

CHARACTERISTICS OF TRAVELERS FROM FRANCE TO CALIFORNIA – 2008

France was California's fifth largest overseas market with approximately 301,000 visitors to California in 2008. Collectively visitors from France spent approximately \$313 million in California.

French visitors to California during 2008 reported spending \$104 per day during a 10.0 night average stay or approximately \$1,040 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

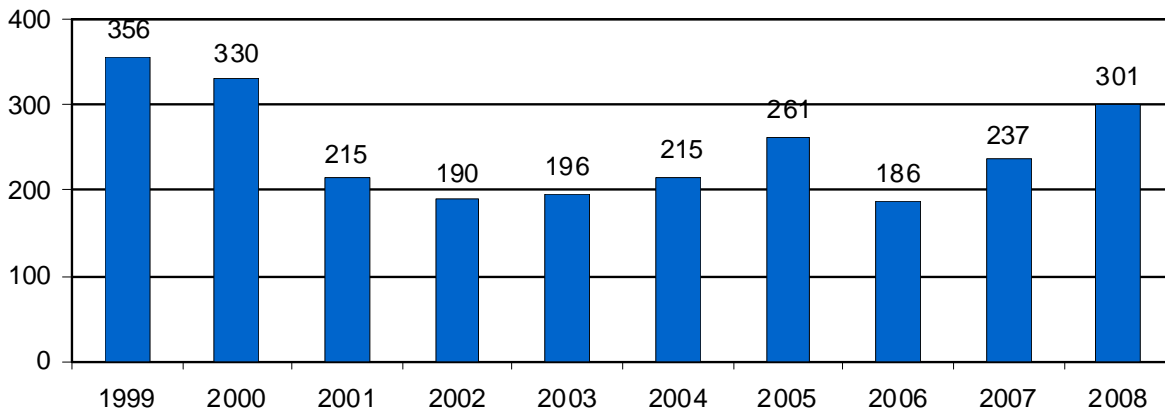
Visitors From France

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	1,013,222	34.3%	348,000
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

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, 1999-2008
(in 000s)**



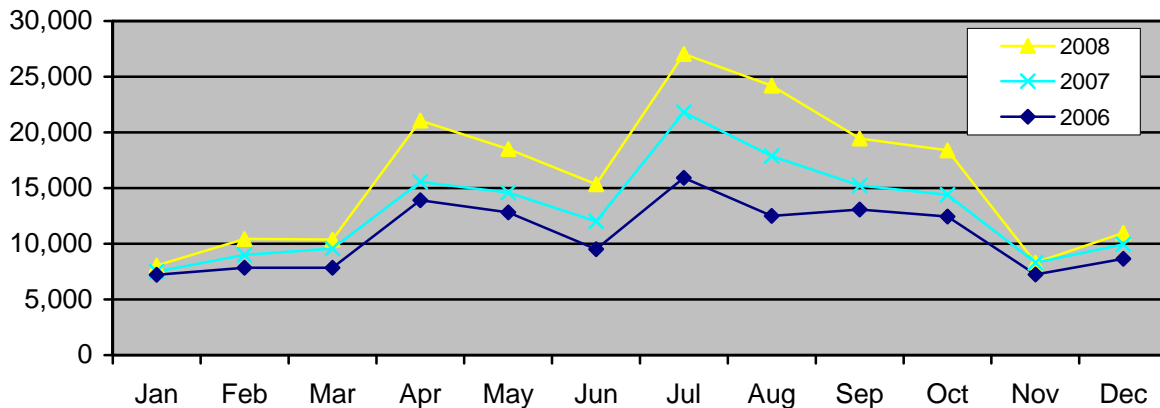
Source: International Trade Administration, Office of Travel and Tourism Industries.

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). Both market share and visitor volume have increased in the last 2 years. The number of visitors in 2008 (301,000) was the highest since 2000.

French Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from France to California were higher in most of 2008 compared with 2006 and 2007. In all years, French resident arrivals at California ports-of-entry peaked in July. The lowest volumes were recorded in January, February, March, November and December.

**Residents of France
Monthly Port of Entry Arrivals to CA
2006-2008**



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:

- Use a personal computer for booking an air trip
- Mention airfare as a main factor in choosing an airline
- Travel in economy class
- Visit Los Angeles, San Francisco, the Grand Canyon, and Santa Barbara
- Visit national parks, and art galleries or museums
- Rent an auto for transportation while in the U.S.
- Spend a lower percentage of their travel dollar per visitor/trip
- Have a lower average annual household income

Conversely, visitors from France are less likely to:

- Make use of a travel agent or when booking their trip
- Visit New York City
- Go shopping while in the U.S.
- Make use of a taxi/limousine or airlines for transportation while in the U.S.
- Use cash to pay for trip expenses

**Characteristics of Travelers from
France to California – 2008**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from France (n = 251)	Leisure Visitors from France (n = 150)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	47%	76%
Visit Friends/Relatives	19	15	24
Business/Professional	27	27	-
Convention/Conference	7	7	-
Other Purpose	5	3	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	59%	90%
Visit Friends/Relatives	37	31	39
Business/Professional	31	29	-
Convention/Conference	11	9	-
Sources Used to Plan Trip**			
Airlines Directly	21%	17%	15%
Corporate Travel Department	11	6	0
Personal Computer	42	40	53
Friends/Relatives	16	13	20
Newspapers/Magazines	3	1	1
State/City Travel Office	4	0	1
Tour Company	6	7	7
Travel Agency	43	39	31
Travel Guides	10	6	9
Advance Planning for Trip			
7 days or less	9%	8%	5
8 - 30 days	30	31	18
31 - 60 days	19	12	8
61 - 90 days	13	13	20
More than 3 Months	30	36	49
Total	100%	100%	100%
Average Planning Time in Days	92	97	127
Advance Airline Reservations			
7 days or less	16%	11%	8%
8 - 30 days	38	38	22
31 - 60 days	17	18	23
61 - 90 days	10	11	15
91 - 120 days	5	4	4
121 - 180 days	8	10	16
6 Months or More	6	8	12
Total	100%	100%	100%
Average Booking in Days	60	65	88

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from France (n = 251)	Leisure Visitors from France (n = 150)
Means of Booking Air Trip			
Airlines Directly	12%	10%	7%
Corporate Travel Department	11	17	0
Personal Computer	22	31	45
Travel Agent	48	31	29
Travel Club	1	-	-
Tour Operator	4	2	3
Other/Don't Know	3	10	17
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	32%	44%
Schedule	15	11	8
Non-Stop Flight	13	11	12
Mileage Bonus/Frequent Flyer Program	12	12	9
Previous Good Experience	10	6	4
Safety Reputation	7	11	11
Airline Loyalty	4	2	1
In-flight Service	5	0	-
Employer policy	4	8	1
Other	6	7	11
Airline Seating Area			
Economy/Tourist/Coach	77%	85%	98
Executive/Business	20	14	2
First Class	3	0	-
Total	100%	100%	100%
Use of Package			
Yes	11%	10%	13%
No	89	90	87
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	14%	-
8 - 30 days	26	27	32%
31 - 60 days	23	12	0
61 - 90 days	12	25	36
91 - 120 days	5	7	10
121 - 180 days	17	5	7
6 Months or More	14	11	15
Total	100%	100%	100%

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**Characteristics of Travelers from France to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from France (n = 251)	Leisure Visitors from France (n = 150)
Travel Companions**			
Business Associates	10%	6%	-
Family/Relatives	23	22	34%
Friends	12	13	20
Spouse	27	26	38
Tour Group	2	4	6
Traveling Alone	39	43	20
Average Travel Party Size	1.5	1.5	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	82%	76%
Private Home	28	28	37
Other	4	4	6
Length of Stay			
Mean Nights in the U.S.	21.2	18.6	18.6
Mean Nights in California	11.0	10.0	11.0
% of California Nights	52%	54%	59%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	24%	34%
Average Trips to the U.S. in Past Year	2.0	1.6	1.2
Average Trips to the U.S. in Past 5 Years	6.3	4.7	3.0
Average Number of States Visited	2.0	2.0	2.3
Average Number of Destinations Visited	2.9	3.4	4.2
Places Visited in the U.S.**			
Los Angeles	53%	60%	65%
San Francisco	49	59	71
Las Vegas	28	32	44
New York City	17	8	9
San Diego	13	14	14
San Jose	7	5	4
Anaheim-Santa Ana	7	8	8
Yosemite	5	8	13
Grand Canyon	4	12	18
Chicago	4	3	2
DC Metro Area	4	1	1
Monterey-Salinas	4	3	4
Seattle	3	3	2
Sacramento	3	1	1
Riverside/San Bernardino	3	2	3
Santa Barbara	3	10	15
Oakland	3	2	1

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**Characteristics of Travelers from France to California
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from France (n = 251)	Leisure Visitors from France (n = 150)
Activities Experienced While in the U.S.**			
Dining Out	87%	86%	81%
Shopping	85	72	83
Sightseeing in Cities	53	46	53
Historical Places	44	50	65
Visiting Small Towns	36	37	46
National Parks	35	44	62
Amusement/Theme Parks	34	30	36
Touring Countryside	30	29	43
Cultural Heritage Sites	28	34	48
Casinos/Gambling	24	29	38
Art Gallery/Museum	23	31	39
Guided Tours	22	17	22
Transportation While in the U.S.**			
Taxi/Limousine	42%	18%	12%
Airlines in U.S.	40	17	13
Rented Auto	36	55	57
Company or Private Auto	28	22	20
City Subway/Tram/Bus	26	22	28
Railroad between Cities	11	11	12
Bus between Cities	9	11	16
Motor Home/Camper	2	0	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$2,861	\$2,993
Per Visitor/Trip (U.S.)	2,607	1,940	1,547
Per Visitor Per Day	123	104	83
Per Visitor/Trip (California)	\$1,353	\$1,040	\$913
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$697	\$350
Food/Beverages	526	391	373
Gifts/Souvenirs	450	297	279
Transportation in the U.S.	425	315	312
Entertainment	234	151	178
Expenses at the Airport	37	24	22
Other	135	65	32
Total Spending Per Visitor/Trip	\$2,607	\$1,940	\$1,547

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**Characteristics of Travelers from France to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from France (n = 251)	Leisure Visitors from France (n = 150)
Payment Method for Trip Expenses			
Credit Cards	53%	55%	52%
Cash	37	31	38
Debit Cards	6	11	4
Travelers Checks	3	4	6
Total	100%	100%	100%
Age			
Average Age - Males	41	41	40
Average Age - Females	38	38	39
Occupation			
Manager/Executive	34%	31%	21%
Professional/Technical	32	34	30
Student	8	10	11
Clerical/Sales	7	7	11
Retired	6	9	15
Other	13	10	12
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	6%	10%
\$20,000 - \$39,999	10	14	10
\$40,000 - \$59,999	13	23	33
\$60,000 - \$79,999	11	5	5
\$80,000 - \$99,999	11	8	7
\$100,000 - \$119,999	11	20	22
\$120,000 - \$139,999	7	5	4
\$140,000 - \$159,999	6	6	1
\$160,000 - \$179,999	4	6	3
\$180,000 - \$199,999	3	3	3
\$200,000 and over	18	4	2
Total	100%	100%	100%
Average Annual Income	\$107,200	\$88,900	\$75,200

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