

## CHARACTERISTICS OF TRAVELERS FROM GERMANY TO CALIFORNIA - 2015

Germany was California's seventh largest overseas market (down from the sixth largest in 2014) with approximately 436,000 visitors to California in 2015. Collectively visitors from Germany spent approximately \$796 million in California (\$720 million in 2014).

German visitors to California during 2015 reported spending \$122 per day during a 15.0 night average stay or approximately \$1,825 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

### Visitors from Germany

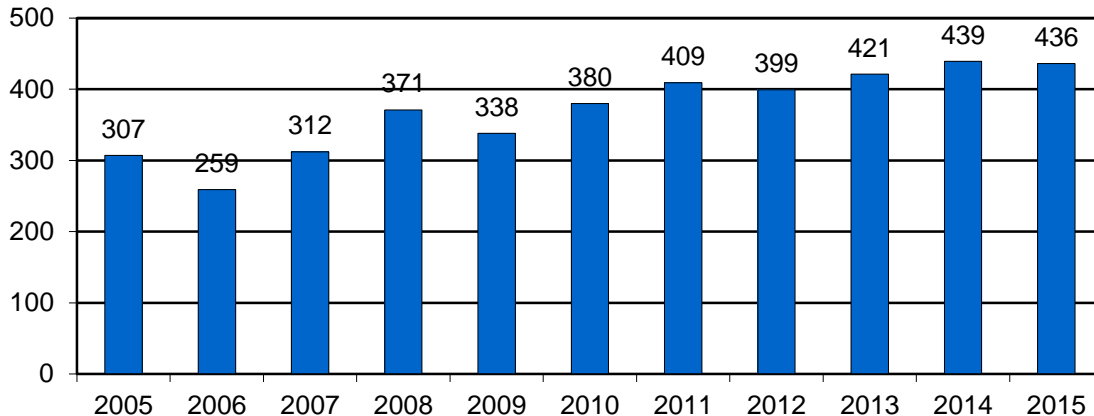
Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2005	1,415,530	21.7%	307,000
2006	1,385,520	18.7%	259,000
2007	1,524,151	20.5%	312,000
2008	1,782,229	20.8%	371,000
2009	1,686,825	20.0%	338,000
2010	1,726,193	22.0%	380,000
2011	1,823,797	22.4%	409,000
2012	1,875,952	21.3%	399,000
2013	1,916,471	22.0%	421,000
2014 <sup>3</sup>	1,968,536	22.3%	439,000
2015 <sup>3</sup>	2,058,430	21.2%	436,000

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

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics

### Number of Visitors from Germany to CA, 2005-2015 (in 000s)



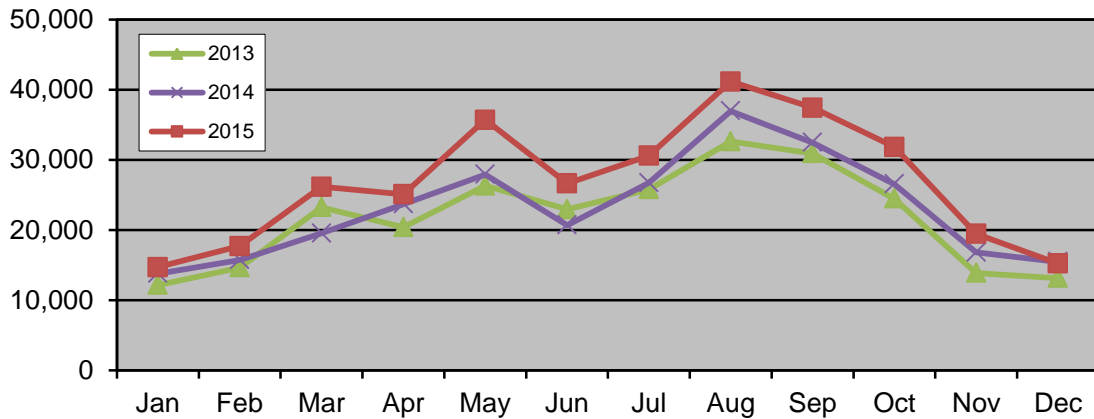
Source: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers.  
Revised by Tourism Economics for Visit California (October, 2015).

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 a slow upward trend in the number of visitors from Germany with slight increases and decreases through the years. Visitation to California from Germany decreased slightly in 2015 (436,000) from 2014 (439,000).

### German Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Germany to California were higher during most of 2015 as compared to 2014 & 2013. 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 fall and winter months of November, December, January, and February.

**Residents of Germany  
Monthly Port of Entry Arrivals to CA  
2013-2015**



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
- Visit San Francisco, Las Vegas or Flagstaff-Grand Canyon-Sedona 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 for transportation while in the U.S.
- Use credit cards to make purchases while in the U.S.

Conversely, visitors from Germany are less likely to:

- Use a private or company auto for transportation while in the U.S.
- Spend their money 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, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Germany (n = 608)	Leisure Visitors from Germany (n = 428)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	63%	81%
Visit Friends/Relatives	18%	15%	19%
Business	13%	9%	-
Convention/Conference	9%	7%	-
Other Purpose	6%	6%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	78%	91%
Visit Friends/Relatives	34%	33%	34%
Business	17%	11%	2%
Convention/Conference	12%	10%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	39%	38%
Online Travel Agency	34%	41%	45%
Personal Recommendation	29%	25%	27%
Travel Agency Office	23%	27%	30%
Travel Guide	15%	20%	23%
Corporate Travel Department	12%	11%	5%
Tour Operator/Travel Club	9%	5%	5%
National/State/City Travel Office	7%	9%	10%
<b>Advance Planning for Trip</b>			
7 days or less	5%	3%	1%
8 - 30 days	24%	15%	9%
31 - 60 days	19%	12%	11%
61 - 90 days	15%	12%	12%
More than 3 Months	38%	58%	68%
Total	100%	100%	100%
Average Planning Time in Days	108 days	144 days	162 days
<b>Advance Airline Reservations</b>			
7 days or less	8%	6%	4%
8 - 30 days	33%	20%	12%
31 - 60 days	20%	16%	16%
61 - 90 days	13%	12%	11%
91 - 120 days	9%	12%	15%
121 - 180 days	10%	19%	24%
6 Months or More	8%	15%	18%
Total	100%	100%	100%
Average Booking in Days	76 days	106 days	125 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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Germany (n = 608)	Leisure Visitors from Germany (n = 428)
<b>Means of Booking Air Trip**</b>			
Airlines Directly	31%	29%	31%
Internet Booking Service	29%	32%	34%
Travel Agency Office	26%	29%	31%
Corporate Travel Department	12%	10%	3%
Tour Operator/Travel Club	9%	5%	6%
Other	1%	1%	1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	31%	34%
Non-Stop Flights	17%	22%	23%
Convenient Schedule	15%	13%	10%
Previous Good Experience	9%	6%	5%
Mileage Bonus/Frequent Flyer Program	8%	5%	5%
Safety Reputation	9%	12%	13%
Loyalty to Carrier	3%	4%	4%
In-flight Service Reputation	3%	1%	1%
Employer policy	3%	3%	1%
On-time Reputation	2%	1%	1%
Other	3%	3%	4%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	83%	87%
Premium Economy	10%	9%	7%
Executive/Business	8%	8%	7%
First Class	1%	<1%	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	9%	11%
No	86%	91%	89%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	4%	4%
Meals	6%	3%	3%
Bus/Coach	6%	3%	4%
Guided Tours	6%	1%	2%
Rental Car	4%	5%	6%
Tour Guide for Entire Trip	5%	2%	2%
Airfare and Accommodation Only	3%	<1%	<1%
Cruise	2%	<1%	1%
Recreation	1%	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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Germany (n = 608)	Leisure Visitors from Germany (n = 428)
<b>Travel Companions**</b>			
Traveling Alone	59%	58%	43%
Spouse/Partner	22%	24%	33%
Family/Relatives	15%	12%	18%
Friends	6%	9%	11%
Business Associates	4%	1%	-
Tour Group	1%	1%	1%
<b>Average Travel Party Size</b>	1.7	1.6	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	73%	74%	74%
Private Home	32%	33%	36%
Other	6%	9%	8%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	25.4 nights	19.7 nights
Mean Nights in California	12.6 nights	15.0 nights	11.8 nights
% of California Nights	52%	59%	60%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	26%	27%
Average Trips to the U.S. in Past Year	1.7 trips	1.8 trips	1.6 trips
<b>Average Number of States Visited</b>	2.0 states	2.2 states	2.4 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.8 dest.	4.2 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	55%	59%
San Francisco	45%	56%	59%
Las Vegas	30%	39%	46%
New York City	15%	11%	12%
San Diego	14%	23%	23%
Anaheim-Santa Ana	8%	5%	4%
Flagstaff-Grand Canyon-Sedona	7%	19%	23%
San Jose	6%	6%	5%
DC Metro Area	5%	3%	2%
Monterey-Salinas	5%	7%	8%
Santa Barbara	4%	6%	6%
Riverside/San Bernardino	4%	8%	9%
Oahu	3%	2%	2%
Seattle	3%	4%	4%
Chicago	3%	2%	2%
Miami	2%	2%	2%
Sacramento	2%	5%	5%

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

**Characteristics of Travelers from Germany to California  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Germany (n = 608)	Leisure Visitors from Germany (n = 428)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	87%	89%
Sightseeing	83%	88%	91%
National Parks/Monuments	51%	67%	70%
Small Towns/Countryside	42%	58%	60%
Experience Fine Dining	40%	35%	35%
Amusement/Theme Parks	39%	32%	34%
Historical Locations	34%	46%	47%
Guided Tours	31%	35%	36%
Art Gallery/Museums	33%	29%	28%
Casino/Gamble	24%	32%	33%
Cultural/Ethnic Heritage Sites	20%	22%	23%
Concert/Play/Musical	20%	20%	20%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	64%	66%
Air Travel between U.S. Cities	44%	36%	34%
Auto, Private or Company	37%	28%	26%
City Subway/Tram/Bus	31%	36%	38%
Taxicab/Limousine	31%	26%	23%
Bus between Cities	19%	17%	19%
Ferry/River Taxi/Srt. Scenic Cruise	10%	10%	12%
Railroad between Cities	7%	6%	5%
Rented Bicycle/Motorcycle/Moped	5%	6%	6%
Cruise Ship/River Boat 1+ Nights	4%	2%	2%
Motor Home/Camper	2%	5%	7%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$2,884	\$2,807
Per Visitor Per Day (CA)	\$157	\$122	\$124
Per Visitor/Trip (California)	\$1,979	\$1,825	\$1,468
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	37.3%	30.5%
Air Transportation in the U.S.	5.9%	5.7%	4.3%
Entertainment	12.9%	12.3%	15.3%
Food/Beverages	19.9%	23.0%	27.2%
Gifts/Souvenirs	19.2%	9.3%	11.6%
Ground Transportation in the U.S.	6.3%	6.4%	8.2%
Other	4.2%	5.7%	2.9%

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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  
(2015 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 8,348)</b>	<b>All Visitors from Germany (n = 608)</b>	<b>Leisure Visitors from Germany (n = 428)</b>
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	43%	57%	55%
Cash from Home/Travelers Checks	27%	13%	16%
Cash Adv./Withdrawal Using Credit Card	18%	24%	24%
Cash Adv./Withdrawal Using Debit Card	6%	3%	3%
Purchases Using Debit Card	6%	22%	2%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	40 years	41 years
Average Age - Females	38 years	36 years	36 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	43%	40%
Service Occupations	11%	14%	15%
Student	12%	17%	14%
Sales and Office	11%	8%	10%
Retired	8%	7%	9%
Homemaker	4%	2%	2%
Prod., Trans., & Material Moving	3%	4%	4%
Military/Government	3%	3%	3%
Nat. Res., Const., & Maintenance	3%	1%	1%
Other	1%	1%	2%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	13%	11%
\$20,000 - \$39,999	15%	10%	11%
\$40,000 - \$59,999	15%	18%	20%
\$60,000 - \$79,999	14%	13%	14%
\$80,000 - \$99,999	10%	11%	10%
\$100,000 - \$119,999	10%	7%	8%
\$120,000 - \$139,999	4%	7%	6%
\$140,000 - \$159,999	4%	3%	3%
\$160,000 - \$179,999	3%	4%	4%
\$180,000 - \$199,999	1%	3%	3%
\$200,000 and over	10%	12%	12%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$98,273	\$99,291

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

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