

BOS  
12/15/2015  
Item 9K



# LEGENDARY NAPA VALLEY

Visit Napa Valley  
2015 Year-End Report  
&  
2016 Overview

# Agenda

- Visit Napa Valley Mission and Key Objectives
- Lodging Metrics and Revenue - STR data
- 2005 vs. 2014 Tourism Data
- 2016 Budget Overview
- Key Recent Accomplishments
  - Sales Program Highlights
  - Brand Marketing Program Highlights
  - Media Relations, Social Media, Website
  - Napa Valley Welcome Center
  - Super Bowl 50
- Visitor Profile and Economic Impact of Tourism studies
- Tourism Matters



### **Who We Are**

The official tourism marketing organization for The Napa Valley.

### **Our Mission**

Our mission is to promote, protect, and enhance the Napa Valley's position as America's premier wine, food, arts, and wellness destination.

# VNV's Key Objectives

1. Build demand by effectively marketing legendary Napa Valley destination experiences to consumers through targeted domestic and international media and Leisure and Group markets
2. Support the delivery of consistent destination information and legendary guest services to our guests
3. Drive targeted growth and support visitor management through marketing programs that promote "off peak" seasonal and Sunday through Thursday travel patterns

The Napa Valley Experience

LUXURY/  
ULTRA-LUXURY

CORE TRAVELER

MEETING & EVENT  
PLANNERS

# Napa Valley Pillars



# Lodging Metrics - STR data

	12-Months Ending June 2015*	% Change
Occupancy	69.9%	+1.5%
ADR	\$283.16	+5.4%
RevPAR	\$197.92	+8.0%
Revenue	\$334.6m	+8.0%

\*Reporting: 80.8% of total rooms

Napa had a stellar performance in occupancy, average daily rate (ADR), RevPar and Revenue, due in part to VNV marketing efforts leading to increased midweek occupancy and higher occupancy levels

# Napa County Lodging Revenue +75%

Year	Total Revenue	% Change
2014	\$334,600,000	+7.9%
2013	\$309,122,518	+5.6%
2012	\$292,687,633	+16.9%
2011	\$250,472,805	+15.7%
2010	\$216,565,148	+13.4
2009	\$190,905,262	-17%
2008	\$229,904,699	+7.6%

# Napa County FY14 TOT \$ and % of Budget by Jurisdiction

<u>Jurisdiction</u>	<u>FY14 TOT Revenue</u>	<u>% of Jurisdiction Budget</u>
Yountville	\$6,261,476.00	66%
Calistoga	\$4,456,446.00	49%
City of Napa	\$15,129,048.00	20%
Unincorporated County	\$10,543,464	7%
St. Helena	\$1,729,887.00	10%
American Canyon	\$1,249,159.00	8%



# 2005 vs. 2014 TOURISM DATA\*

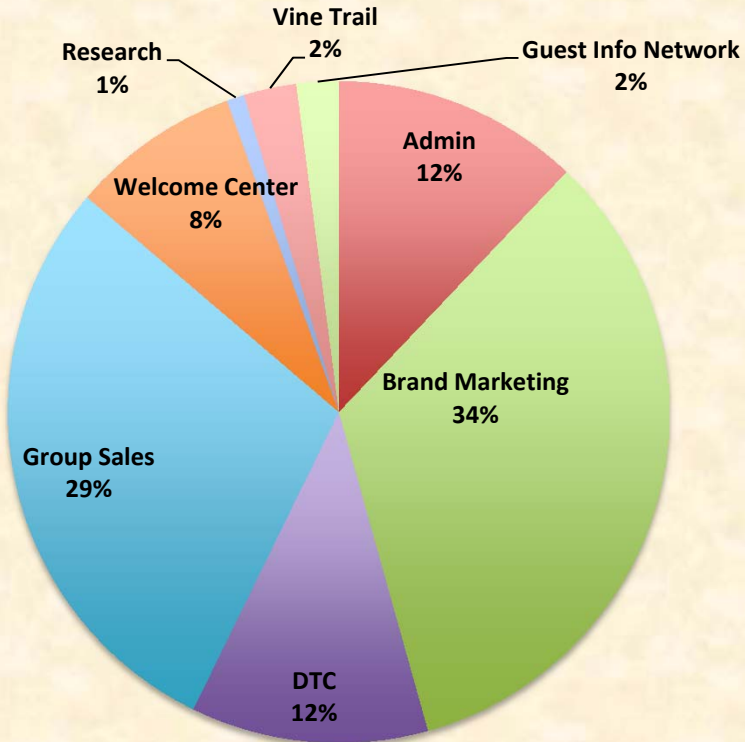
	2005 Results	2014 Results
Visitor Days	4.7 million	5.5 million
Average overnight guest stay	1.91 days	3.0 days
Average daily visitor spending in Napa Valley	\$2.5 Million	\$4.48 Million
Total visitor spending in Napa Valley	<\$1Billion	\$1.6 Billion
TOT collected	<\$20 Million	\$38.6 Million
ADR	\$150.38	\$275.58
Occupancy	67.4%	68.2%
Room Supply	3334 rooms**	4692 rooms**
Average Daily spend per overnight guest per day	\$233.47	\$389.00

\*2005 study by Purdue University, 2014 study by Destination Analysts

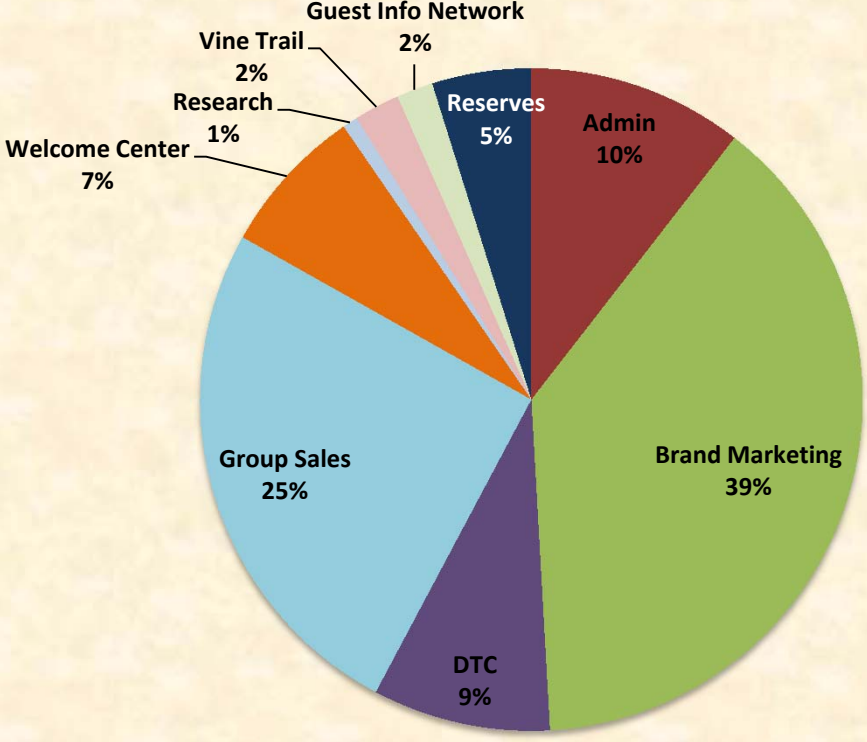
\*\*Data sourced from STR Data

## COMPARISON OF EXPENSES BY DEPARTMENT FY 2015 and FY 2016 Budgets

**VNV Expenses by Department  
FY 2015 Budget  
Total Expenses = \$5,828,962**



**VNV Expenses by Department  
FY 2016 Budget  
Total Expenses = \$6,419,300**





# Key Marketing & Sales Efforts

LEGENDARY  
NAPA VALLEY

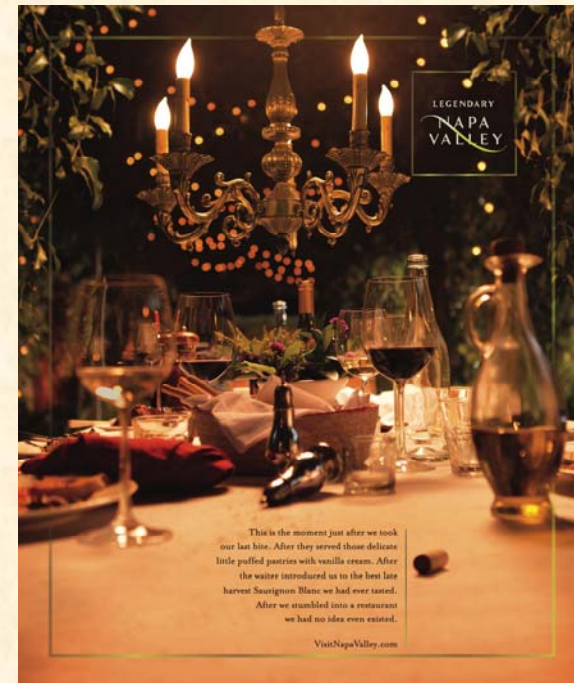
# FY16 SALES STRATEGIES

- Maintain partnerships and nurture relationships to drive qualified leads
- Maintain current level of attendance at trade events to maintain exposure
- Increase focus on international markets to gain a more educated audience
- New partnership with luxury travel network to gain market awareness
- Marketing plan with Cvent, eMarketing and wedding segment to maintain and add exposure



# FY16 SALES GOALS & ACTIVITIES

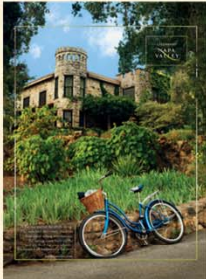
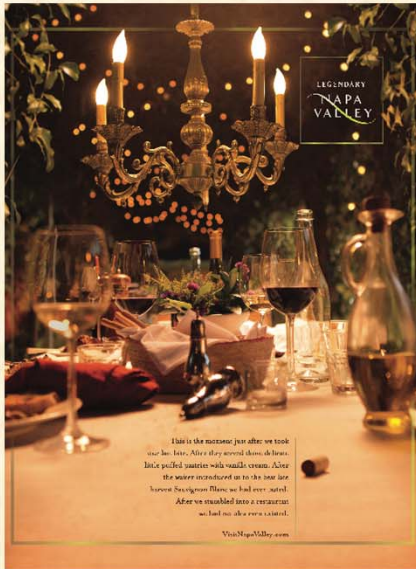
- Increase direct sales leads and booked leads by 110%
- Host 5 domestic and attend 5 international sales missions
- Renew partnerships with travel trade representation in UK and Australia and new agreement with Scandinavian countries
- Attend Virtuoso travel week
- Maintain partnerships with HelmsBriscoe, Cvent, MPI and San Francisco Travel
- Increase familiarization trips to 18
- Marketing plan to include added exposure with Cvent, eMarketing and wedding market segment advertising



# FY16 MARKETING INITIATIVES

- Build on our brand campaign & assets
- Refine Cabernet Season support & VNV signature programs
- Expand Media Relations & Social Media
- Redesign VisitNapaValley.com
- Super Bowl 50: Host Committee sponsorship

# BRAND LOOK



# BROADER MEDIA PROGRAM



- Continuing to run & build more assets
  - Luxury magazines, digital, trade events
  - Year 2 optimized program
  - New agency support with Mering Carson



# NEW COLLATERAL

**WELLNESS**  
Natural geothermal mud baths are the established, regional wellness destination.

Hiking, biking, ballooning, and wine tasting are abundant activities that draw visitors to the valley's natural beauty.

There is something for each and every guest.

Located inside the Welcome Center, Mercantile offers a large selection of local and artisan products for guests to enjoy.

**NAPA VALLEY CABERNET SEASON**

During mid-fall to early spring the pace is set a bit slower, providing visitors with the opportunity to appreciate the finer details. Like a fine wine, the Valley shouldn't be rushed; it's a place to take your time, relax, restore and reconnect. Join us for Cabernet Season and experience all the Napa Valley has to offer.

**LEGENDARY NAPA VALLEY HOLIDAYS**  
*November-December*

'Tis the season for the Napa Valley's warm and welcoming communities to offer hometown holiday experiences with exceptional wines, small-town charm and world-class shopping.

**WHY TOURISM MATTERS**

Tourism is a vibrant and growing industry in the Napa Valley, supporting an estimated 11,776 local jobs. In 2012, the visitor industry generated \$64.2 million in tax revenue and \$1.63 billion in total visitor spending inside the county.

In 2014, the Napa Valley welcomed a total of 3.3 million visitors, a 12 percent increase from 2012. Prior to arriving to the Napa Valley, 25 percent of these visitors used VisitNapaValley.com to plan their trip, making it the number one pre-trip planning tool used by visitors to the valley.

Visit Napa Valley is the official tourism marketing organization for the Napa Valley.

**MISSION STATEMENT**  
*To protect, promote and enhance The Napa Valley's position as America's premier wine, food, arts and wellness destination.*

**PARTNERSHIP WITH VISIT NAPA VALLEY**

Visit Napa Valley (VNV) is dedicated to delivering valued benefits to our partners. We have carefully designed a range of partnership levels to suit a variety of businesses. We help our partners gain public visibility, develop relationships with media, engage new audiences, build online traffic and provide business leads.

**See what VNV can do for your business:**

- Our sales team books over 6k group rooms annually.
- Our international tourism development team brings over 150 travel operators/agents annually.
- Our PR team brings over 40 journalists to the Napa Valley annually.
- Our marketing team executes successful consumer programs throughout the year that highlight the region and our partners.
- Our Welcome Center assists over 150K guests annually.
- Our website averages 100k unique visitors a month.

If you are interested in learning more about partnership benefits and levels please reach out to [partnership@visitsnapavalley.com](mailto:partnership@visitsnapavalley.com)

**Napa Valley WELCOME CENTERS**

**Napa Valley Welcome Center**  
600 Main Street,  
Napa, CA 94559  
(907) 251-5895 OR  
(855) 847-6272 (toll-free)

Lodging assistance:  
(907) 251-9188 OR  
(855) 333-6272 (toll-free)

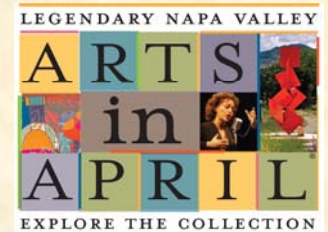
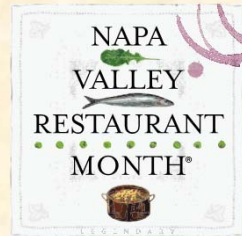
**American Canyon Chamber of Commerce & Welcome Center**  
3860 Broadway, Suite 103  
American Canyon, CA 94503  
(707) 552-3650

**Yountville Chamber of Commerce & Welcome Center**  
6484 Washington Street, Suite F  
Yountville, CA 94559  
(707) 944-0904

**St. Helena Chamber of Commerce & Welcome Center**  
657 Main Street,  
St. Helena CA, 94574  
(707) 963-4456

**Calistoga Chamber of Commerce & Welcome Center**  
1133 Washington Street,  
Calistoga, CA 94515  
(707) 942-6333

# CABERNET SEASON NEW LOOK



mid Fall to early Spring



January



March



April

# CABERNET SEASON NEW COPY

“Cabernet Season in the Napa Valley welcomes mild temperatures and heartier meals—the perfect pairing for a bold Cabernet Sauvignon. During mid Fall to early Spring the pace is set a bit slower, providing visitors with the opportunity to appreciate the finer details. It’s a time to book an entire spa day; have the opportunity to meet the winemaker; linger after each delicious meal; sleep in; and do it all over again. Like a fine wine, the valley shouldn’t be rushed; it’s a place to take your time, relax, restore and reconnect.

Join us for Cabernet Season and experience all the Napa Valley has to offer.”

# RESTAURANT WEEK

- January 24-31, 2016
- Fixed Price Menus:
  - Lunch - \$20 for minimum of 2 courses
  - Dinner - \$36 or \$46 for minimum of 3 courses
- Tied in with Tourism Matters Napa County mailing in early January
- Charitable component – corkage fees benefit the Napa Food Bank



# FLAVOR! NAPA VALLEY



- March 16 – 20, 2016 – new season, new look.
- What is new this year?
  - Silverado Resort Celebrity Chef and Vintner Golf Tournament
  - Napa Valley Wine Tours
  - 29 on 29 Lunch Specials
  - Possible After-parties
  - The Grand Tasting has moved from Friday to Saturday

# FLAVOR! NAPA VALEY

## Who is Involved This Year?

- Event Presenter and Founder:  
Visit Napa Valley
- Beneficiary: The Culinary Institute  
of America, Greystone
- Sponsorship and Program  
Development: Andrew Freeman &  
Company
- Concept Design & Event  
Production: Dominic Phillips Event  
Marketing
- Wine Management &  
Programming: Christopher Sawyer

- FlavorNapaValley.com
  - Acquired entire web data base,  
successfully moved it from old  
owner into our possession.
  - Redesigned and launched the site in  
October.
  - 8K unique visitors
- Flavor E-Newsletter
  - Redesigned template and continuing  
production as programming moves  
forward, Spring 2016

# ARTS IN APRIL

- Program has launched with big changes:
  - Arts in April will no longer be divided up by regional weeks. Host an event anytime during the month of April.
  - Approximately 25 Arts in April events will be granted "Spotlight Status" for truly inspired event submissions.
  - All events for Arts in April will be loaded into the CellarPass platform to streamline the user experience of adding any event they would like to attend into one shopping cart.



# VNV STRATEGIC PARTNERS

- Each TID
- Events:
  - Napa Valley Film Festival
  - Napa Truffle Festival
  - CabFest
  - Napa Valley Marathon
  - BottleRock
  - Festival del Sole
- Paid Sponsorships:
  - America's Cup
  - Frys Open
  - Breeders Cup
  - Super Bowl 50
- And of course our paying partners



# MEDIA RELATIONS

The Japan Times

R H A P S O D Y

TRAVELAGE  
WEST



THE SUNDAY TIMES

*North Bay*  
**Business Journal**

NORTH SAN FRANCISCO BAY AREA: SONOMA, NAPA, AND MARIN COUNTIES

July - November, 2015 Stats:

- Press releases: 23
- PR Impressions: 460,249,802

# STELLAR GROWTH: SOCIAL



Facebook: 105,500+

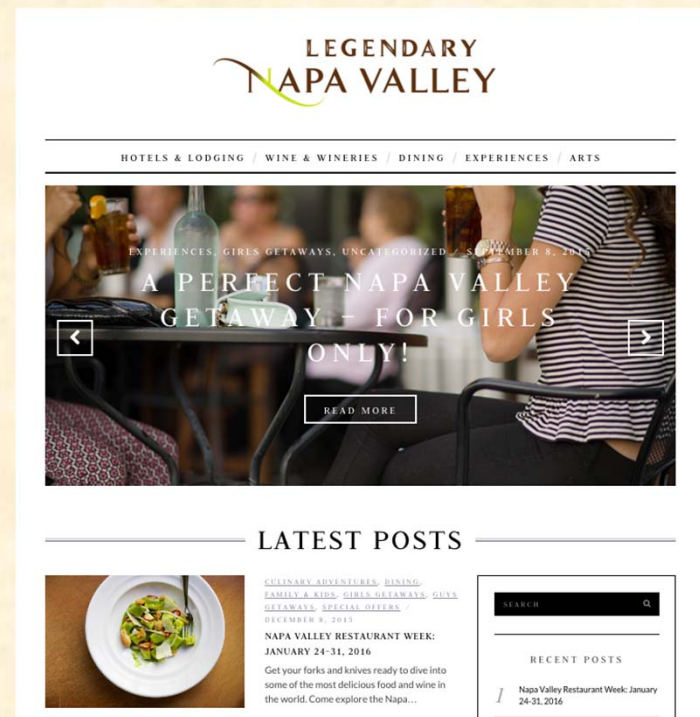
Twitter: 18,500+

Instagram: 17,000+

FB+TW Impressions (Jul-Nov): 8,400,000+

# THE VNV BLOG GROWS

- Steady growth each month
- 2 posts/week: Deep, well researched articles
- Unique Visitors (July – Nov): 116,870
  - +10% in last 6 months



# VISIT NAPA VALLEY.COM

- Website Stats (July – Nov):
  - 498K unique visitors
  - +14% previous year
  - Two new inspiration videos featured
- B2C E-Newsletter:
  - From 56K to 60K subscribers
- Early 2016: Launch redesigned site
  - Immersive, visually compelling, experiential
  - Feature a new Welcome Video



# WEBSITE PREVIEW



11 Napa Valley Wineries for Lovers of White Wine

MORE

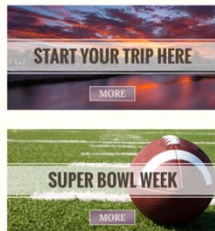
## VISIT NAPA VALLEY

From Lovely to Legendary

Welcome to the official travel website for the legendary Napa Valley. Find a place to stay with our hotel and lodging listings, discover world-acclaimed wineries, Michelin-star restaurants, healing spas, cultural arts, outdoor recreation, and special offers at Napa Valley hotels, resorts, and bed & breakfast inns.



Welcome to the Napa Valley  
Plan your dream getaway, view all Napa Valley videos... more



START YOUR TRIP HERE

MORE

SUPER BOWL WEEK

MORE

### Visit Napa Valley Blog

View All Posts



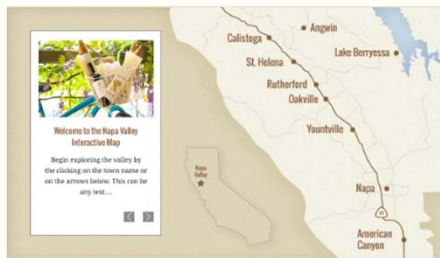
### Delight in the Details

View All Events



#### Cabernet Season

Cabernet Season in the Napa Valley welcomes mild, temperate and bearish meals—the perfect pairing for a bold Cabernet Sauvignon... more



Welcome to the Napa Valley Interactive Map  
Begin exploring the valley by clicking on the town name or on the arrows below. This can be any wine...

### Special Offers

Harvest Inn by Charlie Palmer  
The St. Helena Rendezvous Package includes a luxurious stay in Harvest Inn's intimate guestrooms, which is the ideal way to toast to lasting love...

MORE



### Social Garden

#### Sign Up

Sign me up for Napa Valley news and special offers

Check In Date

Check Out Date

Email Address

SEARCH

#### Book Your Trip

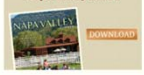
Check In Date

Check Out Date

Property Type

SEARCH

#### Download the Official Napa Valley Guide

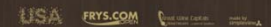


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## LEGENDARY NAPA VALLEY

Napa Valley Welcome Center • 600 Main Street Napa, CA 94959  
Phone (707) 253-5885 or Toll-Free (855) 847-6272

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# NAPA VALLEY WELCOME CENTER



- Visitors Assisted: 68,945
- Guest Data: 7,521
- Room Nights Booked: 545
- Created True Tour (virtual tour) of Welcome Center
- Continue to increase promotion for the Centers across the Valley

# SUPER BOWL 50

- Overview

- Visit Napa Valley & Napa Valley Vintners shared partnership
- A destination partner to the Host Committee for Super Bowl 50, not NFL
- Not exclusive destination



NAPA VALLEY

SUPER BOWL 50 HOST COMMITTEE  
OFFICIAL DESTINATION PARTNER

- Activities

- Special Offers on VNV.com
  - Received 1,267 visitors since mid-July
- Media Pitches: 50 Hours in the Napa Valley, Special Lodging offers, Where to Watch the Game
- Events: Host Committee Thank You Party - Cruise Ship Terminal, Pier 27



# Visitor Profile Study Recap

LEGENDARY  
NAPA VALLEY



# Quick Facts

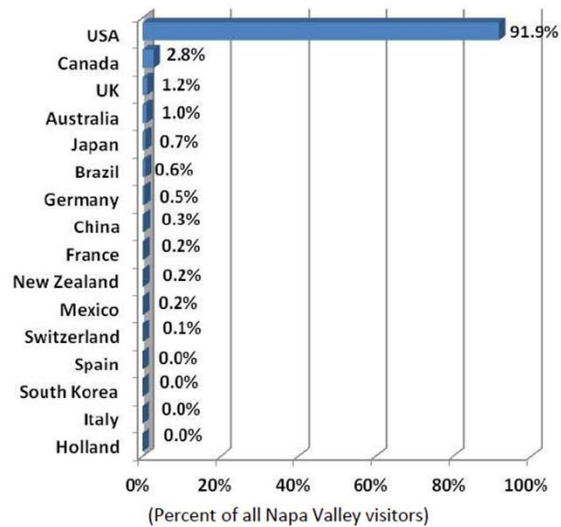
The profile below shows a summary of key economic statistics emerging from this research.

	<b>2012</b>	<b>2014</b>
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

## 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)



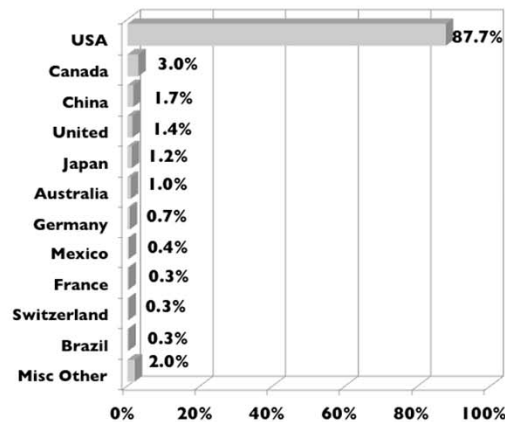
	Lodging Guests	VFR Visitors	Day-trip visitors
USA	93.4%	92.5%	91.3%
Canada	3.1%	2.5%	2.7%
UK	1.3%	0.8%	1.1%
Australia	0.6%	0.0%	1.3%
Japan	0.6%	1.7%	0.7%
Brazil	0.0%	0.0%	1.0%
Germany	0.2%	0.8%	0.6%
China	0.1%	0.8%	0.4%
France	0.2%	0.0%	0.3%
New Zealand	0.1%	0.0%	0.3%
Mexico	0.0%	0.0%	0.3%
Switzerland	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

# 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>

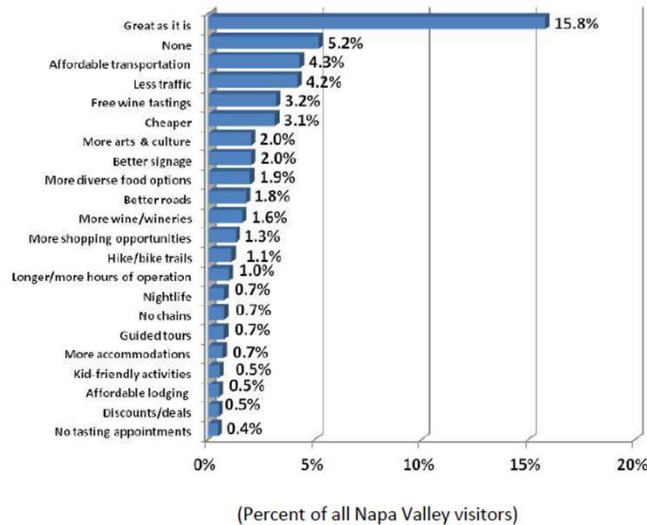
Question: Country of origin

# 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)



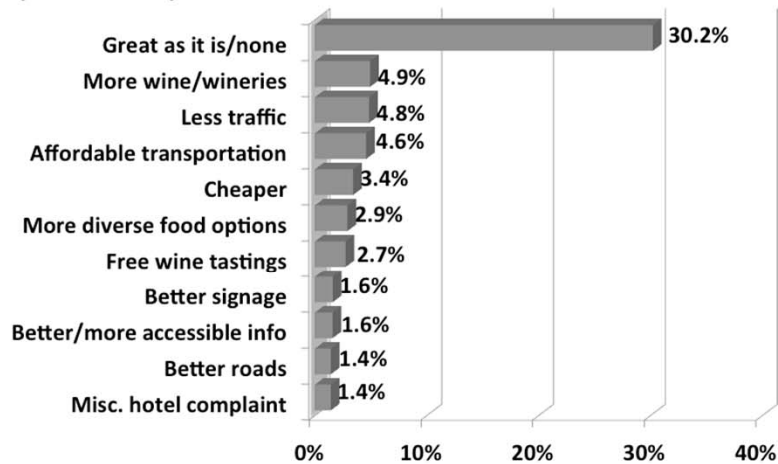
	Lodging Guests	VFR Visitors	Day-trip visitors
Great as it is	7.0%	17.2%	19.6%
None	1.9%	3.3%	6.8%
Affordable transportation	5.4%	4.1%	3.8%
Less traffic	1.4%	4.1%	5.4%
Free wine tastings	1.4%	1.6%	4.1%
Cheaper	3.0%	1.6%	3.2%
More arts & culture	1.2%	9.0%	1.9%
Better signage	0.5%	3.3%	2.6%
More diverse 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?

# 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%
Base	1,848	528	92	1228

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



# INDUSTRY & GOVERNMENT RELATIONS

- Hired Cassandra Walker
  - Lodging participation in addressing current issues:
    - Affordable Housing
    - Living Wage
    - Traffic
    - Vacation Rentals
- Lodging Survey
  - Employers: # of rooms and employees, pay ranges and benefits
  - Employees: Zip code of residency, time, method and duration of commute, reasons for living outside Napa County

# TOURISM MATTERS CAMPAIGN



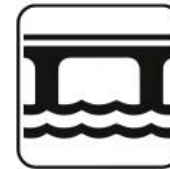
# TOURISM MATTERS CAMPAIGN



Napa River  
Restoration  
\$1.7 Million



Improve 416 miles of  
roads to 70% PCI  
\$9.1 Million



Oak Knoll Cross Rd  
Bridge Replacement  
\$3.7 Million



CAL FIRE  
Operations  
\$8.9 Million



TOT Revenues  
\$12.6 million



6 miles of  
Vine Trail  
\$7 Million





Thank you!

LEGENDARY  
NAPA VALLEY