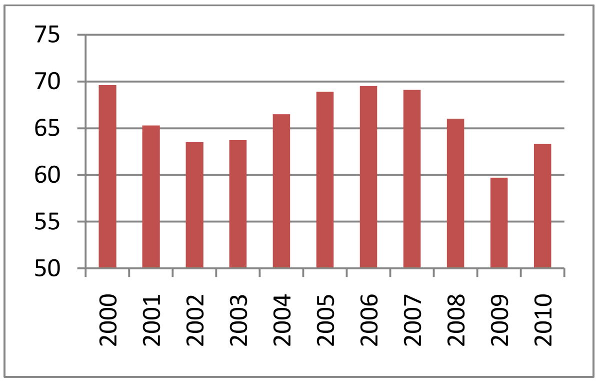
February 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

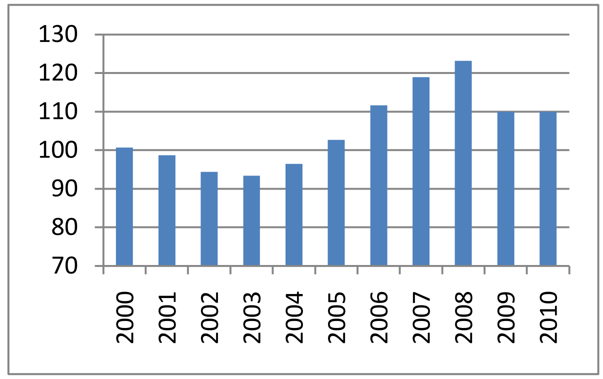
Detailed Lodging Tables

Link to Data Charts

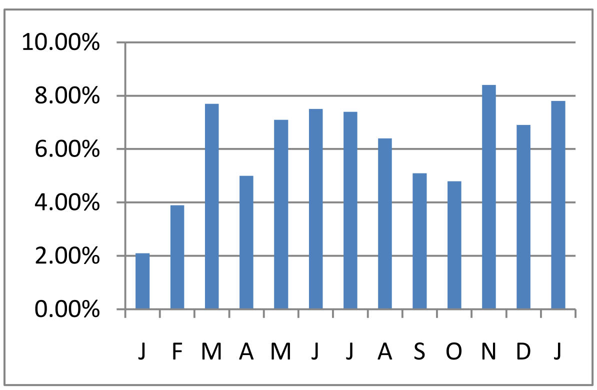
CA Occupancy: 2000-2010



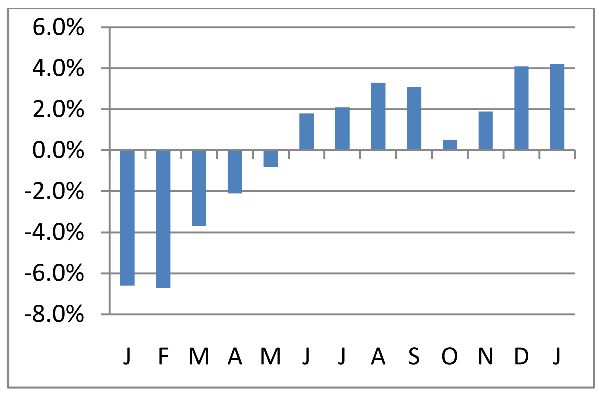
CA ADR: 2000-2010



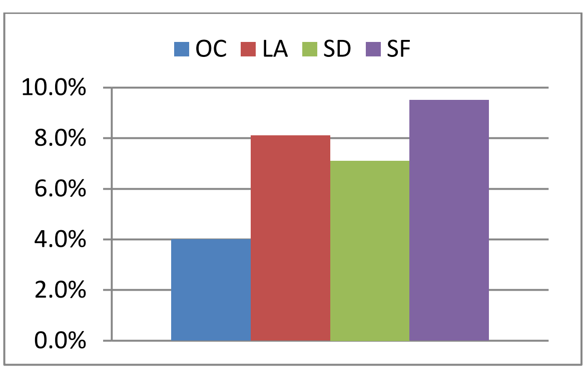
CA Occupancy Yr/Yr Chg: Last 12 Months



CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: Feb 2011



Preliminary CA ADR Yr/Yr Chg: Feb 2011

Source: Smith Travel Research

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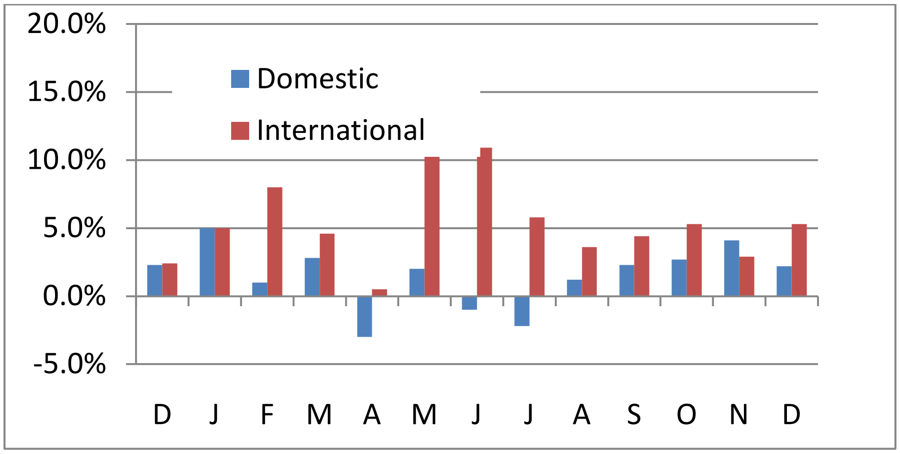
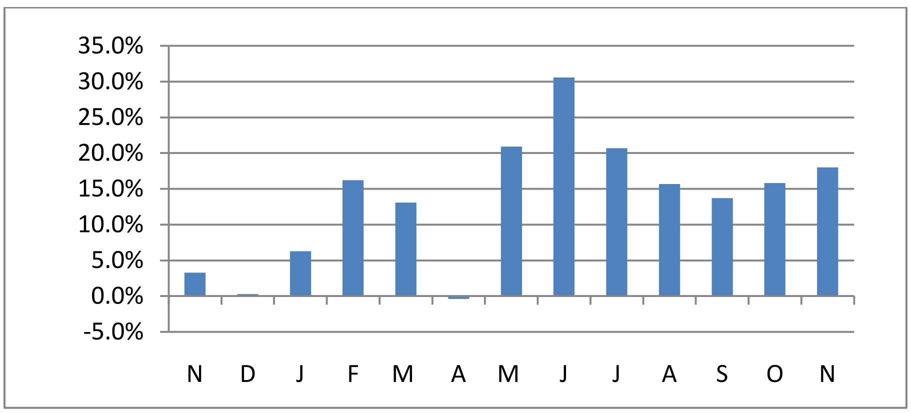
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

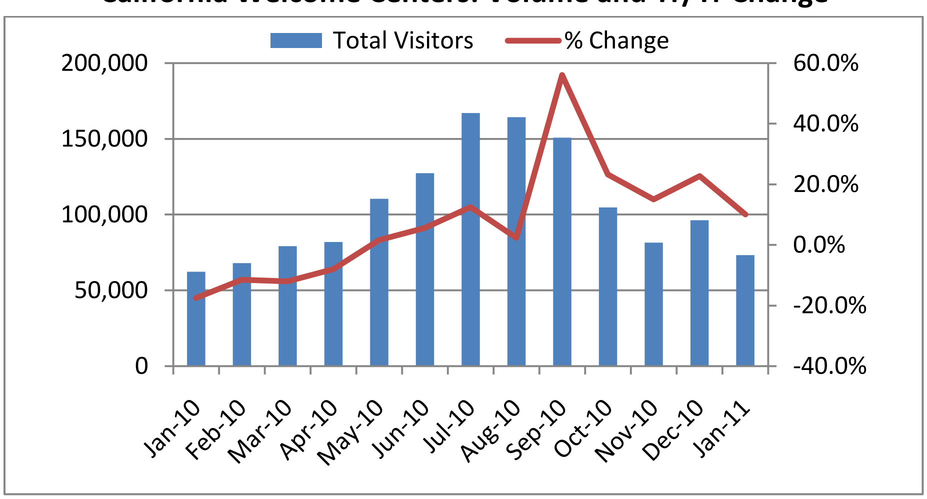


Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



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, Google Analytics, California Welcome Centers

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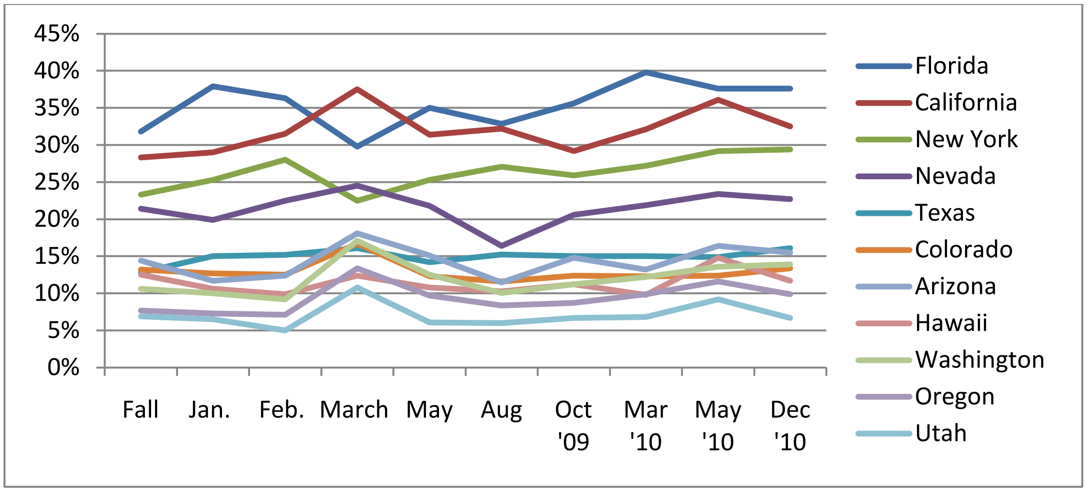
US Travelers: % Who Intend to Travel to Key States in Next 12 Months



US Travelers: % Who Intend to Travel to California in Next 12 Months, by Geography

Projected Travel	Spring '08	Fall '08	Jan '09	Feb '09	Mar '09	May '09	Aug '09	Oct '09	Mar '10	May '10	Dec'10
Primary	50%	45%	48%	49%	50%	52%	47%	47%	55%	51%	49%
National	18%	20%	20%	23%	29%	21%	24%	21%	21%	28%	24%
In-State	79%	71%	74%	75%	82%	78%	77%	72%	90%	81%	75%

Note: Primary refers to residents of CA's 6 primary markets (AZ, NV, WA, OR, CO, UT). National refers to non-CA, non-primary market residents, and In-State refers to CA residents.

Projected Changes in US Traveler Behavior in Next 12 Months

Activity	Jan '09	Feb '09	Mar '09	May '09	Aug '09	Sept '09	Oct '09	Mar '10	May '10	Dec'10
Will take fewer trips	25%	29%	21%	22%	17%	17%	17%	16%	17%	16%
Will choose closer destinations	14%	14%	21%	19%	17%	17%	17%	16%	16%	16%
Will take shorter trips	12%	13%	20%	20%	16%	16%	16%	15%	17%	16%
Spend less money on leisure travel	23%	23%	31%	28%	24%	24%	24%	22%	23%	18%
Stay with VFR vs. paid accommodations	22%	21%	24%	23%	22%	22%	22%	21%	25%	17%
Choose to drive vs. fly	24%	24%	25%	30%	24%	28%	28%	28%	27%	27%

Note: The months listed are the months in which respondents were surveyed about travel intentions and behavior. US travelers surveyed have a HH income of $50,000+ and have traveled distances of 50 miles or more in the last year.

Sources: Strategic Marketing & Research, Inc., December 2010

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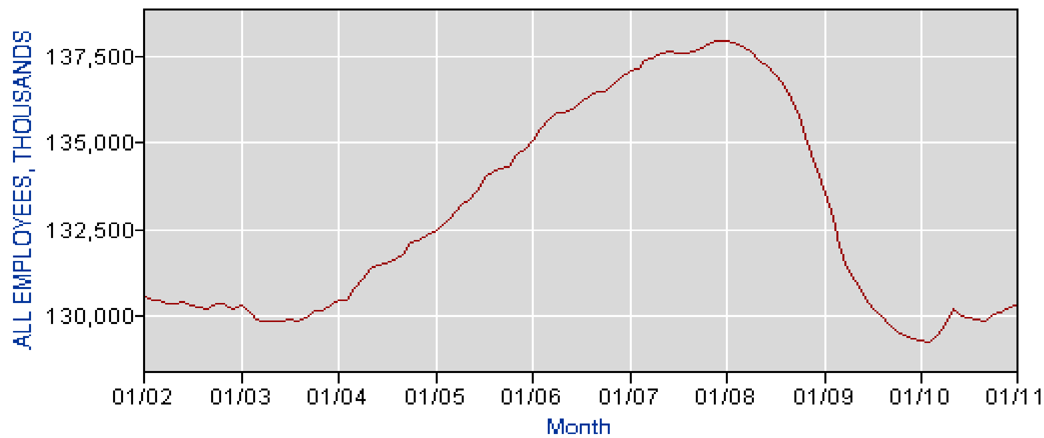
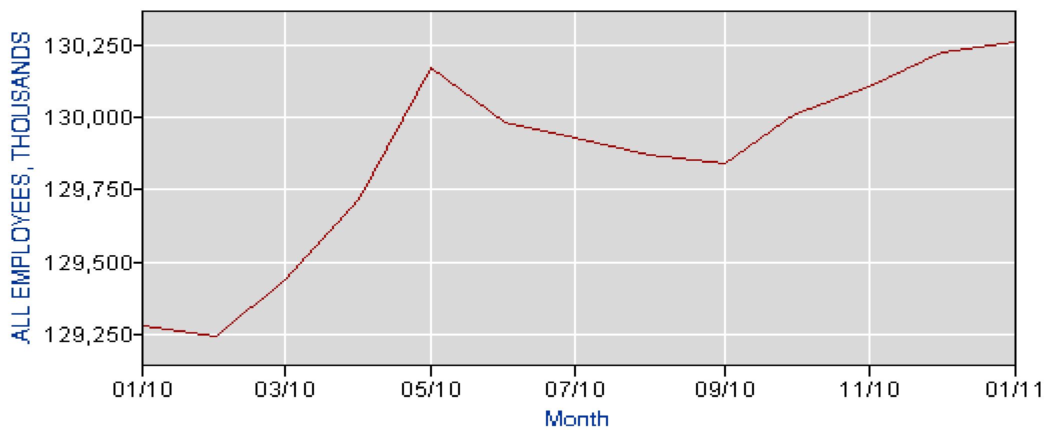
ECONOMIC INDICATORS: *DOMESTIC*

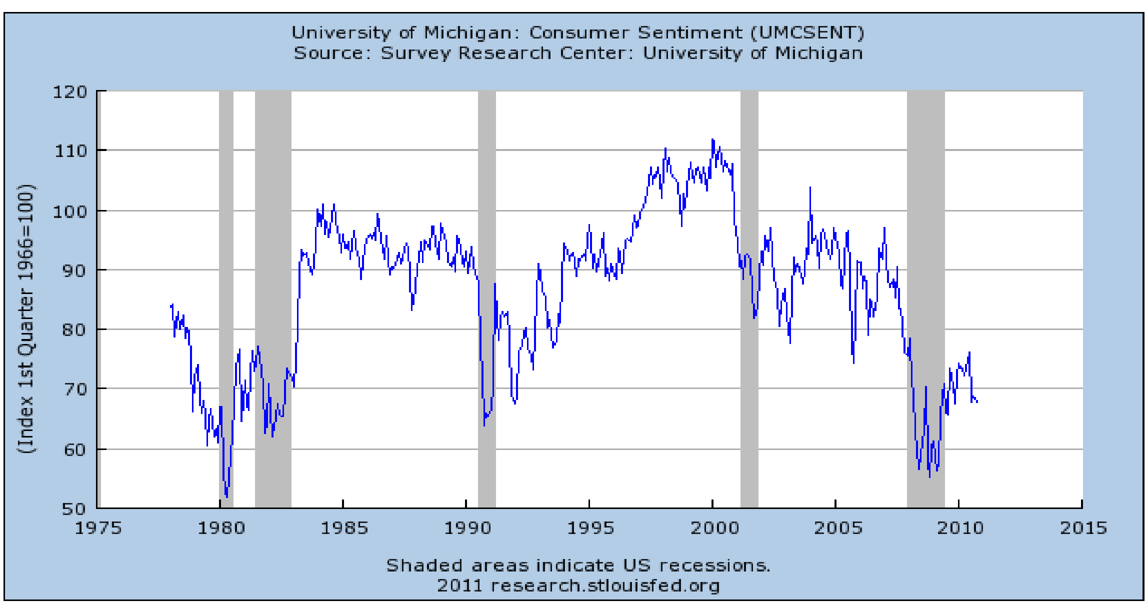
US Work Force: 2002-present



US Work Force: 2010-present



US Consumer Confidence: 1978-present



Sources: Bureau of Labor Statistics; Survey Research Center: University of Michigan

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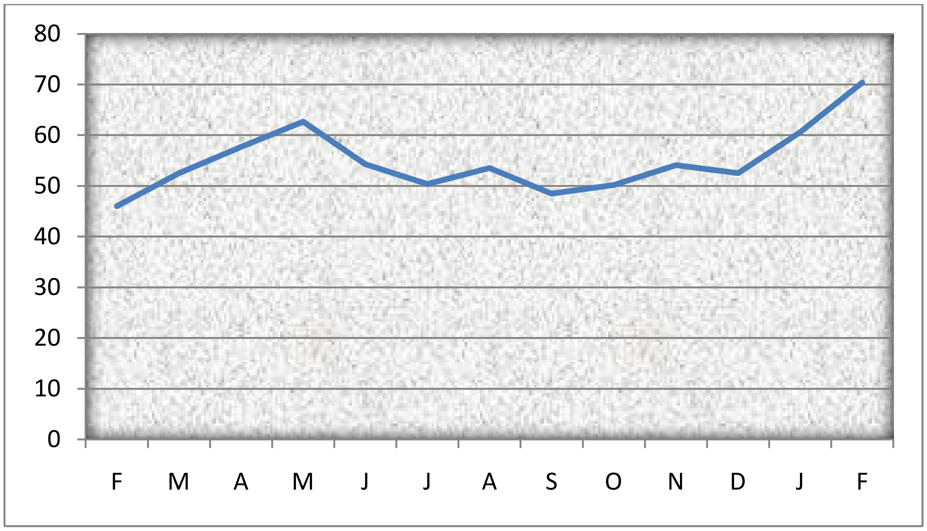
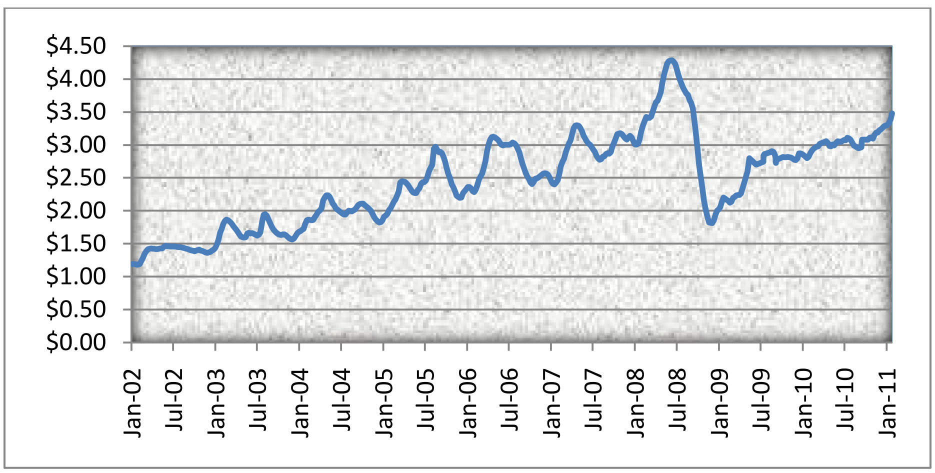
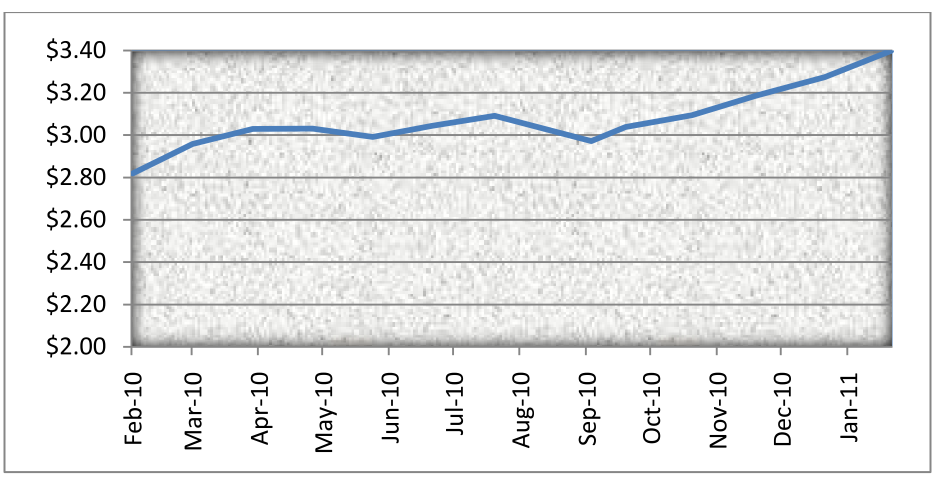
US Consumer Confidence Last 12 Months



West Coast Gas Prices: 2002-present



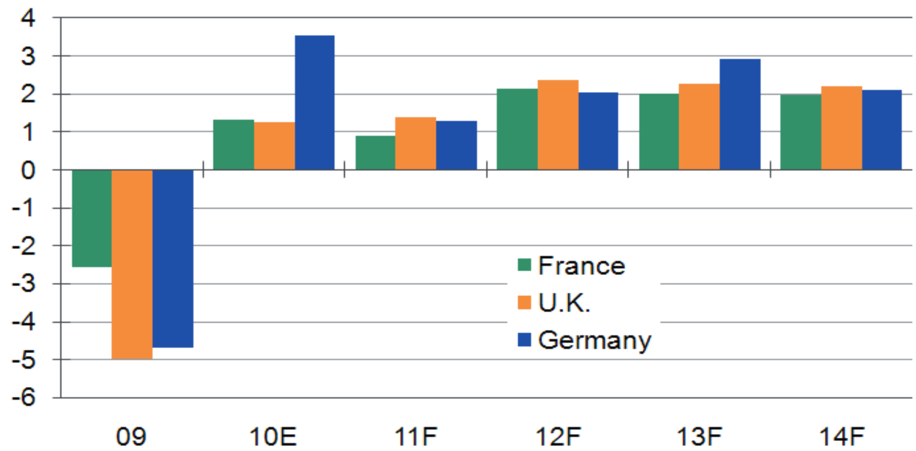
West Coast Gas Prices: Last 12 Months

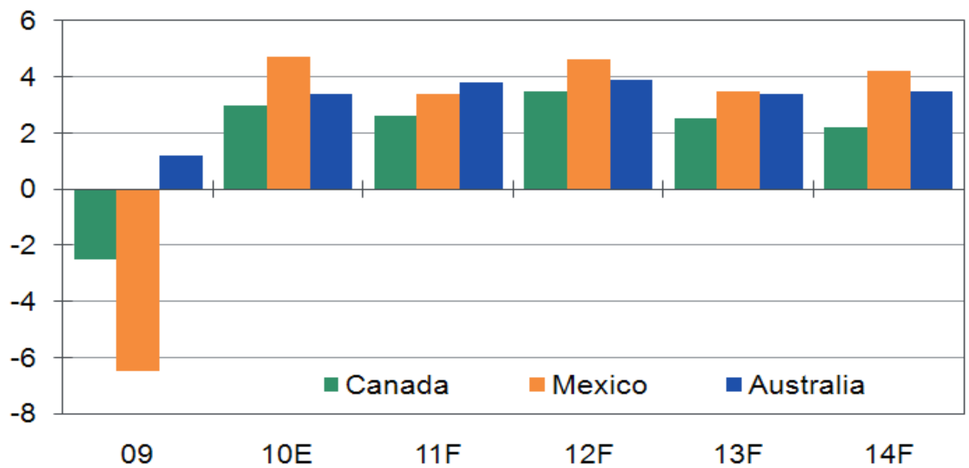


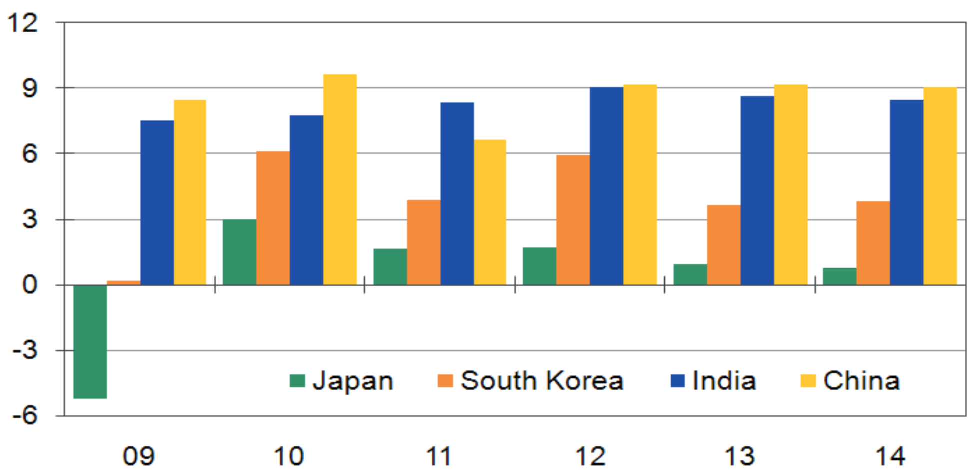
Sources: The Conference Board, Energy Information Administration

ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2009-2014(f)



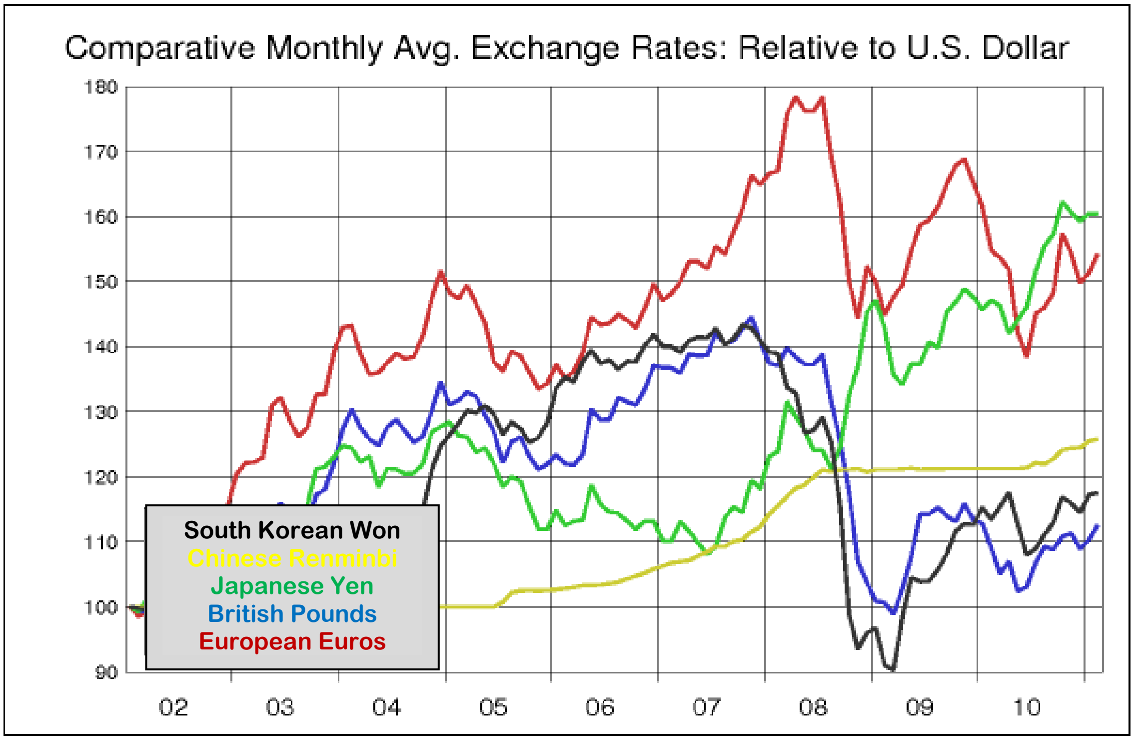




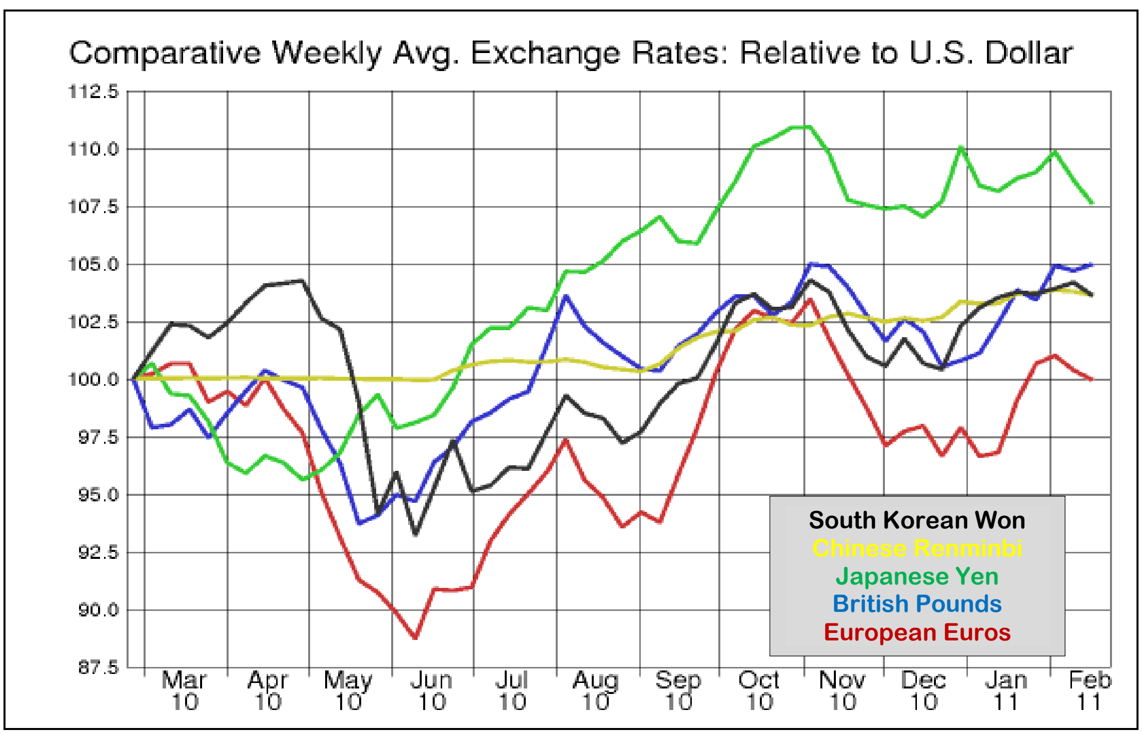
Sources: Moody's Economy.com, November 2010

Exchange Rates

Relative Change Since 2002



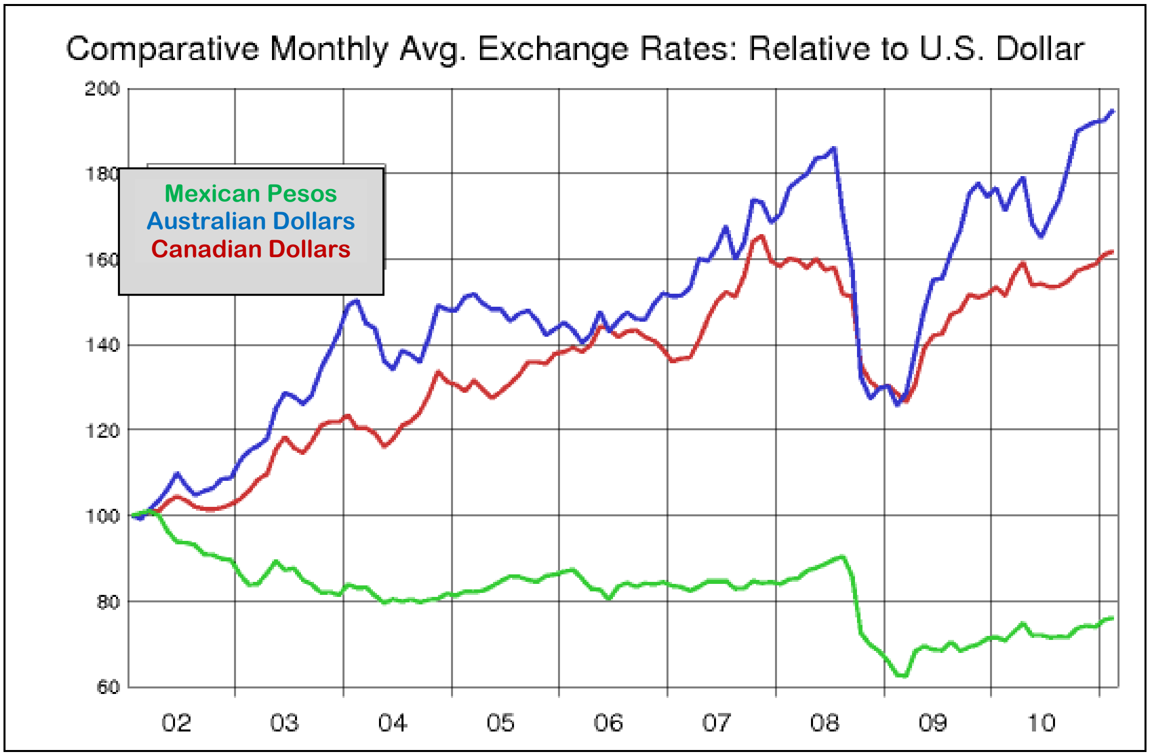
Change Last 12 Months



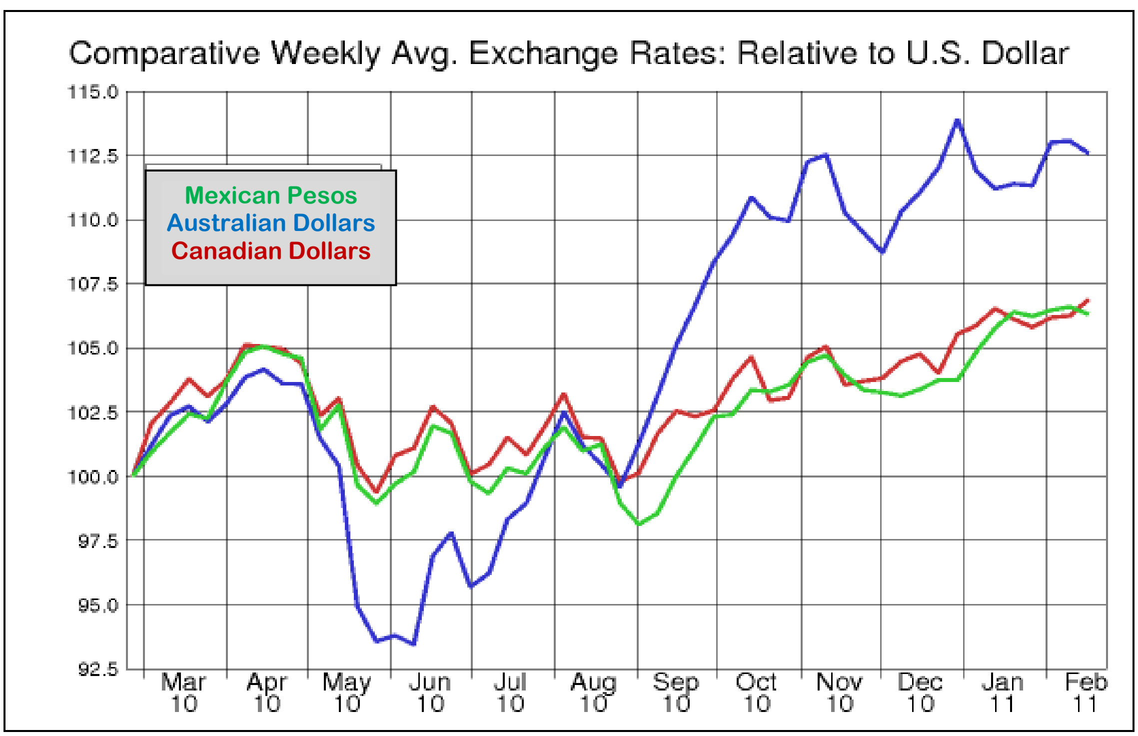
Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

Exchange Rates

Relative Change Since 2002



Change Last 12 Months



Sources: Moody's Economy.com, Pacific Exchange Rate Service – Prof. Werner Antweiler

International Non-Stop Flights and Seats

Monthly Totals, CTTC Primary Target Markets

Monthly Air Service into California, February 2011	Australia	Canada	China	France	Germany	Japan	Mexico	New Zealand	S. Korea	UK
Non-Stop Flights										
LAX	220	660	140	66	48	220	914	0	124	205
SFO	42	551	195	28	84	138	205	0	87	112
SAN	0	68	0	0	0	0	56	0	0	0
Total CA	262	1,279	335	94	132	358	1,175	0	211	317
Non-Stop Seats										
LAX	81,588	82,709	47,692	21,140	17,104	78,034	120,591	0	39,020	64,316
SFO	15,778	52,450	64,832	7,298	30,184	40,784	27,430	0	26,810	34,720
SAN	0	7,596	0	0	0	0	8,415	0	0	0
Total CA	97,366	142,755	112,524	28,438	47,288	118,818	156,436	0	65,830	99,036
Non-Stop Seats: Yr/Yr % Chg										
LAX	5%	10%	11%	12%	0%	17%	-15%	na	-4%	17%
SFO	-5%	6%	9%	0%	9%	-13%	-20%	na	23%	3%
SAN	na	14%	na	na	na	na	18%	na	na	na
Total CA	4%	9%	10%	9%	6%	4%	-15%	na	6%	12%

Data as of February 22,2011

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

FEBRUARY TRAVEL/TOURISM NEWS & TRENDS

The Power and Opportunity of the Multicultural Markets

The American Hotel & Lodging Association (AH&LA) has released a study quantifying the travel and spending power of the top five multicultural groups – African-Americans, Asian-Americans, Hispanics, Lesbian/Gay/Bisexual/Transgender (LGBT), and females.

The survey includes data points on each market's propensity to travel, frequency of travel, number of domestic travelers and hotel users, nights spent in hotels, travel-related expenditures, estimates of the size and economic value of each segment to the U.S. travel industry and specifically to the hotel industry, and a brief profile of travel activity.

The survey reveals:

- The female market is very large and active in travel; women travelers have the highest share of leisure trips among the five markets.
- African-Americans, Hispanics, and Asian-Americans are now of sufficient size to be meaningful and will grow much faster in size than the dominant non-Hispanic white population over the next several decades.
- The LGBT market is a fairly large niche market, active in travel, and responsive to efforts by the travel industry to serve its needs.
- The Hispanic population, already the largest ethnic group in the nation, is expected to increase by 34 percent over the next ten years. With total domestic travel spending of $71 billion in 2010, they are second only to women among the five groups.
- The LGBT market accounts for 5 percent of total domestic travelers, but 10 percent of total spending on domestic travel or $63 billion.
- At 47 percent, Asian-American domestic travelers have the highest share of hotel stays among the five markets and the population is forecasted to grow by 31 percent between now and 2020.
- African-Americans generated 10 percent of U.S. hotel person-trips and 9 percent of U.S. hotel person-nights in 2010

Full Whitepaper

February Articles/Surveys

Consumer Trends/News

- Gallup- January Consumer Spending Chills

Travel Trends/News

- "Neo-frugal Chic"- Luxury Travelers Brag About How Much They are Saving, Not Spending
- Virtuoso- Annual Survey Reports on Luxury Travel 2011

International Trends/News

- Japan and Germany Projected Bookings for Travel to the US Show Growth Through 4th Q. 2010

Group/Business Trends/News

- 2011 Incentive Trends Survey
- Association Use of Virtual Conferences to Triple, Report Shows
- Meeting Planners Optimism Rising
- Future Watch 2011-Executive Summary

MeringCarson