

CHARACTERISTICS OF TRAVELERS FROM THE MIDDLE EAST TO CALIFORNIA - 2015

The Middle East region generated approximately 286,000 visitors to California in 2015, up from 274,000 in 2014. Collectively visitors from the Middle East spent approximately \$681 million in California in 2015, up from \$645 in 2014.

Middle Eastern visitors to California during 2015 reported spending \$122 per day during a 19.5 night average stay or approximately \$2,379 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors From The Middle East

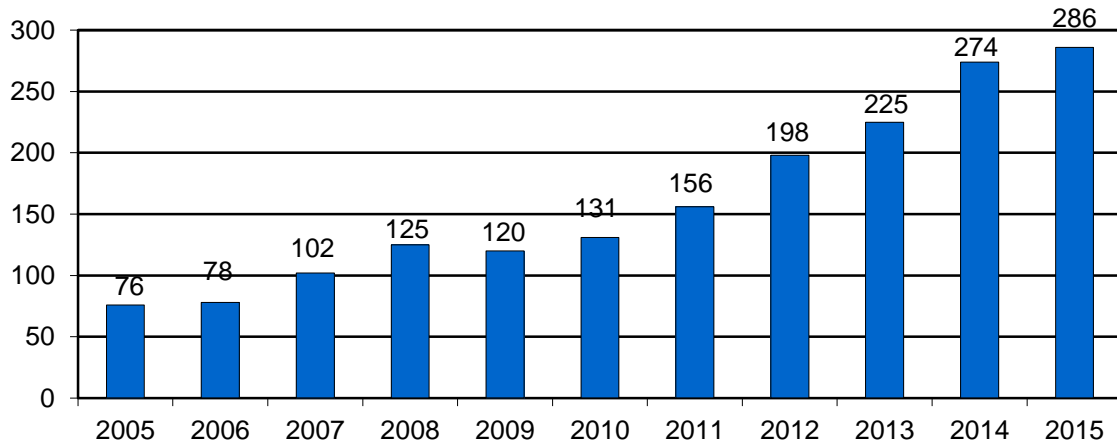
Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	527,361	14.4%	76,000
2006	552,730	14.1%	78,000
2007	619,818	16.5%	102,000
2008	680,974	18.4%	125,000
2009	665,942	18.0%	120,000
2010	735,549	17.8%	131,000
2011	810,688	19.2%	156,000
2012	925,398	21.4%	198,000
2013	1,058,122	21.3%	225,000
2014 ³	1,225,120	22.4%	274,000
2015 ³	1,006,500	28.5%	286,000

1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

Number of Visitors from The Middle East to CA, 2005-2015 (in 000s)



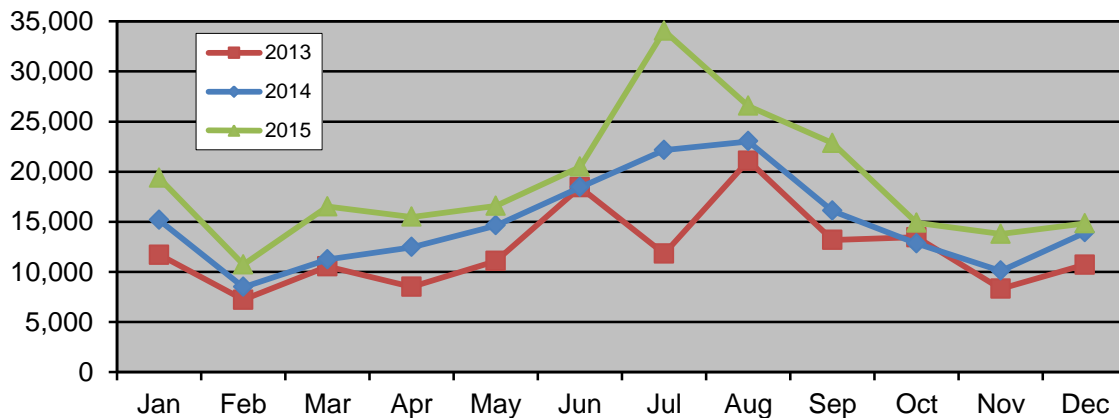
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,
Revised by Tourism Economics for Visit California (October, 2015).

Visitation to California from the Middle East peaked in 1998 at 186,000, 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 increased steadily to a high of 286,000 visitors in 2015.

Middle Eastern Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from the Middle East to California were mostly higher in 2015 compared with 2014 and 2013. In addition, there was a large upswing during the month of July 2015. Middle Eastern resident arrivals at California ports-of-entry peaked during this month. The lowest volumes of arrivals in 2015 were recorded in February and November.

**Residents of The Middle East
Monthly Port of Entry Arrivals to CA
2013-2015**



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 table on the following pages. 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 an online travel agency/internet booking service
- Have a decidedly shorter trip planning and advance airline booking horizon
- Travel alone
- Stay in a private home
- Have a longer stay in the U.S. and California
- Visit New York City and Los Angeles while in the U.S.
- Visit amusement/theme parks or experience fine dining while in the U.S.
- Make use of air travel between cities as a means of transportation while in the U.S.
- Spend more per visitor per trip in the U.S. as well as in CA
- Spend a higher percentage of their travel dollar on entertainment as well as gifts/souvenirs
- Have a lower household income

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

- Stay in a hotel/motel
- Go sightseeing
- Spend their travel dollars on accommodations or food/beverages

Characteristics of Travelers from the Middle East to California, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Middle East (n = 255)	Leisure Visitors from the Middle East (n = 142)
Primary Purpose of Trip			
Vacation/Holidays	54%	42%	62%
Visit Friends/Relatives	18%	26%	38%
Business	13%	10%	-
Convention/Conference	9%	9%	-
Other Purpose	6%	14%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	64%	77%
Visit Friends/Relatives	34%	45%	52%
Business	17%	14%	-
Convention/Conference	12%	12%	-
Sources Used to Plan Trip**			
Airline	43%	47%	47%
Online Travel Agency	34%	44%	42%
Personal Recommendation	29%	30%	30%
Travel Agency Office	23%	27%	23%
Travel Guide	15%	16%	15%
Corporate Travel Department	12%	17%	9%
Tour Operator/Travel Club	9%	14%	9%
National/State/City Travel Office	7%	10%	8%
Advance Planning for Trip			
7 days or less	5%	11%	9%
8 - 30 days	24%	36%	32%
31 - 60 days	19%	13%	15%
61 - 90 days	15%	17%	23%
More than 3 Months	38%	23%	21%
Total	100%	100%	100%
Average Planning Time in Days	108 days	76 days	78 days
Advance Airline Reservations			
7 days or less	8%	21%	17%
8 - 30 days	33%	37%	38%
31 - 60 days	20%	19%	20%
61 - 90 days	13%	13%	13%
91 - 120 days	9%	2%	4%
121 - 180 days	10%	7%	8%
6 Months or More	8%	2%	1%
Total	100%	100%	100%
Average Booking in Days	76 days	49 days	51 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Middle East (n = 255)	Leisure Visitors from the Middle East (n = 142)
Means of Booking Air Trip**			
Airlines Directly	31%	33%	36%
Internet Booking Service	29%	37%	39%
Travel Agency Office	26%	30%	30%
Corporate Travel Department	12%	9%	2%
Tour Operator/Travel Club	9%	8%	8%
Other	1%	2%	1%
Main Factor in Selecting Airline			
Airfare	29%	31%	30%
Non-Stop Flights	17%	17%	18%
Convenient Schedule	15%	21%	23%
Previous Good Experience	9%	9%	12%
Mileage Bonus/Frequent Flyer Program	8%	<1%	-
Safety Reputation	9%	3%	5%
Loyalty to Carrier	3%	6%	7%
In-flight Service Reputation	3%	<1%	-
Employer policy	3%	3%	1%
On-time Reputation	2%	1%	<1%
Other	3%	8%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	83%	87%
Premium Economy	10%	9%	7%
Executive/Business	8%	7%	5%
First Class	1%	2%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	8%	7%
No	86%	92%	94%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	1%	1%
Meals	6%	3%	<1%
Bus/Coach	6%	3%	1%
Guided Tours	6%	3%	1%
Rental Car	4%	2%	1%
Tour Guide for Entire Trip	5%	2%	-
Airfare and Accommodation Only	3%	2%	3%
Cruise	2%	-	-
Recreation	1%	-	-

* 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Middle East (n = 255)	Leisure Visitors from the Middle East (n = 142)
Travel Companions**			
Traveling Alone	59%	72%	58%
Spouse/Partner	22%	14%	22%
Family/Relatives	15%	10%	15%
Friends	6%	4%	8%
Business Associates	4%	1%	-
Tour Group	1%	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	73%	56%	50%
Private Home	32%	49%	56%
Other	6%	10%	8%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	33.9 nights	27.4 nights
Mean Nights in California	12.6 nights	19.5 nights	17.2 nights
% of California Nights	52%	58%	63%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	33%	35%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.8 trips
Average Number of States Visited	2.0 states	2.2 states	2.1 states
Average Number of Destinations Visited	3.1 dest.	3.1 dest.	3.2 dest.
Places Visited in the U.S.**			
Los Angeles	60%	70%	71%
San Francisco	45%	39%	32%
Las Vegas	30%	25%	27%
New York City	15%	27%	30%
San Diego	14%	19%	16%
Anaheim-Santa Ana	8%	6%	7%
Flagstaff-Grand Canyon-Sedona	7%	3%	3%
San Jose	6%	6%	4%
DC Metro Area	5%	7%	6%
Monterey-Salinas	5%	1%	1%
Santa Barbara	4%	2%	4%
Riverside/San Bernardino	4%	2%	2%
Oahu	3%	<1%	<1%
Seattle	3%	3%	<1%
Chicago	3%	3%	5%
Miami	2%	5%	5%
Sacramento	2%	4%	4%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Middle East (n = 255)	Leisure Visitors from the Middle East (n = 142)
Activities Experienced While in the U.S.**			
Shopping	87%	88%	91%
Sightseeing	83%	67%	65%
National Parks/Monuments	51%	49%	50%
Small Towns/Countryside	42%	47%	54%
Experience Fine Dining	40%	52%	52%
Amusement/Theme Parks	39%	50%	56%
Historical Locations	34%	28%	25%
Guided Tours	31%	29%	24%
Art Gallery/Museums	33%	36%	33%
Casino/Gamble	24%	24%	28%
Cultural/Ethnic Heritage Sites	20%	21%	24%
Concert/Play/Musical	20%	25%	26%
Transportation While in the U.S.**			
Rented Auto	44%	45%	43%
Air Travel between U.S. Cities	44%	54%	52%
Auto, Private or Company	37%	44%	49%
City Subway/Tram/Bus	31%	31%	29%
Taxicab/Limousine	31%	26%	22%
Bus between Cities	19%	15%	12%
Ferry/River Taxi/Srt. Scenic Cruise	10%	7%	5%
Railroad between Cities	7%	7%	6%
Rented Bicycle/Motorcycle/Moped	5%	8%	9%
Cruise Ship/River Boat 1+ Nights	4%	2%	1%
Motor Home/Camper	2%	2%	3%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$4,809	\$6,278
Per Visitor Per Day (CA)	\$157	\$122	\$229
Per Visitor/Trip (California)	\$1,979	\$2,379	\$3,941
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	23.1%	21.2%
Air Transportation in the U.S.	5.9%	6.3%	7.3%
Entertainment	12.9%	19.0%	21.8%
Food/Beverages	19.9%	15.0%	14.6%
Gifts/Souvenirs	19.2%	24.4%	21.3%
Ground Transportation in the U.S.	6.3%	8.9%	9.9%
Other	4.2%	3.3%	3.9%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Middle East (n = 255)	Leisure Visitors from the Middle East (n = 142)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	43%	40%
Cash from Home/Travelers Checks	27%	28%	33%
Cash Adv./Withdrawal Using Credit Card	18%	22%	21%
Cash Adv./Withdrawal Using Debit Card	6%	4%	4%
Purchases Using Debit Card	6%	3%	2%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	37 years	38 years
Average Age - Females	38 years	36 years	37 years
Occupation			
Mgmt., Business, Science & Arts	46%	52%	54%
Service Occupations	11%	8%	9%
Student	12%	19%	11%
Sales and Office	11%	6%	6%
Retired	8%	3%	5%
Homemaker	4%	4%	6%
Prod., Trans., & Material Moving	3%	2%	3%
Military/Government	3%	1%	<1%
Nat. Res., Const., & Maintenance	3%	2%	2%
Other	1%	3%	4%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	35%	33%
\$20,000 - \$39,999	15%	15%	20%
\$40,000 - \$59,999	15%	8%	5%
\$60,000 - \$79,999	14%	9%	10%
\$80,000 - \$99,999	10%	2%	3%
\$100,000 - \$119,999	10%	9%	15%
\$120,000 - \$139,999	4%	4%	1%
\$140,000 - \$159,999	4%	5%	<1%
\$160,000 - \$179,999	3%	<1%	-
\$180,000 - \$199,999	1%	3%	6%
\$200,000 and over	10%	9%	8%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$71,677	\$68,505

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