

CHARACTERISTICS OF TRAVELERS FROM MEXICO (Air) TO CALIFORNIA - 2007

Air travelers from Mexico represents one of the largest international markets for California with approximately 428,000 visitors to the state in 2007. Collectively visitors from Mexico arriving in the U.S. by air spent approximately \$389 million in California.

Mexican visitors to California by air during 2007 reported spending \$115 per day during a 7.9 night average stay or approximately \$909 per visitor. The average spending for all overseas visitors to California was about \$1,166 (\$111 per day; 10.5 nights in California).

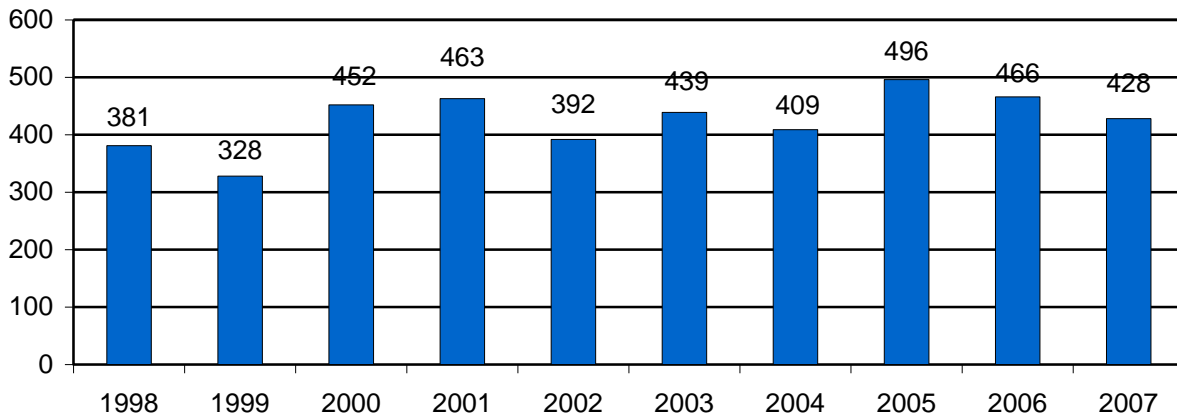
Visitors From Mexico (Air)

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1997	1,303,786	23.3%	304,000
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

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, 1998-2007 (in 000s)



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

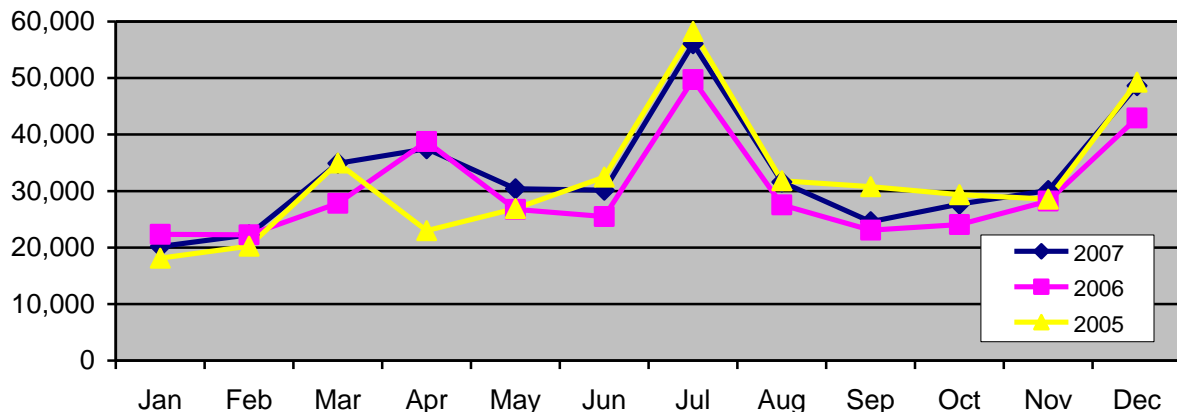
Over the last 10 years Mexican air travelers who visited California have recorded substantial shifts in market share. As a result, the volume of Mexican air visitors to California has experienced variability and no discernable growth trend.

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 Mexican land visitors to California was estimated at 6.95 million visitors. Total Mexican visitors (air and land) to the state in 2007 was estimated at 7.4 million visitors. The volume of Mexican visitors to the state has declined 14% over the last two years.*

Mexican Arrivals at California Airports

Monthly volumes of port-of-entry air passenger arrivals from Mexico to California were consistent in 2007 compared with 2005 and 2006. 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)
2005-2007**



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

*Source: CIC Research, Inc. August 2008.

Comparisons with Overseas Visitors

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
- Plan their trip with information from friends or relatives
- Have decidedly lower trip planning and advance airline booking horizons
- Book their flight using a personal computer
- Select an airline due to airfare and due to a non-stop flight
- Stay in a private home
- Have a shorter length of stay in the U.S.
- Visit amusement or theme parks
- Spend a lower percentage of their travel dollar on lodging
- Spend a higher percentage of their travel dollar on gifts/souvenirs
- 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
- Use a travel agent 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 out-of-state destinations such as New York City and Las Vegas
- Travel to Northern California destinations such as San Francisco
- Experience many activities such as dining out, sightseeing in cities, visiting national parks, the countryside, cultural heritage sites, casinos, art galleries and museums, and going on guided tours
- Use airlines, taxis/limousines, or city subway/tram/bus for transportation while in the U.S.
- Use credit cards to pay for trip expenses

Characteristics of Travelers from Mexico by Air to California – 2007

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Mexico (Air) (n = 226)	Leisure Visitors from Mexico (Air) (n = 139)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	37%	33%	47%
Visit Friends/Relatives	20	38	53
Business/Professional	31	15	-
Convention/Conference	8	9	-
Other Purpose	4	4	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	55%	52%	69%
Visit Friends/Relatives	38	52	69
Business/Professional	35	20	2
Convention/Conference	13	13	-
Sources Used to Plan Trip**			
Airlines Directly	19%	18%	16%
Corporate Travel Department	12	6	-
Personal Computer	36	34	38
Friends/Relatives	15	27	36
Newspapers/Magazines	3	0	0
State/City Travel Office	3	4	3
Tour Company	5	2	1
Travel Agency	48	38	34
Travel Guides	9	2	-
Advance Planning for Trip			
7 days or less	9%	20%	24%
8 - 30 days	36	39	38
31 - 60 days	20	20	16
61 - 90 days	11	12	14
More than 3 Months	25	6	8
Total	100%	100%	100%
Average Planning Time in Days	81	48	49
Advance Airline Reservations			
7 days or less	16%	31%	33%
8 - 30 days	43	51	49
31 - 60 days	16	8	7
61 - 90 days	8	5	6
91 - 120 days	6	3	1
121 - 180 days	6	3	4
6 Months or More	5	0	0
Total	100%	100%	100%
Average Booking in Days	55	29	28

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

** Multiple response question. Table may add to more than 100%.

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Mexico by Air to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Mexico (Air) (n = 226)	Leisure Visitors from Mexico (Air) (n = 139)
Means of Booking Air Trip			
Airlines Directly	10%	14%	16%
Corporate Travel Department	12	6	-
Personal Computer	18	31	38
Travel Agent	54	46	43
Travel Club	-	0	0
Tour Operator	4	1	-
Other/Don't Know	2	3	4
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	38%	46%
Schedule	16	17	14
Non-Stop Flight	12	26	27
Mileage Bonus/Frequent Flyer Program	11	1	1
Previous Good Experience	9	6	3
Safety Reputation	7	1	1
Airline Loyalty	5	0	-
In-flight Service	5	3	5
Employer policy	4	3	0
Other	6	5	3
Airline Seating Area			
Economy/Tourist/Coach	78%	86%	91%
Executive/Business	19	10	6
First Class	4	4	4
Total	100%	100%	100%
Use of Package			
Yes	13%	5%	4%
No	87	95	96
Total	100%	100%	100%
Advance Package Booking			
7 days or less	5%	2%	0%
8 - 30 days	32	32	12
31 - 60 days	18	29	13
61 - 90 days	11	-	-
91 - 120 days	11	3	6
121 - 180 days	8	34	69
6 Months or More	15	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from Mexico by Air to California
(2007 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Mexico (Air) (n = 226)	Leisure Visitors from Mexico (Air) (n = 139)
Travel Companions**			
Business Associates	12%	5%	-
Family/Relatives	23	31	41%
Friends	9	10	8
Spouse	25	28	32
Tour Group	2	2	2
Traveling Alone	41	41	39
Average Travel Party Size	1.5	1.6	1.7
Type of Lodging**			
Hotel / Motel	78%	56%	50%
Private Home	29	43	47
Other	3	5	6
Length of Stay			
Mean Nights in the U.S.	19.2	13.3	14.2
Mean Nights in California	10.5	7.9	9.0
% of California Nights	55%	59%	63%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	21%	9%	8%
Average Trips to the U.S. in Past Year	2.0	3.4	2.8
Average Trips to the U.S. in Past 5 Years	6.6	13.3	10.4
Average Number of States Visited	2.0	1.3	1.2
Average Number of Destinations Visited	2.7	1.8	1.8
Places Visited in the U.S.**			
Los Angeles	51%	47%	46%
San Francisco	44	26	29
Las Vegas	23	6	8
New York City	15	1	1
San Diego	12	9	8
San Jose	8	4	4
Anaheim	8	11	16
Grand Canyon	4	-	-
Chicago	4	3	0
Yosemite	3	-	-
DC Metro Area	3	0	0
Seattle	3	1	1
Monterey	3	1	2
Sacramento	3	2	3
Riverside/San Bernardino	2	1	1
Oahu/Honolulu	2	1	1
Miami	2	-	-
Oakland	2	4	5

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Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,200)	All Visitors from Mexico (Air) (n = 226)	Leisure Visitors from Mexico (Air) (n = 139)
Activities Experienced While in the U.S.**			
Shopping	86%	88%	90%
Dining Out	86	65	56
Sightseeing in Cities	51	27	26
Historical Places	37	35	36
Amusement/Theme Parks	33	46	61
Visiting Small Towns	31	39	50
National Parks	30	16	19
Touring Countryside	27	14	11
Cultural Heritage Sites	24	13	11
Casinos/Gambling	23	8	11
Art Gallery/Museum	21	11	10
Guided Tours	21	9	10
Transportation While in the U.S.**			
Taxi/Limousine	41%	27%	15%
Airlines in U.S.	38	17	17
Rented Auto	36	34	40
Company or Private Auto	31	38	45
City Subway/Tram/Bus	21	9	6
Railroad between Cities	10	7	3
Bus between Cities	9	13	15
Motor Home/Camper	2	-	-
Spending by Category (Per Visitor/Trip)			
Lodging	\$657	\$333	\$212
Food/Beverages	399	276	235
Gifts/Souvenirs	364	431	382
Transportation in the U.S.	336	236	119
Entertainment	194	165	170
Expenses at the Airport	37	34	33
Other	148	58	77
Total Spending Per Visitor/Trip	\$2,135	\$1,534	\$1,227
Visitor Spending in the U.S.			
Per Travel Party Per Trip	\$3,235	\$2,443	\$2,028
Per Visitor/Trip	2,135	1,534	1,227
Per Person Per Day	111	115	86

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**Characteristics of Travelers from Mexico by Air to California
(2007 - cont.)**

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Payment Method for Trip Expenses			
Credit Cards	54%	39%	31%
Cash	39	51	58
Debit Cards	5	9	10
Travelers Checks	3	2	2
Total	100%	100%	100%
Age			
Average Age - Males	43.3	39.2	38.6
Average Age - Females	39.6	38.5	39.1
Occupation			
Manager/Executive	37%	36%	27%
Professional/Technical	34	32	34
Student	7	5	4
Clerical/Sales	7	5	7
Retired	6	3	3
Other	10	20	25
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	27%	37%
\$20,000 - \$39,999	11	12	12
\$40,000 - \$59,999	13	12	10
\$60,000 - \$79,999	13	14	9
\$80,000 - \$99,999	12	9	13
\$100,000 - \$119,999	10	9	6
\$120,000 - \$139,999	7	5	7
\$140,000 - \$159,999	5	3	1
\$160,000 - \$179,999	3	1	-
\$180,000 - \$199,999	3	3	2
\$200,000 and over	16	5	3
Total	100%	100%	100%
Average Annual Income	\$101,300	\$69,000	\$57,700

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