

## CHARACTERISTICS OF TRAVELERS FROM SOUTH AMERICA TO CALIFORNIA – 2013

South America was one of California's large overseas markets with approximately 427,000 visitors to California in 2013. Collectively visitors from South America spent approximately \$723 million in California.

South American visitors to California during 2013 reported spending \$132 per day during a 12.8 night average stay or approximately \$1,694 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

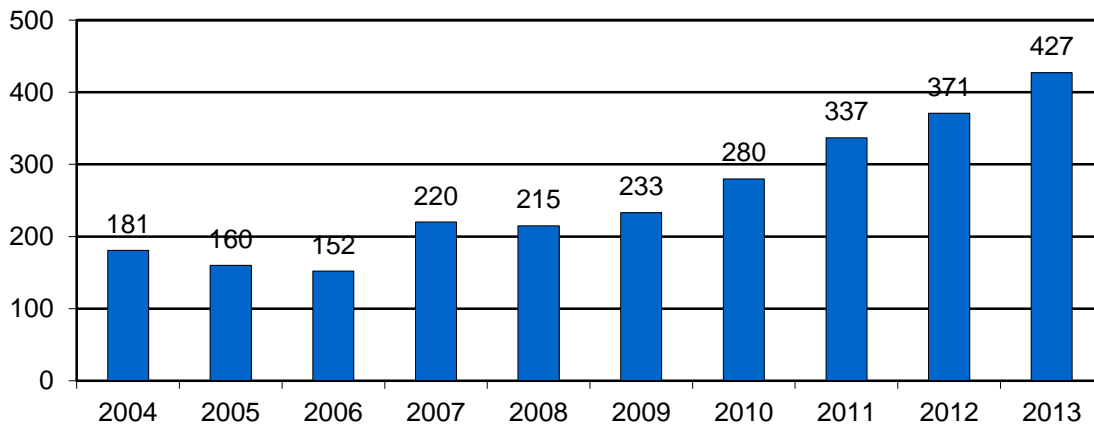
### Visitors From South America

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
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	9.7%	220,000
2008	2,555,599	8.5%	216,000
2009	2,741,535	8.5%	233,000
2010	3,250,298	8.6%	280,000
2011	3,756,689	9.0%	337,000
2012	4,416,175	8.4%	371,000
2013	5,141,987	8.3%	427,000

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 South America to CA, 2004-2013 (in 000s)



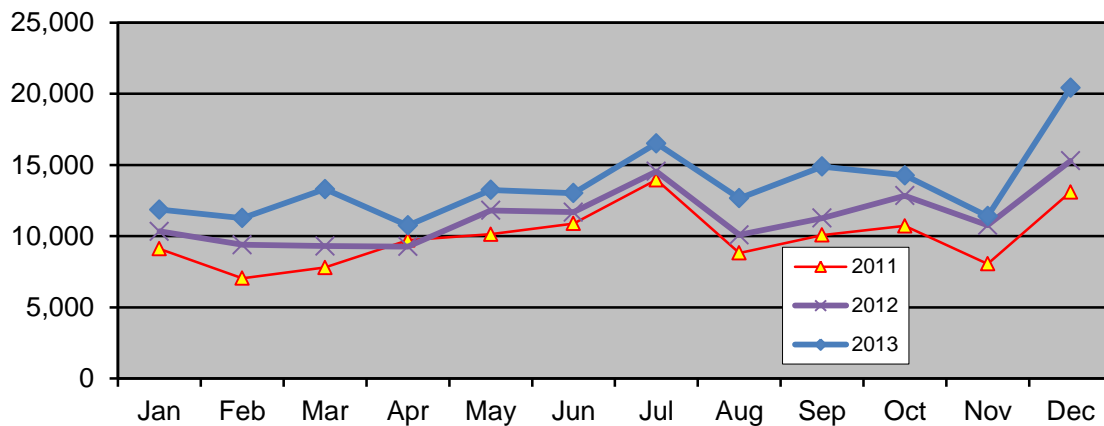
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

In past 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 fluctuated up and down until 2006. There has since been growth in the visitor volume from 152,000 visitors in 2006 to 427,000 visitors in 2013. Nevertheless, the volume of visitors to California from South America still remains slightly below the peak level 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 mostly higher in 2013 compared with 2012 and 2011. In 2013, South American resident arrivals at California ports-of-entry peaked in July and December. The lowest volume was recorded in February, April, and November.

**Residents of South America  
Monthly Port of Entry Arrivals to CA  
2011-2013**



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:

- Travel to the U.S. for the purpose of vacation/holiday
- Make use of personal recommendations to plan their trip
- Book their air trip with the airlines directly
- Consider the airfare as the main factor in selecting an airline
- Visit amusement/theme parks and attend concerts/plays/musicals
- Use air travel between cities for transportation while in the U.S.
- Spend their travel dollars on “other expenses” which include expenses in U.S. airports and medical services in the U.S.
- Have a lower average annual income

Conversely, visitors from South America are less likely to:

- Travel to the U.S. for the purpose of business
- Experience fine dining while on their trip
- Be on their first trip to the U.S.
- Spend a proportion of their travel dollars on food and beverages

### Characteristics of Travelers from South America to California – 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South America (n = 351)	Leisure Visitors from South America (n = 224)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	52%	69%	85%
Visit Friends/Relatives	17%	12%	15%
Business	15%	4%	-
Convention/Conference	9%	7%	-
Other Purpose	8%	8%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	64%	80%	90%
Visit Friends/Relatives	32%	34%	37%
Business	20%	8%	1%
Convention/Conference	12%	9%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	46%	44%
Online Travel Agency	31%	34%	38%
Travel Agency Office	26%	22%	19%
Personal Recommendation	26%	39%	43%
Travel Guide	15%	15%	14%
Corporate Travel Department	14%	12%	6%
Tour Operator/Travel Club	9%	8%	6%
National/State/City Travel Office	8%	23%	22%
<b>Advance Planning for Trip</b>			
7 days or less	5%	2%	1%
8 - 30 days	27%	23%	18%
31 - 60 days	17%	17%	16%
61 - 90 days	14%	21%	25%
More than 3 Months	36%	37%	41%
Total	100%	100%	100%
Average Planning Time in Days	105 days	113 days	118 days
<b>Advance Airline Reservations</b>			
7 days or less	10%	5%	5%
8 - 30 days	35%	35%	30%
31 - 60 days	17%	22%	20%
61 - 90 days	13%	18%	21%
91 - 120 days	8%	7%	8%
121 - 180 days	9%	9%	10%
6 Months or More	7%	5%	7%
Total	100%	100%	100%
Average Booking in Days	72 days	72 days	79 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: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from South America to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South America (n = 351)	Leisure Visitors from South America (n = 224)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	31%	26%	24%
Airlines Directly	28%	38%	35%
Internet Booking Service	24%	30%	33%
Corporate Travel Department	15%	11%	8%
Tour Operator/Travel Club	9%	8%	6%
Other	2%	1%	<1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	48%	52%
Non-Stop Flights	17%	11%	8%
Convenient Schedule	15%	14%	16%
Mileage Bonus/Frequent Flyer Program	9%	16%	14%
Previous Good Experience	9%	3%	3%
Safety Reputation	6%	3%	2%
Loyalty to Carrier	4%	1%	1%
Employer policy	3%	1%	<1%
In-flight Service Reputation	3%	1%	2%
On-time Reputation	2%	1%	1%
Other	4%	2%	1%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	79%	81%	83%
Executive/Business	10%	6%	3%
Premium Economy	10%	11%	13%
First Class	1%	2%	2%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	7%	6%
No	85%	93%	94%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	3%	1%	1%
Attractions/Events/Entertainment	7%	1%	1%
Bus/Coach	7%	1%	<1%
Cruise	2%	<1%	<1%
Guided Tours	6%	1%	1%
Meals	6%	2%	<1%
Recreation	1%	-	-
Rental Car	5%	4%	5%
Tour Guide for Entire Trip	4%	-	-

\* 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 South America to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South America (n = 351)	Leisure Visitors from South America (n = 224)
<b>Travel Companions**</b>			
Traveling Alone	61%	61%	47%
Spouse/Partner	21%	27%	37%
Family/Relatives	13%	20%	30%
Friends	6%	2%	2%
Business Associates	4%	<1%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.6	1.7	2.0
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	80%	82%
Private Home	27%	25%	22%
Other	6%	2%	1%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.5 nights	24.6 nights	17.8 nights
Mean Nights in California	12.2 nights	12.8 nights	9.9 nights
% of California Nights	54%	52%	51%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	18%	18%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.6 trips
<b>Average Number of States Visited</b>	2.0 states	2.0 states	1.9 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	2.9 dest.	3.0 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	59%	64%	67%
San Francisco	47%	44%	48%
Las Vegas	30%	35%	41%
New York City	16%	19%	15%
San Diego	13%	15%	12%
Anaheim-Santa Ana	8%	7%	5%
Flagstaff-Grand Canyon-Sedona	7%	5%	7%
San Jose	6%	2%	2%
DC Metro Area	4%	2%	1%
Monterey-Salinas	4%	6%	7%
Oahu	4%	1%	1%
Santa Barbara	3%	6%	7%
Riverside/San Bernardino	3%	4%	4%
Chicago	3%	2%	1%
Seattle	3%	2%	<1%
Sacramento	3%	6%	6%
Miami	3%	8%	6%

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**Characteristics of Travelers from South America to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from South America (n = 351)	Leisure Visitors from South America (n = 224)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	93%	93%
Sightseeing	84%	89%	94%
National Parks/Monuments	49%	47%	51%
Experience Fine Dining	43%	34%	33%
Small Towns/Countryside	41%	41%	40%
Amusement/Theme Parks	38%	51%	49%
Historical Locations	37%	35%	35%
Guided Tours	33%	31%	31%
Art Gallery/Museums	30%	31%	29%
Casino/Gamble	25%	30%	35%
Cultural/Ethnic Heritage Sites	21%	20%	18%
Concert/Play/Musical	20%	34%	40%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	46%	62%	60%
Rented Auto	43%	49%	52%
Auto, Private or Company	37%	38%	32%
City Subway/Tram/Bus	33%	27%	20%
Taxicab/Limousine	33%	26%	20%
Bus between Cities	18%	18%	18%
Ferry/River Taxi/Srt. Scenic Cruise	12%	10%	6%
Railroad between Cities	8%	4%	2%
Rented Bicycle/Motorcycle/Moped	5%	7%	8%
Cruise Ship/River Boat 1+ Nights	4%	4%	3%
Motor Home/Camper	2%	<1%	-
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor Per Visitor Per Day (CA)	\$3,577 \$159	\$5,679 \$132	\$2,418 \$136
Per Visitor/Trip (California)	\$1,940	\$1,694	\$1,345
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	29.1%	25.4%	24.3%
Air Transportation in the U.S.	6.9%	6.5%	8.9%
Entertainment	12.2%	11.1%	16.0%
Food/Beverages	17.8%	9.8%	13.0%
Gifts/Souvenirs	21.9%	19.3%	26.5%
Ground Transportation in the U.S.	5.6%	4.6%	6.0%
Other	6.3%	23.4%	5.3%

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\*\* Multiple response question. Table may add 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 South America to California  
(2013 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	46%	47%
Cash from Home/Travelers Checks	26%	32%	36%
Cash Adv./Withdrawal Using Credit Card	18%	8%	7%
Cash Adv./Withdrawal Using Debit Card	7%	5%	4%
Purchases Using Debit Card	6%	8%	5%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	42 years	41 years	41 years
Average Age - Females	39 years	39 years	42 years
<b>Occupation</b>			
Mgmt., Business, Science, & Arts	44%	39%	35%
Service Occupations	11%	9%	10%
Student	11%	13%	10%
Sales and Office	10%	14%	16%
Retired	8%	9%	12%
Homemaker	5%	5%	6%
Prod., Trans., & Material Moving	4%	2%	2%
Military/Government	4%	4%	5%
Nat. Res., Const., & Maintenance	3%	3%	3%
Other	2%	3%	-
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	19%	20%
\$20,000 - \$39,999	14%	26%	32%
\$40,000 - \$59,999	14%	15%	12%
\$60,000 - \$79,999	12%	10%	9%
\$80,000 - \$99,999	10%	3%	2%
\$100,000 - \$119,999	8%	5%	5%
\$120,000 - \$139,999	6%	3%	3%
\$140,000 - \$159,999	5%	8%	7%
\$160,000 - \$179,999	3%	1%	2%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	12%	10%	8%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$86,555	\$79,933

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