



Great Wine
Capitals

GLOBAL NETWORK

A WORLD OF EXCELLENCE

Annual Recap For Napa County

January 24, 2023



What is Great Wine Capitals?

- The Great Wine Capitals is a network of major global cities in both the northern and southern hemispheres that are **internationally known for their wine regions**.
- The Great Wine Capitals network **facilitates tourism, education, and business exchanges** among the prestigious wine regions of the world.
- **Napa Valley is one just 11 regions, worldwide, and the only Great Wine Capital in North America.**
- Through this prestigious network, Napa County officials, wine and hospitality businesses benefit from the exchange of information and real-life experience on shared issues such as **drought, pest management, sustainability best practices, wildfire, smoke taint, tourism volumes, name protection, and pandemic response**.





Great Wine Capitals Working Groups;

Collaborating Throughout the Year; Meeting 4-6x Per Group

- **Executive Committee & Elected Officials Collaboration Committee:** Napa County Supervisor Alfredo Pedroza
- **Internal Collaboration:** Napa Valley Vintners President & CEO Linda Reiff
- **Membership:** Visit Napa Valley President & CEO Linsey Gallagher
- **Activities & Partnerships:** Napa Valley Vintners Vice President of Marketing Stacey Dolan Capitani
- **Brand & Communications:** Visit Napa Valley Director of Communications Sarah Gillihan
- **Local Coordinator:** Visit Napa Valley Director of Communications Sarah Gillihan



Napa Valley Great Wine Capitals Delegation - Partnership & Collaboration Across Industry & Government

Napa County

- Supervisor Alfredo Pedroza (Executive Committee)
- Supervisor Ryan Gregory
- Agricultural Commissioner Tracy Cleveland

Visit Napa Valley

- President & CEO Linsey Gallagher
- Director of Communications Sarah Gillihan

Napa Valley Vintners

- President & CEO Linda Reiff
- Vice President of Marketing Stacey Dolan Capitani



Executive Committee

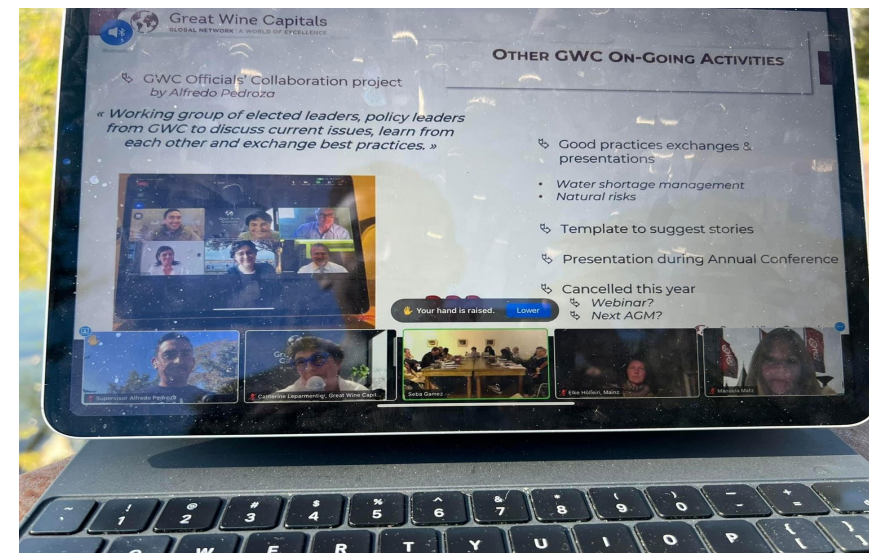
- Budget Approval
- New Members
 - Discussion on Hawkes Bay, New Zealand
- Relaunch of GWC International Research Grant
 - Supports research in GWC Regions
- AGM Conference & Potential Webinars
 - Committee Priorities & Deliverables
 - Connecting businesses across GWC





Elected Officials Collaboration

- Chair, “Elected Officials Committee”
 - Met July 2022, Kickoff Meeting
 - Purpose: Collaborate with elected leaders from other GWC regions
- Priority Setting
 - Local water shortage, natural risks prevention
 - Each GWC presents best practices, case studies
- Interested Participating Members
 - Porto, Cape, Winelands, Mainz, Adelaide, Napa Valley





GWC Annual General Meeting October 30 - November 3 Mendoza, Argentina





Annual General Meeting Attendees

- Napa County Supervisor Alfredo Pedroza (Virtual)
- Napa County Supervisor Ryan Gregory
- Napa County Ag Commissioner Tracy Cleveland
- Sarah Gillihan, Visit Napa Valley
- Tom Davies, Board Chair, Visit Napa Valley;
President, V. Sattui Winery





Theme: Water, Sustainability, & Business Trends

- Executive Committee Annual Budgeting & Strategy Sessions
- Committee Break Out Sessions
- Civic & Winery Tours
- Great Wine Capitals Wine Tasting
- Conference Speakers
- Cultural Experiences
- Awards & Recognition



Agenda



Annual General Meeting Key Takeaways

- Remarkably Common Experiences of the Pandemic & Other Challenges, Including Wildfire, Smoke Taint, Drought, Pests, Name Protection, Visitor Trends.
- Importance of Government & Business Working Together; 1+1=3
- Success (And Maturity) of Wine Tourism Worldwide
- Interconnected Nature of Wine Tourism Destinations & Consumer Demographics
- Building & Strengthening of Relationships (Abroad & At Home)

Other Insights

Worldwide Wine Marketing Trends

Mendoza's Water System



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Mendoza's Water System

- Water management in Mendoza is projected as an integral water system that fulfills all uses (human, agriculture, industrial, ecological).
- However, vineyard development model established in the 19th century says water is prioritized for agricultural irrigation.
- This model, oriented to grape production, shaped the water management system in Mendoza and still continues today.



Mendoza's Water System

Irrigation water delivered by ditches and canals

Release every 7-10 days

Floodgates are manually opened and closed all over Mendoza so that water reaches all the irrigators.

Groundwater wells are largely reserved for domestic and other non-irrigation consumption.



Mendoza's Water System

Main components of water system

- Potrerillos Dam
- Cipolletti Dam
- Ditches and canals
- Groundwater wells



Mendoza's Water System

- System is run by General Dept. of Irrigation; Superintendent and Local Inspectors are elected
- Efforts underway to update system with closed pipelines and convert to drip irrigation
- But, system is well-managed and expectations are clear amongst water users.





7 Key Trends

Lockshin and Corsi (2020)

Post-pandemic growth of DTC

Main Indicators (Q1 - Q2) - US

Main Indicators	2022 vs 2021
Net Sales Growth	10.0% ↑
Cases Sold Growth	-2.2% ↓
Wine Club Growth Jul-21 - Jun-22	7.4% ↑
Unique Customers	3.4% ↑

Australia

Main Indicators (Q1 - Q2) - AU

Main Indicators	2022 vs 2021
Net Sales Growth	12.5% ↑
Cases Sold Growth	15.6% ↑
Wine Club Growth Jul-21 - Jun-22	71.8% ↑
Unique Customers	18.3% ↑

Main Indicators (Q1 - Q2) - CA

Main Indicators	2022 vs 2021
Net Sales Growth	14.4% ↑
Cases Sold Growth	5.9% ↑
Wine Club Growth Jul-21 - Jun-22	9.1% ↑
Unique Customers	0.5% ↑

Wine Direct (2022)

Strengthening the connection with the food sector



TERRA MADRE
SALONE DEL GUSTO

#TerraMadre #SlowFoodForChange
OUR FOOD PLANET FUTURE



Annual General Meeting 2022

Photo Album



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Annual General Meeting 2023

Lausanne, Switzerland



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2023 Great Wine Capitals Annual Meeting





Lausanne, Switzerland; Similar to Napa

- Rural, Four-Season Destination
- Boutique (Small) Accommodations and Experiences
- Similar Experiences During Pandemic of Increase of Regional Urban Visitors to the Destination
- Similar Delegation Composition of Wine, Tourism, Government, and Agriculture Represented



Thank you