



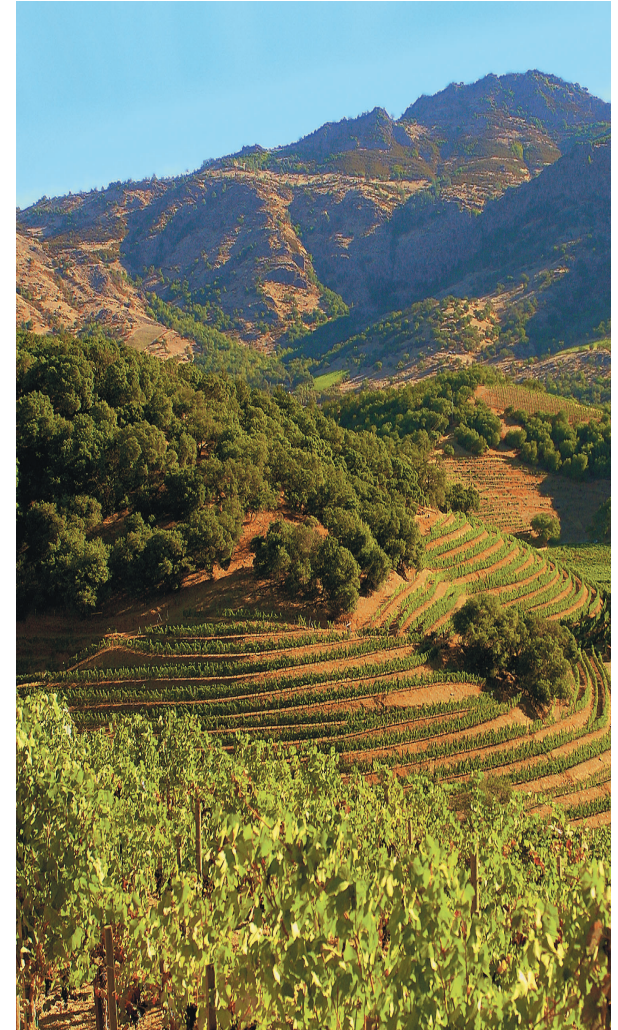
**Visit Napa Valley**  
**2014 Napa Valley Visitor Profile**  
Report of Findings  
March 2015

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.



# Research Overview

- 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 weighted survey sample sizes for each visitor segment are also shown in these data tables.

# Lodging Guest Survey

During 2014, 31 Napa Valley lodging properties participated in the visitor profile study by distributing a brief self-administered survey to all departing guests for a minimum of two weeks each quarter. These surveys were completed by lodging guests and returned via pre-paid mail to Destination Analysts. In total, 939 fully completed surveys were collected. The following lodging properties participated in this research:

- 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

Throughout 2014, Destination Analysts staff used a questionnaire identical to the Napa Valley Lodging Guest Survey to interview a random sample of visitors at locations around Napa Valley. This survey only collected data only from two types of visitors: 1) Day trip visitors and 2) Visiting friends or relatives staying overnight in private Napa County homes (VFRs). A total of 1,051 Napa Valley visitors were interviewed in this effort. The following locations participated in this research:

- 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



# Report Format

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

The data presented for all visitors in this report is weighted based on actual Napa County visitor volume.

This report additionally presents results for each of the three visitor segments:

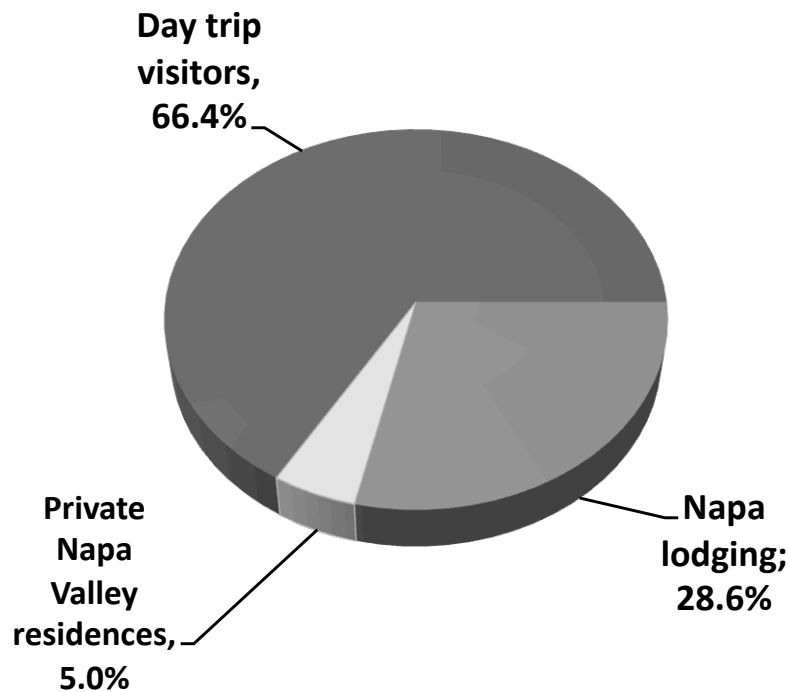
- 1) Lodging guests
- 2) Visiting friends and relatives (VFRs)
- 3) Day trip visitors.

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

# Visitor Volume, 2014

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

Visitor Volume, 2014



## Visitors to Napa (thousands)

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



# **Executive Summary of Key Findings**





# Key Findings

- **Visitor Volume.** Research conducted for this project suggests that Napa Valley hosted 3.3 million visitors in 2014. The largest segment of visitors, day-trip visitors, represents 2.2 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 951,000 visitors in 2014, or approximately 29 percent of all visitors. The smallest segment of visitors consisted of visiting friends and relatives, or VFR visitors, accounting for about 166,000 persons (5.0% of overall visitor volume).
- **In 2014 Napa Valley's visitors primarily came to the area for leisure purposes.** Over two-thirds of visitors reported visiting for a weekend getaway (38.8%) or vacation (34.2%). About one in ten each visited for other personal reasons (9.7%) or to attend a wedding or special event (9.0%).
- **The Napa Valley draws a substantial amount of repeat visitation.** The average Napa Valley visitor in 2014 made 2.3 trips to Napa Valley in the past twelve months. This primarily consists of 2.0 leisure trips, followed by 0.2 business trips and 0.1 conference or other group meeting trips.

# Key Findings

- **San Francisco International Airport was, by far, the most commonly used airport by Napa Valley visitors (69.5%).** Napa Valley visitors who arrived in the area via airplane were asked which airport they used. Visitors also flew into Oakland International Airport (12.5%), followed by Sacramento International Airport (6.4%).
- **Nearly all Napa Valley visitors traveled within the area via automobile (94.1%).** These visitors use either a personal car (58.6%) or rental car (35.5%). 10.9 percent reported walking while in the Napa Valley. A bike, limo, bus, hotel shuttle or taxi was used by approximately 15 percent of visitors.
- **Visitors to the Napa Valley tend to visit multiple towns within the area.** The City of Napa (67.0%) and St. Helena (59.6%) were the Napa Valley towns with the highest visitor traffic during 2014. Nearly half of Napa Valley visitors surveyed visited Calistoga (46.3%) and Yountville (44.1%).
- **Napa Valley visitors engage in a myriad of activities during their trip.** Visiting wine tasting rooms (82.3%) and dining in restaurants (69.4%) were the most popular activities among Napa Valley visitors. Visitors also went on winery tours (52.6%) and shopped in the Napa Valley (40.3%).

# Key Findings

- **Napa Valley visitors frequent multiple wineries during their visit.** Over half of Napa Valley visitors went to three or more wineries or tasting rooms during their visit (56.7%). On average, visitors went to 3.3 wineries in 2014.
- **While the majority of Napa Valley visitors did not make advance appointments to visit wineries, nearly one in three indeed made reservations prior to visiting any Napa Valley wineries (30.7%).**
- **The majority of Napa Valley visitors feel neutrally about appointments at wineries.** 39.5 percent of Napa Valley visitors felt neutrally or did not care about wineries requiring advance appointments for wine tasting. One quarter of visitors surveyed “Like it” or “Like it very much” (27.8%), while 32.6 percent reported dislike.
- **Likelihood to join a wine club is low among intercept respondents.** Day trip and VFR visitors were asked their likelihood of joining a wine club during their trip. 22.2 percent of these Napa Valley visitors in 2014 were “likely” (10.9%) or “very likely” (11.2%) to join a wine club.

# Key Findings

- **Nearly one in three lodging guests joined a wine club (29.7%).**
- **The majority of intercept respondents reported high likelihood to purchase and take home wine.** Day trip and VFR visitors were asked their likelihood of purchasing wine to take home. Two-thirds of these visitors were “Likely” (25.6%) or “Very likely” (42.6%) to buy wine to take home.
- **Two-thirds of lodging guests surveyed bought wine to take home (66.5%).**
- **In 2014, Napa Valley visitors spent an average of \$482.71 per day in-market.** The bulk of this spending is attributed to wine bottles purchased at wineries (\$130.64), followed by Restaurants (\$124.97). Reported visitor spending usually covers more than one visitor. The average daily spending reported in the previous question covered an average of 2.2 persons.
- **Napa Valley lodging guests commonly travel with one other person.** Lodging guests were asked how many people stayed in their lodging room. Over three-fourths of lodging guests shared their room with one other person (77.8%). The average lodging room accommodated 2.2 persons.

# Key Findings

- **In 2014, the average Napa Valley visitor spent 1.9 days in the area during their trip.** Visitors staying in a private home in the area had the longest length of stay, with a reported average of 3.1 days. Those staying in commercial lodging spent 2.9 days in Napa Valley on average.
- **The average Napa Valley travel party in 2014 consisted of 3.8 persons.** This was comprised of 1.7 males and 2.1 females. 9.4 percent of visitors surveyed traveled with children under 18.
- **Prior to arriving in Napa Valley, Napa Valley visitors most commonly use the Official Napa Valley destination website, VisitNapaValley.com, to help plan their trip (25.0%).** 12.0 percent used a free winery map or guide, followed by one in ten who used free travel guide books or brochures (10.8%) and 6.7 percent who used the Official Napa Valley Visitors Guide.
- **Once in-market, free winery maps (31.2%) and free travel guide books (23.8%) were the most popular travel planning resources used by Napa Valley visitors.** 10.7 percent used the Official Napa Valley visitors guide.

# Key Findings

- **Napa Valley's wine (39.8%) and scenic beauty (37.9%) were the area's most liked aspects during 2014.** Approximately one in ten reported the area's weather (11.6%) and restaurants (9.3%) as aspects they liked best about Napa Valley.
- **Napa Valley visitors feel that Napa Valley is great as it is (30.2%).** In open ended question that asked visitors what could enhance the Napa Valley, one in three stated that the destination does not need any improvements. Of the actual suggestions provided, about five percent of respondents reported that "more wineries" (4.9%), "less traffic" (4.8%) and "affordable transportation" (4.6%) would enhance the 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.**
- **Napa Valley visitors skew slightly female (53.6%).**

# Key Findings

- **The average Napa Valley visitor in 2014 was 39.4 years of age.** Over 60 percent of survey respondents were 35 years of age or older (64.2%).
- **Napa Valley visitors are an affluent group.** 50.5 percent reported an annual household income of \$100,000 or more. The average annual Napa Valley visitor's household income was \$165,070.
- **Nearly two out of three Napa Valley visitors identify as Caucasian.** The next largest group is Asian, Pacific Islander (15.%), followed by Hispanic/Latino (8.0%).
- **Napa Valley visitors are highly educated.** 73.2 percent have at least a bachelor's degree, including 28.0 percent have completed graduated school.
- **The majority of Napa Valley visitors is either married (58.9%) or in a domestic partnership (3.7%).** 28.0 percent is single, and 15.8 percent have children under 18.

# Key Findings

- **3.9 percent of Napa Valley visitors identifies as LGBT.**
- **Napa Valley visitors are primarily of domestic origin (86.4%).** 13.6 percent of visitors are international residents.
- **Napa Valley's top domestic feeder market is the San Francisco-Oakland-San Jose MSA (45.3%).** Other top feeder markets include the Sacramento-Yolo MSA (7.5%) and the Los Angeles-Riverside-Orange County MSA (7.4%).





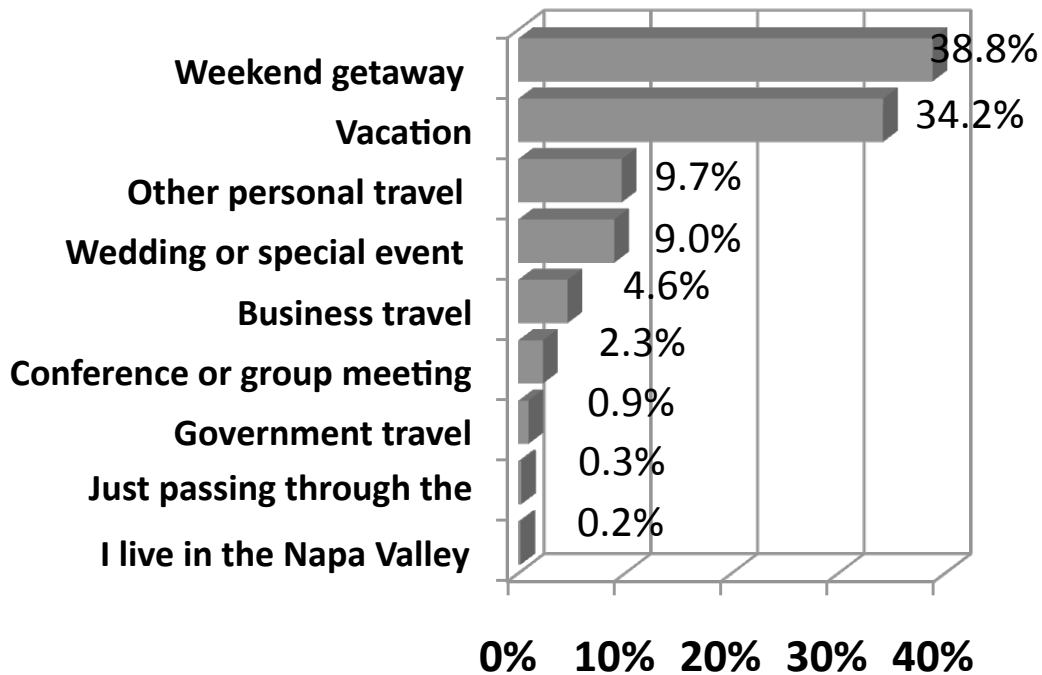
# Detailed Findings



# Primary Reason for Visiting Napa

In 2014 Napa Valley's visitors primarily came to the area for leisure purposes. Over two-thirds of visitors reported visiting for a weekend getaway (38.8%) or vacation (34.2%). About one in ten each visited for other personal reasons (9.7%) or to attend a wedding or special event (9.0%).

Chart 1: Primary Reason for Visit (All Visitors)



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>

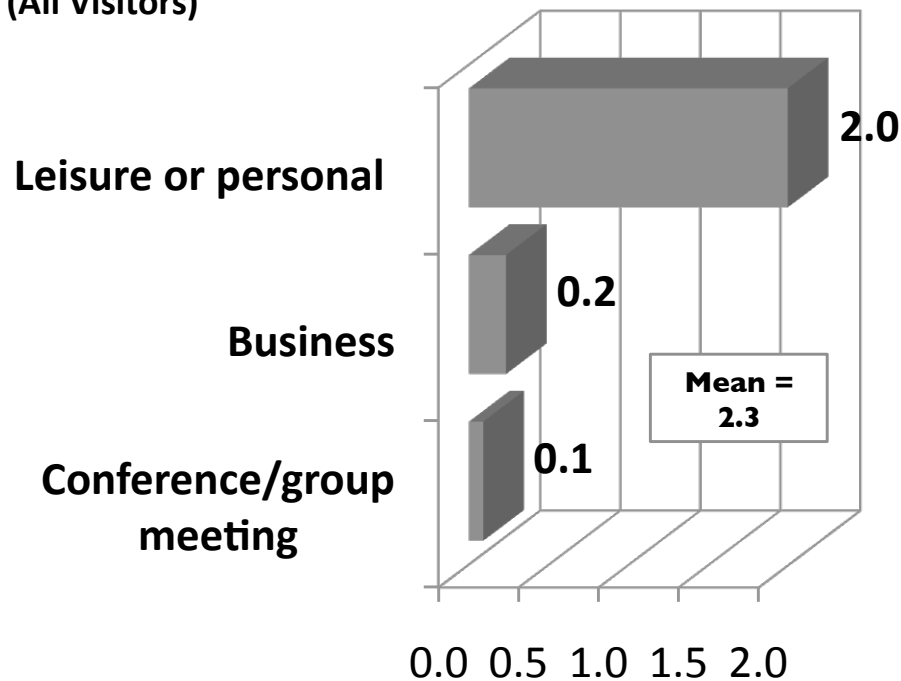
Base: All respondents. 1,740 completed surveys

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.** The average Napa Valley visitor in 2014 made 2.3 trips to Napa Valley in the past twelve months. This primarily consists of 2.0 leisure trips, followed by 0.2 business trips and 0.1 conference or other group meeting trips.

**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>

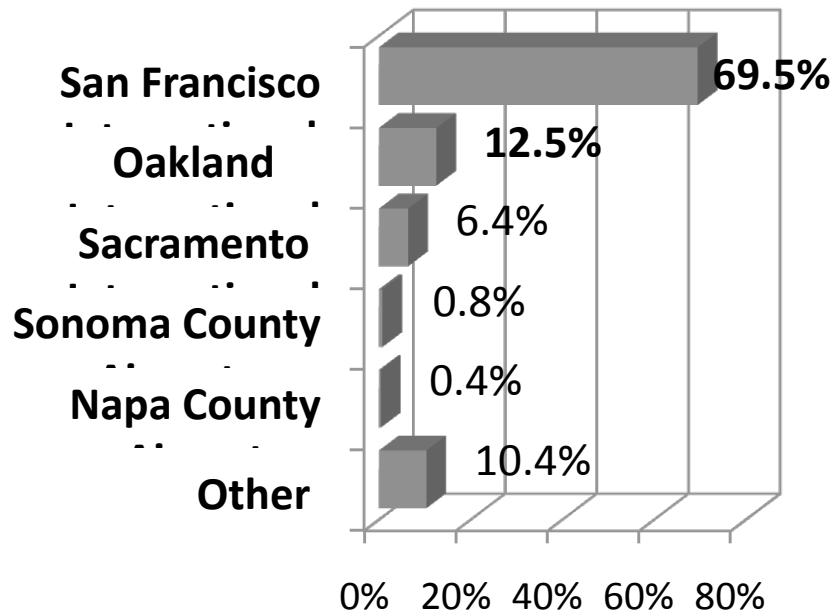
Question: Including this trip, how many visits to the Napa Valley have you made in the past twelve (12) months for each of the following reasons?

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 (69.5%).** Napa Valley visitors who arrived in the area via airplane were asked which airport they used. Visitors also flew into Oakland International Airport (12.5%), followed by Sacramento International Airport (6.4%).

Chart 3: Airport Used  
(Visitors arriving by air)



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>

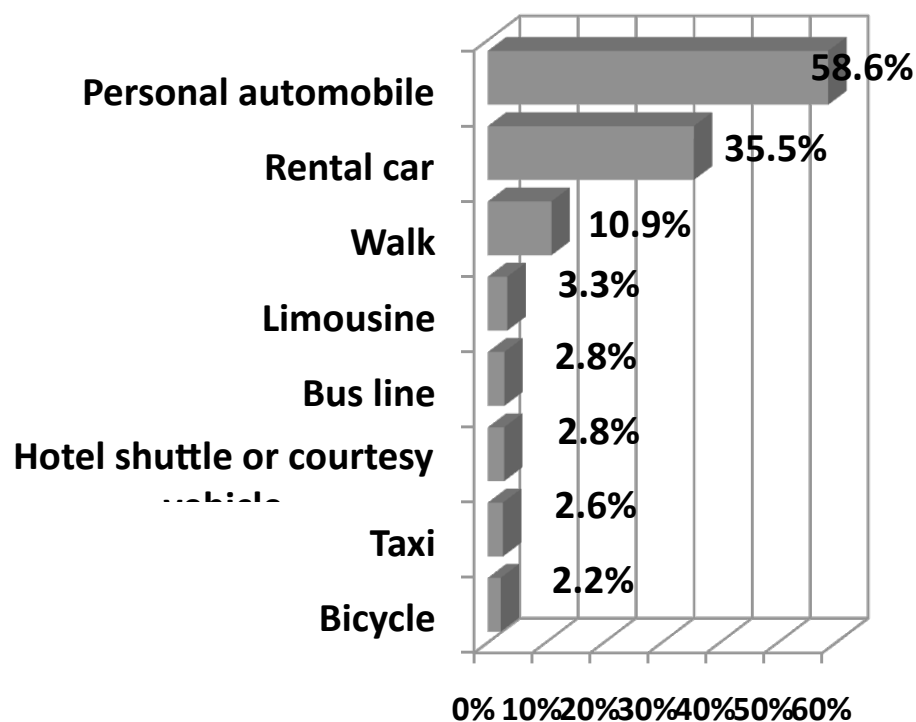
Base: Respondents who arrived by airplane. 833 completed surveys

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%). These visitors use either a personal car (58.6%) or rental car (35.5%). 10.9 percent reported walking while in the Napa Valley. A bike, limo, bus, hotel shuttle or taxi was used by approximately 15 percent of visitors.

Chart 4: Transportation Methods (All Visitors)



Base: All respondents. 1,816 completed surveys

Detail by Type of Visitor

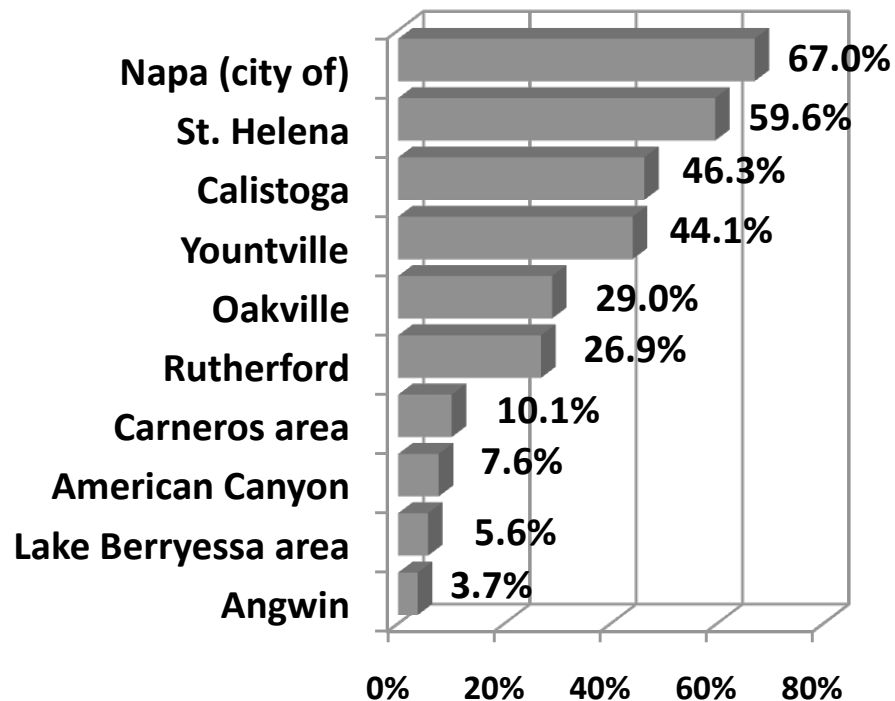
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Personal automobile	58.6%	54.9%	41.6%	61.6%
Rental car	35.5%	38.8%	50.3%	32.9%
Walk	10.9%	23.5%	10.7%	5.5%
Limousine	3.3%	6.1%	1.3%	2.3%
Bus line	2.8%	2.4%	4.0%	3.0%
Hotel shuttle or courtesy vehicle	2.8%	7.3%	1.3%	0.9%
Taxi	2.6%	5.0%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

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. The City of Napa (67.0%) and St. Helena (59.6%) were the Napa Valley towns with the highest visitor traffic during 2014. Nearly half of Napa Valley visitors surveyed visited Calistoga (46.3%) and Yountville (44.1%).

Chart 5: Napa Valley Towns Visited  
(All Visitors)



Detail by Type of Visitor

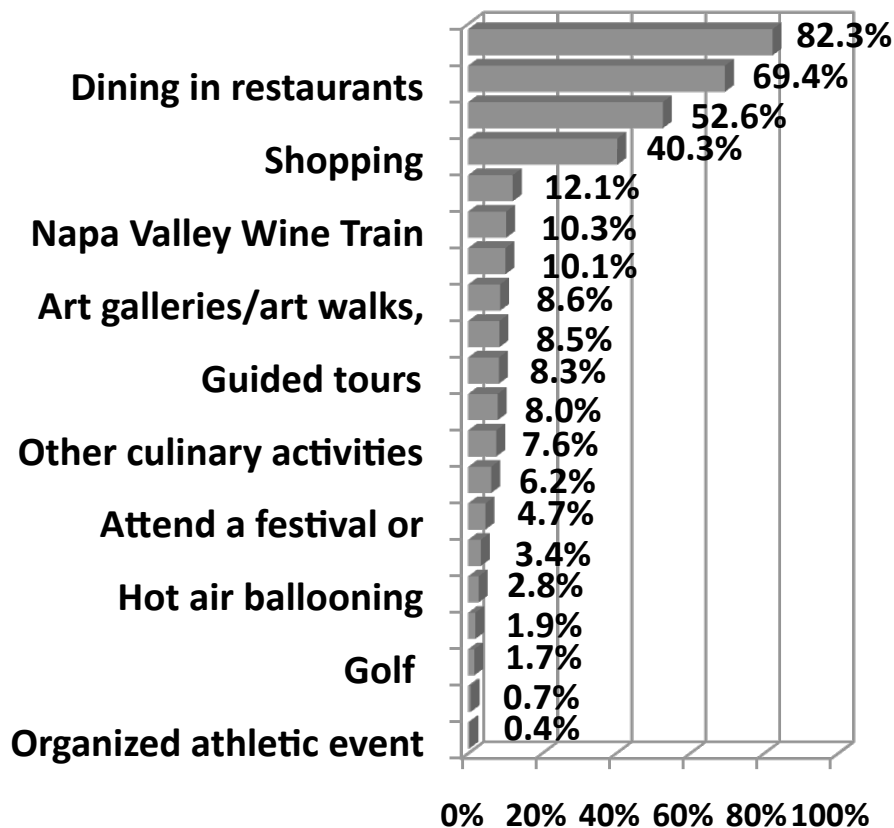
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Napa (City of)	67.0%	64.5%	73.2%	67.7%
St. Helena	59.6%	62.8%	74.5%	57.2%
Calistoga	46.3%	57.8%	55.7%	40.7%
Yountville	44.1%	51.4%	61.1%	39.7%
Oakville	29.0%	24.9%	35.6%	30.2%
Rutherford	26.9%	30.6%	34.9%	24.7%
Carneros area	10.1%	12.3%	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.** Visiting wine tasting rooms (82.3%) and dining in restaurants (69.4%) were the most popular activities among Napa Valley visitors. Visitors also went on winery tours (52.6%) and shopped in the Napa Valley (40.3%).

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



Base: All respondents. 1,822 completed surveys

**Detail by Type of Visitor**

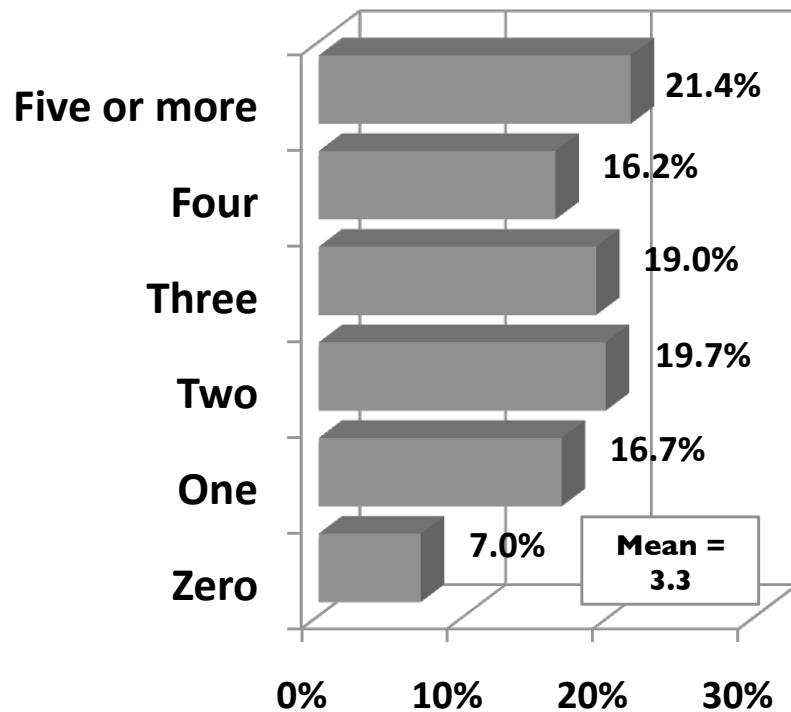
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine tasting rooms	82.3%	72.3%	89.9%	85.9%
Dining in restaurants	69.4%	89.2%	79.2%	60.3%
Winery tours	52.6%	40.7%	67.8%	56.5%
Shopping	40.3%	55.3%	51.0%	33.2%
Spa visit or treatment	12.1%	27.2%	13.4%	5.6%
Napa Valley Wine Train	10.3%	7.5%	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.** Over half of Napa Valley visitors went to three or more wineries or tasting rooms during their visit (56.7%). On average, visitors went to 3.3 wineries in 2014.

**Chart 7: Napa Valley Wineries Visited (All Visitors)**



**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?

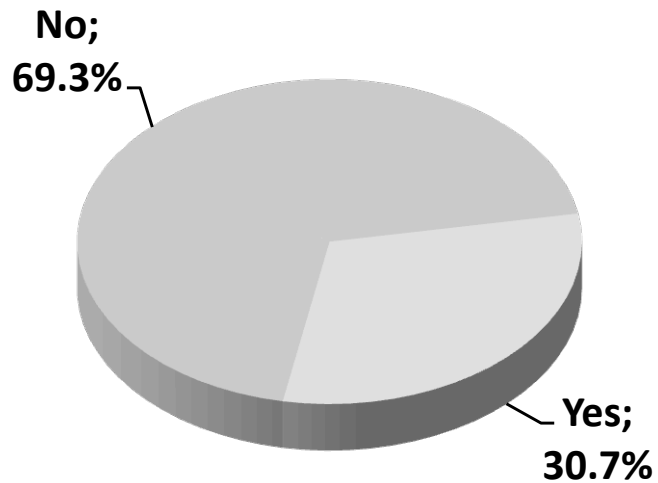
Base: All respondents. 1,740 completed surveys



# Winery Reservations

While the majority of Napa Valley visitors did not make advance appointments to visit wineries, nearly one in three indeed made reservations prior to visiting any Napa Valley wineries (30.7%).

Chart 8: Winery Reservations  
(All Visitors)



Base: All respondents. 1,764 completed surveys

Detail by Type of Visitor

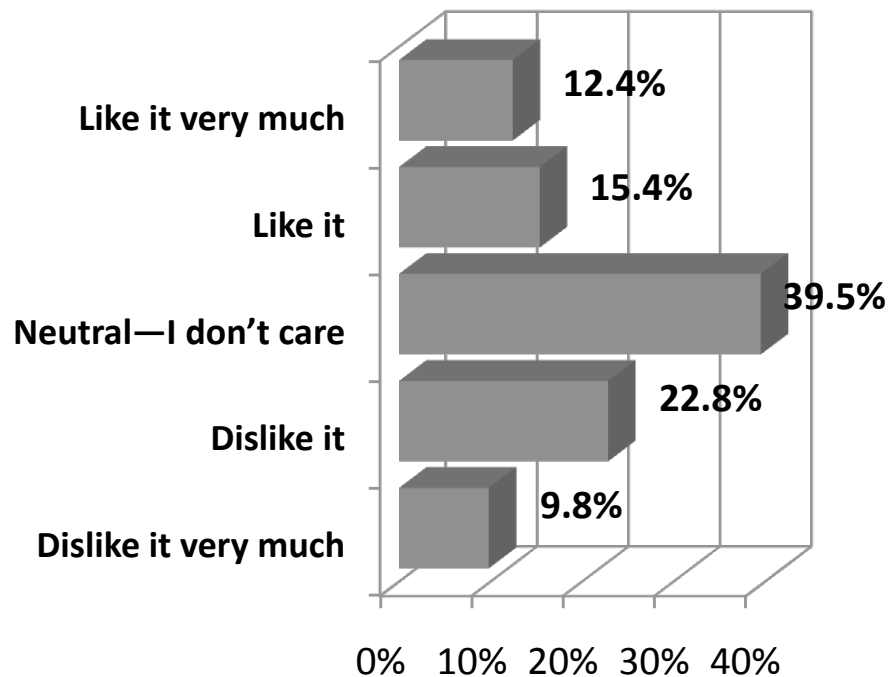
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Yes	30.7%	36.3%	47.2%	27.1%
No	69.3%	63.7%	52.8%	72.9%
Base	1,764	505	87	1,173

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

# Opinion on Winery Reservations

The majority of Napa Valley visitors feel neutrally about appointments at wineries. 39.5 percent of Napa Valley visitors felt neutrally or did not care about wineries requiring advance appointments for wine tasting. One quarter of visitors surveyed “Like it” or “Like it very much” (27.8%), while 32.6 percent reported dislike.

Chart 9: Opinion on Winery Reservations  
(All Visitors)



Base: All respondents. 1,797 completed surveys

Detail by Type of Visitor

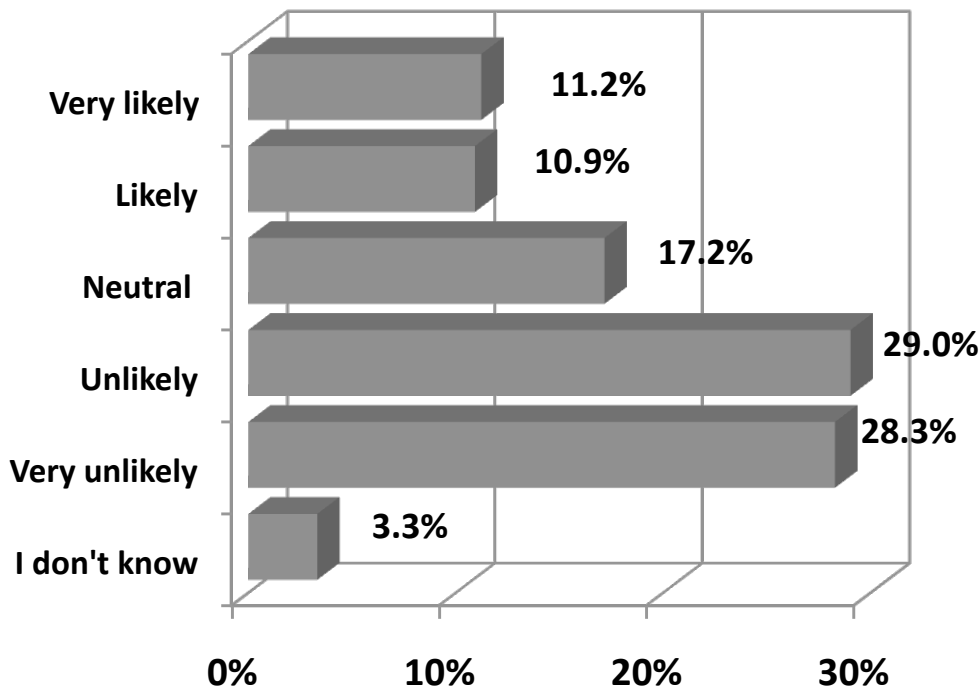
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Like it very much	12.4%	12.1%	18.8%	12.1%
Like it	15.4%	11.5%	13.4%	17.2%
Neutral—I don't care	39.5%	41.5%	32.2%	39.3%
Dislike it	22.8%	24.7%	25.5%	21.8%
Dislike it very much	9.8%	10.1%	10.1%	9.7%
Base	1,797	501	91	1,205

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

# Likelihood of Joining Wine Club (Intercept Survey)

**Likelihood to join a wine club is low among intercept respondents.** Day trip and VFR visitors were asked their likelihood of joining a wine club during their trip. 22.2 percent of these Napa Valley visitors in 2014 were “likely” (10.9%) or “very likely” (11.2%) to join a wine club.

**Chart 10: Likelihood of Joining Wine Club (Day trip & VFR Visitors)**



Base: All respondents. 1,275 completed surveys

**Detail by Type of Visitor**

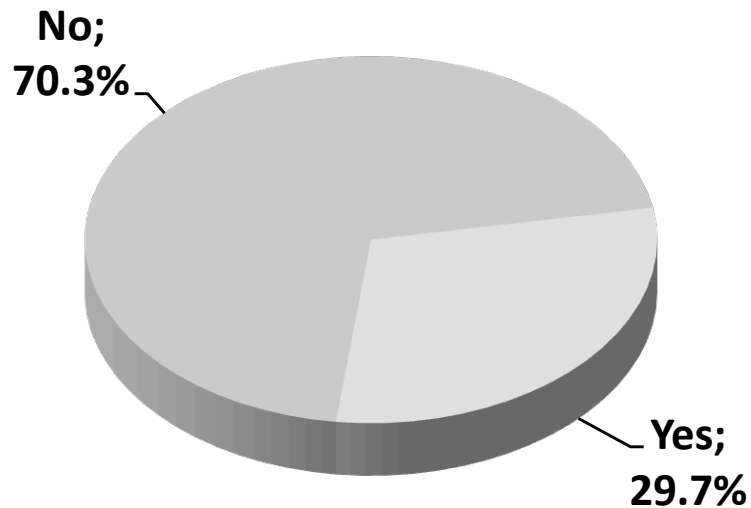
	Total (Day trip and VFR)	Visiting friends & relatives	Day-trip
Very likely	11.2%	16.0%	10.9%
Likely	10.9%	9.7%	11.0%
Neutral	17.2%	19.4%	17.0%
Unlikely	29.0%	29.9%	29.0%
Very unlikely	28.3%	20.8%	28.8%
I don't know	3.3%	4.2%	3.3%
<b>Base</b>	<b>1,275</b>	<b>88</b>	<b>1,187</b>

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

# Joined a Wine Club (Lodging Guest Survey)

Nearly one in three lodging guests joined a wine club (29.7%).

Chart 11: Joined a Wine Club  
(Lodging Guests)



Base: All respondents. 518 completed surveys

Detail by Type of Visitor

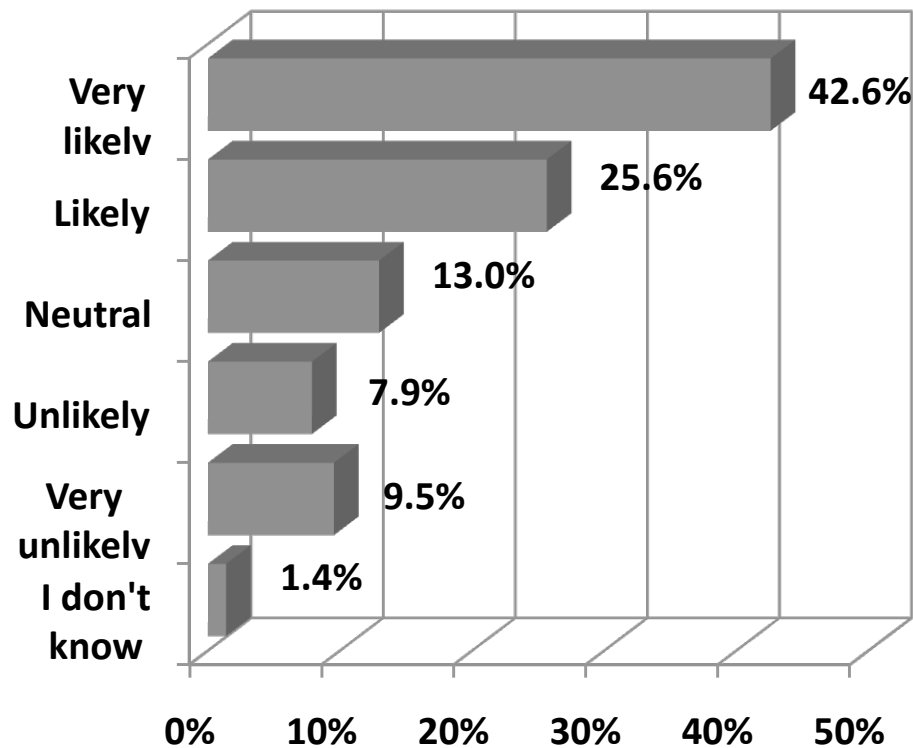
	Lodging guests
Yes	29.7%
No	70.3%
Base	518

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

# Likelihood of Buying Wine to Take Home (Intercept Survey)

The majority of intercept respondents reported high likelihood to purchase and take home wine. Day trip and VFR visitors were asked their likelihood of purchasing wine to take home. Two-thirds of these visitors were “Likely” (25.6%) or “Very likely” (42.6%) to buy wine to take home.

Chart 12: Likelihood of Buying Wine to Take Home (Day trip & VFR Visitors)



Detail by Type of Visitor

	Total (Day trip & VFR)	VFR	Day-trip
Very likely	42.6%	43.3%	42.5%
Likely	25.6%	22.0%	26.0%
Neutral	13.0%	15.7%	12.7%
Unlikely	7.9%	9.4%	7.7%
Very unlikely	9.5%	7.1%	9.8%
I don't know	1.4%	2.4%	1.3%
Base	955	77	877

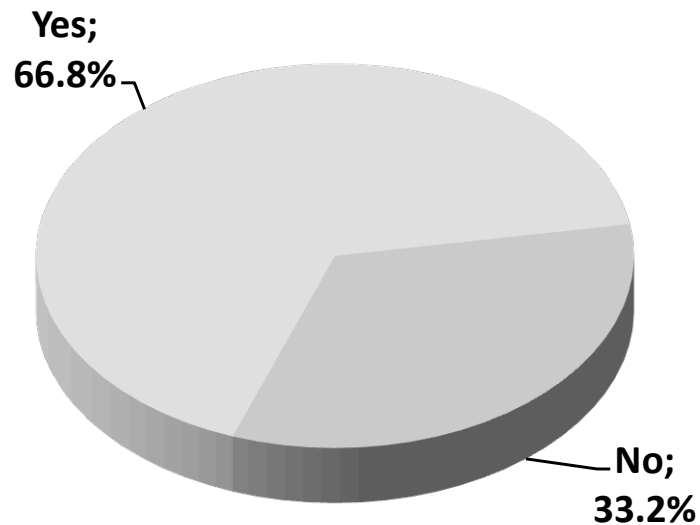
Question: How likely are you to buy wine at a winery to take with you or ship home?

Base: All respondents. 955 completed surveys

# Purchased Wine to Take Home (Lodging Guest Survey)

Two-thirds of lodging guests surveyed bought wine to take home (66.5%).

Chart 13: Purchased Wine to Take Home (Lodging Guests)



Base: All respondents. 424 completed surveys

Detail by Type of Visitor

	Lodging Guests
Yes	66.8%
No	33.2%
Base	424

Question: Did you buy wine at a winery to take with you or ship home?

# Spending in Napa Valley

In 2014, Napa Valley visitors spent an average of \$482.71 per day in-market. The bulk of this spending is attributed to wine bottles purchased at wineries (\$130.64), followed by Restaurants (\$124.97).

Chart 14: Spending in Napa Valley  
(All Visitors)



Base: All respondents. 1,848 completed surveys

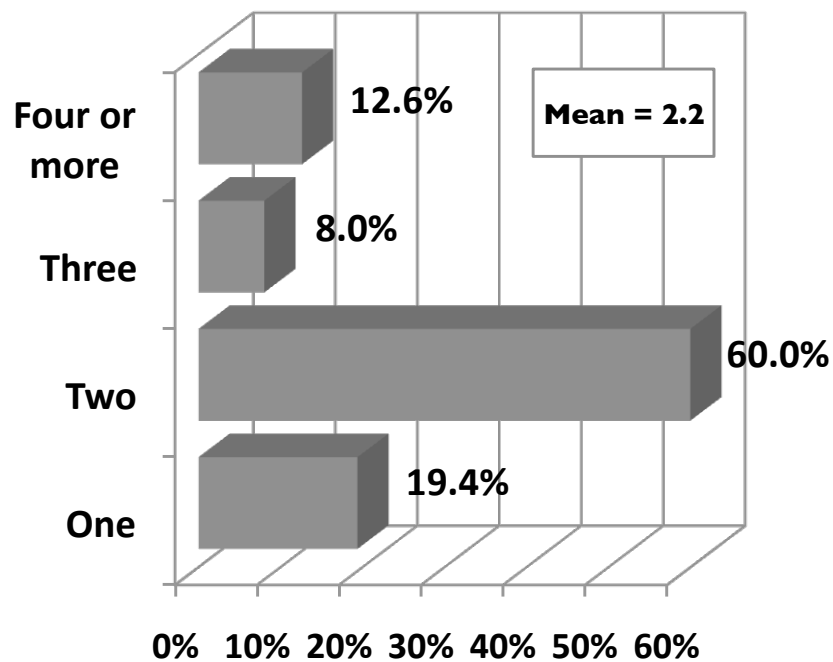
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine (bottles purchased at wineries)	\$130.64	\$172.12	\$175.63	\$110.22
Restaurants	\$124.97	\$172.18	\$181.71	\$100.28
Lodging	\$84.98	\$280.43	\$31.12	\$7.19
Tasting room fees	\$54.09	\$49.85	\$57.81	\$55.56
Clothing & jewelry	\$20.01	\$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?

# Number of Persons Covered by Spending

**Reported visitor spending usually covers more than one visitor.** The average daily spending reported in the previous question covered an average of 2.2 persons.

**Chart 15: Number of Persons Covered by Spending (All Visitors)**



Base: All respondents. 1,702 completed surveys

**Detail by Type of Visitor**

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Four or more	12.6%	7.2%	17.7%	14.6%
Three	8.0%	4.5%	3.5%	9.9%
Two	60.0%	74.2%	57.4%	54.0%
One	19.4%	14.2%	21.3%	21.5%
Mean	2.2	2.1	2.3	2.3
Base	1,702	489	86	1,128

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



# Average Daily Spending Per Person

With average daily spending covering an average of 2.2 people, it is estimated that the average Napa Valley visitor represents \$217.43 in daily in-market spending.

Chart 16: Average Daily Spending Per Person (All Visitors)



Base: All respondents. 1,848 completed surveys

Detail by Type of Visitor

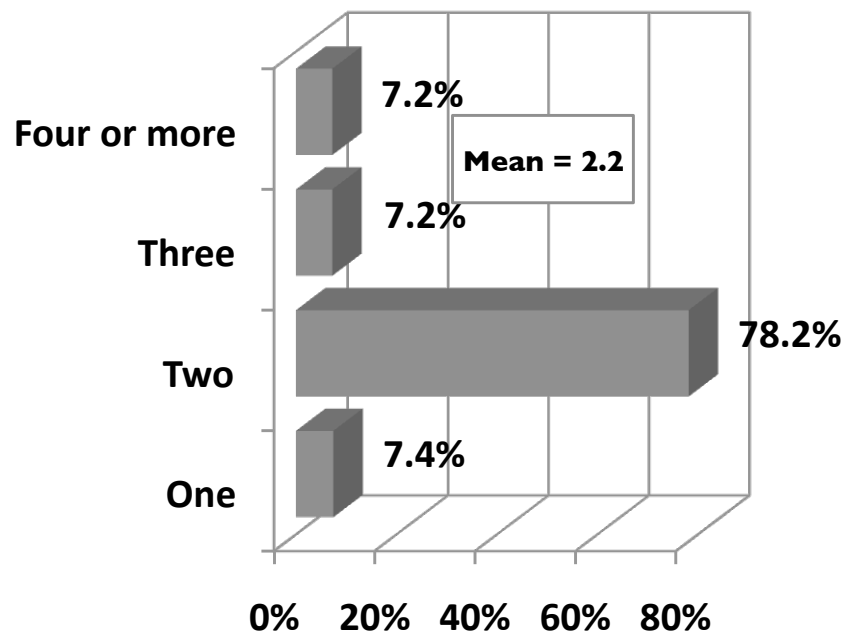
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Wine (bottles purchased at wineries)	\$58.84	\$83.04	\$77.63	\$48.33
Restaurants	\$56.29	\$83.07	\$80.32	\$43.97
Lodging	\$38.28	\$135.30	\$13.75	\$3.15
Tasting room fees	\$24.37	\$24.05	\$25.55	\$24.36
Clothing & jewelry	\$9.01	\$16.46	\$15.34	\$5.90
Entertainment & sightseeing	\$8.24	\$9.46	\$12.98	\$7.44
Gas, parking & transit	\$7.63	\$13.37	\$9.38	\$5.40
Souvenirs	\$6.15	\$7.45	\$5.93	\$5.69
Wine (retail stores)	\$2.95	\$4.88	\$3.45	\$2.23
Other retail purchases	\$2.64	\$3.80	\$4.58	\$2.10
Car rental	\$0.86	\$2.79	\$0.84	\$0.20
All other	\$2.17	\$5.75	\$1.99	\$0.97
<b>Mean</b>	<b>\$217.43</b>	<b>\$389.44</b>	<b>\$251.74</b>	<b>\$149.74</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?

# Number of People in Room (Lodging Guest Survey)

**Napa Valley lodging guests commonly travel with one other person.** Lodging guests were asked how many people stayed in their lodging room. Over three-fourths of lodging guests shared their room with one other person (77.8%). The average lodging room accommodated 2.2 persons.

**Chart 17: Number of People in Room (Lodging Guests)**



Base: All respondents. 595 completed surveys

**Detail by Type of Visitor**

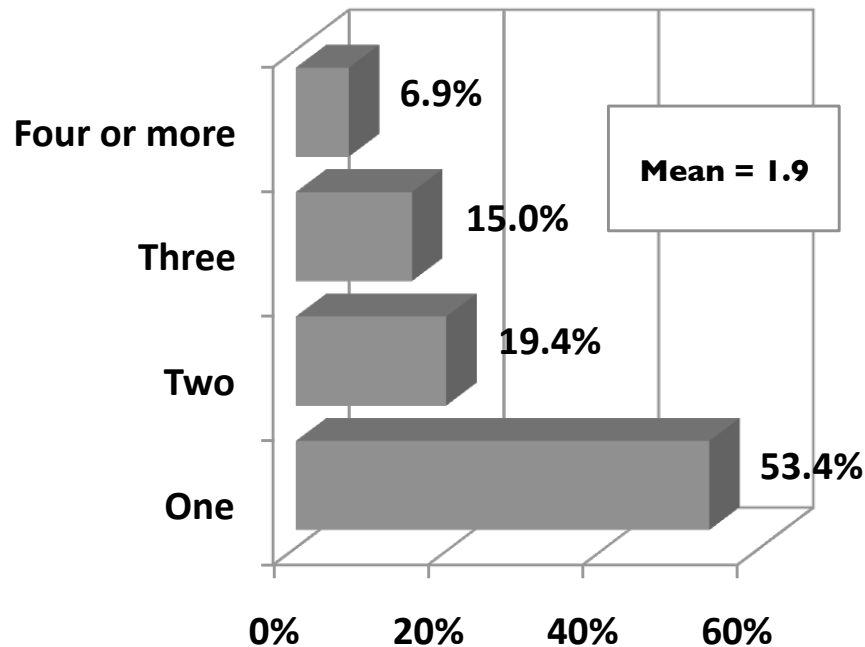
	Total	Lodging guests
Four or more	7.2%	7.2%
Three	7.2%	7.2%
Two	78.2%	78.2%
One	7.4%	7.4%
Mean	2.2	2.2
Base	501	501

Question: How many people stayed in your hotel/motel/inn/B&B room, including yourself?

# Length of Stay

In 2014, the average Napa Valley visitor spent 1.9 days in the area during their trip. Visitors staying in a private home in the area had the longest length of stay, with a reported average of 3.1 days. Those staying in commercial lodging spent 2.9 days in Napa Valley on average.

Chart 18: Length of Stay



Detail by Type of Visitor

	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Four or more	6.9%	13.8%	13.3%	1.8%
Three	15.0%	29.5%	34.5%	4.1%
Two	19.4%	34.8%	29.2%	8.8%
One	53.4%	10.6%	6.2%	84.9%
<b>Mean</b>	<b>1.9</b>	<b>2.9</b>	<b>3.1</b>	<b>1.2</b>
<b>Base</b>	<b>1,366</b>	<b>505</b>	<b>69</b>	<b>792</b>

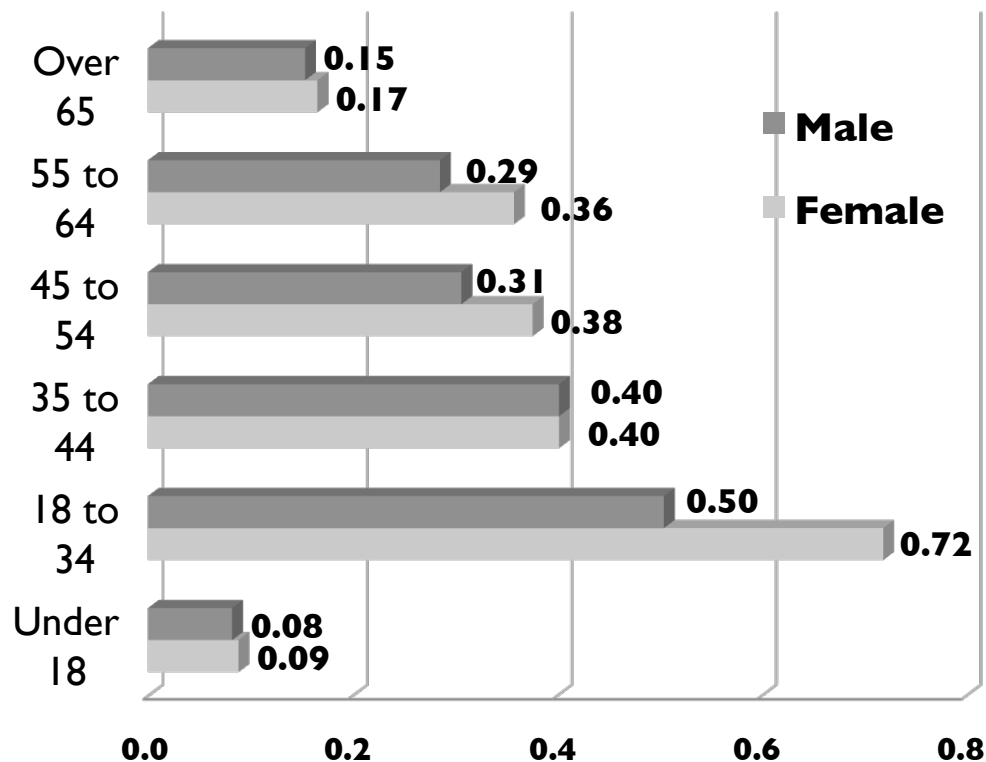
Question: How many days will you spend in the Napa Valley?

Base: All respondents. 1,366 completed surveys

# Travel Party Size

The average Napa Valley travel party in 2014 consisted of 3.8 persons. This was comprised of 1.7 males and 2.1 females. 9.4 percent of visitors surveyed traveled with children under 18.

Chart 19: Travel Party Size  
(All Visitors)



Base: All respondents. 1,807 completed surveys

Detail by Type of Visitor

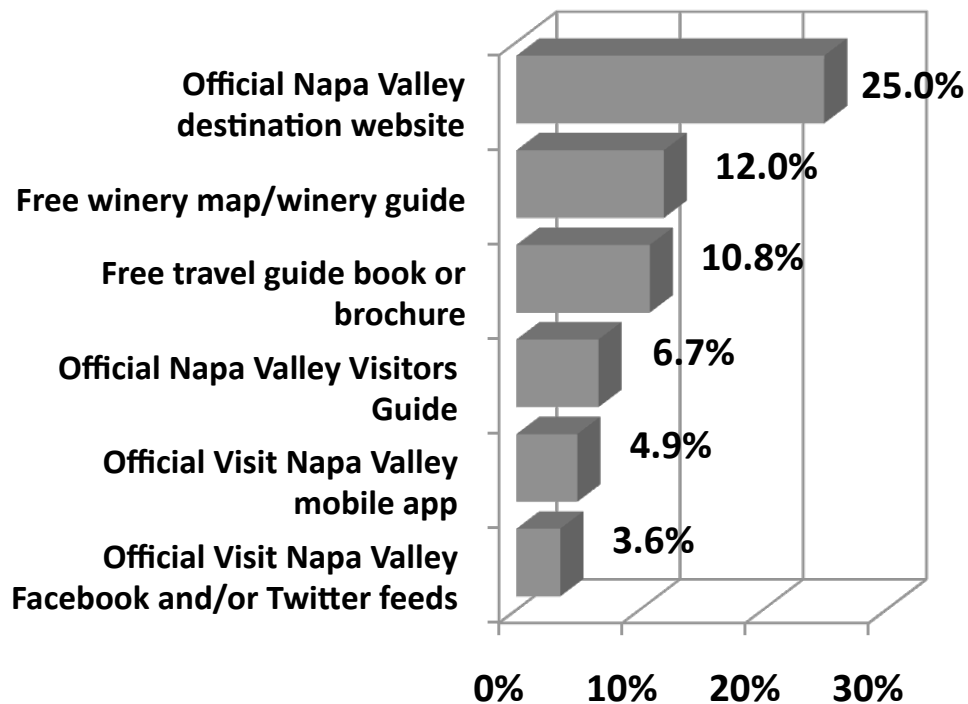
	Lodging Guests	VFR	Day-trip
Males over 65	0.20	0.12	0.14
Males 55 to 64	0.29	0.29	0.28
Males 45 to 54	0.24	0.40	0.33
Males 35 to 44	0.15	0.44	0.51
Males 18 to 34	0.14	0.37	0.67
Males under 18	0.05	0.10	0.09
Females over 65	0.21	0.25	0.14
Females 55 to 64	0.43	0.34	0.33
Females 45 to 54	0.31	0.51	0.39
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.

# Planning Resources Used Before Arrival

Prior to arriving in Napa Valley, visitors most commonly use the **Official Napa Valley destination website, VisitNapaValley.com, to help plan their trip (25.0%)**. 12.0 percent used a free winery map or guide, followed by one in ten who used free travel guide books or brochures (10.8%) and 6.7 percent who used the Official Napa Valley Visitors Guide.

**Chart 20: Planning Resource Used Before Arrival (All Visitors)**



Base: All respondents. 1,848 completed surveys

**Detail by Type of Visitor**

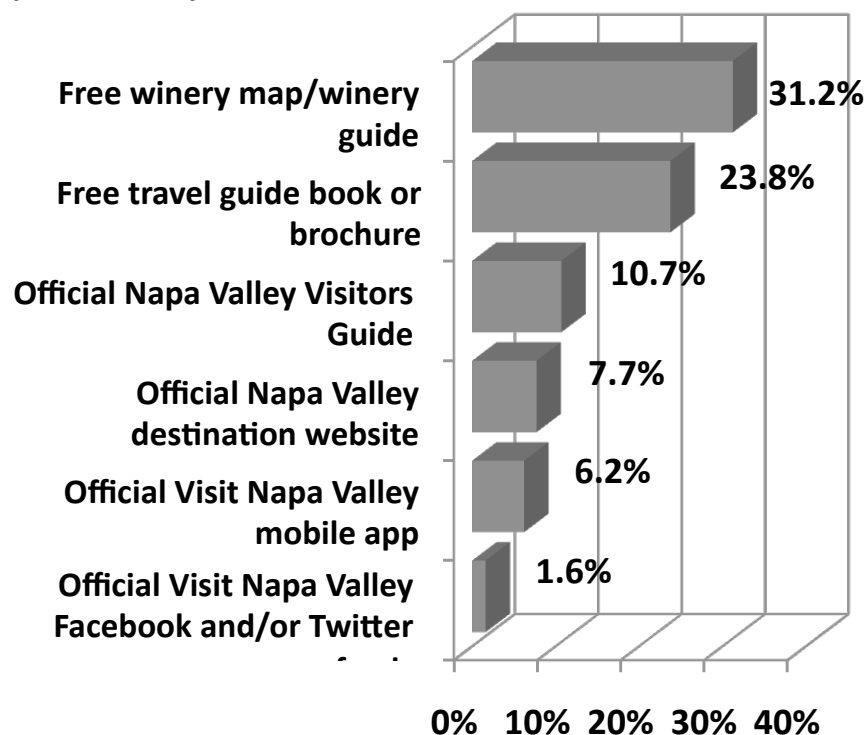
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Official Napa Valley destination website	38.8%	33.6%	34.5%	41.6%
Free winery map/winery guide	34.2%	37.1%	48.6%	31.7%
Free travel guide book or brochure	9.7%	6.0%	2.0%	12.0%
Official Napa Valley Visitors Guide	9.0%	12.8%	10.1%	7.1%
Official Visit Napa Valley mobile app	4.6%	3.6%	2.0%	5.3%
Official Visit Napa Valley Facebook and/or Twitter feeds	2.3%	2.4%	2.0%	2.3%
<b>Base</b>	<b>1,086</b>	<b>286</b>	<b>41</b>	<b>759</b>

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?

# Planning Resources Used While in Napa Valley

Once in-market, free winery maps (31.2%) and free travel guide books (23.8%) were the most popular travel planning resources used by Napa Valley visitors. 10.7 percent used the Official Napa Valley visitors guide.

Chart 21: Planning Resources Used While in Napa Valley (All Visitors)



Base: All respondents. 1,848 completed surveys

Detail by Type of Visitor

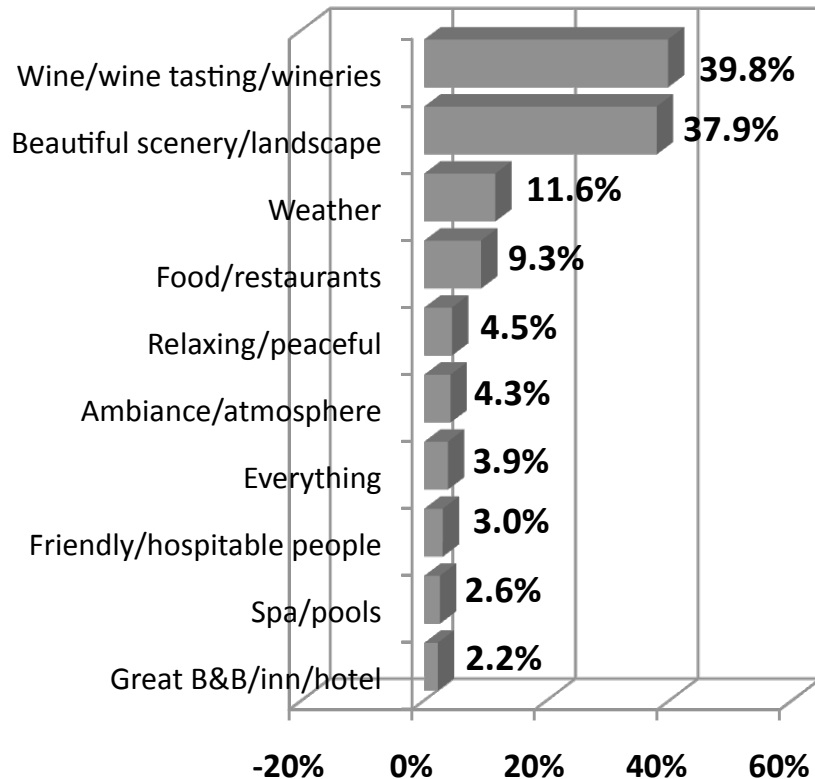
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Free winery map/winery guide	31.2%	38.3%	35.1%	27.9%
Free travel guide book or brochure	23.8%	26.6%	27.8%	22.2%
Official Napa Valley Visitors Guide	10.7%	15.2%	13.2%	8.6%
Official Napa Valley destination website	7.7%	6.1%	9.3%	8.3%
Official Visit Napa Valley mobile app	6.2%	3.7%	10.6%	7.0%
Official Visit Napa Valley Facebook and/or Twitter feeds	1.6%	1.6%	4.0%	1.4%
<b>Base</b>	<b>1,012</b>	<b>276</b>	<b>38</b>	<b>698</b>

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?

# 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.** Approximately one in ten reported the area's weather (11.6%) and restaurants (9.3%) as aspects they liked best about Napa Valley.

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



Base: All respondents. 1,848 completed surveys

**Detail by Type of Visitor**

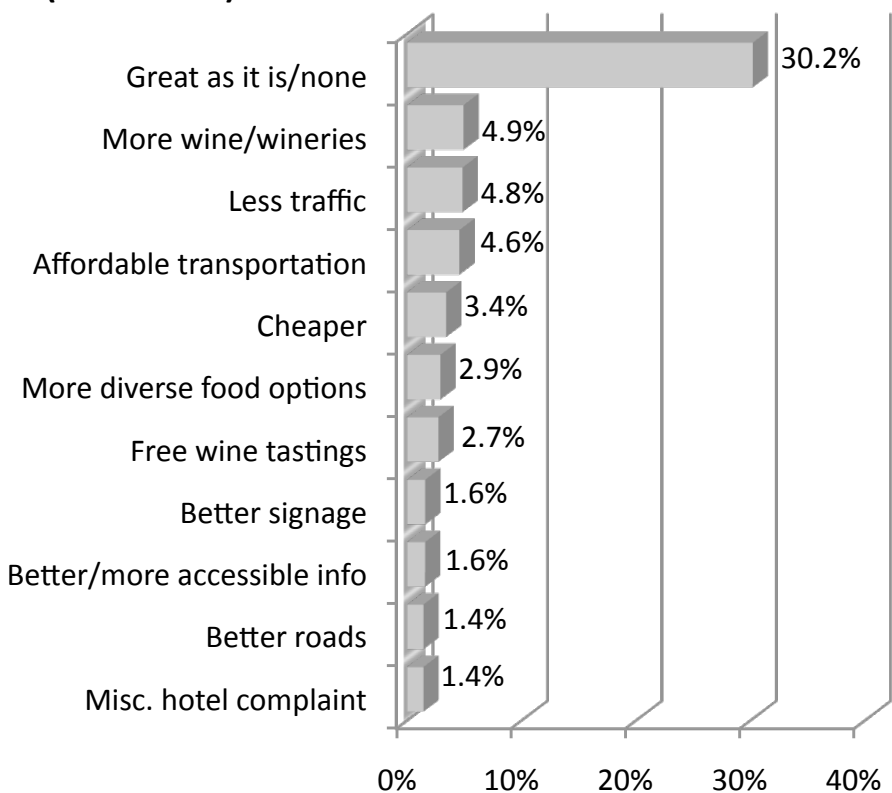
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>Wine/wine tasting/wineries</b>	39.8%	32.9%	39.1%	42.8%
<b>Beautiful scenery/landscape</b>	37.9%	20.3%	32.5%	45.9%
<b>Weather</b>	11.6%	9.3%	23.2%	11.7%
<b>Food/restaurants</b>	9.3%	16.6%	7.9%	6.2%
<b>Relaxing/peaceful</b>	4.5%	8.3%	2.6%	3.0%
<b>Ambiance/atmosphere</b>	4.3%	3.3%	4.0%	4.7%
<b>Everything</b>	3.9%	5.4%	4.0%	3.2%
<b>Friendly/hospitable people</b>	3.0%	4.8%	6.6%	2.0%
<b>Spa/pools</b>	2.6%	8.3%	0.0%	0.3%
<b>Great B&amp;B/inn/hotel</b>	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%).** In open ended question that asked visitors what could enhance the Napa Valley, one in three stated that the destination does not need any improvements. Of the actual suggestions provided, about five percent of respondents reported that “more wineries” (4.9%), “less traffic” (4.8%) and “affordable transportation” (4.6%) would enhance the Napa Valley.

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

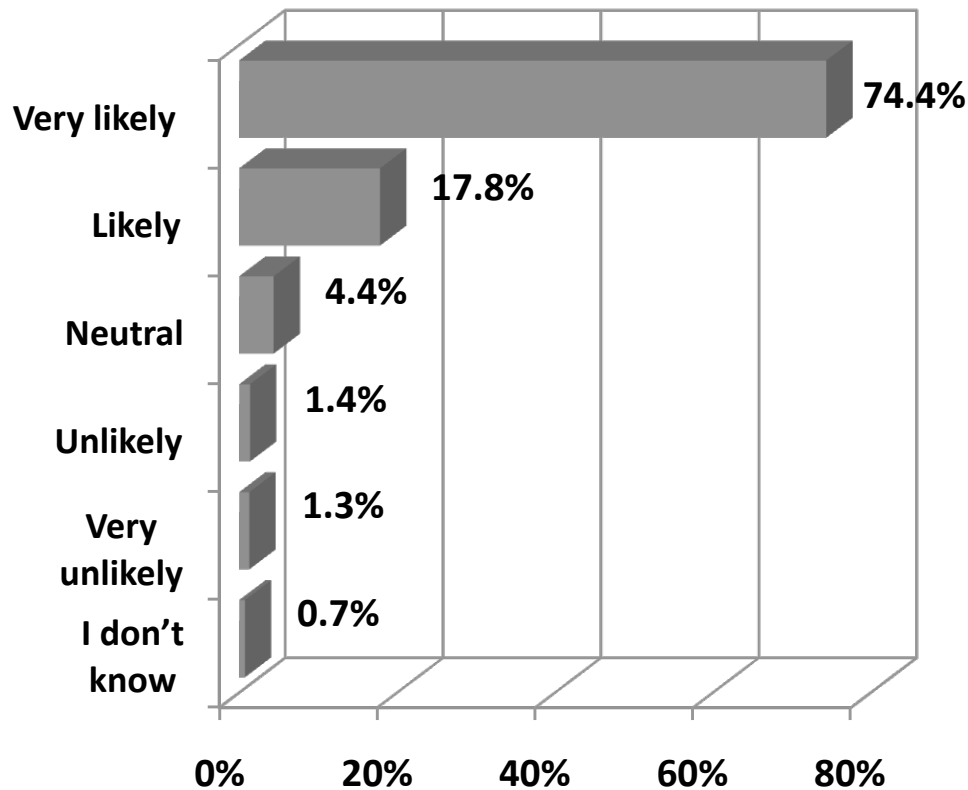
Question: In your opinion, what attractions or services would most enhance the Napa Valley?



# 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

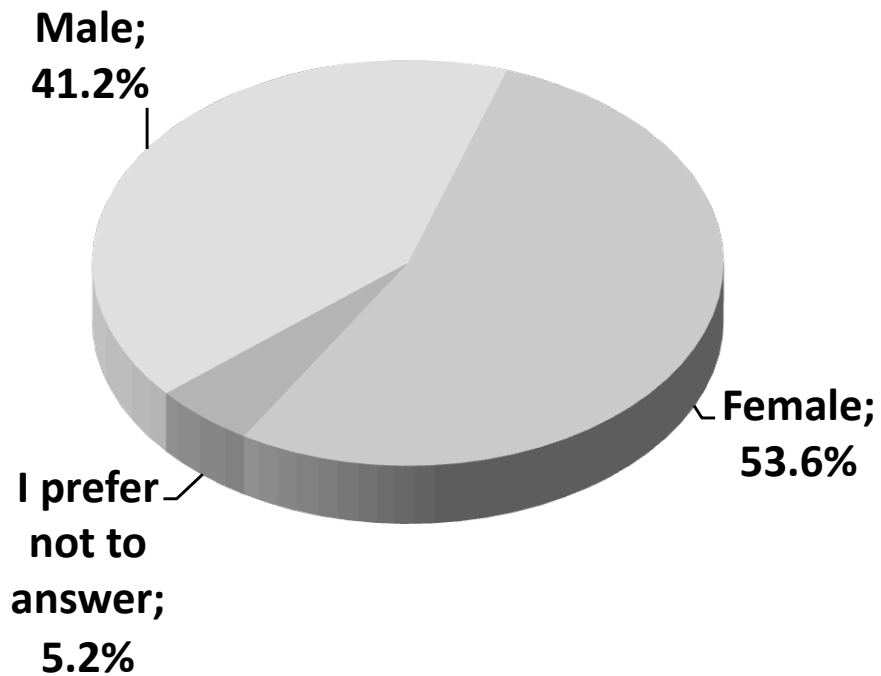
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Very likely	74.4%	83.4%	75.2%	70.5%
Likely	17.8%	12.4%	17.4%	20.2%
Neutral	4.4%	2.2%	4.0%	5.3%
Unlikely	1.4%	0.7%	0.7%	1.7%
Very unlikely	1.3%	0.2%	1.3%	1.7%
I don't know	0.7%	1.1%	1.3%	0.5%
<b>Base</b>	<b>1,816</b>	<b>517</b>	<b>91</b>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

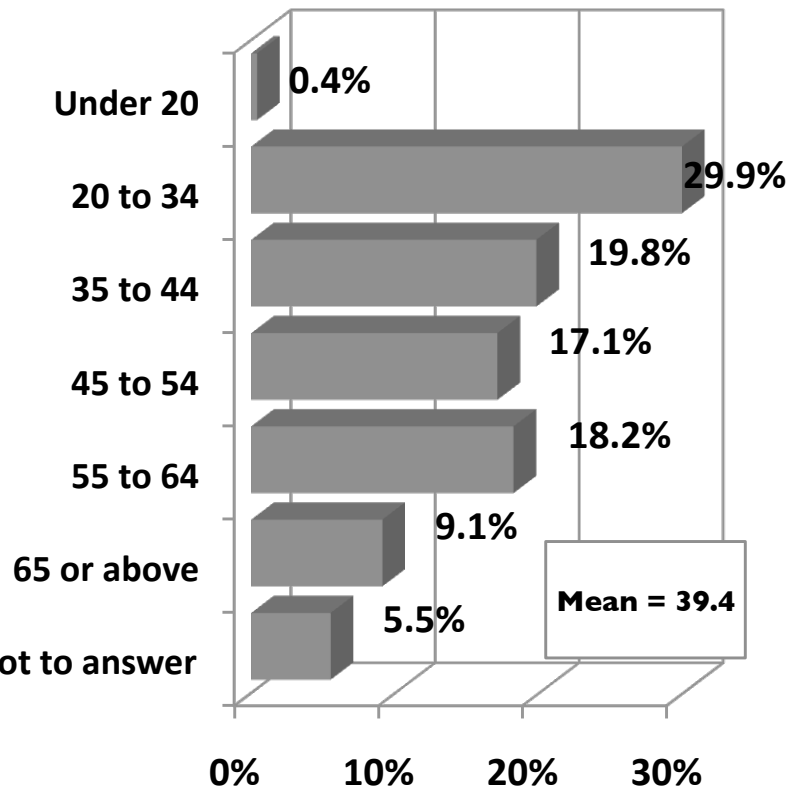
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>Female</b>	53.6%	63.6%	49.6%	49.4%
<b>Male</b>	41.2%	35.0%	40.1%	44.1%
<b>I prefer not to answer</b>	5.2%	1.4%	10.2%	6.5%
<b>Base</b>	<b>1,738</b>	<b>519</b>	<b>84</b>	<b>1136</b>

Question: What is your gender?

# Age

The average Napa Valley visitor in 2014 was 39.4 years of age. Over 60 percent of survey respondents were 35 years of age or older (64.2%).

Chart 27: Age



Base: All respondents. 1,751 completed surveys

Detail by Type of Visitor

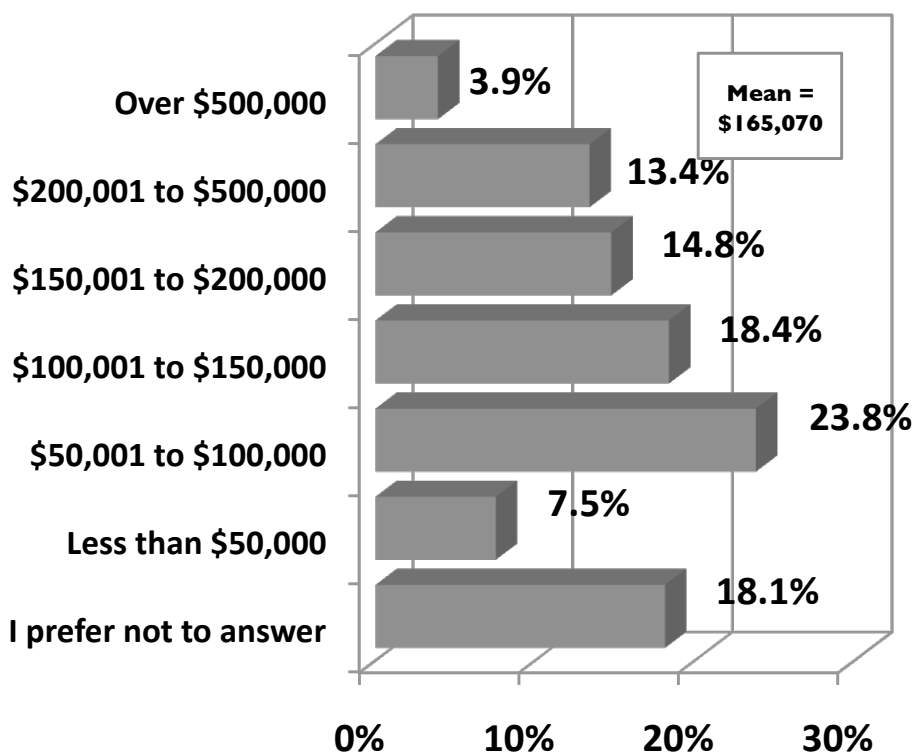
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Under 20	0.4%	0.4%	0.0%	0.4%
20 to 34	29.9%	13.8%	24.6%	37.6%
35 to 44	19.8%	14.8%	23.2%	21.8%
45 to 54	17.1%	22.3%	16.7%	14.8%
55 to 64	18.2%	29.9%	18.1%	12.9%
65 or above	9.1%	17.2%	8.7%	5.5%
I prefer not to answer	5.5%	1.6%	8.7%	7.0%
<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.** 50.5 percent reported an annual household income of \$100,000 or more. The average annual Napa Valley visitor's household income was \$165,070.

**Chart 28: Income (All Visitors)**



Base: All respondents. 1,740 completed surveys

**Detail by Type of Visitor**

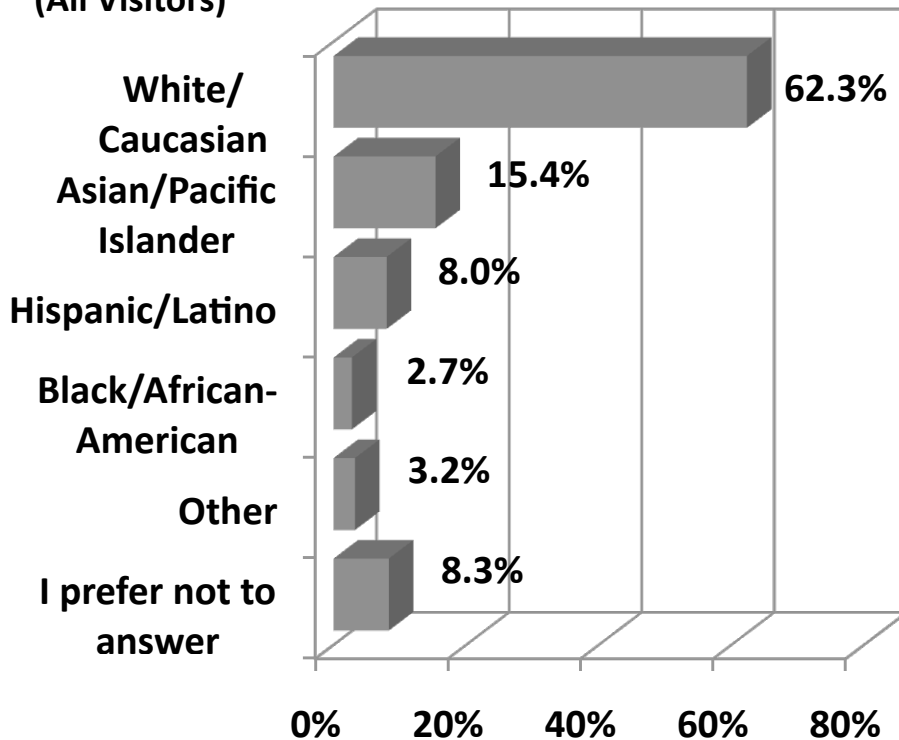
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
Over \$500,000	3.9%	5.9%	0.7%	3.2%
\$200,001 to \$500,000	13.4%	19.8%	11.0%	10.7%
\$150,001 to \$200,000	14.8%	17.0%	11.8%	14.0%
\$100,001 to \$150,000	18.4%	18.0%	25.0%	18.1%
\$50,001 to \$100,000	23.8%	16.2%	29.4%	26.8%
Less than \$50,000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

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.** The next largest group is Asian, Pacific Islander (15.%), followed by Hispanic/Latino (8.0%).

Chart 28: Ethnicity  
(All Visitors)



Base: All respondents. 1,747 completed surveys

Detail by Type of Visitor

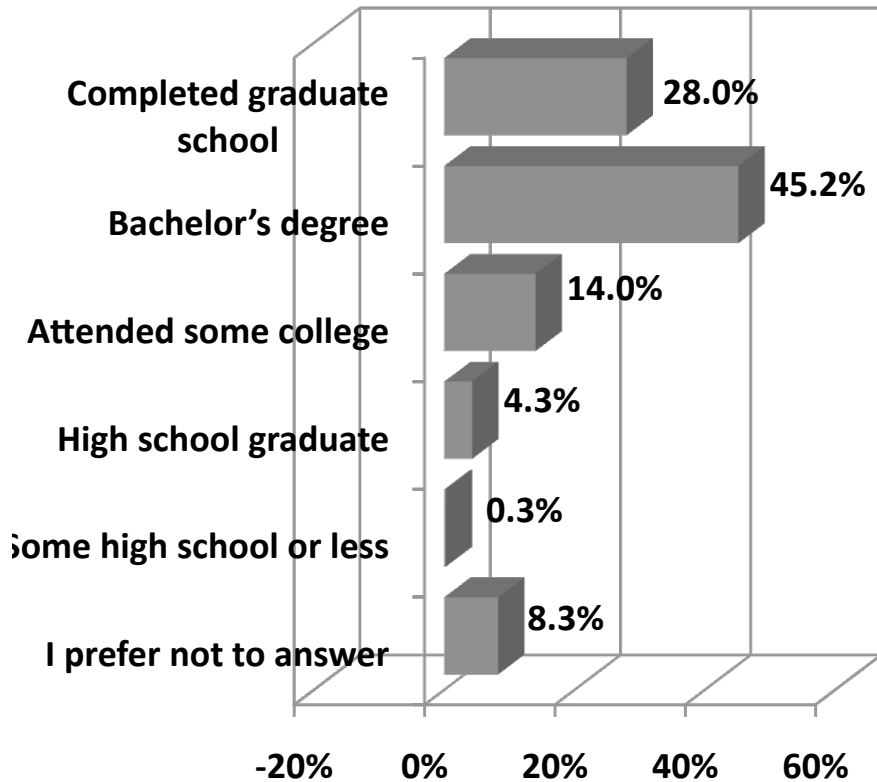
	All visitors	Lodging guests	Visiting friends & relatives	Day-trip
<b>White/Caucasian</b>	62.3%	79.0%	74.5%	54.0%
<b>Asian/Pacific Islander</b>	15.4%	7.2%	5.8%	19.7%
<b>Hispanic/Latino</b>	8.0%	4.6%	7.3%	9.6%
<b>Black/African-American</b>	2.7%	1.8%	2.2%	3.2%
<b>Other</b>	3.2%	1.3%	1.5%	4.2%
<b>I prefer not to answer</b>	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.** 73.2 percent have at least a bachelor’s degree, including 28.0 percent have completed graduated school.

**Chart 29: Education  
(All Visitors)**



Base: All respondents. 1,747 completed surveys

**Detail by Type of Visitor**

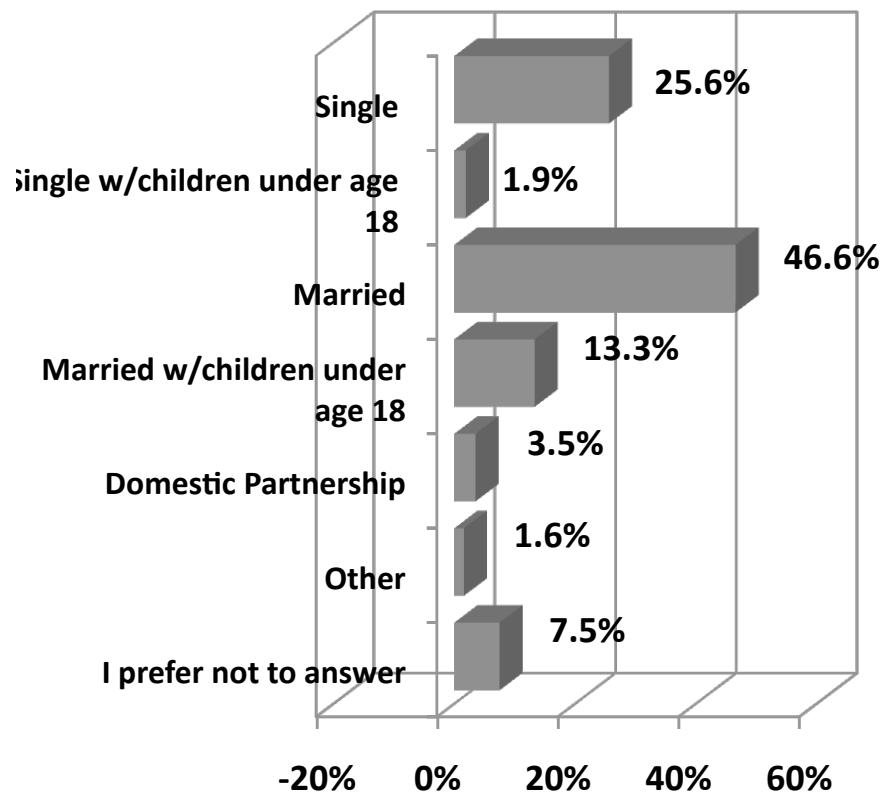
	Total	Lodging Guest	VFR	Day-trip
<b>Completed graduate school</b>	28.0%	36.2%	24.1%	24.5%
<b>Bachelor's degree</b>	45.2%	41.1%	47.4%	46.8%
<b>Attended some college</b>	14.0%	16.1%	11.7%	13.3%
<b>High school graduate</b>	4.3%	2.6%	5.8%	4.9%
<b>Some high school or less</b>	0.3%	0.0%	1.5%	0.3%
<b>I prefer not to answer</b>	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%). 28.0 percent is single, and 15.8 percent have children under 18.

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 identifies 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>

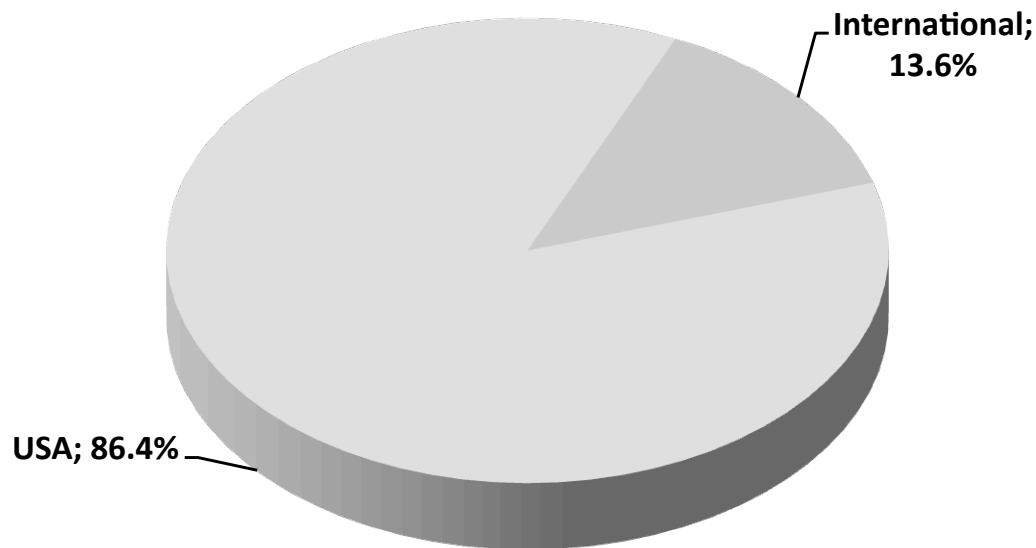
Question: Which best describes you? 11



# 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)**



**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>

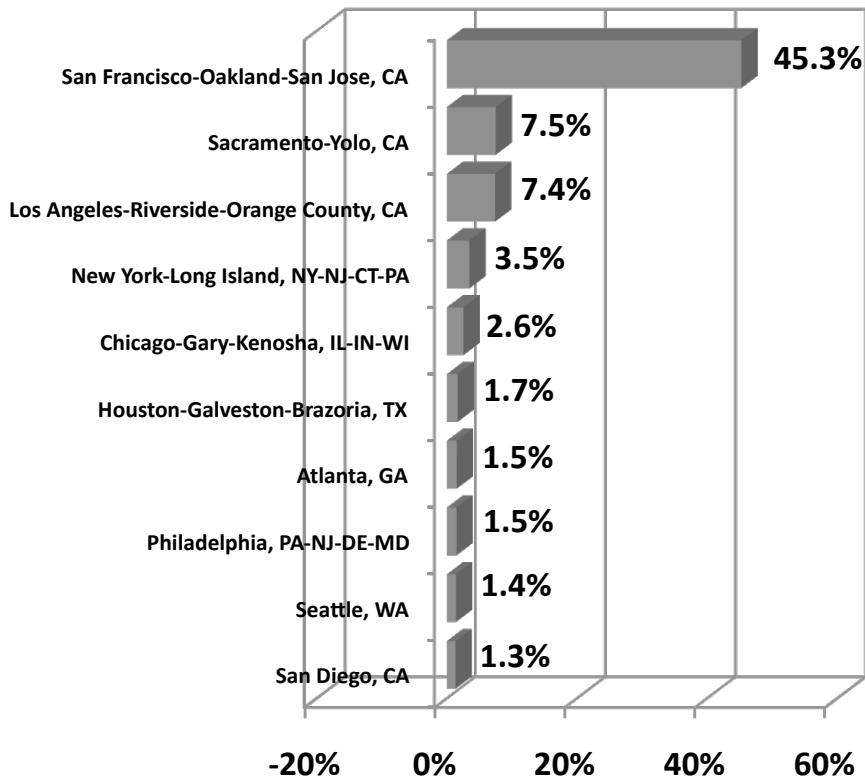
Question: What is your country of residence?

Base: All respondents. 1,743 completed surveys

# Point of Origin: MSA

**Napa Valley's top domestic feeder market is the San Francisco-Oakland-San Jose MSA (45.3%).** Other top feeder markets include the Sacramento-Yolo MSA (7.5%) and the Los Angeles-Riverside-Orange County MSA (7.4%).

**Chart 33: 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?