

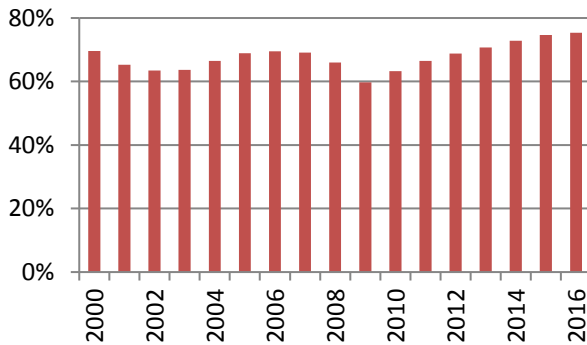
**December 2016**  
**Visit California**  
**Monthly Tracking Dashboard**

**TOURISM INDUSTRY INDICATORS**

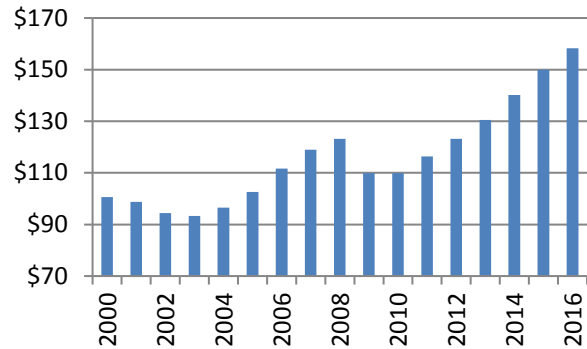
[Link to 'Latest Research' Web Page](#)

**Detailed Lodging Tables**

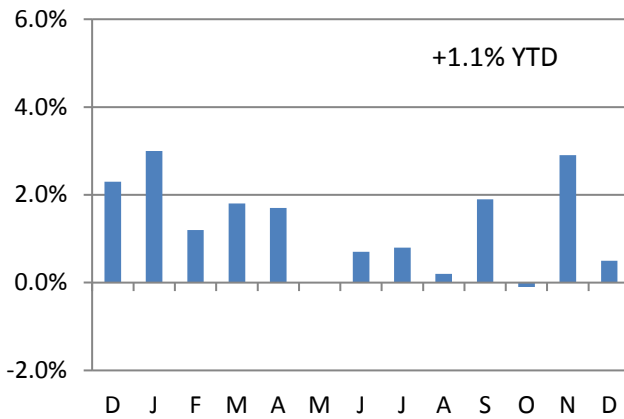
**CA Occupancy: 2000-2016**



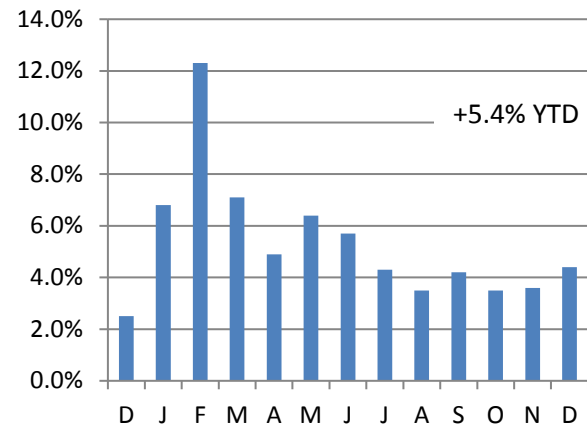
**CA ADR: 2000-2016**



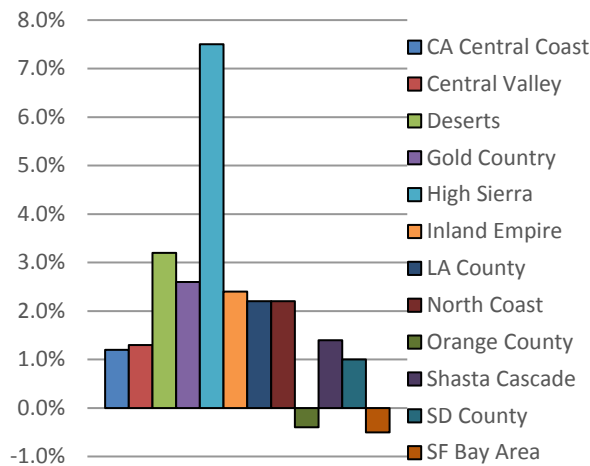
**CA Occupancy Yr/Yr Chg: Last 12 Months**



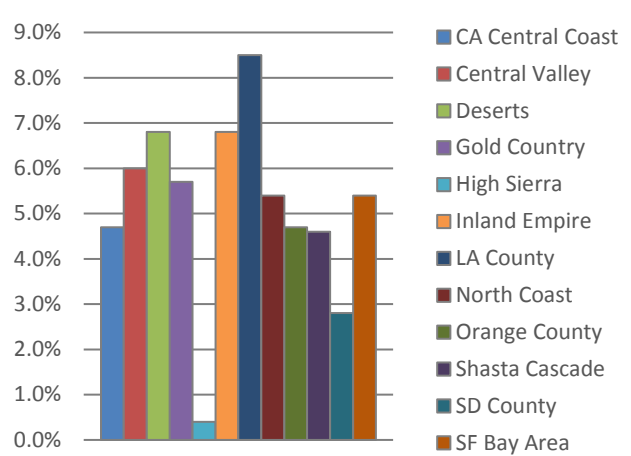
**CA ADR Yr/Yr Chg: Last 12 Months**



**Regional CA Occupancy YTD Chg: December 2016**



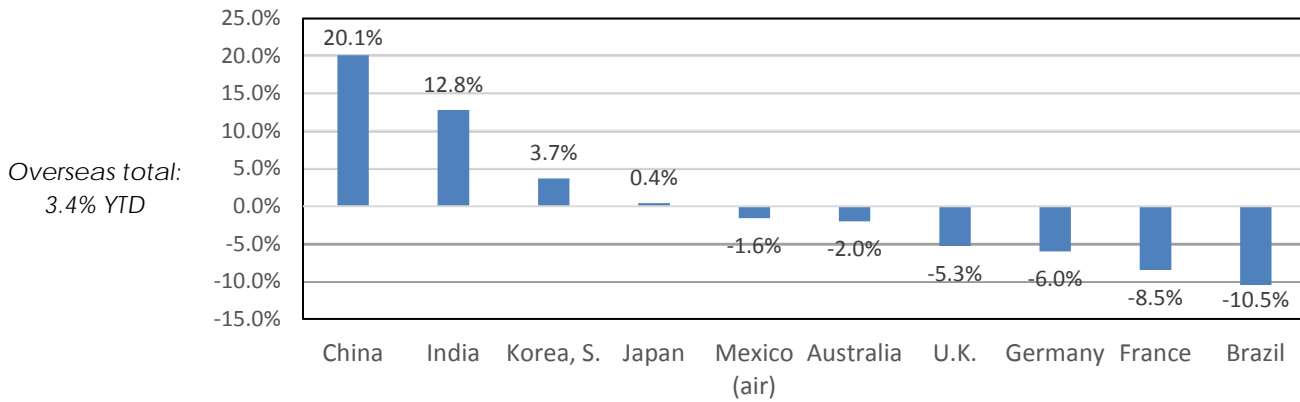
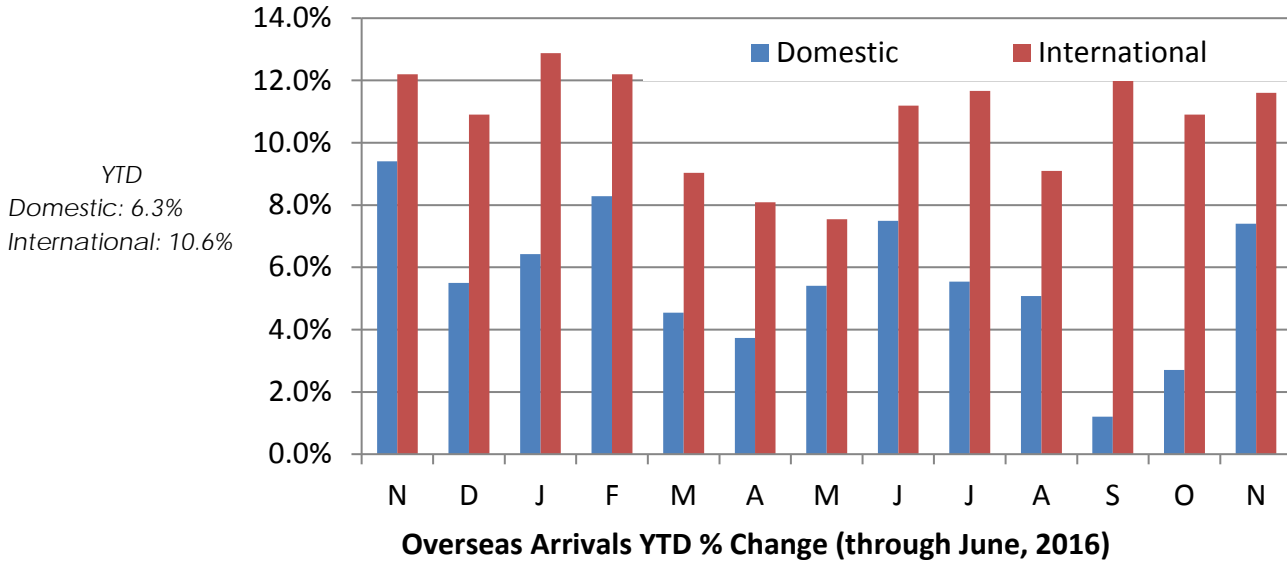
**Regional CA ADR YTD Chg: December 2016**



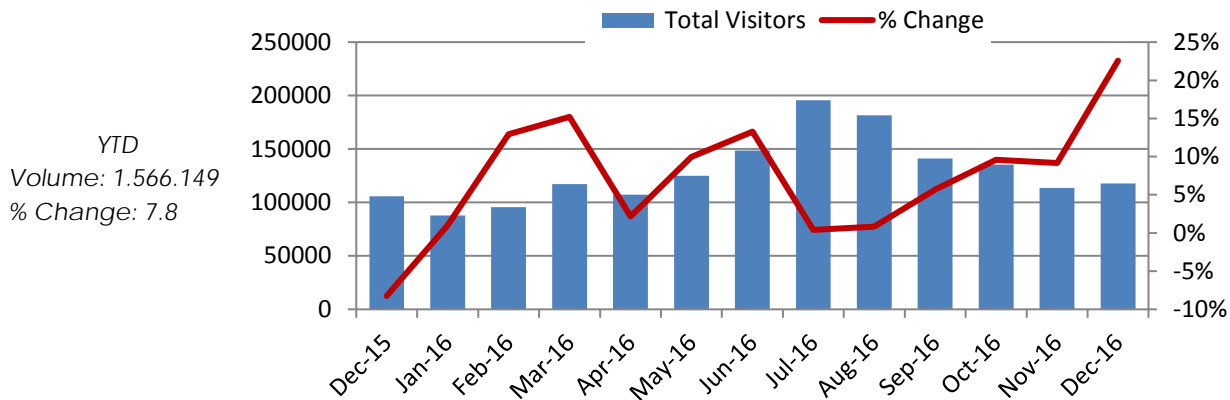
Source: Smith Travel Research

**December 2016**  
**Visit California**  
**Monthly Tracking Dashboard**

**CA Airport Traffic Yr/Yr Chg: Last 12 Months**



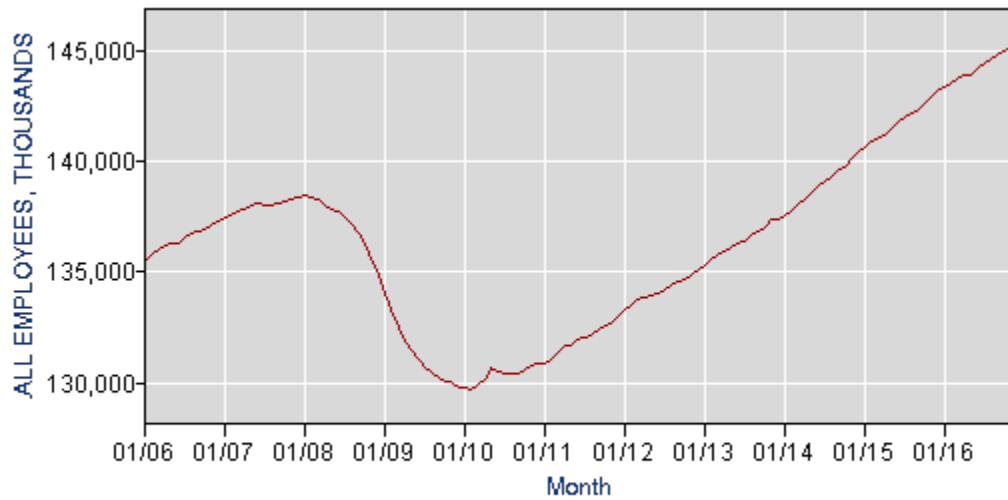
**California Welcome Centers: Volume and Yr/Yr Change**



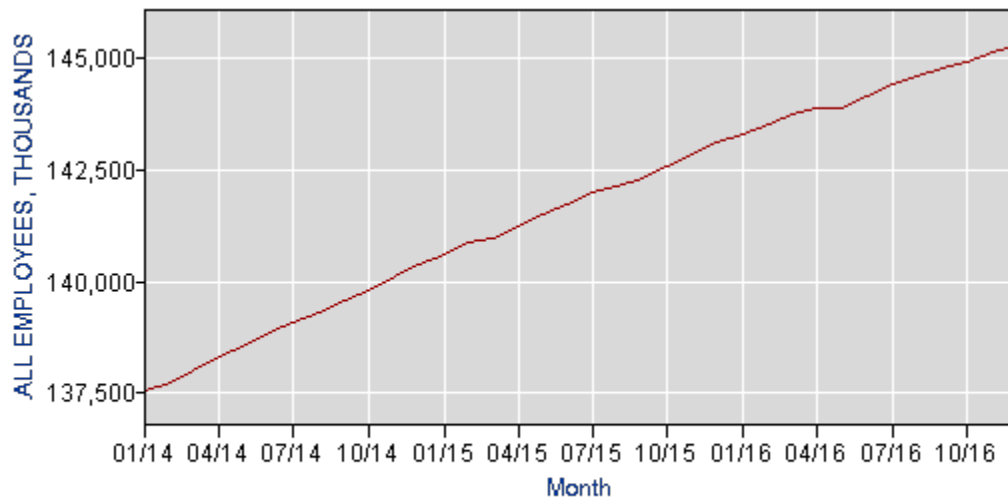
Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year. Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

**ECONOMIC INDICATORS: DOMESTIC**

**US Work Force: 2006-present**



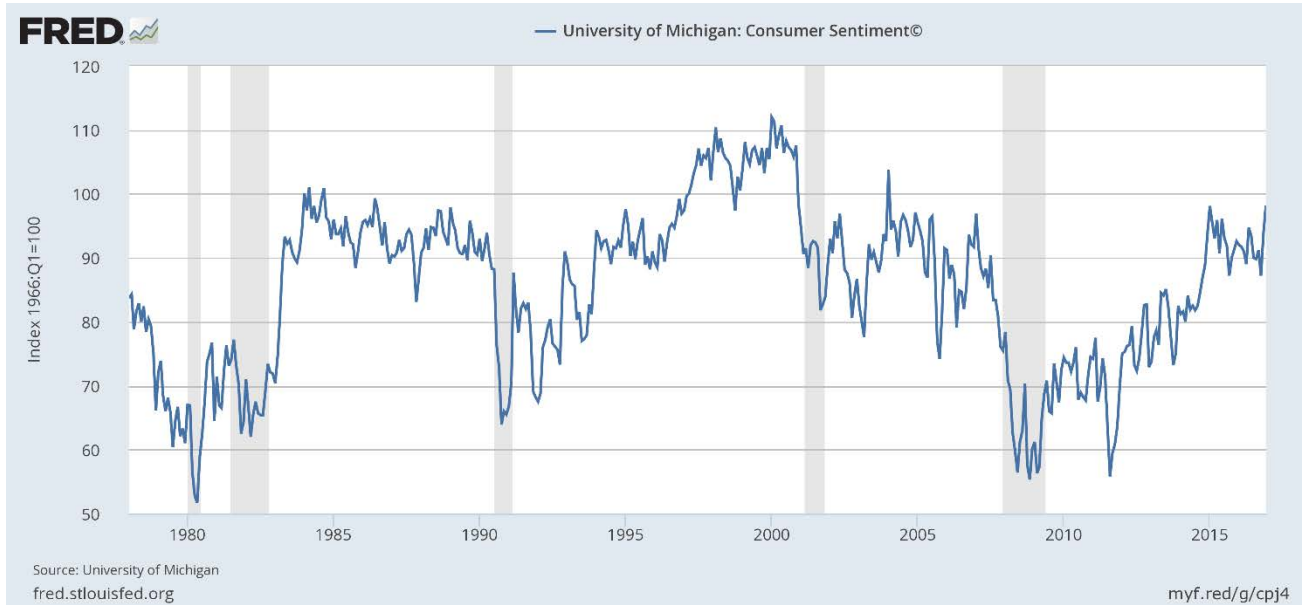
**US Work Force: 2014-present**



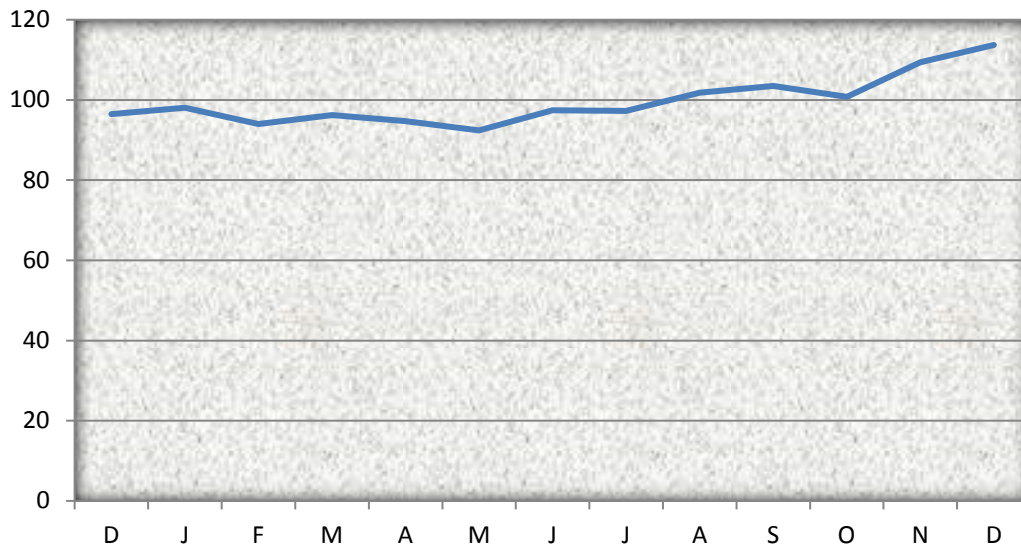
Source: Bureau of Labor Statistics; Survey Research Center

December 2016  
 Visit California  
 Monthly Tracking Dashboard

US Consumer Confidence: 1978-present



US Consumer Confidence Last 12 Months



Sources: The Conference Board, University of Michigan

**December 2016**  
**Visit California**  
**Monthly Tracking Dashboard**

**West Coast Regular Gas Prices: 2006-Present**

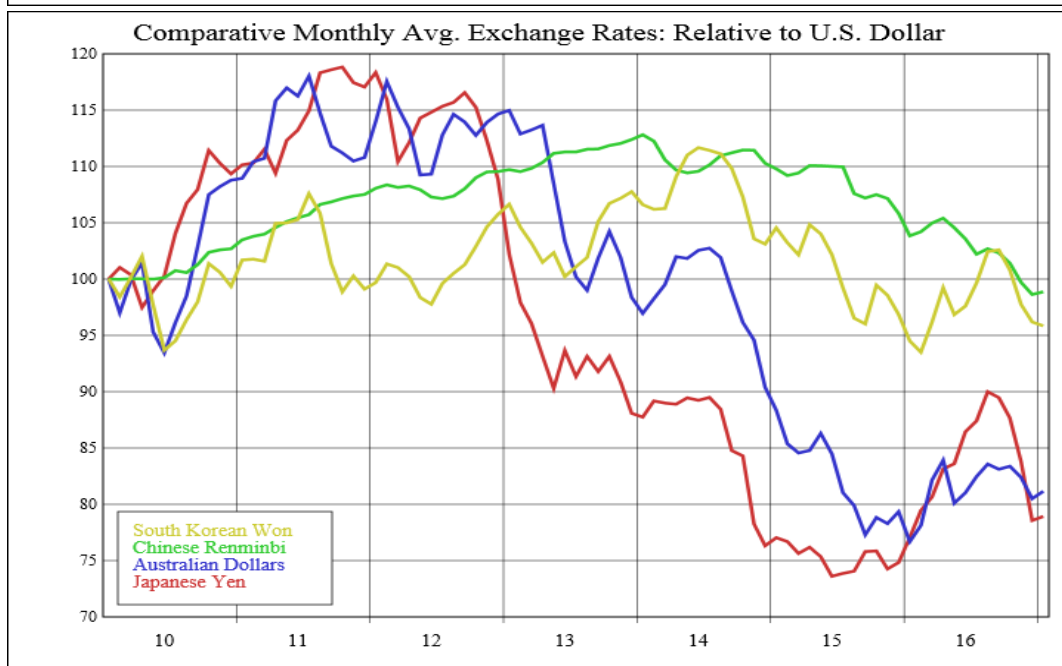
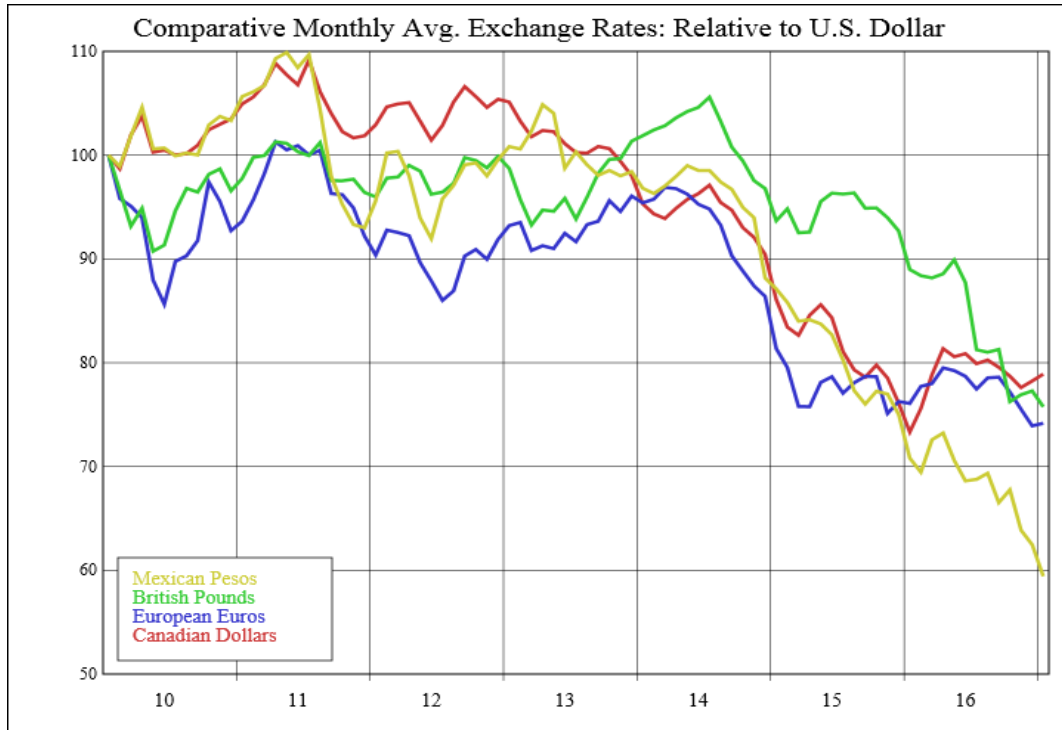


**West Coast Regular Gas Prices: Last 12 Months**



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)											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Total</b>	9.4%	8.8%	3.5%	4.5%	5.1%	3.3%	3.0%	3.7%	4.0%	4.2%	4.5%
<b>China</b>	57.1%	22.9%	42.8%	22.1%	21.5%	16.5%	17.8%	14.7%	11.3%	10.5%	10.6%
<b>India</b>	19.2%	1.2%	3.0%	26.3%	9.3%	9.1%	9.6%	8.4%	7.7%	8.2%	8.9%
<b>Japan</b>	19.3%	4.8%	1.7%	-4.0%	7.4%	-8.8%	0.2%	1.3%	1.9%	2.0%	1.8%
<b>South Korea</b>	47.7%	-5.4%	-1.7%	0.4%	2.0%	10.9%	16.9%	8.1%	7.6%	8.2%	8.0%
<b>Australia</b>	36.6%	11.3%	-5.1%	5.9%	6.4%	3.7%	4.5%	3.1%	4.3%	5.1%	4.8%
<b>United Kingdom</b>	3.2%	7.4%	-3.1%	2.6%	5.3%	2.1%	5.4%	2.4%	3.6%	3.4%	3.2%
<b>Germany</b>	12.5%	7.4%	-2.4%	5.7%	4.1%	-0.6%	2.2%	2.0%	4.0%	3.3%	2.9%
<b>France</b>	37.1%	17.9%	-16.1%	4.0%	14.7%	-0.9%	-0.7%	2.2%	3.2%	4.8%	4.6%
<b>Scandanavia</b>	21.9%	14.2%	7.9%	7.0%	11.1%	5.0%	1.1%	4.1%	4.7%	5.2%	5.3%
<b>Brazil</b>	32.0%	34.9%	14.2%	12.8%	6.7%	4.3%	-9.8%	1.1%	3.0%	4.0%	3.6%
<b>Canada</b>	10.0%	8.8%	4.6%	1.6%	3.7%	-8.4%	-3.6%	2.3%	2.8%	3.2%	3.7%
<b>Mexico</b>	1.8%	7.5%	5.7%	3.4%	1.3%	3.4%	1.8%	2.5%	2.7%	3.0%	3.4%
<b>Rest of World</b>	9.0%	-4.9%	-3.1%	5.4%	10.2%	7.8%	2.4%	2.7%	3.4%	3.7%	3.5%

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.

## Luxury Hospitality in 2017

The luxury consumer in 2017 is seeking integrated experiences that align their various passions in a seamless whole, whereby the convergence of elements delivers a sum greater than its parts.

According to The Future Laboratory’s new Luxury Futures Report 2016, “Luxury brands are becoming convergence spaces that facilitate culture, education and wellness, combining diverse consumer needs into a single, multifaceted lifestyle zone.”

In travel today, the most forward-thinking luxury hotels are playing the role of those convergence spaces.

During the International Luxury Travel Market (ILTM) conference in Cannes last month, many hospitality executive emphasized that their guests want the best in food, wellness, culture, and activities combined together in one destination, with the hotel acting as the curator to customize the experience. Luxury guests especially want access to everything that wealthy locals have access to, and they want it provided within a context that educates them as much as possible about the local community and culture.

According to Tim Davis, VP, brand & marketing at Small Luxury Hotels (SLH), there’s a rise in demand for smaller hotels under 30 rooms because, he argues, they tend to provide a more easily navigable, stress-free, relaxed, and locally immersive travel experience.

That’s driving the company’s membership development strategy. SLH added 57 new properties to its portfolio in 2016 with an overall average size of 28 rooms. That contrasts significantly in comparison to the company- wide average of 48 rooms across the consortia’s 510 hotels and resorts previous to 2016.

“Small has never been bigger,” said Davis. “Our guests’ passion for immersive authentic experiences is not new but it’s more important for them than ever before. They want to feel that they are really staying where they are staying.”

SLH has identified four primary trends for 2017, which the company labels as: Love of Local, Experiences of a Lifetime, Digital Detox, and Sophisticated Simplicity.

With regard to the latter two relating to reducing stress in-destination, Davis said, “Luxury travel today is about getting away from social media and throwing your phone in the

pool. It’s about getting back to friends and family, and what’s most important in life.”

[Read Full Report](#)



Hotel News Resource

### TRAVEL TRENDS/NEWS

[What Family Travelers Really Think About Alternative Accommodations](#)

– Skift

[Travel Agent 2020](#)

- Hotel News Resource

### CONSUMER TRENDS/NEWS

[Welcome to the Gen Z Challenge](#)

– AdAge

[Luxury Marketers Should Focus Beyond the Affluent](#)

– Luxury Daily

[Millennials Are All the Rage, but Don’t Forget Boomers](#)

– Smart Brief