

## CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2015

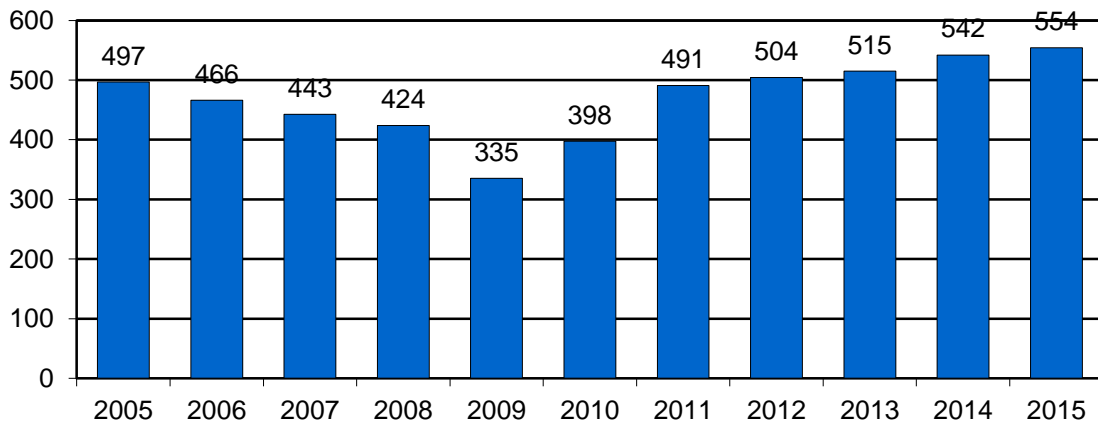
Air travelers from Mexico represent one of the largest international markets for California with approximately 554,000 visitors to the state in 2015. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$586 million in California.

Visitors from Mexico to California in 2015, who arrived in the U.S. by air, reported spending \$141 per day during a 7.5 night average stay in California or approximately \$1,058 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 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.)
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
2015	2,268,833	24.4%	554,000

**Visitors to California from Mexico Arriving in the U.S. by Air<sup>1</sup>  
(2005 - 2015 in 000s)**



<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 554,000 in 2015. In 2015, the California market share of Mexican air travelers is at 24%.

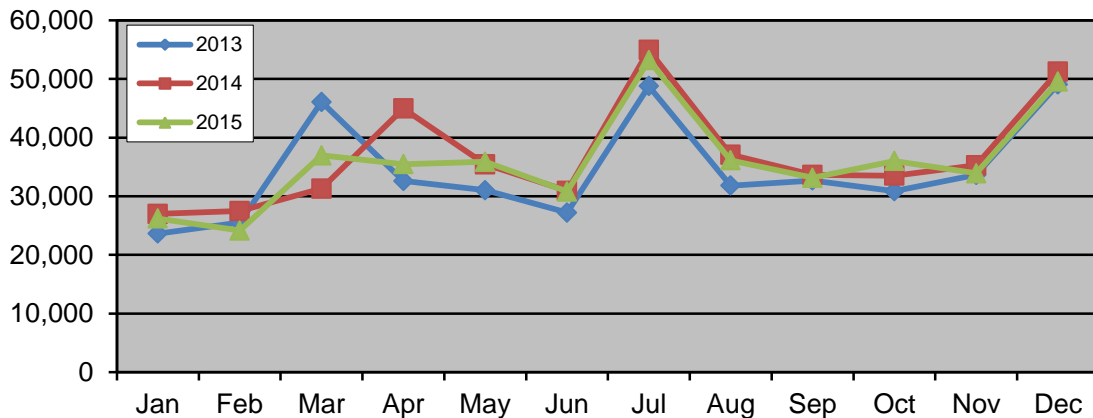
### Mexican Visitors to California Arriving by Land and Air (Estimated)

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 7.25 million visitors for 2015 (7.03 million in 2014). Total Mexican visitors to California (arriving in the U.S. by air or land) in 2015 was estimated at 7.80 million visitors (7.57 million in 2014). The volume of Mexican visitors to the state increased approximately 3.0% for 2015, but was still 9% 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 2015 were similar to 2014 and 2013. 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)  
2013-2015<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:

- Plan and book their trip directly with the airline
- Have decidedly shorter trip planning and advance airline booking horizons
- Choose an airline mainly for having non-stop flights
- 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 use of a private or company auto for transportation while in the U.S.
- 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 agency office or a travel guide to plan their trip
- 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 multiple leisure activities
- Use a rented auto, air travel between cities, city subway/tram/bus, or a taxicab/limousine 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 (2015)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors to CA* (n = 8,348)</b>	<b>All Visitors to CA from Mexico (Air) (n = 372)</b>	<b>Leisure Visitors to CA from Mexico (Air) (n = 263)</b>
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	54%	65%
Visit Friends/Relatives	18%	29%	35%
Business	13%	10%	-
Convention/Conference	9%	4%	-
Other Purpose	6%	2%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	68%	78%
Visit Friends/Relatives	34%	50%	55%
Business	17%	13%	<1%
Convention/Conference	12%	7%	<1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	51%	51%
Online Travel Agency	34%	29%	30%
Personal Recommendation	29%	28%	29%
Travel Agency Office	23%	11%	13%
Travel Guide	15%	4%	4%
Corporate Travel Department	12%	8%	3%
Tour Operator/Travel Club	9%	4%	4%
National/State/City Travel Office	7%	14%	14%
<b>Advance Planning for Trip</b>			
7 days or less	5%	9%	6%
8 - 30 days	24%	41%	36%
31 - 60 days	19%	26%	31%
61 - 90 days	15%	10%	10%
More than 3 Months	38%	15%	17%
Total	100%	100%	100%
Average Planning Time in Days	108 days	60 days	65 days
<b>Advance Airline Reservations</b>			
7 days or less	8%	17%	13%
8 - 30 days	33%	50%	50%
31 - 60 days	20%	18%	21%
61 - 90 days	13%	7%	7%
91 - 120 days	9%	1%	1%
121 - 180 days	10%	6%	7%
6 Months or More	8%	<1%	<1%
Total	100%	100%	100%
Average Booking in Days	76 days	38 days	42 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>Means of Booking Air Trip**</b>			
Airlines Directly	31%	45%	47%
Internet Booking Service	29%	30%	32%
Travel Agency Office	26%	22%	23%
Corporate Travel Department	12%	10%	3%
Tour Operator/Travel Club	9%	3%	2%
Other	1%	<1%	<1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	34%	36%
Non-Stop Flights	17%	28%	28%
Convenient Schedule	15%	23%	23%
Previous Good Experience	9%	4%	4%
Mileage Bonus/Frequent Flyer Program	8%	3%	3%
Safety Reputation	9%	<1%	1%
Loyalty to Carrier	3%	4%	5%
In-flight Service Reputation	3%	1%	<1%
Employer policy	3%	<1%	-
On-time Reputation	2%	1%	1%
Other	3%	1%	1%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	84%	85%
Premium Economy	10%	9%	9%
Executive/Business	8%	4%	4%
First Class	1%	4%	3%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	5%	5%
No	86%	95%	96%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	4%	4%
Meals	6%	1%	1%
Bus/Coach	6%	3%	3%
Guided Tours	6%	2%	2%
Rental Car	4%	-	-
Tour Guide for Entire Trip	5%	1%	1%
Airfare and Accommodation Only	3%	1%	<1%
Cruise	2%	-	-
Recreation	1%	1%	1%

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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%	58%
Spouse/Partner	22%	17%	22%
Family/Relatives	15%	20%	24%
Friends	6%	2%	3%
Business Associates	4%	1%	-
Tour Group	1%	<1%	<1%
<b>Average Travel Party Size</b>	1.7	1.6	1.7
<b>Median Travel Party Size</b>	1.0	1.3	1.4
<b>Type of Lodging**</b>			
Hotel / Motel	73%	58%	53%
Private Home	32%	45%	51%
Other	6%	4%	4%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	12.1 nights	12.2 nights
Mean Nights in California	12.6 nights	7.5 nights	8.0 nights
% of California Nights	52%	62%	66%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	17%	21%
Average Trips to the U.S. in Past Year	1.7 trips	2.4 trips	2.1 trips
<b>Average Number of States Visited</b>	2.0 states	1.2 states	states
<b>Average Number of Destinations Visited</b>	3.1 dest.	1.9 dest.	dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	59%	59%
San Francisco	45%	17%	17%
Las Vegas	30%	8%	10%
New York City	15%	<1%	-
San Diego	14%	4%	4%
Anaheim-Santa Ana	8%	18%	22%
Flagstaff-Grand Canyon-Sedona	7%	-	-
San Jose	6%	5%	2%
DC Metro Area	5%	-	-
Monterey-Salinas	5%	<1%	<1%
Santa Barbara	4%	4%	3%
Riverside/San Bernardino	4%	5%	5%
Oahu	3%	<1%	<1%
Seattle	3%	1%	2%
Chicago	3%	<1%	<1%
Miami	2%	1%	-
Sacramento	2%	5%	3%

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<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	86%	86%
Sightseeing	83%	75%	79%
National Parks/Monuments	51%	30%	31%
Small Towns/Countryside	42%	23%	20%
Experience Fine Dining	40%	32%	33%
Amusement/Theme Parks	39%	37%	43%
Historical Locations	34%	16%	17%
Guided Tours	31%	15%	14%
Art Gallery/Museums	33%	16%	15%
Casino/Gamble	24%	14%	18%
Cultural/Ethnic Heritage Sites	20%	18%	17%
Concert/Play/Musical	20%	5%	6%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	30%	26%
Air Travel between U.S. Cities	44%	22%	21%
Auto, Private or Company	37%	48%	49%
City Subway/Tram/Bus	31%	14%	14%
Taxicab/Limousine	31%	20%	17%
Bus between Cities	19%	14%	14%
Ferry/River Taxi/Srt. Scenic Cruise	10%	5%	5%
Railroad between Cities	7%	3%	1%
Rented Bicycle/Motorcycle/Moped	5%	3%	4%
Cruise Ship/River Boat 1+ Nights	4%	3%	3%
Motor Home/Camper	2%	-	-
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$1,520	\$1,515
Per Visitor Per Day (CA)	\$157	\$141	\$138
Per Visitor/Trip (California)	\$1,979	\$1,058	\$1,102
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	25.5%	22.0%
Air Transportation in the U.S.	5.9%	5.1%	5.7%
Entertainment	12.9%	13.9%	16.0%
Food/Beverages	19.9%	18.4%	19.7%
Gifts/Souvenirs	19.2%	27.9%	27.2%
Ground Transportation in the U.S.	6.3%	5.3%	6.0%
Other	4.2%	4.0%	3.3%

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

\*\*\*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	43%	32%	29%
Cash from Home/Travelers Checks	27%	38%	43%
Cash Adv./Withdrawal Using Credit Card	18%	13%	11%
Cash Adv./Withdrawal Using Debit Card	6%	8%	8%
Purchases Using Debit Card	6%	9%	8%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	41 years	41 years
Average Age - Females	38 years	36 years	36 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	42%	42%
Service Occupations	11%	7%	7%
Student	12%	11%	11%
Sales and Office	11%	18%	14%
Retired	8%	6%	7%
Homemaker	4%	3%	4%
Prod., Trans., & Material Moving	3%	4%	4%
Military/Government	3%	4%	4%
Nat. Res., Const., & Maintenance	3%	5%	5%
Other	1%	2%	2%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	43%	48%
\$20,000 - \$39,999	15%	19%	16%
\$40,000 - \$59,999	15%	8%	10%
\$60,000 - \$79,999	14%	6%	4%
\$80,000 - \$99,999	10%	4%	3%
\$100,000 - \$119,999	10%	4%	4%
\$120,000 - \$139,999	4%	3%	1%
\$140,000 - \$159,999	4%	2%	1%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	1%	1%	1%
\$200,000 and over	10%	10%	12%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$66,879	\$70,417

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