



TOURISM AUTHORITY

Macroeconomic and Market Overview

September 25, 2025



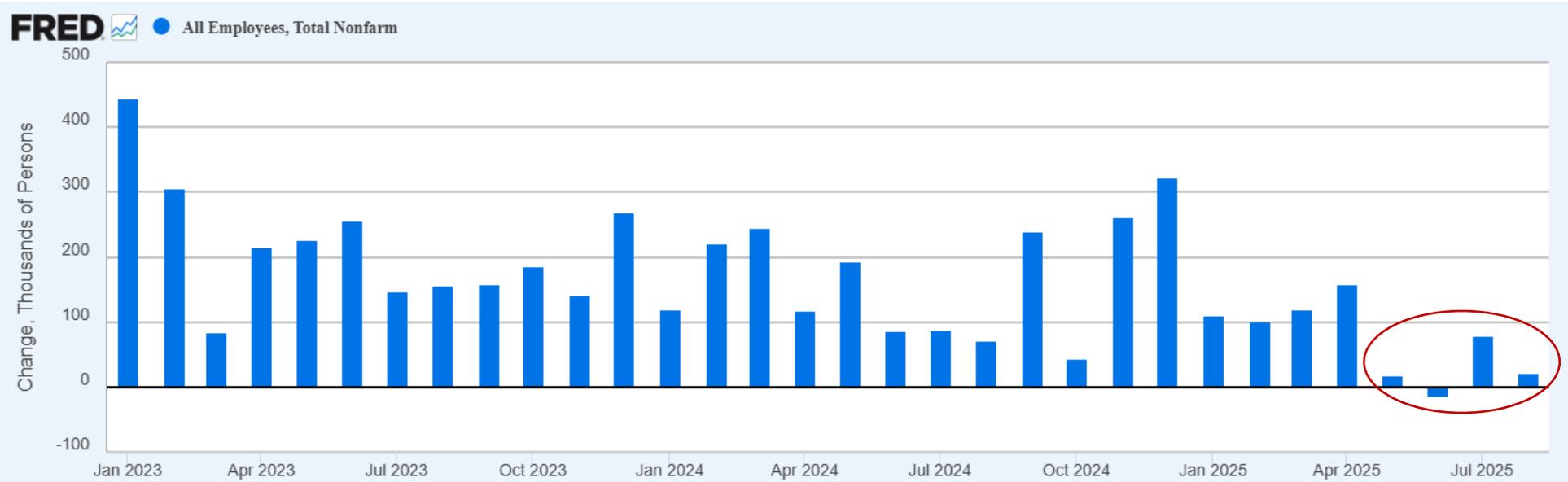


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U.S. Economy



Job Growth Slows to a Crawl



Source: U.S. Bureau of Labor Statistics via FRED®

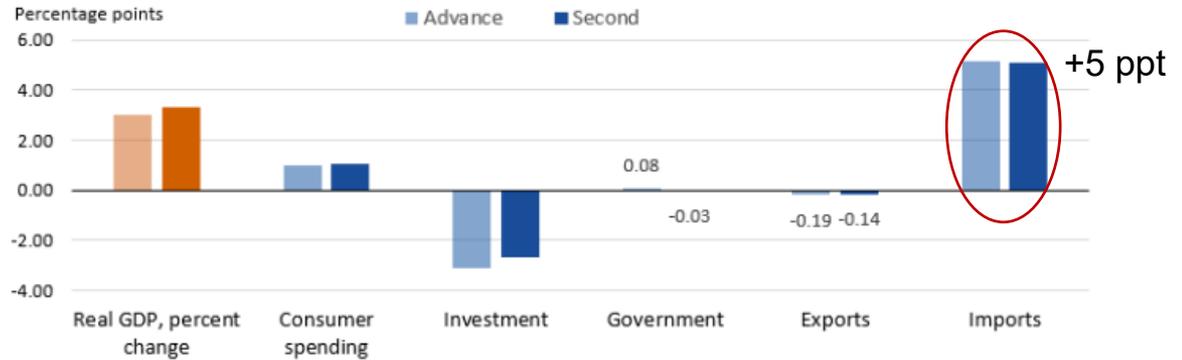




Underlying Growth Falters

Contributions to Percent Change in Real GDP, 2nd Quarter 2025

Real GDP Increased 3.3 Percent



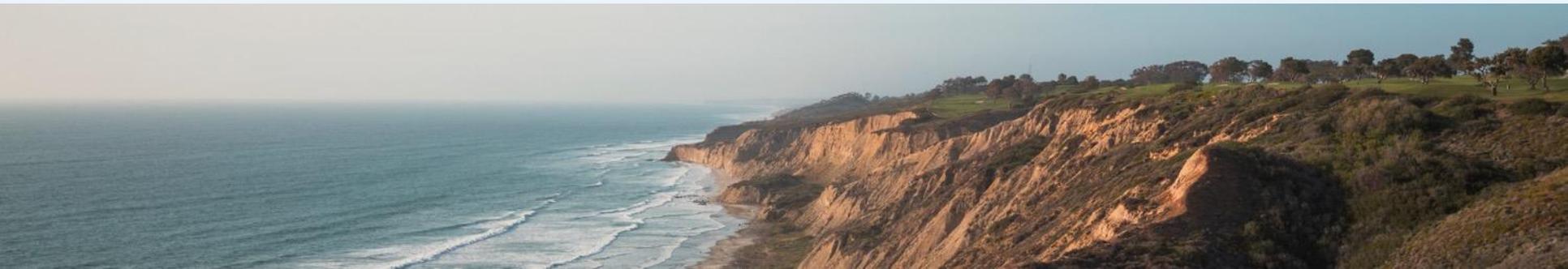
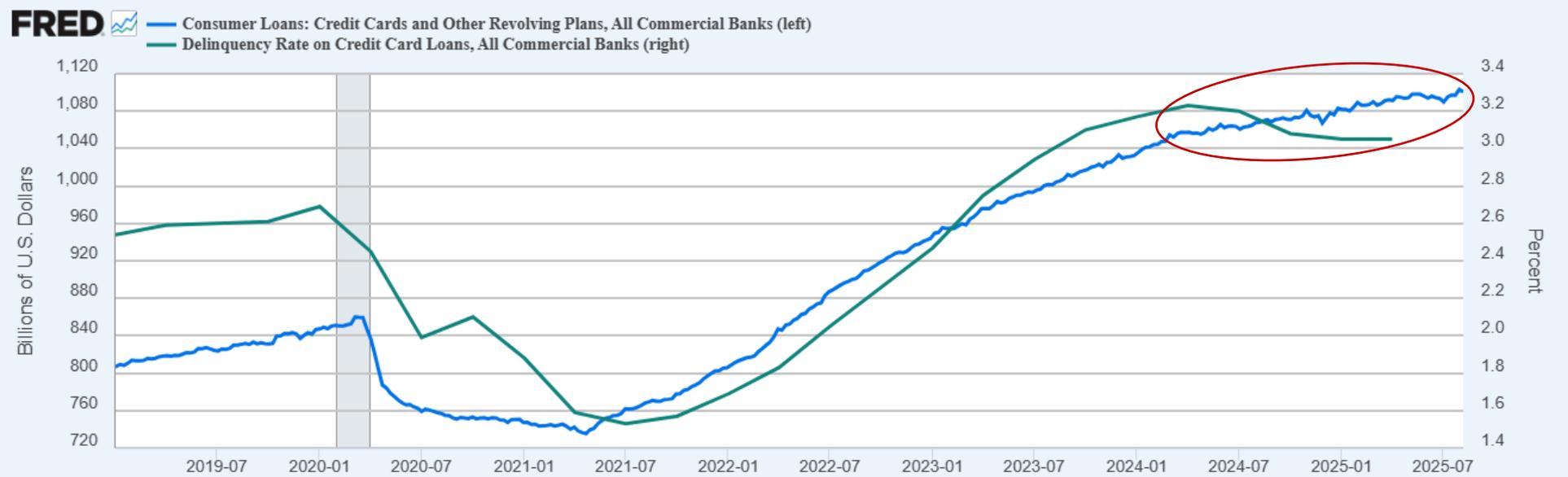
Note. Imports are a subtraction in the calculation of GDP; thus, a decrease in imports results in a positive contribution to GDP.
U.S. Bureau of Economic Analysis

Seasonally adjusted annual rates



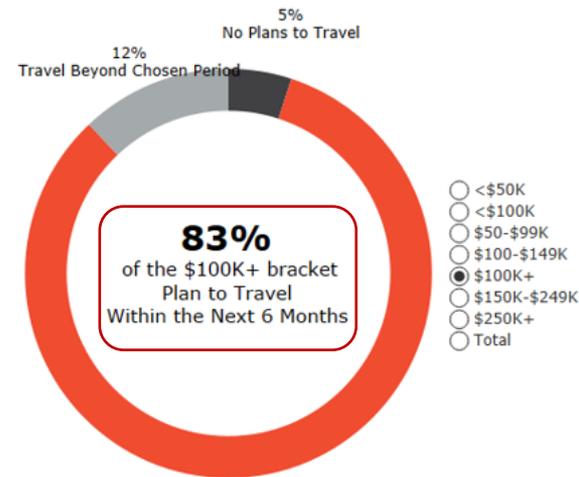
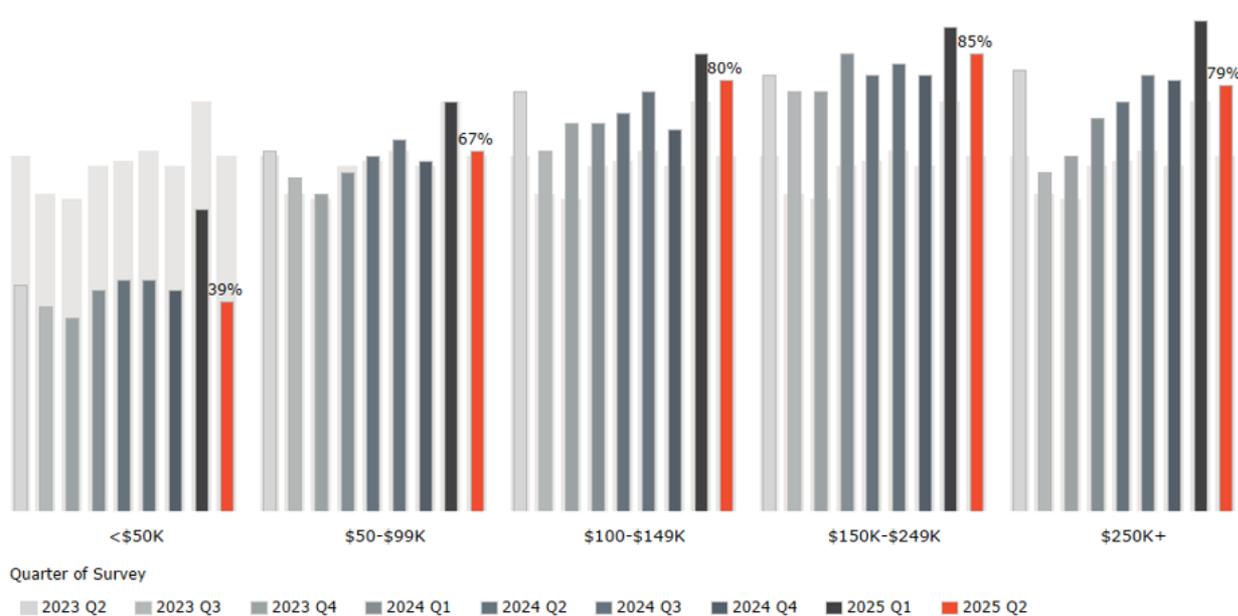
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Consumers Slow Credit Purchases



Affluent, Luxury Travelers Expect to Travel

Planning Leisure Travel Within the Next 6 Months
% of American Consumers



Light gray bars in the background represent the average for all survey respondents

International Card Activity

January - June 2025



	Spend Amount (vs. Previous Year)		Card Count (vs. Previous Year)		Average Ticket (vs. Previous Year)		Spend per Card (vs. Previous Year)		Transaction Count (vs. Previous Year)	
Retail	\$138.4M	+10.9%	1.0M	+14.3%	\$98	-4.1%	\$138	-3.0%	1.4M	+15.7%
Other	\$74.5M	+2.5%	505.4K	+5.6%	\$83	-2.3%	\$147	-2.9%	897.1K	+5.0%
Restaurants & Dining	\$56.7M	+3.6%	713.6K	+7.9%	\$37	-1.7%	\$79	-4.0%	1.5M	+5.5%
Hotels & Lodging	\$37.7M	-5.5%	69.3K	-0.8%	\$405	-7.4%	\$544	-4.8%	93.3K	+2.0%
Transportation	\$21.5M	-2.2%	320.5K	+13.7%	\$43	-17.5%	\$67	-14.0%	498.9K	+18.5%
Entertainment	\$6.0M	-1.7%	65.2K	-2.0%	\$63	+1.2%	\$92	+0.2%	94.6K	-2.9%

Spend Amount by Country

January - June 2025 (Click to filter)



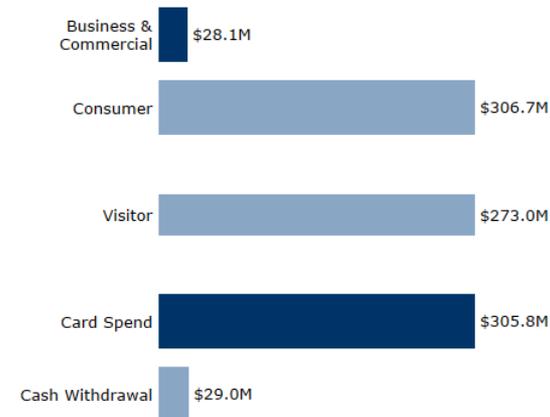
International % Change in Spend Amount

Jul 2024 - Jun 2025 vs. Previous Year

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	-0.89%	7.08%	8.69%	4.70%	5.59%	-9.84%	6.33%	-2.82%	-18.32%	4.79%	5.75%	-3.57%
Hotels & Lodging	0.75%	2.50%	2.45%	19.77%	22.68%	7.02%	3.82%	-9.62%	-27.19%	-25.21%	65.43%	-28.57%
Other	11.93%	10.13%	7.98%	15.75%	12.30%	5.17%	6.96%	-3.26%	-1.32%	3.28%	4.36%	4.98%
Restaurants & Dining	10.02%	16.05%	19.02%	17.66%	18.67%	12.18%	12.12%	-1.07%	-9.91%	-1.65%	28.88%	-4.00%
Retail	13.24%	14.75%	13.64%	20.10%	20.36%	15.36%	13.96%	7.05%	-1.97%	17.38%	17.54%	11.38%
Transportation	7.35%	5.45%	4.12%	0.83%	10.16%	12.20%	7.37%	0.53%	-15.65%	-0.69%	-4.43%	1.71%

Spend Amount

January - June 2025 (Click to filter)



International Share in Spend Amount

Jul 2024 - Jun 2025

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	2.8%	2.6%	1.8%	1.7%	1.4%	1.4%	1.8%	1.7%	1.8%	2.0%	1.6%	1.8%
Hotels & Lodging	12.0%	10.7%	10.4%	13.7%	9.0%	6.8%	9.6%	9.9%	10.2%	9.8%	16.4%	10.4%
Other	20.5%	21.5%	23.4%	22.1%	21.8%	21.0%	24.3%	23.9%	23.4%	21.4%	19.2%	22.2%
Restaurants & Dining	17.8%	17.9%	17.4%	17.2%	14.0%	13.7%	16.3%	16.8%	16.7%	17.3%	17.7%	16.6%
Retail	39.8%	39.4%	39.9%	38.9%	48.0%	51.9%	40.8%	41.0%	41.4%	42.8%	39.6%	42.6%
Transportation	7.1%	7.9%	7.1%	6.4%	5.8%	5.2%	7.2%	6.7%	6.4%	6.6%	5.4%	6.4%

International Card Activity

January - June 2025



	Spend Amount (vs. Previous Year)		Card Count (vs. Previous Year)		Average Ticket (vs. Previous Year)		Spend per Card (vs. Previous Year)		Transaction Count (vs. Previous Year)	
Retail	\$92.8M	+12.9%	686.1K	+22.1%	\$96	-8.1%	\$135	-7.6%	966.6K	+22.8%
Other	\$33.5M	+7.3%	291.7K	+17.8%	\$76	-6.7%	\$115	-8.9%	439.2K	+15.0%
Restaurants & Dining	\$16.4M	+27.4%	318.7K	+29.3%	\$32	-1.5%	\$51	-1.4%	514.5K	+29.4%
Transportation	\$10.5M	+5.8%	180.1K	+24.9%	\$39	-17.4%	\$58	-15.2%	266.8K	+28.2%
Hotels & Lodging	\$4.0M	+1.6%	14.5K	+11.6%	\$224	-9.3%	\$275	-8.9%	17.8K	+12.0%
Entertainment	\$1.8M	+14.3%	23.9K	+19.2%	\$53	-2.4%	\$75	-4.1%	33.6K	+17.1%

Spend Amount by Country

January - June 2025 (Click to filter)



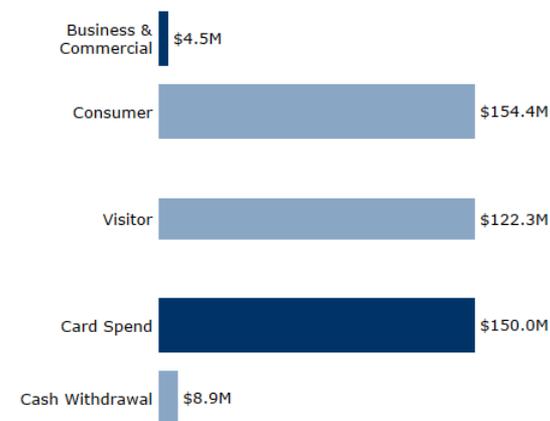
International % Change in Spend Amount

Jul 2024 - Jun 2025 vs. Previous Year

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	8.68%	0.48%	5.56%	-6.73%	1.85%	-14.89%	3.12%	10.55%	-33.46%	48.55%	33.30%	32.50%
Hotels & Lodging	0.07%	10.52%	2.14%	-0.21%	3.48%	-0.63%	-8.00%	-16.38%	-28.70%	26.10%	20.40%	19.49%
Other	20.71%	14.86%	8.92%	13.65%	11.57%	10.70%	12.24%	2.94%	0.67%	12.54%	8.03%	7.85%
Restaurants & Dining	26.85%	27.89%	27.09%	20.47%	27.85%	27.64%	29.90%	19.80%	-4.31%	52.86%	41.80%	29.76%
Retail	19.27%	16.97%	13.92%	20.70%	22.30%	19.11%	18.17%	11.98%	-0.98%	24.22%	11.94%	13.66%
Transportation	17.93%	12.31%	18.52%	8.09%	16.01%	18.36%	15.09%	9.62%	-13.28%	15.17%	-3.56%	14.49%

Spend Amount

January - June 2025 (Click to filter)



International Share in Spend Amount

Jul 2024 - Jun 2025

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	1.8%	1.7%	1.0%	0.9%	0.7%	0.8%	1.0%	0.8%	0.9%	1.5%	1.2%	1.3%
Hotels & Lodging	3.3%	3.3%	2.7%	2.2%	1.8%	1.7%	2.6%	1.7%	2.2%	2.8%	2.6%	2.9%
Other	20.7%	20.9%	21.6%	21.9%	19.3%	18.0%	22.1%	22.3%	22.0%	19.3%	20.5%	20.8%
Restaurants & Dining	11.1%	10.9%	10.3%	9.2%	7.4%	7.9%	9.9%	9.2%	9.7%	11.1%	10.6%	11.0%
Retail	55.9%	55.8%	57.0%	59.0%	65.5%	66.8%	57.1%	59.3%	59.1%	58.6%	59.1%	57.4%
Transportation	7.2%	7.4%	7.4%	6.8%	5.3%	4.8%	7.4%	6.7%	6.1%	6.8%	6.0%	6.5%

International Card Activity

January - June 2025



	Spend Amount (vs. Previous Year)		Card Count (vs. Previous Year)		Average Ticket (vs. Previous Year)		Spend per Card (vs. Previous Year)		Transaction Count (vs. Previous Year)	
Restaurants & Dining	\$9.6M	-21.4%	88.5K	-20.5%	\$47	-0.4%	\$109	-1.1%	205.9K	-21.1%
Hotels & Lodging	\$9.0M	-24.3%	14.3K	-18.9%	\$457	-10.3%	\$626	-6.7%	19.7K	-15.7%
Retail	\$6.1M	-19.0%	64.7K	-17.8%	\$75	-2.1%	\$94	-1.5%	80.9K	-17.3%
Other	\$5.1M	-19.2%	41.9K	-20.1%	\$71	-2.6%	\$122	+1.1%	72.4K	-17.1%
Transportation	\$2.9M	-19.4%	33.9K	-14.1%	\$62	-9.0%	\$85	-6.2%	46.6K	-11.5%
Entertainment	\$1.2M	-19.8%	12.9K	-23.6%	\$64	+6.3%	\$95	+5.0%	19.3K	-24.5%

Spend Amount by Country

January - June 2025 (Click to filter)



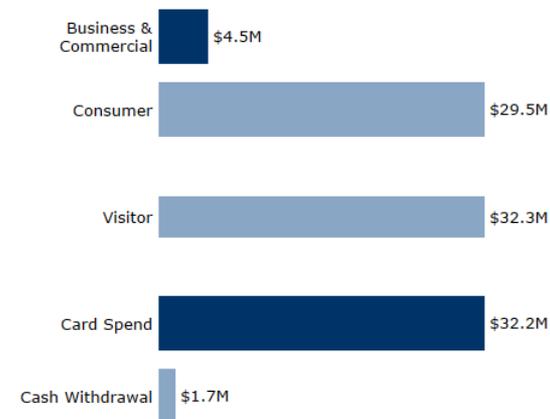
International % Change in Spend Amount

Jul 2024 - Jun 2025 vs. Previous Year

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	0.09%	14.32%	5.41%	1.23%	3.74%	-7.58%	-11.34%	-9.29%	-19.09%	-22.84%	-25.61%	-37.32%
Hotels & Lodging	11.15%	-3.89%	-5.57%	-8.90%	9.23%	6.09%	5.11%	-18.29%	-36.38%	-46.11%	2.68%	-34.51%
Other	6.75%	3.46%	-2.83%	-1.88%	-4.62%	-6.19%	1.39%	-24.55%	-24.94%	-26.91%	-21.04%	-19.84%
Restaurants & Dining	2.42%	15.76%	7.20%	-5.84%	8.45%	3.26%	-1.99%	-15.46%	-20.83%	-40.99%	-11.25%	-29.73%
Retail	11.75%	13.62%	9.32%	-1.74%	18.79%	9.40%	-6.25%	-18.72%	-21.82%	-29.33%	-21.91%	-10.97%
Transportation	-4.76%	9.28%	-7.84%	-11.14%	-0.22%	7.91%	-6.93%	-11.27%	-23.68%	-27.91%	-22.91%	-23.03%

Spend Amount

January - June 2025 (Click to filter)



International Share in Spend Amount

Jul 2024 - Jun 2025

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Entertainment	3.7%	4.1%	2.9%	3.2%	3.7%	3.5%	3.1%	3.7%	4.7%	4.2%	3.0%	2.5%
Hotels & Lodging	29.9%	23.3%	26.8%	30.1%	24.9%	22.1%	25.8%	24.2%	23.9%	25.3%	32.4%	29.3%
Other	12.4%	13.1%	14.0%	12.8%	14.4%	17.1%	19.3%	14.8%	15.0%	13.9%	12.4%	14.0%
Restaurants & Dining	26.8%	29.0%	28.8%	27.8%	27.0%	26.7%	26.2%	30.4%	28.6%	29.7%	28.4%	26.6%
Retail	18.7%	20.4%	19.5%	17.9%	21.4%	22.4%	17.1%	18.2%	18.2%	18.2%	16.7%	19.6%
Transportation	8.5%	10.1%	8.0%	8.2%	8.6%	8.1%	8.5%	8.8%	9.5%	8.7%	7.1%	7.9%



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Recent Market Performance

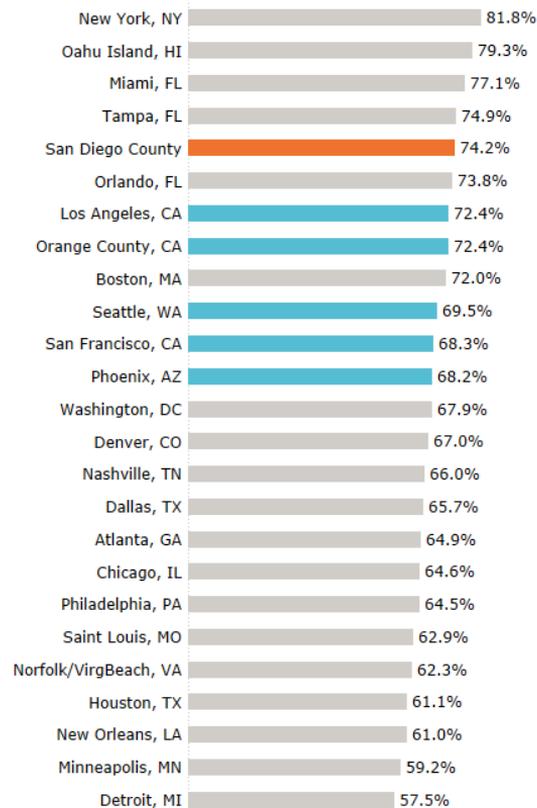


STR Lodging Performance Snapshot

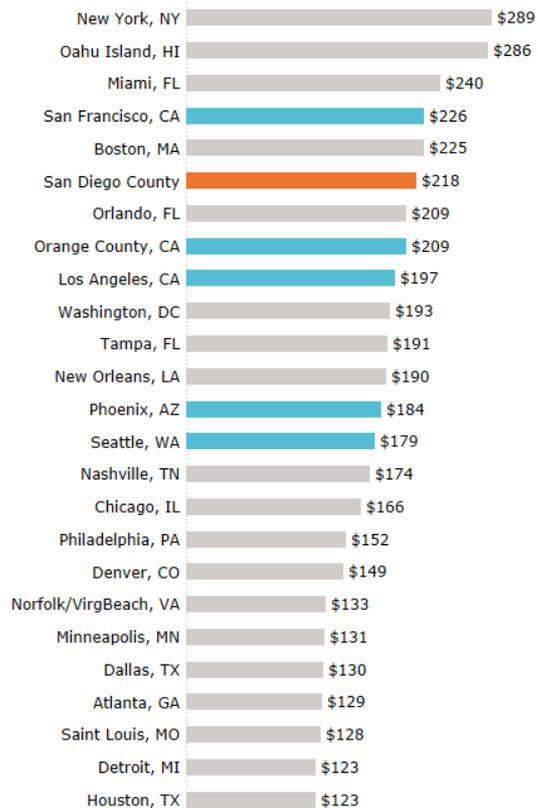
CYTD July 2025



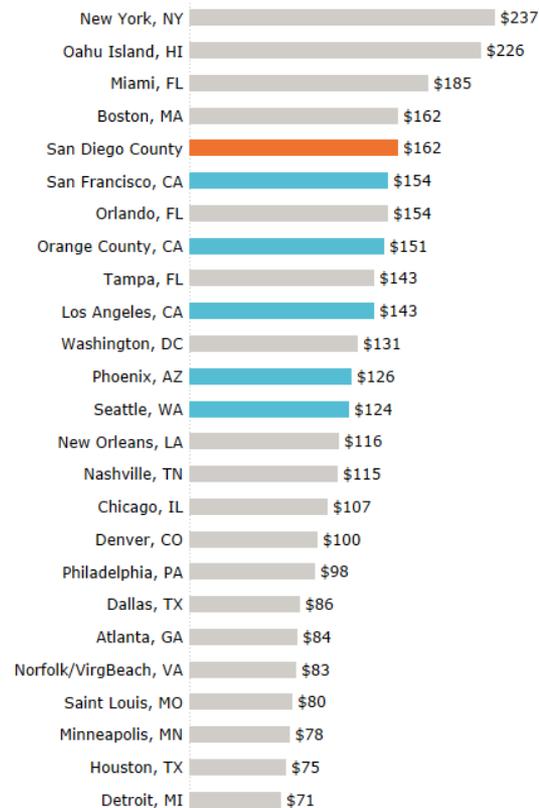
Top 25 Markets Occupancy



Top 25 Markets ADR



Top 25 Markets RevPAR

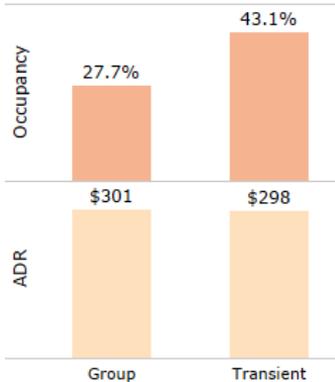


San Diego Calendar Year-to-Date July 2025 Performance

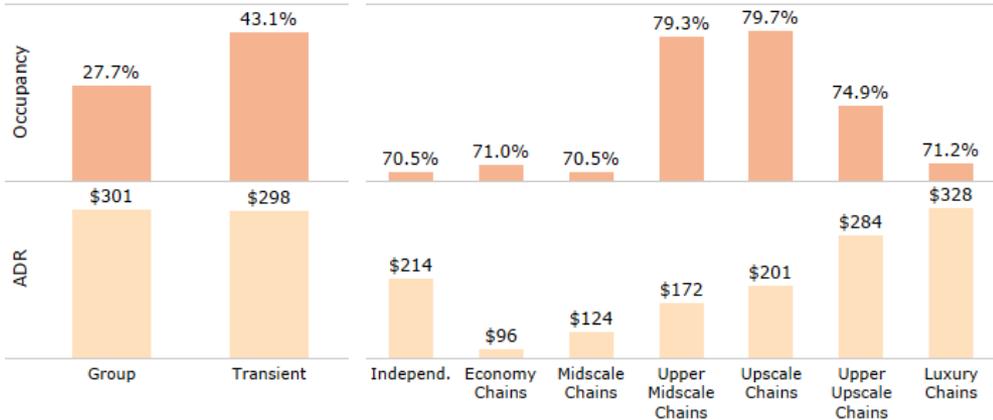
Tourism Marketing District Regions for Calendar Year-to-Date July 2025

	% Occupancy	ADR	RevPAR	RN Supply	RN Demand
San Diego County	74.2%	\$218	\$162	13.9M	10.3M
City of San Diego	75.7%	\$222	\$168	8.5M	6.4M
Downtown	75.5%	\$260	\$196	3.2M	2.4M
Mission Valley	74.9%	\$163	\$122	1.7M	1.3M
Mission Bay	74.9%	\$251	\$188	671.6K	502.8K
La Jolla Coastal	73.0%	\$332	\$242	385.0K	281.0K
UTC	78.0%	\$223	\$174	881.5K	687.5K
I-15 Corridor	76.4%	\$178	\$136	385.8K	294.9K

Group/Transient - Upscale+



Hotel Chain Scale Performance



Source: STR

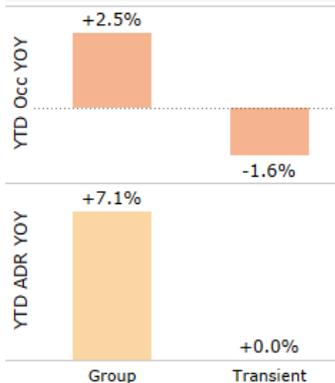
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San Diego Calendar Year-to-Date July 2025 Performance YOY

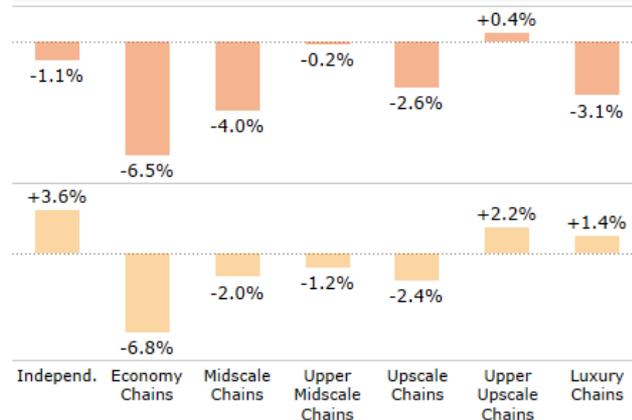
Tourism Marketing District Regions YOY for Calendar Year-to-Date July 2025

	% Occupancy	ADR	RevPAR	RN Supply	RN Demand
San Diego County	-1.5%	+1.7%	+0.1%	+1.7%	+0.2%
City of San Diego	-1.5%	-0.3%	-1.8%	+0.6%	-0.9%
Downtown	-2.1%	+0.5%	-1.6%	+0.0%	-2.1%
Mission Valley	-4.1%	-0.4%	-4.5%	+2.7%	-1.5%
Mission Bay	+0.8%	-3.2%	-2.5%	+0.0%	+0.8%
La Jolla Coastal	+2.7%	-0.8%	+1.9%	+0.1%	+2.7%
UTC	+0.4%	-0.5%	-0.1%	+0.0%	+0.4%
I-15 Corridor	+0.3%	-2.3%	-2.0%	+0.0%	+0.4%

Group/Transient - Upscale+



Hotel Chain Scale Performance



Source: STR

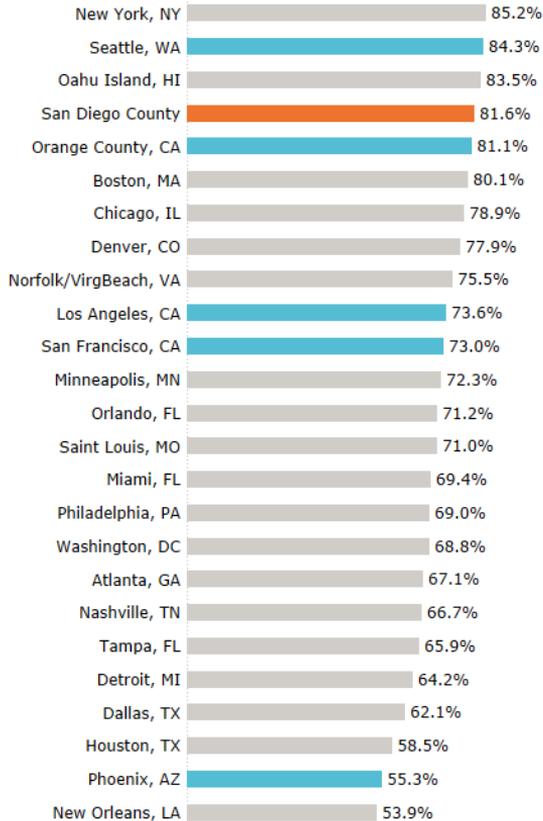
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STR Lodging Performance Snapshot

July 2025



Top 25 Markets Occupancy



Top 25 Markets ADR



Top 25 Markets RevPAR



San Diego July 2025 Performance YOY

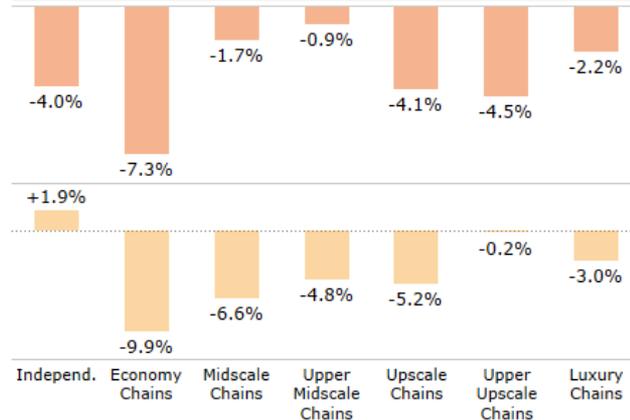
Tourism Marketing District Regions YOY for July 2025

	% Occupancy	ADR	RevPAR	RN Supply	RN Demand
San Diego County	-3.7%	-1.1%	-4.8%	+3.4%	-0.4%
City of San Diego	-2.9%	-3.7%	-6.5%	+1.2%	-1.8%
Downtown	-3.2%	-2.4%	-5.5%	-0.3%	-3.5%
Mission Valley	-4.5%	-5.7%	-9.9%	+3.7%	-0.9%
Mission Bay	-1.8%	-6.3%	-7.9%	+0.0%	-1.8%
La Jolla Coastal	+0.4%	-1.1%	-0.7%	+0.0%	+0.4%
UTC	-0.7%	-2.9%	-3.6%	+0.0%	-0.7%
I-15 Corridor	+2.6%	-2.8%	-0.3%	+0.0%	+2.6%

Group/Transient - Upscale+



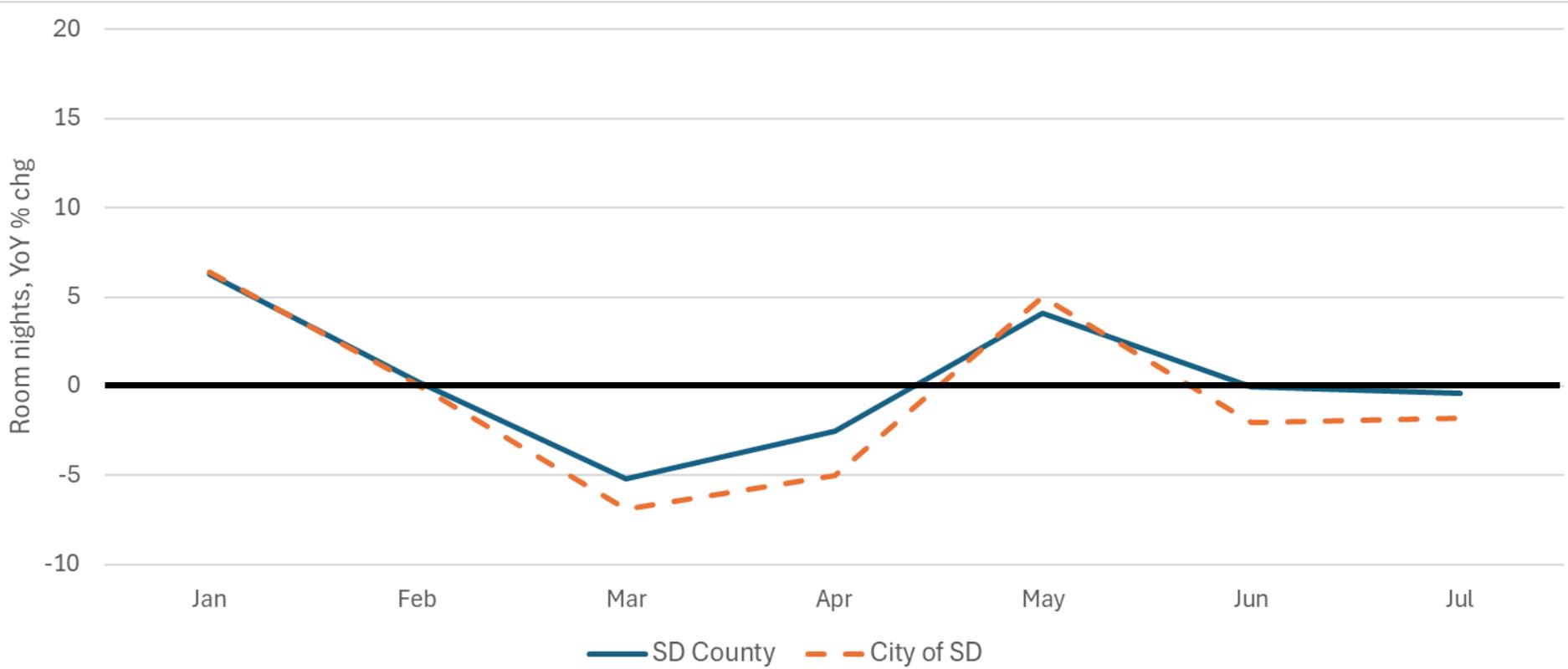
Hotel Chain Scale Performance



Source: STR

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City of SD Falling Behind County





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Outlook



Hotel Forecast

San Diego, CA - Total Segment Summary



As of Date
July 2025

Geography
San Diego, CA - Total Segment

Indicator Levels

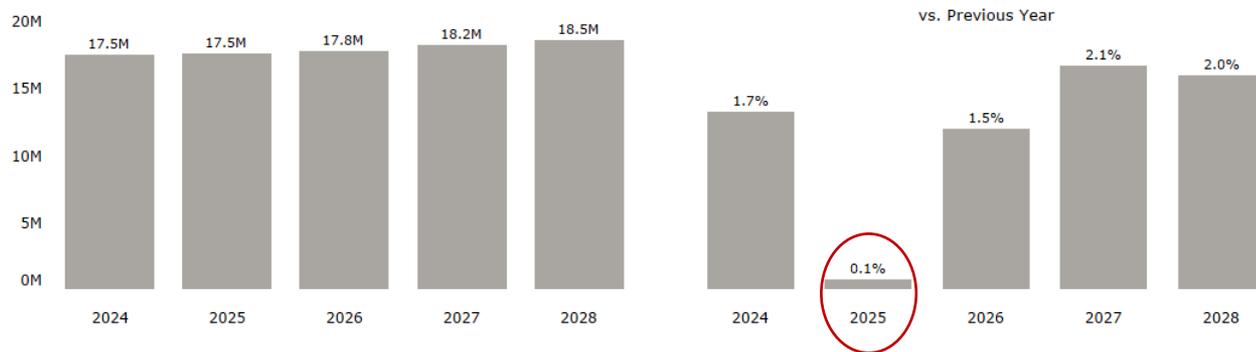
	2024	2025	2026	2027	2028
Occupancy	74.2%	72.7%	72.4%	73.2%	73.5%
ADR	\$212	\$213	\$214	\$219	\$223
Rev PAR	\$158	\$155	\$155	\$160	\$164
Supply	23,591.5K	24,105.3K	24,591.3K	24,840.9K	25,247.6K
Demand	17,513.1K	17,530.3K	17,798.9K	18,177.6K	18,547.9K
Revenue	\$3,721.4M	\$3,735.4M	\$3,815.2M	\$3,978.7M	\$4,132.6M

% Change vs. Previous Year

	2024	2025	2026	2027	2028
Occupancy	1.1%	-2.0%	-0.5%	1.1%	0.4%
ADR	1.2%	0.3%	0.6%	2.1%	1.8%
RevPAR	2.3%	-1.8%	0.1%	3.2%	2.2%
Supply	0.6%	2.2%	2.0%	1.0%	1.6%
Demand	1.7%	0.1%	1.5%	2.1%	2.0%
Revenue	2.9%	0.4%	2.1%	4.3%	3.9%

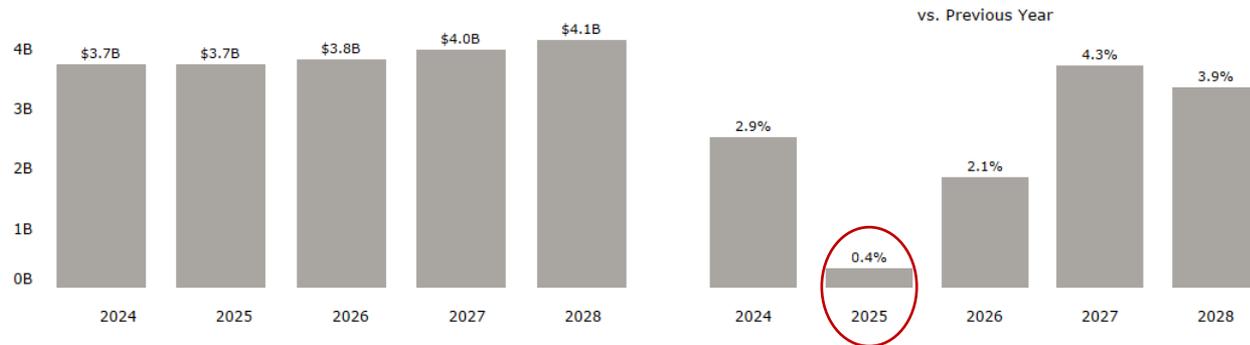
Room Demand

San Diego, CA - Total Segment



Room Revenue

San Diego, CA - Total Segment



Four Quarters of Weakness Expected

Quarterly

San Diego, CA - Total Segment

		Occupancy	ADR	RevPAR	Supply	Demand	Revenue
2025	Q1	69.5%	\$199	\$138	5.8M	4.1M	\$806.6M
	Q2	76.1%	\$217	\$165	6.0M	4.6M	\$991.9M
	Q3	77.9%	\$238	\$185	6.1M	4.8M	\$1.1B
	Q4	67.4%	\$194	\$131	6.1M	4.1M	\$804.2M
2026	Q1	67.5%	\$197	\$133	6.0M	4.1M	\$799.5M
	Q2	75.0%	\$217	\$163	6.1M	4.6M	\$997.3M
	Q3	78.4%	\$240	\$188	6.2M	4.9M	\$1.2B
	Q4	68.6%	\$199	\$136	6.2M	4.3M	\$850.0M

Quarterly Relative to Previous Year

San Diego, CA - Total Segment, % Change to Previous Year

		Occupancy	ADR	RevPAR	Supply	Demand	Revenue
2025	Q1	-0.6%	2.1%	1.5%	0.6%	0.0%	2.1%
	Q2	-1.8%	1.7%	-0.1%	2.2%	0.4%	2.1%
	Q3	-3.1%	-0.7%	-3.8%	3.1%	-0.2%	-0.9%
	Q4	-2.5%	-1.9%	-4.3%	2.8%	0.2%	-1.6%
2026	Q1	-2.9%	-1.0%	-3.9%	3.1%	0.1%	-0.9%
	Q2	-1.5%	0.1%	-1.3%	1.9%	0.4%	0.5%
	Q3	0.7%	1.0%	1.6%	1.5%	2.2%	3.1%
	Q4	1.8%	2.2%	4.0%	1.6%	3.4%	5.7%

Hotel Forecast

San Diego, CA - Total Segment - Forecast Comparison



As of Date: July 2025
 Comparison: January 2025
 Geography: San Diego, CA - Total Segment
 Time Period: Annual

Annual Comparison: Room Demand

Primary: July 2025; Comparison: January 2025

		2024	2025	2026	2027	2028
Baseline	January 2025	17.5M	18.0M	18.6M	18.9M	19.1M
	July 2025	17.5M	17.5M	17.8M	18.2M	18.5M
	% diff	0%	-2%	-4%	-4%	-3%

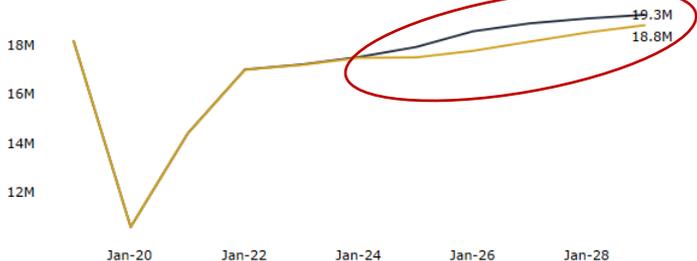
Annual Comparison: Room Demand

Primary: July 2025; Comparison: January 2025

	January 2025	July 2025	% diff
2019	18.2M	18.2M	0%
2020	10.6M	10.6M	0%
2021	14.4M	14.4M	0%
2022	17.0M	17.0M	0%
2023	17.2M	17.2M	0%
2024	17.5M	17.5M	0%
2025	18.0M	17.5M	-2%
2026	18.6M	17.8M	-4%
2027	18.9M	18.2M	-4%
2028	19.1M	18.5M	-3%
2029	19.3M	18.8M	-2%

Annual Room Demand

Primary: July 2025; Comparison: January 2025



On-the-Books Occupancy by Subregion

Segment: All | Group: Sold & Unsold (combined)

	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
San Diego	65%	47%	32%	19%	22%	28%
Downtown	73%	57%	43%	25%	31%	41%
I-15 Corridor	50%	36%	20%	14%	8%	11%
Chula Vista	52%	43%	32%	26%	45%	53%
La Jolla Coastal	68%	45%	23%	13%	14%	15%
Mission Bay	65%	54%	40%	13%	19%	28%
Mission Valley	55%	28%	17%	9%	9%	9%
Pt Loma	71%	49%	33%	15%	13%	17%
UTC	63%	41%	21%	12%	9%	11%

On-the-Books Room Nights by Subregion

Segment: All | Group: Sold & Unsold (combined)

	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
San Diego	672.6K	500.1K	334.2K	200.6K	240.5K	271.5K
Downtown	314.4K	253.7K	184.2K	111.2K	138.1K	162.8K
I-15 Corridor	24.1K	17.7K	9.7K	6.7K	3.9K	5.0K
Chula Vista	38.8K	33.1K	23.7K	19.9K	35.0K	37.3K
La Jolla Coastal	39.2K	26.9K	13.2K	7.6K	8.3K	8.0K
Mission Bay	33.6K	28.7K	20.4K	7.1K	10.3K	13.2K
Mission Valley	91.0K	48.2K	28.2K	15.3K	16.0K	14.2K
Pt Loma	24.1K	17.1K	11.3K	5.3K	4.7K	5.3K
UTC	98.9K	66.0K	33.5K	19.4K	15.2K	16.1K

YOY Difference in On-the-Books Occupancy by Subregion

Segment: All | Group: Sold & Unsold (combined)

	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
San Diego	-2.8% pt	+0.3% pt	+2.6% pt	-3.4% pt	+3.8% pt	+6.8% pt
Downtown	-2.6% pt	-4.2% pt	-2.5% pt	-7.1% pt	-0.3% pt	+2.9% pt
I-15 Corridor	-6.6% pt	+0.1% pt	+3.9% pt	+2.3% pt	+2.4% pt	+2.6% pt
Chula Vista	-4.5% pt	+31.7% pt	+26.1% pt	+23.1% pt	+44.7% pt	+52.9% pt
La Jolla Coastal	-4.5% pt	-1.1% pt	-0.3% pt	-3.1% pt	-2.7% pt	+5.9% pt
Mission Bay	-6.3% pt	-5.8% pt	+2.8% pt	-11.3% pt	+3.1% pt	+8.4% pt
Mission Valley	-5.9% pt	-3.4% pt	+1.8% pt	-6.5% pt	+1.4% pt	+0.2% pt
Pt Loma	+0.8% pt	-5.0% pt	+3.1% pt	-13.4% pt	-0.2% pt	+4.6% pt
UTC	-1.9% pt	-0.9% pt	+0.4% pt	-2.6% pt	-1.6% pt	+2.1% pt

YOY % Change in On-the-Books Room Nights by Subregion

Segment: All | Group: Sold & Unsold (combined)

	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
San Diego	+1.2%	+1.7%	+9.7%	-14.6%	+21.1%	+32.2%
Downtown	-1.1%	-4.5%	-3.3%	-20.1%	+1.0%	+7.7%
I-15 Corridor	-11.6%	+0.1%	+24.3%	+20.0%	+43.8%	+30.2%
Chula Vista	+127.1%	+291.3%	+479.8%	+943.6%	+16,410.8%	+42,258.0%
La Jolla Coastal	-6.2%	-2.5%	-1.4%	-19.4%	-16.4%	+66.9%
Mission Bay	-8.8%	-9.7%	+7.7%	-45.9%	+19.3%	+44.1%
Mission Valley	-9.7%	-10.7%	+11.7%	-42.4%	+17.3%	+2.4%
Pt Loma	+1.1%	-9.3%	+10.5%	-46.8%	-1.8%	+38.8%
UTC	-3.0%	-2.2%	+2.1%	-18.2%	-14.9%	+23.0%

Weekly Outlook

Room Nights Booked for Downtown Compared to the Same Week in the Previous Year
All Booking Segments (Sold Rooms Only Group): All





TOURISM AUTHORITY

THANK YOU!

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