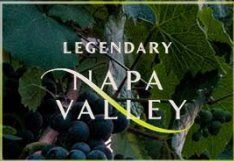




STRATEGICALLY MANAGED TOURISM
IN THE LEGENDARY NAPA VALLEY
NAFCU CONFERENCE
APRIL 19, 2018



ORGANIZATION MISSION &
STRATEGIC INITIATIVES



The official tourism marketing organization for the Napa Valley

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

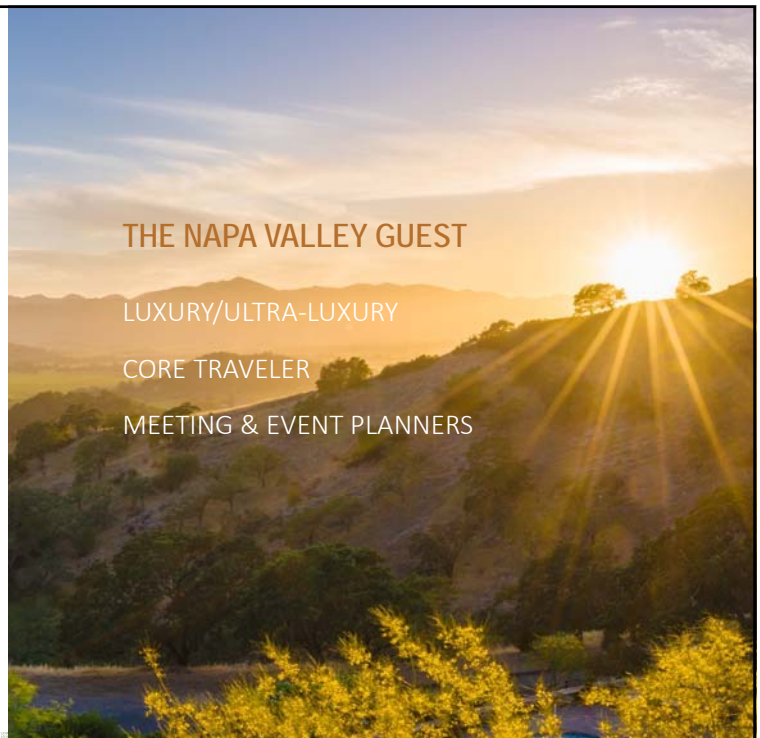


VNV'S KEY OBJECTIVES

Build demand by effectively marketing legendary Napa Valley destination experiences to consumers through targeted domestic and international media and Leisure and Group markets.

Support the delivery of consistent destination information and legendary guest services to our guests.

Drive targeted growth and support visitor management through marketing programs that promote "off peak" seasonal and Sunday through Thursday travel patterns.



THE NAPA VALLEY GUEST

LUXURY/ULTRA-LUXURY

CORE TRAVELER

MEETING & EVENT PLANNERS



VNV LONG RANGE PLAN

2017-2019

A. Drive Brand Preference for Napa Valley

- Create Brand Distinction
- Grow Consumer Engagement and Loyalty
- Increase Consideration for Meeting and Travel Industry

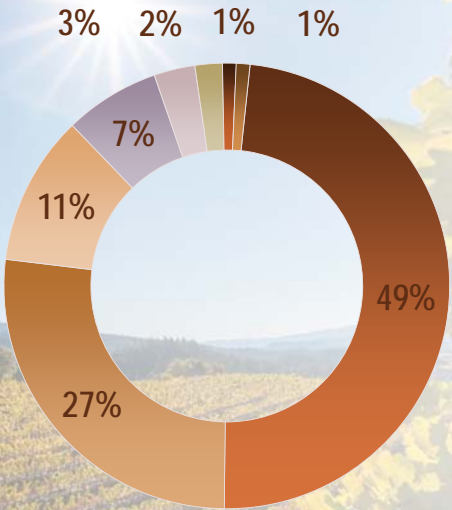
B. Position Visit Napa Valley as an Enduring Tourism Authority

- Advocate for Issues Central to our Mission's Success – Government and Community Relations
- Advance a Culture of Excellence
- Engage and Grow Partner Base

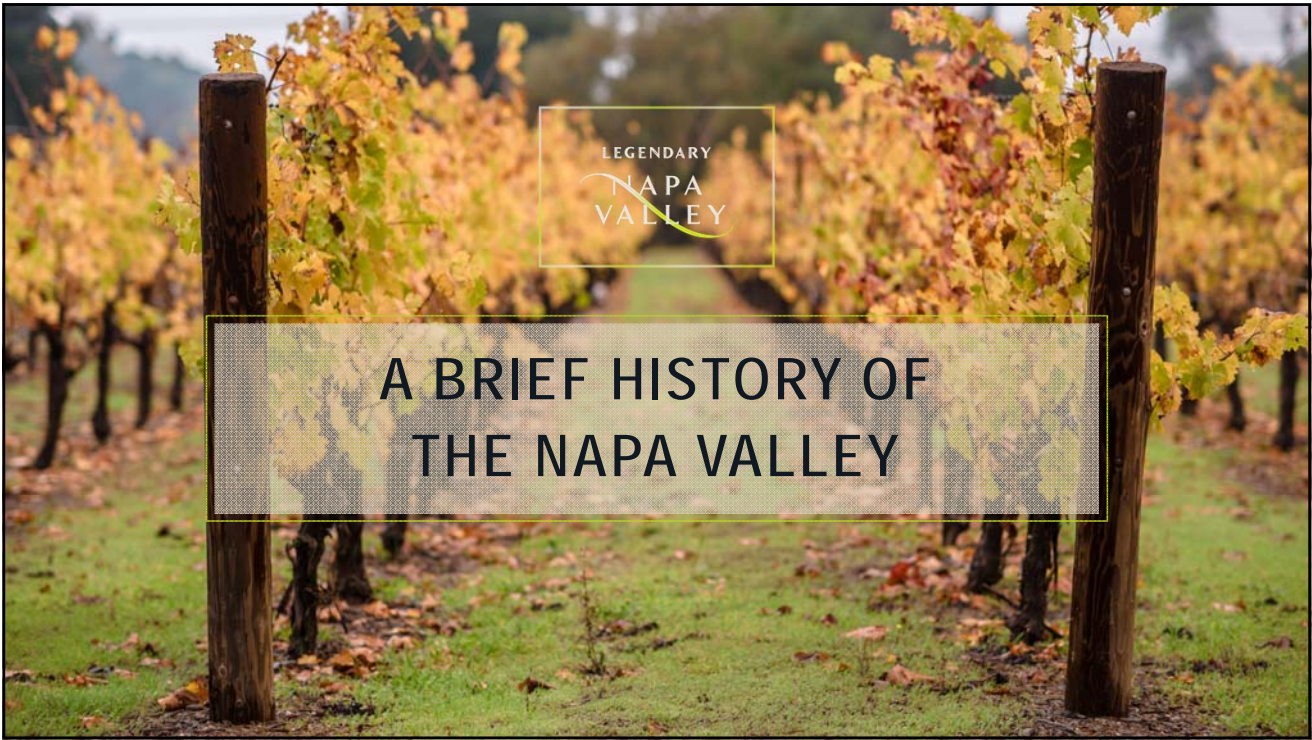


FY 2018 BUDGET

Total Expenses = \$7,223,945




- Brand Marketing
- Sales
- G&A
- Welcome Center
- Community Relations
- Guest Information Network
- Research
- Government Relations



LEGENDARY
NAPA
VALLEY

A BRIEF HISTORY OF THE NAPA VALLEY

1968 NAPA VALLEY AGRICULTURAL PRESERVE FOUNDED – FIRST IN THE U.S.



Triggered by projections that the City of Napa would grow to half a million people by 2020, the Napa Valley Agricultural Preserve is established.

1910 1920 1930 1940 1950 1960 1970 1980

NAPA VALLEY AGRICULTURAL PRESERVE HIGHEST & BEST USE OF THE LAND



Napa Valley, 1940



Santa Clara Valley, 1940

NAPA VALLEY AGRICULTURAL PRESERVE PROTECTS ROUGHLY 38,000 ACRES OF FARMLAND



Napa Valley, 2005



Santa Clara Valley, 2005

1976 JUDGMENT OF PARIS PUTS NAPA VALLEY ON THE GLOBAL STAGE



Napa Valley Chardonnay and Cabernet Sauvignon win blind tasting

1910

1920

1930

1940

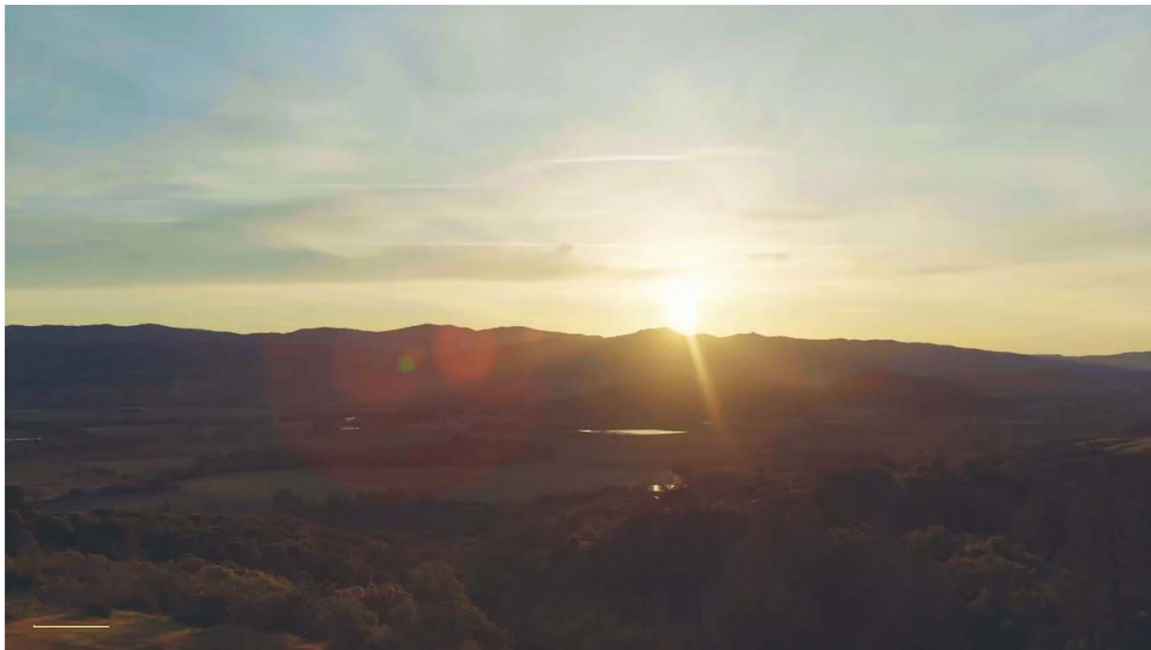
1950

1960

1970

1980

NAPA VALLEY WELCOME VIDEO





AMERICAN CANYON

At the southern tip of the Napa Valley you'll find the town of American Canyon.

Golf courses, wetlands and open space nature preserves appeal to the active traveler.

It's also a great home base for exploring the Carneros wine-growing region.





CITY OF NAPA

Located right on the Napa River, the city of Napa is perfect for a night, or three, on the town.

You'll find art walks, delicious food, tasting rooms, lively events and two performing arts centers, all within close proximity to any adventure you seek.



YOUNTVILLE

Yountville considers itself the culinary capital of the Napa Valley.

Famous restaurateurs and Michelin star chefs reside here, but even the casual dining will tantalize your taste buds.

And don't forget to look up in the early morning hours for the hot air balloon filled skies.





ST. HELENA

In the charming town of St. Helena, the main streets are lined with elegant shops filled with unique clothes, jewelry and décor.

Spend an afternoon perusing some of the many art galleries or make your own artistic interpretation by blending a personal bottle of wine.



CALISTOGA

Laid-back Calistoga is famous for its authentic spas, geothermal springs and volcanic ash mud baths.

Whether you're unwinding with a massage, taking the family on a stunning hike or riding a gondola, this serene atmosphere makes for the perfect escape.





JUST AN HOUR NORTH OF THE GOLDEN GATE

There are four international airports that provide easy access to the Napa Valley:

Oakland	(50 miles)
San Francisco	(57 miles)
Sacramento	(64 miles)
San Jose	(82 miles)

NAPA VALLEY VITICULTURE AREA

California's world-class wine growing region.

There are approximately 475 physical wineries in Napa County producing more than 1,000 different wine brands

95% of the wineries are family owned

- 16 Sub-AVAs within the Napa Valley AVA





SMALL IN SIZE, BIG IN QUALITY AND DIVERSITY

Only 4% of California's wine grapes come from Napa Valley.

Only 9% of Napa County's 504,450 acres (204,000 hectares) are planted to grapes

Only 2% of the world has the Mediterranean climate that exists in the Napa Valley.



ECONOMIC IMPACT

Local Wine Industry and Related Businesses:

Provide an Annual Economic Impact of more than **\$13 billion** locally and more than **\$50 billion** in the U.S.

Create **46,000 jobs** in Napa County and **303,000** nationwide.



NAPA VALLEY CULINARY CAPITAL

The Napa Valley is an epicurean's destination

Most Michelin Stars per capita, including
two 3-star restaurants

150 restaurants and growing

Culinary Tourism:

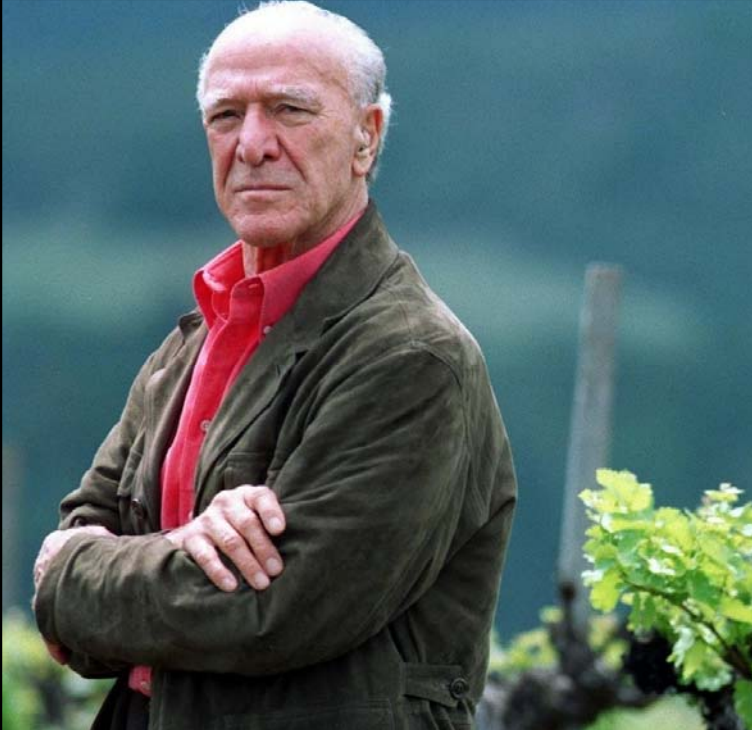
- The Culinary Institute of America
- Cooking classes
- Olive oil tastings
- The Wine Train
- Oxbow Public Market
- COPIA



ARTS & CULTURE

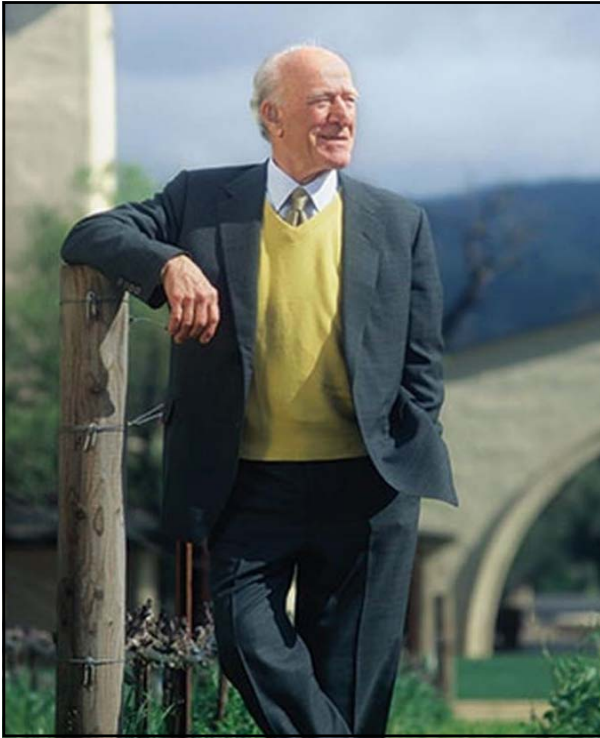


WELLNESS & ACTIVE TOURISM



THE
RISING
TIDE
LIFTS ALL
BOATS

ROBERT MONDAVI



PHILANTHROPIC FOUNDER OF MODERN WINE TOURISM

“Wine, California Wine, Napa Valley Wine...
Robert Mondavi Wine”

Shared Equipment and Knowledge
with Competitors

Loaned \$\$ to Competitors

Served other Vintners’ Wines at
RMW and elsewhere

Lifted Napa Valley Vintners to
Highest Possible Level –
Extraordinary Global Ambassador

Founded Auction Napa Valley with
wife Margrit Biever Mondavi



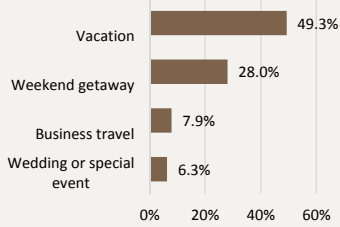
2016 NAPA VALLEY VISITOR PROFILE AND ECONOMIC IMPACT SUMMARY

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

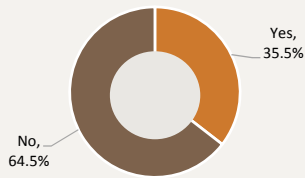
Destination  Analysts

QUICK FACTS

TOP REASONS FOR VISITING



Overnight Stay in Napa Valley



TOP ACTIVITIES



Number of Wineries Visited



KEY TRIP DETAILS

- The average visitor spends **2.7 days** in the Napa Valley
- On average, visitors spend **\$547.72** in-market, per travel party, per day
- The average visiting travel party consist of **4.0 people**

Domestic vs. International Visitors



Visit Napa Valley – Napa Valley Visitor Profile 2016 – Final Report of Findings

Destination Analysts
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THE LODGING GUEST



HOTEL STAY DETAILS

\$265 AVERAGE HOTEL SPEND DAILY

2.3 AVERAGE NO. OF PEOPLE IN ROOM

LENGTH OF STAY

3.0 DAYS SPENT IN THE NAPA VALLEY

WINERIES/TASTING ROOMS VISITED

3.5 AVERAGE

IN-MARKET SPENDING

\$840 AVERAGE PER PARTY, PER DAY

KEY DEMOGRAPHICS

\$192K AVERAGE ANNUAL HOUSEHOLD INCOME

49.8 AVERAGE AGE

LIKELIHOOD TO VISIT AGAIN

68.9% VERY LIKELY

59.9% MARRIED

31.4% SINGLE

TOP ACTIVITIES PARTICIPATED IN

64.7% DINING IN RESTAURANTS












55.3% WINE TASTING ROOMS AT WINERIES

39.1% SHOPPING

29.8% WINERY TOURS

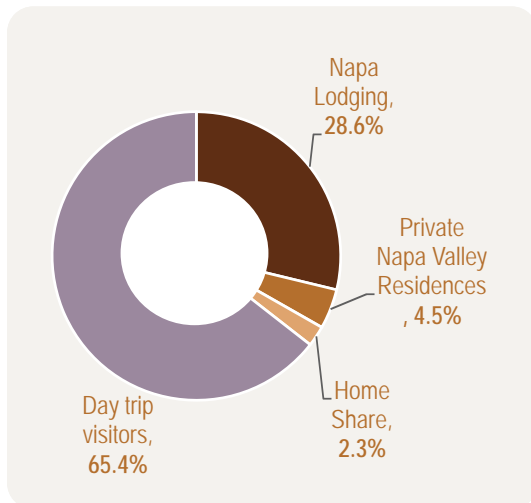
Source: Visit Napa Valley, Napa Valley Visitor Profile 2016 – Final Report of Findings

THE DAY TRIP GUEST

 TOP CITIES VISITORS MADE DAY TRIP FROM	42.0% SAN FRANCISCO	KEY DEMOGRAPHICS	 \$149K AVERAGE ANNUAL HOUSEHOLD INCOME	 54.4% MARRIED	
	8.0% OAKLAND		 40.3 AVERAGE AGE	 36.0% SINGLE	
	6.4% BERKELEY		LIKELIHOOD TO VISIT AGAIN	 48.1% VERY LIKELY	 43.2% LIKELY
	2.5% FAIRFIELD			TOP ACTIVITIES PARTICIPATED IN	 78.6% WINE TASTING ROOMS AT WINERIES
WINERIES/ TASTING ROOMS VISITED	 2.7 AVERAGE	DAILY IN-MARKET SPENDING	 \$357 AVERAGE, PER PARTY, PER DAY	 33.9% SHOPPING	

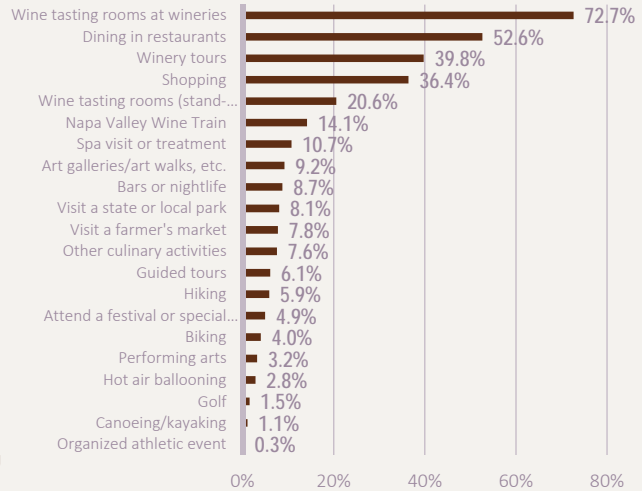
Source: Visit Napa Valley, Napa Valley Visitor Profile 2016 — Final Report of Findings

VISITOR VOLUME



Visitors to Napa Valley, 2016	
Napa Lodging	1,017,783
Private Napa Residences	157,954
Home Share Rentals	81,553
Day Trip Visitors	2,280,226
Total	3,537,516

ACTIVITIES & ATTRACTIONS



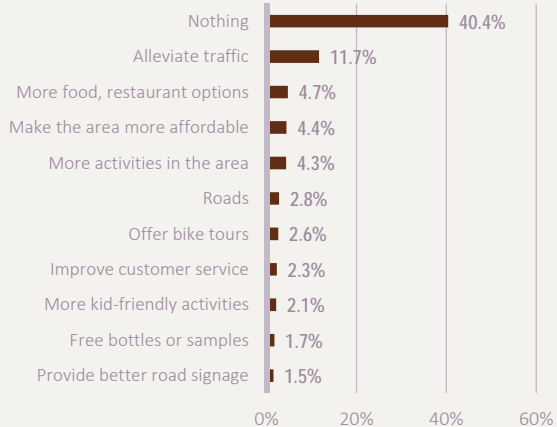
QUESTION: ON THIS TRIP, IN WHICH ACTIVITIES OR ATTRACTIONS WILL YOU PARTICIPATE IN WHILE IN THE NAPA VALLEY? (SELECT ALL THAT APPLY)

Base: All respondents. 1,247 responses (weighted).

Visit Napa Valley – Napa Valley Visitor Profile 2016 – Final Report of Findings

Destination Analysts
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ENHANCING THE NAPA VALLEY



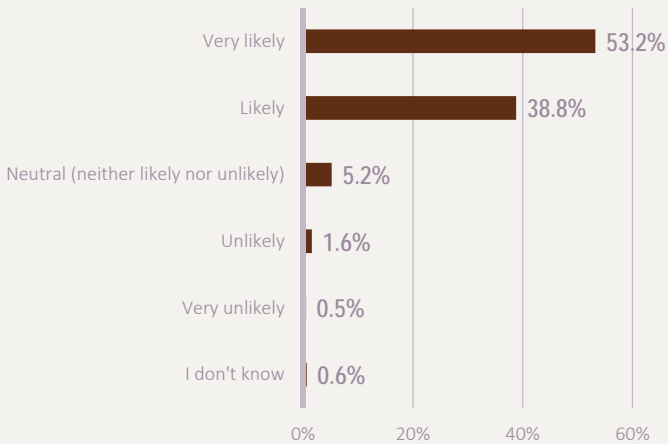
QUESTION: WHAT ASPECTS OF YOUR EXPERIENCE IN THE NAPA VALLEY WOULD YOU ENHANCE?

Base: All respondents. 627 responses (weighted).

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LIKELIHOOD TO RETURN TO THE NAPA VALLEY



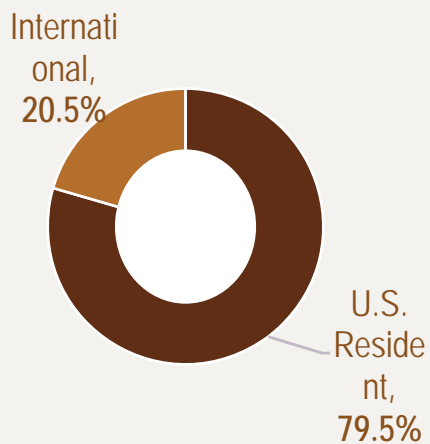
QUESTION: HOW LIKELY ARE YOU TO RETURN TO THE NAPA VALLEY? (SELECT ONE)

Base: All respondents. 1,056 responses (weighted).

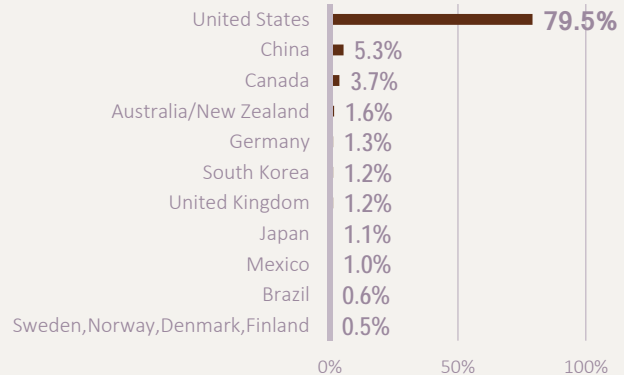
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COUNTRY OF RESIDENCE



TOP COUNTRIES OF RESIDENCE



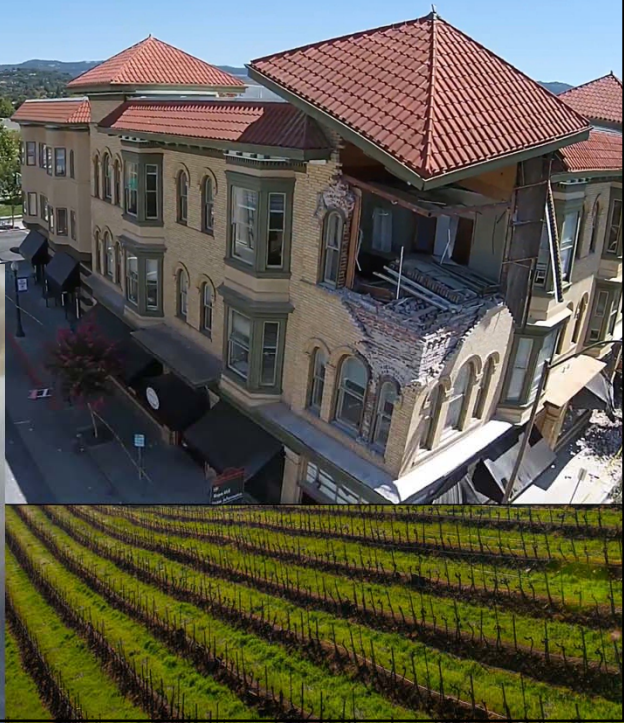
QUESTION: WHERE DO YOU CURRENTLY LIVE?

Base: All respondents. 1,154 responses

Visit Napa Valley – Napa Valley Visitor Profile 2016 – Final Report of Findings

Destination Analysts
DO YOUR RESEARCH

NAPA VALLEY CALIFORNIA



AD Copy

THE NAPA VALLEY HAS EXPERIENCED MEANINGFUL LOSS DURING THESE RECENT FIRES.

But, what we haven't lost is our spirit.

Our spirit to work together to rebuild. Rebound. Reopen.

This is the spirit of the Napa Valley.

And it will take more than fire to stop it.

#NAPAVALLEYSPIRIT

Take a good long look around this valley. What you'll see is a spirit that is burning brighter than any fire ever could. Neighbors helping neighbors. Volunteers making difficult times a little less difficult. Firefighters, first responders and law enforcement putting the needs of others in front of everything, including their own safety. This is who we are. This is where we're from. This is the #NAPAVALLEYSPIRIT

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LEARN MORE
NAPA
VALLEY

#NAPAVALLEYSPIRIT | @NAPAVALLEYSPIRIT





KEYS TO NAPA VALLEY'S SUCCESS

Soil and Climate

Great Diversity of Experiences

Agricultural Preserve

Remarkable Entrepreneurs

Proximity to San Francisco

And...

Collaboration, Collaboration,
Collaboration!

*"Coming together is a beginning;
keeping together is progress; working
together is success."*

- Henry Ford