California Travel Research Bulletin

July 2008

NEW CTTC RESEARCH DIRECTOR DAN MISHELL – It gives me great pleasure to announce that on August 1, I will be passing the CTTC research baton to the capable hands of Daniel Mishell. Dan brings a wealth of tourism and research experience from his eight years at LA INC., plus biostatistics work at USC. I will provide support for Dan's transition through much of August, and may be available as an occasional resource--until my own post-retirement activities, travels and ag tourism ventures finally win out. It has been a joy and a privilege working with you all and serving the California travel and tourism industry.

--Tiffany Urness

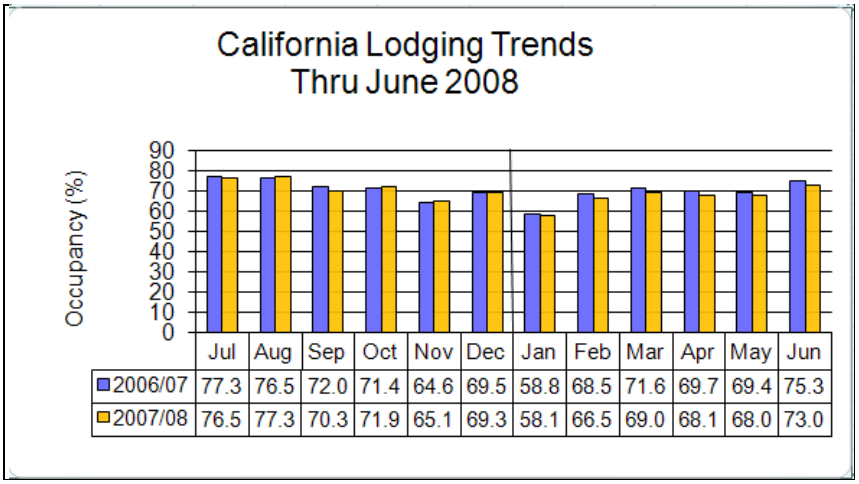
Overseas and Mexican Travel to California, 2007 – The annual report on international travel to California for 2007 is now available. It contains 103 pages of analysis and charts based on the Office of Travel & Tourism Industries (ITA-OTTI) "Survey of International Air Travelers." **Link to report at Visitcalifornia.com.**

Highlights:

- An estimated 5.2 million overseas visitors, or 21.7% of the U.S. total, indicated California was a destination on their trip, up 12.4 percent from 4.6 million in 2006.
- The U.K. and Japan combined generated slightly more than one-quarter of the overseas visitors to California. The number of U.K. visitors to California in 2007 increased by 2% from 752,000 in 2006, to 765,000 in 2007. Japanese visitor volume to California increased by 5% from 646,000 in 2006, to 675,000 in 2007.
- There was an increase in the volume of overseas visitors to California for each of the top ten overseas visitor market countries.
- The volume of visitors from India, followed by those from Germany and France recorded the largest percentage increases for 2007, increasing by 41% (India), 34% (Germany), and 27% (France).

Source: OTTI; CIC Research; July 2008

California Hotel Occupancy and Room Rates (June 2008) – California statewide hotel occupancy in June was down 3 percent from last year, while rates were up 5.7 percent, and room revenues were up 4.6 percent statewide. Just about every California metro area saw occupancy declines in June except for San Francisco. Sacramento, Central Valley areas and California rural north have had especially steep occupancy and Rev PAR declines, likely reflecting the impact of the economic slowdown and highway travel cutbacks, then made worse by June wildfires. **Link to report at visitcalifornia.com.**



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2006/07	77.3	76.5	72.0	71.4	64.6	69.5	58.8	68.5	71.6	69.7	69.4	75.3
2007/08	76.5	77.3	70.3	71.9	65.1	69.3	58.1	66.5	69.0	68.1	68.0	73.0

Source: Smith Travel Research, CA Lodging Industry Performance, July 2008; California Travel Research.

New Interactive Website Features for Analyzing California Air Arrivals – Two new interactive features have been developed for the CTTC by Dean Runyan Associates to track and analyze air passenger travel to California from any U.S.metropolitan market. The data comes from the U.S. Department of Transportation Origin & Destination quarterly reports, the most authoritative and comprehensive publicly available source of domestic air passenger travel data. Both features allow the user to select the time period and the market(s). The first is for looking at single markets, and the second is for comparing multiple markets. Try this DEMO.

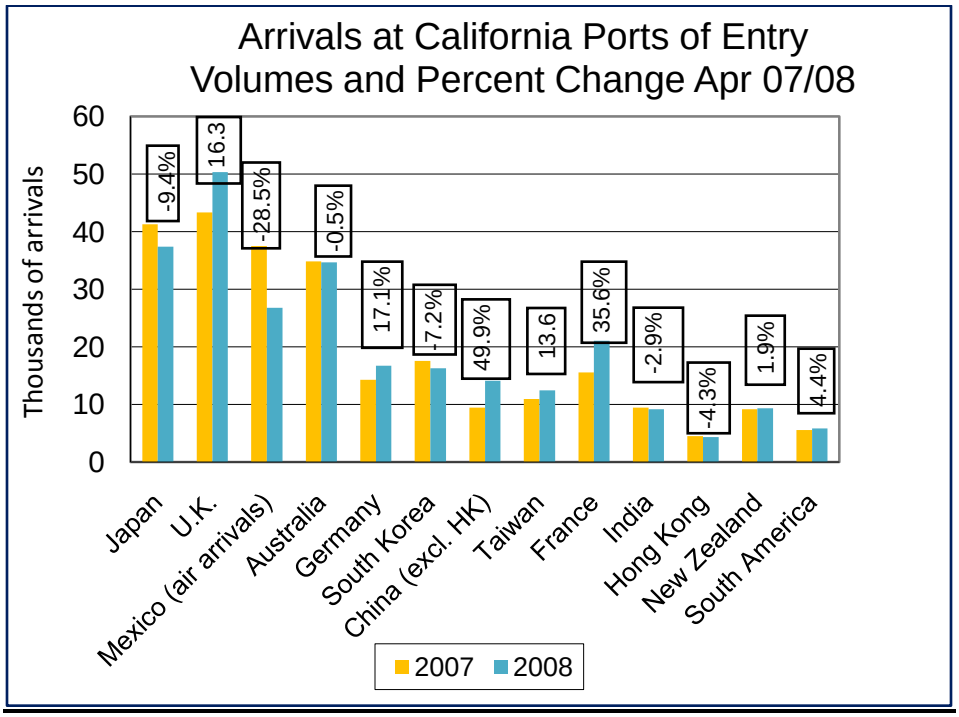
Links to the two new Air Travel Analyzers are located on both the Visitcalifornia.com and Dean Runyan websites:

Air Travel Analyzer, Single Origins

Air Travel Analyzer, Multiple Origins

Source: Dean Runyan Associates, Inc., July 2008.

International Arrivals at California and US Ports of Entry (April 2008) – April 2008 arrivals at California ports of entry from all overseas markets were up 8.8 percent from April 2007. After a brief gain in February, Japan slid back down below 2007 levels in March and April. China double-digit increases have become the norm, but April was especially remarkable, up 49.9 percent. Taiwan bounced back from two weak months. Europe posted overall gains averaging 20.6 percent. Arrivals do not necessarily reflect actual visitation. **Link to report at visitcalifornia.com**.



Source: OTTI, CIC Research Inc., CTTC Research, July 2008

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