

CHARACTERISTICS OF TRAVELERS FROM INDIA TO CALIFORNIA – 2007

India was one of California's large overseas markets with approximately 176,000 visitors to California in 2007. Collectively visitors from India spent approximately \$220 million in California.

Indian visitors to California during 2007 reported spending \$61 per day during a 20.5 night average stay or approximately \$1,251 per visitor. The average spending for all overseas visitors to California was about \$1,166 (\$111 per day; 10.5 nights in California).

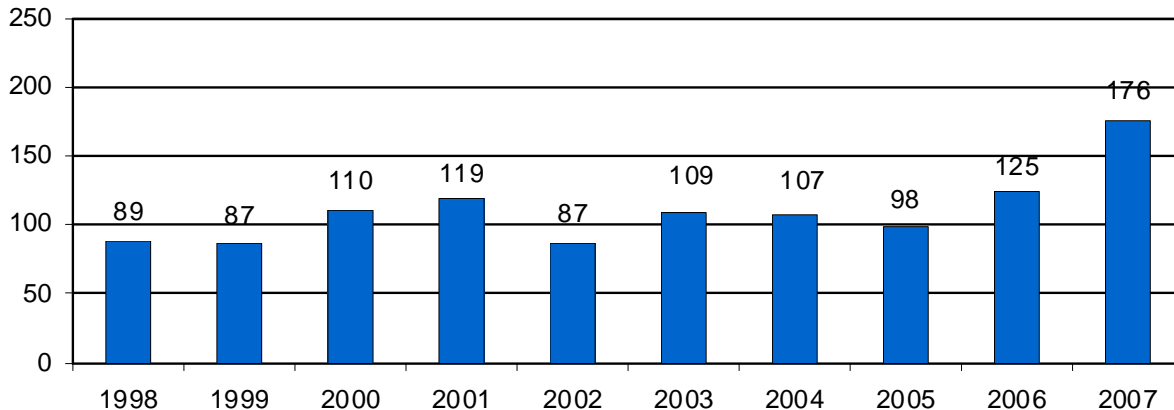
Visitors From India

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1997	173,327	35.7%	62,000
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

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, 1998-2007
(in 000s)**



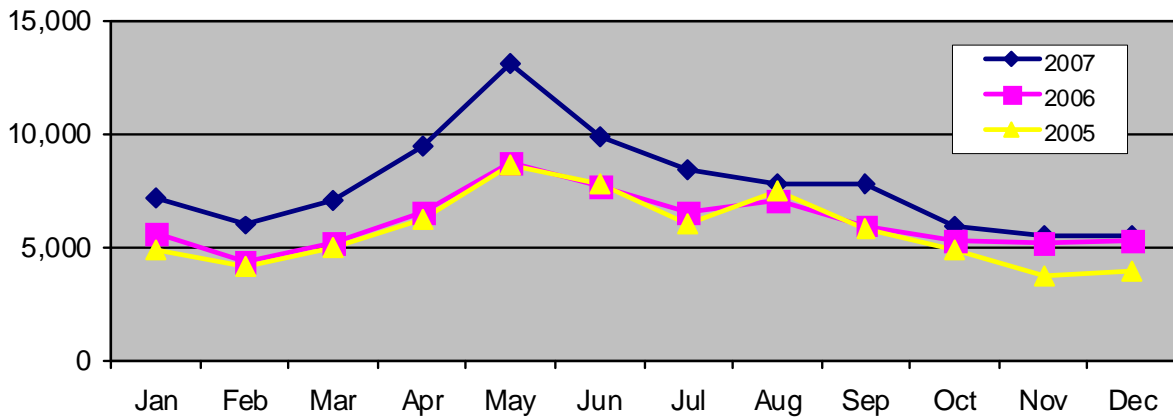
Source: International Trade Administration, Office of Travel and Tourism Industries.

Since the middle of the 1990s India has grown dramatically as a source of visitors to California from just 41,000 to 176,000 visitors. Visitation to California from India dipped in 2002 to 87,000 down from the previous year's high of 119,000. However, the ongoing large increases in annual visitor volume to the U.S. from India and a slight increase in California's market share of those visitors in the last three years have resulted in a record high of 176,000 visitors in 2007.

Indian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from India to California were higher in 2007 compared with 2005 and 2006. There was, however, a decrease in passenger arrivals from India in the first 4 months of 2008. 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
2005-2007**



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 travel agent or a corporate travel department for trip planning and booking an air trip
- Have shorter trip planning and advance airline booking horizons
- Travel alone
- Stay in a private home
- Visit the U.S. and California for a lengthy stay
- Visit San Francisco, San Jose, and Chicago
- Spend a higher percentage of their travel dollar on transportation in the U.S.
- 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 or information from airlines to plan their trip
- Make use of a travel package
- Travel with family or relatives
- Stay in a hotel or other paid lodging
- Visit Los Angeles
- Visit small towns, national parks, or cultural heritage sites
- Rent an auto or use a company/private auto for transportation while in the U.S.
- Use credit cards to pay for trip expenses

Characteristics of Travelers from India to California – 2007

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from India (n = 261)	Leisure Visitors from India (n = 84)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	37%	9%	26%
Visit Friends/Relatives	20	24	74
Business/Professional	31	61	-
Convention/Conference	8	4	-
Other Purpose	4	2	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	55%	27%	50%
Visit Friends/Relatives	38	45	82
Business/Professional	35	61	3
Convention/Conference	13	9	-
Sources Used to Plan Trip**			
Airlines Directly	19%	7%	6%
Corporate Travel Department	12	21	-
Personal Computer	36	16	17
Friends/Relatives	15	13	27
Newspapers/Magazines	3	1	4
State/City Travel Office	3	1	2
Tour Company	5	2	2
Travel Agency	48	61	66
Travel Guides	9	2	5
Advance Planning for Trip			
7 days or less	9%	14%	11%
8 - 30 days	36	53	25
31 - 60 days	20	17	28
61 - 90 days	11	7	14
More than 3 Months	25	5	14
Total	100%	100%	100%
Average Planning Time in Days	81	40	68
Advance Airline Reservations			
7 days or less	16%	23%	13%
8 - 30 days	43	53	36
31 - 60 days	16	16	39
61 - 90 days	8	4	7
91 - 120 days	6	2	-
121 - 180 days	6	2	5
6 Months or More	5	0	1
Total	100%	100%	100%
Average Booking in Days	55	28	44

* 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
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from India (n = 261)	Leisure Visitors from India (n = 84)
Means of Booking Air Trip			
Airlines Directly	10%	2%	6%
Corporate Travel Department	12	23	0
Personal Computer	18	4	3
Travel Agent	54	69	91
Travel Club	-	0	-
Tour Operator	4	1	-
Other/Don't Know	2	1	0
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	23%	32%
Schedule	16	17	14
Non-Stop Flight	12	8	16
Mileage Bonus/Frequent Flyer Program	11	1	-
Previous Good Experience	9	12	17
Safety Reputation	7	3	4
Airline Loyalty	5	1	1
In-flight Service	5	14	6
Employer policy	4	6	-
Other	6	15	10
Airline Seating Area			
Economy/Tourist/Coach	78%	78%	85%
Executive/Business	19	20	12
First Class	4	1	3
Total	100%	100%	100%
Use of Package			
Yes	13%	3%	3%
No	87	97	97
Total	100%	100%	100%
Advance Package Booking			
7 days or less	5%	0%	0%
8 - 30 days	32	61	100
31 - 60 days	18	39	-
61 - 90 days	11	-	-
91 - 120 days	11	-	-
121 - 180 days	8	-	-
6 Months or More	15	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from India to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from India (n = 261)	Leisure Visitors from India (n = 84)
Travel Companions**			
Business Associates	12%	8%	-
Family/Relatives	23	12	24%
Friends	8	2	3
Spouse	25	20	52
Tour Group	2	-	-
Traveling Alone	41	64	34
Average Travel Party Size	1.5	1.2	1.6
Type of Lodging**			
Hotel / Motel	78%	62%	30%
Private Home	29	55	80
Other	3	2	3
Length of Stay			
Mean Nights in the U.S.	19.2	39.4	51.6
Mean Nights in California	10.5	20.5	26.4
% of California Nights	55%	52%	51%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	21%	26%	35%
Average Trips to the U.S. in Past Year	2.0	1.9	1.2
Average Trips to the U.S. in Past 5 Years	6.6	6.3	2.5
Average Number of States Visited	2.0	2.4	2.3
Average Number of Destinations Visited	2.7	3.1	3.1
Places Visited in the U.S.**			
Los Angeles	51%	38%	47%
San Francisco	44	50	49
Las Vegas	23	17	29
New York City	15	15	17
San Diego	12	7	7
San Jose	8	19	11
Anaheim	8	13	11
Grand Canyon	4	1	1
Chicago	4	15	5
Yosemite	3	1	-
DC Metro Area	3	8	5
Seattle	3	2	1
Monterey	3	0	0
Sacramento	3	6	12
Riverside/San Bernardino	2	1	1
Oahu/Honolulu	2	-	-
Miami	2	2	2
Oakland	2	6	11

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**Characteristics of Travelers from India to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from India (n = 261)	Leisure Visitors from India (n = 84)
Activities Experienced While in the U.S.**			
Shopping	86%	92%	97%
Dining Out	86	79	85
Sightseeing in Cities	51	47	56
Historical Places	37	28	43
Amusement/Theme Parks	33	35	53
Visiting Small Towns	31	12	23
National Parks	30	19	30
Touring Countryside	27	20	25
Cultural Heritage Sites	24	9	14
Casinos/Gambling	23	17	39
Art Gallery/Museum	21	23	29
Guided Tours	21	17	28
Transportation While in the U.S.**			
Taxi/Limousine	41%	48%	33%
Airlines in U.S.	38	44	46
Rented Auto	36	26	24
Company or Private Auto	31	16	26
City Subway/Tram/Bus	21	14	7
Railroad between Cities	10	15	20
Bus between Cities	9	7	10
Motor Home/Camper	2	10	20
Spending by Category (Per Visitor/Trip)			
Lodging	\$657	\$770	\$177
Food/Beverages	399	355	246
Gifts/Souvenirs	364	430	527
Transportation in the U.S.	336	553	347
Entertainment	194	129	155
Expenses at the Airport	37	25	27
Other	148	143	63
Total Spending Per Visitor/Trip	\$2,135	\$2,405	\$1,542
Visitor Spending in the U.S.			
Per Travel Party Per Trip	\$3,235	\$2,960	\$2,487
Per Visitor/Trip	2,135	2,405	1,542
Per Person Per Day	111	61	30

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**Characteristics of Travelers from India to California
(2007 - cont.)**

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Payment Method for Trip Expenses			
Credit Cards	54%	41%	29%
Cash	39	42	53
Debit Cards	5	6	7
Travelers Checks	3	11	11
Total	100%	100%	100%
Age			
Average Age - Males	43.3	39.9	49.7
Average Age - Females	39.6	44.8	46.4
Occupation			
Manager/Executive	37%	48%	26%
Professional/Technical	34	39	42
Student	7	1	-
Clerical/Sales	7	0	-
Retired	6	5	15
Other	10	8	17
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	21%	33%
\$20,000 - \$39,999	11	17	17
\$40,000 - \$59,999	13	15	8
\$60,000 - \$79,999	13	8	7
\$80,000 - \$99,999	12	8	3
\$100,000 - \$119,999	10	8	8
\$120,000 - \$139,999	7	12	9
\$140,000 - \$159,999	5	2	3
\$160,000 - \$179,999	3	1	1
\$180,000 - \$199,999	3	2	5
\$200,000 and over	16	6	8
Total	100%	100%	100%
Average Annual Income	\$101,300	\$72,800	\$70,700

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