

CHARACTERISTICS OF TRAVELERS FROM ISRAEL TO CALIFORNIA

Israel was one of California's large overseas markets with approximately 75,000 visitors to California in 2008. Collectively, visitors from Israel spent approximately \$117 million in California.

Israel visitors to California during 2008 reported spending \$82 per day during an 19.1 night average stay or approximately \$1,566 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

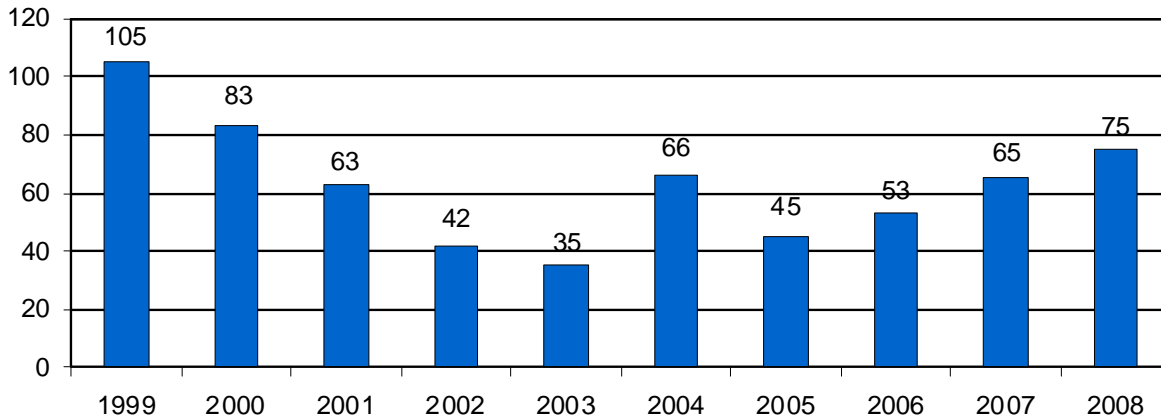
Visitors From Israel

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	269,752	39.6%	107,000
1999	283,306	37.2%	105,000
2000	325,199	25.5%	83,000
2001	305,431	20.5%	63,000
2002	263,097	16.1%	42,000
2003	249,034	14.0%	35,000
2004	275,373	23.9%	66,000
2005	284,310	16.0%	45,000
2006	283,889	17.8%	53,000
2007	313,077	20.9%	65,000
2008	332,257	22.7%	75,000

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

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

**Number of Visitors from Israel to CA, 1999-2008
(in 000s)**



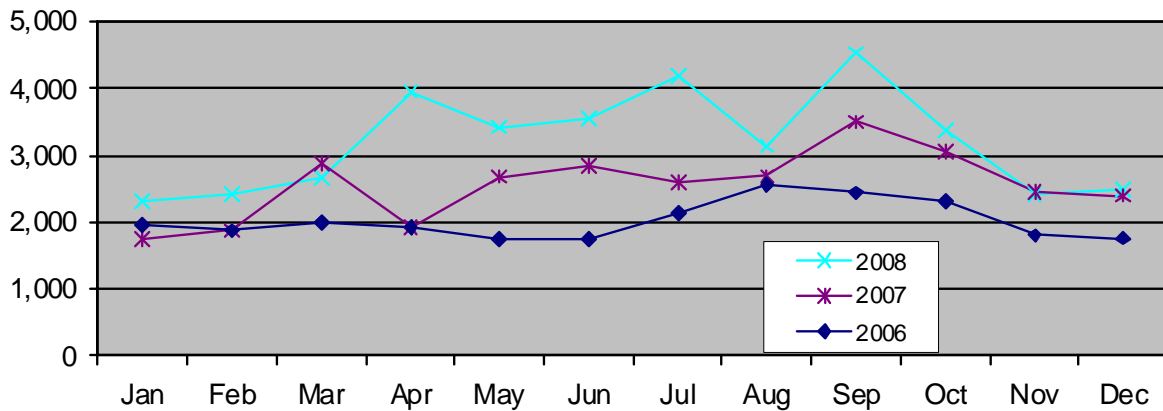
Source: International Trade Administration, Office of Travel and Tourism Industries.

From 1998 to 2003 the number of visitors from Israel to California dropped from a high of 107,000 to a low of 35,000 due to decreases in California’s market share. Since 2005 the number of visitors has risen from a low of 45,000 up to 75,000. This increase has occurred due to both an increase in the number of visitors to the U.S. from Israel and increases in California’s market share.

Israel Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Israel to California were higher in most months of 2008 compared with 2006 and 2007. In general, Israel residents arriving at California ports-of-entry peaked in July and September. The lowest volumes were recorded in the winter months.

**Residents of Israel
Monthly Port of Entry Arrivals to CA
2006-2008**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Israel 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 Israel are more likely to:

- Travel to California to visit friends or relatives or for business/professional purposes
- Use a travel agent for trip planning information and to book their trip
- Have a decidedly shorter trip planning and advance airline booking horizon
- Mention safety reputation and employer policy as a main factor in selecting an airline
- Travel in economy/tourist/coach class
- Travel alone
- Stay in a private home
- Stay longer in the U.S. and in California
- Visit New York City, San Jose, and the DC Metro Area as part of their trip
- Visit small towns, national parks, art galleries or museums, and tour the countryside, while in the U.S.
- Use airlines for transportation while in the U.S.
- Spend a lower proportion of their travel spending on lodging and entertainment, and a higher proportion on transportation in the U.S.
- Use cash to pay for trip expenses
- Have a lower average annual household income

Conversely, visitors from Israel are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Plan their trip with information direct from airlines
- Use a personal computer to book their air trip
- Travel in executive/business class
- Make use of a trip package
- Travel with a spouse
- Visit Los Angeles as part of their trip
- Use a company or private auto for transportation in the U.S.
- Use credit cards to pay for trip expenses

Characteristics of Travelers from Israel to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Israel (n = 124)	Leisure Visitors from Israel (n = 68)*
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	31%	54%
Visit Friends/Relatives	19	27	46
Business/Professional	27	40	-
Convention/Conference	7	2	-
Other Purpose	5	1	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	49%	72%
Visit Friends/Relatives	37	52	67
Business/Professional	31	41	1
Convention/Conference	11	4	2
Sources Used to Plan Trip**			
Airlines Directly	21%	10%	7%
Corporate Travel Department	11	10	-
Personal Computer	42	35	47
Friends/Relatives	16	15	25
Newspapers/Magazines	3	0	1
State/City Travel Office	4	11	18
Tour Company	6	0	1
Travel Agency	43	59	52
Travel Guides	10	12	19
Advance Planning for Trip			
7 days or less	9%	21%	10%
8 - 30 days	30	21	11
31 - 60 days	19	15	10
61 - 90 days	13	23	35
More than 3 Months	30	21	35
Total	100%	100%	100%
Average Planning Time in Days	92	70	101
Advance Airline Reservations			
7 days or less	16%	23%	10%
8 - 30 days	38	37	24
31 - 60 days	17	21	38
61 - 90 days	10	9	12
91 - 120 days	5	6	9
121 - 180 days	8	4	7
6 Months or More	6	1	1
Total	100%	100%	100%
Average Booking in Days	60	43	63

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

** Multiple response question. Table may add to more than 100%.

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Israel to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Israel (n = 124)	Leisure Visitors from Israel (n = 68)*
Means of Booking Air Trip			
Airlines Directly	12%	4%	1%
Corporate Travel Department	11	7	1
Personal Computer	22	6	6
Travel Agent	48	76	89
Travel Club	1	-	-
Tour Operator	4	2	2
Other/Don't Know	3	5	1
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	30%	46%
Schedule	15	16	16
Non-Stop Flight	13	14	23
Mileage Bonus/Frequent Flyer Program	12	4	-
Previous Good Experience	10	5	-
Safety Reputation	7	15	10
Airline Loyalty	4	1	2
In-flight Service	5	-	-
Employer policy	4	15	-
Other	6	1	2
Airline Seating Area			
Economy/Tourist/Coach	77%	97%	100%
Executive/Business	20	3	-
First Class	3	-	-
Total	100%	100%	100%
Use of Package			
Yes	11%	1%	1%
No	89	99	99
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	26	-	-
31 - 60 days	23	100%	100%
61 - 90 days	12	-	-
91 - 120 days	5	-	-
121 - 180 days	17	-	-
6 Months or More	14	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from Israel to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Israel (n = 124)	Leisure Visitors from Israel (n = 68)*
Travel Companions**			
Business Associates	10%	5%	-
Family/Relatives	23	30	44%
Friends	12	16	30
Spouse	27	14	10
Tour Group	2	-	-
Traveling Alone	39	49	42
Average Travel Party Size	1.5	1.4	1.5
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	70%	64%
Private Home	28	37	46
Other	4	5	6
Length of Stay			
Mean Nights in the U.S.	21.2	36.9	52.7
Mean Nights in California	11.0	19.1	24.0
% of California Nights	52%	52%	46%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	29%	27%
Average Trips to the U.S. in Past Year	2.0	1.9	1.4
Average Trips to the U.S. in Past 5 Years	6.3	5.6	3.6
Average Number of States Visited	2.0	2.7	3.3
Average Number of Destinations Visited	2.9	3.5	4.4
Places Visited in the U.S.**			
Los Angeles	53%	41%	48%
San Francisco	49	49	58
Las Vegas	28	30	53
New York City	17	42	45
San Diego	13	18	14
San Jose	7	20	11
Anaheim-Santa Ana	7	1	1
Yosemite	5	2	4
Grand Canyon	4	-	-
Chicago	4	7	3
DC Metro Area	4	14	24
Monterey-Salinas	4	5	2
Seattle	3	1	2
Sacramento	3	4	3
Riverside/San Bernardino	3	-	-
Santa Barbara	3	5	2
Oakland	3	7	6

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**Characteristics of Travelers from Israel to California
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Israel (n = 124)	Leisure Visitors from Israel (n = 68)*
Activities Experienced While in the U.S.**			
Dining Out	87%	88%	90%
Shopping	85	90	95
Sightseeing in Cities	53	55	63
Historical Places	44	42	55
Visiting Small Towns	36	59	73
National Parks	35	52	64
Amusement/Theme Parks	34	34	42
Touring Countryside	30	40	40
Cultural Heritage Sites	28	28	29
Casinos/Gambling	24	19	31
Art Gallery/Museum	23	48	54
Guided Tours	22	9	15
Transportation While in the U.S.**			
Taxi/Limousine	42%	43%	29%
Airlines in U.S.	40	55	63
Rented Auto	36	41	35
Company or Private Auto	28	13	19
City Subway/Tram/Bus	26	23	27
Railroad between Cities	11	16	9
Bus between Cities	9	10	16
Motor Home/Camper	2	3	5
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$4,233	\$6,801
Per Visitor/Trip (U.S.)	2,607	3,028	4,451
Per Visitor Per Day	123	82	85
Per Visitor/Trip (California)	\$1,353	\$1,566	\$2,040
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$666	\$891
Food/Beverages	526	494	675
Gifts/Souvenirs	450	467	620
Transportation in the U.S.	425	688	1,034
Entertainment	234	150	253
Expenses at the Airport	37	12	13
Other	135	551	966
Total Spending Per Visitor/Trip	\$2,607	\$3,028	\$4,451

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Payment Method for Trip Expenses			
Credit Cards	53%	40%	20%
Cash	37	56	73
Debit Cards	6	3	4
Travelers Checks	3	2	3
Total	100%	100%	100%
Age			
Average Age - Males	41	43	44
Average Age - Females	38	36	37
Occupation			
Manager/Executive	34%	33%	22%
Professional/Technical	32	37	29
Student	8	13	22
Clerical/Sales	7	6	12
Retired	6	4	6
Other	13	8	9
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	13%	25%
\$20,000 - \$39,999	10	8	13
\$40,000 - \$59,999	13	12	20
\$60,000 - \$79,999	11	12	10
\$80,000 - \$99,999	11	16	13
\$100,000 - \$119,999	11	11	13
\$120,000 - \$139,999	7	12	-
\$140,000 - \$159,999	6	7	-
\$160,000 - \$179,999	4	2	4
\$180,000 - \$199,999	3	2	2
\$200,000 and over	18	4	0
Total	100%	100%	100%
Average Annual Income	\$107,200	\$87,100	\$60,800

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