

CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA – 2015

In 2015, Australia was California’s third largest overseas market to California with approximately 610,000 visitors to California. It was surpassed by the U.K with 705,000 visitors and by China with 1,162,000. Collectively, visitors from Australia spent approximately \$977 million in California.

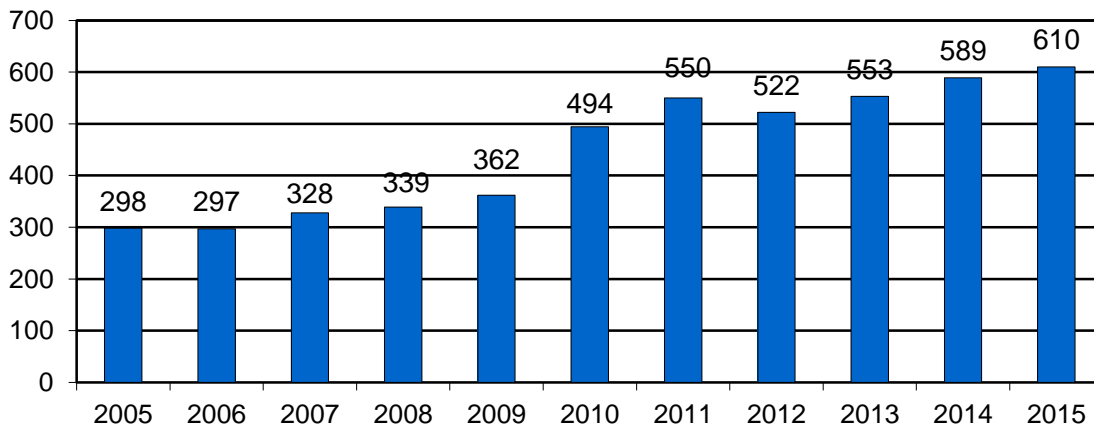
Australian visitors to California during 2015 reported spending \$169 per day during a 9.5 night average stay or approximately \$1,602 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors from Australia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2014 ³	1,276,124	46.1%	589,000
2015 ³	1,387,620	43.9%	610,000

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

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



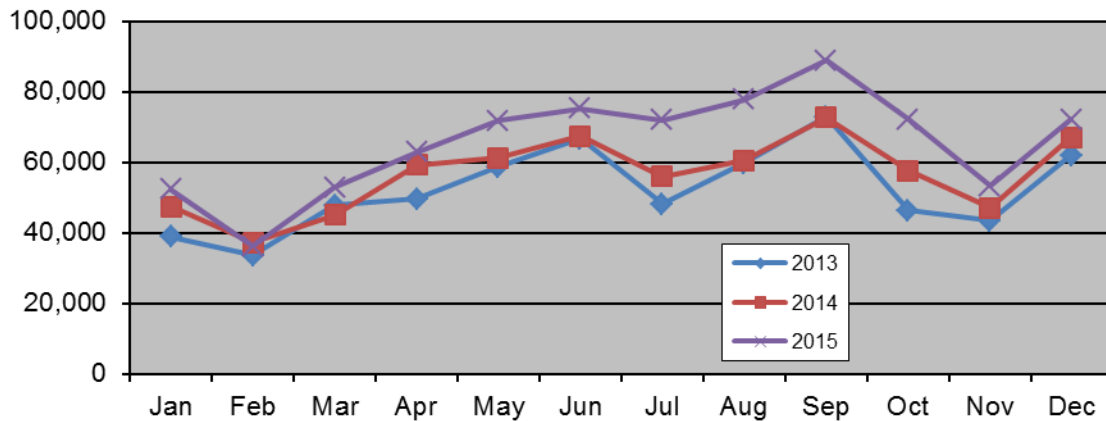
Source: U.S. Dept. of Commerce, National Travel and Tourism Office, Survey of International Air Travelers. Revised by Tourism Economics for Visit California (October, 2015).

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 610,000 visitors in 2015 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 mostly higher in 2015 than in 2013 and 2014. Australian resident arrivals at California ports-of-entry have demonstrated consistent peaks in June, September and December. The lowest volumes of arrivals were recorded in February each year.

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



Source: U.S. Department of Homeland Security, I-94 International Arrival Records.
CIC Research, Inc.
Visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

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 or a personal recommendation as a trip planning source
- Have a decidedly longer trip planning and advance airline booking horizon
- Book their air trip through a travel agency office
- Travel with their spouse/partner
- Stay in a hotel / motel in the U.S.
- Be on their first trip to the U.S.
- Visit Los Angeles, Las Vegas, New York City, and Anaheim-Santa Ana while in the U.S.
- Engage in multiple leisure activities
- Make use of air travel between U.S cities, taxicabs/limousines, a bus between cities, and city subway/tram/bus as means of transportation while in the U.S.
- Spend more while in the U.S.
- Spend more per visitor per day while in California
- Pay for trip expenses with a debit card
- Have a higher average annual income

Conversely, visitors from Australia are less likely to:

- Travel to California for business/professional purposes or to visit friends/relatives
- Choose an airline based on non-stop flights as a main factor
- Spend nights in California as part of their trip to the U.S.
- Stay in a private home
- Pay for trip expenses with a credit card or with cash from home/travelers checks

Characteristics of Travelers from Australia to California, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Australia (n = 540)	Leisure Visitors from Australia (n = 429)
Primary Purpose of Trip			
Vacation/Holidays	54%	72%	85%
Visit Friends/Relatives	18%	13%	15%
Business	13%	6%	-
Convention/Conference	9%	6%	-
Other Purpose	6%	4%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	84%	92%
Visit Friends/Relatives	34%	32%	32%
Business	17%	8%	1%
Convention/Conference	12%	9%	2%
Sources Used to Plan Trip**			
Airline	43%	46%	49%
Online Travel Agency	34%	43%	45%
Personal Recommendation	29%	40%	44%
Travel Agency Office	23%	42%	45%
Travel Guide	15%	11%	11%
Corporate Travel Department	12%	7%	3%
Tour Operator/Travel Club	9%	8%	8%
National/State/City Travel Office	7%	5%	5%
Advance Planning for Trip			
7 days or less	5%	2%	1%
8 - 30 days	24%	10%	8%
31 - 60 days	19%	11%	9%
61 - 90 days	15%	15%	16%
More than 3 Months	38%	62%	66%
Total	100%	100%	100%
Average Planning Time in Days	108 days	173 days	183 days
Advance Airline Reservations			
7 days or less	8%	3%	2%
8 - 30 days	33%	20%	15%
31 - 60 days	20%	14%	14%
61 - 90 days	13%	14%	13%
91 - 120 days	9%	14%	17%
121 - 180 days	10%	17%	20%
6 Months or More	8%	19%	21%
Total	100%	100%	100%
Average Booking in Days	76 days	118 days	128 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Australia (n = 540)	Leisure Visitors from Australia (n = 429)
Means of Booking Air Trip**			
Airlines Directly	31%	27%	29%
Internet Booking Service	29%	29%	30%
Travel Agency Office	26%	41%	43%
Corporate Travel Department	12%	6%	2%
Tour Operator/Travel Club	9%	4%	4%
Other	1%	1%	1%
Main Factor in Selecting Airline			
Airfare	29%	34%	38%
Non-Stop Flights	17%	9%	8%
Convenient Schedule	15%	14%	13%
Previous Good Experience	9%	12%	13%
Mileage Bonus/Frequent Flyer Program	8%	7%	7%
Safety Reputation	9%	11%	11%
Loyalty to Carrier	3%	4%	4%
In-flight Service Reputation	3%	2%	1%
Employer policy	3%	1%	-
On-time Reputation	2%	3%	3%
Other	3%	4%	3%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	89%	90%
Premium Economy	10%	6%	5%
Executive/Business	8%	4%	5%
First Class	1%	1%	<1%
Total	100%	100%	100%
Use of Package			
Yes	14%	9%	8%
No	86%	92%	92%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	5%	6%
Meals	6%	4%	5%
Bus/Coach	6%	7%	7%
Guided Tours	6%	6%	5%
Rental Car	4%	<1%	<1%
Tour Guide for Entire Trip	5%	3%	3%
Airfare and Accommodation Only	3%	1%	6%
Cruise	2%	2%	2%
Recreation	1%	1%	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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Australia (n = 540)	Leisure Visitors from Australia (n = 429)
Travel Companions**			
Traveling Alone	59%	55%	48%
Spouse/Partner	22%	30%	36%
Family/Relatives	15%	13%	16%
Friends	6%	7%	9%
Business Associates	4%	1%	-
Tour Group	1%	1%	1%
Average Travel Party Size	1.7	1.7	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	73%	82%	82%
Private Home	32%	21%	19%
Other	6%	9%	9%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	23.7 nights	22.3 nights
Mean Nights in California	12.6 nights	9.5 nights	7.0 nights
% of California Nights	52%	40%	31%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	34%	35%
Average Trips to the U.S. in Past Year	1.7 trips	1.3 trips	1.3 trips
Average Number of States Visited	2.0 states	2.7 states	2.8 states
Average Number of Destinations Visited	3.1 dest.	3.6 dest.	3.9 dest.
Places Visited in the U.S.**			
Los Angeles	60%	69%	70%
San Francisco	45%	38%	38%
Las Vegas	30%	39%	45%
New York City	15%	31%	33%
San Diego	14%	14%	15%
Anaheim-Santa Ana	8%	16%	18%
Flagstaff-Grand Canyon-Sedona	7%	3%	4%
San Jose	6%	4%	3%
DC Metro Area	5%	7%	8%
Monterey-Salinas	5%	2%	2%
Santa Barbara	4%	3%	3%
Riverside/San Bernardino	4%	3%	3%
Oahu	3%	11%	13%
Seattle	3%	5%	6%
Chicago	3%	5%	5%
Miami	2%	5%	5%
Sacramento	2%	1%	1%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Australia (n = 540)	Leisure Visitors from Australia (n = 429)
Activities Experienced While in the U.S.**			
Shopping	87%	94%	95%
Sightseeing	83%	96%	98%
National Parks/Monuments	51%	65%	69%
Small Towns/Countryside	42%	47%	50%
Experience Fine Dining	40%	46%	46%
Amusement/Theme Parks	39%	56%	59%
Historical Locations	34%	52%	53%
Guided Tours	31%	60%	63%
Art Gallery/Museums	33%	49%	48%
Casino/Gamble	24%	37%	40%
Cultural/Ethnic Heritage Sites	20%	32%	33%
Concert/Play/Musical	20%	43%	44%
Transportation While in the U.S.**			
Rented Auto	44%	38%	39%
Air Travel between U.S. Cities	44%	70%	72%
Auto, Private or Company	37%	38%	38%
City Subway/Tram/Bus	31%	49%	50%
Taxicab/Limousine	31%	51%	50%
Bus between Cities	19%	31%	33%
Ferry/River Taxi/Srt. Scenic Cruise	10%	17%	18%
Railroad between Cities	7%	12%	12%
Rented Bicycle/Motorcycle/Moped	5%	8%	8%
Cruise Ship/River Boat 1+ Nights	4%	15%	17%
Motor Home/Camper	2%	3%	3%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,725	\$3,753
Per Visitor Per Day (CA)	\$157	\$169	\$184
Per Visitor/Trip (California)	\$1,979	\$1,602	\$1,616
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	31.3%	28.9%
Air Transportation in the U.S.	5.9%	7.1%	6.6%
Entertainment	12.9%	15.8%	16.8%
Food/Beverages	19.9%	21.8%	22.2%
Gifts/Souvenirs	19.2%	15.2%	16.6%
Ground Transportation in the U.S.	6.3%	6.1%	5.9%
Other	4.2%	2.7%	3.0%

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** 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Australia (n = 540)	Leisure Visitors from Australia (n = 429)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	32%	30%
Cash from Home/Travelers Checks	27%	19%	19%
Cash Adv./Withdrawal Using Credit Card	18%	15%	15%
Cash Adv./Withdrawal Using Debit Card	6%	14%	15%
Purchases Using Debit Card	6%	19%	21%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	40 years	40 years
Average Age - Females	38 years	39 years	40 years
Occupation			
Mgmt., Business, Science & Arts	46%	44%	40%
Service Occupations	11%	9%	10%
Student	12%	10%	8%
Sales and Office	11%	13%	14%
Retired	8%	11%	12%
Homemaker	4%	2%	3%
Prod., Trans., & Material Moving	3%	3%	3%
Military/Government	3%	3%	2%
Nat. Res., Const., & Maintenance	3%	6%	7%
Other	1%	1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	5%	4%
\$20,000 - \$39,999	15%	8%	8%
\$40,000 - \$59,999	15%	16%	16%
\$60,000 - \$79,999	14%	15%	15%
\$80,000 - \$99,999	10%	11%	12%
\$100,000 - \$119,999	10%	14%	15%
\$120,000 - \$139,999	4%	4%	5%
\$140,000 - \$159,999	4%	5%	4%
\$160,000 - \$179,999	3%	6%	5%
\$180,000 - \$199,999	1%	3%	3%
\$200,000 and over	10%	12%	13%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$110,254	\$110,395

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

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