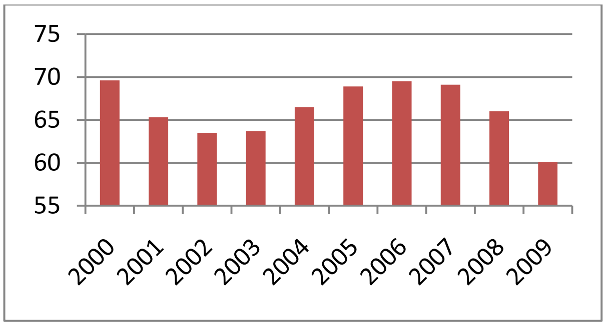
CTTC Tourism Monthly Tracking Dashboard

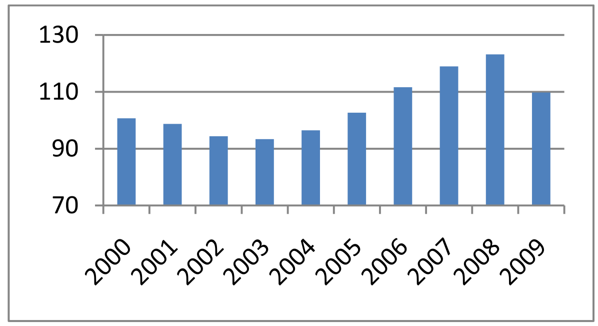
TOURISM INDUSTRY INDICATORS

[Detailed Lodging Tables (Jan. 2010)]

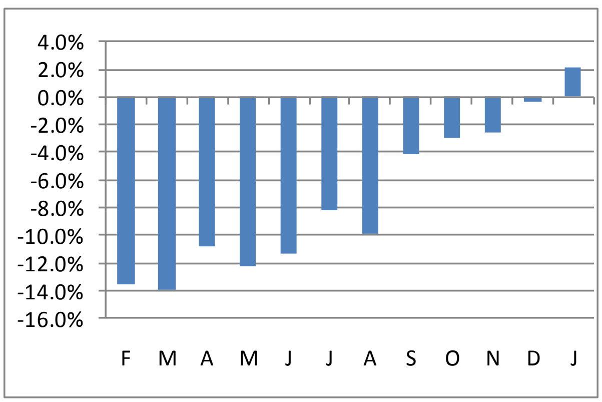
CA Occupancy: 2000-2008



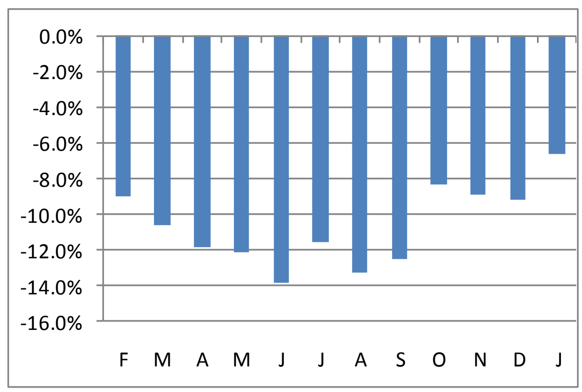
CA ADR: 2000-2008



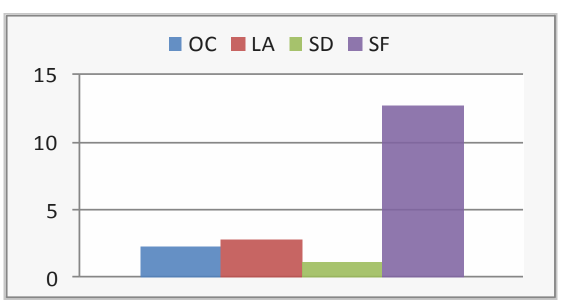
CA Occupancy Yr/Yr Chg: Last 12 Months



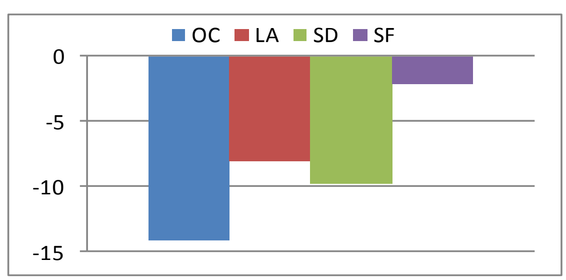
CA ADR Yr/Yr Chg: Last 12 Months



CA Occupancy Yr/Yr Chg: February 2010

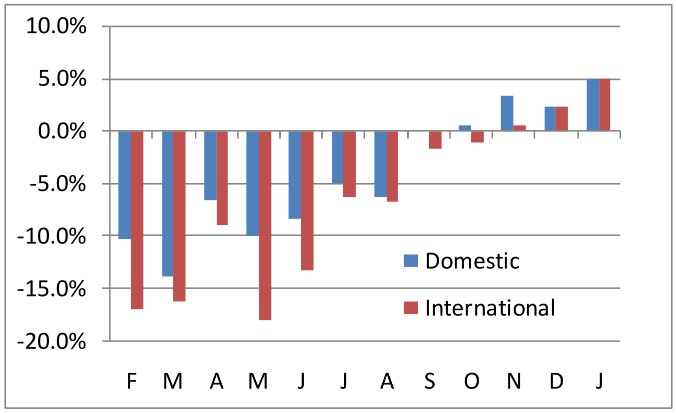


CA ADR Yr/Yr Chg: February 2010

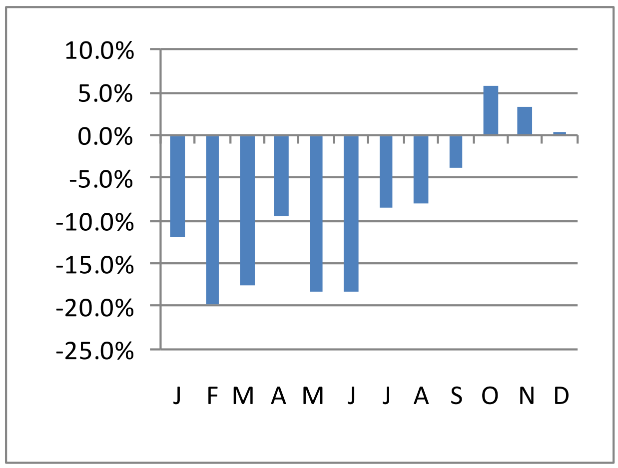


Source: Smith Travel Research

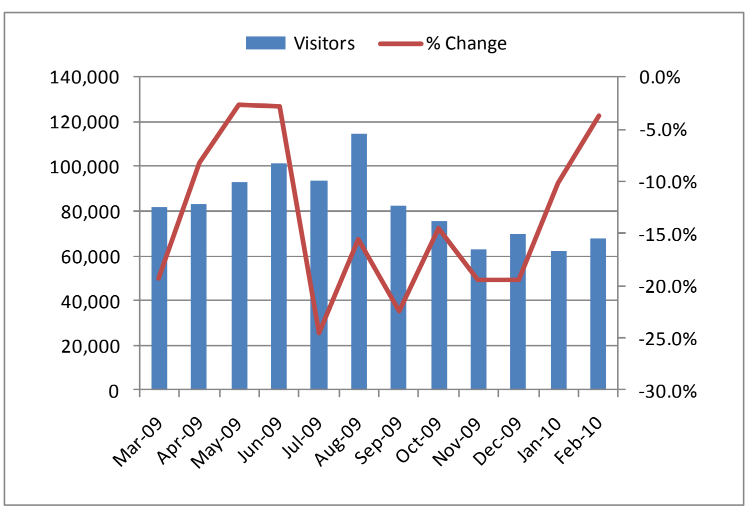
CA Airport Traffic Yr/Yr Chg: Last 12 months



Overseas Arrivals Yr/Yr Chg: Last 12 months



California Welcome Centers: Volume and Yr/Yr Change



Source: 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

State	Fall	Jan.	Feb.	March	May	Aug.	Oct.
Florida	32%	38%	36%	30%	35%	33%	37%
California	28%	29%	32%	38%	31%	32%	29%
New York	23%	25%	28%	23%	25%	27%	26%
Nevada	21%	20%	23%	25%	22%	16%	21%
Texas	13%	15%	15%	16%	14%	15%	14%
Colorado	13%	13%	13%	17%	12%	12%	14%
Arizona	14%	12%	12%	18%	15%	12%	15%
Hawaii	13%	11%	10%	12%	11%	10%	11%
Washington	11%	10%	9%	17%	13%	10%	11%
Oregon	8%	7%	7%	13%	10%	8%	9%
Utah	7%	7%	5%	11%	6%	6%	7%

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

Projected Travel	Spring	Fall	Jan.	Feb.	March	May	Aug.	Oct.
Primary	50%	45%	48%	49%	50%	52%	47%	47%
National	18%	20%	20%	23%	29%	21%	24%	21%
In-State	79%	71%	74%	75%	82%	78%	77%	72%

Projected Changes in US Traveler Behavior in Next 12 Months

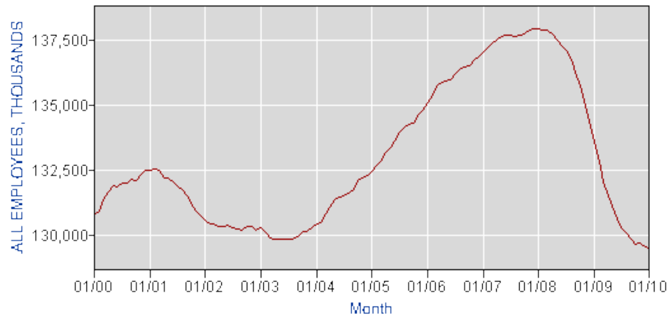
Activity	Jan.	Feb.	March	May	Aug.	Sept.
Will take fewer trips	25%	29%	21%	22%	17%	17%
Will choose closer destinations	14%	14%	21%	19%	17%	17%
Will take shorter trips	12%	13%	20%	20%	16%	16%
Spend less money on leisure travel	23%	23%	31%	28%	24%	24%
Stay with VFR vs. paid accommodations	22%	21%	24%	23%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

Source: Strategic Marketing & Research, Inc.

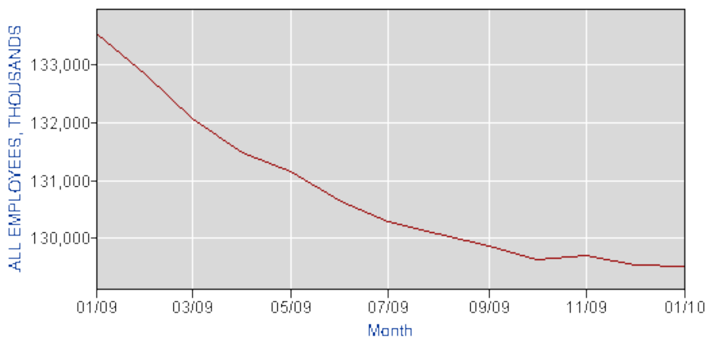
Note: US travelers surveyed have a HH income of $50,000+ and have traveled distances of 50 miles or more in the last year

ECONOMIC INDICATORS: *DOMESTIC*

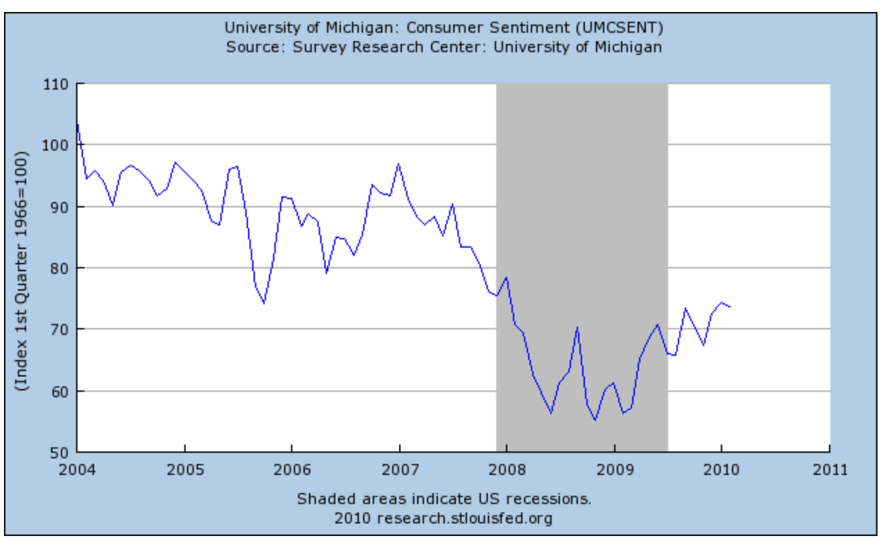
US Work Force: 2000 - present



US Work Force: Last 12 Months

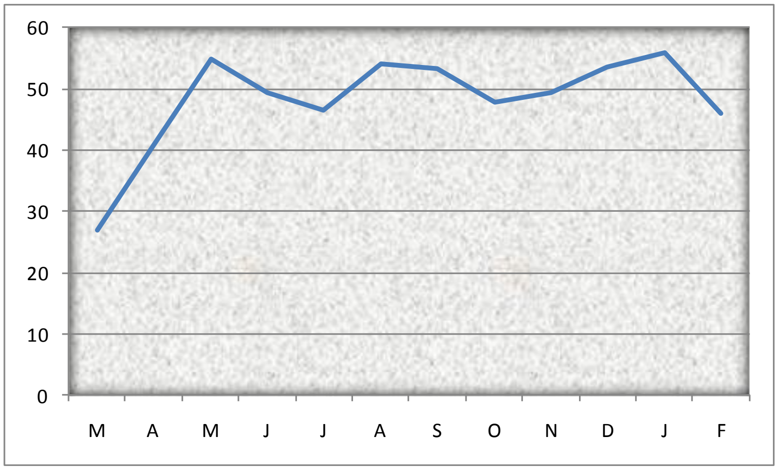


US Consumer Confidence: 2004 - present

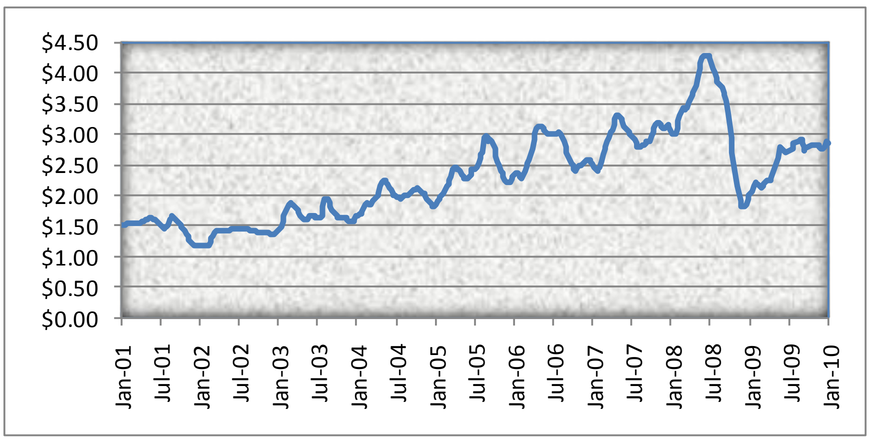


Sources: Bureau of Labor Statistics; Survey Research Center: University of Michigan

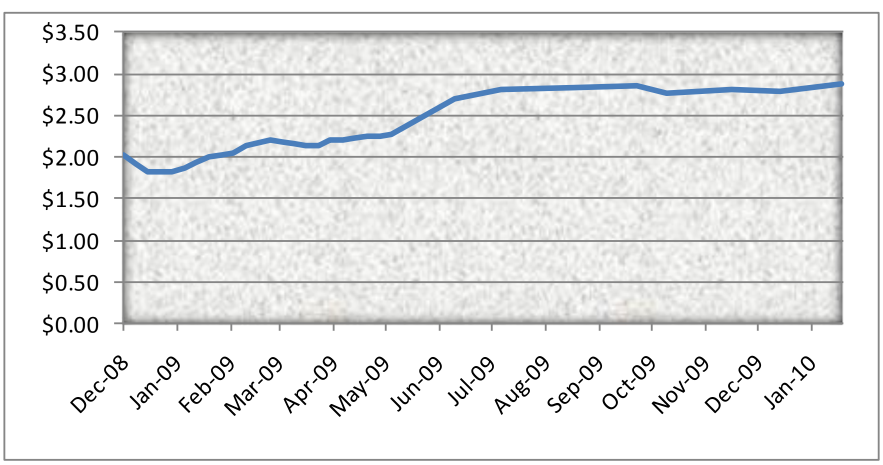
US Consumer Confidence Last 12 months



West Coast Gas Prices: 2001-present



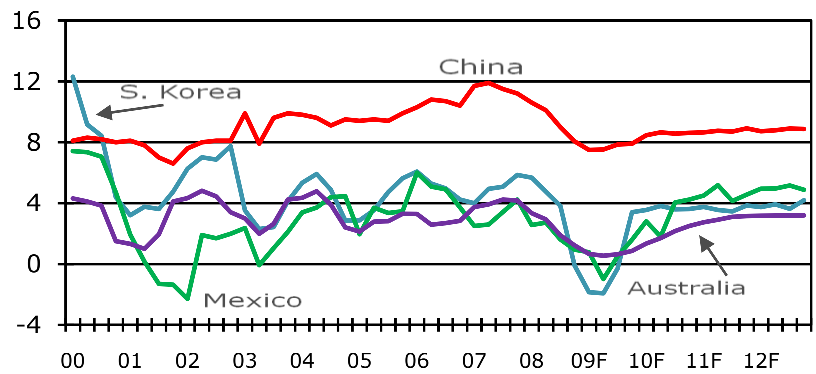
West Coast Gas Prices: Last 12 Months

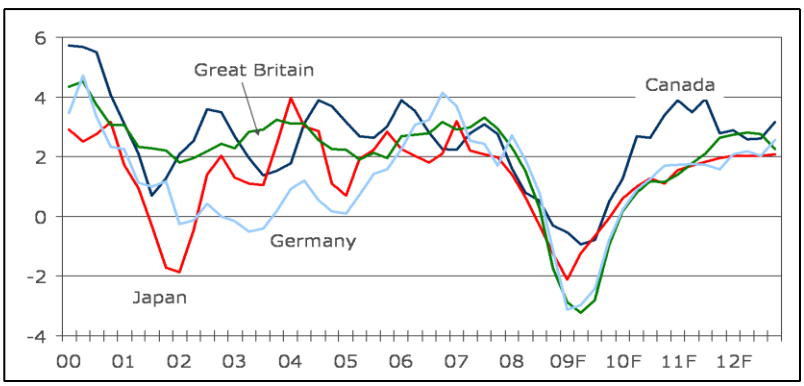


Sources: The Conference Board, Energy Information Administration

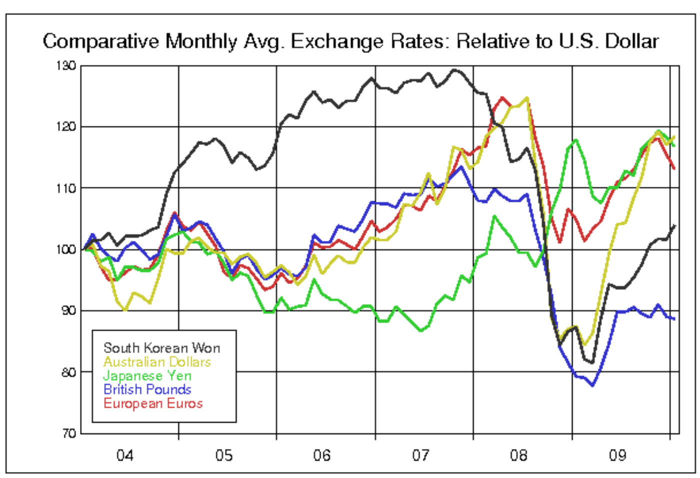
ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, Change: 2006- 2011(f)

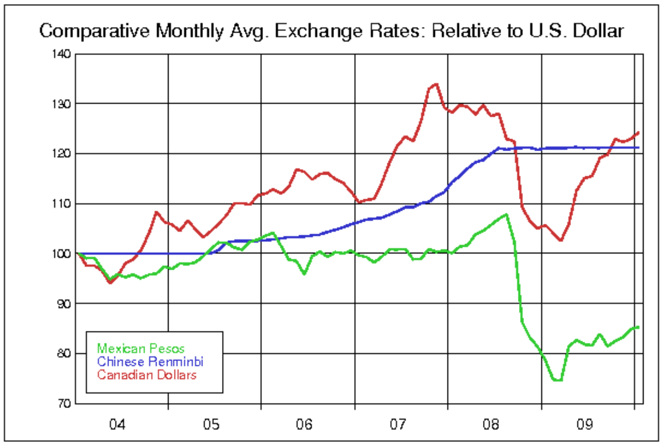




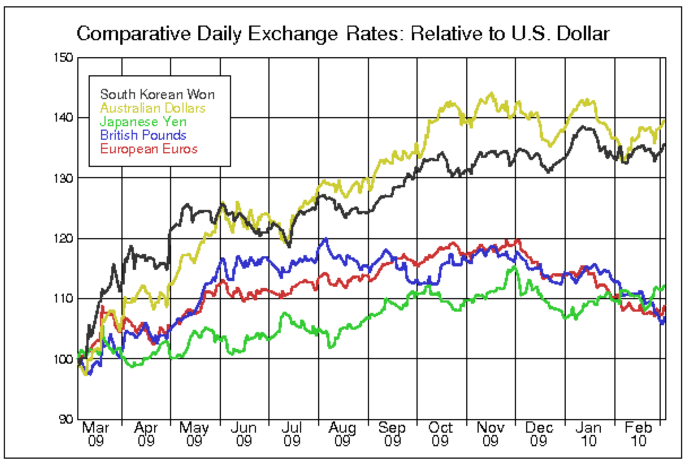
Exchange Rates: Relative Change since January 2004

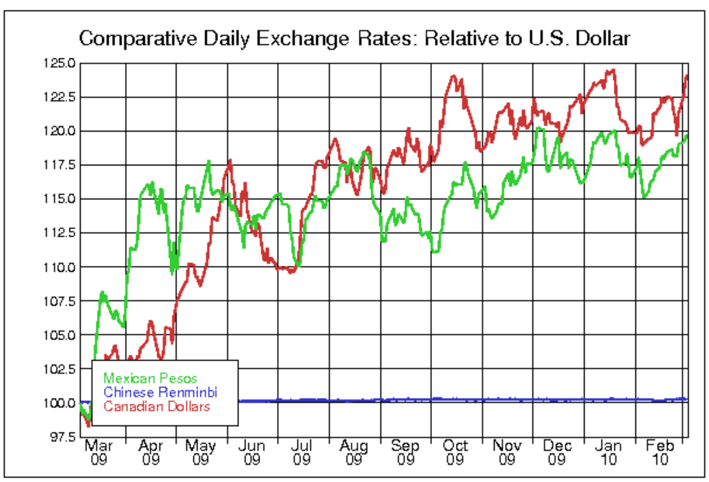


Exchange Rates: Relative Change since January 2004



Exchange Rates: Relative Change Last 12 Mos.





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, March 2010	Australia	Canada	China	Germany	Ireland	Japan	Mexico	New Zealand	Switz.	S. Korea	UK
Non-Stop Flights											
LAX	230	729	142	54	0	217	1,194	74	31	138	227
SFO	49	565	207	97	0	151	269	22	0	89	128
SAN	0	76	0	0	0	0	58	0	0	0	0
Total CA	**279**	**1,481**	**349**	**151**	**0**	**368**	**1,769**	**96**	**31**	**227**	**355**
Non-Stop Seats											
LAX	86,064	84,458	48,747	17,888	0	76,104	156,414	27,821	7,068	42,624	67,866
SFO	18,416	56,710	67,039	32,962	0	53,714	37,860	6,763	0	25,524	37,688
SAN	0	7,466	0	0	0	0	7,839	0	0	0	0
Total CA	**104,480**	**164,660**	**115,786**	**50,850**	**0**	**129,818**	**233,705**	**34,584**	**7,068**	**68,148**	**105,554**
Non-Stop Seats: Yr/Yr % Chg											
LAX	28%	6%	8%	2%	0%	-11%	-4%	-5%	11%	0%	-3%
SFO	-4%	3%	2%	2%	-100%	-14%	1%	-13%	0%	-14%	-22%
SAN	0%	221%	0%	0%	0%	0%	-10%	0%	0%	0%	0%
Total CA	**21%**	**9%**	**4%**	**2%**	**-100%**	**-12%**	**1%**	**-7%**	**11%**	**-6%**	**-11%**

Data as of March 8, 2010

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

Consumer Trends

3/8/10	**Reaching Affluents on Social Nets** "…Are affluents as receptive to social marketing as other Web users? Based on a study from Unity Marketing, the outlook is mixed. Most affluents use social networking sites to hear about their friends and family and reconnect with old friends—not to connect with brands. Just 7% logged on to look for offers or research purchases, while 6% went social to share or buy products or look for coupons. Affluents have a different relationship with brands on social networks: They like to check out fan pages but do not necessarily want to take the step of friending brands. The majority of affluent social networkers have viewed brand pages, but only one-quarter have become a follower or joined a group. Pam Danziger, president of Unity Marketing, advised luxury brands to maintain relationships in other ways and look to visits to fan pages rather than followers as measures of engagement…" Full Article

Travel Trends/News

2/25/10	**Are Brighter Days Ahead?** "…It's safe to say that just about every travel service enterprise is eager to hear some good news about what is likely to happen to demand in the months ahead. And the results of our February *travelhorizons*™ survey (co-authored every 90 days with the U.S. Travel Association) provide some encouragement, although I wouldn't retrieve the punch bowl just yet. According to the results of our February 2010 wave (a nationally representative sample of 2,251 U.S. households conducted February 4 – 12, 2010), 56% of U.S. adults expect to take at least one trip primarily for leisure purposes during the next six months, a 7-point decline from the percentage that expressed the same intention precisely one year prior. This expected incidence of leisure travel translates into an estimated 127 million U.S. adults who will take at least one leisure trip between February and July, 2010, half of whom expect no change in the amount of money they are likely to spend for leisure travel services this year versus last. One out of four (24%) expects to "spend more" on those trips, roughly the same percentage as those who expect to "spend less" (26%). Although stated leisure travel intentions are down, demand for leisure travel services remains elastic, thus travel service suppliers who develop and implement attractive promotional strategies will undoubtedly be rewarded for their creativity as consumers continue to demand excellent value for their travel dollars this summer…" Full Article

hospitality NET 3/02/10	**The Role of OTAs in the Travel Planning Process** Travel shoppers use online travel agencies (OTAs) more for research and comparison than booking. Although OTA market share is small, hotel listings on OTAs influence a much larger share of transactions. Hotels that are listed on OTAs see increased reservations on their own sales channels (call centers, booking engines, etc.)…" Video
amadeus 3/11/10	**The Amateur-Expert Traveler** "…The latest in the series of investigative reports by Amadeus, "The Amateur-Expert Traveler" combines interviews with 30 travel industry thought leaders together with a survey of almost 3,000 global travel experts to bring you the most comprehensive and up to date report on new travel trends and how the recession is impacting them. Key findings: The Amateur-Expert Traveler is much more knowledgeable about his or her destination and what to expect when they get there. Their expectations of service have diverged: they either expect a totally touchless online experience or they expect a very high level of personalized service. The Amateur-Expert Traveler is more adventurous about trying new destinations. Africa and Asia are more accessible and popular than ever. The North Americans and Northern Europeans who have traditionally dominated the travel industry will increasingly make way for Brazilian, Russian, Indian and Chinese tourists and business travelers.…" Full Article
BTN BUSINESS TRAVEL NEWS 3/8/10	**2010 U.S. Hotel Chain Survey** "…Starwood Hotels & Resorts' artsy Le Meridien brand this year by a hair ended JW Marriott's three-year reign atop the upper upscale tier in *Business Travel News'* 2010 U.S. Hotel Chain Survey, which tabulated ratings from 387 buyers. The upper upscale tier had the most varied and heated results, and other tiers saw a mix of familiar winners and newly emergent top brands. Among multi-brand hotel companies, InterContinental Hotels Group and Hilton Worldwide fared the best, with the former boasting at least a third-place finish in all eligible tiers and the latter garnering three of the top five upscale slots and nearly sweeping the mid-price tier with its Hampton brand. *Business Travel News'* U.S. Hotel Chain Survey annually measures corporate travel buyer opinions of the lodging brands they use. *BTN* e-mailed corporate readers responsible for hotel buying decisions, asking them to rate hotels, arranged by tier, with which they did business in the past year. Equation Research tabulated ratings from 387 respondents.…" Survey

International Travel Trends/News

Hotel Association of Canada Association des Hôtels du Canada 03/01/10	**2010 Canadian Travel Intentions Survey** "Twenty-two percent of travelers say they expect to take more trips to the United States in 2010 than 2009, and 12 percent say they would take less, similar to results from 2009 and 2008 HAC surveys. A potentially new and disturbing trend has emerged with almost 20 percent of Canadian travelers stating they went by car to a United States airport in 2009 to take a trip using less expensive airline tickets purchased for U.S. or foreign travel. "Deals in the United States that are not matched by Canadian air carriers are having an impact on 18 percent of the air travel business in Canada," says Pollard. "We'll be following this trend to see if it gets better or worse over the coming years. Lower fares from U.S. destinations hurt all of our businesses in Canada…" Full Article

Group/Business Travel Trends/News

ICCA Fast Future imex **3/5/10**	**'Hypercompetition' Shaping the Future of Meetings** Although they'll still be important 10 years from now, face-to-face meetings will be fewer, smaller and very, very competitive, according to phase-one findings from Convention 2020, a strategic forecast into the future of meetings and conventions. The findings show that in 2020: The quality of networking will be the single biggest factor influence meeting attendance, according to 76 percent of planners. • There will be more smaller, specialized meetings, according to 79 percent of planners. • Events will need to offer strong price-based incentives in order to attract attendees, according to 77 percent of planners. • Live video streaming, social networking and mobile event content will be the most popular forms of meeting technology, according to 75 percent, 70 percent and 64 percent of attendees, respectively. • Technology will help event organizers capture and analyze every activity, presentation and conversation at their meetings, according to 93 percent of planners. • Ethical and environmental factors will continue to influence meeting attendance, according to 70 percent of planners. • Venues at schools, universities and colleges will offer the most competition to convention centers, according to 63 percent of planners. Full Article Survey