

WAYFINDING

Reaching New Visitors Through Travel Trade
April 9, 2025



See Monterey Team



Alyssa Rendon
Director of Community Relations



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Sr. Business Development
Executive, Travel Trade

What is Travel Trade?

Travel Trade Landscape

Online Travel Agencies (OTA)

- Expedia, Hopper
- Viator, Get Your Guide

Bedbanks and Receptive Tour Operators

- Hotelbeds, WebBeds, Bonotel
- Receptive tour operators (ie ATI)

Tour Operators

- Collette, Globus, Sports Leisure Vacations, Premier Golf
- Virgin Atlantic Holidays, BA Holidays, Trailfinders

Travel Agencies

- Independent Contractors
- Host Agencies (Coastline, Fora, Altour, Amex)
- Consortia (Virtuoso, Signature Travel Network, Travel Leaders)

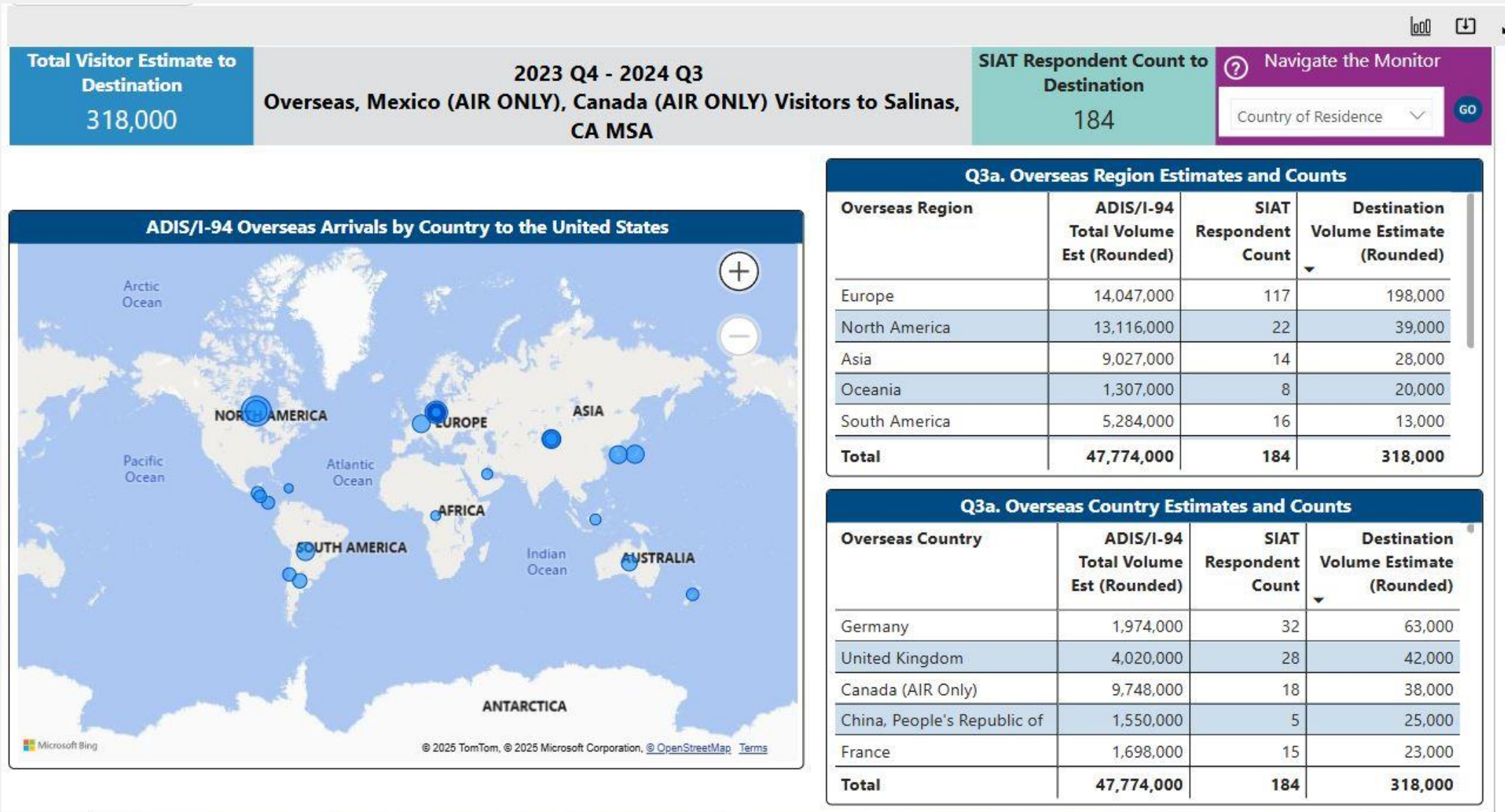
Travel Trade Tactics



Connect Spring
Marketplace



- B2B Tradeshows
- Sales Missions
- Professional Development (webinars, online training platforms)
- International Representation
- Familiarization (FAM) Trips
- Travel Trade Marketing

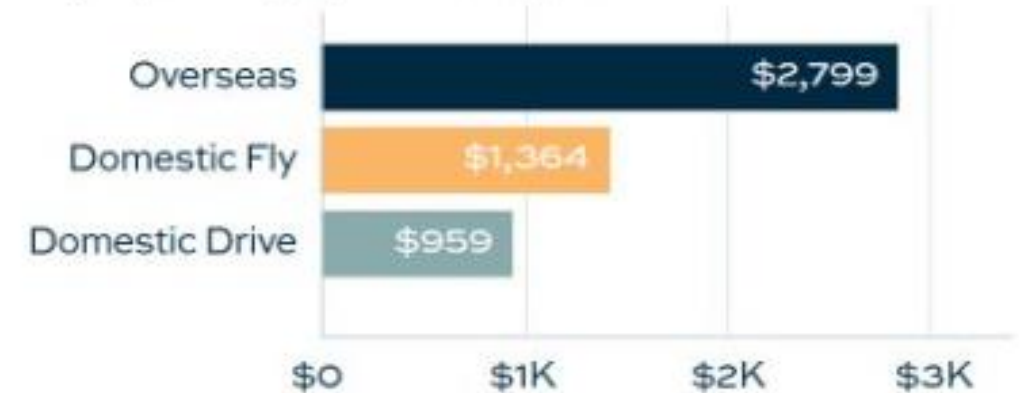


The International Traveler

- **Explore more of the destination**
- **Stay longer...*"one more night"***
- **Spend more... 3-5 times more**

The 2024 Visitor Profile Study shows a drop in international visitation to Monterey County from approximately 13% pre-pandemic to 7%.

Trip Spending by Visitor Type



International Projections

- **Downward international travel projections**, especially from Canada, due to a combination of declining travel sentiment and the strength of the U.S. dollar.
- **The strong dollar** is creating a double impact—making U.S. travel more expensive for international visitors, while also making overseas travel more appealing to Americans.
- Tourism Economics has shifted its 2025 international travel forecast from modest growth to a **projected 5.1% decline**.
- Shifts in top international markets (visits to the U.S.):
 - **Declines:** Canada (-15%), France (-5%), Germany (-5%), Mexico (-5%), UK (-3%)
 - **Growth:** India (+3%), Brazil (+3%), Japan (+6%), South Korea (+9%), China (+10%)

Meet our panelist



Brian Wright

Director of Trade and Group Business
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



Board Leadership



USA

visit
California

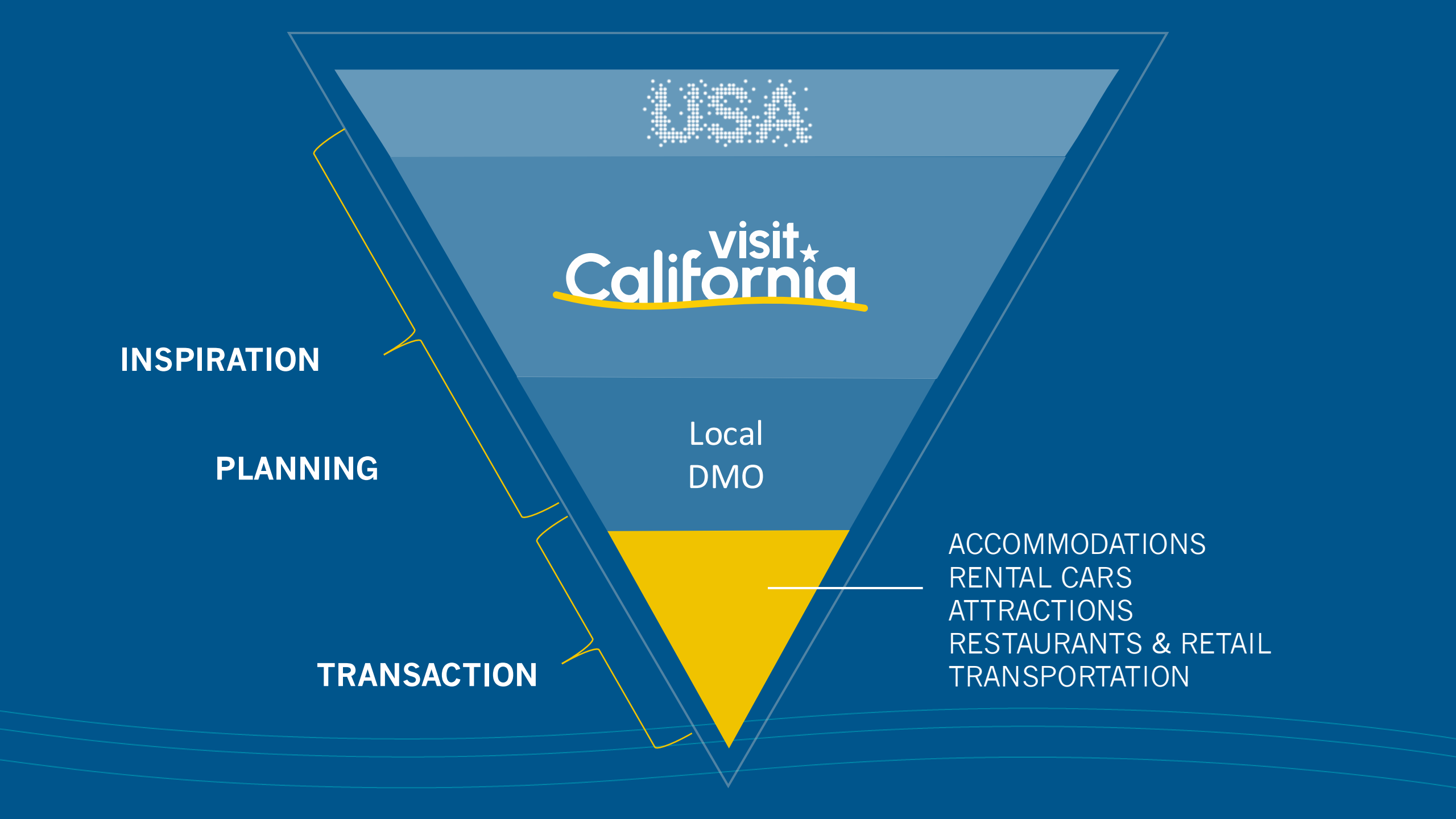
INSPIRATION

PLANNING

Local
DMO

TRANSACTION

ACCOMMODATIONS
RENTAL CARS
ATTRACTIONS
RESTAURANTS & RETAIL
TRANSPORTATION





State of Tourism

2024 economic impact

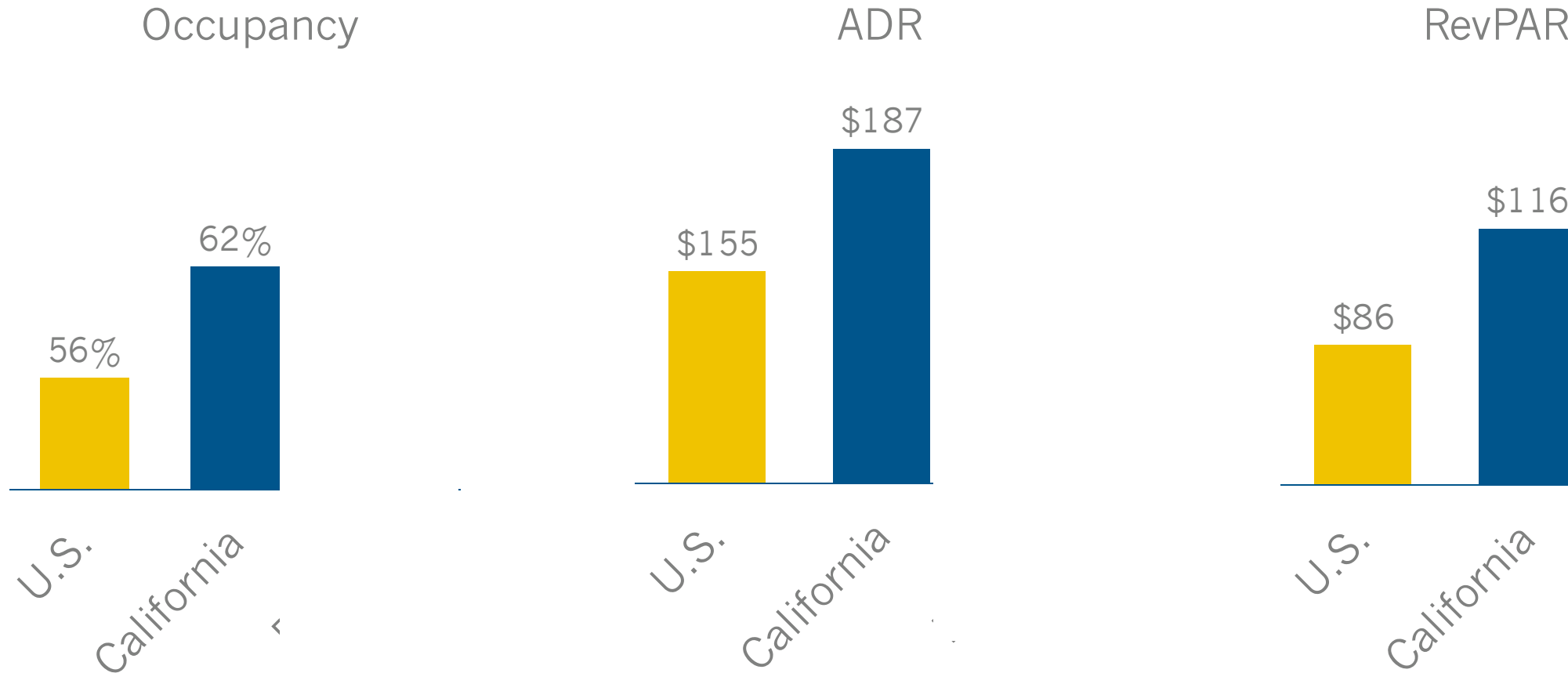
Travel-Related Spending	\$156.4 billion	+2.7% YOY
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Tax Revenue	\$12.6 billion	+3.0% YOY
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Jobs	1,165,000	+2.2% YOY (+24,500 jobs)
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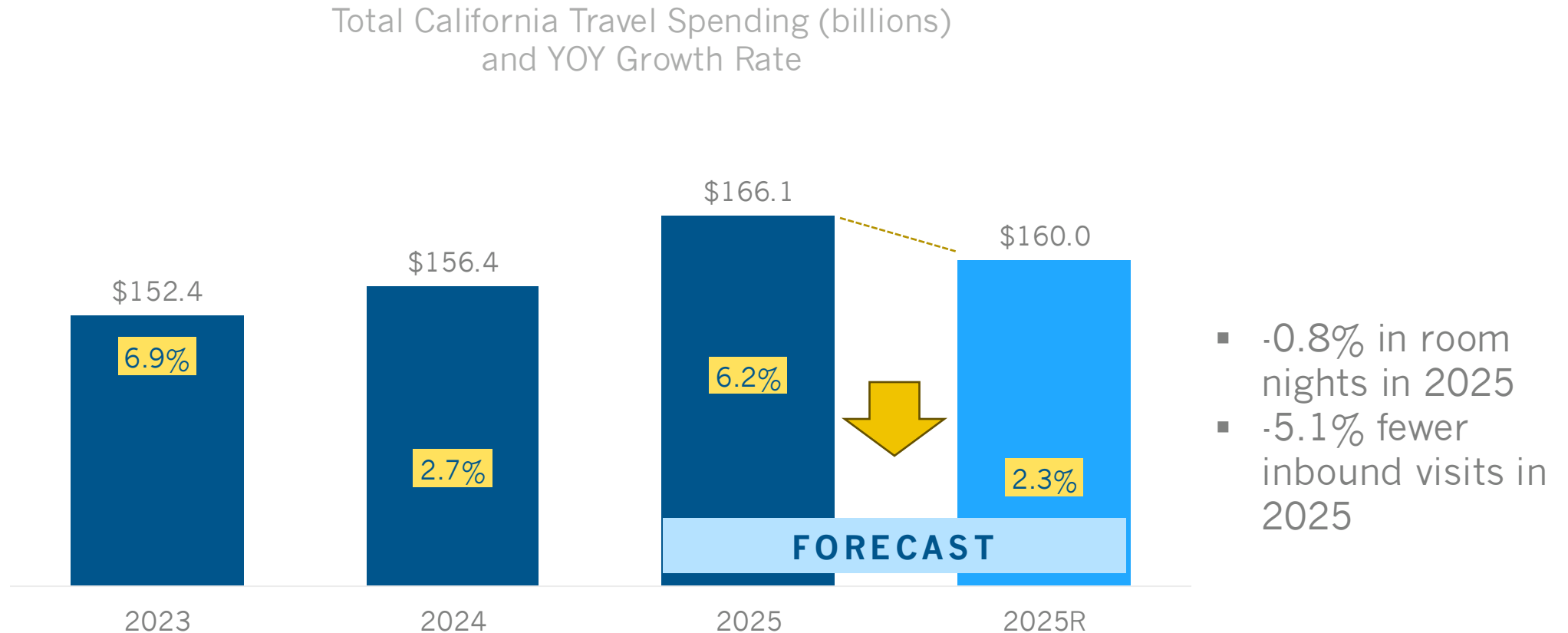
Source: Dean Runyan Associates

California lodging outperformed U.S.



Source: CoStar, February 2025 YTD

California travel spending forecast



Source: Tourism Economics (February 2025 and March revision)



Driving Global Demand for California

International visitation is critical

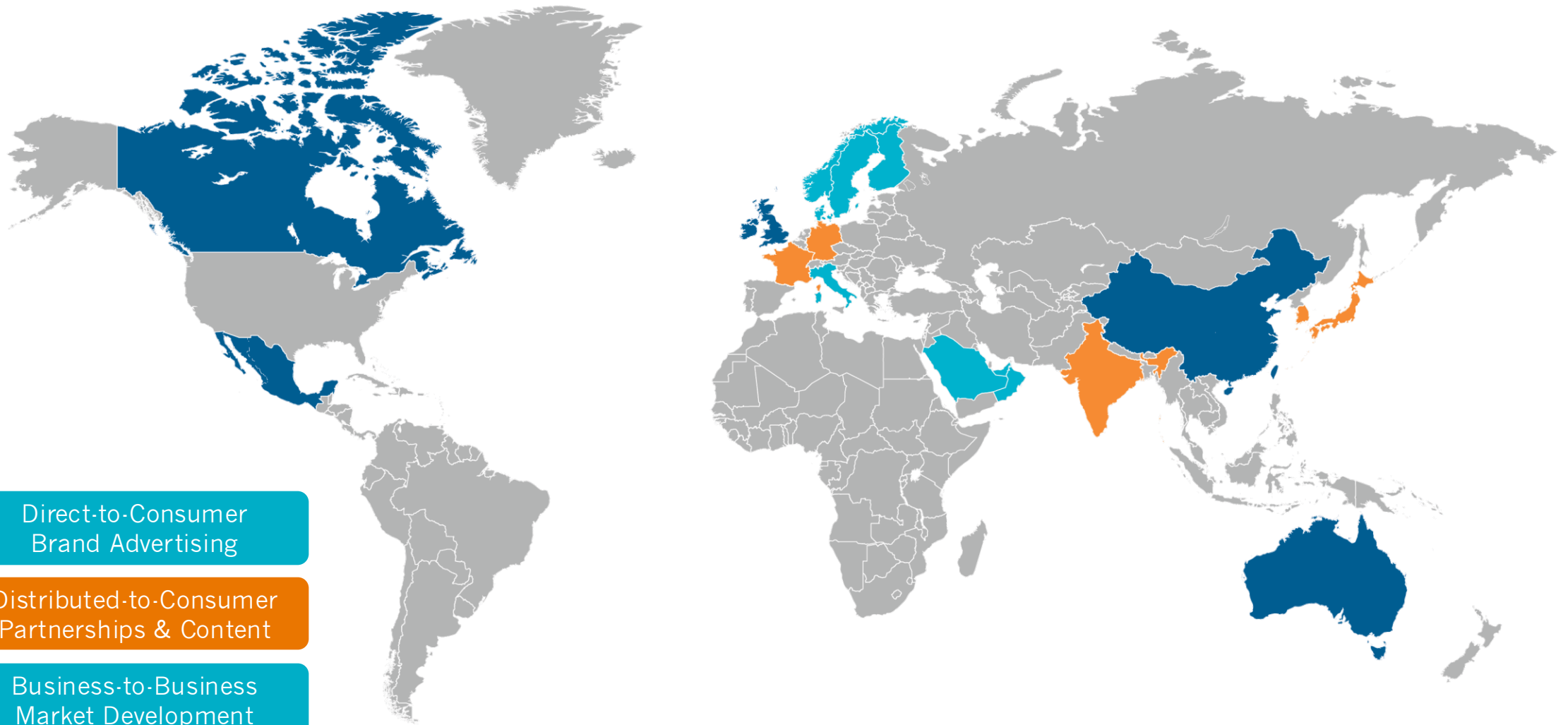
- The state's most valuable export
- Premium consumer, spending an average of \$1,551 per visitor



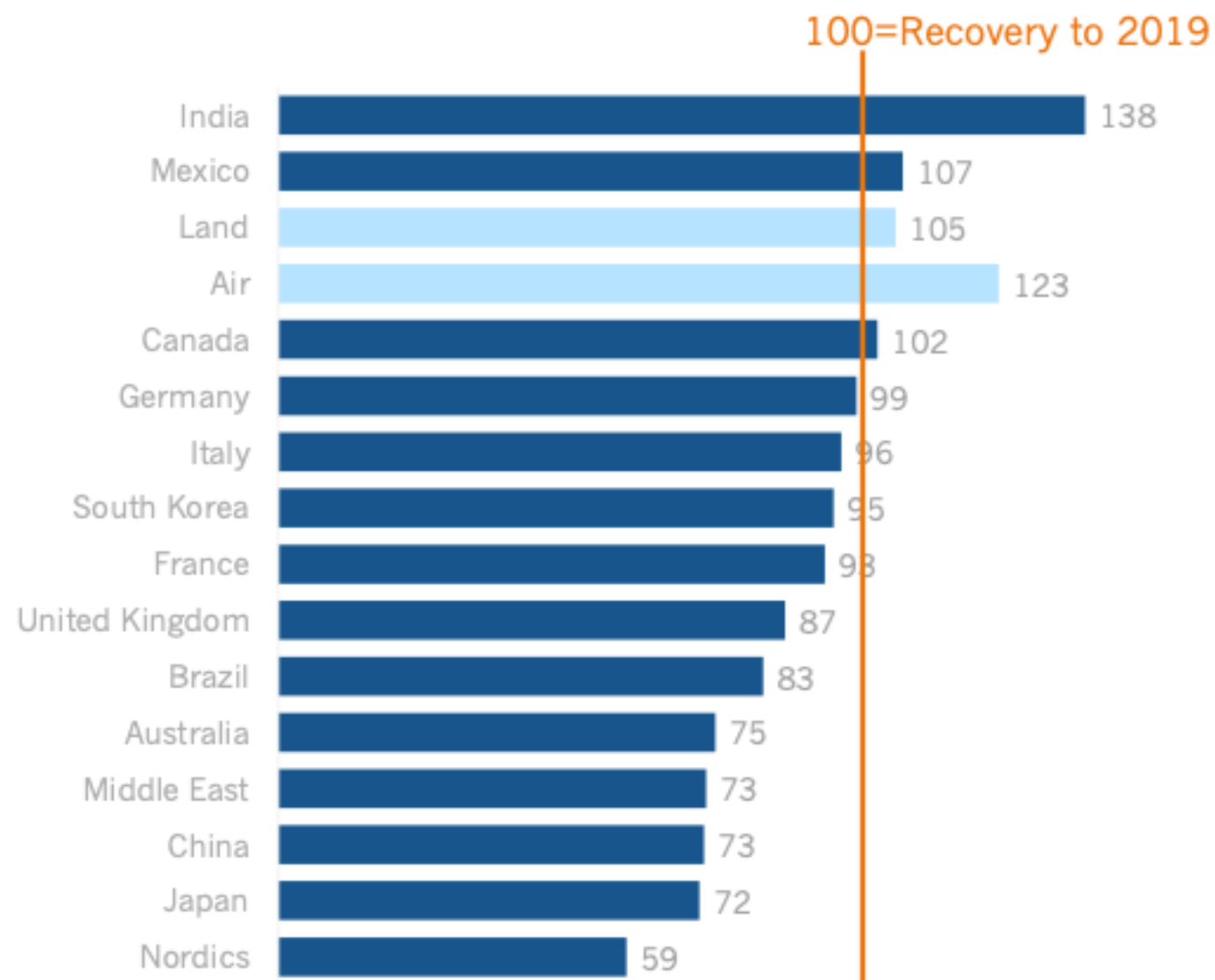
Direct-to-Consumer Brand Advertising

Distributed-to-Consumer Partnerships & Content

Business-to-Business Market Development

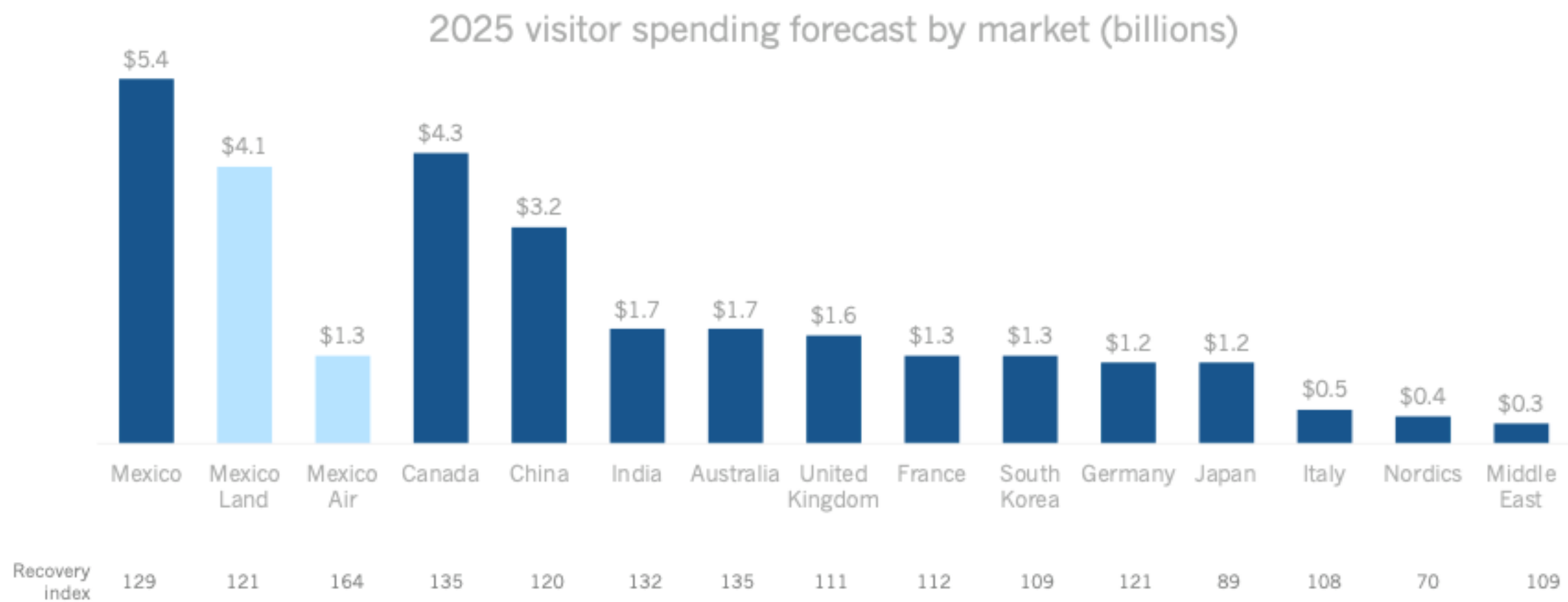


2024 International visitation



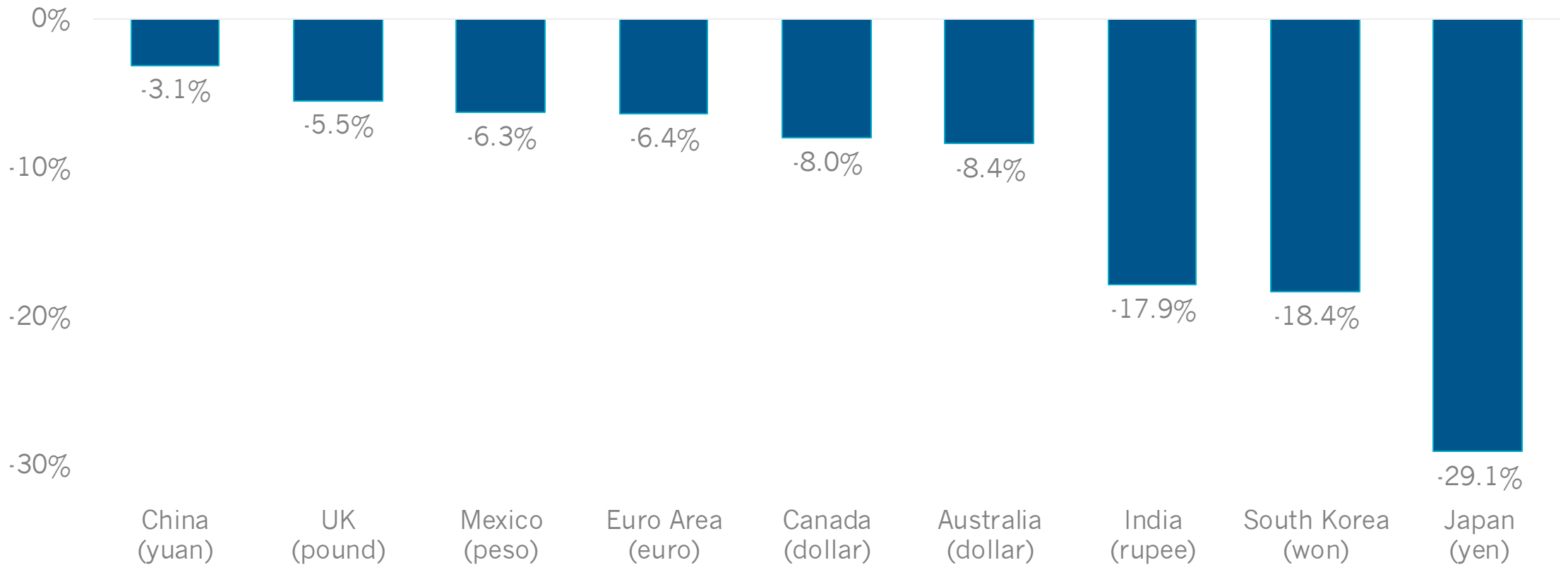
Source: Tourism Economics (February 2024 update)

California international spending forecast



Source: Tourism Economics (February 2025)

Change in USD exchange rate vs. 2019



Source: Rise, Feb. 18, 2024



Guiding Principle

***DO WHAT THE INDUSTRY CAN
NOT DO FOR ITSELF.***

Global Travel Trade

STRATEGY

Agent Education & Engagement



Global Product Development Strategy



Global Airlift



Luxury Audience Strategy





Resources available to you

industry.VisitCalifornia.com

Meet our panelist



Nick Hentschel
Chief Operating Officer
AmericanTours International LLC (ATI)



2025 Outlook: Opportunities Amidst a Challenging Inbound Tourism Landscape

Monterey, CA
April 9, 2025



- 2024 was a strong year for inbound travel from most major international markets, with recovery close to or beyond pre-pandemic levels
- Early bookings for 2025 (pre-January peak booking season) started off strong for top overseas markets, but shifted in January
 - Some impact for the west coast due to LA wildfires, primarily on west coast tours starting and/or ending in Los Angeles
 - Bookings slowed in late February when geopolitical environment worsened



- Certain markets are more resilient and less politically sensitive than others
 - Example: UK vs Denmark
- All source markets report that the cost of travel and the relative value of the destination coincides with political challenges to make it a difficult environment for selling the USA
- So where are they going instead of America?
 - European leisure travelers go East rather than West
 - Primarily booking destinations that are perceived to be better value
 - A mixed bag: Canada has performed better according to some operators while others have said Canada business books much earlier, so it was in largely too late for Canada to replace US bookings by January / February



2024 Top 10 Source Markets to Monterey	ATI's Monterey YTD 2025 v 2024
Germany	-8%
UK	5%
USA	11%
Netherlands	-7%
Switzerland	-12%
France	-18%
Belgium	-15%
Italy	4%
Spain	10%
China	2%



Challenges & Opportunities

Challenges:

- Supplier focus on booking window within 30 days – driven by domestic OTA business
- Clients not receiving special offers during early booking period (90+ days out)
- Resort Fees
- Static vs Dynamic

Opportunities:

- Static & Dynamic Rates
- Resort Fee inclusive rates
- ATI's Drive America Program (ie *Central Coasting on the Pacific Coast Highway*)
- Growth potential in shoulder season and off-peak periods





AmericanTours International

Thank you!

Please contact your ATI Product Manager

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Panel Discussion



Q&A



Thank you for joining!

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