

## CHARACTERISTICS OF TRAVELERS FROM FRANCE TO CALIFORNIA – 2009

France was California's sixth largest overseas market with approximately 275,000 visitors to California in 2009. Collectively visitors from France spent approximately \$255 million in California.

French visitors to California during 2009 reported spending \$108 per day during an 8.6 night average stay or approximately \$929 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

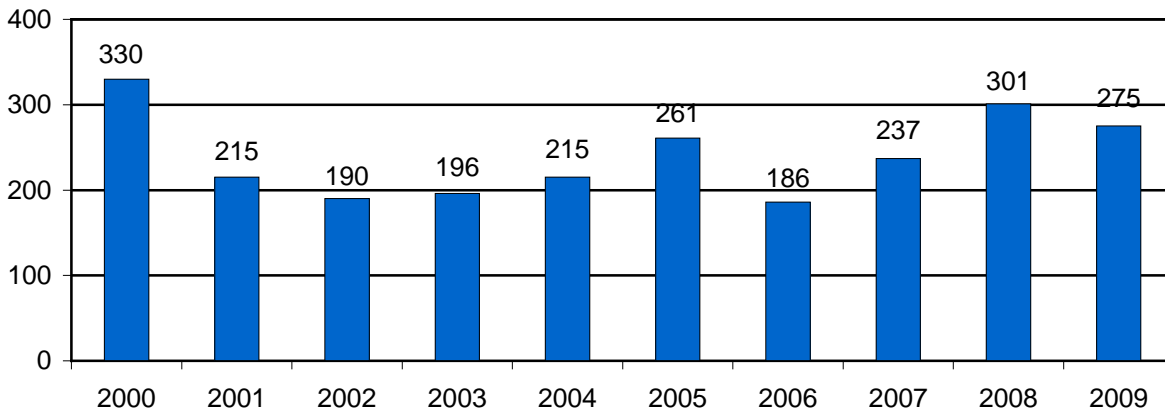
### Visitors From France

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
1999	1,059,014	33.6%	356,000
2000	1,087,087	30.4%	330,000
2001	875,854	24.5%	215,000
2002	734,260	25.9%	190,000
2003	688,887	28.5%	196,000
2004	775,274	27.7%	215,000
2005	878,648	29.7%	261,000
2006	789,815	23.5%	186,000
2007	997,506	23.8%	237,000
2008	1,243,942	24.2%	301,000
2009	1,204,490	22.8%	275,000

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

2) U.S. Dept of Commerce, Office of Travel & Tourism Industries, "Survey of International Air Travelers."

### Number of Visitors from France to CA, 2000-2009 (in 000s)



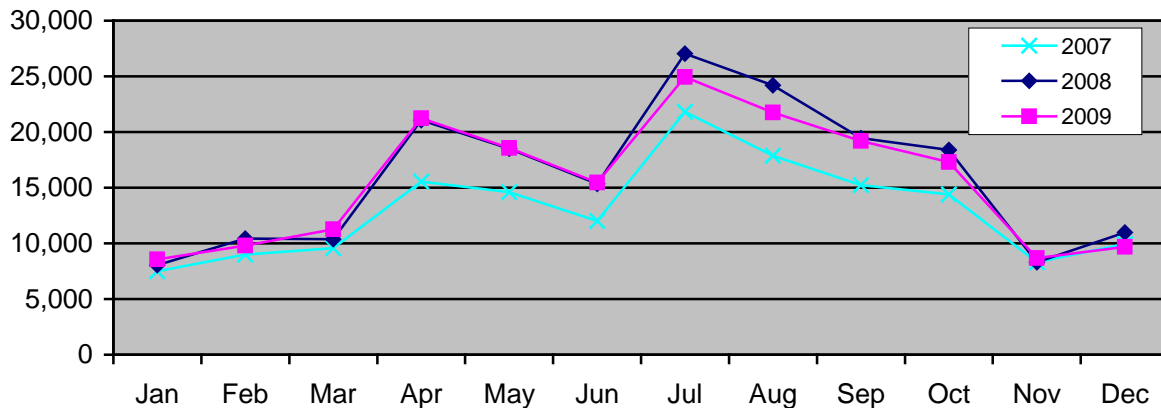
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 dropped over the years to 275,000 visitors in 2009 and the lowest market share (22.8%) in the past 10 years.

## French Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from France to California were similar in 2009 compared with 2008. In all years, French resident arrivals at California ports-of-entry peaked in July. The lowest volumes were recorded in January and November.

**Residents of France  
Monthly Port of Entry Arrivals to CA  
2007-2009**



U.S. Department of Homeland Security, I-94 Form; 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 leisure/recreation/holiday purposes
- Have longer trip planning and advance airline booking horizons
- Mention a non-stop flight as the main factor in selecting an airline
- Travel in economy class
- Travel with a spouse or in a tour group
- Stay in a hotel or motel
- Be on their first trip to the U.S.
- Visit Los Angeles, San Francisco, Las Vegas, and the Grand Canyon
- Sightsee in Cities, visit historical places, visit national parks, visit small towns, visit cultural heritage sites, go to casinos or gamble, visit art galleries or museums, and go on guided tours
- Rent an auto or use public transit for transportation while in the U.S.

Conversely, visitors from France are less likely to:

- Travel to California for business purposes
- Sit in executive or business class during their flight
- Travel alone
- Use a company or private auto for transportation in the U.S.

### Characteristics of Travelers from France to California – 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from France (n =167)	Leisure Visitors from France (n = 119)
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	47%	78%	89%
Business/Professional	22%	9%	-
Visit Friends/Relatives	21%	10%	12%
Convention/Conference	6%	1%	-
Other Purpose	5%	2%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	65%	81%	94%
Visit Friends/Relatives	37%	29%	18%
Business/Professional	26%	17%	1%
Convention/Conference	8%	2%	-
<b>Sources Used to Plan Trip**</b>			
Airlines Directly	23%	17%	13%
Corporate Travel Department	8%	8%	8%
Personal Computer	43%	40%	41%
Friends/Relatives	18%	12%	11%
Newspapers/Magazines	3%	2%	2%
State/City Travel Office	4%	1%	-
Tour Company	7%	10%	10%
Travel Agency	40%	41%	36%
Travel Guides	10%	12%	13%
<b>Advance Planning for Trip</b>			
7 days or less	7%	2%	2%
8 - 30 days	28%	13%	12%
31 - 60 days	19%	9%	8%
61 - 90 days	12%	13%	15%
More than 3 Months	34%	63%	64%
Total	100%	100%	100%
Average Planning Time in Days	100 days	176 days	165 days
<b>Advance Airline Reservations</b>			
7 days or less	13%	5%	3%
8 - 30 days	38%	23%	21%
31 - 60 days	16%	15%	18%
61 - 90 days	10%	20%	23%
91 - 120 days	6%	7%	7%
121 - 180 days	10%	21%	15%
6 Months or More	7%	9%	12%
Total	100%	100%	100%
Average Booking in Days	67 days	97 days	99 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%.

Sources: International Trade Administration Office of Travel and Tourism Industries  
"Survey of International Air Travelers."

**Characteristics of Travelers from France to California  
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from France (n = 167)	Leisure Visitors from France (n = 119)
<b>Means of Booking Air Trip</b>			
Airlines Directly	13%	11%	10%
Corporate Travel Department	9%	7%	6%
Personal Computer	25%	28%	31%
Travel Agent	46%	47%	46%
Travel Club	1%	3%	5%
Tour Operator	5%	4%	3%
Other/Don't Know	2%	-	-
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	32%	35%	34%
Schedule	13%	6%	-
Non-Stop Flight	12%	25%	31%
Mileage Bonus/Frequent Flyer Program	10%	11%	8%
Previous Good Experience	9%	5%	4%
Safety Reputation	6%	5%	6%
Airline Loyalty	4%	-	-
In-flight Service	5%	-	-
Employer Policy	3%	7%	7%
Other	6%	6%	10%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	81%	93%	94%
Executive/Business	17%	4%	2%
First Class	2%	4%	4%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	29%	39%
No	86%	71%	61%
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	-	-
8 - 30 days	24%	11%	11%
31 - 60 days	13%	-	-
61 - 90 days	13%	25%	25%
91 - 120 days	8%	-	-
121 - 180 days	18%	25%	24%
6 Months or More	20%	39%	40%
Total	100%	100%	100%

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**Characteristics of Travelers from France to California  
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from France (n = 167)	Leisure Visitors from France (n = 119)
<b>Travel Companions**</b>			
Business Associates	8%	4%	-
Family/Relatives	25%	33%	39%
Friends	11%	14%	18%
Spouse	28%	38%	48%
Tour Group	2%	12%	16%
Traveling Alone	38%	23%	11%
<b>Average Travel Party Size</b>	1.6	2.0	2.4
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	88%	88%
Private Home	30%	21%	20%
Other	4%	6%	5%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.4 nights	17.8 nights	16.8 nights
Mean Nights in California	11.7 nights	8.6 nights	7.9 nights
% of California Nights	52%	48%	47%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	43%	52%
Average Trips to the U.S. in Past Year	1.7 trips	1.3 trips	1.1 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	2.6 trips	2.0 trips
<b>Average Number of States Visited</b>	2.1 states	2.5 states	2.7 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	4.3 dest.	4.8 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	55%	63%	66%
San Francisco	48%	76%	83%
Las Vegas	30%	42%	48%
New York City	18%	12%	11%
San Diego	13%	7%	7%
Anaheim-Santa Ana	7%	2%	2%
Grand Canyon	7%	27%	35%
San Jose	6%	11%	7%
Yosemite	4%	13%	16%
Chicago	4%	1%	1%
DC Metro Area	4%	1%	-
Monterey-Salinas	4%	7%	9%
Riverside/San Bernardino	4%	6%	5%
Seattle	3%	2%	-
Sacramento	3%	1%	2%
Santa Barbara	3%	3%	4%
Oakland	2%	2%	1%

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**Characteristics of Travelers from France to California  
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<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	83%	81%
Dining Out	86%	81%	76%
Sightseeing in Cities	56%	76%	76%
Historical Places	45%	63%	64%
National Parks	39%	77%	83%
Amusement/Theme Parks	39%	47%	49%
Visiting Small Towns	38%	55%	57%
Cultural Heritage Sites	32%	52%	49%
Touring Countryside	31%	35%	39%
Casinos/Gambling	27%	58%	57%
Art Gallery/Museum	26%	36%	29%
Guided Tours	24%	37%	32%
<b>Transportation While in the U.S.**</b>			
Airlines in U.S.	39%	38%	28%
Taxi/Limousine	39%	34%	24%
Rented Auto	38%	56%	51%
Company or Private Auto	29%	14%	15%
City Subway/Tram/Bus	26%	38%	28%
Railroad between Cities	11%	14%	13%
Bus between Cities	10%	13%	16%
Motor Home/Camper	2%	3%	3%
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,584	\$3,784	\$3,837
Per Visitor/Trip (U.S.)	\$2,308	\$1,923	\$1,618
Per Visitor Per Day	\$103	\$108	\$96
Per Visitor/Trip (California)	\$1,205	\$929	\$758
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$660	\$596	\$362
Food/Beverages	\$463	\$427	\$398
Gifts/Souvenirs	\$395	\$265	\$304
Transportation in the U.S.	\$348	\$428	\$347
Entertainment	\$234	\$148	\$160
Expenses at the Airport	\$34	\$18	\$15
Other	\$174	\$40	\$33
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,308</b>	<b>\$1,923</b>	<b>\$1,618</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	50%	52%	50%
Cash	41%	42%	45%
Debit Cards	7%	5%	5%
Travelers Checks	2%	1%	1%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	43 years	43 years	49 years
Average Age - Females	39 years	41 years	41 years
<b>Occupation</b>			
Professional/Technical	35%	29%	31%
Manager/Executive	28%	31%	24%
Student	10%	8%	6%
Retired	8%	16%	21%
Clerical/Sales	7%	9%	12%
Other	13%	7%	7%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	9%	4%	4%
\$20,000 - \$39,999	14%	9%	12%
\$40,000 - \$59,999	14%	25%	13%
\$60,000 - \$79,999	13%	18%	20%
\$80,000 - \$99,999	11%	7%	6%
\$100,000 - \$119,999	9%	8%	9%
\$120,000 - \$139,999	6%	9%	12%
\$140,000 - \$159,999	5%	6%	7%
\$160,000 - \$179,999	3%	2%	2%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	12%	12%	15%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$92,900	\$100,800

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