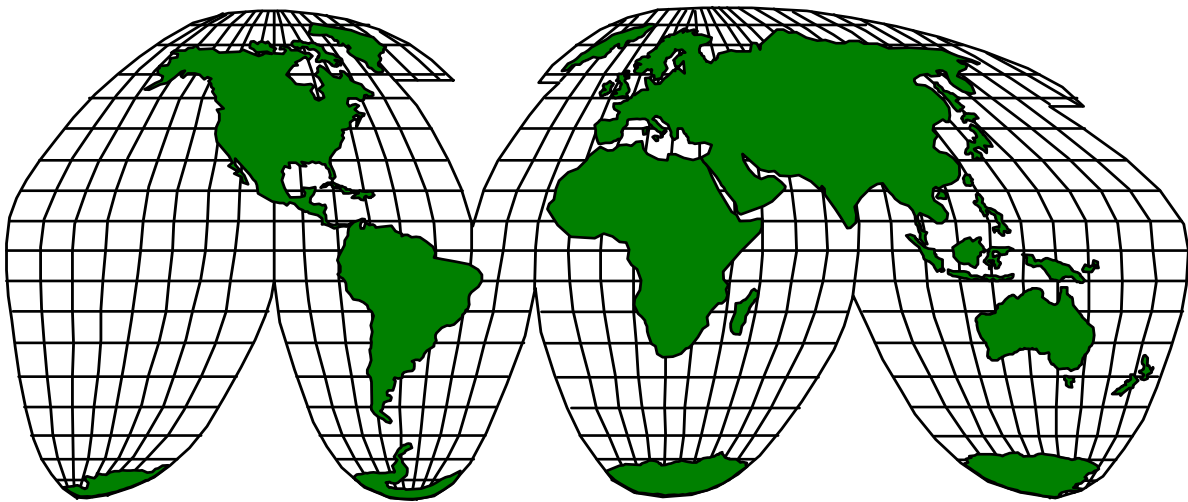


Overseas & Mexican Visitors To California

2008



A joint marketing venture of
the California Travel and Tourism Commission
and the California Business, Transportation and Housing Agency,
Division of Tourism

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**EXECUTIVE SUMMARY
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- **Total Overseas Market.** There were approximately 25.3 million overseas visitors to the U.S. in 2008, up 6.1% from 23.9 million in 2007. Approximately 5.5 million overseas visitors (21.7%) indicated California was a destination on their U.S. trip, up 6.1% from 5.2 million overseas visitors to California in 2007.
- **Mexican (Air).** There were approximately 1,708,000 Mexican travelers who arrived in the U.S. by air in 2008 (9.1% decrease from 2007). Approximately 378,000 (22.1%) of these Mexican travelers visited California during their U.S. trip (11.7% decrease from 2007).¹
- **Country of Origin.** California's top ten overseas visitor market countries were:

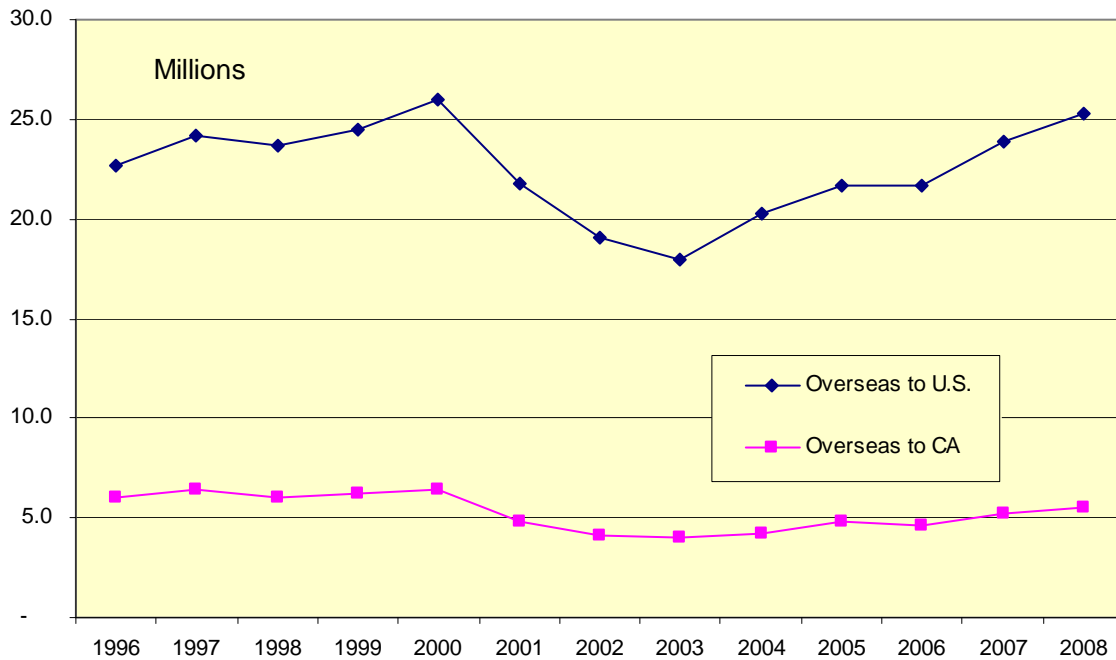
Overseas Visitors to California				
Rank	Country	2007	2008	Percentage Change
1)	United Kingdom	765,000	818,000	6.9%
2)	Japan	675,000	629,000	-6.8%
3)	Germany	322,000	393,000	22.0%
4)	Australia	333,000	341,000	2.4%
5)	France	237,000	301,000	27.0%
6)	South Korea	331,000	300,000	-9.4%
7)	China (excl. Hong Kong)	227,000	273,000	20.3%
8)	Taiwan (ROC)	201,000	189,000	-6.0%
9)	India	176,000	179,000	1.7%
10)	Netherlands	115,000	153,000	33.0%

In 2008, the U.K. and Japan combined generated slightly more than one-quarter of the overseas visitors to California. The number of U.K. visitors to California in 2008 increased by 7% from 765,000 in 2007, to 818,000 in 2008. Japanese visitor volume to California decreased by 7% from 675,000 in 2007, to 629,000 in 2008. There was an increase in the volume of overseas visitors to California for each of the top ten overseas visitor market countries with the exception of Japan (-7%), South Korea (-9%), and Taiwan (-6%). Visitors from the Netherlands (33%), followed by France (27%), Germany (22%), and China (20%) experienced the largest percentage increases in visitor market volume for 2008.

¹ The majority of Mexican visitors to California in 2008 arrived by ground transportation through a U.S. border port of entry. Mexican visitors arriving in the U.S. by ground transportation are not included in the "Survey of International Air Travelers" and are not included in this study. Please note that Canadians are also not included in the In-Flight Survey or this study.

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Overseas Visitors to the U.S. and California



- Market Share.** Among the ten largest overseas visitor markets, California's share of visitors from the U.K. Germany, and the Netherlands increased, while the market share for Australia, South Korea, China, Taiwan, and India decreased in 2008. The market share for Japan and France remained the same.

California Market Share of U.S. Visitors from Selected Overseas Countries

Rank By Volume	Country	2007	2008
1)	United Kingdom	17%	18%
2)	Japan	19%	19%
3)	Germany	21%	22%
4)	Australia	50%	49%
5)	France	24%	24%
6)	South Korea	41%	40%
7)	China (excl. Hong Kong)	57%	56%
8)	Taiwan (ROC)	65%	64%
9)	India	31%	30%
10)	Netherlands	23%	25%

- Change in Overall Market Share Over Time.** California's market share of overseas visitors to the U.S. has recorded a general decline since the late 1990s. In 1997, California's market share of overseas visitors to the U.S. was at a high of 26.6%. By 2004, the market share was at a low of 20.7%, but has increased slightly in recent years and remained stable in 2007 and 2008 at 21.7%.

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- **Main Destination.** Three-quarters (75%) of overseas visitors to California indicated that California was their main destination, similar to that reported in previous years.
- **California MSAs Visited.** Similar to last year's data, the most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California included Los Angeles - Long Beach (54%) and San Francisco (50%), followed by San Diego (13%), San Jose (7%), and Anaheim-Santa Ana (7%).
- **Purpose of Trip.** Overseas travelers to California listed multiple reasons for their trip including: vacation (63%), visiting friends/relatives (37%), and business (31%). Compared to other overseas travelers, visitors from Australia, Italy, and the U.K. reported the highest proportion of travelers on vacation/holiday (77%, 73%, and 73% respectively), while visitors from Taiwan reported the highest proportion of those visiting friends and relatives (52%). Visitors from China and India (59% each respectively) reported the highest proportion of business travelers.
- **Leisure/Recreation Activities.** Dining (87%), shopping (85%), and sightseeing (53%) were the most common leisure and recreation activities of overseas visitors to California in 2008. More than nine in ten visitors from the U.K. and Australia reported dining in restaurants, while more than nine in ten visitors from China, Taiwan, and Australia reported shopping as a recreation activity.
- **Use of Travel Agents.** Travel agent usage has declined steadily over the last several years. Travel agents booked 48% of air trips in 2008, compared with 54% in 2007, 55% in 2006, and 57% in 2005. Visitors from Australia (71%) continue to report the highest dependence on travel agents to book their air trips (down from 77% in 2007). Only 24% of overseas travelers who pre-booked their lodging relied on travel agents to make lodging arrangements, 14% reported contacting the hotels/motels directly, and 11% reported that their company's travel department booked their lodging.
- **Accommodations.** The same as in 2007, almost eight in ten overseas travelers to California in 2008 reported staying in hotels or motels at some time during their trip (78%). Visitors from Taiwan, India, and Mexico (air) reported the lowest hotel usage (60%, 63%, and 66% respectively).
- **Sex and Age.** Similar to results from previous years, almost two-thirds (64%) of overseas travelers to California during 2008 were adult males and one-third (36%) were adult females. During 2008, the average age of traveling adult males (43 years old) was four years older than the average traveling adult female (39 years old).
- **Length of Stay.** During 2008, California's overseas visitors spent an average of 21 nights in the U.S. and 11 nights in California. In 2007, these numbers were 19 nights and 11 nights respectively. Once again, visitors from India reported the highest number of nights stayed in the U.S. (41 nights) as well as in California (23 nights). Visitors from Japan and Mexico (air) reported the least amount of time spent in the U.S. (13 nights and 12 nights, respectively) as well as in California (8 nights and 7 nights, respectively). Visitors from Italy also spent an average of eight nights in California.

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- **Use of Domestic Airlines and Rental Cars.** Approximately four in ten overseas visitors to California made use of a taxi/cab/limousine or rental car (42% and 40%, respectively) as a means of transportation within the U.S. These were followed by use of airlines (36%), a company or private auto (28%), and the city subway/tram/bus (26%). Visitors from Australia were most likely to make use of a taxi/cab/limousine (61%), while visitors from Germany, Italy, and France were most likely to rent an auto (55% each). Visitors from Australia were the most likely to fly between U.S. cities (60%), and visitors from South Korea, Taiwan, and China were most likely to make use of a company or private auto (46%, 46%, and 42% respectively).
- **Advance Trip Decision.** The average overseas visitor to California decides to travel a median of 60 days prior to the actual trip, 10 days more than that reported in 2007. In 2008 visitors from Australia reported the longest trip planning time (median = 120 days), followed by visitors from Germany (95 days).
- **Advance Ticket Purchase.** Overseas visitors to California purchased their airline ticket a median of 30 days prior to the actual trip, the same as that reported in 2007, 2006, and 2005. Visitors from China and Mexico (air) reported the shortest time frame from airline reservation to departure date (median = 15 days). On the other hand, visitors from Australia reported the longest time frame from airline reservation to departure (median = 85 days).
- **Travel Party Size.** Consistent with results from previous years, the average travel party size for all overseas visitors to California during 2008 was 1.5 people. Visitors from South Korea were the most likely to include children (11%).
- **Prepaid Trip Package.** Package tours were used by 11% of all 2008 visitors to California, down 2% from that reported in 2007. Use of package tours appears to be on a consistent decline over time. During 2008, visitors to California who reported the highest use of inclusive tours were from China (25%) and Italy (24%).
- **Expenditures in the U.S. by Overseas and Mexican (air) Visitors to California.** Expenditures in the U.S. during 2008 rose \$12 from 2007, averaging \$123 per person per day (average expenditure in 2007 was \$111 per person per day). In 2008, overseas visitors' total trip expenditures averaged \$5,017 compared with \$4,465 in 2007. Visitors to California from Japan (\$148) and from Australia (\$130) reported the highest average daily expenditures.
- **Expenditures in California.** In 2008, the total number of overseas visitors to California was 5,501,000. These visitors reported spending \$123 per person per day and they stayed an average of 11 nights in California. Thus, each visitor to California was worth an average of about \$1,353, up from \$1,166 in 2007. Due to the increase in the total number of visitors to California, as well as the increase in the reported spending as well as nights in California, the total estimated spending in California increased in 2008 to more than \$7.4 billion compared with \$6.0 billion in 2007.
- **Expenditures in California - Mexican (air) visitors.** In 2008, the total number of Mexican (air) visitors to California was 416,000, down from 428,000 in 2007. These visitors reported spending \$97 per person per day and they stayed an average of 7.2 nights in California. Thus, each visitor to California was worth an average of about \$698. The total estimated spending by Mexican (air) visitors to California amounted to \$291 million in 2008, compared with \$389 million in 2007.

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OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA*
SELECTED HIGHLIGHTS
(2008)

	All Overseas Visitors	United Kingdom	Germany	France	Italy	Australia	China w/o HK	India	Japan	South Korea	Taiwan	Mexico (Air)
Estimated Travelers	5,501,000	818,000	393,000	301,000	151,000	341,000	273,000	179,000	629,000	300,000	189,000	378,000
Business (% Change 2007/2008)	31% (-13%)	24% (-20%)	24% (-35%)	29% (+28%)	22% (-22%)	17% (-10%)	59% (-6%)	59% (-3%)	37% (-7%)	35% (-7%)	41% (+15%)	22% (+12%)
Vacation (% Change 2007/2008)	63% (+15%)	73% (+12%)	70% (+30%)	59% (-3%)	73% (+8%)	77% (0%)	44% (+9%)	29% (+8%)	50% (+2%)	55% (+12%)	47% (-17%)	50% (-4%)
Adv. Trip Decision (mean days)	91.6	114.3	131.0	97.0	91.8	151.0	51.0	48.4	57.4	54.1	47.3	51.3
Adv. Air Decision (mean days)	59.8	84.0	82.1	65.4	61.0	95.3	23.9	29.1	37.7	31.1	29.8	27.7
Mean Travel Party Size	1.5	1.6	1.4	1.5	1.6	1.6	1.7	1.2	1.6	1.6	1.5	1.6
Median Male Age (years)	41	44	42	40	37	43	40	37	43	40	40	41
Median Female Age (years)	38	43	39	39	34	42	35	40	38	35	38	37
Mean Household Income (\$000)	\$107	\$127	\$111	\$89	\$94	\$110	\$70	\$71	\$108	\$95	\$96	\$73
Nights CA (mean) (median) (Change in mean nts 2007/2008)	11.0 6.0 (+0.5 nts)	8.6 6.0 (-0.7 nts)	9.9 6.0 (-1.7 nts)	10.0 8.0 (-1.7 nts)	8.1 6.0 (-0.8 nts)	8.8 5.0 (+0.7 nts)	11.4 4.0 (-0.8 nts)	22.7 7.0 (+2.2 nts)	8.4 4.0 (+0.7 nts)	18.4 6.0 (+6.3 nts)	14.1 6.0 (+0.2 nts)	7.2 4.0 (-0.7 nts)
Hotel/Motel	78%	82%	82%	82%	84%	83%	76%	63%	84%	70%	60%	66%
Private Home	28%	22%	23%	28%	20%	23%	22%	53%	21%	36%	51%	35%
Rental Car	40%	43%	55%	55%	55%	35%	32%	29%	35%	32%	34%	38%
Mean Total Trip Exp. (Change in mean trip exp 2007/2008)	\$5,017 (+\$552)	\$4,129 (-\$67)	\$4,524 (+\$256)	\$4,161 (+\$846)	\$4,922 (+\$436)	\$6,407 (+\$916)	\$5,020 (+\$3)	\$5,562 (-\$129)	\$4,151 (+\$80)	\$4,363 (+\$401)	\$4,585 (+\$178)	\$2,778 (+\$100)
Mean Spending /day in CA	\$123	\$123	\$114	\$104	\$124	\$130	\$128	\$69	\$148	\$67	\$107	\$97
Spending /visitor in CA	\$1,353	\$1,058	\$1,129	\$1,040	\$1,004	\$1,144	\$1,459	\$1,566	\$1,243	\$1,233	\$1,509	\$698
Est. State Spending Impact	\$7,443 Mil.	\$865 Mil.	\$444 Mil.	\$313 Mil.	\$152 Mil.	\$390 Mil.	\$398 Mil.	\$280 Mil.	\$782 Mil.	\$370 Mil.	\$285 Mil.	\$264 Mil.

*Does not include Canadian visitors. Only Mexican visitors arriving in the U.S. by air were included in the study.

Source: ITA/OTTI, Survey of International Air Travelers, 2008, CIC Research, Inc., and the California Travel and Tourism Commission.

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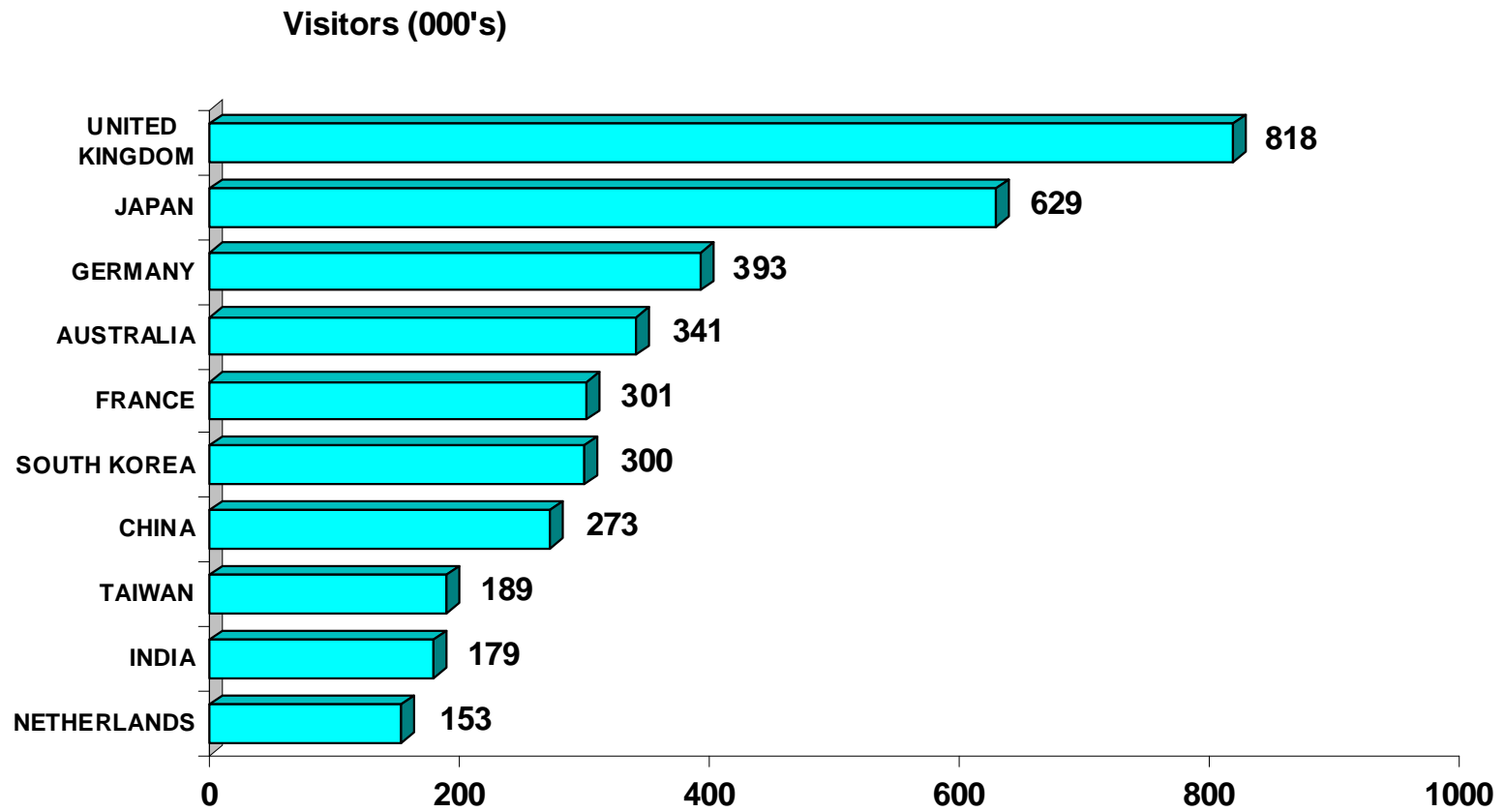
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA*
SELECTED HIGHLIGHTS
(2008)

	All Overseas Visitors	United Kingdom	Germany	France	Italy	Australia	China w/o HK	India	Japan	South Korea	Taiwan	Mexico (Air)
Estimated Travelers	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
Business	3%	2%	3%	-	2%	5%	7%	4%	3%	4%	3%	2%
Vacation	85%	90%	88%	90%	95%	85%	71%	54%	83%	81%	72%	68%
Adv. Trip Decision (mean days)	118.0	139.1	153.8	127.0	109.2	169.1	65.2	74.4	71.6	58.6	61.7	61.5
Adv. Air Decision (mean days)	79.1	105.2	96.9	87.9	74.5	108.4	38.6	47.9	50.2	35.0	35.3	30.1
Mean Travel Party Size	1.7	1.8	1.6	1.9	1.9	1.7	1.7	1.6	1.8	1.6	1.7	1.7
Median Male Age (years)	42	46	41	39	36	41	43	54	41	39	45	34
Median Female Age (years)	38	43	39	39	35	42	37	45	38	39	38	39
Mean Household Income (\$000)	\$102	\$113	\$106	\$75	\$97	\$106	\$77	\$70	\$95	\$99	\$96	\$60
Nights CA (mean)	10.4	7.9	8.8	11.0	7.7	8.6	20.5	24.2	7.1	15.7	13.0	9.3
(median)	7	6	7	9	6	6	5	10	5	8	8	6
Hotel/Motel	75%	80%	77%	76%	86%	82%	58%	39%	74%	52%	43%	51%
Private Home	34%	24%	28%	37%	20%	24%	42%	77%	35%	61%	75%	49%
Rental Car	44%	46%	61%	57%	57%	35%	26%	28%	33%	22%	32%	43%
Mean Spending /day in CA	\$112	\$109	\$109	\$83	\$1285	\$124	\$81	\$35	\$151	\$79	\$97	\$76
Spending /visitor in CA	\$1,165	\$861	\$959	\$913	\$986	\$1,066	\$1,661	\$847	\$1,072	\$1,240	\$1,261	\$707
Mean Total Trip Expenditure	\$4,112	\$3,430	\$4,055	\$3,039	\$4,197	\$5,934	\$4,648	\$3,502	\$3,193	\$3,637	\$3,265	\$2,560

*Does not include Canadian visitors. Only Mexican visitors arriving in the U.S. by air were included in the study.

Source: ITA/OTTI, Survey of International Air Travelers, 2008
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 1
TOP TEN COUNTRIES OF RESIDENCE
OVERSEAS VISITORS TO CALIFORNIA
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

**Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA
(2008)**

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	2007/2008 Percent Change	Estimated Overseas Visitors To California	2007/2008 Percent Change*	CA Share Of Visitors From This Country
EUROPE	12,782,683	12.1%	2,431,000	17.7%	19.0%
W. EUROPE	12,198,081	12.0%	2,357,000	18.2%	19.3%
Austria	158,764	20.9%	30,000	15.4%	18.6%
Belgium	265,383	22.5%	35,000	-30.0%	13.3%
Denmark	256,604	17.9%	45,000	-8.2%	17.7%
France	1,243,942	24.7%	301,000	27.0%	24.2%
Germany	1,782,299	16.9%	393,000	22.0%	22.1%
Ireland	531,198	8.2%	77,000	18.5%	14.5%
Italy	779,463	22.9%	151,000	21.8%	19.4%
Netherlands	607,802	19.9%	153,000	33.0%	25.1%
Norway	213,983	23.8%	30,000	-14.3%	14.1%
Spain	658,333	27.5%	101,000	114.9%	15.4%
Sweden	397,017	17.6%	67,000	-4.3%	16.9%
Switzerland	341,955	15.4%	74,000	32.1%	21.5%
United Kingdom	4,564,895	1.5%	818,000	6.9%	17.9%
Other Western Europe	396,443	12.2%	82,000	148.5%	20.7%
E. EUROPE	584,602	14.0%	74,000	29.8%	12.7%
CARIBBEAN	1,201,149	-8.8%	15,000	-6.3%	1.3%
Bahamas	180,914	-29.4%	1,000	--	0.4%
Dominican Rep	226,184	-14.1%	6,000	--	2.6%
Jamaica	204,982	-7.5%	--	--	--
Trinidad & Tobago	147,613	3.2%	1,000	--	0.5%
Other Caribbean	441,456	2.1%	7,000	16.7%	1.6%

Note: "--" Represents an estimate of less than 500 visitors or a response of less than 0.05%.

* Large variances may occur due to small sample sizes.

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Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)
(2008)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	2007/2008 Percent Change	Number Of Visitors To California	2007/2008 Percent Change*	CA Share Of Visitors From This Country
SOUTH AMERICA	2,555,599	12.4%	254,000	1.6%	9.9%
Argentina	318,144	19.2%	34,000	13.3%	10.6%
Brazil	769,232	20.3%	67,000	8.1%	8.7%
Chile	130,813	6.2%	16,000	23.1%	12.6%
Colombia	419,268	7.6%	31,000	-3.1%	7.5%
Ecuador	152,112	-2.1%	19,000	-64.8%	12.7%
Peru	162,883	9.3%	12,000	--	7.3%
Venezuela	507,153	10.6%	26,000	-29.7%	5.1%
Other South America	95,994	4.9%	49,000	390.0%	51.0%
CENTRAL AMERICA (Excl. Mexico)	775,590	-1.4%	145,000	-20.8%	18.6%
Costa Rica	165,257	3.0%	16,000	-33.3%	9.4%
Guatemala	188,177	-6.5%	28,000	-60.6%	14.8%
Honduras	116,902	5.3%	--	--	--
Panama	102,832	17.8%	5,000	-70.6%	4.5%
Other Central America	202,422	-10.5%	96,000	39.1%	47.4%
AFRICA	315,235	13.5%	44,000	15.8%	13.9%
South Africa, Rep. of	93,692	0.0%	16,000	-30.4%	17.5%
Other Africa	221,543	20.4%	28,000	86.7%	12.6%
OCEANIA	851,619	2.1%	439,000	1.2%	51.5%
Australia	689,927	3.0%	341,000	2.4%	49.4%
New Zealand	145,325	-1.6%	90,000	-4.3%	62.1%
Other Oceania	16,367	-0.5%	8,000	14.3%	48.9%

Note: "--" Represents an estimate of less than 500 visitors or a response of less than 0.05%.

* Large variances may occur due to small sample sizes.

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Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)
(2008)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	2007/2008 Percent Change	Number Of Visitors To California	2007/2008 Percent Change*	CA Share Of Visitors From This Country
FAR EAST	6,178,602	-3.1%	1,907,000	-2.9%	30.9%
Hong Kong	139,359	-2.1%	81,000	-3.6%	58.0%
India	598,971	5.6%	179,000	1.7%	29.9%
Indonesia	49,348	-8.3%	28,000	-20.0%	56.7%
Japan	3,249,578	-8.0%	629,000	-6.8%	19.4%
Korea, South	759,394	-5.8%	300,000	-9.4%	39.5%
People's Republic of China	492,958	24.0%	273,000	20.3%	55.5%
Philippines	179,820	4.7%	108,000	1.9%	59.9%
Republic of China	294,893	-5.2%	189,000	-6.0%	64.2%
Singapore	141,474	4.6%	77,000	2.7%	54.1%
Thailand	76,820	-0.2%	40,000	17.6%	51.6%
MIDDLE EAST	680,974	9.9%	131,000	15.9%	19.2%
Egypt	34,855	14.5%	4,000	33.3%	10.5%
Israel	332,257	6.1%	75,000	15.4%	22.7%
Saudi Arabia	48,590	24.8%	13,000	116.7%	26.1%
Turkey	107,572	12.6%	17,000	54.5%	15.4%
Other Middle East	157,700	11.2%	22,000	-21.4%	14.0%
TOTAL OVERSEAS VISITORS	25,341,451	6.1%	5,501,000	6.1%	21.7%
(Number of Respondents)	(35,909)		(7,780)		
Mexico (Air Arrivals Only)	1,708,320	-9.1%	378,000	-11.7%	22.1%

Note: "--" Represents an estimate of less than 500 visitors or a response of less than 0.05%.

Countries and World Region visitor volumes are independently estimated and may not sum to total visitors.

* Large variances may occur due to small sample sizes.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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**Table 2
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
SHARE OF TOTAL U.S. MARKET BY COUNTRY
AND VISITOR VOLUME ESTIMATE
(1996 - 2008)**

California's Share of Overseas & Mexican (Air) Visitors to the U.S.

Share	All Overseas	All Europe	Germany	United Kingdom	France	Italy	Netherlands	Ireland	Other Europe	Mexico (air)
1996	26.5%	26.6%	28.6%	21.2%	29.8%	30.2%	39.8%	21.4%	37.7%	25.3%
1997	26.6%	26.0%	26.7%	21.9%	29.5%	33.0%	27.1%	35.1%	36.0%	23.3%
1998	25.2%	24.8%	26.5%	21.2%	34.3%	31.7%	27.4%	22.8%	30.9%	26.8%
1999	25.5%	24.1%	26.4%	19.2%	33.6%	30.3%	29.3%	25.2%	32.3%	22.0%
2000	24.5%	21.0%	22.1%	16.3%	30.4%	27.2%	25.1%	32.3%	30.2%	26.0%
2001	22.2%	18.2%	20.6%	15.4%	24.5%	24.9%	19.6%	15.3%	24.1%	30.6%
2002	21.2%	19.2%	19.8%	17.3%	25.9%	22.8%	22.1%	21.8%	26.1%	27.3%
2003	22.1%	20.3%	20.2%	17.6%	28.5%	18.3%	25.2%	23.9%	30.7%	32.3%
2004	20.7%	18.0%	20.8%	16.1%	27.7%	24.5%	27.0%	11.1%	21.7%	27.4%
2005	22.1%	20.0%	21.8%	17.9%	29.7%	19.5%	25.2%	26.2%	26.5%	29.7%
2006	21.3%	18.1%	17.4%	18.0%	23.5%	19.6%	21.7%	18.2%	23.1%	27.2%
2007	21.7%	18.1%	21.1%	17.0%	23.8%	19.6%	22.7%	13.2%	22.4%	22.8%
2008	21.7%	19.0%	22.1%	17.9%	24.2%	19.4%	25.1%	14.5%	23.5%	22.1%

Estimated Volume of Visitors to California

1996	6,004,000	2,588,000	571,000	688,000	294,000	159,000	175,000	44,000	876,000	276,000
1997	6,436,000	2,701,000	532,000	815,000	289,000	191,000	128,000	76,000	874,000	304,000
1998	5,972,000	2,647,000	504,000	843,000	348,000	194,000	134,000	53,000	758,000	381,000
1999	6,239,000	2,709,000	524,000	816,000	356,000	190,000	154,000	62,000	823,000	328,000
2000	6,364,000	2,435,000	395,000	767,000	330,000	167,000	139,000	92,000	776,000	452,000
2001	4,847,000	1,728,000	271,000	631,000	215,000	118,000	81,000	42,000	493,000	463,000
2002	4,053,000	1,652,000	236,000	660,000	190,000	93,000	85,000	57,000	473,000	392,000
2003	3,984,000	1,754,000	238,000	693,000	196,000	75,000	94,000	61,000	552,000	439,000
2004	4,207,000	1,743,000	275,000	693,000	215,000	115,000	115,000	38,000	445,000	409,000
2005	4,791,000	2,063,000	309,000	778,000	261,000	106,000	113,000	100,000	609,000	496,000
2006	4,615,000	1,835,000	241,000	752,000	186,000	104,000	97,000	75,000	552,000	466,000
2007	5,185,000	2,065,000	322,000	765,000	237,000	124,000	115,000	65,000	617,000	428,000
2008	5,501,000	2,431,000	393,000	818,000	301,000	151,000	153,000	77,000	768,000	378,000

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Table 2 - (Continued)
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
SHARE OF TOTAL U.S. MARKET BY COUNTRY AND VISITOR VOLUME ESTIMATE
(1996 - 2008)

California's Share of Overseas Visitors to the U.S. From Asia, Australia, and South America

Share	Asia	Japan	South Korea	Hong Kong	Taiwan	India	China	Other Far East	Australia	South America
1996	31.3%	22.5%	32.9%	58.0%	64.8%	45.8%	N/A	80.6%	59.1%	13.7%
1997	32.1%	23.4%	39.0%	60.0%	65.3%	35.7%	N/A	77.3%	57.2%	15.1%
1998	31.6%	23.0%	52.0%	54.5%	66.2%	42.2%	N/A	77.4%	58.5%	15.1%
1999	31.9%	22.4%	61.5%	58.7%	60.0%	38.1%	N/A	64.6%	58.6%	13.2%
2000	33.2%	21.8%	63.3%	62.1%	59.6%	40.2%	59.6%	50.7%	60.7%	11.6%
2001	32.5%	20.8%	46.3%	60.8%	65.0%	44.0%	67.9%	52.1%	52.1%	11.5%
2002	29.1%	18.0%	44.7%	54.9%	63.9%	34.0%	53.0%	48.9%	49.0%	10.2%
2003	30.5%	18.6%	49.0%	56.3%	63.3%	40.0%	44.9%	54.9%	49.4%	9.7%
2004	27.7%	16.8%	43.5%	46.3%	59.6%	34.7%	49.8%	52.9%	49.8%	11.0%
2005	28.3%	18.6%	35.8%	59.8%	59.8%	28.4%	54.2%	48.9%	53.8%	8.8%
2006	29.1%	17.6%	41.1%	48.0%	59.2%	30.7%	61.6%	48.0%	47.4%	7.9%
2007	30.8%	19.1%	41.1%	59.3%	64.5%	31.0%	57.2%	43.4%	49.8%	11.0%
2008	30.9%	19.4%	39.5%	58.0%	64.2%	29.9%	55.5%	39.8%	49.4%	9.9%

Estimated Volume of Visitors to California

Estimates	Asia	Japan	South Korea	Hong Kong	Taiwan	India	China	Other Far East	Australia	South America
1996	2,348,000	1,166,000	247,000	141,000	269,000	66,000	N/A	459,000	274,000	337,000
1997	2,490,000	1,256,000	291,000	133,000	289,000	62,000	N/A	459,000	286,000	427,000
1998	2,125,000	1,124,000	189,000	116,000	256,000	89,000	N/A	351,000	270,000	447,000
1999	2,212,000	1,081,000	307,000	113,000	272,000	87,000	N/A	352,000	283,000	361,000
2000	2,508,000	1,103,000	419,000	126,000	273,000	110,000	149,000	328,000	328,000	341,000
2001	2,053,000	849,000	286,000	104,000	232,000	119,000	158,000	305,000	222,000	291,000
2002	1,656,000	653,000	285,000	74,000	184,000	87,000	120,000	253,000	199,000	185,000
2003	1,526,000	590,000	303,000	64,000	151,000	109,000	71,000	238,000	200,000	148,000
2004	1,607,000	630,000	273,000	57,000	177,000	107,000	101,000	262,000	259,000	181,000
2005	1,754,000	722,000	252,000	81,000	191,000	98,000	146,000	264,000	313,000	160,000
2006	1,790,000	646,000	311,000	66,000	178,000	125,000	197,000	267,000	286,000	152,000
2007	1,964,000	675,000	331,000	84,000	201,000	176,000	227,000	270,000	333,000	250,000
2008	1,907,000	629,000	300,000	81,000	189,000	179,000	273,000	256,000	341,000	254,000

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INTRODUCTION

This report on overseas visitors to California is based on data compiled from the 2008 Office of Travel & Tourism Industries (OTTI) "Survey of International Air Travelers." The survey is conducted by CIC Research, Inc. in cooperation with over 80 major airlines on a sample of their international flights departing from U.S. airports. The survey information is collected from passengers through questionnaires covering traveler demographics, trip activities, places visited and travel expenditures. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used by the public and private sectors to guide strategic planning and marketing to international air travelers².

Approximately 7,780 survey respondents reported a California visit in 2008. This is a very robust sample size, providing a unique opportunity to evaluate the characteristics of the international visitor market. However, since airline participation is voluntary and varies from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data may not fully represent the market's international travel to California.

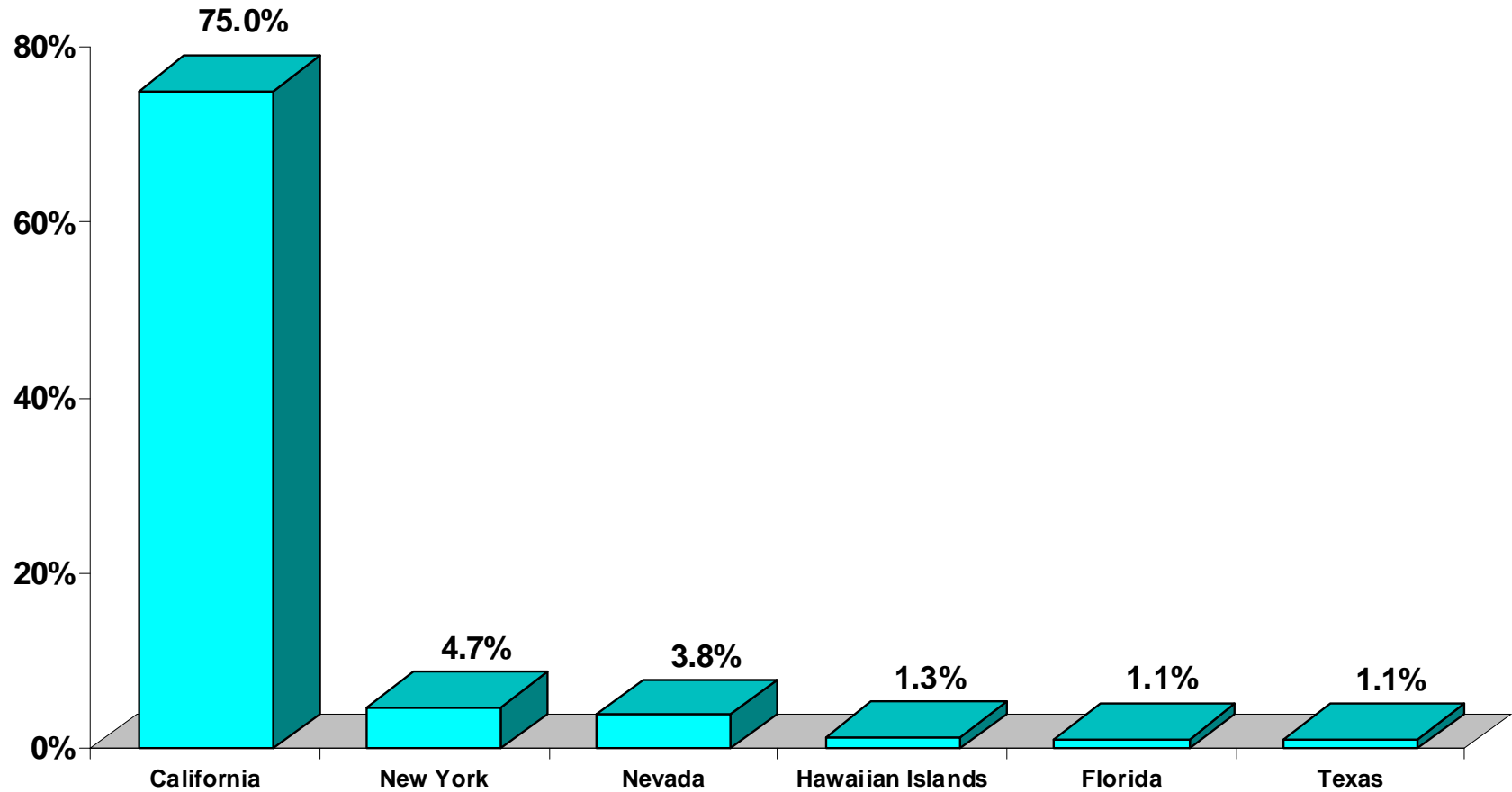
² The international visitor volume estimates appearing in this report were based on the U.S. Department of Commerce, "Survey of International Air Travelers" and then were adjusted by the CTTC to reflect additional market information regarding travel to California.

With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the U.S. Department of Homeland Security. Passengers on most charter flights and passengers traveling by air between the U.S. and Canada are excluded. Travelers to the U.S. from Mexico arriving on an international flight have been included in the 2008 report. However, most travelers from Mexico to California arrive in the U.S. through a land port of entry. A more detailed explanation of the survey methodology appears in Appendix A and a copy of the survey questionnaire in Appendix B.



**OVERSEAS AND MEXICAN (AIR) VISITORS TO CALIFORNIA
(2008)**

Figure 2
MAIN STATE DESTINATION
OVERSEAS VISITORS TO CALIFORNIA
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 3

**MAIN DESTINATION BY STATE
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

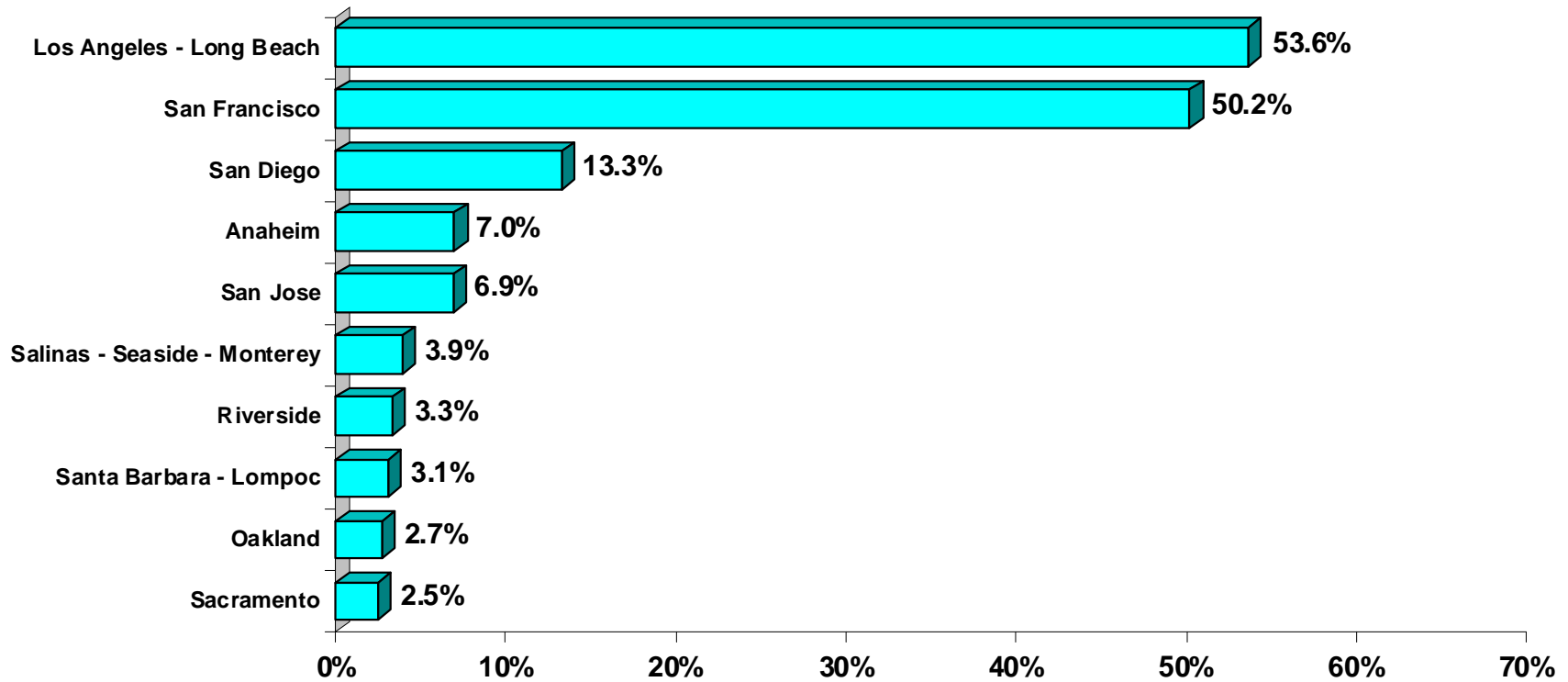
- Three in four (75%) overseas visitors to California in 2008 indicated that California was their main destination on their U.S. trip.
- Of all overseas visitors to California, French (88%), followed by South Korean (87%), Japanese (83%), and Taiwanese visitors (82%) reported the highest proportion with California as their main state of destination in the U.S.

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (5,783)	818,000 (822)	393,000 (238)	301,000 (190)	151,000 (180)	341,000 (354)	273,000 (385)	179,000 (361)	629,000 (1,235)	300,000 (483)	189,000 (386)	378,000 (316)
California	75.0%	74.3%	78.0%	87.8%	71.9%	43.0%	68.7%	73.5%	82.6%	87.0%	82.2%	79.2%
New York	4.7	2.1	3.8	1.9	10.2	20.3	8.8	3.2	1.9	1.1	1.5	0.1
Nevada	3.8	4.0	2.3	4.7	0.9	3.4	3.8	2.0	2.5	1.3	1.0	0.3
Hawaiian Islands	1.3	5.0	1.3	-	-	0.5	1.3	-	0.7	-	0.2	2.0
Florida	1.1	1.0	1.0	0.4	0.4	3.5	2.2	0.9	0.4	0.4	1.5	0.2
Texas	1.1	0.9	2.5	0.2	-	0.2	4.1	2.1	1.0	0.2	1.9	-

*Visitors may report only one destination -- States with less than 1% response were not listed.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 3
TOP TEN MSA DESTINATIONS
OVERSEAS VISITORS TO CALIFORNIA
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 4

**CALIFORNIA MSAs VISITED
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA*
(2008)**

- The most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California in 2008 were Los Angeles – Long Beach (54%) (up from 52% in 2007), San Francisco (50%) (up from 45% in 2007), San Diego (13%), San Jose (7%), and Anaheim – Santa Ana (7%).

METROPOLITAN STATISTICAL AREA*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,619)	818,000 (978)	393,000 (327)	301,000 (246)	151,000 (258)	341,000 (537)	273,000 (672)	179,000 (466)	629,000 (1,500)	300,000 (635)	189,000 (492)	378,000 (340)
Los Angeles-Long Beach MSA (Los Angeles County)	2,839,000 53.6%	358,000 44.0%	178,000 46.6%	187,000 61.1%	82,000 58.4%	234,000 66.4%	158,000 66.0%	69,000 40.2%	286,000 50.6%	165,000 58.8%	111,000 57.4%	226,000 53.9%
Universal Studios	26,000 0.5%	11,000 1.3%	1,000 0.2%	- -	- -	1,000 0.4%	- -	1,000 0.7%	1,000 0.2%	2,000 0.6%	2,000 0.8%	16,000 3.8%
Hollywood	37,000 0.7%	7,000 0.9%	5,000 1.4%	1,000 0.4%	- -	8,000 2.3%	- -	- -	8,000 1.5%	<1,000 0.1%	- -	- -
San Francisco MSA (San Francisco-Marin-San Mateo Counties)	2,659,000 50.2%	473,000 58.2%	214,000 56.2%	183,000 59.8%	88,000 63.2%	169,000 47.8%	106,000 44.1%	87,000 50.6%	194,000 34.3%	120,000 42.7%	73,000 38.0%	92,000 21.9%
San Diego MSA (San Diego County)	704,000 13.3%	85,000 10.4%	59,000 15.5%	43,000 14.1%	30,000 21.4%	35,000 10.0%	17,000 7.1%	16,000 9.5%	73,000 13.0%	33,000 11.9%	15,000 7.9%	59,000 14.0%
Sea World	5,000 0.1%	- -	- -	- -	- -	- -	- -	1,000 0.7%	1,000 0.1%	- -	<1,000 0.2%	4,000 0.9%
Anaheim-Santa Ana MSA (Orange County)	371,000 7.0%	46,000 5.6%	21,000 5.5%	24,000 7.9%	4,000 2.5%	51,000 14.4%	7,000 2.8%	17,000 9.8%	53,000 9.3%	24,000 8.5%	7,000 3.6%	48,000 11.5%

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Table 4 (continued)
COUNTRY OF RESIDENCE OF VISITORS

METROPOLITAN STATISTICAL AREA*	TOTAL OVERSEAS	U.K.	GERMANY (2006-2007)	FRANCE (2006-2007)	ITALY (2006-2007)	AUSTRALIA	CHINA w/o HK	INDIA	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR)
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	5,501,000 (7,619)	818,000 (978)	393,000 (327)	301,000 (246)	151,000 (258)	341,000 (537)	273,000 (672)	179,000 (466)	629,000 (1,500)	300,000 (635)	189,000 (492)	378,000 (340)
Disneyland	42,000 0.8%	11,000 1.4%	2,000 0.5%	1,000 0.3%	- -	3,000 0.9%	1,000 0.4%	3,000 1.5%	7,000 1.3%	- -	1,000 0.4%	32,000 7.7%
San Jose MSA (Santa Clara County)	365,000 6.9%	32,000 3.9%	31,000 8.2%	16,000 5.1%	5,000 3.3%	8,000 2.4%	18,000 7.7%	31,000 18.4%	67,000 11.8%	30,000 10.8%	24,000 12.4%	14,000 3.3%
Salinas-Seaside-Monterey MSA (Monterey County)	207,000 3.9%	55,000 6.8%	25,000 6.6%	9,000 2.8%	10,000 7.2%	9,000 2.6%	2,000 1.0%	2,000 0.9%	6,000 1.0%	4,000 1.4%	3,000 1.6%	4,000 0.9%
Riverside-San Bernardino MSA (Riverside-San Bernardino Counties)	175,000 3.3%	51,000 6.3%	19,000 5.1%	6,000 2.0%	7,000 5.0%	4,000 1.1%	1,000 0.6%	1,000 0.7%	8,000 1.5%	9,000 3.3%	3,000 1.6%	7,000 1.7%
Santa Barbara-Lompoc MSA (Santa Barbara County)	164,000 3.1%	31,000 3.8%	20,000 5.2%	29,000 9.6%	6,000 4.3%	5,000 1.5%	<1,000 0.2%	1,000 0.7%	7,000 1.2%	3,000 1.0%	1,000 0.7%	<1,000 0.1%
Oakland MSA (Alameda-Contra Costa Counties)	143,000 2.7%	42,000 5.2%	8,000 2.1%	5,000 1.6%	6,000 4.5%	2,000 0.7%	6,000 2.5%	10,000 5.9%	8,000 1.4%	5,000 1.8%	11,000 5.8%	13,000 3.2%
Sacramento MSA (El Dorado-Placer-Sacramento-Yolo Counties)	132,000 2.5%	22,000 2.7%	14,000 3.7%	3,000 0.9%	<1,000 0.3%	11,000 3.1%	- -	10,000 5.8%	11,000 2.0%	4,000 1.6%	3,000 1.5%	7,000 1.7%

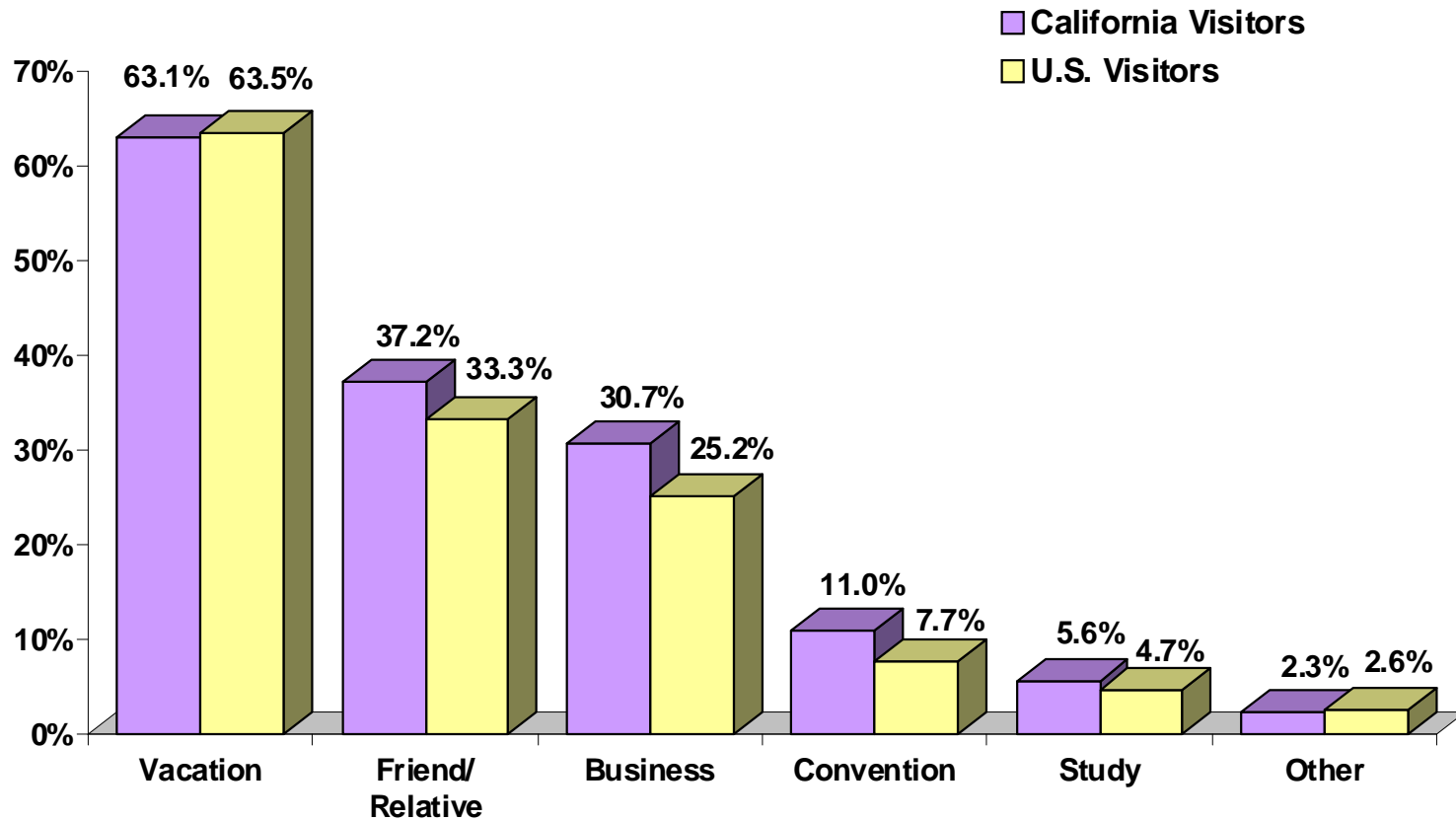
*Visitors may report multiple destinations -- percentages are read down the column. Counties with less than a 2% share of the California market were not listed.

Volume estimates by MSA were adjusted for non-response and will differ slightly from the estimates reported by ITA.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 4
PURPOSE OF U.S. TRIP
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 5

**PURPOSE OF TRIP
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

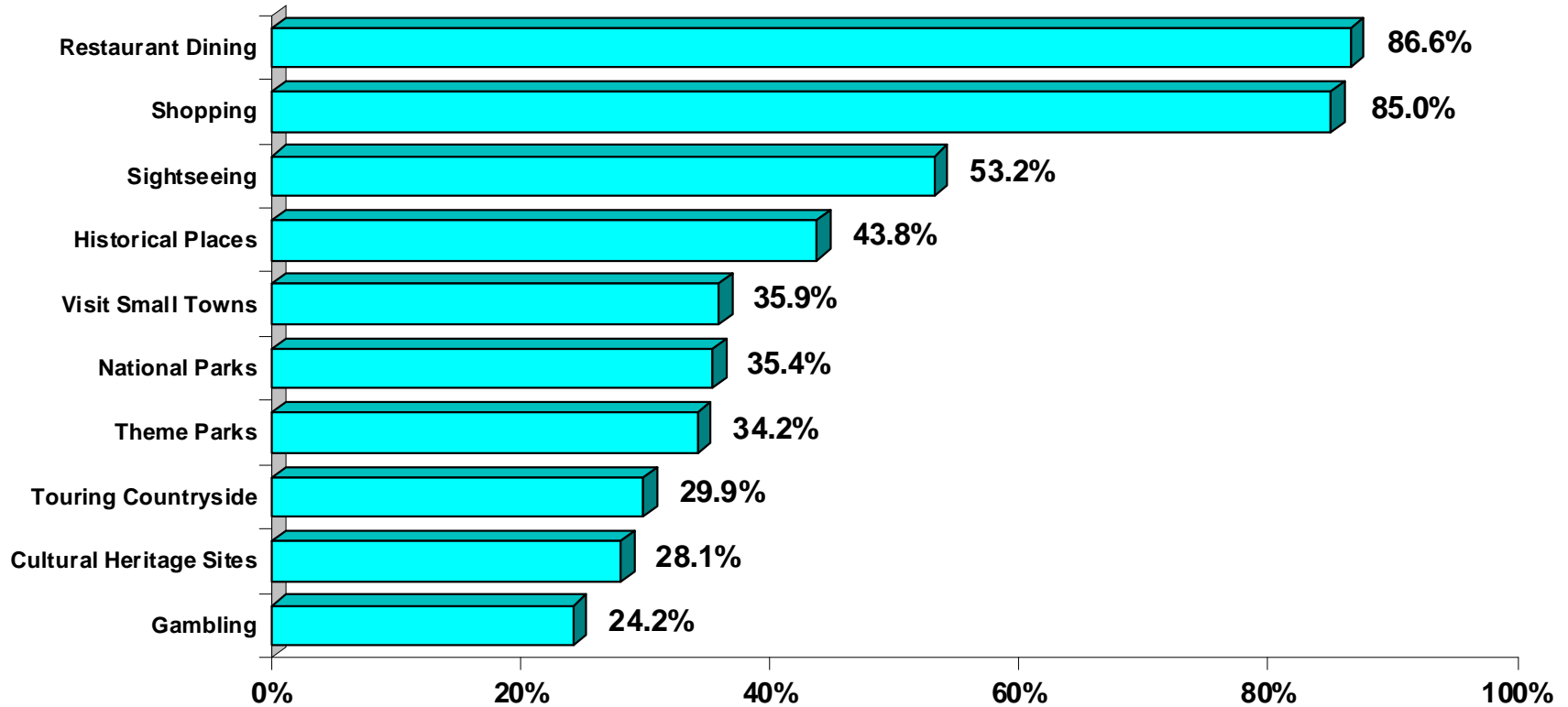
- Almost two-thirds (63%) of the overseas visitors to California reported visiting for vacation/holiday purposes, while 37 percent were visiting friends/relatives and 31% were on business. Visitors to California attending a convention accounted for 11%. Visitors were allowed to list more than one purpose of their trip.
- Visitors from Australia (77%), followed by Italy (73%), and the U.K. (73%) indicated high proportions of vacationing during their U.S. trip.
- When compared with visitors from other countries, visitors to California from China (59%), and India (59%) reported a high proportion of visiting for business purposes, while visitors from Australia (17%) reported the lowest proportion visiting for this reason.

PURPOSE OF TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL		GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA		INDIA (2007-2008)	SOUTH		MEXICO (AIR) (2007-2008)
	OVERSEAS	U.K.					w/o HK (2007-2008)	JAPAN		KOREA	TAIWAN	
ESTIMATED TRAVELERS	5,501,000	818,000	393,000	301,000	151,000	341,000	273,000	179,000	629,000	300,000	189,000	378,000
(Number of Respondents)	(7,745)	(993)	(332)	(251)	(265)	(551)	(683)	(480)	(1,500)	(640)	(495)	(343)
Vacation/Holidays	63.1%	72.5%	70.4%	58.5%	73.4%	76.7%	43.9%	28.9%	49.7%	55.0%	46.8%	49.7%
Visit Friends/Relatives	37.2	32.6	36.8	31.2	19.9	42.8	25.5	44.3	28.5	39.5	52.4	46.1
Business/Professional	30.7	23.7	23.6	29.3	21.6	17.0	59.1	59.3	37.2	35.2	40.7	22.2
Attend A Convention	11.0	7.0	5.1	9.1	9.2	7.4	18.5	12.3	12.9	13.1	13.6	9.5
Study/Teaching	5.6	2.3	1.6	3.9	8.7	2.0	9.7	2.3	7.3	14.3	8.9	3.7
Other	2.3	2.1	2.8	0.3	4.1	1.9	2.7	3.2	1.8	3.4	3.9	10.9

*Column percentages may total more than 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 5
LEISURE RECREATION ACTIVITIES
OVERSEAS VISITORS TO CALIFORNIA
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 6
**LEISURE-RECREATION ACTIVITIES
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Dining in restaurants (87%), shopping (85%), followed by sightseeing (53%) were the most common leisure and recreation activities of overseas visitors to California.
- Visitors from the U.K. (96%) followed by Australia (93%) had the highest proportion of respondents who mentioned dining in restaurants, while visitors from China (93%), Australia (92%), and Taiwan (91%), had the highest proportion of respondents who mentioned shopping as one their favorite activities. Australia had the highest proportion of respondents who mentioned sightseeing in cities (70%).

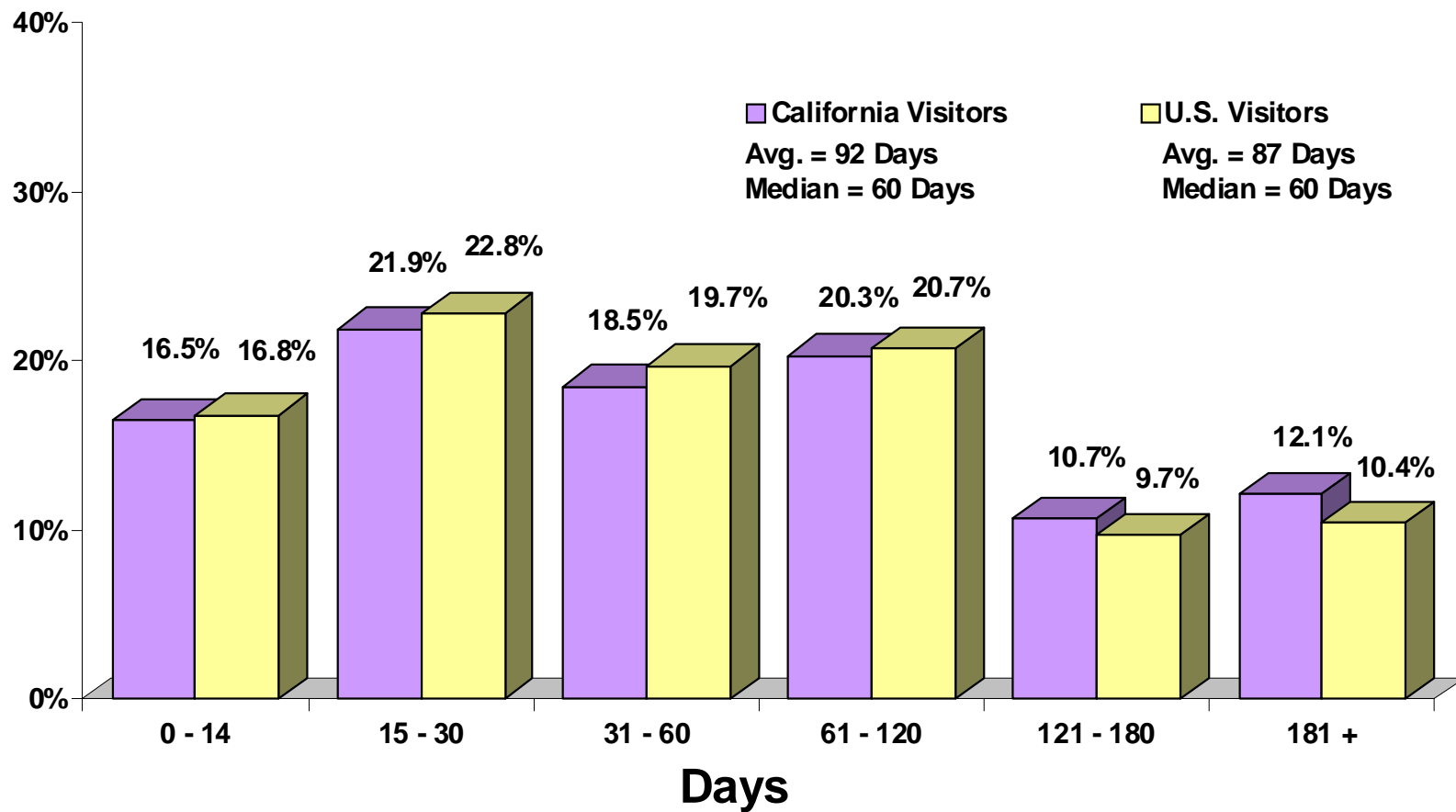
LEISURE/RECREATION ACTIVITIES*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007-2008)	INDIA (2007-2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007-2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,140)	818,000 (921)	393,000 (317)	301,000 (224)	151,000 (233)	341,000 (520)	273,000 (602)	179,000 (430)	629,000 (1,370)	300,000 (602)	189,000 (466)	378,000 (299)
Dining in Restaurants	86.6%	95.8%	84.8%	86.2%	79.2%	93.2%	82.7%	77.8%	88.3%	60.4%	81.0%	71.1%
Shopping	85.0	86.9	84.7	72.4	82.0	92.1	93.0	88.4	81.2	80.4	90.6	78.5
Sightseeing in Cities	53.2	58.4	46.6	45.6	54.9	70.4	58.6	50.9	45.9	43.9	49.6	27.7
Visit Historical Places	43.8	52.4	49.9	49.5	58.5	57.3	50.0	32.4	11.3	15.2	32.4	34.5
Visit Small Towns	35.9	44.4	39.7	36.7	51.3	39.7	18.0	15.1	28.8	17.6	23.0	32.2
Visit National Parks	35.4	44.3	48.2	43.8	50.5	33.6	30.1	21.2	13.0	35.2	20.3	14.5
Amusement/Theme Parks	34.2	26.1	32.4	29.6	39.8	45.8	35.7	38.8	24.8	36.5	33.2	40.3
Touring Countryside	29.9	40.0	50.1	28.8	28.7	41.8	15.9	22.0	12.1	21.0	16.8	15.1
Cultural Heritage Sites	28.1	30.8	48.2	34.1	30.7	32.4	29.5	15.2	7.4	31.3	17.7	13.1
Casinos/Gambling	24.2	22.9	22.5	29.4	17.9	38.7	32.1	21.3	10.2	22.8	22.1	6.6
Art Gallery/Museum	22.9	21.1	24.5	30.5	36.8	37.0	22.4	19.2	8.7	15.1	16.9	12.3
Guided Tours	22.0	32.1	18.7	16.9	15.3	41.0	17.4	16.6	11.1	14.2	22.0	10.7
Water Sports/Sunbathing	17.7	27.2	31.2	15.1	22.1	22.0	10.4	6.5	6.3	4.5	7.9	7.3
Concert/Play/Musical	17.4	19.5	18.1	12.3	6.8	32.6	8.8	10.2	9.0	11.9	10.7	10.5
Nightclubs/Dancing	15.7	18.5	18.2	16.8	12.1	21.8	6.6	14.3	6.1	4.3	4.7	12.0
Camping/Hiking	8.7	12.9	11.2	11.9	7.9	7.2	3.5	4.3	4.0	3.9	4.5	0.6
Attend Sports Event	8.2	6.9	9.3	5.3	6.8	23.1	3.6	4.3	5.8	3.7	6.8	5.8
Visit Am. Indian Comm.	8.2	10.8	12.8	16.0	19.5	9.1	5.0	9.6	1.5	2.9	4.7	1.1
Cruises	6.6	5.3	2.7	7.7	0.3	14.1	12.5	11.3	2.5	15.9	9.8	5.4
Golfing/Tennis	5.9	5.5	3.3	5.5	1.4	3.5	4.6	3.6	9.8	13.7	9.3	2.4
Ethnic Heritage Sites	5.4	8.7	3.7	6.4	7.8	6.4	4.4	5.1	1.4	3.5	5.5	2.3
Environ./Eco. Excursions	5.2	4.3	2.4	12.4	10.4	6.2	5.6	3.6	0.6	1.7	7.0	3.4
Snow Skiing	3.0	3.9	1.8	1.6	0.3	5.8	1.2	4.6	0.7	1.4	4.9	-
Hunting/Fishing	1.4	2.0	1.0	0.1	1.0	2.3	1.0	0.7	0.7	1.9	1.4	1.3
Ranch Vacations	1.3	2.2	0.9	0.8	2.8	0.5	1.7	1.1	0.6	2.1	3.7	0.8

*Multiple response. Only responses 1.0 percent or greater are detailed.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 6
ADVANCE TRIP DECISION
 OVERSEAS VISITORS TO CALIFORNIA / U.S.
 (2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 7

**ADVANCE TRIP DECISION
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

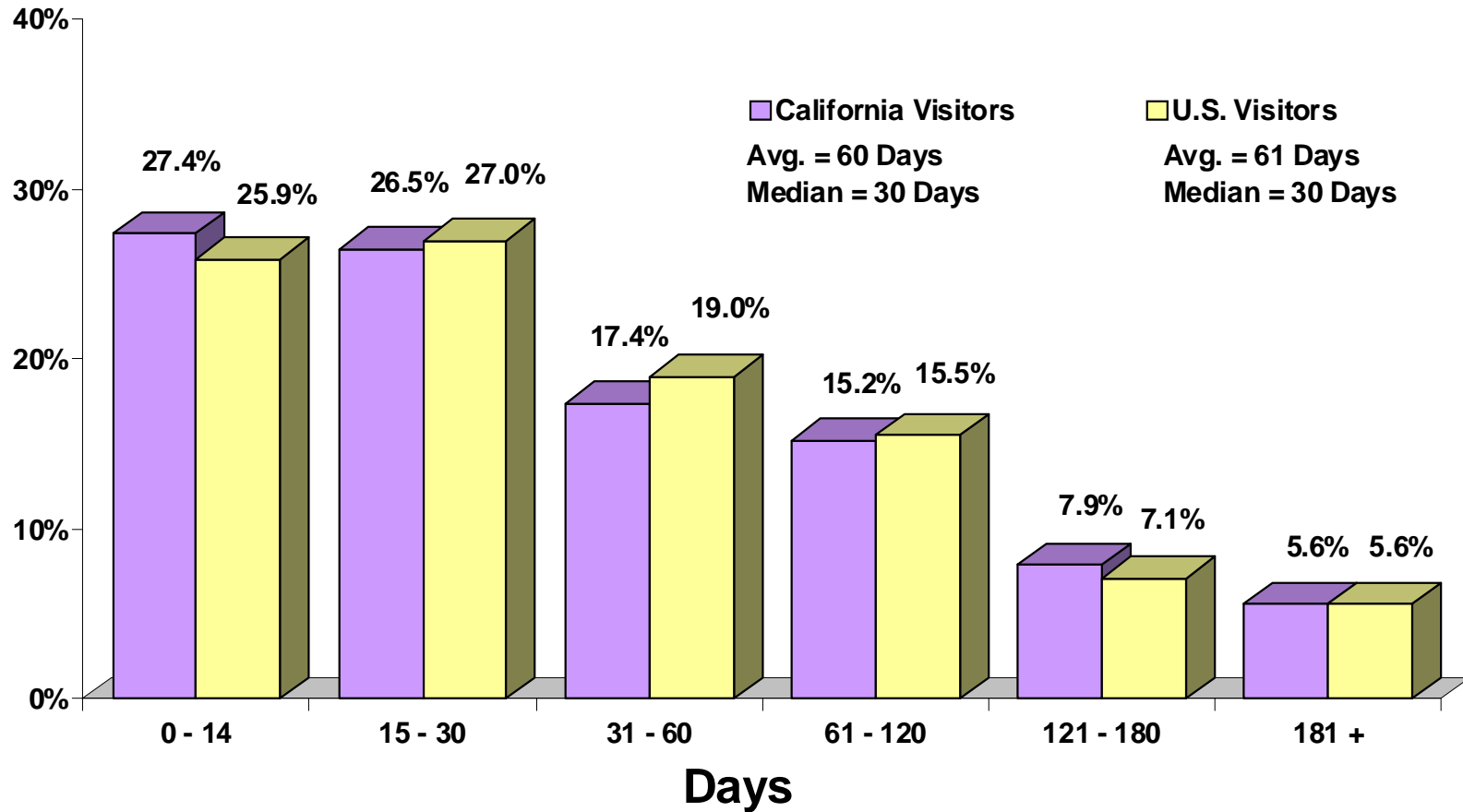
- The median time period for overseas visitors' decision to travel was 60 days before the actual trip. In 2007 this decision was made a median of 50 days prior to the trip, as compared with 60 days in 2006 and 2005.
- Respondents from Australia had the longest planning time frame with a median of 120 days, followed by respondents from Germany (95 days).

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS	5,501,000	818,000	393,000	301,000	151,000	341,000	273,000	179,000	629,000	300,000	189,000	378,000
(Number of Respondents)	(7,299)	(951)	(323)	(236)	(247)	(530)	(622)	(421)	(1,418)	(608)	(468)	(313)
14 Days or Less	16.5%	13.3%	7.0%	15.7%	9.5%	8.0%	16.4%	26.4%	21.0%	17.3%	27.1%	24.3%
15 - 30 Days	21.9	12.5	15.3	22.9	21.9	11.7	39.8	33.4	31.1	37.7	35.6	38.9
31 - 60 Days	18.5	20.1	16.8	12.4	19.0	14.3	21.7	19.2	22.2	22.7	19.0	15.5
61 - 120 Days	20.3	24.2	22.5	21.7	25.3	20.8	15.9	11.5	16.9	15.5	12.1	11.8
121 - 180 Days	10.7	10.8	15.5	13.2	14.0	17.4	3.7	8.5	5.2	4.3	4.7	4.8
181 or More Days	12.1	19.0	23.0	14.1	10.5	27.8	2.4	1.0	3.6	2.4	1.4	4.5
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	91.6	114.3	131.0	97.0	91.8	151.0	51.0	48.4	57.4	54.1	47.3	51.3
Median No. of Days	60.0	90.0	95.0	60.0	60.0	120.0	30.0	30.0	30.0	30.0	30.0	30.0

*Column percentages may not total 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 7
ADVANCE AIRLINE DECISION
 OVERSEAS VISITORS TO CALIFORNIA / U.S.
 (2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 8

**ADVANCE TICKET PURCHASE
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- An overseas visitor committed to an airline ticket purchase a median of 30 days prior to the actual trip. Almost six percent of travelers booked their airline reservations six months or more in advance of their trip.
- Visitors from Australia, the United Kingdom, and Germany booked their airline tickets a median of 2 months or more in advance. By contrast, visitors from China and Mexico (air) booked airline tickets a median of only 15 days in advance of their U.S. trip.

COUNTRY OF RESIDENCE OF VISITORS

ADVANCE AIRLINE RESERVATIONS*	TOTAL		FRANCE				ITALY		CHINA			MEXICO	
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	(AIR) (2007- 2008)	
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,066)	818,000 (930)	393,000 (320)	301,000 (227)	151,000 (241)	341,000 (517)	273,000 (602)	179,000 (408)	629,000 (1,337)	300,000 (582)	189,000 (453)	378,000 (303)	
14 Days or less	27.4%	21.1%	14.9%	24.5%	16.1%	13.5%	44.7%	40.7%	32.8%	33.2%	39.9%	35.5%	
15 - 30 Days	26.5	17.0	20.5	24.5	30.1	16.0	41.2	36.0	35.4	41.9	37.4	45.9	
31 - 60 Days	17.4	21.1	17.5	18.1	17.4	16.5	10.9	15.1	19.2	16.0	15.2	10.0	
61 - 120 Days	15.2	18.2	26.6	15.3	25.5	26.0	1.5	5.5	8.8	2.2	6.6	6.1	
121 - 180 Days	7.9	10.7	11.7	10.2	9.6	16.0	0.8	2.6	2.4	0.9	0.5	1.9	
181 or More Days	5.6	12.0	8.8	7.5	1.4	12.0	0.8	0.2	1.3	0.4	0.6	0.5	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Average No. of Days	59.8	84.0	82.1	65.4	61.0	95.3	23.9	29.1	37.7	31.1	29.8	27.7	
Median No. of Days	30.0	60.0	60.0	40.0	40.0	85.0	15.0	18.0	30.0	20.0	20.0	15.0	

*Column percentages may not total 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 9

**MEANS OF BOOKING AIR TRIP AND LODGING
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Almost half of overseas visitors to California used a travel agent to make airline reservations (48%). In comparison, almost one-quarter (24%) of visitors used a travel agent to make lodging arrangements. Visitors from Australia, India and Taiwan reported the highest use of travel agents in booking their air trip (71%, 64% and 63% respectively). Visitors from Italy, Australia, China, and Germany reported the highest use of travel agents in booking their lodging (35%, 33%, 33% and 30% respectively).
- Visitors from the U.K. and France reported the highest use of a personal computer in booking their air trip (33% and 31% respectively). Visitors from Mexico (air) reported the highest proportion who booked with the airline directly (17%), and visitors from India reported the highest use of a company travel dept. (28%).

MEANS OF BOOKING AIR TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL	FRANCE			ITALY			CHINA w/o HK	INDIA	SOUTH		
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	(2007-2008)	(2007-2008)	JAPAN	KOREA	TAIWAN	(2007-2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,493)	818,000 (964)	393,000 (327)	301,000 (240)	151,000 (261)	341,000 (531)	273,000 (672)	179,000 (469)	629,000 (1,470)	300,000 (642)	189,000 (476)	378,000 (325)
Travel Agent	48.4%	32.0%	46.5%	31.1%	54.2%	71.1%	57.6%	63.7%	50.6%	56.5%	62.9%	46.5%
Personal Computer	21.5	32.9	23.2	30.8	25.7	11.7	4.5	2.8	15.8	18.2	9.0	25.8
Airline Directly	11.7	13.8	13.9	9.6	2.1	12.3	9.6	4.3	10.9	9.9	8.0	17.4
Company Travel Dept.	11.2	10.7	9.8	16.5	6.6	2.1	16.8	27.7	15.8	12.4	11.7	7.7
Tour Operator	3.7	6.9	3.0	1.8	9.0	1.5	4.4	0.7	4.7	1.0	6.4	1.0
Travel Club	0.5	1.0	-	-	0.7	0.5	0.6	0.2	0.1	0.2	1.1	0.1
Don't Know/Other	2.9	2.6	3.7	10.3	1.7	0.8	6.6	0.6	2.2	1.8	1.0	1.5
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
MEANS OF BOOKING LODGING												
(Number of Respondents)	(7,525)	(975)	(324)	(241)	(255)	(539)	(672)	(468)	(1,440)	(629)	(490)	(325)
Yes, Booked by**	68.9%	71.8%	69.5%	57.3%	68.2%	67.3%	71.5%	54.7%	83.2%	76.1%	63.6%	46.4%
Travel Agent	24.0%	21.5%	29.8%	10.5%	34.6%	33.2%	32.6%	10.5%	25.3%	22.2%	28.4%	18.7%
Hotel/Motel Directly	14.3	20.3	16.6	12.4	6.8	16.5	2.6	6.4	21.6	3.7	4.3	6.5
Company Travel Dept.	10.9	11.1	9.9	10.6	4.3	3.1	14.4	26.0	14.6	15.1	10.6	5.4
Friend or Relative	5.2	2.8	2.8	2.7	2.9	3.2	4.2	3.9	7.9	10.3	8.6	1.1
Business Associate	4.5	2.2	2.5	6.7	2.1	1.9	4.9	2.0	8.9	8.1	4.3	1.9
Tour Operator	4.5	7.3	4.2	2.3	7.5	2.3	4.2	0.4	6.7	2.4	5.6	0.6
Airline Staff	0.8	0.8	0.6	-	0.4	0.6	1.5	0.4	0.3	0.9	3.3	2.5
Other	12.4	14.0	11.0	15.7	14.5	17.4	10.3	7.3	9.8	17.5	7.2	11.2
No	31.1%	28.2%	30.5%	42.7%	31.8%	32.7%	28.5%	45.3%	16.8%	23.9%	36.4%	53.6%

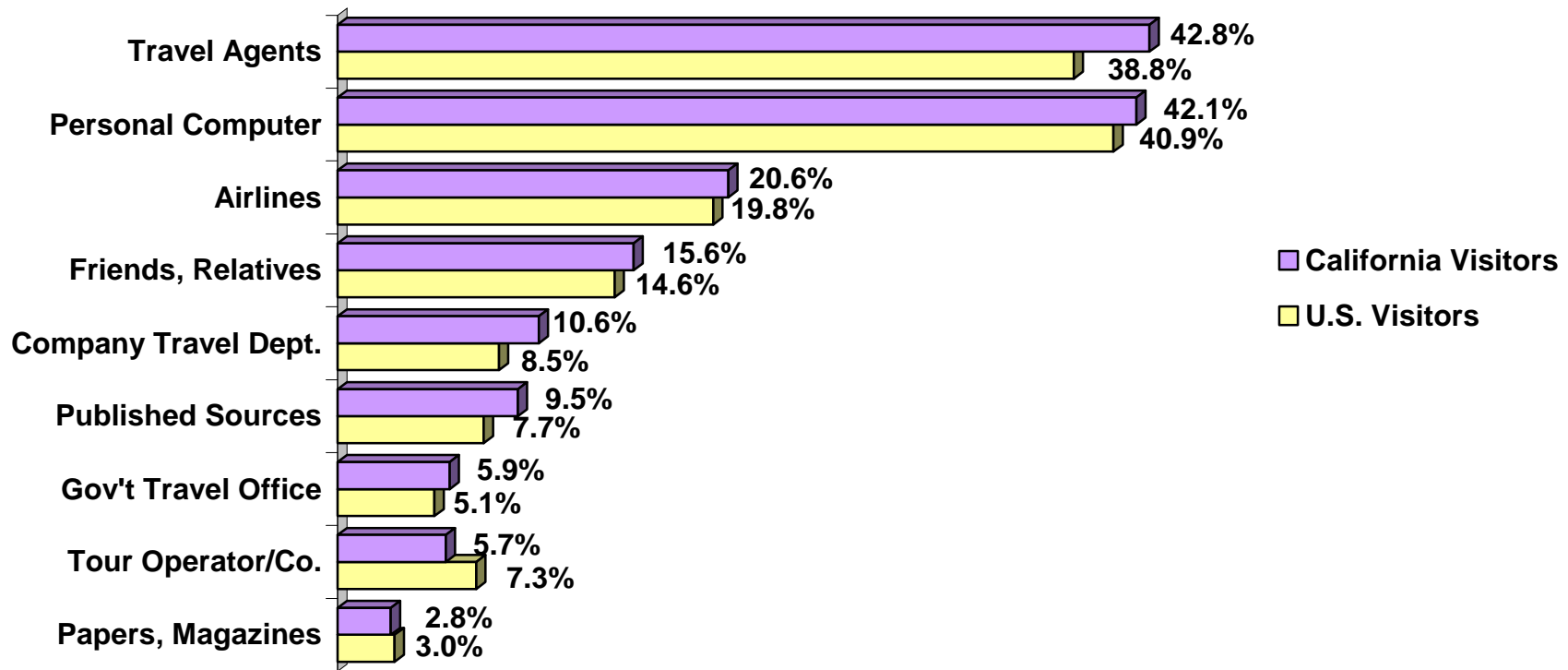
*Column percentages may not total to 100 percent due to rounding.

** Multiple Response. Percentages based on total number of respondents.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 8
TRAVEL INFORMATION SOURCES
 OVERSEAS VISITORS TO CALIFORNIA / U.S.
 (2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 10

**U.S. TRIP INFORMATION SOURCES
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Slightly lower than previous years, approximately four in ten overseas travelers to California (43%) used information from travel agencies to plan their trip (use of information from travel agencies was 48% in 2007). On the other hand, use of a personal computer (i.e., the Internet) was higher in 2008 (42%), than in 2007 (36%), 2006 (35%), or 2005 (35%). Travelers who called the airlines directly (21%), those who relied on friends/relatives (16%), and those who used the corporate travel department (11%) rounded out the top five information sources.
- Visitors from Australia (64%) followed by those from Taiwan (55%), Italy (54%), and India (52%) showed the highest use of travel agencies as information sources. Use of a personal computer was the second highest source of information for overseas travelers (42%). Travelers from the U. K. and Germany (49% each respectively) reported the highest computer usage.

COUNTRY OF RESIDENCE OF VISITORS

INFORMATION SOURCES*	TOTAL		FRANCE				CHINA		SOUTH			MEXICO
	OVERSEAS	U.K.	GERMANY	(2007-2008)	ITALY (2007-2008)	AUSTRALIA	w/o HK (2007-2008)	INDIA (2007-2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007-2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,641)	818,000 (983)	393,000 (329)	301,000 (249)	151,000 (263)	341,000 (546)	273,000 (660)	179,000 (472)	629,000 (1,480)	300,000 (639)	189,000 (493)	378,000 (335)
Travel Agency	42.8%	33.1%	32.8%	39.2%	53.7%	63.5%	39.9%	52.1%	44.0%	39.8%	55.2%	37.0%
Personal Computer	42.1	49.1	48.9	40.1	40.7	45.8	18.2	16.2	42.5	38.3	32.1	27.7
Airlines Directly	20.6	24.5	28.1	16.6	9.7	13.6	18.1	11.3	16.3	11.8	22.3	20.9
Friends/Relatives	15.6	12.5	14.8	13.4	13.3	19.8	12.6	14.9	15.7	18.0	17.3	17.1
Corporate Travel Dept.	10.6	10.1	9.9	5.8	6.1	3.1	18.8	26.2	17.6	12.8	12.6	4.8
Travel Guides	9.5	9.8	19.4	6.2	8.5	9.7	2.5	1.7	15.0	8.0	4.2	4.5
Government Sources	5.9	1.9	23.3	1.1	6.8	5.3	6.2	2.6	3.5	3.0	4.9	4.5
Tour Company	5.7	9.6	3.1	7.1	2.7	3.6	9.0	1.3	10.3	3.9	6.7	2.2
Newspapers/Magazines	2.8	3.1	6.1	0.7	2.2	4.4	2.7	1.0	3.1	4.1	2.4	0.2
In-flight Info. Systems	1.1	0.6	1.3	1.7	1.4	0.4	1.9	0.4	1.4	1.5	1.3	1.7
TV/Radio	0.9	0.6	1.9	0.8	0.5	1.4	1.7	0.3	0.3	1.7	0.7	-

*Column percentages may total more than 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 11

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Three-quarters (74%) of overseas visitors to California used an economy/tourist ticket, while 16% used a business class ticket. Italian travelers (85%) reported the highest use of economy/tourist tickets, and Taiwanese and Japanese travelers reported the highest use of executive/business class tickets (27% and 26% respectively).
- Eleven percent (11%) of overseas travelers to California traveled with an inclusive tour package, where airfare, lodging, ground transportation, or other items were prepaid prior to departure. Visitors from China (25%) and Italy (24%) took the greatest advantage of inclusive tour packages. On the other hand, the fewest visitors from India (4%) and Germany (6%) used tour packages.

TYPE OF AIRLINE TICKET*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,337)	818,000 (956)	393,000 (324)	301,000 (230)	151,000 (238)	341,000 (523)	273,000 (616)	179,000 (454)	629,000 (1,435)	300,000 (620)	189,000 (473)	378,000 (306)
Economy/Tourist/Coach	73.7%	72.9%	74.7%	82.5%	84.7%	76.3%	77.5%	80.6%	59.6%	80.9%	61.0%	79.7%
Executive/Business	16.4	19.0	14.1	11.3	10.0	12.2	11.7	16.5	25.5	11.7	26.5	9.4
Frequent Flyer Award	3.6	2.2	6.2	2.0	5.2	5.8	1.3	4.7	4.3	0.7	2.7	6.8
Frequent Flyer Upgrade	2.3	1.5	0.9	3.1	2.5	1.6	1.2	0.9	5.4	4.7	4.7	1.7
First Class	2.3	2.7	1.7	0.9	0.6	3.0	1.6	0.6	2.1	1.0	3.1	2.5
Don't Know	1.8	2.1	2.3	1.3	-	0.9	2.0	1.0	3.7	2.0	2.1	1.5
Discount/Group Fare	1.7	0.9	0.7	1.1	0.6	0.9	6.7	0.2	4.0	2.2	2.7	0.7
Non-Revenue	1.1	0.5	2.6	-	-	0.8	0.1	1.2	0.8	0.1	-	0.7
USE OF PREPAID PACKAGE												
(Number of Respondents)	(7,522)	(981)	(326)	(240)	(256)	(543)	(630)	(453)	(1,484)	(614)	(481)	(325)
YES**	11.4%	17.0%	6.2%	10.2%	23.7%	15.5%	24.7%	3.8%	9.4%	14.1%	11.0%	14.3%
Air/Lodging	7.6	12.0	4.6	5.7	15.6	9.6	15.2	2.1	7.6	10.2	9.2	10.3
Guided Tour	5.5	6.3	2.7	4.6	8.3	7.4	20.7	1.5	5.0	11.3	6.4	5.7
Air/Rent Car	3.8	7.2	2.8	3.3	8.6	2.9	16.7	1.4	0.2	2.3	1.7	0.2
Air/Lodging/Tour	3.2	3.2	2.0	3.0	4.4	3.4	13.2	0.9	3.5	8.1	4.8	2.6
Air/Lodging/Rent Car	3.1	6.2	2.6	1.8	7.8	1.7	12.0	1.1	0.2	1.6	1.3	-
Air/Lodging/Bus	2.4	2.2	0.9	1.6	4.6	5.1	8.7	1.1	1.6	6.3	2.5	1.5
Air/Lodging/Bus/Tour	1.9	1.4	0.9	1.6	3.6	2.3	7.6	0.9	1.3	5.9	2.5	1.5
Cruise	1.5	0.5	0.1	-	-	4.7	10.1	0.8	0.3	3.8	3.0	3.9
NO	88.6%	83.0%	93.8%	89.8%	76.3%	84.5%	75.3%	96.2%	90.6%	85.9%	89.0%	85.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

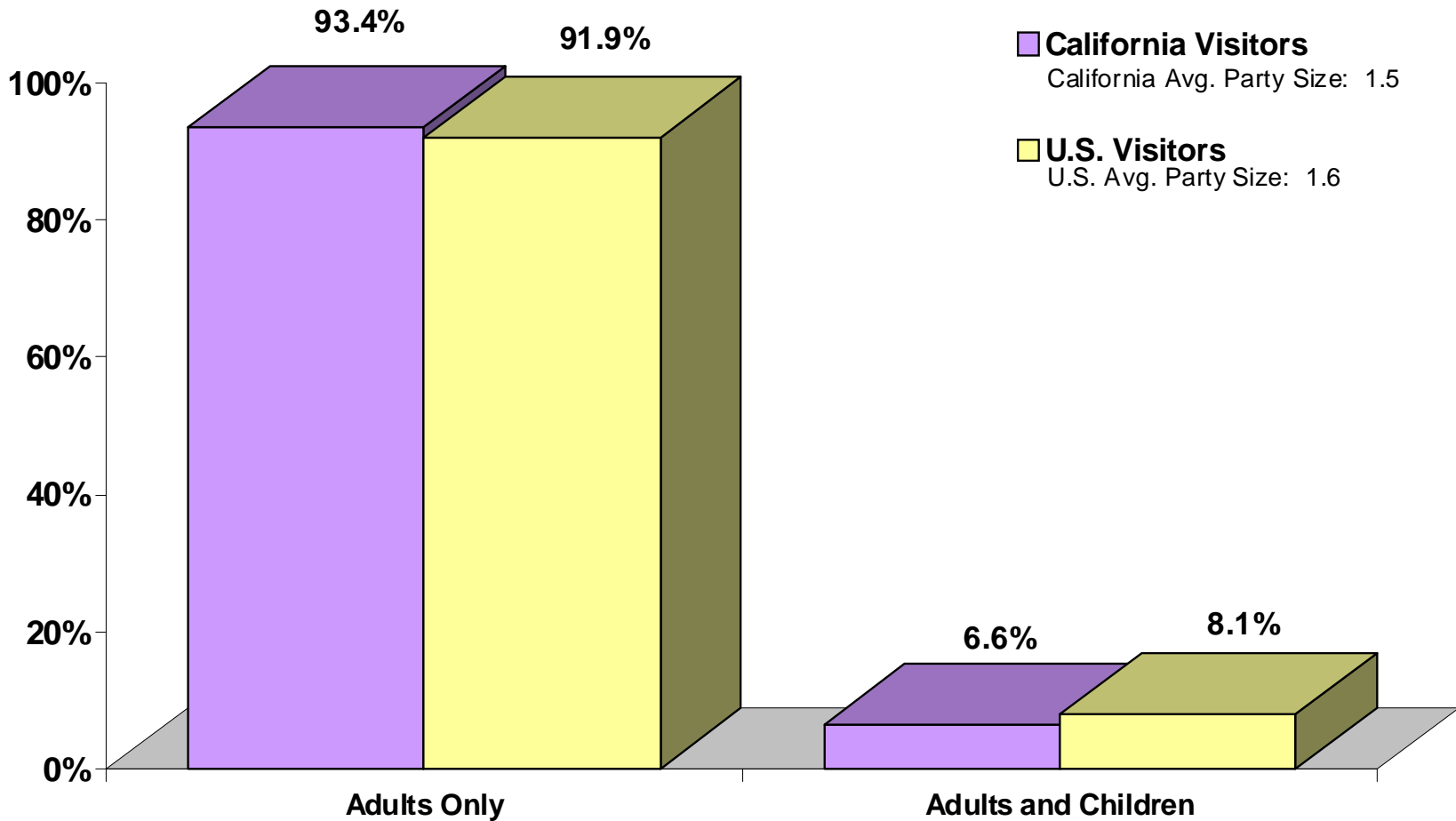
*Column percentages may not total 100 percent due to multiple response.

**Multiple response. Includes all package combinations. Each category not mutually exclusive.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 9
TRAVEL PARTY SIZE
 OVERSEAS VISITORS TO CALIFORNIA / U.S.
 (2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 12

**TRAVEL PARTY SIZE
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

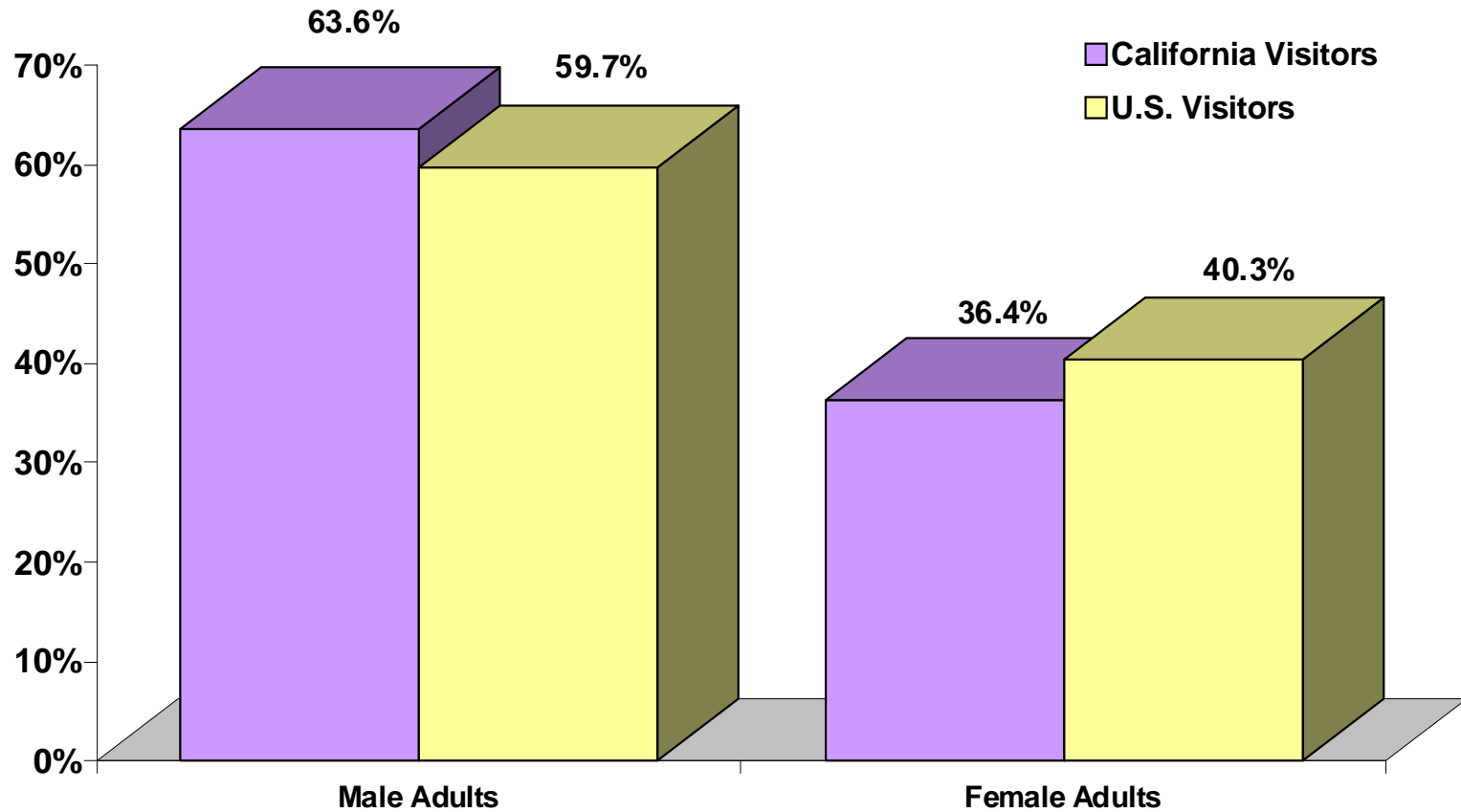
- The mean total party size for all overseas travelers was 1.5 persons. Overall, 93 percent of overseas travel parties were adults only and seven percent were adults traveling with children. The greatest proportion of visitors who reported traveling with children, were from South Korea (11%).

TRAVEL PARTY SIZE	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,749)	818,000 (995)	393,000 (331)	301,000 (251)	151,000 (265)	341,000 (550)	273,000 (678)	179,000 (481)	629,000 (1,508)	300,000 (644)	189,000 (494)	378,000 (342)
Adults Only	93.4%	93.1%	93.4%	94.9%	93.5%	92.5%	92.4%	96.5%	91.6%	89.0%	90.5%	91.0%
Adults and Children	6.6	6.9	6.6	5.1	6.5	7.5	7.6	3.5	8.4	11.0	9.5	9.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Total Party Size	1.5	1.6	1.4	1.5	1.6	1.6	1.7	1.2	1.6	1.6	1.5	1.6
Median Total Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS ONLY												
(Number of Respondents)	(6,928)	(903)	(293)	(226)	(230)	(489)	(628)	(453)	(1,349)	(563)	(446)	(290)
Average Adult Party Size	1.4	1.5	1.3	1.3	1.4	1.5	1.6	1.2	1.4	1.5	1.3	1.4
Median Adult Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS AND CHILDREN												
(Number of Respondents)	(821)	(92)*	(38)*	(25)*	(35)*	(61)*	(50)*	(28)*	(159)	(81)*	(48)*	(52)*
Average Party Size	3.5	3.7	3.1	4.3	4.4	3.5	2.9	3.4	3.4	3.1	3.3	3.8
Median Party Size	3.0	4.0	3.0	4.0	4.0	4.0	3.0	3.0	3.0	3.0	3.0	3.0

*Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 10
GENDER OF OVERSEAS VISITORS
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 13

**SEX AND AGE
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

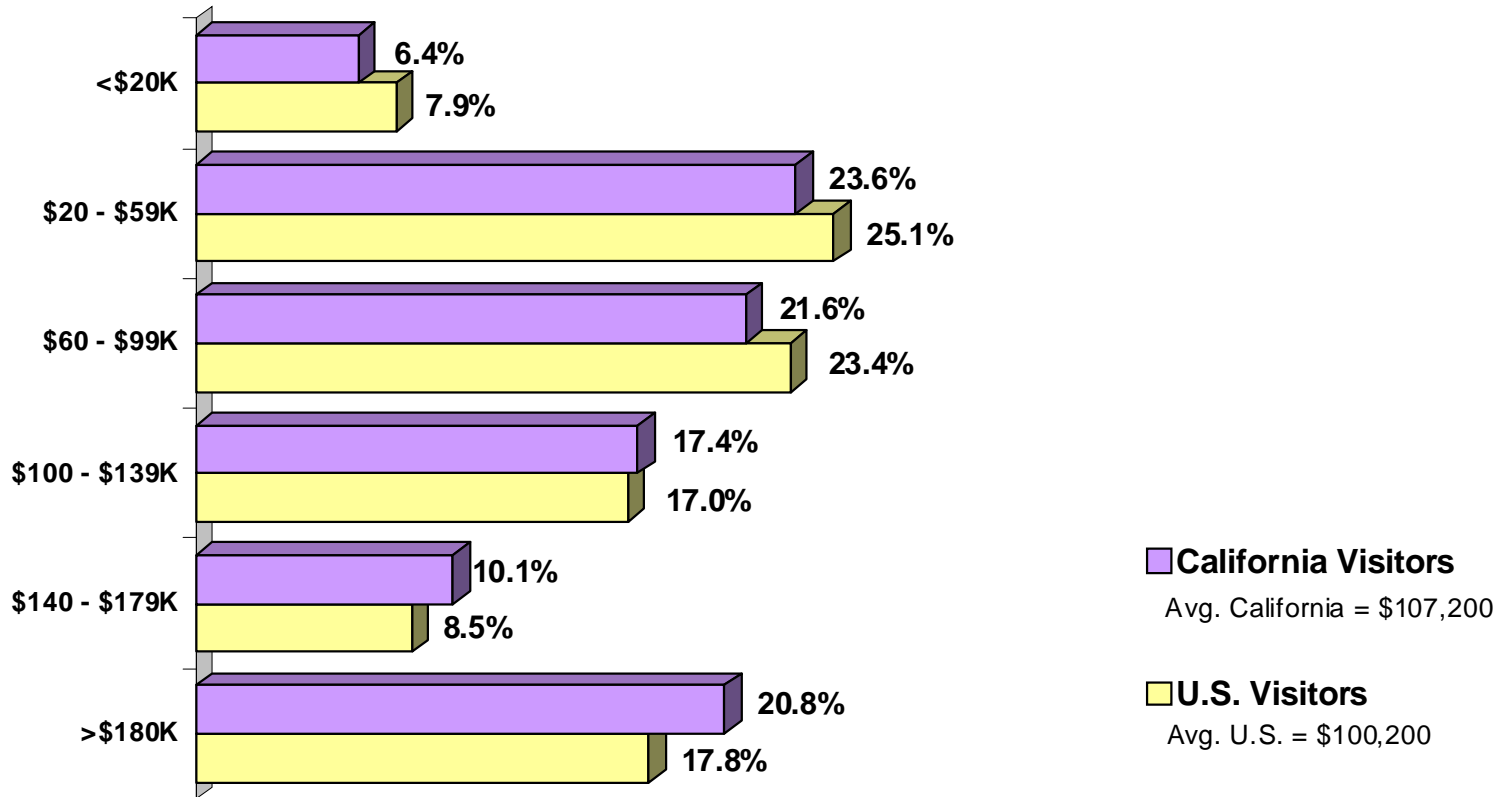
- Approximately two-thirds (64%) of overseas travelers to California were adult males, and one-third (36%) were adult females. The average age of traveling adult males was 43 years, versus 39 years for traveling adult females.

SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,126)	818,000 (919)	393,000 (307)	301,000 (229)	151,000 (226)	341,000 (504)	273,000 (583)	179,000 (449)	629,000 (1,390)	300,000 (600)	189,000 (462)	378,000 (310)
MALE ADULTS	63.6%	57.3%	62.9%	65.4%	66.4%	47.2%	69.8%	88.1%	71.9%	59.8%	62.6%	60.8%
18-24 Years	4.4	4.4	3.3	7.1	1.6	5.9	2.9	3.8	1.7	4.6	4.0	2.4
25 - 34 Years	15.2	10.8	18.8	14.9	24.5	9.9	15.2	35.8	11.7	13.9	12.4	20.9
35 - 54 Years	31.4	27.8	31.6	28.8	30.7	20.3	42.8	34.5	42.9	35.1	37.5	28.5
55 + Years	12.5	14.2	9.1	14.6	9.6	11.1	8.9	14.1	15.7	6.2	8.7	9.0
Average Male Age	42.5	44.3	41.8	41.4	40.8	43.0	41.1	39.9	44.9	40.0	41.0	41.7
Median Male Age	41.0	44.0	42.0	40.0	37.0	43.0	40.0	37.0	43.0	40.0	40.0	41.0
FEMALE ADULTS	36.4%	42.7%	37.1%	34.6%	33.6%	52.8%	30.2%	11.9%	28.1%	40.2%	37.4%	39.2%
18-24 Years	4.9	5.1	3.3	6.9	3.5	5.2	3.7	0.3	3.2	5.6	2.4	7.8
25 - 34 Years	11.2	10.3	12.2	8.6	13.9	14.6	10.3	3.4	8.5	13.4	13.2	8.6
35 - 54 Years	14.3	16.3	16.8	13.1	13.6	23.2	14.8	5.8	12.1	18.9	18.3	14.3
55 + Years	6.0	10.9	4.8	6.0	2.7	9.9	1.3	2.3	4.3	2.2	3.4	8.4
Average Female Age	39.3	42.5	39.5	38.2	35.7	42.1	35.5	42.7	39.6	36.8	39.1	39.8
Median Female Age	38.0	43.0	39.0	39.0	34.0	42.0	35.0	40.0	38.0	35.0	38.0	37.0

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 11
INCOME PROFILE OF OVERSEAS VISITORS
 OVERSEAS VISITORS TO CALIFORNIA / U.S.
 (2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 14

**ANNUAL HOUSEHOLD INCOME
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

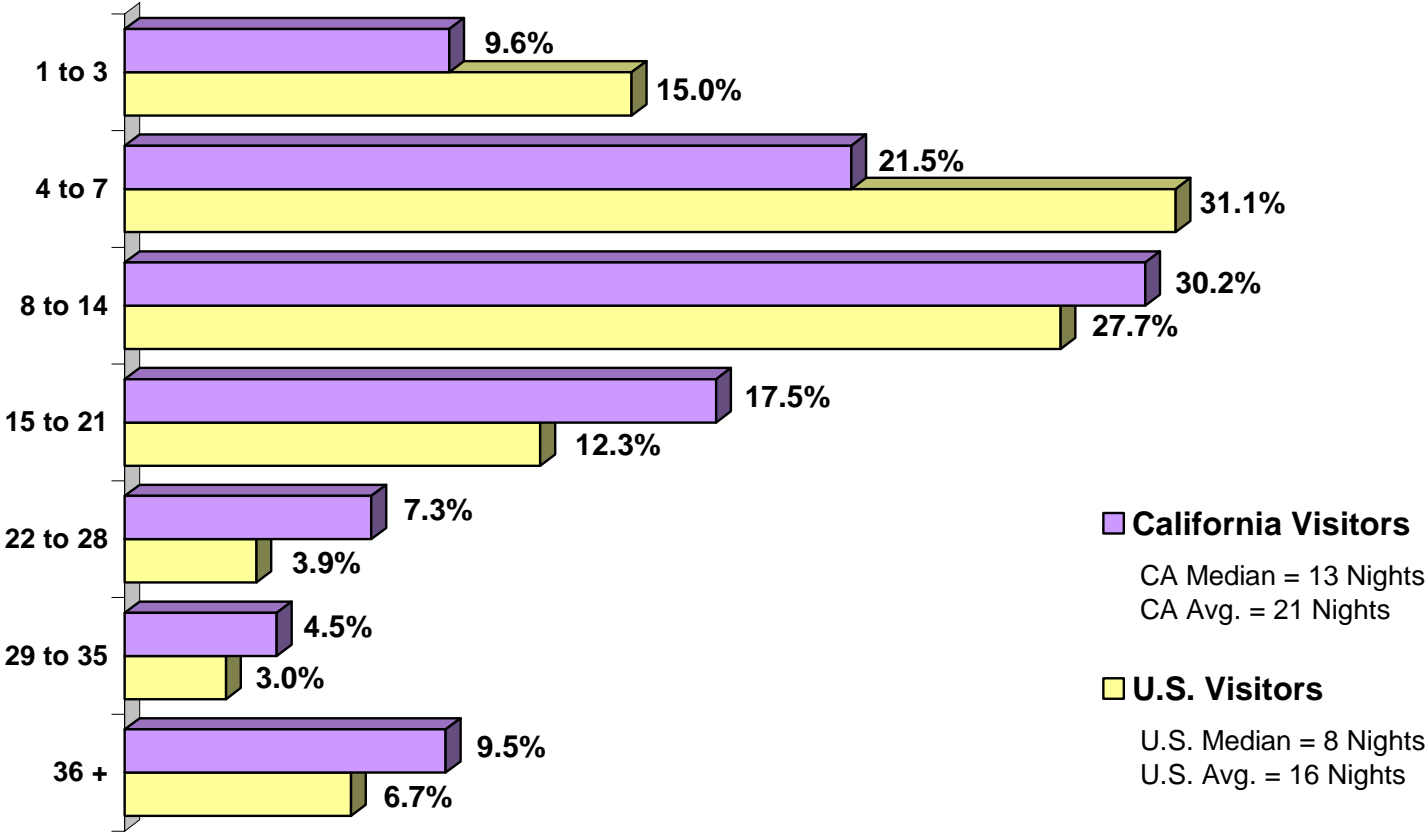
- The mean household income for overseas visitors to California in 2008 was \$107,200, up from \$101,300 in 2007 and \$94,400 in 2006. During 2008, visitors from the U.K. (\$126,700), followed by visitors from Germany (\$111,400), and Australia (\$110,200) reported the highest annual average income. Visitors from China reported the lowest annual household income at \$70,000, followed by visitors from India (\$70,600).

ANNUAL HOUSEHOLD INCOME*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	5,501,000 (6,347)	818,000 (810)	393,000 (243)	301,000 (181)	151,000 (167)	341,000 (477)	273,000 (537)	179,000 (393)	629,000 (1,219)	300,000 (561)	189,000 (438)	378,000 (264)
Under \$20,000	6.4%	2.7%	4.6%	6.4%	7.2%	3.1%	24.3%	22.4%	2.8%	4.6%	4.1%	24.3%
\$20,000 - \$59,999	23.6	15.8	20.9	36.3	29.4	20.5	38.9	33.4	19.9	22.6	32.7	20.7
\$60,000 - \$99,999	21.6	20.8	22.7	13.5	23.1	26.1	11.4	17.7	27.5	33.8	22.2	29.6
\$100,000 - \$139,999	17.4	19.3	16.9	24.6	16.5	17.9	7.9	14.4	23.9	22.9	19.2	11.7
\$140,000 - \$179,999	10.1	10.6	16.9	12.0	10.9	11.9	2.4	2.3	8.5	5.6	8.3	6.1
\$180,000 and over	20.8	30.8	18.0	7.2	12.9	20.4	14.9	9.8	17.5	10.5	13.6	7.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Annual Income	\$107,200	\$126,700	\$111,400	\$88,900	\$93,600	\$110,200	\$70,000	\$70,600	\$108,100	\$94,800	\$95,600	\$73,300
Median Annual Income	\$96,900	\$118,500	\$104,600	\$85,400	\$82,500	\$100,500	\$39,800	\$52,600	\$99,800	\$87,300	\$80,700	\$67,300

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 12
TOTAL NIGHTS IN THE U.S.
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 15

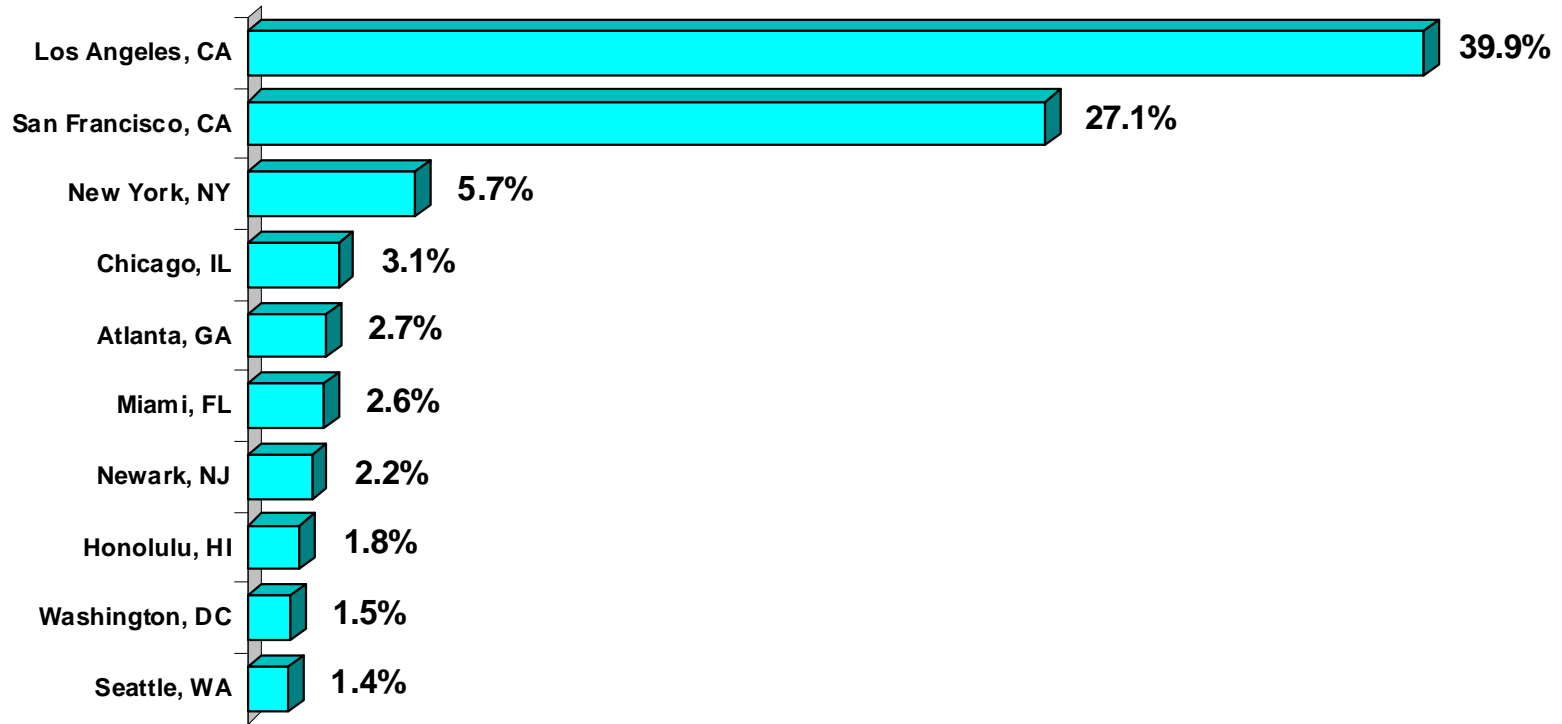
**NIGHTS AWAY FROM HOME
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Overseas visitors to California stayed an average of 21 nights in the U.S. and 11 nights in California. Nationalities varied in their average length of U.S. trip. Visitors from Mexico (air) and Japan spent the least amount of time in the U.S. (12 nights and 13 nights respectively) as well as in California (7 nights and 8 nights respectively). Visitors from Italy also spent an average of eight nights in California. Visitors from India and South Korea spent the most time in the U.S. (41 nights and 34 nights respectively) as well as in California (23 nights and 18 nights respectively).

NIGHTS IN U.S.	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,741)	818,000 (993)	393,000 (331)	301,000 (244)	151,000 (264)	341,000 (550)	273,000 (682)	179,000 (475)	629,000 (1,514)	300,000 (642)	189,000 (497)	378,000 (337)
Average No. Nights	21.2	15.7	21.0	18.6	18.9	21.7	23.7	41.4	12.5	34.2	21.1	12.2
Median No. Nights	13.0	12.0	15.0	14.0	14.0	16.0	12.0	21.0	6.0	9.0	10.0	7.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(6,865)	(924)	(295)	(209)	(232)	(513)	(563)	(386)	(1,387)	(549)	(388)	(268)
Average Nts. in Dest.	11.0	8.6	9.9	10.0	8.1	8.8	11.4	22.7	8.4	18.4	14.1	7.2
Median Nts. in Dest.	6.0	6.0	6.0	8.0	6.0	5.0	4.0	7.0	4.0	6.0	6.0	4.0

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 13
PORT OF ENTRY OF OVERSEAS VISITORS
OVERSEAS VISITORS TO CALIFORNIA
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 16

**PORT OF ENTRY
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- A high ratio of California ports of entry is expected for overseas visitors to the State. Showing an increase from 2007 (61%) as well as 2006 (62%), more than two-thirds (67%) of California visitors in 2008 reported U.S. entry either through Los Angeles (40%) or San Francisco (27%).

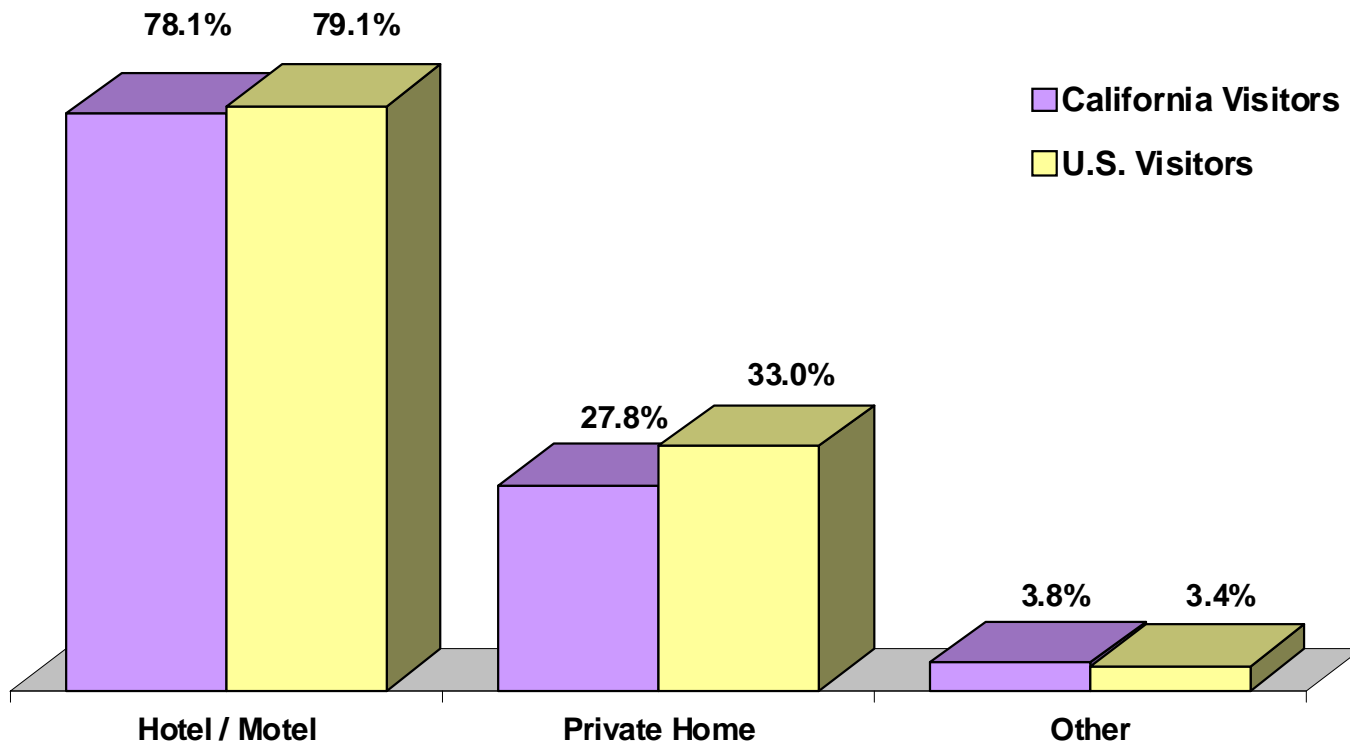
COUNTRY OF RESIDENCE OF VISITORS

PORT OF ENTRY*	TOTAL			FRANCE	ITALY	AUSTRALIA	CHINA		JAPAN	SOUTH		MEXICO
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)		w/o HK (2007-2008)	INDIA (2007-2008)		KOREA	TAIWAN	(AIR) (2007-2008)
ESTIMATED TRAVELERS	5,501,000	818,000	393,000	301,000	151,000	341,000	273,000	179,000	629,000	300,000	189,000	378,000
(Number of Respondents)	(7,780)	(996)	(332)	(251)	(266)	(551)	(690)	(481)	(1,514)	(647)	(497)	(346)
Atlanta, GA	2.7%	4.5%	3.7%	2.2%	6.8%	-	-	1.3%	-	1.4%	0.2%	-
Boston, MA	0.6	0.6	0.7	2.4	-	-	-	2.4	-	-	-	-
Chicago, IL	3.1	2.8	5.8	2.2	2.8	0.4%	6.1%	7.7	2.4%	2.4	-	0.1%
Dallas/Ft. Worth, TX	1.1	2.0	0.5	1.3	-	-	0.1	0.5	0.5	-	0.2	0.9
Detroit, MI	1.0	1.2	0.4	2.4	-	-	-	-	2.2	1.9	-	-
Honolulu, HI	1.8	0.3	0.1	-	-	10.8	8.0	-	2.6	-	-	-
Houston, TX	0.8	0.4	-	1.7	-	-	0.1	0.2	0.3	-	-	3.7
Los Angeles, CA	39.9	33.2	33.8	46.1	27.6	58.0	32.6	22.3	46.5	57.2	55.9	62.7
Miami, FL	2.6	0.7	0.7	0.9	-	1.1	0.1	-	0.1	-	0.1	-
Minn./St. Paul, MN	0.5	-	0.2	2.8	0.7	-	-	-	-	-	-	-
New York, NY	5.7	3.7	2.6	3.4	21.2	2.6	4.1	11.0	1.8	2.6	0.8	0.1
Newark, NJ	2.2	1.8	2.6	1.8	6.1	0.1	0.6	5.9	0.4	-	2.4	0.6
Orlando, FL	0.3	-	3.2	-	-	0.1	-	-	-	-	-	0.2
Philadelphia, PA	1.0	0.4	1.9	0.5	4.9	0.1	-	1.4	-	-	-	-
Portland, OR	0.1	0.1	1.1	-	0.2	-	-	0.6	-	-	-	-
San Francisco, CA	27.1	25.1	29.2	25.7	20.0	21.6	34.0	36.4	36.3	30.4	36.0	12.7
Seattle, WA	1.4	0.3	1.6	0.3	0.3	0.2	0.8	0.9	4.7	1.0	1.4	-
Washington, DC	1.5	1.0	1.3	2.0	0.4	1.0	2.6	5.1	0.5	-	0.3	-
Other	6.6	22.1	11.6	4.3	9.1	3.9	10.7	4.9	1.8	3.1	2.7	19.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 14
OVERSEAS VISITORS' ACCOMMODATIONS
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 17

**ACCOMMODATIONS
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

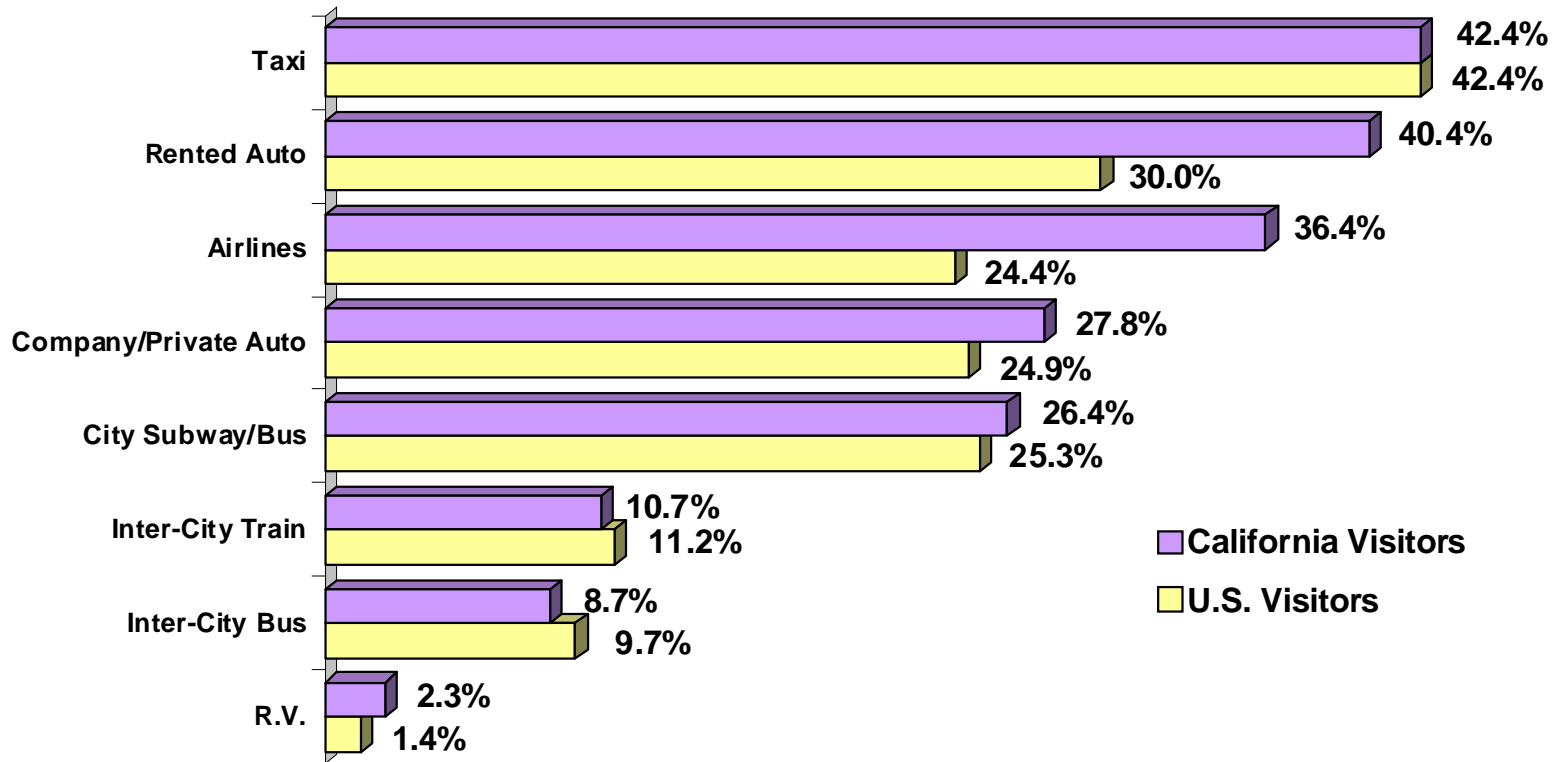
- Almost eight in ten (78%) California visitors chose to stay in a hotel/motel during their stay this year, the same as in 2007 and 2006. Visitors from Taiwan reported the lowest hotel usage (60%). Visitors from India and Taiwan made the highest use of private homes (53% and 51% each respectively).

TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL				FRANCE	ITALY	CHINA			SOUTH		MEXICO
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (6,469)	818,000 (894)	393,000 (276)	301,000 (196)	151,000 (218)	341,000 (483)	273,000 (477)	179,000 (358)	629,000 (1,308)	300,000 (501)	189,000 (367)	378,000 (244)
Hotel / Motel	78.1%	82.4%	81.7%	81.6%	84.1%	83.0%	76.2%	63.2%	83.7%	70.0%	59.5%	65.9%
Average Nights in Dest.	7.2	5.9	7.8	7.5	6.2	6.3	5.9	16.9	4.9	8.5	6.8	4.2
Median Nights in Dest.	5.0	5.0	5.0	6.0	5.0	5.0	4.0	5.0	3.0	4.0	4.0	3.0
Private Home	27.8%	21.5%	23.4%	27.6%	20.4%	22.7%	21.9%	52.7%	21.2%	36.0%	50.8%	34.9%
Average Nights in Dest.	17.7	16.2	14.6	12.6	13.9	14.3	28.1	21.5	18.5	31.6	17.2	12.1
Median Nights in Dest.	8.0	8.0	10.0	9.0	6.0	8.0	7.0	7.0	7.0	11.0	8.0	7.0
Other	3.8%	3.2%	3.8%	3.9%	3.0%	2.0%	7.1%	1.5%	1.3%	3.2%	2.0%	2.6%

*Column percentages may not total to 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 15
TRANSPORTATION IN THE U.S.
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
 CIC Research, Inc.

Table 18

**TRANSPORTATION IN THE U.S.
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

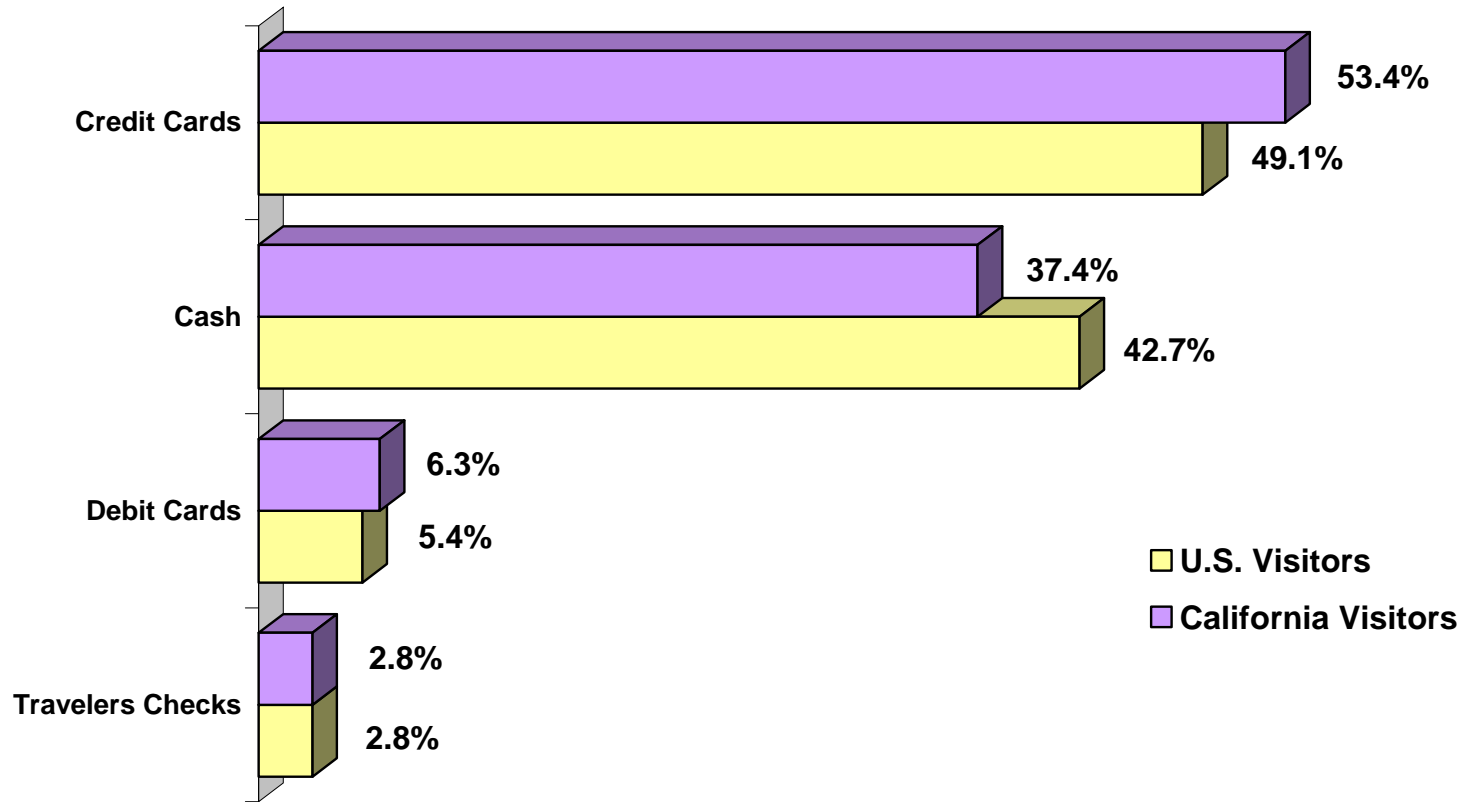
- Transportation in the U.S. used by visitors to California in 2008 was predominantly taxi/cab/limousine (42%), rented autos (40%), and airlines (36%). Use of these means of transportation was followed by use of company/private auto (28%) and city subway/tram/bus (26%).
- Visitors to California from Australia made the highest use of a taxi/cab/limousine service (61%), while visitors from Germany, Italy and France made the highest use of a rented auto (55% each respectively). Similar to results in 2007 and 2006, visitors to California from Australia and China in 2008, made the highest use of airlines to travel around the U.S. (60% and 51% respectively), and visitors from South Korea (46%), Taiwan (46%), and China (42%) in 2008, made the highest use of a company or private auto.

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (7,066)	818,000 (912)	393,000 (314)	301,000 (214)	151,000 (234)	341,000 (501)	273,000 (580)	179,000 (402)	629,000 (1,422)	300,000 (607)	189,000 (459)	378,000 (284)
Taxi/Cab/Limousine	42.4%	50.3%	39.0%	17.8%	40.9%	60.5%	34.5%	46.8%	46.5%	25.6%	26.9%	25.8%
Rented Auto	40.4	43.0	55.0	54.7	55.0	34.6	32.2	28.6	34.8	32.0	34.0	37.5
Airlines in U.S.	36.4	27.4	35.9	16.6	43.8	59.6	51.3	43.8	31.3	20.7	35.9	27.9
Company or Private Auto	27.8	24.0	21.8	21.5	19.0	20.1	42.0	19.9	37.0	46.4	45.7	32.3
City Subway/Tram/Bus	26.4	29.8	27.0	22.4	33.0	44.6	15.4	15.9	19.7	14.6	19.4	14.9
Railroad between Cities	10.7	8.3	9.8	10.7	8.8	17.8	11.0	18.4	7.8	5.1	6.1	10.8
Bus between Cities	8.7	7.4	6.8	11.4	12.5	17.1	8.9	10.1	5.8	6.4	7.8	10.2
Motor Home/Camper	2.3	3.8	3.5	0.2	-	1.3	0.6	8.7	1.0	0.9	1.5	-

*Column percentages may not total to 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 16
TRIP EXPENSES PAYMENT METHOD
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 19

**TRIP EXPENSES PAYMENT METHOD
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Trip expenses payment method used by visitors to California in 2008 was predominantly a credit card (53%) followed by cash (37%). Debit cards and travelers checks were each used by less than ten percent of travelers respectively.
- Similar to results from 2007, visitors to California in 2008 from Germany and Japan were most likely to use a credit card as a payment method (65% each respectively). On the other hand, cash was most likely to be used by visitors from South Korea and Mexico (air) (55% and 50% respectively). Visitors from Australia, the U.K., and France had the highest propensity to use debit cards (11% each respectively), whereas visitors from India had the highest propensity to use travelers checks (11%).

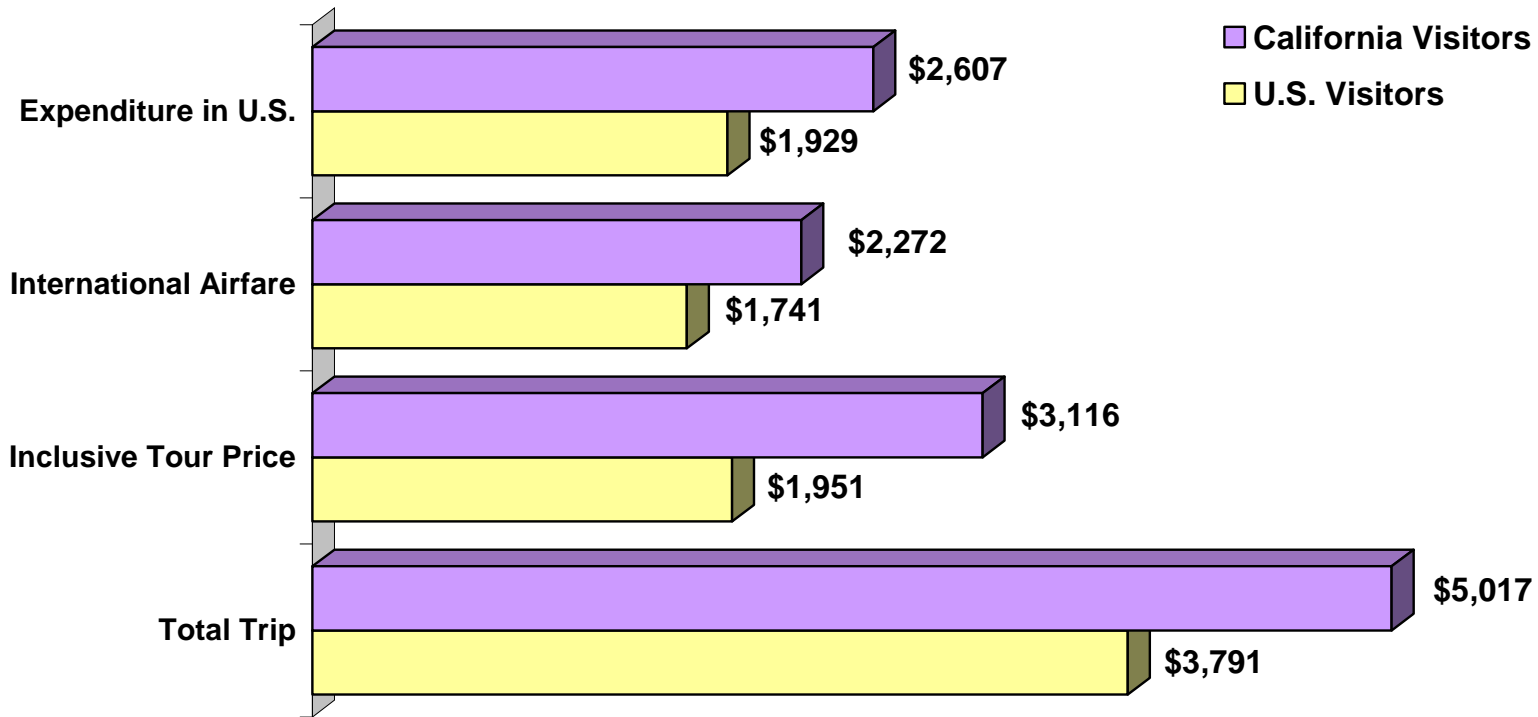
COUNTRY OF RESIDENCE OF VISITORS

TRIP EXPENSES PAYMENT METHOD*	TOTAL		FRANCE				CHINA		SOUTH			MEXICO
	OVERSEAS	U.K.	GERMANY	(2007-2008)	ITALY (2007-2008)	AUSTRALIA	w/o HK (2007-2008)	INDIA (2007-2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007-2008)
ESTIMATED TRAVELERS (Number of Respondents)	5,501,000 (6,669)	818,000 (876)	393,000 (282)	301,000 (211)	151,000 (215)	341,000 (476)	273,000 (544)	179,000 (379)	629,000 (1,334)	300,000 (570)	189,000 (432)	378,000 (276)
Credit Cards	53.4%	46.7%	65.1%	54.6%	59.6%	48.5%	54.7%	42.3%	64.5%	41.2%	53.2%	41.8%
Cash	37.4	36.6	27.3	31.2	35.0	38.4	42.9	39.8	31.2	54.5	42.8	49.6
Debit Cards	6.3	11.0	2.8	10.7	5.0	11.1	1.2	7.5	1.6	2.6	1.1	7.7
Travelers Checks	2.8	5.6	4.7	3.6	0.3	2.1	1.1	10.5	2.7	1.7	2.9	0.9

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

Figure 17
TRIP EXPENDITURES
OVERSEAS VISITORS TO CALIFORNIA / U.S.
(2008)



Source: ITA "In-Flight" Survey, 2008
CIC Research, Inc.

Table 20

**EXPENDITURES
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA
(2008)**

- Overseas visitors to California reported spending approximately \$5,017 per capita on their entire trip away from home, up 12 percent from \$4,465 in 2007. Visitors from Australia recorded the highest total trip spending (\$6,407), followed by visitors from India (\$5,562) and China (\$5,020).

COUNTRY OF RESIDENCE OF VISITORS												
AVERAGE PER VISITOR TRIP EXPENDITURES	TOTAL		FRANCE		ITALY		CHINA		SOUTH		MEXICO	
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007- 2008)
ESTIMATED TRAVELERS	5,501,000	818,000	393,000	301,000	151,000	341,000	273,000	179,000	629,000	300,000	189,000	378,000
TOTAL TRIP	\$5,017	\$4,129	\$4,524	\$4,161	\$4,922	\$6,407	\$5,020	\$5,562	\$4,151	\$4,363	\$4,585	\$2,778
(Number of Respondents)	(4,007)	(561)	(189)	(124)	(118)	(349)	(283)	(196)	(759)	(275)	(246)	(160)
INCLUSIVE TOUR PRICE	\$3,116	\$2,726	\$3,348	\$3,198	\$4,789	\$5,129	\$2,784	\$3,210	\$2,605	\$1,661	\$2,320	\$2,443
(Number of Respondents)	(675)	(112)	(21)**	(22)**	(42)**	(76)**	(93)**	(16)**	(114)	(67)**	(31)**	(12)**
INTERNATIONAL AIRFARE	\$2,272	\$2,093	\$1,940	\$1,826	\$1,973	\$3,309	\$2,109	\$2,630	\$2,598	\$1,924	\$1,868	\$1,488
(Number of Respondents)	(4,950)	(650)	(238)	(162)	(142)	(427)	(396)	(288)	(891)	(321)	(312)	(223)
EXPENDITURE IN U.S.*	\$2,607	\$1,920	\$2,382	\$1,940	\$2,335	\$2,825	\$3,043	\$2,833	\$1,849	\$2,301	\$2,266	\$1,186
(Per Day)	\$123	\$123	\$114	\$104	\$124	\$130	\$128	\$69	\$148	\$67	\$107	\$97
(Number of Respondents)	(5,071)	(698)	(220)	(148)	(134)	(384)	(377)	(286)	(1,000)	(407)	(334)	(195)
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(Number of Respondents)	(5,071)	(698)	(220)	(148)	(134)	(384)	(377)	(286)	(1,000)	(407)	(334)	(195)
TRANSPORT IN U.S.	\$425	\$283	\$432	\$315	\$392	\$390	\$608	\$573	\$277	\$391	\$560	\$159
LODGING IN U.S.	\$800	\$687	\$901	\$697	\$792	\$840	\$857	\$1033	\$689	\$600	\$578	\$268
FOOD, BEVERAGES	\$526	\$414	\$479	\$391	\$463	\$522	\$441	\$432	\$328	\$399	\$378	\$230
GIFTS, SOUVENIRS	\$450	\$225	\$260	\$297	\$418	\$487	\$704	\$480	\$283	\$448	\$431	\$350
ENTERTAINMENT	\$234	\$207	\$168	\$151	\$172	\$335	\$196	\$159	\$135	\$263	\$174	\$115
OTHER	\$135	\$77	\$120	\$65	\$72	\$227	\$143	\$131	\$96	\$152	\$114	\$37
AVERAGE NIGHTS IN U.S.	21.2	15.7	21.0	18.6	18.9	21.7	23.7	41.4	12.5	34.2	21.1	12.2
AVERAGE NIGHTS IN CALIF.	11.0	8.6	9.9	10.0	8.1	8.8	11.4	22.7	8.4	18.4	14.1	7.2
MEDIAN NIGHTS IN CALIFORNIA	6.0	6.0	6.0	8.0	6.0	5.0	4.0	7.0	4.0	6.0	6.0	4.0
SPENDING /VISITOR IN CA (est.)	\$1,353	\$1,058	\$1,129	\$1,040	\$1,004	\$1,144	\$1,459	\$1,566	\$1,243	\$1,233	\$1,509	\$698
TOTAL SPENDING IN CA (est.)	\$7,443 Mil	\$865 Mil	\$444 Mil	\$313 Mil	\$152 Mil	\$390 Mil	\$396 Mil	\$280 Mil	\$782 Mil	\$370 Mil	\$285 Mil	\$264 Mil

*Overseas visitors on exclusive tour packages were excluded.

**Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 21

**EXPENDITURES
OVERSEAS AND MEXICAN VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS*
(2008)**

- Visitors who only visited California during their U.S. trip reported spending \$4,224 per capita on their entire trip away from home, up 10% from \$3,845 per visitor in 2007. Almost half of their total trip expenditures were in California (\$1,929).
- Average daily California expenses for California-only visitors were \$113 per day, up 7% from \$106 per day in 2007. Average daily expenditures in the U.S. for all overseas visitors to California were \$123.

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$4,224
(NUMBER OF RESPONDENTS)	(1,895)
INCLUSIVE TOUR PRICE	\$3,161
(NUMBER OF RESPONDENTS)	(204)
INTERNATIONAL AIRFARE	\$2,220
(NUMBER OF RESPONDENTS)	(2,351)
EXPENDITURE IN CALIFORNIA	\$1,929
PER DAY	\$113
(NUMBER OF RESPONDENTS)	(2,482)
 <u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(2,482)
TRANSPORT IN U.S.	\$276
LODGING	\$662
FOOD, BEVERAGES	\$356
GIFTS, SOUVENIRS	\$337
ENTERTAINMENT	\$133
OTHER	\$132
 <u>AVERAGE NIGHTS IN CALIFORNIA</u>	 17.0

*Overseas visitors could report up to seven U.S. destinations.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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**OVERSEAS AND MEXICAN LEISURE VISITORS
TO CALIFORNIA³
(2008)**

³ Leisure visitors were defined as those visitors whose main purpose of trip was vacation/holidays or visiting friends and relatives.

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Table 22
RESIDENCE OF OVERSEAS AND MEXICAN LEISURE VISITORS TO THE UNITED STATES AND CALIFORNIA
(2008)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	2007/2008 Percent Change	Estimated Leisure Visitors To California	2007/2008 Percent Change*	California Share Of Visitors From This Country
EUROPE	9,104,000	15.5%	1,649,000	28.3%	18.1%
W. EUROPE	8,734,000	15.2%	1,626,000	29.2%	18.6%
Austria	129,000	44.9%	26,000	73.3%	20.2%
Belgium	161,000	43.8%	24,000	41.2%	14.9%
Denmark	164,000	11.6%	31,000	-3.1%	18.9%
France	860,000	29.1%	182,000	20.5%	21.2%
Germany	1,186,000	39.0%	291,000	69.2%	24.5%
Ireland	458,000	13.4%	66,000	57.1%	14.4%
Italy	536,000	22.4%	108,000	31.7%	20.1%
Netherlands	384,000	15.3%	94,000	44.6%	24.5%
Norway	124,000	-0.8%	17,000	-32.0%	13.7%
Spain	543,000	35.4%	82,000	164.5%	15.1%
Sweden	250,000	20.8%	50,000	38.9%	20.0%
Switzerland	222,000	12.1%	46,000	12.2%	20.7%
United Kingdom	3,418,000	2.3%	592,000	10.7%	17.3%
Other Western Europe	299,000	10.7%	56,000	273.3%	18.7%
E. EUROPE	337,000	23.9%	39,000	50.0%	11.5%
CARIBBEAN	770,000	-7.0%	13,000	85.7%	1.7%

Note: Countries and World Region visitor volumes are independently estimated and may not sum to total visitors.

* Large variances may occur due to small sample sizes.

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Table 22 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	2007/2008 Percent Change	Estimated Leisure Visitors To California	2007/2008 Percent Change*	California Share Of Visitors From This Country
SOUTH AMERICA	1,811,000	16.2%	147,000	8.1%	8.1%
Argentina	264,000	32.0%	22,000	37.5%	8.3%
Brazil	487,000	17.1%	37,000	-9.8%	7.6%
Chile	80,000	63.3%	11,000	175.0%	13.8%
Colombia	298,000	8.4%	18,000	260.0%	6.0%
Ecuador	103,000	-9.6%	11,000	-70.3%	10.7%
Peru	120,000	64.4%	7,000	133.3%	5.8%
Venezuela	408,000	10.3%	15,000	-51.6%	3.7%
Other South America	51,000	-16.4%	26,000	N.A.	51.7%
CENTRAL AMERICA (Excl. Mexico)	524,000	1.7%	84,000	-16.0%	16.0%
Costa Rica	136,000	23.6%	9,000	80.0%	6.6%
Guatemala	111,000	-26.0%	16,000	-73.3%	14.4%
Panama	60,000	-6.3%	3,000	-75.0%	5.0%
Other Central America	217,000	N.A.	56,000	N.A.	25.8%
AFRICA	149,000	-6.9%	22,000	22.2%	14.8%
South Africa, Rep. of	38,000	-29.6%	8,000	-46.7%	21.1%
Other Africa	111,000	4.7%	14,000	366.7%	12.6%
OCEANIA	645,000	2.5%	350,000	3.6%	54.3%
Australia	535,000	4.9%	281,000	7.7%	52.5%
New Zealand	97,000	-7.6%	64,000	-7.2%	66.0%
Other Oceania	13,000	-7.1%	5,000	-37.5%	38.5%

Note: Countries and World Region visitor volumes are independently estimated and may not sum to total visitors.

* Large variances may occur due to small sample sizes.

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Table 22 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	2007/2008 Percent Change	Estimated Leisure Visitors To California	2007/2008 Percent Change*	California Share Of Visitors From This Country
FAR EAST	3,970,000	-2.3%	933,000	3.0%	23.5%
Hong Kong	79,000	12.9%	57,000	21.3%	72.2%
India	190,000	10.5%	59,000	3.5%	31.1%
Indonesia	25,000	-19.4%	17,000	-5.6%	68.0%
Japan	2,547,000	-6.1%	309,000	2.7%	12.1%
Korea, South	393,000	-2.0%	146,000	-11.5%	37.2%
Malaysia	17,000	-5.6%	10,000	0.0%	58.8%
People's Republic of China	152,000	34.5%	89,000	58.9%	58.6%
Philippines	87,000	-28.7%	61,000	-15.3%	70.1%
Republic of China	150,000	-13.3%	89,000	-23.9%	59.3%
Singapore	60,000	20.0%	37,000	8.8%	61.7%
Thailand	42,000	5.0%	22,000	-4.3%	52.4%
Other Far East	228,000	42.5%	37,000	516.7%	16.2%
MIDDLE EAST	385,000	9.7%	78,000	30.0%	20.3%
Israel	202,000	5.8%	54,000	54.3%	26.7%
Saudi Arabia	23,000	9.5%	10,000	150.0%	43.5%
Turkey	49,000	32.4%	5,000	25.0%	10.2%
Other Middle East	111,000	8.8%	9,000	-47.1%	8.1%
Total Overseas Leisure Visitors (Number of Respondents)	17,325,000 (20,972)	8.6%	3,257,000 (4,164)	14.0%	18.8%
Mexico (Air Travelers Only)	1,088,000	1.1%	243,000	-20.3%	22.3%

Note: Countries and World Region visitor volumes are independently estimated and may not sum to total visitors.

* Large variances may occur due to small sample sizes.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 23

**MAIN DESTINATION BY STATE
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- California was the main U.S. state destination for almost three-quarters (74%) of overseas leisure travelers to California in 2008, similar to the proportion from previous years. The highest proportion of leisure travelers, whose main destination was California, were from France (94%), South Korea (91%), followed by Taiwan (87%). Australia reported the lowest proportion of leisure travelers with California as their main destination (43%).

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,023)	592,000 (533)	291,000 (147)	182,000 (109)	108,000 (113)	281,000 (259)	89,000 (96)**	59,000 (105)	309,000 (557)	146,000 (217)	89,000 (158)	243,000 (199)
California	73.9%	70.8%	76.1%	93.7%	72.1%	43.4%	73.5%	71.4%	80.4%	90.7%	87.4%	83.9%
New York	5.4	1.8	4.8	1.8	16.3	23.8	9.0	1.7	1.6	1.5	3.0	0.1
Nevada	3.6	5.5	1.8	1.5	1.5	3.3	1.1	-	4.0	1.2	-	0.5
Hawaiian Islands	2.2	6.9	2.0	-	0.1	0.6	2.1	-	1.5	0.1	-	3.2
Florida	1.3	1.5	1.5	0.7	0.7	2.7	6.8	0.5	0.2	-	1.5	0.3

*Visitors may report only one destination -- States with less than 1% response were not listed.

**Caution-Small sample size

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 24

**PURPOSE OF TRIP
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- More than eight in ten (85%) overseas leisure travelers to California reported they were on vacation/holiday, while 48% reported visiting friends or relatives. This is similar to results from previous years. Leisure travelers from Italy (95%) recorded the highest proportion of travelers on vacation/holiday in 2008.
- A large proportion of visitors from India (87%) and Taiwan (80%) reported coming to California to visit friends and relatives, while only 20% of travelers from Italy reported their purpose was to visit friends and relatives.

COUNTRY OF RESIDENCE OF VISITORS

PURPOSE OF TRIP*	TOTAL		FRANCE		ITALY		CHINA w/o HK (2007- 2008)		SOUTH			MEXICO
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	INDIA (2007- 2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007- 2008)	
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(4,164)	(660)	(219)	(150)	(184)	(412)	(153)	(150)	(681)	(295)	(204)	(218)
Vacation/ Holidays	84.8%	89.7%	88.1%	89.6%	94.9%	84.7%	71.3%	53.8%	83.4%	80.5%	71.7%	67.6%
Visit Friends/Relatives	48.1	37.9	41.3	39.4	19.7	44.1	53.3	86.8	47.7	65.8	79.8	66.2
Business	3.3	1.7	2.8	-	1.7	4.6	7.4	3.6	2.6	3.9	2.5	2.3
Attend Convention	1.2	0.3	-	-	1.2	1.5	1.4	0.3	1.6	1.9	0.3	-
Study	1.1	0.6	0.1	0.5	3.7	0.9	3.2	-	2.0	2.6	4.6	1.1
Other	0.9	0.8	1.2	0.5	3.1	0.7	-	-	0.9	2.4	1.8	2.7

*Column percentages may total more than 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 25

**LEISURE-RECREATION ACTIVITIES
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Overseas leisure visitors reported a greater participation rate in almost all activities, compared with all overseas visitors to California (Table 6). Shopping and dining followed by sightseeing in cities were the most common leisure and recreation activities of overseas leisure visitors to California.

LEISURE/RECREATION ACTIVITIES*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,896)	592,000 (623)	291,000 (212)	182,000 (134)	108,000 (165)	281,000 (389)	89,000 (127)	59,000 (130)	309,000 (643)	146,000 (282)	89,000 (193)	243,000 (186)
Shopping	88.7%	92.1%	83.2%	83.2%	83.3%	94.7%	97.0%	89.8%	85.2%	82.6%	95.0%	84.1%
Dining in Restaurants	87.3	96.0	82.9	80.8	71.4	92.7	83.7	80.8	87.1	56.6	83.5	59.7
Sightseeing in Cities	61.8	68.2	52.4	53.0	63.8	74.7	71.8	70.8	63.4	49.7	59.5	35.2
Visit Historical Places	53.5	62.9	57.6	64.6	68.6	60.4	53.9	52.5	15.5	18.0	41.6	40.5
Visit National Parks	47.4	55.2	60.9	62.1	66.4	36.0	37.3	30.5	20.9	49.5	27.5	15.9
Visit Small Towns	45.5	55.8	47.8	46.1	65.0	41.6	13.5	22.3	39.1	20.2	27.2	39.9
Amusement/Theme Parks	41.5	33.2	38.4	35.5	48.3	52.6	47.4	59.4	37.3	47.2	44.9	61.0
Touring Countryside	39.0	50.5	58.1	42.9	27.0	46.1	12.9	30.5	16.6	27.5	21.6	17.4
Cultural Heritage Sites	35.6	37.4	54.8	48.4	32.2	34.9	39.2	19.9	10.7	35.9	21.7	15.6
Casinos/Gambling	30.6	28.0	26.5	38.1	22.6	42.9	48.0	39.4	14.1	28.7	33.1	9.8
Art Gallery/Museum	27.5	24.7	25.0	39.1	42.8	41.0	31.3	22.4	10.8	18.5	21.3	15.7
Guided Tours	26.7	37.7	20.8	21.9	20.2	45.9	8.5	23.6	16.1	18.6	23.5	14.1
Water Sports/Sunbathing	23.9	33.0	36.8	21.3	26.2	25.6	14.1	5.6	9.3	5.1	7.6	11.8
Concert/Play/Musical	21.4	21.4	19.9	15.0	7.4	35.6	12.8	13.3	12.8	15.9	13.2	11.1
Nightclubs/Dancing	17.6	18.1	17.8	20.6	8.9	22.5	6.9	17.2	6.1	4.4	3.6	14.7
Visit Am. Indian Comm.	11.6	13.8	16.4	19.4	27.8	10.5	8.9	9.8	2.4	4.8	8.4	0.9
Camping/Hiking	11.4	14.7	14.0	16.9	8.0	7.7	3.5	7.5	5.5	3.9	5.8	0.9
Attend Sports Event	9.2	7.6	8.4	5.8	5.8	25.5	3.7	5.0	7.3	4.6	8.2	7.5
Cruises	8.5	6.4	3.6	12.0	0.5	16.5	27.8	15.8	3.7	20.8	17.1	7.4
Ethnic Heritage Sites	6.4	10.3	3.3	8.9	8.5	6.8	5.0	5.4	1.6	6.4	2.5	3.4
Environ./Eco. Excursions	6.2	4.9	1.7	18.3	13.8	6.2	10.7	2.3	0.2	1.9	5.3	4.4
Golfing/Tennis	5.3	6.5	4.1	5.8	0.6	3.1	3.6	2.9	7.2	12.8	8.5	2.1
Snow Skiing	3.4	2.9	2.3	2.0	-	5.7	2.6	0.9	0.6	1.7	6.2	-
Hunting/Fishing	1.6	1.9	1.5	0.1	1.0	2.1	0.7	0.7	0.4	0.3	1.0	2.0
Ranch Vacations	1.5	2.2	1.3	1.0	4.2	0.6	1.8	1.2	0.1	2.9	3.1	1.2

*Multiple response. Only responses greater than 1.0 percent are detailed.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 26

**ADVANCE TRIP DECISION
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Overseas leisure visitors to California reported a median advance trip decision period of 90 days, 30 days longer than the 60 days for all overseas visitors to California (Table 7). The median advance airline ticket reservation period for leisure visitors was 60 days in 2008, as well as in 2007 and 2006.
- In 2008 leisure visitors from Mexico (air) had the shortest advance trip decision period (30 days) as well as the shortest advance airline ticket reservation time (20 days). Leisure visitors from Australia and Germany reported the longest advance trip decision period (150 days and 120 days respectively), as well as the longest advance airline ticket reservation time (90 days each respectively), compared to visitors from other countries.

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(3,920)	(628)	(214)	(136)	(172)	(396)	(134)	(134)	(636)	(283)	(194)	(200)
14 Days or Less	8.7%	5.6%	2.4%	5.6%	2.0%	5.9%	6.7%	8.1%	10.2%	11.5%	12.0%	21.4%
15 - 60 Days	35.0	29.3	25.4	25.7	35.1	21.8	67.4	57.1	55.1	61.2	60.4	51.7
61 - 120 Days	23.6	26.7	24.1	28.4	31.8	20.6	16.9	16.8	21.9	19.9	17.9	11.9
121 - 180 Days	15.0	13.1	19.9	19.4	19.3	18.8	4.6	14.8	7.3	5.6	8.4	7.6
181 Days or More	17.8	25.4	28.2	20.8	11.7	32.9	4.3	3.1	5.4	1.8	1.3	7.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	118.0	139.1	153.8	127.0	109.2	169.1	65.2	74.4	71.6	58.6	61.7	61.5
Median No. of Days	90.0	90.0	120.0	90.0	90.0	150.0	60.0	60.0	60.0	50.0	45.0	30.0
ADVANCE AIRLINE RESERVATIONS*												
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(3,792)	(614)	(212)	(128)	(169)	(385)	(131)	(127)	(588)	(277)	(189)	(191)
14 Days or less	15.2%	10.8%	7.9%	13.3%	3.8%	9.5%	25.8%	16.7%	16.9%	27.2%	25.5%	35.2%
15 - 60 Days	44.1	36.6	35.3	39.6	49.3	29.6	64.9	67.5	63.1	61.2	64.3	55.3
61 - 120 Days	19.9	21.8	30.7	19.3	32.3	26.5	3.6	7.1	3.2	3.1	9.9	5.6
121 - 180 Days	12.1	14.1	14.3	15.9	12.5	19.0	3.0	8.1	4.2	1.4	0.3	3.1
181 Days or More	8.6	16.7	11.7	11.8	2.1	15.3	2.7	0.5	2.3	-	-	0.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean No. of Days	79.1	105.2	96.9	87.9	74.5	108.4	38.6	47.9	50.2	35.0	35.3	30.1
Median No. of Days	60.0	80.0	90.0	60.0	60.0	90.0	30.0	30.0	30.0	30.0	30.0	20.0

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 27

**MEANS OF BOOKING AIR TRIP AND LODGING
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Travel agents booked approximately 48% of airline ticket reservations for overseas leisure travelers to California in 2008, compared with 54% in 2007. The proportion of travel agent air bookings ranged from a low of 29% for leisure travelers from France, to a high of 85% for leisure travelers from India.
- A personal computer (i.e., Internet) was the second most common method used by overseas leisure visitors to book air trips (27%). This result has increased consistently from 25 percent in 2007, and 20% in 2006. Booking with the airline directly was the next most common method used to book air trips by leisure visitors to California (14%).
- Travel agents played a less significant role in booking U.S. lodging reservations (25%) than in booking airline reservations (48%).

MEANS OF BOOKING AIR TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007-2008)	INDIA (2007-2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007-2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (4,028)	592,000 (643)	291,000 (217)	182,000 (142)	108,000 (182)	281,000 (399)	89,000 (149)	59,000 (149)	309,000 (656)	146,000 (294)	89,000 (198)	243,000 (211)
Travel Agent	47.7%	35.2%	46.1%	28.9%	53.6%	69.7%	64.3%	85.1%	51.0%	54.2%	65.8%	47.8%
Personal Computer	27.4	37.3	27.8	44.6	29.7	12.0	4.9	3.8	23.7	24.7	13.2	34.5
Airline Directly	14.1	14.2	16.6	6.7	2.2	14.4	7.2	7.6	14.6	17.2	11.0	14.5
Tour Operator	5.1	9.5	3.6	2.7	11.4	1.8	10.2	0.6	6.4	0.6	6.0	0.7
Company Travel Dept.	1.7	0.9	2.6	0.3	0.9	0.7	5.6	2.5	1.8	1.6	2.6	-
Travel Club	0.5	0.8	-	-	0.1	0.6	0.5	-	0.2	0.3	1.1	0.2
Other/Don't Know	3.5	2.2	3.2	16.9	2.2	0.7	7.3	0.3	2.3	1.4	0.2	2.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
MEANS OF BOOKING LODGING**												
(Number of Respondents)	(3,999)	(648)	(211)	(146)	(180)	(402)	(147)	(146)	(624)	(284)	(200)	(199)
Yes, Booked by:	60.6%	68.6%	64.3%	44.8%	69.7%	64.8%	49.9%	28.1%	71.9%	63.9%	42.1%	38.0%
Travel Agent	25.1%	24.4%	30.9%	9.5%	40.0%	33.4%	27.8%	14.7%	29.4%	23.3%	21.4%	12.9%
Hotel/Motel Directly	15.2	20.8	19.0	11.7	5.6	15.5	4.2	1.2	24.7	2.5	4.2	5.7
Tour Operator	6.1	9.6	5.6	3.7	8.2	2.7	9.7	-	11.4	3.3	5.4	0.8
Friend or Relative	6.1	3.6	3.8	3.9	2.0	3.8	3.1	4.1	13.1	17.5	6.6	1.7
Company Travel Dept.	1.5	2.1	0.4	1.0	0.8	1.0	0.9	1.6	2.6	2.4	0.3	0.1
Airline Staff	0.8	1.2	0.8	-	-	0.5	0.5	1.2	0.6	1.4	1.1	3.6
Business Associate	0.3	-	-	-	-	-	0.2	-	0.1	2.7	0.3	0.8
Other	13.3	14.7	12.9	19.3	16.5	18.8	5.6	5.8	7.3	15.9	5.2	13.8
No	39.4%	31.4%	35.7%	55.2%	30.3%	35.2%	50.1%	71.9%	28.1%	36.1%	57.9%	62.0%

*Column percentages may not total to 100 percent due to rounding.

** Multiple Response. Percentages based on total number of respondents.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 28

**U.S. TRIP INFORMATION SOURCES
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Use of a personal computer as a key source of trip information and travel planning, has increased in 2008 (48%) from 2007 (44%). On the other hand, use of a travel agent has decreased in 2008 (41%) from 2007 (47%). Referring directly to the airlines, or friends/relatives (21% each respectively) were the next most frequently mentioned trip information sources among leisure travelers to California.
- Use of a personal computer was highest among leisure visitors from Germany (58%), Japan (54%), France (53%) and the U. K. (52%), and lowest among leisure visitors from India (14%). Use of a travel agency was highest among leisure visitors from Australia (63%) and India (62%), and lowest among leisure visitors from Germany (27%) and Mexico (air) (29%).

INFORMATION SOURCES*	COUNTRY OF RESIDENCE OF VISITORS												
	TOTAL				FRANCE	ITALY				CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	SOUTH	
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	(2007- 2008)	(2007- 2008)	JAPAN	KOREA	TAIWAN	(2007- 2008)	
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (4,106)	592,000 (657)	291,000 (217)	182,000 (149)	108,000 (182)	281,000 (409)	89,000 (142)	59,000 (148)	309,000 (666)	146,000 (294)	89,000 (202)	243,000 (214)	
Personal Computer	48.3%	52.0%	57.9%	53.3%	39.6%	49.3%	21.0%	13.6%	54.0%	47.8%	36.0%	32.0%	
Travel Agency	41.0	35.4	26.5	30.9	50.2	62.5	41.6	62.4	42.5	39.2	50.4	28.8	
Airlines Directly	21.3	26.4	29.5	14.5	11.3	13.9	16.5	10.3	20.0	16.6	20.7	21.9	
Friends/Relatives	20.5	15.5	17.5	20.3	13.1	20.5	13.1	25.7	26.4	28.3	21.9	24.1	
Published Sources	13.7	12.7	25.3	9.4	11.0	10.4	3.2	3.7	25.2	7.9	4.3	5.7	
Government Sources	7.4	2.6	27.7	1.7	8.0	5.5	3.2	5.8	5.7	2.6	0.9	4.2	
Tour Company	6.9	12.6	2.9	6.6	3.7	3.7	11.0	1.6	13.9	6.0	5.4	2.5	
Newspapers/Magazines	4.0	4.2	8.5	1.2	3.4	4.7	4.9	2.2	5.5	5.8	1.0	0.3	
Corporate Travel Dept.	1.9	0.2	2.8	0.2	0.5	0.6	6.4	1.4	3.6	0.9	5.1	-	
In-flight Info. Systems	1.1	0.7	0.8	2.9	0.5	0.3	3.1	0.5	1.9	1.9	1.3	1.3	
TV/Radio Ads	1.1	0.9	2.4	1.3	0.8	1.7	-	0.2	0.3	1.6	1.2	-	

*Column percentages may not total to 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 29

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Most of the overseas leisure travelers to California (79%) purchased a coach class ticket, particularly visitors from France (94%), Italy (87%), and India (86%).
- More than 15 percent of overseas leisure travelers to California used a prepaid package.

COUNTRY OF RESIDENCE OF VISITORS

TYPE OF AIRLINE TICKET	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,914)	592,000 (636)	291,000 (214)	182,000 (136)	108,000 (167)	281,000 (389)	89,000 (134)	59,000 (138)	309,000 (638)	146,000 (283)	89,000 (189)	243,000 (188)
Economy/Tourist/Coach	79.1%	78.1%	76.8%	94.0%	87.2%	78.2%	78.8%	85.8%	72.2%	80.5%	68.9%	82.1%
Executive/Business	9.8	13.9	10.4	1.6	7.5	8.3	7.1	9.9	10.8	9.4	15.4	4.4
Frequent Flyer Award	5.1	2.4	8.5	2.8	4.9	7.3	2.5	2.1	7.3	0.8	4.1	10.4
First Class	2.1	1.8	1.4	0.8	0.8	2.6	1.4	1.7	0.7	1.3	3.6	2.5
Discount/Group Fare	1.7	1.3	1.0	0.7	-	1.0	9.2	0.5	4.6	2.0	4.1	0.6
Frequent Flyer Upgrade	1.6	1.1	0.9	0.8	0.1	1.6	1.4	-	1.6	7.9	6.9	2.2
Non-revenue	1.4	0.7	1.2	-	-	1.1	-	-	1.5	-	-	-
Don't Know	1.9	2.0	3.4	2.2	-	1.1	2.0	0.5	4.9	2.7	1.3	2.1
USE OF PREPAID PACKAGE												
(Number of Respondents)	(4,031)	(650)	(215)	(142)	(177)	(405)	(133)	(137)	(667)	(280)	(198)	(204)
Yes***	15.4%	22.7%	8.1%	12.8%	24.8%	18.3%	34.3%	5.3%	16.6%	15.0%	10.5%	11.5%
Air/Lodging	10.4%	16.2%	5.9%	9.1%	15.9%	10.8%	22.3%	1.8%	14.5%	11.0%	8.4%	6.0%
Guided Tour	7.2	8.4	3.6	7.7	10.8	8.6	29.9	3.4	8.0	13.8	6.6	8.1
Air/Rent Car	4.9	9.8	3.4	3.2	8.4	3.1	23.0	1.1	0.3	1.4	1.9	0.2
Air/Lodging/Rent Car	4.3	8.5	3.3	2.7	8.3	1.5	18.2	1.0	0.3	1.4	1.1	-
Air/Lodging/Tour	4.1	4.1	2.6	5.1	4.9	3.6	20.6	1.6	6.1	9.8	4.6	3.1
Air/Lodging/Bus	3.3	2.8	1.4	2.7	4.6	6.2	16.4	1.8	3.0	7.5	4.6	1.4
Air/Lodging/Bus/Tour	2.6	1.7	1.4	2.7	3.7	2.7	16.1	1.6	2.4	6.8	4.6	1.4
Cruise	2.1	0.6	0.1	-	-	5.9	22.8	1.5	0.5	5.8	5.8	6.4
No	84.6%	77.3%	91.9%	87.2%	75.2%	81.7%	65.7%	94.7%	83.4%	85.0%	89.5%	88.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

***Multiple response. Includes all package combinations. Each category not mutually exclusive.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 30

**TRAVEL PARTY SIZE
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Almost nine in ten (89%) of all leisure travel groups to California consisted of adults only, while 11% were adults traveling with children. The mean total party size for leisure travelers was 1.7 persons. These results are very similar to those from previous years.

TRAVEL PARTY SIZE*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL				FRANCE	ITALY	CHINA			SOUTH		
	OVERSEAS	U.K.	GERMANY	(2007-2008)	(2007-2008)	AUSTRALIA	w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	KOREA	TAIWAN	(AIR) (2007- 2008)
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(4,151)	(660)	(218)	(150)	(184)	(411)	(151)	(150)	(676)	(295)	(203)	(217)
Adults Only	89.3%	90.2%	89.7%	89.9%	89.0%	90.1%	81.3%	90.3%	82.1%	86.1%	82.1%	86.0%
Adults and Children	10.7	9.8	10.3	10.1	11.0	9.9	18.7	9.7	17.9	13.9	17.9	14.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean Total Party Size	1.7	1.8	1.6	1.9	1.9	1.7	1.7	1.6	1.8	1.6	1.7	1.7
Median Total Party Size	1.0	2.0	1.0	2.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS ONLY												
(Number of Respondents)	(3,470)	(574)	(183)	(130)	(152)	(353)	(122)	(133)	(547)	(241)	(165)	(170)
Mean Adult Party Size	1.5	1.6	1.4	1.7	1.6	1.5	1.4	1.4	1.5	1.3	1.3	1.4
Median Adult Party Size	1.0	2.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS AND CHILDREN												
(Number of Respondents)	(681)	(86)**	(35)**	(20)**	(32)**	(58)**	(29)**	(17)**	(129)	(54)**	(38)**	(47)**
Mean Party Size	3.5	3.7	3.1	4.4	4.4	3.5	2.7	3.7	3.4	3.3	3.2	3.9
Median Party Size	3.0	4.0	3.0	4.0	4.0	4.0	2.0	3.0	3.0	3.0	3.0	3.0

*Column percentages may total more than 100 percent due to rounding.

**Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 31

**SEX AND AGE
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Similar to previous years, 53% of overseas leisure travelers to California in 2008 were male and 47% female. The median age for males in 2008 was 42 years, versus 38 years for females. These results were slightly lower than those from 2007 (45 years and 40 years respectively).

SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,786)	592,000 (612)	291,000 (201)	182,000 (136)	108,000 (159)	281,000 (371)	89,000 (129)	59,000 (133)	309,000 (617)	146,000 (273)	89,000 (188)	243,000 (195)
MALE ADULTS	52.5%	48.9%	57.2%	55.0%	60.9%	42.7%	56.5%	73.9%	53.6%	44.8%	47.4%	51.5%
18-24 Years	4.6	5.4	3.7	8.1	1.0	5.8	4.8	1.4	1.6	6.2	1.7	2.0
25 - 34 Years	13.6	10.0	19.5	16.0	24.1	11.1	6.3	7.9	10.4	11.2	5.6	24.9
35 - 54 Years	21.6	17.2	26.6	18.4	28.1	15.6	22.5	28.1	28.7	22.3	28.2	13.8
55 + Years	12.8	16.3	7.5	12.5	7.8	10.1	22.8	36.5	13.0	5.1	11.7	10.8
Average Male Age	43.2	45.8	40.6	40.2	40.7	42.3	47.4	51.7	44.1	38.8	45.5	39.9
Median Male Age	42.0	46.0	41.0	39.0	36.0	41.0	43.0	54.0	41.0	39.0	45.0	34.0
FEMALE ADULTS	47.5%	51.1%	42.8%	45.0%	39.1%	57.3%	43.5%	26.1%	46.4%	55.2%	52.6%	48.5%
18-24 Years	6.0	5.9	4.4	8.9	3.7	5.6	2.2	-	5.6	6.8	3.1	8.1
25 - 34 Years	14.7	12.5	13.6	11.6	14.8	16.2	15.6	2.8	14.1	16.3	19.4	9.7
35 - 54 Years	18.7	18.6	20.2	14.5	16.5	25.3	22.2	17.5	19.3	28.1	23.6	18.4
55 + Years	8.1	14.1	4.6	9.8	4.1	10.2	3.4	5.9	7.4	4.1	6.4	12.3
Average Female Age	39.5	43.0	39.0	38.8	36.8	41.9	38.3	45.4	39.7	38.4	39.2	41.6
Median Female Age	38.0	43.0	39.0	39.0	35.0	42.0	37.0	45.0	38.0	39.0	38.0	39.0

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 32

**ANNUAL HOUSEHOLD INCOME
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Overseas leisure travelers to California in 2008 had a median household income of \$91,000. This is a 7.8% increase from \$84,400 in 2007. The median household income for all overseas travelers to California in 2008 (Table 14) was \$96,900.
- Once again, overseas leisure visitors from the U.K. reported the highest median household income (\$105,200), followed by Germany (\$96,900). Leisure visitors from India (\$43,800) and Mexico (air) (\$45,900) reported the lowest median household income.

ANNUAL HOUSEHOLD INCOME*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	3,257,000 (3,270)	592,000 (530)	291,000 (154)	182,000 (99)**	108,000 (119)	281,000 (347)	89,000 (120)	59,000 (116)	309,000 (511)	146,000 (247)	89,000 (177)	243,000 (160)
Under \$20,000	6.2%	3.6%	4.8%	10.1%	7.5%	2.3%	26.0%	34.6%	3.5%	5.6%	3.8%	37.3%
\$20,000 - \$59,000	25.6	19.4	22.3	42.7	27.3	22.6	26.3	25.6	28.9	21.9	33.8	20.1
\$60,000 - \$99,999	23.2	23.5	25.1	12.7	23.2	28.0	16.6	11.4	27.4	28.7	23.0	23.4
\$100,000 - \$139,999	18.1	22.0	17.6	26.8	13.8	18.2	12.0	11.9	20.9	26.4	13.3	9.8
\$140,000 - \$179,999	9.9	10.2	17.0	3.5	14.4	11.3	5.1	1.9	6.7	2.9	12.5	2.5
\$180,000 and over	17.1	21.3	13.2	4.2	13.7	17.6	14.1	14.5	12.5	14.4	13.5	6.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Annual Income	\$101,700	\$113,400	\$105,600	\$75,200	\$97,400	\$105,500	\$76,500	\$69,900	\$95,000	\$98,900	\$96,300	\$60,100
Median Annual Income	\$91,000	\$105,200	\$96,900	\$58,300	\$85,600	\$94,800	\$53,900	\$43,800	\$84,400	\$91,300	\$76,200	\$45,900

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 33

**NIGHTS AWAY FROM HOME
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Overseas leisure visitors to California in 2008 had an average U.S. trip stay of 20 nights and an average stay in California of 10 nights. Japanese leisure travelers reported the shortest trip stays in the U.S. (10 nights), as well as in California (7 nights). On the other hand, leisure travelers from India reported the longest stay in the U.S. and in California (49 nights and 24 nights respectively).

NIGHTS IN U.S.	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(4,140)	(658)	(218)	(145)	(183)	(411)	(149)	(147)	(681)	(291)	(204)	(210)
Mean No. Nights	19.8	15.5	20.8	18.6	15.8	21.4	32.4	49.3	9.8	23.0	17.2	14.6
Median No. Nights	14.0	14.0	17.0	15.0	14.0	17.0	14.0	31.0	6.0	12.0	12.0	10.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(3,662)	(610)	(191)	(121)	(156)	(385)	(117)	(120)	(612)	(244)	(159)	(163)
Mean Nts. in Dest.	10.4	7.9	8.8	11.0	7.7	8.6	20.5	24.2	7.1	15.7	13.0	9.3
Median Nts. in Dest.	7.0	6.0	7.0	9.0	6.0	6.0	5.0	10.0	5.0	8.0	8.0	6.0

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 34

**PORT OF ENTRY
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Once again, Los Angeles was the major port of entry for all leisure travelers to California (41%) followed by San Francisco (24%).

PORT OF ENTRY*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (4,164)	592,000 (660)	291,000 (219)	182,000 (150)	108,000 (184)	281,000 (412)	89,000 (153)	59,000 (150)	309,000 (681)	146,000 (295)	89,000 (204)	243,000 (218)
Atlanta, GA	2.4%	2.7%	2.4%	2.0%	5.4%	-	-	4.5%	-	-	-	-
Boston, MA	0.6	0.5	0.3	1.4	-	-	-	3.5	-	-	-	-
Chicago, IL	2.5	2.3	5.4	1.5	2.9	0.4%	2.4%	5.2	1.5%	2.2%	-	0.1%
Cincinnati, OH	0.5	0.2	3.9	1.5	1.3	-	-	-	-	-	-	-
Dallas/Ft. Worth, TX	1.0	1.7	0.4	1.9	-	-	-	0.5	-	-	0.4%	0.6
Detroit, MI	1.3	1.7	0.6	1.3	-	-	-	-	4.7%	4.0	-	-
Honolulu, HI	2.8	0.3	0.2	0.1	-	13.7	21.4	-	5.5	-	-	-
Houston, TX	1.0	0.5	-	2.3	-	-	-	0.5	-	-	-	2.9
Las Vegas, NV	5.1	22.7	2.3	-	-	0.1	0.6	-	0.1	-	-	3.2
Los Angeles, CA	40.6	33.3	35.0	47.2	30.0	57.0	35.4	21.0	50.2	59.2	61.5%	67.2
Miami, FL	2.0	0.7	0.8	0.8	-	1.4	-	-	0.2	-	0.3	-
Minn./St. Paul, MN	0.8	-	0.4	4.6	1.1	-	-	-	-	-	-	-
New York, NY	6.1	3.7	2.3	3.7	25.9	2.7	3.8	14.0	0.9	2.4	-	0.2
Newark, NJ	2.0	1.0	2.2	2.4	6.7	0.2	0.7	5.9	-	-	2.6	-
Philadelphia, PA	1.3	0.2	2.4	0.5	6.2	-	-	0.5	-	-	-	-
San Francisco, CA	23.7	22.9	27.6	24.3	14.1	19.4	28.7	39.1	31.7	28.8	31.6	12.8
Seattle, WA	1.1	0.2	1.9	0.4	-	0.3	0.7	-	2.5	1.3	2.7	-
Washington, DC	1.2	1.3	0.6	1.2	0.6	0.8	-	-	0.3	-	-	-
Other Port	3.9	4.1	11.2	2.8	5.8	4.0	6.2	5.2	2.3	2.1	0.9	13.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.

CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 35

**ACCOMMODATIONS
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Three-quarters (75%) of overseas leisure travelers to California reported staying in hotels or motels at some time during their trip, and 34 percent reported staying in private homes. Hotel usage was highest among visitors from Italy, Australia, and the U.K. (86%, 82%, and 80% respectively). Hotel usage was lowest among visitors from India (39%). A high proportion of Indian (77%), Taiwanese (75%), and South Korean (61%) leisure travelers stayed in private homes.

TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,428)	592,000 (591)	291,000 (175)	182,000 (111)	108,000 (143)	281,000 (361)	89,000 (99)**	59,000 (112)	309,000 (579)	146,000 (214)	89,000 (148)	243,000 (153)
Hotel / Motel	74.8%	80.2%	76.8%	76.1%	85.8%	82.0%	57.5%	39.1%	74.0%	52.2%	43.3%	51.3%
Mean Nights in Dest.	7.1	6.3	6.2	8.4	6.3	6.1	3.7	9.4	4.3	6.2	6.3	5.3
Median Nights in Dest.	5.0	6.0	5.0	6.0	5.0	5.0	3.0	3.0	3.0	4.0	4.0	4.0
Private Home	34.2%	24.0%	27.5%	36.7%	19.9%	23.8%	41.6%	76.7%	34.8%	61.2%	75.2%	49.2%
Mean Nights in Dest.	14.3	10.9	13.4	11.4	11.1	13.2	47.2	23.4	10.1	21.8	13.8	13.3
Median Nights in Dest.	8.0	8.0	10.0	9.0	6.0	8.0	24.0	12.0	6.0	12.0	7.0	7.0
Other	3.4%	3.3%	4.8%	6.0%	2.1%	2.3%	8.9%	1.4%	0.6%	3.1%	1.4%	4.5%

*Column percentages may not total to 100 percent due to multiple responses.

**Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CiC Research, Inc., and the California Travel and Tourism Commission.

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Table 36

**TRANSPORTATION IN THE U.S.
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Leisure travelers relied upon a variety of transportation means within the U.S. including rental cars (44%), taxis/limousines (37%), domestic flights (35%), subways/trams/buses (30%), and private or company autos (29%). The proportion of leisure visitors to California who made use of a rental car in 2008 (44%), has increased from 37 percent in 2007.
- Rental car use was highest among German, Italian and French leisure visitors (61%, 57%, and 57% respectively). Leisure visitors from Australia relied heavily on the use of taxi/cab/limousines (57%), as well as domestic airline travel (61%) and the city subway/tram/bus (47%). Leisure visitors from South Korea, Taiwan, and China relied heavily on a company or private auto (63%, 52%, and 50%, respectively).

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
(Number of Respondents)	(3,749)	(602)	(209)	(125)	(167)	(372)	(125)	(115)	(626)	(276)	(184)	(182)
Rented Auto	44.2%	45.5%	60.9%	56.9%	57.3%	34.8%	25.7%	28.3%	33.2%	22.4%	31.7%	42.5%
Taxi/Cab/Limousine	36.8	46.2	36.9	11.8	40.0	57.3	27.7	27.3	33.9	20.9	17.1	13.7
Airlines in U.S.	34.7	28.3	36.2	13.3	40.0	60.6	42.7	48.4	26.2	18.5	36.0	33.6
City Subway/Tram/Bus	30.3	33.3	28.5	27.6	37.1	46.8	20.2	15.7	19.6	15.5	18.3	14.7
Company or Private Auto	28.7	26.1	21.4	19.5	16.6	21.0	49.7	24.1	44.0	62.5	52.4	39.7
Railroad between Cities	11.3	7.1	10.5	12.1	11.5	17.9	10.4	26.4	10.0	3.6	7.7	8.5
Bus between Cities	10.7	7.5	7.0	16.4	15.7	19.0	13.7	19.6	8.4	6.3	10.5	9.1
Motor Home/Camper	3.3	4.9	4.8	-	-	1.7	0.5	15.0	1.3	1.9	0.9	-

*Column percentages may not total to 100 percent due to multiple responses.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 37

**TRIP EXPENSES PAYMENT METHOD
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Leisure travelers to California predominantly used credit cards (46%) and cash (43%) as a method of payment for their trip expenses. Leisure visitors from Germany (61%), Italy (56%) and Japan (55%) had the highest use of credit cards, while leisure visitors from South Korea (63%), Mexico (air) (56%), China and India (55% each respectively) had the highest use of cash.

TRIP EXPENSES PAYMENT METHOD*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007- 2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS (Number of Respondents)	3,257,000 (3,526)	592,000 (573)	291,000 (185)	182,000 (123)	108,000 (150)	281,000 (348)	89,000 (115)	59,000 (112)	309,000 (595)	146,000 (261)	89,000 (174)	243,000 (169)
Credit Cards	46.2%	39.2%	60.8%	51.8%	55.5%	44.1%	43.9%	27.9%	55.3%	34.2%	45.9%	36.4%
Cash	42.8	41.3	29.6	38.0	39.2	41.5	54.5	54.9	38.7	62.5	48.4	55.6
Debit Cards	7.0	11.9	3.1	4.3	4.8	12.2	1.6	5.3	2.2	1.0	1.0	6.4
Travelers Checks	3.9	7.6	6.6	5.9	0.5	2.1	-	11.9	3.8	2.3	4.7	1.6

*Column percentages may not total to 100 percent due to rounding.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 38

**TRIP EXPENDITURES
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA
(2008)**

- Overseas leisure travelers in 2008 reported total expenditures in the U.S. of \$2,206, 13 percent higher than that reported in 2007 (\$1,953). The 2008 mean daily expenditure was \$112 per visitor, up 15 percent from \$97 per day in 2007. As a comparison, all overseas travelers to California reported U.S. expenditures of \$2,607 or \$123 per day (Table 20).
- Leisure visitors from Australia reported the highest international airfare per visitor per trip (\$2,880), while Mexican (air) and French travelers reported the least expensive international airfare (\$1,051 and \$1,162 respectively).

AVERAGE PER VISITOR TRIP EXPENDITURES	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	U.K.	GERMANY	FRANCE (2007-2008)	ITALY (2007-2008)	AUSTRALIA	CHINA w/o HK (2007-2008)	INDIA (2007- 2008)	JAPAN	SOUTH KOREA	TAIWAN	MEXICO (AIR) (2007- 2008)
ESTIMATED TRAVELERS	3,257,000	592,000	291,000	182,000	108,000	281,000	89,000	59,000	309,000	146,000	89,000	243,000
TOTAL TRIP (Number of Respondents)	\$4,112 (2,162)	\$3,430 (377)	\$4,055 (125)	\$3,039 (69)	\$4,197 (79)	\$5,934 (252)	\$4,648 (59)	\$3,502 (57)	\$3,193 (344)	\$3,637 (137)	\$3,265 (102)	\$2,560 (104)
INCLUSIVE TOUR PRICE (Number of Respondents)	\$3,101 (516)	\$2,683 (103)	\$3,389 (19)**	\$2,822 (17)**	\$4,826 (35)**	\$5,090 (68)**	\$2,936 (23)**	\$2,751 (7)**	\$2,522 (94)**	\$1,789 (33)**	\$2,035 (13)**	\$4,135 (7)**
INTERNATIONAL AIRFARE (Number of Respondents)	\$1,712 (2,646)	\$1,509 (426)	\$1,492 (156)	\$1,162 (91)**	\$1,486 (94)**	\$2,880 (302)	\$1,780 (88)**	\$1,884 (102)	\$1,532 (386)	\$1,737 (157)	\$1,405 (130)	\$1,051 (143)
EXPENDITURE IN U.S.* (Per Day) (Number of Respondents)	\$2,206 \$112 (2,599)	\$1,694 \$109 (443)	\$2,269 \$109 (140)	\$1,547 \$83 (79)**	\$2,024 \$128 (92)**	\$2,667 \$124 (278)	\$2,617 \$81 (72)**	\$1,746 \$35 (68)**	\$1,489 \$151 (427)	\$1,810 \$79 (190)	\$1,666 \$97 (128)	\$1,103 \$76 (117)
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(NUMBER OF RESPONDENTS)	(2,599)	(443)	(140)	(79)**	(92)**	(278)	(72)**	(68)**	(427)	(190)	(128)	(117)
TRANSPORT IN U.S.	\$357	\$228	\$465	\$312	\$357	\$364	\$584	\$332	\$198	\$296	\$250	\$110
LODGING IN U.S.	\$570	\$471	\$716	\$350	\$574	\$712	\$350	\$180	\$393	\$319	\$286	\$204
FOOD, BEVERAGES	\$461	\$415	\$496	\$373	\$469	\$523	\$360	\$243	\$284	\$293	\$363	\$219
GIFTS, SOUVENIRS	\$410	\$230	\$290	\$279	\$399	\$496	\$905	\$730	\$328	\$494	\$491	\$341
ENTERTAINMENT	\$250	\$233	\$181	\$178	\$174	\$372	\$263	\$177	\$185	\$190	\$213	\$148
OTHER	\$132	\$90	\$100	\$32	\$32	\$178	\$113	\$64	\$65	\$169	\$39	\$52
AVERAGE NIGHTS IN U.S.	19.8	15.5	20.8	18.6	15.8	21.4	32.4	49.3	9.8	23.0	17.2	14.6
AVERAGE NIGHTS IN CALIF.	10.4	7.9	8.8	11.0	7.7	8.6	20.5	24.2	7.1	15.7	13.0	9.3
MEDIAN NIGHTS IN CALIFORNIA	7.0	6.0	7.0	9.0	6.0	6.0	5.0	10.0	5.0	8.0	8.0	6.0
SPENDING /VISITOR IN CA (est.)	\$1,165	\$861	\$959	\$913	\$986	\$1,066	\$1,661	\$847	\$1,072	\$1,240	\$1,261	\$707
TOTAL SPENDING IN CA (est.)	\$3,794 Mil	\$510 Mil	\$279 Mil	\$166 Mil	\$106 Mil	\$300 Mil	\$148 Mil	\$50 Mil	\$331 Mil	\$181 Mil	\$112 Mil	\$172 Mil

*Overseas visitors on exclusive tour packages were excluded.

**Caution - Small sample size.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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Table 39

EXPENDITURES
OVERSEAS AND MEXICAN LEISURE VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS*
(2008)

- Similar to the 2007 result, approximately 37% of overseas leisure visitors to California in 2008 did not visit any other state in the U.S. These California-only leisure visitors reported spending \$3,398 per capita on their entire trip, 5% more than the \$3,221 spent in 2007. Almost half of their total trip expenditures were in California (\$1,652).
- Average daily California expenses for California-only leisure visitors was \$102, up twenty percent from the \$85 per day reported in 2007.

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$3,398
(NUMBER OF RESPONDENTS)	(902)
INCLUSIVE TOUR PRICE	\$2,805
(NUMBER OF RESPONDENTS)	(136)
INTERNATIONAL AIRFARE	\$1,618
(NUMBER OF RESPONDENTS)	(1,137)
EXPENDITURE IN CALIFORNIA	\$1,652
PER DAY	\$102
(NUMBER OF RESPONDENTS)	(1,113)
<u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(1,113)
TRANSPORT IN U.S.	\$227
LODGING	\$354
FOOD, BEVERAGES	\$328
GIFTS, SOUVENIRS	\$373
ENTERTAINMENT	\$175
OTHER	\$168
<u>AVERAGE NIGHTS IN CALIFORNIA</u>	16.2

*Overseas visitors could report up to seven U.S. destinations.

Sources: U.S. Department of Commerce, ITA, Survey of International Air Travelers, 2008.
CIC Research, Inc., and the California Travel and Tourism Commission.

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APPENDIX A

SURVEY BACKGROUND

Introduction

This report on overseas visitors to California is based on data compiled from the Office of Travel & Tourism Industries (ITA – OTTI), Survey of International Air Travelers. The survey information is collected from passengers through questionnaires covering the traveler, the air trip, activities and places visited, and air travel expenditures.

The survey is conducted voluntarily by selected major airlines on a sample of their international flights departing from U.S. airports. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used to guide planning oriented toward the activities of international air travelers for both the public and private sectors.

Questionnaire Content

The survey questionnaire is designed to obtain responses from U.S. as well as non-U.S. residents. The questionnaire contains questions about the travelers (e.g., age, sex, family income, country and city of residence, previous travel experience, etc.). It also contains many basic questions about the current trip (e.g., type of air ticket, travel party composition, nights away from home, trip purpose, etc.).

The distinguishing features of this questionnaire are the complete trip itinerary and the trip expenditure data items. These items collect more complete data on these areas than are available elsewhere. Every major destination visited is covered, as is the length of stay and the type of accommodations utilized. Travel expenditures are also covered by type of expenditure. The entire questionnaire is reproduced in Appendix B.

Survey Operations

Data are collected monthly through in-flight passenger surveys conducted on a sample of the participating airlines' scheduled international flights that depart from United States airports during the seven days beginning with the third Monday of the month. Participating airlines receive advance listings of the flights to be surveyed, followed by a survey kit for each sample flight. The kits each contain instructions and questionnaires in the appropriate language. (The questionnaire is available in English, French, German, Italian, Japanese, Spanish, Korean and Chinese).

Airline cabin personnel distribute the self-administered questionnaires to all adult passengers and collect the completed forms prior to debarkation.

Sample Design

The sample is designed around the geographic detail desired for the resulting estimates and the specific airlines willing to participate in the survey. The design is a stratified, two-stage cluster sample, where scheduled flights are randomly selected from strata defined by airline and foreign destination in the first stage of the sample. When the survey is conducted on a selected flight, those passengers who respond are considered to represent all passengers on that flight.

Understanding the Estimates

Since airline participation is voluntary and changes from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travel.

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With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service. Passengers on charter flights and persons traveling by air between the U.S. and Canada are excluded.

The estimates are subject to a certain amount of error resulting from the sampling, data collection, and estimation processes. Because of the complicated nature of the sample design and the resulting computational burden, sampling variability has not been calculated for the estimates. Instead, an indication of the reliability of a set of related estimates is given by the number of respondents to the relevant questionnaire items. The reader must exercise judgment in determining the amount of confidence to place in an estimate and in its proper use. For example, an estimate based on 500 respondents is more reliable than one based on 200 respondents. Several kinds of estimates appear in the tables. The majority are in the form of percent distributions of the responses to questionnaire items. Distributions for items allowing only one choice of response will total to 100 percent. Those allowing more than one choice may total to more than 100 percent. Where the symbol "--" appears, this means that no or limited data is available for that response.

In addition to estimates of percents, estimates of means and medians are shown for travel party size, age, annual family income, number of nights stayed and by type of accommodations.

Definitions

Notes of explanation for selected variables appearing in the row headings of the tables are given below.

Residence of Visitors: In the overseas tables the major traffic-generating countries are listed by world regions, as described in Appendix C. Countries not listed are combined by region into the "Other Region X" categories.

Type and Size of Travel Party: A travel party can fall into only one of these categories: traveling alone; family group; business group; and mixed business, family, and other. These four categories total 100 percent. A party is classified as mixed if the party is a combination of two or more of the other categories. Mean and median party size are computed from the distribution of frequencies of parties of different sizes (for example, three passengers traveling together are counted as a single party in the frequency distribution from which mean and median party size are computed).

Air Expenditures: The amounts shown for mean international airfare and mean expenditures while in the United States on this trip are those amounts spent over and above any inclusive tour expenditures paid prior to beginning the trip. The categories are mutually exclusive.

Mean: The mean is the sum of all responses divided by the number of responses.

Median: The median is that value for which 50 percent of the values lie below it and 50 percent are above it.

Leisure Visitors: Are defined as those visitors whose main purpose of trip is vacation/holidays or visiting friends/relatives.

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**APPENDIX B
QUESTIONNAIRE**

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**UNITED STATES DEPARTMENT OF COMMERCE
United States International Trade Administration**

**SURVEY OF
INTERNATIONAL
AIR TRAVELERS**

DEPARTING THE UNITED STATES

Dear International Traveler:

Please help the travel industry improve the services they offer you. The information collected in this survey is used by airlines, travel agents, hotels, government travel offices, and other travel planners and providers to understand you, the international traveler, and thereby take steps to improve your next international trip.

This questionnaire is designed to be completed by both non-U.S. residents who have visited the country and U.S. residents traveling abroad. If you are 18 years of age or older, please complete this voluntary survey. **ONLY ONE RESPONSE PER FAMILY GROUP, PLEASE.**

Upon completing this survey, please return it to the person who provided it to you. The estimated average time to complete this questionnaire is 15 minutes. Should you have any comments regarding this survey, please send them to Tourism Industries, ITA, Washington DC 20230, or Office of Information and Regulatory Affairs, OMB, Project 0605-0007, Washington, DC 20503.

Thank you for your cooperation on this important survey.

This survey also available in Japanese, French, German, Spanish, Chinese, Korean, Polish, Portuguese, Russian, Italian.

OMB CLEARANCE NO. 0605-0007

ONLY ONE RESPONSE PER FAMILY, PLEASE

- 1a. Date
- b. Name of Airline
- c. Flight Number

d. Please rate your general impression of this airline.

Mark (X) ONE

- Excellent
- Good
- Average
- Fair
- Poor

2a. What are your City, State, ZIP (postal) Code, and Country of Residence? - Specify

NON-US Residents – Skip to question 2c

b. If this flight is part of an outbound journey from your home, what will be the main destination on your trip? - Specify

c. For NON-US Residents ONLY
If this flight is part of the return journey to your home, what was the main destination that you visited since you left home? – Specify

3a. What is your country of CITIZENSHIP? – Specify

b. What is your country of BIRTH?

US Residents – SKIP to question 4b

4a. For Non-US Residents ONLY
At what city or airport did you pass through U.S. Customs/Immigration? – Specify

Non-US Residents – SKIP to question 5a

4b. If you are a US resident, at what city or airport will you pass through U.S. Customs/immigration when

you return?

--- Specify

5a. At what airport did or will you board this aircraft today?

--- Specify

b. Did you make a connecting flight?

- No
- Yes – From which airport? – Specify

c. At which airport will you leave this aircraft? – Specify

d. Once there, are you making a connecting flight?

- No
- Yes – To which City? --Specify

6. How did you obtain information used to plan your trip?

- Mark (X) ALL that apply
- Airlines directly
 - In-flight information systems
 - National government tourist office
 - State/City travel office
 - Friends or relatives
 - Travel agency
 - Travel guides
 - Tour company
 - Corporate travel department
 - Newspaper/Magazine
 - TV/Radio
 - Personal computer

7. How long before you departed on this trip did you –

Decide to travel?

Make airline reservation?

8. How were your AIRLINE reservations for this trip made?

Mark (X) ONE

- A travel agent
- Travel club
- The Airline directly
- The company's travel department
- Tour operator
- Personal computer
- Don't know
- Other

9a. Were commercial **LODGING** reservations made for this trip before you left home?

Mark (X) ONE

- Yes – Go to question 9b
- No – SKIP to question 10a

b. These reservations were made through.....

Mark (X) ALL that apply

- A travel agent
- The hotel/motel staff directly
- The company's travel department
- A tour operator
- Airline staff
- A friend or relative
- Business associate
- Other

10a. What is/was the **MAIN** purpose of your trip?

Mark (X) ONE

- Business/Professional
- Convention/Conference/Trade show
- Leisure/Recreation/Holidays/Sightseeing
- Visit friends/Relatives
- Government affairs/Military
- Study/Teaching
- Religion/Pilgrimages
- Health treatment
- Other – Specify --

10b. Does this trip have any other purposes?

Mark (X) ALL that apply

- Business/Professional
- Convention/Conference/Trade show
- Leisure/Recreation/Holidays/Sightseeing
- Visit friends/Relatives
- Government affairs/Military
- Study/Teaching
- Religion/Pilgrimages
- Health treatment
- Other – Specify --

11. With whom are you traveling now?

Mark (X) ALL that apply

- Spouse
- Family/Relatives
- Business associate(s)
- Friend(s)
- Tour group
- Traveling alone

12. **Altogether, how many adults and/or children are in your travel party?** Exclude your tour group members unless you knew them and planned to travel with them prior to booking the tour.

Number of adults

Number of children

Under 18 years old

13. How many nights away from home will you spend or have you spent on this trip?

Number of nights in the USA
(including U.S. territories)

Number of nights outside the USA

CONTINUE WITH QUESTION 10B

14. **IN ORDER OF VISIT, list the principal places visited or to be visited on this trip. and indicate the number of nights at each place.** Under number nights, if you did not or will not stay overnight at a place visited, enter "0". Under the section for type of lodging, indicate the lodging company name, or check the appropriate space

Destinations (Cities/Attractions) <i>Enter ONLY ONE destination per line</i>	State or Country	Number of Nights	Type of Lodging <i>Select ONE per line</i>		
			Hotel/Motel Specify name of company	<i>Mark (X)</i>	
				Private Home	Other
1.					
2.					
3.					
4.					
5.					
6.					
7.					

15a. **Is this trip part of a package?** Mark (X) ONE

No --- SKIP to question 16

Yes --- **Which of the following does your package include?**

Mark (X) ALL that apply

- Airfare
- Rental car
- Tour escort for entire trip
- Cruise
- Intercity bus/Coach transportation
- Commercial guided tours
- Commercial lodging – **How many nights lodging are included?**

b. **How many days prior to departure was this package booked?**
---Specify

c. **What is the approximate cost of your prepaid package?**
Please give your answer in U.S. dollars or your own country's currency.

IF OTHER THAN U.S. CURRENCY
Specify country of currency used.

16. **About your trip expenditures... please estimate the amount of money spent, or expected to be spent for the following items.** Please remember your name is not on this form. Your cooperation in completing this important question is appreciated.

a. **Please estimate how much money you spent, or will spend, outside your own country.** Do not include those items which were covered in the package mentioned in 15c above. --- Specify

b. **Country of currency used for estimate** ---Specify

c. **How many people are covered by this expenditure estimate?**
Specify total number of people.

d. **What was the total cost of your international air travel tickets?** –
Specify
 Mark (X) here if you do NOT know cost of tickets.

e. **Are these ONE WAY tickets?**
Mark (X) ONE
 Yes
 No

f. **How much did you spend at the airport of your USA departure?** –
Specify

U.S. Residents – SKIP to question 17.

For Non-U.S. Residents ONLY

g. Of the total expenditure given in 16a,
Please estimate how much was spent in the USA. --- Specify

h. Of the total expenditure given in 16g above, **please estimate how much was for---**

1. **Transportation**

2. **Lodging**

3. **Foods and beverages**

4. **Gifts, souvenirs and other purchases**

5. **Entertainment and recreation**

6. **Other spending (if any)**

17. Please tell us about how you did, or will, pay for your expenses on this trip--

Type of payment	Percentage paid For expenses	Company(ies) of issue
Credit card(s)	%	
Travelers check(s)	%	
Debit card(s)	%	
Cash	%	
TOTAL	100%	

18. What types of transportation did you, or will you, use when reaching your destination on this trip?

Mark (X) ALL that apply

- Airlines within the USA
- Airlines outside the USA
- Railroad between cities
- Rented auto --- Specify company name

- Taxi/Cab/Limousine
- City subway/Tram/Bus
- Bus between cities
- Company or private auto
- Motor home/Camper

19. Which of the following leisure activities did you, or will you, spend time on during this trip?

Mark (X) ALL that apply

- Shopping
- Dining in restaurants
- Amusement/Theme parks
- Visiting historical places
- Visiting casinos/Gambling
- Commercial guided tours
- Visiting small towns and villages
- Cultural heritage sights/Activities
- Touring the countryside
- Water sports/Sunbathing
- Ranch vacations
- Cruises
- Hunting/Fishing
- Snow skiing
- Golfing/Tennis
- Environmental/Ecological excursions
- Visiting national parks
- Visiting American Indian communities
- Attending sports event
- Concert/Play/Musical
- Art gallery/Museum
- Sightseeing in cities
- Nightclubs/Dancing
- Ethnic heritage sights/Activities

20. Please rate this airline for this trip on each of the following attributes.

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Convenient schedule 0 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	
b. Ticket price	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Reservation service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Check-in waiting time	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Check-in personnel	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Airline club/lounge	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. On-time departure	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. Food/Beverage quality	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Flight attendant service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Audio/Video	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
k. Cabin cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
l. Cabin noise level	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
m. Seat comfort	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
n. Cabin layout	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
o. Carry-on storage space	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
p. Overall evaluation of aircraft	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
q. Overall evaluation of flight	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

21. Would you choose or recommend this airline for your next trip on this route?

Mark (X) ONE

- Definitely would
- Probably would
- Probably would not
- Definitely would not
- Not sure

22. What were your three main reasons for flying on THIS AIRLINE? Indicate by marking "1" for the most important reasons, "2" for the next most important reason, and "3" for the third most important reason. DO NOT indicate more than three reasons.

<input type="checkbox"/>	Airfare	<input type="checkbox"/>	On-time reputation
<input type="checkbox"/>	Convenient schedule	<input type="checkbox"/>	Previous good experience
<input type="checkbox"/>	Non-stop flights	<input type="checkbox"/>	Mileage bonus/Frequent flyer program
<input type="checkbox"/>	Employer policy	<input type="checkbox"/>	In-flight service reputation
<input type="checkbox"/>	Safety reputation	<input type="checkbox"/>	Not involved in choice of carrier
<input type="checkbox"/>	Loyalty to carrier	<input type="checkbox"/>	Other ----- Specify

23a. Where are you sitting today?

Mark (X) ONE

- First class
- Executive/Business class
- Economy/Tourist/Coach

b. What type of airline ticket do you have?

Mark (X) ALL that apply

- First class
- Executive/Business class
- Economy/Tourist/Coach
- Frequent flyer free ticket
- Frequent flyer upgrade
- Discount/Group fare
- Non-revenue
- Don't know

24. Please rate the following attributes of the AIRPORT from which you have just departed (or are currently waiting to depart) the United States.

Mark (X) ONE rating for each

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Airport access	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
b. Ground transportation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Airport terminal convenience	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Airport terminal cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Concession goods/Services	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Concession prices	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. Terminal seating availability	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. International Traveler facilities	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Security measures	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Overall airport evaluation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

U.S. residents --- SKIP to question 26a

25 a. For Non-U.S. Residents Only:

When entering the USA, please rate your Immigration and Naturalization Service/Passport Control and U.S. Customs experience at the airport where you entered the USA.

Mark (X) ONE rating for each

	Excellent	Good	Average	Fair	Poor	
Don't Know						
a. Passport Control						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0
b. Customs baggage clearance						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0

b. About how long did it take you to clear Passport Control and Customs when entering the United States?

Specify in minutes

Baggage delivery waiting time

Mark (X) ONE rating

- Excellent
- Good
- Average
- Fair
- Poor
- Don't know

26a. Did you have personal safety concerns before you started your international trip?

Mark (X) ONE

- Yes
- No

b. Did your concerns cause you to change your travel plans?

Mark (X) ONE

- Yes
- No

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26c. For Non-U.S. Residents ONLY

Was your personal safety actually endangered while in the USA?

Mark (X) ONE

No – Go to question 27

Yes – Indicate the city(ies) where incidents(s) took place and mark (X) the appropriate category(ies) below.

City	Incidents – Mark (X)					
	Harassment/ Arguments	Assault/ Physical Harm	Burglary/ Theft	Transpor- tation accident	Health Problem	Other -- Specify

27a. Is this your first trip by air to/from the United States?

Mark (X) ONE

Yes – SKIP to question 28

No – Go to question 27b

b. Altogether, how many round trips by air have you made to/from the United States ---

In the past 12 months?

In the past 5 years?

28. Please give us some information about yourself.

a. What is your occupation?

Mark (X) ONE

Manager/Executive

Professional/Technical

Clerical/Sales

Craftsman/Mechanic/Factory worker

Government/Military

Homemaker/

Retired

Student

Other -- Specify

b. Age

c. Gender ---Mark (X) ONE

Female

Male

29. What is the total combined yearly income of all members of your household? Give your answer either in USA dollars or in your own country's currency. Please specify the country of currency if NOT USA dollars.

In USA dollars ---

OR

In currency other than USA dollars –

Specify

Mark (X) ONE

Under \$20,000

\$20,000 - \$39,999

\$40,000 - \$59,999

\$60,000 - \$79,999

\$80,000 - \$99,999

\$100,000 – \$119,999

\$120,000 – \$139,999

\$140,000 -- \$159,999

\$160,000 -- \$179,999

\$180,000 -- \$199,999

\$200,000 and above

Total annual household income

Country of currency

**THANK YOU FOR COMPLETING THIS QUESTIONNAIRE.
WE HOPE YOUR TRIP WAS OR WILL BE AN ENJOYABLE ONE.**

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APPENDIX C

WORLD BY REGION AND COUNTRY OR TERRITORY

Mexico

Mexico City
Guadalajara
Monterey
Acapulco
Other Mexico

Central America

Belize
Costa Rica
El Salvador
Guatemala
Honduras
Nicaragua
Panama Republic
San Andres Island

South America

Argentina
Bolivia
Brazil
Chile
Columbia
Ecuador
French Guiana
Guyana
Paraguay
Peru
Surinam
Uruguay
Venezuela

Caribbean

Anguilla Island
Antigua
Bahama Island
Barbados
Bermuda
Cuba
Dominica
Dominican Republic
Grand Cayman
Grenada
Guadeloupe
Haiti
Jamaica
Martinique
Montserrat Island
Neth. Antilles
Nevis
Providential Islands
St. Barthelemy
St. Kitts
St. Lucia
St. Vincent
Trinidad/Tobago
Turks/Calcos
Virgin Islands/UK

Europe

Austria
Belgium
Bosnia-Herzegovina
Bulgaria
Byelarus (Belarus)
Croatia
Czech Republic
Denmark
Finland
France
Georgia
Germany
Greece
Holy See
Hungary
Iceland
Ireland
Italy
Kazakhstan
Kyrgyzstan
Lithuania
Luxembourg
Malta
Netherlands
Norway
Poland
Portugal
Romania
Russia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Tajikistan
Turkmenistan
Ukraine
United Kingdom
Uzbekistan
Yugoslavia

Africa

Algeria
Cameroon
Canary Islands
Cape Verde Island
Ethiopia
Gabon
Ghana
Guinea
Ivory Coast
Kenya
Liberia
Morocco
Nigeria
SW Africa/S. Africa
Senegal
Tanzania
Togo
Tunisia
Zambia
Zimbabwe

Middle East

Egypt
Bahrain
Cyprus
Iran
Iraq
Israel
Jordan
Kuwait
Lebanon
Qatar
Saudi Arabia
Syria
Turkey
United Arab Emirates

Far East

Bangladesh
Brunei
China/Mainland
China/Taiwan
Hong Kong
India
Indonesia
Japan
Korea-South
Malaysia
Okinawa/Ry Island
Pakistan
Philippines
Singapore
Thailand

Oceania

Australia
Cook Islands
Fiji Islands
French Polynesia
Kiribati
Micronesia
Nauru Republic
New Zealand
Papua/New Guinea
Tonga

