

## CHARACTERISTICS OF TRAVELERS FROM JAPAN TO CALIFORNIA - 2015

Japan was California's fourth largest overseas market with approximately 537,000 visitors to California in 2015. Collectively visitors from Japan spent approximately \$1.18 billion in California.

Japanese visitors to California during 2015 reported spending \$319 per day during a 6.9 night average stay or approximately \$2,200 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 Japan

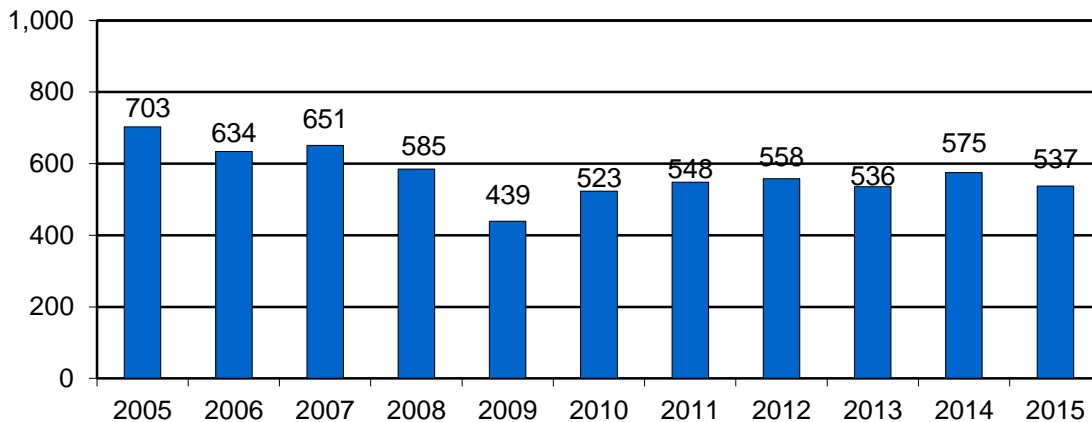
Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2005	3,883,906	18.1%	703,000
2006	3,672,584	17.3%	634,000
2007	3,531,489	18.4%	651,000
2008	3,249,578	18.0%	585,000
2009	2,918,268	15.0%	439,000
2010	3,386,076	15.4%	523,000
2011	3,249,569	16.9%	548,000
2012	3,698,073	15.1%	558,000
2013	3,730,287	14.4%	536,000
2014 <sup>3</sup>	3,579,363	16.1%	575,000
2015 <sup>3</sup>	3,478,630	15.4%	537,000

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

2) Source: U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

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



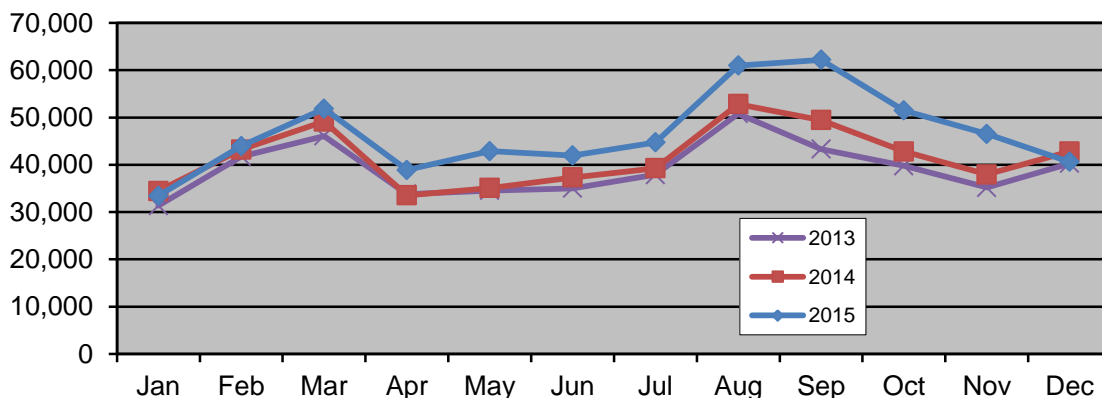
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

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 increased to 575,000 in 2014 with a market share of 16.1%, but has dropped in 2015 to 537,000 and a market share of 15.4%. 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 higher in most of the months of 2015 compared with 2014 and 2013. In 2015, Japanese resident arrivals at California ports-of-entry peaked in August and September. The lowest volumes were recorded in January, April and December.

**Residents of Japan  
Monthly Port of Entry Arrivals to California  
(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 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
- 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 more per visitor per day and per visitor per trip in California
- Make use of a credit card to pay for trip expenses
- Have a higher average age for both male and female survey respondents
- 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, or a personal recommendation to plan their trip
- Book their air trip with an internet booking service
- Select an airline due to the airfare
- Travel in economy/tourist/coach class
- 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 leisure-oriented activities
- Rent an auto or make use of air travel between U.S. cities for transportation while in the US
- Spend on air transportation in the U.S. as well as on entertainment

## Characteristics of Travelers from Japan to California – 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Japan (n = 1,163)	Leisure Visitors from Japan (n = 547)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	38%	69%
Visit Friends/Relatives	18%	17%	31%
Business	13%	23%	-
Convention/Conference	9%	16%	-
Other Purpose	6%	6%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	49%	79%
Visit Friends/Relatives	34%	27%	42%
Business	17%	31%	3%
Convention/Conference	12%	19%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	46%	49%
Online Travel Agency	34%	18%	22%
Personal Recommendation	29%	16%	23%
Travel Agency Office	23%	33%	26%
Travel Guide	15%	15%	19%
Corporate Travel Department	12%	8%	4%
Tour Operator/Travel Club	9%	4%	5%
National/State/City Travel Office	7%	6%	7%
<b>Advance Planning for Trip</b>			
7 days or less	5%	5%	3%
8 - 30 days	24%	29%	19%
31 - 60 days	19%	26%	28%
61 - 90 days	15%	19%	25%
More than 3 Months	38%	21%	26%
Total	100%	100%	100%
Average Planning Time in Days	108 days	77 days	87 days
<b>Advance Airline Reservations</b>			
7 days or less	8%	9%	5%
8 - 30 days	33%	41%	29%
31 - 60 days	20%	23%	28%
61 - 90 days	13%	14%	19%
91 - 120 days	9%	4%	6%
121 - 180 days	10%	6%	9%
6 Months or More	8%	3%	4%
Total	100%	100%	100%
Average Booking in Days	76 days	55 days	71 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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Japan (n = 1,163)	Leisure Visitors from Japan (n = 547)
<b>Means of Booking Air Trip**</b>			
Airlines Directly	31%	32%	42%
Internet Booking Service	29%	15%	20%
Travel Agency Office	26%	36%	33%
Corporate Travel Department	12%	13%	2%
Tour Operator/Travel Club	9%	4%	4%
Other	1%	3%	3%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	12%	12%
Non-Stop Flights	17%	17%	19%
Convenient Schedule	15%	7%	8%
Previous Good Experience	9%	11%	13%
Mileage Bonus/Frequent Flyer Program	8%	23%	18%
Safety Reputation	9%	12%	14%
Loyalty to Carrier	3%	3%	2%
In-flight Service Reputation	3%	8%	7%
Employer policy	3%	3%	1%
On-time Reputation	2%	3%	3%
Other	3%	2%	2%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	54%	64%
Premium Economy	10%	16%	19%
Executive/Business	8%	27%	15%
First Class	1%	2%	2%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	18%	23%
No	86%	82%	77%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	6%	9%
Meals	6%	6%	7%
Bus/Coach	6%	6%	7%
Guided Tours	6%	6%	7%
Rental Car	4%	1%	1%
Tour Guide for Entire Trip	5%	3%	3%
Airfare and Accommodation Only	3%	7%	9%
Cruise	2%	2%	3%
Recreation	1%	1%	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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Japan (n = 1,163)	Leisure Visitors from Japan (n = 547)
<b>Travel Companions**</b>			
Traveling Alone	59%	57%	42%
Spouse/Partner	22%	15%	26%
Family/Relatives	15%	13%	25%
Friends	6%	6%	11%
Business Associates	4%	12%	1%
Tour Group	1%	1%	2%
<b>Average Travel Party Size</b>	1.7	1.8	2.0
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	73%	82%	75%
Private Home	32%	20%	30%
Other	6%	1%	1%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	10.5 nights	10.1 nights
Mean Nights in California	12.6 nights	6.9 nights	6.5 nights
% of California Nights	52%	66%	64%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	12%	16%
Average Trips to the U.S. in Past Year	1.7 trips	2.3 trips	1.6 trips
<b>Average Number of States Visited</b>	2.0 states	1.4 states	1.5 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	2.0 dest.	2.2 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	49%	55%
San Francisco	45%	24%	22%
Las Vegas	30%	9%	11%
New York City	15%	5%	2%
San Diego	14%	17%	16%
Anaheim-Santa Ana	8%	15%	19%
Flagstaff-Grand Canyon-Sedona	7%	3%	4%
San Jose	6%	8%	3%
DC Metro Area	5%	1%	<1%
Monterey-Salinas	5%	2%	1%
Santa Barbara	4%	<1%	1%
Riverside/San Bernardino	4%	3%	3%
Oahu	3%	5%	8%
Seattle	3%	5%	9%
Chicago	3%	1%	<1%
Miami	2%	<1%	-
Sacramento	2%	2%	3%

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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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Japan (n = 1,163)	Leisure Visitors from Japan (n = 547)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	77%	78%
Sightseeing	83%	74%	81%
National Parks/Monuments	51%	22%	29%
Small Towns/Countryside	42%	14%	17%
Experience Fine Dining	40%	39%	39%
Amusement/Theme Parks	39%	28%	39%
Historical Locations	34%	14%	13%
Guided Tours	31%	16%	18%
Art Gallery/Museums	33%	14%	13%
Casino/Gamble	24%	8%	8%
Cultural/Ethnic Heritage Sites	20%	7%	8%
Concert/Play/Musical	20%	7%	7%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	30%	32%
Air Travel between U.S. Cities	44%	30%	26%
Auto, Private or Company	37%	31%	32%
City Subway/Tram/Bus	31%	25%	28%
Taxicab/Limousine	31%	41%	31%
Bus between Cities	19%	16%	21%
Ferry/River Taxi/Srt. Scenic Cruise	10%	4%	6%
Railroad between Cities	7%	8%	10%
Rented Bicycle/Motorcycle/Moped	5%	5%	7%
Cruise Ship/River Boat 1+ Nights	4%	1%	1%
Motor Home/Camper	2%	<1%	-
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,486	\$3,087
Per Visitor Per Day (CA)	\$157	\$319	\$287
Per Visitor/Trip (California)	\$1,979	\$2,200	\$1,867
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	35.8%	21.6%
Air Transportation in the U.S.	5.9%	1.8%	1.4%
Entertainment	12.9%	9.3%	15.0%
Food/Beverages	19.9%	23.2%	24.3%
Gifts/Souvenirs	19.2%	19.3%	26.5%
Ground Transportation in the U.S.	6.3%	6.6%	6.6%
Other	4.2%	4.0%	4.4%

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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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Japan (n = 1,163)	Leisure Visitors from Japan (n = 547)
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	43%	53%	49%
Cash from Home/Travelers Checks	27%	31%	38%
Cash Adv./Withdrawal Using Credit Card	18%	13%	10%
Cash Adv./Withdrawal Using Debit Card	6%	1%	1%
Purchases Using Debit Card	6%	1%	3%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	47 years	44 years
Average Age - Females	38 years	42 years	43 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	39%	28%
Service Occupations	11%	13%	19%
Student	12%	7%	7%
Sales and Office	11%	15%	13%
Retired	8%	4%	7%
Homemaker	4%	10%	17%
Prod., Trans., & Material Moving	3%	9%	5%
Military/Government	3%	1%	2%
Nat. Res., Const., & Maintenance	3%	2%	2%
Other	1%	1%	1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	5%	7%
\$20,000 - \$39,999	15%	8%	12%
\$40,000 - \$59,999	15%	17%	20%
\$60,000 - \$79,999	14%	11%	10%
\$80,000 - \$99,999	10%	19%	22%
\$100,000 - \$119,999	10%	9%	5%
\$120,000 - \$139,999	4%	6%	4%
\$140,000 - \$159,999	4%	3%	3%
\$160,000 - \$179,999	3%	7%	6%
\$180,000 - \$199,999	1%	1%	1%
\$200,000 and over	10%	14%	11%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$112,139	\$99,230

\* 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."