

CHARACTERISTICS OF TRAVELERS FROM FRANCE TO CALIFORNIA – 2010

France was California’s seventh largest overseas market with approximately 383,000 visitors to California in 2010. Collectively visitors from France spent approximately \$314 million in California.

French visitors to California during 2010 reported spending \$78 per day during a 10.5 night average stay or approximately \$819 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

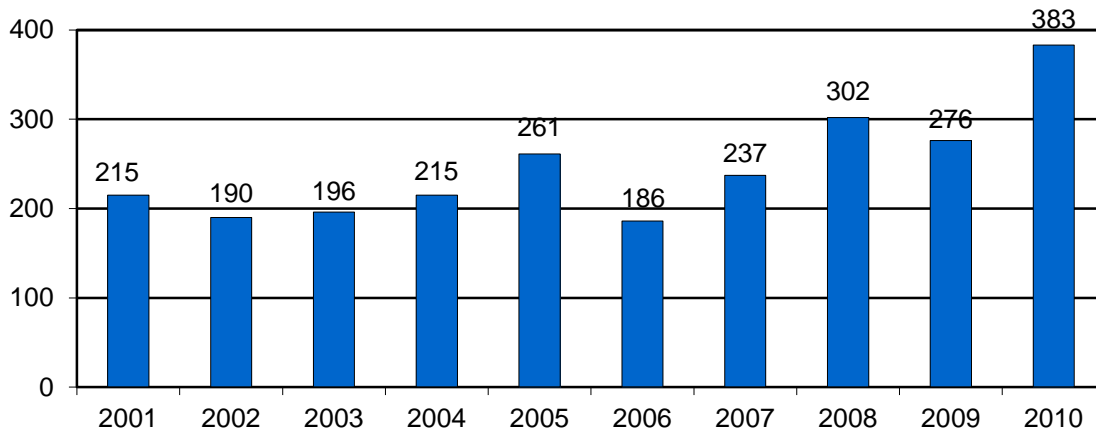
Visitors From France

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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	24.3%	302,000
2009	1,204,490	22.9%	276,000
2010	1,342,207	28.5%	383,000

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, 2001-2010 (in 000s)



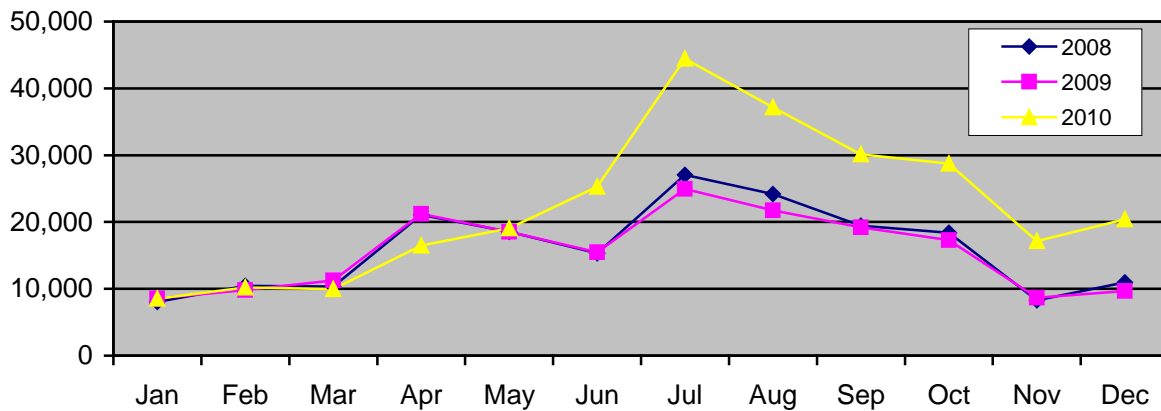
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 fallen over the years. Visitor volume rose to 383,000 visitors in 2010 and the highest market share (28.5%) in recent years.

French Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from France to California were higher in the later part of 2010 compared with 2009. In all years, French resident arrivals at California ports-of-entry peaked in July. The lowest volumes were recorded in January and February.

**Residents of France
Monthly Port of Entry Arrivals to CA
2008-2010**



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
- Book their air trip with a personal computer
- Travel in economy class
- Use an inclusive travel package
- Visit Las Vegas, Flagstaff, and the Grand Canyon
- Visit historical places, go to amusement/theme parks, visit national parks, and go to casinos or gamble

Conversely, visitors from France are less likely to:

- Travel to California for business purposes
- Book their air trip with a travel agent
- Sit in executive or business class during their flight
- Use a taxi or limousine, airlines, or a company or private auto for transportation in the U.S.

Characteristics of Travelers from France to California – 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from France (n = 259)	Leisure Visitors from France (n = 191)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	61%	75%
Visit Friends/Relatives	22%	20%	25%
Business/Professional	21%	9%	-
Convention/Conference	5%	5%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	75%	88%
Visit Friends/Relatives	39%	29%	32%
Business/Professional	24%	11%	1%
Convention/Conference	9%	7%	-
Sources Used to Plan Trip**			
Personal Computer	44%	42%	44%
Travel Agency	40%	30%	35%
Airlines Directly	23%	23%	22%
Friends/Relatives	17%	13%	14%
Travel Guides	10%	11%	13%
Corporate Travel Department	8%	10%	4%
Tour Company	5%	3%	4%
State/City Travel Office	4%	2%	2%
Newspapers/Magazines	3%	3%	2%
Advance Planning for Trip			
7 days or less	6%	4%	4%
8 - 30 days	28%	17%	15%
31 - 60 days	20%	18%	12%
61 - 90 days	12%	15%	15%
More than 3 Months	34%	46%	54%
Total	100%	100%	100%
Average Planning Time in Days	98 days	128 days	143 days
Advance Airline Reservations			
7 days or less	12%	7%	6%
8 - 30 days	38%	36%	22%
31 - 60 days	17%	14%	13%
61 - 90 days	10%	17%	20%
91 - 120 days	7%	13%	16%
121 - 180 days	10%	14%	18%
6 Months or More	7%	5%	6%
Total	100%	100%	100%
Average Booking in Days	68 days	82 days	92 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from France (n = 259)	Leisure Visitors from France (n = 191)
Means of Booking Air Trip			
Travel Agent	46%	34%	36%
Personal Computer	26%	34%	37%
Airlines Directly	13%	19%	19%
Corporate Travel Department	8%	8%	3%
Tour Operator	4%	4%	4%
Travel Club	1%	-	-
Other/Don't Know	2%	1%	-
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	34%	37%
Schedule	14%	12%	15%
Non-Stop Flight	14%	11%	10%
Mileage Bonus/Frequent Flyer Program	10%	12%	13%
Previous Good Experience	9%	11%	7%
Safety Reputation	8%	6%	7%
Airline Loyalty	4%	3%	2%
In-flight Service	4%	6%	7%
Employer policy	3%	3%	-
Other	6%	2%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	93%	94%
Executive/Business	15%	6%	5%
First Class	2%	2%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	22%	27%
No	86%	79%	73%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	8%	8%
8 - 30 days	27%	12%	12%
31 - 60 days	15%	11%	11%
61 - 90 days	10%	10%	10%
91 - 120 days	11%	22%	22%
121 - 180 days	20%	27%	28%
6 Months or More	14%	9%	9%
Total	100%	100%	100%

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**Characteristics of Travelers from France to California
(2010 - cont.)**

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Travel Companions**			
Traveling Alone	39%	35%	24%
Spouse	27%	33%	39%
Family/Relatives	25%	31%	40%
Friends	11%	14%	16%
Business Associates	8%	3%	2%
Tour Group	2%	4%	4%
Average Travel Party Size	1.6	1.7	2.0
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	77%	79%
Private Home	29%	25%	26%
Other	4%	8%	7%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	18.9 nights	17.0 nights
Mean Nights in California	11.3 nights	10.5 nights	9.6 nights
% of California Nights	50%	56%	56%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	34%	52%
Average Trips to the U.S. in Past Year	1.8 trips	1.4 trips	1.3 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	3.6 trips	3.3 trips
Average Number of States Visited	2.1 states	2.2 states	2.5 states
Average Number of Destinations Visited	3.0 dest.	3.7 dest.	4.1 dest.
Places Visited in the U.S.**			
Los Angeles	60%	66%	72%
San Francisco	47%	54%	60%
Las Vegas	29%	46%	57%
New York City	16%	12%	12%
San Diego	14%	16%	11%
Flagstaff	8%	25%	32%
Anaheim-Santa Ana	7%	3%	3%
Grand Canyon	5%	13%	16%
San Jose	5%	1%	1%
DC Metro Area	5%	1%	-
Yosemite	4%	6%	8%
Chicago	4%	2%	1%
Monterey-Salinas	4%	4%	5%
Miami	4%	1%	1%
Riverside/San Bernardino	4%	8%	11%
Seattle	3%	2%	3%
Sacramento	3%	2%	2%

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Activities Experienced While in the U.S.**			
Shopping	88%	86%	88%
Dining Out	85%	77%	77%
Sightseeing in Cities	57%	59%	64%
Historical Places	47%	55%	63%
Amusement/Theme Parks	40%	51%	57%
National Parks	38%	57%	65%
Visiting Small Towns	38%	43%	45%
Cultural Heritage Sites	31%	34%	38%
Touring Countryside	31%	23%	25%
Art Gallery/Museum	26%	27%	27%
Casinos/Gambling	25%	40%	47%
Guided Tours	23%	22%	24%
Transportation While in the U.S.**			
Rented Auto	41%	47%	53%
Taxi/Limousine	39%	30%	28%
Airlines in U.S.	37%	21%	23%
Company or Private Auto	28%	19%	21%
City Subway/Tram/Bus	25%	27%	28%
Railroad between Cities	12%	18%	17%
Bus between Cities	10%	14%	11%
Motor Home/Camper	2%	2%	3%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$2,580	\$2,821
Per Visitor/Trip (U.S.)	\$2,435	\$1,478	\$1,424
Per Visitor Per Day	\$107	\$78	\$84
Per Visitor/Trip (California)	\$1,209	\$819	\$806
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$395	\$365
Food/Beverages	\$514	\$341	\$340
Gifts/Souvenirs	\$421	\$246	\$234
Transportation in the U.S.	\$384	\$244	\$255
Entertainment	\$243	\$171	\$187
Expenses at the Airport	\$34	\$19	\$14
Other	\$179	\$62	\$30
Total Spending Per Visitor/Trip	\$2,435	\$1,478	\$1,424

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Payment Method for Trip Expenses			
Credit Cards	52%	56%	58%
Cash	39%	37%	38%
Debit Cards	7%	6%	4%
Travelers Checks	1%	1%	-
Total	100%	100%	100%
Age			
Average Age - Males	43 years	41 years	43 years
Average Age - Females	40 years	41 years	42 years
Occupation			
Professional/Technical	33%	25%	25%
Manager/Executive	29%	31%	30%
Student	10%	16%	13%
Retired	9%	10%	11%
Clerical/Sales	8%	9%	9%
Other	12%	10%	12%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	10%	10%
\$20,000 - \$39,999	13%	13%	9%
\$40,000 - \$59,999	14%	21%	22%
\$60,000 - \$79,999	13%	10%	13%
\$80,000 - \$99,999	11%	10%	11%
\$100,000 - \$119,999	11%	11%	11%
\$120,000 - \$139,999	7%	7%	7%
\$140,000 - \$159,999	6%	9%	10%
\$160,000 - \$179,999	3%	2%	1%
\$180,000 - \$199,999	3%	-	-
\$200,000 and over	13%	8%	7%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$85,200	\$85,900

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