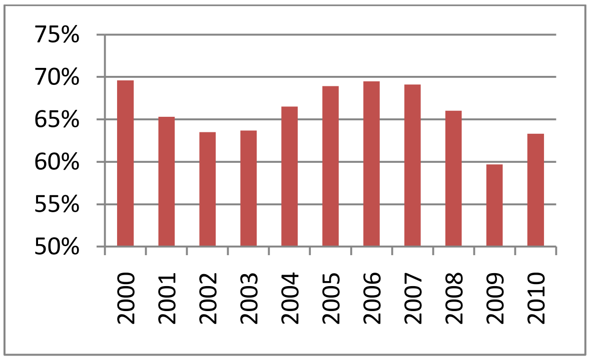
July 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

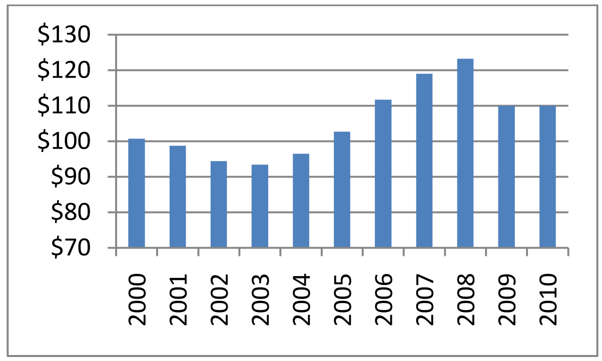
Detailed Lodging Tables

Link to Data Charts

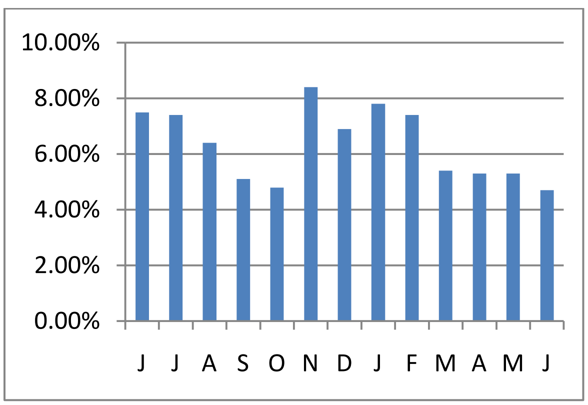
CA Occupancy: 2000-2010



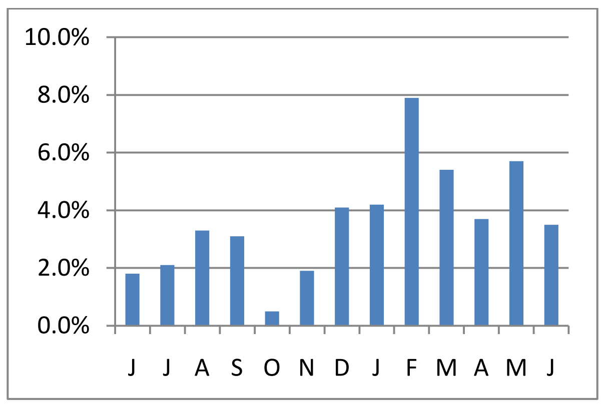
CA ADR: 2000-2010



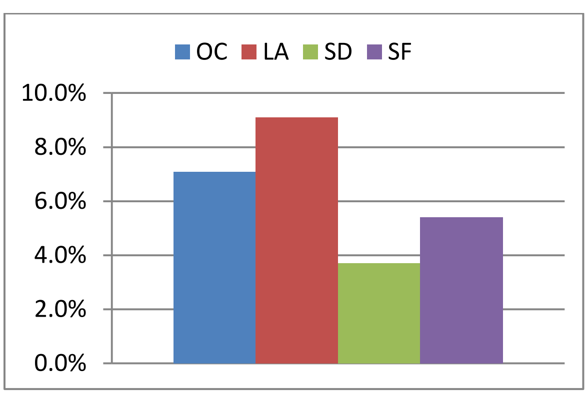
CA Occupancy Yr/Yr Chg: Last 12 Months



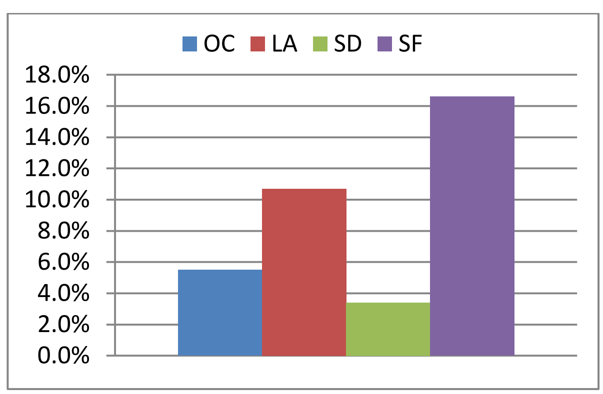
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: July 2011



Preliminary CA ADR Yr/Yr Chg: July 2011

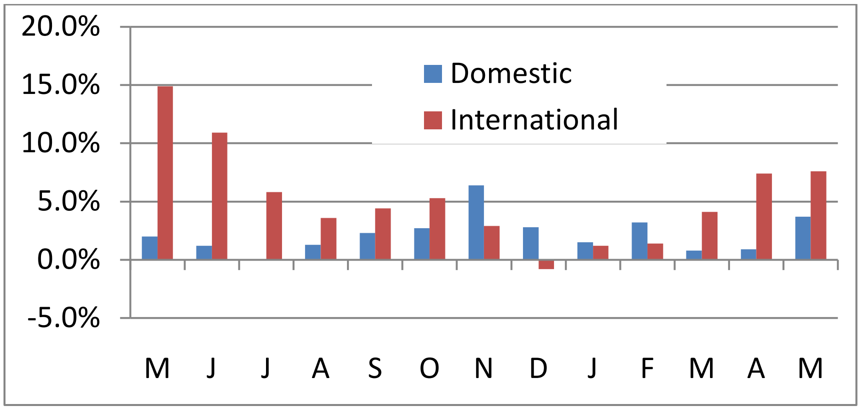


Source: Smith Travel Research

July 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

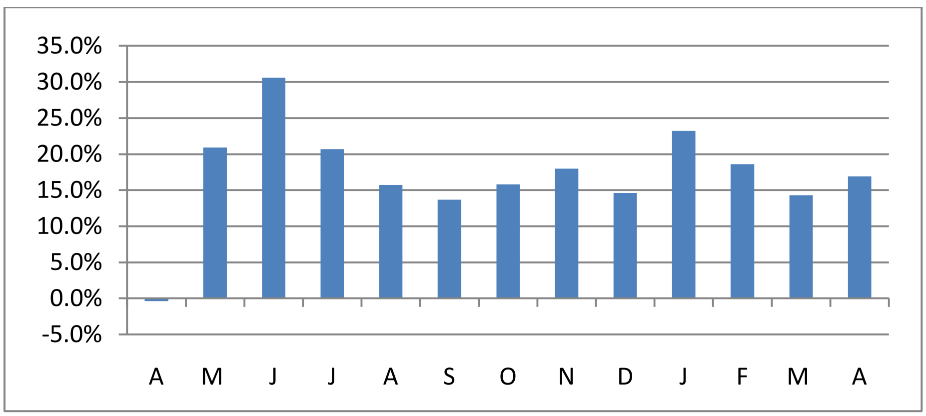
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

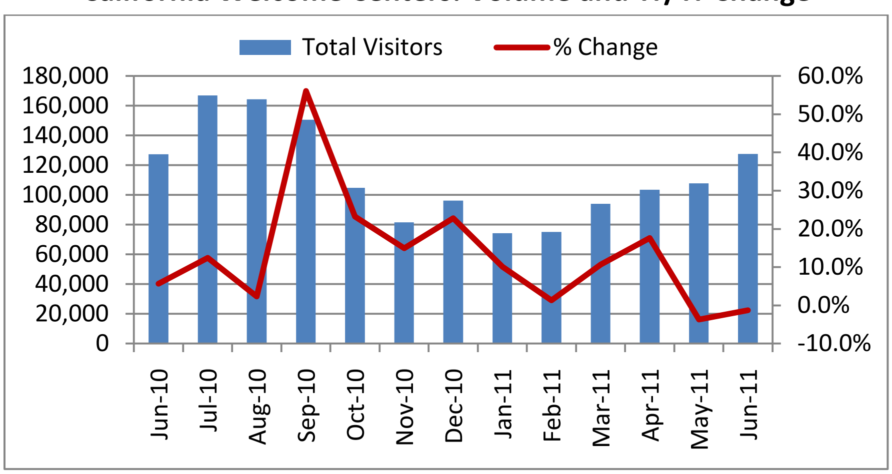


Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



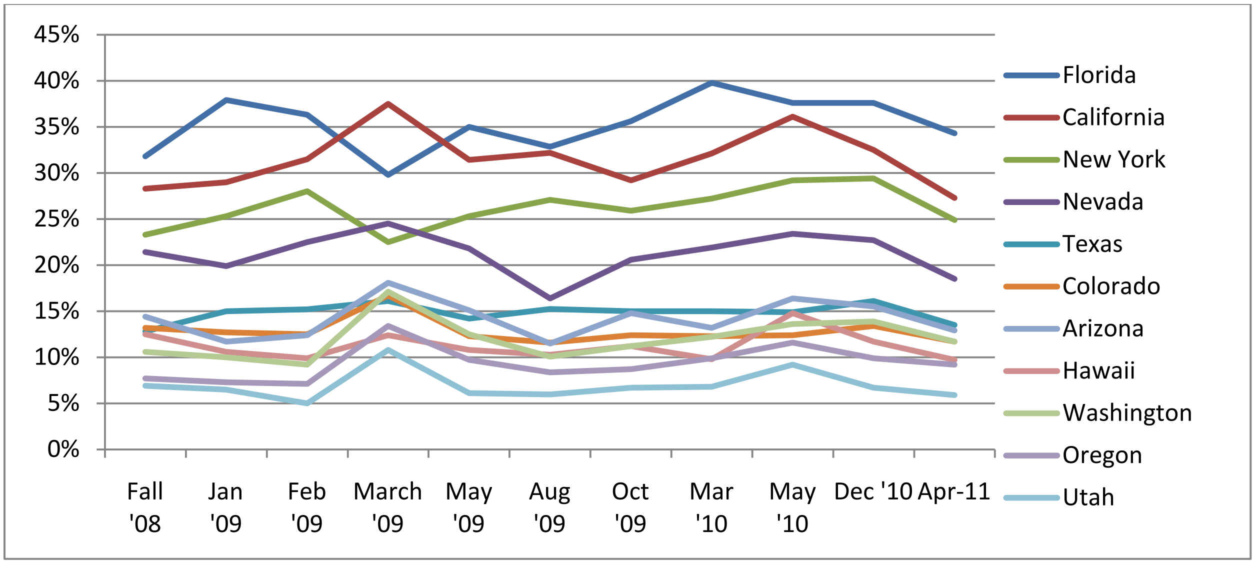
California Welcome Centers: Volume and Yr/Yr Change



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

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	Apr '11
Primary	50%	45%	48%	49%	50%	52%	47%	47%	55%	51%	49%	40%
National	18%	20%	20%	23%	29%	21%	24%	21%	21%	28%	24%	18%
In-State	79%	71%	74%	75%	82%	78%	77%	72%	90%	81%	75%	74%

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	Apr '11
Will take fewer trips	25%	29%	21%	22%	17%	17%	17%	16%	17%	16%	18%
Will choose closer destinations	14%	14%	21%	19%	17%	17%	17%	16%	16%	16%	19%
Will take shorter trips	12%	13%	20%	20%	16%	16%	16%	15%	17%	16%	17%
Spend less money on leisure travel	23%	23%	31%	28%	24%	24%	24%	22%	23%	18%	21%
Stay with VFR vs. paid accommodations	22%	21%	24%	23%	22%	22%	22%	21%	25%	17%	17%
Choose to drive vs. fly	24%	24%	25%	30%	24%	28%	28%	28%	27%	27%	30%

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., April 2011

Travel Trade Barometer Projections

CTTC International Markets

Canada Travel Trade Barometer 2011 S2												
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 4-9%	91%	9%	0%	Higher	82%	18%	0%	Higher	82%	18%	0%
California	Up 4-9%	91%	9%	0%	Higher	100%	0%	0%	Higher	91%	9%	0%

United Kingdom Travel Trade Barometer 2011 S2												
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVE	↑	NC	↓	AVE	↑	NC	↓	AVE	↑	NC	↓
U.S.	Down 1-3%	31%	23%	46%	AS	33%	17%	50%	AS	33%	50%	17%
California	Down 1-3%	0%	39%	46%	AS	33%	25%	33%	AS	58%	17%	17%

Germany Travel Trade Barometer 2011 S2												
	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Down 1-3%	40%	10%	50%	AS	57%	21%	21%	AS	57%	21%	21%
California	NC	45%	15%	40%	Higher	64%	14%	21%	AS	57%	29%	14%

Mexico Travel Trade Barometer 2011 S2												
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	up 4-9%	100%	0%	0%	Higher	86%	14%	0%	Higher	86%	14%	0%
California	up 10-15%	100%	0%	0%	Higher	100%	0%	0%	MH	100%	0%	0%

Japan Travel Trade Barometer 2011 S1 R7												
Change in Bookings	1st Qtr 2011 (P)				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓
U.S. Mainland	NC	44%	19%	38%	Lower	19%	13%	69%	AS	25%	19%	56%
California	NC	38%	31%	31%	Lower	19%	6%	75%	AS	25%	13%	63%

China Travel Trade Barometer 2011

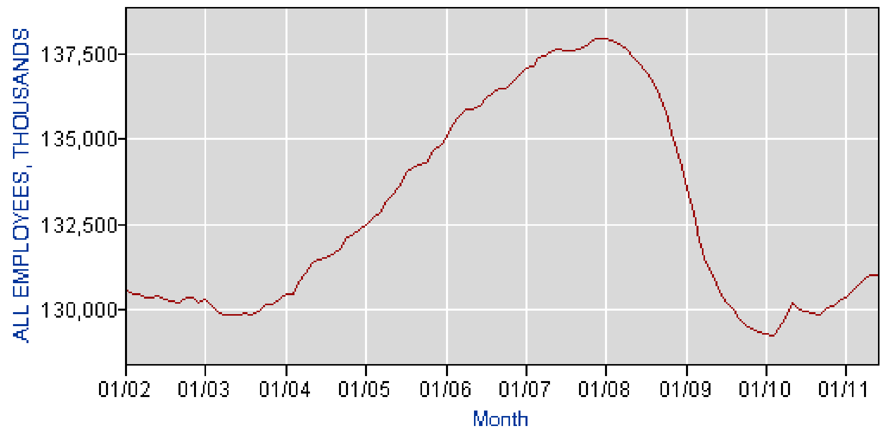
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S. including Hawai'i and Guam	Increased 10% to 15%	92%	0%	8%	Higher	96%	4%	0%	Higher	84%	12%	4%
U.S. Mainland only	Increased 10% to 15%	83%	13%	4%	Higher	88%	13%	0%	Higher	79%	17%	4%

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'.

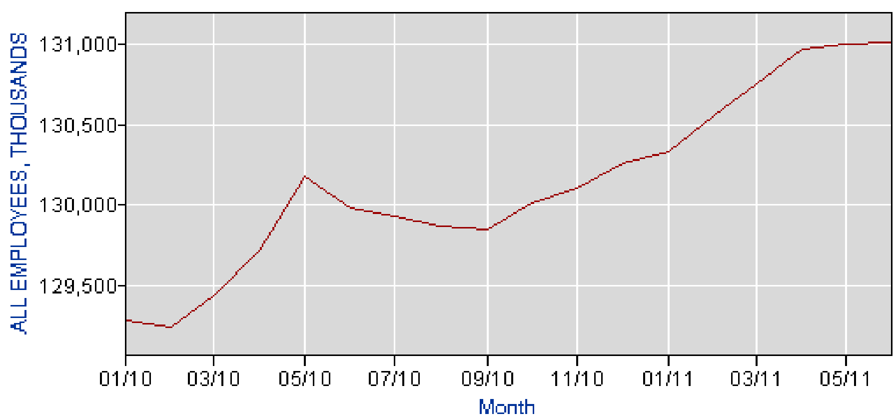
Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: *DOMESTIC*

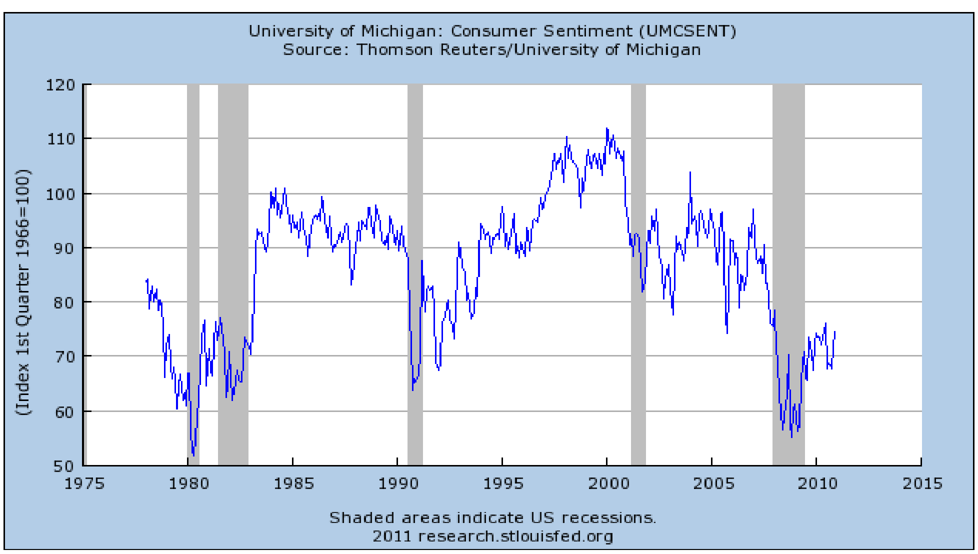
US Work Force: 2002-present



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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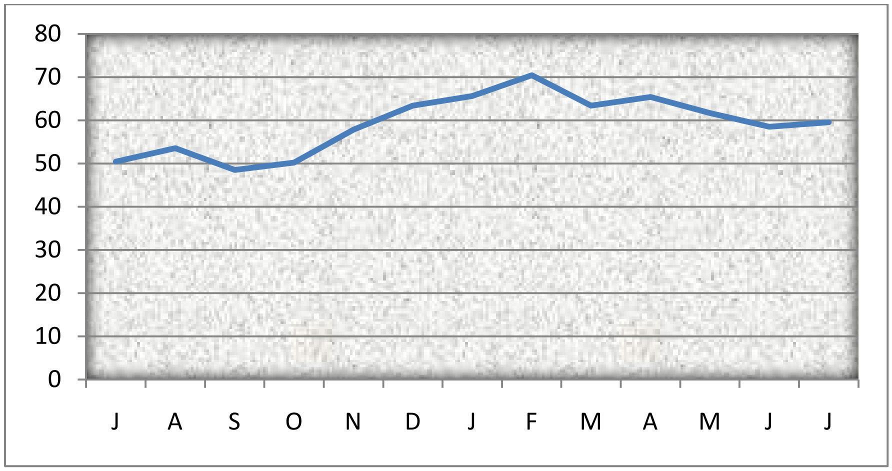
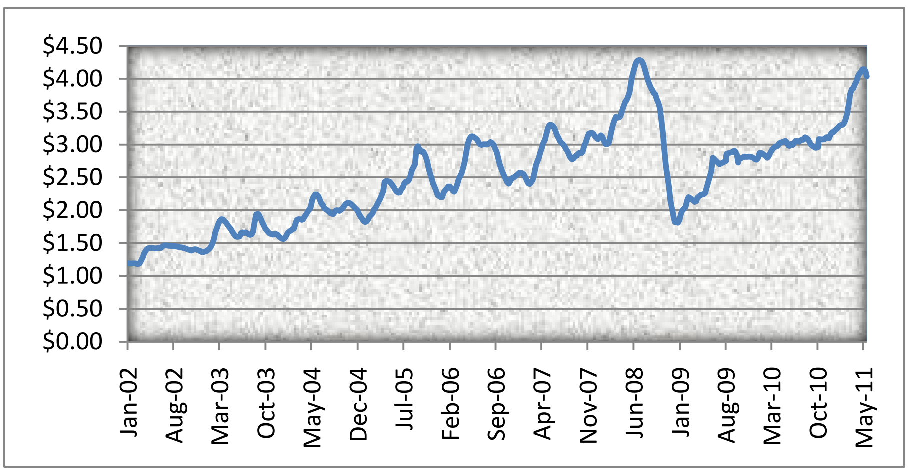
California Travel & Tourism Commission
Monthly Tracking Dashboard

US Consumer Confidence Last 12 Months

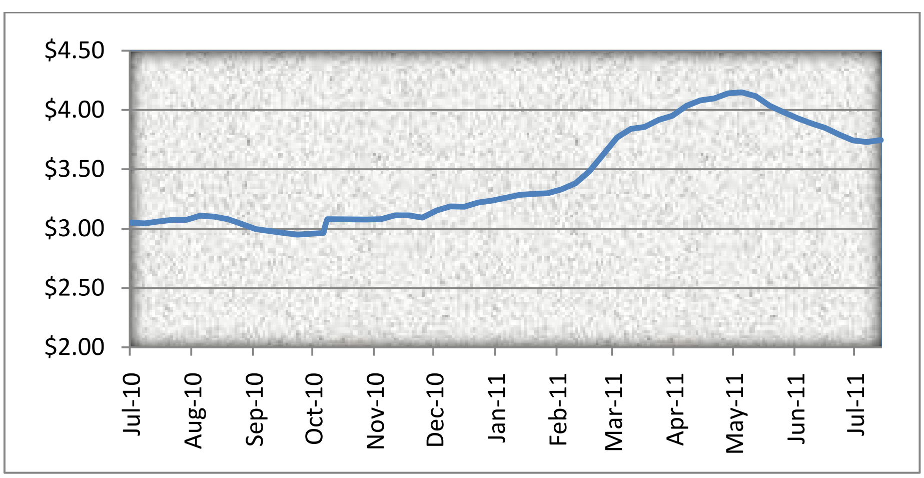


Note: Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



West Coast Gas Prices: Last 12 Months



Sources: The Conference Board, Energy Information Administration

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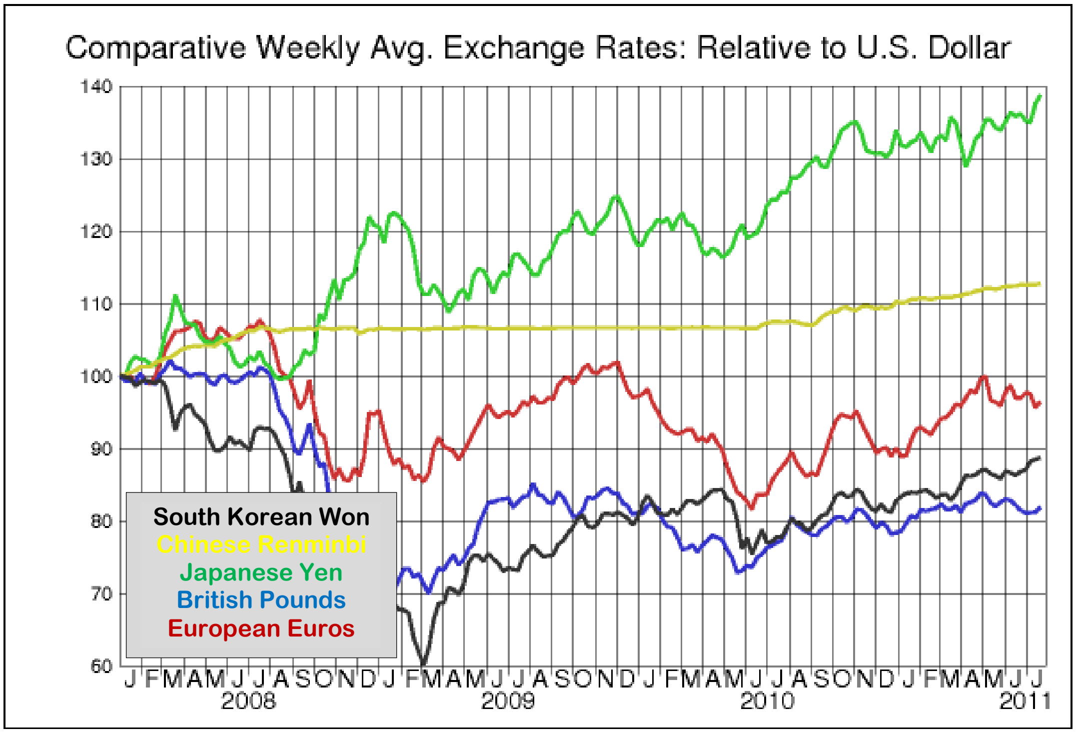
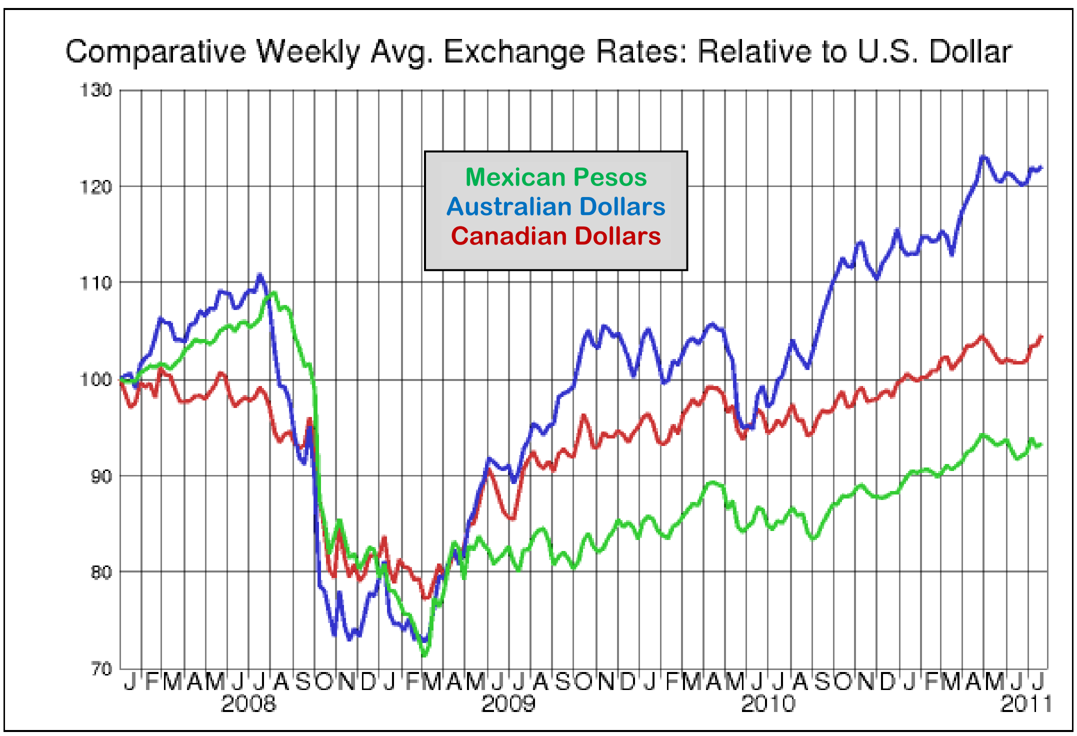
Monthly Tracking Dashboard

Exchange Rate

Relative Change Since 2008





Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

International Non-Stop Flights and Seats

Monthly Totals, California's Top Markets

Overseas Air Service into California, July 2011	Australia	China	France	Germany	Japan	S. Korea	UK
Non-Stop Flights							
LAX	244	230	118	107	264	168	249
SFO	31	217	44	135	186	123	155
SAN	0	0	0	0	0	0	31
Total CA	275	447	162	242	450	291	435
Non-Stop Seats							
LAX	91,274	73,932	36,949	37,742	89,703	51,560	79,166
SFO	11,594	76,353	20,214	49,304	58,528	37,222	50,871
SAN	0	0	0	0	0	0	7,006
Total CA	102,868	150,285	57,163	87,046	148,231	88,782	137,043
Non-Stop Seats: Yr/Yr % Chg							
LAX	6%	35%	-1%	4%	24%	17%	3%
SFO	-37%	0%	17%	11%	-4%	10%	0%
SAN	na	na	na	na	na	na	100%
Total CA	-1%	15%	5%	8%	11%	14%	7%

International Air Service into California, July 2011	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	62	7,993	136%
LAX	770	96,975	2%	1,060	142,483	-14%
OAK	0	0	na	85	11,305	0%
ONT	0	0	na	31	3,870	124%
PSP	13	1,768	55%	0	0	na
SAN	85	9,731	13%	71	10,202	110%
SFO	769	81,252	-7%	283	38,712	4%
SJC	0	0	na	73	10,093	-15%
SMF	0	0	na	30	4,234	-41%
SNA	62	8,432	127%	0	0	na
Total CA	1,699	198,158	1%	1,695	228,892	-6%

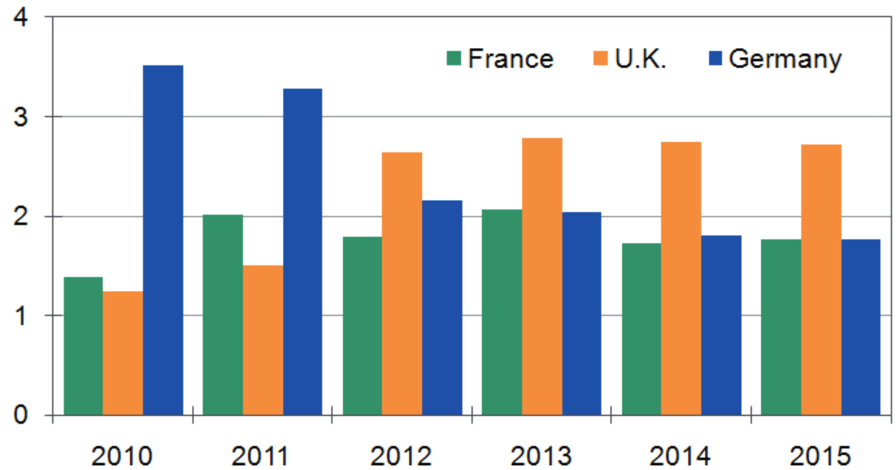
Data as of July 26, 2011

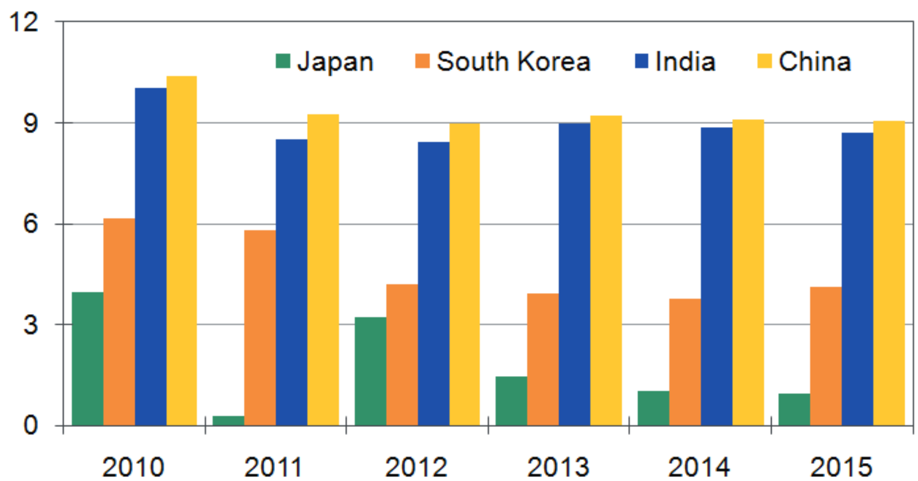
Note: Seats and flights for total California may be greater than sum of rows because of international air service into other California airports.

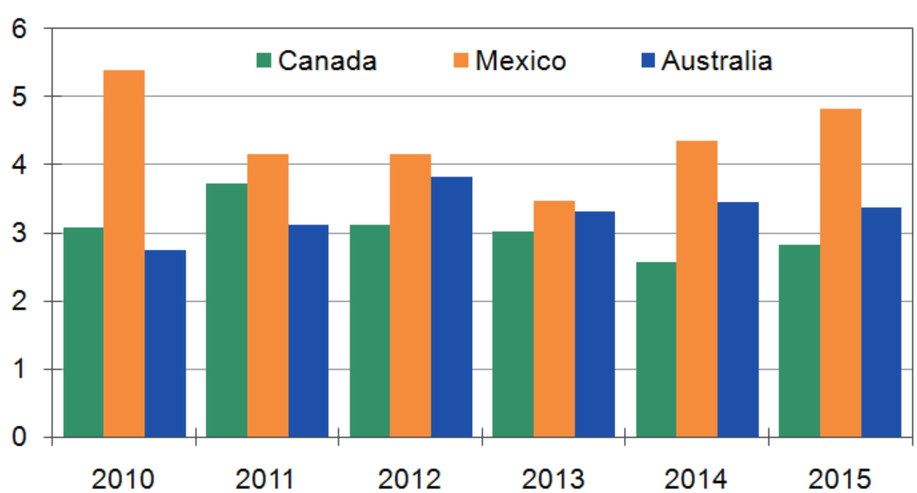
Source: OAG

ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2010-2015(f)







Sources: Moody's Economy.com, May 2011

JULY TRAVEL/TOURISM NEWS & TRENDS

Featured Survey:

The Future of Luxury Travel – Global Trends

International Luxury Travel Market (ILTM) has launched a global research project on the luxury travel industry. The objective of the research is two-fold: to identify key supply and demand trends, and to explore the future of the business relationship between buyers and suppliers. This report additionally seeks to establish benchmarks for the global luxury travel industry.

Emerging destination trends

Research with luxury travel buyers indicates an expanding number of destinations now growing in popularity, with a demand by travelers for increased diversity:

- More privacy, less ostentation
- Increase in demand for open-range excursions
- A growing interest in off-the-beaten-track destinations.
- Destinations with appeal to environmentally concerned and culturally interested travelers

Five key trends that will affect the luxury travel industry

- Emerging destinations will gain in importance
- The need for personalization will continue to impact the luxury travel industry
- The luxury travel industry will continue to recover from the financial crisis
- Awareness of value will continue to impact travel decisions
- Simplicity and seamless service rank highly among the main expectations of travelers

Full Survey

July Articles/Surveys

Travel Trends/News

- The Latest Travel Trend is Incorporating Tech Into Offerings at Hotels, Airports, on Airplanes And More – Fast Company
- Consumers Failing to Let Go of Social Media Even When on Holiday-Half of leisure travelers say they check and update their social networks while on holiday-Tnooz
- Survey: Travelers Will Pay for Better Airport Security Experience - 61% of Leisure Travelers, 75% of Business Travelers Want Trusted Traveler Program; Nearly Half of Air Travelers Willing to Pay up to $150 Annual Fee for Less Hassle-U.S. Travel Association
- Weak Dollar Good News for North America's Travel Market - The dollar that has hovered about US$1.40 to the euro has helped promote tourism in two ways: by increasing foreign travel and by encouraging Americans to tend to travel more in the US.-TravelMole

International Trends/News

- Red Carpet for the Chinese - Hotels Add Menu Items, Translators, Other Services for Growing Travel Segment-WSJ

Group/Business Trends/News

- Virtual Event Attendees Look for Information Over Networking - Downloading content and viewing webcasts most common virtual event activities-eMarketer