

CHARACTERISTICS OF TRAVELERS FROM SOUTH KOREA TO CALIFORNIA – 2013

South Korea was California’s seventh largest overseas market with approximately 389,000 visitors to California in 2013. Collectively visitors from South Korea spent approximately \$909 million in California.

South Korean visitors to California during 2013 reported spending \$234 per day during a 10.0 night average stay or approximately \$2,335 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

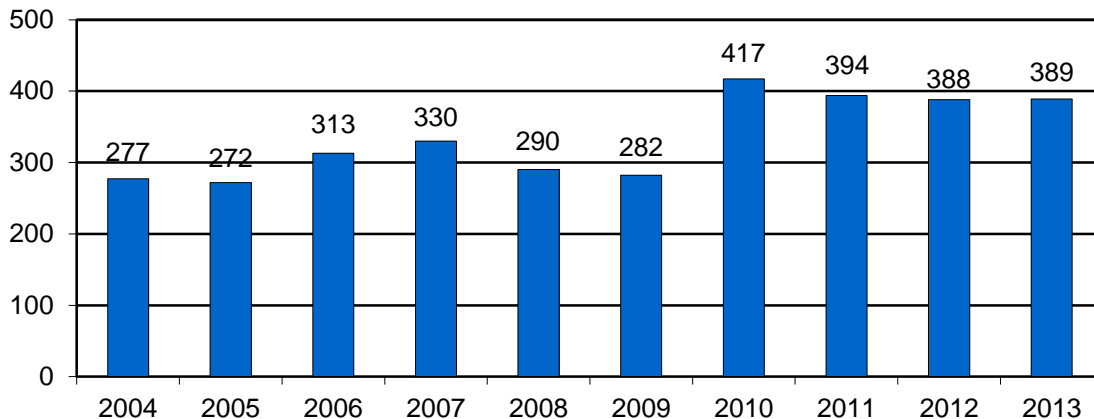
Visitors From South Korea

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	617,573	47.3%	292,000
2004	626,595	44.2%	277,000
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

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 South Korea to CA, 2004-2013 (in 000s)



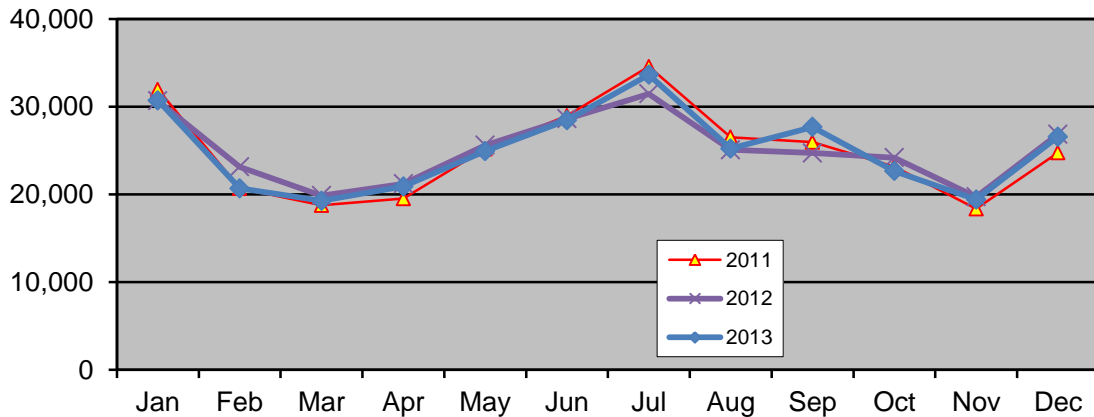
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

Visitor volume from South Korea to California was at its peak in 2000 with 419,000 visitors. California's market share of South Korean visitors to the U.S. was at its highest that year at 63%. Since then, the percentage of South Korean visitors who visit California has not risen above 49%. The volume of visitors to California from South Korea was down slightly in 2013 at 389,000 from a high of 417,000 in 2010.

South Korean Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from South Korea to California were nearly unchanged during most months of 2013 compared with 2011 and 2012. In all years, South Korean resident arrivals at California ports-of-entry peaked in January and July. The lowest volumes in 2013 were recorded in March and November.

**Residents of South Korea
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 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 tour operator or travel club
- Select an airline based on non-stop flights
- Be on their first trip to the U.S.
- Use a bus for transportation between U.S. cities
- Spend more per visitor per day as well as per trip in California
- Use cash from home or travelers checks for trip expenses
- Work as a homemaker
- Have a lower annual household income

Conversely, visitors from South Korea are less likely to:

- Travel to California for vacation/holiday purposes
- Plan or book their trip using a travel agency office
- Experience most of the leisure activities listed
- Use air travel, city subway/tram/bus, taxi/limousine, or ferry/river taxi/scenic cruise for transportation between U.S. cities
- Spend their travel dollars on accommodation
- Use a credit card for trip expenses

Characteristics of Travelers from South Korea to California – 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South Korea (n = 369)	Leisure Visitors from South Korea (n = 200)
Primary Purpose of Trip			
Vacation/Holidays	52%	44%	68%
Visit Friends/Relatives	17%	21%	32%
Business	15%	16%	-
Convention/Conference	9%	9%	-
Other Purpose	8%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	56%	78%
Visit Friends/Relatives	32%	34%	46%
Business	20%	19%	<1%
Convention/Conference	12%	12%	1%
Sources Used to Plan Trip**			
Airline	43%	36%	41%
Online Travel Agency	31%	28%	34%
Travel Agency Office	26%	15%	11%
Personal Recommendation	26%	24%	30%
Travel Guide	15%	7%	5%
Corporate Travel Department	14%	14%	4%
Tour Operator/Travel Club	9%	17%	24%
National/State/City Travel Office	8%	4%	5%
Advance Planning for Trip			
7 days or less	5%	8%	2%
8 - 30 days	27%	45%	45%
31 - 60 days	17%	21%	23%
61 - 90 days	14%	11%	14%
More than 3 Months	36%	16%	17%
Total	100%	100%	100%
Average Planning Time in Days	105 days	65 days	71 days
Advance Airline Reservations			
7 days or less	10%	17%	11%
8 - 30 days	35%	52%	55%
31 - 60 days	17%	15%	14%
61 - 90 days	13%	10%	10%
91 - 120 days	8%	1%	<1%
121 - 180 days	9%	3%	5%
6 Months or More	7%	3%	4%
Total	100%	100%	100%
Average Booking in Days	72 days	40 days	46 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
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South Korea (n = 369)	Leisure Visitors from South Korea (n = 200)
Means of Booking Air Trip**			
Travel Agency Office	31%	25%	23%
Airlines Directly	28%	22%	24%
Internet Booking Service	24%	22%	27%
Corporate Travel Department	15%	17%	5%
Tour Operator/Travel Club	9%	16%	22%
Other	2%	-	-
Main Factor in Selecting Airline			
Airfare	29%	22%	22%
Non-Stop Flights	17%	29%	39%
Convenient Schedule	15%	7%	8%
Mileage Bonus/Frequent Flyer Program	9%	10%	8%
Previous Good Experience	9%	8%	8%
Safety Reputation	6%	7%	1%
Loyalty to Carrier	4%	5%	5%
Employer policy	3%	5%	1%
In-flight Service Reputation	3%	5%	7%
On-time Reputation	2%	1%	<1%
Other	4%	2%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	80%	83%
Executive/Business	10%	11%	10%
Premium Economy	10%	8%	7%
First Class	1%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	15%	18%	24%
No	85%	82%	76%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	1%	1%
Attractions/Events/Entertainment	7%	11%	16%
Bus/Coach	7%	15%	19%
Cruise	2%	<1%	<1%
Guided Tours	6%	12%	17%
Meals	6%	13%	19%
Recreation	1%	1%	1%
Rental Car	5%	1%	<1%
Tour Guide for Entire Trip	4%	7%	9%

* 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
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South Korea (n = 369)	Leisure Visitors from South Korea (n = 200)
Travel Companions**			
Traveling Alone	61%	59%	49%
Spouse/Partner	21%	17%	23%
Family/Relatives	13%	18%	27%
Friends	6%	8%	8%
Business Associates	4%	4%	-
Tour Group	1%	1%	2%
Average Travel Party Size	1.6	1.7	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	71%	65%
Private Home	27%	30%	37%
Other	6%	3%	2%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	21.4 nights	16.0 nights
Mean Nights in California	12.2 nights	10.0 nights	9.8 nights
% of California Nights	54%	47%	61%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	41%	47%
Average Trips to the U.S. in Past Year	1.7 trips	1.8 trips	1.5 trips
Average Number of States Visited	2.0 states	1.8 states	1.9 states
Average Number of Destinations Visited	3.0 dest.	2.6 dest.	2.9 dest.
Places Visited in the U.S.**			
Los Angeles	59%	62%	73%
San Francisco	47%	47%	49%
Las Vegas	30%	35%	42%
New York City	16%	10%	12%
San Diego	13%	7%	4%
Anaheim-Santa Ana	8%	8%	9%
Flagstaff-Grand Canyon-Sedona	7%	10%	14%
San Jose	6%	6%	2%
DC Metro Area	4%	3%	3%
Monterey-Salinas	4%	1%	<1%
Oahu	4%	1%	2%
Santa Barbara	3%	<1%	<1%
Riverside/San Bernardino	3%	1%	1%
Chicago	3%	3%	5%
Seattle	3%	3%	<1%
Sacramento	3%	5%	3%
Miami	3%	1%	<1%

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**Characteristics of Travelers from South Korea to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South Korea (n = 369)	Leisure Visitors from South Korea (n = 200)
Activities Experienced While in the U.S.**			
Shopping	88%	78%	79%
Sightseeing	84%	84%	90%
National Parks/Monuments	49%	39%	44%
Experience Fine Dining	43%	27%	25%
Small Towns/Countryside	41%	13%	16%
Amusement/Theme Parks	38%	43%	54%
Historical Locations	37%	18%	20%
Guided Tours	33%	20%	26%
Art Gallery/Museums	30%	22%	25%
Casino/Gamble	25%	24%	27%
Cultural/Ethnic Heritage Sites	21%	19%	22%
Concert/Play/Musical	20%	26%	29%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	33%	31%
Rented Auto	43%	36%	29%
Auto, Private or Company	37%	33%	31%
City Subway/Tram/Bus	33%	21%	23%
Taxicab/Limousine	33%	22%	19%
Bus between Cities	18%	26%	34%
Ferry/River Taxi/Srt. Scenic Cruise	12%	3%	5%
Railroad between Cities	8%	4%	5%
Rented Bicycle/Motorcycle/Moped	5%	1%	1%
Cruise Ship/River Boat 1+ Nights	4%	1%	2%
Motor Home/Camper	2%	1%	2%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$4,997	\$5,785
Per Visitor Per Day (CA)	\$159	\$234	\$362
Per Visitor/Trip (California)	\$1,940	\$2,335	\$3,543
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	23.9%	15.8%
Air Transportation in the U.S.	6.9%	5.0%	5.4%
Entertainment	12.2%	12.2%	14.7%
Food/Beverages	17.8%	19.2%	20.3%
Gifts/Souvenirs	21.9%	23.4%	29.8%
Ground Transportation in the U.S.	5.6%	6.9%	6.1%
Other	6.3%	9.5%	7.8%

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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
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South Korea (n = 369)	Leisure Visitors from South Korea (n = 200)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	29%	27%
Cash from Home/Travelers Checks	26%	44%	48%
Cash Adv./Withdrawal Using Credit Card	18%	24%	22%
Cash Adv./Withdrawal Using Debit Card	7%	2%	2%
Purchases Using Debit Card	6%	1%	1%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	40 years	40 years
Average Age - Females	39 years	36 years	37 years
Occupation			
Mgmt., Business, Science, & Arts	44%	44%	33%
Service Occupations	11%	13%	16%
Student	11%	10%	11%
Sales and Office	10%	11%	8%
Retired	8%	2%	3%
Homemaker	5%	14%	20%
Prod., Trans., & Material Moving	4%	1%	2%
Military/Government	4%	2%	2%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	2%	2%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	18%	18%
\$20,000 - \$39,999	14%	15%	19%
\$40,000 - \$59,999	14%	18%	15%
\$60,000 - \$79,999	12%	12%	12%
\$80,000 - \$99,999	10%	18%	21%
\$100,000 - \$119,999	8%	6%	5%
\$120,000 - \$139,999	6%	2%	1%
\$140,000 - \$159,999	5%	3%	2%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	2%	2%
\$200,000 and over	12%	6%	5%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$78,226	\$74,264

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