

CHARACTERISTICS OF TRAVELERS FROM CHINA TO CALIFORNIA - 2015

In 2015 visitation from China to California rose to a record high of approximately 1,162,000, making China California's largest overseas market.* Collectively, visitors from China spent approximately \$2.55 billion in California.

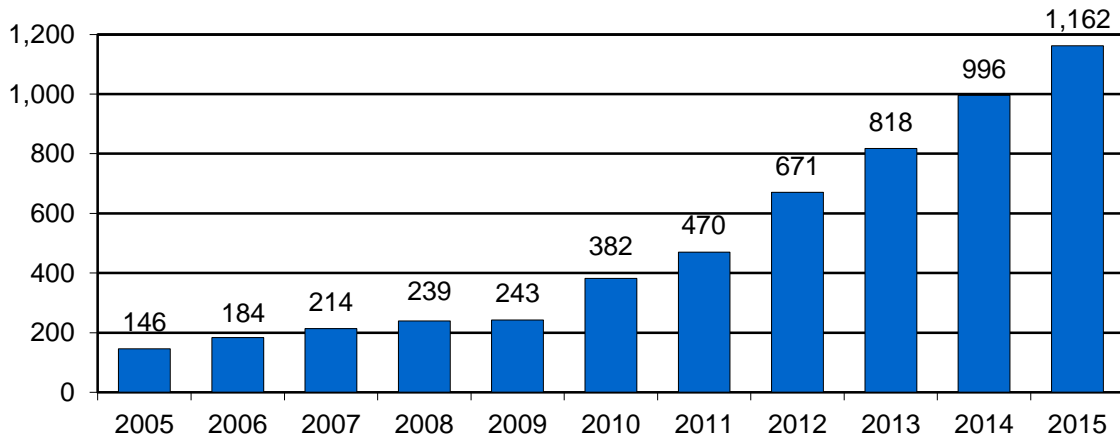
Visitors to California from China during 2015 reported spending \$127 per day during a 17.2 night average stay or approximately \$2,191 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors from China

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	270,272	54.0%	146,000
2006	320,450	57.4%	184,000
2007	397,405	53.8%	214,000
2008	492,958	48.5%	239,000
2009	524,817	46.3%	243,000
2010	801,738	47.6%	382,000
2011	1,089,405	43.1%	470,000
2012	1,474,408	45.5%	671,000
2013	1,806,553	45.3%	818,000
2014 ³	2,188,387	45.5%	996,000
2015 ³	2,631,820	44.2%	1,162,000

- 1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.
- 2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."
- 3) Sourced from Tourism Economics.

Number of Visitors from China to California, 2005-2015 (in 000s)



Source: U.S. Dept. of Commerce, National Travel and Tourism Office.
Revised by Tourism Economics for Visit California (October, 2015).

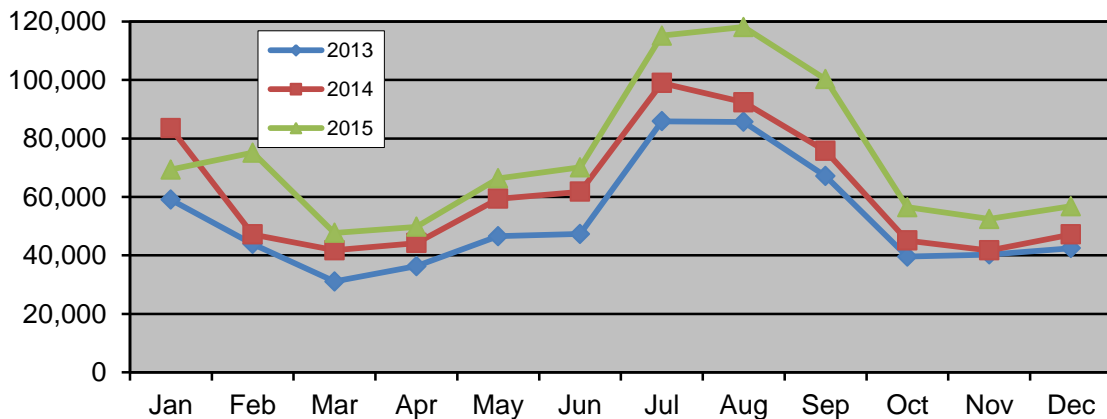
* Please note that residents of Hong Kong are not included in the report on visitors from China.

The volume of visitors to the U.S. and California from the People’s Republic of China was less than 25,000 in 1988. By the year 2000 there were nearly one-quarter million Chinese visitors to the U.S. and about 60% of these visitors were coming to California. However, in the post 9-11 period Chinese visitation dropped to a low of 76,000 visitors to California in 2003. Chinese visitor volumes to California have since continued to grow exponentially to a high of 1,162,000 visitors in 2015 (with a California market share of 44.2%).

Chinese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from China to California were higher for almost all months of 2015 compared with the previous two years. In 2015 Chinese resident arrivals at California ports-of-entry peaked in July and August and were lowest in March and April.

**Residents of China
Monthly Port of Entry Arrivals to CA
2013-2015**



Sources: U.S. Department of Homeland Security, I-94 International Arrival Records, CIC Research, Inc., Visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

Comparisons with Overseas Visitors

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

- Have a decidedly shorter trip planning and advance airline booking horizon
- Select an airline based on non-stop flights
- Make use of an inclusive travel package including attractions/events/entertainment, meals, guided tours, or a tour guide for the entire trip
- Be on their first trip to the U.S.
- Visit Los Angeles as part of their trip
- Experience fine dining and visit art galleries/museums while in the U.S.
- Spend more while in the U.S. and California
- Spend a higher percentage of their travel dollar on gifts and souvenirs in the U.S.
- Use a credit card to make purchases
- Have a lower average annual household income

Conversely, visitors from China are less likely to:

- Travel to California for vacation/holiday purposes
- Use an airline as a trip planning source
- Book their air trip with the airlines directly or with a travel agency office
- Use a taxicab/limousine for transportation in the US

Characteristics of Travelers from China to California – 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from China (n = 660)	Leisure Visitors from China (n = 400)
Primary Purpose of Trip			
Vacation/Holidays	54%	50%	77%
Visit Friends/Relatives	18%	15%	23%
Business	13%	14%	-
Convention/Conference	9%	10%	-
Other Purpose	6%	12%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	59%	82%
Visit Friends/Relatives	34%	33%	40%
Business	17%	19%	2%
Convention/Conference	12%	13%	1%
Sources Used to Plan Trip**			
Airline	43%	32%	30%
Online Travel Agency	34%	29%	31%
Personal Recommendation	29%	31%	37%
Travel Agency Office	23%	16%	17%
Travel Guide	15%	18%	21%
Corporate Travel Department	12%	14%	8%
Tour Operator/Travel Club	9%	8%	8%
National/State/City Travel Office	7%	6%	4%
Advance Planning for Trip			
7 days or less	5%	6%	4%
8 - 30 days	24%	36%	28%
31 - 60 days	19%	25%	29%
61 - 90 days	15%	16%	17%
More than 3 Months	38%	19%	22%
Total	100%	100%	100%
Average Planning Time in Days	108 days	69 days	78 days
Advance Airline Reservations			
7 days or less	8%	11%	8%
8 - 30 days	33%	49%	45%
31 - 60 days	20%	23%	26%
61 - 90 days	13%	10%	13%
91 - 120 days	9%	4%	5%
121 - 180 days	10%	2%	2%
6 Months or More	8%	1%	1%
Total	100%	100%	100%
Average Booking in Days	76 days	43 days	50 days

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

** Multiple response question. The column may sum to more than 100%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from China to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from China (n = 660)	Leisure Visitors from China (n = 400)
Means of Booking Air Trip**			
Airlines Directly	31%	20%	20%
Internet Booking Service	29%	37%	40%
Travel Agency Office	26%	15%	17%
Corporate Travel Department	12%	17%	8%
Tour Operator/Travel Club	9%	16%	18%
Other	1%	2%	2%
Main Factor in Selecting Airline			
Airfare	29%	27%	30%
Non-Stop Flights	17%	28%	26%
Convenient Schedule	15%	11%	11%
Previous Good Experience	9%	5%	5%
Mileage Bonus/Frequent Flyer Program	8%	5%	5%
Safety Reputation	9%	14%	11%
Loyalty to Carrier	3%	1%	2%
In-flight Service Reputation	3%	1%	2%
Employer policy	3%	3%	2%
On-time Reputation	2%	2%	2%
Other	3%	3%	5%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	89%	90%
Premium Economy	10%	3%	2%
Executive/Business	8%	7%	7%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	32%	39%
No	86%	68%	61%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	20%	27%
Meals	6%	16%	21%
Bus/Coach	6%	12%	16%
Guided Tours	6%	16%	21%
Rental Car	4%	12%	14%
Tour Guide for Entire Trip	5%	16%	22%
Airfare and Accommodation Only	3%	5%	4%
Cruise	2%	4%	4%
Recreation	1%	4%	5%

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

** Multiple response question. Travel package must include airfare and accommodation and may include others.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from China to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from China (n = 660)	Leisure Visitors from China (n = 400)
Travel Companions**			
Traveling Alone	59%	49%	37%
Spouse/Partner	22%	23%	32%
Family/Relatives	15%	23%	35%
Friends	6%	8%	8%
Business Associates	4%	7%	<1%
Tour Group	1%	2%	3%
Average Travel Party Size	1.7	2.1	2.4
Median Travel Party Size	1.0	2.0	2.0
Type of Lodging**			
Hotel / Motel	73%	69%	68%
Private Home	32%	31%	33%
Other	6%	7%	7%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	28.3 nights	21.3 nights
Mean Nights in California	12.6 nights	17.2 nights	12.5 nights
% of California Nights	52%	61%	59%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	47%	53%
Average Trips to the U.S. in Past Year	1.7 trips	1.5 trips	1.5 trips
Average Number of States Visited	2.0 states	2.2 states	2.4 states
Average Number of Destinations Visited	3.1 dest.	3.0 dest.	3.5 dest.
Places Visited in the U.S.**			
Los Angeles	60%	72%	83%
San Francisco	45%	45%	52%
Las Vegas	30%	29%	38%
New York City	15%	19%	21%
San Diego	14%	10%	12%
Anaheim-Santa Ana	8%	5%	5%
Flagstaff-Grand Canyon-Sedona	7%	2%	4%
San Jose	6%	6%	1%
DC Metro Area	5%	10%	13%
Monterey-Salinas	5%	4%	7%
Santa Barbara	4%	2%	3%
Riverside/San Bernardino	4%	1%	<1%
Oahu	3%	3%	5%
Seattle	3%	4%	4%
Chicago	3%	3%	3%
Miami	2%	2%	3%
Sacramento	2%	1%	1%

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

** Multiple response question. The column may sum to more than 100%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from China to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from China (n = 660)	Leisure Visitors from China (n = 400)
Activities Experienced While in the U.S.**			
Shopping	87%	87%	87%
Sightseeing	83%	83%	87%
National Parks/Monuments	51%	48%	61%
Small Towns/Countryside	42%	48%	60%
Experience Fine Dining	40%	55%	61%
Amusement/Theme Parks	39%	46%	55%
Historical Locations	34%	29%	32%
Guided Tours	31%	25%	31%
Art Gallery/Museums	33%	44%	51%
Casino/Gamble	24%	19%	24%
Cultural/Ethnic Heritage Sites	20%	24%	31%
Concert/Play/Musical	20%	13%	14%
Transportation While in the U.S.**			
Rented Auto	44%	47%	48%
Air Travel between U.S. Cities	44%	50%	53%
Auto, Private or Company	37%	38%	39%
City Subway/Tram/Bus	31%	24%	24%
Taxicab/Limousine	31%	18%	16%
Bus between Cities	19%	14%	15%
Ferry/River Taxi/Srt. Scenic Cruise	10%	5%	5%
Railroad between Cities	7%	5%	4%
Rented Bicycle/Motorcycle/Moped	5%	2%	1%
Cruise Ship/River Boat 1+ Nights	4%	2%	2%
Motor Home/Camper	2%	<1%	<1%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,899	\$3,875
Per Visitor Per Day (CA)	\$157	\$127	\$167
Per Visitor/Trip (California)	\$1,979	\$2,191	\$2,090
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	30.5%	22.7%
Air Transportation in the U.S.	5.9%	7.4%	10.3%
Entertainment	12.9%	9.8%	10.7%
Food/Beverages	19.9%	12.7%	13.8%
Gifts/Souvenirs	19.2%	27.0%	30.3%
Ground Transportation in the U.S.	6.3%	7.4%	7.7%
Other	4.2%	4.8%	4.5%

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

** Multiple response question. The column may sum to more than 100%.

*** Spending estimates were based on the SIAT data and revised by Tourism Economics for Visit California.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers." CIC Research, Inc. and Tourism Economics

**Characteristics of Travelers from China to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from China (n = 660)	Leisure Visitors from China (n = 400)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	54%	53%
Cash from Home/Travelers Checks	27%	23%	25%
Cash Adv./Withdrawal Using Credit Card	18%	16%	15%
Cash Adv./Withdrawal Using Debit Card	6%	2%	3%
Purchases Using Debit Card	6%	4%	4%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	38 years	41 years
Average Age - Females	38 years	34 years	36 years
Occupation			
Mgmt., Business, Science & Arts	46%	45%	44%
Service Occupations	11%	9%	9%
Student	12%	13%	10%
Sales and Office	11%	16%	14%
Retired	8%	5%	6%
Homemaker	4%	4%	6%
Prod., Trans., & Material Moving	3%	4%	5%
Military/Government	3%	2%	1%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	1%	1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	20%	17%
\$20,000 - \$39,999	15%	24%	25%
\$40,000 - \$59,999	15%	16%	17%
\$60,000 - \$79,999	14%	11%	12%
\$80,000 - \$99,999	10%	7%	6%
\$100,000 - \$119,999	10%	6%	3%
\$120,000 - \$139,999	4%	3%	4%
\$140,000 - \$159,999	4%	5%	6%
\$160,000 - \$179,999	3%	2%	3%
\$180,000 - \$199,999	1%	<1%	-
\$200,000 and over	10%	7%	7%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$75,030	\$80,102

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

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."