

CHARACTERISTICS OF TRAVELERS FROM BRAZIL TO CALIFORNIA - 2008

Brazil was one of California's smaller overseas markets with approximately 67,000 visitors to California in 2007. Collectively visitors from Brazil spent approximately \$88 million in California.

Brazilian visitors to California during 2008 reported spending \$76 per day during a 17.3 night average stay or approximately \$1,315 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

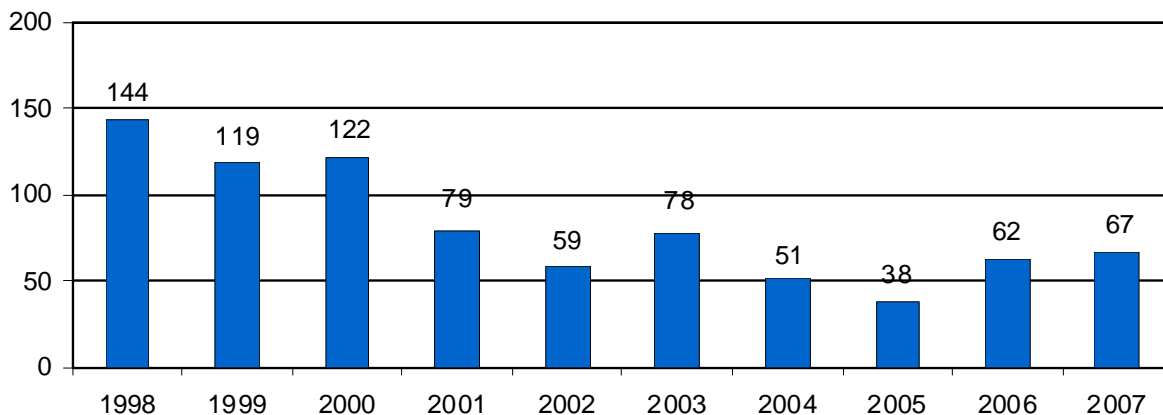
Visitors From Brazil

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	909,477	15.8%	144,000
1999	665,013	21.7%	144,000
2000	737,245	16.1%	119,000
2001	551,406	22.1%	122,000
2002	405,094	19.4%	79,000
2003	348,945	17.0%	59,000
2004	384,734	20.2%	78,000
2005	485,373	10.5%	51,000
2006	525,271	7.3%	38,000
2007	636,431	9.7%	62,000
2008	769,232	8.7%	67,000

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 Brazil to CA, 1999-2008 (in 000s)



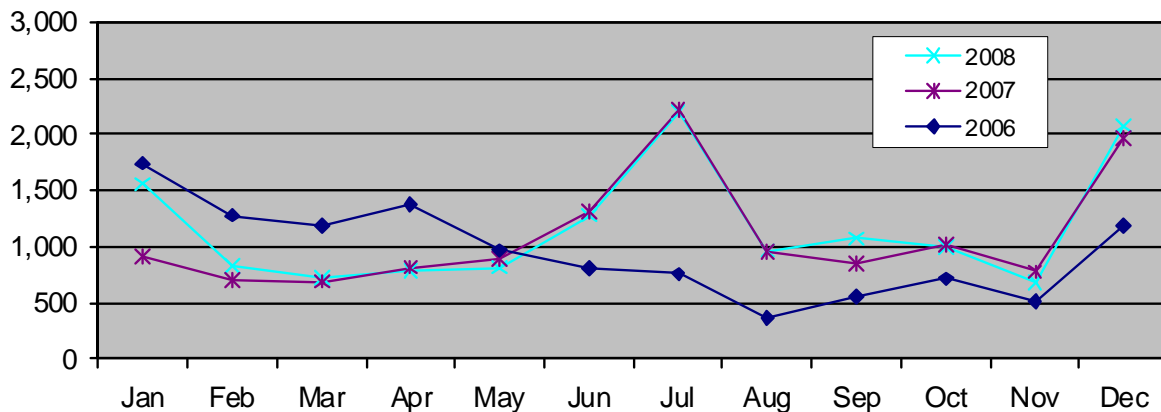
Source: International Trade Administration, Office of Travel and Tourism Industries.

Since 1997 visitor volume to California from Brazil has dropped from 178,000 to a low of just 38,000 in 2006. By 2008 the number of visitors to California from Brazil had risen to 67,000. Brazil is a large market, but it is subject to big swings in its economy and the total volume of Brazilians visiting the U.S. Almost one million residents of Brazil visited the U.S. in 1997, but by 2003 total U.S. arrivals had dropped 63% to about 350,000.

Brazilian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Brazil to California varied during the years of 2006 to 2008. In 2008, Brazilian resident arrivals were very similar to those in 2007 except for the month of January where they were higher. In general, Brazilian resident arrivals at California ports-of-entry tended to peak in July and December. For 2008, the lowest volumes were recorded in February, March, and November.

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



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Brazil 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 Brazil are more likely to:

- Make use of travel agents when planning as well as booking their trip
- Select an airline due to the Mileage Bonus/Frequent Flyer Program
- Fly in economy/tourist/coach class
- Travel alone
- Spend a longer amount of time in the U.S. and California
- Visit San Diego
- Experience activities that are more leisure-oriented, such as visiting historical places, amusement/theme parks, casinos, and art galleries and museums
- Use airlines for transportation while in the U.S.
- Spend a higher percentage of their travel dollar on gifts/souvenirs
- Work in a professional/technical occupation
- Have a lower average household income

Conversely, visitors from Brazil are less likely to:

- Travel to California to visit friends or relatives
- Use a personal computer to get trip planning information
- Make advance airline reservations
- Fly in executive/business class
- Travel with business associates
- Stay in a hotel or other paid lodging
- Go on guided tours or tour the countryside

**Characteristics of Travelers from
Brazil to California – 2008**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Brazil (n = 158)	Leisure Visitors from Brazil (n = 86)*
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	44%	71%
Visit Friends/Relatives	19	18	29
Business/Professional	27	26	-
Convention/Conference	7	7	-
Other Purpose	5	5	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	66%	80%
Visit Friends/Relatives	37	27	38
Business/Professional	31	36	8
Convention/Conference	11	13	3
Sources Used to Plan Trip**			
Airlines Directly	21%	26%	26%
Corporate Travel Department	11	6	3
Personal Computer	42	33	43
Friends/Relatives	16	17	25
Newspapers/Magazines	3	2	3
State/City Travel Office	4	1	0
Tour Company	6	4	6
Travel Agency	43	57	54
Travel Guides	10	9	14
Advance Planning for Trip			
7 days or less	9%	4%	2%
8 - 30 days	30	26	17
31 - 60 days	19	25	31
61 - 90 days	13	18	17
More than 3 Months	30	28	33
Total	100%	100%	100%
Average Planning Time in Days	92	90	101
Advance Airline Reservations			
7 days or less	16%	10%	6%
8 - 30 days	38	48	43
31 - 60 days	17	23	28
61 - 90 days	10	8	11
91 - 120 days	5	5	6
121 - 180 days	8	5	5
6 Months or More	6	1	2
Total	100%	100%	100%
Average Booking in Days	60	48	54

* 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 Brazil to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Brazil (n = 158)	Leisure Visitors from Brazil (n = 86)*
Means of Booking Air Trip			
Airlines Directly	12%	11%	13%
Corporate Travel Department	11	3	3
Personal Computer	22	16	23
Travel Agent	48	60	49
Travel Club	1	-	-
Tour Operator	4	7	8
Other/Don't Know	3	3	5
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	27%	22%
Schedule	15	15	19
Non-Stop Flight	13	8	0
Mileage Bonus/Frequent Flyer Program	12	31	38
Previous Good Experience	10	5	5
Safety Reputation	7	4	8
Airline Loyalty	4	0	0
In-flight Service	5	-	-
Employer policy	4	3	-
Other	6	6	7
Airline Seating Area			
Economy/Tourist/Coach	77%	92%	91%
Executive/Business	20	7	10
First Class	3	1	-
Total	100%	100%	100%
Use of Package			
Yes	11%	8%	10%
No	89	92	90
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	4%	6%
8 - 30 days	26	35	14
31 - 60 days	23	34	48
61 - 90 days	12	27	32
91 - 120 days	5	-	-
121 - 180 days	17	-	-
6 Months or More	14	-	-
Total	100%	100%	100%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Brazil (n = 158)	Leisure Visitors from Brazil (n = 86)*
Travel Companions**			
Business Associates	10%	1%	-
Family/Relatives	23	25	25%
Friends	12	5	7
Spouse	27	26	32
Tour Group	2	2	-
Traveling Alone	39	53	49
Average Travel Party Size	1.5	1.4	1.4
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	67%	62%
Private Home	28	33	38
Other	4	4	5
Length of Stay			
Mean Nights in the U.S.	21.2	33.4	27.4
Mean Nights in California	11.0	17.3	17.2
% of California Nights	52%	52%	63%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	16%	20%
Average Trips to the U.S. in Past Year	2.0	1.7	1.7
Average Trips to the U.S. in Past 5 Years	6.3	4.9	4.9
Average Number of States Visited	2.0	2.1	2.1
Average Number of Destinations Visited	2.9	2.8	3.1
Places Visited in the U.S.**			
Los Angeles	53%	45%	49%
San Francisco	49	44	59
Las Vegas	28	29	32
New York City	17	25	20
San Diego	13	22	22
San Jose	7	5	6
Anaheim-Santa Ana	7	8	6
Yosemite	5	1	3
Grand Canyon	4	-	-
Chicago	4	4	3
DC Metro Area	4	3	4
Monterey-Salinas	4	4	7
Seattle	3	3	4
Sacramento	3	7	9
Riverside/San Bernardino	3	2	-
Santa Barbara	3	4	6

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(2008 - cont.)**

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Activities Experienced While in the U.S.**			
Dining Out	87%	89%	87%
Shopping	85	93	90
Sightseeing in Cities	53	51	54
Historical Places	44	54	66
Visiting Small Towns	36	37	50
National Parks	35	31	44
Amusement/Theme Parks	34	50	55
Touring Countryside	30	15	20
Cultural Heritage Sites	28	23	28
Casinos/Gambling	24	35	32
Art Gallery/Museum	23	32	30
Guided Tours	22	9	9
Transportation While in the U.S.**			
Taxi/Limousine	42%	35%	30%
Airlines in U.S.	40	58	54
Rented Auto	36	41	39
Company or Private Auto	28	24	21
City Subway/Tram/Bus	26	24	25
Railroad between Cities	11	11	10
Bus between Cities	9	9	10
Motor Home/Camper	2	1	1
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,470	\$3,973
Per Visitor/Trip (U.S.)	2,607	2,550	2,826
Per Visitor Per Day	123	76	103
Per Visitor/Trip (California)	\$1,353	\$1,315	\$1,772
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$631	\$485
Food/Beverages	526	441	471
Gifts/Souvenirs	450	763	1,037
Transportation in the U.S.	425	334	381
Entertainment	234	274	363
Expenses at the Airport	37	26	22
Other	135	81	67
Total Spending Per Visitor/Trip	\$2,607	\$2,550	\$2,826

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(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Brazil (n = 158)	Leisure Visitors from Brazil (n = 86)*
Payment Method for Trip Expenses			
Credit Cards	53%	52%	47%
Cash	37	35	39
Debit Cards	6	6	6
Travelers Checks	3	7	8
Total	100%	100%	100%
Age			
Average Age - Males	41	42	44
Average Age - Females	38	39	42
Occupation			
Manager/Executive	34%	31%	25%
Professional/Technical	32	45	47
Student	8	9	6
Clerical/Sales	7	2	3
Retired	6	4	5
Other	13	9	14
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	12%	9%
\$20,000 - \$39,999	10	12	12
\$40,000 - \$59,999	13	17	21
\$60,000 - \$79,999	11	10	8
\$80,000 - \$99,999	11	10	14
\$100,000 - \$119,999	11	12	14
\$120,000 - \$139,999	7	5	6
\$140,000 - \$159,999	6	6	4
\$160,000 - \$179,999	4	6	3
\$180,000 - \$199,999	3	-	0
\$200,000 and over	18	10	9
Total	100%	100%	100%
Average Annual Income	\$107,200	\$88,900	\$87,300

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