



DESTINATION ANALYSTS

Visit Napa Valley
2012 Napa Valley Visitor Profile
REPORT OF FINDINGS

Project Overview



Methodology

This report presents the findings of a year-long visitor profile study conducted by Destination Analysts on behalf of Visit Napa Valley. The research consisted of two parts: (1) a self-administered survey of Napa Valley lodging guests, and (2) an intercept survey of day-trip visitors and visiting friends or relatives staying overnight in private homes (VFRs). These two surveys were conducted over the course of the year, with a total of 1,994 fully completed surveys collected. A brief description of each survey effort follows:

Lodging Guest Survey – Over the course of the year, 56 Napa Valley lodging properties participated in the visitor profile study by distributing a brief self-administered survey to all departing guests for two weeks each quarter. These surveys were completed by guests and returned via pre-paid mail to Destination Analysts. A total of 1,129 fully completed surveys were collected throughout 2012.

Visitor Intercept Survey – Over the course of the year, Destination Analysts staff used an identical questionnaire to interview a random sample of visitors at locations around Napa Valley. This survey collected data only from day-trip visitors and visiting friends or relatives staying overnight in private Napa County homes (VFRs). A total of 865 visitors were interviewed in this effort.

In addition, a supplemental **Telephone Survey of Napa County Homes** was conducted at the end of the year to quantify the number of VFRs who stayed overnight in a private home. This survey was administered to 300 randomly selected homes in Napa County.

Project Overview

Methodology (continued)



The data collected in these three surveys (Lodging Guest Survey, Visitor Intercept Survey and Telephone Survey of Napa County Homes) is weighted to form the overall visitor profile presented in this report.

In brief, the data collected in the surveys was used to estimate the actual volume of lodging guests and visiting friends and relatives (VFRs) who come to Napa Valley during the year. The third segment of visitors, day-trip visitors, was estimated using the relative incidence of lodging guests to day-trip visitors seen in the data collected in the Visitor Intercept Survey. Using the visitor volume estimates that emerged from this process, the survey data was weighted to develop the overall visitor profile.

For each question asked, the report additionally presents results for each of these three visitor segments: lodging guests, visiting friends and relatives (VFRs) and day-trip visitors. These results are presented in tabular format next to charts representing the overall visitor profile. The un-weighted survey sample sizes for each visitor segment are also shown in these data tables.

Executive Summary

Key Findings



- **Visitor Volume.** Research conducted for this project suggests that Napa Valley hosted 2.9 million visitors in 2012. The largest segment of visitors, day-trip visitors, represents 1.9 million visitors, or 66 percent of visitor volume. These day-trip visitors include California residents visiting for the day, as well as domestic and international visitors who stay overnight outside of Napa Valley yet venture into the area for the day. Napa Valley lodging properties hosted an estimated 875,650 visitors in 2012, or approximately one-third of all visitors. The smallest segment of visitors consisted of VFR visitors, accounting for about 125 thousand persons (4.2% of overall visitor volume).
- **Primary Reason for Visit.** Leisure is the primary driver of Napa Valley’s tourism. 34.4 percent of survey respondents characterized their Napa Valley trip as a vacation, while an identical proportion said they came for a weekend getaway (34.2%). Over one in ten visitors came to Napa Valley to attend a wedding or other special event (11.7%), and a similar proportion visited for other personal purposes (11.3%). 7.6 percent of Napa Valley visitors came for business, conference, or government travel reasons.
- **Visits to Napa Valley in Past Twelve Months.** The average Napa Valley visitor made 2.8 trips to Napa Valley in the past twelve months—2.44 leisure trips, 0.29 business trips and 0.04 conference or other group meeting trips—with leisure being the primary driver of these visits. Day-trip visitors visit Napa Valley with the most frequency, taking 3.1 trips to Napa Valley per year on average (Napa Valley lodging guests take 2.0 trips to Napa Valley per year on average and VFR visitors take 1.9 trips per year on average).

Executive Summary



Key Findings

- **Airport Used.** San Francisco International Airport is, by far, the most commonly used airport by Napa Valley visitors who arrive in the region by plane. Three-quarters of survey respondents who arrived by plane flew into San Francisco International Airport (75.3%). Similar proportions—about one in ten used Oakland International Airport (10.9%) or Sacramento International. Less than 2 percent used Sonoma County Airport (1.2%) or Napa County Airport (0.6%).
- **Transportation Methods.** Nearly all Napa Valley visitors travel within the area via automobile (96.6%), whether a personal car (58.9%) or rental car (37.7%). One in five visitors reported walking around (20.9%). Limousines, bicycles, taxis and hotel shuttles were each used by less than 5 percent of visitors.
- **Parking Options Used.** Just over 80 percent of day-trip and VFR visitors used a parking facility provided by a business they were patronizing during their Napa Valley trip. 40.1 percent of day-trip and VFR visitors used street parking the day they were surveyed. About one-third used a public parking lot (32.5%) and 12.5 percent used a public multi-floor garage for parking. [Note: This question was not asked on the Lodging Guest Survey]
- **Napa Towns Visited.** St. Helena (66.6%) and the City of Napa (63.2%) are the Napa Valley towns with the highest visitor traffic. Nearly half of Napa Valley visitors surveyed went to Yountville (48.3%). 43.6 percent visited Calistoga.

Executive Summary



Key Findings

- **Activities and Attractions.** Visiting wine tasting rooms (82.2%) and dining in restaurants (77.0%) are the most popular activities for Napa Valley visitors, followed by shopping (53.8%) and taking winery tours (52.0%).
- **Napa Wineries Visited.** The average Napa Valley visitor went to 4.1 wineries or tasting rooms during his/her visit. Overnight visitors (lodging guest/VFR) visit at least 5 wineries on average during their stay in the area. The typical day-trip visitor gets to 3.5 wineries on their trip.
- **Advanced Winery Reservations.** Nearly one-third of all visitors made advanced appointments to visit Napa Valley wineries (32.8%) during their trip. Greater proportions of VFR visitors (47.9%) and lodging guests (40.8%) secured reservations than day-trip visitors (28.2%).
- **Opinion on Winery Reservations.** The largest proportion of Napa Valley visitors, 40.2 percent, are neutral or don't care about wineries requiring advanced appointments for tastings. Statistically identical proportions report liking it (30.0%) and disliking it (29.9%).
- **Likelihood of Joining Wine Club.** More than one in four day-trip and VFR visitors surveyed said they were "likely" (15.8%) or "very likely" (10.7%) to join a wine club during their visit to Napa Valley. [Note: This question was not asked on the Lodging Guest Survey]

Executive Summary



Key Findings

- **Likelihood of Buying Wine to Take Home.** 70 percent of day-trip and VFR visitors are “likely” (27.3%) or “very likely” (43.0%) to purchase wine for home while in Napa Valley. About one in five felt they were “unlikely” (11.7%) or “very unlikely” (8.2%) to take or ship wine home. [Note: This question was not asked on the Lodging Guest Survey]
- **Visitor Spending in Napa Valley.** Napa Valley visitors report an average spending of \$458.87 per day while in the area. Napa Valley’s lodging guests represent the most spending by far, with average daily spending of \$708.47. Visiting friends and relatives spend \$447.44 per day on average, and day-trip visitors spend \$349.78. The bulk of this spending is on restaurants, accommodations and tasting room fees. On average, this reported daily spending in Napa Valley covers 2.2 persons. Thus, it is estimated that the average visitor represents \$205.26 of daily spending in Napa Valley.
- **Number of Persons in Hotel Room.** There were 2.1 persons per hotel room on average.
- **Length of Stay in Napa Valley.** Overnight visitors to Napa Valley—whether lodging guests or VFRs—spend 3.0 days in the area. The mean number of trip days across all visitors is 2.1
- **Travel Party Size.** The typical travel party is 2.60 persons, consisting of 1.45 females and 1.14 males. Day-trip visitors are typically younger than lodging guests on average and are have more likelihood to be traveling with children.

Executive Summary



Key Findings

- **Planning Resources Used Before Arrival in Napa Valley.** User-generated content (29.3%), online travel agencies (19.9%) and other travel websites (19.0%) were the most commonly accessed resources Napa Valley visitors utilized for trip planning before arriving in the area. Lodging guests are most likely to use the Official Napa Valley destination website (23.9%) and the Official Napa Valley Visitors Guide (10.4%) compared to day-trip and VFR visitors.
- **Planning Resources Used After Arrival in Napa Valley.** Once in the Napa Valley, free winery maps and/or guides (27.0%), and information gathered on a mobile device (24.0%) were the most used resources for planning purposes among visitors. Compared to VFR visitors (13.1%) and day-trip visitors (6.9%), lodging guests have the greatest tendency to use the Official Napa Valley Visitors Guide (17.4%) while in-market.
- **Most Liked Aspects of Napa Valley.** Napa Valley's scenic beauty (37.3%) and wine (34.9%) are the destination's attributes most cherished by its visitors. About one in ten visitors cited the area's food and restaurants (11.4%) and weather (9.2%) as an aspect they liked best about Napa Valley.
- **Enhancing the Napa Valley Experience.** When asked to identify services or attractions that could enhance the Napa Valley experience, the largest proportion of respondents to this question believes that the destination is great as it is (15.8%). Of the actual suggestions, more affordable transportation (4.3%), traffic reduction (4.2%), free wine tastings (3.2%) and making the destination generally more affordable (3.1%) garnered the most agreement.

Executive Summary



Key Findings

- **Likelihood to Return to Napa Valley.** Nearly all Napa Valley visitors, 92.9 percent, are likely or very likely to return to the area. This suggests a high degree of satisfaction with the Napa Valley visitor experience. The largest visitor segment to report being very likely to return to Napa is lodging guests (78.4%).
- **Interest in Using Napa County Airport.** Although 31.7 percent felt this was not applicable to them, 28.3 percent of all Napa Valley visitors surveyed said they would be “interested” or “very interested” in arriving through Napa County’s commercial airport if served by one or more major carriers on their next trip to Napa Valley (28.3%).
- **Gender.** Survey respondents skew female (52.1%).
- **Age.** Over two-thirds of all Napa Valley visitors are 35 years or older (67.3%), including 29.4 percent who are over 55 years old. Napa Valley’s lodging guests tend to be older than other visitor segments, with an average age of 52 years. The typical visiting friend or relative visitor is 45 years old, while the typical day-trip visitor is 43 years old.
- **Annual Household Income.** Napa Valley visitors are affluent, with approximately half of all survey respondents who report an annual household income above \$100,000. The typical Napa Valley lodging guest has an average annual household income of \$195,000. Napa Valley day-trip visitors have an average annual income of \$154,000 and VFR visitors an annual income of \$145,000.

Executive Summary



Key Findings

- **Ethnicity.** Approximately two-thirds of Napa visitors identify as Caucasian (65.4%). Day-trip visitors are more ethnically diverse, with over one-third who report an ethnicity other than Caucasian (34.3% versus 11.8% of lodging guests and 10.8% of VFRs).
- **Education.** Commiserate with their income, Napa Valley's visitors are well educated. Nearly three quarters of visitors have at least a bachelor's degree, including one-third who hold a graduate degree.
- **Marital Status.** Over 60 percent of Napa Valley's visitors are married or partnered. Approximately one in four is single. 11.3 percent have children under age 18.
- **Sexual Orientation.** 2.2 percent of all survey respondents identifies as GLBT.
- **Point of Origin: Country.** 91.9 percent of all Napa Valley visitors reside in the United States. Canada (2.8%), the UK (1.2%) and Australia (1.0%) are the top international feeder markets to Napa Valley.
- **Point of Origin: State.** Nearly 60 percent of domestic visitors to Napa Valley reside in the state of California. 3.7 percent live in Texas, 2.9 percent are from Florida and 2.5 percent are from New York.
- **Point of Origin: MSA.** 37.7 percent of all domestic Napa Valley visitors come from the San Francisco-Oakland-San Jose metropolitan statistical area (MSA). 8.4 percent reside in the Los Angeles-Long Beach-Santa Ana MSA, and 6.1 percent visit from the Sacramento-Arden-Arcade-Roseville MSA.

Visitor Volume—2012

Napa Valley



DESTINATION ANALYSTS

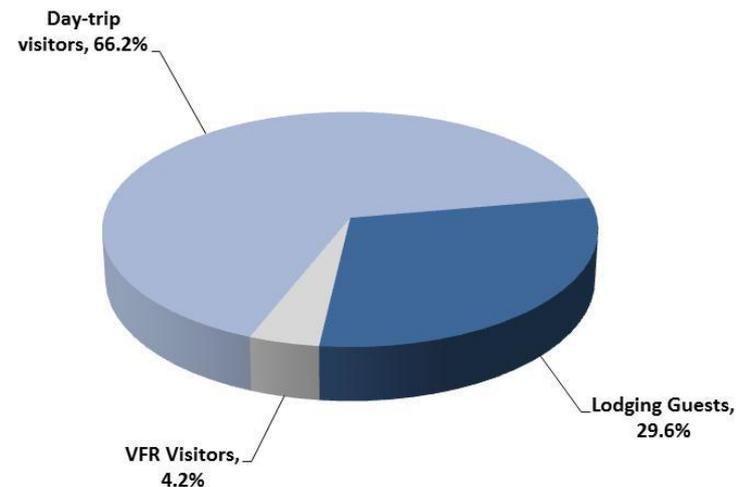
Research conducted for this project suggests that Napa Valley hosted 2.9 million visitors in 2012. The chart at right shows the proportion of visitors in each of the three segments.

The largest segment of visitors, day-trip visitors, represents 1.9 million visitors, or 66 percent of visitor volume. These day-trip visitors include California residents visiting for the day, as well as domestic and international visitors who stay overnight outside of Napa Valley yet venture into the area for the day.

Napa Valley lodging properties hosted an estimated 875,650 visitors in 2012, or approximately one-third of all visitors. The smallest segment of visitors consisted of VFR visitors, accounting for about 125 thousand persons (4.2% of overall visitor volume).

Visitor Volume, 2012

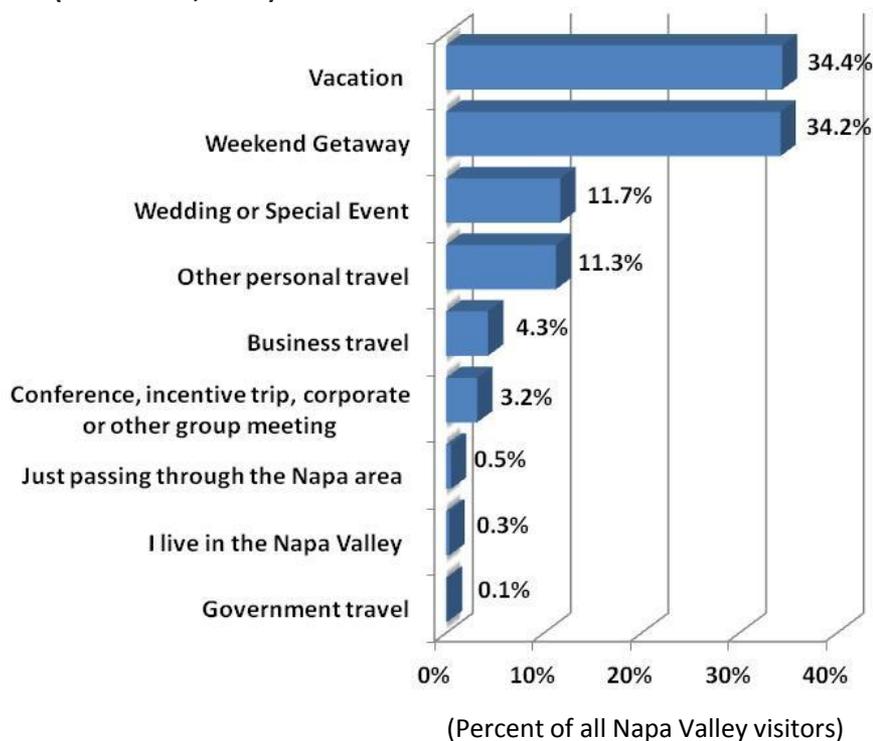
Day-trip Visitors	1,962,299
Lodging Guests	875,650
VFR Visitors	124,585
Total	2,962,535



Primary Reason for Visit

Napa Valley’s visitors primarily come for leisure purposes, such as a vacation or weekend getaway. 34.4 percent of survey respondents were in Napa Valley for vacation, and another third came for a weekend getaway (34.2%). Approximately one in ten attended a wedding or special event (11.7%); a similar proportion visited for other personal travel reasons (11.3%). 7.6 percent of visitors came for business, conference, or government travel purposes.

Chart 1: Primary Reason for Visit
(All Visitors, 2012)



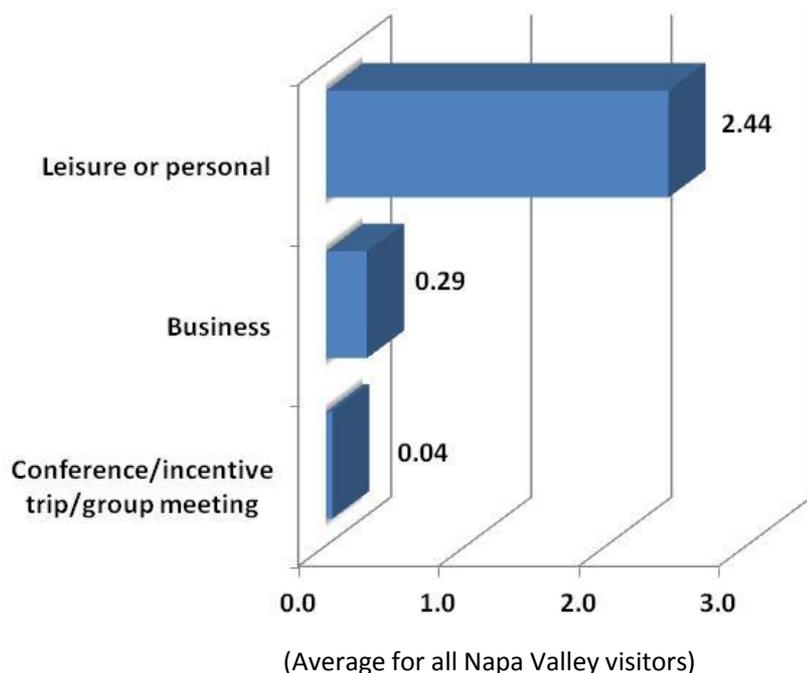
	Lodging Guests	VFR Visitors	Day-trip visitors
Weekend Getaway	33.3%	21.0%	36.3%
Vacation	36.5%	47.1%	31.5%
Wedding or Special Event	13.1%	19.3%	9.9%
Other personal travel	6.0%	9.2%	15.3%
Business travel	4.6%	2.5%	4.3%
Conference, incentive trip, corporate or other group meeting	4.2%	0.8%	2.7%
Just passing through the Napa area	1.3%	0.0%	0.0%
I live in the Napa Valley	0.8%	0.0%	0.0%
Government travel	0.3%	0.0%	0.0%
Base:	1,117	119	444

Question: Which best describes the primary reason for making this visit to the Napa Valley? (Select one)

Visits to Napa Valley in Past Twelve Months

The average Napa Valley visitor made 2.8 trips to Napa Valley in the past twelve months—2.44 leisure trips, 0.29 business trips and 0.04 conference or other group meeting trips—with leisure being the primary driver of these visits. Day-trip visitors visit Napa Valley with the most frequency, taking 3.1 trips to Napa Valley per year on average (Napa Valley lodging guests take 2.0 trips to Napa Valley per year on average and VFR visitors take 1.9 trips per year on average).

Chart 2: Average Visits in Past 12 Months
(All Visitors, 2012)



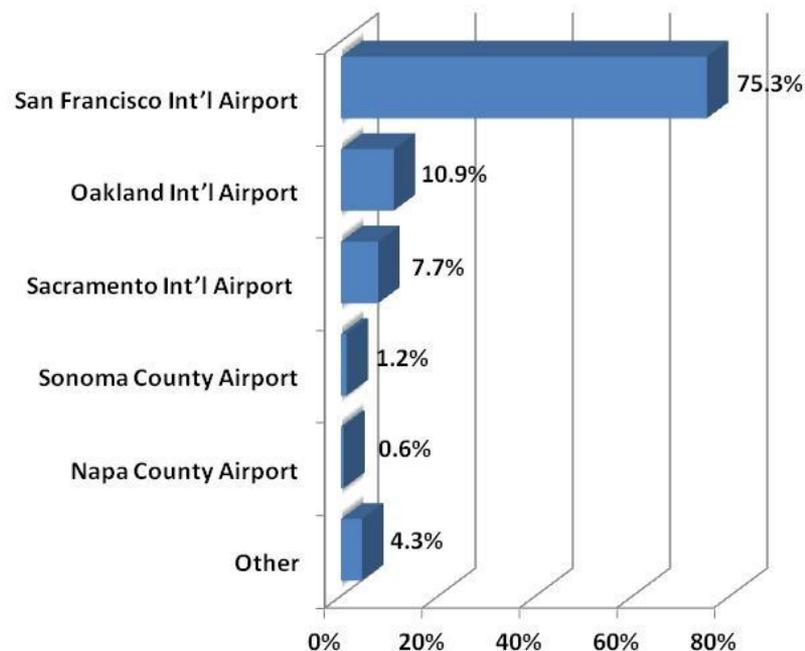
	Lodging Guests	VFR Visitors	Day-trip visitors
Leisure or personal	1.7	1.8	2.8
Business	0.2	0.1	0.3
Conference/incentive trip/group meeting	0.1	0.0	0.0
Base:	1,097	120	728

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?

Airport Used

San Francisco International Airport is, by far, the most commonly used airport by Napa Valley visitors who arrive in the region by plane. Three-quarters of survey respondents who arrived by plane flew into San Francisco International Airport (75.3%). Similar proportions—about one in ten used Oakland International Airport (10.9%) or Sacramento International. Less than 2 percent used Sonoma County Airport (1.2%) or Napa County Airport (0.6%).

Chart 3: Airport Used
(All Visitors, 2012)



(Percent of Napa Valley visitors arriving by plane)

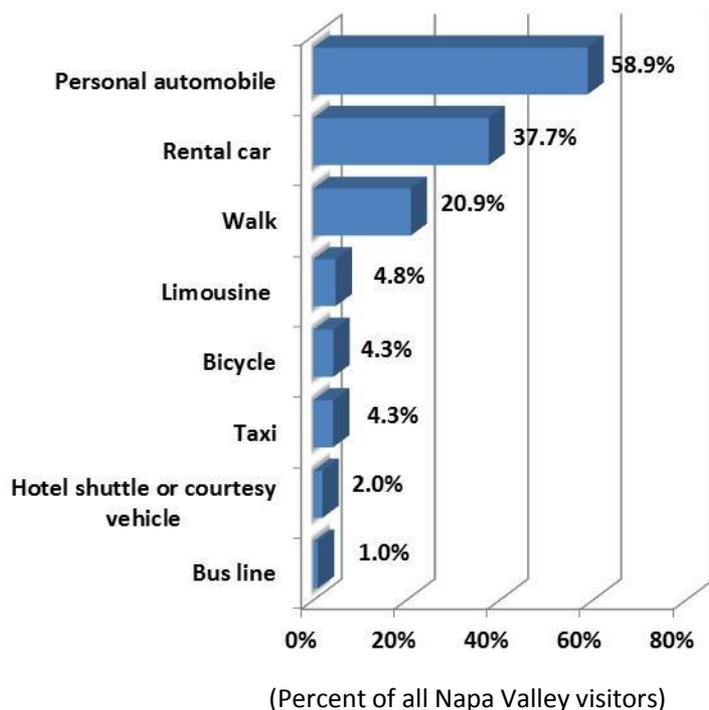
	Lodging Guests	VFR Visitors	Day-trip visitors
San Francisco Int'l Airport	73.3%	63.6%	78.8%
Oakland Int'l Airport	10.5%	19.5%	9.8%
Sacramento Int'l Airport	10.0%	11.7%	5.2%
Napa County Airport	0.7%	0.0%	0.5%
Sonoma County Airport	1.6%	0.0%	1.0%
Other	3.8%	5.2%	4.7%
Base:	550	77	193

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

Transportation Methods

Nearly all Napa Valley visitors travel within the area via automobile (96.6%), whether a personal car (58.9%) or rental car (37.7%). One in five visitors reported walking around (20.9%). Limousines, bicycles, taxis and hotel shuttles were each used by less than 5 percent of visitors.

Chart 4: Transportation Methods
(All Visitors, 2012)



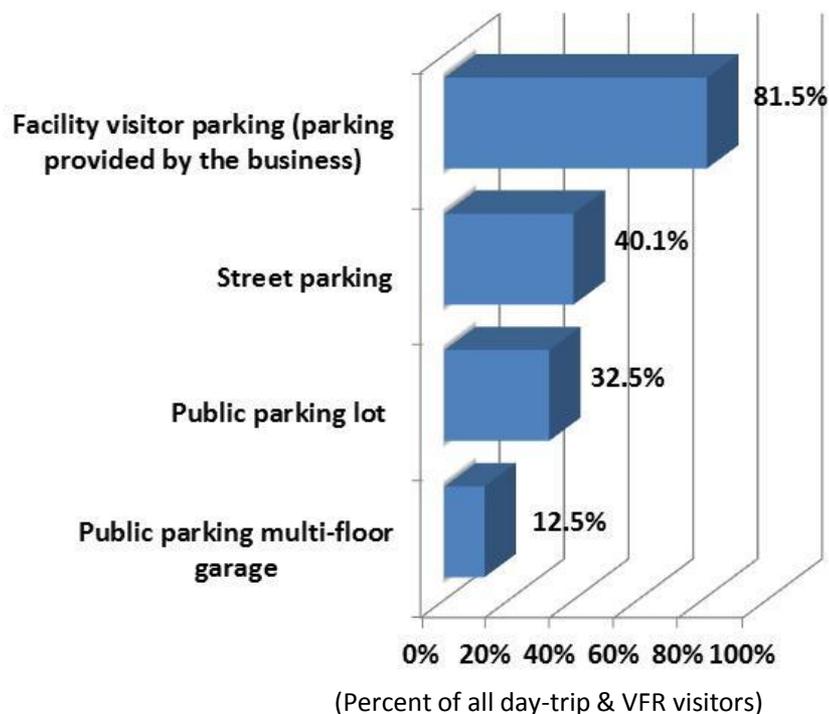
	Lodging Guests	VFR Visitors	Day-trip visitors
Personal automobile	53.3%	56.0%	61.5%
Rental car	39.3%	43.1%	36.4%
Walk	25.1%	39.7%	17.7%
Limousine	7.1%	10.3%	3.3%
Bicycle	9.5%	6.9%	1.7%
Taxi	4.0%	9.5%	4.1%
Hotel shuttle or courtesy vehicle	5.1%	0.0%	0.6%
Bus line	1.9%	0.9%	0.6%
Base:	1,111	116	689

Question: On this trip, which methods of transportation did you utilize while in the Napa Valley?

Parking Options Used

Just over 80 percent of day-trip and VFR visitors used a parking facility provided by a business they were patronizing during their Napa Valley trip. 40.1 percent of day-trip and VFR visitors used street parking the day they were surveyed. About one-third used a public parking lot (32.5%) and 12.5 percent used a public multi-floor garage for parking. [Note: This question was not asked on the Lodging Guest Survey]

Chart 5: Parking Options Used
(Day-trip & VFR Visitors, 2012)



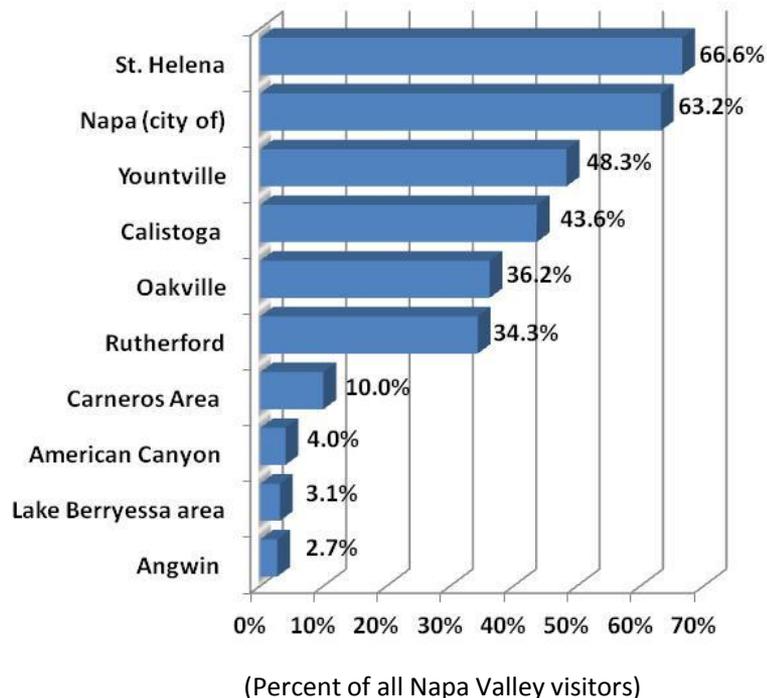
	Lodging Guests	VFR Visitors	Day-trip visitors
Facility visitor parking	na	81.1%	81.5%
Street parking	na	68.9%	38.2%
Public parking lot	na	50.8%	31.4%
Public parking multi-floor garage	na	30.3%	11.4%
Base:	na	122	740

Question: Which of these parking options—if any—did you or will you use while in the Napa Valley today?

Napa Valley Towns Visited

St. Helena (66.6%) and the City of Napa (63.2%) are the Napa Valley towns with the highest visitor traffic. Nearly half of Napa Valley visitors surveyed went to Yountville (48.3%). 43.6 percent visited Calistoga.

Chart 6: Napa Towns Visited
(All Visitors, 2012)



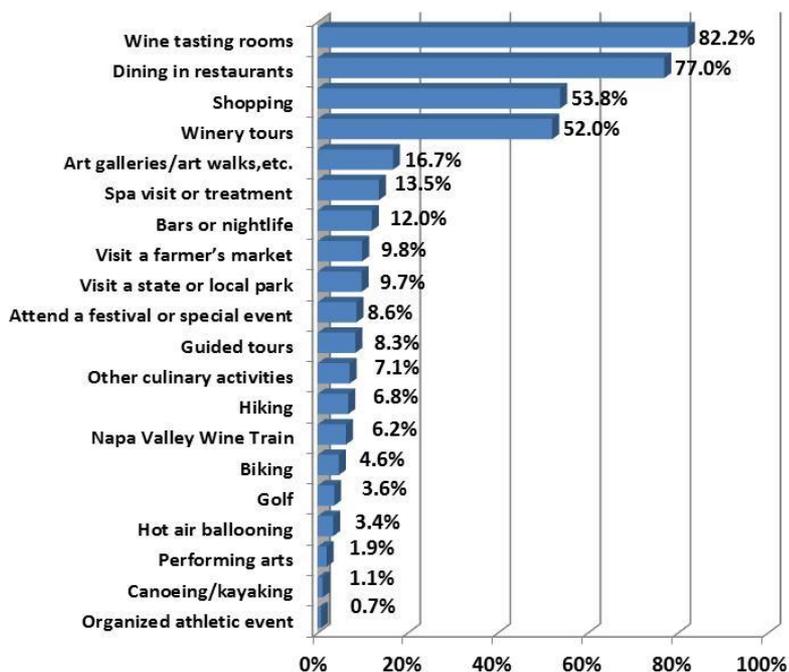
	Lodging Guests	VFR Visitors	Day-trip visitors
St. Helena	67.8%	78.5%	65.2%
Napa (city of)	64.9%	81.0%	61.4%
Yountville	59.1%	62.8%	42.6%
Calistoga	59.3%	62.8%	35.4%
Oakville	28.7%	46.3%	38.9%
Rutherford	33.5%	57.0%	33.2%
Carneros Area	13.4%	23.1%	7.6%
American Canyon	4.1%	5.0%	3.9%
Lake Berryessa area	3.0%	14.0%	2.5%
Angwin	3.0%	8.3%	2.2%
Base:	1,101	121	725

Question: On this trip, which Napa Valley towns (or areas) did you visit?

Activities & Attractions in Napa Valley

Visiting wine tasting rooms (82.2%) and dining in restaurants (77.0%) are the most popular activities for Napa Valley visitors, followed by shopping (53.8%) and taking winery tours (52.0%).

Chart 7: Activities & Attractions in Napa County
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

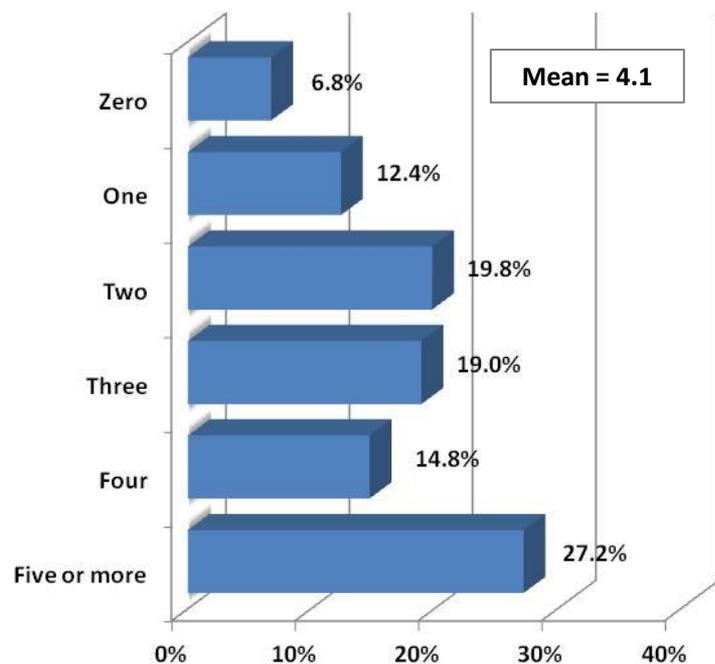
	Lodging Guests	VFR Visitors	Day-trip visitors
Wine tasting rooms	72.8%	90.1%	85.9%
Dining in restaurants	89.7%	71.9%	71.5%
Shopping	58.2%	63.6%	51.2%
Winery tours	47.0%	59.5%	53.8%
Art galleries/art walks, etc.	17.1%	37.2%	15.2%
Spa visit or treatment	25.5%	19.0%	7.8%
Bars or nightlife	13.5%	30.6%	10.0%
Visit a farmer's market	11.2%	16.5%	8.8%
Visit a state or local park	13.9%	16.5%	7.4%
Attend a festival/special event	7.6%	18.2%	8.4%
Guided tours	5.7%	21.5%	8.6%
Other culinary activities	9.7%	11.6%	5.6%
Hiking	8.1%	26.4%	4.9%
Napa Valley Wine Train	4.6%	21.5%	6.0%
Biking	5.4%	12.4%	3.8%
Golf	2.3%	16.5%	3.3%
Hot air ballooning	2.8%	9.9%	3.2%
Performing arts	3.0%	5.0%	1.3%
Canoeing/kayaking	0.2%	4.1%	1.3%
Organized athletic event	0.8%	0.0%	0.7%
Base:	1,101	121	725

Question: On this trip, in which activities or attractions did you participate while in the Napa Valley?

Napa Valley Wineries Visited

The average Napa Valley visitor went to 4.1 wineries or tasting rooms during his/her visit. Overnight visitors (lodging guest/VFR) visit at least 5 wineries on average during their stay in the area. The typical day-trip visitor gets to 3.5 wineries on their trip.

Chart 8: Napa Wineries Visited
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

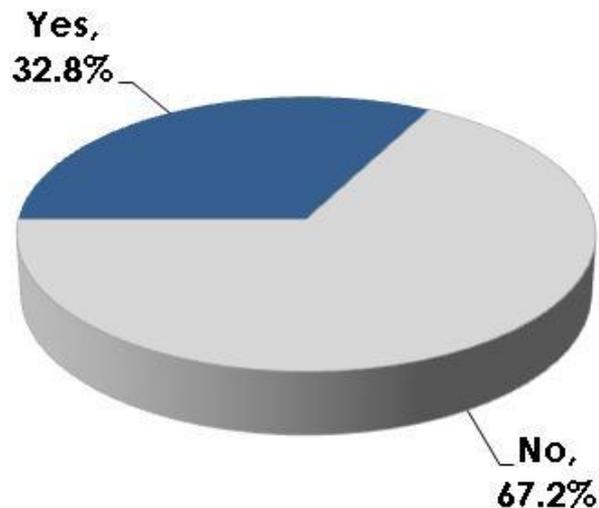
	Lodging Guests	VFR Visitors	Day-trip visitors
Zero	12.2%	2.6%	4.6%
One	11.4%	7.9%	13.2%
Two	14.0%	12.3%	22.9%
Three	10.7%	17.5%	22.8%
Four	11.6%	17.5%	16.0%
Five or more	40.0%	42.1%	20.6%
Average	5.2	5.1	3.5
Base:	1,040	114	676

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

Advanced Winery Reservations

Nearly one-third of all visitors made advanced appointments to visit Napa Valley wineries (32.8%) during their trip. Greater proportions of VFR visitors (47.9%) and lodging guests (40.8%) secured reservations than day-trip visitors (28.2%).

Chart 9: Advanced Winery Reservations
 (All Visitors, 2012)



(Percent of all Napa Valley visitors)

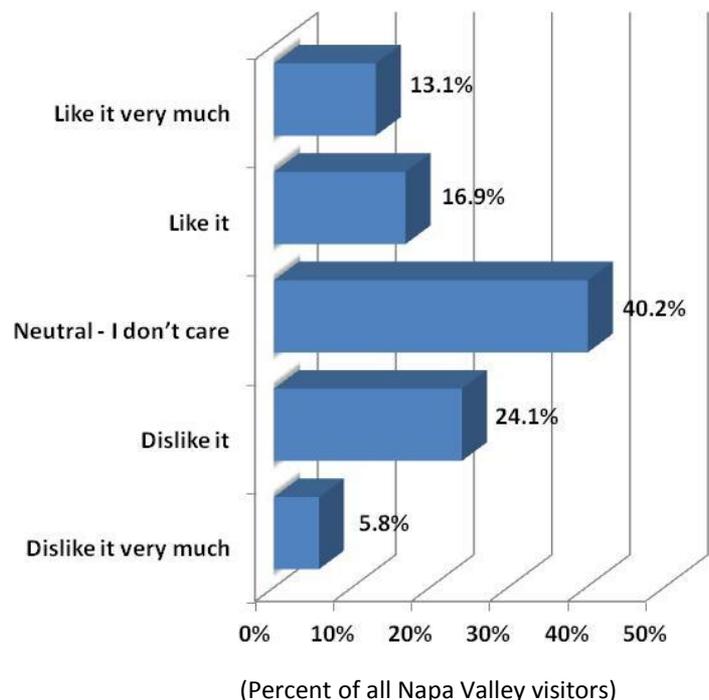
	Lodging Guests	VFR Visitors	Day-trip visitors
Yes	40.8%	47.9%	28.2%
No	59.2%	52.1%	71.8%
Base:	1,078	119	706

Question: Did you make advance appointments to visit Napa Valley wineries?

Opinion on Winery Reservations

The largest proportion of Napa Valley visitors, 40.2 percent, are neutral or don't care about wineries requiring advanced appointments for tastings. Statistically identical proportions report liking it (30.0%) and disliking it (29.9%).

Chart 10: Opinion on Winery Reservations
(All Visitors, 2012)



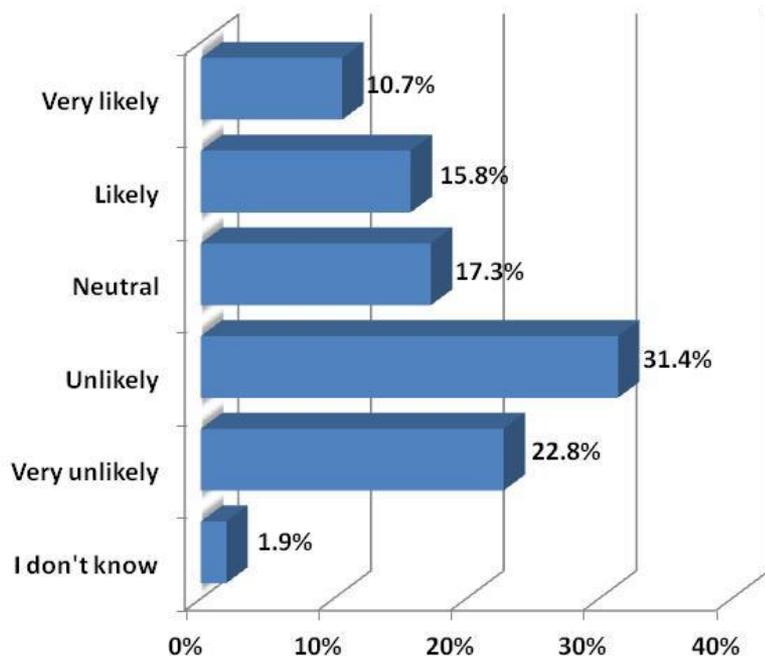
	Lodging Guests	VFR Visitors	Day-trip visitors
Like it very much	12.0%	21.5%	13.0%
Like it	11.1%	21.5%	19.1%
Neutral - I don't care	41.6%	36.4%	39.8%
Dislike it	26.9%	18.2%	23.3%
Dislike it very much	8.3%	2.5%	4.9%
Base:	1,071	121	718

Question: In general, how do you feel about wineries requiring advance appointments for wine tastings?

Likelihood of Joining Wine Club

More than one in four day-trip and VFR visitors surveyed said they were “likely” (15.8%) or “very likely” (10.7%) to join a wine club during their visit to Napa Valley. [Note: This question was not asked on the Lodging Guest Survey]

Chart 11: Likelihood of Joining Wine Club
(Day-trip & VFR Visitors, 2012)



(Percent of all Napa Valley day-trip & VFR visitors)

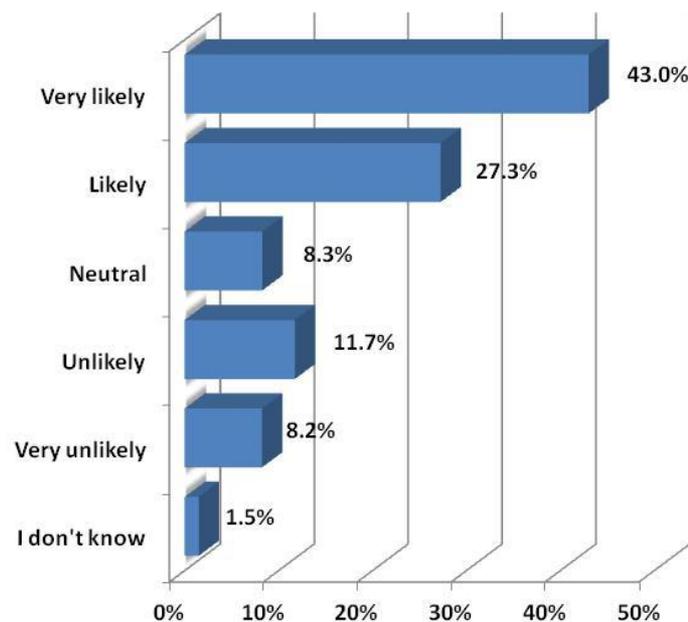
	Lodging Guests	VFR Visitors	Day-trip visitors
Very likely	na	14.0%	10.4%
Likely	na	17.4%	15.7%
Neutral	na	18.2%	17.3%
Unlikely	na	27.3%	31.7%
Very unlikely	na	22.3%	22.9%
I don't know	na	0.8%	2.0%
Base:	na	121	700

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

Likelihood of Buying Wine for Home

70 percent of day-trip and VFR visitors are “likely” (27.3%) or “very likely” (43.0%) to purchase wine for home while in Napa Valley. About one in five felt they were “unlikely” (11.7%) or “very unlikely” (8.2%) to take or ship wine home. [Note: This question was not asked on the Lodging Guest Survey]

Chart 12: Likelihood of Buying Wine to Take Home
(Day-trip & VFR visitors, 2012)



(Percent of all Napa Valley day-trip & VFR visitors)

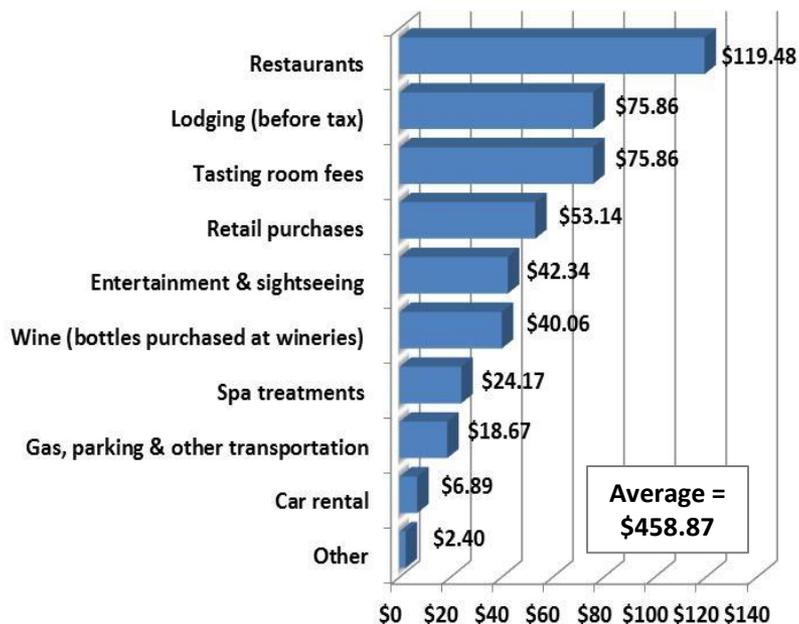
	Lodging Guests	VFR Visitors	Day-trip visitors
Very likely	na	36.4%	43.4%
Likely	na	32.2%	26.9%
Neutral	na	8.3%	8.3%
Unlikely	na	14.9%	11.5%
Very unlikely	na	5.8%	8.4%
I don't know	na	2.5%	1.4%
Base:	na	121	705

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

Visitor Spending in Napa Valley

Napa Valley visitors report an average spending of \$458.87 per day while in the area. Napa Valley's lodging guests represent the most spending by far, with average daily spending of \$708.47. Visiting friends and relatives spend \$447.44 per day on average, and day-trip visitors spend \$349.78. The bulk of this spending is on restaurants, accommodations and tasting room fees.

Chart 13: Spending in Napa County
(All Visitors, 2012)



(Spending in Napa Valley)

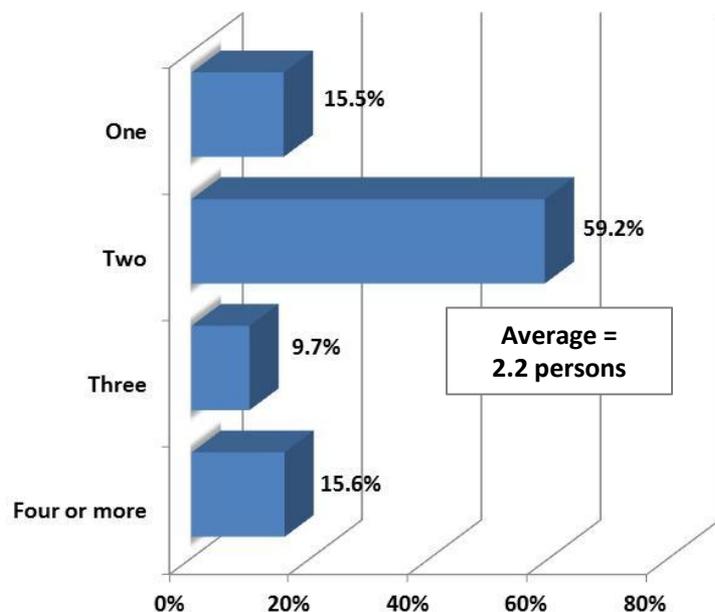
	Lodging Guests	VFR Visitors	Day-trip visitors
Restaurants	\$150.81	\$104.87	\$106.32
Lodging (before tax)	\$254.15	\$3.14	\$1.30
Tasting room fees	\$40.79	\$78.73	\$91.95
Retail purchases	\$59.02	\$86.74	\$48.39
Entertainment & sightseeing	\$22.35	\$59.90	\$50.30
Wine	\$105.46	\$36.17	\$11.74
Spa treatments	\$38.17	\$22.23	\$17.96
Gas, parking & other transportation	\$22.59	\$24.63	\$16.52
Car rental	\$11.08	\$25.97	\$3.80
Other	\$4.05	\$5.08	\$1.49
Average	\$708.47	\$447.44	\$349.78
Base:	1,129	122	740

Question: Approximately how much PER DAY did you spend on the following while in the Napa Valley? (Please only include your spending in the Napa Valley)

Number of Persons Covered by Spending

Reported daily spending in Napa Valley covers 2.2 persons on average.

Chart 14: Persons Covered by Spending
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

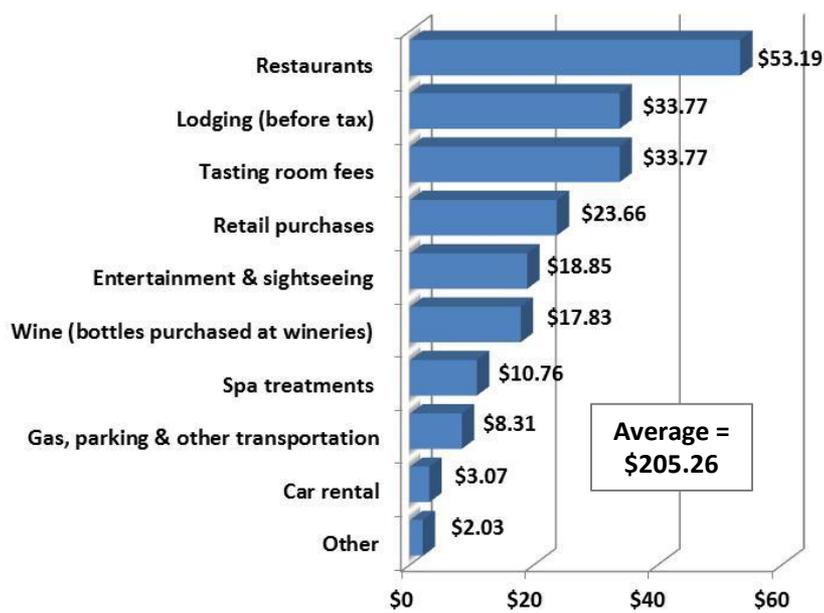
	Lodging Guests	VFR Visitors	Day-trip visitors
One	12.5%	19.1%	16.3%
Two	79.8%	51.3%	52.3%
Three	3.0%	13.0%	11.9%
Four or more	4.7%	16.5%	19.5%
Average	2.0	2.3	2.3
Base:	856	115	687

Question: How many persons' travel expenses did this spending fully cover?

Average Daily Visitor Spending (Per Person)

It is estimated that the average Napa Valley visitor represents \$205.26 of daily spending in Napa Valley.

Chart 15: Spending Per-person, Per-day in Napa (All Visitors, 2012)



(Spending per-person, per-day in Napa Valley)

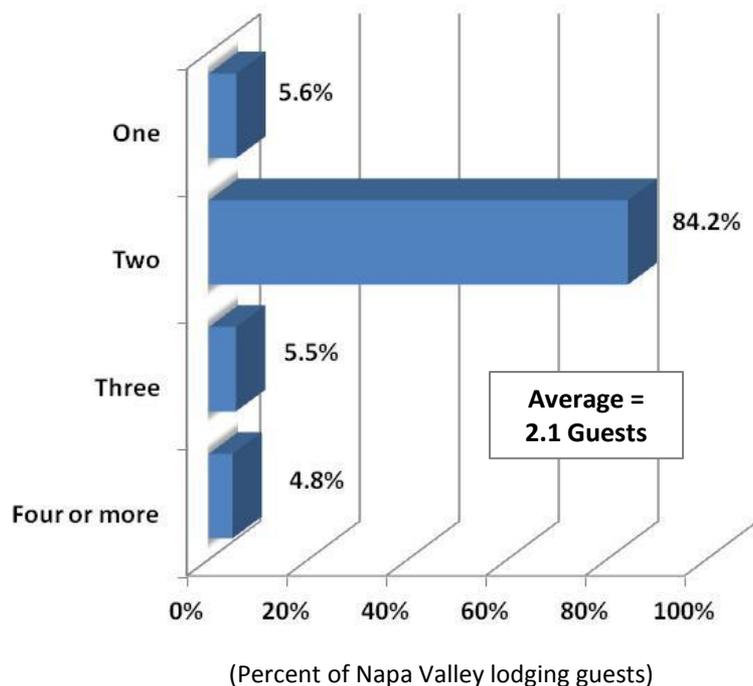
	Lodging Guests	VFR Visitors	Day-trip visitors
Restaurants	\$75.63	\$46.29	\$46.01
Lodging (before tax)	\$127.45	\$1.39	\$0.56
Tasting room fees	\$20.45	\$34.75	\$39.80
Retail purchases	\$29.60	\$38.29	\$20.94
Entertainment & sightseeing	\$11.21	\$26.44	\$21.77
Wine	\$52.89	\$15.96	\$5.08
Spa treatments	\$19.14	\$9.81	\$7.77
Gas, parking & other transportation	\$11.33	\$10.87	\$7.15
Car rental	\$5.56	\$11.46	\$1.64
Other	\$2.03	\$2.24	\$0.64
Average	\$355.28	\$197.50	\$151.39
Base:	1,129	122	740

Question: Approximately how much PER DAY did you spend on the following while in the Napa Valley? (Please only include your spending in the Napa Valley)

Number of Persons in Hotel Room

There were 2.1 persons per hotel room on average.

Chart 16: Number of Guests in Hotel Room
(Lodging Guests, 2012)



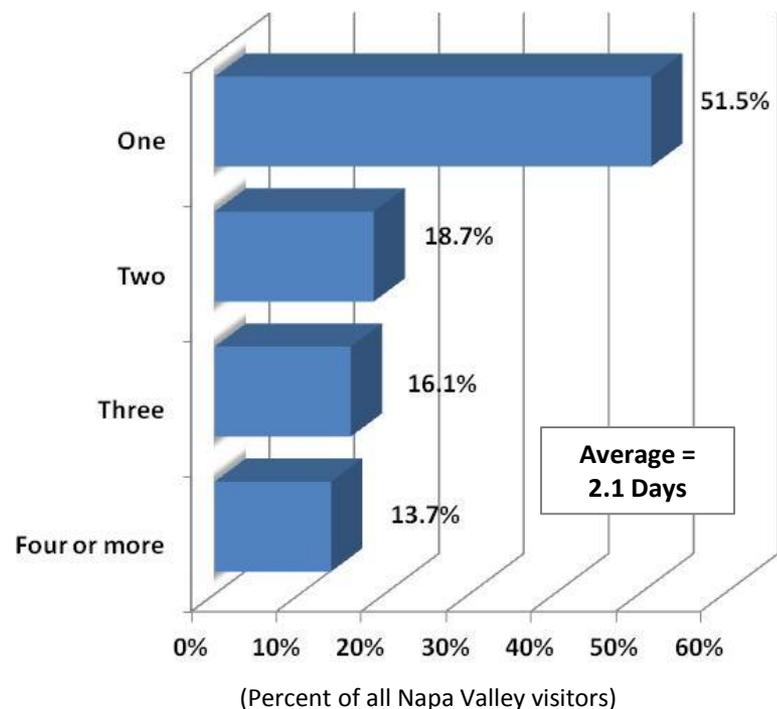
	Lodging Guests	VFR Visitors	Day-trip visitors
One	5.6%	na	na
Two	84.2%	na	na
Three	5.5%	na	na
Four or more	4.8%	na	na
Average	2.1	na	na
Base:	1,044	na	na

Question: Number of people in your hotel room

Length of Stay in Napa Valley

Overnight visitors to Napa Valley—whether lodging guests or VFRs—spend 3.0 days in the area. The mean number of trip days across all visitors is 2.1.

Chart 17: Days Spent in Napa County
(All Visitors, 2012)



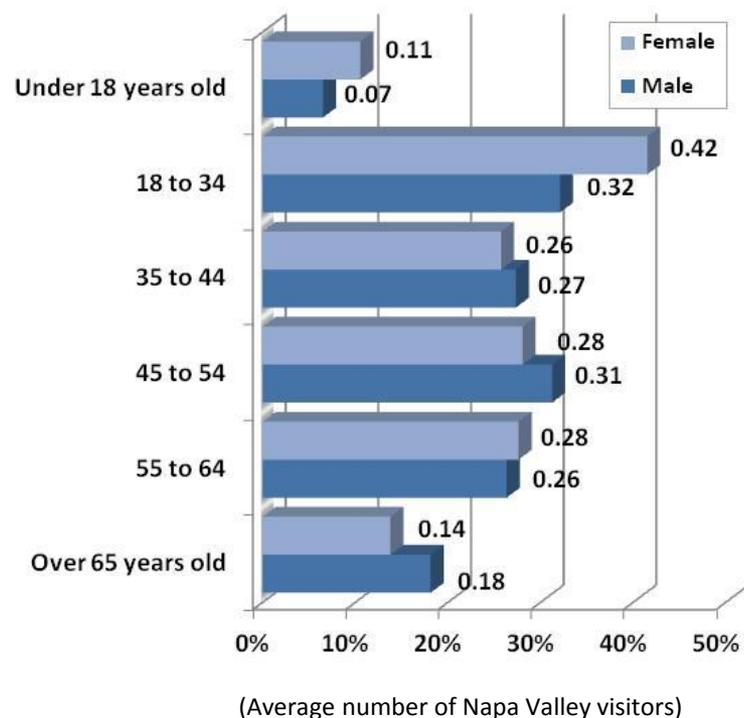
	Lodging Guests	VFR Visitors	Day-trip visitors
One	9.1%	16.3%	87.2%
Two	35.3%	23.1%	5.8%
Three	29.7%	35.6%	3.8%
Four or more	26.0%	25.0%	3.3%
Average	3.0	3.0	1.0
Base:	1,038	104	399

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

Travel Party Size

The typical travel party is 2.60 persons, consisting of 1.45 females and 1.14 males. Day-trip visitors are typically younger than lodging guests on average and are have more likelihood to be traveling with children.

Chart 18: Travel Party Size
(All Visitors, 2012)



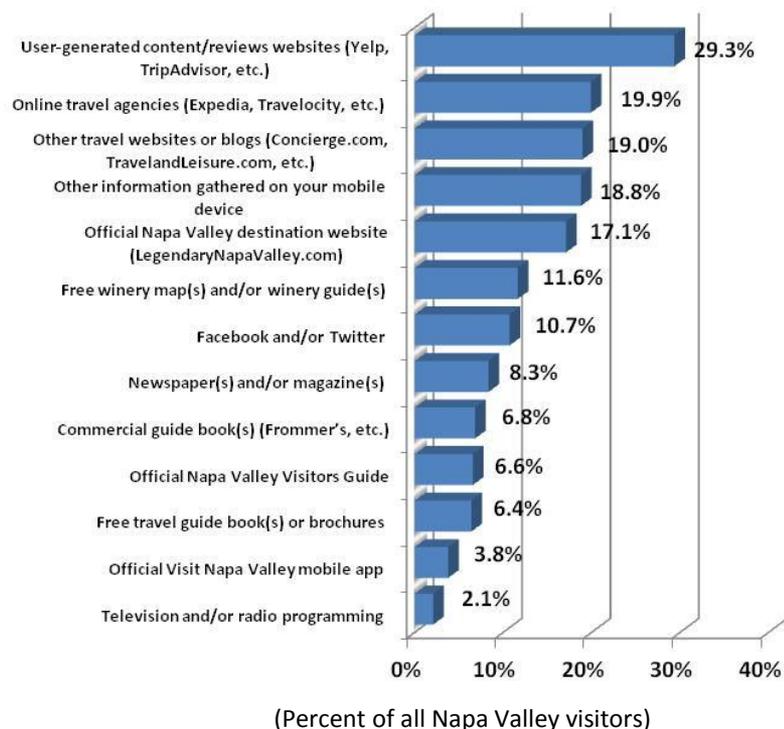
	Lodging Guests	VFR Visitors	Day-trip visitors
MALE			
Under 18 years old	0.03	0.03	0.09
18 to 34	0.13	0.23	0.41
35 to 44	0.18	0.23	0.32
45 to 54	0.24	0.34	0.34
55 to 64	0.32	0.18	0.24
Over 65 years old	0.25	0.13	0.15
Average males/party	1.14	1.14	1.56
FEMALE			
Under 18 years old	0.06	0.11	0.13
18 to 34	0.24	0.35	0.50
35 to 44	0.22	0.32	0.27
45 to 54	0.31	0.32	0.26
55 to 64	0.38	0.33	0.23
Over 65 years old	0.25	0.07	0.09
Average females/party	1.45	1.50	1.48
Total Party Size	2.60	2.63	3.04
Base:	1,129	121	723

Question: Please tell us how many people (including yourself) were in your immediate travel party.

Planning Resources Used Before Arrival in Napa Valley

User-generated content (29.3%), online travel agencies (19.9%) and other travel websites (19.0%) were the most commonly accessed resources Napa Valley visitors utilized for trip planning before arriving in the area. Lodging guests are most likely to use the Official Napa Valley destination website (23.9%) and the Official Napa Valley Visitors Guide (10.4%) compared to day-trip and VFR visitors.

Chart 19: Planning Resources Used BEFORE Arrival in Napa
(All Visitors, 2012)



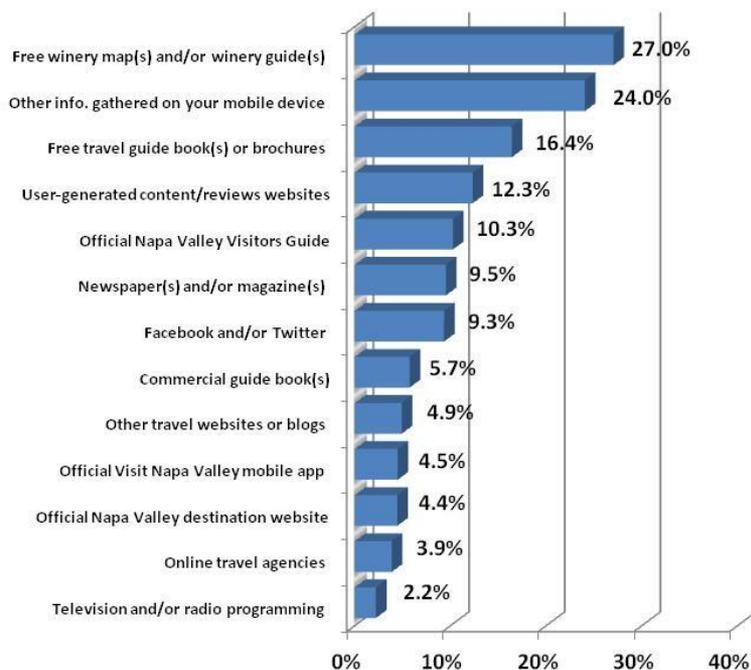
	Lodging Guests	VFR Visitors	Day-trip visitors
User-generated content/reviews websites	36.9%	29.5%	25.9%
Online travel agencies	24.5%	41.0%	16.5%
Other travel websites or blogs	15.1%	30.3%	20.0%
Other information gathered on your mobile device	12.7%	21.3%	21.4%
Official Napa Valley destination website	23.9%	13.1%	14.3%
Free winery map(s) and/or winery guide(s)	13.6%	11.5%	10.8%
Facebook and/or Twitter	6.4%	27.0%	11.6%
Newspaper(s) and/or magazine(s)	8.1%	13.1%	8.1%
Commercial guide book(s) (Frommer's, etc.)	11.4%	7.4%	4.7%
Official Napa Valley Visitors Guide	10.4%	6.6%	4.9%
Free travel guide book(s) or brochures	8.3%	10.7%	5.3%
Official Visit Napa Valley mobile app	2.7%	4.1%	4.2%
Television and/or radio programming	1.4%	3.3%	2.3%
Average # of resources used	1.75	2.19	1.50
Base:	1,129	122	740

Question: Which of the following tools did you use to plan your trip before arriving and which did you use while in the Napa? BEFORE ARRIVAL.

Planning Resources Used After Arrival in Napa Valley

Once in the Napa Valley, free winery maps and/or guides (27.0%), and information gathered on a mobile device (24.0%) were the most used resources for planning purposes among visitors. Compared to VFR visitors (13.1%) and day-trip visitors (6.9%), lodging guests have the greatest tendency to use the Official Napa Valley Visitors Guide (17.4%) while in-market.

Chart 20: Planning Resources Used AFTER Arrival in Napa (All Visitors, 2012)



(Percent of all Napa Valley visitors)

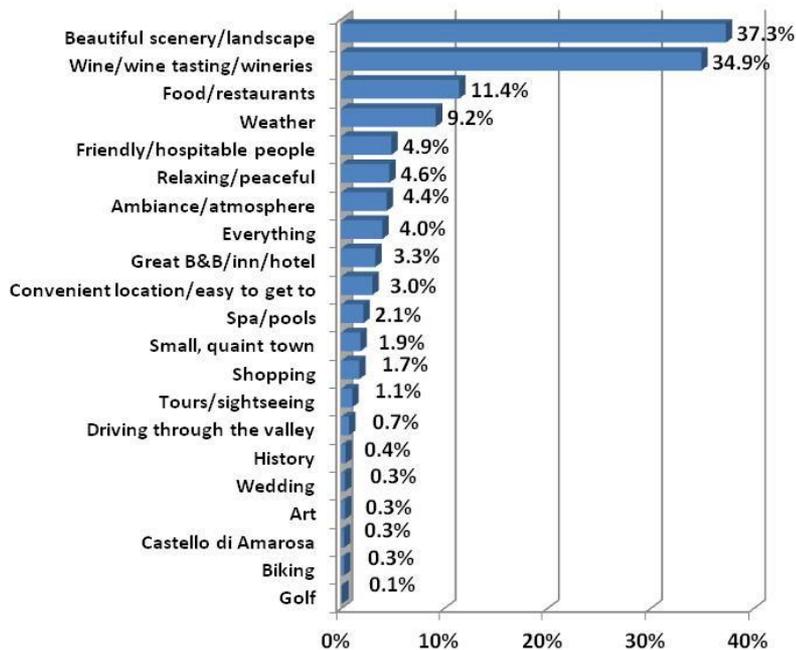
	Lodging Guests	VFR Visitors	Day-trip visitors
Free winery map(s) and/or winery guide(s)	32.2%	42.6%	23.8%
Other info. gathered on your mobile device	19.1%	32.8%	25.7%
Free travel guide book(s) or brochures	22.0%	29.5%	13.1%
User-generated content/reviews websites	12.0%	18.9%	12.0%
Official Napa Valley Visitors Guide	17.4%	13.1%	6.9%
Newspaper(s) and/or magazine(s)	12.8%	25.4%	7.0%
Facebook and/or Twitter	4.3%	23.8%	10.7%
Commercial guide book(s)	6.0%	13.1%	5.1%
Other travel websites or blogs	2.7%	17.2%	5.1%
Official Visit Napa Valley mobile app	4.4%	7.4%	4.3%
Official Napa Valley destination website	5.3%	6.6%	3.9%
Online travel agencies	1.8%	22.1%	3.6%
Television and/or radio programming	4.0%	9.8%	0.9%
Average # of resources used	1.44	2.62	1.22
Base:	1,129	122	740

Question: Which of the following tools did you use to plan your trip before arriving and which did you use while in the Napa? AFTER ARRIVAL.

Most Liked Aspects of Napa Valley

Napa Valley's scenic beauty (37.3%) and wine (34.9%) are the destination's attributes most cherished by its visitors. About one in ten visitors cited the area's food and restaurants (11.4%) and weather (9.2%) as an aspect they liked best about Napa Valley.

Chart 21: Most Liked Aspects of Napa County
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

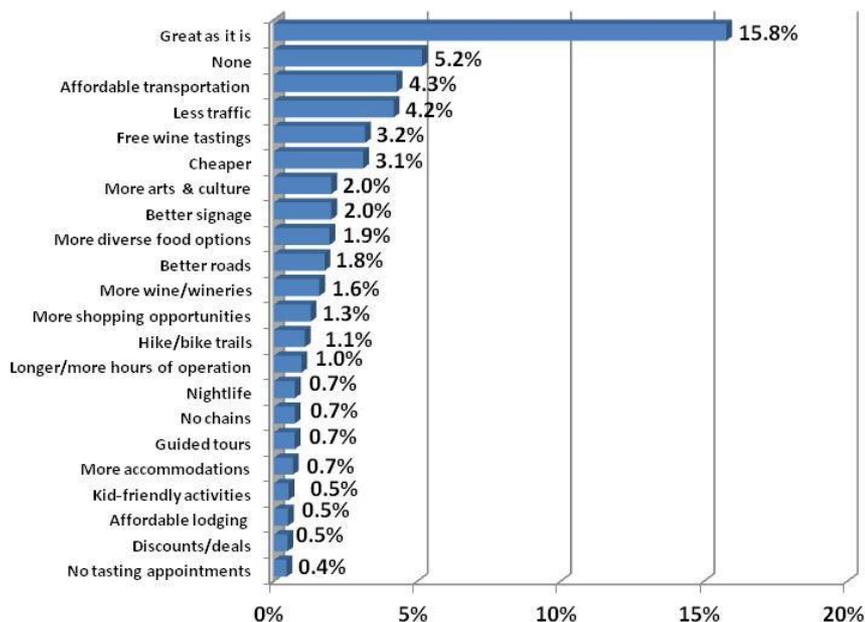
	Lodging Guests	VFR Visitors	Day-trip visitors
Beautiful scenery/landscape	17.7%	32.0%	46.4%
Wine/wine tasting/wineries	33.9%	33.6%	35.4%
Food/restaurants	20.1%	9.0%	7.7%
Weather	7.4%	13.1%	9.7%
Friendly/hospitable people	7.4%	1.6%	3.9%
Relaxing/peaceful	6.6%	4.9%	3.8%
Ambiance/atmosphere	3.4%	2.5%	5.0%
Everything	4.3%	4.9%	3.8%
Great B&B/inn/hotel	11.2%	0.0%	0.0%
Convenient location/easy to get to	1.7%	0.0%	3.8%
Spa/pools	6.6%	0.0%	0.3%
Small, quaint town	1.9%	0.8%	1.9%
Shopping	1.3%	0.0%	2.0%
Tours/sightseeing	2.3%	0.8%	0.5%
Driving through the valley	0.7%	0.0%	0.8%
History	0.4%	0.0%	0.4%
Art	0.4%	0.8%	0.3%
Wedding	0.4%	0.8%	0.3%
Castello di Amarosa	0.6%	0.0%	0.1%
Biking	0.9%	0.0%	0.0%
Golf	0.2%	0.8%	0.0%
Base:	1,129	122	740

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

Enhancing the Napa Valley Experience

When asked to identify services or attractions that could enhance the Napa Valley experience, the largest proportion of respondents to this question believe that the destination is great as it is (15.8%). Of the actual suggestions, more affordable transportation (4.3%), traffic reduction (4.2%), free wine tastings (3.2%) and making the destination generally more affordable (3.1%) garnered the most agreement.

Chart 22: Enhancing the Napa Valley Experience
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

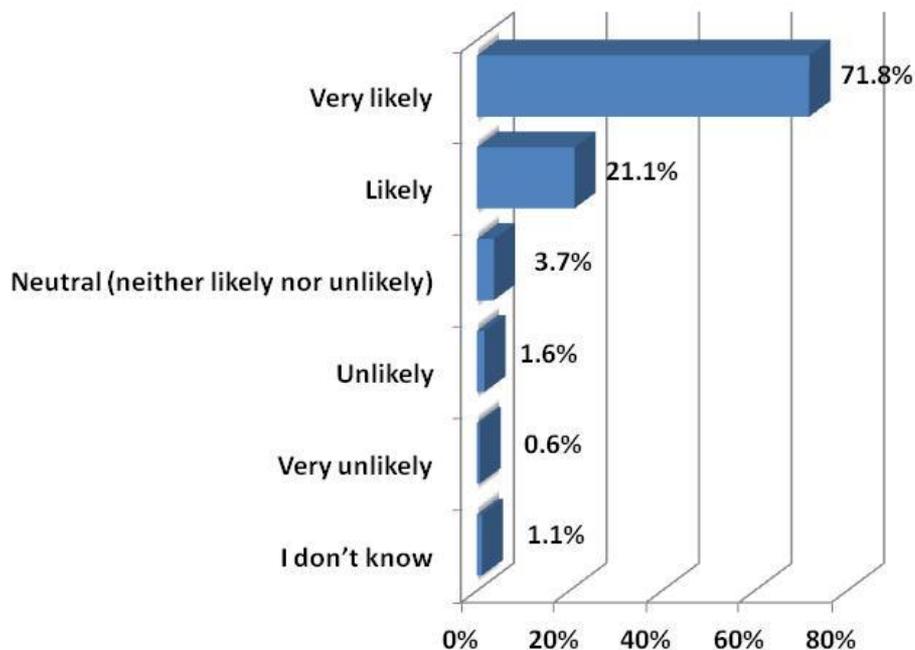
	Lodging Guests	VFR Visitors	Day-trip visitors
Great as it is	7.0%	17.2%	19.6%
None	1.9%	3.3%	6.8%
Affordable transportation	5.4%	4.1%	3.8%
Less traffic	1.4%	4.1%	5.4%
Free wine tastings	1.4%	1.6%	4.1%
Cheaper	3.0%	1.6%	3.2%
More arts & culture	1.2%	9.0%	1.9%
Better signage	0.5%	3.3%	2.6%
More diverse food options	3.1%	0.8%	1.5%
Better roads	0.9%	1.6%	2.2%
More wine/wineries	3.1%	0.8%	0.9%
More shopping opportunities	1.3%	4.1%	1.1%
Hike/bike trails	1.6%	1.6%	0.8%
Longer/more hours of operation	1.6%	0.8%	0.7%
Nightlife	0.5%	0.8%	0.8%
No chains	0.1%	1.6%	0.9%
Guided tours	0.6%	0.0%	0.8%
More accommodations	1.3%	0.0%	0.4%
Kid-friendly activities	0.3%	1.6%	0.5%
Affordable lodging	0.4%	0.0%	0.5%
Discounts/deals	0.3%	0.8%	0.5%
No tasting appointments	0.4%	1.6%	0.4%
Base:	1,129	122	740

Question: In your opinion, what attractions or services would have most enhanced your experience in the Napa Valley?

Likelihood to Return to Napa

Nearly all Napa Valley visitors, 92.9 percent, are likely or very likely to return to the area. This suggests a high degree of satisfaction with the Napa Valley visitor experience. The largest visitor segment to report being very likely to return to Napa is lodging guests (78.4%).

Chart 23: Likelihood to Return to Napa
 (All Visitors, 2012)



(Percent of all Napa Valley visitors)

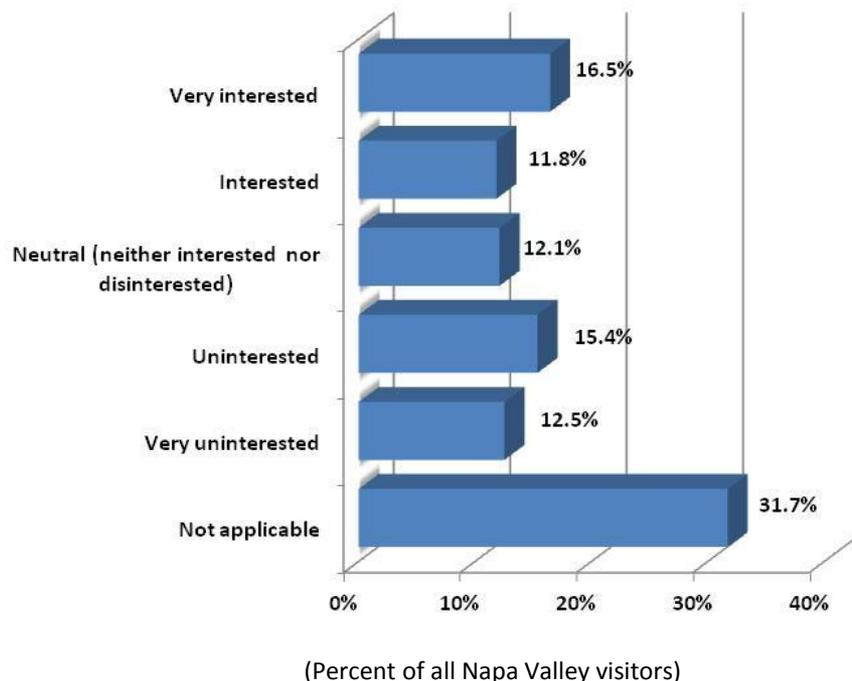
	Lodging Guests	VFR Visitors	Day-trip visitors
Very likely	78.4%	62.0%	69.5%
Likely	15.9%	26.4%	23.1%
Neutral (neither likely nor unlikely)	3.2%	8.3%	3.6%
Unlikely	1.1%	0.8%	2.0%
Very unlikely	0.5%	0.0%	0.7%
I don't know	0.9%	2.5%	1.1%
Base:	1,110	121	714

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

Interest in Using Napa County Airport

Although 31.7 percent felt this was not applicable to them, 28.3 percent of all Napa Valley visitors surveyed said they would be “interested” or “very interested” in arriving through Napa County’s commercial airport if served by one or more major carriers on their next trip to Napa Valley (28.3%).

Chart 24: Interest in Using Napa County Airport
(All Visitors, 2012)



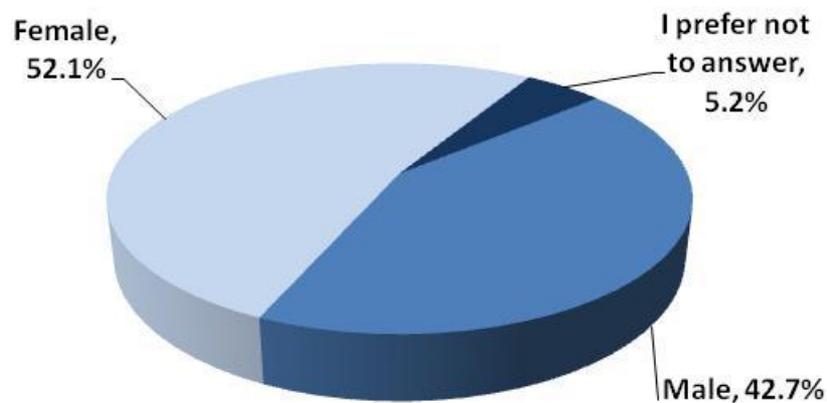
	Lodging Guests	VFR Visitors	Day-trip visitors
Very interested	26.0%	17.4%	12.1%
Interested	15.9%	10.7%	10.1%
Neutral (neither interested nor disinterested)	15.4%	15.7%	10.4%
Uninterested	10.8%	19.8%	17.2%
Very uninterested	5.6%	11.6%	15.7%
Not applicable	26.3%	24.8%	34.6%
Base:	1,095	121	705

Question: On your next visit to the Napa Valley, how interested would you be in arriving through Napa’s commercial airport if served by one or more major carriers?

Gender

Survey respondents skew female (52.1%).

Chart 25: Gender
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

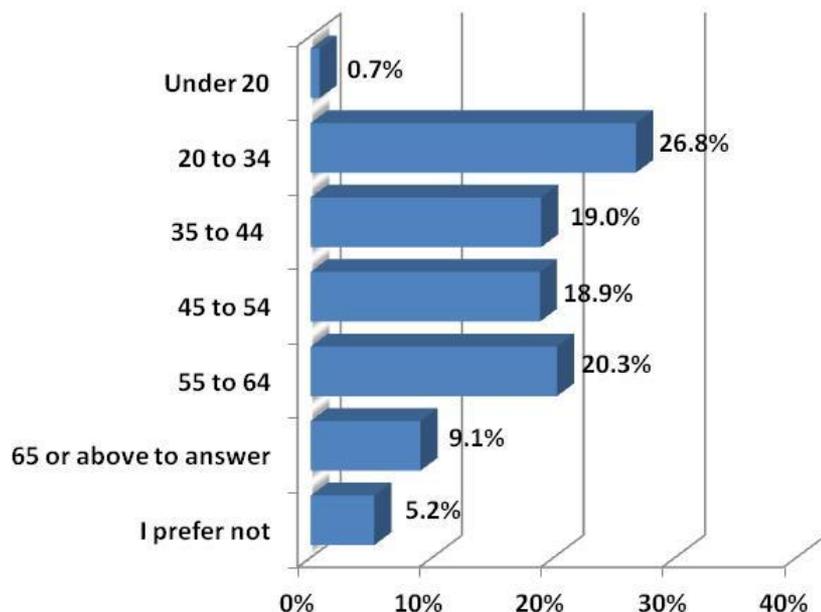
	Lodging Guests	VFR Visitors	Day-trip visitors
Female	62.5%	44.3%	47.8%
Male	36.5%	40.9%	45.7%
I prefer not to answer	1.0%	14.8%	6.5%
Base:	1,116	115	711

Question: What is your gender?

Age

Over two-thirds of all Napa Valley visitors are 35 years or older (67.3%), including 29.4 percent who are over 55 years old. Napa Valley's lodging guests tend to be older than other visitor segments, with an average age of 52 years. The typical visiting friend or relative visitor is 45 years old, while the typical day-trip visitor is 43 years old.

Chart 26: Age
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

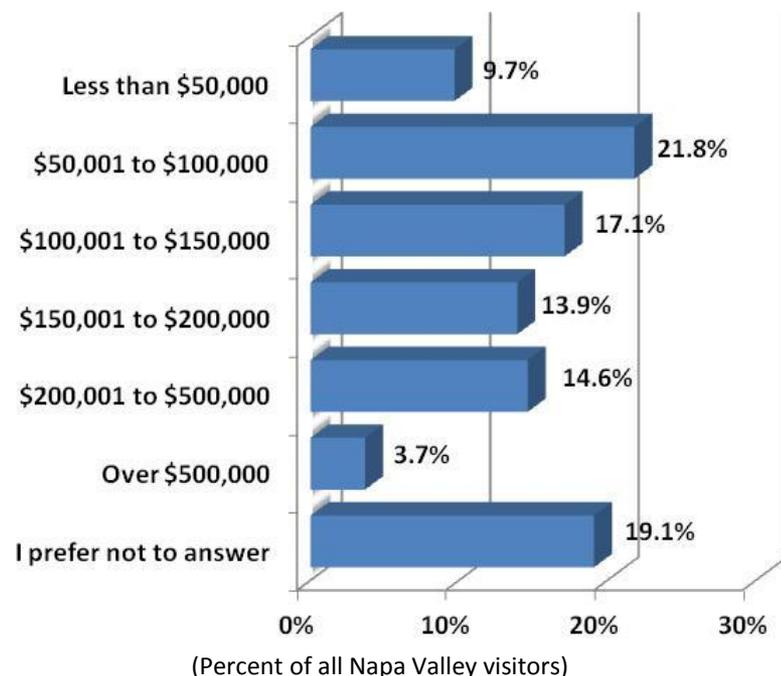
	Lodging Guests	VFR Visitors	Day-trip visitors
Under 20	0.1%	1.7%	1.0%
20 to 34	14.9%	22.4%	32.5%
35 to 44	16.2%	18.1%	20.3%
45 to 54	23.3%	14.7%	17.1%
55 to 64	26.6%	18.1%	17.5%
65 or above	17.8%	6.9%	5.2%
I prefer not to answer	1.2%	18.1%	6.3%
Average (years):	52	45	43
Base:	1,120	116	713

Question: Which best describes your age? (Select one)

Annual Household Income

Napa Valley visitors are affluent, with approximately half of all survey respondents who report an annual household income above \$100,000. The typical Napa Valley lodging guest has an average annual household income of \$195,000. Napa Valley day-trip visitors have an average annual income of \$154,000 and VFR visitors an annual income of \$145,000.

Chart 27: Annual Household Income
(All Visitors, 2012)



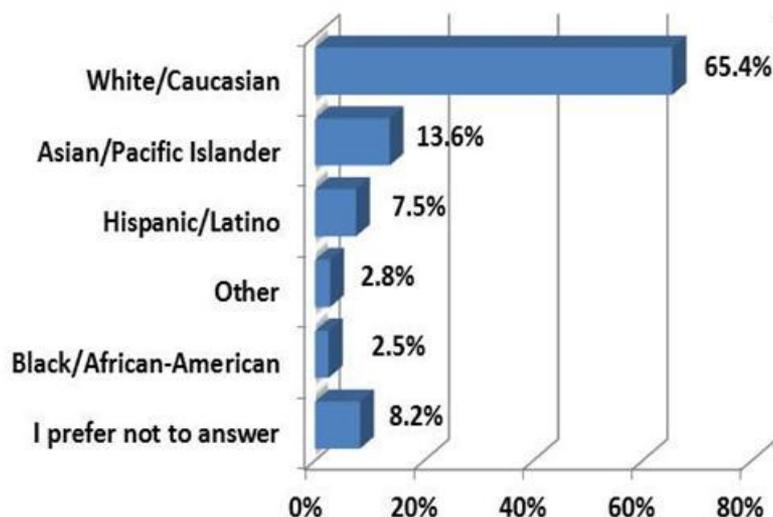
	Lodging Guests	VFR Visitors	Day-trip visitors
Less than \$50,000	4.5%	17.7%	11.6%
\$50,001 to \$100,000	16.5%	16.8%	24.6%
\$100,001 to \$150,000	20.5%	15.0%	15.7%
\$150,001 to \$200,000	15.5%	13.3%	13.3%
\$200,001 to \$500,000	19.9%	14.2%	12.3%
Over \$500,000	4.6%	0.9%	3.4%
I prefer not to answer	18.6%	22.1%	19.1%
Average (years):	\$195K	\$145K	\$154K
Base:	1,087	113	700

Question: Which best describes the combined annual income of all members of your household? (Select one)

Ethnicity

Approximately two-thirds of Napa visitors identify as Caucasian (65.4%). Day-trip visitors are more ethnically diverse, with over one-third who report an ethnicity other than Caucasian (34.3% versus 11.8% of lodging guests and 10.8% of VFRs).

Chart 28: Ethnicity
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

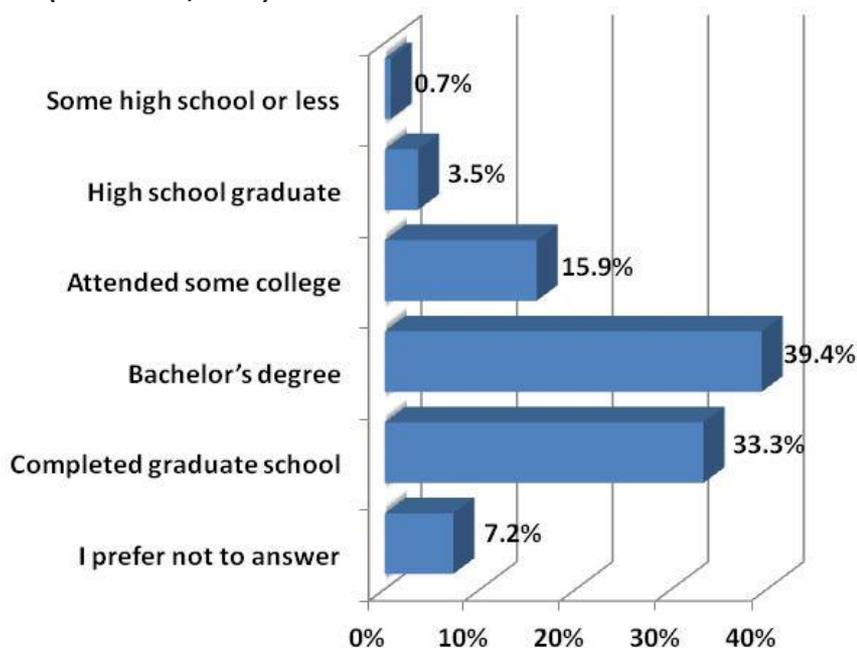
	Lodging Guests	VFR Visitors	Day-trip visitors
White/Caucasian	80.8%	73.9%	57.6%
Hispanic/Latino	2.9%	1.8%	10.0%
Black/African-American	2.2%	0.0%	2.8%
Asian/Pacific Islander	4.7%	7.2%	18.3%
Other	2.0%	1.8%	3.2%
I prefer not to answer	7.5%	15.3%	8.1%
Base:	1,115	111	689

Question: Which best describes your race or ethnic background?
(Select one)

Education

Commensurate with their income, Napa Valley’s visitors are well educated. Nearly three quarters of visitors have at least a bachelor’s degree, including one-third who hold a graduate degree.

Chart 29: Education
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

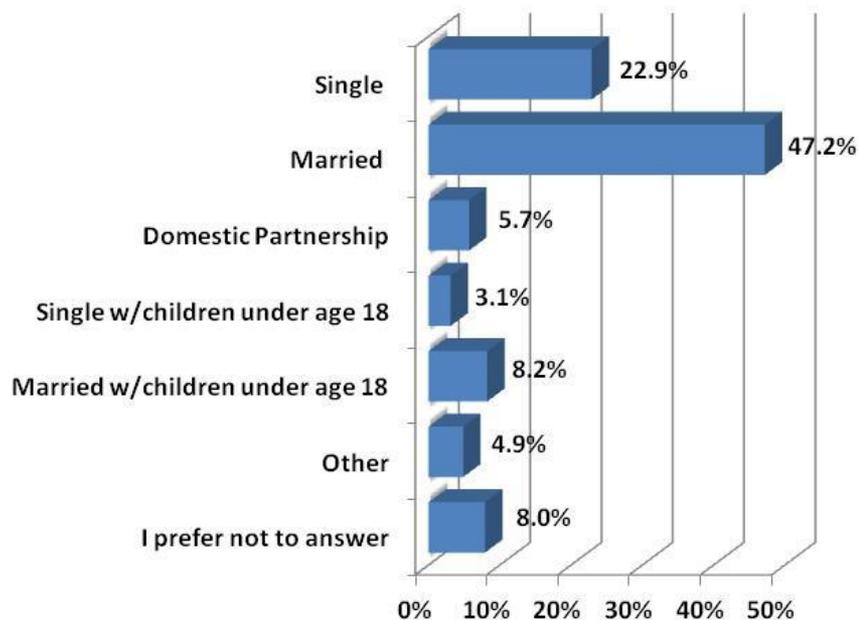
	Lodging Guests	VFR Visitors	Day-trip visitors
Some high school or less	0.3%	0.0%	0.9%
High school graduate	2.6%	0.9%	4.1%
Attended some college	15.3%	14.5%	16.3%
Bachelor's degree	38.3%	40.0%	39.9%
Completed graduate school	39.6%	30.0%	30.6%
I prefer not to answer	3.9%	14.5%	8.3%
Base:	1,104	110	689

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

Marital Status

Over 60 percent of Napa Valley’s visitors are married or partnered. Approximately one in four is single. 11.3 percent have children under age 18.

Chart 30: Marital Status
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

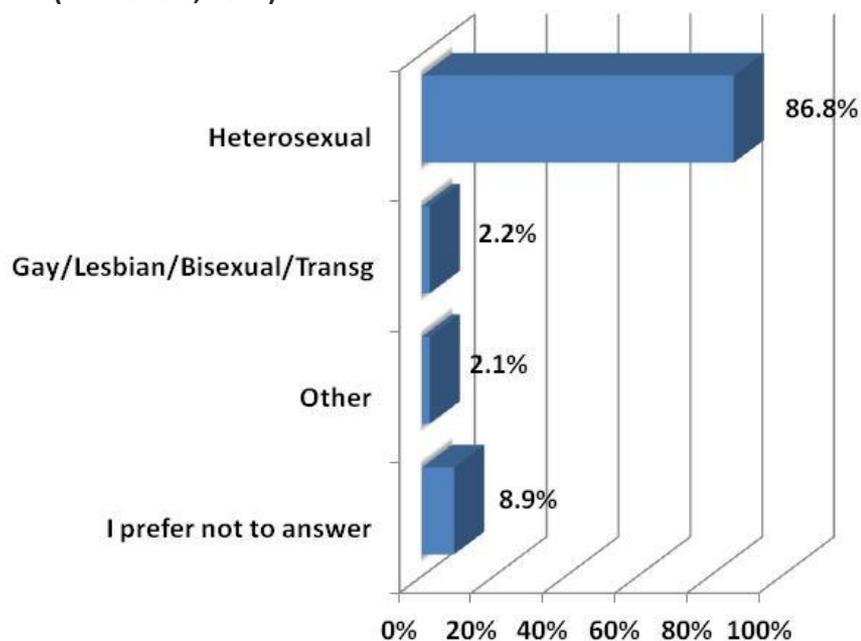
	Lodging Guests	VFR Visitors	Day-trip visitors
Single	14.7%	21.7%	26.8%
Married	60.3%	45.2%	41.3%
Domestic Partnership	9.6%	2.6%	4.1%
Single w/children under age 18	3.9%	1.7%	2.8%
Married w/children under age 18	1.5%	9.6%	11.3%
I prefer not to answer	7.5%	14.8%	7.7%
Other	2.4%	4.3%	6.1%
Base:	1,121	115	710

Question: Which best describes your marital status? (Select one)

Sexual Orientation

2.2 percent of all survey respondents identifies as GLBT.

Chart 31: Sexual Orientation
(All Visitors, 2012)



(Percent of all Napa Valley visitors)

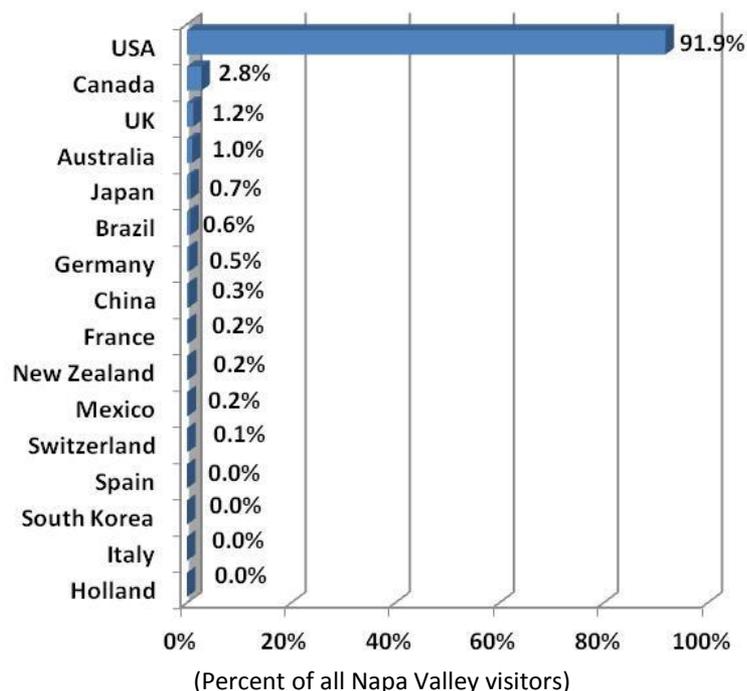
	Lodging Guests	VFR Visitors	Day-trip visitors
Heterosexual	89.4%	78.6%	86.0%
Gay / Lesbian / Bisexual / Transgender	2.3%	2.7%	2.0%
Other	0.8%	0.0%	2.9%
I prefer not to answer	7.5%	18.8%	9.0%
Base:	1,108	112	688

Question: Which best describes you?

Point of Origin: Country

91.9 percent of all Napa Valley visitors reside in the United States. Canada (2.8%), the UK (1.2%) and Australia (1.0%) are the top international feeder markets to Napa Valley.

Chart 32: Feeder Markets – Top Countries
(All Visitors, 2012)



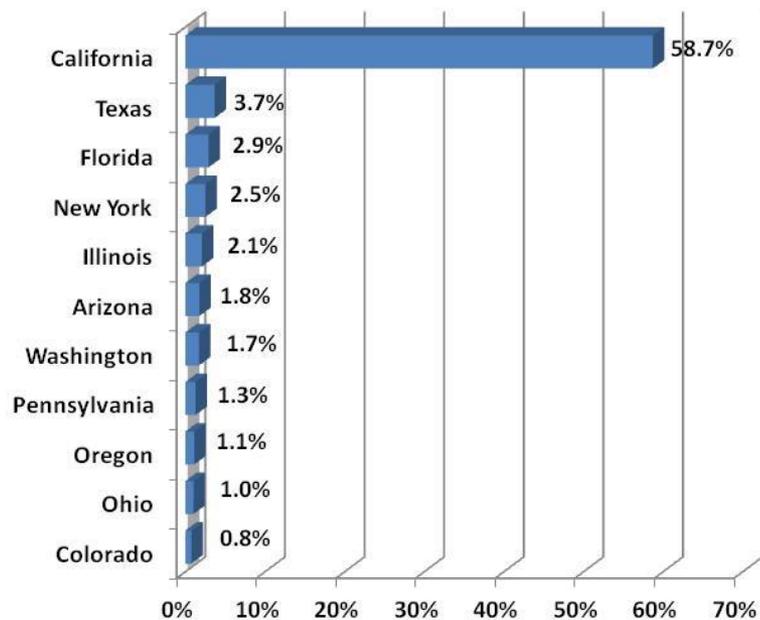
	Lodging Guests	VFR Visitors	Day-trip visitors
USA	93.4%	92.5%	91.3%
Canada	3.1%	2.5%	2.7%
UK	1.3%	0.8%	1.1%
Australia	0.6%	0.0%	1.3%
Japan	0.6%	1.7%	0.7%
Brazil	0.0%	0.0%	1.0%
Germany	0.2%	0.8%	0.6%
China	0.1%	0.8%	0.4%
France	0.2%	0.0%	0.3%
New Zealand	0.1%	0.0%	0.3%
Mexico	0.0%	0.0%	0.3%
Switzerland	0.0%	0.8%	0.1%
Holland	0.1%	0.0%	0.0%
Italy	0.1%	0.0%	0.0%
South Korea	0.1%	0.0%	0.0%
Spain	0.1%	0.0%	0.0%
Base:	1,113	120	709

Question: Country of residence

Point of Origin: State

Nearly 60 percent of domestic visitors to Napa Valley reside in the state of California. 3.7 percent live in Texas, 2.9 percent are from Florida and 2.5 percent are from New York.

Chart 33: Feeder Markets – Top States of Residence
(Domestic Visitors, 2012)



(Percent of domestic Napa Valley visitors)

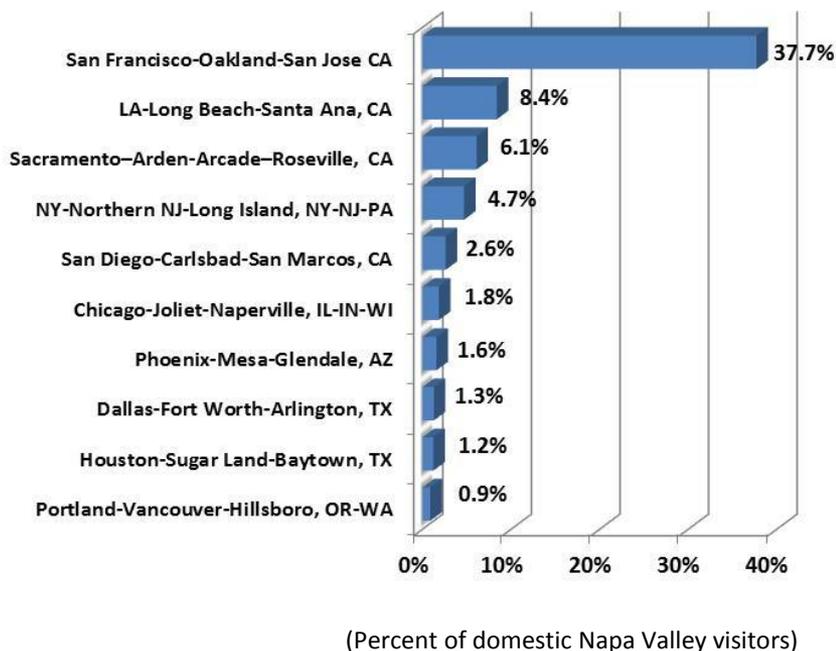
	Lodging Guests	VFR Visitors	Day-trip visitors
California	50.5%	43.2%	63.6%
Texas	4.7%	8.1%	2.9%
Florida	3.8%	1.8%	2.6%
New York	2.8%	1.8%	2.5%
Illinois	2.6%	4.5%	1.7%
Arizona	1.3%	4.5%	1.8%
Washington	1.6%	2.7%	1.7%
Pennsylvania	2.0%	1.8%	0.9%
Oregon	1.4%	1.8%	0.9%
Ohio	1.2%	1.8%	0.9%
Colorado	2.0%	0.9%	0.2%
Base:	1,038	111	651

Question: State of residence

Point of Origin: MSA

37.7 percent of all domestic Napa Valley visitors come from the San Francisco-Oakland-San Jose metropolitan statistical area (MSA). 8.4 percent reside in the Los Angeles-Long Beach-Santa Ana MSA, and 6.1 percent visit from the Sacramento-Arden-Arcade-Roseville MSA.

Chart 34: Feeder Markets – Top Metro Areas
(Domestic Visitors, 2012)



	Lodging Guests	VFR Visitors	Day-trip visitors
San Francisco-Oakland-San Jose, CA	28.3%	20.7%	43.2%
Los Angeles-Long Beach-Santa Ana, CA	7.6%	8.1%	8.8%
Sacramento-Arden-Arcade-Roseville, CA	4.6%	6.3%	6.8%
New York-Northern New Jersey-Long Island, NY-NJ-PA	5.2%	4.5%	4.5%
San Diego-Carlsbad-San Marcos, CA	2.6%	2.7%	2.6%
Chicago-Joliet-Naperville, IL-IN-WI	2.0%	5.4%	1.5%
Phoenix-Mesa-Glendale, AZ	1.1%	3.6%	1.7%
Dallas-Fort Worth-Arlington, TX	2.3%	1.8%	0.8%
Houston-Sugar Land-Baytown, TX	1.4%	4.5%	0.9%
Portland-Vancouver-Hillsboro, OR-WA	1.2%	2.7%	0.6%
Base:	1,038	111	651

Question: Metropolitan Statistical Area of residence