

## CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2013

Germany was California's fifth largest overseas market with approximately 421,000 visitors to California in 2013. Collectively visitors from Germany spent approximately \$703 million in California.

German visitors to California during 2013 reported spending \$148 per day during an 11.3 night average stay or approximately \$1,670 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

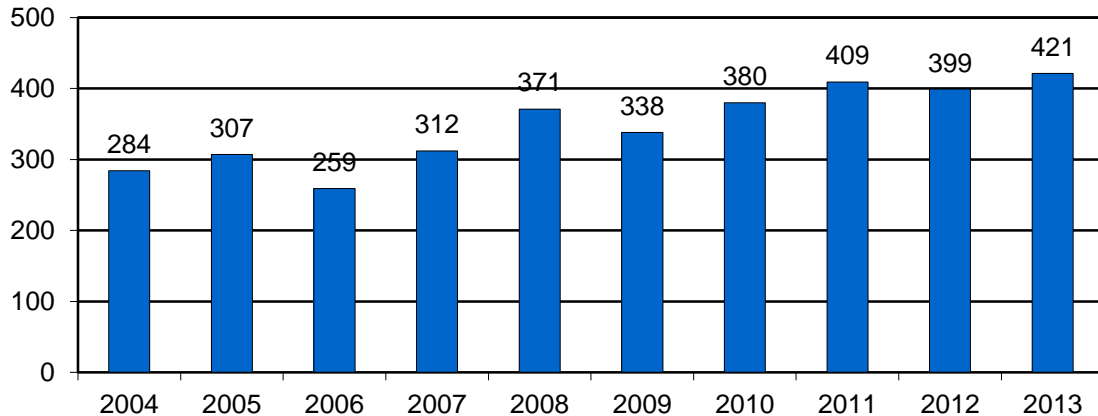
### Visitors from Germany

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2003	1,180,212	21.1%	249,000
2004	1,319,904	21.5%	284,000
2005	1,415,530	21.7%	307,000
2006	1,385,520	18.7%	259,000
2007	1,524,151	20.5%	312,000
2008	1,782,229	20.8%	371,000
2009	1,686,825	20.0%	338,000
2010	1,726,193	22.0%	380,000
2011	1,823,797	22.4%	409,000
2012	1,875,952	21.3%	399,000
2013	1,916,471	22.0%	421,000

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

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

### Number of Visitors from Germany to CA, 2004-2013 (in 000s)



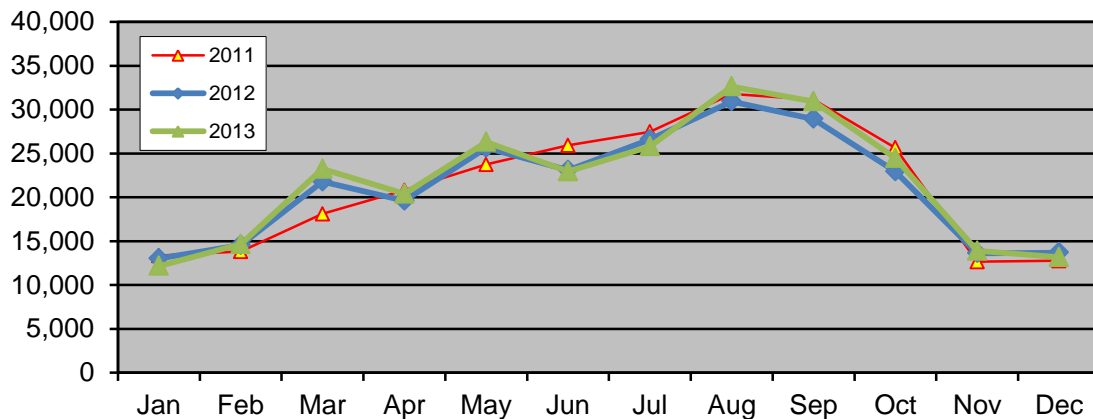
Source: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers.

The volume of visitors to California from Germany was consistently near or above 500,000 per year throughout the 1990s. However, the number of German visitors dropped precipitously in 2000 and continued to drop following the 9-11 terrorist attacks to a low of 243,000 visitors in 2002. Since then, there has been growth in the number of visitors from Germany with the exception of a drop in 2006 and in 2009. Visitation to California from Germany rose in 2013 to a 10-year high of 421,000, up from the previous year (399,000).

## German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were similar during most of 2013 as in 2012 & 2011. The volume of German residents arriving at California ports-of-entry peaked in August and September. The lowest volumes of German arrivals were recorded in the winter months of November, December, and January.

**Residents of Germany  
Monthly Port of Entry Arrivals to CA  
2011-2013**



Source: U.S. Department of Homeland Security, I-94 International Arrival Records.  
CIC Research, Inc.

## Comparisons with Overseas Visitors

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

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

- Make use of an online travel agency when planning their trip
- Have longer trip planning and advance airline booking horizons
- Visit San Francisco while in the U.S.
- Visit national parks/monuments, small towns/countryside, and historical locations
- Make use of a rental vehicle and city subway/tram/bus for transportation while in the U.S.
- Use credit cards to make purchases while in the U.S.
- Work in a service occupation

Conversely, visitors from Germany are less likely to:

- Use a taxicab/limousine for transportation while in the U.S.
- Spend their money on gifts/souvenirs in the U.S.
- Use cash from home or travelers checks to make purchases while in the U.S.

### Characteristics of Travelers from Germany to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Germany (n = 462)	Leisure Visitors from Germany (n = 313)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	52%	57%	78%
Visit Friends/Relatives	17%	17%	22%
Business	15%	11%	-
Convention/Conference	9%	7%	-
Other Purpose	8%	9%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	64%	72%	88%
Visit Friends/Relatives	32%	35%	38%
Business	20%	13%	1%
Convention/Conference	12%	8%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	37%	38%
Online Travel Agency	31%	41%	43%
Travel Agency Office	26%	30%	34%
Personal Recommendation	26%	26%	31%
Travel Guide	15%	21%	26%
Corporate Travel Department	14%	14%	7%
Tour Operator/Travel Club	9%	7%	10%
National/State/City Travel Office	8%	6%	8%
<b>Advance Planning for Trip</b>			
7 days or less	5%	5%	3%
8 - 30 days	27%	14%	9%
31 - 60 days	17%	10%	9%
61 - 90 days	14%	19%	22%
More than 3 Months	36%	52%	58%
Total	100%	100%	100%
Average Planning Time in Days	105 days	140 days	153 days
<b>Advance Airline Reservations</b>			
7 days or less	10%	8%	4%
8 - 30 days	35%	18%	12%
31 - 60 days	17%	15%	14%
61 - 90 days	13%	19%	20%
91 - 120 days	8%	12%	15%
121 - 180 days	9%	14%	18%
6 Months or More	7%	15%	18%
Total	100%	100%	100%
Average Booking in Days	72 days	104 days	122 days

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

\*\* Multiple response question. The column may sum to more than 100%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Germany to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Germany (n = 462)	Leisure Visitors from Germany (n = 313)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	31%	33%	37%
Airlines Directly	28%	22%	24%
Internet Booking Service	24%	30%	31%
Corporate Travel Department	15%	13%	5%
Tour Operator/Travel Club	9%	6%	8%
Other	2%	<1%	<1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	37%	42%
Non-Stop Flights	17%	21%	22%
Convenient Schedule	15%	9%	6%
Mileage Bonus/Frequent Flyer Program	9%	5%	5%
Previous Good Experience	9%	10%	8%
Safety Reputation	6%	10%	10%
Loyalty to Carrier	4%	3%	3%
Employer policy	3%	2%	1%
In-flight Service Reputation	3%	<1%	<1%
On-time Reputation	2%	-	-
Other	4%	4%	4%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	79%	88%	89%
Executive/Business	10%	10%	8%
Premium Economy	10%	2%	3%
First Class	1%	<1%	1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	10%	13%
No	85%	90%	87%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	7%	4%	5%
Bus/Coach	7%	3%	4%
Guided Tours	6%	3%	3%
Meals	6%	3%	3%
Rental Car	5%	4%	5%
Tour Guide for Entire Trip	4%	3%	5%
Airfare and Accommodation Only	3%	2%	3%
Cruise	2%	<1%	<1%
Recreation	1%	-	<1%

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

\*\* Multiple response question. Travel package must include airfare and accommodation and may include others.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Germany to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Germany (n = 462)	Leisure Visitors from Germany (n = 313)
<b>Travel Companions**</b>			
Traveling Alone	61%	59%	40%
Spouse/Partner	21%	25%	39%
Family/Relatives	13%	10%	15%
Friends	6%	9%	13%
Business Associates	4%	2%	-
Tour Group	1%	1%	1%
<b>Average Travel Party Size</b>	1.6	1.5	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	71%	69%
Private Home	27%	31%	28%
Other	6%	12%	15%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.5 nights	26.4 nights	19.2 nights
Mean Nights in California	12.2 nights	11.3 nights	9.7 nights
% of California Nights	54%	43%	51%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	25%	27%
Average Trips to the U.S. in Past Year	1.7 trips	1.9 trips	1.7 trips
<b>Average Number of States Visited</b>	2.0 states	2.3 states	2.5 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	3.7 dest.	4.2 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	59%	51%	58%
San Francisco	47%	57%	61%
Las Vegas	30%	37%	46%
New York City	16%	14%	16%
San Diego	13%	17%	18%
Anaheim-Santa Ana	8%	5%	5%
Flagstaff-Grand Canyon-Sedona	7%	14%	19%
San Jose	6%	7%	4%
DC Metro Area	4%	4%	5%
Monterey-Salinas	4%	6%	6%
Oahu	4%	3%	3%
Santa Barbara	3%	3%	4%
Riverside/San Bernardino	3%	7%	8%
Chicago	3%	4%	3%
Seattle	3%	3%	3%
Sacramento	3%	4%	5%
Miami	3%	1%	1%

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**Characteristics of Travelers from Germany to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Germany (n = 462)	Leisure Visitors from Germany (n = 313)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	90%	94%
Sightseeing	84%	88%	91%
National Parks/Monuments	49%	60%	71%
Experience Fine Dining	43%	36%	35%
Small Towns/Countryside	41%	59%	67%
Amusement/Theme Parks	38%	31%	34%
Historical Locations	37%	53%	60%
Guided Tours	33%	32%	34%
Art Gallery/Museums	30%	30%	32%
Casino/Gamble	25%	27%	30%
Cultural/Ethnic Heritage Sites	21%	26%	29%
Concert/Play/Musical	20%	21%	22%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	46%	44%	42%
Rented Auto	43%	63%	68%
Auto, Private or Company	37%	30%	26%
City Subway/Tram/Bus	33%	42%	44%
Taxicab/Limousine	33%	24%	16%
Bus between Cities	18%	14%	14%
Ferry/River Taxi/Srt. Scenic Cruise	12%	14%	15%
Railroad between Cities	8%	8%	8%
Rented Bicycle/Motorcycle/Moped	5%	5%	7%
Cruise Ship/River Boat 1+ Nights	4%	2%	2%
Motor Home/Camper	2%	6%	8%
<b>Visitor Spending in the U.S.***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$3,902	\$2,978
Per Visitor Per Day (CA)	\$159	\$148	\$155
Per Visitor/Trip (California)	\$1,940	\$1,670	\$1,504
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	29.1%	33.2%	26.1%
Air Transportation in the U.S.	6.9%	6.0%	4.2%
Entertainment	12.2%	13.7%	16.0%
Food/Beverages	17.8%	21.3%	23.6%
Gifts/Souvenirs	21.9%	13.9%	18.3%
Ground Transportation in the U.S.	5.6%	6.6%	8.5%
Other	6.3%	4.8%	3.2%

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\*\* Multiple response question. The column may sum to more than 100%.

\*\*\* Spending estimates were based on the SIAT data and revised by Tourism Economics for Visit California.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers." CIC Research, Inc. and Tourism Economics

**Characteristics of Travelers from Germany to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Germany (n = 462)	Leisure Visitors from Germany (n = 313)
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	54%	54%
Cash from Home/Travelers Checks	26%	15%	18%
Cash Adv./Withdrawal Using Credit Card	18%	23%	22%
Cash Adv./Withdrawal Using Debit Card	7%	4%	4%
Purchases Using Debit Card	6%	3%	2%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	42 years	41 years	44 years
Average Age - Females	39 years	36 years	38 years
<b>Occupation</b>			
Mgmt., Business, Science, & Arts	44%	36%	28%
Service Occupations	11%	22%	27%
Student	11%	15%	14%
Sales and Office	10%	9%	10%
Retired	8%	6%	9%
Homemaker	5%	2%	3%
Prod., Trans., & Material Moving	4%	3%	3%
Military/Government	4%	3%	3%
Nat. Res., Const., & Maintenance	3%	1%	1%
Other	2%	1%	1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	15%	13%
\$20,000 - \$39,999	14%	10%	13%
\$40,000 - \$59,999	14%	14%	18%
\$60,000 - \$79,999	12%	9%	11%
\$80,000 - \$99,999	10%	11%	9%
\$100,000 - \$119,999	8%	6%	6%
\$120,000 - \$139,999	6%	8%	8%
\$140,000 - \$159,999	5%	4%	5%
\$160,000 - \$179,999	3%	5%	3%
\$180,000 - \$199,999	3%	4%	4%
\$200,000 and over	12%	14%	10%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$104,007	\$95,533

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Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."