

CHARACTERISTICS OF TRAVELERS FROM SOUTH AMERICA TO CALIFORNIA – 2008

South America was one of California’s large overseas markets with approximately 254,000 visitors to California in 2008. Collectively visitors from South America spent approximately \$539 million in California.

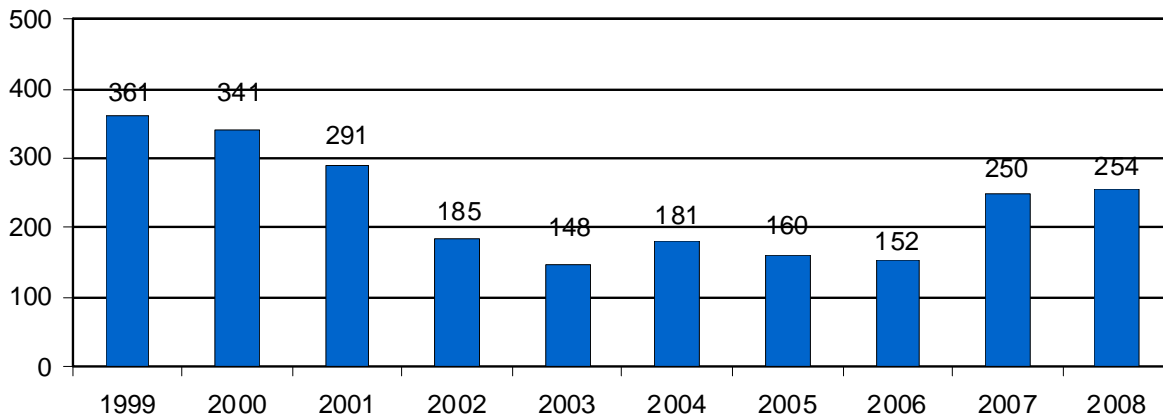
South American visitors to California during 2008 reported spending \$191 per day during an 11.1 night average stay or approximately \$2,120 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

Visitors From South America

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	2,957,318	15.1%	447,000
1999	2,733,227	13.2%	361,000
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

- 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, 1999-2008 (in 000s)



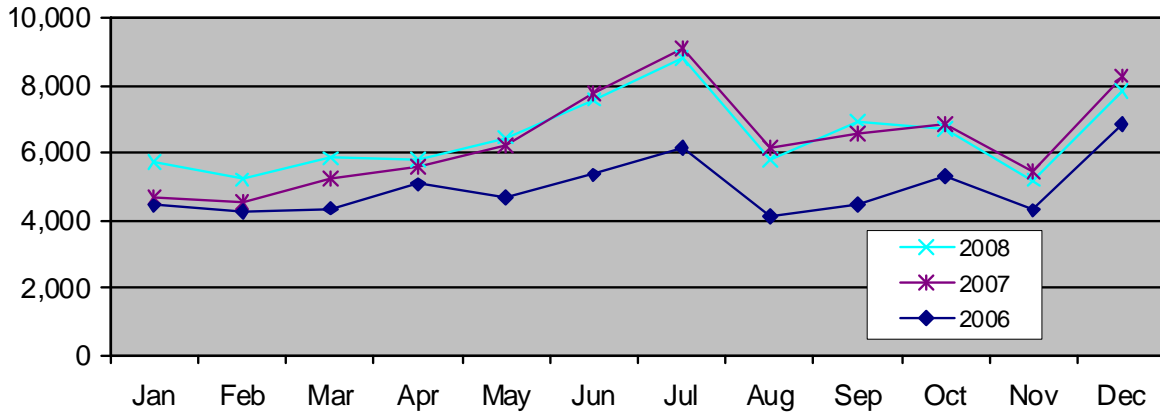
Source: International Trade Administration, Office of Travel and Tourism Industries.

In the past 10 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 was a large spike in the volume from 152,000 visitors in 2006 to 250,000 visitors in 2007 and then to 254,000 visitors in 2008. Nevertheless, the volume of visitors to California from South America 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 consistent in 2008 compared with 2007 and increased from 2006. In general, South American resident arrivals at California ports-of-entry peaked in July. The lowest volumes were recorded in February and November.

**Residents of South America
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 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:

- Get information for planning their trip from travel agents or directly from the airlines
- Have decidedly lower trip planning and advance airline booking horizons
- Use a travel agent to book their trip
- Fly in economy/tourist/coach class
- Have made a prior trip to the U.S.
- Go shopping and visit historical places while visiting the U.S.
- Spend a larger proportion of their trip spending on food, beverages, gifts, and souvenirs, transportation in the U.S., and a smaller proportion on lodging
- Be in a managerial or executive position

Conversely, visitors from South America are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Use a personal computer for trip planning information or to book their air trip
- Consider airfare as the main factor in selecting an airline
- Fly in executive/business class
- Travel with business associates
- Stay in a hotel or other paid lodging
- Be on their first trip to the U.S.
- Visit San Francisco or Las Vegas as part of their trip
- Experience activities such as visiting national parks, touring the countryside, and cultural heritage sites
- Use rented autos for transportation while in the U.S.

**Characteristics of Travelers from
South America to California – 2008**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South America (n = 259)	Leisure Visitors from South America (n = 128)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	30%	53%
Visit Friends/Relatives	19	27	47
Business/Professional	27	25	-
Convention/Conference	7	11	-
Other Purpose	5	7	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	59%	63%
Visit Friends/Relatives	37	34	55
Business/Professional	31	38	5
Convention/Conference	11	22	3
Sources Used to Plan Trip**			
Airlines Directly	21%	30%	28%
Corporate Travel Department	11	4	0
Personal Computer	42	28	30
Friends/Relatives	16	12	16
Newspapers/Magazines	3	1	3
State/City Travel Office	4	3	5
Tour Company	6	3	7
Travel Agency	43	60	55
Travel Guides	10	4	8
Advance Planning for Trip			
7 days or less	9%	21%	5%
8 - 30 days	30	21	36
31 - 60 days	19	15	15
61 - 90 days	13	23	21
More than 3 Months	30	21	23
Total	100%	100%	100%
Average Planning Time in Days	92	70	87
Advance Airline Reservations			
7 days or less	16%	23%	11%
8 - 30 days	38	37	47
31 - 60 days	17	21	16
61 - 90 days	10	9	14
91 - 120 days	5	6	3
121 - 180 days	8	4	9
6 Months or More	6	1	1
Total	100%	100%	100%
Average Booking in Days	60	43	52

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South America (n = 259)	Leisure Visitors from South America (n = 128)
Means of Booking Air Trip			
Airlines Directly	12%	18%	23%
Corporate Travel Department	11	3	-
Personal Computer	22	9	13
Travel Agent	48	63	57
Travel Club	1	0	1
Tour Operator	4	3	3
Other/Don't Know	3	4	3
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	16%	14%
Schedule	15	15	10
Non-Stop Flight	13	19	33
Mileage Bonus/Frequent Flyer Program	12	17	22
Previous Good Experience	10	10	11
Safety Reputation	7	2	3
Airline Loyalty	4	3	1
In-flight Service	5	3	1
Employer policy	4	2	-
Other	6	15	4
Airline Seating Area			
Economy/Tourist/Coach	77%	93%	93%
Executive/Business	20	6	7
First Class	3	1	-
Total	100%	100%	100%
Use of Package			
Yes	11%	4%	5%
No	89	96	95
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	3%	5%
8 - 30 days	26	40	12
31 - 60 days	23	27	42
61 - 90 days	12	30	40
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 South America to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from South America (n = 259)	Leisure Visitors from South America (n = 128)
Travel Companions**			
Business Associates	10%	2%	-
Family/Relatives	23	25	23%
Friends	12	5	7
Spouse	27	32	48
Tour Group	2	1	-
Traveling Alone	39	42	31
Average Travel Party Size	1.5	1.4	1.6
Median Travel party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	61%	51%
Private Home	28	34	55
Other	4	11	2
Length of Stay			
Mean Nights in the U.S.	21.2	19.9	16.5
Mean Nights in California	11.0	11.1	10.7
% of California Nights	52%	56%	65%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	13%	10%
Average Trips to the U.S. in Past Year	2.0	1.8	1.6
Average Trips to the U.S. in Past 5 Years	6.3	6.0	4.0
Average Number of States Visited	2.0	1.8	1.8
Average Number of Destinations Visited	2.9	2.1	2.4
Places Visited in the U.S.**			
Los Angeles	53%	60%	55%
San Francisco	49	33	39
Las Vegas	28	18	22
New York City	17	16	18
San Diego	13	12	18
San Jose	7	4	3
Anaheim-Santa Ana	7	2	2
Yosemite	5	2	4
Grand Canyon	4	2	5
Chicago	4	3	5
DC Metro Area	4	2	3
Monterey-Salinas	4	3	4
Seattle	3	1	2
Sacramento	3	4	5
Riverside/San Bernardino	3	2	2
Santa Barbara	3	1	1

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Activities Experienced While in the U.S.**			
Dining Out	87%	81%	91%
Shopping	85	94	95
Sightseeing in Cities	53	46	39
Historical Places	44	55	55
Visiting Small Towns	36	37	37
National Parks	35	25	28
Amusement/Theme Parks	34	40	37
Touring Countryside	30	14	16
Cultural Heritage Sites	28	18	22
Casinos/Gambling	24	22	25
Art Gallery/Museum	23	24	33
Guided Tours	22	17	7
Transportation While in the U.S.**			
Taxi/Limousine	42%	36%	19%
Airlines in U.S.	40	46	40
Rented Auto	36	24	31
Company or Private Auto	28	34	44
City Subway/Tram/Bus	26	25	24
Railroad between Cities	11	10	6
Bus between Cities	9	6	8
Motor Home/Camper	2	0	1
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$5,240	\$4,016
Per Visitor/Trip (U.S.)	2,607	3,791	2,489
Per Visitor Per Day	123	191	151
Per Visitor/Trip (California)	\$1,353	\$2,120	\$1,616
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$470	\$450
Food/Beverages	526	1,020	429
Gifts/Souvenirs	450	1,123	746
Transportation in the U.S.	425	718	419
Entertainment	234	313	340
Expenses at the Airport	37	91	27
Other	135	56	78
Total Spending Per Visitor/Trip	\$2,607	\$3,791	\$2,489

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Payment Method for Trip Expenses			
Credit Cards	53%	57%	60%
Cash	37	37	34
Debit Cards	6	4	5
Travelers Checks	3	1	1
Total	100%	100%	100%
Age			
Average Age - Males	41	42	47
Average Age - Females	38	38	41
Occupation			
Manager/Executive	34%	51%	48%
Professional/Technical	32	33	37
Student	8	4	3
Clerical/Sales	7	3	3
Retired	6	2	3
Other	13	10	7
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	10%	11%
\$20,000 - \$39,999	10	14	8
\$40,000 - \$59,999	13	13	15
\$60,000 - \$79,999	11	9	10
\$80,000 - \$99,999	11	13	16
\$100,000 - \$119,999	11	7	5
\$120,000 - \$139,999	7	3	2
\$140,000 - \$159,999	6	3	3
\$160,000 - \$179,999	4	3	3
\$180,000 - \$199,999	3	-	-
\$200,000 and over	18	26	28
Total	100%	100%	100%
Average Annual Income	\$107,200	\$103,800	\$108,300

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