

## CHARACTERISTICS OF TRAVELERS FROM INDIA TO CALIFORNIA – 2014

India was one of California’s large overseas markets with approximately 262,000 visitors to California in 2014. Collectively visitors from India spent approximately \$481 million in California.

Indian visitors to California during 2014 reported spending \$115 per day during a 15.9 night average stay or approximately \$1,835 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

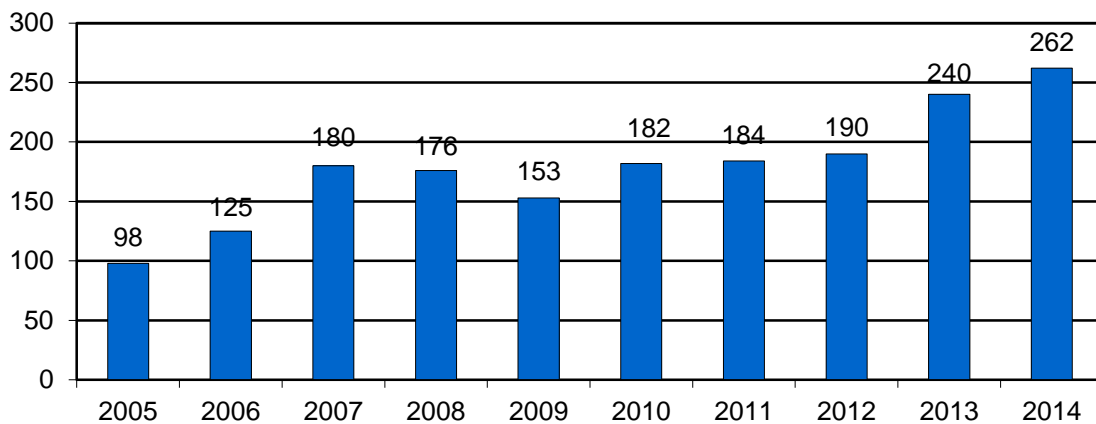
### Visitors From India

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2004	308,845	35.9%	111,000
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	961,780	27.2%	262,000

1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.

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

### Number of Visitors from India to CA, 2005-2014 (in 000s)

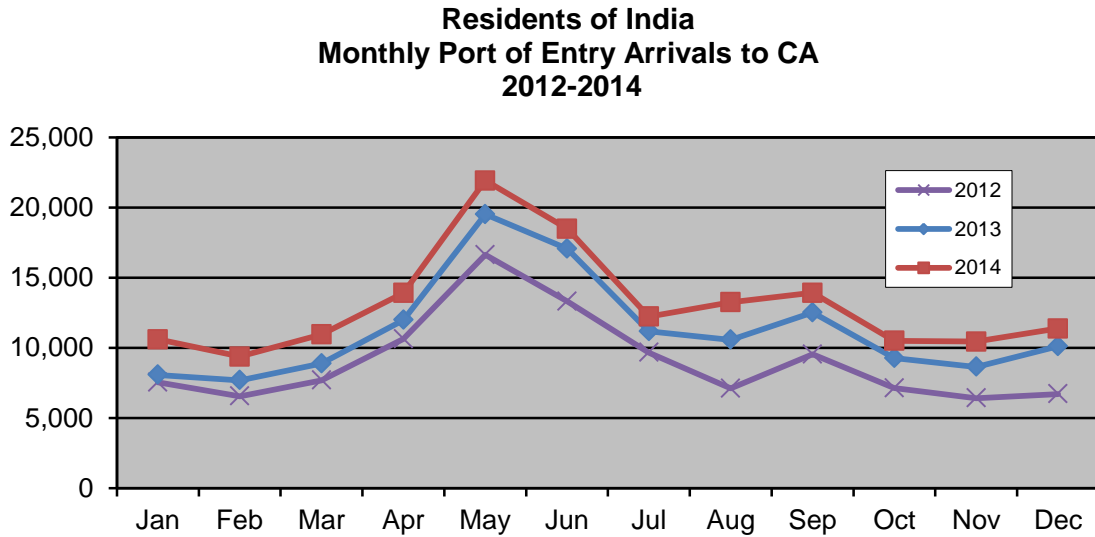


Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

Since the middle of the 1990s India has grown dramatically as a source of visitors to California from just 41,000 to a current peak of 262,000 visitors in 2014.

### Indian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from India to California were higher in 2014 compared with 2013 and 2012. In all years, Indian resident arrivals at California ports-of-entry peaked in May. The lowest volumes were recorded in January, February and November.



Sources: 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 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
- Select an airline due to a convenient schedule
- Travel alone
- Stay longer in the U.S. and California
- Be on their first trip to the U.S.
- Visit San Jose
- Use 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 or an internet booking service
- 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
- Use a rented auto, or a company or private auto for transportation while in the U.S.
- Experience most of the listed activities while in the U.S.
- Spend per visitor per day in California, as well as to spend a proportion of their travel dollar on gifts/souvenirs while in the U.S.\*

\*Caution- Small Sample Size

## Characteristics of Travelers from India to California – 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from India (n = 270)	Leisure Visitors from India (n = 105)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	19%	42%
Visit Friends/Relatives	18%	26%	58%
Business	13%	35%	-
Convention/Conference	8%	15%	-
Other Purpose	7%	5%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	66%	36%	57%
Visit Friends/Relatives	34%	37%	66%
Business	18%	37%	<1%
Convention/Conference	12%	22%	<1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	39%	45%
Online Travel Agency	32%	20%	19%
Travel Agency Office	25%	24%	25%
Personal Recommendation	29%	27%	45%
Travel Guide	15%	8%	10%
Corporate Travel Department	12%	34%	4%
Tour Operator/Travel Club	10%	10%	20%
National/State/City Travel Office	8%	5%	6%
<b>Advance Planning for Trip</b>			
7 days or less	5%	14%	4%
8 - 30 days	25%	34%	24%
31 - 60 days	19%	22%	24%
61 - 90 days	15%	21%	32%
More than 3 Months	36%	10%	17%
Total	100%	100%	100%
Average Planning Time in Days	106 days	53 days	73 days
<b>Advance Airline Reservations</b>			
7 days or less	9%	22%	10%
8 - 30 days	35%	41%	36%
31 - 60 days	19%	21%	24%
61 - 90 days	12%	11%	22%
91 - 120 days	8%	3%	5%
121 - 180 days	10%	3%	2%
6 Months or More	8%	-	-
Total	100%	100%	100%
Average Booking in Days	74 days	37 days	51 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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from India (n = 270)	Leisure Visitors from India (n = 105)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	29%	28%	38%
Airlines Directly	29%	18%	29%
Internet Booking Service	27%	16%	21%
Corporate Travel Department	12%	34%	5%
Tour Operator/Travel Club	10%	9%	16%
Other	1%	<1%	-
<b>Main Factor in Selecting Airline</b>			
Airfare	31%	27%	26%
Non-Stop Flights	19%	7%	6%
Convenient Schedule	14%	31%	31%
Previous Good Experience	8%	15%	14%
Mileage Bonus/Frequent Flyer Program	6%	3%	3%
Safety Reputation	6%	<1%	1%
Loyalty to Carrier	3%	3%	5%
In-flight Service Reputation	3%	3%	5%
Employer policy	2%	6%	3%
On-time Reputation	2%	1%	1%
Other	5%	4%	6%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	83%	86%	87%
Premium Economy	9%	9%	10%
Executive/Business	8%	5%	3%
First Class	1%	-	<1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	13%	10%
No	85%	87%	90%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	7%	5%	7%
Bus/Coach	6%	4%	7%
Guided Tours	6%	3%	5%
Meals	6%	7%	7%
Rental Car	5%	4%	4%
Tour Guide for Entire Trip	4%	2%	4%
Airfare and Accommodation Only	2%	3%	2%
Cruise	2%	2%	5%
Recreation	2%	1%	2%

\* 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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from India (n = 270)	Leisure Visitors from India (n = 105)
<b>Travel Companions**</b>			
Traveling Alone	59%	78%	55%
Spouse/Partner	22%	15%	34%
Family/Relatives	15%	8%	16%
Friends	6%	1%	1%
Business Associates	3%	2%	-
Tour Group	1%	<1%	<1%
<b>Average Travel Party Size</b>	1.7	1.3	1.7
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	73%	53%
Private Home	30%	33%	56%
Other	6%	3%	3%
<b>Length of Stay</b>			
Mean Nights in the U.S.	23.4 nights	41.5 nights	50.5 nights
Mean Nights in California	12.2 nights	15.9 nights	18.5 nights
% of California Nights	52%	38%	37%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	38%	39%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.2 trips
<b>Average Number of States Visited</b>	2.1 states	2.0 states	2.3 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	2.6 dest.	3.1 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	62%	44%	60%
San Francisco	44%	44%	42%
Las Vegas	29%	19%	30%
New York City	16%	14%	22%
San Diego	14%	9%	15%
Anaheim-Santa Ana	8%	5%	3%
Flagstaff-Grand Canyon-Sedona	7%	2%	2%
San Jose	6%	20%	15%
Monterey-Salinas	5%	2%	1%
DC Metro Area	4%	4%	7%
Riverside/San Bernardino	4%	<1%	-
Santa Barbara	4%	1%	2%
Chicago	3%	3%	6%
Oahu	3%	1%	2%
Seattle	3%	4%	7%
Sacramento	3%	2%	1%
Miami	3%	3%	4%

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

**Characteristics of Travelers from India to California  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from India (n = 270)	Leisure Visitors from India (n = 105)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	89%	80%	78%
Sightseeing	83%	81%	91%
National Parks/Monuments	52%	38%	57%
Small Towns/Countryside	44%	34%	44%
Experience Fine Dining	43%	27%	26%
Amusement/Theme Parks	40%	31%	52%
Historical Locations	35%	24%	27%
Guided Tours	33%	21%	27%
Art Gallery/Museums	31%	24%	32%
Casino/Gamble	24%	15%	24%
Concert/Play/Musical	21%	11%	16%
Cultural/Ethnic Heritage Sites	20%	12%	7%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	45%	52%	71%
Rented Auto	44%	17%	10%
Auto, Private or Company	38%	29%	28%
City Subway/Tram/Bus	31%	33%	31%
Taxicab/Limousine	31%	42%	24%
Bus between Cities	19%	27%	30%
Ferry/River Taxi/Srt. Scenic Cruise	10%	9%	7%
Railroad between Cities	7%	11%	4%
Rented Bicycle/Motorcycle/Moped	5%	1%	-
Cruise Ship/River Boat 1+ Nights	4%	4%	4%
Motor Home/Camper	2%	6%	14%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$4,790	\$4,872
Per Visitor Per Day (CA)	\$153	\$115	\$96
Per Visitor/Trip (California)	\$1,872	\$1,835	\$1,785
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	30.4%	40.8%	22.9%
Air Transportation in the U.S.	6.6%	11.3%	8.2%
Entertainment	12.5%	7.9%	13.2%
Food/Beverages	18.1%	14.3%	17.0%
Gifts/Souvenirs	21.1%	11.3%	17.4%
Ground Transportation in the U.S.	6.2%	8.4%	6.1%
Other	4.9%	5.3%	15.3%

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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  
(2014 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	45%	28%
Cash from Home/Travelers Checks	27%	23%	52%
Cash Adv./Withdrawal Using Credit Card	18%	18%	16%
Cash Adv./Withdrawal Using Debit Card	6%	8%	3%
Purchases Using Debit Card	6%	6%	1%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	40 years	40 years	48 years
Average Age - Females	38 years	43 years	49 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	44%	56%	40%
Service Occupations	11%	20%	20%
Student	11%	5%	8%
Sales and Office	11%	5%	4%
Retired	8%	5%	10%
Homemaker	4%	6%	15%
Prod., Trans., & Material Moving	4%	1%	2%
Nat. Res., Const., & Maintenance	3%	1%	2%
Military/Government	2%	1%	1%
Other	2%	<1%	-
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	39%	43%
\$20,000 - \$39,999	13%	13%	13%
\$40,000 - \$59,999	14%	14%	11%
\$60,000 - \$79,999	11%	8%	3%
\$80,000 - \$99,999	10%	7%	4%
\$100,000 - \$119,999	9%	6%	14%
\$120,000 - \$139,999	6%	2%	5%
\$140,000 - \$159,999	4%	2%	-
\$160,000 - \$179,999	3%	2%	5%
\$180,000 - \$199,999	2%	1%	-
\$200,000 and over	11%	5%	3%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$52,195	\$53,504

\* 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."