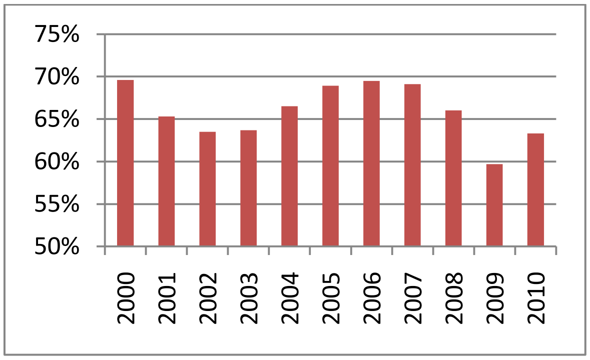
June 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

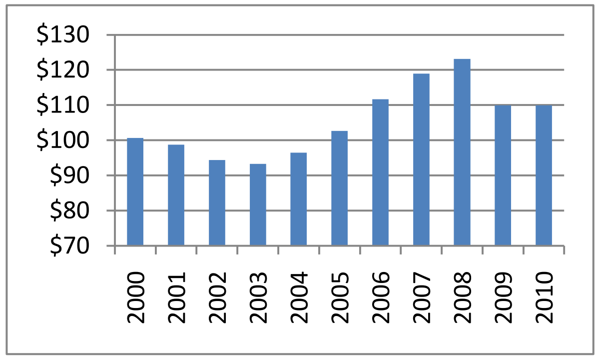
Detailed Lodging Tables

Link to Data Charts

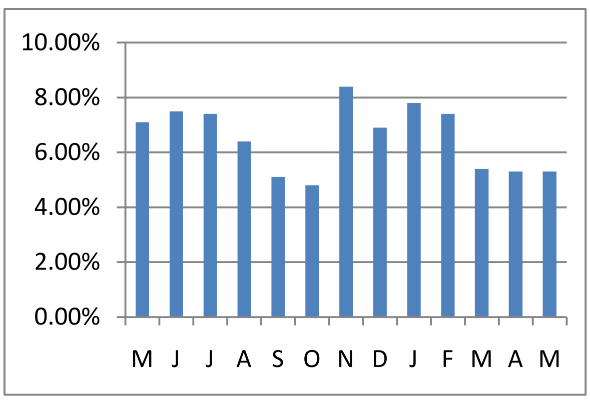
CA Occupancy: 2000-2010



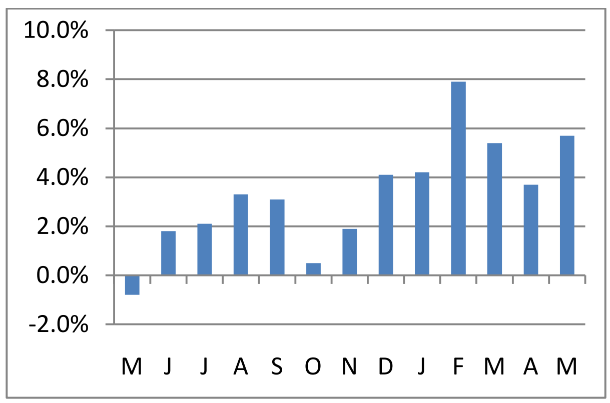
CA ADR: 2000-2010



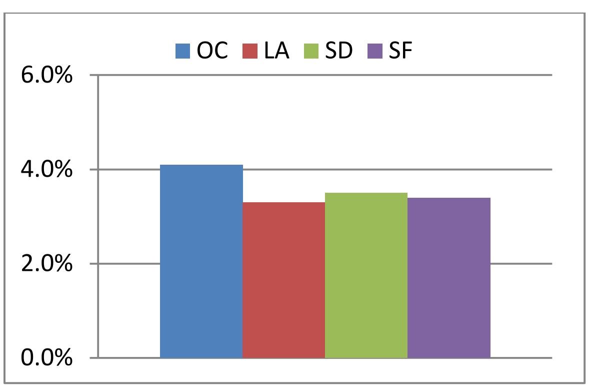
CA Occupancy Yr/Yr Chg: Last 12 Months



CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: June 2011



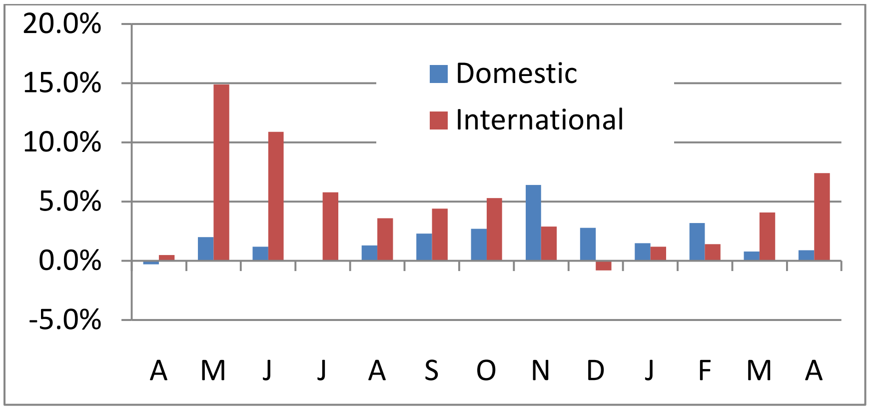
Preliminary CA ADR Yr/Yr Chg: June 2011

Source: Smith Travel Research

June 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

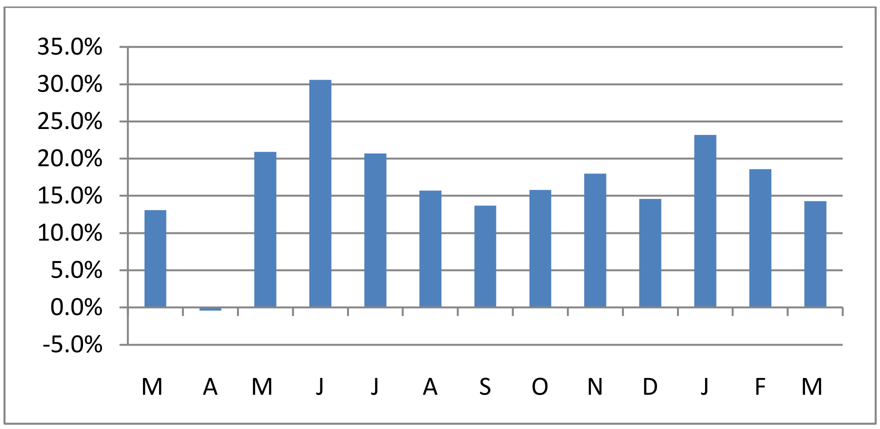
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

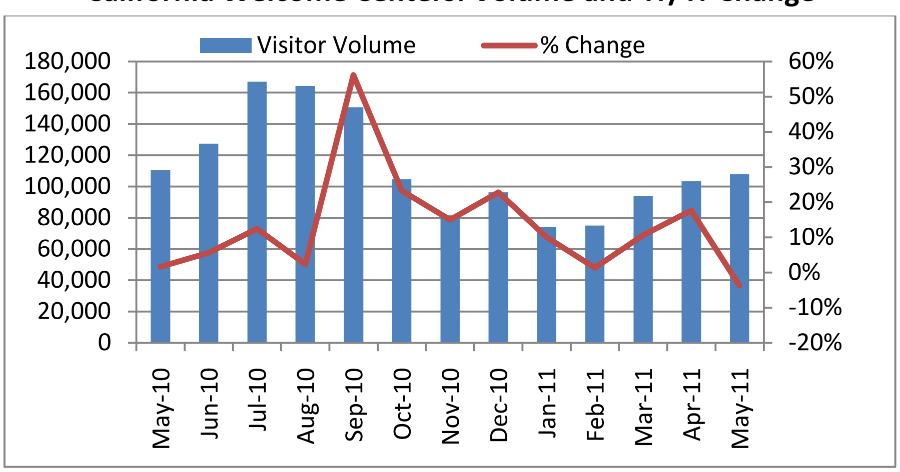


Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



California Welcome Centers: Volume and Yr/Yr Change

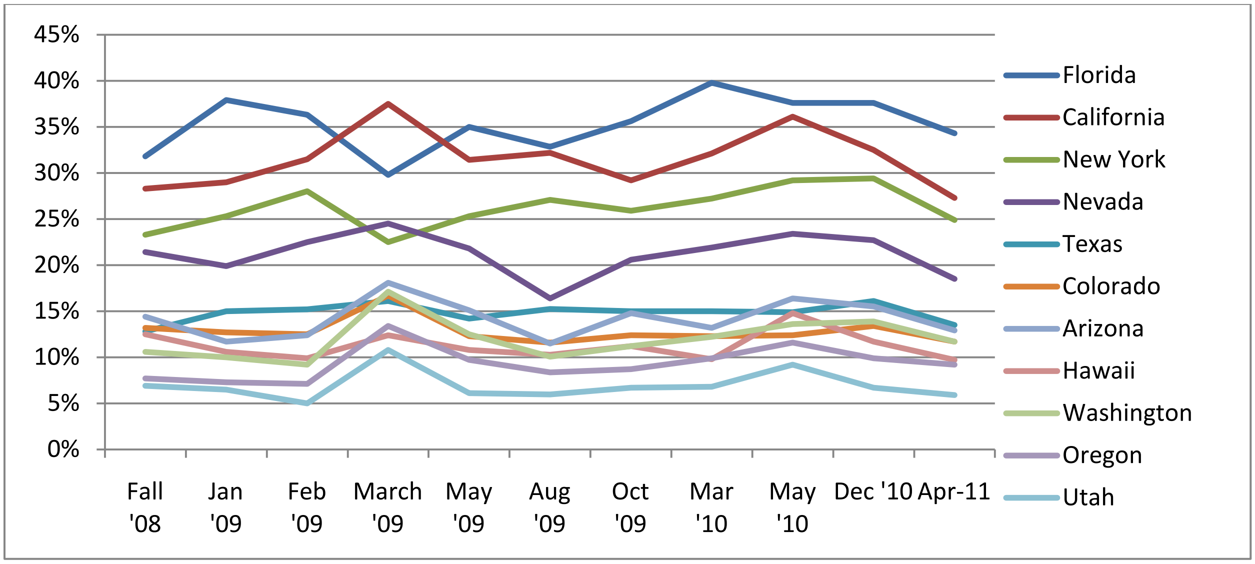


Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year.

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

June 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

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%

China Travel Trade Barometer 2011

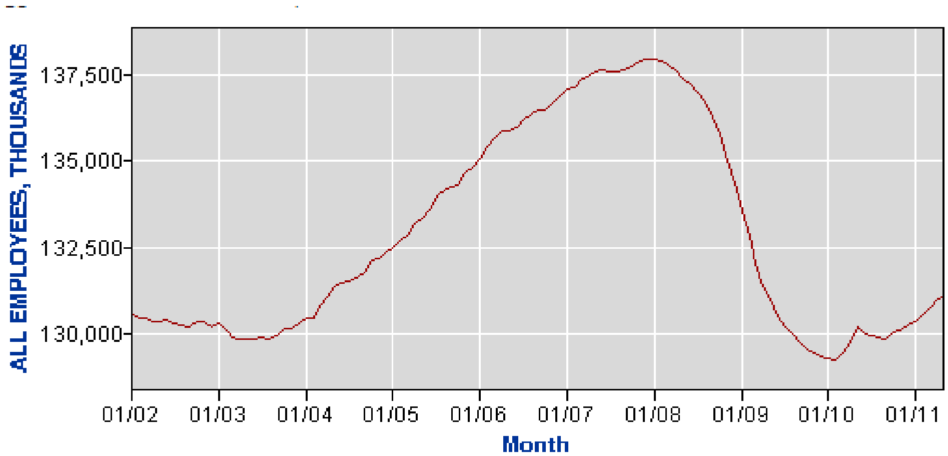
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S. including Hawai'i and Guam	Increased 10% to 15%	92%	0%	8%	Higher	96%	4%	0%	Higher	84%	12%	4%
U.S. Mainland only	Increased 10% to 15%	83%	13%	4%	Higher	88%	13%	0%	Higher	79%	17%	4%

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'.

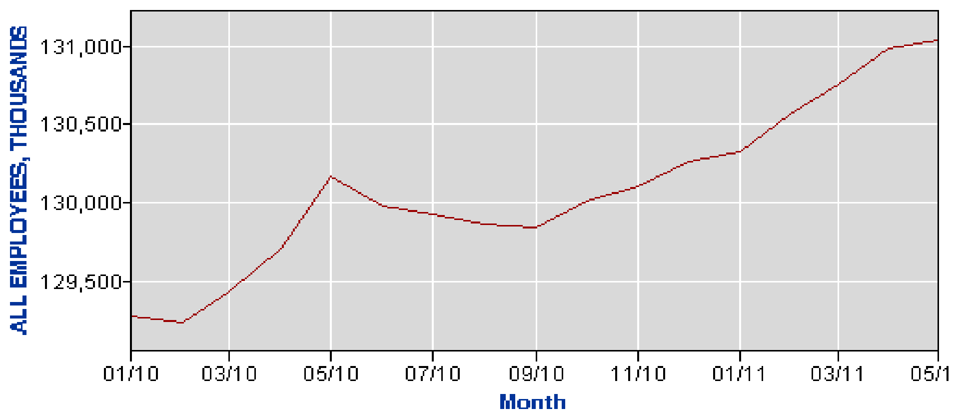
Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: *DOMESTIC*

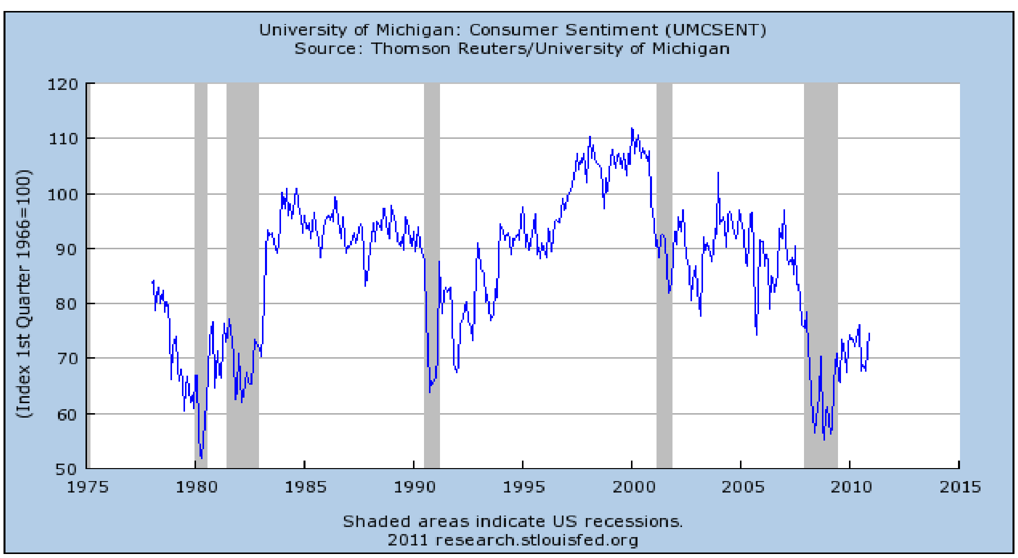
US Work Force: 2002-present



US Work Force: 2010-present

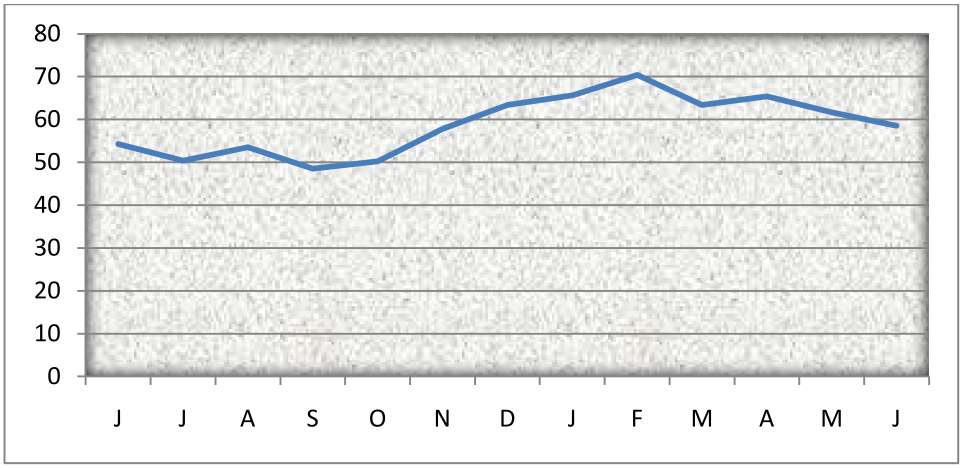


US Consumer Confidence: 1978-present



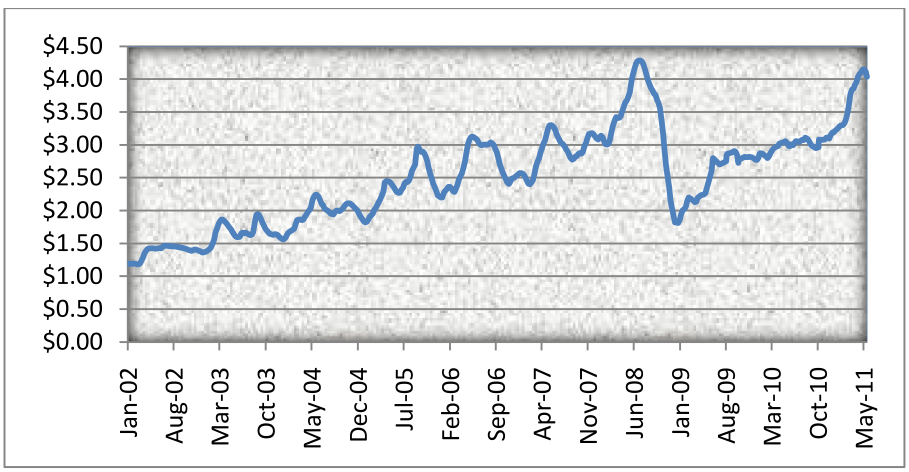
Sources: Bureau of Labor Statistics; Survey Research Center: University of Michigan

US Consumer Confidence Last 12 Months

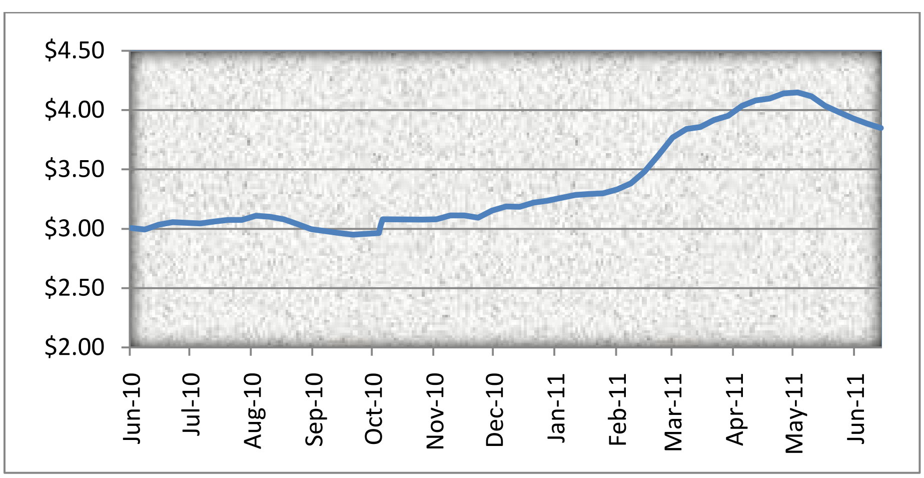


Note: Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



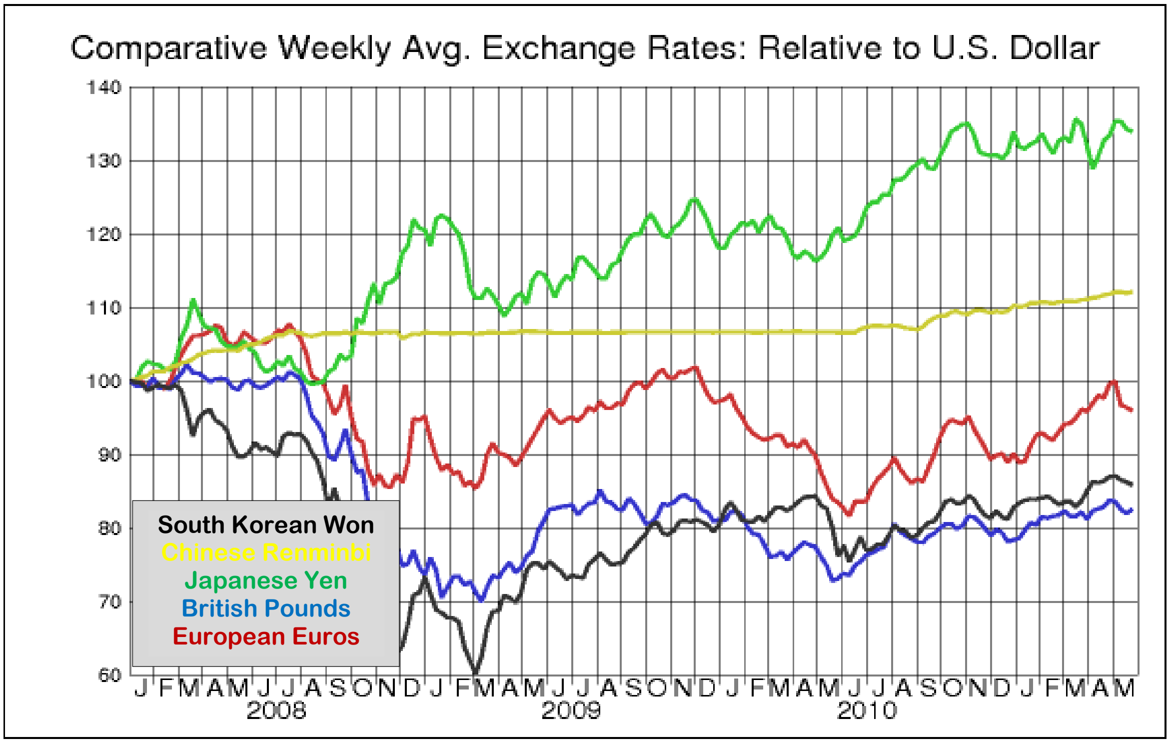
West Coast Gas Prices: Last 12 Months

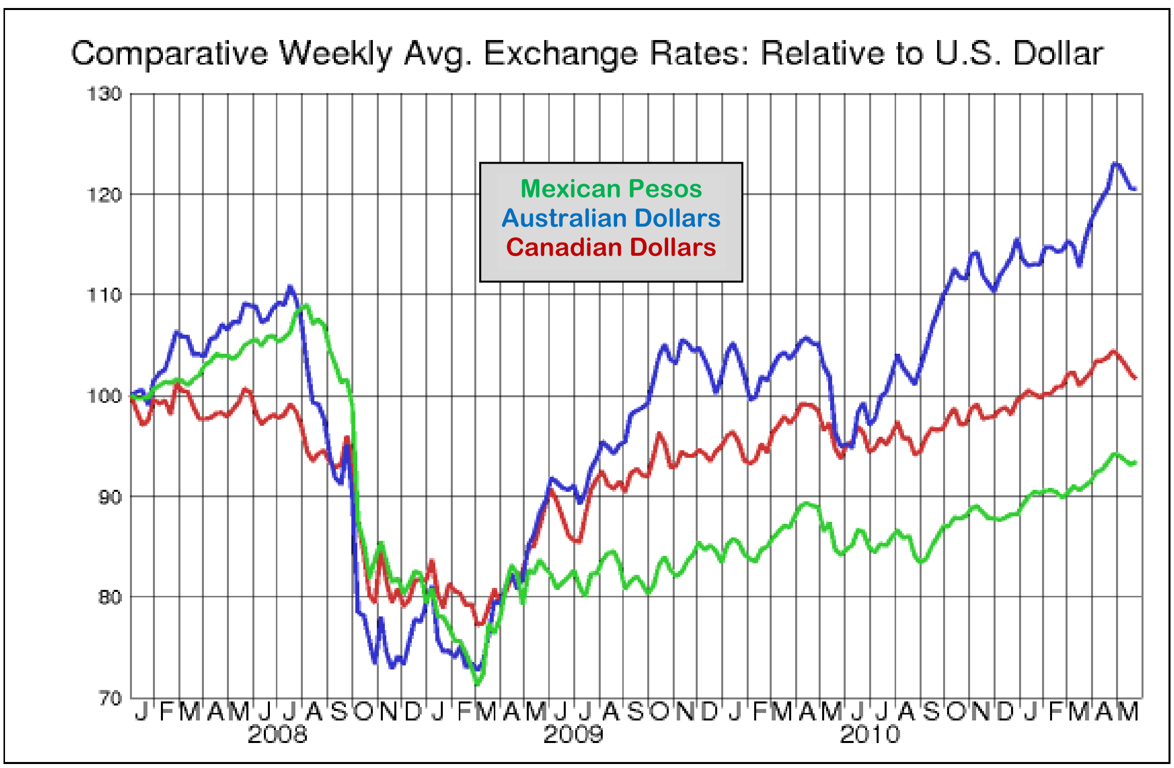


Sources: The Conference Board, Energy Information Administration

Exchange Rate

Relative Change Since 2008





Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

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International Non-Stop Flights and Seats

Monthly Totals, California's Top Markets

Overseas Air Service into California, June 2011	Australia	China	France	Germany	Japan	S. Korea	UK
Non-Stop Flights							
LAX	234	223	115	94	265	144	240
SFO	30	210	41	128	180	120	150
SAN	0	0	0	0	0	0	30
Total CA	264	433	156	222	445	264	420
Non-Stop Seats							
LAX	87,564	71,714	35,761	32,958	83,138	45,280	76,388
SFO	11,220	73,890	18,622	46,920	56,640	36,300	49,230
SAN	0	0	0	0	0	0	6,780
Total CA	98,784	145,604	54,383	79,878	139,778	81,580	132,398
Non-Stop Seats: Yr/Yr % Chg							
LAX	5%	35%	11%	5%	14%	11%	6%
SFO	-34%	0%	45%	13%	-5%	16%	5%
SAN	na	na	na	na	na	na	6780%
Total CA	-1%	14%	21%	9%	5%	13%	11%

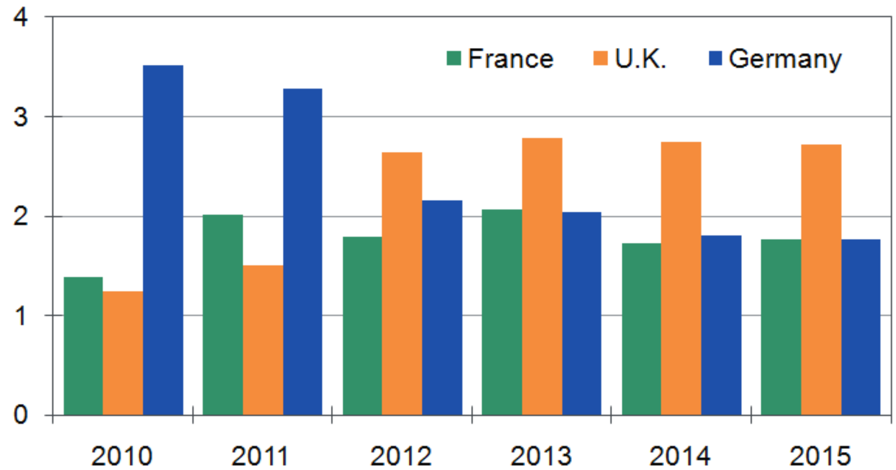
International Air Service into California, June 2011	Canada			Mexico		
	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change
FAT	0	0	na	60	7,710	121%
LAX	719	89,746	7%	992	132,216	-10%
OAK	0	0	na	90	11,970	14%
ONT	0	0	na	30	3,720	na
PSP	13	1,768	70%	0	0	na
SAN	81	9,246	51%	35	5,370	14%
SFO	686	71,899	-3%	252	33,673	-7%
SJC	0	0	na	67	9,247	-4%
SMF	0	0	na	13	2,041	-62%
SNA	48	6,528	81%	0	0	na
Total CA	1,547	179,187	6%	1,539	205,947	-5%

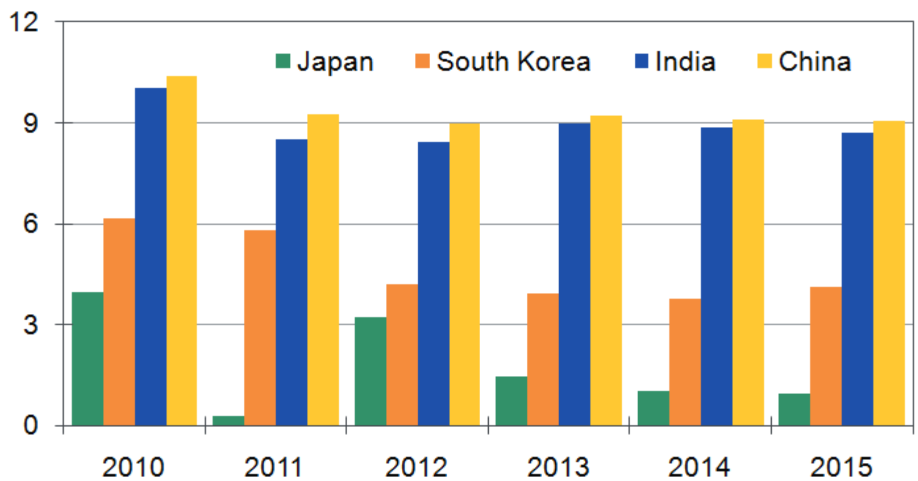
Data as of June 27,2011
Note: Seats and flights for total California may be greater than sum of rows because of international air service into other California airports.
Source: OAG

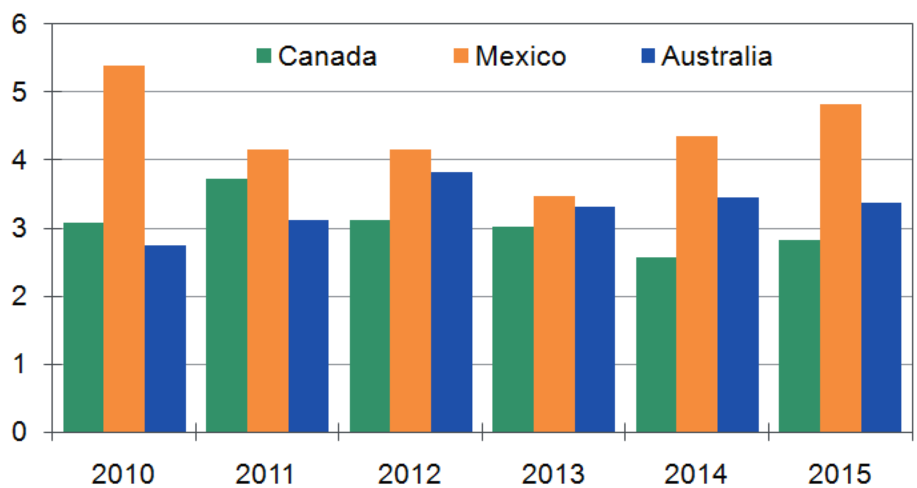
June 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2010-2015(f)







Sources: Moody's Economy.com, May 2011

JUNE TRAVEL/TOURISM NEWS & TRENDS

The Travel Service Decision Funnel- Ypartnership

"...Consumers today are autonomous – both by choice and necessity. They have become more insular with a closely-knit sphere of influence, and this is affecting how they both arrive at and make purchase decisions. Family and friends are essentially tied with traditional media as the places they find ideas and inspiration for making travel plans. Family and friends 'win' as a trusted source for insights and advice. Then the Internet dominates as consumers move closer to making an actual purchase decision."

The key sources of information for each phase in the travel decision-making "funnel" include:

Sources of Information Used For Travel Service Purchase Decisions (Top 5 per Category)

Ideas and Inspiration	Insights and Advice	Pricing	Comparing	Purchasing
Relationships & Media	*Trusted Sources*	*Diligent Info Gathering from Multiple Sources*	*Impartial Aggregation*	*Best Deal*
Family/friends (52%)	Family/friends (54%)	Online Travel Agency (1) (56%)	Online Travel Agency (1) (51%)	Online Travel Agency(1) (41%)
Magazines (49%)	Travel guide books (44%)	Travel service suppliers' own websites (2) (51%)	Internet search websites(3) (38%)	Travel service suppliers' own websites (2) (38%)
Television (48%)	Internet search websites (3) (38%)	Internet search websites (3) (37%)	Travel service suppliers' own websites (2) (35%)	Traditional travel agents (23%)
Travel guide books (46%)	Travel experts (38%)	Multi-brand website (4) (35%)	Multi-brand website (4) (32%)	Multi-brand website (4) (18%)
Travel brochures/ Direct Mail (43%)	Destinations' websites (37%)	Destinations' websites (34%)	Destinations' websites (25%)	Destinations' websites (17%)

Full Article

June Articles/Surveys

Consumer Trends/News

- Digitas' Proprietary Study "Affluence in America: the New Consumer Landscape" Reveals the New Wave of Affluence in America
- Print Readership Still High Among Affluents Overall
- Post-Recession, the Rich Are Different - WSJ.com

Travel Trends/News

- Luxury Brands Thrive as the Economy Strengthens - Hospitality & Tourism Industry Report Q1-11, iPerceptions
- Three Times More People View TripAdvisor Reviews on Sites Other Than TripAdvisor
- Tourism Offices Under Scrutiny as States Cope With Budget Cuts
- One in Five Hotel Searches Come from Mobile Devices

International Trends/News

- Foreign Visitors Spent $134.4 Billion "Experiencing" the United States in 2010, or Nearly 12 Percent More Than the $120.3 Billion They Spent the Year Before, the US Department of Commerce
- Travel Sector Eyes China, India, Brazil for Boom

Group/Business Trends/News

- Corporate Travel Buyers Expect to Pay More in 2011 - HotelNewsNow.com & ACTE Survey