Japan Tourism Presentations
8 February to 10 February, 2016
AGENDA

Welcome Video
Business/Strategic Overview
Brief History of Napa Valley
Funding of Visit Napa Valley
Partnership Overview
“Sizzle Reel”
Sales Review
Marketing Review
Visitor Profile and Economic Impact of Tourism in Napa County
Questions??
Napa Valley Welcome Video
BUSINESS UPDATE & STRATEGIC INITIATIVES

Clay Gregory, CEO & President
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

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
VNV BOARD OF DIRECTORS FY 2016

Tom Bensel
Culinary Institute of America
Stan Boyd
Holiday Inn Express
Sarah Brooks
Napa River Inn
Steve Carlin
Oxbow Public Market
Ann Marie Conover
Meadowood Napa Valley
Stephen Corley
Monticello Vineyards

Chris Canning
Calistoga Chamber of Commerce
Larry Florin
County of Napa
Michael Gyetvan
Norman Rose Tavern, Atlas Social, Pizzeria Azzuro
George Goeggel
Auberge du Soleil
Clay Gregory
Visit Napa Valley
Michael Palmer - CHAIR
The Meritage Resort

Linda Reiff
Napa Valley Vintners
Don Shindle
Westin Verasa
Rick Swig
Napa Winery Inn
David Shipman
Las Alcobas
Michael Woods
Mount View Hotel & Spa
Reynaldo Zertuche
Embassy Suites
FY 2016 BUDGET

Total Expenses = $6,419,300

- 40% Brand Marketing
- 27% Group Sales
- 11% Direct to Consumer
- 9% Research
- 8% Admin
- 2% Vine Trail
- 2% Guest Info Network
- 1% Welcome Center
A Brief History of the Napa Valley
George Yount plants first vineyards in 1838-39
First Wineries Established, Tourism Begins

Charles Krug, first commercial winery, 1861
Samuel Brannan founds Calistoga in late 1880’s
1968 Napa Valley Agricultural Preserve
Founded – First in the U.S.
Napa Valley Agricultural Preserve
Highest and 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
The Napa Valley Pillars
Napa Valley Wines

- 500+ Wineries
- 95% Family Owned
- Grow Albariño to Zinfandel

Napa Valley American Viticulture Area
16 Sub-AVAs
Small in size, big in quality and diversity

- 77% of NVV members make less than 10,000 cases of a wine a year
- 63% produce less than 5,000 cases
- 4% of California wine
- 4/10ths of 1% of the world’s wine
Restaurants & Culinary Scene
Napa Valley Farm-to-Table

- 125 Restaurants
- Most Michelin Stars per capita, including two 3-star restaurants
- Cooking classes & the Culinary Institute of America
- Olive oil tastings
- Farmer’s markets
- Oxbow Public Market
Culinary Tourism

- **Flavor! Napa Valley** – 4 days of food, wine, and fun
- **Napa Valley Restaurant Week** – set price menus & special offers
- **Napa Truffle Festival**
Have Some Culture With Your Cabernet

- Museums
- Winery collections
- Performing arts
- Historic tours
- Public art
- Cultural Events
  - Napa Valley Arts in April
  - Napa Valley Film Festival
  - Festival del Sole
  - BottleRock Napa Valley
Wellness & Active Tourism
Health, Wellness & Adventure

- Hot air balloon rides
- Napa Valley Vine Trail
- Lake Berryessa & the Napa River
- Hiking trails
- Yoga in the vineyards
- Luxurious spa treatment or relaxing mudbath
- Five public golf courses
Meetings & Events
Intimate Experiences to Larger Gatherings

• More than 200,000 sq. ft. of meeting space
• From ballrooms to barrel room and wine caves to historic surroundings
• Incredible variety of unique activities
Broad Variety of Lodging Options

• 5,000 rooms in 150 properties
• 5-Star Resorts to intimate Inns and B&Bs
• Variety of locations: in-town property close to nightlife, a luxurious spa getaway, or the peaceful calm of a remote vineyard setting
Cheers to 2015!

Fiscal Year recap July – December 2015
KEY PARTNERSHIPS

1. 278 VISITOR SERVING BUSINESSES - LODGING, WINERIES, TASTING ROOMS, RESTAURANTS, TRANSPORTATION COMPANIES, ATTRACTIONS, TOUR COMPANIES, ETC. \(\textit{(ANNUAL PARTNERSHIP FEE OF} \$600 \textit{TO} \$10,000 \textit{PER YEAR)}\)

2. 36 NOT-FOR-PROFIT ORGANIZATIONS - ARTS VENUES, ARTS ORGANIZATIONS, PARKS, FIVE CHAMBERS OF COMMERCE, FIVE WELCOME CENTERS, ETC. \(\textit{(NO FEE FOR PARTNERSHIP)}\)
KEY PARTNERSHIPS

3. OTHER DMO AND TRAVEL ADVOCACY ORGANIZATIONS (SAN FRANCISCO TRAVEL, VISIT CALIFORNIA, BRAND USA, CALTRAVEL, U.S. TRAVEL, DESTINATION MARKETING ASSOCIATION INTERNATIONAL – **NO FEE**)

4. MULTIPLE GOVERNMENT ENTITIES, INCLUDING THE NAPA COUNTY BOARD OF SUPERVISORS AND FIVE CITY COUNCILS (**NO FEE**)
PARTNER ACTIVATION

1. EMAIL AND ENGAGE VNV STAFF
   – add our email address to your list of safe senders to avoid spam folder
   – respond to media queries, visit requests, and sales leads

2. PARTICIPATE IN OUR PROGRAMS
   – review program summaries in the partner portal
   – provide offers or information for elevated exposure

3. KEEP WEBSITE LISTING CURRENT
   – update your listing, check monthly
   – new hours, menu, photos, events – keep it relevant year-round

4. POST EVENTS
   – submit on the community calendar - VNV website and other visitor-serving sites
   – Digital Promotional Form (partner portal) for inclusion in newsletters and more
   – ensure landing page is complete and submit link

5. ENGAGE WITH OUR SOCIAL MEDIA
   – connect your social pages with us on Facebook, Twitter, Instagram, Pinterest
   – use the hashtag #VisitNapaValley
Tourism Improvement District
TOURISM IMPROVEMENT DISTRICT

What is it? How does it work?

- Assessment of all lodging guests at 2% of gross room revenue
- 25% of the assessment remains in local jurisdiction (town or unincorporated County)
- District includes all five incorporated towns in Napa County, as well as the unincorporated County area
TOURISM IMPROVEMENT DISTRICT

Facts & Figures

• Established in 2010 for initial five year term
• District renewed for ten years, expiring June 2025
• Funding for Valley-wide marketing now at > $6 million, up from pre-TID funding of < $1 million
• NOT A TAX – Common misconception that taxpayers are funding tourism activities, or that government controls these funds
SMITH TRAVEL RESEARCH DATA

<table>
<thead>
<tr>
<th>12-Months Ending December</th>
<th>% Change over last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupancy</td>
<td>72.0%</td>
</tr>
<tr>
<td>ADR</td>
<td>$290.79</td>
</tr>
<tr>
<td>RevPAR</td>
<td>$209.37</td>
</tr>
<tr>
<td>Revenue</td>
<td>$359.1M</td>
</tr>
</tbody>
</table>

Reporting: 86.5% of total rooms
<table>
<thead>
<tr>
<th>Year</th>
<th>Total Revenue</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$334,600,000</td>
<td>+7.9%</td>
</tr>
<tr>
<td>2013</td>
<td>$309,122,518</td>
<td>+5.6%</td>
</tr>
<tr>
<td>2012</td>
<td>$292,687,633</td>
<td>+16.9%</td>
</tr>
<tr>
<td>2011</td>
<td>$250,472,805</td>
<td>+15.7%</td>
</tr>
<tr>
<td>2010</td>
<td>$216,565,148</td>
<td>+13.4%</td>
</tr>
<tr>
<td>2009</td>
<td>$190,905,262</td>
<td>-17%</td>
</tr>
<tr>
<td>2008</td>
<td>$229,904,699</td>
<td>+7.6%</td>
</tr>
</tbody>
</table>
## NAPA COUNTY TOT REVENUE

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>FY14 TOT Revenue</th>
<th>% of Jurisdiction Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yountville</td>
<td>$6,261,476</td>
<td>66%</td>
</tr>
<tr>
<td>Calistoga</td>
<td>$4,456,446</td>
<td>49%</td>
</tr>
<tr>
<td>City of Napa</td>
<td>$15,129,048</td>
<td>20%</td>
</tr>
<tr>
<td>Unincorporated County</td>
<td>$10,543,464</td>
<td>7%</td>
</tr>
<tr>
<td>St. Helena</td>
<td>$1,729,887</td>
<td>10%</td>
</tr>
<tr>
<td>American Canyon</td>
<td>$1,249,159</td>
<td>8%</td>
</tr>
</tbody>
</table>
# 2005 vs. 2014 Tourism Data*

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

*2005 study by Purdue University, 2014 study by Destination Analysts
**Data sourced from STR Data
INDUSTRY & GOVERNMENT RELATIONS

• Hired Expert Consultant
• 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 PROGRAM

To Educate & Inform

• Government Officials & Staff
• Community Leaders
• Partners
• Stakeholders

Tools We Will Use

• Presentations
• Collateral materials
• Digital communications
• Media relations
• Community participation
CABERNET SEASON POSTCARD

LEGENDARY NAPA VALLEY

Visit Napa Valley is a non-profit destination marketing organization, whose mission is to promote, protect and enhance the Napa Valley’s position as America’s premier wine, food, arts, and wellness destination.

Experience the Legendary Napa Valley during Cabernet Season

NAPA VALLEY RESTAURANT WEEK
January 24–31, 2020
Support local restaurants and enjoy prix-fixe menus for lunch and dinner. During the week, tip and canned food items will be collected for the Napa Food Bank at any local Welcome Center. Visit NapaValley.com/WelcomeCenters

FLAVOR! NAPA VALLEY
March 16–20, 2020
The focus is farm-to-table cuisine, world-class wines and culinary stars take. Locals receive a 10% discount on the Grand Tasting through January 31 with the promo code LOCAL10.

NAPA VALLEY ARTS IN APRIL
April 2020
Support local artists and explore each community’s cultural contribution.

Learn more at VisitNapaValley.com

“Tourism sustains our community... it provides so much in terms of our ability to take care of our neighborhoods, to pass our roads, and pay for police and firefighters. We’re fortunate to have tourism here.”

-Napa City Councilman Peter Mott
TOURISM MATTERS

Strategic Tourism Management

- Community Sponsorship
- Generates City Revenue
- Recreation Vine Trail
- Arts in April
- Education Adopt-A-School
- Downtown Revitalization
- Funds Capital Projects
- Supports Jobs & Community Enrichment
SALES UPDATE
SALES TEAM ACCOMPLISHMENTS

Statistic: July – December 2015

- Direct Leads up 177%
- Cvent Leads up 162%
- Service Leads up 251%
- Booked Leads up 162%
SALES MISSIONS

Bringing the Napa Valley to Other Destinations

• New York, October 2015
• Texas, November 2015
• San Francisco/Silicon Valley, March 2016
• Chicago, May 2016
TRADE SHOWS

Representing the Napa Valley

- Virtuoso Travel Show
- IMEX Las Vegas
- CalSAE Seasonal Spectacular
- MPINCC Annual Conference
- Go West Summit
- IPW
- IMEX Frankfurt
- Discover American Denmark
DOMESTIC SALES ACTIVITIES

- Incentive Works- Vancouver
- San Francisco Travel Client Events- Chicago, San Francisco and Arizona
- Luxury Meeting Summits- Texas, Southern California and East Coast
- SmartMeetings Day- San Francisco
- Sales Trips- New York, Southern California and Chicago
- Corporate Client Event
- All Things Meetings
INTERNATIONAL SALES ACTIVITIES

Going around the Globe

• Familiarization Trips
• Visit California Sales Missions
• Travel Trade contracts
• SFTA LA Tour Receptors
• Club California Series China
• FDM Travel Show- Denmark
• Swansons Long Haul Day
SALES ACTIVITIES BY MARKET SEGMENT

- Corporate Group: 33%
- International Tour and Travel/Leisure: 19%
- International Incentive Group/luxury Leisure: 19%
- Third Party Planners: 6%
- Association: 5%
- Domestic Tour and Travel: 1%
- Corporate Incentive: 17%
GROUP MARKETING

Advertising Campaign September 2015 – May 2016

- Cvent
- PlanYourMeetings
- Smart Meetings
- MPI Annual
- Successful Meetings

- Meeting Planner Newsletter
- Virtuoso

Print ad

Dedicated Email
NEW COLLATERAL
CABERNET SEASON REFINED BRANDING

mid Fall to early Spring

January

March

April
CABERNET SEASON
Advertising Campaign: October - March

• Launched with San Francisco Chronicle spread Oct 15, 2015
• TV commercials running on Comcast in Bay Area, Sacramento, LA, and San Diego
• National, targeted digital campaign
• Included in Tourism Matters postcard to Napa County residences in mid-January
• Digital Results TD:
  – Advertising: 3.918M impressions, .06% CTR
  – VNVwebpage: 12,300 pageviews
RESTAURANT WEEK

January 24-31, 2016 – 30+ Participants

• Fixed Price Menus:
  – Lunch - $20 for minimum of 2 courses
  – Dinner - $36 or $46 for minimum of 3 courses

• Charitable component – corkage fees at select restaurants are donated & canned goods are collected at each Welcome Center to benefit the Napa Food Bank

• Media Relations highlights:
  – CRN Digital Talk Radio’s “What’s Cookin” Wine Industry Network; “Good Day Sacramento” (CBS); KCBS Radio; Haute Living
RESTAURANT WEEK
Advertising Campaign: January

- Regional print campaign - *San Francisco Chronicle & Napa Valley Register*

- Regional digital campaign and retargeting:
  - SFGate.com
  - Sojern
  - NOSH & Berkeleyside
  - Visit California Restaurant Month

- Digital Ad Results TD:
  - 967,190 impressions, .08% CTR
  - VNV Landing Page: 2,732 pageviews
FLAVOR! NAPA VALLEY

What is new this year?

• March 16-20, 2016
• Silverado Resort Celebrity Chef and Vintner Golf Tournament
• Napa Valley Wine Tours
• 29 on 29 Lunch Specials
• The Grand Tasting moved to Saturday
FLAVOR! NAPA VALLEY
Advertising Campaign: December - March

Print and digital paid & in-kind media partners with:

- Diablo Magazine
- Dot 429
- Eater
- Modern Luxury / SF Magazine
- Napa Sonoma
- San Francisco Chronicle
- San Francisco Travel
- Sojern
- Sunset
- The Wall Street Journal
- WHERE Magazine
- Wine Spectator

Digital Results TD:

- 1,211 impressions
- .07% CTR
**FLAVOR! NAPA VALLEY**

- **FlavorNapaValley.com**
  - Redesigned and launched in October
  - 13K visits
- **Flavor E-Newsletter**
  - Redesigned template
  - +5k subscribers
- **Flavor Social Media**
  - 15k followers on Facebook
  - 5k on Twitter
  - 2k on Instagram

- **How to Get Involved:**
  - Chefs/Restaurants
    Madison@AFandCo.com
  - Wineries
    CSawyer@sonic.net
  - Sponsorship
    LizK@AFandCo.com
  - Comments? Feedback?
    Emily@VisitNapaValley.com
ARTS IN APRIL

Advertising Campaign: March - April

• TV commercials on Comcast in Bay Area & Sacramento
• Print in San Francisco Chronicle & Napa Valley Register
• Digital campaign regional and national retargeting

What’s new?
– Not divided up by regional weeks
– "Spotlight Status” for select events
ARTS IN APRIL

Media Relations Press Preview – Tuesday, Jan. 21
- Tour of diRosa
- “500 Years of Wine in Art” at Sterling Vineyards
- Lunch at Lucy at Bardessono
- “Garden to Table Floral Workshop” at Peju Province Winery
- Desserts and Printmaking at a Napa art studio

Upcoming Workshops
- Pro Marketing and PR Tips for Arts in April – Wednesday, Feb. 10
- Matchmaker Exhibition – Tuesday, February 16
- Arts in April Preview Party – Monday, March 28

Want to get involved? Reach out to ArtsinApril@ArtsCouncilNV.org
## MEDIA RELATIONS

<table>
<thead>
<tr>
<th></th>
<th>July – Dec 15</th>
<th>July–Dec 14</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Releases</td>
<td>29</td>
<td>10</td>
<td>+190%</td>
</tr>
<tr>
<td>Impressions</td>
<td>612,474,763</td>
<td>387,936,794</td>
<td>+58%</td>
</tr>
<tr>
<td>Press Visits</td>
<td>111</td>
<td>34</td>
<td>+226%</td>
</tr>
</tbody>
</table>
# SOCIAL MEDIA

<table>
<thead>
<tr>
<th></th>
<th>July-Dec 15</th>
<th>July-Dec 14</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facebook</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Audience</td>
<td>107,513</td>
<td>68,185</td>
<td>58%</td>
</tr>
<tr>
<td>New Followers</td>
<td>21,399</td>
<td>22,136</td>
<td>-3%</td>
</tr>
<tr>
<td>Engagement</td>
<td>107,200</td>
<td>88,067</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Instagram</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Audience</td>
<td>18,373</td>
<td>5,587</td>
<td>229%</td>
</tr>
<tr>
<td>New Followers</td>
<td>7,013</td>
<td>1,683</td>
<td>317%</td>
</tr>
<tr>
<td>Engagement</td>
<td>61,453</td>
<td>16,460</td>
<td>273%</td>
</tr>
<tr>
<td><strong>Twitter</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Audience</td>
<td>18,812</td>
<td>13,556</td>
<td>39%</td>
</tr>
<tr>
<td>New Followers</td>
<td>3,495</td>
<td>3,751</td>
<td>-7%</td>
</tr>
<tr>
<td>Engagement</td>
<td>28,714</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td><strong>Pinterest</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Audience</td>
<td>3,539</td>
<td>4,575</td>
<td>-23%</td>
</tr>
<tr>
<td>New Followers</td>
<td>-706</td>
<td>378</td>
<td>-287%</td>
</tr>
<tr>
<td>Engagement</td>
<td>15,384</td>
<td>6,360</td>
<td>142%</td>
</tr>
<tr>
<td><strong>Youtube</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Video Views</td>
<td>2,185</td>
<td>2,014</td>
<td>8%</td>
</tr>
</tbody>
</table>

- Revamping Pinterest to align with strategy, maximize SEO
- Seasonal aerial videos with local videographer
- Launched Instagram and Twitter video ads
VNV BLOG

Top Ten Posts: July – December 2015

<table>
<thead>
<tr>
<th>Page Title</th>
<th>Pageviews 161,590</th>
<th>Unique Pageviews 138,010</th>
<th>Avg. Time on Page 00:01:57</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Where to Celebrate New Year’s Eve in the Napa Valley - The Visit Napa Valley Blog</td>
<td>19,681 (12.21%)</td>
<td>11,913 (8.65%)</td>
<td>00:02:16</td>
</tr>
<tr>
<td>2. Ten Things to Do Besides Wine-Tasting in Napa Valley - The Visit Napa Valley Blog</td>
<td>18,421 (11.39%)</td>
<td>9,846 (7.10%)</td>
<td>00:02:52</td>
</tr>
<tr>
<td>3. Undiscovered Napa Valley: Top 10 Small Wineries - The Visit Napa Valley Blog</td>
<td>9,149 (5.61%)</td>
<td>8,334 (6.04%)</td>
<td>00:02:05</td>
</tr>
<tr>
<td>4. What to pack and wear in the Napa Valley - The Visit Napa Valley Blog</td>
<td>8,381 (5.19%)</td>
<td>7,563 (5.43%)</td>
<td>00:03:34</td>
</tr>
<tr>
<td>5. Home - The Visit Napa Valley Blog</td>
<td>8,268 (4.99%)</td>
<td>6,027 (4.35%)</td>
<td>00:01:06</td>
</tr>
<tr>
<td>6. Where to Feast on Thanksgiving, Napa Valley-Style - The Visit Napa Valley Blog</td>
<td>7,963 (4.89%)</td>
<td>5,334 (3.89%)</td>
<td>00:02:33</td>
</tr>
<tr>
<td>7. Top 10 Napa Valley Wineries “Off the Beaten Path” - The Visit Napa Valley Blog</td>
<td>8,187 (4.83%)</td>
<td>4,832 (3.45%)</td>
<td>00:02:04</td>
</tr>
<tr>
<td>8. The Best Wine Tasting Rooms in Napa Valley - The Visit Napa Valley Blog</td>
<td>5,392 (3.26%)</td>
<td>4,078 (2.98%)</td>
<td>00:02:04</td>
</tr>
<tr>
<td>9. The Most Beautiful European-Style Wineries in Napa Valley - The Visit Napa Valley Blog</td>
<td>5,129 (3.11%)</td>
<td>4,465 (3.25%)</td>
<td>00:02:36</td>
</tr>
<tr>
<td>10. Napa Valley Wine Tasting Rooms Open After 5: The Visit Napa Valley Blog</td>
<td>3,830 (1.91%)</td>
<td>2,722 (1.78%)</td>
<td>00:03:45</td>
</tr>
</tbody>
</table>

July-Dec 15
July-Dec 14 % Growth
Unique Views 138,010 39,137 253%
# CONSUMER E-NEWSLETTER

## July-Dec 2015 vs. July-Dec 2014

<table>
<thead>
<tr>
<th>E-Newsletter</th>
<th>July-Dec 15</th>
<th>July-Dec 14</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscribers</td>
<td>61,000</td>
<td>56,000</td>
<td>9%</td>
</tr>
<tr>
<td>Open Rate</td>
<td>19.6%</td>
<td>22.2%</td>
<td>-12%</td>
</tr>
<tr>
<td>CTR</td>
<td>2.2%</td>
<td>2.0%</td>
<td>10%</td>
</tr>
</tbody>
</table>
VISITNAPAVALLEY.COM

<table>
<thead>
<tr>
<th></th>
<th>July-Dec 15</th>
<th>July-Dec 14</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Website</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unique Visitors</td>
<td>579K</td>
<td>504K</td>
<td>14%</td>
</tr>
<tr>
<td>(Users)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visits (Sessions)</td>
<td>759K</td>
<td>661K</td>
<td>15%</td>
</tr>
<tr>
<td>Pageviews</td>
<td>2.5M</td>
<td>2.4M</td>
<td>4%</td>
</tr>
<tr>
<td>Pages per visit</td>
<td>3.3</td>
<td>3.6</td>
<td>-8%</td>
</tr>
<tr>
<td>Avg. visit duration</td>
<td>2.4 min.</td>
<td>2.5 min.</td>
<td>-4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Top Three</strong></th>
<th><strong>Pages Visited</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2015</strong></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Homepage</td>
</tr>
<tr>
<td>2</td>
<td>Things to Do</td>
</tr>
<tr>
<td>3</td>
<td>Wineries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Referrals</strong></th>
<th><strong>2015</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Google</td>
</tr>
<tr>
<td>2</td>
<td>Direct</td>
</tr>
<tr>
<td>3</td>
<td>Yahoo</td>
</tr>
</tbody>
</table>
WEBSITE REDESIGN
Launch date set for May 3, 2016

- Cleaner design
- Responsive to tablet & mobile
  - Current app will be replaced with responsive mobile site
- Features:
  - Seamless CMS integration with CRM
  - Search engine optimization
  - Blog integration
  - Interactive map
  - Emphasis on photography and video
  - Expanded Meeting Planner section
  - Easier partner management
WELCOME CENTER

The Starting Point for All Visitors

• Created True Tour (virtual tour) of Welcome Center
  • Continue to increase promotion for the Centers across the Valley

<table>
<thead>
<tr>
<th></th>
<th>2015 Total</th>
<th>2014 Total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors Assisted</td>
<td>144,160</td>
<td>137,714</td>
<td>+4.6%</td>
</tr>
<tr>
<td>Guest Data Collected</td>
<td>15,309</td>
<td>11,788</td>
<td>+30%</td>
</tr>
<tr>
<td>Guidebooks Mailed</td>
<td>586</td>
<td>421</td>
<td>+39%</td>
</tr>
<tr>
<td>Phone Itineraries</td>
<td>7,814</td>
<td>7,622</td>
<td>+2.5%</td>
</tr>
<tr>
<td>Activity Revenue</td>
<td>$100,000</td>
<td>$79,800</td>
<td>+25%</td>
</tr>
<tr>
<td>Room Revenue</td>
<td>$316,500</td>
<td>$363,000</td>
<td>-13%</td>
</tr>
</tbody>
</table>
SUPER BOWL 50

February 7, 2016

- **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

- **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
Thank You!!!