

CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA - 2008

Australia was California's fourth largest overseas market with approximately 341,000 visitors to California in 2008. Collectively visitors from Australia spent approximately \$390 million in California.

Australian visitors to California during 2008 reported spending \$130 per day during an 8.8 night average stay or approximately \$1,144 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

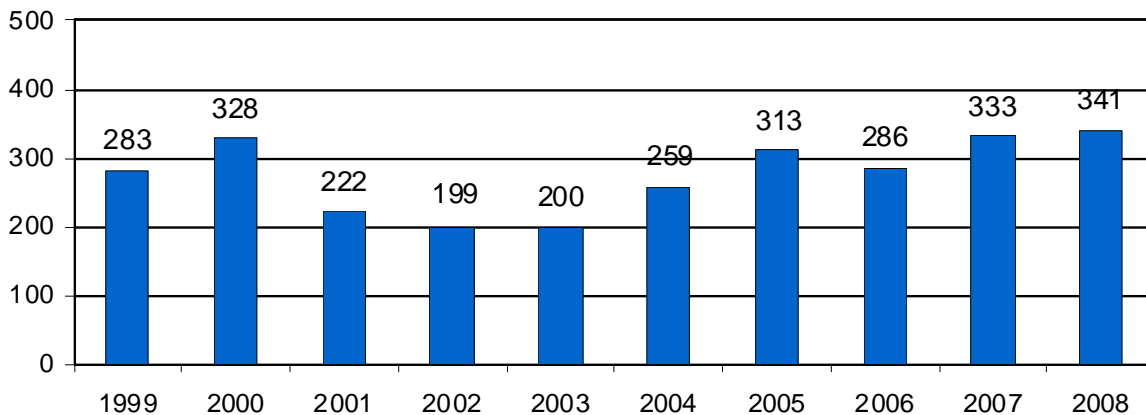
Visitors From Australia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	460,705	58.5%	270,000
1999	483,157	58.6%	283,000
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

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, 1999-2008 (in 000s)



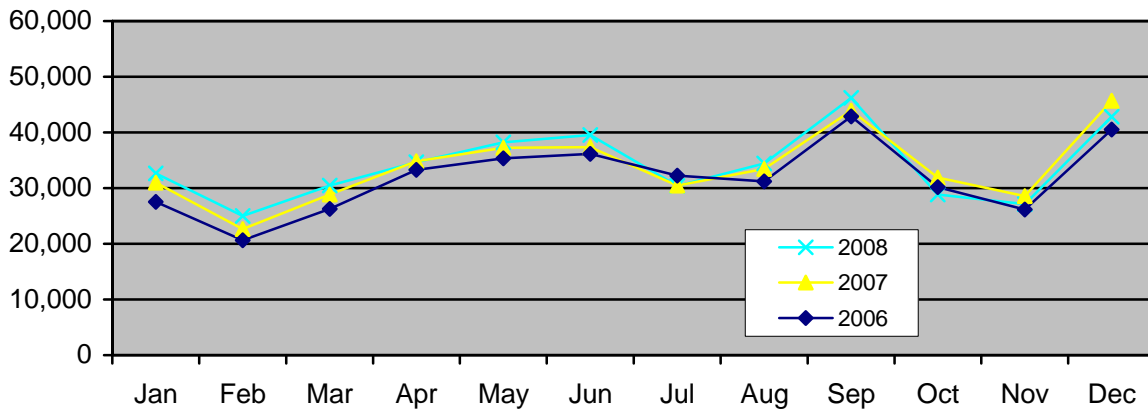
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 341,000 visitors in 2008.

Australian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Australia to California were generally consistent in 2008 compared with 2006 and 2007. 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
2006-2008**



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
- Mention airfare as a main factor in selecting an airline
- Travel with a spouse
- Be on their first trip to the U.S.
- Visit Los Angeles, Las Vegas, and New York City while in the U.S.
- Experience leisure-oriented activities
- Make use of a taxi/limousine, airlines in the U. S., city subway/tram/bus, as well as buses between cities as means of transportation while in the U.S.

Conversely, visitors from Australia are less likely to:

- Travel to California for business purposes
- Make use of a corporate travel department and a personal computer as a trip planning source or to book air travel

**Characteristics of Travelers from
Australia to California, 2008**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Australia (n = 551)	Leisure Visitors from Australia (n = 412)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	61%	70%
Visit Friends/Relatives	19	21	30
Business/Professional	27	11	-
Convention/Conference	7	4	-
Other Purpose	5	2	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	77%	85%
Visit Friends/Relatives	37	43	48
Business/Professional	31	17	3
Convention/Conference	11	7	1
Sources Used to Plan Trip**			
Airlines Directly	21%	14%	14%
Corporate Travel Department	11	3	1
Personal Computer	42	46	49
Friends/Relatives	16	20	21
Newspapers/Magazines	3	4	5
State/City Travel Office	4	4	4
Tour Company	6	4	4
Travel Agency	43	64	63
Travel Guides	10	10	10
Advance Planning for Trip			
7 days or less	9%	4%	3%
8 - 30 days	30	15	11
31 - 60 days	19	14	14
61 - 90 days	13	13	12
More than 3 Months	30	53	60
Total	100%	100%	100%
Average Planning Time in Days	92	151	169
Advance Airline Reservations			
7 days or less	16%	8%	6%
8 - 30 days	38	21	17
31 - 60 days	17	17	17
61 - 90 days	10	17	16
91 - 120 days	5	9	10
121 - 180 days	8	16	19
6 Months or More	6	12	15
Total	100%	100%	100%
Average Booking in Days	60	95	108

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Australia (n = 551)	Leisure Visitors from Australia (n = 412)
Means of Booking Air Trip			
Airlines Directly	12%	12%	14%
Corporate Travel Department	11	2	1
Personal Computer	22	12	12
Travel Agent	48	71	70
Travel Club	1	1	1
Tour Operator	4	2	2
Other/Don't Know	3	1	1
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	37%	39%
Schedule	15	12	10
Non-Stop Flight	13	4	3
Mileage Bonus/Frequent Flyer Program	12	16	17
Previous Good Experience	10	10	9
Safety Reputation	7	9	11
Airline Loyalty	4	3	4
In-flight Service	5	1	1
Employer policy	4	1	1
Other	6	5	6
Airline Seating Area			
Economy/Tourist/Coach	77%	82%	86%
Executive/Business	20	15	11
First Class	3	3	3
Total	100%	100%	100%
Use of Package			
Yes	11%	16%	18%
No	89	85	82
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	26	9%	8%
31 - 60 days	23	12	13
61 - 90 days	12	19	15
91 - 120 days	5	7	8
121 - 180 days	17	19	21
6 Months or More	14	34	36
Total	100%	100%	100%

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**Characteristics of Travelers from Australia to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Australia (n = 551)	Leisure Visitors from Australia (n = 412)
Travel Companions**			
Business Associates	10%	3%	1%
Family/Relatives	23	24	29
Friends	12	14	16
Spouse	27	37	42
Tour Group	2	1	1
Traveling Alone	39	33	26
Average Travel Party Size	1.5	1.6	1.7
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	83%	82%
Private Home	28	23	24
Other	4	2	2
Length of Stay			
Mean Nights in the U.S.	21.2	21.7	21.4
Mean Nights in California	11.0	8.8	8.6
% of California Nights	52%	41%	40%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	42%	49%
Average Trips to the U.S. in Past Year	2.0	1.4	1.2
Average Trips to the U.S. in Past 5 Years	6.3	3.1	2.3
Average Number of States Visited	2.0	2.7	2.7
Average Number of Destinations Visited	2.9	3.5	3.6
Places Visited in the U.S.**			
Los Angeles	53%	64%	65%
San Francisco	49	46	45
Las Vegas	28	40	45
New York City	17	40	42
San Diego	13	10	10
San Jose	7	2	2
Anaheim-Santa Ana	7	14	16
Yosemite	5	2	3
Grand Canyon	4	5	6
Chicago	4	5	5
DC Metro Area	4	6	5
Monterey-Salinas	4	3	3
Seattle	3	3	3
Sacramento	3	3	3
Riverside/San Bernardino	3	1	1
Santa Barbara	3	2	2
Oakland	3	1	1

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**Characteristics of Travelers from Australia to California
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Australia (n = 551)	Leisure Visitors from Australia (n = 412)
Activities Experienced While in the U.S.**			
Dining Out	87%	93%	93%
Shopping	85	92	95
Sightseeing in Cities	53	70	75
Historical Places	44	57	60
Visiting Small Towns	36	40	42
National Parks	35	34	36
Amusement/Theme Parks	34	46	53
Touring Countryside	30	42	46
Cultural Heritage Sites	28	32	35
Casinos/Gambling	24	39	43
Art Gallery/Museum	23	37	41
Guided Tours	22	41	46
Transportation While in the U.S.**			
Taxi/Limousine	42%	61%	57%
Airlines in U.S.	40	60	61
Rented Auto	36	35	35
Company or Private Auto	28	20	21
City Subway/Tram/Bus	26	45	47
Railroad between Cities	11	18	18
Bus between Cities	9	17	19
Motor Home/Camper	2	1	2
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$4,540	\$4,634
Per Visitor/Trip (U.S.)	2,607	2,825	2,667
Per Visitor Per Day	123	130	124
Per Visitor/Trip (California)	\$1,353	\$1,144	\$1,066
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$840	\$712
Food/Beverages	526	522	523
Gifts/Souvenirs	450	487	496
Transportation in the U.S.	425	390	364
Entertainment	234	335	372
Expenses at the Airport	37	23	21
Other	135	227	178
Total Spending Per Visitor/Trip	\$2,607	\$2,825	\$2,667

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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Australia (n = 551)	Leisure Visitors from Australia (n = 412)
Payment Method for Trip Expenses			
Credit Cards	53%	49%	44%
Cash	37	38	42
Debit Cards	6	11	12
Travelers Checks	3	2	2
Total	100%	100%	100%
Age			
Average Age - Males	41	43	42
Average Age - Females	38	42	42
Occupation			
Manager/Executive	34%	23%	18%
Professional/Technical	32	36	37
Student	8	5	5
Clerical/Sales	7	7	8
Retired	6	10	11
Other	13	19	22
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	3%	2%
\$20,000 - \$39,999	10	9	10
\$40,000 - \$59,999	13	11	12
\$60,000 - \$79,999	11	16	17
\$80,000 - \$99,999	11	11	11
\$100,000 - \$119,999	11	11	12
\$120,000 - \$139,999	7	7	7
\$140,000 - \$159,999	6	7	7
\$160,000 - \$179,999	4	5	4
\$180,000 - \$199,999	3	9	10
\$200,000 and over	18	12	8
Total	100%	100%	100%
Average Annual Income	\$107,200	\$110,200	\$105,500

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