

CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2009

Germany was California's fourth largest overseas market with approximately 355,000 visitors to California in 2009. Collectively visitors from Germany spent approximately \$355 million in California.

German visitors to California during 2009 reported spending \$82 per day during a 12.2 night average stay or approximately \$1,000 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

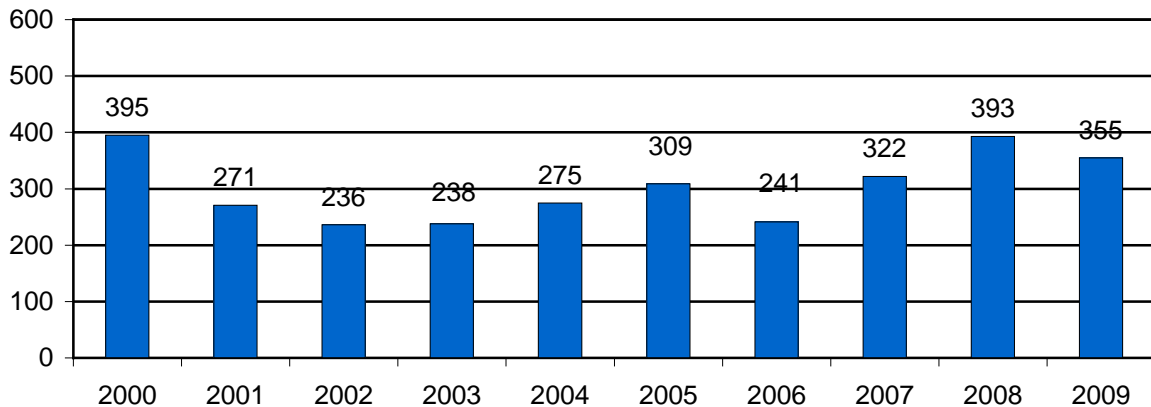
Visitors From Germany

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2009	1,686,825	21.0%	355,000

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, 2000-2009 (in 000s)



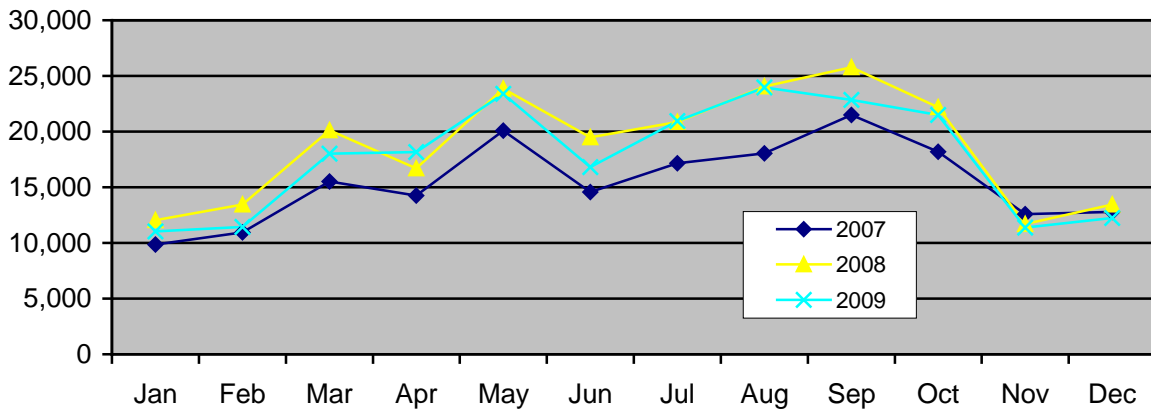
Source: International Trade Administration, Office of Travel and Tourism Industries.

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. Since then, there has been a steady growth in the number of visitors to Germany with the exception of a sharp drop in 2006 and a slight drop in 2009. Visitation to California from Germany dipped in 2009 to 355,000 down from the previous year's high.

German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were similar during most of 2009 as in 2008. The volume of German residents arriving at California ports-of-entry peaked in May and August. The lowest volumes of German arrivals were recorded in January and November.

**Residents of Germany
Monthly Port of Entry Arrivals to CA
2007-2009**



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 and travel guides when planning their trip
- Have longer trip planning and advance airline booking horizons
- Mention safety reputation as a main factor in selecting an airline
- Visit national parks, tour the countryside, and visit cultural heritage sites
- Make use of a rental vehicle 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
- Make use of a taxi/limousine for transportation while in the U.S.
- Use cash to pay for trip expenses

**Characteristics of Travelers from
Germany to California, 2009**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Germany (n = 326)	Leisure Visitors from Germany (n = 223)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	58%	74%
Business/Professional	22%	14%	-
Visit Friends/Relatives	21%	20%	26%
Convention/Conference	6%	4%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	72%	85%
Visit Friends/Relatives	37%	40%	41%
Business/Professional	26%	19%	4%
Convention/Conference	8%	6%	-
Sources Used to Plan Trip**			
Airlines Directly	23%	29%	28%
Corporate Travel Department	8%	6%	3%
Personal Computer	43%	48%	51%
Friends/Relatives	18%	19%	24%
Newspapers/Magazines	3%	3%	3%
State/City Travel Office	4%	23%	26%
Tour Company	7%	6%	8%
Travel Agency	40%	28%	24%
Travel Guides	10%	20%	24%
Advance Planning for Trip			
7 days or less	7%	6%	3%
8 - 30 days	28%	16%	11%
31 - 60 days	19%	14%	12%
61 - 90 days	12%	12%	12%
More than 3 Months	34%	52%	62%
Total	100%	100%	100%
Average Planning Time in Days	100 days	133 days	151 days
Advance Airline Reservations			
7 days or less	13%	9%	6%
8 - 30 days	38%	25%	18%
31 - 60 days	16%	11%	9%
61 - 90 days	10%	15%	17%
91 - 120 days	6%	13%	16%
121 - 180 days	10%	15%	17%
6 Months or More	7%	12%	17%
Total	100%	100%	100%
Average Booking in Days	67 days	94 days	112 days

**Characteristics of Travelers from Germany to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Germany (n = 326)	Leisure Visitors from Germany (n = 223)
Means of Booking Air Trip			
Airlines Directly	13%	14%	15%
Corporate Travel Department	9%	8%	4%
Personal Computer	25%	28%	29%
Travel Agent	46%	44%	44%
Travel Club	1%	-	-
Tour Operator	5%	4%	6%
Other/Don't Know	2%	2%	2%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	33%	38%
Schedule	13%	11%	11%
Non-Stop Flight	12%	16%	13%
Mileage Bonus/Frequent Flyer Program	10%	10%	10%
Previous Good Experience	9%	3%	2%
Safety Reputation	6%	14%	14%
Airline Loyalty	4%	2%	1%
In-flight Service	5%	1%	2%
Employer policy	3%	4%	3%
Other	6%	6%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	79%	83%
Executive/Business	17%	18%	15%
First Class	2%	3%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	16%	21%
No	86%	84%	79%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	2%	3%
8 - 30 days	24%	-	1%
31 - 60 days	13%	9%	9%
61 - 90 days	13%	16%	17%
91 - 120 days	8%	23%	19%
121 - 180 days	18%	20%	20%
6 Months or More	20%	30%	31%
Total	100%	100%	100%

**Characteristics of Travelers from Germany to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Germany (n = 326)	Leisure Visitors from Germany (n = 223)
Travel Companions**			
Business Associates	8%	5%	-
Family/Relatives	25%	25%	30%
Friends	11%	13%	17%
Spouse	28%	29%	36%
Tour Group	2%	-	-
Traveling Alone	38%	41%	32%
Average Travel Party Size	1.6	1.5	1.6
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	80%	79%
Private Home	30%	29%	29%
Other	4%	4%	4%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	23.8 nights	19.8 nights
Mean Nights in California	11.7 nights	12.2 nights	10.0 nights
% of California Nights	52%	51%	51%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	30%	32%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.4 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	6.1 trips	5.2 trips
Average Number of States Visited	2.1 states	2.4 states	2.5 states
Average Number of Destinations Visited	3.0 dest.	3.5 dest.	3.9 dest.
Places Visited in the U.S.**			
Los Angeles	55%	47%	48%
San Francisco	48%	55%	60%
Las Vegas	30%	35%	42%
New York City	18%	22%	23%
San Diego	13%	13%	12%
Anaheim-Santa Ana	7%	6%	5%
Grand Canyon	7%	12%	16%
San Jose	6%	5%	3%
Yosemite	4%	5%	4%
Chicago	4%	6%	6%
DC Metro Area	4%	4%	5%
Monterey-Salinas	4%	4%	5%
Riverside/San Bernardino	4%	5%	7%
Seattle	3%	1%	1%
Sacramento	3%	4%	4%
Santa Barbara	3%	5%	5%
Oakland	2%	3%	3%

* 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
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Germany (n = 326)	Leisure Visitors from Germany (n = 223)
Activities Experienced While in the U.S.**			
Shopping	87%	83%	84%
Dining Out	86%	84%	87%
Sightseeing in Cities	56%	51%	58%
Historical Places	45%	50%	57%
National Parks	39%	58%	67%
Amusement/Theme Parks	39%	37%	41%
Visiting Small Towns	38%	44%	47%
Cultural Heritage Sites	32%	49%	57%
Touring Countryside	31%	50%	54%
Casinos/Gambling	27%	26%	30%
Art Gallery/Museum	26%	27%	29%
Guided Tours	24%	22%	27%
Transportation While in the U.S.**			
Airlines in U.S.	39%	34%	32%
Taxi/Limousine	39%	26%	25%
Rented Auto	38%	45%	45%
Company or Private Auto	29%	25%	25%
City Subway/Tram/Bus	26%	30%	29%
Railroad between Cities	11%	17%	17%
Bus between Cities	10%	8%	10%
Motor Home/Camper	2%	7%	9%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$2,932	\$2,297
Per Visitor/Trip (U.S.)	\$2,308	\$1,943	\$1,402
Per Visitor Per Day	\$103	\$82	\$71
Per Visitor/Trip (California)	\$1,205	\$1,000	\$710
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$646	\$351
Food/Beverages	\$463	\$483	\$361
Gifts/Souvenirs	\$395	\$270	\$187
Transportation in the U.S.	\$348	\$300	\$266
Entertainment	\$234	\$164	\$165
Expenses at the Airport	\$34	\$25	\$18
Other	\$174	\$55	\$53
Total Spending Per Visitor/Trip	\$2,308	\$1,943	\$1,402

**Characteristics of Travelers from Germany to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Germany (n = 326)	Leisure Visitors from Germany (n = 223)
Payment Method for Trip Expenses			
Credit Cards	50%	62%	58%
Cash	41%	31%	33%
Debit Cards	7%	3%	3%
Travelers Checks	2%	4%	6%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	42 years	43 years
Average Age - Females	39 years	39 years	40 years
Occupation			
Professional/Technical	35%	27%	26%
Manager/Executive	28%	25%	19%
Student	10%	16%	16%
Retired	8%	7%	10%
Clerical/Sales	7%	10%	14%
Other	13%	14%	15%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	8%	10%
\$20,000 - \$39,999	14%	7%	8%
\$40,000 - \$59,999	14%	9%	11%
\$60,000 - \$79,999	13%	12%	13%
\$80,000 - \$99,999	11%	21%	23%
\$100,000 - \$119,999	9%	14%	12%
\$120,000 - \$139,999	6%	10%	9%
\$140,000 - \$159,999	5%	6%	3%
\$160,000 - \$179,999	3%	2%	2%
\$180,000 - \$199,999	3%	2%	2%
\$200,000 and over	12%	10%	8%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$97,800	\$91,300