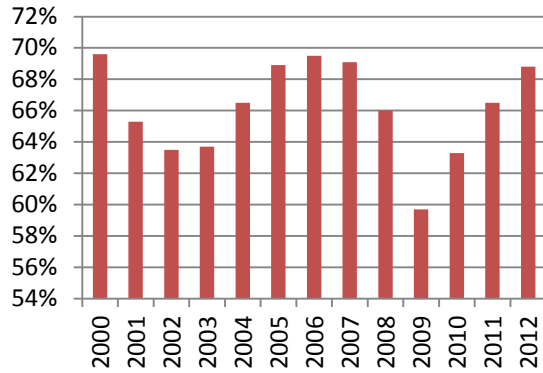


TOURISM INDUSTRY INDICATORS

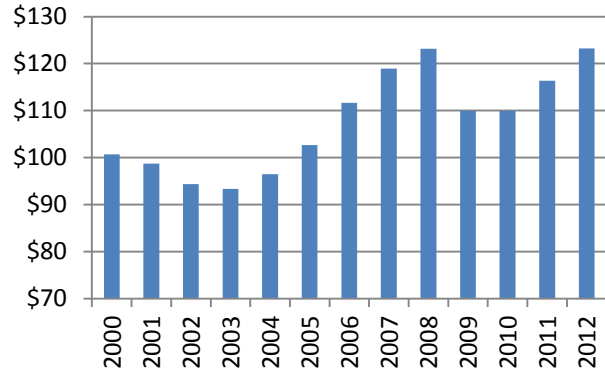
Detailed Lodging Tables

[Link to Data Charts](#)

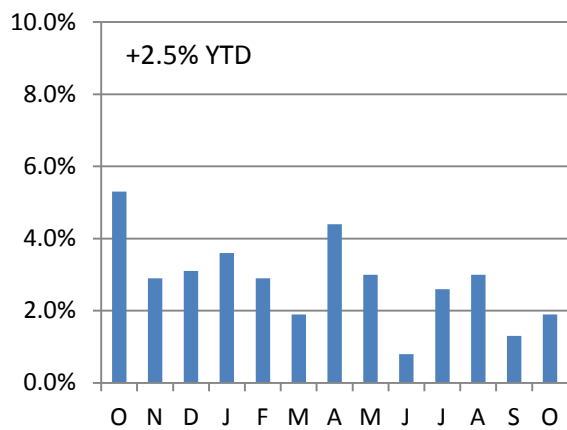
CA Occupancy: 2000-2012



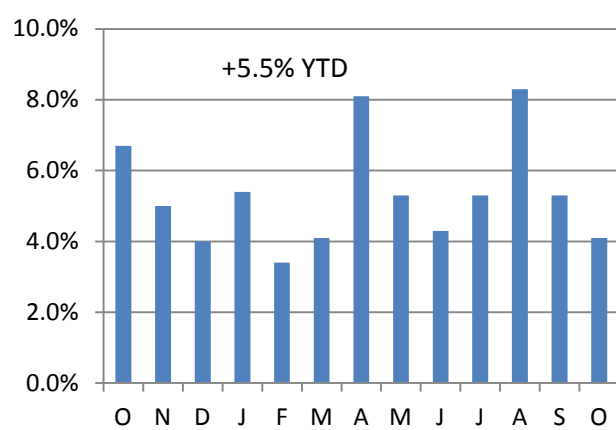
CA ADR: 2000-2012



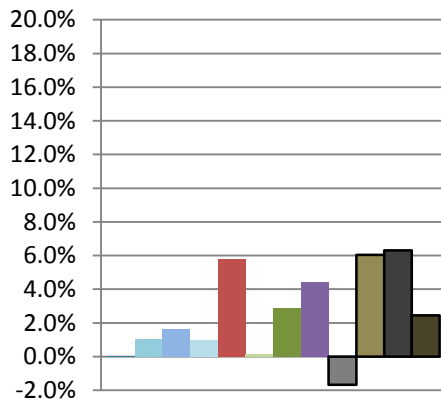
CA Occupancy Yr/Yr Chg: Last 12 Months



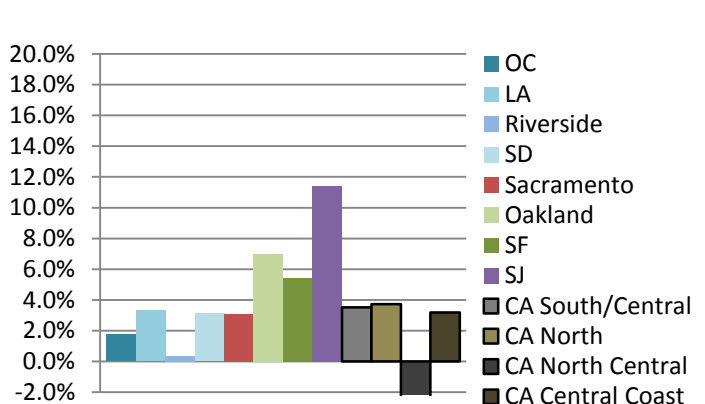
CA ADR Yr/Yr Chg: Last 12 Month



Regional CA Occupancy Yr/Yr Chg: October 2013



Regional CA ADR Yr/Yr Chg: October 2013

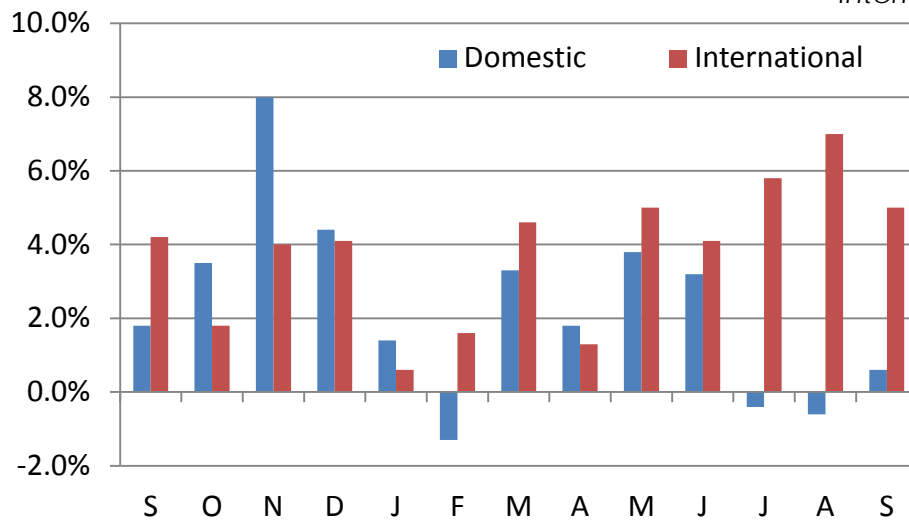


Source: Smith Travel Research

CA Airport Traffic Yr/Yr Chg: Last 12 Months

[Link to Data Charts](#)

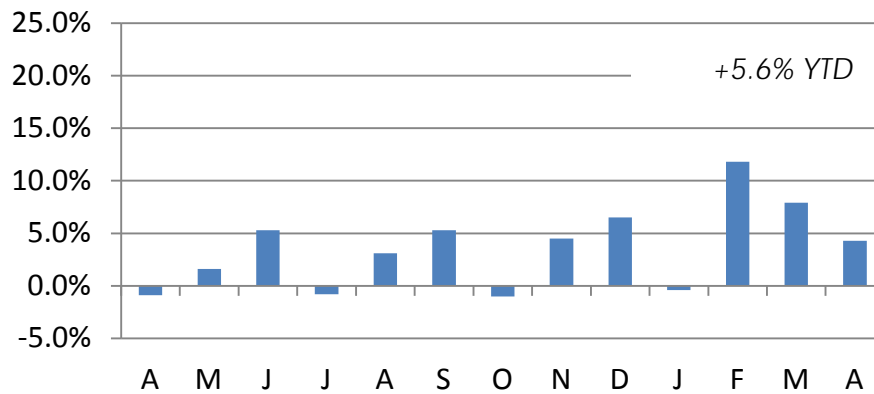
YTD
 Domestic: +1.3%
 International: +4.1%



Overseas Arrivals Yr/Yr Chg: Last 12 Months

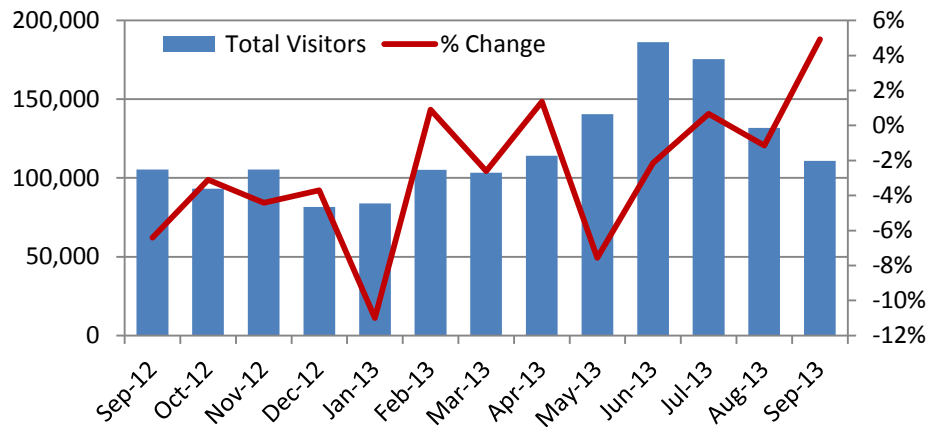
[Link to Data Charts](#)

+5.6% YTD



California Welcome Centers: Volume and Yr/Yr Change

YTD
 Volume: 1,232,874
 % 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, Google Analytics, California Welcome Centers

Travel Trade Barometer Projections

Canada Travel Trade Barometer 2013 S1												
Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 4-9%	82%	0%	9%	Higher	78%	11%	11%	Higher	78%	11%	11%
California	Up 10-15%	82%	0%	9%	Higher	78%	11%	11%	Higher	78%	11%	11%

United Kingdom Travel Trade Barometer 2013 S1																
Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)				4th Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 1-3%	58%	17%	25%	Higher	80%	0%	20%	Higher	70%	20%	10%	AS	60%	10%	20%
California	Up 1-3%	58%	0%	25%	Higher	70%	10%	10%	Higher	50%	20%	10%	Higher	40%	20%	10%

Japan Travel Trade Barometer 2012 S3 R12																
Change in Bookings	2nd Qtr 2012				3rd Qtr 2012				4th Qtr 2012 (P)				1st Qtr 2013 (P)			
	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓
U.S. Mainland	Up 10-15%	100%	0%	0%	Up 10-15%	100%	0%	0%	Higher	60%	40%	0%	Higher	40%	60%	0%
California	Up 1-3%	80%	0%	20%	Up 1-3%	80%	0%	20%	Higher	60%	40%	0%	AS	40%	40%	20%

Germany Travel Trade Barometer 2013 S1												
Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	NC	57%	0%	43%	Higher	57%	14%	29%	Higher	57%	14%	29%
California	Up 1-3%	57%	0%	29%	Higher	57%	14%	29%	Higher	57%	14%	29%

Mexico Travel Trade Barometer 2012 S4																
Change in Bookings	4th Qtr 2012				Year-End 2012				1st Qtr 2013 (P)				2nd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 4-9%	100%	0%	0%	Up 4-9%	100%	0%	0%	Higher	83%	17%	0%	Higher	83%	17%	0%
California	Up 1-3%	67%	17%	17%	Up 1-3%	83%	17%	0%	Higher	67%	33%	0%	Higher	83%	17%	0%

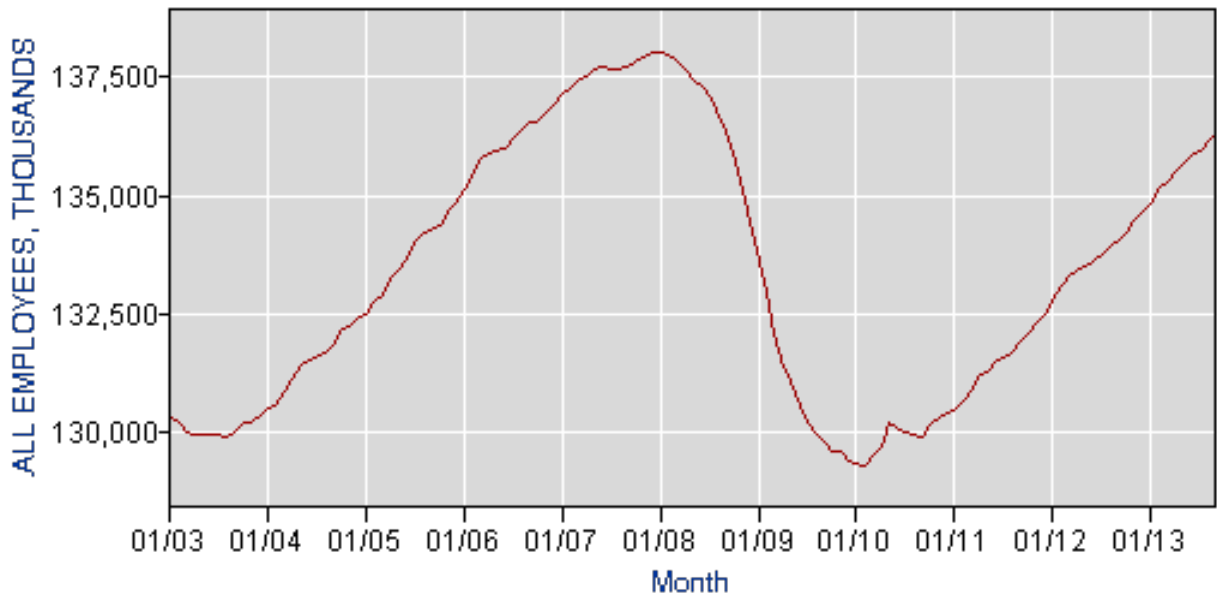
China Travel Trade Barometer 2012

Change in Bookings	1 st Qtr 2013				2 nd Qtr 2013 (P)				3 rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S. Mainland only	Increased 10% to 15%	82%	5%	14%	Higher	86%	14%	0%	Higher	86%	9%	5%
California	Increased 4% to 9%	82%	9%	9%	Higher	86%	14%	0%	Higher	86%	9%	5%

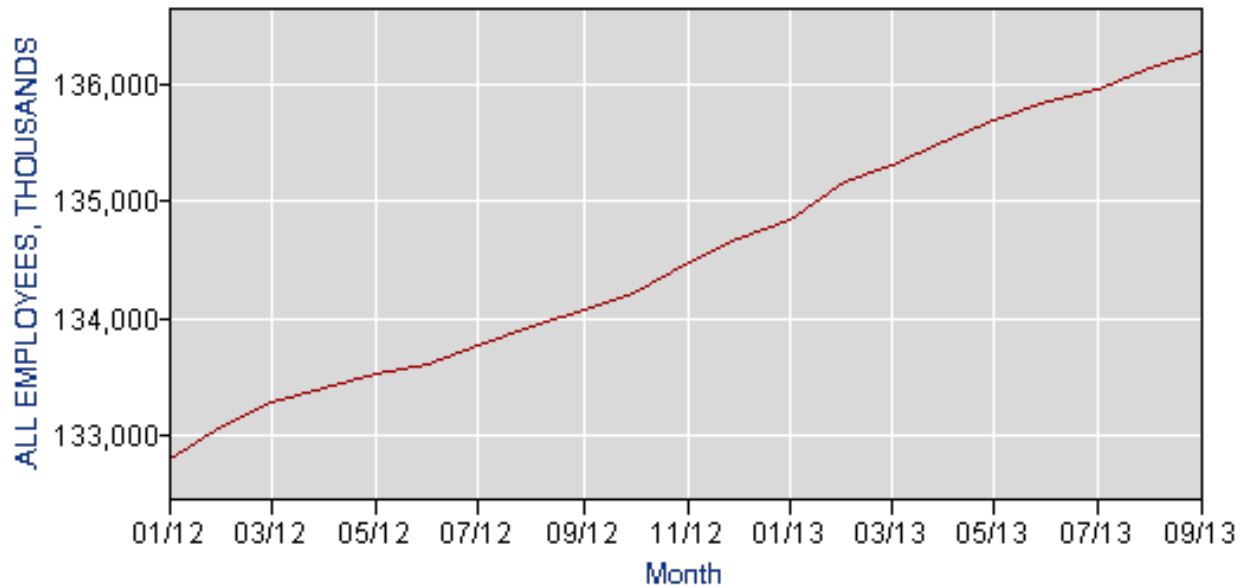
Note: 1. Respondents include members of wholesale and retail travel companies, airlines, tour operators, travel agents and publishers and marketing and promotion companies. 2. AS refers to 'About the Same', NC refers to 'No Change' and MH refers to 'Much Higher'. Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: DOMESTIC

US Work Force: 2003-present

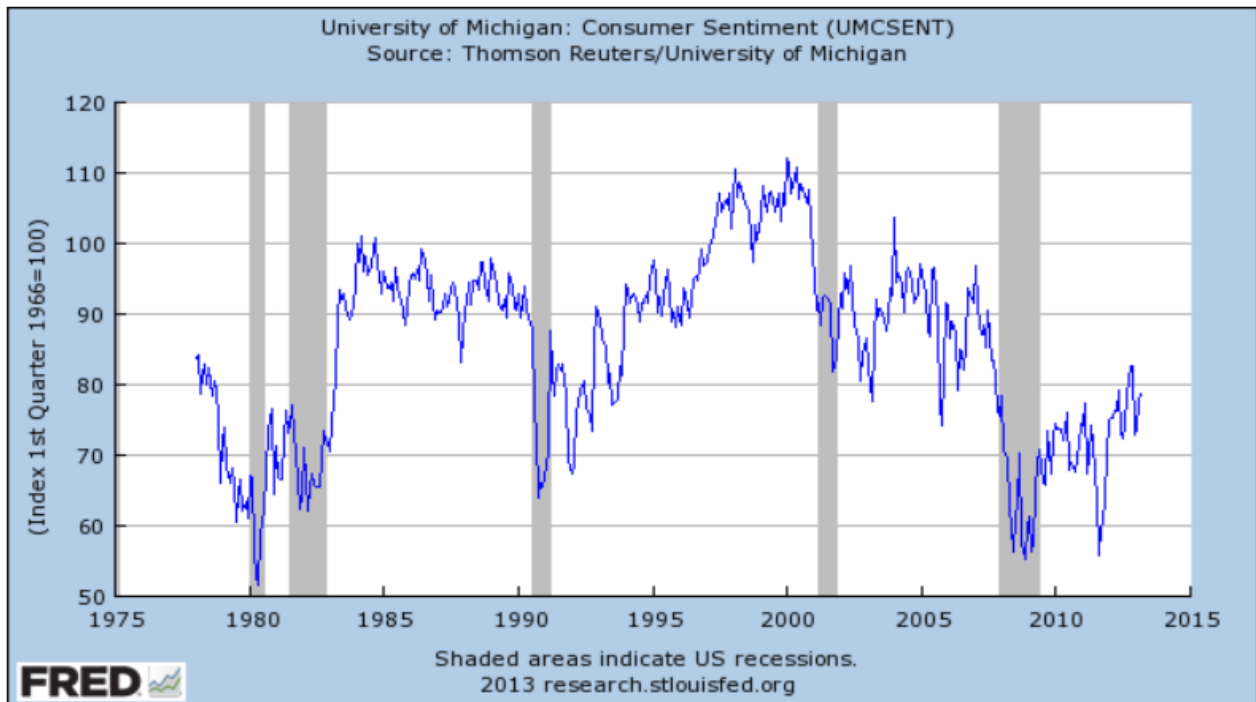


US Work Force: 2012-present

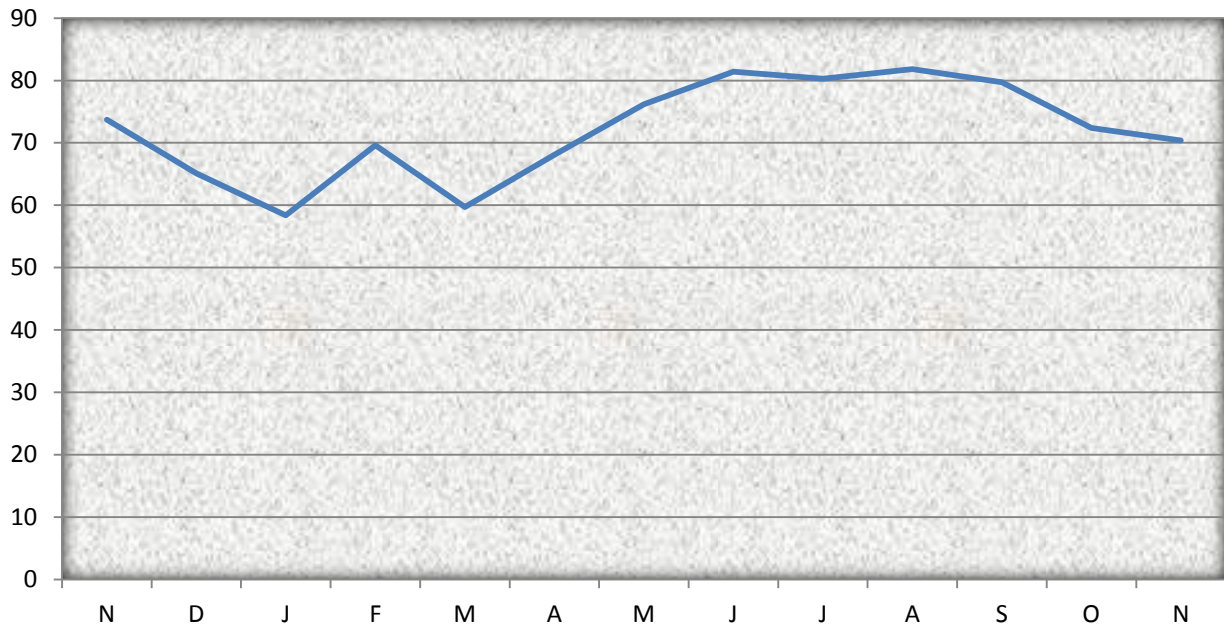


Source: Bureau of Labor Statistics; Survey Research Center

US Consumer Confidence: 1978-present

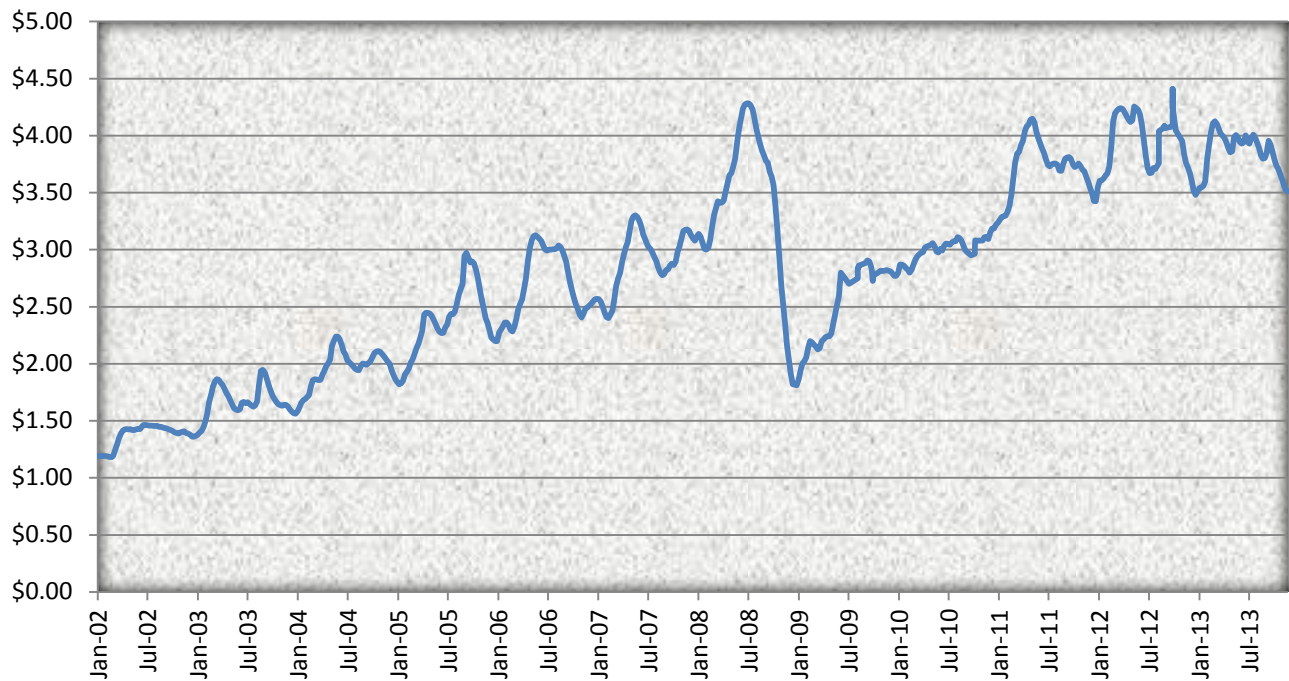


US Consumer Confidence Last 12 Months

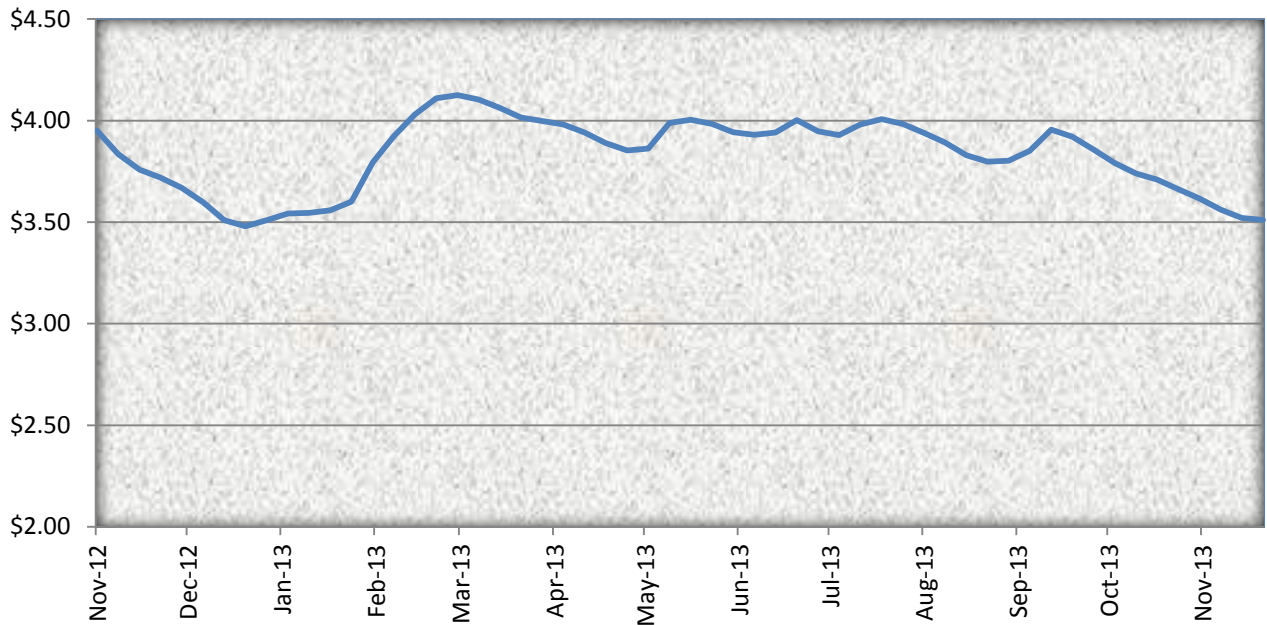


Sources: The Conference Board, University of Michigan

West Coast Gas Prices: 2002-Present

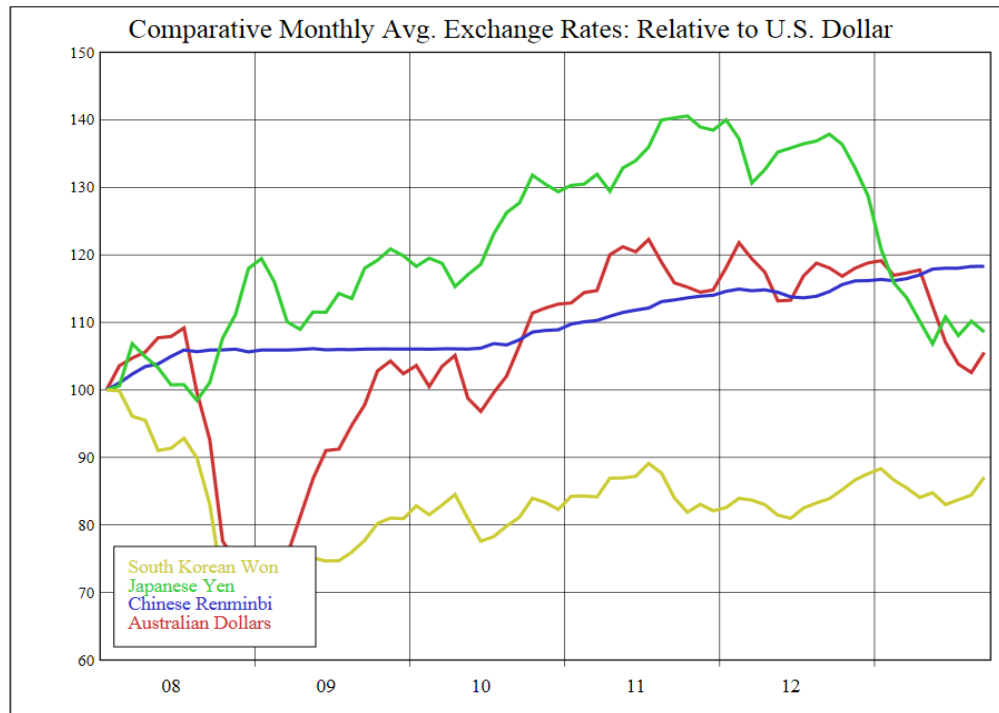


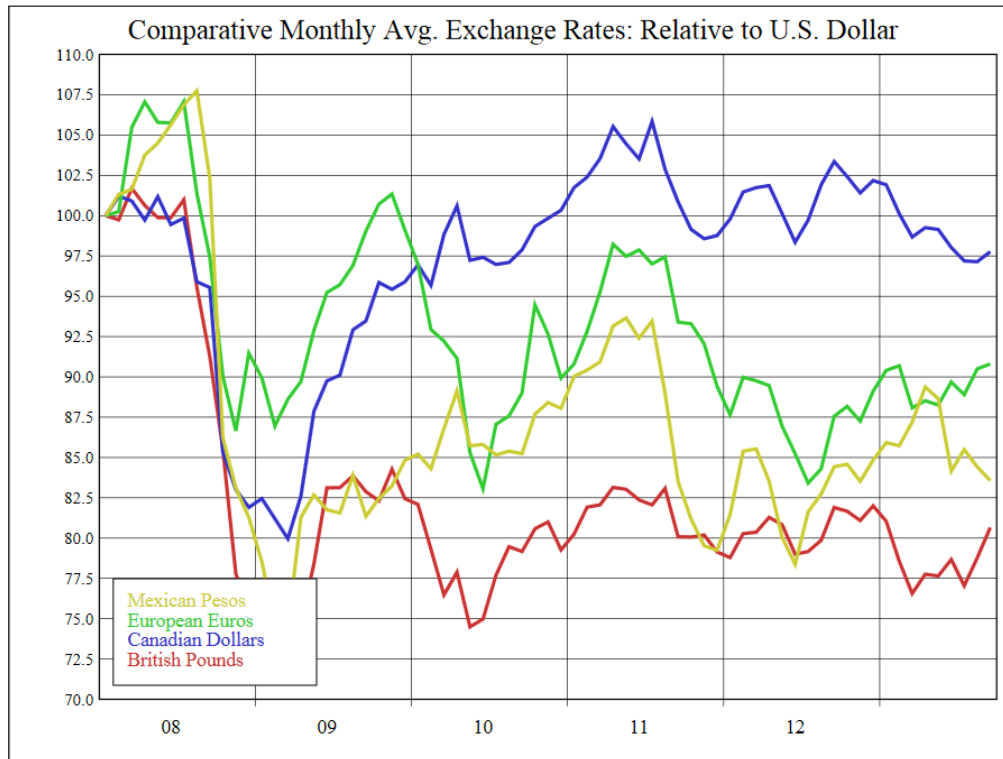
West Coast Gas Prices: Last 12 Months



Source: Energy Information Administration

Exchange Rates
Relative Change Since 2008





Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

International Non-Stop Flights and Seats

Monthly Totals, California's Top Markets

NS Air Service November 2013	Australia	Brazil	China	France	Germany	Japan	S. Korea	UK
NS Flights								
LAX	235	13	166	56	48	252	150	190
SFO	30	0	120	56	86	164	111	118
SAN	0	0	0	0	0	30	0	29
Total CA	265	13	286	112	134	476	261	337
NS Seats								
LAX	89,405	3,783	53,600	22,459	19,193	67,503	51,811	61,033
SFO	11,220	0	40,232	11,764	28,940	44,605	33,088	38,942
SAN	0	0	0	0	0	5,580	0	8,613
Total CA	100,625	3,783	93,832	34,223	48,133	122,428	84,899	108,588
Seats % Chg								
LAX	4%	0%	2%	4%	-4%	-20%	2%	1%
SFO	0%	na	45%	62%	-17%	12%	-9%	-8%
SAN	na	na	na	na	na	na	na	19%
Total CA	4%	0%	17%	19%	-12%	-1%	-3%	-1%

	Canada			Mexico		
	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change
FAT	0	0	na	43	7,300	21%
LAX	619	79,312	13%	974	140,859	21%
OAK	0	0	na	48	6,942	24%
ONT	0	0	na	25	4,000	61%
PSP	122	19,682	12%	0	0	na
SAN	47	6,002	2%	105	15,635	27%
SFO	502	49,123	5%	302	42,879	-2%
SJC	0	0	na	81	13,458	67%
SMF	0	0	na	35	5,328	36%
SNA	30	4,080	0%	120	17,220	na
Total CA	1,320	158,199	9%	1,733	253,621	17%

Note: Seats and flights for total California may be greater than sum of rows because of international air service into other California airports. Source: OAG

FORECAST: INTERNATIONAL

Annual International Leisure Trips to California							
(Annual % change)							
	2010	2011	2012	2013	2014	2015	2016
Total	10.6%	9.0%	3.3%	4.2%	4.9%	5.6%	5.9%
China	49.1%	34.8%	36.8%	16.7%	18.6%	17.8%	16.0%
India	17.2%	8.7%	8.1%	8.7%	9.5%	10.0%	11.2%
Japan	19.3%	5.4%	7.0%	4.3%	5.1%	5.8%	6.0%
South Korea	40.8%	-0.5%	1.3%	3.8%	4.7%	6.1%	6.8%
Australia	33.2%	-2.2%	-0.8%	2.8%	3.9%	4.9%	5.5%
United Kingdom	3.0%	-3.0%	-1.9%	0.4%	1.7%	2.0%	2.6%
Germany	9.3%	3.1%	1.8%	4.1%	4.3%	4.5%	4.3%
France	38.8%	17.0%	-14.1%	0.3%	1.3%	2.0%	2.4%
Scandinavia	21.3%	4.5%	2.2%	0.9%	1.4%	1.8%	2.3%
South America	20.2%	19.9%	17.7%	8.1%	9.4%	11.1%	12.4%
Canada	10.0%	6.4%	3.6%	4.0%	4.1%	4.3%	4.2%
Mexico	5.3%	8.5%	3.5%	4.1%	4.7%	5.3%	5.5%
Rest of World	11.8%	-4.9%	2.5%	4.3%	4.6%	5.6%	6.3%

Source: TourismEconomics. Historical sources: QC 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.

TRAVEL/TOURISM NEWS & TRENDS

Skyscanner Poll Reveals That Men are Happy to Let Women Take Charge

Three quarters of women said they do most of the holiday research.

Consumer Trends/News

- [For Growing Ranks of the Wealthy, Travel Is a Priority - "Leisure is an unwavering, trend-proof, recession-resilient status symbol. What shifts](#)

