



LEGENDARY  
NAPA  
VALLEY

# FISCAL YEAR 2016 ANNUAL REPORT

# AGENDA

Thank you for having us!

- Lodging Metrics
- Financial Overview
- Marketing & Communications
- Sales
- Sponsorships
- Community & Government Relations
- Napa Valley Welcome Center
- Research & Market Intelligence





# LODGING METRICS

# LODGING METRICS - STR DATA

	FY16	% Change
Occupancy	73.2%	+4.9%
ADR	\$295.53	+4.3%
RevPAR	\$216.19	+9.4%
Revenue	\$373.1 m	+11.7%

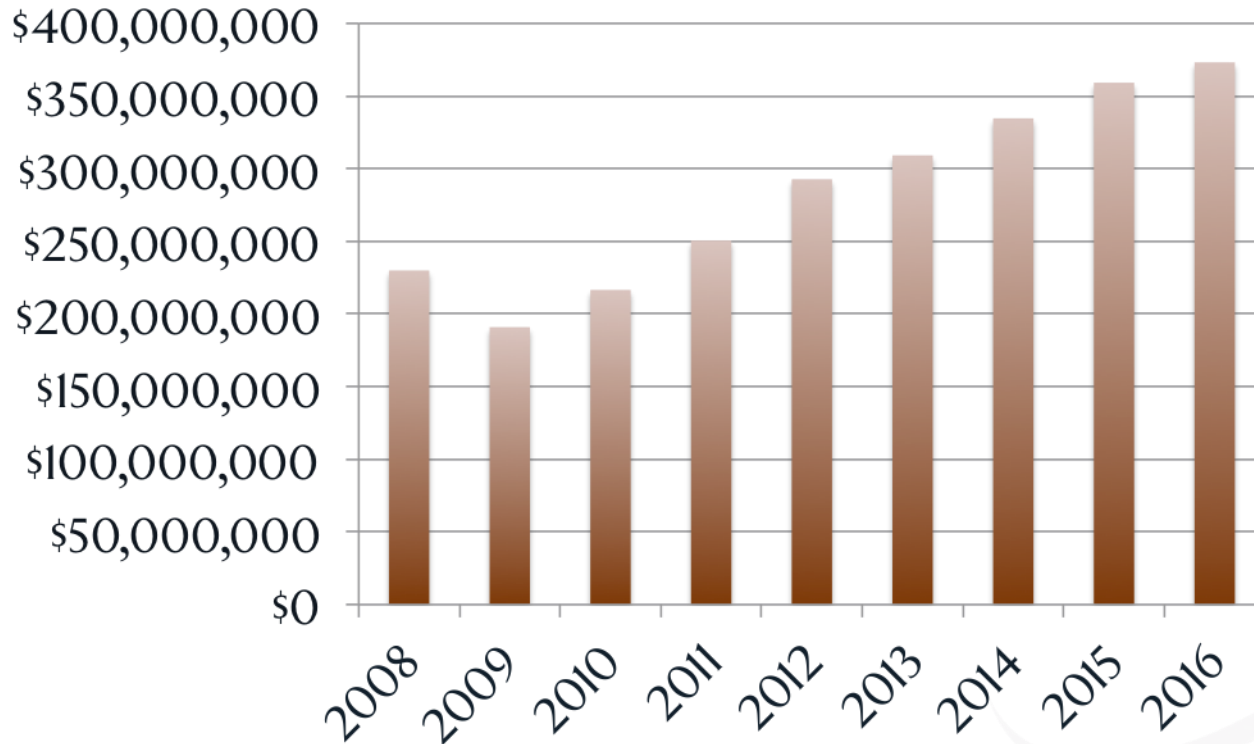
Smith Travel Research (STR) data from July 2015 through June 2016 shows healthy Napa County growth in all key lodging metrics (80% of rooms reporting).

# TOT Collected by Jurisdiction

## July 1, 2015 - June 30, 2016

		TOT Collected per Resident
Calistoga	\$5,652,939	\$938.09
St. Helena	\$1,978,546	\$279.24
Yountville	\$6,808,531	\$2,205.15
Napa	\$18,086,126	\$196.43
American Canyon	\$1,510,528	\$68.11
Unincorporated County	\$13,277,569	\$442.53
TOTAL	\$47,314,239	

# NAPA COUNTY LODGING REVENUE





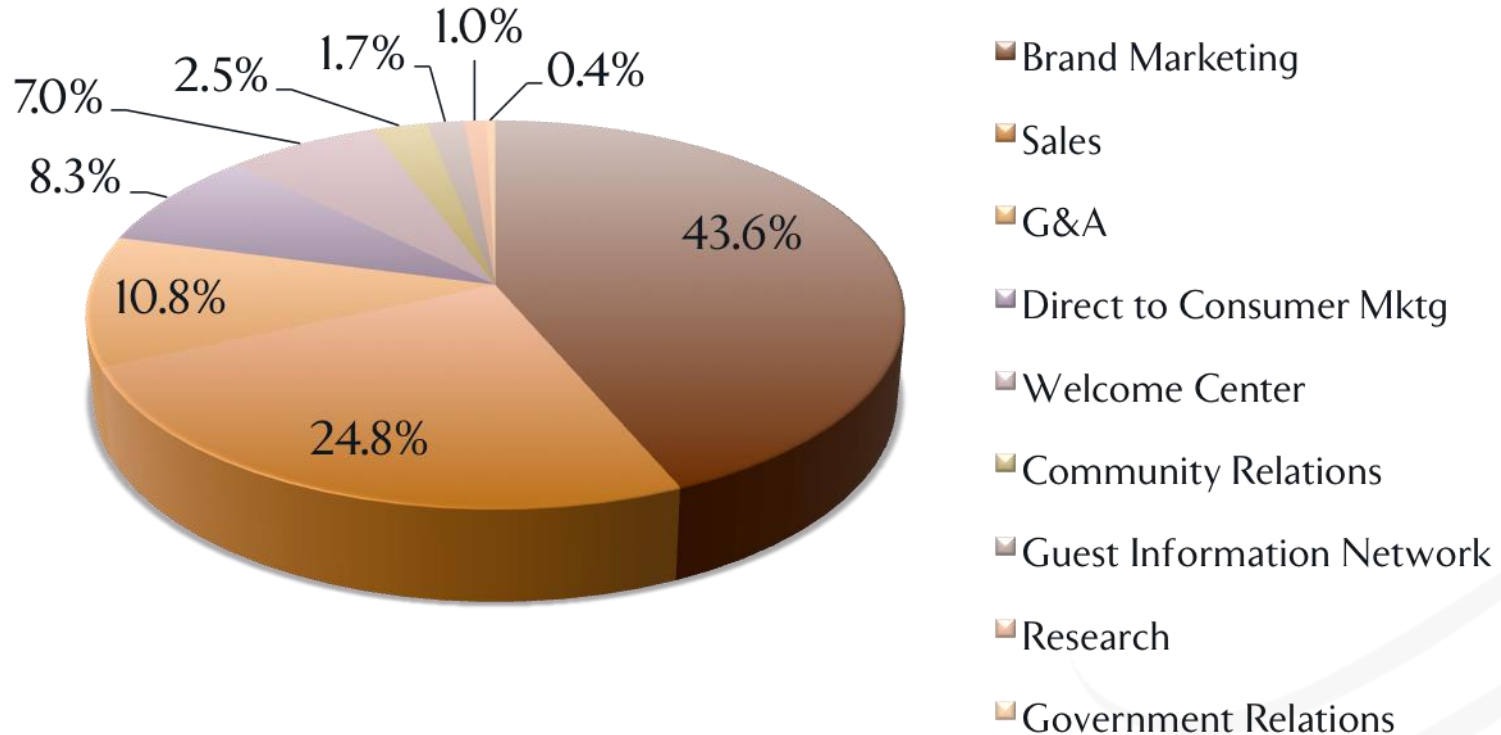


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**BUDGET**

# FY 2016 ACTUAL

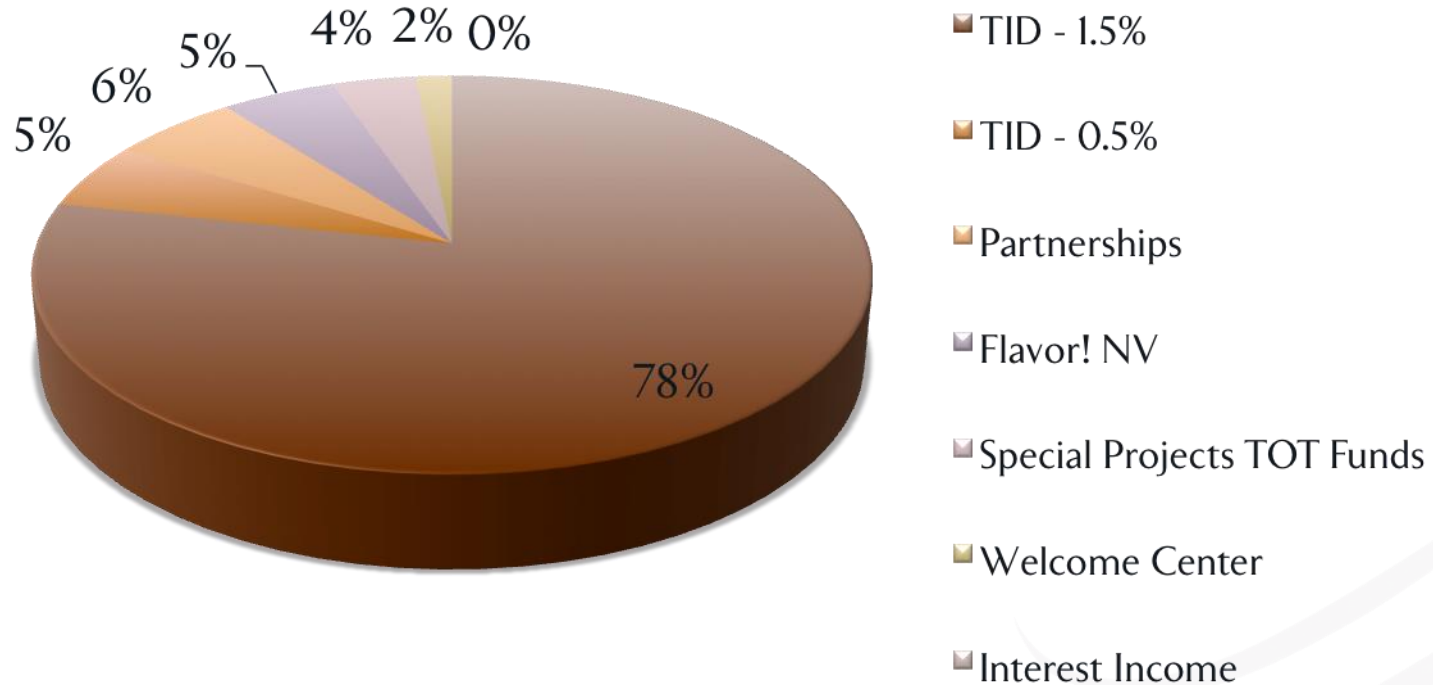
Total Expenses = \$6,970,379






# FY 2016 REVENUE

Total Revenue = \$7,215,957





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# MARKETING & COMMUNICATIONS

# MARKETING GOALS FY16

## Strategic Approach with MeringCarson

- Research, Brand Development and Programming Assessment
- Brand Platform / Messaging Strategy Development
- Communications and Connections / Media Planning
- *Legend Has It* Campaign Expansion

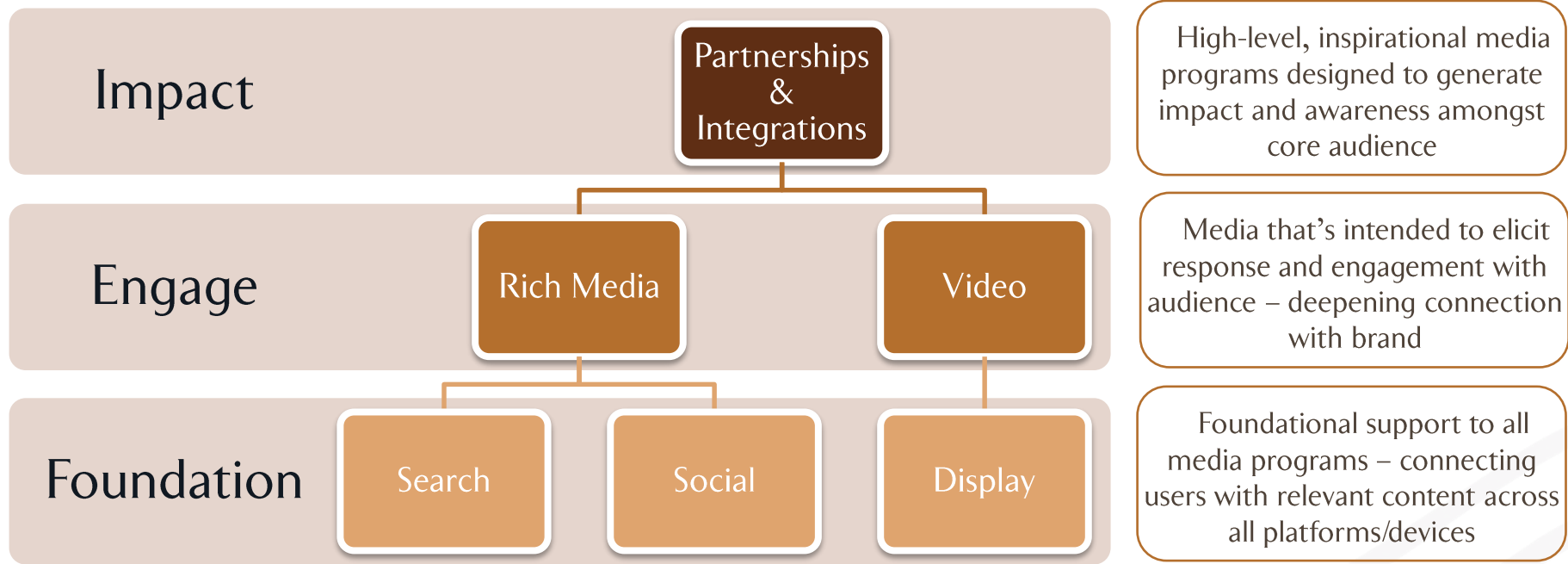




# OBJECTIVE

Implement a multi-channel paid advertising plan to establish the Legendary Napa Valley brand and increase room nights mid-week and during need periods.

# MEDIA PLAN FRAMEWORK







# FY16 MEDIA RELATIONS

The Super Bowl and 40th Anniversary of the Judgment of Paris drove additional opportunities for global journalists to cover the Napa Valley, and continues to attract A-list media coverage.

	July 2015-June 2016	% growth
Press Releases	59	+90%
Impressions	1.6 Billion	+91%
Hosted Press	213	+96%

# A HIGHLIGHT OF VISITING JOURNALISTS

## International

- *Etihad* (Abu Dhabi)
- *Jet Airways* (India)
- *Globe & Mail* (Canada)
- *The Daily Telegraph* (UK)
- *Travel + Leisure* (China)
- *Volaris* (Mexico)
- *Out There* (UK)
- *Canadian World Traveler* (Canada)

## Domestic

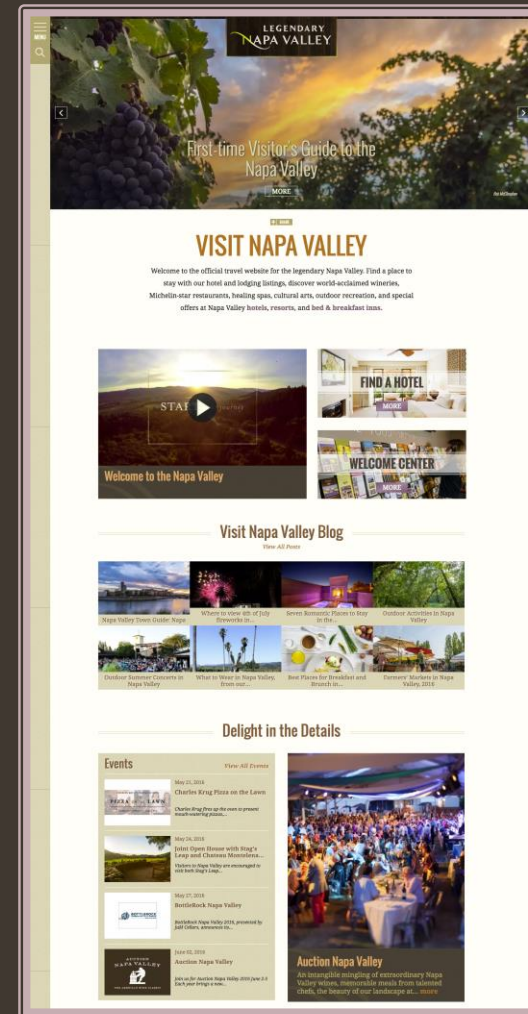
- *USA Today*
- *Forbes.com*
- *Rhapsody*
- *Sharp Magazine*
- *NY Daily News*
- *Fodor's*
- *Out Traveler*
- *Time Out SF*
- *Black Enterprise*

# VISITNAPAVALLEY.COM

The numbers...

July15 – June16 % Growth		
Unique Visitors	1,086,106	+8.06%
Visits (Sessions)	1,442,855	+8.50%

*Website redesign launched May 18, 2016*

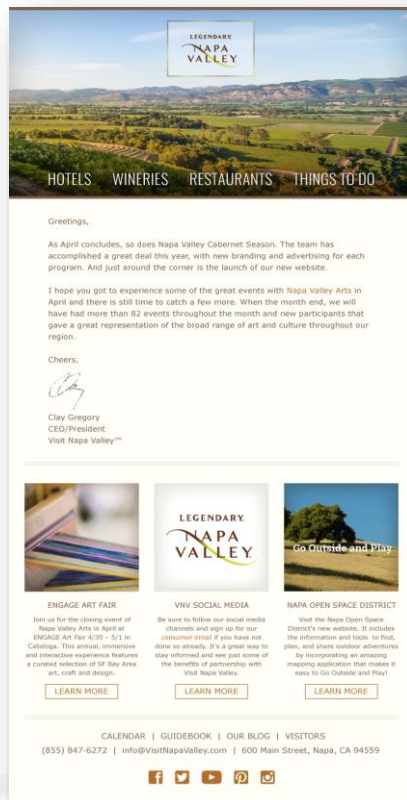
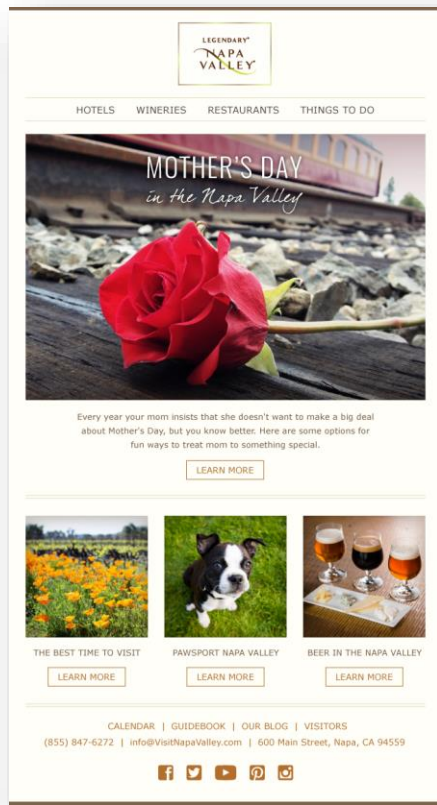


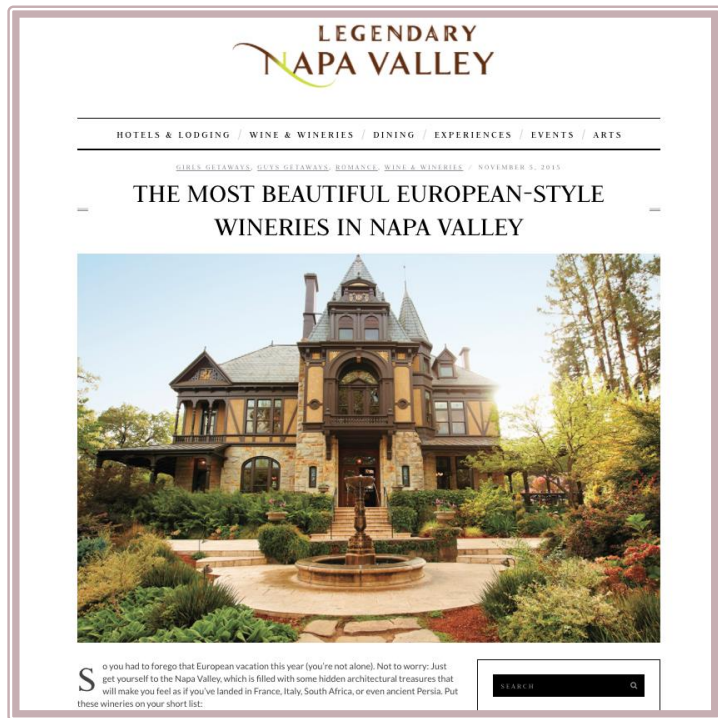


# EMAIL MARKETING

Refined B2C and B2B in conjunction with the website re-launch.

- Mobile-friendly
  - 62% view on mobile
- Redesign CTR showed 23% increase
- Subscribers have increase 17% YOY, with 65,000+





# BLOG & SOCIAL MEDIA

## #VisitNapaValley

### The Napa Valley Blog

- 86 articles published
- 300K unique visitors (155% increase)

### Social Media

- Facebook: 123K followers up 39% YOY
- Twitter: 22K followers up 32% YOY
- Instagram: 31K up 206% YOY

# RESTAURANT WEEK

January 24-31, 2016

30 Restaurant participants offered \$20 lunch and/or dinner for \$36 or \$46

- 3.4 million paid media impressions
- 70 million earned media impressions – 40% increase YOY
- 44K Facebook and 1,500 Blog Impressions
- January website traffic was up 4.4%; RW landing page 25K unique visitors



**FIND YOUR PERFECT PAIRING**

There's no better time to experience the Napa Valley's legendary culinary culture than Restaurant Week. Enjoy prix-fixe menus all week long at the Valley's freshest and finest restaurants.

**JANUARY 24-31 2016**

Visit [NapaValley.com/RestaurantWeek](http://NapaValley.com/RestaurantWeek)

**RESTAURANT WEEK**  
NAPA VALLEY

Angelo Restaurant • Anselmo • Auberge du Soleil • BANK Cafe and Bar • Bar Terra • Beehive Cafe • Booker's Trattoria • Capra Cien • El Dorado • Farmstead at Long Meadow Ranch • Grosse Pointe • Grille 25 • Harvest Table • Hotel Calistoga • Hydra Grill • La Toque Restaurant • Market • Napa General Store • Oenotria • The Marriage Room and Spa • Oenotria • Terra Cafe • 6011 • The Bakery Cafe by Day • The Cellar at Silverado Resort and Spa • The Post Southern Bistro • TORO • Vintner's • Willow Glen • Graystone Restaurant

\*Participating restaurants will denote their logo on the Napa Food Bank.

A promotional poster for the Flavor! Napa Valley festival. The background is a blurred image of a hand holding a spoon, pouring a golden liquid (likely olive oil) over a plate of food. The text is overlaid on this image.

Five Days, Forty Events,  
One Legendary Festival

MARCH 16-20 2016

Celebrate Napa Valley's renowned farm-to-table cuisine and world-class wines with a five-day festival featuring exclusive workshops, demonstrations and indulgent culinary experiences with the Napa Valley's legendary talent.

WINE. DINE. INDULGE.

**Flavor!**  
NAPA VALLEY

Brought to you by  
LEGENDARY NAPA VALLEY

A benefit for  
CLIMATE CENTER NORTHERN CALIFORNIA

Founding sponsor  
SILVERADO  
Kendall & Son

Imperial sponsors  
THE MERITAGE RESORT AND SPA  
DOWNTOWN NAPA

PRESENTED BY  
RELIANT BUSINESS

Get Tickets Now!  
FlavorNapaValley.com

Jeroboom sponsor  
OpenTable

Media sponsor  
Sunset

#FLAVORNAPA

f t y

# FLAVOR! NAPA VALLEY

March 16-20, 2016

Moved from November and brought on new producers – AF&Co and DPEM

- 3,000 total attendees; 36% outside of California
- 163 million in paid and in-kind paid impressions
- 110 million earned media impressions
- 37K unique visitors to FlavorNapaValley.com



# ARTS IN APRIL

## Month of April

In partnership with Arts Council Napa Valley, featured more than 80 events

- 6.6 million paid media impressions
- 26 million earned media impressions
- 5K social media impressions
- 55K website impressions



A photograph of a vineyard at sunset. In the foreground, a large, dark bunch of grapes hangs from a vine, surrounded by green leaves. The background shows a row of grapevines stretching into the distance under a sky with soft, colorful clouds in shades of pink, orange, and blue. The ground is dry and covered with fallen leaves.

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**SALES**





# GROUP SALES ACTIVITIES

Bringing group business to our region

- 4 Sales Missions: New York, Texas, Northern California and Chicago
- 7 Trade Events with San Francisco Travel
- Attendance in domestic and international trade shows
- More than 20 industry events

# SALES TEAM ACCOMPLISHMENTS

## Far exceeded our goals

- Grew database by more than 5,500 contacts
- Direct lead volume +29%
- Cvent leads +55%
- Booked leads +64%





# TRAVEL TRADE

## International focus on mature travel markets

- Focus: United Kingdom, Australia/New Zealand, and Canada and added representation in Scandinavia
- Emerging markets: China and Brazil
- FY16 Activities:
  - 3 International Sales Missions
  - 8 Tradeshows
  - 4 Events
  - 8 Trainings
  - Hosted 14 FAM visits from eight countries



# SPONSORSHIPS



# SUPER BOWL 50

## In partnership with the Napa Valley Vintners

- Napa Valley wine region was named a “Destination Partner” by the Super Bowl 50 Host Committee
- VNV and NVV hosted a series of invitation-only, high profile events that featured Napa Valley wines
- Many Napa Valley businesses created unique “Super Bowl 50” experiences to drive visitation



# GREAT WINE CAPITALS

In partnership with San Francisco Travel

- VNV participated in the annual meeting in Bilbao, Spain
- The long-term benefit: the collaboration and learning from other top wine tourism regions, as well the honor of representing North American in the Great Wine Capitals







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# COMMUNITY & GOVERNMENT AFFAIRS

# INDUSTRY & GOVERNMENT RELATIONS

## Outreach • Advocacy • Engagement

- ✓ NVTa Citizen Advisory Committee
- ✓ Hospitality Industry Partnership
- ✓ Housing Committees
- ✓ Disaster Preparedness Coalition
- ✓ Transportation
- ✓ Recruitment
- ✓ Housing and Land Use
- ✓ Elected Official and Stakeholder Outreach
- ✓ Tourism Education

# COMMUNITY RELATIONS

## Outreach • Advocacy • Engagement

- ✓ Leadership Napa Valley Board of Directors
- ✓ Napa Valley Vine Trail Board of Directors
- ✓ Adopt a School Steering Committee
- ✓ Clear Air Coalition Steering Committee
- ✓ Commuter Survey and Transit Programs
- ✓ Recruitment/Opportunity Fair
- ✓ Idle Free Outreach/Training
- ✓ Public Arts – Vine Trail
- ✓ Visitor Survey Data
- ✓ Tourism Toolkit



The logo for the Napa Valley Welcome Center is centered in the upper portion of the image. It consists of the word "LEGENDARY" in a small, all-caps, sans-serif font. Below it, the words "NAPA VALLEY" are written in a larger, all-caps, serif font. A thin, curved line, resembling a vine or a stylized 'V', arches over the word "VALLEY". The entire logo is enclosed within a thin, light-colored rectangular border.

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A large, horizontal banner with a light beige background and a thin green border is positioned in the center of the image. It contains the text "NAPA VALLEY WELCOME CENTER" in a bold, black, sans-serif font. The banner is superimposed over a scenic background of rolling hills and vineyards.

# **NAPA VALLEY WELCOME CENTER**



# FY16 WELCOME CENTER ACTIVITIES

## The starting point for guests to our region

- Six staff and 81 volunteer ambassadors at the Napa Valley Welcome Center
- Served 139,367 guests
- Collected consumer data from 15,067 visitors
- The Lodging Desk booked 1,086 room nights generating revenue of \$265,288.25
- Maintain a close partnership with other official visitor centers in the County, known as the Guest Information Network, to ensure a consistent guest experience



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# RESEARCH & MARKET INTELLIGENCE

# 2016 RESEARCH

## Visitor Profile Study and Economic Impact Report

Visit Napa Valley contracted with Destination Analysts to conduct the 2016 Visitor Profile Survey and Economic Impact of Tourism report.

These reports will be completed and published in Spring 2017 and will be available to the public on Visit Napa Valley's website.

Three light gray, wavy, curved lines are positioned in the bottom right corner of the page, adding a decorative element to the layout.





**THANK YOU**