

CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2007

Germany was California's fifth largest overseas market with approximately 322,000 visitors to California in 2007. Collectively visitors from Germany spent approximately \$355 million in California.

German visitors to California during 2007 reported spending \$95 per day during an 11.6 night average stay or approximately \$1,102 per visitor. The average spending for all overseas visitors to California was about \$1,166 (\$111 per day; 10.5 nights in California).

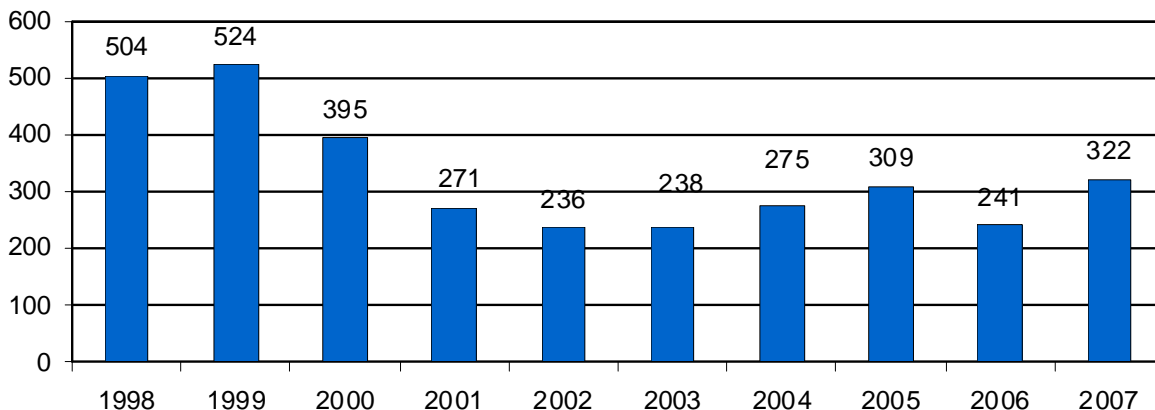
Visitors From Germany

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1997	1,994,296	26.7%	532,000
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

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, 1998-2007
(in 000s)**



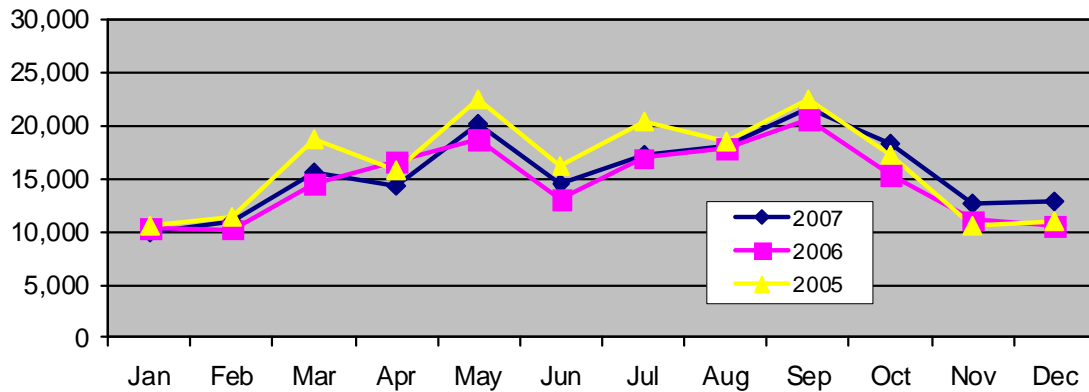
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 strengthened in 2007, 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 generally consistent in 2007 with the monthly pattern for 2005 and 2006. 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
2005-2007**



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:

- 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
- Visit historical places, 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
- Have a lower average annual household income

Conversely, visitors from Germany are less likely to:

- Make use of a travel agent when planning their trip
- Visit Los Angeles as part of 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, 2007

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Germany (n = 336)	Leisure Visitors from Germany (n = 180)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	37%	37%	63%
Visit Friends/Relatives	20	22	37
Business/Professional	31	31	-
Convention/Conference	8	7	-
Other Purpose	4	4	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	55%	54%	74%
Visit Friends/Relatives	38	34	48
Business/Professional	35	36	8
Convention/Conference	13	11	1
Sources Used to Plan Trip**			
Airlines Directly	19%	22%	26%
Corporate Travel Department	12	15	2
Personal Computer	36	42	52
Friends/Relatives	15	13	16
Newspapers/Magazines	3	2	3
State/City Travel Office	3	20	24
Tour Company	5	2	2
Travel Agency	48	37	36
Travel Guides	9	16	22
Advance Planning for Trip			
7 days or less	9%	11%	5%
8 - 30 days	36	23	14
31 - 60 days	20	20	18
61 - 90 days	11	14	19
More than 3 Months	25	33	44
Total	100%	100%	100%
Average Planning Time in Days	81	90	114
Advance Airline Reservations			
7 days or less	16%	14%	8%
8 - 30 days	43	32	20
31 - 60 days	16	21	23
61 - 90 days	8	12	19
91 - 120 days	6	5	7
121 - 180 days	6	10	16
6 Months or More	5	6	8
Total	100%	100%	100%
Average Booking in Days	55	67	91

* 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."; CIC Research, Inc.

**Characteristics of Travelers from Germany to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Germany (n = 336)	Leisure Visitors from Germany (n = 180)
Means of Booking Air Trip			
Airlines Directly	10%	8%	13%
Corporate Travel Department	12	16	-
Personal Computer	18	22	25
Travel Agent	54	49	54
Travel Club	-	-	-
Tour Operator	4	3	4
Other/Don't Know	2	2	4
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	29%	35%
Schedule	16	15	12
Non-Stop Flight	12	16	16
Mileage Bonus/Frequent Flyer Program	11	9	8
Previous Good Experience	9	9	6
Safety Reputation	7	6	7
Airline Loyalty	5	1	-
In-flight Service	5	1	2
Employer policy	4	6	4
Other	6	9	12
Airline Seating Area			
Economy/Tourist/Coach	78%	74%	81%
Executive/Business	19	24	17
First Class	4	3	2
Total	100%	100%	100%
Use of Package			
Yes	13%	10%	13%
No	87	90	87
Total	100%	100%	100%
Advance Package Booking			
7 days or less	5%	5%	-
8 - 30 days	32	28	13
31 - 60 days	18	28	36
61 - 90 days	11	8	8
91 - 120 days	11	5	7
121 - 180 days	8	19	27
6 Months or More	15	7	9
Total	100%	100%	100%

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**Characteristics of Travelers from Germany to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Germany (n = 336)	Leisure Visitors from Germany (n = 180)
Travel Companions**			
Business Associates	12%	7%	-
Family/Relatives	23	24	35%
Friends	8	9	12
Spouse	25	19	29
Tour Group	2	1	1
Traveling Alone	41	49	36
Average Travel Party Size	1.5	1.4	1.6
Type of Lodging**			
Hotel / Motel	78%	80%	74%
Private Home	29	24	32
Other	3	4	5
Length of Stay			
Mean Nights in the U.S.	19.2	20.6	21.8
Mean Nights in California	10.5	11.6	11.1
% of California Nights	55%	56%	51%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	21%	24%	33%
Average Trips to the U.S. in Past Year	2.0	2.2	1.8
Average Trips to the U.S. in Past 5 Years	6.6	6.9	4.7
Average Number of States Visited	2.0	2.1	2.2
Average Number of Destinations Visited	2.7	3.1	3.4
Places Visited in the U.S.**			
Los Angeles	51%	39%	50%
San Francisco	44	52	58
Las Vegas	23	26	35
New York City	15	12	13
San Diego	12	14	11
San Jose	8	14	3
Anaheim	8	6	5
Grand Canyon	4	7	8
Chicago	4	4	2
Yosemite	3	7	10
DC Metro Area	3	3	2
Seattle	3	7	2
Monterey	3	4	5
Sacramento	3	5	5
Riverside/San Bernardino	2	7	10
Oahu/Honolulu	2	2	3
Miami	2	2	1

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**Characteristics of Travelers from Germany to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Germany (n = 336)	Leisure Visitors from Germany (n = 180)
Activities Experienced While in the U.S.**			
Shopping	86%	83%	83%
Dining Out	86	87	85
Sightseeing in Cities	51	48	59
Historical Places	37	51	62
Amusement/Theme Parks	33	28	33
Visiting Small Towns	31	36	47
National Parks	30	44	57
Touring Countryside	27	45	57
Cultural Heritage Sites	24	36	45
Casinos/Gambling	23	18	23
Art Gallery/Museum	21	23	27
Guided Tours	21	15	18
Transportation While in the U.S.**			
Taxi/Limousine	41%	28%	21%
Airlines in U.S.	38	36	29
Rented Auto	36	51	49
Company or Private Auto	31	29	31
City Subway/Tram/Bus	21	23	26
Railroad between Cities	10	15	19
Bus between Cities	9	3	5
Motor Home/Camper	2	2	3
Spending by Category (Per Visitor/Trip)			
Lodging	\$657	\$689	\$415
Food/Beverages	399	435	391
Gifts/Souvenirs	364	255	291
Transportation in the U.S.	336	342	222
Entertainment	194	142	150
Expenses at the Airport	37	24	20
Other	148	60	69
Total Spending Per Visitor/Trip	\$2,135	\$1,947	\$1,558
Visitor Spending in the U.S.			
Per Travel Party Per Trip	\$3,235	\$2,644	\$2,447
Per Visitor/Trip	2,135	1,947	1,558
Per Person Per Day	111	95	72

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**Characteristics of Travelers from Germany to California
(2007 - cont.)**

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Payment Method for Trip Expenses			
Credit Cards	54%	65%	58%
Cash	39	29	33
Debit Cards	5	3	5
Travelers Checks	3	3	4
Total	100%	100%	100%
Age			
Average Age - Males	43.3	42.3	43.8
Average Age - Females	39.6	36.7	36.0
Occupation			
Manager/Executive	37%	34%	23%
Professional/Technical	34	35	34
Student	7	10	12
Clerical/Sales	7	6	9
Retired	6	6	9
Other	10	9	14
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	5%	8%
\$20,000 - \$39,999	11	10	12
\$40,000 - \$59,999	13	13	11
\$60,000 - \$79,999	13	10	9
\$80,000 - \$99,999	12	16	20
\$100,000 - \$119,999	10	11	11
\$120,000 - \$139,999	7	8	8
\$140,000 - \$159,999	5	2	2
\$160,000 - \$179,999	3	4	5
\$180,000 - \$199,999	3	4	1
\$200,000 and over	16	18	15
Total	100%	100%	100%
Average Annual Income	\$101,300	\$95,800	\$99,200

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