

CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2010

Germany was California's sixth largest overseas market with approximately 388,000 visitors to California in 2010. Collectively visitors from Germany spent approximately \$325 million in California.

German visitors to California during 2010 reported spending \$89 per day during a 9.4 night average stay or approximately \$837 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

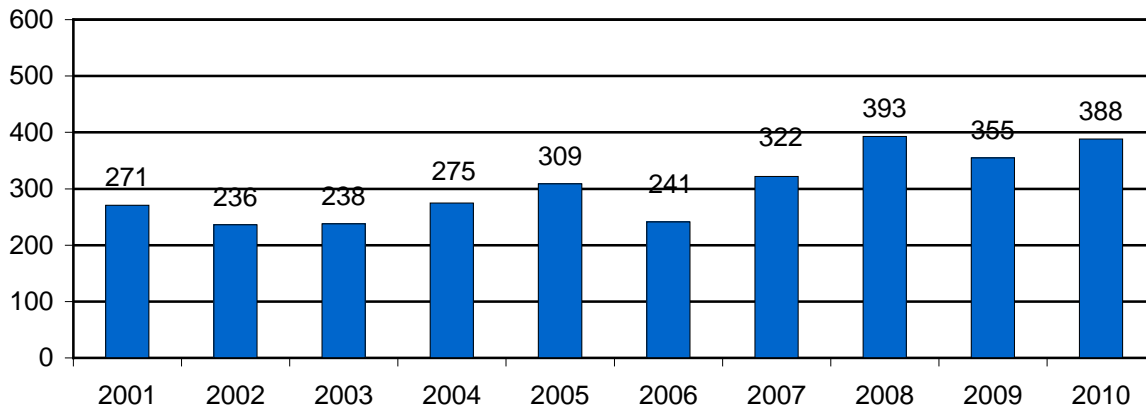
Visitors From Germany

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2010	1,726,193	22.5%	388,000

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, 2001-2010 (in 000s)



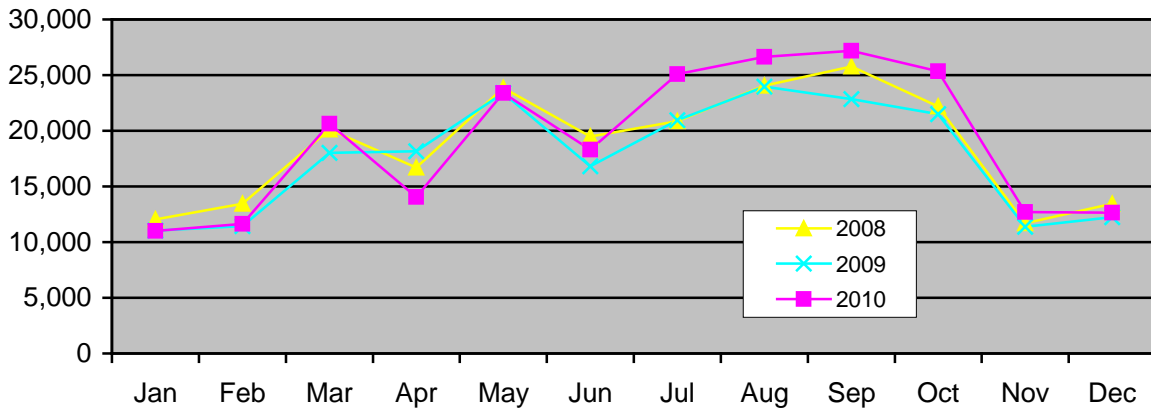
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 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 rose in 2010 to 388,000 from the previous year (355,000).

German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were similar during most of 2010 as in 2009 & 2008. The volume of German residents arriving at California ports-of-entry peaked in August and September. The lowest volumes of German arrivals were recorded in January and December.

**Residents of Germany
Monthly Port of Entry Arrivals to CA
2008-2010**



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, personal computers, and travel guides when planning their trip
- Have longer trip planning and advance airline booking horizons
- Book their air trip with a personal computer
- Stay in a hotel/motel
- Visit San Francisco and Las Vegas while in the U.S.
- Visit historical places, 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:

- 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, 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Germany (n = 419)	Leisure Visitors from Germany (n = 288)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	60%	80%
Visit Friends/Relatives	22%	16%	21%
Business/Professional	21%	15%	-
Convention/Conference	5%	4%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	72%	89%
Visit Friends/Relatives	39%	33%	34%
Business/Professional	24%	19%	4%
Convention/Conference	9%	9%	2%
Sources Used to Plan Trip**			
Personal Computer	44%	56%	62%
Travel Agency	40%	24%	21%
Airlines Directly	23%	27%	31%
Friends/Relatives	17%	21%	25%
Travel Guides	10%	20%	26%
Corporate Travel Department	8%	7%	2%
Tour Company	5%	9%	12%
State/City Travel Office	4%	21%	24%
Newspapers/Magazines	3%	4%	4%
Advance Planning for Trip			
7 days or less	6%	5%	2%
8 - 30 days	28%	16%	10%
31 - 60 days	20%	14%	11%
61 - 90 days	12%	12%	13%
More than 3 Months	34%	54%	64%
Total	100%	100%	100%
Average Planning Time in Days	98 days	140 days	159 days
Advance Airline Reservations			
7 days or less	12%	9%	3%
8 - 30 days	38%	22%	14%
31 - 60 days	17%	16%	18%
61 - 90 days	10%	12%	13%
91 - 120 days	7%	10%	13%
121 - 180 days	10%	18%	21%
6 Months or More	7%	14%	18%
Total	100%	100%	100%
Average Booking in Days	68 days	101 days	119 days

* 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Germany (n = 419)	Leisure Visitors from Germany (n = 288)
Means of Booking Air Trip			
Travel Agent	46%	40%	38%
Personal Computer	26%	36%	40%
Airlines Directly	13%	11%	13%
Corporate Travel Department	8%	7%	2%
Tour Operator	4%	4%	5%
Travel Club	1%	-	-
Other/Don't Know	2%	2%	2%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	36%	42%
Schedule	14%	9%	6%
Non-Stop Flight	14%	20%	22%
Mileage Bonus/Frequent Flyer Program	10%	7%	8%
Previous Good Experience	9%	6%	2%
Safety Reputation	8%	10%	10%
Airline Loyalty	4%	2%	2%
In-flight Service	4%	2%	2%
Employer policy	3%	2%	1%
Other	6%	7%	5%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	81%	90%
Executive/Business	15%	17%	8%
First Class	2%	2%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	13%	17%
No	86%	87%	83%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	27%	7%	6%
31 - 60 days	15%	2%	1%
61 - 90 days	10%	6%	7%
91 - 120 days	11%	29%	32%
121 - 180 days	20%	33%	31%
6 Months or More	14%	23%	24%
Total	100%	100%	100%

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.
Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Germany to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Germany (n = 419)	Leisure Visitors from Germany (n = 288)
Travel Companions**			
Traveling Alone	39%	41%	33%
Spouse	27%	25%	34%
Family/Relatives	25%	21%	25%
Friends	11%	16%	19%
Business Associates	8%	6%	-
Tour Group	2%	1%	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	78%	84%	81%
Private Home	29%	26%	30%
Other	4%	5%	5%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	24.8 nights	19.5 nights
Mean Nights in California	11.3 nights	9.4 nights	8.5 nights
% of California Nights	50%	38%	44%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	31%	35%
Average Trips to the U.S. in Past Year	1.8 trips	1.9 trips	1.5 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.7 trips	3.8 trips
Average Number of States Visited	2.1 states	2.4 states	2.6 states
Average Number of Destinations Visited	3.0 dest.	3.7 dest.	4.1 dest.
Places Visited in the U.S.**			
Los Angeles	60%	54%	55%
San Francisco	47%	58%	62%
Las Vegas	29%	43%	53%
New York City	16%	11%	12%
San Diego	14%	19%	20%
Flagstaff	8%	15%	21%
Anaheim-Santa Ana	7%	4%	4%
Grand Canyon	5%	9%	13%
San Jose	5%	4%	3%
DC Metro Area	5%	4%	4%
Yosemite	4%	6%	8%
Chicago	4%	5%	5%
Monterey-Salinas	4%	4%	5%
Miami	4%	2%	3%
Riverside/San Bernardino	4%	7%	8%
Seattle	3%	2%	2%
Sacramento	3%	4%	5%

* 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Germany (n = 419)	Leisure Visitors from Germany (n = 288)
Activities Experienced While in the U.S.**			
Shopping	88%	83%	84%
Dining Out	85%	88%	87%
Sightseeing in Cities	57%	50%	54%
Historical Places	47%	57%	67%
Amusement/Theme Parks	40%	34%	39%
National Parks	38%	56%	66%
Visiting Small Towns	38%	44%	48%
Cultural Heritage Sites	31%	51%	60%
Touring Countryside	31%	52%	59%
Art Gallery/Museum	26%	24%	27%
Casinos/Gambling	25%	31%	34%
Guided Tours	23%	20%	25%
Transportation While in the U.S.**			
Rented Auto	41%	53%	58%
Taxi/Limousine	39%	28%	24%
Airlines in U.S.	37%	32%	32%
Company or Private Auto	28%	26%	23%
City Subway/Tram/Bus	25%	27%	31%
Railroad between Cities	12%	14%	13%
Bus between Cities	10%	6%	7%
Motor Home/Camper	2%	5%	5%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$3,265	\$3,132
Per Visitor/Trip (U.S.)	\$2,435	\$2,216	\$1,990
Per Visitor Per Day	\$107	\$89	\$102
Per Visitor/Trip (California)	\$1,209	\$837	\$867
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$695	\$545
Food/Beverages	\$514	\$500	\$468
Gifts/Souvenirs	\$421	\$263	\$283
Transportation in the U.S.	\$384	\$402	\$390
Entertainment	\$243	\$189	\$164
Expenses at the Airport	\$34	\$21	\$20
Other	\$179	\$147	\$120
Total Spending Per Visitor/Trip	\$2,435	\$2,216	\$1,990

* 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Germany (n = 419)	Leisure Visitors from Germany (n = 288)
Payment Method for Trip Expenses			
Credit Cards	52%	63%	61%
Cash	39%	28%	29%
Debit Cards	7%	6%	6%
Travelers Checks	1%	3%	4%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	42 years	42 years
Average Age - Females	40 years	36 years	37 years
Occupation			
Professional/Technical	33%	27%	28%
Manager/Executive	29%	29%	22%
Student	10%	14%	12%
Retired	9%	6%	9%
Clerical/Sales	8%	12%	15%
Other	12%	11%	15%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	7%	7%
\$20,000 - \$39,999	13%	13%	15%
\$40,000 - \$59,999	14%	12%	15%
\$60,000 - \$79,999	13%	15%	17%
\$80,000 - \$99,999	11%	10%	10%
\$100,000 - \$119,999	11%	9%	8%
\$120,000 - \$139,999	7%	10%	12%
\$140,000 - \$159,999	6%	4%	4%
\$160,000 - \$179,999	3%	3%	3%
\$180,000 - \$199,999	3%	1%	-
\$200,000 and over	13%	17%	9%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$101,600	\$88,700

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.
Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."