

CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2009

Air travelers from Mexico represent one of the largest international markets for California with approximately 343,000 visitors to the state in 2009. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$187 million in California.

Visitors from Mexico to California in 2009, who arrived in the U.S. by air, reported spending \$85 per day during a 6.4 night average stay in California or approximately \$544 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

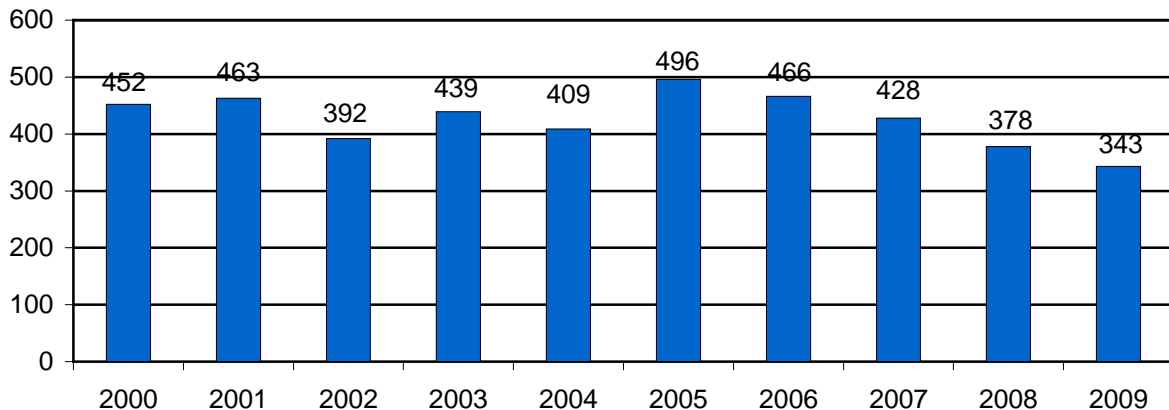
Visitors From Mexico (Air)

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	1,420,832	26.8%	381,000
1999	1,489,170	22.0%	328,000
2000	1,736,609	26.0%	452,000
2001	1,512,980	30.6%	463,000
2002	1,436,727	27.3%	392,000
2003	1,359,418	32.3%	439,000
2004	1,493,971	27.4%	409,000
2005	1,668,432	29.7%	496,000
2006	1,713,158	27.2%	466,000
2007	1,878,399	22.8%	428,000
2008	1,708,320	22.1%	378,000
2009	1,511,110	22.7%	343,000

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 Mexico (Air) to CA, 2000-2009 (in 000s)



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

Over the last 10 years Mexican air travelers who visited California have recorded substantial shifts in market share. The highest annual volume of visitors was in 2005 with 496,000 visitors to California from Mexico by air. Since then the visitor volume has decreased each year to a low of 343,000 visitors in 2009.

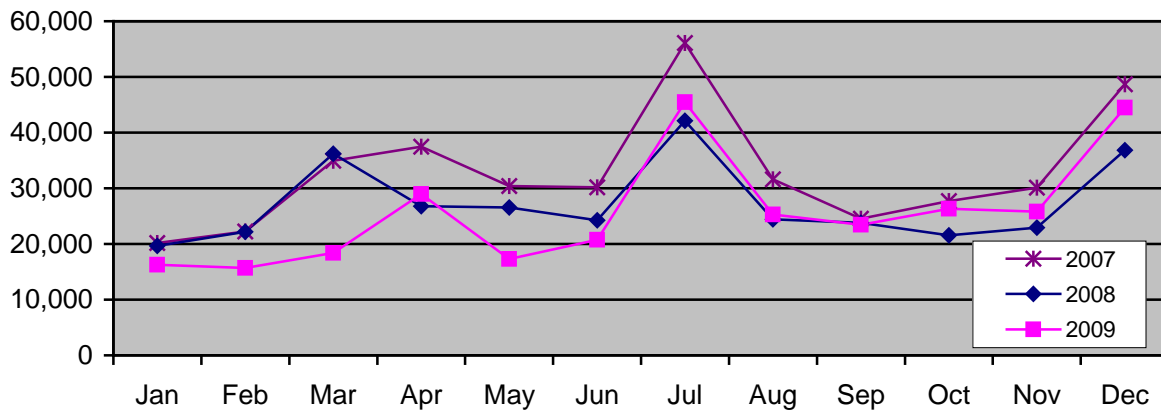
Mexican Visitors to California Arriving by Land and Air (Estimated)

Mexican visitors to California who arrive in the U.S. by land are not included in the “Survey of International Air Travelers.” The volume of visitors to California from Mexico arriving in the U.S. by land was estimated at 5.91 million visitors for 2009 (6.37 million in 2008). Total Mexican visitors (air and land) to the state in 2009 was estimated at 6.25 million visitors (6.74 million in 2008). The volume of Mexican visitors to the state has declined 27.2% from a peak of almost 8.6 million in 2005.¹

Mexican Arrivals at California Airports

Monthly volumes of port-of-entry air passenger arrivals from Mexico to California were lower in the early months of 2009 compared with 2007 and 2008. In general, Mexican resident air arrivals at California ports-of-entry peaked in July and December. The lowest volumes were recorded in January and February.

**Residents of Mexico
Monthly Port of Entry Arrivals to CA (Air)
2007-2009**



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

¹ Source: Continuous ongoing monthly intercept survey of visitors and monthly telephone survey of households for overnight in-home guests, CIC Research, Inc., August 2009. (Please note that residents of Mexico that cross the border on a daily basis for work are not defined as a visitor and are not included in the visitor volume estimates.)

Comparison of Overseas Visitors to California with Visitors from Mexico

Detailed trip and traveler characteristics of visitors from Mexico by air 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 Mexico by air are more likely to:

- Have decidedly lower trip planning and advance airline booking horizons
- Book their air travel with a personal computer
- Select an airline due to a non-stop flight
- Have a shorter length of stay in the U.S. and in California
- Have a higher average number of trips to the U.S. in the previous 5 years
- Visit Los Angeles as part of their trip
- Spend less per visitor per trip in the U.S.
- Work in a managerial/executive position
- Have a lower average household income

Conversely, visitors from Mexico by air are less likely to:

- Travel to California for leisure/recreation/holidays
- Use information from friends or relatives to plan their trip
- Use a travel agent to book their air trip
- Be on their first trip to the U.S.
- Travel to destinations further from Mexico such as San Francisco, New York City and Las Vegas
- Experience many activities including: shopping, sightseeing in cities, visiting national parks, cultural heritage sites, casinos, and going on guided tours
- Use airlines, taxis/limousines, or public transportation while in the U.S.

**Characteristics of Visitors to California from Overseas Countries and Mexico
Who Arrived in the U.S. by Air (2009)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors to CA from Mexico (Air) (n = 228)	Leisure Visitors to CA from Mexico (Air) (n = 149)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	34%	58%
Business/Professional	22%	26%	-
Visit Friends/Relatives	21%	25%	42%
Convention/Conference	6%	3%	-
Other Purpose	5%	12%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	51%	70%
Visit Friends/Relatives	37%	36%	51%
Business/Professional	26%	28%	2%
Convention/Conference	8%	9%	-
Sources Used to Plan Trip**			
Airlines Directly	23%	32%	38%
Corporate Travel Department	8%	7%	-
Personal Computer	43%	37%	45%
Friends/Relatives	18%	5%	4%
Newspapers/Magazines	3%	-	1%
State/City Travel Office	4%	4%	5%
Tour Company	7%	3%	4%
Travel Agency	40%	34%	20%
Travel Guides	10%	5%	8%
Advance Planning for Trip			
7 days or less	7%	15%	6%
8 - 30 days	28%	48%	40%
31 - 60 days	19%	8%	6%
61 - 90 days	12%	7%	10%
More than 3 Months	34%	22%	39%
Total	100%	100%	100%
Average Planning Time in Days	100 days	59 days	91 days
Advance Airline Reservations			
7 days or less	13%	28%	12%
8 - 30 days	38%	49%	51%
31 - 60 days	16%	20%	30%
61 - 90 days	10%	2%	3%
91 - 120 days	6%	1%	2%
121 - 180 days	10%	-	1%
6 Months or More	7%	1%	1%
Total	100%	100%	100%
Average Booking in Days	67 days	25 days	36 days

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

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

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

**Characteristics of Visitors to California from Overseas Countries and Mexico
Who Arrived in the U.S. by Air (2009 – cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors to CA from Mexico (Air) (n = 228)	Leisure Visitors to CA from Mexico (Air) (n = 149)
Means of Booking Air Trip			
Airlines Directly	13%	15%	11%
Corporate Travel Department	9%	12%	-
Personal Computer	25%	36%	47%
Travel Agent	46%	36%	40%
Travel Club	1%	-	-
Tour Operator	5%	1%	1%
Other/Don't Know	2%	-	-
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	37%	37%
Schedule	13%	20%	4%
Non-Stop Flight	12%	27%	38%
Mileage Bonus/Frequent Flyer Program	10%	5%	9%
Previous Good Experience	9%	3%	5%
Safety Reputation	6%	1%	1%
Airline Loyalty	4%	-	-
In-flight Service	5%	1%	2%
Employer policy	3%	1%	-
Other	6%	5%	3%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	86%	87%
Executive/Business	17%	14%	12%
First Class	2%	1%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	14%	12%
No	86%	86%	88%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	24%	94%	80%
31 - 60 days	13%	1%	4%
61 - 90 days	13%	-	-
91 - 120 days	8%	-	-
121 - 180 days	18%	5%	16%
6 Months or More	20%	-	-
Total	100%	100%	100%

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"Survey of International Air Travelers."

**Characteristics of Visitors to California from Overseas Countries and Mexico
Who Arrived in the U.S. by Air (2009 – cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Mexico (Air) (n = 228)	Leisure Visitors to CA from Mexico (Air) (n = 149)
Travel Companions**			
Business Associates	8%	4%	1%
Family/Relatives	25%	24%	42%
Friends	11%	6%	7%
Spouse	28%	35%	45%
Tour Group	2%	-	-
Traveling Alone	38%	47%	33%
Average Travel Party Size	1.6	1.5	1.8
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	76%	59%
Private Home	30%	27%	44%
Other	4%	1%	2%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	9.9 nights	11.5 nights
Mean Nights in California	11.7 nights	6.4 nights	8.6 nights
% of California Nights	52%	65%	75%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	13%	24%
Average Trips to the U.S. in Past Year	1.7 trips	2.9 trips	2.3 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	11.8 trips	8.1 trips
Average Number of States Visited	2.1 states	1.5 states	1.6 states
Average Number of Destinations Visited	3.0 dest.	1.8 dest.	2.0 dest.
Places Visited in the U.S.**			
Los Angeles	55%	65%	65%
San Francisco	48%	18%	26%
Las Vegas	30%	12%	18%
New York City	18%	6%	7%
San Diego	13%	15%	5%
Anaheim-Santa Ana	7%	9%	14%
Grand Canyon	7%	-	-
San Jose	6%	2%	3%
Yosemite	4%	-	-
Chicago	4%	4%	7%
DC Metro Area	4%	4%	-
Monterey-Salinas	4%	4%	1%
Riverside/San Bernardino	4%	4%	4%
Seattle	3%	3%	-
Sacramento	3%	3%	2%
Santa Barbara	3%	3%	-

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**Characteristics of Visitors to California from Overseas Countries and Mexico
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors to CA from Mexico (Air) (n = 228)	Leisure Visitors from Mexico (Air) (n = 149)
Activities Experienced While in the U.S.**			
Shopping	87%	77%	82%
Dining Out	86%	83%	75%
Sightseeing in Cities	56%	36%	49%
Historical Places	45%	50%	63%
National Parks	39%	22%	30%
Amusement/Theme Parks	39%	43%	62%
Visiting Small Towns	38%	33%	41%
Cultural Heritage Sites	32%	21%	34%
Touring Countryside	31%	22%	34%
Casinos/Gambling	27%	6%	8%
Art Gallery/Museum	26%	31%	41%
Guided Tours	24%	12%	18%
Transportation While in the U.S.**			
Airlines in U.S.	39%	28%	34%
Taxi/Limousine	39%	24%	12%
Rented Auto	38%	47%	43%
Company or Private Auto	29%	22%	27%
City Subway/Tram/Bus	26%	16%	21%
Railroad between Cities	11%	13%	11%
Bus between Cities	10%	16%	13%
Motor Home/Camper	2%	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$1,271	\$1,819
Per Visitor/Trip (U.S.)	\$2,308	\$847	\$1,027
Per Visitor Per Day	\$103	\$85	\$90
Per Visitor/Trip (California)	\$1,205	\$544	\$774
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$211	\$235
Food/Beverages	\$463	\$178	\$211
Gifts/Souvenirs	\$395	\$231	\$261
Transportation in the U.S.	\$348	\$114	\$147
Entertainment	\$234	\$87	\$152
Expenses at the Airport	\$34	\$20	\$17
Other	\$174	\$6	\$3
Total Spending Per Visitor/Trip	\$2,308	\$847	\$1,027

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**Characteristics of Visitors to California from Overseas Countries and Mexico
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Payment Method for Trip Expenses			
Credit Cards	50%	47%	43%
Cash	41%	46%	55%
Debit Cards	7%	7%	2%
Travelers Checks	2%	1%	1%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	44 years	43 years
Average Age - Females	39 years	40 years	42 years
Occupation			
Professional/Technical	35%	34%	39%
Manager/Executive	28%	42%	32%
Student	10%	10%	9%
Retired	8%	4%	4%
Clerical/Sales	7%	1%	2%
Other	13%	10%	15%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	17%	30%
\$20,000 - \$39,999	14%	15%	13%
\$40,000 - \$59,999	14%	10%	8%
\$60,000 - \$79,999	13%	11%	8%
\$80,000 - \$99,999	11%	19%	10%
\$100,000 - \$119,999	9%	11%	19%
\$120,000 - \$139,999	6%	4%	2%
\$140,000 - \$159,999	5%	5%	4%
\$160,000 - \$179,999	3%	1%	2%
\$180,000 - \$199,999	3%	4%	3%
\$200,000 and over	12%	4%	4%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$77,200	\$69,800

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