

CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA – 2013

In 2013, Australia was California’s third largest overseas market to California with approximately 553,000 visitors to California. It was surpassed by the U.K with 652,000 visitors and by China with 818,000. Collectively visitors from Australia spent approximately \$990 million in California.

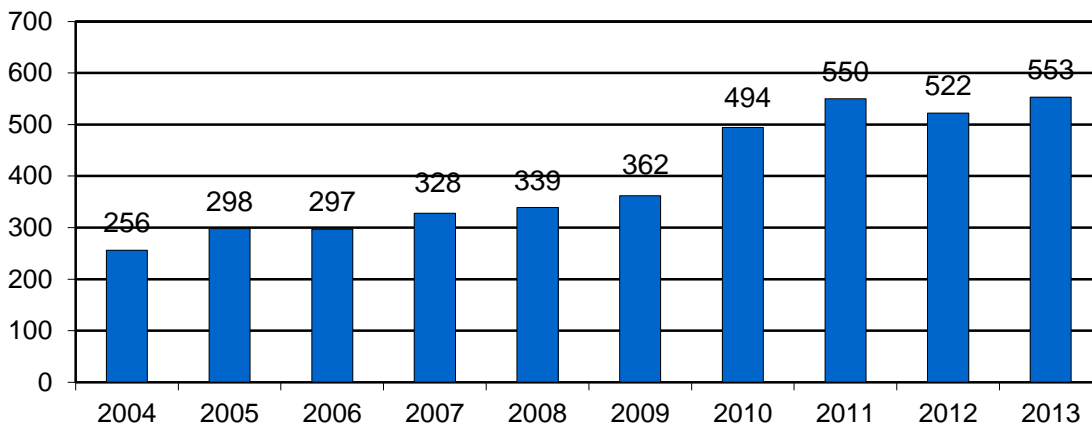
Australian visitors to California during 2013 reported spending \$166 per day during a 10.8 night average stay or approximately \$1,791 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

Visitors from Australia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	405,698	49.5%	201,000
2004	519,955	49.2%	256,000
2005	581,773	51.2%	298,000
2006	603,275	49.2%	297,000
2007	669,536	49.0%	328,000
2008	689,927	49.1%	339,000
2009	723,576	50.0%	362,000
2010	904,247	54.6%	494,000
2011	1,037,852	53.0%	550,000
2012	1,122,180	46.5%	522,000
2013	1,205,060	45.9%	553,000

- 1) U.S. Dept of Homeland Security, I-94 International Arrival Records.
- 2) U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers.

Number of Visitors from Australia to CA, 2004-2013 (in 000s)



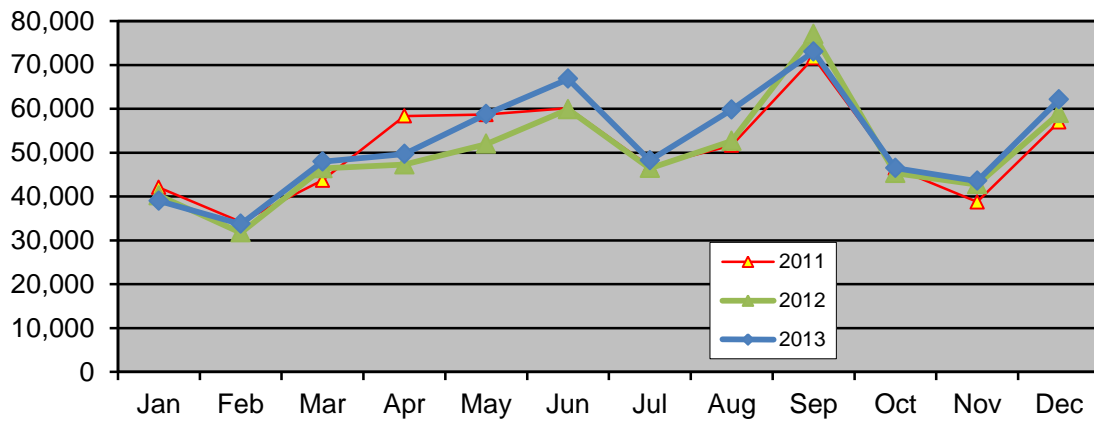
Source: U.S. Dept. of Commerce, National Travel and Tourism Office, Survey of International Air Travelers.

The volume of visitors to California from Australia was relatively flat throughout the decade of the 1990s, ranging from 260,000 to about 290,000 each year. Visitation from Australia peaked in 2000 at 328,000, but then dropped to a low of 199,000 in 2002 (post 9-11). The volume of Australian visitors to California has experienced strong recovery since 2003 and reached a record 553,000 visitors in 2013 making it California’s third largest overseas market.

Australian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Australia to California were similar in 2013 as in 2011 and 2012. Australian resident arrivals at California ports-of-entry have demonstrated consistent peaks in June, September and December. In 2013, Australian residents also showed an increase in arrivals during the months of May and August. The lowest volumes of arrivals were recorded in February each year.

**Residents of Australia
Monthly Port of Entry Arrivals to CA
2011-2013**



Source: U.S. Department of Homeland Security, I-94 International Arrival Records.
CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Australia 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 Australia are more likely to:

- Travel to California for vacation/holiday purposes
- Make use of a travel agency office as a trip planning source and means of booking air trip
- Have a decidedly longer trip planning and advance airline booking horizon
- Choose an airline based on airfare as a main factor
- Travel in economy/tourist/coach
- Travel with their spouse/partner or with family/relatives
- Stay in a hotel/motel
- Be on their first trip to the U.S.
- Visit Los Angeles, Las Vegas, New York City, Anaheim-Santa Ana and the island of Oahu while in the U.S.
- Engage in many leisure activities including: going on guided tours, attending concerts/plays/musicals, casinos/gambling, art galleries/museums, amusement/theme parks, visiting historical locations, and national parks/monuments
- Make use of air travel between U.S cities, taxicabs/limousines, a ferry/river taxi/short scenic cruise and city subway/tram/bus as means of transportation while in the U.S.
- Spend more while in the U.S.
- Have a higher average annual income

Conversely, visitors from Australia are less likely to:

- Travel to California for business/professional purposes
- Be traveling alone to the U.S.
- Stay in a private home
- Stay in California during most of their stay in the U.S.

Characteristics of Travelers from Australia to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Australia (n = 365)	Leisure Visitors from Australia (n = 304)
Primary Purpose of Trip			
Vacation/Holidays	52%	79%	90%
Visit Friends/Relatives	17%	9%	10%
Business	15%	4%	-
Convention/Conference	9%	5%	-
Other Purpose	8%	3%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	89%	98%
Visit Friends/Relatives	32%	27%	28%
Business	20%	6%	1%
Convention/Conference	12%	6%	1%
Sources Used to Plan Trip**			
Airline	43%	34%	34%
Online Travel Agency	31%	36%	40%
Travel Agency Office	26%	52%	56%
Personal Recommendation	26%	32%	34%
Travel Guide	15%	12%	14%
Corporate Travel Department	14%	10%	5%
Tour Operator/Travel Club	9%	9%	9%
National/State/City Travel Office	8%	9%	10%
Advance Planning for Trip			
7 days or less	5%	1%	<1%
8 - 30 days	27%	12%	9%
31 - 60 days	17%	8%	7%
61 - 90 days	14%	10%	11%
More than 3 Months	36%	68%	73%
Total	100%	100%	100%
Average Planning Time in Days	105 days	174 days	186 days
Advance Airline Reservations			
7 days or less	10%	4%	3%
8 - 30 days	35%	19%	16%
31 - 60 days	17%	12%	10%
61 - 90 days	13%	14%	14%
91 - 120 days	8%	17%	19%
121 - 180 days	9%	20%	23%
6 Months or More	7%	15%	15%
Total	100%	100%	100%
Average Booking in Days	72 days	115 days	122 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%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Australia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Australia (n = 365)	Leisure Visitors from Australia (n = 304)
Means of Booking Air Trip**			
Travel Agency Office	31%	58%	62%
Airlines Directly	28%	23%	24%
Internet Booking Service	24%	15%	16%
Corporate Travel Department	15%	8%	3%
Tour Operator/Travel Club	9%	4%	4%
Other	2%	<1%	1%
Main Factor in Selecting Airline			
Airfare	29%	39%	40%
Non-Stop Flights	17%	8%	8%
Convenient Schedule	15%	14%	16%
Mileage Bonus/Frequent Flyer Program	9%	9%	8%
Previous Good Experience	9%	5%	5%
Safety Reputation	6%	9%	11%
Loyalty to Carrier	4%	6%	6%
Other	4%	4%	3%
In-flight Service Reputation	3%	3%	3%
Employer policy	3%	2%	1%
On-time Reputation	2%	1%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	90%	90%
Executive/Business	10%	5%	3%
Premium Economy	10%	5%	6%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	17%	18%
No	85%	83%	82%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	12%	12%
Bus/Coach	7%	11%	11%
Guided Tours	6%	9%	10%
Meals	6%	6%	6%
Rental Car	5%	6%	7%
Tour Guide for Entire Trip	4%	2%	3%
Airfare and Accommodation Only	3%	1%	1%
Cruise	2%	2%	2%
Recreation	1%	2%	1%

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

** Multiple response question. Travel package must include airfare and accommodation and may include others.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Australia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Australia (n = 365)	Leisure Visitors from Australia (n = 304)
Travel Companions**			
Traveling Alone	61%	50%	39%
Spouse/Partner	21%	35%	44%
Family/Relatives	13%	14%	17%
Friends	6%	8%	10%
Business Associates	4%	1%	-
Tour Group	1%	-	-
Average Travel Party Size	1.6	1.7	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	86%	87%
Private Home	27%	13%	12%
Other	6%	5%	6%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	24.9 nights	24.6 nights
Mean Nights in California	12.2 nights	10.8 nights	9.3 nights
% of California Nights	54%	43%	38%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	44%	49%
Average Trips to the U.S. in Past Year	1.7 trips	1.2 trips	1.1 trips
Average Number of States Visited	2.0 states	3.0 states	3.1 states
Average Number of Destinations Visited	3.0 dest.	4.0 dest.	4.3 dest.
Places Visited in the U.S.**			
Los Angeles	59%	67%	70%
San Francisco	47%	42%	44%
Las Vegas	30%	51%	57%
New York City	16%	38%	43%
San Diego	13%	13%	12%
Anaheim-Santa Ana	8%	18%	21%
Flagstaff-Grand Canyon-Sedona	7%	6%	6%
San Jose	6%	2%	<1%
DC Metro Area	4%	7%	8%
Monterey-Salinas	4%	2%	2%
Oahu	4%	24%	27%
Santa Barbara	3%	1%	2%
Riverside/San Bernardino	3%	2%	2%
Chicago	3%	5%	5%
Seattle	3%	5%	4%
Sacramento	3%	1%	1%
Miami	3%	7%	8%

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** Multiple response question. Table may add to more than 100%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Australia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Australia (n = 365)	Leisure Visitors from Australia (n = 304)
Activities Experienced While in the U.S.**			
Shopping	88%	96%	96%
Sightseeing	84%	93%	96%
National Parks/Monuments	49%	66%	69%
Experience Fine Dining	43%	55%	56%
Small Towns/Countryside	41%	47%	52%
Amusement/Theme Parks	38%	53%	60%
Historical Locations	37%	54%	60%
Guided Tours	33%	62%	68%
Art Gallery/Museums	30%	42%	46%
Casino/Gamble	25%	43%	49%
Cultural/Ethnic Heritage Sites	21%	28%	31%
Concert/Play/Musical	20%	42%	48%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	80%	84%
Rented Auto	43%	39%	41%
Auto, Private or Company	37%	41%	42%
City Subway/Tram/Bus	33%	53%	54%
Taxicab/Limousine	33%	58%	58%
Bus between Cities	18%	26%	28%
Ferry/River Taxi/Srt. Scenic Cruise	12%	29%	32%
Railroad between Cities	8%	13%	13%
Rented Bicycle/Motorcycle/Moped	5%	6%	6%
Cruise Ship/River Boat 1+ Nights	4%	11%	13%
Motor Home/Camper	2%	1%	1%
Visitor Spending in the U.S.***			
CA Visitor Spending in the U.S. per Visitor Per Visitor Per Day (CA)	\$3,577 \$159	\$4,129 \$166	\$4,336 \$176
Per Visitor/Trip (California)	\$1,940	\$1,791	\$1,639
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	26.1%	24.4%
Air Transportation in the U.S.	6.9%	8.8%	9.5%
Entertainment	12.2%	16.9%	18.1%
Food/Beverages	17.8%	21.6%	20.1%
Gifts/Souvenirs	21.9%	19.7%	21.0%
Ground Transportation in the U.S.	5.6%	3.8%	3.6%
Other	6.3%	3.0%	3.3%

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

** Multiple response question. The column may sum to more than 100%.

*** Spending estimates were based on the SIAT data and revised by Tourism Economics for Visit California.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."
CIC Research, Inc. and Tourism Economics

**Characteristics of Travelers from Australia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Australia (n = 365)	Leisure Visitors from Australia (n = 304)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	35%	33%
Cash from Home/Travelers Checks	26%	19%	21%
Cash Adv./Withdrawal Using Credit Card	18%	16%	13%
Cash Adv./Withdrawal Using Debit Card	7%	16%	18%
Purchases Using Debit Card	6%	15%	16%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	44 years	45 years
Average Age - Females	39 years	40 years	39 years
Occupation			
Mgmt., Business, Science, & Arts	44%	41%	41%
Service Occupations	11%	6%	6%
Student	11%	7%	6%
Sales and Office	10%	13%	11%
Retired	8%	14%	15%
Homemaker	5%	5%	5%
Prod., Trans., & Material Moving	4%	3%	4%
Military/Government	4%	6%	7%
Nat. Res., Const., & Maintenance	3%	5%	6%
Other	2%	<1%	<1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	6%	6%
\$20,000 - \$39,999	14%	8%	8%
\$40,000 - \$59,999	14%	13%	13%
\$60,000 - \$79,999	12%	12%	11%
\$80,000 - \$99,999	10%	12%	13%
\$100,000 - \$119,999	8%	8%	8%
\$120,000 - \$139,999	6%	6%	6%
\$140,000 - \$159,999	5%	9%	10%
\$160,000 - \$179,999	3%	3%	3%
\$180,000 - \$199,999	3%	6%	4%
\$200,000 and over	12%	18%	19%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$125,395	\$125,348

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Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."