

CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2014

Germany was California's sixth largest overseas market with approximately 439,000 visitors to California in 2014. Collectively visitors from Germany spent approximately \$720 million in California.

German visitors to California during 2014 reported spending \$133 per day during a 12.3 night average stay or approximately \$1,641 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

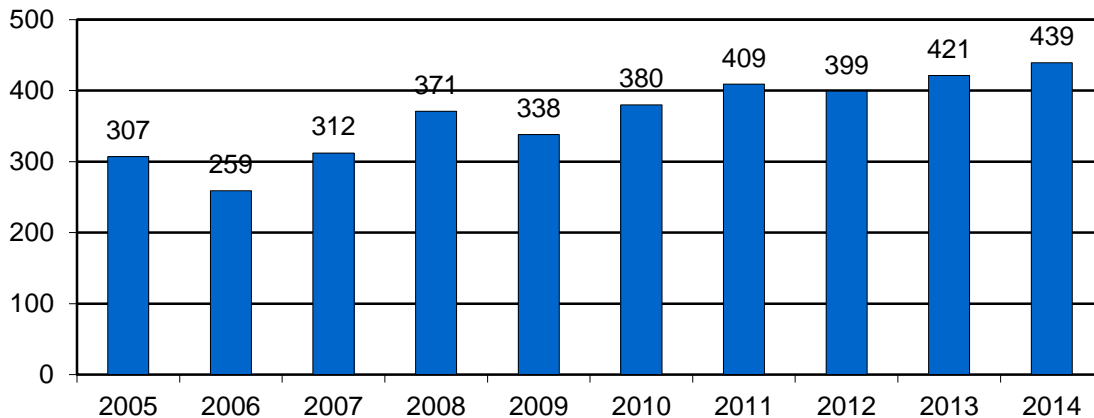
Visitors from Germany

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2014	1,968,536	22.3%	439,000

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, 2005-2014 (in 000s)



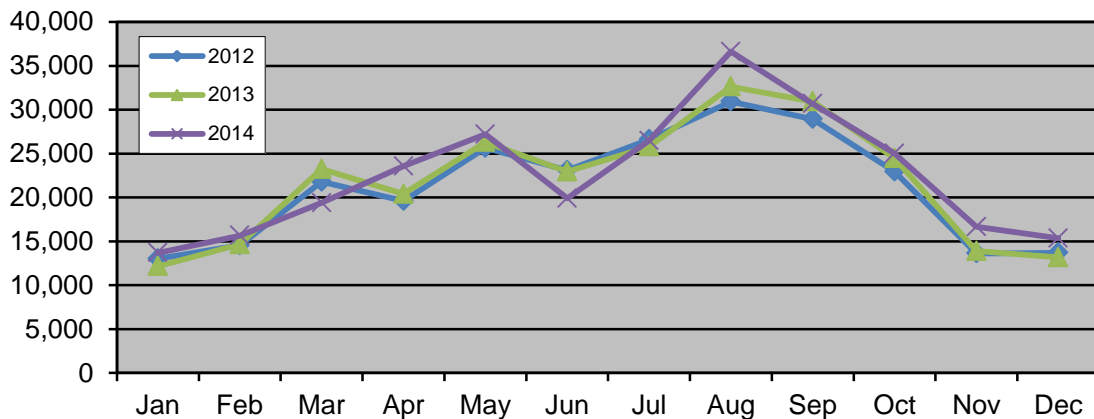
Source: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers.
Revised by Tourism Economics for Visit California (October, 2015).

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 2014 to a 15-year high of 439,000, up from the previous year (421,000).

German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were similar during most of 2014 as in 2013 & 2012. 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
2012-2014**



Sources: U.S. Department of Homeland Security, I-94 International Arrival Records, CIC Research, Inc., Visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

Comparisons with Overseas Visitors

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

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

- Travel to the U.S. for the purpose of vacation/holidays
- Make use of online travel agencies or travel guides when planning their trip
- Have longer trip planning and advance airline booking horizons
- Travel with a spouse/partner
- Spend more nights in the U.S.
- Visit San Francisco while in the U.S.
- Visit national parks/monuments, small towns/countryside, and historical locations while in the U.S.
- Make use of a rental vehicle and city subway/tram/bus for transportation while in the U.S.
- Spend their money on accommodation in the U.S.
- Use credit cards to make purchases while in the U.S.

Conversely, visitors from Germany are less likely to:

- Travel alone
- Use a private or company auto 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, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Germany (n = 524)	Leisure Visitors from Germany (n = 411)
Primary Purpose of Trip			
Vacation/Holidays	54%	68%	86%
Visit Friends/Relatives	18%	11%	14%
Business	13%	8%	-
Convention/Conference	8%	7%	-
Other Purpose	7%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	78%	92%
Visit Friends/Relatives	34%	30%	31%
Business	18%	13%	2%
Convention/Conference	12%	9%	-
Sources Used to Plan Trip**			
Airline	43%	38%	38%
Online Travel Agency	32%	42%	48%
Travel Agency Office	25%	31%	30%
Personal Recommendation	29%	31%	35%
Travel Guide	15%	30%	34%
Corporate Travel Department	12%	13%	9%
Tour Operator/Travel Club	10%	8%	8%
National/State/City Travel Office	8%	12%	11%
Advance Planning for Trip			
7 days or less	5%	2%	1%
8 - 30 days	25%	12%	7%
31 - 60 days	19%	15%	14%
61 - 90 days	15%	13%	13%
More than 3 Months	36%	58%	64%
Total	100%	100%	100%
Average Planning Time in Days	106 days	138 days	153 days
Advance Airline Reservations			
7 days or less	9%	6%	4%
8 - 30 days	35%	16%	12%
31 - 60 days	19%	20%	17%
61 - 90 days	12%	15%	16%
91 - 120 days	8%	12%	13%
121 - 180 days	10%	16%	20%
6 Months or More	8%	16%	18%
Total	100%	100%	100%
Average Booking in Days	74 days	105 days	118 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Germany (n = 524)	Leisure Visitors from Germany (n = 411)
Means of Booking Air Trip**			
Travel Agency Office	29%	32%	32%
Airlines Directly	29%	28%	30%
Internet Booking Service	27%	28%	33%
Corporate Travel Department	12%	13%	6%
Tour Operator/Travel Club	10%	5%	6%
Other	1%	1%	1%
Main Factor in Selecting Airline			
Airfare	31%	35%	40%
Non-Stop Flights	19%	23%	22%
Convenient Schedule	14%	16%	13%
Previous Good Experience	8%	5%	4%
Mileage Bonus/Frequent Flyer Program	6%	3%	3%
Safety Reputation	6%	8%	8%
Loyalty to Carrier	3%	3%	4%
In-flight Service Reputation	3%	1%	1%
Employer policy	2%	1%	-
On-time Reputation	2%	1%	-
Other	5%	4%	5%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	83%	85%
Premium Economy	9%	3%	3%
Executive/Business	8%	13%	12%
First Class	1%	<1%	<1%
Total	100%	100%	100%
Use of Package			
Yes	15%	10%	12%
No	85%	90%	88%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	4%	4%
Bus/Coach	6%	5%	6%
Guided Tours	6%	2%	2%
Meals	6%	4%	5%
Rental Car	5%	5%	6%
Tour Guide for Entire Trip	4%	4%	4%
Airfare and Accommodation Only	2%	1%	1%
Cruise	2%	1%	1%
Recreation	2%	2%	2%

* 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Germany (n = 524)	Leisure Visitors from Germany (n = 411)
Travel Companions**			
Traveling Alone	59%	51%	32%
Spouse/Partner	22%	32%	48%
Family/Relatives	15%	13%	18%
Friends	6%	6%	9%
Business Associates	3%	2%	<1%
Tour Group	1%	1%	1%
Average Travel Party Size	1.7	1.7	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	80%	79%
Private Home	30%	30%	32%
Other	6%	5%	6%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	27.0 nights	25.7 nights
Mean Nights in California	12.2 nights	12.3 nights	12.2 nights
% of California Nights	52%	46%	46%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	26%	29%
Average Trips to the U.S. in Past Year	1.7 trips	1.9 trips	1.7 trips
Average Number of States Visited	2.1 states	2.4 states	2.5 states
Average Number of Destinations Visited	3.1 dest.	4.0 dest.	4.4 dest.
Places Visited in the U.S.**			
Los Angeles	62%	59%	64%
San Francisco	44%	57%	62%
Las Vegas	29%	37%	44%
New York City	16%	11%	11%
San Diego	14%	17%	18%
Anaheim-Santa Ana	8%	4%	4%
Flagstaff-Grand Canyon-Sedona	7%	15%	19%
San Jose	6%	5%	2%
Monterey-Salinas	5%	6%	7%
DC Metro Area	4%	5%	5%
Riverside/San Bernardino	4%	7%	8%
Santa Barbara	4%	7%	8%
Chicago	3%	3%	2%
Oahu	3%	4%	5%
Seattle	3%	4%	5%
Sacramento	3%	5%	5%
Miami	3%	4%	3%

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**Characteristics of Travelers from Germany to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Germany (n = 524)	Leisure Visitors from Germany (n = 411)
Activities Experienced While in the U.S.**			
Shopping	89%	89%	89%
Sightseeing	83%	87%	91%
National Parks/Monuments	52%	69%	74%
Small Towns/Countryside	44%	62%	65%
Experience Fine Dining	43%	35%	36%
Amusement/Theme Parks	40%	33%	37%
Historical Locations	35%	54%	56%
Guided Tours	33%	36%	40%
Art Gallery/Museums	31%	27%	26%
Casino/Gamble	24%	28%	30%
Concert/Play/Musical	21%	18%	17%
Cultural/Ethnic Heritage Sites	20%	28%	29%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	43%	41%
Rented Auto	44%	64%	65%
Auto, Private or Company	38%	28%	24%
City Subway/Tram/Bus	31%	40%	42%
Taxicab/Limousine	31%	25%	22%
Bus between Cities	19%	17%	17%
Ferry/River Taxi/Srt. Scenic Cruise	10%	13%	14%
Railroad between Cities	7%	8%	8%
Rented Bicycle/Motorcycle/Moped	5%	6%	5%
Cruise Ship/River Boat 1+ Nights	4%	5%	6%
Motor Home/Camper	2%	4%	5%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$3,335	\$3,264
Per Visitor Per Day (CA)	\$153	\$133	\$137
Per Visitor/Trip (California)	\$1,872	\$1,641	\$1,673
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	38.2%	38.5%
Air Transportation in the U.S.	6.6%	4.3%	4.5%
Entertainment	12.5%	11.3%	11.1%
Food/Beverages	18.1%	22.4%	24.1%
Gifts/Souvenirs	21.1%	13.7%	12.6%
Ground Transportation in the U.S.	6.2%	5.4%	4.9%
Other	4.9%	3.7%	4.2%

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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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Germany (n = 524)	Leisure Visitors from Germany (n = 411)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	56%	54%
Cash from Home/Travelers Checks	27%	12%	15%
Cash Adv./Withdrawal Using Credit Card	18%	25%	25%
Cash Adv./Withdrawal Using Debit Card	6%	4%	4%
Purchases Using Debit Card	6%	2%	2%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	40 years	40 years
Average Age - Females	38 years	38 years	39 years
Occupation			
Mgmt., Business, Science & Arts	44%	41%	35%
Service Occupations	11%	11%	13%
Student	11%	14%	12%
Sales and Office	11%	12%	13%
Retired	8%	7%	9%
Homemaker	4%	3%	3%
Prod., Trans., & Material Moving	4%	6%	6%
Nat. Res., Const., & Maintenance	3%	2%	2%
Military/Government	2%	2%	2%
Other	2%	4%	4%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	14%	15%
\$20,000 - \$39,999	13%	8%	10%
\$40,000 - \$59,999	14%	11%	13%
\$60,000 - \$79,999	11%	13%	17%
\$80,000 - \$99,999	10%	9%	7%
\$100,000 - \$119,999	9%	9%	9%
\$120,000 - \$139,999	6%	11%	12%
\$140,000 - \$159,999	4%	4%	4%
\$160,000 - \$179,999	3%	5%	3%
\$180,000 - \$199,999	2%	3%	3%
\$200,000 and over	11%	13%	7%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$109,386	\$91,108

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