

CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2013

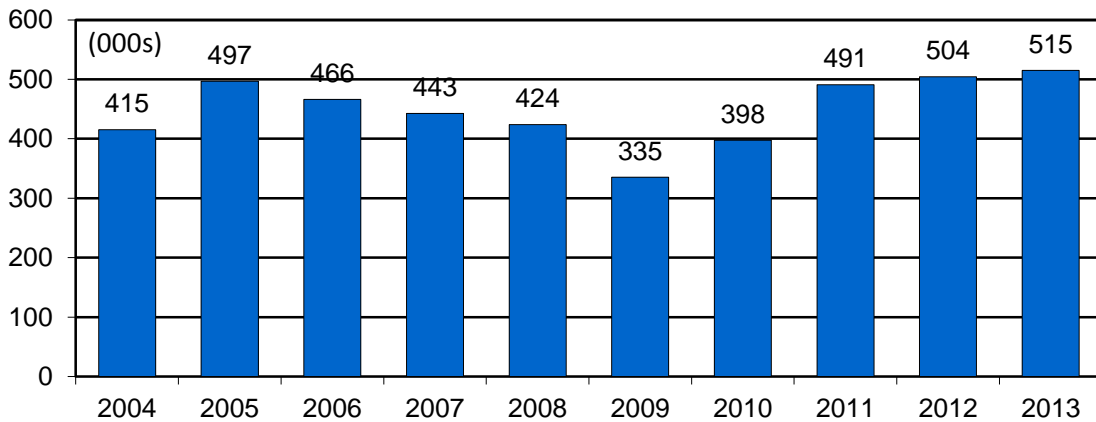
Air travelers from Mexico represent one of the largest international markets for California with approximately 515,000 visitors to the state in 2013. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$512 million in California.

Visitors from Mexico to California in 2013, who arrived in the U.S. by air, reported spending \$134 per day during a 7.4 night average stay in California or approximately \$994 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 Mexico
Arriving in the U.S. by Air¹**

Year	Total U.S. Arrivals	California Market Share	Visitors to California (est.)
2003	1,359,418	31.6%	430,000
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

**Visitors to California from Mexico Arriving in the U.S. by Air¹
(2004-2013; in thousands)**



¹ 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 the California Travel & Tourism Commission and Tourism Economics, August, 2014.

Over the last 10 years Mexican air travelers who visited California have recorded varying shifts in market share. The highest annual volume of visitors was in 2005 with 497,000 visitors to California from Mexico by air. From 2006 until 2009 the visitor volume decreased each year to a low of 335,000 visitors in 2009. In 2011 it jumped 100,000 to 491,000 and has continued to increase since then to 515,000 in 2013.

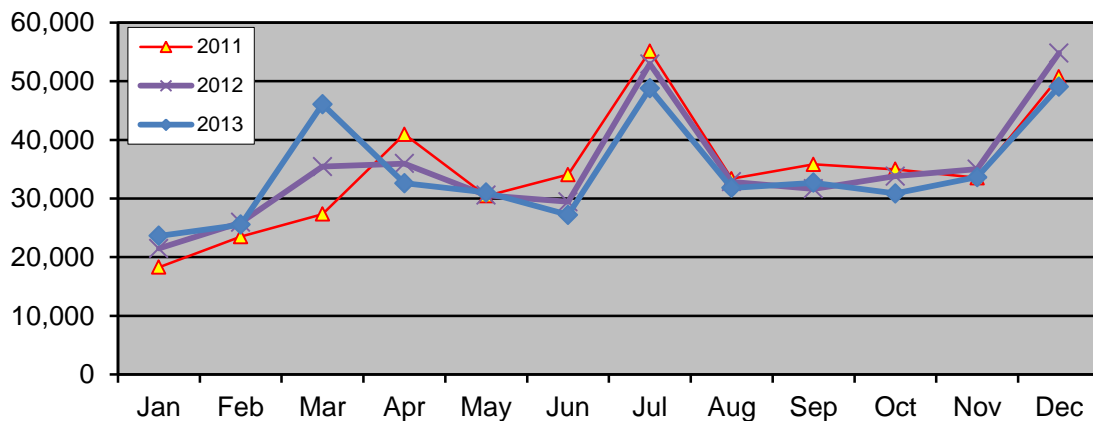
Mexican Visitors to California Arriving by Land and Air (Estimated)

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 6.96 million visitors for 2013 (6.73 million in 2012). Total Mexican visitors to California (arriving in the U.S. by air or land) in 2013 was estimated at 7.48 million visitors (7.23 million in 2012). The volume of Mexican visitors to the state increased approximately 3.4% for 2013, but was about 13% below the peak of almost 8.6 million in 2005.²

Mexican Arrivals at California Airports

Monthly volumes of port-of-entry air passenger arrivals from Mexico to California in 2013 were similar to 2012 and 2011. 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)
2011-2013¹**



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

² Source: Continuous and ongoing monthly intercept survey of visitors and monthly telephone survey of households for overnight in-home guests, CIC Research, Inc., August 2013. (Please note that residents of Mexico that cross the border on a daily basis for work are not defined as a visitor and are not included in the visitor volume estimates.)

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
- Use an online travel agency to plan and book their trip
- Have decidedly lower trip planning and advance airline booking horizons
- Choose an airline based on airfare
- Travel with family/relatives
- Stay in a private home
- Stay less time in the U.S. and CA
- Travel to fewer destinations
- Use a private or company auto for transportation while in the U.S.
- Have a lower average annual income

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

- Use a travel agency office to plan and book their trip
- Mention non-stop flights as the main factor in choosing an airline
- Purchase an inclusive travel package
- Stay in a hotel/motel
- Travel to destinations which are further from Mexico such as San Francisco, New York City and Las Vegas
- Experience many leisure activities such as sightseeing, visiting national parks/monuments, small towns/countryside, and casinos/gambling.
- Use air travel between cities, city subway/tram/bus, or 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
- Work in a management, business, science or the arts occupation.

**Characteristics of Visitors to California from Overseas Countries and Mexico
Who Arrived in the U.S. by Air (2013)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 6,744)	All Visitors to CA from Mexico (Air) (n = 121)	Leisure Visitors to CA from Mexico (Air) (n = 76)***
Primary Purpose of Trip			
Vacation/Holidays	52%	50%	66%
Visit Friends/Relatives	17%	26%	34%
Business	15%	10%	-
Convention/Conference	9%	4%	-
Other Purpose	8%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	62%	73%
Visit Friends/Relatives	32%	35%	48%
Business	20%	19%	4%
Convention/Conference	12%	9%	-
Sources Used to Plan Trip**			
Airline	43%	51%	45%
Online Travel Agency	31%	44%	49%
Travel Agency Office	26%	14%	9%
Personal Recommendation	26%	21%	24%
Travel Guide	15%	10%	8%
Corporate Travel Department	14%	9%	5%
Tour Operator/Travel Club	9%	7%	7%
National/State/City Travel Office	8%	20%	21%
Advance Planning for Trip			
7 days or less	5%	11%	6%
8 - 30 days	27%	41%	36%
31 - 60 days	17%	22%	25%
61 - 90 days	14%	9%	7%
More than 3 Months	36%	18%	27%
Total	100%	100%	100%
Average Planning Time in Days	105 days	66 days	83 days
Advance Airline Reservations			
7 days or less	10%	23%	21%
8 - 30 days	35%	44%	38%
31 - 60 days	17%	20%	22%
61 - 90 days	13%	6%	9%
91 - 120 days	8%	2%	3%
121 - 180 days	9%	3%	4%
6 Months or More	7%	3%	4%
Total	100%	100%	100%
Average Booking in Days	72 days	42 days	50 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%.

*** Caution – Small sample size

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
Who Arrived in the U.S. by Air (2013 – cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 6,744)	All Visitors to CA from Mexico (Air) (n = 121)	Leisure Visitors to CA from Mexico (Air) (n = 76)***
Means of Booking Air Trip**			
Travel Agency Office	31%	22%	23%
Airlines Directly	28%	42%	38%
Internet Booking Service	24%	40%	41%
Corporate Travel Department	15%	8%	2%
Tour Operator/Travel Club	9%	5%	3%
Other	2%	<1%	-
Main Factor in Selecting Airline			
Airfare	29%	50%	54%
Non-Stop Flights	17%	9%	11%
Convenient Schedule	15%	18%	21%
Mileage Bonus/Frequent Flyer Program	9%	6%	4%
Previous Good Experience	9%	8%	5%
Safety Reputation	6%	-	-
Loyalty to Carrier	4%	-	<1%
Employer policy	3%	1%	-
In-flight Service Reputation	3%	-	-
On-time Reputation	2%	1%	-
Other	4%	7%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	79%	84%
Executive/Business	10%	2%	-
Premium Economy	10%	13%	11%
First Class	1%	6%	5%
Total	100%	100%	100%
Use of Package			
Yes	15%	5%	6%
No	85%	95%	94%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	-	-
Attractions/Events/Entertainment	7%	5%	6%
Bus/Coach	7%	1%	-
Cruise	2%	-	-
Guided Tours	6%	2%	1%
Meals	6%	4%	5%
Recreation	1%	1%	-
Rental Car	5%	-	-
Tour Guide for Entire Trip	4%	-	-

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

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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
Who Arrived in the U.S. by Air (2013 – cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 6,744)	All Visitors from Mexico (Air) (n = 121)	Leisure Visitors to CA from Mexico (Air) (n = 76)***
Travel Companions**			
Traveling Alone	61%	57%	45%
Spouse/Partner	21%	16%	28%
Family/Relatives	13%	23%	33%
Friends	6%	5%	2%
Business Associates	4%	2%	-
Tour Group	1%	2%	2%
Average Travel Party Size	1.6	1.6	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	59%	50%
Private Home	27%	44%	55%
Other	6%	1%	<1%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	14.8 nights	12.3 nights
Mean Nights in California	12.2 nights	7.4 nights	8.2 nights
% of California Nights	54%	50%	67%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	20%	19%
Average Trips to the U.S. in Past Year	1.7 trips	2.3 trips	1.7 trips
Average Number of States Visited	2.0 states	1.4 states	1.5 states
Average Number of Destinations Visited	3.0 dest.	1.8 dest.	2.0 dest.
Places Visited in the U.S.**			
Los Angeles	59%	50%	48%
San Francisco	47%	18%	17%
Las Vegas	30%	16%	23%
New York City	16%	5%	8%
San Diego	13%	8%	12%
Anaheim-Santa Ana	8%	15%	23%
Flagstaff-Grand Canyon-Sedona	7%	-	-
San Jose	6%	8%	9%
DC Metro Area	4%	1%	1%
Monterey-Salinas	4%	4%	6%
Oahu	4%	-	-
Santa Barbara	3%	1%	2%
Riverside/San Bernardino	3%	5%	7%
Chicago	3%	2%	3%
Seattle	3%	-	-
Sacramento	3%	<1%	-
Miami	3%	-	-

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**Characteristics of Visitors to California from Overseas Countries and Mexico
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Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 6,744)	All Visitors to CA from Mexico (Air) (n = 121)	Leisure Visitors from Mexico (Air) (n = 76)***
Activities Experienced While in the U.S.**			
Shopping	88%	90%	93%
Sightseeing	84%	59%	76%
National Parks/Monuments	49%	29%	32%
Experience Fine Dining	43%	48%	54%
Small Towns/Countryside	41%	24%	28%
Amusement/Theme Parks	38%	33%	36%
Historical Locations	37%	31%	32%
Guided Tours	33%	20%	15%
Art Gallery/Museums	30%	28%	31%
Casino/Gamble	25%	9%	12%
Cultural/Ethnic Heritage Sites	21%	17%	19%
Concert/Play/Musical	20%	23%	22%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	22%	28%
Rented Auto	43%	35%	39%
Auto, Private or Company	37%	51%	56%
City Subway/Tram/Bus	33%	14%	12%
Taxicab/Limousine	33%	22%	8%
Bus between Cities	18%	19%	21%
Ferry/River Taxi/Srt. Scenic Cruise	12%	6%	3%
Railroad between Cities	8%	7%	6%
Rented Bicycle/Motorcycle/Moped	5%	3%	4%
Cruise Ship/River Boat 1+ Nights	4%	2%	-
Motor Home/Camper	2%	2%	3%
Visitor Spending****			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$1,988	\$1,507
Per Visitor Per Day (CA)	\$159	\$134	\$123
Per Visitor/Trip (California)	\$1,940	\$994	\$1,005
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	31.7%	10.0%
Air Transportation in the U.S.	6.9%	9.3%	17.2%
Entertainment	12.2%	9.8%	13.6%
Food/Beverages	17.8%	16.8%	12.2%
Gifts/Souvenirs	21.9%	23.4%	35.6%
Ground Transportation in the U.S.	5.6%	3.4%	2.9%
Other	6.3%	4.9%	8.5%

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**** Spending estimates prepared by Tourism Economics and CIC Research, Inc., (August 2014).

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

**Characteristics of Visitors to California from Overseas Countries and Mexico
Who Arrived in the U.S. by Air (2013 - cont.)**

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Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	49%	47%
Cash from Home/Travelers Checks	26%	19%	25%
Cash Adv./Withdrawal Using Credit Card	18%	16%	12%
Cash Adv./Withdrawal Using Debit Card	7%	8%	11%
Purchases Using Debit Card	6%	8%	5%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	40 years	41 years
Average Age - Females	39 years	37 years	38 years
Occupation			
Mgmt., Business, Science, & Arts	44%	34%	34%
Service Occupations	11%	14%	15%
Student	11%	16%	16%
Sales and Office	10%	10%	7%
Retired	8%	11%	13%
Homemaker	5%	3%	6%
Prod., Trans., & Material Moving	4%	3%	1%
Military/Government	4%	4%	6%
Nat. Res., Const., & Maintenance	3%	3%	2%
Other	2%	2%	-
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	42%	29%
\$20,000 - \$39,999	14%	16%	21%
\$40,000 - \$59,999	14%	8%	13%
\$60,000 - \$79,999	12%	5%	2%
\$80,000 - \$99,999	10%	4%	1%
\$100,000 - \$119,999	8%	11%	15%
\$120,000 - \$139,999	6%	2%	1%
\$140,000 - \$159,999	5%	3%	6%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	-	-
\$200,000 and over	12%	8%	13%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$65,230	\$85,609

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