August 2016
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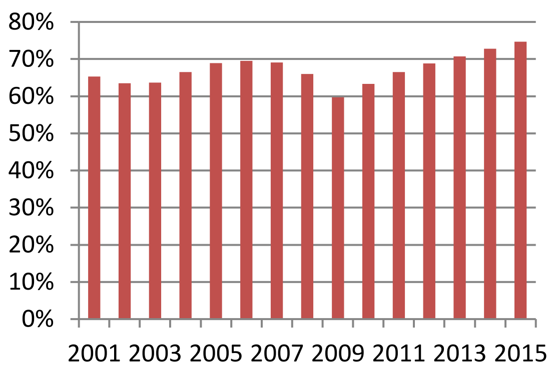
TOURISM INDUSTRY INDICATORS

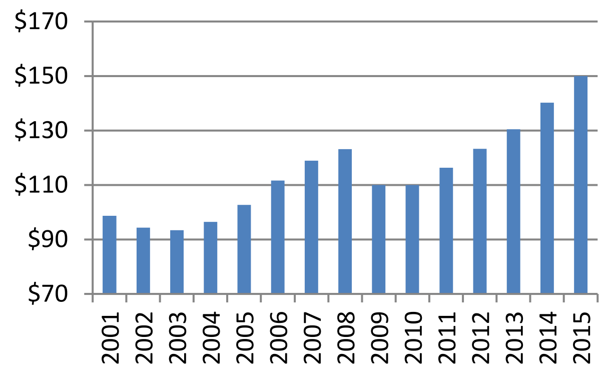
[Link to 'Latest Research' Web Page]

Detailed Lodging Tables

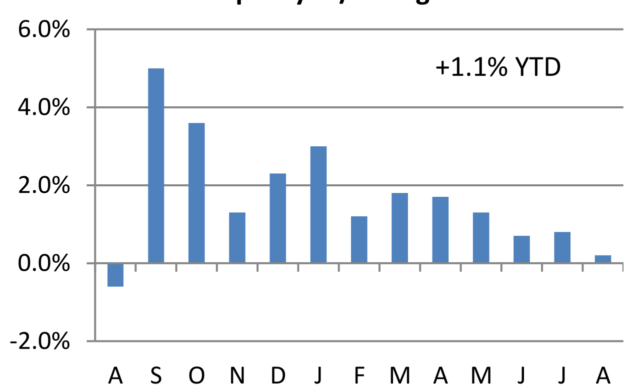
CA Occupancy: 2000-2015



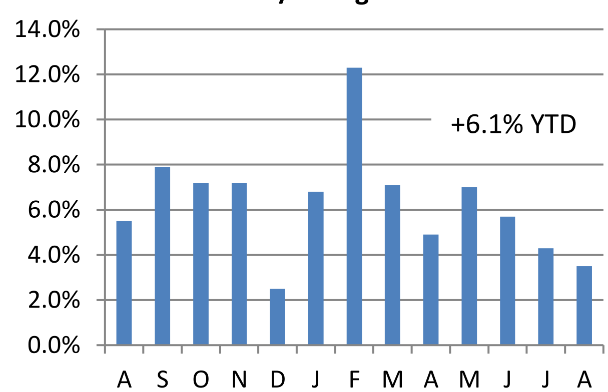
CA ADR: 2000-2015



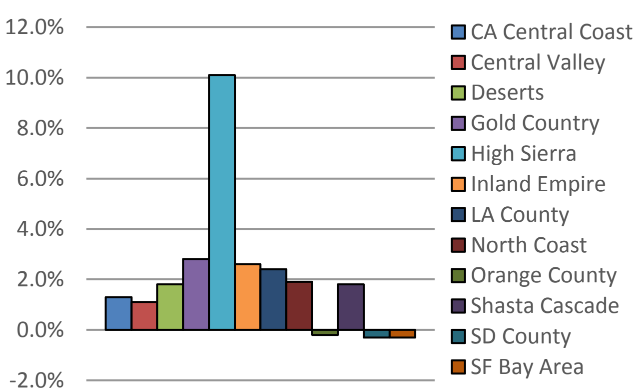
CA Occupancy Yr/Yr Chg: Last 12 Months



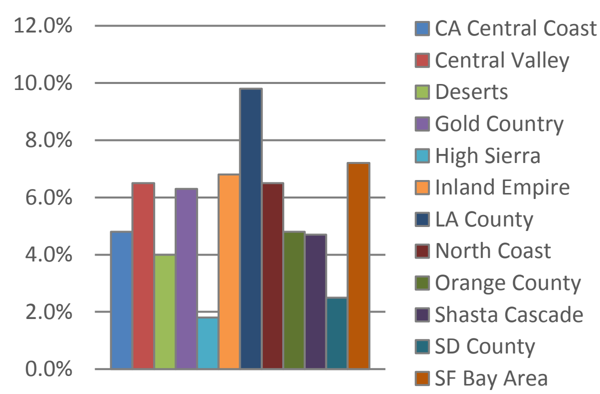
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg: August 2016



Regional CA ADR YTD Chg: August 2016



Source: Smith Travel Research

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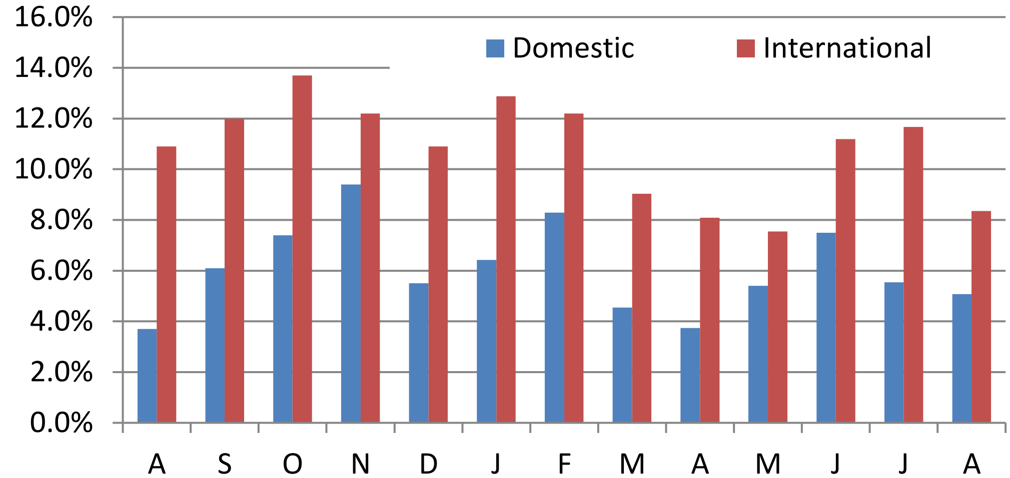
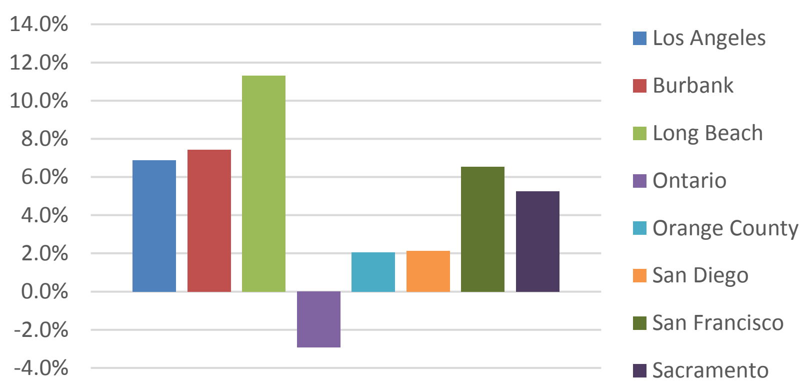
CA Airport Traffic Yr/Yr Chg: Last 12 Months

YTD
Domestic: 5.8 %
International: 10.1%



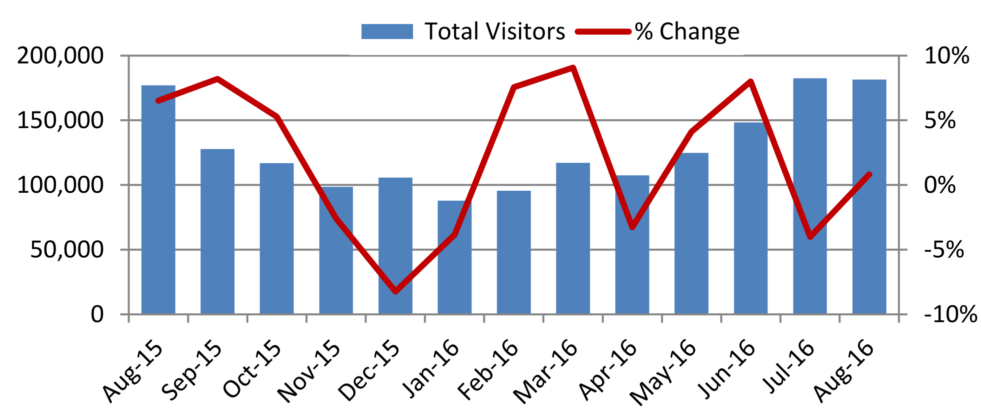
Total Passenger Arrival by Airport YTD Chg: August 2016

6.5% YTD



California Welcome Centers: Volume and Yr/Yr Change

YTD
Volume: 1.045.323
% Change: 1.9



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

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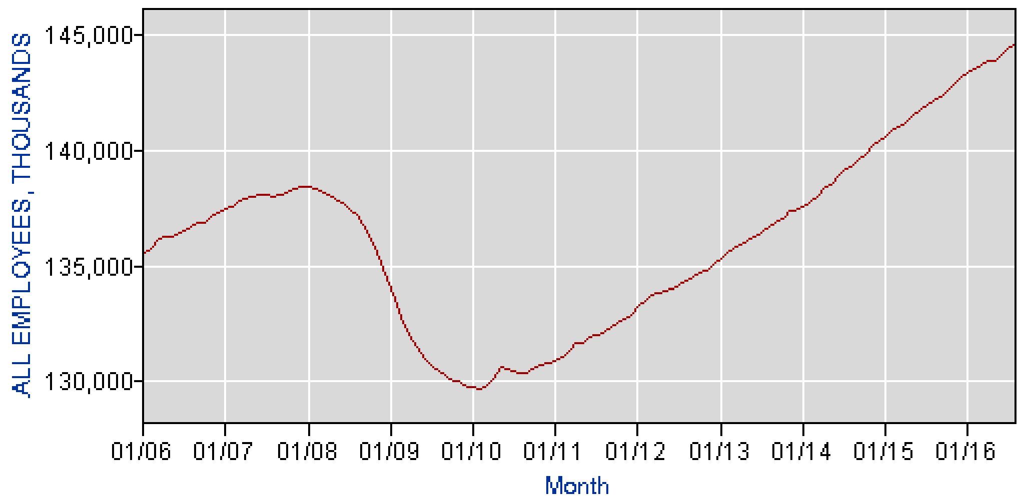
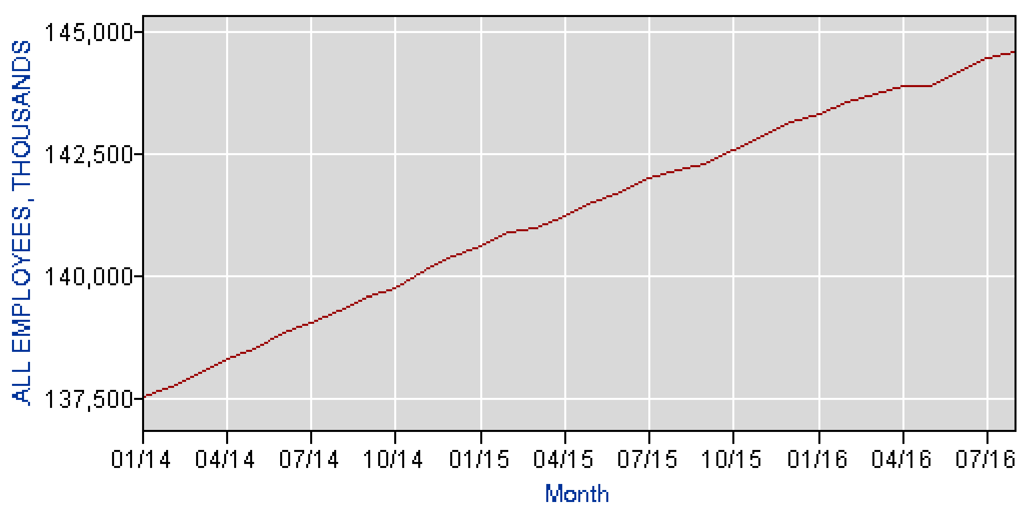
ECONOMIC INDICATORS: *DOMESTIC*

US Work Force: 2006-present



US Work Force: 2014-present



Source: Bureau of Labor Statistics; Survey Research Center

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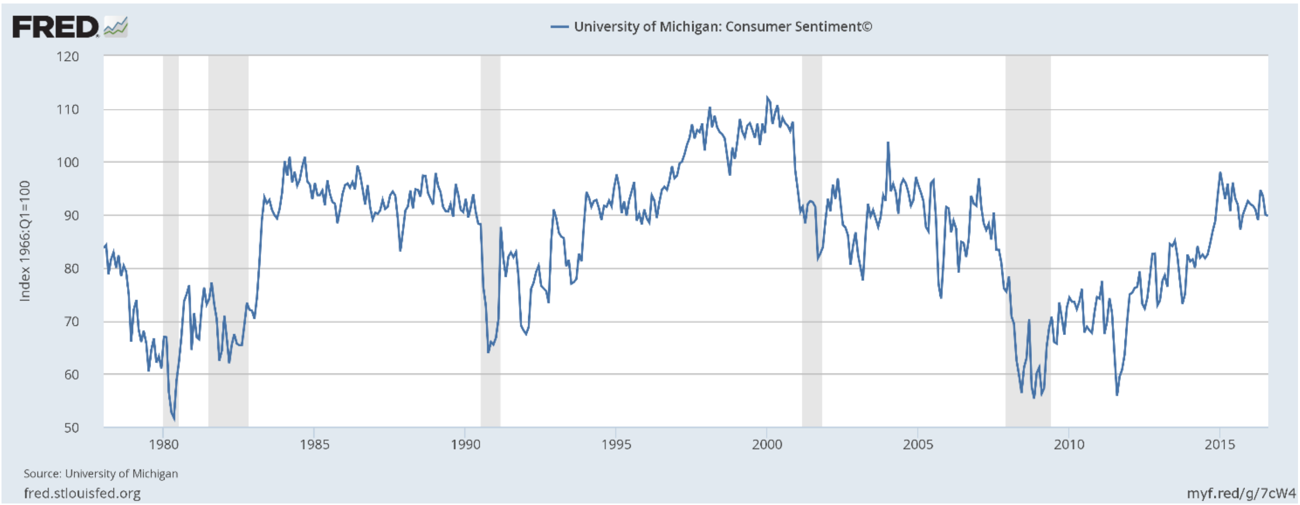
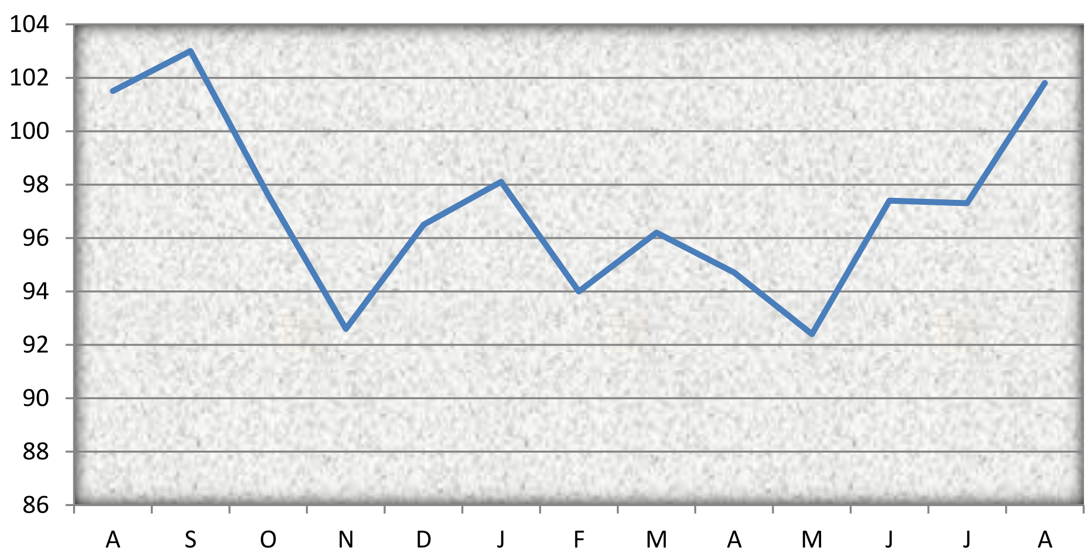
US Consumer Confidence: 1978-present



US Consumer Confidence Last 12 Months



Sources: The Conference Board, University of Michigan

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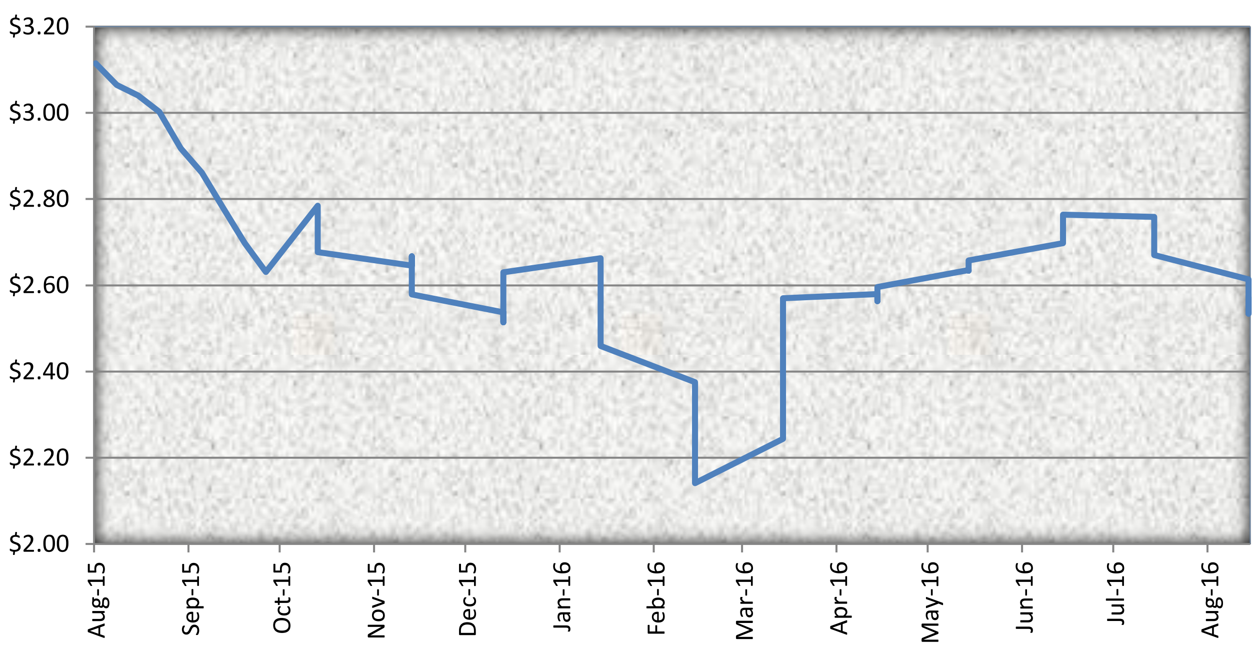
West Coast Regular Gas Prices: 2006-Present

West Coast Regular Gas Prices: Last 12 Months



Source: Energy Information Administration

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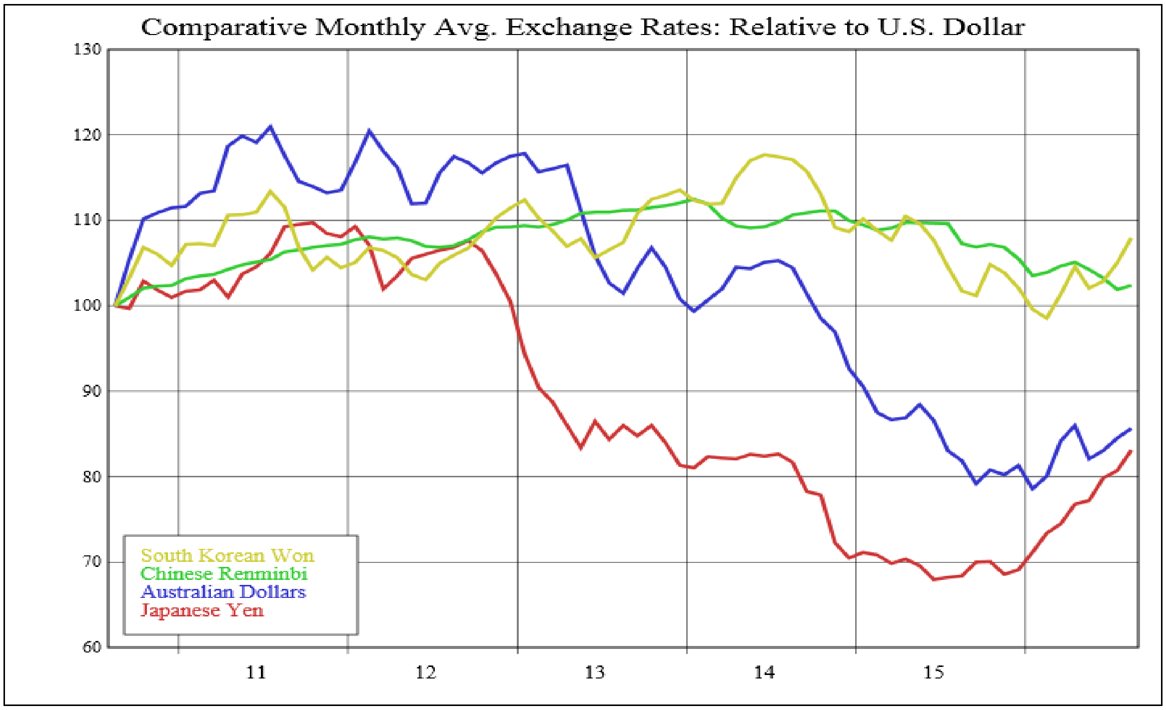
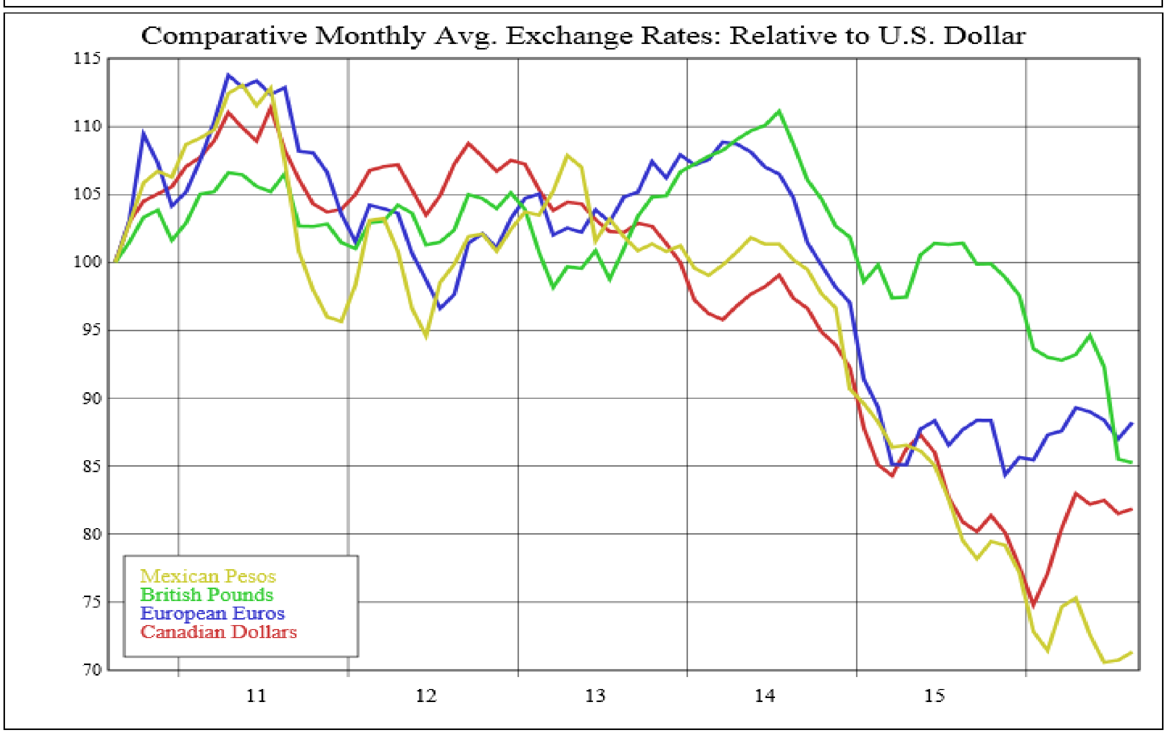
Exchange Rates

Relative Change Since 2010





Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

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INTERNATIONAL TRAVEL FORECAST

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

August 2016
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The State of the American Traveler

The recent summer edition of The State of the American TravelerTM explores issues related to differences in how the generations travel. We begin with a look at how American travelers are feeling about the near-term future, and show how much of the existing optimism is driven by the high-spirited Millennial generation. The report also examines the psychographic make-up of the generations, as well as their use of technology in travel planning.

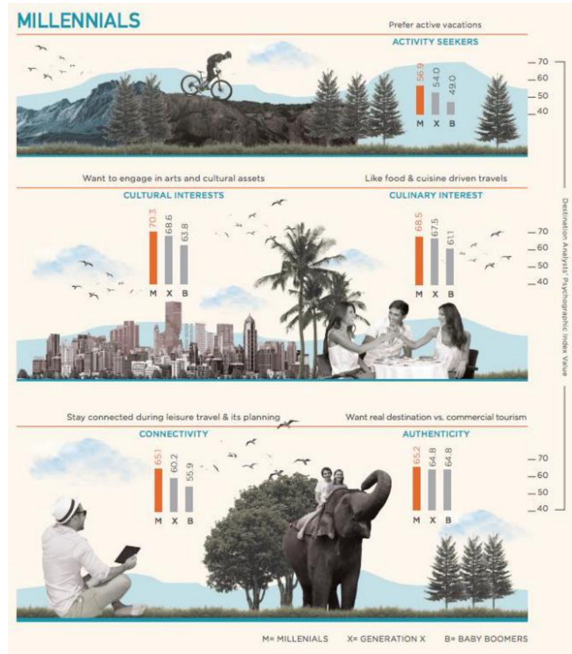
Out of this research was also born our Top 10 Tips for Marketing to the Generations, which highlights ways in which these insights can shape your strategies and make your travel marketing more effective.

Overall, American leisure travel expectations continue the stable path seen in recent years. While July results from our national survey show optimism about upcoming leisure travel has dipped slightly from a record high last summer (34.3% of American travelers said they would travel more in the coming year in

July '15 compared to 32.2% now), it remains in firmly positive territory. In fact, when considering the combined percent of leisure travelers expecting to travel more or the same in the upcoming year (compared to the previous year), this is actually up slightly to 92 percent from 91 percent last year. Similarly, leisure travel spending expectations remain high, signaling that prospects for a continued leisure travel performance are solid.

Travel optimism is driven in a major way by younger travelers. The charts below (see full report in link below) show the proportion of each of the four main generations that expect to travel more and spend more in the upcoming year. Major differences exist between the generations, with Millennials showing by far the most desire to increase their travel and spending. More than half of the Millennial generation expects to increase their travel and spending in the upcoming year, compared to only about one quarter of Baby Boomers."

Read the full State of the American Traveler™ report



Destination Analysts

TRAVEL TRENDS/NEWS

More Luxury Travelers Turn to Agents
–Travel Market Report

Social Media and the Travel Sector: Insights and tips for Travel Marketers
–Expedia

What Makes Millennial, Gen X, and Boomer Business Travelers Most Satisfied?
–Skift

INTERNATIONAL TRENDS/NEWS

Affluent Travelers and the Power of Hotel Loyalty in Four Charts
–Skift + YouGov

What Are the Factors Behind Soaring Air Travel Growth?
–Forbes