

CHARACTERISTICS OF TRAVELERS FROM THE MIDDLE EAST TO CALIFORNIA - 2014

The Middle East was one of California’s large overseas markets with approximately 274,000 visitors to California in 2014. Collectively visitors from the Middle East spent approximately \$645 million in California.

Middle Eastern visitors to California during 2014 reported spending \$155 per day during a 15.2 night average stay or approximately \$2,349 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

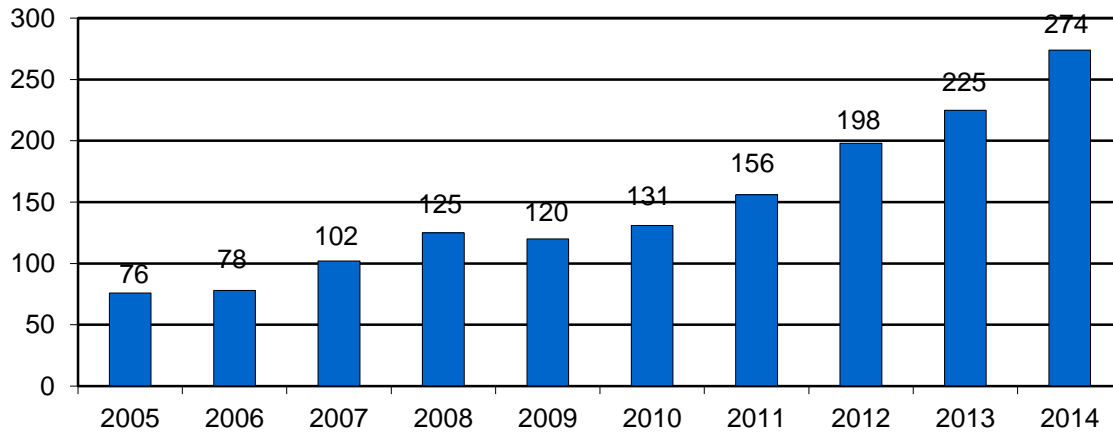
Visitors From The Middle East

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2004	502,170	20.1%	101,000
2005	527,361	14.4%	76,000
2006	552,730	14.1%	78,000
2007	619,818	16.5%	102,000
2008	680,974	18.4%	125,000
2009	665,942	18.0%	120,000
2010	735,549	17.8%	131,000
2011	810,688	19.2%	156,000
2012	925,398	21.4%	198,000
2013	1,058,122	21.3%	225,000
2014	1,225,120	22.4%	274,000

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 The Middle East to CA, 2005-2014 (in 000s)



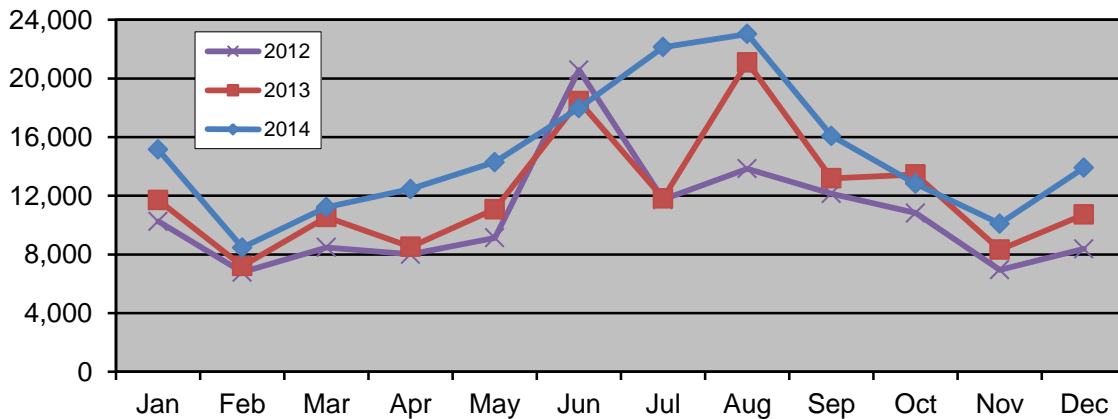
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office, Revised by Tourism Economics for Visit California (October, 2015).

Visitation from the Middle East peaked in 2000 at 136,000, but then dropped to a low of 62,000 in 2003 (post 9-11). The volume of Middle Eastern visitors to California has experienced strong recovery since 2005 and has risen to a high of 274,000 visitors in 2014.

Middle Eastern Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from the Middle East to California were similar in most of 2014 compared with 2013 and 2012. There was, however, a large upswing during the month of July 2014. Middle Eastern resident arrivals at California ports-of-entry peaked in July and August 2014. The lowest volumes of arrivals were recorded in February and November.

**Residents of The Middle East
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 the Middle East 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 the Middle East are more likely to:

- Travel to California to visit friends/relatives
- Plan and book their trip using the airlines
- Plan their trip using a personal recommendation
- Have a decidedly shorter trip planning and advance airline booking horizon
- Travel alone
- Have a longer stay in the U.S. and California
- Visit New York City while in the U.S.
- Visit amusement/theme parks while in the U.S.
- Make use of air travel between cities as a means of transportation while in the U.S.
- Spend per visitor per trip in the U.S. as well as in CA
- Be in management, business, science & arts occupations
- Have a lower household income

Conversely, visitors from the Middle East are less likely to:

- Make use of a pre-paid package
- Visit San Francisco or Las Vegas while in the U.S.
- Visit National Parks/monuments or historical locations while in the U.S.
- Go on guided tours
- Make use of taxicab/limousines as a means of transportation while in the U.S.
- Be in service occupations

Characteristics of Travelers from the Middle East to California, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Middle East (n = 221)	Leisure Visitors from the Middle East (n = 120)
Primary Purpose of Trip			
Vacation/Holidays	54%	49%	70%
Visit Friends/Relatives	18%	22%	31%
Business	13%	13%	-
Convention/Conference	8%	6%	-
Other Purpose	7%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	66%	84%
Visit Friends/Relatives	34%	45%	55%
Business	18%	21%	7%
Convention/Conference	12%	10%	5%
Sources Used to Plan Trip**			
Airline	43%	56%	61%
Online Travel Agency	32%	40%	47%
Travel Agency Office	25%	17%	11%
Personal Recommendation	29%	38%	41%
Travel Guide	15%	10%	15%
Corporate Travel Department	12%	14%	9%
Tour Operator/Travel Club	10%	5%	5%
National/State/City Travel Office	8%	10%	11%
Advance Planning for Trip			
7 days or less	5%	5%	3%
8 - 30 days	25%	38%	28%
31 - 60 days	19%	18%	16%
61 - 90 days	15%	19%	22%
More than 3 Months	36%	21%	31%
Total	100%	100%	100%
Average Planning Time in Days	106 days	75 days	93 days
Advance Airline Reservations			
7 days or less	9%	15%	9%
8 - 30 days	35%	42%	37%
31 - 60 days	19%	17%	19%
61 - 90 days	12%	13%	18%
91 - 120 days	8%	6%	9%
121 - 180 days	10%	5%	5%
6 Months or More	8%	2%	3%
Total	100%	100%	100%
Average Booking in Days	74 days	50 days	61 days

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

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

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

**Characteristics of Travelers from the Middle East to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Middle East (n = 221)	Leisure Visitors from the Middle East (n = 120)
Means of Booking Air Trip**			
Travel Agency Office	29%	22%	16%
Airlines Directly	29%	39%	39%
Internet Booking Service	27%	32%	39%
Corporate Travel Department	12%	17%	14%
Tour Operator/Travel Club	10%	4%	5%
Other	1%	2%	2%
Main Factor in Selecting Airline			
Airfare	31%	33%	30%
Non-Stop Flights	19%	11%	13%
Convenient Schedule	14%	16%	17%
Mileage Bonus/Frequent Flyer Program	8%	6%	8%
Previous Good Experience	6%	8%	2%
Safety Reputation	6%	2%	3%
Loyalty to Carrier	3%	1%	2%
Employer policy	3%	4%	2%
In-flight Service Reputation	2%	5%	5%
On-time Reputation	2%	2%	4%
Other	5%	11%	15%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	82%	87%
Executive/Business	9%	8%	5%
Premium Economy	8%	8%	7%
First Class	1%	2%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	4%	3%
No	85%	96%	97%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	7%	2%	1%
Attractions/Events/Entertainment	6%	1%	2%
Bus/Coach	6%	-	-
Cruise	6%	1%	2%
Guided Tours	5%	<1%	-
Meals	4%	1%	2%
Recreation	2%	<1%	-
Rental Car	2%	2%	2%
Tour Guide for Entire Trip	2%	-	-

* 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 the Middle East to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Middle East (n = 221)	Leisure Visitors from the Middle East (n = 120)
Travel Companions**			
Traveling Alone	59%	74%	63%
Spouse/Partner	22%	14%	23%
Family/Relatives	15%	12%	19%
Friends	6%	3%	3%
Business Associates	3%	1%	-
Tour Group	1%	-	-
Average Travel Party Size	1.7	1.5	1.7
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	71%	70%
Private Home	30%	36%	45%
Other	6%	8%	6%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	29.8 nights	24.7 nights
Mean Nights in California	12.2 nights	15.2 nights	15.4 nights
% of California Nights	52%	51%	62%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	21%	21%
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	2.1 states	2.2 states
Average Number of Destinations Visited	3.1 dest.	3.1 dest.	3.4 dest.
Places Visited in the U.S.**			
Los Angeles	62%	64%	66%
San Francisco	44%	31%	35%
Las Vegas	29%	20%	23%
New York City	16%	34%	40%
San Diego	14%	21%	22%
Anaheim-Santa Ana	8%	15%	16%
Flagstaff-Grand Canyon-Sedona	7%	2%	3%
San Jose	6%	6%	5%
DC Metro Area	5%	3%	5%
Monterey-Salinas	4%	9%	13%
Oahu	4%	<1%	1%
Santa Barbara	4%	4%	6%
Riverside/San Bernardino	3%	1%	2%
Chicago	3%	6%	3%
Seattle	3%	4%	5%
Sacramento	3%	1%	-
Miami	3%	3%	3%

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

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

**Characteristics of Travelers from the Middle East to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Middle East (n = 221)	Leisure Visitors from the Middle East (n = 120)
Activities Experienced While in the U.S.**			
Shopping	89%	96%	96%
Sightseeing	83%	82%	88%
National Parks/Monuments	52%	43%	52%
Experience Fine Dining	44%	47%	53%
Small Towns/Countryside	43%	51%	52%
Amusement/Theme Parks	40%	54%	61%
Historical Locations	35%	25%	29%
Guided Tours	33%	27%	31%
Art Gallery/Museums	31%	30%	35%
Casino/Gamble	24%	21%	24%
Cultural/Ethnic Heritage Sites	21%	29%	20%
Concert/Play/Musical	20%	29%	31%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	58%	58%
Rented Auto	44%	50%	51%
Auto, Private or Company	38%	40%	47%
City Subway/Tram/Bus	31%	25%	27%
Taxicab/Limousine	31%	22%	18%
Bus between Cities	19%	22%	22%
Ferry/River Taxi/Srt. Scenic Cruise	10%	9%	12%
Railroad between Cities	7%	11%	11%
Rented Bicycle/Motorcycle/Moped	5%	5%	4%
Cruise Ship/River Boat 1+ Nights	4%	4%	3%
Motor Home/Camper	2%	3%	3%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$4,750	\$9,681
Per Visitor Per Day (CA)	\$153	\$155	\$325
Per Visitor/Trip (California)	\$1,872	\$2,349	\$4,938
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	31.3%	29.5%
Air Transportation in the U.S.	6.6%	7.7%	7.9%
Entertainment	12.5%	16.7%	18.7%
Food/Beverages	18.1%	16.7%	17.9%
Gifts/Souvenirs	21.1%	18.3%	16.7%
Ground Transportation in the U.S.	6.2%	5.6%	6.2%
Other	4.9%	3.7%	3.0%

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** Multiple response question. Table may add 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 the Middle East to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Middle East (n = 221)	Leisure Visitors from the Middle East (n = 120)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	48%	46%
Cash from Home/Travelers Checks	27%	20%	22%
Cash Adv./Withdrawal Using Credit Card	18%	22%	19%
Cash Adv./Withdrawal Using Debit Card	6%	4%	5%
Purchases Using Debit Card	6%	7%	8%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	38 years	37 years
Average Age - Females	38 years	38 years	39 years
Occupation			
Mgmt., Business, Science & Arts	44%	59%	54%
Service Occupations	11%	4%	5%
Student	11%	18%	20%
Sales and Office	11%	2%	3%
Retired	8%	4%	6%
Homemaker	4%	3%	4%
Prod., Trans., & Material Moving	4%	3%	1%
Military/Government	3%	3%	3%
Nat. Res., Const., & Maintenance	2%	3%	5%
Other	2%	<1%	-
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	27%	26%
\$20,000 - \$39,999	13%	28%	38%
\$40,000 - \$59,999	14%	4%	2%
\$60,000 - \$79,999	11%	11%	8%
\$80,000 - \$99,999	10%	5%	6%
\$100,000 - \$119,999	9%	2%	2%
\$120,000 - \$139,999	6%	5%	3%
\$140,000 - \$159,999	4%	5%	6%
\$160,000 - \$179,999	3%	3%	-
\$180,000 - \$199,999	2%	<1%	<1%
\$200,000 and over	11%	10%	9%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$80,974	\$72,510

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