# CHARACTERISTICS OF TRAVELERS FROM JAPAN TO CALIFORNIA - 2007

Japan was California's second largest overseas market with approximately 675,000 visitors to California in 2007 (U.K. = 765,000). Collectively visitors from Japan spent approximately $842 million in California (U.K. = $875 million).

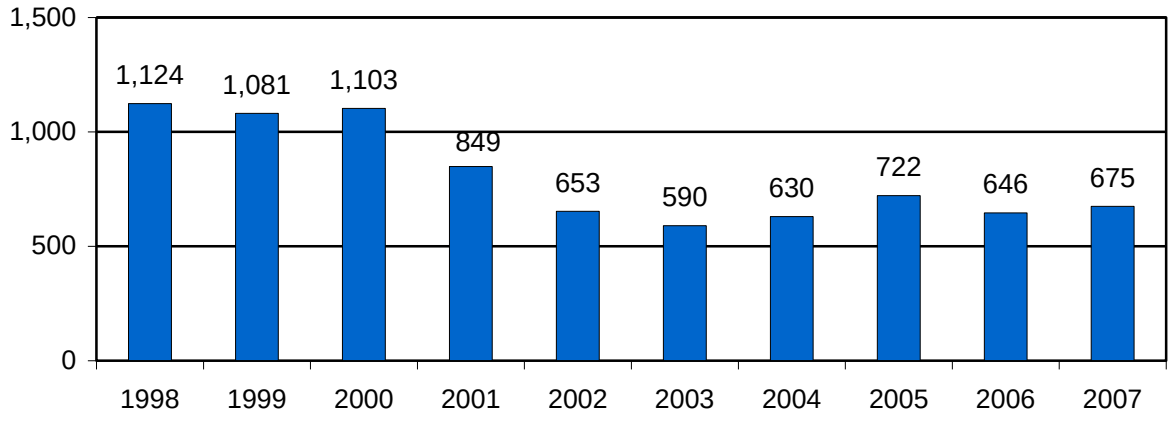
Japanese visitors to California during 2007 reported spending $162 per day during a 7.7 night average stay or approximately $1,247 per visitor. The average spending for all overseas visitors to California was about $1,166 ($111 per day; 10.5 nights in California).

**Visitors From Japan**

| Year | Total U.S. Arrivals[1] | California Market Share[2] | Visitors to California (est.) |
|---|---|---|---|
| 1997 | 5,367,578 | 23.4% | 1,256,000 |
| 1998 | 4,885,369 | 23.0% | 1,124,000 |
| 1999 | 4,826,077 | 22.4% | 1,081,000 |
| 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 |

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, 1998-2007 (in 000s)**

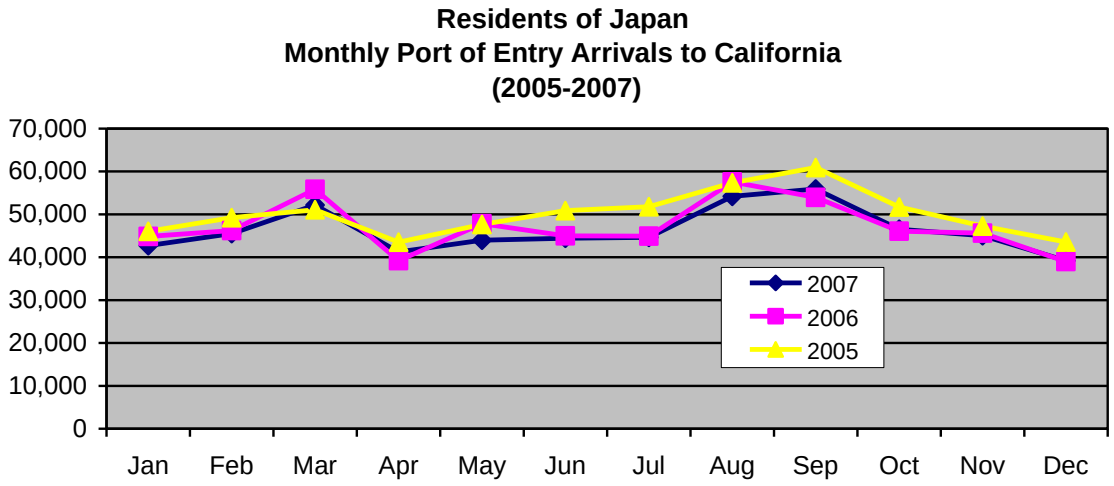



Source: International Trade Administration, Office of Travel and Tourism Industries.

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.

## Japanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Japan to California were consistent in 2007 compared with 2005 and 2006. In general, Japanese resident arrivals at California ports-of-entry peaked in March and August/September. The lowest volumes were recorded in January, April, and December.




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
- Stay in hotels and other forms of paid lodging
- Stay less time in the U.S. and California
- Spend a higher percentage of their travel dollar on lodging
- Use credit cards to pay for trip expenses

Conversely, visitors from Japan are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Mention airfare as a main factor in selecting an airline
- Travel in economy/tourist/coach class
- Visit Las Vegas and San Francisco as part of their trip
- Experience activities that are more leisure-oriented, such as visiting amusement/theme parks, national parks, the countryside, art galleries and museums

## Characteristics of Travelers from Japan to California – 2007

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 8,200) | All Visitors from Japan (n = 1,751) | Leisure Visitors from Japan (n = 731) |
|---|---|---|---|
| **Primary Purpose of Trip** | | | |
| Leisure/Recreation/Holidays | 37% | 29% | 65% |
| Visit Friends/Relatives | 20 | 16 | 35 |
| Business/Professional | 31 | 38 | - |
| Convention/Conference | 8 | 13 | - |
| Other Purpose | 4 | 5 | - |
| Total | 100% | 100% | 100% |
| **Purpose of Trip**** | | | |
| Leisure/Recreation/Holidays | 55% | 49% | 84% |
| Visit Friends/Relatives | 38 | 26 | 46 |
| Business/Professional | 35 | 40 | 2 |
| Convention/Conference | 13 | 17 | 2 |
| **Sources Used to Plan Trip**** | | | |
| Airlines Directly | 19% | 17% | 20% |
| Corporate Travel Department | 12 | 17 | 2 |
| Personal Computer | 36 | 38 | 51 |
| Friends/Relatives | 15 | 15 | 24 |
| Newspapers/Magazines | 3 | 2 | 4 |
| State/City Travel Office | 3 | 2 | 3 |
| Tour Company | 5 | 11 | 14 |
| Travel Agency | 48 | 47 | 46 |
| Travel Guides | 9 | 14 | 24 |
| **Advance Planning for Trip** | | | |
| 7 days or less | 9% | 9% | 3% |
| 8 - 30 days | 36 | 46 | 34 |
| 31 - 60 days | 20 | 21 | 31 |
| 61 - 90 days | 11 | 13 | 17 |
| More than 3 Months | 25 | 12 | 15 |
| Total | 100% | 100% | 100% |
| Average Planning Time in Days | 81 | 56 | 70 |
| **Advance Airline Reservations** | | | |
| 7 days or less | 16% | 15% | 6% |
| 8 - 30 days | 43 | 55 | 48 |
| 31 - 60 days | 16 | 16 | 25 |
| 61 - 90 days | 8 | 9 | 14 |
| 91 - 120 days | 6 | 2 | 2 |
| 121 - 180 days | 6 | 3 | 5 |
| 6 Months or More | 5 | 0 | 1 |
| Total | 100% | 100% | 100% |
| Average Booking in Days | 55 | 36 | 50 |

* 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 (2007 - cont.)

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 8,200) | All Visitors from Japan (n = 1,751) | Leisure Visitors from Japan (n = 731) |
|---|---|---|---|
| **Means of Booking Air Trip** | | | |
| Airlines Directly | 10% | 12% | 19% |
| Corporate Travel Department | 12 | 14 | 2 |
| Personal Computer | 18 | 12 | 17 |
| Travel Agent | 54 | 54 | 52 |
| Travel Club | - | - | 0 |
| Tour Operator | 4 | 6 | 7 |
| Other/Don't Know | 2 | 2 | 3 |
| Total | 100% | 100% | 100% |
| **Main Factor in Selecting Airline** | | | |
| Airfare | 24% | 14% | 22% |
| Schedule | 16 | 8 | 7 |
| Non-Stop Flight | 12 | 6 | 6 |
| Mileage Bonus/Frequent Flyer Program | 11 | 23 | 20 |
| Previous Good Experience | 9 | 5 | 5 |
| Safety Reputation | 7 | 10 | 12 |
| Airline Loyalty | 5 | 18 | 12 |
| In-flight Service | 5 | 6 | 7 |
| Employer policy | 4 | 4 | 1 |
| Other | 6 | 6 | 8 |
| **Airline Seating Area** | | | |
| Economy/Tourist/Coach | 78% | 59% | 78% |
| Executive/Business | 19 | 36 | 21 |
| First Class | 4 | 5 | 1 |
| Total | 100% | 100% | 100% |
| **Use of Package** | | | |
| Yes | 13% | 13% | 24% |
| No | 87 | 87 | 76 |
| Total | 100% | 100% | 100% |
| **Advance Package Booking** | | | |
| 7 days or less | 5% | 3% | 4% |
| 8 - 30 days | 32 | 33 | 34 |
| 31 - 60 days | 18 | 34 | 36 |
| 61 - 90 days | 11 | 21 | 22 |
| 91 - 120 days | 11 | 2 | 3 |
| 121 - 180 days | 8 | 2 | 1 |
| 6 Months or More | 15 | 5 | 0 |
| Total | 100% | 100% | 100% |

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

## Characteristics of Travelers from Japan to California (2007 - cont.)

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 8,200) | All Visitors from Japan (n = 1,751) | Leisure Visitors from Japan (n = 731) |
|---|---|---|---|
| **Travel Companions**** | | | |
| Business Associates | 12% | 23% | 3% |
| Family/Relatives | 23 | 18 | 35 |
| Friends | 9 | 7 | 12 |
| Spouse | 25 | 20 | 38 |
| Tour Group | 2 | 3 | 3 |
| Traveling Alone | 41 | 39 | 29 |
| **Average Travel Party Size** | 1.5 | 1.6 | 1.8 |
| **Type of Lodging**** | | | |
| Hotel / Motel | 78% | 85% | 74% |
| Private Home | 29 | 18 | 32 |
| Other | 3 | 1 | 1 |
| **Length of Stay** | | | |
| Mean Nights in the U.S. | 19.2 | 10.8 | 10.7 |
| Mean Nights in California | 10.5 | 7.7 | 8.3 |
| % of California Nights | 55% | 71% | 78% |
| **Prior Visitation to the U.S.** | | | |
| First Trip to the U.S. (% Yes) | 21% | 18% | 25% |
| Average Trips to the U.S. in Past Year | 2.0 | 2.5 | 1.7 |
| Average Trips to the U.S. in Past 5 Years | 6.6 | 8.9 | 5.2 |
| **Average Number of States Visited** | 2.0 | 1.6 | 1.5 |
| **Average Number of Destinations Visited** | 2.7 | 2.1 | 2.0 |
| **Places Visited in the U.S.**** | | | |
| Los Angeles | 51% | 51% | 54% |
| San Francisco | 44 | 32 | 34 |
| Las Vegas | 23 | 13 | 18 |
| New York City | 15 | 5 | 3 |
| San Diego | 12 | 13 | 11 |
| San Jose | 8 | 10 | 4 |
| Anaheim | 8 | 11 | 10 |
| Grand Canyon | 4 | 2 | 4 |
| Chicago | 4 | 3 | 1 |
| Yosemite | 3 | 2 | 5 |
| DC Metro Area | 3 | 2 | 1 |
| Seattle | 3 | 5 | 2 |
| Monterey | 3 | 3 | 5 |
| Sacramento | 3 | 1 | 0 |
| Riverside/San Bernardino | 2 | 2 | 1 |
| Oahu/Honolulu | 2 | 4 | 7 |
| Miami | 2 | 0 | 0 |
| Oakland | 2 | 2 | 1 |

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## Characteristics of Travelers from Japan to California
## (2007 - cont.)

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 8,200) | All Visitors from Japan (n = 1,751) | Leisure Visitors from Japan (n = 731) |
|---|---|---|---|
| **Activities Experienced While in the U.S.**** | | | |
| Shopping | 86% | 83% | 91% |
| Dining Out | 86 | 86 | 84 |
| Sightseeing in Cities | 51 | 44 | 57 |
| Historical Places | 37 | 10 | 11 |
| Amusement/Theme Parks | 33 | 22 | 35 |
| Visiting Small Towns | 31 | 27 | 38 |
| National Parks | 30 | 15 | 25 |
| Touring Countryside | 27 | 11 | 17 |
| Cultural Heritage Sites | 24 | 7 | 10 |
| Casinos/Gambling | 23 | 13 | 16 |
| Art Gallery/Museum | 21 | 10 | 13 |
| Guided Tours | 21 | 16 | 26 |
| **Transportation While in the U.S.**** | | | |
| Taxi/Limousine | 41% | 48% | 40% |
| Airlines in U.S. | 38 | 35 | 31 |
| Rented Auto | 36 | 33 | 29 |
| Company or Private Auto | 31 | 35 | 37 |
| City Subway/Tram/Bus | 21 | 22 | 28 |
| Railroad between Cities | 10 | 8 | 8 |
| Bus between Cities | 9 | 7 | 11 |
| Motor Home/Camper | 2 | 1 | 1 |
| **Spending by Category (Per Visitor/Trip)** | | | |
| Lodging | $657 | $647 | $358 |
| Food/Beverages | 399 | 301 | 242 |
| Gifts/Souvenirs | 364 | 301 | 354 |
| Transportation in the U.S. | 336 | 266 | 221 |
| Entertainment | 194 | 125 | 151 |
| Expenses at the Airport | 37 | 42 | 66 |
| Other | 148 | 70 | 77 |
| **Total Spending Per Visitor/Trip** | **$2,135** | **$1,753** | **$1,440** |
| **Visitor Spending in the U.S.** | | | |
| Per Travel Party Per Trip | $3,235 | $2,759 | $2,539 |
| Per Visitor/Trip | 2,135 | 1,753 | 1,440 |
| Per Person Per Day | 111 | 162 | 135 |

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## Characteristics of Travelers from Japan to California
## (2007 - cont.)

| Trip & Traveler Characteristics | All Overseas Visitors* (n = 8,200) | All Visitors from Japan (n = 1,751) | Leisure Visitors from Japan (n = 731) |
|---|---|---|---|
| **Payment Method for Trip Expenses** | | | |
| Credit Cards | 54% | 61% | 52% |
| Cash | 39 | 33 | 43 |
| Debit Cards | 5 | 3 | 2 |
| Travelers Checks | 3 | 4 | 4 |
| Total | 100% | 100% | 100% |
| **Age** | | | |
| Average Age - Males | 43.3 | 44.8 | 45.5 |
| Average Age - Females | 39.6 | 41.2 | 41.9 |
| **Occupation** | | | |
| Manager/Executive | 37% | 40% | 23% |
| Professional/Technical | 34 | 30 | 28 |
| Student | 7 | 4 | 6 |
| Clerical/Sales | 7 | 10 | 12 |
| Retired | 6 | 3 | 6 |
| Other | 10 | 14 | 25 |
| Total | 100% | 100% | 100% |
| **Annual Household Income** | | | |
| Under $20,000 | 8% | 4% | 5% |
| $20,000 - $39,999 | 11 | 7 | 12 |
| $40,000 - $59,999 | 13 | 14 | 20 |
| $60,000 - $79,999 | 13 | 15 | 17 |
| $80,000 - $99,999 | 12 | 15 | 11 |
| $100,000 - $119,999 | 10 | 14 | 10 |
| $120,000 - $139,999 | 7 | 8 | 6 |
| $140,000 - $159,999 | 5 | 8 | 4 |
| $160,000 - $179,999 | 3 | 4 | 4 |
| $180,000 - $199,999 | 3 | 2 | 1 |
| $200,000 and over | 16 | 11 | 11 |
| Total | 100% | 100% | 100% |
| Average Annual Income | $101,300 | $103,200 | $91,100 |

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