

## CHARACTERISTICS OF TRAVELERS FROM INDIA TO CALIFORNIA – 2013

India was one of California’s large overseas markets with approximately 240,000 visitors to California in 2013. Collectively visitors from India spent approximately \$446 million in California.

Indian visitors to California during 2013 reported spending \$90 per day during a 20.7 night average stay or approximately \$1,859 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

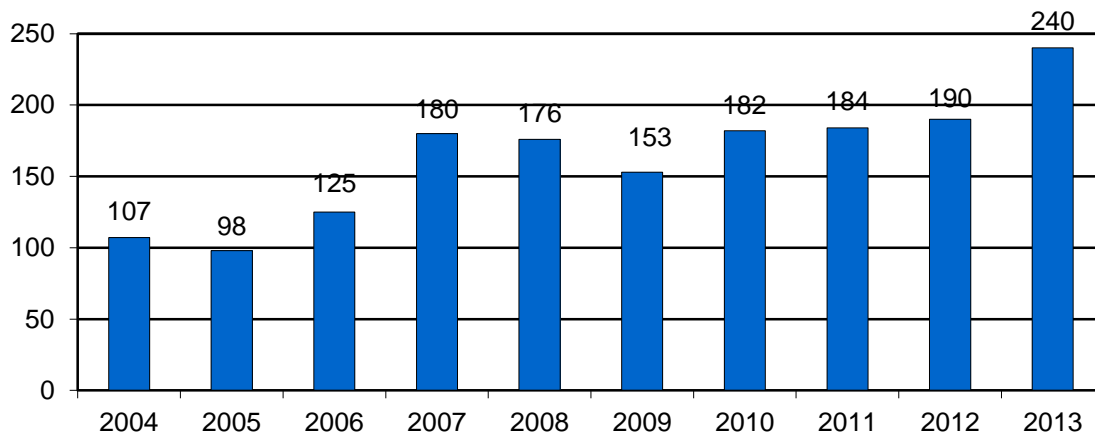
### Visitors From India

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2003	272,161	40.0%	109,000
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

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, 2004-2013 (in 000s)

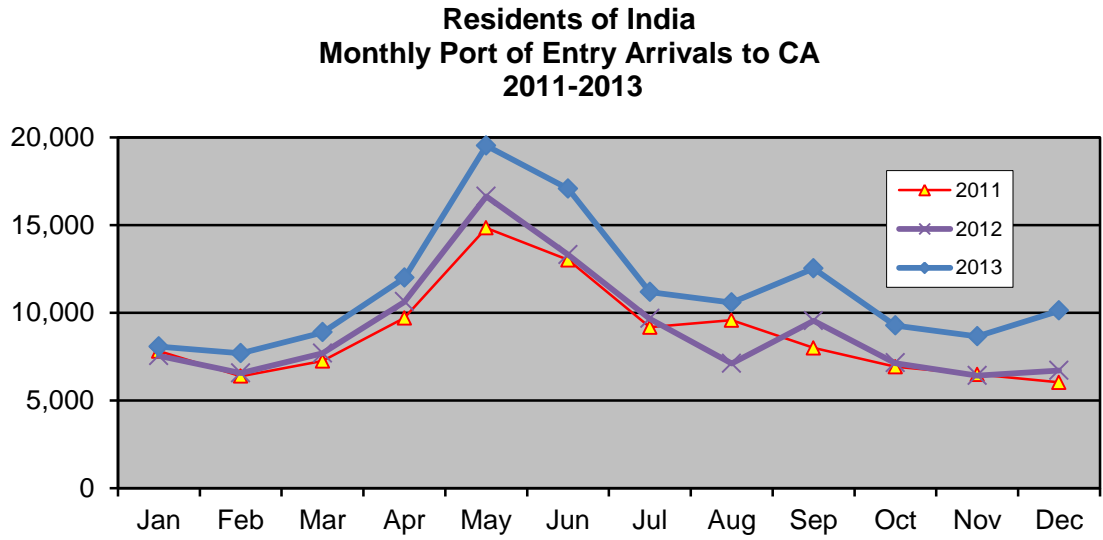


Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

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 240,000 visitors in 2013.

### Indian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from India to California were higher in 2013 compared with 2012 and 2011. In all years, Indian resident arrivals at California ports-of-entry peaked in May. The lowest volumes were recorded in January, February and November.



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 and to be visiting friends/relatives
- Use a corporate travel department for trip planning and booking an air trip
- Have shorter trip planning and advance airline booking horizons
- Select an airline due to a convenient schedule
- Sit in economy/tourist/coach class
- Travel alone
- Stay in a private home
- Stay longer in the U.S. and California
- Visit San Jose
- Use a taxicab/limousine or railroad between cities for transportation while in the US
- Spend while in the U.S., including a greater proportion of their travel dollar on accommodation\*
- Work in a management/business/science/arts or a service 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 a travel guide
- Book their air travel with the airlines directly
- Mention non-stop flights as the main factor in selecting an airline
- Travel with a spouse/partner
- Stay in a hotel or other paid lodging
- Visit Los Angeles or Las Vegas
- Use a rented auto, city subway/tram/bus or a company or private auto for transportation while in the US
- 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

\*Caution- Small Sample Size

## Characteristics of Travelers from India to California – 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from India (n = 193)	Leisure Visitors from India (n = 83)***
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	52%	13%	30%
Visit Friends/Relatives	17%	30%	70%
Business	15%	38%	-
Convention/Conference	9%	13%	-
Other Purpose	8%	6%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	64%	24%	53%
Visit Friends/Relatives	32%	35%	74%
Business	20%	49%	-
Convention/Conference	12%	21%	-
<b>Sources Used to Plan Trip**</b>			
Airline	43%	38%	41%
Online Travel Agency	31%	24%	27%
Travel Agency Office	26%	22%	41%
Personal Recommendation	26%	21%	40%
Travel Guide	15%	4%	8%
Corporate Travel Department	14%	36%	4%
Tour Operator/Travel Club	9%	7%	9%
National/State/City Travel Office	8%	5%	5%
<b>Advance Planning for Trip</b>			
7 days or less	5%	13%	4%
8 - 30 days	27%	45%	18%
31 - 60 days	17%	18%	24%
61 - 90 days	14%	11%	23%
More than 3 Months	36%	14%	31%
Total	100%	100%	100%
Average Planning Time in Days	105 days	52 days	91 days
<b>Advance Airline Reservations</b>			
7 days or less	10%	19%	9%
8 - 30 days	35%	51%	27%
31 - 60 days	17%	10%	14%
61 - 90 days	13%	11%	27%
91 - 120 days	8%	5%	12%
121 - 180 days	9%	3%	9%
6 Months or More	7%	1%	2%
Total	100%	100%	100%
Average Booking in Days	72 days	38 days	70 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%.

\*\*\*Caution – Small sample size

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

**Characteristics of Travelers from India to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from India (n = 193)	Leisure Visitors from India (n = 83)***
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	31%	31%	56%
Airlines Directly	28%	11%	17%
Internet Booking Service	24%	17%	26%
Corporate Travel Department	15%	40%	-
Tour Operator/Travel Club	9%	4%	3%
Other	2%	1%	<1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	29%	38%
Non-Stop Flights	17%	3%	5%
Convenient Schedule	15%	29%	40%
Mileage Bonus/Frequent Flyer Program	9%	7%	2%
Previous Good Experience	9%	9%	8%
Safety Reputation	6%	<1%	-
Loyalty to Carrier	4%	3%	1%
Employer policy	3%	4%	2%
In-flight Service Reputation	3%	6%	2%
On-time Reputation	2%	4%	1%
Other	4%	5%	-
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	79%	91%	94%
Executive/Business	10%	2%	2%
Premium Economy	10%	6%	3%
First Class	1%	<1%	1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	8%	1%
No	85%	92%	99%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	3%	3%	-
Attractions/Events/Entertainment	7%	1%	1%
Bus/Coach	7%	1%	1%
Cruise	2%	-	-
Guided Tours	6%	<1%	1%
Meals	6%	4%	1%
Recreation	1%	-	-
Rental Car	5%	4%	<1%
Tour Guide for Entire Trip	4%	-	-

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\*\* Multiple response question. Travel package must include airfare and accommodation and may include others.

\*\*\*Caution – Small sample size

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

**Characteristics of Travelers from India to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from India (n = 193)	Leisure Visitors from India (n = 83)***
<b>Travel Companions**</b>			
Traveling Alone	61%	81%	56%
Spouse/Partner	21%	11%	29%
Family/Relatives	13%	8%	20%
Friends	6%	1%	<1%
Business Associates	4%	2%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.6	1.2	1.6
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	66%	41%
Private Home	27%	39%	69%
Other	6%	4%	8%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.5 nights	38.3 nights	45.8 nights
Mean Nights in California	12.2 nights	20.7 nights	19.5 nights
% of California Nights	54%	54%	43%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	27%	37%
Average Trips to the U.S. in Past Year	1.7 trips	1.5 trips	1.2 trips
<b>Average Number of States Visited</b>	2.0 states	1.9 states	2.5 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	2.5 dest.	3.3 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	59%	36%	50%
San Francisco	47%	42%	38%
Las Vegas	30%	16%	29%
New York City	16%	14%	16%
San Diego	13%	10%	15%
Anaheim-Santa Ana	8%	6%	8%
Flagstaff-Grand Canyon-Sedona	7%	3%	7%
San Jose	6%	27%	23%
DC Metro Area	4%	5%	10%
Monterey-Salinas	4%	-	-
Oahu	4%	<1%	-
Santa Barbara	3%	1%	1%
Riverside/San Bernardino	3%	1%	3%
Chicago	3%	7%	11%
Seattle	3%	3%	1%
Sacramento	3%	4%	7%
Miami	3%	1%	2%

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**Characteristics of Travelers from India to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from India (n = 193)	Leisure Visitors from India (n = 83)***
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	88%	90%
Sightseeing	84%	81%	94%
National Parks/Monuments	49%	26%	50%
Experience Fine Dining	43%	33%	49%
Small Towns/Countryside	41%	28%	46%
Amusement/Theme Parks	38%	31%	45%
Historical Locations	37%	19%	28%
Guided Tours	33%	19%	29%
Art Gallery/Museums	30%	23%	47%
Casino/Gamble	25%	11%	11%
Cultural/Ethnic Heritage Sites	21%	9%	19%
Concert/Play/Musical	20%	10%	21%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	46%	50%	59%
Rented Auto	43%	22%	15%
Auto, Private or Company	37%	27%	45%
City Subway/Tram/Bus	33%	22%	24%
Taxicab/Limousine	33%	50%	30%
Bus between Cities	18%	25%	34%
Ferry/River Taxi/Srt. Scenic Cruise	12%	9%	14%
Railroad between Cities	8%	15%	22%
Rented Bicycle/Motorcycle/Moped	5%	2%	3%
Cruise Ship/River Boat 1+ Nights	4%	2%	3%
Motor Home/Camper	2%	4%	11%
<b>Visitor Spending****</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$3,440	\$2,301
Per Visitor Per Day (CA)	\$159	\$90	\$50
Per Visitor/Trip (California)	\$1,940	\$1,859	\$980
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	29.1%	44.7%	9.0%
Air Transportation in the U.S.	6.9%	7.0%	8.1%
Entertainment	12.2%	8.7%	18.1%
Food/Beverages	17.8%	13.9%	14.6%
Gifts/Souvenirs	21.9%	12.8%	30.0%
Ground Transportation in the U.S.	5.6%	10.1%	16.8%
Other	6.3%	2.7%	3.5%

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\*\*\*\* 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  
(2013 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	41%	37%
Cash from Home/Travelers Checks	26%	23%	38%
Cash Adv./Withdrawal Using Credit Card	18%	15%	18%
Cash Adv./Withdrawal Using Debit Card	7%	15%	1%
Purchases Using Debit Card	6%	6%	6%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	42 years	40 years	55 years
Average Age - Females	39 years	34 years	36 years
<b>Occupation</b>			
Mgmt., Business, Science, & Arts	44%	56%	43%
Service Occupations	11%	24%	22%
Student	11%	3%	4%
Sales and Office	10%	4%	-
Retired	8%	7%	20%
Homemaker	5%	3%	7%
Prod., Trans., & Material Moving	4%	2%	-
Military/Government	4%	1%	2%
Nat. Res., Const., & Maintenance	3%	-	-
Other	2%	1%	1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	40%	55%
\$20,000 - \$39,999	14%	22%	20%
\$40,000 - \$59,999	14%	14%	3%
\$60,000 - \$79,999	12%	6%	-
\$80,000 - \$99,999	10%	5%	6%
\$100,000 - \$119,999	8%	1%	3%
\$120,000 - \$139,999	6%	2%	-
\$140,000 - \$159,999	5%	2%	-
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	2%	-
\$200,000 and over	12%	6%	13%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$53,546	\$52,197

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