

CHARACTERISTICS OF TRAVELERS FROM INDIA TO CALIFORNIA – 2009

India was one of California's large overseas markets with approximately 157,000 visitors to California in 2009. Collectively visitors from India spent approximately \$259 million in California.

Indian visitors to California during 2009 reported spending \$70 per day during a 23.6 night average stay or approximately \$1,652 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

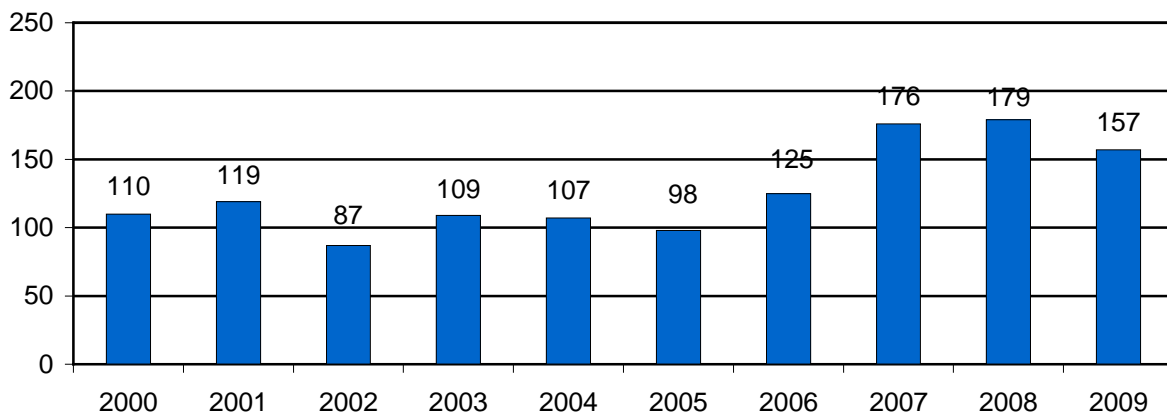
Visitors From India

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	210,975	42.2%	89,000
1999	228,072	38.1%	87,000
2000	274,202	40.2%	110,000
2001	269,674	44.0%	119,000
2002	257,271	34.0%	87,000
2003	272,161	40.0%	109,000
2004	308,845	34.7%	107,000
2005	344,926	28.4%	98,000
2006	406,845	30.7%	125,000
2007	567,045	31.0%	176,000
2008	598,971	29.9%	179,000
2009	549,474	28.6%	157,000

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 India to CA, 2000-2009 (in 000s)



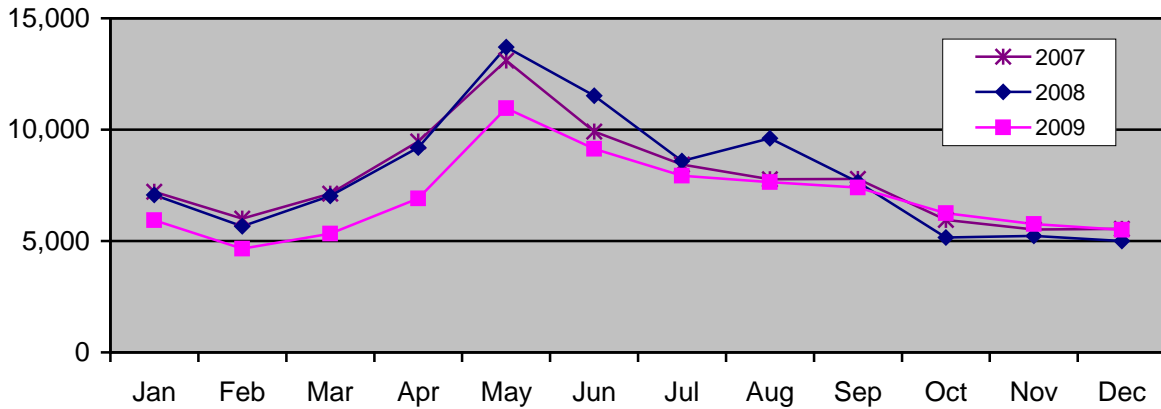
Source: International Trade Administration, Office of Travel and Tourism Industries.

Since the middle of the 1990s India has grown dramatically as a source of visitors to California from just 41,000 to a peak of 179,000 visitors in 2008. Visitation to California from India dipped in 2009 to 157,000 down from the previous year's high.

Indian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from India to California were very similar in 2009 compared with 2007 and 2008. There was, however, a decrease in passenger arrivals from India during the early months of 2009. In all years, Indian resident arrivals at California ports-of-entry peaked in May. The lowest volumes were recorded in February, November, and December.

**Residents of India
Monthly Port of Entry Arrivals to CA
2007-2009**



U.S. Department of Homeland Security, I-94 Form; 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 purposes
- Use a corporate travel department for trip planning
- Use a travel agent or a corporate travel department for booking an air trip
- Have shorter trip planning and advance airline booking horizons
- Mention airline schedule as the main reason for selecting an airline
- Travel alone
- Stay in a private home
- Visit the U.S. and California for a lengthy stay
- Be on their first trip to the U.S.
- Visit San Jose
- Have a higher total spending per visitor per trip
- Work in a professional/technical position
- Have a lower average annual household income

Conversely, visitors from India are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Use a personal computer to plan and book their trip
- Travel with family or relatives
- Stay in a hotel or other paid lodging
- Visit Los Angeles or Las Vegas
- Visit small towns, national parks, or cultural heritage sites

Characteristics of Travelers from India to California – 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from India (n = 389)	Leisure Visitors from India (n = 152)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	14%	33%
Business/Professional	22%	43%	-
Visit Friends/Relatives	21%	30%	67%
Convention/Conference	6%	6%	-
Other Purpose	5%	6%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	34%	53%
Visit Friends/Relatives	37%	49%	82%
Business/Professional	26%	46%	2%
Convention/Conference	8%	12%	-
Sources Used to Plan Trip**			
Airlines Directly	23%	15%	14%
Corporate Travel Department	8%	25%	2%
Personal Computer	43%	22%	24%
Friends/Relatives	18%	20%	30%
Newspapers/Magazines	3%	1%	1%
State/City Travel Office	4%	4%	2%
Tour Company	7%	2%	3%
Travel Agency	40%	42%	43%
Travel Guides	10%	3%	4%
Advance Planning for Trip			
7 days or less	7%	14%	5%
8 - 30 days	28%	41%	32%
31 - 60 days	19%	22%	33%
61 - 90 days	12%	8%	9%
More than 3 Months	34%	15%	20%
Total	100%	100%	100%
Average Planning Time in Days	100 days	55 days	67 days
Advance Airline Reservations			
7 days or less	13%	23%	10%
8 - 30 days	38%	54%	54%
31 - 60 days	16%	15%	22%
61 - 90 days	10%	3%	6%
91 - 120 days	6%	1%	1%
121 - 180 days	10%	3%	7%
6 Months or More	7%	-	-
Total	100%	100%	100%
Average Booking in Days	67 days	31 days	43 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 India to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from India (n = 389)	Leisure Visitors from India (n = 152)
Means of Booking Air Trip			
Airlines Directly	13%	8%	13%
Corporate Travel Department	9%	25%	4%
Personal Computer	25%	7%	13%
Travel Agent	46%	58%	68%
Travel Club	1%	-	-
Tour Operator	5%	1%	1%
Other/Don't Know	2%	1%	1%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	26%	32%
Schedule	13%	25%	32%
Non-Stop Flight	12%	4%	7%
Mileage Bonus/Frequent Flyer Program	10%	6%	3%
Previous Good Experience	9%	12%	11%
Safety Reputation	6%	4%	7%
Airline Loyalty	4%	1%	3%
In-flight Service	5%	5%	1%
Employer policy	3%	8%	-
Other	6%	9%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	89%	91%
Executive/Business	17%	11%	9%
First Class	2%	-	-
Total	100%	100%	100%
Use of Package			
Yes	14%	5%	8%
No	86%	95%	92%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	17%	1%
8 - 30 days	24%	51%	51%
31 - 60 days	13%	10%	15%
61 - 90 days	13%	8%	12%
91 - 120 days	8%	-	-
121 - 180 days	18%	14%	22%
6 Months or More	20%	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from India to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from India (n = 389)	Leisure Visitors from India (n = 152)
Travel Companions**			
Business Associates	8%	4%	-
Family/Relatives	25%	16%	31%
Friends	11%	4%	2%
Spouse	28%	22%	35%
Tour Group	2%	-	-
Traveling Alone	38%	61%	42%
Average Travel Party Size	1.6	1.3	1.5
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	62%	51%
Private Home	30%	52%	66%
Other	4%	1%	2%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	42.7 nights	46.5 nights
Mean Nights in California	11.7 nights	23.6 nights	25.0 nights
% of California Nights	52%	55%	54%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	39%	41%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.2 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	3.7 trips	2.5 trips
Average Number of States Visited	2.1 states	2.1 states	1.8 states
Average Number of Destinations Visited	3.0 dest.	2.7 dest.	2.5 dest.
Places Visited in the U.S.**			
Los Angeles	55%	41%	55%
San Francisco	48%	48%	46%
Las Vegas	30%	17%	24%
New York City	18%	18%	29%
San Diego	13%	10%	10%
Anaheim-Santa Ana	7%	5%	6%
Grand Canyon	7%	1%	1%
San Jose	6%	15%	16%
Yosemite	4%	1%	1%
Chicago	4%	6%	7%
DC Metro Area	4%	8%	10%
Monterey-Salinas	4%	2%	2%
Riverside/San Bernardino	4%	1%	1%
Seattle	3%	2%	2%
Sacramento	3%	4%	1%
Santa Barbara	3%	-	-
Oakland	2%	5%	5%

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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from India (n = 389)	Leisure Visitors from India (n = 152)
Activities Experienced While in the U.S.**			
Shopping	87%	86%	84%
Dining Out	86%	78%	77%
Sightseeing in Cities	56%	53%	69%
Historical Places	45%	42%	59%
National Parks	39%	24%	28%
Amusement/Theme Parks	39%	43%	59%
Visiting Small Towns	38%	20%	26%
Cultural Heritage Sites	32%	19%	24%
Touring Countryside	31%	25%	35%
Casinos/Gambling	27%	25%	33%
Art Gallery/Museum	26%	18%	26%
Guided Tours	24%	16%	15%
Transportation While in the U.S.**			
Airlines in U.S.	39%	39%	43%
Taxi/Limousine	39%	46%	32%
Rented Auto	38%	29%	25%
Company or Private Auto	29%	21%	22%
City Subway/Tram/Bus	26%	21%	22%
Railroad between Cities	11%	18%	21%
Bus between Cities	10%	14%	22%
Motor Home/Camper	2%	6%	8%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$3,841	\$2,968
Per Visitor/Trip (U.S.)	\$2,308	\$2,976	\$1,938
Per Visitor Per Day	\$103	\$70	\$42
Per Visitor/Trip (California)	\$1,205	\$1,652	\$1,050
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$1,079	\$318
Food/Beverages	\$463	\$527	\$340
Gifts/Souvenirs	\$395	\$506	\$691
Transportation in the U.S.	\$348	\$510	\$320
Entertainment	\$234	\$163	\$172
Expenses at the Airport	\$34	\$24	\$16
Other	\$174	\$167	\$81
Total Spending Per Visitor/Trip	\$2,308	\$2,976	\$1,938

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Payment Method for Trip Expenses			
Credit Cards	50%	43%	32%
Cash	41%	39%	56%
Debit Cards	7%	11%	5%
Travelers Checks	2%	8%	8%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	40 years	49 years
Average Age - Females	39 years	36 years	39 years
Occupation			
Professional/Technical	35%	45%	38%
Manager/Executive	28%	35%	23%
Student	10%	7%	9%
Retired	8%	6%	14%
Clerical/Sales	7%	-	1%
Other	13%	6%	15%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	26%	37%
\$20,000 - \$39,999	14%	19%	13%
\$40,000 - \$59,999	14%	14%	13%
\$60,000 - \$79,999	13%	11%	5%
\$80,000 - \$99,999	11%	7%	8%
\$100,000 - \$119,999	9%	6%	6%
\$120,000 - \$139,999	6%	3%	3%
\$140,000 - \$159,999	5%	3%	1%
\$160,000 - \$179,999	3%	2%	5%
\$180,000 - \$199,999	3%	-	1%
\$200,000 and over	12%	8%	9%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$65,500	\$65,400

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