

## CHARACTERISTICS OF TRAVELERS FROM SOUTH AMERICA TO CALIFORNIA – 2014

South America was one of California's large overseas markets with approximately 467,000 visitors to California in 2014. Collectively visitors from South America spent approximately \$727 million in California.

South American visitors to California during 2014 reported spending \$128 per day during a 12.2 night average stay or approximately \$1,558 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

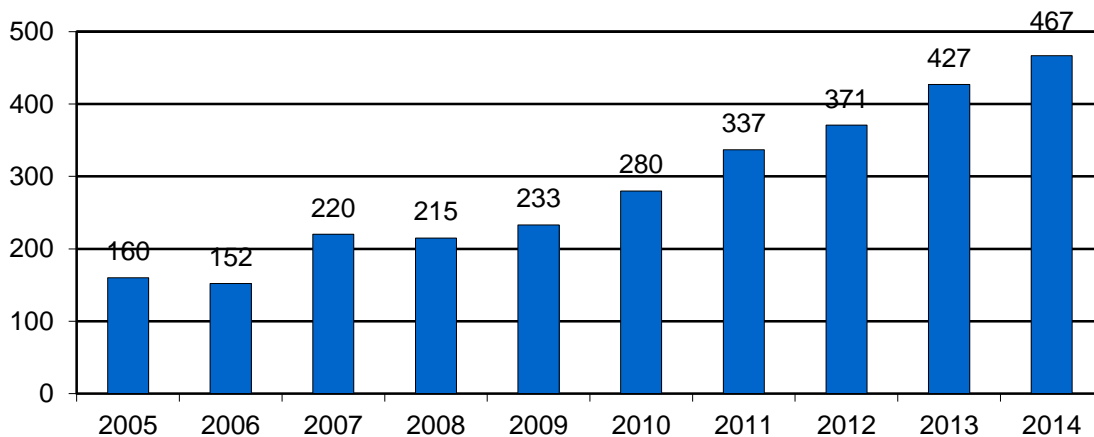
### Visitors From South America

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
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
2014	5,480,579	8.5%	467,000

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, 2005-2014 (in 000s)



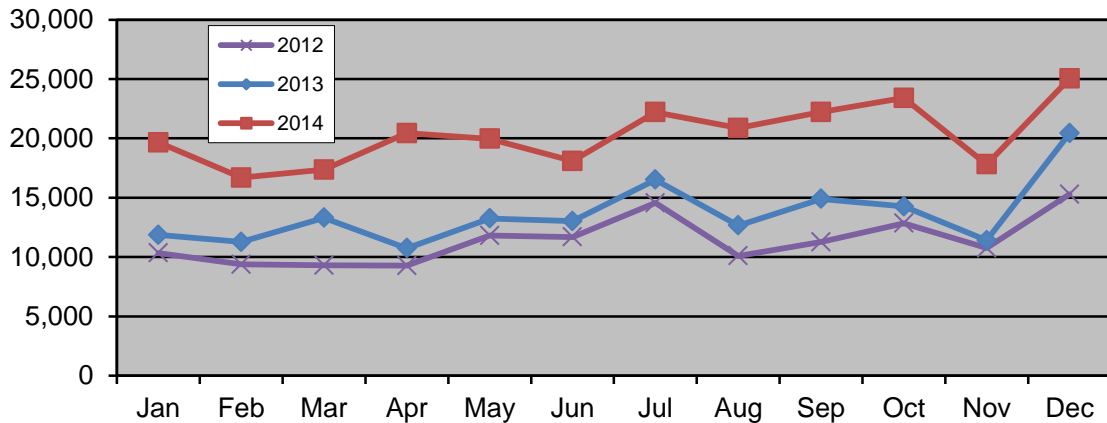
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office, Revised by Tourism Economics for Visit California (October, 2015).

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 467,000 visitors in 2014, finally surpassing the peak level of visitors to California from South America 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 higher in all months of 2014 compared with 2013 and 2012. In 2014, South American resident arrivals at California ports-of-entry peaked in October and December. The lowest volumes were recorded in February, March, June, and November.

**Residents of South America  
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 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 airlines, personal recommendations, or National/State/City travel office to plan their trip
- Book their air trip with the airlines directly
- Consider the airfare as the main factor in selecting an airline
- Visit Las Vegas while on their trip to the U.S.
- Visit amusement/theme parks and attend concerts/plays/musicals
- Use air travel between cities or a rented auto for transportation while in the U.S.
- Spend more in the U.S. per visitor
- Spend a proportion of their travel dollars on “gifts/souvenirs”
- Pay for trip expenses with cash from home/travelers checks
- Have a lower average annual income

Conversely, visitors from South America are less likely to:

- Consider a non-stop flight as a main factor in selecting an airline
- Make use of a package for their trip
- Visit San Francisco while on their trip to the U.S.
- Be on their first trip to the U.S.
- Use a city subway/tram/bus or a taxicab/limousine for transportation while in the U.S.
- Spend a proportion of their travel dollars on accommodation

## Characteristics of Travelers from South America to California – 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from South America (n = 616)	Leisure Visitors from South America (n = 396)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	58%	80%
Visit Friends/Relatives	18%	15%	20%
Business	13%	9%	-
Convention/Conference	8%	7%	-
Other Purpose	7%	12%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	66%	72%	87%
Visit Friends/Relatives	34%	33%	36%
Business	18%	12%	2%
Convention/Conference	12%	10%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	52%	50%
Online Travel Agency	32%	39%	40%
Travel Agency Office	25%	22%	19%
Personal Recommendation	29%	43%	45%
Travel Guide	15%	14%	13%
Corporate Travel Department	12%	13%	7%
Tour Operator/Travel Club	10%	12%	11%
National/State/City Travel Office	8%	24%	24%
<b>Advance Planning for Trip</b>			
7 days or less	5%	4%	2%
8 - 30 days	25%	19%	12%
31 - 60 days	19%	22%	19%
61 - 90 days	15%	20%	24%
More than 3 Months	36%	35%	43%
Total	100%	100%	100%
Average Planning Time in Days	106 days	98 days	107 days
<b>Advance Airline Reservations</b>			
7 days or less	9%	7%	4%
8 - 30 days	35%	32%	24%
31 - 60 days	19%	23%	23%
61 - 90 days	12%	17%	22%
91 - 120 days	8%	10%	13%
121 - 180 days	10%	10%	11%
6 Months or More	8%	2%	3%
Total	100%	100%	100%
Average Booking in Days	74 days	68 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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from South America (n = 616)	Leisure Visitors from South America (n = 396)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	29%	26%	25%
Airlines Directly	29%	36%	40%
Internet Booking Service	27%	27%	26%
Corporate Travel Department	12%	7%	3%
Tour Operator/Travel Club	10%	14%	16%
Other	1%	2%	2%
<b>Main Factor in Selecting Airline</b>			
Airfare	31%	49%	47%
Non-Stop Flights	19%	10%	10%
Convenient Schedule	14%	11%	10%
Mileage Bonus/Frequent Flyer Program	8%	10%	11%
Previous Good Experience	6%	6%	6%
Safety Reputation	6%	4%	5%
Loyalty to Carrier	3%	2%	2%
Employer policy	3%	1%	<1%
In-flight Service Reputation	2%	1%	2%
On-time Reputation	2%	2%	2%
Other	5%	4%	6%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	83%	88%	89%
Executive/Business	9%	3%	3%
Premium Economy	8%	9%	8%
First Class	1%	<1%	<1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	9%	8%
No	85%	92%	92%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	7%	1%	1%
Attractions/Events/Entertainment	6%	4%	3%
Bus/Coach	6%	4%	3%
Cruise	6%	1%	1%
Guided Tours	5%	1%	1%
Meals	4%	3%	2%
Recreation	2%	1%	1%
Rental Car	2%	3%	5%
Tour Guide for Entire Trip	2%	2%	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 South America to California  
(2014 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 8,032)</b>	<b>All Visitors from South America (n = 616)</b>	<b>Leisure Visitors from South America (n = 396)</b>
<b>Travel Companions**</b>			
Traveling Alone	59%	59%	47%
Spouse/Partner	22%	25%	32%
Family/Relatives	15%	14%	20%
Friends	6%	6%	6%
Business Associates	3%	1%	-
Tour Group	1%	<1%	<1%
<b>Average Travel Party Size</b>	1.7	1.6	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	77%	78%
Private Home	30%	29%	29%
Other	6%	4%	4%
<b>Length of Stay</b>			
Mean Nights in the U.S.	23.4 nights	25.6 nights	16.8 nights
Mean Nights in California	12.2 nights	12.2 nights	10.9 nights
% of California Nights	52%	48%	65%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	19%	16%
Average Trips to the U.S. in Past Year	1.7 trips	1.9 trips	1.9 trips
<b>Average Number of States Visited</b>	2.1 states	1.9 states	2.0 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.0 dest.	3.3 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	62%	67%	74%
San Francisco	44%	38%	43%
Las Vegas	29%	35%	44%
New York City	16%	11%	10%
San Diego	14%	16%	16%
Anaheim-Santa Ana	8%	10%	13%
Flagstaff-Grand Canyon-Sedona	7%	4%	5%
San Jose	6%	3%	2%
DC Metro Area	5%	2%	3%
Monterey-Salinas	4%	8%	10%
Oahu	4%	2%	1%
Santa Barbara	4%	6%	9%
Riverside/San Bernardino	3%	3%	3%
Chicago	3%	4%	4%
Seattle	3%	2%	1%
Sacramento	3%	5%	5%
Miami	3%	9%	11%

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

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from South America (n = 616)	Leisure Visitors from South America (n = 396)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	89%	92%	93%
Sightseeing	83%	84%	90%
National Parks/Monuments	52%	52%	59%
Experience Fine Dining	44%	39%	44%
Small Towns/Countryside	43%	38%	43%
Amusement/Theme Parks	40%	48%	55%
Historical Locations	35%	35%	38%
Guided Tours	33%	27%	33%
Art Gallery/Museums	31%	33%	37%
Casino/Gamble	24%	19%	23%
Cultural/Ethnic Heritage Sites	21%	18%	20%
Concert/Play/Musical	20%	30%	32%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	45%	51%	46%
Rented Auto	44%	53%	56%
Auto, Private or Company	38%	41%	40%
City Subway/Tram/Bus	31%	25%	22%
Taxicab/Limousine	31%	19%	15%
Bus between Cities	19%	17%	17%
Ferry/River Taxi/Srt. Scenic Cruise	10%	8%	8%
Railroad between Cities	7%	2%	1%
Rented Bicycle/Motorcycle/Moped	5%	5%	3%
Cruise Ship/River Boat 1+ Nights	4%	4%	5%
Motor Home/Camper	2%	1%	<1%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor Per Visitor Per Day (CA)	\$3,590 \$153	\$5,225 \$128	\$4,398 \$172
Per Visitor/Trip (California)	\$1,872	\$1,558	\$2,096
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	30.4%	21.9%	17.6%
Air Transportation in the U.S.	6.6%	5.9%	4.9%
Entertainment	12.5%	13.5%	15.4%
Food/Beverages	18.1%	15.9%	16.5%
Gifts/Souvenirs	21.1%	33.3%	36.2%
Ground Transportation in the U.S.	6.2%	5.9%	6.4%
Other	4.9%	3.6%	2.8%

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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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from South America (n = 616)	Leisure Visitors from South America (n = 396)
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	42%	43%
Cash from Home/Travelers Checks	27%	39%	41%
Cash Adv./Withdrawal Using Credit Card	18%	13%	12%
Cash Adv./Withdrawal Using Debit Card	6%	3%	2%
Purchases Using Debit Card	6%	3%	2%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	40 years	39 years	43 years
Average Age - Females	38 years	35 years	37 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	44%	45%	43%
Service Occupations	11%	13%	14%
Student	11%	12%	6%
Sales and Office	11%	12%	14%
Retired	8%	4%	6%
Homemaker	4%	3%	4%
Prod., Trans., & Material Moving	4%	1%	<1%
Military/Government	3%	3%	4%
Nat. Res., Const., & Maintenance	2%	4%	4%
Other	2%	4%	5%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	27%	26%
\$20,000 - \$39,999	13%	19%	18%
\$40,000 - \$59,999	14%	15%	14%
\$60,000 - \$79,999	11%	10%	12%
\$80,000 - \$99,999	10%	3%	4%
\$100,000 - \$119,999	9%	7%	6%
\$120,000 - \$139,999	6%	3%	4%
\$140,000 - \$159,999	4%	3%	4%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	2%	2%	2%
\$200,000 and over	11%	9%	8%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$71,838	\$76,139

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

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