

CHARACTERISTICS OF TRAVELERS FROM SOUTH AMERICA TO CALIFORNIA – 2010

South America was one of California’s large overseas markets with approximately 310,000 visitors to California in 2010. Collectively visitors from South America spent approximately \$462 million in California.

South American visitors to California during 2010 reported spending \$146 per day during an 10.2 night average stay or approximately \$1,489 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

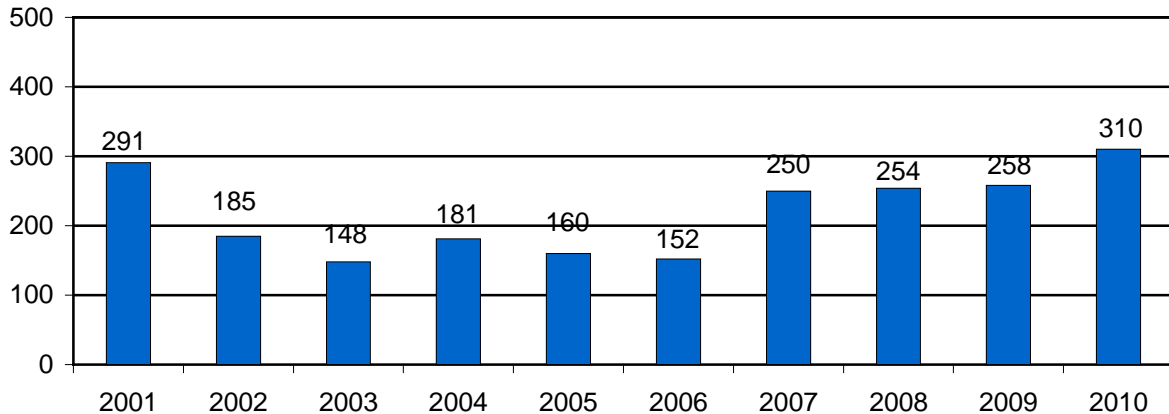
Visitors From South America

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2000	2,941,471	11.6%	341,000
2001	2,531,089	11.5%	291,000
2002	1,815,230	10.2%	185,000
2003	1,522,191	9.7%	148,000
2004	1,645,342	11.0%	181,000
2005	1,820,315	8.8%	160,000
2006	1,927,647	7.9%	152,000
2007	2,273,802	11.0%	250,000
2008	2,555,599	9.9%	254,000
2009	2,741,535	9.4%	258,000
2010	3,250,298	9.5%	310,000

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 South America to CA, 2001-2010 (in 000s)



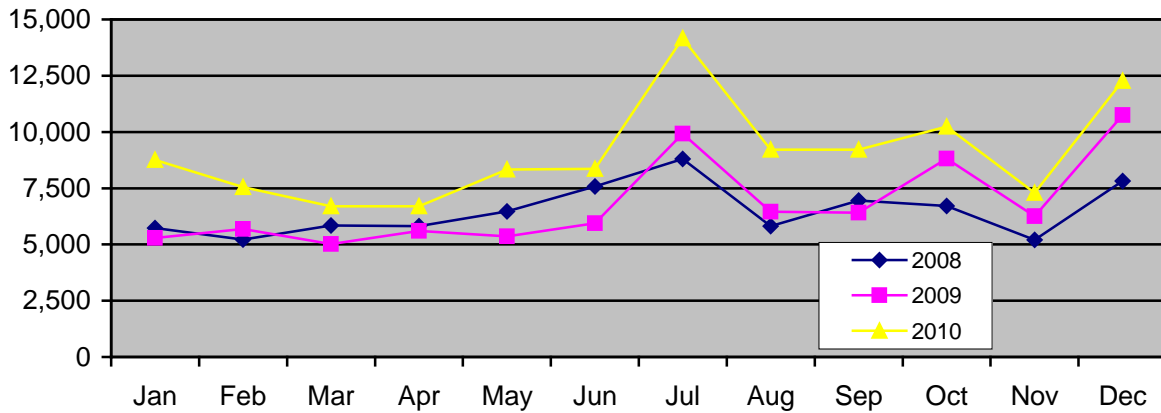
Source: International Trade Administration, Office of Travel and Tourism Industries.

In past years, the volume of visitors to California from South America was at its highest in 1998 at a level of 447,000 visitors. Over the next five years this volume decreased to 148,000 visitors in 2003, and has fluctuated up and down since then. There has been growth in the visitor volume from 152,000 visitors in 2006 to 310,000 visitors in 2010. Nevertheless, the volume of visitors to California from South America still remains significantly below the peak levels experienced in the late 1990's.

South American Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from South America to California were higher in 2010 compared with 2009 and 2008. In 2009, South American resident arrivals at California ports-of-entry peaked in July and December. The lowest volume was recorded in March and April.

**Residents of South America
Monthly Port of Entry Arrivals to CA
2008-2010**



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 America 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 America are more likely to:

- Travel to the U.S. for leisure purposes
- Have shorter trip planning and booking horizons
- Fly in economy/tourist/coach class
- Travel alone
- Visit Miami as part of their trip
- Visit historical places while visiting the U.S.
- Use airlines for transportation while in the U.S.
- Spend a larger proportion of their trip spending on gifts and souvenirs in the U.S.

Conversely, visitors from South America are less likely to:

- Use a personal computer to plan their trip
- Be on their first trip to the U.S.
- Fly in executive/business class
- Visit national parks, tour the countryside, or go on guided tours

Characteristics of Travelers from South America to California – 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from South America (n = 298)	Leisure Visitors from South America (n = 185)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	58%	80%
Visit Friends/Relatives	22%	15%	20%
Business/Professional	21%	15%	-
Convention/Conference	5%	8%	-
Other Purpose	5%	4%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	77%	88%
Visit Friends/Relatives	39%	45%	41%
Business/Professional	24%	17%	4%
Convention/Conference	9%	14%	-
Sources Used to Plan Trip**			
Personal Computer	44%	33%	30%
Travel Agency	40%	37%	40%
Airlines Directly	23%	28%	31%
Friends/Relatives	17%	24%	21%
Travel Guides	10%	7%	10%
Corporate Travel Department	8%	7%	-
Tour Company	5%	5%	5%
State/City Travel Office	4%	2%	1%
Newspapers/Magazines	3%	5%	9%
Advance Planning for Trip			
7 days or less	6%	6%	5%
8 - 30 days	28%	26%	25%
31 - 60 days	20%	23%	22%
61 - 90 days	12%	24%	25%
More than 3 Months	34%	21%	23%
Total	100%	100%	100%
Average Planning Time in Days	98 days	81 days	86 days
Advance Airline Reservations			
7 days or less	12%	8%	7%
8 - 30 days	38%	44%	38%
31 - 60 days	17%	24%	27%
61 - 90 days	10%	15%	20%
91 - 120 days	7%	2%	3%
121 - 180 days	10%	6%	5%
6 Months or More	7%	1%	1%
Total	100%	100%	100%
Average Booking in Days	68 days	51 days	56 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%.

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

**Characteristics of Travelers from South America to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from South America (n = 298)	Leisure Visitors from South America (n = 185)
Means of Booking Air Trip			
Travel Agent	46%	52%	53%
Personal Computer	25%	21%	16%
Airlines Directly	13%	19%	21%
Corporate Travel Department	9%	1%	1%
Tour Operator	5%	5%	5%
Travel Club	1%	1%	2%
Other/Don't Know	2%	1%	1%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	31%	37%
Schedule	13%	12%	9%
Non-Stop Flight	12%	15%	23%
Mileage Bonus/Frequent Flyer Program	10%	13%	8%
Previous Good Experience	9%	8%	11%
Safety Reputation	6%	3%	5%
Airline Loyalty	4%	4%	6%
In-flight Service	5%	-	-
Employer policy	3%	1%	-
Other	6%	12%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	92%	88%
Executive/Business	17%	6%	9%
First Class	2%	2%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	10%	14%
No	86%	90%	86%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	24%	29%	14%
31 - 60 days	13%	21%	30%
61 - 90 days	13%	33%	38%
91 - 120 days	8%	2%	-
121 - 180 days	18%	13%	18%
6 Months or More	20%	2%	-
Total	100%	100%	100%

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**Characteristics of Travelers from South America to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from South America (n = 298)	Leisure Visitors from South America (n = 185)
Travel Companions**			
Traveling Alone	39%	52%	39%
Spouse	27%	25%	37%
Family/Relatives	25%	28%	36%
Friends	11%	6%	6%
Business Associates	8%	2%	-
Tour Group	2%	2%	1%
Average Travel Party Size	1.6	1.4	1.5
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	73%	76%
Private Home	29%	33%	29%
Other	4%	4%	5%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	19.3 nights	16.4 nights
Mean Nights in California	11.3 nights	10.2 nights	8.1 nights
% of California Nights	50%	53%	49%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	14%	19%
Average Trips to the U.S. in Past Year	1.8 trips	1.8 trips	1.8 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.5 trips	5.2 trips
Average Number of States Visited	2.1 states	2.0 states	2.0 states
Average Number of Destinations Visited	3.0 dest.	2.8 dest.	2.8 dest.
Places Visited in the U.S.**			
Los Angeles	60%	66%	71%
San Francisco	47%	41%	41%
Las Vegas	29%	25%	34%
New York City	16%	16%	20%
San Diego	14%	15%	15%
Flagstaff	8%	1%	2%
Anaheim-Santa Ana	7%	4%	2%
Grand Canyon	5%	1%	2%
San Jose	5%	3%	2%
DC Metro Area	5%	3%	1%
Yosemite	4%	1%	-
Chicago	4%	5%	4%
Monterey-Salinas	4%	2%	3%
Miami	4%	16%	14%
Riverside/San Bernardino	4%	7%	2%
Seattle	3%	-	-
Sacramento	3%	7%	1%

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Activities Experienced While in the U.S.**			
Shopping	88%	87%	91%
Dining Out	85%	84%	84%
Sightseeing in Cities	57%	60%	58%
Historical Places	47%	61%	55%
Amusement/Theme Parks	40%	45%	46%
National Parks	38%	25%	31%
Visiting Small Towns	38%	40%	41%
Cultural Heritage Sites	31%	26%	22%
Touring Countryside	31%	21%	13%
Art Gallery/Museum	26%	32%	28%
Casinos/Gambling	25%	30%	19%
Guided Tours	23%	13%	19%
Transportation While in the U.S.**			
Rented Auto	41%	47%	57%
Taxi/Limousine	39%	37%	36%
Airlines in U.S.	37%	51%	54%
Company or Private Auto	28%	27%	19%
City Subway/Tram/Bus	25%	29%	28%
Railroad between Cities	12%	10%	12%
Bus between Cities	10%	15%	8%
Motor Home/Camper	2%	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$3,964	\$5,294
Per Visitor/Trip (U.S.)	\$2,435	\$2,826	\$3,441
Per Visitor Per Day	\$107	\$146	\$210
Per Visitor/Trip (California)	\$1,209	\$1,489	\$1,701
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$699	\$852
Food/Beverages	\$514	\$432	\$494
Gifts/Souvenirs	\$421	\$863	\$1,182
Transportation in the U.S.	\$384	\$342	\$399
Entertainment	\$243	\$287	\$364
Expenses at the Airport	\$34	\$53	\$31
Other	\$179	\$149	\$119
Total Spending Per Visitor/Trip	\$2,435	\$2,826	\$3,441

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**Characteristics of Travelers from South America to California
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Payment Method for Trip Expenses			
Credit Cards	52%	52%	52%
Cash	39%	44%	44%
Debit Cards	7%	4%	4%
Travelers Checks	1%	1%	1%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	41 years	45 years
Average Age - Females	40 years	42 years	39 years
Occupation			
Professional/Technical	33%	35%	37%
Manager/Executive	29%	32%	36%
Student	10%	13%	7%
Retired	9%	10%	5%
Clerical/Sales	8%	2%	3%
Other	12%	9%	14%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	12%	12%
\$20,000 - \$39,999	13%	18%	18%
\$40,000 - \$59,999	14%	9%	6%
\$60,000 - \$79,999	13%	10%	15%
\$80,000 - \$99,999	11%	10%	11%
\$100,000 - \$119,999	11%	8%	7%
\$120,000 - \$139,999	7%	10%	5%
\$140,000 - \$159,999	6%	6%	4%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	3%	2%	3%
\$200,000 and over	13%	14%	20%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$92,400	\$96,900

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