

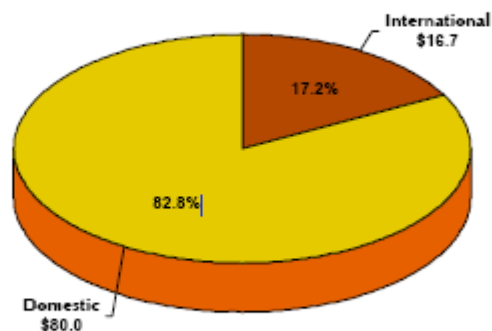
California Travel Research Bulletin

May 2008

State Travel and Tourism Impact Reaches \$96.7 Billion in 2007 – According to the 2008 edition of California Travel Impacts by County :

- Statewide travel spending increased by 3.6 percent over the preceding year.
- During 2007, travel spending in California directly supported 924,100 jobs with earnings of \$30.0 billion. Travel spending generated the greatest number of jobs in accommodation and food services (534,000), and arts, entertainment and recreation (226,500 jobs).
- Over 17 percent of all travel spending in the state in 2007 was attributable to international travel.

Domestic and International Travel Spending
in California, 2007p



Sources: Dean Runyan Associates, Inc., International Trade Administration and Bureau of Economic Analysis.

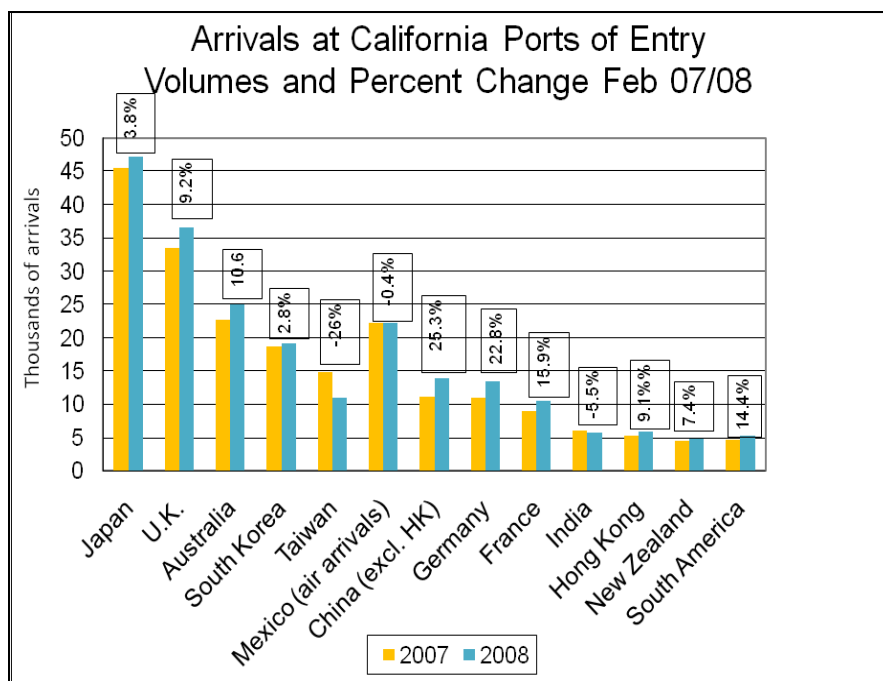
- Travel spending in 2007 generated \$2.2 billion in local taxes and \$3.6 billion in state taxes.
- On average, every \$104,600 in visitor spending supported one travel-related job.

[Link to report at Visitcalifornia.com](http://www.visitcalifornia.com) for full report, with details of county level spending, employment and tax impacts of visitor spending in California from 1992 through 2006, and provides 2007 preliminary state estimates

Also, an excellent resource for tracking California travel impacts is the interactive website designed by Dean Runyan Associates for the CTTC at <http://www.deanrunyan.com/maps/statesdb/CA.html>. Users can create custom charts and graphs **for any California county**, and display transient occupancy tax receipts by jurisdiction.

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

International Arrivals at California and US Ports of Entry (February 2008) – February 2008 arrivals at California ports of entry from all overseas markets were up 7.9 percent from February 2007. Top ranking Japan, which showed declining arrivals throughout most of 2007, improved by 3.8 percent over last year. China once again outperformed all other major markets, up 25.3 percent, with Germany close behind at 22.8 percent. Taiwan plummeted 26 percent. Arrivals do not necessarily reflect actual visitation. [Link to report at visitcalifornia.com](http://visitcalifornia.com).



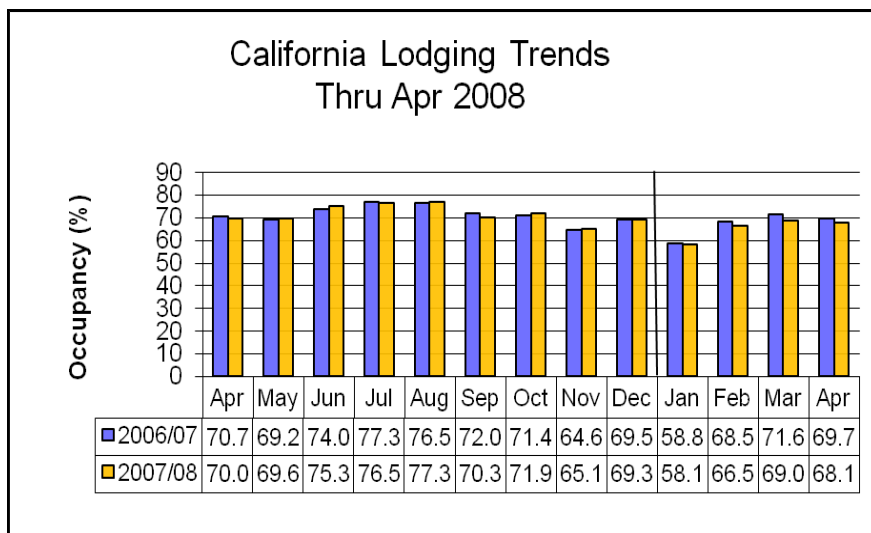
Source: OTTI, CIC Research Inc., CTTC Research, May 2008

Dr. Suzanne Cook Presents 2008 Outlook, Recent TIA Research - TIA Senior Vice President of Research Dr. Suzanne Cook was the featured breakfast speaker at the May meeting of the California Travel and Tourism Commission. Those not fortunate to be in attendance can access much of the material Dr. Cook wove into her presentation in the 324 page report, Outlook for Travel & Tourism, available to non TIA-research subscribers for \$275. Among the findings and insights shared:

- Economists are expressing a bit more optimism that the U.S. will avoid recession.
- Consumers are pessimistic in their travel attitudes, especially about the money they have for travel and its affordability. But has stabilized and even improved in January.
- Optimism directly related to income and age – higher income and younger Americans most optimistic.
- U.S. domestic enplanements were down -0.9 percent, Jan-Mar 2008; international up 6.9 percent.
- Downturn Hitting lodging sector from the bottom up - lower tiers more than upscale and luxury tiers
- Forecast for summer domestic leisure travel, down 1.3 percent; air travel, down 1.4 percent, hotel room-nights, flat.
- Percent of travelers using laptop or handheld during their vacation:
 - 65%, to keep in touch w/friends/family
 - 46%, to research options while on trip
 - 41%, to upload photos, etc. to Internet
 - 26%, to keep in touch with office

[Link to TIA](#)

California Hotel Occupancy and Room Rates (April 2008) – California hotel occupancy has been consistently lagging below 2007 levels and April was no exception, down 2.3 percent from last year, with a statewide average of 68.1 percent versus 69.7 in April 07. Year-to-date, Anaheim and LA are down 3.4 percent and 2.8 percent respectively, while San Diego is down 1.8 percent. San Francisco is one of the few markets where occupancy rates are still advancing, up 1.5 percent for April, and 3.1 percent for the first four months. [Link to report at visitcalifornia.com](http://www.visitcalifornia.com).



Source: Smith Travel Research, CA Lodging Industry Performance, May 2008.

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