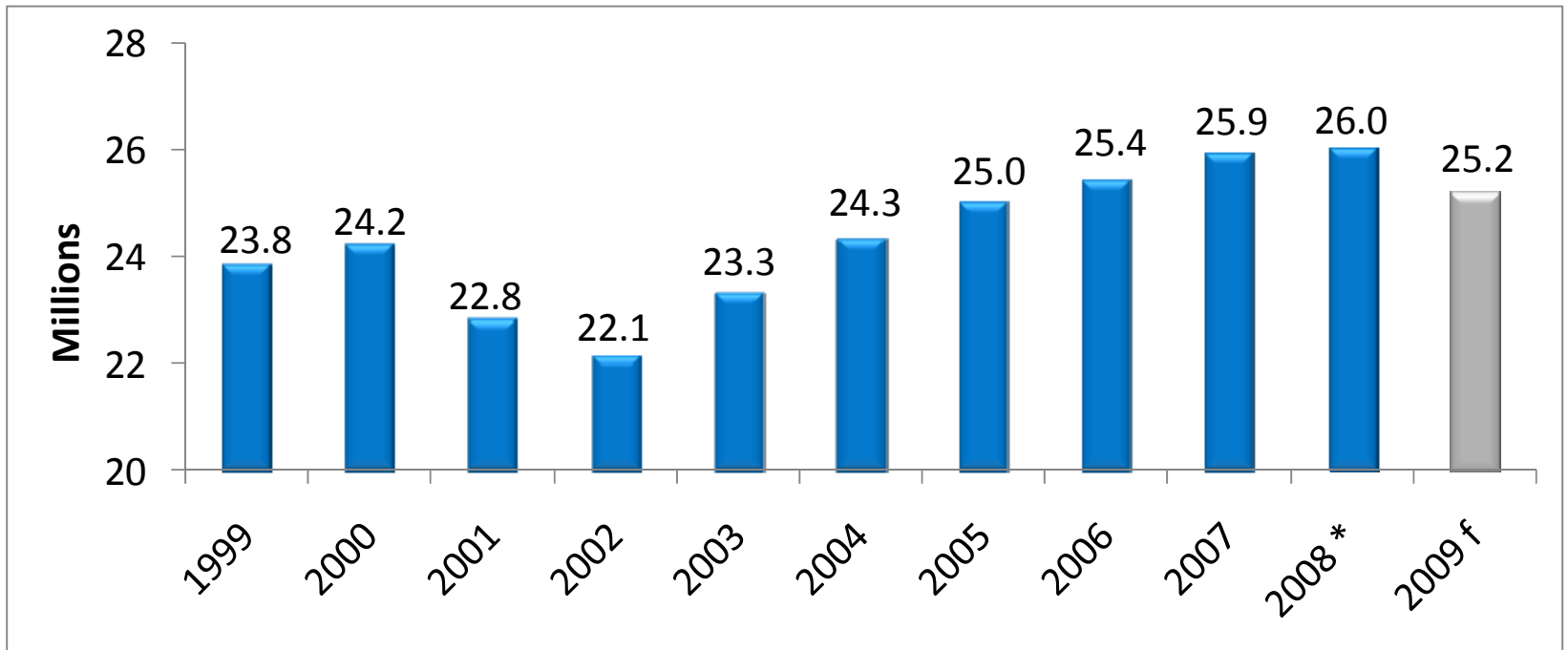


Tourism In Los Angeles

Update

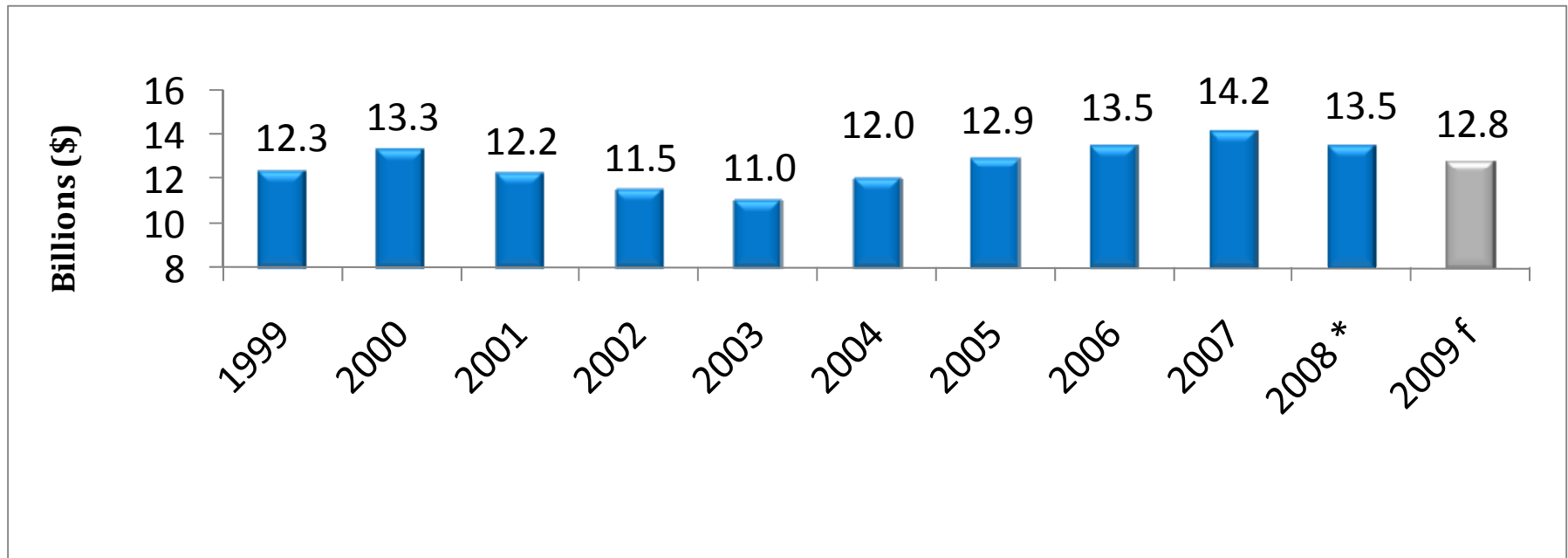
November 2008

Following Record Breaking Years LA Visitation Expected to Decline

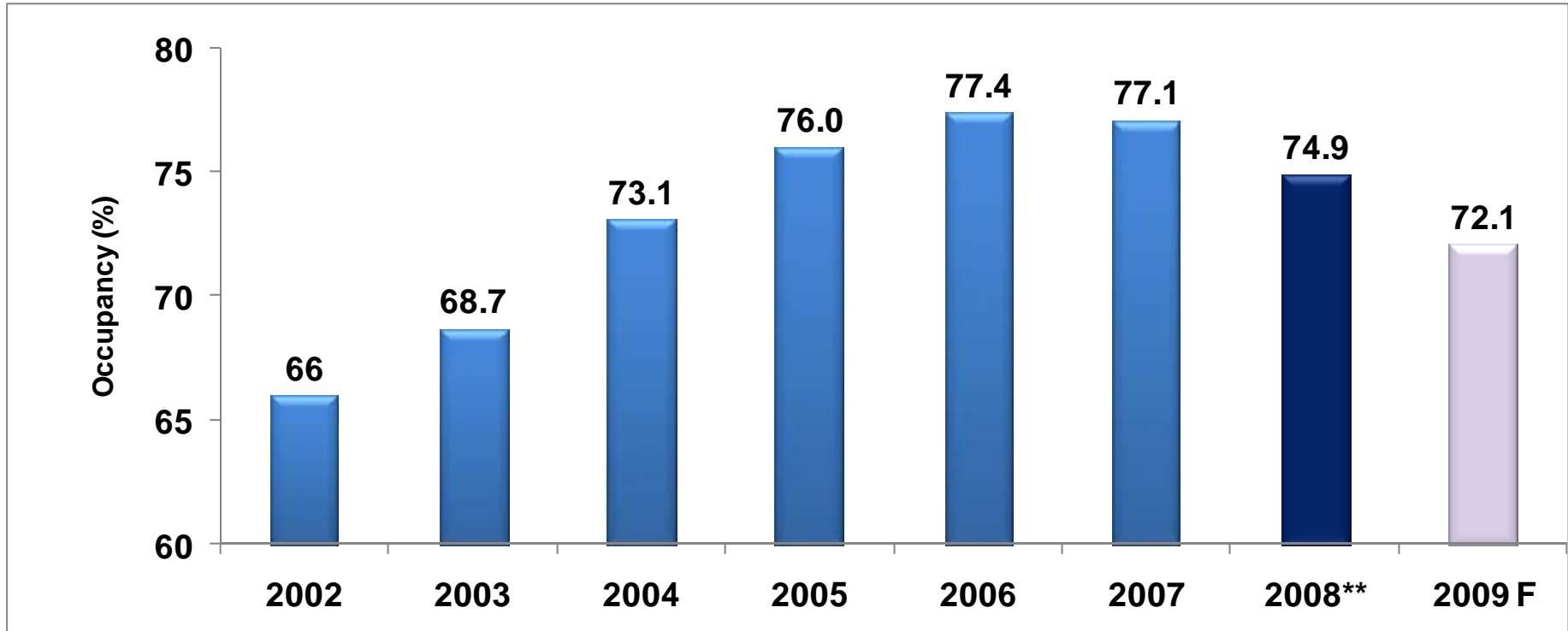


Having Steadily Increased From 2003

Visitor Spending Projected to Decrease

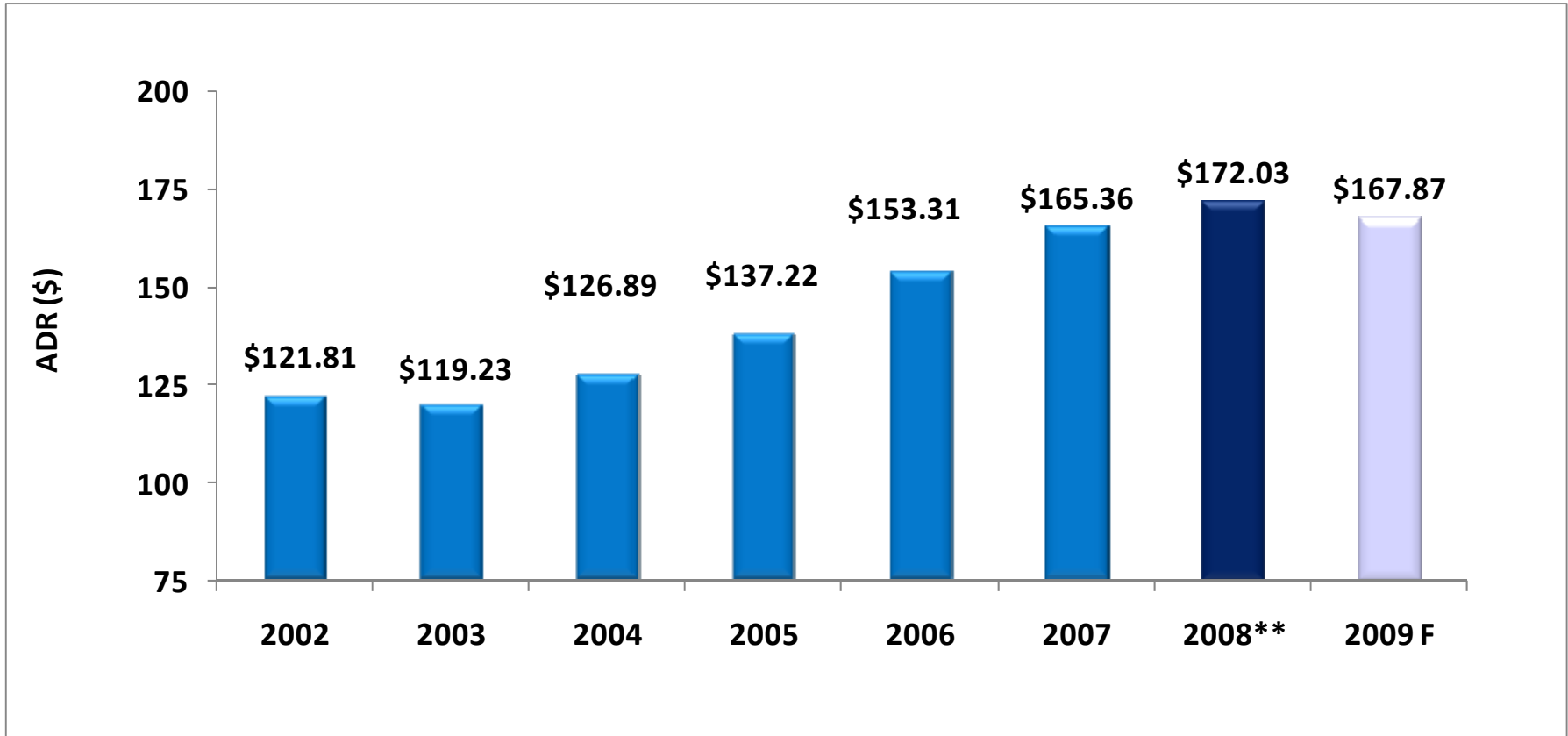


LA County Hotel Occupancy Drops as Economy Weakens



Source: PKF
** Year End Estimate

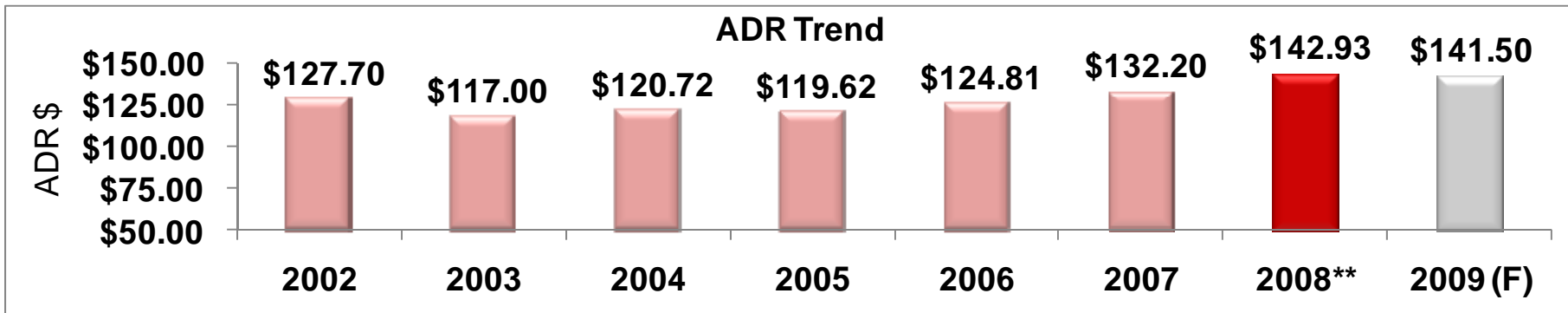
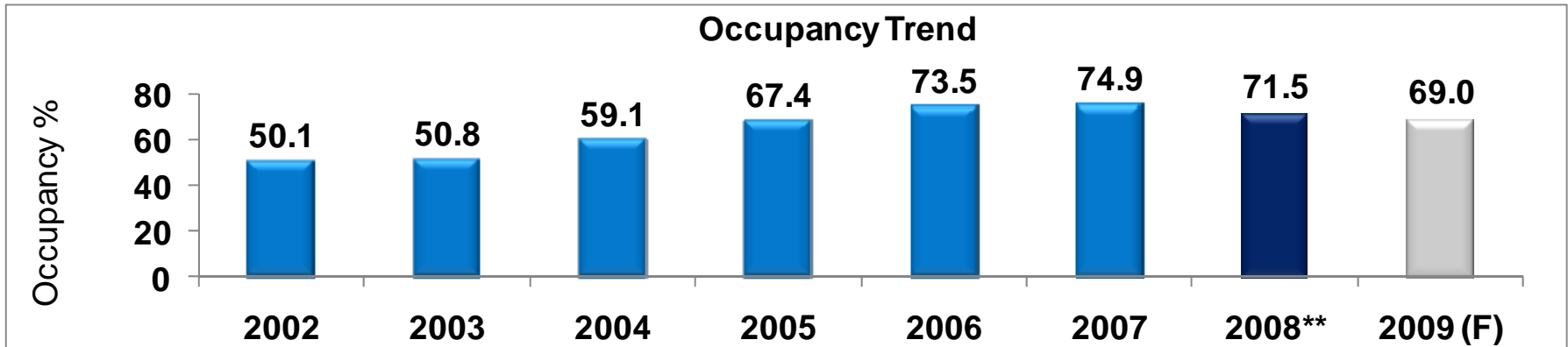
LA County Room Rates Expected to Slip in 2009



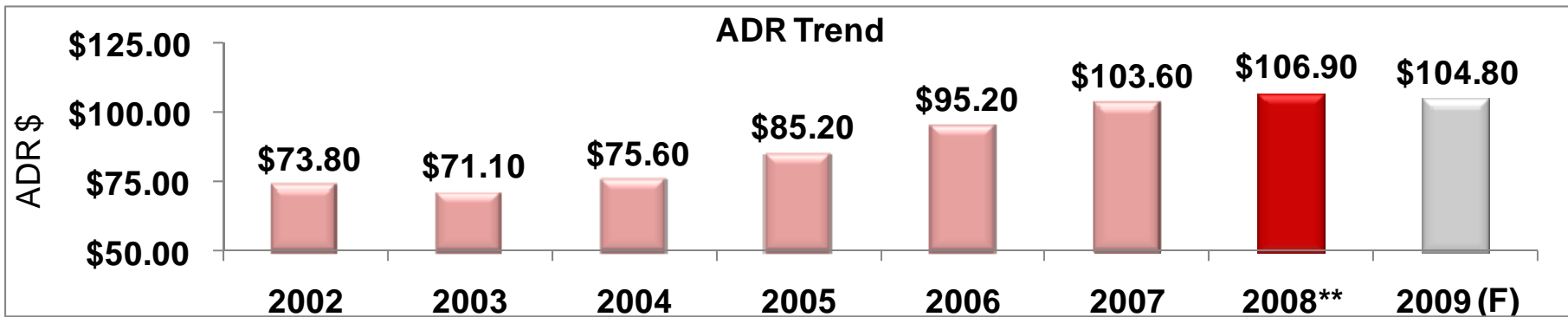
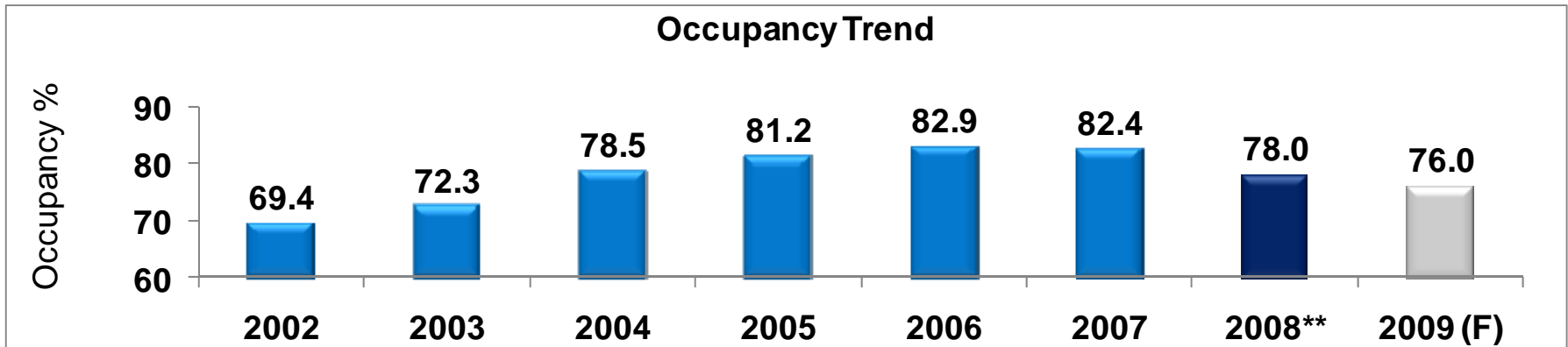
Source: PKF

** Year End Estimate Nov 08

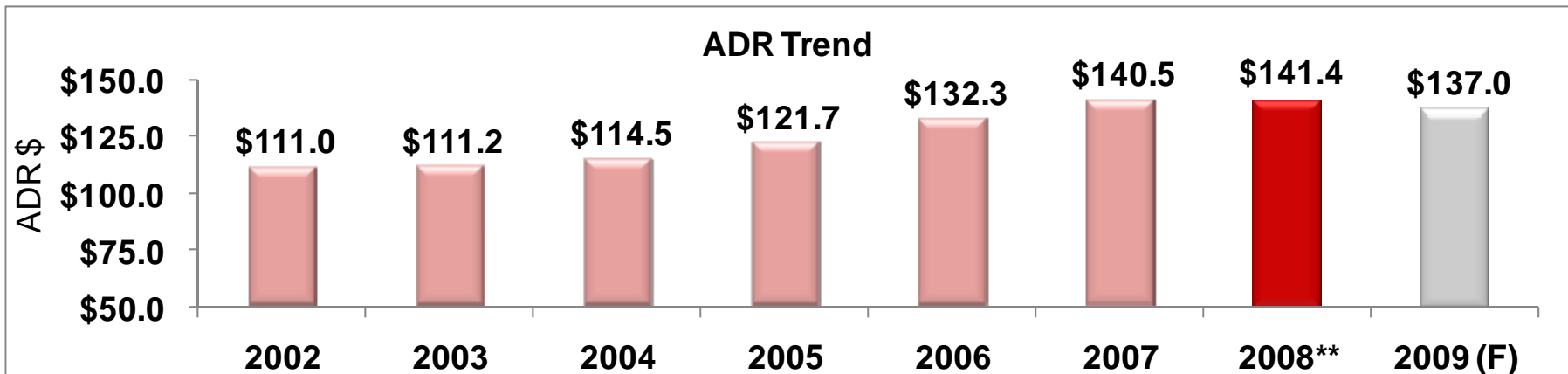
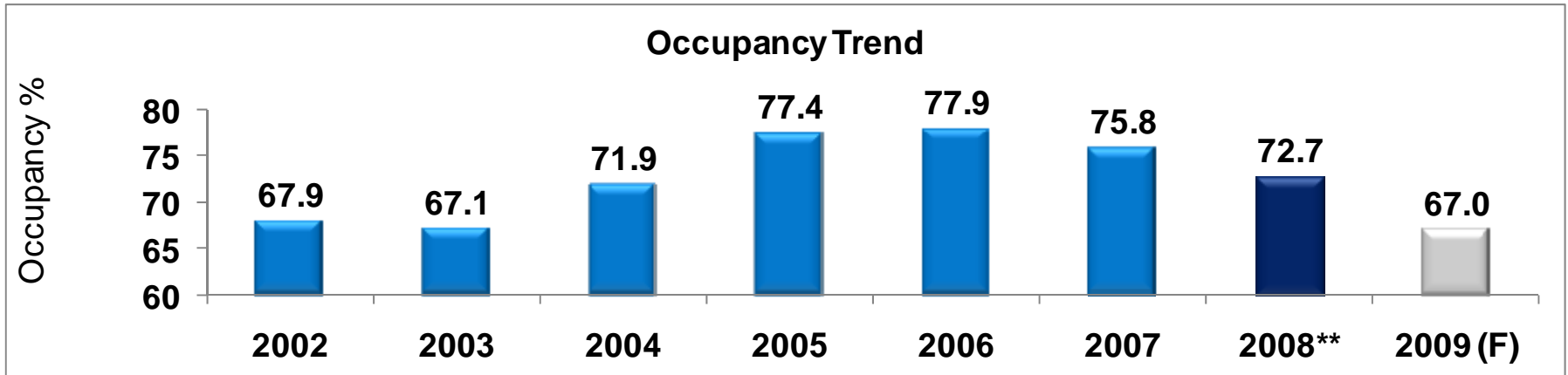
Occupancy & ADR Trends and Forecasts Downtown Los Angeles



Occupancy & ADR Trends and Forecasts LAX Airport Area



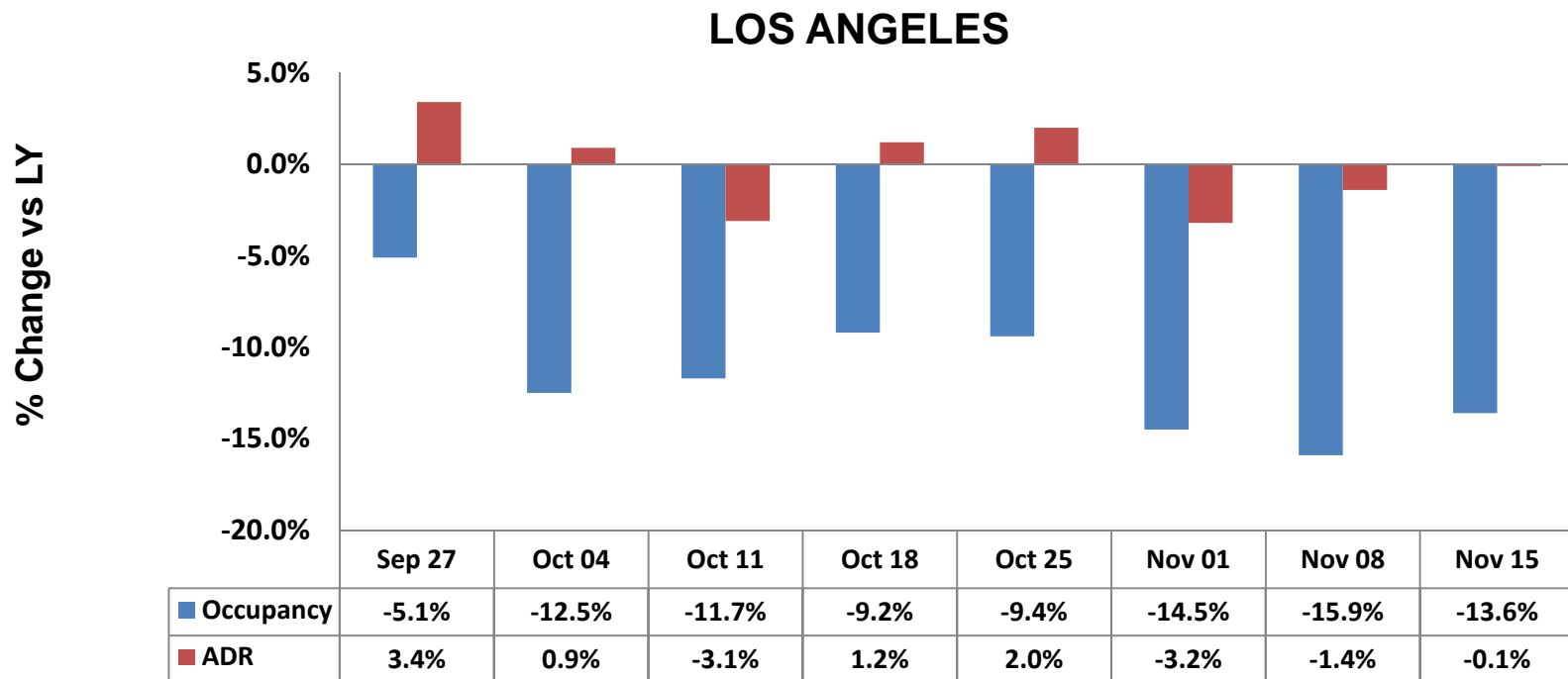
Occupancy & ADR Trends and Forecasts San Fernando Valley Area



Weekly Lodging Trend- Los Angeles County

Occupancy & Room Rates

Period: Weekending 27Sep-15 Nov 2008

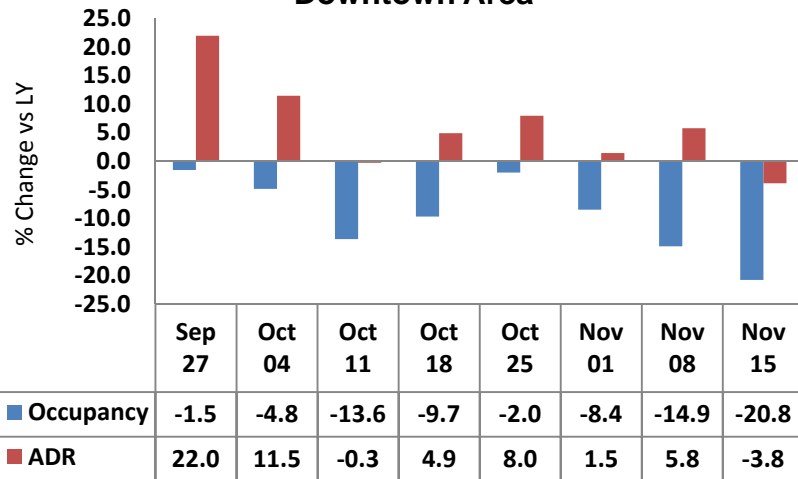


Weekly Lodging Trend- Los Angeles Regions

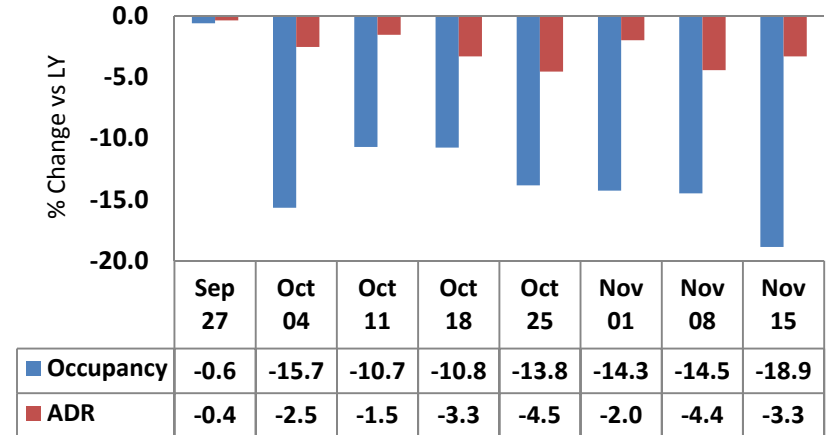
Occupancy & Room Rates

Period: Week Ending 27th Sep- Week Ending 15th Nov

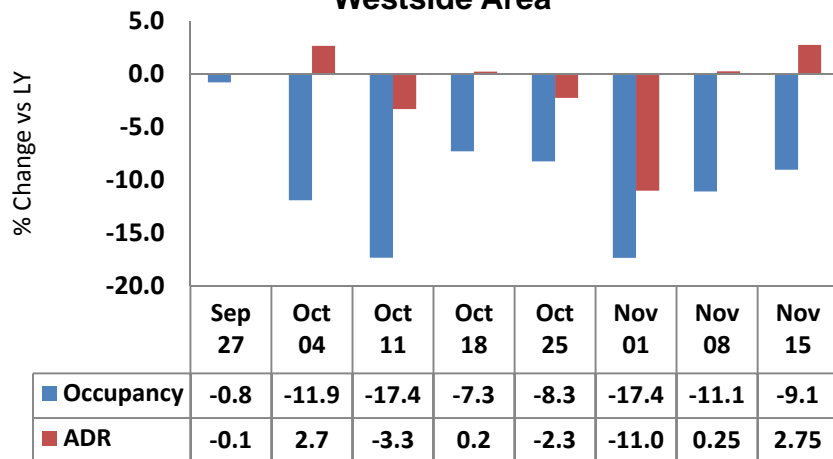
Downtown Area



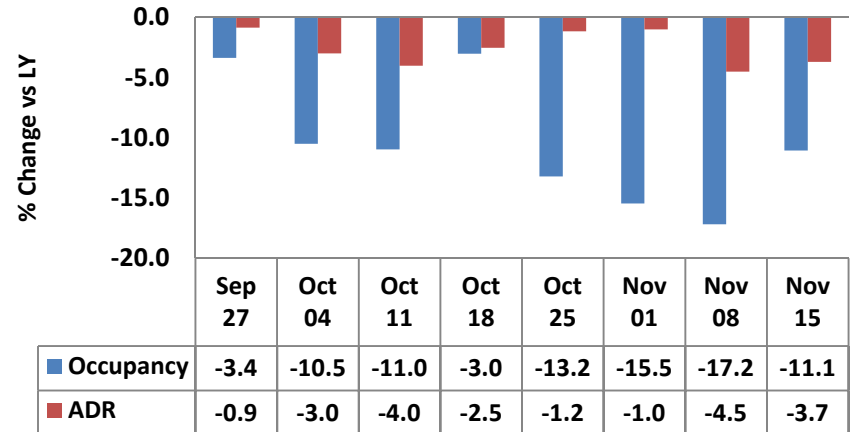
LAX /Airport Area



Westside Area

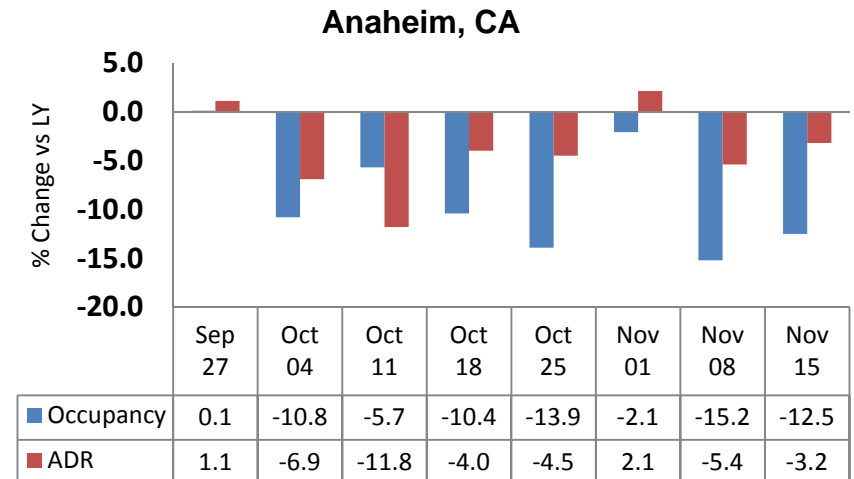
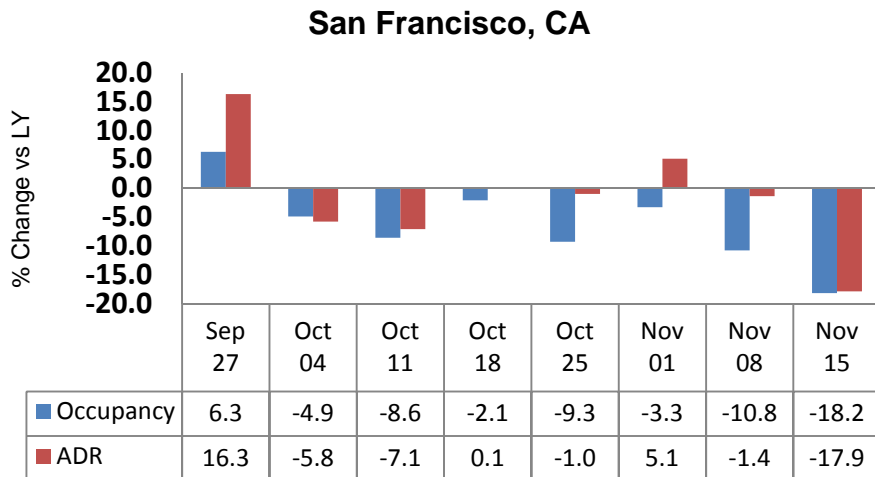
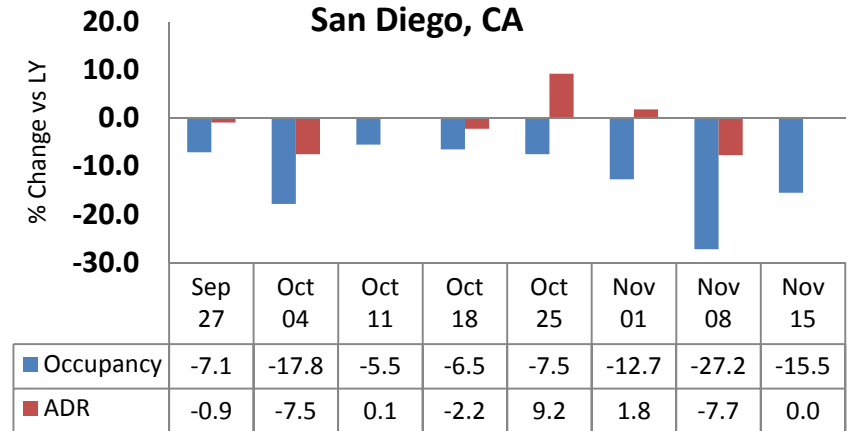
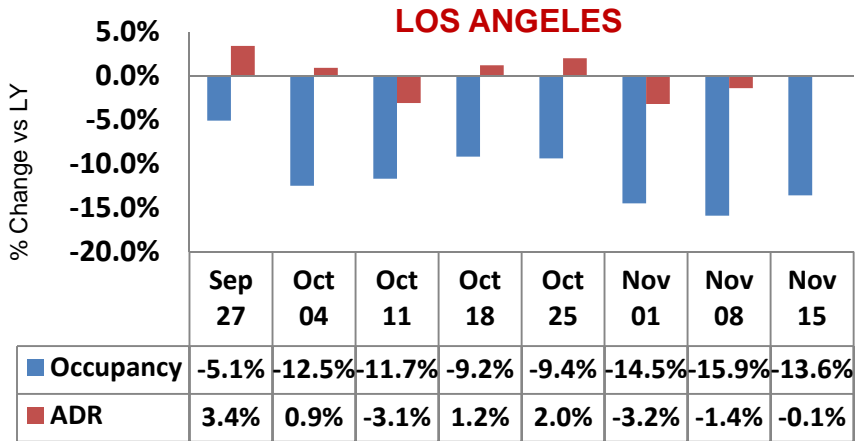


SFV Area



Weekly Lodging Trend- Los Angeles & Major Cities in California Occupancy & Room Rates

Period: Week Ending 27th Sep- Week Ending 15th Nov

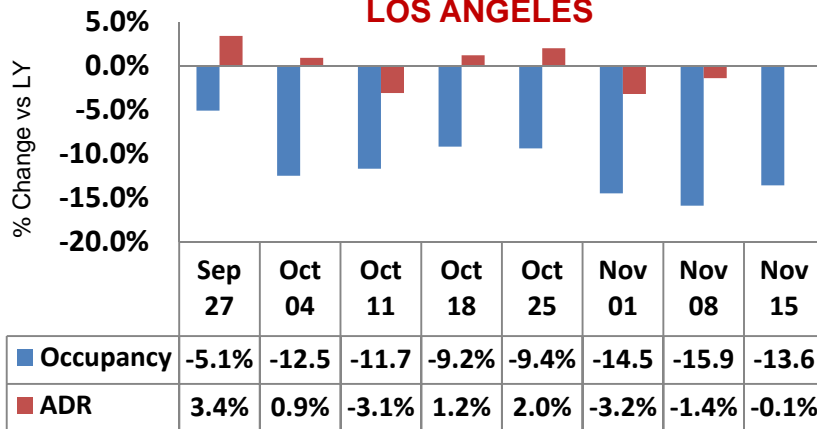


Weekly Lodging Trend- Los Angeles & Major U.S Markets

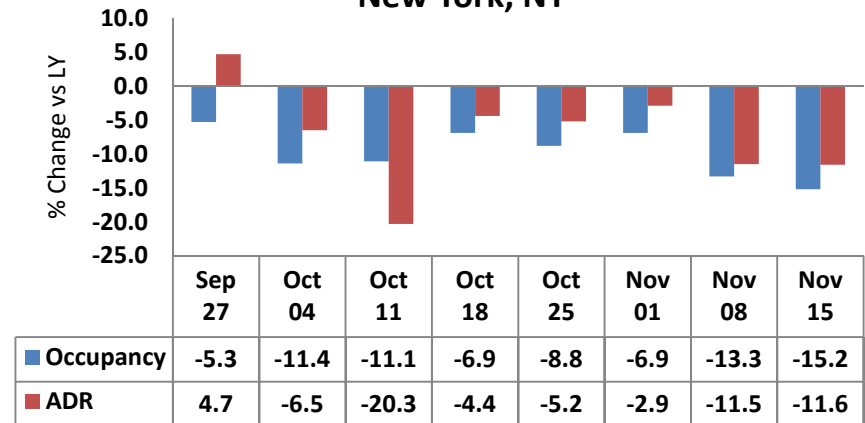
Occupancy & Room Rates

Period: Week Ending 27th Sep- Week Ending 15th Nov

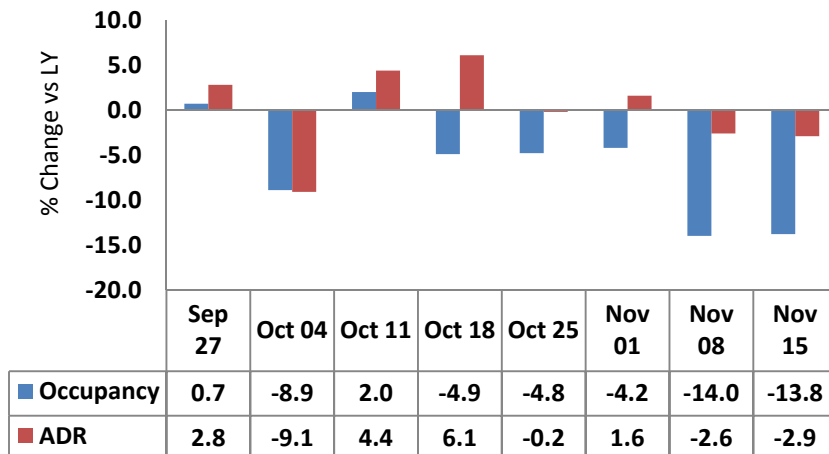
LOS ANGELES



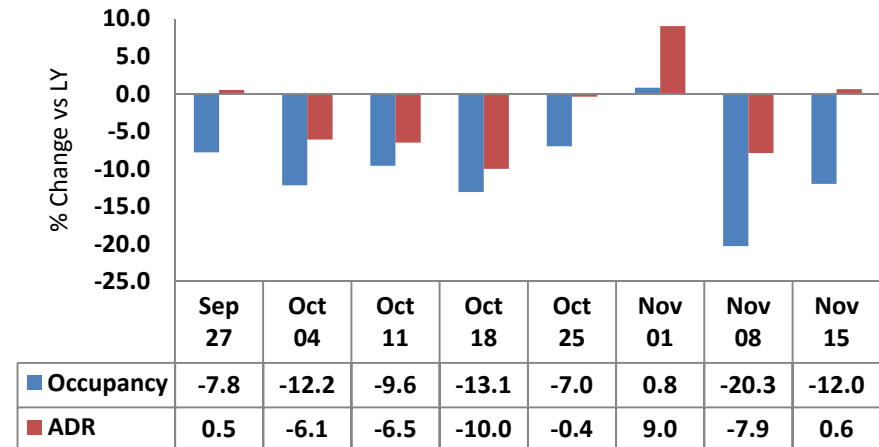
New York, NY



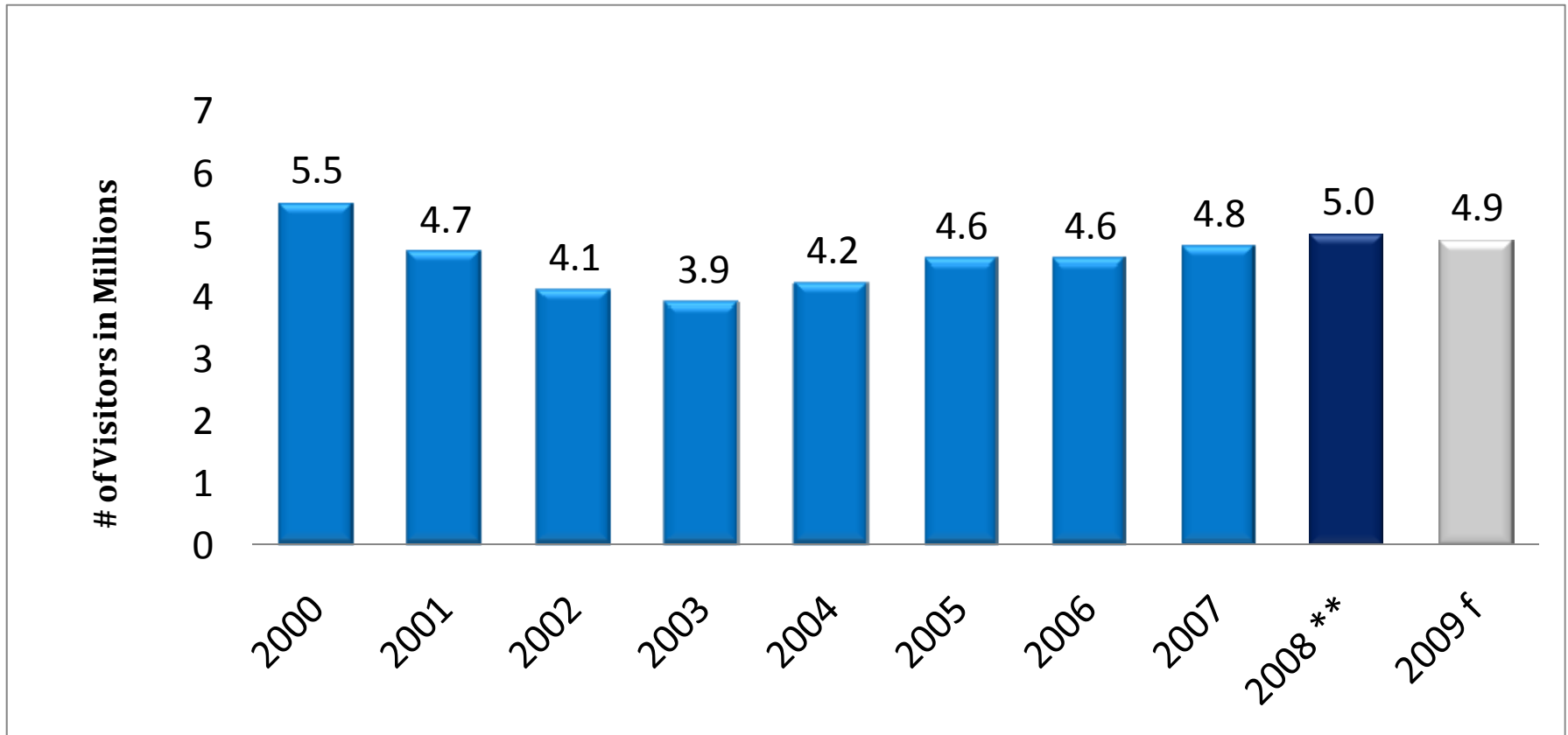
Dallas, TX



Chicago, IL



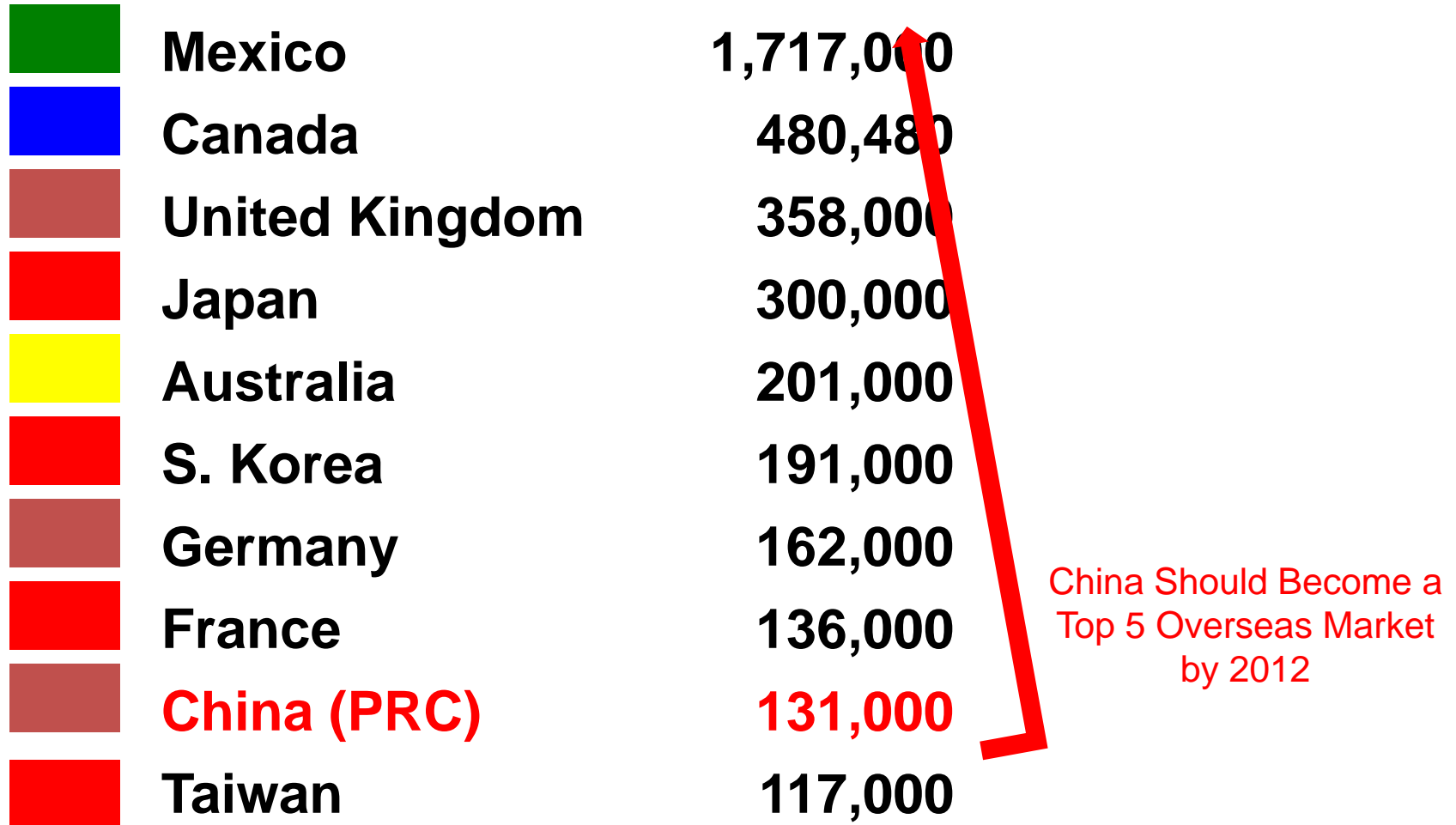
International Visitation Has Been The Bright Spot, But Expected To Slow in 2009



Source: CIC Research

** Year End Estimate

Top International Visitor Markets

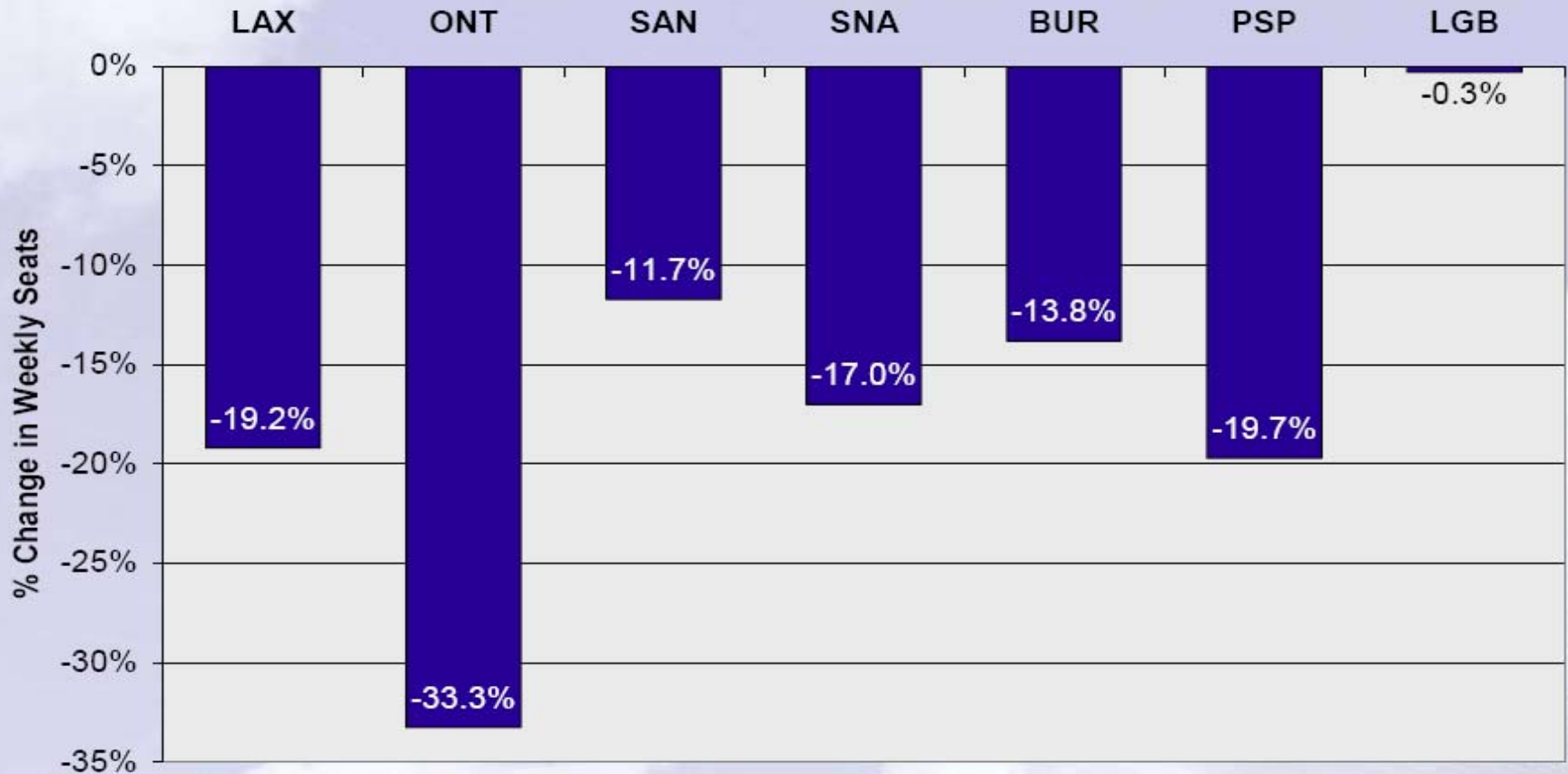


Visa Waiver

- **Countries whose citizens don't need visas to travel to the US**
- **Maximum 90 day stay**
- **Travel for business or leisure**
- **27 countries currently part of program**
- **Nov 2008 - Visa Waiver Implemented in South Korea**

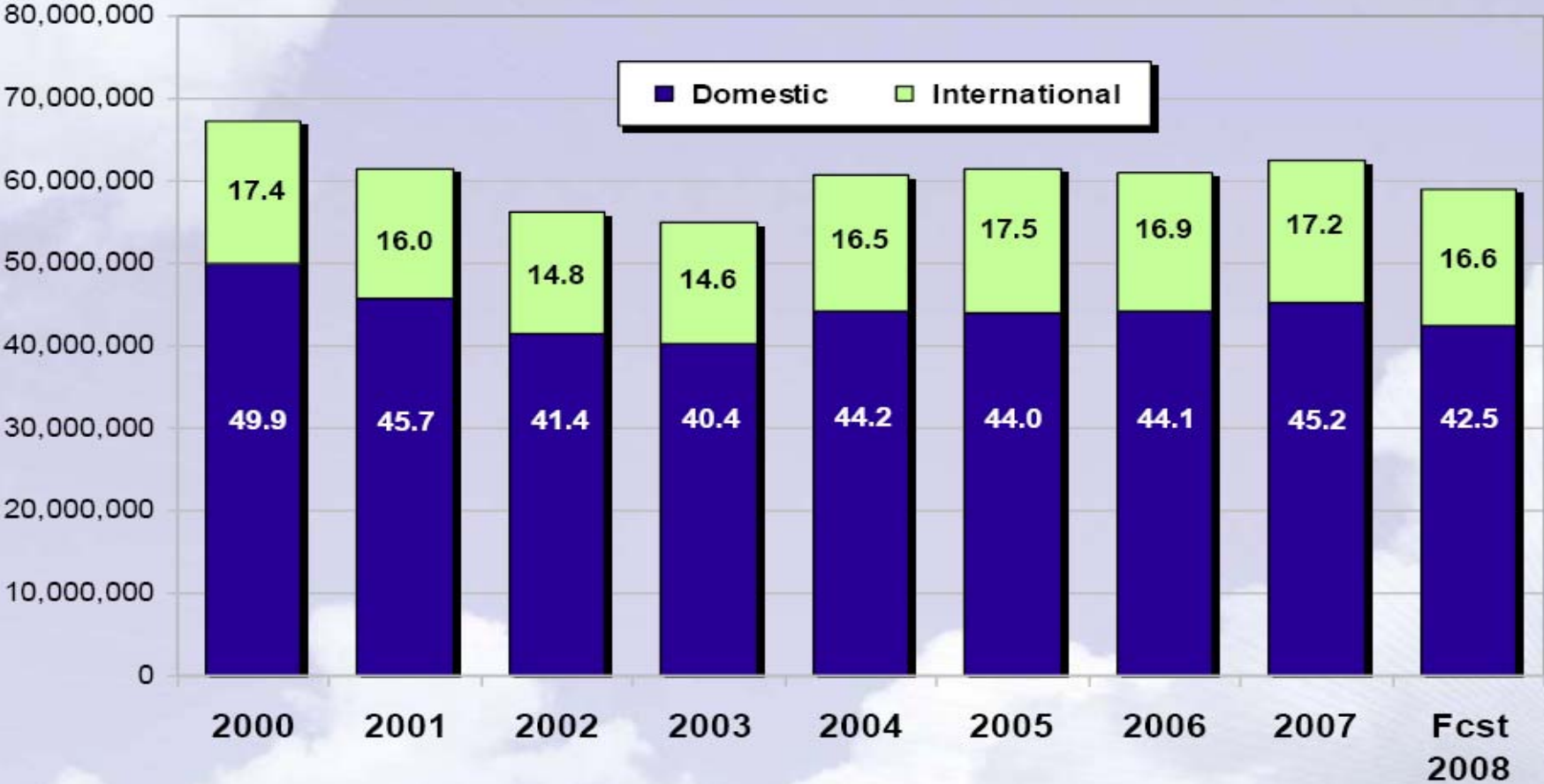
Changes in Weekly Capacity at Southern California Airports

Service Changes at Southern California Airports
Percent Change in Weekly Seats
December 2007 vs. December 2008



2008 LAX Passenger Traffic has Declined

LAX Total Airport Passengers
CY 2000 – CY 2008

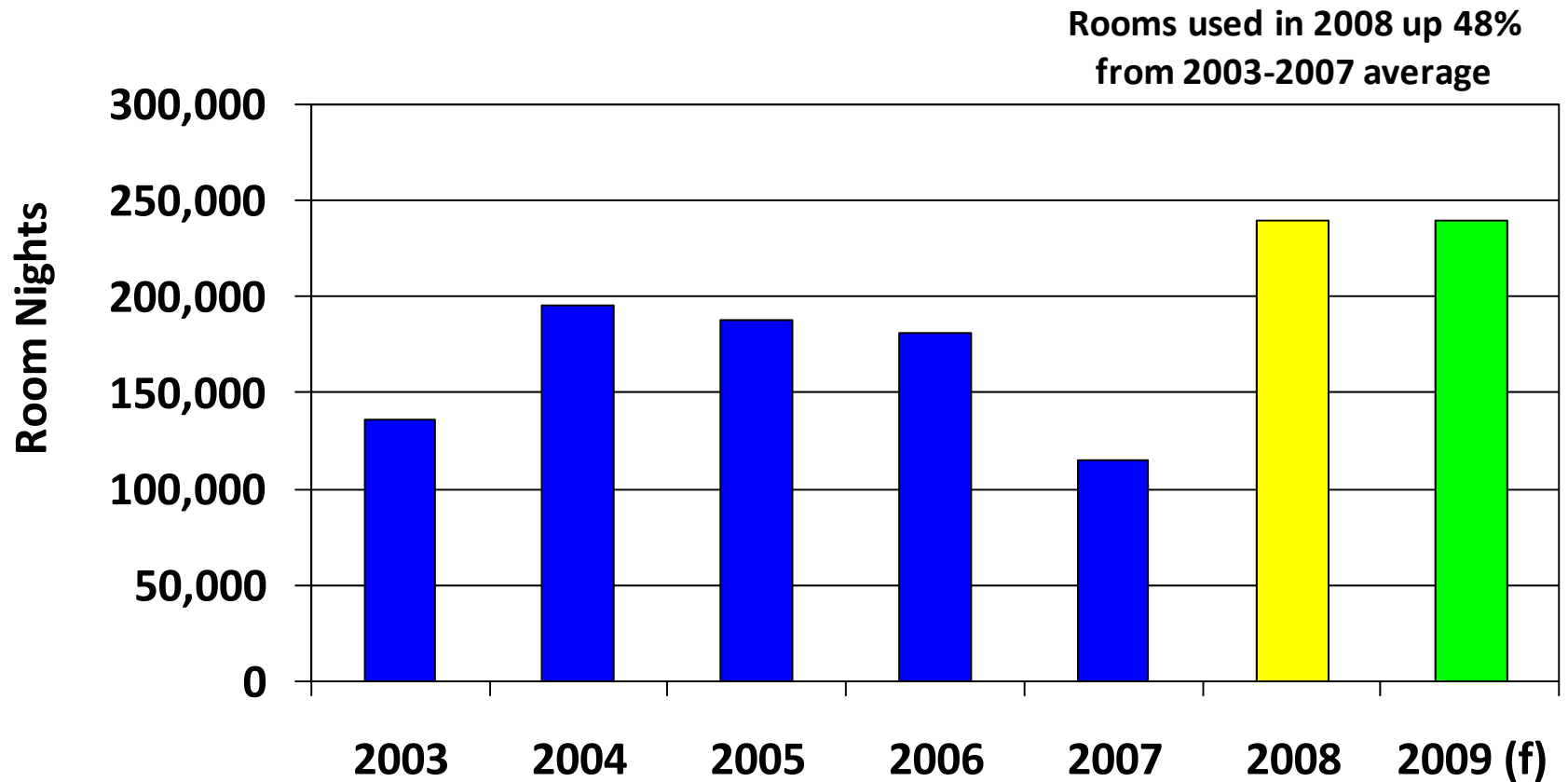


Source: LAWA

New Air Service Acquired in 2008

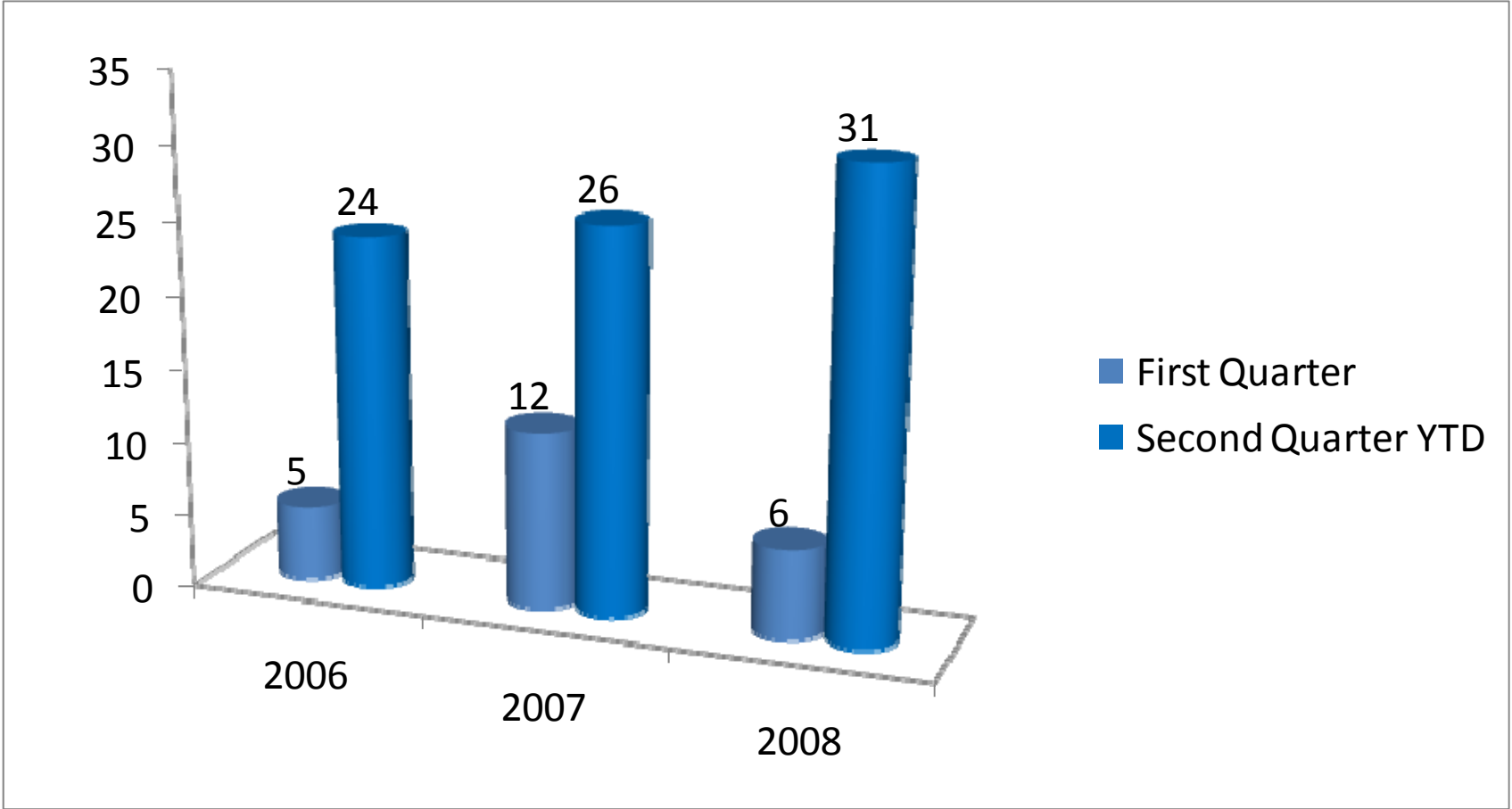
<u>Carrier</u>	<u>Market</u>	<u>Launch Date</u>
Qantas	Brisbane	March 2008
Air France	London	April 2008
Alitalia	Rome	June 2008
Eva Air	Osaka	June 2008
Air Berlin	Dusseldorf	June 2008
Korean Air	Sao Paulo	June 2008
Emirates Airlines	Dubai	Sept 2008
V Australia	Sydney	Jan 2009
V Australia	Brisbane	Feb 2009

Citywide Conventions have Significantly Increased

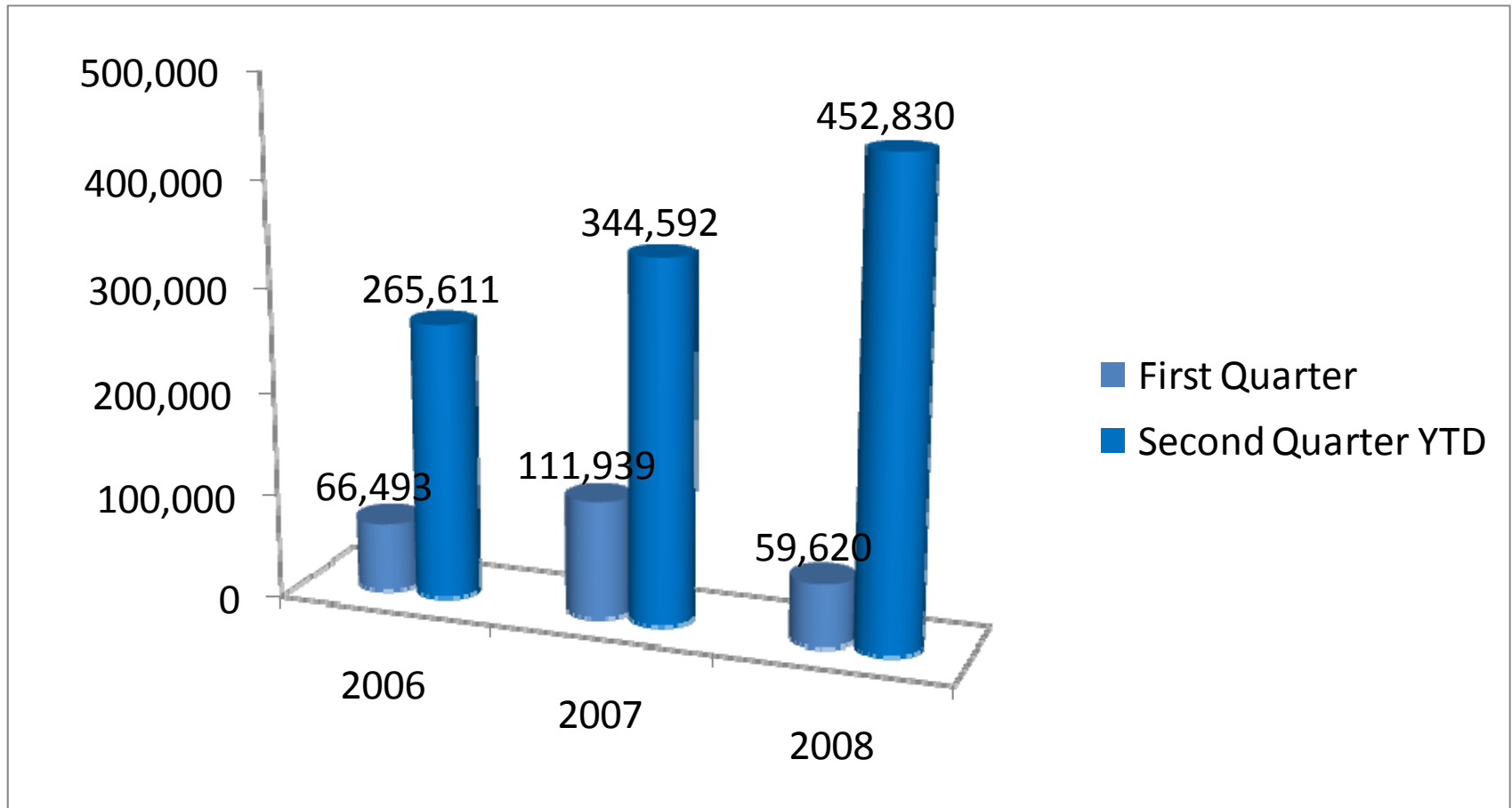


Conventions	2003	2004	2005	2006	2007	2008	2009 (f)
	16	15	13	15	13	21	22

Future Citywide Convention Bookings Are Strong



Room Nights for Citywide Convention Bookings Continue to Increase



Marketing Update

Green Seal Certification

- Hotel Green Certification plan is supported by:
 - City of LA (Environmental Affairs Department)
 - LA INC
 - Green Seal
 - Green LA Coalition
- LA INC signed agreement with Green Seal
 - Non-profit organization
 - Founder of California Lodging Program
 - Working with big brands ie: Hilton, Marriott
 - Launched similar partnership with Chicago hotels
- Hotel Orientation – December





dineLA   **JULY 2008**

A Full Serving Of LA's Best Restaurants
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Welcome to the dineLA e-newsletter, your guide to what's cooking in Los Angeles. Sign up today for your chance to win a private chef's tour of the Hollywood Farmers' Market with Chef Eric Greenspan followed by his four-course Market Menu for two at The Foundry on Melrose

OFF DI-VINE INSPIRATION
 By Steve Couiter

Chef Michael Cimarruti
 Every Saturday Angeli Caffé chef/owner Evan Kleiman hosts "Good Food" on KCRW, a one-hour celebration of culinary culture. In a popular weekly segment, Kleiman sends reporter Laura Aveni to check in with vendors at the Santa Monica Farmers' Market and see what will soon be cropping up on menus around LA.

"The Market Report" easily dishes out some of the most informative few minutes of radio programming in LA, and it has helped expose countless foodies to the world-class Westside market. But the skyrocketing popularity of both the Wednesday and Saturday Santa Monica markets has left some chefs — and their ravenous devotees — hungry for something a little more lowkey.

CHEF VIDEO
 Chef Eric Greenspan of The Foundry on Melrose takes us into the strange and wonderful world of Pancake Lasagna.

SIP, SIP HOORAY
 With the 5th Annual Central Coast Wine and Food Celebration rolling back into Wally's "big top"-tented parking lot on August 3rd, the Westside is gearing up for one of the best local foodie and wine events in town. Sponsored by *Angeleno Magazine*

wine dineLA 2008
 presented by American Express

FOOD & WINE EVENTS
 AUGUST 3
 Wally's 5th Annual Central Coast Wine & Food Celebration
 AUGUST 18
 Club Culinnaire's "Chef a Table" at Grace Restaurant
 AUGUST 31
 5x5 Chefs Collaborative Dinner at Water Grill

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- Targets Visitors & Locals
- 2000 + Restaurant Database

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Celebrity Chef Profile Series
 Susan Fenger and Mary Sue Miller - chefs, restaurateurs, cookbook authors, radio and TV personalities - spice up the city.

Original LA Cuisine
 You've been to the beach, seen the Getty, strolled down the Hollywood Walk of Fame, and even spotted a celebrity. But have you had a chance to enjoy LA's original cuisine?

Why Join DineLA?
 With the growing impact of "foodie" tourism, or visitor's who travel for specific culinary experiences, Los Angeles is looking to draw attention to its rich, diverse restaurant scene.

name of restaurant
 Choose cuisine
 Choose price range
 Choose engines

find LA's hottest dining spots in:
 Beverly Hills, Culver City, Hollywood, Santa Monica, Venice, Burbank, Downtown, Echo Park, Malibu, Silverlake, West LA, Pasadena, North Hollywood, Studio City, Universal City, Woodland Hills

what's your dish...

Most Searched	What's New	Old Favorites
1. ACC	1. Cut	1. Spago
2. BNL BNAS	2. Harolds	2. Patina
3. BLD	3. Jollychop	3. Water Grill
4. C&D	4. Red Panel Italian	4. Park's
5. Fether's Office	5. Little Red Door	5. Teniro
6. Hopp Song	6. Blue Veibel	6. Mucico and Frank Grill
7. Hungry Cat	7. Eat on Sunset	7. Comrade
8. Pizzeria Mozza	8. Mozza	8. Melt Diner
9. Providence	9. Parc	9. Rocco's Chicken & Waffles
10. Romanov	10. BLD	10. The Luster

SO MUCH HAPPENED BEFORE DOROTHY DROPPED IN.

Restaurant Week - 2009

- January 25 – February 6, 2009 (Jan 31 excluded)
- 3 Menu Price Tier
- Media Partners:
 - Los Angeles Times
 - Clear Channel
 - KTLA
- Time Line:
 - November 14 Enrollment Deadline
 - January 5 Advertising Begins
 - Mid January (*TBD*) Mayor's Press Conference



LA Arts Month – January 2009

- Collaborate with Cultural Affairs
- Target local & regional markets
- Drive traffic to cultural institutions
- Partner with Clear Channel
- Radio spots Jan 6-30
- 1000 admissions give-aways to visual & performing arts



discoverLosAngeles.com

- January launch
- Improved search capabilities
- Travelocity booking/package engine
- Increased ad revenue
- New image library for media/partners
- Re-launch expanded international sites
 - Spanish
 - Korean
 - Chinese
 - Japanese



Brand Manifesto

Los Angeles is like no other place on earth. It's big, sprawling, beautiful, raucous, outrageous, fun-loving and larger than life.

The spectacular weather gives us the freedom to do what we want, when we want. And the glamour and excitement of the movie industry rubs off on everyone and everything.

There is definitely an LA way of doing things and we're famous for it – whatever 'it' means.

There is an expression that has become part of the language because it captures that indefinable something that makes LA - LA.

Thank you