

WELCOME

16th Annual Tourism Summit

SANTA
MONICA
TRAVEL & TOURISM



MAIN CHARACTER ENERGY

#SMSUMMIT25

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Wi-Fi & Password: SMSummit25

WELCOME



Mayor Lana Negrete

City of Santa Monica



City of
**Santa
Monica**

CITY COUNCIL



LEADERS IN HOSPITALITY



IT'S A VIBE

SEND A KINDNESS MESSAGE



KEYNOTE



Caroline Beteta

President/CEO
Visit California





16th Annual Santa Monica Travel & Tourism Summit

Thursday, June 12, 2025



Caroline Beteta

President & CEO
Visit California





- Officially formed in 1996
- Nonprofit 501(c)6
- 16,500+ assessed businesses
- Mission: create desire for the California experience
- 37-member board of directors



Santa Monica board representation



Julius Robinson

Chief Operations Officer Full Service
MxM, Western, U.S.



Geri Gomes

Regional Vice President
of Operations West



John Sheperdson

Senior Vice President
Operations – West



Gary Thomas

Senior Vice President
of Operations



Terry Lewis

Area Vice President
of Operations



Shuaib Bulhan

Division Vice President
Western Operations



ACCOR

Peter Humig

Vice President of Operations
West Coast



Kevin Bass

General Manager & Vice President



Amar Tankha

Regional Vice President
of Operations



Ripton Melhado

Senior Vice President
Field Operations

Santa Monica Travel & Tourism representation



Misti Kerns

President & CEO, Santa Monica Travel & Tourism

- CEO Destination Council
- Marketing Advisory Committee
- Professional Meetings & Events task force
- Culinary task force
- Route 66 task force

USA

visit
California

SANTA
MONICA

INSPIRATION

PLANNING

TRANSACTION

ACCOMMODATIONS
ATTRACTIONS
RESTAURANTS & RETAIL
TRANSPORTATION
RENTAL CARS



State of tourism

Economic impact of travel in California

2024

Visitor Spending

\$157.3
Billion

+3% YOY

Tax Revenue

\$12.6
Billion

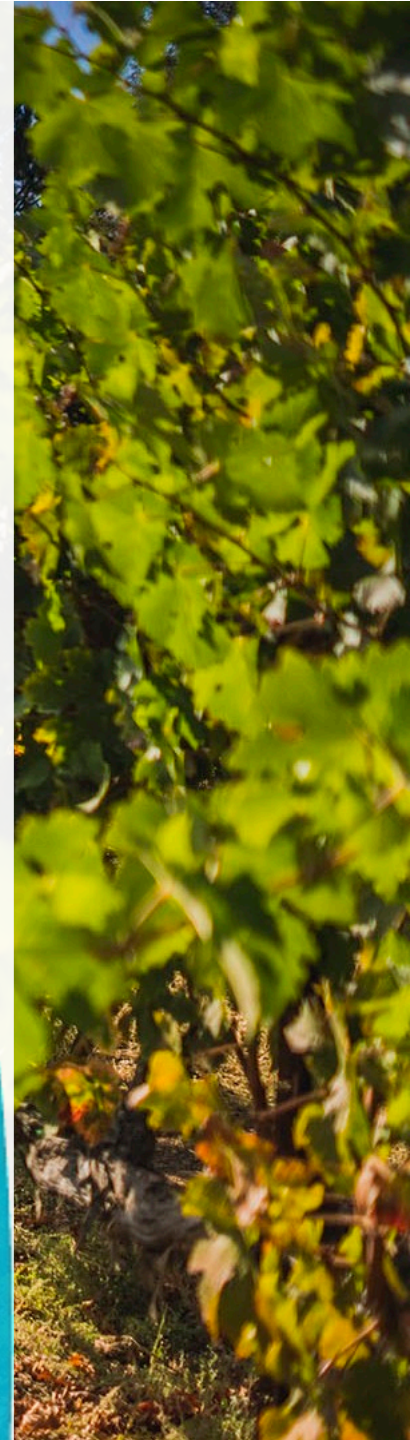
+3.1% YOY

Jobs

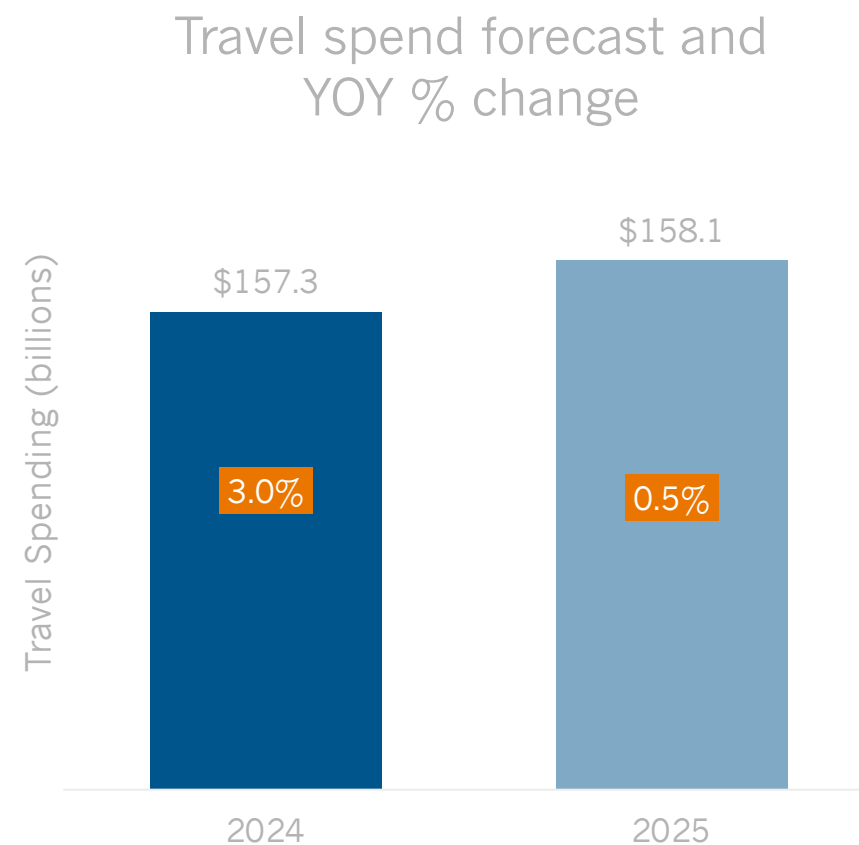
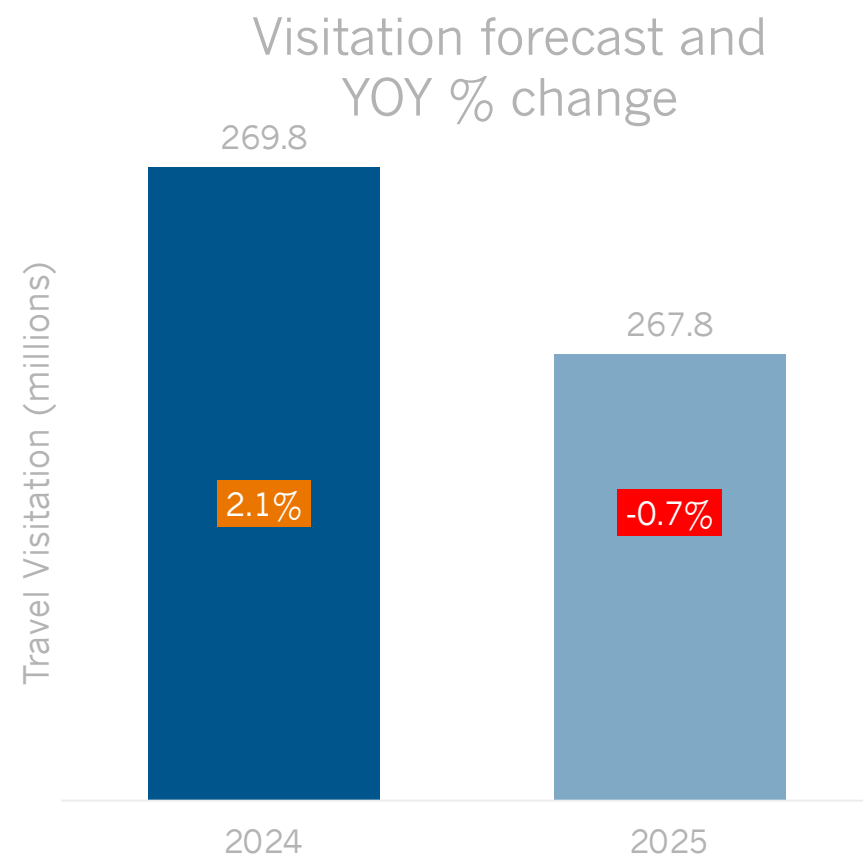
1.16
Million

+23,950 jobs

Source: Dean Runyan Associates



California 2025 forecast (total)



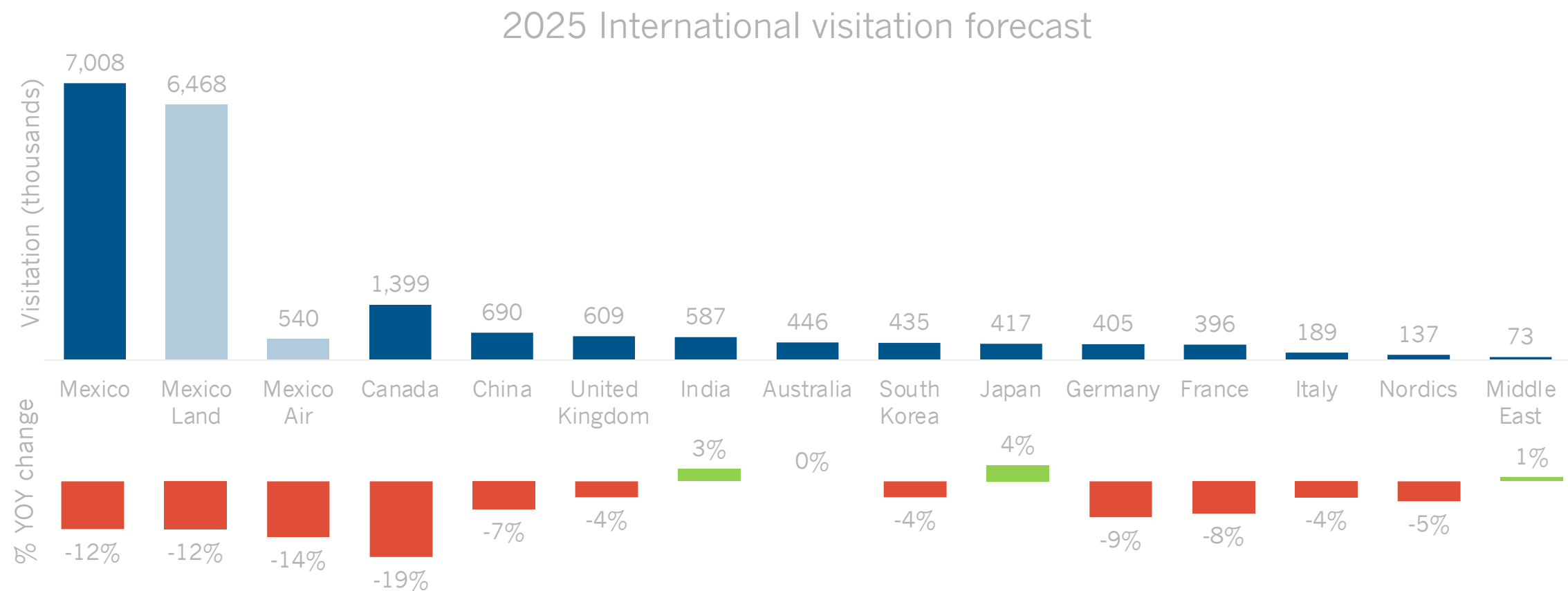
Source: Tourism Economics (May 2025)

California visitor volume forecast

	2024 actual	2025 forecast	YOY % change
Total visits	269.8M	267.8M	-0.7%
Domestic	253.0M	252.5M	-0.2%
International	16.8M	15.3M	-9.2%

Sources: Tourism Economics; STR; Longwoods (domestic); OAG (air traffic); NTTD (international); Dean Runyan (spending); BTS

Forecast: International visitation to California



Source: Tourism Economics (updated May 2025)

‘If you’re not here, you think L.A.’s burning’: Trump’s alarm meets city calm

The demonstrations over immigration raids occupy only a tiny parcel of real estate in this huge metropolis — despite the president’s claims of vast mayhem.

Today at 12:15 p.m. EDT

🔊 6 min 🔖 Summary ➦ 📌 💬 595



Unfolding nationwide

■ Major protests ■ Protests ■ Upcoming protests (Wednesday)



Protests reported up to 5am EST as of 6/11/25

Federal actions messaging framework



Managing the message around:

1. Political climate
2. Safety concerns
3. Exchange rate and cost of travel
4. U.S. perceptions
5. U.S. entry



Driving global demand for California

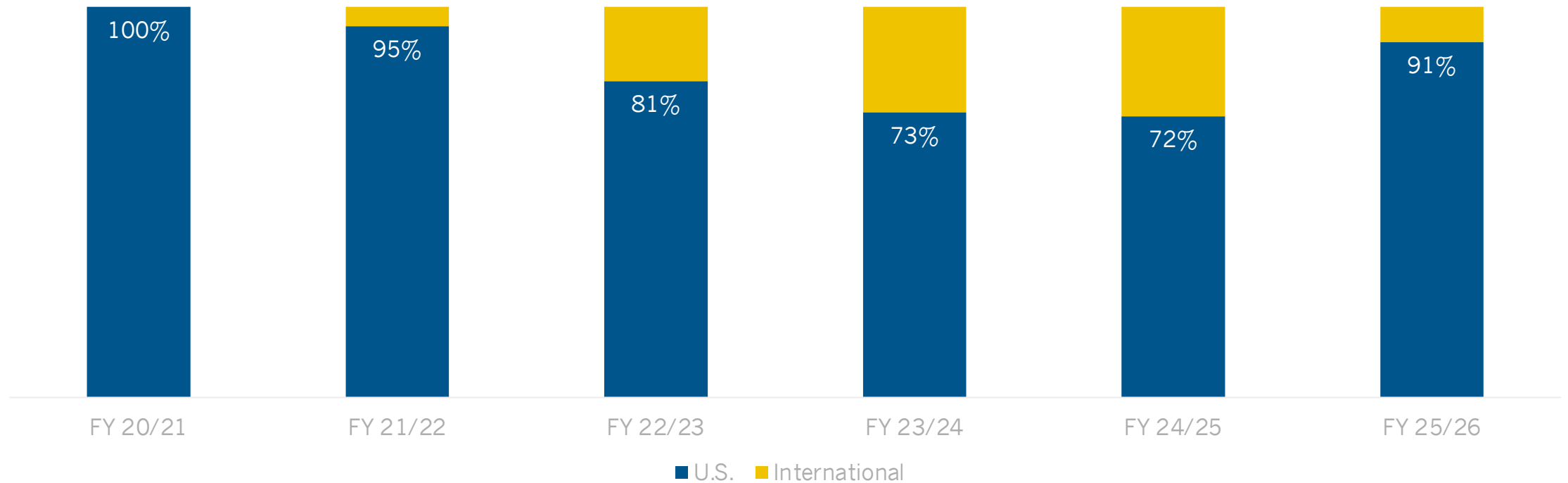
Proposed global media budget

(FY 25/26)

MARKET	CAMPAIGNS RUNNING	JUL	AUG	SEP	OCT	NOV	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	INVESTMENT	IMPRESSIONS
Domestic U.S.	Let's Play, Childhood Rules, Playful Journeys, Meet What's Possible (PME)				OTV, Digital, Social					Linear TV, OTT/CTV, OTV, Digital, Social, DOOH					\$50,000,000	2,205,405,534
		Dynamic Foundational – Digital, Social, Search, Content Distribution and Generative Engine Marketing														
Mexico	SEM/GEO	Search and Generative Engine Marketing													\$1,500,000	246,085,488
	Global Moments Amplification									Digital, Social						
Canada	SEM/GEO	Search and Generative Engine Marketing													\$1,500,000	133,260,657
	Global Moments Amplification										Digital, Social					
U.K.	SEM/GEO	Search and Generative Engine Marketing													\$1,000,000	92,500,932
	Global Moments Amplification								Digital, Social							
Australia	SEM/GEO	Search and Generative Engine Marketing													\$1,000,000	83,058,270
	Global Moments Amplification									Digital, Social						
															\$55 million	2.76 billion

Protect domestic media

Historical allocation of paid media: U.S. vs. international



Source: Visit California



Canada diplomatic campaign

Governor Newsom's welcome message

- Emphasized shared values and West Coast lifestyle with Canada



Canada media blitz



‘Don’t let that ruin your beach plans’:
California tries to coax Canadians back in
tourism campaign amid Trump’s tariffs’



‘California’s governor
releases video hoping to
entice Canadian tourists’



‘California pleads with
Canadians as tourism declines’










visit
California




Canada Exclusive Value Program



Expedia Shop travel ▾ Get the app  CAD  List your property Support Trips  Sign in



Sponsored content by: Visit California




California loves Canadians


California and Canada share more than just a love for stunning landscapes — we share a spirit of adventure, laid-back vibes, and a deep appreciation for the great outdoors. From coastal drives to world-class wine, star-studded cities to peaceful redwood forests, California has something for every Canadian. So, when you're ready, come on down and feel the California love.

Select hotel offers in California

Hotels Tours Sports Universal Studios



Universal Studios Hollywood Tickets
Universal City

Free cancellation
Activity lasts:  2d

CA \$198
per adult

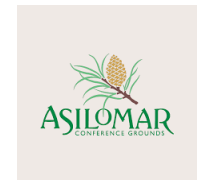


12,000
hotel room nights



1,740
Individual hotel properties

1,000+ California partners





Los Angeles recovery

Paid media support: January 27 – June 30

Los Angeles crisis recovery messaging

January 18 – June 30

BRIDGE/RECOVERY

Phase 1: We♥LA/DineLA

Support of Los Angeles with message of hope resilience

DineLA



RECOVERY

Phase 2: Calling All Californians

Phase 3: California Love

In-state call-to-action; economic message/front line
Drive market call-to-action stimulating immediate
visitation to local businesses and attractions

RECOVERY

**Phase 4:
We Love LA/Partner**

**Phase 5: LA Regional
Support**

Greater Los Angeles Regional
messaging and marketing
program amplification

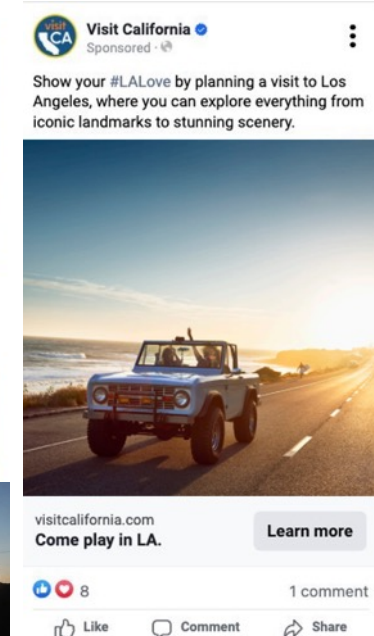
Los Angeles crisis recovery results

\$385 million

Incremental visitor spending
for Los Angeles area

- **280,000** incremental trips
- **\$1,378** average spend per trip

Source: SMARInsights



FY 24/25 Ultimate Playground framework

BRAND CAMPAIGNS

Global
Leisure
Travel



‘Let’s Play’



‘Childhood Rules’



‘Road Trips’

DYNAMIC FOUNDATIONAL CAMPAIGN



Leveraged Media Base – SEM –
Programmatic Digital – Paid Content Distribution

Global
Business
Travel

PROFESSIONAL MEETING & EVENTS CAMPAIGN



‘Meet What’s Possible’

‘Let’s Play’

- FY 24/25 media plan
 - \$23.9 million media buy
 - 1.38 billion impressions





‘Childhood Rules’

- FY 24/25 media plan
 - \$12.6 million media buy
 - 774.7 million impressions





‘Up Around the Bend’

- March 3 launch
- FY 24/25 media plan
 - \$12.6 million media buy
 - 936 million impressions

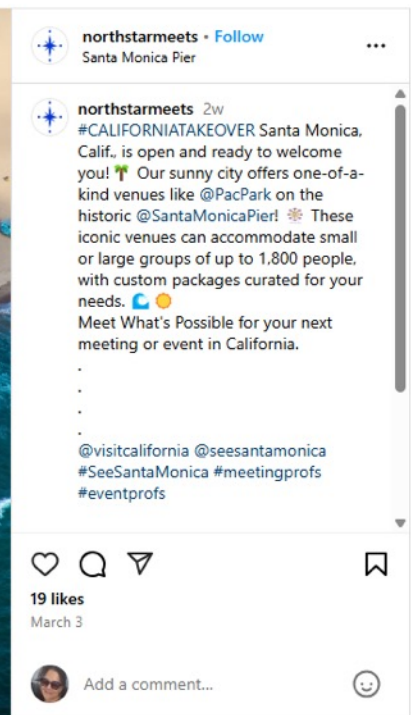






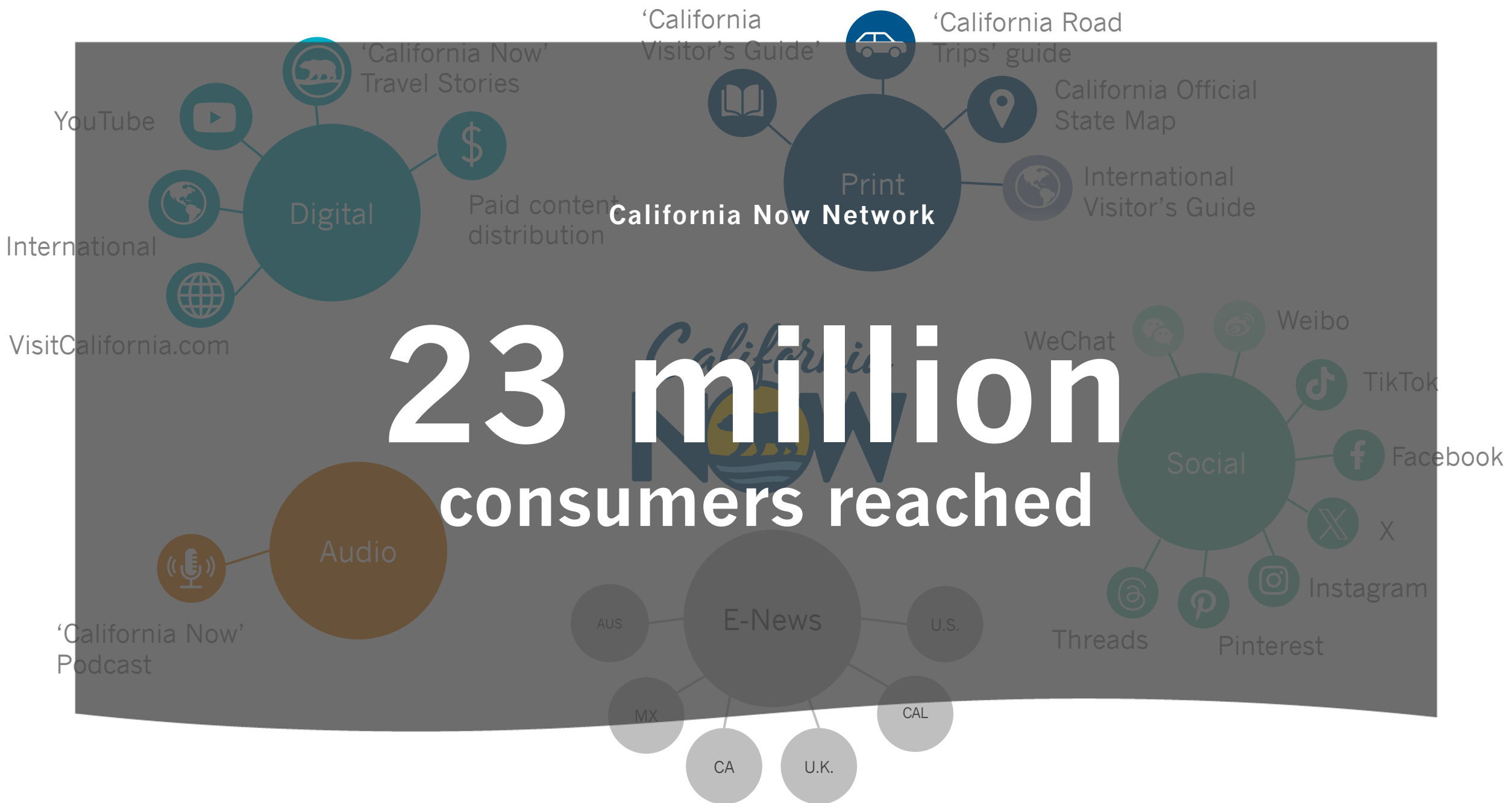
'Meet What's Possible'

- FY 24/25 media plan
 - \$1 million media buy
 - 53.8 million impressions



Experience California

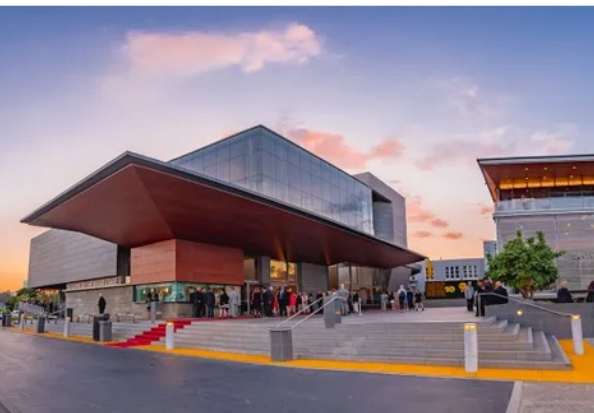




EXPERIENCES / WHERE TO SEE SANTA MONICA'S VIBRANT ART SCENE

Where to See Santa Monica's Vibrant Art Scene

From groundbreaking galleries to vibrant street art and performances, creativity thrives in this coastal culture.



With oceanfront vistas as pretty as a picture, it's no surprise that [Santa Monica's major arts and culture hub](#), with more than 120 museums, galleries, and public art, is within the city's roughly eight square miles. But don't expect ho-hum painting; the city is also home to a vibrant street art scene, with murals and installations that are at the cutting edge of today's art scene.

Santa Monica's Museums

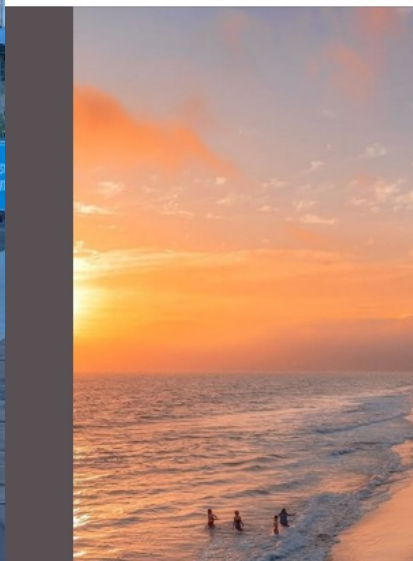
For most people, Santa Monica probably brings the beach and shopping to mind.



Visit California July 20, 2024 ·

Beach life is the best life. 🌊 There's no better way to spend the day along the coast, like at this beautiful spot in Santa Monica.

@dannymedmarcos on IG



visit California 07/22/24

That feeling when you get the perfect shot. Share your picture-perfect moments in California with us. 📸

Santa Monica
itsmattfischer on IG



173 35

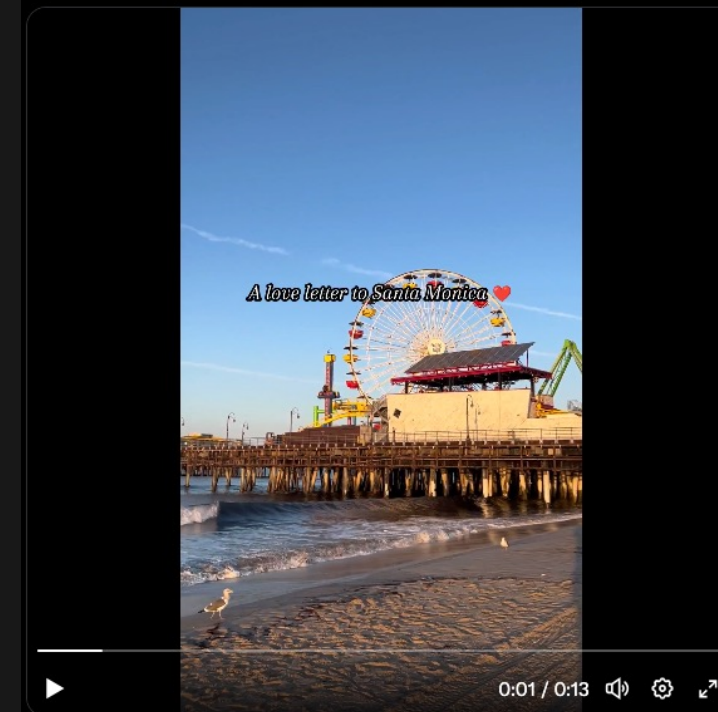
Visit California @VisitCA

Follow

We ❤️ @GoSantaMonica!

Santa Monica is open and ready to be explored. By supporting local businesses and attractions, you'll help the L.A. community. Learn more: bit.ly/4kkzHln

Videos taken on 2/7 and 2/24.



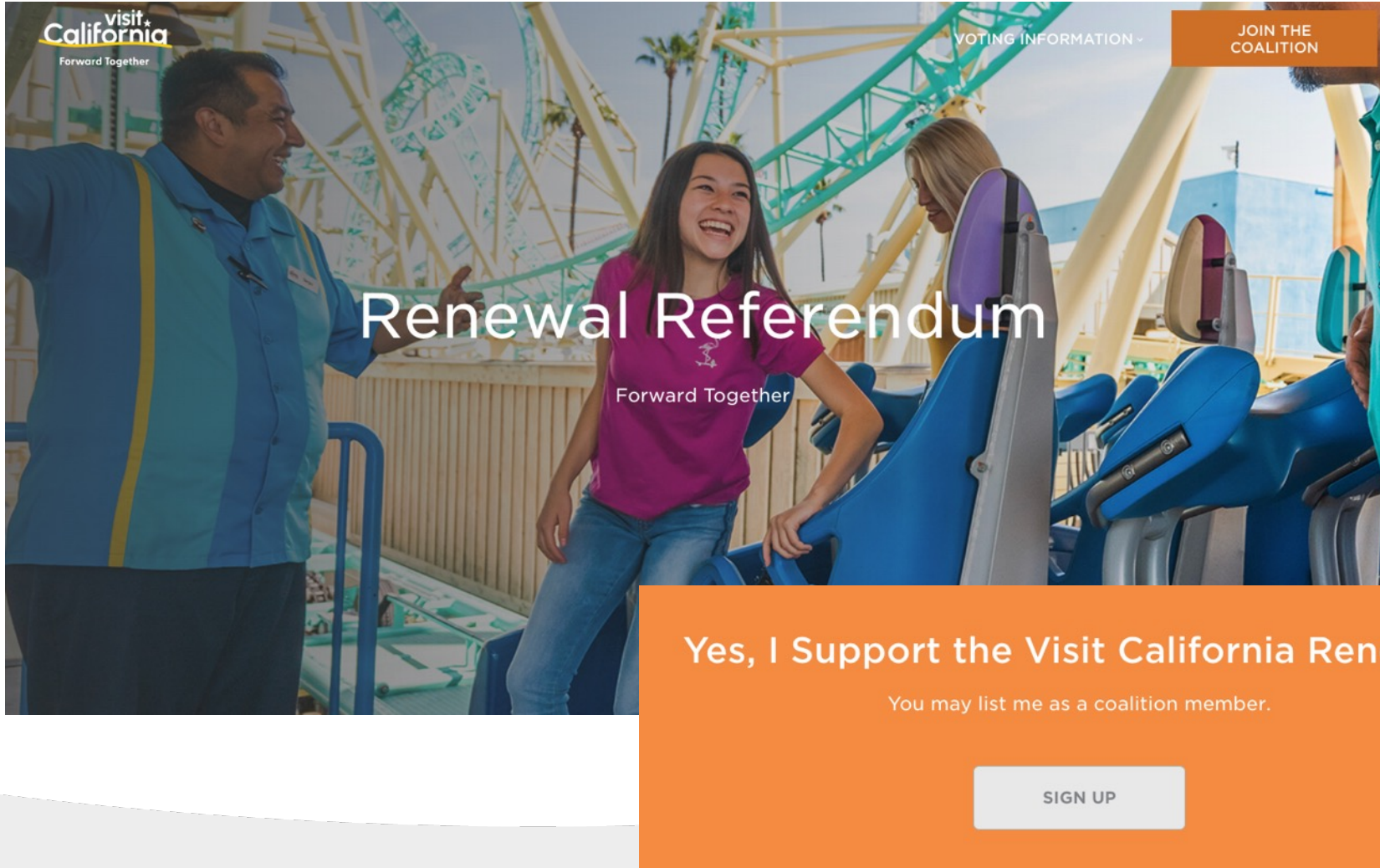
12:23 PM · Feb 28, 2025 · 2,394 Views





2025 Marketing Renewal Referendum

Support Visit California's renewal



visit California
Forward Together

VOTING INFORMATION ~

JOIN THE COALITION

Renewal Referendum

Forward Together

Yes, I Support the Visit California Renewal!

You may list me as a coalition member.

SIGN UP



**Scan to
join today!**



Resources available to you

industry.VisitCalifornia.com

Stay in Touch



Nani Escudero

Los Angeles

Director of Client Relations

nescudero@VisitCalifornia.com

VIDEOS

#1 DINING

AUSTRALIA MARKET

#2 AUSTRALIA

ECONOMIC FORECAST



Lauren Schlau

Founder & President
Lauren Schlau Consulting

*Lauren Schlau
Consulting*

ECONOMIC FORECAST

#3 ECONOMIC FORECAST

AWARDS



Misti Kerns

President/CEO
Santa Monica Travel & Tourism



WE CARE

Santa MoniCARES
TOURISM SUPPORTING OUR COMMUNITY



LENDING A HAND



THANK YOU FIRST RESPONDERS



PCH RE-OPENS



360 PERSPECTIVE



THANK YOU VIPS



EXPERIENCE MANAGEMENT PLAN

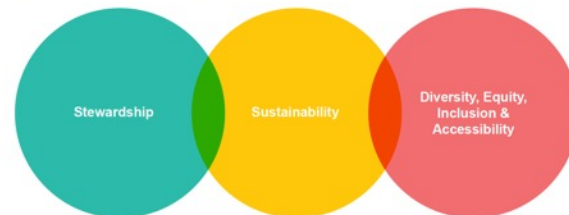


Santa Monica

Experience Management Plan

A Framework for the Future
2022-2032

There are three foundational principles upon which the EMP was created. These principles will provide ongoing guidance as we work together to implement the Plan during the years ahead.



Focusing on Santa Monica's quality of life, culture & heritage, and natural resources

Promoting decisions and action steps that support sustainable practices

Ensuring our decisions equitably support the full diversity of the Santa Monica community

Who helped shape our Experience Management Plan?

The City of Santa Monica and SMTT engaged Coraggio Group, a travel and tourism strategic consultancy, to guide the creation of the Experience Management Plan in close collaboration with team members from SMTT, the City, local businesses, community and cultural organizations, residents and other key stakeholders. Over the course of nine meetings totaling nearly 40 hours of planning time, a combined contribution of more than 500 hours of individuals' time was committed.

What did the process entail?

The two-phase process began in 2018 with a comprehensive discovery phase that identified the key opportunities and threats related to the Santa Monica Experience and the root causes behind them.



ENP COMMITTEES

Governance

Chair: Albin Gielicz

Vice-Chair: Neil Carrey

Facilitator: Misti Kerns

Promote Diversity of Retail, Dining & Evening Experiences

Chair: Peter Trinh

Facilitator: Evan Edwards

Ensure Santa Monica is a Safe & Clean Place to Live & Visit

Chair: Andrew Thomas

Vice-Chair: Becky Warren

Facilitator: Misti Kerns

Highlight & Leverage Cultural Happenings

Chair: Jan Williamson

Vice-Chair: Darlene Evans

Facilitator: Rachel Lozano

Support Livability for the SaMo Community

Chair: Tara Barauskas

Facilitator: Lauren Salisbury



ENP INITIATIVES

- Conducting Santa Monica Police Department de-escalation training sessions for local tourism serving businesses.
- Beginning westside working group to leverage the cultural opportunity of the Los Angeles 2028 Olympics.
- Starting preliminary educational outreach to Santa Monica businesses for the following events:

2026 FIFA World Cup
2026 Route 66 Centennial
2028 Summer Olympics



BOARD OF DIRECTORS



YOUNES ATALLAH
Chairman
Executive Committee
Regent Santa Monica Beach



NEIL CARREY
Member
Resident



JEFF KLOCKE
Member
Pacific Park



CHARLIE LOPEZ-QUINTANA
Vice Chairman
Executive Committee
ETC Hotels



DARLENE EVANS
Member
Resident



SHAHID KAYANI
Member
Hilton Santa Monica
Hotel & Suites



KAREN GINSBERG
Treasurer
Executive Committee
Resident



JAN WILLIAMSON
Member
Resident



ELAINE POLACHEK
Member
City of Santa
Monica Interim
City Manager



LAURALEE ASCH
Secretary
Executive Committee
Resident



TIM DEFURIA
Member
Resident



JUDY KRUGER
Chamber Liaison
Santa Monica Chamber
of Commerce

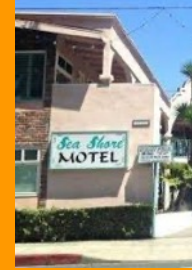
TMD COMMITTEE



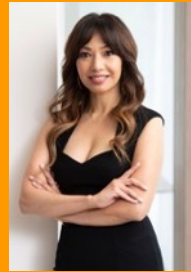
YOUNES ATALLAH
Chairman
Executive Committee
Regent Santa Monica Beach



KARINA SEDIGH
Member
The Pierside
Santa Monica



SONIA METZ
Member
Sea Shore Motel



AILEEN CARREON
Vice Chair
Executive Committee
ETC Hotels



INESSA UDOVCHENKO
Member
The Shore Motel



SIMON FRICKER
Member
Fairmont Miramar
Hotel & Bungalows



CAMERON HASELI
Treasurer/Secretary
Executive Committee
Ocean Park Inn



JUAN VIRAMONTES
Member
The Gateway Hotel



JESSICA RINCON
Member
Sandbourne
Santa Monica

TOURISM CHAMPION



Caroline Beteta
2024 Recipient

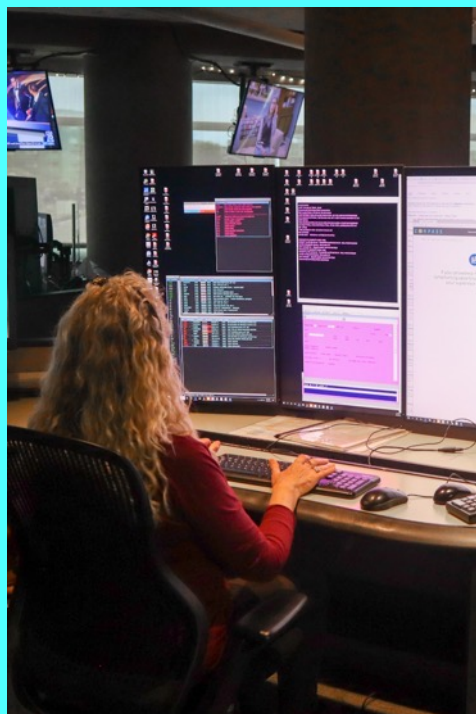


**In Honor of Former
Board Chairman Jeff
King**



Josiah Citrin
2023 Recipient

2025 TOURISM CHAMPION



SANTA MONICA
OFFICE OF EMERGENCY
MANAGEMENT



SANTA MONICA
FIRE DEPARTMENT



SANTA MONICA
POLICE DEPARTMENT

THINGS TO DO

#4 THINGS TO DO

CANADA MARKET

#5 CANADA

SANTA MONICA CHAMBER



Katie Zika

Director of Membership
Santa Monica Chamber of Commerce



THELMA PARKS



"Having found myself a tourist many times, I enjoy putting the visitor first." – *Thelma Parks*

PAST THELMA PARKS



Ramon Jimenez-Bravo
2024 Recipient



Darius Smiley
2022 Recipient



Modesta Melchor
2023 Recipient

2025 THELMA PARKS



Chef Vittorio Lucariello

***Executive Chef
Shutters on the Beach***

2025 Thelma Parks
Tourism Spirit Award Recipient

STAY

#6 STAY

FRANCE MARKET

#7 FRANCE

A NATIONAL PERSPECTIVE



Geoff Freeman

CEO
U.S. Travel Association



US TRAVEL

#8 US
TRAVEL

PANEL MODERATOR



Lauren Salisbury

Vice President of Communications
Santa Monica Travel & Tourism



360 PANEL



JOT CONDIE
PRESIDENT & CEO
CALIFORNIA RESTAURANT
ASSOCIATION



LYNN MOHRFELD
PRESIDENT & CEO
CALIFORNIA HOTEL &
LODGING ASSOCIATION



RACHEL MICHELIN
PRESIDENT & CEO
CALIFORNIA RETAILERS
ASSOCIATION



VIDEOS

#9 SHOPPING

GERMANY MARKET

#10
GERMANY

INDUSTRY TRENDS



Future Partners

Erin Francis – Cummings

President/CEO
Future Partners

Future Partners

The State of Travel and Trends to
Know: Insights for Tourism
Resilience



Opportunity powered by Insight

Future Partners

Bringing the future of travel
within reach

Future Partners

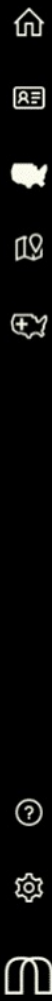
The State of the American Traveler

Methodology

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



- Home Page
- Traveler Snapshot
- The State of the American Traveler
- Destination Snapshot
- The State of the American Traveler+
- Account Settings



Insights Explorer

Future Partners

Updated with September 2024

A large background image showing a blue and white tent pitched on a rocky mountain peak. Two people are standing near the tent, looking out over a vast landscape of mountains and valleys under a sunset sky with orange and blue hues. Other hikers are visible in the distance on the right.

The State of the American Traveler

Welcome back, Future Partners!



NEWS

MONEY

Health

uncertainty

reality,

cop

serious

uncertainty

fear

challenge

baby bo

health care,

education

business

PANICKING

Financial

economic turmoil

worries

money,

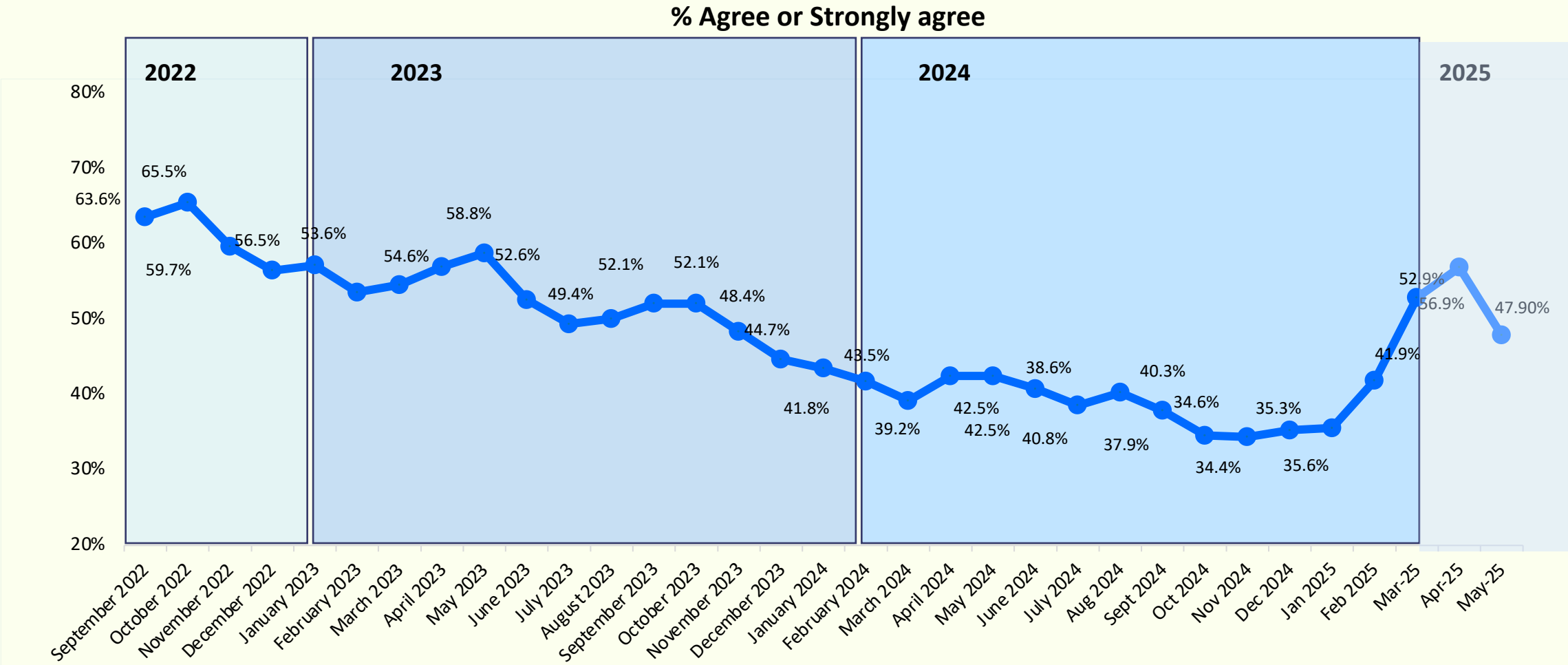
Retirement

oil

Work

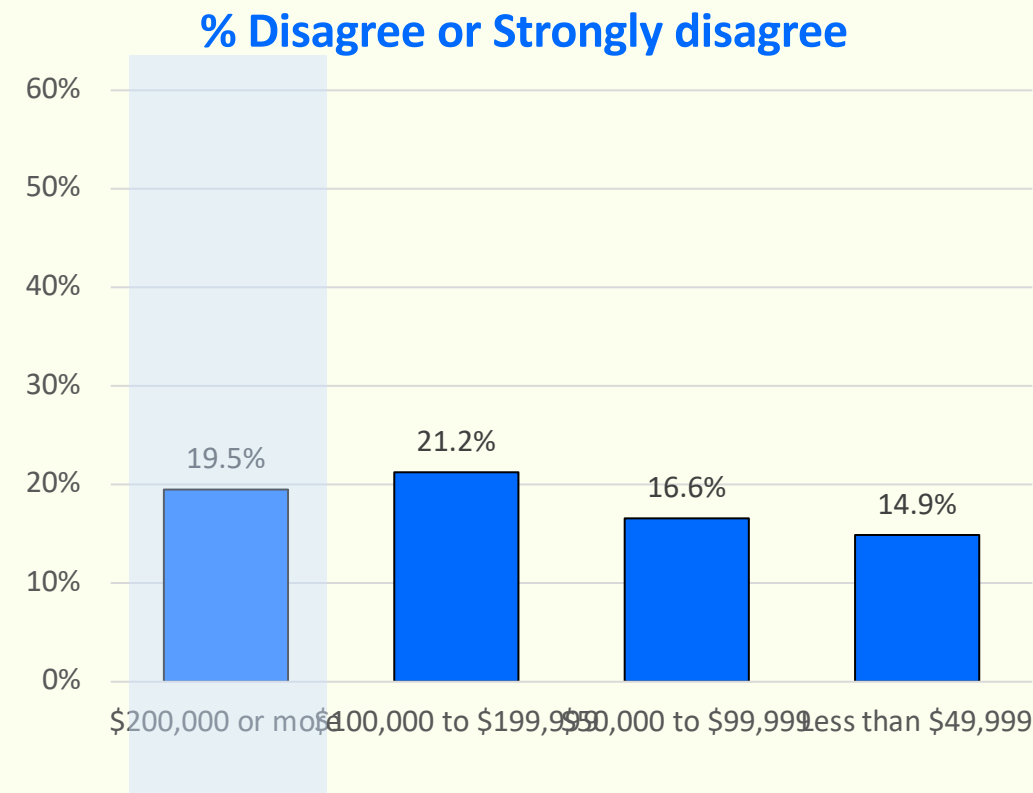
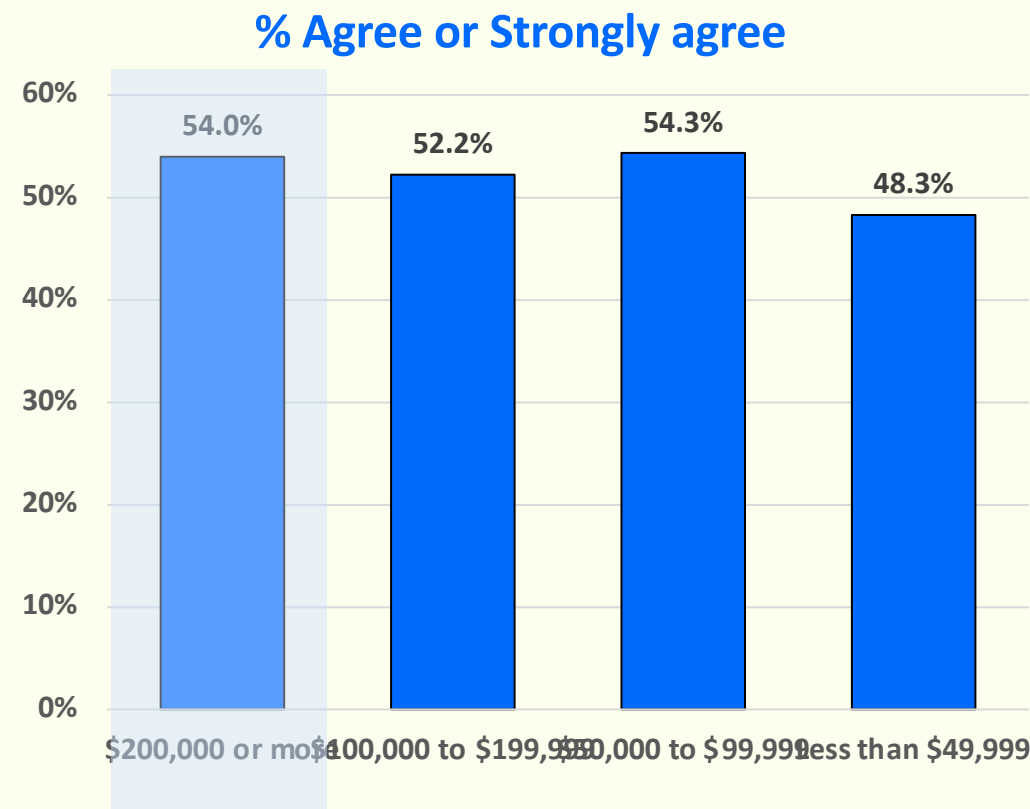
Despite easing a bit recently, recession fears remain prevalent

Statement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



The belief that the U.S. will enter a recession soon is even strong amongst affluent travelers

Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

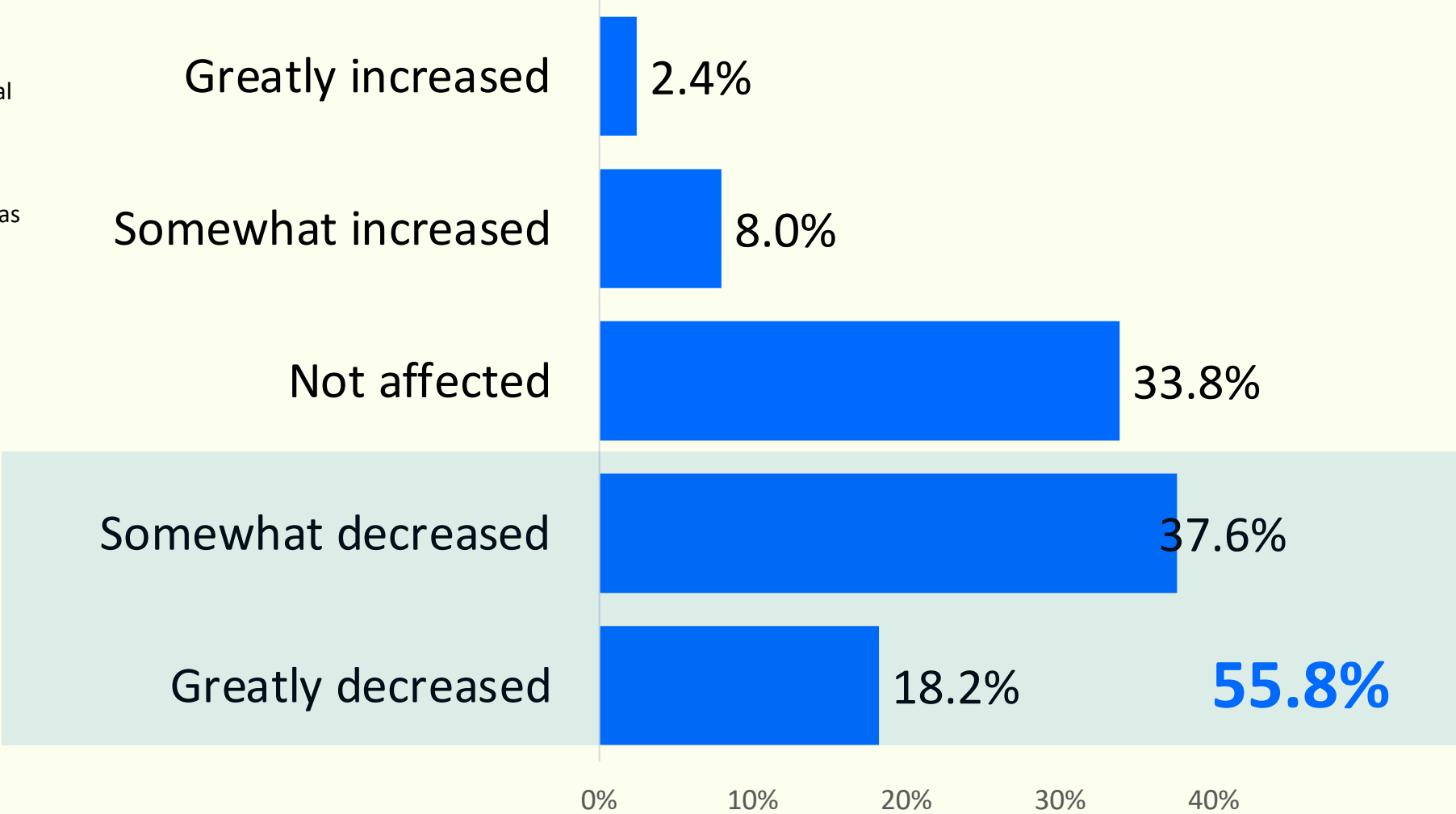


Volatility in the stock market is decreasing the sense of financial security

Question:

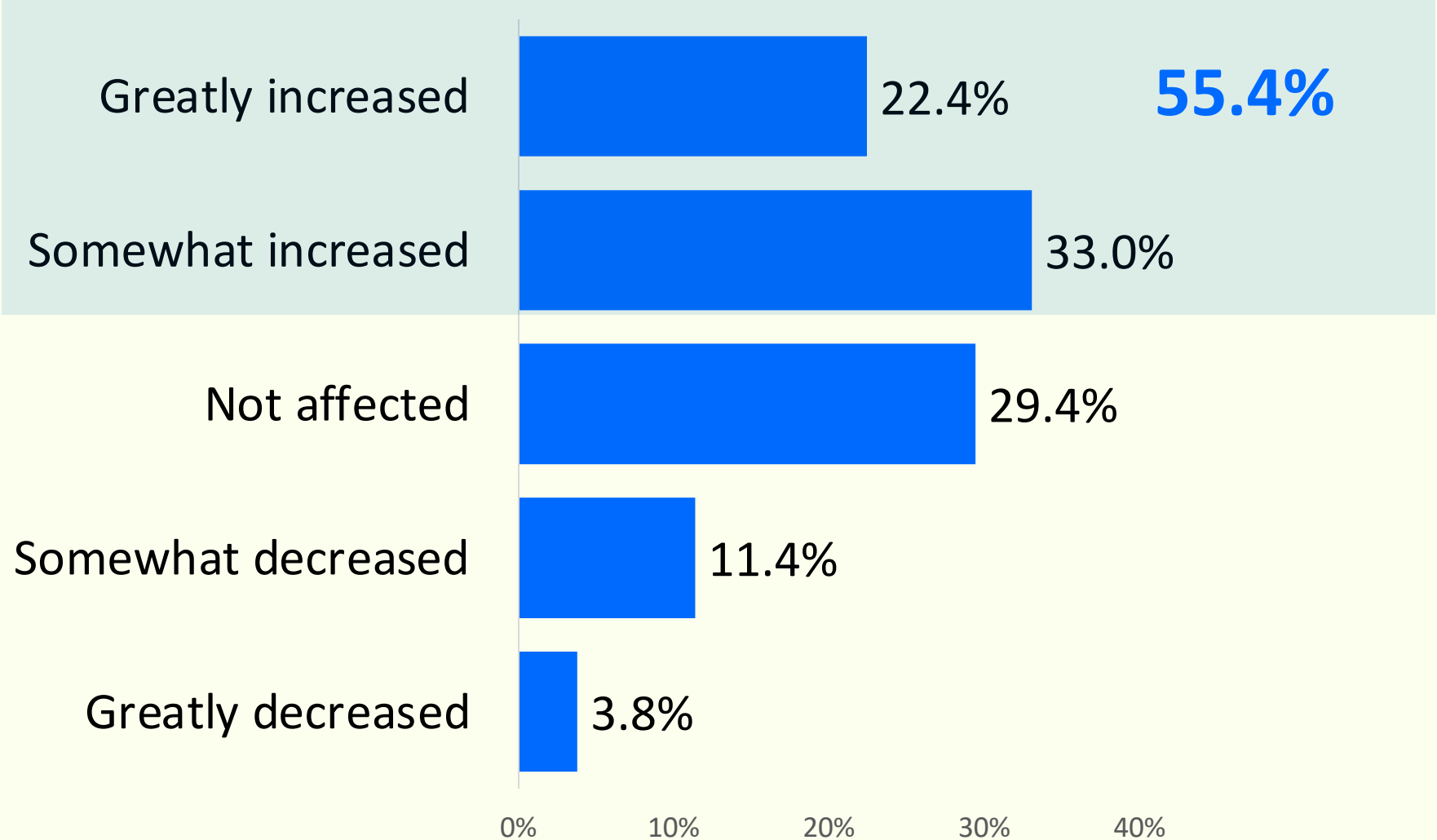
How has recent volatility in the stock market affected your sense of personal financial well-being? (Select one to complete the sentence).

Recent volatility in the stock market has _____ my sense of financial security



Over half of travelers report being increasingly careful with their money due to Recession fears

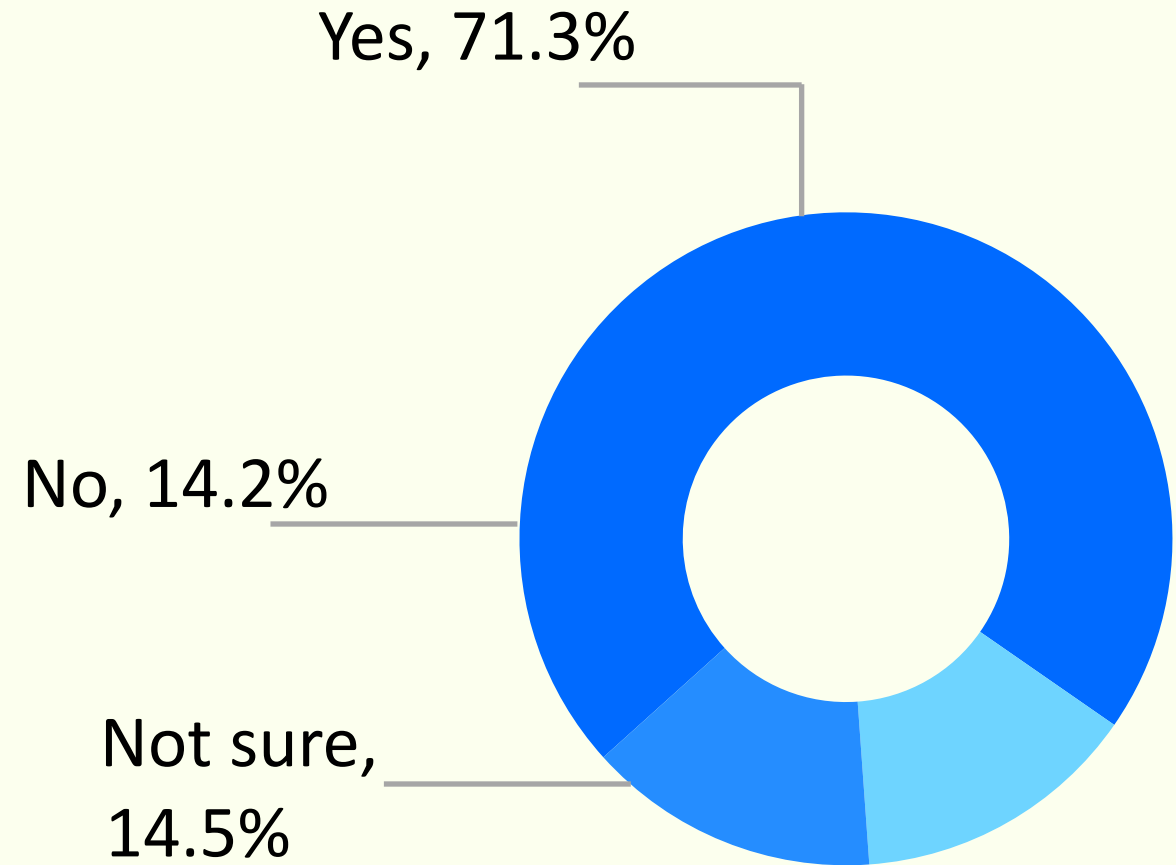
Question:
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



Over 70% believe the new tariffs will increase their cost of living this year

Question:

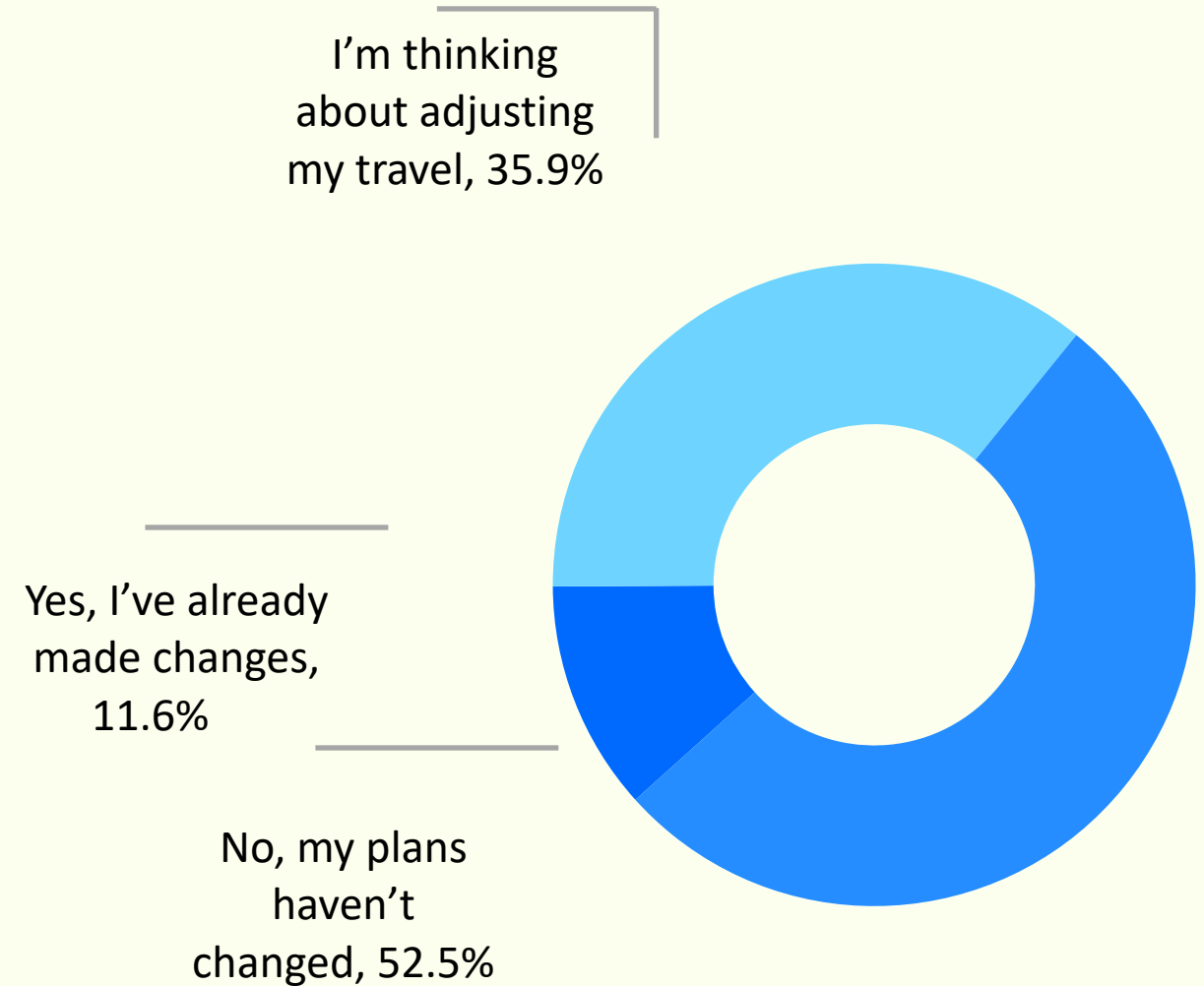
Do you feel that the new tariffs will increase your cost of living in the coming year?



More than one-in-ten have already made travel plan changes due to tariff concerns and over one-third are considering it

Question:

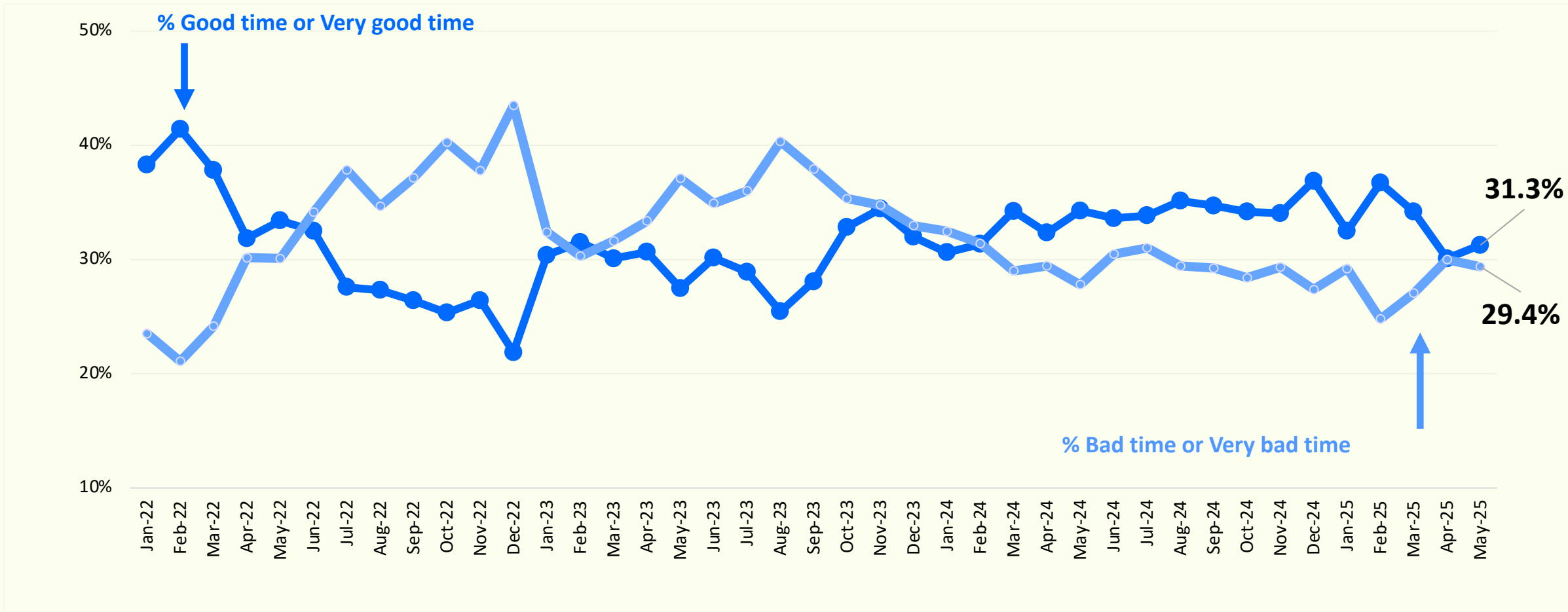
Have concerns about tariffs (or trade disputes/tensions) made you reconsider your travel plans in the next 6 months?



(Base: All respondents, 2,067 completed surveys.)

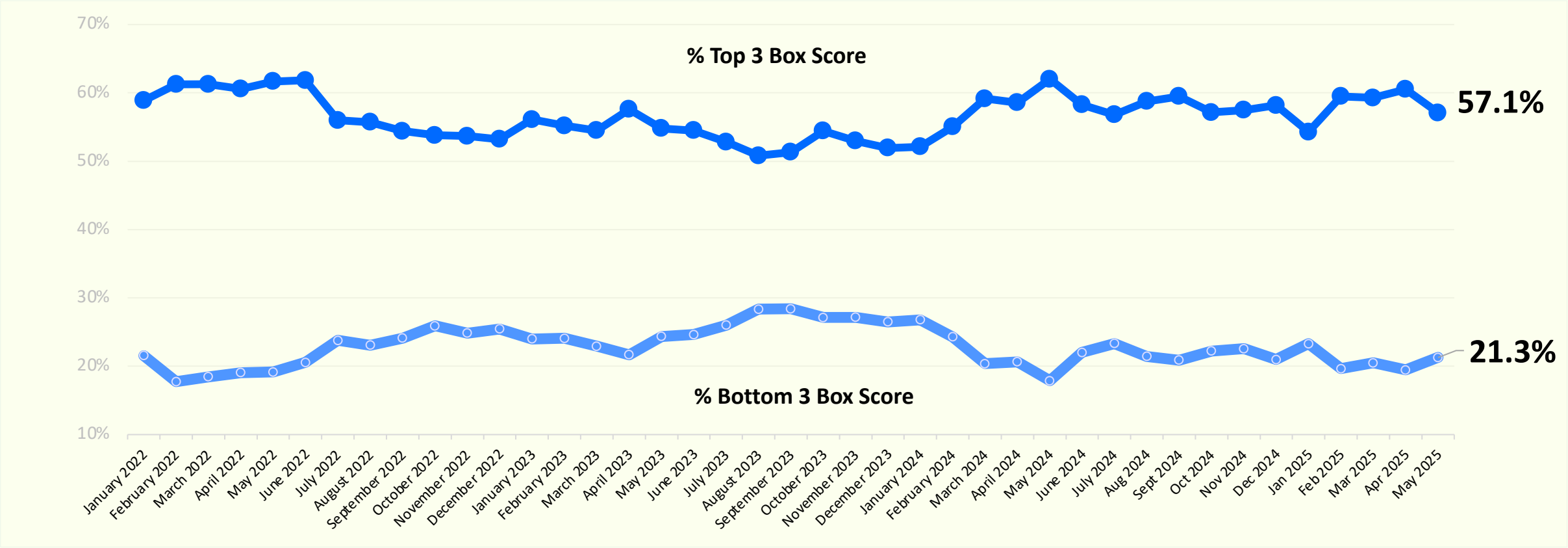
The belief that now is a good time to spend on leisure travel is less stable.

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



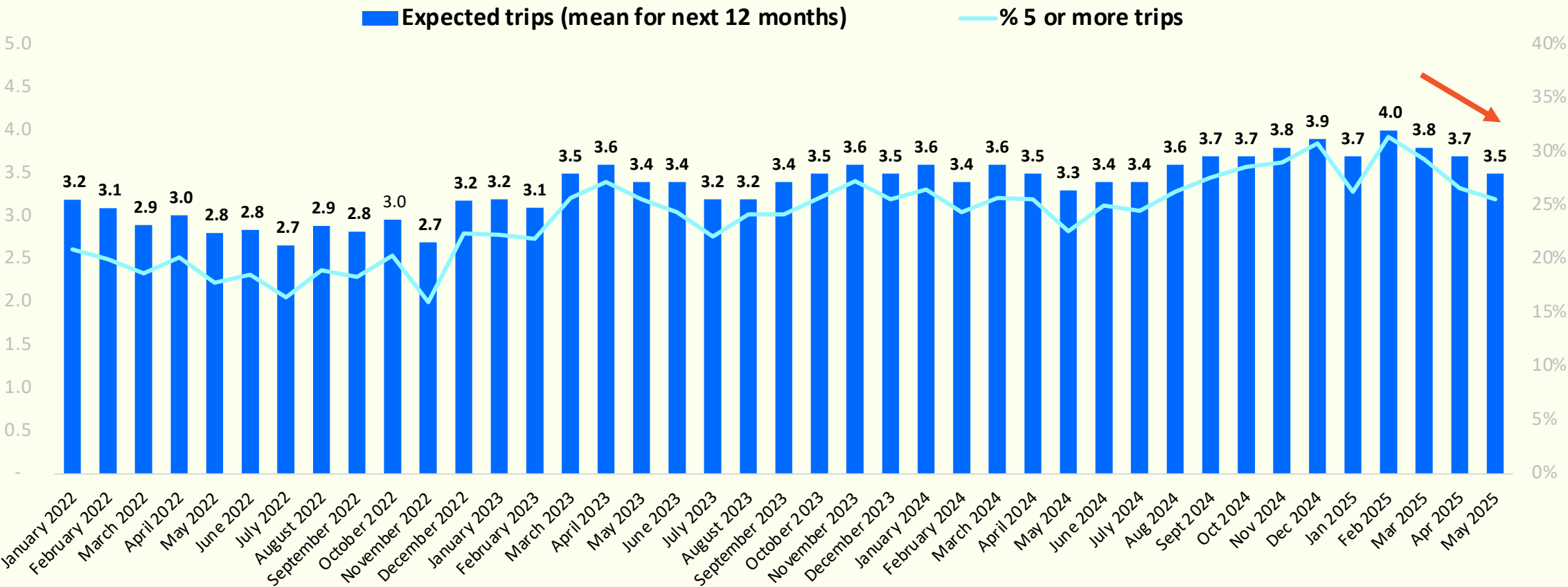
Americans’ intent to make travel a budget priority in the near-term future dipped.

Question: 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.



Expected Trip Volume Declines: Travelers Scale Back

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



Recent deterrents to travel are primarily financial-related

Question:

In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

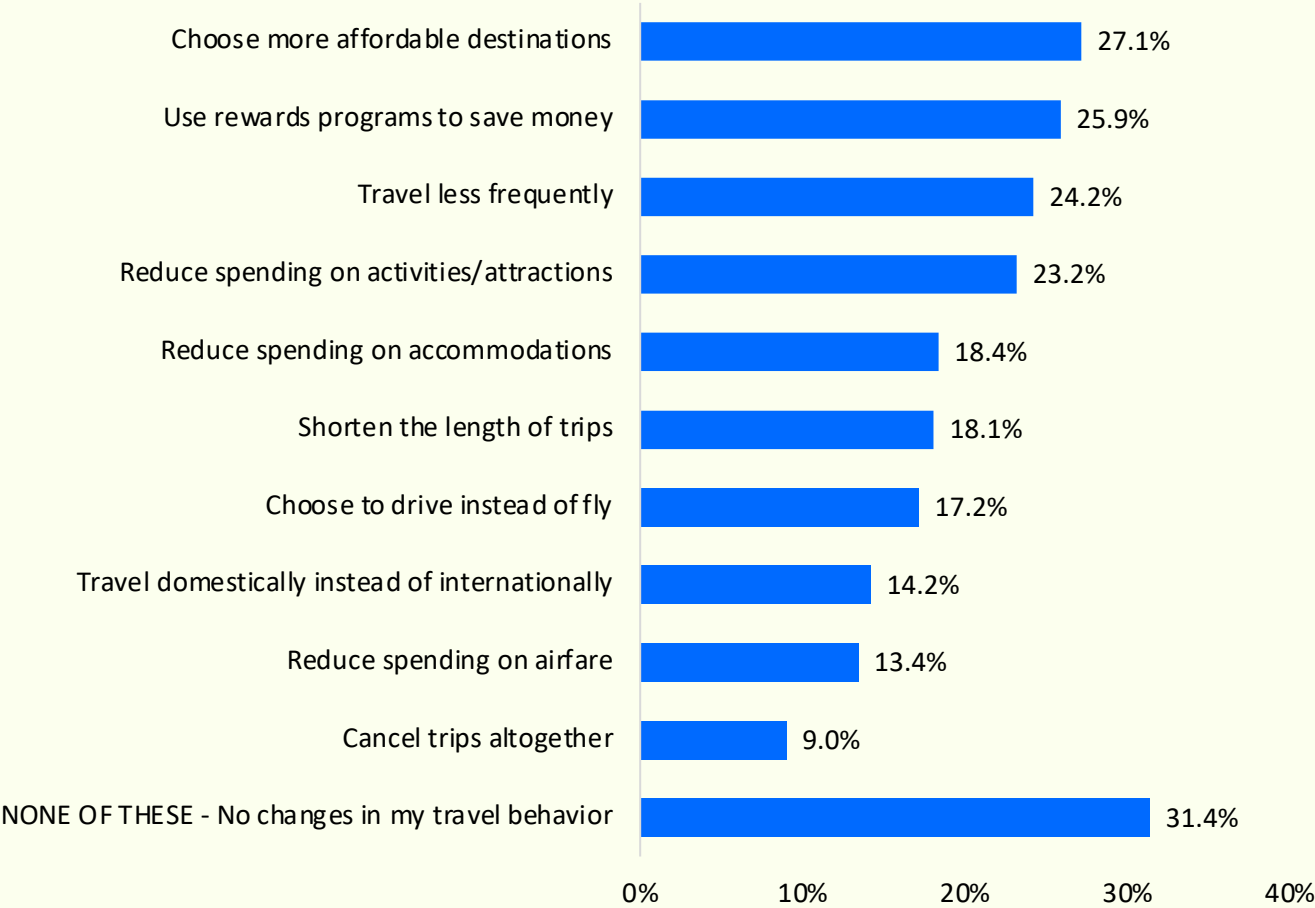


Nearly 70% of travelers report adjusting their approach to travel to contend with economic concerns.

Question:

Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

Due specifically to concerns about the economy, I expect to

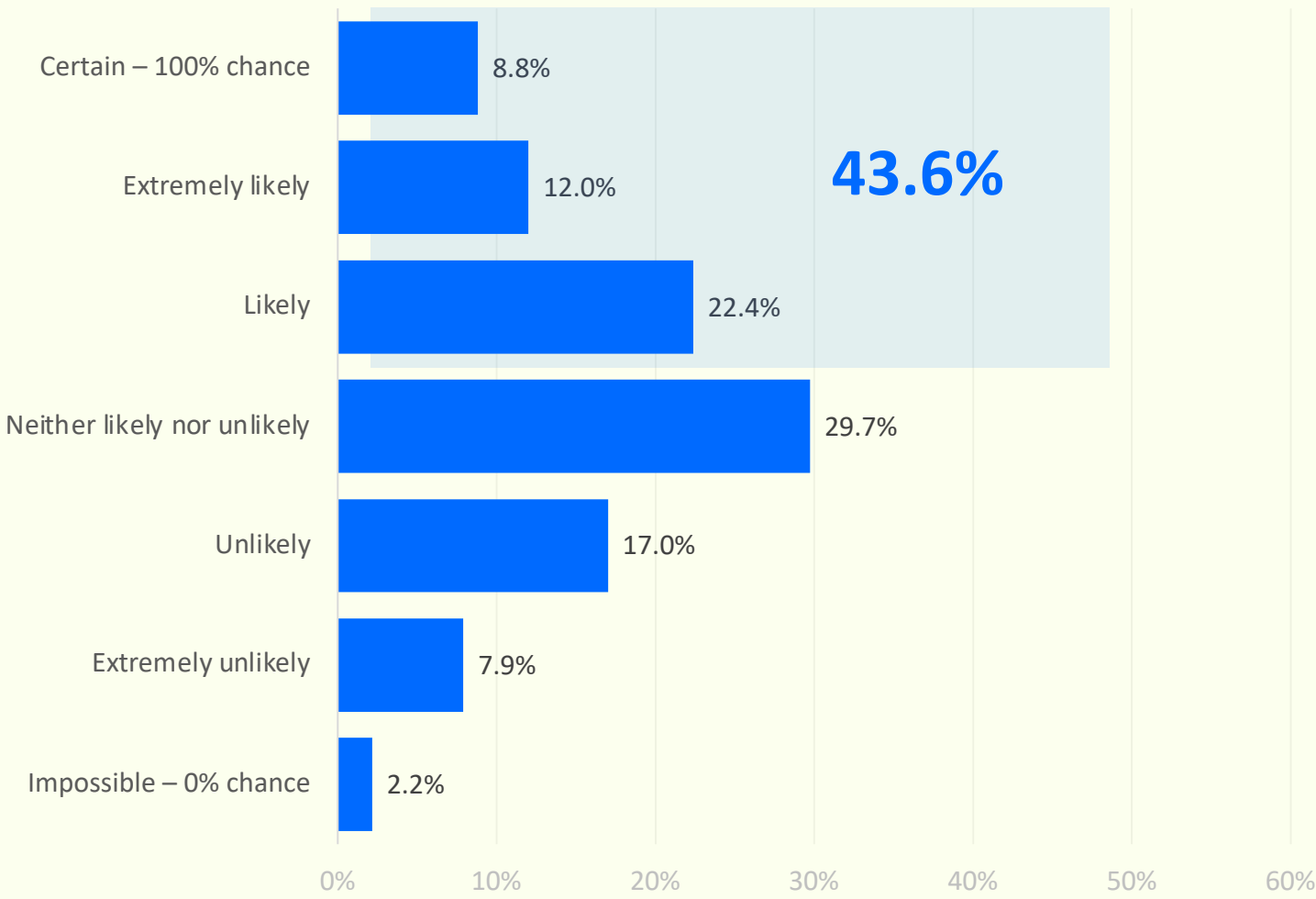


Will international travelers skip the USA in 2025?

43.6% of American travelers think this is likely

Statement:

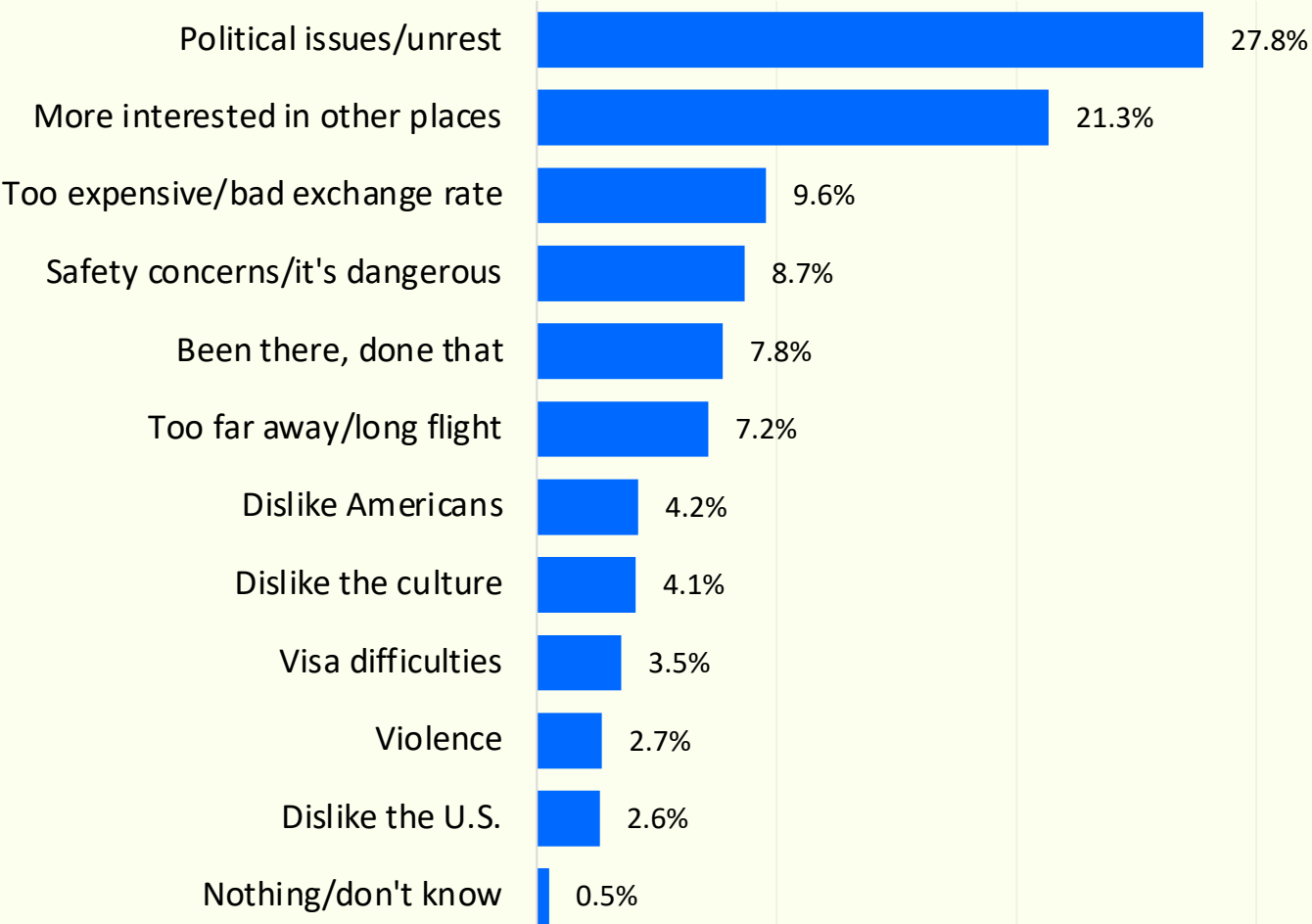
International tourists will avoid visiting the U.S. because of its contentious politics.



Politics is fueling disinterest in the United States

Question: Please describe why you are not interested in visiting the United States of America.

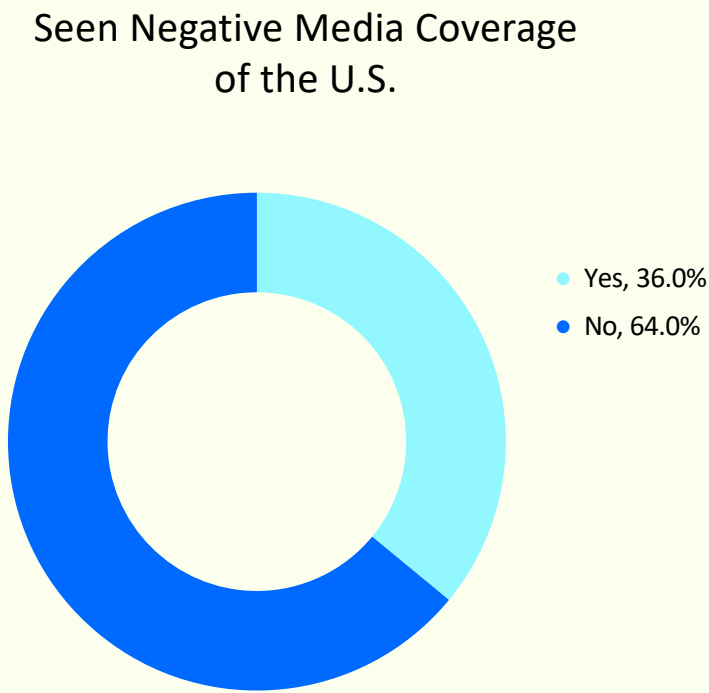
Reasons Why Global Travelers are Not Interested in Visiting the U.S. (Unaided, Total Aggregate)



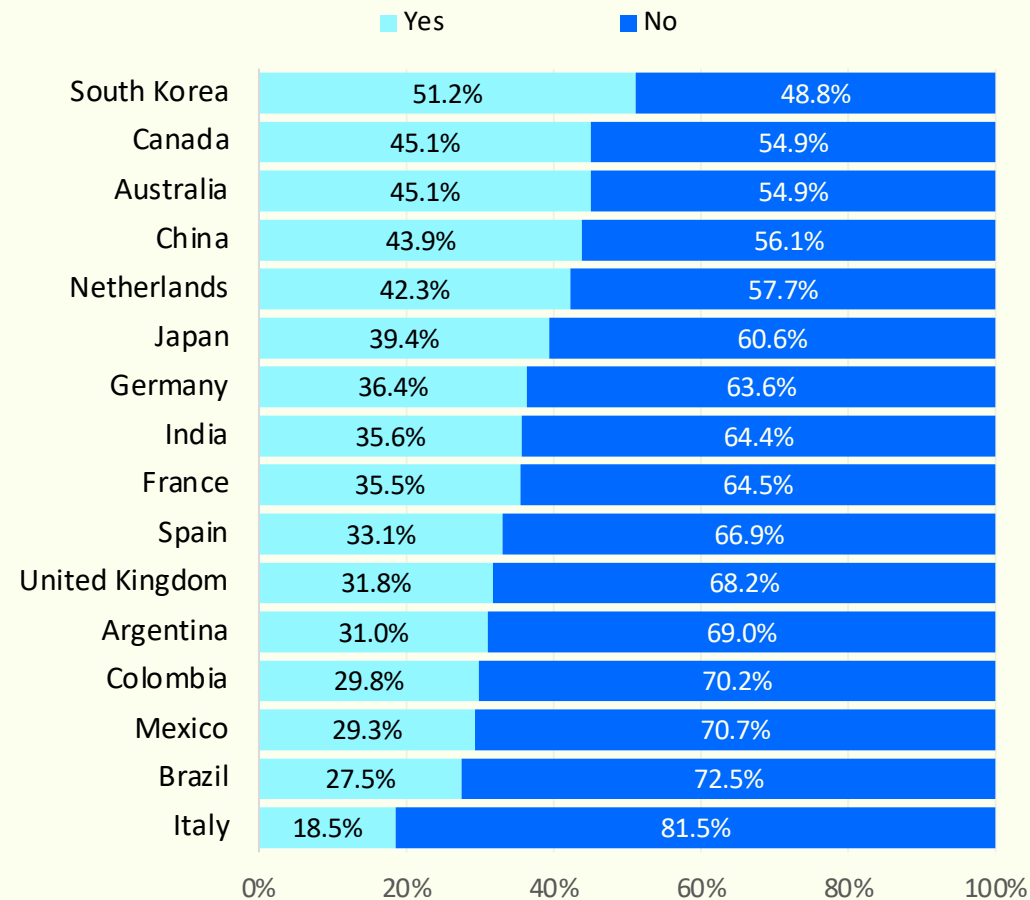
Base: Respondents who are not interested in visiting the U.S. in the next year (993 responses).

38% of international travelers report seeing negative media coverage of the U.S.

Question: Do you recall seeing negative media coverage about major U.S. cities?



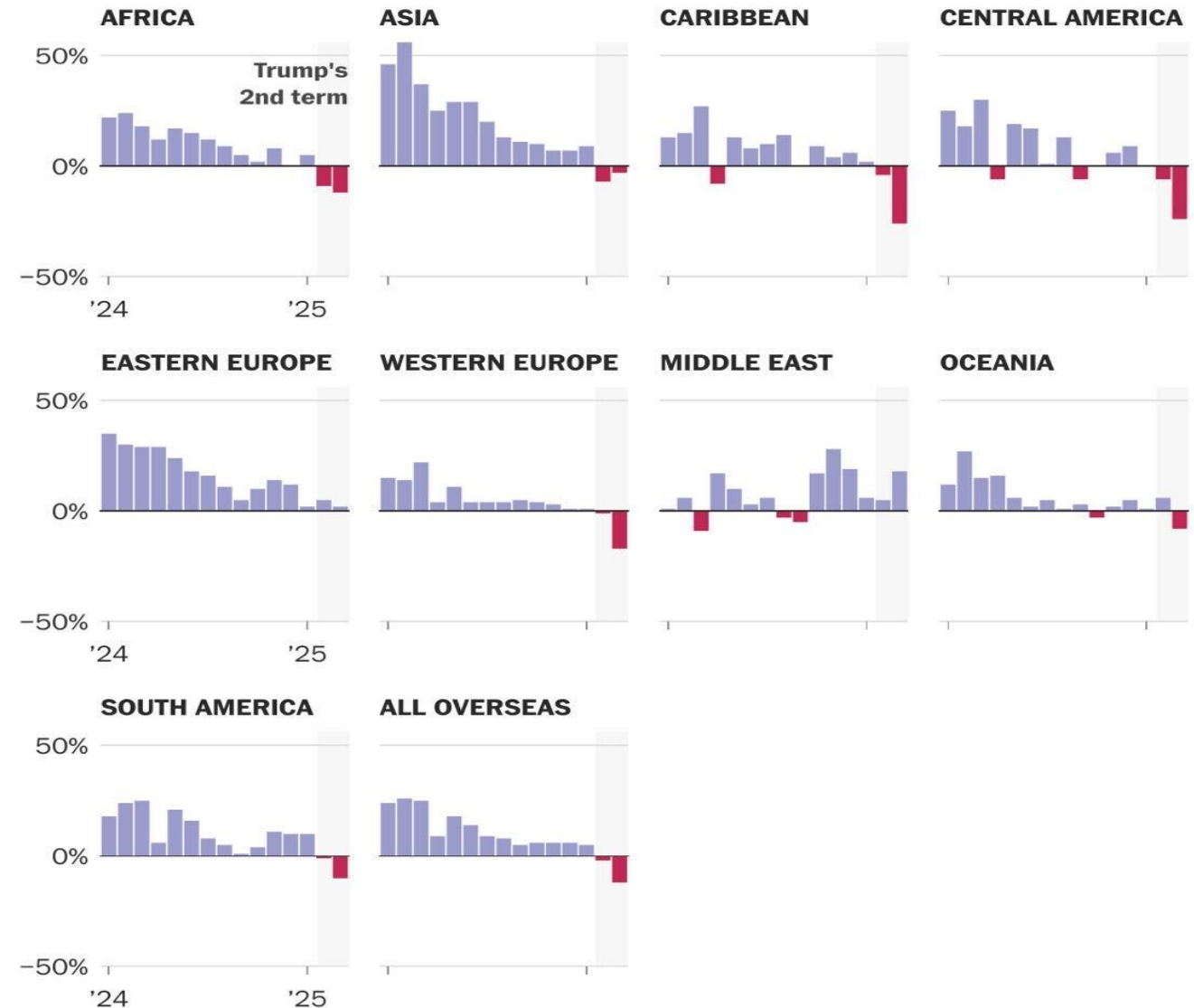
Seen Negative Media Coverage of the U.S. – By Market



A valid prediction: Travel to the U.S. had at least 2 months of declines

Travel to the U.S. is declining year-on-year

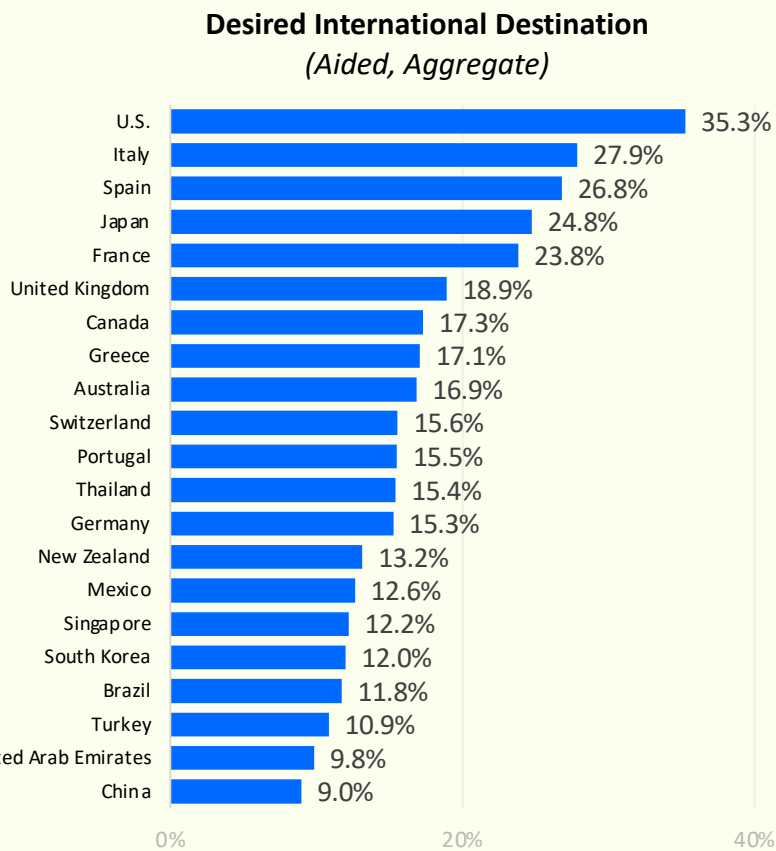
Monthly year-over-year percent change in international visitor arrivals by region



Overseas figures exclude Mexico and Canada. Preliminary ITA data for Canada and Mexico for February and March 2025 is not yet available.

Source: International Trade Administration

In January, one in three international travelers selected the U.S. as a desired destination for the next year, outpacing all competitors. Japan, Italy, and Spain are the biggest competitors to watch



Desired International Destination: U.S. Ranking
(Aided, By Market)

	% Selected U.S.	U.S. Rank
Brazil	49.9%	1
Mexico	47.8%	1
Colombia	46.4%	2
Canada	46.3%	1
Argentina	42.4%	3
India	41.8%	1
China	40.7%	1
Spain	36.7%	2
Italy	33.6%	2
Japan	32.0%	1
United Kingdom	30.8%	3
South Korea	29.0%	2
France	28.5%	3
Australia	24.6%	3
Germany	17.1%	9
Netherlands	16.4%	8

Insights to for Travel Resilience

Capitalizing on Travel Motivations

Optimizing for Trends

Deepening Understanding of How to Reach Travelers

Future Partners



Travel Motivations

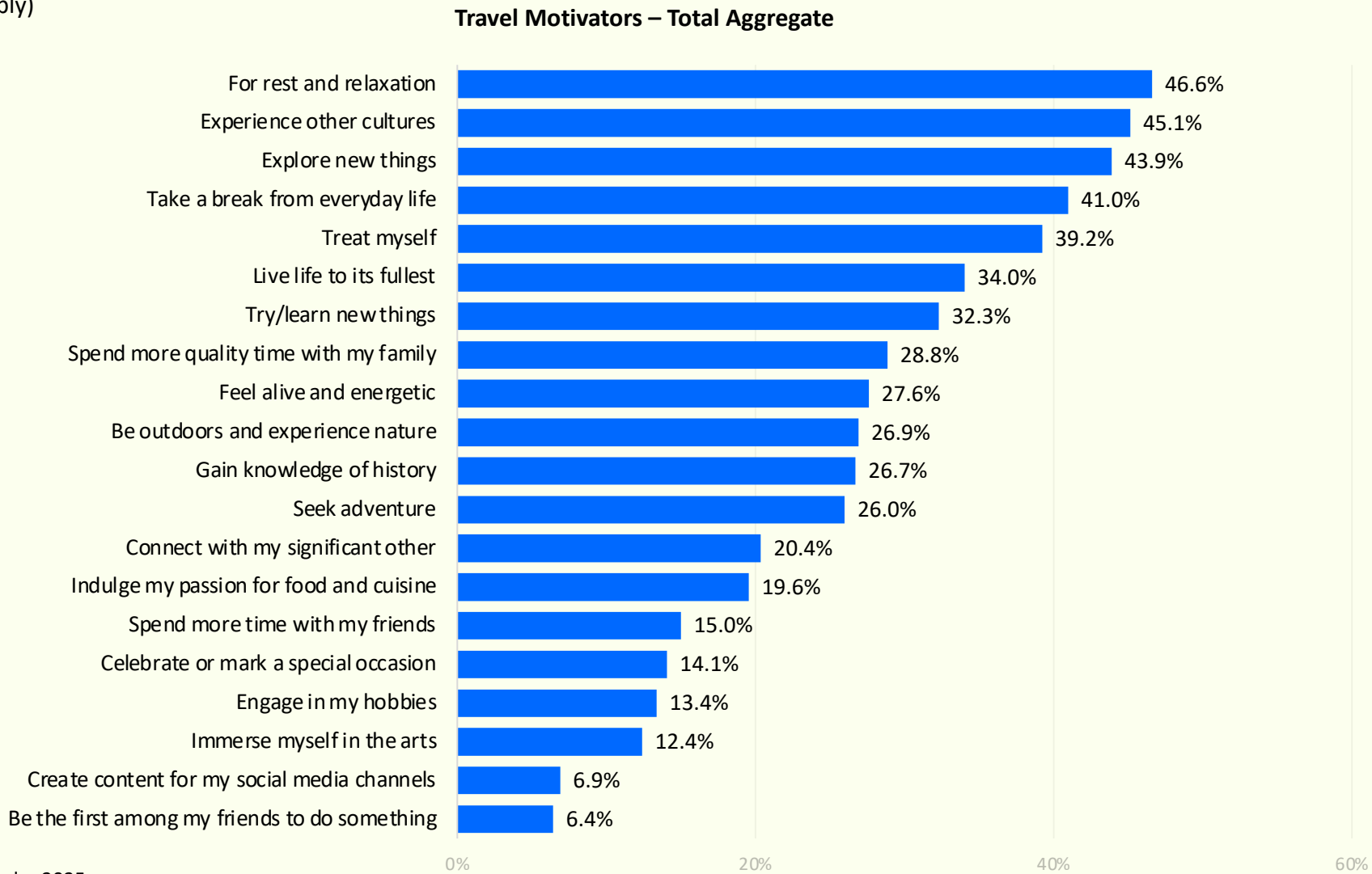
Intrinsic Motivation

The cheese can wait. This is FUN!



Why do we travel? Rest, Reward, Research, Ramble, Reflection

Question: Why do you travel? (Select all that apply)

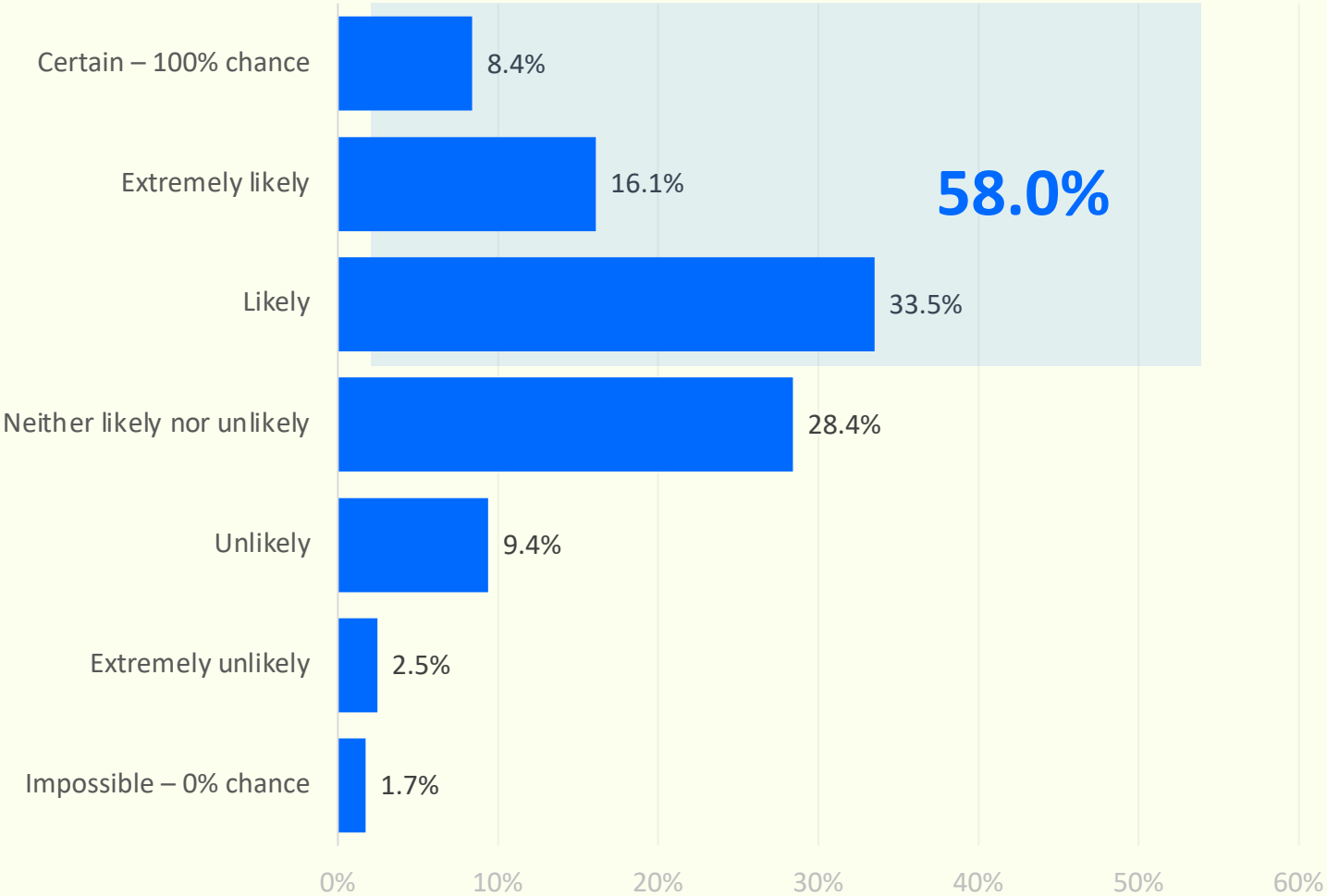


Base: Total (13,200 responses).

A significant number will use travel as a way to step outside their comfort zone this year.

Statement:

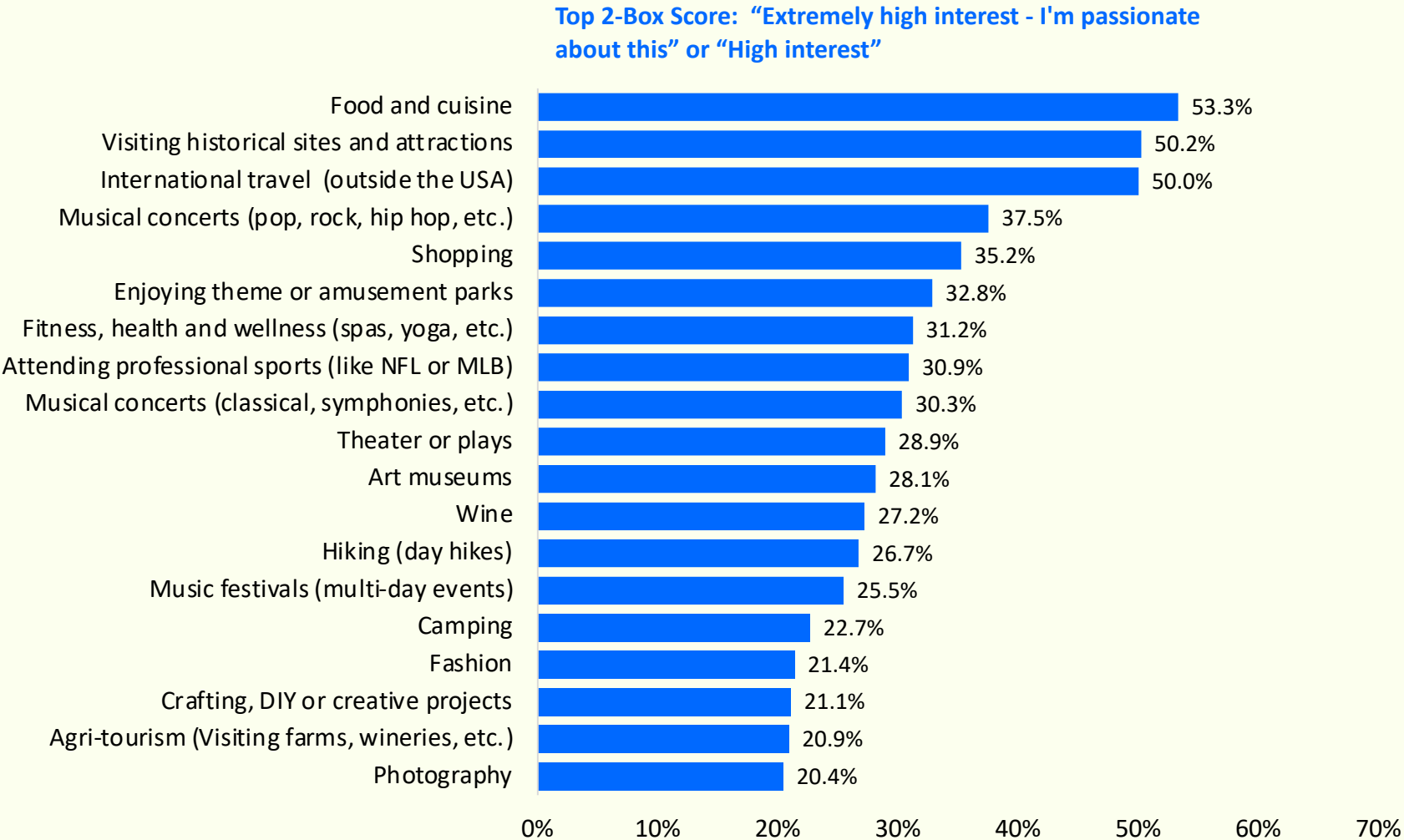
I will use travel as an opportunity to step outside my comfort zone.



Food, history, international exploration, concerts and shopping top travelers' passions right now

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

Base: American travelers. Total Respondents



Top 5 Passions by Generation

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

Top 2-Box Score: “Extremely high interest - I’m passionate about this” or “High interest”

Gen Z	Millennial	Gen X	Baby Boomer+
1. Food and cuisine (58.9%)	1. Food and cuisine (64.3%)	1. Food and cuisine (57.2%)	1. Historical sites (51.2%)
2. Fitness and wellness (54.4%)	2. International travel (55.2%)	2. International travel (52.9%)	2. International travel (43.4%)
3. International travel (53.9%)	3. Historical sites (49.9%)	3. Historical sites (50.2%)	3. Food and cuisine (41.4%)
4. Video games (52.6%)	4. Theme parks (47.6%)	4. Musical concerts (38.5%)	4. Musical concerts (28.8%)
5. Shopping (51.2%)	5. Shopping (47.6%)	5. Shopping (35.6%)	5. Theater or plays (25.7%)

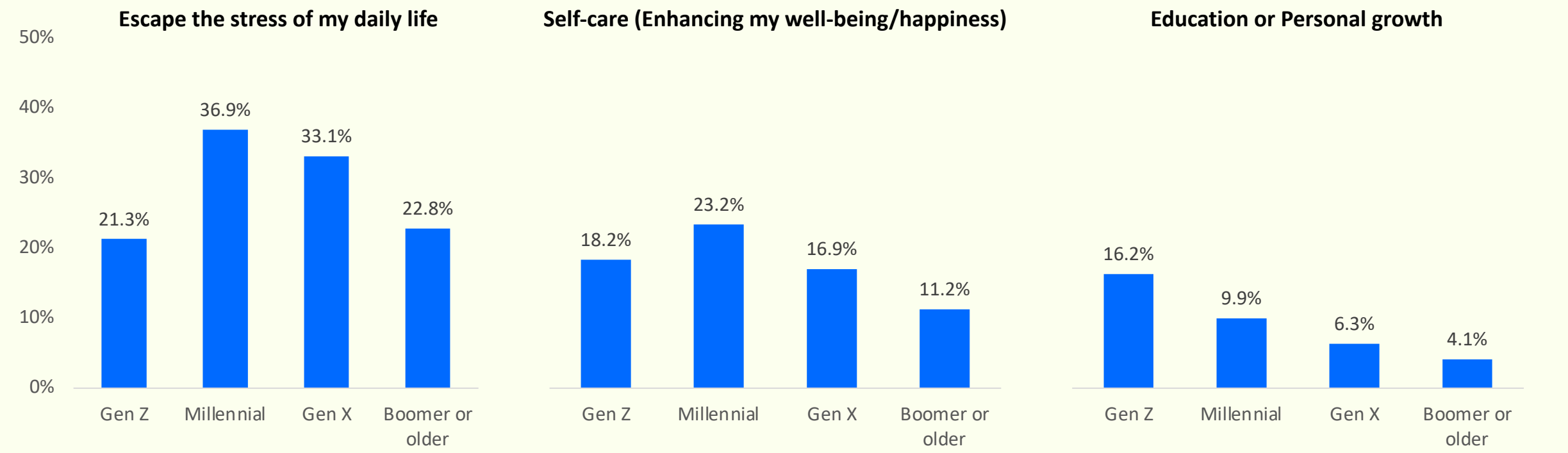
After visiting friends or relatives, relaxation and de-stressing are the top reasons for travelers' most recent overnight trips, followed by exploration, self-care, nature, culture & romance

Question:
Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?



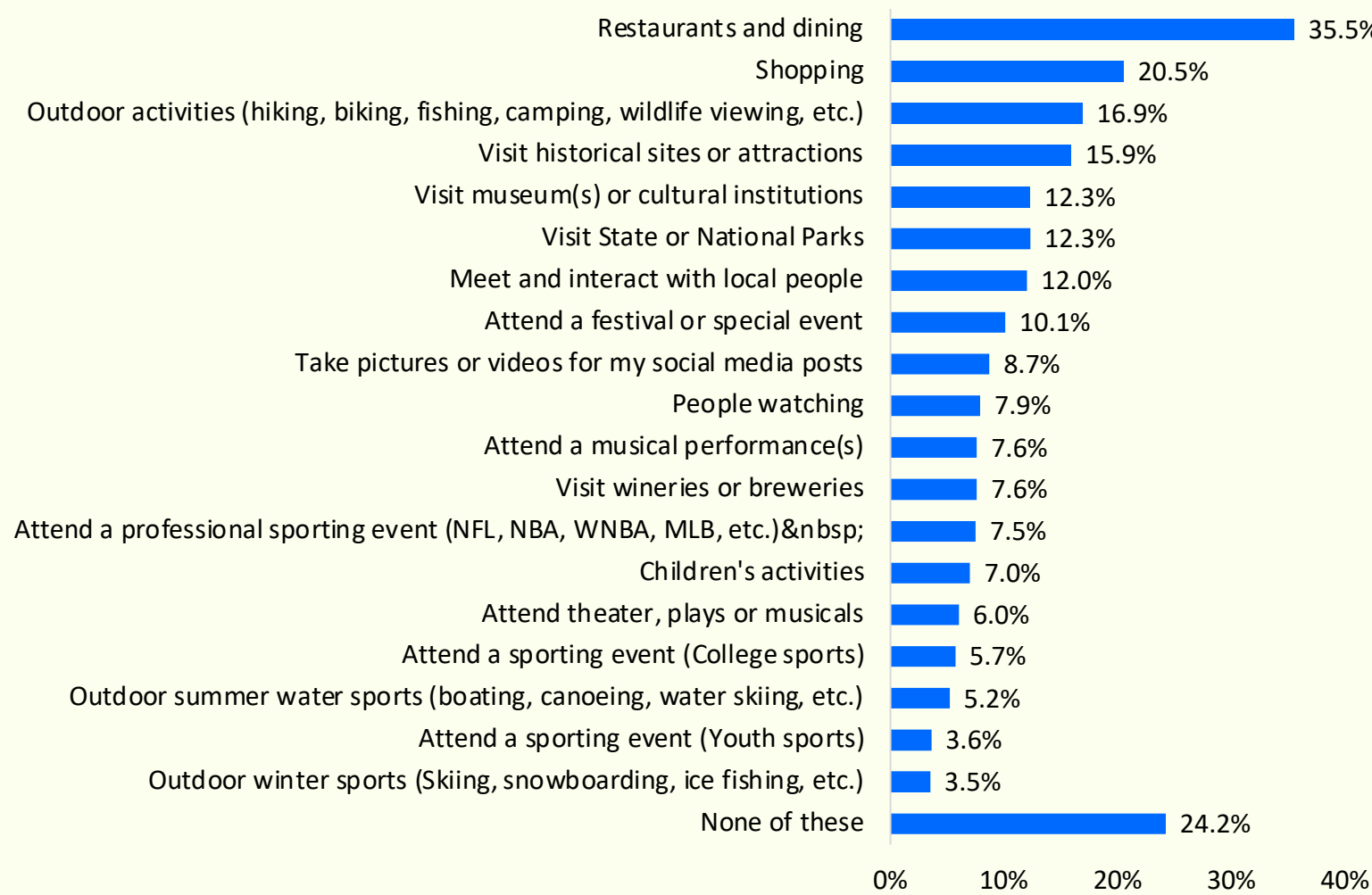
Millennials and Gen X are most looking to escape stress; Millennials are most likely to look for self-care; GenZ is the likeliest to be pursuing educational experiences in travel

Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?



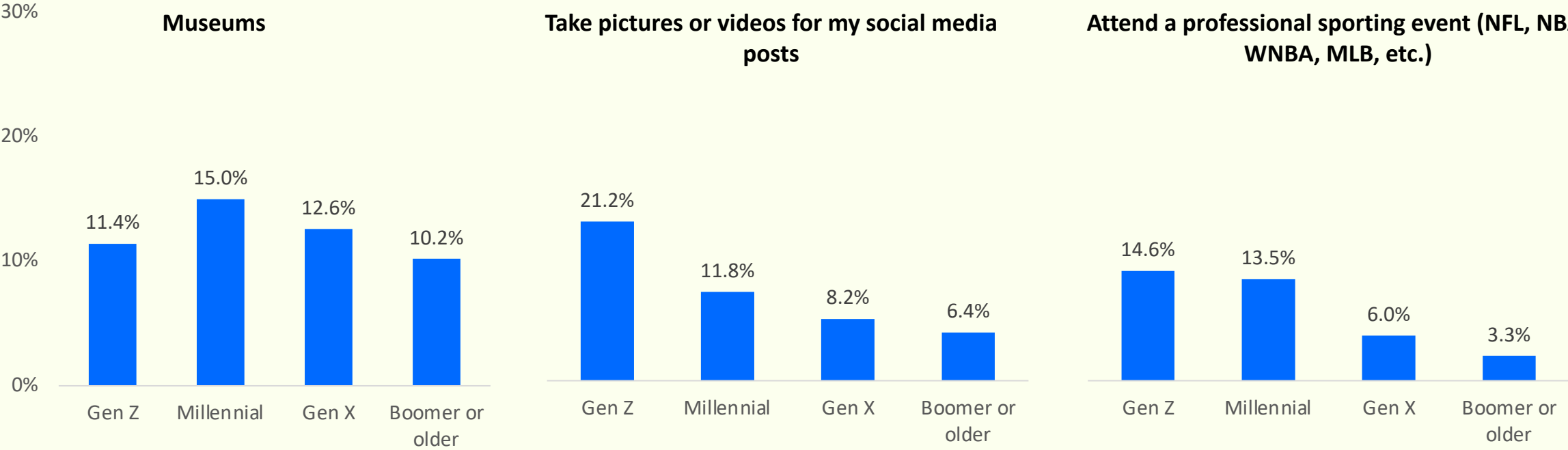
Dining and shopping activities were by far the most important in travelers' decisions to take their most recent overnight trip, followed by outdoor activities and historical attractions

Question:
Which of the following SPECIFIC TRAVEL ACTIVITIES were important in your decision to take this most recent overnight trip?



Social media content was a decision driver for Gen Z; Millennials are loving museums. Pro-sports events motivate younger travelers overall

Question: Which of the following SPECIFIC TRAVEL ACTIVITIES were important in your decision to take this most recent overnight trip?

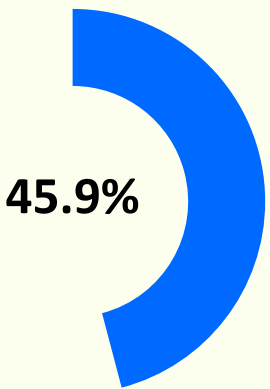


Luxury experiences are important to a significant share of travelers, particularly Millennials

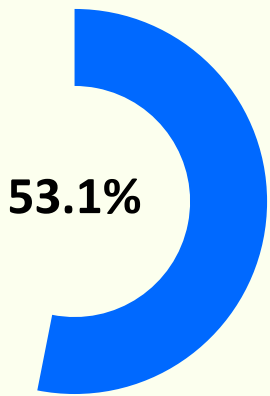
Question: How much do you agree or disagree with this statement? Having luxury travel experiences is usually an important part of my leisure trips.

Top 2 Box Agreement

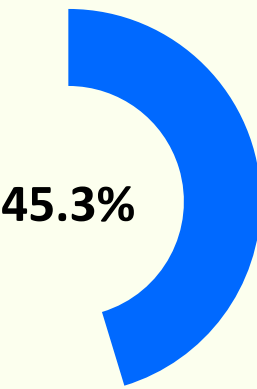
Gen Z



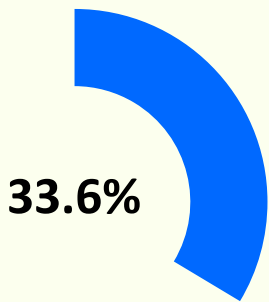
Millennial



Gen X



Baby Boomer

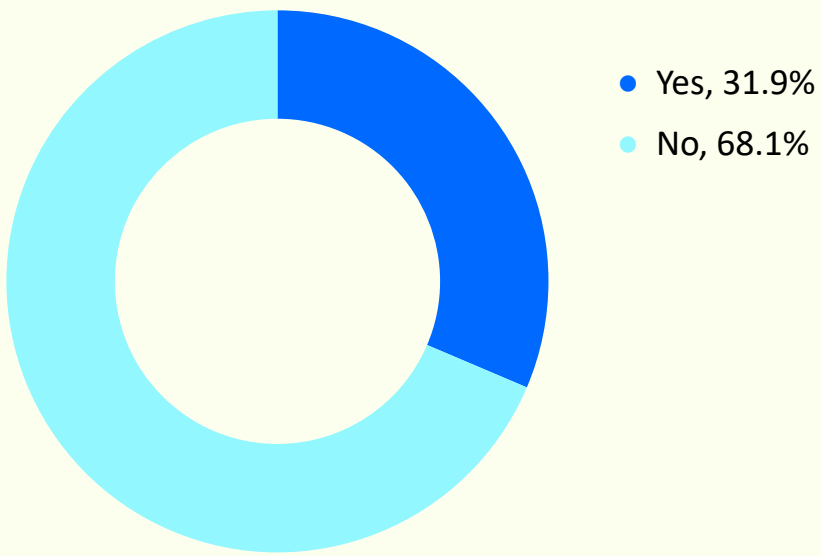


There is significant interest in Solo-Travel and Multi-Gen Travel

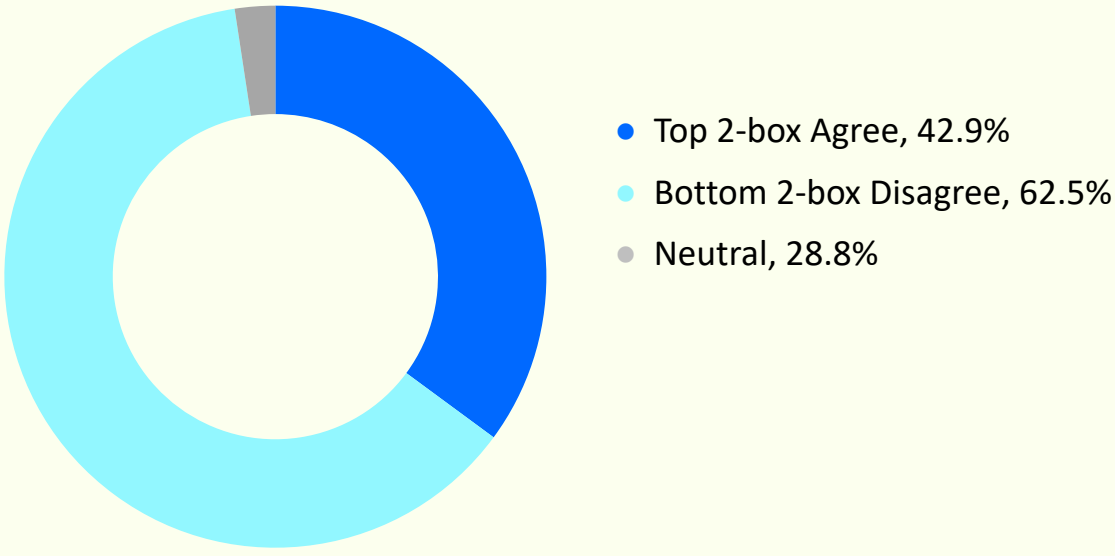
Question: Solo leisure travel is when someone goes on a leisure trip by themselves, without friends or companions. In the PAST 12 MONTHS, have you taken a solo leisure trip?

Question: I am interested in taking MULTI-GENERATIONAL TRIPS (i.e., travel with at least 3 generations of your family)

Solo Travel



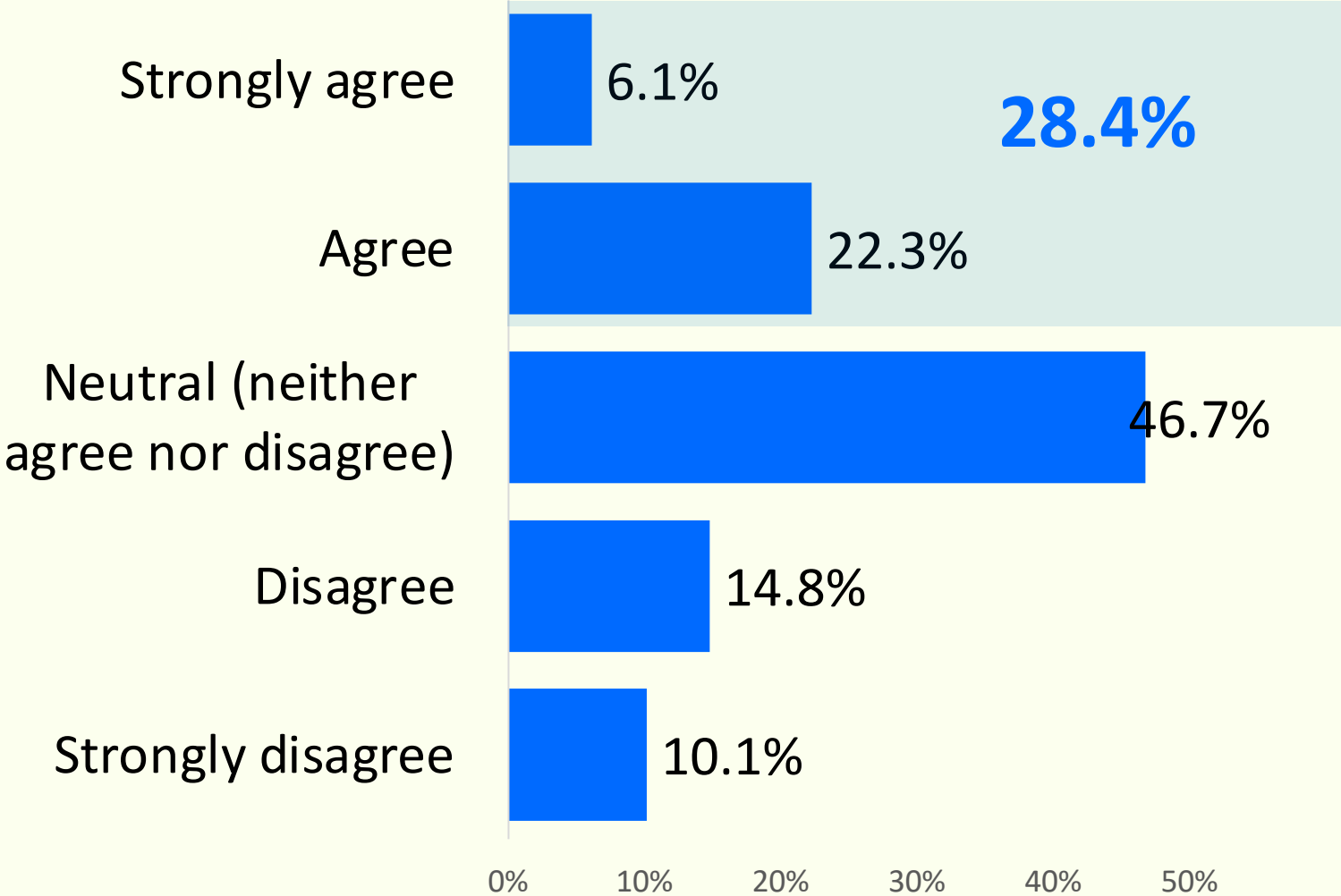
Multi-Gen Travel



28.4% of travelers agree that sustainability considerations are important to their decisions

Question:
How much do you agree or disagree with the following statements?
Environmental/sustainability considerations are important to how I select my travel destinations.

(Base: All respondents, 4,000 completed surveys.
Data collected February 14-23, 2025.)





Optimizing for Trends



A stressed-out nation?

Statement:

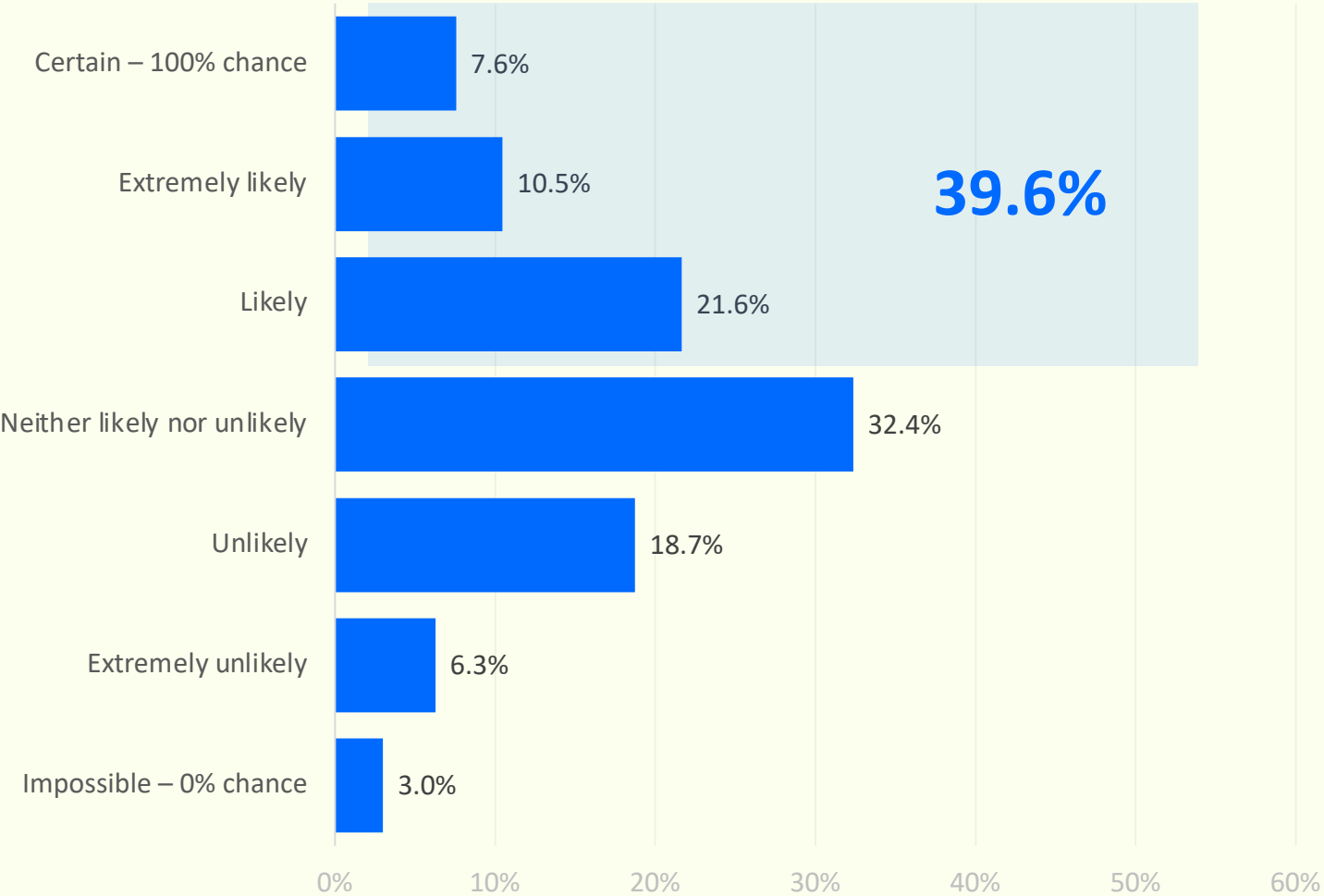
My overall stress levels will rise significantly.

Future Partners

Nearly 40% of American travelers expect this year to be one of rising personal stress levels.

Statement:

My overall stress levels will rise significantly.



Nearly a third of adults—32.8%—are running on empty, chronically sleep-deprived. Even more alarming, an estimated 50 to 70 million Americans battle sleep disorders or disruptions, turning restful nights into an elusive dream.

Slowcations



Sleepcations



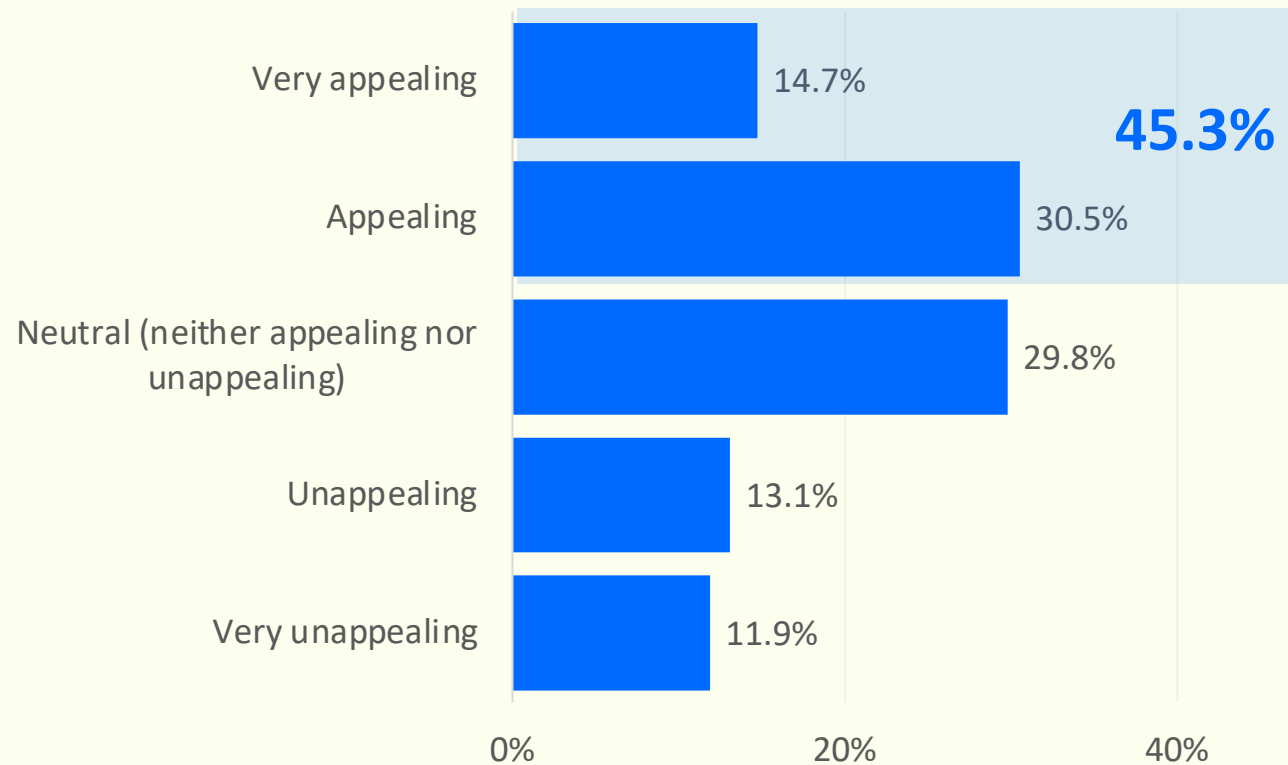
Sleep Tourism

**...trips focused on rest,
relaxation, and improving your
sleep in 2025**



Sleep travel appeals to a wide swath of the American traveling public.

Question: How appealing is the idea of trips focused on rest, relaxation, and improving your sleep in 2025?



Base: 2,170 American Travelers

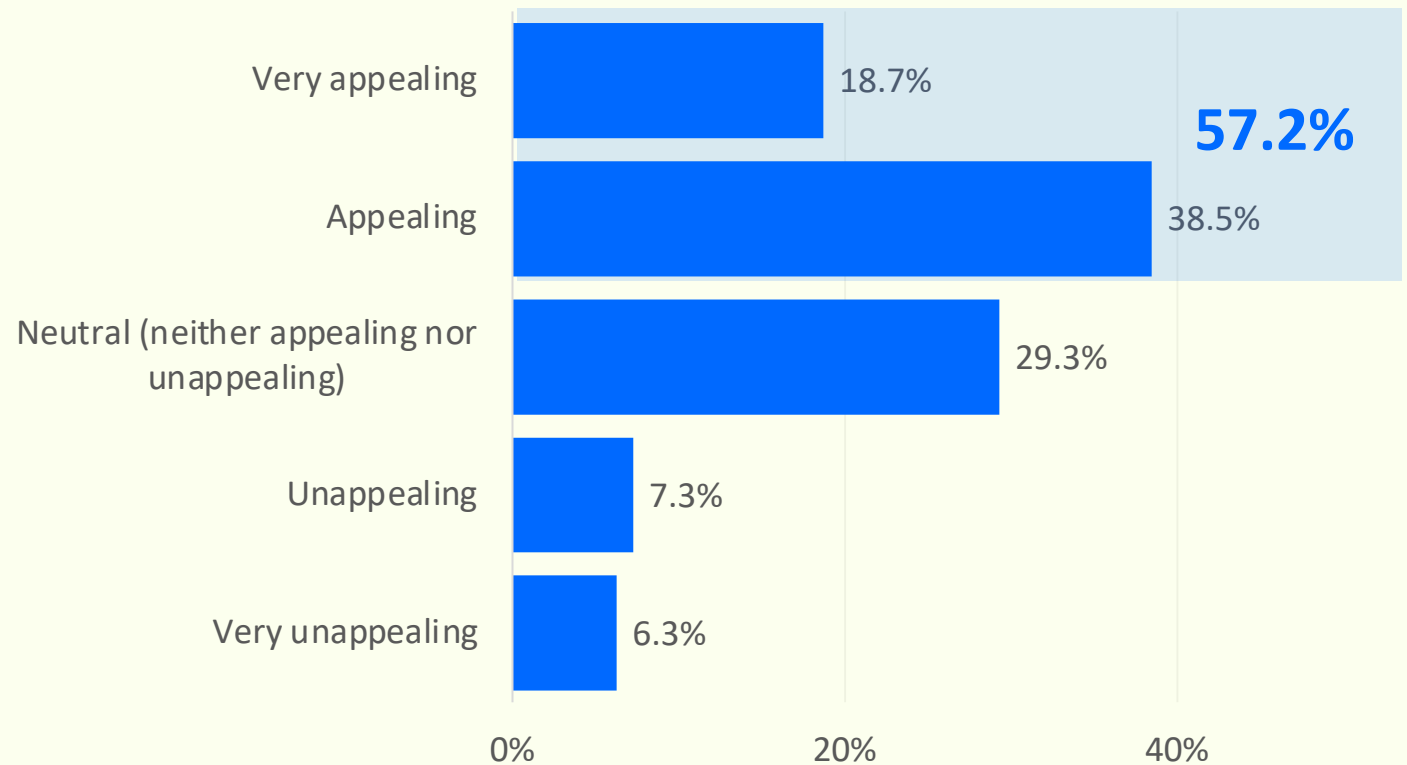
Slowcations

...leisurely and immersive travel, focusing on quality over quantity. It encourages deep connection with a destination by spending more time there, engaging with the local culture, environment, and community.



Slowcations is amongst the most popular trip concepts, with 57.2% saying it is appealing.

Question: How appealing is the idea of staying in one destination for an extended period to relax and immerse yourself in local culture in 2025?



Base: 2,170 American Travelers

Experiential Travel



Skillcations



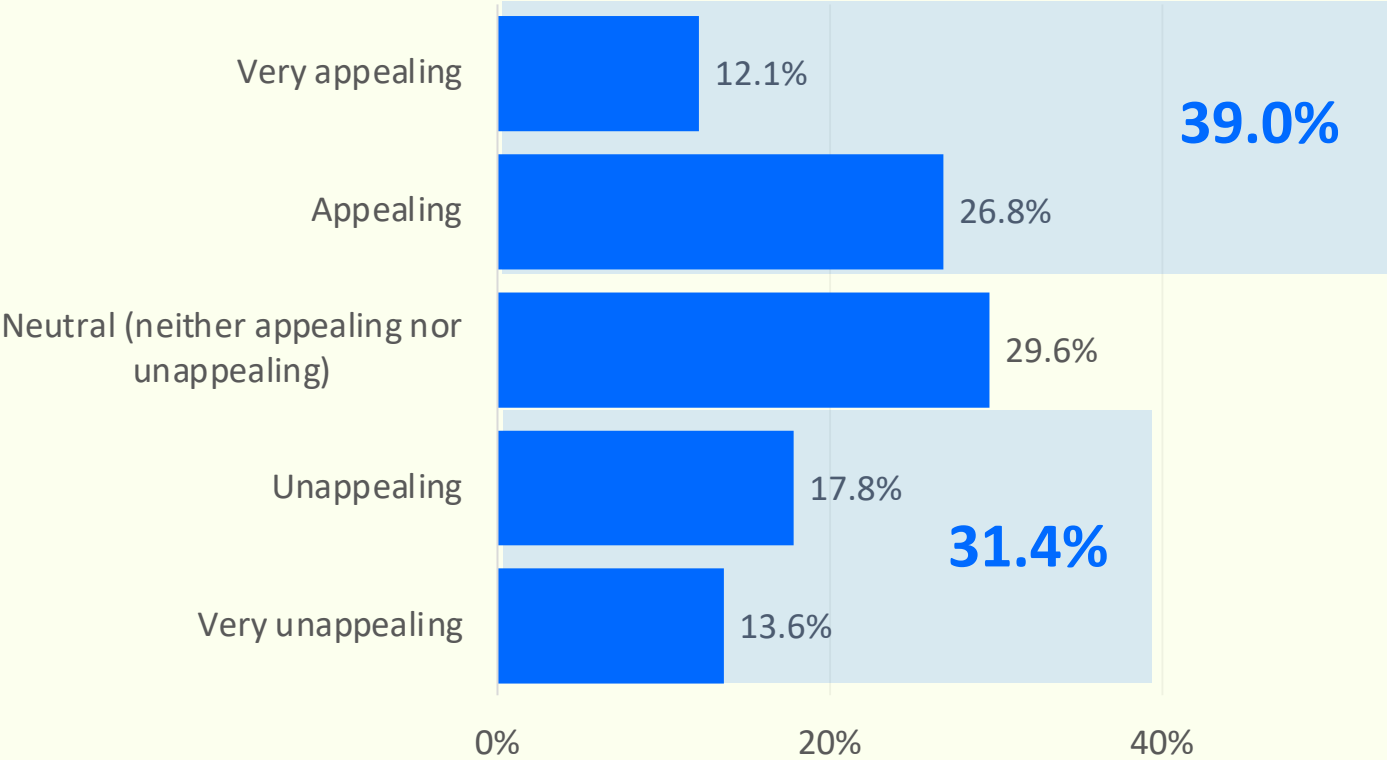
Skillcations

...a type of travel experience where individuals take a vacation to learn or improve a specific skill. Skillcations typically include hands-on workshops, classes, or immersive experiences in areas of the traveler's interest.



Skillcations definitely has an audience, with 4-in-10 travelers finding this travel appealing.

Question: How appealing to you is the idea of taking a skillcation in 2025?



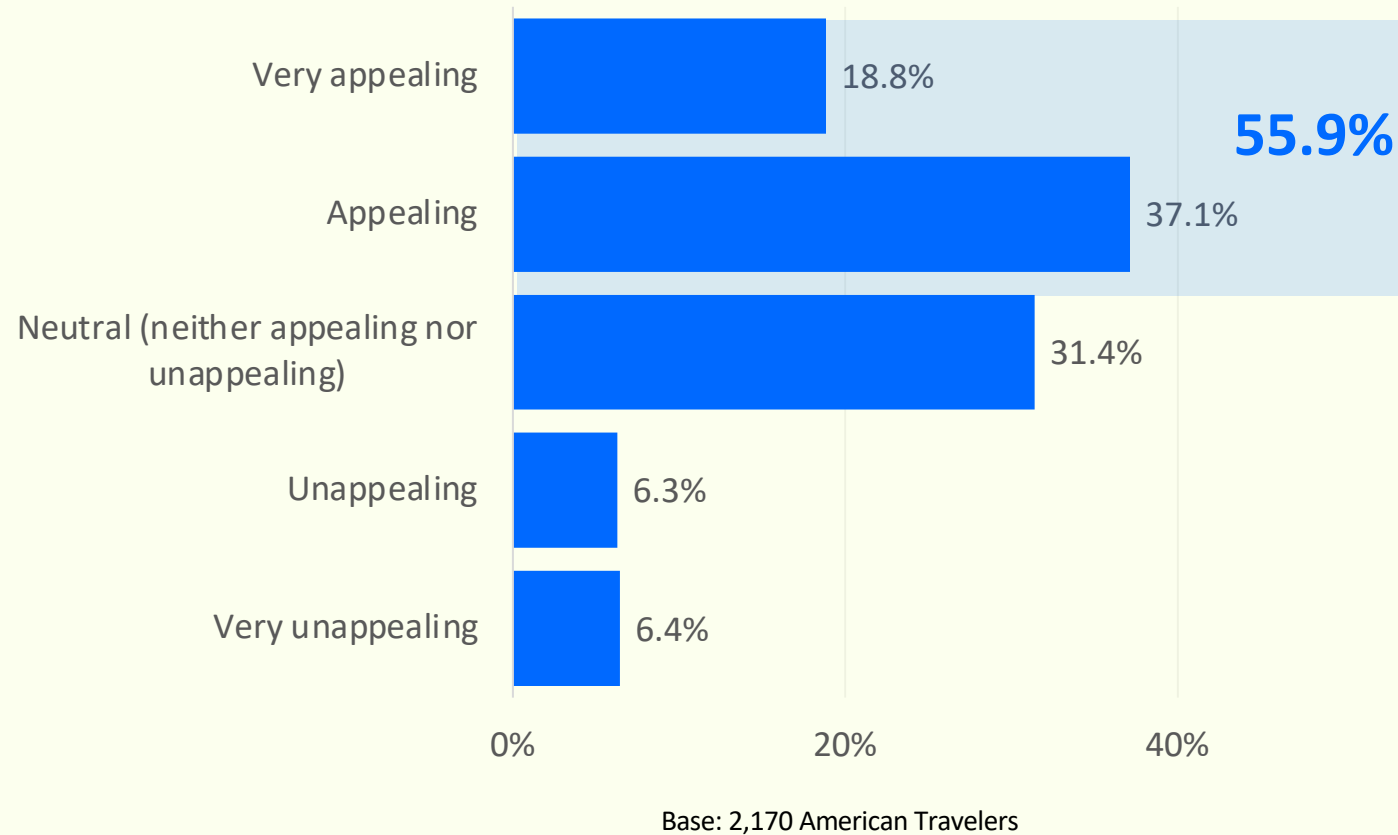
Base: 2,170 American Travelers



Experiential Travel

**...participating in immersive,
hands-on experiences that
connect you with a destination's
culture, history, or environment.**

Experiential travel appeals to 55.9% of travelers.



Question: How appealing is the idea of participating in immersive, hands-on experiences that connect you with a destination's culture, history, or environment in 2025?



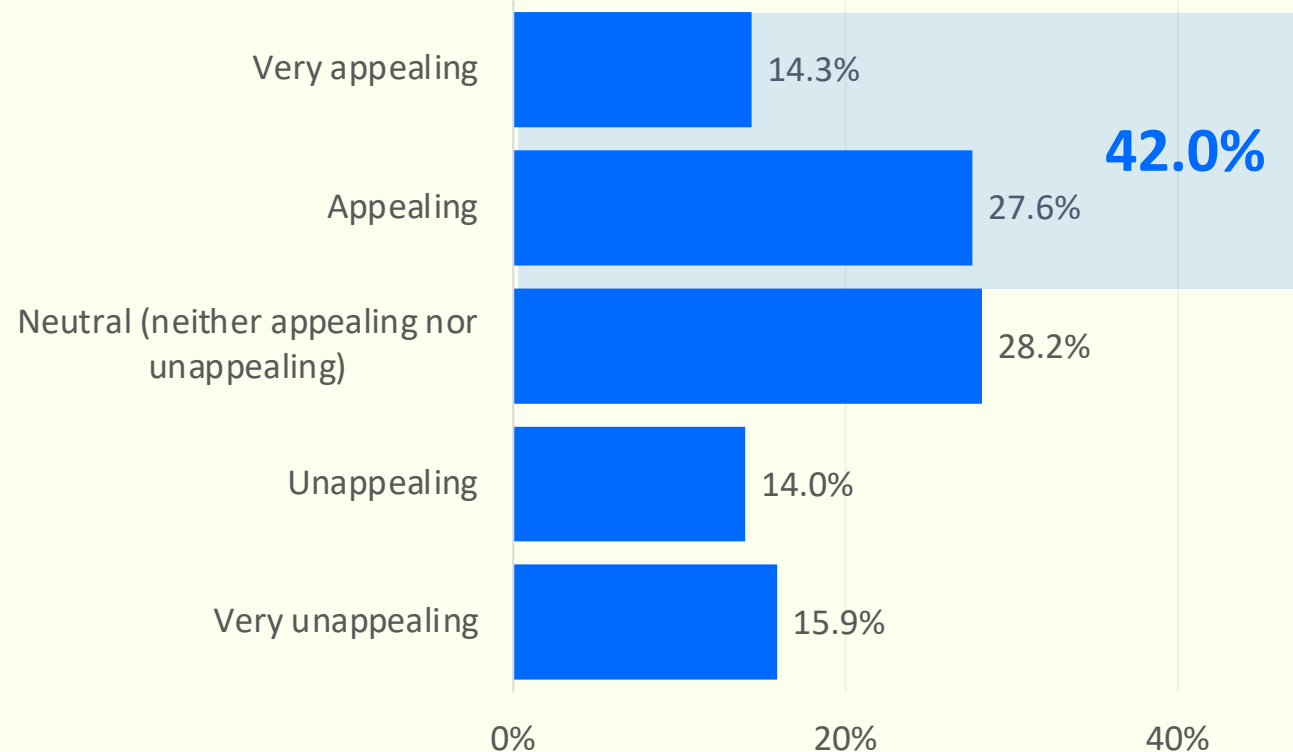
Gig-tripping

**...taking trips around major
concerts, music festivals.**



Gig-tripping appeals to 42.0% of American travelers

Question: How appealing is the idea of taking trips around major concerts, music festivals, or other live events in 2025?



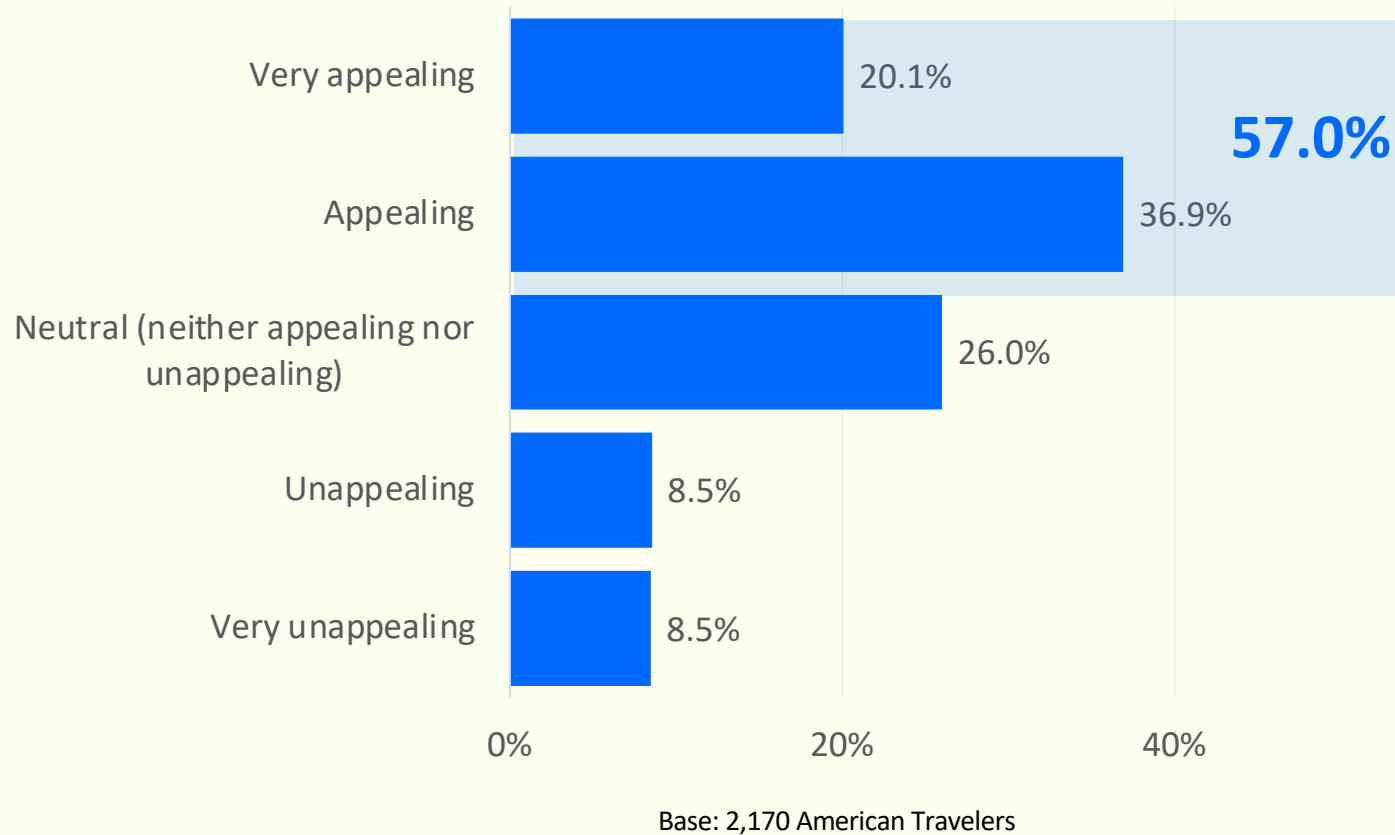
Base: 2,170 American Travelers



Foodie Trips

**...traveling to explore
destinations known for their
food and drink experiences.**

Foodie trips is one of the most popular trip types.



Question: How appealing is the idea of taking trips around major concerts, music festivals, or other live events in 2025?

Where Travelers Want to Go



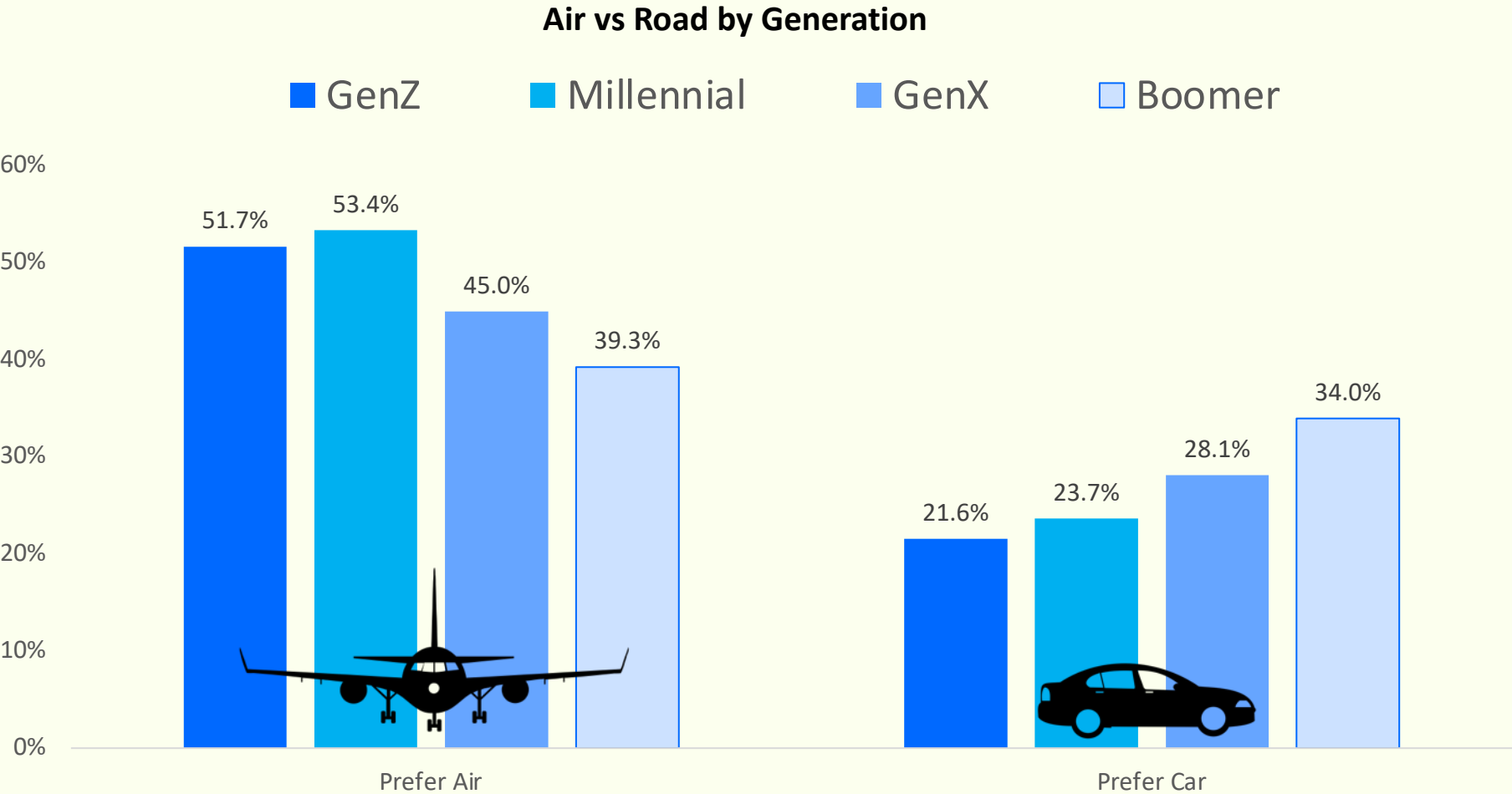
Preference for Air vs Car: Younger travelers want to fly

Question:

Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)?

When it comes to road trips vs. air travel, I

Base: All respondents, 2,000 completed surveys

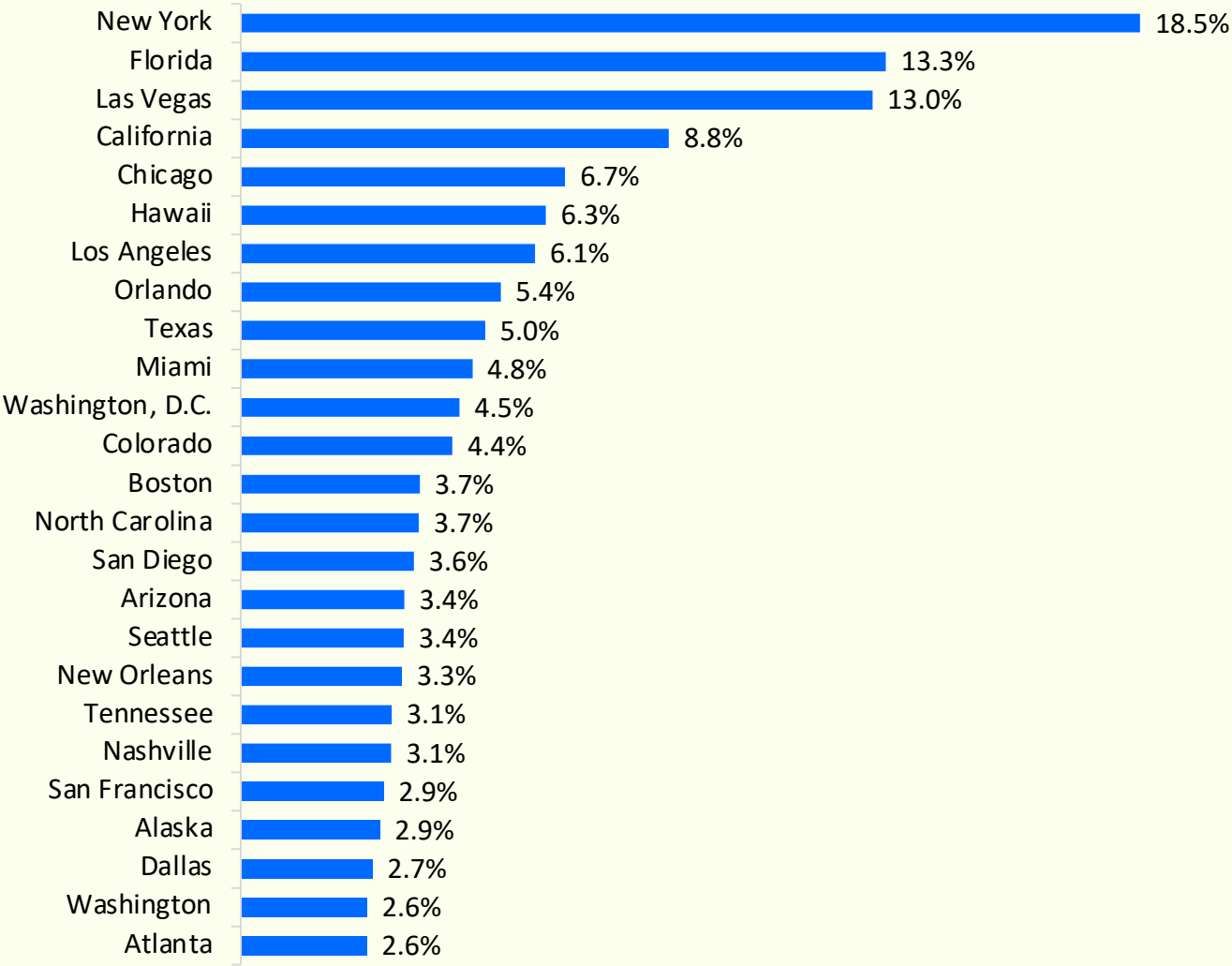


New York, Florida, Las Vegas and California top American travelers lists of most desired domestic destinations

Question:

Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

Base: All respondents, 4,000 completed surveys

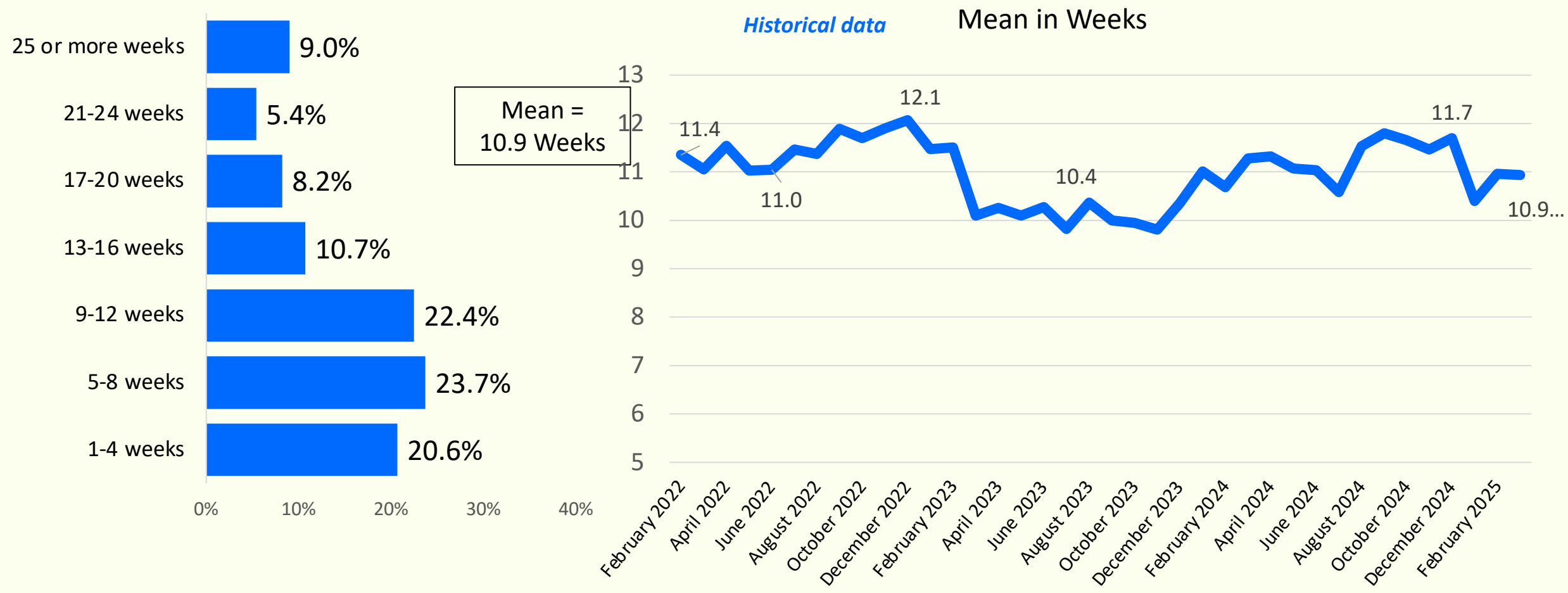




Reaching Travelers

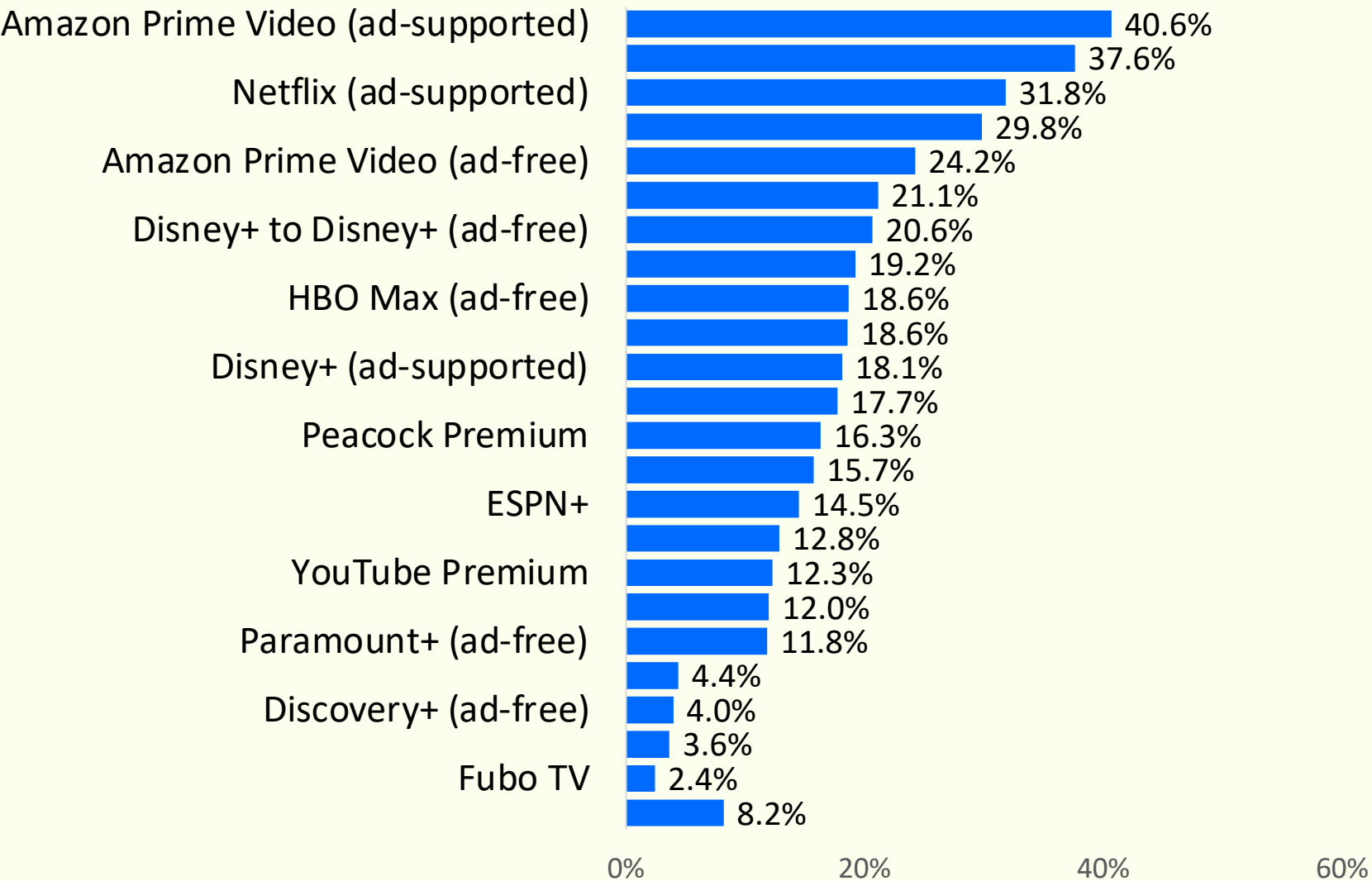
The average planning window for a domestic vacation is 10.9 weeks

Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



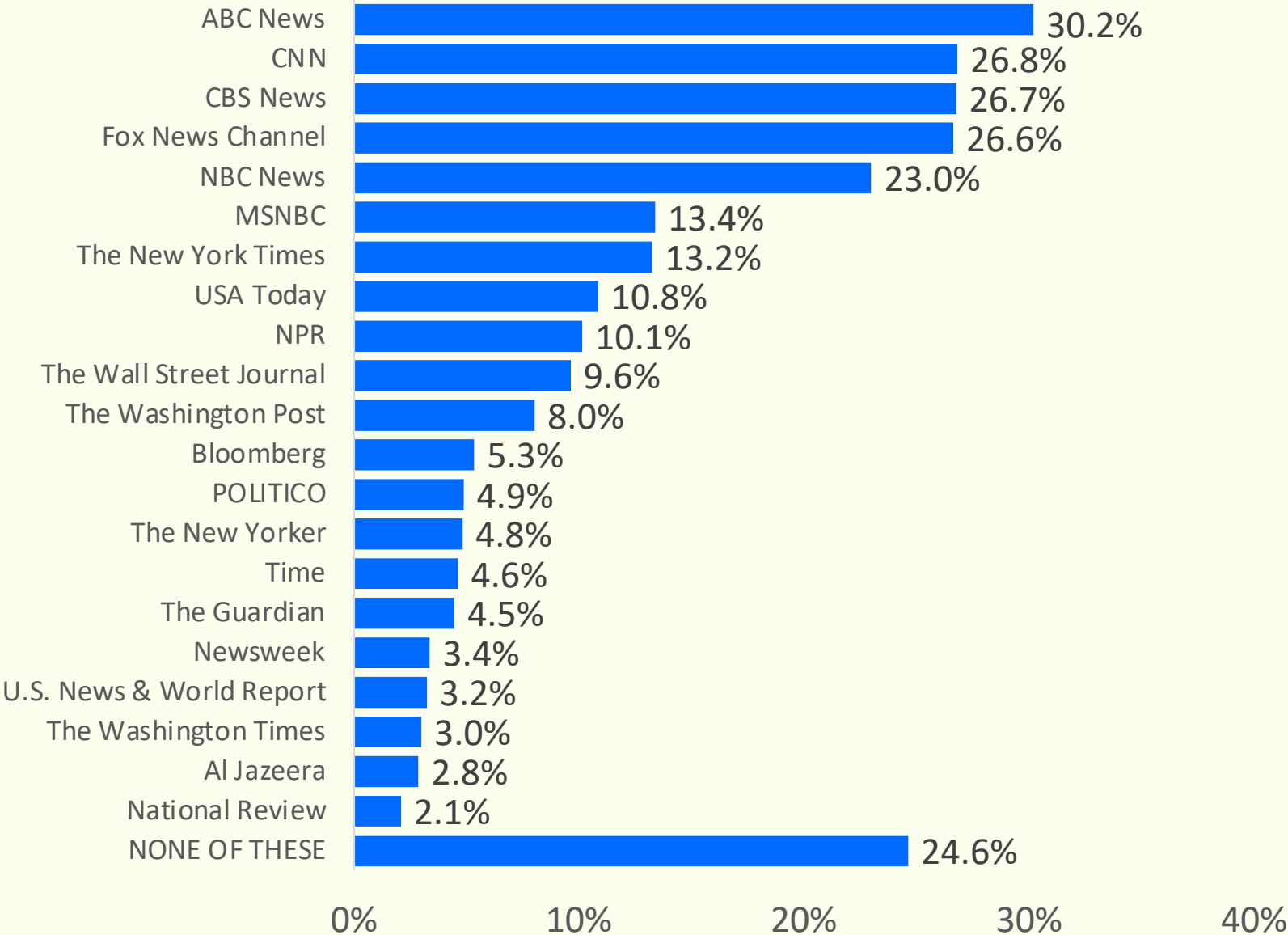
Streaming Service Usage

Question:
To which of these streaming services do you currently subscribe or regularly watch? (Select all that apply)



News Sources Used on a Regular Basis

Question:
Which of these news sources do you use on a regular basis? (Select all they apply)



The most read magazine by generation of American traveler:

Gen Z



Millennials



Generation X

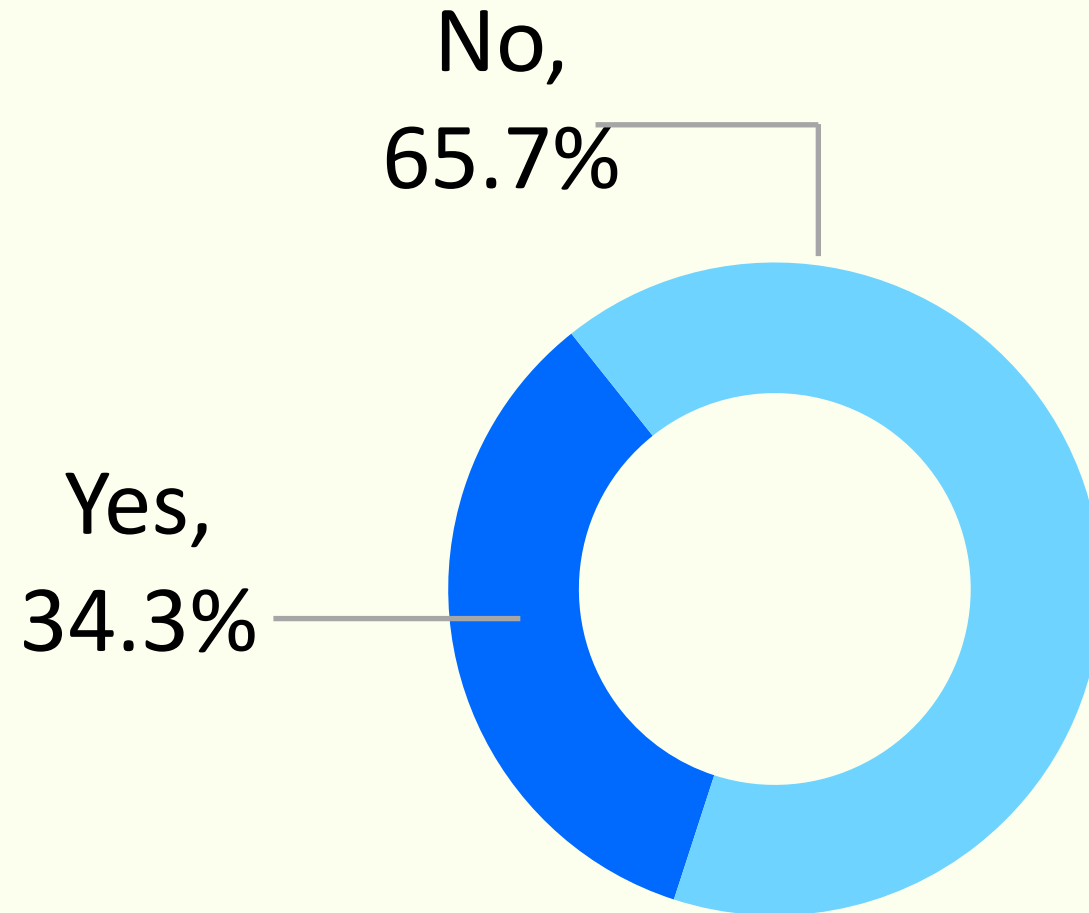


Baby Boomers



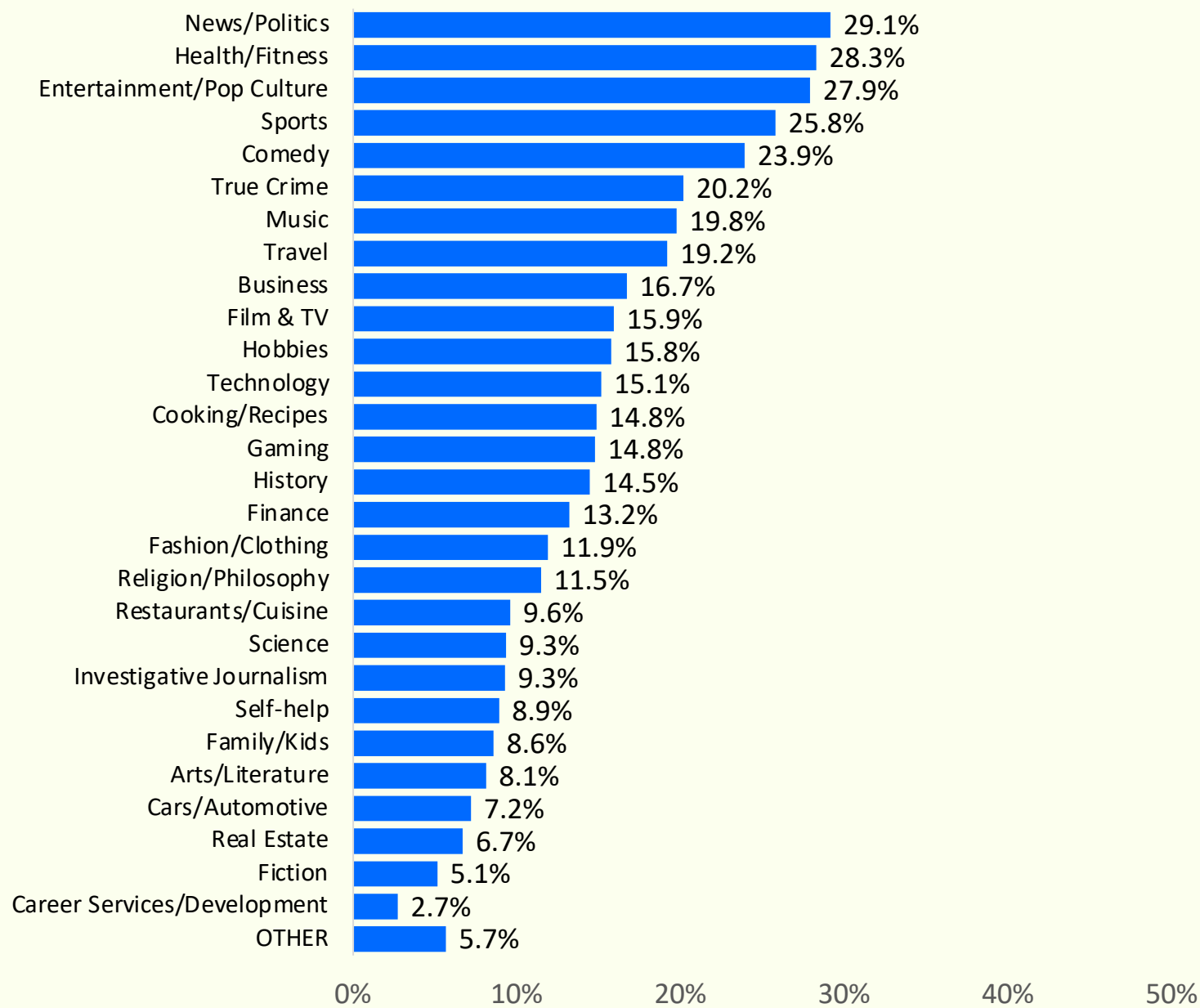
Podcast Usage

Question: Do you listen to any podcasts on a regular basis?



Podcast Genres

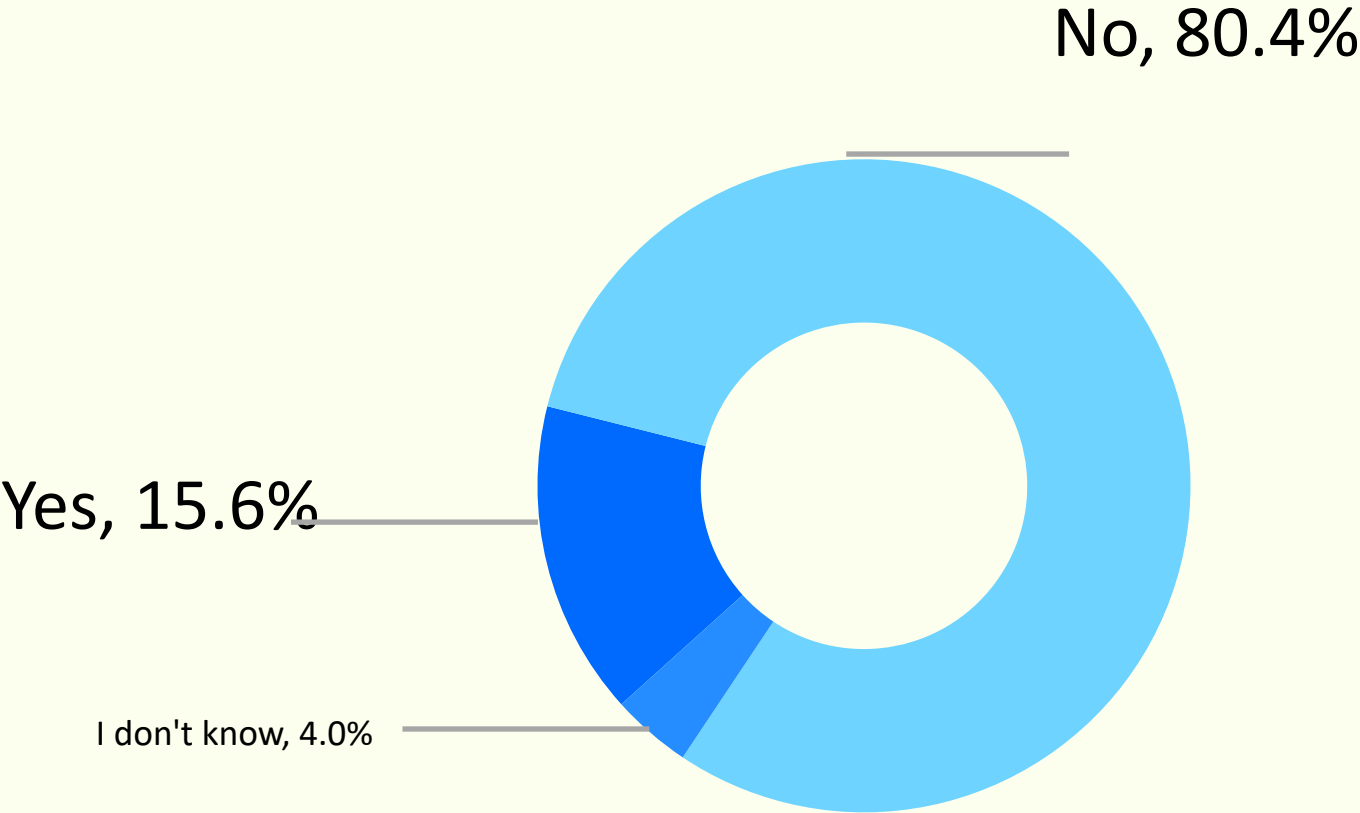
Question: What podcast genres do you listen to on a regular basis? (Select all that apply)



Used AI Tools to Help Plan Trips in the Past 12 Months

Question:

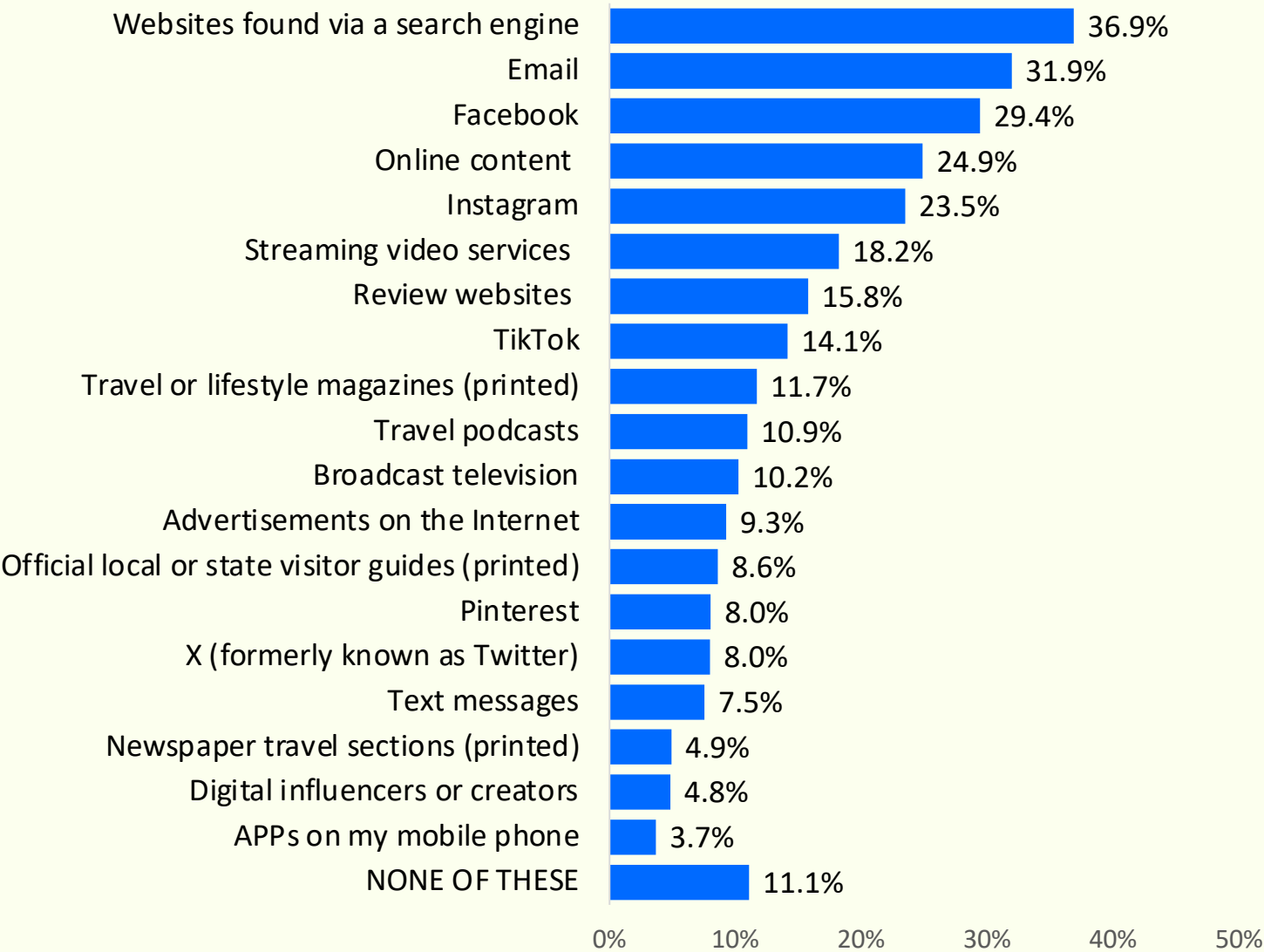
In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Destination Inspiration Sources

Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

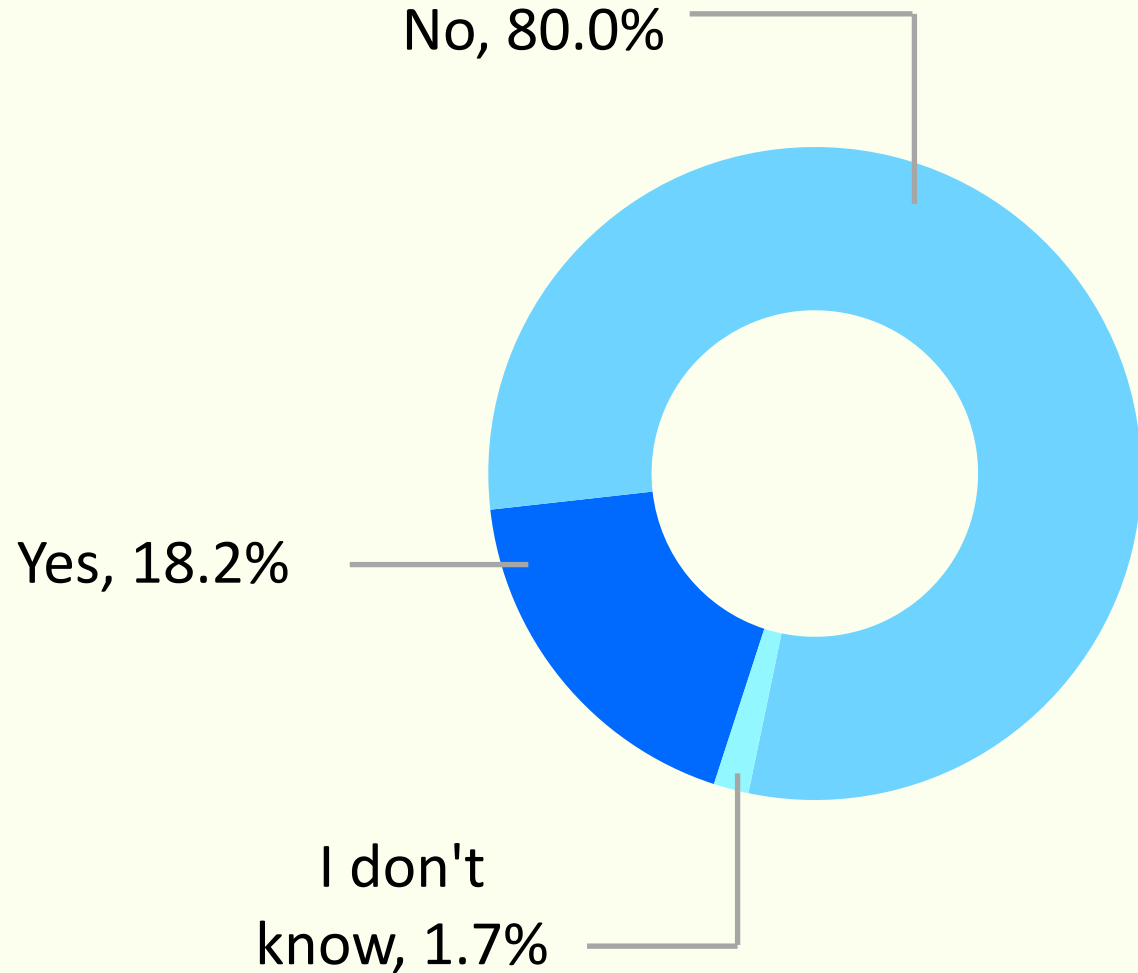


More than 18% of American Travelers used a Travel Advisors in the past 12 months

Question:

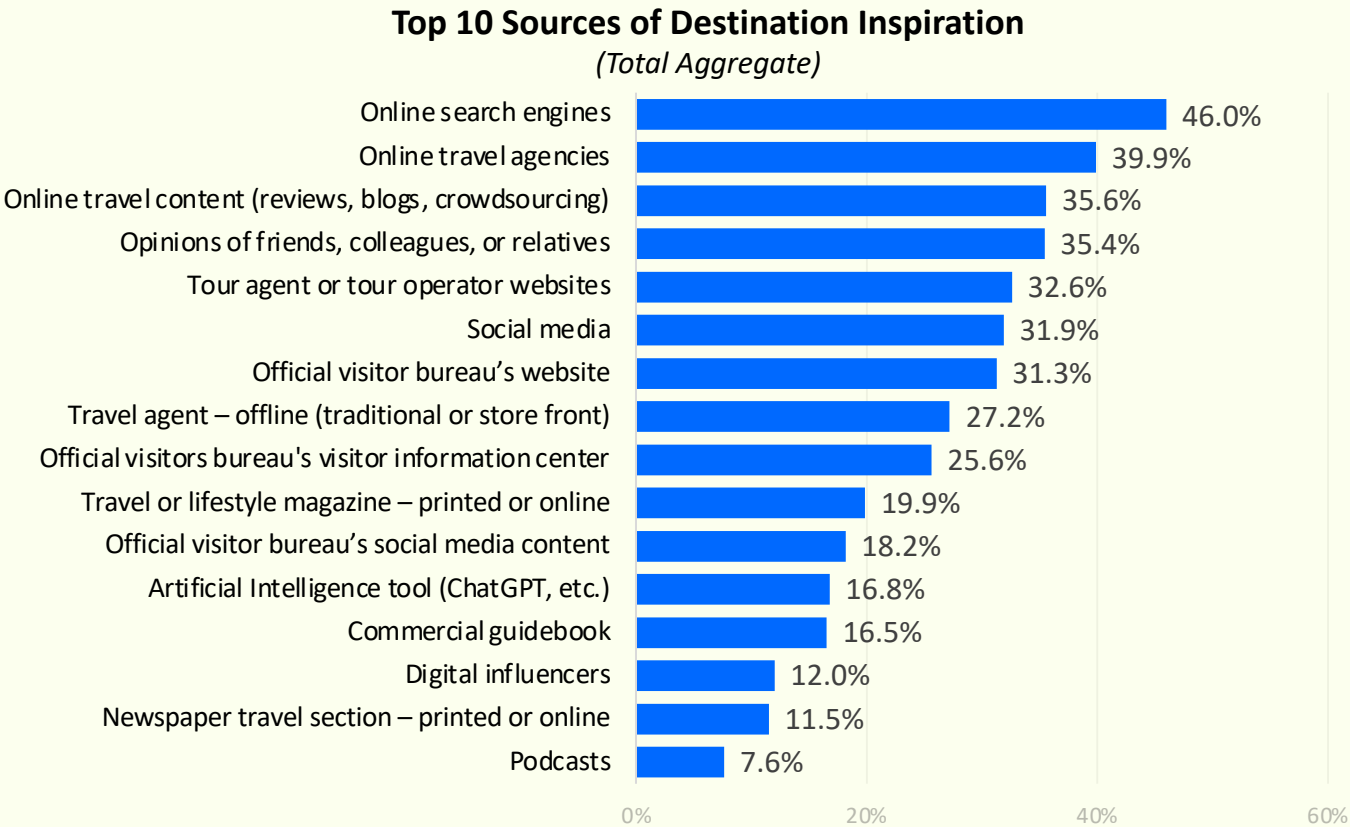
In the past 12 months, have you used a TRAVEL AGENT or TRAVEL ADVISOR to help plan any travel? (Please include only human agents or advisors, not online travel agencies where you have no human contact)

(Base: All respondents, 4,000 completed surveys. Data collected February 14-23, 2025.)



Marketing Considerations: Deciding Where To Go – Destination Inspiration Sources

Online search outperforms other resources as the **top go-to destination inspiration source**, led APAC and Canada markets.



Online Media vs. Word-of-Mouth Preference – By Market

	Online Search	Word-of-Mouth (WOM)	Difference: Online over WOM
Japan	50.5%	24.2%	+26.3pp
South Korea	55.5%	37.8%	+17.7pp
Australia	57.8%	41.0%	+16.8pp
India	59.5%	43.0%	+16.5pp
Italy	43.4%	28.0%	+15.4pp
Netherlands	43.8%	28.8%	+14.9pp
Canada	56.0%	42.8%	+13.2pp
United Kingdom	50.2%	37.6%	+12.6pp
Germany	45.3%	33.3%	+12.0pp
Brazil	46.5%	37.1%	+9.5pp
France	36.7%	30.4%	+6.3pp
Mexico	36.2%	31.8%	+4.5pp
China	35.3%	33.5%	+1.8pp
Colombia	40.5%	39.4%	+1.1pp
Spain	36.5%	36.1%	+0.4pp
Argentina	41.7%	42.1%	-0.4pp

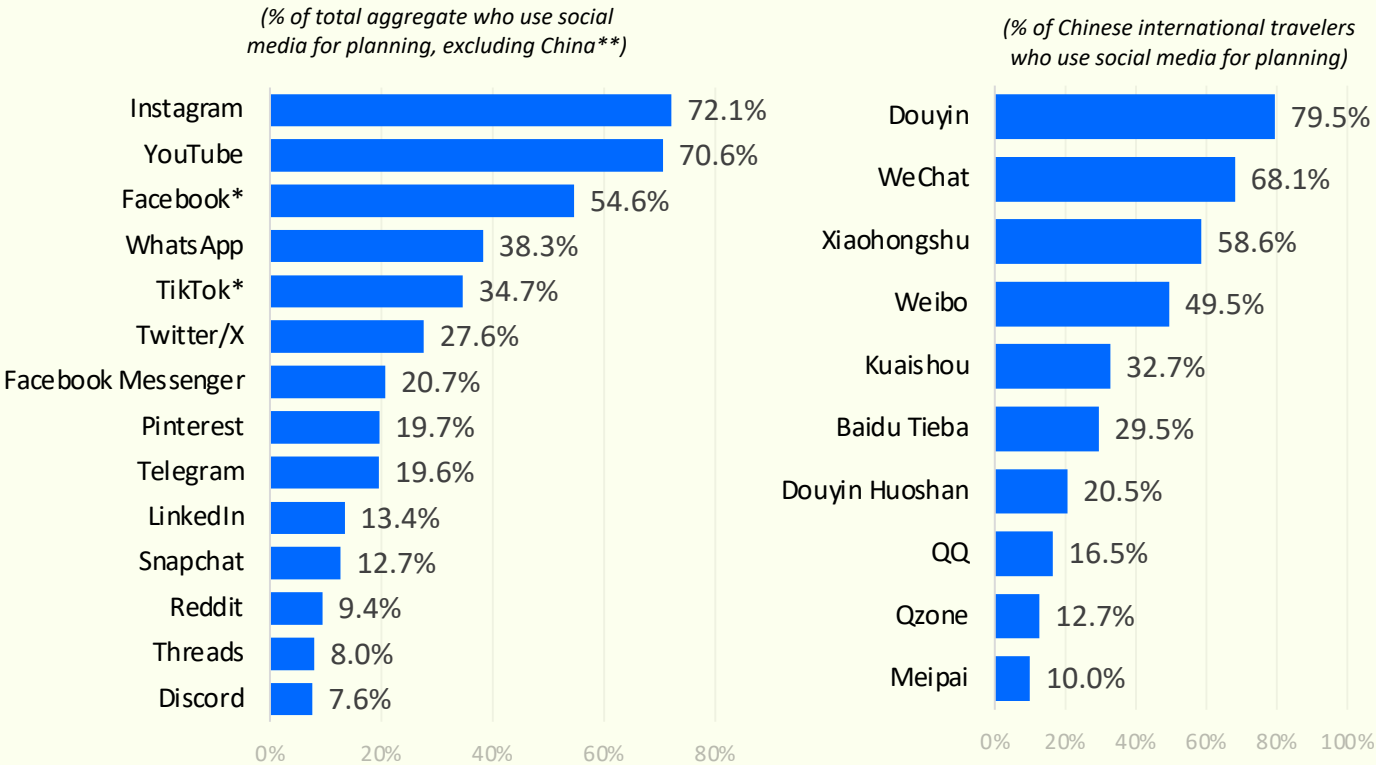
Marketing Considerations: The Role of Social Media – Planning

Over **three in ten** global travelers say that they use social media for planning international trips; **Instagram** and **YouTube** lead.

Use of Social Media – By Market
(% who would use this for planning)

India	56.8%
Mexico	45.5%
China	44.8%
Brazil	43.0%
South Korea	39.0%
Argentina	37.2%
Colombia	35.3%
Japan	30.5%
Australia	26.7%
Italy	25.8%
Spain	24.6%
United Kingdom	22.3%
Canada	21.3%
Germany	20.6%
France	19.0%
Netherlands	17.6%

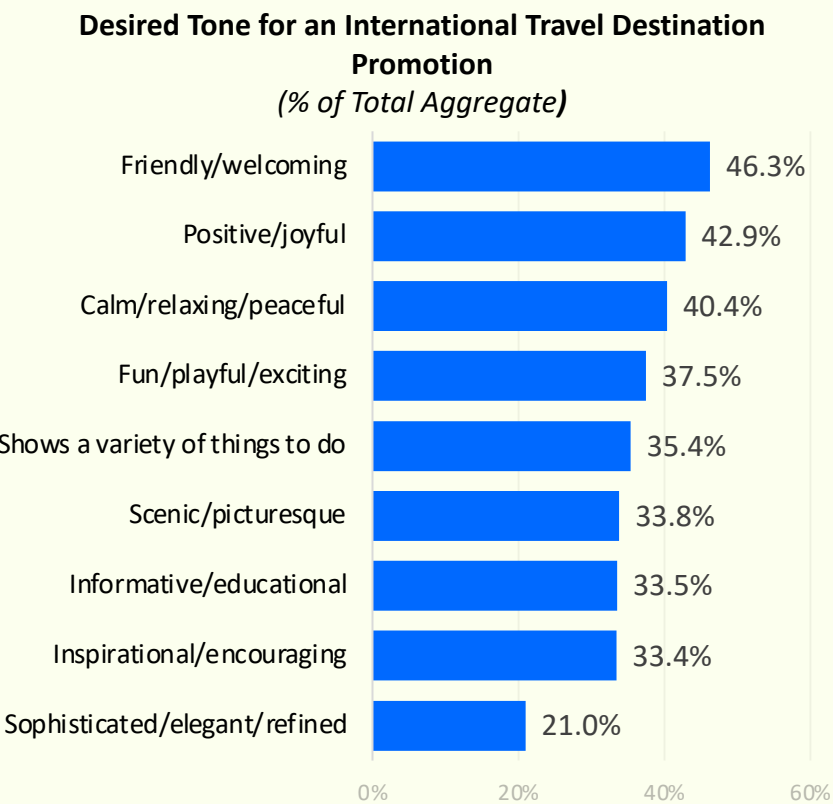
Social Media Channels Used for International Leisure Trip Planning



*At the time of fielding, Facebook was banned in Brazil and TikTok was banned in India
**Chinese respondents were shown a different set of social channels due to differences in available platforms

Marketing Considerations: Desired Tone for International Destination Ads

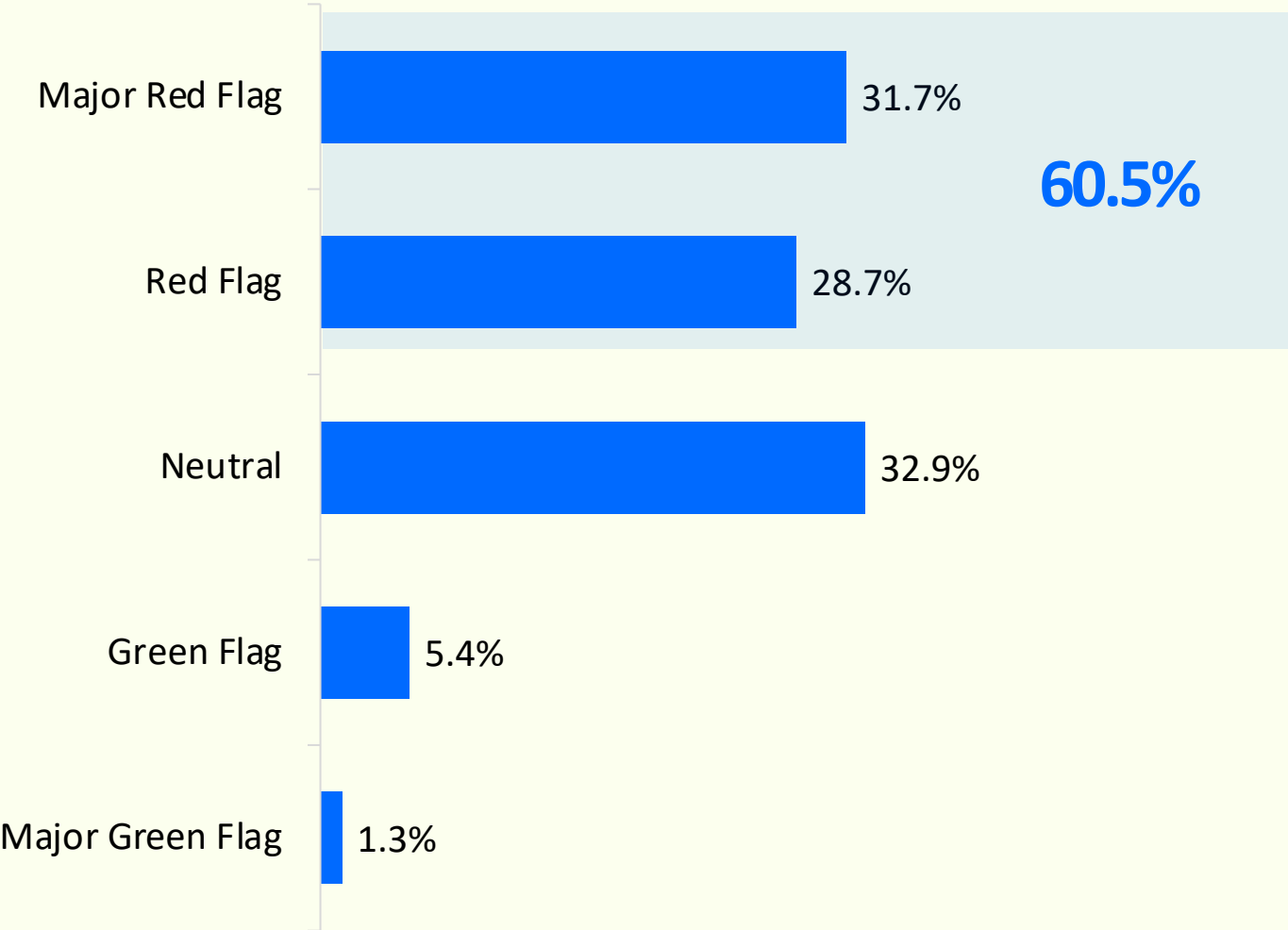
Welcoming, positive, and calm tones ranked highest among global travelers for what they seek in an international destination ad.



Cue the Cringe—AI-Generated Imagery Doesn't Sit Well

Situation:

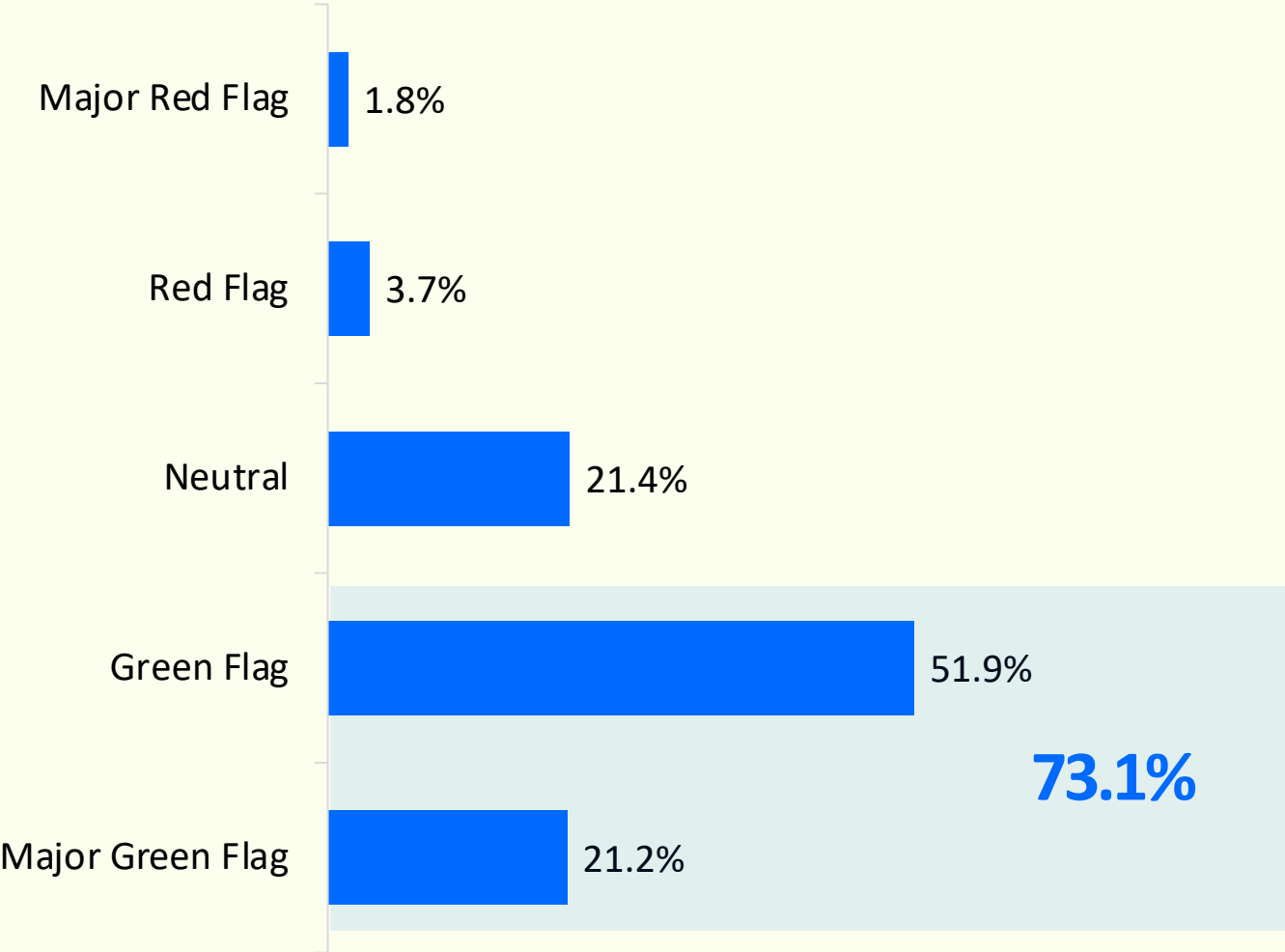
Promotional photos of the destination are Artificial Intelligence (AI) generated.

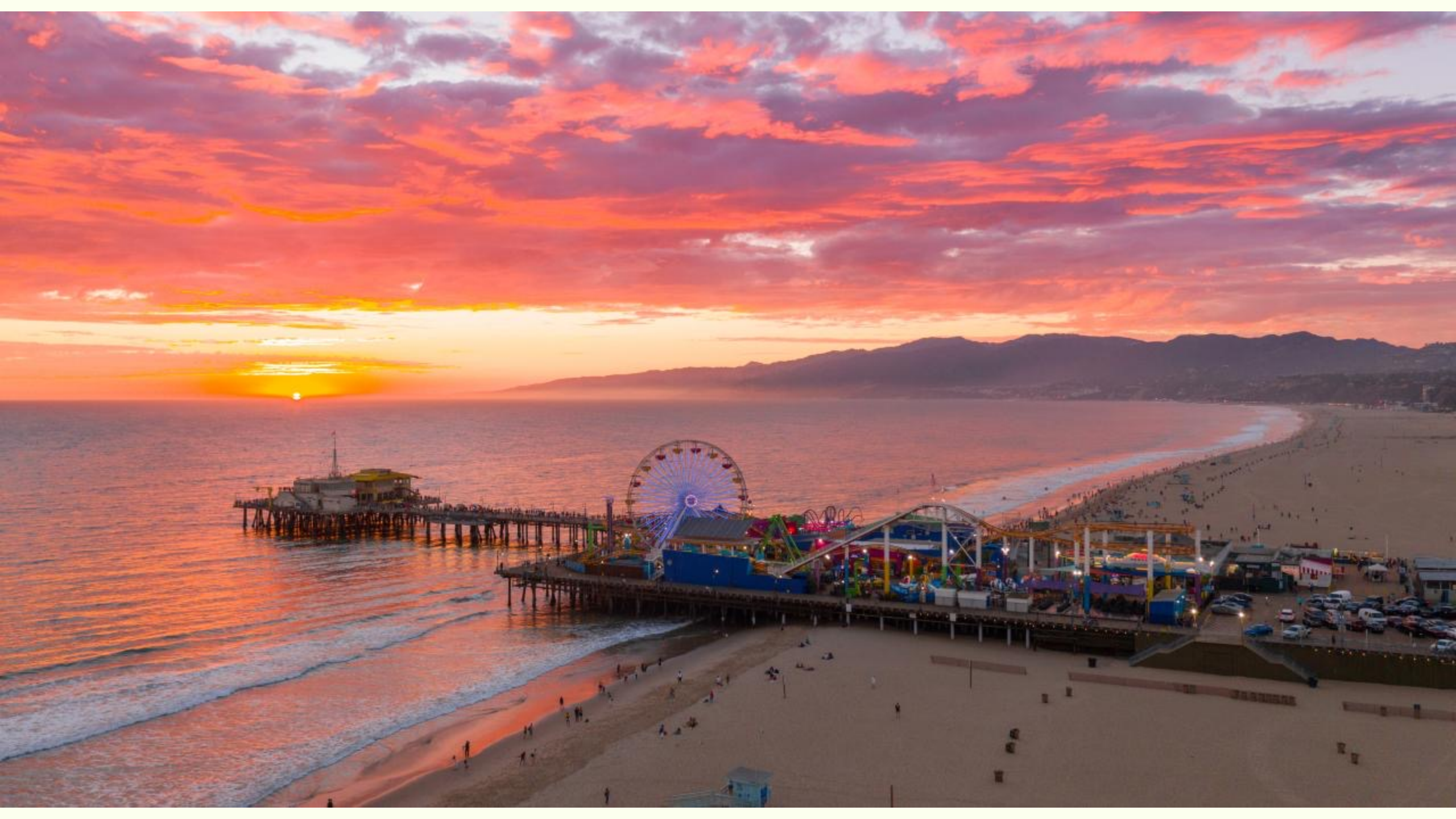


Green Flags Galore—Travelers Are Into Hidden Gems

Situation:

This destination is described as a hidden gem.





Destination Perceptions -

Destination vs. Competitive Set

Year

2025 YTD

Destination Type

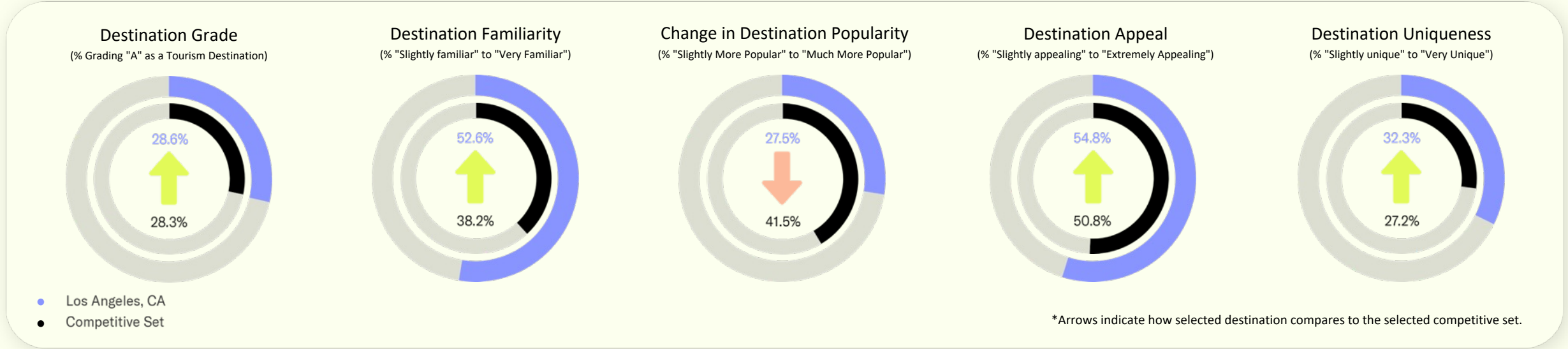
Cities

Destination

Los Angeles, CA

Competitive Set

(All)



Media Recall - Destination vs. Competitive Set

Year

2025 YTD

Destination Type

Cities

Destination

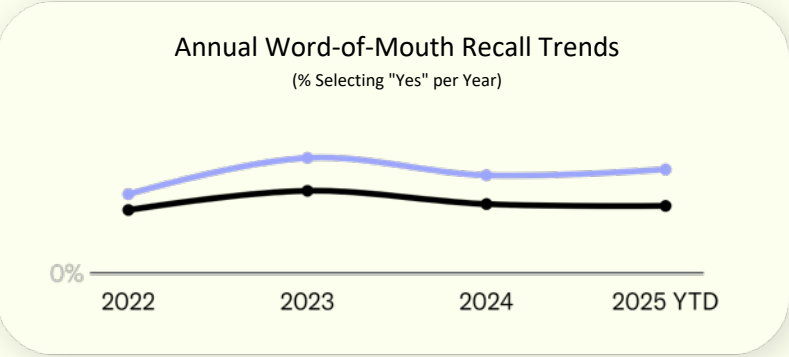
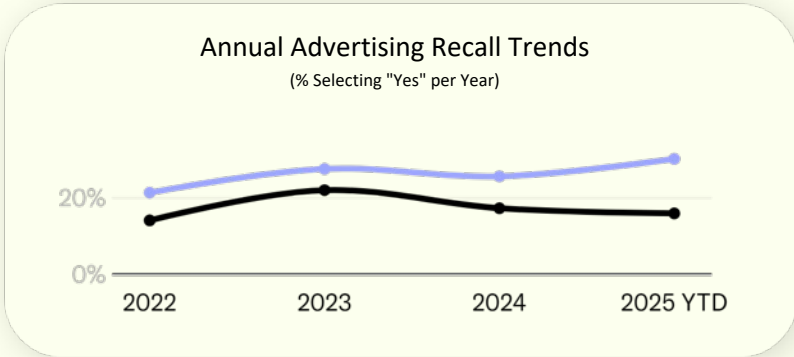
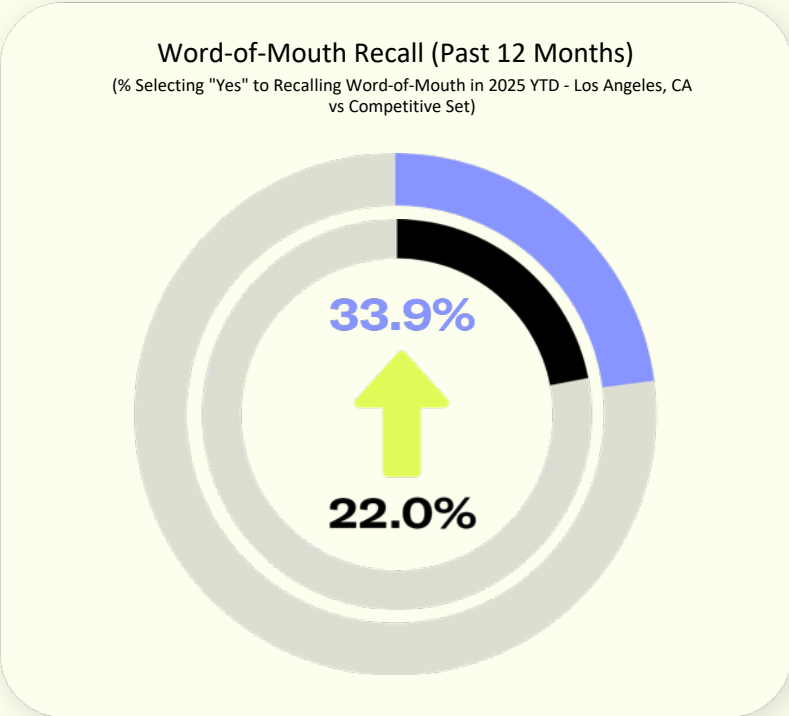
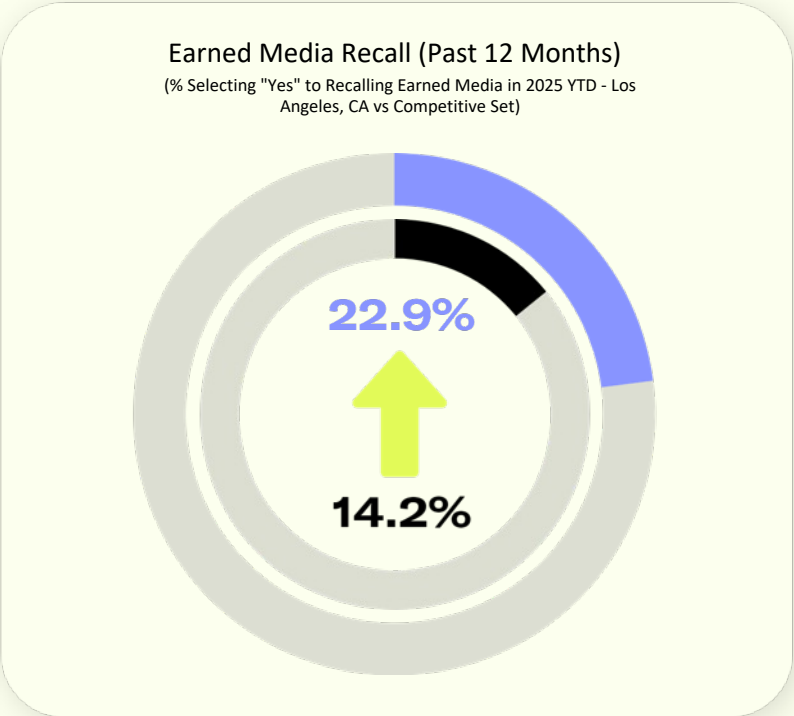
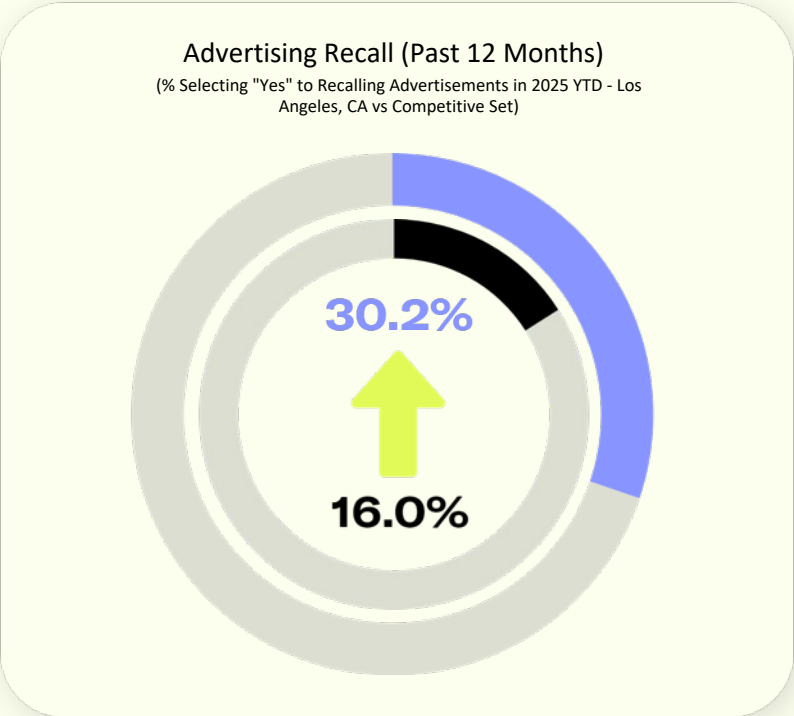
Los Angeles, CA

Competitive Set

(All)

● Los Angeles, CA

● Competitive Set



Marketing Metrics

Likely Visitors to Los Angeles, CA (Next 12 Months)

Year

2025 YTD

Insights Explorer

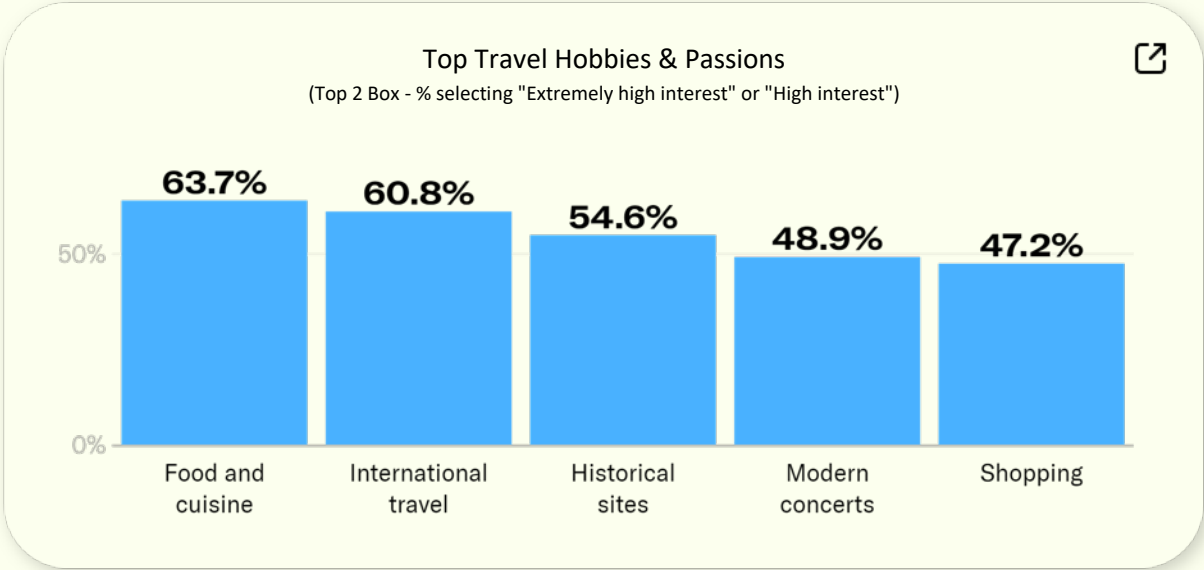
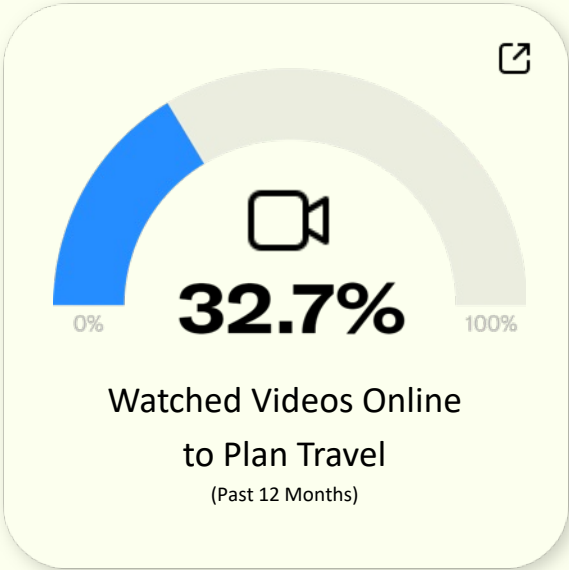
Cities

Filters

Los Angeles, CA

(All)

Likely Visitors



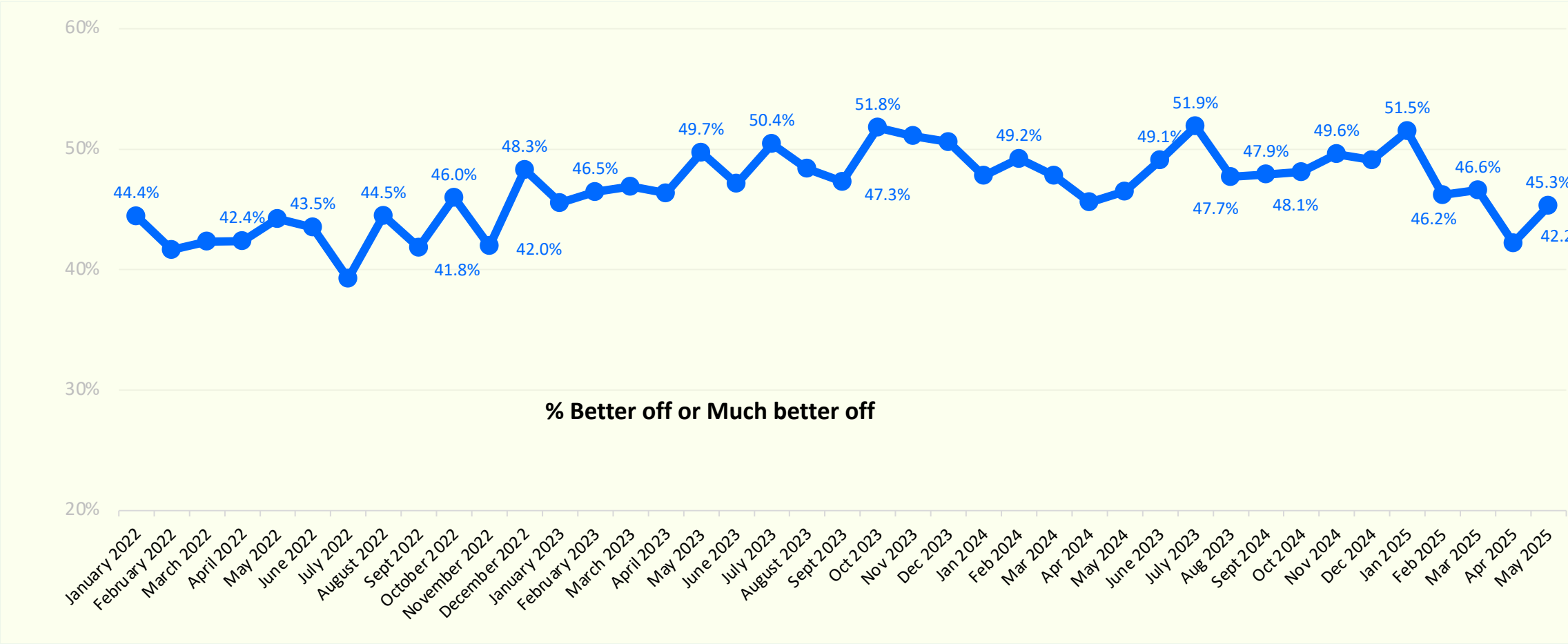


SMILE 😊



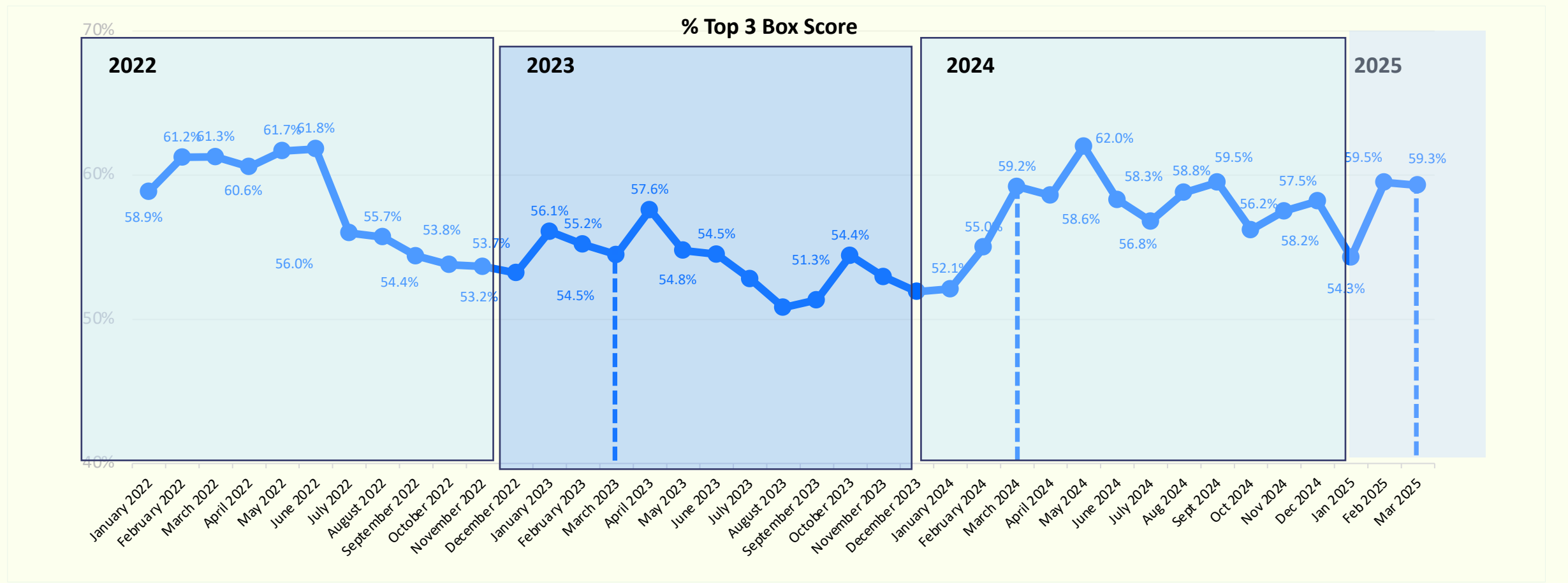
Travelers Report Improved Confidence in Their Financial Future

Question: 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?



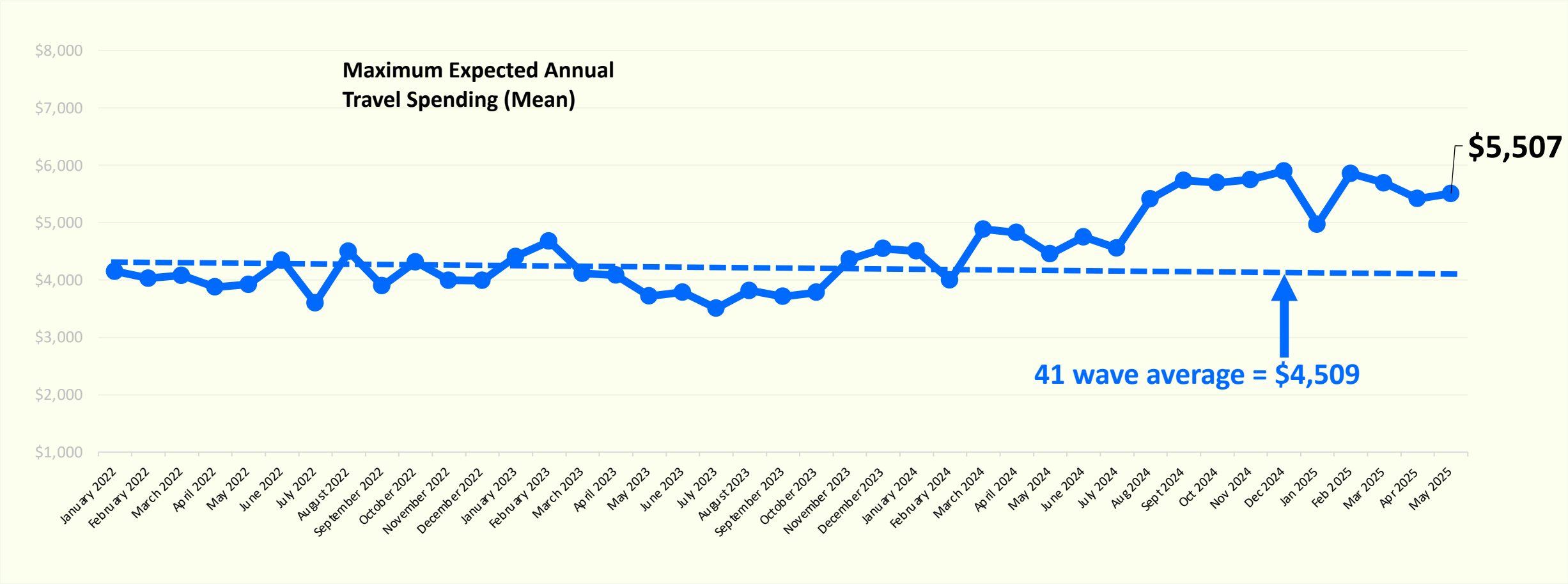
Americans’ intent to make travel a budget priority in the near-term future remains at high levels

Question:
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.



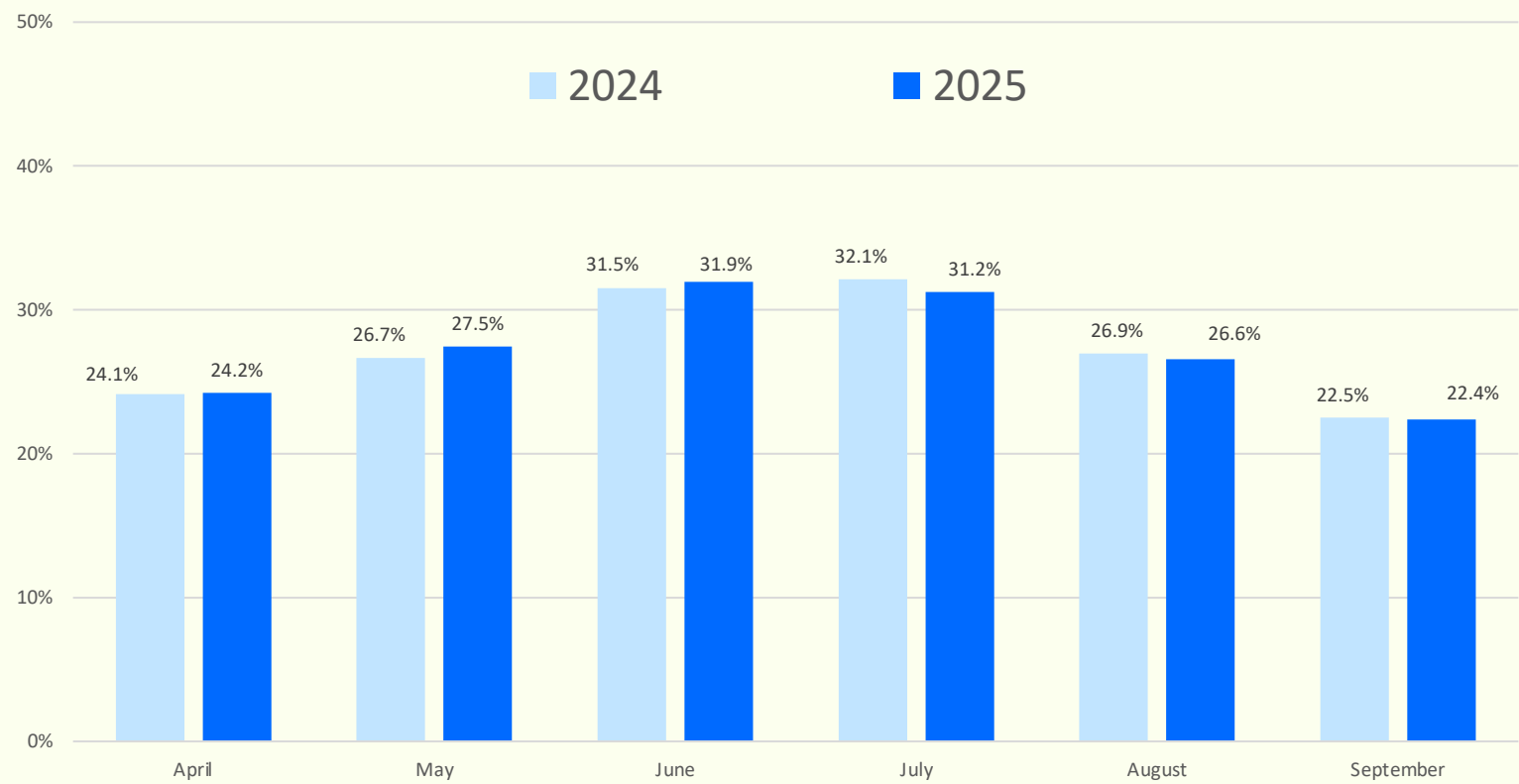
Projected Travel Budgets Remain Strong with Modest Recent Growth

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



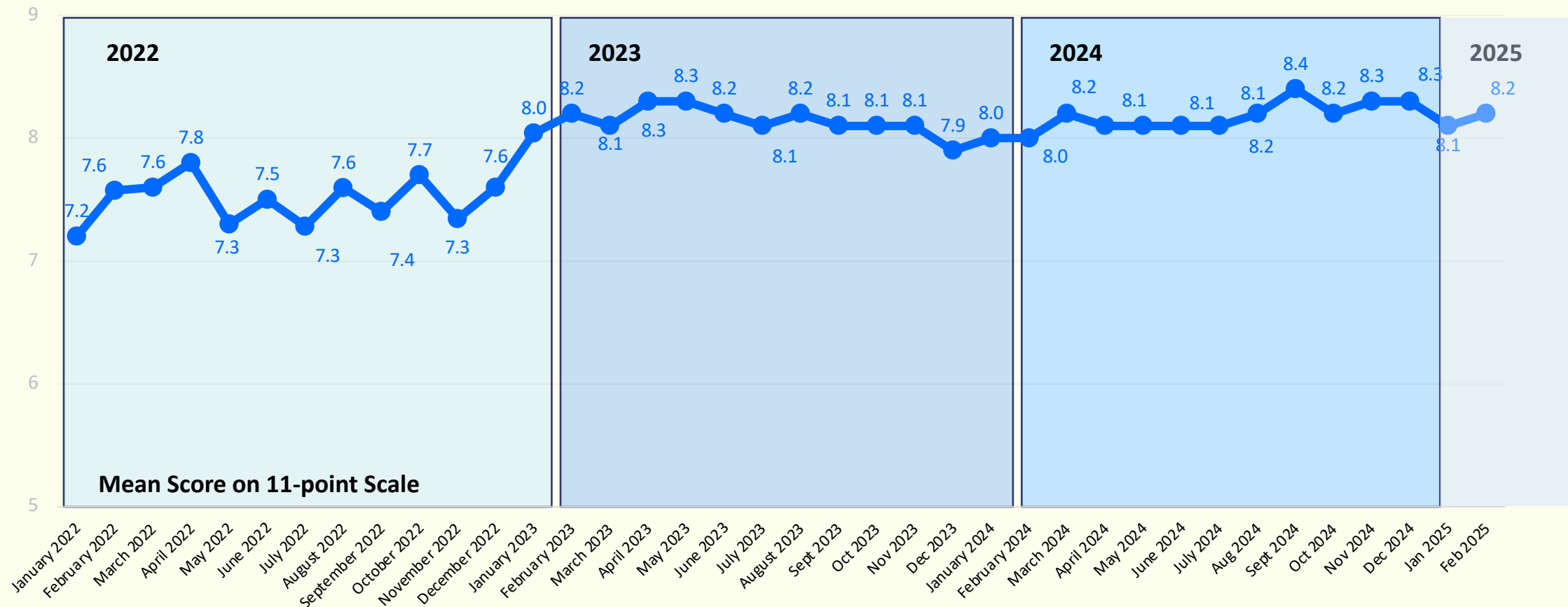
Expected near-term travel appears to be holding the line with last year's performance.

Question: In which months do you currently have any leisure trips planned (even if only tentatively)?



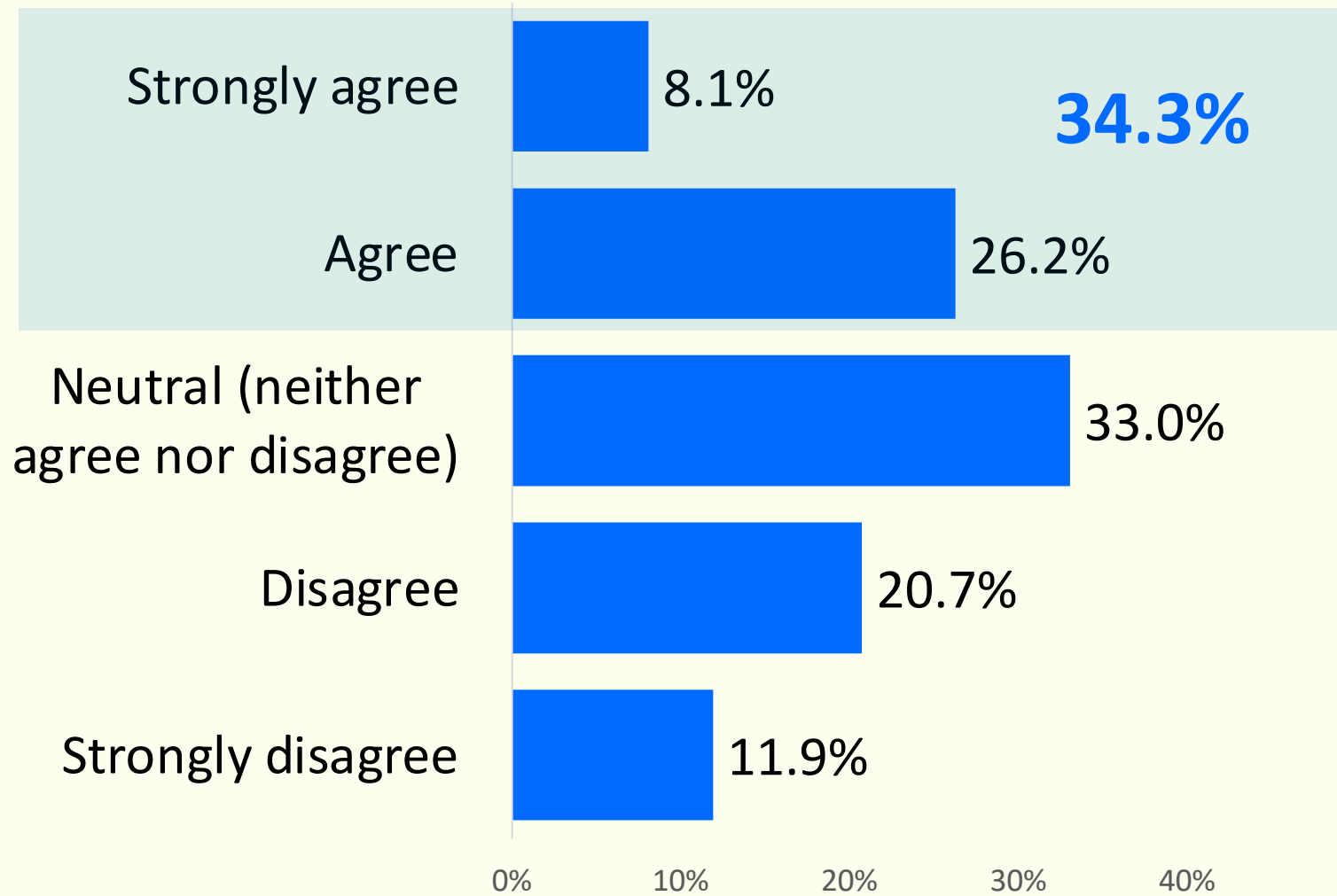
Excitement for travel remains at consistently high levels

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



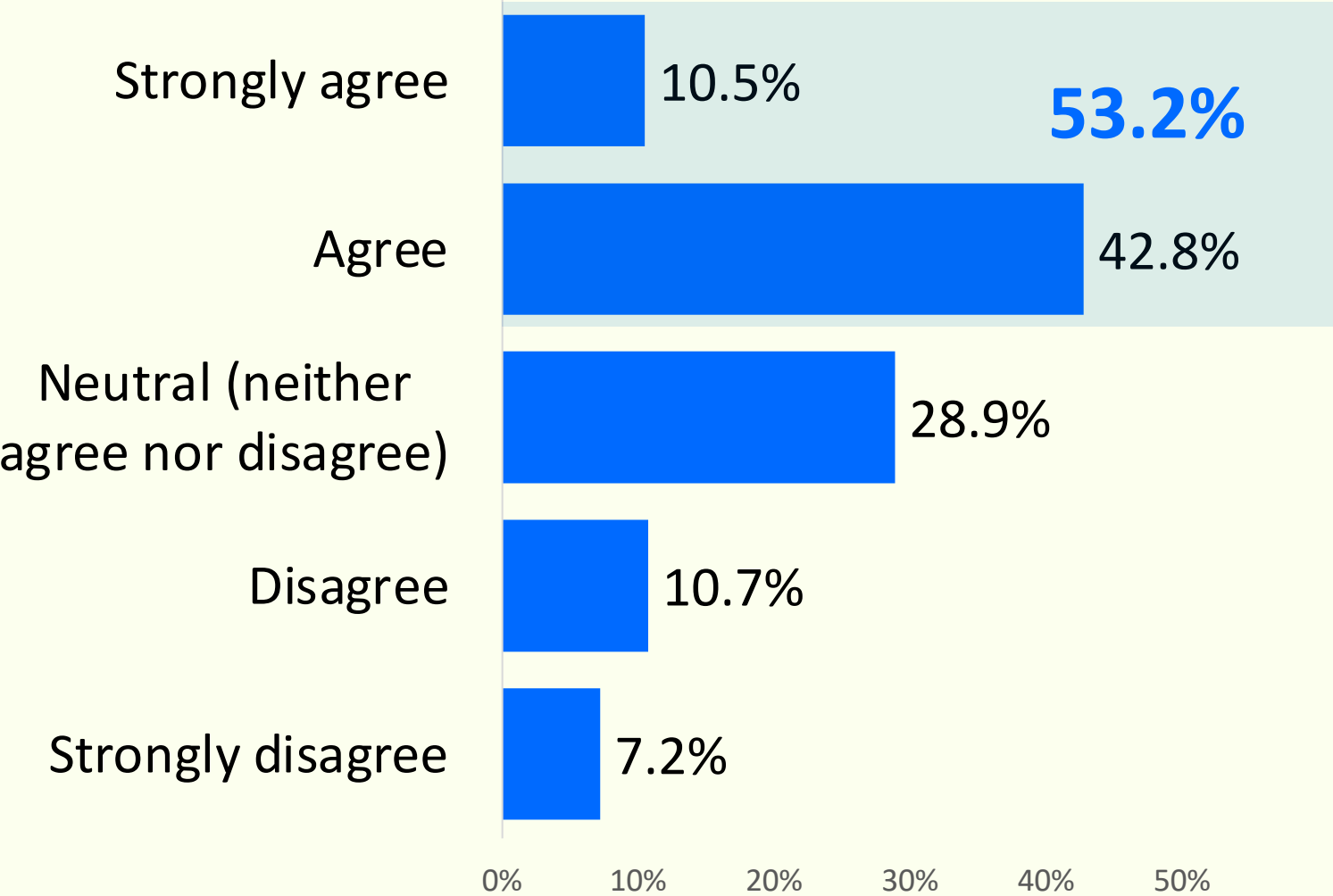
Over one-third consider travel spending essential

Question:
Right now, I consider spending money on travel to be essential.



Over 53% say even in a recession they consider travel a worthwhile investment

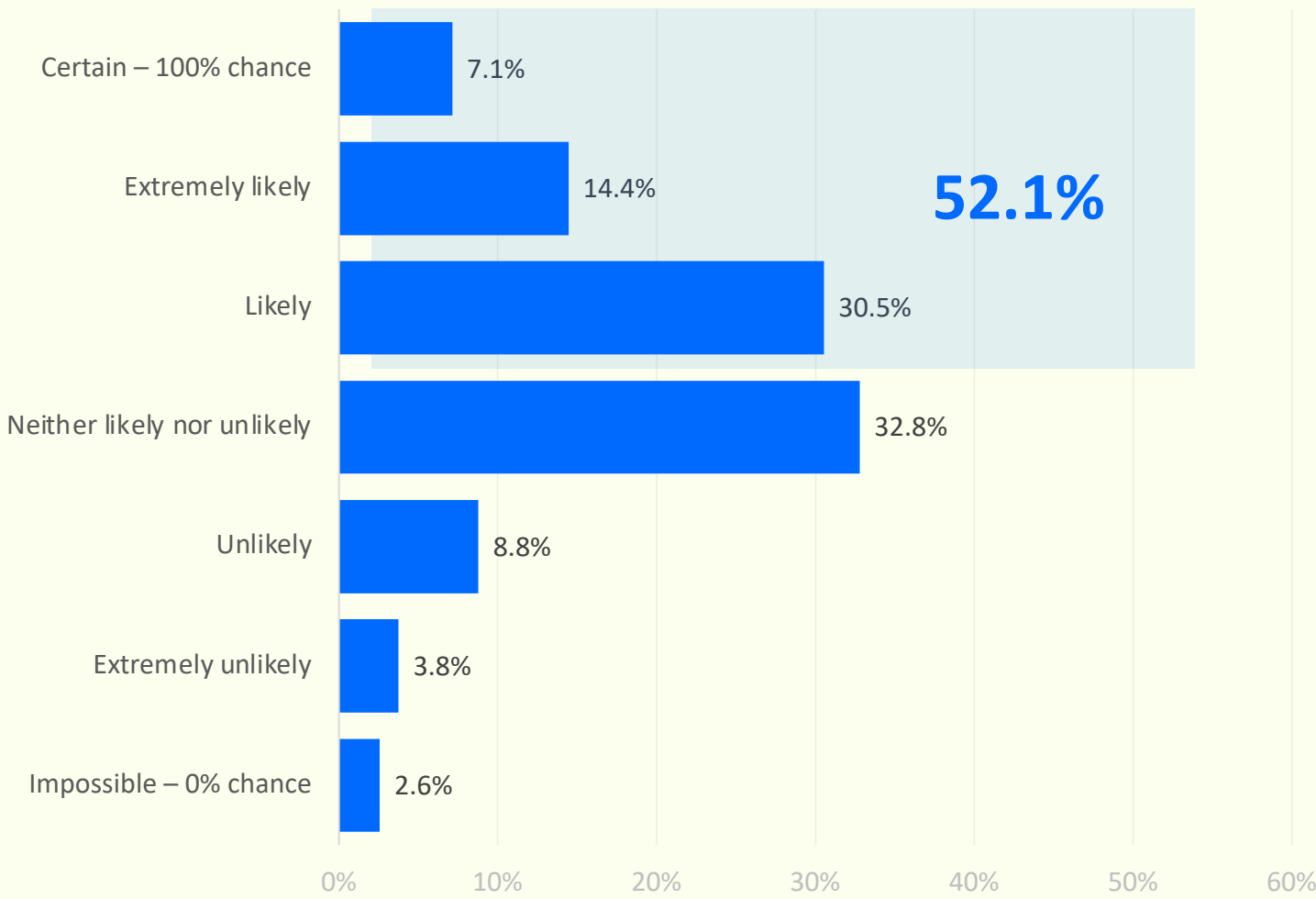
Question:
Even in an economic recession, I'd consider travel to be a worthwhile investment.



More than half of American travelers see workplace flexibility as a catalyst for more travel.

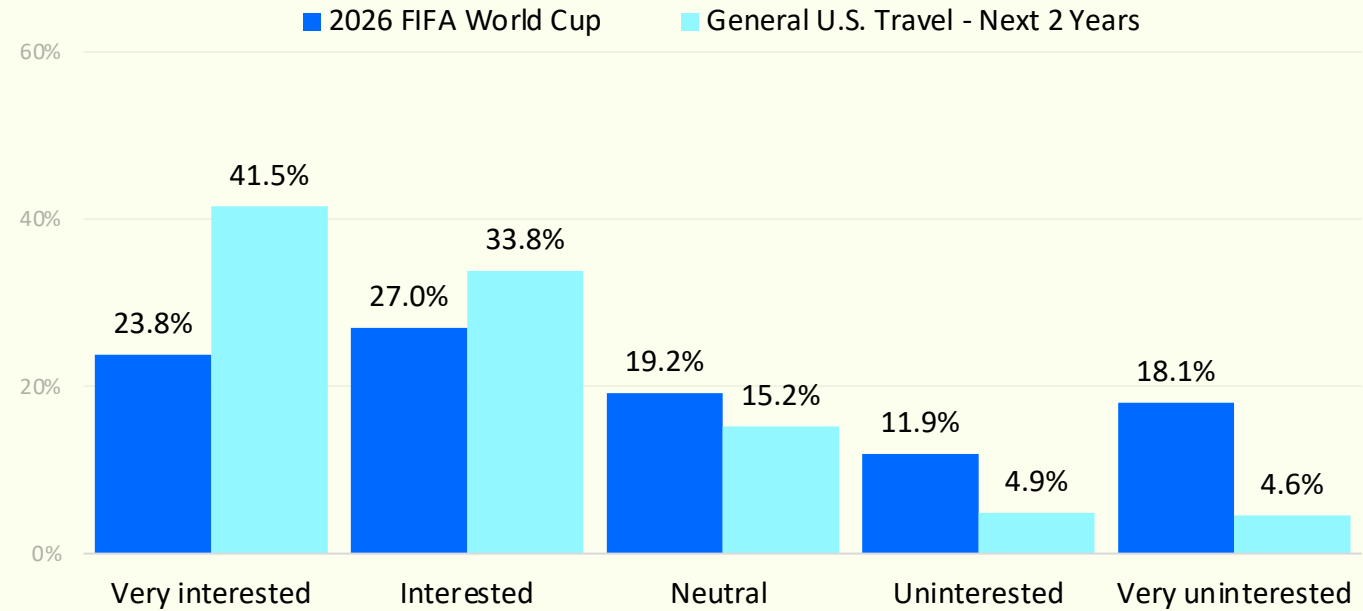
Statement:

Flexible work options, like remote or hybrid employment, will inspire people like me to take more leisure trips.

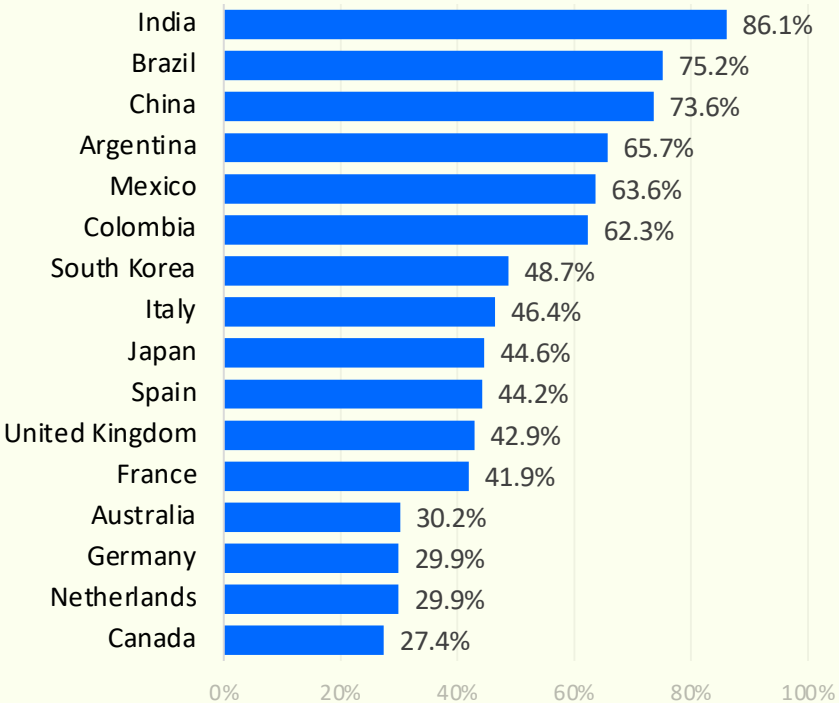


Just **over half** of international travelers surveyed would be **interested** in visiting the U.S. specifically for the **2026 FIFA World Cup**.

Interest in Traveling to the U.S.
2026 FIFA World Cup vs. General U.S. Travel in the Next 2 Years
(Total Aggregate)



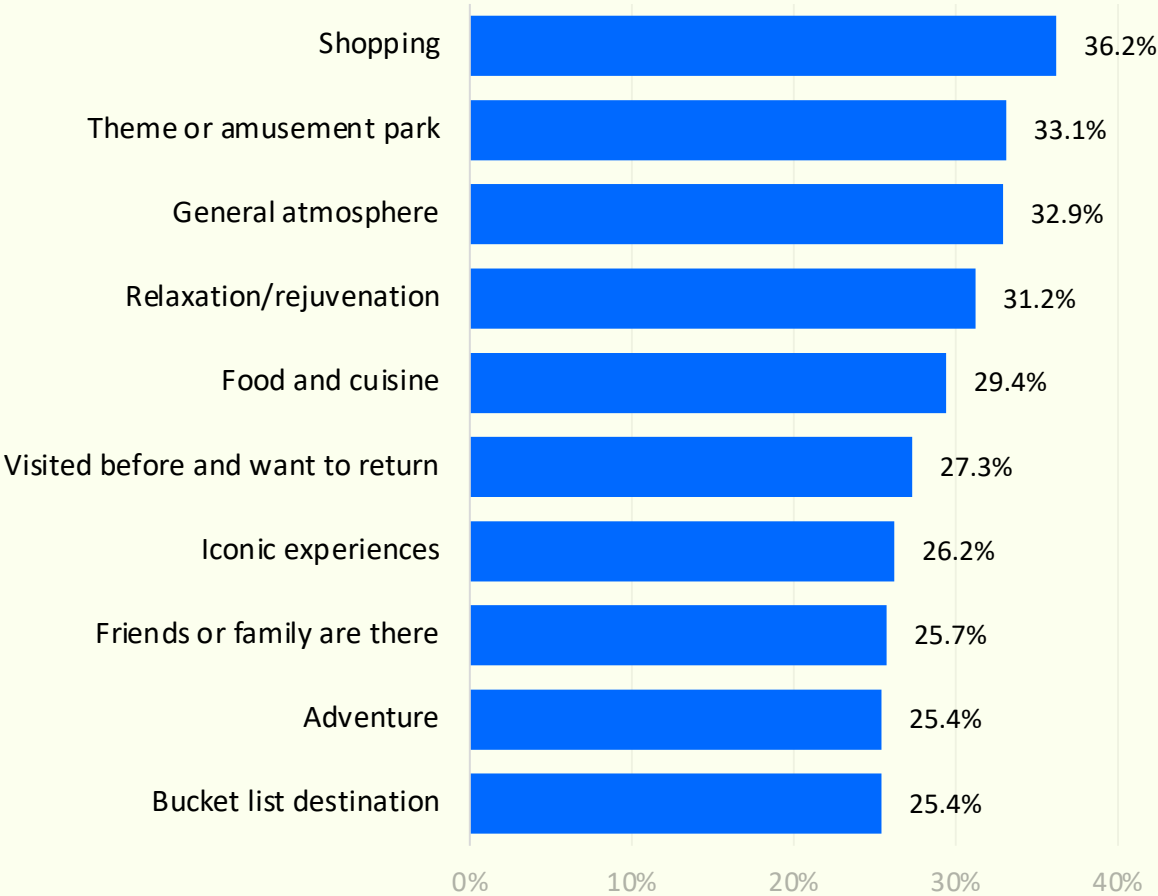
% Interested in Traveling to the U.S. for the 2026 FIFA World Cup – By Market
(Top 2 Box Agreement)



The International Travel Landscape: Most Desired International Destinations

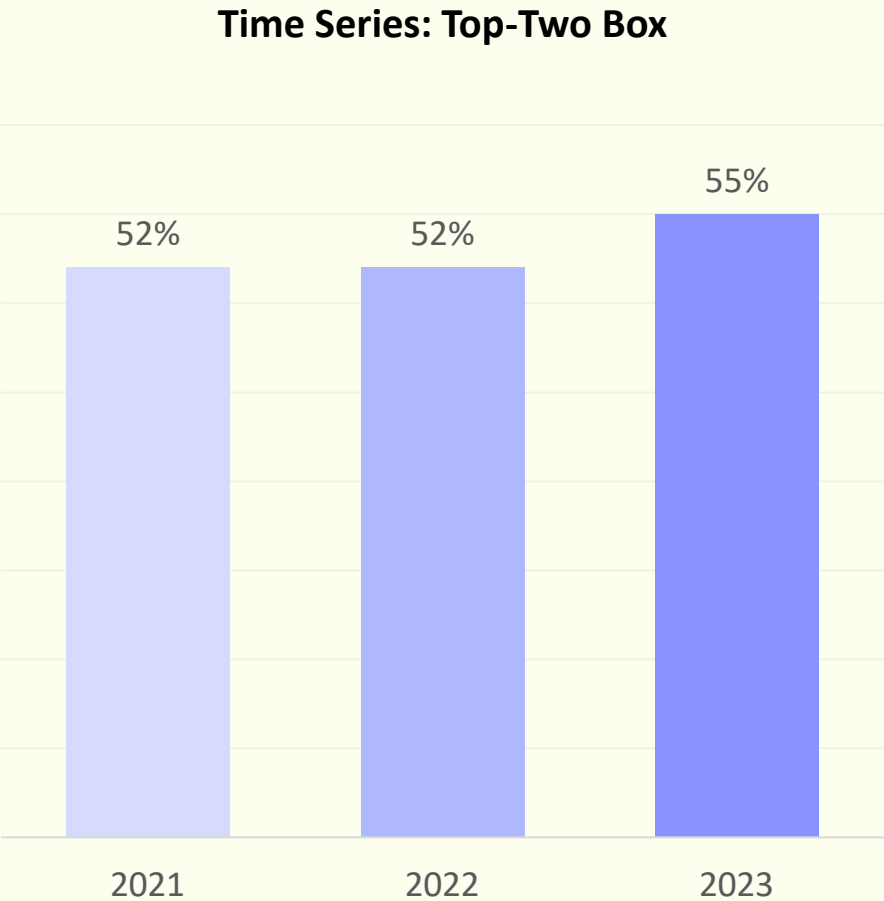
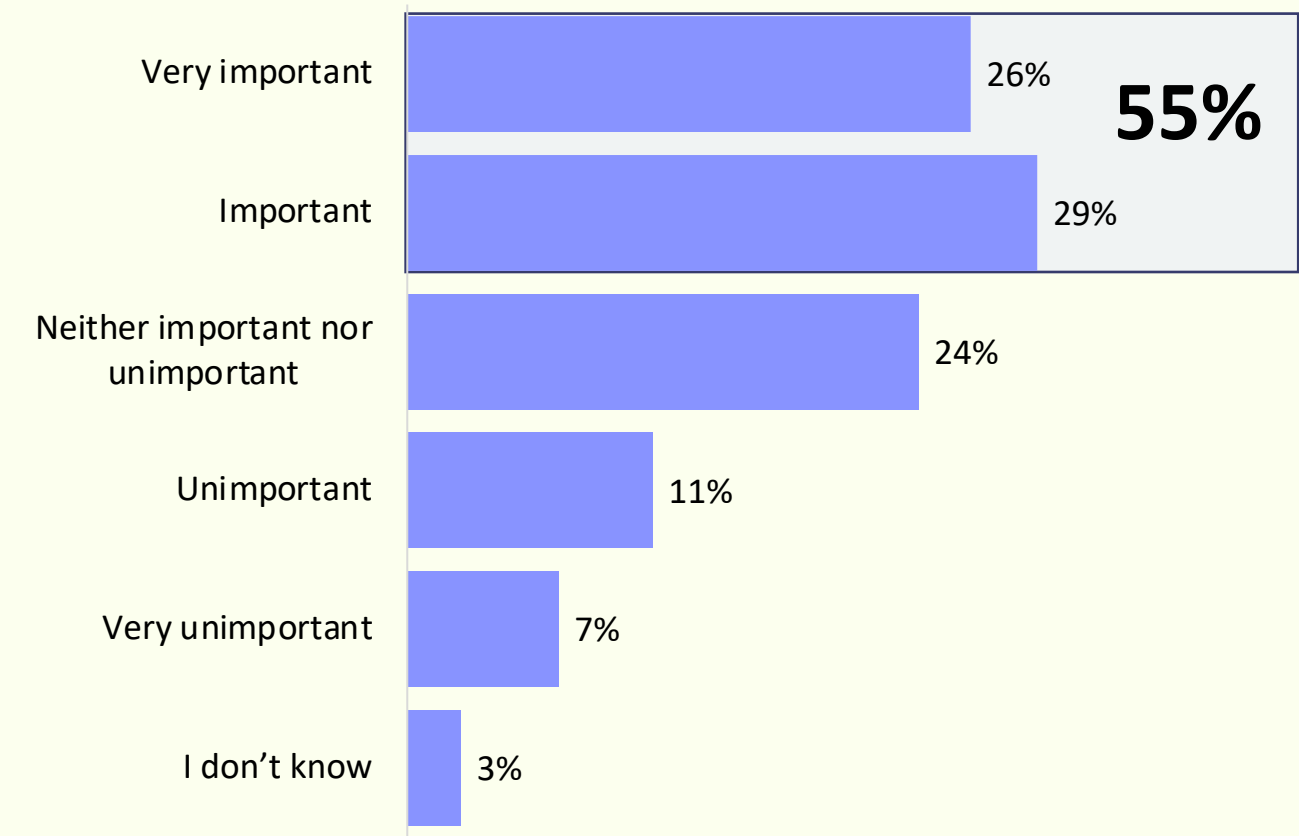
Shopping and fun vibes drive continued interest in the U.S.

Top 10 Reasons Why Global Travelers Want to Visit the U.S. in the Next Year
(Total Aggregate)



“I know that what is happening at a political level is not always representative of what people on the ground are feeling”

More Americans Now Consider the Tourism Industry to be Important to the Vitality of their Community



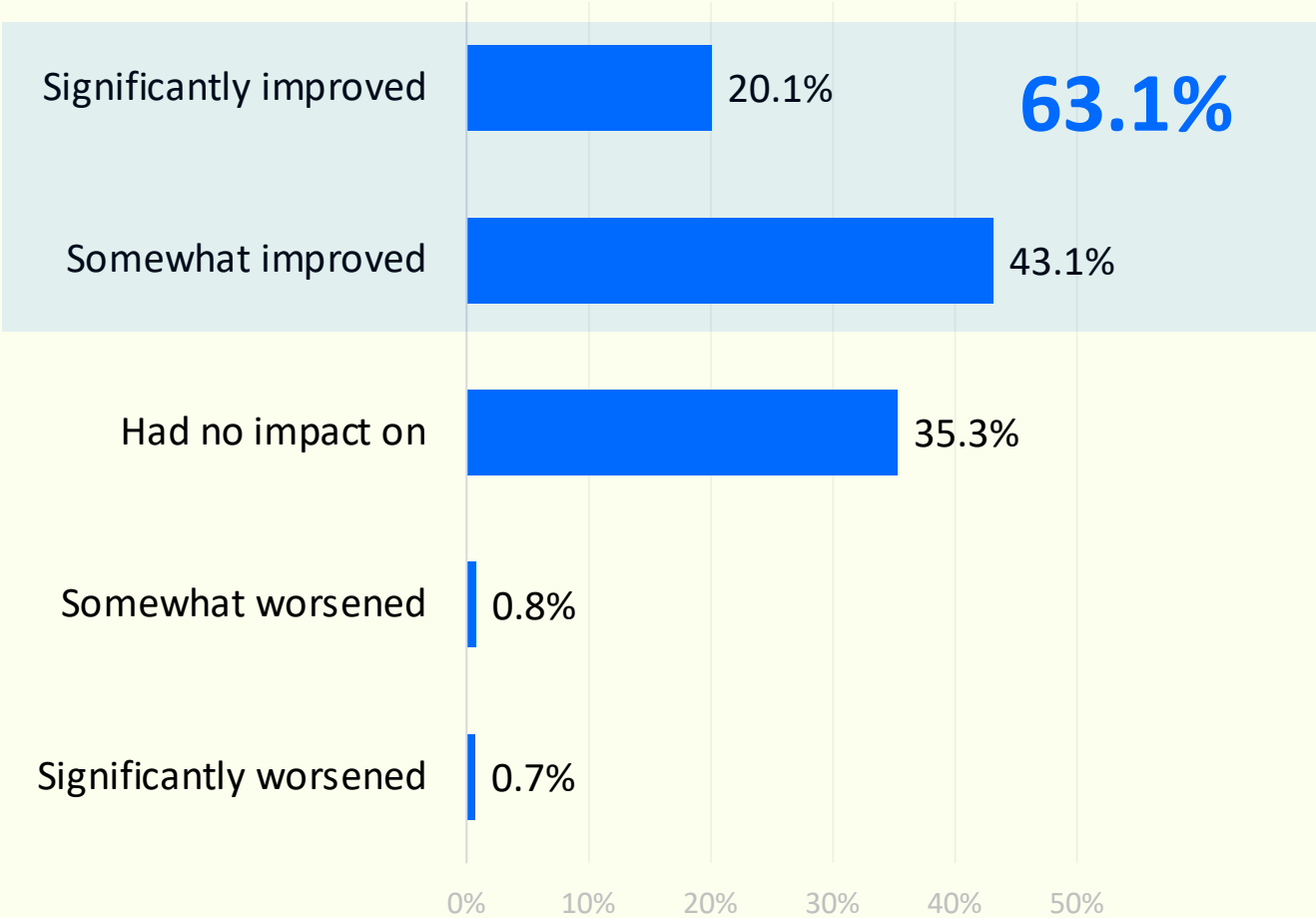
Question: In your opinion, how important is the tourism industry to the economic vitality of the community in which you live?

Travel improves relationships

Question:

How have your leisure travel experiences impacted the quality of your personal relationships? (Select one to complete the sentence)

Overall, leisure travel has _____ the quality of my personal relationships.



Thank You! More Insights Available



[instagram.com/futurepartners.tourism/](https://www.instagram.com/futurepartners.tourism/)



Info@futurepartners.com



[Linkedin.com/company/futurepartners](https://www.linkedin.com/company/futurepartners)



[Livestream Calendar](#)

LUXURY

#11 LUXURY

UNITED
KINGDOM
MARKET

#11 UNITED
KINGDOM

CEO UPDATE



CEO UPDATE

Canadian Car Travel To U.S. Plunges 32% In March
As Boycott Escalates

**Weekslong lockups of European
tourists at US borders spark fears of
traveling to America**

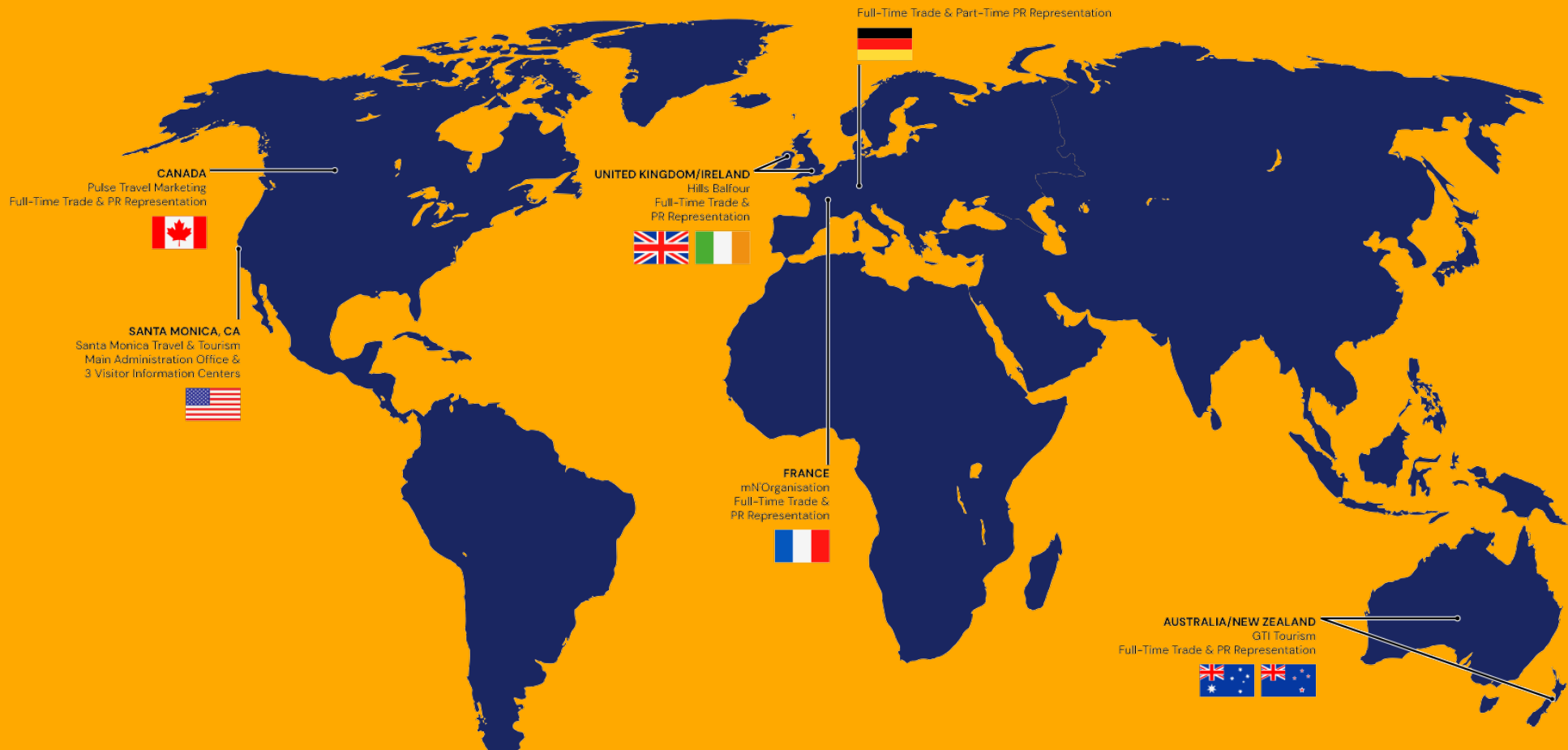
Why Are Countries Issuing Travel Advisories for the
United States?

'Trump Slump' Hits Expedia: Shares Fall 8% Due
To Weak U.S. Travel Demand

GLOBAL IMPACT



INTERNATIONAL REPRESENTATION



ACCOLADES

Sunset

"Where To Go
2024"

Tralee
TRAVEL

Favorite Beach
Town,
Southern California

WHEREVERFAMILY

The Trusted Source for the Modern Family

Best Family-Friendly Beach
Town

West United States

eTourism 

Best Multichannel
Marketing Campaign



Destination Marketing Website

TRAVEL+
LEISURE

Top 50 Places to Travel
in 2025



Adrian Award
SMTT Brand Refresh

Forbes

Top 12 Destinations
for 2025



North America's Leading
Beach Destination

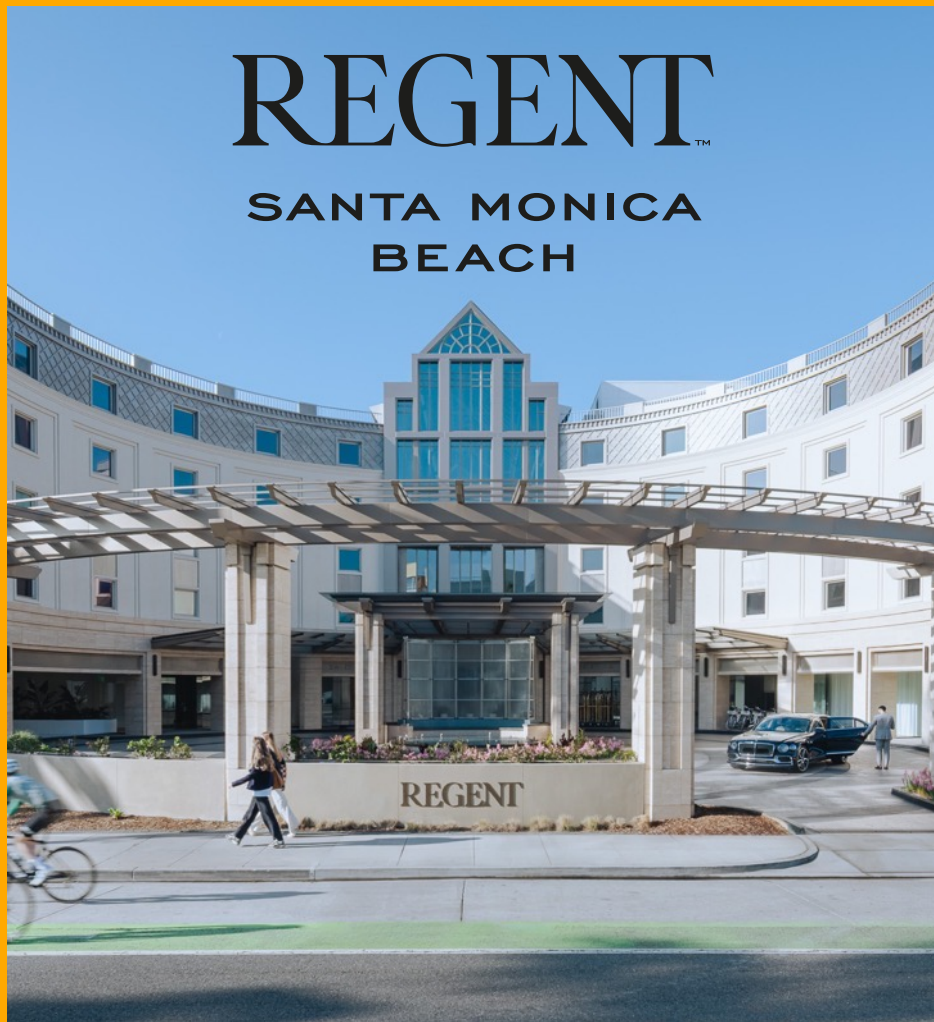


North America's Leading
Tourist Board

tripadvisor

Best of Best Beaches, #18

NEW OFFERINGS



CIRQUE DU SOLEIL



Kooza
CIRQUE DU SOLEIL®

NEW BUSINESSES



Google Store

NEW BUSINESSES



NEW BUSINESSES



S E L I N E

NEW BUSINESSES



LEGACIES



SANTA MONICA
— PIER —

LEGACIES



LEGACIES



1875-2025



COMING SOON

Santa Monica 150th Celebration

- *July 2025 – July 2026*

Route 66 Centennial

- *July 2026 – July 2027*

USA 250th Anniversary

- *July 4, 2026*

NBA All Star Game

- *February 13 – 15, 2026*

US Women's Open Championship

- *June 4 – June 7, 2026*

FIFA World Cup

- *June 11 – July 19, 2026*

Superbowl LXI

- *February 2027*

2028 Summer Olympic Games

- *July 21 – August 6, 2028*

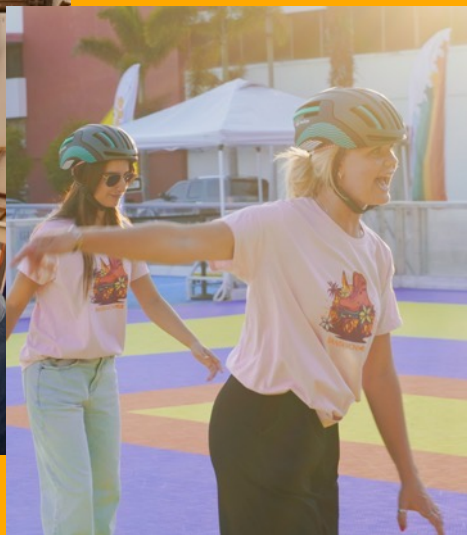
2028 Summer Paralympic Games

- *August 22 – September 3, 2028*

BETTER TOGETHER



CHECK US OUT



COMMUNICATION HIGHLIGHTS

#13 COMMS

WE
WELCOME

WE WELCOME
ALL RACES
ALL RELIGIONS
ALL COUNTRIES OF ORIGIN
ALL SEXUAL ORIENTATIONS
ALL GENDERS
WE STAND WITH YOU
YOU ARE SAFE HERE

WALK THE TALK

Spread Kindness

A stylized sun graphic consisting of three horizontal bars. The top bar is orange, the middle bar is light blue, and the bottom bar is dark blue. The bars have rounded ends and are centered horizontally.

Santa Monica

IT'S A VIBE.

62ABOVE

#14

62ABOVE

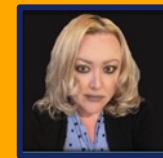
OUR TEAM



Rachel Lozano



Misti Kerns



Evan Edwards



Alyssa Dorn



Alexis Faust



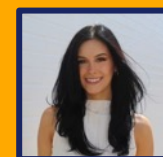
Aaron Seals



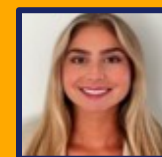
Aleksandr Sigalus



Ashley Dowgwillo



Ashlyn Martin



Bella Cifuentes



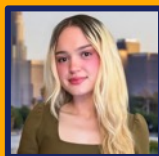
Cassidy Lawless



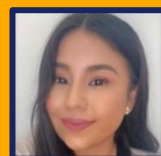
Cayla Turain



Emily Ohara



Indigo Sargent



Jacky Saquic



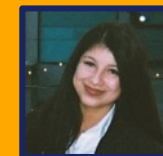
Jamie Hogan



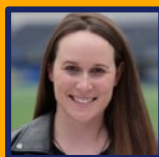
Jenna Kirkeeng



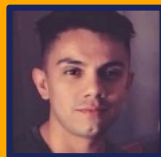
Julie Guffey



Kylie Escobar



Lauren Salisbury



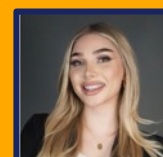
Luis Vazquez



Michelle Cassidy



Ozzie Otero



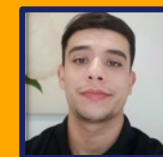
Shannon Hagen



Sydney Silverman



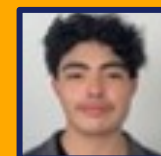
Tatum McGovern



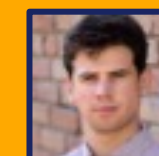
Juan Vazquez



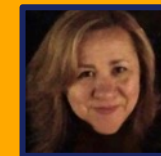
Matt Nielsen



Cesar Hernandez



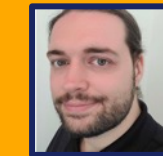
Harrison Ungert



Michelle Dimas



Michelle Medrano



Nick Dorn



Vinnie Edwards



Yarely Trejo

MARK TWAIN

“**TRAVEL** is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts. Broad, wholesome, charitable views of men and things cannot be acquired by vegetating in one little corner of the earth all one's lifetime.”

EXPONENTIAL GROWTH

THREE PRIORITIES FOR GROWTH



Compete for Global Visitors

- Visa Reform
- Brand USA



Modernize Travel Infrastructure

- ATC
- TSA
- Customs



Grow Every Segment

- Leisure
- Group
- Business

LOOKING AHEAD

A DECADE OF OPPORTUNITY



40 MILLION International Visitors
\$100 BILLION in Traveler Spending

U.S. TRAVEL
ASSOCIATION®

360

MARKETPLACE



THIRD
STREET
PROMENADE



**SANTA
MONICA**
TRAVEL & TOURISM

THANK YOU

Please join us on the beach for a reception