

AIRPORT TRAFFIC, JANUARY 2026



1.3M arrivals

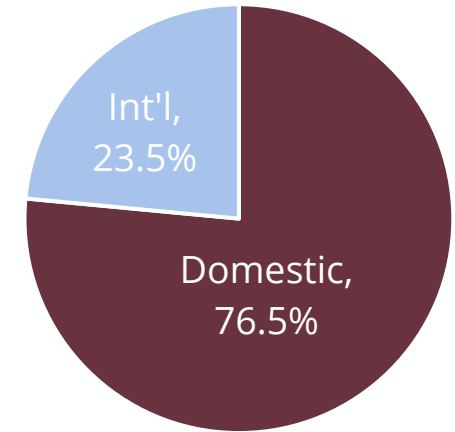
Domestic = 1.0M

International = 0.3M

+1.6% YOY

Domestic = +4.1%

International = -5.7%



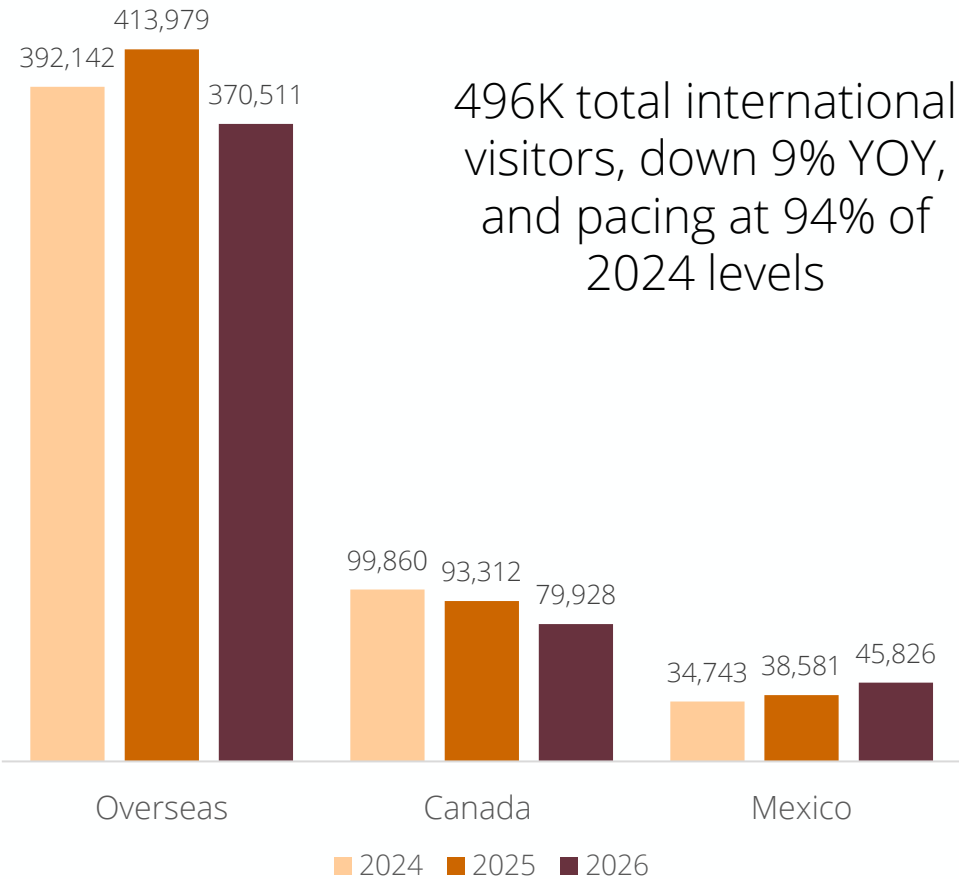
Top Origin Markets

Los Angeles ♦ San Diego ♦ New York ♦ Seattle ♦ Las Vegas ♦ Chicago ♦ Denver ♦ Newark ♦ Boston ♦ Phoenix

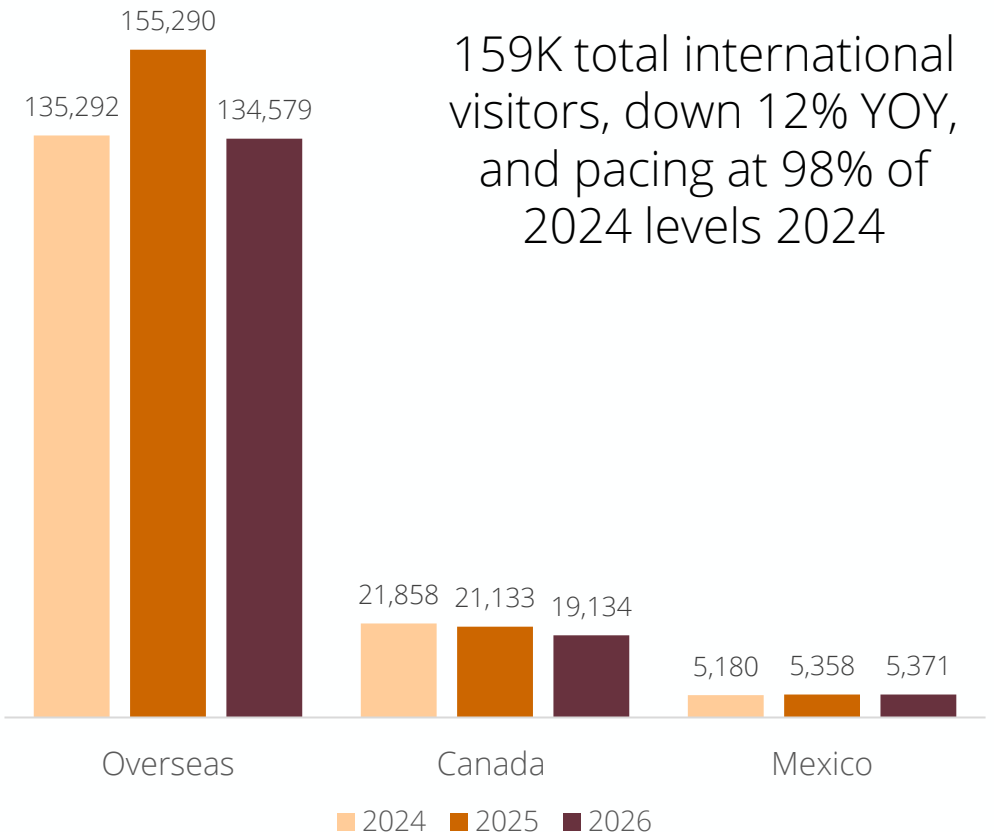
INTERNATIONAL AIR ARRIVALS, JAN 2026



CALIFORNIA



SAN FRANCISCO

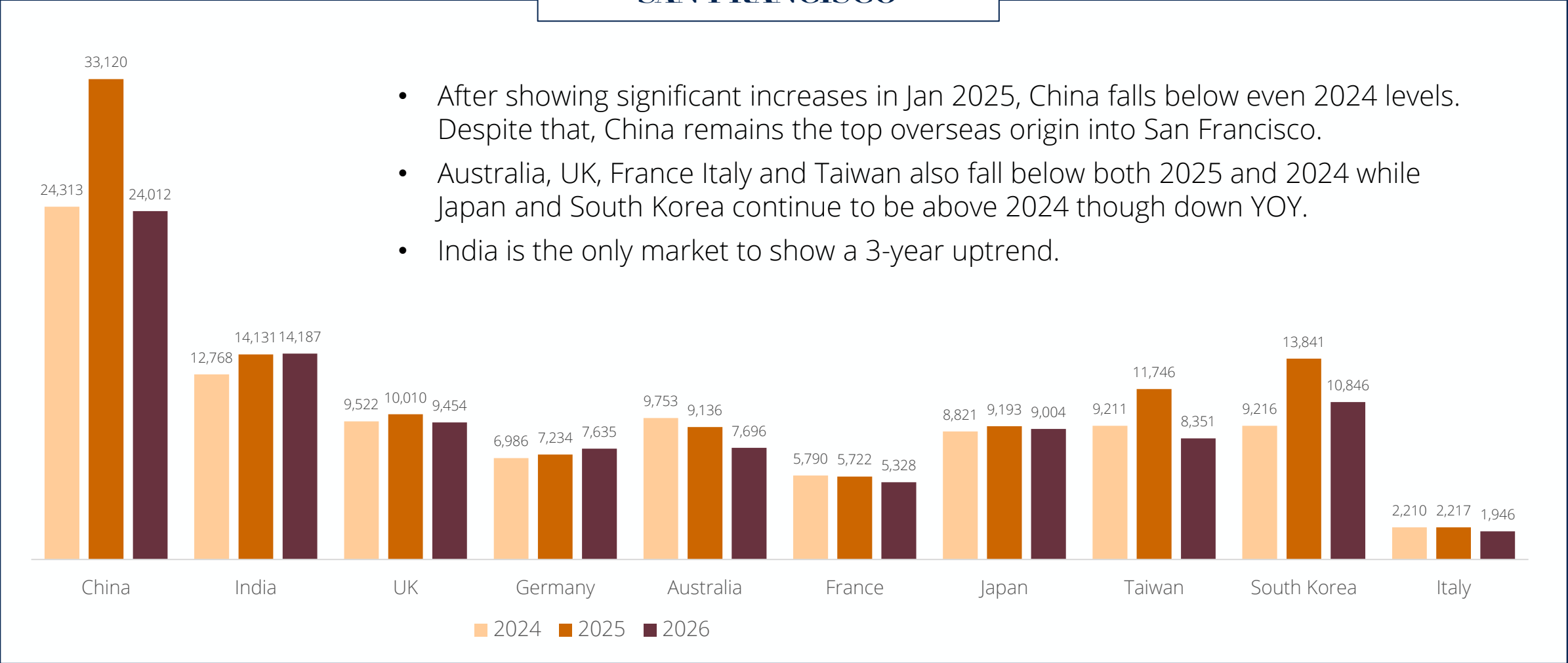


TOP 10 OVERSEAS ARRIVALS, JAN 2026



SAN FRANCISCO

- After showing significant increases in Jan 2025, China falls below even 2024 levels. Despite that, China remains the top overseas origin into San Francisco.
- Australia, UK, France Italy and Taiwan also fall below both 2025 and 2024 while Japan and South Korea continue to be above 2024 though down YOY.
- India is the only market to show a 3-year uptrend.



Source: US Dept of Commerce, National Travel & Tourism Office (NTTO)

VISITOR ORIGINS: YTD DECEMBER 2025



DOMESTIC

Per POI Data:

BAY AREA/SACRAMENTO = **71%**

REMAINING CALIFORNIA = **12%**

OUT-OF-STATE = **17%**



= markets targeted by VNV paid campaigns

INTERNATIONAL

2026

2025



6.5 DAYS

5.7 DAYS

Avg. Length of Stay

Napa Valley Welcome Center has greeted visitors from:

Canada

Mexico

Argentina

Brazil

Germany

China

Italy

UK

South Korea

Australia

Taiwan

Japan