

CHARACTERISTICS OF TRAVELERS FROM INDIA TO CALIFORNIA – 2015

India was one of California’s large overseas markets with approximately 291,000 visitors to California in 2015. Collectively visitors from India spent approximately \$595 million in California.

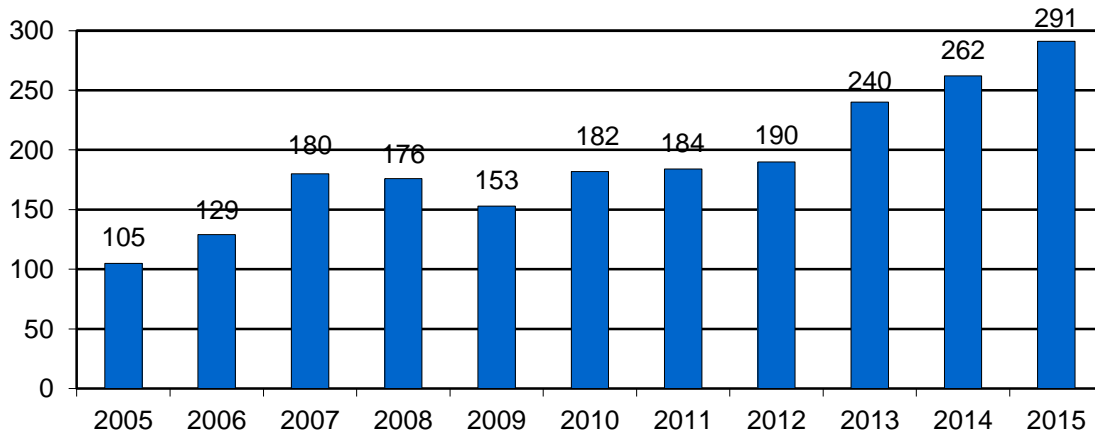
Indian visitors to California during 2015 reported spending \$127 per day during a 16.1 night average stay or approximately \$2,043 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors From India

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	344,926	30.4%	105,000
2006	406,845	31.7%	129,000
2007	567,045	31.7%	180,000
2008	598,971	29.4%	176,000
2009	549,474	27.8%	153,000
2010	650,935	28.0%	182,000
2011	663,465	27.7%	184,000
2012	724,433	26.2%	190,000
2013	859,156	27.9%	240,000
2014 ³	961,790	27.2%	262,000
2015 ³	1,057,650	27.5%	291,000

- 1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.
- 2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."
- 3) Sourced from Tourism Economics.

Number of Visitors from India to CA, 2005-2015 (in 000s)



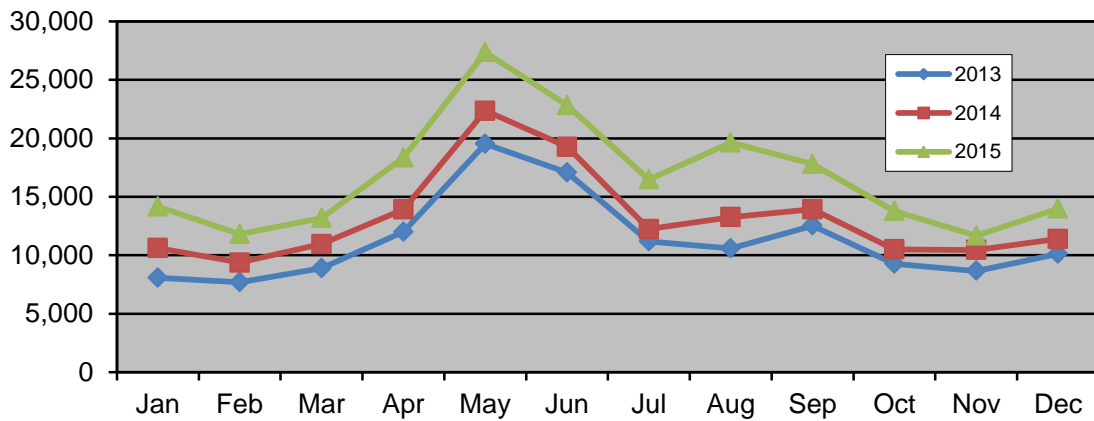
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,
Revised by Tourism Economics for Visit California (October, 2015).

Since the middle of the 1990s India has grown consistently as a source of visitors to California from just 41,000 to a current peak of 291,000 visitors in 2015.

Indian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from India to California were higher in 2015 compared with 2014 and 2013. In all years, Indian resident arrivals at California ports-of-entry peaked in May. The lowest volumes were recorded in February and November.

**Residents of India
Monthly Port of Entry Arrivals to CA
2013-2015**



Sources: 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 India 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 India are more likely to:

- Travel to California for business or convention purposes
- Use a corporate travel department for trip planning as well as booking their air trip
- Have shorter trip planning and advance airline booking horizons
- Travel alone
- Stay longer in the U.S. and California
- Visit San Jose
- Use air travel between U.S. cities or a taxicab/limousine for transportation while in the U.S.
- Spend while in the U.S., including a greater proportion of their travel dollar on accommodation*
- Work in a management/business/science & arts occupation
- Have a lower average annual household income

Conversely, visitors from India are less likely to:

- Travel to California for vacation/holiday purposes
- Plan their trip with information from an online travel agency
- Book their air travel with the airlines directly
- Mention non-stop flights as the main factor in selecting an airline
- Stay in a hotel or other paid lodging
- Visit Los Angeles or Las Vegas
- Experience leisure activities while in the U.S.
- Use a rented auto for transportation while in the U.S.
- Spend per visitor per day in California, as well as to spend a proportion of their travel dollar on food/beverages as well as gifts/souvenirs while in the U.S.*

*Caution- Small Sample Size

Characteristics of Travelers from India to California – 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from India (n = 339)	Leisure Visitors from India (n = 123)
Primary Purpose of Trip			
Vacation/Holidays	54%	17%	37%
Visit Friends/Relatives	18%	29%	63%
Business	13%	36%	-
Convention/Conference	9%	15%	-
Other Purpose	6%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	29%	53%
Visit Friends/Relatives	34%	37%	73%
Business	17%	44%	4%
Convention/Conference	12%	24%	-
Sources Used to Plan Trip**			
Airline	43%	47%	57%
Online Travel Agency	34%	24%	27%
Personal Recommendation	29%	28%	41%
Travel Agency Office	23%	21%	26%
Travel Guide	15%	11%	17%
Corporate Travel Department	12%	39%	11%
Tour Operator/Travel Club	9%	12%	17%
National/State/City Travel Office	7%	8%	9%
Advance Planning for Trip			
7 days or less	5%	10%	3%
8 - 30 days	24%	38%	19%
31 - 60 days	19%	25%	28%
61 - 90 days	15%	10%	17%
More than 3 Months	38%	16%	33%
Total	100%	100%	100%
Average Planning Time in Days	108 days	58 days	91 days
Advance Airline Reservations			
7 days or less	8%	18%	7%
8 - 30 days	33%	46%	33%
31 - 60 days	20%	18%	26%
61 - 90 days	13%	6%	13%
91 - 120 days	9%	6%	11%
121 - 180 days	10%	4%	9%
6 Months or More	8%	1%	2%
Total	100%	100%	100%
Average Booking in Days	76 days	41 days	67 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 India to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from India (n = 339)	Leisure Visitors from India (n = 123)
Means of Booking Air Trip**			
Airlines Directly	31%	17%	24%
Internet Booking Service	29%	21%	25%
Travel Agency Office	26%	24%	39%
Corporate Travel Department	12%	37%	2%
Tour Operator/Travel Club	9%	10%	15%
Other	1%	1%	2%
Main Factor in Selecting Airline			
Airfare	29%	36%	46%
Non-Stop Flights	17%	5%	9%
Convenient Schedule	15%	21%	15%
Previous Good Experience	9%	11%	10%
Mileage Bonus/Frequent Flyer Program	8%	1%	2%
Safety Reputation	9%	3%	4%
Loyalty to Carrier	3%	3%	6%
In-flight Service Reputation	3%	3%	3%
Employer policy	3%	8%	1%
On-time Reputation	2%	3%	2%
Other	3%	5%	3%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	88%	95%
Premium Economy	10%	7%	2%
Executive/Business	8%	5%	3%
First Class	1%	<1%	-
Total	100%	100%	100%
Use of Package			
Yes	14%	12%	9%
No	86%	88%	91%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	4%	9%
Meals	6%	7%	9%
Bus/Coach	6%	5%	9%
Guided Tours	6%	4%	9%
Rental Car	4%	2%	2%
Tour Guide for Entire Trip	5%	3%	8%
Airfare and Accommodation Only	3%	4%	-
Cruise	2%	2%	4%
Recreation	1%	2%	4%

* 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 India to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from India (n = 339)	Leisure Visitors from India (n = 123)
Travel Companions**			
Traveling Alone	59%	74%	40%
Spouse/Partner	22%	16%	42%
Family/Relatives	15%	8%	21%
Friends	6%	1%	<1%
Business Associates	4%	4%	-
Tour Group	1%	<1%	1%
Average Travel Party Size	1.7	1.4	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	73%	63%	41%
Private Home	32%	40%	69%
Other	6%	8%	9%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	34.6 nights	49.0 nights
Mean Nights in California	12.6 nights	16.1 nights	19.6 nights
% of California Nights	52%	47%	40%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	31%	36%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
Average Number of States Visited	2.0 states	2.1 states	2.6 states
Average Number of Destinations Visited	3.1 dest.	2.7 dest.	3.5 dest.
Places Visited in the U.S.**			
Los Angeles	60%	37%	54%
San Francisco	45%	47%	48%
Las Vegas	30%	18%	31%
New York City	15%	20%	35%
San Diego	14%	11%	10%
Anaheim-Santa Ana	8%	4%	4%
Flagstaff-Grand Canyon-Sedona	7%	4%	6%
San Jose	6%	24%	21%
DC Metro Area	5%	9%	16%
Monterey-Salinas	5%	1%	1%
Santa Barbara	4%	-	-
Riverside/San Bernardino	4%	1%	1%
Oahu	3%	-	-
Seattle	3%	4%	3%
Chicago	3%	4%	8%
Miami	2%	4%	6%
Sacramento	2%	4%	7%

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**Characteristics of Travelers from India to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from India (n = 339)	Leisure Visitors from India (n = 123)
Activities Experienced While in the U.S.**			
Shopping	87%	78%	77%
Sightseeing	83%	79%	90%
National Parks/Monuments	51%	34%	50%
Small Towns/Countryside	42%	29%	39%
Experience Fine Dining	40%	24%	27%
Amusement/Theme Parks	39%	34%	55%
Historical Locations	34%	18%	26%
Guided Tours	31%	27%	44%
Art Gallery/Museums	33%	23%	34%
Casino/Gamble	24%	13%	20%
Cultural/Ethnic Heritage Sites	20%	9%	14%
Concert/Play/Musical	20%	9%	12%
Transportation While in the U.S.**			
Rented Auto	44%	13%	8%
Air Travel between U.S. Cities	44%	56%	77%
Auto, Private or Company	37%	31%	32%
City Subway/Tram/Bus	31%	26%	25%
Taxicab/Limousine	31%	46%	30%
Bus between Cities	19%	25%	38%
Ferry/River Taxi/Srt. Scenic Cruise	10%	8%	15%
Railroad between Cities	7%	9%	5%
Rented Bicycle/Motorcycle/Moped	5%	3%	5%
Cruise Ship/River Boat 1+ Nights	4%	5%	10%
Motor Home/Camper	2%	4%	10%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$4,777	\$3,472
Per Visitor Per Day (CA)	\$157	\$127	\$59
Per Visitor/Trip (California)	\$1,979	\$2,043	\$1,158
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	48.2%	19.3%
Air Transportation in the U.S.	5.9%	9.2%	6.2%
Entertainment	12.9%	8.6%	16.1%
Food/Beverages	19.9%	12.7%	14.0%
Gifts/Souvenirs	19.2%	11.8%	30.5%
Ground Transportation in the U.S.	6.3%	7.9%	9.5%
Other	4.2%	1.6%	4.3%

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** Multiple response question. Table may add 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 India to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from India (n = 339)	Leisure Visitors from India (n = 123)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	37%	20%
Cash from Home/Travelers Checks	27%	28%	44%
Cash Adv./Withdrawal Using Credit Card	18%	21%	19%
Cash Adv./Withdrawal Using Debit Card	6%	7%	7%
Purchases Using Debit Card	6%	7%	10%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	40 years	54 years
Average Age - Females	38 years	40 years	45 years
Occupation			
Mgmt., Business, Science & Arts	46%	59%	36%
Service Occupations	11%	13%	15%
Student	12%	6%	6%
Sales and Office	11%	4%	3%
Retired	8%	14%	31%
Homemaker	4%	2%	4%
Prod., Trans., & Material Moving	3%	1%	2%
Military/Government	3%	1%	2%
Nat. Res., Const., & Maintenance	3%	-	-
Other	1%	-	-
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	33%	50%
\$20,000 - \$39,999	15%	19%	15%
\$40,000 - \$59,999	15%	14%	6%
\$60,000 - \$79,999	14%	12%	10%
\$80,000 - \$99,999	10%	3%	4%
\$100,000 - \$119,999	10%	6%	7%
\$120,000 - \$139,999	4%	3%	-
\$140,000 - \$159,999	4%	5%	3%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	1%	1%	-
\$200,000 and over	10%	4%	7%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$59,919	\$57,388

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