

CHARACTERISTICS OF TRAVELERS FROM FRANCE TO CALIFORNIA – 2014

France was California’s fifth largest overseas market with approximately 445,000 visitors to California in 2014. Collectively visitors from France spent approximately \$786 million in California.

French visitors to California during 2014 reported spending \$160 per day during a 11.0 night average stay or approximately \$1,765 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

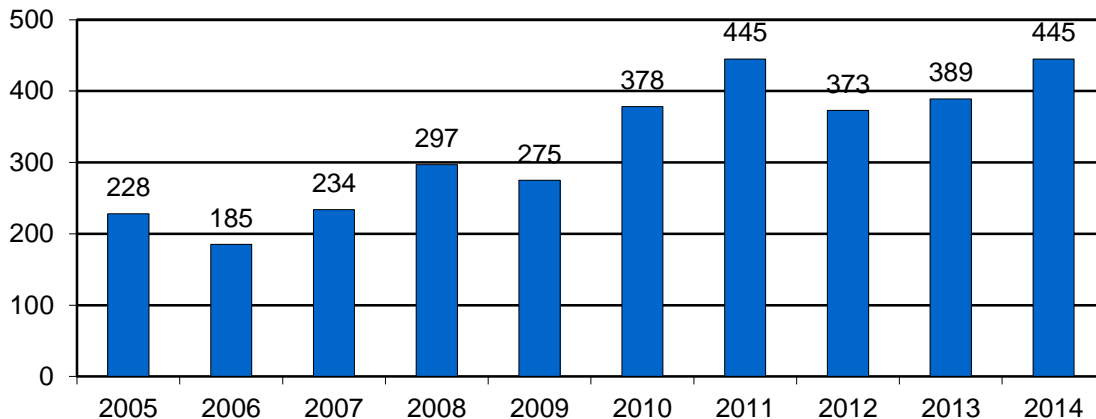
Visitors From France

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2014	1,624,604	27.4%	445,000

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, 2005-2014 (in 000s)



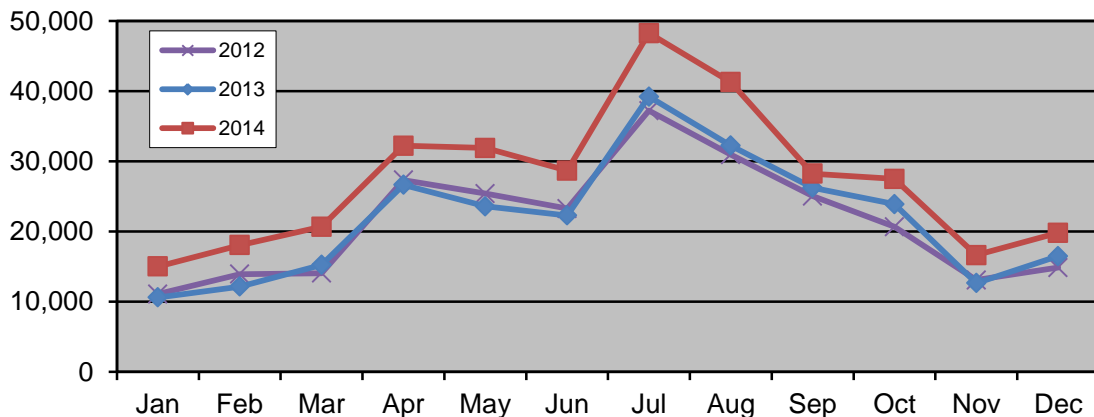
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.
Revised by Tourism Economics for Visit California (October, 2015).

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 a peak of 445,000 in 2014 and the market share was at 27.4% (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 slightly higher in the months of 2014 compared with 2013 and 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
2012-2014**



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 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 a longer trip planning horizon
- Visit San Francisco, Las Vegas, and Flagstaff/Grand Canyon
- Visit national parks/monuments as well as casino's/gambling
- Spend a higher percentage of their travel dollar on entertainment, and less on gifts/souvenirs
- Make purchases with a cash advance/withdrawal using a credit card
- Have a lower average annual household income

Conversely, visitors from France are less likely to:

- Use air travel between cities for transportation while in the U.S.

Characteristics of Travelers from France to California – 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from France (n = 392)	Leisure Visitors from France (n = 293)
Primary Purpose of Trip			
Vacation/Holidays	54%	63%	78%
Visit Friends/Relatives	18%	18%	22%
Business	13%	9%	-
Convention/Conference	8%	5%	-
Other Purpose	7%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	74%	86%
Visit Friends/Relatives	34%	28%	32%
Business	18%	12%	<1%
Convention/Conference	12%	8%	<1%
Sources Used to Plan Trip**			
Airline	43%	38%	41%
Online Travel Agency	32%	33%	36%
Travel Agency Office	25%	18%	18%
Personal Recommendation	29%	24%	24%
Travel Guide	15%	16%	18%
Corporate Travel Department	12%	12%	5%
Tour Operator/Travel Club	10%	10%	12%
National/State/City Travel Office	8%	3%	4%
Advance Planning for Trip			
7 days or less	5%	7%	6%
8 - 30 days	25%	15%	11%
31 - 60 days	19%	17%	18%
61 - 90 days	15%	15%	13%
More than 3 Months	36%	46%	52%
Total	100%	100%	100%
Average Planning Time in Days	106 days	124 days	136 days
Advance Airline Reservations			
7 days or less	9%	10%	8%
8 - 30 days	35%	29%	22%
31 - 60 days	19%	19%	20%
61 - 90 days	12%	10%	11%
91 - 120 days	8%	10%	12%
121 - 180 days	10%	17%	20%
6 Months or More	8%	6%	7%
Total	100%	100%	100%
Average Booking in Days	74 days	79 days	91 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from France (n = 392)	Leisure Visitors from France (n = 293)
Means of Booking Air Trip**			
Travel Agency Office	29%	21%	21%
Airlines Directly	29%	33%	36%
Internet Booking Service	27%	31%	35%
Corporate Travel Department	12%	11%	2%
Tour Operator/Travel Club	10%	9%	10%
Other	1%	<1%	<1%
Main Factor in Selecting Airline			
Airfare	31%	30%	32%
Non-Stop Flights	19%	25%	28%
Convenient Schedule	14%	6%	6%
Previous Good Experience	8%	7%	5%
Mileage Bonus/Frequent Flyer Program	6%	3%	2%
Safety Reputation	6%	8%	7%
Loyalty to Carrier	3%	6%	7%
In-flight Service Reputation	3%	4%	5%
Employer policy	2%	4%	1%
On-time Reputation	2%	2%	2%
Other	5%	6%	7%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	88%	93%
Premium Economy	9%	9%	7%
Executive/Business	8%	3%	<1%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	20%	24%
No	85%	80%	76%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	9%	11%
Bus/Coach	6%	10%	14%
Guided Tours	6%	9%	12%
Meals	6%	12%	15%
Rental Car	5%	7%	7%
Tour Guide for Entire Trip	4%	11%	15%
Airfare and Accommodation Only	2%	2%	2%
Cruise	2%	2%	3%
Recreation	2%	2%	3%

* 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from France (n = 392)	Leisure Visitors from France (n = 293)
Travel Companions**			
Traveling Alone	59%	59%	47%
Spouse/Partner	22%	23%	30%
Family/Relatives	15%	15%	20%
Friends	6%	4%	6%
Business Associates	3%	1%	<1%
Tour Group	1%	2%	2%
Average Travel Party Size	1.7	1.7	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	79%	75%
Private Home	30%	26%	31%
Other	6%	5%	7%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	20.3 nights	17.8 nights
Mean Nights in California	12.2 nights	11.0 nights	10.6 nights
% of California Nights	52%	54%	61%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	32%	34%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.5 trips
Average Number of States Visited	2.1 states	2.3 states	2.3 states
Average Number of Destinations Visited	3.1 dest.	3.7 dest.	4.0 dest.
Places Visited in the U.S.**			
Los Angeles	62%	66%	70%
San Francisco	44%	55%	59%
Las Vegas	29%	44%	52%
New York City	16%	9%	7%
San Diego	14%	8%	7%
Anaheim-Santa Ana	8%	3%	2%
Flagstaff-Grand Canyon-Sedona	7%	24%	30%
San Jose	6%	6%	4%
Monterey-Salinas	5%	5%	6%
DC Metro Area	4%	2%	1%
Riverside/San Bernardino	4%	4%	4%
Santa Barbara	4%	6%	6%
Chicago	3%	2%	1%
Oahu	3%	<1%	<1%
Seattle	3%	<1%	<1%
Sacramento	3%	1%	2%
Miami	3%	2%	1%

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

**Characteristics of Travelers from France to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from France (n = 392)	Leisure Visitors from France (n = 293)
Activities Experienced While in the U.S.**			
Shopping	89%	87%	89%
Sightseeing	83%	81%	86%
National Parks/Monuments	52%	66%	75%
Small Towns/Countryside	44%	50%	52%
Experience Fine Dining	43%	47%	46%
Amusement/Theme Parks	40%	40%	46%
Historical Locations	35%	35%	38%
Guided Tours	33%	30%	34%
Art Gallery/Museums	31%	28%	27%
Casino/Gamble	24%	32%	36%
Concert/Play/Musical	21%	17%	18%
Cultural/Ethnic Heritage Sites	20%	17%	20%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	34%	30%
Rented Auto	44%	51%	55%
Auto, Private or Company	38%	31%	29%
City Subway/Tram/Bus	31%	35%	36%
Taxicab/Limousine	31%	27%	21%
Bus between Cities	19%	22%	24%
Ferry/River Taxi/Srt. Scenic Cruise	10%	9%	10%
Railroad between Cities	7%	4%	4%
Rented Bicycle/Motorcycle/Moped	5%	7%	8%
Cruise Ship/River Boat 1+ Nights	4%	4%	5%
Motor Home/Camper	2%	1%	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$3,257	\$2,547
Per Visitor Per Day (CA)	\$153	\$160	\$143
Per Visitor/Trip (California)	\$1,872	\$1,765	\$1,516
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	30.6%	27.5%
Air Transportation in the U.S.	6.6%	7.0%	5.1%
Entertainment	12.5%	16.9%	14.5%
Food/Beverages	18.1%	19.5%	24.0%
Gifts/Souvenirs	21.1%	14.4%	18.0%
Ground Transportation in the U.S.	6.2%	5.7%	6.7%
Other	4.9%	5.8%	4.2%

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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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from France (n = 392)	Leisure Visitors from France (n = 293)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	37%	34%
Cash from Home/Travelers Checks	27%	29%	34%
Cash Adv./Withdrawal Using Credit Card	18%	27%	24%
Cash Adv./Withdrawal Using Debit Card	6%	4%	4%
Purchases Using Debit Card	6%	4%	4%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	41 years	43 years
Average Age - Females	38 years	36 years	38 years
Occupation			
Mgmt., Business, Science & Arts	44%	41%	34%
Service Occupations	11%	12%	14%
Student	11%	14%	13%
Sales and Office	11%	9%	10%
Retired	8%	12%	14%
Homemaker	4%	1%	1%
Prod., Trans., & Material Moving	4%	5%	5%
Nat. Res., Const., & Maintenance	3%	2%	3%
Military/Government	2%	2%	2%
Other	2%	3%	2%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	13%	16%
\$20,000 - \$39,999	13%	15%	14%
\$40,000 - \$59,999	14%	16%	15%
\$60,000 - \$79,999	11%	16%	17%
\$80,000 - \$99,999	10%	16%	19%
\$100,000 - \$119,999	9%	6%	7%
\$120,000 - \$139,999	6%	9%	8%
\$140,000 - \$159,999	4%	1%	1%
\$160,000 - \$179,999	3%	3%	2%
\$180,000 - \$199,999	2%	1%	-
\$200,000 and over	11%	5%	3%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$77,470	\$70,123

* 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."