

CHARACTERISTICS OF TRAVELERS FROM SOUTH KOREA TO CALIFORNIA – 2008

South Korea was California's sixth largest overseas markets with approximately 300,000 visitors to California in 2008. Collectively visitors from South Korea spent approximately \$370 million in California.

South Korean visitors to California during 2008 reported spending \$67 per day during an 18.4 night average stay or approximately \$1,233 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

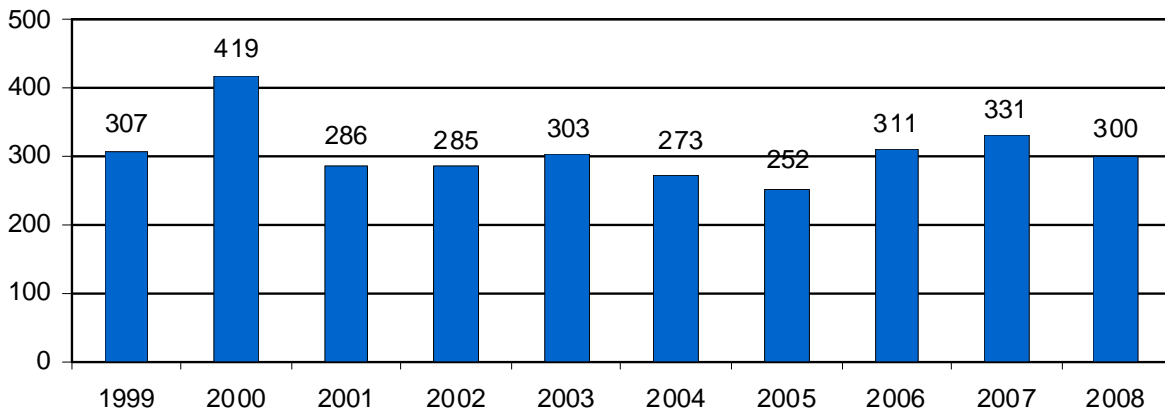
Visitors From South Korea

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	364,061	52.0%	189,000
1999	498,643	61.5%	307,000
2000	661,844	63.3%	419,000
2001	617,892	46.3%	286,000
2002	638,697	44.7%	285,000
2003	617,573	49.0%	303,000
2004	626,595	43.5%	273,000
2005	705,093	35.8%	252,000
2006	757,721	41.1%	311,000
2007	806,175	41.1%	331,000
2008	759,394	39.5%	300,000

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 South Korea to CA, 1999-2008
(in 000s)**



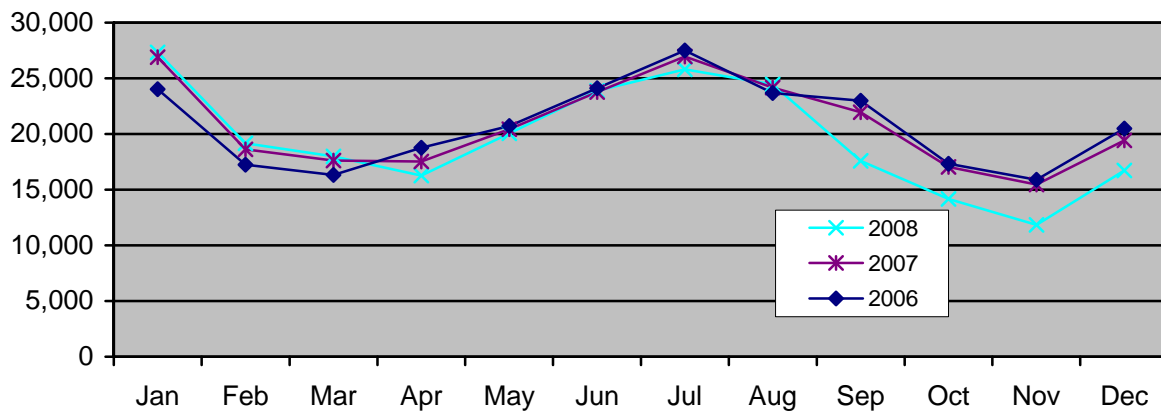
Source: International Trade Administration, Office of Travel and Tourism Industries.

Visitor volume from South Korea to California was at its peak in 2000 with 419,000 visitors. California's market share of South Korean visitors to the U.S. was at its highest that year at 63%. Since then, the percentage of South Korean visitors who visit California has not risen above 49%. The volume of visitors to California from South Korea was 300,000 in 2008.

South Korean Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from South Korea to California were consistent during the first 8 months of 2008 compared with 2006 and 2007, then declined during the last four months of 2008. In all years, South Korean resident arrivals at California ports-of-entry peaked in January and July. The lowest volumes were recorded in November.

**Residents of South Korea
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 South Korea 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 South Korea are more likely to:

- Use a travel agent to book an air trip
- Choose an airline because of a non-stop flight
- Have shorter trip planning and advance airline booking horizons
- Fly economy/tourist/coach
- Travel with business associates
- Stay longer in the U.S. and California
- Use a company or private auto for transportation while in the U.S.
- Pay cash for trip expenses
- Have a lower annual household income

Conversely, visitors from South Korea are less likely to:

- Make use of the airlines directly as a source to plan their trip
- Travel to California for leisure/recreation/holiday purposes
- Travel with a spouse
- Visit New York City
- Experience leisure activities such as dining out, visiting historical places and small towns
- Use airlines, a taxi/limousine, or public transportation while in the U.S.
- Use credit cards to pay for travel expenses

Characteristics of Travelers from South Korea to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South Korea (n = 647)	Leisure Visitors from South Korea (n = 295)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	28%	56%
Visit Friends/Relatives	19	21	44
Business/Professional	27	32	-
Convention/Conference	7	7	-
Other Purpose	5	13	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	55%	81%
Visit Friends/Relatives	37	40	66
Business/Professional	31	35	4
Convention/Conference	11	13	2
Sources Used to Plan Trip**			
Airlines Directly	21%	12%	17%
Corporate Travel Department	11	13	1
Personal Computer	42	38	48
Friends/Relatives	16	18	28
Newspapers/Magazines	3	4	6
State/City Travel Office	4	1	2
Tour Company	6	4	6
Travel Agency	43	40	39
Travel Guides	10	8	8
Advance Planning for Trip			
7 days or less	9%	10%	7%
8 - 30 days	30	45	39
31 - 60 days	19	23	26
61 - 90 days	13	11	15
More than 3 Months	30	11	13
Total	100%	100%	100%
Average Planning Time in Days	92	54	59
Advance Airline Reservations			
7 days or less	16%	21%	16%
8 - 30 days	38	55	51
31 - 60 days	17	16	22
61 - 90 days	10	5	7
91 - 120 days	5	2	3
121 - 180 days	8	1	1
6 Months or More	6	0	-
Total	100%	100%	100
Average Booking in Days	60	31	35

* 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 South Korea to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South Korea (n = 647)	Leisure Visitors from South Korea (n = 295)
Means of Booking Air Trip			
Airlines Directly	12%	10%	17%
Corporate Travel Department	11	12	2
Personal Computer	22	18	25
Travel Agent	48	57	54
Travel Club	1	0	0
Tour Operator	4	1	1
Other/Don't Know	3	2	1
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	21%	24%
Schedule	15	13	5
Non-Stop Flight	13	23	30
Mileage Bonus/Frequent Flyer Program	12	16	16
Previous Good Experience	10	7	7
Safety Reputation	7	3	2
Airline Loyalty	4	2	2
In-flight Service	5	11	10
Employer policy	4	2	-
Other	6	3	4
Airline Seating Area			
Economy/Tourist/Coach	77%	87%	89%
Executive/Business	20	13	11
First Class	3	1	0
Total	100%	100%	100%
Use of Package			
Yes	11%	14%	15%
No	89	86	85
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	9%	13%
8 - 30 days	26	54	44
31 - 60 days	23	22	26
61 - 90 days	12	11	14
91 - 120 days	5	-	-
121 - 180 days	17	1	2
6 Months or More	14	3	1
Total	100%	100%	100%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South Korea (n = 647)	Leisure Visitors from South Korea (n = 295)
Travel Companions**			
Business Associates	10%	25%	6%
Family/Relatives	23	28	43
Friends	12	3	4
Spouse	27	16	24
Tour Group	2	4	2
Traveling Alone	39	34	34
Average Travel Party Size	1.5	1.6	1.6
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	70%	52%
Private Home	28	36	61
Other	4	3	3
Length of Stay			
Mean Nights in the U.S.	21.2	34.2	23.0
Mean Nights in California	11.0	18.4	15.7
% of California Nights	52%	54%	68%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	29%	33%
Average Trips to the U.S. in Past Year	2.0	2.5	1.8
Average Trips to the U.S. in Past 5 Years	6.3	8.1	5.2
Average Number of States Visited	2.0	1.7	1.7
Average Number of Destinations Visited	2.9	2.4	2.6
Places Visited in the U.S.**			
Los Angeles	53%	58%	66%
San Francisco	49	42	52
Las Vegas	28	25	35
New York City	17	8	6
San Diego	13	12	7
San Jose	7	11	5
Anaheim-Santa Ana	7	8	8
Yosemite	5	2	3
Grand Canyon	4	4	5
Chicago	4	2	2
DC Metro Area	4	4	3
Monterey-Salinas	4	1	1
Seattle	3	3	2
Sacramento	3	2	3
Riverside/San Bernardino	3	3	4
Santa Barbara	3	1	2

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Activities Experienced While in the U.S.**			
Dining Out	87%	60%	57%
Shopping	85	80	83
Sightseeing in Cities	53	44	50
Historical Places	44	15	18
Visiting Small Towns	36	18	20
National Parks	35	35	50
Amusement/Theme Parks	34	37	47
Touring Countryside	30	21	28
Cultural Heritage Sites	28	31	36
Casinos/Gambling	24	23	29
Art Gallery/Museum	23	15	19
Guided Tours	22	14	19
Transportation While in the U.S.**			
Taxi/Limousine	42%	26%	21%
Rented Auto	40	32	22
Airlines in U.S.	36	21	19
Company or Private Auto	28	46	63
City Subway/Tram/Bus	26	15	16
Railroad between Cities	11	5	4
Bus between Cities	9	6	6
Motor Home/Camper	2	1	2
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,784	\$2,918
Per Visitor/Trip(U.S.)	2,607	2,301	1,810
Per Visitor Per Day	123	67	79
Per Visitor/Trip (California)	\$1,353	\$1,233	\$1,240
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$600	\$319
Food/Beverages	526	399	293
Gifts/Souvenirs	450	448	494
Transportation in the U.S.	425	391	296
Entertainment	234	263	190
Expenses at the Airport	37	47	48
Other	135	152	169
Total Spending Per Visitor/Trip	\$2,607	\$2,301	\$1,810

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Payment Method for Trip Expenses			
Credit Cards	53%	41%	34%
Cash	37	55	63
Debit Cards	6	3	1
Travelers Checks	3	2	2
Total	100%	100%	100%
Age			
Average Age - Males	41	40	39
Average Age - Females	38	37	38
Occupation			
Manager/Executive	34%	24%	16%
Professional/Technical	32	29	27
Student	8	17	20
Clerical/Sales	7	6	4
Retired	6	1	2
Other	13	24	32
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	5%	6%
\$20,000 - \$39,999	10	8	8
\$40,000 - \$59,999	13	15	14
\$60,000 - \$79,999	11	17	15
\$80,000 - \$99,999	11	17	14
\$100,000 - \$119,999	11	14	14
\$120,000 - \$139,999	7	9	12
\$140,000 - \$159,999	6	4	1
\$160,000 - \$179,999	4	2	2
\$180,000 - \$199,999	3	2	3
\$200,000 and over	18	8	12
Total	100%	100%	100%
Average Annual Income	\$107,200	\$94,800	\$98,900

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