

CHARACTERISTICS OF TRAVELERS FROM BRAZIL TO CALIFORNIA - 2013

Brazil was one of California's large overseas markets with approximately 206,000 visitors to the state in 2013. Collectively visitors from Brazil spent approximately \$435 million in California.

Brazilian visitors to California during 2013 reported spending \$140 per day during an 15.0 night average stay or approximately \$2,106 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

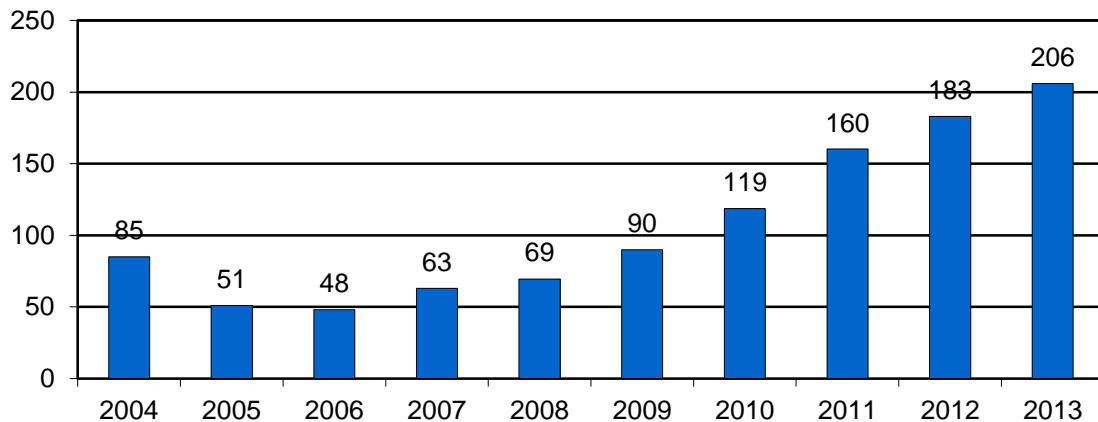
Visitors from Brazil

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	348,945	21.5%	75,000
2004	384,734	22.1%	85,000
2005	485,373	10.5%	51,000
2006	525,271	9.1%	48,000
2007	636,431	9.9%	63,000
2008	769,232	9.0%	69,000
2009	892,611	10.1%	90,000
2010	1,197,866	9.9%	119,000
2011	1,508,279	10.6%	160,000
2012	1,791,103	10.2%	183,000
2013	2,060,291	10.0%	206,000

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 Brazil to CA, 2004-2013 (in 000s)



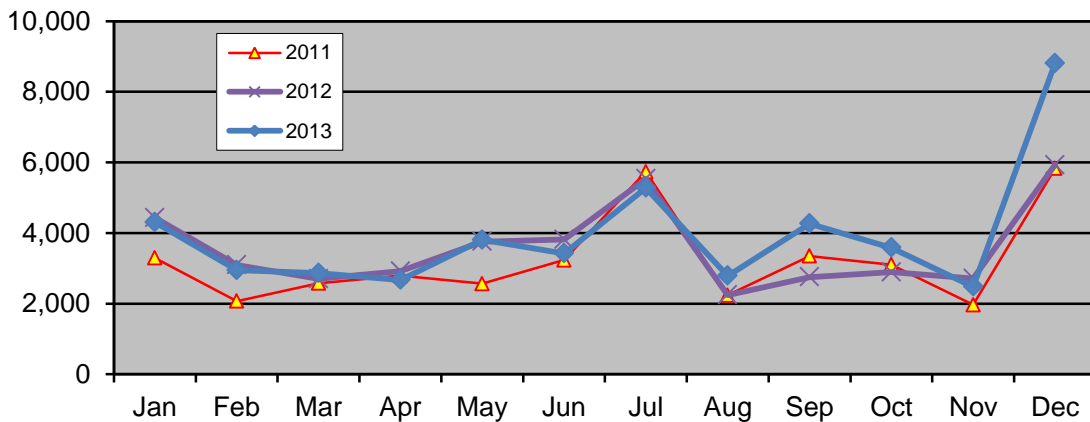
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

From 1997 to 2006 visitor volume to California from Brazil dropped from 178,000 to a low of 48,000. Since then it has shown a steady increase and the number of visitors to California from Brazil is up to a high of 206,000 in 2013. Brazil is a large market, but it is subject to big swings in its economy and the total volume of Brazilians visiting the U.S. Almost one million residents of Brazil visited the U.S. in 1997, but by 2003 total U.S. arrivals had dropped 63% to about 350,000. In 2013 it had risen up to almost 2.1 million.

Brazilian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Brazil to California were higher or almost the same during most months of 2013 than in previous years. In general, Brazilian resident arrivals at California ports-of-entry tended to peak in July and December. For 2013, the lowest volume was recorded in August and November, and the highest for December. Compared with 2011 and 2012, December 2013 showed a large increase in Brazilian resident arrivals at California ports-of-entry.

**Residents of Brazil
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 Brazil 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 Brazil are more likely to:

- Travel to the U.S. for the purpose of a vacation/holiday
- Plan their trip with information from airlines, personal recommendations, travel guides, and government travel offices
- Select an airline due to airfare
- Travel with a spouse/partner
- Visit Las Vegas as part of their trip
- Visit amusement/theme parks, art galleries/museums, and concerts/plays/musicals
- Use a rented auto or airlines for transportation in the U.S.

Conversely, visitors from Brazil are less likely to:

- Be traveling to the U.S for business/professional reasons
- Experience fine dining.

Characteristics of Travelers from Brazil to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Brazil (n = 179)	Leisure Visitors from Brazil (n = 111)
Primary Purpose of Trip			
Vacation/Holidays	52%	65%	84%
Visit Friends/Relatives	17%	13%	16%
Business	15%	4%	-
Convention/Conference	9%	7%	-
Other Purpose	8%	11%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	79%	89%
Visit Friends/Relatives	32%	26%	30%
Business	20%	7%	1%
Convention/Conference	12%	9%	1%
Sources Used to Plan Trip**			
Airline	43%	50%	48%
Online Travel Agency	31%	32%	34%
Travel Agency Office	26%	27%	24%
Personal Recommendation	26%	50%	55%
Travel Guide	15%	25%	24%
Corporate Travel Department	14%	19%	11%
Tour Operator/Travel Club	9%	10%	9%
National/State/City Travel Office	8%	23%	20%
Advance Planning for Trip			
7 days or less	5%	1%	-
8 - 30 days	27%	16%	14%
31 - 60 days	17%	16%	15%
61 - 90 days	14%	26%	30%
More than 3 Months	36%	41%	41%
Total	100%	100%	100%
Average Planning Time in Days	105 days	117 days	122 days
Advance Airline Reservations			
7 days or less	10%	6%	6%
8 - 30 days	35%	21%	15%
31 - 60 days	17%	26%	26%
61 - 90 days	13%	23%	25%
91 - 120 days	8%	11%	13%
121 - 180 days	9%	11%	14%
6 Months or More	7%	2%	2%
Total	100%	100%	100%
Average Booking in Days	72 days	77 days	83 days

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

** Multiple response question. The column may sum to more than 100%.

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

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Brazil (n = 179)	Leisure Visitors from Brazil (n = 111)
Means of Booking Air Trip**			
Travel Agency Office	31%	31%	26%
Airlines Directly	28%	33%	35%
Internet Booking Service	24%	32%	22%
Corporate Travel Department	15%	11%	4%
Tour Operator/Travel Club	9%	12%	9%
Other	2%	2%	<1%
Main Factor in Selecting Airline			
Airfare	29%	39%	37%
Non-Stop Flights	17%	11%	8%
Convenient Schedule	15%	23%	28%
Mileage Bonus/Frequent Flyer Program	9%	15%	17%
Previous Good Experience	9%	2%	2%
Safety Reputation	6%	2%	2%
Loyalty to Carrier	4%	1%	1%
Employer policy	3%	<1%	<1%
In-flight Service Reputation	3%	2%	3%
On-time Reputation	2%	1%	<1%
Other	4%	4%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	85%	85%
Executive/Business	10%	4%	4%
Premium Economy	10%	11%	11%
First Class	1%	1%	<1%
Total	100%	100%	100%
Use of Package			
Yes	15%	10%	9%
No	85%	90%	91%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	<1%	-
Bus/Coach	7%	1%	1%
Guided Tours	6%	-	-
Meals	6%	3%	-
Rental Car	5%	5%	7%
Tour Guide for Entire Trip	4%	-	-
Airfare and Accommodation Only	3%	2%	2%
Cruise	2%	-	-
Recreation	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 Brazil to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Brazil (n = 179)	Leisure Visitors from Brazil (n =111)
Travel Companions**			
Traveling Alone	61%	60%	37%
Spouse/Partner	21%	32%	52%
Family/Relatives	13%	17%	28%
Friends	6%	1%	1%
Business Associates	4%	<1%	-
Tour Group	1%	-	-
Average Travel Party Size	1.6	1.7	2.1
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	81%	82%
Private Home	27%	25%	24%
Other	6%	2%	<1%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	25.3 nights	15.7 nights
Mean Nights in California	12.2 nights	15.0 nights	9.3 nights
% of California Nights	54%	59%	59%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	23%	19%
Average Trips to the U.S. in Past Year	1.7 trips	1.8 trips	1.7 trips
Average Number of States Visited	2.0 states	2.0 states	2.1 states
Average Number of Destinations Visited	3.0 dest.	3.2 dest.	3.5 dest.
Places Visited in the U.S.**			
Los Angeles	59%	68%	74%
San Francisco	47%	54%	61%
Las Vegas	30%	41%	50%
New York City	16%	22%	19%
San Diego	13%	19%	15%
Anaheim-Santa Ana	8%	9%	7%
Flagstaff-Grand Canyon-Sedona	7%	9%	11%
San Jose	6%	3%	1%
DC Metro Area	4%	1%	<1%
Monterey-Salinas	4%	8%	11%
Oahu	4%	2%	3%
Santa Barbara	3%	8%	11%
Riverside/San Bernardino	3%	5%	6%
Chicago	3%	4%	1%
Seattle	3%	<1%	<1%
Sacramento	3%	3%	1%
Miami	3%	5%	4%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Brazil (n = 179)	Leisure Visitors from Brazil (n = 111)
Activities Experienced While in the U.S.**			
Shopping	88%	92%	93%
Sightseeing	84%	89%	93%
National Parks/Monuments	49%	51%	55%
Experience Fine Dining	43%	31%	36%
Small Towns/Countryside	41%	34%	36%
Amusement/Theme Parks	38%	53%	54%
Historical Locations	37%	41%	42%
Guided Tours	33%	27%	26%
Art Gallery/Museums	30%	40%	41%
Casino/Gamble	25%	31%	34%
Cultural/Ethnic Heritage Sites	21%	18%	17%
Concert/Play/Musical	20%	39%	48%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	63%	62%
Rented Auto	43%	61%	70%
Auto, Private or Company	37%	41%	37%
City Subway/Tram/Bus	33%	39%	31%
Taxicab/Limousine	33%	35%	32%
Bus between Cities	18%	13%	14%
Ferry/River Taxi/Srt. Scenic Cruise	12%	9%	8%
Railroad between Cities	8%	2%	1%
Rented Bicycle/Motorcycle/Moped	5%	12%	15%
Cruise Ship/River Boat 1+ Nights	4%	1%	1%
Motor Home/Camper	2%	1%	--%
Visitor Spending in the U.S.			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$3,553	\$3,707
Per Visitor Per Day (CA)	\$159	\$140	\$236
Per Visitor/Trip (California)	\$1,940	\$2,106	\$2,196
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	27.9%	28.0%
Air Transportation in the U.S.	6.9%	3.6%	2.6%
Entertainment	12.2%	13.4%	14.9%
Food/Beverages	17.8%	12.9%	13.0%
Gifts/Souvenirs	21.9%	27.8%	29.7%
Ground Transportation in the U.S.	5.6%	7.5%	7.0%
Other	6.3%	6.9%	4.8%

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** Multiple response question. The column may sum 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 Brazil to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Brazil (n = 179)	Leisure Visitors from Brazil (n = 111)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	44%	48%
Cash from Home/Travelers Checks	26%	23%	25%
Cash Adv./Withdrawal Using Credit Card	18%	10%	10%
Cash Adv./Withdrawal Using Debit Card	7%	8%	7%
Purchases Using Debit Card	6%	15%	11%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	37 years	38 years
Average Age - Females	39 years	34 years	36 years
Occupation			
Mgmt., Business, Science, & Arts	44%	47%	47%
Service Occupations	11%	14%	16%
Student	11%	11%	6%
Sales and Office	10%	9%	7%
Retired	8%	<1%	<1%
Homemaker	5%	7%	9%
Prod., Trans., & Material Moving	4%	3%	3%
Military/Government	4%	8%	11%
Nat. Res., Const., & Maintenance	3%	1%	1%
Other	2%	1%	-
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	25%	25%
\$20,000 - \$39,999	14%	9%	9%
\$40,000 - \$59,999	14%	21%	16%
\$60,000 - \$79,999	12%	6%	9%
\$80,000 - \$99,999	10%	1%	1%
\$100,000 - \$119,999	8%	5%	6%
\$120,000 - \$139,999	6%	4%	5%
\$140,000 - \$159,999	5%	11%	12%
\$160,000 - \$179,999	3%	3%	4%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	12%	15%	14%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$110,525	\$110,569

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