




Economic Development Dashboard

These key indicators gauge the city of Napa's economic performance and are updated on a quarterly basis as needed




The City's Economy at a Glance




\$354

Hotel Average Daily Rate
(Apr. 2025, Six-Month
Moving Average)




55.7%

Hotel Occupancy Rate
(Apr. 2025, Six-Month
Moving Average)




+0.8%

Hotel Occupancy Rate
past year difference (Apr.
2024 - Apr. 2025)




+2.3%

Hotel Occupancy Rate
past two year difference
(Apr. 2023 - Apr. 2025)




\$7.48 Billion

City of Napa Gross Regional Product
Economic Output (2023 est.)




-1.3%

City of Napa Taxable Sales Percent
Increase (2023 Q4 to 2024 Q4)




-3.0%

Napa County Taxable Sales Percent
Increase (2023 Q4 to 2024 Q4)




-2.3%

California Taxable Sales Percent
Increase (2023 Q4 to 2024 Q4)




\$910,762

Median home price within the City as
of Apr. 2025 (Zillow Research)




-0.9%

City of Napa one year home price
growth rate (Apr. 2024 - Apr. 2025)



+2.9%

City of Napa two year home price
growth rate (Apr. 2023 - Apr. 2025)



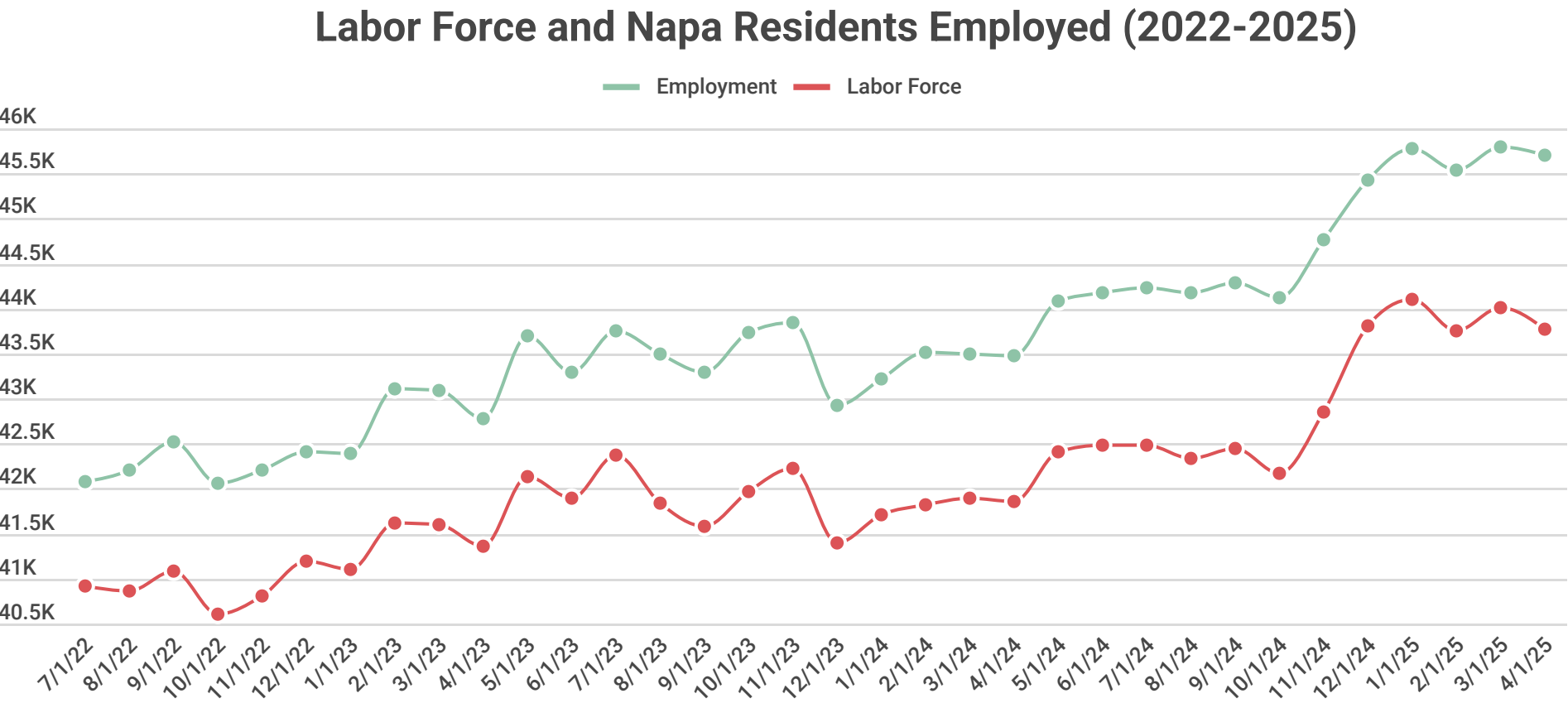
-3.3%

City of Napa Housing Market Forecast
(% change in median home price) to
Apr. 2026

Labor Force and Employment

Takeaway: Napa's labor force increased by approximately 500 residents from Q4 2024 to Q1 2025. Napa's number of employed residents was flat since Q4 2024, pushing Napa's unemployment rate to 4.2% after seasonal adjustments as of April 2025, up from 3.7% in April 2024. Based on county comparison data, regional job opportunities for Napa residents may slow down during 2025; unemployment is expected to increase more by 2026.

Description: The city of Napa's labor force (red line in the graph) is determined by the number of residents working or looking for work. Employed residents (green line in the graph) live in Napa and have jobs. This illustrates how many Napa residents are employed compared to the overall workforce.



Source: California EDD and Bureau of Labor Statistics. Seasonally adjusted.

Unemployment Rate

4.2%

Apr. 2025

3.7%

Apr. 2024

3.3%

Apr. 2023

3.4%

Apr. 2022

7.1%

Apr. 2021

19.0%

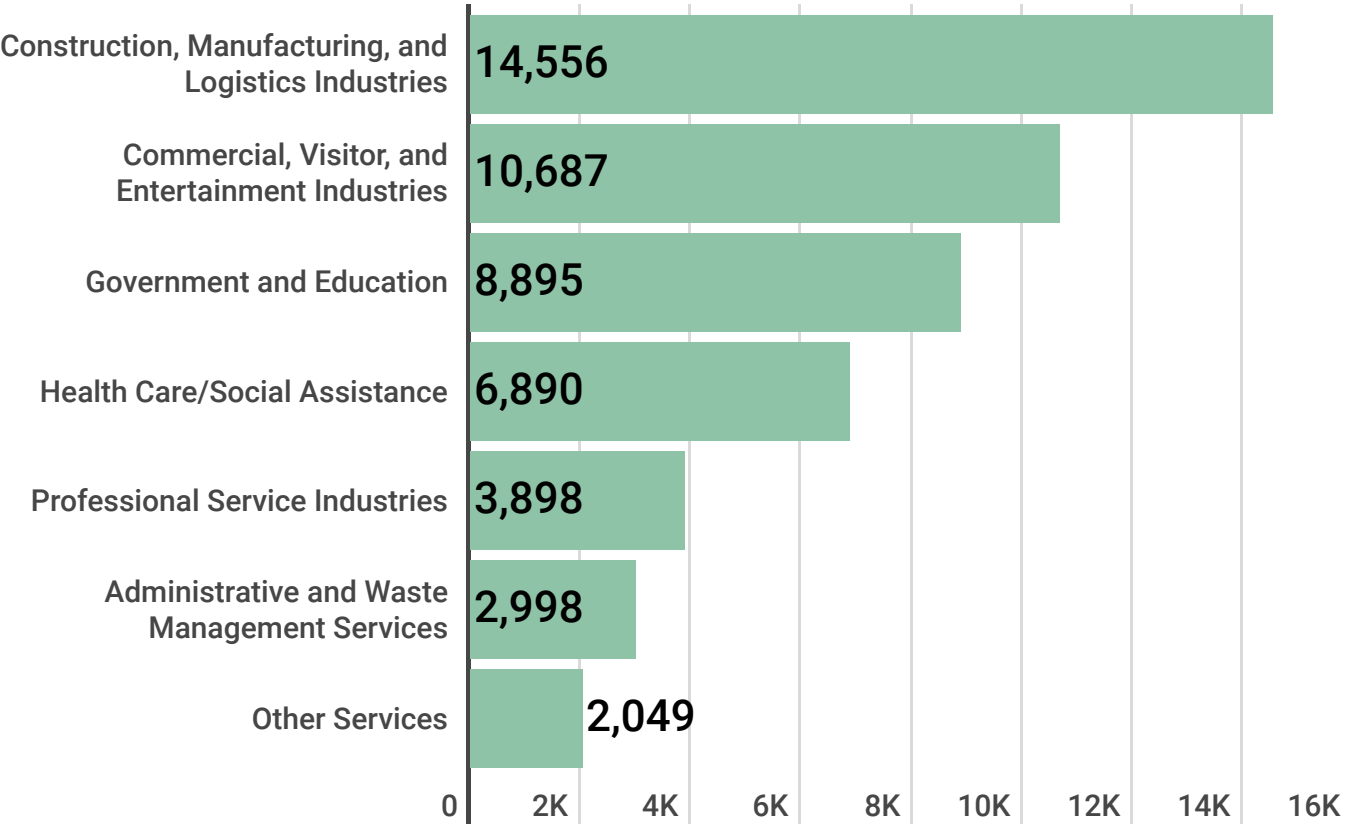
Apr. 2020

Employment by Industry (Jobs in the City of Napa)

Takeaway: The number of people working for Napa-based employers is estimated to be 49,973 in 2023 (the estimate for 2022 was 49,155 jobs). At 14,556 jobs, construction, manufacturing (incl. wine making), and logistics workers hold the largest share of employment within Napa. The next group is the commercial, visitor, and entertainment industries, with 10,687 jobs. Government and education are the third highest industries, with 8,895 jobs.

Description: The graph and table below show the estimated number of jobs in the city of Napa for 2023, including employed residents and inbound commuters. These are the latest data as of December 2024.

Jobs in the city of Napa (includes Residents and inbound Commuters) (2023)



Industry	Estimated Number of Jobs
Construction, Manufacturing, and Logistics Industries	14,556
Agriculture	2,898
Mining	20
Utilities	150
Construction	3,348
Manufacturing	6,142
Wholesale	999
Transport/Logistics/Warehousing	999
Commercial, Visitor, and Entertainment Industries	10,687
Retail	4,740
Arts and Events	400
Hotels/Motels and Restuarants	5,547
Government and Education	8,895
Education	1,149
Government	7 746

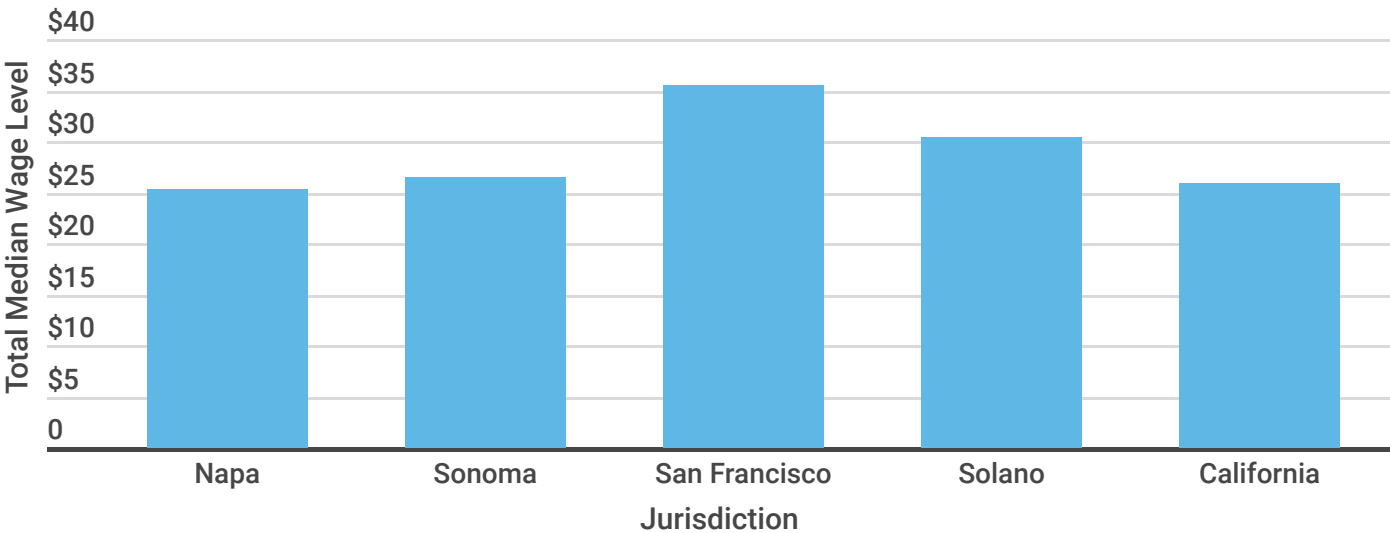
Source: California EDD, Census Bureau, EMSI (Lightcast)

Median Wages by Occupation

Takeaway: The median wage for jobs worked in 2025 within the City of Napa is \$25.36 for all industries combined (+\$0.74 from 2024, +3.0%), where the median in Sonoma is \$26.51, San Francisco’s metropolitan area (including Alameda and San Mateo counties) is \$35.56, and California is \$27.38 (the 2025 data are not yet available for San Francisco city and county alone or Marin County as of June 1, 2025). These data indicate that overall wages in Napa are competitive with those in adjacent Sonoma County and lower than in Solano County. For Napa, construction jobs had more than a 14% wage increase since 2024. Napa as a city economy is a significant portion of Napa County’s labor market in terms of jobs available and a variety of positions.

Description: The chart and table show the median wage level by occupation for selected jurisdictions and California overall. The complete list of occupations can be viewed by scrolling on the table.

Median Wages by Occupation (2025)



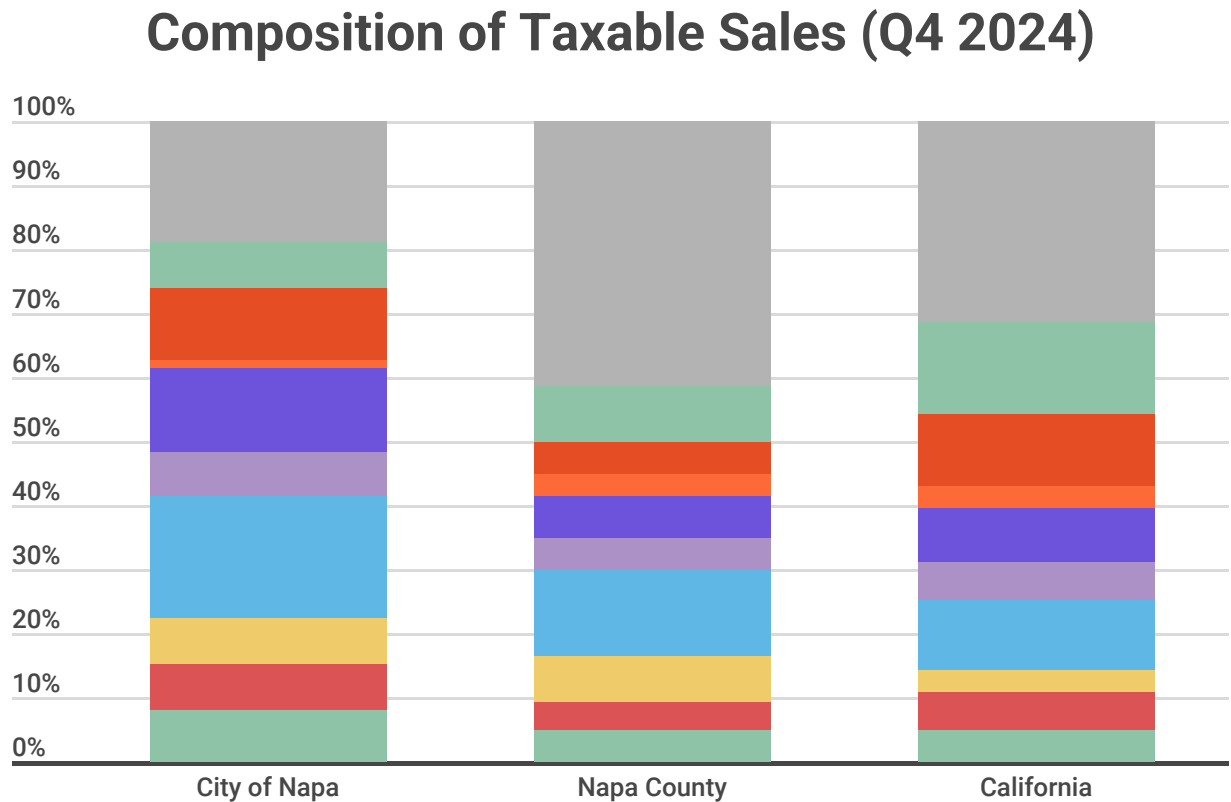
Occupation Type	Napa	Sonoma	SF	Solano	CA
Management	\$62.33	\$59.39	\$83.72	\$60.92	\$66.78
Business and Financial Operations	\$40.67	\$40.22	\$52.97	\$41.37	\$45.21
Computer and Mathematical	\$46.30	\$48.43	\$79.69	\$49.70	\$65.40
Architecture and Engineering	\$48.23	\$56.58	\$62.95	\$52.70	\$57.44
Life, Physical, and Social Science	\$35.69	\$41.56	\$60.67	\$46.78	\$46.28
Community and Social Service	\$30.37	\$30.75	\$34.76	\$34.03	\$30.41
Legal	\$51.26	\$50.71	\$75.42	\$45.50	\$62.16
Educational Instruction and Library	\$31.88	\$31.33	\$35.30	\$31.61	\$31.56
Arts, Design, Entertainment, Sports, and Media	\$30.63	\$30.15	\$44.08	\$27.13	\$37.26
Healthcare Practitioners and Technical	\$61.46	\$62.96	\$66.00	\$64.72	\$57.69
Healthcare Support	\$18.42	\$18.28	\$17.66	\$17.49	\$17.24
Protective Service	\$28.07	\$27.41	\$27.16	\$44.99	\$26.68

Source: California EDD and Bureau of Labor Statistics (2024).

Taxable Sales

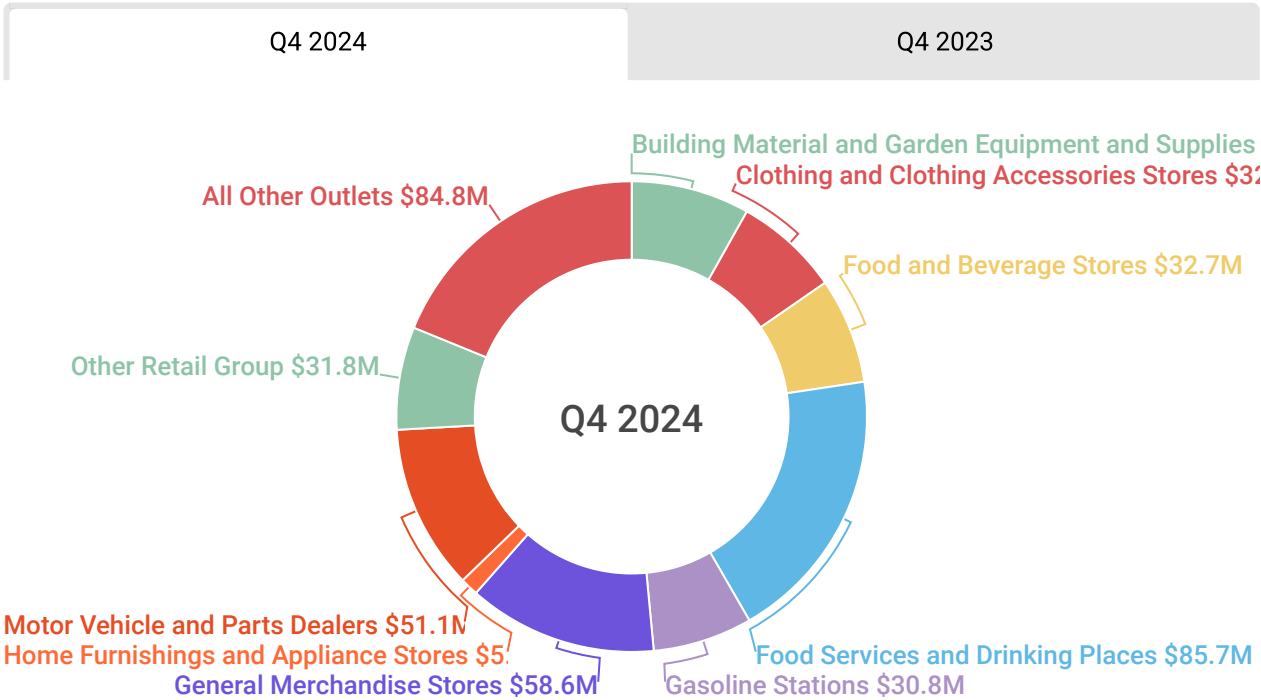
Takeaway: The total taxable sales of all retail categories in Napa were \$450.2 million in Q4 2024, a -1.3% decrease from Q4 2023. However, for the 12 months ending on December 31, 2024, the annualized change from December 31, 2023, was -0.6%. The top retail sector is restaurants and bars (Food Services and Drinking Places) in Q4 2024 at 19.0% (\$85.6 million), followed by general merchandise stores (department and gift stores) sales at 13.0% (\$58.6 million). The All-Other Outlets category includes various businesses with retail points of sale. Still, it is not a retail business as a primary function (winery tasting rooms are examples), with 18.8% (\$84.8 million) of taxable sales. Napa County taxable sales fell by -3.0% year on year and -1.7% comparing 2024 taxable sales to 2023, while California slipped by -2.3% and -0.9% year on year and annually, respectively. The latest data are from April 2025.

Description: The charts below summarize the composition of taxable sales to track business health, which forms the basis of revenue and sales tax revenue generated for the City.



Source: California Department of Tax and Fee Administration

Comparison of city of Napa Taxable Sales by Major Retail Category (Q4 2024, Q4 2023)



Numbers may not add up due to rounding.
Source: California Department of Tax and Fee Administration

Business Licenses

Takeaway: Overall, the number of new business starts for Q1 2025 has outpaced the number of closed licenses. Service businesses made up most of the latest starts and closures, indicating the swing of these business types compared to retail, food, and beauty. Two tasting room/wine sales license closures and two openings resulted in a zero change and no new accommodation starts.

Description: The table below illustrates the number of businesses in the City limits that either (1) applied for a new business license with a start date or (2) closed out a license between January 1, 2025, and March 31, 2025. Business Category sectors are specific business types used as descriptors by the City of Napa.

Open and Closed Business Licenses (Q1 2025)

Business Category	Number of New Starts	Number of Closed	Difference
Accomodation	0	0	0
Retail Sales	17	5	12
Restaurant/Bar/Food	10	0	10
Art/Entertainment	9	0	9
Beauty/Massage	13	1	12
Services	79	10	69
Tasting Room/Wine Sales	2	2	0
Manufacturing/Wine Production	0	1	-1
Q1 Total:	130	19	111
Year to Date (2025):	130	19	111

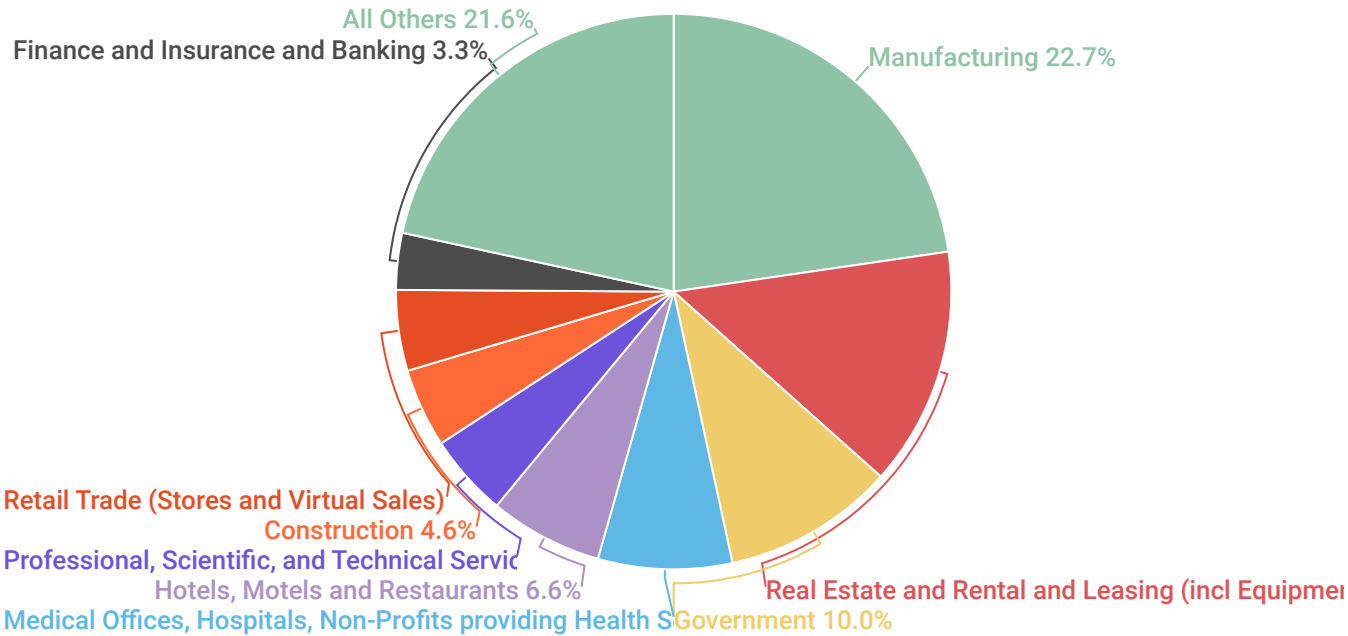
Source: HdL

Economic Output

Takeaway: Napa's top industries are Manufacturing (including wineries where bottled wine is produced), Real Estate, Rental and Leasing, Government, Medical Services, and Visitor-Serving (Hotels, Motels, and Restaurants). The latest data are from December 2024.

Description: This chart tracks the top economic drivers in Napa's economy. It summarizes the estimated economic output from various industries within the city economy for 2023 in 2021 dollars. The total economic output of Napa County is approximately \$11.8 billion, while the city economy is \$7.48 billion (in 2021 inflation-adjusted dollars for 2023), of which the Napa city economy contributes approximately 68.4% of the total economic output.

Napa (city) Gross Regional Product (2023)



Source: Bureau of Economic Analysis, California EDD, EMSI (Lightcast)

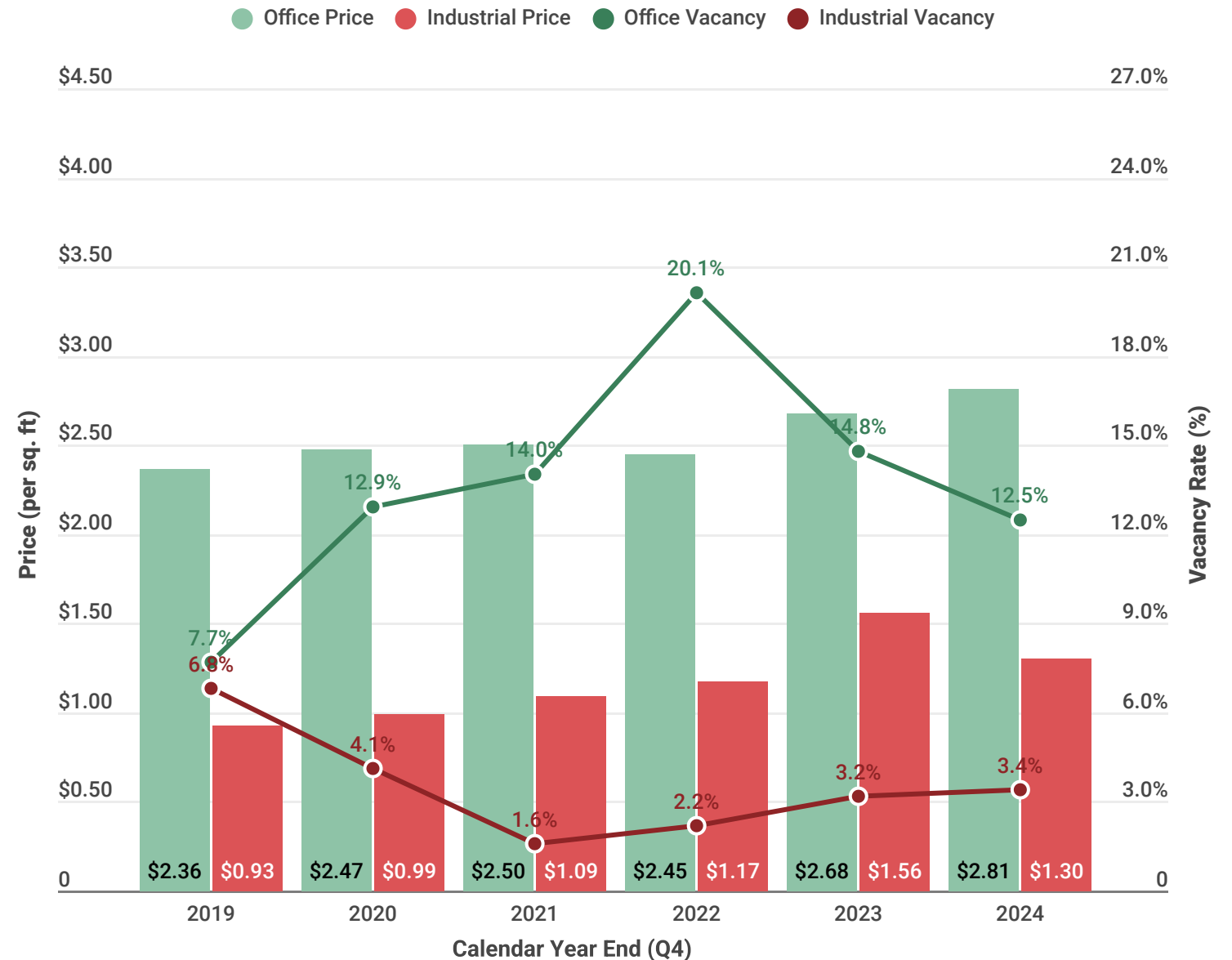
Commercial Real Estate Summary

Takeaway: The vacancy rate for office was significantly affected due to COVID-19, with an all-time high of 20.1% vacancy rate, and has dropped to 12.5% in 2024. Conversely, the vacancy rate for industrial dropped during COVID-19 and remains well below 2019, indicating a strong market need for industrial space. Despite a high vacancy rate, the price per square foot for office has steadily increased from \$2.36 in 2019 to \$2.81 in 2024. Price for industrial has remained much lower than office and has also steadily increased from \$0.93 in 2019 to \$1.30 in 2024.

The trends in the chart suggest that the vacancy rate for office will continue to decrease, while the vacancy rate for industrial stays consistent around 3%. Price per square foot for both office and industrial will likely continue to have a modest increase.

Description: The chart (right) shows the relationship between the price per square foot of office and industrial commercial real estate compared to the vacancy rate of each.

Commercial Real Estate Summary (2019-24)



Source: Keegan and Coppin (industrial); Colliers (office)

Visitor and Tourism Trends

Takeaway: We consider six-month moving averages for hotel occupancy and average daily rates (ADR). As of April 2025, occupancy rates increased (0.8 percentage points) compared to April 2024, despite some broader travel reactions to new federal trade policies. Average daily rates in Napa increased approximately \$9.70 per night, comparing the six-month moving average ending in April 2025 (\$353.80) to April 2024 (\$344.10). Occupancy rates in 2025 so far show visitors are still coming to Napa. New trade policies may affect local wineries, restaurants, and retailers as 2025 progresses toward and beyond the summer travel season. The latest data are as of May 2025.

Description: Occupancy rates measure how full hotels and lodging are during a particular time. This helps indicate the visitor activity for overnight stays and informs the Transient Occupancy Tax (TOT) revenue forecast. The average daily rate (ADR) refers to the average cost of a one-night stay. Using six-month moving averages reduces seasonal and episodic reasons for changes in these data and focuses more on trends.

**Hotel Occupancy Rate (Occ) and Average Daily Rate (ADR) in Dollars for
6 Month Moving Average (2022-2025)**



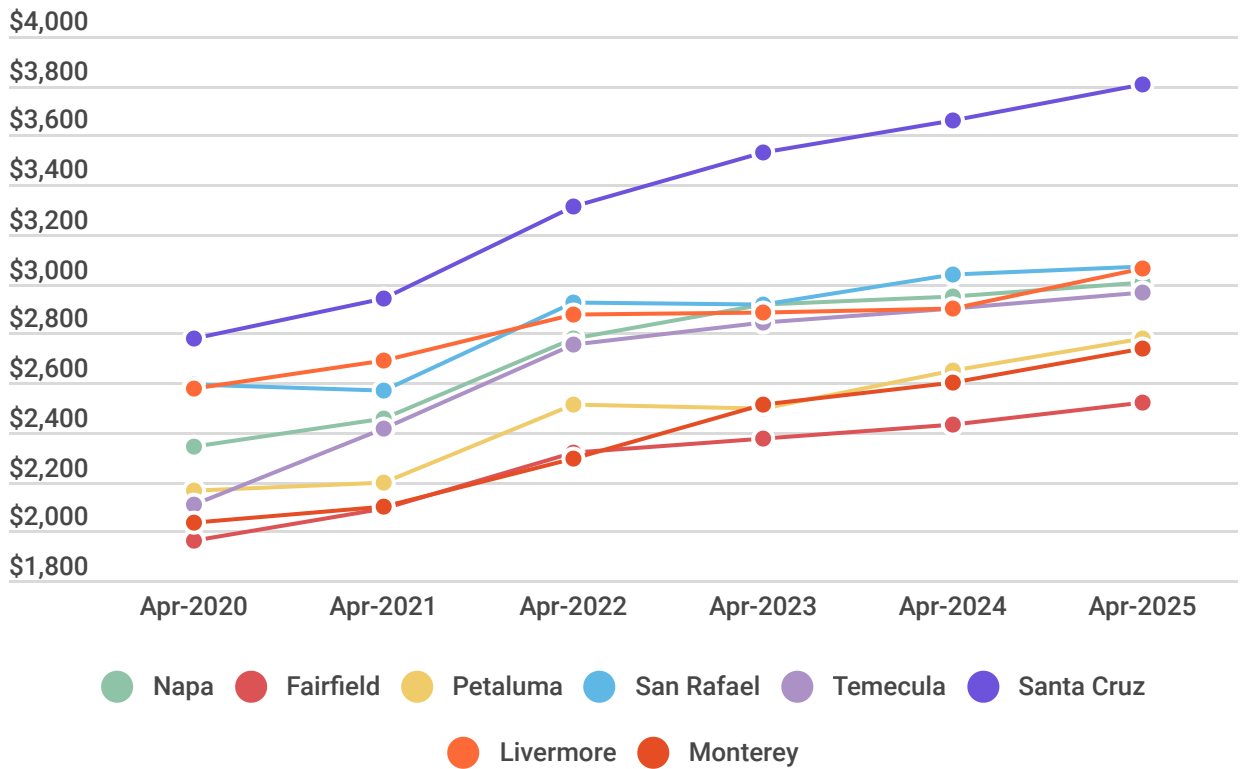
Source: Smith Travel Research

Median Rent Comparisons

Takeaway: Median rents increased 1.9 percent in Napa, according to Zillow™ Research, between April 2024 and April 2025. Home rental prices continue to rise across the region. Livermore and Monterey increased by more than five percent over the last year, while Monterey's price increase in dollars is similar to that of the city of Napa since April 2020. The latest data are from May 2025.

Description: The chart and table provide benchmarks for rental affordability in the Napa housing market. Comparison jurisdictions were chosen due to their similar population size, being a tourism destination, and/or being within a wine region. The rental price medians are calculated using samples of homes, condos, and apartments for rent, but they are primarily dominated by one- and two-bedroom apartments.

Median Rents by Year and Jurisdiction (2020-2025)



Place	Apr-2020	Apr-2021	Apr-2022	Apr-2023	Apr-2024	Apr-2025	Change
Napa	\$2,341	\$2,452	\$2,777	\$2,915	\$2,947	\$3,004	1.9%
Fairfield	\$1,964	\$2,095	\$2,319	\$2,372	\$2,432	\$2,523	3.7%
Petaluma	\$2,164	\$2,198	\$2,514	\$2,495	\$2,653	\$2,780	4.8%
San Rafael	\$2,595	\$2,571	\$2,923	\$2,915	\$3,038	\$3,072	1.1%
Temecula	\$2,110	\$2,412	\$2,758	\$2,845	\$2,897	\$2,961	2.2%
Santa Cruz	\$2,775	\$2,940	\$3,310	\$3,528	\$3,661	\$3,802	3.9%
Livermore	\$2,577	\$2,690	\$2,872	\$2,880	\$2,898	\$3,058	5.5%
Monterey	\$2,036	\$2,098	\$2,295	\$2,510	\$2,598	\$2,736	5.3%
Napa County	\$2,390	\$2,508	\$2,815	\$2,952	\$2,980	\$2,998	0.6%

Source: Zillow™ Research (2020-2025). Current dollars.