

CHARACTERISTICS OF TRAVELERS FROM SOUTH KOREA TO CALIFORNIA – 2015

South Korea was California’s sixth largest overseas market with approximately 438,000 visitors to California in 2015, up 10.3% from 397,000 in 2014. Collectively visitors from South Korea spent approximately \$957 million in California in 2015, down slightly from \$965 in 2014.

South Korean visitors to California during 2015 reported spending \$195 per day during an 11.2 night average stay or approximately \$2,185 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 South Korea

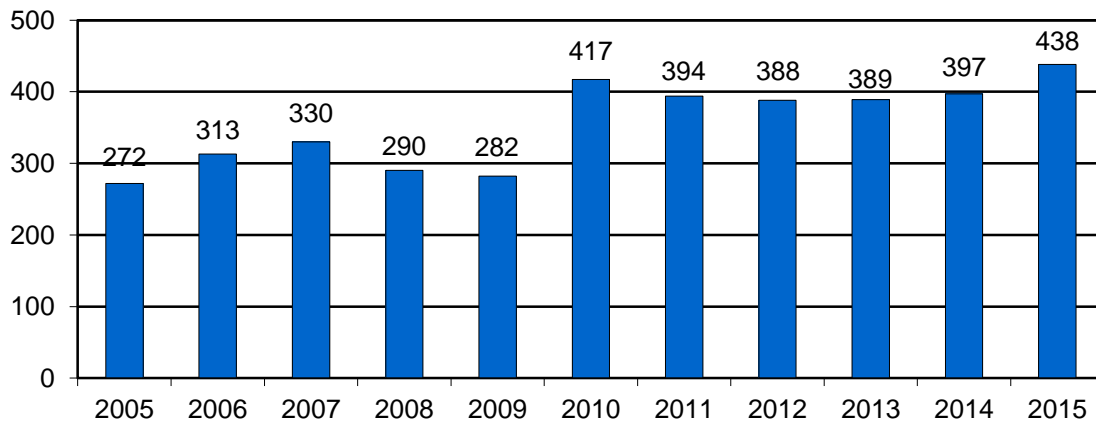
Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	705,093	38.6%	272,000
2006	757,721	41.3%	313,000
2007	806,175	40.9%	330,000
2008	759,394	38.2%	290,000
2009	743,846	37.9%	282,000
2010	1,107,518	37.7%	417,000
2011	1,145,216	34.4%	394,000
2012	1,251,432	31.0%	388,000
2013	1,359,924	28.6%	389,000
2014 ³	1,449,538	27.4%	397,000
2015 ³	1,787,210	24.5%	438,000

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 South Korea to CA, 2005-2015 (in 000s)



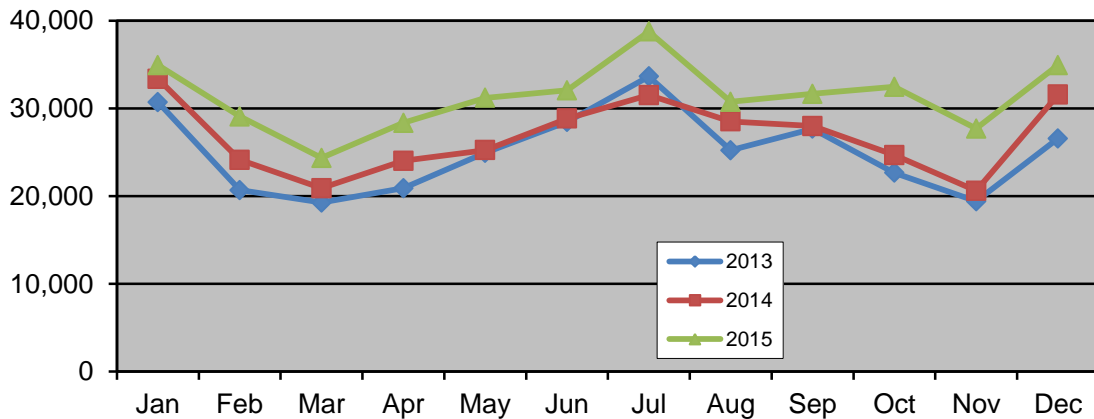
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,
Revised by Tourism Economics for Visit California (October, 2015).

Visitor volume from South Korea to California has reached a new peak in 2015 with 438,000 visitors. The previous peak was in 2010 at 417,000 visitors to California from South Korea. California's market share of South Korean visitors to the U.S. was at its highest in 2000 at 63% however since then the percentage of South Korean visitors who visit California has not risen above 49%. Indeed, California's market share of South Korean visitors to the U.S. has declined consistently since 2006 to 24.5% in 2015.

South Korean Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from South Korea to California were higher during 2015 compared with 2014 and 2013. In all years, South Korean resident arrivals at California ports-of-entry peaked in January, July, and December. The lowest volumes in 2015 were recorded in March and November.

**Residents of South Korea
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 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:

- Have shorter trip planning and advance airline booking horizons
- Plan or book their air travel with the assistance of a tour operator or travel club
- Be on their first trip to the U.S.
- Use a bus for transportation between U.S. cities
- Spend more per visitor per trip in California
- Use cash from home or travelers checks for trip expenses
- Have a lower average annual household income

Conversely, visitors from South Korea are less likely to:

- Travel to California for vacation/holiday purposes
- Plan their trip using information from a travel agency office, the airline, or a travel guide
- Experience many of the leisure activities listed
- Use a rented auto or a private/company auto for transportation between U.S. cities
- Use a credit card for trip expenses

Characteristics of Travelers from South Korea to California – 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from South Korea (n = 218)	Leisure Visitors from South Korea (n = 125)
Primary Purpose of Trip			
Vacation/Holidays	54%	47%	71%
Visit Friends/Relatives	18%	19%	29%
Business	13%	13%	-
Convention/Conference	9%	13%	-
Other Purpose	6%	8%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	55%	77%
Visit Friends/Relatives	34%	31%	44%
Business	17%	14%	-
Convention/Conference	12%	18%	1%
Sources Used to Plan Trip**			
Airline	43%	25%	21%
Online Travel Agency	34%	36%	38%
Personal Recommendation	29%	28%	36%
Travel Agency Office	23%	9%	7%
Travel Guide	15%	14%	18%
Corporate Travel Department	12%	12%	4%
Tour Operator/Travel Club	9%	22%	31%
National/State/City Travel Office	7%	4%	5%
Advance Planning for Trip			
7 days or less	5%	4%	1%
8 - 30 days	24%	34%	27%
31 - 60 days	19%	24%	23%
61 - 90 days	15%	14%	15%
More than 3 Months	38%	23%	34%
Total	100%	100%	100%
Average Planning Time in Days	108 days	75 days	94 days
Advance Airline Reservations			
7 days or less	8%	8%	2%
8 - 30 days	33%	45%	39%
31 - 60 days	20%	28%	33%
61 - 90 days	13%	7%	12%
91 - 120 days	9%	5%	6%
121 - 180 days	10%	6%	9%
6 Months or More	8%	1%	<1%
Total	100%	100%	100%
Average Booking in Days	76 days	50 days	60 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 South Korea to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from South Korea (n = 218)	Leisure Visitors from South Korea (n = 125)
Means of Booking Air Trip**			
Airlines Directly	31%	29%	28%
Internet Booking Service	29%	30%	34%
Travel Agency Office	26%	19%	21%
Corporate Travel Department	12%	17%	4%
Tour Operator/Travel Club	9%	17%	20%
Other	1%	<1%	1%
Main Factor in Selecting Airline			
Airfare	29%	18%	25%
Non-Stop Flights	17%	24%	27%
Convenient Schedule	15%	13%	15%
Previous Good Experience	9%	6%	5%
Mileage Bonus/Frequent Flyer Program	8%	14%	10%
Safety Reputation	9%	7%	9%
Loyalty to Carrier	3%	2%	3%
In-flight Service Reputation	3%	2%	1%
Employer policy	3%	10%	<1%
On-time Reputation	2%	4%	4%
Other	3%	<1%	<1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	88%	90%
Premium Economy	10%	5%	5%
Executive/Business	8%	7%	4%
First Class	1%	<1%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	18%	24%
No	86%	82%	76%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	13%	16%
Meals	6%	16%	21%
Bus/Coach	6%	14%	18%
Guided Tours	6%	14%	21%
Rental Car	4%	<1%	<1%
Tour Guide for Entire Trip	5%	12%	15%
Airfare and Accommodation Only	3%	1%	1%
Cruise	2%	6%	9%
Recreation	1%	-	-

* 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 South Korea to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from South Korea (n = 218)	Leisure Visitors from South Korea (n = 125)
Travel Companions**			
Traveling Alone	59%	54%	41%
Spouse/Partner	22%	14%	23%
Family/Relatives	15%	19%	33%
Friends	6%	7%	8%
Business Associates	4%	9%	1%
Tour Group	1%	1%	1%
Average Travel Party Size	1.7	1.8	2.0
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	73%	67%	53%
Private Home	32%	33%	51%
Other	6%	4%	2%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	22.2 nights	21.8 nights
Mean Nights in California	12.6 nights	11.2 nights	11.1 nights
% of California Nights	52%	50%	51%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	39%	45%
Average Trips to the U.S. in Past Year	1.7 trips	1.4 trips	1.3 trips
Average Number of States Visited	2.0 states	1.9 states	2.2 states
Average Number of Destinations Visited	3.1 dest.	2.6 dest.	3.1 dest.
Places Visited in the U.S.**			
Los Angeles	60%	59%	69%
San Francisco	45%	43%	42%
Las Vegas	30%	31%	39%
New York City	15%	18%	25%
San Diego	14%	8%	11%
Anaheim-Santa Ana	8%	5%	7%
Flagstaff-Grand Canyon-Sedona	7%	3%	4%
San Jose	6%	5%	1%
DC Metro Area	5%	7%	10%
Monterey-Salinas	5%	<1%	<1%
Santa Barbara	4%	<1%	<1%
Riverside/San Bernardino	4%	3%	4%
Oahu	3%	8%	14%
Seattle	3%	3%	4%
Chicago	3%	2%	1%
Miami	2%	1%	-
Sacramento	2%	1%	1%

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

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

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from South Korea (n = 218)	Leisure Visitors from South Korea (n = 125)
Activities Experienced While in the U.S.**			
Shopping	87%	72%	72%
Sightseeing	83%	72%	77%
National Parks/Monuments	51%	34%	39%
Small Towns/Countryside	42%	14%	11%
Experience Fine Dining	40%	16%	15%
Amusement/Theme Parks	39%	35%	43%
Historical Locations	34%	15%	14%
Guided Tours	31%	15%	12%
Art Gallery/Museums	33%	28%	31%
Casino/Gamble	24%	23%	25%
Cultural/Ethnic Heritage Sites	20%	19%	18%
Concert/Play/Musical	20%	19%	19%
Transportation While in the U.S.**			
Rented Auto	44%	30%	28%
Air Travel between U.S. Cities	44%	36%	41%
Auto, Private or Company	37%	30%	37%
City Subway/Tram/Bus	31%	27%	30%
Taxicab/Limousine	31%	25%	22%
Bus between Cities	19%	28%	27%
Ferry/River Taxi/Srt. Scenic Cruise	10%	10%	13%
Railroad between Cities	7%	6%	7%
Rented Bicycle/Motorcycle/Moped	5%	3%	3%
Cruise Ship/River Boat 1+ Nights	4%	1%	2%
Motor Home/Camper	2%	-	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,224	\$3,182
Per Visitor Per Day (CA)	\$157	\$195	\$136
Per Visitor/Trip (California)	\$1,979	\$2,185	\$1,505
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	33.9%	16.1%
Air Transportation in the U.S.	5.9%	5.1%	7.0%
Entertainment	12.9%	10.8%	16.1%
Food/Beverages	19.9%	18.0%	22.6%
Gifts/Souvenirs	19.2%	22.6%	26.1%
Ground Transportation in the U.S.	6.3%	4.6%	4.7%
Other	4.2%	5.0%	7.1%

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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 South Korea to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from South Korea (n = 218)	Leisure Visitors from South Korea (n = 125)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	31%	23%
Cash from Home/Travelers Checks	27%	37%	45%
Cash Adv./Withdrawal Using Credit Card	18%	24%	25%
Cash Adv./Withdrawal Using Debit Card	6%	6%	4%
Purchases Using Debit Card	6%	2%	4%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	38 years	40 years
Average Age - Females	38 years	35 years	34 years
Occupation			
Mgmt., Business, Science & Arts	46%	46%	28%
Service Occupations	11%	7%	7%
Student	12%	18%	21%
Sales and Office	11%	11%	15%
Retired	8%	3%	5%
Homemaker	4%	7%	11%
Prod., Trans., & Material Moving	3%	1%	2%
Military/Government	3%	7%	10%
Nat. Res., Const., & Maintenance	3%	-	-
Other	1%	<1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	9%	10%
\$20,000 - \$39,999	15%	22%	25%
\$40,000 - \$59,999	15%	20%	26%
\$60,000 - \$79,999	14%	16%	9%
\$80,000 - \$99,999	10%	12%	13%
\$100,000 - \$119,999	10%	13%	10%
\$120,000 - \$139,999	4%	1%	-
\$140,000 - \$159,999	4%	<1%	<1%
\$160,000 - \$179,999	3%	3%	-
\$180,000 - \$199,999	1%	<1%	-
\$200,000 and over	10%	5%	6%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$70,620	\$64,392

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