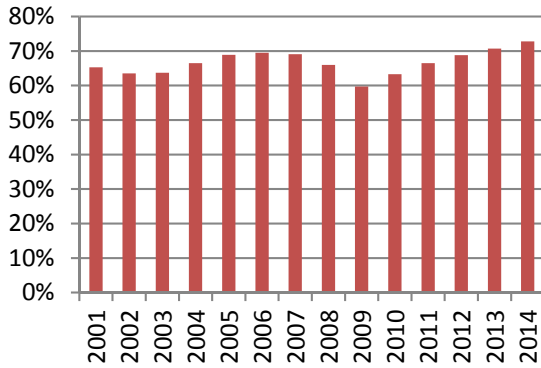


TOURISM INDUSTRY INDICATORS

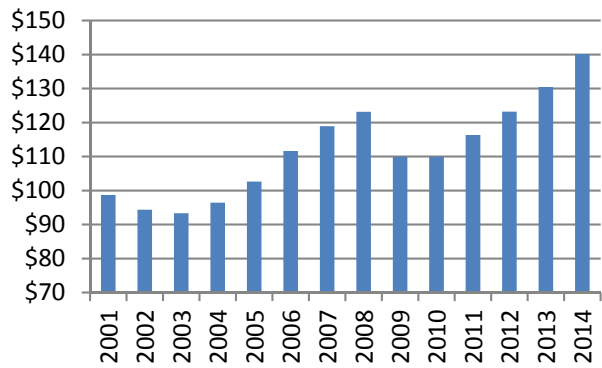
[Link to 'Latest Research' Web Page](#)

Detailed Lodging Tables

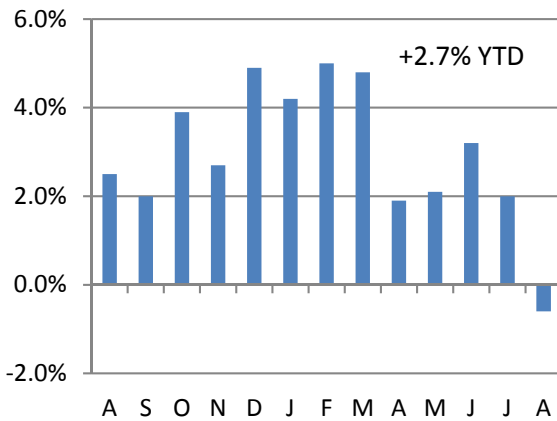
CA Occupancy: 2000-2014



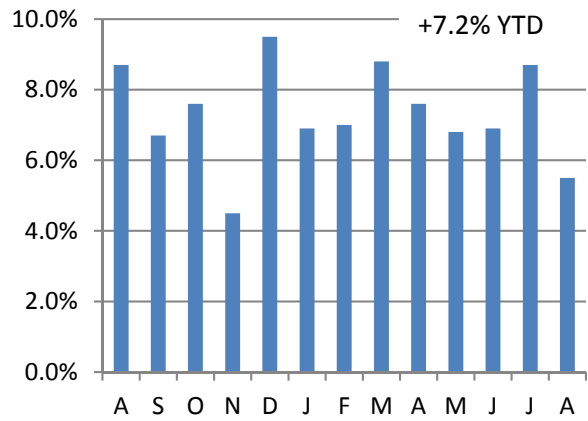
CA ADR: 2000-2014



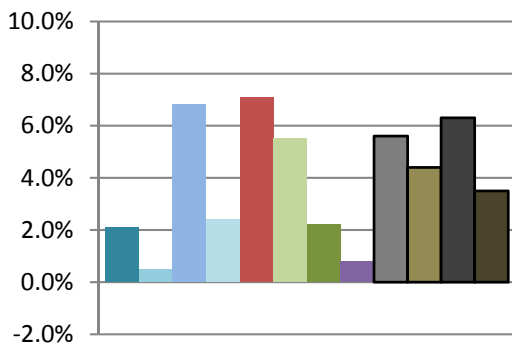
CA Occupancy Yr/Yr Chg: Last 12 Months



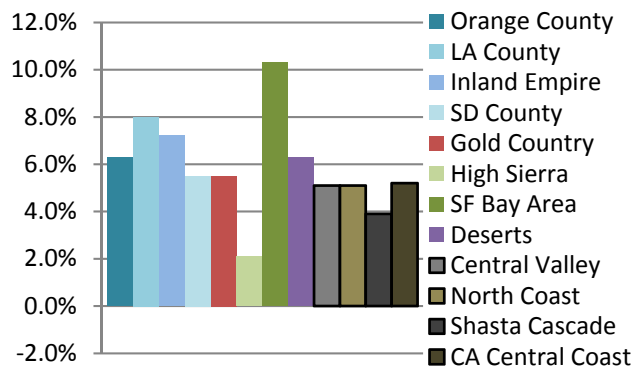
CA ADR Yr/Yr Chg: Last 12 Months



Regional CA Occupancy YTD Chg Aug 2015

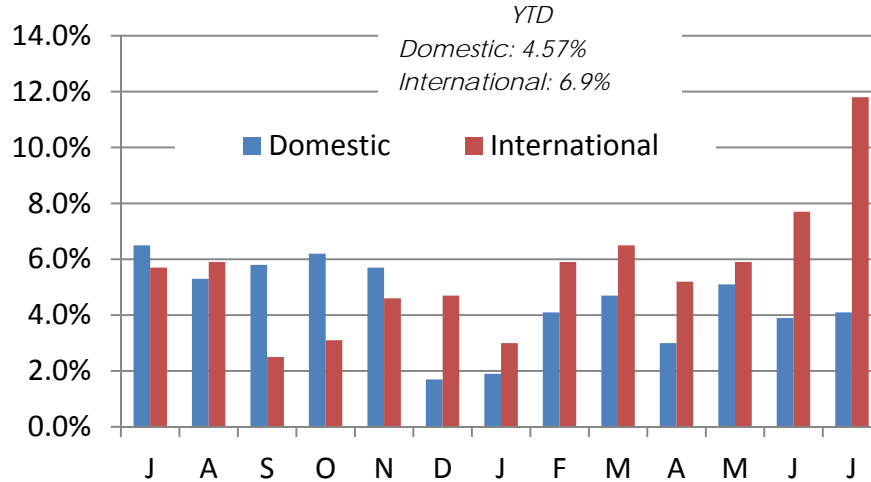


Regional CA ADR YTD Chg: Aug 2015

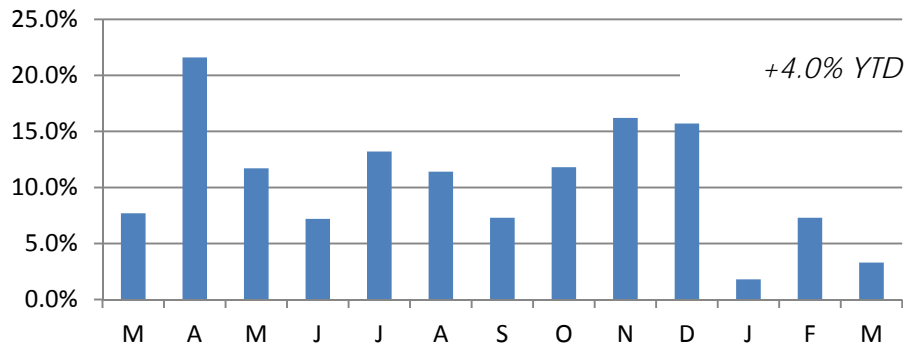


Source: Smith Travel Research

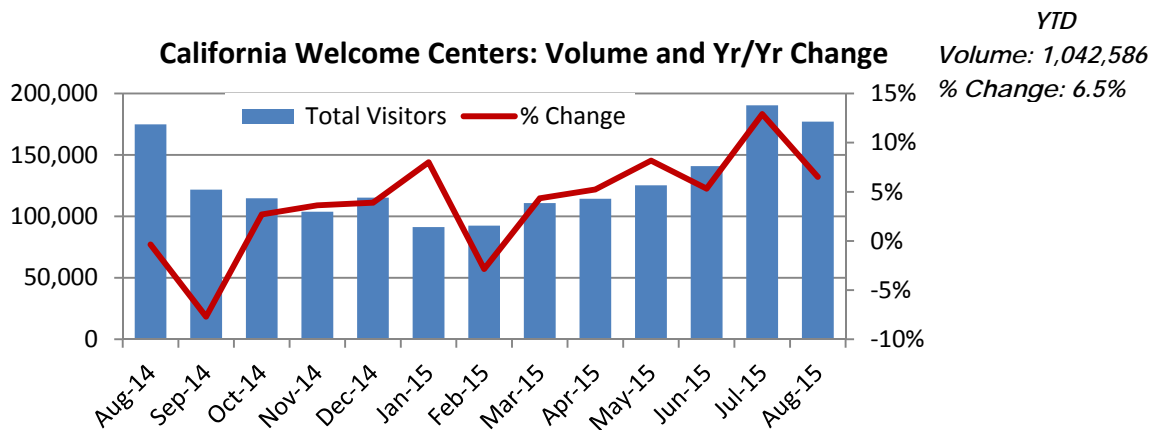
CA Airport Traffic Yr/Yr Chg: Last 12 Months



Overseas Arrivals Yr/Yr Chg: Last 12 Months



California Welcome Centers: Volume and Yr/Yr Change

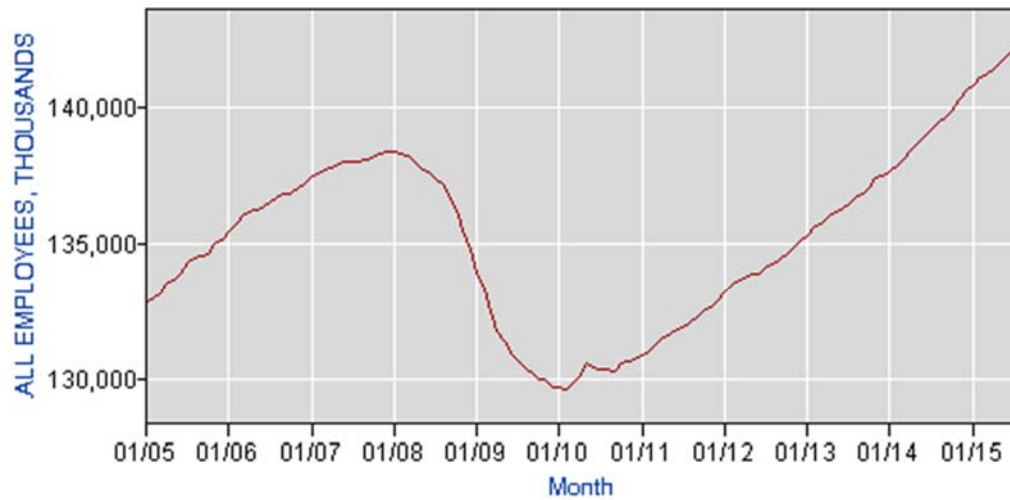


Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year.

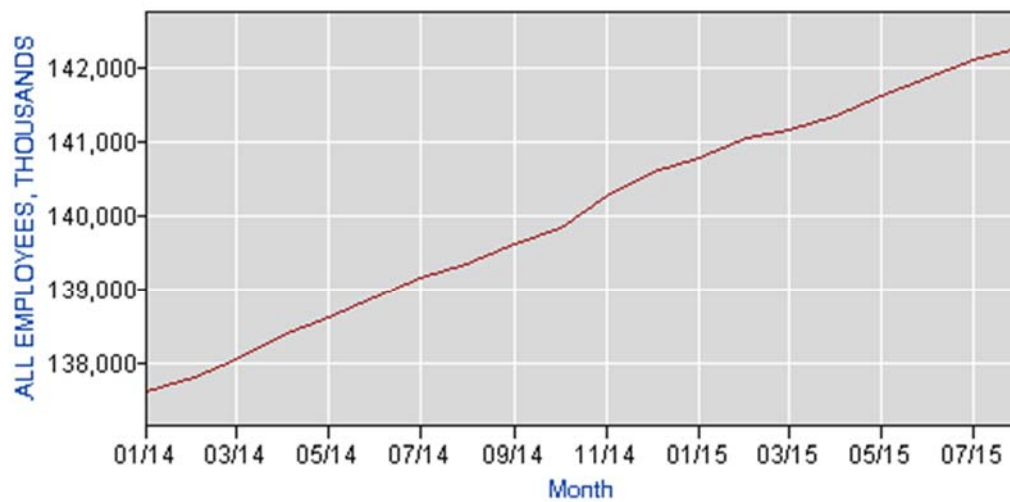
Sources: Individual CA airports; US Dept. of Commerce, California Welcome Centers

ECONOMIC INDICATORS: *DOMESTIC*

US Work Force: 2005-present

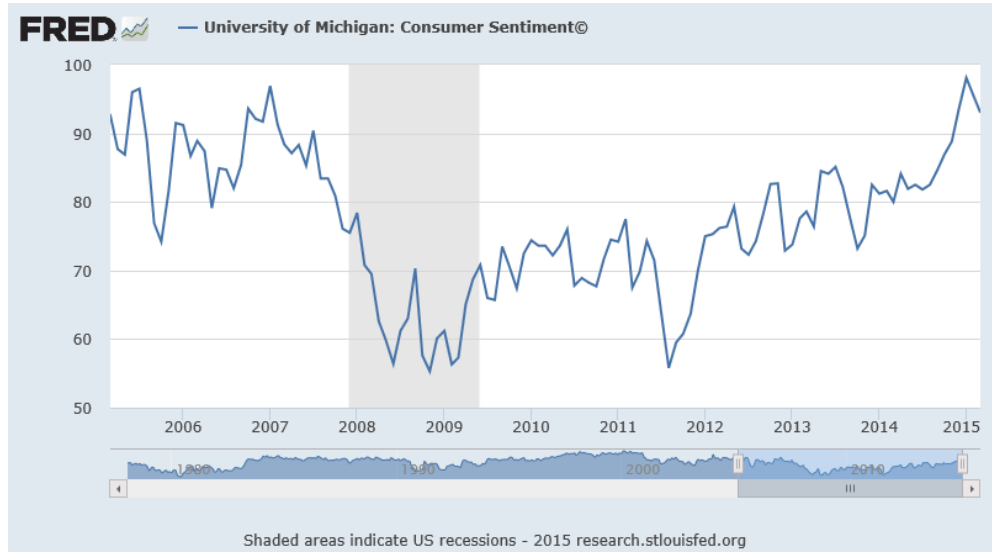


US Work Force: 2014-present

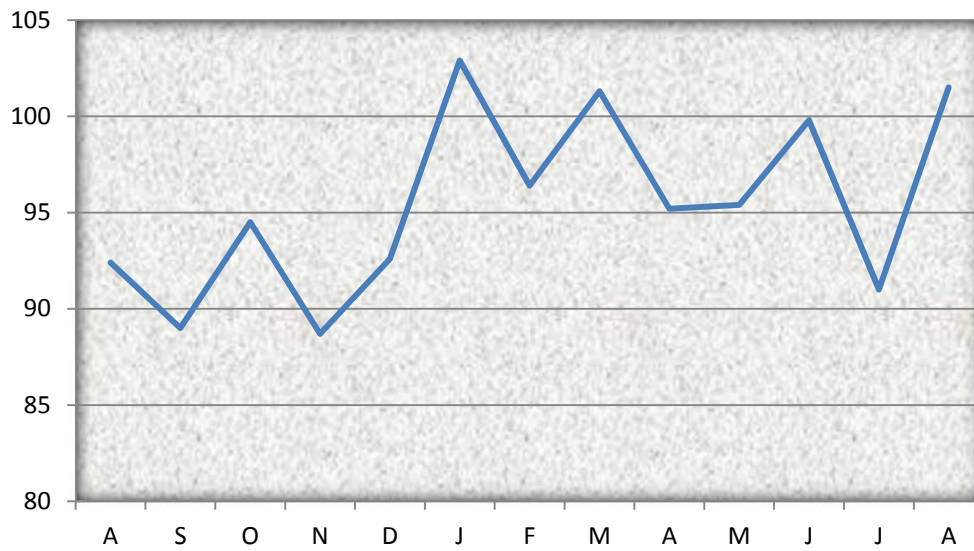


Source: Bureau of Labor Statistics; Survey Research Center

US Consumer Confidence: 1978-present



US Consumer Confidence Last 12 Months

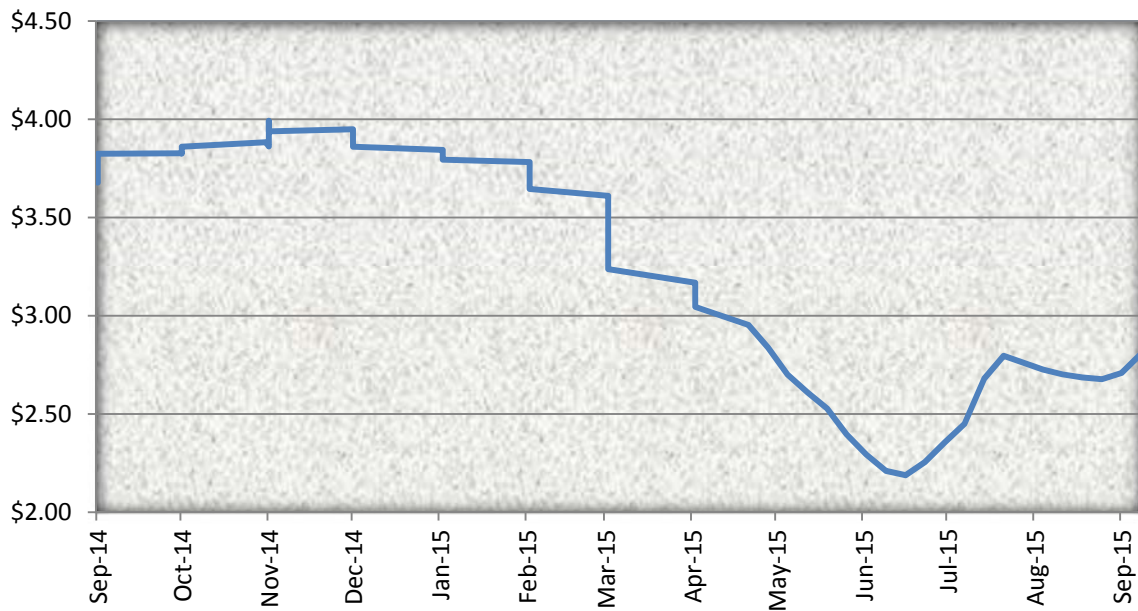


Sources: The Conference Board, University of Michigan

West Coast Regular Gas Prices: 2005-Present

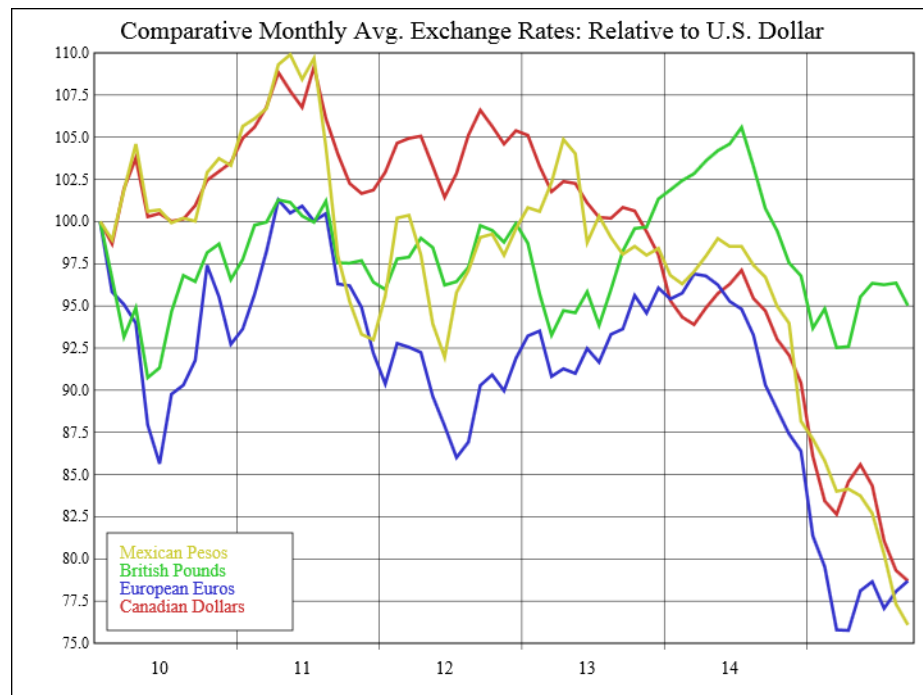
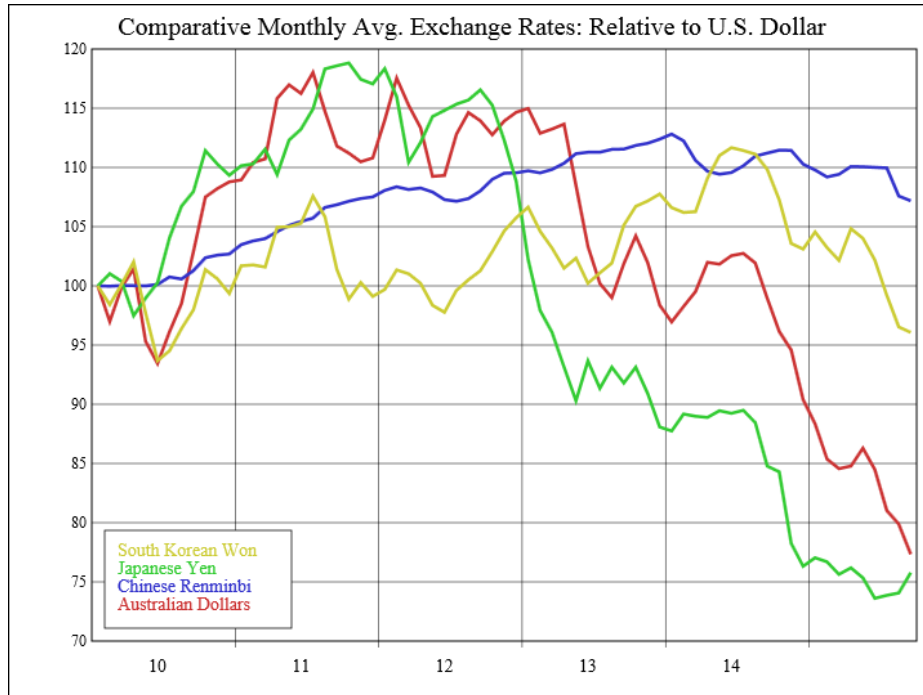


West Coast Regular Gas Prices: Last 12 Months



Source: Energy Information Administration

Exchange Rates
Relative Change Since 2010



Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

FORECAST: INTERNATIONAL (August, 2015)

Annual International Trips to California									
(Annual % change)									
	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total	9.4%	8.8%	3.5%	4.5%	5.1%	1.0%	4.2%	4.4%	4.4%
China	57.1%	22.9%	42.8%	22.1%	21.5%	10.0%	13.5%	12.1%	11.9%
India	19.2%	1.2%	3.0%	26.3%	9.3%	4.0%	6.2%	5.4%	5.0%
Japan	19.3%	4.8%	1.7%	-4.0%	7.4%	0.3%	1.2%	0.6%	0.4%
South Korea	47.7%	-5.4%	-1.7%	0.4%	2.0%	2.5%	4.2%	3.8%	3.6%
Australia	36.6%	11.3%	-5.1%	5.9%	6.4%	0.8%	1.6%	2.6%	2.4%
United Kingdom	3.2%	7.4%	-3.1%	2.6%	5.3%	1.8%	3.0%	2.3%	2.0%
Germany	12.5%	7.4%	-2.4%	5.7%	4.1%	0.6%	3.5%	2.9%	3.2%
France	37.1%	17.9%	-16.1%	4.0%	14.7%	0.4%	2.3%	2.1%	1.8%
Scandanavia	21.9%	14.2%	7.9%	7.0%	11.1%	1.2%	3.4%	3.6%	4.0%
Brazil	32.0%	34.9%	14.2%	12.8%	6.7%	0.1%	2.2%	3.1%	3.0%
Canada	10.0%	8.8%	4.6%	1.6%	3.7%	0.2%	4.4%	4.2%	4.2%
Mexico	1.8%	7.5%	5.7%	3.4%	1.3%	0.1%	3.5%	4.3%	4.2%
Rest of World	9.0%	-4.9%	-3.1%	5.4%	10.2%	0.5%	4.5%	4.0%	3.8%

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.

YOUNGER TRAVELERS AN EMERGING FORCE IN LUXURY SPENDING – Travel Weekly

Travelers who use agents to book their trips continue to be the biggest spenders, according to Travel Weekly's annual Consumer Trends survey. But the latest report and other recent research show a surprising shift in who it is that's doing the luxury spending.

According to this year's Consumer Trends survey, those who used the services of travel agents in the past 12 months spent, on average, \$10,843 a year, compared with \$4,939 among those who didn't use an agent. That is about the same as last year.

The big difference is that spending by travelers over age 55, the group that traditionally leads all ages in average travel spend, declined significantly, from \$8,430 to \$5,840. And the proportion of those age 55 and over who spent less than \$1,000 increased from 6% last year to 23% in this year's survey.

Industry experts said some of the decrease could be attributed to boomers paying off their kids' college tabs, taking more "staycations" and socking away as much of their disposable income as possible just before retirement.

They also noted that other research indicates that Millennials are fast becoming the top connoisseurs of luxury travel.

Steve Cohen, vice president of insights for MMGY, said the marketing firm's 2105 Portrait of American Travelers found that Millennials and Gen-Xers reported they planned to spend 10% more on travel this year, compared with boomers and matures, who planned to spend 1% more.

"Millennials continue to lead the resurgence in travel," Cohen said. "They're the ones who would rather spend their money on experiences than stuff."

[FULL ARTICLE](#)

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- [CHINESE CONSUMERS WILL DOUBLE OVERSEAS SPENDING BY 2020](#)
– Luxury Daily
- [CHINESE OUTBOUND TOURISTS EXCEED 100 MILLION FOR THE 1ST TIME](#)
– Hospitality Trends
- [BRAZIL'S LUXURY MARKET LOSES GROUND](#)
– CPP Luxury

CONSUMER TRENDS/NEWS

- [FUTURE OF LUXURY MARKETING IS IN HENRYS](#)
– Luxury Daily
- [HOW DO MILLENIALS & OTHER GENERATIONS SEE THEMSELVES](#)
– MarketingCharts

TRAVEL TRENDS/NEWS

- [FOUR TRENDS DRIVING THE LUXURY HOTEL MARKET](#)
– Wealth-X
- [TRIP LENGTHS: THE YEAR OF THE QUICK GETAWAY](#)
– Travel Weekly
- [LUXURY TRAVEL ADAPTS TO NEEDS, EXPECTATIONS OF GENS X AND Y](#)
– Luxury Daily