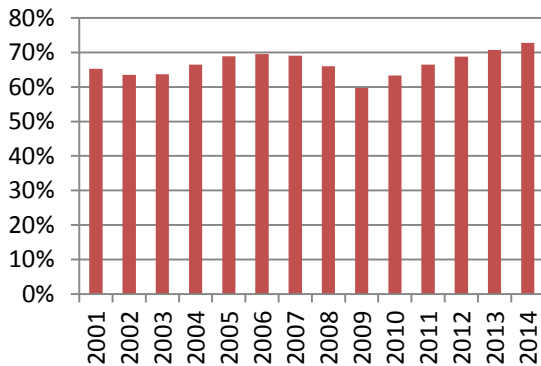


TOURISM INDUSTRY INDICATORS

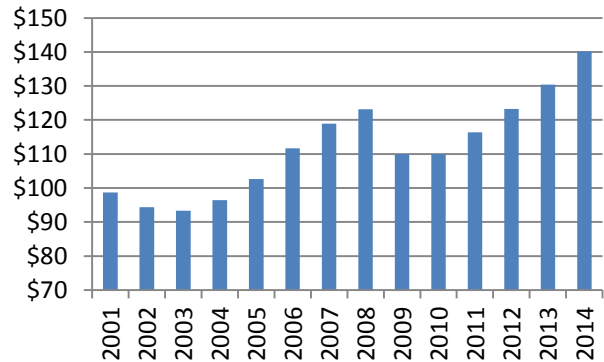
[Link to 'Latest Research' Web Page](#)

Detailed Lodging Tables

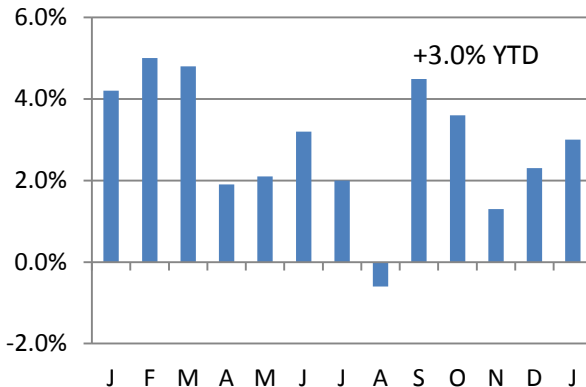
CA Occupancy: 2000-2014



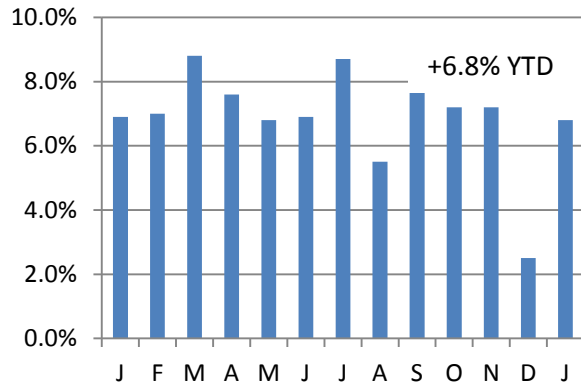
CA ADR: 2000-2014



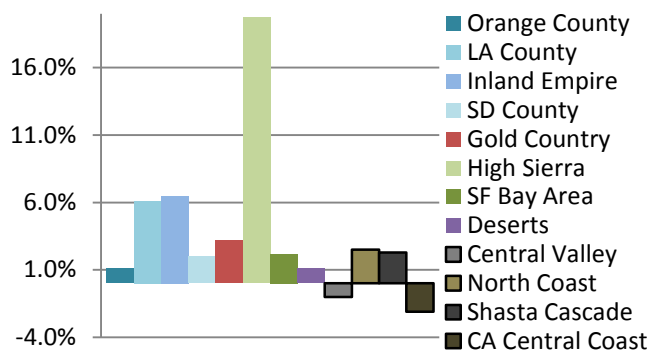
CA Occupancy Yr/Yr Chg: Last 12 Months



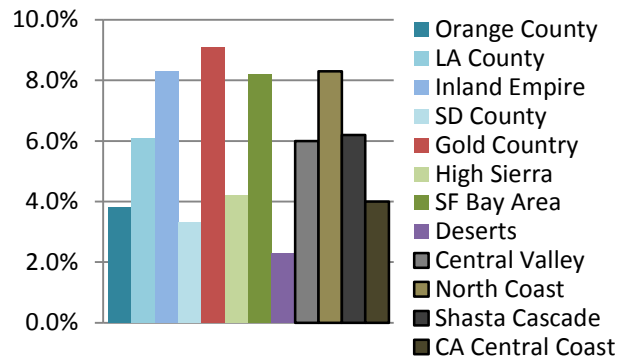
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg: Jan 2016



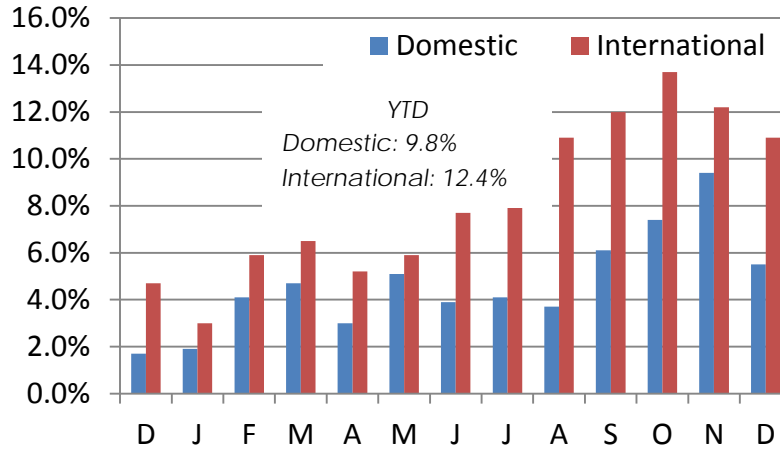
Regional CA ADR YTD Chg: Jan 2016



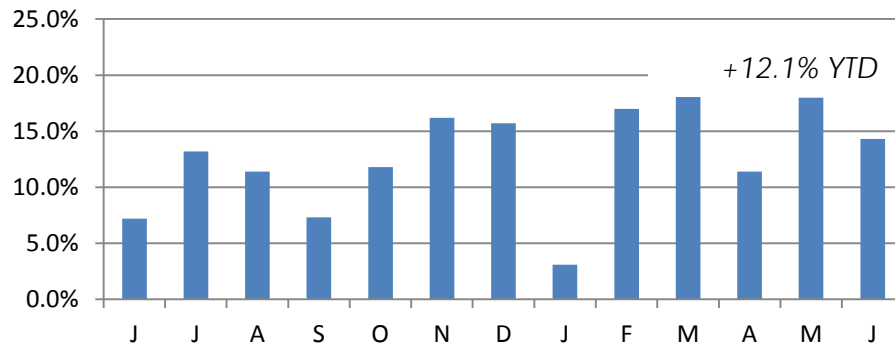
Source: Smith Travel Research

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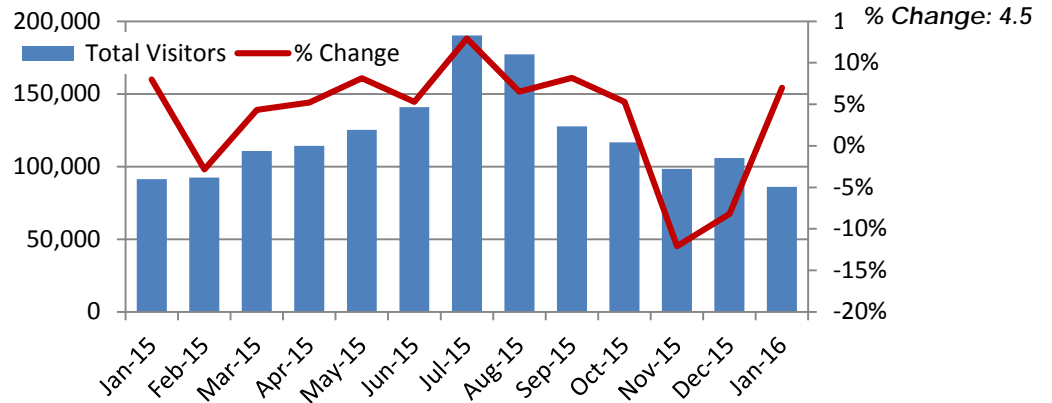
CA Airport Traffic Yr/Yr Chg: Last 12 Months



Overseas Arrivals Yr/Yr Chg: Last 12 Months (through June, 2015)



California Welcome Centers: Volume and Yr/Yr Change

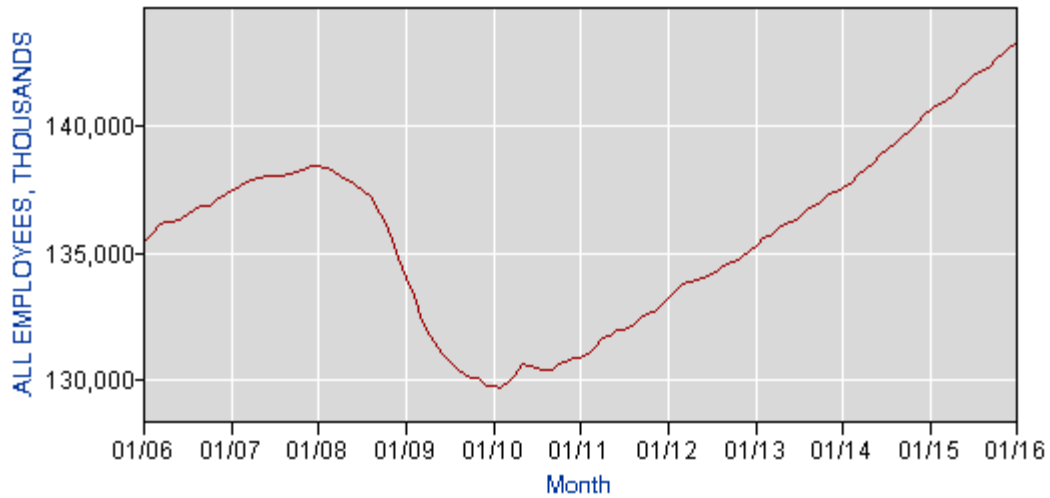


Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year.

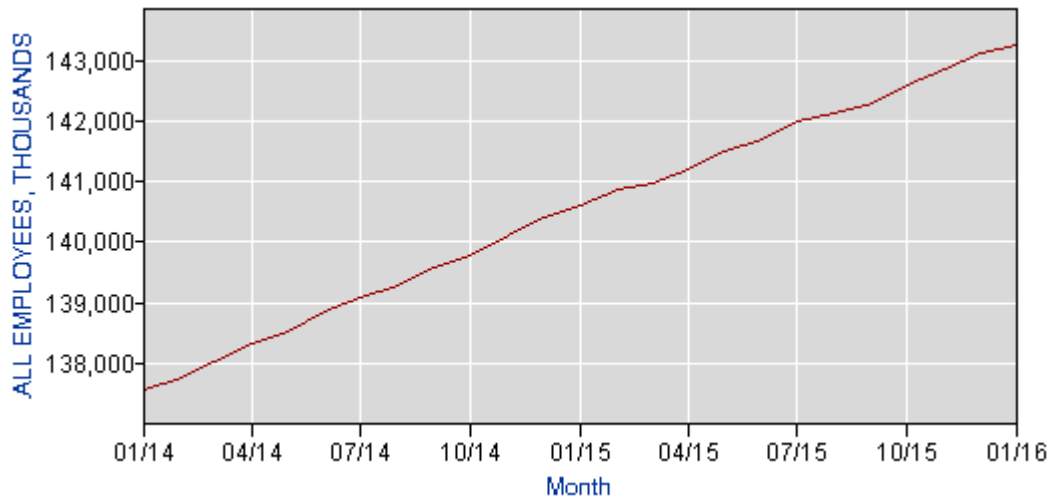
Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

ECONOMIC INDICATORS: DOMESTIC

US Work Force: 2005-present

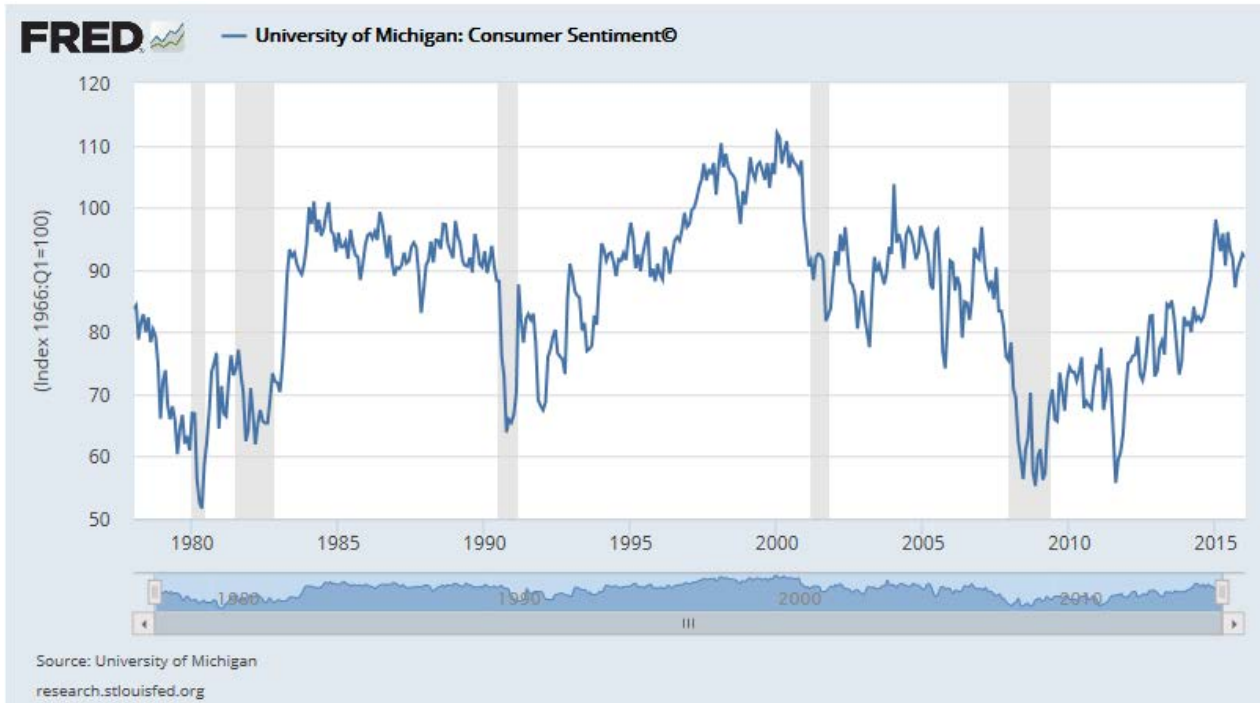


US Work Force: 2014-present

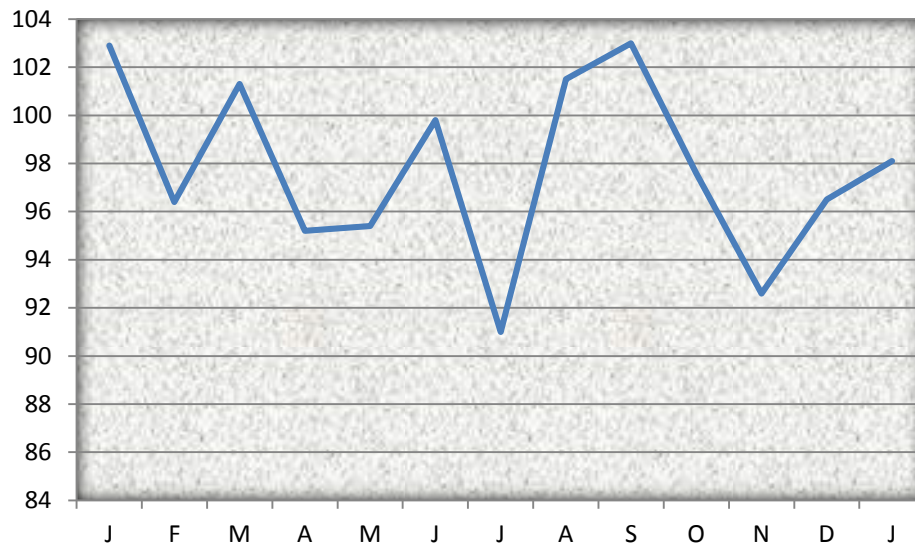


Source: Bureau of Labor Statistics; Survey Research Center

US Consumer Confidence: 1978-present



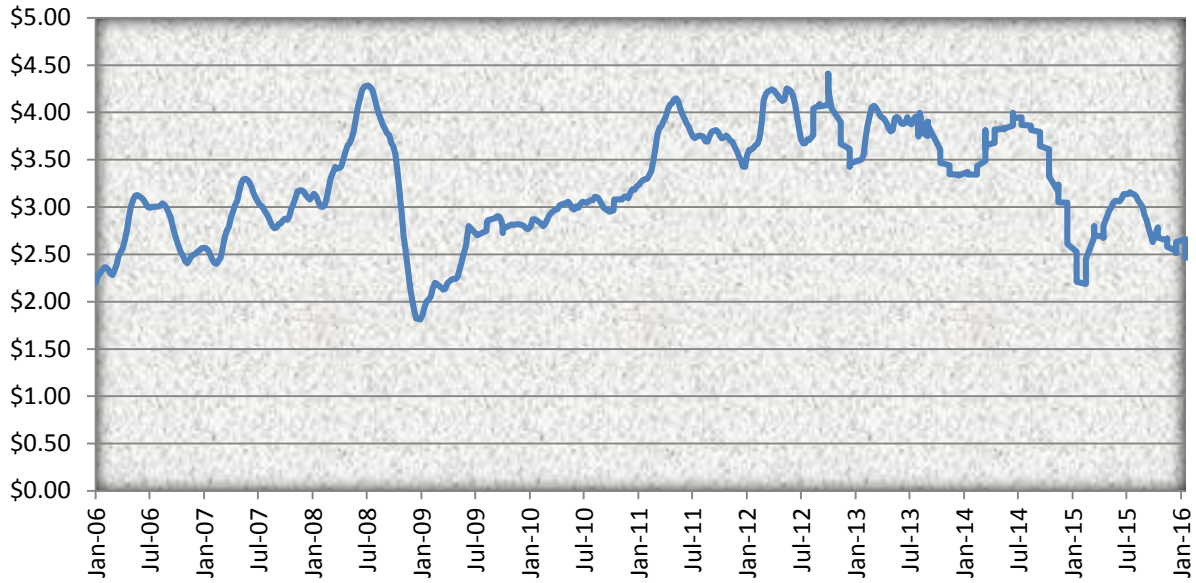
US Consumer Confidence Last 12 Months



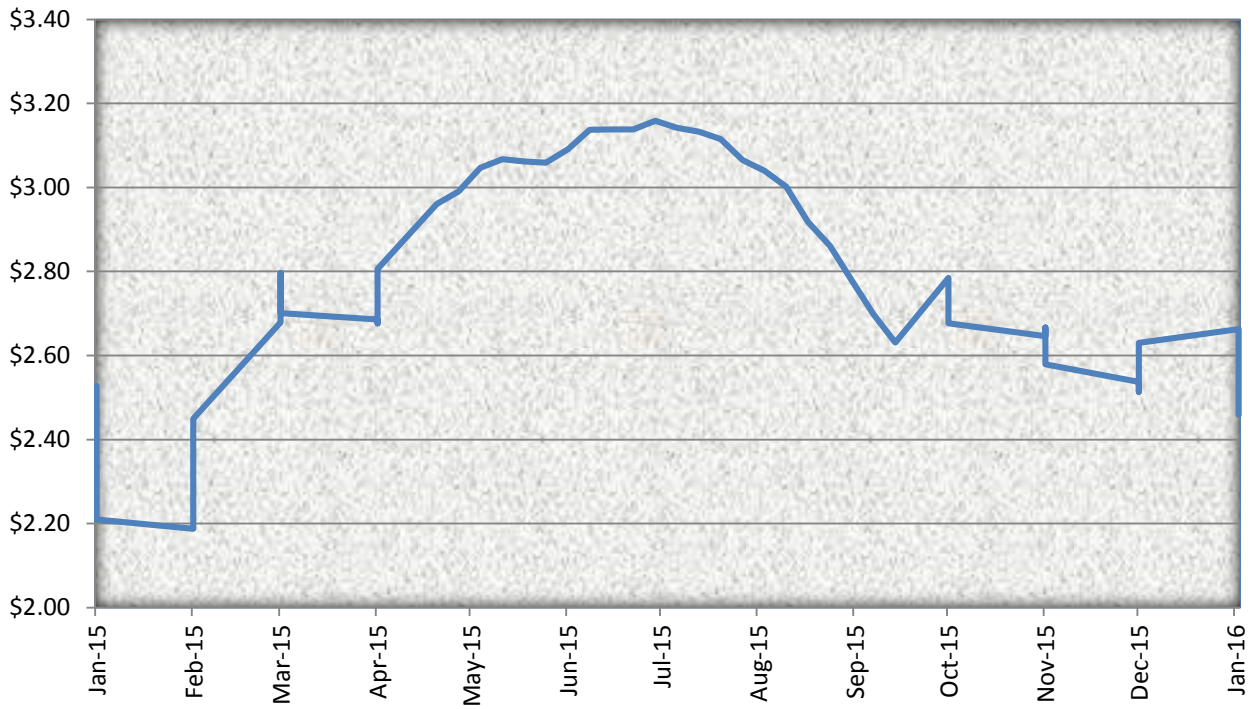
Sources: The Conference Board, University of Michigan

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West Coast Regular Gas Prices: 2005-Present

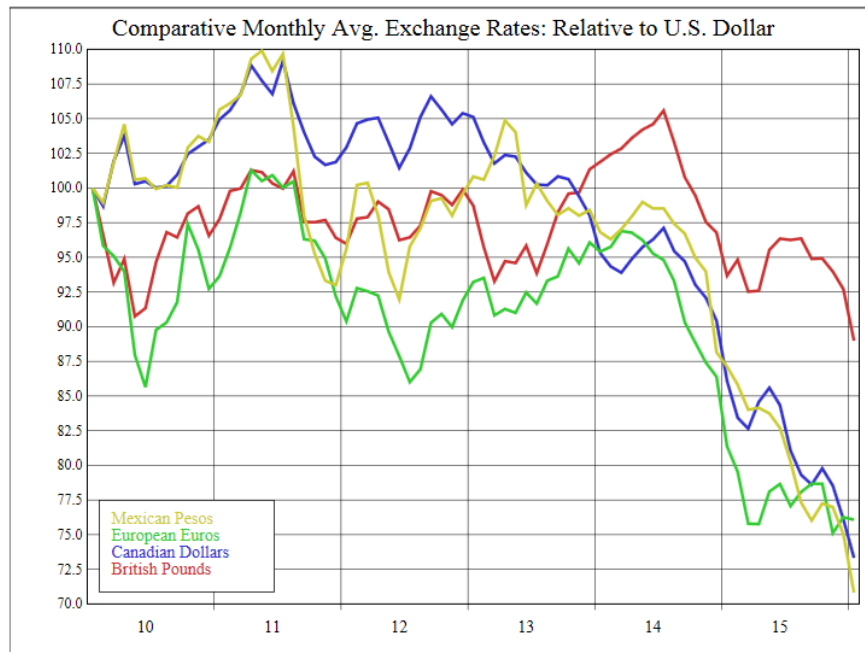
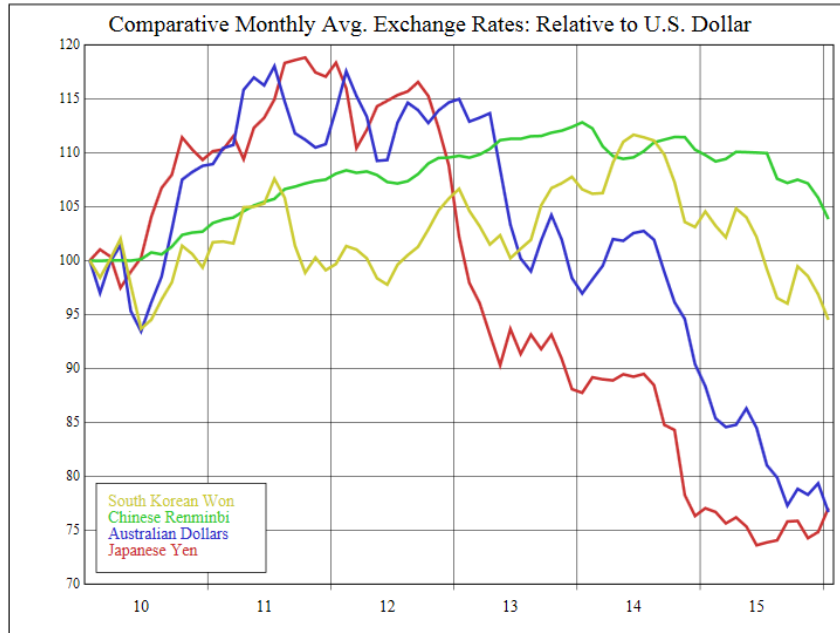


West Coast Regular Gas Prices: Last 12 Months



Source: Energy Information Administration

Exchange Rates
Relative Change Since 2010



Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

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FORECAST: INTERNATIONAL (February, 2016)

Annual International Trips to California											
(Annual % change)											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total	9.4%	8.8%	3.5%	4.5%	5.1%	3.0%	3.5%	4.0%	3.6%	3.8%	3.8%
China	57.1%	22.9%	42.8%	22.1%	21.5%	13.0%	11.9%	10.6%	9.4%	8.9%	8.7%
India	19.2%	1.2%	3.0%	26.3%	9.3%	7.1%	7.7%	11.0%	9.7%	9.2%	8.0%
Japan	19.3%	4.8%	1.7%	-4.0%	7.4%	-0.4%	1.4%	1.2%	1.4%	2.0%	1.8%
South Korea	47.7%	-5.4%	-1.7%	0.4%	2.0%	12.4%	1.8%	3.4%	3.7%	4.0%	3.6%
Australia	36.6%	11.3%	-5.1%	5.9%	6.4%	6.0%	1.6%	2.8%	3.0%	2.6%	2.7%
United Kingdom	3.2%	7.4%	-3.1%	2.6%	5.3%	5.0%	5.6%	3.2%	3.4%	3.0%	3.2%
Germany	12.5%	7.4%	-2.4%	5.7%	4.1%	2.3%	3.0%	3.4%	3.5%	3.3%	3.3%
France	37.1%	17.9%	-16.1%	4.0%	14.7%	1.9%	2.6%	2.8%	3.1%	3.2%	3.2%
Scandinavia	21.9%	14.2%	7.9%	7.0%	11.1%	4.6%	2.6%	3.5%	4.4%	4.1%	3.8%
Brazil	32.0%	34.9%	14.2%	12.8%	6.7%	2.2%	-0.2%	2.7%	3.1%	3.4%	3.6%
Canada	10.0%	8.8%	4.6%	1.6%	3.7%	-5.8%	1.6%	2.6%	3.0%	3.4%	3.5%
Mexico	1.8%	7.5%	5.7%	3.4%	1.3%	3.1%	2.6%	3.2%	2.7%	2.9%	3.0%
Rest of World	9.0%	-4.9%	-3.1%	5.4%	10.2%	2.1%	4.8%	5.1%	3.9%	4.0%	4.0%

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.

A Tipping Point for Travel, as Apps Overtake Mobile Web

Criteo’s latest mobile commerce report claims that a tipping point has been reached, with apps accounting for more travel purchases than the mobile web.

For the October to December quarter, Criteo found that, for travel purchases made from a mobile device, 58% were via an app — the first time apps have outperformed mobile web. Criteo’s global sample comprises 3,300 online travel and retail businesses, which handle 1.7 billion transactions a year and net sales of some \$17 billion, collectively.

Other than the 58% tipping point, travel specifics are thin on the ground, although with the industry zeitgeist around “acting like a retailer”, the findings are relevant in a bigger picture context.

Cross-device shopping is now the norm, and Criteo drills down deeply into this. In the US, people who complete their purchase on a tablet are the most likely to have used multiple devices before clicking the “buy now” button.



TRAVEL TRENDS/NEWS

- [The Adrenaline & Zen Cocktail: Resetting the Mind and Body](#)
 –Spafinder Wellness 365 2016 Trends Report

- [On Trend: River Cruises](#)
 –Media Post

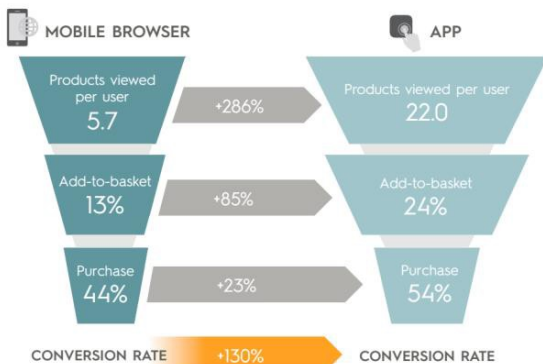
INTERNATIONAL TRENDS/NEWS

- [Nearly Half of Americans Will Cancel or Avoid Trips to Areas Affected by Zika Virus Outbreak](#)
 –Travel Industry Wire

CONSUMER TRENDS/NEWS

- [Streaming Natives: New Generations Have Different Online Video Experience](#)
 –Ericsson Consumer Insights, p. 5
- [Buying Time: Many Consumers Perceive Time as the Key Luxury](#)
 – Euromonitor International Global Consumer Trends 2016, p.6

Global Retail Conversion Funnel, by Channel



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