



STATE OF WASHINGTON  
DEPARTMENT OF COMMUNITY,  
TRADE AND ECONOMIC DEVELOPMENT

---

# Overseas Travel to Washington State 2006

November 2007

**Prepared by:**

Dean Runyan Associates  
833 SW 11<sup>th</sup> Avenue, Suite 920  
Portland, Oregon 97205  
(503) 226-2973  
[www.deanrunyan.com](http://www.deanrunyan.com)

**Prepared for:**

Washington State Community, Trade and  
Economic Development  
Tourism Office  
[www.experiencewa.com/industry](http://www.experiencewa.com/industry)

**Juli Wilkerson  
Director**

# Overseas Travel to Washington State

November 2007

**State of Washington**  
Department of Community,  
Trade and Economic Development  
360.725.4000

*Prepared by*

**Dean Runyan Associates, Inc.**

833 SW 11th Avenue, Suite 920  
Portland, Oregon 97205  
503.226.2973  
[www.deanrunyan.com](http://www.deanrunyan.com)

# Table of Contents

<b>HIGHLIGHTS FOR OVERSEAS VISITORS TO WASHINGTON.....</b>	<b>ii</b>
<b>INTRODUCTION AND METHODOLOGY .....</b>	<b>1</b>
<b>SAMPLE .....</b>	<b>2</b>
<b>OVERSEAS TRAVELERS TO WASHINGTON .....</b>	<b>4</b>
OVERSEAS ARRIVALS.....	4
PORT OF ENTRY .....	8
MAIN TRIP PURPOSE .....	8
INFORMATION SOURCES USED BY OVERSEAS TRAVELERS TO WASHINGTON .....	10
ACCOMMODATIONS .....	11
ACTIVITIES.....	12
TRAVEL PARTIES.....	15
MODE OF TRANSPORTATION .....	16
TRAVEL IN THE UNITED STATES.....	16
DEMOGRAPHICS .....	22
EXPENDITURES.....	24
<b>COUNTRY REPORTS.....</b>	<b>27</b>
AUSTRALIA/NEW ZEALAND .....	28
JAPAN.....	29
SOUTH KOREA .....	31
SOUTH KOREA .....	31
TAIWAN .....	32
UNITED KINGDOM.....	33
<b>COUNTRIES WITH SMALL SAMPLE SIZES .....</b>	<b>34</b>
<b>REFERENCES.....</b>	<b>35</b>
<b>APPENDIX A .....</b>	<b>36</b>

## Highlights: Overseas Visitors to Washington

- Approximately 390,000 overseas visitors traveled to Washington in 2006, comprising almost 1.8% of all overseas arrivals to the United States. Overseas arrivals to Washington increased by 7% between 2004 and 2006.
- Japan and the United Kingdom remain at the top of the list with the highest numbers of residents traveling to Washington, and are projected to keep this position during the next five years. Japan and the U.K. also comprised the largest number of residents traveling to the U.S.
- Approximately two-thirds of visitors from European markets are leisure travelers, whereas business travelers dominate travel from Asian markets.
- Nearly 79% of all overseas travelers to Washington in 2004-2006 had visited the U.S. at least once before.
- Shopping and dining in restaurants remained the most popular activities of both leisure and non-leisure travelers<sup>1</sup>. Other popular activities included sightseeing in cities, visiting small towns, historical places, national parks, cultural heritage sites, touring the countryside, and visiting art galleries and museums. Amusement and theme parks were popular for those visiting other states in addition to Washington.
- During the past three years, the state of Washington ranked 14<sup>th</sup> among U.S. states and territories with respect to overseas arrivals. Overseas arrivals to Washington increased by 7% between 2004 and 2006, while traditionally popular destinations such as Florida, Hawaii and Arizona lost overseas visitor share.
- Seattle remains the most popular port of entry among all overseas visitors to Washington.
- 54% of overseas travelers to Washington reported leisure and 41% reported business as their main trip purpose. However, the percentage of leisure trips has dropped by 7% since 2002-2004. Slightly more than half of leisure overseas travelers visited friends and relatives.
- Travel agencies remain the most common source of information for both leisure (44%) and non-leisure (51%) overseas travelers, but their role is declining.

---

<sup>1</sup> Non-leisure overseas travelers are those who visited Washington for any other reason than leisure or visiting family or friends, and are represented primarily – but not exclusively – by business travelers. A complete description of the category is provided in the following section of this report: Introduction and Methodology.

- About 62% of all overseas travelers stayed in a hotel/motel during their trip to Washington. More leisure travelers stayed at a private home and fewer booked a hotel in 2004-2006 than in prior years. Among non-leisure overseas travelers 80% preferred to stay in commercial lodging during their trip.
- A spouse accompanied more leisure travelers in 2004-2006 than in prior years. Over 80% of non-leisure travelers to Washington were alone or accompanied by a business associate.
- Airlines remain the most frequently used mode of transportation for leisure visitors traveling within the United States. Fewer leisure travelers opted to rent a car during their trips than in previous years. Over half of non-leisure travelers (51%) flew during their trips and/or took a taxi to get around cities in the United States.
- Nearly 80% of overseas travelers to Washington in 2004-2006 spent most of their trips in the Pacific Region. Leisure travelers were more likely to choose a main destination outside of the Pacific Region than were non-leisure travelers. The Mountain Region attracted a larger percentage of overseas visitors in 2004-2006, mostly due to an increase in Las Vegas visitation.
- A third of overseas travelers came to the state of Washington as an exclusive destination, and this percentage has increased since 2002-2004. Among all other states, California and Oregon attracted over half of Washington's overseas visitors.
- The average age of overseas leisure travelers to Washington in 2004-2006 was 44 years for men and 41 years for women.
- More than 50% of overseas leisure travelers to Washington worked in a professional/technical field or held managerial/executive positions. About 14% of visitors were retirees on vacation.
- The average annual household income of overseas leisure travelers to Washington was \$81,100 – \$20,000 higher than in 2004-2006. In general, non-leisure overseas travelers to Washington had higher salaries than did leisure travelers; almost 70% of them earned at least \$60,000 per year.
- Trip expenditures within the United States for overseas visitors to Washington were \$1,928 per visitor per leisure trip, and \$2,273 per visitor per non-leisure trip.

# Introduction and Methodology

Overseas travel to the state of Washington is extensive, with residents of 69 different countries visiting in 2006. Washington State Tourism has established marketing programs and targets for key countries that contribute significant portions of this travel. This study provides current information and findings for some of these priority markets based on the International Trade Administration's (ITA) 2004 through 2006 surveys of International Air Travelers to the U.S.

The overseas findings in this report are based on data gathered by *the In-Flight Survey of International Air Travelers*, conducted by the U.S. International Trade Association (ITA). A custom data tabulation was prepared by CIC Research of San Diego, California. The data uses a combined three-year period, January 2004 through December 2006 due to small annual sample sizes for some selected target markets. This study makes only limited comparisons between current findings and those for previous time periods due to sampling differences and data limitations – in particular, inconsistencies in the In-Flight Survey sampling procedures for each year, and the fact that the data represent a three-year time period. The business traveler category from the 2002-2004 study is not directly comparable to the non-leisure traveler category in the current study. Though a majority of non-leisure travelers made business trips, the category also includes some travelers who did not.

The data tabulation includes only overseas travelers to the U.S. who reported traveling to Washington as part of their trip. However, overseas travelers often visit other states in addition to Washington, and data collected by the survey covers the entire trip to the U.S. Accordingly, the figures for activities, lodging, expenditures and other variables may pertain to other locations as well as go locations within the state of Washington.

The survey data are collected voluntarily by major international airlines. The number and list of participating airlines may vary from year to year and affect the survey results. A combined total of 42 airlines (see Appendix A) participated in the survey during the three-year period. While many of the 42 airlines participated during all three years of the survey period, in any individual year a few carriers may have opted out of and/or additional carriers may have been added to the survey. The specific flights to be surveyed are selected at random.

The total number of overseas arrivals to Washington, including country breakouts, was estimated by weighting the In-Flight Survey results to the Department of Homeland Security (DHS) estimates of total visitors (based on the I-94 Form). Those expanded estimates were intended to include all overseas visitors to Washington, not only air travelers. However, weighting the data cannot correct for the instances where no survey data were collected for a particular market.

All travel characteristics of overseas travelers to Washington discussed in this study are based on the In-Flight Survey, but the reported percentages were weighted by the total number of overseas visitors (DHS data) for a specific country of residence and a port of

entry. These weighted percentages cannot directly be used to estimate the number of actual respondents for a particular question. The number of respondents (n) found under some figures in the text is the actual sample size and is provided to show the reliability of estimates. Generally, the more respondents to a particular question, the more reliable the estimate is.

Overseas travelers included in the sample entered the U.S. via commercial airline and indicated that they would visit the state of Washington during their trip. Leisure overseas travelers who visited the state of Washington reported leisure or visiting family or friends as the main purpose of their trip. Non-leisure overseas travelers are those who visited the state of Washington for any other reason than leisure or visiting family or friends. Non-leisure overseas travelers are represented primarily by business travelers who visited Washington to participate in business/professional activities and/or to attend a convention or professional conference. Other reasons for non-leisure travel may include government affairs, military, study/teaching, religion and health treatment.

Analysis for Japan is conducted separately for leisure and non-leisure travelers; these categories are not reported separately for the remainder of the countries due to limited sample sizes. Because leisure and non-leisure travelers typically have very different characteristics, the findings for these two Japanese travel categories are quite dissimilar and, accordingly, are not directly comparable with the findings for travelers from the other countries.

## Sample

A total of 2,074 questionnaires from overseas travelers visiting Washington as a part of their trips were collected during the three-year period (2004-2006). The leisure travel sample size is 1,023 respondents. The non-leisure travel sample size is 1,051 respondents.

Selected primary markets were chosen based on visitor arrivals and existing marketing programs and targets. The U.S. Office of Travel and Tourism Industries recommends that the number of sampled visitors to a particular destination be 100 for more reliable visitor estimates. With regard to the data for this study, four of the nine target markets (China/Hong Kong, Germany, France and Benelux) had sample sizes smaller than 100. See Table 1. Accordingly, the reporting for these countries is limited, and any findings that are included here should be interpreted with caution.

It is worth noting that the proportions of leisure and non-leisure travelers vary widely by country of origin. Around two-thirds of visitors from European markets are leisure travelers, whereas under half of those from Asia visit for leisure, and only about a quarter of those visiting from China/Hong Kong. (See Table 2.) It is important to keep these percentages in mind when looking at overall travel profiles from individual markets.

Table 1  
**Washington Overseas Traveler Sample Size (2004-2006)**

Taiwan	409
Australia/New Zealand	344
Japan	325
South Korea	233
United Kingdom	155
China/Hong Kong	79*
Germany	75*
France	27*
Benelux	15*
<b>Total</b>	<b>1,662</b>

\*Smaller than recommended sample size of 100.  
Source: CIC Research, Inc.

Table 2  
**Foreign Overseas Travelers to Washington, 2004-2006**  
by Main Purpose of Trip as Recorded by the In-Flight Survey  
(percent of respondents from each country)

Country of Residence	Main Purpose of Trip		
	Leisure	Business	Other/Missing
Taiwan	40%	48%	12%
Australia/New Zealand	66%	28%	6%
Japan	44%	47%	9%
South Korea	47%	43%	10%
United Kingdom	68%	28%	4%
China/Hong Kong	25%	62%	13%
Germany	70%	25%	5%
France	59%	33%	8%
Benelux	67%	20%	13%
All overseas visitors to WA	49%	41%	10%

Source: CIC Research, Inc.

# Overseas Travelers to Washington

## Overseas Arrivals

### *Comparison to the United States*

Washington's market share of air travelers, averaged for three years (2004-2006), remained the same as in the previously reported period (2002-2004) at 1.8%. It was assumed that this market share could be expanded to overseas arrivals by all modes of transportation and can be used to estimate total overseas arrivals to Washington. Estimating in this manner, 1.8% of all 2006 overseas arrivals (21,668,290 for all transportation modes) to the United States totals approximately 390,000 foreign visitors to Washington.

Almost a third of all overseas travelers to Washington came from either Japan or the United Kingdom, and one out of ten was a resident of South Korea. Nine selected countries (as shown in Table 3) accounted for nearly seven out of ten visitors to Washington; the same countries account for six out of ten visitors to the United States. Other countries with a smaller number of travelers to Washington that are not reported here include: Singapore, India, Malaysia, Indonesia, Brazil, the Philippines, Thailand, and Italy.

Table 3  
**Overseas Arrivals to Washington and to the United States, 2006**  
 Selected Countries of Origin

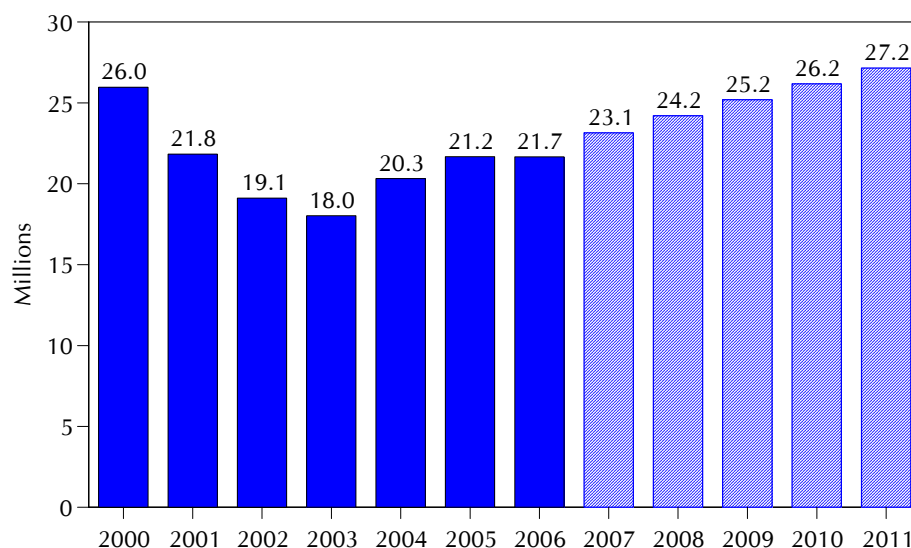
Country of Origin	Washington			United States		
	Number (000)	Market Share (%)	Rank	Number (000)	Market Share (%)	Rank
Japan	62	16	1	3,673	17	2
United Kingdom	54	14	2	4,176	19	1
South Korea	39	10	3	758	3	5
Australia/New Zealand	31	8	4	742	3	6
Germany	26	7	5	1,386	6	3
China/Hong Kong	25	6	6	458	2	10
Taiwan	18	5	7	300	1	16
France	13	3	8	790	4	4
Benelux	5	1	9	648	3	7
<i>Subtotal</i>	273	70	--	12,931	58	--
Other countries	117	30	--	8,737	42	--
<b>Total</b>	<b>390</b>	<b>100</b>	<b>--</b>	<b>21,668</b>	<b>100</b>	<b>--</b>

Excludes: Canada and Mexico

Source: United States- ITA, Office of Travel and Tourism Industries  
 Washington- CIC Research-Custom Report, July 2007

Overseas arrivals to the United States are projected to grow above pre-September 11<sup>th</sup> levels to over 27 million by 2011. See Figure 1. As in the 2002-2004 reporting period, Japan and the United Kingdom have the highest numbers of residents traveling to both the United States and to Washington, and are projected to continue to do so during the next five years. See Tables 3 and 4.

Figure 1  
Overseas Arrivals to the United States, 2000-2011



Excludes: Canada and Mexico

Source: ITA, Office of Travel and Tourism Industries, Global Insights, Inc. (October 2007 Forecast)

Table 4  
Overseas Arrivals to the United States: Selected Target Markets  
(Thousands)

Country of Origin	Actual	Forecast					% Change
	2006	2007	2008	2009	2010	2011	2006-2011
Japan	3,673	3,561	3,744	3,926	4,108	4,289	17%
United Kingdom	4,176	4,365	4,530	4,692	4,852	5,009	20%
South Korea	758	810	849	888	927	965	27%
Australia/New Zealand	741	789	822	854	887	919	24%
Germany	1,386	1,498	1,580	1,638	1,696	1,753	26%
China/Hong Kong	457	534	582	633	686	742	62%
Taiwan	300	313	328	342	356	317	6%
France	790	944	973	1,001	1,029	1,056	34%
Benelux*	635	684	709	734	758	783	23%

\* Excludes Luxemburg - forecast data was not available.

Source: ITA, Office of Travel and Tourism Industries, Global Insights, Inc. (October 2007 Forecast)

Nearly 79% of all overseas travelers to Washington in 2004-2006 had visited the U.S. at least once before, and about 21% were visiting the United States for the first time. The percent of first international trips to the United States among Washington overseas visitors increased by 3% over the 2002-2004 reporting period. Leisure travelers were more likely to be visiting the United States for the first time (24%) than were non-leisure travelers (19%).

### *Comparison to other states*

During the past three years, the state of Washington ranked 14<sup>th</sup> among U.S. states and territories with respect to overseas arrivals. Nine of ten overseas travelers to the United States visited at least one of the top five states on the list (New York, California, Florida, Hawaii and Nevada). (See Table 5.) However all five of those top states experienced decline or slower growth than Washington in overseas arrivals over past three years. Overseas arrivals to Washington increased by 7% between 2004 and 2006. (See Figure 2.)

Table 5  
**Overseas Arrivals to Top U.S. States and Territories, 2004-2006**

	State/Territory Visited	2006			2005			2004		
		Number (000)	Market Share (%)	Rank	Number (000)	Market Share (%)	Rank	Number (000)	Market Share (%)	Rank
1	New York	6,414	29.6	1	6,092	28.1	1	5,426	26.7	1
2	California	4,615	21.3	2	4,791	22.1	2	4,430	21.8	2
3	Florida	4,117	19.0	3	4,379	20.2	3	4,207	20.7	3
4	Hawaiian Islands	2,058	9.5	4	2,255	10.4	4	2,215	10.9	4
5	Nevada	1,690	7.8	5	1,821	8.4	5	1,626	8.0	5
6	Guam	1,170	5.4	6	1,127	5.2	7	1,036	5.1	6
7	Massachusetts	1,105	5.1	7	867	4.0	10	935	4.6	8
8	Illinois	1,083	5.0	8	1,149	5.3	6	975	4.8	7
9	Texas	975	4.5	9	954	4.4	9	874	4.3	9
10	New Jersey	845	3.9	10	997	4.6	8	833	4.1	10
11	Pennsylvania	672	3.1	11	629	2.9	12	691	3.4	11
12	Arizona	563	2.6	12	564	2.6	13	630	3.1	12
13	Georgia	520	2.4	13	650	3.0	11	427	2.1	13
<b>14</b>	<b>Washington</b>	<b>390</b>	<b>1.8</b>	<b>14</b>	<b>369</b>	<b>1.7</b>	<b>14</b>	<b>366</b>	<b>1.8</b>	<b>14</b>
15	Ohio	390	1.8	14	*	*	14	325	1.6	17
	<b>All United States</b>	<b>21,668</b>			<b>21,679</b>			<b>20,322</b>		

\* Estimate not shown due to sample size fewer than 400, a new OTTI statistical policy

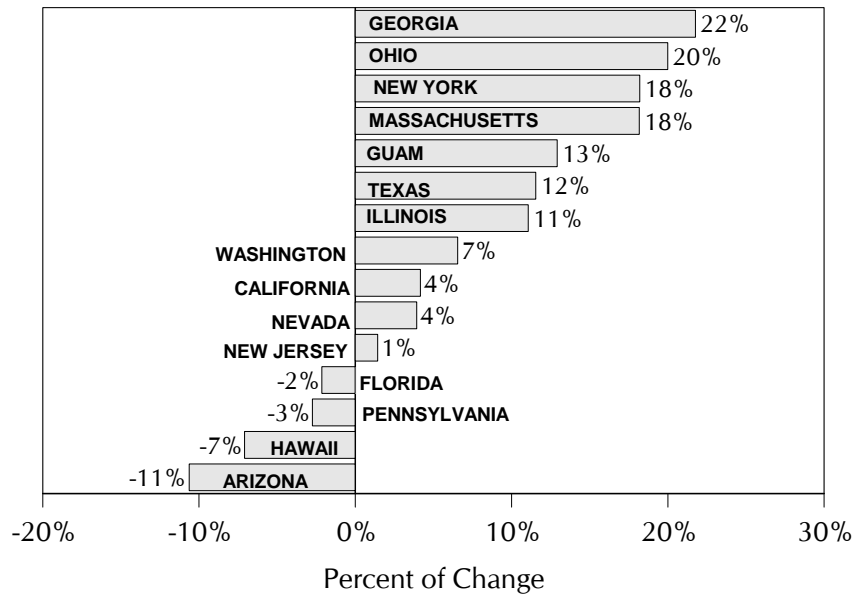
Excludes: Canada and Mexico

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries

The increase in the number of overseas travelers to Washington may be explained by additional non-stop direct air service provided by many airlines with arrivals to and departures from the Seattle-Tacoma International Airport. With existing demand for non-

stop flights, more airlines are looking for ways to establish direct international routes to primary destinations in the United States.

Figure 2  
**Change in Overseas Arrivals, 2004 to 2006**  
 By State



Source: CIC Research, Inc.

The Seattle-Tacoma International Airport is the only airport in Washington that offers several non-stop connections to the selected target markets. See Table 6. Among the newest direct air services, Korean Air began non-stop flights to Seoul, South Korea in June 2005, and Air France has been operating non-stop flights from Seattle to Paris since June 2007. AeroMexico began direct service from Seattle to Mexico City in July 2007, and future editions of this report will include Mexican-U.S. travel data. There has also been an interest in reestablishing direct air service from Seattle to China since non-stop flights were discontinued by China Eastern airlines in 1997.

Table 6  
**Non-Stop International Routes, Seattle-Tacoma International Airport**  
 Selected Target Markets Only

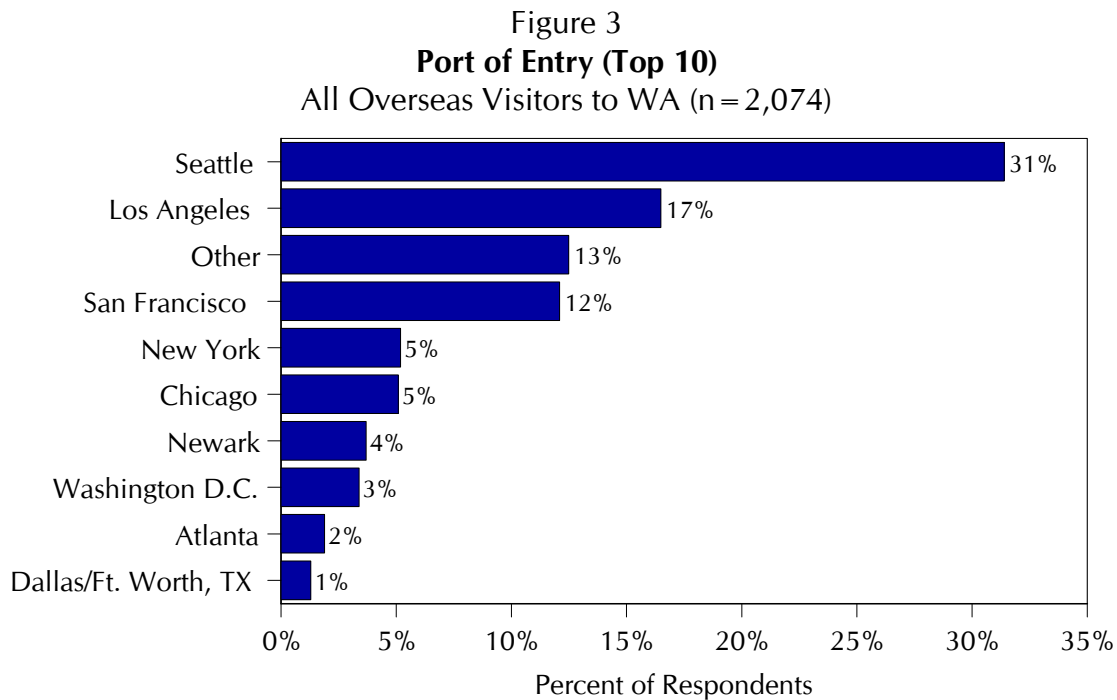
City	Airline
Amsterdam, Netherlands	Northwest Airlines
London, England	British Airways
Paris, France	Air France
Seoul, South Korea	Asiana Airlines, Korean Air
Taipei, Taiwan	China Airlines, EVA Airways
Tokyo, Japan	Northwest Airlines, United

Source: The Port of Seattle

## Port of Entry

Seattle remains the most-used port of entry among all overseas visitors to Washington – nearly a third of the state’s visitors during 2004-2006 arrived via Seattle (Figure 3). Almost 30% of overseas travelers used two other major ports of entry on the West Coast: Los Angeles (17%) and San Francisco (12%). In spite of its proximity to Washington, only about 1% of overseas travelers to Washington arrived via the Portland International Airport. In comparison with the previously reported period (2002-2004), fewer travelers used Los Angeles as a port of entry in 2004-2006 on the West Coast, opting instead to enter the United States via Seattle or San Francisco. New York is still the most popular East Coast port of entry for overseas visitors to Washington; Newark increased by 1% from 2002-2004, and Chicago lost about 3% of overseas travelers visiting Washington.

Seattle was used more often as a primary port of entry than Los Angeles for leisure travelers. Otherwise, overseas leisure travelers to Washington showed similar patterns to all overseas travelers with respect to main ports of entry. On average, each overseas traveler visited more than two states.



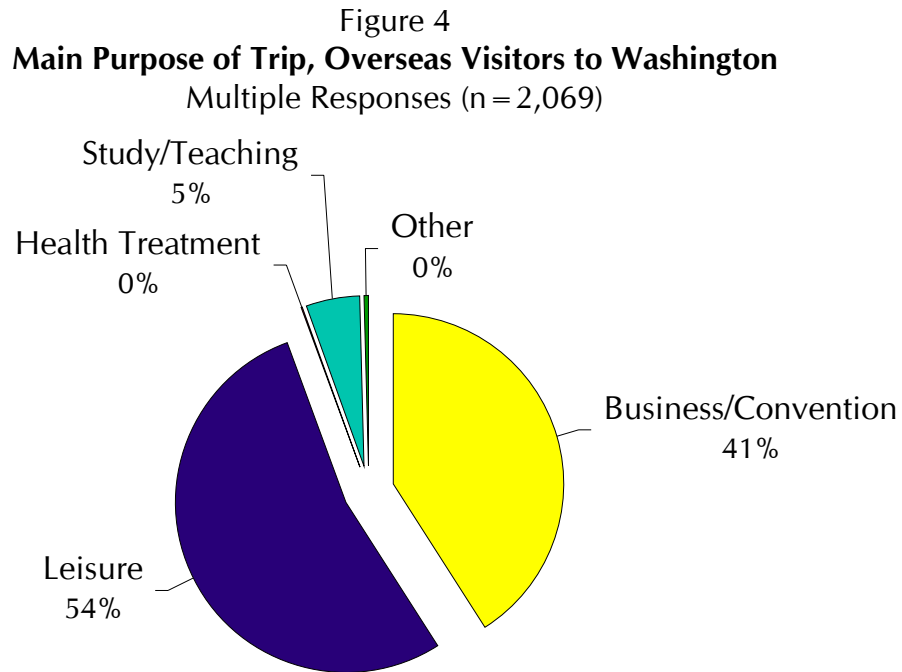
Source: CIC Research, Inc.

## Main Trip Purpose

Almost all overseas travelers (95%) to Washington reported either leisure or business as their main trip purpose (Figure 4). Overall, however, out of all trips made by overseas travelers to Washington in 2004-2006, the percentage of leisure trips was lower compared to the previous reporting period (49% in 2004-2006 versus 56% in 2002-2004).

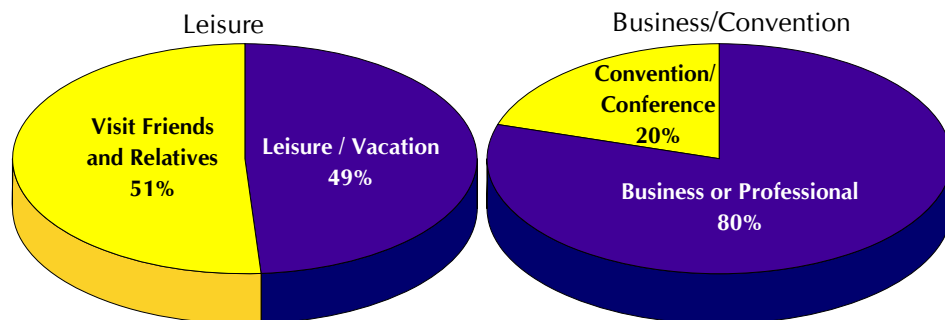
Among leisure overseas travelers, 49% visited Washington on vacation trips and 51% visited friends and relatives during 2004-2006. More leisure overseas travelers visited friends and relatives than in the 2002-2004 reporting period.

Of the non-leisure overseas travelers who identified business/convention as their primary purpose for visiting Washington, the majority did so for business or professional purposes (80%), and another 20% came primarily to attend a convention or conference (Figure 5). These percentages were unchanged from 2002-2004.



Source: CIC Research, Inc.

Figure 5  
**Main Purpose of Trip: Leisure and Business/Convention Travelers to Washington**  
 Multiple Responses, n (leisure) = 1,023; n (business/convention) = 805



Source: CIC Research, Inc.  
 Note: Business/Convention is derived from Non-Leisure by excluding Health Treatment, Study/Teaching and Other categories.

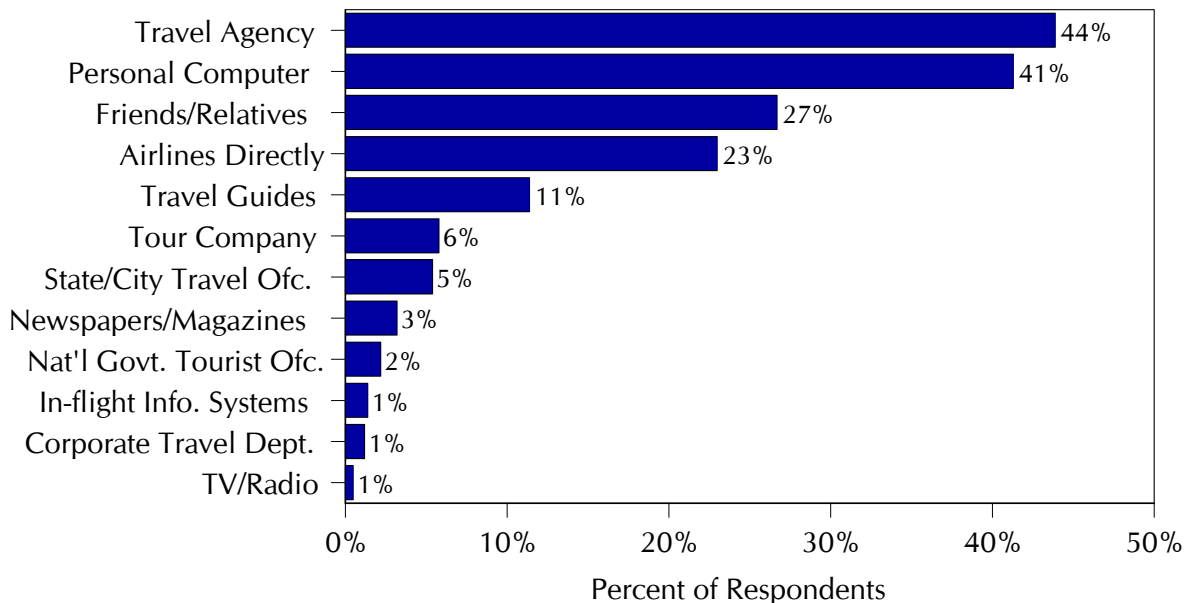
## Information Sources used by Overseas Travelers to Washington

### *Leisure travelers*

Travel agencies remained a primary source of information for almost half (44%) of leisure travelers to Washington during 2004-2006 (Figure 6). However, the use of travel agencies has declined for almost decade, and decreased by 3% during the last three years. The affordability of personal computers and Internet connections has allowed increasing numbers of travelers each year to plan vacations in their own homes without consulting a travel agent. In 2004-2006, over 40% of leisure overseas travelers to Washington used a personal computer for their travel needs. About 27% of leisure overseas travelers relied on friends or relatives to plan their vacations.

The availability of Internet resources, on-line booking and promotions contributed to additional changes in information source preferences. More leisure overseas travelers contacted airlines directly to book their vacations in 2004-2006 (23% versus 19% in 2002-2004). Media sources (newspapers, magazines, travel guides, TV, and radio), government offices and corporate travel departments were used much less in 2004-2006 by leisure travelers.

Figure 6  
**Leisure Travel to WA Information Sources**  
Multiple Responses (n = 1,014)



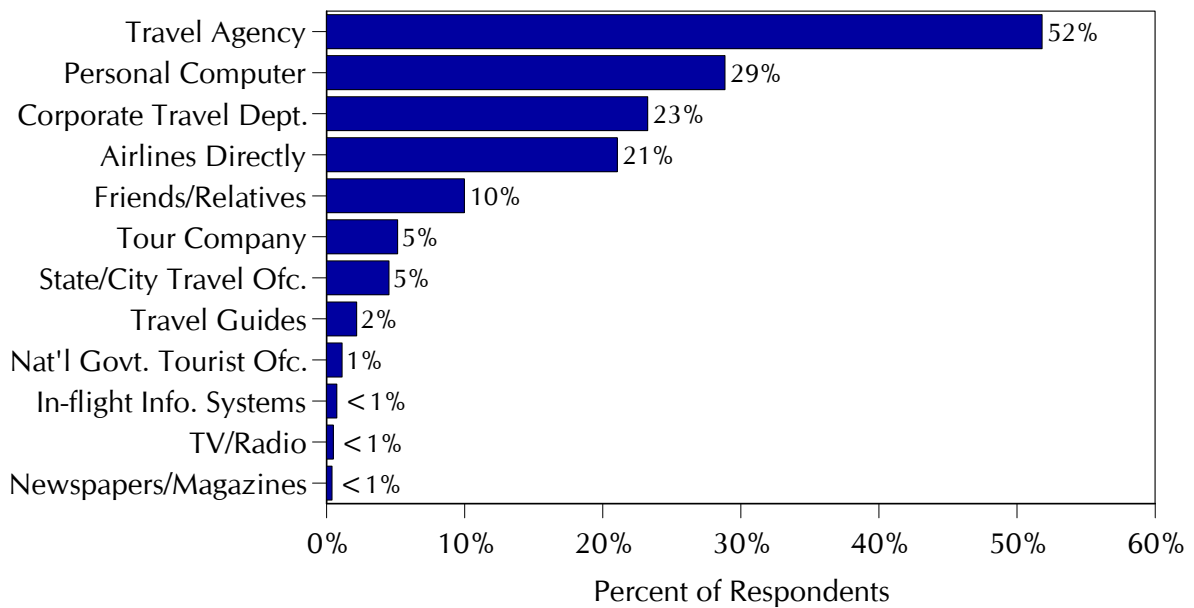
Source: CIC Research, Inc.

### *Non-Leisure travelers*

Travel agencies were also the most common source of information for non-leisure overseas travelers: 52% of non-leisure travelers during 2004-2006 reported using a travel agency (see

Figure 7). Personal computers were used more often to plan business and other non-leisure trips to the United States. Both non-leisure and leisure travelers were also more likely to contact the airlines directly to plan trips.

Figure 7  
**Non-Leisure Travel to WA Information Sources**  
 Multiple Responses (n = 1,037)

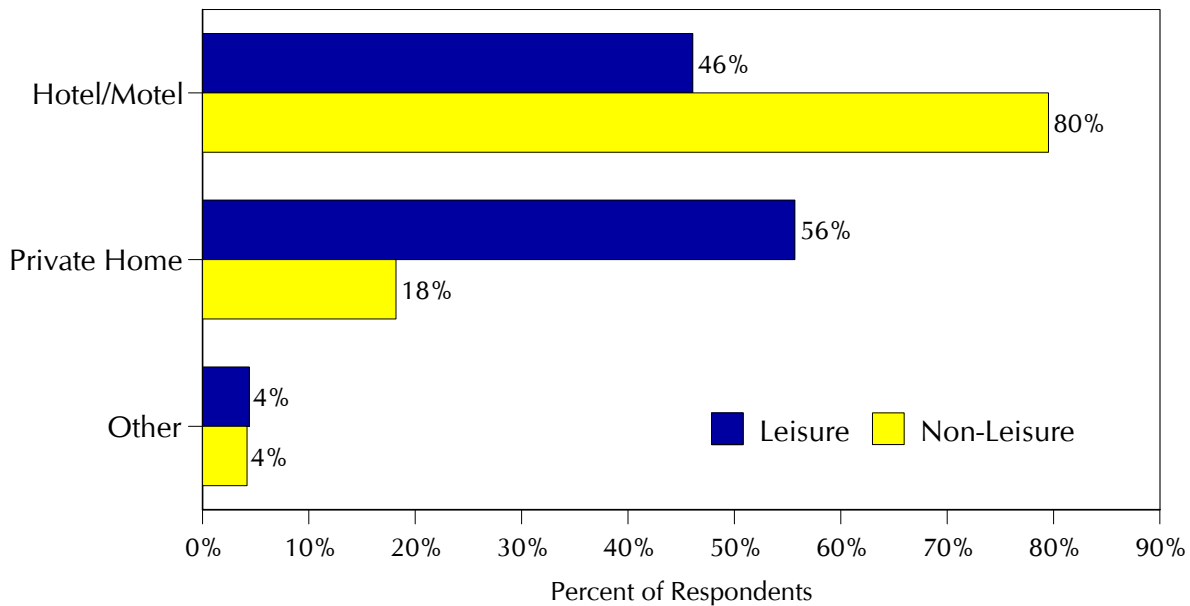


Source: CIC Research, Inc.

## Accommodations

About 62% of all overseas travelers stayed in a hotel/motel during their trip to Washington during 2004-2006, 38% stayed at a private home and about 4% used other types of lodging. Leisure travelers were more likely to stay at a private home than in a hotel/motel in 2004-2006 when compared with the previously reported period. In 2002-2004, almost equal percentages of leisure travelers stayed at a private home (50%) or in a hotel/motel (49%), but in 2004-2006 an almost 10% difference in those percentages was reported (56% for private home versus 46% for hotel/motel; see Figure 8). Most non-leisure overseas travelers (80%), dominated by business travelers, preferred to stay at commercial lodging during their trip.

Figure 8  
**Type of Accommodations, Leisure and Non-Leisure Travelers to WA**  
 n (leisure) = 826; n (non-leisure) = 876



Source: CIC Research, Inc.

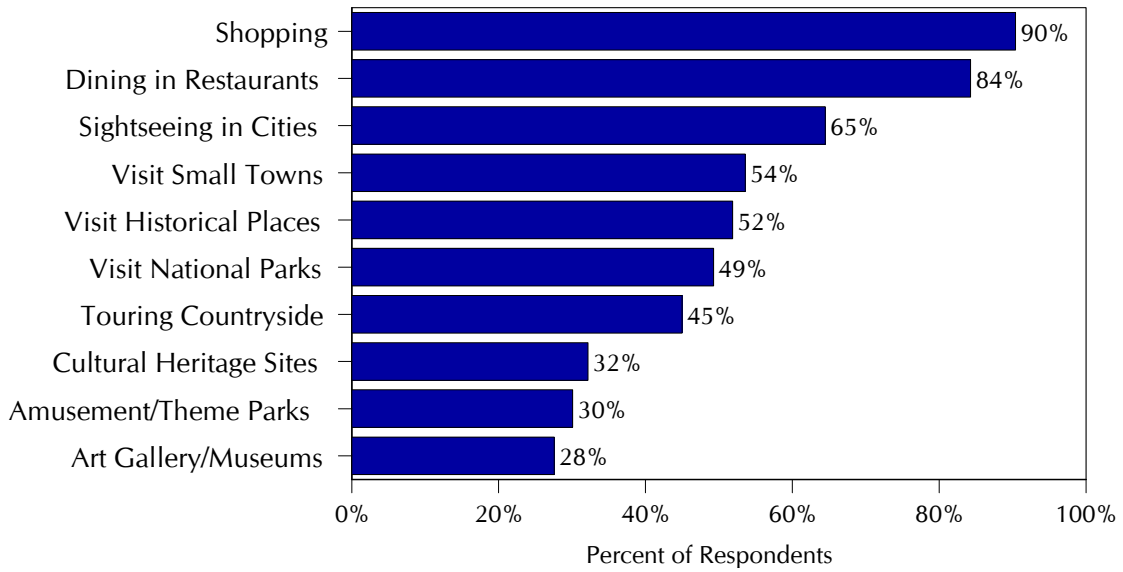
## Activities

Shopping and dining in restaurants remained the most popular activities of both leisure and non-leisure travelers during 2004-2006. Leisure travelers tend to spend more time in a variety of activities, particularly those that may require additional travel from the port of entry (such as other small cities, historical places, national parks and cultural heritage sites). Non-Leisure travelers, who traveled predominantly for business purposes, did not generally spend time on activities outside of their primary destination. A complete list of activities for both leisure and business travelers can be found in Table 7. Since on average each overseas traveler to Washington visited more than one state, some activities on this list may have occurred outside Washington.

### *Leisure travelers*

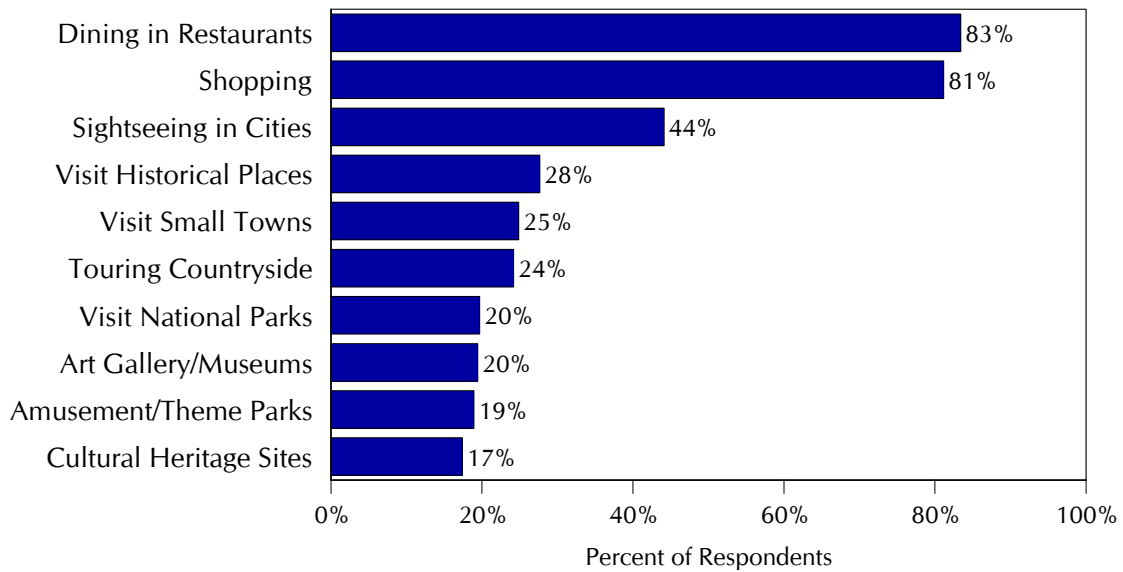
Nine out of ten leisure overseas visitors did some shopping and eight out of ten dined in restaurants during their vacation trips to Washington. Besides dining and shopping, almost two-thirds of leisure travelers had time to do sightseeing in cities. See Figure 9. Nearly half also reported visiting small towns, historical places and national parks during their trip. Art galleries and museums were visited by 28% of leisure overseas travelers. The top ten activities as shown below remained essentially the same as they were in 2002-2004, with changes of 2-4%.

Figure 9  
**Top Ten Activities, Leisure Travelers to WA**  
 Multiple Responses (n = 964)



Source: CIC Research, Inc.

Figure 10  
**Top Ten Activities, Non-Leisure Travelers to WA**  
 Multiple Responses, n = 969



Source: CIC Research, Inc.

*Non-leisure travelers*

Non-leisure overseas travelers generally participate in relatively few activities during their trips. Eight of ten non-leisure travelers dined in restaurants and/or shopped. See Figure 10. Sightseeing in cities was reported by 44% of non-leisure travelers. Fewer than 30% of non-leisure travelers participated in any other top activity.

Table 7  
**Activities, Leisure and Non-Leisure Travelers to WA**  
 Multiple Responses, n (leisure) = 964; n (non-leisure) = 969

	<b>Leisure</b>	<b>Non-Leisure</b>
Shopping	90.40%	81.20%
Dining in Restaurants	84.30%	83.40%
Sightseeing in Cities	64.50%	44.10%
Visit Small Towns	53.60%	24.90%
Visit Historical Places	51.90%	27.70%
Visit National Parks	49.30%	19.70%
Touring Countryside	45.00%	24.20%
Cultural Heritage Sites	32.20%	17.40%
Amusement/Theme Parks	30.10%	19.00%
Art Gallery/Museums	27.60%	19.50%
Guided Tours	21.70%	16.30%
Camping/Hiking	18.30%	7.60%
Cruises	14.90%	5.30%
Casinos/Gambling	14.40%	10.10%
Concert/Play/Musical	13.80%	8.20%
Nightclubs/Dancing	13.70%	10.30%
Water Sports/Sunbathing	13.60%	9.30%
Sports Event	13.10%	10.30%
Visit Am. Indian Comm.	9.10%	2.00%
Ethnic Heritage Sites	8.40%	2.20%
Eco. Excursions	7.50%	4.70%
Golfing/Tennis	6.00%	11.10%
Snow Skiing	5.00%	2.60%
Ranch Vacations	4.00%	2.90%
Hunting/Fishing	2.00%	3.30%

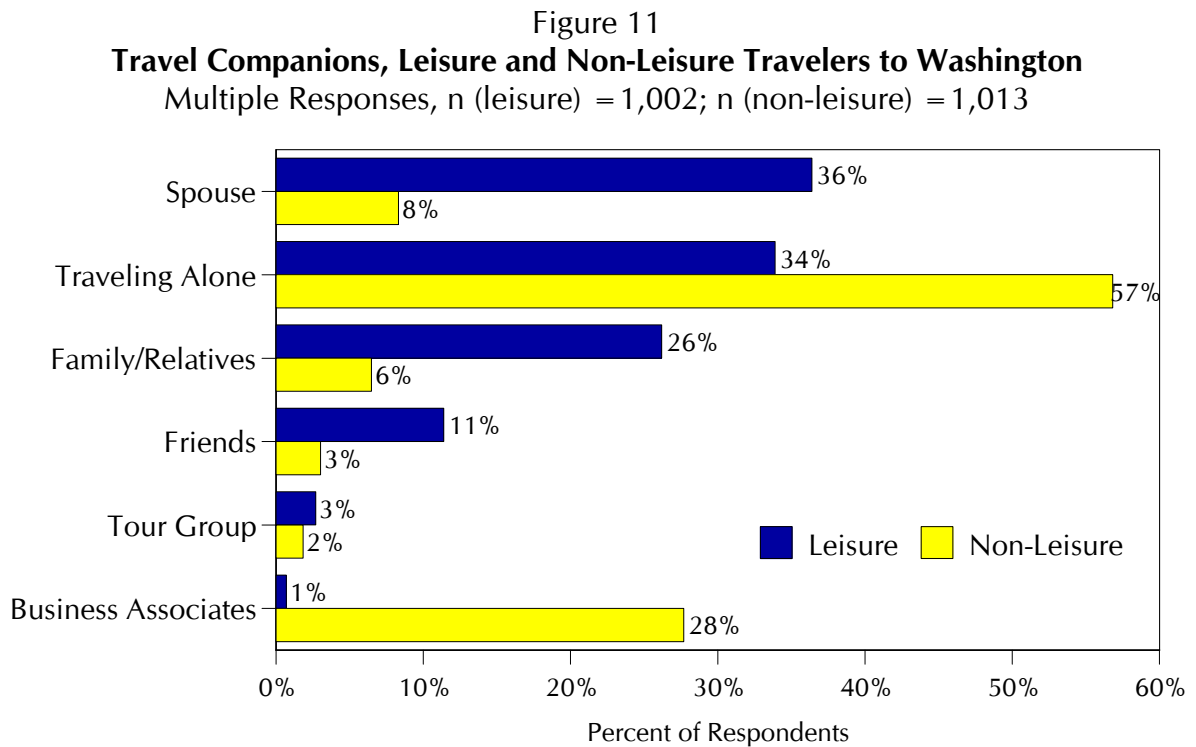
Source: CIC Research, Inc.

Note: Some activities on this list may be located outside Washington.

## Travel Parties

More leisure travelers were accompanied by a spouse in 2004-2006 than in 2002-2004, (36% versus 32%). See Figure 11. The percentage of solo leisure travelers (34%) did not change from the previous survey. Fewer leisure travelers visited Washington with other family members or relatives in 2004-2006 than in 2002-2004 (26% versus 31%). Tour groups represented about 3% of leisure trips.

Over 80% of non-leisure travelers to Washington during 2004-2006 were alone or accompanied by a business associate. See Figure 11. About 8% of non-leisure travelers were accompanied by a spouse. Friends or other family members traveled with 9% of respondents on non-leisure trips.



Source: CIC Research, Inc.

Other data, not shown, indicate that a majority of leisure visitors (92%) traveled without children – an increase of 2% over 2002-2004. The average total party size for leisure visitors to Washington was 1.6 during 2004-2006, slightly lower than 1.7 in 2002-2004. The average party size for leisure visitors traveling with children decreased from 3.7 in 2002-2004 to 3.5 in 2004-2006. Over 98% of non-leisure visitors traveled without children.

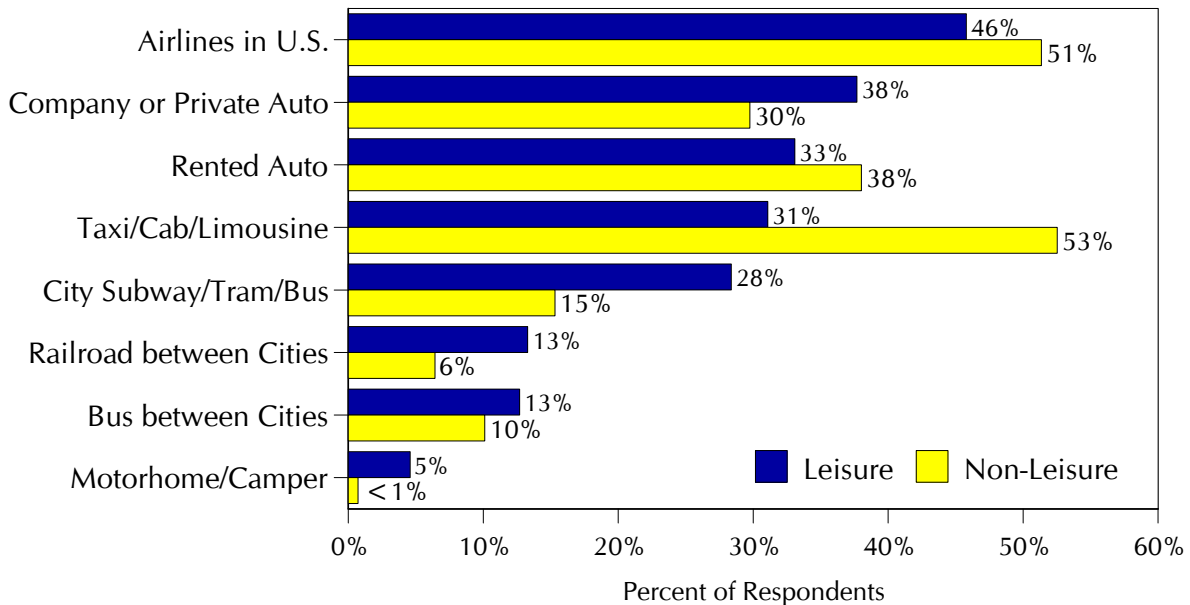
## Mode of Transportation

Airlines remain the most frequently used mode of transportation for leisure visitors traveling within the United States. The percentage of leisure travelers who flew between destinations during their trips has remained consistent at 46% since 2002-2004. See Figure 12.

Significantly fewer leisure travelers opted to rent a car during their trips to the United States (33% in 2004-2006 versus 40% in 2002-2004); likely a result of the higher gasoline prices in the past few years. Among leisure travelers, buses and railroads were a popular means of ground transportation between cities, while within cities, public transportation and taxis were frequently used.

Over half of non-leisure travelers (51%) flew during their trips and/or took a taxi to get around cities in the United States. Rented autos continue to be a very important method of transportation for non-leisure travelers: 38% said that they rented a car during their trip.

Figure 12  
**Transportation Mode, Leisure and Non-Leisure Travelers to Washington**  
 Multiple Responses, n (leisure) = 923; n (non-leisure) = 972



Source: CIC Research, Inc.

## Travel in the United States

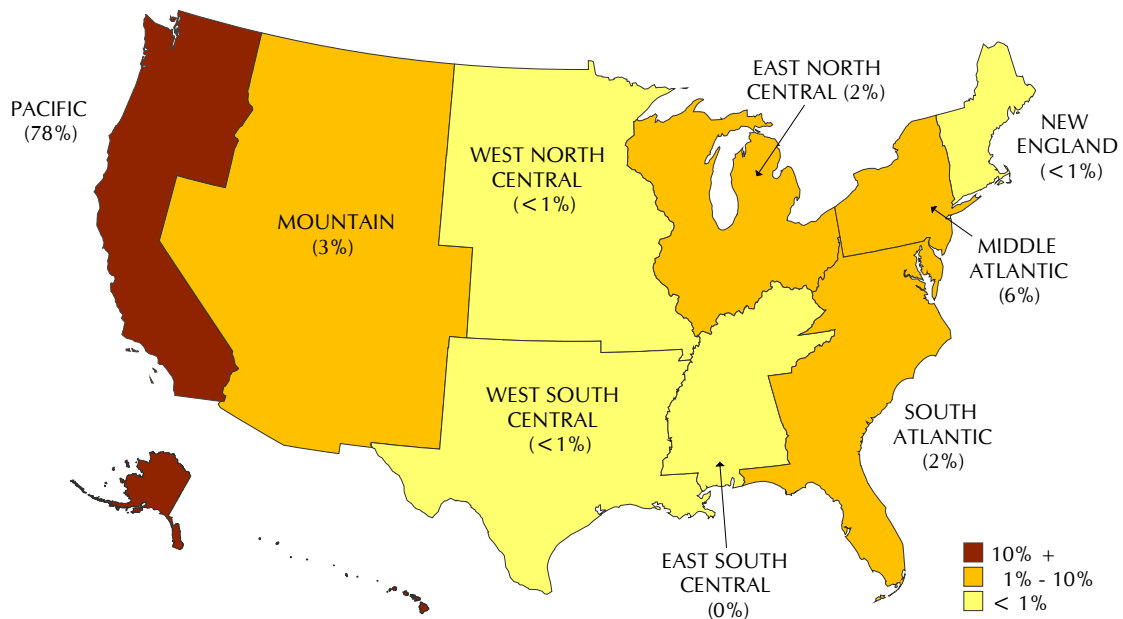
### Main Destination

A majority (93%) of all overseas travelers to Washington in 2004-2006 designated the US as their main destination. The remaining 7% were transient travelers en route to a different international destination, primarily to Canada. One in ten leisure travelers did not have a main destination within the United States. Non-leisure travelers were more likely to stay

within the United States during their trips; only 2% of non-leisure travelers visited any other international location. The overall length of stay in the United States in 2004-2006 was 23 nights. The overall number of nights spent at the destination averaged 10.

Nearly 80% of overseas travelers to Washington in 2004-2006 spent most of their trips in the Pacific Region (Figure 13). This percentage has not changed from 2002-2004. Washington continues to attract the majority of overseas travelers in the Pacific Region, (81% in 2004-2006 versus 74% in 2002-2004), followed by California, a second primary destination both in the Pacific Region and in the United States. During the past few years, approximately 7-8% of overseas travelers to Washington have alternated their primary destination between Washington and California each reported period. Consequently, in 2002-2004 California gained 8% of overseas visitors at Washington’s loss, and in 2004-2006 Washington increased its share by 7% at California’s loss.

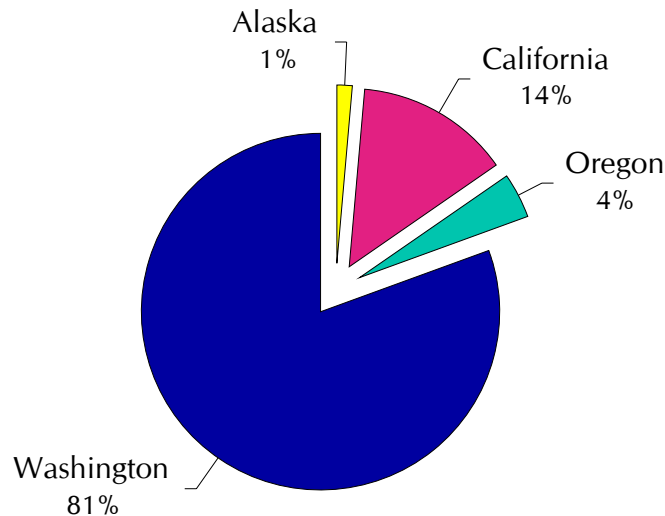
Figure 13  
**Main Destination by U.S. Regions**  
 All Overseas Visitors to WA, n = 1,465



The number of overseas travelers headed to Alaska or Oregon through Washington has not changed proportionally in any significant way over past three years. See Figure 14.

Travel to each other region in the United States counted for less than 6% of overseas travelers to Washington, led by the Middle Atlantic Region. No visitors to Washington reported travel to the East South Central region in 2004-2006.

Figure 14  
Main Destination, Pacific Region Only  
All Overseas Visitors to WA, n = 1,140



Source: CIC Research, Inc.

Leisure travelers were more likely to choose a main destination outside of the Pacific Region than were non-leisure travelers: 24% of leisure travelers versus 20% of non-leisure travelers explored other parts of the United States in addition to the Pacific Region.

#### *Other U.S. Destinations Visited*

Nearly 20% of overseas travelers to Washington in 2004-2006 visited either the Middle Atlantic or Mountain regions in addition to the Pacific Region. See Figure 15. Three of four travelers who visited the Middle Atlantic region stopped in New York City. Similarly, Las Vegas was the major destination within the Mountain Region, with 10% of overseas visitors.

The Mountain region attracted a larger percentage of overseas visitors in 2004-2006, mostly due to an increase in Las Vegas visitation. The New England region, with Boston as a major destination city, lost 2% of overseas travelers to Washington during the past three years. Among all major cities visited, Seattle led overwhelmingly with nine of ten overseas travelers counting it as part of their trips in 2004-2006. See Figure 16. California's major cities (San Francisco and Los Angeles) still attract a significant percentage of overseas travelers, about 20% each.

Figure 15  
**U.S. Regions Visited, Other than Pacific**  
 All Overseas Visitors to WA, Multiple Responses, n = 2,074

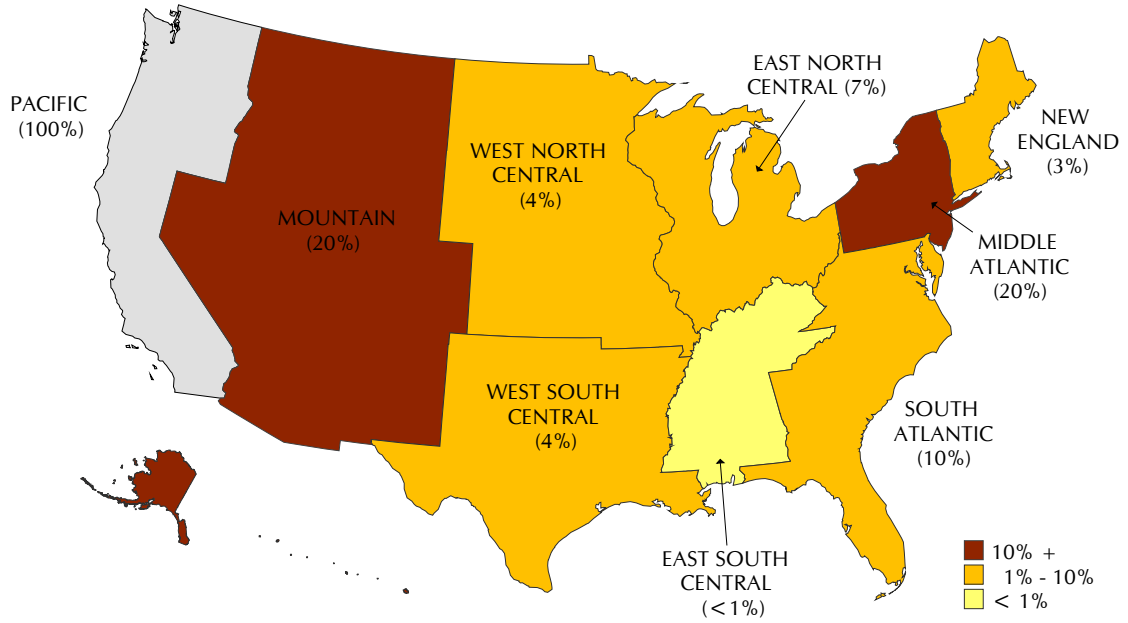
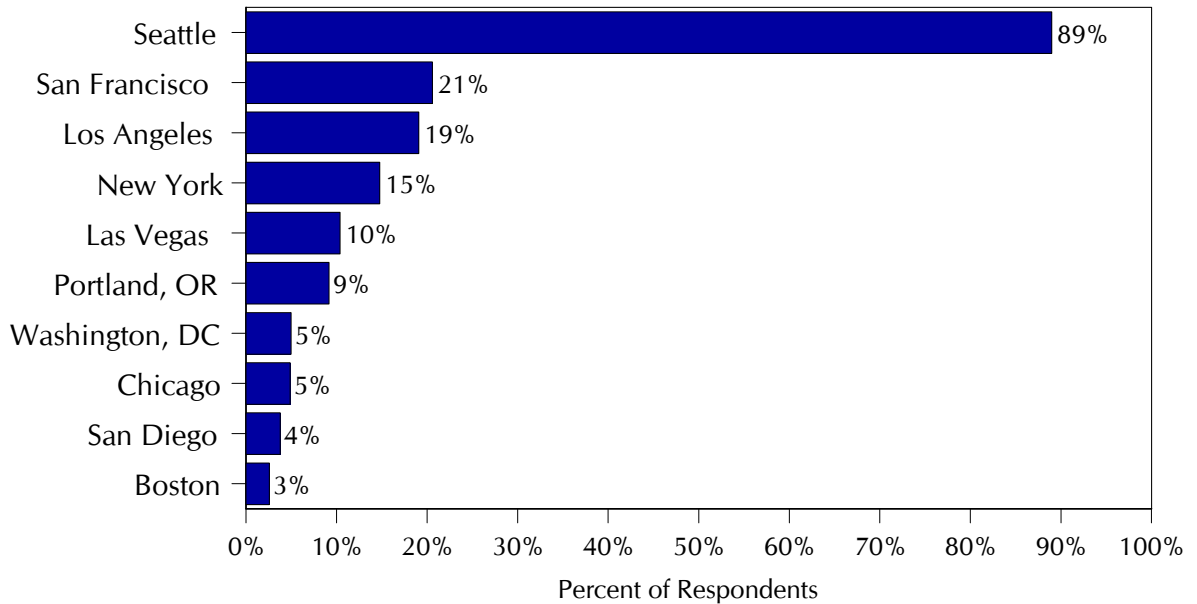


Figure 16  
**Cities Visited, All Overseas Visitors to Washington**  
 Multiple Responses, n = 2,074



Source: CIC Research, Inc.

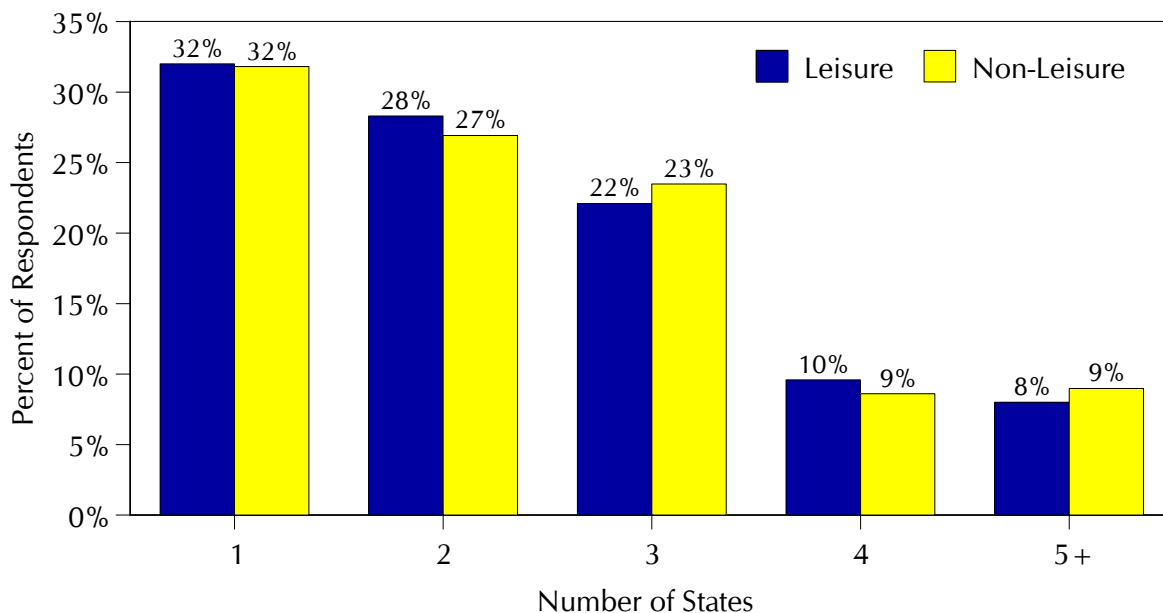
### Other States Visited

Only a third of overseas travelers came to the state of Washington as an exclusive destination. However, there was an increase in the number of leisure visitors who visited Washington exclusively on their trip, 32% in 2004-2006 versus 27% in 2002-2004. About half of overseas travelers visited two or three states during their trip, and about 18% traveled to more than three states. The number of states visited was not significantly different between leisure and non-leisure travelers. See Figure 17.

Among all other states, California and Oregon attracted over half of Washington's overseas visitors. The distribution of overseas travelers to Washington among states in the Pacific Region did not change significantly over the past three years. California remains the secondary destination after Washington with 41% of Washington's overseas visitors. See Figure 18.

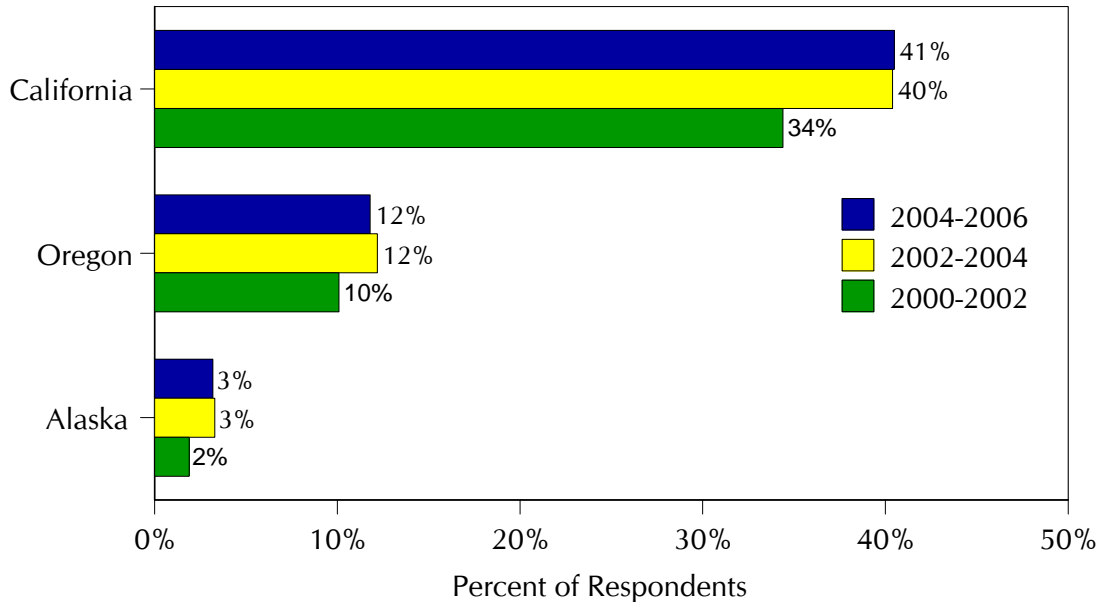
As shown in Figure 19, overseas travelers to Washington also traveled to other states in the Pacific Region, Nevada (mostly because of Las Vegas) and New York, with New York City as a primary attraction. In comparison, the most popular states among all overseas travelers to the United States were California, New York, Florida, Hawaii and Nevada. See Figure 20.

Figure 17  
**Number of States Visited by overseas visitors to WA**  
n (leisure) = 1,023; n (non-leisure) = 1,051



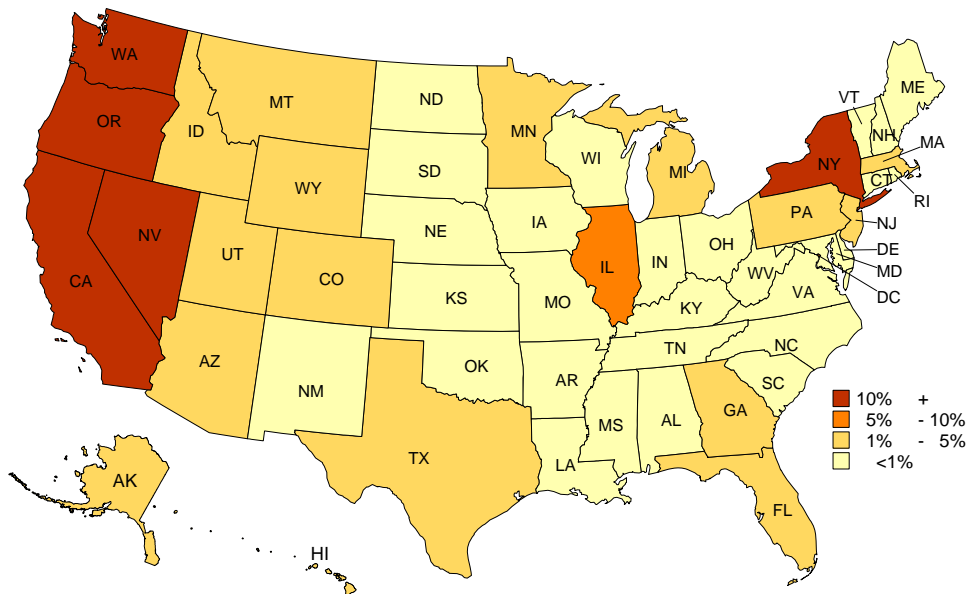
Source: CIC Research, Inc.

Figure 18  
**Pacific Region States Visited**  
 All Overseas Visitors to WA, Multiple Responses, n = 2,074



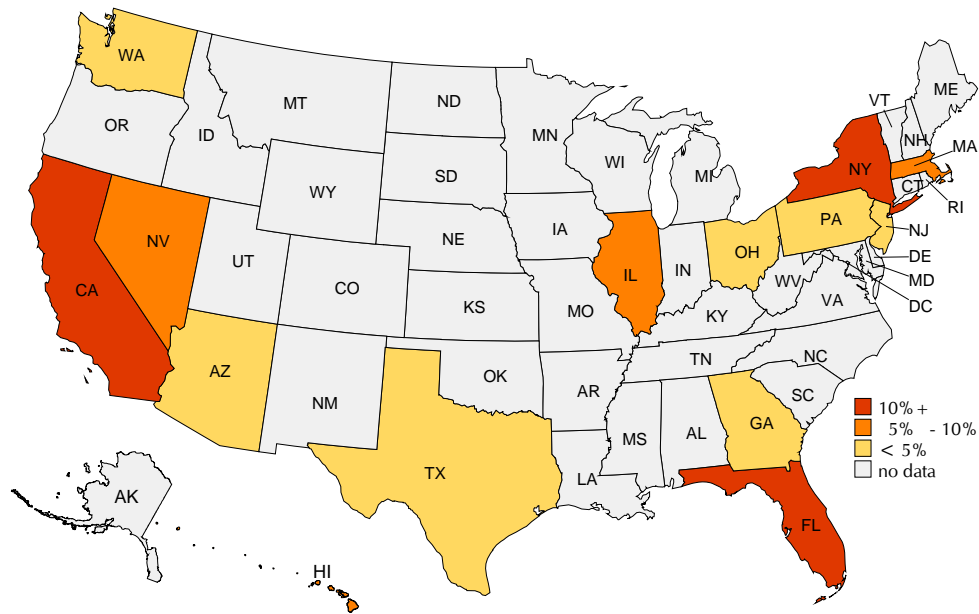
Source: CIC Research, Inc.

Figure 19  
**States Visited – Market Share (%)**  
 All Overseas Visitors to WA (2004-2006),  
 Multiple Responses (n = 2,074)



Source: CIC Research, Inc., Dean Runyan Associates, Inc.

Figure 20  
**States Visited – Market Share (%)**  
 All Overseas Visitors to the United States, 2006



Note: Only city destinations with a sample size of 400 or more are displayed with data.  
 Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries.

## Demographics

### Age

The average age of overseas leisure travelers to Washington in 2004-2006 increased slightly to 44 years for males (2 years older than in 2002-2004) and 41 years for females (1 year older than in 2002-2004). About a third of male and a quarter of female overseas leisure travelers were older than 55 in 2004-2006, and those percentages were higher (7% higher for males and 4% for females) than in 2002-2004. This increase was mostly due to an increase in the number of international travelers among active seniors aged 55-64. Women younger than 35 continued to travel to Washington for leisure purposes nearly twice as often as did men of the same age bracket (42% versus 24% in 2002-2006). See Figure 21.

Non-Leisure male overseas travelers to Washington were more likely to be middle-aged, with the highest percentage (18%) at the age of 40-44. See Figure 21. Twenty percent of women who traveled to Washington for non-leisure purposes in 2004-2006 were older than age 55 but younger than 65. Only 1% of non-leisure overseas travelers were older than 65.

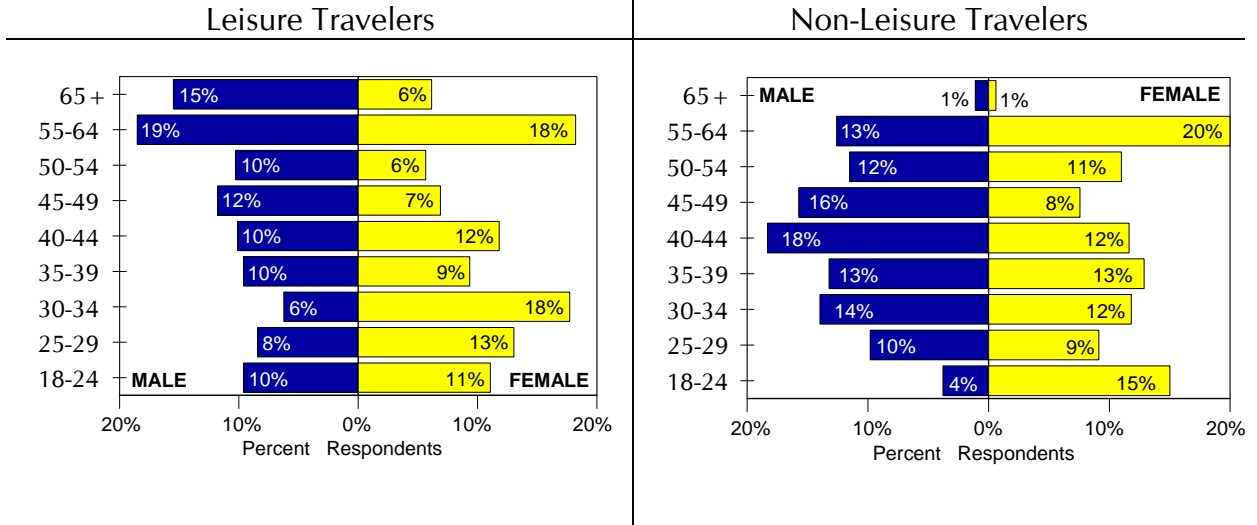
### Occupation

Similar to 2002-2004, more than 50% of overseas leisure travelers to Washington worked in a professional/technical field or held managerial/executive positions during 2004-2006. See Figure 22. About 14% of visitors were retirees on vacation.

Among non-leisure travelers to Washington, most (83%) were employed in managerial/ executive or professional/technical positions. Eight percent of non-leisure travelers were students and another 3% were sales representatives.

Figure 21  
**Age by Gender, Overseas Travelers to Washington**

n (leisure) = 937; n (non-leisure) = 987

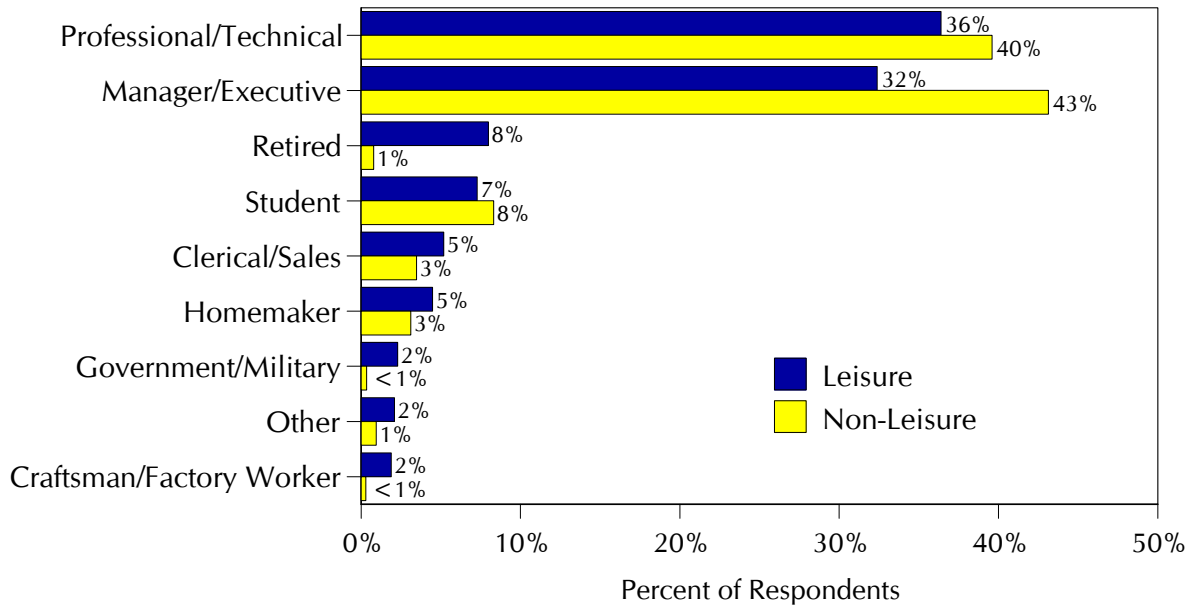


Note: Percentages within each gender add to 100.

Source: CIC Research, Inc.

Figure 22  
**Occupation, Overseas Travelers to Washington**

Leisure vs. Non-Leisure; n (leisure) = 968; n (non-leisure) = 1,006



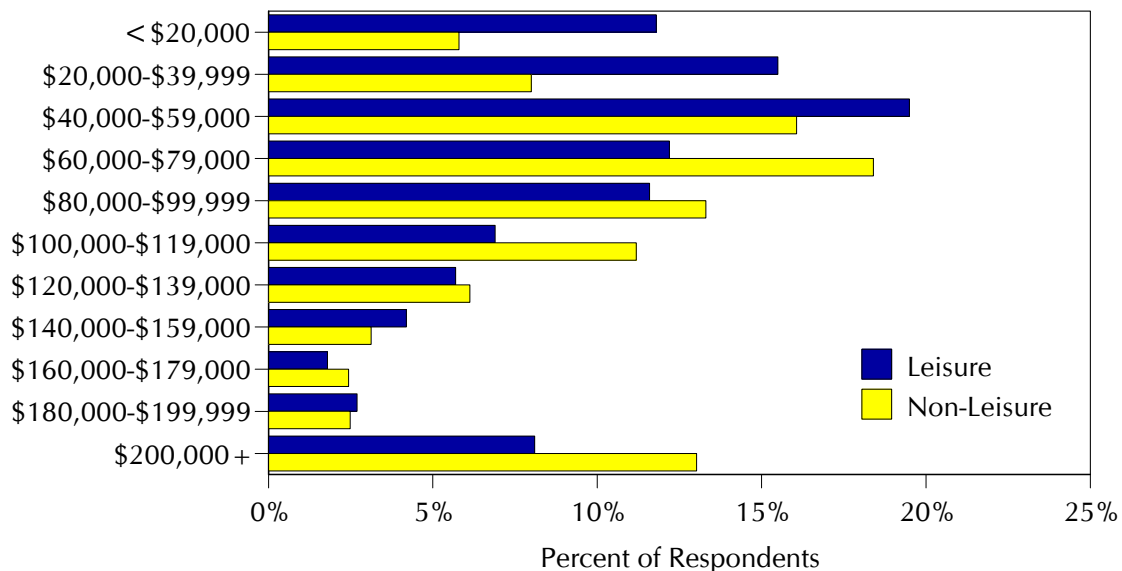
Source: CIC Research, Inc.

## Income

The average annual household income of overseas leisure travelers to Washington has increased every three-year period and was another \$20,000 higher in 2004-2006 (\$81,100 versus \$61,900 in 2002-2004 and \$49,200 in 2000-2002). As shown in Figure 23, in 2004-2006 more than half of leisure travelers (53%) had incomes of more than \$60,000 per year, and one in ten overseas leisure visitors to Washington earned more than \$180,000 per year. Nearly a third of overseas leisure travelers had annual income between \$20,000 and \$60,000. Among the selected target markets, the most affluent overseas travelers to Washington during 2004-2006 (with incomes of \$200,000 and higher) came from the United Kingdom, Hong Kong/China and France.

In general, non-leisure overseas travelers to Washington had higher salaries than did leisure travelers, almost 70% of them earned at least \$60,000 per year. Over 40% of non-leisure travelers earned between \$60,000 and \$120,000 per year. A significant percent (13%) of non-leisure travelers earned a salary of \$200,000 or more per year during 2004-2006. Non-leisure travelers were less likely to have a low income than were leisure travelers.

Figure 23  
**Annual Household Income, Overseas Travelers to Washington**  
Leisure vs. Non-Leisure; n (leisure) = 843; n (non-leisure) = 914



Source: CIC Research, Inc.

## Expenditures

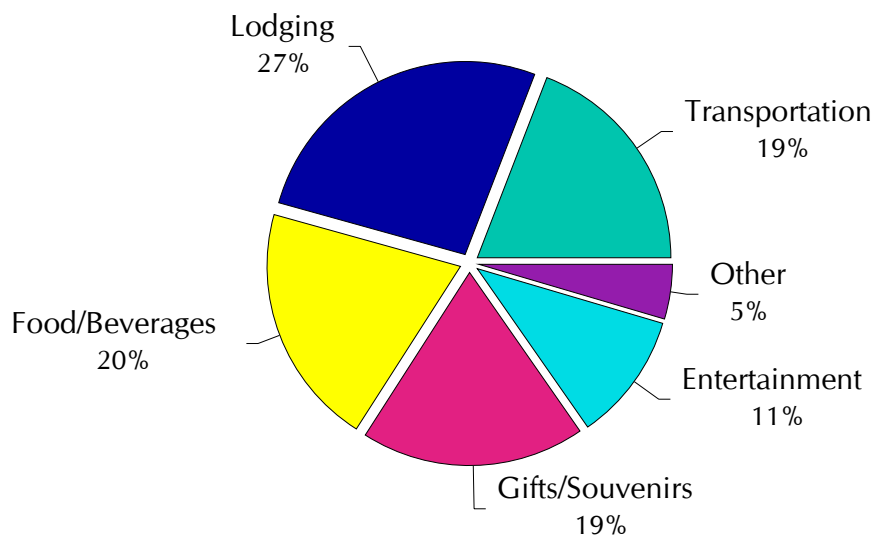
### Leisure Travelers

Trip expenditures within the United States for a typical overseas leisure visitor to Washington increased by nearly \$300 compared to 2002-2004, averaging \$1,928 per visitor per trip in 2004-2006. As a result, average daily expenditures per leisure travelers increased by \$13 to \$86 in 2004-2006. Lodging remains the most expensive item with 27%

of all expenditures spent on overnight stays in 2004-2006. See Figure 24. The percentage of trip expenditures attributable to lodging increased by 4%, and average daily lodging expenditures per leisure traveler increased by nearly 40% in 2004-2006 (\$504 versus \$365 in 2002-2004).

Overseas leisure travelers spent less money on gifts/souvenirs in 2004-2006 (19% versus 21% in 2002-2004). See Figure 24. Food/beverages (20%) and transportation within the United States (19%) still accounted for significant portions of total trip expenses for overseas leisure travelers in 2004-2006.

Figure 24  
**Trip Expenditures in U.S., Per Visitor/Trip**  
Overseas Leisure Travelers to WA, n = 689

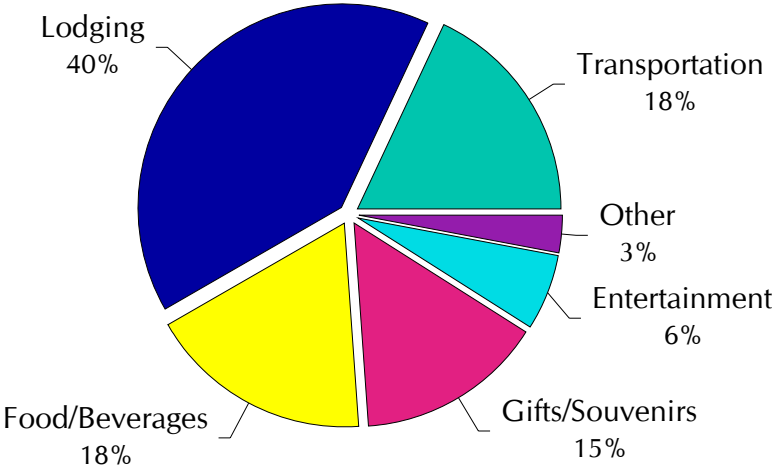


Source: CIC Research, Inc.

### *Non-Leisure Travelers*

Generally, overseas non-leisure travelers to Washington spent \$330 more per trip than did leisure travelers. Daily expenditures of non-leisure travelers were \$99, or \$13 higher than those of leisure travelers in 2004-2006. As shown in Figure 25, non-leisure travelers spent much more on lodging (40% of all trip expenditures) and considerably less on entertainment (6%) and gifts/souvenirs (15%) than did leisure travelers to Washington.

Figure 25  
**Trip Expenditures in U.S., Per Visitor/Trip**  
Overseas Non-Leisure Travelers to WA, n = 745



Source: CIC Research, Inc.

## Country Reports

This section updates a selection of country reports that represent many of Washington's primary overseas markets. Descriptions of the many other countries whose residents traveled to Washington during 2004-2006 are not included because there are insufficient data in the in-flight database to provide reliable findings. Each country report provides details about travelers and travel characteristics, as well as additional interpretive comments offering insights and comparisons.

The country reports are available for those selected target markets for which the in-flight data are adequate for analysis. Data for the remaining countries (Hong Kong/China, Germany, France and Benelux) is summarized at the end of this section, but should be read and interpreted with caution due to the very small sample sizes. Additionally, extreme caution should be used when distributing this information, and mention of its unreliability due to the very small sample sizes should be provided to the report recipients.

# Australia/New Zealand

- Sample**
  - 344
- Statistics**
  - U.S. visitors 2006: 742,000 combined rank 6<sup>th</sup>
  - Washington visitors 2006: 31,000 (Washington rank 4<sup>th</sup>, market share 8%)
  - Composition: Australia 61%, New Zealand 39%
- Profile**
  - Have previously visited the U.S.: 66%
  - Main ports of entry: Los Angeles 56%, San Francisco 25%
  - Main destinations visited: Washington 44%, California 13%, Canada 10%
  - Average number of states visited: 2.7
  - Other states visited: California 58%, Nevada 16%, New York 14%, Oregon 9%
  - Main purpose of trip: leisure 72%, business 26%, other 2%
  - Type of accommodation: hotel/motel 53%, private home 49%, other 2%
  - Average length of stay in the U.S.: 21 nights
  - Travel party composition: adults 92%, with children 8%
  - Average party size: 1.6 people
  - Average age: men 46, women 46
  - Average expenditure in U.S.: \$3,269 per party per trip; \$2,016 per visitor per trip, \$95 per visitor per day
  - Average annual household income: \$82,300
- Insights**
  - Nearly 63% used a travel agency as an information source, 35% used a personal computer and 21% relied on friends/relatives
  - High percentage used travel agents to book air trip (65%)
  - Had the longest trip planning time (142 days in advance)
  - The highest percentage used travel packages (22%) particularly air/lodging and guided tours
  - The highest percent of visitors who traveled in tour groups (11%)
  - More likely to stay with friends or family (49%) and least likely to stay in hotel/motel (53%)
  - The highest number of travelers (34%) to visit the United States for the first time
  - The least likely to visit only one state
  - Together with France, the least likely to report Washington as their main U.S. destination (44%)
  - The most likely to rely on air (62%) and city public transportation (31%) to travel within U.S.
  - The majority (81%) used California's ports of entry (Los Angeles-65%); only 3% arrived via Seattle
  - The most likely to visit an historic place (53%), an amusement park (37%), a sporting event (18%), use a guided tour (33%) or cruise trip (20%), and to enjoy snow skiing (12%)
  - The highest expenditures on entertainment in the U.S. (\$432 per party)
  - The most expensive international airfare (\$2,350 per visitor per trip)

# Japan

## Sample

- Leisure 144, Non-Leisure 181

## Statistics

- U.S. visitors 2006: 3,673,000 (rank 2<sup>nd</sup>)
- Washington visitors 2006: 62,000 (Washington rank 1<sup>st</sup>, market share 16%)

## Profile

### *Leisure Travel*

- Previously visited the U.S.: 79%
- Main ports of entry: Seattle 68%, San Francisco 11%, Los Angeles 7%
- Main destinations: Washington 54%, Canada 13%, New York 11%, California 10%
- Average number of states visited: 1.9
- Other states visited: California 24%, Oregon 15%, New York 14%, Nevada 9%
- Type of accommodation: hotel/motel 71%, private home 34%
- Average length of stay in the U.S.: 14 nights
- Travel party composition: adults 84%, with children 16%
- Average party size: 1.7 people
- Average age: men 45, women 42
- Average expenditure in U.S.: \$2,157 per party per trip; \$1,285 per visitor per trip, \$91 per visitor per day
- Average annual household income: \$102,200

### *Non-Leisure Travel*

- Previously visited the U.S.: 90%
- Main ports of entry: Seattle 60%, Los Angeles 11%, San Francisco 8%
- Main destinations: Washington 67%, Oregon 8%, California 7%
- Average number of states visited: 2.1
- Other states visited: California 35%, Oregon 11%, New York 9%
- Type of accommodation: hotel/motel 94%, private home 6%
- Average length of stay in the U.S.: 11 nights
- Travel party composition: adults 100%, with children 0%
- Average party size: 1.3 people
- Average age: men 45, women 43
- Average expenditure in U.S.: \$2,682 per party per trip; \$1,908 per visitor per trip, \$165 per visitor per day
- Average annual household income: \$106,606

## Insights

### *Leisure Travel*

- Preferred to book an air trip through airlines directly (19%), similar to Hong/Kong/China travelers
- More likely to rely on a personal computer (61%) and a travel agency for travel information, the second highest (9%) after Australia/New Zealand in using tour companies as an information source
- High percentage used packages, particularly air/lodging (14%)
- The highest percentage that pre-booked lodging directly through hotel/motel (26%)
- High percentage traveled in company of a spouse or other relatives (67%) and/or with children (16%)
- High percentage (71%) stayed in hotel/motel
- Nearly 80% visited only one or two states
- High percent used city's public transportation (35%) or traveled by railroad (22%) within U.S.
- Lowest average expenditures in U.S. (\$1,285 per visitor/per trip). Among other primary markets, spent least on lodging (\$391), transportation within U.S. (\$194) and food/beverages (\$220) per visitor/per trip
- The highest percent to occupy clerical/sales (7%) and government/military (6%) positions or to be homemakers (11%)

### *Non-Leisure Travel*

- High percentage of travelers (23%), similar to France, booked an air trip through a company travel department
- More likely to use a package with tour (5%) or book a guided tour (6%)
- Majority (92%) pre-booked their lodging, mostly through either a business associate (27%) or a travel agent (22%)
- The highest percentage of adults who traveled alone (85%)
- High percentage (25%) traveled primarily to attend a convention or a conference
- More likely to have traveled to the U.S. more than once over the last 12 months: 2-3 trips (34%) and 4-5 trips (18%)
- More likely to visit Oregon (8%) and Illinois (5%) as a main destination; fewer than 1% of leisure travelers traveled primarily to those states

## South Korea

- Sample**
- 233
- Statistics**
- U.S. visitors 2006: 758,000 (rank 5<sup>th</sup>)
  - Washington visitors 2006: 39,000 (Washington rank 3<sup>rd</sup>, market share 10%)
- Profile**
- Have previously visited the U.S.: 73%
  - Main ports of entry: Seattle 33%, Los Angeles 24%
  - Main destinations: Washington 66%, California 14%, New York 13%
  - Average number of states visited: 2.1
  - Other states visited: California 46%, New York 16%, Washington D.C. 6%
  - Main purpose of trip: leisure 32%, business 49%, study/teaching 19%
  - Type of accommodation: hotel/motel 61%, private home 40%, other 1%
  - Average length of stay in the U.S.: 43 nights
  - Travel party composition: adults 93%, with children 7%
  - Average party size: 1.5 people
  - Average age: men 41, women 40
  - Average expenditure in U.S.: \$3,649 per party per trip; \$2,476 per visitor per trip, \$58 per visitor per day
  - Average annual household income: \$80,200
- Insights**
- The highest percentage to have used travel agents to book air trip (66%)
  - The highest percent of visitors to have traveled with business associates (31%) and the lowest percentage (12%) to be accompanied by a spouse
  - The highest party size (4.0), together with Australia/New Zealand, for travelers with children
  - The highest percent (19%) of visitors who traveled to the U.S. for study/teaching purposes
  - The highest total number of nights in U.S. (43), number of nights in destination (14) and number of nights spent in private home (25)
  - The longest stay in U.S. – 29% spent over 36 nights in U.S.
  - High percent (76%) traveled within the U.S. by car (company, private or rented) and fewer (11%) used city's public transportation
  - The highest percent (21%) to have entered the U.S. through other ports than specified, only 33% arrived via Seattle
  - Less likely to participate in camping/hiking (4%), gambling (8%), nightclub dancing (1%), and dining in restaurants (58%). The highest percent to golf/play tennis (20%) and hunt/fish (10%) during a trip
  - The lowest average daily expenditures in U.S. - \$58 per visitor
  - Second highest (after France) lodging expenses - \$965 per visitor per trip
  - The lowest percent (1%) to fly first class

## Taiwan

- Sample**
- 409
- Statistics**
- U.S. visitors 2006: 300,000 (rank 16<sup>th</sup>)
  - Washington visitors 2006: 18,000 (Washington rank 7<sup>th</sup>, market share 5%)
- Profile**
- Have previously visited the U.S.: 80%
  - Main ports of entry: Seattle 56%, Los Angeles 19%, San Francisco 10%
  - Main destinations: Washington 79%, California 7%
  - Average number of states visited: 1.9
  - Other states visited: California 33%, Nevada 10%, New York 9%
  - Main purpose of trip: leisure 45%, business 50%, other 5%
  - Type of accommodation: hotel/motel 55%, private home 43%, other 4%
  - Average length of stay in the U.S.: 19 nights
  - Travel party composition: adults 94%, with children 6%
  - Average party size: 1.5 people
  - Average age: men 40, women 37
  - Average expenditure in U.S.: \$3,278 per party per trip; \$2,129 per visitor per trip, \$112 per visitor per day
  - Average annual household income: \$74,500
- Insights**
- Had the shortest trip planning time (42 days) and the shortest airline reservation time (22 days)
  - Low percent (23%) to use a personal computer as an information source
  - Majority of business visitors (84%) traveled for business purposes other than convention or conference
  - High average stay in hotel/motel - about a week
  - The highest percentage to visit only one state (45%) and only one destination (41%)
  - The highest percentage (44%) to use a company or private auto to travel within the United States
  - More than half (56%) arrived via Seattle
  - The highest number of visitors (79%) who traveled to Washington as a primary destination
  - The lowest percent to visit an art gallery/museum (18%) or tour the countryside (19%)
  - The highest spending on gifts and souvenirs in the U.S. (\$479 per visitor/per trip)
  - The highest percentage of travelers (43%) employed in a professional/technical field
  - The lowest average annual income -\$74,500

## United Kingdom

- Sample**
- 155
- Statistics**
- U.S. visitors 2006: 4,176,000 (rank 1<sup>st</sup>)
  - Washington visitors 2006: 54,000 (Washington rank 2<sup>nd</sup>, market share 14%)
- Profile**
- Have previously visited the U.S.: 82%
  - Main ports of entry: Seattle 39%, Chicago 16%, Newark 14%
  - Main destinations: Washington 70%, California 10%, New York 8%
  - Average number of states visited: 2.4
  - Other states visited: California 38%, New York 21%, Nevada 13%, Oregon 12%, Florida 7%
  - Main purpose of trip: leisure 66%, business 29%, other 5%
  - Type of accommodation: hotel/motel 59%, private home 43%, other 7%
  - Average length of stay in the U.S.: 20 nights
  - Travel party composition: adults 98%, with children 2%
  - Average party size: 1.4 people
  - Average age: men 44, women 46
  - Average expenditure in U.S.: \$2,828 per party per trip; \$1,983 per visitor per trip, \$99 per visitor per day
  - Average annual household income: \$109,300
- Insights**
- The lowest percent (32%) of travelers using a travel agent to book an air trip
  - The second highest (after Benelux) to use a personal computer as an information source (43%) and to buy air tickets (28%)
  - Majority (92%) uses pre-paid lodging
  - The lowest percent of travelers (5%) accompanied by business associates and a low percent of business travelers (29%)
  - The highest percent of travelers (98%), travel without children
  - The shortest average stay in a hotel/motel – 3.9 nights – and the second (after Japan) shortest stay in destination (6.9 nights)
  - The highest percent of travelers (48%) to use a taxi/cab/limousine in the U.S. and the second highest percent (after China/Hong Kong) (46%) to fly between cities in the U.S.
  - The highest percent (14%) to use Newark, NJ as a main port of entry
  - Among countries with a high percent of travelers sightseeing in cities (64%), visiting historical places (49%), national parks (44%), touring the countryside (46%) and enjoying water sports/sunbathing (22%)
  - High spending on entertainment in the U.S. (\$254 per visitor/per trip) and low spending on gifts/souvenirs (\$214 per visitor/per trip)
  - The second highest (after France) average annual income - \$109,300

## Countries with small sample sizes

	<b>Hong Kong/China</b>	<b>Germany</b>	<b>France</b>	<b>Benelux</b>
Sample Size*	79	75	27	15
Return Visitors to U.S.	72%	91%	88%	72%
Seattle as a Main Port of Entry	21%	16%	7%	40%
Washington as a Main Destination	73%	50%	44%	72%
Average Number of States Visited	2.2	2.9	2.8	2.3
Purpose of Trip:				
-Leisure/Visit Friends and Relatives	35%	67%	60%	73%
-Business	61%	32%	38%	25%
Type of Accommodation**:				
-Hotel/Motel	64%	47%	70%	75%
-Private Home	37%	50%	36%	38%
Average Length of Stay in the U.S. (nights)	24	20	20	15
Adult Only Travel Parties	96%	94%	99%	98%
Average Party Size	1.4	1.4	1.2	1.6
Average Age:				
-Men	39	46	41	50
-Women	38	37	32	43
Average Expenditures in the U.S.:				
-Per Party per Trip	\$3,623	\$2,415	\$4,166	\$3,136
-Per Visitor per Trip	\$2,579	\$1,761	\$3,609	\$1,954
-Per Visitor per Day	\$107	\$90	\$182	\$131
Average Annual Household Income	\$52,800	\$75,600	\$92,300	\$73,600

\* According to the Office of Travel and Tourism Industries (OTTI), recommended sample size should be 100 (prior to 2006 policy) and 400 (current statistical policy) for visitation estimates for international travel to the United States. Smaller sample sizes produce less reliable estimates.

\*\* Multiple Responses

Note: Percentage estimates in this table represent weighted percentages, and may differ from calculated percentages, which represent the number of actual respondents to a specific question.

## References

- U.S. Department Of Commerce,  
Tourism Industries, ITA: *In-Flight Survey of International Air  
Travelers; Data regarding international travel  
to the U.S. as reported on the ITA website*
  
- CIC Research Inc. *Overseas Travelers to Washington State,  
2004-2006, Custom Report*

## Appendix A

	Code	Airlines
1	EI	AER LINGUS
2	SU	AEROFLOT RUSSIAN AIRLINES
3	CA	AIR CHINA
4	AF	AIR FRANCE
5	AI	AIR INDIA
6	NZ	AIR NEW ZEALAND
7	AZ	ALITALIA
8	AA	AMERICAN AIRLINES
9	NH	ANA
10	OZ	ASIANA AIRLINES
11	OS	AUSTRIAN AIRLINES
12	AV	AVIANCA
13	BA	BRITISH AIRWAYS
14	CI	CHINA AIRLINES
15	MU	CHINA EASTERN
16	CO	CONTINENTAL AIRLINES
17	OK	CZECH AIRLINES
18	DL	DELTA AIRLINES
19	MS	EGYPTAIR
20	LY	EL-AL ISRAEL
21	EK	EMIRATES AIR
22	BR	EVA AIRWAYS
23	AY	FINNAIR
24	IB	IBERIA
25	FI	ICELANDAIR
26	JL	JAPAN AIRLINES
27	KL	KLM
28	LO	LOT POLISH AIRLINES
29	LT	LTU INTERNATIONAL
30	LH	LUFTHANSA
31	MH	MALAYSIAN AIRLINES
32	NA	NORTH AMERICAN AIRLINES
33	QF	QANTAS
34	AT	ROYAL AIR MAROC
35	SK	SAS
36	SQ	SINGAPORE AIRLINES
37	SA	SOUTH AFRICAN AIR
38	LX	SWISS
39	TP	TAP AIR PORTUGAL
40	TK	TURKISH AIRLINES
41	UA	UNITED
42	VS	VIRGIN ATLANTIC