

## CHARACTERISTICS OF TRAVELERS FROM THE MIDDLE EAST TO CALIFORNIA - 2013

The Middle East was one of California’s large overseas markets with approximately 225,000 visitors to California in 2013. Collectively visitors from the Middle East spent approximately \$561 million in California.

Middle Eastern visitors to California during 2013 reported spending \$136 per day during an 18.3 night average stay or approximately \$2,491 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

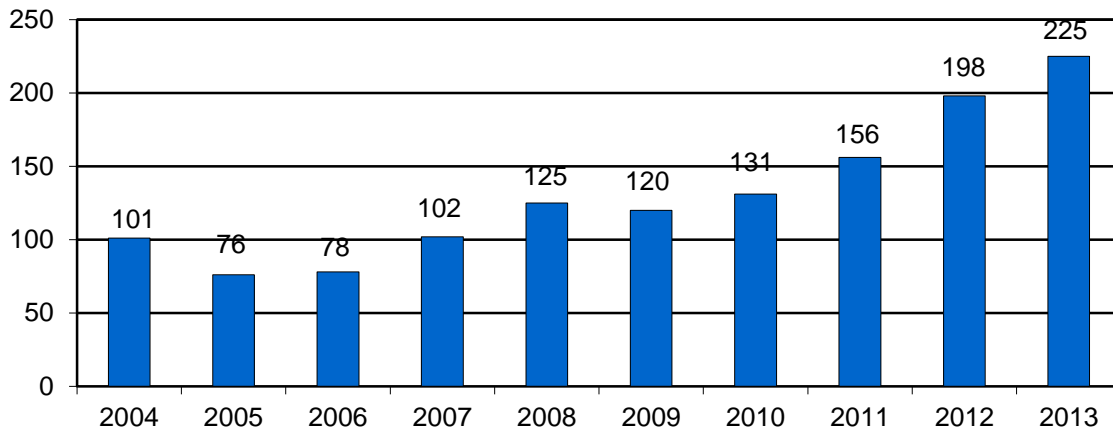
### Visitors From The Middle East

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2003	447,112	13.8%	62,000
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

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, 2004-2013 (in 000s)



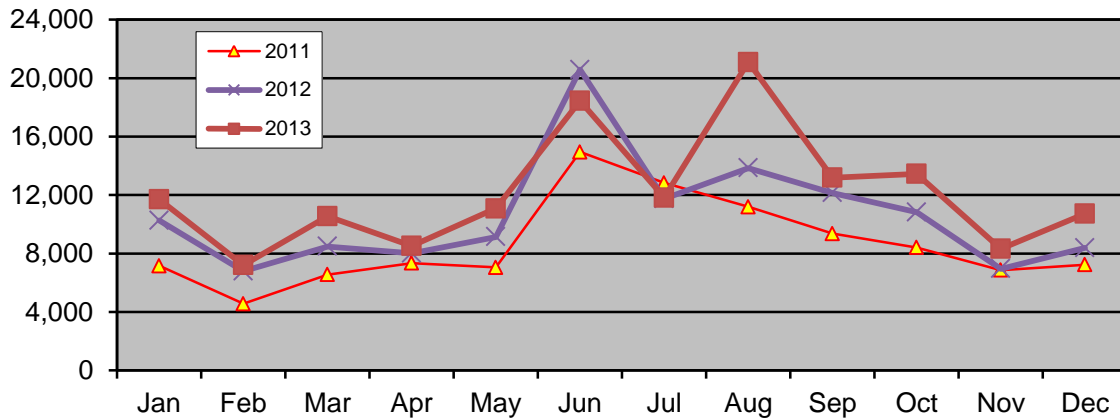
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

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 225,000 visitors in 2013.

### 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 2013 compared with 2012 and to a lesser extent, 2011. There was, however, a large upswing during the month of August 2013. Middle Eastern resident arrivals at California ports-of-entry peaked in June and August 2013. The lowest volumes of arrivals were recorded in February and November.

**Residents of The Middle East  
Monthly Port of Entry Arrivals to CA  
2011-2013**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

## 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
- Have a decidedly shorter trip planning and advance airline booking horizon
- Visit New York City while in the U.S.
- Make use of air travel between cities as a means of transportation while in the U.S.
- Have a lower household income
- Spend per visitor per trip in the U.S. as well as in CA

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

- Specify their main purpose of travel to California was for vacation/holidays
- Go on guided tours
- Be in service occupations

### Characteristics of Travelers from the Middle East to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the Middle East (n = 232)	Leisure Visitors from the Middle East (n = 136)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	52%	42%	59%
Visit Friends/Relatives	17%	30%	41%
Business	15%	8%	-
Convention/Conference	9%	12%	-
Other Purpose	8%	8%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	64%	68%	81%
Visit Friends/Relatives	32%	45%	50%
Business	20%	14%	1%
Convention/Conference	12%	17%	4%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	48%	46%
Online Travel Agency	31%	40%	40%
Travel Agency Office	26%	29%	24%
Personal Recommendation	26%	35%	37%
Travel Guide	15%	15%	15%
Corporate Travel Department	14%	18%	13%
Tour Operator/Travel Club	9%	11%	12%
National/State/City Travel Office	8%	14%	13%
<b>Advance Planning for Trip</b>			
7 days or less	5%	8%	7%
8 - 30 days	27%	36%	33%
31 - 60 days	17%	25%	27%
61 - 90 days	14%	15%	18%
More than 3 Months	36%	16%	16%
Total	100%	100%	100%
Average Planning Time in Days	105 days	64 days	68 days
<b>Advance Airline Reservations</b>			
7 days or less	10%	15%	13%
8 - 30 days	35%	41%	40%
31 - 60 days	17%	23%	29%
61 - 90 days	13%	12%	11%
91 - 120 days	8%	5%	2%
121 - 180 days	9%	4%	5%
6 Months or More	7%	-	-
Total	100%	100%	100%
Average Booking in Days	72 days	42 days	43 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  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the Middle East (n = 232)	Leisure Visitors from the Middle East (n = 136)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	31%	35%	34%
Airlines Directly	28%	37%	39%
Internet Booking Service	24%	29%	29%
Corporate Travel Department	15%	12%	6%
Tour Operator/Travel Club	9%	6%	8%
Other	2%	5%	5%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	25%	27%
Non-Stop Flights	17%	18%	15%
Convenient Schedule	15%	16%	11%
Mileage Bonus/Frequent Flyer Program	9%	4%	5%
Previous Good Experience	9%	6%	8%
Safety Reputation	6%	6%	9%
Loyalty to Carrier	4%	2%	2%
Employer policy	3%	3%	-
In-flight Service Reputation	3%	10%	10%
On-time Reputation	2%	5%	5%
Other	4%	6%	9%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	79%	79%	87%
Executive/Business	10%	8%	2%
Premium Economy	10%	14%	11%
First Class	1%	<1%	<1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	10%	10%
No	85%	91%	90%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	3%	1%	1%
Attractions/Events/Entertainment	7%	4%	5%
Bus/Coach	7%	2%	1%
Cruise	2%	1%	2%
Guided Tours	6%	1%	1%
Meals	6%	3%	2%
Recreation	1%	<1%	1%
Rental Car	5%	5%	5%
Tour Guide for Entire Trip	4%	1%	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  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the Middle East (n = 232)	Leisure Visitors from the Middle East (n = 136)
<b>Travel Companions**</b>			
Traveling Alone	61%	69%	59%
Spouse/Partner	21%	13%	19%
Family/Relatives	13%	13%	18%
Friends	6%	6%	7%
Business Associates	4%	1%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.6	1.5	1.7
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	77%	72%
Private Home	27%	33%	37%
Other	6%	3%	3%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.5 nights	28.3 nights	25.5 nights
Mean Nights in California	12.2 nights	18.3 nights	14.6 nights
% of California Nights	54%	65%	57%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	33%	36%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.5 trips
<b>Average Number of States Visited</b>	2.0 states	2.2 states	2.4 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	3.1 dest.	3.5 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	59%	66%	75%
San Francisco	47%	39%	39%
Las Vegas	30%	37%	45%
New York City	16%	31%	35%
San Diego	13%	18%	19%
Anaheim-Santa Ana	8%	10%	11%
Flagstaff-Grand Canyon-Sedona	7%	3%	4%
San Jose	6%	9%	3%
DC Metro Area	4%	4%	5%
Monterey-Salinas	4%	1%	1%
Oahu	4%	2%	2%
Santa Barbara	3%	4%	2%
Riverside/San Bernardino	3%	3%	5%
Chicago	3%	<1%	-
Seattle	3%	6%	8%
Sacramento	3%	6%	7%
Miami	3%	5%	8%

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**Characteristics of Travelers from the Middle East to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the Middle East (n = 232)	Leisure Visitors from the Middle East (n = 136)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	93%	95%
Sightseeing	84%	81%	89%
National Parks/Monuments	49%	45%	50%
Experience Fine Dining	43%	48%	47%
Small Towns/Countryside	41%	44%	48%
Amusement/Theme Parks	38%	43%	49%
Historical Locations	37%	31%	30%
Guided Tours	33%	21%	20%
Art Gallery/Museums	30%	36%	39%
Casino/Gamble	25%	25%	30%
Cultural/Ethnic Heritage Sites	21%	22%	26%
Concert/Play/Musical	20%	26%	30%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	46%	67%	69%
Rented Auto	43%	48%	51%
Auto, Private or Company	37%	43%	46%
City Subway/Tram/Bus	33%	32%	33%
Taxicab/Limousine	33%	29%	27%
Bus between Cities	18%	14%	11%
Ferry/River Taxi/Srt. Scenic Cruise	12%	9%	9%
Railroad between Cities	8%	6%	7%
Rented Bicycle/Motorcycle/Moped	5%	7%	7%
Cruise Ship/River Boat 1+ Nights	4%	5%	6%
Motor Home/Camper	2%	<1%	<1%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$5,036	\$4,427
Per Visitor Per Day (CA)	\$159	\$136	\$174
Per Visitor/Trip (California)	\$1,940	\$2,491	\$2,535
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	29.1%	28.3%	29.8%
Air Transportation in the U.S.	6.9%	10.7%	13.0%
Entertainment	12.2%	8.2%	8.2%
Food/Beverages	17.8%	15.9%	13.5%
Gifts/Souvenirs	21.9%	25.5%	24.2%
Ground Transportation in the U.S.	5.6%	6.5%	5.8%
Other	6.3%	4.8%	5.4%

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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  
(2013 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 6,744)</b>	<b>All Visitors from the Middle East (n = 232)</b>	<b>Leisure Visitors from the Middle East (n = 136)</b>
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	46%	42%
Cash from Home/Travelers Checks	26%	26%	33%
Cash Adv./Withdrawal Using Credit Card	18%	22%	22%
Cash Adv./Withdrawal Using Debit Card	7%	2%	1%
Purchases Using Debit Card	6%	5%	3%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	42 years	43 years	43 years
Average Age - Females	39 years	32 years	32 years
<b>Occupation</b>			
Mgmt., Business, Science, & Arts	44%	51%	41%
Service Occupations	11%	1%	1%
Student	11%	13%	16%
Sales and Office	10%	3%	2%
Retired	8%	6%	7%
Homemaker	5%	5%	7%
Prod., Trans., & Material Moving	4%	4%	3%
Military/Government	4%	7%	8%
Nat. Res., Const., & Maintenance	3%	5%	8%
Other	2%	5%	8%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	40%	50%
\$20,000 - \$39,999	14%	15%	13%
\$40,000 - \$59,999	14%	6%	5%
\$60,000 - \$79,999	12%	10%	6%
\$80,000 - \$99,999	10%	1%	-
\$100,000 - \$119,999	8%	4%	4%
\$120,000 - \$139,999	6%	7%	7%
\$140,000 - \$159,999	5%	4%	3%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	2%	-
\$200,000 and over	12%	10%	12%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$73,869	\$63,617

\* 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."