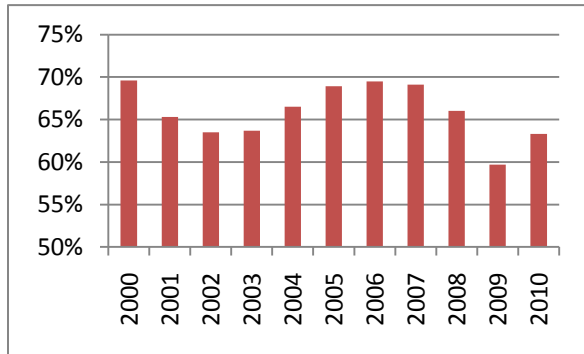


TOURISM INDUSTRY INDICATORS

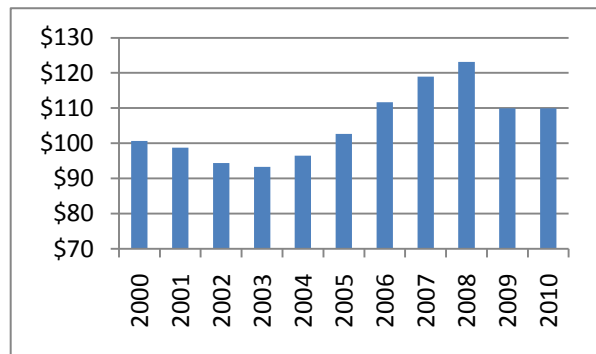
Detailed Lodging Tables

[Link to Data Charts](#)

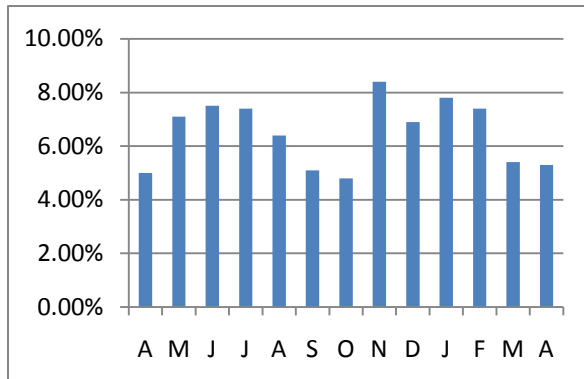
CA Occupancy: 2000-2010



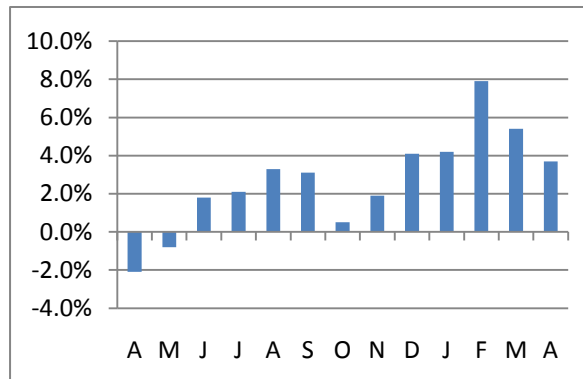
CA ADR: 2000-2010



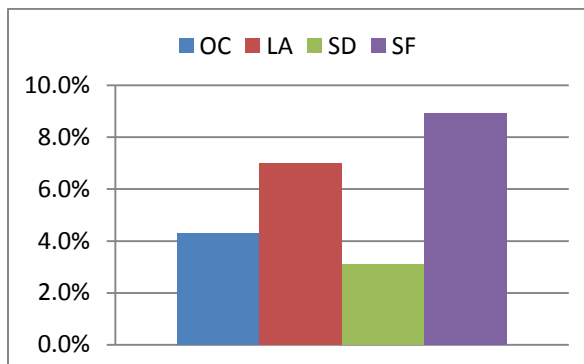
CA Occupancy Yr/Yr Chg: Last 12 Months



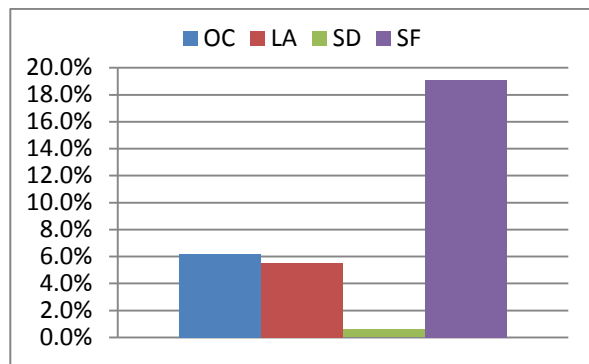
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: May 2011



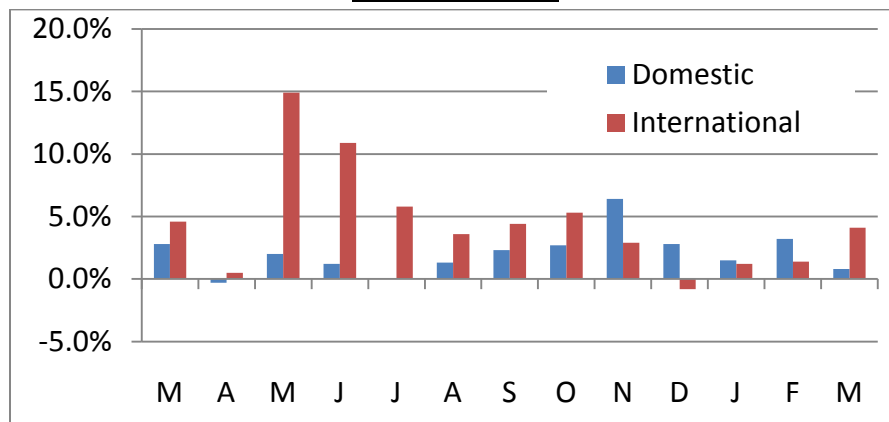
Preliminary CA ADR Yr/Yr Chg: May 2011



Source: Smith Travel Research

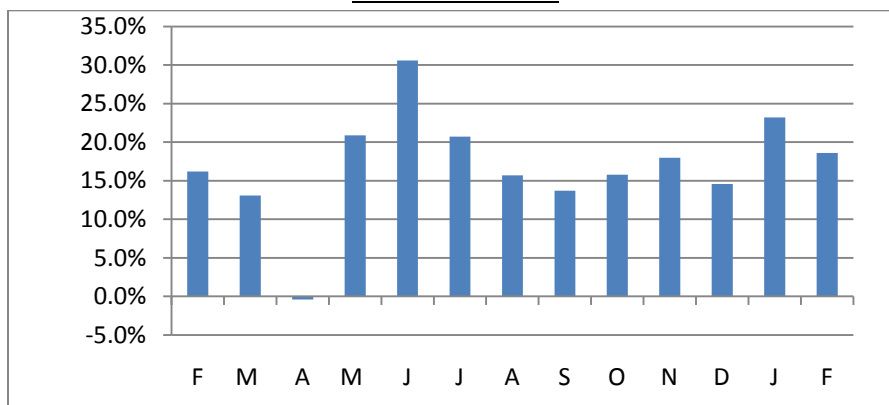
CA Airport Traffic Yr/Yr Chg: Last 12 Months

[Link to Data Charts](#)

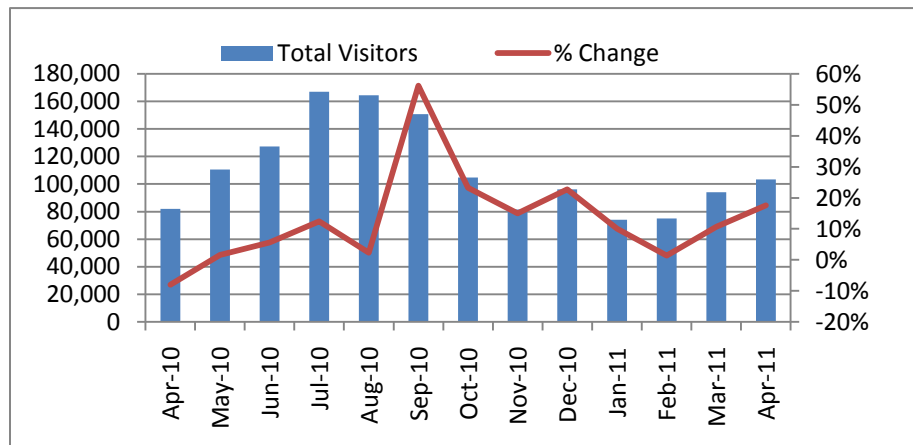


Overseas Arrivals Yr/Yr Chg: Last 12 Months

[Link to Data Charts](#)



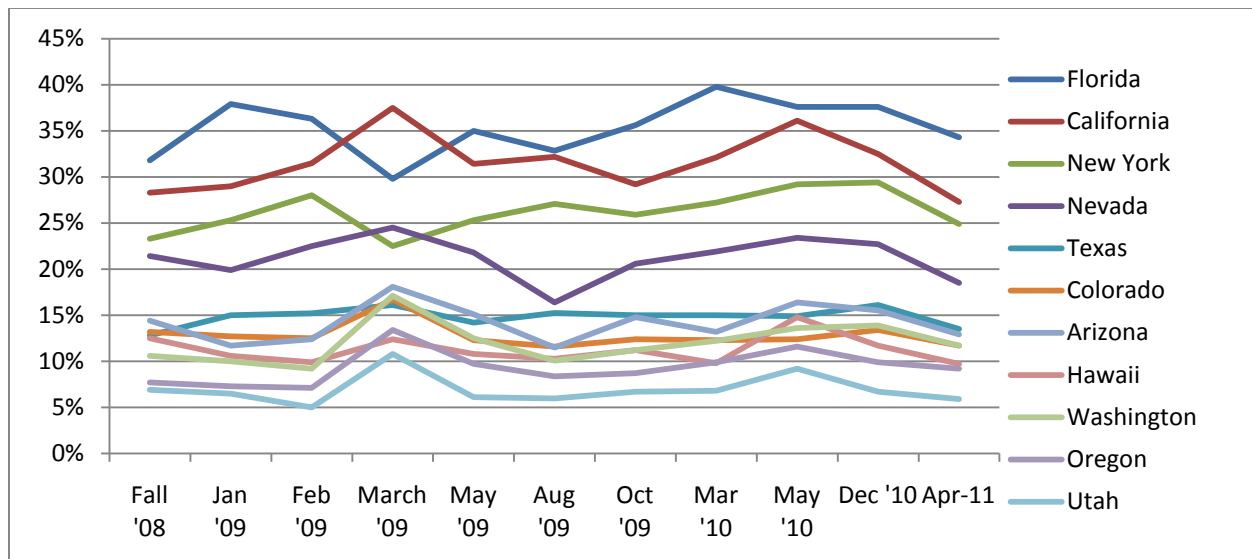
California Welcome Centers: Volume and Yr/Yr Change



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 S1																
Change in Bookings	4th Qtr 2010				Year-End 2010				1st Qtr 2011 (P)				2nd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 1-3%	80%	0%	20%	Up 4-9%	90%	0%	10%	AS	50%	20%	30%	AS	50%	10%	40%
California	Up 1-3%	70%	20%	10%	Up 1-3%	80%	10%	10%	AS	50%	20%	30%	AS	50%	20%	30%

United Kingdom Travel Trade Barometer 2011 S1																
Change in Bookings	4th Qtr 2010				Year End 2010				1st Qtr 2011 (P)				2nd Qtr 2011 (P)			
	AVE	↑	NC	↓	AVE	↑	NC	↓	AVE	↑	NC	↓	AVE	↑	NC	↓
U.S.	Down 1-3%	13%	19%	69%	Down 1-3%	25%	38%	38%	AS	25%	42%	33%	AS	50%	42%	8%
California	NC	44%	13%	38%	Up 1-3%	69%	13%	13%	AS	25%	58%	17%	Higher	67%	25%	8%

Japan Travel Trade Barometer 2011 S1 R7																
Change in Bookings	4th Qtr 2010				Year End 2010				1st Qtr 2011 (P)				2nd Qtr 2011 (P)			
	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓
U.S. Mainland	up 1% to 3%	69%	13%	19%	up 4% to 9%	69%	13%	19%	AS	53%	29%	18%	Higher	73%	27%	0%
California	up 4% to 9%	82%	6%	12%	up 4% to 9%	77%	6%	18%	AS	65%	18%	18%	Higher	71%	24%	6%

Germany Travel Trade Barometer 2011 S1																
	4th Qtr 2010				Year End 2010				1st Qtr 2011 (P)				2nd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	NC	44%	44%	11%	Up 4-9%	78%	22%	0%	AS	22%	67%	11%	Higher	78%	22%	0%
California	Up 1-3%	56%	44%	0%	Up 1-3%	78%	11%	11%	AS	22%	67%	11%	Higher	78%	22%	0%

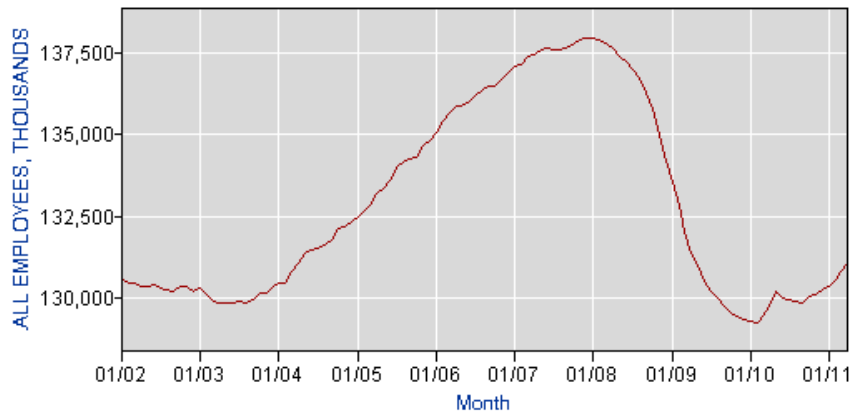
Mexico Travel Trade Barometer 2011 S1																
Change in Bookings	4th Qtr 2010				Year-End 2010				1st Qtr 2011 (P)				2nd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	down 4-9%	0%	0%	100%	up 4-9%	100%	0%	0%	AS	29%	57%	14%	Higher	86%	14%	0%
California	down 1-3%	14%	14%	71%	up 10-15%	100%	0%	0%	Higher	71%	14%	14%	Higher	100%	0%	0%

Note: Respondents include members of wholesale and retail travel companies, airlines, tour operators, travel agents and publishers and marketing and promotion companies

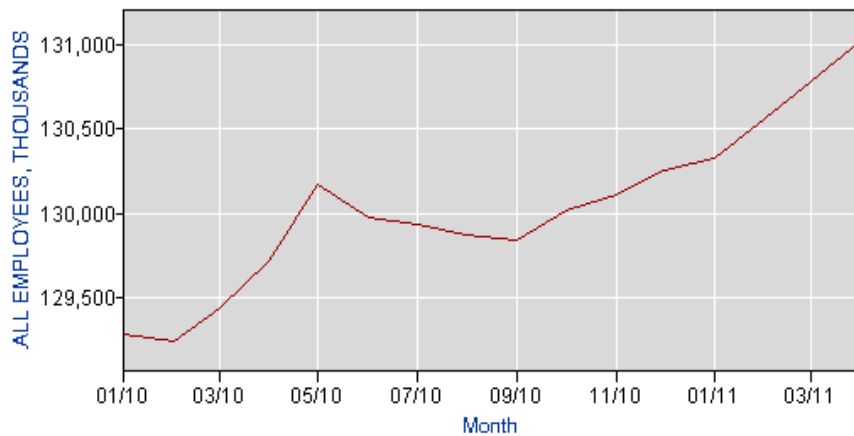
Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: DOMESTIC

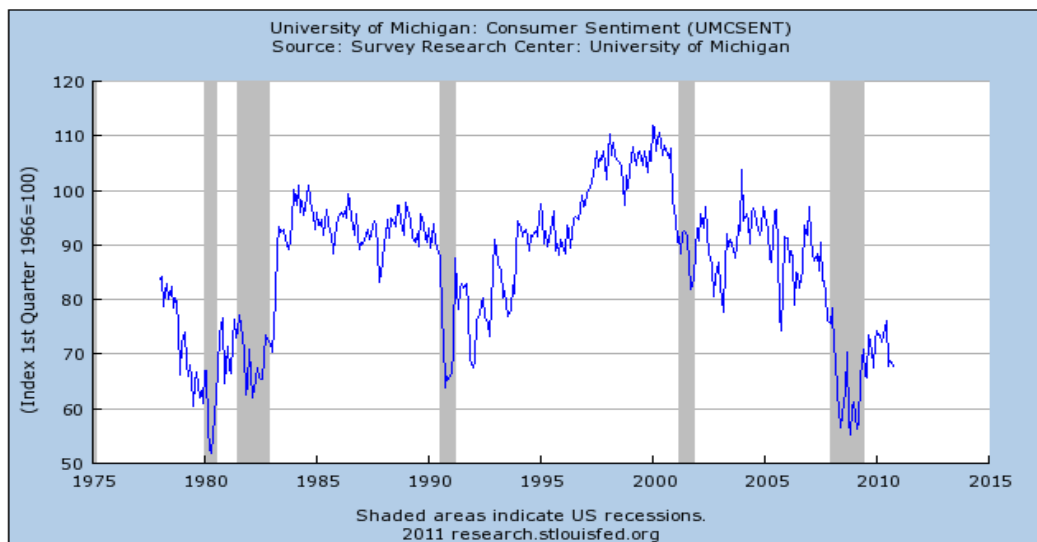
US Work Force: 2002-present



US Work Force: 2010-present

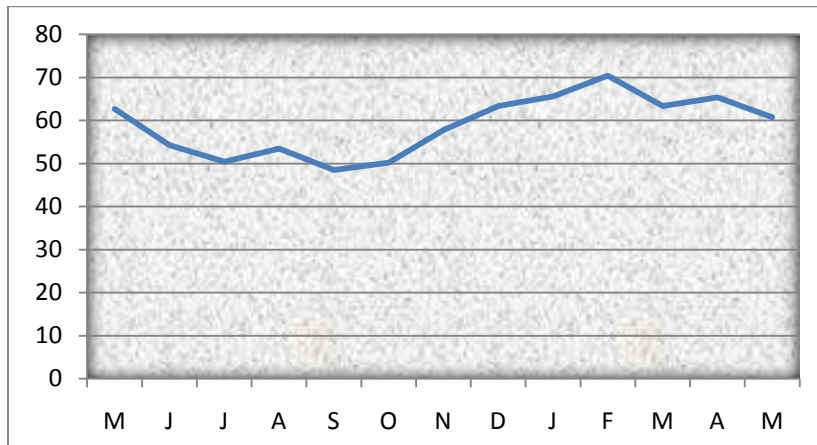


US Consumer Confidence: 1978-present



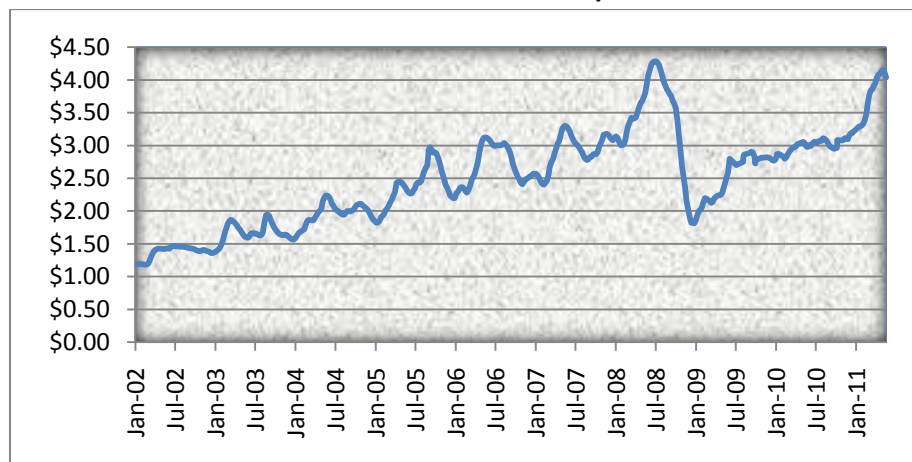
Sources: Bureau of Labor Statistics; Survey Research Center: University of Michigan

US Consumer Confidence Last 12 Months

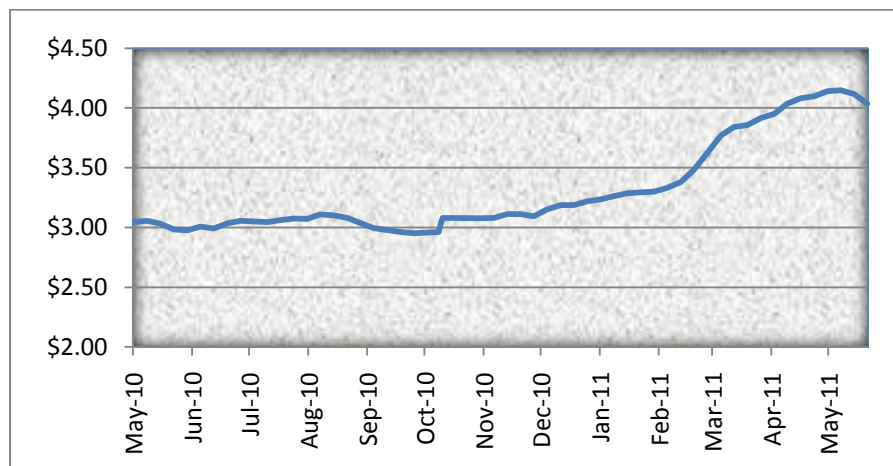


Note: Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present

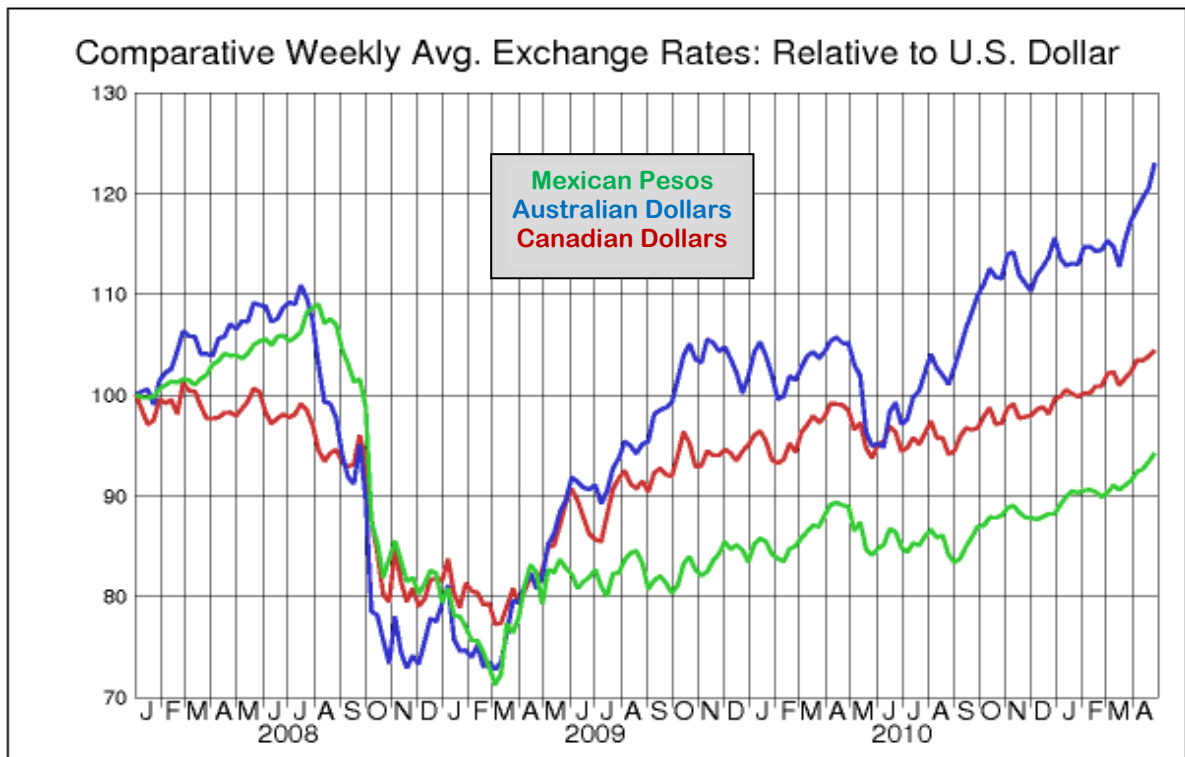
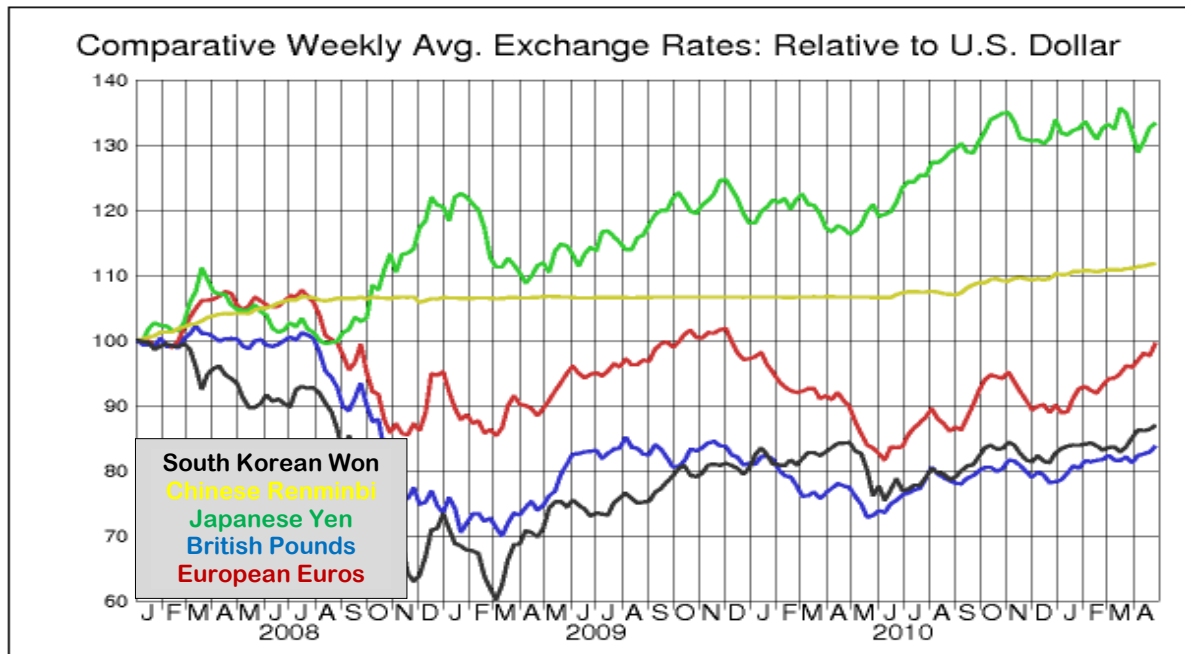


West Coast Gas Prices: Last 12 Months



Sources: The Conference Board, Energy Information Administration

Exchange Rate
 Relative Change Since 2008



Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

International Non-Stop Flights and Seats
 Monthly Totals, California's Top Markets

Overseas May 2011	Australia	China	France	Germany	Japan	S. Korea	UK
Non-Stop Flights							
LAX	239	210	106	69	241	137	244
SFO	35	217	31	131	181	115	155
SAN	0	0	0	0	0	0	0
Total CA	274	427	137	200	422	252	399
Non-Stop Seats							
LAX	89,237	67,935	33,737	23,924	80,751	43,872	75,338
SFO	13,110	75,516	13,516	46,772	56,603	34,844	50,871
SAN	0	0	0	0	0	0	0
Total CA	102,347	143,451	47,253	70,696	137,354	78,716	126,209
Non-Stop Seats: Yr/Yr % Chg							
LAX	5%	25%	7%	-19%	4%	-1%	-3%
SFO	-24%	0%	0%	8%	-9%	30%	0%
SAN	na	na	na	na	na	na	na
Total CA	0%	10%	5%	-3%	-2%	11%	-2%

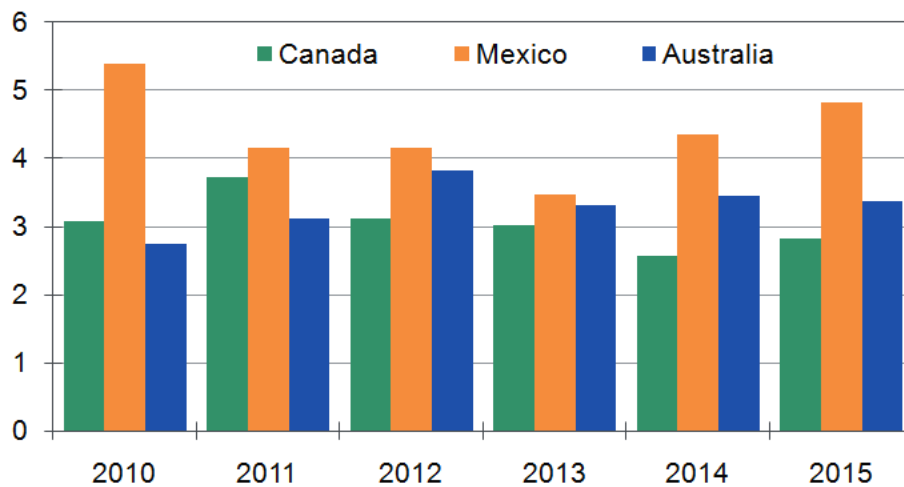
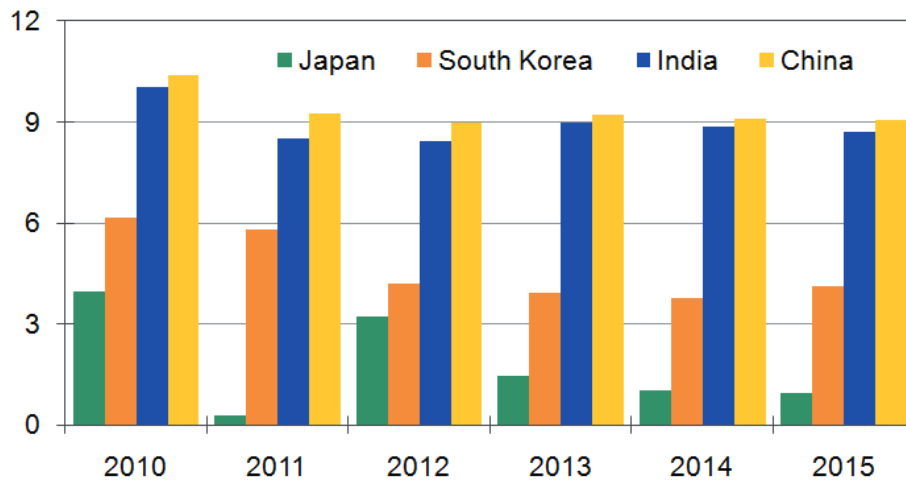
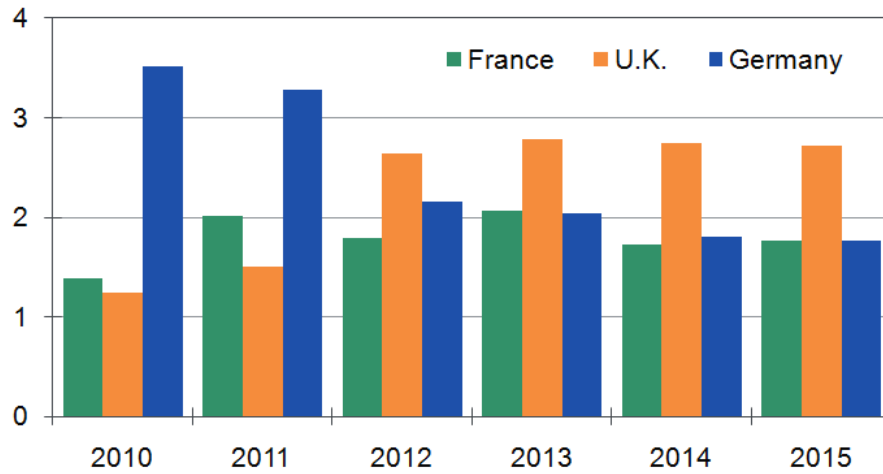
International May 2011	Canada			Mexico		
	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change	Non-Stop Flights	Non-Stop Seats	Non-Stop Seats: Yr/Yr % Change
FAT	0	0	na	62	7,936	113%
LAX	706	87,260	12%	1,037	138,344	-10%
OAK	0	0	na	88	11,616	54%
ONT	0	0	na	31	3,844	3844%
PSP	32	4,562	5%	0	0	0%
SAN	78	8,778	79%	44	6,795	17%
SFO	670	67,488	-2%	232	30,249	-19%
SJC	0	0	na	71	10,047	7%
SMF	0	0	na	13	2,041	-66%
SNA	30	4,080	48%	0	0	0%
Total CA	1,516	172,168	8%	1,578	210,872	-6%

Data as of May 31, 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



MAY TRAVEL/TOURISM NEWS & TRENDS

American Express Launches “Mystery” Trips Tied to Your Personality – USA TODAY

“...A travel personality quiz is just the start of American Express’ new [“NEXTPELITION” website](#). What you can do after determining what kind of traveler you are is get a consultation with a travel professional and a mystery trip with a destination revealed just days before you depart. Hotels, excursions and the like also are doled out in surprise fashion via a hand-held electronic device that travelers get before they go.

First, I took a 15-question quiz .The next step would be to consult with an AmEx expert about what kind of trip I wanted, which destinations I preferred or disliked, how much money I had to spend, etc. When that was determined, I would get a packing list followed by news of my first destination and be sent my smartphone-style electronic “travel console.” Details would slowly be revealed via the device -- such as where to lunch in Paris or being signed up for a two-hour gondolier course in Venice, rather than just riding in a gondola. Guidebook info also would be loaded. Prices start at \$1,000 a person, double, for a weeklong domestic trip, including air; \$2,500 for Europe.

An interesting concept, basically turning a trip planned by a travel agent into a mystery, and giving AmEx travel reps new customers...”

[Full Article](#)

May Articles/Surveys

Consumer Trends/News

- [7 in 10 Consumers Will Spend More for Good Service – The American Express Global Customer Service Barometer](#)
- [The New Digital American Family: Understanding Family Dynamics, Media and Purchasing Behavior Trends – Nielsen](#)

Travel Trends/News

- [Cornell Study Shows Promotion Effect of Online Travel Sites - Listings on Third-Party Sites Increase Bookings on a Hotel’s Own Website](#)
- [Meet the Millennials: Insights for Travel Destinations – Survey](#)

International Trends/News

- [Expedia Releases Market Data Showing Increase In International Consumer Demand For Travel Into San Francisco](#)

Group/Business Trends/News

- [Business Travel Hits Highest Levels Since Recession Began – The Business Travel Quarterly Outlook](#)