

CHARACTERISTICS OF TRAVELERS FROM SPAIN TO CALIFORNIA - 2008

Spain was one of California's large overseas markets with approximately 101,000 visitors to California in 2008. Collectively visitors from Spain spent approximately \$94 million in California.

Spanish visitors to California during 2007 reported spending \$88 per day during a 10.6 night average stay or approximately \$933 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

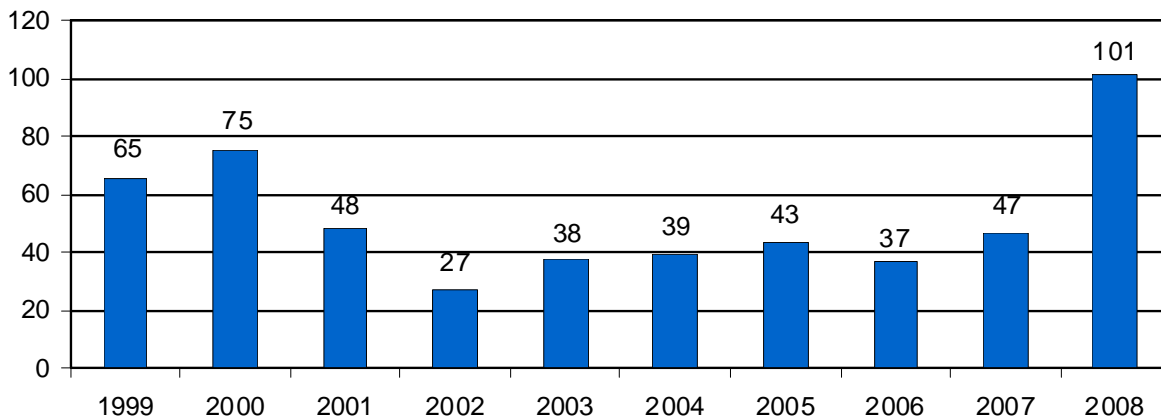
Visitors From Spain

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1999	362,848	17.9%	65,000
2000	361,177	20.8%	75,000
2001	291,052	16.5%	48,000
2002	269,520	10.0%	27,000
2003	284,031	13.4%	38,000
2004	333,432	11.7%	39,000
2005	385,640	11.2%	43,000
2006	424,224	8.7%	37,000
2007	516,471	9.1%	47,000
2008	658,333	15.4%	101,000

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 Spain to CA, 1999-2008 (in 000s)



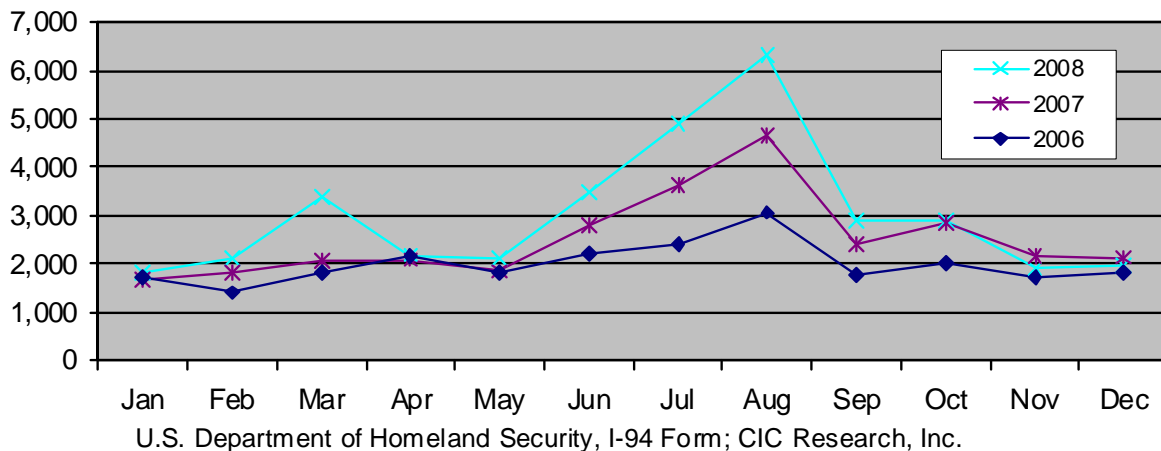
Source: International Trade Administration, Office of Travel and Tourism Industries.

During the past 10 years, the visitor volume to California from Spain peaked in 2000 at a volume of 75,000 visitors. Since then, it has increased and decreased over the years, but always remained below a visitor volume of 50,000 until 2008 where it reached 101,000 visitors. California's market share of U.S. visitors from Spain increased in 2008 to over 15 percent for the first time in 7 years.

Spanish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Spain to California were markedly higher in several months of 2008 compared with 2006 and 2007. In general, Spanish resident arrivals at California ports-of-entry peaked in August. The lowest volumes were recorded in November, December, and January.

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



Comparisons with Overseas Visitors

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

- Use a personal computer for trip planning information and to book their air trip
- Select an airline due to airfare or schedule
- Fly in economy/tourist/coach class
- Be on their first trip to the U.S.
- Visit Las Vegas, the Grand Canyon and San Francisco as part of their trip
- Visit historical places, small towns, and art galleries or museums while in the U.S.
- Use public transit for transportation while in the U.S.
- Spend a lower percentage of their travel dollar per visitor/per trip
- Have a younger average age for both males and females
- Have a professional or technical occupation
- Have a lower average household income

Conversely, visitors from Spain are less likely to:

- Plan or book their air trip with help from a travel agent
- Fly in executive/business class
- Travel with family/relatives

Characteristics of Travelers from Spain to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Spain (n = 171)	Leisure Visitors from Spain (n = 116)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	51%	71%
Visit Friends/Relatives	19	21	29
Business/Professional	27	20	-
Convention/Conference	7	3	-
Other Purpose	5	5	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	67%	84%
Visit Friends/Relatives	37	35	41
Business/Professional	31	23	1
Convention/Conference	11	9	-
Sources Used to Plan Trip**			
Airlines Directly	21%	15%	10%
Corporate Travel Department	11	7	4
Personal Computer	42	50	48
Friends/Relatives	16	13	16
Newspapers/Magazines	3	2	2
State/City Travel Office	4	6	6
Tour Company	6	2	1
Travel Agency	43	32	35
Travel Guides	10	6	8
Advance Planning for Trip			
7 days or less	9%	3%	-
8 - 30 days	30	31	28%
31 - 60 days	19	21	22
61 - 90 days	13	14	16
More than 3 Months	30	31	33
Total	100%	100%	100%
Average Planning Time in Days	92	93	89
Advance Airline Reservations			
7 days or less	16%	7%	4%
8 - 30 days	38	39	36
31 - 60 days	17	26	30
61 - 90 days	10	7	8
91 - 120 days	5	9	14
121 - 180 days	8	10	7
6 Months or More	6	2	1
Total	100%	100%	100%
Average Booking in Days	60	61	62

* 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 Spain to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Spain (n = 171)	Leisure Visitors from Spain (n = 116)
Means of Booking Air Trip			
Airlines Directly	12%	6%	6%
Corporate Travel Department	11	7	1
Personal Computer	22	45	44
Travel Agent	48	36	42
Travel Club	1	-	-
Tour Operator	4	1	1
Other/Don't Know	3	6	5
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	43%	41%
Schedule	15	29	32
Non-Stop Flight	13	12	10
Mileage Bonus/Frequent Flyer Program	12	4	2
Previous Good Experience	10	2	2
Safety Reputation	7	4	5
Airline Loyalty	4	1	1
In-flight Service	5	-	-
Employer policy	4	-	-
Other	6	6	6
Airline Seating Area			
Economy/Tourist/Coach	77%	89%	91%
Executive/Business	20	9	7
First Class	3	2	1
Total	100%	100%	100%
Use of Package			
Yes	11%	14%	20%
No	89	86	80
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	2%	2%
8 - 30 days	26	38	38
31 - 60 days	23	29	29
61 - 90 days	12	21	21
91 - 120 days	5	-	-
121 - 180 days	17	10	10
6 Months or More	14	0	0
Total	100%	100%	100%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Spain (n = 171)	Leisure Visitors from Spain (n = 116)
Travel Companions**			
Business Associates	10%	5%	-
Family/Relatives	23	12	16%
Friends	12	18	25
Spouse	27	30	38
Tour Group	2	1	1
Traveling Alone	39	38	26
Average Travel Party Size	1.5	1.5	1.6
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	78%	72%
Private Home	28	32	34
Other	4	5	8
Length of Stay			
Mean Nights in the U.S.	21.2	21.5	20.2
Mean Nights in California	11.0	10.6	10.9
% of California Nights	52%	49%	54%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	40%	45%
Average Trips to the U.S. in Past Year	2.0	1.5	1.3
Average Trips to the U.S. in Past 5 Years	6.3	3.5	2.0
Average Number of States Visited	2.0	2.2	2.4
Average Number of Destinations Visited	2.9	3.3	3.7
Places Visited in the U.S.**			
Los Angeles	53%	50%	59%
San Francisco	49	61	63
Las Vegas	28	37	50
New York City	17	25	31
San Diego	13	15	14
San Jose	7	3	1
Anaheim-Santa Ana	7	2	1
Yosemite	5	13	11
Grand Canyon	4	14	15
Chicago	4	4	5
DC Metro Area	4	2	2
Monterey-Salinas	4	6	8
Seattle	3	1	1
Sacramento	3	3	1
Riverside/San Bernardino	3	2	4
Santa Barbara	3	8	12
Oakland	3	1	-

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(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Spain (n = 171)	Leisure Visitors from Spain (n = 116)
Activities Experienced While in the U.S.**			
Dining Out	87%	86%	83%
Shopping	85	82	82
Sightseeing in Cities	53	47	50
Historical Places	44	67	76
Visiting Small Towns	36	50	53
National Parks	35	43	49
Amusement/Theme Parks	34	25	30
Touring Countryside	30	21	23
Cultural Heritage Sites	28	26	31
Casinos/Gambling	24	27	36
Art Gallery/Museum	23	34	26
Guided Tours	22	16	20
Transportation While in the U.S.**			
Taxi/Limousine	42%	40%	37%
Airlines in U.S.	40	43	34
Rented Auto	36	43	48
Company or Private Auto	28	26	22
City Subway/Tram/Bus	26	39	35
Railroad between Cities	11	10	11
Bus between Cities	9	9	10
Motor Home/Camper	2	1	2
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$2,840	\$3,053
Per Visitor/Trip (U.S.)	2,607	1,895	1,862
Per Visitor Per Day	123	88	92
Per Visitor/Trip (California)	\$1,353	\$933	\$1,003
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$506	\$531
Food/Beverages	526	441	436
Gifts/Souvenirs	450	322	259
Transportation in the U.S.	425	276	288
Entertainment	234	204	191
Expenses at the Airport	37	24	23
Other	135	122	132
Total Spending Per Visitor/Trip	\$2,607	\$1,895	\$1,862

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Payment Method for Trip Expenses			
Credit Cards	53%	50%	18%
Cash	37	42	45
Debit Cards	6	8	7
Travelers Checks	3	1	1
Total	100%	100%	100%
Age			
Average Age - Males	41	37	34
Average Age - Females	38	32	34
Occupation			
Manager/Executive	34%	28%	27%
Professional/Technical	32	46	42
Student	8	14	15
Clerical/Sales	7	3	4
Retired	6	3	5
Other	13	5	7
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	5%	3%
\$20,000 - \$39,999	10	16	15
\$40,000 - \$59,999	13	25	26
\$60,000 - \$79,999	11	15	16
\$80,000 - \$99,999	11	9	7
\$100,000 - \$119,999	11	7	8
\$120,000 - \$139,999	7	3	3
\$140,000 - \$159,999	6	2	3
\$160,000 - \$179,999	4	2	2
\$180,000 - \$199,999	3	5	6
\$200,000 and over	18	12	11
Total	100%	100%	100%
Average Annual Income	\$107,200	\$88,100	\$91,200

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