

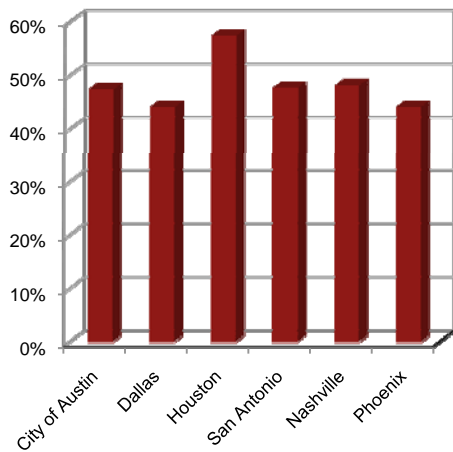
  
**CONVENTION AND VISITORS BUREAU**  
**MONTHLY INDUSTRY REPORT**

**Industry Report – January 2009**

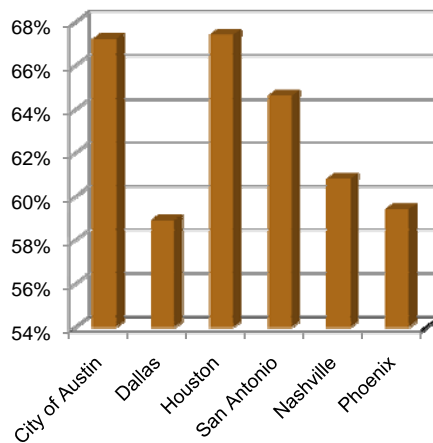
**Lodging Industry Report**

|                 | December 2008 |          |          |          |             |                | December Year-to-Date |          |          |          |             |                 |
|-----------------|---------------|----------|----------|----------|-------------|----------------|-----------------------|----------|----------|----------|-------------|-----------------|
|                 | Occ           | % Ch Occ | ADR      | % Ch ADR | % Ch RevPAR | % Ch Room Sold | Occ                   | % Ch Occ | ADR      | % Ch ADR | % Ch RevPAR | % Ch Rooms Sold |
| Downtown Austin | 49.7%         | -2.2     | \$126.61 | 1.8      | -0.5        | 1.9            | 71.3%                 | -1.0     | \$147.29 | 5.8      | 4.7         | 0.2             |
| City of Austin  | 47.3%         | -7.3     | \$96.07  | 2.6      | -4.9        | -3.1           | 67.2%                 | -3.1     | \$110.07 | 5.8      | 2.5         | -1.2            |
| <b>Markets</b>  |               |          |          |          |             |                |                       |          |          |          |             |                 |
| Dallas          | 43.9%         | -5.4     | \$85.14  | -1.6     | -6.9        | -2.9           | 58.9%                 | -1.9     | \$93.87  | 2.2      | 0.3         | 0.5             |
| Houston         | 57.3%         | 8.5      | \$94.03  | 6.8      | 15.9        | 11.8           | 67.4%                 | 2.6      | \$100.17 | 9.4      | 12.2        | 5.5             |
| San Antonio     | 47.6%         | -14.0    | \$98.04  | 1.6      | -12.7       | -6.8           | 64.6%                 | -2.2     | \$106.17 | 4.6      | 2.2         | 3.9             |
| Nashville       | 48.0%         | -9.6     | \$91.59  | -1.3     | -10.8       | -6.1           | 60.8%                 | -7.5     | \$95.53  | 5.0      | -2.9        | -5.0            |
| Phoenix         | 43.9%         | -16.4    | \$102.95 | -5.5     | -21.0       | -11.0          | 59.4%                 | -11.2    | \$124.80 | 3.3      | -8.3        | -7.3            |

**December Occupancy**



**Year to Date Occupancy**





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### Aviation Passengers

|                    | December 2008 | December 2007 | % Ch | 2008 YTD  | 2007 YTD  | YTD % Ch |
|--------------------|---------------|---------------|------|-----------|-----------|----------|
| Total Passengers   | 713,358       | 720,490       | -1%  | 9,039,075 | 8,885,391 | 2%       |
| Total Enplanements | 368,476       | 375,622       | -2%  | 4,619,630 | 4,552,481 | 1%       |

Source: Austin-Bergstrom International Airport

### Visitor Inquiries

|                        | January 2009 | January 2008 | % Ch | 2009 YTD     | 2008 YTD     | YTD % Ch |
|------------------------|--------------|--------------|------|--------------|--------------|----------|
| Visitor Guide Requests | 11,122       | 8,074        | 38%  | 28,692       | 23,290       | 23%      |
| Downtown Visitors      | 7,303        | 6,059        | 21%  | 42,233       | 37,443       | 13%      |
| Phone Calls            | 1,039        | 1,239        | -16% | 4,746        | 5,529        | -14%     |
| Retail Revenue-Gross   | \$32,788.00  | \$21,997.55  | 49%  | \$207,468.00 | \$198,789.47 | 4%       |

### Website Traffic

|                            | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|----------------------------|--------------|--------------|------|----------|----------|----------|
| Unique Web Visits          | 79,645       | 82,709       | -4%  | 248,203  | 265,389  | -6%      |
| Avg. Time Spent on Website | 4.18         | 4.24         | -1%  | 4.06     | 4.11     | -1%      |
| Hotel Reservations Booked  | 8            | 26           | -69% | 33       | 135      | -76%     |

### Group Leisure Travel

|                     | January 2009 | January 2008 | % Ch  | 2009 YTD | 2008 YTD | YTD % Ch |
|---------------------|--------------|--------------|-------|----------|----------|----------|
| Number of Leads*    | 34           | 6            | 467%  | 130      | 23       | 465%     |
| Inquiries Fulfilled | 32           | 45           | -29%  | 107      | 84       | 27%      |
| Tours Booked        | 12           | 10           | -36%  | 26       | 11       | 8%       |
| Room Night Total    | 12,481       | 263          | 4646% | 14,497   | 401      | 3515%    |

\* Change in numbers being reported is due to the fact that we are now following IACVB guidelines matrix for reporting.

\*\* Change in figures for 2007 Number of Leads and Inquiries fulfilled due to recalculation on reporting.

### A Meetings—CVB Booked

|                     | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|---------------------|--------------|--------------|------|----------|----------|----------|
| Number of Meetings* | 3            | 11           | -73% | 21       | 30       | -30%     |
| Room Nights         | 29,510       | 18,263       | 62%  | 90,873   | 78,865   | 15%      |
| Attendance          | 14,450       | 33,340       | -57% | 76,750   | 89,090   | -14%     |

\*Includes Additional Rooms for Previously Booked "A" Definites

### ALL CVB Definite Room Night Bookings

|                             | January 2009 | January 2008 | % Ch |
|-----------------------------|--------------|--------------|------|
| Number of Definite Bookings | 26           | 36           | -28% |
| Total Room Night Production | 36,521       | 29,502       | 24%  |
| Total Attendance            | 21,930       | 39,750       | -45% |

  
**Austin**  
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**A Meetings Lead Production**

|                             | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|-----------------------------|--------------|--------------|------|----------|----------|----------|
| Number of Leads             | 30           | 25           | 20%  | 76       | 82       | -7%      |
| Total Room Night Production | 108,106      | 64,795       | 67%  | 320,827  | 303,958  | 6%       |

**ALL Meetings Lead Production**

|                             | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|-----------------------------|--------------|--------------|------|----------|----------|----------|
| Number of Leads             | 103          | 140          | -26% | 370      | 490      | -24%     |
| Total Room Night Production | 143,334      | 139,111      | 3%   | 481,929  | 553,212  | -13%     |

**Tradeshows & Events**

| Event Name                   | Location         | Department Attending |
|------------------------------|------------------|----------------------|
| PCMA Annual and Client Event | New Orleans, LA  | Sales                |
| ACOM                         | New Orleans, LA  | Services             |
| Southwest Showcase           | Austin, TX       | Sales, Services      |
| RCMA                         | Grand Rapids, MI | Sales                |
| SC08/09 Transition Meeting   | Sedona, AZ       | Services             |
|                              |                  |                      |

**Site Visits**

| Group Name                                                                | Total Room Nights |
|---------------------------------------------------------------------------|-------------------|
| <b>Convention Sales</b>                                                   |                   |
| Texas Library Association                                                 | 7,500             |
| Association for Manufacturing Excellence                                  | 4,120             |
| Blackboard, Inc.                                                          | 3,000             |
| National Home Furnishings Association                                     | 1,350             |
| Church Benefits Association                                               | 555               |
| <b>Convention Services</b>                                                |                   |
| Consortium for School Networking - Planning Meeting                       | 1,521             |
| Association of Texas Professional Educators -                             | 1,260             |
| Woodmen of the World Life Insurance - Planning Meeting                    | 1,460             |
| National Association of Quick Printers - Planning Meeting                 | 335               |
| International Spa Association - Planning Meeting                          | 4,686             |
| American Academy of Physical Medicine & Rehabilitation - Planning Meeting | 4,515             |



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**Convention Center and/or Citywide Event Bookings\***

| Group                                     | Mtg Start Date | Mtg End Date | Estimated Attendance | Est. Room Nights |
|-------------------------------------------|----------------|--------------|----------------------|------------------|
| Museum Store Association                  | 4/16/2010      | 4/20/2010    | 1,450                | 2,110            |
| Texas Department of State Health Services | 11/18/2011     | 11/23/2011   | 3,000                | 4,700            |
| Benevolent and Protective Order of Elks   | 7/1/2012       | 7/5/2012     | 10,000               | 22,700           |
|                                           |                |              |                      |                  |
|                                           |                |              |                      |                  |

\*NEW Definite Bookings only; does not include Additional Rooms for Previously Booked Definites

**Citywide Report-Convention Center Business**

| Year | Definite Attendance | Definite Room Nights | # of Definite Groups | Tentative Attendance | Tentative Room Nights | # of Tentative Groups |
|------|---------------------|----------------------|----------------------|----------------------|-----------------------|-----------------------|
| 2013 | 23,450              | 43,875               | 7                    | 71,300               | 94,091                | 18                    |
| 2012 | 64,900              | 92,446               | 14                   | 89,450               | 98,303                | 26                    |
| 2011 | 61,200              | 80,055               | 16                   | 36,050               | 49,486                | 15                    |
| 2010 | 80,600              | 112,221              | 27                   | 48,100               | 89,722                | 25                    |
| 2009 | 154,191             | 157,876              | 53                   | 11,450               | 25,075                | 12                    |
| 2008 | 232,330             | 164,684              | 62                   |                      |                       |                       |
| 2007 | 185,325             | 144,570              | 56                   |                      |                       |                       |
| 2006 | 225,090             | 161,776              | 61                   |                      |                       |                       |
| 2005 | 183,140             | 149,253              | 56                   |                      |                       |                       |
| 2004 | 241,750             | 190,220              | 51                   |                      |                       |                       |

**Convention Services**

|                                                                    | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|--------------------------------------------------------------------|--------------|--------------|------|----------|----------|----------|
| Meetings Serviced<br>bureau booked = 127<br>non bureau booked = 20 | 147          | 44           | 234% | 384      | 237      | 62%      |
| Reservations Assigned                                              | 3,457        | 1,122        | 208% | 12,321   | 8,746    | 41%      |
| Registration Hours                                                 | 268.75       | 72.00        | 273% | 1,309    | 1,040    | 26%      |
| Music Event Bookings                                               | 15           | 18           | -17% | 60       | 63       | -5%      |

  
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**Film Production**

|                                 | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|---------------------------------|--------------|--------------|------|----------|----------|----------|
| Production/ Referral Inquiries* | 290          | 776          | -63% | 983      | 2,547    | -61%     |
| Production Packages Fulfilled   | 5            | 7            | -29% | 15       | 25       | -40%     |
| Production Starts               | 2            | 1            | 100% | 3        | 9        | -67%     |
| Production Days                 | 27           | 40           | -33% | 146      | 137      | 7%       |

**Film, TV, Commercial, Print and Miscellaneous Production**

*Friday Night Lights* -- NBC/Universal series -- hiatus

*Code Enforcer* -- Independent Feature -- preproduction

*Pink* -- Victoria's Secret Catalog Shoot -- Development

**Heritage Marketing**

|                           | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD | YTD % Ch |
|---------------------------|--------------|--------------|------|----------|----------|----------|
| Walking Tour Participants | 35           | 0            | 35%  | 251      | 226      | 10%      |
| Brochure Distribution     | 315          | 0            | 315% | 150      | 6,400    | -98%     |
| Speakers Bureau           | 0            | 0            | 0%   | 0        | 0        | 0%       |

  
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**Public Relations/Advertising Production**

|                                       | January 2009 | January 2008 | % Ch | 2009 YTD | 2008 YTD    | YTD % Ch |
|---------------------------------------|--------------|--------------|------|----------|-------------|----------|
| Media Outreach (Releases and Pitches) | 10           | 8            | 25%  | 52       | 30          | 73%      |
| # of Contacts Reached                 | 226          | 1,177        | -81% | 1,845    | 3,526       | -48%     |
| Media/Site Visits                     | 12           | 6            | 100% | 34       | 36          | -6%      |
| Dollar impact of media*               | *            | \$512,286    |      | *        | \$1,883,298 |          |
| Advertising Responses                 | 590          | 1,735        | -66% | 6,286    | 6,645       | -5%      |

\*New PR tracking company, Vocus, will provide ad value equivalency ASAP.

**Media Placements**

**Major Newspapers:**

*Austin American-Statesman*  
*Austin Business Journal*  
*El Paso Times*

**Print Magazines:**

*Frommer's Budget Travel*  
*MovieMaker*  
*Texas Journey*

**Online/Internet Outlets:**

*MSN.com*  
*SoulCiti.com*  
*Austin360.com*  
*elpasotimes.com*  
*BudgetTravel.com*  
*Agenda Magazine*

Source: Cision Media Impact Report