group made their trip from a city not listed in the question. Of respondents who said “other” a notable percentage made their day trip to the Napa Valley from Sacramento (4.2%), San Jose (2.7%), Sonoma (2.2%) and Vallejo (2.2%).

Question: What city did you make this day trip to Napa Valley from? Base: Respondents who came to the Napa Valley for a day trip. 826 responses (weighted).

Chart 3: City Visitors are Day Tripping From

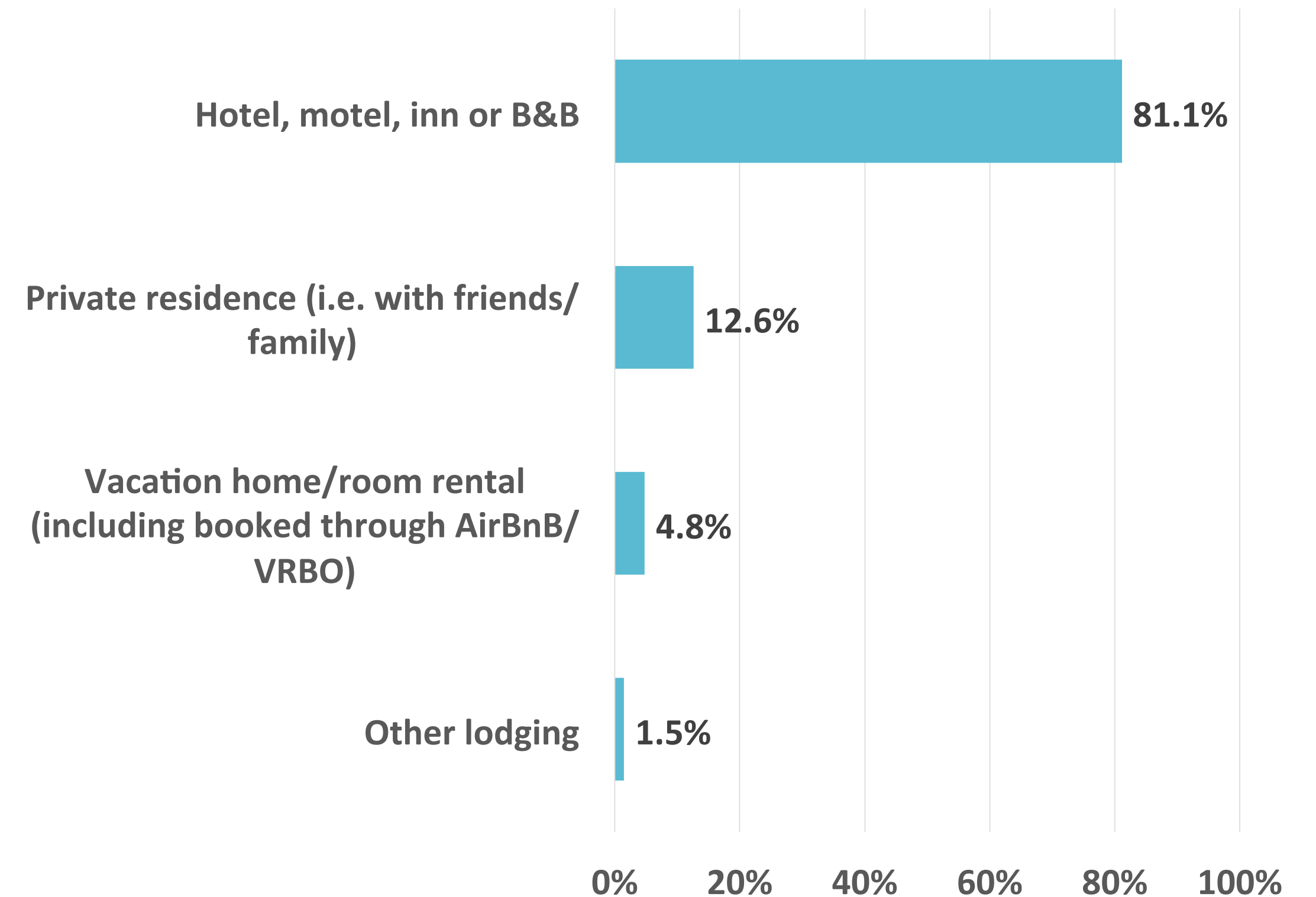


Overnight Visitors: Place of Stay in the Napa Valley Area

The large majority of overnight visitors surveyed in 2016 stayed in a Napa Valley area hotel, motel, inn or B&B. In total, 81.1 percent of overnight visitors surveyed stayed in a hotel within the area. 12.6 percent stayed in the private residence of a friend or family member and 4.8 percent were in a vacation home or room rental.

Question: Where are you staying overnight in Napa Valley? (Surveyor categorize as appropriate) Base: Respondents who stayed overnight in the Napa Valley area during their visit. 642 responses (weighted).

Chart 4: Overnight Visitors: Place of Stay in the Napa Valley Area

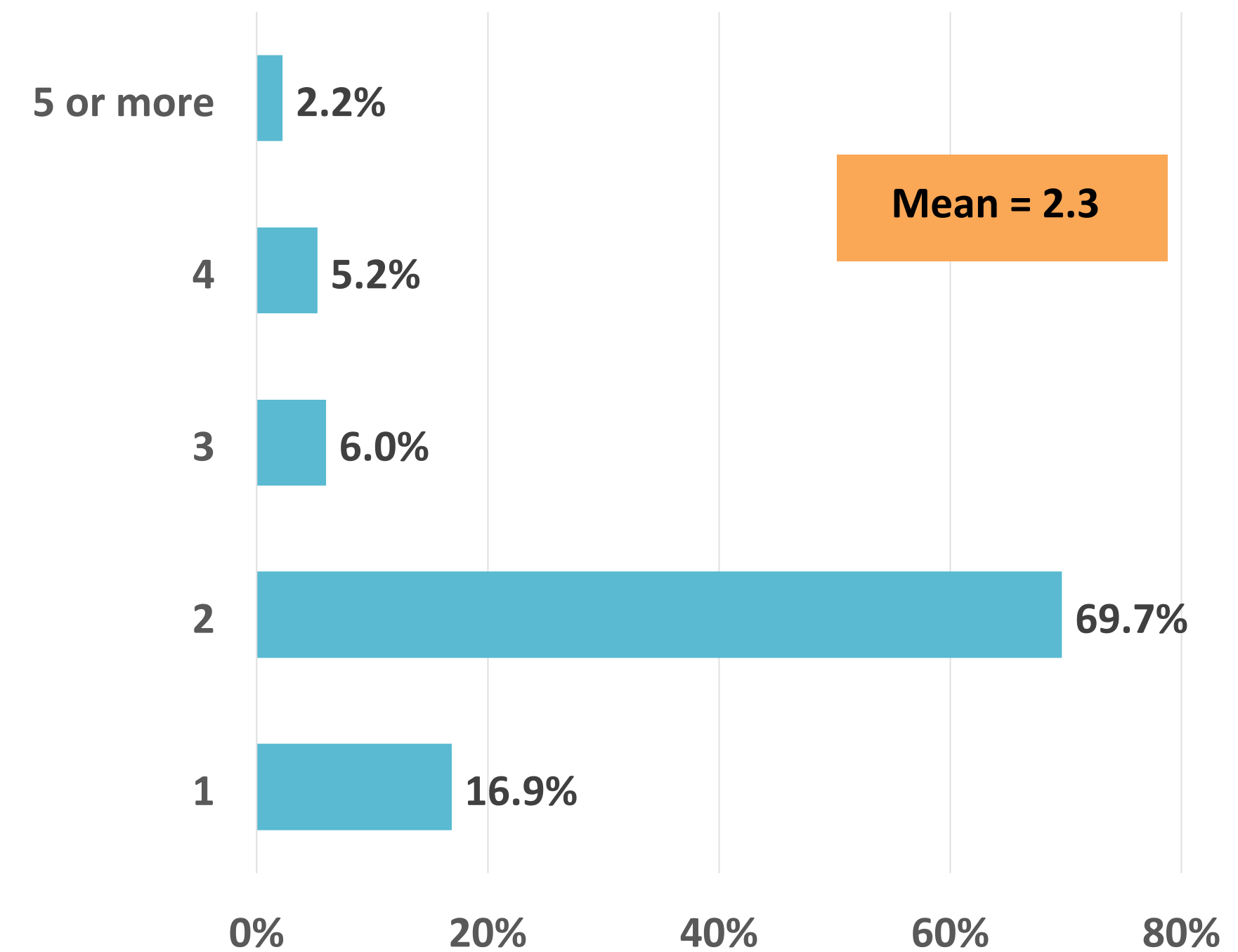


Paid Lodging Guests: Number of People in Lodging Accommodations

The Napa Valley hotel, motel, inn or B&B room accommodated an average of 2.3 persons in 2016. Napa Valley visitors who stayed in a hotel, motel, inn or B&B room were asked how many people, including themselves, stayed in their paid accommodations. Nearly seven-in-ten stayed with one other person (69.7%), while 16.9 percent were the sole occupant.

Question: How many people stayed in your hotel/motel/inn/B&B room, including yourself? Please enter a numeric value below. Base: Respondents who stayed overnight in the Napa Valley in paid accommodations. 267 responses (weighted).

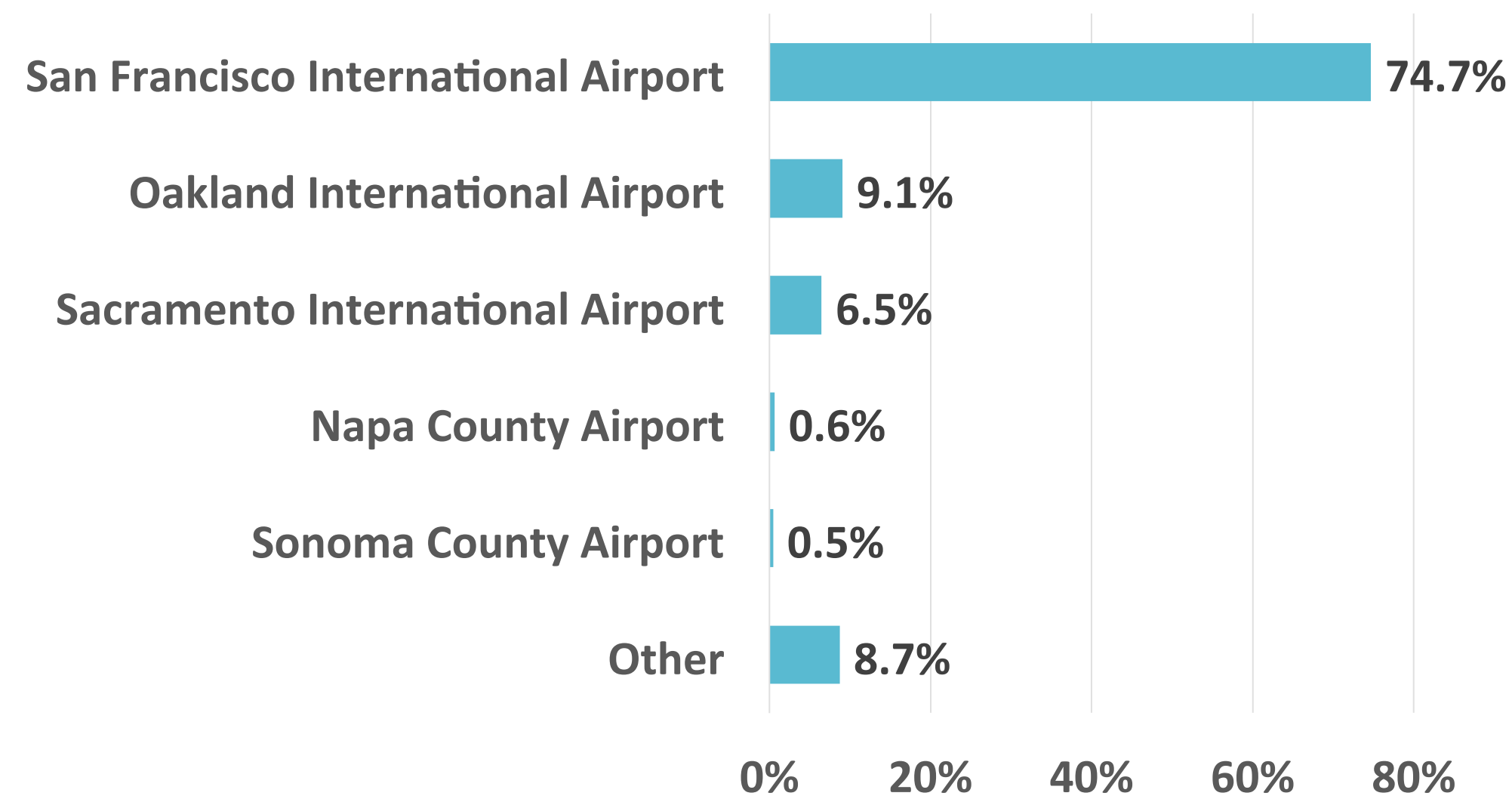
Chart 5: Number of People in Lodging Accommodations



Airport Used

In 2016, Napa Valley visitors surveyed who arrived to the area by plane primarily flew into the San Francisco International Airport (SFO). In total, 74.7 percent of this group flew into SFO for their Napa Valley trip. Another 9.1 percent of Napa Valley visitors who flew into the area arrived through the Oakland International Airport, followed by 6.5 percent who flew into the Sacramento Airport.

Chart 6: Airport Used



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
San Francisco International Airport	63.5%	72.7%	74.5%	78.6%
Oakland International Airport	17.2%	13.6%	10.6%	6.0%
Sacramento International Airport	12.0%	4.5%	8.5%	4.5%
Napa County Airport	1.0%	0.0%	0.0%	0.6%
Sonoma County Airport	0.5%	4.5%	0.0%	0.3%
Other	5.7%	4.5%	6.4%	10.1%
Sample size:	192	22	47	336

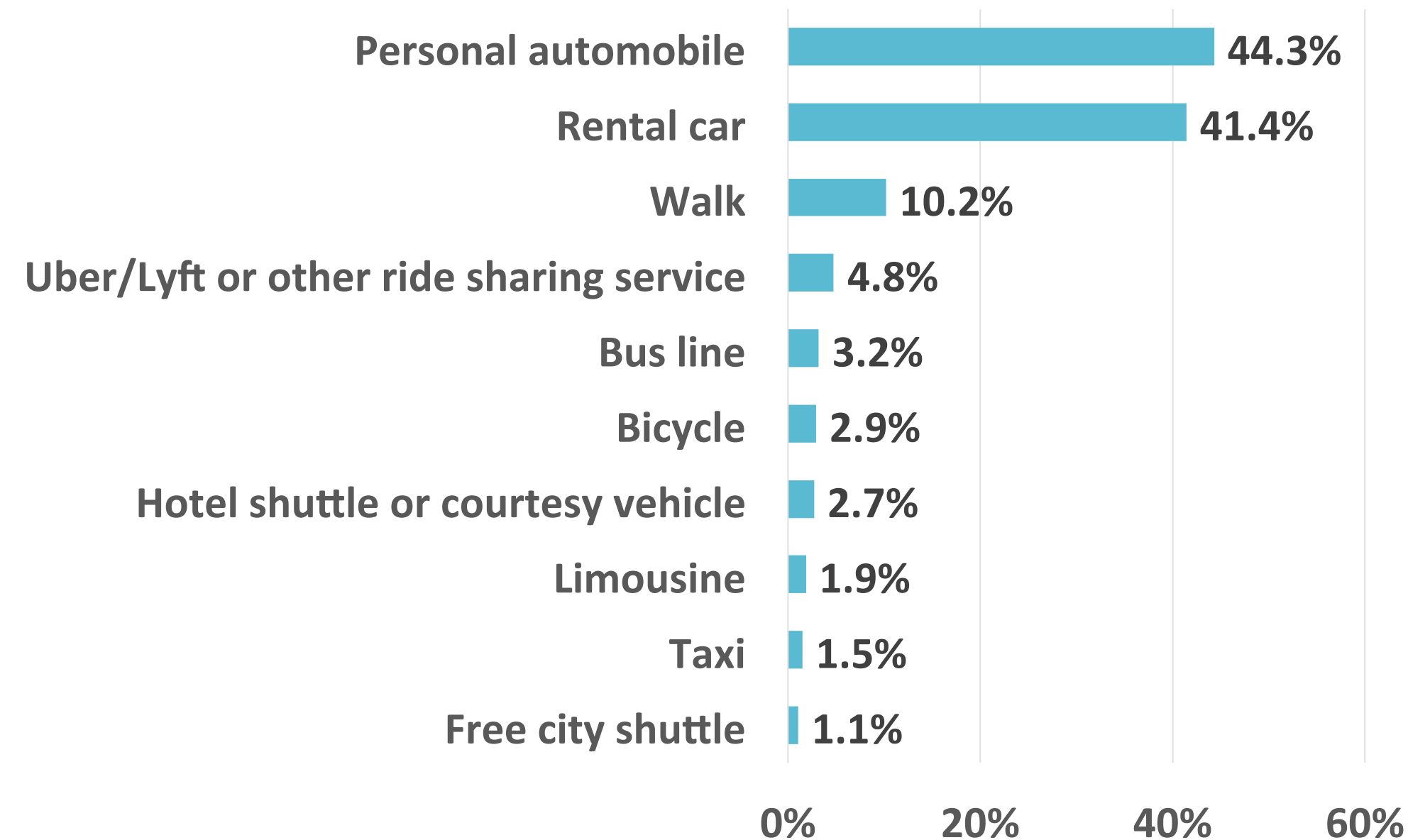
Base: Respondents who arrived to the area by plane. 597 responses (weighted).

Question: If you arrived in the area by plane, which airport did you use?

Modes of Transportation Used In-Market

While in-market, over 40 percent of visitors used a personal automobile (44.3%) or rental car (41.4%) to get around the Napa Valley. Other methods commonly used while in the Napa Valley were walking (10.2%), and/or a ride sharing service such as Uber or Lyft (4.8%). Overall, 3.2 percent of all visitors surveyed used public transit to get around the Napa Valley during their trip—with day trip visitors being the most likely to do so compared to the other visitor segments (4.1%).

Chart 7: Modes of Transportation Used In-Market



Base: All respondents. 1,247 responses (weighted).

Detail by Type of Visitor

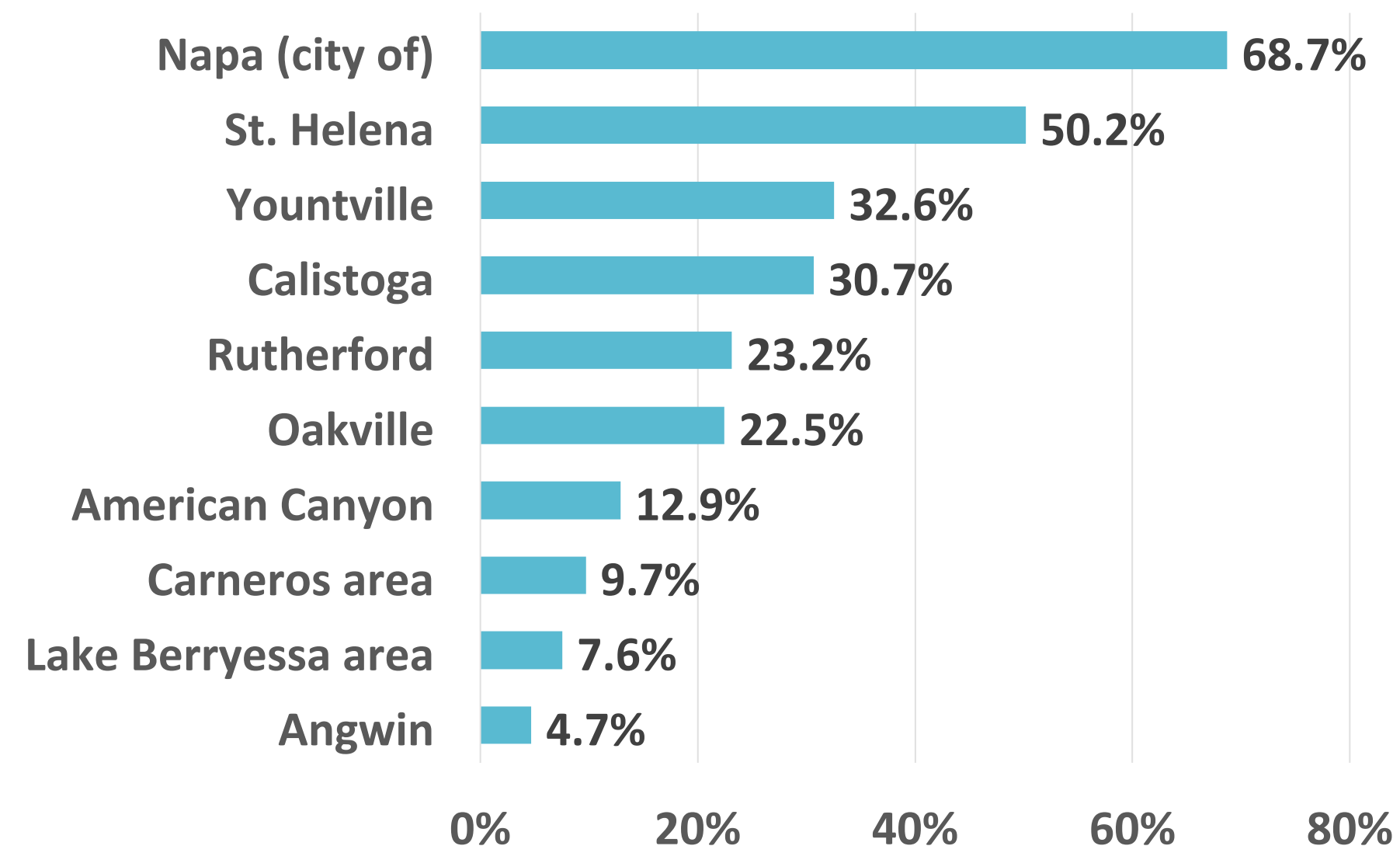
	Lodging Guest	Home Share Rental	VFR	Day Trip
Personal automobile	36.5%	25.0%	39.4%	48.3%
Rental car	40.9%	64.3%	50.7%	40.7%
Walk	13.7%	17.9%	18.3%	8.2%
Uber/Lyft or other ride sharing service	5.8%	10.7%	11.3%	3.8%
Bus line	1.4%	0.0%	1.4%	4.1%
Bicycle	3.7%	10.7%	9.9%	2.0%
Hotel shuttle or courtesy vehicle	7.0%	0.0%	2.8%	1.3%
Limousine	1.4%	0.0%	5.6%	1.8%
Taxi	2.3%	3.6%	4.2%	1.0%
Free city shuttle	1.6%	0.0%	4.2%	0.7%
Sample size:	430	28	71	710

Question: On this trip, which methods of transportation will you utilize while in the Napa Valley? (SELECT ALL THAT APPLY)

Napa Valley Areas Visited

The city of Napa (68.7%) and St. Helena (50.2%) had the highest reported visitation amongst all visitors surveyed in 2016. These areas were followed by Yountville (32.6%) and Calistoga (30.7%). In comparing day trip visitors to lodging guests, day trip visitors are more likely to visit the city of Napa (72.7% vs. 57.7%) and St. Helena (52.1% vs. 42.1%).

Chart 8: Napa Valley Areas Visited



Base: All respondents. 1,247 responses (weighted).

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Napa (city of)	57.7%	75.0%	74.6%	72.7%
St. Helena	42.1%	50.0%	70.4%	52.1%
Yountville	36.0%	42.9%	49.3%	30.1%
Calistoga	38.8%	28.6%	45.1%	27.0%
Rutherford	27.9%	21.4%	39.4%	20.6%
Oakville	20.2%	39.3%	35.2%	22.1%
American Canyon	11.2%	7.1%	12.7%	13.8%
Carneros area	9.8%	17.9%	15.5%	9.2%
Lake Berryessa area	4.7%	7.1%	16.9%	8.0%
Angwin	2.6%	3.6%	11.3%	5.1%
Sample size:	430	28	71	710

Question: On this trip, which Napa Valley towns or areas have you (or will you) visit? (SELECT ALL THAT APPLY)

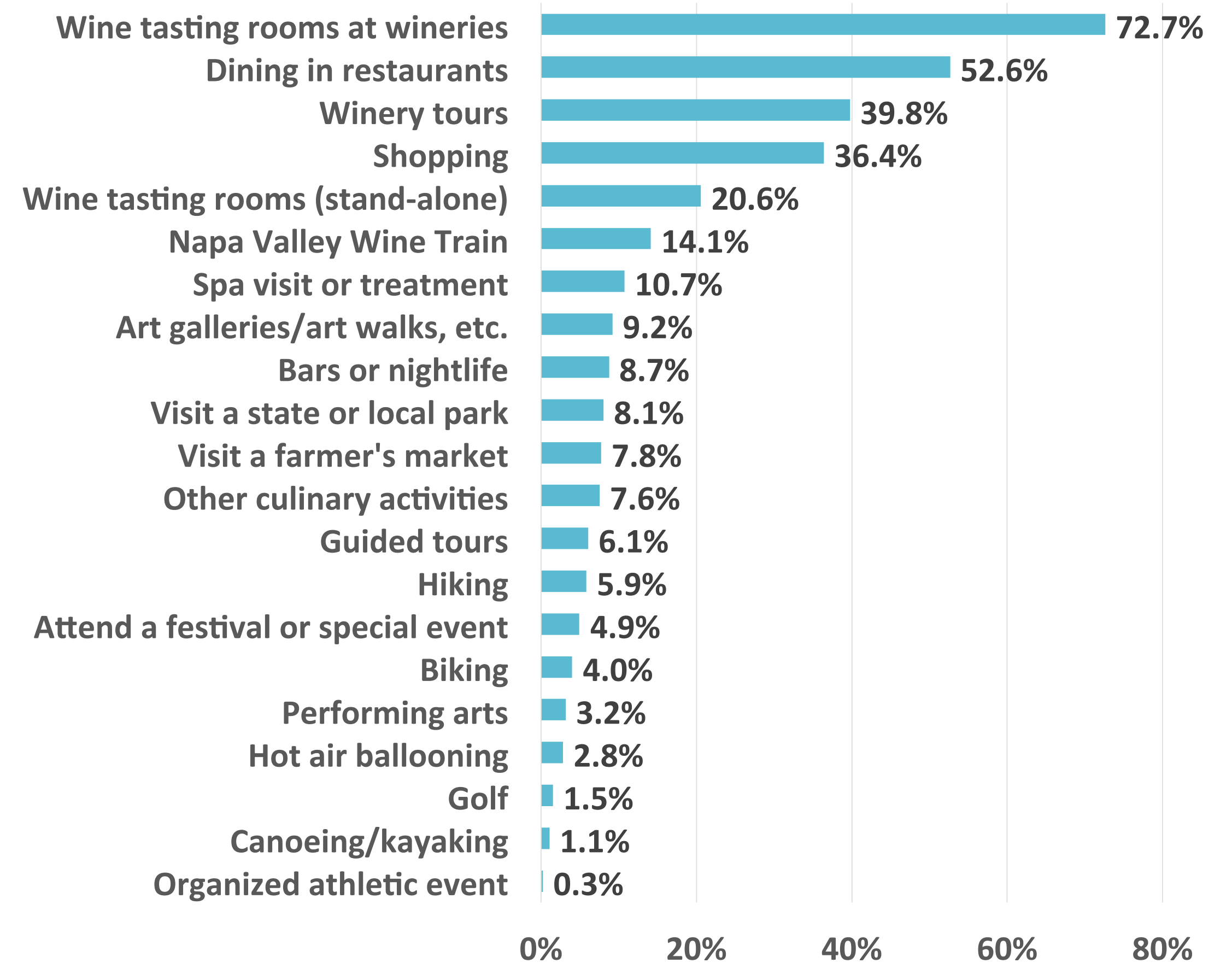
Activities/Attractions in The Napa Valley

Napa Valley’s visitors most commonly went to wine tasting rooms at wineries and dined in restaurants. Presented with a list of twenty-one activities, visitors were asked which they would participate in while in Napa Valley. As expected, the top activity was wine tasting at wineries (72.7%) followed by dining in restaurants (52.6%). In addition, 39.8 percent went on a winery tour, while 36.4 percent of visitors shopped on their trip. In comparison by visitor type, home share rental and day trip visitors are more likely to visit the Napa Valley Wine Train compared to other segments (21.4% and 16.8%, respectively). Lodging guests, however, are more likely to visit a spa compared to other visitors (23.7%).

The data segmented by visitor type is presented on the next slide.

Question: On this trip, in which activities or attractions will you participate in while in the Napa Valley? (SELECT ALL THAT APPLY) Base: All respondents. 1,247 responses (weighted).

Chart 9: Activities/Attractions in The Napa Valley



Activities/Attractions – Complete Detail

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Wine tasting rooms at wineries	55.3%	89.3%	78.9%	78.6%
Dining in restaurants	64.7%	85.7%	73.2%	46.5%
Winery tours	29.8%	64.3%	40.8%	43.0%
Shopping	39.1%	57.1%	54.9%	33.9%
Wine tasting rooms (stand-alone)	15.8%	32.1%	25.4%	21.8%
Napa Valley Wine Train	7.2%	21.4%	11.3%	16.8%
Spa visit or treatment	23.7%	7.1%	9.9%	6.3%
Art galleries/art walks, etc.	11.4%	7.1%	18.3%	7.9%
Bars or nightlife	14.0%	10.7%	16.9%	6.3%
Visit a state or local park	10.7%	14.3%	19.7%	6.2%
Visit a farmer's market	7.7%	7.1%	19.7%	7.0%
Other culinary activities	5.8%	10.7%	15.5%	7.6%
Guided tours	4.7%	7.1%	9.9%	6.3%
Hiking	6.7%	14.3%	14.1%	4.8%
Attend a festival or special event	7.0%	7.1%	8.5%	3.9%
Biking	4.0%	17.9%	14.1%	3.0%
Performing arts	1.6%	7.1%	7.0%	3.4%
Hot air ballooning	2.6%	3.6%	2.8%	3.0%
Golf	3.0%	3.6%	1.4%	1.0%
Canoeing/kayaking	0.2%	0.0%	1.4%	1.4%
Organized athletic event	0.7%	0.0%	0.0%	0.1%
Sample size:	430	28	71	710

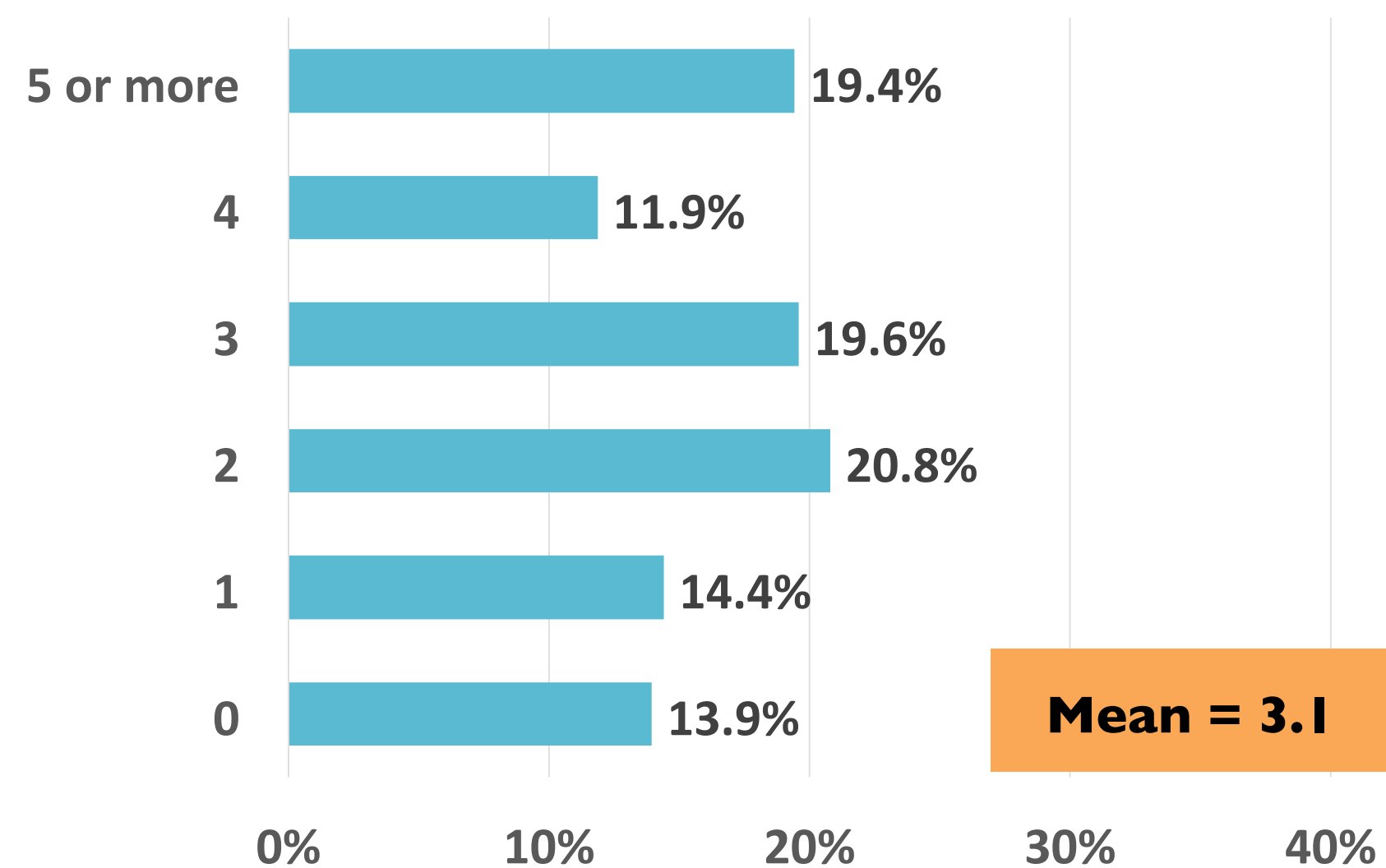
Question: On this trip, in which activities or attractions will you participate in while in the Napa Valley? (SELECT ALL THAT APPLY)

Base: All respondents. 1,247 responses (weighted).

Number of Napa Valley Wineries Visited

The average Napa Valley area visitor went to 3.1 wineries during their trip. Napa Valley visitors were asked how many area wineries they visited or planned to visit during their trip. Over eight-in-ten visitors went to at least 1 winery while on their Napa Valley trip (86.1%). In comparing visitor types, VFRs (5.5) and home share rental visitors went to more wineries on average compared to lodging guests and day trippers (4.9 and 3.5 wineries, respectively vs. 2.7 wineries).

Chart 10: Number of Napa Valley Wineries Visited



Base: All respondents. 1,131 responses (weighted).

Detail by Type of Visitor

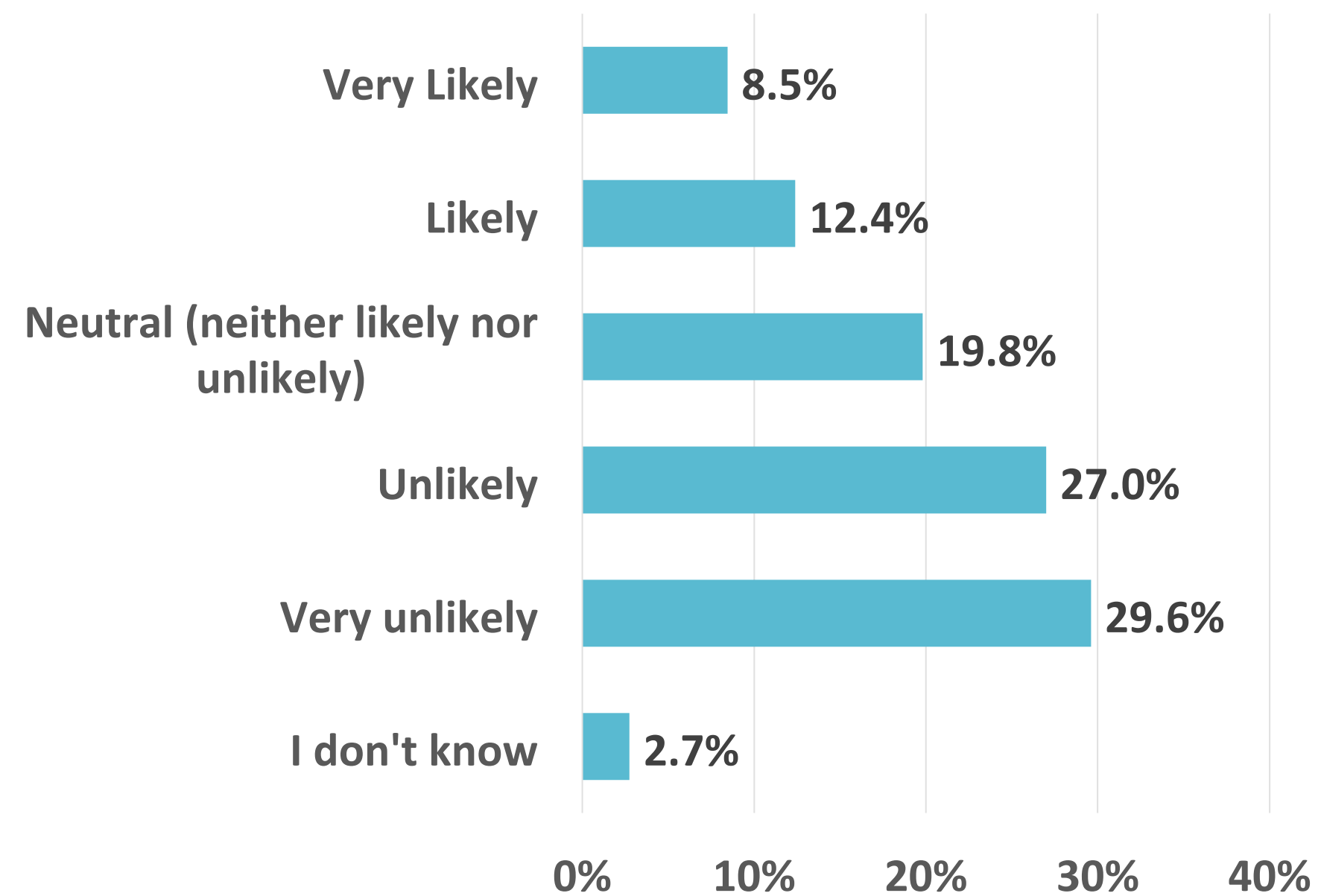
	Lodging Guest	Home Share Rental	VFR	Day Trip
5 or more	28.2%	28.6%	49.3%	14.5%
4	8.7%	35.7%	8.5%	12.4%
3	14.2%	17.9%	12.7%	21.8%
2	15.7%	7.1%	9.9%	23.6%
1	11.3%	3.6%	12.7%	15.8%
0	21.8%	7.1%	7.0%	11.9%
Mean	3.5	4.9	5.5	2.7
Sample size:	344	28	71	683

Question: How many Napa Valley wineries or tasting rooms did you (or will you) visit during your stay?

Likelihood to Join a Winery's Wine Club (Intercept)

One-in-five Napa Valley visitors surveyed said they were either “likely” (12.4%) or “very likely” (8.5%) to join a wine club while on their trip. Visitors who took the intercept survey were asked their likelihood of joining a wine club while in the Napa Valley. Home share rental visitors (34.6% top-two box score of “Likely” or “Very likely”) and lodging guests (25.4% top-two box score) had the highest likelihood of joining a wine club compared to the other visitor types.

Chart 12: Likelihood to Join a Winery's Wine Club



Base: Intercept survey respondents. 875 responses (weighted).

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Very Likely	11.4%	15.4%	8.7%	8.0%
Likely	14.0%	19.2%	8.7%	12.3%
Neutral (neither likely nor unlikely)	21.1%	15.4%	21.7%	19.7%
Unlikely	19.3%	23.1%	30.4%	27.6%
Very unlikely	33.3%	23.1%	29.0%	29.4%
I don't know	0.9%	3.8%	1.4%	3.0%
Sample size:	114	26	69	666

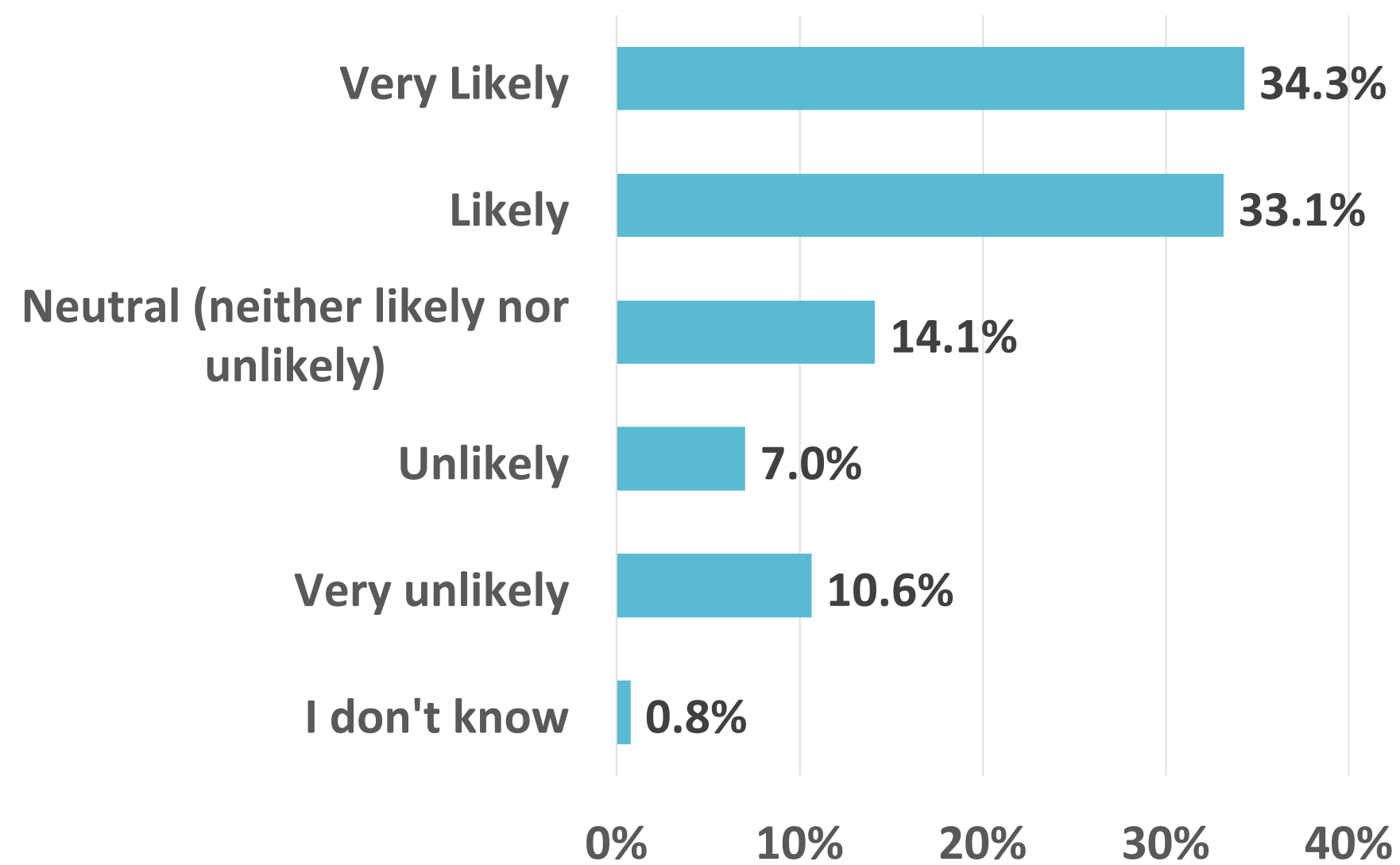
Question: How likely are you to join a winery's wine club while on this trip to Napa Valley?

Likelihood to Buy Wine at a Winery to Take Home (Intercept)

Two-thirds of visitors surveyed in 2016 said they were either “likely” (33.1%) or “very likely” (34.3%) to buy wine at a winery to take home with them.

VFRs (75.7% top-two box score of “Likely” or “Very likely”) and home share rental visitors (74.1% top-two box score) had the highest likelihood to purchase wine at a winery compared to the other visitor types.

Chart 13: Likelihood to Buy Wine at a Winery to Take Home



Base: Intercept survey respondents. 890 responses (weighted).

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Very Likely	39.8%	55.6%	50.0%	32.1%
Likely	22.1%	18.5%	25.7%	35.1%
Neutral (neither likely nor unlikely)	12.4%	18.5%	12.9%	14.3%
Unlikely	8.8%	3.7%	1.4%	7.4%
Very unlikely	15.0%	3.7%	10.0%	10.4%
I don't know	1.8%	0.0%	0.0%	0.7%
Sample size:	113	27	70	680

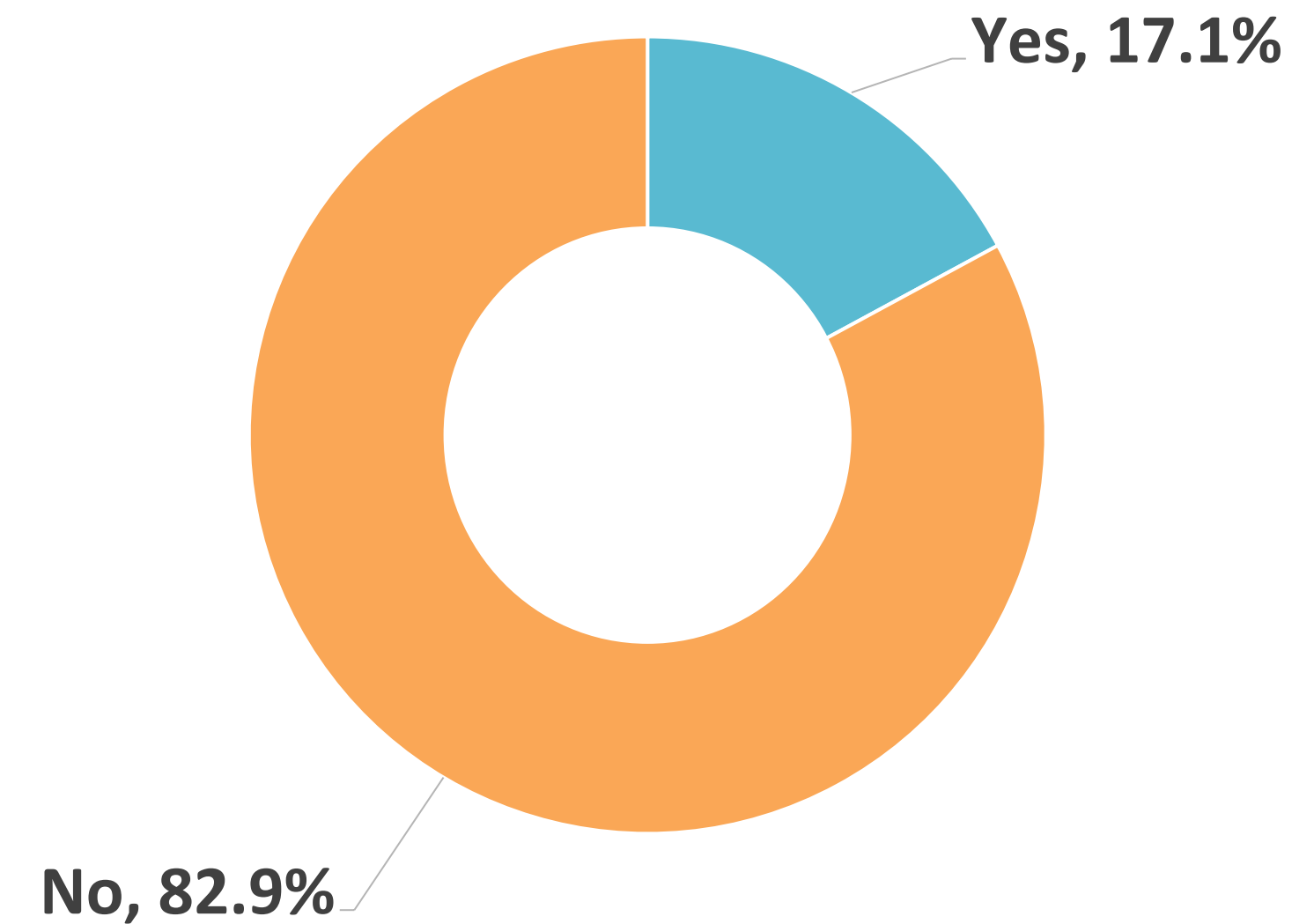
Question: How likely are you to buy wine at a winery to take with you or ship home?

Joined a Winery's Wine Club (Lodging Guest Survey)

In total, 17.1 percent of lodging guest survey respondents stated that they indeed had joined a wine club during their visit to the Napa Valley. The majority of this group however, did not join a winery's wine club while on their trip (82.9%).

Question: Did you join a winery's wine club while on this trip to Napa Valley?
Base: Lodging Guest Survey respondents. 228 responses (weighted).

Chart 14: Joined a Winery's Wine Club

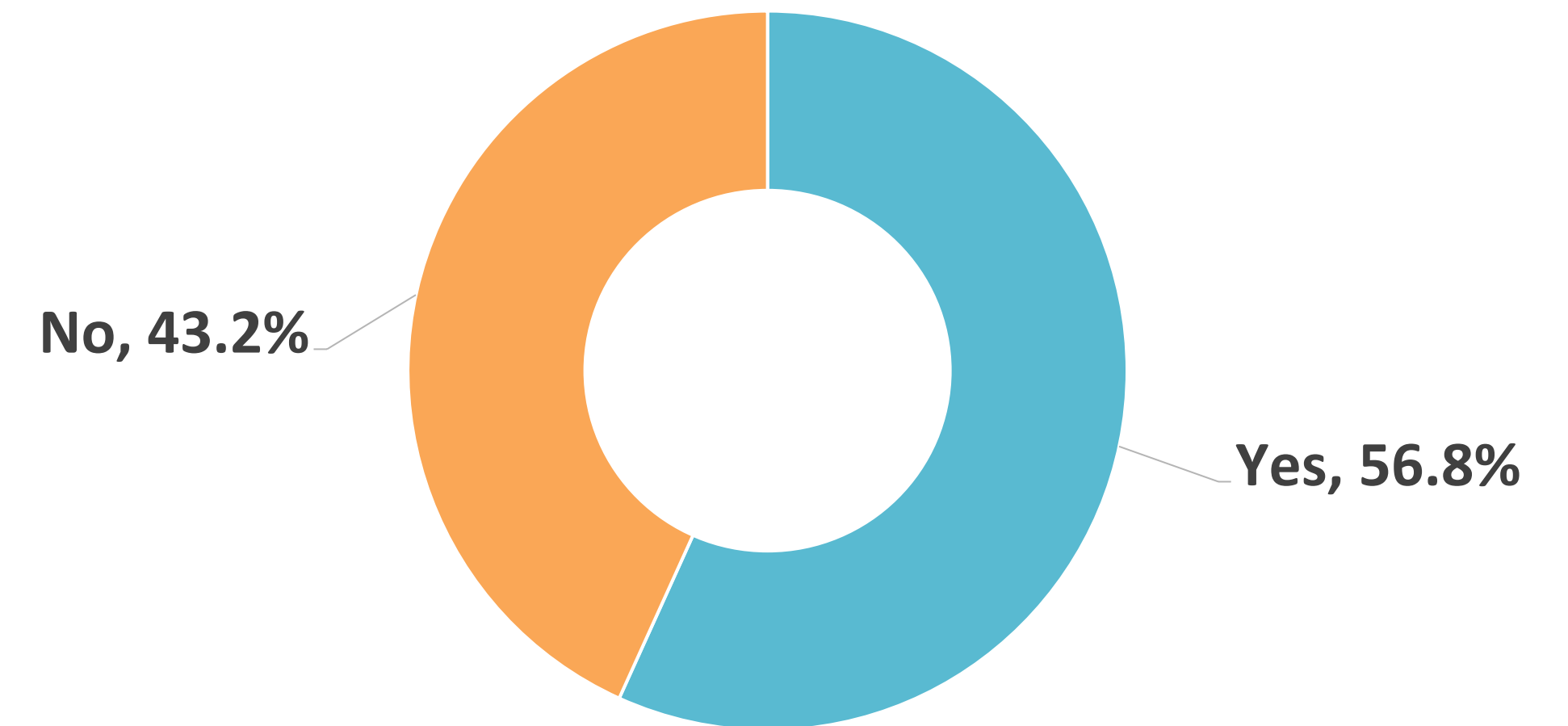


Purchased Wine to Take Home (Lodging Guest Survey)

In 2016, over half of lodging guest survey respondents purchased wine in the Napa Valley to take or ship home (56.8%).

Question: Did you buy wine at a winery to take home with you or ship home?
Base: Lodging Guest Survey respondents. 228 responses (weighted).

Chart 15: Purchased Wine to Take Home

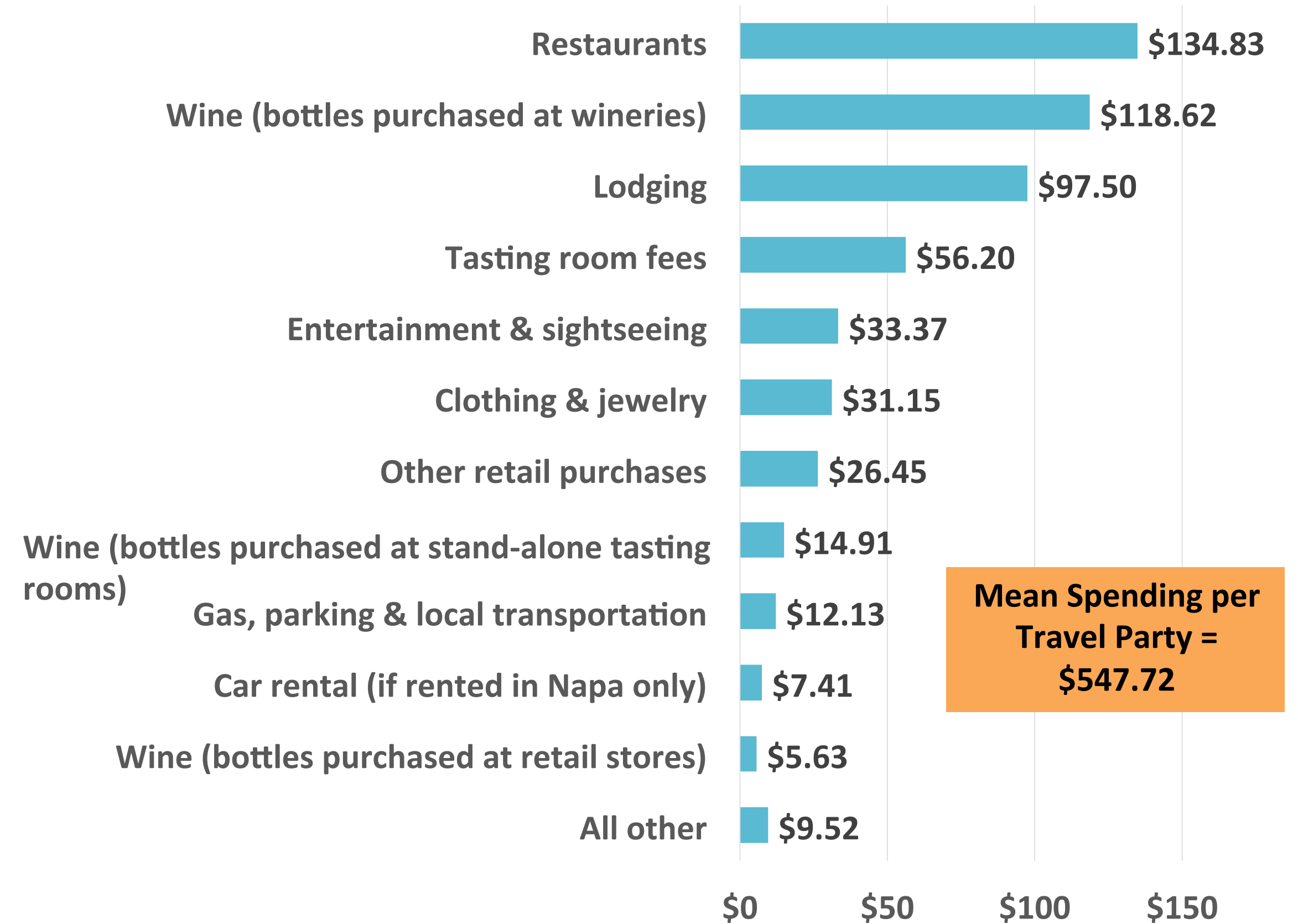


Spending Per Day, Per Travel Party

The average travel party to the Napa Valley spent **\$547.72 per trip day in the area**. The bulk of this spending is attributed to restaurants (\$134.83) and wine bottles purchased at wineries (\$118.62). Other top expenditures include accommodations (\$97.50 across all visitor segments – Lodging guests paid an average of \$265.43 for lodging), tasting room fees (\$56.20) and entertainment and sightseeing (\$33.37). When comparing spending by visitor type, lodging guest visitors spend considerably more than VFRs and day trippers (\$839.92 vs. \$595.34 VFR and \$356.86 day trip). It is important to note that the \$97.50 average spend for hotels (shown at right) includes all visitors, even those not staying in a hotel. This data is not reflective of average room rates.

Travel party spending data segmented by visitor type is presented on the next slide.

Chart 16: Spending Per Day, Per Travel Party



Question: Approximately how much will you spend in the Napa Valley PER DAY on the following. Base: All respondents. 980 responses (weighted).

Spending Per Day, Per Travel Party (continued)

Detail by Type of Visitor

	Total	Hotel Guest	Home Share Rental	VFR	Day Trip
Restaurants	\$134.83	\$194.71	\$205.00	\$157.27	\$95.84
Wine (bottles purchased at wineries)	\$118.62	\$148.26	\$192.73	\$119.38	\$98.71
Lodging	\$97.50	\$265.43	\$291.15	\$0.00	\$0.00
Tasting room fees	\$56.20	\$45.00	\$83.08	\$65.86	\$60.09
Entertainment & sightseeing	\$33.27	\$27.86	\$47.69	\$39.22	\$35.10
Clothing & jewelry	\$31.15	\$44.86	\$13.46	\$125.31	\$13.83
Other retail purchases	\$26.45	\$34.46	\$30.77	\$22.50	\$22.26
Wine (bottles purchased at stand-alone tasting rooms)	\$14.91	\$27.05	\$16.15	\$0.88	\$9.69
Gas, parking & local transportation	\$12.13	\$16.49	\$24.62	\$24.92	\$7.71
Car rental (if rented in Napa only)	\$7.41	\$9.76	\$10.62	\$34.53	\$2.94
Wine (bottles purchased at retail stores)	\$5.63	\$6.66	\$4.81	\$3.38	\$5.35
All other	\$9.52	\$19.37	\$0.00	\$2.11	\$5.34
Mean Spending per Travel Party:	\$547.72	\$839.92	\$920.08	\$595.34	\$356.86
Sample size:	980	318	26	64	572

Question: Approximately how much will you spend in the Napa Valley PER DAY on the following:

Base: All respondents. 980 responses (weighted).

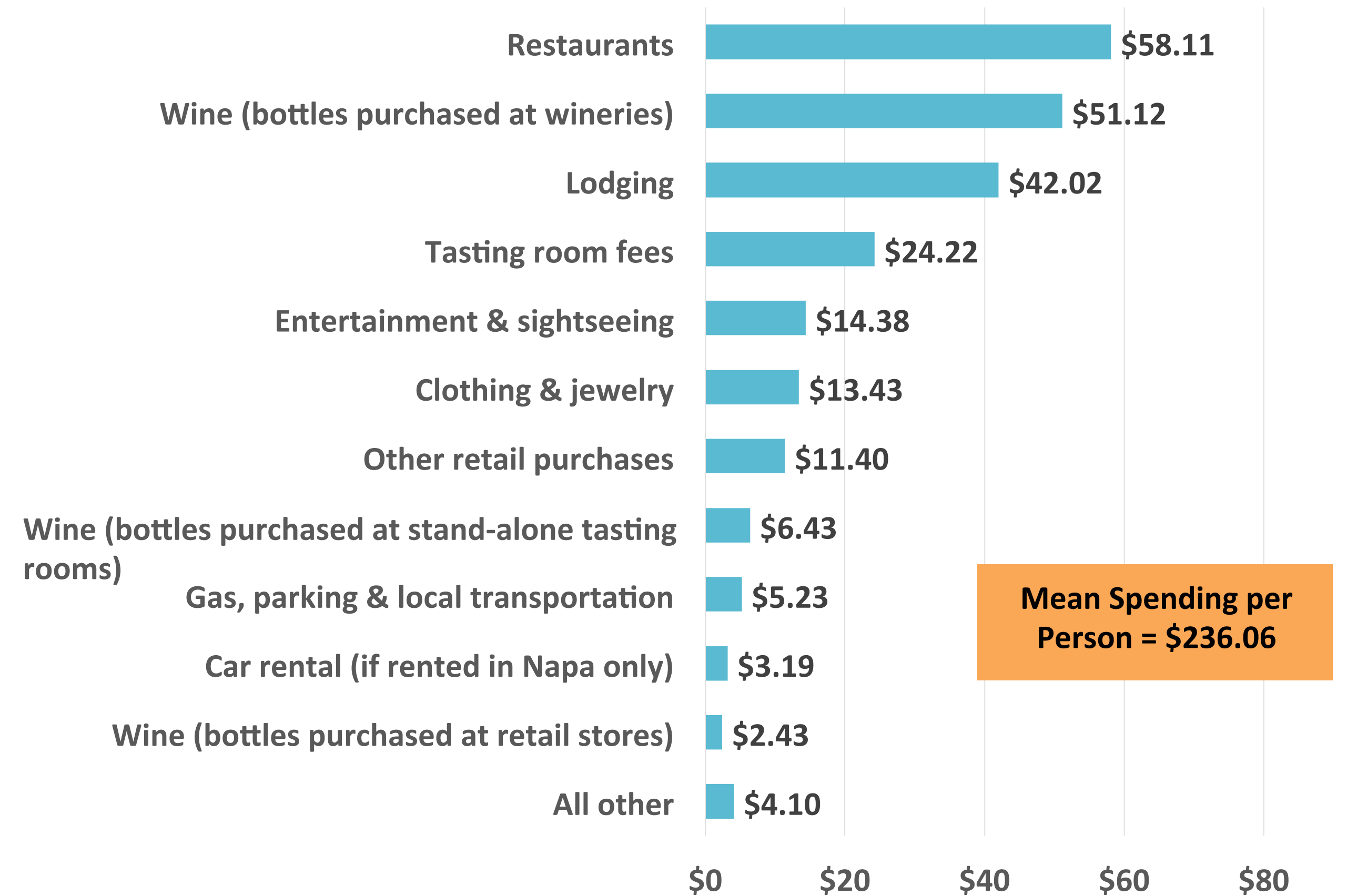
Spending Per Day, Per Person

It is estimated that the average Napa Valley visitor represents **\$236.06 in daily in-market spending**. This is based on the reported daily spending of \$547.72 covering an average of 2.3 travelers. When comparing spending by visitor type, home share rental visitors (\$403.54) and lodging guests (\$401.59) spend considerably more per person than the other segments (VFR - \$262.28 and day trippers - \$145.89).

Per person spending data segmented by visitor type is presented on the next slide.

Question: How many persons' travel expenses will this spending fully cover (including yourself)? Base: All respondents. 980 responses (weighted).

Chart 17: Spending Per Day, Per Person



Spending Per Day, Per Person (continued)

Detail by Type of Visitor

	Total	Lodging Guest	Home Share Rental	VFR	Day Trip
Restaurants	\$58.11	\$93.10	\$89.91	\$69.28	\$39.18
Wine (bottles purchased at wineries)	\$51.12	\$70.89	\$84.53	\$52.59	\$40.36
Lodging	\$42.02	\$126.91	\$127.70	\$0.00	\$0.00
Tasting room fees	\$24.22	\$21.51	\$36.44	\$29.01	\$24.56
Entertainment & sightseeing	\$14.38	\$13.32	\$20.92	\$17.28	\$14.35
Clothing & jewelry	\$13.43	\$21.45	\$5.90	\$55.21	\$5.65
Other retail purchases	\$11.40	\$16.48	\$13.50	\$9.91	\$9.10
Wine (bottles purchased at stand-alone tasting rooms)	\$6.43	\$12.94	\$7.09	\$0.39	\$3.96
Gas, parking & local transportation	\$5.23	\$7.89	\$10.80	\$10.98	\$3.15
Car rental (if rented in Napa only)	\$3.19	\$4.67	\$4.66	\$15.21	\$1.20
Wine (bottles purchased at retail stores)	\$2.43	\$3.18	\$2.11	\$1.49	\$2.19
All other	\$4.10	\$9.26	\$0.00	\$0.93	\$2.18
Mean # of People Covered by Spending	2.3	2.1	2.3	2.3	2.4
Mean Spending per Person:	\$236.06	\$401.59	\$403.54	\$262.28	\$145.89
Sample size:	980	318	26	64	572

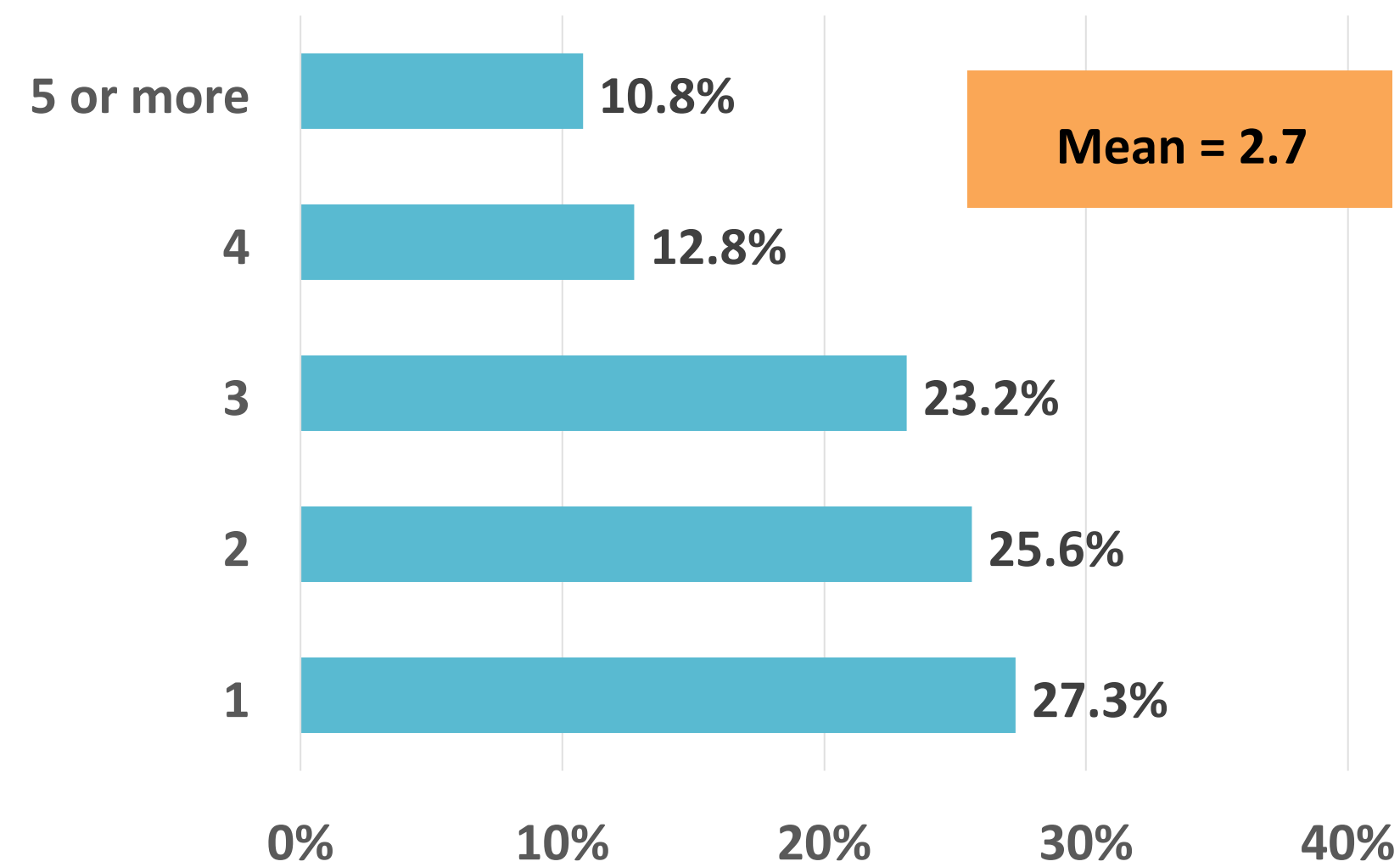
Question: How many persons' travel expenses will this spending fully cover (including yourself)?

Base: All respondents. 980 responses (weighted).

Days Spent in Napa Valley

On average, visitors spend 2.7 days in Napa Valley during their trip. Visitors staying in private homes (VFR) in the area had the longest length of stay averaging 3.5 days while lodging guests spent an average of 3.0 days in the Napa Valley.

Chart 18: Days Spent in Napa Valley



Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
5 or more	12.2%	12.0%	22.0%	0.0%
4	16.7%	12.0%	16.9%	0.0%
3	31.6%	40.0%	18.6%	0.0%
2	30.1%	36.0%	33.9%	0.0%
1	8.7%	0.0%	8.5%	100.0%
Mean:	3.0	3.1	3.5	1.0
Sample size:	335	25	59	680

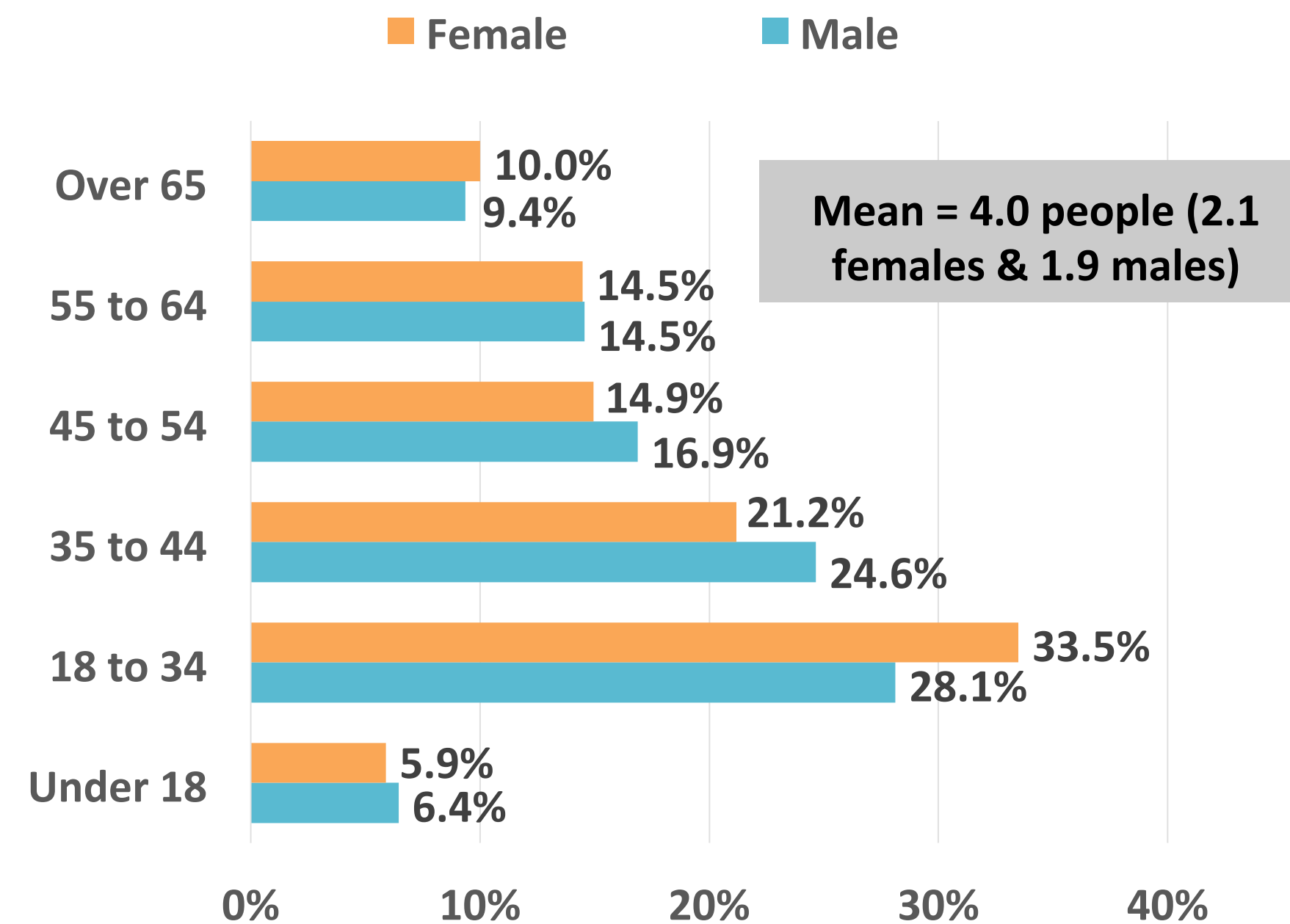
Base: All respondents. 1,099 responses (weighted).

Question: How many days will you spend in the Napa Valley?

Travel Party Composition

The average Napa Valley travel party consisted of an average of 4.0 persons, comprised of 2.1 females and 1.9 males. In total, 11.8 percent of travel parties had children in them. On average, VFR and day trip visitors had a larger travel party size compared to lodging guest visitors (4.5 and 4.4, respectively vs. 2.8 average people).

Chart 19: Travel Party Composition



Question: Please tell us how many people (including yourself) of each age group and gender are in your immediate travel party. Base: All respondents. 1,115 responses (weighted).

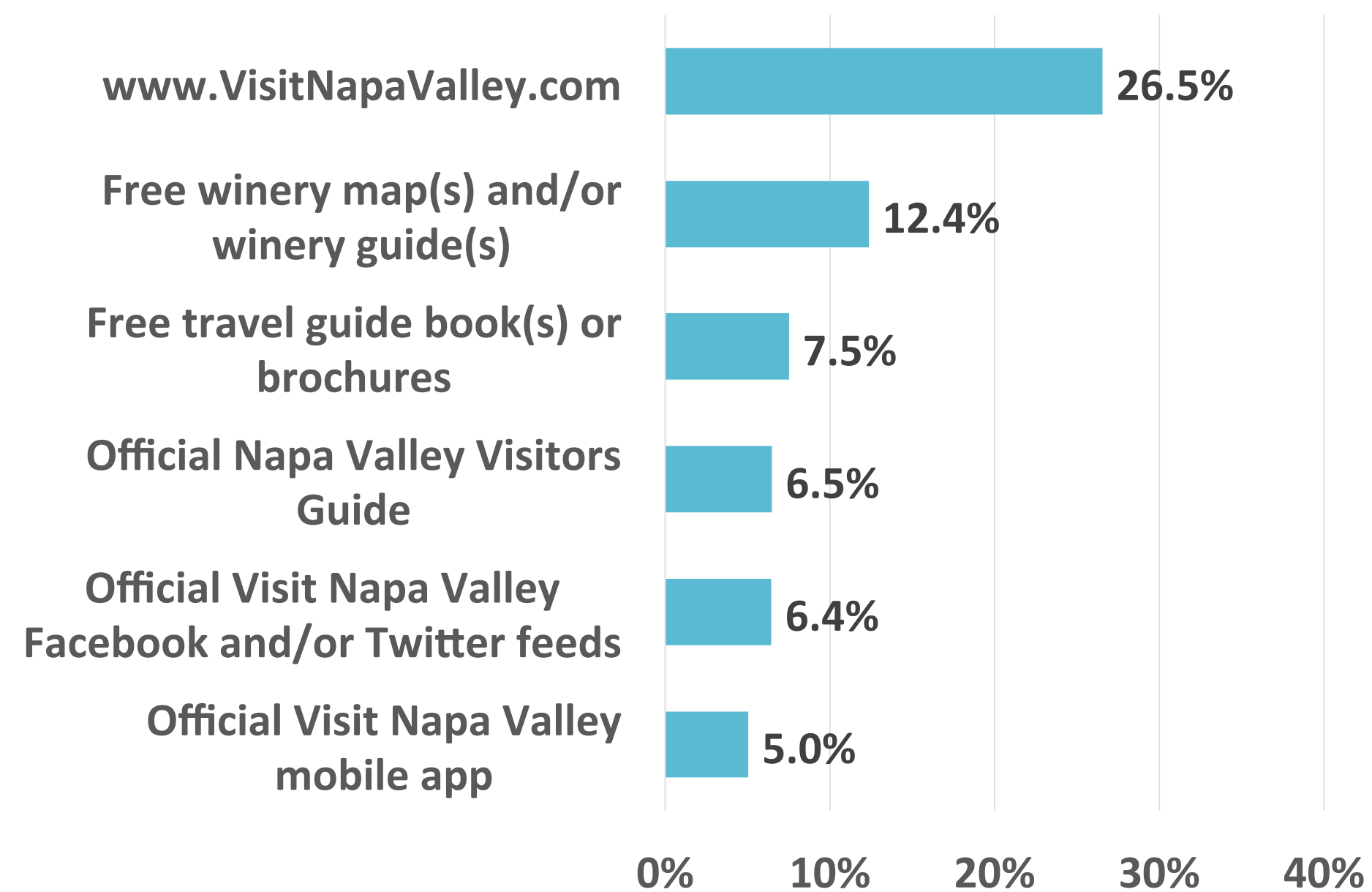
Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip	
Males	Over 65	7.0%	6.3%	5.5%	3.7%
	55 to 64	10.0%	14.1%	5.5%	6.0%
	45 to 54	8.2%	7.0%	6.5%	7.8%
	35 to 44	10.5%	3.9%	10.0%	11.9%
	18 to 34	6.9%	14.1%	12.3%	14.2%
	Under 18	1.0%	0.0%	2.9%	3.4%
Mean # of Males:	1.2	2.3	1.9	2.0	
Females	Over 65	7.7%	15.6%	9.0%	4.4%
	55 to 64	16.3%	13.3%	7.1%	6.1%
	45 to 54	8.6%	7.8%	13.5%	7.5%
	35 to 44	12.5%	5.5%	10.0%	11.5%
	18 to 34	9.5%	12.5%	15.8%	19.9%
	Under 18	1.9%	0.0%	1.9%	3.6%
Mean # of Females:	1.6	2.8	2.6	2.3	
Mean # of People in Travel Party:	2.8	5.1	4.5	4.4	
% with Children in Travel Party	5.9%	0.0%	7.2%	14.1%	
Sample size:	341	25	69	680	

Planning Resources Used Before Arrival

Of the tested resources, over one-quarter of Napa Valley visitors used VisitNapaValley.com, the official Napa Valley destination website to plan their visit to the area (26.5%). Napa Valley visitors also utilized free winery maps (12.4%), free travel guide books (7.5%) and the official Visit Napa Valley Visitors Guide (6.5%) to plan their trip. Comparing this by visitor type, day trippers (28.6%) and home share rental visitors (28.6%) were most likely to utilize VisitNapaValley.com compared to the other visitor segments.

Chart 20: Planning Resources Used Before Arrival



Base: All respondents. 1,247 responses (weighted).

Detail by Type of Visitor

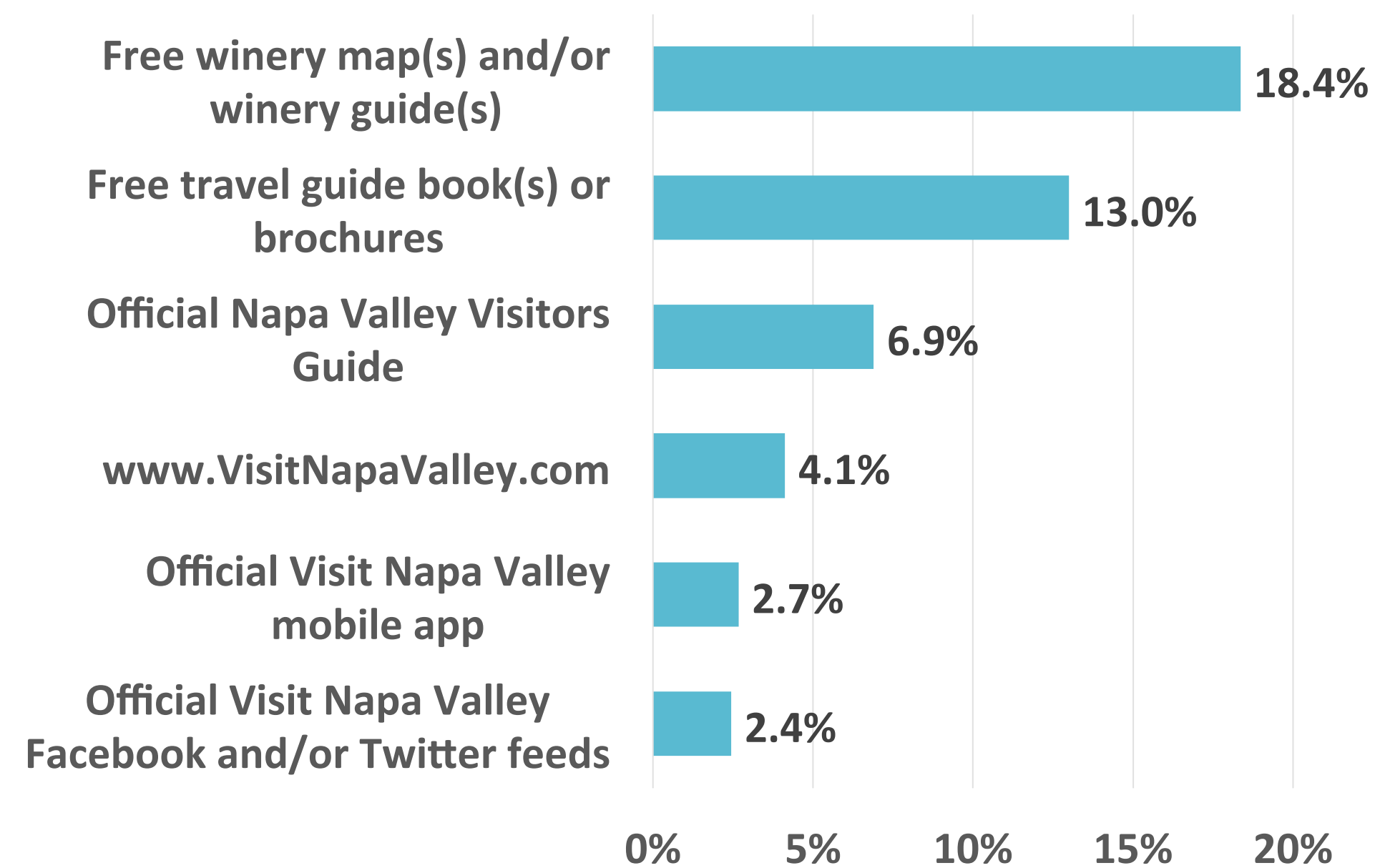
	Lodging Guest	Home Share Rental	VFR	Day Trip
Official Napa Valley destination website (www.VisitNapaValley.com)	22.1%	28.6%	22.5%	28.6%
Free winery map(s) and/or winery guide(s)	12.3%	14.3%	12.7%	12.4%
Free travel guide book(s) or brochures	9.5%	17.9%	11.3%	6.3%
Official Napa Valley Visitors Guide	7.9%	14.3%	7.0%	5.8%
Official Visit Napa Valley Facebook and/or Twitter feeds	4.0%	17.9%	11.3%	6.8%
Official Visit Napa Valley mobile app	3.3%	14.3%	7.0%	5.4%
Sample size:	430	28	71	710

Question: Which of the following tools did you use specifically to plan your trip before arriving and which will you use while in the Napa Valley area? (SELECT ALL THAT APPLY)

Planning Resources Used In-Market

Free winery maps (18.4%) and free travel guide books (13.0%) were the most utilized in-market. Other resources that visitors used while in the destination were the official Visit Napa Valley Visitors Guide (6.9%) and the official Visit Napa Valley website, VisitNapaValley.com (4.1%).

Chart 21: Planning Resources Used In-Market



Base: All respondents. 1,247 responses (weighted).

Detail by Type of Visitor

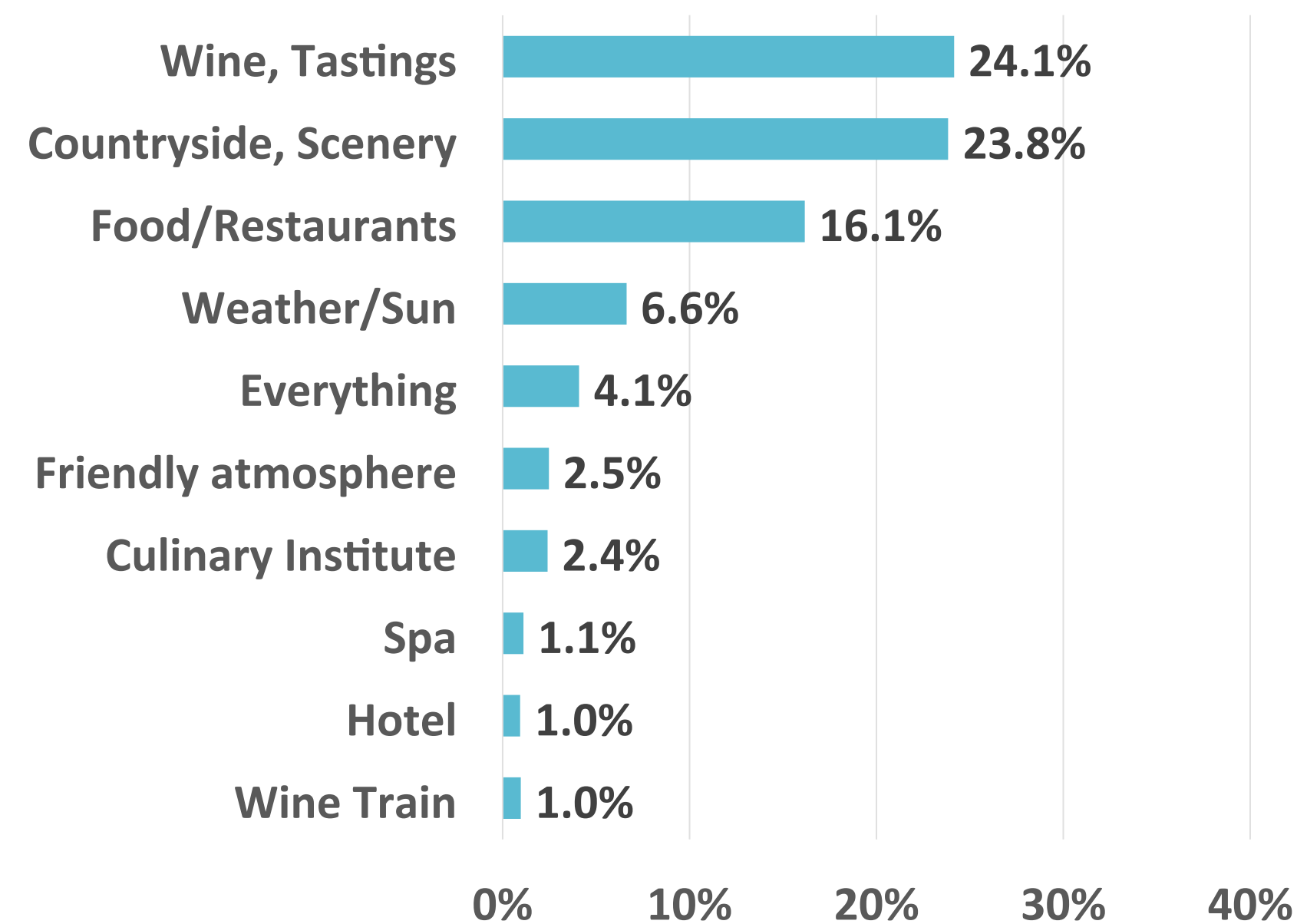
	Lodging Guest	Home Share Rental	VFR	Day Trip
Free winery map(s) and/or winery guide(s)	17.4%	21.4%	26.8%	18.2%
Free travel guide book(s) or brochures	14.4%	17.9%	28.2%	11.4%
Official Napa Valley Visitors Guide	7.0%	7.1%	7.0%	6.9%
Official Napa Valley destination website (www.VisitNapaValley.com)	4.9%	0.0%	2.8%	4.1%
Official Visit Napa Valley mobile app	0.9%	0.0%	2.8%	3.4%
Official Visit Napa Valley Facebook and/or Twitter feeds	2.3%	3.6%	5.6%	2.3%
Sample size:	430	28	71	710

Question: Which of the following tools did you use specifically to plan your trip before arriving and which will you use while in the Napa Valley area? (SELECT ALL THAT APPLY)

Most Liked Aspects of The Napa Valley

Visitors to Napa Valley most value the destination’s wine (24.1%), scenic countryside (23.8%) and culinary scene (16.1%). Surveyed visitors were asked, in an open-ended format, what they liked best about their experience in the Napa Valley. The chart and table below lists the top cited responses. In addition to the wine, scenery and food, 6.6 percent said the area’s good weather was the most liked aspect of their Napa Valley trip.

Chart 22: Top Most Liked Aspects of The Napa Valley



Base: All respondents. 1,014 responses (weighted).

Detail by Type of Visitor

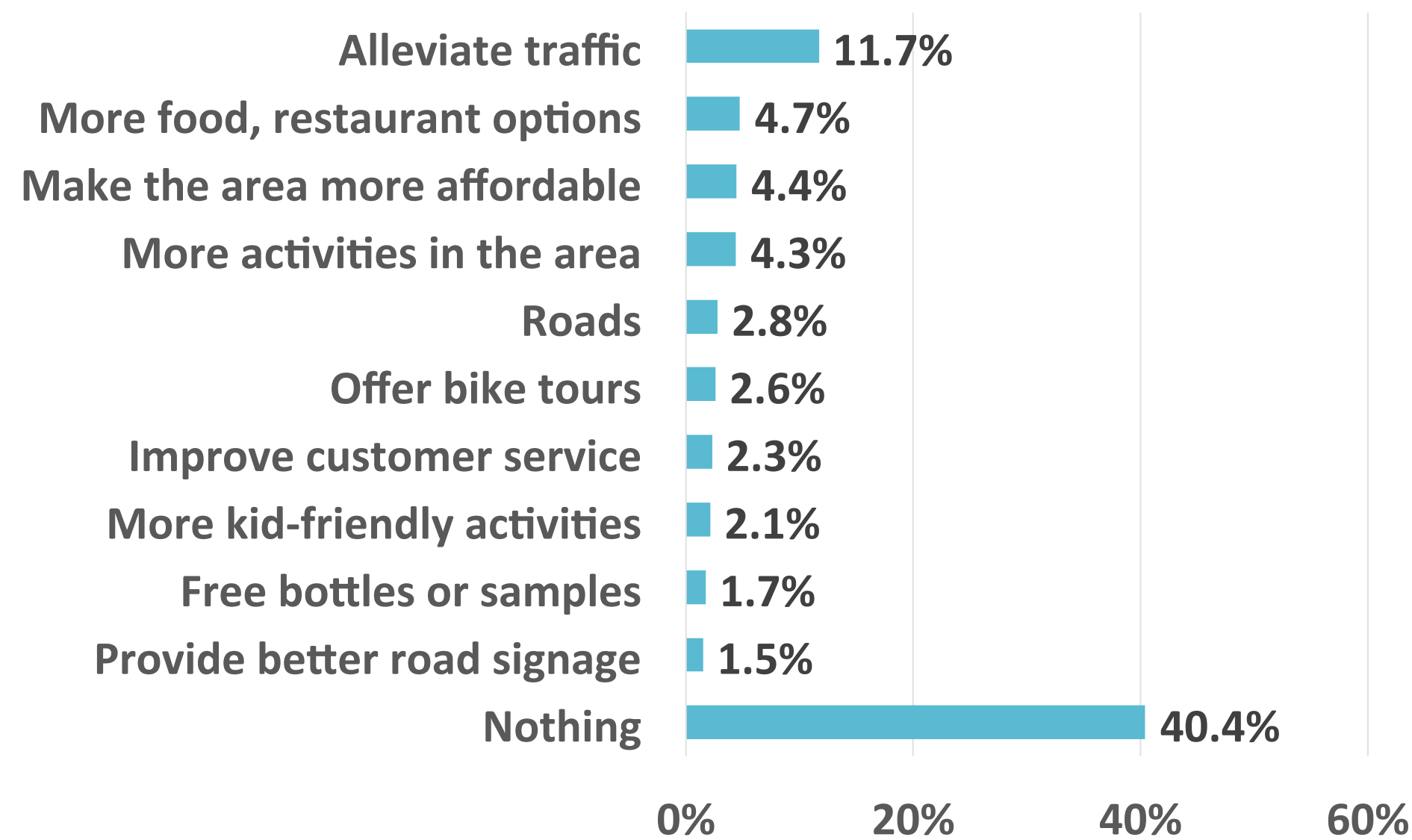
	Lodging Guest	Home Share Rental	VFR	Day Trip
Wine, Tastings	12.5%	26.1%	22.0%	27.3%
Countryside, Scenery	13.2%	39.1%	20.3%	26.5%
Food/Restaurants	26.1%	4.3%	11.9%	14.1%
Weather/Sun	5.5%	21.7%	16.9%	5.8%
Everything	8.1%	0.0%	0.0%	3.4%
Friendly atmosphere	2.6%	4.3%	1.7%	2.4%
Culinary Institution	5.1%	0.0%	1.7%	1.8%
Spa	5.1%	0.0%	0.0%	0.2%
Hotel	3.7%	0.0%	0.0%	0.3%
Wine Train	0.7%	0.0%	0.0%	1.1%
Sample size:	293	18	54	649

Question: What aspects of your experience in the Napa Valley do you like best?

Attractions/Services That Would Enhance The Napa Valley

When asked what attractions or services would have most enhanced visitors' experience in Napa Valley, four-in-ten respondents stated there was **"nothing" the destination needed (40.4%)**. Of the specific responses provided, alleviating traffic (11.7%), the addition of more food/restaurant options (4.7%), making the area more affordable (4.4%) and more activities in the area (4.3%) were the most desired services that would have enhanced the Napa Valley experience.

Chart 23: Attractions/Services That Would Enhance The Napa Valley



Base: All respondents. 627 responses (weighted).

Detail by Type of Visitor

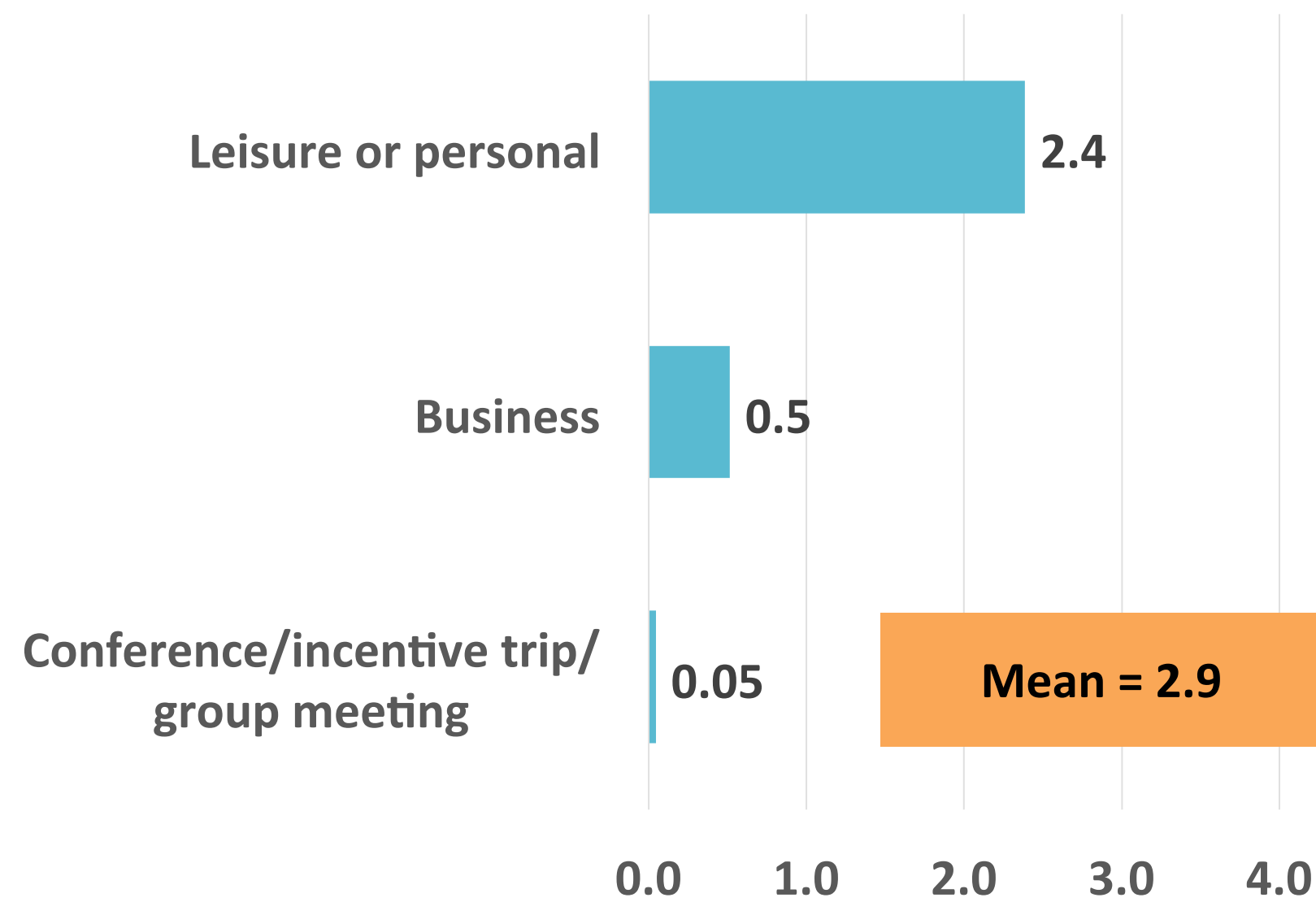
	Lodging Guest	Home Share Rental	VFR	Day Trip
Alleviate traffic	16.8%	18.8%	9.3%	14.2%
More food, restaurant options	7.3%	0.0%	2.3%	4.5%
Make the area more affordable	5.8%	12.5%	7.0%	3.6%
More activities in the area	2.2%	0.0%	7.0%	4.7%
Offer bike tours	2.2%	6.3%	0.0%	2.8%
Improve customer service	0.7%	6.3%	2.3%	2.5%
More kid-friendly activities	0.7%	0.0%	2.3%	2.5%
Free bottles or samples	0.7%	0.0%	2.3%	2.0%
Provide better road signage	0.7%	0.0%	2.3%	1.7%
Nothing	33.6%	56.2%	48.8%	40.8%
Sample size:	165	16	43	403

Question: In your opinion, what attractions or services would most enhance the Napa Valley?

Visits to Napa Valley in Past Twelve Months

The average visitor has made 2.9 trips to Napa Valley in the past twelve months. This primarily consists of 2.4 leisure trips, followed by 0.5 business trips and 0.05 conference or other group meeting trips. VFRs visit Napa Valley more frequently compared to the other visitor segments (3.4 trips on average vs. 2.8 for lodging guests, 1.3 for home share rental visitors and 2.8 for day trip visitors).

Chart 24: Number of Trips to The Napa Valley



Base: All respondents. 1,034 responses (weighted).

Detail by Type of Visitor

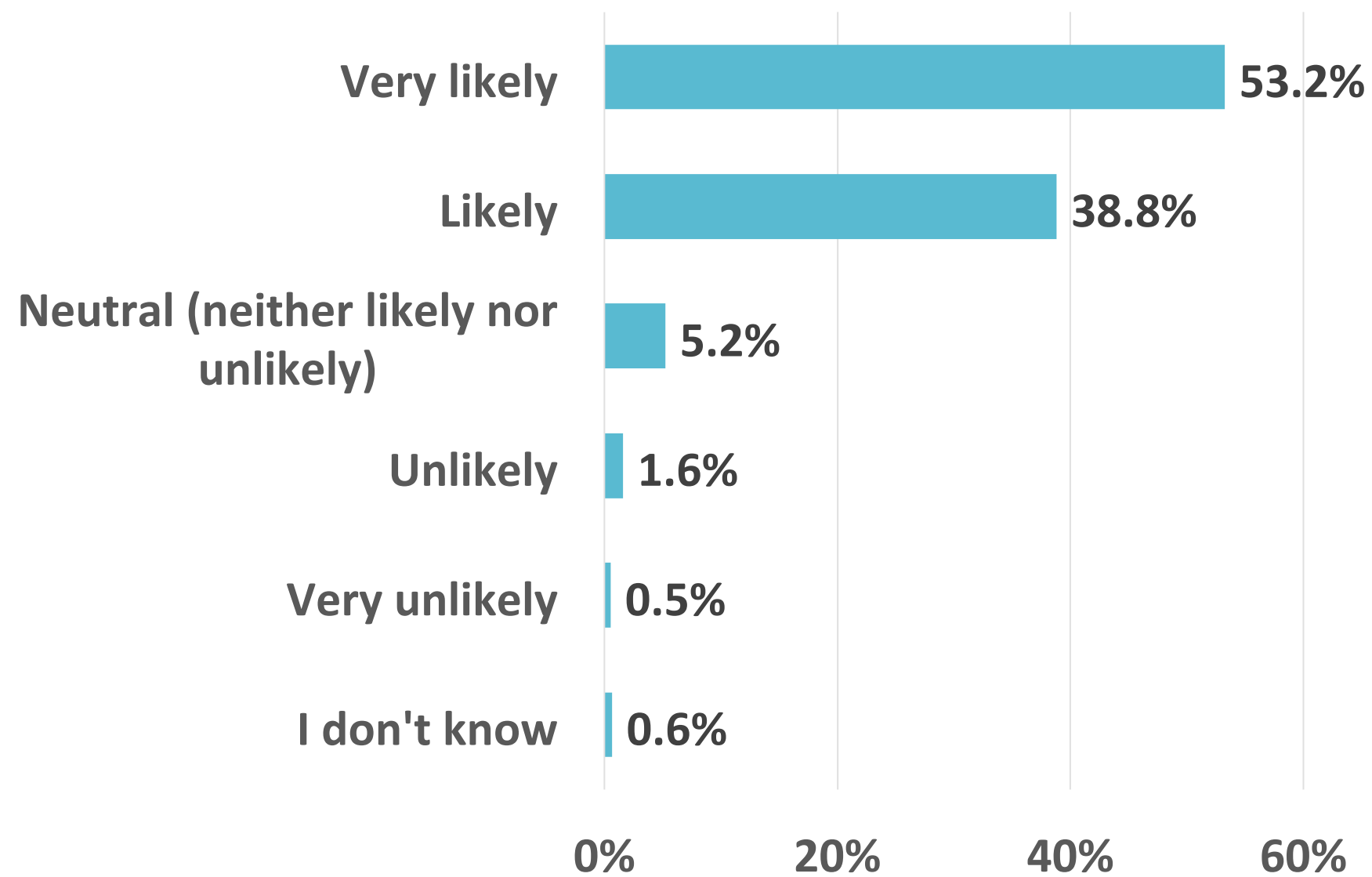
	Lodging Guest	Home Share Rental	VFR	Day Trip
Leisure or personal	2.0	1.1	2.4	2.5
Business	0.7	0.2	0.9	0.3
Conference/incentive trip/group meeting	0.1	0.0	0.0	0.0
Mean # of Trips:	2.8	1.3	3.4	2.8
Sample size:	306	26	68	634

Question: Including this trip, how many visits to the Napa Valley have you made in the past twelve (12) months for each of the following reasons?

Likelihood to Return to The Napa Valley

Nearly all Napa Valley visitors surveyed in 2016 report a high likelihood to return to Napa Valley. In total, 92.0 percent of respondents said they were “likely” (38.8%) or “very likely” (53.2%) to visit Napa Valley again.

Chart 25: Likelihood to Return to The Napa Valley



Base: All respondents. 1,056 responses (weighted).

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Very likely	68.9%	37.5%	60.9%	48.1%
Likely	25.4%	54.2%	31.3%	43.2%
Neutral (neither likely nor unlikely)	3.8%	8.3%	3.1%	5.7%
Unlikely	0.9%	0.0%	3.1%	1.7%
Very unlikely	0.0%	0.0%	1.6%	0.6%
I don't know	0.9%	0.0%	0.0%	0.6%
Sample size:	338	24	64	630

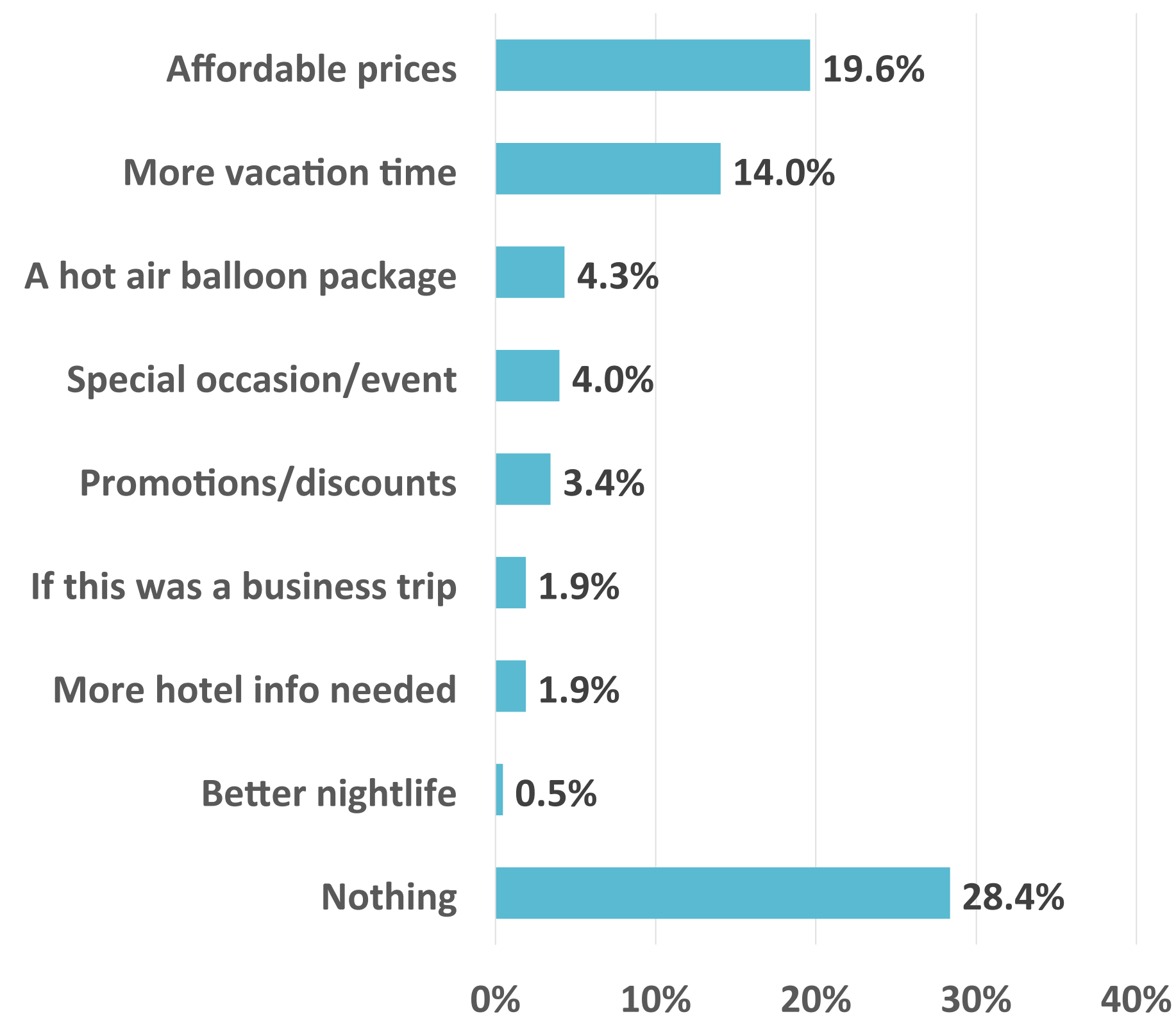
Question: How likely are you to return to the Napa Valley? (Select one)

Non-Hotel Visitors – Motivation for Staying in a Napa Valley Hotel

Nearly 30 percent of non-hotel visitors stated that nothing could be done to motivate them to stay overnight in a Napa Valley hotel on their trip (28.4%). Non-hotel visitors were asked what would have motivated them to stay overnight in a Napa Valley hotel on this trip. For the portion that could be influenced, the top motivations listed were more affordable prices (19.6%) and more vacation time (14.0%). In addition, this group also said they would be motivated to stay in a Napa Valley hotel if a hot air balloon and hotel package were available (4.3%) or if there was a special occasion or event in town (4.0%).

Question: What would have motivated you to stay overnight in a Napa Valley hotel on this trip? Base: Respondents who did not stay overnight in a Napa Valley hotel. 441 responses (weighted).

Chart 26: Non Hotel Visitors – Motivation for Staying in a Napa Valley Hotel

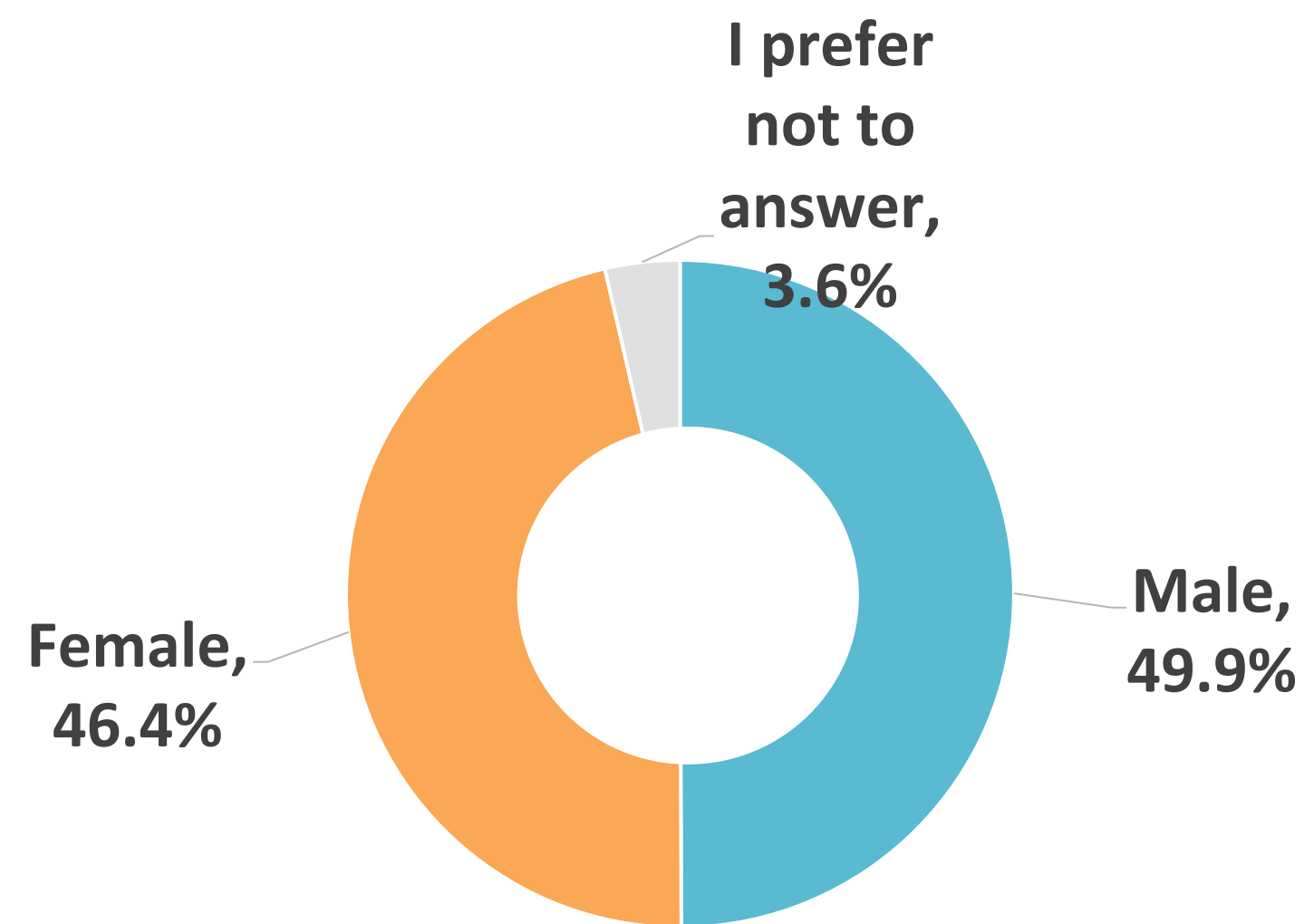


RESPONDENT DEMOGRAPHICS

Gender

The survey sample collected nearly had an even gender split. 49.9 percent were male and 46.4 percent were female. It should be noted this is this data reflects the proportion of persons actually completing the survey, not the composition of visitors by gender. For a more representative view of the gender mix of Napa visitors, please refer to page 39.

Chart 27: Gender



Base: All respondents. 1,108 responses (weighted).

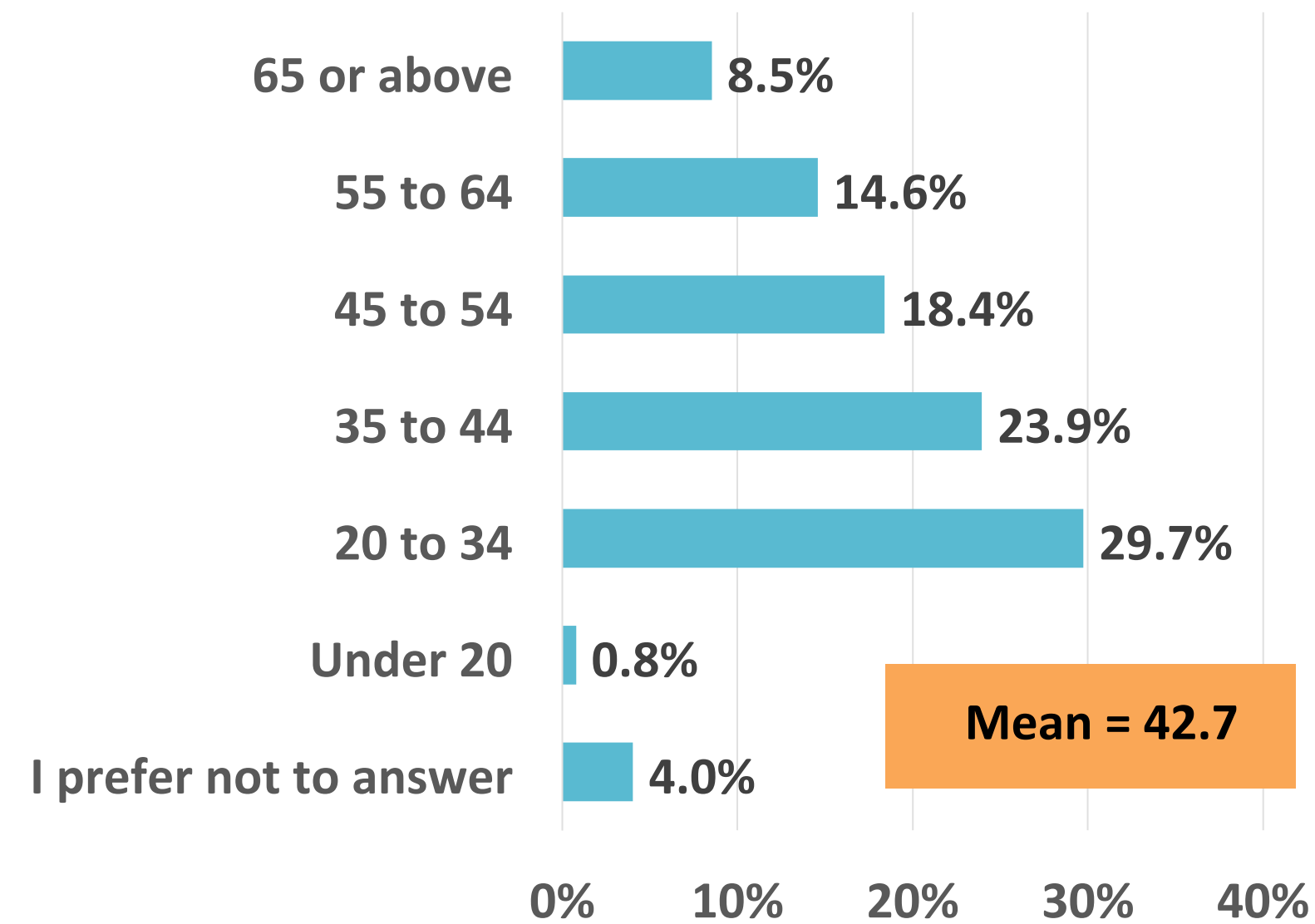
Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Male	42.9%	40.7%	40.6%	52.8%
Female	55.3%	51.9%	55.1%	43.1%
I prefer not to answer	1.8%	7.4%	4.3%	4.0%
Sample size:	340	27	69	670

Question: What is your gender?

The average age of visitors surveyed was 42.7 years. Over 40 percent of visitors surveyed were Gen Xers (42.7%), while three-in-ten were Millennials (30.5%). Lodging guest are typically older than both VFR and day-trip visitors (40.3 (49.9 years vs. 43.6 and 40.3 years, respectively).

Chart 28: Age



Base: All respondents. 1,108 responses (weighted).

Detail by Type of Visitor

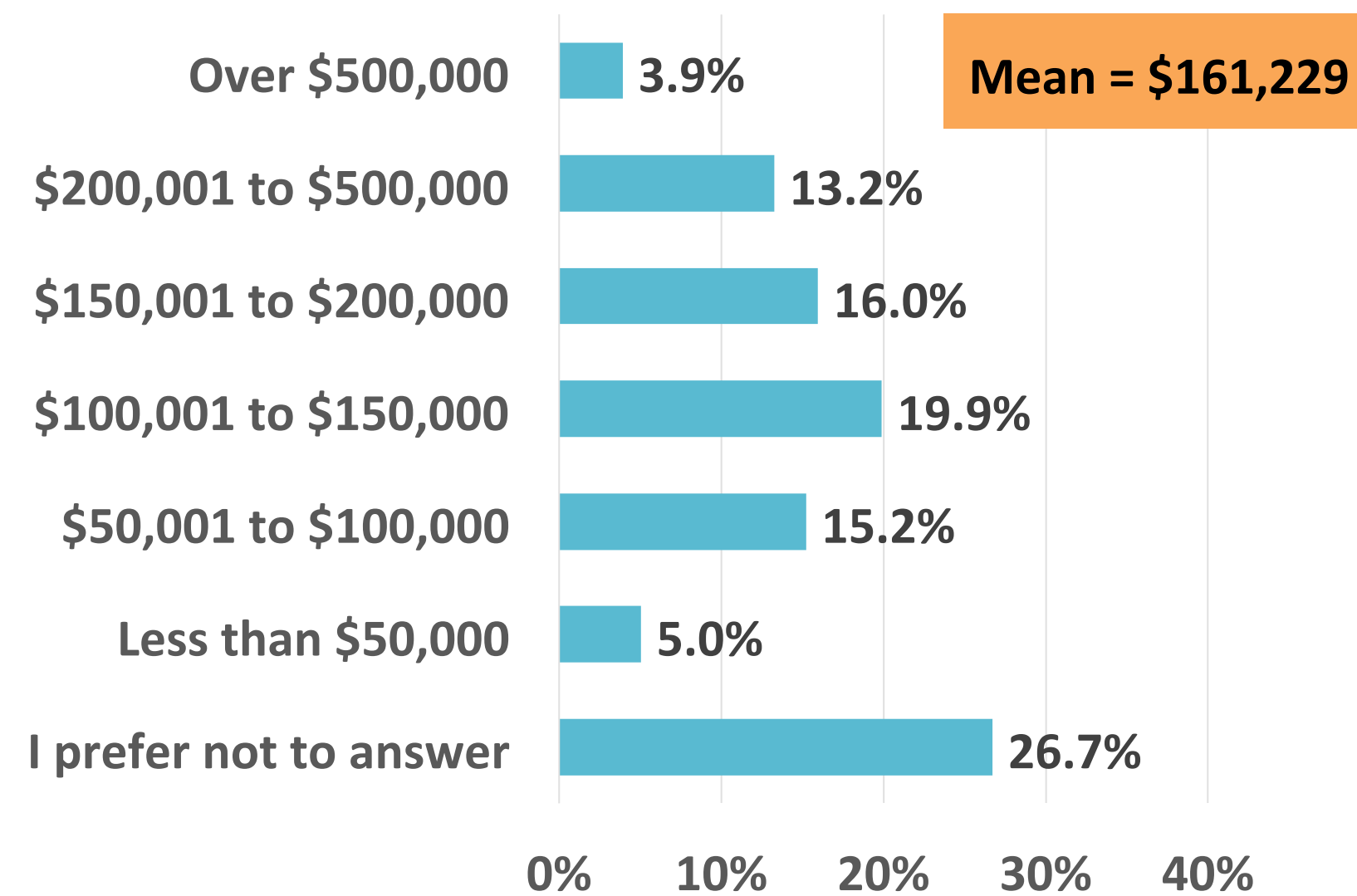
	Lodging Guest	Home Share Rental	VFR	Day Trip
65 or above	16.8%	15.4%	11.4%	5.7%
55 to 64	29.4%	30.8%	12.9%	9.9%
45 to 54	19.4%	7.7%	21.4%	18.2%
35 to 44	17.4%	15.4%	21.4%	26.3%
20 to 34	15.0%	23.1%	27.1%	34.5%
Under 20	0.3%	0.0%	1.4%	0.9%
I prefer not to answer	1.8%	7.7%	4.3%	4.6%
Mean	49.8	48.1	43.6	40.3
Sample size:	340	26	70	670

Question: Which is your age?

Annual Household Income

Visitors to the Napa Valley are affluent with an average annual household income of \$161,229. Home share rental visitors and lodging guests reported the highest average household income (\$244,445 and \$192,927, respectively).

Chart 29: Annual Household Income



Base: All respondents. 1,102 responses (weighted).

Detail by Type of Visitor

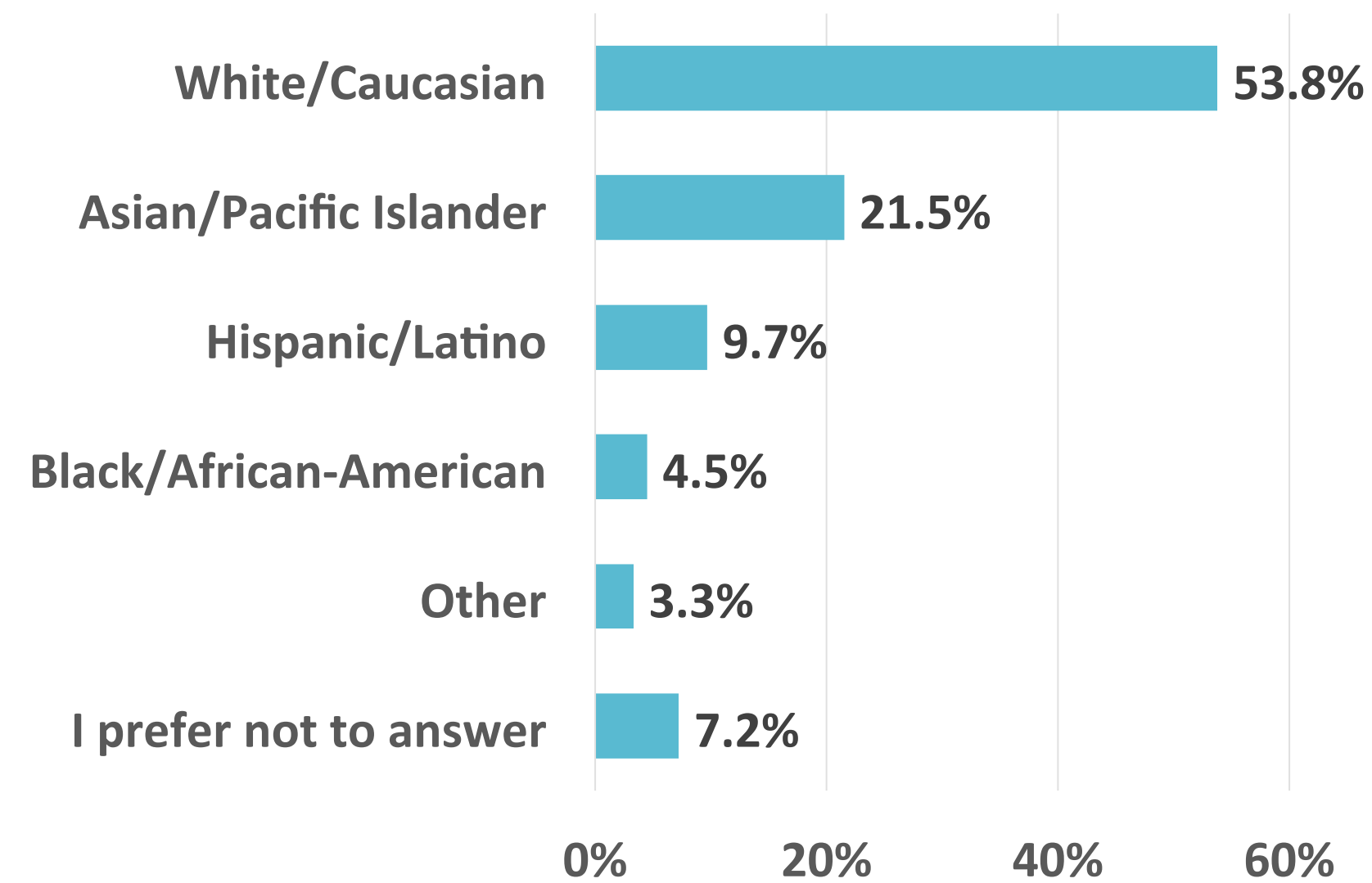
	Lodging Guest	Home Share Rental	VFR	Day Trip
Over \$500,000	8.6%	4.0%	5.6%	2.4%
\$200,001 to \$500,000	21.9%	32.0%	11.3%	10.3%
\$150,001 to \$200,000	18.3%	28.0%	15.5%	15.0%
\$100,001 to \$150,000	15.1%	12.0%	29.6%	20.8%
\$50,001 to \$100,000	14.8%	0.0%	11.3%	16.0%
Less than \$50,000	2.4%	0.0%	2.8%	6.1%
I prefer not to answer	18.9%	24.0%	23.9%	29.2%
Mean:	\$192,143	\$244,445	\$160,000	\$149,288
Sample size:	338	25	71	667

Question: Which of the following best describes the combined annual income of all members of your household?

Ethnicity

Over half of all visitors surveyed identify as Caucasian (53.8%), while 39.0 percent identify as other ethnicities. The largest non-Caucasian visitor groups were Asian, Pacific Islander (21.5%) and Latino/Hispanic (9.7%).

Chart 30: Ethnicity



Base: All respondents. 1,097 responses (weighted).

Detail by Type of Visitor

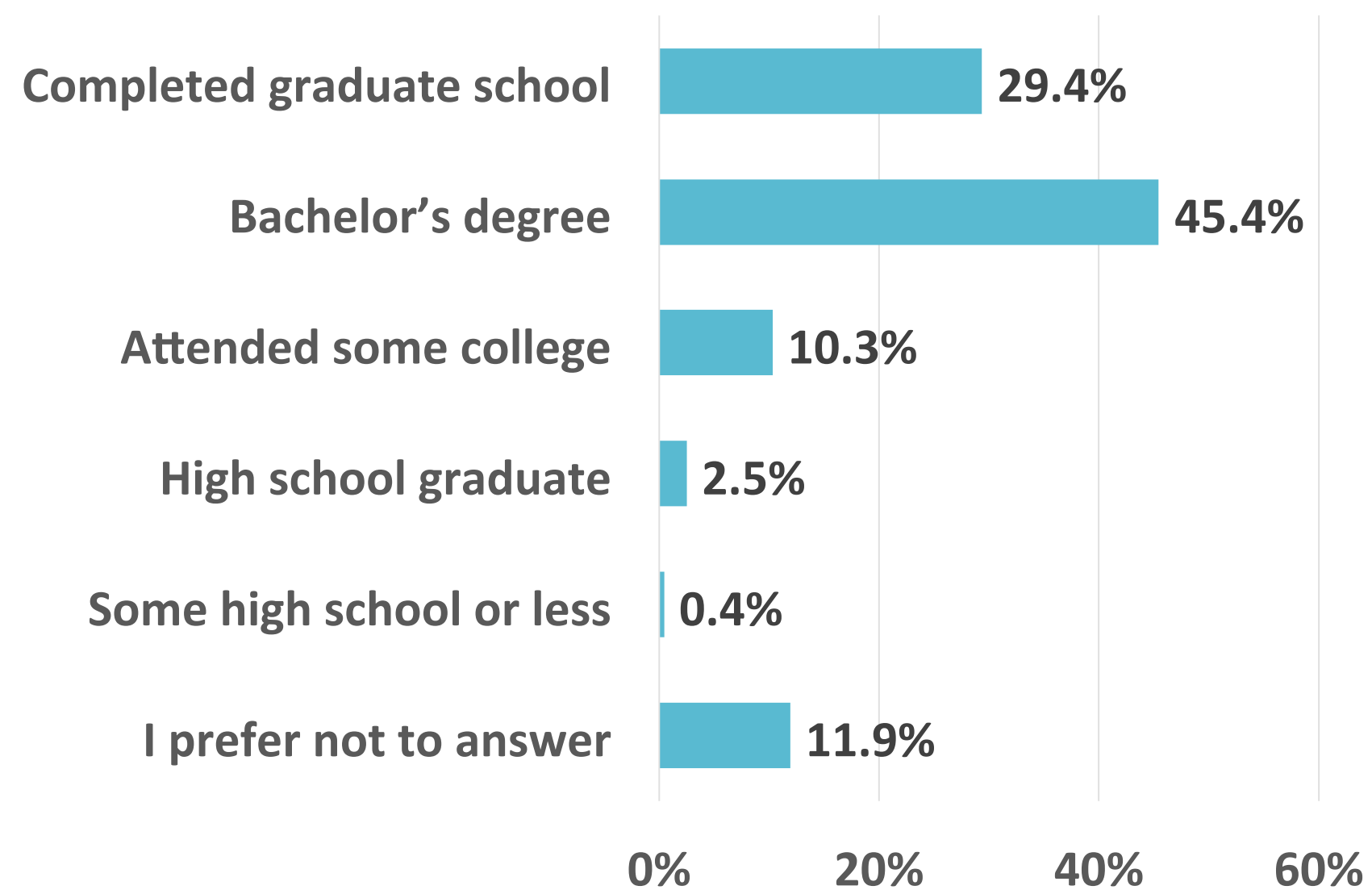
	Lodging Guest	Home Share Rental	VFR	Day Trip
White/Caucasian	76.6%	76.9%	65.2%	45.5%
Asian/Pacific Islander	8.6%	11.5%	10.1%	26.4%
Hispanic/Latino	5.0%	0.0%	5.8%	11.6%
Black/African-American	2.7%	0.0%	2.9%	5.3%
Other	1.8%	3.8%	2.9%	3.8%
I prefer not to answer	5.3%	7.7%	13.0%	7.4%
Sample size:	338	26	69	662

Question: Which best describes your race or ethnic background?

Education

Napa Valley visitors are highly educated. Nearly three-quarters of all visitors surveyed hold a bachelor’s degree (74.8%), including 29.4 percent who have completed graduate school.

Chart 31: Education



Base: All respondents. 1,105 responses (weighted).

Detail by Type of Visitor

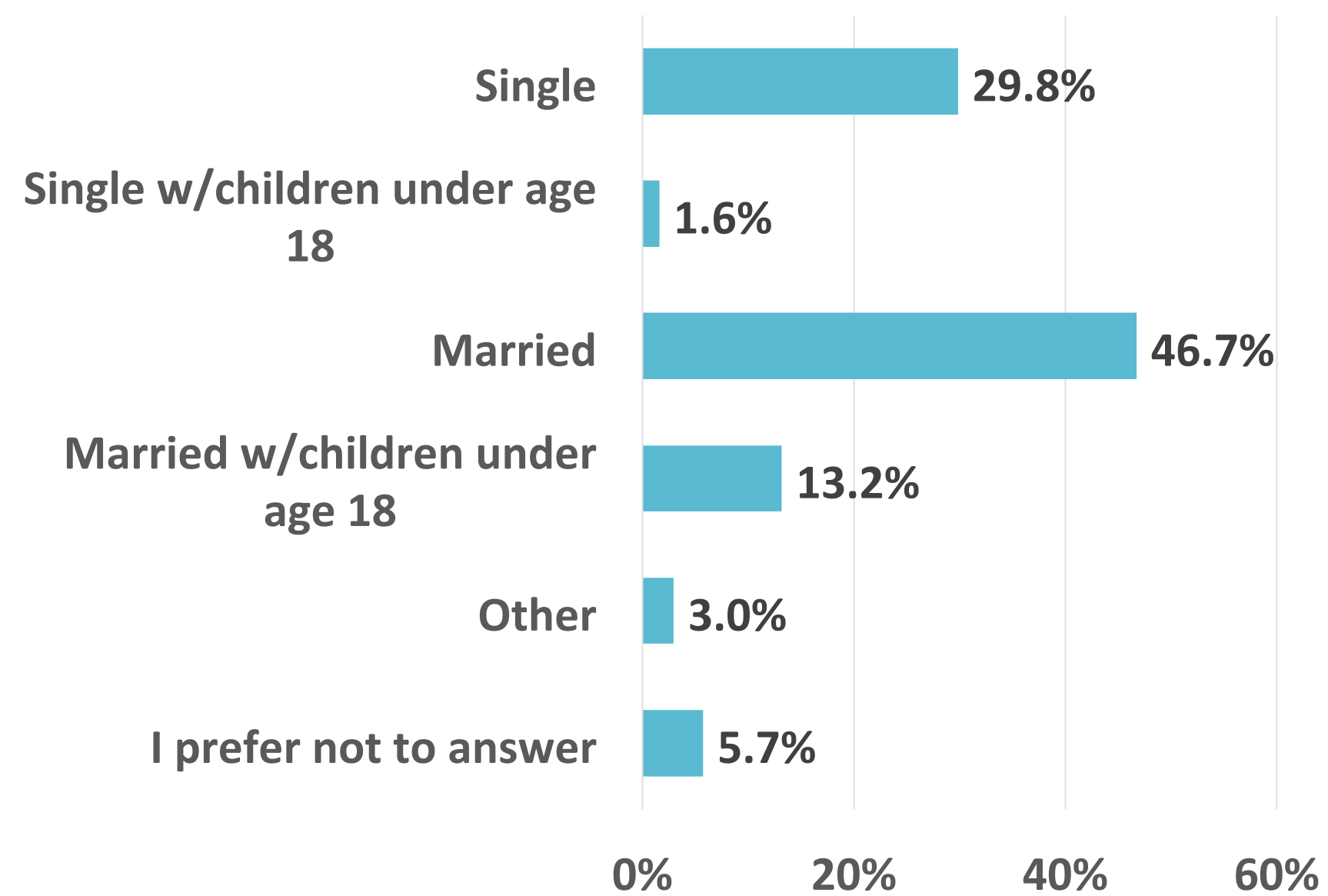
	Lodging Guest	Home Share Rental	VFR	Day Trip
Completed graduate school	37.1%	44.4%	36.8%	26.2%
Bachelor's degree	41.2%	37.0%	44.1%	47.0%
Attended some college	12.9%	7.4%	8.8%	9.7%
High school graduate	0.9%	0.0%	1.5%	3.1%
Some high school or less	0.6%	0.0%	0.0%	0.4%
I prefer not to answer	7.4%	11.1%	8.8%	13.5%
Sample size:	340	27	68	668

Question: Which of the following best represents the highest level of formal education you have completed?

Marital Status

In total, 60 percent of Napa Valley visitors surveyed are married (59.9%), while 31.4 percent are single. In total, 14.8 percent have children under the age of 18. Lodging guests have a larger share of those who are married (77.8%) vs. day trip visitors (54.4%).

Chart 32: Marital Status



Base: All respondents. 1,090 responses (weighted).

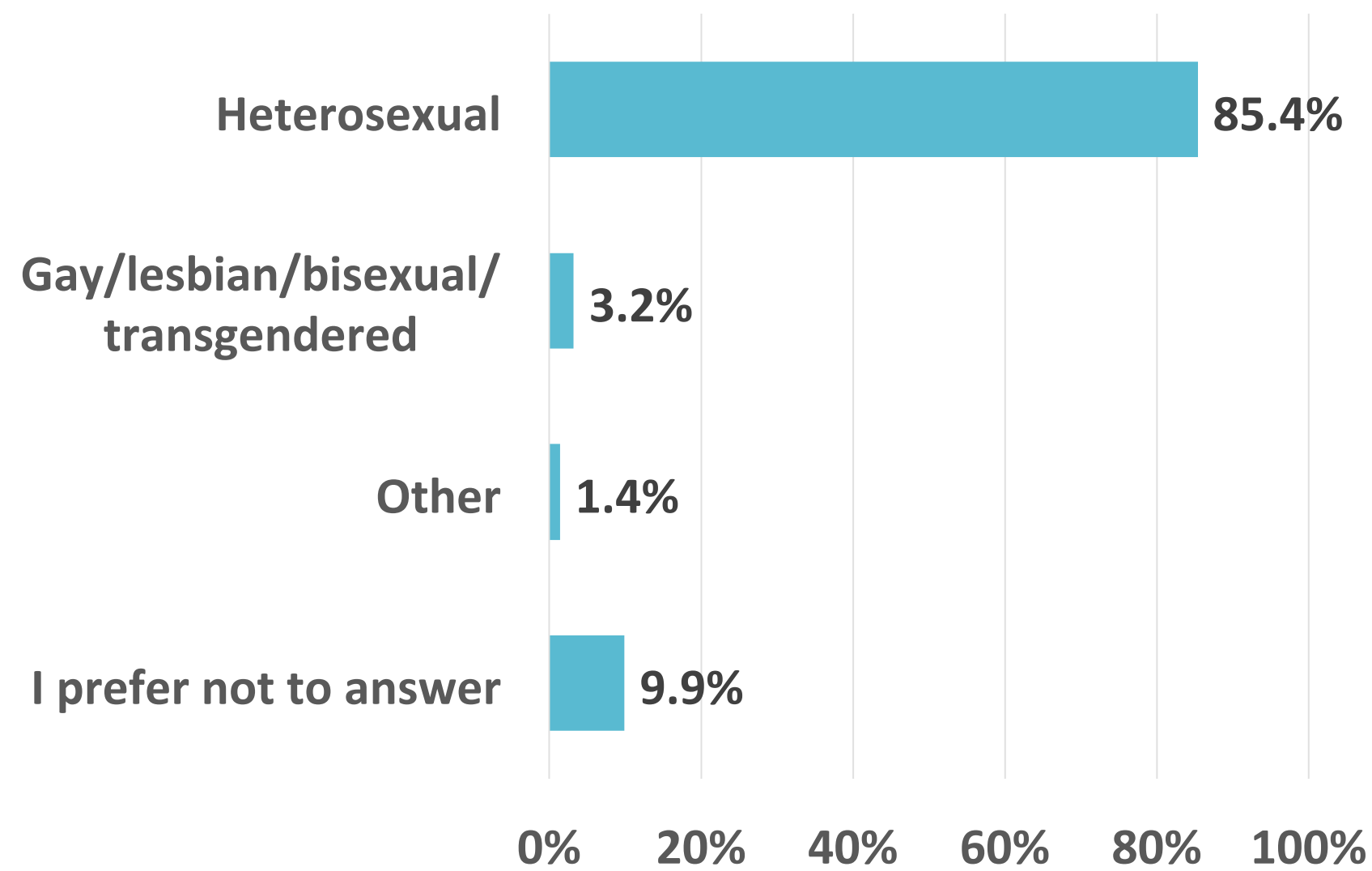
Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
Single	15.9%	11.5%	30.0%	34.3%
Single w/children under age 18	1.5%	0.0%	1.4%	1.7%
Married	67.1%	57.7%	44.3%	40.7%
Married w/children under age 18	10.7%	23.1%	12.9%	13.7%
Other	1.8%	0.0%	5.7%	3.2%
I prefer not to answer	3.0%	7.7%	5.7%	6.5%
Sample size:	328	26	70	664

Question: Which of the following best describes your marital status?

The majority of survey respondents who visited Napa Valley identify as heterosexual (85.4%) and 3.2 percent of visitors surveyed identify as LGBT.

Chart 33: LGBT



Base: All respondents. 1,102 responses (weighted).

Detail by Type of Visitor

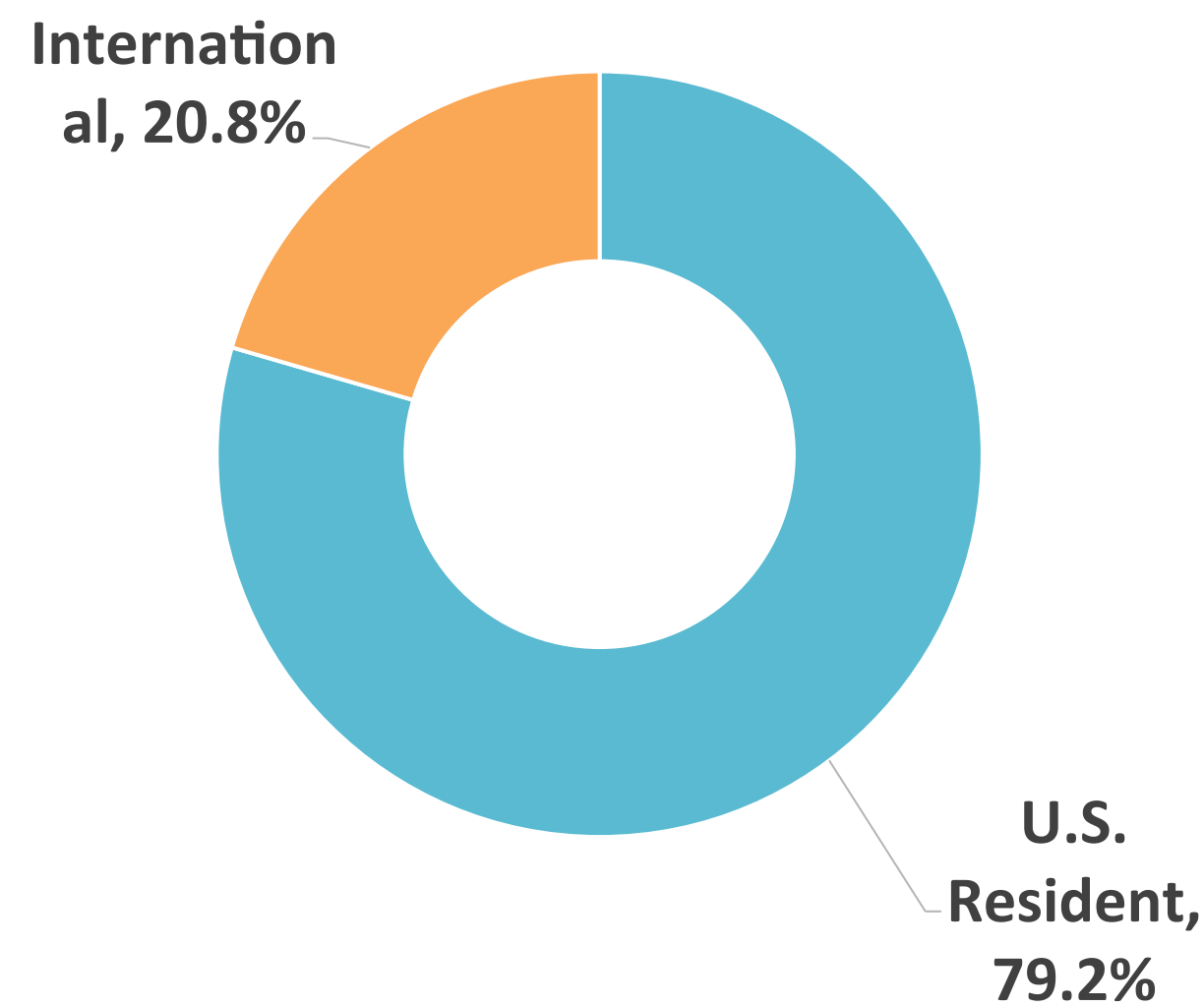
	Lodging Guest	Home Share Rental	VFR	Day Trip
Heterosexual	89.1%	92.3%	85.9%	84.0%
Gay/lesbian/bisexual/transgendered	2.9%	0.0%	2.8%	3.5%
Other	0.3%	0.0%	1.4%	1.8%
I prefer not to answer	7.7%	7.7%	9.9%	10.7%
Sample size:	339	26	71	664

Question: Which best describes you?

Point of Origin: Country of Residence

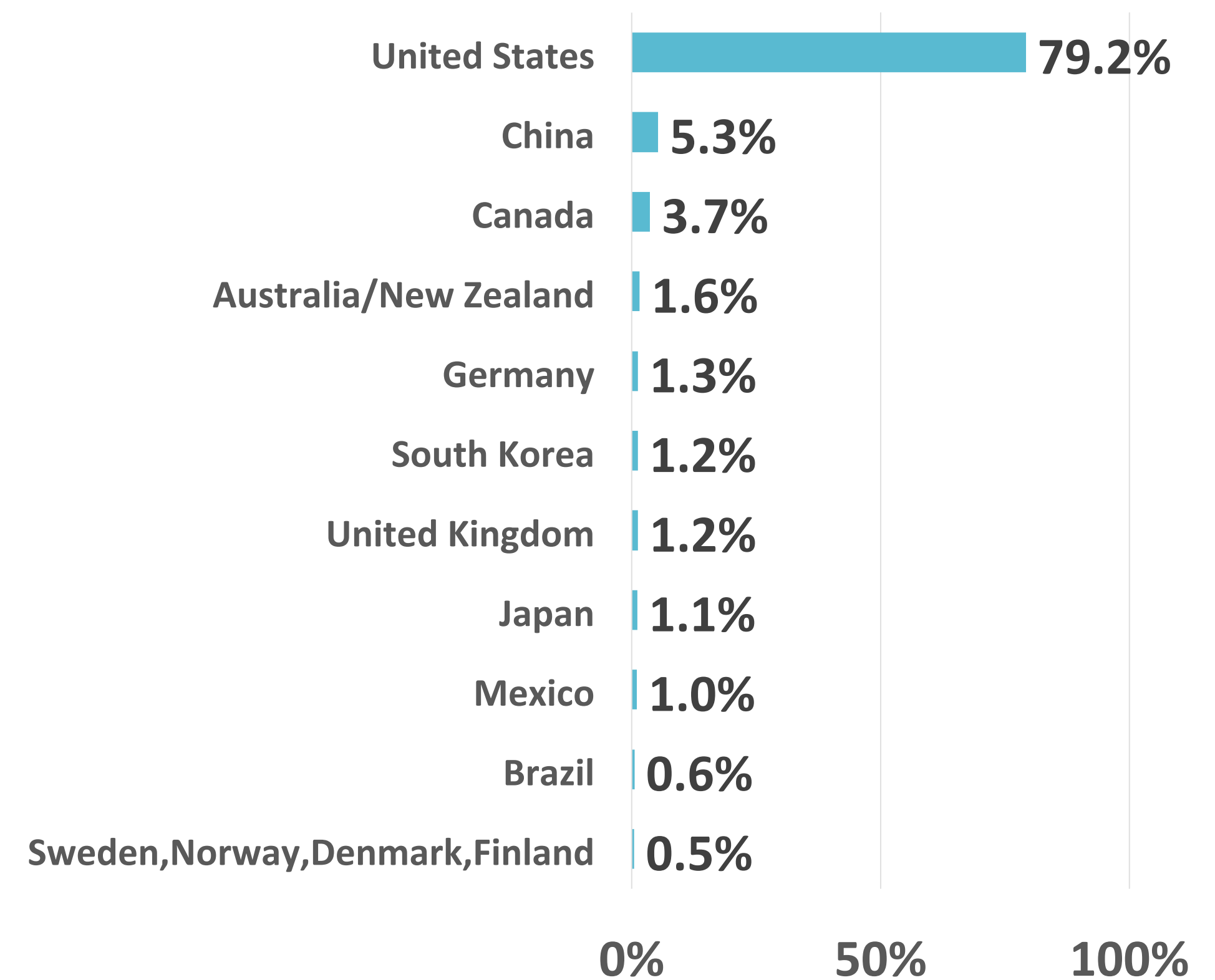
In total, 79.5 percent of visitors surveyed were domestic residents and 20.5 percent were international. The top international markets represented in the sample are China (5.3%) and Canada (3.7%).

Chart 34: Point of Origin: U.S. vs. International



Question: Where do you currently live?

Chart 35: Top Countries of Residence



Base: All respondents. 1,154 responses

Point of Origin: Country of Residence – Full Data by Place of Stay

Detail by Place of Stay

	Total	Hotel Guest	Home Share Rental	VFR	Day Trip
United States	79.2%	81.7%	85.7%	77.1%	78.3%
China	5.3%	3.0%	7.1%	4.3%	6.0%
Canada	3.7%	3.0%	7.1%	8.6%	3.3%
Germany	1.3%	0.7%	0.0%	1.4%	1.5%
South Korea	1.2%	0.3%	0.0%	0.0%	1.6%
United Kingdom	1.2%	2.3%	0.0%	2.9%	0.9%
Japan	1.1%	2.0%	0.0%	1.4%	0.9%
Mexico	1.0%	0.3%	0.0%	0.0%	1.3%
Australia	0.9%	1.3%	0.0%	0.0%	0.9%
New Zealand	0.7%	0.0%	0.0%	1.4%	0.9%
Brazil	0.6%	0.7%	0.0%	0.0%	0.6%
Sweden,Norway,Denmark,Finland	0.5%	1.0%	0.0%	0.0%	0.4%
Italy	0.4%	0.0%	0.0%	0.0%	0.6%
France	0.4%	0.3%	0.0%	0.0%	0.4%
India	0.4%	0.3%	0.0%	0.0%	0.4%
Spain	0.2%	0.7%	0.0%	0.0%	0.1%
Taiwan	0.2%	0.0%	0.0%	0.0%	0.3%
Costa Rica	0.2%	0.0%	0.0%	1.4%	0.1%
Phillipines	0.2%	0.0%	0.0%	1.4%	0.1%
Singapore	0.2%	0.3%	0.0%	0.0%	0.1%
Sample size:	1,154	218	23	60	846

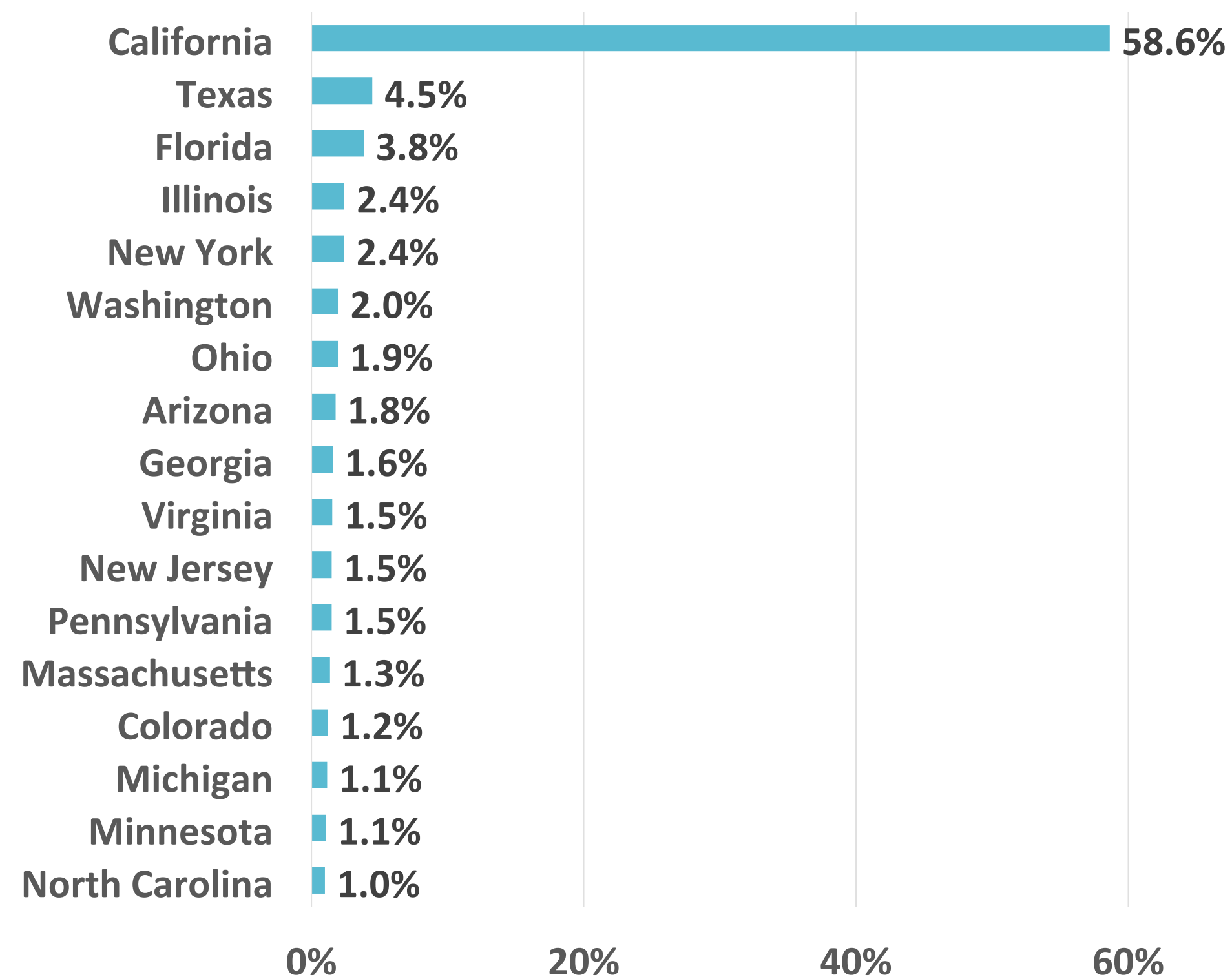
Question: Where do you currently live?

Base: All respondents. 1,154 responses

Point of Origin: State of Residence

Nearly six-in-ten domestic Napa Valley area visitors surveyed were California residents (58.6%). In total, 41.4 percent of survey respondents were out-of-state residents with top visitation from Texas (4.5%), Florida (3.8%), Illinois (2.4%), New York (2.4%) and Washington (2.0%).

Chart 36: Point of Origin: Top States



Base: All domestic respondents. 1,081 responses (weighted).

Detail by Type of Visitor

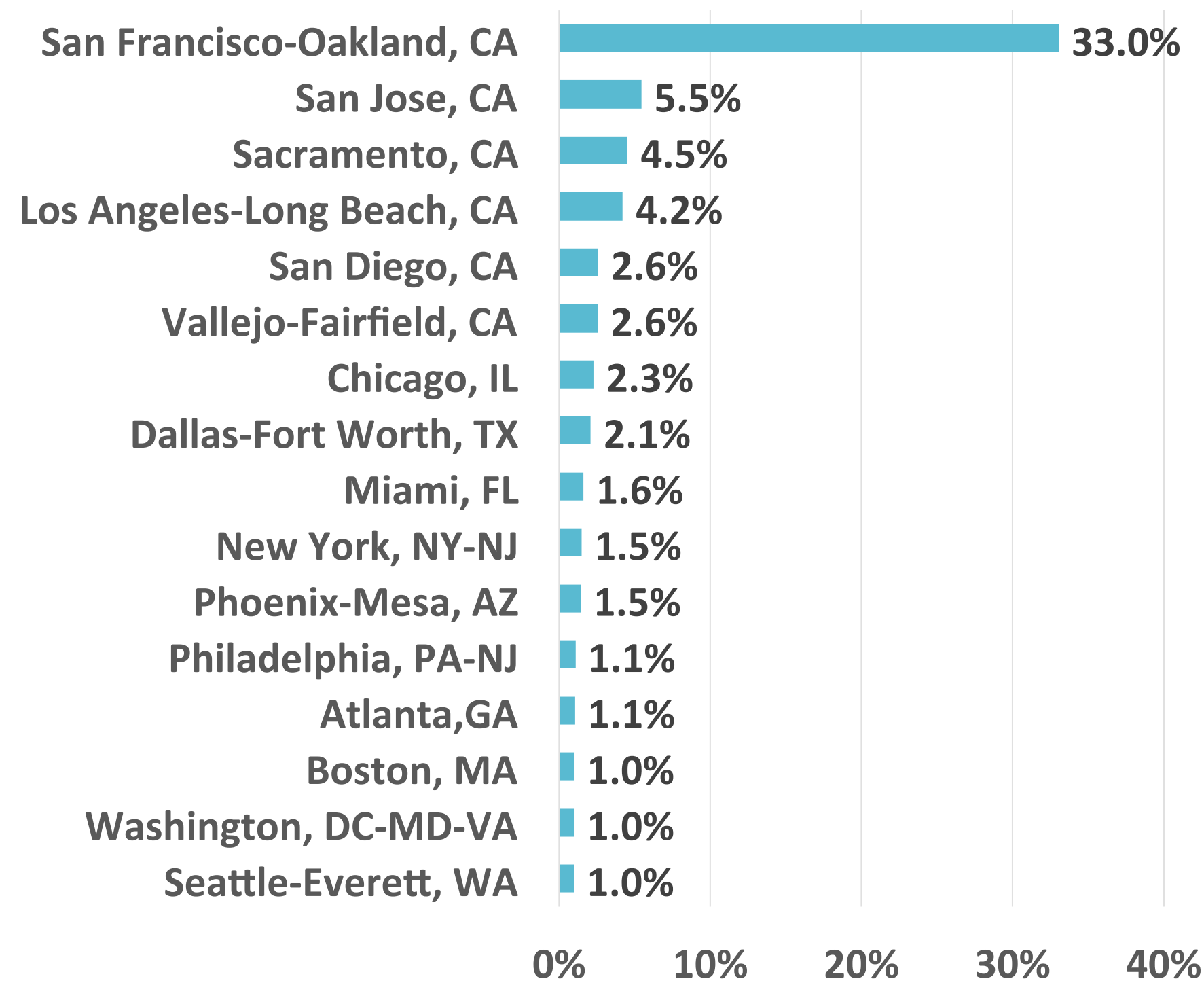
	Lodging Guest	Home Share Rental	VFR	Day Trip
California	49.0%	30.4%	44.2%	65.4%
Texas	5.6%	13.0%	3.8%	3.7%
Florida	5.6%	13.0%	7.7%	2.4%
Illinois	4.1%	0.0%	1.9%	1.7%
New York	3.0%	4.3%	7.7%	1.7%
Washington	1.9%	4.3%	3.8%	1.7%
Ohio	1.9%	0.0%	3.8%	1.9%
Arizona	1.3%	4.3%	0.0%	2.0%
Georgia	2.2%	4.3%	0.0%	1.3%
Virginia	1.1%	13.0%	3.8%	1.3%
New Jersey	2.2%	0.0%	0.0%	1.3%
Pennsylvania	1.7%	0.0%	0.0%	1.5%
Massachusetts	0.4%	4.3%	7.7%	1.3%
Colorado	2.4%	0.0%	0.0%	0.7%
Michigan	2.2%	0.0%	0.0%	0.7%
Minnesota	1.3%	0.0%	1.9%	0.9%
North Carolina	1.1%	0.0%	1.9%	0.9%
Sample size:	465	23	52	538

Question: What is your zip/postal code?

Point of Origin: MSA

In 2016, one-in-three Napa Valley area visitors surveyed lived in the San Francisco-Oakland, CA MSA (33.0%)—mainly driven by day-trip visitors (39.9%). Top MSA feeder markets outside the San Francisco-Oakland, CA MSA market were San Jose, CA MSA (5.5%), Sacramento, CA MSA (4.5%) and Los Angeles-Long Beach, CA MSA (4.2%). Top out-of-state domestic MSAs include Chicago, IL MSA (2.3%) and Dallas-Fort Worth, TX MSA (2.1%).

Chart 37: Point of Origin: MSA



Base: All domestic respondents. 1,027 responses (weighted).

Detail by Type of Visitor

	Lodging Guest	Home Share Rental	VFR	Day Trip
San Francisco-Oakland, CA	23.0%	4.8%	20.0%	39.9%
San Jose, CA	2.3%	9.5%	2.0%	7.2%
Sacramento, CA	5.0%	0.0%	6.0%	4.3%
Los Angeles-Long Beach, CA	4.1%	4.8%	6.0%	4.1%
San Diego, CA	3.0%	9.5%	4.0%	2.1%
Vallejo-Fairfield, CA	0.5%	0.0%	0.0%	3.9%
Chicago, IL	3.9%	0.0%	2.0%	1.6%
Dallas-Fort Worth, TX	3.4%	4.8%	2.0%	1.4%
Miami, FL	2.3%	9.5%	0.0%	1.2%
New York, NY-NJ	1.1%	0.0%	4.0%	1.6%
Phoenix-Mesa, AZ	1.1%	0.0%	0.0%	1.8%
Philadelphia, PA-NJ	1.1%	0.0%	0.0%	1.2%
Atlanta, GA	1.8%	0.0%	0.0%	0.8%
Boston, MA	0.2%	4.8%	6.0%	1.0%
Washington, DC-MD-VA	1.1%	4.8%	2.0%	0.8%
Seattle-Everett, WA	1.1%	4.8%	0.0%	0.8%
Sample size:	440	21	50	514

Question: What is your zip/postal code?

Place of Stay, Major International Feeder Markets

The majority of Napa Valley’s international visitors are in the destination on a day trip. The table at right, shows the reported place of stay for visitors from major Napa Valley’s major international feeder markets. For each country, the proportion of visitors staying overnight (as opposed to day tripping from outside Napa Valley) is shown in the first line. In total, 17.6 percent of Chinese visitors to Napa Valley reported staying the night. Of these visitors, 61.0 percent stayed in a Napa Valley hotel, motel, inn or B&B.

The reader should use caution with this data and understand the sample sizes used here are small.

Chart 38: Point of Origin: MSA

	China	Canada	Europe	Japan / S. Korea	Australia / New Zealand
Stayed overnight in Napa Valley	17.6%	33.2%	28.5%	22.2%	20.3%
Hotel, motel, inn or B&B	61.0%	46.7%	82.0%	85.7%	77.4%
Private residence (i.e. with friends/family)	23.8%	36.4%	18.0%	14.3%	22.6%
Vacation home/room rental	15.3%	11.7%	0.0%	0.0%	0.0%
Other lodging	0.0%	5.2%	0.0%	0.0%	0.0%
Total market sample size:	61	42	50	27	19

Questions: Are you staying overnight anywhere in the Napa Valley on this visit? Where are you staying overnight in Napa Valley?