



Travel Trade Barometer



INTERNATIONAL
TRADE
ADMINISTRATION

California - Germany 2009 Issue S3

CALIFORNIA GERMANY TRAVEL TRADE BAROMETER

California Destination Report for: Second quarter 2009;
and projected third and fourth quarter 2009 bookings

September 2009

A Travel Market Insights program, conducted in partnership with the U.S. Travel Association and the U.S. Department of Commerce/Office of Travel and Tourism Industries (OTTI).



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California Highlights

- Second quarter 2009 bookings from Germany to California were on par with 2008.
- Trade projected no change in bookings for third quarter 2009, compared to third quarter 2008.
- Fourth quarter 2009 bookings were projected to be on par, on average, compared to last year.

Germany Travel Trade Barometer 2009 S3												
	2nd Qtr 2009				3rd Qtr 2009 (P)				4th Qtr 2009 (P)			
	AVG	↑	NC	↓	AVG	↑	NC	↓	AVG	↑	NC	↓
U.S.	NC	50%	14%	36%	AS	36%	29%	36%	AS	29%	29%	36%
California	NC	43%	21%	36%	AS	36%	29%	36%	AS	36%	29%	29%

(P) = Projected Bookings
 AVG = Average
 ↑ = Increased
 AS = About the same
 ↓ = Decreased
 NC = No Change



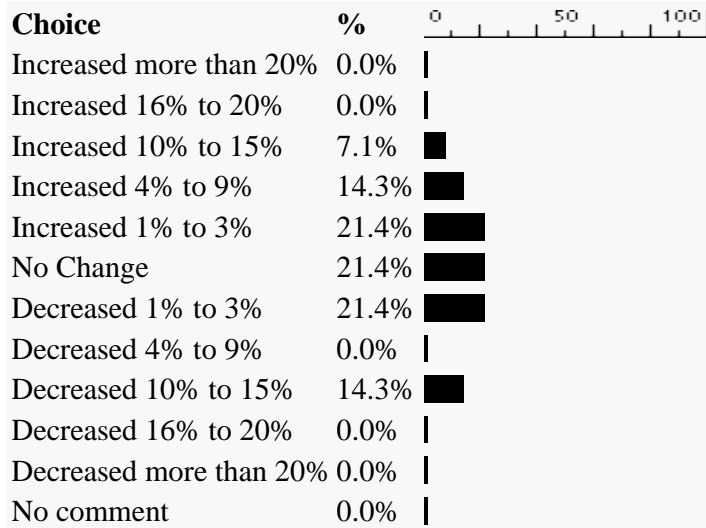
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California Second Quarter 2009 Bookings

- Bookings for California in second quarter 2009 were on par with bookings compared to 2008 bookings.
- On the positive side, just over two fifths (43%) of the trade reported an increase in bookings. Approximately one fifth (21%) of the trade reported no change in bookings. In contrast, 36 percent of the trade reported bookings decreased.
- By comparison, bookings to the U.S. were reported to also be on par with last year.

California Second Quarter 2009 Bookings





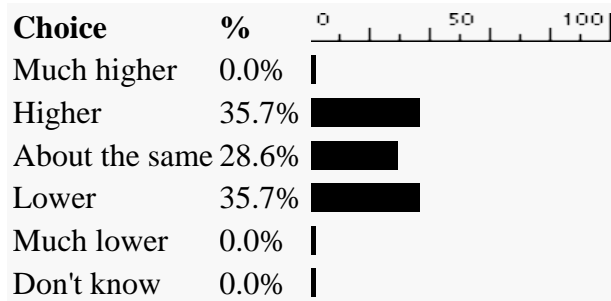
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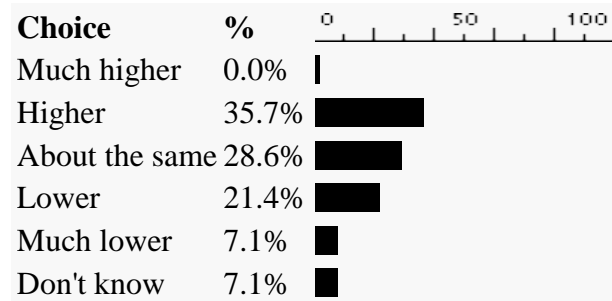
California Projected Third and Fourth Quarter 2009 Bookings

- Bookings to California from Germany for third quarter 2009 were projected to be on par with last summer. Over one third (36%) of the respondents projected higher bookings. Just under three out of ten (29%) of the trade projected bookings to be on par with last year. In contrast, 36% of the trade projected bookings to be lower, compared to third quarter 2008.
- California bookings were projected to be on par for the fourth quarter as well. Similar to the third quarter, over one third (36%) of the respondents projected higher bookings. Just under three out of ten (29%) of the trade projected bookings to be on par with last year. In contrast, 29% of the trade projected bookings to be lower, compared to third quarter 2008. A small minority of respondents had no comment.
- By comparison, U.S. bookings for the third and fourth quarter were also projected to be on par with 2008.

Projected 3rd Qtr 2009 Bookings for California



Projected 4th Qtr 2009 Bookings for California





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“To what degree are the following factors likely to motivate or deter bookings to the United States in the next six months?”

German Motivators and Deterrents for Travel to the United States	S1 2009				S2 2009				S3 2009			
	Average	Rank			Average	Rank			Average	Rank		
		Mot	Det	NI		Mot	Det	NI		Mot	Det	NI
Accommodation rates	4.1			NI	2.5	2			3.4	1		
Airfare	4.9		7		3.7			NI	3.7	2		
Exchange rate to U.S. Dollar	4.1			NI	2.1	1			3.8	3		
Environmental perception of the U.S. travel product	4.4			NI	4.2			NI	4.0			NI
Travel safety to the U.S.	3.9			NI	3.9			NI	4.3			NI
Air capacity	4.1			NI	4.5			NI	4.3			NI
Level of info. for consumer regarding entry requirements	4.3			NI	4.7		10		4.3			NI
Level of promotion by U.S. destinations and businesses	3.9			NI	4.2			NI	4.3			NI
Visa processing time	4.5			NI	5.2		6		4.4			NI
Economy in Germany	6.4		1		6.1		2		6.0		1	
Global economy	6.3		2		6.3		1		5.9		2	
Requirement to collect 10 fingerprints	5.2		5		5.9		4		5.1		3	
Level of promotion by other long-haul destinations	5.4		3		4.9		8		5.1		4	
Pandemic/epidemic; i.e. SARS, H1N1 Flu, etc.	-				4.9		9		5.1		5	
Entry and exit requirements	5.1		6		6.1		3		4.9		6	
Natural disasters in the U.S.	4.9		8		5.0		7		4.9		7	
Requirement to implement ESTA	5.2		4		5.8		5		4.9		8	

Scale: 1 = strong motivator; 4 = no impact; 7 = strong deterrent

Mot = motivator; Det = deterrent; NI = no impact