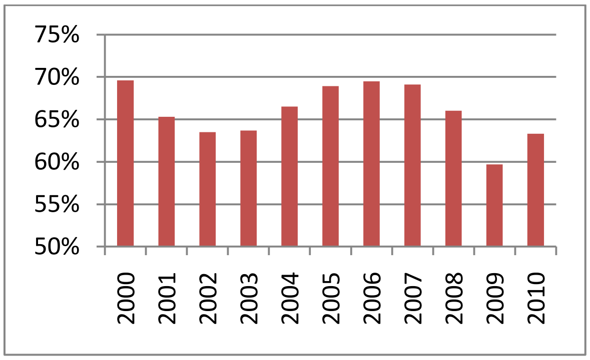
March 2011
California Travel & Tourism Commission
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

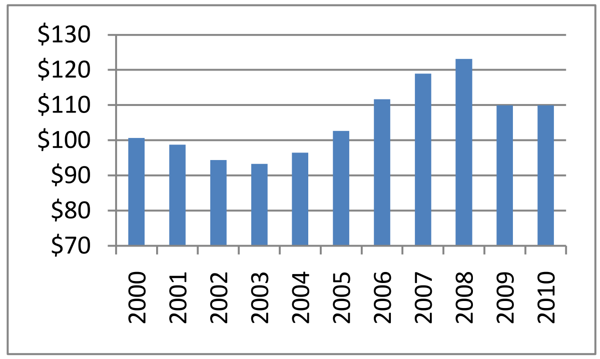
Detailed Lodging Tables

Link to Data Charts

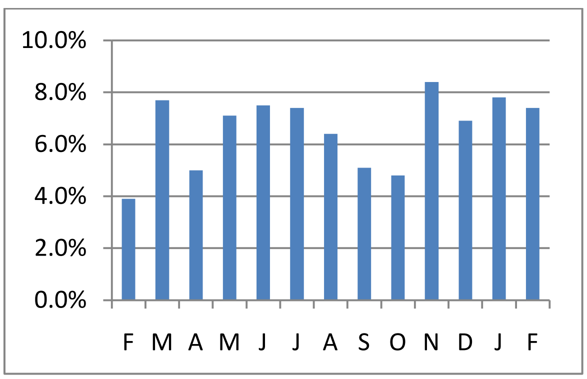
CA Occupancy: 2000-2010



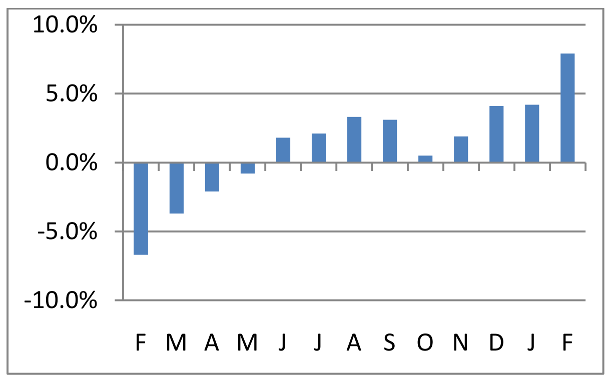
CA ADR: 2000-2010



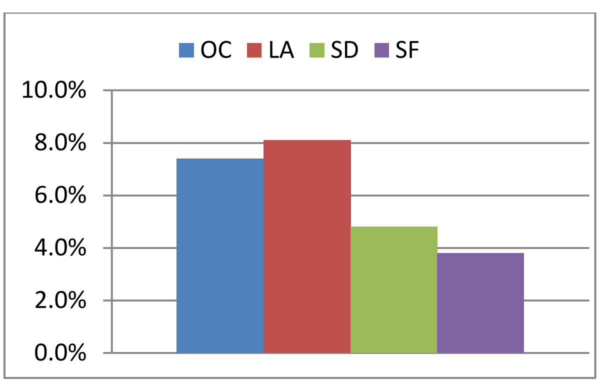
CA Occupancy Yr/Yr Chg: Last 12 Months



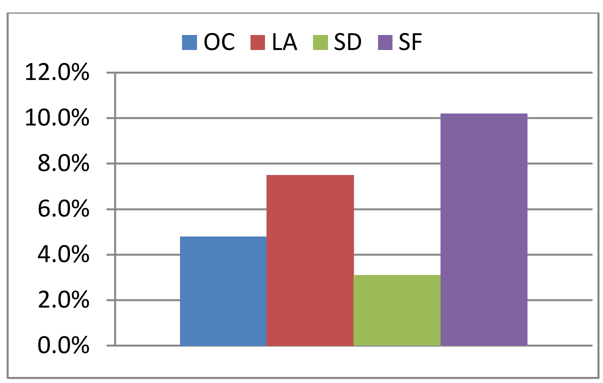
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: March 2011



Preliminary CA ADR Yr/Yr Chg: March 2011



Source: Smith Travel Research

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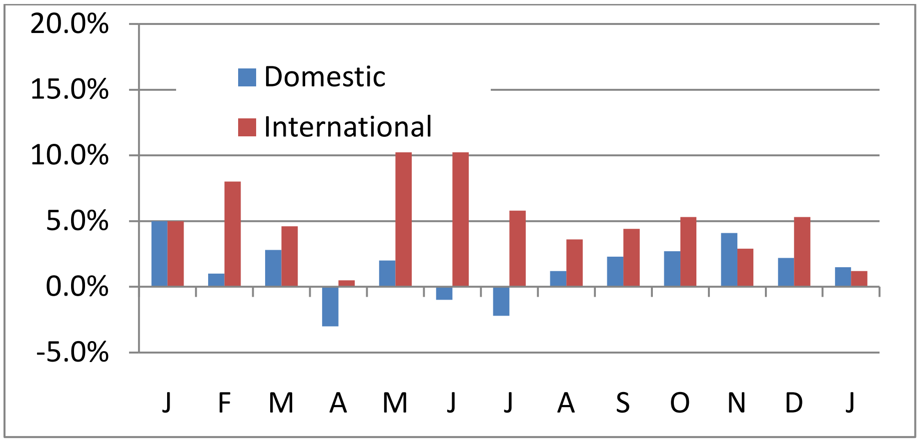
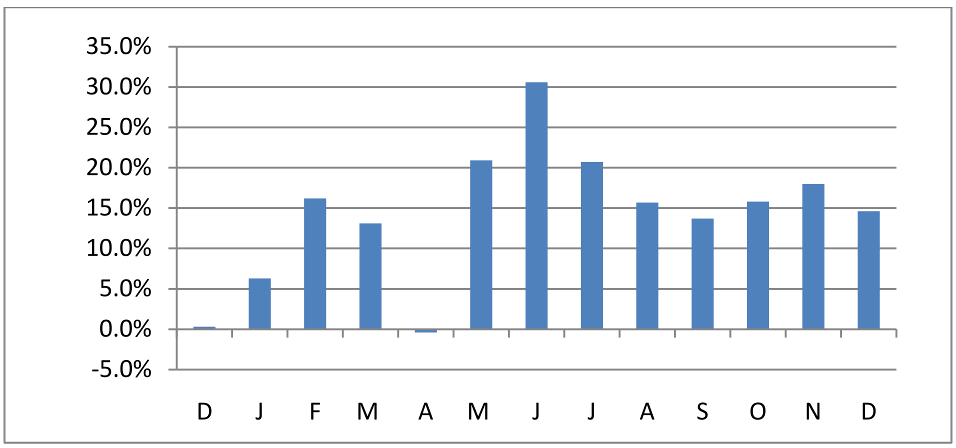
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

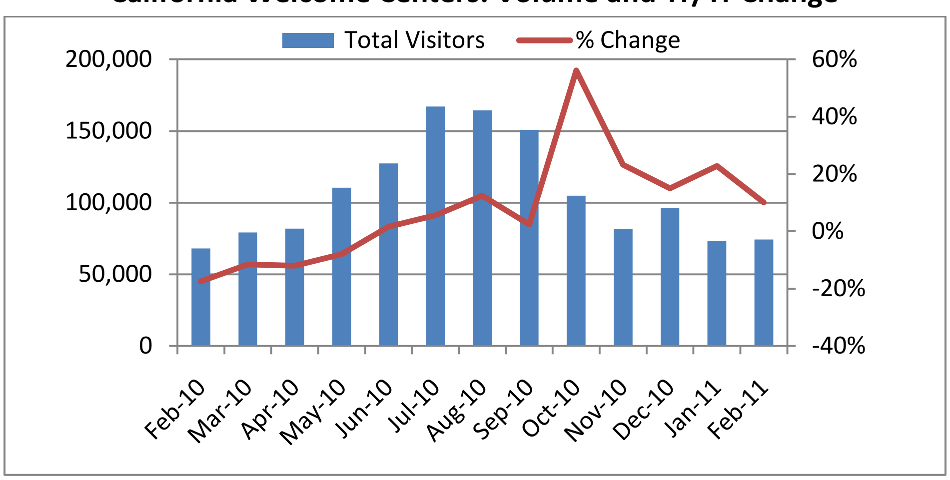


Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



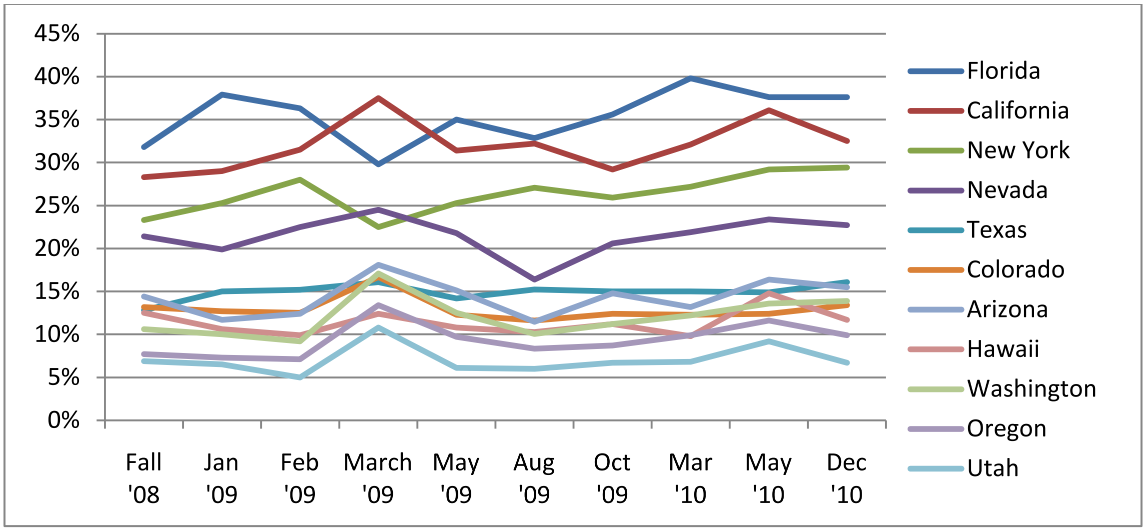
California Welcome Centers: Volume and Yr/Yr Change



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
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

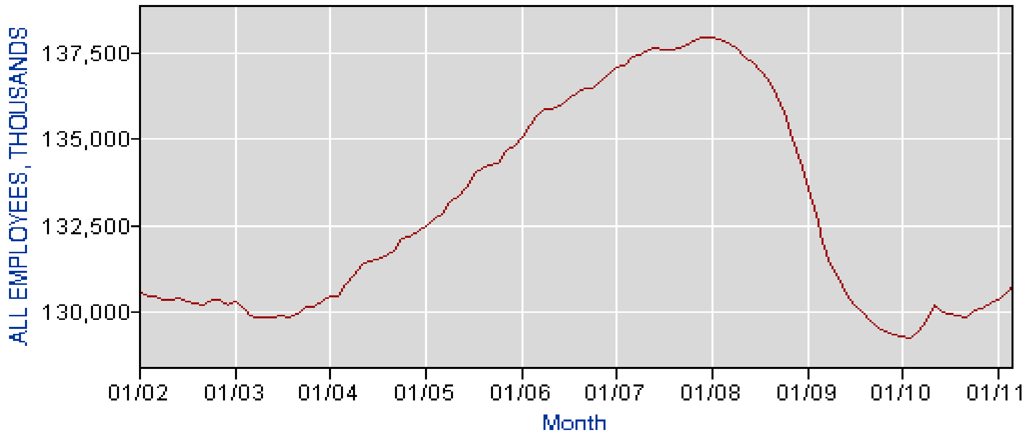
Activity	Jan '09	Feb '09	Mar '09	May '09	Aug '09	Sept '09	Oct '09	Mar '10	May '10	Dec '10
Will take fewer trips	25%	29%	21%	22%	17%	17%	17%	16%	17%	16%
Will choose closer destinations	14%	14%	21%	19%	17%	17%	17%	16%	16%	16%
Will take shorter trips	12%	13%	20%	20%	16%	16%	16%	15%	17%	16%
Spend less money 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.

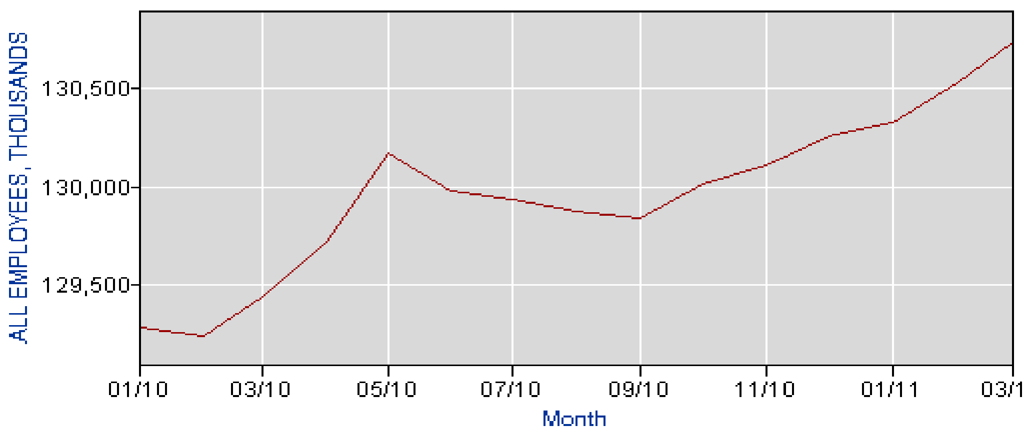
Sources: Strategic Marketing & Research, Inc., December 2010

ECONOMIC INDICATORS: *DOMESTIC*

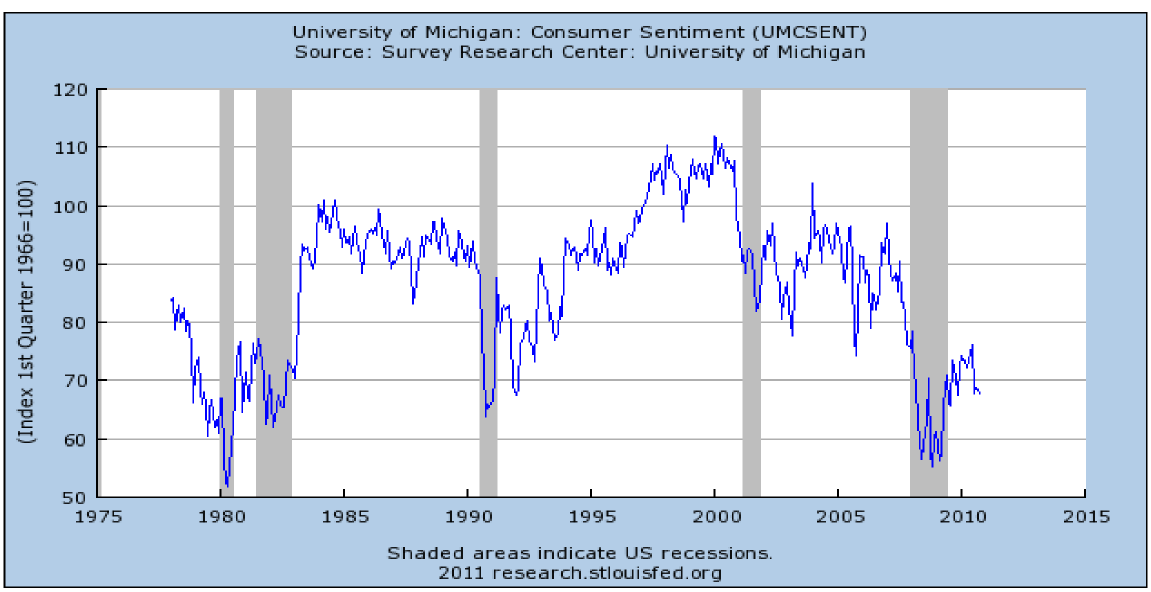
US Work Force: 2002-present



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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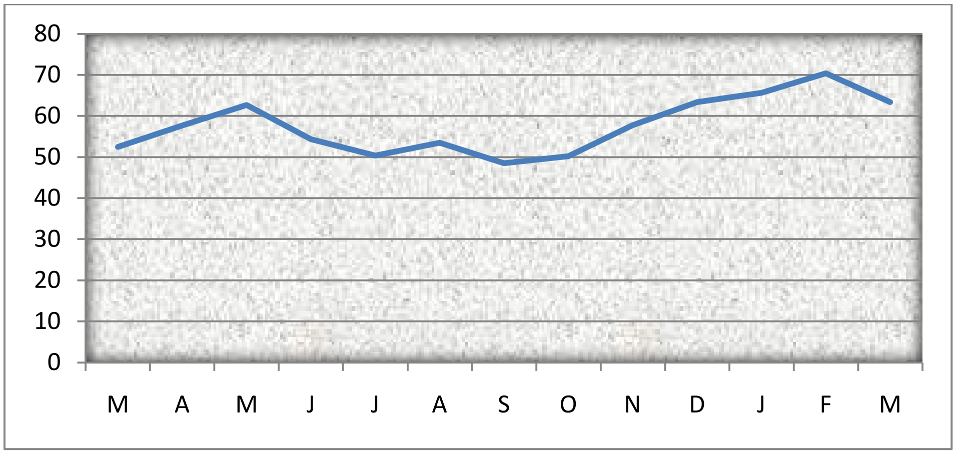
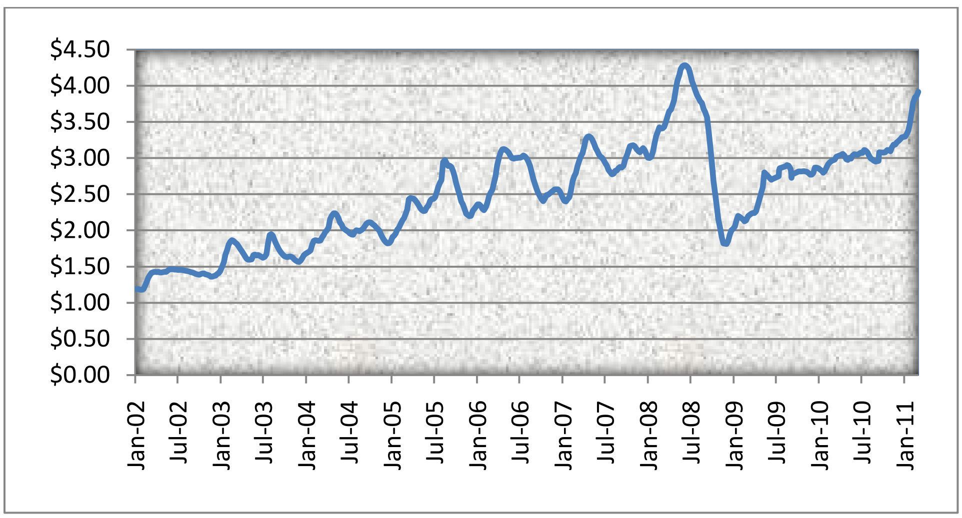
US Consumer Confidence Last 12 Months

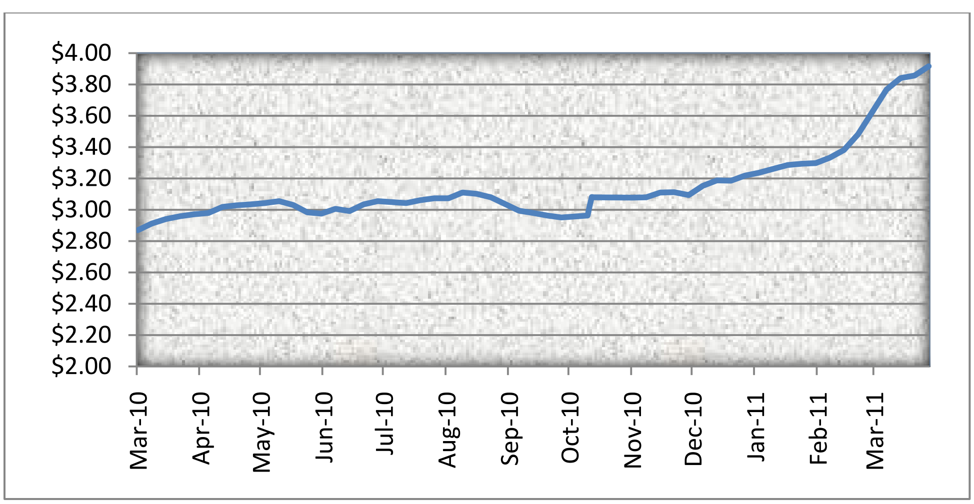


Note:Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



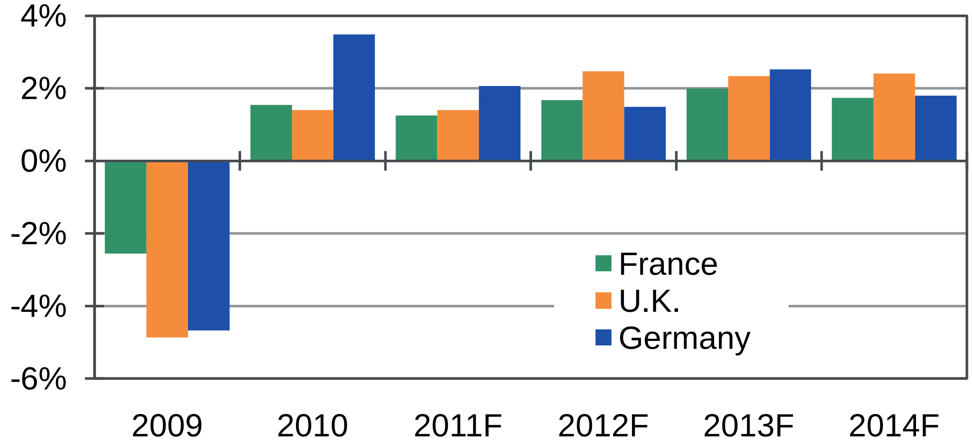
West Coast Gas Prices: Last 12 Months

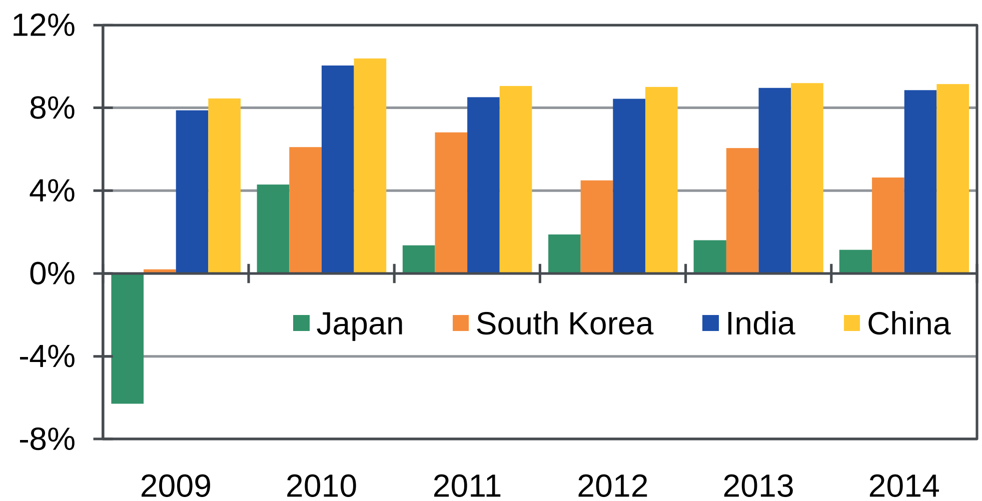


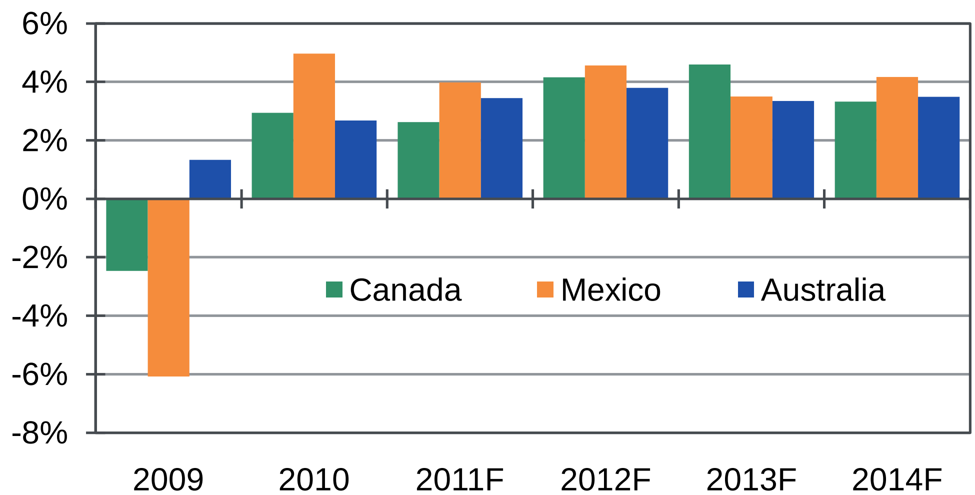
Sources: The Conference Board, Energy Information Administration

ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2009-2014(f)



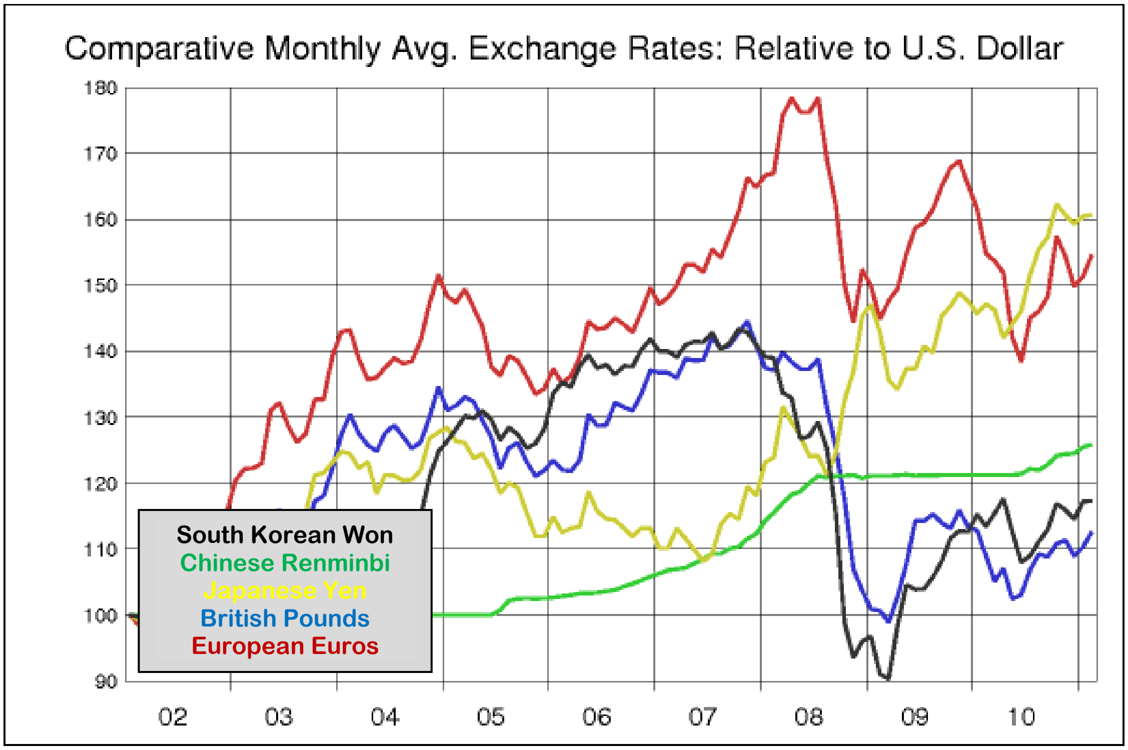




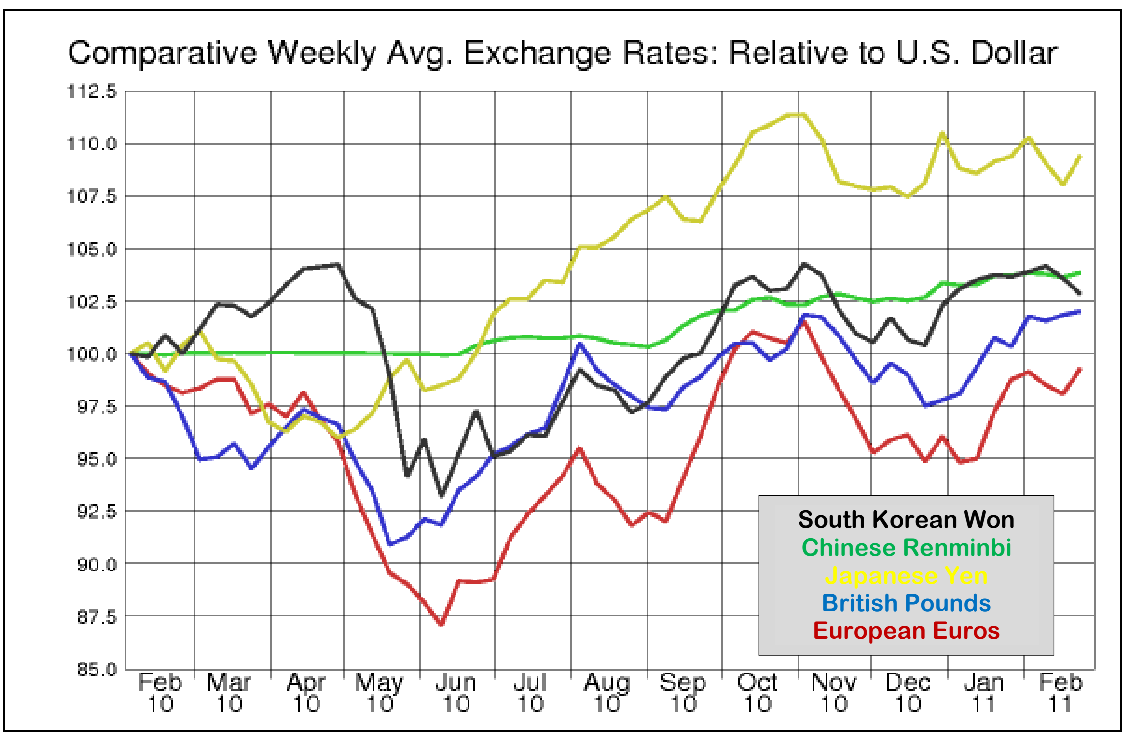
Sources: Moody's Economy.com, March 2011

Exchange Rates

Relative Change Since 2002



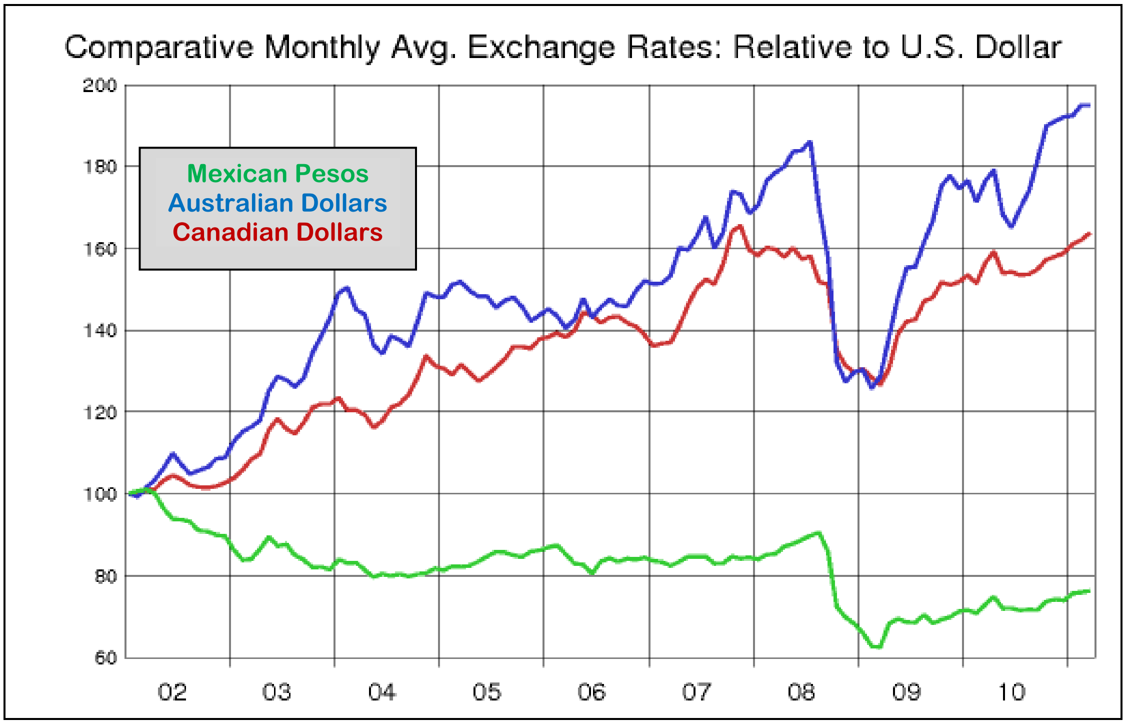
Change Last 12 Months



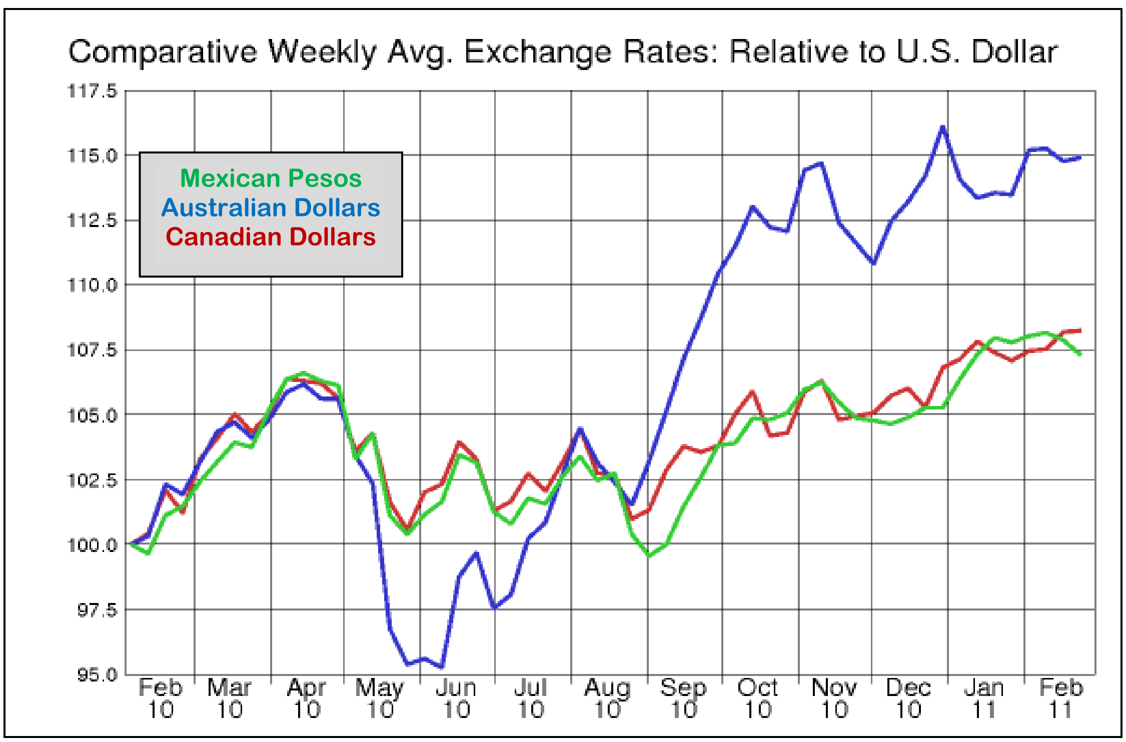
Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

Exchange Rates

Relative Change Since 2002



Change Last 12 Months



Sources: Moody's Economy.com, Pacific Exchange Rate Service – Prof. Werner Antweiler

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International Non-Stop Flights and Seats

Monthly Totals, CTTC Primary Target Markets

Monthly Air Service into California, March 2011	Australia	Canada	China	France	Germany	Japan	Mexico	S. Korea	UK
Non-Stop Flights									
LAX	247	739	157	81	55	277	1,064	137	219
SFO	47	637	217	31	93	160	228	99	127
SAN	0	75	0	0	0	0	62	0	0
Total CA	294	1,451	374	112	148	437	1,354	236	346
Non-Stop Seats									
LAX	91,625	92,490	53,341	25,953	19,542	96,694	140,902	43,754	68,205
SFO	17,658	62,761	72,220	9,252	33,418	46,667	29,840	30,504	39,394
SAN	0	8,371	0	0	0	0	9,344	0	0
Total CA	109,283	163,622	125,561	35,205	52,960	143,361	180,086	74,258	107,599
Non-Stop Seats: Yr/Yr % Chg									
LAX	7%	9%	12%	13%	2%	29%	-9%	-2%	-4%
SFO	-4%	11%	9%	2%	-3%	-13%	-21%	24%	-1%
SAN	na	12%	na	na	na	na	19%	na	na
Total CA	5%	10%	10%	10%	-1%	12%	-10%	7%	-3%

Data as of March 23, 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

MARCH TRAVEL/TOURISM
NEWS & TRENDS

"Random Acts of Kindness"-Why kind, human brands will thrive in a connected economy

For consumers long used to (and annoyed by) distant, inflexible and self-serving corporations, any acts of kindness by brands will be gratefully received. For brands, increasingly open communications both with and between consumers (especially online), means that it's never been easier to surprise and delight audiences with R.A.K.: whether sending gifts, responding to publicly expressed moods or just showing that they care.

Now is the ideal moment to engage in some R.A.K:

1. **HUMAN TOUCH**
   Consumers increasingly wanting to see the human side of brands (or if indeed a brand has a human side at all ;-), making R.A.K. more welcome than ever

2. **PUTTING IT OUT THERE**
   Audiences publicly disclose more and more personal information on Facebook, Twitter and other social networks, about their lives, moods and whereabouts, both current and intended, enabling R.A.K. to be more relevant

3. **PASS IT ON**
   More consumers than ever are now sharing their experiences with their friends and wider audiences on social networks, meaning R.A.K. can spread far beyond the original recipients

Full Article

March Articles/Surveys

Consumer Trends/News

- Deloitte Annual Survey "The State of Media Democracy" provides insight on how consumers interact with technology, respond to advertising and how they purchase products

Travel Trends/News

- Ypartnership/US Travel Association Traveler Sentiment Index™ (TSI) Soars to Highest Level Since April 2007

- PhoCusWright Study - U.S. Travel Activities Market Outperformed Overall U.S. Leisure Travel During Height of Recession

- Despite a Slow Recovery More People are Planning to Travel This Year and They Expect to Spend More Money Than They Did in 2010, According to Travelocity

- Travelers Perceive Value as Combination of Money, Time and Convenience, According to Smart Destinations Consumer Survey

International Trends/News

- Social Networking Grows Across All Euro Markets

Group/Business Trends/News

- 2011 Meetings Market Trends Survey Nearly 700 meeting planners share their opinions on how 2011 will shape up for the industry

MeringCarson