



Monthly Travel Indicators Summary

January 2025

March 11, 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 2025)

Visitor spending in California is projected to grow by 6% in 2025, with domestic spending increasing nearly 4%. This forecast does not account for the wildfire events in Los Angeles or recent policy decisions by the Trump administration.

- According to the February forecast from Tourism Economics, prepared for Visit California, the state is expected to generate \$166.1 billion in travel spending in 2025, a 6% increase over 2024.
- Domestic leisure spending is forecast to reach \$135 billion, reflecting a \$5 billion increase and 3.8% growth compared to 2024.

Macroeconomic

The U.S. economy sent mixed signals in January, as the Consumer Price Index (CPI) rose again, reaching 3%, while consumer confidence declined following a post-election upswing. However, job growth remained solid, and the unemployment rate fell to 4.0%.

- Inflation increased by 3% in January, marking the fourth consecutive month of rising prices. The national average retail price for a gallon of gas was \$3.20, up from \$3.14 the previous month, while the average price in California stood at \$4.31.
- A preliminary estimate showed that 143,000 jobs were added to the economy in January, with the unemployment rate holding at 4.0%.
- The University of Michigan's U.S. Consumer Sentiment Index measured 71.1 for the month, down from 74 in December.

Consumer Sentiment

As with the broader macroeconomic outlook, travel-specific consumer sentiment indicators were mixed for the month. Travel costs were increasingly cited as a deterrent, and consumers remained cautious about their financial outlook and travel budgets. As noted previously, Californians were more cautious in their economic outlook post-election compared to the overall U.S. travel consumer.

- Consumer tracking from Future Partners found that travel costs remained a top barrier over the past six months, with 38% of U.S. travelers saying travel is currently too expensive. California residents were slightly less likely to cite travel costs (37%) but were more likely to identify gas prices and airfare as barriers compared to the U.S. overall.
- Fewer than one-third (29%) of American travelers felt optimistic about their current financial situation compared to a year ago, while California residents were slightly more optimistic at 35%. However, travelers expressed greater confidence in their future economic situation, with 51% of U.S. travelers and 49% of California residents expecting improvement.
- Despite a decline in positivity in January, excitement for future travel remained high, with 86% of U.S. travelers and 85% of California residents saying they were excited about leisure travel in the next 12 months.
- Additionally, 40% of American travelers and 53% of California travelers said they were considering international leisure travel within the next 12 months.

Executive Summary Domestic (continued)

Lodging

The wildfires in Los Angeles in January did not directly impact the region's hotel and tourism infrastructure, and key performance indicators (KPIs) for the month showed positive year-over-year growth despite the disruption. However, these high-level metrics do not fully capture the complex effects of the tragic events that disrupted the travel industry. While initial closures and visitor declines affected some areas, evacuee and recovery-related demand helped offset losses in certain cases. Some parts of the Los Angeles region experienced noticeable declines in occupancy, yet overall, the state posted a 5% increase in demand and an 8% rise in revenue.

- Hotel room demand in California grew by 5% year over year in January, while room revenue increased by 8%.
- The state's monthly occupancy rate reached 60% (+5% YOY), with an average daily rate (ADR) of \$187 (+2% YOY) and revenue per available room (RevPAR) of \$112 (+7% YOY). The week ending January 18 saw particularly strong performance, with RevPAR surging 47%.
- Group room demand increased by 3% compared to January 2024, while room revenue rose by 5%.
- For January, the occupancy rate for short-term vacation rentals in California stood at 47% (+5% YOY), with ADR rising 7%, leading to a 12% year-over-year increase in RevPAR.

Airlift

National air passenger traffic, as measured by TSA checkpoints, increased by 2% year over year, while nonstop domestic seat capacity to California grew by nearly 2%.

- In total, 66 million passengers were screened at TSA checkpoints nationwide for the month, reflecting a 2% year-over-year increase. At California airports, screenings remained flat at 8 million travelers.
- Nonstop domestic seat capacity to California destinations totaled 8.8 million for the month, up 2% year over year.

Executive Summary International

Forecast (updated February 2025)

While international tourism presents the greatest growth opportunity for California's tourism industry, there are significant downside risks to the forecast. As of February, international spending in California was projected to grow by 18% in 2025. However, a strong U.S. dollar and geopolitical challenges may hinder this level of growth. The forecast does not account for recent wildfire events in Los Angeles and policy decisions by the Trump administration.

- According to Tourism Economics' February forecast prepared for Visit California, international visitor spending in the state is expected to increase by 18% in 2025, reaching a record \$31.3 billion.
- California's largest spending markets are projected to be its North American neighbors, Mexico and Canada, with visitor spending of \$5.4 billion and \$4.3 billion, respectively.
- Among overseas markets, China is forecast to be the most significant, with visitor spending projected to reach \$3.2 billion in 2025. India is expected to be the second-largest overseas market, with visitor spending anticipated to grow by 16% to \$1.7 billion.

Consumer Sentiment

Consumer sentiment around travel from Visit California's 13 priority markets remained consistent with prior months, with price continuing to be the top barrier.

- 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 January 2024 and up from 38% in the same month two years ago.
- Travel costs remained the primary barrier, cited by 44% of respondents, in line with January 2024. Overall, responses across the priority markets were comparable to the previous year.
- In the Asia-Pacific, India, and Middle East markets, safety and health concerns remained secondary barriers to travel.

Airlift/Arrivals

Airlift growth from California's 13 priority markets has slowed in recent months and remained essentially flat for the month, while arrivals at California's ports of entry grew modestly by 3%. China was a notable bright spot, with both airlift capacity and arrivals posting strong growth.

- In total, there were 1.5 million nonstop seats to California from Visit California's 13 priority markets for the month, down less than 1% from January 2024. Among overseas markets, the U.K. and Japan had the highest number of nonstop seats to California. China (+37%) and South Korea (+18%) continued to lead in airlift growth.
- Non-resident arrivals from priority markets through California's ports of entry maintained a growth trajectory, increasing by 3% for the month. Arrivals from China surged 36% year over year, likely driven by pre-Lunar New Year travel.

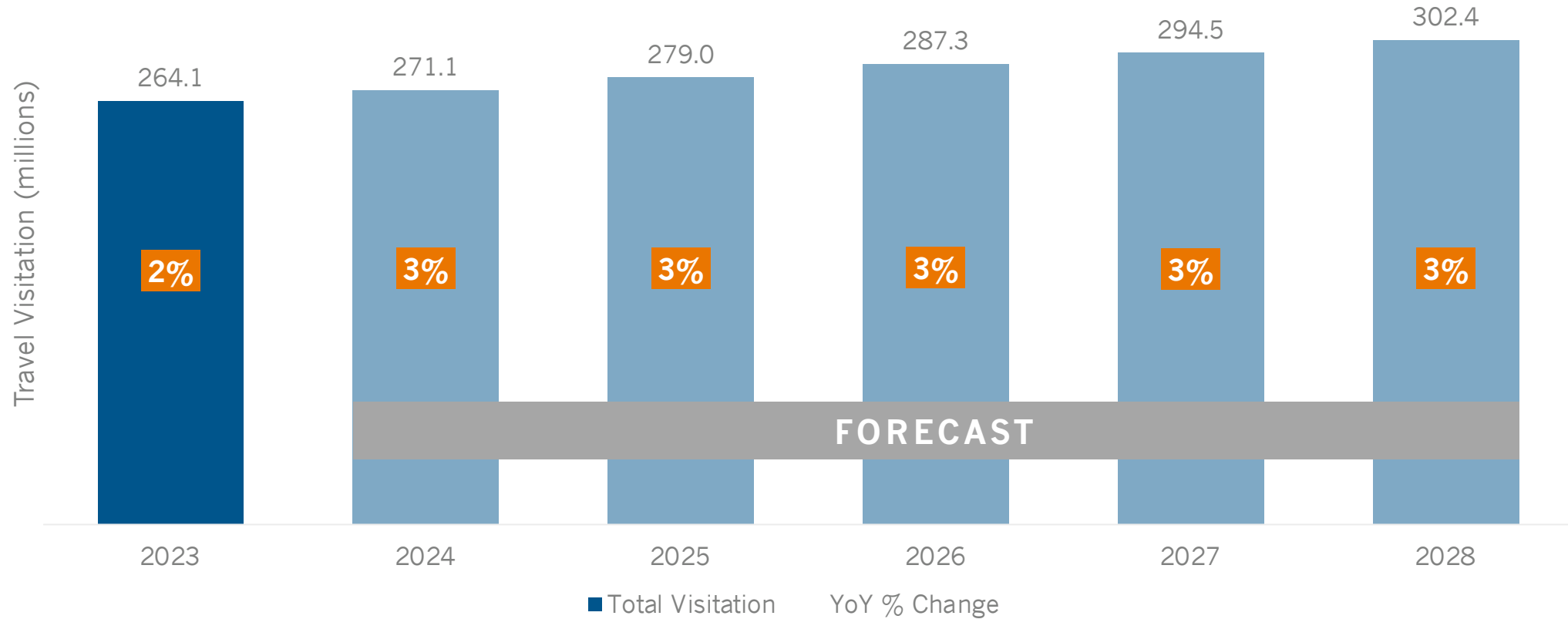


Domestic Indicators: Forecast

- Total Visitation & Spending Forecast
- Domestic Spending Forecast

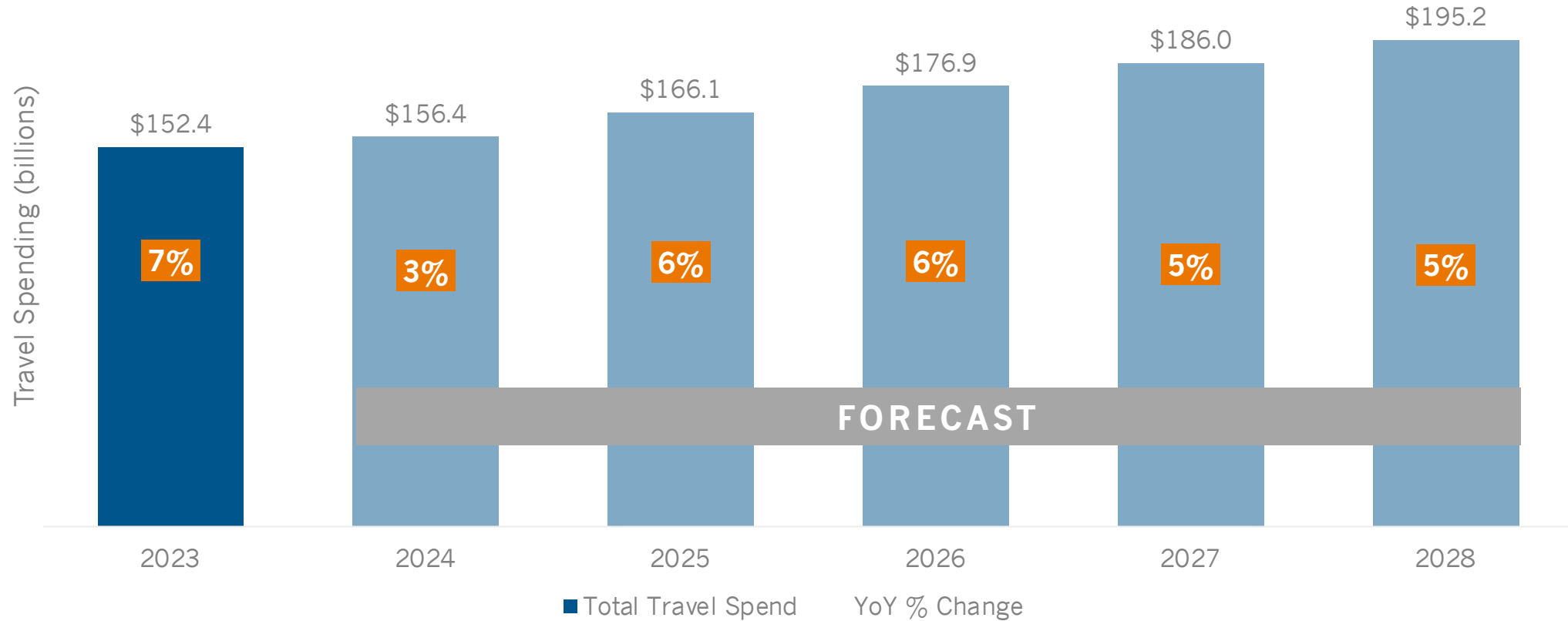
California Visitation Forecast

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



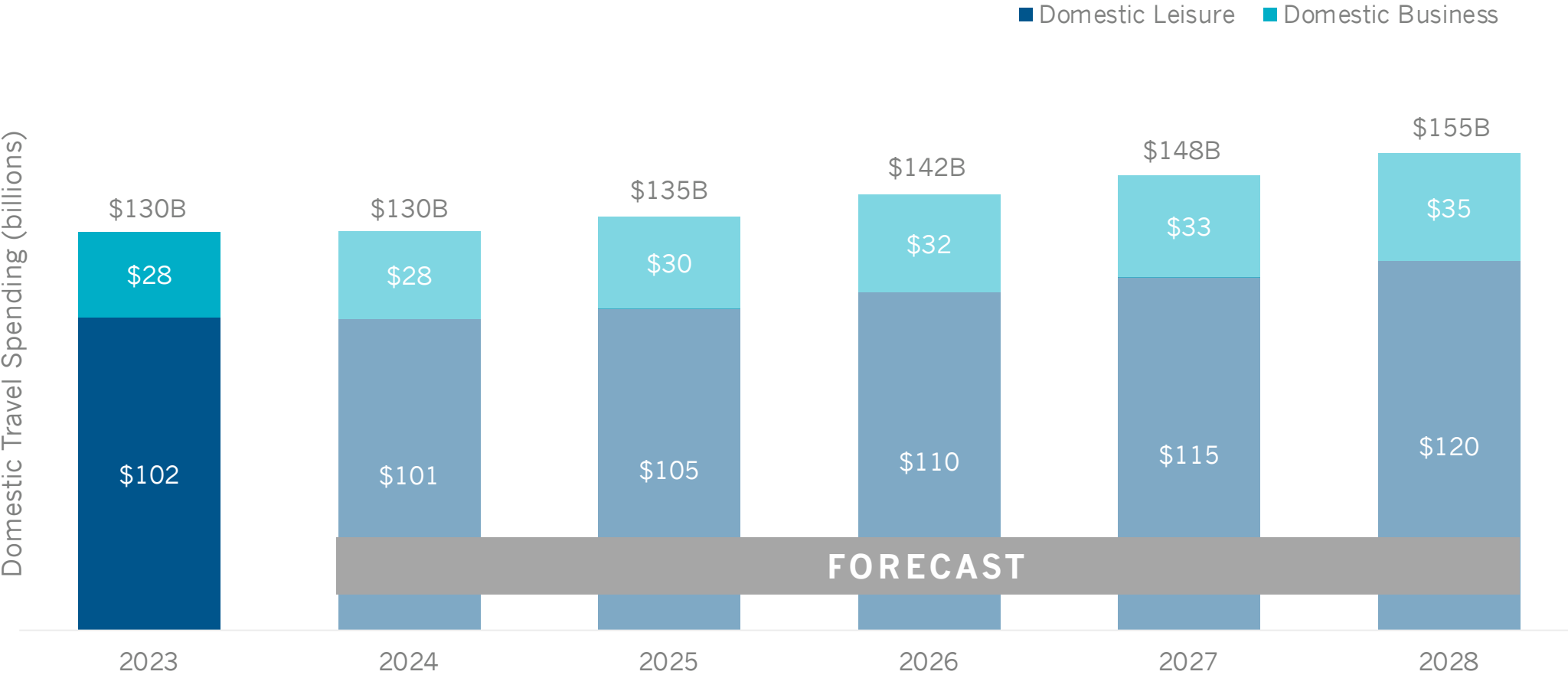
California Spending Forecast

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



California Domestic Spending Forecast

The chart below shows the current travel spending forecast by domestic leisure and business segments.



Source: Tourism Economics (February 2025)



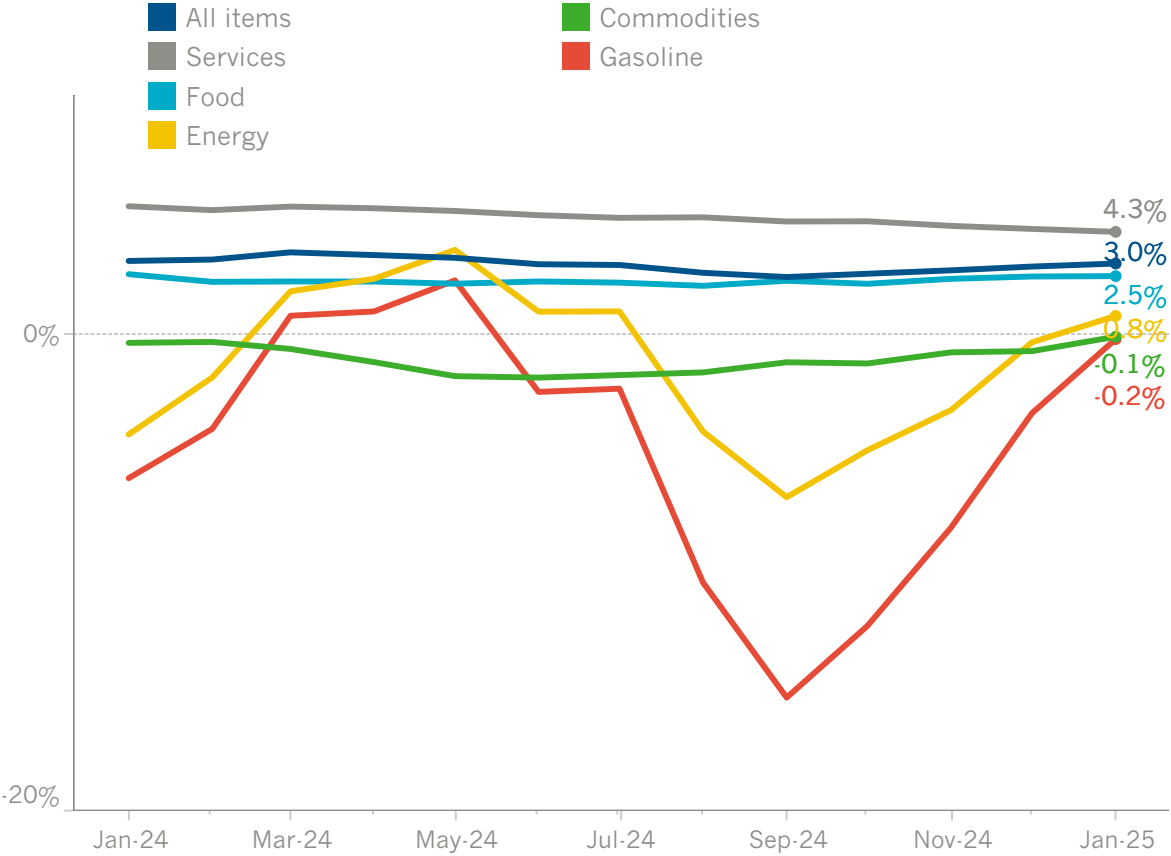
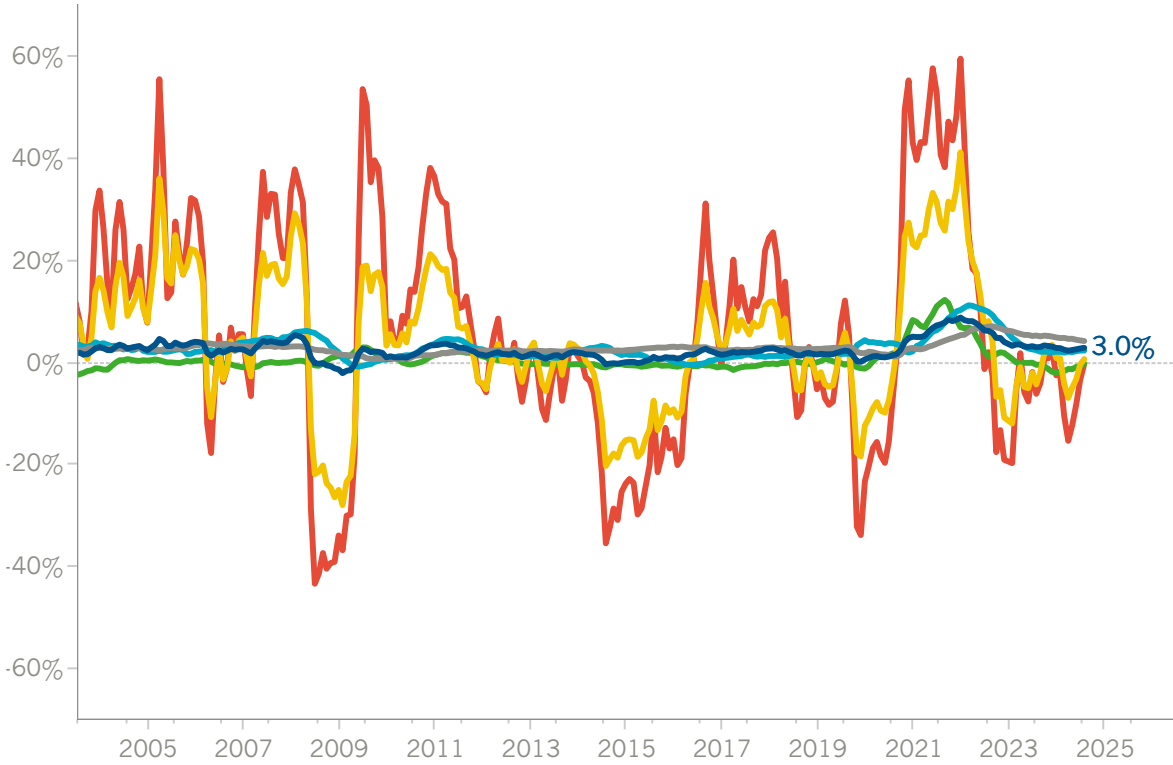
Domestic Indicators: Macroeconomic

- Inflation Rate
- 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.

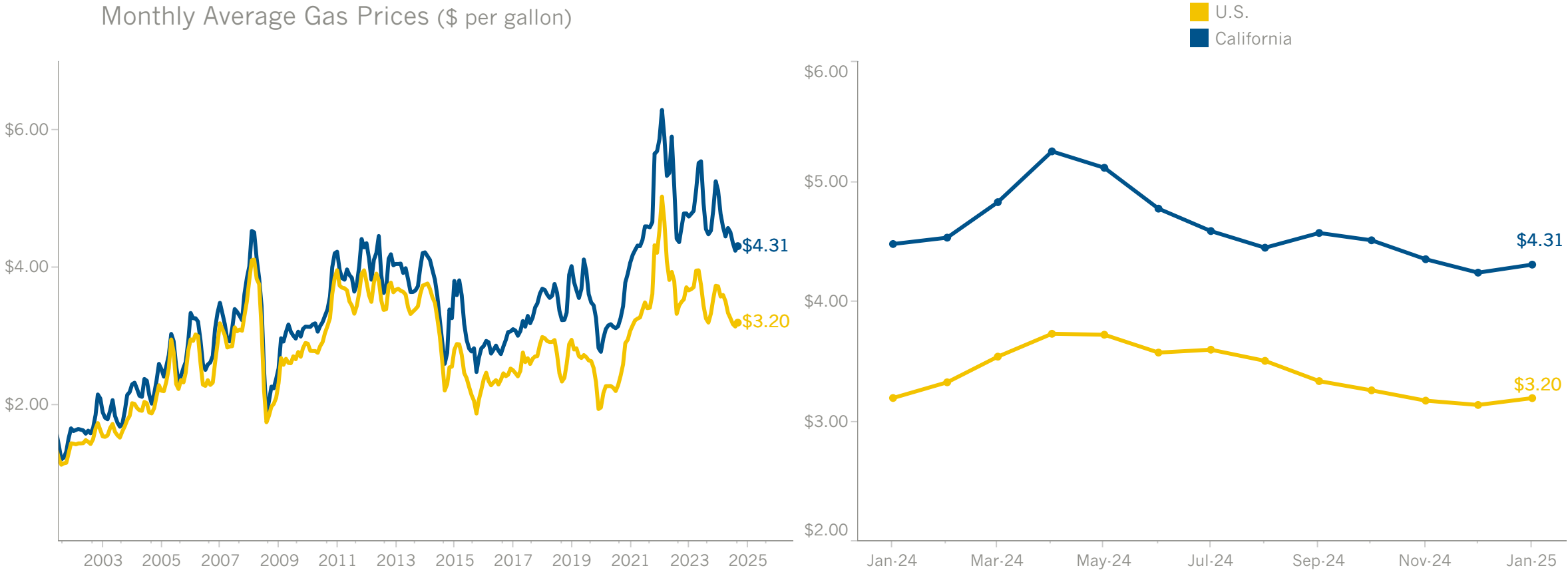
Monthly Consumer Price Index by Category (YOY % Chg)



U.S. & California Gas Prices

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

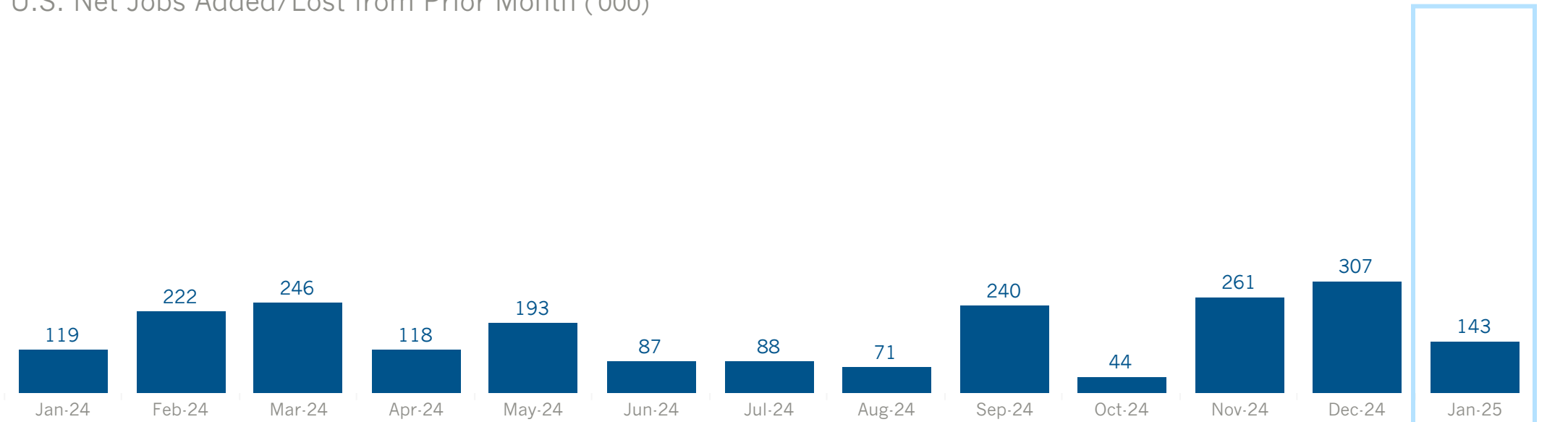
Monthly Average Gas Prices (\$ per gallon)



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)



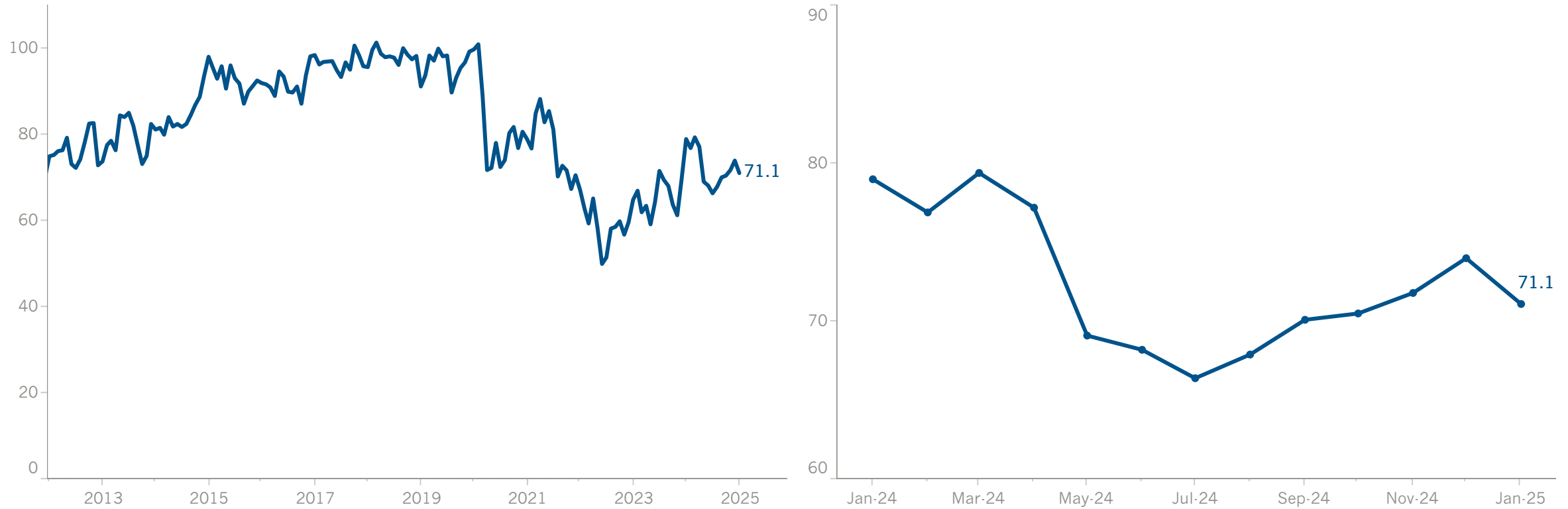
U.S. Unemployment Rate (%)

3.7%	3.9%	3.8%	3.9%	4.0%	4.1%	4.3%	4.2%	4.1%	4.1%	4.2%	4.1%	4.0%
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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

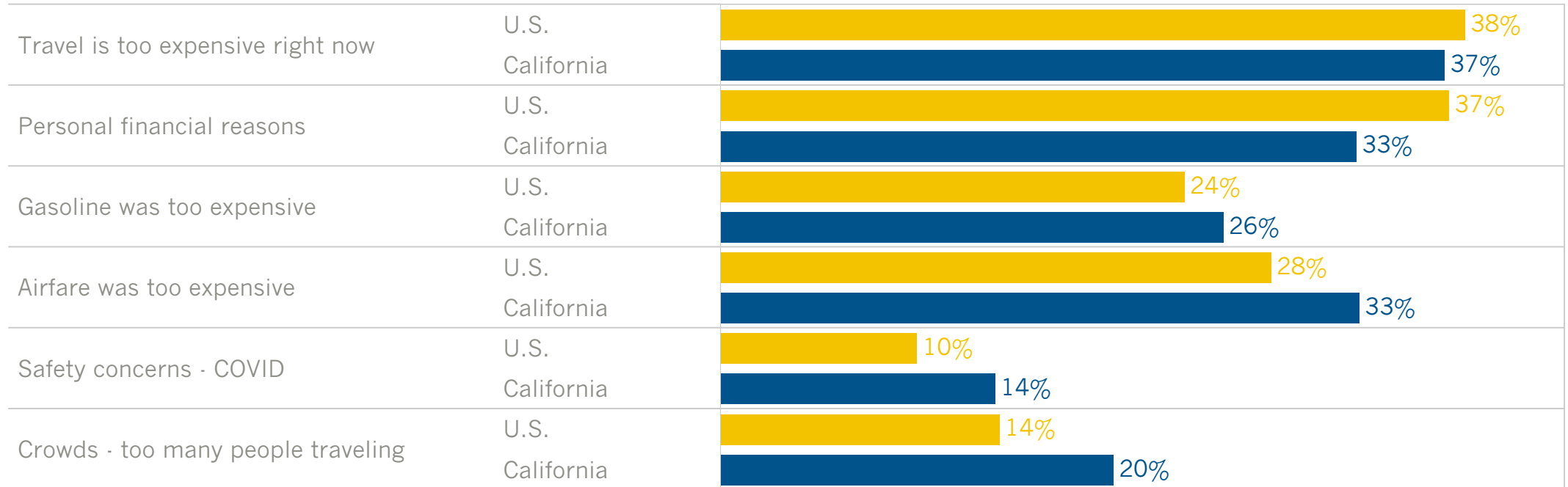
- Travel Deterrents
- Perceptions of Financial Situation
- Travel as a Budget Priority
- Expectations for Travel Spending
- Excitement for Travel
- International Travel Intent

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)

vs. Prior Month



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

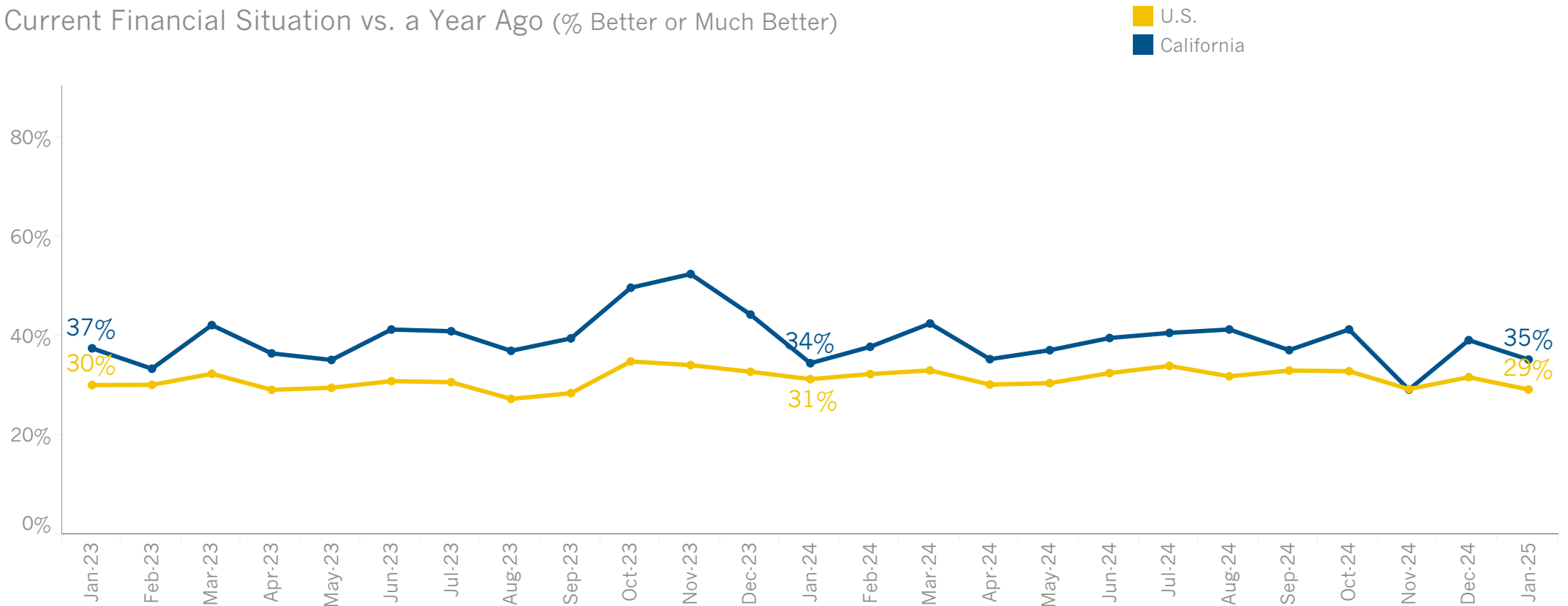
Data reported for: January 2025

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?

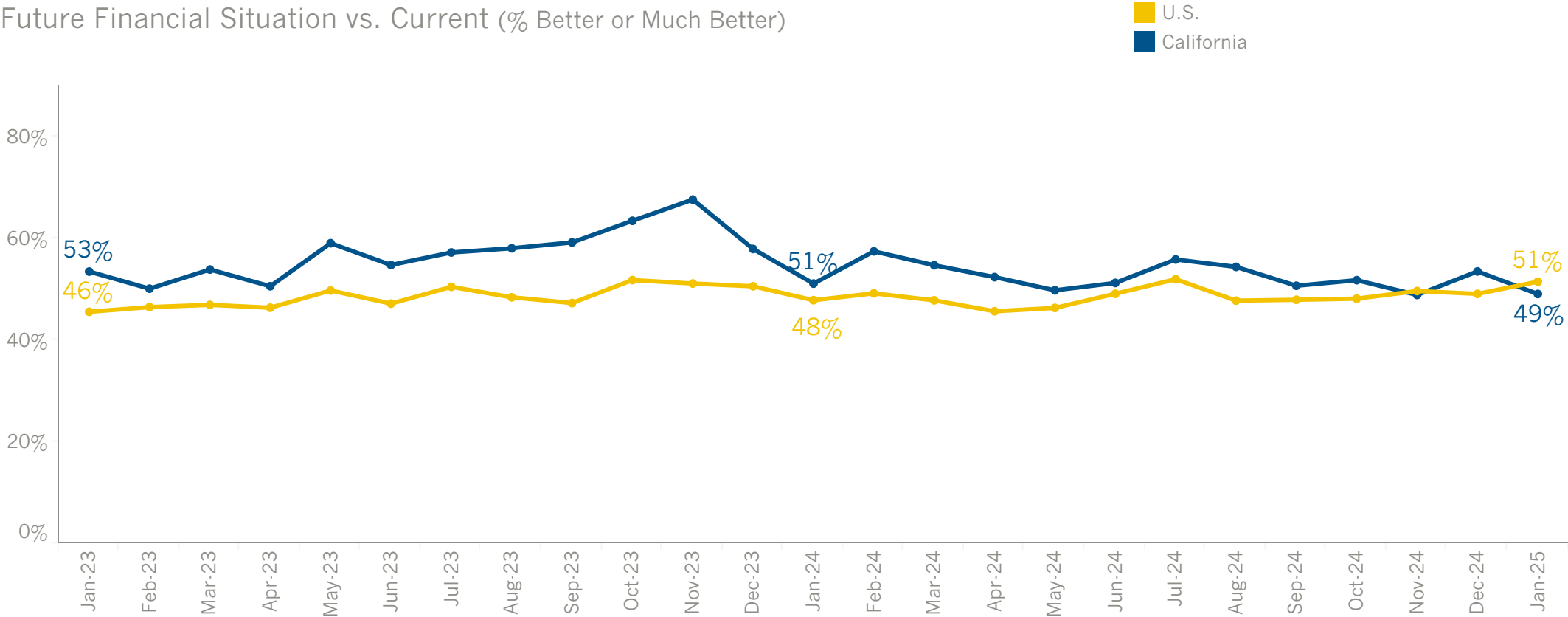
Data reported for: January 2025

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: January 2025

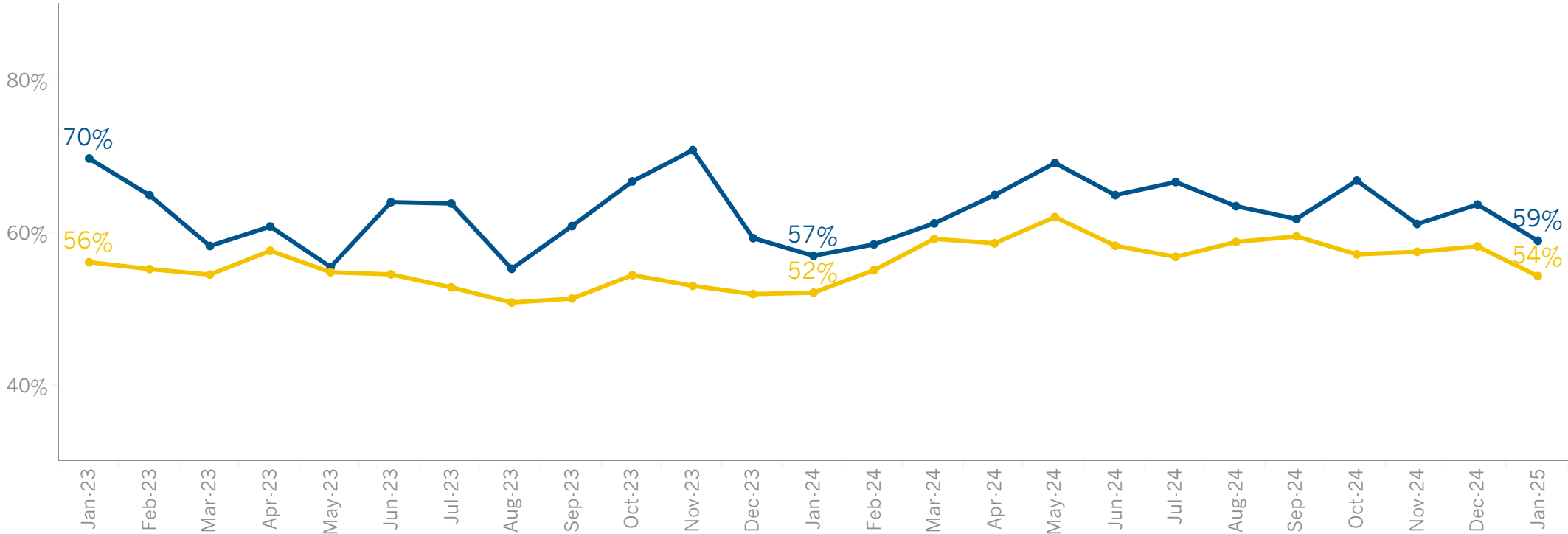
Source: Future Partners, *The State of the American Traveler*

U.S. & California Budget Priorities (Leisure Travel)

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



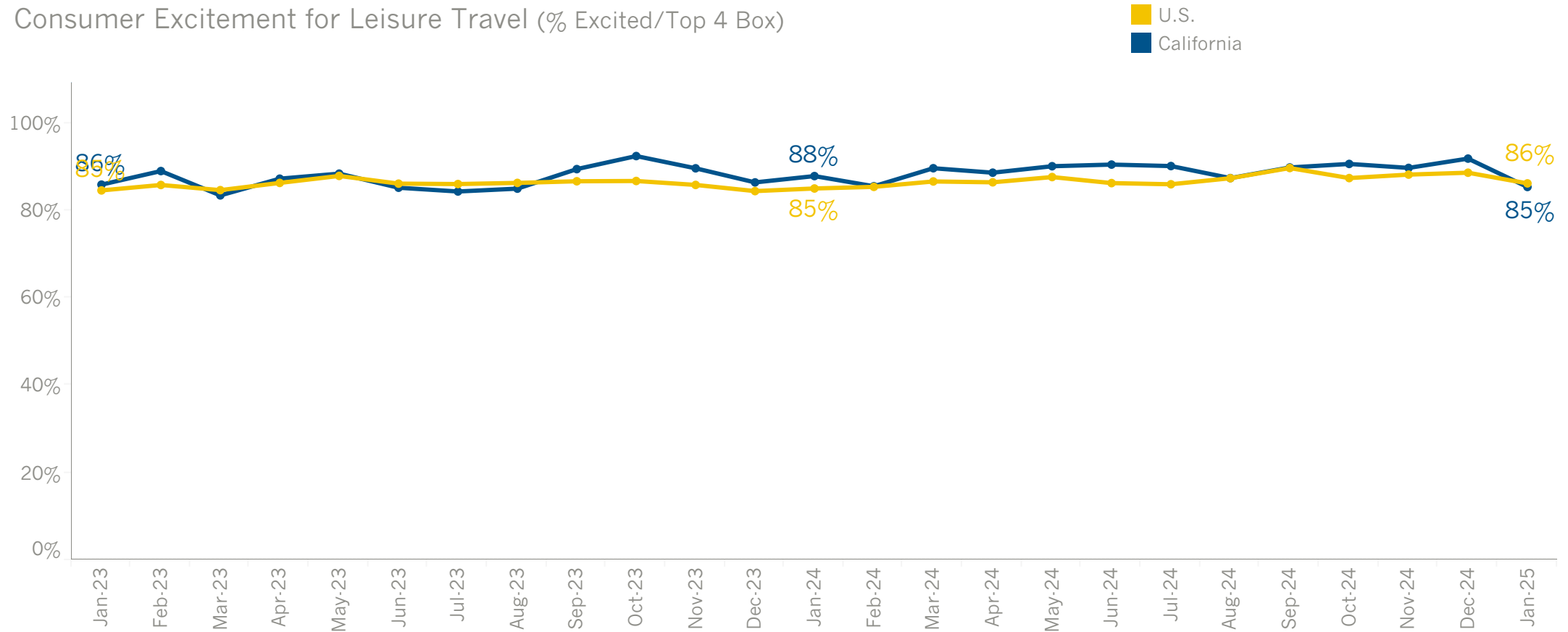
Q: Thinking carefully about how you expect to spend your income in the next three months, please use the scale below to describe your spending priorities. Leisure travel will be a(n)...
Data reported for: January 2025

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: January 2025

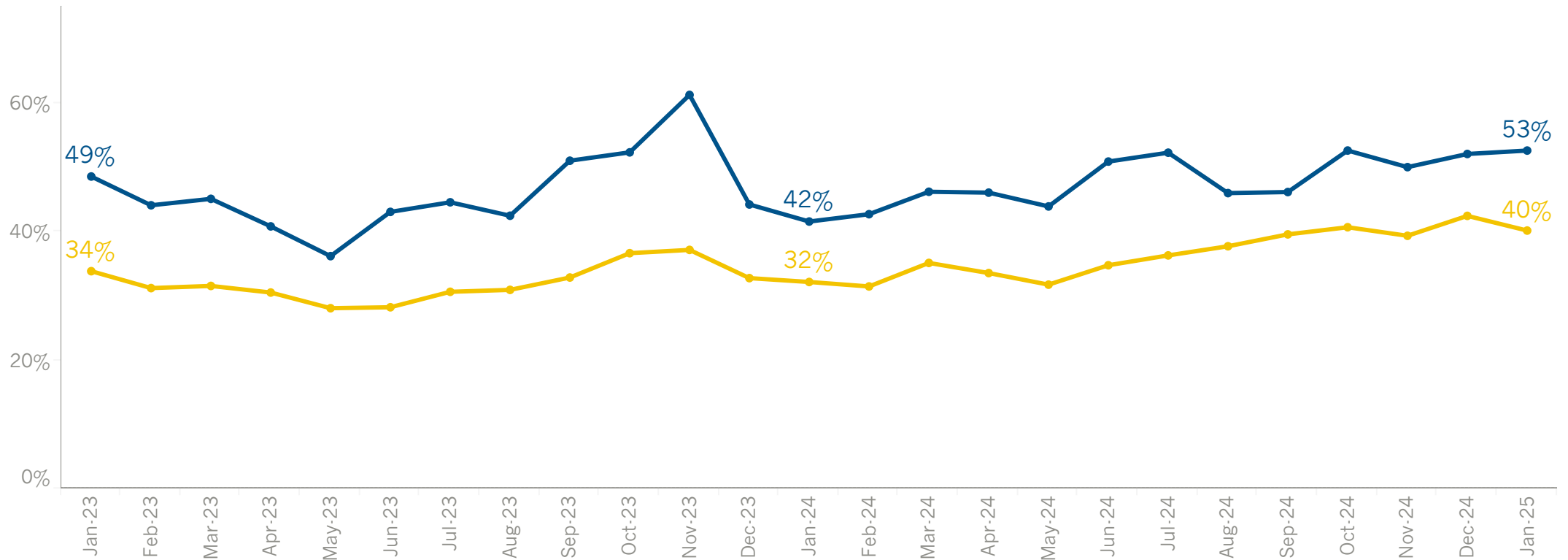
Source: Future Partners, *The State of the American Traveler*

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: January 2025

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

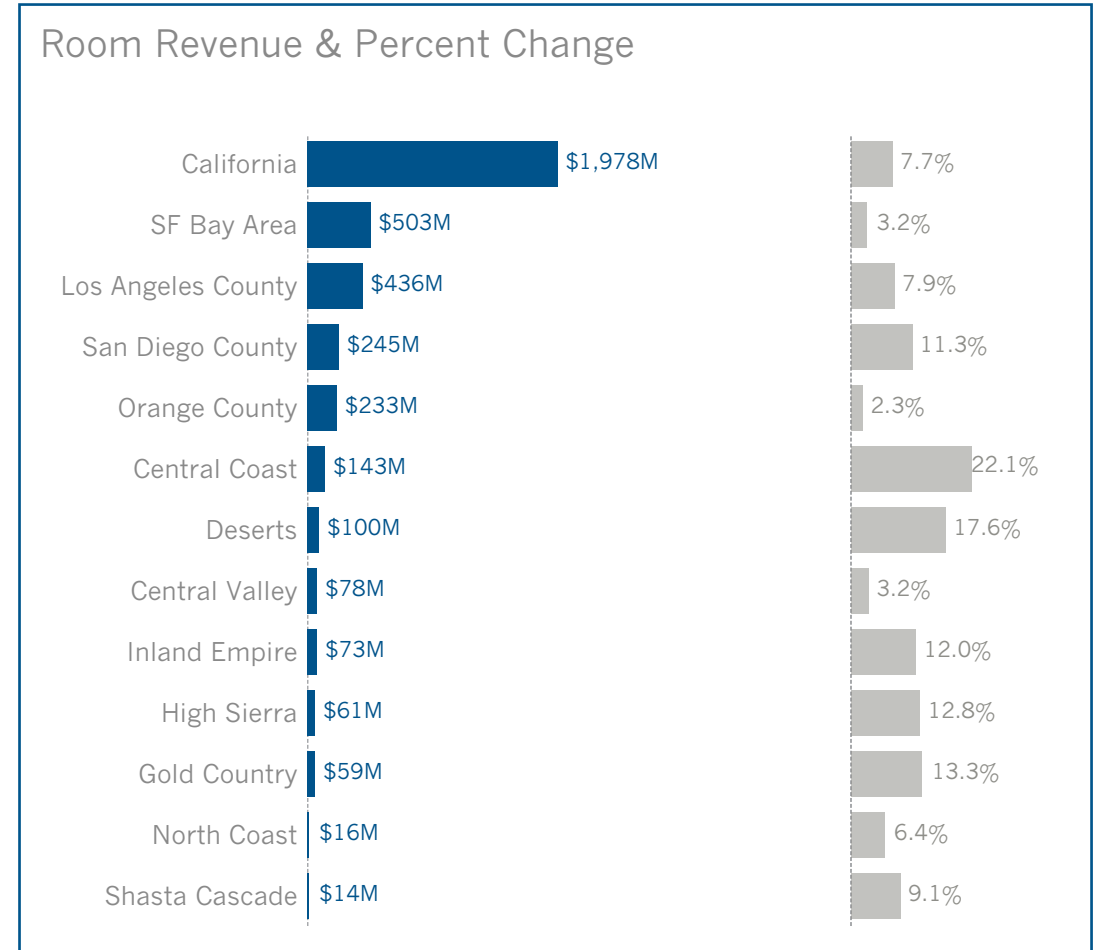
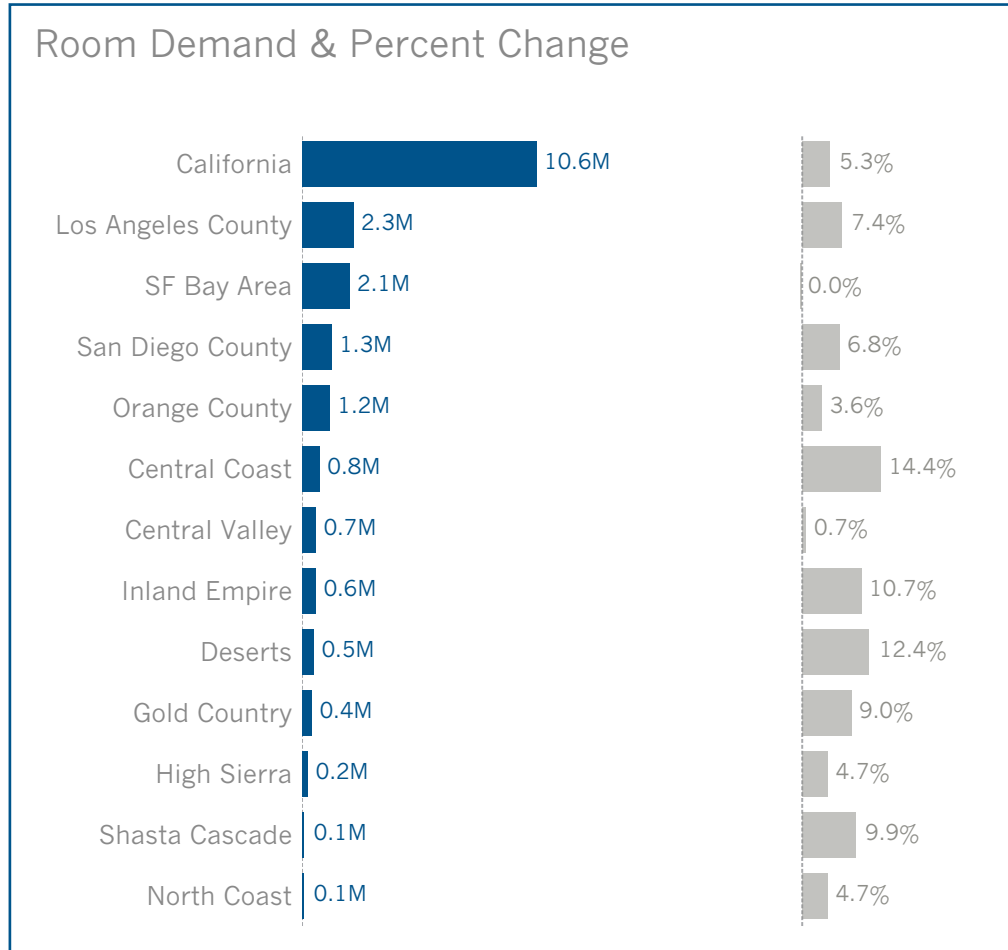


Domestic Indicators: **Lodging**

- Monthly Hotel Metrics
- Weekly Hotel Metrics
- Group Occupancy
- Short Term Rental Metrics

California Room Demand & Revenue

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

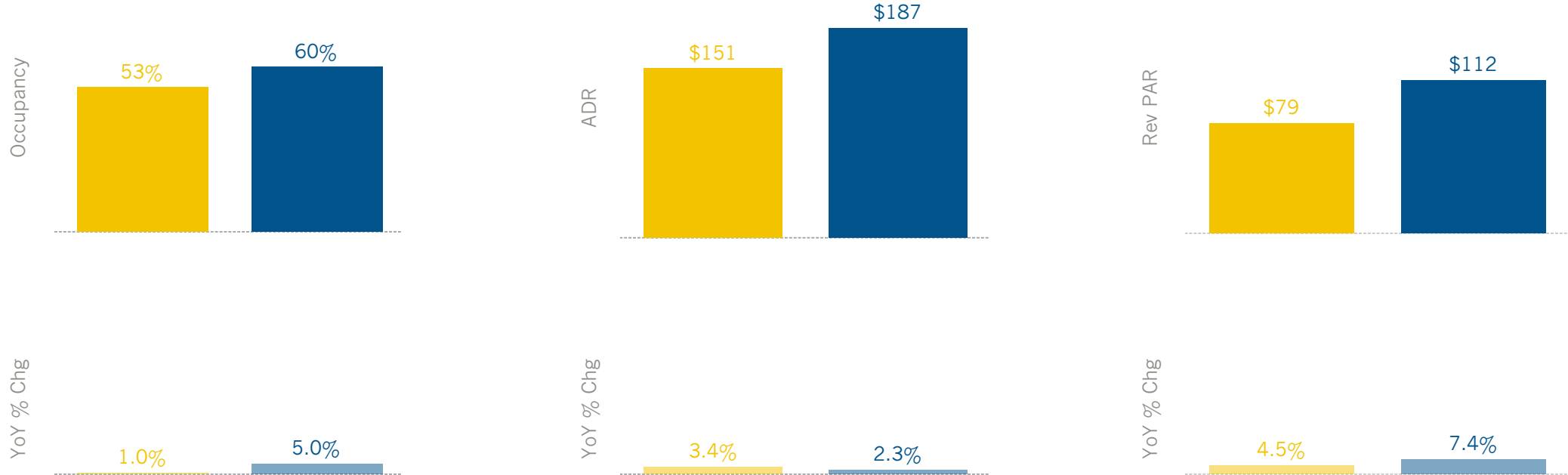


U.S. & California Hotel Metrics

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 (January 2025)

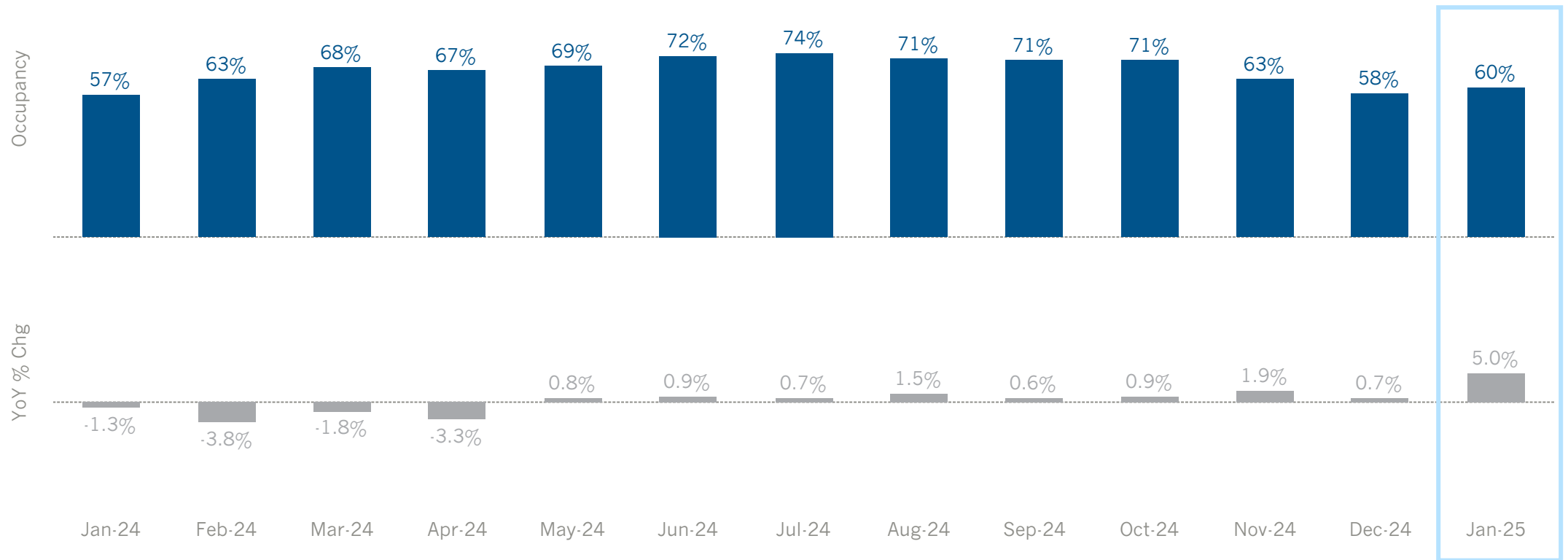
■ U.S. ■ California



California Hotel Occupancy

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

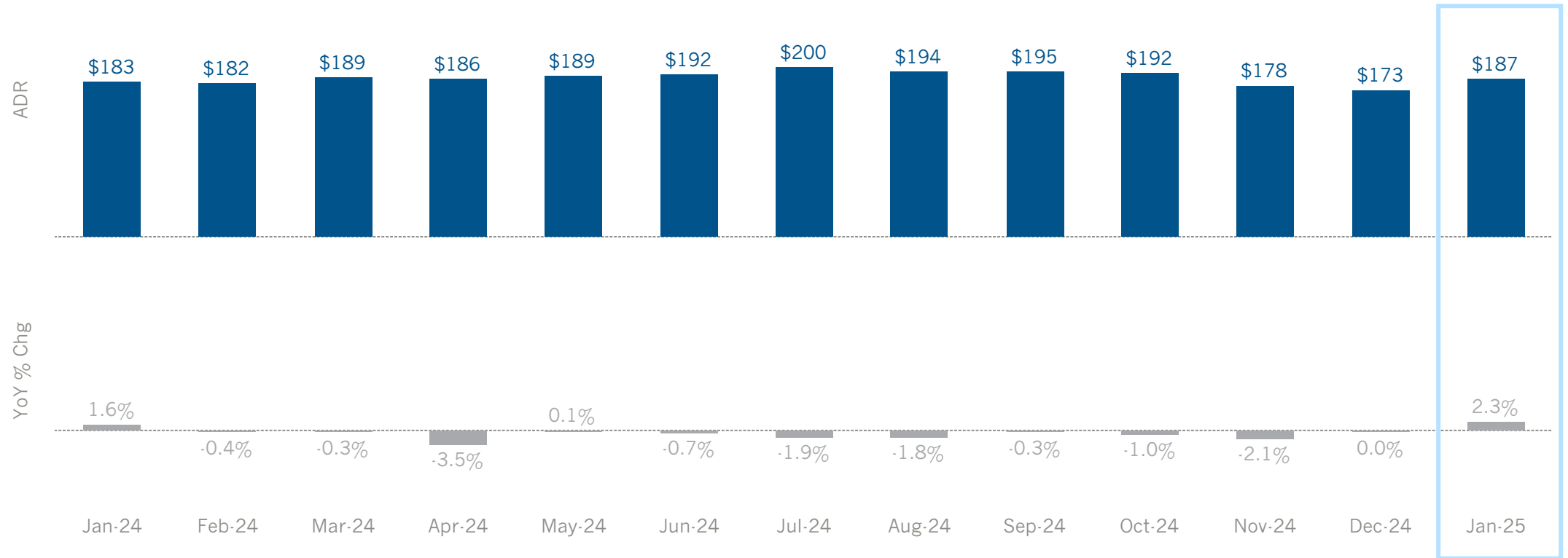
California Hotel Occupancy



California Hotel ADR

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

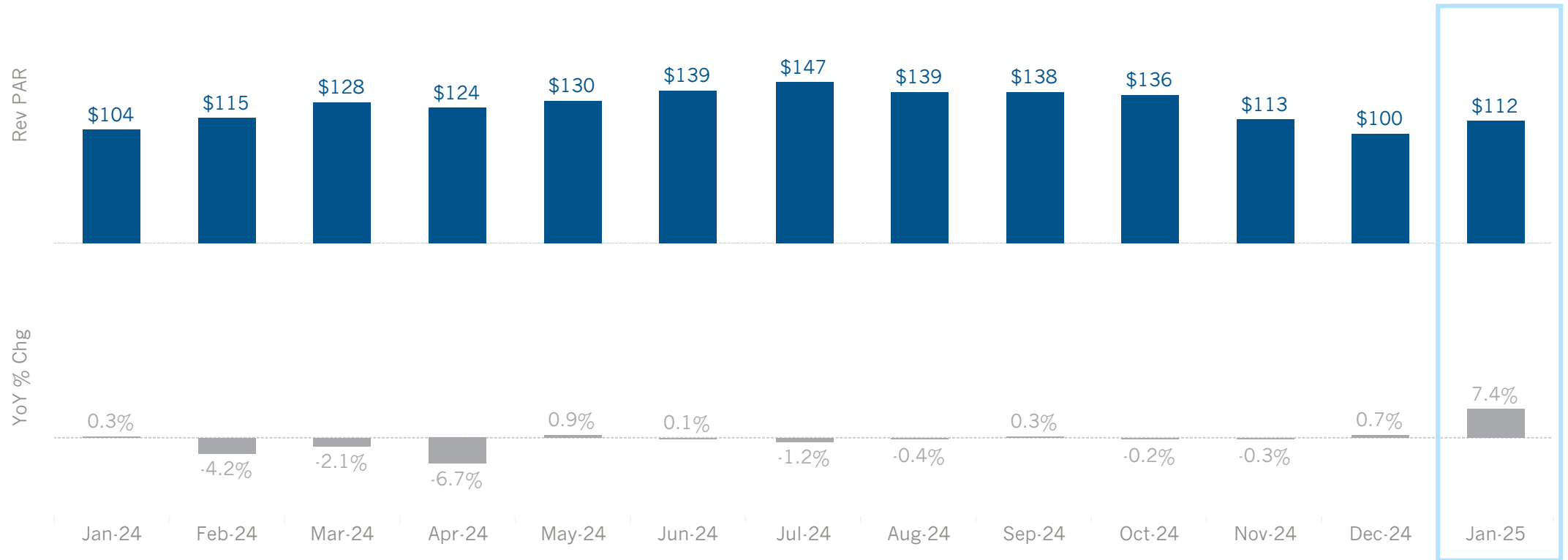
California Hotel ADR



California Hotel RevPAR

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

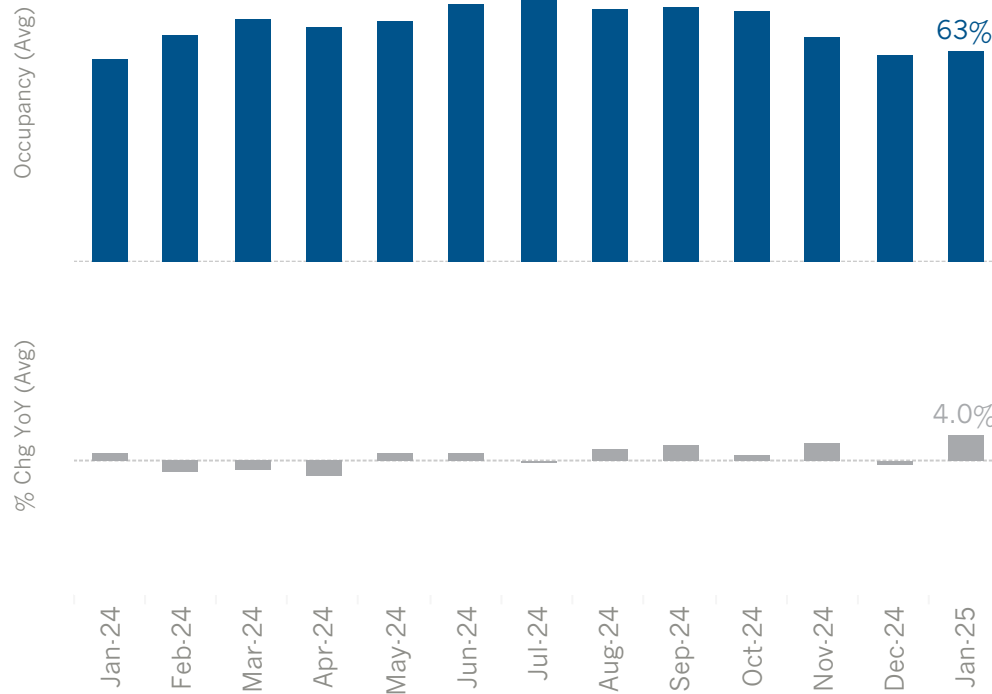
California Hotel RevPAR



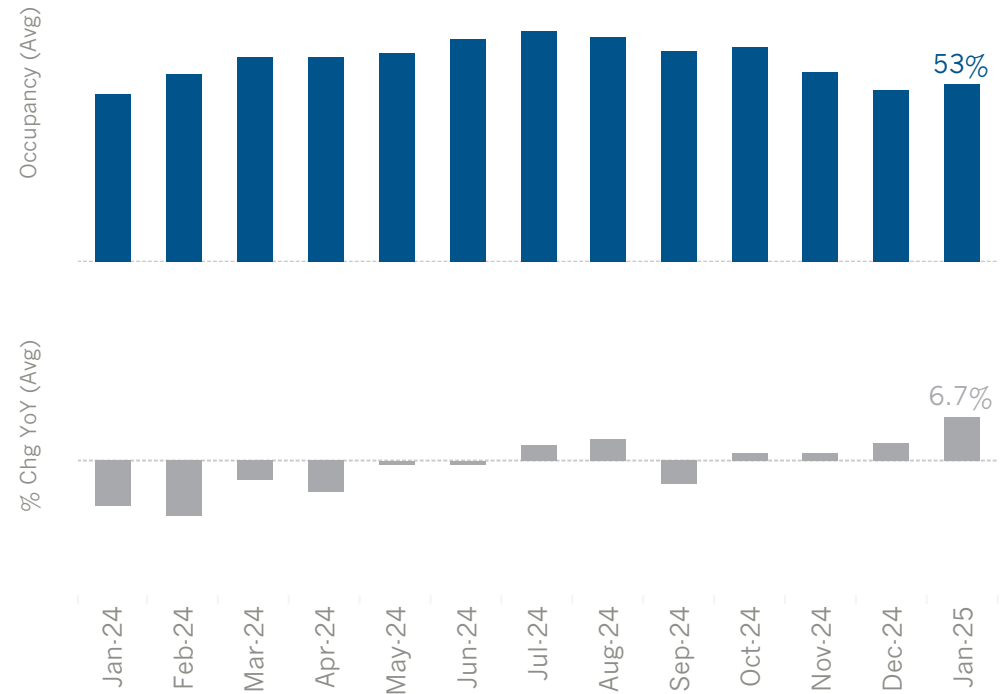
Gateway & Other Regions Hotel Occupancy

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

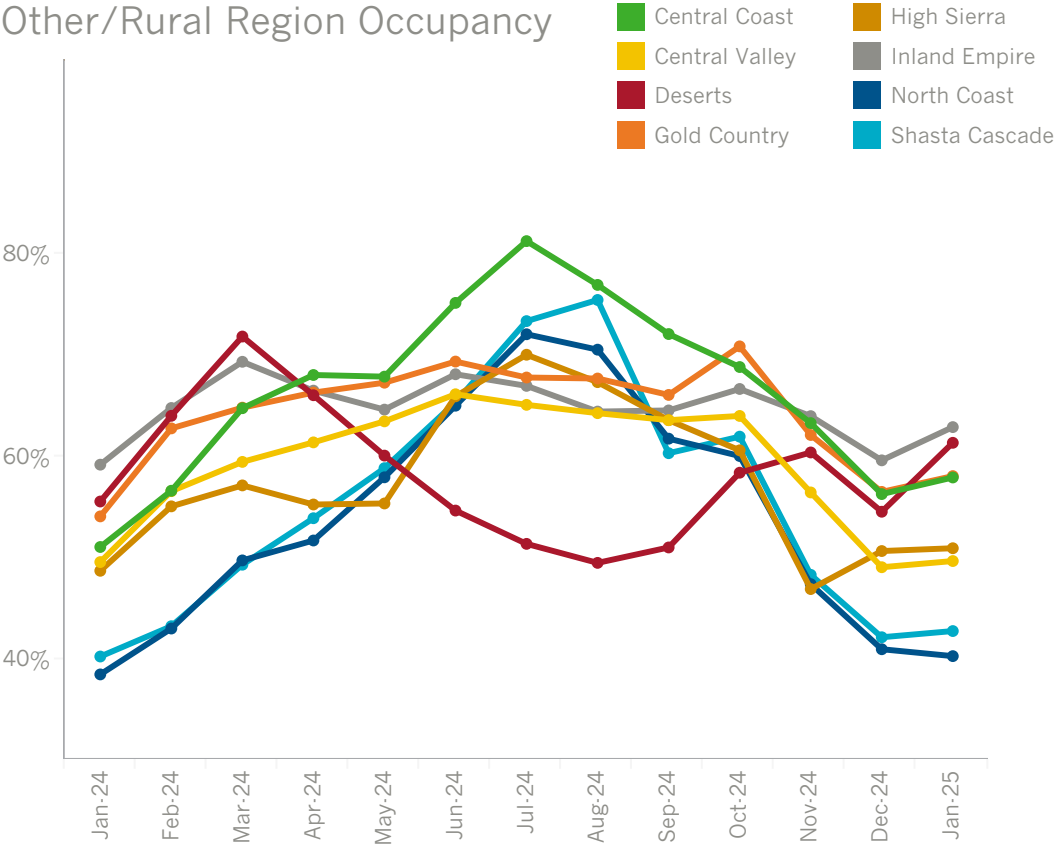
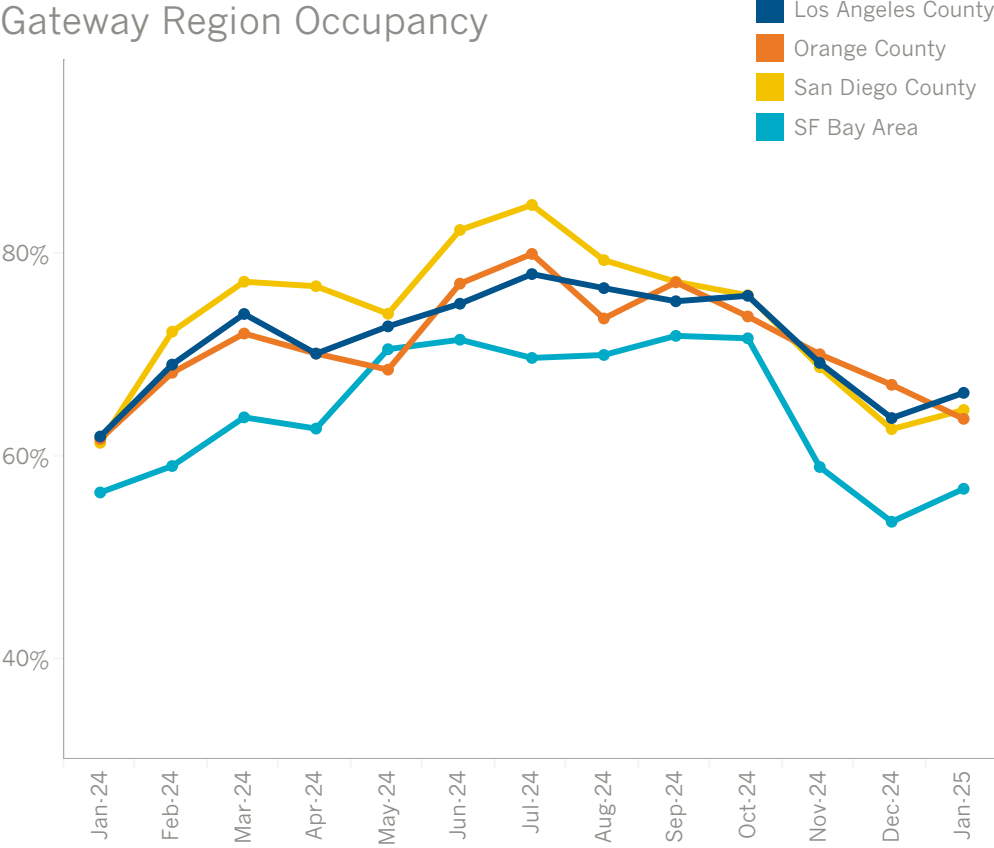
Other/Rural Regions include: Central Coast, Central Valley, Deserts, Gold Country, High Sierra, Inland Empire, North Coast, & Shasta Cascade

Data reported through: January 2025

Source: STR, LLC

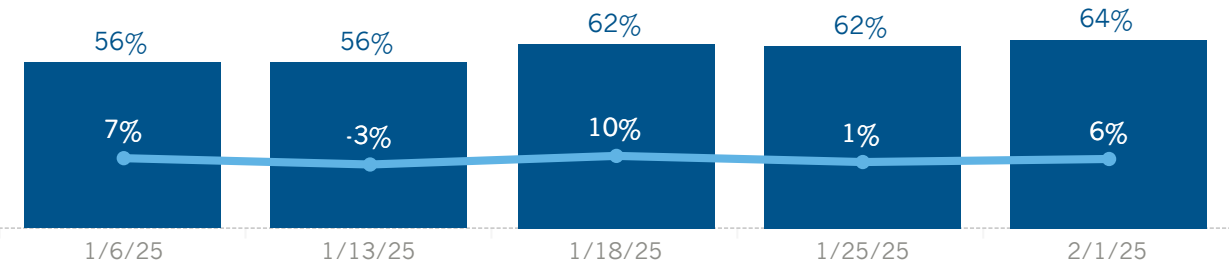
Regions Hotel Occupancy

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

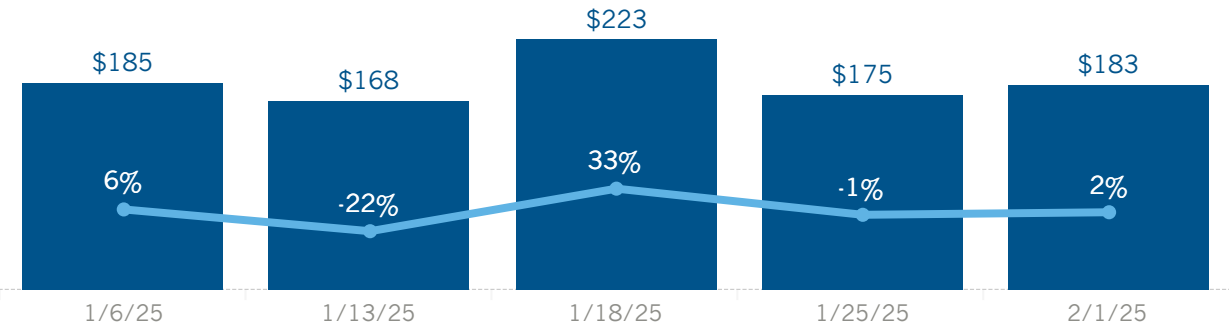


California Hotel Metrics (Weekly)

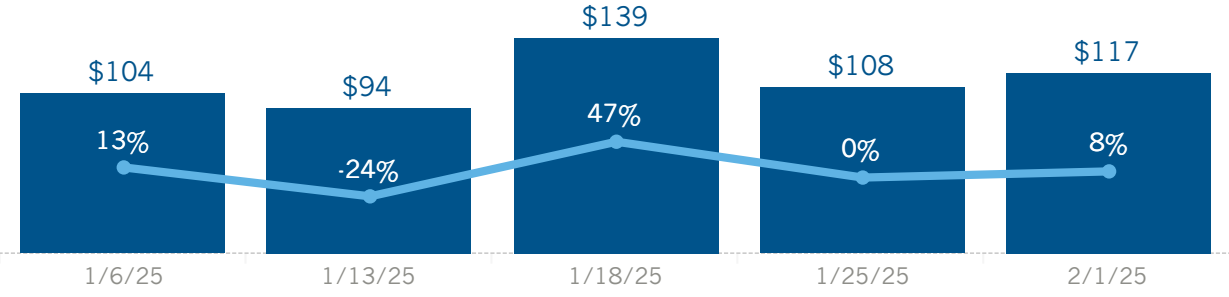
Occupancy



ADR



RevPAR



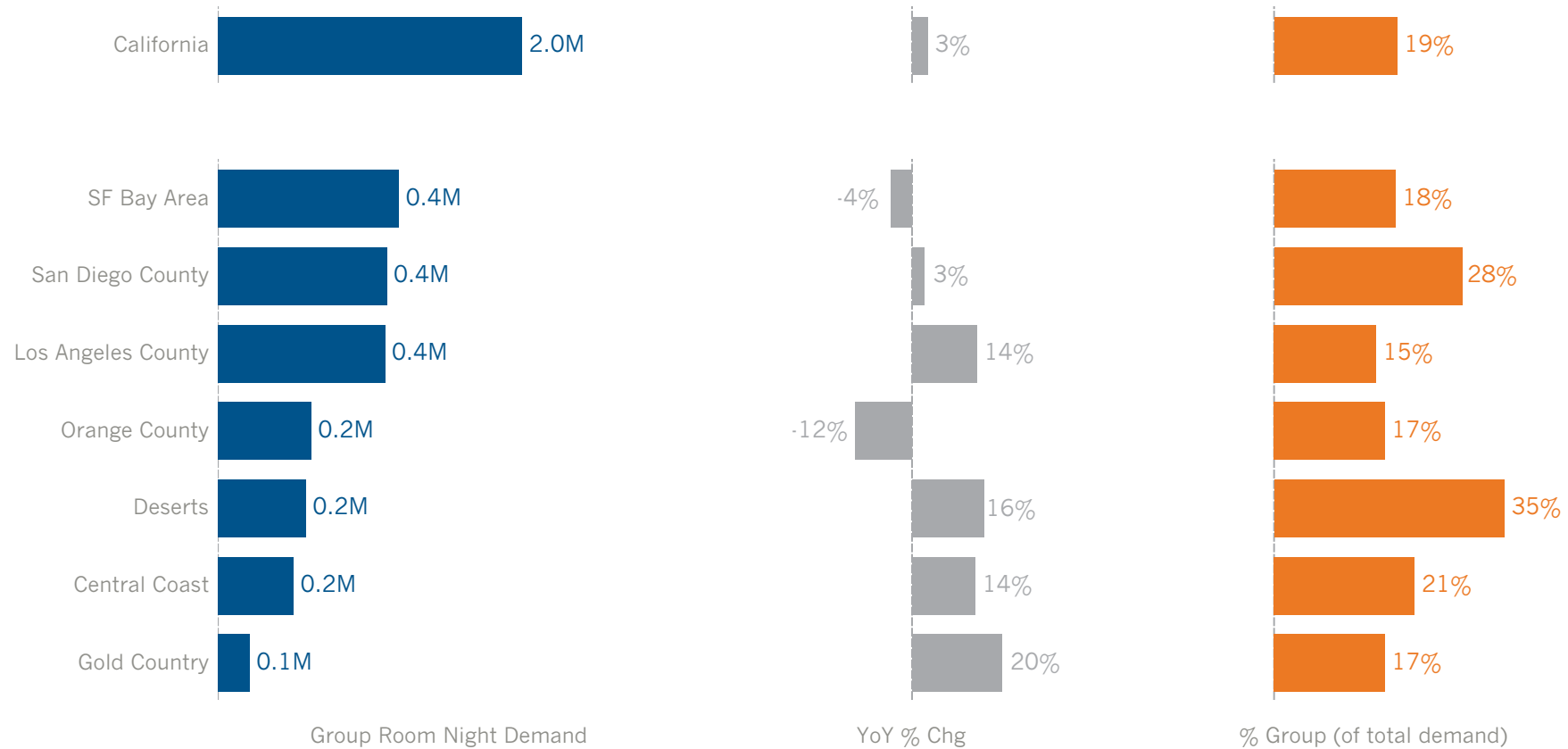
California Hotel Metrics (Weekly)

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.

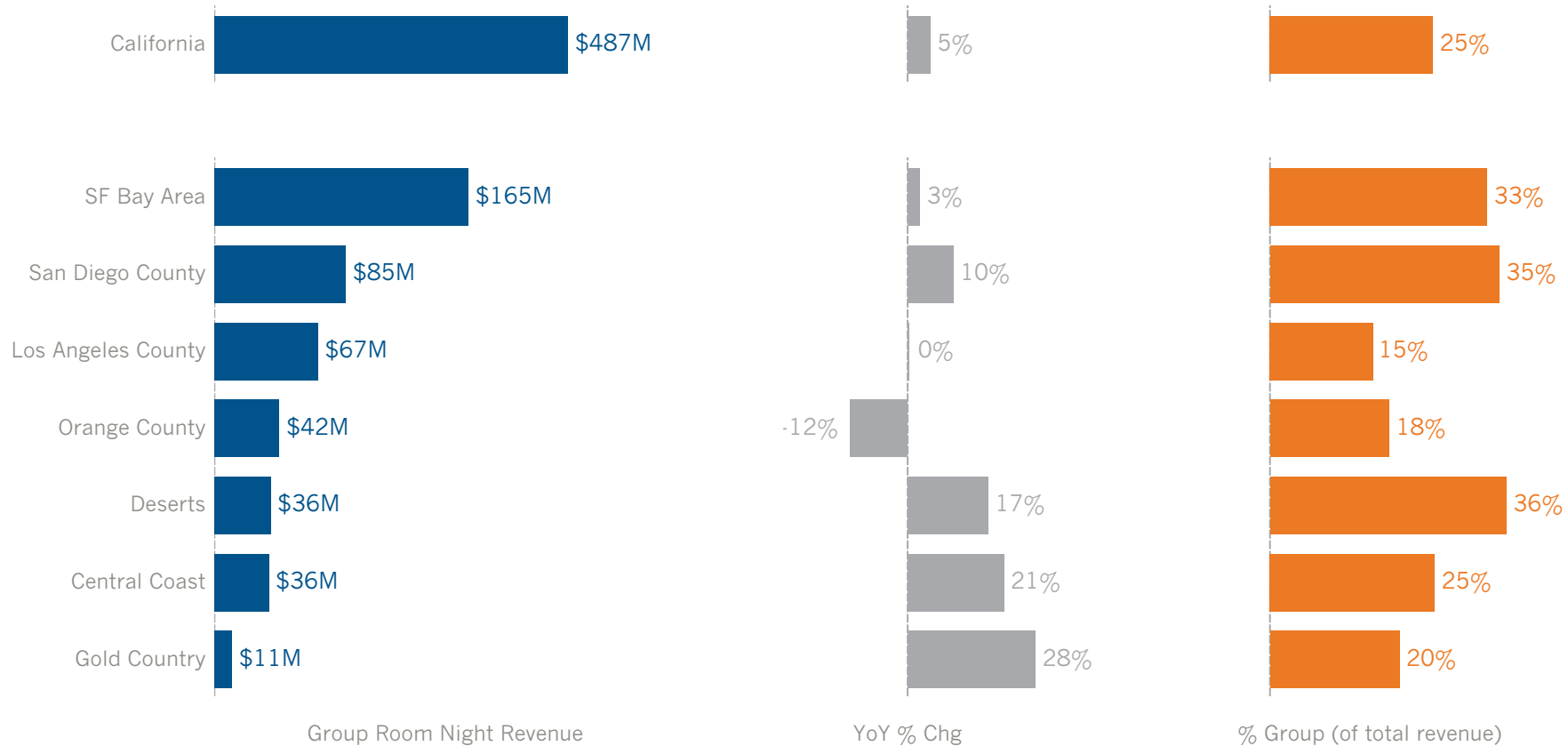
California & Regions Hotel Group Room Night Demand



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

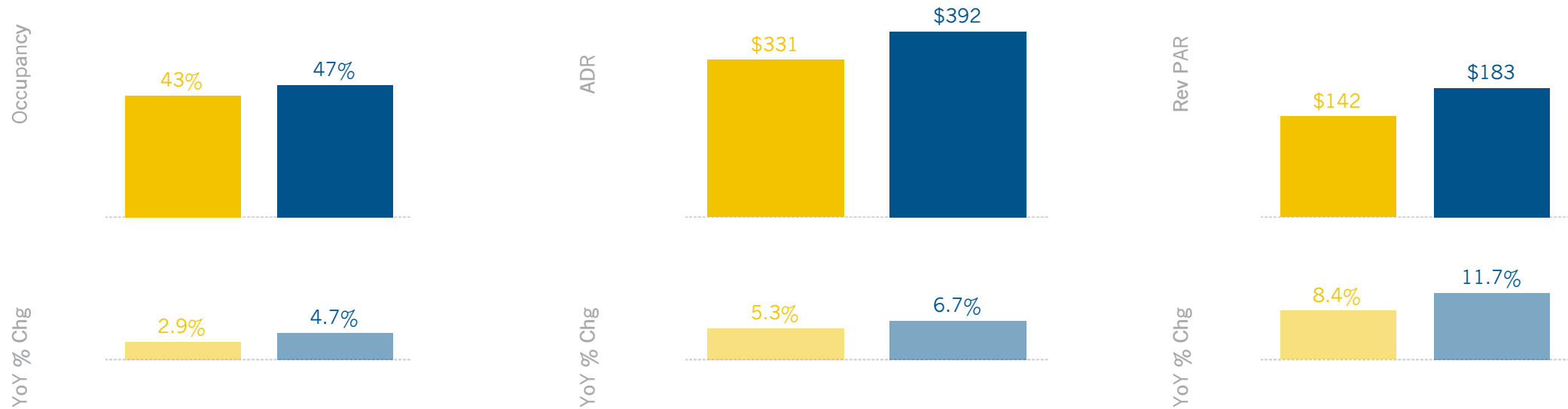


California Short-Term Rental Metrics

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

U.S. & California Short-Term Rental Metrics (January 2025)

U.S. California





Domestic Indicators:

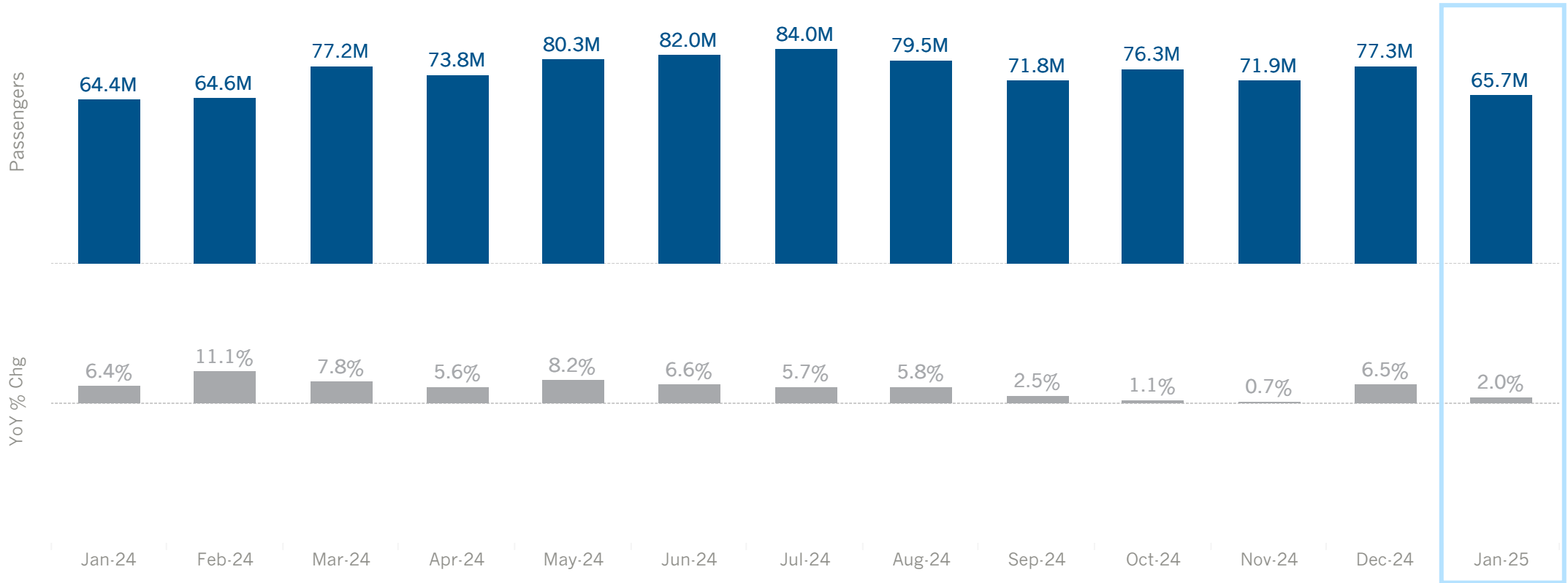
Airlift

- 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 CA airports and percent change.

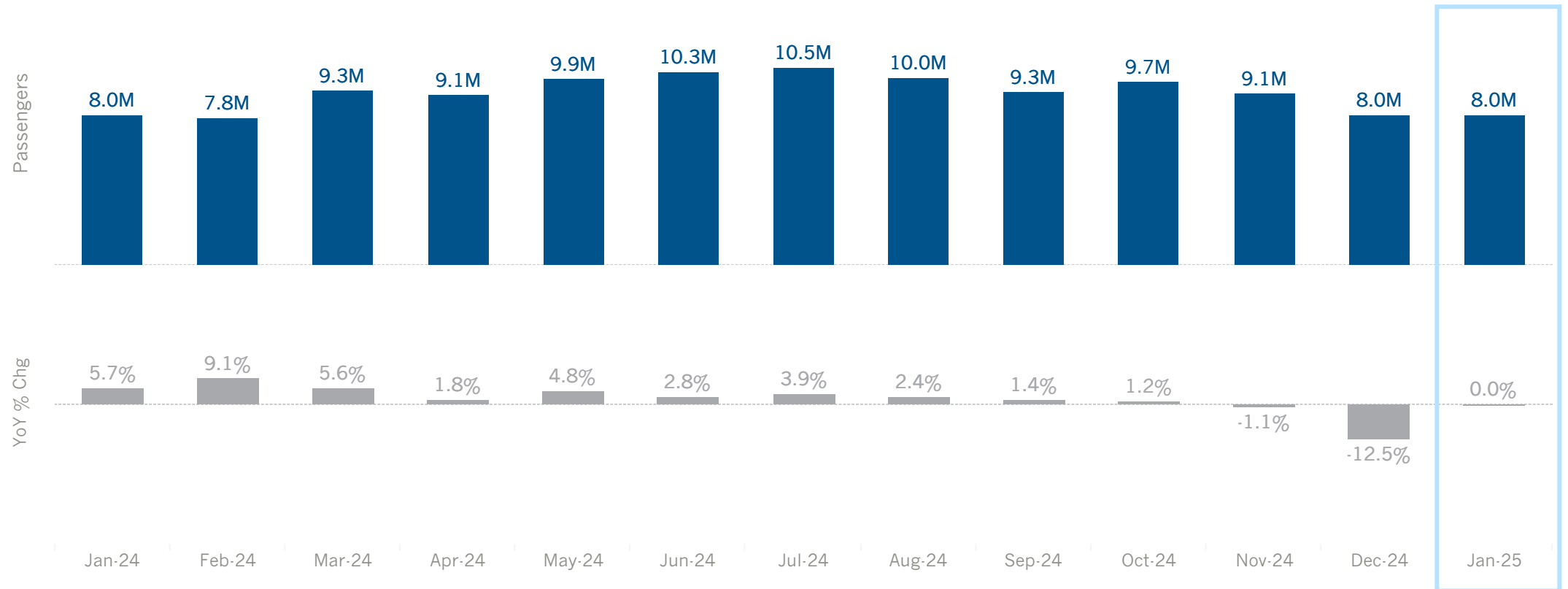
U.S. Air Passenger Throughput



CA Air Passenger Throughput

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

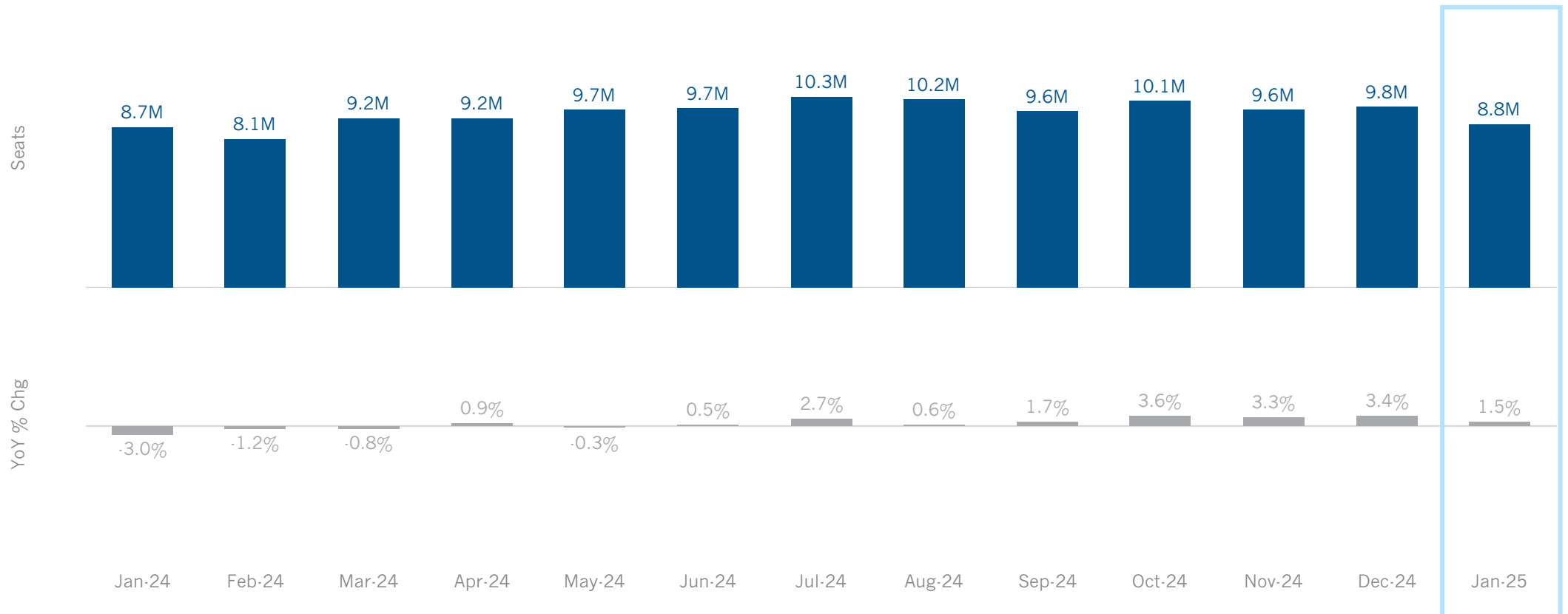
CA Air Passenger Throughput



California Domestic Non-Stop Seats

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

California Domestic Non-Stop Seats (January 2025)



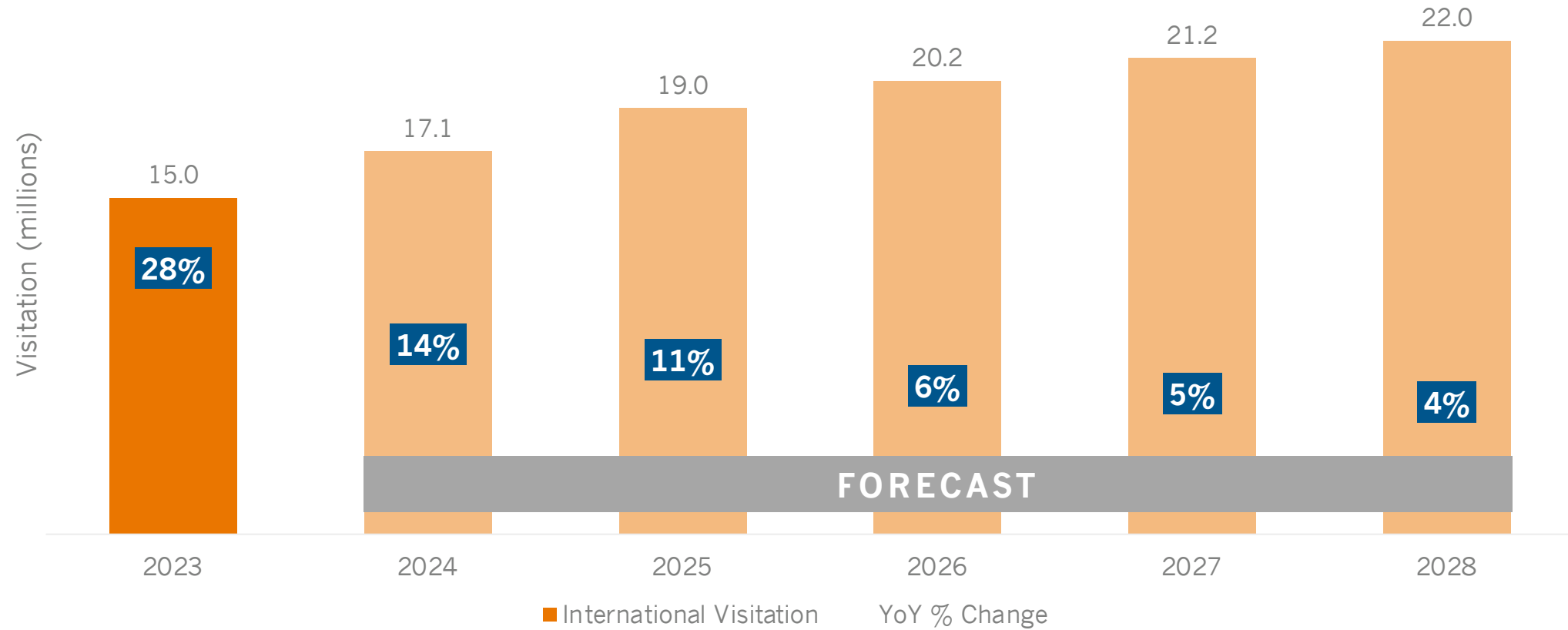


International Indicators: Forecast

- International Market Forecast

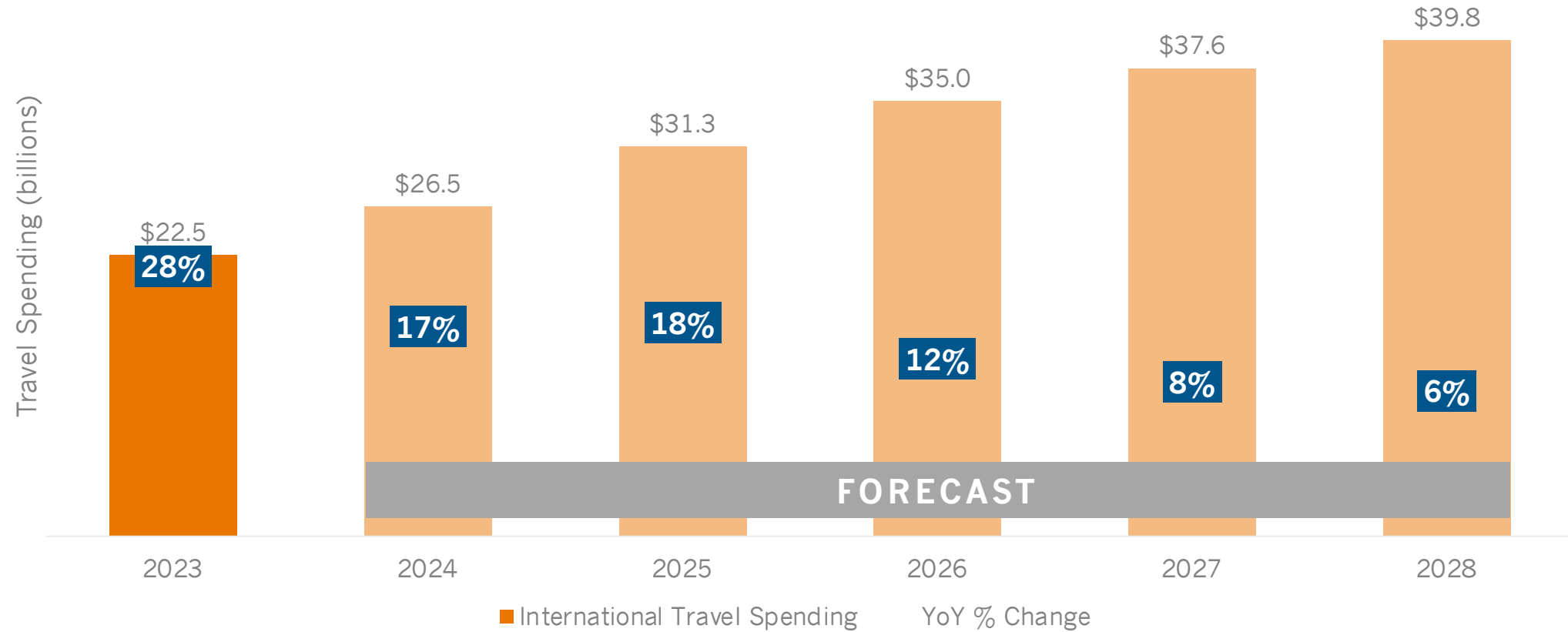
California Int'l Visitation Forecast

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



California Int'l Spending Forecast

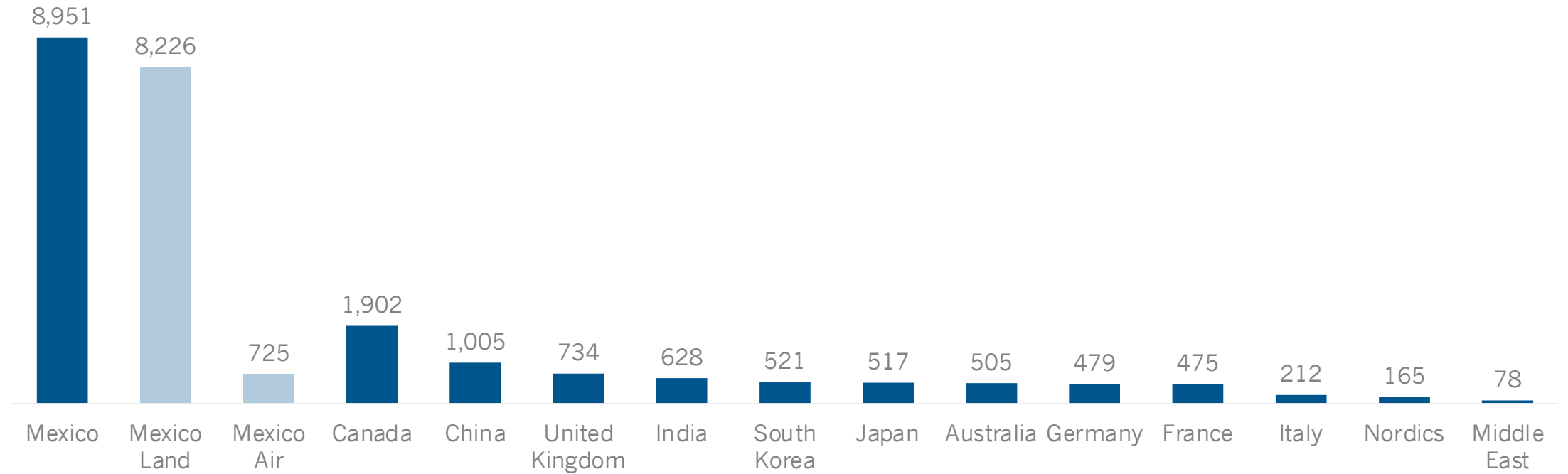
The chart below shows the current travel international spending forecast and annual growth rate.



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

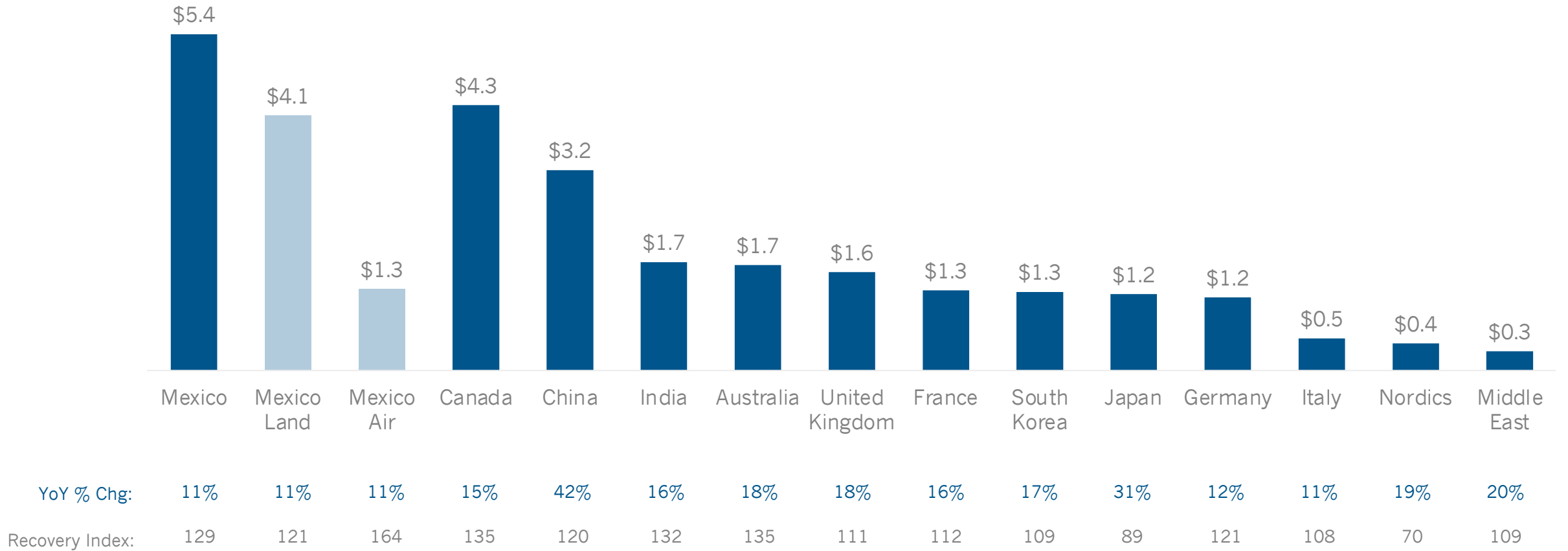


YoY % Chg:	9%	9%	9%	7%	34%	13%	8%	13%	28%	13%	8%	11%	8%	14%	15%
Recovery Index:	117	115	135	110	97	97	150	107	92	85	107	104	104	68	84

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





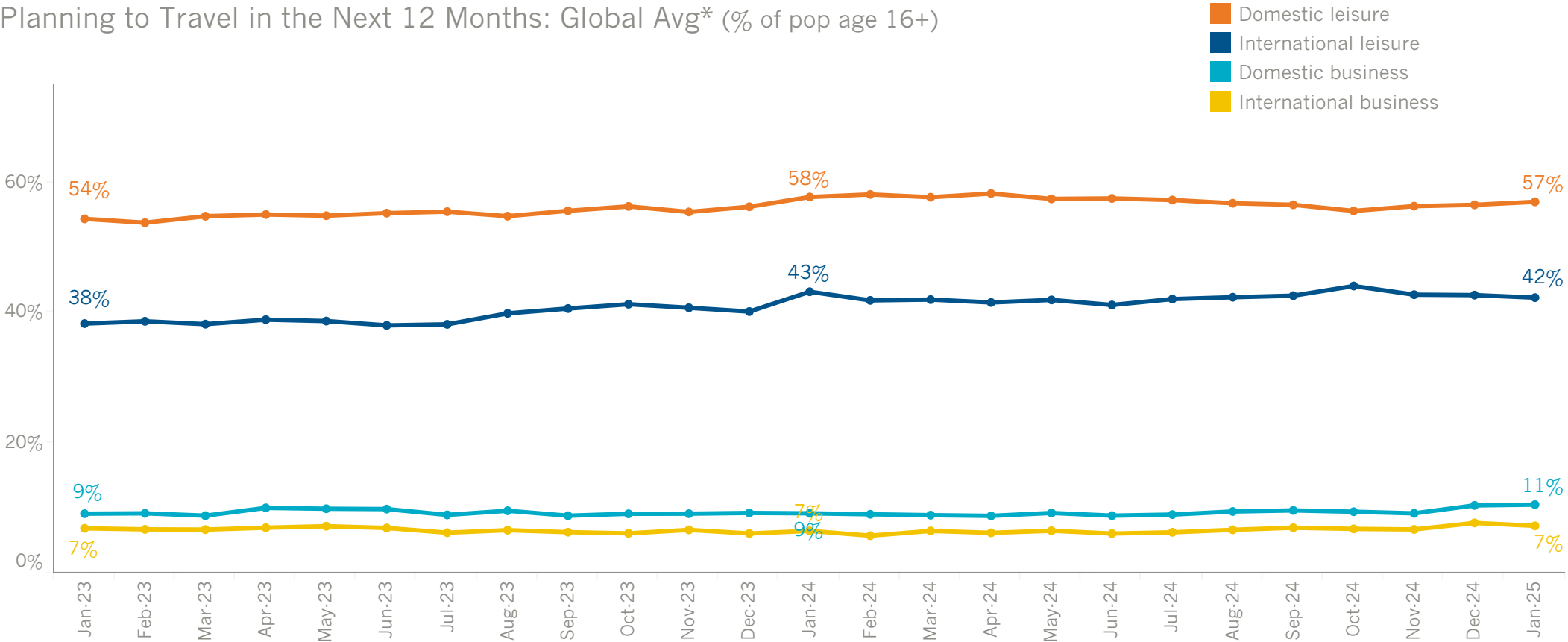
International Indicators: Consumer Sentiment

- Travel Planned
- Barriers to Travel

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: January 2025

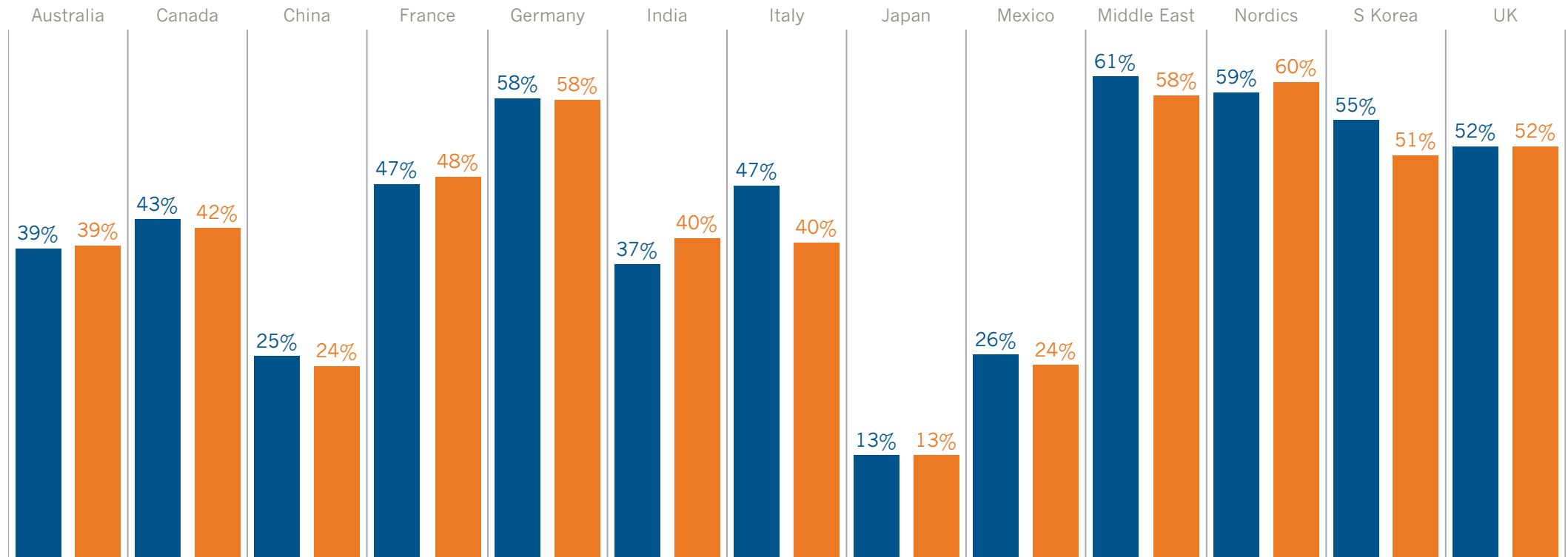
Source: YouGov

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+)

■ Jan-24 ■ Jan-25



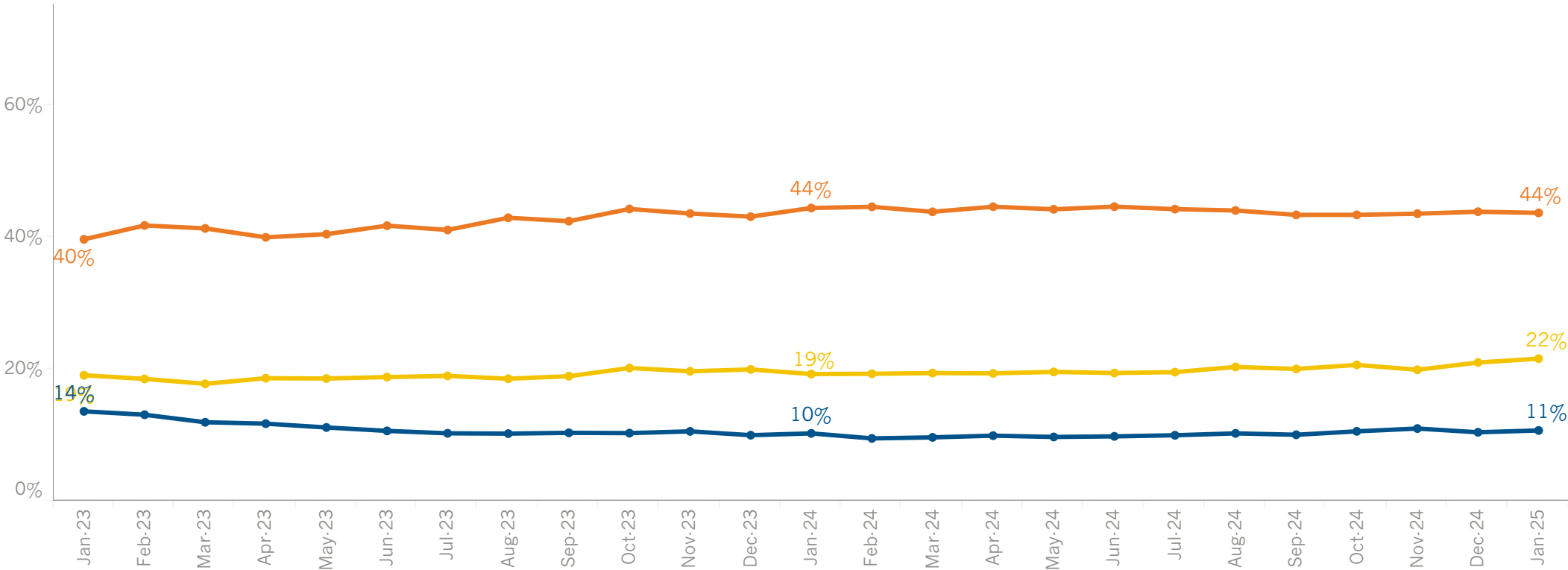
Q: Which, if any, of the following trips are you planning to take in the next 12 months?
Data reported for: January 2025

International Markets Barriers to Travel

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

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

- Price of travel
- Safety
- Travel restrictions



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

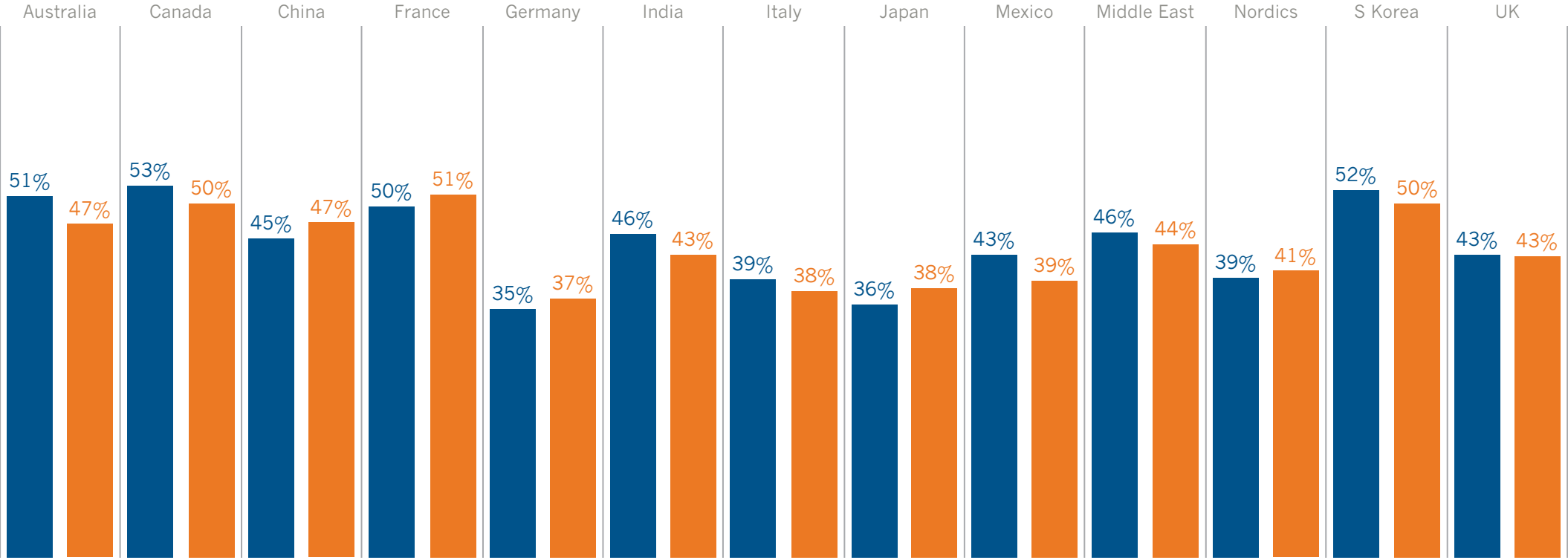
Data reported for: January 2025

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) ■ Jan-24 ■ Jan-25



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

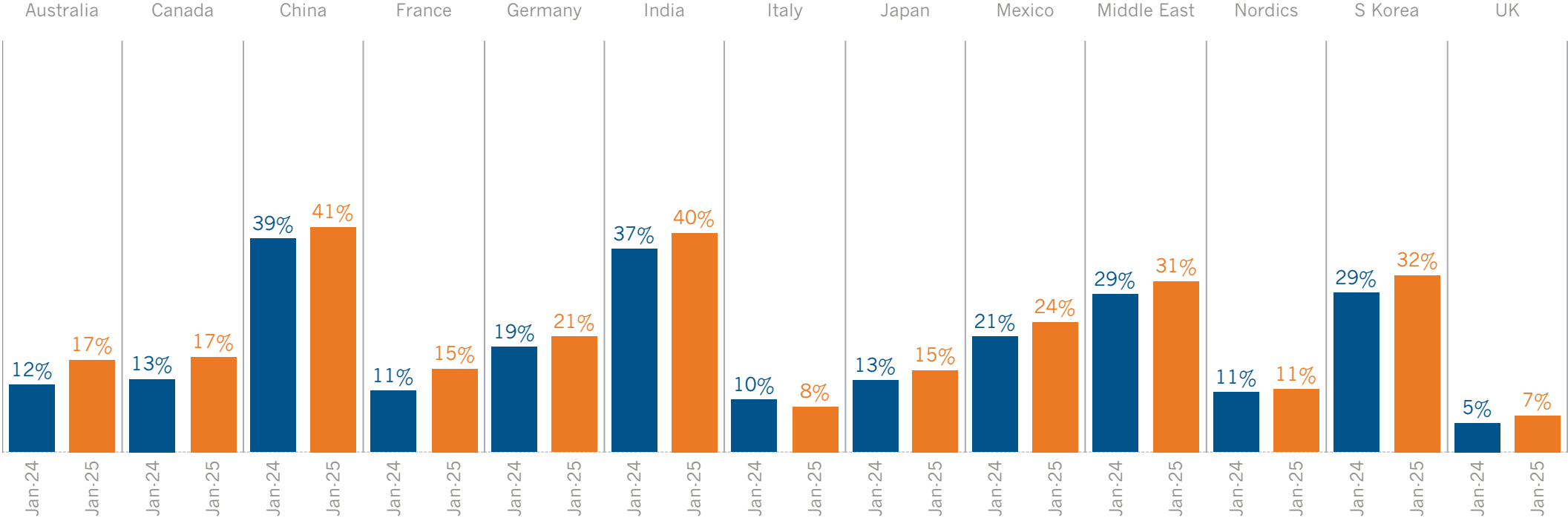
Data reported for: January 2025

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?

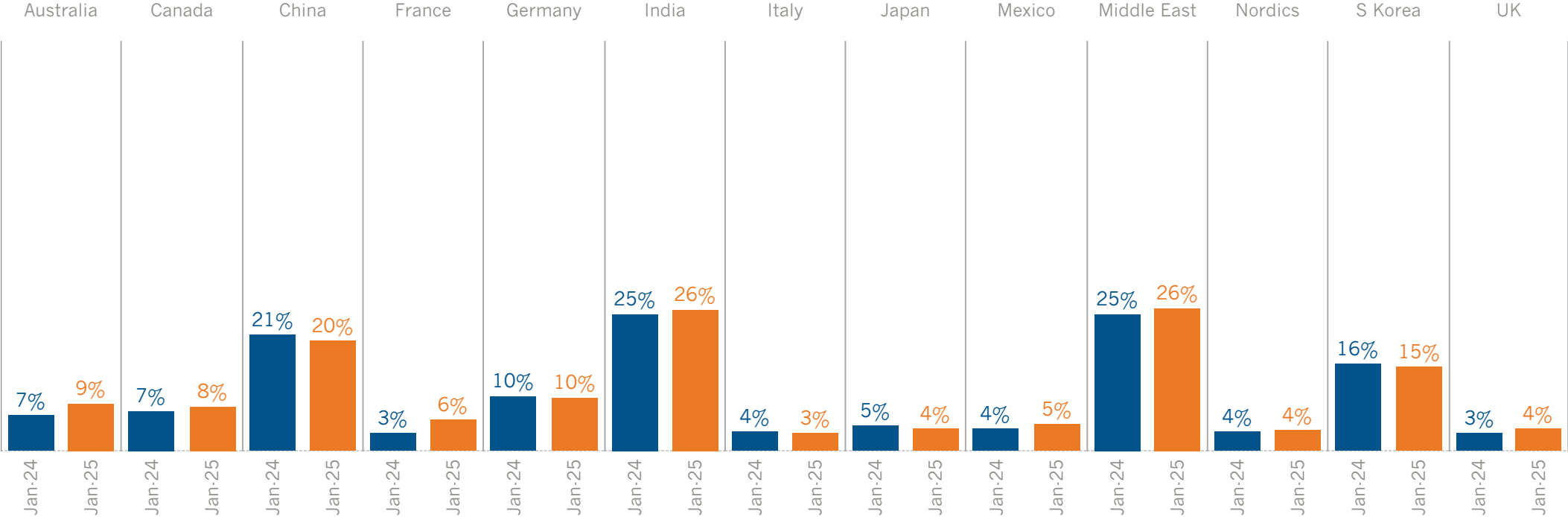
Data reported for: January 2025

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: January 2025

Source: YouGov



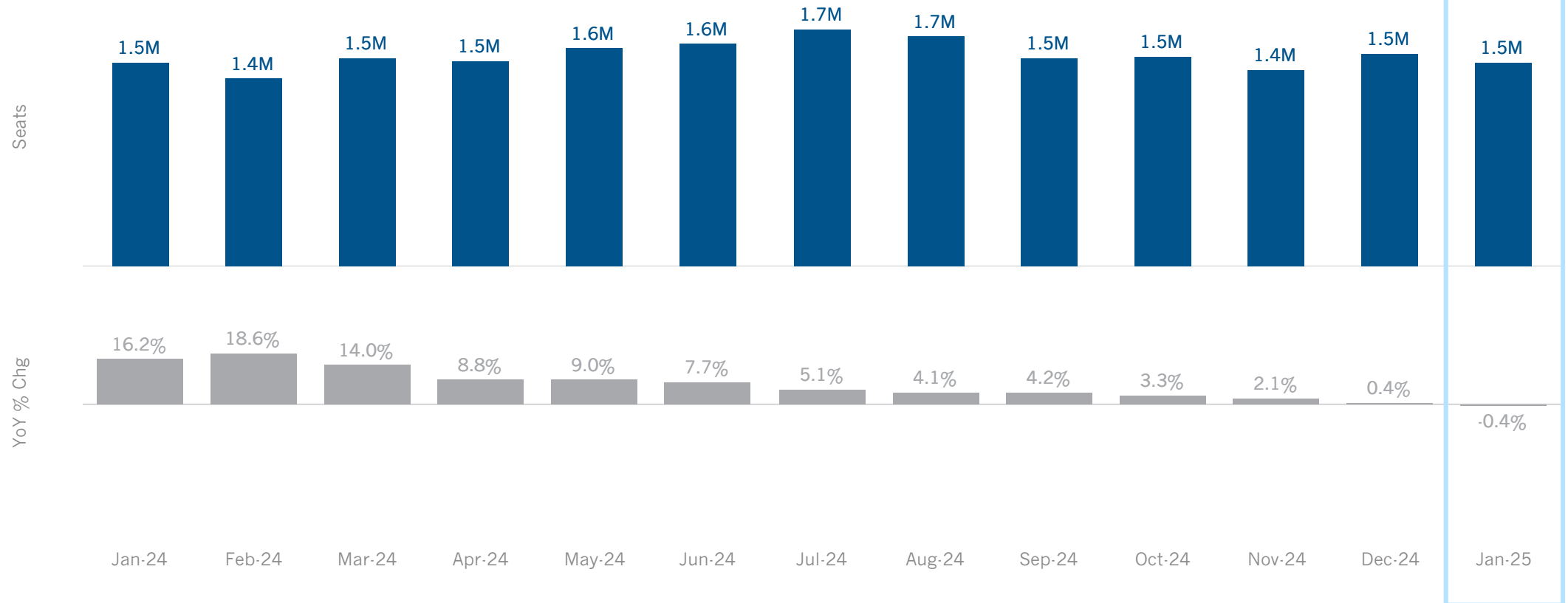
International Indicators: Airlift & Arrivals

- 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.

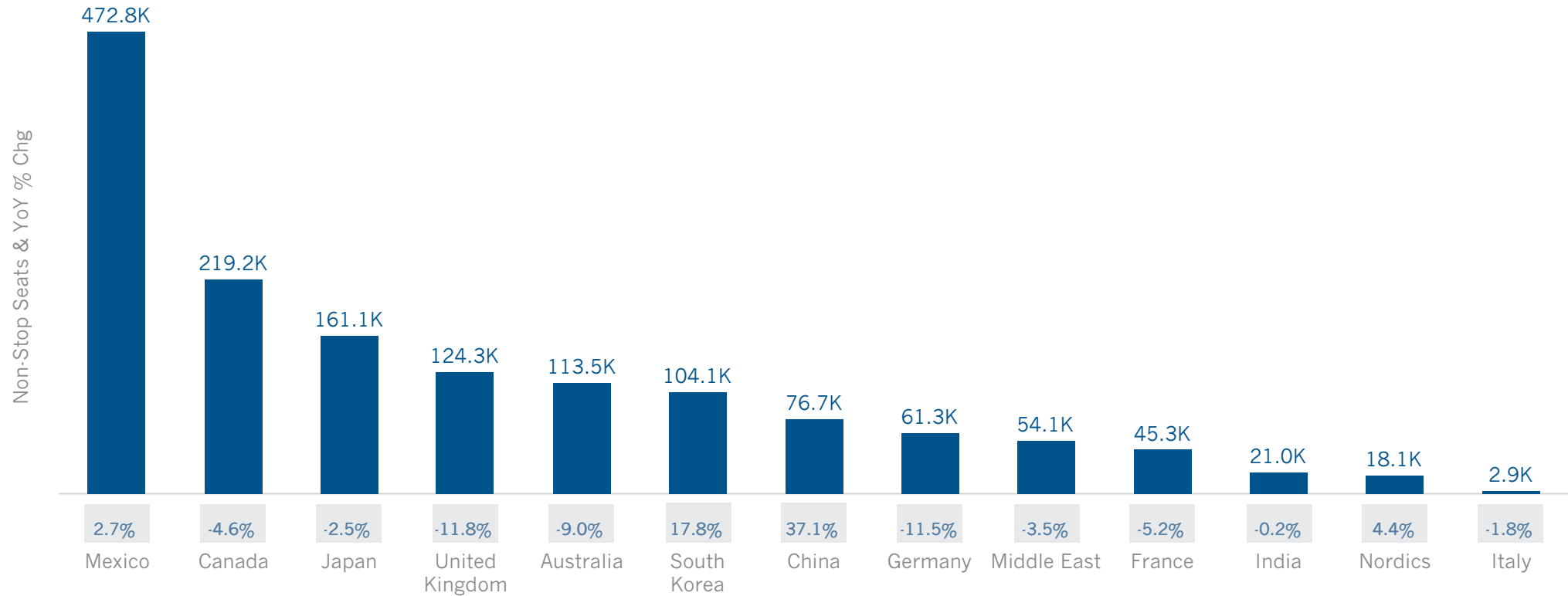
California International Non-Stop Seats (January 2025)



California Int'l Non-Stop Seats by Market

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

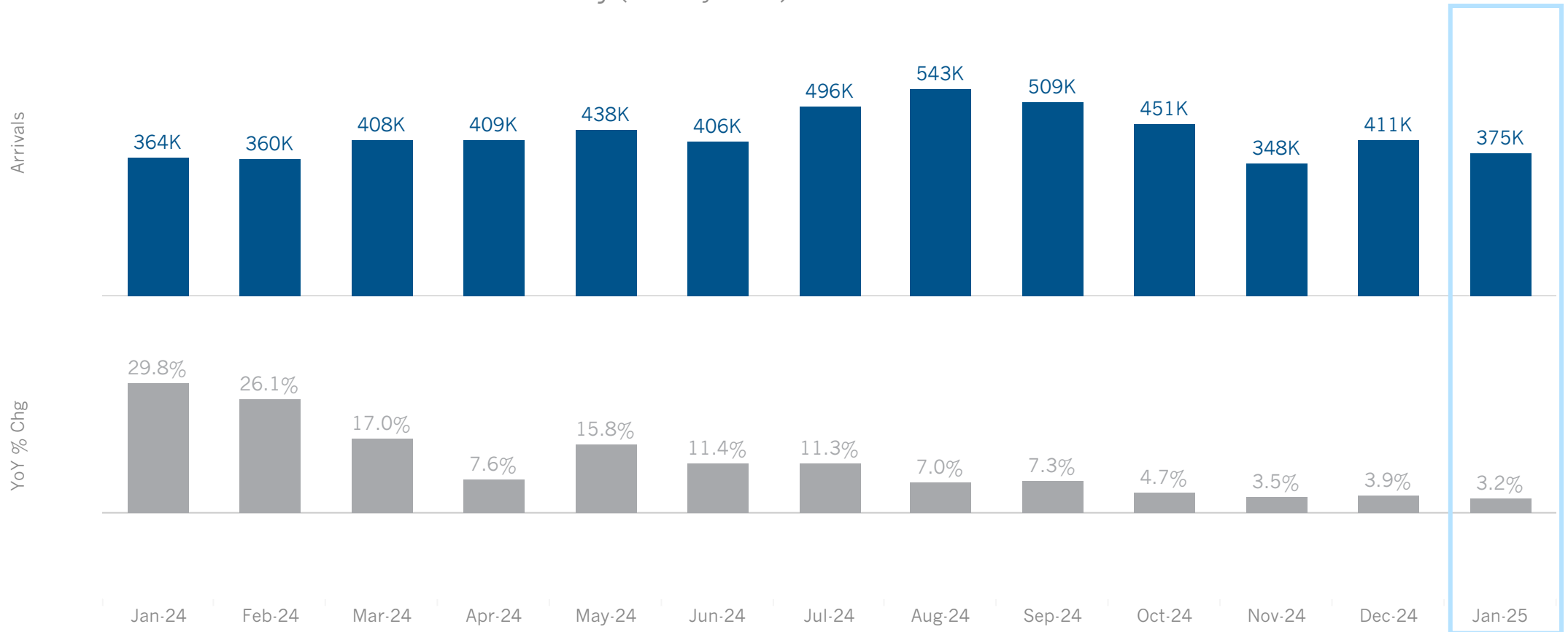
California International Non-Stop Seats (January 2025)



California Non-Resident Arrivals

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

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

