

Economic Development Dashboard


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





CITY OF NAPA


CITY OF NAPA ECONOMIC DEVELOPMENT

The City's Economy at a Glance


- 


\$432
Hotel Average Daily Rate
(Dec. 2024, 6 Month Moving Average)
- 


65.2%
Hotel Occupancy Rate
(Dec. 2024, 6 Month Moving Average)
- 


+1.7%
Hotel Occupancy Rate past year difference (Dec. 2023 - Dec. 2024)
- 

+1.2%
Hotel Occupancy Rate past two year difference (Dec. 2022 - Dec. 2024)


- 


\$7.48 Billion
City of Napa Gross Regional Product Economic Output (2023 est.)
- 


-6.0%
City of Napa Taxable Sales Percent Increase (2023 Q3 to 2024 Q3)
- 


-4.6%
Napa County Taxable Sales Percent Increase (2023 Q3 to 2024 Q3)
- 

-3.2%
California Taxable Sales Percent Increase (2023 Q3 to 2024 Q3)

- 

\$879,260
Median home price within the City as of Dec. 2024 (Zillow Research)
- 

-0.2%
City of Napa one year home price growth rate (Dec. 2023 - Dec. 2024)
- 

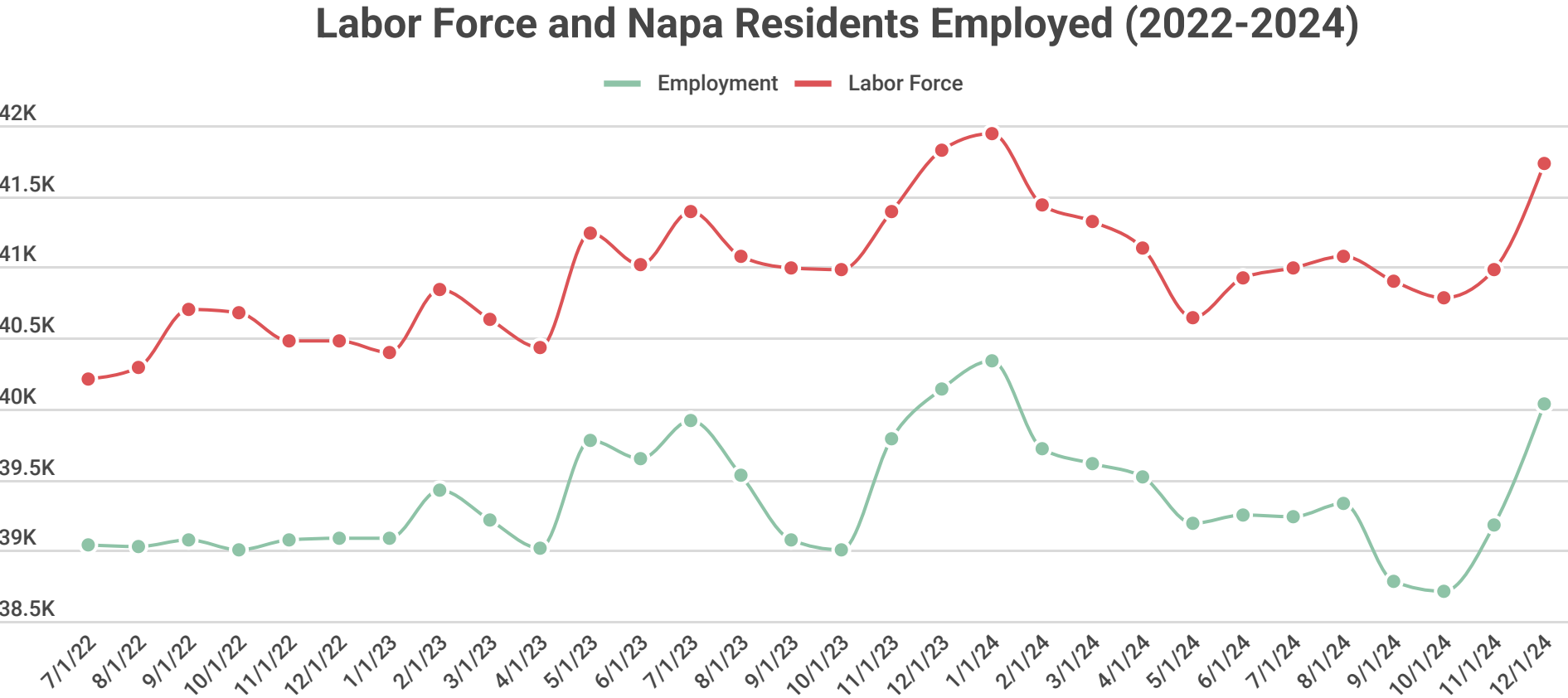
+2.9%
City of Napa two year home price growth rate (Dec. 2022 - Dec. 2024)
- 

+0.3%
City of Napa Housing Market Forecast (% change in median home price) to Jan 2026

Labor Force and Employment

Takeaway: Napa's labor force increased from Q4 2023 to Q4 2024. Rising wages and continued job openings are likely causes. Napa's employed residents increased in Q4 2024 as well, pushing Napa's unemployment rate to 4.1% after seasonal adjustments as of December 2024, a quick reversal from September 2024 when unemployment was slightly above five percent. New employers in Napa also help create such changes. The latest data are from December 2024.

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

4.1%

Dec. 2024

4.1%

Dec. 2023

3.4%

Dec. 2022

4.3%

Dec. 2021

8.2%

Dec. 2020

2.9%

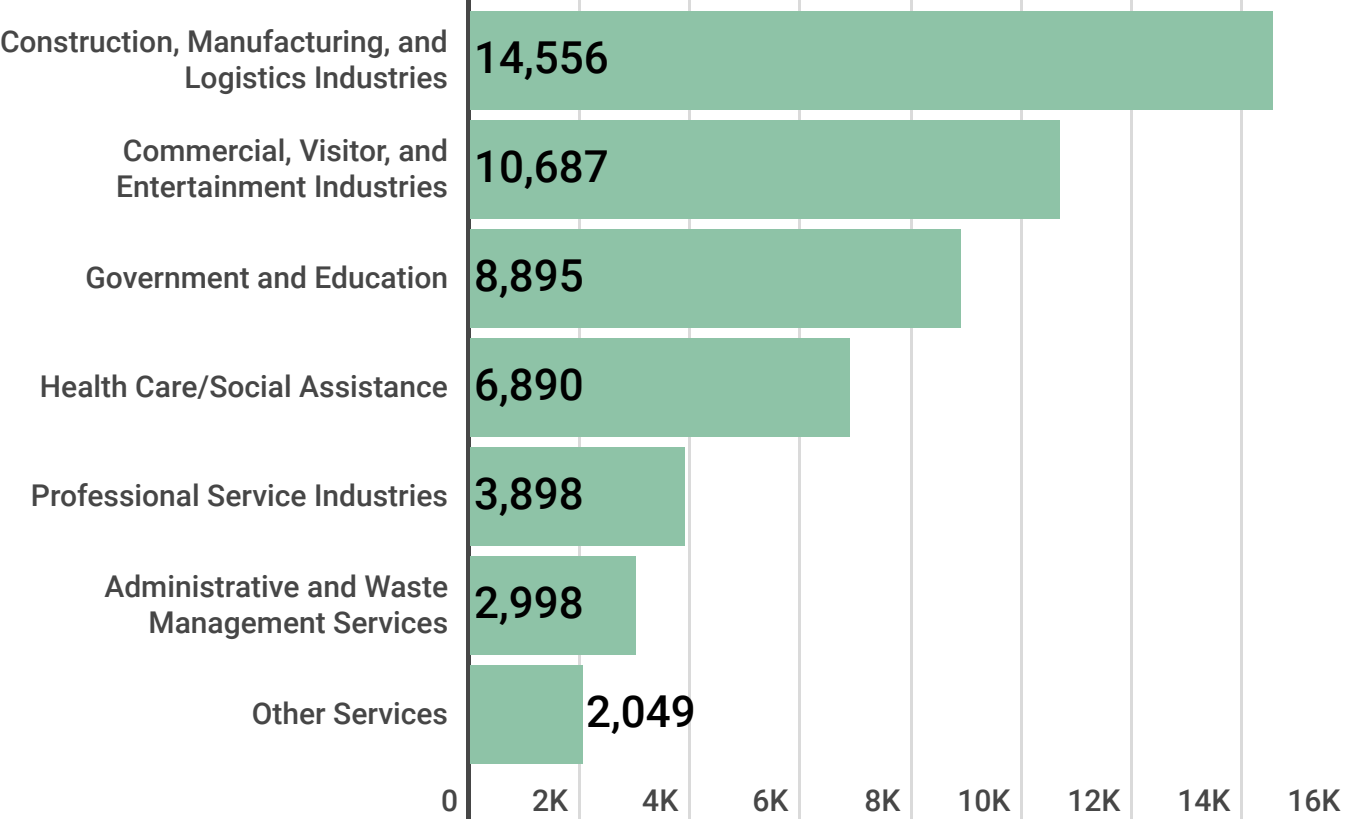
Dec. 2019

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 (included 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

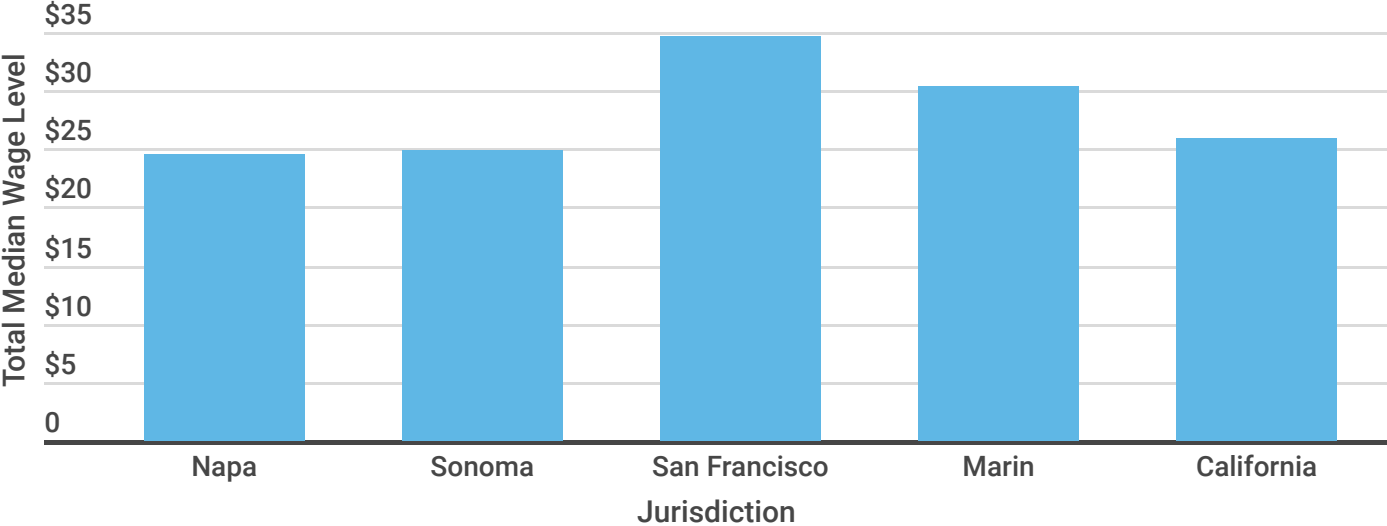
Source: California EDD, Census Bureau, EMSI (Lightcast)

Median Wages by Occupation

Takeaway: The median wage for jobs worked in 2024 within the City of Napa is \$24.62 for all industries combined (+\$0.62 from 2023), where the median in Sonoma is \$24.84, San Francisco's metropolitan area (including Alameda and San Mateo counties) is \$34.64, and California is \$25.98 (the 2024 data are not yet available for San Francisco city and county alone or Marin County as of June 1, 2024). These data indicate that overall wages in Napa are competitive with those in adjacent Sonoma County and have slowed compared to those in California. For Napa, healthcare and protective services jobs had more than a 10% wage increase since 2023. Napa as a city economy is a significant portion of Napa County's labor market in terms of jobs available and a wide breadth of positions.

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

Median Wages by Occupation (2024)



Occupation Type	Napa	Sonoma	SF	Marin	CA
Management	\$59.43	\$57.37	\$82.38	\$67.63	\$65.31
Business and Financial Operations	\$39.96	\$39.42	\$50.46	\$47.52	\$42.25
Computer and Mathematical	\$48.24	\$49.04	\$78.79	\$66.43	\$65.27
Architecture and Engineering	\$47.59	\$52.13	\$60.73	\$52.95	\$52.24
Life, Physical, and Social Science	\$34.55	\$40.94	\$57.86	\$52.32	\$46.55
Community and Social Service	\$32.81	\$28.82	\$31.17	\$33.69	\$28.95
Legal	\$53.00	\$50.32	\$76.16	\$71.38	\$62.91
Educational Instruction and Library	\$35.19	\$32.31	\$36.12	\$36.75	\$33.17
Arts, Design, Entertainment, Sports, and Media	\$30.00	\$29.50	\$43.70	\$37.98	\$36.55
Healthcare Practitioners and Technical	\$60.13	\$57.91	\$66.99	\$66.62	\$53.61
Healthcare Support	\$18.84	\$18.46	\$16.58	\$21.37	\$16.65
Protective Service	\$26.20	\$23.70	\$27.04	\$44.27	\$23.74

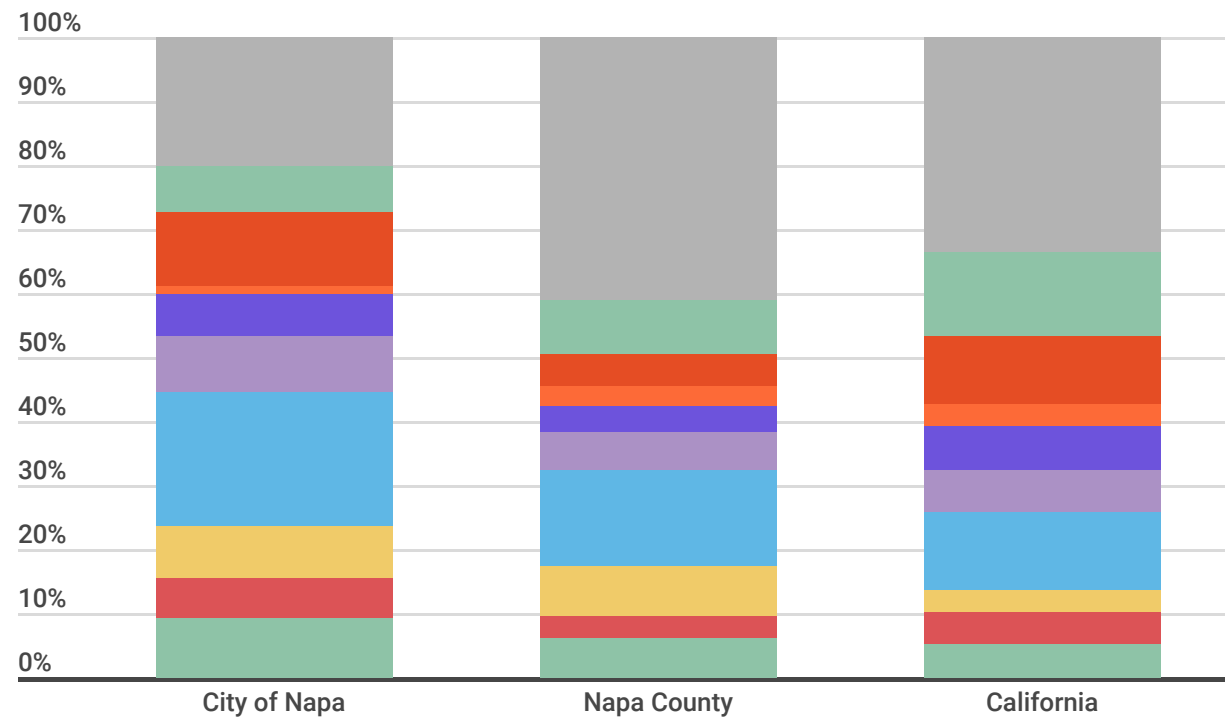
Source: California EDD and Bureau of Labor Statistics (2024).

Taxable Sales

Takeaway: The total taxable sales of all retail categories in Napa was \$459 million in Q3 2024, a 6.0% decrease from Q3 2023. However, for the 12 months ending on September 30, 2024, the annualized change from September 30, 2023 was -1.7 percent. The top retail sector is restaurants and bars (Food Services and Drinking Places) in Q3 2024 at 21.0 percent (\$91.1 million) followed by vehicle and parts sales at 11.6 percent (\$50.2 million). The All-Other Outlets category includes an array of businesses with retail points of sale but is not a retail business as a primary function (winery tasting rooms are examples) at 20.1 percent (\$87.2 million) of taxable sales. Napa County taxable sales fell by 4.6 percent overall, while California slipped by 3.2 percent. The latest data are from January 2025.

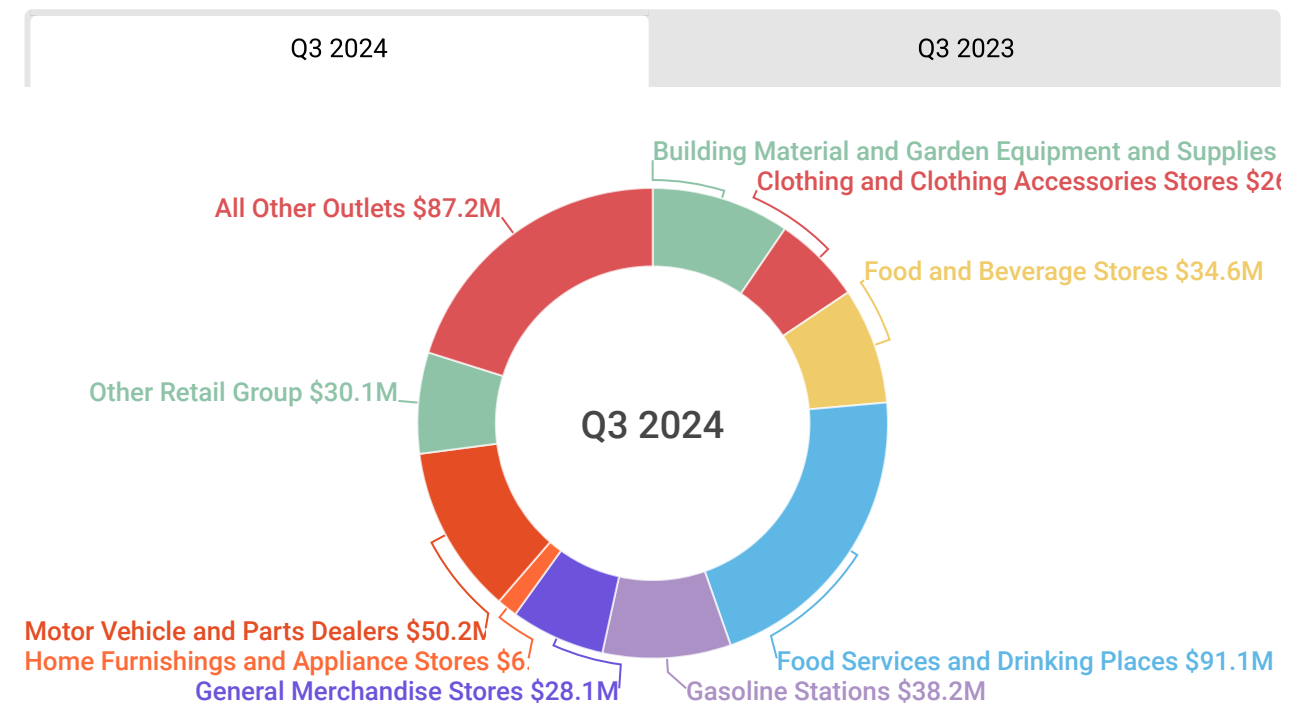
Description: The charts below summarize the composition of taxable sales to track business health, which forms the basis of revenue and sales tax revenue generated for the City.

Composition of Taxable Sales (Q3 2024)



Source: California Department of Tax and Fee Administration

Comparison of city of Napa Taxable Sales by Major Retail Category (Q3 2023, Q3 2024)



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 Q4 2024 have outpaced the number of closed licenses. Service businesses made up the majority of the new starts and closures, indicating the swing of these business types as compared to retail, food, and beauty. There was three tasting room/wine sales license closure and no new accommodation starts.

Description: The table below illustrates the number of businesses located inside the City limits that either (1) applied for a new business license with a start date or (2) closed out a license between October 1, 2024 and December 31, 2024. Business Category is an agglomeration of business types.

Open and Closed Business Licenses (Q4 2024)

Business Category	Number of New Starts	Number of Closed	Difference
Accommodation	0	0	0
Retail	18	11	7
Restaurant/Bar/Food	10	8	2
Art/Entertainment	7	5	2
Beauty/Massage	15	5	10
Services	69	59	10
Tasting Room/Wine Sales	0	3	-3
Manufacturing/Wine Production	1	0	1
Q4 Total:	120	91	29
Year to Date (2024):	605	206	399

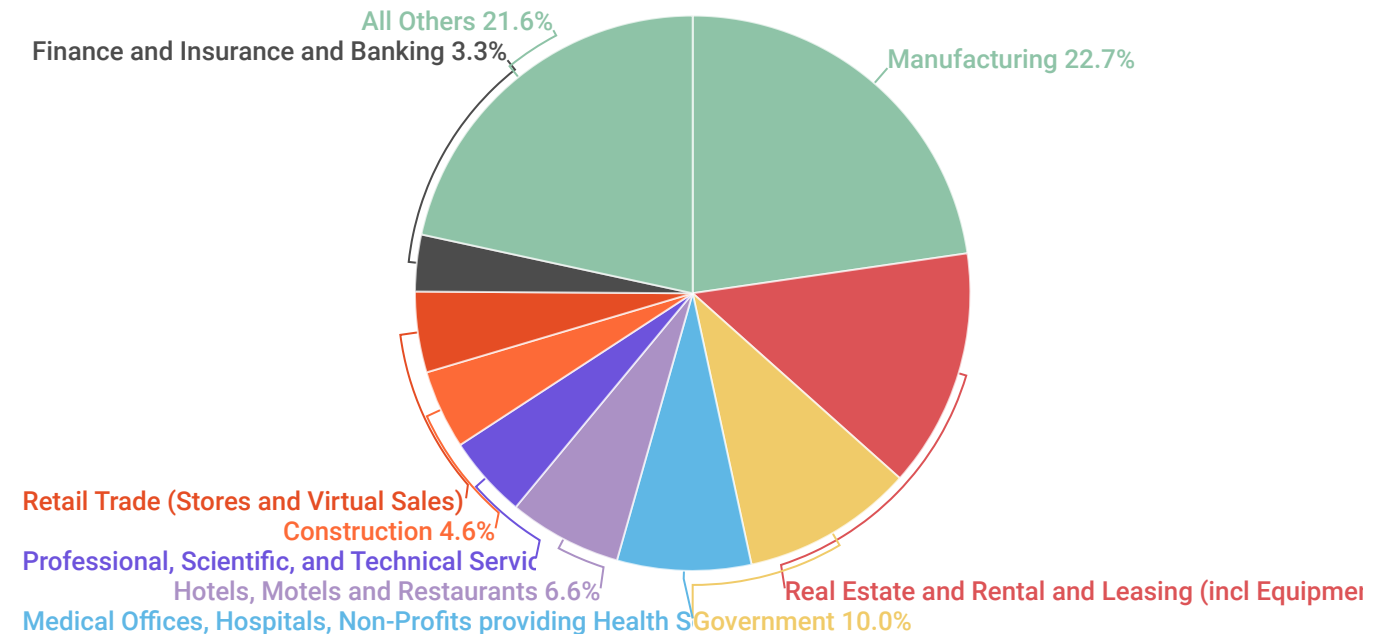
Source: HdL

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)



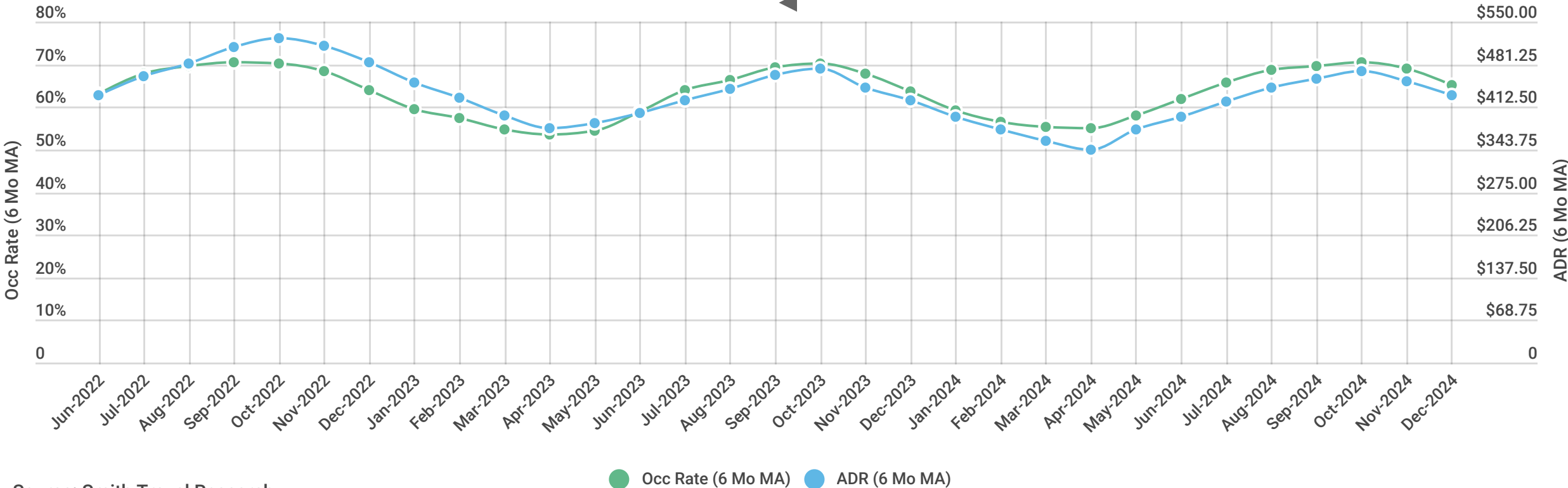
Source: Bureau of Economic Analysis, California EDD, EMSI (Lightcast)

Visitor and Tourism Trends

Takeaway: We consider six-month moving averages for hotel occupancy and average daily rates (ADR). As of December 2024, occupancy rates increased (1.7 percentage points) compared to December 2023. Average daily rates in Napa increased approximately \$9 per night, comparing the six-month moving average ending in December 2023 (\$423) to December 2024 (\$432). The six-month moving average is meant to flatten some of the seasonal and episodic reasons for changes in these data and focus more on trends. Occupancy rates in 2024 showed better-than-expected change, as consumer and economic confidence remained in place with no regional fires or other disasters. Regional competition continues to strengthen, especially in Sonoma and San Francisco counties. The latest data are as of February 2025.

Description: Occupancy rates measure how full hotels and lodging are during a particular time. This helps indicate the amount of 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. We use a six-month average to show more trends than episodic changes.

Hotel Occupancy Rate (Occ) and Average Daily Rate (ADR) in Dollars for 6 Month Moving Average (2022-2024)



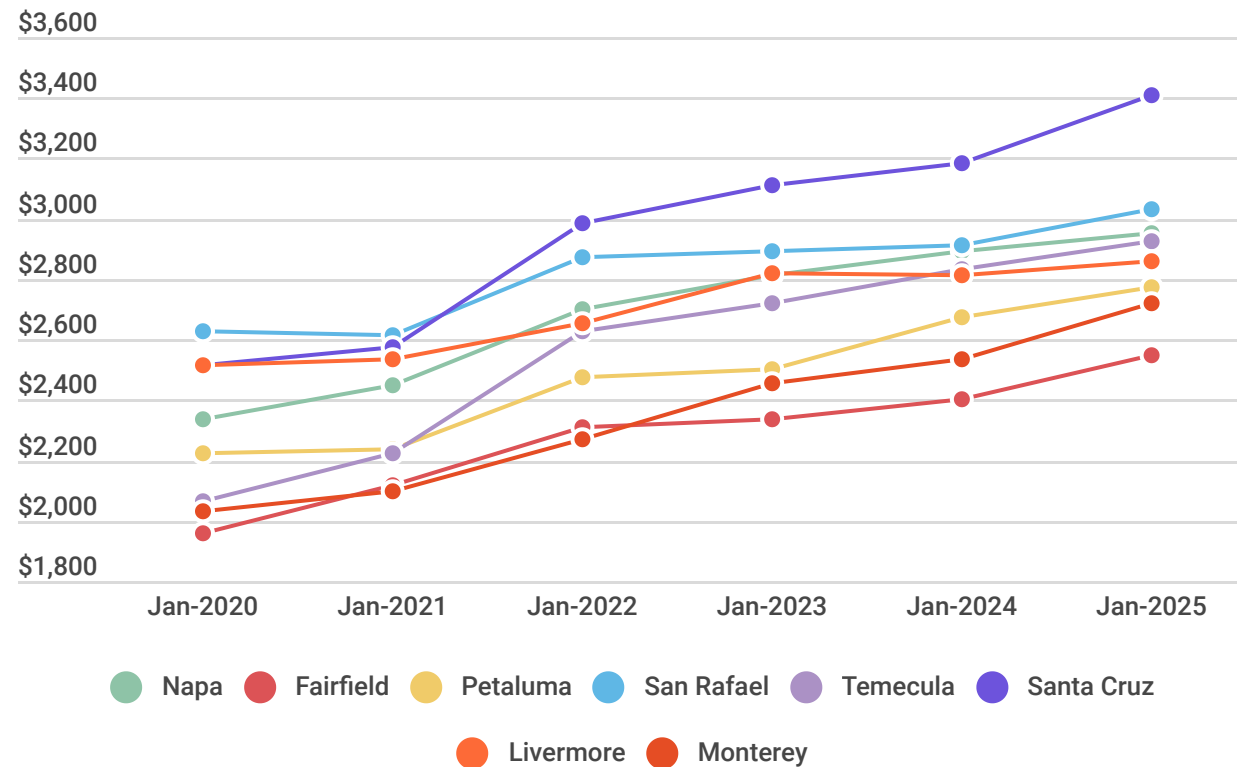
Source: Smith Travel Research

Median Rent Comparisons

Takeaway: Median rents increased 2.0 percent in Napa, according to Zillow™ Research, between January 2024 and January 2025. That slower pace of rent increasing is a microcosm of regional changes. Comparable jurisdictions increased by 1.6 percent in Livermore to 7.5 percent in Monterey. Fairfield saw rents rise by 6.2 percent over that same time period. The latest data are from February 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 largely dominated by one—and two-bedroom apartments.

Median Rents by Year and Jurisdiction (2020-2025)



Place	Jan-2020	Jan-2021	Jan-2022	Jan-2023	Jan-2024	Jan-2025	Change
Napa	\$2,334	\$2,450	\$2,697	\$2,815	\$2,890	\$2,949	2.0%
Fairfield	\$1,960	\$2,117	\$2,312	\$2,335	\$2,399	\$2,548	6.2%
Petaluma	\$2,221	\$2,234	\$2,474	\$2,499	\$2,674	\$2,772	3.7%
San Rafael	\$2,629	\$2,611	\$2,872	\$2,894	\$2,915	\$3,030	3.9%
Temecula	\$2,065	\$2,226	\$2,626	\$2,719	\$2,834	\$2,928	3.3%
Santa Cruz	\$2,518	\$2,576	\$2,986	\$3,113	\$3,180	\$3,408	7.2%
Livermore	\$2,518	\$2,533	\$2,656	\$2,821	\$2,813	\$2,858	1.6%
Monterey	\$2,032	\$2,095	\$2,268	\$2,456	\$2,533	\$2,723	7.5%
Napa County	\$2,411	\$2,572	\$2,771	\$2,883	\$2,930	\$3,011	2.8%

Source: Zillow™ Research (2020-2024). Current dollars.

Looking for more data?

Click below to visit the California Governor's Office of Business and Economic Development (Go-Biz) for an interactive map of Napa.

The screenshot displays the Go-Biz website interface for Napa, California. The top navigation bar includes 'State of California', 'EXPLORE COMMUNITIES', 'COMPARE COMMUNITIES', 'Opportunity Zones', 'CalEnviroscreen', and 'GO-Biz'. Below this, a secondary navigation bar features icons for 'Summary', 'Demographics', 'Occupation Data', 'Establishments', 'Consumer Expenditures', 'Business', and 'Talent', along with a 'Saved Results' counter showing 0.

The main content area is titled 'Napa (Change Location)' and 'Napa, California - Compare Community'. It includes a 'Back' button, 'PDF' and 'Share' options, and an 'Expand Map' button. The 'People' section provides demographic information: 'The total population of Napa is 78,495. The median age is 39.31'. A large orange number '78,495' represents the 'Total Population'. Below this, a horizontal bar chart shows the gender distribution: 49.49% Male (represented by a blue icon) and 50.51% Female (represented by an orange icon). The 'Age Distribution' section is partially visible at the bottom left.

The right side of the interface features an interactive map of Napa and surrounding areas, including Oak Knoll, Salvador, Union, Napa, Inola, Rockram, Thompson, Merazo, and Napa County Airport. The map is overlaid with a blue outline of the city boundary. Map controls include 'Map Layers', 'Map', 'Satellite', 'Map Tools' (Pinpoint, Measure, By Address, Filter: Area, Map Styles, Export), and zoom in/out buttons. The bottom of the map area includes 'Keyboard shortcuts', 'Map data ©2022 Google', 'Terms of Use', and 'Report a map error'.