

CHARACTERISTICS OF TRAVELERS FROM BRAZIL TO CALIFORNIA - 2015

Brazil was one of California's large overseas markets with approximately 225,000 visitors to the state in 2015. Collectively visitors from Brazil spent approximately \$453 million in California.

Brazilian visitors to California during 2015 reported spending \$134 per day during a 15.1 night average stay or approximately \$2,017 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors from Brazil

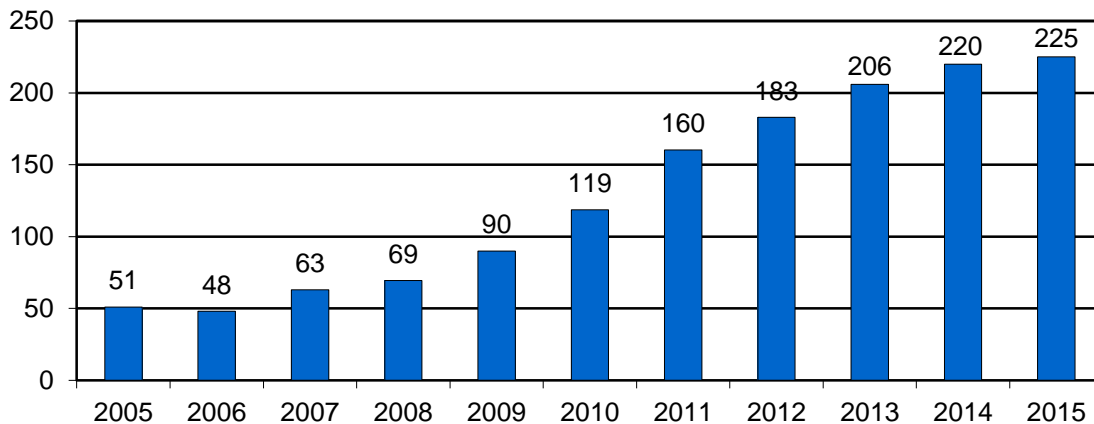
Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	485,373	10.5%	51,000
2006	525,271	9.1%	48,000
2007	636,431	9.9%	63,000
2008	769,232	9.0%	69,000
2009	892,611	10.1%	90,000
2010	1,197,866	9.9%	119,000
2011	1,508,279	10.6%	160,000
2012	1,791,103	10.2%	183,000
2013	2,060,291	10.0%	206,000
2014 ³	2,263,865	9.7%	220,000
2015 ³	2,344,020	9.6%	225,000

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

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

Number of Visitors from Brazil to CA, 2005-2015 (in 000s)



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

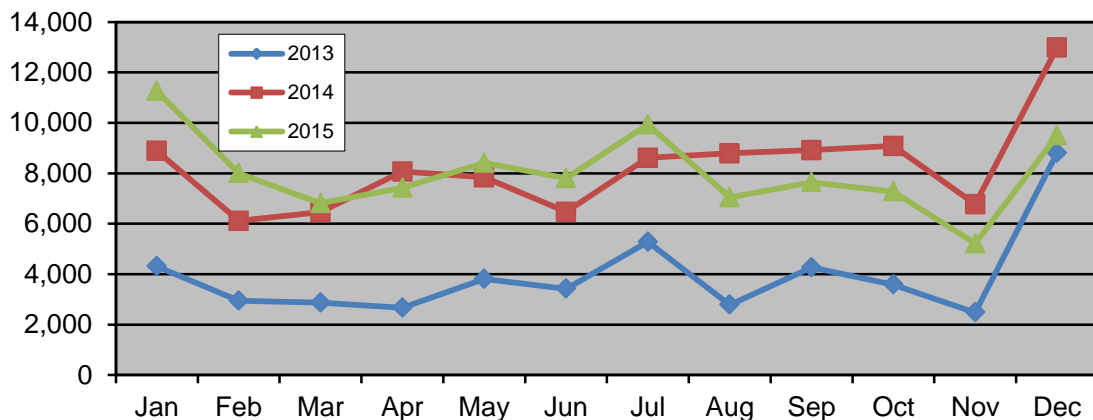
Revised by Tourism Economics for Visit California (October, 2015).

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 225,000 in 2015. 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 2014 it peaked at almost 2.3 million, but declined to 2.2 million in 2015.

Brazilian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Brazil to California during all months of 2015 were close to previous years. In general, Brazilian resident arrivals at California ports-of-entry peaked in July and December. For 2015, the lowest volume was recorded in November.

**Residents of Brazil
Monthly Port of Entry Arrivals to CA
2013-2015**



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 Brazil are provided in the table on the following page. 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 California for vacation/holiday purposes
- Plan their trip with information from personal recommendations, an online travel agency, and travel guides
- Select an airline due to airfare
- Fly in economy/tourist/coach class seating
- Stay in a hotel / motel in the U.S.
- Visit Las Vegas, Monterey-Salinas, Miami, or Santa Barbara as part of their trip
- Visit amusement/theme parks
- Use a rented auto for transportation in the U.S.
- Spend a higher percentage of their travel dollar on gifts and souvenirs in the U.S.
- Pay for their trip expenses with cash from home/travelers checks
- Be younger on average than all overseas visitors to CA
- Have a lower annual household income

Conversely, visitors from Brazil are less likely to:

- Travel to California to visit friends/relatives
- Select an airline due to non-stop flights
- Stay in a private home in the U.S.
- Experience fine dining.
- To spend money on accommodation in the U.S.

Characteristics of Travelers from Brazil to California, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Brazil (n = 256)	Leisure Visitors from Brazil (n = 159)
Primary Purpose of Trip			
Vacation/Holidays	54%	64%	89%
Visit Friends/Relatives	18%	8%	11%
Business	13%	6%	-
Convention/Conference	9%	12%	-
Other Purpose	6%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	79%	95%
Visit Friends/Relatives	34%	21%	18%
Business	17%	9%	-
Convention/Conference	12%	15%	2%
Sources Used to Plan Trip**			
Airline	43%	50%	51%
Online Travel Agency	34%	42%	41%
Personal Recommendation	29%	44%	53%
Travel Agency Office	23%	21%	14%
Travel Guide	15%	26%	33%
Corporate Travel Department	12%	19%	9%
Tour Operator/Travel Club	9%	3%	4%
National/State/City Travel Office	7%	12%	13%
Advance Planning for Trip			
7 days or less	5%	5%	4%
8 - 30 days	24%	14%	11%
31 - 60 days	19%	19%	17%
61 - 90 days	15%	17%	20%
More than 3 Months	38%	45%	48%
Total	100%	100%	100%
Average Planning Time in Days	108 days	110 days	113 days
Advance Airline Reservations			
7 days or less	8%	5%	3%
8 - 30 days	33%	23%	17%
31 - 60 days	20%	23%	26%
61 - 90 days	13%	19%	16%
91 - 120 days	9%	18%	23%
121 - 180 days	10%	10%	12%
6 Months or More	8%	2%	3%
Total	100%	100%	100%
Average Booking in Days	76 days	77 days	87 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Brazil (n = 256)	Leisure Visitors from Brazil (n = 159)
Means of Booking Air Trip**			
Airlines Directly	31%	38%	43%
Internet Booking Service	29%	34%	37%
Travel Agency Office	26%	25%	20%
Corporate Travel Department	12%	12%	7%
Tour Operator/Travel Club	9%	8%	10%
Other	1%	2%	1%
Main Factor in Selecting Airline			
Airfare	29%	61%	61%
Non-Stop Flights	17%	7%	8%
Convenient Schedule	15%	12%	8%
Previous Good Experience	9%	2%	2%
Mileage Bonus/Frequent Flyer Program	8%	12%	16%
Safety Reputation	9%	-	-
Loyalty to Carrier	3%	1%	1%
In-flight Service Reputation	3%	-	-
Employer policy	3%	2%	2%
On-time Reputation	2%	3%	2%
Other	3%	1%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	92%	94%
Premium Economy	10%	4%	4%
Executive/Business	8%	4%	3%
First Class	1%	1%	-
Total	100%	100%	100%
Use of Package			
Yes	14%	7%	8%
No	86%	93%	92%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	1%	6%
Meals	6%	2%	3%
Bus/Coach	6%	3%	4%
Guided Tours	6%	1%	1%
Rental Car	4%	3%	5%
Tour Guide for Entire Trip	5%	<1%	1%
Airfare and Accommodation Only	3%	1%	<1%
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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Brazil (n = 256)	Leisure Visitors from Brazil (n = 159)
Travel Companions**			
Traveling Alone	59%	52%	35%
Spouse/Partner	22%	27%	43%
Family/Relatives	15%	14%	20%
Friends	6%	7%	12%
Business Associates	4%	5%	<1%
Tour Group	1%	<1%	1%
Average Travel Party Size	1.7	1.8	2.1
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	73%	84%	90%
Private Home	32%	20%	15%
Other	6%	6%	4%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	22.6 nights	16.5 nights
Mean Nights in California	12.6 nights	15.1 nights	11.0 nights
% of California Nights	52%	67%	67%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	21%	19%
Average Trips to the U.S. in Past Year	1.7 trips	1.9 trips	1.8 trips
Average Number of States Visited	2.0 states	1.9 states	1.9 states
Average Number of Destinations Visited	3.1 dest.	3.4 dest.	3.8 dest.
Places Visited in the U.S.**			
Los Angeles	60%	67%	80%
San Francisco	45%	49%	60%
Las Vegas	30%	44%	53%
New York City	15%	9%	9%
San Diego	14%	21%	20%
Anaheim-Santa Ana	8%	6%	6%
Flagstaff-Grand Canyon-Sedona	7%	4%	6%
San Jose	6%	6%	3%
DC Metro Area	5%	1%	1%
Monterey-Salinas	5%	15%	24%
Santa Barbara	4%	13%	18%
Riverside/San Bernardino	4%	4%	4%
Oahu	3%	1%	1%
Seattle	3%	1%	1%
Chicago	3%	1%	-
Miami	2%	13%	11%
Sacramento	2%	1%	1%

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**Characteristics of Travelers from Brazil to California
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Brazil (n = 256)	Leisure Visitors from Brazil (n = 159)
Activities Experienced While in the U.S.**			
Shopping	87%	94%	93%
Sightseeing	83%	81%	85%
National Parks/Monuments	51%	57%	67%
Small Towns/Countryside	42%	40%	42%
Experience Fine Dining	40%	28%	35%
Amusement/Theme Parks	39%	56%	64%
Historical Locations	34%	37%	38%
Guided Tours	31%	24%	22%
Art Gallery/Museums	33%	31%	32%
Casino/Gamble	24%	32%	27%
Cultural/Ethnic Heritage Sites	20%	12%	11%
Concert/Play/Musical	20%	24%	28%
Transportation While in the U.S.**			
Rented Auto	44%	67%	75%
Air Travel between U.S. Cities	44%	45%	43%
Auto, Private or Company	37%	32%	29%
City Subway/Tram/Bus	31%	21%	17%
Taxicab/Limousine	31%	25%	21%
Bus between Cities	19%	16%	14%
Ferry/River Taxi/Srt. Scenic Cruise	10%	10%	12%
Railroad between Cities	7%	2%	1%
Rented Bicycle/Motorcycle/Moped	5%	9%	12%
Cruise Ship/River Boat 1+ Nights	4%	1%	1%
Motor Home/Camper	2%	1%	<1%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,271	\$3,330
Per Visitor Per Day (CA)	\$157	\$134	\$161
Per Visitor/Trip (California)	\$1,979	\$2,017	\$1,772
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	22.5%	22.3%
Air Transportation in the U.S.	5.9%	3.5%	4.4%
Entertainment	12.9%	13.5%	17.7%
Food/Beverages	19.9%	18.7%	17.9%
Gifts/Souvenirs	19.2%	25.5%	26.6%
Ground Transportation in the U.S.	6.3%	7.1%	8.6%
Other	4.2%	8.8%	2.5%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Brazil (n = 256)	Leisure Visitors from Brazil (n = 159)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	32%	22%
Cash from Home/Travelers Checks	27%	47%	57%
Cash Adv./Withdrawal Using Credit Card	18%	15%	16%
Cash Adv./Withdrawal Using Debit Card	6%	3%	2%
Purchases Using Debit Card	6%	3%	4%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	36 years	39 years
Average Age - Females	38 years	34 years	35 years
Occupation			
Mgmt., Business, Science & Arts	46%	58%	54%
Service Occupations	11%	16%	18%
Student	12%	9%	5%
Sales and Office	11%	6%	8%
Retired	8%	2%	3%
Homemaker	4%	1%	1%
Prod., Trans., & Material Moving	3%	2%	3%
Military/Government	3%	2%	3%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	1%	1%	2%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	25%	23%
\$20,000 - \$39,999	15%	16%	15%
\$40,000 - \$59,999	15%	10%	13%
\$60,000 - \$79,999	14%	19%	10%
\$80,000 - \$99,999	10%	15%	21%
\$100,000 - \$119,999	10%	5%	7%
\$120,000 - \$139,999	4%	3%	5%
\$140,000 - \$159,999	4%	1%	2%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	1%	<1%	-
\$200,000 and over	10%	4%	3%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$65,321	\$63,316

* 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."