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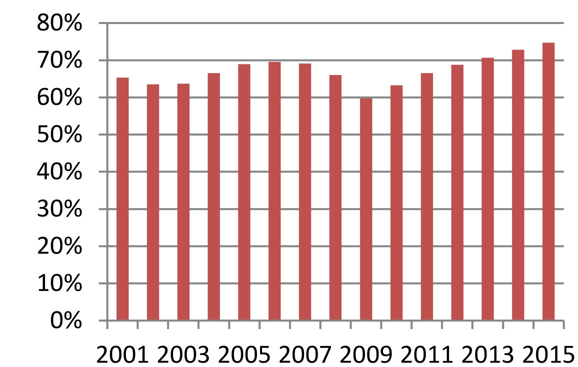
## TOURISM INDUSTRY INDICATORS

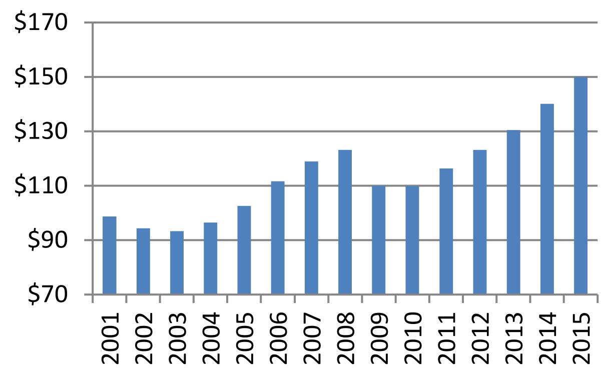
*Link to 'Latest Research' Web Page*

### Detailed Lodging Tables

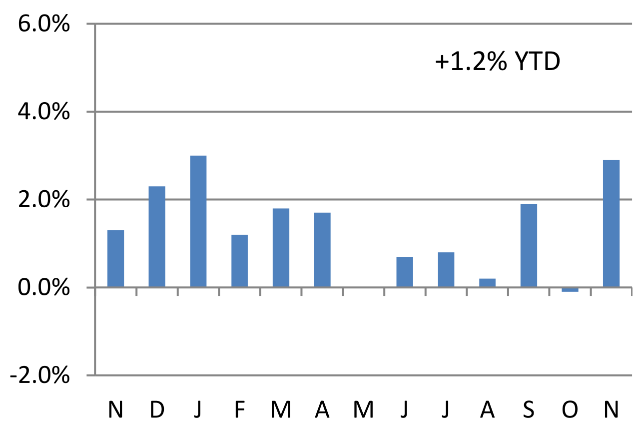
**CA Occupancy: 2000-2015**



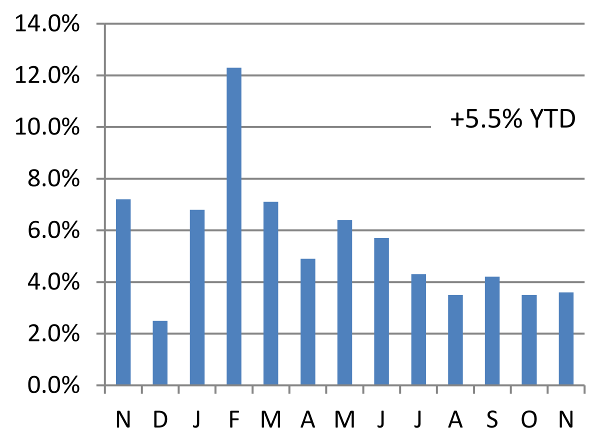

**CA ADR: 2000-2015**



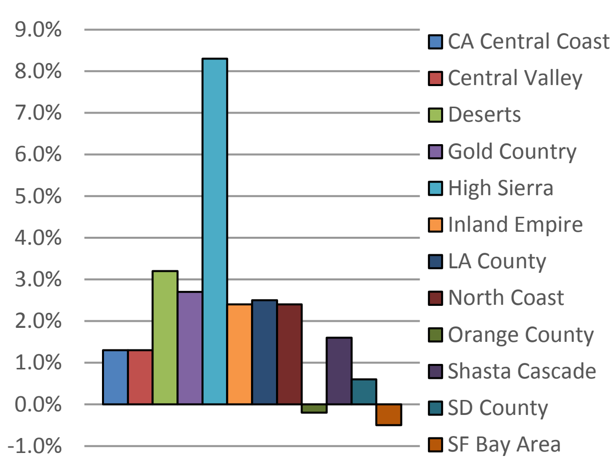

**CA Occupancy Yr/Yr Chg: Last 12 Months**



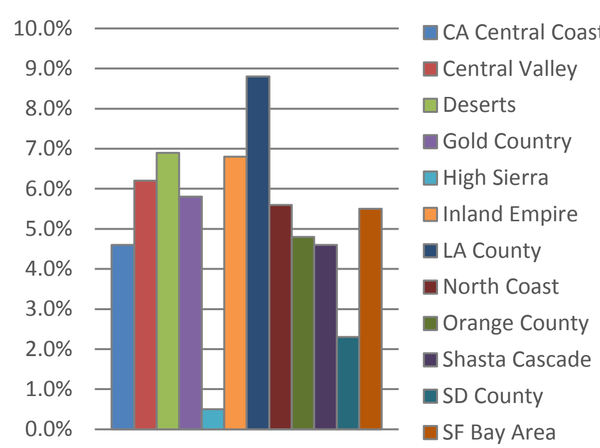

**CA ADR Yr/Yr Chg: Last 12 Months**




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




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




*Source: Smith Travel Research*

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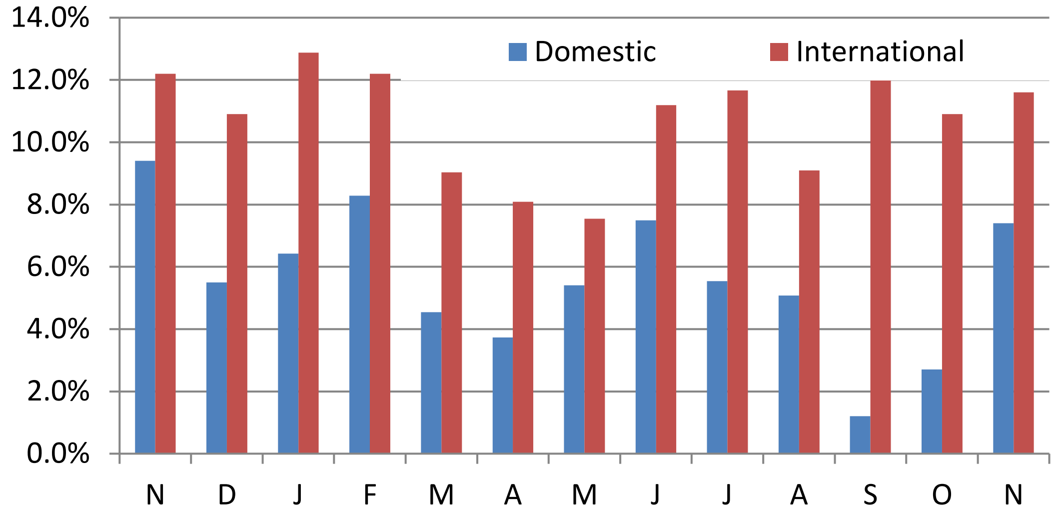
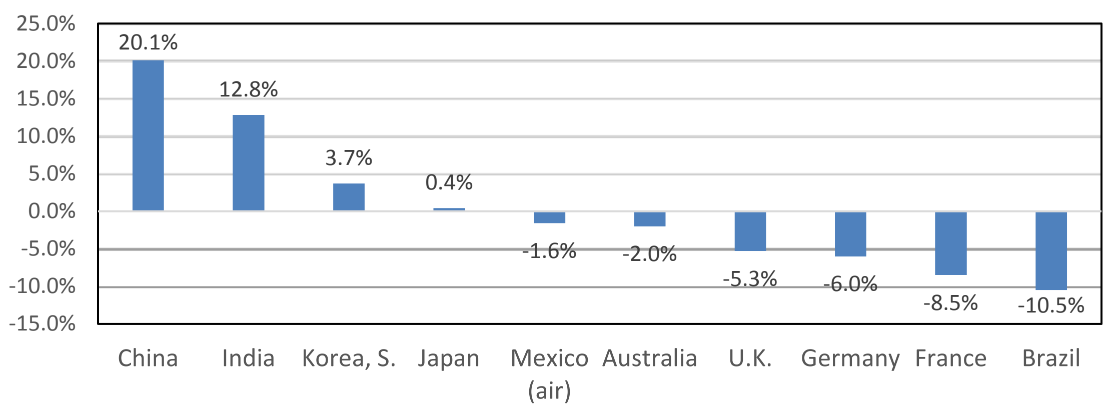
### CA Airport Traffic Yr/Yr Chg: Last 12 Months

*YTD*
*Domestic: 6.3%*
*International: 10.6%*



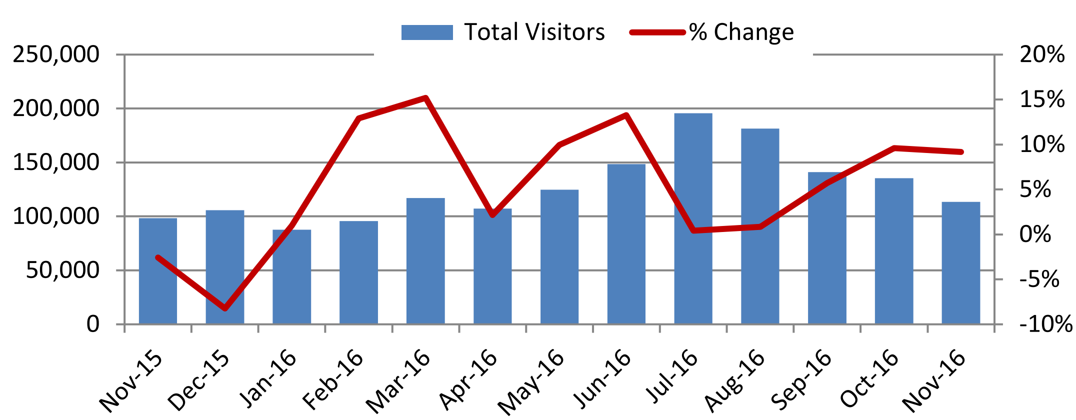

### Overseas Arrivals YTD % Change (through June, 2016)

*Overseas total:*
*3.4% YTD*




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

*YTD*
*Volume: 1.448.389*
*% Change: 6.6*




*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*

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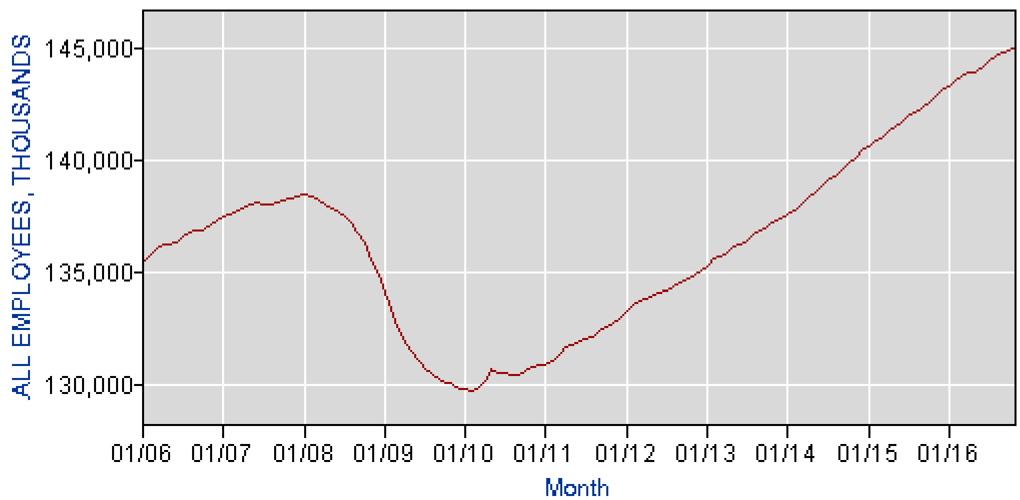
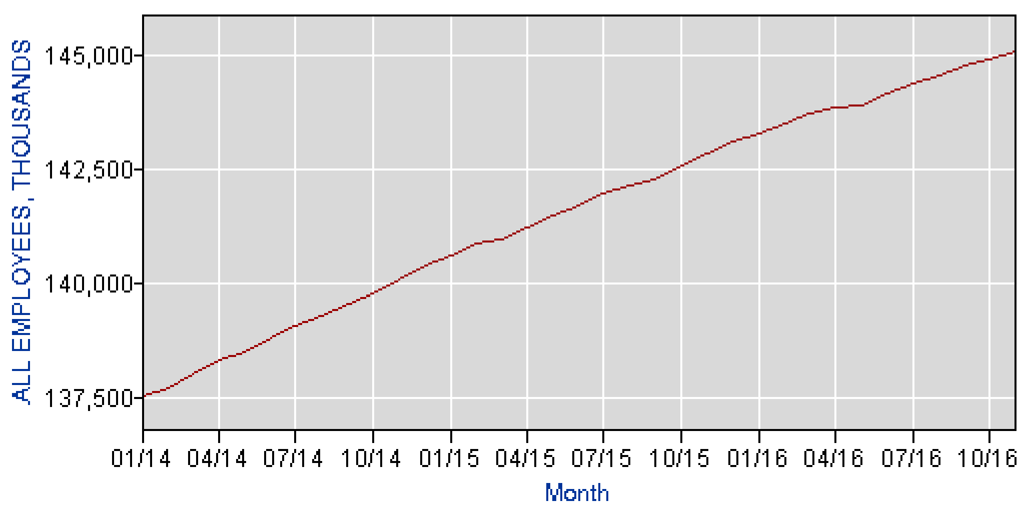
## ECONOMIC INDICATORS: *DOMESTIC*

### US Work Force: 2006-present




### US Work Force: 2014-present




*Source: Bureau of Labor Statistics; Survey Research Center*

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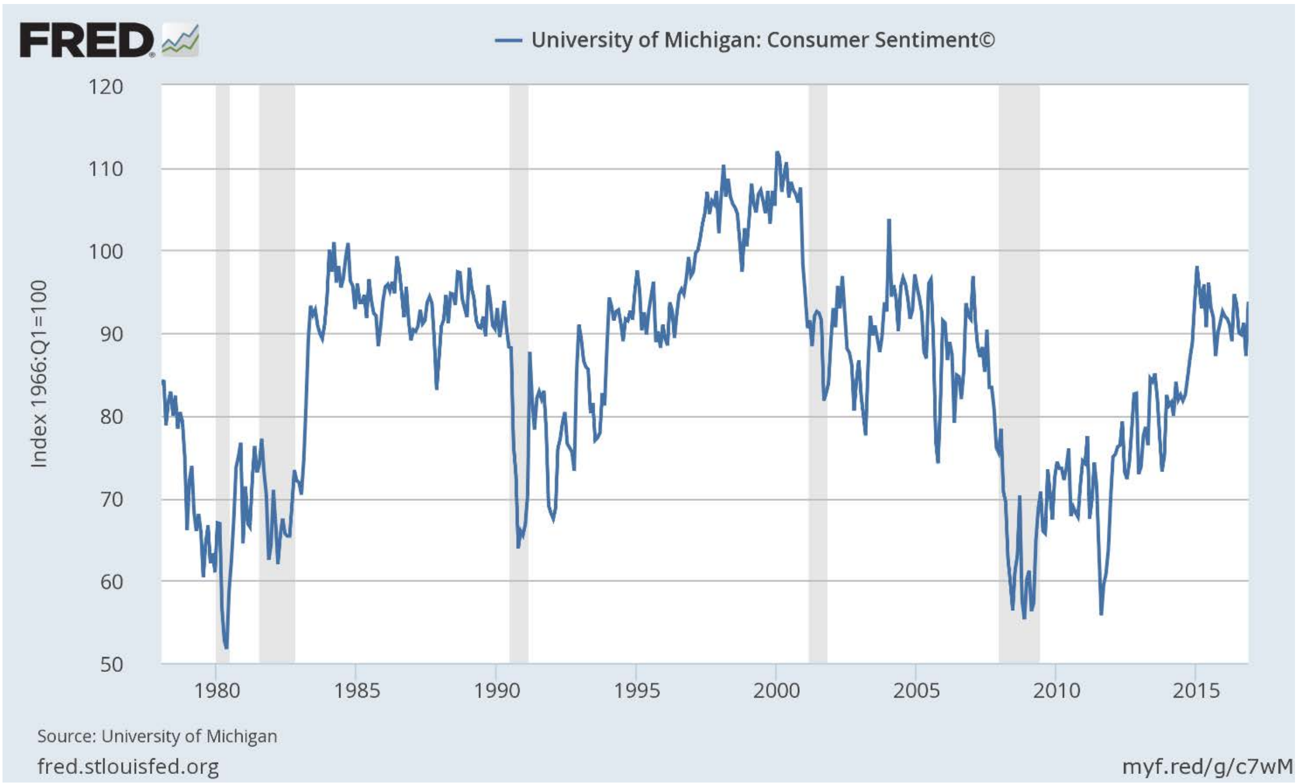
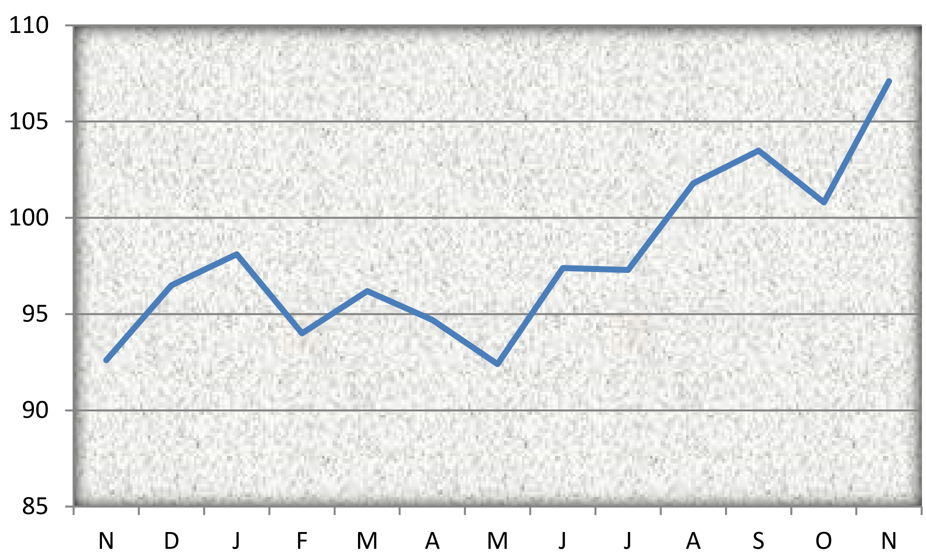
**US Consumer Confidence: 1978-present**




**US Consumer Confidence Last 12 Months**




*Sources: The Conference Board, University of Michigan*

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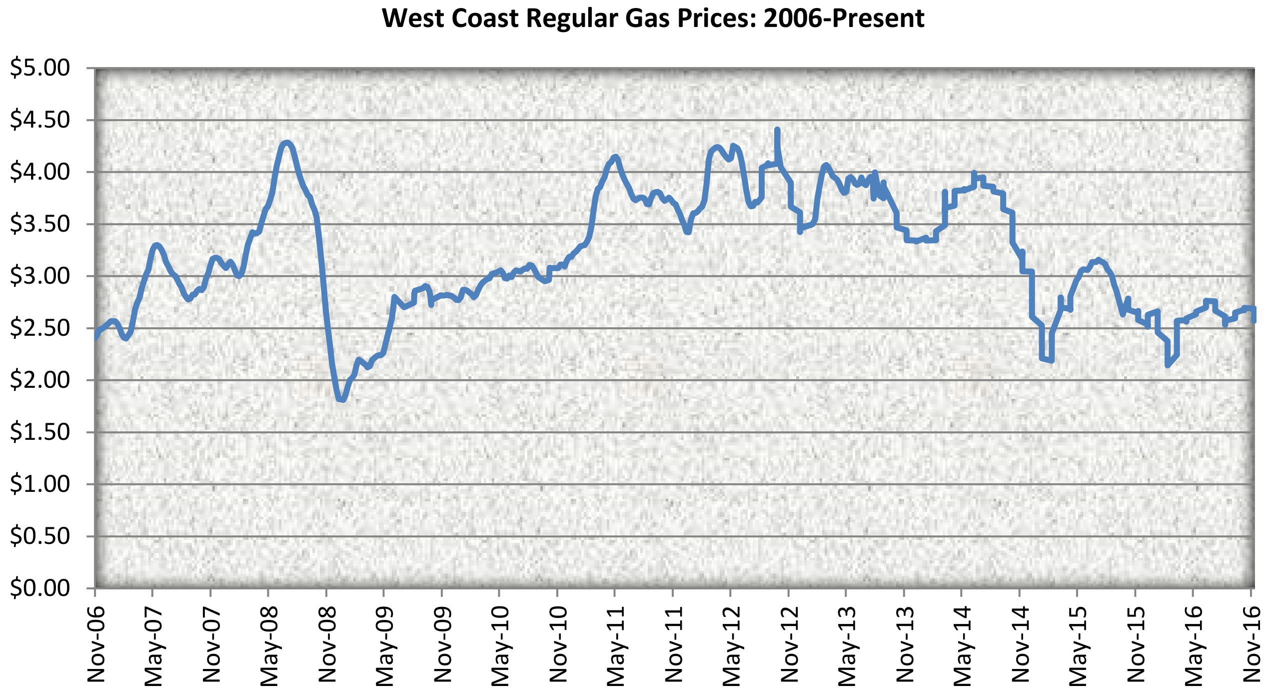


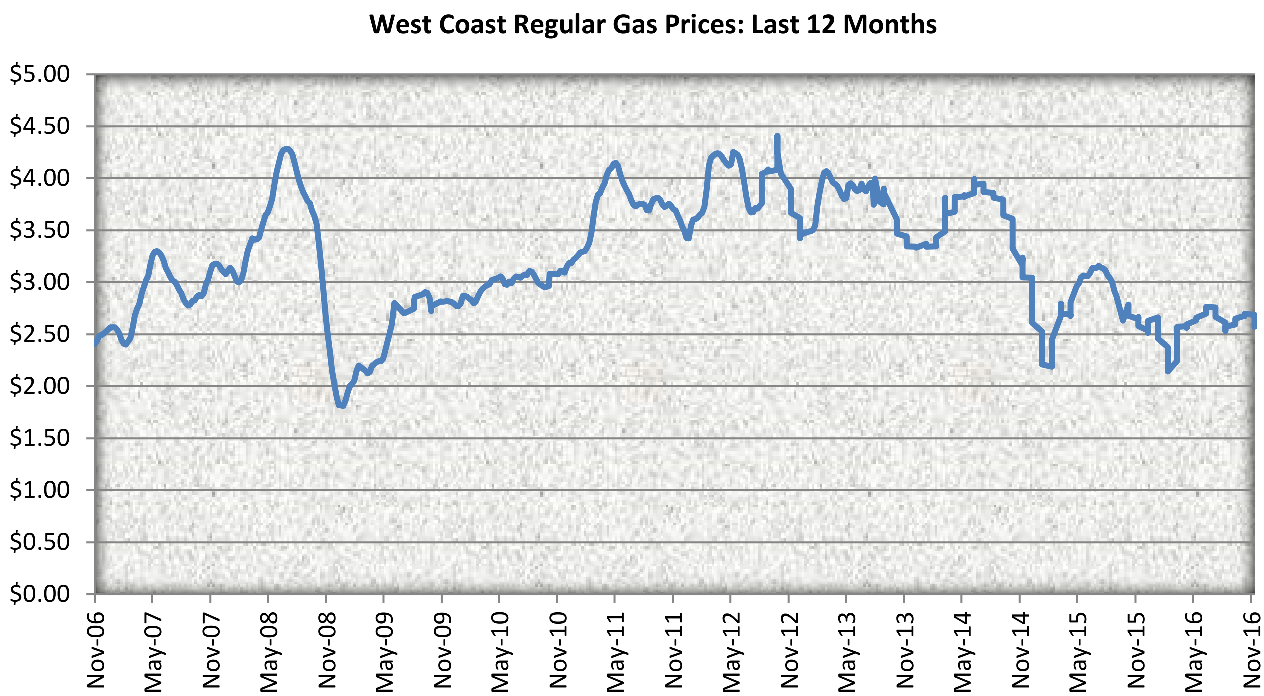


*Source: Energy Information Administration*

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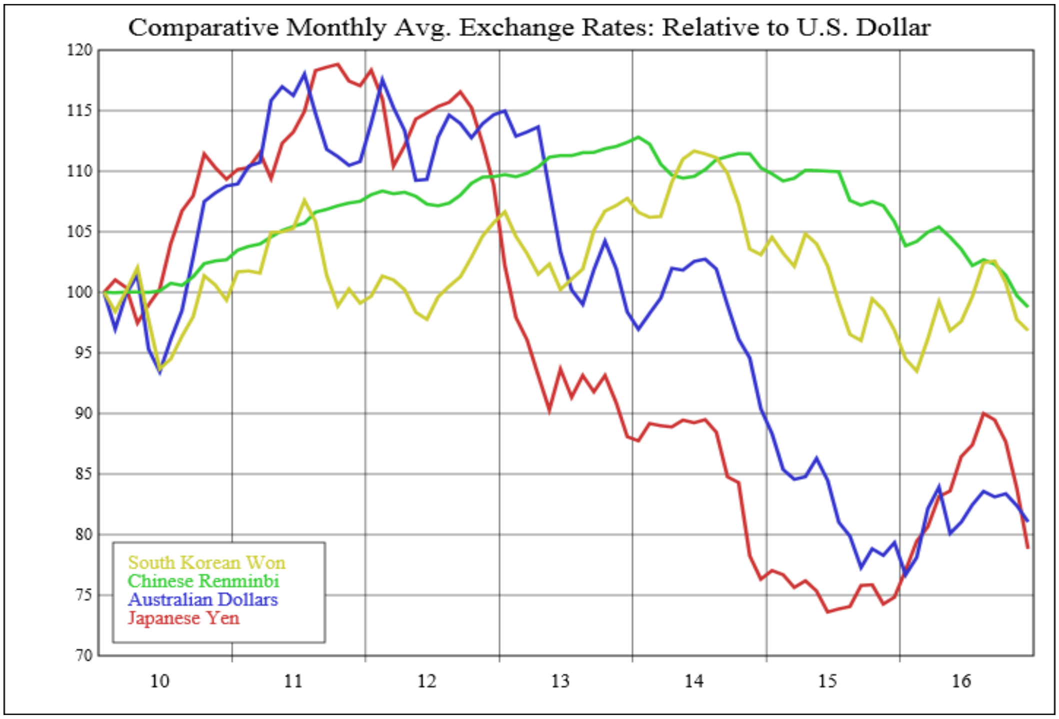
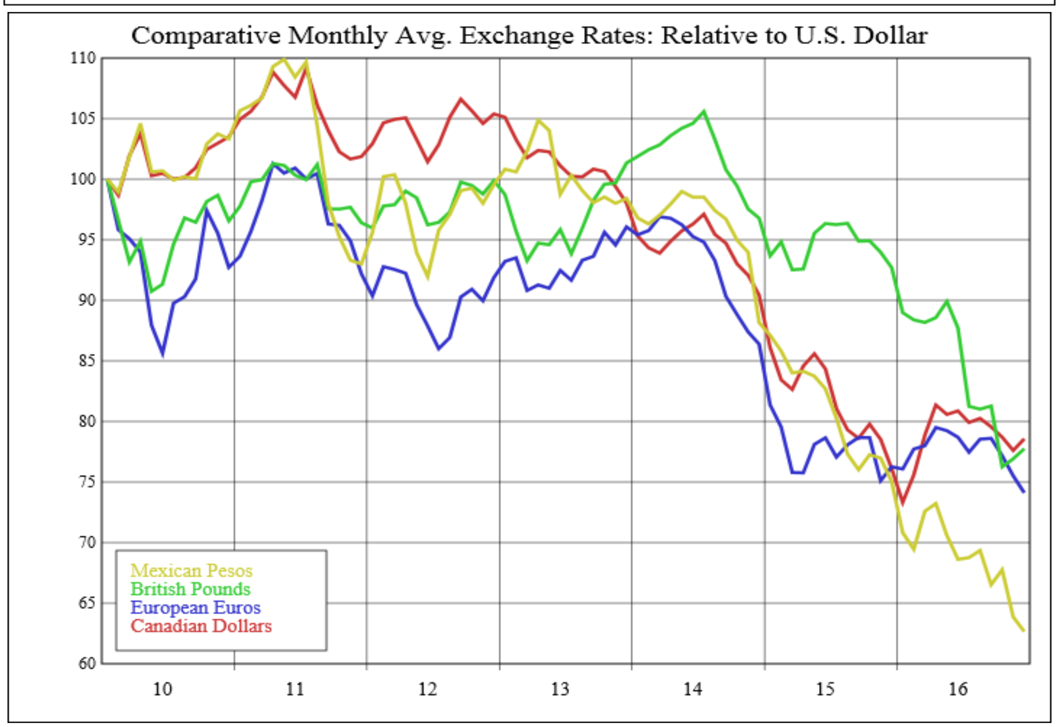
## Exchange Rates

***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.

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## Booking.com Travel Predictions for 2017

Inspired by a wealth of data, traveler endorsements, reviews, preferences and insights as well as industry leading understanding and innovation in e-commerce travel technology, the experts at Booking.com shed light on 8 major travel predictions for 2017.

1. **Instant Gratification 2.0**
… 44% of travelers expect to be able to plan their holiday in a few simple taps on their smart phone and over half (52%) expect their use of travel apps to increase in 2017.
2. **Getting to Business**
Of the 40% of global travelers who journeyed for business this year, 46% think they will travel even more for business in 2017.
3. **Appetite to Discover**
… 45% of respondents plan to be more adventurous in their choice of destination in the coming year, while 47% would like to explore corners of the globe that none of their friends have been to.
4. **Mind, Body and Soul**
Almost half (48%) see going on holiday as a moment to reflect and make better lifestyle choices.
5. **Go Green or Stay Home**
…over a third (36%) of travelers planning to choose more eco- friendly travel options than they did in 2016 and nearly two in five (39%) interested in an eco-tour travel experience.
6. **Simple Pleasures**
… 58% of travelers plan to prioritize spending on experiences rather than material possessions while they are on holiday in 2017.
7. **The Human Touch**
…42% of travelers assert that they wouldn't stay in an accommodation without friendly/helpful staff, while accommodations such as B&Bs and Ryokans look set to continue as the most highly rated by visiting travelers.
8. **Fly Me to the Moon**
… 44% of people see a future where we'll be holidaying in far flung corners of the galaxy or deep under the ocean…"

Read the full Think with Google Report

Luxury Daily

### TRAVEL TRENDS/NEWS

Modern Day Travelers Book Destinations Based On Social Media, Travel Review Sites and In-Person Conversations
–HotelNewsResource

Luxury Travel Industry to Reach $1.2B by 2020: Report
–Luxury Daily

### INTERNATIONAL TRENDS/NEWS

Asia Outbound Travel Boom to Continue in 2017
–HotelNewsResource

China Accounts for Nearly 25% of Global Business Travel Spending
–HotelNewsResource

### CONSUMER TRENDS/NEWS

Will Gastronomy Replace Material Goods as a Status Marker, Conversational Currency?
–LuxuryDaily