

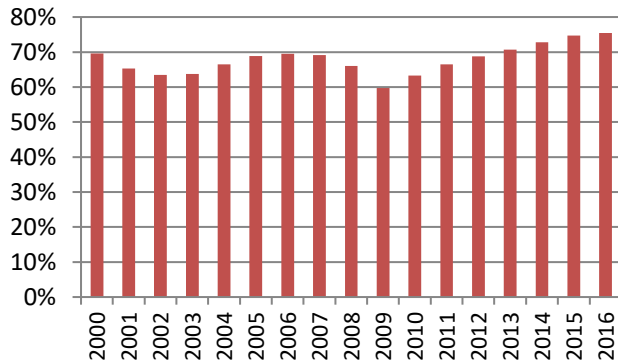
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TOURISM INDUSTRY INDICATORS

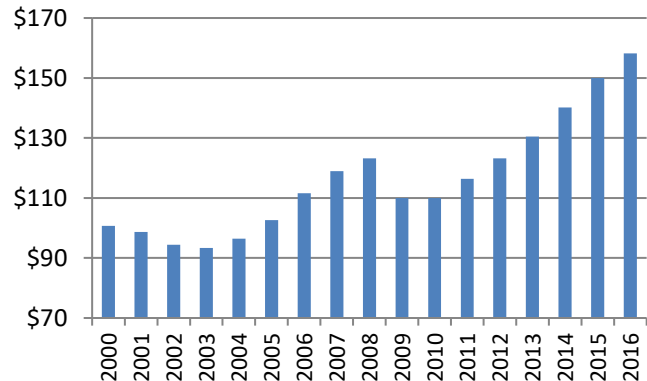
[Link to 'Latest Research' Web Page](#)

Detailed Lodging Tables

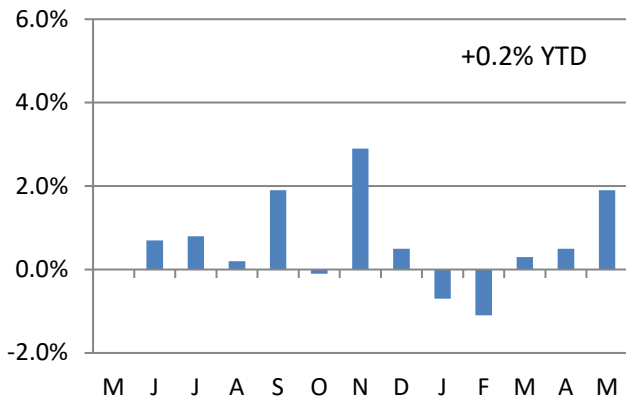
CA Occupancy: 2000-2016



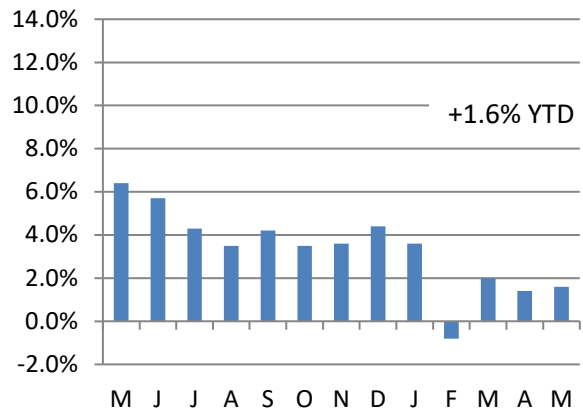
CA ADR: 2000-2016



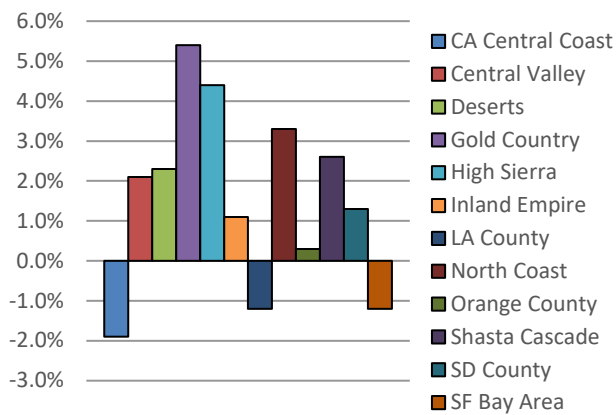
CA Occupancy Yr/Yr Chg: Last 12 Months



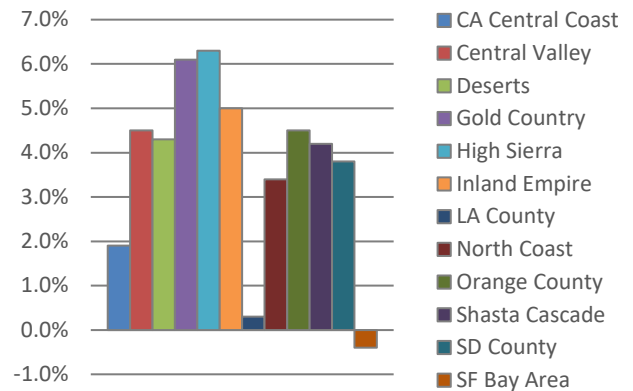
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg: May 2017



Regional CA ADR YTD Chg: May 2017

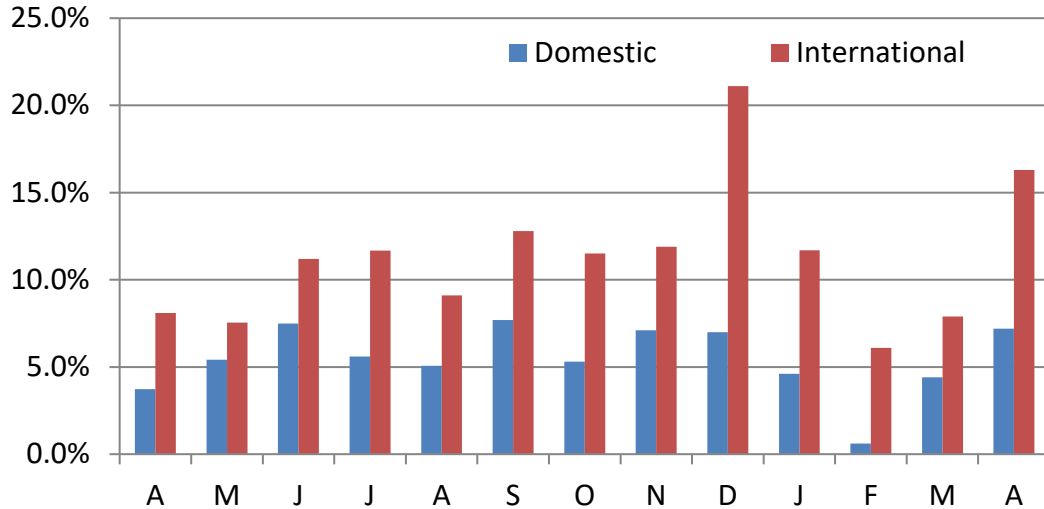


Source: Smith Travel Research

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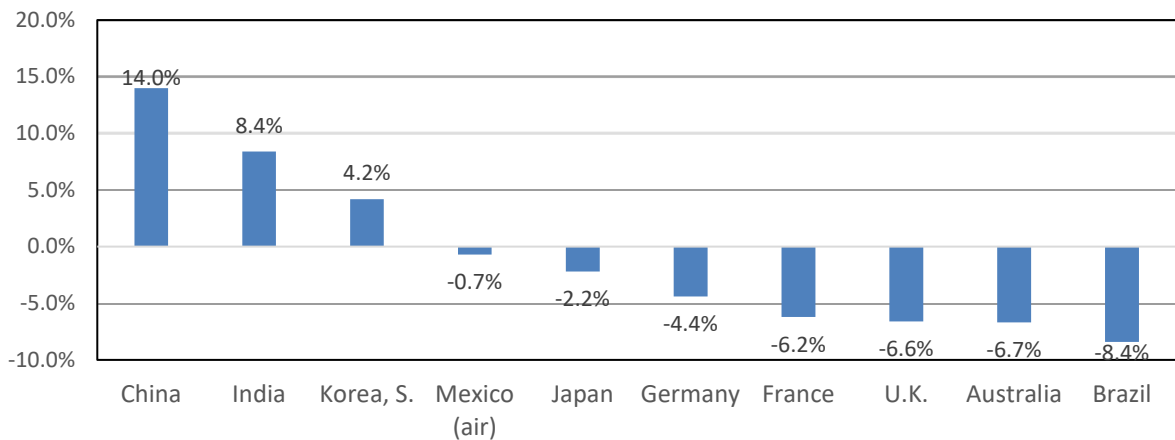
CA Airport Traffic Yr/Yr Chg: Last 12 Months

YTD
 Domestic: 4.3%
 International: 10.6%



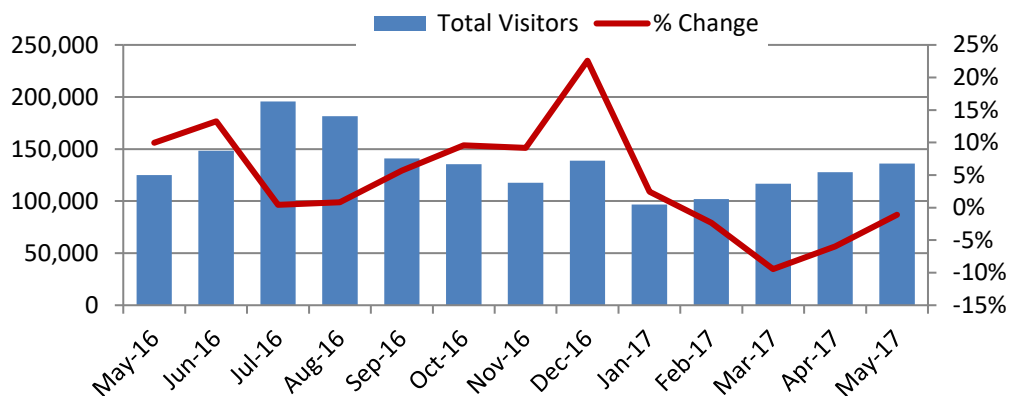
Overseas Arrivals YTD % Change (through September, 2016)

Overseas total:
 1.7% YTD



California Welcome Centers: Volume and Yr/Yr Change

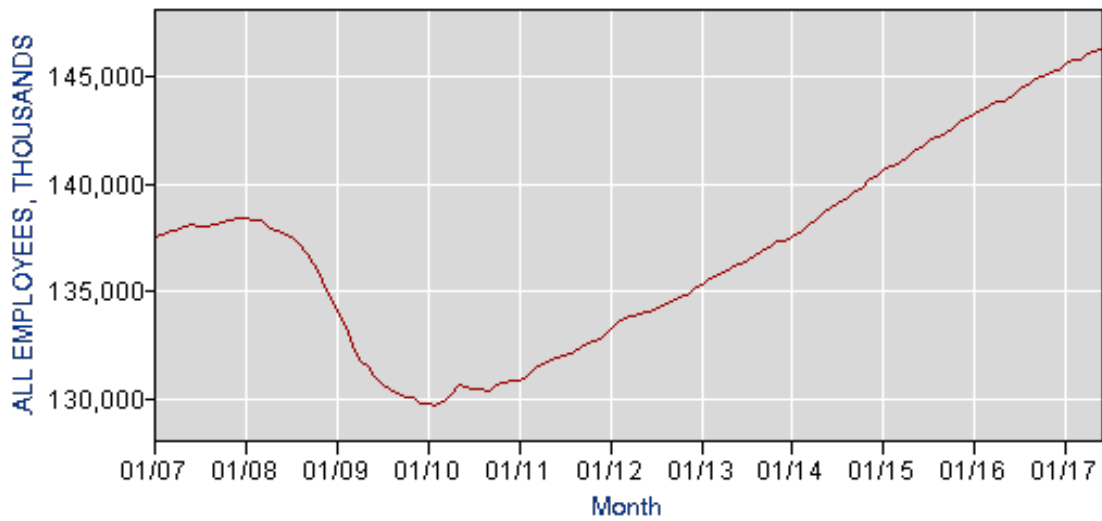
YTD
 Volume: 578,958
 % Change: -3.6



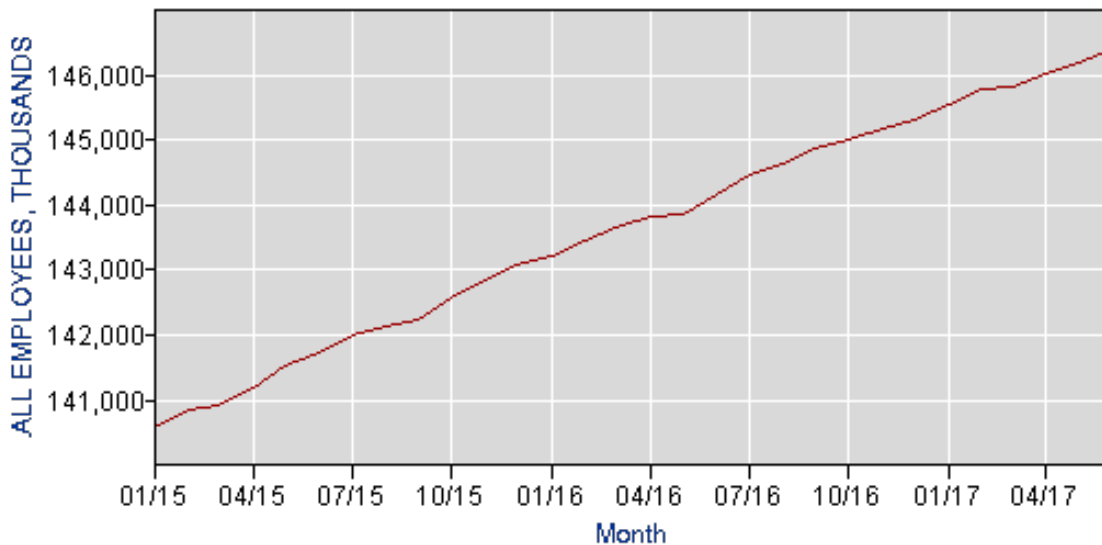
Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year. Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

ECONOMIC INDICATORS: DOMESTIC

US Work Force: 2007-present



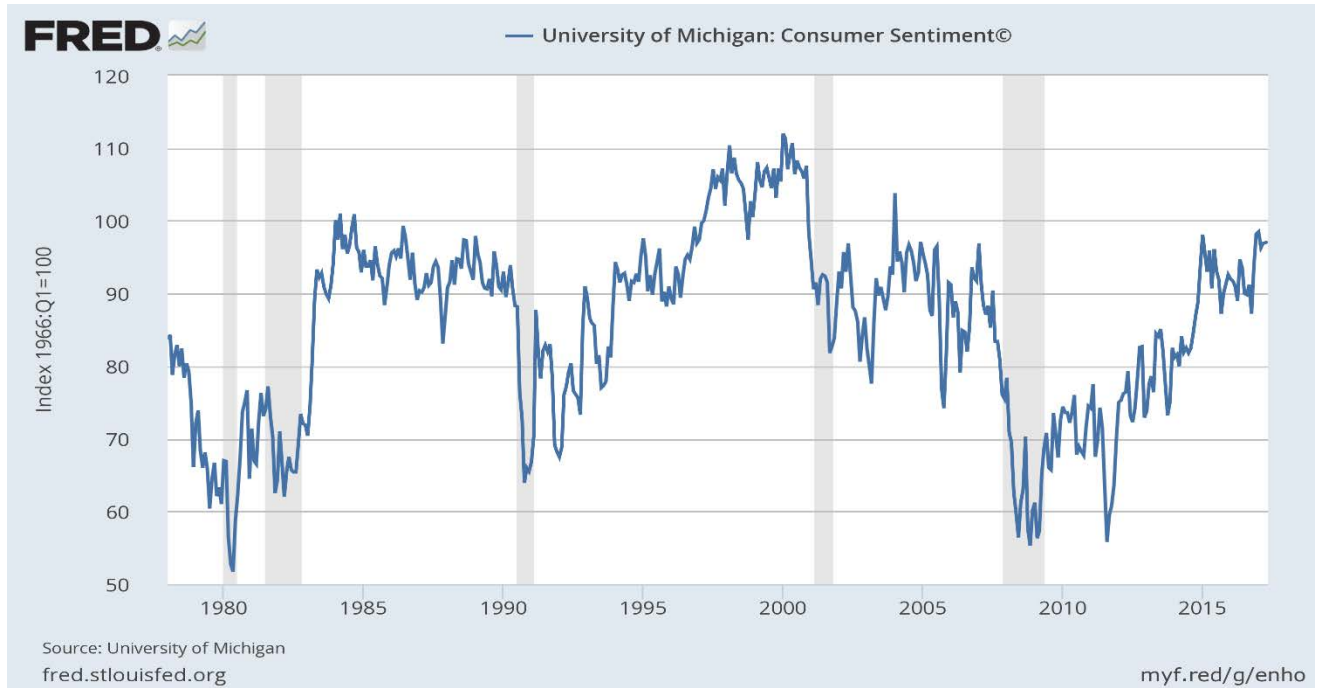
US Work Force: 2015-present



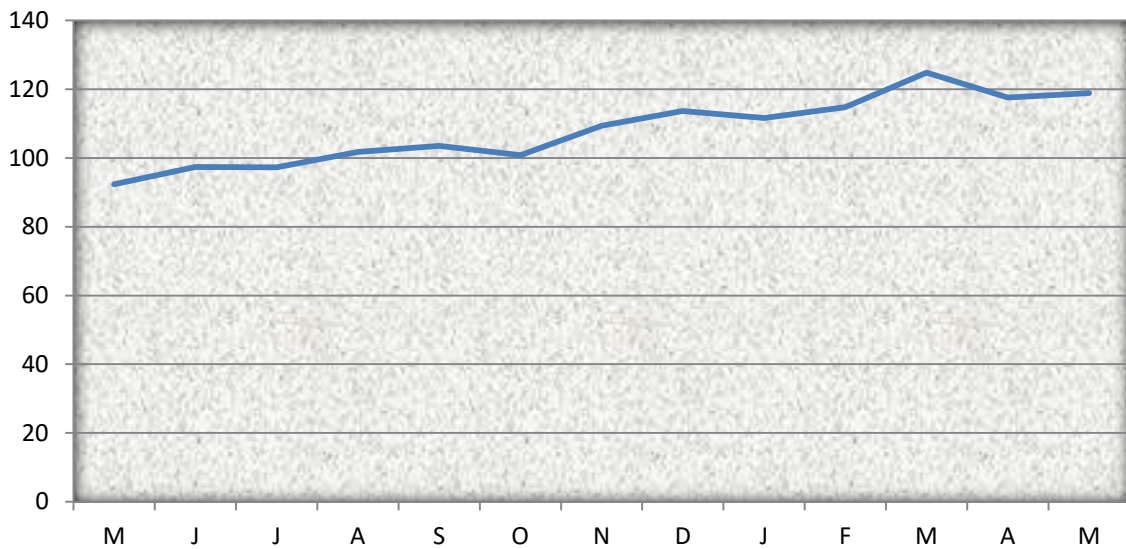
Source: Bureau of Labor Statistics; Survey Research Center

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US Consumer Confidence: 1978-present



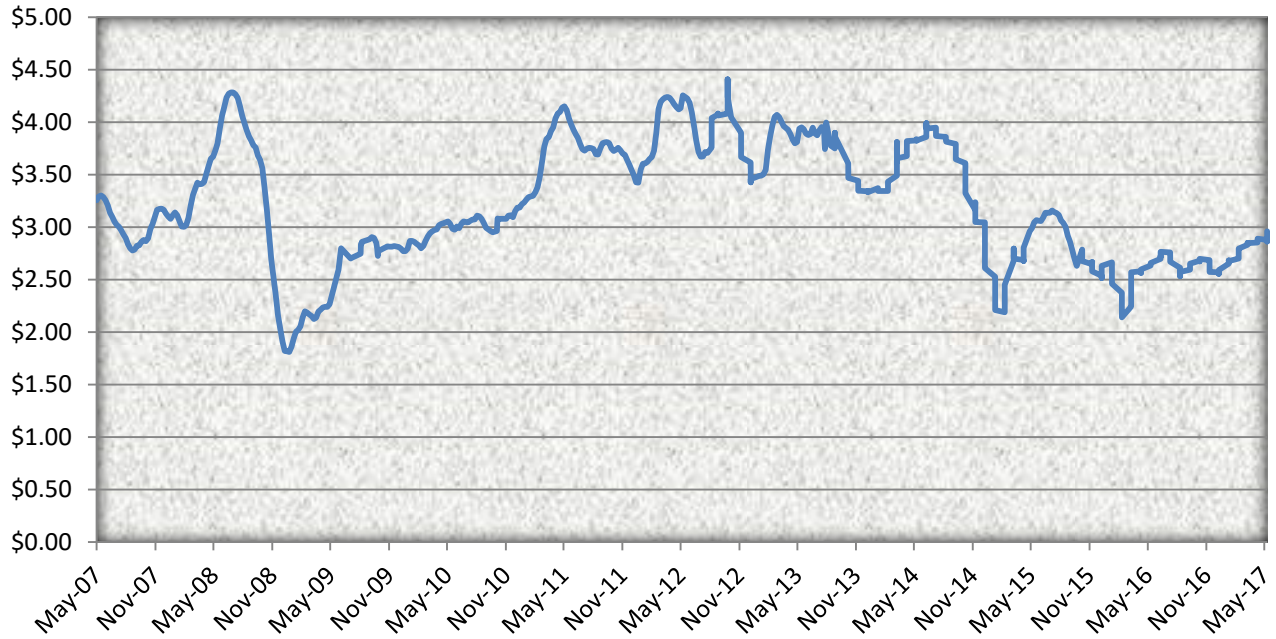
US Consumer Confidence Last 12 Months



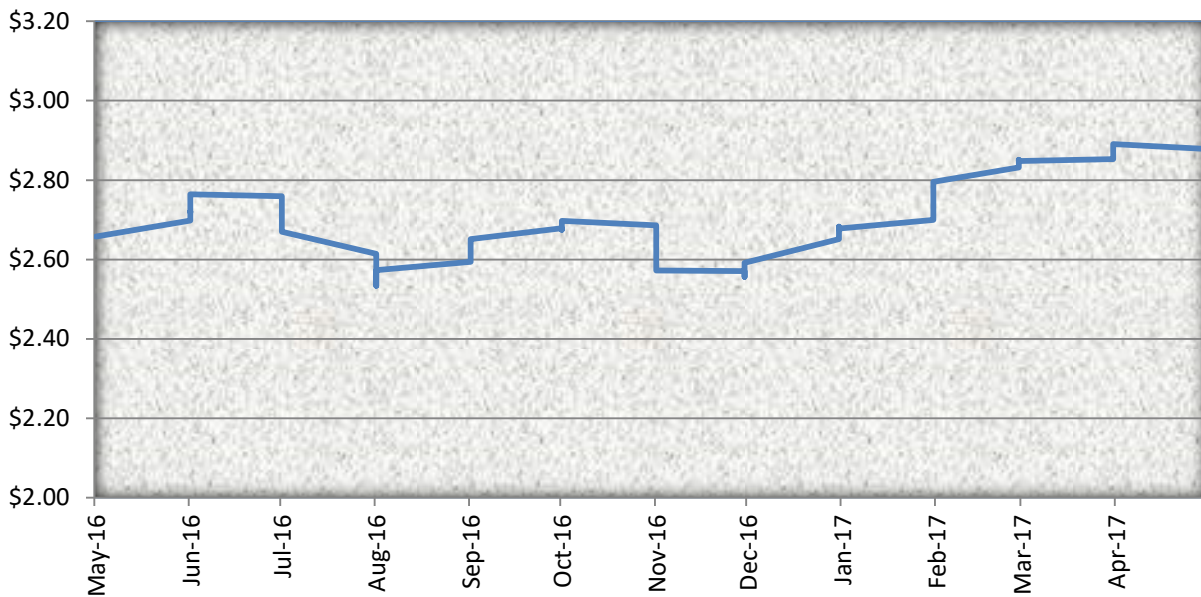
Sources: The Conference Board, University of Michigan

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West Coast Regular Gas Prices: 2007-Present

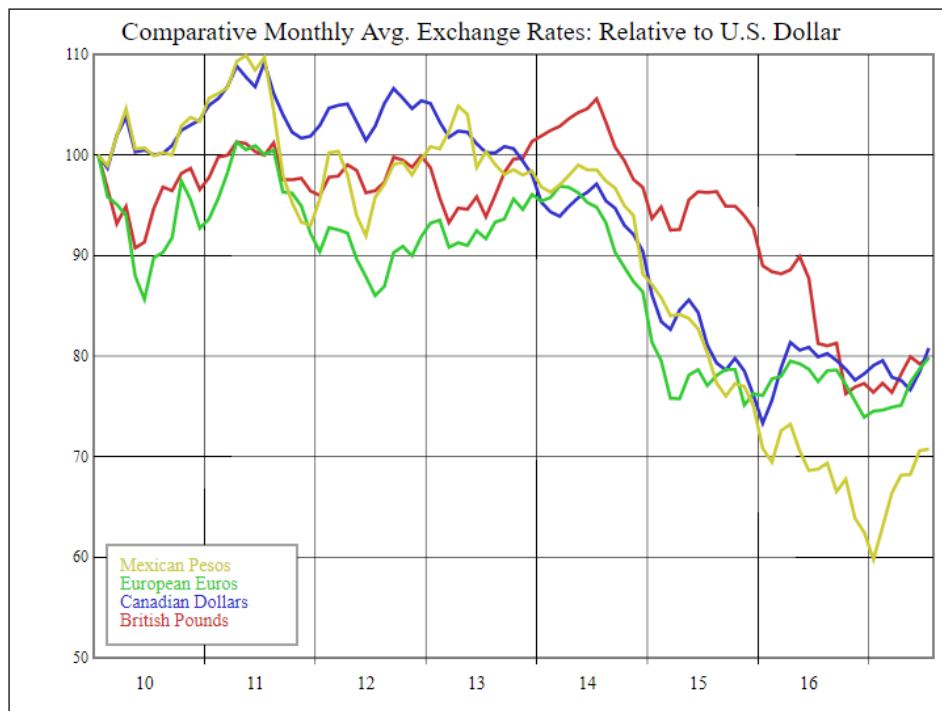
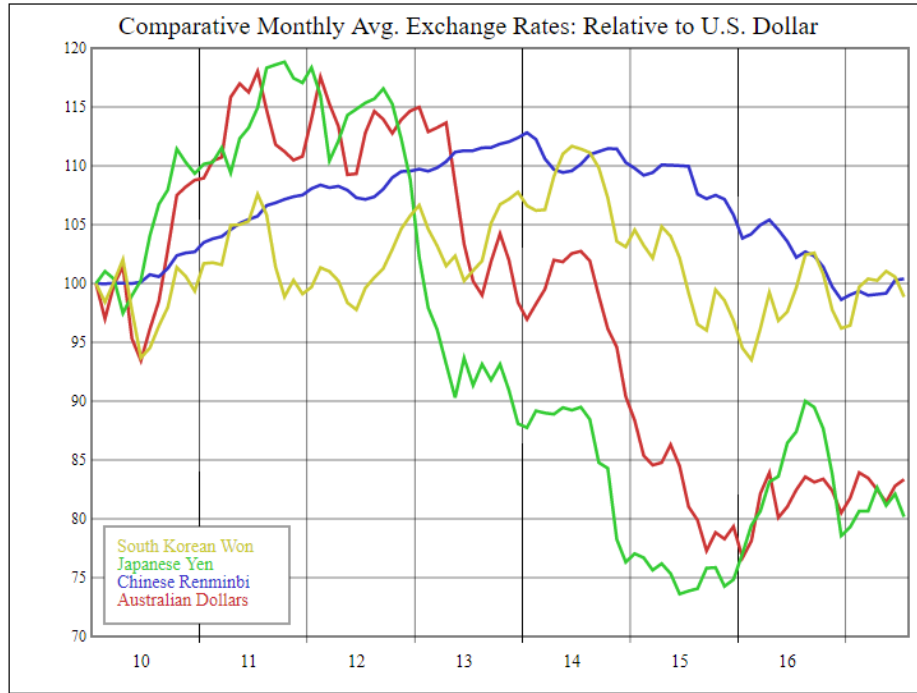


West Coast Regular Gas Prices: Last 12 Months



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.

The State of American Vacation 2017

American workers took an average of 16.8 days of vacation in 2016, according to new research from Project: Time Off, turning the trend line in a positive direction after losing almost a week of vacation time since 2000. The jump, up from 16.2 days in 2015, provides reason to be cautiously optimistic about America's vacation habits.

Taking time off continues to be a challenge in America's always-on work culture with more than half (54%) of employees ending 2016 with unused vacation time, a slight decrease from 2015 results (55%). These findings, from Project: Time Off's State of American Vacation 2017 report, provide the most comprehensive annual look at America's vacation habits based on GfK survey research of 7,331 U.S. employees who earn time off and economic analysis conducted by Oxford Economics.

While Americans are taking more vacation time, there is also a slight increase in the number of days left unused. In 2016, 662 million vacation days were left on the table, four million days more than 2015.

The Economics of Vacation Time

The jump in vacation usage from 16.2 to 16.8 days delivered a \$37 billion total impact to the U.S. economy.

Remedy for Unused Days: Planning

The increase in vacation usage may be tied to the majority of Americans (54%) planning their time off. Workers who set aside time to plan their vacation days are more likely to take all of their time off (52% to 40%).

Reworking Work Culture

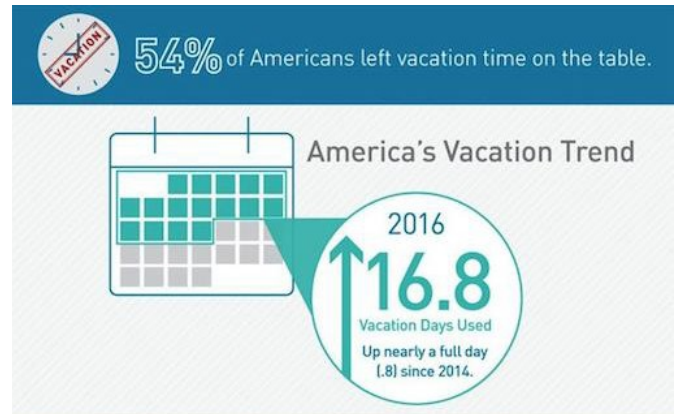
Thirty-eight percent of employees said they want to be seen as a work martyr by their boss, but they are less likely (79% to 84%) to report receiving a raise or bonus and are no more likely to have received a promotion in the last year than the average worker (28% to 28%).

Gender and Job Title Predict Vacation Habits

Nearly all (96%) American employees say vacation is important to them, yet there is a disparity based on gender and seniority in vacation usage and perceptions of workplace vacation culture.

[Read article on Hotel New Resource](#) or download the full [State of America Vacation 2017 Report](#)

TRAVEL TRENDS/NEWS



Project: Time Off

TRAVEL TRENDS/NEWS

- [Are We There Yet? Ford Explores the Reinvention of the Great American Road Trip](#)
– Ford Motor Co.
- [Boomers Plan to Travel More Than Any Other Generation This Summer](#)
– DK Shifflet, Hotel News Resource

CONSUMER TRENDS/NEWS

- [Competitive, Independent and Definitely Not Millennials](#)
– DK Shifflet, Hotel News Resource
- [Men Are Spending More in the Luxury Sector Than Women, Research Shows](#)
– Skift

INTERNATIONAL TRENDS/NEWS

- [United States Projected to Lose \\$1.3 Billion in Travel-Related Expenditures in 2017](#)
– Hotel Trends