

CHARACTERISTICS OF TRAVELERS FROM TAIWAN TO CALIFORNIA - 2013

Taiwan was one of California's smaller overseas markets with approximately 186,000 visitors to California in 2013. Collectively visitors from Taiwan spent approximately \$316 million in California.

Taiwanese visitors to California during 2013 reported spending \$114 per day during a 14.9 night average stay or approximately \$1,701 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

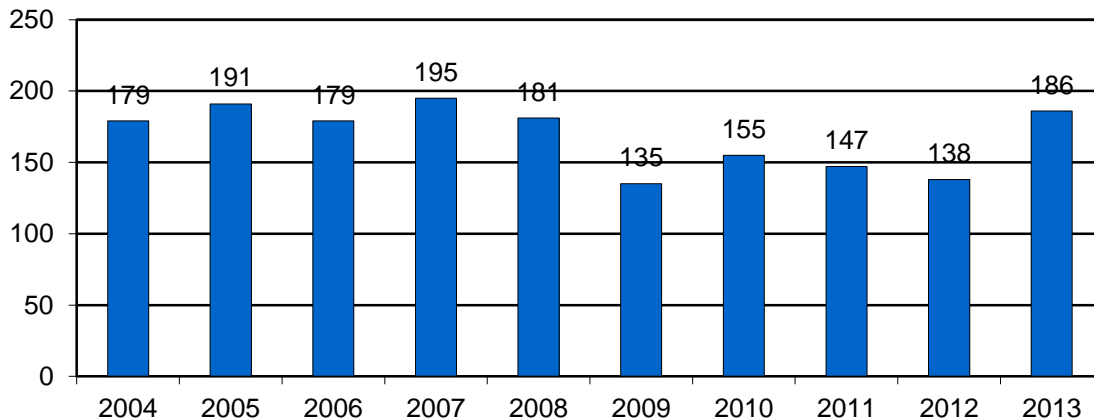
Visitors From Taiwan

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	238,999	62.8%	150,000
2004	297,684	60.1%	179,000
2005	318,886	59.9%	191,000
2006	300,382	59.6%	179,000
2007	311,020	62.7%	195,000
2008	294,893	61.4%	181,000
2009	239,545	56.4%	135,000
2010	291,107	53.2%	155,000
2011	290,313	50.6%	147,000
2012	290,163	47.6%	138,000
2013	384,581	48.4%	186,000

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

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

Number of Visitors from Taiwan to CA, 2004-2013 (in 000s)



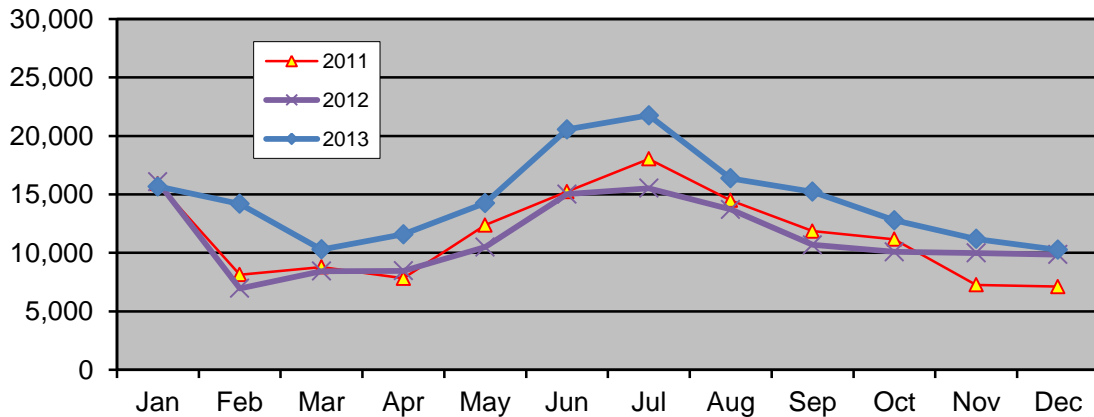
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

The volume of visitors from Taiwan to California rose during the 1990s until its peak of 289,000 in 1997. Visitation pulled back a little from this peak in three subsequent years (1998, 1999, and 2000) and after the 9-11 terrorist attacks, bottomed at 150,000 visitors in 2003. Since then visitor volume has varied from a high of 195,000 visitors in 2007 to a low of 135,000 in 2009. In 2013 visitation had increased to 186,000.

Taiwanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Taiwan to California were slightly higher in 2013 compared with 2012 and 2011. In general, Taiwanese resident arrivals at California ports-of-entry have recorded seasonal peaks in June and in July. The lowest volumes were recorded in March, November, and December.

**Residents of Taiwan
Monthly Port of Entry Arrivals to CA
2011-2013**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

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

- Travel to California to visit friends or relatives or for business purposes
- Have decidedly shorter trip planning and advance airline booking horizons
- Book their air trip through a travel agency office
- Choose an airline based on its safety reputation
- Travel in executive/business class
- Travel with business associates
- Stay in a private home
- Stay in California more of their time in the U.S.
- Use cash from home or travelers checks to pay for trip expenses

Conversely, visitors from Taiwan are less likely to:

- Travel to California for vacation/holiday purposes
- Use an online travel agency to plan their trip
- Book their air trip with an internet booking service
- Mention airfare as the main factor in selecting an airline
- Travel in economy/tourist/coach class
- Stay in hotels/motels
- Visit Las Vegas or New York City while in the U.S.
- Experience many of the leisure activities listed
- Use air travel between U.S. cities or a taxicab/limousine for transportation while in the U.S.
- Spend travel dollars on accommodation

Characteristics of Travelers from Taiwan to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Taiwan (n = 426)	Leisure Visitors from Taiwan (n = 226)
Primary Purpose of Trip			
Vacation/Holidays	52%	28%	49%
Visit Friends/Relatives	17%	29%	51%
Business	15%	26%	-
Convention/Conference	9%	11%	-
Other Purpose	8%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	45%	65%
Visit Friends/Relatives	32%	50%	66%
Business	20%	33%	4%
Convention/Conference	12%	15%	1%
Sources Used to Plan Trip**			
Airline	43%	36%	41%
Online Travel Agency	31%	20%	19%
Travel Agency Office	26%	24%	25%
Personal Recommendation	26%	28%	36%
Travel Guide	15%	12%	15%
Corporate Travel Department	14%	19%	6%
Tour Operator/Travel Club	9%	3%	4%
National/State/City Travel Office	8%	3%	5%
Advance Planning for Trip			
7 days or less	5%	8%	5%
8 - 30 days	27%	49%	42%
31 - 60 days	17%	21%	25%
61 - 90 days	14%	7%	9%
More than 3 Months	36%	14%	19%
Total	100%	100%	100%
Average Planning Time in Days	105 days	54 days	64 days
Advance Airline Reservations			
7 days or less	10%	16%	11%
8 - 30 days	35%	57%	55%
31 - 60 days	17%	13%	15%
61 - 90 days	13%	8%	10%
91 - 120 days	8%	3%	5%
121 - 180 days	9%	2%	4%
6 Months or More	7%	-	-
Total	100%	100%	100%
Average Booking in Days	72 days	35 days	42 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 Taiwan to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Taiwan (n = 426)	Leisure Visitors from Taiwan (n = 226)
Means of Booking Air Trip**			
Travel Agency Office	31%	52%	51%
Airlines Directly	28%	21%	27%
Internet Booking Service	24%	10%	12%
Corporate Travel Department	15%	19%	10%
Tour Operator/Travel Club	9%	9%	11%
Other	2%	<1%	<1%
Main Factor in Selecting Airline			
Airfare	29%	19%	21%
Non-Stop Flights	17%	25%	25%
Convenient Schedule	15%	10%	6%
Mileage Bonus/Frequent Flyer Program	9%	6%	6%
Previous Good Experience	9%	10%	9%
Safety Reputation	6%	17%	16%
Loyalty to Carrier	4%	2%	3%
Employer policy	3%	2%	1%
In-flight Service Reputation	3%	4%	7%
On-time Reputation	2%	2%	4%
Other	4%	2%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	62%	73%
Executive/Business	10%	22%	14%
Premium Economy	10%	14%	10%
First Class	1%	2%	3%
Total	100%	100%	100%
Use of Package			
Yes	15%	18%	17%
No	85%	82%	83%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	5%	4%
Attractions/Events/Entertainment	7%	8%	12%
Bus/Coach	7%	6%	8%
Cruise	2%	1%	1%
Guided Tours	6%	4%	5%
Meals	6%	8%	11%
Recreation	1%	2%	3%
Rental Car	5%	6%	5%
Tour Guide for Entire Trip	4%	3%	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 Taiwan to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Taiwan (n = 426)	Leisure Visitors from Taiwan (n = 226)
Travel Companions**			
Traveling Alone	61%	56%	51%
Spouse/Partner	21%	16%	23%
Family/Relatives	13%	17%	28%
Friends	6%	7%	10%
Business Associates	4%	12%	1%
Tour Group	1%	1%	1%
Average Travel Party Size	1.6	1.7	1.9
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	64%	54%
Private Home	27%	42%	56%
Other	6%	2%	1%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	19.8 nights	19.2 nights
Mean Nights in California	12.2 nights	14.9 nights	16.7 nights
% of California Nights	54%	75%	87%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	21%	25%
Average Trips to the U.S. in Past Year	1.7 trips	2.0 trips	1.8 trips
Average Number of States Visited	2.0 states	1.5 states	1.3 states
Average Number of Destinations Visited	3.0 dest.	2.0 dest.	1.9 dest.
Places Visited in the U.S.**			
Los Angeles	59%	57%	63%
San Francisco	47%	41%	50%
Las Vegas	30%	15%	20%
New York City	16%	6%	3%
San Diego	13%	8%	7%
Anaheim-Santa Ana	8%	4%	4%
Flagstaff-Grand Canyon-Sedona	7%	1%	2%
San Jose	6%	11%	5%
DC Metro Area	4%	1%	1%
Monterey-Salinas	4%	1%	2%
Oahu	4%	1%	1%
Santa Barbara	3%	1%	1%
Riverside/San Bernardino	3%	1%	<1%
Chicago	3%	5%	3%
Seattle	3%	1%	1%
Sacramento	3%	2%	1%
Miami	3%	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 Taiwan to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Taiwan (n = 426)	Leisure Visitors from Taiwan (n = 226)
Activities Experienced While in the U.S.**			
Shopping	88%	87%	85%
Sightseeing	84%	82%	90%
National Parks/Monuments	49%	25%	31%
Experience Fine Dining	43%	44%	48%
Small Towns/Countryside	41%	23%	26%
Amusement/Theme Parks	38%	29%	36%
Historical Locations	37%	18%	21%
Guided Tours	33%	10%	12%
Art Gallery/Museums	30%	23%	25%
Casino/Gamble	25%	15%	16%
Cultural/Ethnic Heritage Sites	21%	13%	17%
Concert/Play/Musical	20%	9%	10%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	31%	24%
Rented Auto	43%	42%	32%
Auto, Private or Company	37%	42%	48%
City Subway/Tram/Bus	33%	26%	30%
Taxicab/Limousine	33%	16%	16%
Bus between Cities	18%	14%	17%
Ferry/River Taxi/Srt. Scenic Cruise	12%	5%	6%
Railroad between Cities	8%	4%	6%
Rented Bicycle/Motorcycle/Moped	5%	4%	6%
Cruise Ship/River Boat 1+ Nights	4%	2%	3%
Motor Home/Camper	2%	<1%	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$3,531	\$2,079
Per Visitor Per Day (CA)	\$159	\$114	\$108
Per Visitor/Trip (California)	\$1,940	\$1,701	\$1,809
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	23.6%	13.2%
Air Transportation in the U.S.	6.9%	9.3%	8.1%
Entertainment	12.2%	12.8%	17.8%
Food/Beverages	17.8%	16.0%	17.0%
Gifts/Souvenirs	21.9%	26.0%	31.1%
Ground Transportation in the U.S.	5.6%	7.5%	6.2%
Other	6.3%	4.8%	6.6%

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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 Taiwan to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Taiwan (n = 426)	Leisure Visitors from Taiwan (n = 226)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	44%	36%
Cash from Home/Travelers Checks	26%	43%	54%
Cash Adv./Withdrawal Using Credit Card	18%	10%	7%
Cash Adv./Withdrawal Using Debit Card	7%	1%	1%
Purchases Using Debit Card	6%	3%	2%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	42 years	43 years
Average Age - Females	39 years	37 years	37 years
Occupation			
Mgmt., Business, Science, & Arts	44%	37%	27%
Service Occupations	11%	16%	22%
Student	11%	10%	11%
Sales and Office	10%	15%	10%
Retired	8%	5%	9%
Homemaker	5%	4%	7%
Prod., Trans., & Material Moving	4%	8%	7%
Military/Government	4%	3%	4%
Nat. Res., Const., & Maintenance	3%	2%	2%
Other	2%	<1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	12%	14%
\$20,000 - \$39,999	14%	20%	23%
\$40,000 - \$59,999	14%	17%	14%
\$60,000 - \$79,999	12%	16%	18%
\$80,000 - \$99,999	10%	4%	4%
\$100,000 - \$119,999	8%	15%	15%
\$120,000 - \$139,999	6%	2%	1%
\$140,000 - \$159,999	5%	3%	2%
\$160,000 - \$179,999	3%	2%	2%
\$180,000 - \$199,999	3%	<1%	<1%
\$200,000 and over	12%	10%	7%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$94,287	\$88,393

* 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."