

April 2025 International Visitor Sentiment and Trends for Summer / Fall 2025

This is a brief recap of international market intelligence from Visit California and our 7 international offices on the trends they are seeing regarding travel to the USA in 2025, and California specifically

VISIT CALIFORNIA

- Aggressively promoting California welcoming culture: “All Dreams Welcome”
- Increasing spend in key markets affected by the policies from the Trump Administration (Canada, Mexico, France, Germany, China, UK)
- Leaning into the “California isn’t-Washington D.C. space” with a direct message from Gov. Newsome to Canadians

GERMANY

- After a strong start for USA and California bookings from November to January we have seen a decline in February and March
- Reports from most key tour operators that new bookings for summer and fall are slowing down.
- A decline of around 10% happening this year and hopefully due to 2026 world cup a rise again in 2026
- one positive side effect for travelers to the USA happened in the last 2 weeks - the US\$ got substantially weaker and the Euro buys 0,10 Cent more US\$ than earlier this year.

FRANCE

- Booking challenges included confusion around Yosemite National Park’s reservation system—a source of frustration and hesitancy in itinerary planning.
- Overall U.S. bookings are declining, though cancellations have not materialized. Canada is rising as a competitor for outdoor experiences.
- Media remain enthusiastic about covering California and see it as offering distinctive, “Only in California” stories.
- Opportunities include positioning California as distinct from the U.S. through storytelling that highlights local culture, sustainability, and seasonal travel. Road trips remain a winning angle—consider escorted options where language may be a barrier.

UNITED KINGDOM (UK)

- It's a hyper competitive market and Brits have a lot of choice, with many U.S destinations investing heavily in the market, alongside competitively priced destinations in Asia.
- media news headlines are, on the whole, negative towards Trump and the U.S. The focus has shifted from just being political news to highlighting how tourists to the U.S are now affected
- However, media headlines aren't the whole story and that Brits tend to be quite resilient and less sensitive to sensational headlines
- Tour ops are reporting a mixed bag - luxury operators have seen strong Q1 bookings for California, others are seeing a softening in searches or drop in US searches and bookings in March
 - BA reported on Friday (11th April) that premium cabins for bookings to SFO, LAX & SAN are holding up well. They are optimistic about their upcoming May sale
 - With Canadians not travelling hotels are dropping their prices, which is making California more attractive to Brits
 - Data from Brand USA at the start of April showed that likelihood to travel to the US remains fairly constant, with no drop off on 'likelihood to visit US from UK'
 - Ben Ross, The Telegraph's Head of Travel, confirmed that their website metrics show readers remain strongly invested in America and they haven't seen a drop-off in reading of US articles
- US has become incredibly costly over the last few years, but we seeing a change of wind with the XE rate going in our favor, whilst other destinations, such as British favorites France & Italy, are becoming more expensive with the Euro XE rate
- Lots of excitement building for USA events, such as the FIFA World Cup and Olympics - we have a HUGE opportunity in this market in particular with the World Cup, so we really recommend capitalizing on this global excitement and leveraging the increased media attention

NORDICS

- Scandinavian Tour Operators are reporting a decline in search and forward bookings for Summer 2026 is down by 20-30%
- SAS and other airlines, starts to see decline YOY in corporate travel for the coming 6 months
- The media has softened a bit on USA and travel to the US over the weekend which is good news

AUSTRALIA / NEW ZEALAND

- **Australians separate politics from travel.** While political headlines in the U.S. are prominent, they are not a major deterrent to travel. Australians have shown they can compartmentalize politics and still pursue holidays that offer value, culture, and adventure.
- **California is perceived as more welcoming.** Brand tracking shows California consistently outperforms other U.S. states on emotional attributes like “diverse,” “inclusive,” and “welcoming.” This perception reinforces California’s appeal as a destination that reflects shared values.
- **Economic factors outweigh political ones.** While tariffs and politics receive media attention, the biggest barriers for Australians are the weaker exchange rate and overall trip cost. Value, not values, is the primary decision driver right now.
- **The FIFA World Cup will be a major visitation driver.** The 2022 Qatar World Cup attracted 3.4 million spectators, including over 1 million international visitors ([FIFA](#)). California will host matches in both Los Angeles and the Bay Area in 2026, and the [Governor](#) has forecast more than \$1.2 billion in economic impact, with \$594M in LA County and \$630M in the Bay Area.

INDIA

- **The outlook remains highly positive.** The USA is one of the most aspirational destinations for Indian travelers. Demand for travel to the U.S. continues to be strong, with California retaining its position as the most popular state for Indian travelers.
- In 2024, California received **579,000 Indian visitors**, who spent **1.5 billion**. By 2028, India will contribute \$2.1 billion in spending to the state’s travel economy.
- **Road Trips: India’s massive millennial population is driving demand for road journeys, the outdoors, and authentic local experiences.** Major car rentals have all reported that California is their prime market from India in the US.
- **Strong Demand:** Outbound travel from India is growing rapidly, and there is high interest in personalized, luxury, and experience-driven itineraries.

CANADA

- **The market with the strongest “boycott travel to the USA” sentiment**
- Double digit decline in visitation for 2025
- Aggressive campaign from Visit California to separate California from Washington D.C.
- Visit California very active in Canada (Expedia) and consumer direct to amplify California’s message of inclusion

CHINA

- China and the U.S. have now implemented the maximum level of tariffs on each other—an unsustainable situation for either side. It is widely expected that the two countries will eventually return to the negotiating table, although it remains too early to predict the direct impact on U.S.–China travel in the near term. Over the weekend, Trump Administration exempted tariffs on electronics and related items, which represents about 40% of China exports to the U.S... we, as AVIAREPS, expect that the situation should be resolved in the next two months before June.
- China issued a U.S. Travel Advisory for travel to the U.S. and encourages Chinese travelers to “assess potential risks and plan accordingly”
- Pre-booked travel to U.S. has not seen major cancellations, but future bookings have declined
- Travel for the 2028 Los Angeles Summer Olympics continues to look strong

JAPAN

- The World Cup will definitely carry strong interest in Japan and would be amazing if the Japanese national team’s group games took place in CA, and be based around the state. The Samurai Blue would also anticipate qualifying for the knock outs and could play in SF or LA as well.
- Baseball is far and away the biggest motivator for Japanese travelers. Several Japanese operators produce packages that include multiple game experiences in one trip
- In 2024, the yen hit a 38-year low against the US dollar and although recent market volatility has caused the yen to strengthen, it is still at the mid-¥140 level (¥120 to 1USD is the ideal exchange rate for long-haul outbound travel to US). In FY 25-26 the weak yen, competition for air seats and the overall low propensity to travel by Japanese will continue to be challenges to growth.
- California's main competition is Japan, with 49% of our target market planning to travel domestically in 2025. When traveling abroad, most people prefer short-haul Asian destinations for their convenience and affordability (South Korea, Thailand, Taiwan). Hawaii is less competitive due to high prices, lack of new attractions and issues like homelessness and crime.

MEXICO

- Double digit decline in arrivals by flights
- Single digit decline in arrivals by drive