

CHARACTERISTICS OF TRAVELERS FROM TAIWAN TO CALIFORNIA – 2008

Taiwan was one of California's top ten overseas markets with approximately 189,000 visitors to California in 2008. Collectively visitors from Taiwan spent approximately \$285 million in California.

Taiwanese visitors to California during 2008 reported spending \$107 per day during a 14.1 night average stay or approximately \$1,509 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

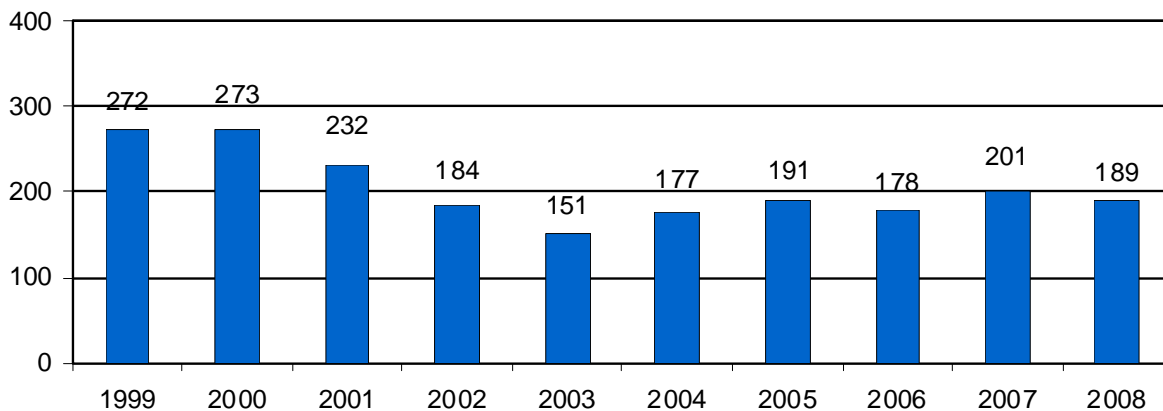
Visitors From Taiwan

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	386,413	66.2%	256,000
1999	453,299	60.0%	272,000
2000	457,302	59.6%	273,000
2001	357,064	65.0%	232,000
2002	288,032	63.9%	184,000
2003	238,999	63.3%	151,000
2004	297,684	59.6%	177,000
2005	318,886	59.8%	191,000
2006	300,382	59.2%	178,000
2007	311,020	64.5%	201,000
2008	294,893	64.2%	189,000

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

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

Number of Visitors from Taiwan to CA, 1999-2008 (in 000s)



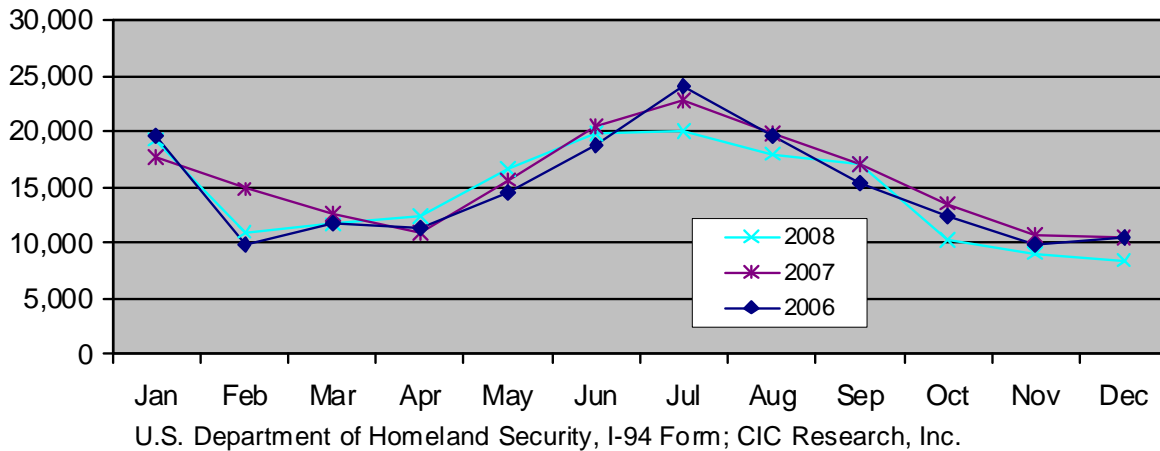
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 151,000 visitors in 2003. Since then, visitor volume has risen and fallen in the last 5 years and has increased by one-third from its lowest level.

Taiwanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Taiwan to California were mostly consistent in 2008 compared with 2006 and 2007. In general, Taiwanese resident arrivals at California ports-of-entry have recorded seasonal peaks in January and July. The lowest volumes were recorded in February, November, and December.

**Residents of Taiwan
Monthly Port of Entry Arrivals to CA
2006-2008**



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/professional purposes
- Have decidedly lower trip planning and advance airline booking horizons
- Plan and book their air trip through a travel agent
- Select an airline due to a non-stop flight
- Mention safety reputation as a main factor in selecting an airline
- Travel in executive or business class
- Stay in a private home
- Spend more nights in California
- Use a company or private auto for transportation while in the U.S.
- Spend a lower percentage of their travel dollar on lodging
- Have a lower average household income

Conversely, visitors from Taiwan are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Use a personal computer to plan or book their trip
- Mention airfare as a main factor in selecting an airline
- Travel in economy/tourist/coach class
- Travel with a spouse
- Stay in hotels and other forms of paid lodging
- Visit San Francisco and Las Vegas
- Experience activities that are more culture-oriented, such as visiting historical places, small towns, national parks, the countryside, and cultural heritage sites
- Use a taxi/limousine, airlines, or public transportation in the U.S.

Characteristics of Travelers from Taiwan to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Taiwan (n = 497)	Leisure Visitors from Taiwan (n = 204)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	19%	40%
Visit Friends/Relatives	19	28	60
Business/Professional	27	37	-
Convention/Conference	7	8	-
Other Purpose	5	8	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	47%	72%
Visit Friends/Relatives	37	52	80
Business/Professional	31	41	3
Convention/Conference	11	14	0
Sources Used to Plan Trip**			
Airlines Directly	21%	22%	21%
Corporate Travel Department	11	13	5
Personal Computer	42	32	36
Friends/Relatives	16	17	22
Newspapers/Magazines	3	2	1
State/City Travel Office	4	1	-
Tour Company	6	7	5
Travel Agency	43	55	50
Travel Guides	10	4	4
Advance Planning for Trip			
7 days or less	9%	13%	3%
8 - 30 days	30	50	44
31 - 60 days	19	19	26
61 - 90 days	13	7	11
More than 3 Months	30	11	17
Total	100%	100%	100%
Average Planning Time in Days	92	47	62
Advance Airline Reservations			
7 days or less	16%	23%	10%
8 - 30 days	38	55	57
31 - 60 days	17	15	23
61 - 90 days	10	4	5
91 - 120 days	5	3	5
121 - 180 days	8	1	0
6 Months or More	6	1	-
Total	100%	100%	100%
Average Booking in Days	60	30	35

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

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

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Taiwan to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Taiwan (n = 497)	Leisure Visitors from Taiwan (n = 204)
Means of Booking Air Trip			
Airlines Directly	12%	8%	11%
Corporate Travel Department	11	12	3
Personal Computer	22	9	13
Travel Agent	48	63	66
Travel Club	1	1	1
Tour Operator	4	6	6
Other/Don't Know	3	1	0
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	14%	15%
Schedule	15	8	5
Non-Stop Flight	13	26	31
Mileage Bonus/Frequent Flyer Program	12	12	10
Previous Good Experience	10	9	12
Safety Reputation	7	17	16
Airline Loyalty	4	3	3
In-flight Service	5	5	7
Employer policy	4	5	-
Other	6	2	2
Airline Seating Area			
Economy/Tourist/Coach	77%	64%	72%
Executive/Business	20	32	22
First Class	3	5	7
Total	100%	100%	100%
Use of Package			
Yes	11%	11%	11%
No	89	89	90
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	20%	0%
8 - 30 days	26	43	53
31 - 60 days	23	33	45
61 - 90 days	12	1	2
91 - 120 days	5	-	-
121 - 180 days	17	3	-
6 Months or More	14	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from Taiwan to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Taiwan (n = 497)	Leisure Visitors from Taiwan (n = 204)
Travel Companions**			
Business Associates	10%	16%	-
Family/Relatives	23	25	44%
Friends	12	8	10
Spouse	27	18	33
Tour Group	2	4	2
Traveling Alone	39	42	33
Average Travel Party Size	1.5	1.5	1.7
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	60%	43%
Private Home	28	51	75
Other	4	2	1
Length of Stay			
Mean Nights in the U.S.	21.2	14.1	13.0
Mean Nights in California	11.0	21.1	17.2
% of California Nights	52%	67%	76%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	16%	19%
Average Trips to the U.S. in Past Year	2.0	2.3	1.9
Average Trips to the U.S. in Past 5 Years	6.3	6.9	5.4
Average Number of States Visited	2.0	1.7	1.7
Average Number of Destinations Visited	2.9	2.2	2.4
Places Visited in the U.S.**			
Los Angeles	53%	57%	65%
San Francisco	49	38	43
Las Vegas	28	14	22
New York City	17	8	10
San Diego	13	8	4
San Jose	7	12	10
Anaheim-Santa Ana	7	4	1
Yosemite	5	1	4
Grand Canyon	4	2	4
Chicago	4	4	1
DC Metro Area	4	2	2
Monterey-Salinas	4	2	3
Seattle	3	3	6
Sacramento	3	2	2
Riverside/San Bernardino	3	2	2
Santa Barbara	3	1	0
Oakland	3	6	7

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**Characteristics of Travelers from Taiwan to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Taiwan (n = 497)	Leisure Visitors from Taiwan (n = 204)
Activities Experienced While in the U.S.**			
Dining Out	87%	81%	84%
Shopping	85	91	95
Sightseeing in Cities	53	50	60
Historical Places	44	32	42
Visiting Small Towns	36	23	27
National Parks	35	20	28
Amusement/Theme Parks	34	33	45
Touring Countryside	30	17	22
Cultural Heritage Sites	28	18	22
Casinos/Gambling	24	22	33
Art Gallery/Museum	23	17	21
Guided Tours	22	22	24
Transportation While in the U.S.**			
Taxi/Limousine	42%	26%	17%
Rented Auto	40	32	32
Airlines in U.S.	36	21	36
Company or Private Auto	28	46	52
City Subway/Tram/Bus	26	15	18
Railroad between Cities	11	5	8
Bus between Cities	9	6	11
Motor Home/Camper	2	1	1
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,431	\$2,792
Per Visitor/Trip (U.S.)	2,607	2,266	1,666
Per Visitor Per Day	123	107	97
Per Visitor/Trip (California)	\$1,353	\$1,509	\$1,261
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$578	\$286
Food/Beverages	526	378	363
Gifts/Souvenirs	450	431	491
Transportation in the U.S.	425	560	250
Entertainment	234	174	213
Expenses at the Airport	37	31	24
Other	135	114	39
Total Spending Per Visitor/Trip	\$2,607	\$2,266	\$1,666

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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Taiwan (n = 497)	Leisure Visitors from Taiwan (n = 204)
Payment Method for Trip Expenses			
Credit Cards	53%	53%	46%
Cash	37	43	48
Debit Cards	6	1	1
Travelers Checks	3	3	5
Total	100%	100%	100%
Age			
Average Age - Males	41	41	46
Average Age - Females	38	39	39
Occupation			
Manager/Executive	34%	32%	29%
Professional/Technical	32	35	29
Student	8	11	10
Clerical/Sales	7	4	4
Retired	6	5	10
Other	13	13	9
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	4%	4%
\$20,000 - \$39,999	10	14	15
\$40,000 - \$59,999	13	19	19
\$60,000 - \$79,999	11	13	15
\$80,000 - \$99,999	11	9	8
\$100,000 - \$119,999	11	11	6
\$120,000 - \$139,999	7	8	7
\$140,000 - \$159,999	6	4	5
\$160,000 - \$179,999	4	4	8
\$180,000 - \$199,999	3	1	3
\$200,000 and over	18	13	11
Total	100%	100%	100%
Average Annual Income	\$107,200	\$95,600	\$96,300

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