

## CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA – 2010

Australia was California’s third largest overseas market with approximately 502,000 visitors to California in 2010. Collectively visitors from Australia spent approximately \$589 million in California.

Australian visitors to California during 2010 reported spending \$129 per day during a 9.1 night average stay or approximately \$1,174 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

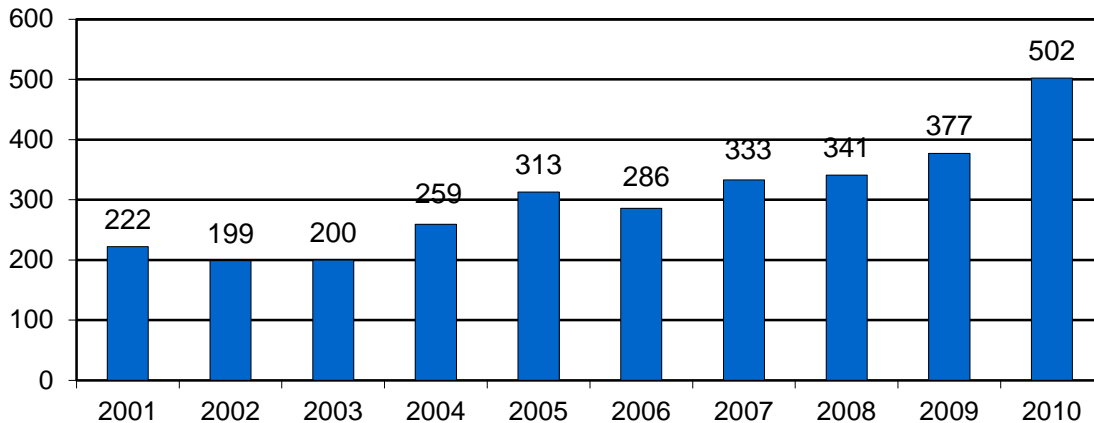
### Visitors From Australia

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2000	539,559	60.7%	328,000
2001	425,934	52.1%	222,000
2002	407,130	49.0%	199,000
2003	405,698	49.4%	200,000
2004	519,955	49.8%	259,000
2005	581,773	53.8%	313,000
2006	603,275	47.4%	286,000
2007	669,536	49.8%	333,000
2008	689,927	49.4%	341,000
2009	723,576	52.1%	377,000
2010	904,247	55.5%	502,000

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

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

### Number of Visitors from Australia to CA, 2001-2010 (in 000s)



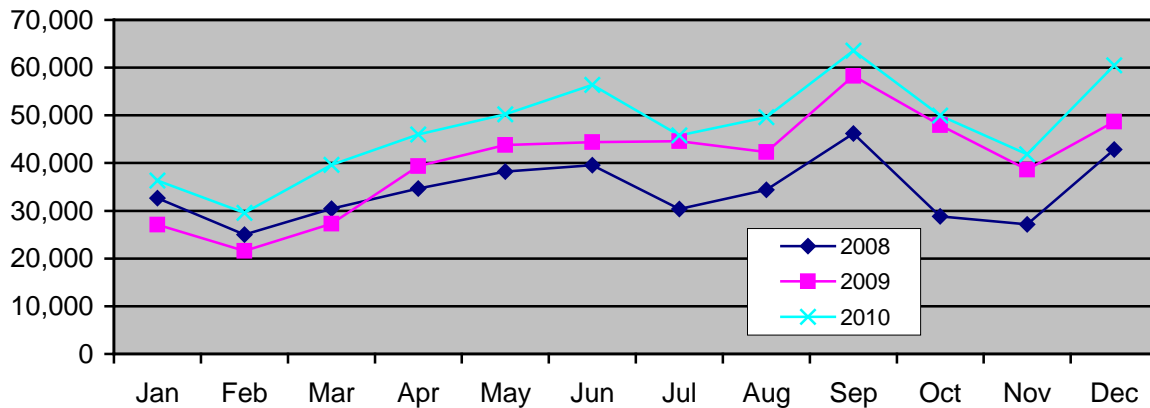
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 502,000 visitors in 2010.

### Australian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Australia to California were higher in 2010 compared with 2008 and 2009. Australian resident arrivals at California ports-of-entry have demonstrated consistent peaks in September and December. The lowest volumes of arrivals were recorded in February each year.

**Residents of Australia  
Monthly Port of Entry Arrivals to CA  
2008-2010**



U.S. Department of Homeland Security, I-94 Form; 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 leisure/recreation/holiday purposes
- Make use of a travel agency as a trip planning source and means of booking air trip
- Have a decidedly longer trip planning and advance airline booking horizon
- Report that an airline's safety reputation was the main factor in selecting the airline
- Travel with their spouse
- Stay in a hotel or motel
- Be on their first trip to the U.S.
- Visit Los Angeles, New York City and the DC Metro area while in the U.S.
- Go sightseeing in cities, visit historical places, visit amusement or theme parks, visit national parks, see cultural heritage sites, tour the countryside, visit art galleries/museums, and go on guided tours
- Make use of a taxi/limousine, and airlines in the U. S. as means of transportation while in the U.S.
- Pay for their trip expenses using debit cards

Conversely, visitors from Australia are less likely to:

- Travel to California for business/professional purposes
- Be traveling alone to the U.S.
- Have a manager/executive occupation

### Characteristics of Travelers from Australia to California, 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Australia (n = 416)	Leisure Visitors from Australia (n = 349)
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	48%	70%	81%
Visit Friends/Relatives	22%	16%	19%
Business/Professional	21%	11%	-
Convention/Conference	5%	1%	-
Other Purpose	5%	1%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	67%	83%	93%
Visit Friends/Relatives	39%	46%	50%
Business/Professional	24%	14%	2%
Convention/Conference	9%	9%	2%
<b>Sources Used to Plan Trip**</b>			
Personal Computer	44%	46%	44%
Travel Agency	40%	60%	60%
Airlines Directly	23%	20%	20%
Friends/Relatives	17%	21%	23%
Travel Guides	10%	11%	12%
Corporate Travel Department	8%	1%	-
Tour Company	5%	3%	4%
State/City Travel Office	4%	2%	3%
Newspapers/Magazines	3%	5%	5%
<b>Advance Planning for Trip</b>			
7 days or less	6%	3%	4%
8 - 30 days	28%	14%	12%
31 - 60 days	20%	15%	9%
61 - 90 days	12%	12%	12%
More than 3 Months	34%	57%	64%
Total	100%	100%	100%
Average Planning Time in Days	98 days	145 days	156 days
<b>Advance Airline Reservations</b>			
7 days or less	12%	6%	6%
8 - 30 days	38%	29%	23%
31 - 60 days	17%	11%	12%
61 - 90 days	10%	15%	16%
91 - 120 days	7%	12%	13%
121 - 180 days	10%	20%	22%
6 Months or More	7%	8%	8%
Total	100%	100%	100%
Average Booking in Days	68 days	92 days	100 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%.

Sources: International Trade Administration Office of Travel and Tourism Industries  
"Survey of International Air Travelers."

**Characteristics of Travelers from Australia to California  
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Australia (n = 416)	Leisure Visitors from Australia (n = 349)
<b>Means of Booking Air Trip</b>			
Travel Agent	46%	65%	65%
Personal Computer	26%	20%	21%
Airlines Directly	13%	12%	12%
Corporate Travel Department	8%	2%	-
Tour Operator	4%	1%	-
Travel Club	1%	-	-
Other/Don't Know	2%	1%	1%
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	32%	36%
Schedule	14%	13%	6%
Non-Stop Flight	14%	5%	6%
Mileage Bonus/Frequent Flyer Program	10%	7%	7%
Previous Good Experience	9%	6%	5%
Safety Reputation	8%	19%	21%
Airline Loyalty	4%	6%	6%
In-flight Service	4%	1%	1%
Employer policy	3%	2%	2%
Other	6%	9%	10%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	84%	90%	91%
Executive/Business	15%	8%	8%
First Class	2%	2%	1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	17%	20%
No	86%	83%	80%
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	2%	2%
8 - 30 days	27%	7%	7%
31 - 60 days	15%	9%	9%
61 - 90 days	10%	10%	10%
91 - 120 days	11%	12%	12%
121 - 180 days	20%	46%	46%
6 Months or More	14%	14%	14%
Total	100%	100%	100%

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**Characteristics of Travelers from Australia to California  
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Australia (n = 416)	Leisure Visitors from Australia (n = 349)
<b>Travel Companions**</b>			
Traveling Alone	39%	24%	21%
Spouse	27%	43%	49%
Family/Relatives	25%	39%	38%
Friends	11%	8%	9%
Business Associates	8%	2%	1%
Tour Group	2%	1%	1%
<b>Average Travel Party Size</b>	1.6	1.8	1.9
<b>Median Travel Party Size</b>	1.0	2.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	78%	86%	85%
Private Home	29%	27%	28%
Other	4%	3%	3%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.8 nights	28.2 nights	26.8 nights
Mean Nights in California	11.3 nights	9.1 nights	7.6 nights
% of California Nights	50%	32%	28%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	38%	41%
Average Trips to the U.S. in Past Year	1.8 trips	1.2 trips	1.2 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	2.2 trips	2.0 trips
<b>Average Number of States Visited</b>	2.1 states	3.0 states	2.9 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	3.9 dest.	4.0 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	72%	72%
San Francisco	47%	45%	49%
Las Vegas	29%	34%	39%
New York City	16%	37%	41%
San Diego	14%	14%	8%
Flagstaff	8%	5%	6%
Anaheim-Santa Ana	7%	12%	14%
Grand Canyon	5%	5%	6%
San Jose	5%	1%	1%
DC Metro Area	5%	15%	11%
Yosemite	4%	3%	3%
Chicago	4%	6%	6%
Monterey-Salinas	4%	10%	12%
Miami	4%	10%	5%
Riverside/San Bernardino	4%	3%	4%
Seattle	3%	9%	4%
Sacramento	3%	3%	3%

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**Characteristics of Travelers from Australia to California  
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Australia (n = 416)	Leisure Visitors from Australia (n = 349)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	95%	96%
Dining Out	85%	91%	91%
Sightseeing in Cities	57%	79%	81%
Historical Places	47%	73%	73%
Amusement/Theme Parks	40%	53%	59%
National Parks	38%	48%	49%
Visiting Small Towns	38%	45%	43%
Cultural Heritage Sites	31%	48%	47%
Touring Countryside	31%	47%	53%
Art Gallery/Museum	26%	48%	48%
Casinos/Gambling	25%	29%	34%
Guided Tours	23%	48%	55%
<b>Transportation While in the U.S.**</b>			
Rented Auto	41%	46%	44%
Taxi/Limousine	39%	53%	56%
Airlines in U.S.	37%	53%	55%
Company or Private Auto	28%	21%	22%
City Subway/Tram/Bus	25%	31%	34%
Railroad between Cities	12%	12%	13%
Bus between Cities	10%	18%	20%
Motor Home/Camper	2%	1%	-
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,797	\$6,730	\$6,730
Per Visitor/Trip (U.S.)	\$2,435	\$3,640	\$3,522
Per Visitor Per Day	\$107	\$129	\$131
Per Visitor/Trip (California)	\$1,209	\$1,174	\$996
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$661	\$1,015	\$809
Food/Beverages	\$514	\$853	\$804
Gifts/Souvenirs	\$421	\$547	\$654
Transportation in the U.S.	\$384	\$622	\$596
Entertainment	\$243	\$499	\$553
Expenses at the Airport	\$34	\$29	\$31
Other	\$179	\$77	\$76
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,435</b>	<b>\$3,640</b>	<b>\$3,522</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	52%	46%	42%
Cash	39%	34%	35%
Debit Cards	7%	20%	22%
Travelers Checks	1%	1%	1%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	43 years	42 years	41 years
Average Age - Females	40 years	42 years	42 years
<b>Occupation</b>			
Professional/Technical	33%	42%	40%
Manager/Executive	29%	17%	14%
Student	10%	5%	5%
Retired	9%	12%	14%
Clerical/Sales	8%	11%	12%
Other	12%	13%	15%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	8%	2%	1%
\$20,000 - \$39,999	13%	7%	8%
\$40,000 - \$59,999	14%	14%	17%
\$60,000 - \$79,999	13%	14%	16%
\$80,000 - \$99,999	11%	12%	12%
\$100,000 - \$119,999	11%	18%	12%
\$120,000 - \$139,999	7%	6%	5%
\$140,000 - \$159,999	6%	9%	10%
\$160,000 - \$179,999	3%	5%	5%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	13%	12%	13%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$107,300	\$104,900

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