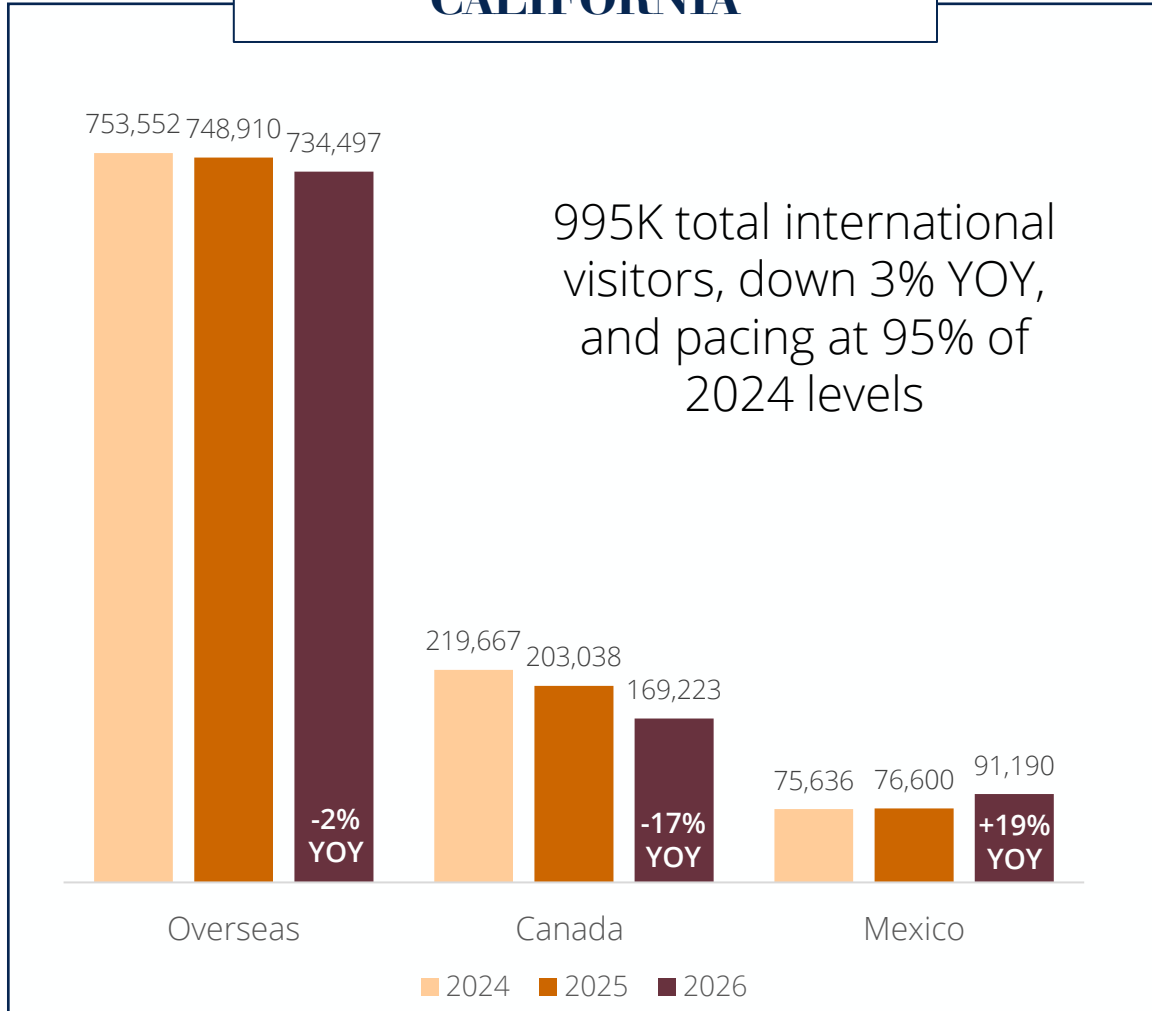


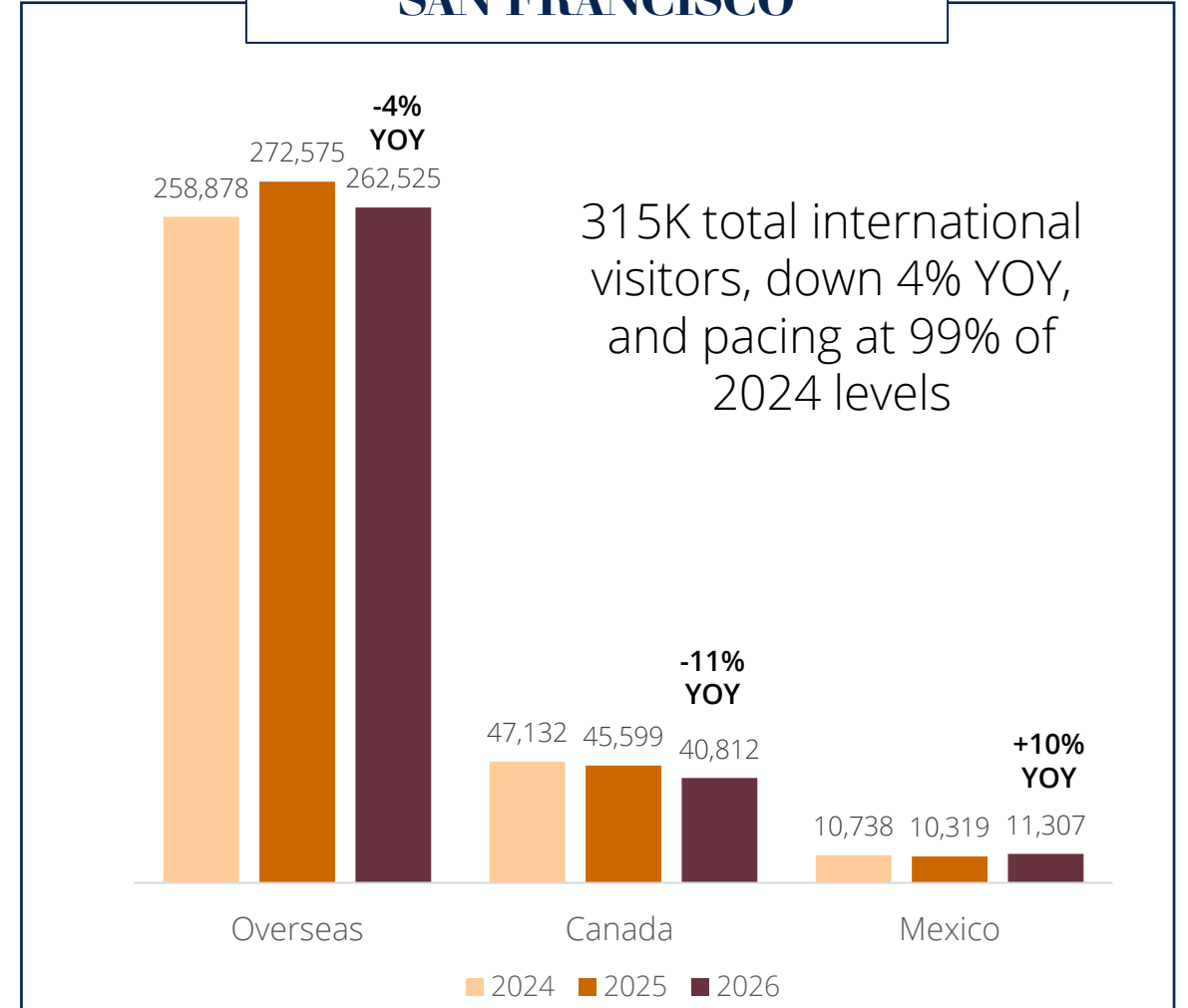
# INTERNATIONAL AIR ARRIVALS, JAN/FEB 2026



## CALIFORNIA



## SAN FRANCISCO

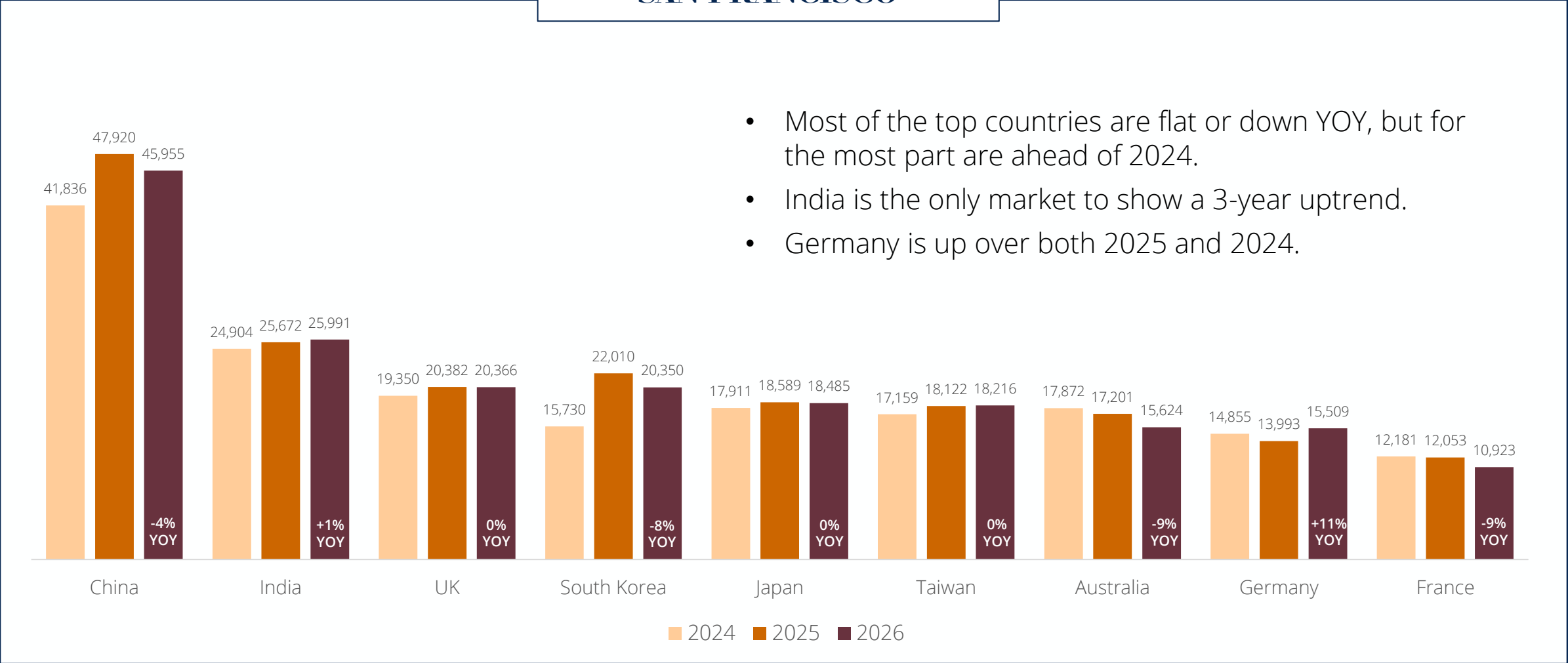


# TOP OVERSEAS ARRIVALS, JAN/FEB 2026



## SAN FRANCISCO

- Most of the top countries are flat or down YOY, but for the most part are ahead of 2024.
- India is the only market to show a 3-year uptrend.
- Germany is up over both 2025 and 2024.



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

# DOMESTIC ORIGINS: JANUARY-MARCH 2026



## Takeaway:

Per Point-Of-Interest Location Data:

BAY AREA/SACRAMENTO = **60%**

REMAINING CALIFORNIA = **11%**

OUT-OF-STATE = **29%**

Compared to the same period in 2025, we saw more visitors from out-of-state, possibly related to Super Bowl



= markets targeted by VNV paid campaigns

# FEBRUARY 2026 IN-MARKET VISITOR SPENDING



# \$28.6M

## Credit Card Spend

+11.1%  
vs Feb 2025

+13.5%  
vs Jan 2026

- Spending increased 11% YOY reflected not only in more visitors (cardholders), but in the number of transactions and their amounts.
- Out of state visitors spend double that of drive-market visitors.



## 111.2K

Cardholders  
+5.2% YOY



## 283.7K

Transactions  
+3.3% YOY



## \$257

Cardholder Average  
+5.6% YOY



## \$101

Transaction Average  
+7.6% YOY



### San Francisco Visitor

## \$86

Credit Card  
Transaction

## \$284

Tasting Room  
AOV



### New York Visitor

## \$178

Credit Card  
Transaction

## \$484

Tasting Room  
AOV