



Monthly Travel Indicators Summary

February 2025

March 28, 2025

About the Monthly Travel Indicators Summary

The Monthly Travel Indicators Summary is a summary compilation of key indicators and statistics from a variety of Visit California and third-party data sets for the reporting month, including:

Visit California Sources	Third Party Sources
AirDNA	Bureau of Labor Statistics (BLS)
CIC Research	Department of Homeland Security (DHS)
Cirium	Department of Labor
Future Partners	U.S. Energy Information Administration (EIA)
NTTO	University of Michigan
SMARInsights	
STR, Inc.	
Tourism Economics	
YouGov	

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Executive Summary Domestic

Forecast (updated February & March 2025)

Tourism Economics has released an updated national tourism outlook, leading to a downward revision in California's projected visitor spending for 2025. At the beginning of the year, spending was expected to grow by 6% compared to 2024. That year-over-year growth has now been revised down to just 2%. Visit California will update the full California forecast in May, incorporating the latest data and economic indicators.

Macroeconomic

U.S. economic indicators remained generally positive in February, with one key exception: consumer sentiment. Sentiment dropped sharply, falling 9% from January, as consumers' inflation expectations increased.

- Inflation increased by 2.8% in February, down from 3% prior month. The national average retail price for a gallon of gas was \$3.25 up from \$3.20 the previous month, while the average price in California stood at \$4.59.
- A preliminary estimate shows the U.S. economy added 151,000 jobs in February, while the unemployment rate ticked up slightly to 4.1%.
- The University of Michigan's U.S. Consumer Sentiment Index measured 64.7 for the month, down 9% from the 71.1 reading in January.

Consumer Sentiment

Despite negative consumer sentiment about the overall economy, travel sentiment remained positive in February—indicating that consumers still plan to prioritize leisure travel in their budgets. However, there is significant interest in international destinations, as more U.S. travelers look abroad for their vacations.

- Consumer tracking from Future Partners found that travel costs remained a top barrier to travel, with 33% of U.S. travelers indicating high costs deterred them from traveling. California residents were slightly more likely to cite travel costs (35%) and were more likely to identify gas prices and airfare as barriers compared to the U.S. overall.
- A third (33%) of American travelers felt optimistic about their current financial situation compared to a year ago, while California residents were slightly more optimistic at 38%. However, travelers expressed greater confidence in their future economic situation, with 46% of U.S. travelers and 50% of California residents expecting improvement.
- Excitement for future travel remained high, with 89% of U.S. travelers and 87% of California residents saying they were excited about leisure travel in the next 12 months.
- Additionally, 48% of American travelers and 63% of California travelers said they were considering international leisure travel within the next 12 months. Both rates increased significantly in February.

Executive Summary Domestic (continued)

Lodging

Lodging demand was a relative bright spot for the industry with 4% growth in February. Key performance indicators—including occupancy, average daily rate (ADR), and revenue per available room (RevPAR)—also outperformed both 2024 levels and national averages. While part of the strong growth is due to a soft Q1 in California last year, increased domestic visitation and continued recovery efforts following the LA wildfires are also driving positive momentum. Group demand saw particularly strong gains, with double-digit growth for the month.

- Hotel room demand in California grew by 4% year over year in February, while room revenue increased by 6%. Year to date, demand and revenue are up 4% and 7% respectively.
- The state's monthly occupancy rate reached 65% (+3% YOY), with an average daily rate (ADR) of \$186 (+3% YOY) and revenue per available room (RevPAR) of \$121 (+6% YOY).
- Group room demand increased by 12% compared to February 2024, while room revenue rose by an impressive 15%.
- For February, the occupancy rate for short-term vacation rentals in California stood at 53% (-2% YOY), with ADR rising 15%, leading to a 13% year-over-year increase in RevPAR to \$230.

Airlift

February showed some softness in air travel. National air passenger traffic, measured by TSA checkpoint counts, declined 3% year-over-year — the first drop in more than three years. Meanwhile, nonstop domestic seat capacity to California remained flat compared to February 2024.

- In total, 62.6 million passengers were screened at TSA checkpoints nationwide for the month, reflecting a 3% year-over-year decrease. At California airports, screenings declined 4% to 7.5 million travelers. Southern California airports as well as San Francisco Bay-Oakland saw the most significant passenger declines in February.
- Nonstop domestic seat capacity to California destinations totaled 8.1 million for the month, flat year over year.

Executive Summary International

Forecast (updated February 2025)

The current international forecast does not account for recent wildfire events in Los Angeles and policy decisions by the Trump administration. The next update will occur in May.

Consumer Sentiment

Consumer sentiment in Visit California's 13 priority markets around international leisure travel remained high and consistent with prior months, with price continuing to be the top barrier. However, looking at perceptions and interest in the U.S. and California specifically, sentiment has grown increasingly negative since January.

- On average, across California's priority markets, 42% of international consumers reported plans for international leisure travel (to any destination) within the next 12 months — consistent with February 2024 and up from 39% in the same month two years ago.
- Travel costs remained the primary barrier, cited by 46% of respondents, up slightly from January 2024. Chinese consumers were more likely to cite travel costs relative to a year ago.
- In the Asia-Pacific, India, and Middle East markets, safety and health concerns remained secondary barriers to travel.
- NEW DATA: Based on YouGov sentiment data, consumers in California's core international markets (Australia, Canada, Mexico, UK) have increasingly indicated negative sentiment (heard negative buzz, have a negative impression) about both the U.S. and California as travel destinations which has caused interest in traveling to these destinations to decline (consideration for travel.) However, consumers in these markets generally have more negative sentiment towards the U.S. as a whole compared to sentiment on California.

Airlift/Arrivals

While there were calendar shifts impacting comparisons this month, international airlift and arrival growth rates were in clear negative territory for the month for the state. Measures were somewhat worse for Southern California airports/ports of entry likely suggesting that both wildfires and political climate were having an impact on international visitation.

- In total, there were 1.3 million nonstop seats to California from Visit California's 13 priority markets for the month, down 4% from February 2024. Among overseas markets, the U.K. and Japan had the highest number of nonstop seats to California. China (+34%) and South Korea (+11%) continued to lead in airlift growth.
- Non-resident arrivals from priority markets through California's ports of entry declined by nearly 9% relative to February 2024. Arrivals from every priority market declined for the month. Canada recorded a 12% decline in air arrivals for the month. Chinese arrivals declined 12%, but the calendar shift of Chinese Lunar New Year from February to January impacted comparable travel from the market. The Los Angeles port saw the largest year-over-year decline in arrivals compared to other California ports.
- Note: February 2024 benchmark was a leap year with 29 days compared to 28 days in 2025.

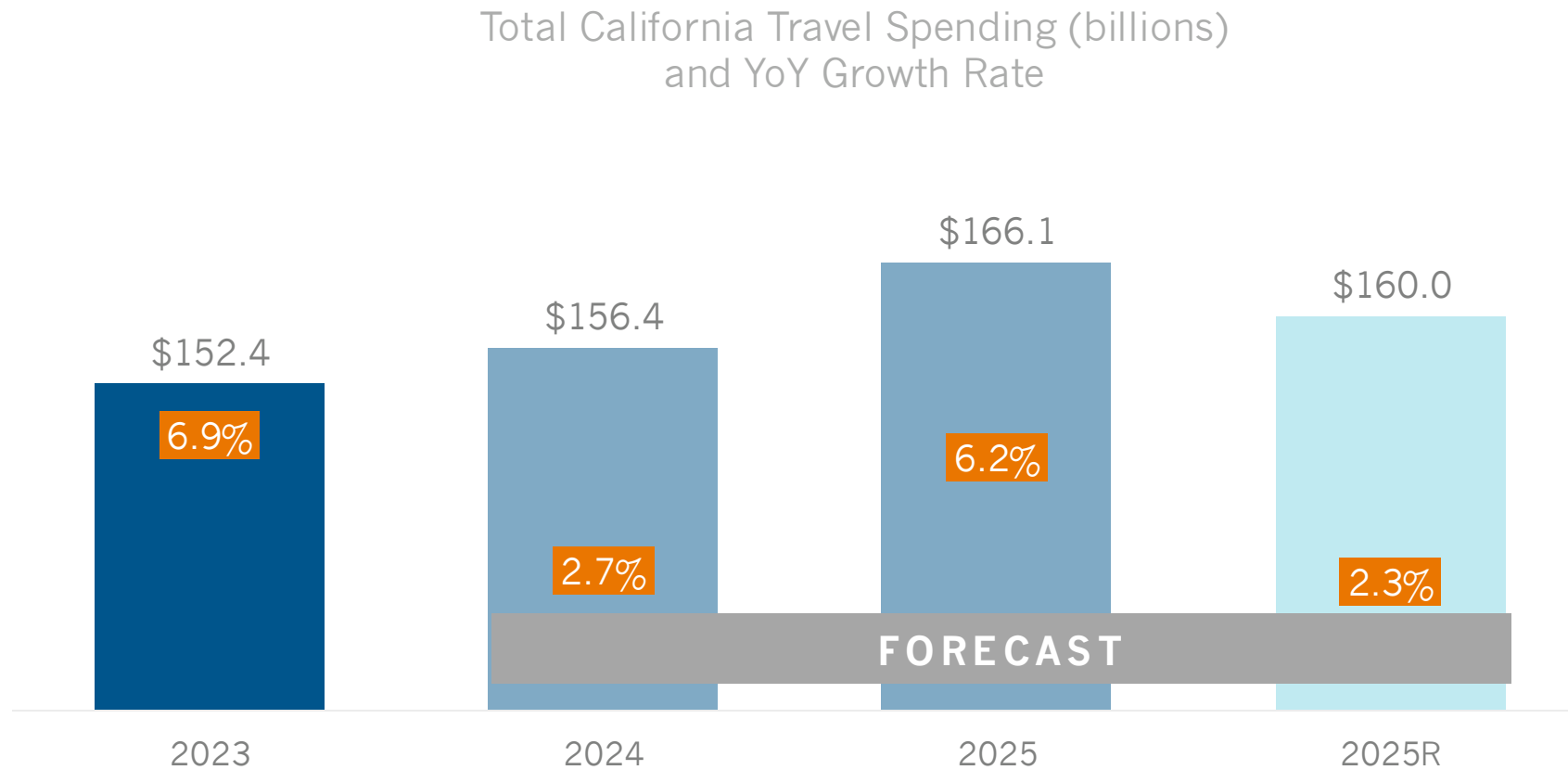


Domestic Indicators: Forecast

- Total Visitation & Spending Forecast
- Domestic Spending Forecast

California Spending Forecast (Revised)

The chart below shows the revised travel spending forecast (domestic and international) and annual growth rate.



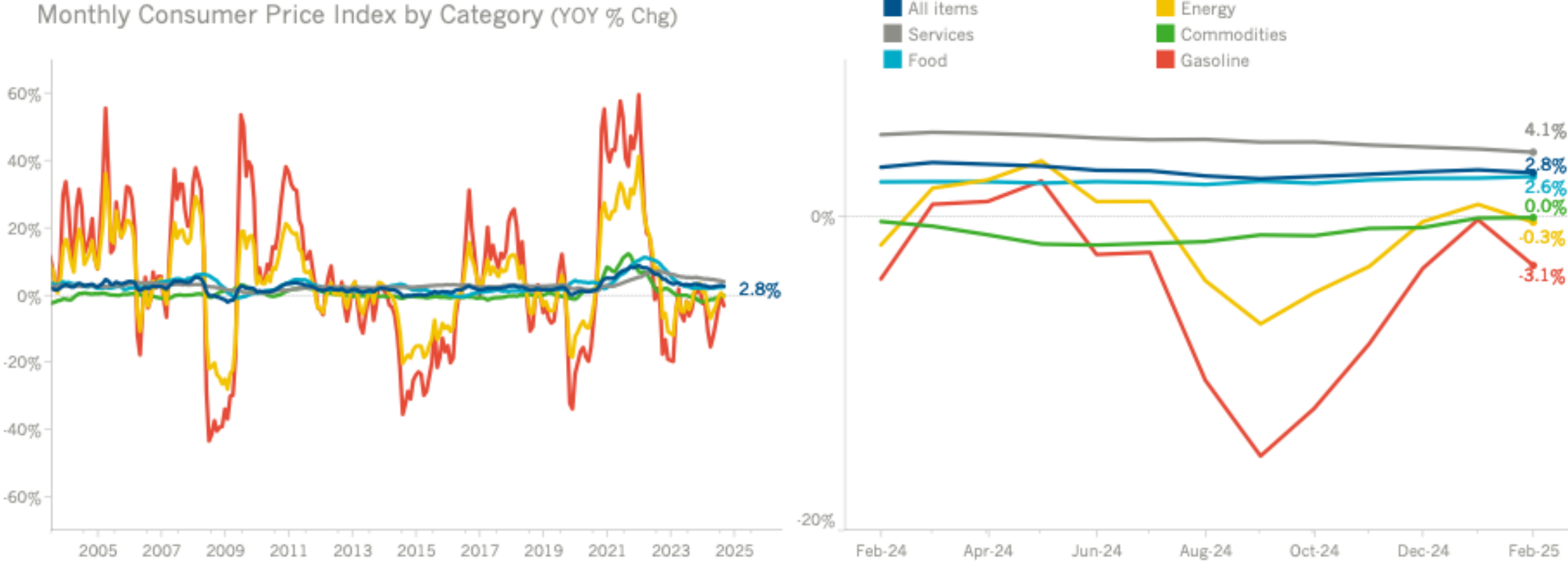


Domestic Indicators: Macroeconomic

- CPI
- Gas Prices
- Jobs/Unemployment Rate
- Consumer Sentiment

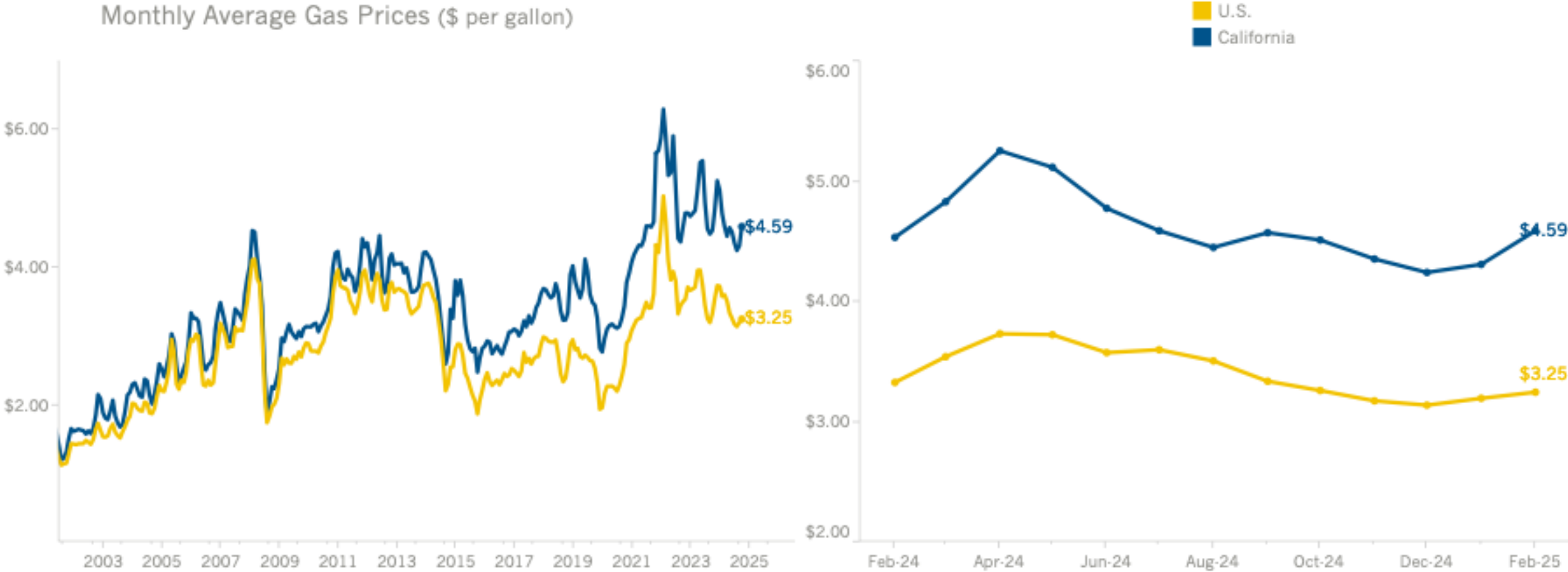
U.S. Inflation Rate

The chart below shows the national Consumer Price Index as a percent change compared to same month in the prior year.



U.S. & California Gas Prices

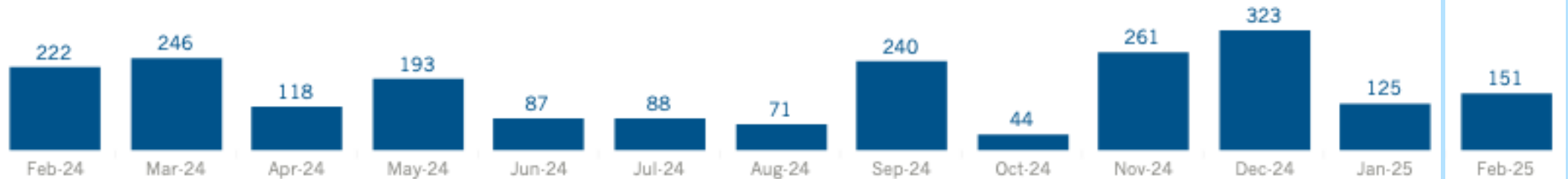
The chart below shows U.S. and California monthly average retail gas price for all grades.



U.S. Jobs Added/Lost & Unemployment Rate

The chart below shows net U.S. non-farm jobs gained or lost for the month and the table shows U.S. unemployment rate.

U.S. Net Jobs Added/Lost from Prior Month ('000)



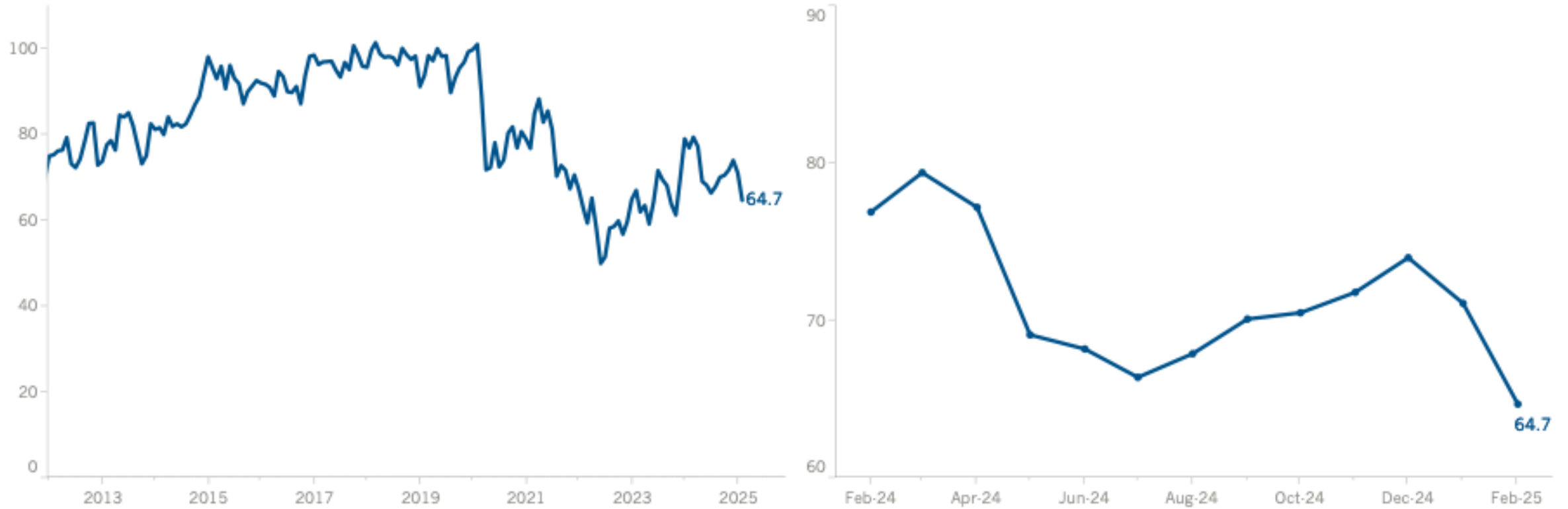
U.S. Unemployment Rate (%)

3.9%	3.8%	3.9%	4.0%	4.1%	4.3%	4.2%	4.1%	4.1%	4.2%	4.1%	4.0%	4.1%
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U.S. Economic Consumer Sentiment

The chart below shows U.S. monthly consumer sentiment about the economy as an index.

U.S. Index of Consumer Sentiment





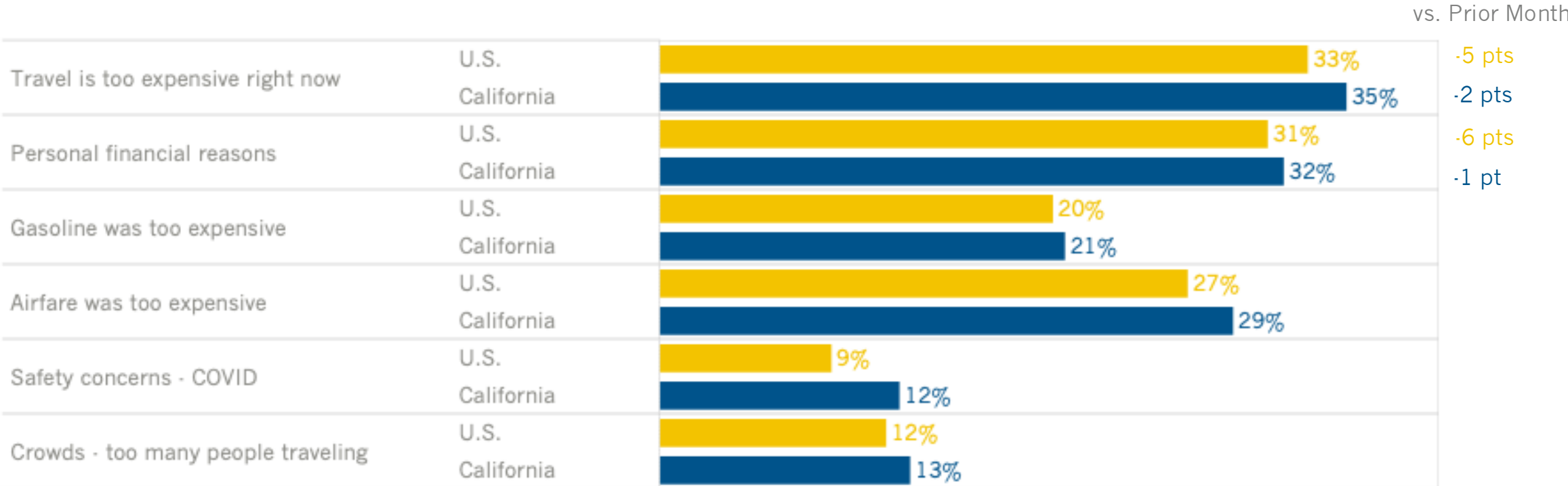
Domestic Indicators: Consumer Sentiment

- Travel Deterrents
- Perceptions of Financial Situation
- Travel as a Budget Priority
- Excitement for Travel
- International Travel Intent

U.S. & California Travel Deterrents

The chart below shows travel deterrents among U.S. and California traveling consumers in the past 6 months.

Travel Deterrents (% past 6 months)



Q: In the past 6 months, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?

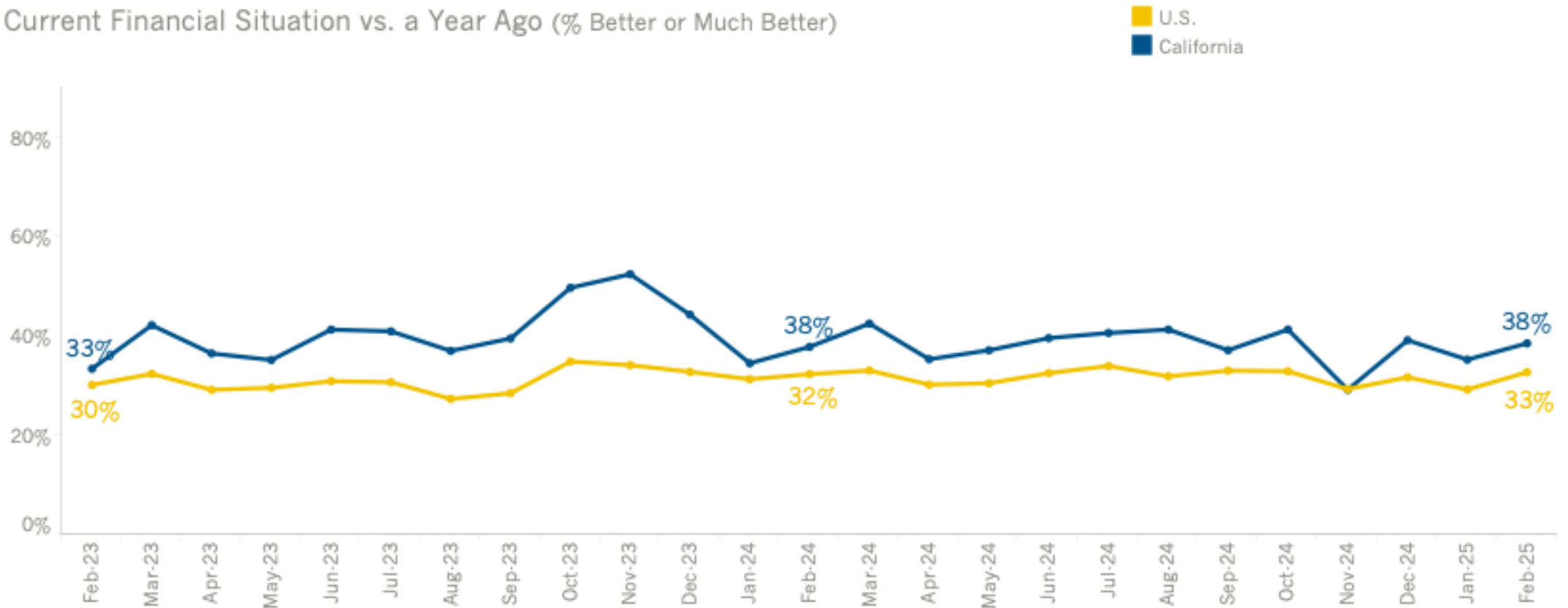
Data reported for: February 2025

Source: Future Partners, *The State of the American Traveler*

U.S. & California Current Financial Situation

The chart below shows perception of current financial situation (vs. a year ago) among U.S. and California traveling consumers.

Current Financial Situation vs. a Year Ago (% Better or Much Better)



Q: Would you say that you (and your household) are better off or worse off financially than you were a year ago?

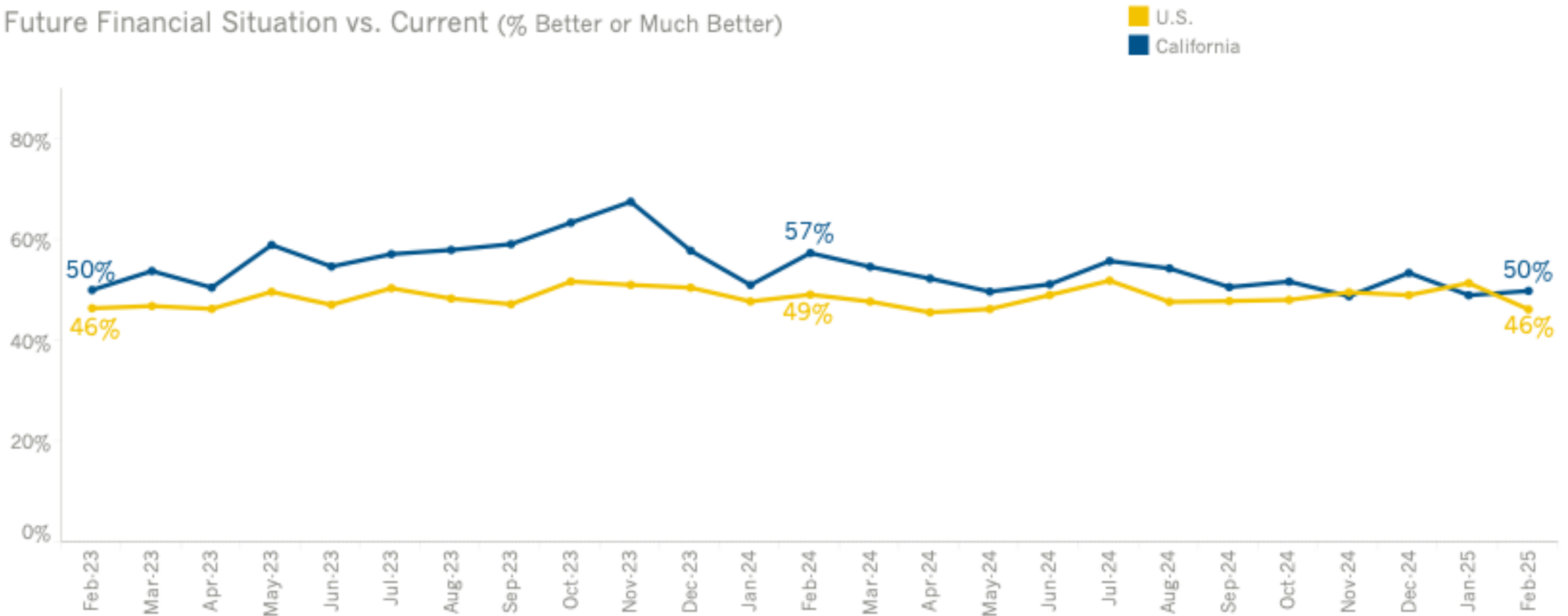
Data reported for: February 2025

Source: Future Partners, *The State of the American Traveler*

U.S. & California Future Financial Situation

The chart below shows perception of future financial situation among U.S. and California traveling consumers.

Future Financial Situation vs. Current (% Better or Much Better)



Q: Looking forward—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

Data reported for: February 2025

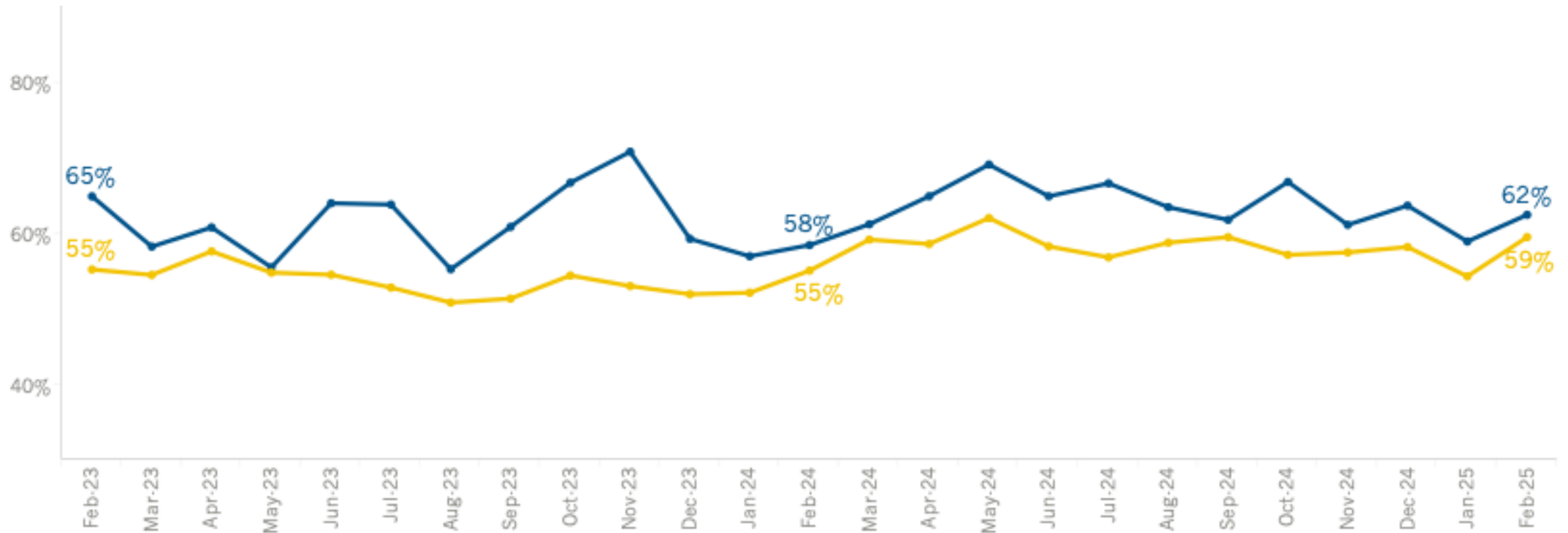
Source: Future Partners, *The State of the American Traveler*

U.S. & California Budget Priorities (Leisure)

The chart below shows perception of leisure travel as a budget priority among U.S. and California traveling consumers.

Leisure Travel as a Budget Priority (% Somewhat High, High, or Extremely High Priority)

■ U.S.
■ California



Q: Thinking carefully about how you expect to spend your income in the next three months, please use the scale below to describe your spending priorities. Leisure travel will be a(n)...

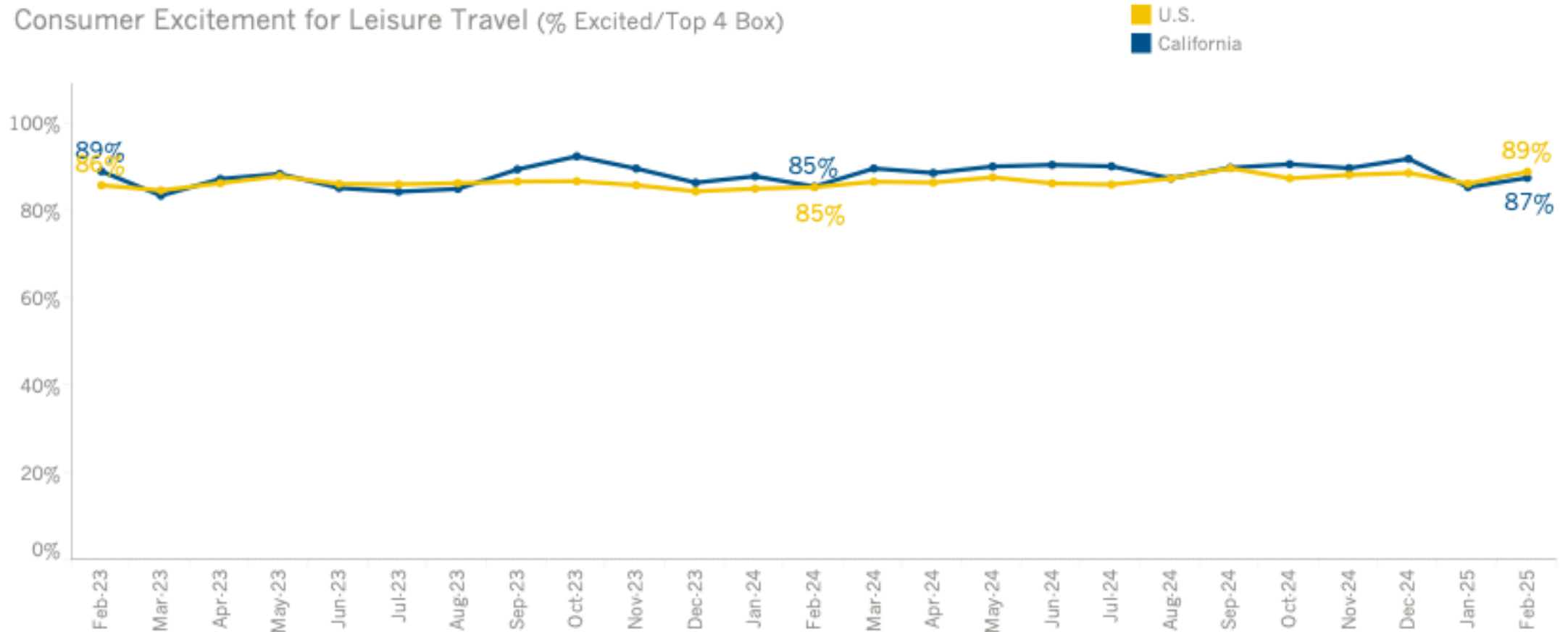
Data reported for: February 2025

Source: Future Partners, *The State of the American Traveler*

U.S. & California Excitement for Travel

The chart below shows consumer excitement to travel in the next 12 months among U.S. and California traveling consumers.

Consumer Excitement for Leisure Travel (% Excited/Top 4 Box)



Q: Which best describes how excited you are about leisure travel in the next 12 months? (11-point scale)

Data reported for: February 2025

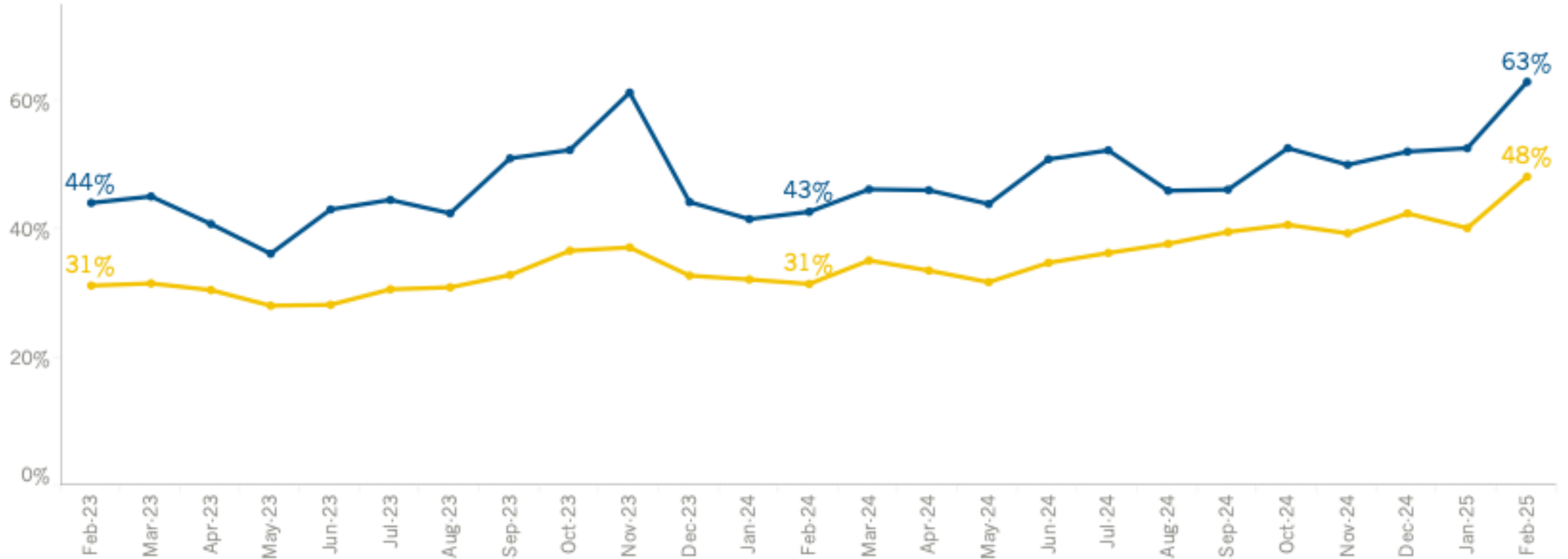
Source: Future Partners, *The State of the American Traveler*

U.S. & California Int'l Leisure Travel Plans

The chart below shows consumer intent to travel outside the U.S. in the next 12 months among U.S. and California traveling consumers.

Likelihood to Travel Outside of the U.S. in the Next 12 Months (% Likely or Very Likely)

■ U.S.
■ California



Q: How likely are you to travel outside of the U.S. for leisure in the next 12 months?

Data reported for: February 2025

Source: Future Partners, *The State of the American Traveler*

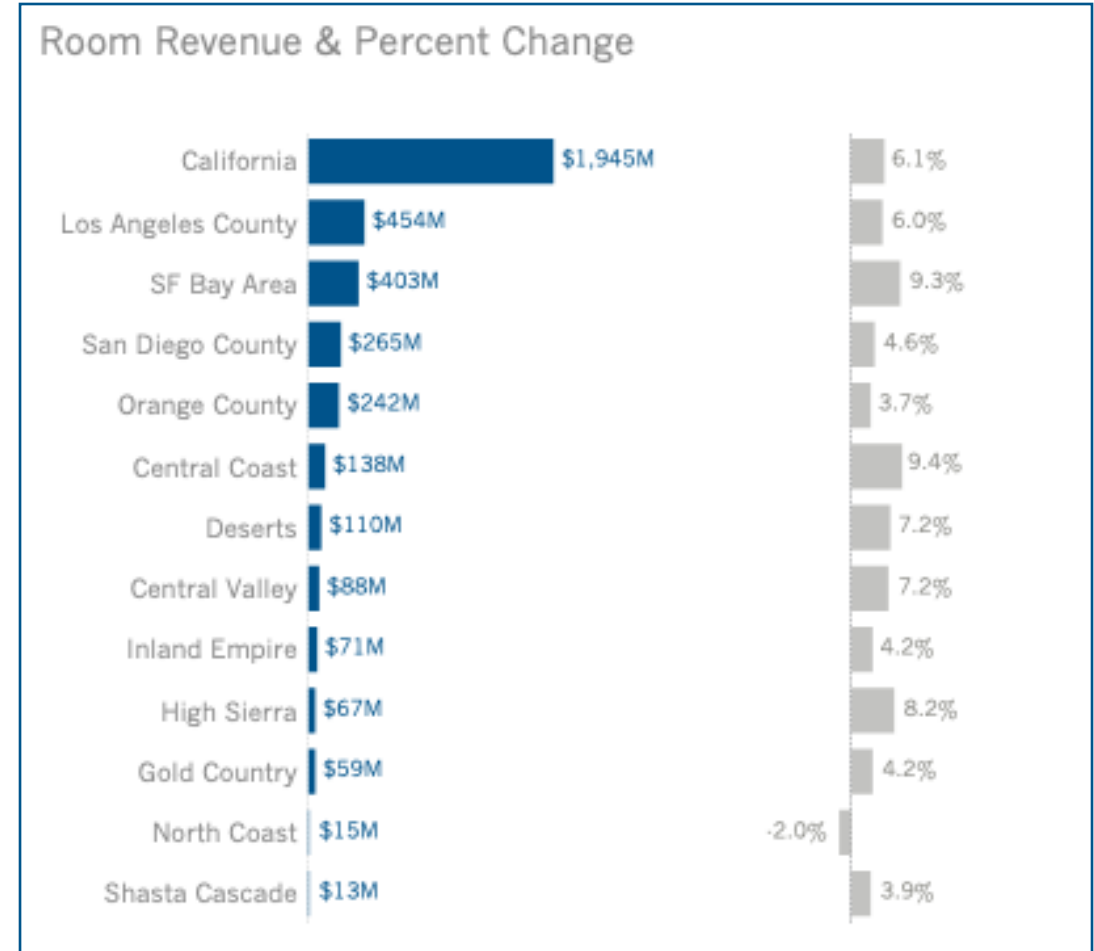
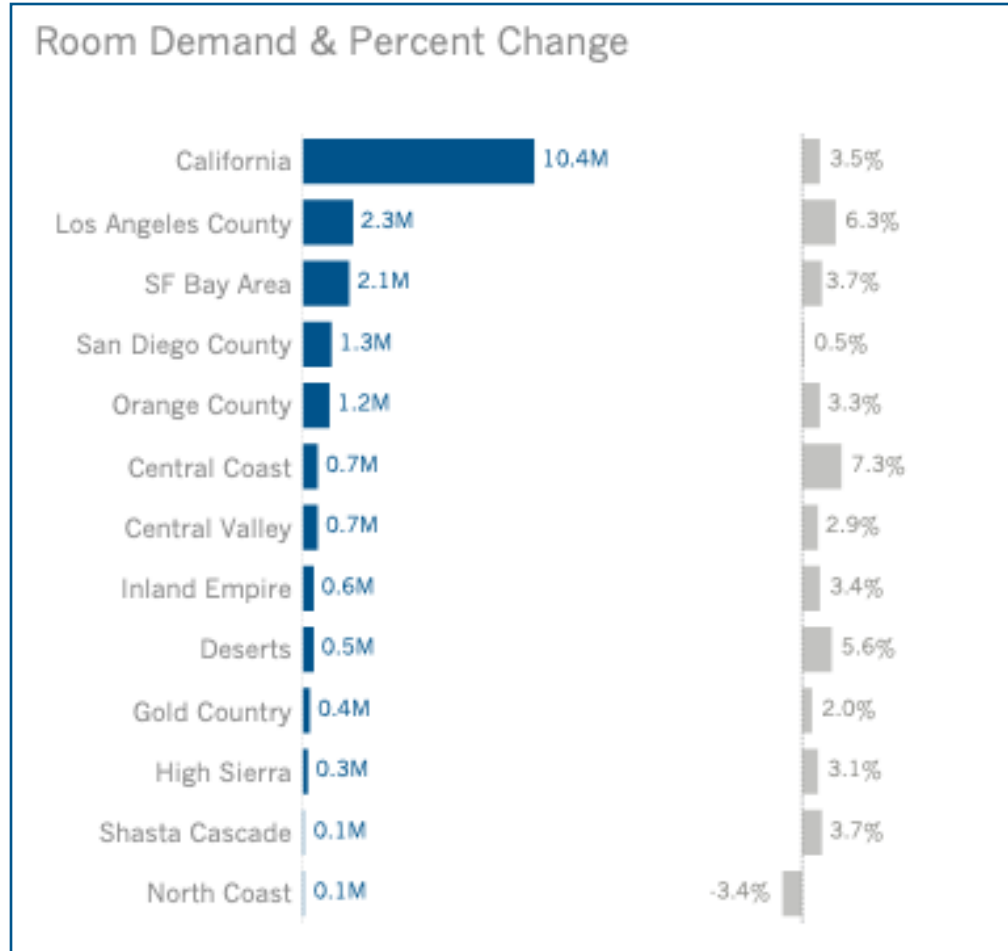


Domestic Indicators: **Lodging**

- Room Demand & Revenue
- Monthly Hotel Performance Metrics
- Weekly Hotel Performance Metrics
- Group Room Demand & Revenue
- Short Term Rental Performance Metrics

California Room Demand & Revenue

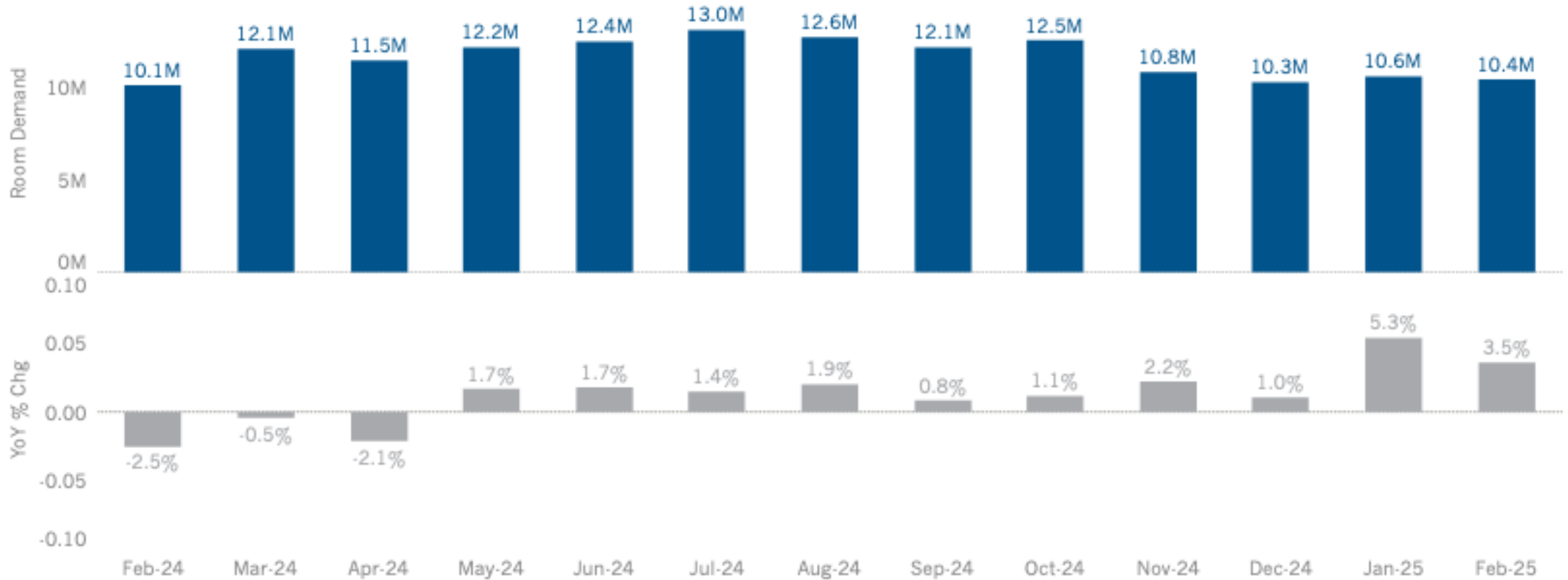
The charts below show California and regions hotel room demand and revenue benchmarked to prior year.



California Hotel Room Demand

The chart below shows monthly California hotel room demand and percent change.

California Hotel Room Demand



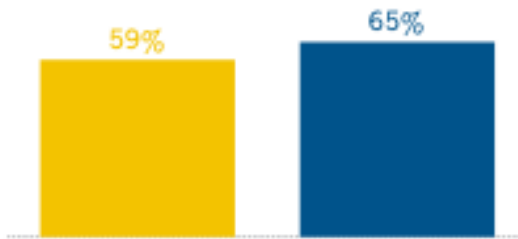
U.S. & California Hotel Metrics

The charts below show key hotel metrics and percent change for the U.S. and California for the reporting month.

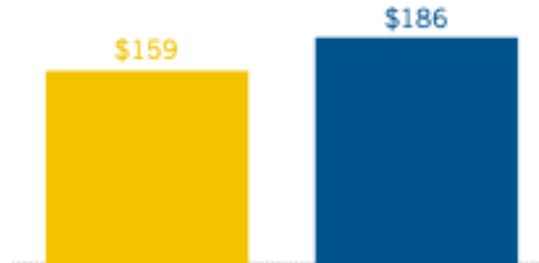
U.S. & California Hotel Performance Metrics (February 2025)

■ U.S. ■ California

Occupancy



ADR



RevPAR



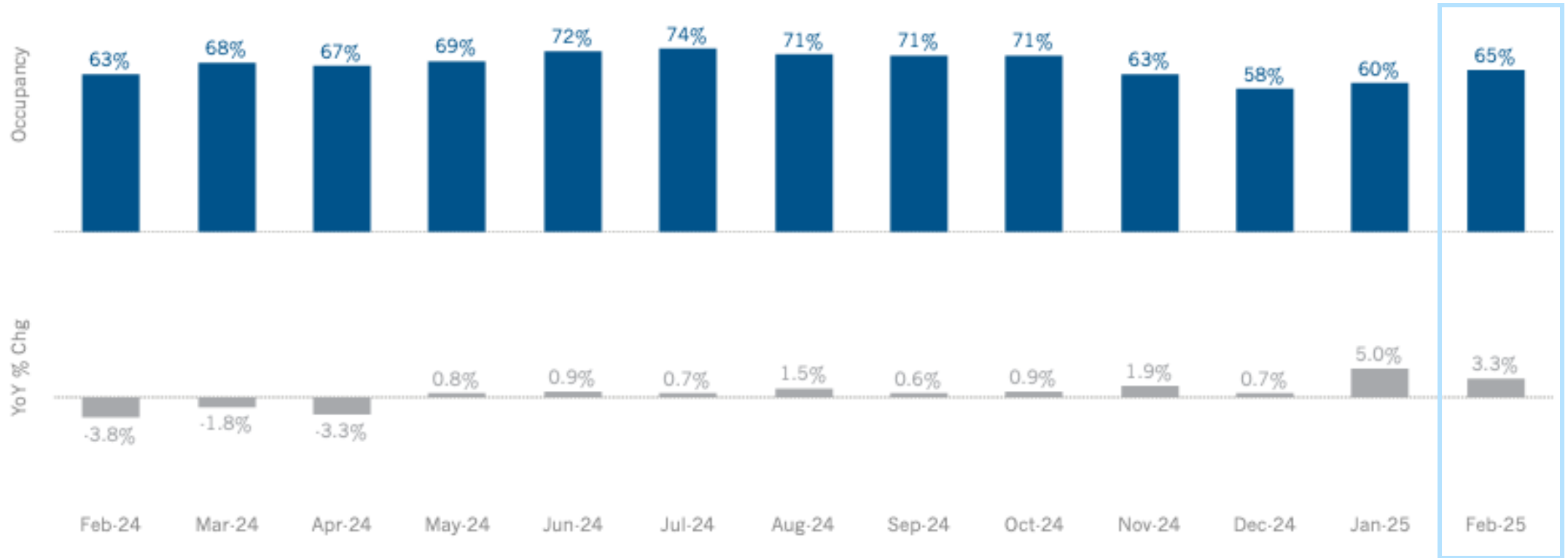
YoY % Chg



California Hotel Occupancy

The chart below shows monthly California hotel occupancy rates and percent change.

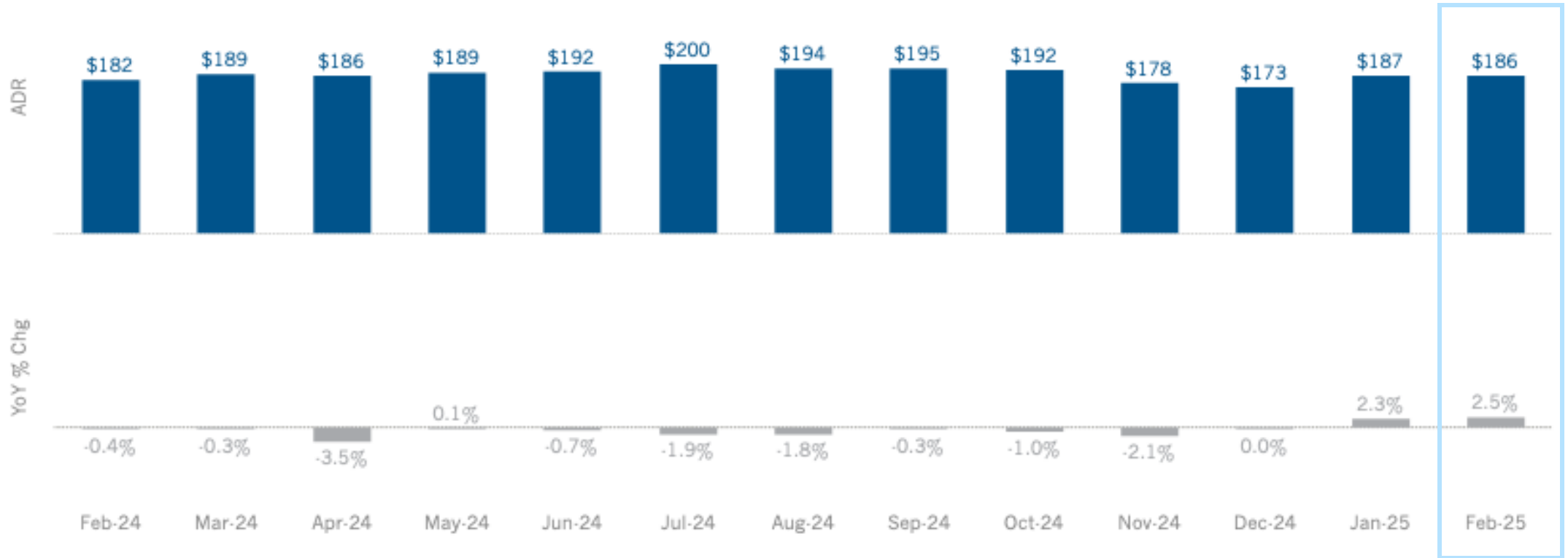
California Hotel Occupancy



California Hotel ADR

The chart below shows monthly California hotel average daily rates (ADR) and percent change.

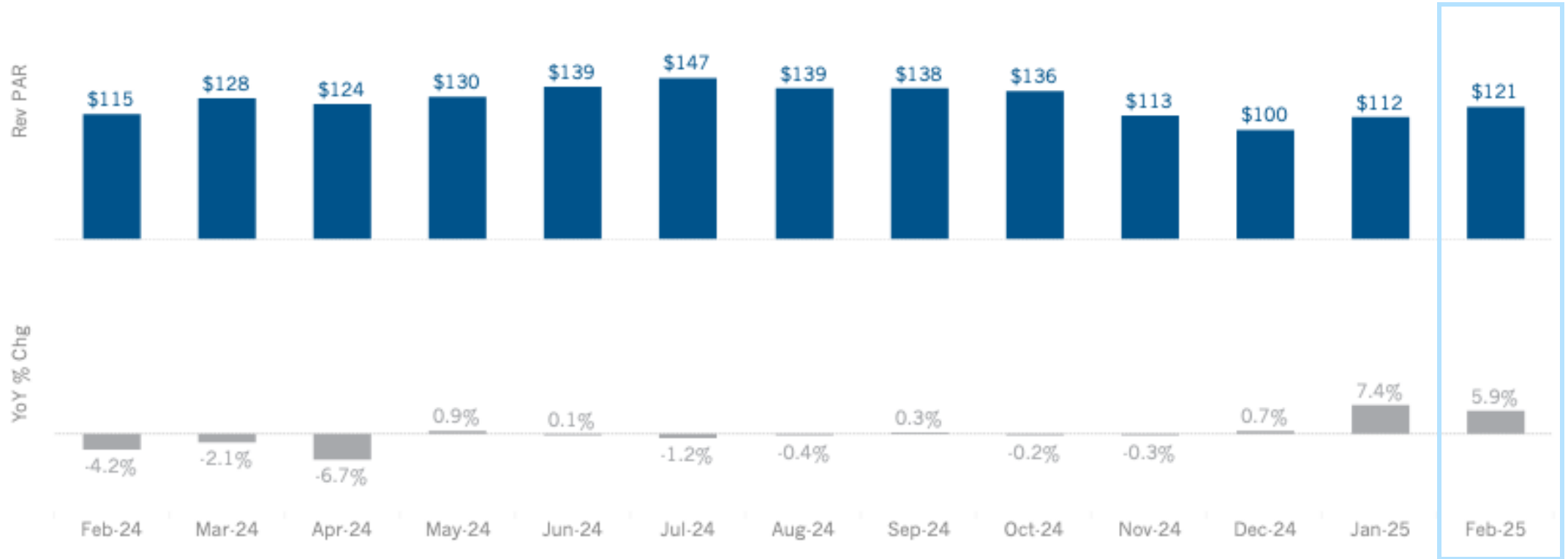
California Hotel ADR



California Hotel RevPAR

The chart below shows monthly California hotel revenue per available room (RevPAR) and percent change.

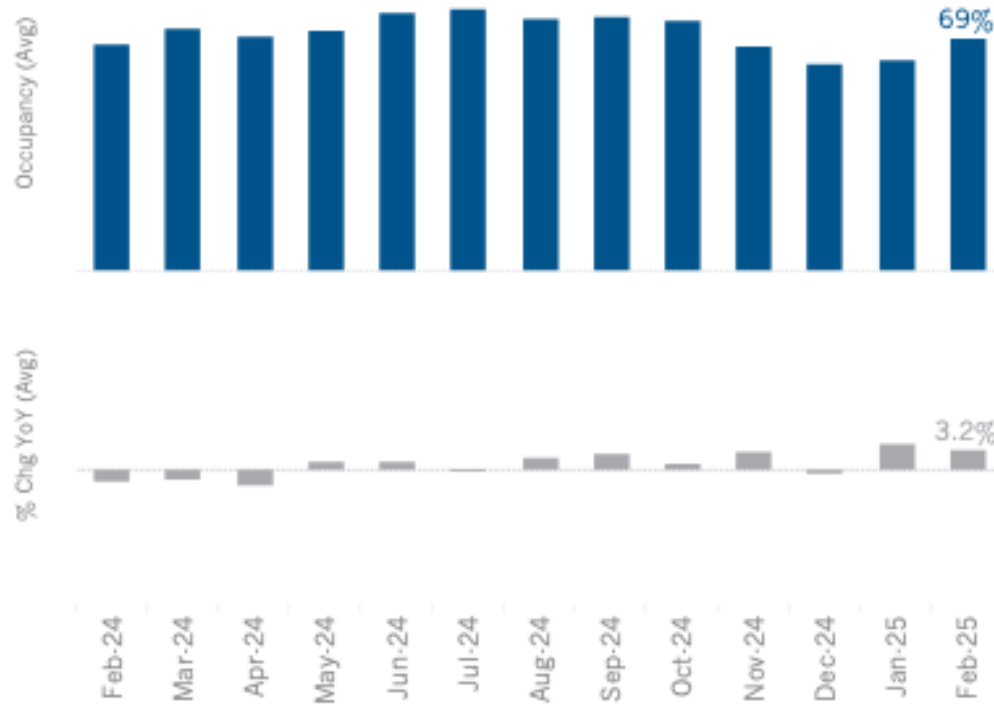
California Hotel RevPAR



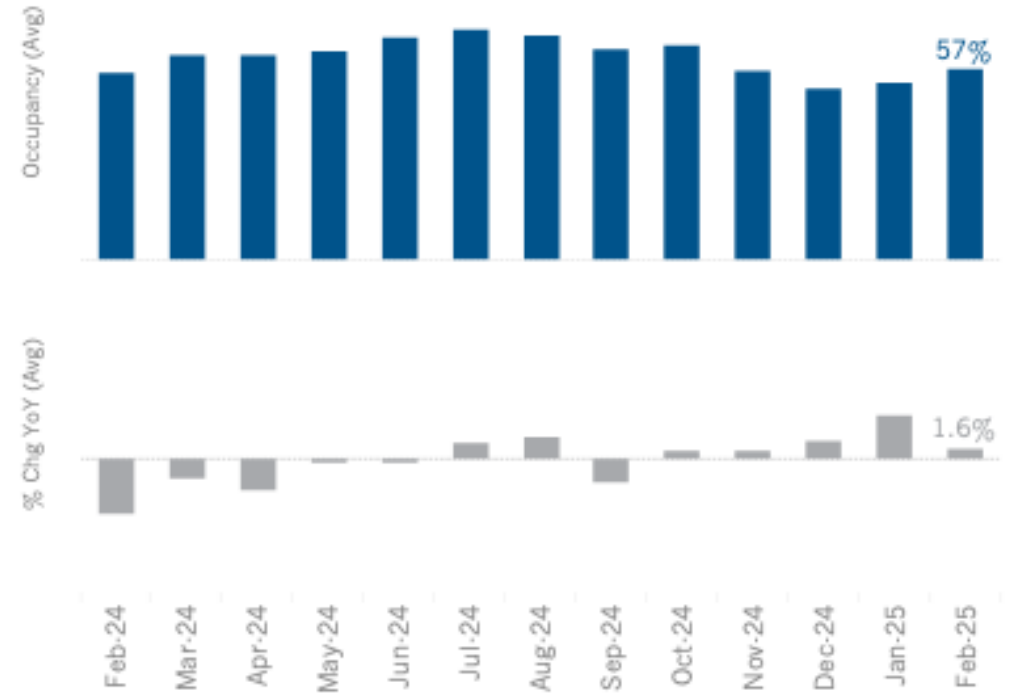
Gateway & Other Regions Hotel Occupancy

The charts below show average monthly occupancy rates and percent changes for the Gateway and Other/Rural tourism regions.

Gateway Region Occupancy



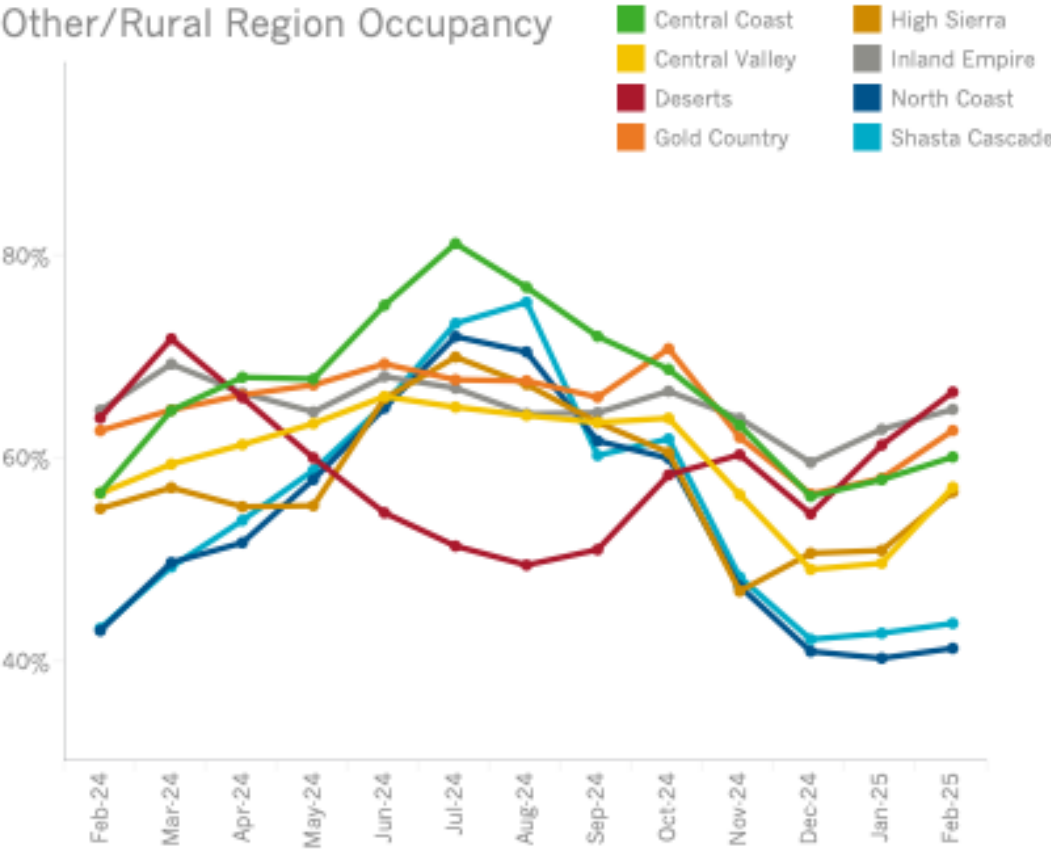
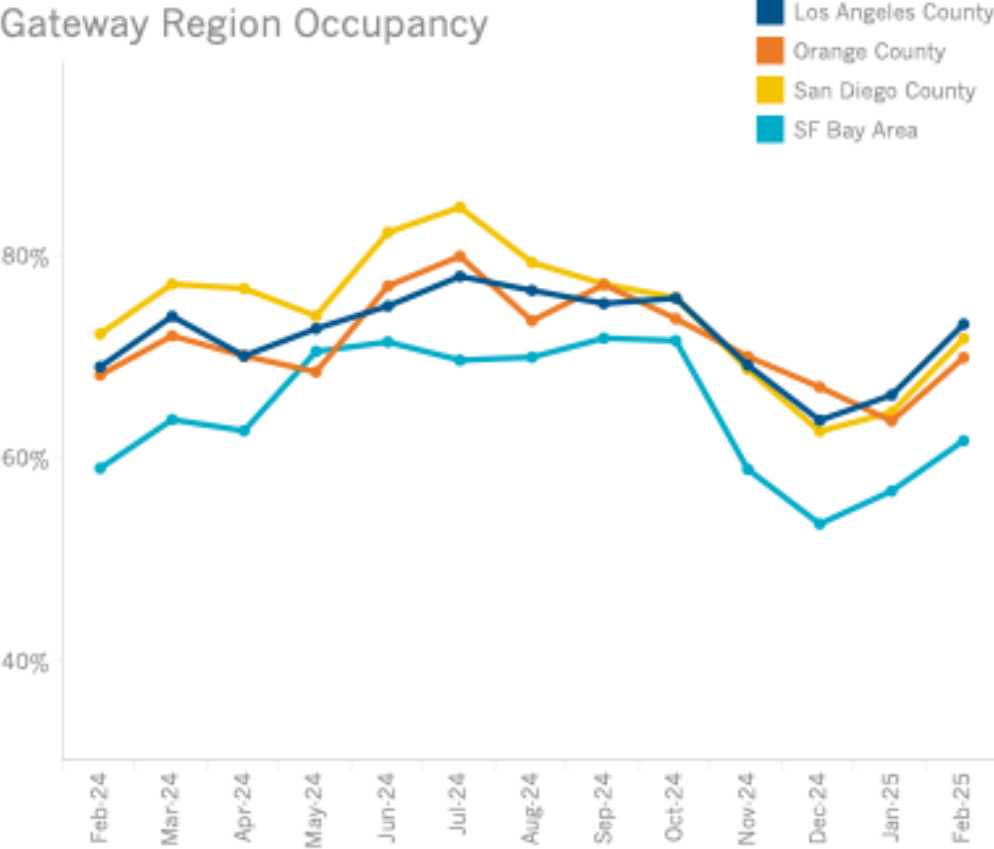
Other/Rural Region Occupancy



Gateway Regions include: Los Angeles County, Orange County, San Diego County, & San Francisco Bay Area
 Other/Rural Regions include: Central Coast, Central Valley, Deserts, Gold Country, High Sierra, Inland Empire, North Coast, & Shasta Cascade
 Data reported through: February 2025

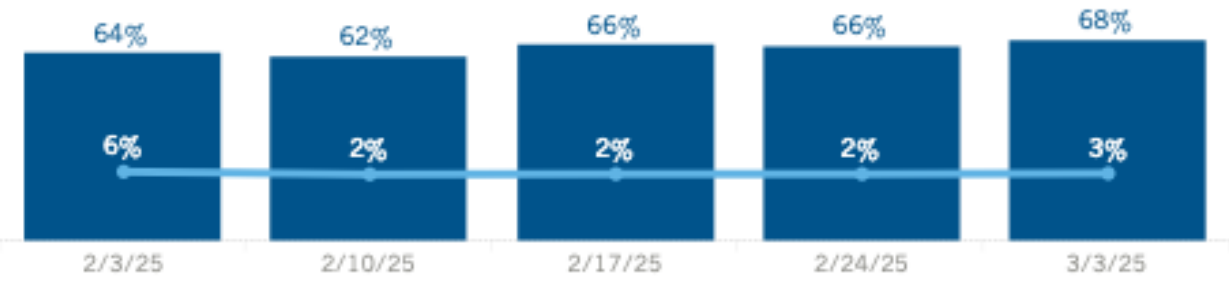
Regions Hotel Occupancy

The charts below show monthly occupancy rates the individual Gateway and Other/Rural tourism regions.

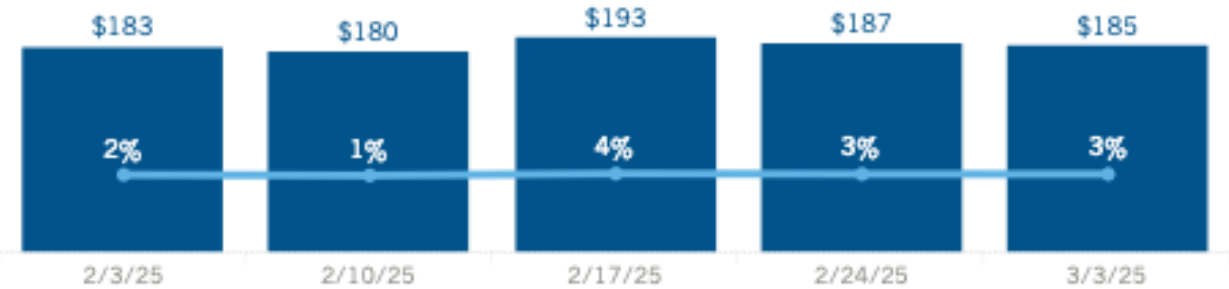


California Hotel Metrics (Weekly)

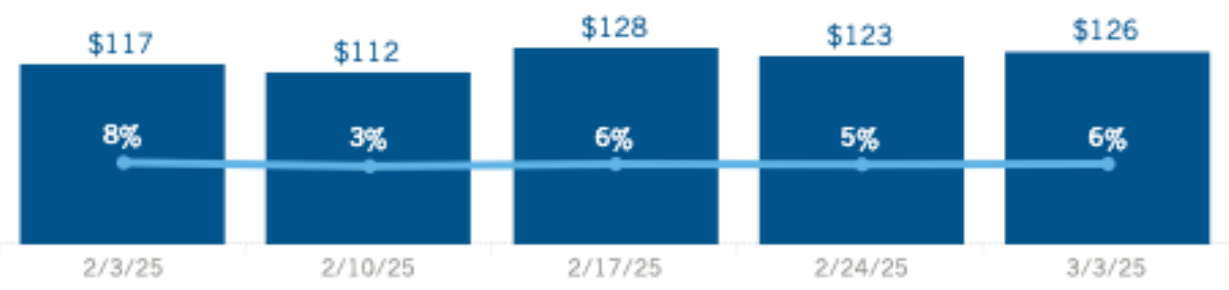
Occupancy



ADR



RevPAR



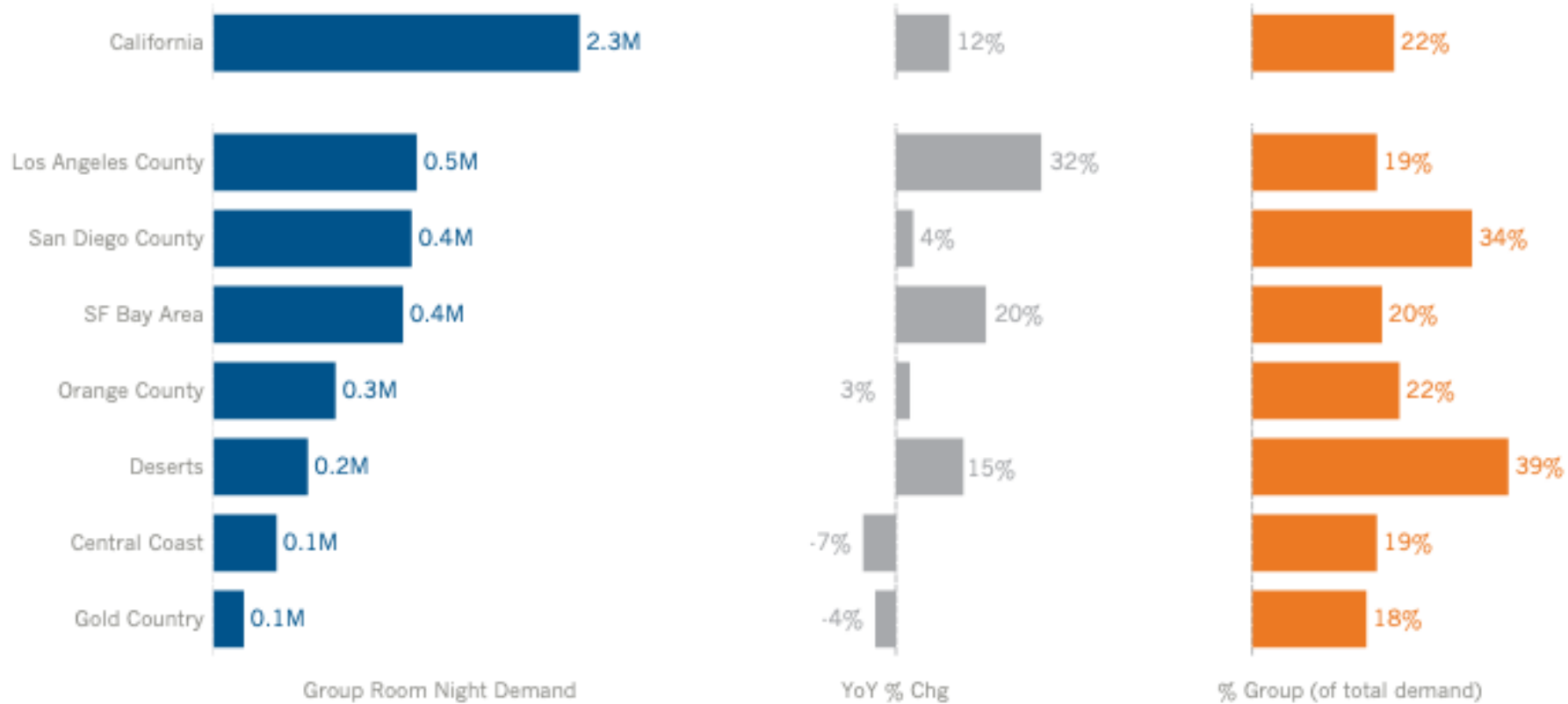
California Hotel Metrics (Weekly)

The charts to the left show key California hotel metrics (dark blue text) and year-over-year percent change (white text) for weeks in the reporting month. Dates shown are week ending dates.

California Hotel Group Demand

The chart below shows group room demand by market for the reporting month, percent change, & percent of total demand.

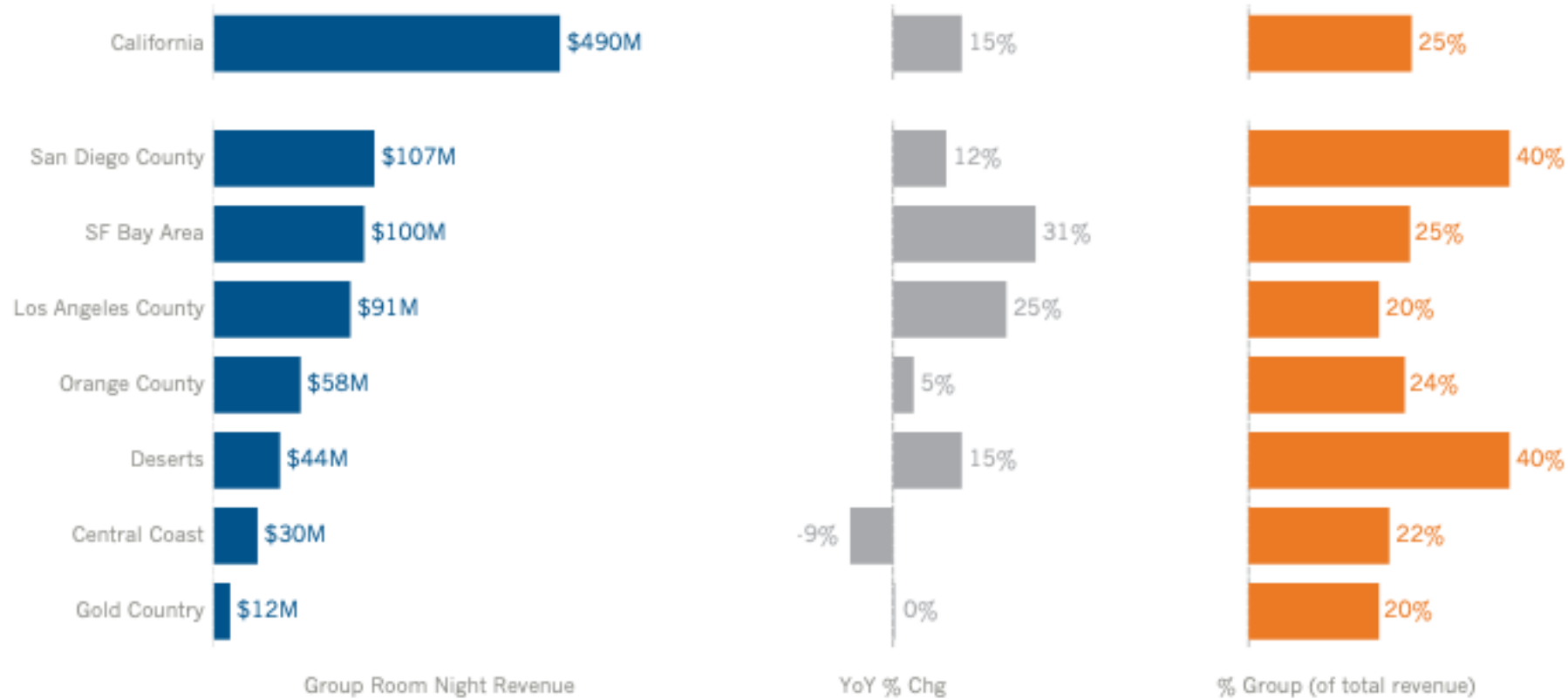
California & Regions Hotel Group Room Night Demand



California Hotel Group Revenue

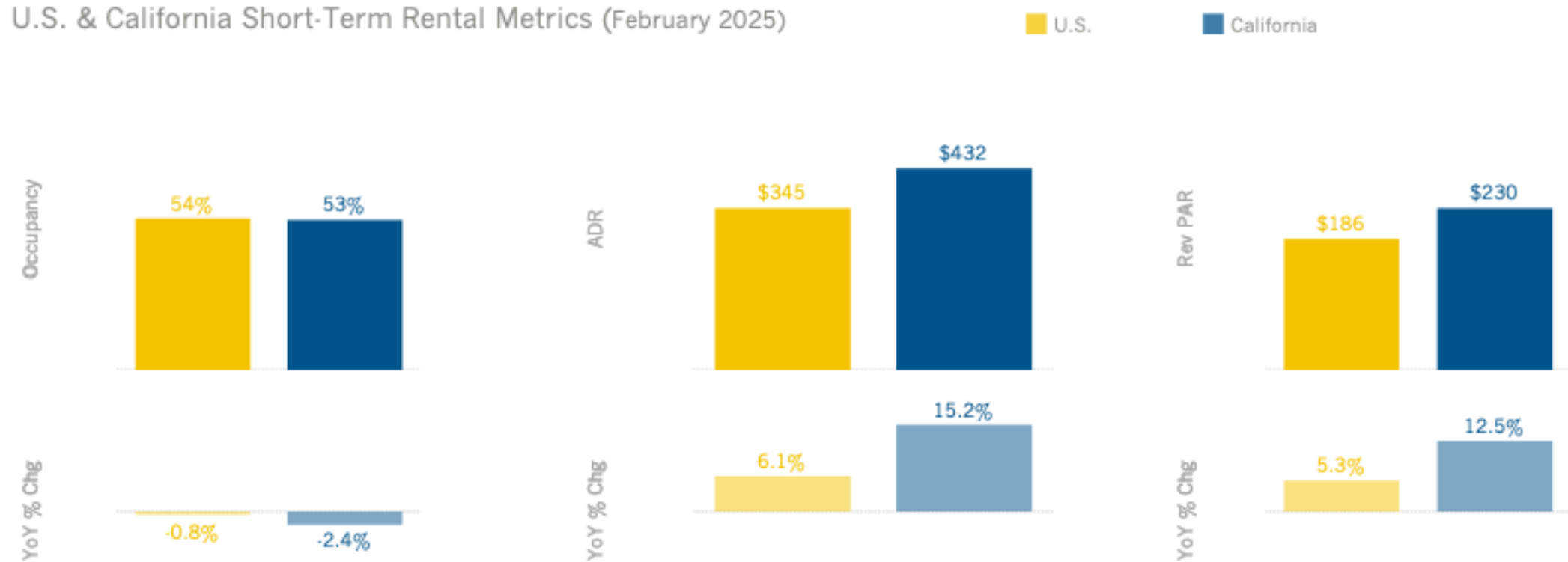
The chart below shows group room revenue by market for the reporting month, percent change, & percent of total demand.

California & Regions Hotel Group Room Night Revenue



California Short-Term Rental Metrics

The charts below show key short-term rental metrics and percent change for the U.S. and California for the reporting month.





Domestic Indicators:

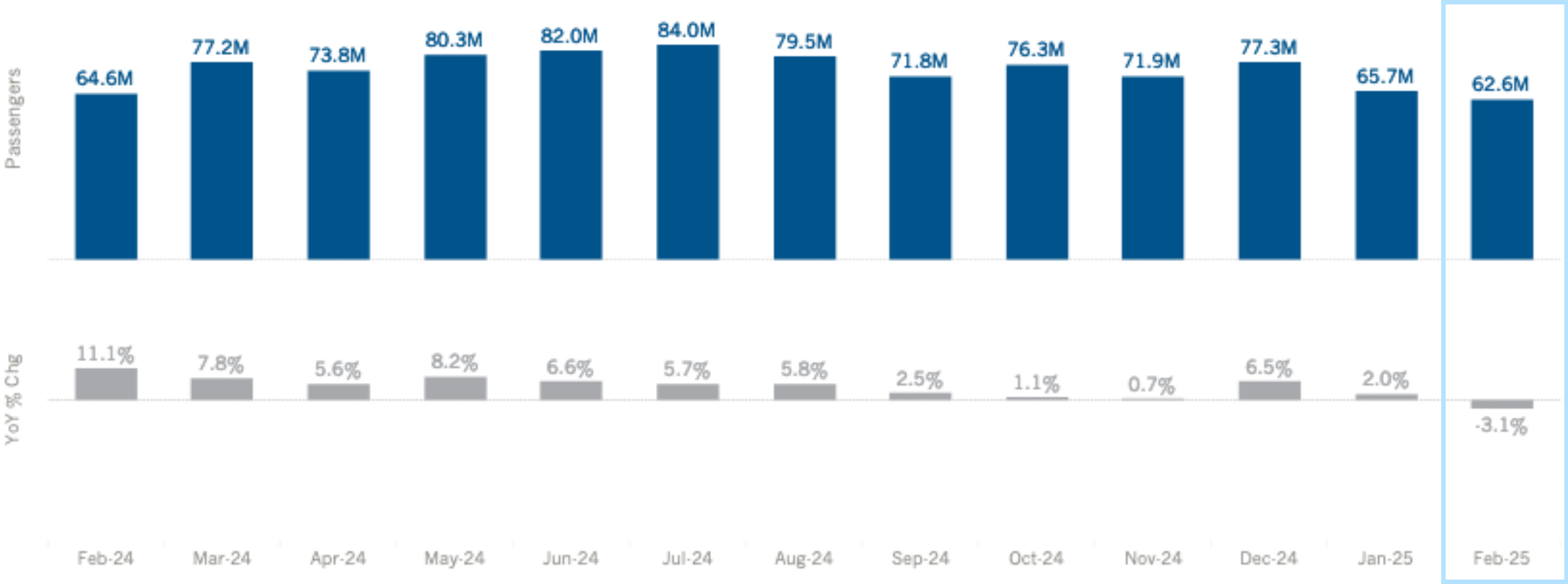
Airlift

- Air Passenger Throughput
- Domestic Non-Stop Seats

US Air Passenger Throughput

The chart below shows the monthly total number of passengers screened at TSA checkpoints in U.S. airports and percent change.

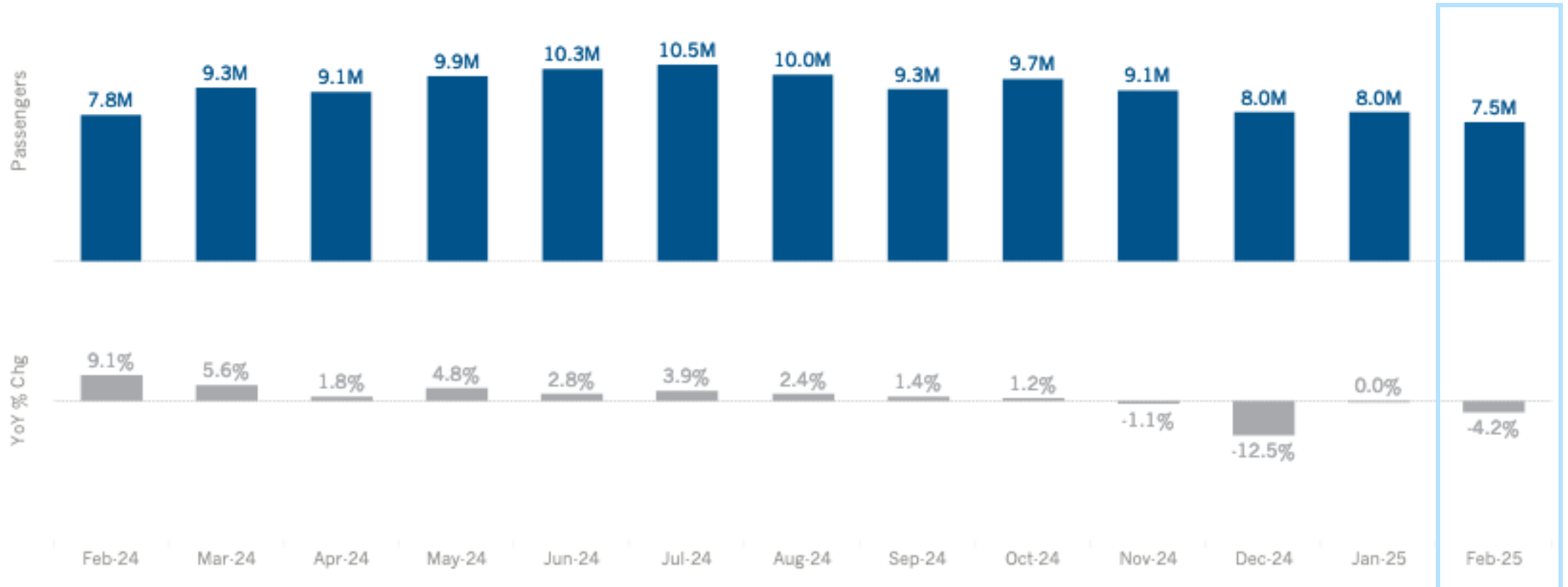
U.S. Air Passenger Throughput



CA Air Passenger Throughput

The chart below shows the monthly total number of passengers screened at TSA checkpoints in CA airports and percent change.

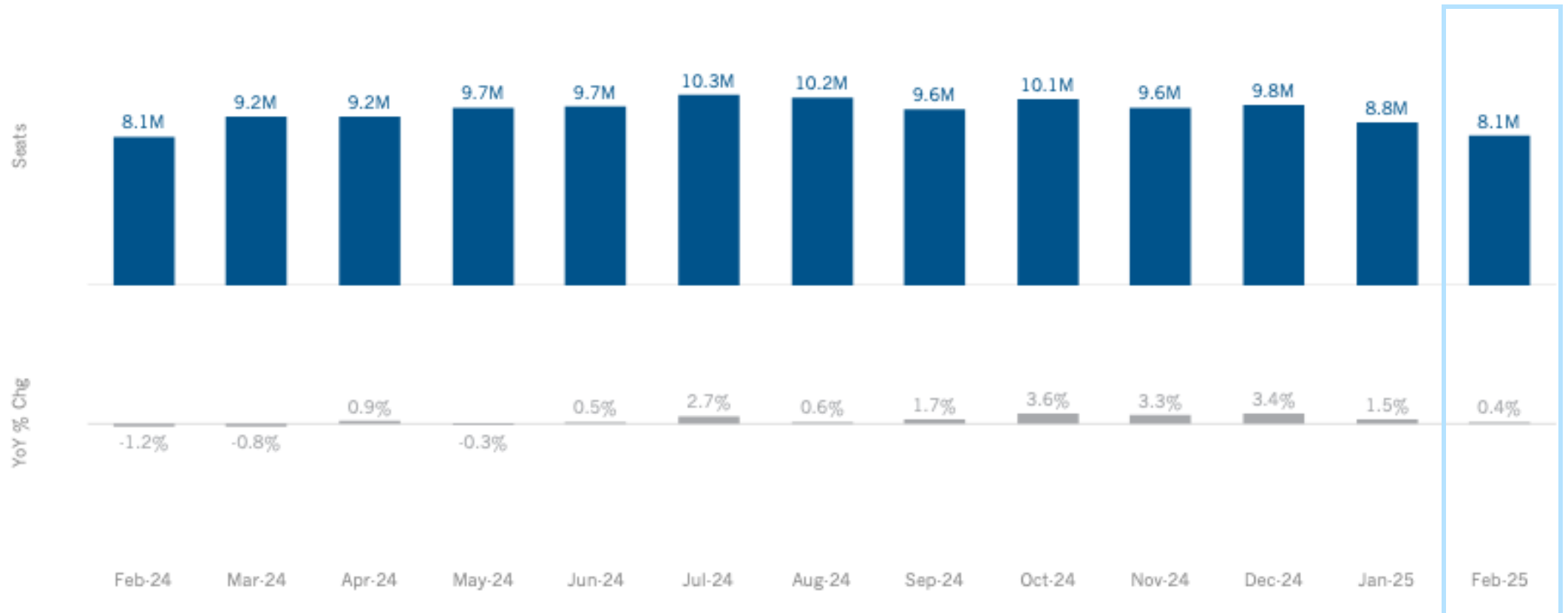
CA Air Passenger Throughput



California Domestic Non-Stop Seats

The chart below shows monthly domestic non-stop seats to California and percent change.

California Domestic Non-Stop Seats (February 2025)



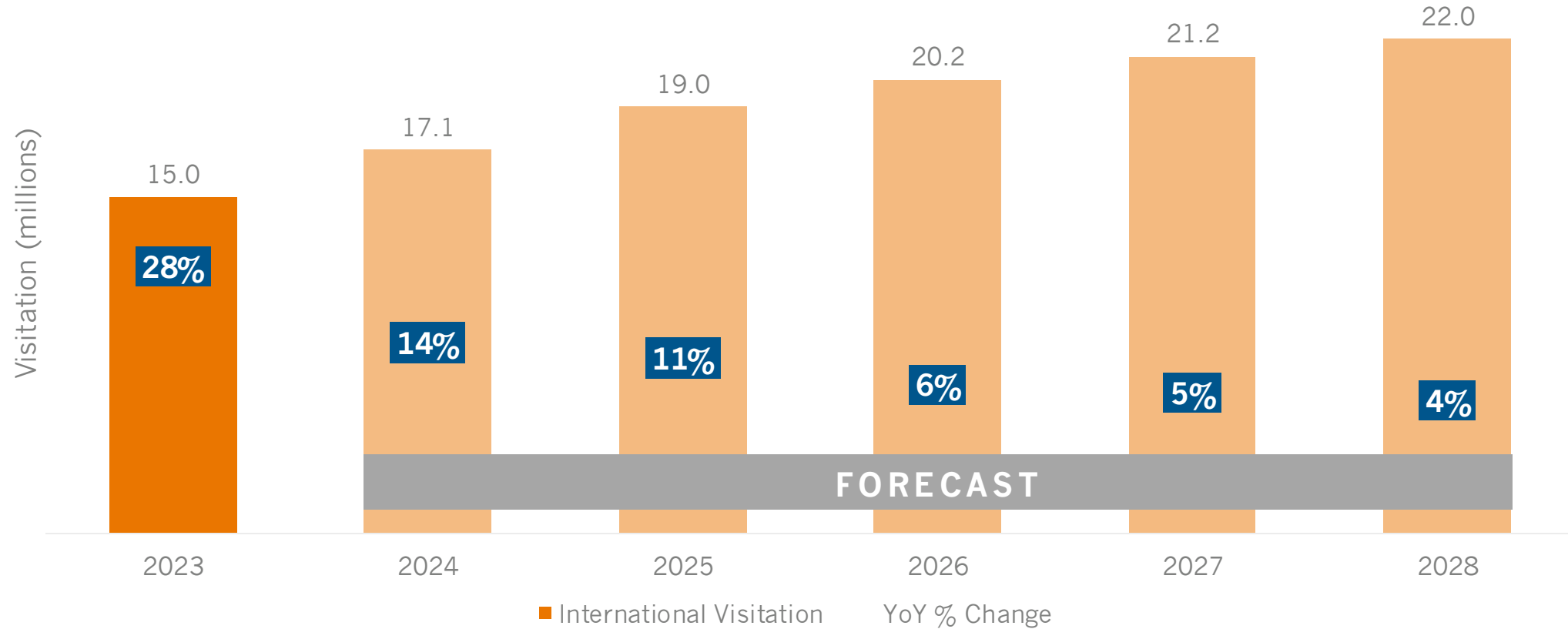


International Indicators: Forecast

- International Market Forecast

California Int'l Visitation Forecast

The chart below shows the current international visitation forecast and annual growth rate.

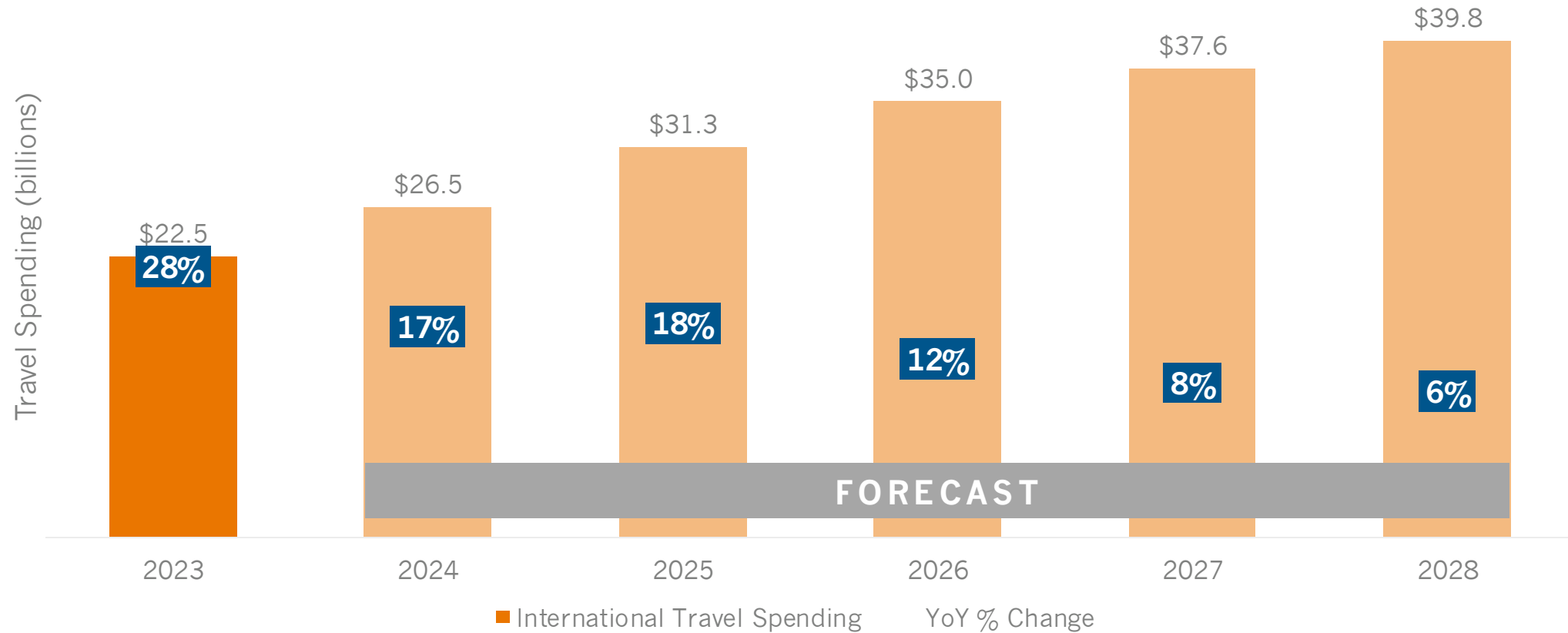


Note: International forecasts for California have not been revised. Next forecast update is May.

Source: Tourism Economics (February 2025)

California Int'l Spending Forecast

The chart below shows the current travel international spending forecast and annual growth rate.



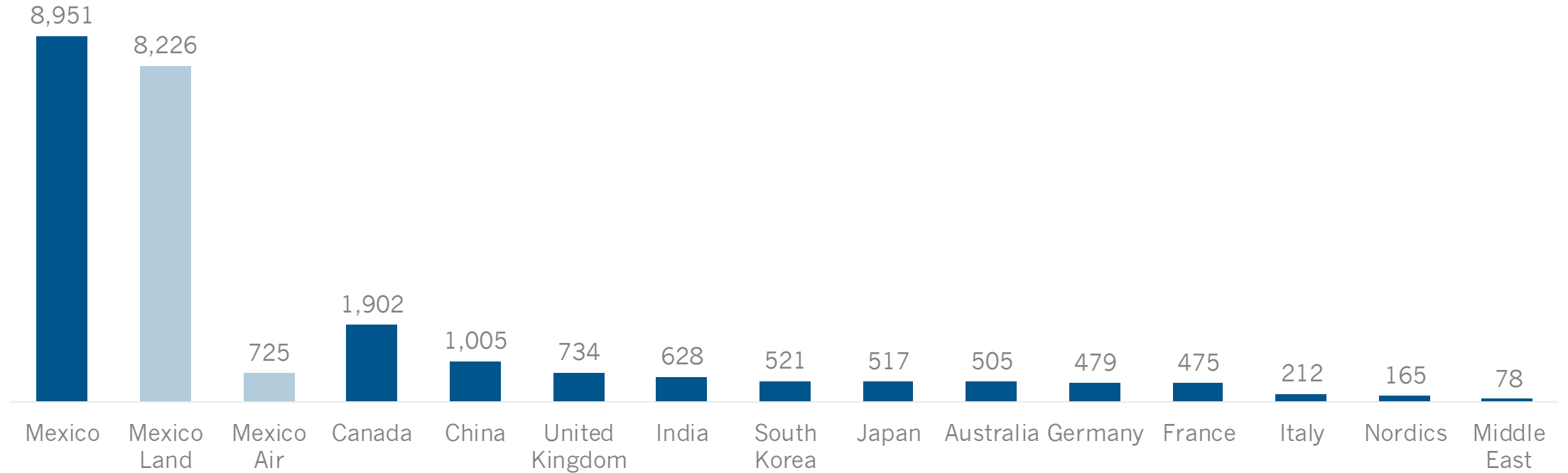
Note: International forecasts for California have not been revised. Next forecast update is May.

Source: Tourism Economics (February 2025)

California Int'l Market Visitation Forecast

The table below shows the international visitation forecast for California broken out by international market.

2025 Visitation Forecast (Millions), Growth Rate, & Recovery Index



YoY % Chg:	9%	9%	9%	7%	34%	13%	8%	13%	28%	13%	8%	11%	8%	14%	15%
Recovery Index:	117	115	135	110	97	97	150	107	92	85	107	104	104	68	84

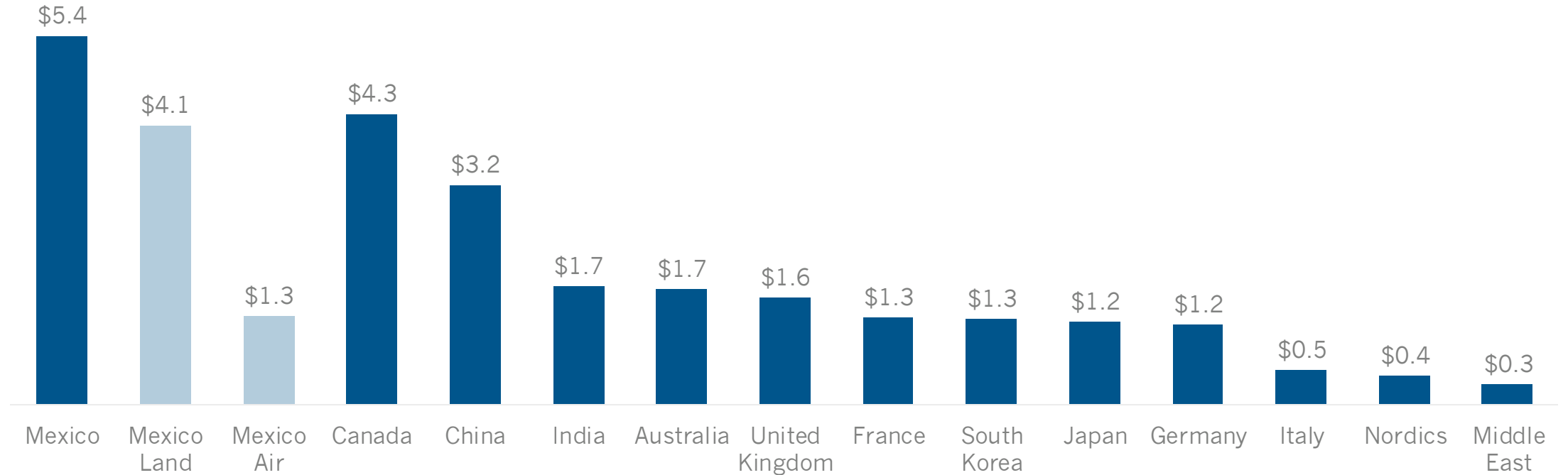
Note: International forecasts for California have not been revised. Next forecast update is May.

Source: Tourism Economics (February 2025)

California Int'l Market Spending Forecast

The table below shows the international visitor spend forecast for California broken out by international market.

2025 Visitor Spend Forecast (Billions), Growth Rate & Recovery Index



YoY % Chg:	11%	11%	11%	15%	42%	16%	18%	18%	16%	17%	31%	12%	11%	19%	20%
Recovery Index:	129	121	164	135	120	132	135	111	112	109	89	121	108	70	109

Note: International forecasts for California have not been revised. Next forecast update is May.

Source: Tourism Economics (February 2025)



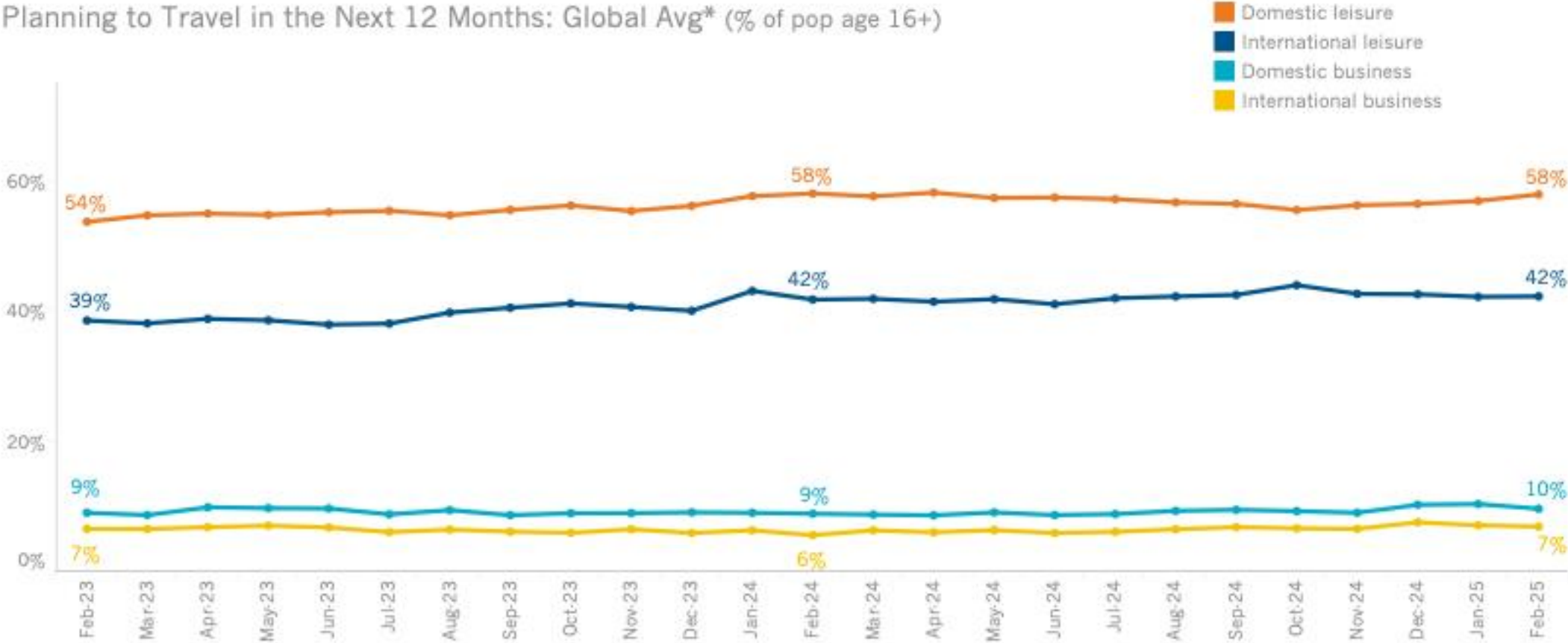
International Indicators: Consumer Sentiment

- Travel Planned
- Barriers to Travel
- Sentiment on U.S. & California

International Markets Travel Planned

The chart below shows types of travel planned in the next 12 months among international market consumers.

Planning to Travel in the Next 12 Months: Global Avg* (% of pop age 16+)



Q: Which, if any, of the following trips are you planning to take in the next 12 months?

*Based on respondents in Australia, Canada, China, Germany, France, India, Italy, Japan, Mexico, Middle East (Saudi Arabia & UAE), Nordics, South Korea & UK

Data reported for: February 2025

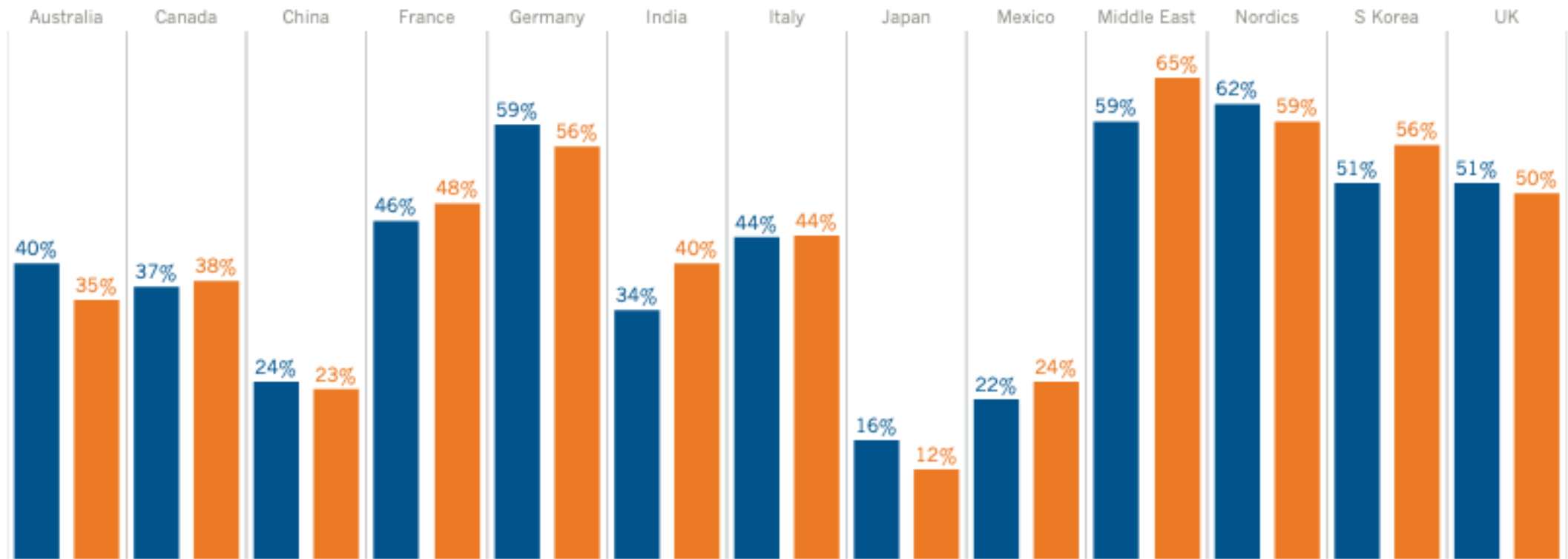
Source: YouGov

Travel Planned (International Leisure)

The chart below shows international leisure travel planned in the next 12 months by market.

Planning to Travel in the Next 12 Months: International Leisure Trip (% of pop age 16+)

■ Feb-24 ■ Feb-25

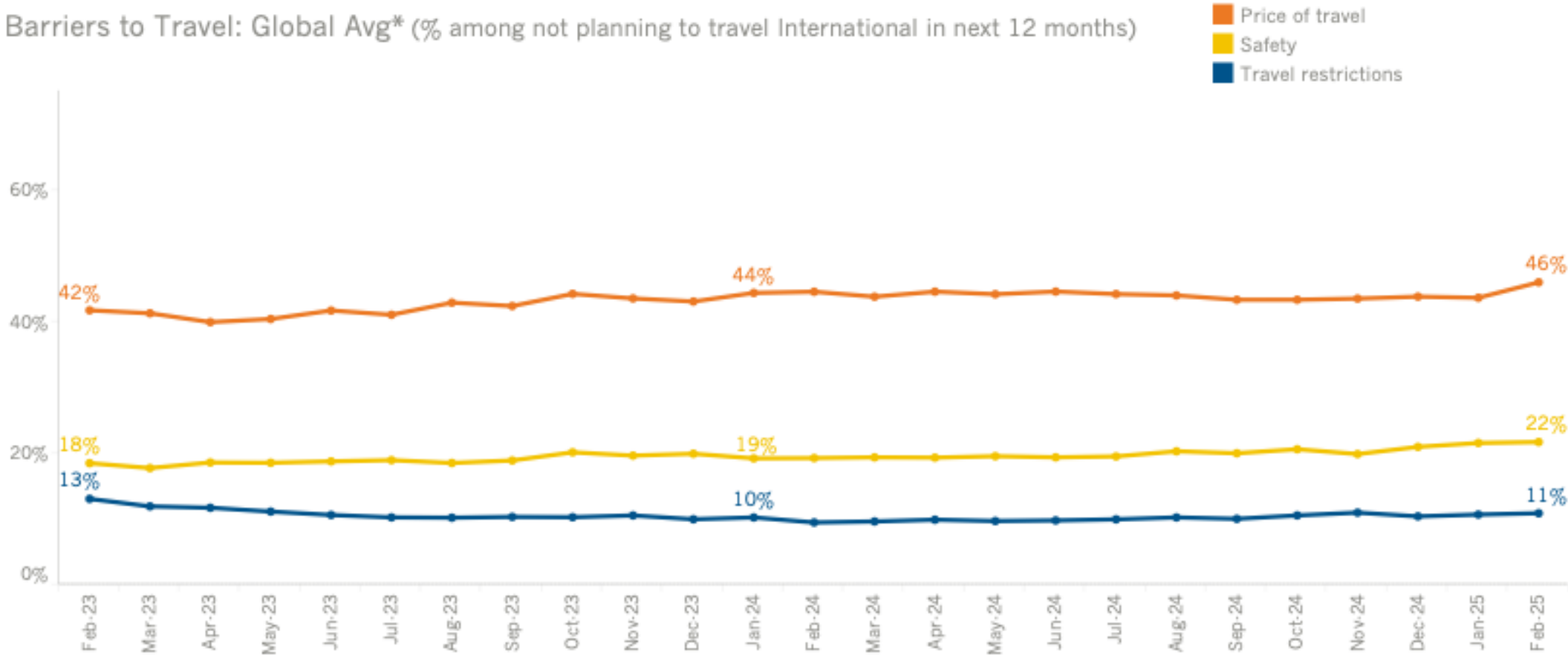


Q: Which, if any, of the following trips are you planning to take in the next 12 months?
Data reported for: February 2025

Source: YouGov

International Markets Barriers to Travel

The chart below shows perceived barriers to travel among international market consumers not currently planning an international trip.



Q: Which, if any, of the below factors are currently preventing you from traveling?

*Based on respondents in Australia, Canada, China, Germany, France, India, Italy, Japan, Mexico, Middle East (Saudi Arabia & UAE), Nordics, South Korea, & UK

Data reported for: February 2025

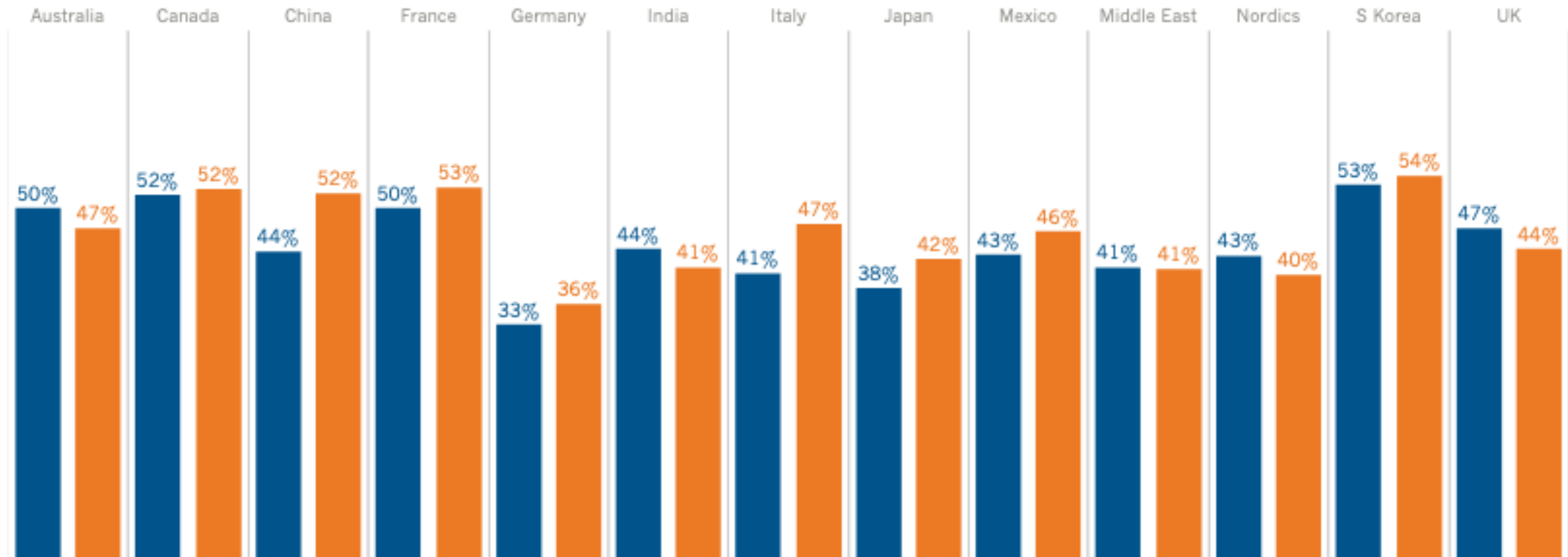
Source: YouGov

Barriers to Travel (Price)

The chart below shows price of travel as a barrier among international consumers not currently planning an international trip.

Barriers to Travel: Price of Travel (% among not planning to travel International in next 12 months)

■ Feb-24 ■ Feb-25



Q: Which, if any, of the below factors are currently preventing you from traveling?

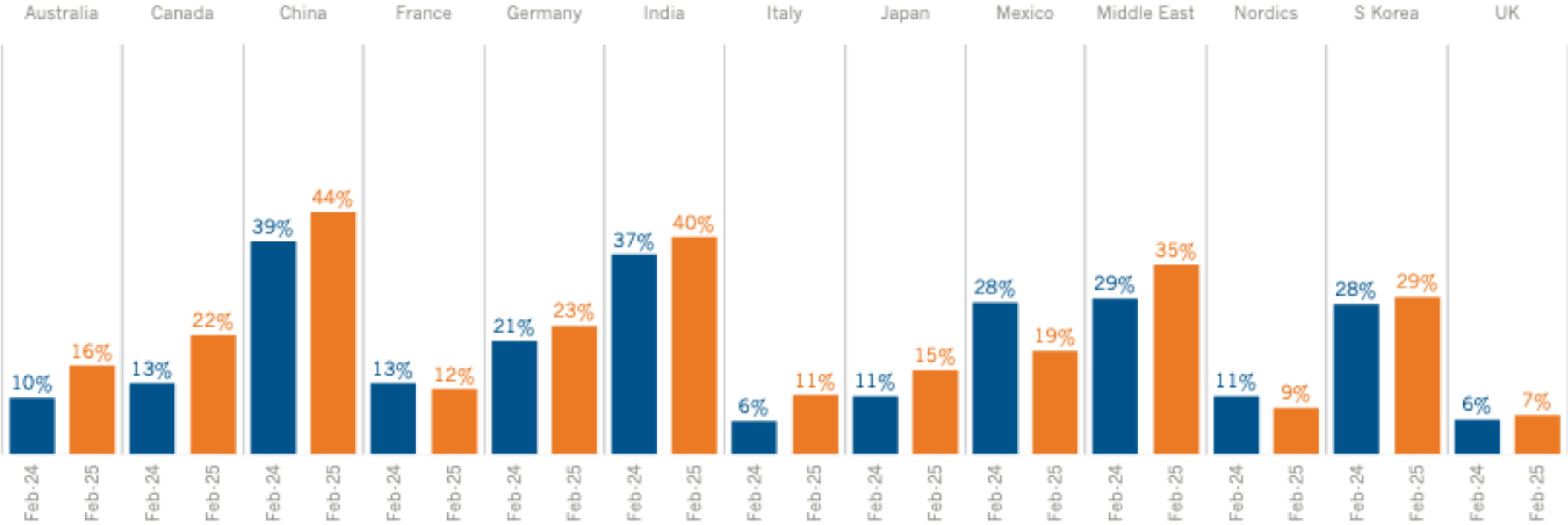
Data reported for: February 2025

Source: YouGov

Barriers to Travel (Safety)

The chart below shows safety as a travel barrier among international consumers not currently planning an international trip.

Barriers to Travel: Safety (% among not planning to travel International in next 12 months)



Q: Which, if any, of the below factors are currently preventing you from traveling?

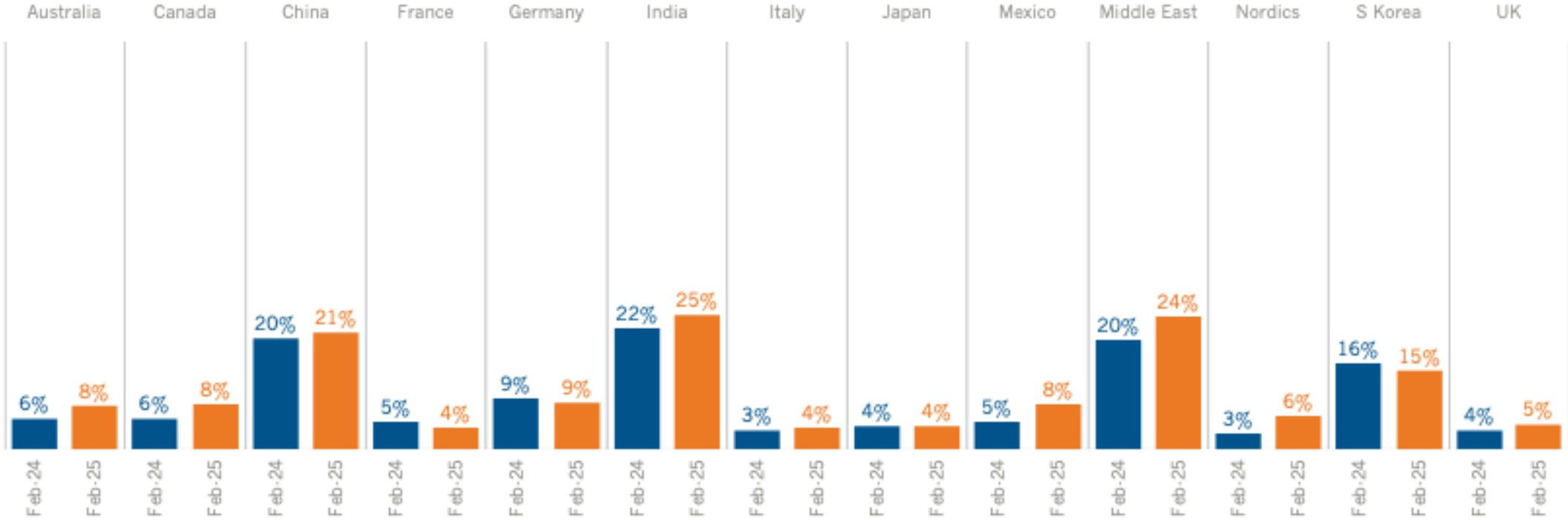
Data reported for: February 2025

Source: YouGov

Barriers to Travel (Travel Restrictions)

The chart below shows travel restrictions as a barrier among international consumers not currently planning an international trip.

Barriers to Travel: Travel Restrictions (% among not planning to travel International in next 12 months)



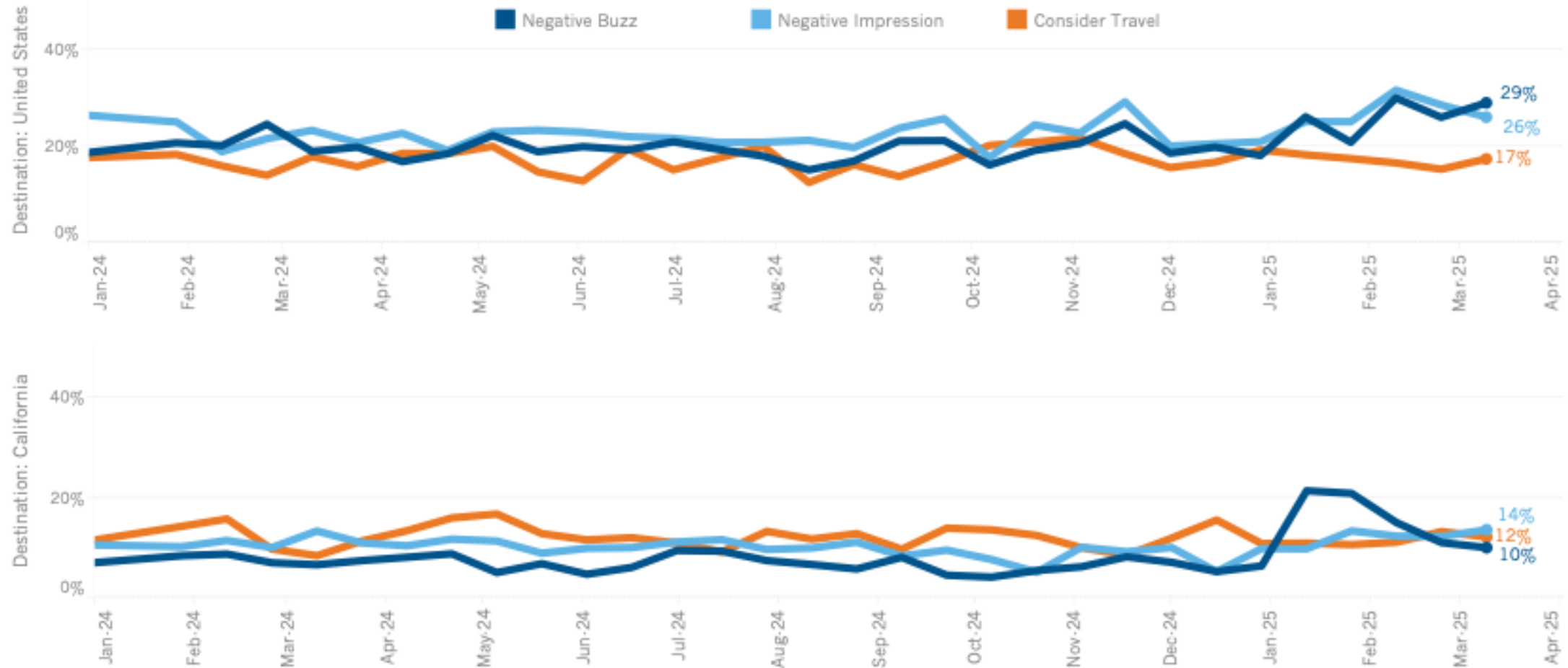
Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported for: February 2025

Source: YouGov

Australia: Sentiment on U.S. & CA

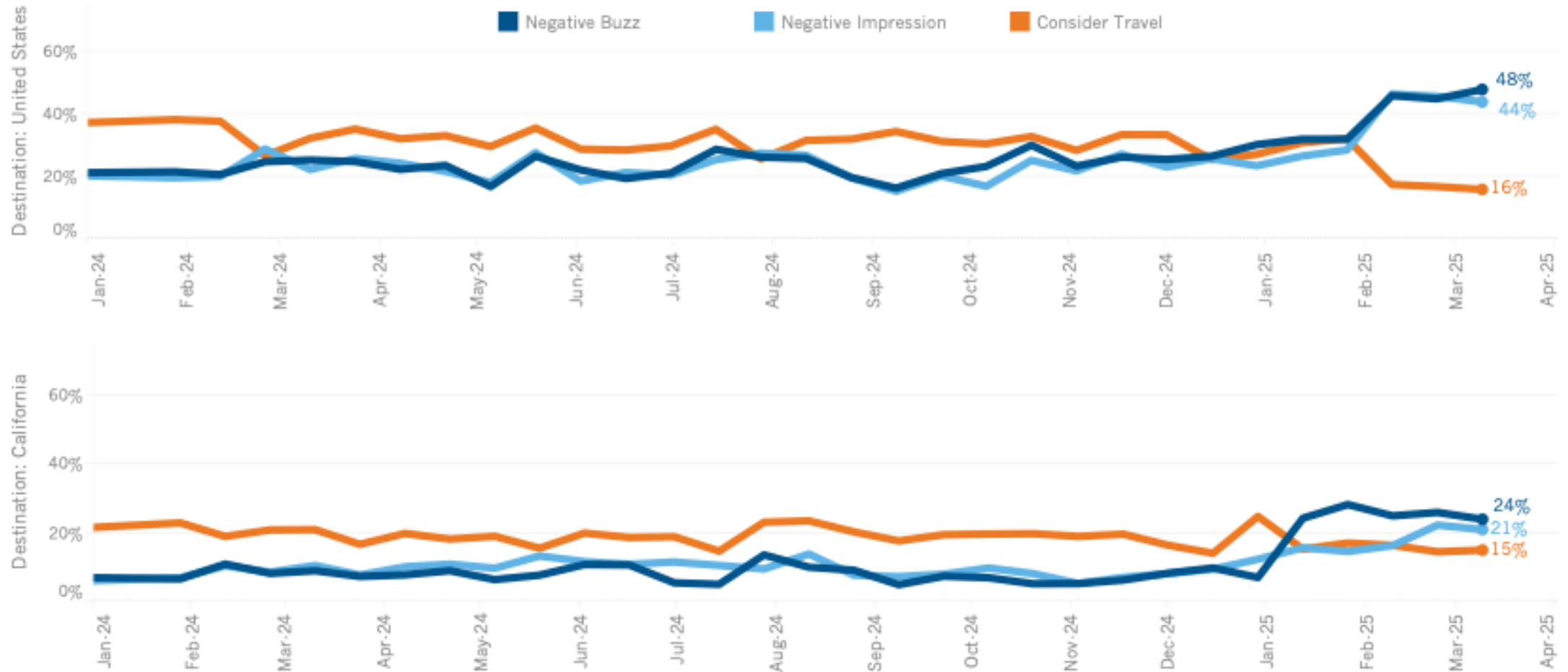
The charts below show consumer sentiment on the United States and California as travel destinations among consumers in the focus market.



Buzz: Heard negative buzz about destination. **Impression:** Have a negative impression of destination. **Consider:** Considering travel to destination.

Canada: Sentiment on U.S. & CA

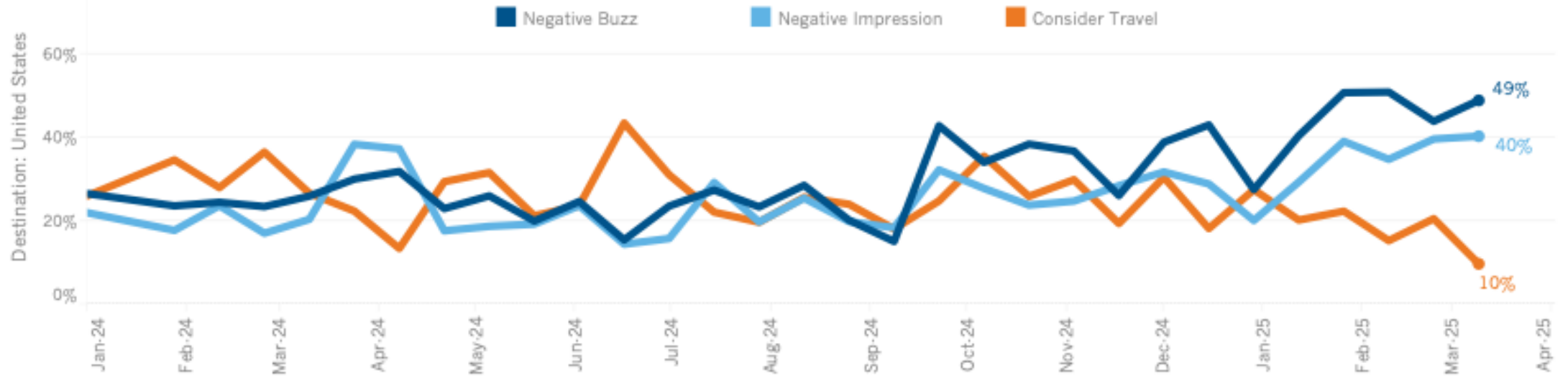
The charts below show consumer sentiment on the United States and California as travel destinations among consumers in the focus market.



Buzz: Heard negative buzz about destination. **Impression:** Have a negative impression of destination. **Consider:** Considering travel to destination.

Mexico: Sentiment on U.S.

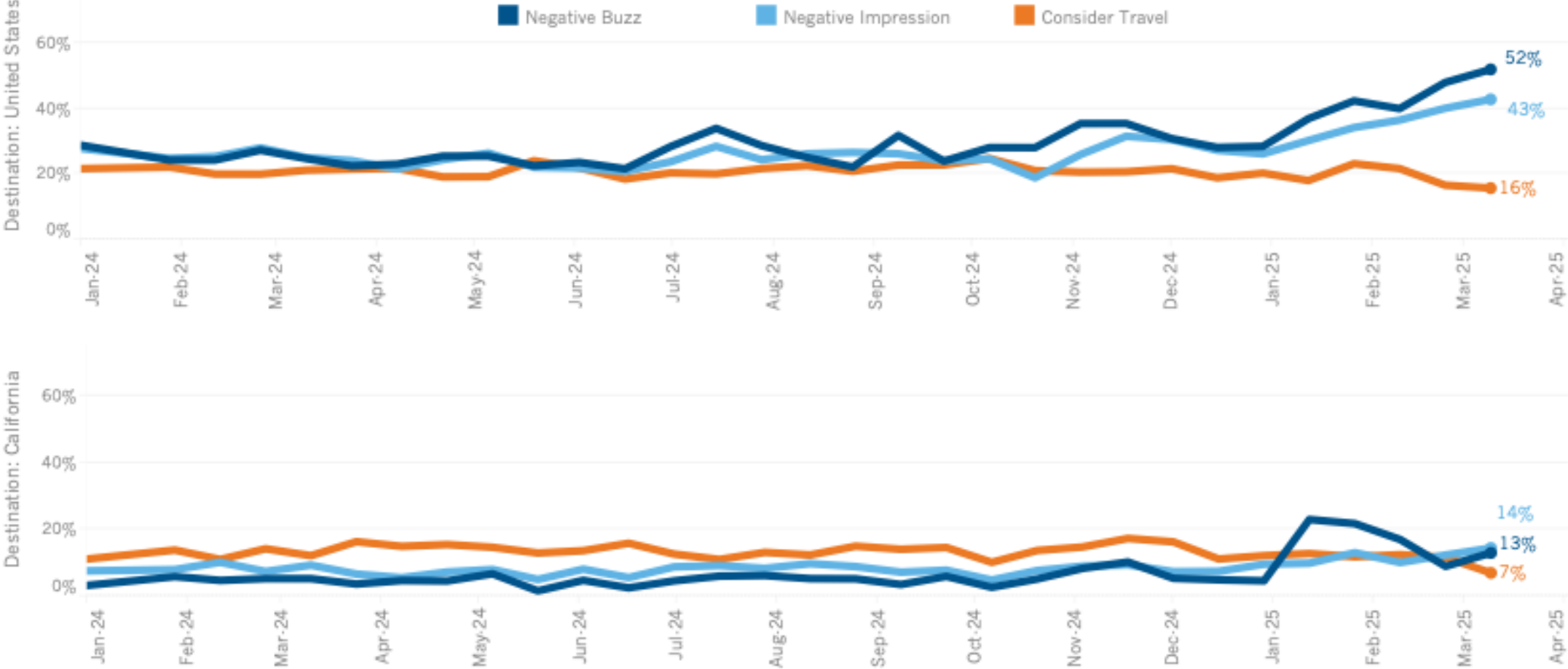
The charts below show consumer sentiment on the United States as a travel destination among consumers in the focus market.



Buzz: Heard negative buzz about destination. **Impression:** Have a negative impression of destination. **Consider:** Considering travel to destination.

UK: Sentiment on U.S. & CA

The charts below show consumer sentiment on the United States and California as travel destinations among consumers in the focus market.



Buzz: Heard negative buzz about destination. **Impression:** Have a negative impression of destination. **Consider:** Considering travel to destination.



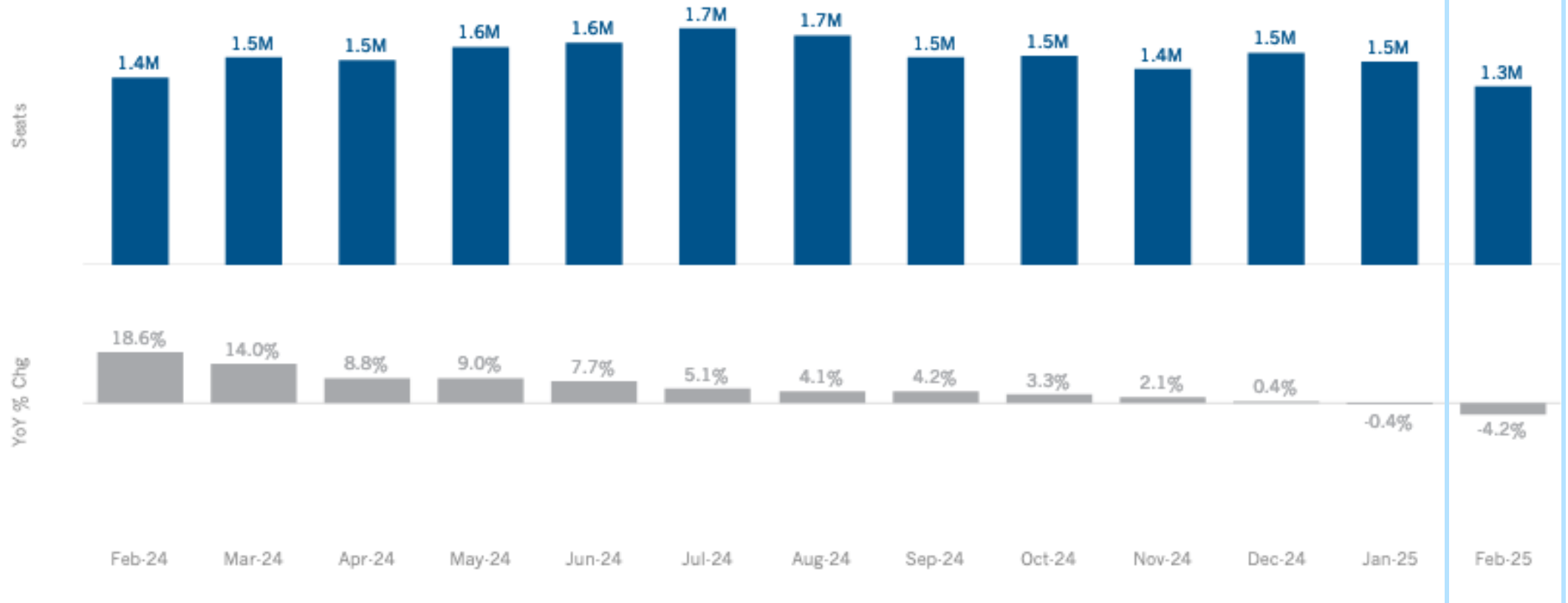
International Indicators: Airlift & Arrivals

- International Non-Stop Seats
- Non-Resident Arrivals

California International Non-Stop Seats

The chart below shows monthly international non-stop seats to California and percent change.

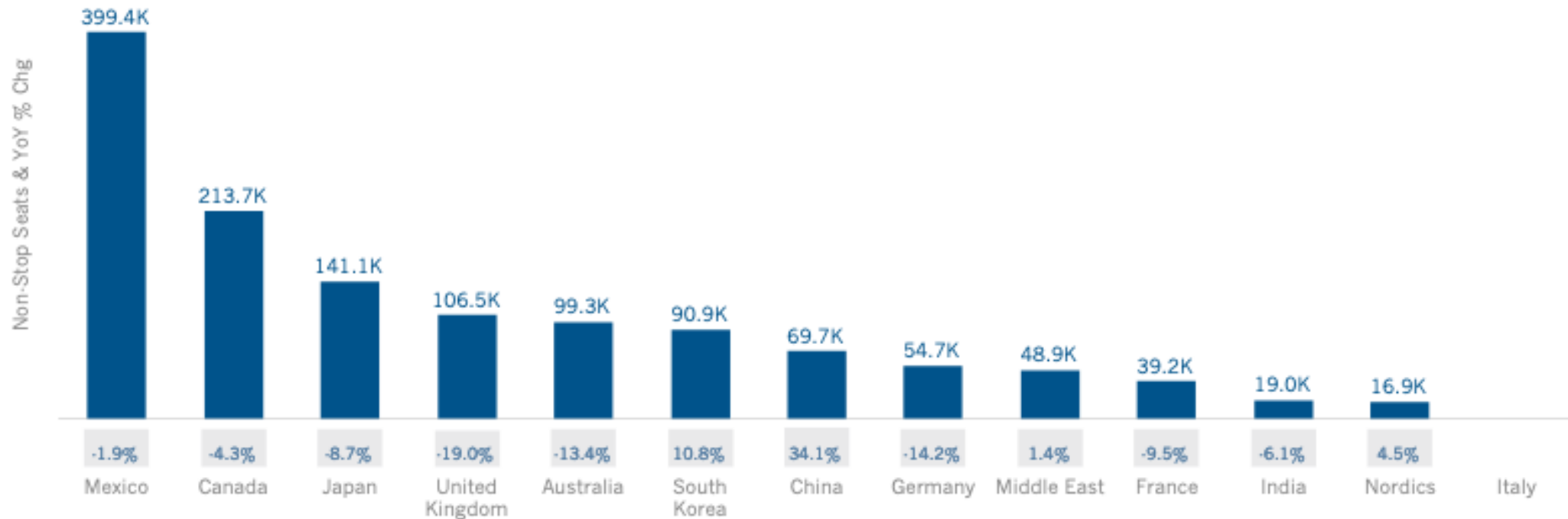
California International Non-Stop Seats (February 2025)



California Int'l Non-Stop Seats by Market

The chart below shows non-stop seats to California by international market for the reporting month.

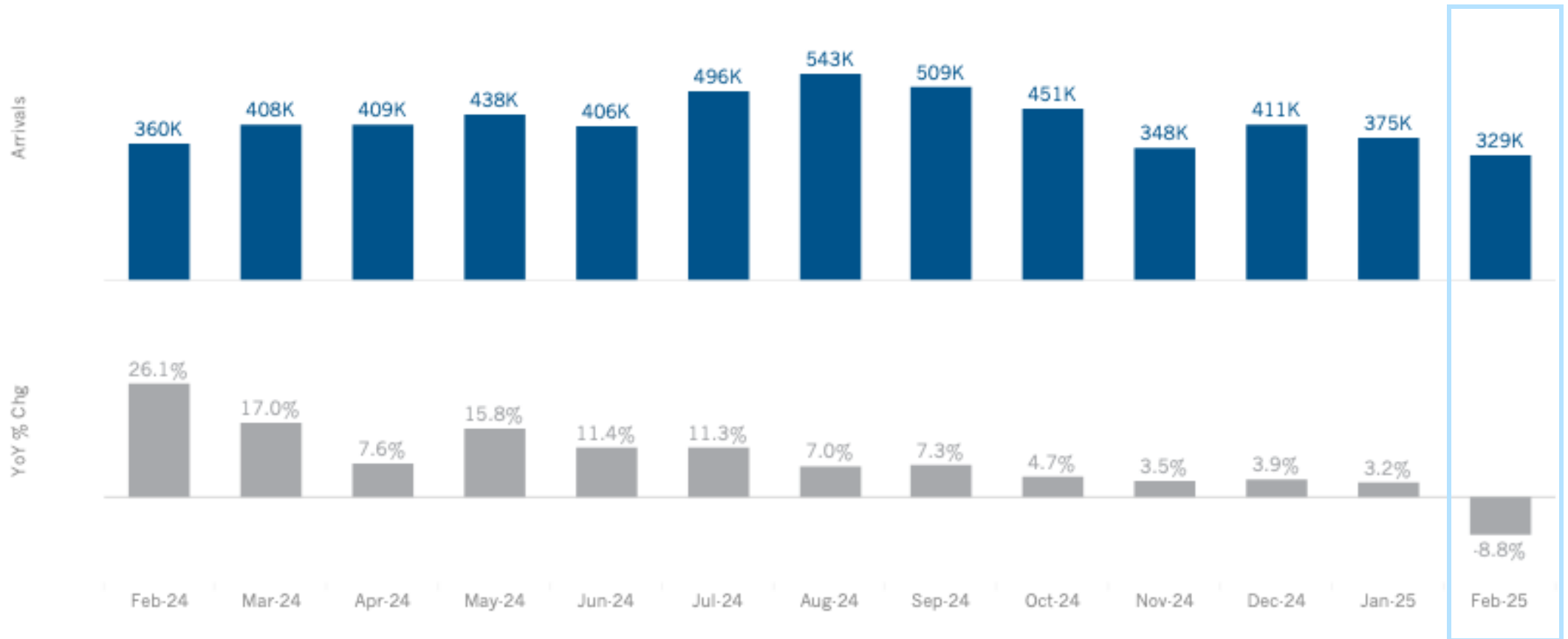
California International Non-Stop Seats (February 2025)



California Non-Resident Arrivals

The chart below shows total international non-resident arrivals at California's ports of entry and percent change.

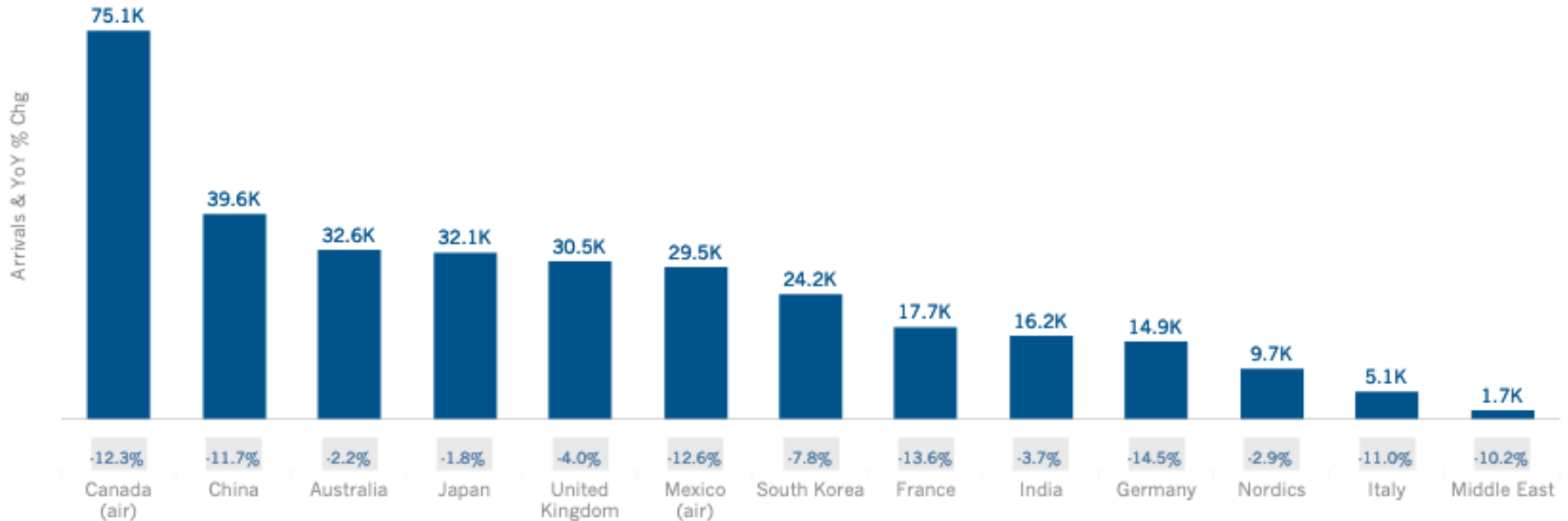
California Non-Resident Arrivals- Ports of Entry (February 2025)



California Non-Resident Arrivals by Market

The chart below shows non-resident arrivals at California's ports of entry by international market for the reporting month.

California Non-Resident Arrivals- Ports of Entry (February 2025)





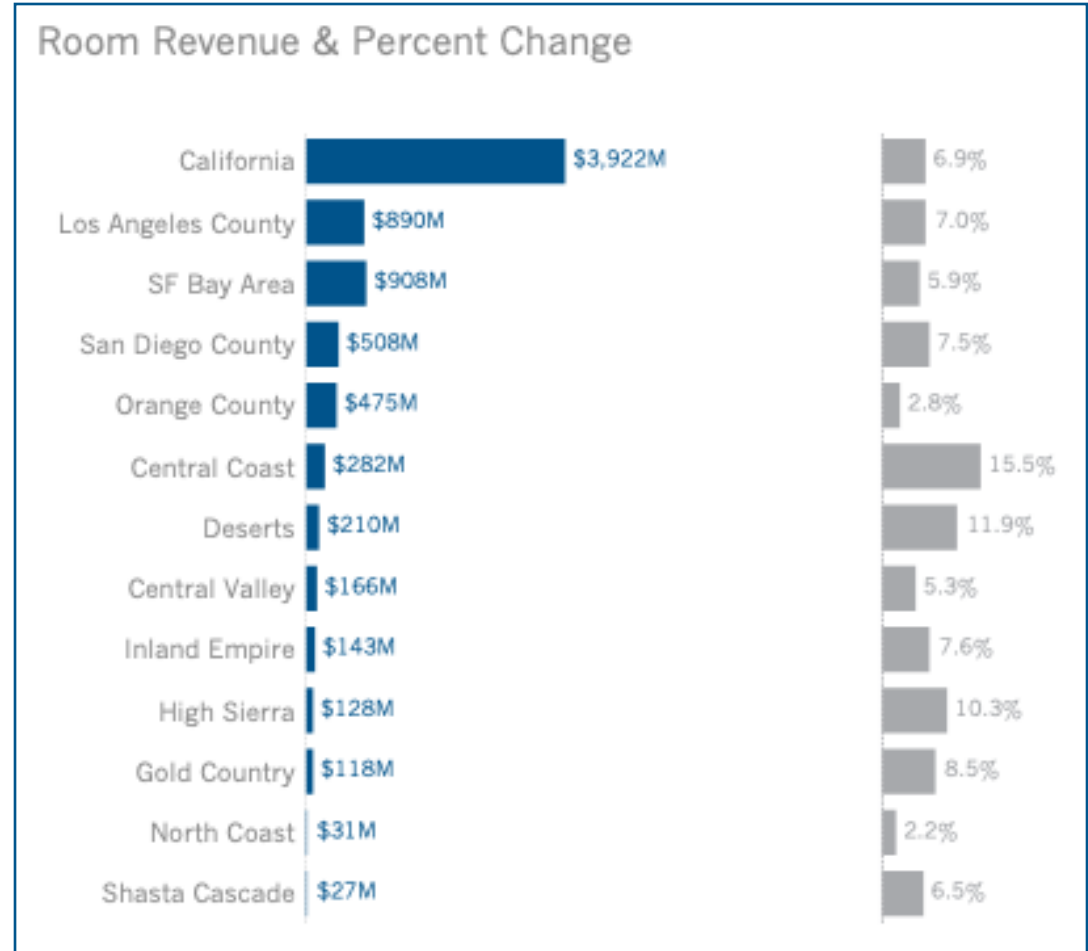
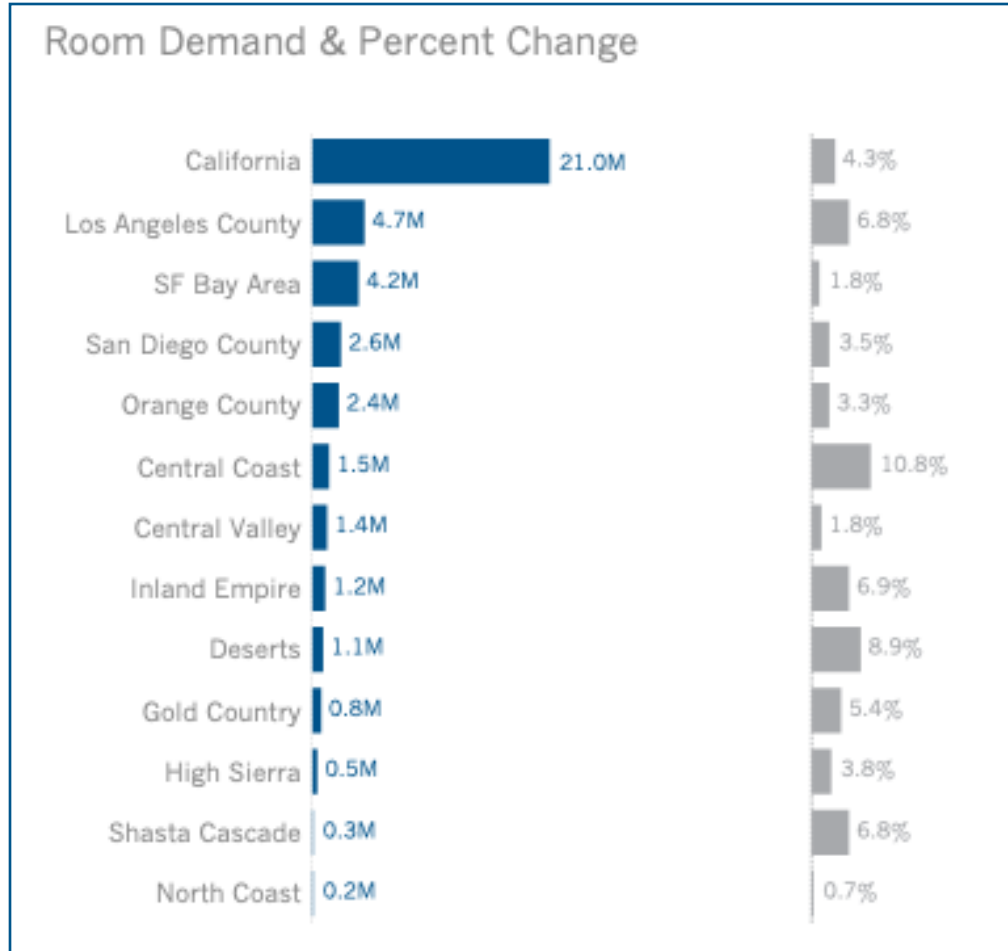
Appendix:

YTD Metrics

- Lodging Performance
- International Airlift
- International Arrivals

California & Regions Room Demand (YTD)

The chart below shows California and regions hotel room demand and revenue year-to-date and percent change to prior year.

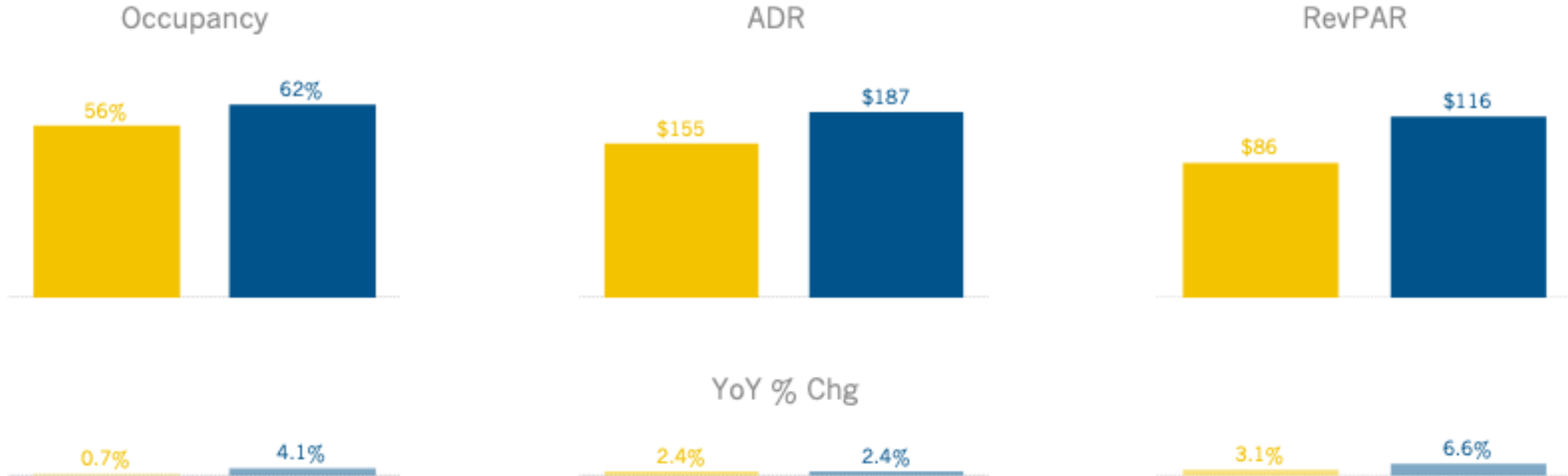


U.S. & California Hotel Metrics (YTD)

The charts below show key hotel metrics and percent change for the U.S. and California for year-to-date.

U.S. & California Hotel Performance Metrics (YTD)

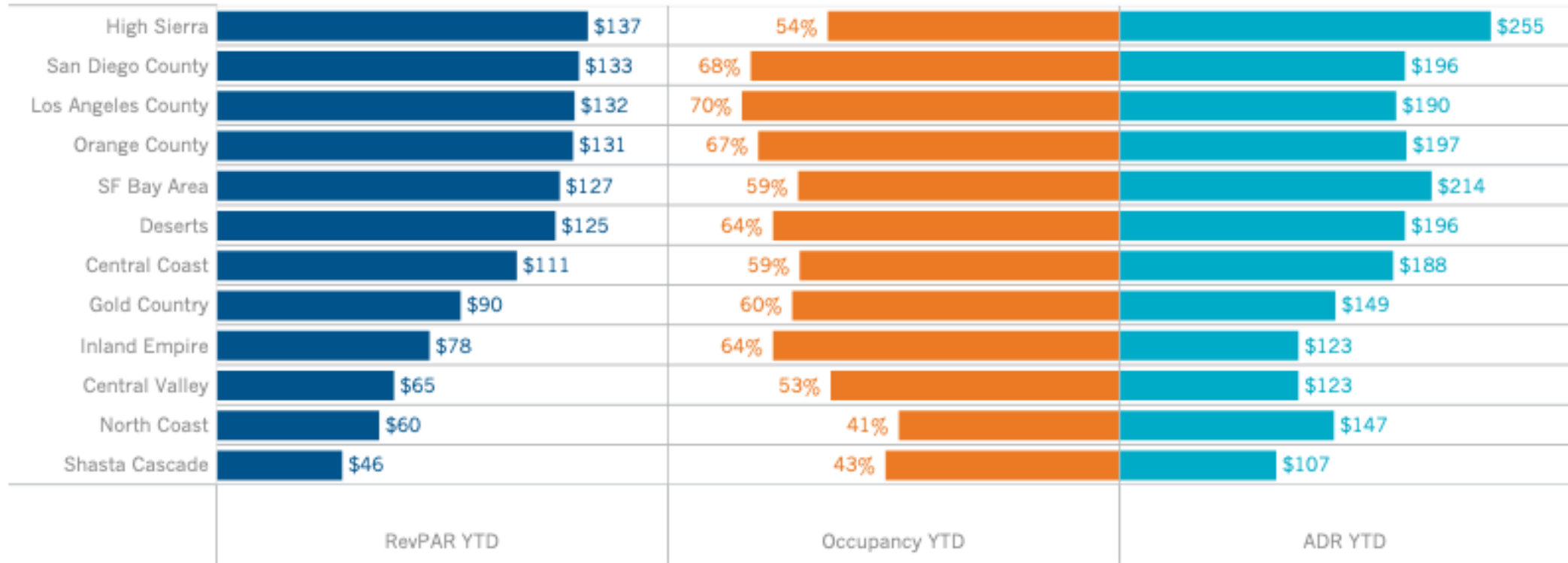
■ U.S. ■ California



California Region Hotel Metrics (YTD)

The charts below show key hotel metrics and percent change for the California tourism regions for year-to-date.

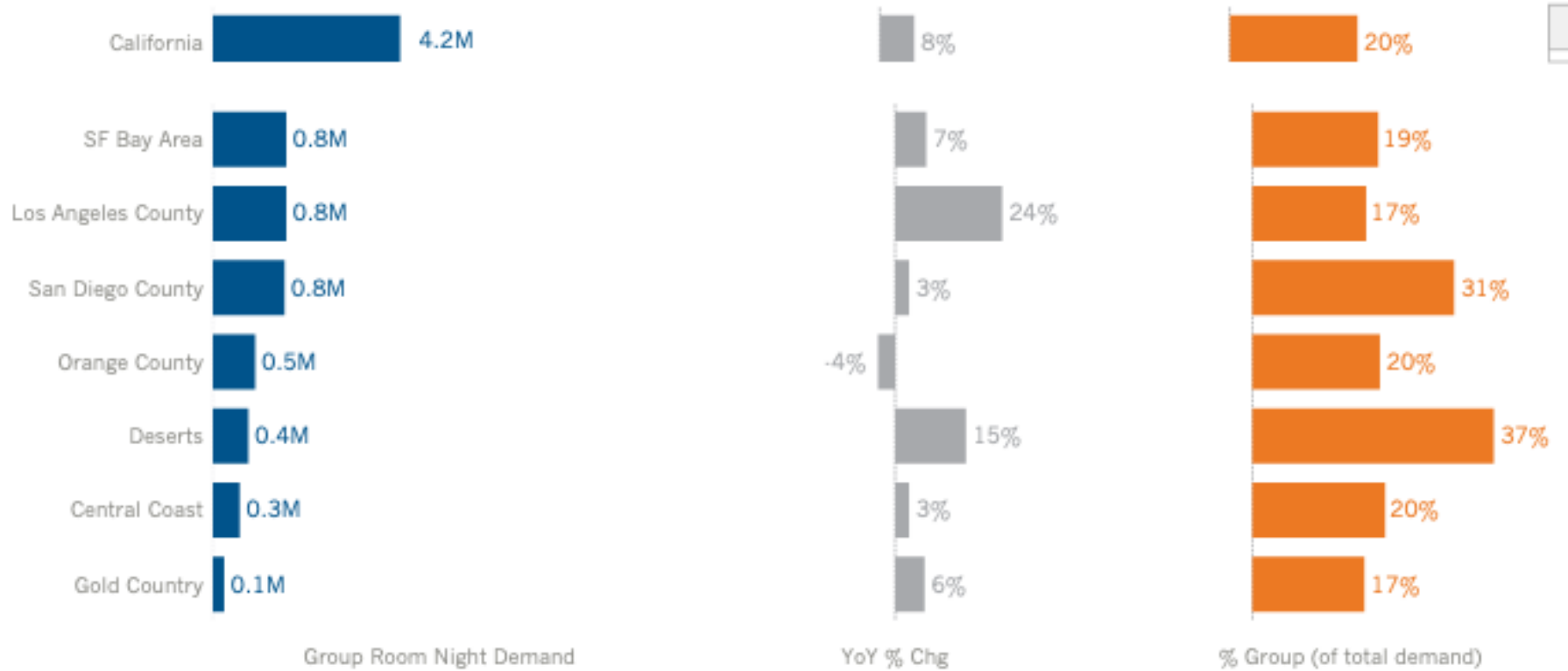
California Region Hotel Performance Metrics (YTD)



California Hotel Group Room Demand (YTD)

The chart below shows group room demand by market, percent change, & percent of total demand for year-to-date.

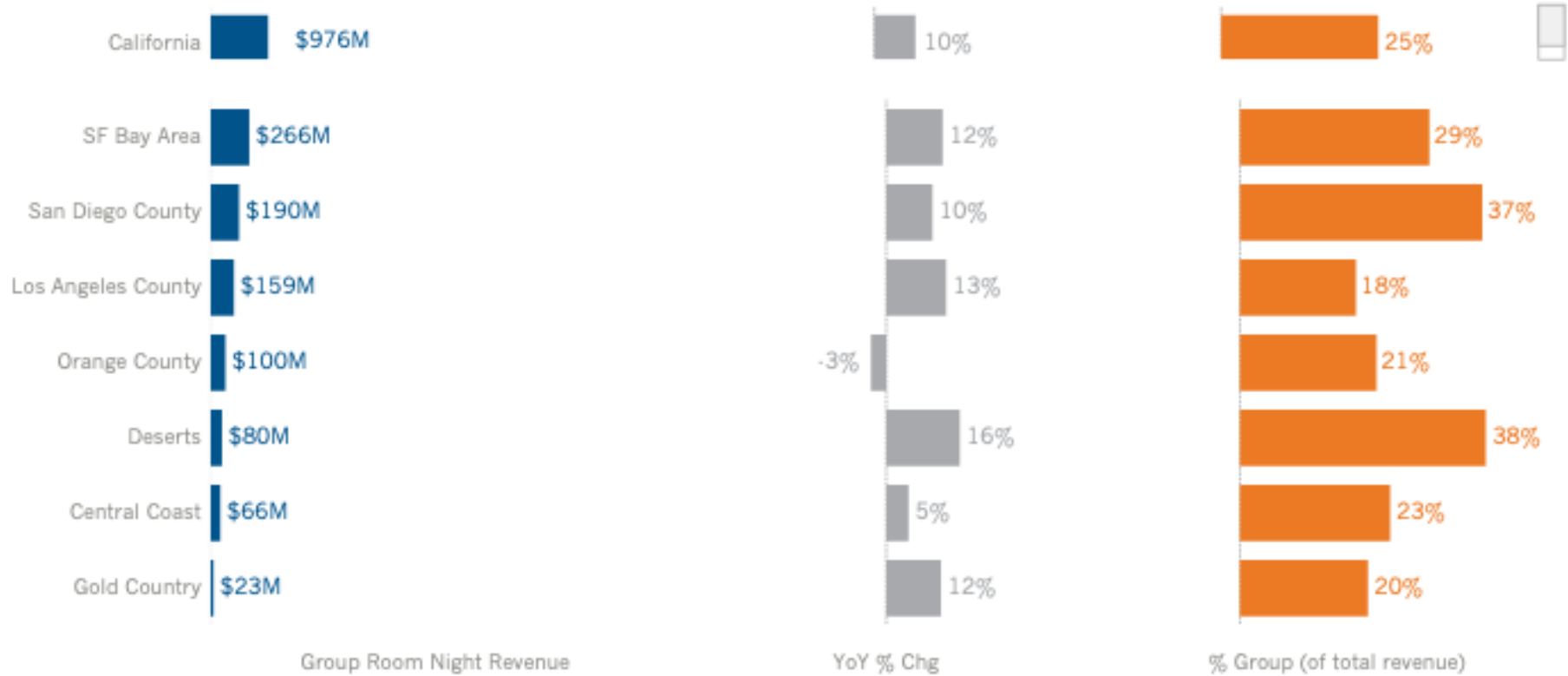
California & Regions Hotel Group Room Night Demand (YTD)



California Hotel Group Room Revenue (YTD)

The chart below shows group room revenue by market, percent change, & percent of total demand for year-to-date.

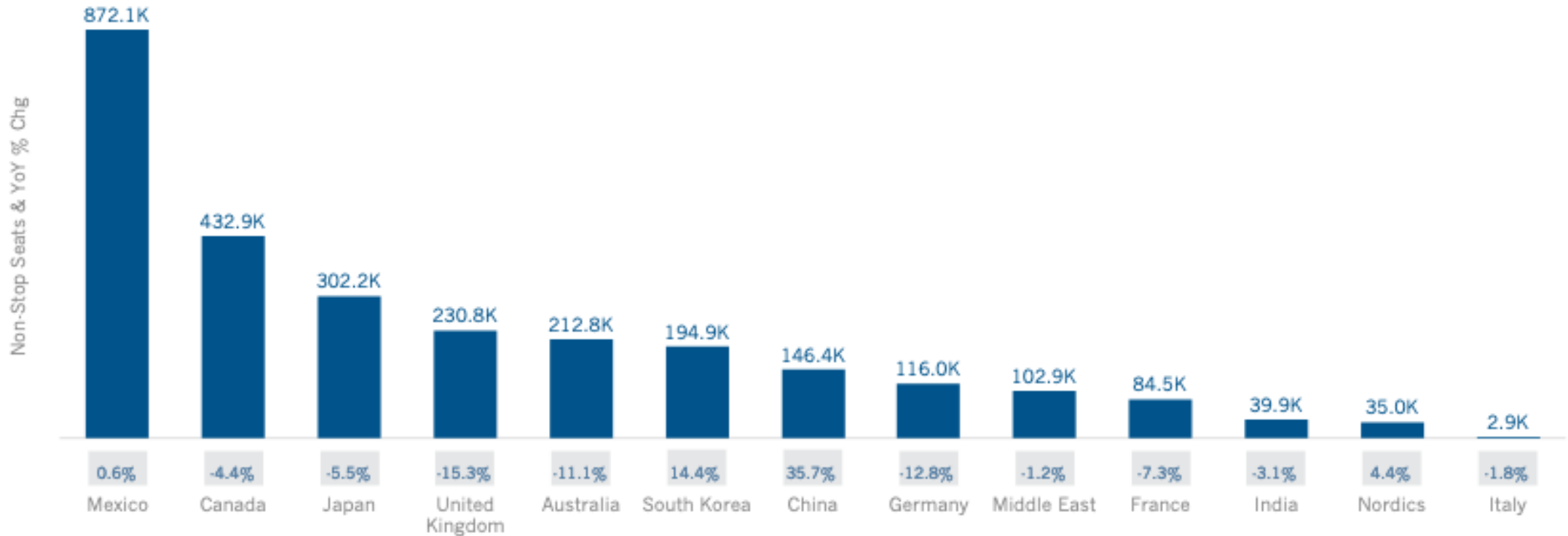
California & Regions Hotel Group Room Night Revenue (YTD)



California Int'l Non-Stop Seats by Market (YTD)

The chart below shows non-stop seats to California by international market for year-to-date.

California International Non-Stop Seats (YTD)



California Non-Resident Arrivals by Market

The chart below shows non-resident arrivals at California's ports of entry by international market for year-to-date.

California Non-Resident Arrivals- Ports of Entry (YTD)

