



**Visit Napa Valley**  
**2014 Napa Valley Visitor Profile**  
**Report of Findings**

March 2015

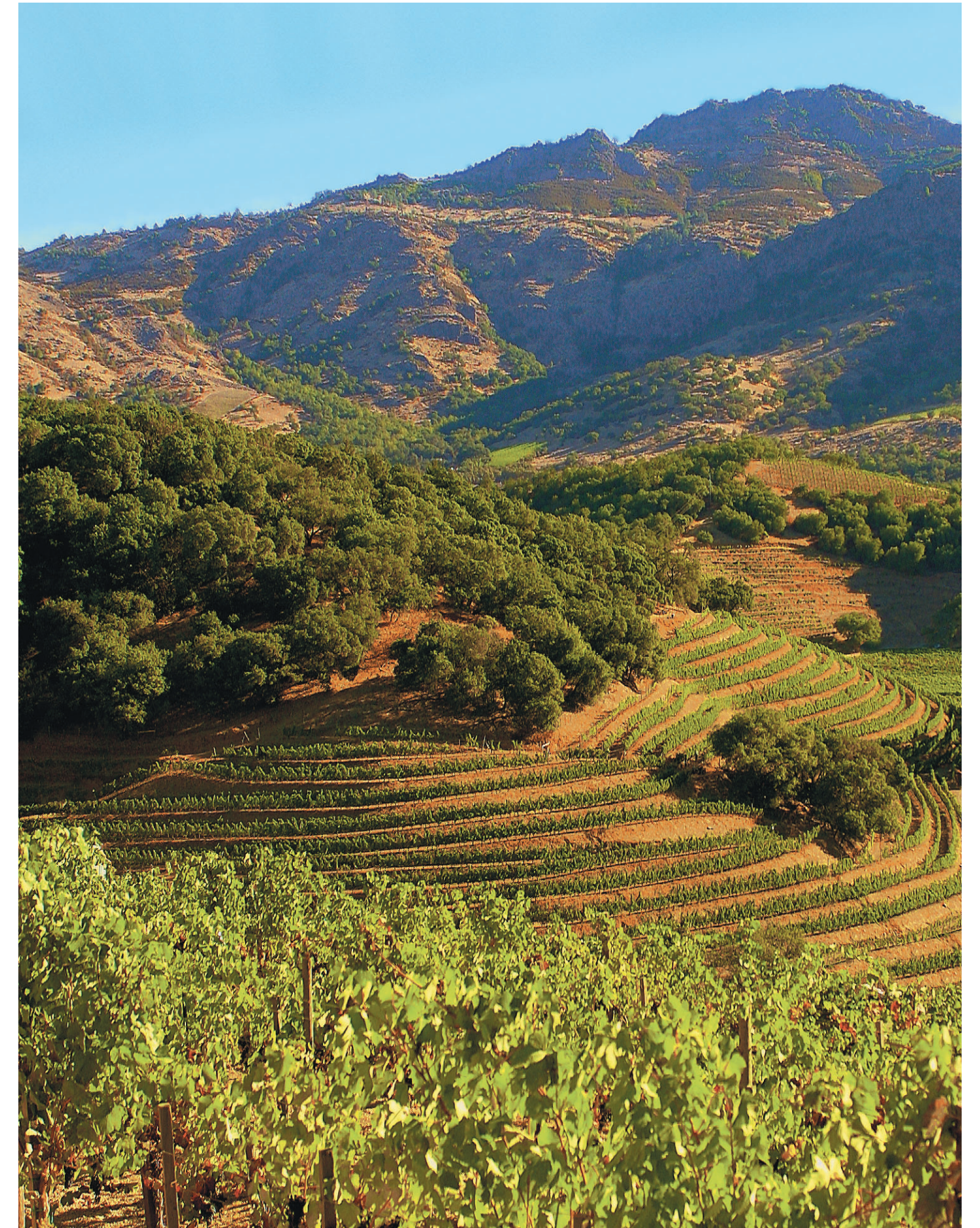
Report of Findings prepared for Visit Napa Valley by Destination Analysts, Inc.



# Research Overview

This report presents findings of a year-long visitor profile study conducted by Destination Analysts on behalf of Visit Napa Valley. This research consisted of three parts:

- 1) Napa Valley Lodging Guest Survey
- 2) Napa Valley Visitor Intercept Survey of day-trip visitors and visiting friends or relatives staying overnight in private homes (VFRs).
- 3) Telephone Survey of Napa County Homes conducted at the end of 2014 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.





# Lodging Guest Survey

## Locations:

- Andaz Napa
- Arbor Guest House
- Auberge du Soleil
- Best Western Plus Stevenson Manor
- Calistoga Spa Hot Springs
- Chanric Inn
- Chelsea Garden Inn
- Christopher's Inn
- DoubleTree by Hilton Hotel & Spa Napa Valley-American Canyon
- Embassy Suites Napa Valley
- Eurospa & Inn
- Fairfield Inn & Suites
- Harvest Inn
- Hawthorn Suites by Wyndham
- Holiday Inn Express & Suites
- Mount View Hotel & Spa
- Napa River Inn
- Napa Valley Lodge
- Napa Winery Inn
- Oak Knoll Inn
- Old World Inn
- River Terrace Inn
- Roman Spa Hot Springs Resort
- Silverado Resort
- Southbridge Napa Valley
- The Carneros Inn
- The Inn On first
- The Meritage Resort & Spa
- The Westin Verasa Napa
- The Wine Country Inn
- Vintage Inn & Villagio

# Visitor Intercept Survey

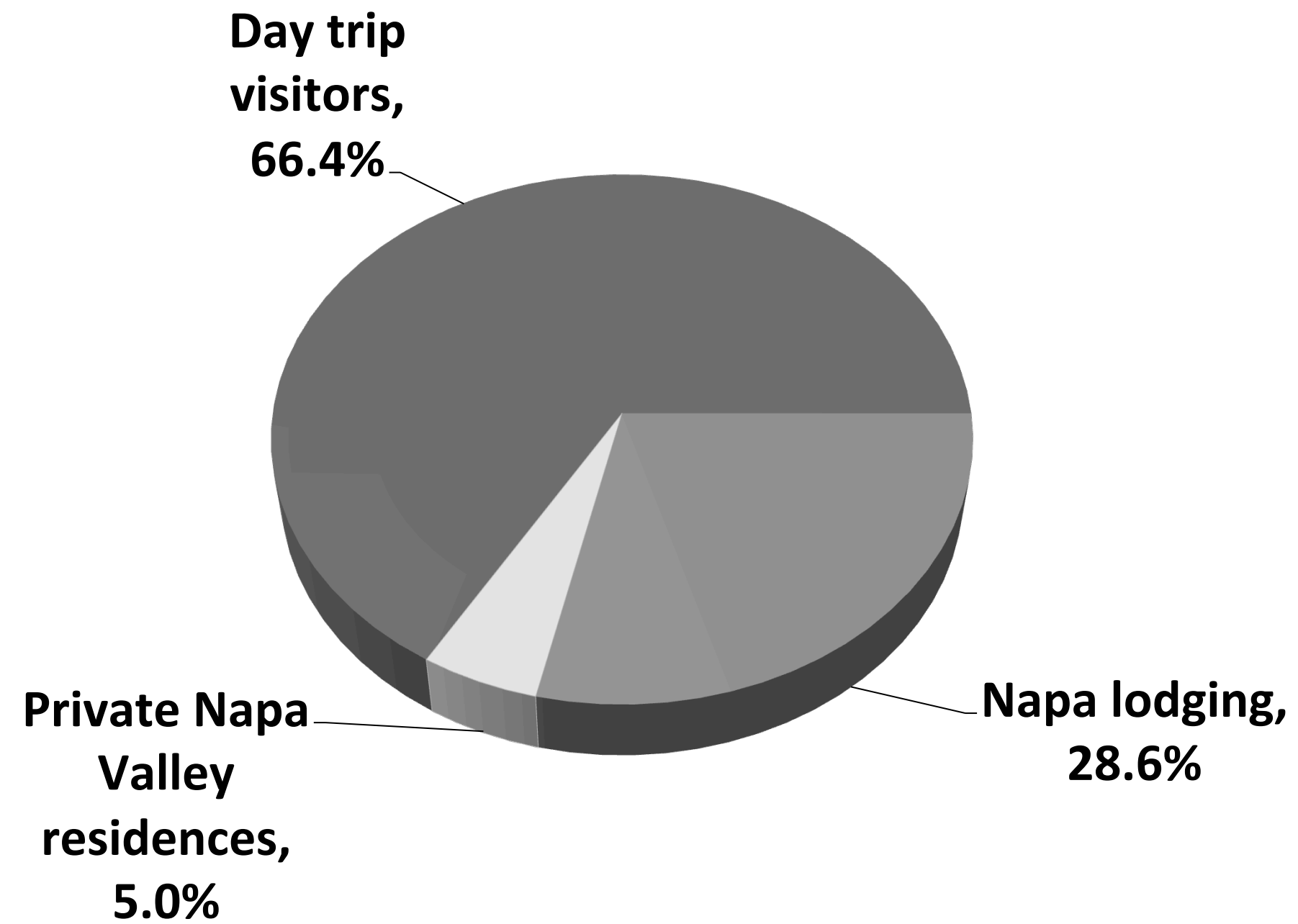
## Locations:

- Castello di Amorosa
- Chateau Montelena Winery
- Culinary Institute of America-Greystone
- Cuvaison Estate Wines
- di Rosa
- Duckhorn Vineyards
- HALL Wines
- Napa Premium Outlets
- Napa Valley Welcome Center
- Napa Valley Wine Train
- Pine Ridge Vineyards
- Robert Mondavi Winery
- Sterling Vineyards
- The Hess Collection
- V Marketplace
- V. Sattui Winery
- Yountville Chamber of Commerce



# Visitor Volume, 2014

## Visitor Volume, 2014



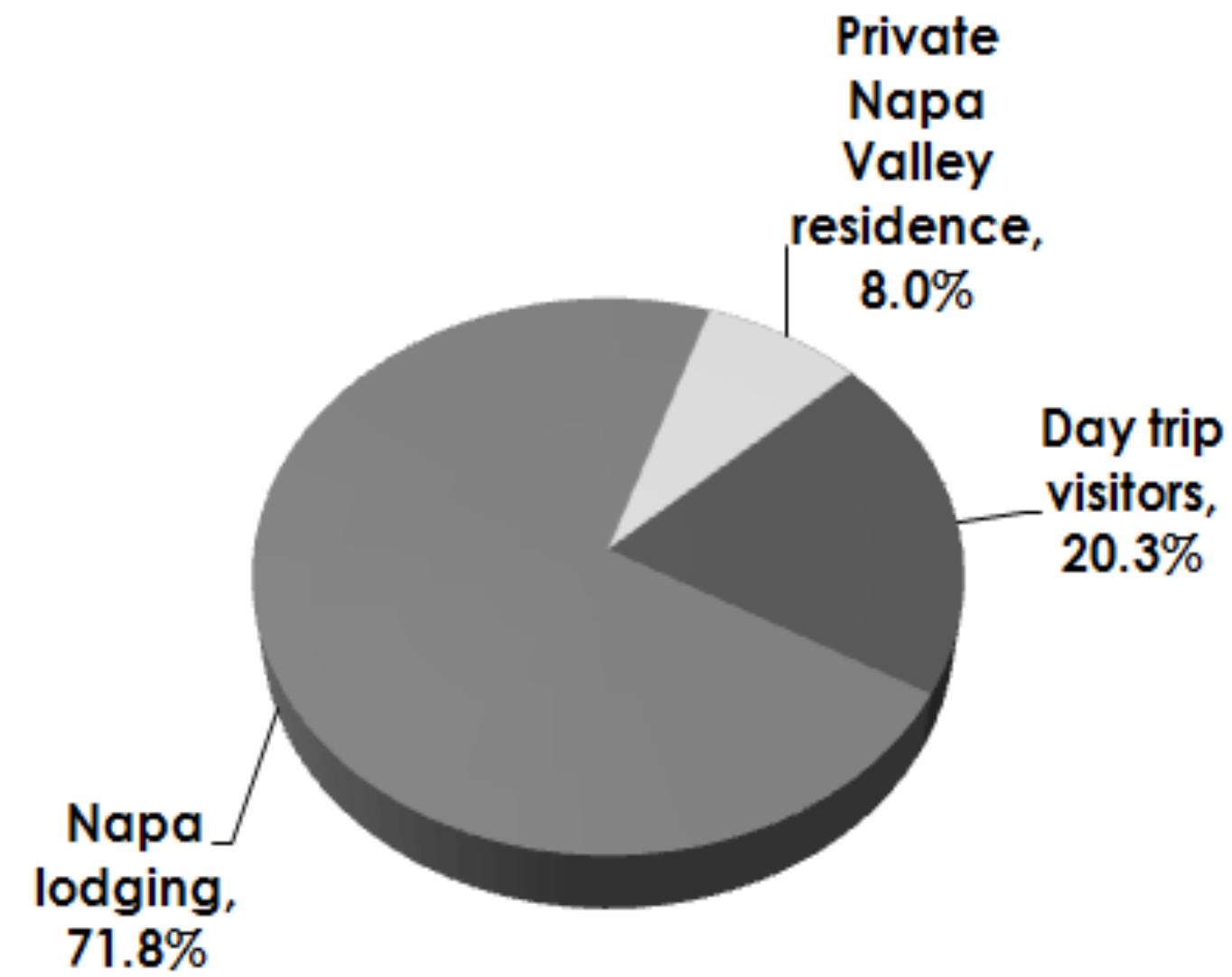
## Visitors to Napa Valley (thousands)

Napa Valley Lodging	951
Private Napa Valley residences	166
Day trip visitors	2,211
<b>Total</b>	<b>3,329</b>



# Visitor Days Spent in Napa Valley, 2014

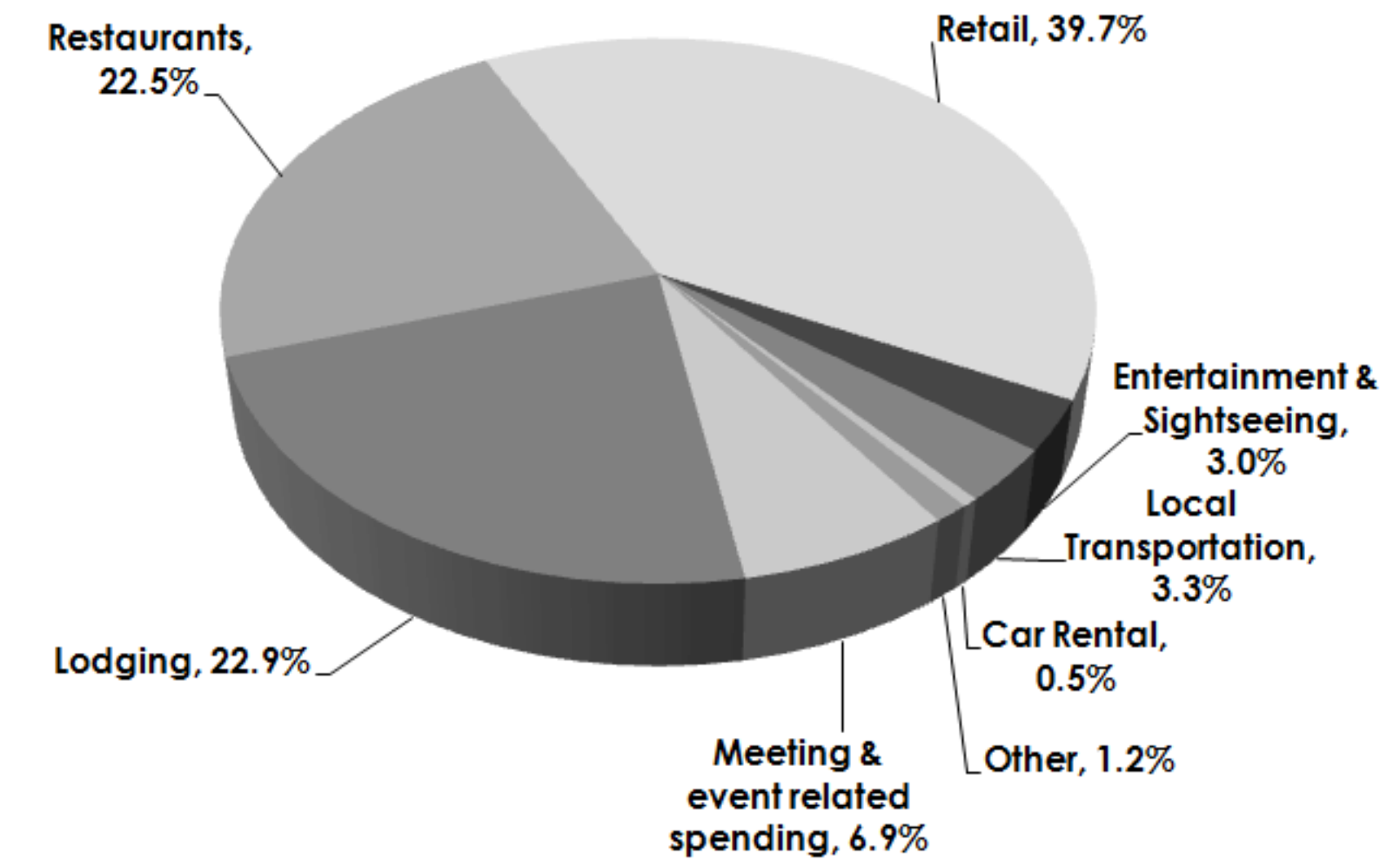
## Direct Visitor Spending in Napa Valley, 2014



### Direct Visitor Spending in Napa (thousands)

Napa lodging	\$1,173,133
Private Napa residences	\$130,711
Day trip visitors	\$331,135
<b>Total</b>	<b>\$1,634,979</b>

## Direct Visitor Spending by Type, 2014



### SPENDING IN NAPA, BY TYPE (IN THOUSANDS)

Lodging	\$375,158
Restaurants	\$367,400
Retail	\$648,813
Entertainment & Sightseeing	\$49,324
Local Transportation	\$53,476
Car Rental	\$8,496
Other	\$18,885
Meeting & event related spending	\$113,427
<b>TOTAL SPENDING</b>	<b>\$1,634,979</b>

# Quick Facts

The profile below shows a summary of key economic statistics emerging from this research.

	2012	2014
Total visitors to Napa Valley in 2014:	2.94 million	3.3 million
Total visitor spending in Napa Valley in 2014:	\$1.39 billion	\$1.63 billion
Spending by visitors staying in Napa Valley hotels, motels or inns:	\$1.03 billion	\$1.17 billion
Direct spending on group meetings & events:	\$187.7 million	\$194.0 million
Spending in Napa Valley by visitors for food and restaurants:	\$301 million	\$375 million
Jobs supported by Napa Valley visitor industry:	10,498	11,776
Napa Valley visitor industry payroll:	\$300 million	\$332 million
Taxes generated by the visitor industry for governmental entities in Napa County:	\$51.7 million	\$64.2 million
Tax revenues generated per Napa Valley household:	\$1,041	\$1,304
Visitors in Napa Valley on an average day:	13,409	15,019
Visitor spending in Napa Valley on an average day:	\$3.82 million	\$4.48 million
Annual visitor spending per Napa Valley resident:	\$10,027	\$11,741



# Detailed Findings

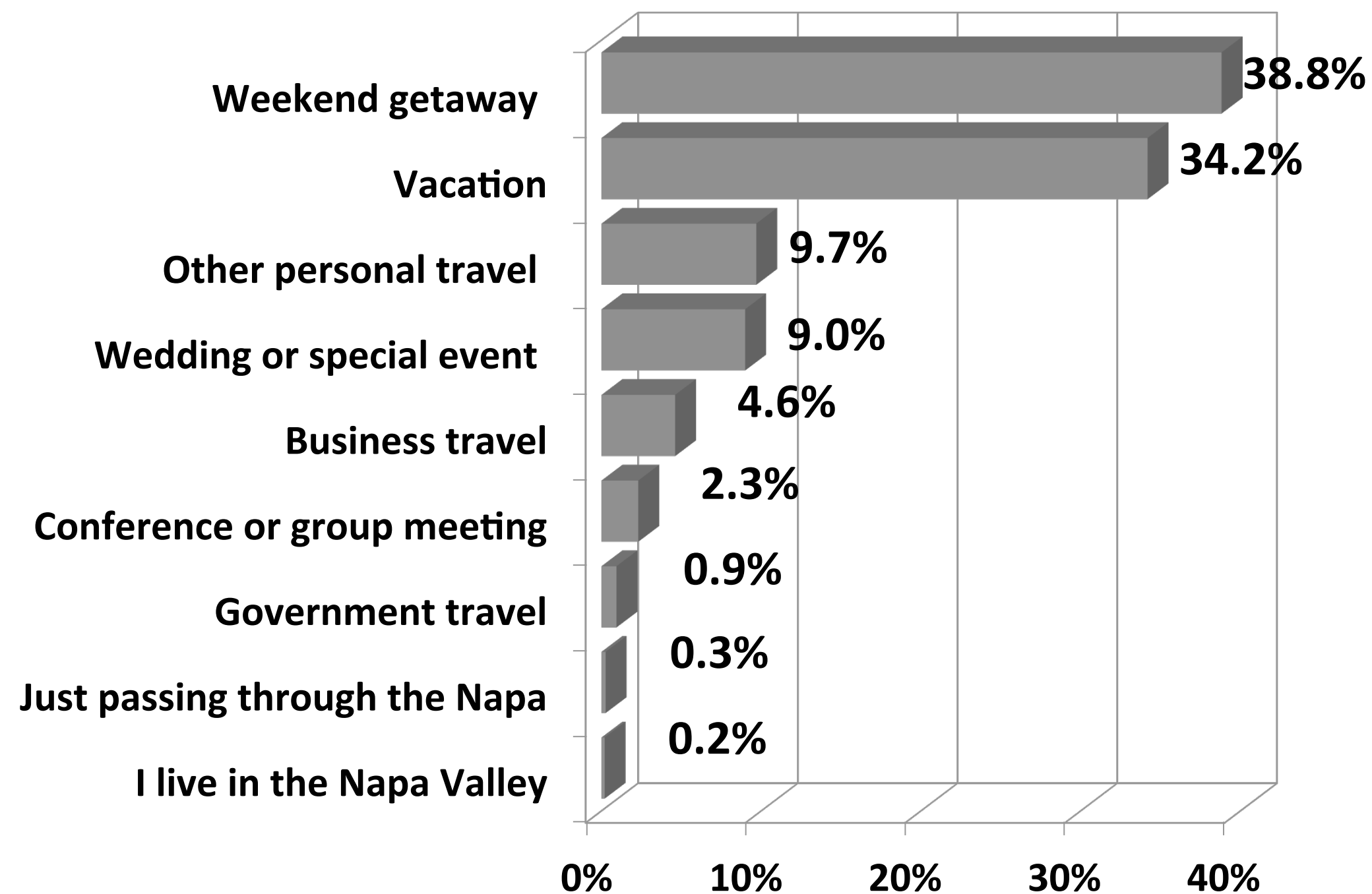




# Primary Reason for Visiting Napa

In 2014 Napa Valley visitors primarily came to the area for leisure purposes.

Chart 1: Primary Reason for Visit  
(All Visitors)



Base: All respondents. 1,740 completed surveys

Detail by Type of Visitor

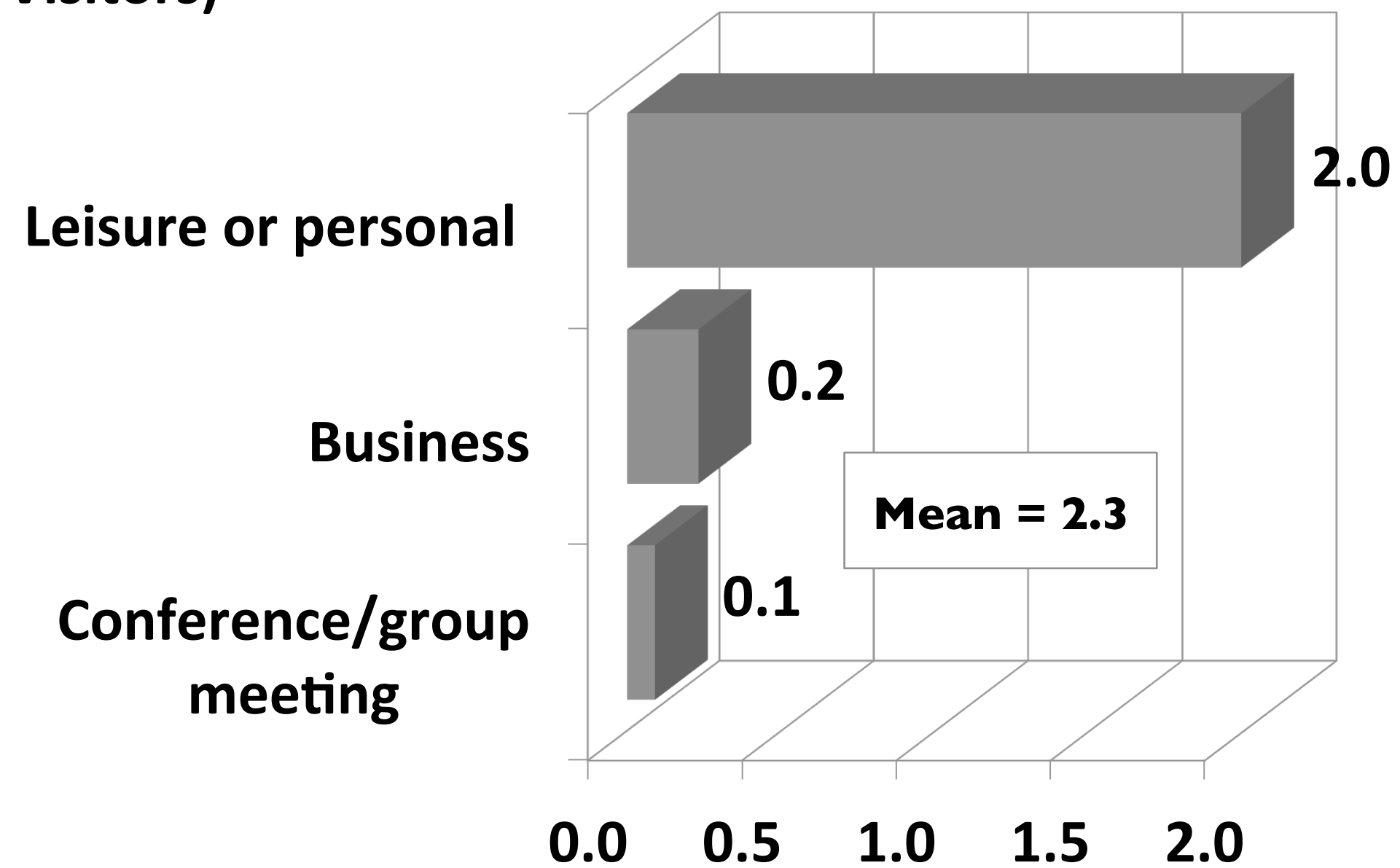
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Weekend getaway	38.8%	33.6%	34.5%	41.6%
Vacation	34.2%	37.1%	48.6%	31.7%
Other personal travel	9.7%	6.0%	2.0%	12.0%
Wedding or special event	9.0%	12.8%	10.1%	7.1%
Business travel	4.6%	3.6%	2.0%	5.3%
Conference or group meeting	2.3%	2.4%	2.0%	2.3%
Government travel	0.9%	3.0%	0.7%	0.0%
Just passing through the Napa area	0.3%	0.9%	0.0%	0.0%
I live in the Napa Valley	0.2%	0.7%	0.0%	0.0%
<b>Base</b>	<b>1,740</b>	<b>519</b>	<b>90</b>	<b>1,131</b>

Question: Which best describes the trip you are currently on?

# Visits to Napa Valley in Past Twelve Months

The Napa Valley draws a substantial amount of repeat visitation.

Chart 2: Visits to Napa Valley in Past Twelve Months  
(All Visitors)



Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Leisure or personal	2.0	1.7	1.9	2.2
Business	0.2	0.3	0.2	0.2
Conference/ group meeting	0.1	0.1	0.0	0.1
<b>Base</b>	<b>1,497</b>	<b>487</b>	<b>71</b>	<b>939</b>

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?

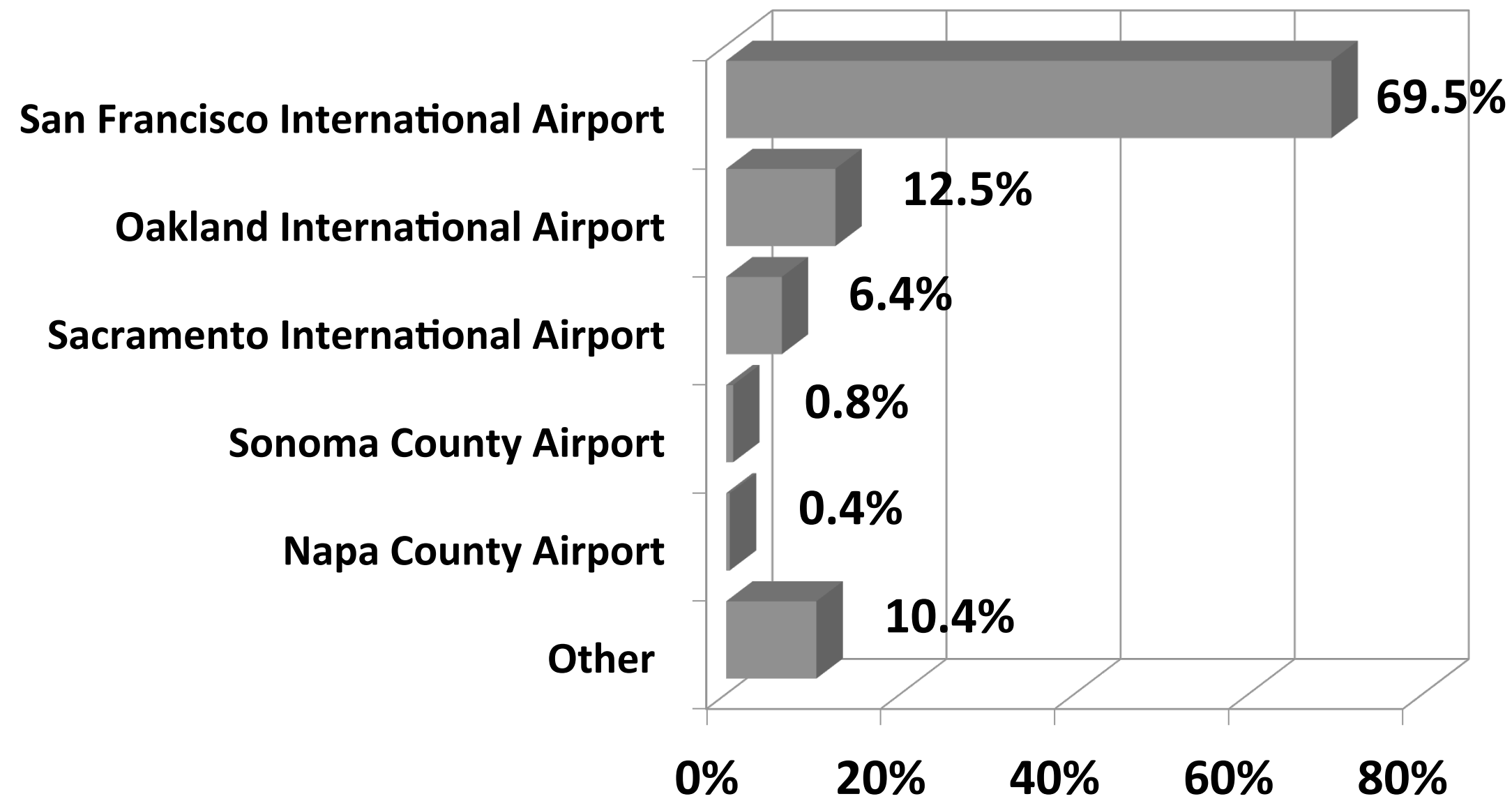
Base: All respondents. 1,497 completed surveys



# Airport Used

San Francisco International Airport was, by far, the most commonly used airport by Napa Valley visitors.

Chart 3: Airport Used  
(Visitors arriving by air)



Base: Respondents who arrived by airplane. 833 completed surveys

Detail by Type of Visitor

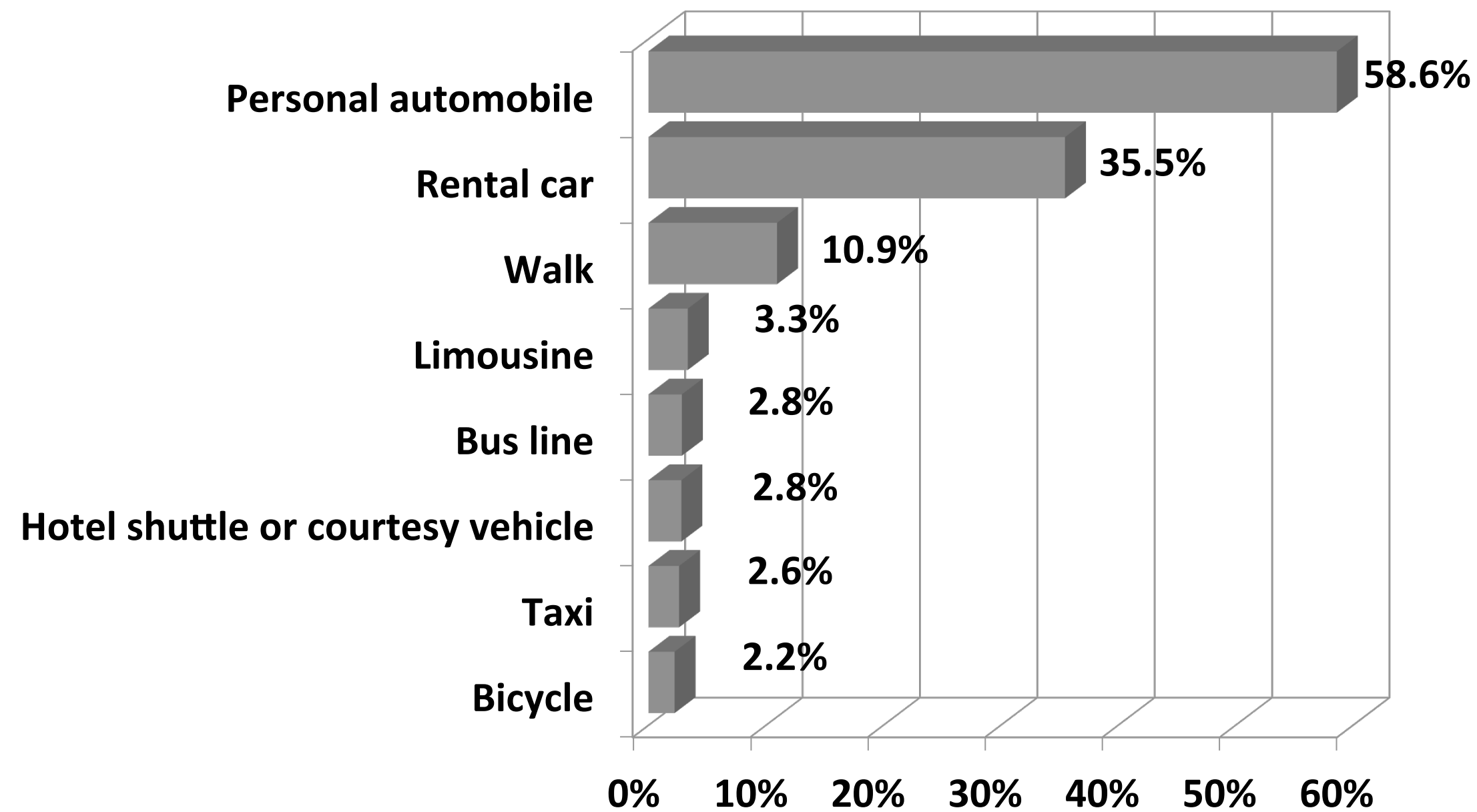
	All visitors arriving by air	Lodging Guests	Visiting friends & relatives	Day-trip
San Francisco International Airport	69.5%	68.7%	68.0%	70.1%
Oakland International Airport	12.5%	15.1%	14.6%	11.2%
Sacramento International Airport	6.4%	10.0%	5.8%	4.8%
Sonoma County Airport	0.8%	0.7%	0.0%	0.9%
Napa County Airport	0.4%	1.2%	1.0%	0.0%
Other	10.4%	4.3%	10.7%	13.0%
<b>Base</b>	<b>833</b>	<b>236</b>	<b>63</b>	<b>535</b>

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

# Transportation Used In-Market

Nearly all Napa Valley visitors traveled within the area via automobile (94.1%).

Chart 4: Transportation Methods  
(All Visitors)



Base: All respondents. 1,816 completed surveys

Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Personal automobile	58.6%	54.9%	41.6%	61.6%
Rental car	35.5%	38.8%	50.3%	32.9%
Walk	10.9%	23.5%	10.7%	5.5%
Limousine	3.3%	6.1%	1.3%	2.3%
Bus line	2.8%	2.4%	4.0%	3.0%
Hotel shuttle or courtesy vehicle	2.8%	7.3%	1.3%	0.9%
Taxi	2.6%	5.0%	4.0%	1.5%
Bicycle	2.2%	3.8%	6.7%	1.2%
<b>Base</b>	<b>1,816</b>	<b>524</b>	<b>91</b>	<b>1,202</b>

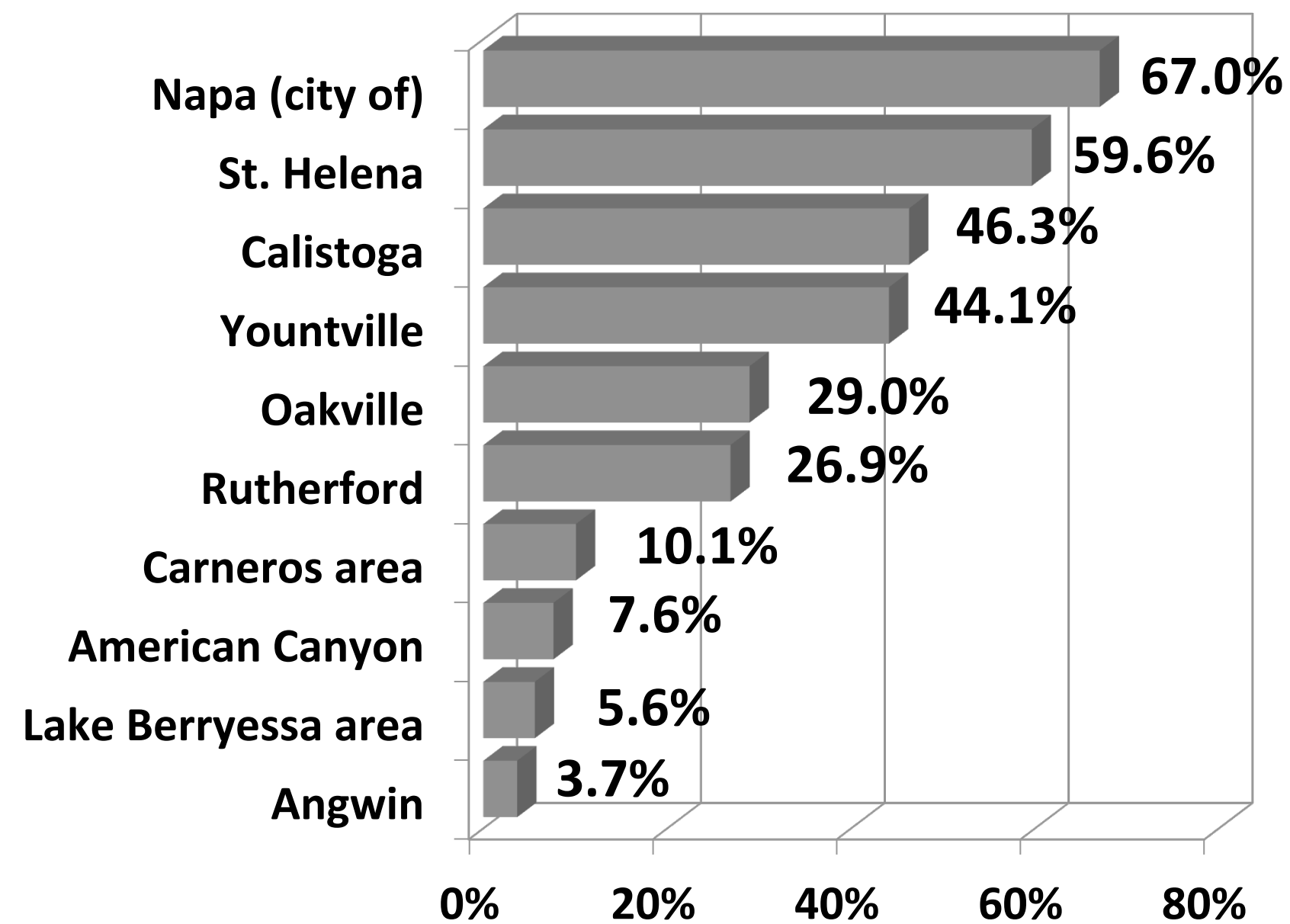
Question: On this trip, which methods of transportation will you utilize while in the Napa Valley?



# Napa Valley Towns Visited

Visitors to the Napa Valley tend to visit multiple towns within the area.

Chart 5: Napa Valley Towns Visited  
(All Visitors)



Base: All respondents. 1,809 completed surveys

Detail by Type of Visitor

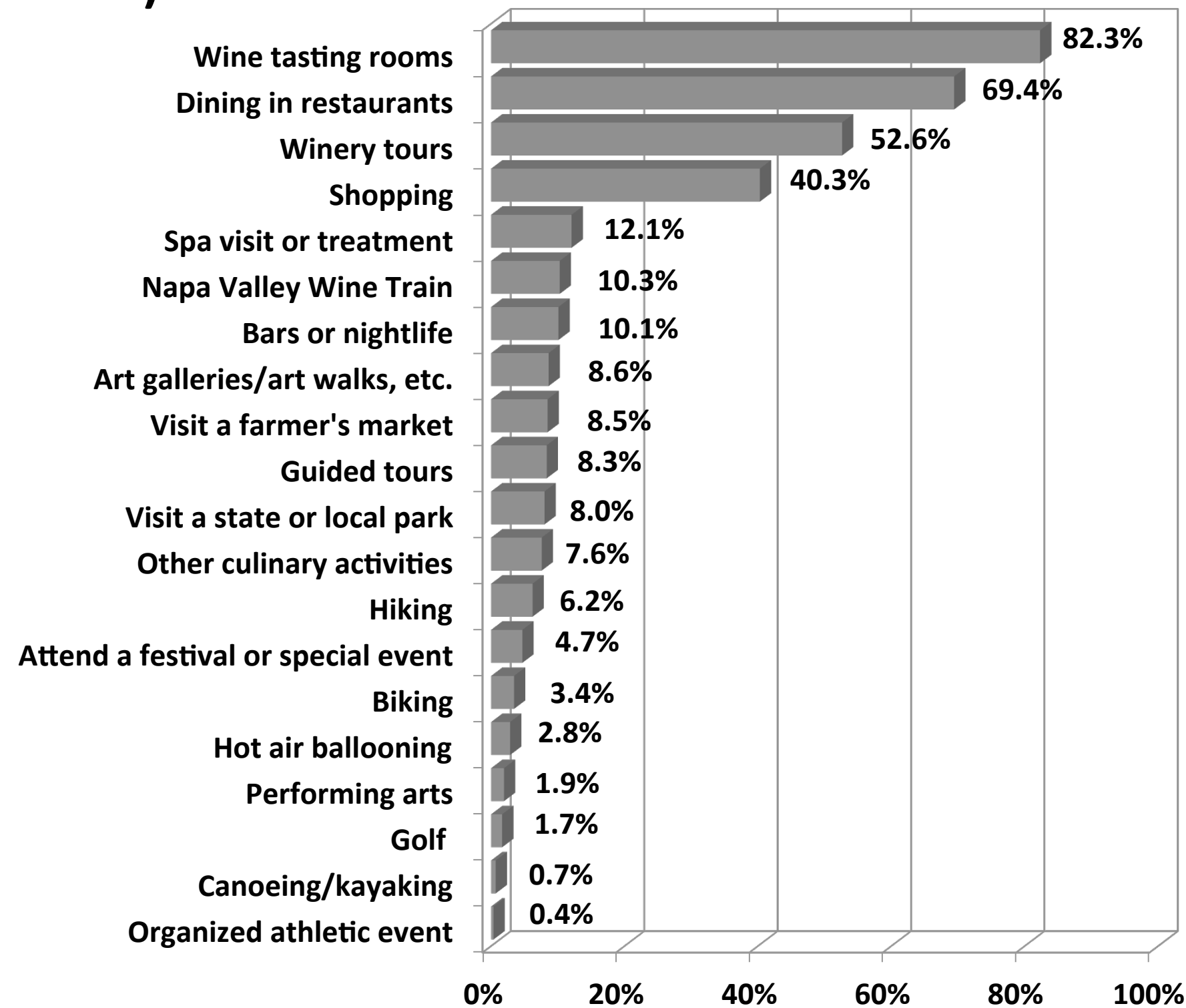
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Napa (city of)	67.0%	64.5%	73.2%	67.7%
St. Helena	59.6%	62.8%	74.5%	57.2%
Calistoga	46.3%	57.8%	55.7%	40.7%
Yountville	44.1%	51.4%	61.1%	39.7%
Oakville	29.0%	24.9%	35.6%	30.2%
Rutherford	26.9%	30.6%	34.9%	24.7%
Carneros area	10.1%	12.3%	10.1%	9.1%
American Canyon	7.6%	7.7%	8.7%	7.5%
Lake Berryessa area	5.6%	3.3%	7.4%	6.4%
Angwin	3.7%	2.5%	7.4%	3.9%
<b>Base</b>	<b>1,809</b>	<b>515</b>	<b>91</b>	<b>1,203</b>

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

# Activities and Attractions in Napa Valley

Napa Valley visitors engage in a myriad of activities during their trip.

**Chart 6: Activities and Attractions  
(All Visitors)**



Base: All respondents. 1,822 completed surveys

**Detail by Type of Visitor**

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine tasting rooms	82.3%	72.3%	89.9%	85.9%
Dining in restaurants	69.4%	89.2%	79.2%	60.3%
Winery tours	52.6%	40.7%	67.8%	56.5%
Shopping	40.3%	55.3%	51.0%	33.2%
Spa visit or treatment	12.1%	27.2%	13.4%	5.6%
Napa Valley Wine Train	10.3%	7.5%	14.8%	11.1%
Bars or nightlife	10.1%	16.0%	19.5%	6.9%
Art galleries/art walks, etc.	8.6%	14.2%	18.1%	5.6%
Visit a farmer's market	8.5%	11.6%	13.4%	6.8%
Guided tours	8.3%	6.0%	12.1%	9.0%
Visit a state or local park	8.0%	11.3%	14.8%	6.1%
Other culinary activities	7.6%	7.8%	12.1%	7.2%
Hiking	6.2%	9.3%	11.4%	4.5%
Attend a festival or special event	4.7%	9.0%	9.4%	2.5%
Biking	3.4%	5.0%	10.1%	2.3%
Hot air ballooning	2.8%	3.1%	4.0%	2.7%
Performing arts	1.9%	4.5%	2.7%	0.8%
Golf	1.7%	3.6%	2.0%	0.8%
Canoeing/kayaking	0.7%	0.2%	2.0%	0.8%
Organized athletic event	0.4%	0.3%	0.0%	0.4%
<b>Base</b>	<b>1,822</b>	<b>514</b>	<b>91</b>	<b>1,218</b>

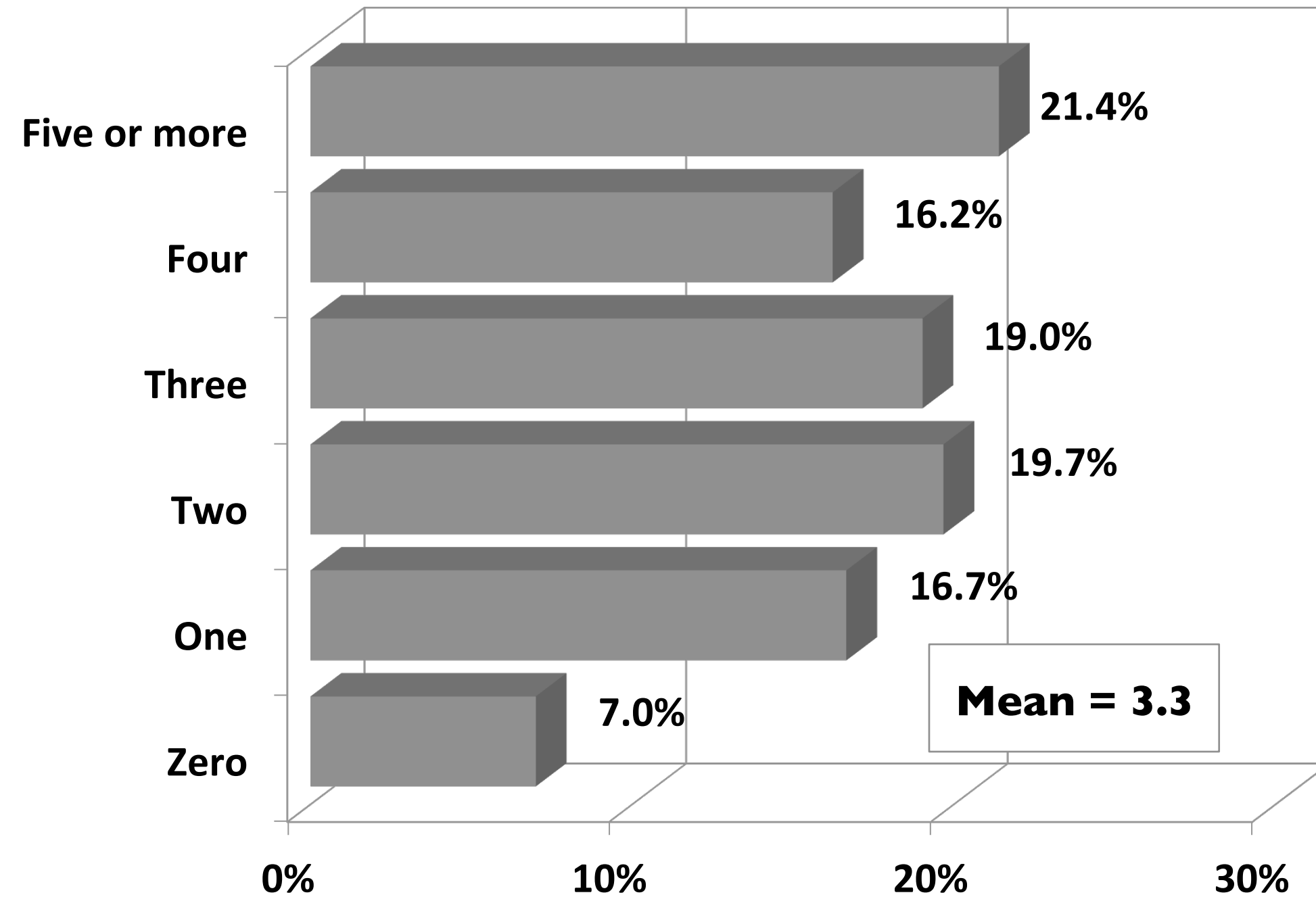
Question: On this trip, in which activities or attractions will you participate while in the Napa Valley?



# Napa Valley Wineries Visited

Napa Valley visitors frequent multiple wineries during their visit.

Chart 7: Napa Valley Wineries Visited (All Visitors)



Base: All respondents. 1,740 completed surveys

Detail by Type of Visitor

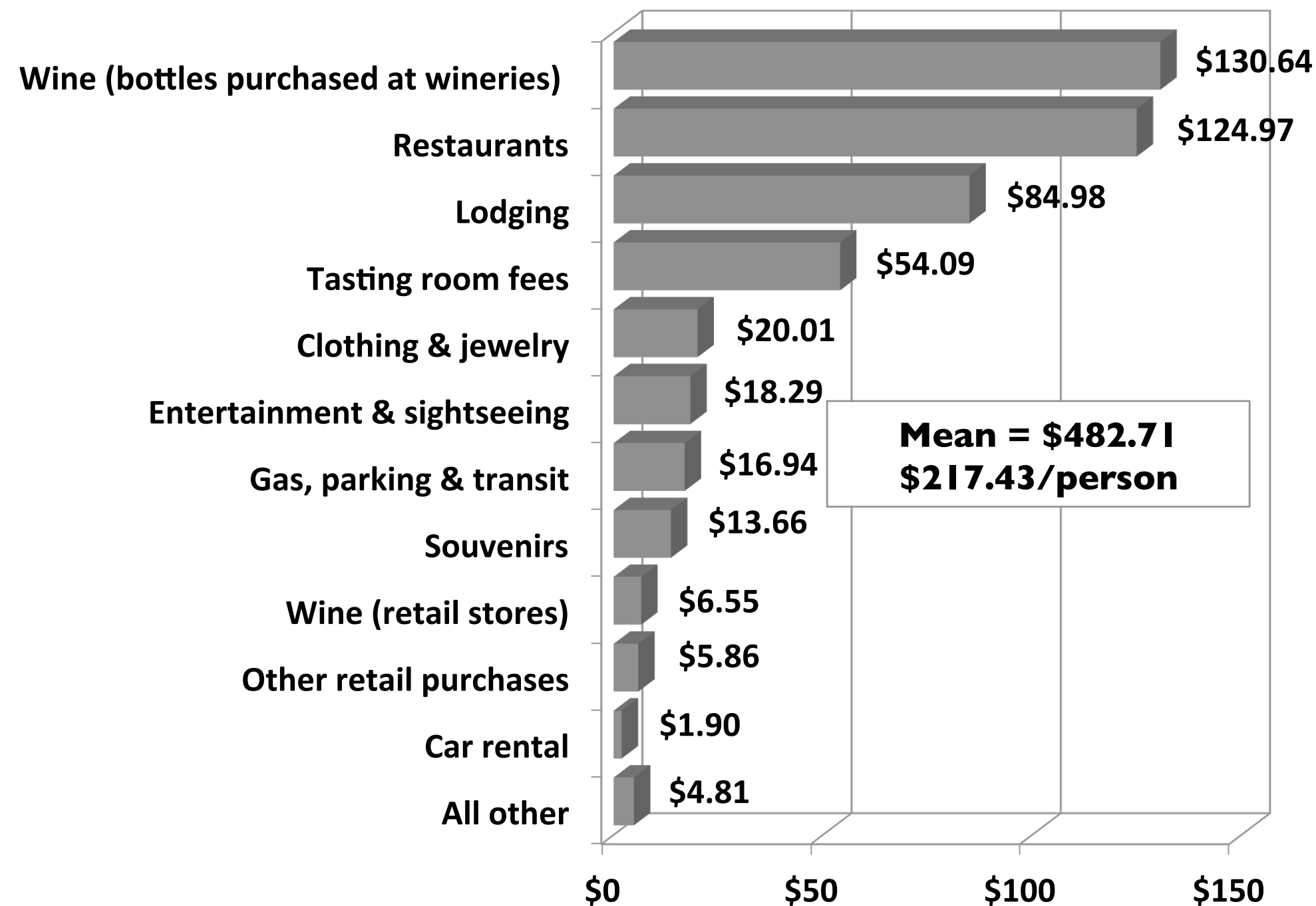
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Five or more	21.4%	31.4%	38.0%	15.7%
Four	16.2%	12.1%	18.3%	17.9%
Three	19.0%	10.6%	17.6%	22.9%
Two	19.7%	16.4%	15.5%	21.5%
One	16.7%	12.7%	9.9%	18.9%
Zero	7.0%	16.8%	0.7%	3.1%
<b>Mean</b>	<b>3.3</b>	<b>3.7</b>	<b>4.5</b>	<b>3.1</b>
<b>Base</b>	<b>1,740</b>	<b>510</b>	<b>87</b>	<b>1,144</b>

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

# Spending in Napa Valley

In 2014, Napa Valley visitors spent an average of \$482.71 per day in-market.

Chart 14: Spending in Napa Valley  
(All Visitors)



Base: All respondents. 1,848 completed surveys

Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine (bottles purchased at wineries)	\$130.64	\$172.12	\$175.63	\$110.22
Restaurants	\$124.97	\$172.18	\$181.71	\$100.28
Lodging	\$84.98	\$280.43	\$31.12	\$7.19
Tasting room fees	\$54.09	\$49.85	\$57.81	\$55.56
Clothing & jewelry	\$20.01	\$34.11	\$34.71	\$13.46
Entertainment & sightseeing	\$18.29	\$19.61	\$29.37	\$16.98
Gas, parking & transit	\$16.94	\$27.72	\$21.23	\$12.32
Souvenirs	\$13.66	\$15.45	\$13.42	\$12.98
Wine (retail stores)	\$6.55	\$10.12	\$7.80	\$5.10
Other retail purchases	\$5.86	\$7.87	\$10.36	\$4.78
Car rental	\$1.90	\$5.78	\$1.89	\$0.46
All other	\$4.81	\$11.92	\$4.50	\$2.21
<b>Mean</b>	<b>\$482.71</b>	<b>\$807.18</b>	<b>\$569.55</b>	<b>\$341.53</b>
<b>Base</b>	<b>1,848</b>	<b>528</b>	<b>92</b>	<b>1,228</b>

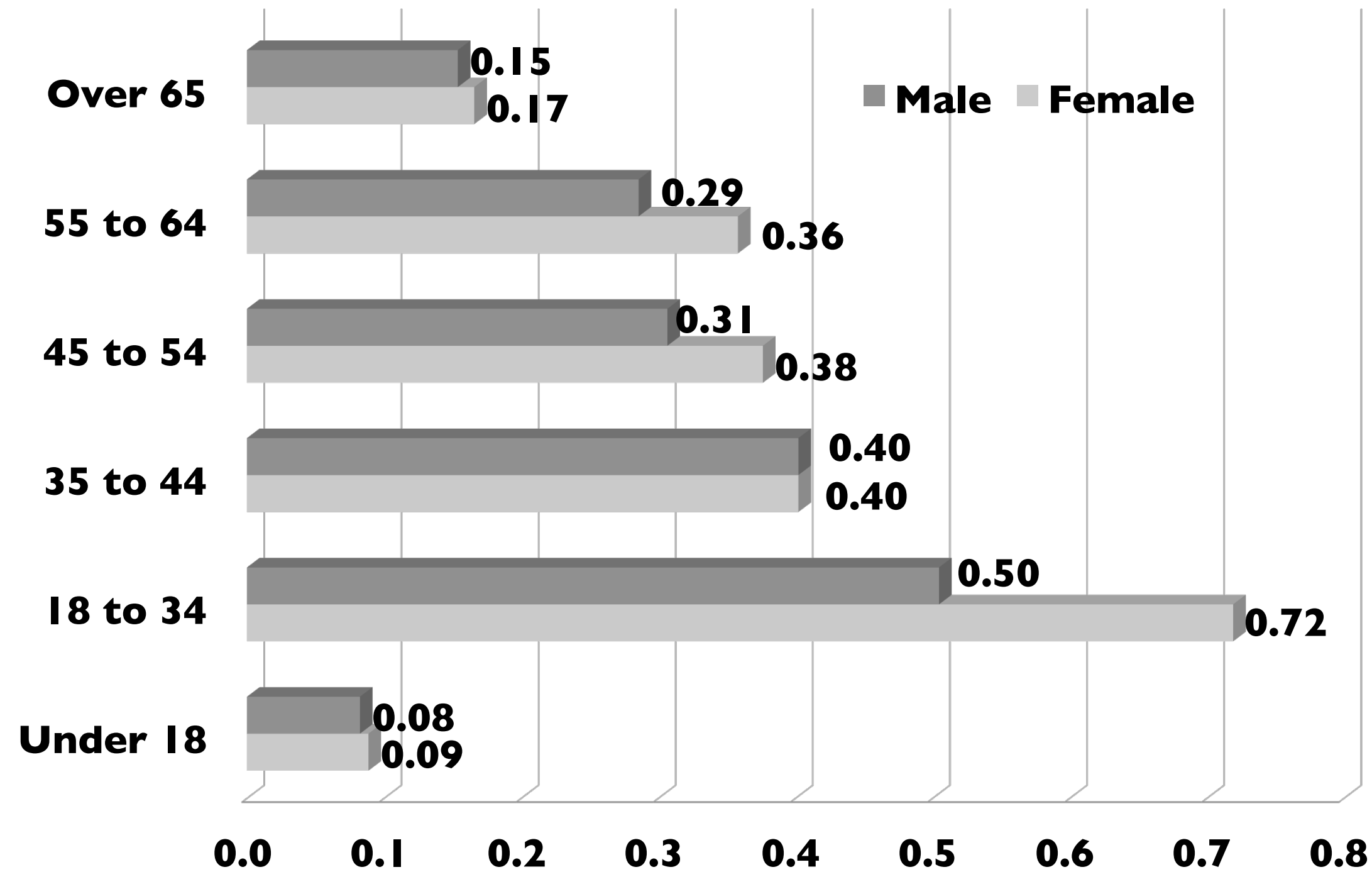
Question: Approximately how much will you spend in the Napa Valley PER DAY on the following?



# Travel Party Size

The average Napa Valley travel party in 2014 consisted of 3.8 persons.

Chart 19: Travel Party Size  
(All Visitors)



Base: All respondents. 1,807 completed surveys

Detail by Type of Visitor

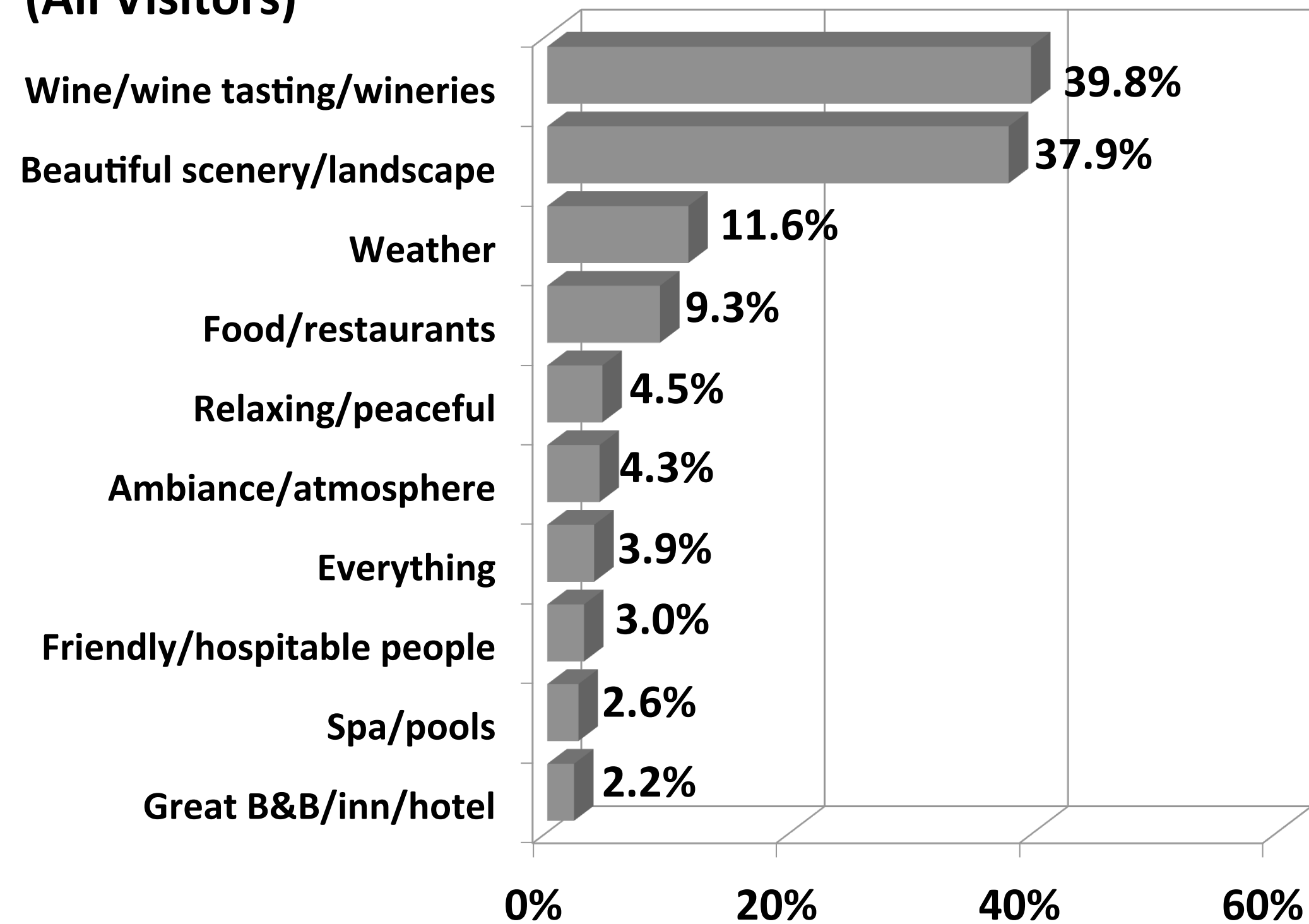
	Lodging Guests	VFR	Day-trip
Males over 65	0.20	0.12	0.14
Males 55 to 64	0.29	0.29	0.28
Males 45 to 54	0.24	0.40	0.33
Males 35 to 44	0.15	0.44	0.51
Males 18 to 34	0.14	0.37	0.67
Males under 18	0.05	0.10	0.09
Females over 65	0.21	0.25	0.14
Females 55 to 64	0.43	0.34	0.33
Females 45 to 54	0.31	0.51	0.39
Females 35 to 44	0.22	0.50	0.47
Females 18 to 34	0.27	0.63	0.92
Females under 18	0.05	0.05	0.11
<b>Base</b>	<b>514</b>	<b>90</b>	<b>1,203</b>

Question: Please tell us how many people (including yourself) of each age group and gender are in your immediate travel party.

# Most Liked Aspects of Napa Valley

Napa Valley's wine (39.8%) and scenic beauty (37.9%) were the area's most liked aspects during 2014.

Chart 22: Most Liked Aspects of Napa Valley (All Visitors)



Base: All respondents. 1,848 completed surveys

Detail by Type of Visitor

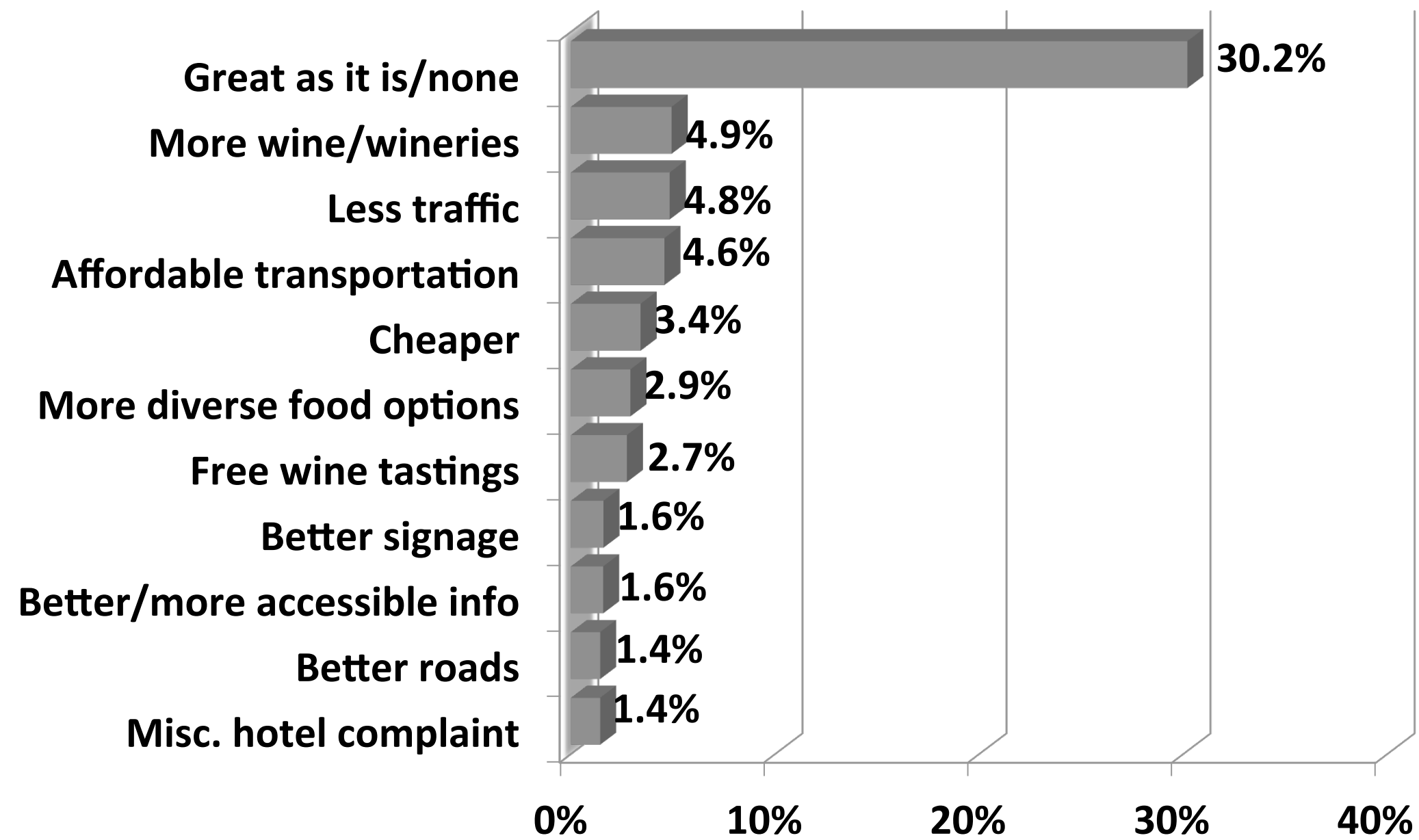
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine/wine tasting/wineries	39.8%	32.9%	39.1%	42.8%
Beautiful scenery/landscape	37.9%	20.3%	32.5%	45.9%
Weather	11.6%	9.3%	23.2%	11.7%
Food/restaurants	9.3%	16.6%	7.9%	6.2%
Relaxing/peaceful	4.5%	8.3%	2.6%	3.0%
Ambiance/atmosphere	4.3%	3.3%	4.0%	4.7%
Everything	3.9%	5.4%	4.0%	3.2%
Friendly/hospitable people	3.0%	4.8%	6.6%	2.0%
Spa/pools	2.6%	8.3%	0.0%	0.3%
Great B&B/inn/hotel	2.2%	7.3%	0.7%	0.1%
<b>Base</b>	<b>1,086</b>	<b>286</b>	<b>41</b>	<b>759</b>

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

# Enhancing the Napa Valley Experience

Napa Valley visitors feel that Napa Valley is great as it is (30.2%).

Chart 23: Enhancing the Napa Valley experience (All Visitors)



Base: All respondents. 1,848 completed surveys

Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Great as it is/none	30.2%	16.6%	45.0%	34.9%
More wine/wineries	4.9%	6.7%	6.0%	4.1%
Less traffic	4.8%	1.4%	6.6%	6.2%
Affordable transportation	4.6%	3.4%	7.3%	4.9%
Cheaper	3.4%	1.3%	6.6%	4.1%
More diverse food options	2.9%	3.1%	2.0%	2.9%
Free wine tastings	2.7%	3.0%	2.6%	2.6%
Better signage	1.6%	0.9%	0.7%	2.0%
Better/more accessible info	1.6%	1.6%	1.3%	1.6%
Better roads	1.4%	1.3%	2.0%	1.4%
Misc. hotel complaint	1.4%	3.3%	0.7%	0.7%
<b>Base</b>	<b>1,848</b>	<b>528</b>	<b>92</b>	<b>1228</b>

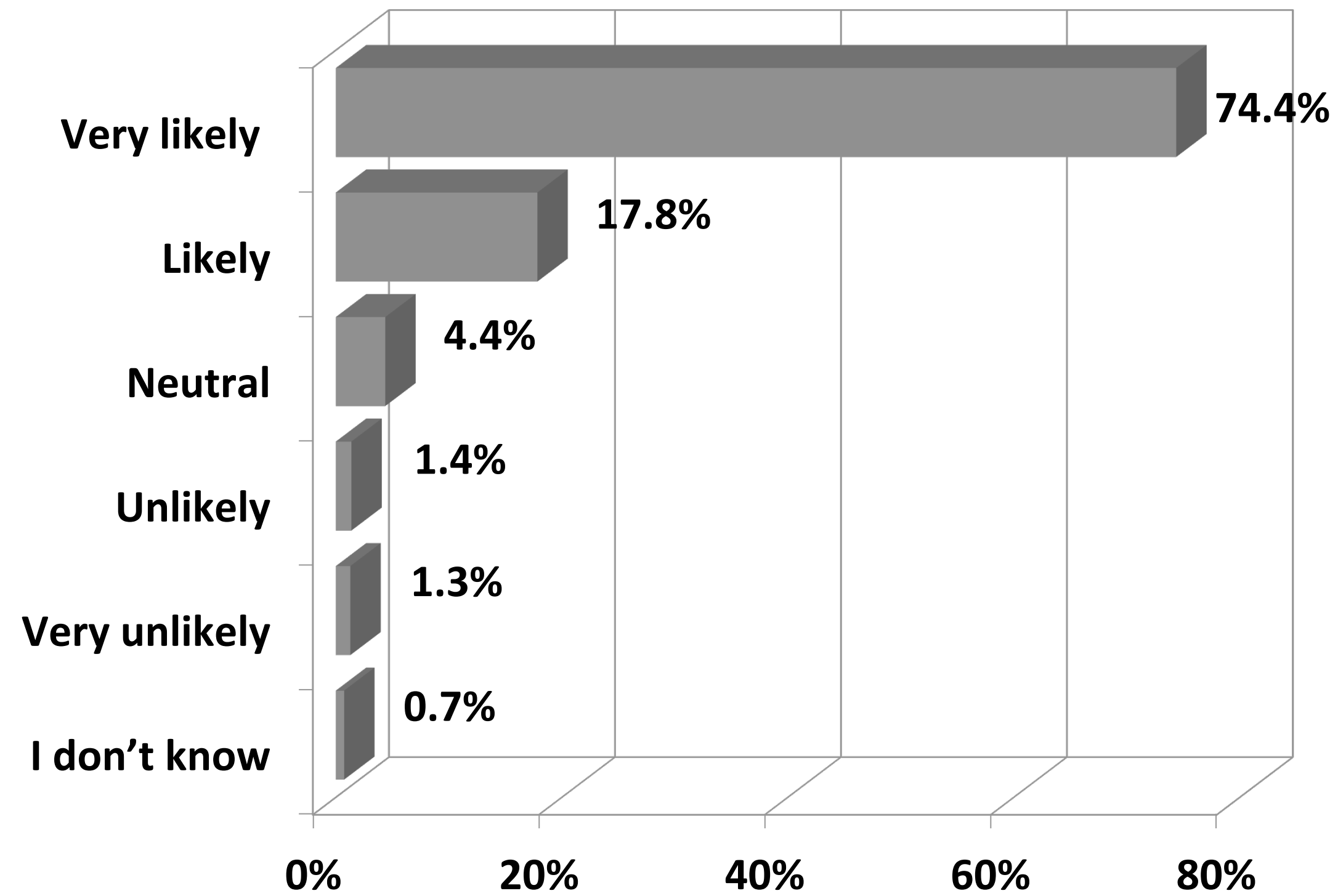
Question: In your opinion, what attractions or services would most enhance the Napa Valley?



# Likelihood to Return to Napa Valley

Nearly all Napa Valley visitors said that they are either “likely” (17.8%) or “very likely” (74.4%) to return to the Napa Valley.

Chart 24: Likelihood to Return to Napa Valley  
(All Visitors)



Base: All respondents. 1,816 completed surveys

Detail by Type of Visitor

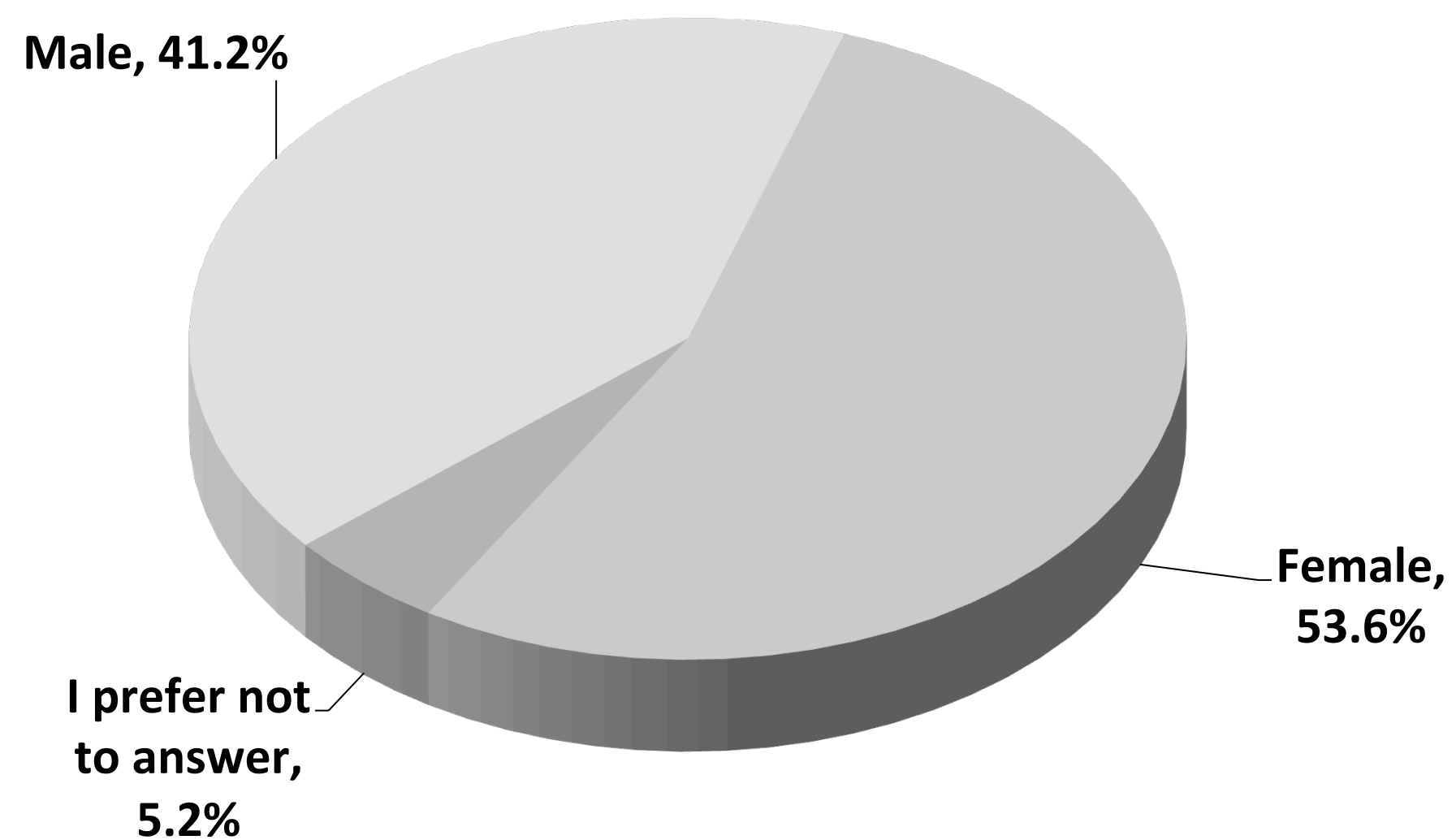
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Very likely	74.4%	83.4%	75.2%	70.5%
Likely	17.8%	12.4%	17.4%	20.2%
Neutral	4.4%	2.2%	4.0%	5.3%
Unlikely	1.4%	0.7%	0.7%	1.7%
Very unlikely	1.3%	0.2%	1.3%	1.7%
I don't know	0.7%	1.1%	1.3%	0.5%
<b>Base</b>	<b>1,816</b>	<b>517</b>	<b>91</b>	<b>1208</b>

Question: How likely are you to return to the Napa Valley?

# Gender

Napa Valley visitors skew slightly female (53.6%).

Chart 25: Gender (All Visitors)



Base: All respondents. 1,738 completed surveys

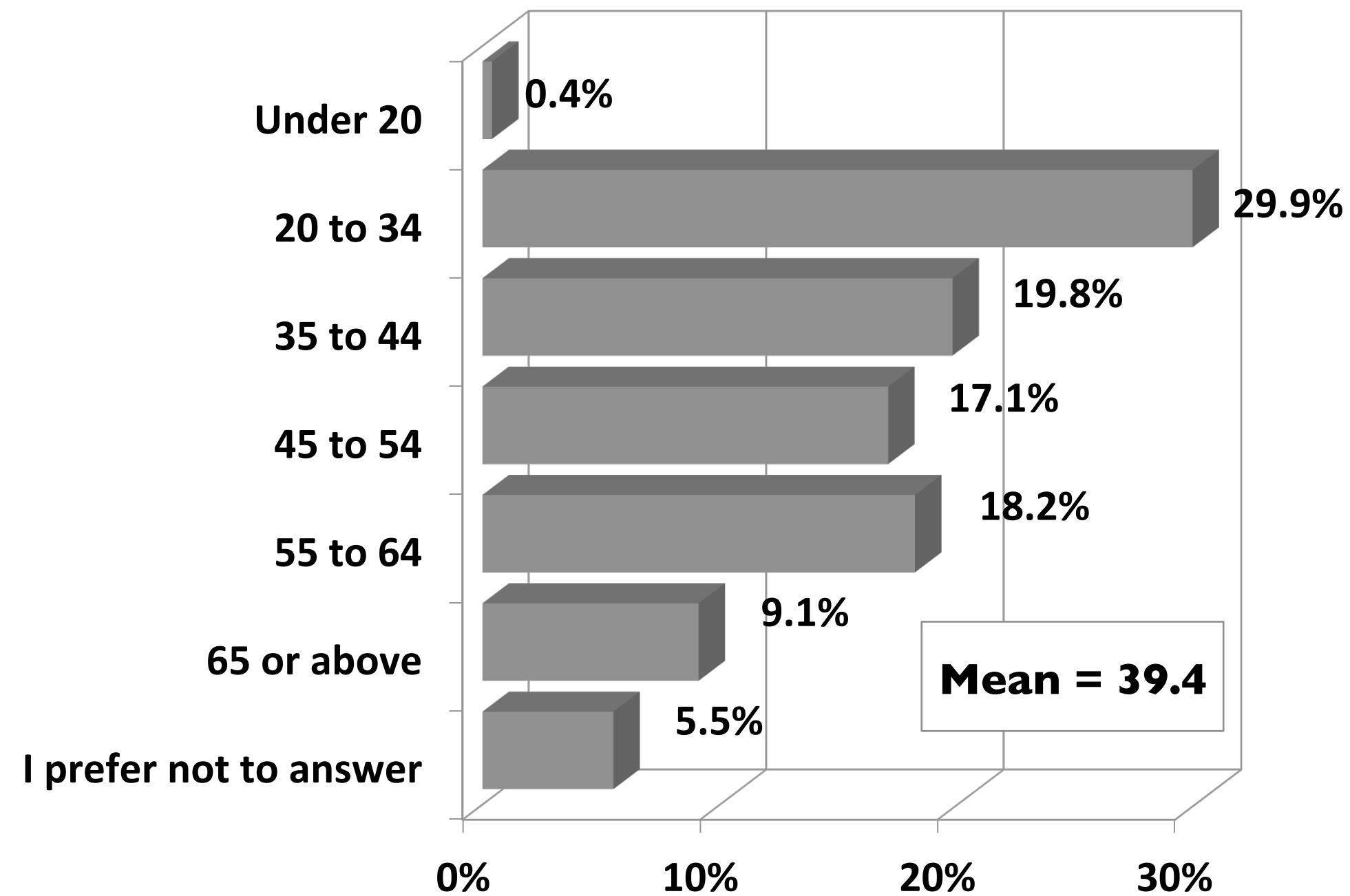
Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>Female</b>	53.6%	63.6%	49.6%	49.4%
<b>Male</b>	41.2%	35.0%	40.1%	44.1%
<b>I prefer not to answer</b>	5.2%	1.4%	10.2%	6.5%
<b>Base</b>	<b>1,738</b>	<b>519</b>	<b>84</b>	<b>1136</b>

Question: What is your gender?

The average Napa Valley visitor in 2014 was 39.4 years of age.

Chart 27: Age



Base: All respondents. 1,751 completed surveys

Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Under 20	0.4%	0.4%	0.0%	0.4%
20 to 34	29.9%	13.8%	24.6%	37.6%
35 to 44	19.8%	14.8%	23.2%	21.8%
45 to 54	17.1%	22.3%	16.7%	14.8%
55 to 64	18.2%	29.9%	18.1%	12.9%
65 or above	9.1%	17.2%	8.7%	5.5%
I prefer not to answer	5.5%	1.6%	8.7%	7.0%
<b>Mean</b>	<b>39.4</b>	<b>47.4</b>	<b>39.3</b>	<b>35.5</b>
<b>Base</b>	<b>1,751</b>	<b>519</b>	<b>84</b>	<b>1,149</b>

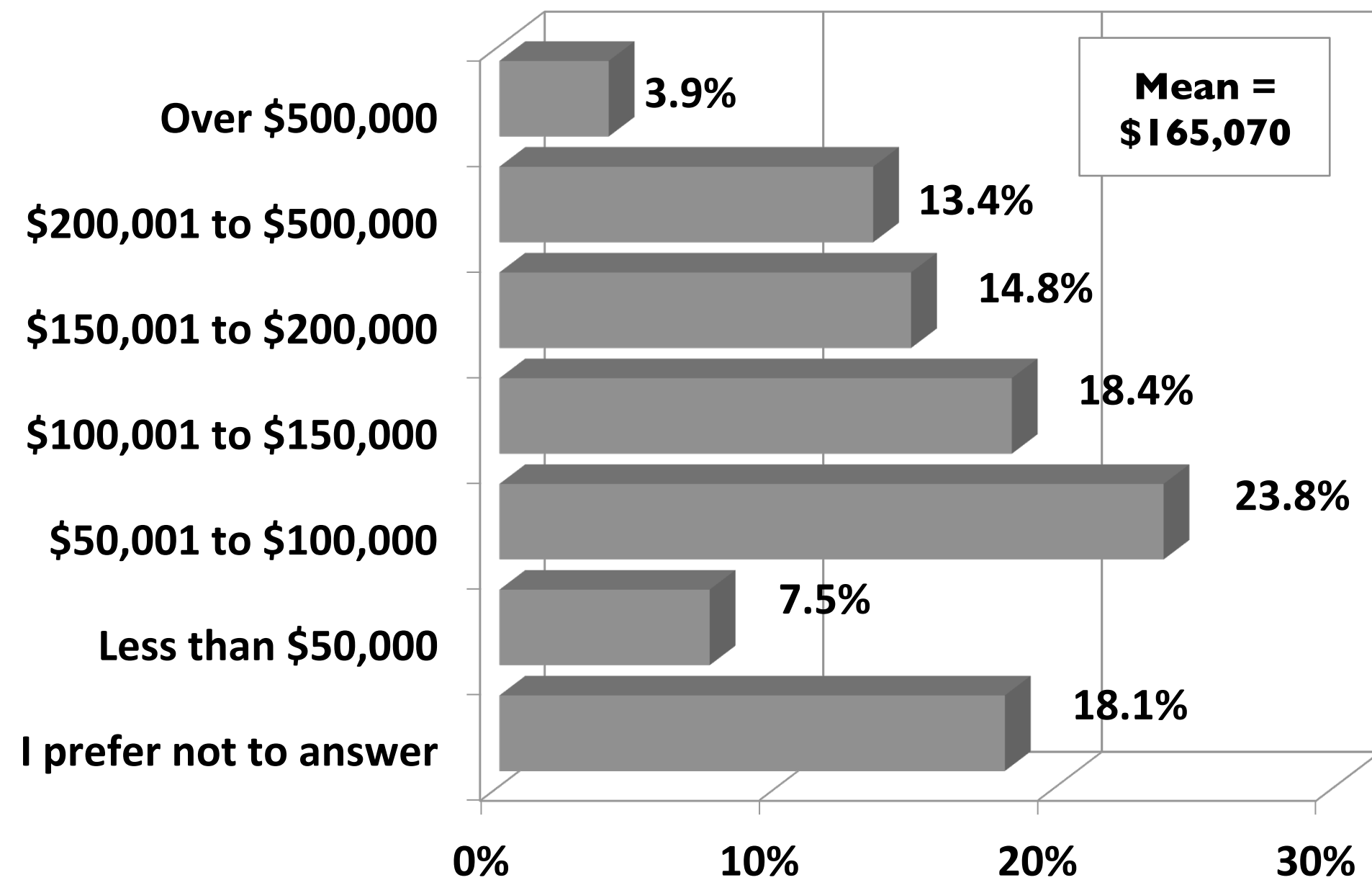
Question: Which age category best represents your age?



# Annual Household Income

Napa Valley visitors are an affluent group.

Chart 28: Income  
(All Visitors)



Base: All respondents. 1,740 completed surveys

Detail by Type of Visitor

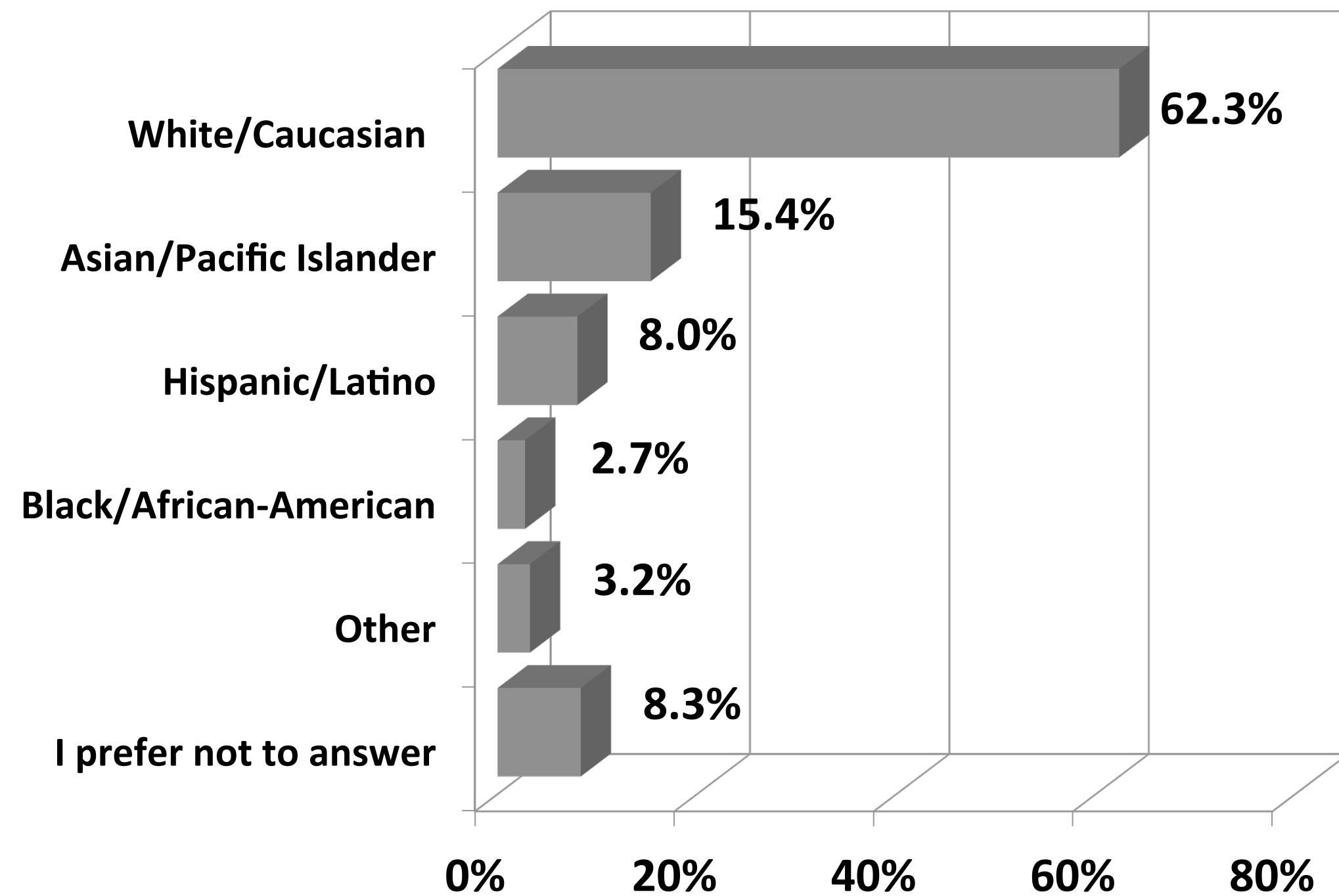
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Over \$500,000	3.9%	5.9%	0.7%	3.2%
\$200,001 to \$500,000	13.4%	19.8%	11.0%	10.7%
\$150,001 to \$200,000	14.8%	17.0%	11.8%	14.0%
\$100,001 to \$150,000	18.4%	18.0%	25.0%	18.1%
\$50,001 to \$100,000	23.8%	16.2%	29.4%	26.8%
Less than \$50,000	7.5%	3.8%	5.9%	9.3%
I prefer not to answer	18.1%	19.2%	16.2%	17.8%
<b>Mean</b>	<b>\$165,070</b>	<b>\$203,261</b>	<b>\$140,351</b>	<b>\$150,043</b>
<b>Base</b>	<b>1,740</b>	<b>514</b>	<b>83</b>	<b>1,144</b>

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

# Ethnicity

Nearly two out of three Napa Valley visitors identify as Caucasian.

Chart 28: Ethnicity  
(All Visitors)



Base: All respondents. 1,747 completed surveys

Detail by Type of Visitor

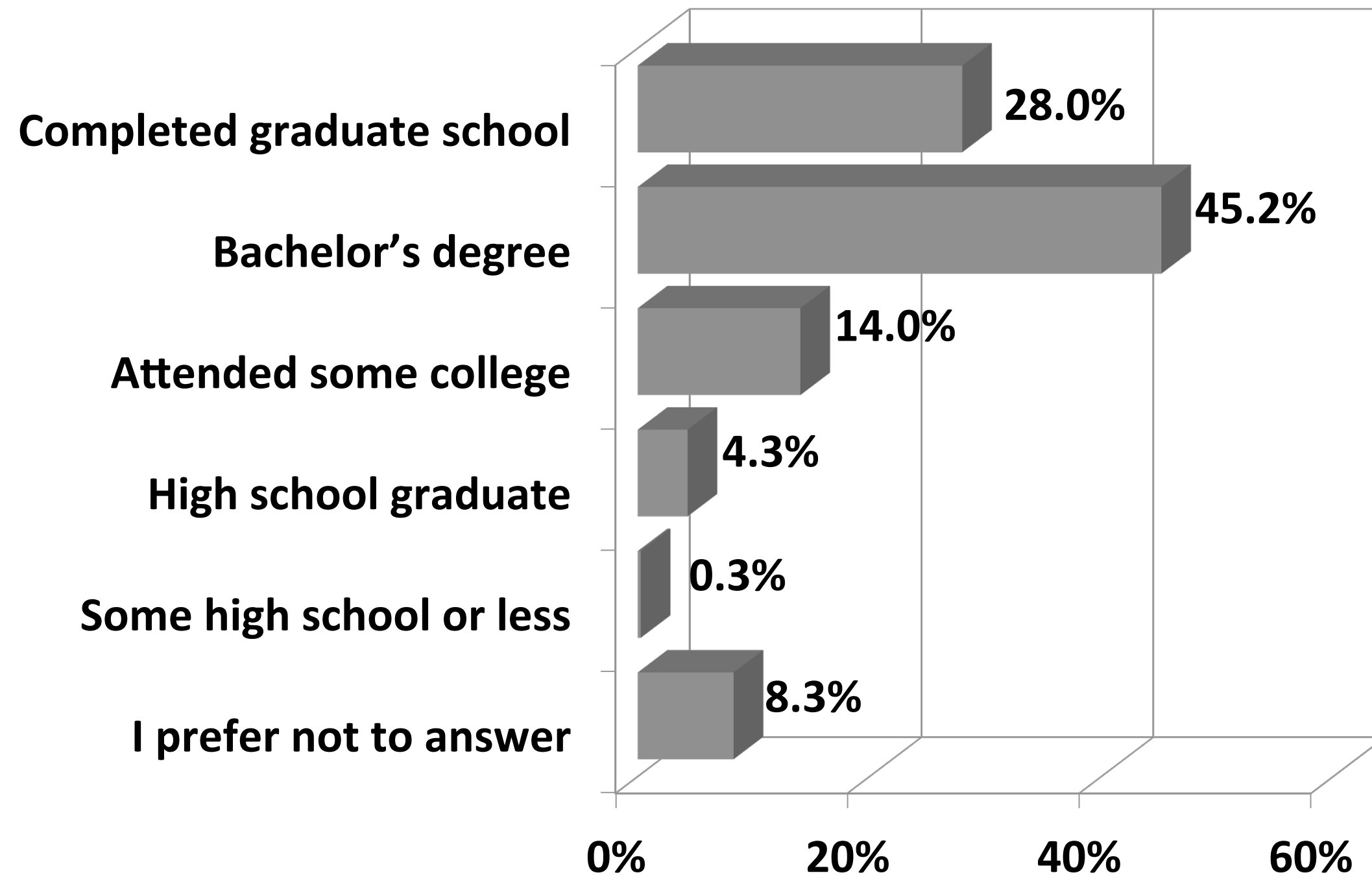
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
White/Caucasian	62.3%	79.0%	74.5%	54.0%
Asian/Pacific Islander	15.4%	7.2%	5.8%	19.7%
Hispanic/Latino	8.0%	4.6%	7.3%	9.6%
Black/African-American	2.7%	1.8%	2.2%	3.2%
Other	3.2%	1.3%	1.5%	4.2%
I prefer not to answer	8.3%	6.1%	8.8%	9.3%
<b>Base</b>	<b>1,747</b>	<b>515</b>	<b>84</b>	<b>1,149</b>

Question: Which best describes your race or ethnic background?

# Education

Napa Valley visitors are highly educated.

Chart 29: Education  
(All Visitors)



Base: All respondents. 1,747 completed surveys

Detail by Type of Visitor

	Total	Lodging Guest	VFR	Day-trip
Completed graduate school	28.0%	36.2%	24.1%	24.5%
Bachelor's degree	45.2%	41.1%	47.4%	46.8%
Attended some college	14.0%	16.1%	11.7%	13.3%
High school graduate	4.3%	2.6%	5.8%	4.9%
Some high school or less	0.3%	0.0%	1.5%	0.3%
I prefer not to answer	8.3%	3.9%	9.5%	10.2%
<b>Base</b>	<b>1,747</b>	<b>518</b>	<b>84</b>	<b>1,145</b>

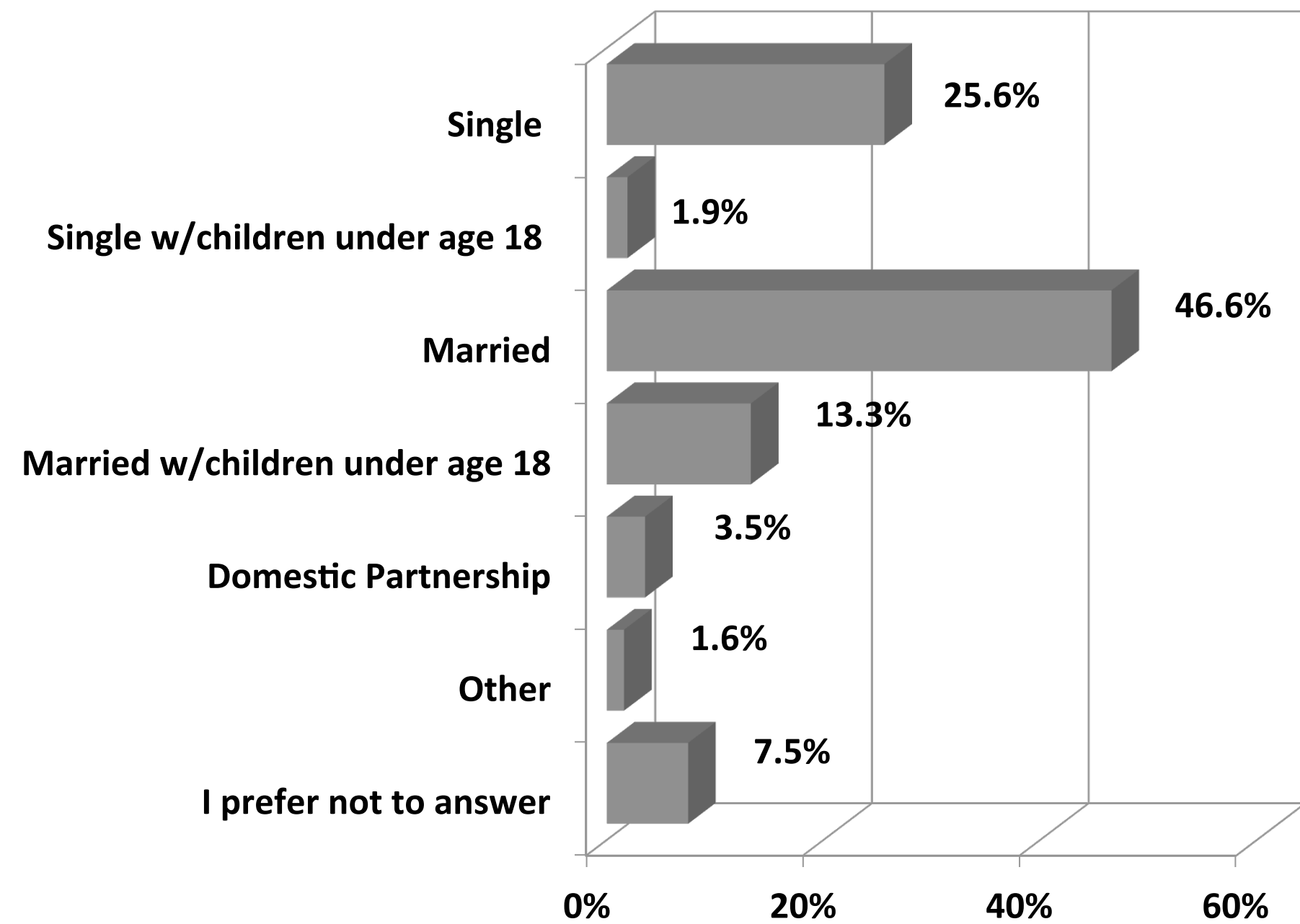
Question: Which of the following best represents the highest level of formal education you have completed?



# Marital Status

The majority of Napa Valley visitors are either married (58.9%) or in a domestic partnership (3.7%).

Chart 30: Marital Status  
(All Visitors)



Base: All respondents. 1,747 completed surveys

Detail by Type of Visitor

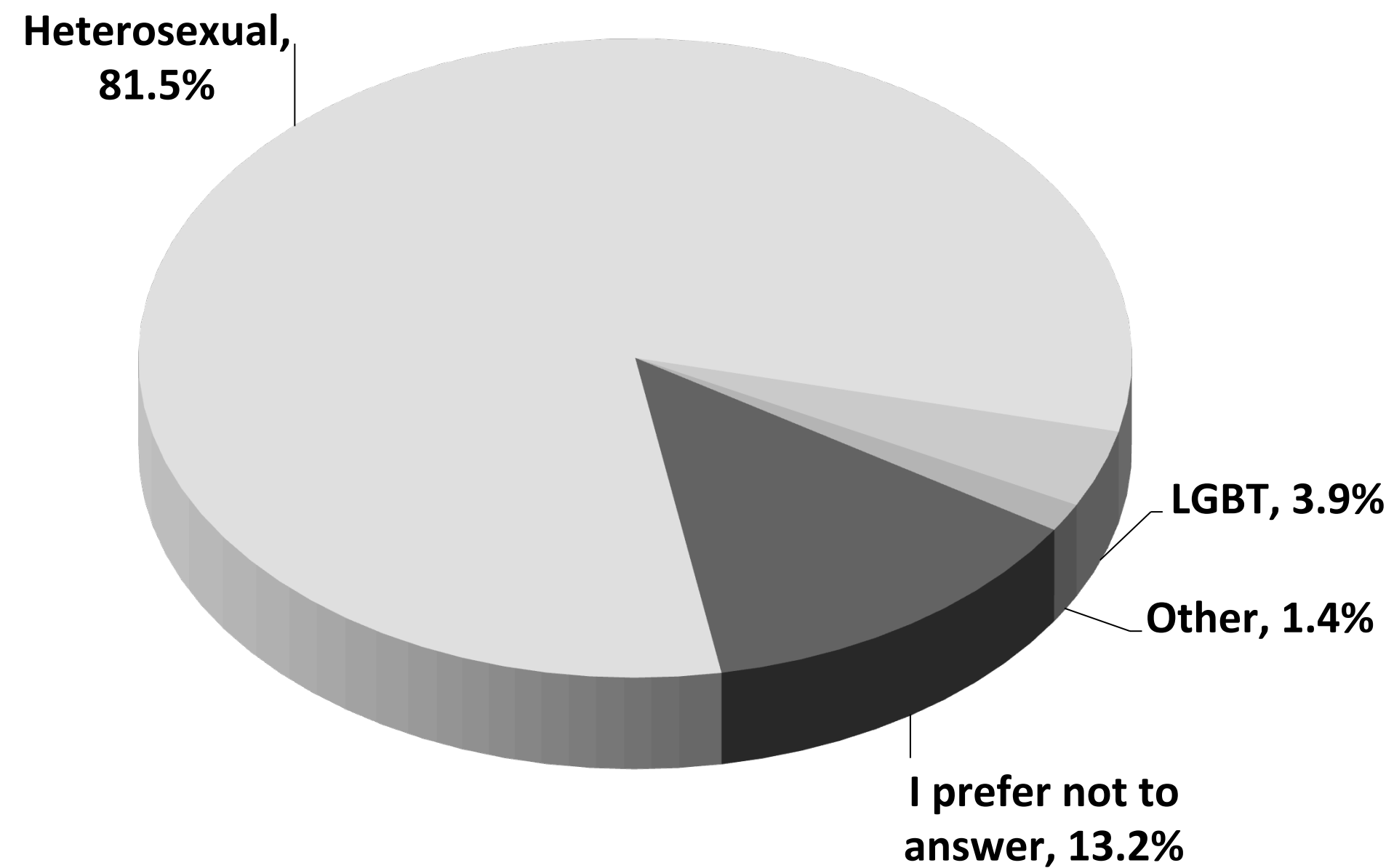
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Single	25.6%	13.8%	27.9%	30.8%
Single w/children under age 18	1.9%	0.8%	2.2%	2.4%
Married	46.6%	65.7%	43.4%	38.1%
Married w/children under age 18	13.3%	9.8%	14.0%	14.8%
Domestic Partnership	3.5%	4.9%	0.7%	3.1%
Other	1.6%	1.7%	2.9%	1.4%
I prefer not to answer	7.5%	3.3%	8.8%	9.3%
<b>Base</b>	<b>1,745</b>	<b>518</b>	<b>83</b>	<b>1,144</b>

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

# Orientation

3.9 percent of Napa Valley visitors identify as LGBT.

Chart 31: Orientation  
(All Visitors)



Base: All respondents. 1,732 completed surveys

Detail by Type of Visitor

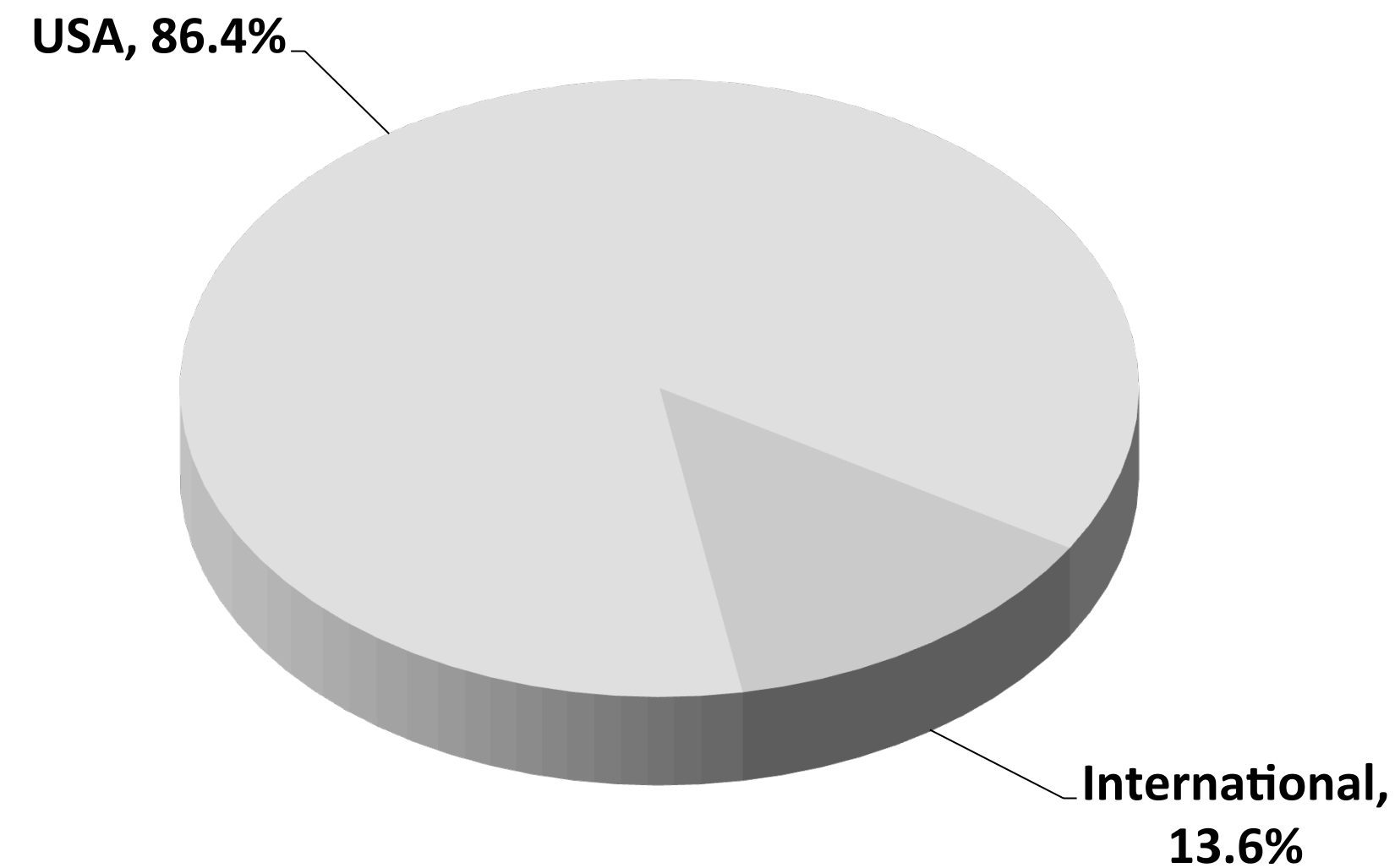
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>Heterosexual</b>	81.5%	87.8%	81.6%	78.7%
<b>LGBT</b>	3.9%	3.1%	2.2%	4.4%
<b>Other</b>	1.4%	1.0%	2.2%	1.6%
<b>I prefer not to answer</b>	13.2%	8.0%	14.0%	15.4%
<b>Base</b>	<b>1,732</b>	<b>505</b>	<b>83</b>	<b>1,144</b>

Question: Which best describes you?

# Point of Origin: Country

**Napa Valley visitors are primarily of domestic origin (86.4%).** 13.6 percent of visitors are international residents.

**Chart 32: Country  
(All Visitors)**



Base: All respondents. 1,743 completed surveys

**Detail by Type of Visitor**

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>USA</b>	86.4%	91.9%	81.5%	84.9%
<b>International</b>	13.6%	8.1%	18.5%	15.1%
<b>Base</b>	<b>1,743</b>	<b>433</b>	<b>92</b>	<b>1,218</b>

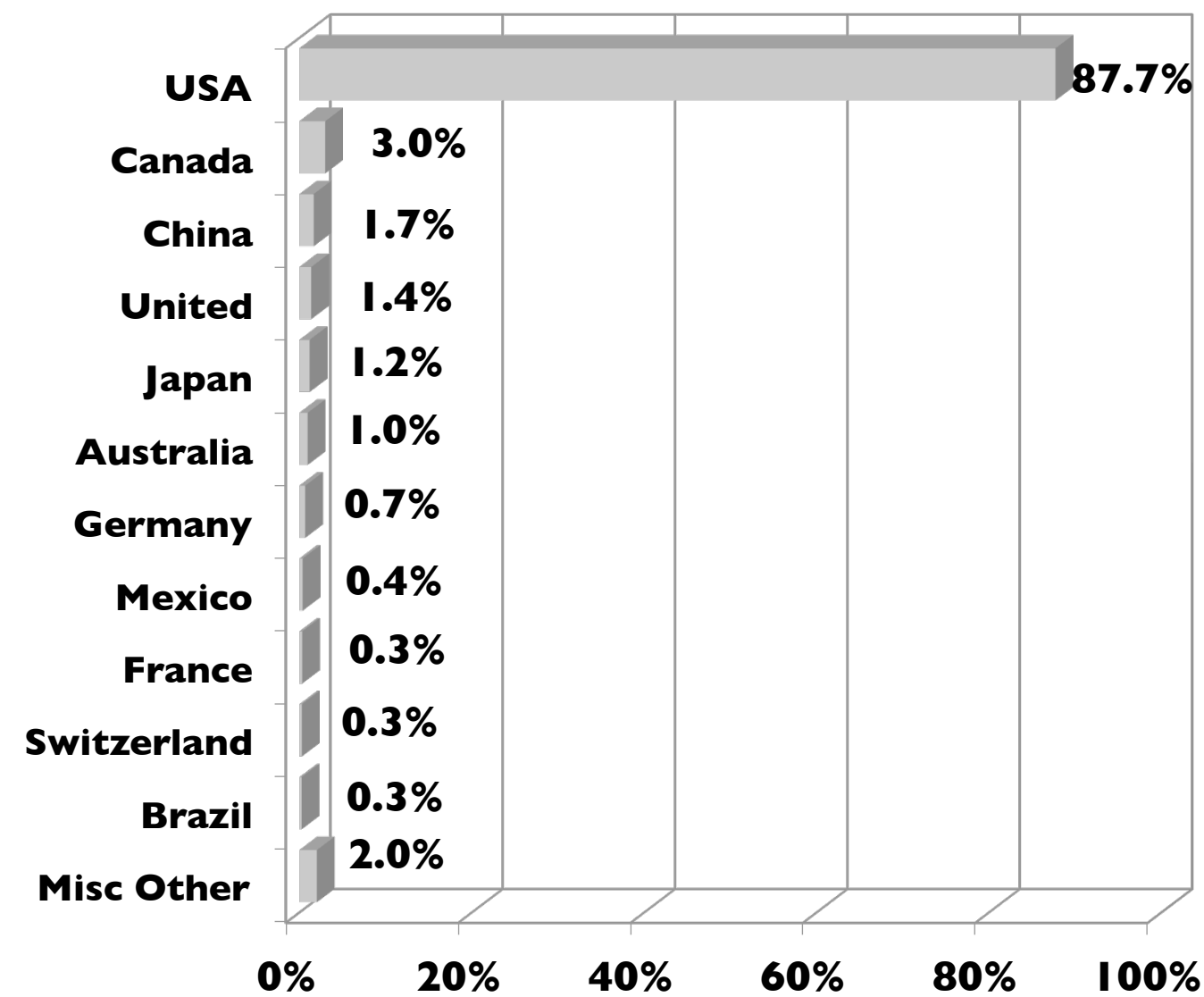
Question: What is your country of residence?



# International Country of Origin

Napa Valley visitors come from around the world.

**Chart 33: Country of Origin  
(All Visitors – Domestic and International)**



Base: All respondents. 1,814 completed surveys

**Detail by Type of Visitor**

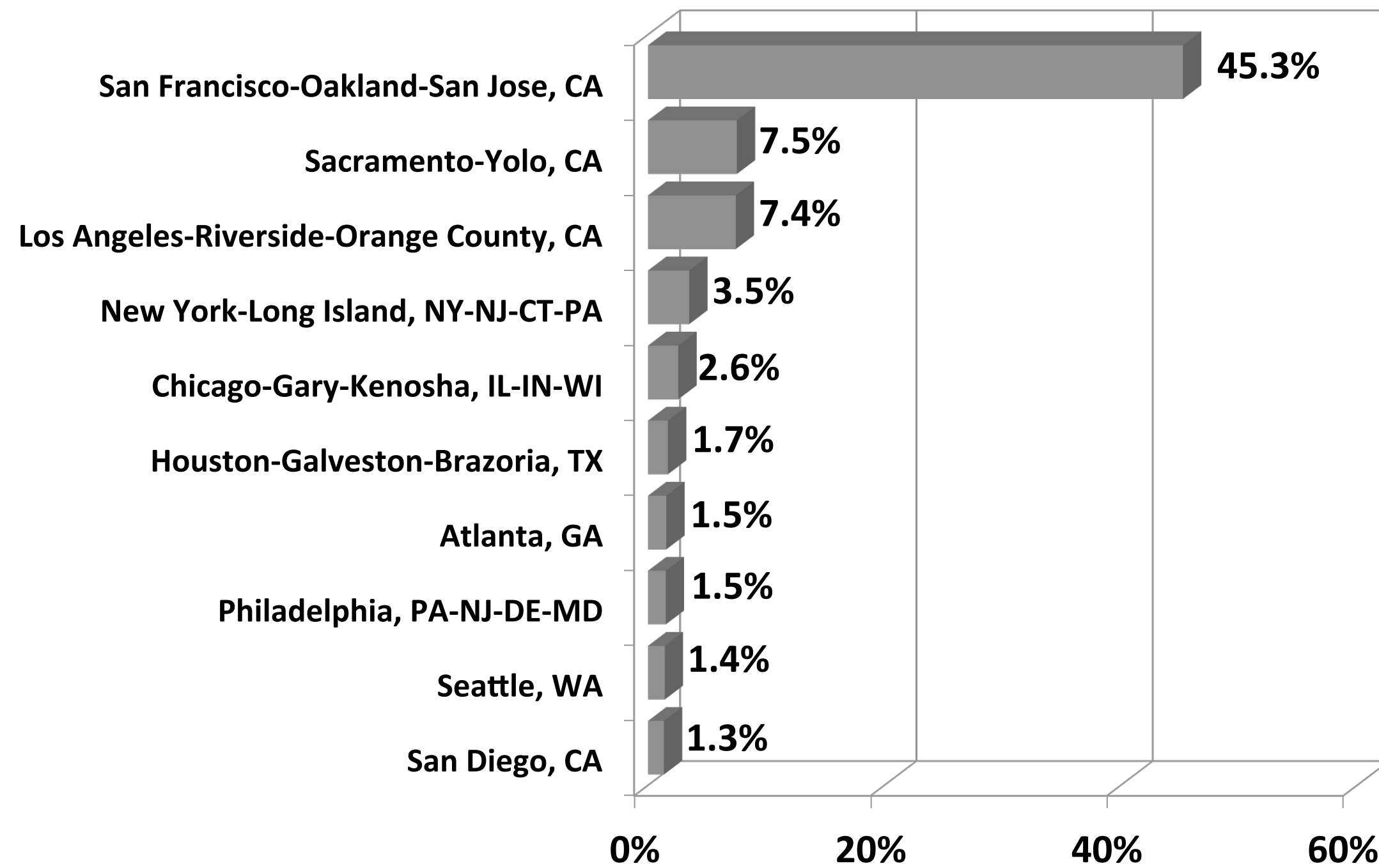
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
USA	87.7%	94.6%	81.5%	85.3%
Canada	3.0%	1.4%	9.3%	3.2%
China	1.7%	0.6%	0.0%	2.3%
United Kingdom	1.4%	0.6%	3.3%	1.6%
Japan	1.2%	0.3%	0.7%	1.6%
Australia	1.0%	1.3%	1.3%	0.8%
Germany	0.7%	0.6%	0.0%	0.8%
Mexico	0.4%	0.0%	0.7%	0.5%
France	0.3%	0.1%	0.7%	0.4%
Switzerland	0.3%	0.1%	0.0%	0.4%
Brazil	0.3%	0.0%	0.0%	0.4%
<b>Base</b>	<b>1,814</b>	<b>510</b>	<b>92</b>	<b>1,212</b>

Question: Country of origin

# Point of Origin: MSA

Napa Valley's top domestic feeder market is the San Francisco-Oakland-San Jose MSA (45.3%).

Chart 34: MSA  
(All Domestic Visitors)



Base: All respondents. 1,106 completed surveys

Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
San Francisco-Oakland-San Jose, CA	45.3%	35.3%	23.0%	51.0%
Sacramento-Yolo, CA	7.5%	7.1%	4.0%	8.0%
Los Angeles-Riverside-Orange County, CA	7.4%	9.8%	8.0%	6.5%
New York-Long Island, NY-NJ-CT-PA	3.5%	4.0%	4.0%	3.2%
Chicago-Gary-Kenosha, IL-IN-WI	2.6%	3.5%	6.0%	1.9%
Houston-Galveston-Brazoria, TX	1.7%	1.9%	0.0%	1.7%
Atlanta, GA	1.5%	0.4%	5.0%	1.7%
Philadelphia, PA-NJ-DE-MD	1.5%	1.9%	2.0%	1.3%
Seattle, WA	1.4%	1.5%	5.0%	1.1%
San Diego, CA	1.3%	1.5%	1.0%	1.3%
<b>Base</b>	<b>1,086</b>	<b>286</b>	<b>41</b>	<b>759</b>

Question: What is your home zip/postal code?