



Smith Travel Research
California Tourism
September 2007 Compared with September 2006

e.outlook

23-Oct-07

| Segment | Operating Performance - September | | | | | | | | | | | Operating Performance - September - Year to Date | | | | | | | | | | | Participation | | | | | |
|-------------------------------|-----------------------------------|------|-------|-------------------|--------|-------|--------|--------|-------|---------|--------|--|-------------------|------|-------|-------------------|--------|-------|--------|--------|-------|---------|---------------|--------|------------|--------|---------|---------|
| | Occupancy Percent | | | Average Room Rate | | | RevPAR | | | Revenue | Supply | Demand | Occupancy Percent | | | Average Room Rate | | | RevPAR | | | Revenue | Supply | Demand | Properties | | Rooms | |
| | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | % Chg | % Chg | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | 2007 | 2006 | % Chg | % Chg | % Chg | % Chg | % Chg | Census | Sample | Census |
| United States | 64.7 | 65.0 | -0.5 | 103.52 | 98.15 | 5.5 | 66.94 | 63.80 | 4.9 | 6.5 | 1.5 | 1.0 | 65.0 | 65.0 | 0.0 | 103.22 | 97.64 | 5.7 | 67.13 | 63.50 | 5.7 | 7.0 | 1.2 | 1.2 | 49024 | 25128 | 4509710 | 3037206 |
| Pacific | 71.1 | 72.6 | -2.1 | 120.69 | 113.87 | 6.0 | 85.87 | 82.62 | 3.9 | 5.1 | 1.1 | -0.9 | 70.6 | 71.0 | -0.6 | 122.17 | 115.06 | 6.2 | 86.31 | 81.64 | 5.7 | 6.4 | 0.7 | 0.2 | 7648 | 3454 | 690173 | 480406 |
| California | 70.3 | 72.0 | -2.4 | 119.84 | 113.21 | 5.9 | 84.25 | 81.53 | 3.3 | 4.5 | 1.1 | -1.3 | 71.1 | 71.3 | -0.3 | 119.28 | 111.95 | 6.5 | 84.78 | 79.88 | 6.1 | 6.9 | 0.7 | 0.3 | 5299 | 2443 | 475399 | 335550 |
| Anaheim-Santa Ana, CA | 64.9 | 68.2 | -4.8 | 118.18 | 114.34 | 3.4 | 76.65 | 77.99 | -1.7 | -1.9 | -0.2 | -5.1 | 74.4 | 74.5 | -0.1 | 122.55 | 113.69 | 7.8 | 91.19 | 84.72 | 7.6 | 8.4 | 0.7 | 0.6 | 422 | 217 | 52500 | 40068 |
| Los Angeles-Long Beach, CA | 75.6 | 75.7 | -0.1 | 119.86 | 111.47 | 7.5 | 90.59 | 84.44 | 7.3 | 7.2 | -0.1 | -0.3 | 76.8 | 77.0 | -0.3 | 122.34 | 114.34 | 7.0 | 93.94 | 88.05 | 6.7 | 6.2 | -0.5 | -0.8 | 950 | 395 | 92250 | 64374 |
| Oakland, CA | 71.3 | 69.8 | 2.1 | 96.92 | 91.46 | 6.0 | 69.06 | 63.83 | 8.2 | 8.5 | 0.3 | 2.4 | 69.0 | 65.6 | 5.2 | 95.95 | 90.76 | 5.7 | 66.16 | 59.57 | 11.1 | 11.5 | 0.4 | 5.4 | 240 | 140 | 24042 | 19083 |
| Riverside-San Bernardino, CA | 60.4 | 62.9 | -4.0 | 90.18 | 88.67 | 1.7 | 54.50 | 55.78 | -2.3 | 0.3 | 2.6 | -1.4 | 64.8 | 67.0 | -3.3 | 97.41 | 94.51 | 3.1 | 63.17 | 63.34 | -0.3 | 0.1 | 0.4 | -2.9 | 473 | 204 | 38092 | 24860 |
| Sacramento, CA | 63.5 | 66.9 | -5.1 | 98.83 | 98.04 | 0.8 | 62.71 | 65.60 | -4.4 | -4.7 | -0.3 | -5.5 | 63.6 | 65.8 | -3.3 | 100.85 | 98.26 | 2.6 | 64.15 | 64.63 | -0.7 | -1.2 | -0.5 | -3.7 | 264 | 122 | 22939 | 15866 |
| San Diego, CA | 70.9 | 73.7 | -3.8 | 136.22 | 129.35 | 5.3 | 96.62 | 95.34 | 1.3 | 3.6 | 2.2 | -1.6 | 75.2 | 76.3 | -1.4 | 141.79 | 133.13 | 6.5 | 106.61 | 101.63 | 4.9 | 6.2 | 1.3 | -0.3 | 451 | 253 | 54076 | 42398 |
| San Francisco/San Mateo, CA | 84.0 | 83.2 | 1.0 | 159.01 | 147.62 | 7.7 | 133.52 | 122.83 | 8.7 | 9.2 | 0.4 | 1.4 | 75.8 | 73.8 | 2.7 | 146.12 | 136.97 | 6.7 | 110.75 | 101.14 | 9.5 | 9.5 | 0.0 | 2.7 | 383 | 217 | 50361 | 41803 |
| San Jose-Santa Cruz, CA | 69.9 | 68.8 | 1.6 | 118.70 | 109.15 | 8.7 | 83.01 | 75.12 | 10.5 | 10.1 | -0.4 | 1.2 | 71.2 | 68.9 | 3.3 | 118.86 | 108.96 | 9.1 | 84.62 | 75.04 | 12.8 | 12.3 | -0.4 | 2.9 | 306 | 182 | 29074 | 22919 |
| California South/Central | 62.9 | 68.5 | -8.2 | 70.90 | 69.09 | 2.6 | 44.63 | 47.30 | -5.6 | -2.7 | 3.2 | -5.2 | 63.5 | 66.4 | -4.4 | 72.30 | 68.16 | 6.1 | 45.93 | 45.27 | 1.5 | 5.1 | 3.5 | -1.0 | 319 | 145 | 22899 | 14016 |
| California North | 67.5 | 71.2 | -5.2 | 103.56 | 99.36 | 4.2 | 69.94 | 70.78 | -1.2 | 1.5 | 2.7 | -2.6 | 62.3 | 63.9 | -2.5 | 95.46 | 90.73 | 5.2 | 59.49 | 58.00 | 2.6 | 4.5 | 1.9 | -0.6 | 634 | 224 | 34018 | 17843 |
| California North Central | 63.4 | 68.3 | -7.2 | 93.84 | 90.58 | 3.6 | 59.53 | 61.86 | -3.8 | -2.3 | 1.6 | -5.7 | 63.2 | 65.9 | -4.1 | 92.12 | 88.89 | 3.6 | 58.25 | 58.54 | -0.5 | 0.5 | 1.0 | -3.0 | 265 | 97 | 16393 | 8369 |
| Central California Coast | 70.6 | 71.5 | -1.3 | 142.45 | 136.36 | 4.5 | 100.64 | 97.53 | 3.2 | 7.0 | 3.7 | 2.4 | 68.3 | 67.8 | 0.7 | 137.88 | 129.59 | 6.4 | 94.15 | 87.82 | 7.2 | 10.0 | 2.6 | 3.4 | 554 | 234 | 36555 | 22891 |
| Bakersfield, CA | 60.1 | 67.1 | -10.4 | 63.13 | 63.21 | -0.1 | 37.91 | 42.44 | -10.7 | -8.0 | 2.9 | -7.9 | 63.1 | 66.3 | -4.8 | 65.12 | 62.73 | 3.8 | 41.08 | 41.59 | -1.2 | 2.1 | 3.4 | -1.6 | 117 | 57 | 9065 | 5752 |
| Fresno, CA | 61.9 | 67.2 | -7.9 | 74.67 | 73.16 | 2.1 | 46.21 | 49.16 | -6.0 | -5.4 | 0.6 | -7.3 | 62.5 | 65.2 | -4.1 | 77.24 | 72.12 | 7.1 | 48.30 | 47.03 | 2.7 | 3.8 | 1.1 | -3.0 | 114 | 56 | 8884 | 5761 |
| Tulare/Visalia | 70.2 | 73.5 | -4.5 | 77.14 | 72.24 | 6.8 | 54.12 | 53.09 | 1.9 | 10.5 | 8.4 | 3.5 | 66.1 | 68.9 | -4.1 | 76.40 | 70.93 | 7.7 | 50.49 | 48.87 | 3.3 | 12.0 | 8.4 | 3.9 | 88 | 32 | 4950 | 2503 |
| Santa Rosa | 75.0 | 74.7 | 0.4 | 139.19 | 134.64 | 3.4 | 104.34 | 100.59 | 3.7 | 4.8 | 1.1 | 1.4 | 66.2 | 65.9 | 0.5 | 123.78 | 117.87 | 5.0 | 81.95 | 77.70 | 5.5 | 6.2 | 0.7 | 1.1 | 83 | 39 | 5672 | 3941 |
| Redding/Chico | 66.5 | 70.4 | -5.5 | 70.22 | 68.12 | 3.1 | 46.70 | 47.94 | -2.6 | -2.6 | 0.0 | -5.5 | 62.9 | 63.9 | -1.6 | 69.94 | 66.83 | 4.7 | 43.97 | 42.72 | 2.9 | 3.1 | 0.2 | -1.4 | 68 | 33 | 4423 | 2704 |
| Vallejo/Napa Valley | 68.5 | 70.4 | -2.7 | 131.77 | 127.23 | 3.6 | 90.30 | 89.56 | 0.8 | 5.9 | 5.1 | 2.3 | 63.7 | 64.9 | -1.8 | 116.22 | 109.94 | 5.7 | 73.99 | 71.32 | 3.7 | 7.5 | 3.6 | 1.7 | 146 | 57 | 9324 | 5353 |
| California North Area | 62.5 | 69.9 | -10.6 | 78.48 | 77.20 | 1.7 | 49.04 | 54.00 | -9.2 | -6.1 | 3.4 | -7.6 | 58.4 | 62.3 | -6.3 | 77.57 | 74.92 | 3.5 | 45.27 | 46.64 | -2.9 | -0.7 | 2.3 | -4.1 | 268 | 68 | 11571 | 4130 |
| Eureka/Crescent City | 71.4 | 73.3 | -2.6 | 79.33 | 76.26 | 4.0 | 56.60 | 55.88 | 1.3 | 1.3 | 0.0 | -2.6 | 65.2 | 63.6 | 2.5 | 77.05 | 73.78 | 4.4 | 50.21 | 46.90 | 7.1 | 7.1 | 0.0 | 2.5 | 69 | 27 | 3028 | 1715 |
| Stockton/Modesto | 61.4 | 64.4 | -4.7 | 73.43 | 69.45 | 5.7 | 45.06 | 44.75 | 0.7 | 3.7 | 3.0 | -1.9 | 62.4 | 64.4 | -3.1 | 72.30 | 69.06 | 4.7 | 45.13 | 44.46 | 1.5 | 4.8 | 3.3 | 0.1 | 104 | 58 | 7099 | 5226 |
| Central CA/Merced | 65.0 | 71.2 | -8.7 | 108.55 | 104.84 | 3.5 | 70.58 | 74.61 | -5.4 | -4.9 | 0.5 | -8.2 | 63.9 | 67.0 | -4.6 | 106.97 | 102.95 | 3.9 | 68.30 | 68.93 | -0.9 | -1.5 | -0.6 | -5.2 | 161 | 39 | 9294 | 3143 |
| Oxnard/Ventura MSA | 66.9 | 70.1 | -4.6 | 109.55 | 100.70 | 8.8 | 73.29 | 70.64 | 3.8 | 14.2 | 10.1 | 5.0 | 68.4 | 71.0 | -3.7 | 108.98 | 100.37 | 8.6 | 74.49 | 71.25 | 4.5 | 11.7 | 6.8 | 2.9 | 84 | 45 | 8031 | 5974 |
| Santa Barbara/Santa Maria MSA | 74.6 | 75.3 | -0.9 | 147.01 | 137.17 | 7.2 | 109.71 | 103.31 | 6.2 | 7.4 | 1.1 | 0.2 | 71.0 | 70.2 | 1.1 | 145.79 | 130.06 | 12.1 | 103.56 | 91.26 | 13.5 | 13.3 | -0.2 | 1.1 | 121 | 53 | 8845 | 5439 |
| San Luis Obispo/Paso Robles | 67.2 | 68.5 | -1.9 | 118.40 | 115.28 | 2.7 | 79.54 | 79.00 | 0.7 | 7.4 | 6.6 | 4.5 | 67.0 | 64.7 | 3.6 | 114.66 | 110.37 | 3.9 | 76.82 | 71.46 | 7.5 | 12.2 | 4.4 | 8.0 | 148 | 54 | 8124 | 4283 |
| Monterey/Salinas MSA | 72.6 | 71.5 | 1.5 | 175.57 | 171.02 | 2.7 | 127.55 | 122.27 | 4.3 | 4.0 | -0.3 | 1.3 | 67.0 | 65.9 | 1.7 | 167.31 | 161.79 | 3.4 | 112.13 | 106.58 | 5.2 | 6.1 | 0.9 | 2.6 | 201 | 82 | 11555 | 7195 |

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