



State of the Tourism Industry Monthly Report

November 2025

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Executive Summary

November 2025

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Highlights

The state's hotel occupancy reached 55.4% in November, reflecting a 4.7% YOY decline and softening from October's peak of 61.6%. ADR also eased from October's high of \$140 to \$133.34, marking a 4.9% YOY decrease.

At the submarket level, Ouachita Parish recorded the highest occupancy at 67.1%, a 12.3% YOY growth. Most territories posted YOY increases in room supply, with the exception of the Louisiana North Area, Louisiana South Area, and Rapides Parish, which saw supply declines of 1.9%, 1.4%, and 4.0%, respectively. ADR varied widely across the state, ranging from a high of \$173 in New Orleans, down 3.7% YOY, to a low of \$93 in Lafayette, which still recorded modest growth of 0.2% YOY.

U.S. job growth has cooled but remains positive, with a three-month average of 75,000 private-sector jobs added. October's decline of 105,000 jobs was driven by a 162,000 drop in federal employment, while private-sector hiring rebounded in November with a gain of about 64,000.

Overseas travel to the US has weakened in 2025, with arrivals down 2.6% YTD through November and seven consecutive months of 3-8% YOY declines. Canadian travel has fallen sharply, with total visits down 25.7% YTD, driven by a 30.1% drop in land crossings and a 13.2% decline in air travel.

AAA projects 122.4 million Americans will travel over the year-end holidays, a 2.2% YOY increase surpassing 2024's record. Air travel volumes remain elevated, with TSA screening a record 3.1 million travelers on November 30 and eight of the 10 busiest days in TSA history occurring in 2025.



Hotel Demand
1.6M
-4.2% YOY



Hotel ADR
\$133.34
-4.9% YOY



Overnight Trip Share
77%



Hotel Occ Tax
\$1.5B
+2.0% YOY
(Year 2023)



MSY Checkpoint Volume
569.6K
-4.5% YOY



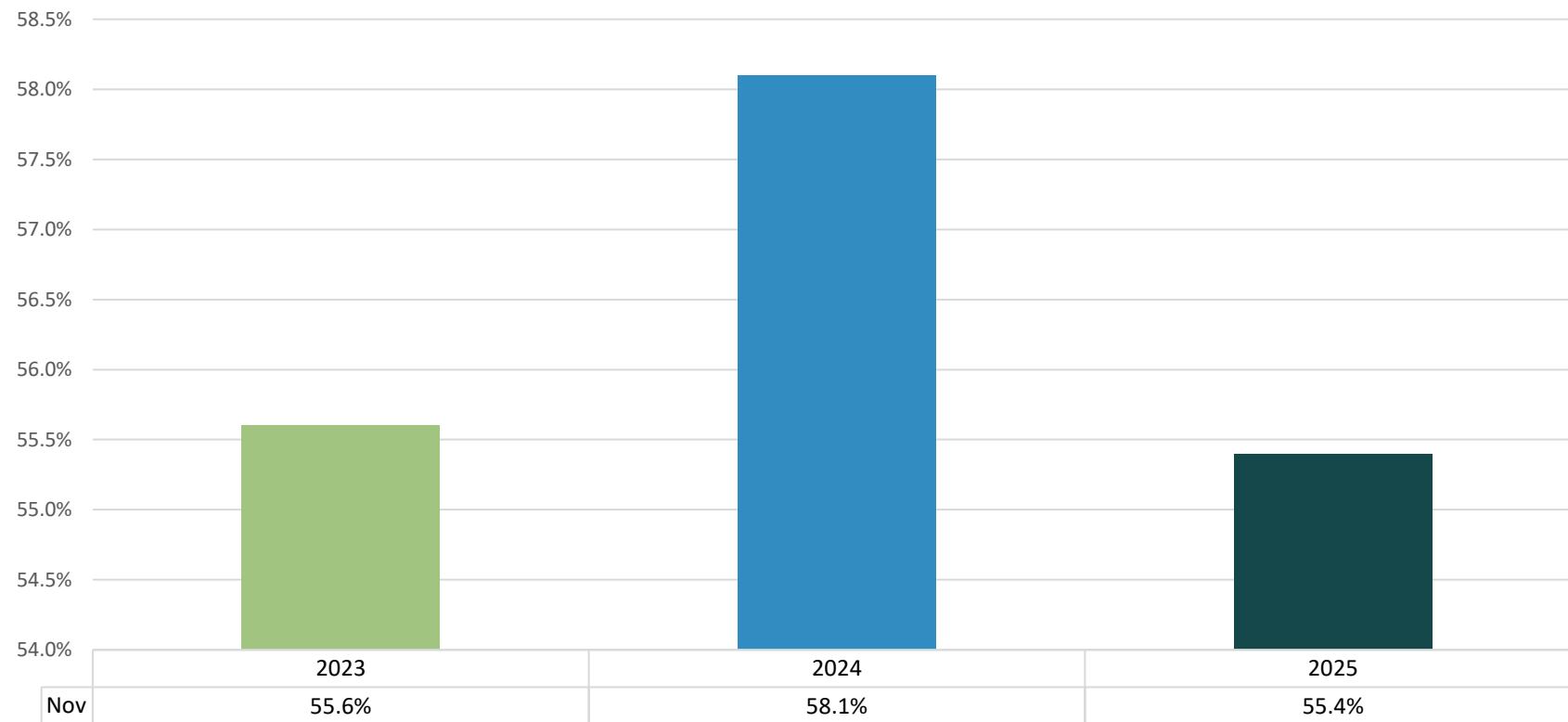
Website Sessions
371.5K
-5.8% YOY



L&H Jobs
41.1K
+4.6% YOY
(As of September 2025)

Louisiana Lodging

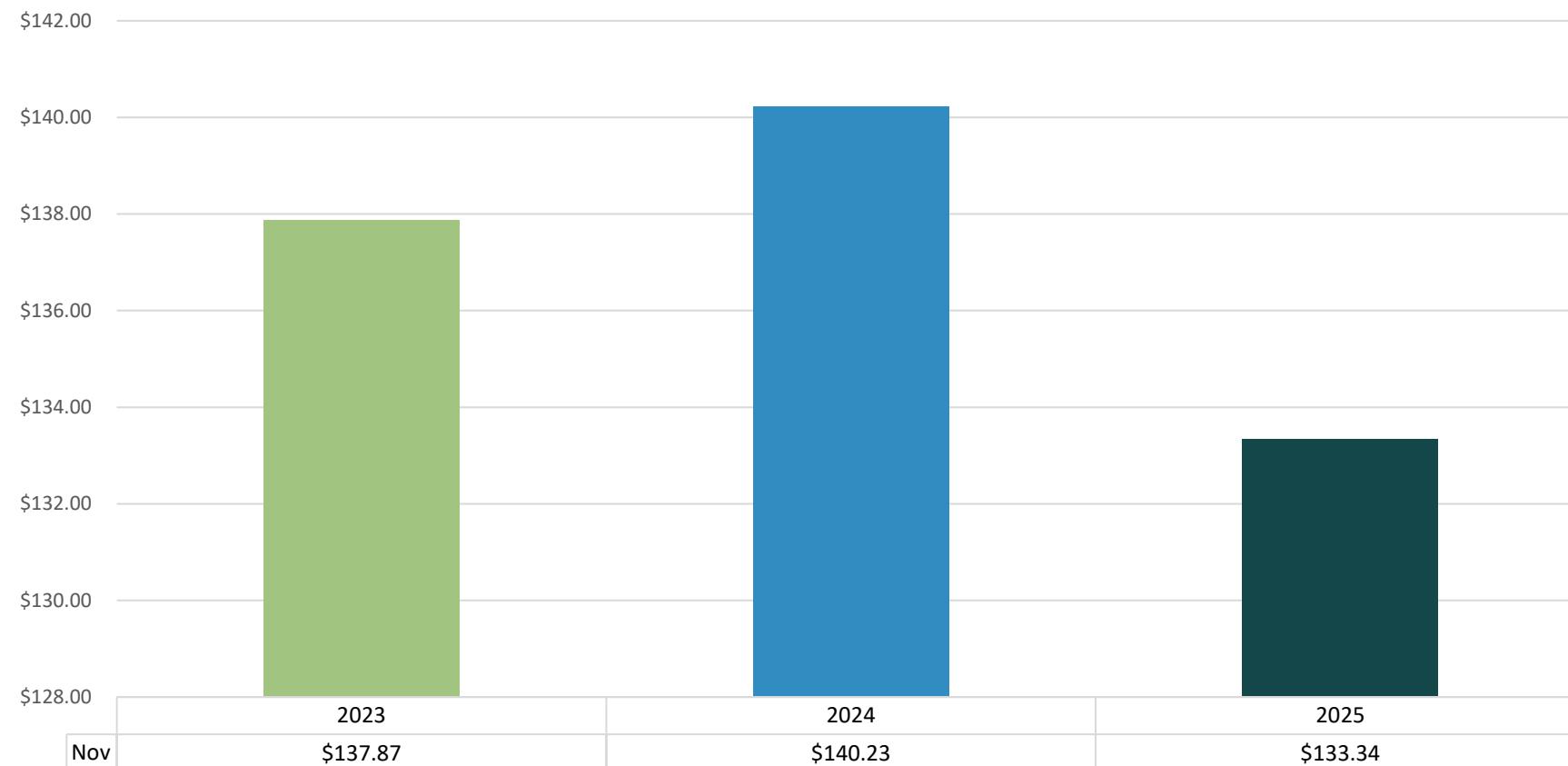
November Occupancy (%): Yr/Yr



- Louisiana's hotel occupancy decreased by 2.6% over November 2024.
- Since last month (October), occupancy was down 10.1%.

(Source: STR)

November ADR (\$): Yr/Yr

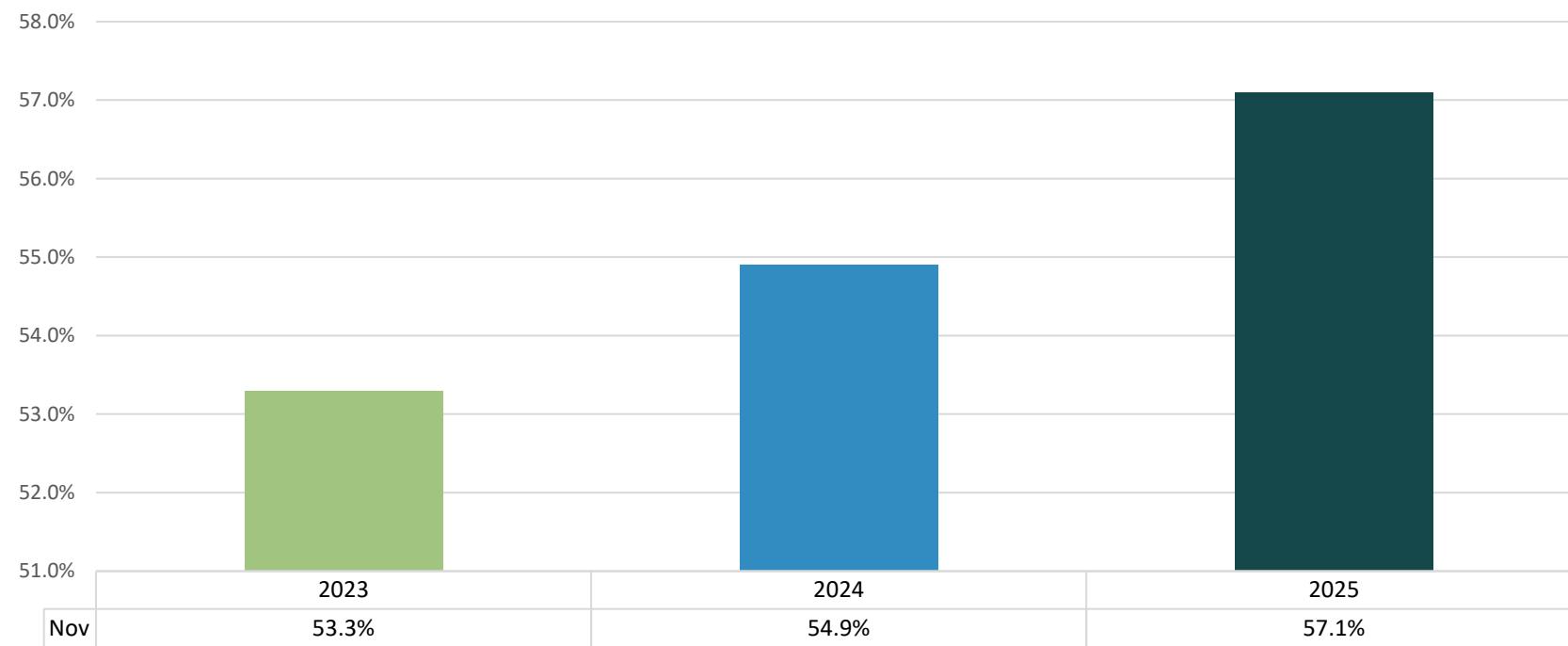


- Louisiana's average daily rates (ADR) decreased by 4.9% over November 2024.
- Since last month (October), ADR was down 4.7%.

(Source: STR)

Louisiana Lodging (without New Orleans)

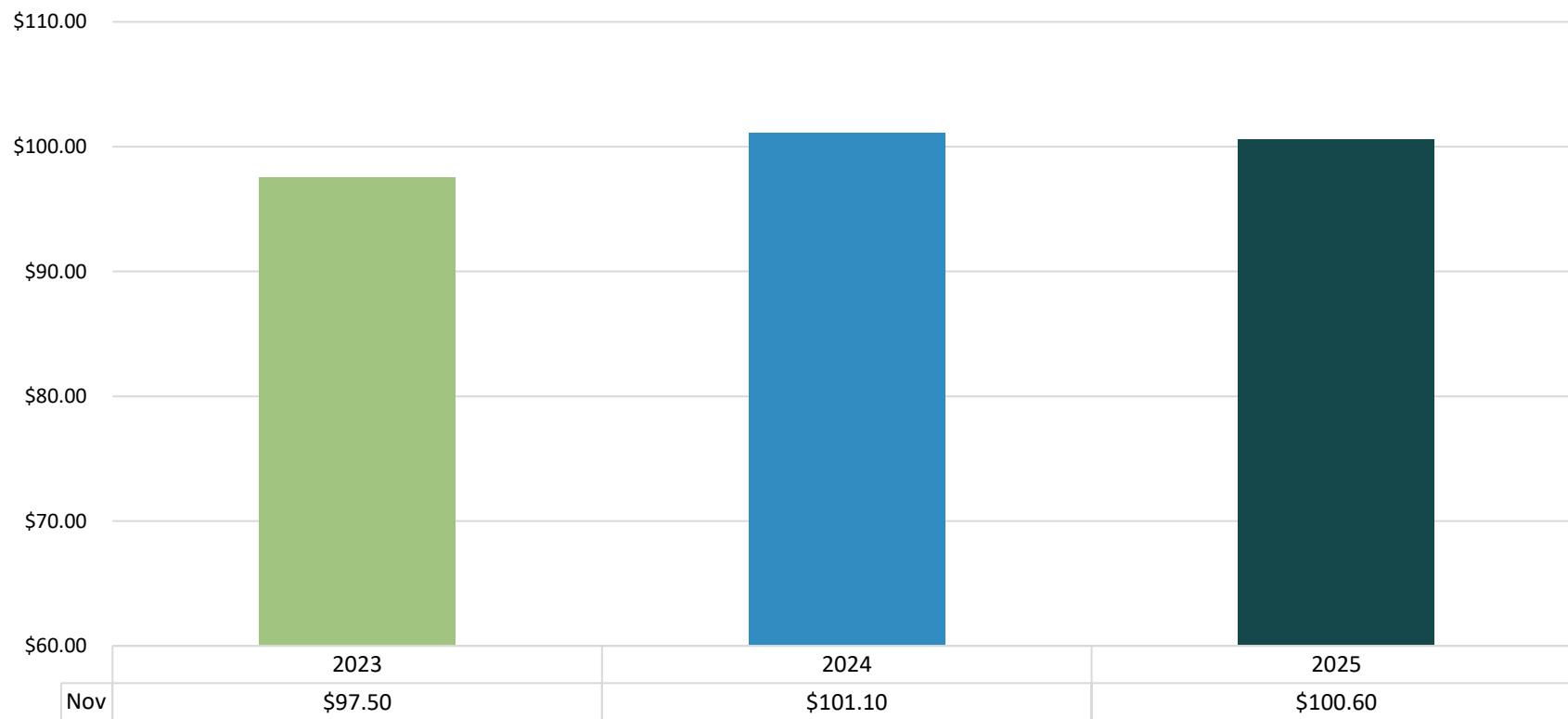
November Occupancy (%) without NOLA: Yr/Yr



- Louisiana's occupancy, excluding New Orleans, increased by 4% over November 2024.

New Orleans MSA includes Orleans, Jefferson, St. Tammany, St. Bernard, Plaquemines, St. John the Baptist, St. Charles, & St. James Parishes
(Source: STR)

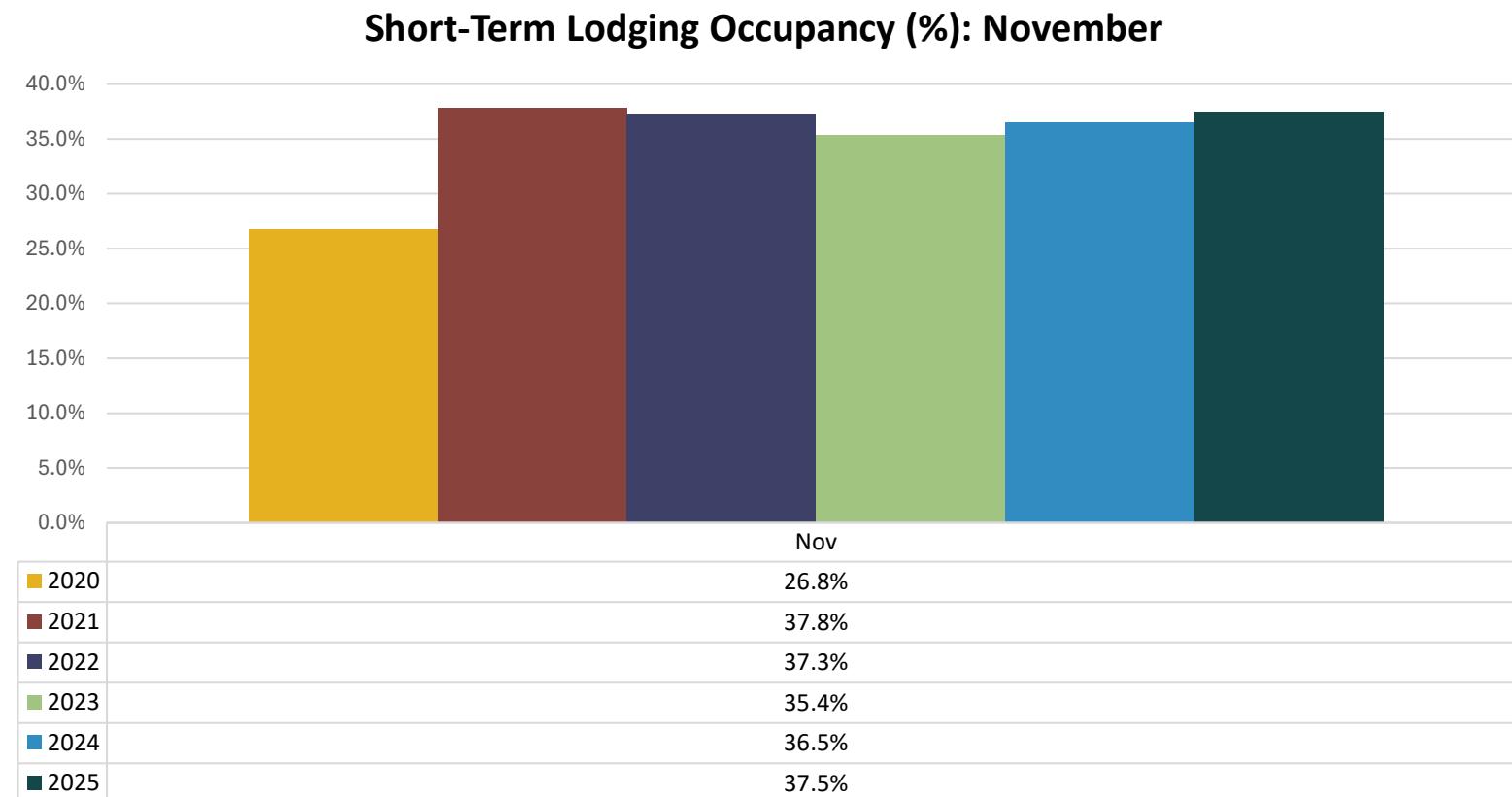
November ADR (\$) without NOLA: Yr/Yr



- Louisiana's ADR, excluding New Orleans, grew by 0.5% over November 2024.

(Source: STR)

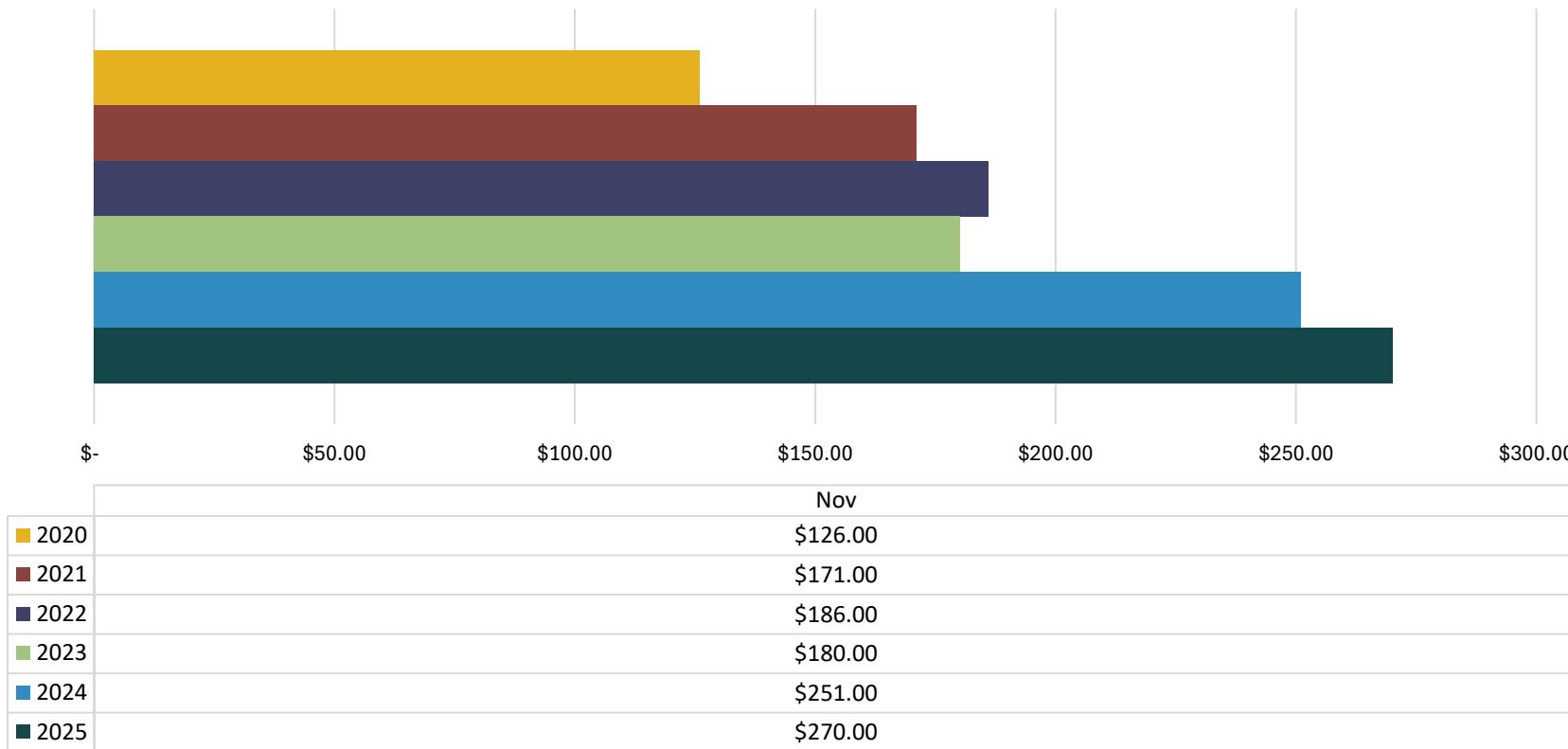
Louisiana Short-Term Lodging



- Louisiana's short-term lodging occupancy increased by 3% over November 2024.
- RevPAR increased 11% over last November.

(Source: KeyData)

Short-Term Lodging ADR (\$): November



- Louisiana's short-term lodging ADR grew 8% over November 2024.
- Louisiana's short-term lodging Revenue decreased by 8% over last November.

(Source: KeyData)

Louisiana Leisure & Hospitality Jobs

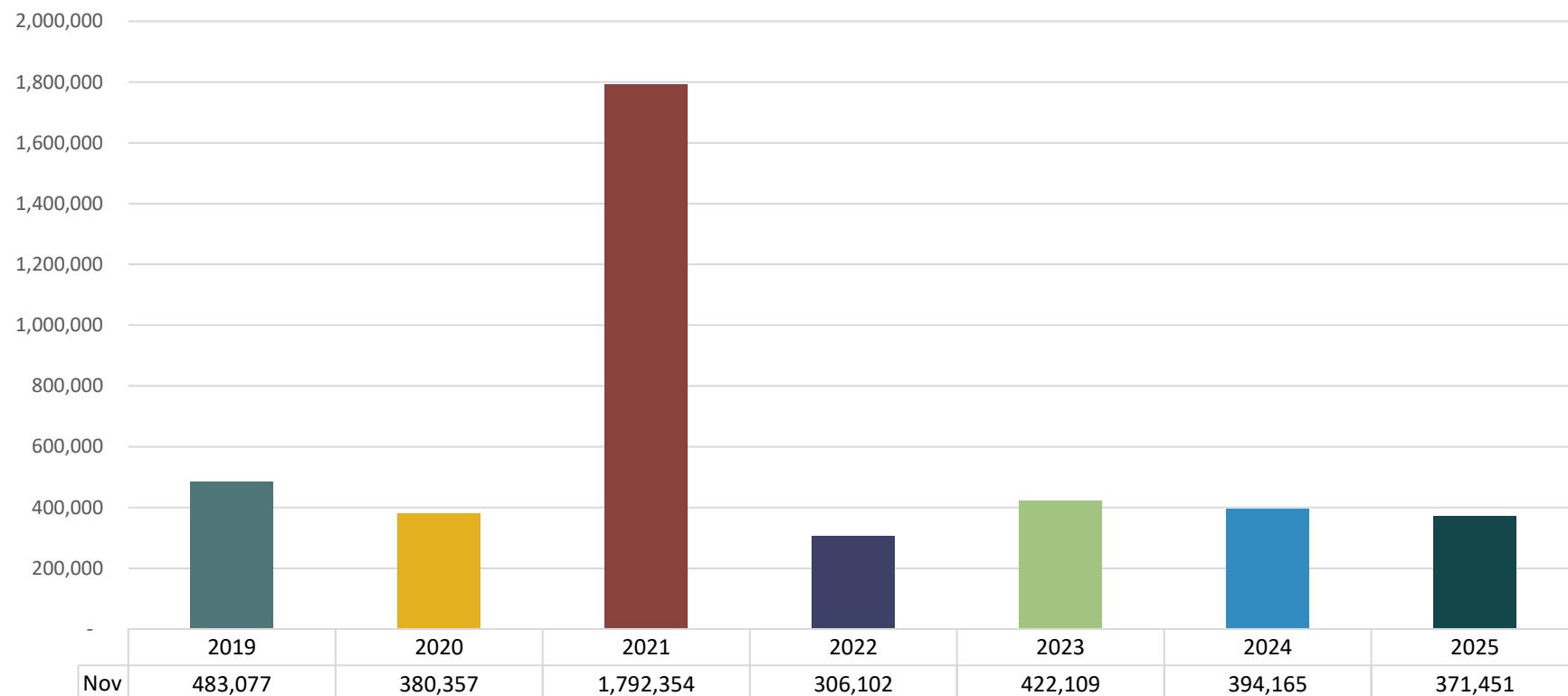


- Tourism jobs increased by 4.2% with a gain of 9,300 jobs over September 2024.
- Accommodations & Food Services jobs gained 7,400 jobs over last September.

[September jobs are preliminary & seasonally adjusted.] {Jobs data is delayed due to “lapse in government services.”} (Source: BLS)

ExploreLouisiana.com

November Website Visits: Yr/Yr

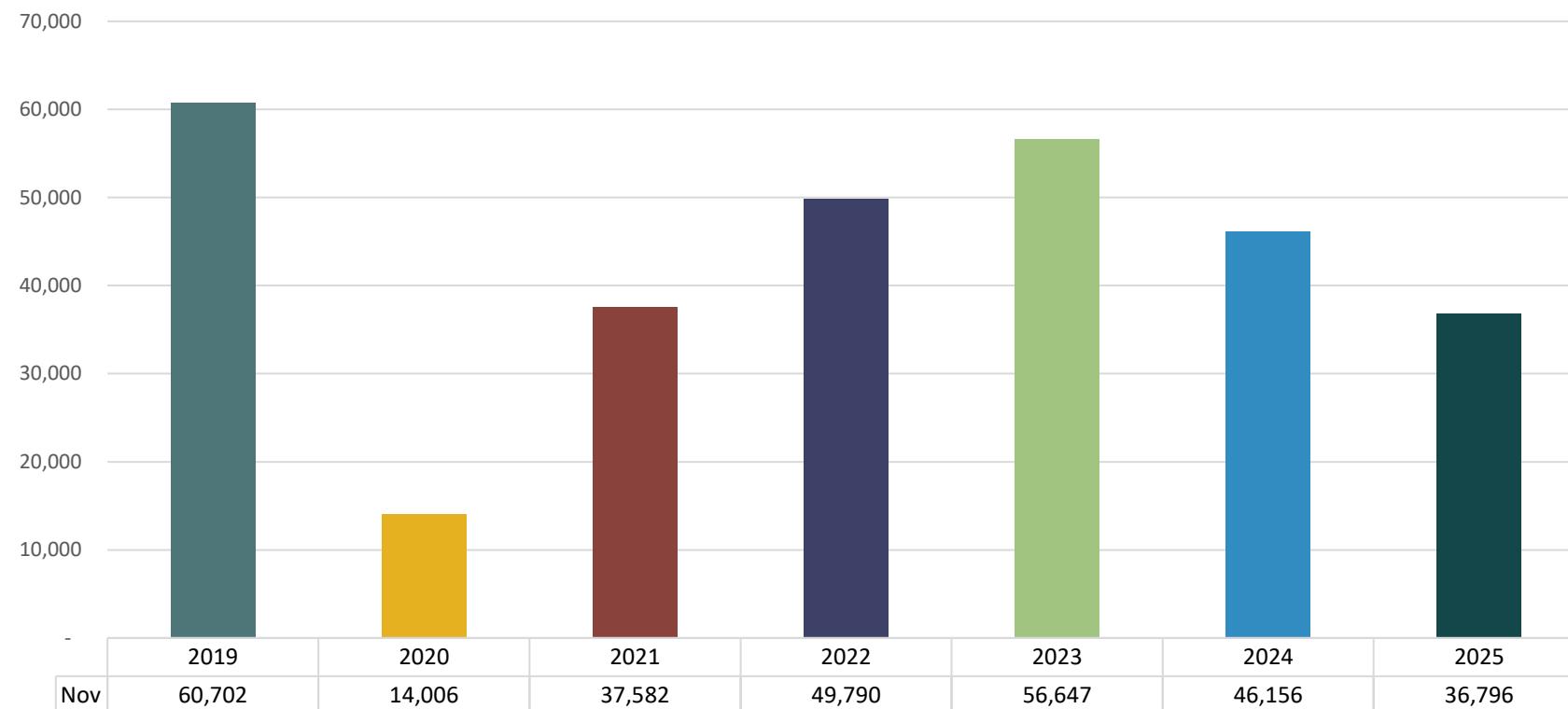


- Engaged sessions were up by 15.5% over last November.
- Engagement rate increased by 23% over November 2024.

(Source: Google Analytics & Miles Media)

Louisiana Welcome Centers

November Welcome Centers Visitation: Yr/Yr

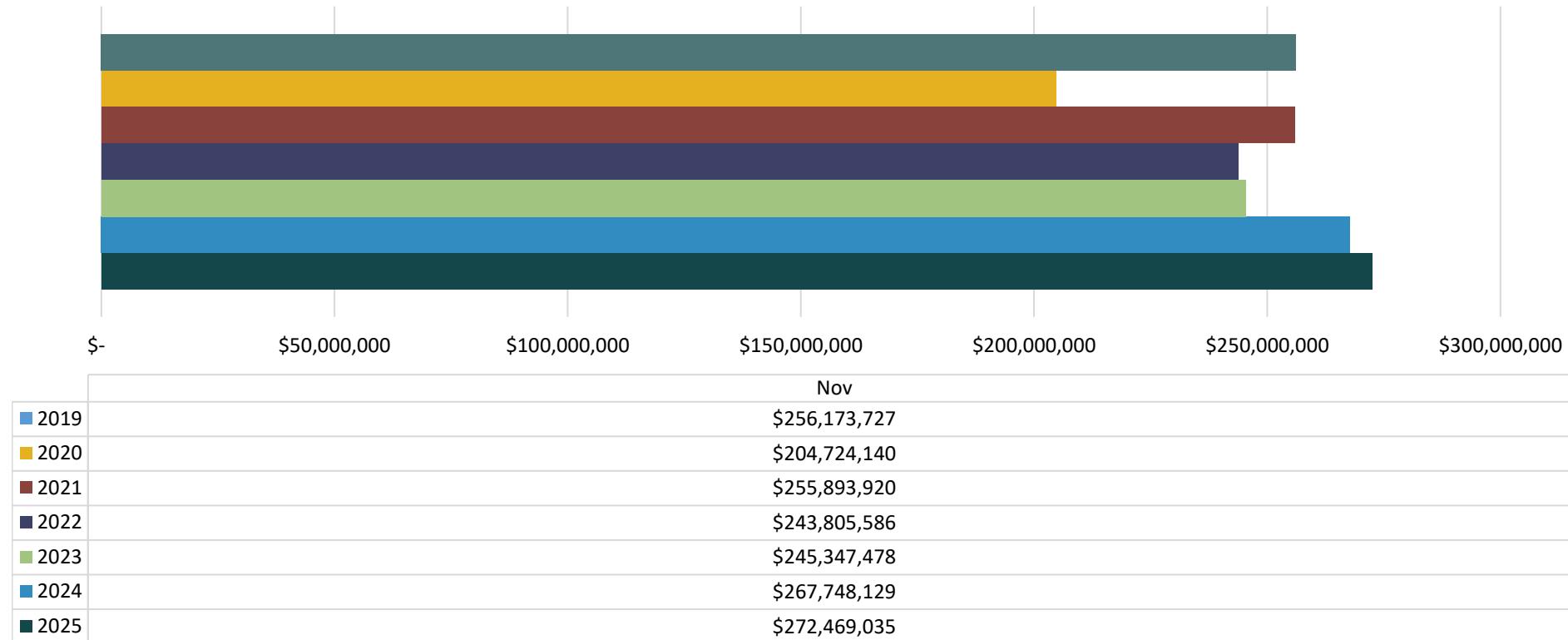


- Between November 2024 and November 2025, Louisiana welcome visitors average travel party size was 2.88.

(The Mound Welcome Center is temporarily closed) (Source: LA Welcome Centers)

Louisiana Gaming Revenue

November Gaming Revenue: Yr/Yr



- Louisiana's gaming revenue increased by 1.8% over November 2024.

(Sources: LSP – Gaming Enforcement Division)

U.S. Travel Sentiment & Trends

- Over 122 million Americans projected to travel this holiday season. (*Travel + Leisure*)
- While half of Americans (50%) are planning to travel during the holidays, more are opting to stay with family and friends instead of taking vacations. (*TravelPulse*)
- 48% of American travelers are aware that next year is the country's 250th celebration of its founding in 1776. Of those aware of America 250, 61% report they are likely to take an overnight trip tied to the anniversary activities, while 65% expect to take a day trip for this purpose. (*Longwoods International*)
- 93% of American Travelers still indicate travel plans to go somewhere within the next six months! (*Longwoods International*)
- The average expected number of trips in the coming year came in at 4 trips in November, up slightly from the 3.8 trips reported in both September and October. (*Future Partners*)
- International inbound to U.S. continued its six-month downward trend, with overseas visits down 3.5% in November. (*U.S. Travel Association*)
- Amtrak's new Gulf Coast service is on schedule to double passenger estimates, with more than 46,000 riders since its launch in August. (*Axios*)