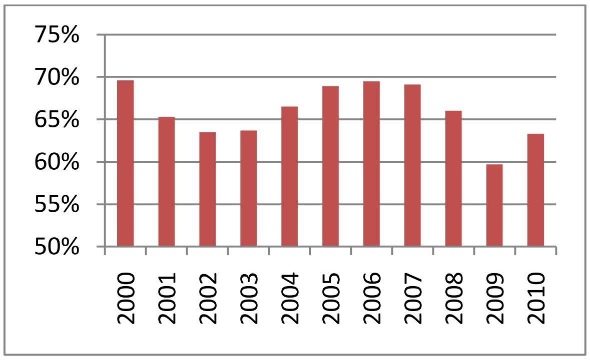
April 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

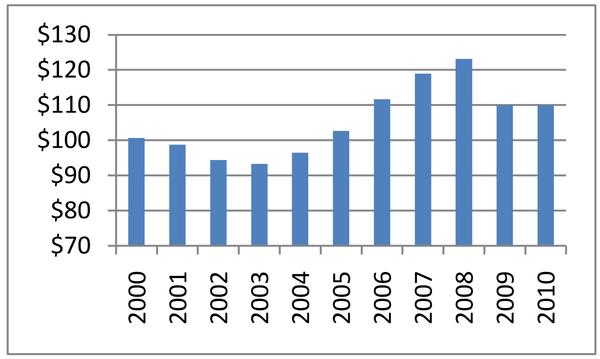
Detailed Lodging Tables

Link to Data Charts

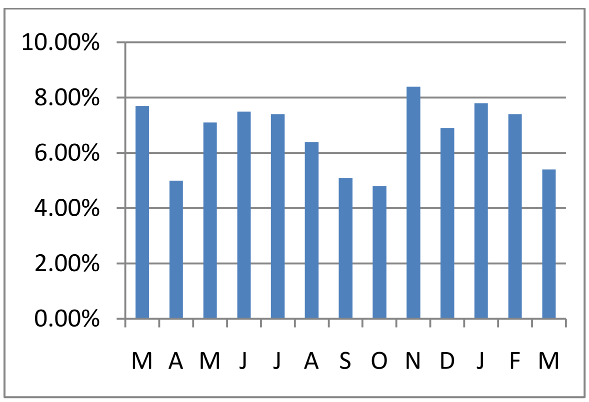
CA Occupancy: 2000-2010



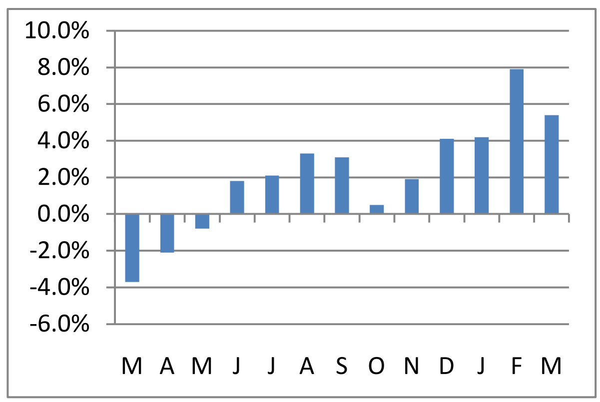
CA ADR: 2000-2010



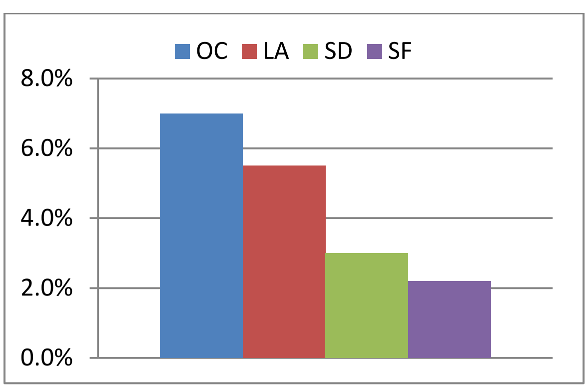
CA Occupancy Yr/Yr Chg: Last 12 Months



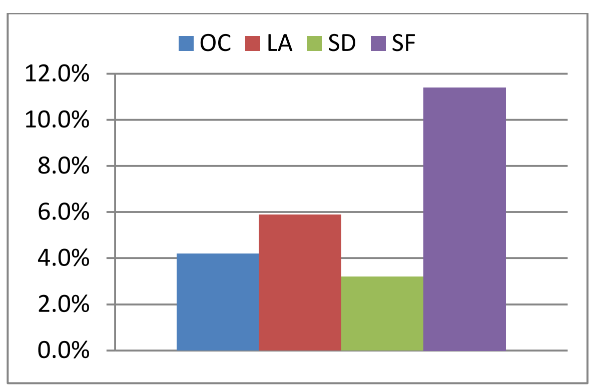
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: April 2011



Preliminary CA ADR Yr/Yr Chg: April 2011

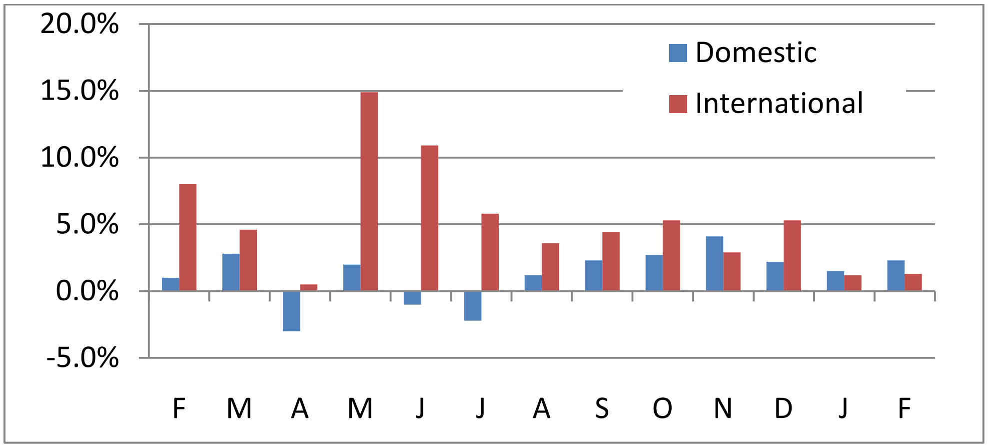


Source: Smith Travel Research

April 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

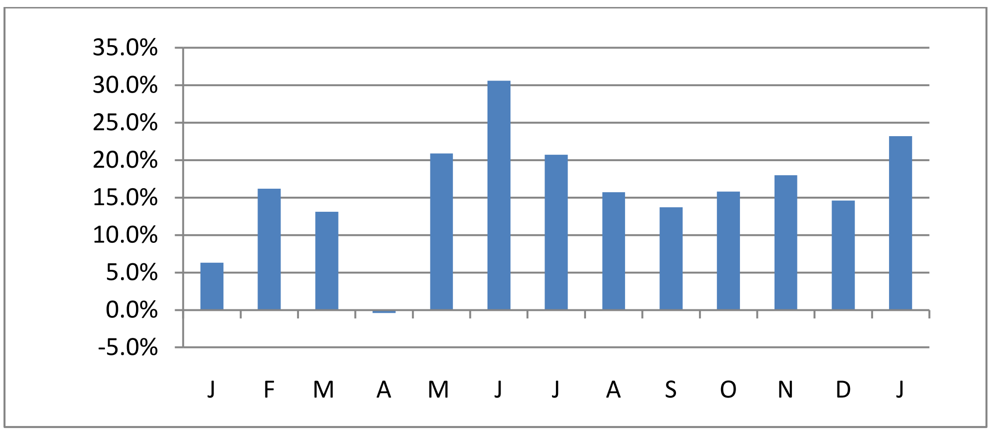
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

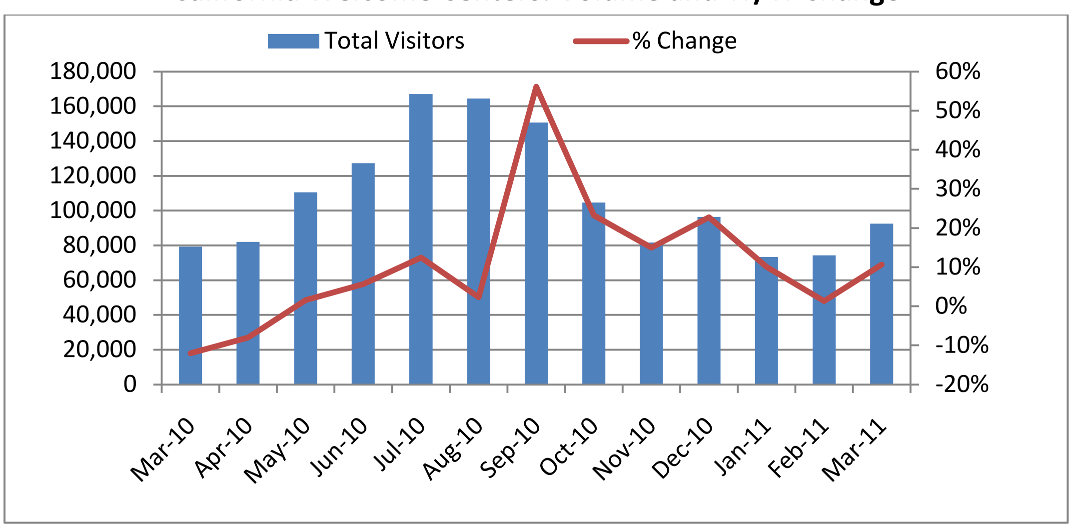


Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



California Welcome Centers: Volume and Yr/Yr Change

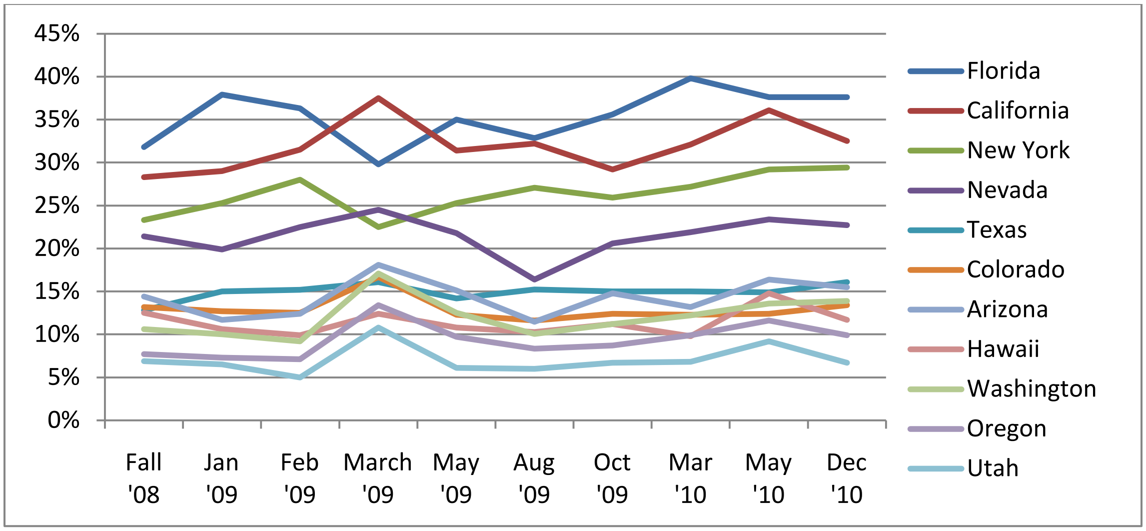


Note: Total volume is for all open California Welcome Centers; adjusted change is yr/yr comparison of only CWC's open both this and last year.

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

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

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

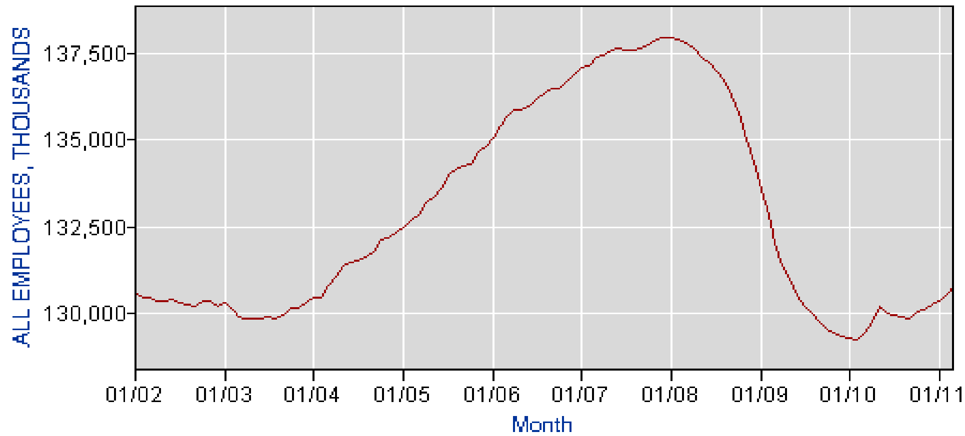
Note: The months listed are the months in which respondents were surveyed about travel intentions and behavior. US travelers surveyed have a HH income of $50,000+ and have traveled distances of 50 miles or more in the last year.

Sources: Strategic Marketing & Research, Inc., December 2010

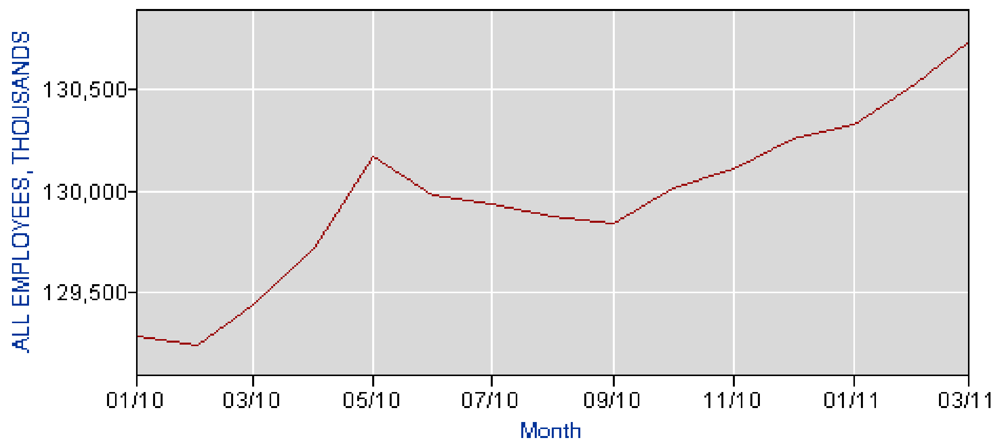
April 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

ECONOMIC INDICATORS: *DOMESTIC*

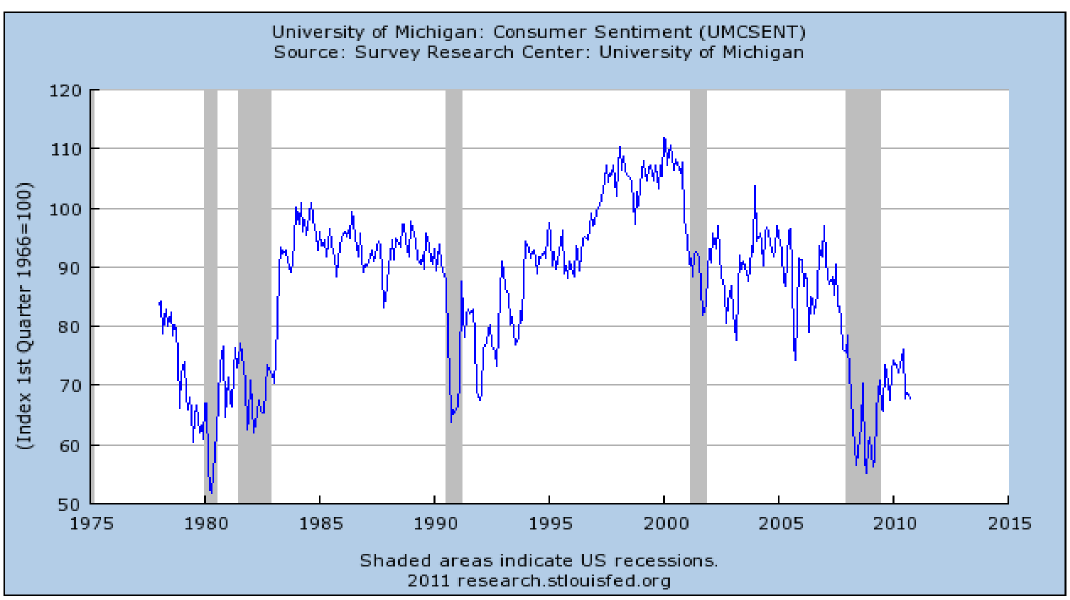
US Work Force: 2002-present



US Work Force: 2010-present



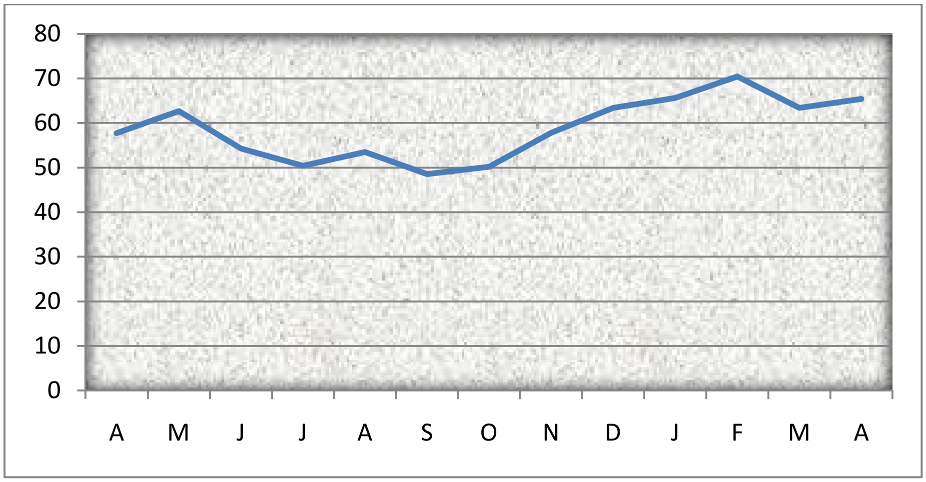
US Consumer Confidence: 1978-present



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

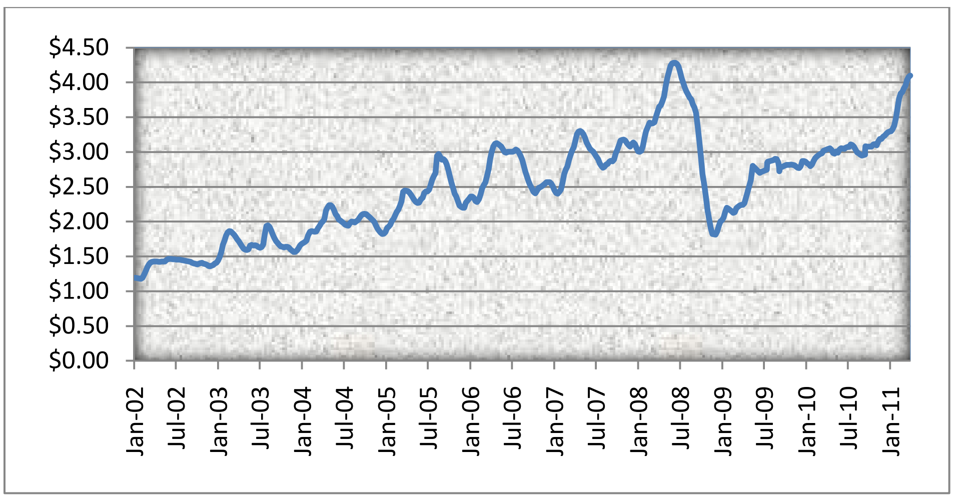
April 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

US Consumer Confidence Last 12 Months

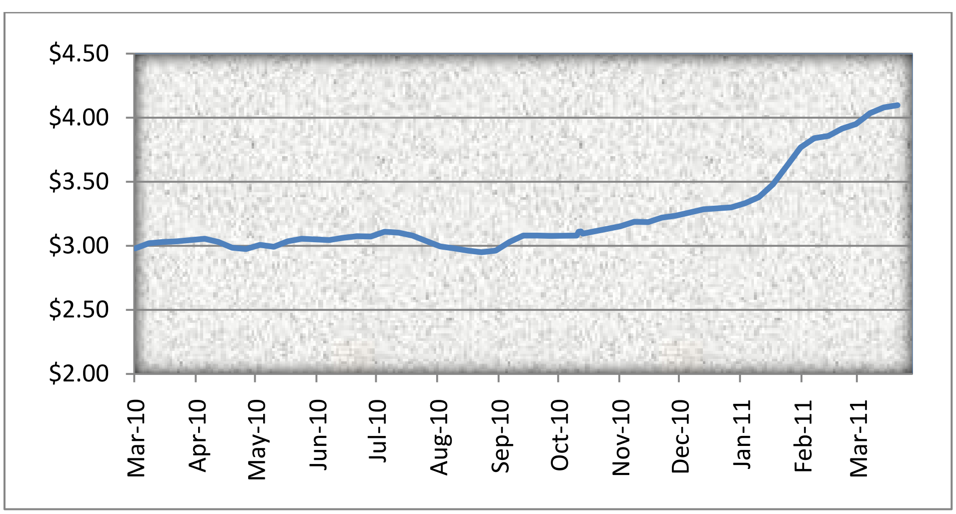


Note:Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



West Coast Gas Prices: Last 12 Months

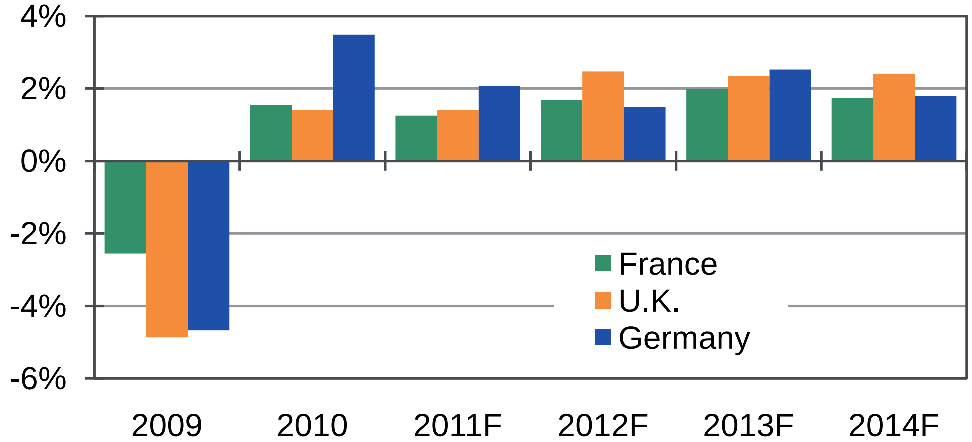


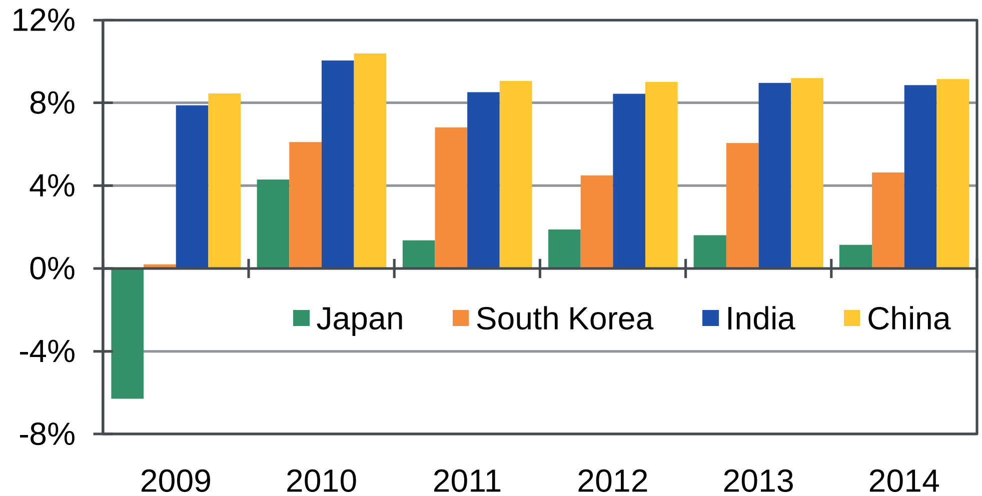
Sources: The Conference Board, Energy Information Administration

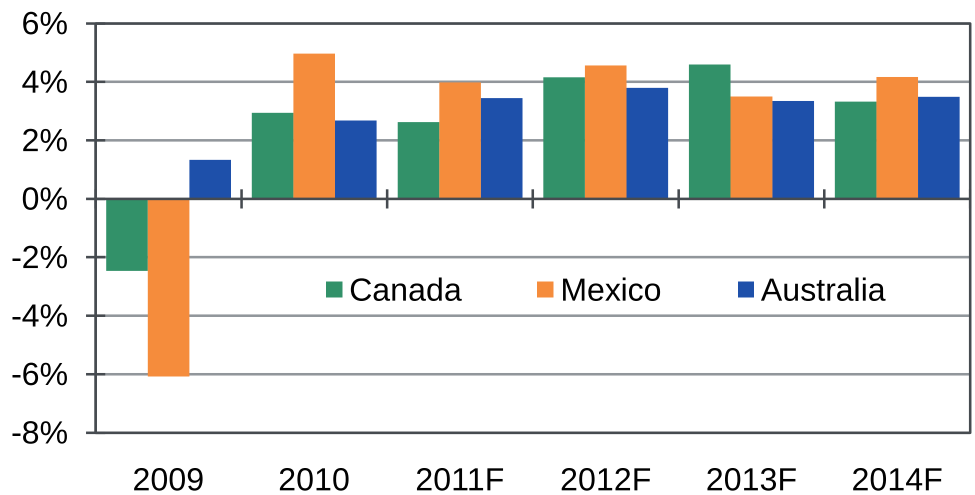
April 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2009-2014(f)



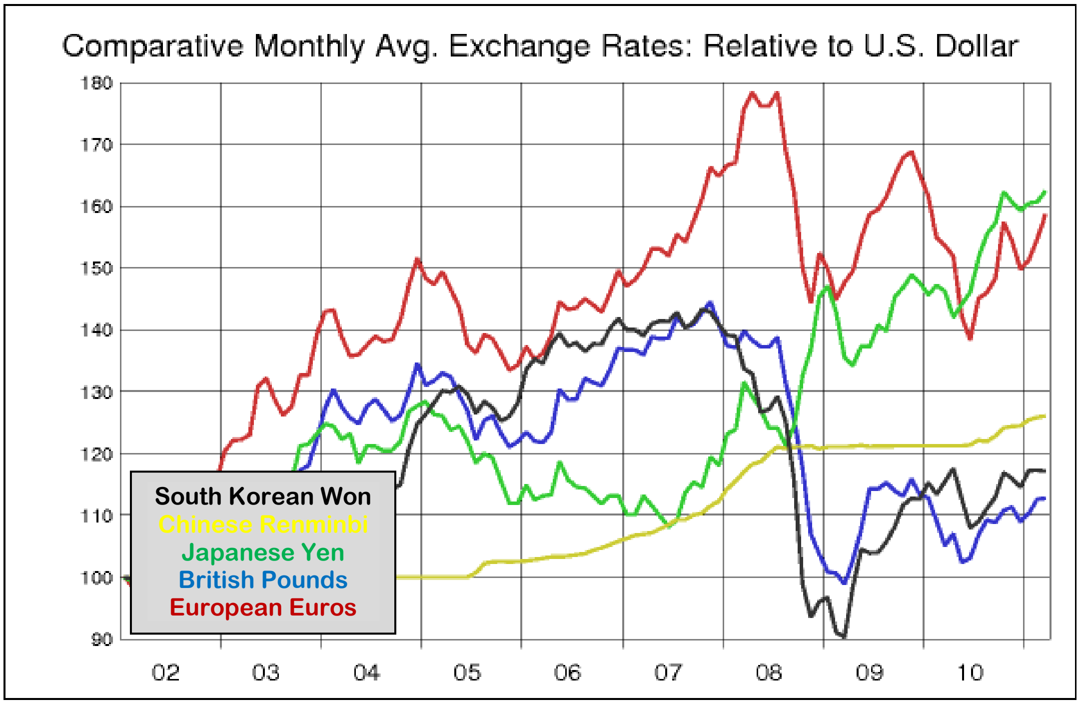




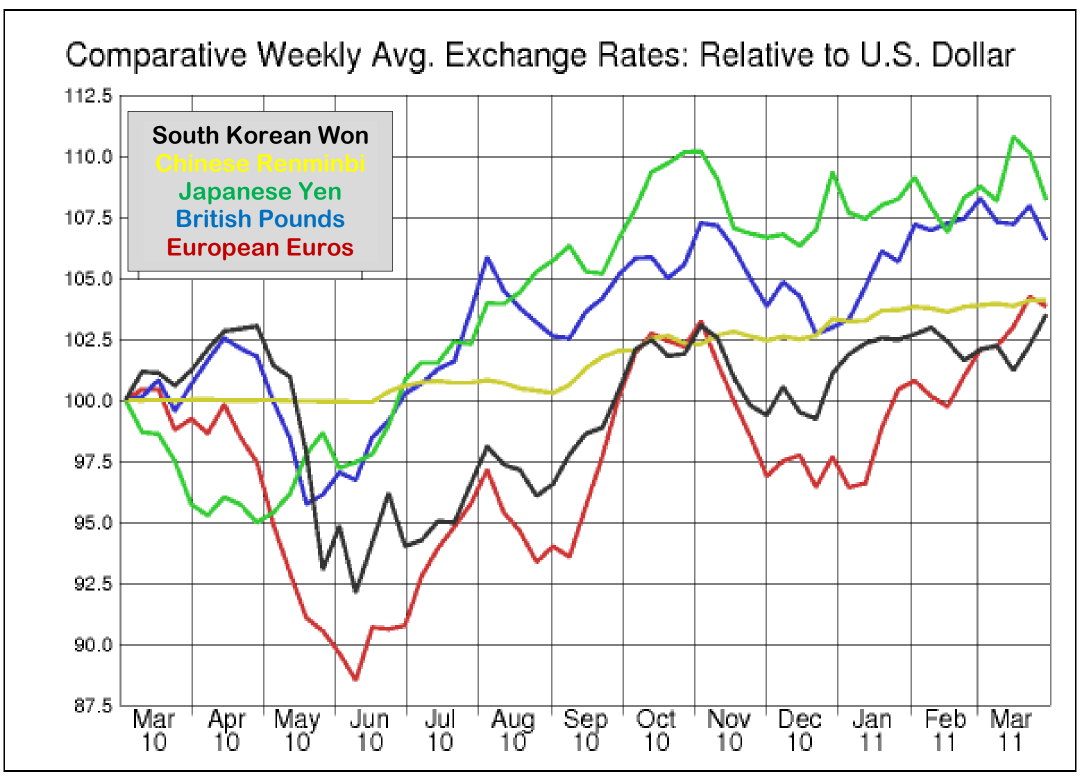
Sources: Moody's Economy.com, March 2011

Exchange Rates

Relative Change Since 2002



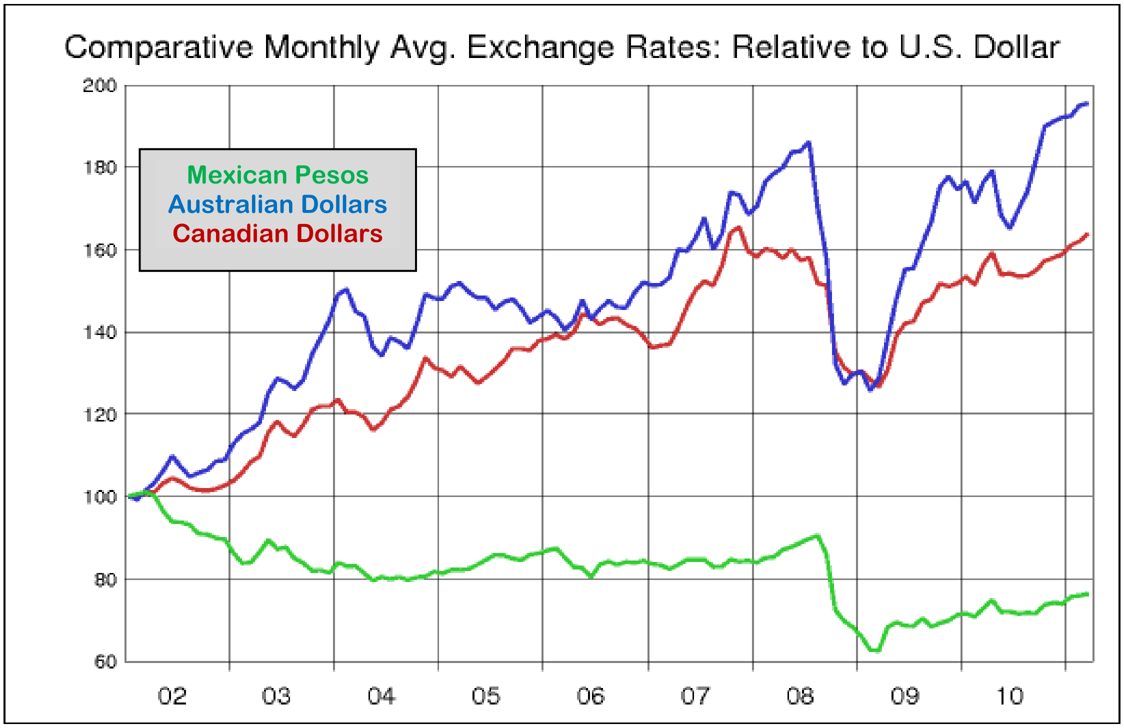
Change Last 12 Months



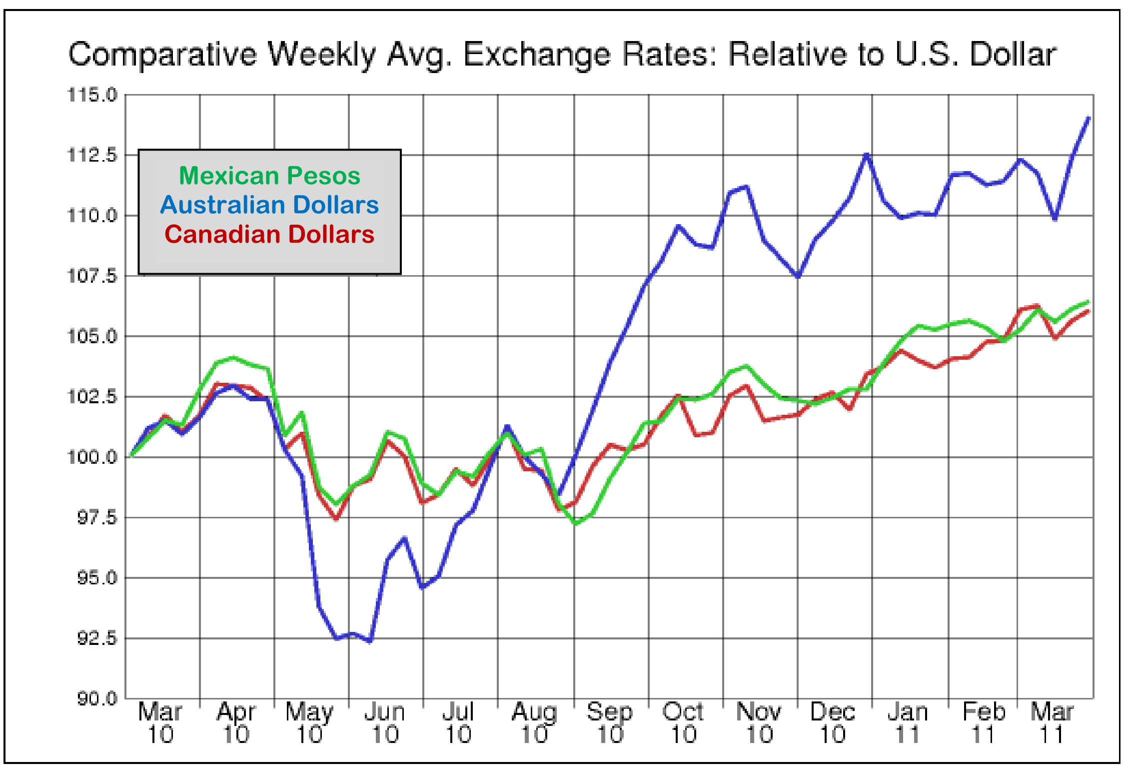
Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

Exchange Rates

Relative Change Since 2002



Change Last 12 Months



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, April 2011	Australia	Canada	China	France	Germany	Japan	Mexico	S. Korea	UK
Non-Stop Flights									
LAX	236	677	188	102	60	233	1,057	133	240
SFO	48	581	210	30	120	147	225	103	300
SAN	0	73	0	0	0	0	49	0	0
Total CA	284	1,439	398	132	180	380	1,547	236	390
Non-Stop Seats									
LAX	87,967	83,544	60,980	32,530	21,120	74,930	140,868	42,644	74,141
SFO	18,042	54,333	73,140	13,080	40,080	40,438	29,112	31,588	46,020
SAN	0	8,158	0	0	0	0	7,556	0	0
Total CA	106,009	162,793	134,120	45,610	61,200	115,368	206,575	74,232	120,161
Non-Stop Seats: Yr/Yr % Chg									
LAX	6%	3%	29%	10%	0%	-1%	-8%	-1%	-1%
SFO	2%	0%	0%	0%	0%	-33%	-19%	23%	0%
SAN	na	13%	na	na	na	na	2%	na	na
Total CA	5%	2%	11%	7%	0%	-15%	-6%	8%	0%

Data as of April 20, 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

APRIL TRAVEL/TOURISM
NEWS & TRENDS

Value Remains in Vogue: In Pursuit of the Best Deal

"…Results of the *2011 Portrait of American Travelers*™ reveal that value remains in vogue, and that travelers are still focused on finding the best fares and rates when planning and purchasing travel services, whether for business or leisure.

So where do travelers think they get the best prices on travel services? It comes as no surprise that the Internet is the shopping vehicle of choice (particularly among travelers less than 35 years of age), and the ability to comparison shop fares and rates across multiple travel suppliers is, increasingly, the reason cited why.

Consumers' belief in the likelihood of finding the best deals online is also the primary reason they "typically use" online travel agency (48%) sites such as Expedia, Travelocity, Orbitz and Priceline when shopping for travel services. The incidence of visitation of these sites clearly dominates that of supplier travel (35%) websites (their low fare and price guarantees notwithstanding), yet it is interesting to note that visitation of the sites that are most likely to yield the best deals (meta search sites) remains low. Specifically, only one in seven travelers has even been to a meta search site. Even fewer have visited private sale and/or collective buying sites. This is presumably because the latter don't enjoy the same degree of awareness among consumers, yet this is also likely to change in the year ahead.

The data also reveals an intriguing insight into the evolving role of the Internet when it comes to "planning" versus "purchasing" travel. Specifically, family and friends (52%) and travel guidebooks (46%) still trump Internet search engines (39%) as preferred sources of *"ideas and inspiration"* when planning leisure travel! Thus, the most effective destination and travel service supplier marketing strategies must include both offline and online components…."

YPartnership –Full Article

April Articles/Surveys

Consumer Trends/News

- Deloitte: Consumer 2020
- Me Entiendes-Revisiting Acculturation U.S. Latino market is linguistically fluid, anything but uniform, and populated by consumers who don't subscribe to labels like "Hispanic" or define themselves by race.

Travel Trends/News

- Mobile Travel Planners: Nearly a Third of Smartphone Users Will Research Travel Plans Via Mobile This Year

International Trends/News

- Overseas Travel to U.S. Sets New Record in 2010

Group/Business Trends/News

- Over Half of Business Travelers Book Hotels Using Mobile Technology

MeringCarson