

## CHARACTERISTICS OF TRAVELERS FROM JAPAN TO CALIFORNIA - 2010

Japan was California's second largest overseas market with approximately 545,000 visitors to California in 2010 (U.K. = 683,000). Collectively visitors from Japan spent approximately \$425 million in California (U.K. = \$732 million).

Japanese visitors to California during 2010 reported spending \$113 per day during a 6.9 night average stay or approximately \$780 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

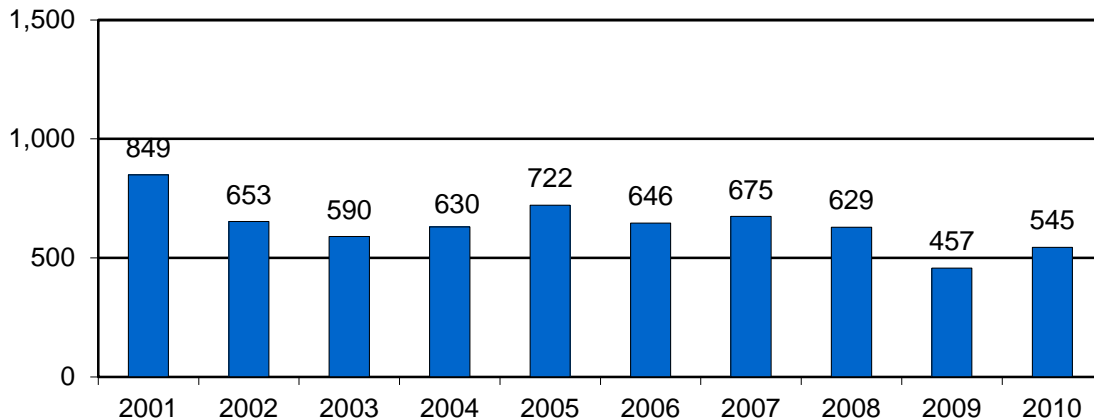
### Visitors From Japan

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2000	5,061,377	21.8%	1,103,000
2001	4,082,661	20.8%	849,000
2002	3,627,264	18.0%	653,000
2003	3,169,682	18.6%	590,000
2004	3,747,620	16.8%	630,000
2005	3,883,906	18.6%	722,000
2006	3,672,584	17.6%	646,000
2007	3,531,489	19.1%	675,000
2008	3,249,578	19.4%	629,000
2009	2,918,268	15.7%	457,000
2010	3,386,076	16.1%	545,000

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 Japan to California, 2001-2010 (in 000s)



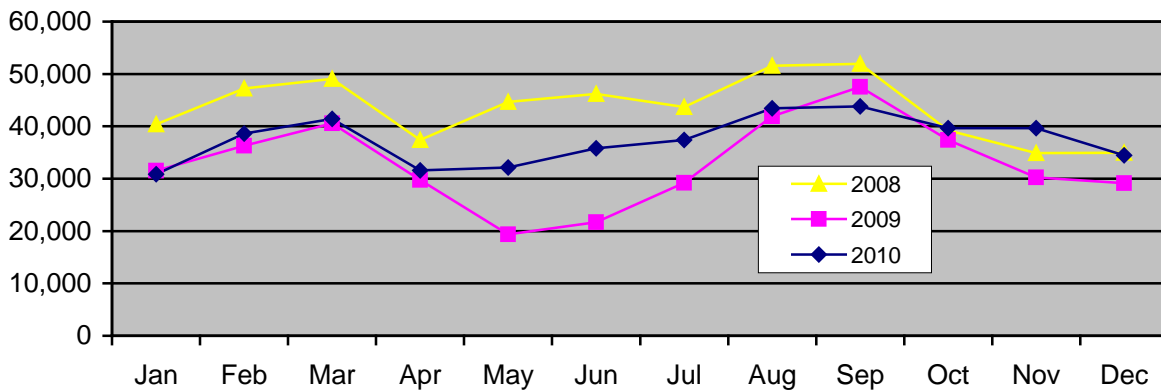
Source: International Trade Administration, Office of Travel and Tourism Industries.

During the 1980s and 1990s Japan was California's top overseas market. However, travel from Japan declined to a 10-year low in 2003 following the 9-11 terrorist attacks and the SARS crisis. Japanese residents have increased short haul travel to other Asian countries in recent years, but travel to the U.S. has not recovered to the pre 9-11 level. In 2009, the number of overseas visitors from Japan to California dropped even lower than the 2003 level, to 457,000 visitors, and the lowest market share in 10 years (15.8%). In 2010 the number of overseas visitors from Japan to California rose up again to 545,000.

### Japanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Japan to California were higher in most months of 2010 than in 2009 but still lower than they were in 2008. In general, Japanese resident arrivals at California ports-of-entry peaked in March and August/September. The lowest volumes were recorded in January and April.

**Residents of Japan  
Monthly Port of Entry Arrivals to California  
(2008-2010)**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

## Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Japan 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 Japan are more likely to:

- Travel to California for business purposes
- Have decidedly lower trip planning and advance airline booking horizons
- Select an airline due to the Mileage Bonus/Frequent Flyer Program
- Mention airline loyalty as a main factor in selecting an airline
- Travel in executive or business class
- Travel with business associates
- Have a shorter stay in the U.S. and California
- Use a company or private auto for transportation
- Have a higher average annual household income

Conversely, visitors from Japan are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Travel in economy/tourist/coach class
- Travel with a spouse
- Be on their first trip to the U.S.
- Visit Las Vegas, San Francisco and New York City as part of their trip
- Experience leisure-oriented activities, such as visiting amusement/theme parks, historical places, small towns, cultural heritage sites, casinos, national parks, the countryside, art galleries and museums and sightseeing in cities

## Characteristics of Travelers from Japan to California – 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Japan (n = 1,205)	Leisure Visitors from Japan (n = 588)
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	48%	33%	61%
Visit Friends/Relatives	22%	21%	39%
Business/Professional	21%	33%	-
Convention/Conference	5%	8%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	67%	51%	80%
Visit Friends/Relatives	39%	29%	48%
Business/Professional	24%	38%	6%
Convention/Conference	9%	15%	1%
<b>Sources Used to Plan Trip**</b>			
Personal Computer	44%	46%	59%
Travel Agency	40%	42%	37%
Airlines Directly	23%	19%	22%
Friends/Relatives	17%	15%	23%
Travel Guides	10%	12%	17%
Corporate Travel Department	8%	12%	2%
Tour Company	5%	10%	13%
State/City Travel Office	4%	2%	3%
Newspapers/Magazines	3%	2%	3%
<b>Advance Planning for Trip</b>			
7 days or less	6%	9%	5%
8 - 30 days	28%	38%	29%
31 - 60 days	20%	29%	35%
61 - 90 days	12%	11%	15%
More than 3 Months	34%	13%	17%
Total	100%	100%	100%
Average Planning Time in Days	98 days	58 days	71 days
<b>Advance Airline Reservations</b>			
7 days or less	12%	16%	8%
8 - 30 days	38%	51%	45%
31 - 60 days	17%	19%	25%
61 - 90 days	10%	7%	11%
91 - 120 days	7%	3%	4%
121 - 180 days	10%	3%	5%
6 Months or More	7%	1%	3%
Total	100%	100%	100%
Average Booking in Days	68 days	40 days	53 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 Japan to California  
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Japan (n = 1,205)	Leisure Visitors from Japan (n = 588)
<b>Means of Booking Air Trip</b>			
Travel Agent	46%	43%	40%
Personal Computer	26%	23%	34%
Airlines Directly	13%	14%	14%
Corporate Travel Department	8%	12%	2%
Tour Operator	4%	6%	8%
Travel Club	1%	-	-
Other/Don't Know	2%	3%	3%
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	25%	32%
Schedule	14%	9%	9%
Non-Stop Flight	14%	5%	6%
Mileage Bonus/Frequent Flyer Program	10%	23%	21%
Previous Good Experience	9%	4%	4%
Safety Reputation	8%	7%	6%
Airline Loyalty	4%	14%	13%
In-flight Service	4%	5%	4%
Employer policy	3%	4%	-
Other	6%	4%	5%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	84%	66%	76%
Executive/Business	15%	32%	23%
First Class	2%	3%	2%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	10%	15%
No	86%	90%	85%
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	6%	9%
8 - 30 days	27%	26%	25%
31 - 60 days	15%	38%	40%
61 - 90 days	10%	23%	22%
91 - 120 days	11%	6%	5%
121 - 180 days	20%	2%	2%
6 Months or More	14%	1%	-
Total	100%	100%	100%

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**Characteristics of Travelers from Japan to California  
(2010 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 7,760)</b>	<b>All Visitors from Japan (n = 1,205)</b>	<b>Leisure Visitors from Japan (n = 588)</b>
<b>Travel Companions**</b>			
Traveling Alone	39%	43%	35%
Spouse	27%	17%	28%
Family/Relatives	25%	18%	30%
Friends	11%	10%	15%
Business Associates	8%	19%	3%
Tour Group	2%	2%	3%
<b>Average Travel Party Size</b>	1.6	1.5	1.6
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	78%	85%	76%
Private Home	29%	20%	33%
Other	4%	3%	3%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.8 nights	14.2 nights	14.6 nights
Mean Nights in California	11.3 nights	6.9 nights	6.8 nights
% of California Nights	50%	49%	47%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	13%	17%
Average Trips to the U.S. in Past Year	1.8 trips	2.1 trips	1.6 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	7.4 trips	4.8 trips
<b>Average Number of States Visited</b>	2.1 states	1.5 states	1.4 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	2.0 dest.	2.0 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	53%	61%
San Francisco	47%	34%	32%
Las Vegas	29%	10%	16%
New York City	16%	6%	4%
San Diego	14%	11%	11%
Flagstaff	8%	3%	4%
Anaheim-Santa Ana	7%	11%	13%
Grand Canyon	5%	2%	3%
San Jose	5%	9%	5%
DC Metro Area	5%	1%	-
Yosemite	4%	2%	3%
Chicago	4%	2%	-
Monterey-Salinas	4%	1%	2%
Miami	4%	3%	-
Riverside/San Bernardino	4%	1%	1%
Seattle	3%	4%	1%
Sacramento	3%	1%	1%

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**Characteristics of Travelers from Japan to California  
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Japan (n = 1,205)	Leisure Visitors from Japan (n = 588)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	83%	90%
Dining Out	85%	88%	86%
Sightseeing in Cities	57%	46%	56%
Historical Places	47%	12%	16%
Amusement/Theme Parks	40%	22%	31%
National Parks	38%	13%	21%
Visiting Small Towns	38%	28%	39%
Cultural Heritage Sites	31%	9%	13%
Touring Countryside	31%	13%	20%
Art Gallery/Museum	26%	12%	15%
Casinos/Gambling	25%	9%	12%
Guided Tours	23%	15%	23%
<b>Transportation While in the U.S.**</b>			
Rented Auto	41%	32%	29%
Taxi/Limousine	39%	42%	30%
Airlines in U.S.	37%	29%	23%
Company or Private Auto	28%	38%	41%
City Subway/Tram/Bus	25%	22%	27%
Railroad between Cities	12%	11%	12%
Bus between Cities	10%	6%	9%
Motor Home/Camper	2%	-	-
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,797	\$2,386	\$2,199
Per Visitor/Trip (U.S.)	\$2,435	\$1,609	\$1,367
Per Visitor Per Day	\$107	\$113	\$93
Per Visitor/Trip (California)	\$1,209	\$780	\$632
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$661	\$530	\$322
Food/Beverages	\$514	\$288	\$281
Gifts/Souvenirs	\$421	\$279	\$323
Transportation in the U.S.	\$384	\$245	\$178
Entertainment	\$243	\$117	\$155
Expenses at the Airport	\$34	\$42	\$43
Other	\$179	\$108	\$64
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,435</b>	<b>\$1,609</b>	<b>\$1,367</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	52%	59%	48%
Cash	39%	36%	48%
Debit Cards	7%	4%	2%
Travelers Checks	1%	1%	2%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	43 years	47 years	48 years
Average Age - Females	40 years	42 years	42 years
<b>Occupation</b>			
Professional/Technical	33%	26%	25%
Manager/Executive	29%	37%	21%
Student	10%	5%	7%
Retired	9%	7%	13%
Clerical/Sales	8%	13%	16%
Other	12%	12%	19%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	8%	3%	4%
\$20,000 - \$39,999	13%	6%	9%
\$40,000 - \$59,999	14%	9%	13%
\$60,000 - \$79,999	13%	10%	13%
\$80,000 - \$99,999	11%	14%	14%
\$100,000 - \$119,999	11%	16%	15%
\$120,000 - \$139,999	7%	9%	8%
\$140,000 - \$159,999	6%	7%	6%
\$160,000 - \$179,999	3%	4%	3%
\$180,000 - \$199,999	3%	7%	4%
\$200,000 and over	13%	14%	11%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$117,000	\$95,200

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