

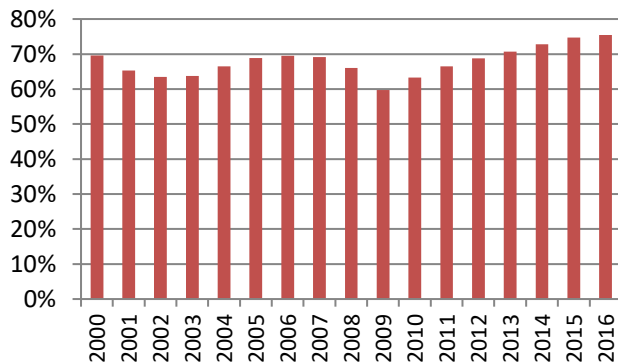
April 2017
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Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

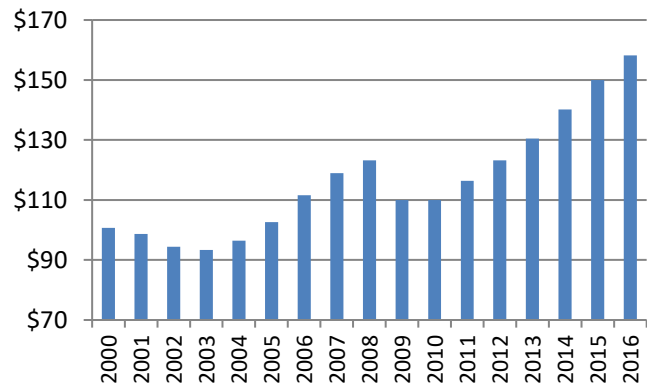
[Link to 'Latest Research' Web Page](#)

Detailed Lodging Tables

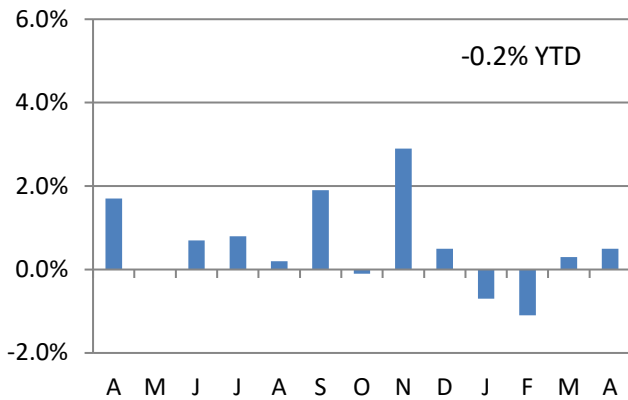
CA Occupancy: 2000-2016



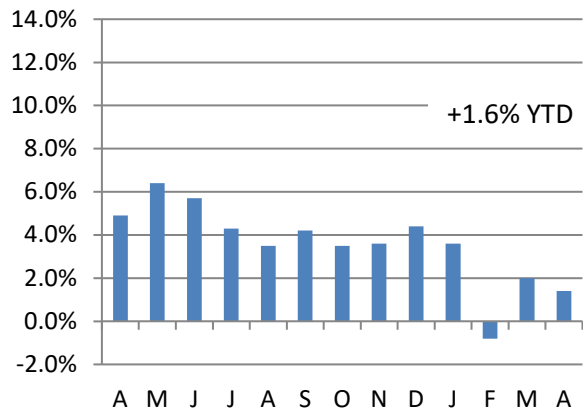
CA ADR: 2000-2016



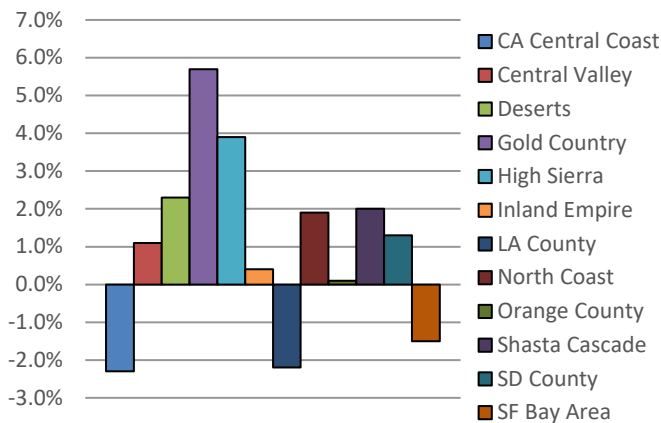
CA Occupancy Yr/Yr Chg: Last 12 Months



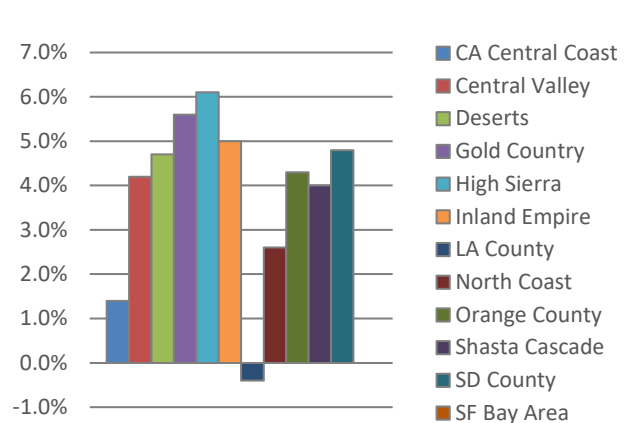
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg: April 2017



Regional CA ADR YTD Chg: April 2017

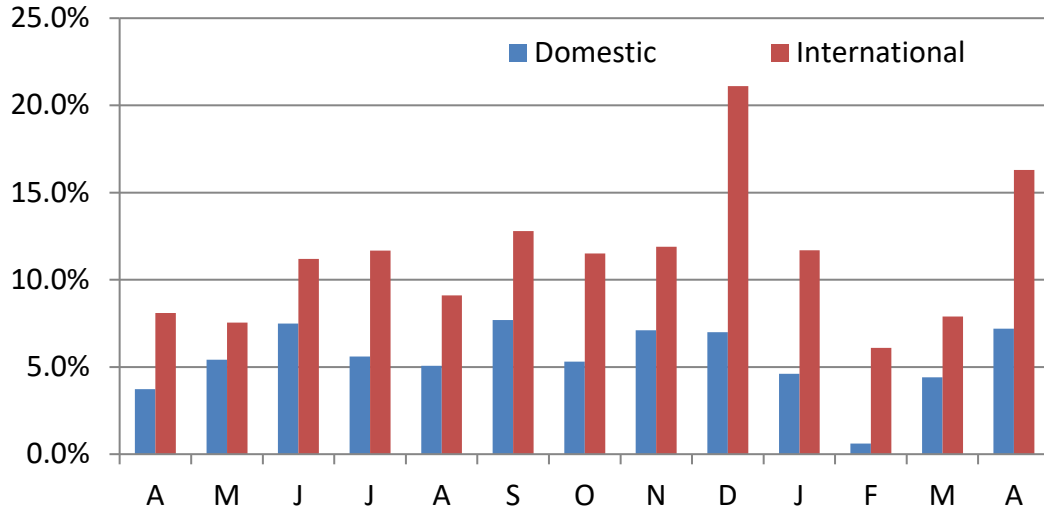


Source: Smith Travel Research

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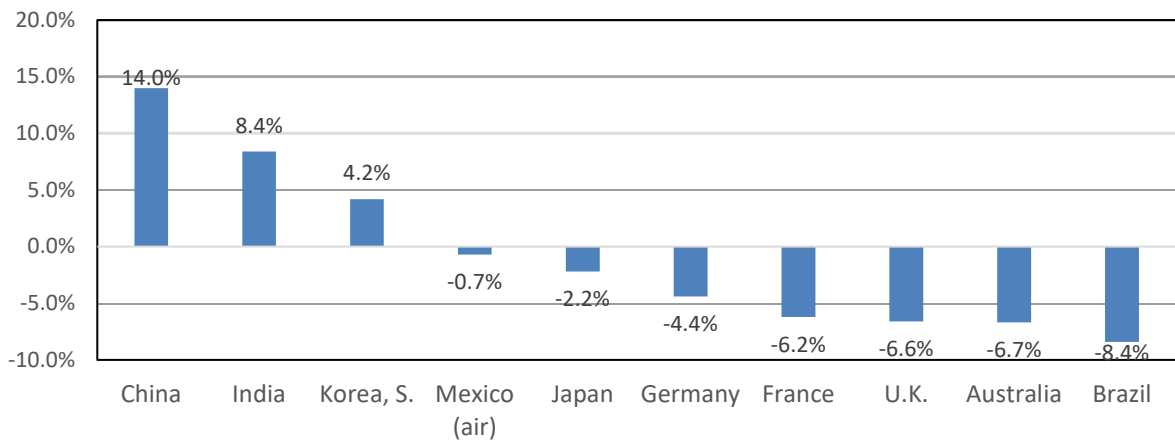
CA Airport Traffic Yr/Yr Chg: Last 12 Months

YTD
 Domestic: 4.3%
 International: 10.6%



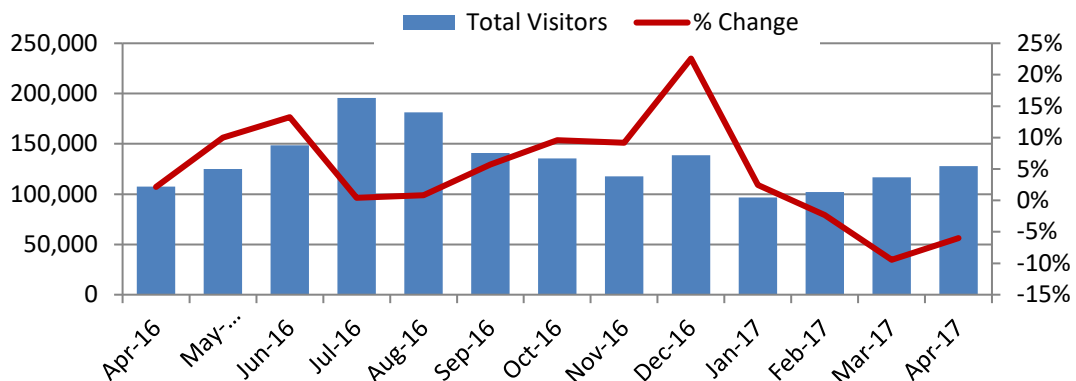
Overseas Arrivals YTD % Change (through September, 2016)

Overseas total:
 1.7% YTD



California Welcome Centers: Volume and Yr/Yr Change

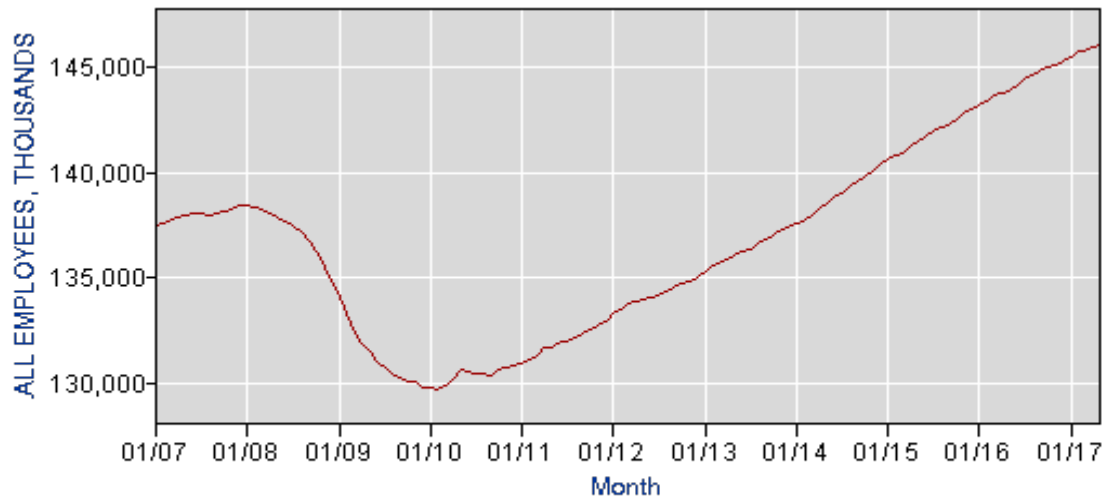
YTD
 Volume: 443,039
 % Change: -4.4



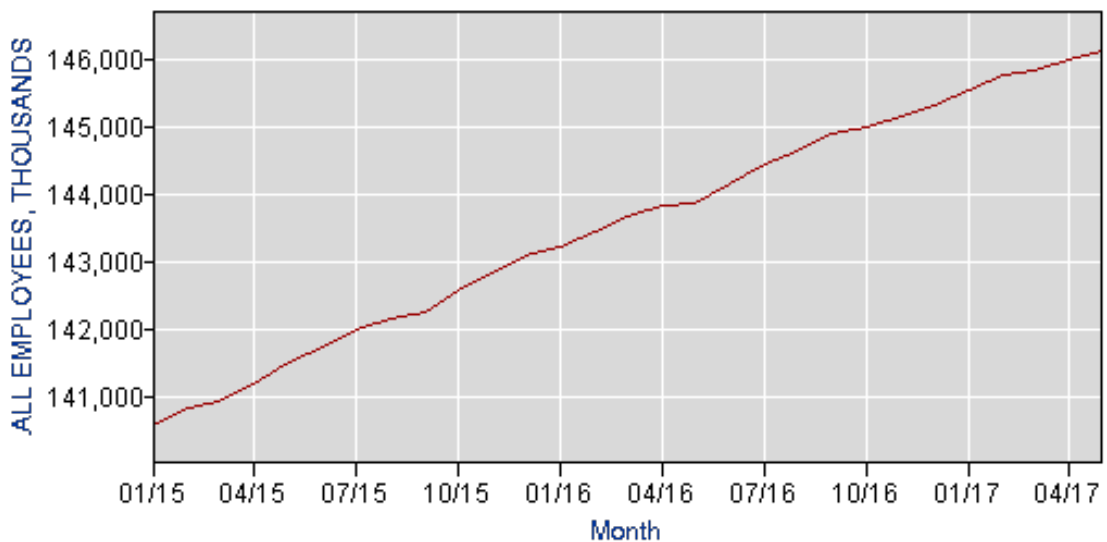
Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year. Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

ECONOMIC INDICATORS: DOMESTIC

US Work Force: 2007-present

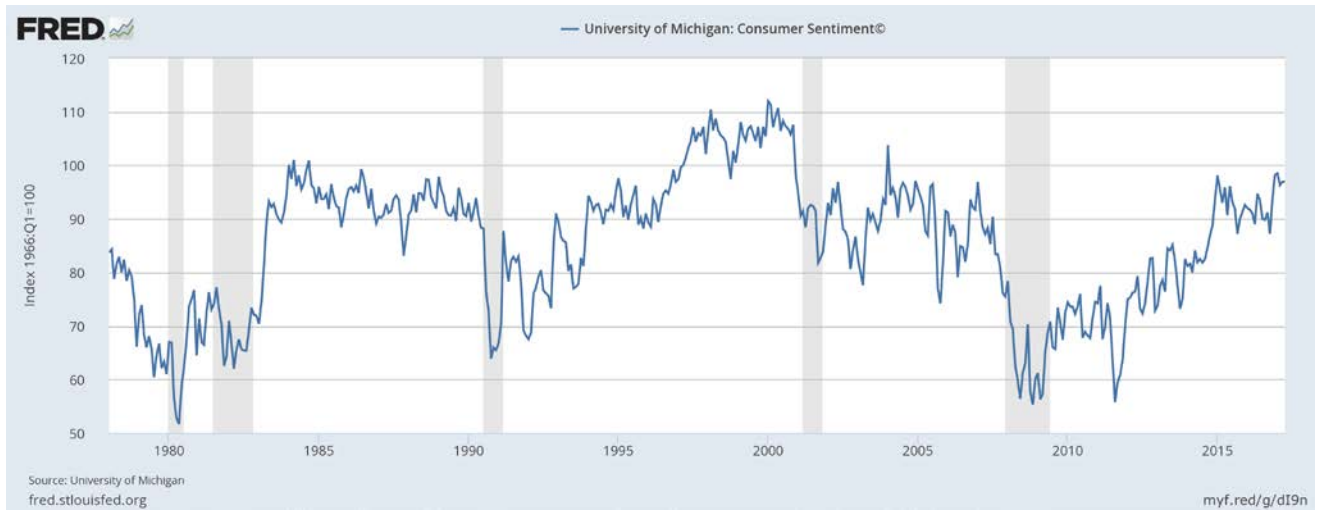


US Work Force: 2015-present

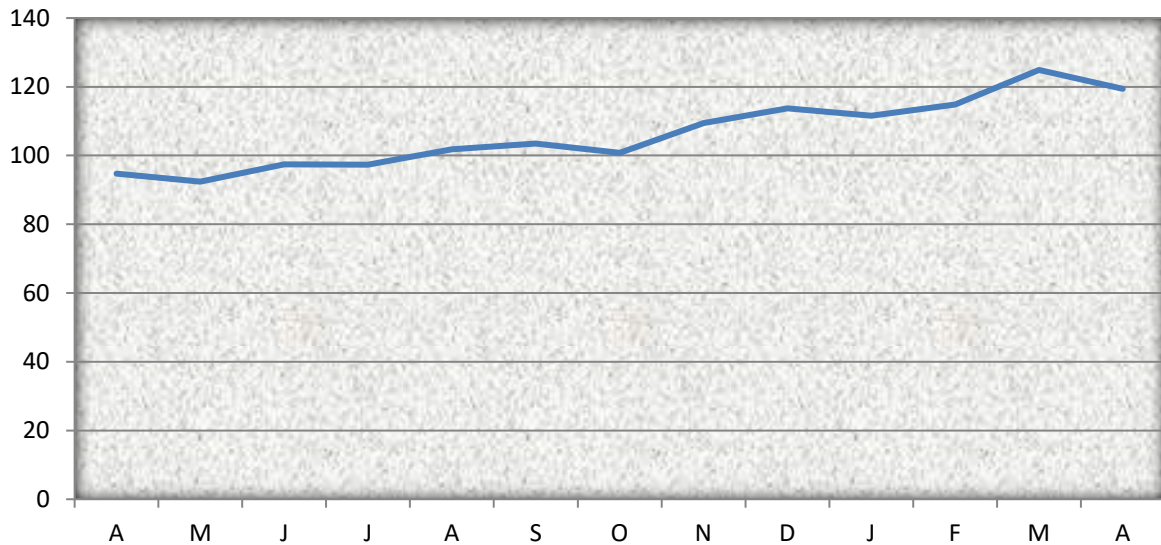


Source: Bureau of Labor Statistics; Survey Research Center

US Consumer Confidence: 1978-present



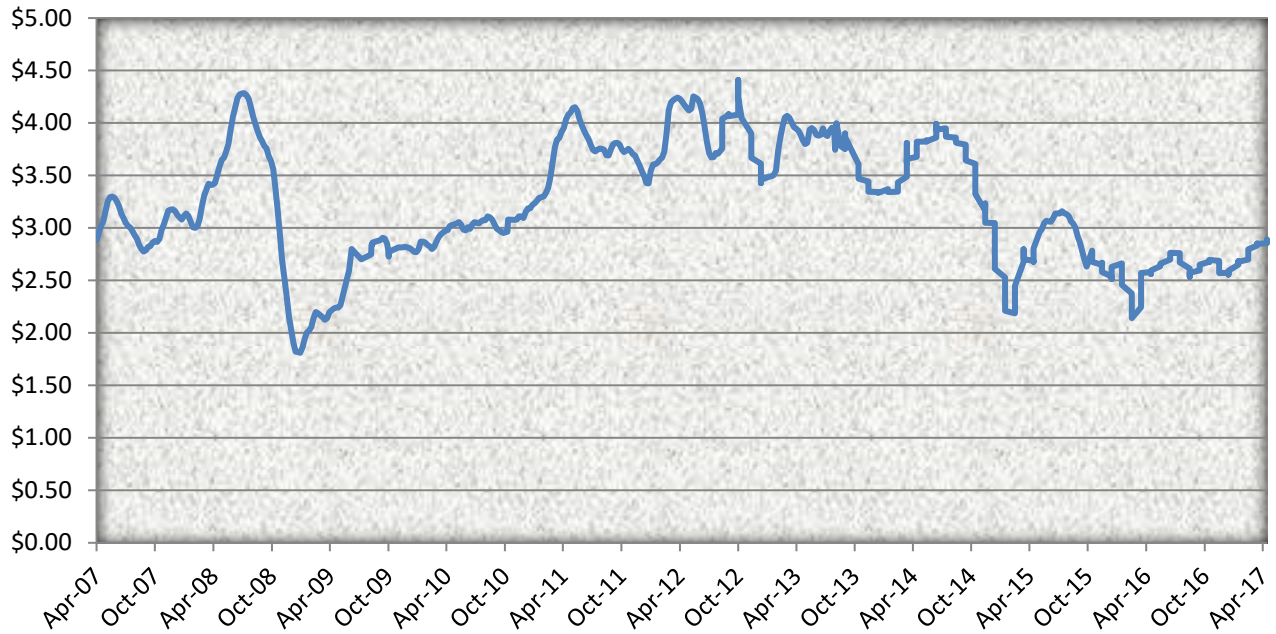
US Consumer Confidence Last 12 Months



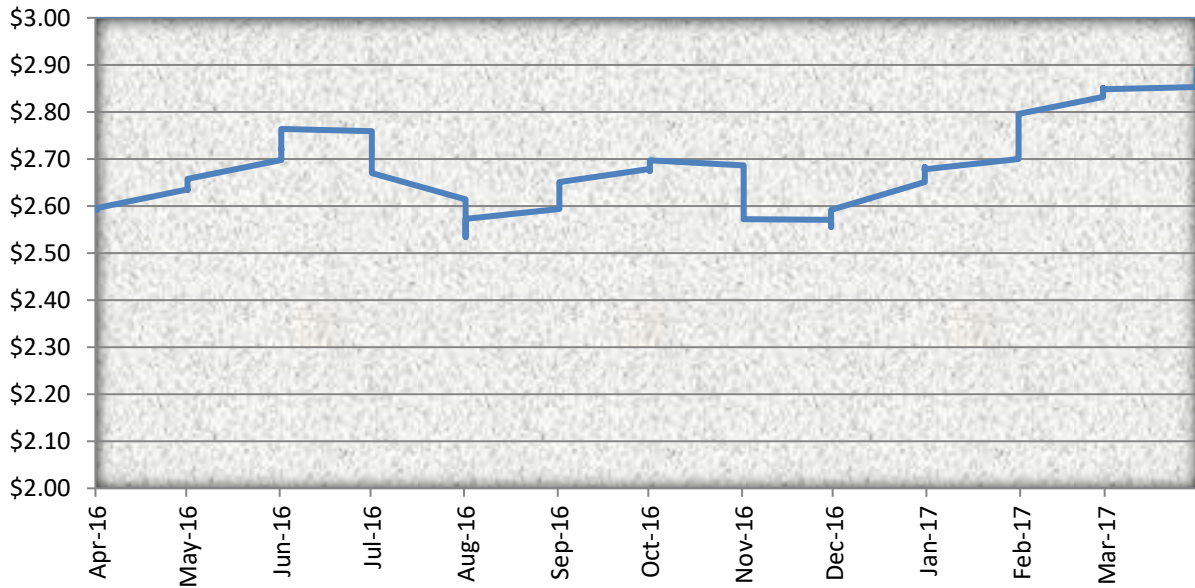
Sources: The Conference Board, University of Michigan

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West Coast Regular Gas Prices: 2007-Present

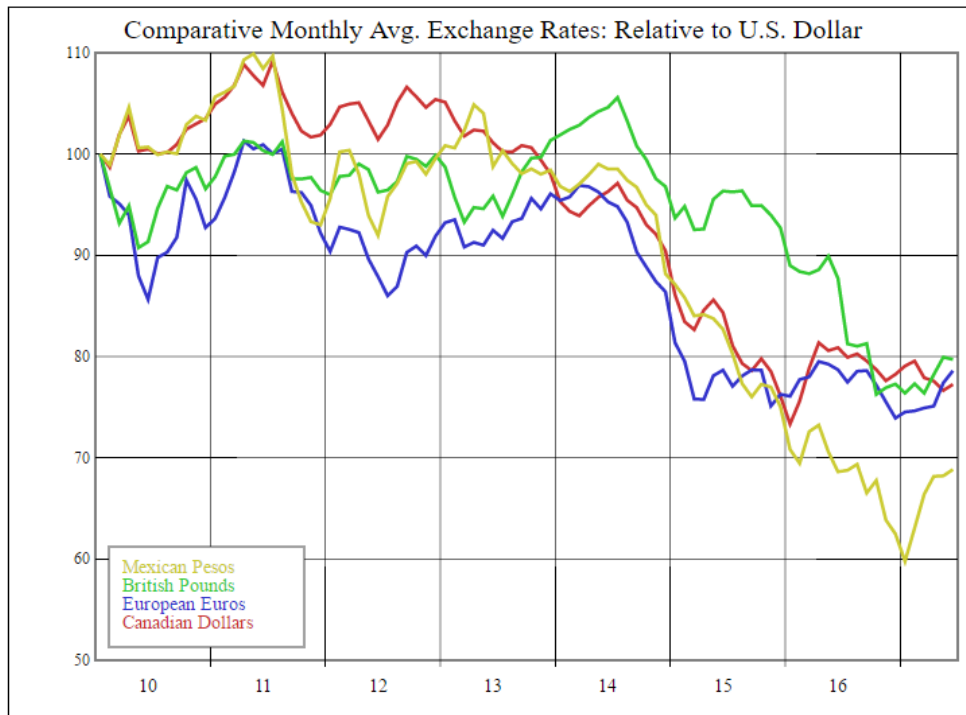
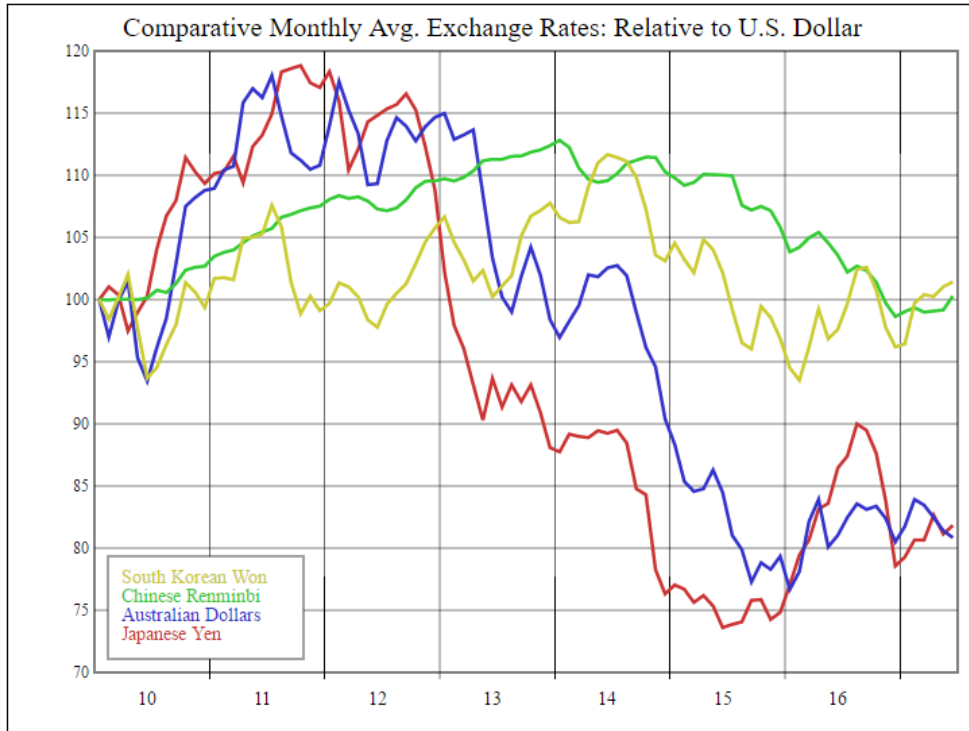


West Coast Regular Gas Prices: Last 12 Months



Source: Energy Information Administration

Exchange Rates
Relative Change Since 2010



Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

INTERNATIONAL TRAVEL FORECAST

Annual International Trips to California											
(Annual % change)											
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total	8.8%	3.5%	4.5%	5.1%	3.6%	1.6%	-0.9%	2.6%	3.4%	4.1%	4.1%
China	22.9%	42.8%	22.1%	21.5%	16.7%	17.1%	11.2%	11.0%	10.9%	10.7%	10.6%
India	1.2%	3.0%	26.3%	9.3%	11.2%	9.5%	8.4%	8.3%	7.7%	7.4%	7.5%
Japan	4.8%	1.7%	-4.0%	7.4%	-6.5%	1.9%	1.8%	1.4%	1.1%	0.9%	1.0%
South Korea	-5.4%	-1.7%	0.4%	2.0%	10.3%	7.3%	5.5%	5.2%	5.1%	4.7%	4.7%
Australia	11.3%	-5.1%	5.9%	6.4%	3.6%	-0.9%	-0.8%	1.3%	1.2%	1.2%	1.5%
United Kingdom	7.4%	-3.1%	2.6%	5.3%	2.7%	-1.7%	-0.7%	1.2%	1.5%	1.6%	1.5%
Germany	7.4%	-2.4%	5.7%	4.1%	-0.6%	-2.9%	-1.0%	1.5%	2.4%	2.9%	2.9%
France	17.9%	-16.1%	4.0%	14.7%	-0.9%	0.3%	-2.3%	2.3%	2.2%	2.8%	3.2%
Italy	-3.9%	-11.4%	-4.2%	13.2%	-0.8%	0.3%	-2.0%	1.2%	2.4%	2.1%	2.3%
Scandinavia	14.2%	7.9%	7.0%	11.1%	3.1%	0.9%	-1.4%	0.8%	1.5%	1.6%	2.0%
Brazil	34.9%	14.2%	12.8%	6.7%	2.0%	-18.3%	-0.1%	2.7%	3.9%	3.6%	3.2%
Middle East	19.4%	26.3%	14.0%	21.9%	4.4%	1.5%	-6.8%	0.3%	2.5%	2.9%	3.2%
Canada	8.8%	4.6%	1.6%	3.7%	-2.8%	-2.4%	1.1%	2.1%	2.3%	2.5%	2.3%
Mexico	7.5%	5.7%	3.4%	1.3%	3.0%	1.9%	-4.7%	1.2%	2.5%	3.8%	3.9%
Rest of World	12.5%	-4.9%	5.3%	8.5%	8.4%	-1.7%	1.7%	2.8%	3.3%	3.1%	2.7%

Source: Tourism Economics, CIC Research, OTTI

Note on volatility of historical data and treatment in forecast: Due to smaller sample sizes and relatively smaller visitor volumes in absolute terms, the historical data of origin markets tends to be more volatile than total visitor volumes.

Almost Twice as Many People Prefer Relaxing Vacations to Active Ones

In a 17-country online survey conducted by GfK, well over half (59 percent) of people say they prefer a vacation “where I relax and take it easy.” This compares to just over a third (35 percent) who prefer “an active vacation where I do or see lots of things.” Only six percent are not sure which type they prefer.

Internationally, there is next to no difference between men and women in these preferences. Men are potentially very slightly lazier in their holiday choice than women – standing at 60 percent of men preferring a relaxing vacation, compared to 58 percent of women. But for active holidays, men and women stand neck and neck at 35 percent each

Families with teenagers slightly more inclined to active holidays than others

The presence of children in the household appears to make only limited difference to people's holiday preferences, compared to the international average. For those with children under six years old in the household, or those with children aged between six and twelve, just under two thirds (62 percent) favor relaxing vacations and just over a third favor active ones.

Teenagers most inclined to energetic vacations; those aged in their forties are most inclined to lazy ones

Internationally, the biggest differences we see are when it comes to age groups. Teenagers are the most inclined to favor active holidays, with 43 percent selecting this and 51 percent preferring a relaxing holiday. The preference for active vacations then drops steadily with each age band, ending with those aged in their fifties, and those aged 60 or over, both standing at just one third (33 percent) favoring active holidays.

Nearly half of Italians and French prefer active holidays, while over two thirds of Brazilians and South Koreans want to relax

Italy (45 percent), France (44 percent) and Spain (43 percent) lead in having the highest percentage of their online population who prefer active vacations where they do and see lots of things.

In contrast, Brazil (71 percent), South Korea (66 percent) and Japan (also 66 percent) lead for having the highest percentages preferring a relaxing vacation where they take it easy.”

[Read the Full Article at Hospitality Net](#) or [Download the Report from GfK](#)

PREFERRED VACATION TYPE

Average across 17 countries



GfK

TRAVEL TRENDS/NEWS

[US Summer Online Travel Spending Growth Has Slowed in 2017](#)

– Skift/Adobe Digital Insights

[Report Shows Families Seeking Out Unconventional Destinations](#)

– Travel Pulse

[Brands Focus on Next Phase of Traveler Engagement](#)

– Skift

INTERNATIONAL TRENDS/NEWS

[Emerging Markets Will Drive Business Travel Growth Over Next Decade](#)

- Skift/World Travel & Tourism Council/Travelport

[China Consumer Lifestyles in 2016](#)

- Euromonitor