

## CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2008

Air travelers from Mexico represent one of the largest international markets for California with approximately 378,000 visitors to the state in 2008. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$264 million in California.

Visitors from Mexico to California in 2008, who arrived in the U.S. by air, reported spending \$97 per day during a 7.2 night average stay in California or approximately \$698 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

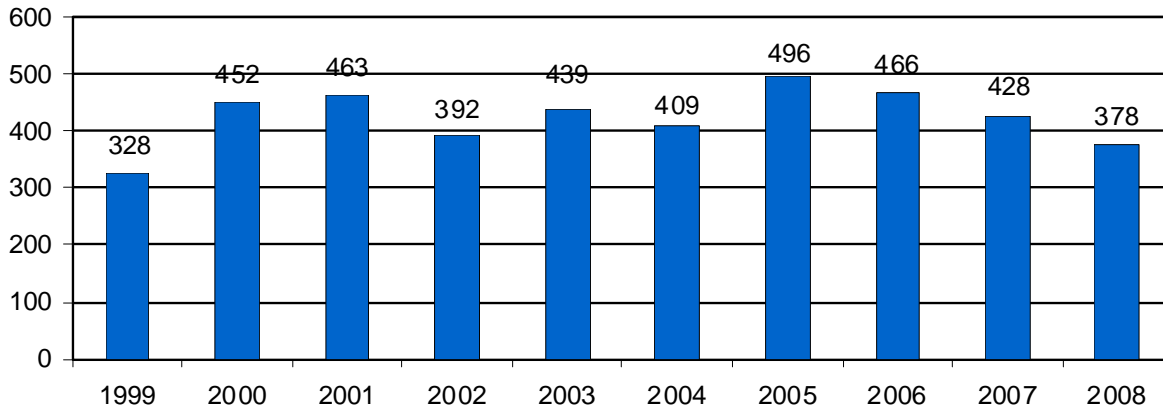
### Visitors From Mexico (Air)

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
1998	1,420,832	26.8%	381,000
1999	1,489,170	22.0%	328,000
2000	1,736,609	26.0%	452,000
2001	1,512,980	30.6%	463,000
2002	1,436,727	27.3%	392,000
2003	1,359,418	32.3%	439,000
2004	1,493,971	27.4%	409,000
2005	1,668,432	29.7%	496,000
2006	1,713,158	27.2%	466,000
2007	1,878,399	22.8%	428,000
2008	1,708,320	22.1%	378,000

1) U.S. Dept of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept of Commerce, Office of Travel & Tourism Industries, "Survey of International Air Travelers."

### Number of Visitors from Mexico (Air) to CA, 1999-2008 (in 000s)



Source: International Trade Administration, Office of Travel and Tourism Industries.

Over the last 10 years Mexican air travelers who visited California have recorded substantial shifts in market share. The highest annual volume of visitors was in 2005 with 496,000 visitors to California from Mexico by air. Since then the visitor volume has decreased each year and dropped to 378,000 visitors in 2008.

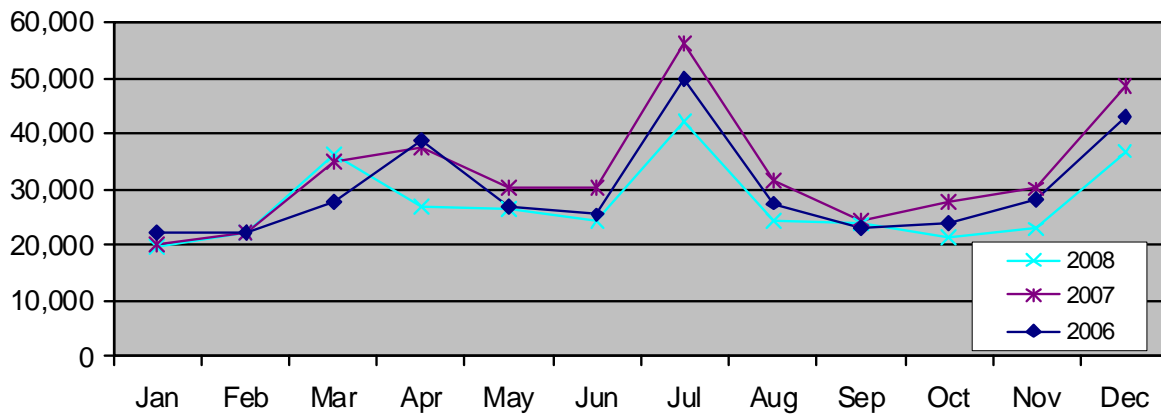
### Mexican Visitors to California Arriving by Land and Air (Estimated)

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 6.37 million visitors for 2008. Total Mexican visitors (air and land) to the state in 2008 was estimated at 6.74 million visitors. The volume of Mexican visitors to the state has declined 21.5% from a peak of almost 8.6 million in 2005.<sup>1\*</sup>

### Mexican Arrivals at California Airports

Monthly volumes of port-of-entry air passenger arrivals from Mexico to California were consistent in 2008 compared with 2006 and 2007. 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)  
2006-2008**



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

<sup>1</sup> \*Source: Continuous ongoing monthly intercept survey of visitors and monthly telephone survey of households for overnight in-home guests, CIC Research, Inc., August 2009. (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:

- Travel to California to visit friends or relatives
- Have decidedly lower trip planning and advance airline booking horizons
- Select an airline due to airfare and due to a non-stop flight
- Have a shorter length of stay in the U.S.
- Spend a lower percentage of their travel dollar per visitor per trip
- Use cash to pay for trip expenses
- Have a lower average household income

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

- Travel to California for business/professional purposes, as well as for leisure/recreation/holidays
- Use a personal computer to plan their trip
- Select an airline due to the mileage bonus/frequent flyer program
- Stay in a hotel or other paid lodging
- Be on their first trip to the U.S.
- Travel to destinations such as San Francisco, New York City and Las Vegas
- Experience many activities such as dining out, sightseeing in cities, visiting national parks, historical places, the countryside, cultural heritage sites, casinos, art galleries and museums, and going on guided tours
- Use airlines, taxis/limousines, or public transportation while in the U.S.
- Use credit cards to pay for trip expenses

**Characteristics of Visitors to California from Overseas Countries and Mexico  
Who Arrived in the U.S. by Air (2008)**

<b>Trip and Traveler Characteristics</b>	<b>All Overseas Visitors to CA* (n = 7,780)</b>	<b>All Visitors to CA from Mexico (Air) (n = 346)</b>	<b>Leisure Visitors to CA from Mexico (Air) (n = 218)</b>
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	43%	30%	47%
Visit Friends/Relatives	19	34	53
Business/Professional	27	18	-
Convention/Conference	7	6	-
Other Purpose	5	11	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	63%	50%	68%
Visit Friends/Relatives	37	46	66
Business/Professional	31	22	2
Convention/Conference	11	10	-
<b>Sources Used to Plan Trip**</b>			
Airlines Directly	21%	21%	22%
Corporate Travel Department	11	5	-
Personal Computer	42	28	32
Friends/Relatives	16	17	24
Newspapers/Magazines	3	0	0
State/City Travel Office	4	5	4
Tour Company	6	2	3
Travel Agency	43	37	29
Travel Guides	10	5	6
<b>Advance Planning for Trip</b>			
7 days or less	9%	14%	16%
8 - 30 days	30	49	45
31 - 60 days	19	16	12
61 - 90 days	13	9	10
More than 3 Months	30	12	17
Total	100%	100%	100%
Average Planning Time in Days	92	51	62
<b>Advance Airline Reservations</b>			
7 days or less	16%	24%	24%
8 - 30 days	38	57	58
31 - 60 days	17	10	8
61 - 90 days	10	4	4
91 - 120 days	5	3	2
121 - 180 days	8	2	3
6 Months or More	6	1	1
Total	100%	100%	100%
Average Booking in Days	60	28	30

\* 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: International Trade Administration, Office of Travel and Tourism Industries, "Survey of International Air Travelers."

**Characteristics of Visitors to California from Overseas Countries and Mexico  
Who Arrived in the U.S. by Air (2008 – cont.)**

<b>Trip and Traveler Characteristics</b>	<b>All Overseas Visitors to California* (n = 7,780)</b>	<b>All Visitors to CA from Mexico (Air) (n = 346)</b>	<b>Leisure Visitors to CA from Mexico (Air) (n = 218)</b>
<b>Means of Booking Air Trip</b>			
Airlines Directly	12%	17%	15%
Corporate Travel Department	11	8	-
Personal Computer	22	26	35
Travel Agent	48	47	48
Travel Club	1	0	0
Tour Operator	4	1	1
Other/Don't Know	3	2	2
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	24%	41%	39%
Schedule	15	13	11
Non-Stop Flight	13	26	28
Mileage Bonus/Frequent Flyer Program	12	5	8
Previous Good Experience	10	4	3
Safety Reputation	7	1	2
Airline Loyalty	4	0	0
In-flight Service	5	3	4
Employer policy	4	2	0
Other	6	4	4
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	77%	83%	86%
Executive/Business	20	14	12
First Class	3	3	2
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	11%	14%	12%
No	89	86	89
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	0%	-
8 - 30 days	26	78	55%
31 - 60 days	23	8	7
61 - 90 days	12	0	0
91 - 120 days	5	1	2
121 - 180 days	17	12	36
6 Months or More	14	-	-
Total	100%	100%	100%

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**Characteristics of Visitors to California from Overseas Countries and Mexico  
Who Arrived in the U.S. by Air (2008 – cont.)**

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<b>Travel Companions**</b>			
Business Associates	10%	4%	1%
Family/Relatives	23	27	41
Friends	12	9	7
Spouse	27	33	36
Tour Group	2	1	1
Traveling Alone	39	41	35
<b>Average Travel Party Size</b>	1.5	1.6	1.7
<b>Median Travel Party Size</b>	1.0	1.0	1.0
<b>Type of Lodging**</b>			
Hotel / Motel	78%	66%	51%
Private Home	28	35	49
Other	4	3	5
<b>Length of Stay</b>			
Mean Nights in the U.S.	21.2	12.2	14.6
Mean Nights in California	11.0	7.2	9.3
% of California Nights	52%	59%	64%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	24%	13%	18%
Average Trips to the U.S. in Past Year	2.0	3.2	2.5
Average Trips to the U.S. in Past 5 Years	6.3	12.6	8.8
<b>Average Number of States Visited</b>	2.0	1.4	1.5
<b>Average Number of Destinations Visited</b>	2.9	1.8	2.1
<b>Places Visited in the U.S.**</b>			
Los Angeles	53%	53%	54%
San Francisco	49	22	27
Las Vegas	28	11	18
New York City	17	4	6
San Diego	13	14	8
San Jose	7	3	4
Anaheim-Santa Ana	7	11	18
Yosemite	5	-	-
Grand Canyon	4	-	-
Chicago	4	5	5
DC Metro Area	4	0	0
Monterey-Salinas	4	1	2
Seattle	3	1	1
Sacramento	3	2	3
Riverside/San Bernardino	3	2	2
Santa Barbara	3	0	0

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<b>Activities Experienced While in the U.S.**</b>			
Dining Out	87%	71%	60%
Shopping	85	79	84
Sightseeing in Cities	53	28	35
Historical Places	44	35	41
Visiting Small Towns	36	32	40
National Parks	35	15	16
Amusement/Theme Parks	34	40	61
Touring Countryside	30	15	17
Cultural Heritage Sites	28	13	16
Casinos/Gambling	24	7	10
Art Gallery/Museum	23	12	16
Guided Tours	22	11	14
<b>Transportation While in the U.S.**</b>			
Taxi/Limousine	42%	26%	14%
Rented Auto	40	38	43
Airlines in U.S.	36	28	34
Company or Private Auto	28	32	40
City Subway/Tram/Bus	26	15	15
Railroad between Cities	11	11	9
Bus between Cities	9	10	9
Motor Home/Camper	2	-	-
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,998	\$1,901	\$1,907
Per Visitor/Trip (U.S.)	2,607	1,186	1,103
Per Visitor Per Day	123	97	76
Per Visitor/Trip (California)	\$1,353	\$698	\$707
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$800	\$268	\$204
Food/Beverages	526	230	219
Gifts/Souvenirs	450	350	341
Transportation in the U.S.	425	159	110
Entertainment	234	115	148
Expenses at the Airport	37	27	28
Other	135	37	52
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,607</b>	<b>\$1,186</b>	<b>\$1,103</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	54%	42%	36%
Cash	39	50	56
Debit Cards	5	8	6
Travelers Checks	3	1	2
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	43.3	41.7	39.9
Average Age - Females	39.6	39.8	41.6
<b>Occupation</b>			
Manager/Executive	37%	34%	21%
Professional/Technical	34	36	41
Student	7	9	8
Clerical/Sales	7	3	5
Retired	6	4	5
Other	10	15	21
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	8%	24%	37%
\$20,000 - \$39,999	11	9	10
\$40,000 - \$59,999	13	12	11
\$60,000 - \$79,999	13	14	10
\$80,000 - \$99,999	12	16	14
\$100,000 - \$119,999	10	6	4
\$120,000 - \$139,999	7	6	6
\$140,000 - \$159,999	5	5	3
\$160,000 - \$179,999	3	1	-
\$180,000 - \$199,999	3	4	4
\$200,000 and over	16	3	3
Total	100%	100%	100%
Average Annual Income	\$101,300	\$73,300	\$60,100

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