

## CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2014

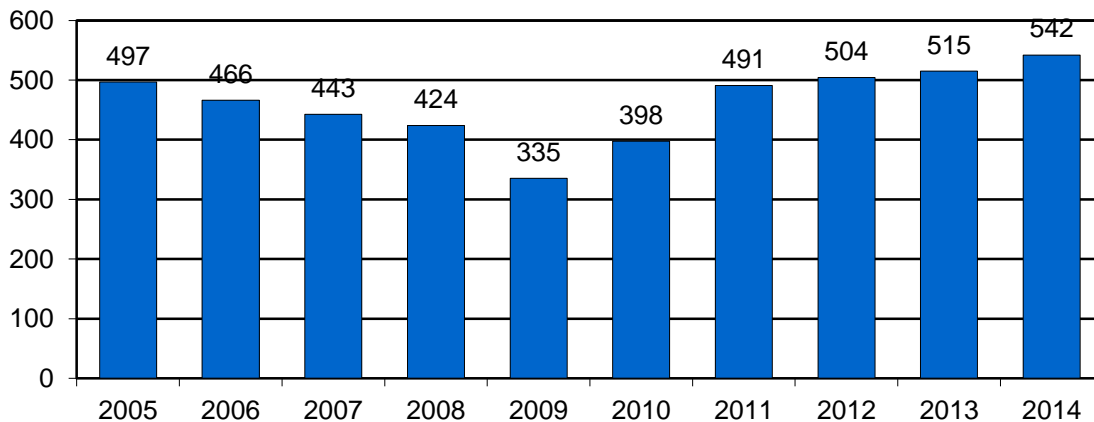
Air travelers from Mexico represent one of the largest international markets for California with approximately 542,000 visitors to the state in 2014. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$526 million in California.

Visitors from Mexico to California in 2014, who arrived in the U.S. by air, reported spending \$135 per day during a 7.2 night average stay in California or approximately \$970 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 Mexico  
Arriving in the U.S. by Air<sup>1</sup>**

Year	Total U.S. Arrivals	California Market Share	Visitors to California (est.)
2004	1,493,971	27.8%	415,000
2005	1,668,432	29.8%	497,000
2006	1,713,158	27.2%	466,000
2007	1,878,399	23.6%	443,000
2008	1,708,320	24.8%	424,000
2009	1,511,110	22.2%	335,000
2010	1,674,913	23.8%	398,000
2011	1,949,712	25.2%	491,000
2012	2,117,951	23.8%	504,000
2013	2,218,268	23.2%	515,000
2014	2,357,676	23.0%	542,000

**Visitors to California from Mexico Arriving in the U.S. by Air<sup>1</sup>  
(2004-2014; in thousands)**



<sup>1</sup> Sources: U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.  
U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

Over the last 10 years Mexican air travelers who visited California have recorded varying shifts in market share. Visitors to California from Mexico (arriving in the U.S. by air) had peaked at 497,000 in 2005. From 2006 to 2009 the visitor volume decreased each year to a low of 335,000 visitors in 2009. Recovery in the volume of Mexican air travelers visiting California began in 2010. In 2011 it jumped 100,000 to 491,000 and has continued to increase since then to 542,000 in 2014.

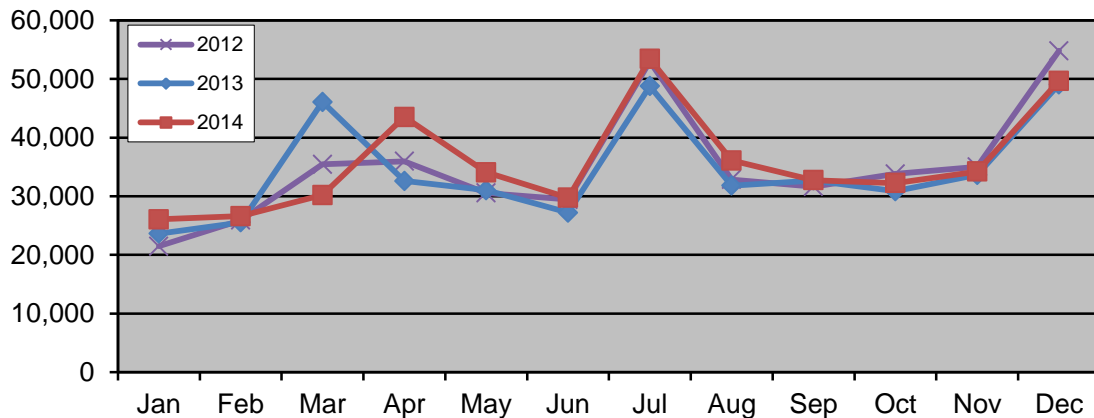
### Mexican Visitors to California Arriving by Land and Air (Estimated)

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 7.03 million visitors for 2014 (6.96 million in 2013). Total Mexican visitors to California (arriving in the U.S. by air or land) in 2014 was estimated at 7.57 million visitors (7.48 million in 2013). The volume of Mexican visitors to the state increased approximately 1.3% for 2014, but was still 12% below the peak of almost 8.6 million in 2005.<sup>2</sup>

### Mexican Arrivals at California Airports

Monthly volumes of port-of-entry air passenger arrivals from Mexico to California in 2014 were similar to 2013 and 2012. 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)  
2012-2014<sup>1</sup>**



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

<sup>2</sup> Source: Mexican visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

## 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:

- Use a city, state, or national travel office to plan their trip
- Plan and book their trip directly with the airline
- Have decidedly shorter trip planning and advance airline booking horizons
- Stay in a private home
- Stay less time in the U.S. and CA
- Travel to fewer states and destinations
- Visit Anaheim-Santa Ana
- Spend money on gifts/souvenirs
- Make travel purchases with cash from home or travelers checks
- Have a lower average annual income

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

- Use a travel guide to plan their trip
- Travel with a spouse/partner
- Stay in a hotel/motel
- Be on their first trip to the U.S.
- Travel to destinations which are further from Mexico such as San Francisco, New York City and Las Vegas
- Experience many of the listed leisure activities
- Use air travel between cities or city subway/tram/bus for transportation while in the U.S.
- Spend money per visitor per trip while in the U.S. as well as in California
- Spend money on accommodation
- Make travel purchases with a credit card

**Characteristics of Visitors to California from Overseas Countries and Mexico  
Who Arrived in the U.S. by Air (2014)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors to CA* (n = 8,032)</b>	<b>All Visitors to CA from Mexico (Air) (n = 381)</b>	<b>Leisure Visitors to CA from Mexico (Air) (n = 254)</b>
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	55%	71%
Visit Friends/Relatives	18%	23%	29%
Business	13%	11%	-
Convention/Conference	8%	5%	-
Other Purpose	7%	7%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	66%	65%	79%
Visit Friends/Relatives	34%	40%	41%
Business	18%	14%	2%
Convention/Conference	12%	6%	-
<b>Sources Used to Plan Trip**</b>			
Airline	43%	52%	54%
Online Travel Agency	32%	25%	24%
Travel Agency Office	25%	20%	24%
Personal Recommendation	29%	27%	29%
Travel Guide	15%	5%	6%
Corporate Travel Department	12%	10%	5%
Tour Operator/Travel Club	10%	5%	6%
National/State/City Travel Office	8%	24%	29%
<b>Advance Planning for Trip</b>			
7 days or less	5%	11%	7%
8 - 30 days	25%	33%	30%
31 - 60 days	19%	26%	28%
61 - 90 days	15%	9%	11%
More than 3 Months	36%	21%	25%
Total	100%	100%	100%
Average Planning Time in Days	106 days	68 days	78 days
<b>Advance Airline Reservations</b>			
7 days or less	9%	21%	15%
8 - 30 days	35%	43%	41%
31 - 60 days	19%	18%	22%
61 - 90 days	12%	6%	8%
91 - 120 days	8%	4%	3%
121 - 180 days	10%	7%	9%
6 Months or More	8%	1%	2%
Total	100%	100%	100%
Average Booking in Days	74 days	44 days	49 days

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

\*\* Multiple response question; the column may add to more than 100%.

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

**Characteristics of Visitors to California from Overseas Countries and Mexico  
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<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors to CA* (n = 8,032)</b>	<b>All Visitors to CA from Mexico (Air) (n = 381)</b>	<b>Leisure Visitors to CA from Mexico (Air) (n = 254)</b>
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	29%	25%	28%
Airlines Directly	29%	46%	53%
Internet Booking Service	27%	22%	20%
Corporate Travel Department	12%	10%	4%
Tour Operator/Travel Club	10%	4%	4%
Other	1%	3%	2%
<b>Main Factor in Selecting Airline</b>			
Airfare	31%	38%	37%
Non-Stop Flights	19%	15%	18%
Convenient Schedule	14%	21%	12%
Previous Good Experience	8%	5%	6%
Mileage Bonus/Frequent Flyer Program	6%	6%	7%
Safety Reputation	6%	<1%	1%
Loyalty to Carrier	3%	4%	7%
In-flight Service Reputation	3%	1%	1%
Employer policy	2%	1%	<1%
On-time Reputation	2%	1%	<1%
Other	5%	8%	12%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	83%	83%	84%
Premium Economy	9%	7%	7%
Executive/Business	8%	3%	3%
First Class	1%	6%	6%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	13%	17%
No	85%	87%	83%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	7%	5%	7%
Bus/Coach	6%	3%	4%
Guided Tours	6%	2%	3%
Meals	6%	3%	4%
Rental Car	5%	5%	8%
Tour Guide for Entire Trip	4%	2%	2%
Airfare and Accommodation Only	2%	2%	3%
Cruise	2%	<1%	<1%
Recreation	2%	1%	2%

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\*\*Multiple response question; a travel package must include airfare and accommodations and may include other travel package items.

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

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<b>Travel Companions**</b>			
Traveling Alone	59%	64%	54%
Spouse/Partner	22%	11%	14%
Family/Relatives	15%	22%	31%
Friends	6%	5%	6%
Business Associates	3%	2%	<1%
Tour Group	1%	<1%	1%
<b>Average Travel Party Size</b>	1.7	1.7	2.0
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	62%	56%
Private Home	30%	44%	49%
Other	6%	1%	2%
<b>Length of Stay</b>			
Mean Nights in the U.S.	23.4 nights	12.4 nights	14.3 nights
Mean Nights in California	12.2 nights	7.2 nights	7.8 nights
% of California Nights	52%	58%	55%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	14%	17%
Average Trips to the U.S. in Past Year	1.7 trips	2.6 trips	2.2 trips
<b>Average Number of States Visited</b>	2.1 states	1.4 states	1.5 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	2.1 dest.	2.3 dest
<b>Places Visited in the U.S.**</b>			
Los Angeles	62%	66%	68%
San Francisco	44%	19%	21%
Las Vegas	29%	9%	11%
New York City	16%	2%	3%
San Diego	14%	11%	9%
Anaheim-Santa Ana	8%	19%	22%
Flagstaff-Grand Canyon-Sedona	7%	<1%	1%
San Jose	6%	5%	4%
Monterey-Salinas	5%	<1%	<1%
DC Metro Area	4%	2%	3%
Riverside/San Bernardino	4%	3%	2%
Santa Barbara	4%	4%	5%
Chicago	3%	1%	1%
Oahu	3%	<1%	<1%
Seattle	3%	2%	2%
Sacramento	3%	<1%	<1%
Miami	3%	1%	<1%

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\*\* Multiple response question; the column may add to more than 100%.

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

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<b>Activities Experienced While in the U.S.**</b>			
Shopping	89%	82%	80%
Sightseeing	83%	64%	72%
National Parks/Monuments	52%	22%	25%
Small Towns/Countryside	44%	22%	26%
Experience Fine Dining	43%	34%	30%
Amusement/Theme Parks	40%	43%	50%
Historical Locations	35%	23%	27%
Guided Tours	33%	13%	14%
Art Gallery/Museums	31%	14%	14%
Casino/Gamble	24%	9%	10%
Concert/Play/Musical	21%	4%	4%
Cultural/Ethnic Heritage Sites	20%	14%	15%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	45%	22%	21%
Rented Auto	44%	41%	38%
Auto, Private or Company	38%	44%	49%
City Subway/Tram/Bus	31%	15%	15%
Taxicab/Limousine	31%	22%	20%
Bus between Cities	19%	16%	19%
Ferry/River Taxi/Srt. Scenic Cruise	10%	3%	3%
Railroad between Cities	7%	5%	6%
Rented Bicycle/Motorcycle/Moped	5%	1%	1%
Cruise Ship/River Boat 1+ Nights	4%	1%	2%
Motor Home/Camper	2%	-	-
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$1,670	\$1,632
Per Visitor Per Day (CA)	\$153	\$135	\$114
Per Visitor/Trip (California)	\$1,872	\$970	\$890
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	30.4%	16.3%	10.7%
Air Transportation in the U.S.	6.6%	8.9%	6.5%
Entertainment	12.5%	14.6%	19.8%
Food/Beverages	18.1%	16.0%	17.1%
Gifts/Souvenirs	21.1%	32.9%	35.6%
Ground Transportation in the U.S.	6.2%	7.0%	6.2%
Other	4.9%	4.2%	4.4%

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\*\*\*Caution – Small sample size

\*\*\*\* Spending estimates prepared by Tourism Economics and CIC Research, Inc., (October 2015).

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

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	30%	24%
Cash from Home/Travelers Checks	27%	42%	45%
Cash Adv./Withdrawal Using Credit Card	18%	15%	20%
Cash Adv./Withdrawal Using Debit Card	6%	8%	7%
Purchases Using Debit Card	6%	5%	5%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	40 years	39 years	41 years
Average Age - Females	38 years	36 years	37 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	44%	35%	28%
Service Occupations	11%	10%	11%
Student	11%	13%	10%
Sales and Office	11%	12%	12%
Retired	8%	6%	9%
Homemaker	4%	12%	14%
Prod., Trans., & Material Moving	4%	1%	1%
Nat. Res., Const., & Maintenance	3%	9%	12%
Military/Government	2%	4%	4%
Other	2%	<1%	<1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	46%	56%
\$20,000 - \$39,999	13%	14%	8%
\$40,000 - \$59,999	14%	18%	16%
\$60,000 - \$79,999	11%	3%	1%
\$80,000 - \$99,999	10%	3%	3%
\$100,000 - \$119,999	9%	5%	3%
\$120,000 - \$139,999	6%	1%	1%
\$140,000 - \$159,999	4%	2%	2%
\$160,000 - \$179,999	3%	1%	-
\$180,000 - \$199,999	2%	-	-
\$200,000 and over	11%	9%	10%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$56,233	\$55,815

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