# *Smith Travel Research*

## California Tourism

## July 2007 Compared with July 2006

e.outlook

21-Aug-07

| | Operating Performance - July | | | | | | | | | | | | Operating Performance - July - Year to Date | | | | | | | | | | | | Participation | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Occupancy Percent | | | Average Room Rate | | | RevPAR | | | Revenue | Supply | Demand | Occupancy Percent | | | Average Room Rate | | | RevPAR | | | Revenue | Supply | Demand | Properties | | Rooms | |
| Segment | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | % Chg | % Chg | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | % Chg | % Chg | % Chg | Census | Sample | Census | Sample |
| United States | 70.9 | 71.3 | -0.6 | 103.42 | 98.34 | 5.2 | 73.35 | 70.11 | 4.6 | 6.2 | 1.5 | 0.9 | 64.4 | 64.5 | -0.2 | 103.04 | 97.52 | 5.7 | 66.32 | 62.94 | 5.4 | 6.6 | 1.2 | 0.9 | 48862 | 24876 | 4496439 | 3015240 |
| Pacific | 77.7 | 78.3 | -0.8 | 128.46 | 121.18 | 6.0 | 99.86 | 94.94 | 5.2 | 6.1 | 0.9 | 0.1 | 69.4 | 69.7 | -0.4 | 121.18 | 114.21 | 6.1 | 84.16 | 79.57 | 5.8 | 6.4 | 0.6 | 0.3 | 7642 | 3400 | 689270 | 476706 |
| California | 76.5 | 77.3 | -1.0 | 124.45 | 116.39 | 6.9 | 95.23 | 89.95 | 5.9 | 6.8 | 0.9 | -0.1 | 70.3 | 70.5 | -0.3 | 118.33 | 111.03 | 6.6 | 83.20 | 78.29 | 6.3 | 7.0 | 0.7 | 0.4 | 5300 | 2397 | 474630 | 331915 |
| Anaheim-Santa Ana, CA | 83.0 | 83.5 | -0.6 | 130.64 | 121.16 | 7.8 | 108.42 | 101.23 | 7.1 | 6.9 | -0.2 | -0.9 | 75.2 | 74.9 | 0.4 | 121.83 | 112.22 | 8.6 | 91.61 | 84.09 | 8.9 | 10.1 | 1.0 | 1.4 | 422 | 221 | 52492 | 40683 |
| Los Angeles-Long Beach, CA | 80.3 | 80.6 | -0.4 | 123.55 | 114.53 | 7.9 | 99.16 | 92.33 | 7.4 | 6.8 | -0.5 | -1.0 | 76.3 | 76.7 | -0.5 | 122.37 | 114.39 | 7.0 | 93.33 | 87.76 | 6.3 | 5.8 | -0.5 | -1.1 | 950 | 392 | 92202 | 64143 |
| Oakland, CA | 75.4 | 71.1 | 6.0 | 96.40 | 89.22 | 8.0 | 72.66 | 63.41 | 14.6 | 15.1 | 0.4 | 6.5 | 67.5 | 64.2 | 5.1 | 95.65 | 90.42 | 5.8 | 64.57 | 58.06 | 11.2 | 11.6 | 0.4 | 5.5 | 240 | 139 | 24045 | 19099 |
| Riverside-San Bernardino, CA | 60.1 | 63.7 | -5.7 | 82.05 | 79.80 | 2.8 | 49.30 | 50.81 | -3.0 | -1.4 | 1.6 | -4.2 | 65.8 | 68.6 | -4.1 | 100.40 | 97.17 | 3.3 | 66.08 | 66.70 | -0.9 | -0.7 | 0.2 | -3.9 | 473 | 199 | 38039 | 24335 |
| Sacramento, CA | 65.2 | 66.9 | -2.5 | 103.28 | 103.16 | 0.1 | 67.31 | 69.06 | -2.5 | -0.4 | 2.1 | -0.6 | 63.1 | 64.7 | -2.5 | 100.39 | 97.81 | 2.6 | 63.38 | 63.31 | 0.1 | 1.1 | 0.9 | -1.5 | 275 | 122 | 23204 | 15876 |
| San Diego, CA | 84.8 | 88.3 | -4.0 | 157.25 | 148.11 | 6.2 | 133.39 | 130.72 | 2.0 | 3.6 | 1.5 | -2.4 | 74.4 | 75.6 | -1.6 | 140.54 | 131.80 | 6.6 | 104.56 | 99.58 | 5.0 | 6.1 | 1.1 | -0.5 | 449 | 248 | 53824 | 41909 |
| San Francisco/San Mateo, CA | 83.3 | 80.8 | 3.1 | 148.20 | 136.99 | 8.2 | 123.52 | 110.63 | 11.7 | 12.0 | 0.3 | 3.6 | 73.4 | 71.5 | 2.7 | 143.69 | 135.55 | 6.0 | 105.41 | 96.95 | 8.7 | 8.7 | -0.1 | 2.5 | 383 | 218 | 50359 | 41766 |
| San Jose-Santa Cruz, CA | 75.5 | 72.0 | 4.9 | 120.41 | 110.28 | 9.2 | 90.90 | 79.35 | 14.6 | 14.1 | -0.4 | 4.5 | 70.7 | 68.1 | 3.8 | 118.52 | 108.60 | 9.1 | 83.80 | 74.01 | 13.2 | 12.8 | -0.4 | 3.3 | 306 | 182 | 29072 | 23014 |
| California South/Central | 64.3 | 68.9 | -6.7 | 73.53 | 69.45 | 5.9 | 47.27 | 47.85 | -1.2 | 2.1 | 3.4 | -3.6 | 63.0 | 65.5 | -3.8 | 72.32 | 67.73 | 6.8 | 45.59 | 44.36 | 2.8 | 6.5 | 3.6 | -0.3 | 318 | 142 | 22838 | 13665 |
| California North | 71.4 | 73.9 | -3.4 | 101.64 | 96.30 | 5.5 | 72.53 | 71.19 | 1.9 | 3.9 | 2.0 | -1.6 | 60.1 | 61.2 | -1.8 | 92.37 | 87.99 | 5.0 | 55.48 | 53.81 | 3.1 | 4.9 | 1.7 | -0.1 | 630 | 214 | 33788 | 17229 |
| California North Central | 69.0 | 72.1 | -4.3 | 95.37 | 90.03 | 5.9 | 65.79 | 64.89 | 1.4 | 2.9 | 1.5 | -2.9 | 62.4 | 64.5 | -3.3 | 91.82 | 88.73 | 3.5 | 57.28 | 57.23 | 0.1 | 1.0 | 1.0 | -2.4 | 264 | 91 | 16306 | 7734 |
| Central California Coast | 79.4 | 79.5 | -0.1 | 154.93 | 146.88 | 5.5 | 122.96 | 116.74 | 5.3 | 8.2 | 2.7 | 2.5 | 66.3 | 65.5 | 1.2 | 133.22 | 124.52 | 7.0 | 88.28 | 81.53 | 8.3 | 10.8 | 2.4 | 3.6 | 552 | 218 | 36261 | 21510 |
| Bakersfield, CA | 61.5 | 68.2 | -9.8 | 64.45 | 62.98 | 2.3 | 39.66 | 42.94 | -7.6 | -4.8 | 3.1 | -7.0 | 63.1 | 66.0 | -4.4 | 65.45 | 62.54 | 4.7 | 41.30 | 41.24 | 0.1 | 3.7 | 3.6 | -0.9 | 117 | 53 | 9063 | 5410 |
| Fresno, CA | 64.1 | 67.6 | -5.2 | 79.06 | 73.24 | 7.9 | 50.69 | 49.53 | 2.3 | 3.3 | 1.0 | -4.3 | 62.2 | 64.1 | -3.0 | 77.42 | 71.69 | 8.0 | 48.15 | 45.96 | 4.8 | 5.9 | 1.1 | -1.9 | 113 | 55 | 8832 | 5594 |
| Tulare/Visalia | 69.7 | 72.7 | -4.1 | 79.14 | 74.39 | 6.4 | 55.13 | 54.09 | 1.9 | 10.5 | 8.4 | 3.9 | 64.4 | 67.2 | -4.2 | 75.75 | 70.18 | 7.9 | 48.81 | 47.18 | 3.5 | 12.1 | 8.3 | 3.8 | 88 | 34 | 4943 | 2661 |
| Santa Rosa | 77.9 | 77.7 | 0.3 | 129.87 | 124.77 | 4.1 | 101.11 | 96.92 | 4.3 | 4.8 | 0.4 | 0.7 | 63.4 | 63.0 | 0.6 | 117.47 | 112.93 | 4.0 | 74.54 | 71.14 | 4.8 | 5.3 | 0.5 | 1.2 | 81 | 35 | 5607 | 3699 |
| Redding/Chico | 71.8 | 71.9 | -0.1 | 72.91 | 69.20 | 5.4 | 52.31 | 49.77 | 5.1 | 5.1 | 0.0 | -0.2 | 60.9 | 61.5 | -1.0 | 69.29 | 66.23 | 4.6 | 42.17 | 40.73 | 3.5 | 3.8 | 0.3 | -0.8 | 68 | 32 | 4423 | 2647 |
| Vallejo/Napa Valley | 68.1 | 71.6 | -4.9 | 125.60 | 117.49 | 6.9 | 85.57 | 84.18 | 1.7 | 4.7 | 3.0 | -2.0 | 61.7 | 62.9 | -1.9 | 111.64 | 105.19 | 6.1 | 68.90 | 66.11 | 4.2 | 7.7 | 3.4 | 1.5 | 144 | 53 | 9158 | 5103 |
| California North Area | 67.6 | 72.6 | -6.9 | 82.65 | 78.70 | 5.0 | 55.85 | 57.10 | -2.2 | 0.9 | 3.2 | -3.9 | 56.3 | 59.2 | -4.9 | 76.66 | 73.97 | 3.6 | 43.14 | 43.78 | -1.5 | 0.6 | 2.1 | -3.0 | 268 | 67 | 11573 | 4088 |
| Eureka/Crescent City | 83.0 | 81.8 | 1.5 | 88.52 | 84.56 | 4.7 | 73.45 | 69.15 | 6.2 | 6.2 | 0.0 | 1.5 | 61.9 | 59.5 | 4.0 | 74.04 | 70.77 | 4.6 | 45.86 | 42.13 | 8.9 | 8.8 | 0.0 | 4.0 | 69 | 27 | 3027 | 1692 |
| Stockton/Modesto | 63.6 | 67.2 | -5.4 | 74.40 | 69.14 | 7.6 | 47.30 | 46.46 | 1.8 | 5.9 | 4.0 | -1.6 | 62.3 | 63.8 | -2.4 | 71.73 | 68.86 | 4.2 | 44.66 | 43.92 | 1.7 | 5.1 | 3.3 | 0.9 | 104 | 56 | 7096 | 4966 |
| Central CA/Merced | 73.2 | 75.7 | -3.3 | 109.40 | 103.71 | 5.5 | 80.04 | 78.48 | 2.0 | 1.6 | -0.4 | -3.7 | 62.5 | 65.0 | -3.8 | 107.16 | 103.06 | 4.0 | 66.94 | 67.02 | -0.1 | -0.9 | -0.8 | -4.7 | 160 | 35 | 9210 | 2768 |
| Oxnard/Ventura MSA | 74.2 | 79.0 | -6.1 | 113.88 | 107.48 | 6.0 | 84.44 | 84.90 | -0.5 | 6.9 | 7.5 | 0.9 | 67.4 | 69.7 | -3.3 | 107.58 | 98.60 | 9.1 | 72.54 | 68.76 | 5.5 | 11.9 | 6.1 | 2.5 | 83 | 46 | 7873 | 6065 |
| Santa Barbara/Santa Maria MSA | 81.0 | 80.1 | 1.1 | 172.04 | 155.78 | 10.4 | 139.32 | 124.80 | 11.6 | 11.9 | 0.2 | 1.3 | 68.7 | 67.8 | 1.3 | 140.82 | 124.08 | 13.5 | 96.73 | 84.07 | 15.1 | 14.6 | -0.4 | 1.0 | 121 | 47 | 8837 | 4890 |
| San Luis Obispo/Paso Robles | 80.9 | 79.7 | 1.5 | 133.29 | 126.82 | 5.1 | 107.81 | 101.13 | 6.6 | 11.9 | 4.9 | 6.4 | 65.9 | 62.4 | 5.6 | 111.20 | 106.16 | 4.7 | 73.28 | 66.21 | 10.7 | 14.7 | 3.6 | 9.5 | 146 | 47 | 7963 | 3613 |
| Monterey/Salinas MSA | 80.6 | 79.1 | 1.9 | 182.41 | 178.11 | 2.4 | 147.06 | 140.93 | 4.3 | 4.3 | 0.0 | 1.9 | 63.9 | 63.0 | 1.4 | 160.54 | 155.25 | 3.4 | 102.60 | 97.86 | 4.8 | 6.2 | 1.3 | 2.7 | 202 | 78 | 11588 | 6942 |

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