

CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA – 2014

In 2014, Australia was California’s third largest overseas market to California with approximately 589,000 visitors to California. It was surpassed by the U.K with 686,000 visitors and by China with 996,000. Collectively visitors from Australia spent approximately \$914 million in California.

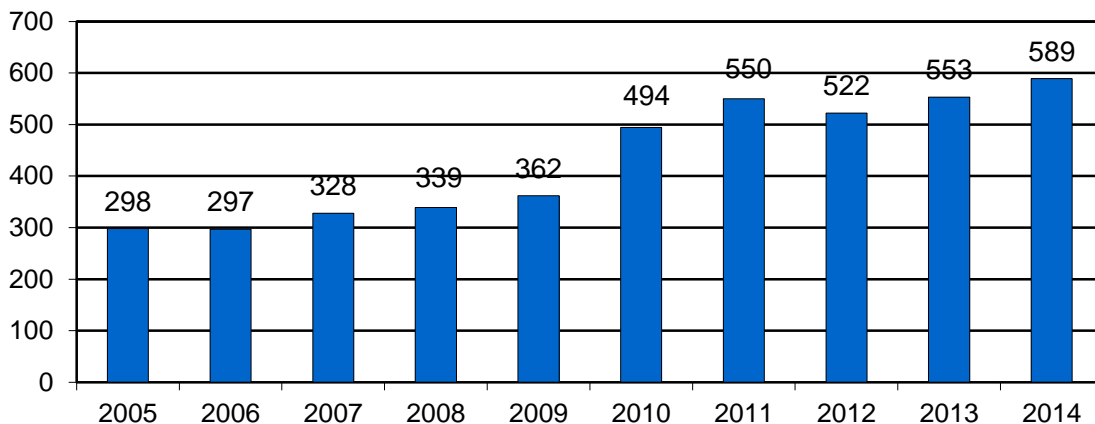
Australian visitors to California during 2014 reported spending \$173 per day during a 9.0 night average stay or approximately \$1,553 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

Visitors from Australia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2004	519,955	49.2%	256,000
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	1,276,124	46.1%	589,000

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

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



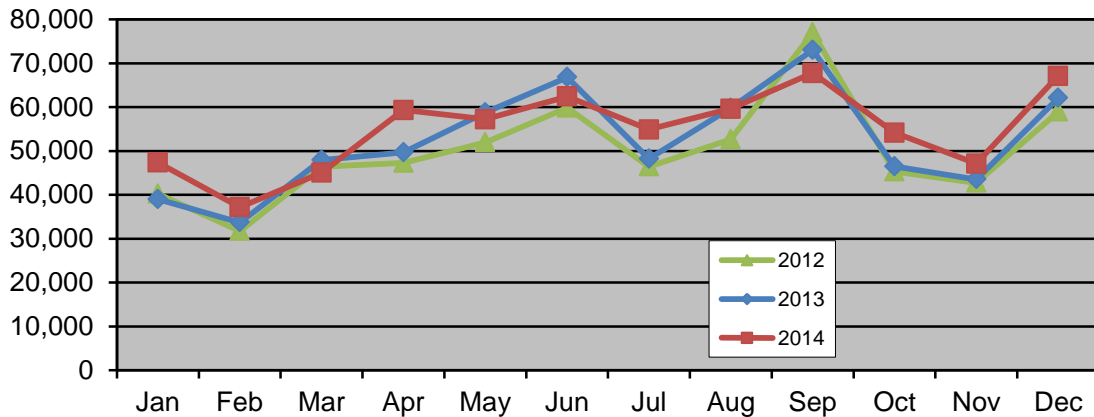
Source: U.S. Dept. of Commerce, National Travel and Tourism Office, Survey of International Air Travelers. Revised by Tourism Economics for Visit California (October, 2015).

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 589,000 visitors in 2014 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 similar in 2014 as in 2012 and 2013. 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
2012-2014**



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 as a trip planning source and means of booking air trip
- Have a decidedly longer trip planning and advance airline booking horizon
- Choose an airline based on airfare as a main factor
- Travel with their spouse/partner
- 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 most of the listed leisure activities
- Make use of air travel between U.S cities, taxicabs/limousines, a ferry/river taxi/short scenic cruise 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 or cash advance/withdrawal using a debit card
- Have a higher average annual income

Conversely, visitors from Australia are less likely to:

- Travel to California for business/professional purposes
- Make use of a corporate travel department as a trip planning source or as a means of booking their air trip
- Book their air trip with an internet booking service
- Choose an airline based on non-stop flights as a main factor
- Be traveling alone to the U.S.
- 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, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Australia (n = 623)	Leisure Visitors from Australia (n = 519)
Primary Purpose of Trip			
Vacation/Holidays	54%	79%	88%
Visit Friends/Relatives	18%	11%	12%
Business	13%	5%	-
Convention/Conference	8%	4%	-
Other Purpose	7%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	88%	95%
Visit Friends/Relatives	34%	29%	28%
Business	18%	9%	3%
Convention/Conference	12%	7%	2%
Sources Used to Plan Trip**			
Airline	43%	38%	39%
Online Travel Agency	32%	40%	40%
Travel Agency Office	25%	50%	52%
Personal Recommendation	29%	34%	33%
Travel Guide	15%	18%	17%
Corporate Travel Department	12%	6%	4%
Tour Operator/Travel Club	10%	10%	11%
National/State/City Travel Office	8%	6%	7%
Advance Planning for Trip			
7 days or less	5%	2%	1%
8 - 30 days	25%	9%	6%
31 - 60 days	19%	10%	10%
61 - 90 days	15%	15%	15%
More than 3 Months	36%	64%	68%
Total	100%	100%	100%
Average Planning Time in Days	106 days	177 days	131 days
Advance Airline Reservations			
7 days or less	9%	3%	2%
8 - 30 days	35%	17%	14%
31 - 60 days	19%	16%	14%
61 - 90 days	12%	15%	14%
91 - 120 days	8%	9%	9%
121 - 180 days	10%	17%	18%
6 Months or More	8%	24%	28%
Total	100%	100%	100%
Average Booking in Days	74 days	125 days	136 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Australia (n = 623)	Leisure Visitors from Australia (n = 519)
Means of Booking Air Trip**			
Travel Agency Office	29%	56%	58%
Airlines Directly	29%	26%	27%
Internet Booking Service	27%	19%	18%
Corporate Travel Department	12%	5%	1%
Tour Operator/Travel Club	10%	6%	5%
Other	1%	1%	<1%
Main Factor in Selecting Airline			
Airfare	31%	44%	45%
Non-Stop Flights	19%	8%	9%
Convenient Schedule	14%	14%	13%
Previous Good Experience	8%	10%	10%
Mileage Bonus/Frequent Flyer Program	6%	5%	4%
Safety Reputation	6%	5%	6%
Loyalty to Carrier	3%	3%	3%
In-flight Service Reputation	3%	2%	2%
Employer policy	2%	2%	1%
On-time Reputation	2%	1%	1%
Other	5%	6%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	89%	90%
Premium Economy	9%	9%	8%
Executive/Business	8%	2%	2%
First Class	1%	<1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	13%	13%
No	85%	87%	87%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	7%	7%
Bus/Coach	6%	7%	7%
Guided Tours	6%	6%	6%
Meals	6%	6%	6%
Rental Car	5%	2%	1%
Tour Guide for Entire Trip	4%	2%	2%
Airfare and Accommodation Only	2%	2%	2%
Cruise	2%	3%	3%
Recreation	2%	2%	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 Australia to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Australia (n = 623)	Leisure Visitors from Australia (n = 519)
Travel Companions**			
Traveling Alone	59%	47%	38%
Spouse/Partner	22%	34%	40%
Family/Relatives	15%	20%	24%
Friends	6%	7%	8%
Business Associates	3%	<1%	-
Tour Group	1%	<1%	<1%
Average Travel Party Size	1.7	1.8	2.0
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	82%	82%
Private Home	30%	19%	19%
Other	6%	8%	8%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	23.5 nights	22.1 nights
Mean Nights in California	12.2 nights	9.0 nights	8.8 nights
% of California Nights	52%	38%	40%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	36%	38%
Average Trips to the U.S. in Past Year	1.7 trips	1.3 trips	1.2 trips
Average Number of States Visited	2.1 states	2.8 states	2.8 states
Average Number of Destinations Visited	3.1 dest.	3.9 dest.	4.0 dest.
Places Visited in the U.S.**			
Los Angeles	62%	72%	74%
San Francisco	44%	43%	42%
Las Vegas	29%	46%	50%
New York City	16%	35%	36%
San Diego	14%	14%	15%
Anaheim-Santa Ana	8%	21%	23%
Flagstaff-Grand Canyon-Sedona	7%	4%	5%
San Jose	6%	2%	1%
Monterey-Salinas	5%	2%	2%
DC Metro Area	4%	8%	9%
Riverside/San Bernardino	4%	4%	3%
Santa Barbara	4%	2%	2%
Chicago	3%	4%	3%
Oahu	3%	9%	11%
Seattle	3%	4%	3%
Sacramento	3%	2%	3%
Miami	3%	6%	6%

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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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Australia (n = 623)	Leisure Visitors from Australia (n = 519)
Activities Experienced While in the U.S.**			
Shopping	89%	97%	97%
Sightseeing	83%	91%	94%
National Parks/Monuments	52%	63%	66%
Small Towns/Countryside	44%	47%	48%
Experience Fine Dining	43%	48%	49%
Amusement/Theme Parks	40%	58%	62%
Historical Locations	35%	50%	52%
Guided Tours	33%	63%	68%
Art Gallery/Museums	31%	46%	47%
Casino/Gamble	24%	41%	45%
Concert/Play/Musical	21%	42%	45%
Cultural/Ethnic Heritage Sites	20%	29%	32%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	71%	73%
Rented Auto	44%	39%	41%
Auto, Private or Company	38%	42%	41%
City Subway/Tram/Bus	31%	48%	49%
Taxicab/Limousine	31%	53%	55%
Bus between Cities	19%	26%	26%
Ferry/River Taxi/Srt. Scenic Cruise	10%	23%	23%
Railroad between Cities	7%	11%	11%
Rented Bicycle/Motorcycle/Moped	5%	8%	7%
Cruise Ship/River Boat 1+ Nights	4%	8%	9%
Motor Home/Camper	2%	2%	3%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$4,054	\$4,208
Per Visitor Per Day (CA)	\$153	\$173	\$190
Per Visitor/Trip (California)	\$1,872	\$1,553	\$1,676
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	27.2%	26.4%
Air Transportation in the U.S.	6.6%	8.1%	8.4%
Entertainment	12.5%	16.0%	16.5%
Food/Beverages	18.1%	18.6%	18.3%
Gifts/Souvenirs	21.1%	19.7%	20.1%
Ground Transportation in the U.S.	6.2%	4.9%	4.6%
Other	4.9%	5.2%	5.7%

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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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Australia (n = 623)	Leisure Visitors from Australia (n = 519)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	34%	32%
Cash from Home/Travelers Checks	27%	19%	19%
Cash Adv./Withdrawal Using Credit Card	18%	16%	16%
Cash Adv./Withdrawal Using Debit Card	6%	16%	17%
Purchases Using Debit Card	6%	16%	17%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	39 years	39 years
Average Age - Females	38 years	39 years	40 years
Occupation			
Mgmt., Business, Science & Arts	44%	42%	43%
Service Occupations	11%	10%	10%
Student	11%	8%	7%
Sales and Office	11%	13%	12%
Retired	8%	9%	8%
Homemaker	4%	5%	6%
Prod., Trans., & Material Moving	4%	3%	4%
Nat. Res., Const., & Maintenance	3%	6%	6%
Military/Government	2%	3%	3%
Other	2%	1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	6%	5%
\$20,000 - \$39,999	13%	7%	7%
\$40,000 - \$59,999	14%	13%	12%
\$60,000 - \$79,999	11%	9%	9%
\$80,000 - \$99,999	10%	14%	15%
\$100,000 - \$119,999	9%	11%	12%
\$120,000 - \$139,999	6%	10%	11%
\$140,000 - \$159,999	4%	7%	7%
\$160,000 - \$179,999	3%	5%	5%
\$180,000 - \$199,999	2%	9%	10%
\$200,000 and over	11%	10%	9%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$116,408	\$114,970

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