

CHARACTERISTICS OF TRAVELERS FROM JAPAN TO CALIFORNIA - 2014

Japan was California's fourth largest overseas market with approximately 575,000 visitors to California in 2014. Collectively visitors from Japan spent approximately \$1.17 billion in California.

Japanese visitors to California during 2014 reported spending \$283 per day during a 7.2 night average stay or approximately \$2,041 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

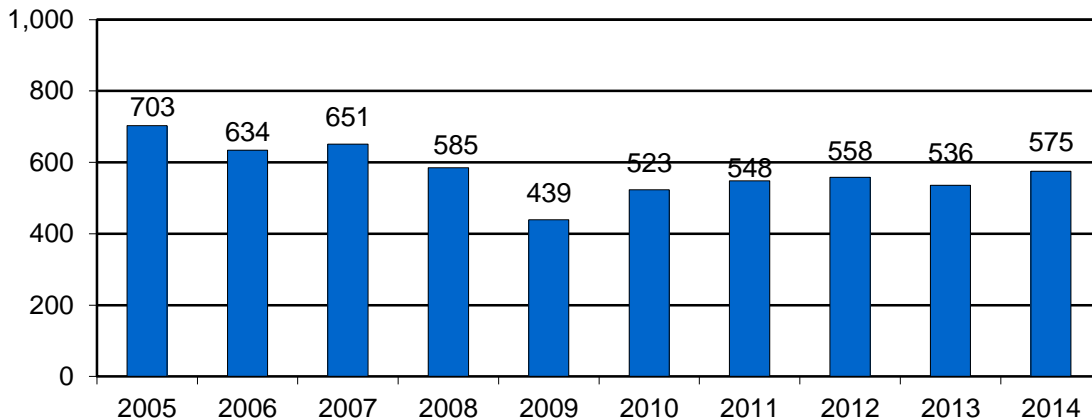
Visitors From Japan

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2004	3,747,620	17.6%	660,000
2005	3,883,906	18.1%	703,000
2006	3,672,584	17.3%	634,000
2007	3,531,489	18.4%	651,000
2008	3,249,578	18.0%	585,000
2009	2,918,268	15.0%	439,000
2010	3,386,076	15.4%	523,000
2011	3,249,569	16.9%	548,000
2012	3,698,073	15.1%	558,000
2013	3,730,287	14.4%	536,000
2014	3,579,363	16.1%	575,000

1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.

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

Number of Visitors from Japan to California, 2005-2014 (in 000s)



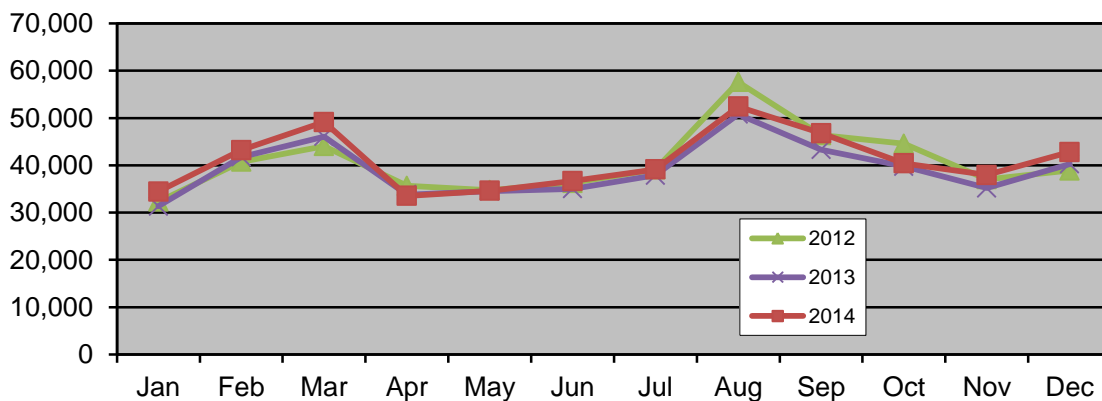
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office, Revised by Tourism Economics for Visit California (October, 2015).

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 439,000 visitors, and the lowest market share in 10 years (15.0%). The number of overseas visitors from Japan to California was 575,000 in 2014 with a market share of 16.1%. With this, Japan has dropped in rank to California’s fourth largest overseas market.

Japanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Japan to California were similar in the months of 2014 as in 2013 and 2012. In general, Japanese resident arrivals at California ports-of-entry peaked in August. The lowest volumes were recorded in January and April.

**Residents of Japan
Monthly Port of Entry Arrivals to California
(2012-2014)**



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 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/professional purposes
- Make use of a travel agency office to plan their trip
- Have decidedly lower trip planning and advance airline booking horizons
- Select an airline due to the Mileage Bonus/Frequent Flyer Program
- Travel in executive or business class
- Travel with business associates
- Have a shorter stay in the U.S. and California
- Spend a greater proportion of their time in California
- Stay in a hotel/motel
- Visit fewer states
- Use a taxicab/limousine for transportation while in the US
- Spend per visitor per day and per visitor per trip in California
- Spend a higher proportion of their money on accommodation and a lower proportion on air transportation in the U.S., entertainment, as well as gifts/souvenirs
- Make use of a credit card to pay for trip expenses
- Have a higher average age for both males and females
- Work in the production, transportation & materials moving industry
- Have a higher average annual household income

Conversely, visitors from Japan are less likely to:

- Travel to California for vacation/holiday purposes
- Use an online travel agency, personal recommendation, tour operator/travel club to plan their trip
- Select an airline due to the airfare
- Travel in economy/tourist/coach class
- Travel with a spouse/partner
- Stay in a private home
- Be on their first trip to the U.S.
- Visit Los Angeles, Las Vegas, San Francisco, and New York City as part of their trip
- Experience the leisure-oriented activities
- Rent an auto, make use of air travel between U.S. cities, or use a private or company auto for transportation while in the US
- Spend per visitor while in the U.S.
- Work in management/business/science & arts

Characteristics of Travelers from Japan to California – 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Japan (n = 1,299)	Leisure Visitors from Japan (n = 560)
Primary Purpose of Trip			
Vacation/Holidays	54%	33%	67%
Visit Friends/Relatives	18%	16%	33%
Business	13%	33%	-
Convention/Conference	8%	13%	-
Other Purpose	7%	6%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	41%	77%
Visit Friends/Relatives	34%	28%	43%
Business	18%	38%	2%
Convention/Conference	12%	17%	<1%
Sources Used to Plan Trip**			
Airline	43%	39%	46%
Online Travel Agency	32%	18%	23%
Travel Agency Office	25%	37%	27%
Personal Recommendation	29%	16%	25%
Travel Guide	15%	15%	21%
Corporate Travel Department	12%	8%	6%
Tour Operator/Travel Club	10%	4%	5%
National/State/City Travel Office	8%	6%	6%
Advance Planning for Trip			
7 days or less	5%	5%	1%
8 - 30 days	25%	36%	20%
31 - 60 days	19%	26%	31%
61 - 90 days	15%	14%	20%
More than 3 Months	36%	20%	28%
Total	100%	100%	100%
Average Planning Time in Days	106 days	72 days	91 days
Advance Airline Reservations			
7 days or less	9%	12%	5%
8 - 30 days	35%	44%	32%
31 - 60 days	19%	22%	31%
61 - 90 days	12%	9%	15%
91 - 120 days	8%	6%	8%
121 - 180 days	10%	5%	5%
6 Months or More	8%	2%	4%
Total	100%	100%	100%
Average Booking in Days	74 days	51 days	67 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%.

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

**Characteristics of Travelers from Japan to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Japan (n = 1,299)	Leisure Visitors from Japan (n = 560)
Means of Booking Air Trip**			
Travel Agency Office	29%	36%	33%
Airlines Directly	29%	26%	36%
Internet Booking Service	27%	19%	27%
Corporate Travel Department	12%	16%	2%
Tour Operator/Travel Club	10%	4%	4%
Other	1%	2%	1%
Main Factor in Selecting Airline			
Airfare	31%	14%	17%
Non-Stop Flights	19%	18%	21%
Convenient Schedule	14%	10%	10%
Previous Good Experience	8%	11%	7%
Mileage Bonus/Frequent Flyer Program	6%	18%	17%
Safety Reputation	6%	10%	13%
Loyalty to Carrier	3%	3%	2%
In-flight Service Reputation	3%	7%	6%
Employer policy	2%	3%	1%
On-time Reputation	2%	3%	3%
Other	5%	4%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	60%	71%
Premium Economy	9%	12%	10%
Executive/Business	8%	27%	19%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	21%	28%
No	85%	79%	72%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	9%	11%
Bus/Coach	6%	10%	12%
Guided Tours	6%	9%	10%
Meals	6%	7%	10%
Rental Car	5%	1%	1%
Tour Guide for Entire Trip	4%	5%	7%
Airfare and Accommodation Only	2%	7%	9%
Cruise	2%	2%	2%
Recreation	2%	2%	2%

* 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 Japan to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Japan (n = 1,299)	Leisure Visitors from Japan (n = 560)
Travel Companions**			
Traveling Alone	59%	64%	48%
Spouse/Partner	22%	12%	26%
Family/Relatives	15%	11%	22%
Friends	6%	5%	11%
Business Associates	3%	11%	1%
Tour Group	1%	1%	1%
Average Travel Party Size	1.7	1.6	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	85%	74%
Private Home	30%	19%	33%
Other	6%	2%	4%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	9.3 nights	9.1 nights
Mean Nights in California	12.2 nights	7.2 nights	6.9 nights
% of California Nights	52%	77%	76%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	13%	15%
Average Trips to the U.S. in Past Year	1.7 trips	2.5 trips	1.7 trips
Average Number of States Visited	2.1 states	1.5 states	1.5 states
Average Number of Destinations Visited	3.1 dest.	2.2 dest.	2.4 dest.
Places Visited in the U.S.**			
Los Angeles	62%	47%	55%
San Francisco	44%	26%	23%
Las Vegas	29%	7%	13%
New York City	16%	5%	3%
San Diego	14%	15%	17%
Anaheim-Santa Ana	8%	14%	20%
Flagstaff-Grand Canyon-Sedona	7%	3%	4%
San Jose	6%	12%	4%
Monterey-Salinas	5%	2%	2%
DC Metro Area	4%	1%	1%
Riverside/San Bernardino	4%	2%	2%
Santa Barbara	4%	2%	2%
Chicago	3%	2%	1%
Oahu	3%	4%	7%
Seattle	3%	3%	5%
Sacramento	3%	3%	2%
Miami	3%	<1%	<1%

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** Multiple response question. Table may add to more than 100%.

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

**Characteristics of Travelers from Japan to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Japan (n = 1,299)	Leisure Visitors from Japan (n = 560)
Activities Experienced While in the U.S.**			
Shopping	89%	82%	85%
Sightseeing	83%	77%	87%
National Parks/Monuments	52%	22%	25%
Small Towns/Countryside	44%	16%	19%
Experience Fine Dining	43%	41%	35%
Amusement/Theme Parks	40%	25%	32%
Historical Locations	35%	16%	17%
Guided Tours	33%	19%	23%
Art Gallery/Museums	31%	17%	16%
Casino/Gamble	24%	8%	11%
Concert/Play/Musical	21%	13%	11%
Cultural/Ethnic Heritage Sites	20%	8%	7%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	31%	32%
Rented Auto	44%	33%	26%
Auto, Private or Company	38%	28%	34%
City Subway/Tram/Bus	31%	24%	29%
Taxicab/Limousine	31%	42%	31%
Bus between Cities	19%	17%	23%
Ferry/River Taxi/Srt. Scenic Cruise	10%	5%	7%
Railroad between Cities	7%	9%	10%
Rented Bicycle/Motorcycle/Moped	5%	6%	5%
Cruise Ship/River Boat 1+ Nights	4%	<1%	1%
Motor Home/Camper	2%	<1%	1%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$2,636	\$2,824
Per Visitor Per Day (CA)	\$153	\$283	\$310
Per Visitor/Trip (California)	\$1,872	\$2,041	\$2,141
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	47.5%	46.9%
Air Transportation in the U.S.	6.6%	1.7%	2.4%
Entertainment	12.5%	8.1%	9.8%
Food/Beverages	18.1%	17.3%	14.1%
Gifts/Souvenirs	21.1%	14.9%	19.1%
Ground Transportation in the U.S.	6.2%	6.4%	3.6%
Other	4.9%	3.9%	4.0%

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** Multiple response question. Table may add 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 Japan to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Japan (n = 1,299)	Leisure Visitors from Japan (n = 560)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	52%	49%
Cash from Home/Travelers Checks	27%	30%	40%
Cash Adv./Withdrawal Using Credit Card	18%	16%	9%
Cash Adv./Withdrawal Using Debit Card	6%	1%	1%
Purchases Using Debit Card	6%	1%	2%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	47 years	47 years
Average Age - Females	38 years	44 years	45 years
Occupation			
Mgmt., Business, Science & Arts	44%	36%	24%
Service Occupations	11%	10%	15%
Student	11%	8%	10%
Sales and Office	11%	15%	14%
Retired	8%	6%	10%
Homemaker	4%	10%	18%
Prod., Trans., & Material Moving	4%	13%	5%
Nat. Res., Const., & Maintenance	3%	1%	2%
Military/Government	2%	1%	1%
Other	2%	2%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	5%	7%
\$20,000 - \$39,999	13%	9%	16%
\$40,000 - \$59,999	14%	11%	16%
\$60,000 - \$79,999	11%	15%	15%
\$80,000 - \$99,999	10%	15%	14%
\$100,000 - \$119,999	9%	11%	9%
\$120,000 - \$139,999	6%	7%	2%
\$140,000 - \$159,999	4%	6%	5%
\$160,000 - \$179,999	3%	4%	4%
\$180,000 - \$199,999	2%	3%	3%
\$200,000 and over	11%	15%	10%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$129,073	\$102,269

* 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."