

CHARACTERISTICS OF TRAVELERS FROM THE MIDDLE EAST TO CALIFORNIA - 2010

The Middle East was one of California's large overseas markets with approximately 143,000 visitors to California in 2010. Collectively visitors from the Middle East spent approximately \$254 million in California.

Middle Eastern visitors to California during 2010 reported spending \$95 per day during a 18.7 night average stay or approximately \$1,777 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

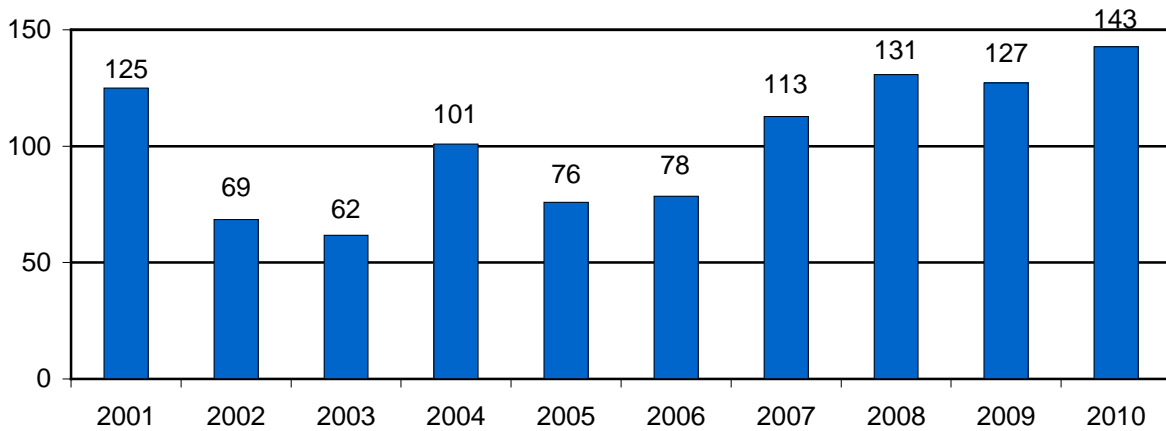
Visitors From The Middle East

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2000	702,105	19.4%	136,000
2001	644,156	19.4%	125,000
2002	482,534	14.2%	69,000
2003	447,112	13.8%	62,000
2004	502,170	20.1%	101,000
2005	527,361	14.4%	76,000
2006	552,730	14.2%	78,000
2007	619,818	18.2%	113,000
2008	680,974	19.2%	131,000
2009	665,942	19.1%	127,000
2010	735,549	19.4%	143,000

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 The Middle East to CA, 2001-2010
(in 000s)



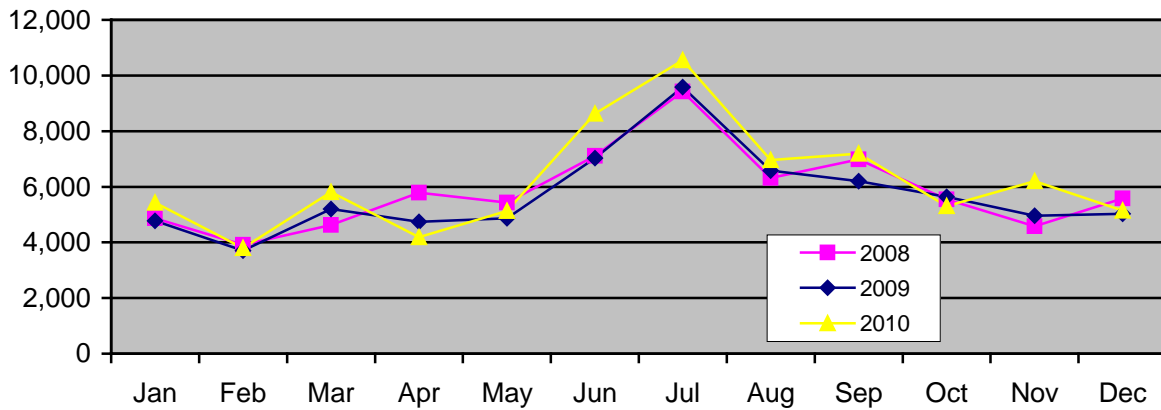
Source: International Trade Administration, Office of Travel and Tourism Industries.

Visitation from the Middle East peaked in 2000 at 136,000, but then dropped to a low of 62,000 in 2002 (post 9-11). The volume of Middle Eastern visitors to California has experienced strong recovery since 2005 and has risen to 143,000 visitors in 2010.

Middle Eastern Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from the Middle East to California were similar in 2010 compared with 2009 and 2008. Middle Eastern resident arrivals at California ports-of-entry peaked in July. The lowest volumes of arrivals were recorded in February each year.

**Residents of The Middle East
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 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:

- Have a decidedly shorter trip planning and advance airline booking horizon
- Mention a non-stop flight as the main factor in choosing an airline
- Travel with friends or relatives
- Visit New York City or San Diego while in the U.S.
- Visit amusement or theme parks
- Make use of airlines as a means of transportation while in the U.S.
- Spend a larger part of their travel dollars on gifts or souvenirs

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

- Visit San Francisco as part of their U.S. trip
- Experience such leisure activities as sightseeing in cities, visiting historical places, visiting national parks, visiting cultural heritage sites, and going on guided tours

Characteristics of Travelers from the Middle East to California, 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Middle East (n = 203)	Leisure Visitors from the Middle East (n = 114)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	40%	61%
Visit Friends/Relatives	22%	25%	39%
Business/Professional	21%	24%	-
Convention/Conference	5%	5%	-
Other Purpose	5%	6%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	59%	79%
Visit Friends/Relatives	39%	48%	62%
Business/Professional	24%	27%	4%
Convention/Conference	9%	9%	-
Sources Used to Plan Trip**			
Personal Computer	44%	40%	50%
Travel Agency	40%	39%	30%
Airlines Directly	23%	26%	24%
Friends/Relatives	17%	17%	24%
Travel Guides	10%	6%	8%
Corporate Travel Department	8%	5%	-
Tour Company	5%	2%	1%
State/City Travel Office	4%	2%	4%
Newspapers/Magazines	3%	2%	3%
Advance Planning for Trip			
7 days or less	6%	10%	9%
8 - 30 days	28%	34%	22%
31 - 60 days	20%	18%	20%
61 - 90 days	12%	18%	22%
More than 3 Months	34%	19%	27%
Total	100%	100%	100%
Average Planning Time in Days	98 days	63 days	75 days
Advance Airline Reservations			
7 days or less	12%	20%	15%
8 - 30 days	38%	38%	29%
31 - 60 days	17%	23%	30%
61 - 90 days	10%	12%	18%
91 - 120 days	7%	3%	3%
121 - 180 days	10%	4%	7%
6 Months or More	7%	-	-
Total	100%	100%	100%
Average Booking in Days	68 days	43 days	54 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 the Middle East to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Middle East (n = 203)	Leisure Visitors from the Middle East (n = 114)
Means of Booking Air Trip			
Travel Agent	46%	53%	41%
Personal Computer	26%	23%	34%
Airlines Directly	13%	10%	11%
Corporate Travel Department	8%	8%	5%
Tour Operator	4%	-	-
Travel Club	1%	2%	3%
Other/Don't Know	2%	4%	6%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	30%	39%
Schedule	14%	21%	17%
Non-Stop Flight	14%	27%	26%
Mileage Bonus/Frequent Flyer Program	10%	3%	1%
Previous Good Experience	9%	4%	1%
Safety Reputation	8%	9%	10%
Airline Loyalty	4%	-	-
In-flight Service	4%	-	-
Employer policy	3%	1%	1%
Other	6%	5%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	91%	94%
Executive/Business	15%	8%	6%
First Class	2%	1%	-
Total	100%	100%	100%
Use of Package			
Yes	14%	6%	3%
No	86%	94%	97%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	29%	-
8 - 30 days	27%	67%	77%
31 - 60 days	15%	5%	23%
61 - 90 days	10%	-	-
91 - 120 days	11%	-	-
121 - 180 days	20%	-	-
6 Months or More	14%	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from the Middle East to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Middle East (n = 203)	Leisure Visitors from the Middle East (n = 114)
Travel Companions**			
Traveling Alone	39%	39%	26%
Spouse	27%	28%	33%
Family/Relatives	25%	38%	54%
Friends	11%	4%	5%
Business Associates	8%	4%	-
Tour Group	2%	3%	6%
Average Travel Party Size	1.6	1.6	2.0
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	75%	70%
Private Home	29%	35%	44%
Other	4%	3%	4%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	27.6 nights	24.0 nights
Mean Nights in California	11.3 nights	18.7 nights	12.6 nights
% of California Nights	50%	68%	53%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	24%	29%
Average Trips to the U.S. in Past Year	1.8 trips	1.7 trips	1.4 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.4 trips	3.5 trips
Average Number of States Visited	2.1 states	2.3 states	2.4 states
Average Number of Destinations Visited	3.0 dest.	2.9 dest.	3.2 dest.
Places Visited in the U.S.**			
Los Angeles	60%	63%	82%
San Francisco	47%	36%	37%
Las Vegas	29%	30%	43%
New York City	16%	38%	45%
San Diego	14%	26%	26%
Flagstaff	8%	2%	3%
Anaheim-Santa Ana	7%	7%	1%
Grand Canyon	5%	2%	3%
San Jose	5%	5%	2%
DC Metro Area	5%	7%	11%
Yosemite	4%	1%	2%
Chicago	4%	2%	1%
Monterey-Salinas	4%	1%	2%
Miami	4%	3%	4%
Riverside/San Bernardino	4%	1%	1%
Seattle	3%	3%	1%
Sacramento	3%	4%	4%

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**Characteristics of Travelers from the Middle East to California
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Middle East (n = 203)	Leisure Visitors from the Middle East (n = 114)
Activities Experienced While in the U.S.**			
Shopping	88%	91%	99%
Dining Out	85%	88%	91%
Sightseeing in Cities	57%	47%	54%
Historical Places	47%	33%	39%
Amusement/Theme Parks	40%	50%	62%
National Parks	38%	27%	33%
Visiting Small Towns	38%	33%	41%
Cultural Heritage Sites	31%	14%	18%
Touring Countryside	31%	32%	40%
Art Gallery/Museum	26%	23%	27%
Casinos/Gambling	25%	17%	20%
Guided Tours	23%	10%	14%
Transportation While in the U.S.**			
Rented Auto	41%	47%	49%
Taxi/Limousine	39%	36%	30%
Airlines in U.S.	37%	49%	50%
Company or Private Auto	28%	27%	28%
City Subway/Tram/Bus	25%	19%	19%
Railroad between Cities	12%	7%	4%
Bus between Cities	10%	4%	5%
Motor Home/Camper	2%	6%	9%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$4,240	\$5,627
Per Visitor/Trip (U.S.)	\$2,435	\$2,631	\$2,822
Per Visitor Per Day	\$107	\$95	\$118
Per Visitor/Trip (California)	\$1,209	\$1,777	\$1,487
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$714	\$630
Food/Beverages	\$514	\$381	\$423
Gifts/Souvenirs	\$421	\$641	\$734
Transportation in the U.S.	\$384	\$361	\$419
Entertainment	\$243	\$238	\$332
Expenses at the Airport	\$34	\$43	\$50
Other	\$179	\$253	\$235
Total Spending Per Visitor/Trip	\$2,435	\$2,631	\$2,822

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Payment Method for Trip Expenses			
Credit Cards	52%	60%	65%
Cash	39%	37%	32%
Debit Cards	7%	3%	2%
Travelers Checks	1%	1%	1%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	43 years	40 years
Average Age - Females	40 years	45 years	47 years
Occupation			
Professional/Technical	33%	41%	37%
Manager/Executive	29%	24%	18%
Student	10%	12%	11%
Retired	9%	8%	12%
Clerical/Sales	8%	6%	10%
Other	12%	9%	12%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	6%	5%
\$20,000 - \$39,999	13%	20%	29%
\$40,000 - \$59,999	14%	15%	19%
\$60,000 - \$79,999	13%	12%	12%
\$80,000 - \$99,999	11%	14%	8%
\$100,000 - \$119,999	11%	9%	8%
\$120,000 - \$139,999	7%	11%	5%
\$140,000 - \$159,999	6%	9%	10%
\$160,000 - \$179,999	3%	2%	2%
\$180,000 - \$199,999	3%	1%	-
\$200,000 and over	13%	3%	3%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$81,400	\$73,100

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