

CHARACTERISTICS OF TRAVELERS FROM BRAZIL TO CALIFORNIA - 2014

Brazil was one of California's large overseas markets with approximately 220,000 visitors to the state in 2014. Collectively visitors from Brazil spent approximately \$442 million in California.

Brazilian visitors to California during 2014 reported spending \$157 per day during a 12.8 night average stay or approximately \$2,008 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

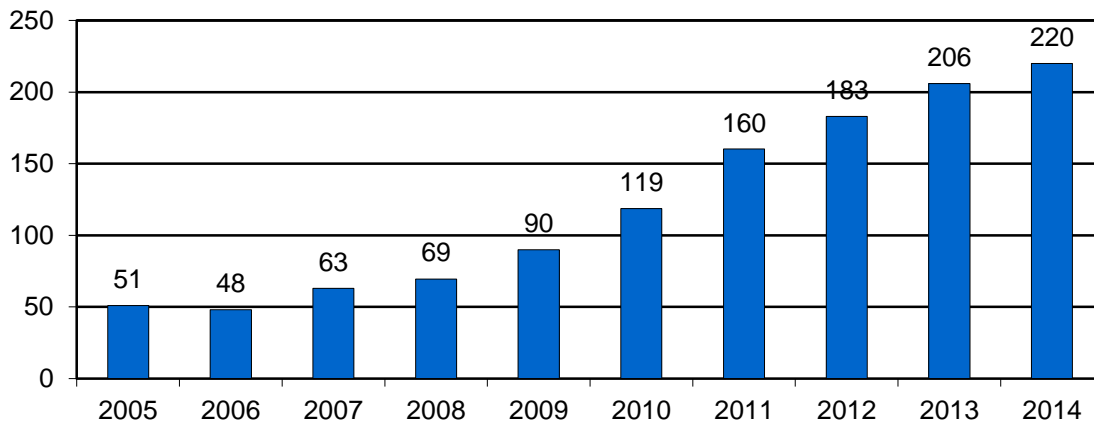
Visitors from Brazil

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2004	384,734	22.1%	85,000
2005	485,373	10.5%	51,000
2006	525,271	9.1%	48,000
2007	636,431	9.9%	63,000
2008	769,232	9.0%	69,000
2009	892,611	10.1%	90,000
2010	1,197,866	9.9%	119,000
2011	1,508,279	10.6%	160,000
2012	1,791,103	10.2%	183,000
2013	2,060,291	10.0%	206,000
2014	2,263,865	9.7%	220,000

1) U.S. Dept of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

Number of Visitors from Brazil to CA, 2005-2014 (in 000s)



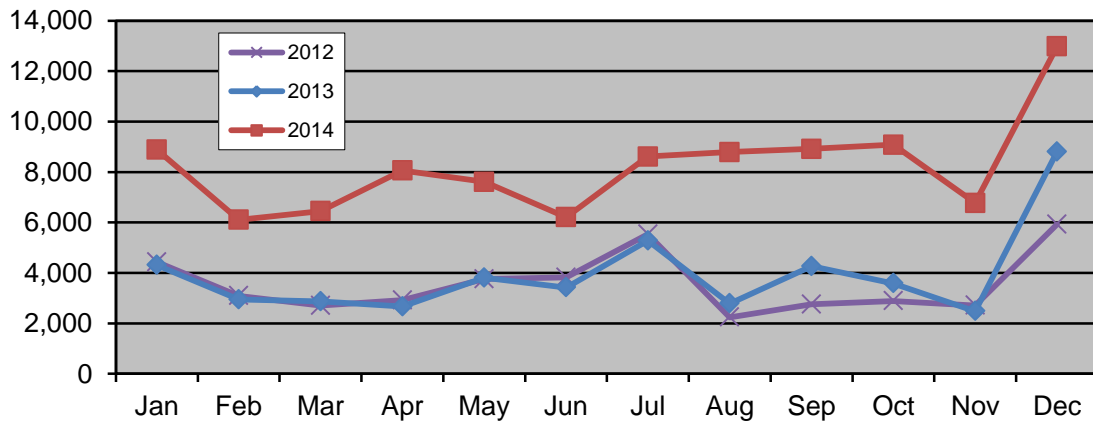
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.
Revised by Tourism Economics for Visit California (October, 2015).

From 1997 to 2006 visitor volume to California from Brazil dropped from 178,000 to a low of 48,000. Since then it has shown a steady increase and the number of visitors to California from Brazil is up to a high of 220,000 in 2014. 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. In 2014 it had risen up to over 2.2 million.

Brazilian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Brazil to California were much higher or during all months of 2014 than in previous years. In general, Brazilian resident arrivals at California ports-of-entry peaked in December. For 2014, the lowest volumes were recorded in February, June, and November, and the highest for December.

**Residents of Brazil
Monthly Port of Entry Arrivals to CA
2012-2014**



Sources: U.S. Department of Homeland Security, I-94 International Arrival Records, CIC Research, Inc., Visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

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:

- Plan their trip with information from airlines, personal recommendations, an online travel agency, and government travel offices
- Select an airline due to airfare
- Have a longer stay in the U.S.
- Visit Las Vegas, Monterey-Salinas, Miami, or San Diego as part of their trip
- Visit amusement/theme parks and concerts/plays/musicals
- Use a rented auto or airlines for transportation in the U.S.
- Spend more while in the U.S.
- Spend a higher percentage of their travel dollar on gifts and souvenirs, and a lower percentage on accommodation in the U.S.
- Pay for their trip expenses with cash from home/travelers checks
- Have a lower annual household income

Conversely, visitors from Brazil are less likely to:

- Make use of a travel package
- Spend their U.S. nights in California
- Experience fine dining.
- Use a taxicab/limousine for transportation in the U.S.

Characteristics of Travelers from Brazil to California, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Brazil (n = 277)	Leisure Visitors from Brazil (n = 174)
Primary Purpose of Trip			
Vacation/Holidays	54%	56%	83%
Visit Friends/Relatives	18%	11%	17%
Business	13%	9%	-
Convention/Conference	8%	6%	-
Other Purpose	7%	18%	-
Total	100%	100%	
Purpose of Trip**			
Vacation/Holidays	66%	69%	86%
Visit Friends/Relatives	34%	26%	29%
Business	18%	11%	3%
Convention/Conference	12%	9%	1%
Sources Used to Plan Trip**			
Airline	43%	54%	49%
Online Travel Agency	32%	45%	50%
Travel Agency Office	25%	21%	18%
Personal Recommendation	29%	47%	49%
Travel Guide	15%	18%	20%
Corporate Travel Department	12%	15%	11%
Tour Operator/Travel Club	10%	12%	13%
National/State/City Travel Office	8%	27%	27%
Advance Planning for Trip			
7 days or less	5%	4%	4%
8 - 30 days	25%	16%	10%
31 - 60 days	19%	25%	20%
61 - 90 days	15%	24%	28%
More than 3 Months	36%	31%	39%
Total	100%	100%	100%
Average Planning Time in Days	106 days	98 days	105 days
Advance Airline Reservations			
7 days or less	9%	6%	4%
8 - 30 days	35%	35%	25%
31 - 60 days	19%	22%	16%
61 - 90 days	12%	18%	26%
91 - 120 days	8%	10%	16%
121 - 180 days	10%	7%	11%
6 Months or More	8%	2%	2%
Total	100%	100%	100%
Average Booking in Days	74 days	65 days	81 days

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

** Multiple response question. The column may sum to more than 100%.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Brazil to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Brazil (n = 277)	Leisure Visitors from Brazil (n = 174)
Means of Booking Air Trip**			
Travel Agency Office	29%	23%	22%
Airlines Directly	29%	32%	36%
Internet Booking Service	27%	31%	28%
Corporate Travel Department	12%	11%	5%
Tour Operator/Travel Club	10%	14%	20%
Other	1%	2%	3%
Main Factor in Selecting Airline			
Airfare	31%	55%	49%
Non-Stop Flights	19%	11%	11%
Convenient Schedule	14%	11%	14%
Previous Good Experience	8%	3%	2%
Mileage Bonus/Frequent Flyer Program	6%	9%	10%
Safety Reputation	6%	1%	1%
Loyalty to Carrier	3%	1%	1%
In-flight Service Reputation	3%	<1%	-
Employer policy	2%	1%	1%
On-time Reputation	2%	1%	1%
Other	5%	6%	10%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	85%	87%
Premium Economy	9%	10%	7%
Executive/Business	8%	5%	6%
First Class	1%	-	-
Total	100%	100%	100%
Use of Package			
Yes	15%	8%	9%
No	85%	92%	91%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	4%	5%
Bus/Coach	6%	3%	4%
Guided Tours	6%	<1%	1%
Meals	6%	2%	3%
Rental Car	5%	4%	5%
Tour Guide for Entire Trip	4%	<1%	1%
Airfare and Accommodation Only	2%	2%	1%
Cruise	2%	<1%	<1%
Recreation	2%	<1%	1%

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

** Multiple response question. Travel package must include airfare and accommodation and may include others.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from Brazil to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Brazil (n = 277)	Leisure Visitors from Brazil (n = 174)
Travel Companions**			
Traveling Alone	59%	64%	47%
Spouse/Partner	22%	21%	31%
Family/Relatives	15%	12%	21%
Friends	6%	7%	9%
Business Associates	3%	1%	1%
Tour Group	1%	-	-
Average Travel Party Size	1.7	1.6	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	83%	84%
Private Home	30%	22%	20%
Other	6%	4%	4%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	32.3 nights	16.0 nights
Mean Nights in California	12.2 nights	12.8 nights	10.3 nights
% of California Nights	52%	40%	64%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	21%	17%
Average Trips to the U.S. in Past Year	1.7 trips	2.0 trips	2.0 trips
Average Number of States Visited	2.1 states	2.0 states	2.1 states
Average Number of Destinations Visited	3.1 dest.	3.1 dest.	3.4 dest.
Places Visited in the U.S.**			
Los Angeles	62%	67%	74%
San Francisco	44%	36%	42%
Las Vegas	29%	38%	50%
New York City	16%	12%	9%
San Diego	14%	22%	22%
Anaheim-Santa Ana	8%	8%	9%
Flagstaff-Grand Canyon-Sedona	7%	4%	6%
San Jose	6%	4%	3%
Monterey-Salinas	5%	10%	14%
DC Metro Area	4%	2%	4%
Riverside/San Bernardino	4%	2%	2%
Santa Barbara	4%	6%	9%
Chicago	3%	6%	4%
Oahu	3%	3%	2%
Seattle	3%	2%	2%
Sacramento	3%	4%	3%
Miami	3%	10%	11%

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**Characteristics of Travelers from Brazil to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Brazil (n = 277)	Leisure Visitors from Brazil (n = 174)
Activities Experienced While in the U.S.**			
Shopping	89%	92%	95%
Sightseeing	83%	83%	87%
National Parks/Monuments	52%	54%	59%
Small Towns/Countryside	44%	37%	39%
Experience Fine Dining	43%	28%	31%
Amusement/Theme Parks	40%	51%	53%
Historical Locations	35%	40%	44%
Guided Tours	33%	25%	29%
Art Gallery/Museums	31%	32%	34%
Casino/Gamble	24%	23%	26%
Concert/Play/Musical	21%	38%	38%
Cultural/Ethnic Heritage Sites	20%	13%	14%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	58%	55%
Rented Auto	44%	59%	64%
Auto, Private or Company	38%	38%	29%
City Subway/Tram/Bus	31%	23%	12%
Taxicab/Limousine	31%	21%	12%
Bus between Cities	19%	16%	15%
Ferry/River Taxi/Srt. Scenic Cruise	10%	8%	7%
Railroad between Cities	7%	1%	-
Rented Bicycle/Motorcycle/Moped	5%	7%	3%
Cruise Ship/River Boat 1+ Nights	4%	3%	4%
Motor Home/Camper	2%	1%	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$5,067	\$5,163
Per Visitor Per Day (CA)	\$153	\$157	\$323
Per Visitor/Trip (California)	\$1,872	\$2,008	\$3,324
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	22.3%	19.4%
Air Transportation in the U.S.	6.6%	6.6%	6.1%
Entertainment	12.5%	14.1%	15.8%
Food/Beverages	18.1%	14.0%	14.2%
Gifts/Souvenirs	21.1%	34.4%	35.7%
Ground Transportation in the U.S.	6.2%	6.7%	7.3%
Other	4.9%	1.9%	1.6%

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** Multiple response question. The column may sum to more than 100%.

*** Spending estimates were based on the SIAT data and revised by Tourism Economics for Visit California.

Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."
CIC Research, Inc. and Tourism Economics

**Characteristics of Travelers from Brazil to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Brazil (n = 277)	Leisure Visitors from Brazil (n = 174)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	36%	34%
Cash from Home/Travelers Checks	27%	43%	52%
Cash Adv./Withdrawal Using Credit Card	18%	12%	9%
Cash Adv./Withdrawal Using Debit Card	6%	4%	2%
Purchases Using Debit Card	6%	4%	3%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	37 years	42 years
Average Age - Females	38 years	34 years	37 years
Occupation			
Mgmt., Business, Science & Arts	44%	43%	41%
Service Occupations	11%	14%	16%
Student	11%	15%	6%
Sales and Office	11%	10%	11%
Retired	8%	3%	5%
Homemaker	4%	3%	4%
Prod., Trans., & Material Moving	4%	<1%	-
Nat. Res., Const., & Maintenance	3%	3%	5%
Military/Government	2%	5%	8%
Other	2%	5%	6%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	31%	26%
\$20,000 - \$39,999	13%	14%	16%
\$40,000 - \$59,999	14%	13%	11%
\$60,000 - \$79,999	11%	7%	10%
\$80,000 - \$99,999	10%	2%	3%
\$100,000 - \$119,999	9%	7%	6%
\$120,000 - \$139,999	6%	4%	6%
\$140,000 - \$159,999	4%	4%	4%
\$160,000 - \$179,999	3%	3%	3%
\$180,000 - \$199,999	2%	2%	3%
\$200,000 and over	11%	12%	13%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$81,336	\$92,790

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Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."