

CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2008

Germany was California's third largest overseas market with approximately 393,000 visitors to California in 2008. Collectively visitors from Germany spent approximately \$444 million in California.

German visitors to California during 2008 reported spending \$114 per day during a 9.9 night average stay or approximately \$1,129 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

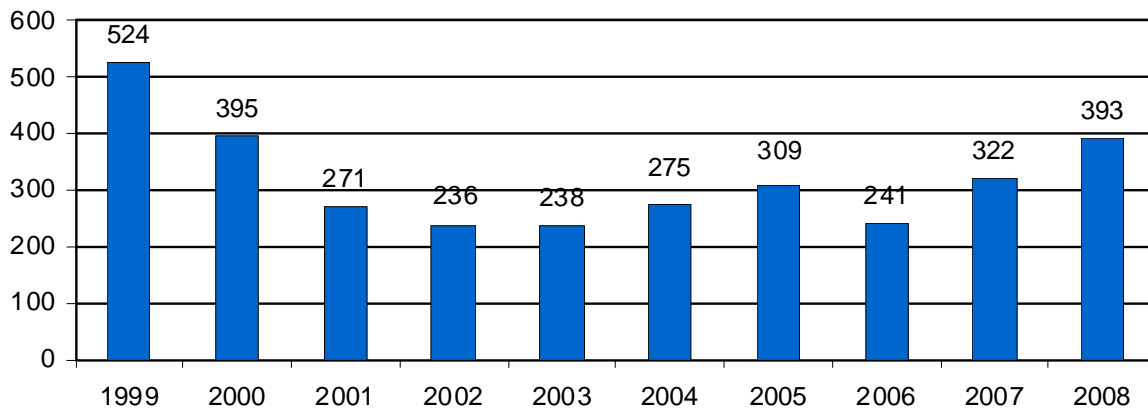
Visitors From Germany

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	1,901,938	26.5%	504,000
1999	1,984,627	26.4%	524,000
2000	1,786,045	22.1%	395,000
2001	1,313,756	20.6%	271,000
2002	1,189,856	19.8%	236,000
2003	1,180,212	20.2%	238,000
2004	1,319,904	20.8%	275,000
2005	1,415,530	21.8%	309,000
2006	1,385,520	17.4%	241,000
2007	1,524,151	21.1%	322,000
2008	1,782,229	22.1%	393,000

1) U.S. Dept of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept of Commerce, Office of Travel & Tourism Industries, "Survey of International Air Travelers."

**Number of Visitors from Germany to CA, 1999-2008
(in 000s)**



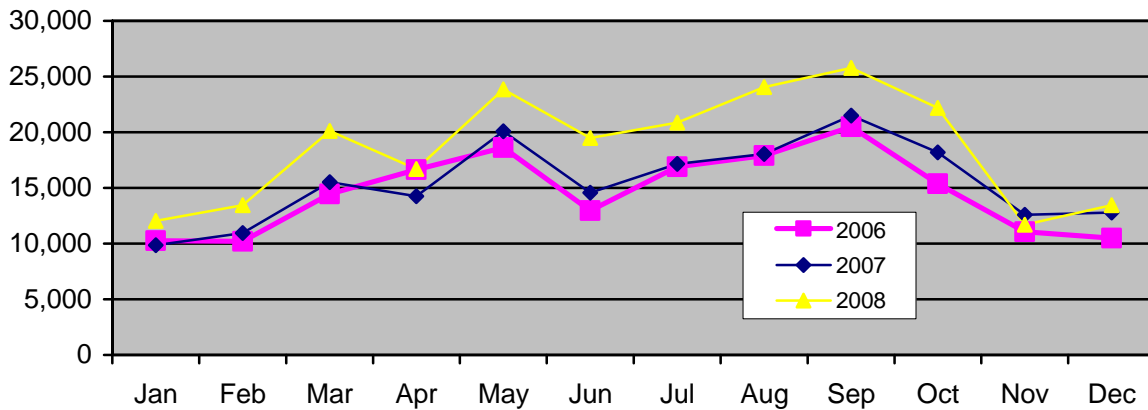
Source: International Trade Administration, Office of Travel and Tourism Industries.

The volume of visitors to California from Germany was consistently near or above 500,000 per year throughout the 1990s. However, the number of German visitors dropped precipitously in 2000 and continued to drop following the 9-11 terrorist attacks to a low of 236,000 visitors in 2002. Growth in German visitors and market share for California increased in 2008, but it is not clear that the California market share will continue to improve.

German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were higher during most of 2008 than in the previous 2 years. The volume of German residents arriving at California ports-of-entry peaked in May and September. The lowest volumes of German arrivals were recorded in January, February, November, and December.

**Residents of Germany
Monthly Port of Entry Arrivals to CA
2006-2008**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Germany are provided in the following table. The table also includes trip and traveler characteristics of all overseas visitors to California for comparative purposes.

Compared to all overseas visitors to California, travelers from Germany are more likely to:

- Travel to California for leisure/recreation/holiday purposes
- Make use of a state/city travel office, travel guides and personal computers when planning their trip
- Have longer trip planning and advance airline booking horizons
- Mention a non-stop flight and safety reputation as main factors in selecting an airline
- Visit national parks, tour the countryside, and visit cultural heritage sites
- Rent an auto for transportation while in the U.S.
- Use credit cards to pay for trip expenses

Conversely, visitors from Germany are less likely to:

- Travel to California for business purposes
- Make use of a travel agent when planning their trip
- Visit Los Angeles as part of their trip
- Use cash to pay for trip expenses

**Characteristics of Travelers from
Germany to California, 2008**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Germany (n = 332)	Leisure Visitors from Germany (n = 219)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	56%	76%
Visit Friends/Relatives	19	18	24
Business/Professional	27	20	-
Convention/Conference	7	3	-
Other Purpose	5	2	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	70%	88%
Visit Friends/Relatives	37	37	41
Business/Professional	31	24	3
Convention/Conference	11	5	-
Sources Used to Plan Trip**			
Airlines Directly	21%	28%	30%
Corporate Travel Department	11	10	3
Personal Computer	42	49	68
Friends/Relatives	16	15	18
Newspapers/Magazines	3	6	9
State/City Travel Office	4	21	26
Tour Company	6	3	3
Travel Agency	43	33	27
Travel Guides	10	19	25
Advance Planning for Trip			
7 days or less	9%	5%	1%
8 - 30 days	30	18	13
31 - 60 days	19	17	14
61 - 90 days	13	11	12
More than 3 Months	30	50	60
Total	100%	100%	100%
Average Planning Time in Days	92	131	154
Advance Airline Reservations			
7 days or less	16%	8%	5%
8 - 30 days	38	27	21
31 - 60 days	17	18	18
61 - 90 days	10	14	16
91 - 120 days	5	12	15
121 - 180 days	8	12	14
6 Months or More	6	9	12
Total	100%	100%	100%
Average Booking in Days	60	82	97

**Characteristics of Travelers from Germany to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Germany (n = 332)	Leisure Visitors from Germany (n = 219)
Means of Booking Air Trip			
Airlines Directly	12%	14%	17%
Corporate Travel Department	11	10	3
Personal Computer	22	23	28
Travel Agent	48	47	46
Travel Club	1	-	-
Tour Operator	4	3	4
Other/Don't Know	3	4	3
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	24%	24%
Schedule	15	10	8
Non-Stop Flight	13	20	19
Mileage Bonus/Frequent Flyer Program	12	7	7
Previous Good Experience	10	11	12
Safety Reputation	7	16	18
Airline Loyalty	4	2	1
In-flight Service	5	3	3
Employer policy	4	1	-
Other	6	7	8
Airline Seating Area			
Economy/Tourist/Coach	77%	78%	82%
Executive/Business	20	19	16
First Class	3	3	2
Total	100%	100%	100%
Use of Package			
Yes	11%	6%	8%
No	89	94	92
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	26	2%	3%
31 - 60 days	23	14	15
61 - 90 days	12	23	19
91 - 120 days	5	20	22
121 - 180 days	17	41	41
6 Months or More	14	-	-
Total	100%	100%	100%

**Characteristics of Travelers from Germany to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Germany (n = 332)	Leisure Visitors from Germany (n = 219)
Travel Companions**			
Business Associates	10%	5%	1%
Family/Relatives	23	29	39
Friends	12	14	19
Spouse	27	23	28
Tour Group	2	1	2
Traveling Alone	39	44	31
Average Travel Party Size	1.5	1.4	1.6
Median Travel party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	82%	77%
Private Home	28	23	28
Other	4	4	5
Length of Stay			
Mean Nights in the U.S.	21.2	21.0	20.8
Mean Nights in California	11.0	9.9	8.8
% of California Nights	52%	47%	42%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	24%	31%
Average Trips to the U.S. in Past Year	2.0	2.2	1.6
Average Trips to the U.S. in Past 5 Years	6.3	6.9	4.0
Average Number of States Visited	2.0	2.3	2.4
Average Number of Destinations Visited	2.9	3.4	3.7
Places Visited in the U.S.**			
Los Angeles	53%	46%	49%
San Francisco	49	55	60
Las Vegas	28	31	39
New York City	17	21	24
San Diego	13	15	13
San Jose	7	8	3
Anaheim-Santa Ana	7	5	5
Yosemite	5	5	7
Grand Canyon	4	6	9
Chicago	4	3	3
DC Metro Area	4	1	1
Monterey-Salinas	4	6	8
Seattle	3	5	4
Sacramento	3	4	4
Riverside/San Bernardino	3	5	6
Santa Barbara	3	5	6
Oakland	3	2	2

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

** Multiple response question. Table may add to more than 100%.

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Germany to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Germany (n = 332)	Leisure Visitors from Germany (n = 219)
Activities Experienced While in the U.S.**			
Dining Out	87%	85%	83%
Shopping	85	85	83
Sightseeing in Cities	53	47	52
Historical Places	44	50	58
Visiting Small Towns	36	40	48
National Parks	35	48	61
Amusement/Theme Parks	34	32	38
Touring Countryside	30	50	58
Cultural Heritage Sites	28	48	55
Casinos/Gambling	24	23	27
Art Gallery/Museum	23	25	25
Guided Tours	22	19	21
Transportation While in the U.S.**			
Taxi/Limousine	42%	39%	37%
Rented Auto	40	55	61
Airlines in U.S.	36	36	36
Company or Private Auto	28	22	21
City Subway/Tram/Bus	26	27	29
Railroad between Cities	11	10	61
Bus between Cities	9	7	7
Motor Home/Camper	2	4	5
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,400	\$3,636
Per Visitor/Trip (U.S.)	2,607	2,382	2,269
Per Visitor Per Day	123	114	109
Per Visitor/Trip (California)	\$1,353	\$1,129	\$959
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$901	\$716
Food/Beverages	526	479	496
Gifts/Souvenirs	450	260	290
Transportation in the U.S.	425	432	465
Entertainment	234	168	181
Expenses at the Airport	37	21	22
Other	135	120	100
Total Spending Per Visitor/Trip	\$2,607	\$2,382	\$2,269

**Characteristics of Travelers from Germany to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Germany (n = 332)	Leisure Visitors from Germany (n = 219)
Payment Method for Trip Expenses			
Credit Cards	53%	65%	61%
Cash	37	27	30
Debit Cards	6	3	3
Travelers Checks	3	5	7
Total	100%	100%	100%
Age			
Average Age - Males	41	42	41
Average Age - Females	38	40	39
Occupation			
Manager/Executive	34%	32%	27%
Professional/Technical	32	34	34
Student	8	10	10
Clerical/Sales	7	11	13
Retired	6	5	7
Other	13	10	10
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	5%	5%
\$20,000 - \$39,999	10	8	7
\$40,000 - \$59,999	13	13	16
\$60,000 - \$79,999	11	12	12
\$80,000 - \$99,999	11	11	14
\$100,000 - \$119,999	11	8	9
\$120,000 - \$139,999	7	9	9
\$140,000 - \$159,999	6	12	13
\$160,000 - \$179,999	4	5	4
\$180,000 - \$199,999	3	2	1
\$200,000 and over	18	16	12
Total	100%	100%	100%
Average Annual Income	\$107,200	\$111,400	\$105,600