France Market Profile

This summary provides the most up-to-date data available on France as it relates to their people and economy, travel related motivations and planning behavior and French visitor profile specific to Arizona.

GENERAL COUNTRY PROFILE

<table>
<thead>
<tr>
<th>Population:</th>
<th>67.8 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation Rate:</td>
<td>1.2%</td>
</tr>
<tr>
<td>GROSS DOMESTIC PRODUCT (GDP):</td>
<td>$2.85 trillion (2.3% annual growth rate)</td>
</tr>
<tr>
<td>Exchange Rates (EUR per USD):</td>
<td>1.19</td>
</tr>
<tr>
<td>Unemployment Rate:</td>
<td>9.4%</td>
</tr>
</tbody>
</table>

Source: The World Factbook, reporting 2017/2018 estimates, July 2020 population estimate

TRAVEL MOTIVATION AND PLANNING

**Top Travel Motivators**

- 55% Local Lifestyle
- 51% Cultural/Historical Attractions
- 41% Urban Attractions
- 40% Dining/Gastronomy

Source used to Destination selection for last intercontinental trip

- 49% websites via computer
- 35% Recommendation from family & friends
- 29% Information in printed travel guidebooks

**Advance Decision Time**

- 20% Less than a month
- 18% 1 to 2 months
- 32% 3 to 5 months
- 22% 6 to 12 months
- 6% More than 1 year

**Lodging Reservation made before leaving home**

- 79% Yes
- 54% Internet Booking Service*
- 17% Travel Agency/Travel Operator/Travel Club
- 15% The Lodging Establishment Directly
- 14% Other
- 21% No

*assume "Internet Booking Service" is an Online Travel Agency (OTA).

**How Air Reservations were Booked**

- 43% Directly with Airline
- 24% Travel Agency/Travel Operator/Travel Club
- 28% Internet Booking Service*
- 8% Corporate Travel Department

*assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source: Brand USA, reporting 2019 intercontinental traveler data

Source: U.S. Dept. of Commerce - NTTO, reporting 2017-19 aggregate data
The World Factbook, reporting 2017/2018 estimates,
U.S. Dept. of Commerce - NTTO, reporting 2017-19 aggregate data
VisaVUE Travel, reporting 2019 data

Source:

- 18%
- 25%
- 29%
- 55%

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**Visitation Volume to Arizona**

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitation Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>108,662</td>
</tr>
<tr>
<td>2011</td>
<td>113,385</td>
</tr>
<tr>
<td>2012</td>
<td>111,960</td>
</tr>
<tr>
<td>2013</td>
<td>109,230</td>
</tr>
<tr>
<td>2014</td>
<td>102,729</td>
</tr>
<tr>
<td>2015</td>
<td>103,300</td>
</tr>
<tr>
<td>2016</td>
<td>115,900</td>
</tr>
<tr>
<td>2017</td>
<td>113,000</td>
</tr>
</tbody>
</table>

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**Visitor Characteristics**

- **Age**: 43 years
- **Household Income**: $76,982
- **Average Party Size**: 2.5 persons
- **Average Nights per Destination**: 3.1
- **Average Nights in U.S.**: 19.6

---

**Main Purpose of Trip**

- Leisure: 92%
- Visit Friends/Relatives: 86%
- Vacation Holiday: 5%
- Other: 4%
- Convention/Conference/Trade Show: 8%

---

**Length of Stay**

- 46%: Less than 1 year
- 25%: 1 to 11 months
- 21%: 12 months to 5 years
- 8%: More than 5 years

---

**Average Party Size**

- 2.5 persons

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**By Quarter**

- Q1: 13%
- Q2: 33%
- Q3: 44%
- Q4: 16%

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**By Arizona Region**

- Northern: 56%
- Phoenix & Central: 26%
- West Coast: 7%
- Tucson & Southern: 7%
- North Central: 4%

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**Port of Entry**

- Los Angeles, CA: 61%
- San Francisco, CA: 22%
- New York, NY: 3%
- Chicago, IL: 3%
- Washington DC/Ohio, VA: 1%

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**Transportation in U.S.**

- Rented Auto: 74%
- Air Travel between U.S. Cities: 29%
- City Subway/Tram/Bus: 25%
- Auto, Private or Company: 14%

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**Accommodations**

- Hotel/Motel: 78%
- Private Home: 6%
- Other: 22%

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**Average Household Income**

- $2.85 trillion (2.3% annual growth rate)

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**French Visa Card Spending**

- #6 in 2019 with 3% of total international travel spending in Arizona.

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