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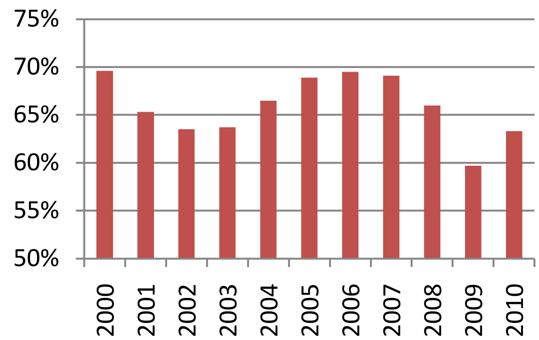
TOURISM INDUSTRY INDICATORS

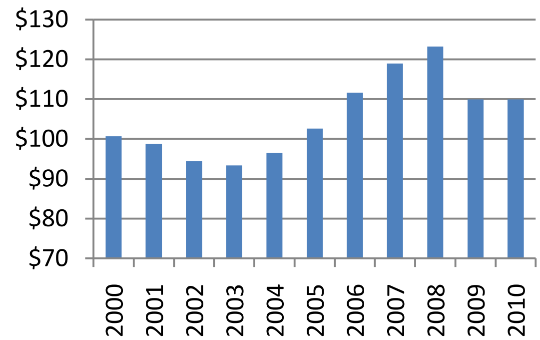
Detailed Lodging Tables

Link to Data Charts

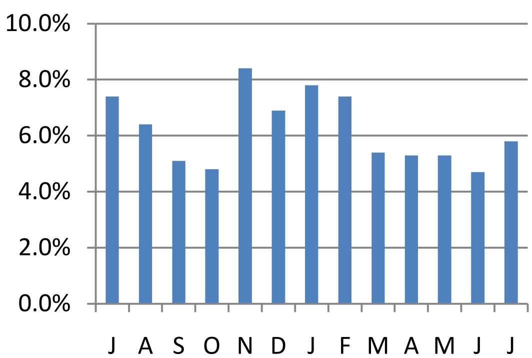
CA Occupancy: 2000-2010



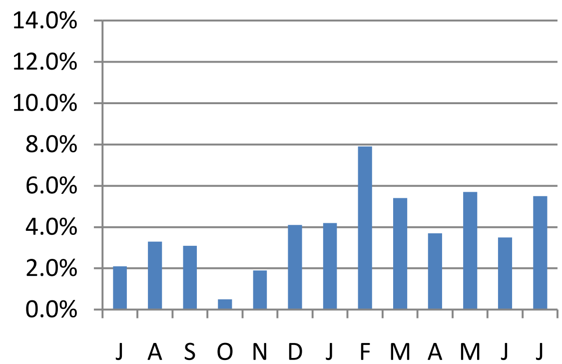
CA ADR: 2000-2010



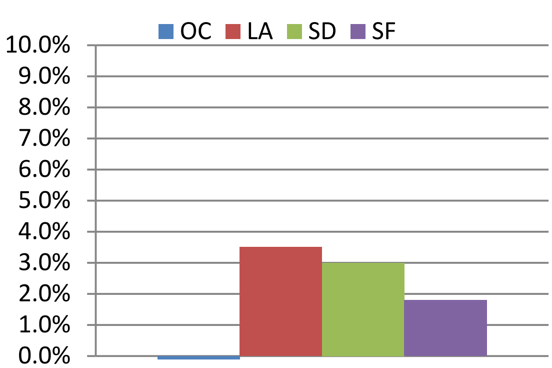
CA Occupancy Yr/Yr Chg: Last 12 Months



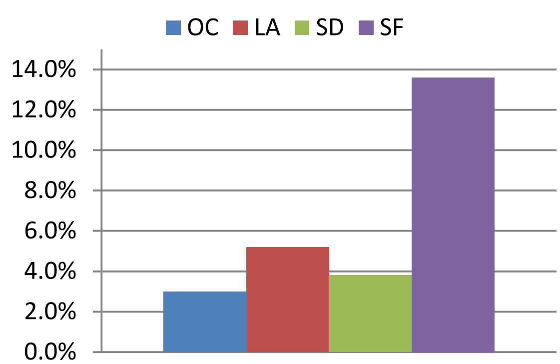
CA ADR Yr/Yr Chg: Last 12 Months



Preliminary CA Occupancy Yr/Yr Chg: August 2011



Preliminary CA ADR Yr/Yr Chg: August 2011



Source: Smith Travel Research

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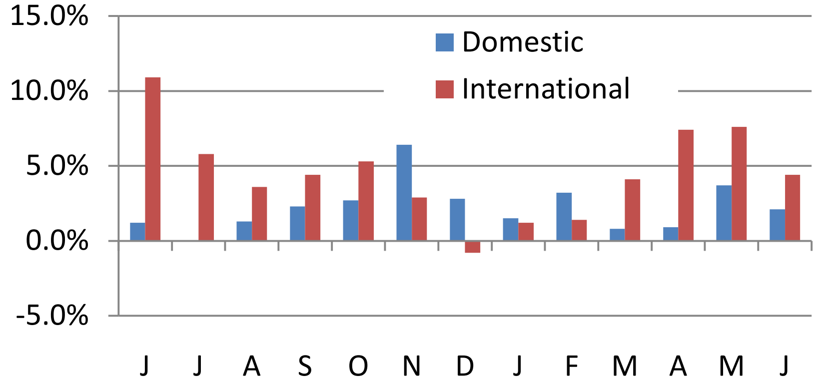
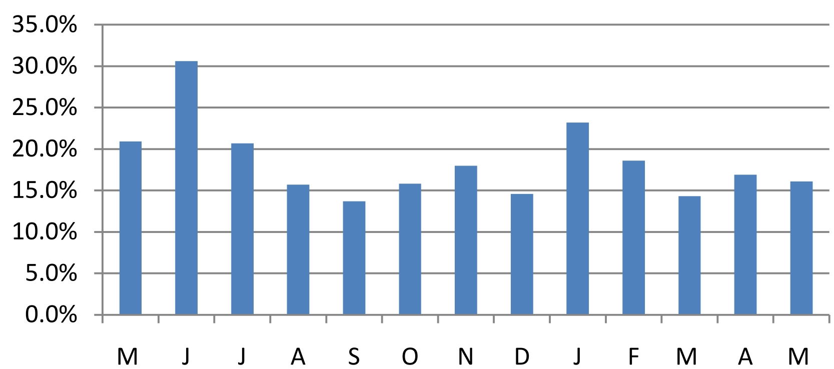
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts

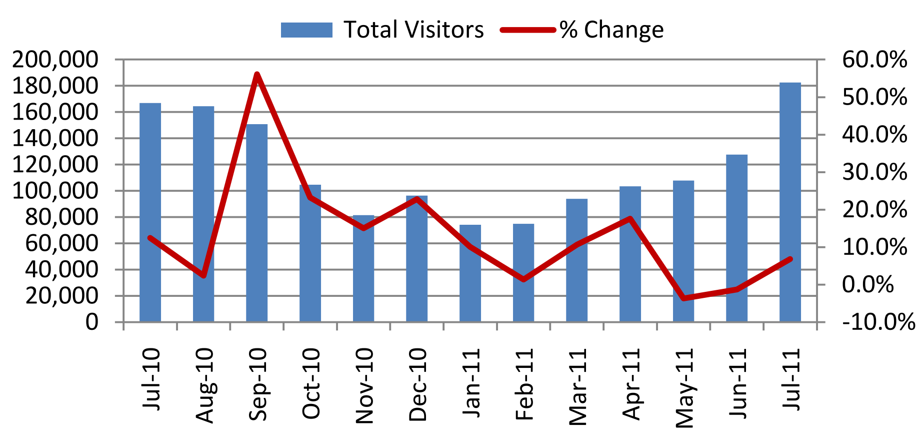


Overseas Arrivals Yr/Yr Chg: Last 12 Months

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

August 2011
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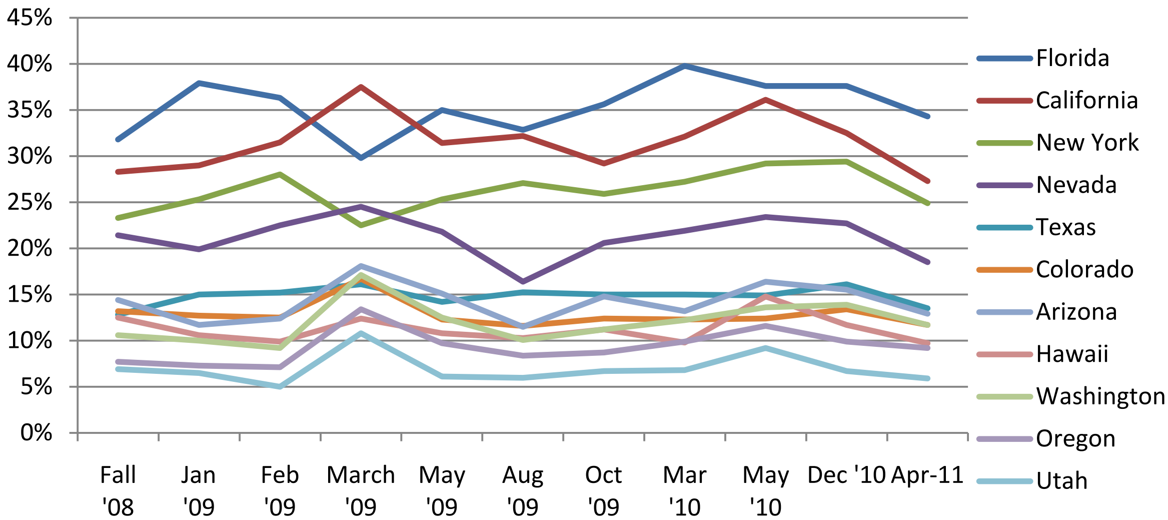
Monthly Tracking Dashboard

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	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

August 2011
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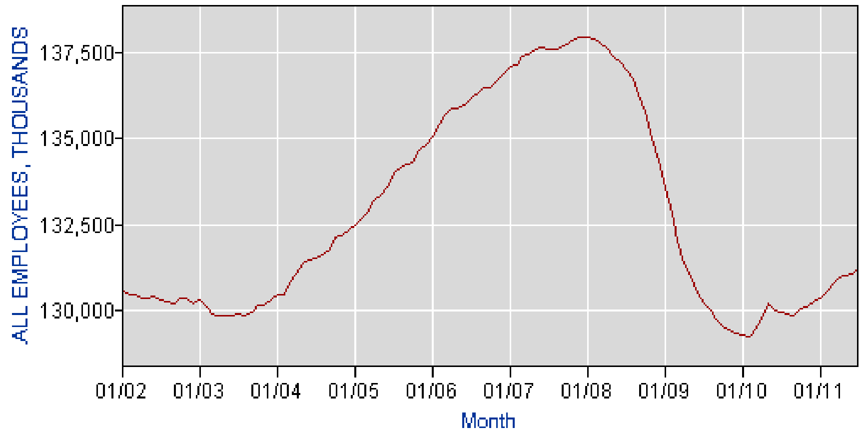
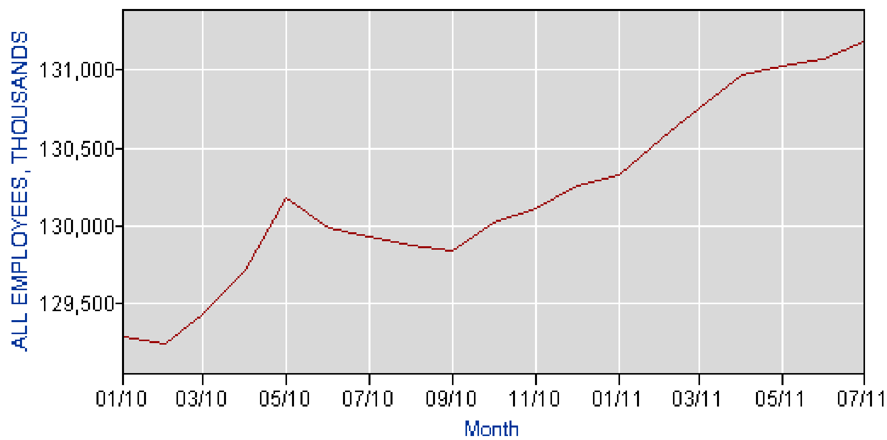
Monthly Tracking Dashboard

ECONOMIC INDICATORS: *DOMESTIC*

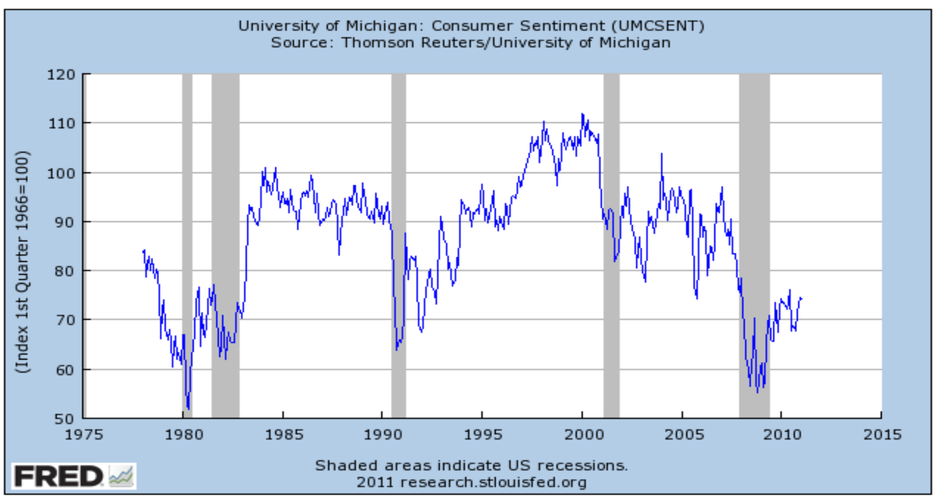
US Work Force: 2002-present



US Work Force: 2010-present



US Consumer Confidence: 1978-present



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

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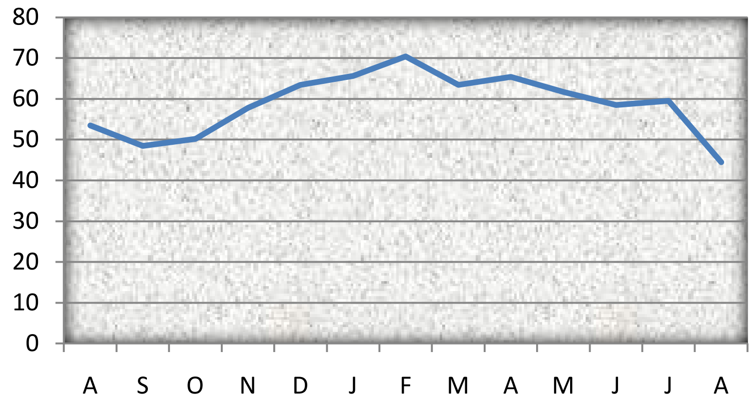
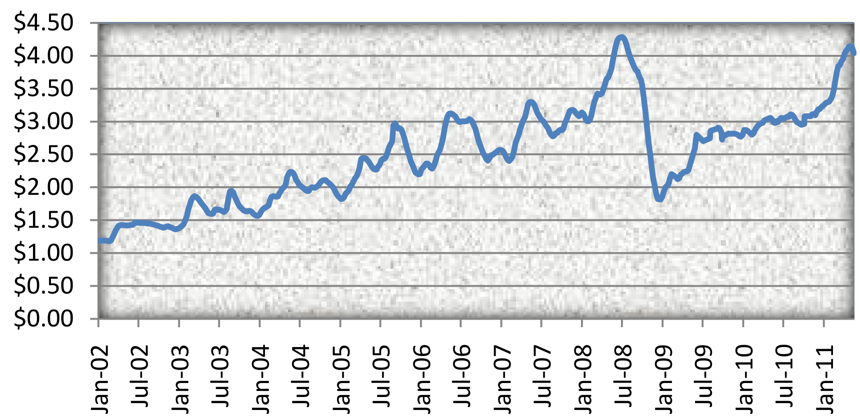
US Consumer Confidence Last 12 Months

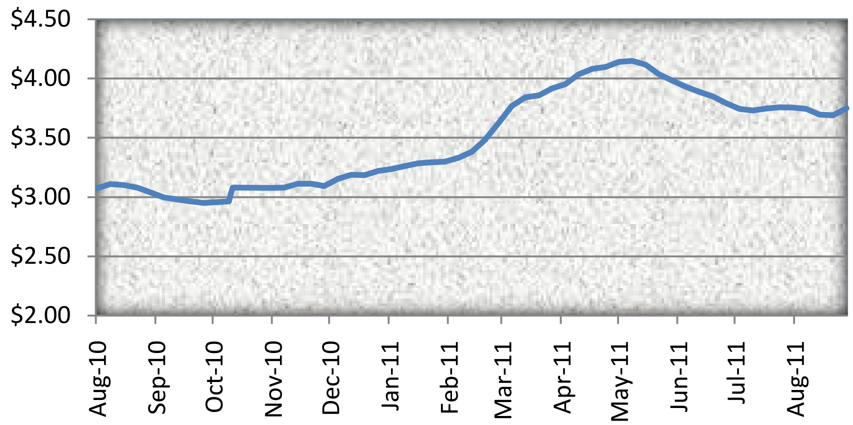


Note: Data from November 2010 have been revised due to revisions in the survey

West Coast Gas Prices: 2002-present



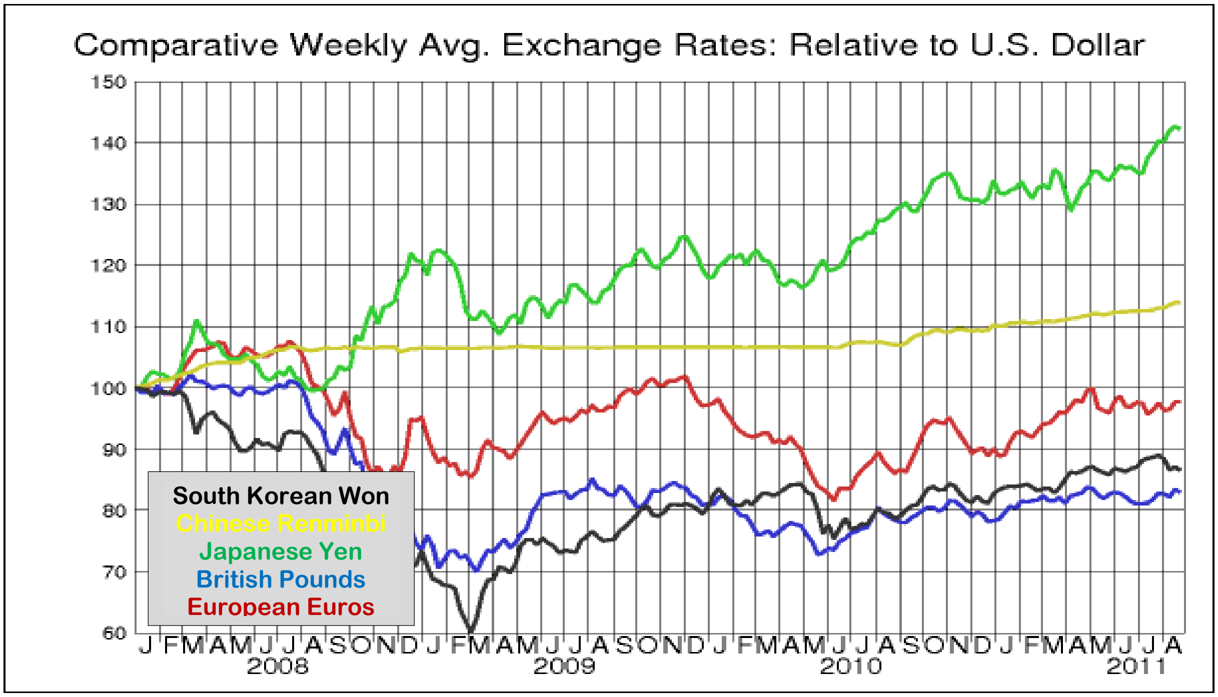
West Coast Gas Prices: Last 12 Months

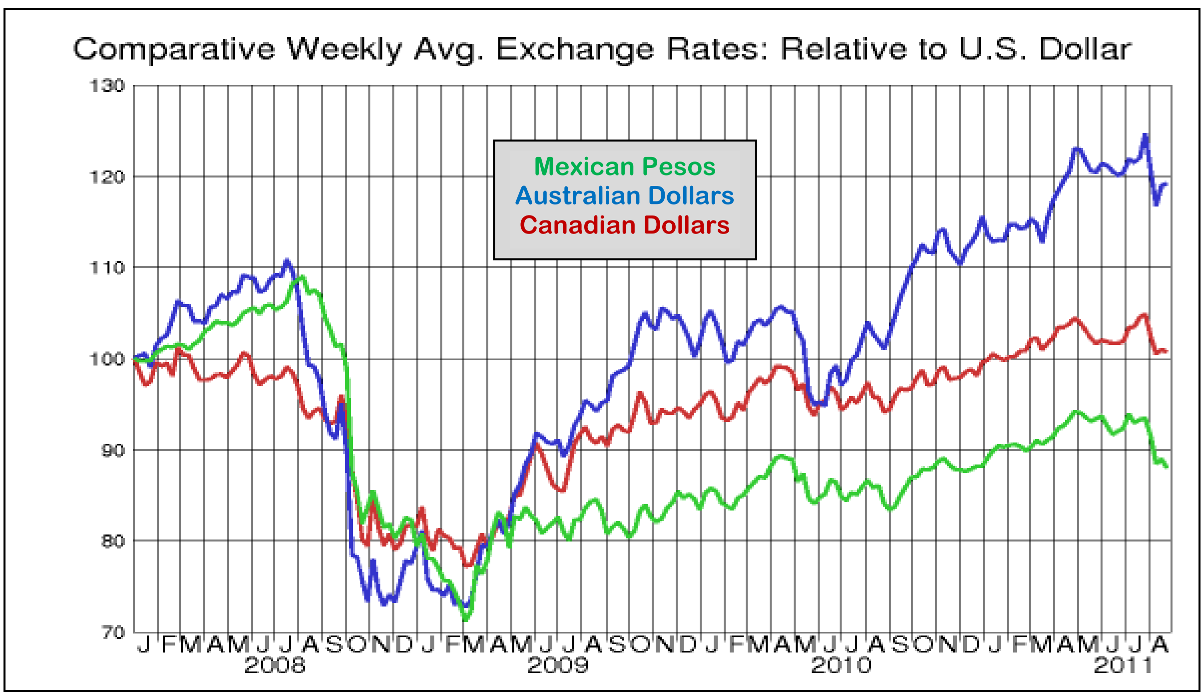


Sources: The Conference Board, Energy Information Administration

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, August 2011	Australia	China	France	Germany	Japan	S. Korea	UK
Non-Stop Flights							
LAX	243	230	120	111	279	169	248
SFO	31	217	44	137	186	124	155
SAN	0	0	0	0	0	0	31
Total CA	274	447	164	248	465	293	434
Non-Stop Seats							
LAX	88,881	73,932	38,039	38,942	93,093	51,511	76,434
SFO	11,594	76,353	20,214	49,904	58,528	37,510	50,871
SAN	0	0	0	0	0	0	7,006
Total CA	100,475	150,285	58,253	88,846	151,621	89,021	134,311
Non-Stop Seats: Yr/Yr % Chg							
LAX	9%	35%	2%	8%	28%	10%	-2%
SFO	-31%	0%	19%	13%	-4%	7%	0%
SAN	na	na	na	na	na	na	100%
Total CA	2%	15%	8%	11%	14%	9%	4%

International Air Service into California, August 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	8019	377%
LAX	770	96885	2%	1013	135906	-7%
OAK	0	0	na	83	11039	9%
ONT	0	0	na	31	3974	100%
PSP	13	1768	53%	0	0	na
SAN	84	9595	10%	97	13609	180%
SFO	771	81456	-6%	262	36521	12%
SJC	0	0	na	69	9537	11%
SMF	0	0	na	44	6015	1332%
SNA	62	8432	127%	0	0	na
Total CA	1700	198136	2%	1661	224620	10%

Data as of August 30, 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

August 2011
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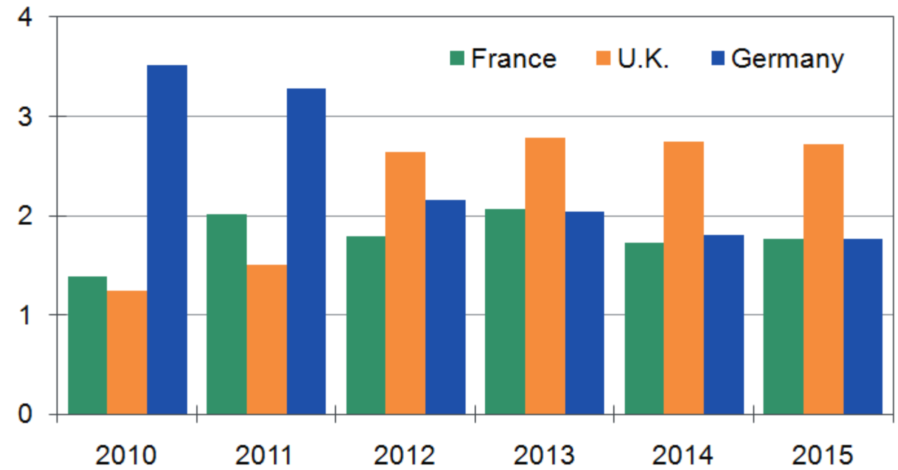
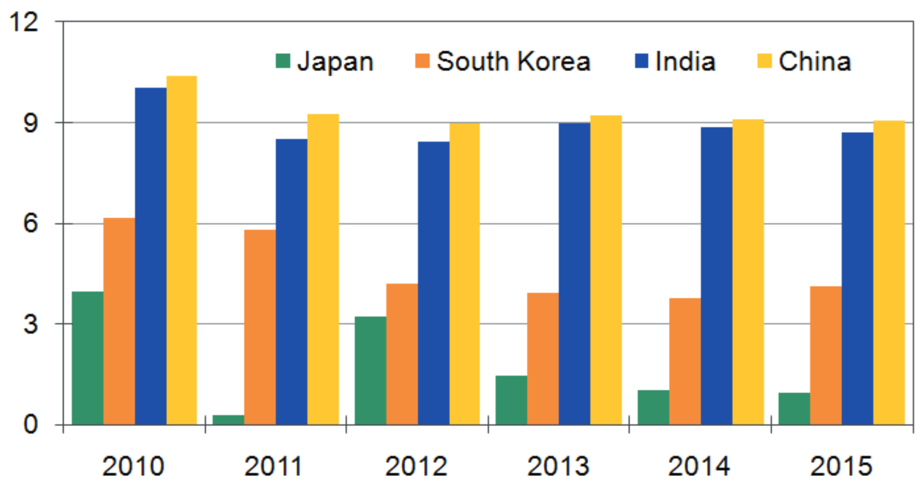
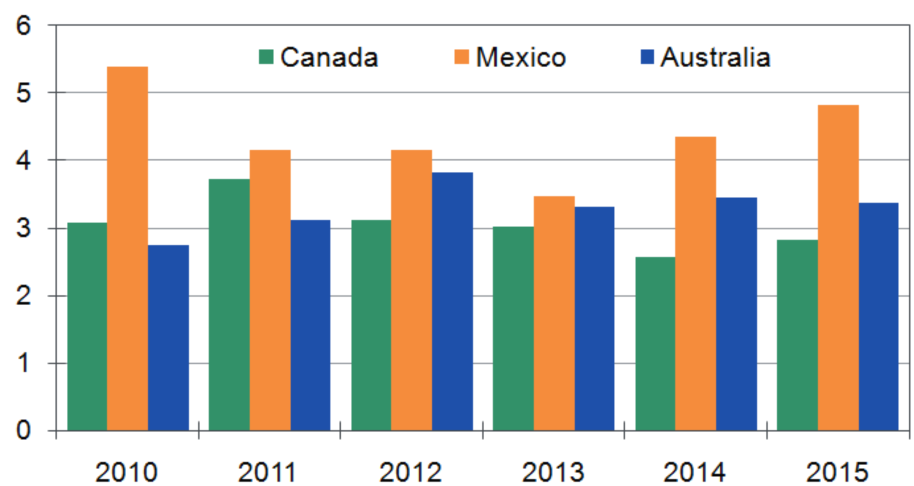
ECONOMIC INDICATORS: *INTERNATIONAL*

GDP, % Change: 2010-2015(f)







Sources: Moody's Economy.com, May 2011

AUGUST TRAVEL/TOURISM NEWS & TRENDS

Featured Article:

Anatomy of the New Micro-Tripper in Travel

What is the Micro-Tripper? It's the short-term, purely spontaneous travel enabled by the flash sale, group buying, and private-travel sale start-ups.

The spontaneous micro-tripper, created via the convergence of social networking and sharing, new ecommerce technology, an extended recession, our insatiable desire to buy deals, and email marketing, is the primary delivery path of the new "travel deal" product.

The woman in the family leads the spontaneous micro-tripper. Micro-trippers take between three and five trips per year, on one- or two-night stays. Micro-trippers are staying at lodging properties and destinations that 75% of the trippers are unfamiliar with, and/or have never visited before, and did not plan on traveling to.

The trips purchased were never consciously planned or pre-planned and an overwhelming number of the purchases by micro-trippers occurred within twenty-four hours of hearing about the trip from their friends and family, or through the email marketing that comes into their email box.

The spontaneous micro-tripper is not an OTA buyer (the pre-planned travel market). The micro-tripper market is unlike any mature travel market. I believe this new market is being driven not by the 50%-off deal, like most people think, but by the power of the spontaneous purchase and the opportunity it creates for the lodging industry as a new online distribution channel.

Full Article

August Articles/Surveys

Consumer Trends/News

- Economic Pessimism Increases – Harris Poll
- Special Report: Mobile Devices Taking Over- How Americans Use Smart Phones and Tablets and the Devices or Media They Replace –Biginsight
- Deep Downturn in Luxury Consumer Confidence Casts Doubt on Up Coming Third & Fourth Quarters -- Unity Marketing's Luxury Consumption Index took nose-dive in July

Travel Trends/News

- Mobile Apps are Making it Easier for Last-Minute Travelers to Book Hotel Rooms and Rental Cars Cheaper—and Later—Than Ever. - WSJ
- 8 in 10 Vacationers Bring Tech Devices-Young, wealthy above average – Gallup
- First 3D Interactive Tourism Site – Video Sample

Group/Business Trends/News

- The Business Traveler of Today: New Study Profiles Corporate Travelers, Their Needs While in Transit and Technology Used to Travel Smarter and Adapt to Life on the Road-GBTA