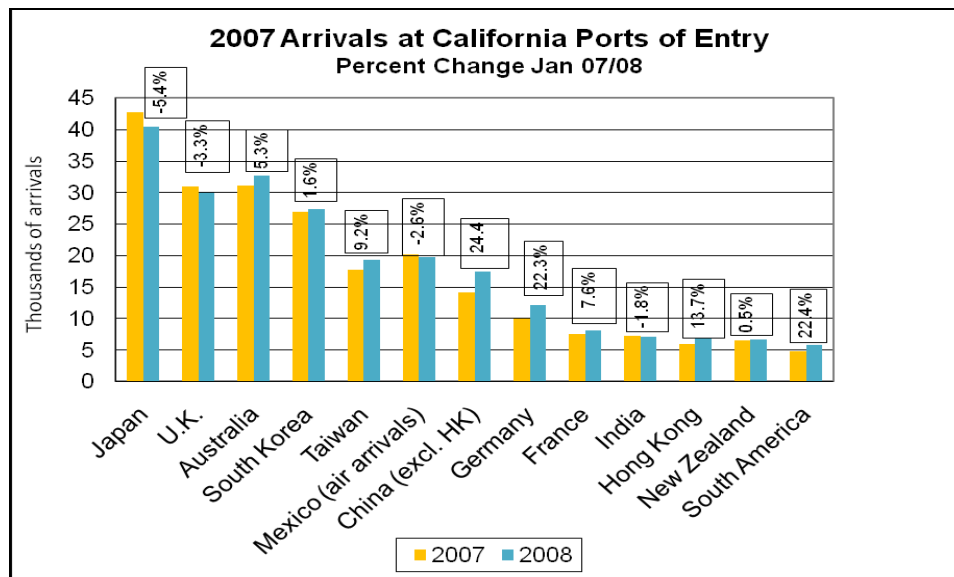


## California Travel Research Bulletin

April 2008

**International Arrivals at California and US Ports of Entry (January 2008)** – January 2008 arrivals at California ports of entry from all overseas markets were up 6.3% over January 2007. California admitted more visitors from Japan than from any other country, but arrival volume was 5.4% smaller than last year. Largest gains came from China, up 24.4 percent, South America, up 22.4 percent, and Germany, up 22.3 percent.

[Link to report at visitcalifornia.com.](http://visitcalifornia.com)



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

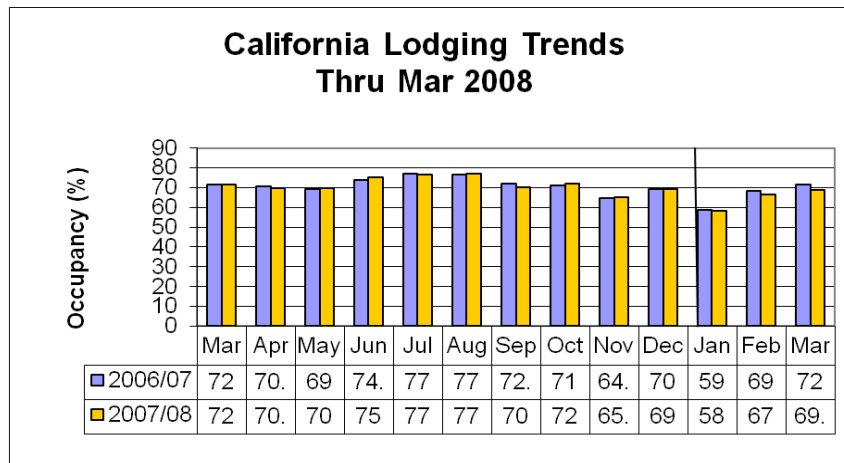
**Domestic Air Travel to California, Year End 2007** – Air travel to California on domestic flights increased by 3.5 percent in 2007, to 31.9 million visitors. Top ten ranking markets by volume and their performance:

1. New York-Newark-Bridgeport, NY-NJ-CT-PA	+2.9%
2. Seattle-Tacoma-Olympia, WA	+2.2%
3. Phoenix-Mesa-Scottsdale, AZ	-1.7%
4. Chicago-Naperville-Michigan City, IL-IN-WI	+5.3%
5. Washington-Baltimore-N.Virginia, DC-MD-VA-WV	+0.2%
6. Denver-Aurora-Boulder, CO	+8.3%
7. Portland-Vancouver-Beaverton, OR-WA	+1.9%
8. Dallas-Fort Worth, TX	+12.6%
9. Boston-Worcester-Manchester, MA-RI-NH	+4.1%
10. Houston-Baytown-Huntsville, TX	+4.3%

Quarterly and annual tables and charts on air travel from more than 30 domestic markets to California statewide, the Bay Area, LA, and San Diego, are included in the 49-page report *U.S. Domestic Air Travel to California Destinations Year End 2007*. [Link to report at visitcalifornia.com](http://visitcalifornia.com)

Source: Dept. of Transportation; Dean Runyan Associates, April 2008.

**California Hotel Occupancy and Room Rates (March 2008)** – California hotel occupancy in March declined for the fourth consecutive month, down 3.6 percent compared to 2007, with a statewide average of 69 percent versus 71.6 in 2007. Average room rates were 5.1 percent above the same time last year, with average RevPAR up 1.3%. [Link to report at visitcalifornia.com](http://www.visitcalifornia.com).



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

**Trends to watch** – According to *Tomorrow's Tourist - Scenarios & Trends (2008)*, by Ian Yeoman:

- Inbound to the USA from Europe / UK will do well in 2008 because of exchange rates
- Employment in Europe is still strong - so Europeans are still travelling
- Business travel follows exports by type of good
- The Aussie economy market will do well because of minerals and mining
- Asia is still robust - no sign of a major economic downturn as yet
- The US domestic luxury and budget brand market will do OK, with the middle market being squeezed
- In 2008, the USA will be the world's number one tourist destination according to expenditures

*Long Term Outlook*

The fiscal and current-account deficit in the United States is driving the currency markets and this is not expected to change before 2012. Increased expenditure on advertising, promoting an iconic national brand and an improved destination website are all expected to help reposition the United States of America in the world tourism market in the next couple of years. Therefore, international receipts are forecasted to grow from US \$81.7 billion in 2005 to US \$223 billion by 2030, an increase of 4% per annum, giving the United States an 11.1% share of world tourism receipts.

Source: Yeoman 2008 – [www.tomorrowstourist.com](http://www.tomorrowstourist.com)

**TIA Power of Travel Interactive** – A bounty of facts and figures at your fingertips, including state-by-state travel impacts, jobs and tax receipts by congressional district, international markets and trends, and fact sheets on current issues and initiatives such as visa waivers. <http://poweroftravel.org/statistics/>

This Bulletin was sent to you at your request. If you no longer wish to subscribe, reply: Cancel or Unsubscribe.

Tiffany Urness  
Acting Director, Research  
California Travel and Tourism Commission  
980 9th Street, Suite 480/Sacramento, CA 95814  
direct: 916 327 3391 fax: 916 322 3402  
research@visitcalifornia.com

April 2008