September 2011
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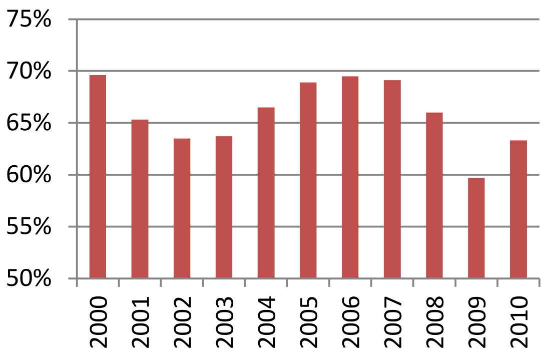
TOURISM INDUSTRY INDICATORS

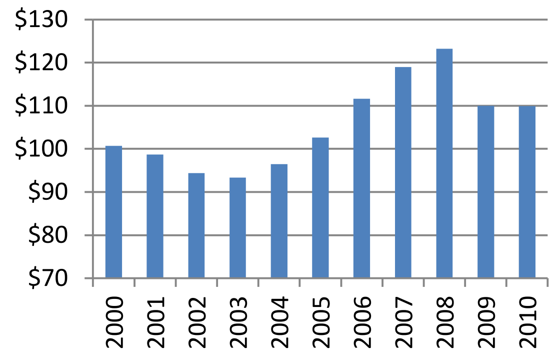
Detailed Lodging Tables

Link to Data Charts

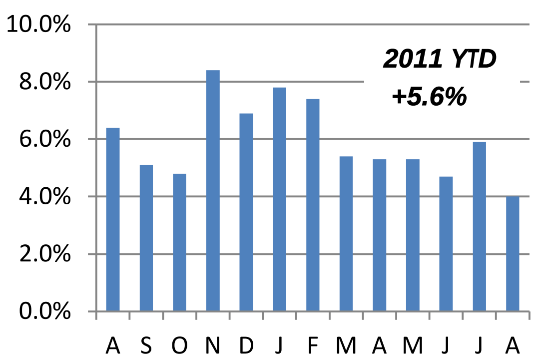
CA Occupancy: 2000-2010



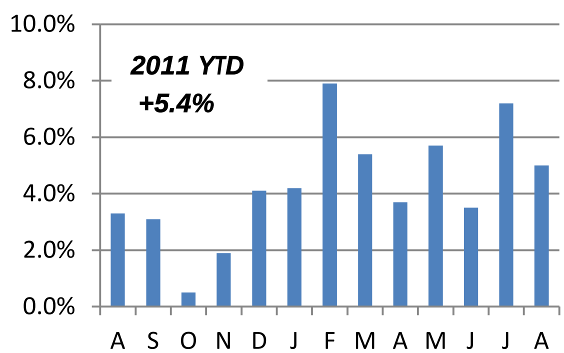
CA ADR: 2000-2010



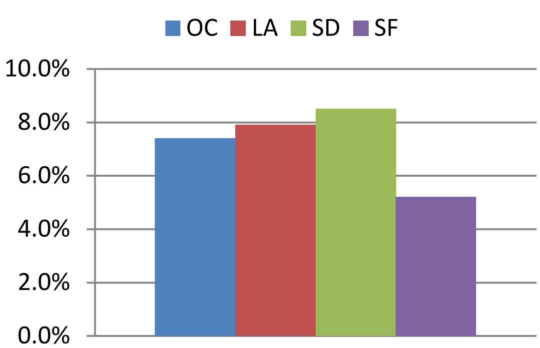
CA Occupancy Yr/Yr Chg: Last 12 Months



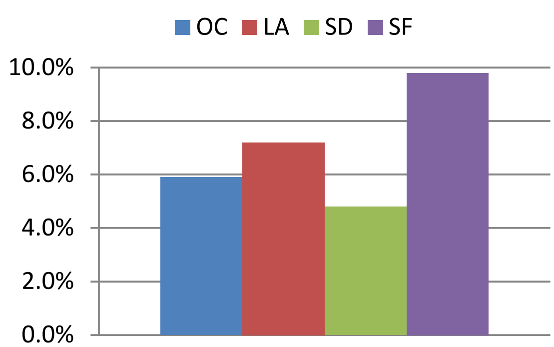
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: September 2011



Preliminary CA ADR Yr/Yr Chg: September 2011



Source: Smith Travel Research

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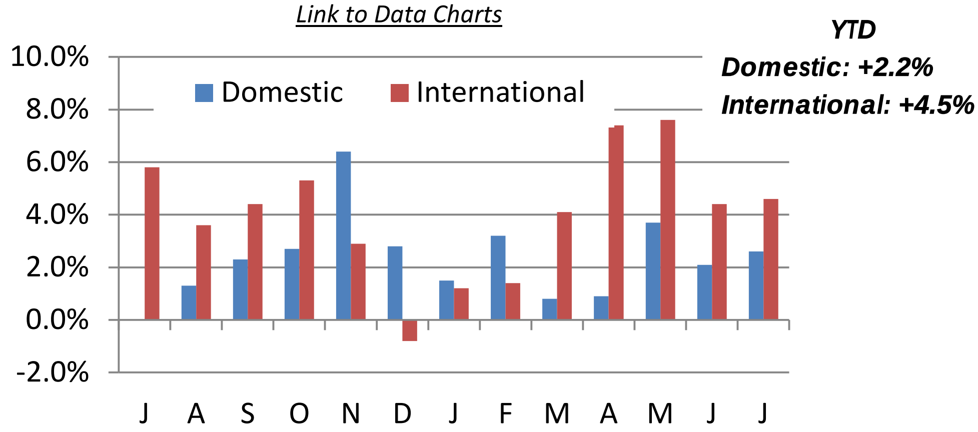
CA Airport Traffic Yr/Yr Chg: Last 12 Months

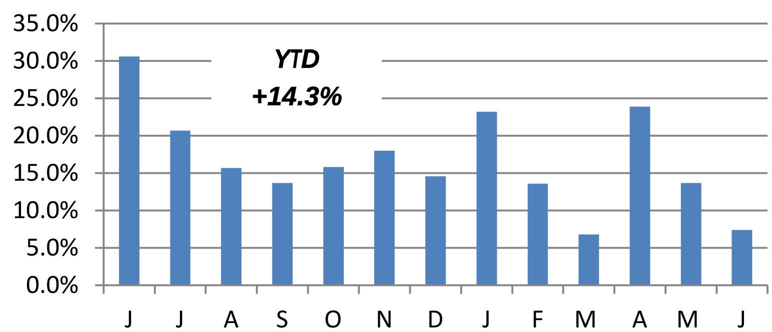
Link to Data Charts



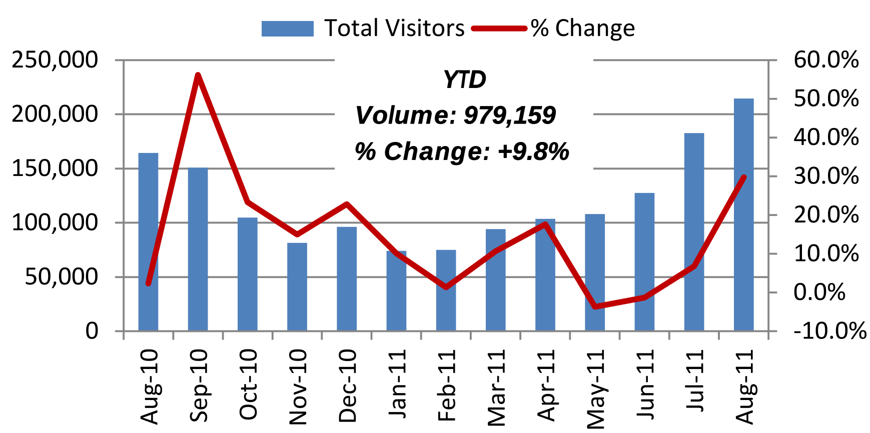
Note: Data from Long Beach and Oakland airports are not included.

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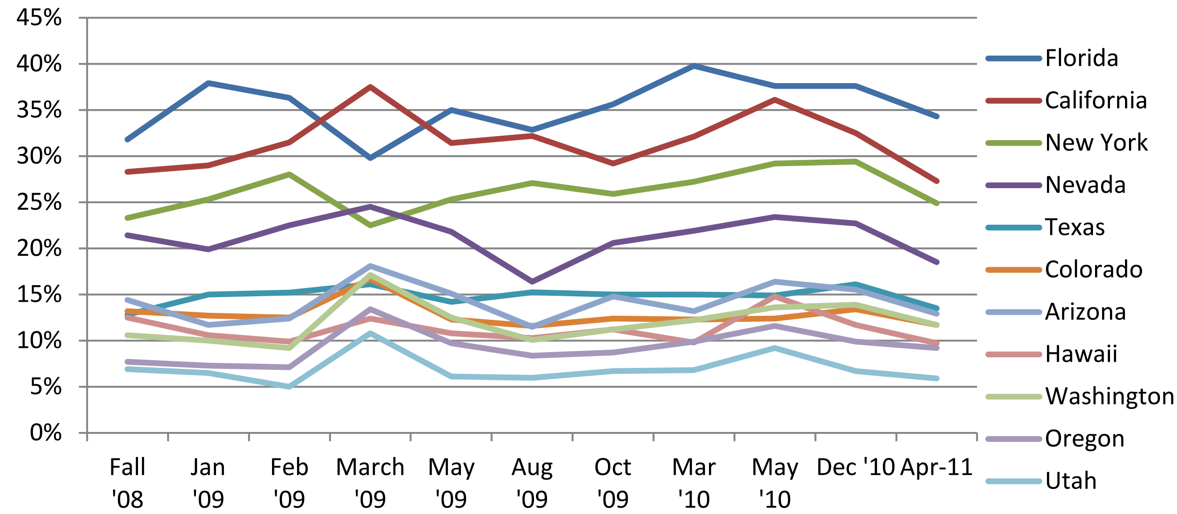
US Travelers: % Who Intend to Travel to Key States in Next 12 Months



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	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

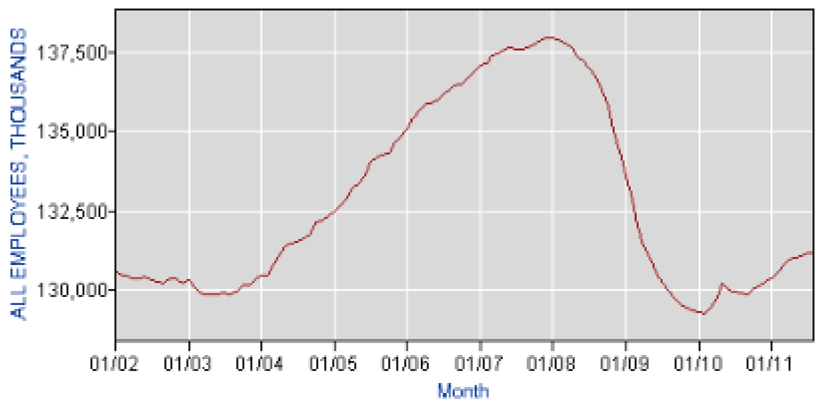
Change in Bookings	1st Qtr 2011				2nd Qtr 2011 (P)				3rd Qtr 2011 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S. including Hawai'i and Guam	Increased 10% to 15%	92%	0%	8%	Higher	96%	4%	0%	Higher	84%	12%	4%
U.S. Mainland only	Increased 10% to 15%	83%	13%	4%	Higher	88%	13%	0%	Higher	79%	17%	4%

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'.

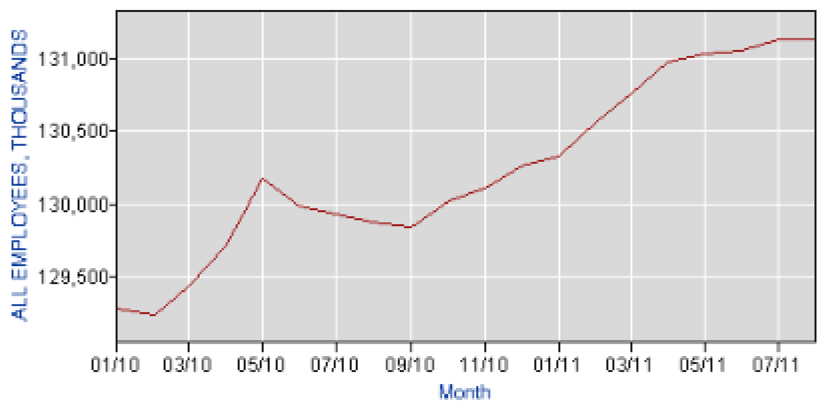
Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: *DOMESTIC*

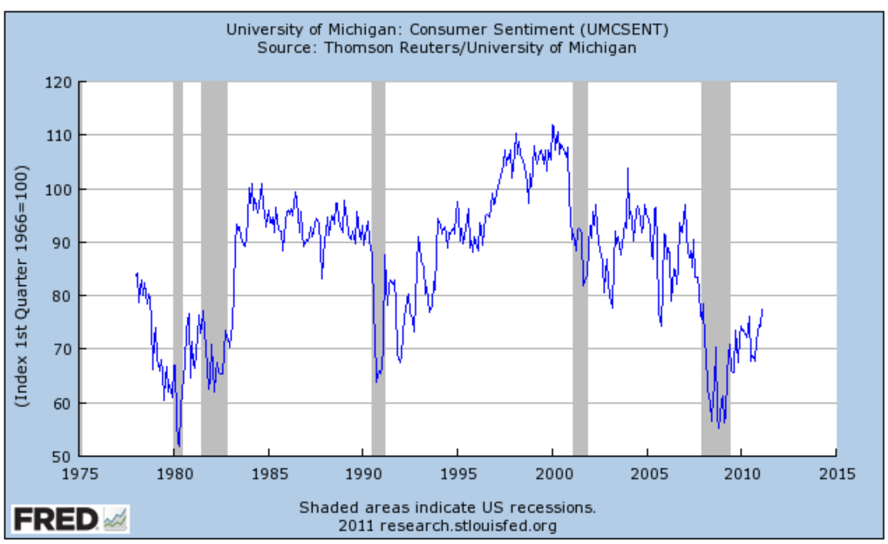
US Work Force: 2002-present



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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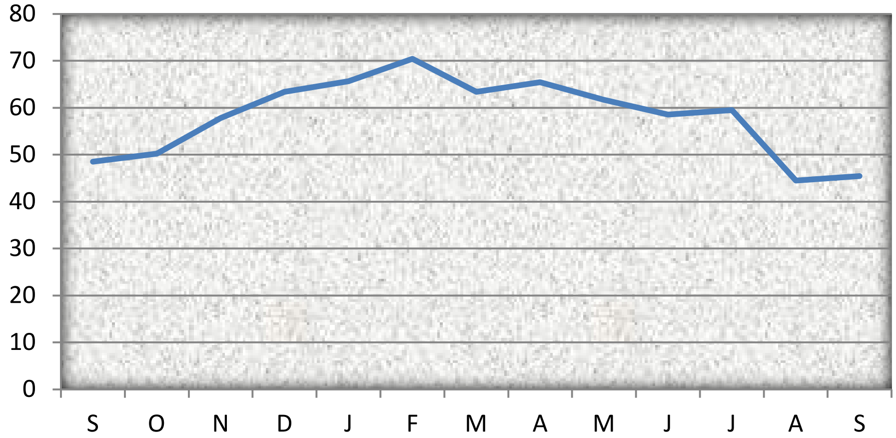
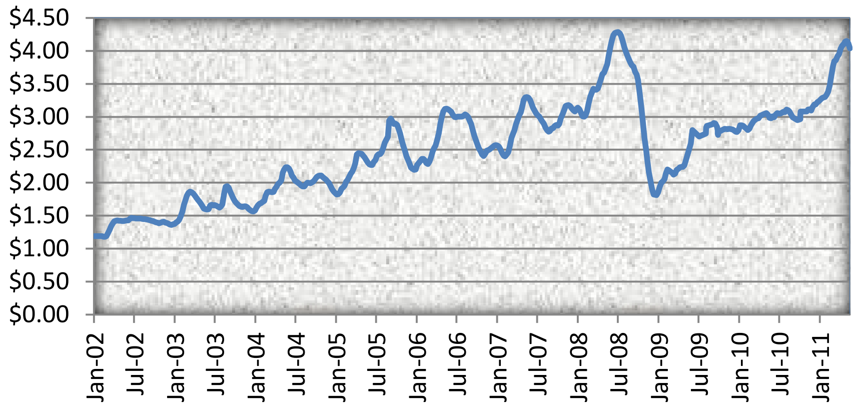
US Consumer Confidence Last 12 Months

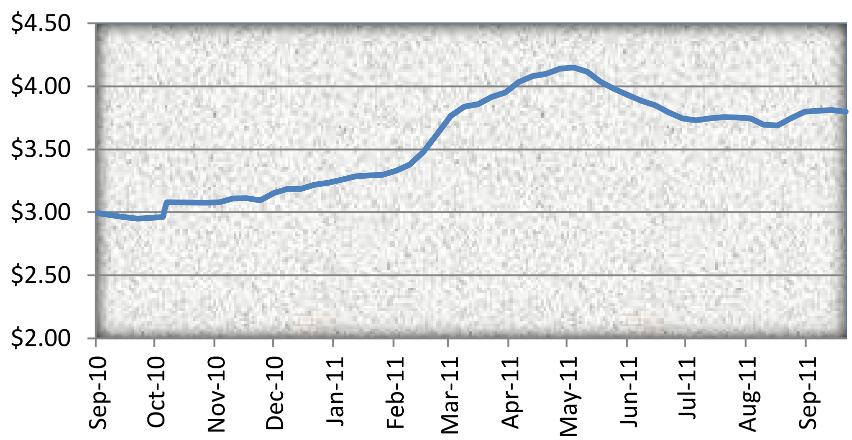


Note: Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



West Coast Gas Prices: Last 12 Months



Sources: The Conference Board, Energy Information Administration

September 2011
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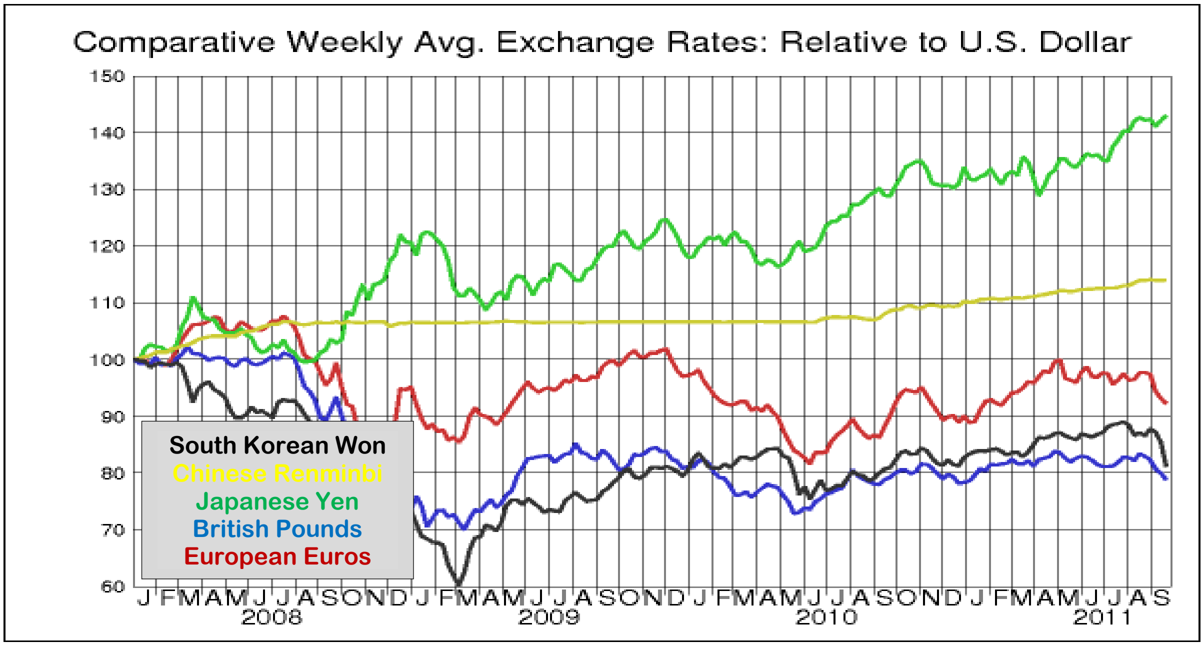
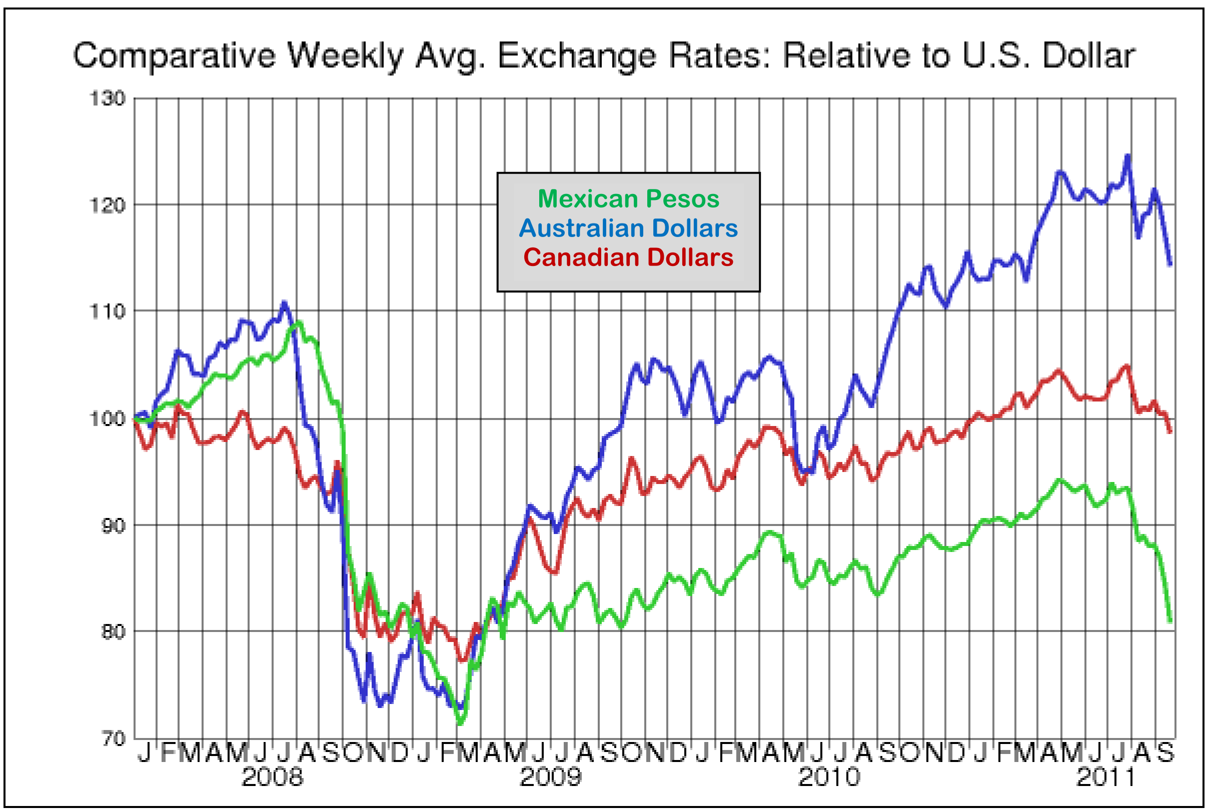
Exchange Rate

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, September 2011	Australia	China	France	Germany	Japan	S. Korea	UK
Non-Stop Flights							
LAX	235	253	104	105	270	161	240
SFO	30	210	43	131	179	119	150
SAN	0	0	0	0	0	0	30
Total CA	265	463	147	236	449	280	420
Non-Stop Seats							
LAX	86,546	80,924	31,642	36,960	89,535	48,487	74,066
SFO	11,220	73,890	15,474	47,820	56,424	35,887	6,780
SAN	0	0	0	0	0	0	49,230
Total CA	97,766	154,814	47,116	84,780	145,959	84,374	130,076
Non-Stop Seats: Yr/Yr % Chg							
LAX	7%	53%	-2%	5%	28%	13%	-2%
SFO	-33%	0%	14%	11%	-4%	10%	-86%
SAN	na	na	na	na	na	na	100%
Total CA	0%	22%	3%	9%	13%	12%	4%

International Air Service into California, September 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**	57	7442	**100%**
LAX	720	90525	**3%**	861	114833	**22%**
OAK	0	0	**na**	70	9310	**19%**
ONT	0	0	**na**	30	3746	**100%**
PSP	13	1768	**-41%**	0	0	**na**
SAN	81	9246	**17%**	83	11759	**150%**
SFO	669	70830	**-11%**	226	31624	**78%**
SJC	0	0	**na**	68	9512	**138%**
SMF	0	0	**na**	40	5415	**100%**
SNA	60	8160	**134%**	0	0	**na**
Total CA	1543	180529	**-1%**	1435	193641	**50%**

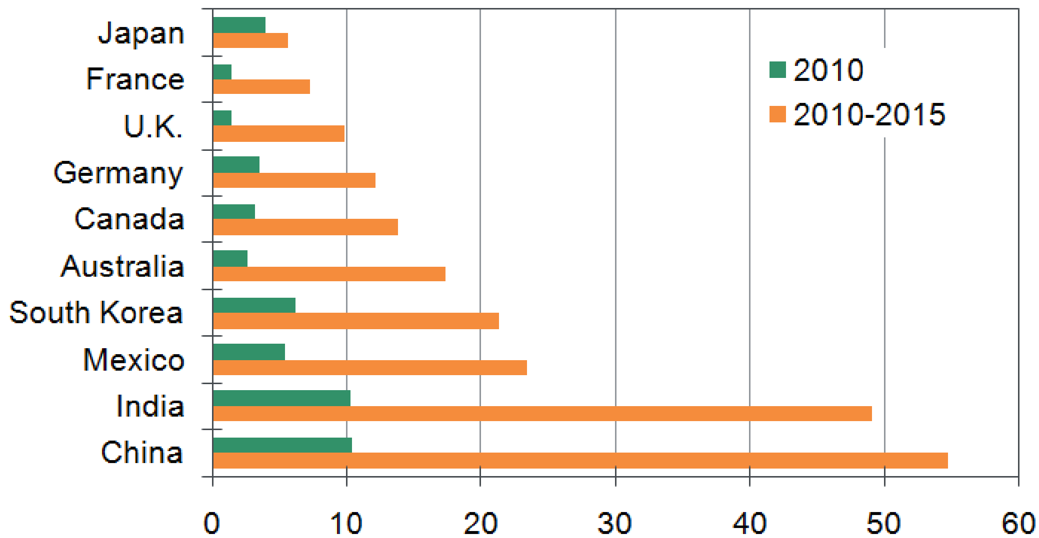
Data as of September 28, 2011

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, 2010-2015(f)



Sources: Moody's Economy.com, September 2011

MeringCarson

SEPTEMBER TRAVEL/TOURISM NEWS & TRENDS

Featured Article:

Affluent Consumers in a Digital World (IAB/Ipsos Mendelsohn)

Who are the affluent Americans? They are the 21% of U.S. households that have a minimum $100,000 annual income or the top fifth of the country. They represent 70% of U.S. consumer wealth.

The study indicates that with digital media, the conventional wisdom about affluents and media use is turned completely upside-down.

Specifically, the research reveals:

- Generally the hardest to reach consumers via traditional media such TV and radio, affluents are the heaviest users of digital media, far outpacing non-affluents in Internet use.
- Digital advertising is essentially ubiquitous and most consumers – affluent and otherwise – recall seeing 15-20 digital ads each week. Affluent consumers view and recall more digital ads.
- Digital advertising is widely accepted by modern consumers with widespread understanding of the ad-supported free content model and a clear preference for ad-supported free content over paying for ad-free content.
- Affluents prefer relevant advertising and are more likely than the general population to share personal information in exchange for a personalized online experience.
- Affluents see their lives as intertwined with technology. They are more likely than the general population to own smart phones and the majority report ownership of a number of other digital devices.

Full Survey

September Articles/Surveys

Consumer Trends/News

- Consumer Sentiment Improves from August Nosedive The Consumer Reports Sentiment Index rose to 48.8, up from 43.4 in August 2011 and 44.1 in September 2010
- Gen Xers Are Online Media Kings Demo uses more TV, online video and visits more ecommerce sites - eMarketer

Travel Trends/News

- New Ypartnership Survey Reveals Key Leisure Travel Trends Travelers are more savvy and self reliant due to the recession and technology
- Readers of Hotel Reviews Have Higher Conversion Rates - PhoCusWright
- Planes, Boats and Automobiles: A Look at Online Preferences of U.S. Travelers – Nielsen
- One in Eight Claim Facebook Photos Inspire Them to Book A Destination

Group/Business Trends/News

- Tomorrow's Apps for Meetings