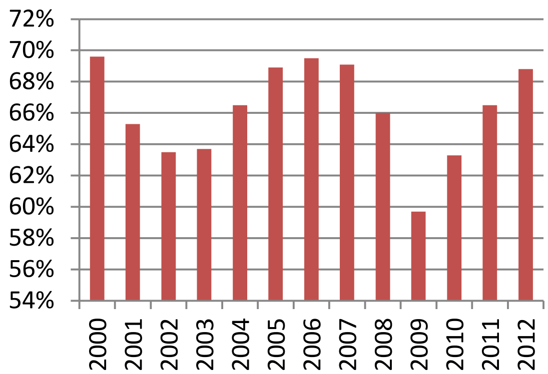
August 2013
Visit California
Monthly Tracking Dashboard

TOURISM INDUSTRY INDICATORS

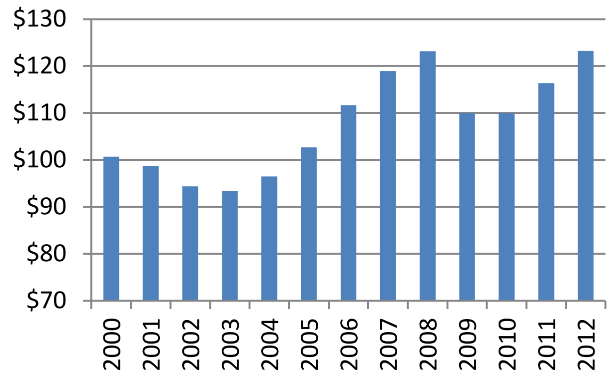
Detailed Lodging Tables

[Link to Data Charts](#)

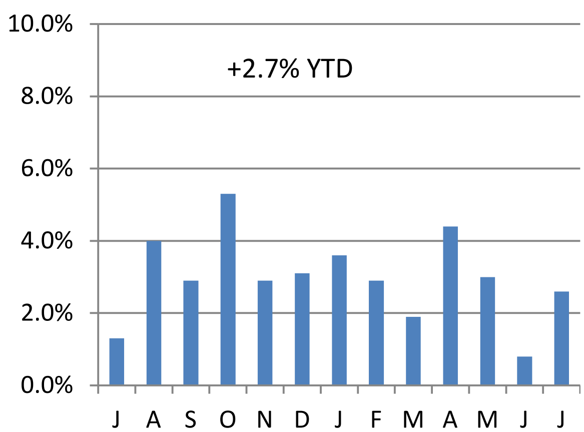
CA Occupancy: 2000-2012



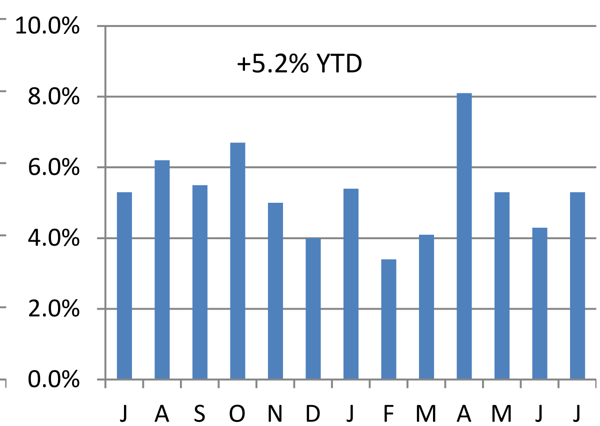
CA ADR: 2000-2012



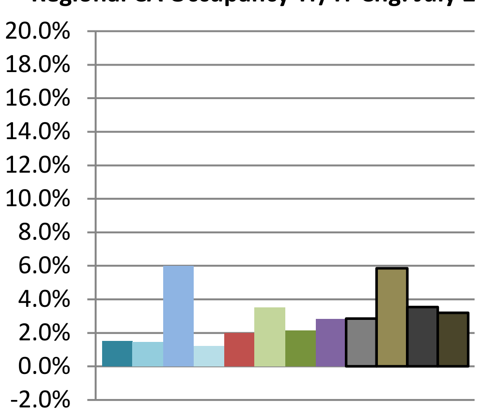
CA Occupancy Yr/Yr Chg: Last 12 Months



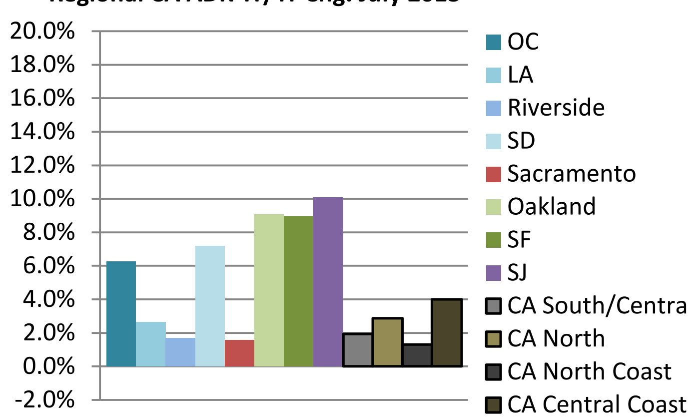
CA ADR Yr/Yr Chg: Last 12 Month



Regional CA Occupancy Yr/Yr Chg: July 2013



Regional CA ADR Yr/Yr Chg: July 2013



Source: Smith Travel Research

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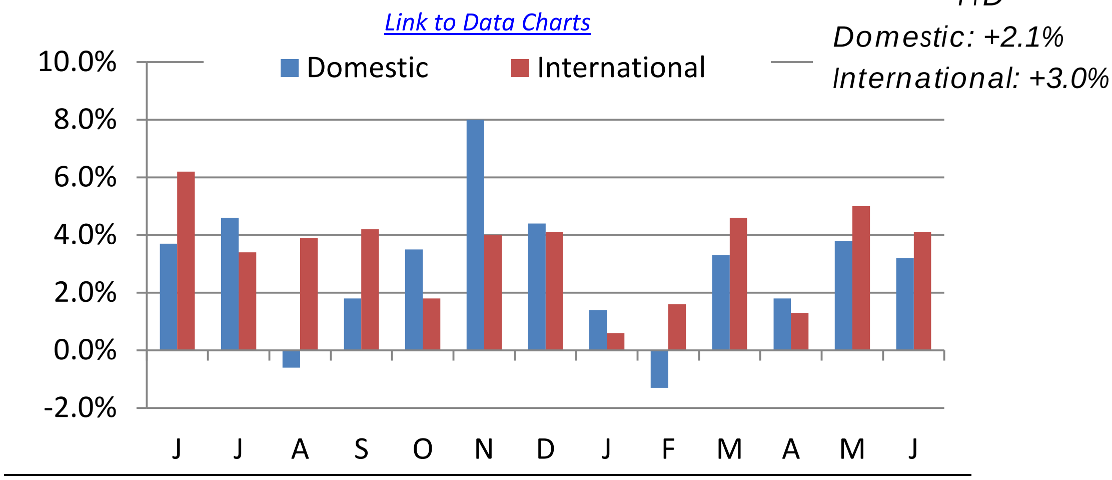
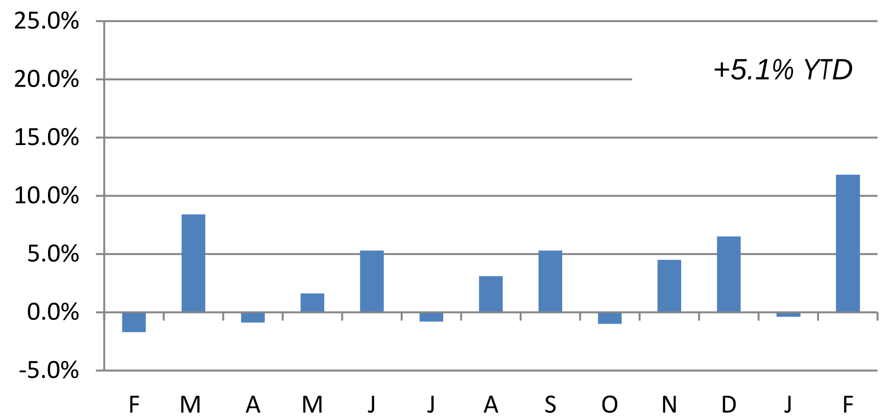
CA Airport Traffic Yr/Yr Chg: Last 12 Months

Link to Data Charts



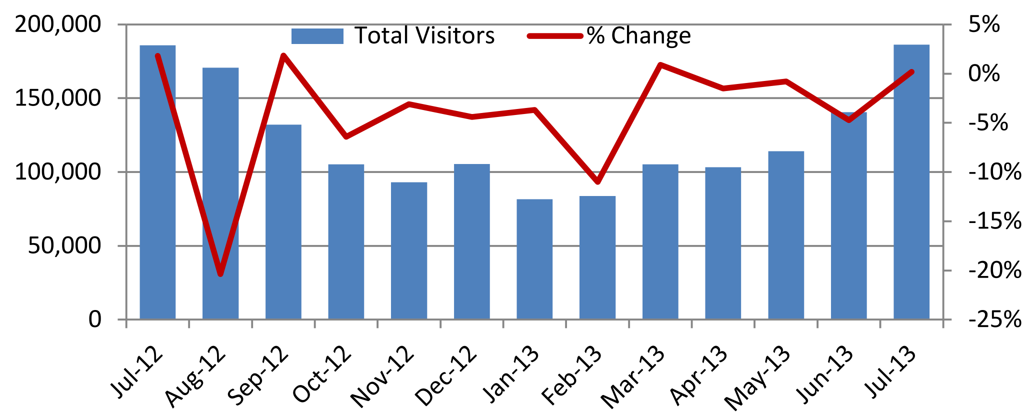
Overseas Arrivals Yr/Yr Chg: Last 12 Months

Link to Data Charts



California Welcome Centers: Volume and Yr/Yr Change

YTD
Volume: 814,754
% Change: -2.6%



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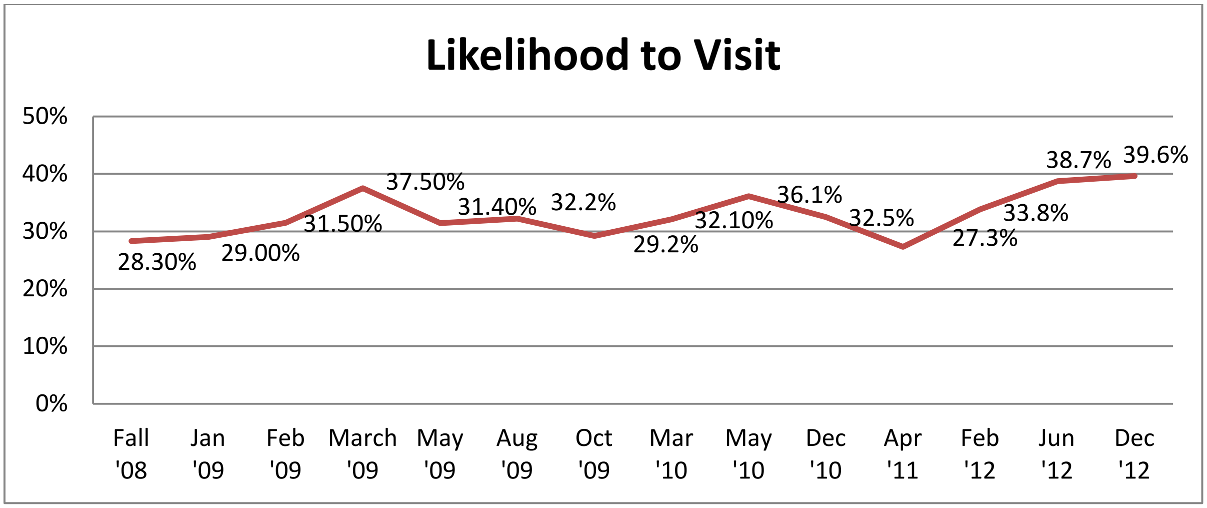
US Travelers: % Who Intend to Travel to California in Next 12 Months



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	Feb '12	June '12	Dec '12
Primary	50%	45%	48%	49%	50%	52%	47%	47%	55%	51%	49%	40%	45%	40%	52%
National	18%	20%	20%	23%	29%	21%	24%	21%	21%	28%	24%	18%	23%	15%	29%
In-State	79%	71%	74%	75%	82%	78%	77%	72%	90%	81%	75%	74%	73%	82%	82%

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	Dec '11	Feb '12	Jun '12	Dec '12
Will take fewer trips	25%	29%	21%	22%	17%	17%	17%	16%	17%	16%	18%	13%	9%	10%	11%
Will choose closer destinations	14%	14%	21%	19%	17%	17%	17%	16%	16%	16%	19%	12%	9%	9%	10%
Will take shorter trips	12%	13%	20%	20%	16%	16%	16%	15%	17%	16%	17%	13%	9%	10%	11%
Spend less money on leisure travel	23%	23%	31%	28%	24%	24%	24%	22%	23%	18%	21%	16%	11%	14%	14%
Stay with VFR vs. paid accommodations	22%	21%	24%	23%	22%	22%	22%	21%	25%	17%	17%	16%	11%	11%	15%
Choose to drive vs. fly	24%	24%	25%	30%	24%	28%	28%	28%	27%	27%	30%	28%	22%	21%	20%

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., February 2012

Travel Trade Barometer Projections

Canada Travel Trade Barometer 2013 S1												
Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 4-9%	82%	0%	9%	Higher	78%	11%	11%	Higher	78%	11%	11%
California	Up 10-15%	82%	0%	9%	Higher	78%	11%	11%	Higher	78%	11%	11%

United Kingdom Travel Trade Barometer 2013 S1																
Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)				4th Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 1-3%	58%	17%	25%	Higher	80%	0%	20%	Higher	70%	20%	10%	AS	60%	10%	20%
California	Up 1-3%	58%	0%	25%	Higher	70%	10%	10%	Higher	50%	20%	10%	Higher	40%	20%	10%

Japan Travel Trade Barometer 2012 S3 R12																
Change in Bookings	2nd Qtr 2012				3rd Qtr 2012				4th Qtr 2012 (P)				1st Qtr 2013 (P)			
	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓	Mean	↑	NC	↓
U.S. Mainland	Up 10-15%	100%	0%	0%	Up 10-15%	100%	0%	0%	Higher	60%	40%	0%	Higher	40%	60%	0%
California	Up 1-3%	80%	0%	20%	Up 1-3%	80%	0%	20%	Higher	60%	40%	0%	AS	40%	40%	20%

Germany Travel Trade Barometer 2013 S1												
	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	NC	57%	0%	43%	Higher	57%	14%	29%	Higher	57%	14%	29%
California	Up 1-3%	57%	0%	29%	Higher	57%	14%	29%	Higher	57%	14%	29%

Mexico Travel Trade Barometer 2012 S4																
Change in Bookings	4th Qtr 2012				Year-End 2012				1st Qtr 2013 (P)				2nd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	Up 4-9%	100%	0%	0%	Up 4-9%	100%	0%	0%	Higher	83%	17%	0%	Higher	83%	17%	0%
California	Up 1-3%	67%	17%	17%	Up 1-3%	83%	17%	0%	Higher	67%	33%	0%	Higher	83%	17%	0%

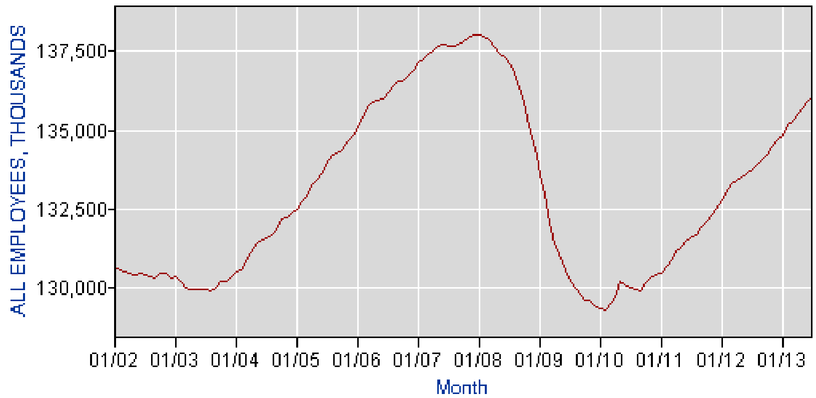
China Travel Trade Barometer 2012

Change in Bookings	1st Qtr 2013				2nd Qtr 2013 (P)				3rd Qtr 2013 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S. Mainland only	Increased 10% to 15%	82%	5%	14%	Higher	86%	14%	0%	Higher	86%	9%	5%
California	Increased 4% to 9%	82%	9%	9%	Higher	86%	14%	0%	Higher	86%	9%	5%

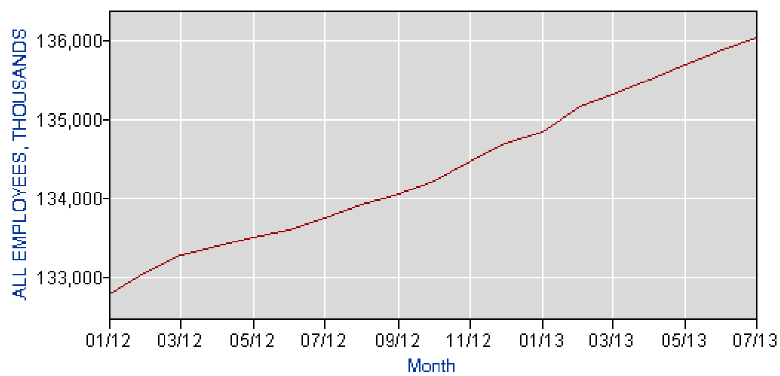
Note: 1. Respondents include members of wholesale and retail travel companies, airlines, tour operators, travel agents and publishers and marketing and promotion companies. 2. AS refers to 'About the Same', NC refers to 'No Change' and MH refers to 'Much Higher'. Source: Office of Travel and Tourism Industries

ECONOMIC INDICATORS: *DOMESTIC*

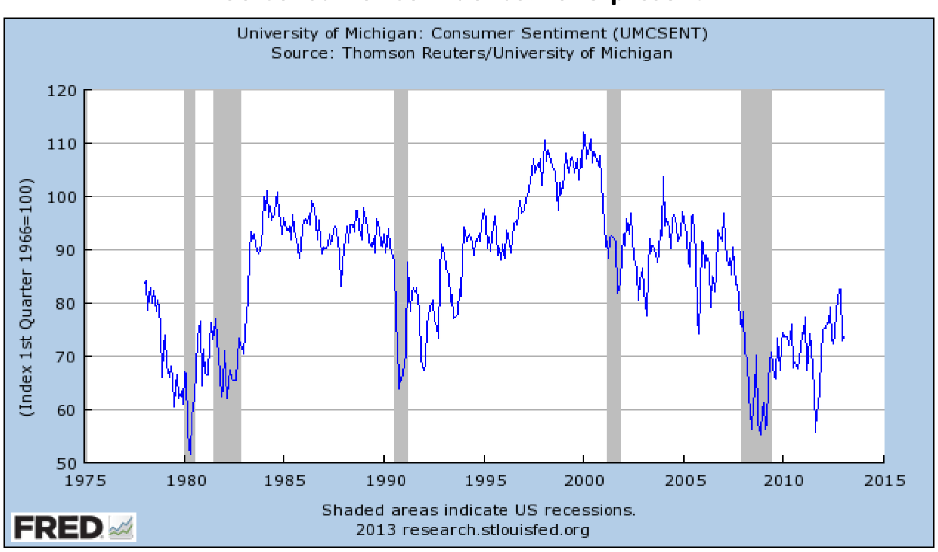
US Work Force: 2003-present



US Work Force: 2012-present

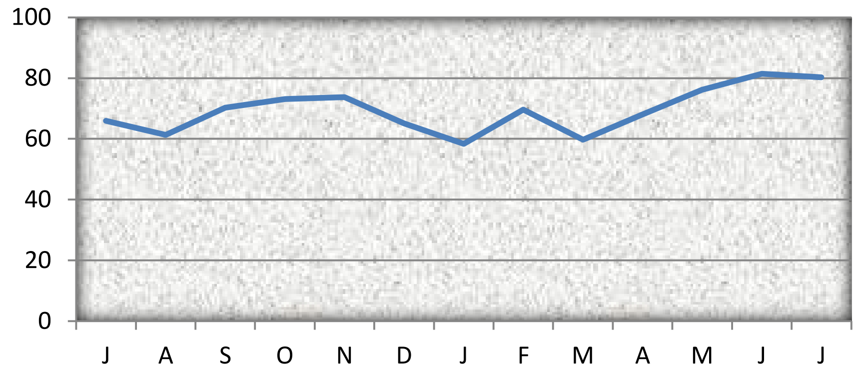


US Consumer Confidence: 1978-present

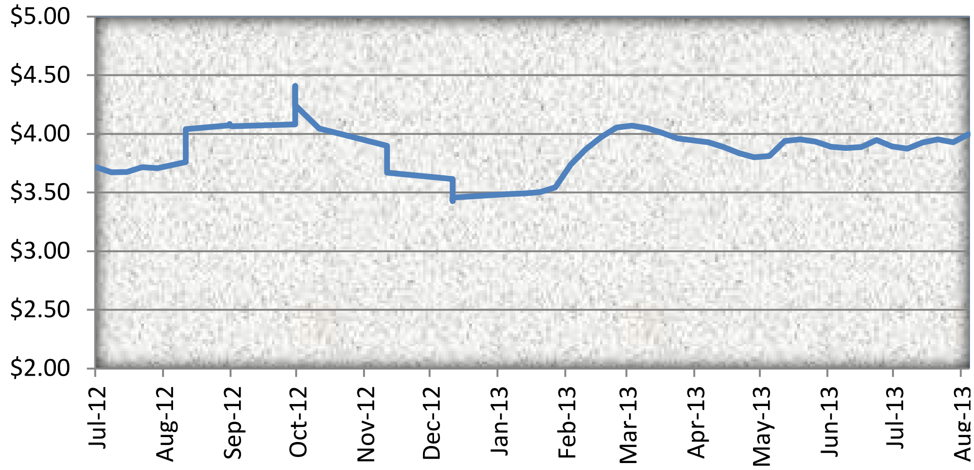


Sources: Bureau of Labor Statistics; Survey Research Center: University of Michigan

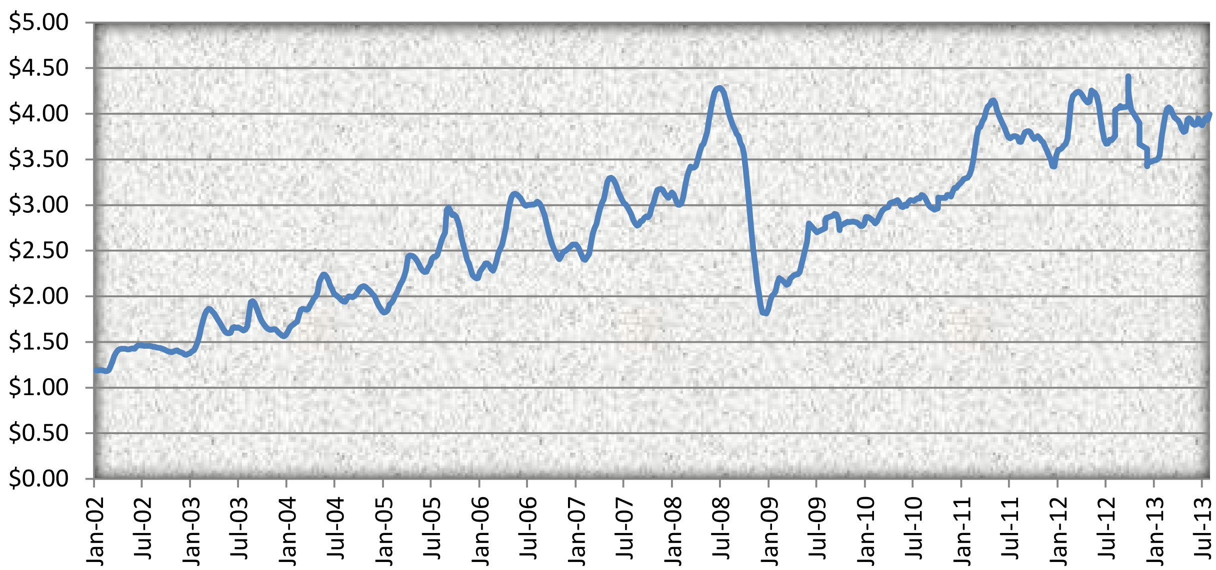
US Consumer Confidence Last 12 Months



West Coast Gas Prices: Last 12 Months



West Coast Gas Prices: 2002-Present



Sources: The Conference Board, Energy Information Administration

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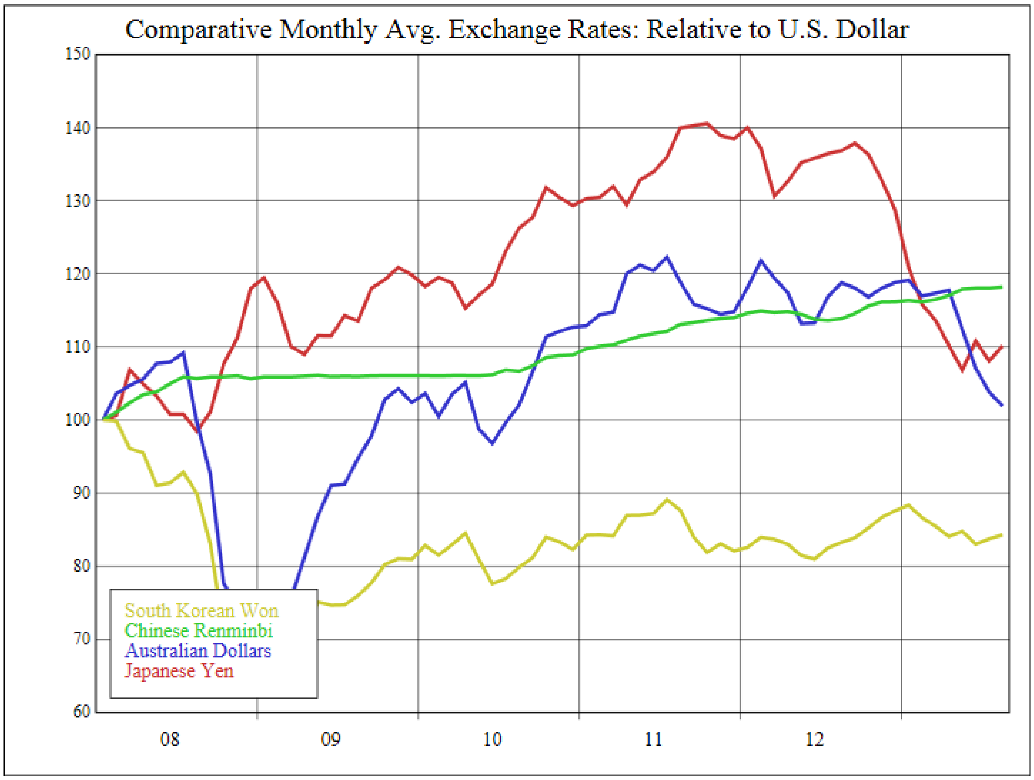
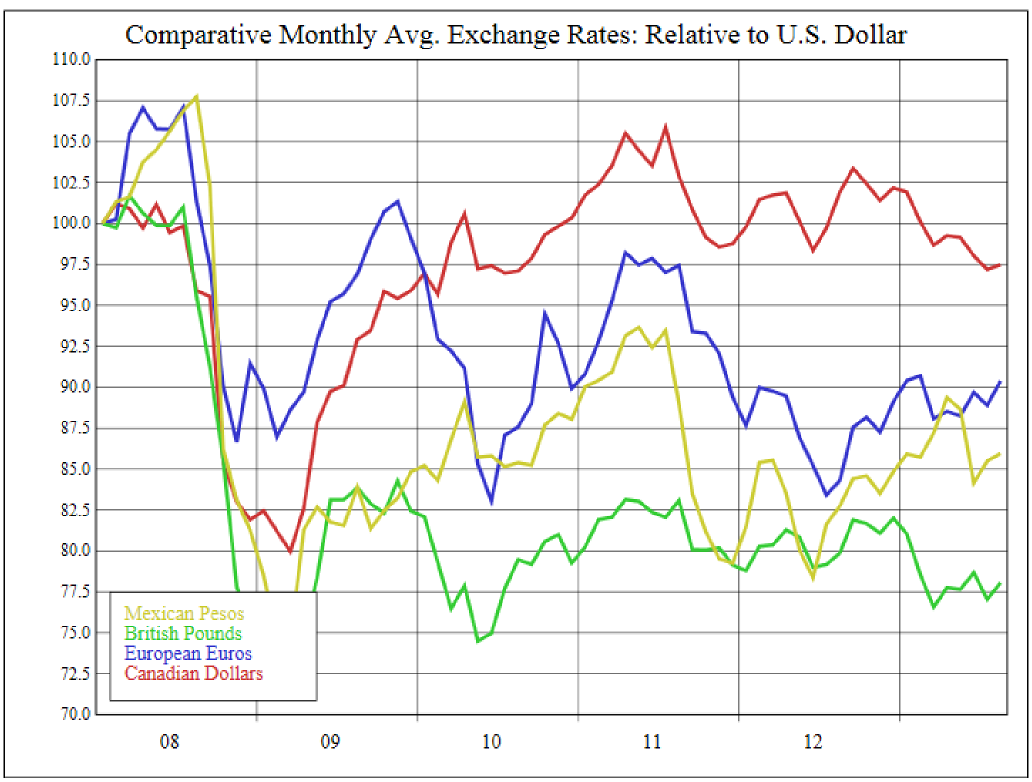
Exchange Rate

Relative Change Since 2008





Source: Pacific Exchange Rate Service – Prof. Werner Antweiler

August 2013
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International Non-Stop Flights and Seats

Monthly Totals, California's Top Markets

Overseas Air Service into California, August 2013	Australia	Brazil	China	France	Germany	Italy	Japan	S. Korea	UK
Non-Stop Flights									
LAX	242	14	186	103	124	31	265	155	248
SFO	31	0	124	102	124	0	186	124	155
SAN	0	0	0	0	0	0	31	0	31
SJC	0	0	0	0	0	0	31	0	0
Total CA	273	14	310	205	248	31	513	279	434
Non-Stop Seats									
LAX	91,567	4,074	59,496	35,843	43,586	9,083	71,990	52,245	81,925
SFO	11,594	0	41,780	25,999	48,980	0	49,643	38,582	56,103
SAN	0	0	0	0	0	0	5,766	0	9,243
SJC	0	0	0	0	0	0	4,898	0	0
Total CA	**103,161**	**4,074**	**101,276**	**61,842**	**92,566**	**9,083**	**132,297**	**90,827**	**147,271**
Non-Stop Seats: Yr/Yr % Chg									
LAX	**4.8%**	**4.1%**	**10.2%**	**3.4%**	**13.6%**	**0.7%**	**-17.9%**	**-6.2%**	**5.5%**
SFO	**0.0%**	**na**	**31.1%**	**9.8%**	**-3.3%**	**na**	**-3.8%**	**-0.7%**	**1.4%**
SAN	**na**	**na**	**na**	**na**	**na**	**na**	**na**	**na**	**11.7%**
Total CA	**4.2%**	**4.1%**	**17.9%**	**6.0%**	**4.0%**	**0.7%**	**-5.0%**	**-3.9%**	**4.3%**

International Air Service into California, August 2013	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**	60	8,582	**14.2%**
LAX	854	110,940	**12.9%**	1,070	156,206	**16.3%**
OAK	4	888	**0.0%**	61	9,054	**10.3%**
ONT	0	0	**na**	22	2,960	**-13.8%**
PSP	13	1,768	**-6.4%**	0	0	**na**
SAN	53	6,712	**-30.0%**	128	18,488	**37.0%**
SFO	776	83,984	**0.5%**	312	44,831	**-3.1%**
SJC	0	0	**na**	88	13,861	**58.4%**
SMF	0	0	**na**	49	7,034	**36.3%**
SNA	31	4,216	**-50.0%**	134	19,164	**125.6%**
Total CA	1,731	208,508	**2.9%**	1,924	280,180	**18.9%**

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

FORECAST: *INTERNATIONAL*

Annual International Leisure Trips to California (Annual % change)	2010	2011	2012	2013	2014	2015	2016
Total	10.6%	6.0%	2.5%	4.5%	5.1%	5.5%	5.6%
China	49.1%	34.8%	38.8%	13.8%	15.1%	16.3%	14.0%
India	17.2%	8.7%	7.0%	7.3%	7.5%	9.0%	9.6%
Japan	19.3%	5.4%	5.2%	3.3%	4.6%	5.2%	5.3%
South Korea	40.8%	-0.5%	-0.3%	4.8%	6.3%	7.5%	8.9%
Australia	33.2%	-2.2%	-3.0%	4.5%	6.9%	7.4%	6.1%
United Kingdom	3.0%	-3.0%	-3.9%	1.1%	1.5%	1.5%	2.8%
Germany	9.3%	3.1%	-0.6%	3.8%	4.1%	4.6%	5.3%
France	38.8%	17.0%	-16.9%	0.8%	1.3%	2.0%	2.4%
Scandanavia	21.3%	4.5%	5.6%	0.7%	0.8%	1.2%	3.1%
South America	20.2%	19.9%	16.0%	6.5%	7.1%	8.8%	11.8%
Canada	10.0%	6.4%	3.6%	3.8%	4.1%	4.0%	4.0%
Mexico	5.3%	8.5%	1.9%	4.4%	4.9%	5.0%	5.2%
Rest of World	11.8%	-4.9%	5.3%	5.6%	6.5%	7.0%	5.9%

Source: Tourism Economics. Historical sources: CIC Research, OTTI

Note on volatility of historical data and treatment in forecast: Due to smaller sample sizes and relatively smaller visitor volumes in absolute terms, the historical data of origin markets tends to be more volatile than total visitor volumes.

TRAVEL/TOURISM NEWS & TRENDS

Skyscanner Poll Reveals That Men are Happy to Let Women Take Charge

Three quarters of women said they do most of the holiday research.

Travel companies need to appeal more to female travelers, after a new survey revealed that the vast majority of holidays are researched and booked by women.

The poll of 1,000 international travelers by search site Skyscanner revealed that almost three quarters of women said they do most of the research when it comes to planning a holiday, with just 9% claiming their partner does it.

Of the men who admitted their partner did the research, a third admitted their partner was better at it and could find better deals, while 10% said they were simply too lazy.

Approximately 20% of male respondents said they believe their partners enjoy doing the research more than they do, and a similar proportion thinks their partners are fussier. This was backed up by the fact that less than a quarter of female respondents said they would be happy to let their partner make all the holiday decisions. But men are apparently happy with this arrangement; 97% of male respondents said they were content with the status quo, while 95% of women agreed.

“Planning a holiday can provide lots of talking points and create lots of decision-making, particularly when it comes to spending money. The findings of our survey show us that, more often than not, it’s women who do the legwork and get the final say – and many laid-back men seem to be happy with this,” said Skyscanner spokesperson, Sam Poullain.

The Skyscanner survey backs up recent research by Amadeus, which identified females booking travel as one of its “Big Four Travel Affects.” Speaking with *Travel Daily* recently, David Brett, president of Amadeus Asia Pacific, said that the rise in travel websites and social media has led to a shift in the booking dynamic.

“Women tend to be a lot more detailed – they dig a bit deeper and ask more questions,” said Brett. “This is making the tourism providers think more about how they make their offers, making their products more attractive to a female booker. So in future, the more information the supplier is able to provide to the customer, the more they are able to tailor their products to the individual, the more successful they will be. A lot of this will be driven by social media.”

Travel Daily

Consumer Trends/News

- For Growing Ranks of the Wealthy, Travel Is a Priority - “Leisure is an unwavering, trend-proof, recession-resilient status symbol. What shifts is the choice of travel companion, destination and experience,” according to the study – Travel Market

Travel Trends/News

- Tablets Grab Significant Share of Travel Traffic - Tablets overtake smartphones for hotel website traffic - eMarketer
- Travel retailing in 2023 – a brief look into the future – Tnooz

Group/Business Trends/News

- BTN's 2013 Business Travel Survey: business travel's slow growth gives way to an uncertain 2013

International

- Top 20 countries fueling U.S. tourism: Asia and Latin America on the rise, Europe in decline – Skift
- China’s rising consumer class – Video: China’s next chapter: The rise of the Generation-2 consumer - McKinsey & Company