

CHARACTERISTICS OF TRAVELERS FROM AUSTRALIA TO CALIFORNIA - 2009

Australia was California's third largest overseas market with approximately 369,000 visitors to California in 2009. Collectively visitors from Australia spent approximately \$427 million in California.

Australian visitors to California during 2009 reported spending \$130 per day during an 8.9 night average stay or approximately \$1,157 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

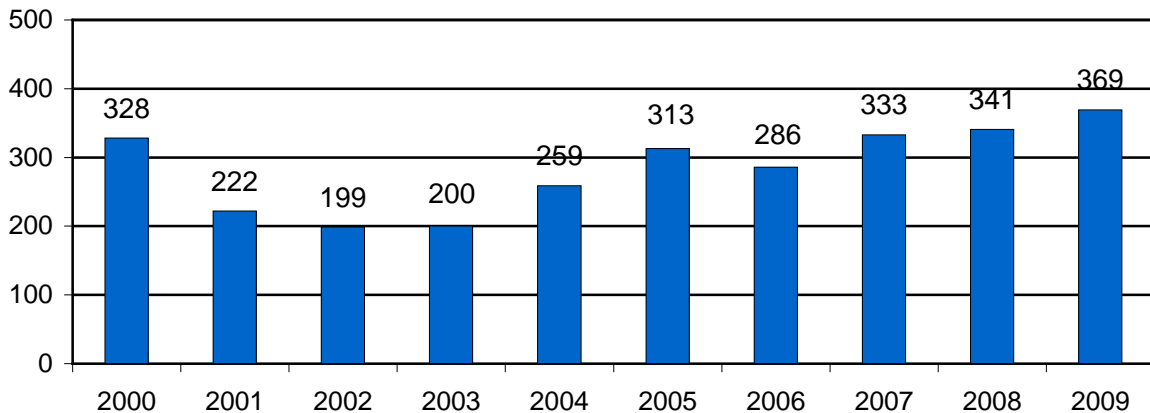
Visitors From Australia

| Year | Total U.S. Arrivals ¹ | California Market Share ² | Visitors to California (est.) |
|------|----------------------------------|--------------------------------------|-------------------------------|
| 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 |
| 2009 | 723,576 | 51.0% | 369,000 |

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, 2000-2009 (in 000s)



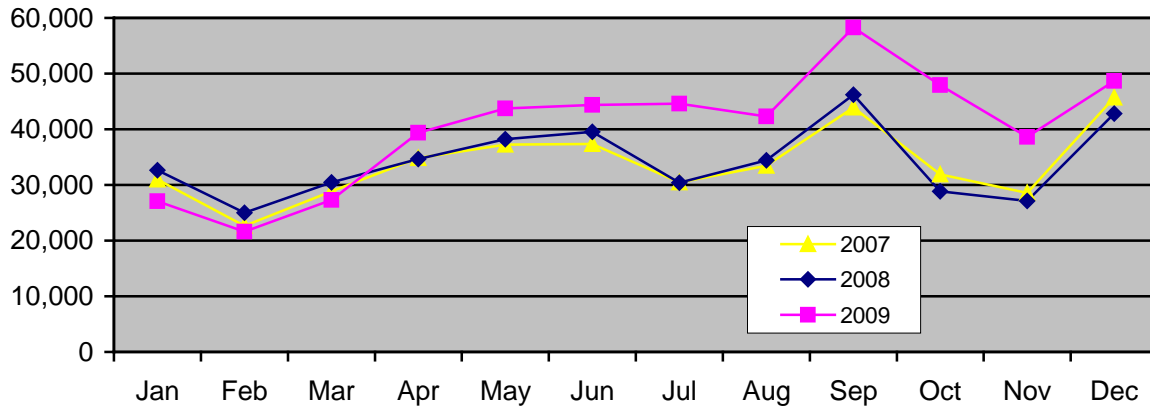
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 369,000 visitors in 2009.

Australian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Australia to California were higher in most of 2009 compared with 2007 and 2008. 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
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 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
- Stay in a hotel or motel
- Be on their first trip to the U.S.
- Visit Los Angeles and New York City while in the U.S.
- Go sightseeing in cities, visit amusement or theme parks, visit art galleries or museums, and go on guided tours
- Make use of a taxi/limousine, airlines in the U. S., and city subway/tram/bus 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:

- Stay in a private home

Characteristics of Travelers from Australia to California, 2009

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 7,255) | All Visitors from Australia (n = 403) | Leisure Visitors from Australia (n = 304) |
|-------------------------------------|--|--|--|
| Primary Purpose of Trip | | | |
| Leisure/Recreation/Holidays | 47% | 58% | 76% |
| Business/Professional | 22% | 16% | - |
| Visit Friends/Relatives | 21% | 18% | 24% |
| Convention/Conference | 6% | 5% | - |
| Other Purpose | 5% | 3% | - |
| Total | 100% | 100% | 100% |
| Purpose of Trip** | | | |
| Leisure/Recreation/Holidays | 65% | 81% | 92% |
| Visit Friends/Relatives | 37% | 37% | 41% |
| Business/Professional | 26% | 18% | 3% |
| Convention/Conference | 8% | 7% | 1% |
| Sources Used to Plan Trip** | | | |
| Airlines Directly | 23% | 15% | 15% |
| Corporate Travel Department | 8% | 6% | 1% |
| Personal Computer | 43% | 41% | 45% |
| Friends/Relatives | 18% | 23% | 27% |
| Newspapers/Magazines | 3% | 4% | 5% |
| State/City Travel Office | 4% | 4% | 4% |
| Tour Company | 7% | 7% | 9% |
| Travel Agency | 40% | 66% | 68% |
| Travel Guides | 10% | 11% | 10% |
| Advance Planning for Trip | | | |
| 7 days or less | 7% | 5% | 1% |
| 8 - 30 days | 28% | 17% | 10% |
| 31 - 60 days | 19% | 14% | 13% |
| 61 - 90 days | 12% | 13% | 15% |
| More than 3 Months | 34% | 51% | 61% |
| Total | 100% | 100% | 100% |
| Average Planning Time in Days | 100 days | 149 days | 169 days |
| Advance Airline Reservations | | | |
| 7 days or less | 13% | 7% | 3% |
| 8 - 30 days | 38% | 24% | 16% |
| 31 - 60 days | 16% | 17% | 17% |
| 61 - 90 days | 10% | 15% | 16% |
| 91 - 120 days | 6% | 8% | 10% |
| 121 - 180 days | 10% | 18% | 23% |
| 6 Months or More | 7% | 12% | 16% |
| Total | 100% | 100% | 100% |
| Average Booking in Days | 67 days | 98 days | 118 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
(2009 - cont.)**

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 7,255) | All Visitors from Australia (n = 403) | Leisure Visitors from Australia (n = 304) |
|---|--|---|--|
| Means of Booking Air Trip | | | |
| Airlines Directly | 13% | 7% | 7% |
| Corporate Travel Department | 9% | 5% | - |
| Personal Computer | 25% | 17% | 18% |
| Travel Agent | 46% | 68% | 72% |
| Travel Club | 1% | - | - |
| Tour Operator | 5% | 2% | 1% |
| Other/Don't Know | 2% | 1% | 1% |
| Total | 100% | 100% | 100% |
| Main Factor in Selecting Airline | | | |
| Airfare | 32% | 41% | 50% |
| Schedule | 13% | 9% | 10% |
| Non-Stop Flight | 12% | 3% | 4% |
| Mileage Bonus/Frequent Flyer Program | 10% | 5% | 3% |
| Previous Good Experience | 9% | 17% | 10% |
| Safety Reputation | 6% | 7% | 8% |
| Airline Loyalty | 4% | 4% | 5% |
| In-flight Service | 5% | 2% | 2% |
| Employer policy | 3% | 2% | 2% |
| Other | 6% | 10% | 6% |
| Total | 100% | 100% | 100% |
| Airline Seating Area | | | |
| Economy/Tourist/Coach | 81% | 82% | 90% |
| Executive/Business | 17% | 17% | 10% |
| First Class | 2% | 1% | 1% |
| Total | 100% | 100% | 100% |
| Use of Package | | | |
| Yes | 14% | 15% | 16% |
| No | 86% | 85% | 84% |
| Total | 100% | 100% | 100% |
| Advance Package Booking | | | |
| 7 days or less | 4% | 2% | 2% |
| 8 - 30 days | 24% | 11% | 12% |
| 31 - 60 days | 13% | 18% | 16% |
| 61 - 90 days | 13% | 7% | 8% |
| 91 - 120 days | 8% | 9% | 9% |
| 121 - 180 days | 18% | 20% | 19% |
| 6 Months or More | 20% | 32% | 34% |
| Total | 100% | 100% | 100% |

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

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

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

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 7,255) | All Visitors from Australia (n = 403) | Leisure Visitors from Australia (n = 304) |
|---|--|---|--|
| Travel Companions** | | | |
| Business Associates | 8% | 8% | - |
| Family/Relatives | 25% | 32% | 39% |
| Friends | 11% | 11% | 14% |
| Spouse | 28% | 32% | 36% |
| Tour Group | 2% | 1% | 1% |
| Traveling Alone | 38% | 30% | 25% |
| Average Travel Party Size | 1.6 | 1.7 | 1.8 |
| Median Travel Party Size | 1.0 | 1.0 | 2.0 |
| Type of Lodging** | | | |
| Hotel / Motel | 76% | 86% | 84% |
| Private Home | 30% | 19% | 20% |
| Other | 4% | 3% | 4% |
| Length of Stay | | | |
| Mean Nights in the U.S. | 22.4 nights | 22.7 nights | 23.1 nights |
| Mean Nights in California | 11.7 nights | 8.9 nights | 8.6 nights |
| % of California Nights | 52% | 39% | 37% |
| Prior Visitation to the U.S. | | | |
| First Trip to the U.S. (% Yes) | 28% | 49% | 57% |
| Average Trips to the U.S. in Past Year | 1.7 trips | 1.2 trips | 1.2 trips |
| Average Trips to the U.S. in Past 5 Years | 5.2 trips | 2.8 trips | 2.0 trips |
| Average Number of States Visited | 2.1 states | 2.7 states | 2.8 states |
| Average Number of Destinations Visited | 3.0 dest. | 3.6 dest. | 3.7 dest. |
| Places Visited in the U.S.** | | | |
| Los Angeles | 55% | 69% | 71% |
| San Francisco | 48% | 41% | 40% |
| Las Vegas | 30% | 35% | 43% |
| New York City | 18% | 44% | 51% |
| San Diego | 13% | 10% | 13% |
| Anaheim-Santa Ana | 7% | 14% | 16% |
| Grand Canyon | 7% | 4% | 4% |
| San Jose | 6% | 2% | 1% |
| Yosemite | 4% | 2% | 2% |
| Chicago | 4% | 3% | 3% |
| DC Metro Area | 4% | 9% | 10% |
| Monterey-Salinas | 4% | 1% | 2% |
| Riverside/San Bernardino | 4% | 1% | 1% |
| Seattle | 3% | 2% | 3% |
| Sacramento | 3% | 1% | 1% |
| Santa Barbara | 3% | 2% | 2% |
| Oakland | 2% | 4% | - |

* 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
(2009 - cont.)**

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 7,255) | All Visitors from Australia (n = 403) | Leisure Visitors from Australia (n = 304) |
|---|--|---|--|
| Activities Experienced While in the U.S.** | | | |
| Shopping | 87% | 91% | 93% |
| Dining Out | 86% | 91% | 91% |
| Sightseeing in Cities | 56% | 65% | 74% |
| Historical Places | 45% | 61% | 67% |
| National Parks | 39% | 31% | 36% |
| Amusement/Theme Parks | 39% | 47% | 57% |
| Visiting Small Towns | 38% | 37% | 44% |
| Cultural Heritage Sites | 32% | 35% | 40% |
| Touring Countryside | 31% | 33% | 38% |
| Casinos/Gambling | 27% | 28% | 34% |
| Art Gallery/Museum | 26% | 37% | 41% |
| Guided Tours | 24% | 42% | 53% |
| Transportation While in the U.S.** | | | |
| Airlines in U.S. | 39% | 55% | 55% |
| Taxi/Limousine | 39% | 64% | 60% |
| Rented Auto | 38% | 25% | 24% |
| Company or Private Auto | 29% | 23% | 24% |
| City Subway/Tram/Bus | 26% | 41% | 42% |
| Railroad between Cities | 11% | 19% | 22% |
| Bus between Cities | 10% | 14% | 16% |
| Motor Home/Camper | 2% | 1% | 1% |
| Visitor Spending in the U.S. | | | |
| Per Travel Party Per Trip (U.S.) | \$3,584 | \$5,121 | \$5,231 |
| Per Visitor/Trip (U.S.) | \$2,308 | \$2,960 | \$2,920 |
| Per Visitor Per Day | \$103 | \$130 | \$127 |
| Per Visitor/Trip (California) | \$1,205 | \$1,157 | \$1,092 |
| Spending by Category (Per Visitor/Trip) | | | |
| Lodging | \$660 | \$901 | \$780 |
| Food/Beverages | \$463 | \$505 | \$486 |
| Gifts/Souvenirs | \$395 | \$448 | \$504 |
| Transportation in the U.S. | \$348 | \$425 | \$396 |
| Entertainment | \$234 | \$515 | \$643 |
| Expenses at the Airport | \$34 | \$25 | \$26 |
| Other | \$174 | \$141 | \$85 |
| Total Spending Per Visitor/Trip | \$2,308 | \$2,960 | \$2,920 |

* 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
(2009 - cont.)**

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 7,255) | All Visitors from Australia (n = 403) | Leisure Visitors from Australia (n = 304) |
|--|---|--|--|
| Payment Method for Trip Expenses | | | |
| Credit Cards | 50% | 42% | 36% |
| Cash | 41% | 37% | 39% |
| Debit Cards | 7% | 19% | 24% |
| Travelers Checks | 2% | 2% | 2% |
| Total | 100% | 100% | 100% |
| Age | | | |
| Average Age - Males | 43 years | 45 years | 46 years |
| Average Age - Females | 39 years | 41 years | 43 years |
| Occupation | | | |
| Professional/Technical | 35% | 37% | 29% |
| Manager/Executive | 28% | 20% | 18% |
| Student | 10% | 9% | 10% |
| Retired | 8% | 7% | 9% |
| Clerical/Sales | 7% | 10% | 13% |
| Other | 13% | 17% | 22% |
| Total | 100% | 100% | 100% |
| Annual Household Income | | | |
| Under \$20,000 | 9% | 5% | 5% |
| \$20,000 - \$39,999 | 14% | 11% | 14% |
| \$40,000 - \$59,999 | 14% | 13% | 15% |
| \$60,000 - \$79,999 | 13% | 13% | 14% |
| \$80,000 - \$99,999 | 11% | 13% | 13% |
| \$100,000 - \$119,999 | 9% | 13% | 16% |
| \$120,000 - \$139,999 | 6% | 5% | 6% |
| \$140,000 - \$159,999 | 5% | 12% | 6% |
| \$160,000 - \$179,999 | 3% | 2% | 2% |
| \$180,000 - \$199,999 | 3% | 7% | 4% |
| \$200,000 and over | 12% | 7% | 5% |
| Total | 100% | 100% | 100% |
| Average Annual Income | \$94,800 | \$100,300 | \$89,500 |

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

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