

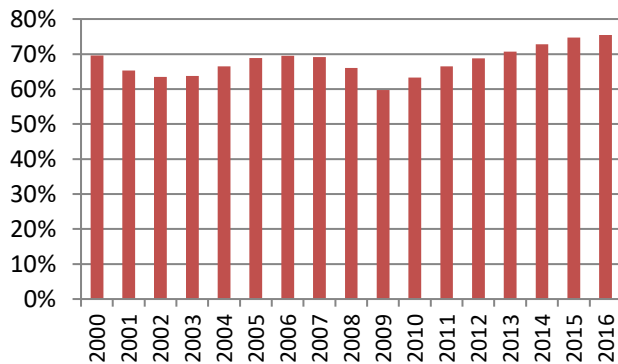
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TOURISM INDUSTRY INDICATORS

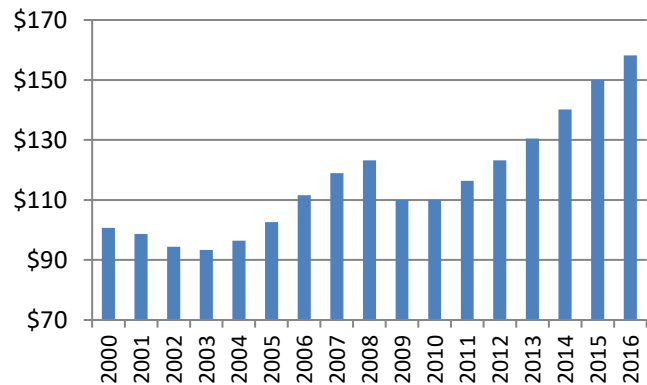
[Link to 'Latest Research' Web Page](#)

Detailed Lodging Tables

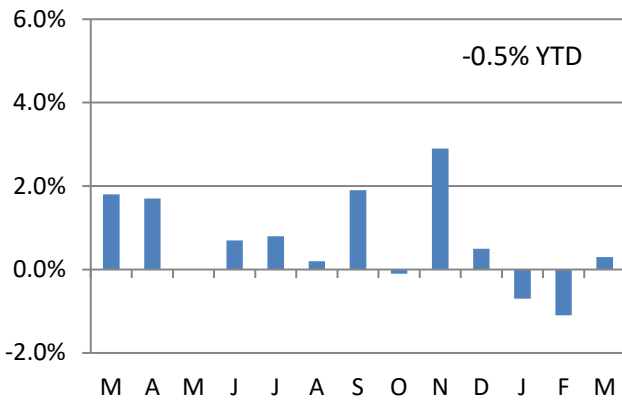
CA Occupancy: 2000-2016



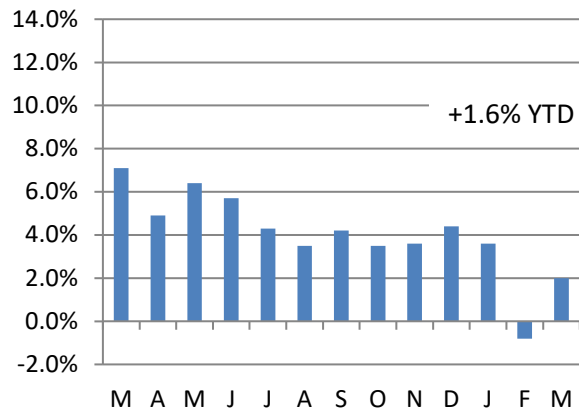
CA ADR: 2000-2016



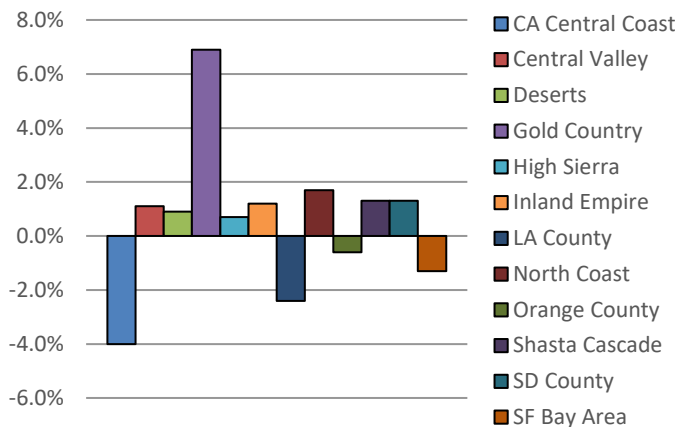
CA Occupancy Yr/Yr Chg: Last 12 Months



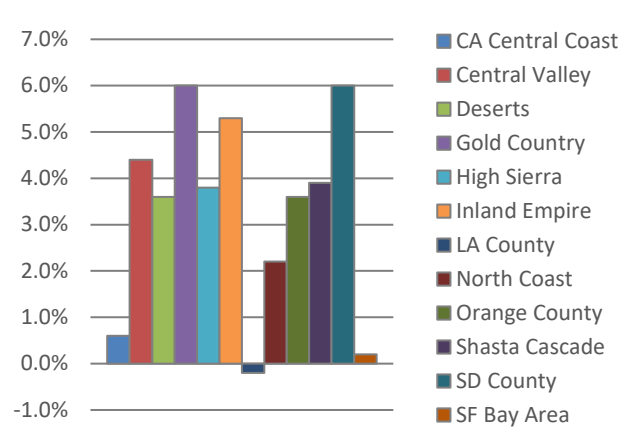
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg: March 2017



Regional CA ADR YTD Chg: March 2017

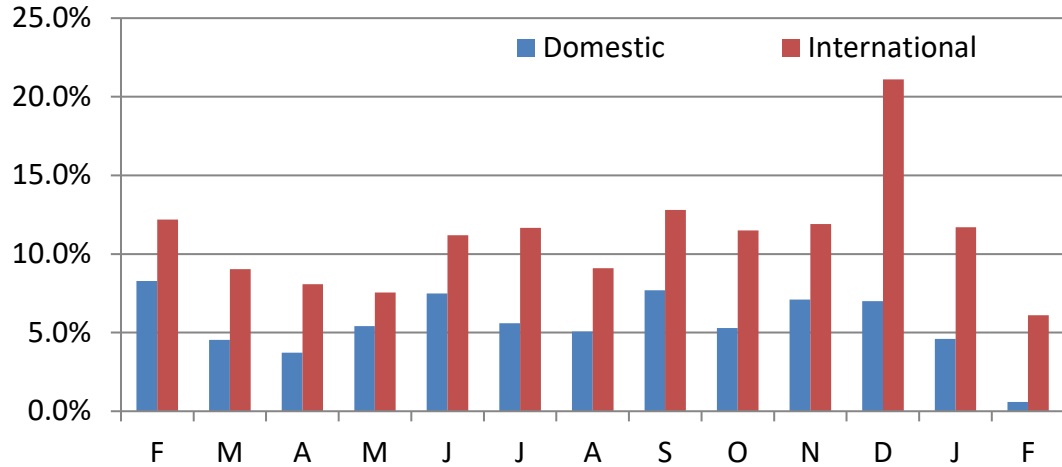


Source: Smith Travel Research

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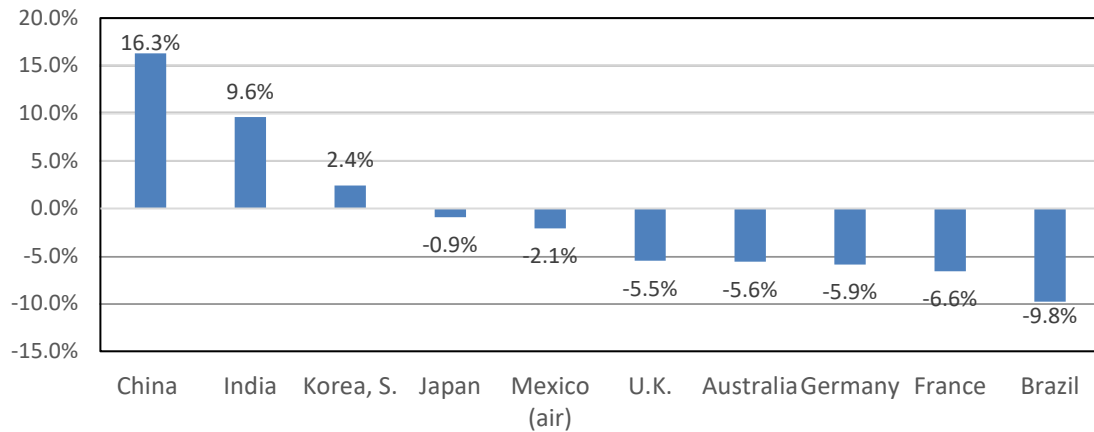
CA Airport Traffic Yr/Yr Chg: Last 12 Months

YTD
 Domestic: 2.7%
 International: 9.1%



Overseas Arrivals YTD % Change (through August, 2016)

Overseas total:
 2.2% YTD



California Welcome Centers: Volume and Yr/Yr Change

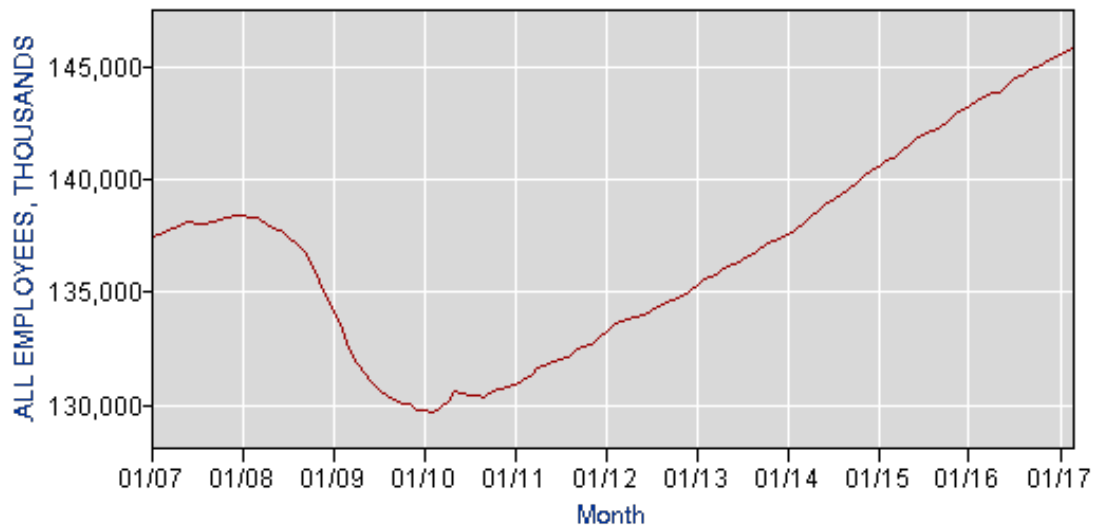
YTD
 Volume: 1,723,279
 % Change: 5.7



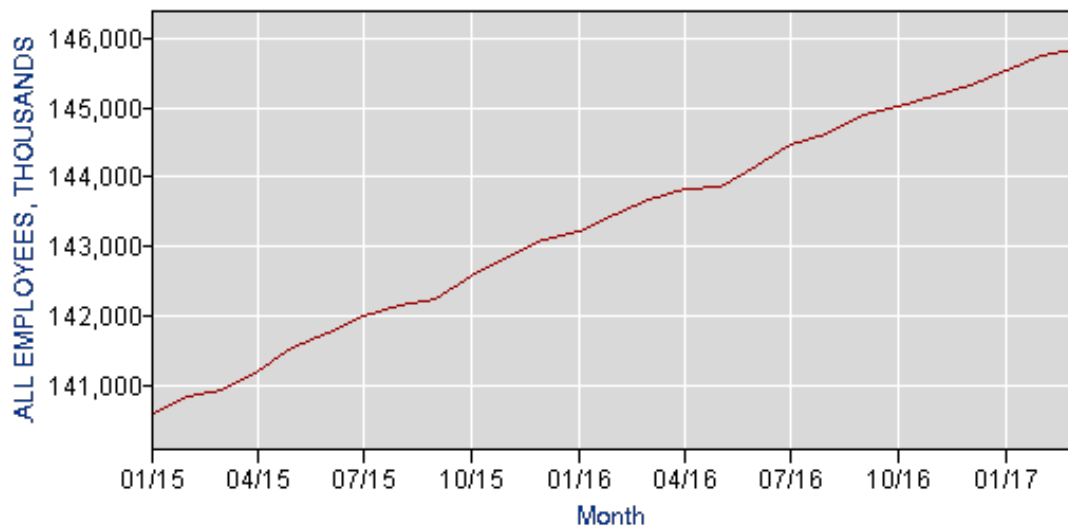
Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year. Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

ECONOMIC INDICATORS: DOMESTIC

US Work Force: 2007-present



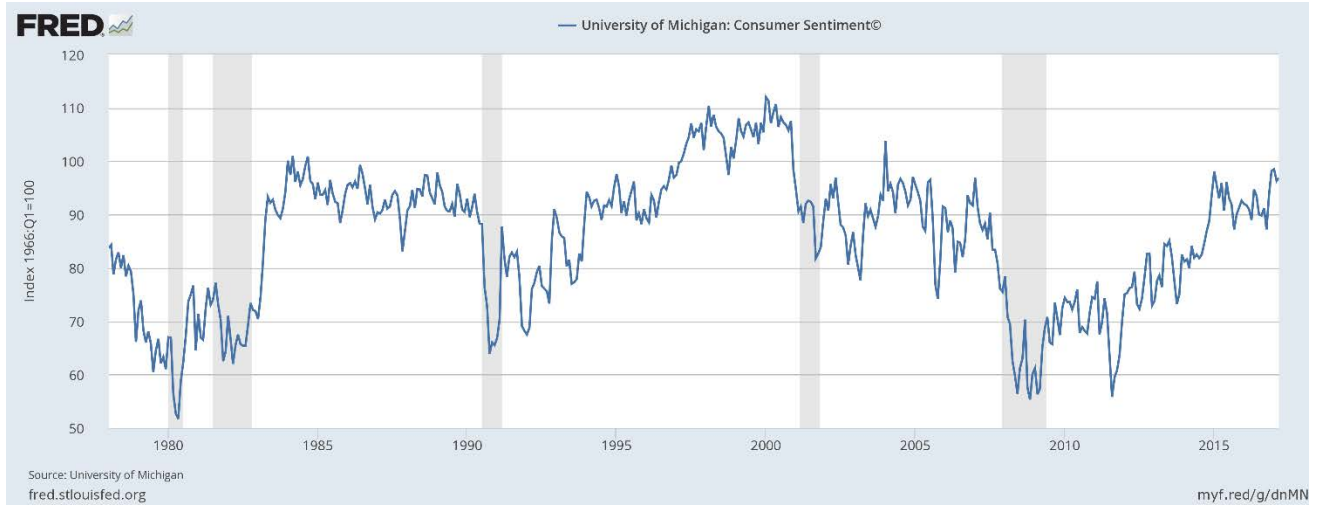
US Work Force: 2015-present



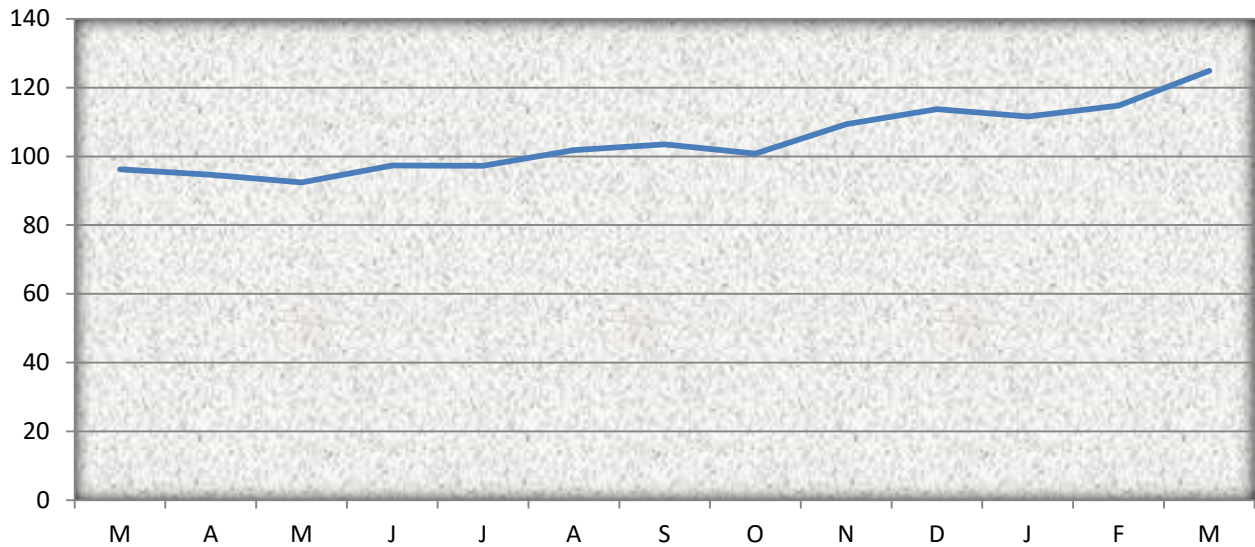
Source: Bureau of Labor Statistics; Survey Research Center

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US Consumer Confidence: 1978-present



US Consumer Confidence Last 12 Months



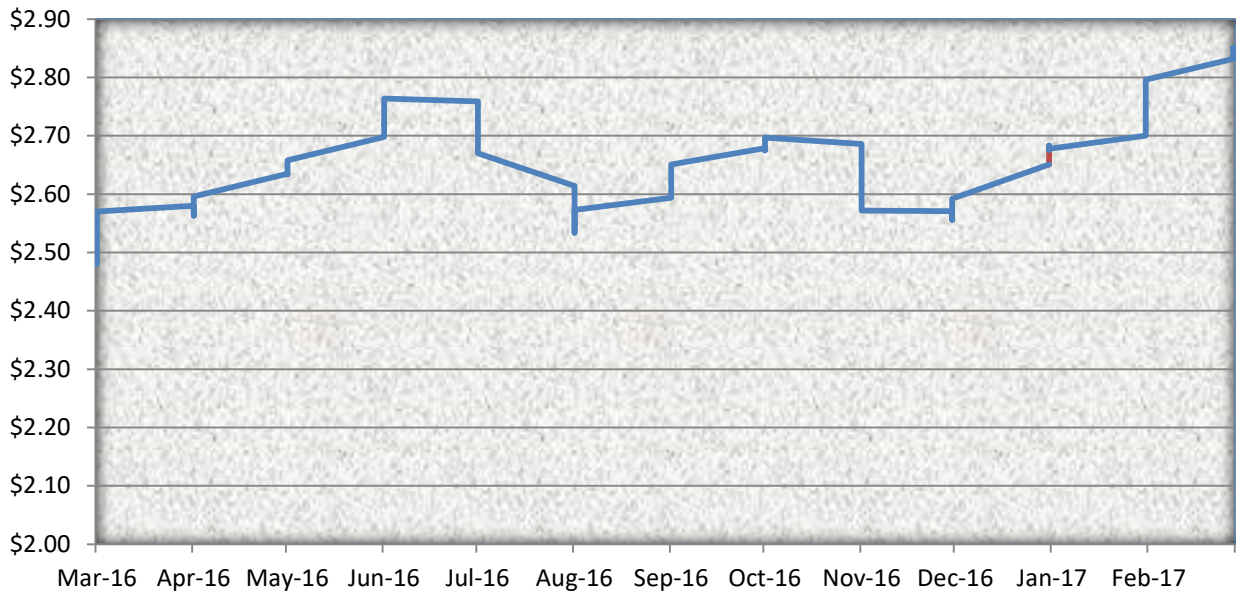
Sources: The Conference Board, University of Michigan

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West Coast Regular Gas Prices: 2007-Present

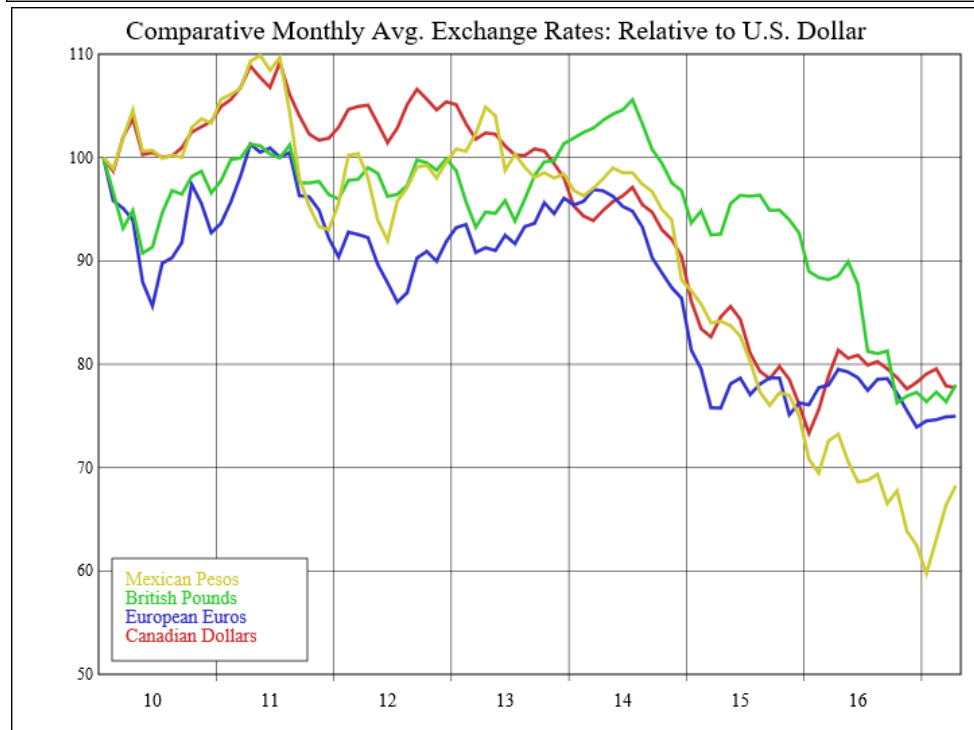
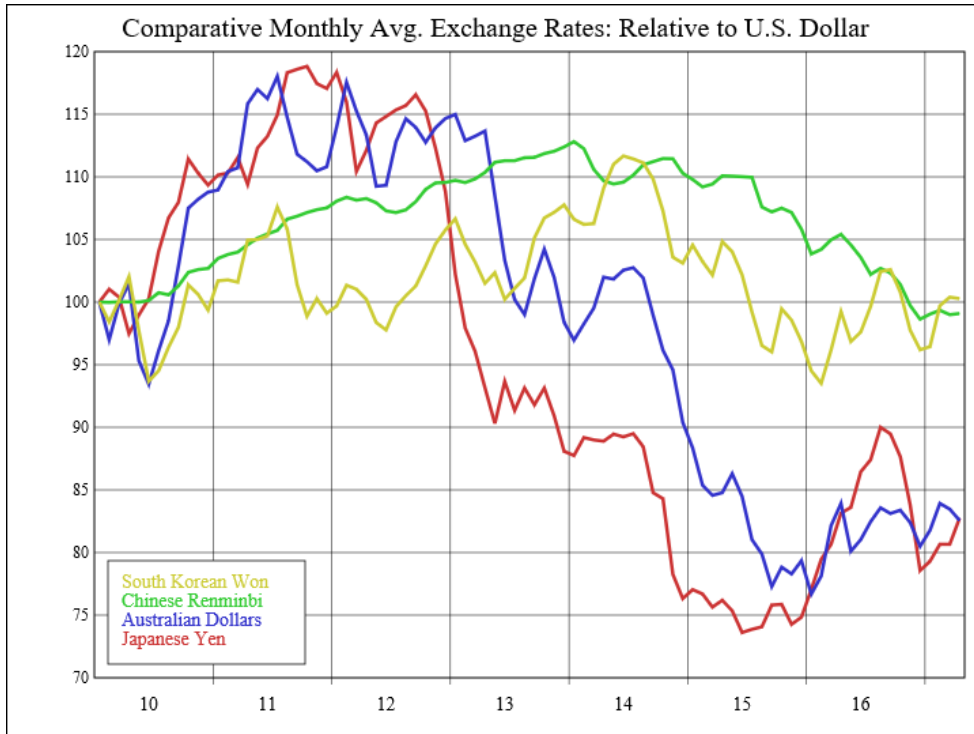


West Coast Regular Gas Prices: Last 12 Months



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.

Solo Travelers Around the Globe: What You Need to Know

Younger travelers on a budget from around the globe are taking short trips to visit family, escape routines, and explore new cities and more. And in the United States, the number of solo leisure travelers is growing.

Demographics

Solo leisure travelers around the world tend to be younger than the average tourist, though there are exceptions, said Mark Blutstein, research analyst at Phocuswright. ‘Around 47% (in the U.S.) are 18 to 34, but older travelers still do partake,’ he said. ‘Out of travelers that are 55 and older, about 28% of them will travel alone.’

Budget and level of education

According to Blutstein, solo travelers from the U.S. on average earn less than \$50,000 a year, which means they’re spending a lot less throughout a trip and aren’t looking to stay at an expensive hotel. He said they’re taking maybe three trips per year that last one to three nights, and ‘only spend about \$1,000 within all their trips throughout the year.’

He added that the majority of solo travelers have a college degree. ‘(Solo travelers) are very highly educated,’ he said. ‘That’s just a trend in the U.S. because more people are going to college and getting advanced degrees, and with that, they’re just starting their jobs, so they have a higher percentage in the lower income (bracket).’

Where they stay

Since many travel on a budget, solo leisure travelers often stay with friends and family or in shared accommodations, Blutstein said, but some do stay in hotels. Phocuswright research shows that 43% of U.S. solo travelers stayed in hotels during trips taken in the last year—compared to 21% in France, 28% in Germany, and 32% in the U.K., according to Blutstein.

Why they travel

Many travelers choose to fly solo on a trip because they want to be in control of their itinerary and immerse themselves in a new culture, sources said. Tomczek said solo travelers staying at Two Roads properties want to ‘feel like a local in the city they visit.’ ‘They want to dine at neighborhood spots, check out the under-the-radar shows and meet members of area start-up scenes,’ he said. ‘We’ve seen a shift from the relaxed escape vacation to trips that are more dynamic and memorable. This could mean having a meal with a host, learning to surf, attending a yoga retreat or even simpler, like a one-on-one language class or an off-hours tour.’”

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 –Expedia

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 –eMarketer

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 –World Travel & Tourism Council

[Overtourism and the Struggle for Sustainable Tourism Development](#)
 –Skift

[International Spending in the U.S. Set a New Record in January](#)
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