

CHARACTERISTICS OF TRAVELERS FROM FRANCE TO CALIFORNIA – 2013

France was California's sixth largest overseas market with approximately 389,000 visitors to California in 2013. Collectively visitors from France spent approximately \$673 million in California.

French visitors to California during 2013 reported spending \$189 per day during a 9.2 night average stay or approximately \$1,734 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

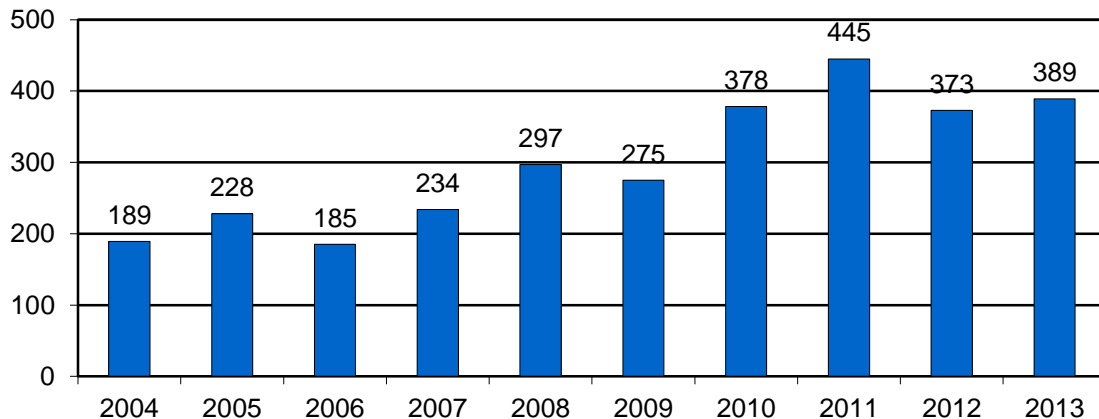
Visitors From France

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	688,887	24.7%	170,000
2004	775,274	24.4%	189,000
2005	878,648	25.9%	228,000
2006	789,815	23.4%	185,000
2007	997,506	23.5%	234,000
2008	1,243,942	23.9%	297,000
2009	1,204,490	22.8%	275,000
2010	1,342,207	28.2%	378,000
2011	1,504,182	29.6%	445,000
2012	1,455,720	25.6%	373,000
2013	1,504,654	25.9%	389,000

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 France to CA, 2004-2013 (in 000s)



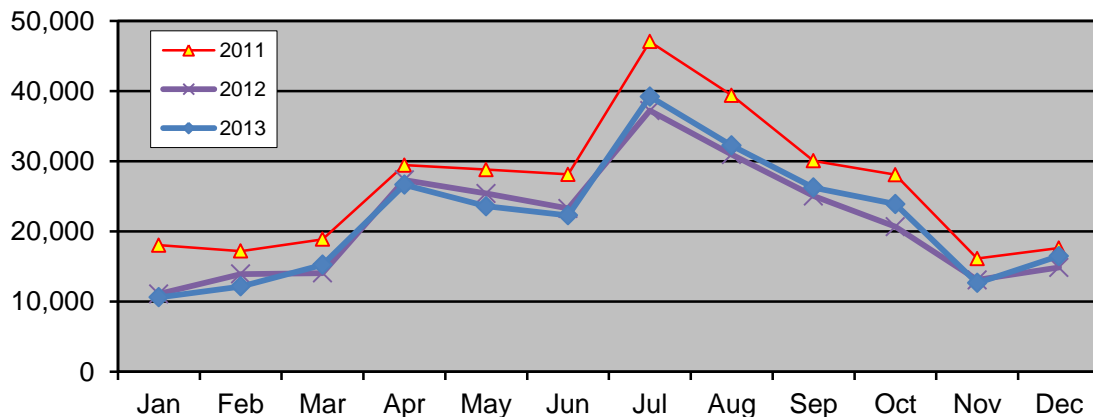
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

The volume of visitors to California from France tended to gradually rise throughout the decade of the 1990s reaching a peak of 356,000 visitors in 1999. In 1999 California's market share of visitors to the U.S. from France began to decrease from a peak of about one-third (34%) to just one-quarter (25%) in 2001. This loss of market share combined with the reduction in U.S. visitors from France following the 9-11 terrorist attacks caused the number of visitors to California from France to drop to under 200,000 by 2002 (down 47% from the peak). Since then, both market share and visitor volume have risen and fallen over the years. Visitor volume was at 389,000 visitors in 2013 (from a peak of 445,000 in 2011) and the market share was at 25.9% (from a peak of 29.6% in 2011).

French Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from France to California were similar in the months of 2013 compared with 2012. In all years, French resident arrivals at California ports-of-entry peaked in July. The lowest volumes were recorded in January and February, as well as November and December.

**Residents of France
Monthly Port of Entry Arrivals to CA
2011-2013**



Source: U.S. Department of Homeland Security, I-94 International Arrival Records.
CIC Research, Inc.

Comparisons with Overseas Visitors

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

- Travel to California for vacation/holiday purposes
- Have longer trip planning and advance airline booking horizons
- Use an inclusive travel package, particularly ones including guided tours, meals, or a tour guide for the entire trip
- Visit San Francisco, Las Vegas, and Flagstaff/Grand Canyon
- Visit national parks/monuments
- Use a rented auto for transportation in the U.S.
- Spend more while in the U.S.
- Spend a higher percentage of their travel dollar on food/beverages
- Make purchases using cash from home/travelers checks
- Have a lower average annual household income

Conversely, visitors from France are less likely to:

- Travel to California to visit friends/relatives
- Book their air trip via a travel agency office
- Attend a concert, play, or musical while in the U.S.
- Use a private or company auto or air travel between cities for transportation while in the U.S.
- Make purchases using their credit card while on their trip
- Have a management, business, science, or arts occupation

Characteristics of Travelers from France to California – 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from France (n = 285)	Leisure Visitors from France (n = 217)
Primary Purpose of Trip			
Vacation/Holidays	52%	71%	87%
Visit Friends/Relatives	17%	11%	13%
Business	15%	9%	-
Convention/Conference	9%	4%	-
Other Purpose	8%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	79%	91%
Visit Friends/Relatives	32%	22%	26%
Business	20%	13%	-
Convention/Conference	12%	6%	1%
Sources Used to Plan Trip**			
Airline	43%	38%	36%
Online Travel Agency	31%	29%	29%
Travel Agency Office	26%	19%	22%
Personal Recommendation	26%	27%	29%
Travel Guide	15%	19%	21%
Corporate Travel Department	14%	12%	7%
Tour Operator/Travel Club	9%	8%	9%
National/State/City Travel Office	8%	6%	5%
Advance Planning for Trip			
7 days or less	5%	3%	2%
8 - 30 days	27%	10%	6%
31 - 60 days	17%	19%	17%
61 - 90 days	14%	14%	14%
More than 3 Months	36%	54%	61%
Total	100%	100%	100%
Average Planning Time in Days	105 days	144 days	155 days
Advance Airline Reservations			
7 days or less	10%	5%	3%
8 - 30 days	35%	26%	22%
31 - 60 days	17%	17%	16%
61 - 90 days	13%	16%	17%
91 - 120 days	8%	13%	15%
121 - 180 days	9%	13%	13%
6 Months or More	7%	11%	14%
Total	100%	100%	100%
Average Booking in Days	72 days	93 days	103 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 France to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from France (n = 285)	Leisure Visitors from France (n = 217)
Means of Booking Air Trip**			
Travel Agency Office	31%	22%	23%
Airlines Directly	28%	33%	35%
Internet Booking Service	24%	25%	26%
Corporate Travel Department	15%	11%	4%
Tour Operator/Travel Club	9%	9%	10%
Other	2%	3%	3%
Main Factor in Selecting Airline			
Airfare	29%	30%	32%
Non-Stop Flights	17%	17%	16%
Convenient Schedule	15%	14%	15%
Mileage Bonus/Frequent Flyer Program	9%	10%	11%
Previous Good Experience	9%	7%	7%
Safety Reputation	6%	8%	8%
Loyalty to Carrier	4%	5%	4%
Employer policy	3%	3%	-
In-flight Service Reputation	3%	2%	3%
On-time Reputation	2%	1%	-
Other	4%	4%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	85%	86%
Executive/Business	10%	2%	2%
Premium Economy	10%	12%	11%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	24%	27%
No	85%	76%	73%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	15%	18%
Bus/Coach	7%	14%	17%
Guided Tours	6%	16%	20%
Meals	6%	16%	18%
Rental Car	5%	9%	10%
Tour Guide for Entire Trip	4%	14%	18%
Airfare and Accommodation Only	3%	3%	2%
Cruise	2%	6%	7%
Recreation	1%	6%	8%

* 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 France to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from France (n = 285)	Leisure Visitors from France (n = 217)
Travel Companions**			
Traveling Alone	61%	54%	40%
Spouse/Partner	21%	24%	34%
Family/Relatives	13%	19%	25%
Friends	6%	8%	11%
Business Associates	4%	2%	1%
Tour Group	1%	4%	5%
Average Travel Party Size	1.6	1.8	2.1
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	84%	82%
Private Home	27%	27%	30%
Other	6%	5%	7%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	22.0 nights	18.4 nights
Mean Nights in California	12.2 nights	9.2 nights	9.3 nights
% of California Nights	54%	42%	51%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	34%	37%
Average Trips to the U.S. in Past Year	1.7 trips	1.5 trips	1.3 trips
Average Number of States Visited	2.0 states	2.2 states	2.3 states
Average Number of Destinations Visited	3.0 dest.	3.8 dest.	4.1 dest.
Places Visited in the U.S.**			
Los Angeles	59%	66%	71%
San Francisco	47%	70%	74%
Las Vegas	30%	44%	51%
New York City	16%	13%	13%
San Diego	13%	12%	14%
Anaheim-Santa Ana	8%	4%	3%
Flagstaff-Grand Canyon-Sedona	7%	22%	26%
San Jose	6%	4%	2%
DC Metro Area	4%	2%	1%
Monterey-Salinas	4%	9%	8%
Oahu	4%	4%	3%
Santa Barbara	3%	5%	5%
Riverside/San Bernardino	3%	2%	2%
Chicago	3%	2%	<1%
Seattle	3%	2%	1%
Sacramento	3%	3%	3%
Miami	3%	6%	5%

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** 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 France to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from France (n = 285)	Leisure Visitors from France (n = 217)
Activities Experienced While in the U.S.**			
Shopping	88%	87%	89%
Sightseeing	84%	87%	89%
National Parks/Monuments	49%	62%	70%
Experience Fine Dining	43%	47%	50%
Small Towns/Countryside	41%	44%	44%
Amusement/Theme Parks	38%	38%	42%
Historical Locations	37%	39%	45%
Guided Tours	33%	33%	34%
Art Gallery/Museums	30%	29%	25%
Casino/Gamble	25%	30%	34%
Cultural/Ethnic Heritage Sites	21%	21%	25%
Concert/Play/Musical	20%	10%	11%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	32%	30%
Rented Auto	43%	53%	54%
Auto, Private or Company	37%	27%	28%
City Subway/Tram/Bus	33%	38%	39%
Taxicab/Limousine	33%	24%	19%
Bus between Cities	18%	27%	26%
Ferry/River Taxi/Srt. Scenic Cruise	12%	14%	15%
Railroad between Cities	8%	4%	2%
Rented Bicycle/Motorcycle/Moped	5%	8%	9%
Cruise Ship/River Boat 1+ Nights	4%	3%	3%
Motor Home/Camper	2%	1%	2%
Visitor Spending in the U.S.***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$4,148	\$3,516
Per Visitor Per Day (CA)	\$159	\$189	\$191
Per Visitor/Trip (California)	\$1,940	\$1,734	\$1,777
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	23.3%	21.7%
Air Transportation in the U.S.	6.9%	6.5%	5.1%
Entertainment	12.2%	16.4%	16.0%
Food/Beverages	17.8%	24.3%	23.6%
Gifts/Souvenirs	21.9%	18.3%	19.8%
Ground Transportation in the U.S.	5.6%	6.3%	7.4%
Other	6.3%	5.1%	6.4%

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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 France to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from France (n = 285)	Leisure Visitors from France (n = 217)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	35%	31%
Cash from Home/Travelers Checks	26%	35%	40%
Cash Adv./Withdrawal Using Credit Card	18%	23%	22%
Cash Adv./Withdrawal Using Debit Card	7%	4%	4%
Purchases Using Debit Card	6%	4%	4%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	45 years	47 years
Average Age - Females	39 years	40 years	42 years
Occupation			
Mgmt., Business, Science, & Arts	44%	33%	29%
Service Occupations	11%	12%	14%
Student	11%	11%	9%
Sales and Office	10%	8%	8%
Retired	8%	14%	16%
Homemaker	5%	5%	6%
Prod., Trans., & Material Moving	4%	5%	5%
Military/Government	4%	4%	3%
Nat. Res., Const., & Maintenance	3%	4%	6%
Other	2%	5%	5%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	19%	21%
\$20,000 - \$39,999	14%	14%	14%
\$40,000 - \$59,999	14%	16%	17%
\$60,000 - \$79,999	12%	17%	14%
\$80,000 - \$99,999	10%	11%	12%
\$100,000 - \$119,999	8%	4%	4%
\$120,000 - \$139,999	6%	9%	9%
\$140,000 - \$159,999	5%	1%	1%
\$160,000 - \$179,999	3%	2%	3%
\$180,000 - \$199,999	3%	2%	2%
\$200,000 and over	12%	5%	4%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$75,323	\$72,798

* 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."